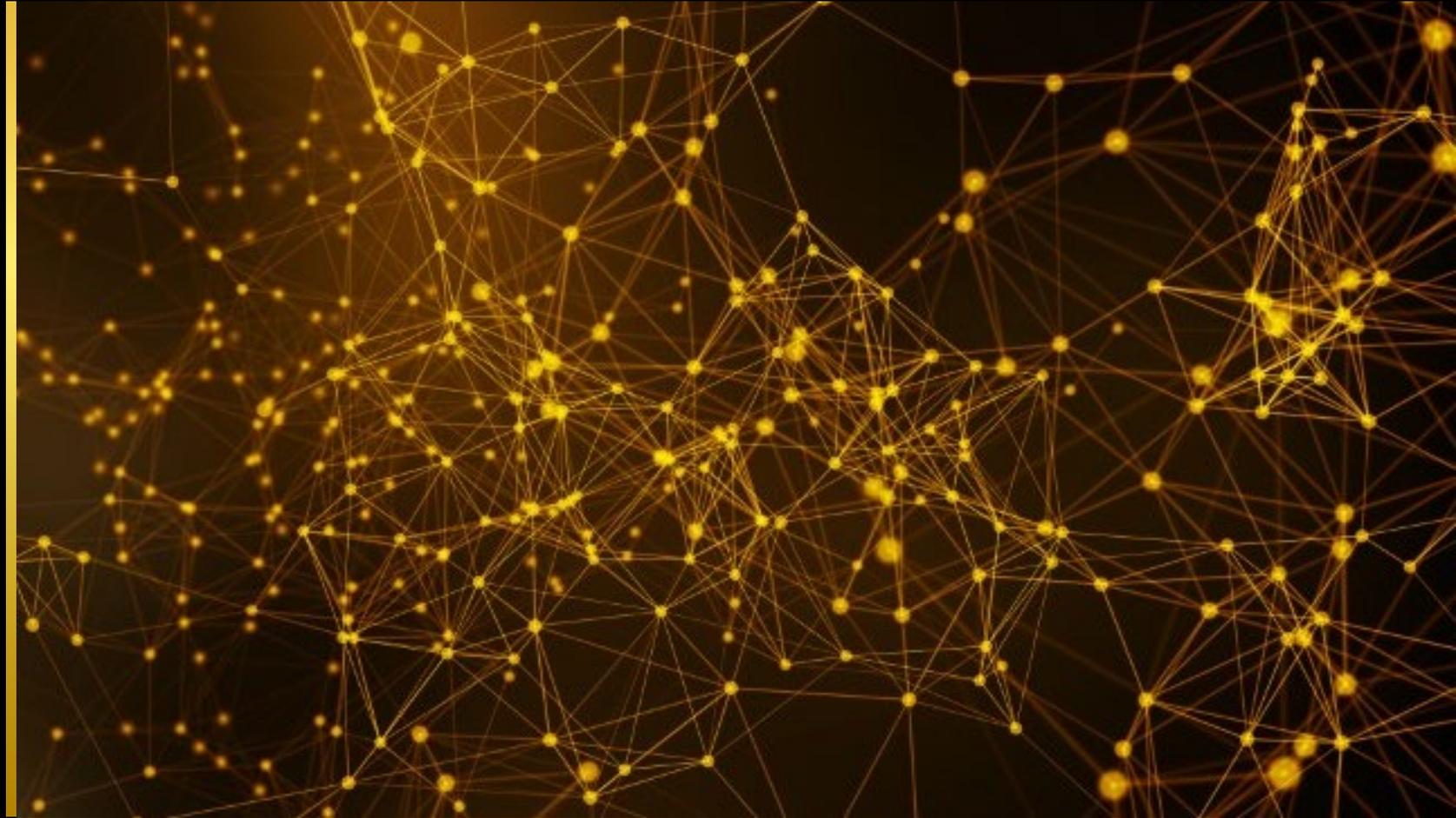


KANTAR

Are you still in sync
with the drivers of
your brand that
deliver growth?

An Analytics enhanced approach

September 3rd



Your speakers today



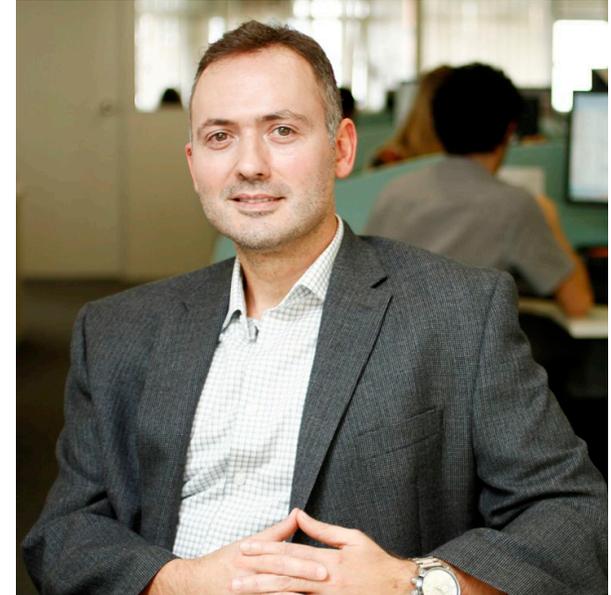
Bram van Schaik

CEO
Kantar Insights Division
Netherlands



Gerben Vos

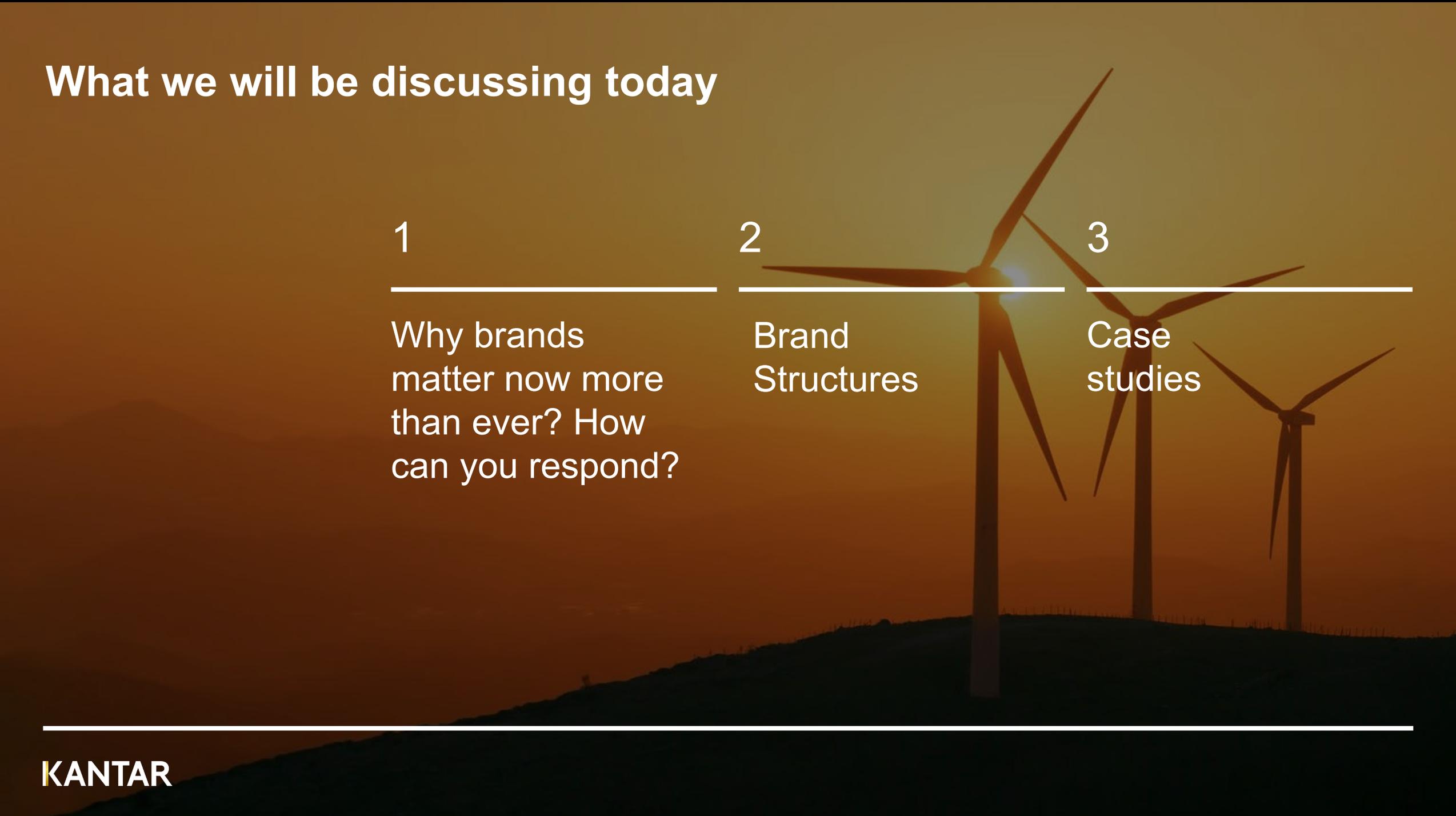
Sr. Research Executive
Kantar Insights Division
Netherlands



Mauro Fusco

Head of Analytics & Data Strategy
Kantar Insights Division
Europe

What we will be discussing today

The background of the slide features a silhouette of three wind turbines against a warm, orange-hued sunset sky. The turbines are positioned on a dark, rolling hill. The overall aesthetic is clean and modern, with a focus on the central text.

1

Why brands matter now more than ever? How can you respond?

2

Brand Structures

3

Case studies

Agenda

1

Why brands matter now more than ever? How can you respond?

