

KANTAR

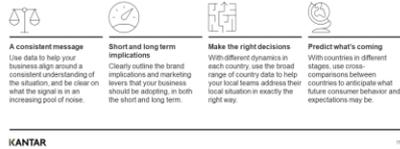
Welcome

Jane Bloomfield
Chief Growth Officer
Kantar UK



How we have built your story

Kantar's C19 Barometer has been designed to help you lead the reaction that your business needs to take, in the coming weeks and months



Our COVID-19 Barometer looking at consumer's attitudes, behaviours and expectations

STAN

Deploying Kantar's analytics AI toolkit and expertise to help brands navigating through the unknown



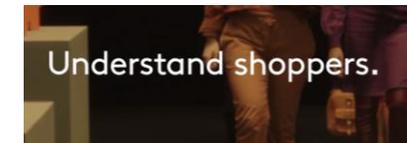
Using EVA to understand what people are really getting up to in self isolation

BRANDZ

Using the world's largest brand equity database to bring you learnings on the importance of strong brands



Thought-leadership, analysis, and intelligence on the most critical emerging trends, growth segments and opportunities



Using our retail team's expertise and our Worldpanel data to understand the effects on consumption

Your Kantar team today



Jane Bloomfield
Chief Growth Officer, UK



Laura Keeley
Strategic Client Partner



Silvina Rizzo
Global Product Manager,
AI Toolkit (STAN)



Ella Majava
Senior Consultant,
Human and Cultural
Practice



Andrew Walker
Client Knowledge Director



Martin Guerrieria
Global Head of Research -
BrandZ

What we are going to talk you through over the next hour

1.

Lessons from
China

2.

How are we
feeling?

3.

How are we
shopping?

4.

Implications
for brands

What you will hear today

Changing behaviour may be irreversible...

Adapt to the new situation ASAP

A “New Normal” is gradually forming...

Optimise online experiences to build desire

New voices and new concerns are raising...

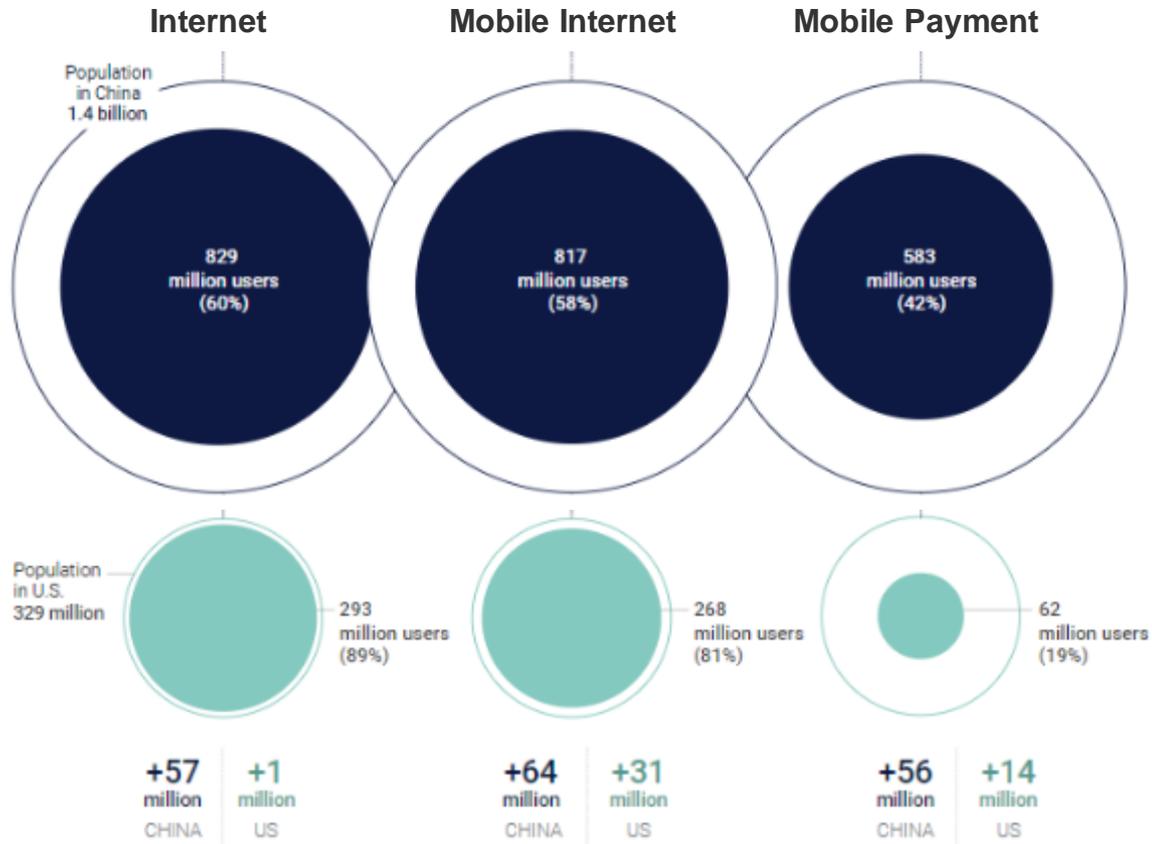
Redefine your strategy in the new context

Lessons from China

Jane



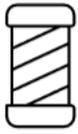
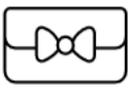
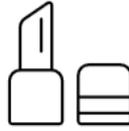
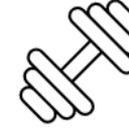
The Context Matters – Country Overview of China - Digital First Economy



The impact on certain sectors was profound during the pandemic

During the epidemic

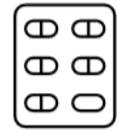
Spending decreased/canceled

 Out-of-home entertainment	 Out-of-home dining and gathering	 Travel	 Hairdressing /manicure
 Fitness group classes	 Medical beauty	 Clothing and accessories	 Luxury
 Alcohol	 Beauty products	 Financial management /stock	 Consumer electronics
 Large appliances	 Small appliances	 Home fitness equipment	

Less affected by the epidemic/ Almost unchanged

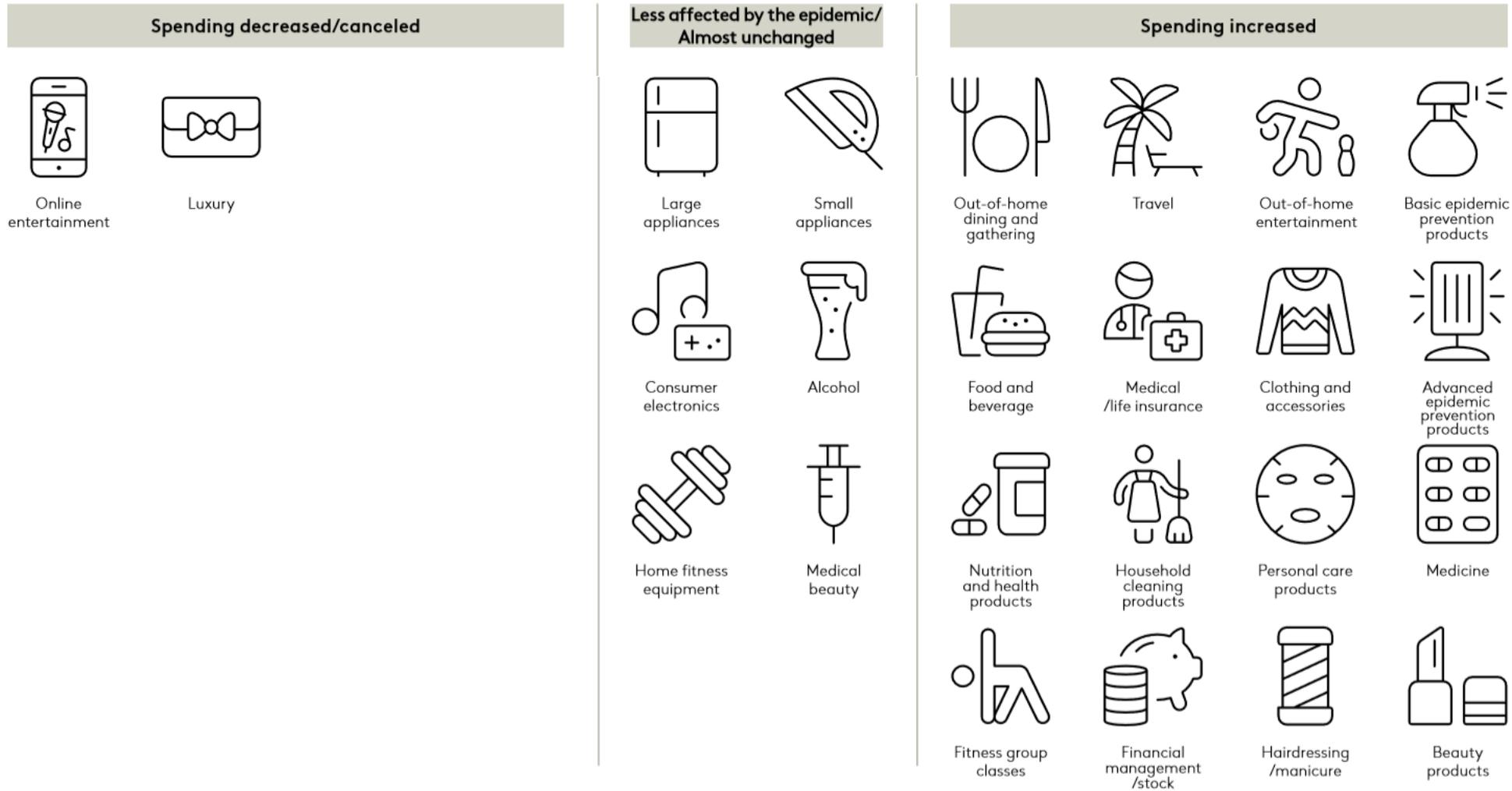

Personal care products

Spending increased

 Basic epidemic prevention products	 Household cleaning products	 Medicine	 Online entertainment
 Food and beverage	 Advanced epidemic prevention products	 Nutrition and health products	 Medical /life insurance

But after the pandemic, there is huge potential for rebound

(Expected) After the epidemic



Many consumers tried new things



34%

Online consultation



33%

Online education courses



29%

Telecommuting software



26%

Pay for online entertainment



21%

Watch live broadcast through mobile phone



18%

Social e-commerce/
Community groups



14%

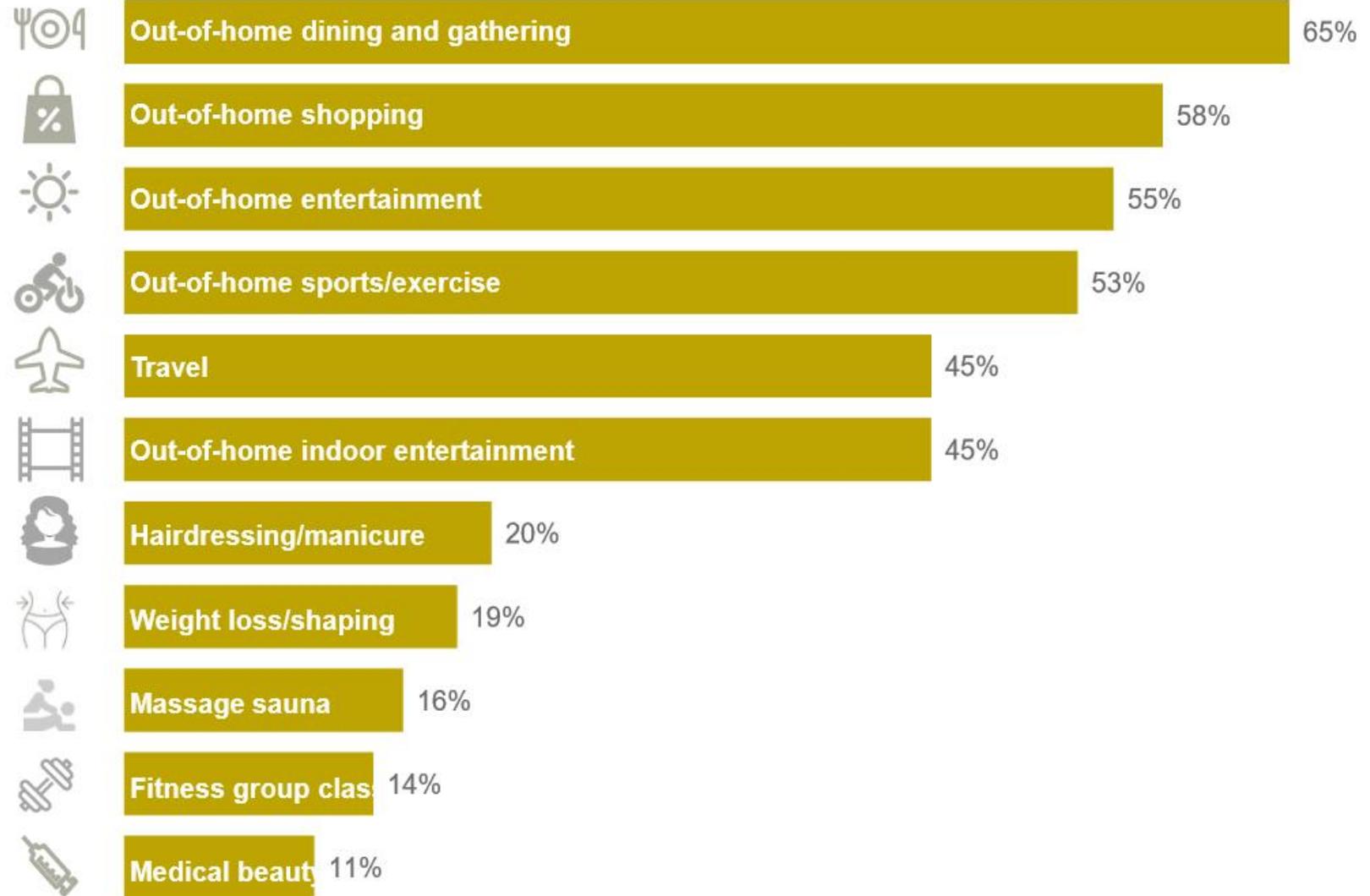
Buy indoor fitness equipment



13%

Try online banking

But everyone is looking forward to 'returning' to the new normal





"If Winter
comes,
can Spring
be far
behind?"

Lesson from China

PAY ATTENTION to the changes of consumer mindsets, consumption behaviour and lifestyles to enable more flexibility in the annual business plan, marketing & channel strategy, and the investment plan. Put more focus on at home occasion marketing

ACCELERATE digital transformation and bring digital initiatives into the real business such as increase investment on O2O channels.

STRENGTHEN brand-owned digital platform and embrace social eCommerce to efficiently interact with shoppers, enhance consumers stickiness, aim for first mover advantage on the new consumption battlefield. Pay attention to community-based eCommerce.

PROACTIVELY ADOPT new digital commerce tools, immersive experience tools to replicate the physical store shopping experience for online shopping.

How are we feeling?

