

KANTAR



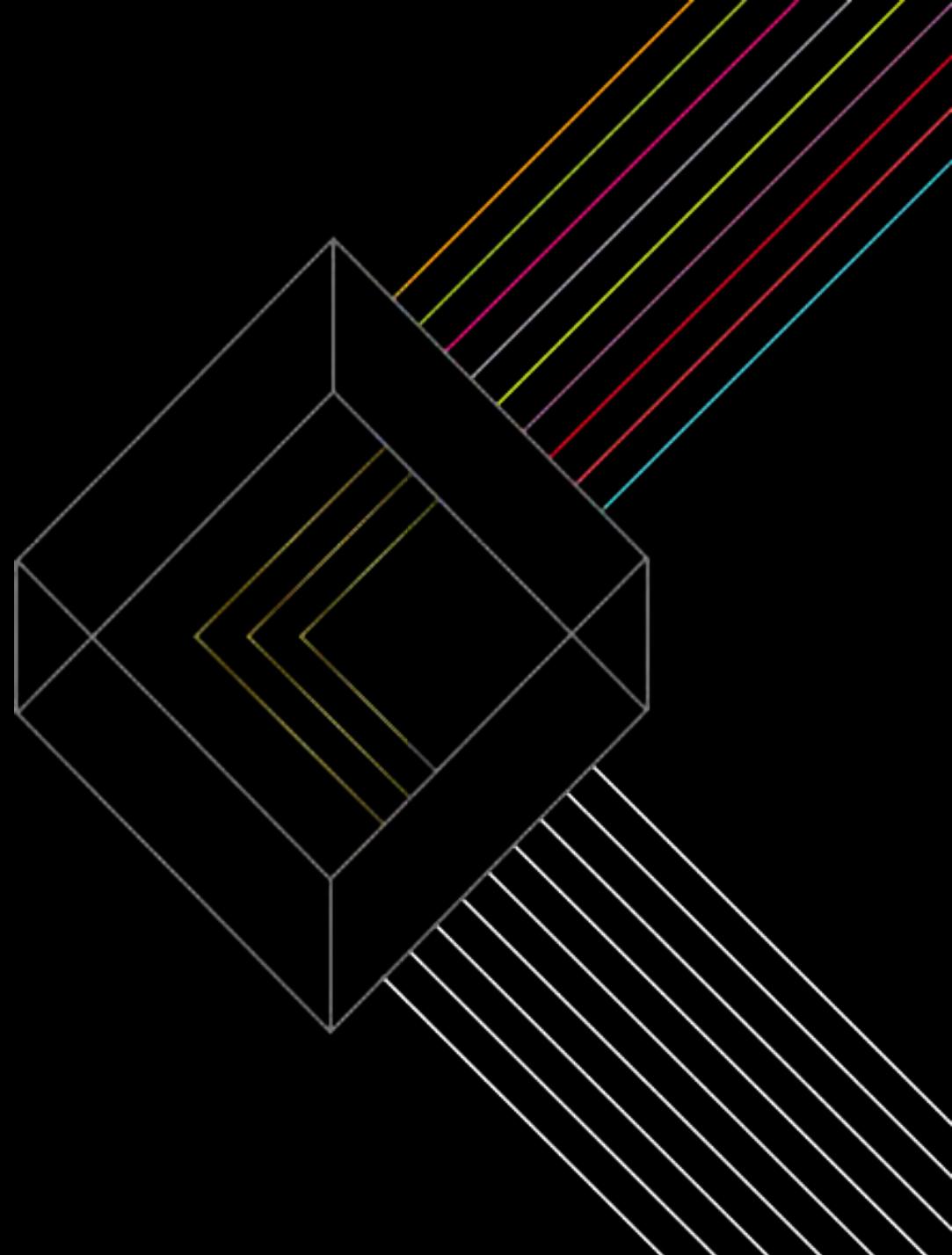
COLMAR BRUNTON
A Kantar Company

Marketing in an agile world

Ian Wentworth

Director Business Delivery &
Innovation Lead

September 2020





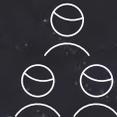
The changing world is transforming the way people live