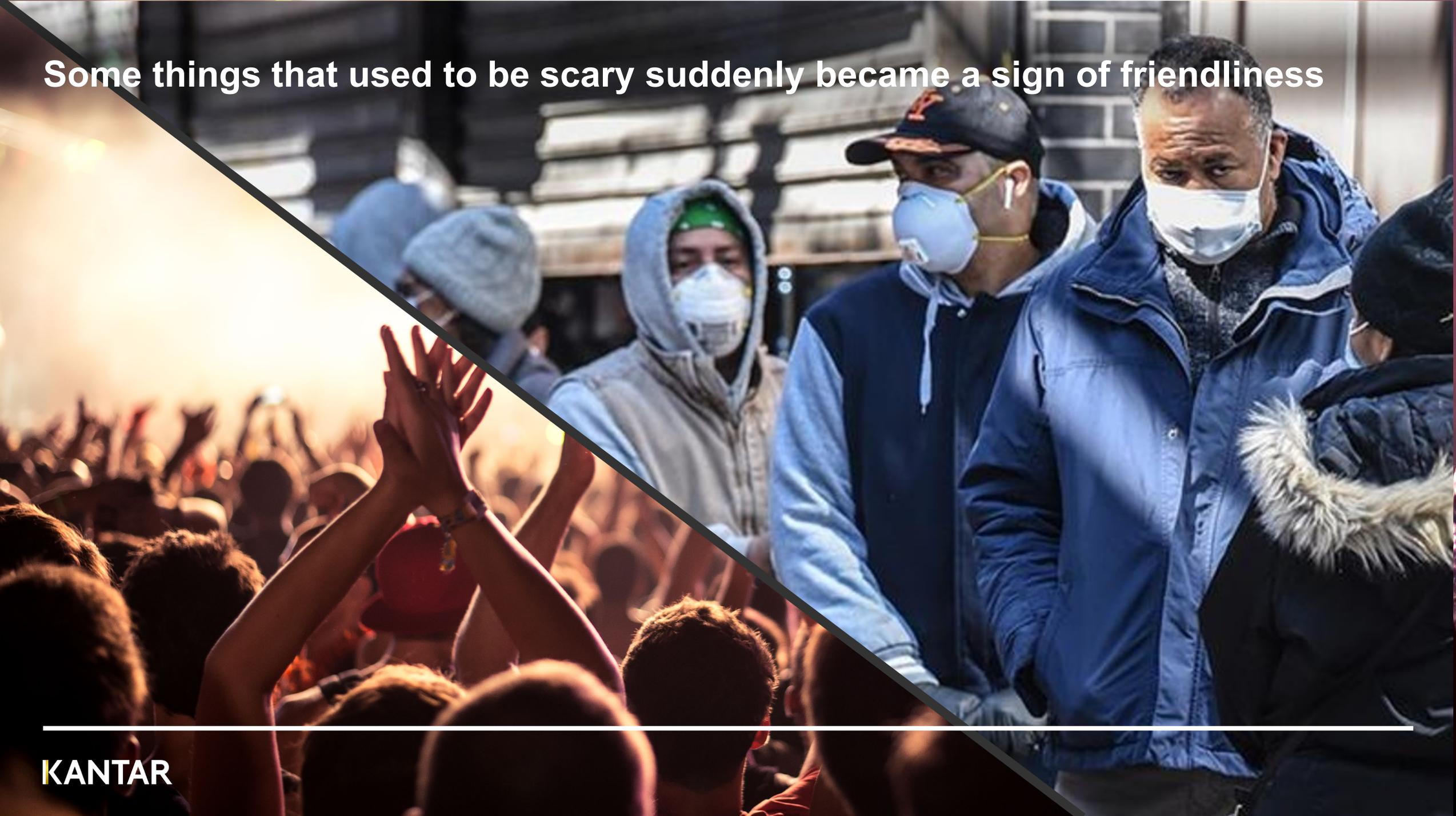
2

Brand structures

3

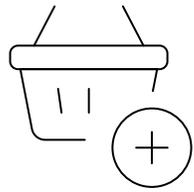
Case studies

Some things that used to be scary suddenly became a sign of friendliness



Consumers are preparing to face long term new normal

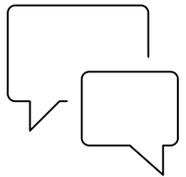
Survival



35%

bought a lot of **extra items to be prepared**

Wave 2

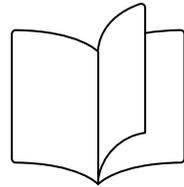


51%

Interested in **advice topic of symptoms**

Wave 1

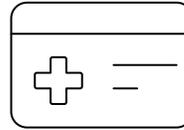
Self sufficiency



40%

are focusing on **personal development**

Wave 5

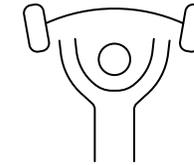


20%

are more likely to **take out insurance**

Wave 6

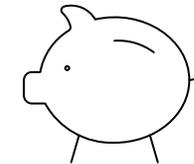
Resilience



34%

18-24yrs old are more prepared for future challenge

Wave 7

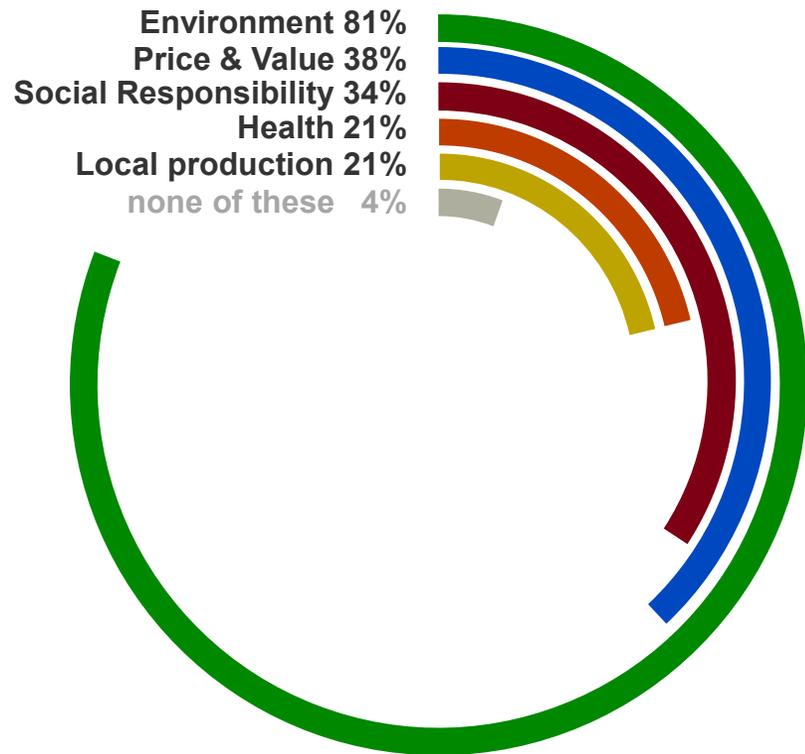


36%

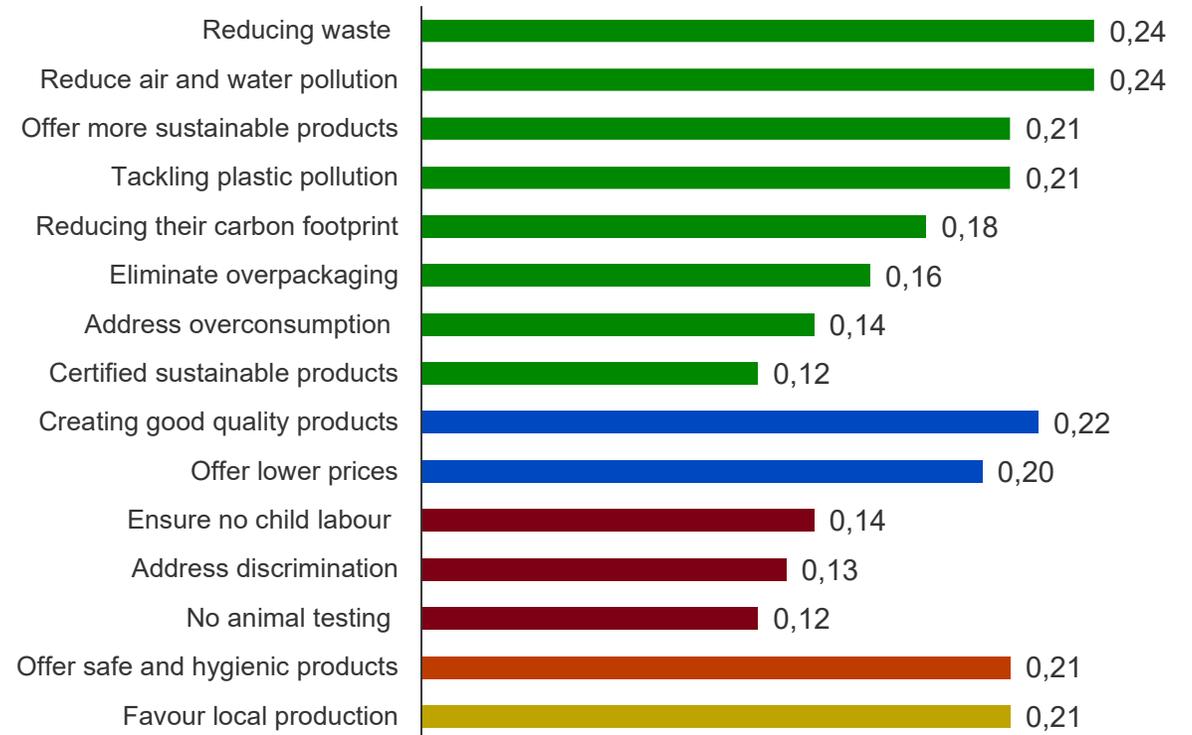
Less likely to **make big purchase**

Wave 6

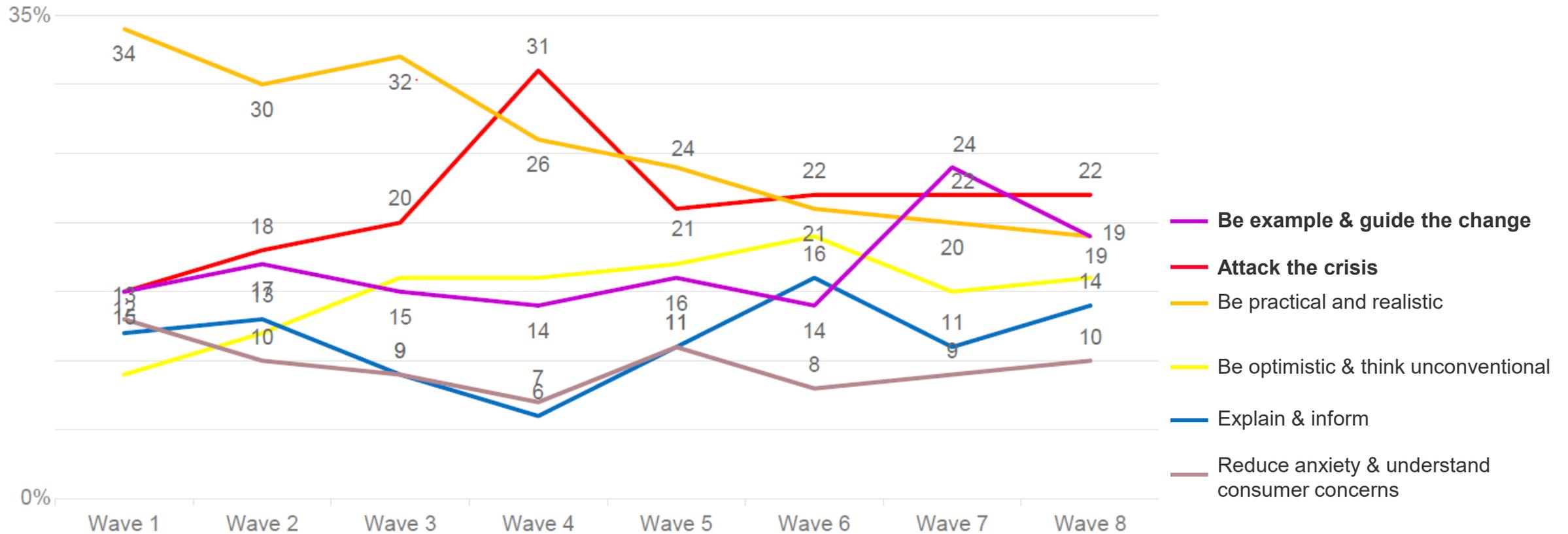
Attention is also shifting to other directions