Laura, Silvina and Izzy

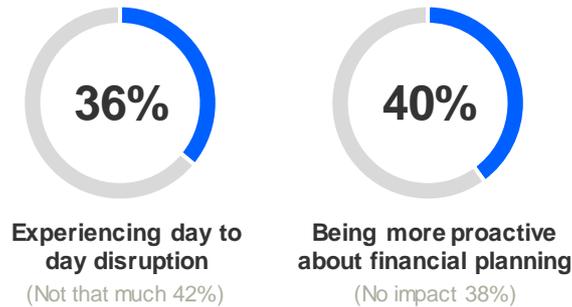


Last weekend, we were concerned – especially about potential economic impact - but not really feeling it yet

Feeling concerned

Hugely	26	About economic outlook	47%
	32		
	16	About health	39%
	15		
Not at all	8	About scarcity	20%

Personally impacted



Prioritising

1. Being prepared & informed **40%**
2. Worrying about myself and my loved ones **20%**
3. Ready to take action **16%**

Wanting advice about:

Prevention



Diagnosis

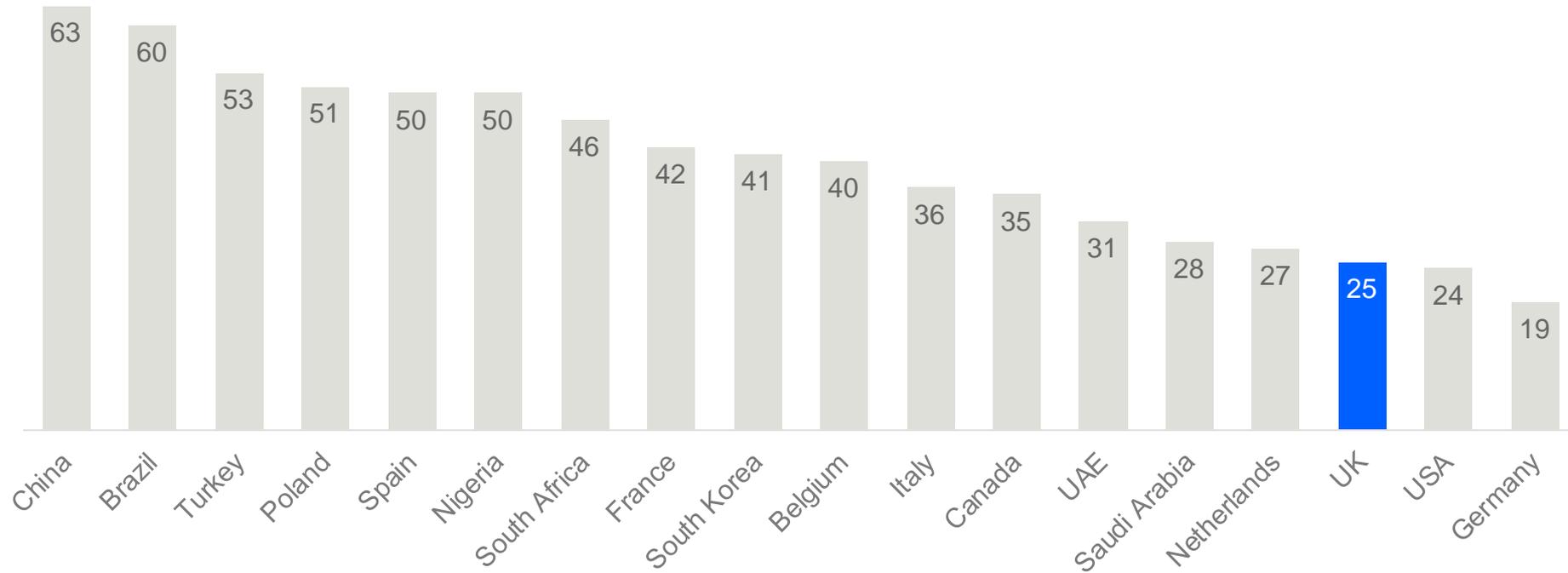


Behaviours



We are less worried than our European neighbours

“The situation concerns me hugely”



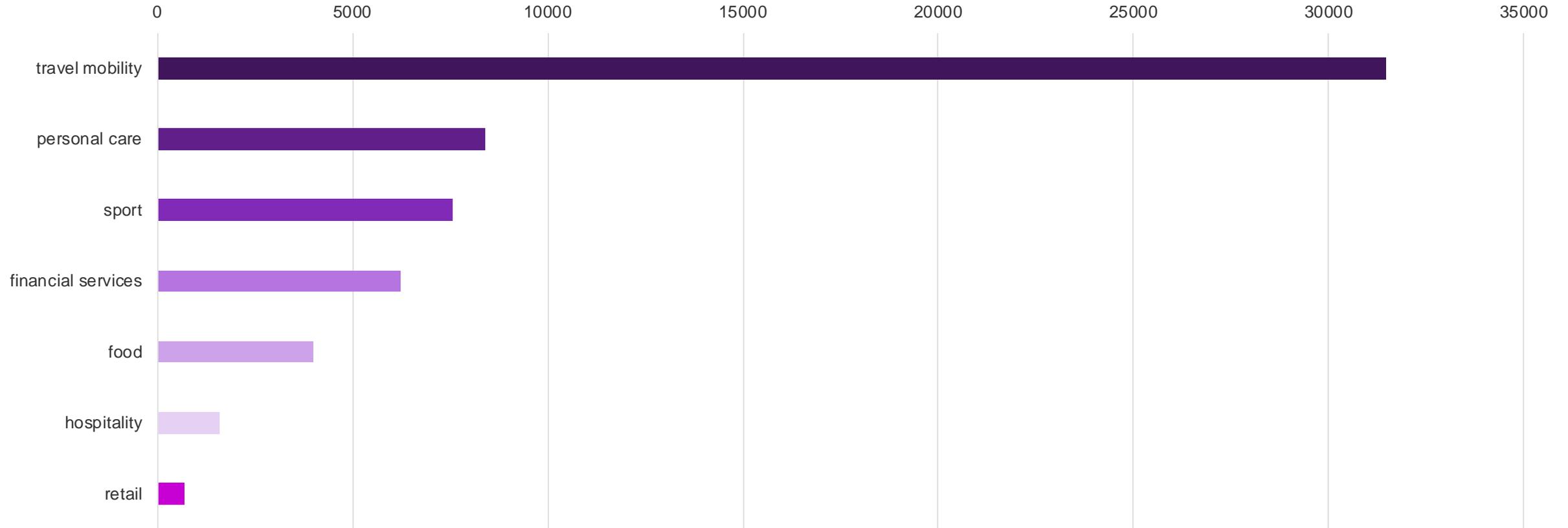
When we talk about Coronavirus online – this is what we also talk about

And this mirrors the stage of the pandemic in that specific geography. WFH in US, travel bans across Europe, early stage signals in France, aftermath in China

Market	#1 co-occurrence		Volume of co-occurrence
US	At work (location)		10870
UK	Travel mobility (category)		612
Italy	Travel mobility (category)		2112
China	Death (concern)		4428
France	Symptoms (concern)		725

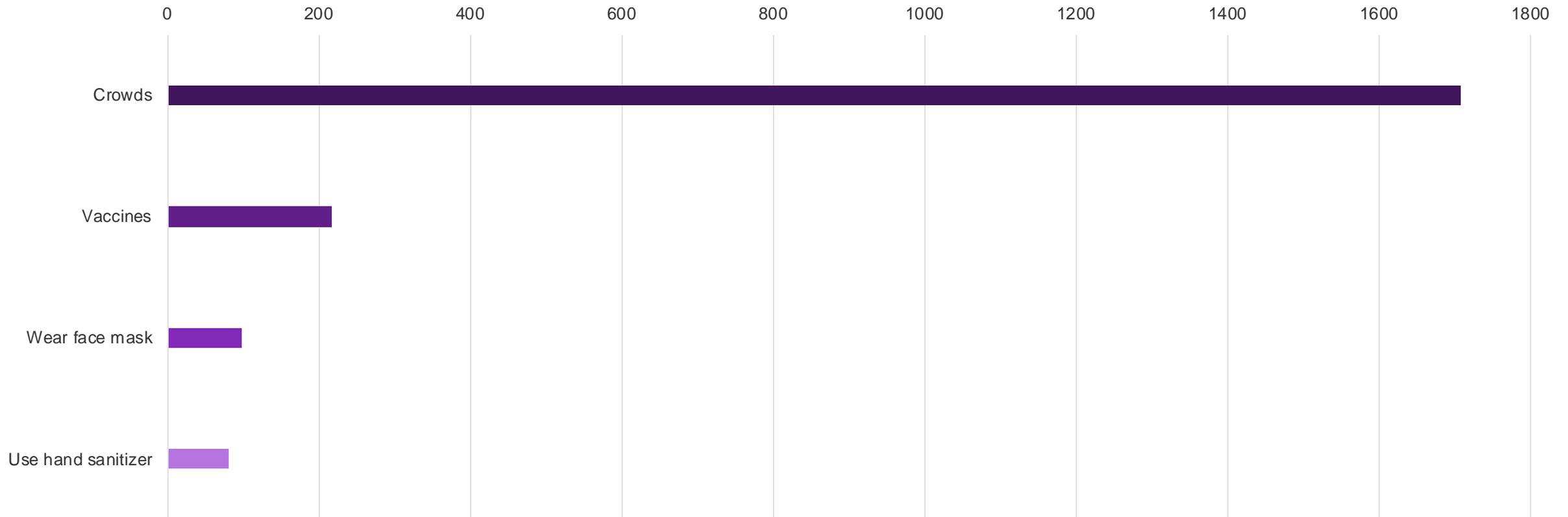
Consumers are mainly discussing travel and mobility

in light of the virus outbreak, followed by personal care. Third ranked sport points to the global cancellation of events, while financial services hints at worries about the future



Above all we're trying to minimise risk. Diving deeper into safety, we see that consumers are discussing ways to be safe like avoiding crowds, finding a vaccine, or using products like face masks or hand sanitizer

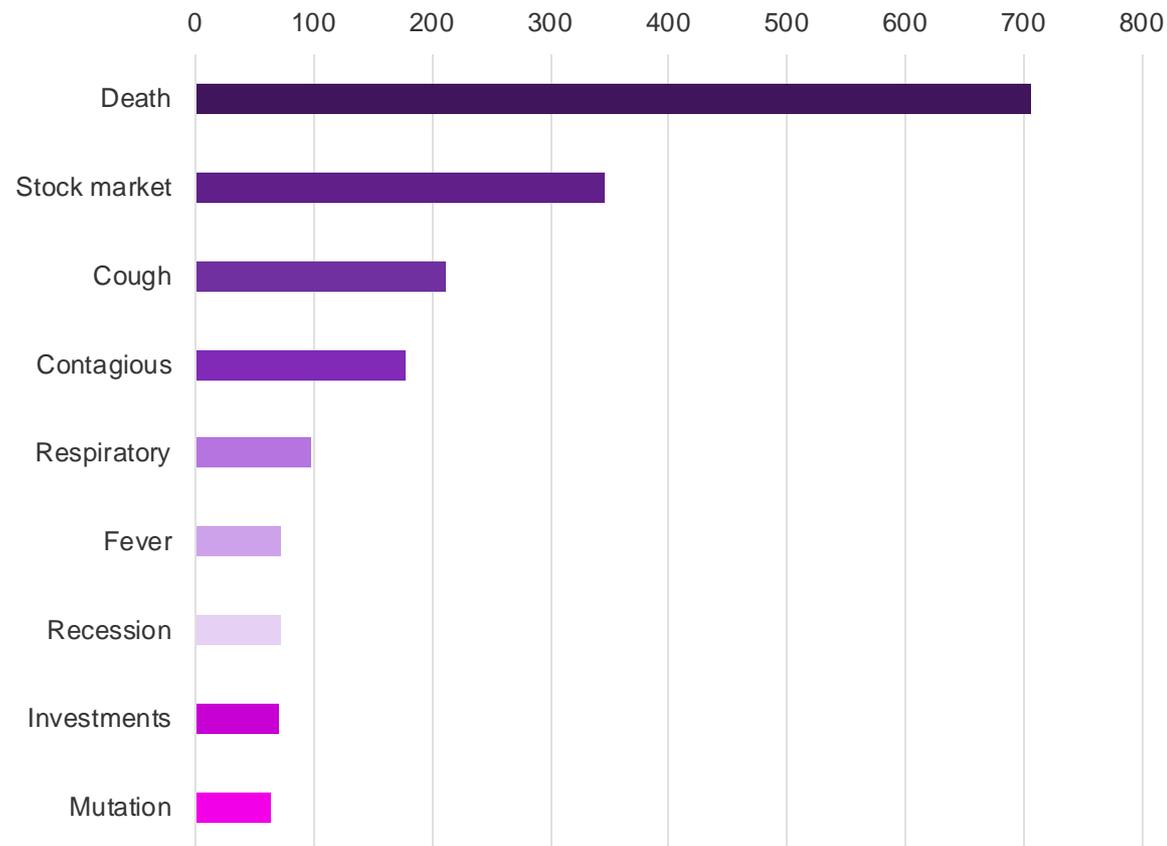
Behaviours linked with safety



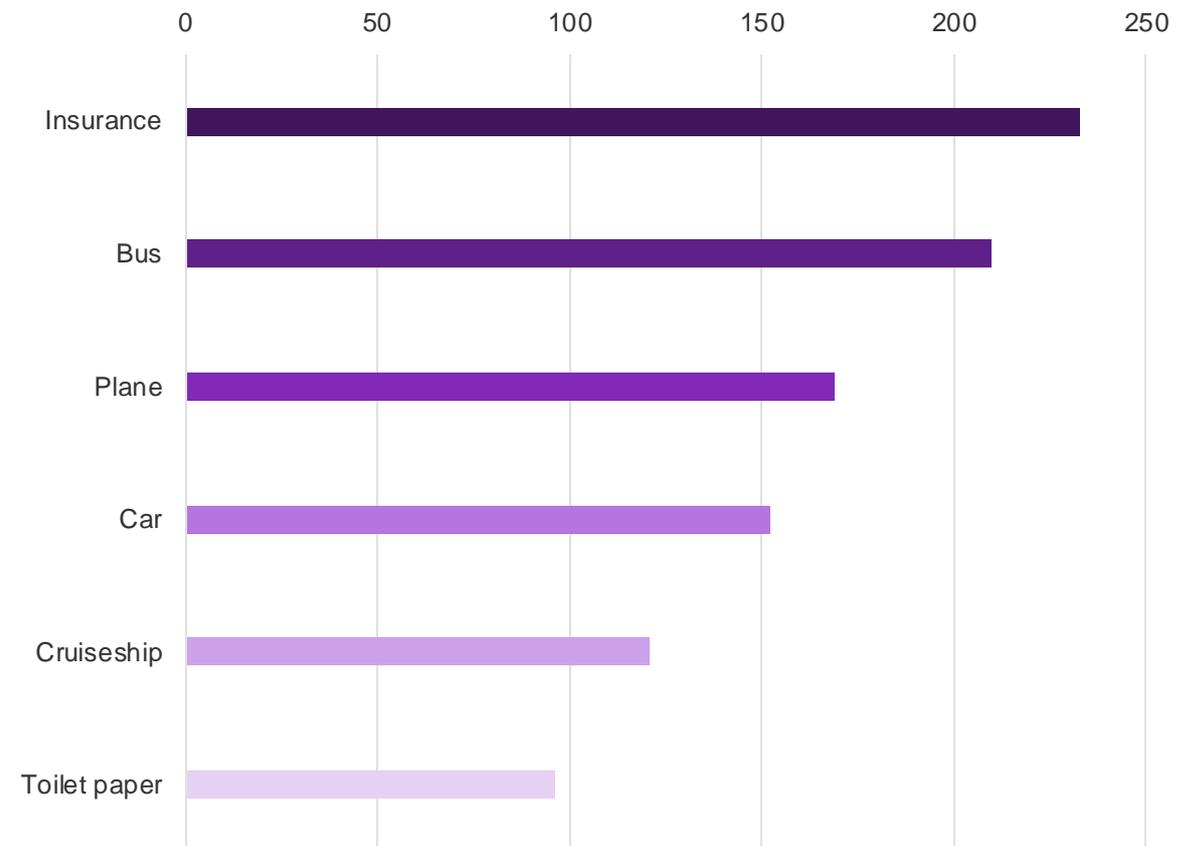
Concerns associated with 'panic' focus on two themes

Symptoms and the financial future of consumers (stock market, insurance). The insurance category is associated with mentions of fearful – coverage of treatment in future

Concerns associated with panicked



Categories associated with fearful





“Our duty, and certainly the message that we give to the finance ministers, to the policy makers, is ‘be prepared’. Make sure that your financial sector is under good supervision, that it’s well regulated, that the institutions are rock-solid, and anticipate at home with enough buffers so that you can resist the potential crisis.”