Hygiene and protection



Financial worries



Changing nature of socialisation



The nature of the home



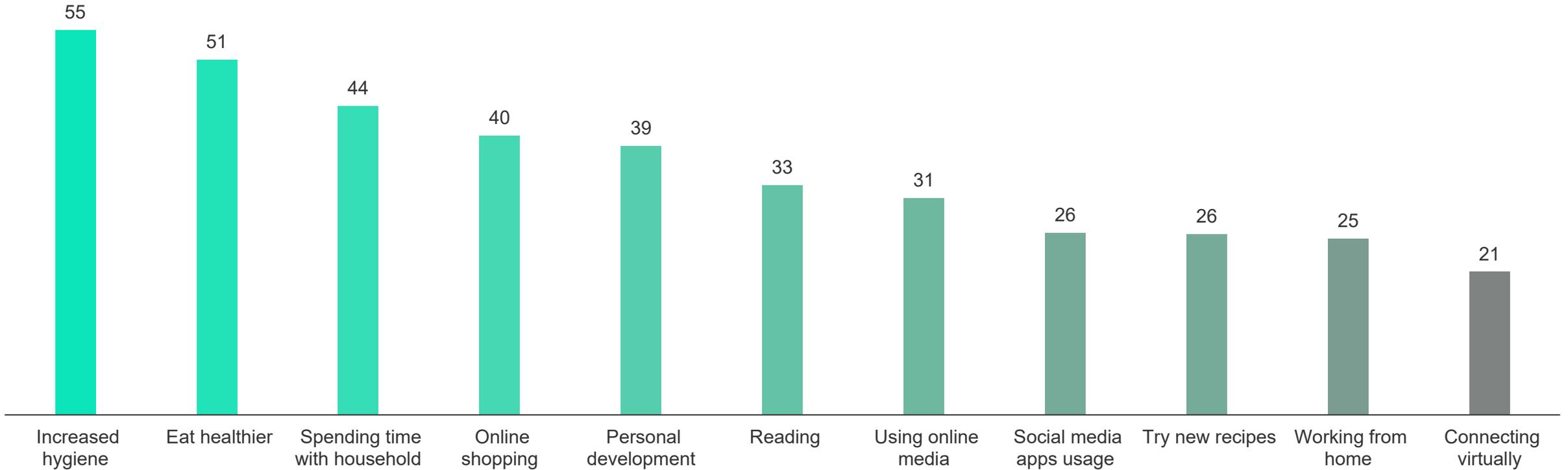
Rise in localism and e-commerce



Convenience and self-sufficiency

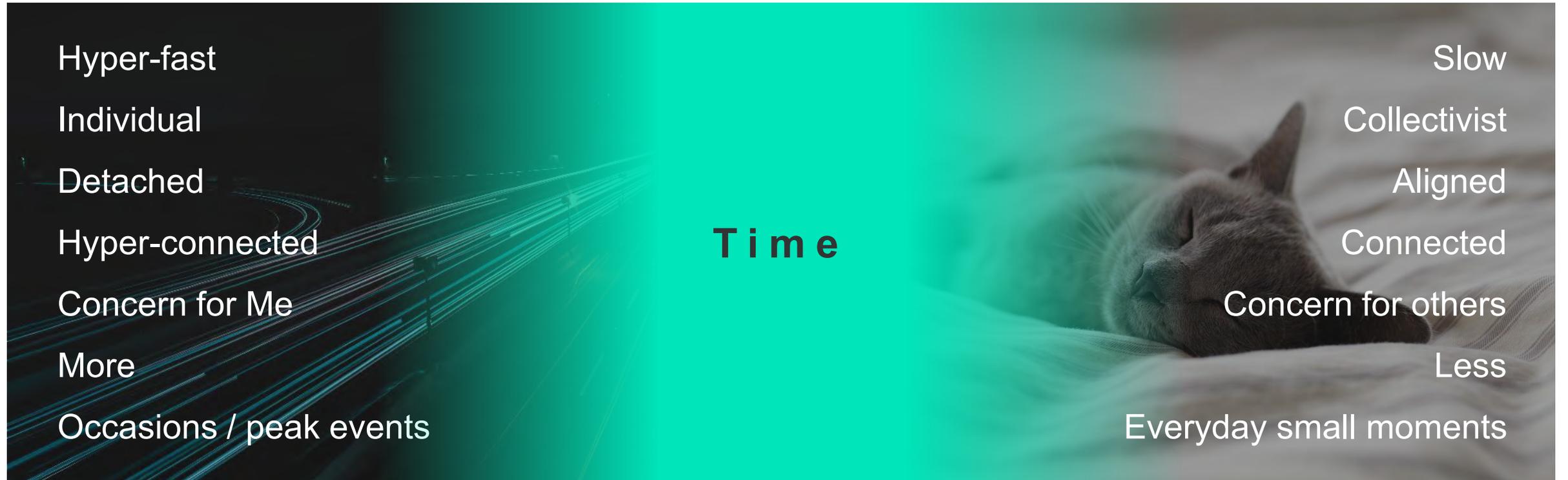
A new rhythm of life

Lockdown behaviours people want to keep: **Staying healthy and purposeful connections**