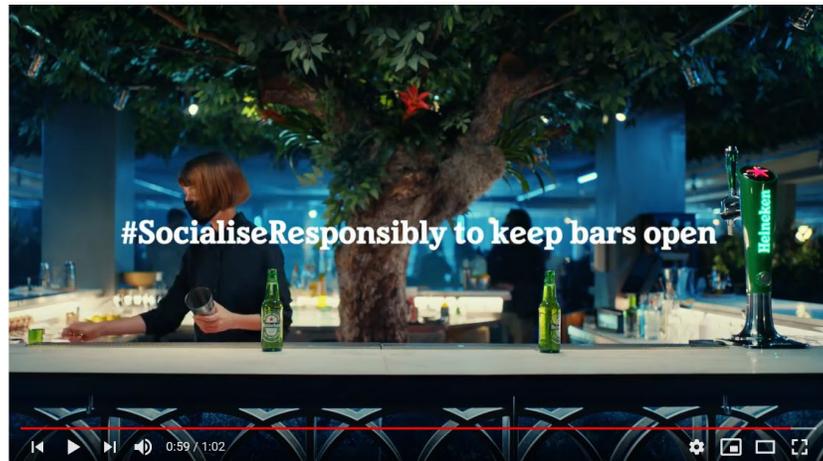
Key issues companies and brands should worry about now (%)



Consumers increasingly expect brands to guide the change



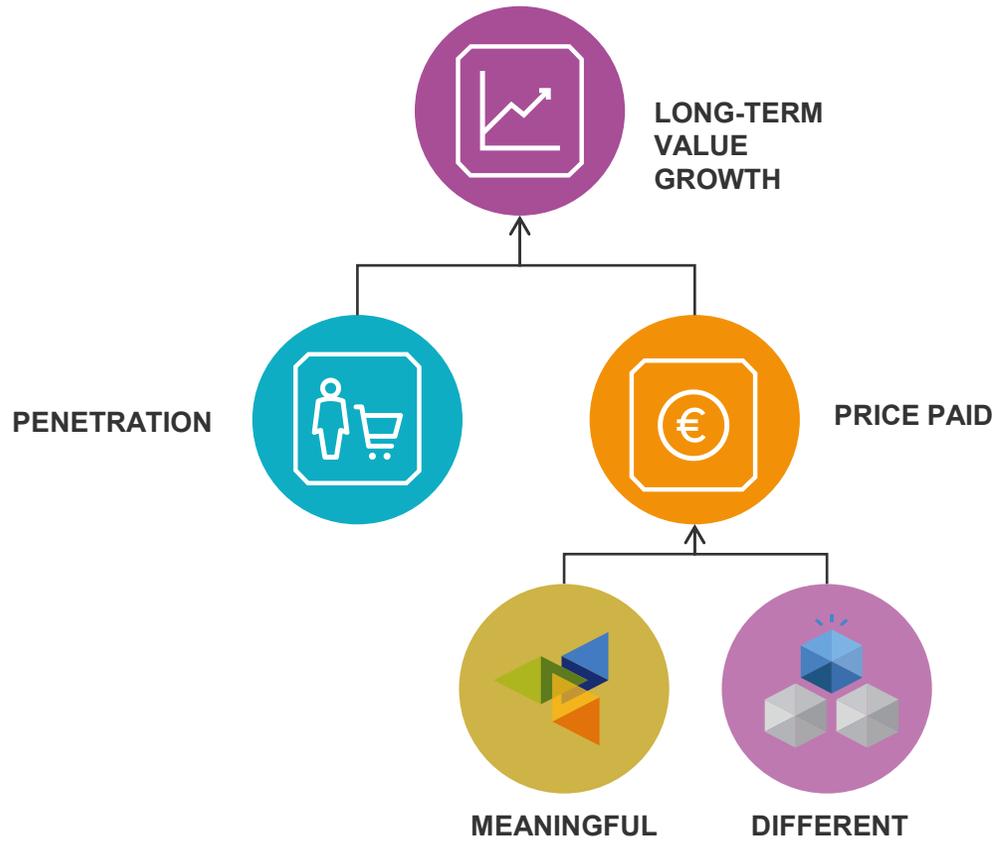
Which is what brands increasingly do



Consumers increasingly expect brands to actively guide positive change

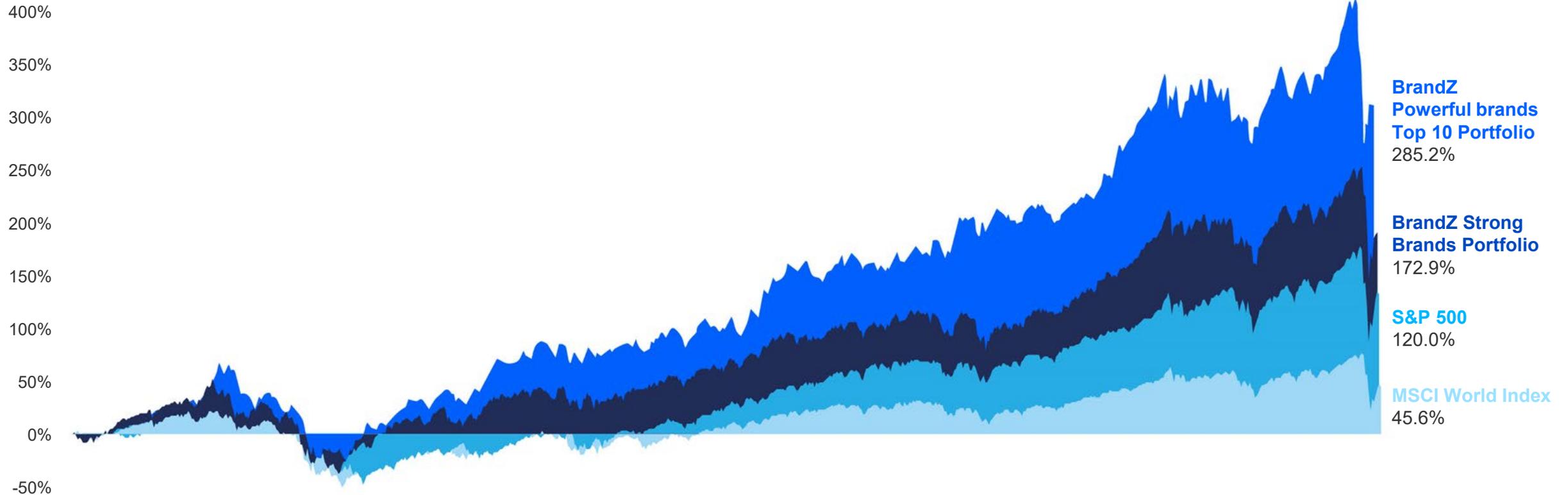
“Should my brand jump on this as well? And if so, how?”

If you want to explain value growth, you will need Salience, Meaning and Difference



BrandZ's strong brand portfolios continue to out-perform the market

BrandZ™ Portfolios vs S&P 500 vs MSCI World (April 2006 - April 2020)