Christine Lagarde on future global financial crises

PLANNING AND STRATEGY

Apprehensive because of the uncertainty.

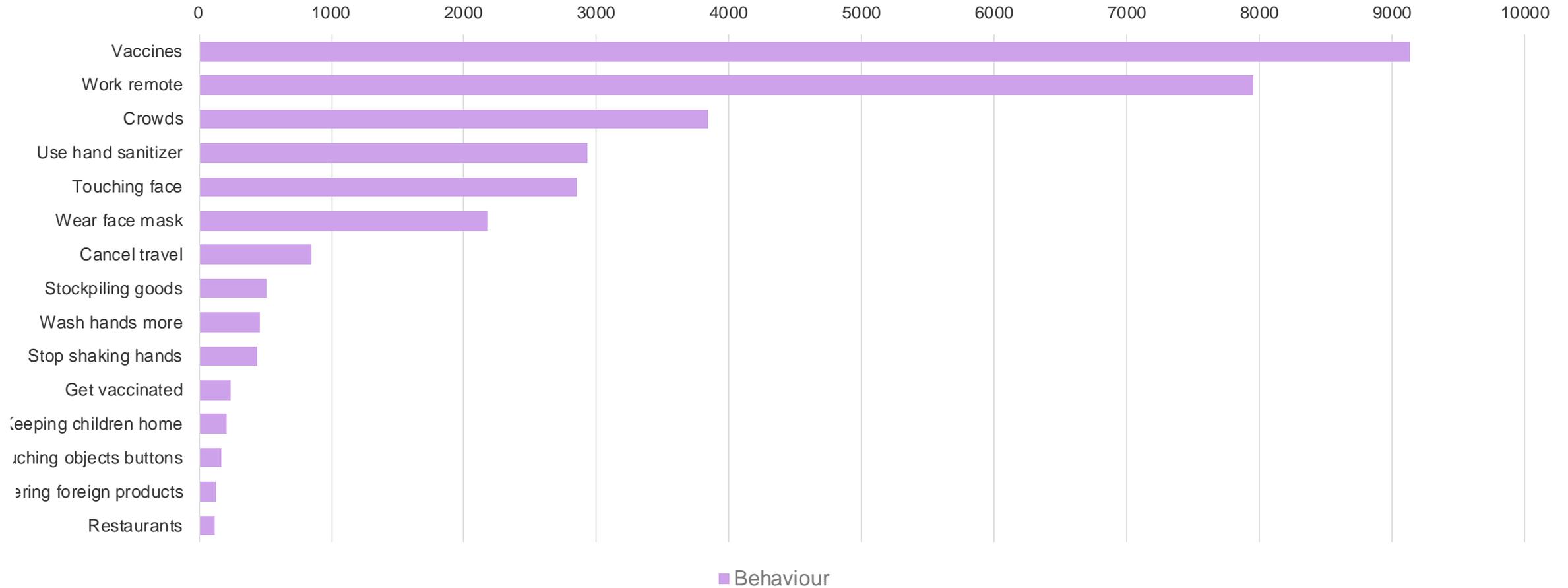
Seeking as much certainty in their lives as possible e.g. planning, business continuity.

Know they must stay clear-headed and calm.

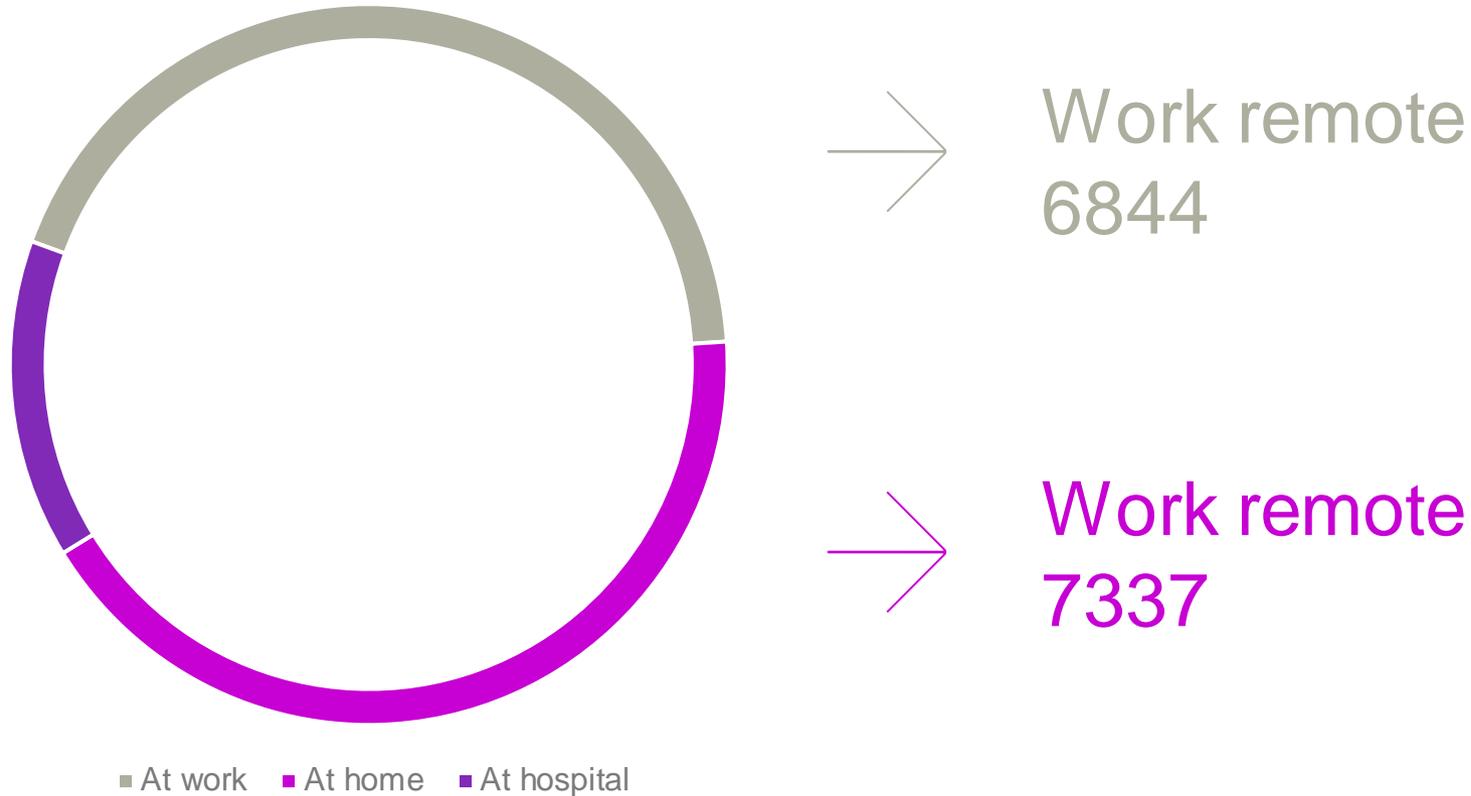
Taking long term view – analysing decisions carefully and sticking to a plan.

While discussing their crisis behaviours, consumers are future-oriented

and discuss the lack of the remedy/vaccine and the need for development, while simultaneously sharing their present reality – working from home and avoiding crowds



If we are at work, we are talking about being at home. And if we are at home, we are worried about doing work



We identified 6 core themes from the images shared by people, representing their new needs and approaches

NO, SERIOUSLY (40%)

Memes and selfies are normally frivolous and funny but it seems that in times of crisis they morph into something different.

SOFA AND SNUGGLES (13%)

Getting cosy and feeling safe with our pets and the people that we are close to.

LONGING FOR NATURE (17%)

As people stay inside it seems they are increasingly dreaming of outside (17%).

CREATIVITY AND CRAFT (9%)

As the days grow longer with little to do and nowhere to go people turn to their own creativity to keep entertained.

LAPTOP LIVES (13%)

People are resourceful, and we see people quickly adapting, by switching their social and work lives into a digital format.

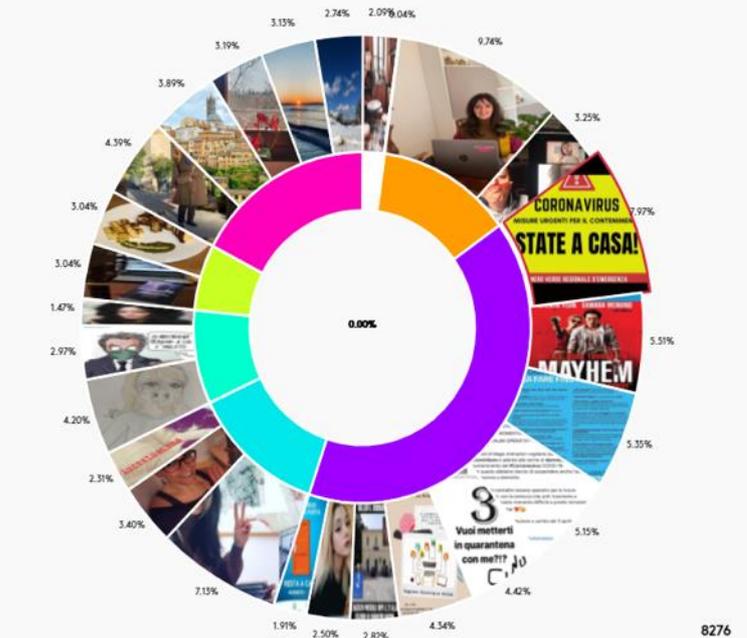
THE NEW ESSENTIALS (6%)

People love to share images of the things that are important to them. There are a whole host of 'new essentials' for self-isolation that people are sharing content around

VISUAL CLUSTERS IDENTIFIED ON EVA

Themes identified:

- NO, SERIOUSLY
- LONGING FOR NATURE
- LAPTOP LIVES
- SOFA AND SNUGGLES
- CREATIVITY AND CRAFT
- THE NEW ESSENTIALS



6 Key Take-Aways for Brands

#1

Get the cue for your tone of voice from consumers.

Think ahead and take constant temperature checks so you understand the changing public mood and sentiment.

#2

Enable future planning.

Remind consumers of the future and enable them to make plans for it.

#3

Be an enabler of resourcefulness.

Support consumers with ideas, products and services that help them adapt.

#4

Help create moments of calmness and joy.

Consider how you can play a role in maintaining mental and emotional wellbeing.

#5

Help people learn new skills, make and create.

Recognise consumers' desire to be more active and creative with your products and services.

#6

Identify the essentials that matter to your consumer.

Understand that people's needs continue to be individual. Help people lead the lifestyles they want and pursue their passions.

How are we shopping?

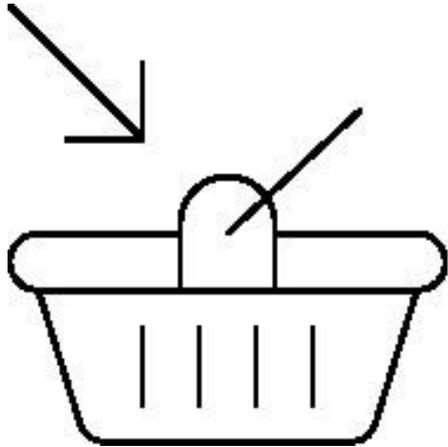
Andrew



The behaviour behind the headlines

We started with the premise that bulk purchasing was the key behaviour to understand

Two factors to define a 'stockpiler' at a category level



1 big week

(bought more in a single week than at any point during the previous 12 months)



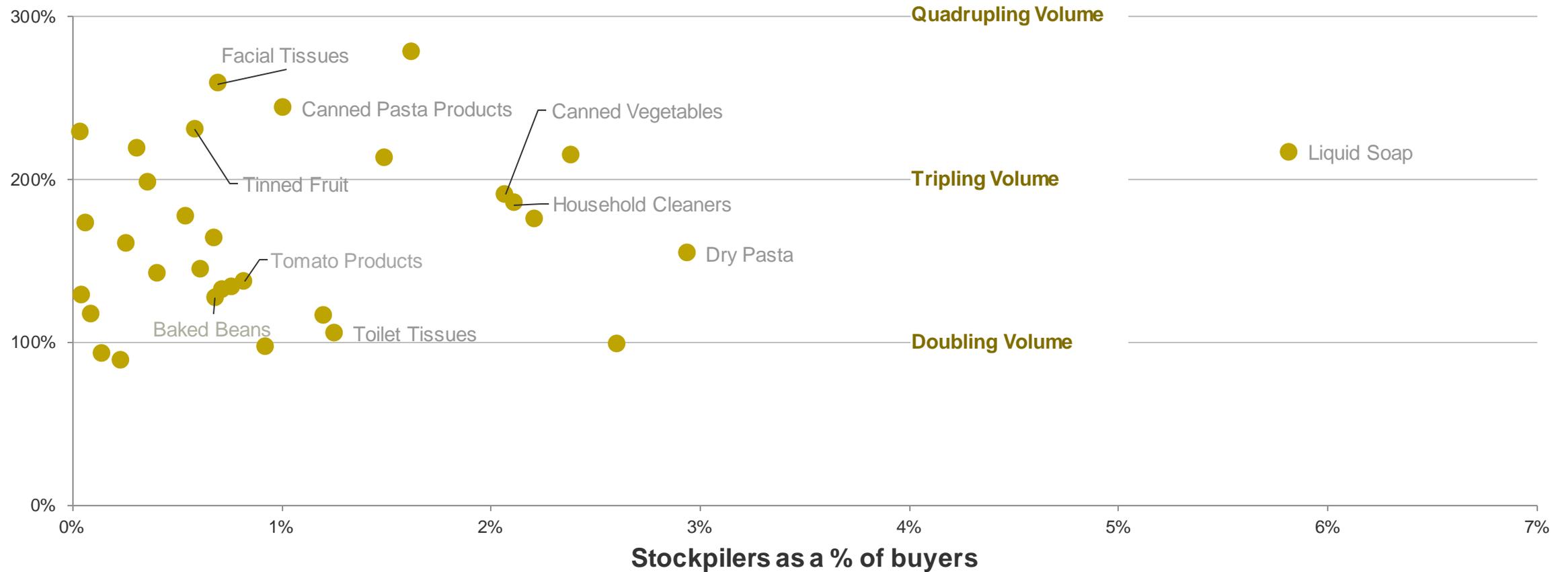
Growth in purchasing

(buying more in the year to date than the equivalent period last year)

Beyond Liquid Soap, the expected categories stand out and behaviour is varied

the absolute figures look small is there another effect at play here?