An altered relationship with time allowed many people to rediscover a range of valued experiences

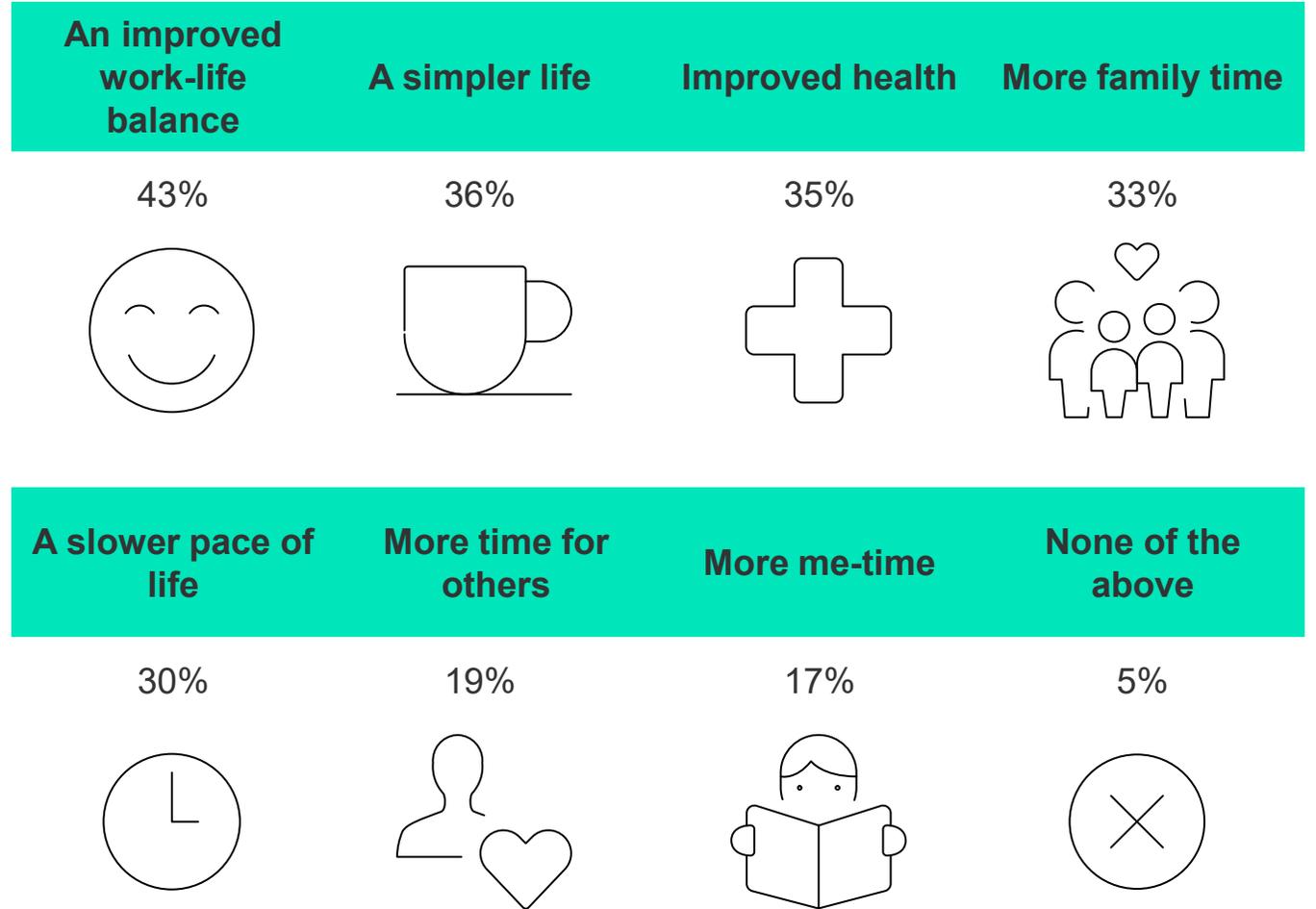
VALUE 1 : Time



95%

of NZ'ers want at least one of these different experiences to continue

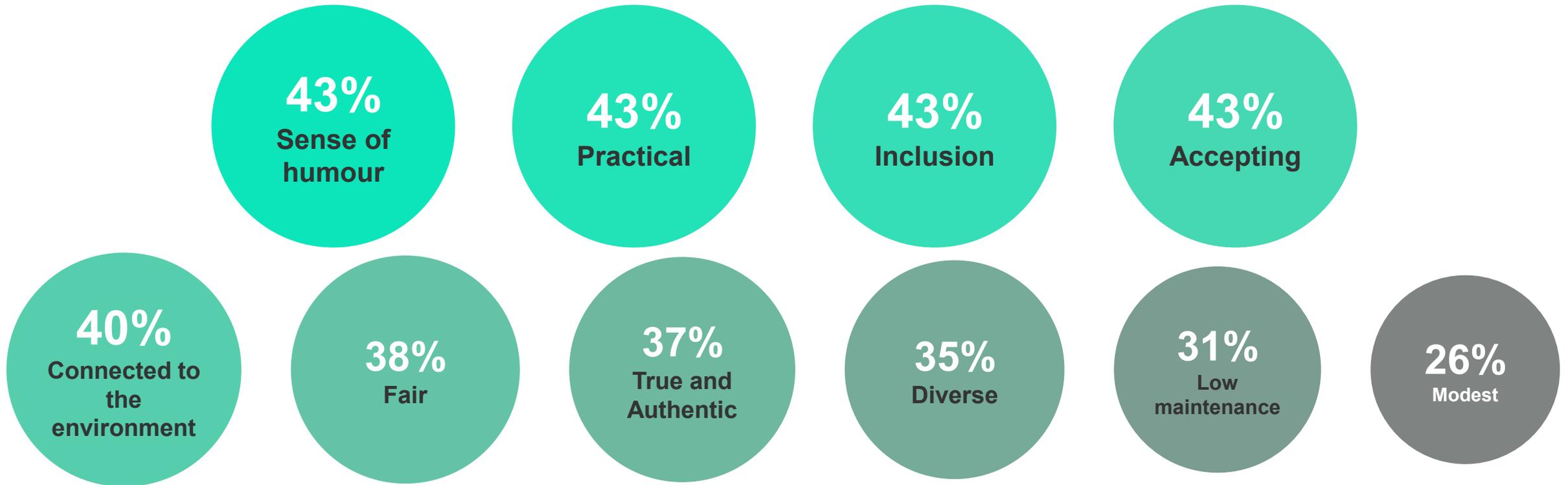
Which of the following would you like to continue or prioritise going forward?



We have re-connected with our cultural values, most notably our humour, practicality, inclusivity/acceptance/fairness and connection to the environment

VALUE 2 : NZ'ness

% Value this NZ'ness attribute more than before



For some NZ'ers, it has released the ongoing trend from a focus on a better self, to a focus on a better world

VALUE 3 : Sustainability

During the COVID-19 pandemic, what issues or parts of your life are you thinking about the most?

That lockdown measures are reducing our impact on the environment and climate change



24%

Sustainability and the environment



14%

We observed six major behaviour changes emerging through Lockdown 1.0



COOKING AT HOME

FLEXIBLE WORKING

BUYING LOCAL

ONLINE SHOPPING

SUSTAINABLE LIVING

LIVING ONLINE