One valuable learning from the global recession of 2008



S&P 500 selection shows us that governance means something



Strong brands
recover more quickly
from recession

3x
quicker

BrandZ™ Strong Brands Portfolio

172.1%

1,5

years

S&P 500

102.0%

MSCI World Index

50.3%

APRIL
2006

APRIL
2007

APRIL
2008

APRIL
2009

APRIL
2010

APRIL
2011

APRIL
2012

APRIL
2013

APRIL
2014

APRIL
2015

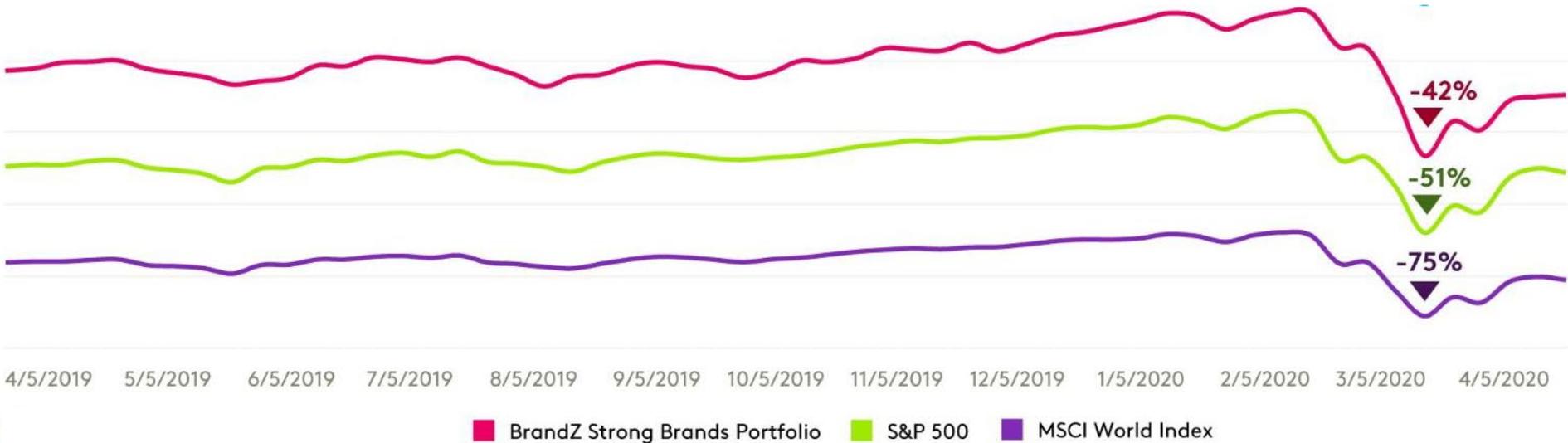
APRIL
2016

APRIL
2017

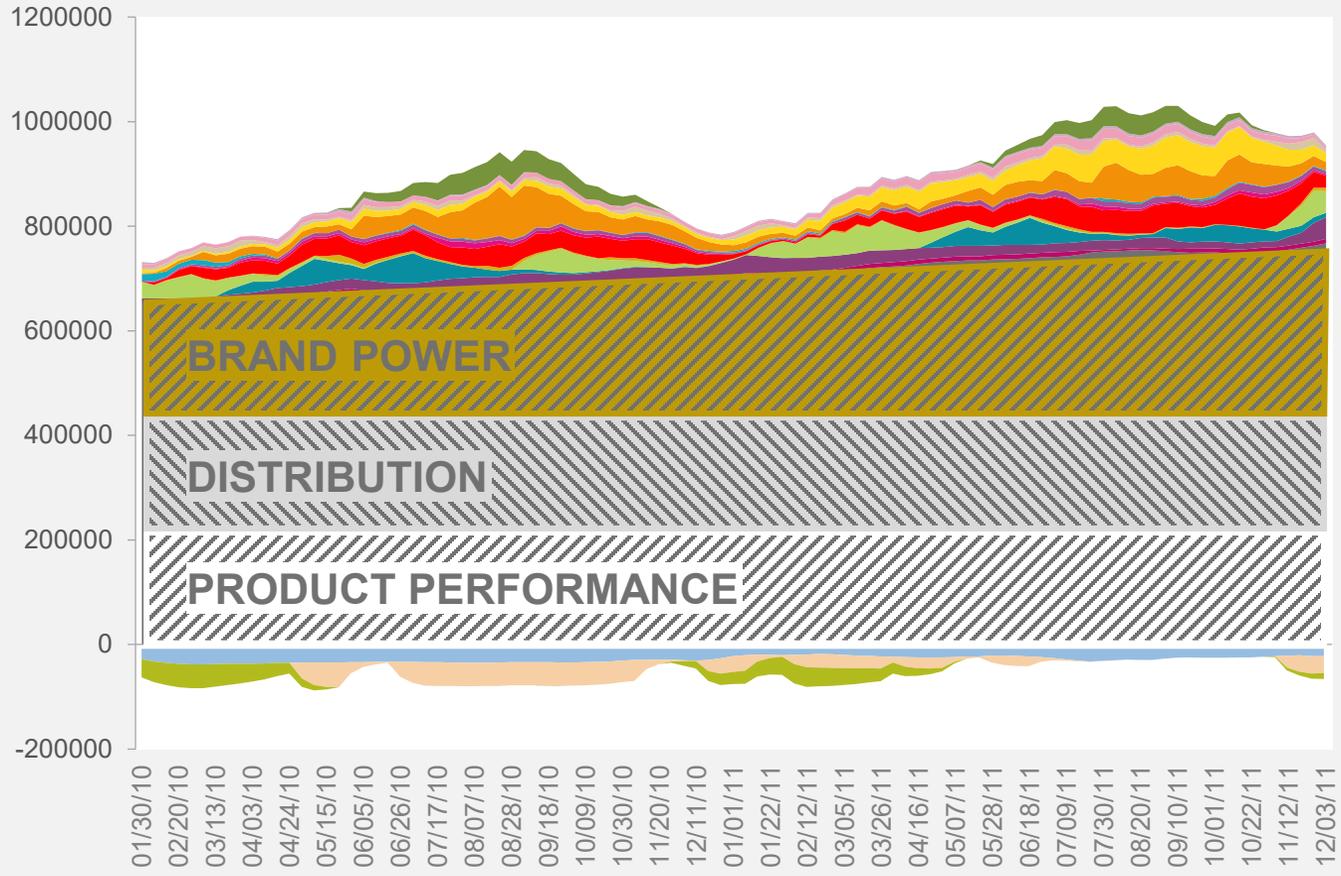
APRIL
2018

Also amidst Covid-19, the BrandZ Strong Brands Portfolio has been better insulated against losses

BrandZ portfolios vs. S&P500 and MSCI World: Last 12 months



And when decomposing sales, brand power is THE driver of long term growth.



BRAND CONTRIBUTION FOR SALES

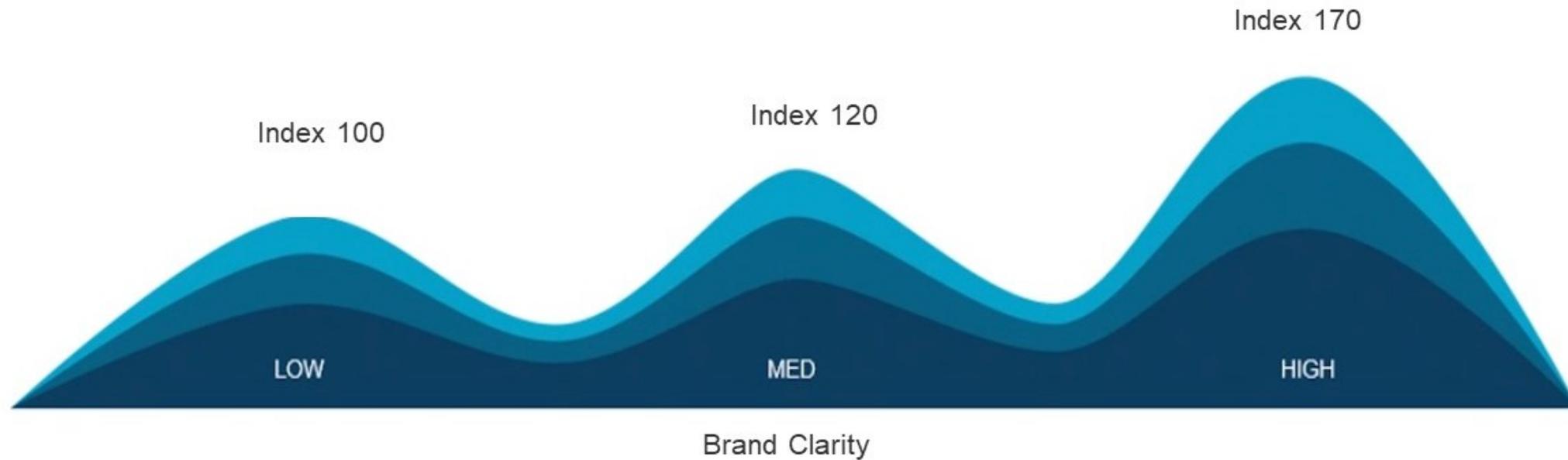
how imagery and brand building contribute for financial turnover

OTHER BASE LEVEL VARIABLES

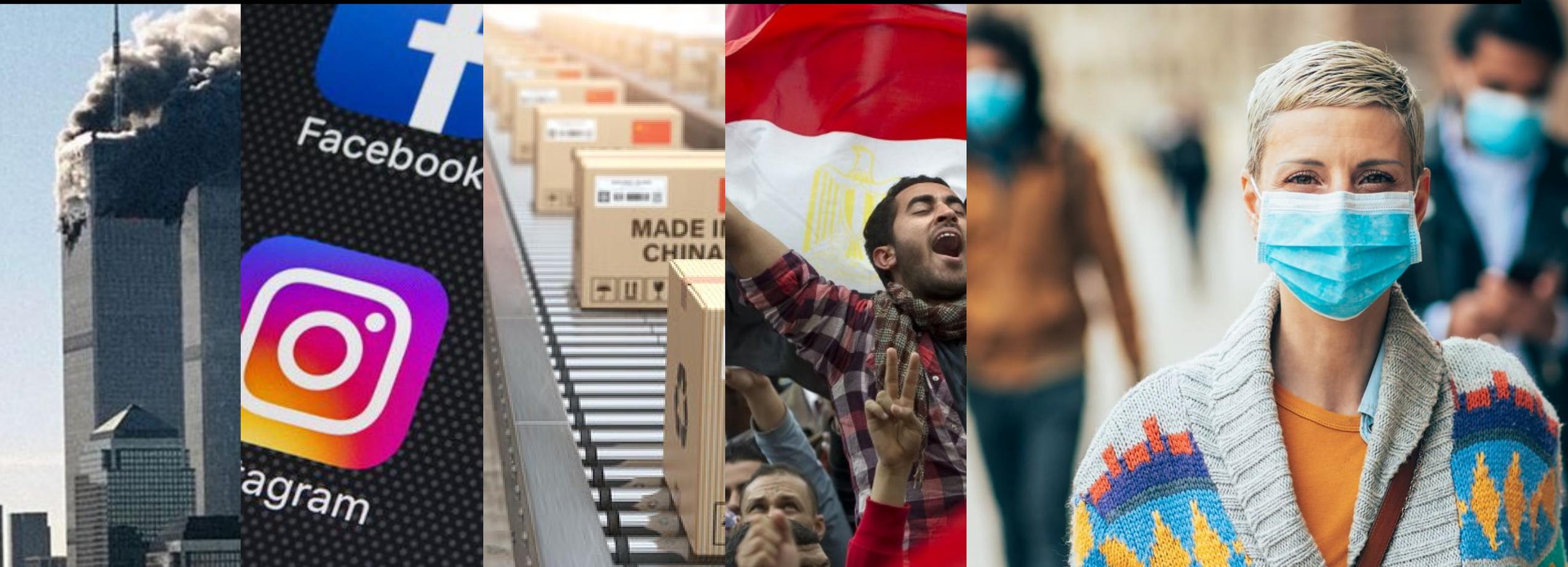
how other structural variables contribute for base sales

To build this brand equity, a consistent brand positioning is crucial.

Brand contribution to sales



Brand related mental structures usually sees modest changes year-on-year



but some significant events produce effects in consumers perception about brands and the elements they prioritize to prefer them

2001

2004

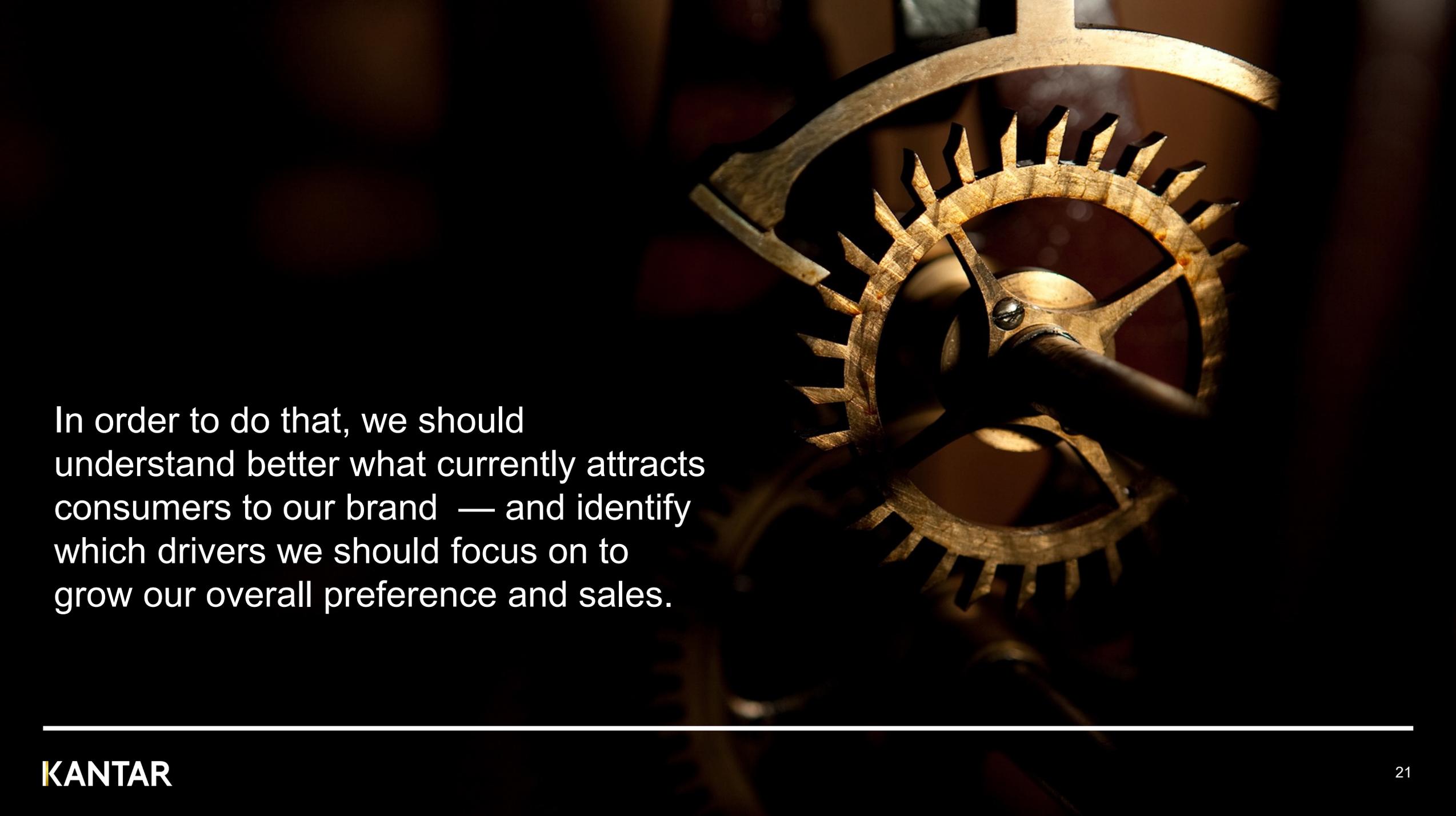
2010

2012

2020

So what do we know?