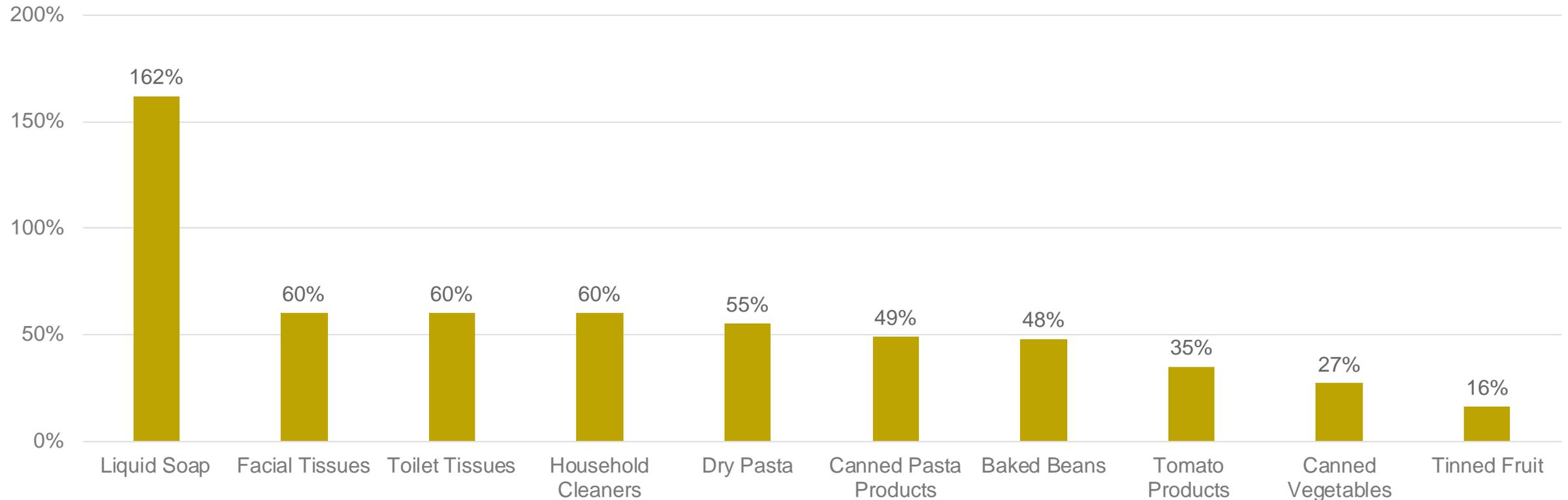
grocery Categories - % stockpilers vs. volume stockpiled



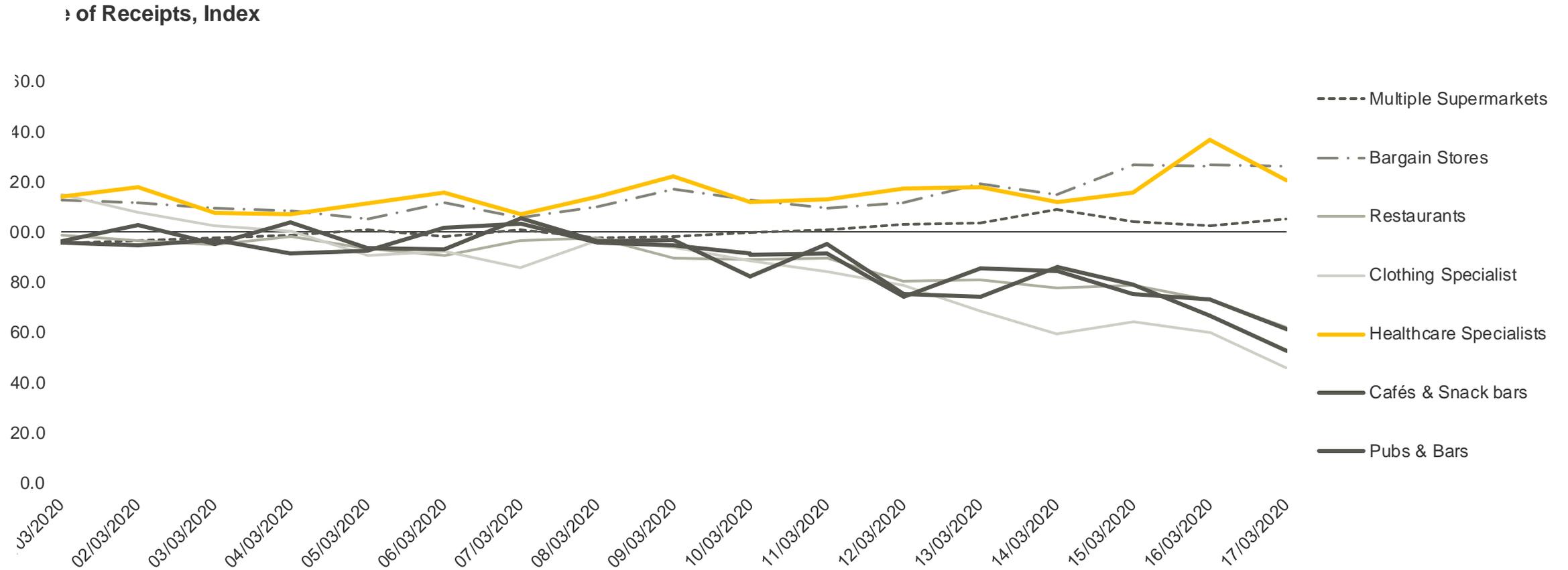
Spikes in demand are driven by more purchases rather than bigger purchases

is would imply measures to stop bulk purchasing will have only a limited effect.

increase in category purchases in w/e 8th March vs. yr ago



Extra footfall is benefitting Multis, Bargain Stores & Healthcare specialists



3

The three battles that Britain's retailers have survived this week

The battle to enforce social distancing



This is McDonald's in London

The battle to keep stocks on shelves

 **Aldi Stores UK** @AldiUK · 49m

I am writing to reassure you, and all our other valued customers, that our colleagues and trusted suppliers are working round the clock to keep our warehouses fully stocked.

Read more: bit.ly/39PmHjb



This is Aldi Stores UK

The battle to protect staff and shoppers from infection

 **Google Hits** @HitsGoogle · Mar 6

Costco worker 'sprays customers with disinfectant' as they queue to enter store as **coronavirus** panic grips UK trends.blogdady.com/costco-employee...



This is Costco UK



The two battles Britain's retailers will fight next week

The battle for home delivery

Ocado @Ocado · Mar 16
Due to unusual demand, we are temporarily prioritising deliveries for our existing customers. We will not be processing new customer bookings for the time being.

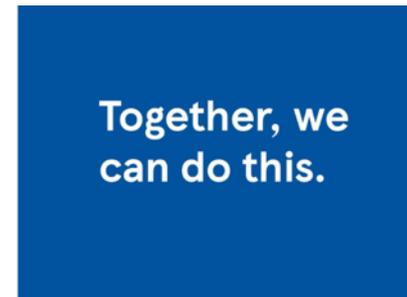
Priority for our existing customers

163 21 339

The battle for 'fresh'

From Thursday 19 March we will start to implement the following changes:

- To ensure more people have access to everyday essentials, we are introducing a storewide restriction of only 3 items per customer on every product line, and removing multi-buy promotions.
In order to allow Tesco colleagues to focus on stocking shelves, helping to provide the essential groceries you are looking for and to avoid waste, we will close all meat, fish, deli counters and salad bars.



COVID-19: A message to our customers from Dave Lewis, Tesco CEO
18 March 2020

31

The one thing we need to keep in mind – this is a war and wars bring out the best and worst in all of us



Why work for Morrisons

[View Case Studies](#)

The outbreak of coronavirus will affect businesses across the UK and Morrisons will be offering jobs to people that are impacted

A screenshot of a social media post from Home Bargains. The post includes the company logo, name, and a timestamp. The main text is an announcement regarding a £30 million Coronavirus Fund for staff and customers.

Home Bargains
1 hr · 🌐

!! Announcement to all our staff and customers !!

To our staff: Thank you for your amazing work during this unprecedented time. We want you to feel secure during this turbulent period, so have created a £30 million Coronavirus Fund to financially support you during the outbreak. This will include paying staff that need to self-isolate for up to two weeks by maintaining their pay during this period, and to support Team Members in high risk groups that need to isolate for longer periods. If staff do not need to self-isolate between now and December they will be paid two weeks' extra salary, so they do not miss out. For more details on eligibility and how this all works, please visit The Staff Portal.



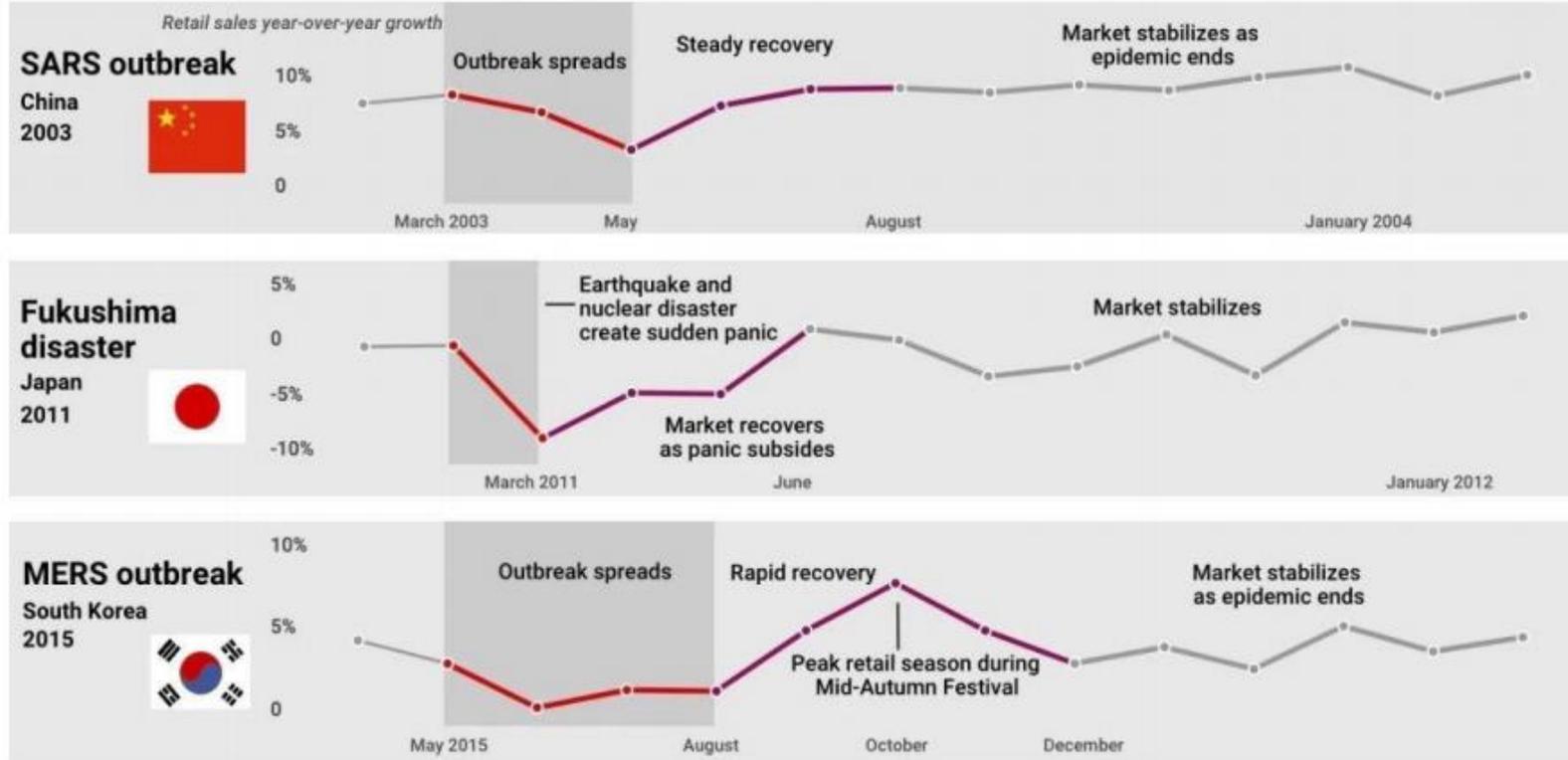
Implications for Brand Management

Martin, Laura and Jane

Step 1:
Don't lose sight of the
long term



Precedent – Previous Events showed elastic economic behavior



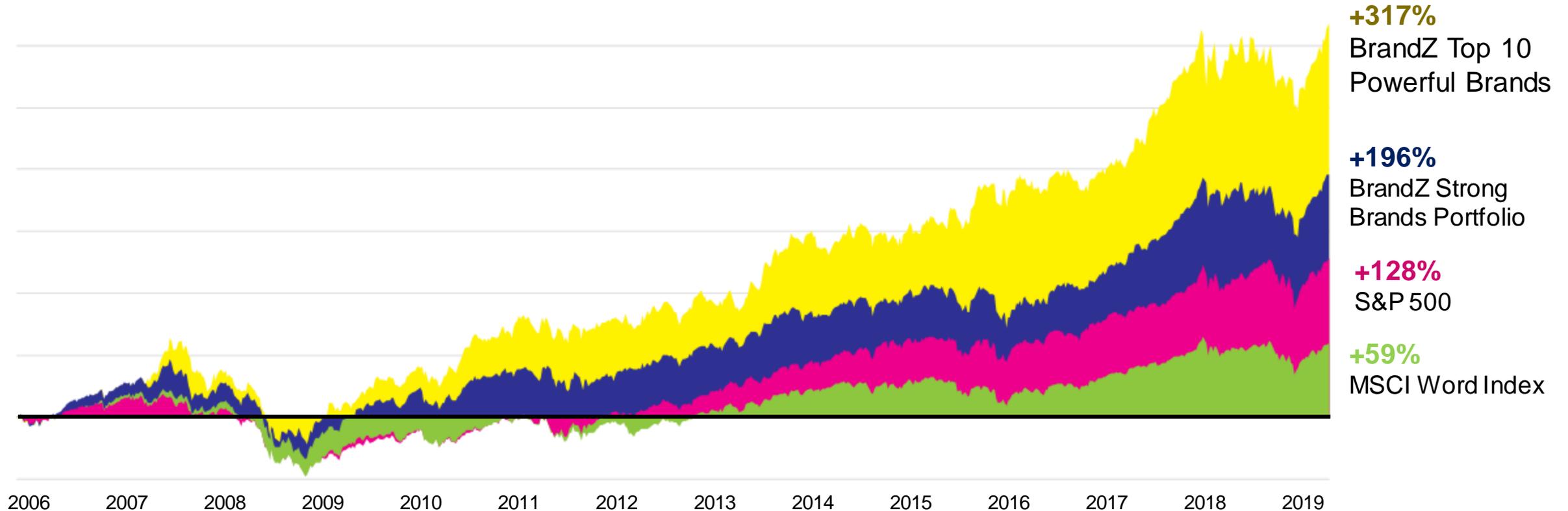
Sources: China National Bureau of Statistics; Japan Ministry of Economy, Trade and Industry; South Korea government statistics

Previous epidemic/disasters have shown short term impact, but generally recovery is seen over a period.