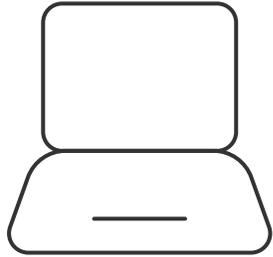
The behaviours with the greatest likelihood of continuing are flexible working, buying local and online shopping among a dedicated minority



Influence shopper decisions in the **moments that matter.**



Demands are greater meaning new approaches are needed to drive conversion along the O2O path to purchase



Digital continues to redefine the shopper journey and influence **purchase** decisions everywhere



Consumers expect brands to deliver great **seamless experiences** in a connected, omni-channel world

REINFORCE
ERODE

Path to purchase moments can **reinforce** or **erode** brand building efforts

20%

Activate the 20% of **touchpoints that matter** to those moments to maximise conversion

Digital influences purchase decisions everywhere

Digital **transactions** are just the tip of the iceberg

Buy food/drink online (L4W):



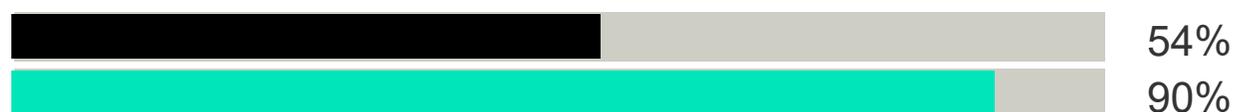
The **influence** of digital is much bigger

Research products online (weekly):



Digital has **impacted** all of our behaviours and habits at a societal level

Connected:



In a world where people are spoilt for choice...