1. Brand equity matters - driver of long term growth
2. Leading brands across the world are doing better than average in this Covid period
3. The key challenge for brands in a world that is changing faster, is to respond to new consumer needs while maintaining their brand clarity



In order to do that, we should understand better what currently attracts consumers to our brand — and identify which drivers we should focus on to grow our overall preference and sales.

Agenda

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Case studies

A hand holding a colorful umbrella over a field of black umbrellas in the rain. The scene is set against a dark, stormy sky with rain falling. The hand is positioned in the lower right, holding the handle of a vibrant, multi-colored umbrella that stands out from the sea of black umbrellas below. The text is overlaid on the image in white, sans-serif font.

Are you still in sync

with the drivers of your brand

that deliver growth?

Why only prioritizing market's drivers is not enough

Prioritizing the brand assets that best correlate with Brand equity may not totally unlock your brand's full potential

Regular Brand driver decomposition isolates the drivers that correlate the most with brand equity

Nevertheless, it offers some biases that we should look at more carefully

1. It may leave behind important attributes that have to be eliminated from the analysis due to multicollinearity

2. It is normally designed to understand what leverages equity within the category

drivers of equity within category

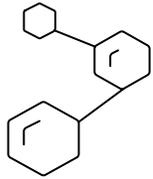


	Ta	Cr	Fi	Co	Af	Gv
Tasty	-	■	■			
Crunchy	■	-	■			
Fills me up	■	■	-			
Convenience				-		
Affordable					-	■
Good value					■	-
...						

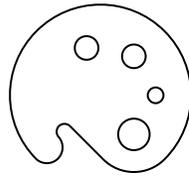


What's behind Brand Structure Analysis

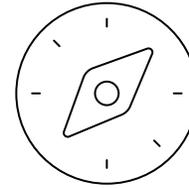
Brand Structures is not a statistical analysis but a program that assesses the whole brand data assets across time and within its competitive context based on advanced statistics



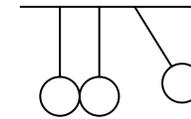
BSA understands the **interactions** between brand associations that creates success to the brand positioning strategy



BSA quantifies the impact of your advertising **taglines** across time



BSA analyses the **territories** that offer best opportunity for the brand to play



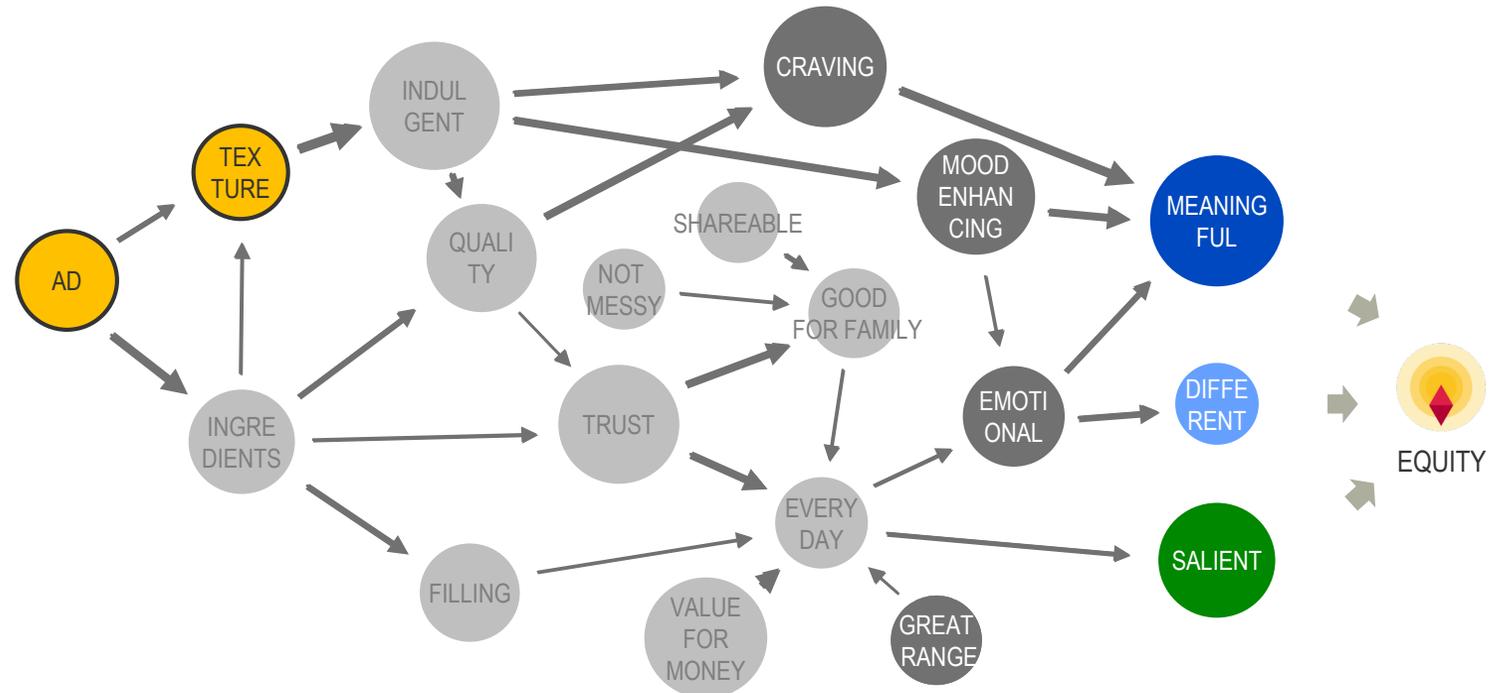
BSA quantifies the brand equity **contribution to sales** and measures the media channels that best convey the brand's messaging

Mapping interactions between brand associations

BSA deploys structural modeling techniques

Equity is a mental structure that makes a brand to be memorable and resonant to consumers

We should never give up an attribute just because it is correlated with another one. That's the main reason we should rather keep them well managed



Iterating most promising territories

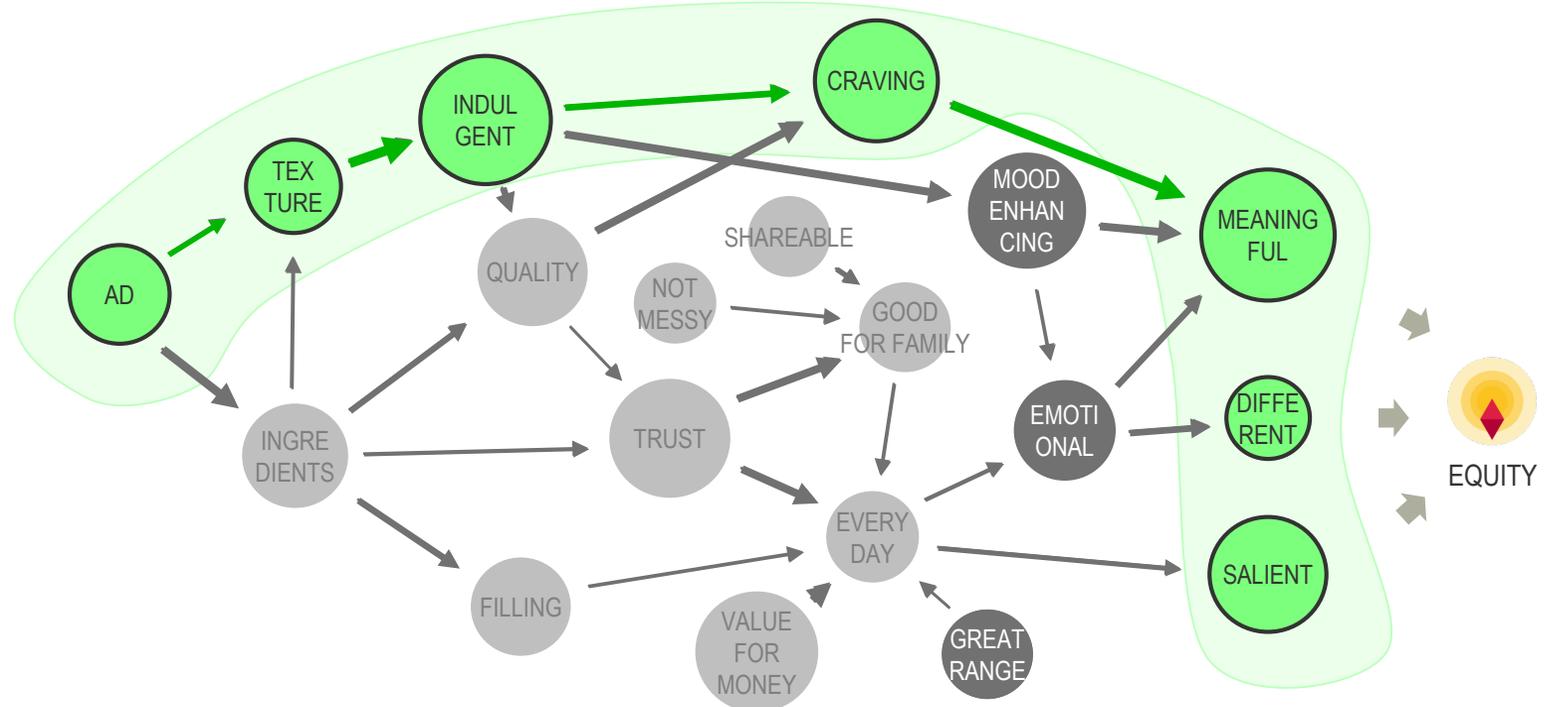
BSA iterates the **pathways** that offer best opportunity for the brand to play

Although some drivers are important; some territories may offer low opportunity to grow