Saliency is
incredibly important
at times of crisis –
particularly in
commodity
categories



We've seen before that strong brands recovered NINE TIMES faster following the financial crisis of 2008



We know the travel and tourism sector in particular is under huge pressure at present

Airlines, travel agencies, hotels and cruise companies face potentially huge losses

Coronavirus: travel industry crisis sparks comparisons to 9/11 aftermath

As workers limit travel and would-be vacationers stay home, airlines, hotels and cruise companies face bleak outlook



<https://www.theguardian.com/world/2020/mar/10/coronavirus-travel-industry-crisis>

Virus 'could cost millions of tourism jobs'

13 March 2020 177

f t e Share

Coronavirus pandemic



<https://www.bbc.co.uk/news/business-51852505>

BA says jobs will go as airline industry faces crisis 'worse than 9/11'

Coronavirus memo says British Airways will be 'parking aircraft in a way we never have before'

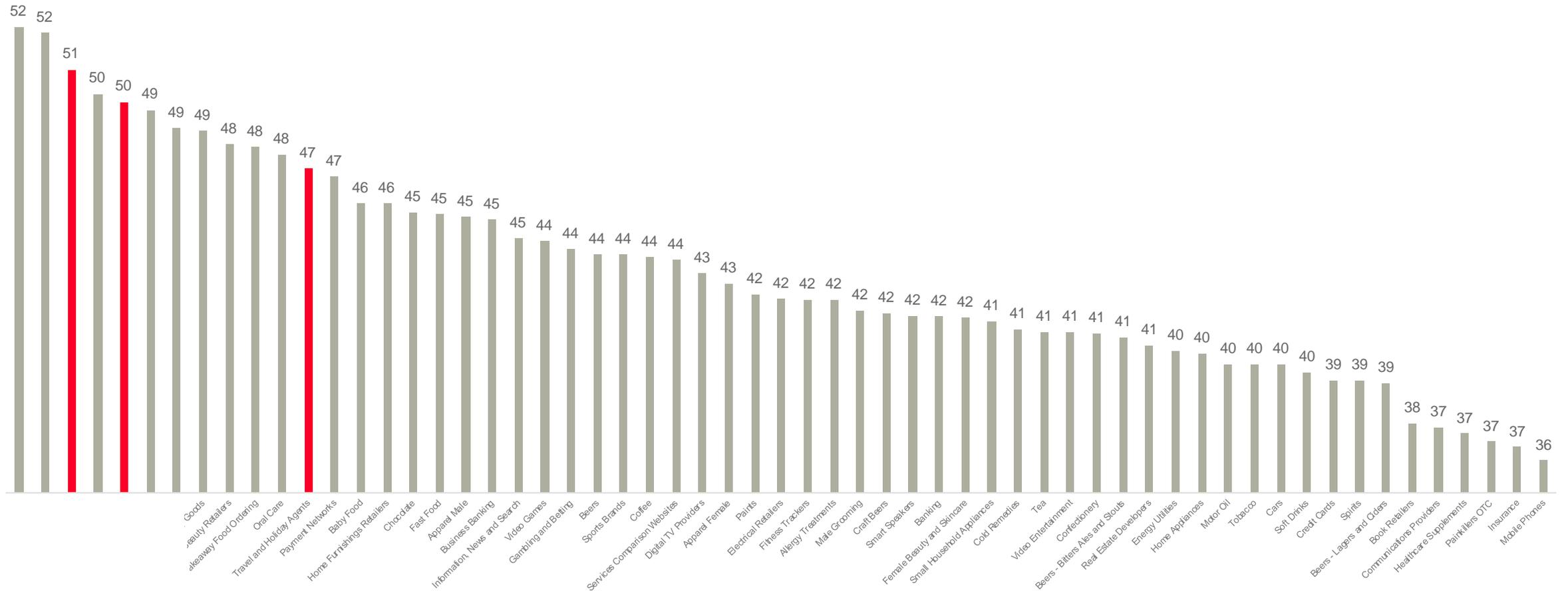
Coronavirus - latest updates



<https://www.theguardian.com/business/2020/mar/13/ba-says-jobs-will-go-as-airline-industry-faces-crisis-worse-than-9-11-coronavirus>

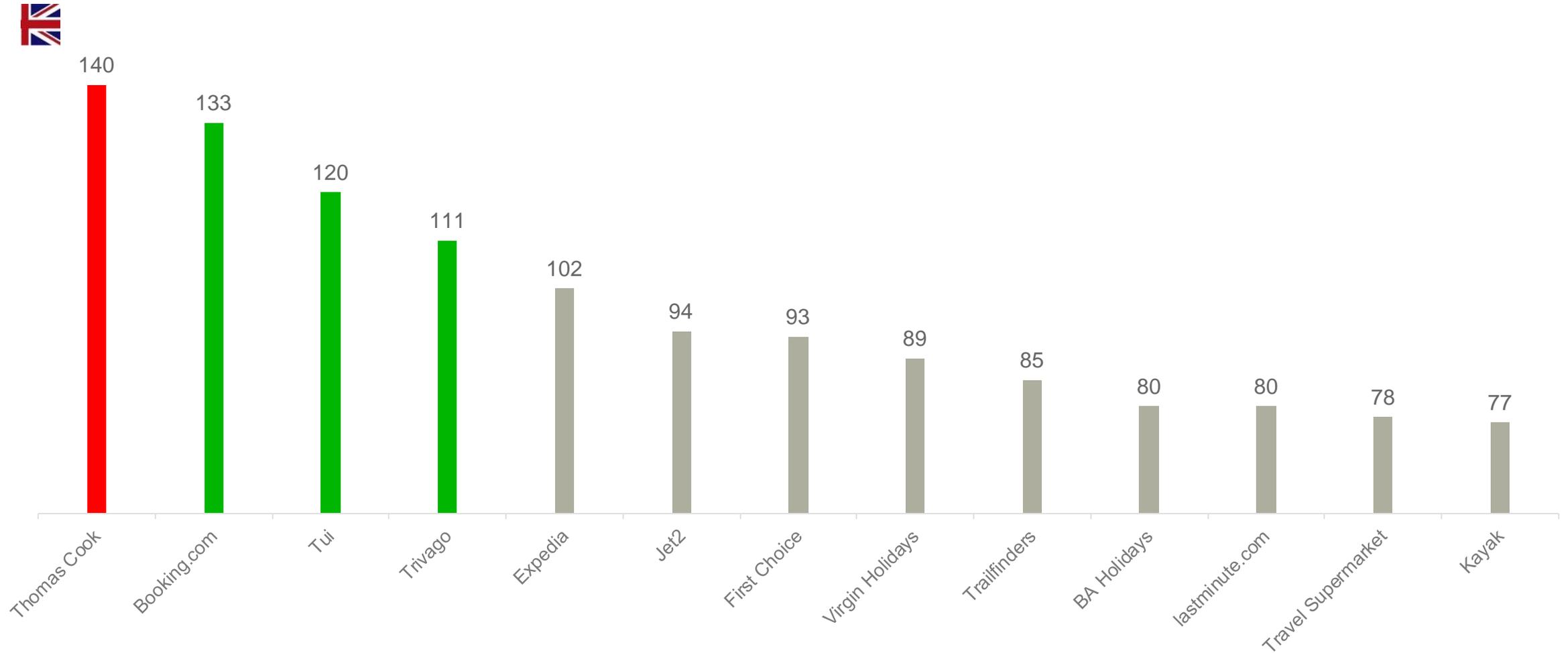
Salience plays a crucial role in brand equity and consumer decision making in these categories in the UK

% contribution of Salience to Power in UK categories 2018/19



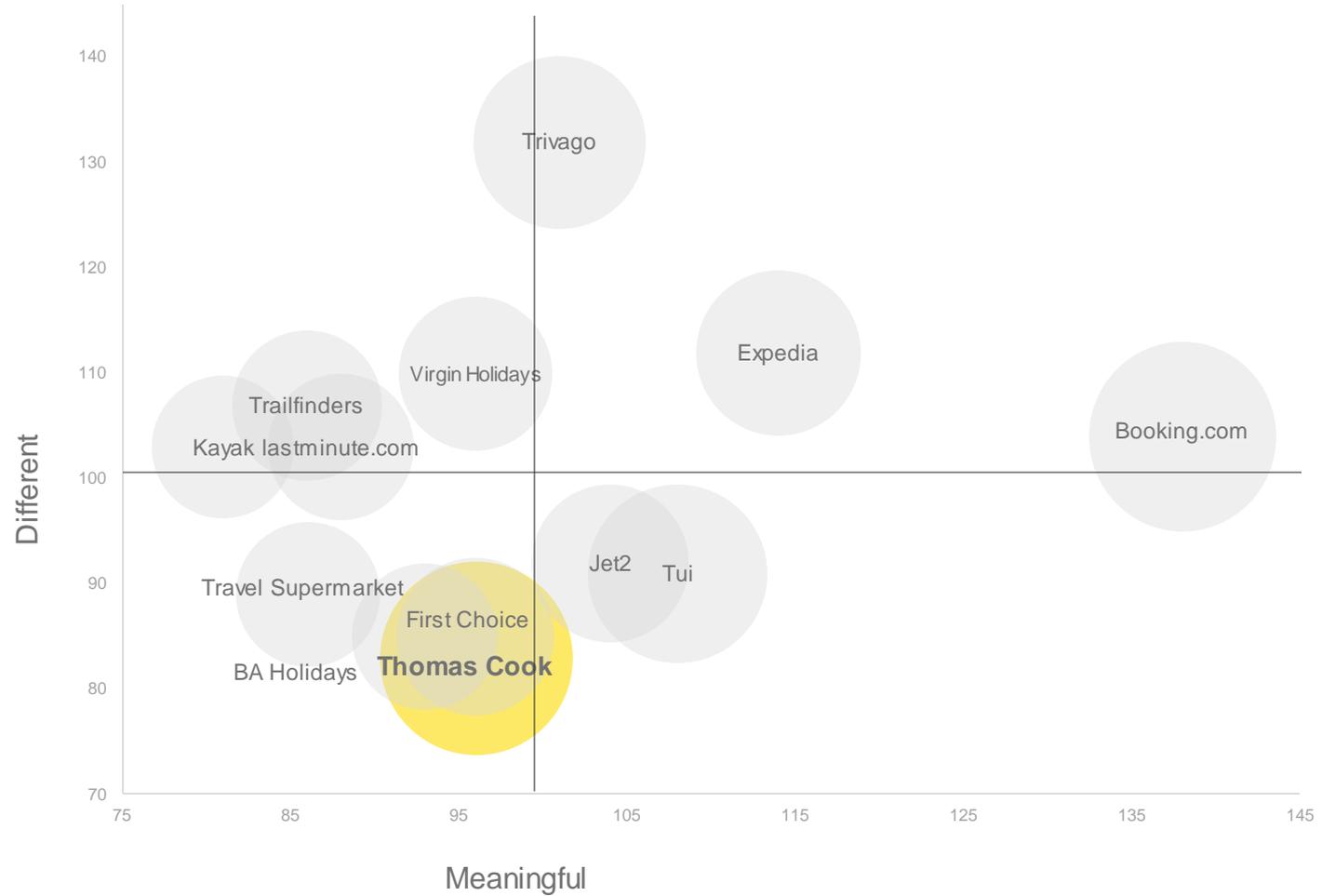
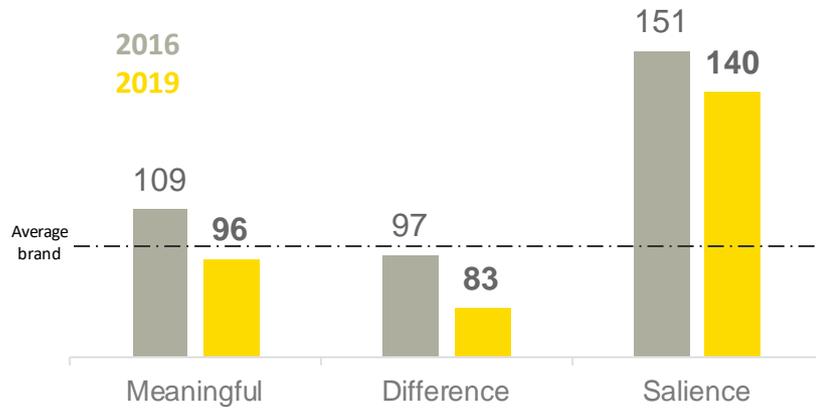
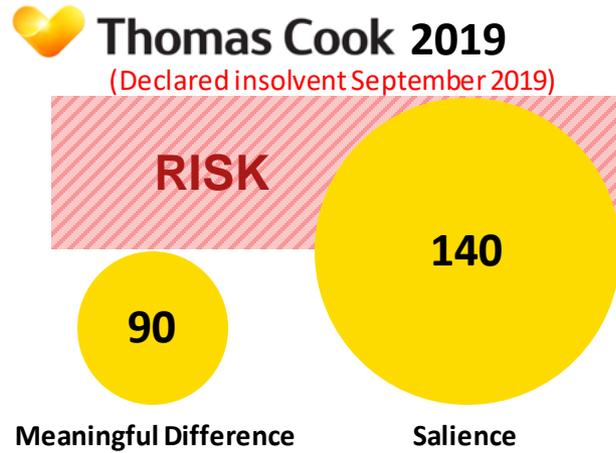
1. Thomas Cook WAS the most salient travel agent for UK holidaymakers...?

Travel and Holiday agents - Salience



Yes but salience alone is Not enough.

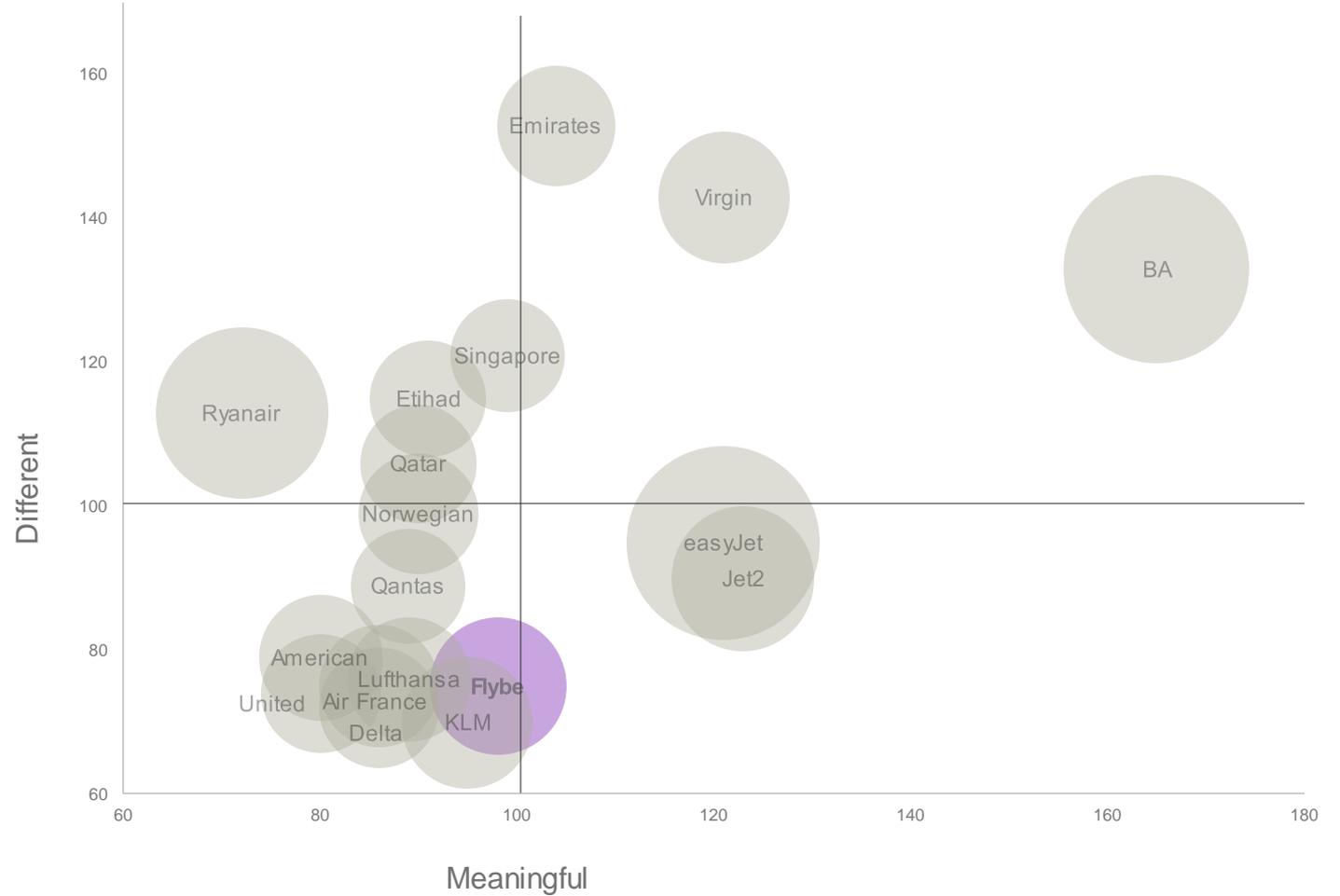
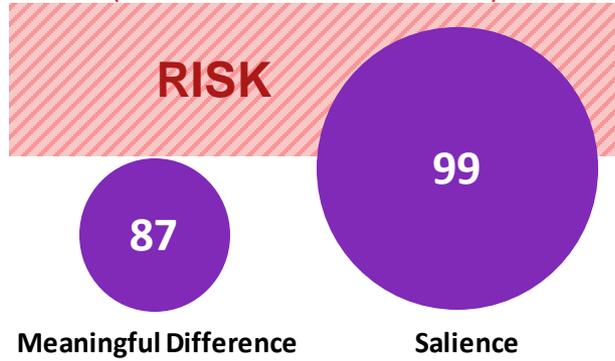
For Thomas Cook, declining meaningful difference proved to be the brand's undoing in the long term