Innovation remains the go-to strategy for growth.

But in today's competitive, experimental environment, it is harder than ever to drive growth.

The marketplace is evolving **faster** than ever before...

Channel choices are being disrupted

Social media and digital are changing the way people behave and information is gathered

Consumers have ever **increasing choice**



The innovator's challenge

Minimise risk of failure



Deliver **growth,**
margin, profit



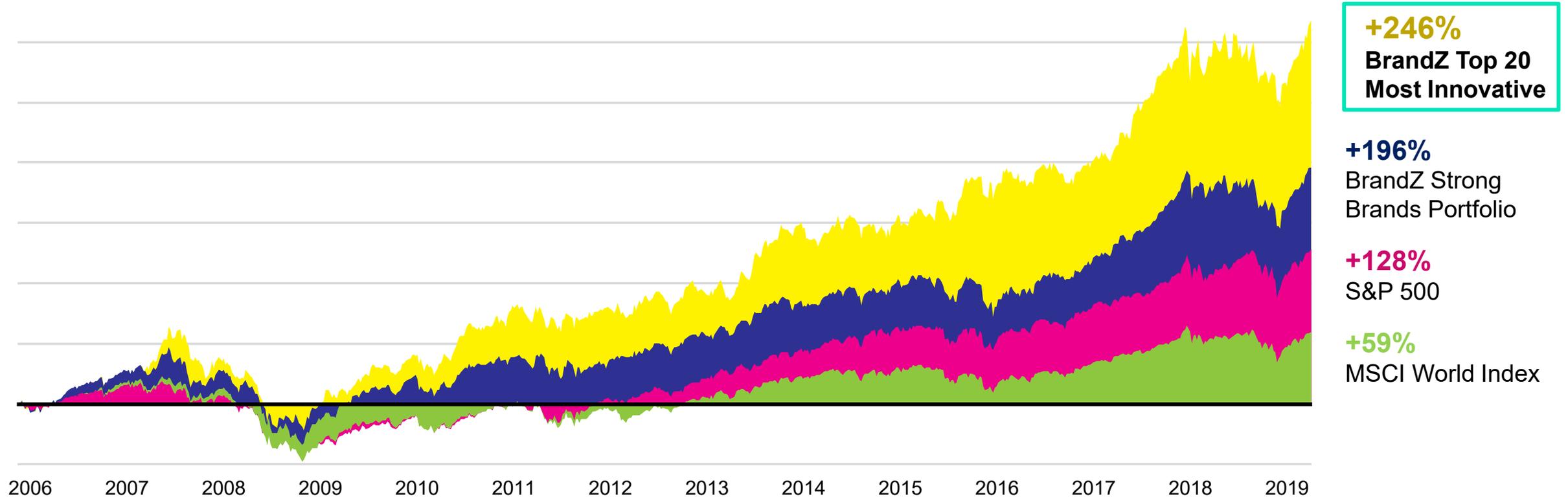
Develop
radical innovation



Reduce time from
ideation to market

It is imperative that businesses keep innovating at this time

Innovative brands grew at almost twice the rate of the S&P 500 after the 2008 economic crisis

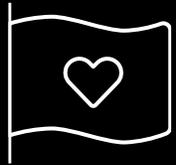


And....

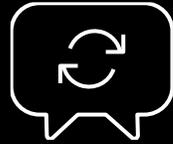
60%

...more innovations were
launched by winning
brands than losing brands
between 2008 and 2011.