That might be due to

- the brand already owns that attribute
- the brand has little assets to attract those associations to itself
- or because that territory is very well protected by another competitor

pathway A: Satisfying a craving



Iterating most promising territories

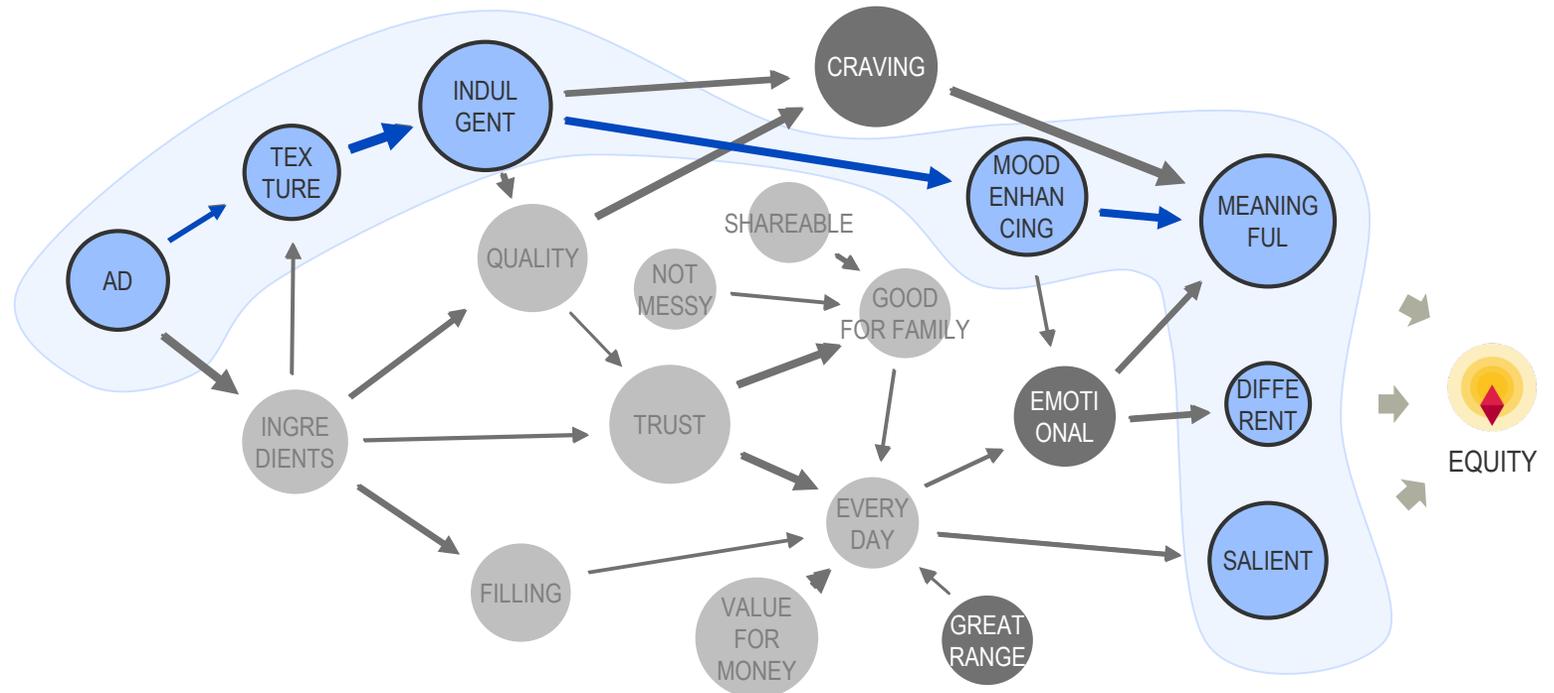
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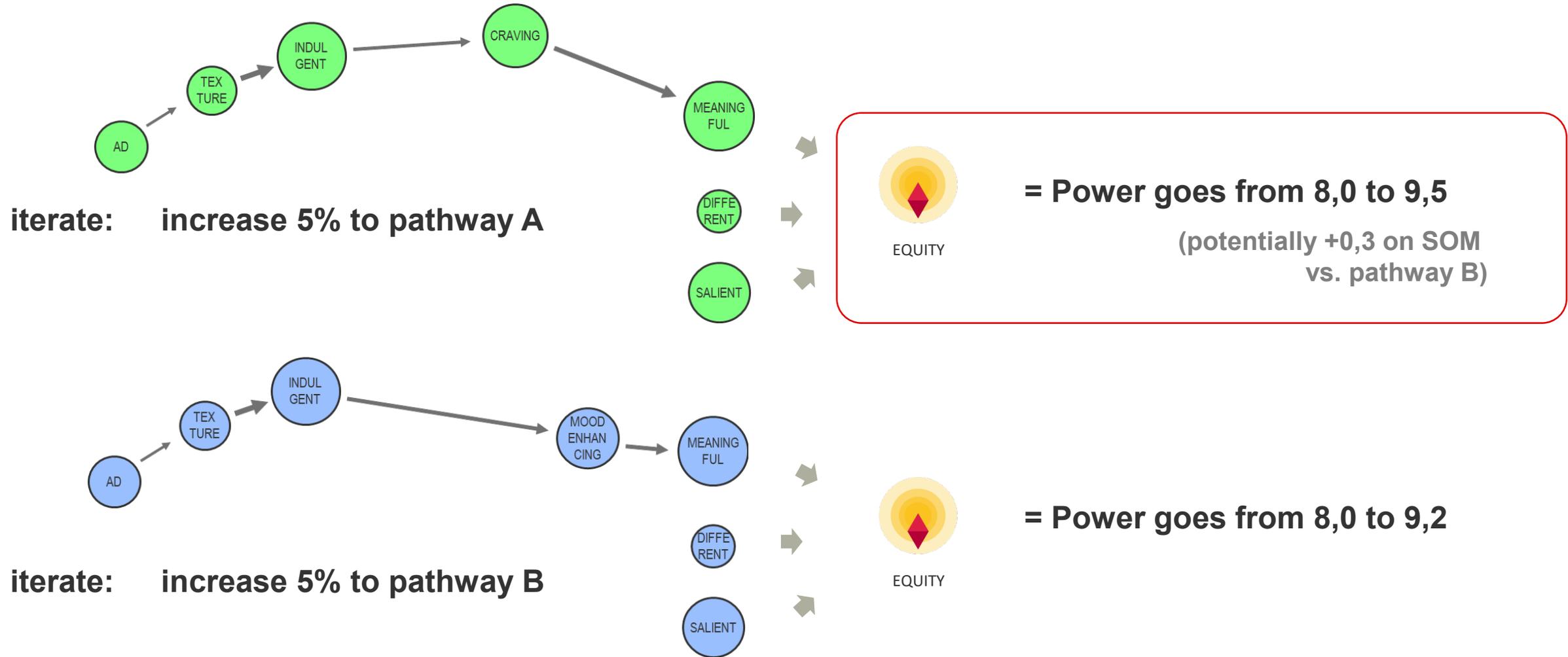
That might be due to

- the brand already owns that attribute
- the brand has little assets to attract those associations to itself
- or because that territory is very well protected by another competitor

pathway B: Pick me up



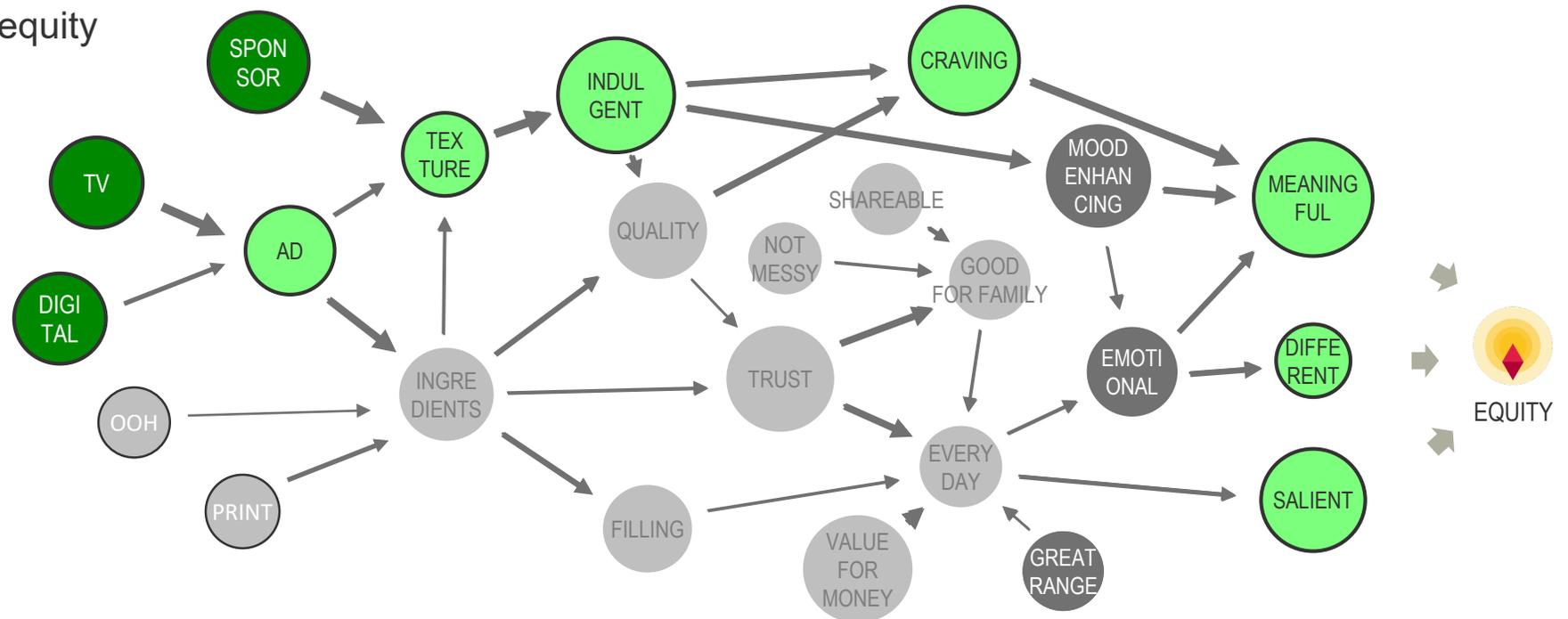
Comparing what pathways are the most promising ones



Quantifying the media effect on brand equity and to sales

BSA calculates the impact of media on brand building for sustaining long term demand