2. Similarly Flybe was ultimately undone by a lack of relevance and differentiation – despite the last ditch bailout attempt



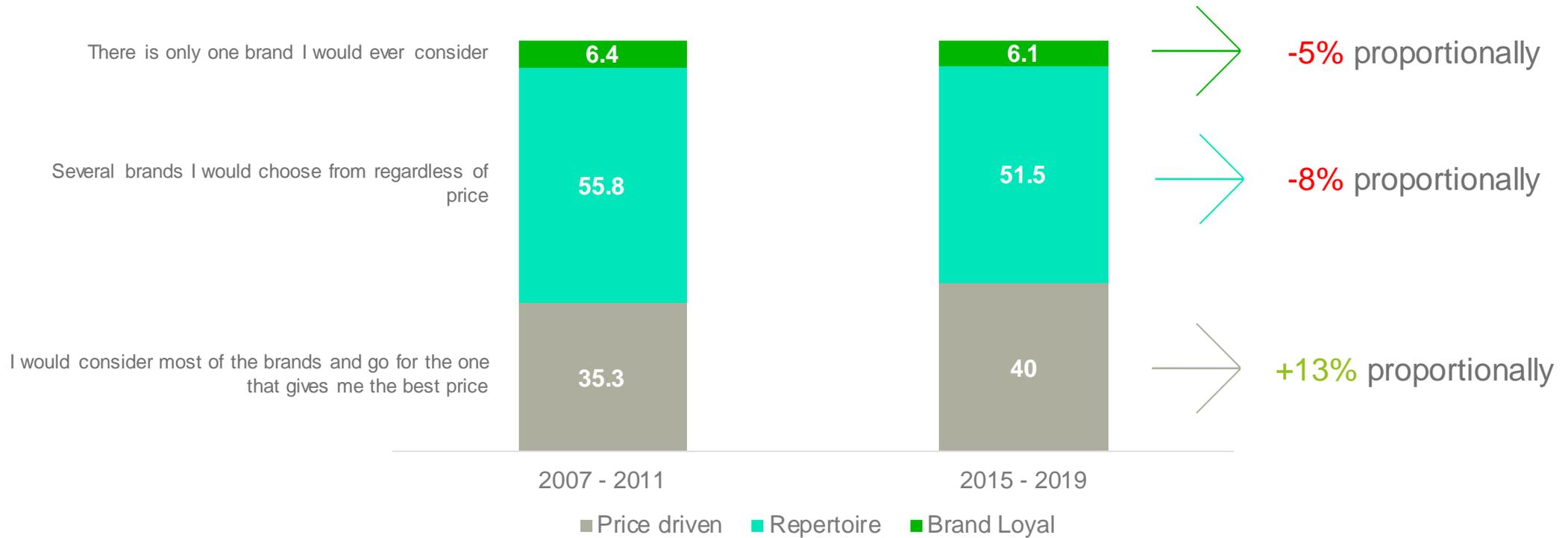
(Declared insolvent March 2020)



UK consumers are slowly becoming more price driven – we may see the current environment facilitate this trend alongside a temptation for some brands to drop prices

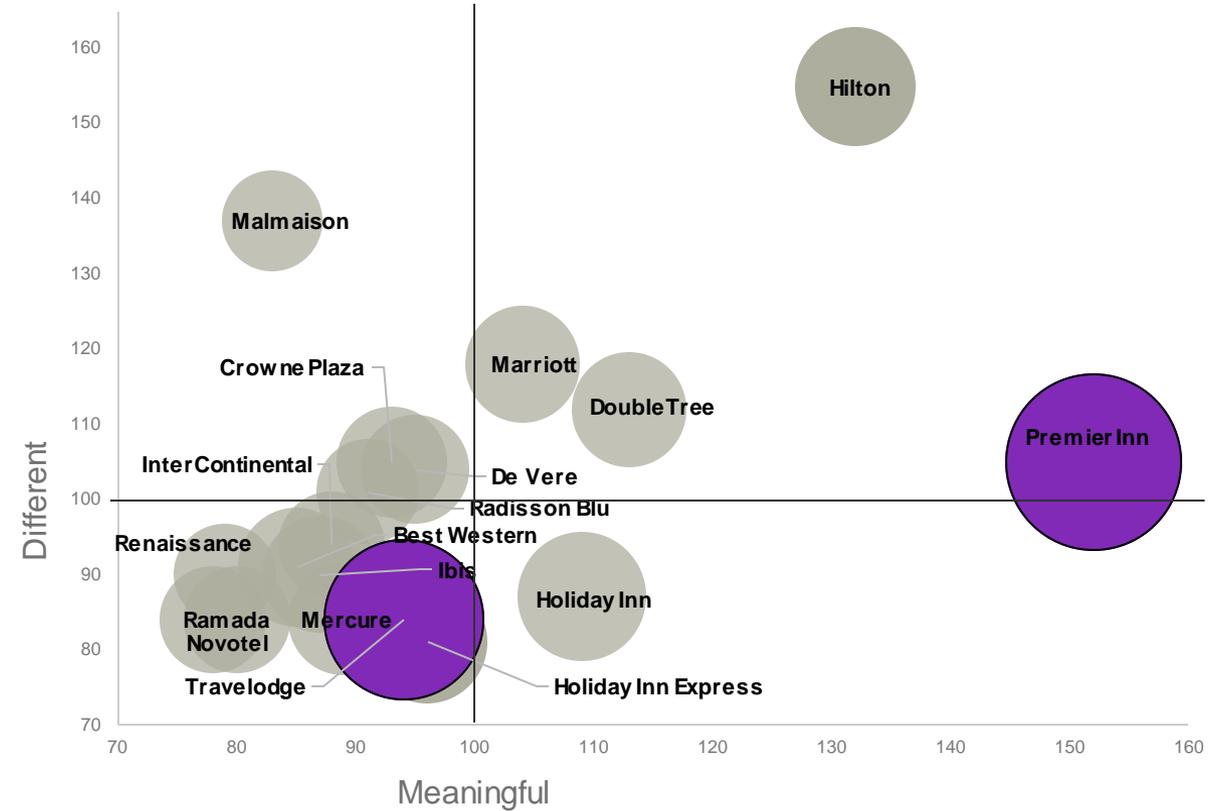
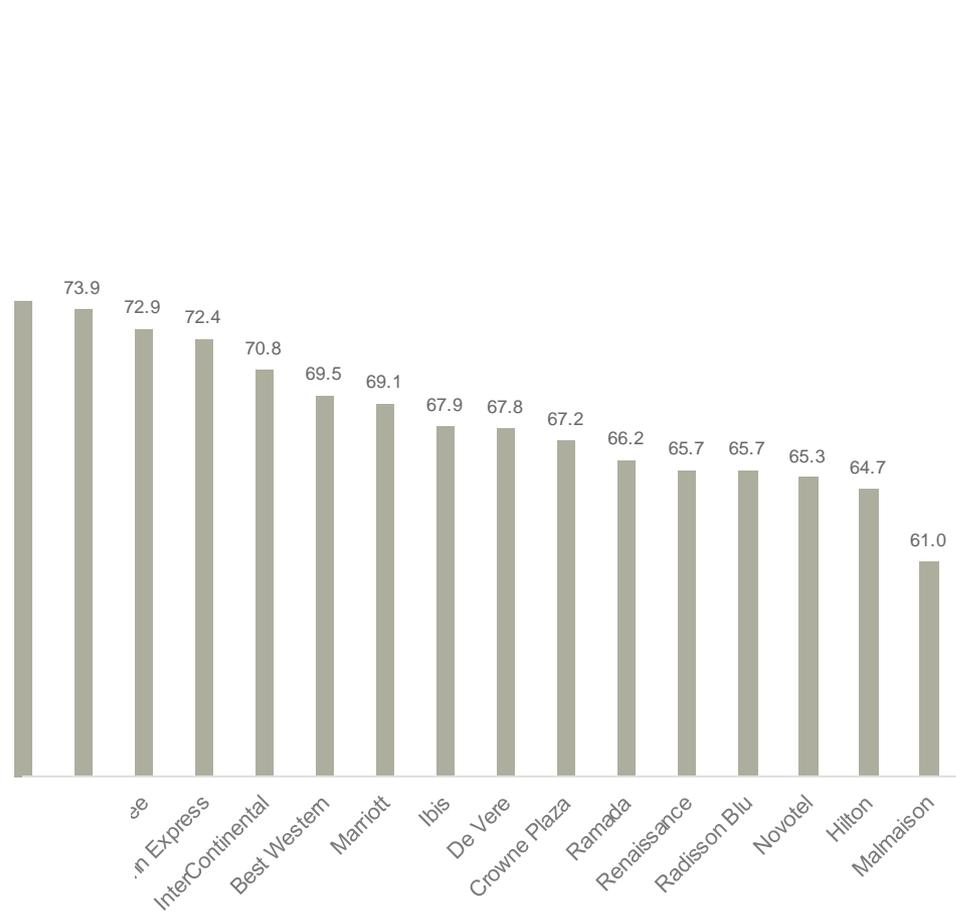


UK consumer brand attitudes



3. Travelodge and Premier Inn are very salient within the UK hotel market. Both have similar price points and levels of perceived 'worth' - care needed if 'cheap' is a brand's only differentiating factor should market prices fall

and Holiday agents



In summary

Brand building investment pays for itself and then some

Experience shows that brands with the strongest brand equity are best placed to grow their value but also to recover faster during difficult economic times

Marketing is an investment not a cost and a tough financial environment will make this clearer than ever

What's your 'salience strategy'?

In commoditised categories, salience is a particularly large influence on decision making

Manage the short term by focussing efforts on maximising salience versus competitors

Maintain spend as far as possible, aiming for a SOV above market share - target channels best suited to maximise reach – TV and outdoor if budgets allow but consider the value available from digital channels and search engine optimisation

Plan for the long term

Ultimately Meaningful Difference remains THE best indicator of long term brand value growth

Salience brings a brand into the conversation but clear meaningful difference delivers the punchline at decision time

Consider your current relative position and the key associations to target in your category

Be prepared to make pricing decisions

In challenging times market pressures may necessitate a short term change in pricing strategy - be ready to adjust relatively but be clear on where to draw the line and stick to it

Price equals profit and profit equals opportunities for innovation and brand building investment

If your brand is trading on price alone, beware – a combination of salience and price can only work when low price is a genuine differentiator

Step 2:
Reaction



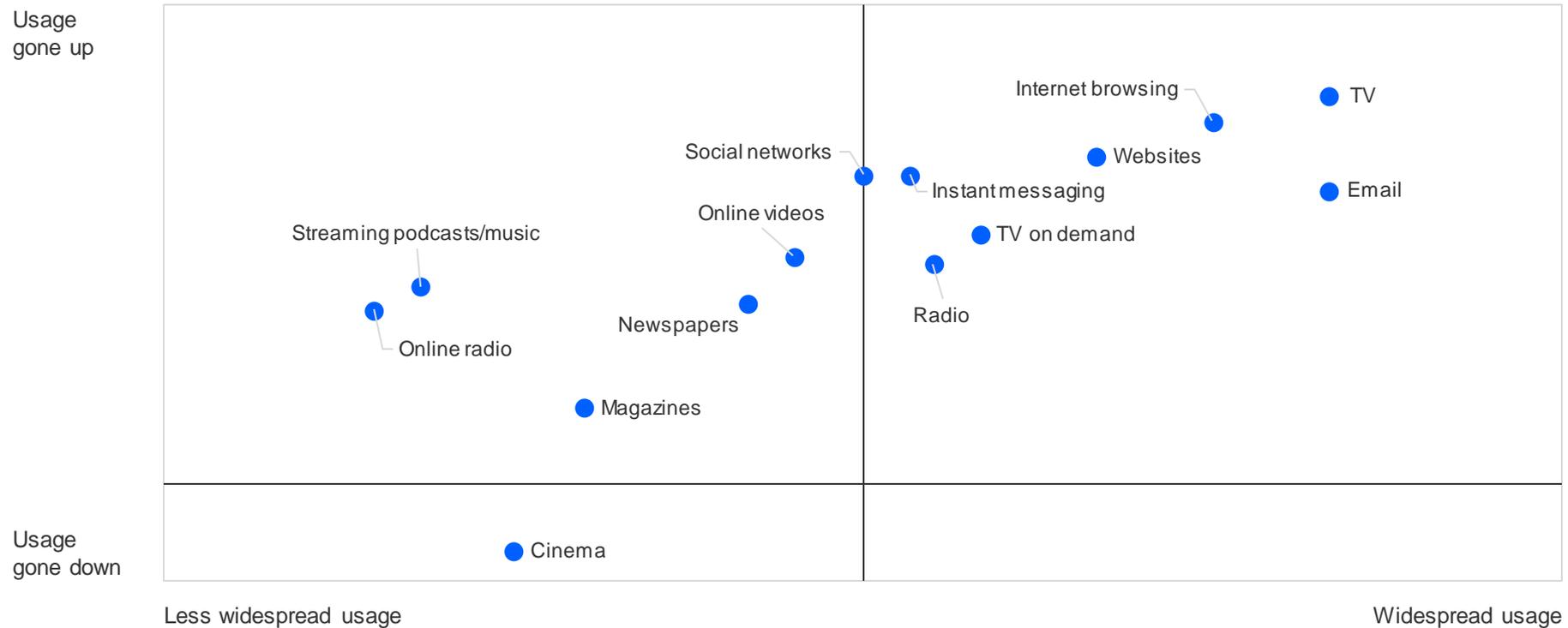
We have high expectations from companies to fulfil their responsibilities as employers and in the wider community

What should companies do in this moment?



We are consuming more media – communications that cut through the clutter are more important and challenging than ever

Claimed Media Usage (past month):



We don't want brands to stop advertising but it mustn't be seen as exploitative or insensitive

Brands should:



30%

Be practical and realistic and help consumers in their everyday life



22%

Use their knowledge to explain and inform



18%

Reduce anxiety and understand consumers' concerns

Advertising should:

The marketing response to COVID is opportunistic. A car park I used once emailed me.