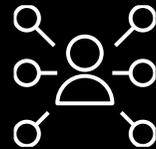
Global crises can provide the optimal conditions for **successful innovation**



Problem solving at the heart



Uniting around a purpose



Seeing the system differently



Unfreezing the organisation



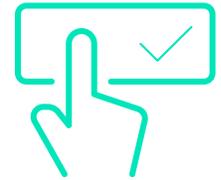
Creating a bias toward action

But it is not enough to say we need to keep innovating – COVID-19 is different

**Successful innovations post-COVID-19
will need to focus on:**

- Being meaningfully different
- Incremental and transformational growth
- New emerging consumer tensions and occasions and channels
- Being planet positive/sustainable

New opportunities are opening up for incremental and transformational innovation



Differentiating benefits

New users

Accelerated trends

Changing occasions

New channels

At the start of lockdown brands innovated at speed to address new consumer tensions whilst new products and services were launched during these turbulent times

New ways to **deliver to needs**

NETFLIX



New routes to **market**

White table-cloth restaurants offering takeaway meals during lockdown



Lean into **eCommerce/DTC**

Seedlip did an aggressive media push on a product trial format for DTC



In a changing world businesses must adapt quickly ... but how?

TEST AND LEARN mindset

“...being able to quickly quit things during this opportunity, and being able to quickly change the way things are done, and, being able to use this opportunity to further press the accelerator to actually achieve a new Toyota is something that is happening more rapidly, I believe.”

- Toyota CEO Akio Toyoda

In a changing world businesses must adapt quickly ... but how?

BE AGILE: but not at the expense of rigour or actionability

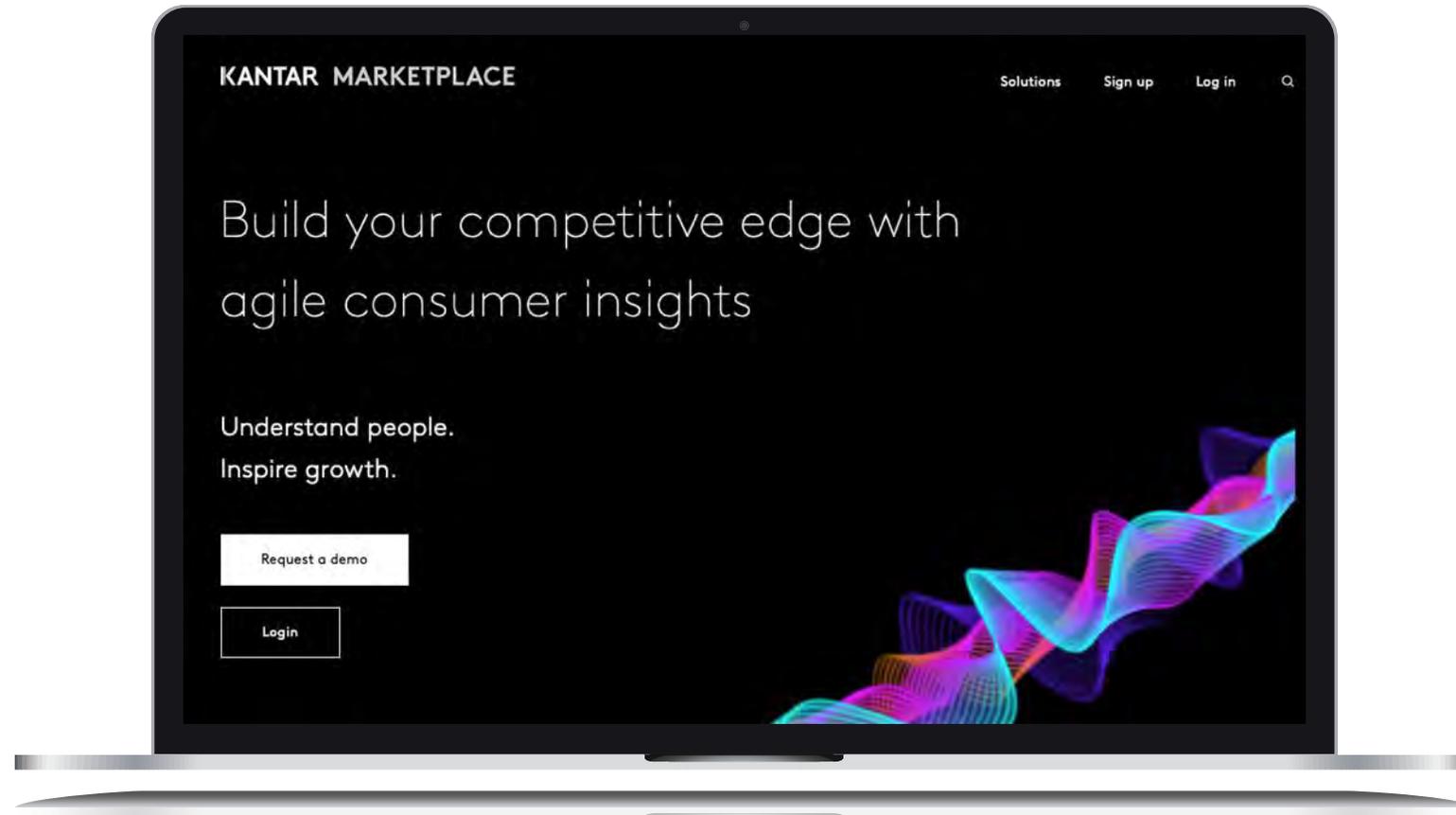
“It is not the strongest of the species that survives, nor the most intelligent, but the one that is most adaptable to change.”