BSA can also calculate the effect of media into imagery and brand equity

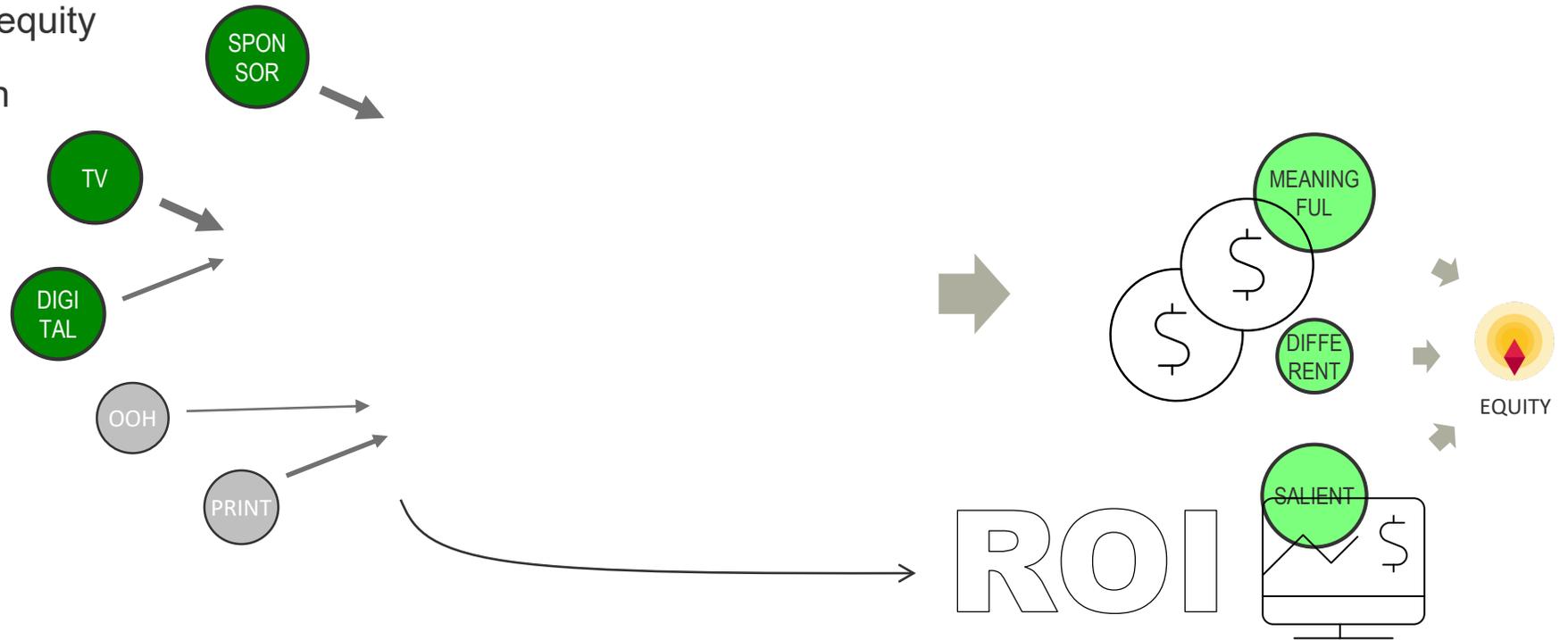


Quantifying the media effect on brand equity and to sales

BSA calculates the impact of media on brand building for sustaining long term demand

BSA can also calculate the effect of media into imagery and brand equity

Estimating also the contribution into sales



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Case study: US Finance Institution



How customers' perceptions of the brand have evolved during COVID

A leading financial institution wanted to understand how customers' perceptions of the brand have evolved during COVID

They wanted to make decisions on what messaging they should focus on and identify growth opportunities

Equity Drivers that increased the most during Covid19

- Consumer-centricity
- Personalized guidance
- Operate like a “local” institution
- Focus on issues facing the society



Empathize



**Local,
committed,
trustworthy**



OPERATE LIKE A LOCAL → **3x** MORE IMPORTANT

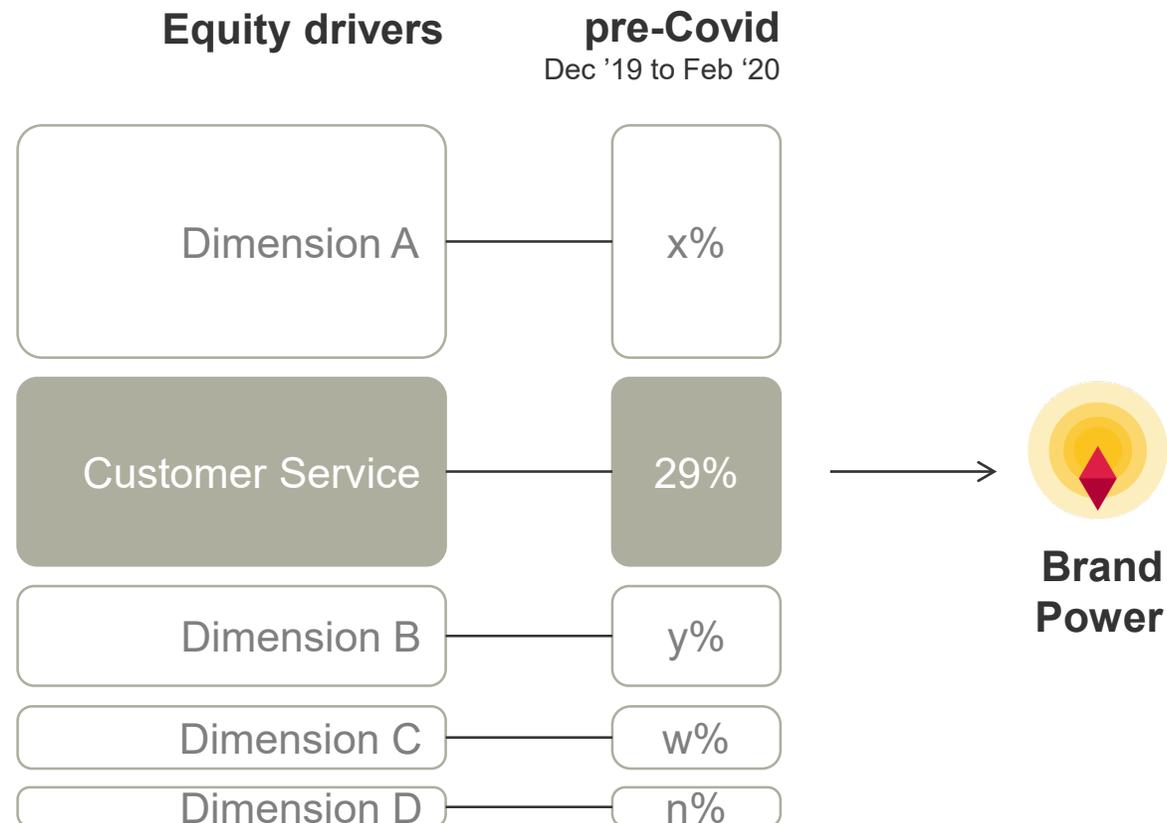


Case study: UK Insurance Services

How is the Coronavirus pandemic changing consumers relationships with Brands and how should brands react?

The Coronavirus pandemic stressed the UK Insurance category, as illustrated by Google Trends search volume doubling in March versus December levels, or pre and post covid19 periods.

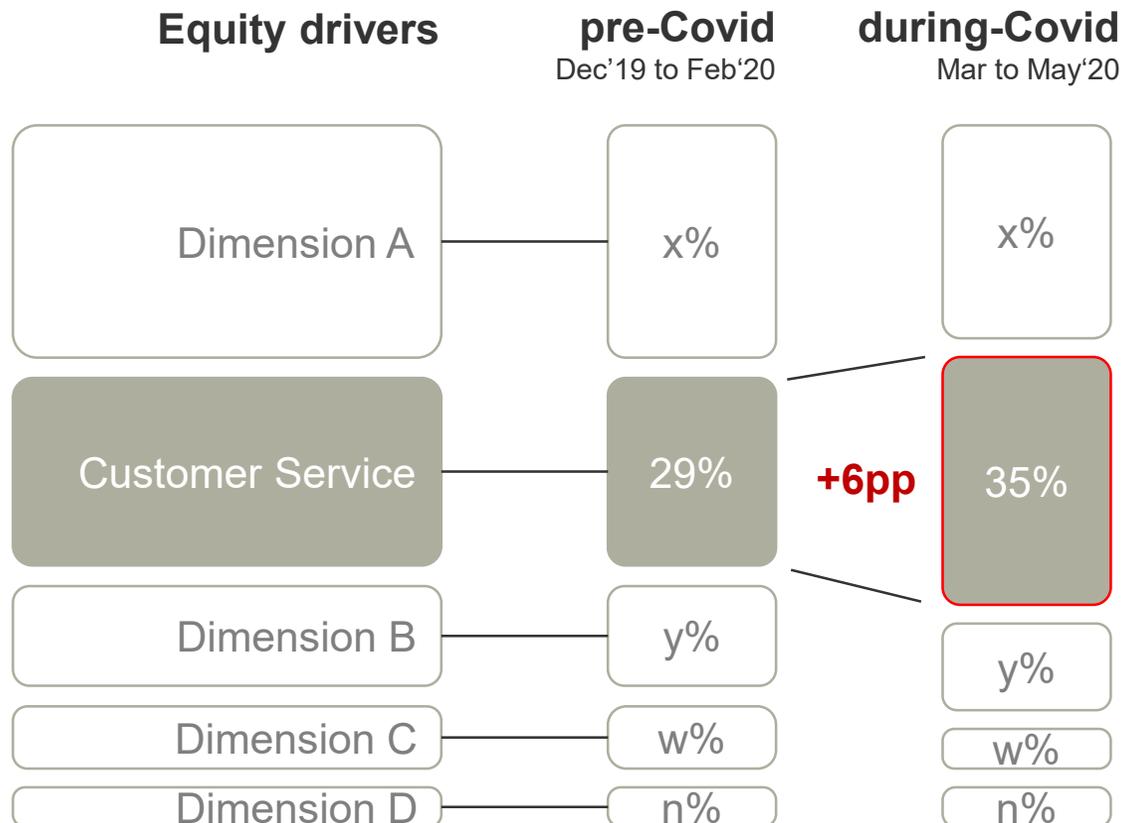
Kantar investigated whether this extraordinary level of additional consumer interest has changed the relationship consumers have with insurance brands.





Case study: UK Insurance Services

How is the Coronavirus pandemic changing consumers relationships with Brands and how should brands react?



Customer Service has become much more important in the new climate and it was crucial the client adapted quickly.

Results allowed the client to quickly adapt their service as much as their communication

- Operations
- Creative
- Campaign planning

Tracking is still being updated quarterly as the pandemic impact and consumer attitudes evolve in the UK.