NOT exploit coronavirus to promote a brand 60%

Use a **reassuring** tone 69%

Inform about their efforts to face the situation 69%

Show how they can be **helpful** in the new everyday life 66%



The resulting impact – strong brands lead the way – but be mindful of tone



Getty Images

Style

Givenchy, Dior, and More LVMH Brands to Make Hand Sanitizer to Combat Spread of COVID-19

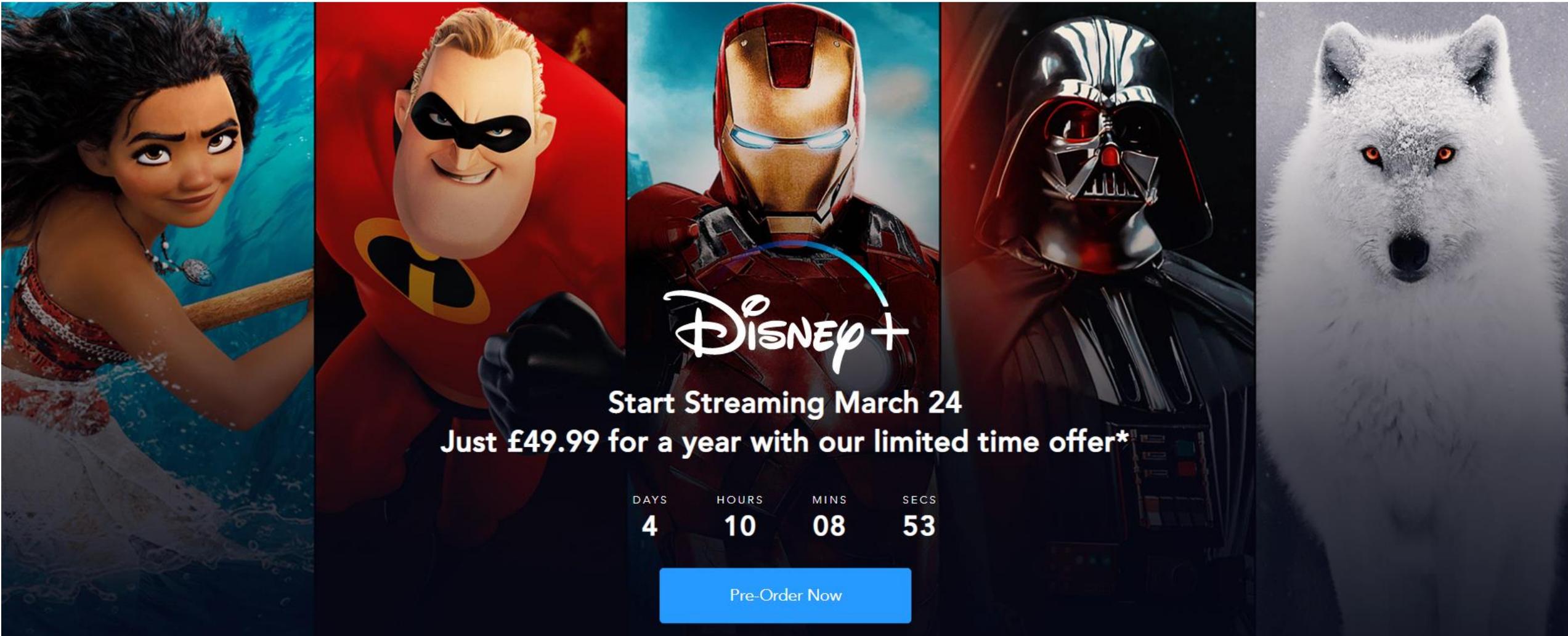
The French conglomerate announced its perfume and makeup factories will produce hydroalcoholic gel to prevent a shortage of hand sanitizer.



Be humorous (if appropriate and in your brand DNA)



Be relevant



Start Streaming March 24
Just £49.99 for a year with our limited time offer*

DAYS	HOURS	MINS	SECS
4	10	08	53

Pre-Order Now

Stand strong and stay true to your roots

Get the facts. Be **DRINKAWARE** <
Visit drinkaware.ie

EVEN APART, WE STAND TOGETHER.

**GUINNESS IRELAND IS PLEDGING
€1.5 MILLION TO SUPPORT
IRISH BAR STAFF AND
OUR ELDERLY CITIZENS.**



GUINNESS

**HAPPY ST. PATRICK'S DAY.
A TIME FOR US ALL TO COME
TOGETHER IN SPIRIT,
EVEN IF WE'RE APART.**



GUINNESS

drinkaware.co.uk
for the facts

Longer Term Implications



Digital Importance

A digitized business model, giving brands the ability to measure, predict, react and recoup will become the norm

Brands that do not understand how to market in a digital world will fall behind



New Behaviours

Widespread changes in consumer behaviours, ranging from work at home, new travel preferences, and the role of entertainment and family are likely to be seen

Brands need to have systems in place to change at the pace that consumers are changing



Human First, Fearless Leadership

Optimism and highlighting of emotional benefits of brands for the betterment of a community will be valued in the long term

Brands that take a human centric, fearless and bold category leadership will be noticed and valued

And let's remember where we started

Changing behaviour may be irreversible...

Adapt to the new situation ASAP

A “New Normal” is gradually forming...

Optimise online experiences to build desire

New voices and new concerns are raising...

Redefine your strategy in the new context

We are here to help – additional resources and further content

There is a huge amount of content on [Kantar.com/inspiration/coronavirus](https://www.kantar.com/inspiration/coronavirus)

Our **C19** barometer understanding the impact for brands is running in c.40 markets

Access our **Covid-19 daily news alert**, launching early next week

Public Opinion in G7 - Weekly study into the public's personal response

Global Monitor ongoing cultural insight

Weekly webinars – look out for invitations

KANTAR

Welcome

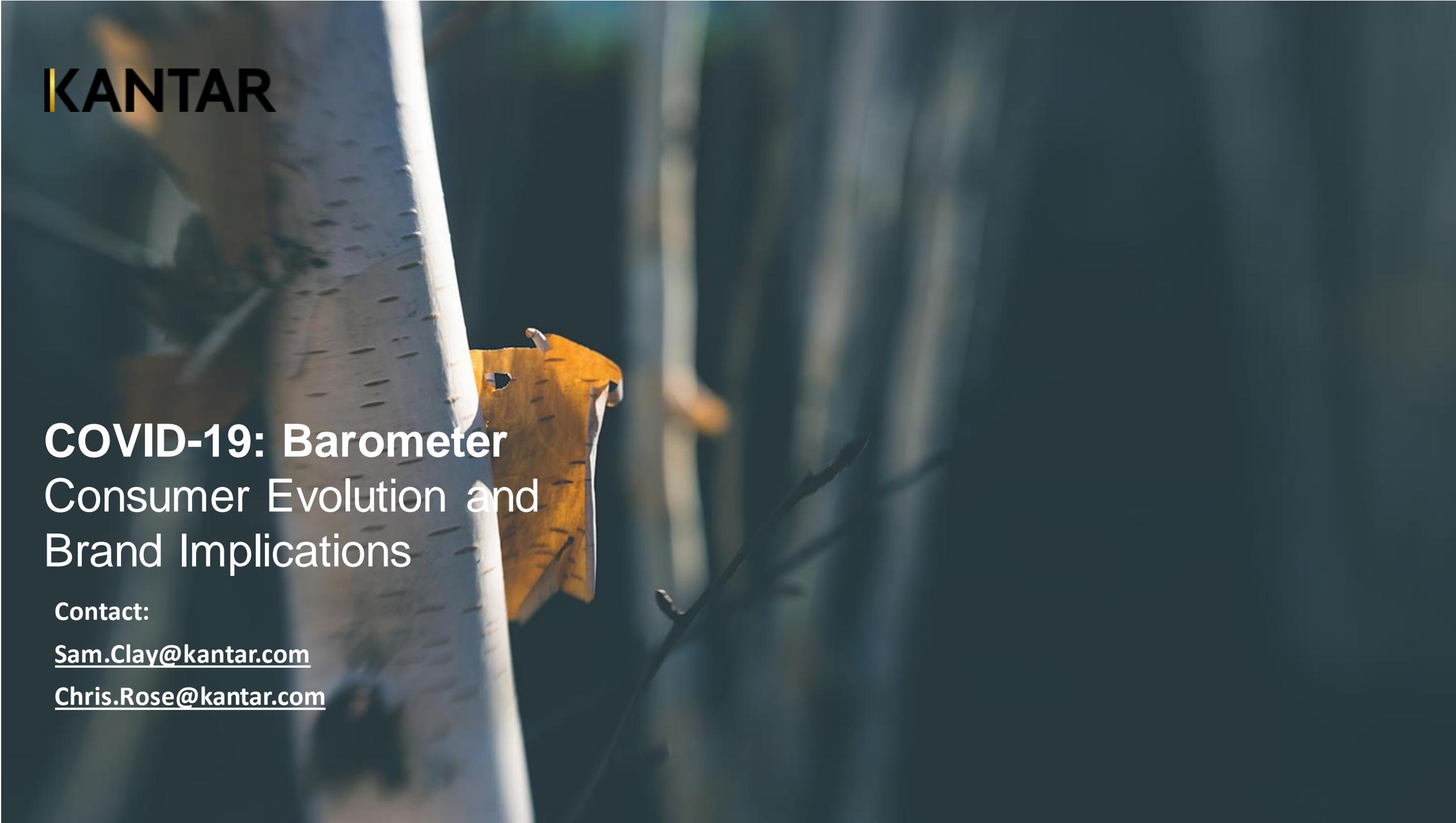
Jane Bloomfield
Chief Growth Officer
Kantar UK





Appendix

Data Sources Used



KANTAR

COVID-19: Barometer Consumer Evolution and Brand Implications

Contact:

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Kantar's C19 Barometer is the leading study on how Covid-19 is influencing consumer's behaviours, attitudes and expectations

Across over 30 markets and over 25,000 consumers

As the largest study of it's kind exploring the brand implications of Covid-19, we're continuing to dive deeper on an expanding list of countries*

Argentina

Belgium

Brazil

Canada

Chile

China

Colombia

Czech Republic

Ecuador

France

Germany

Greece

Hungary

Israel

Italy

Mexico

Netherlands

Nigeria

Peru

Poland

ROI

Romania

Saudi Arabia

Slovak Republic

South Africa

South Korea

Spain

Turkey

UAE

UK

Ukraine

USA

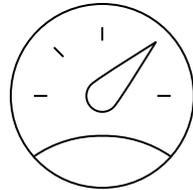
*Given the changing nature of the situation we're facing, we are continuously adjusting the list of countries covered. To get the most up-to-date list of countries, please reach out to your local Kantar contact.

Kantar's C19 Barometer has been designed to help you lead the reaction that your business needs to take, in the coming weeks and months



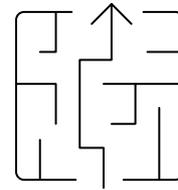
A consistent message

Use data to help your business align around a consistent understanding of the situation, and be clear on what the signal is in an increasing pool of noise.



Short and long term implications

Clearly outline the brand implications and marketing levers that your business should be adopting, in both the short and long term.



Make the right decisions

With different dynamics in each country, use the broad range of country data to help your local teams address their local situation in exactly the right way.



Predict what's coming

With countries in different stages, use cross-comparisons between countries to anticipate what future consumer behavior and expectations may be.

The study will initially unpack the business questions we are currently facing

Consumer attitudes

- Level and nature of concern
- Trusted sources of information
- Areas of advice sought

Media habits:

- Impact on media channel usage
- Impact on social media usage

Travel habits:

- Impact on transport types**

Impact on online/offline purchase behaviour:

- Channel (online/offline, store format)
- Price/promotion sensitivity
- Stockpiling
- Product origin
- Willingness to use electronic payments
- Categories affected by online purchase behaviour*
- Attitudes to online purchase behaviour

Expectations from brands

- Appropriate perspective on the situation
- How they should communicate
- Tangible actions to take

And more...

Kantar interviewed 485 people aged 18+ in the UK during the weekend of 13th-16th March. They were interviewed online and were nationally representative in terms of age, sex and region.

Context:

COVID-19 had been in community transmission phase for over a week, with confirmed cases climbing from 798 to 1543 (and deaths from 11-55) over the weekend.

UK Government advice remained in its Contain phase until late on the 16th, with no significant restrictions imposed beyond guidance to practice good hygiene and social distancing to minimise risk to vulnerable groups.



CORONAVIRUS GLOBAL **STAN** LANDSCAPE

*DEPLOYING KANTAR'S ANALYTICS AI
TOOLKIT AND EXPERTISE TO HELP BRANDS
NAVIGATING THROUGH THE UNKNOWN*

March 11, 2019

STAN - SUPERCHARGING HUMAN INTELLIGENCE THROUGH AI

KANTAR





CONSUMER GENERATED CORONAVIRUS CONVERSATION

Our defined universe

Query based on: Coronavirus related consumer conversations in English

Country: United States, United Kingdom, Australia, Canada, India, Germany, France, Italy, Spain, Denmark, Switzerland, Austria

Personal narrative applied to reflect voice of consumer

Size of the universe: 89+ million

Timeframe: Last 6 months

Sources: Twitter, Facebook Public, Tumblr, YouTube, Blogs, Comments, Forums, Microblogs, Consumer Reviews, Professional Reviews, Other Social Networks,

Sampling: 10%Twitter, 100% all other sources

Metrics used: Volume of conversation, Growth, Priority score

Search data to be appended

Category and Market Factors

Assess the saliency of your category within consumer generated coronavirus conversation.

BUSINESS IMPACT
Brands & Categories

Covid-19 Consumer Conversations
+89M and counting....

Consumer Factors

Understand consumer behaviours in light of the global virus outbreak and crisis.

CRISIS BEHAVIOURS

Gain insight into how to communicate with consumers and the topics to emphasise in uncertain times.

ACTIVATION Comms strategies

Understand what consumers are trying to achieve
Identify emotional and functional consumers' needs

FEELINGS AND MOTIVATIONS

PUBLIC OPINION
on
Government/
other
institutions
response

CONCERNS
Marketplace & Consumer

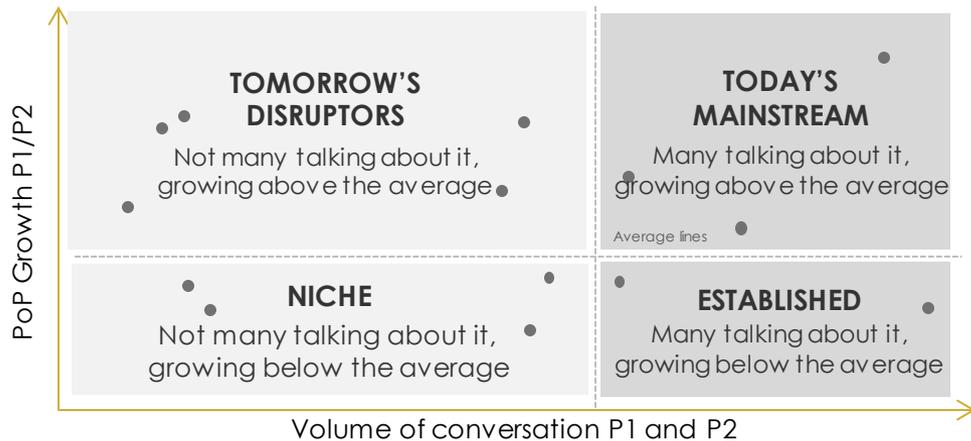
Discover consumer and marketplace concerns of today and the growing concerns of tomorrow.