- Leon C Megginson



More than ever clients need
fast, reliable intelligence
so they can act quickly and
make timely decisions in
this complex world

Kantar Marketplace is a leading-edge platform built for agile decision making



The only innovation portfolio to steer you through the full journey



Find the best ideas

Idea eValueate:
Shortlist the best ideas to take forward to concept development.

Coming soon



Optimise winning concepts

Concept eValueate:
Identify winning concepts and optimise their growth potential quickly.

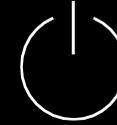
Available now



Identify stand out packaging

Pack eValueate:
Prime your pack for success and make sure it stands out on shelf, at speed.

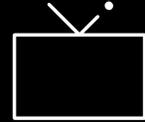
Available now



Maximise your product's launch appeal

Product eValueate:
Test your product quickly in a real home environment to maximise your product and launch potential.

Available now

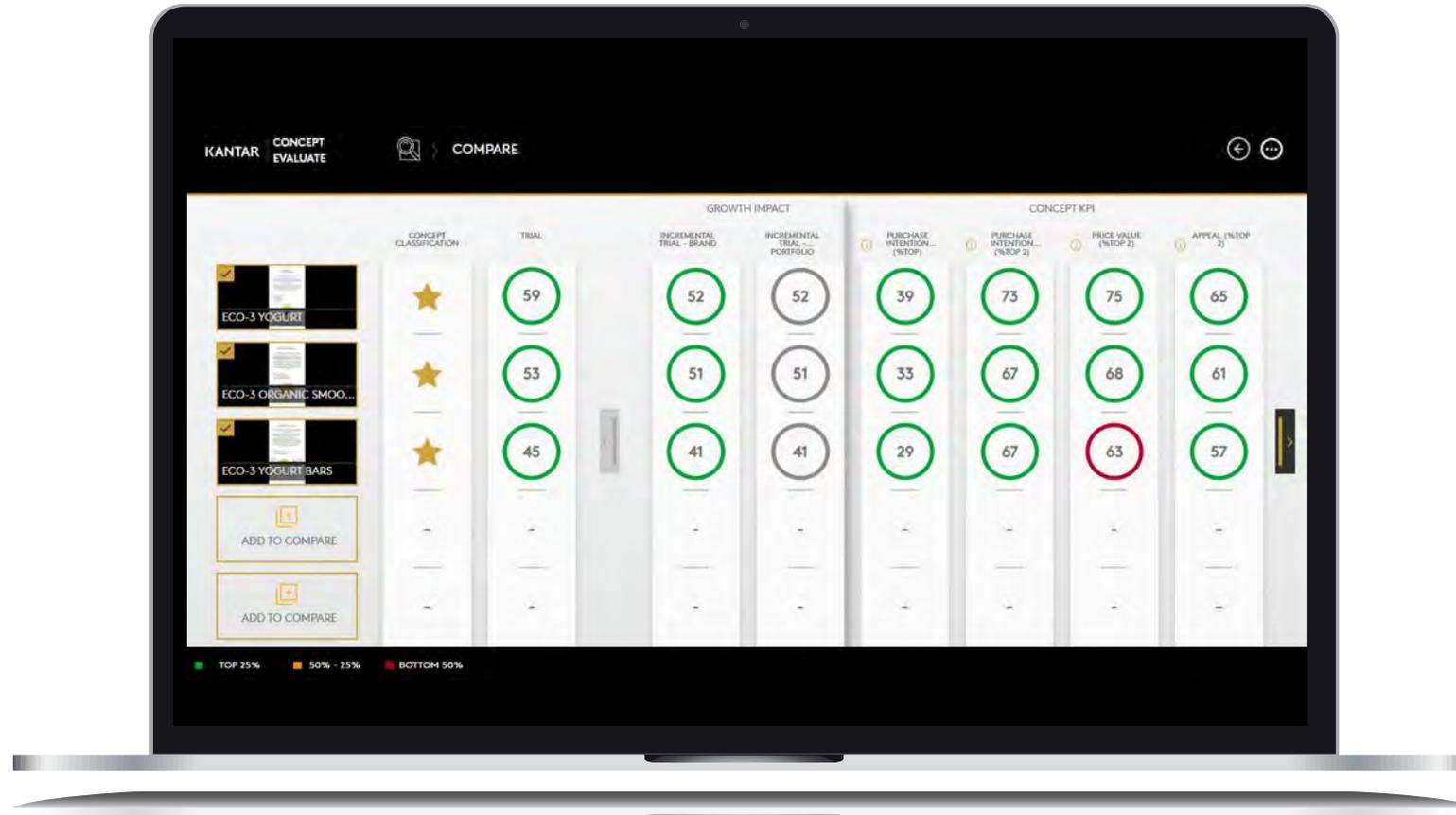


Ensure effectiveness from your campaign

Link Now:
Pre-test your communications to maximise opportunity for creative success

Available now

With easy access to individual project insights and a knowledge library



CASE STUDIES

CLIENT CHALLENGE	<h3>Fast turnaround multi-market concept screening</h3> <ul style="list-style-type: none">- Our client had a time-sensitive decision to make around the direction of their NPD and whether to invest into a potentially new and category challenging product	<h3>Fast turnaround pre-testing</h3> <ul style="list-style-type: none">- Our client had internal debate around the direction for a campaign due to launch early the week following
APPROACH	<ul style="list-style-type: none">- Kantar utilised our proprietary concept testing tool eValueate Express – a fully templated and automated NPD testing tool to test the idea – which offers not only feedback on the concepts but benchmarks and recommendation on whether to proceed with	<ul style="list-style-type: none">- Kantar utilised Link Express through Marketplace to complete the project from receipt of the video files on Friday night to Monday morning – with a recommendation in the client’s inbox Monday afternoon