Case study: CHN Soft Drinks case

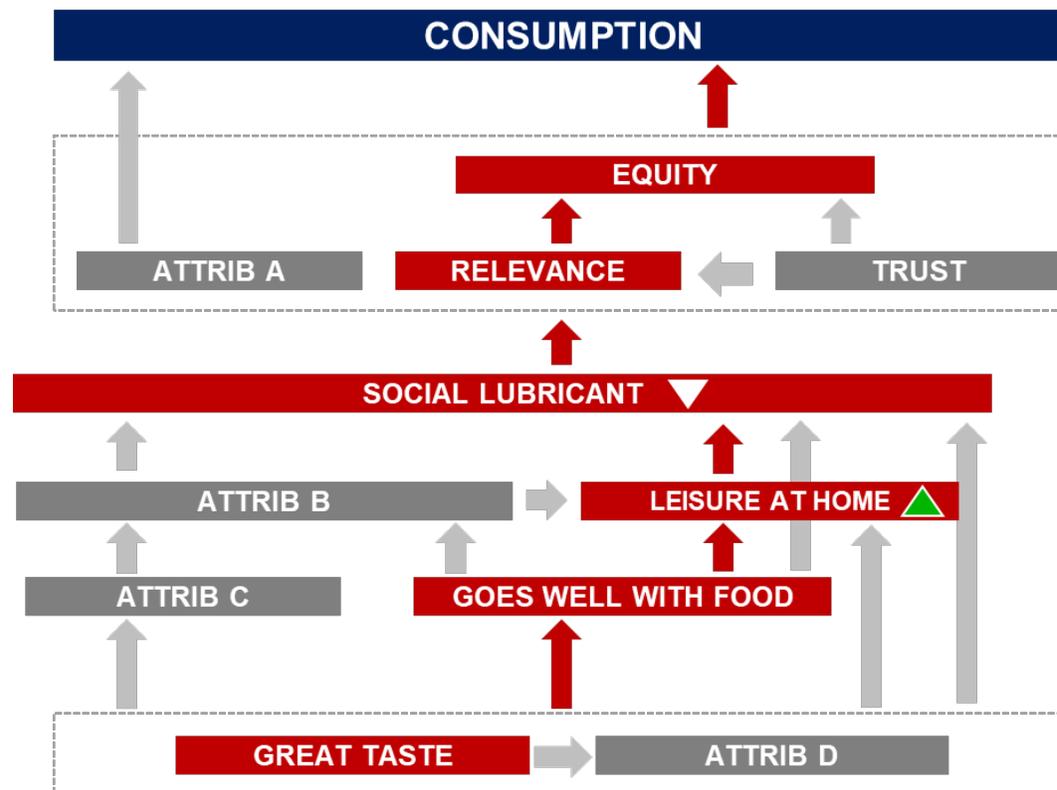
How to adapt messaging when social lubricant is no longer an option

The brand enjoys an extroverted positioning that emphasizes

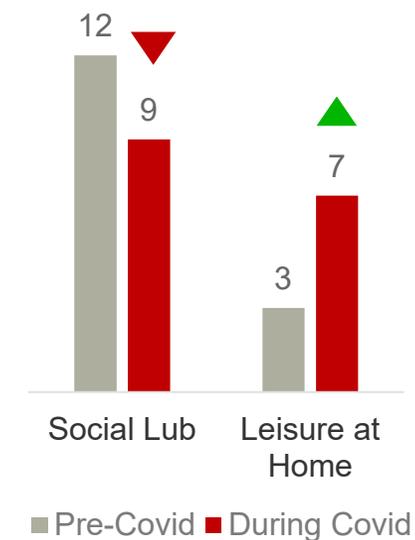
- an uplifting/energetic persona
- suitability for fun/social occasions mostly outdoors

What would the brand opportunities be during this crisis?

How to tweak its messaging / communication strategy to adapt?



MEAL AT HOME
2x
MORE IMPORTANT

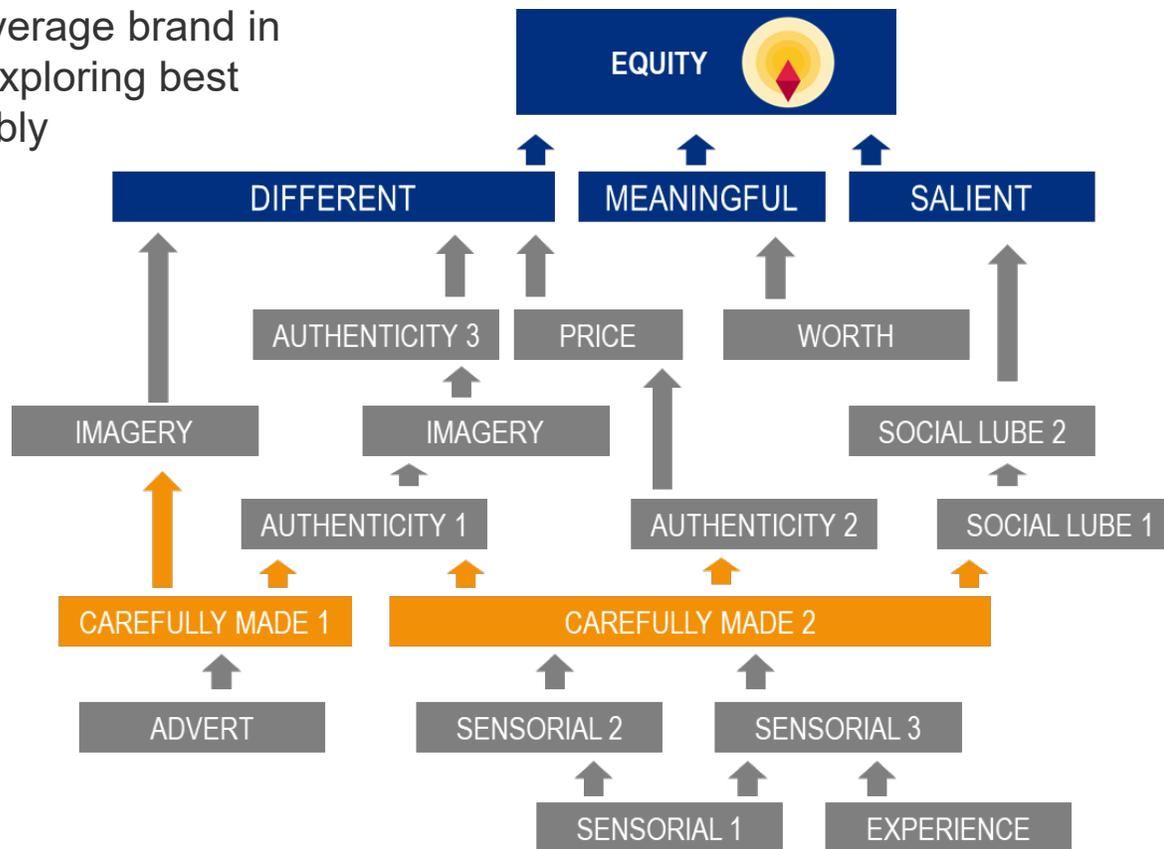




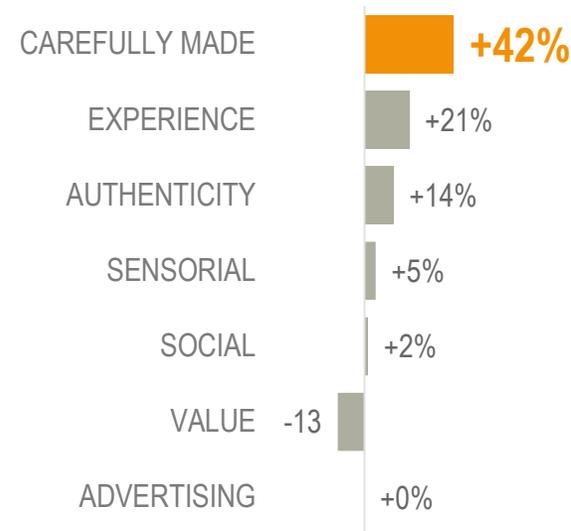
Case study: NL Alcoholic Beverage case

Drivers that show care with consumers have grown during covid-19 outbreak

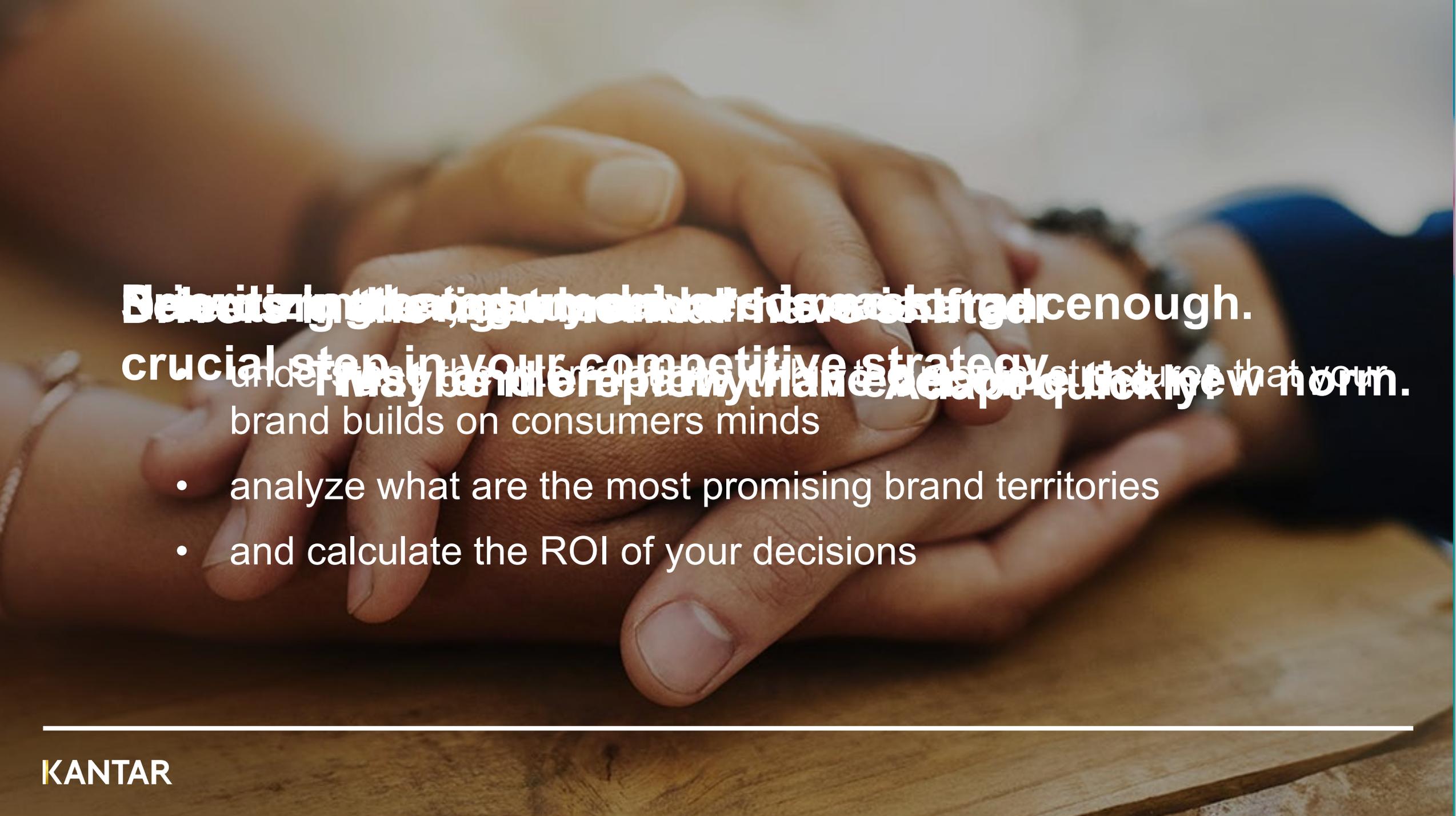
A leading alcoholic beverage brand in the Netherlands was exploring best ways to grow sustainably



relative growth of driver influence from pre-Covid to during-Covid



CAREFULLY MADE
1,6x
MORE IMPORTANT TO
MEANINGFULNESS



**Believing in the big idea isn't always enough.
It may be the most important step in your competitive strategy, but it's not the only one.**

brand builds on consumers minds

- analyze what are the most promising brand territories
- and calculate the ROI of your decisions

Questions



Thank you



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