Key metrics to define- trend detection

STAN

Trends analysis

We **uncover trends** using data by running advanced statistical analysis on the data



Priority score

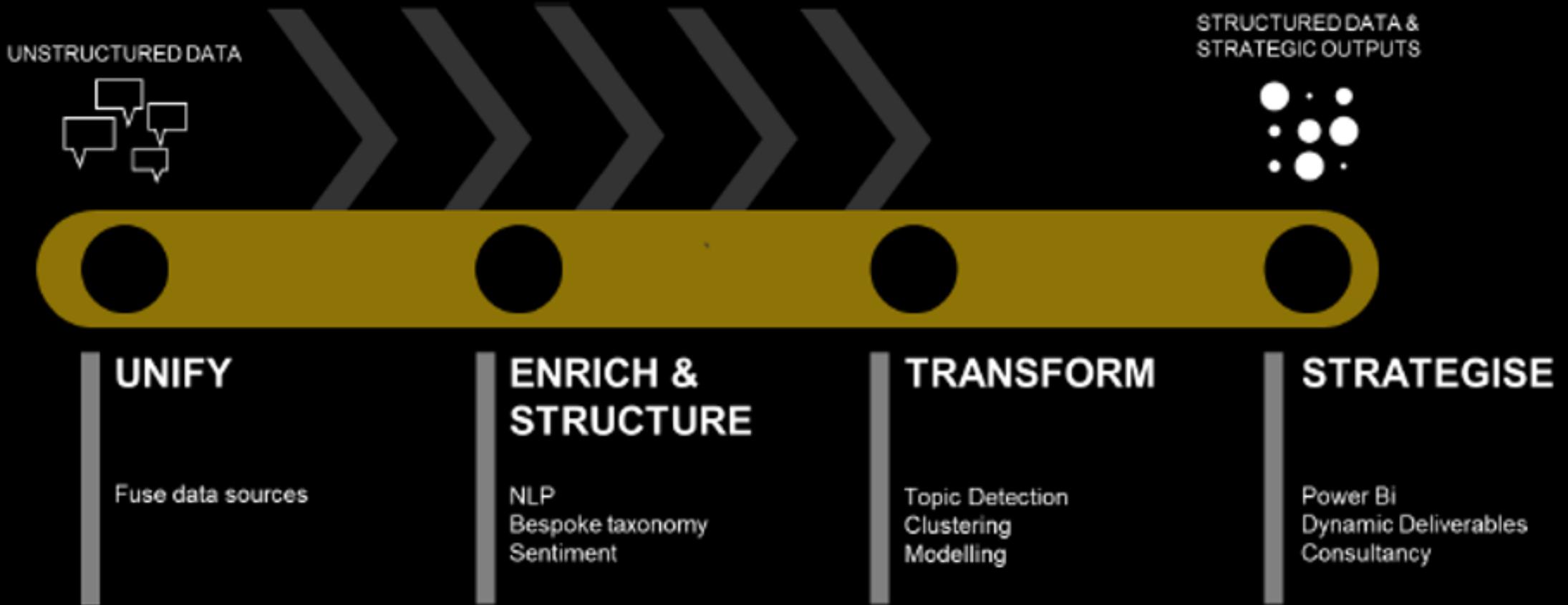
To determine which trends to prioritise, we calculate a priority score

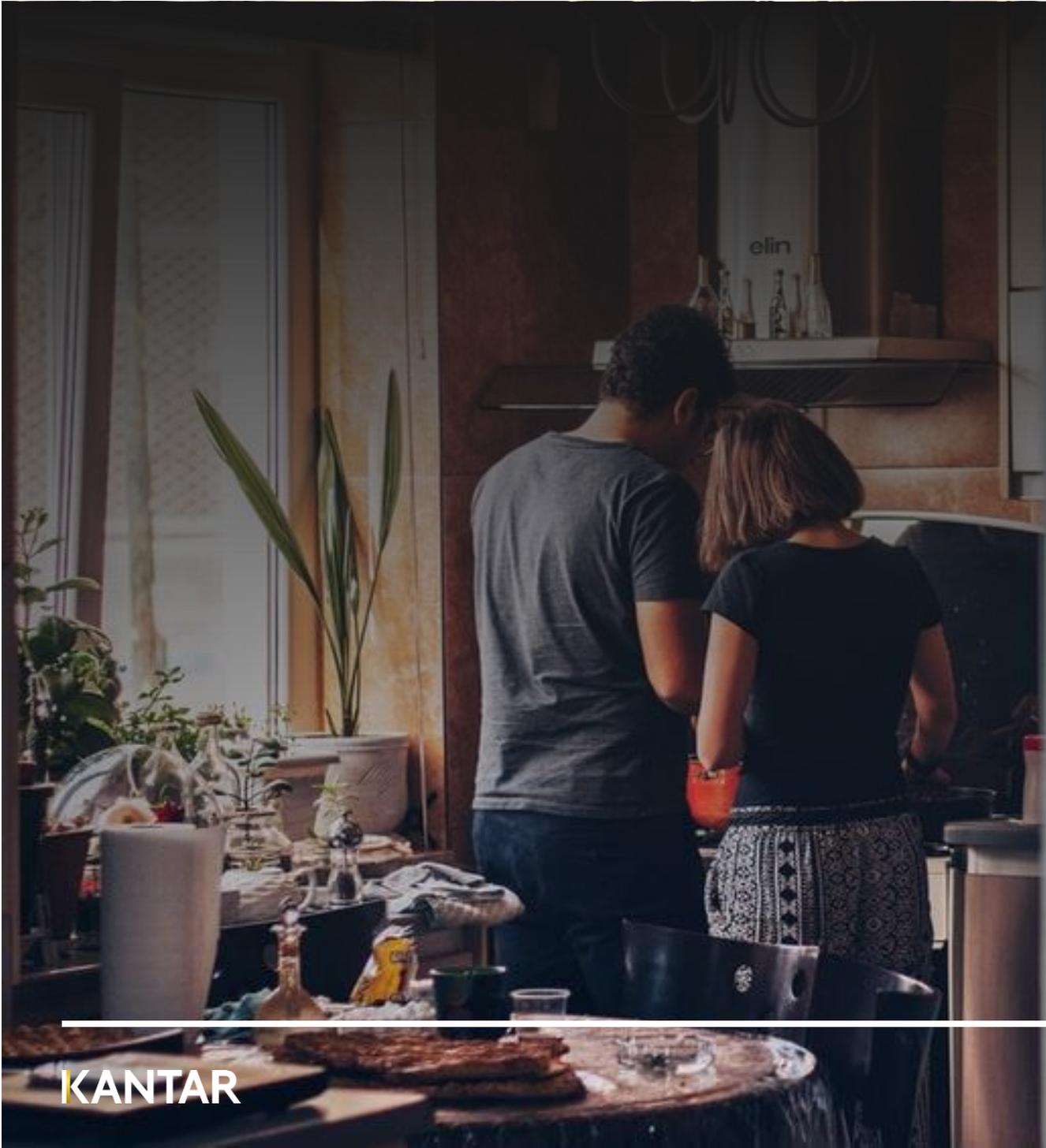
Volume * Growth

Illustrative example: Energy
volume (11,234) * growth
(30%) = **3,370.20**



STAN moves you from data to business impact





Understanding our
changing reality as it takes
shape

EVA

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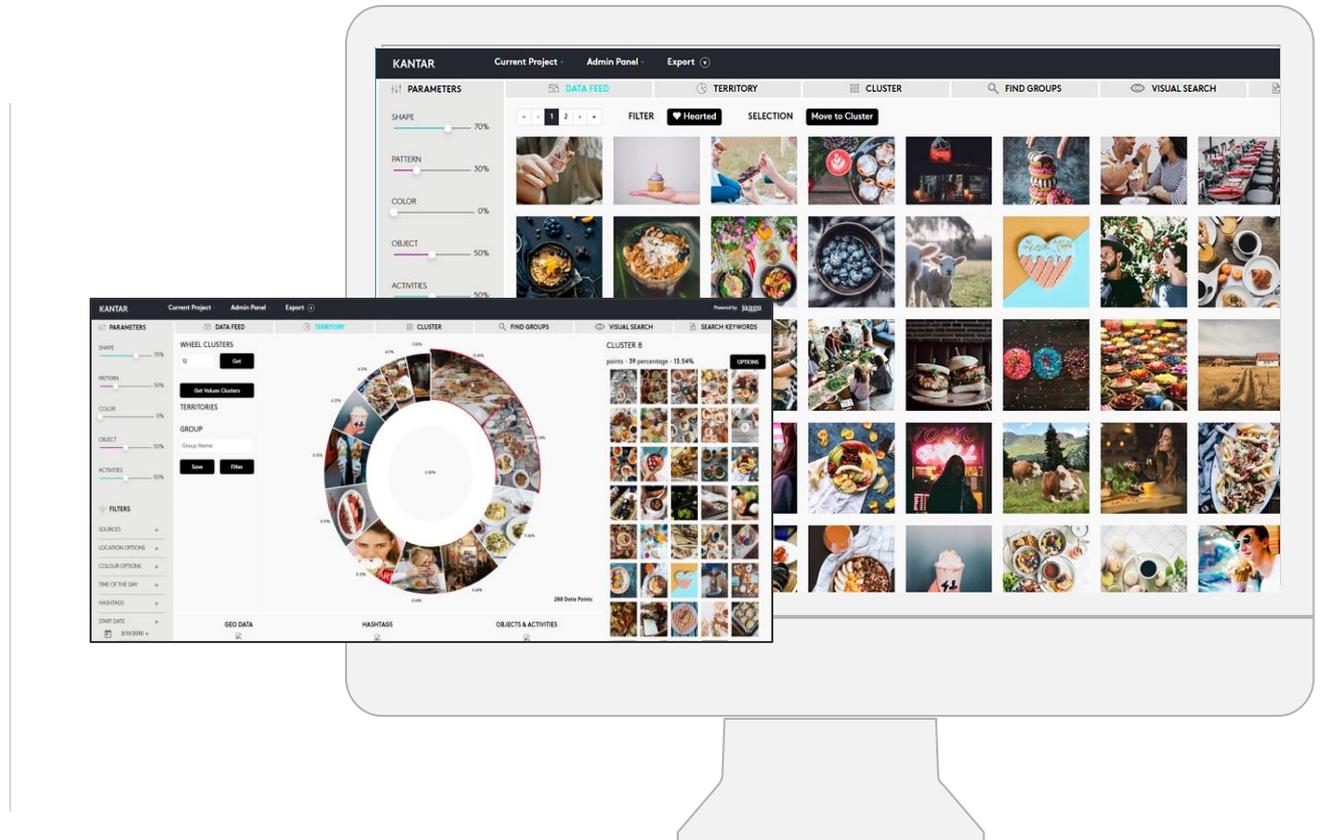
What we did: Using EVA to understand what people are really getting up to in self isolation

How we did it:

We are conducting an ongoing exploration of social distancing and self-isolation using EVA, our unique image analytics platform developed by AI specialists and cultural insight experts.

- So far we have analysed a sample of 8,700 Instagram posts, posted w/c 9th March. These posts were gathered tracking 6 widely used hashtags in UK, US & Italy: #quarantine, #selfisolation, #selfquarantine,, #iorestoacasa, #quarantena, #smartworking, #isolamento
- These were clustered by EVA's image recognition technology to reveal the big codes and themes around the topic
- We then analysed these themes to understand what they could mean for brands

EVA is a fully GDPR compliant tool. For the purposes of this presentation, user images have been replaced with representative stock images or images recreated by Kantar staff that bring the themes and images we saw to life.

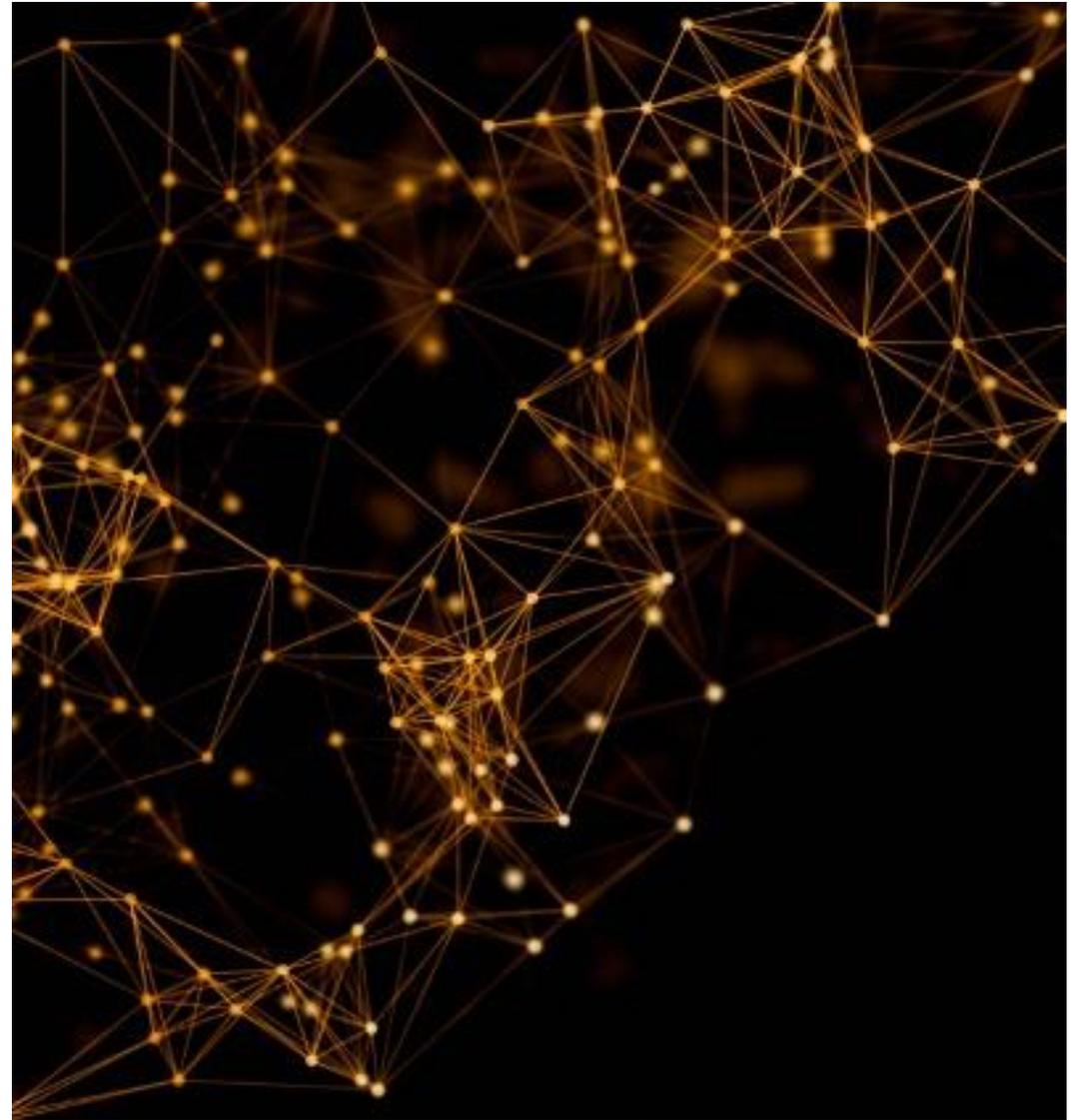


EVA can help you understand what is happening in your consumers' worlds and respond at speed.

EVA – Enhanced Visual Analytics – can help your brand understand:

- How your consumer tribe is responding to the crisis, and the new behaviours and needs they have
- How approaches to your brand or category are changing and how the role of your brand or product is changing behind closed doors
- How new opportunities and challenges are emerging as people adapt to a radically changed reality.

...so you can adapt how you interact with consumers and the products and services you offer to them to meet their new needs.



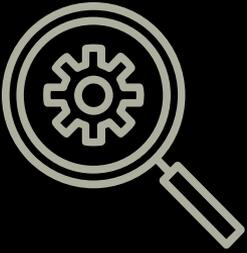
GLOBAL MONITOR

WHAT IS IT?

Contact:
jennifer.james@kantar.com

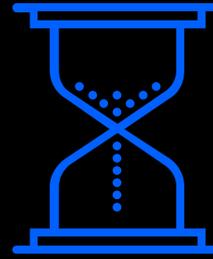


From the world to the consumer



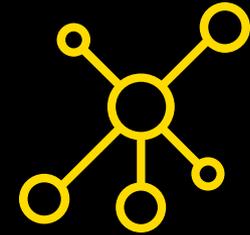
UNDERSTAND

A total consumer view and penetrating insights about your target consumers



ANTICIPATE

An ongoing flow of provocations and insights into key drivers of change and emerging consumer needs and values



SHAPE

Ongoing, on-demand guidance to shape key marketing and planning initiatives

Our approach

Differentiated perspectives



ROBUST ATTITUDINAL & QUANTITATIVE DATA

Our quantitative studies drill into the attitudes, values and priorities of consumers around the world

A NETWORK OF CULTURAL CORRESPONDENTS

Our network of Streetscapers and our team of consultants scour the globe for new innovations and trend manifestations

SUPPLEMENTED WITH SECONDARY RESOURCES

We utilize key secondary data resources, social listening and other AI powered insights platforms

ENHANCED BY INTERNAL AND EXTERNAL EXPERTS

We leverage a variety of thought leaders, futurists and category experts

The importance of strong brands

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166k
BRANDS

454
CATEGORIES

51
MARKETS

3.7m
CONSUMER
INTERVIEWS

BRANDZ

THE LARGEST
Brand Building Platform
In The World

5.2B
DATA POINTS

Est. 1998

BrandZ valuation process is the only one to incorporate comprehensive consumer data



X



=



STEP 1:
Financial Value
(\$)

Financial value
created by a brand

Source:
Bloomberg
KANTAR

STEP 2:
Brand Contribution
(%)

Proportion of financial value
generated by the brand's ability to
increase purchase volume and
charge premium

Source:.
BRANDZ

STEP 3:
Brand Value