OUTCOME	<ul style="list-style-type: none">- From confirmation, the fieldwork and reporting was complete within three working days across the three countries- The client was able to remove the risk from the decision and make a recommendation to the business within a week of commissioning the project	<ul style="list-style-type: none">- Fact-based decision made with the reassurance of the Link testing framework

CASE STUDY: A framework for Marketplace

<p>CONCEPT TESTING</p>	<p>1.</p> <p>Agile concept screening to identify strong / weak concepts</p>	<p>2.</p> <p>Proceed with Stars, iterate others with potential</p>	<p>3.</p> <p>In depth concept testing (pricing, SKU, cannibilsation)</p>	<p>4.</p> <p>Packaging testing</p> <p>Product development</p> <p>Sensory testing</p>	<p>Launch</p>
<p>CREATIVE TESTING</p>	<p>Qualitative territory / execution exploration</p>	<p>Finished executions – multiple cuts – run through Link Now</p>	<p>Iterate / media weight accordingly</p>		<p>Go live</p>



Kantar's Marketplace has enabled our business to get **fast-turnaround insight** into our comms development process...

....meaning we can make early and informed decisions – with the added reassurance of using the well-established Link approach. Kantar's Concept eValue concept screening is already a crucial part of our innovation pipeline process so I'm looking forward to taking advantage of the increased agility that Marketplace offers for future innovation pipeline development."

Joanne Reid

Group Marketing Services Manager

Fonterra Brands New Zealand Limited

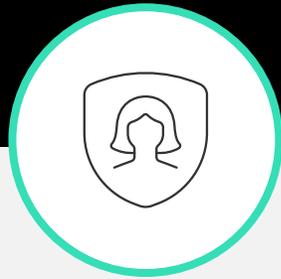


Five tips to **recovery and growth** through innovation



Innovation is the engine of growth

1.



Don't lose your brand identity

2.



Tension presents opportunities to innovate

3.



Act with agility *and* rigour

4.



Don't be afraid to iterate, test and learn

5.

**Where to
from here?**

KANTAR

MEDIA TRENDS
& PREDICTIONS

2020

KANTAR



COLMAR BRUNTON
A Kantar Company

Thank you

Ian Wentworth

Director Business Delivery &
Innovation Lead

Ian.Wentworth@kantar.com

+64 21 493 689

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