

KANTAR

BLURRING
BOUNDARIES

The new world (dis)order

Modern life is a constant surprise. It has a strange duality. In one moment, humanity seems to be teetering on the edge of a dystopian future of our own making, awash in cartoon politics, personal value measured in 'clicks' and 'likes', and a new identity crisis lurking around the next corner. Yet, in the next moment the very same perpetrator — technology - arises our saviour. Elon Musk and his Mars spaceship promises to save humanity from a polluted destiny. Productivity gains delivered via artificial intelligence will allow us to recoup lost time with loved ones. Self-driving cars will alleviate our frustrations and make us safer.

Blurring boundaries

Technology has become inextricably intertwined with modern life in unexpected ways and the demarcations between the 'real' world and the digital are disappearing. Today we find ourselves in a position where the boundaries between technology, brands and humans are blurring. Smart glasses, heads-up displays, augmented reality, virtual reality and the Internet of Things, all allow us to experience life via different means.

According to Kantar Media's 2018 TGI Europa study, close to 50% of Europeans say they can't manage their daily life without the internet.

Kantar TNS Connected Life 2017-2018 informs us that 29% of global 'Connected Consumers' feel they use their mobile phone too much. Although e-commerce as a total of all consumer spending varies by country, Kantar Worldpanel notes that almost a quarter (23.3%) of consumers' purchases in the UK are online.

We are George and Judy Jetson- we talk to machines that 'live' in our homes. According to Kantar Media DIMENSION 2018, new media formats are on the rise with one in seven consumers (one in four in China) owning a smart speaker. Ironically, these machines are privy to our most private conversations. So, while we may lie to ourselves, big data and the queries we enter into the search engine late at night don't. Google knows us better than we know ourselves.

As voice technology becomes the norm, chat bots become more adept, and robotics and drones play an increasingly prominent role in everyday life, the distinctions between our surroundings and ourselves are dissolving.

Does this matter? In recent history, a clear boundary defined humanity's physical and conceptual spaces versus those of commerce and business, thus circumscribing social norms and cultural acceptability. With these lines fading, so too is the established understanding of the 'go' / 'no-go' zones between people and business. Consumer expectations of brands is evolving. But do consumers want Amazon to appear in their phone messaging app alongside their loved ones? How much of their anonymity are consumers willing to give up for personalised services? Do they want brands to advertise relevantly but also Minority Report-style personally to them? And just because a business can do this, should they? Social media exemplifies these hazy margins. Is it real or digital? Private or public? Personal or business?

Technological advancement is leading to unclear socio-cultural boundaries between people and brands, and the confusion is resulting in suboptimal outcomes for both consumers and businesses. Clearly, there are practical, social and cultural kinks to work out when it comes to how technology is leveraged in the brand-consumer experience. Sci-fi fantasies aside, where these very real boundaries will eventually come to rest is unclear, and present a series of major challenges for marketers to navigate.

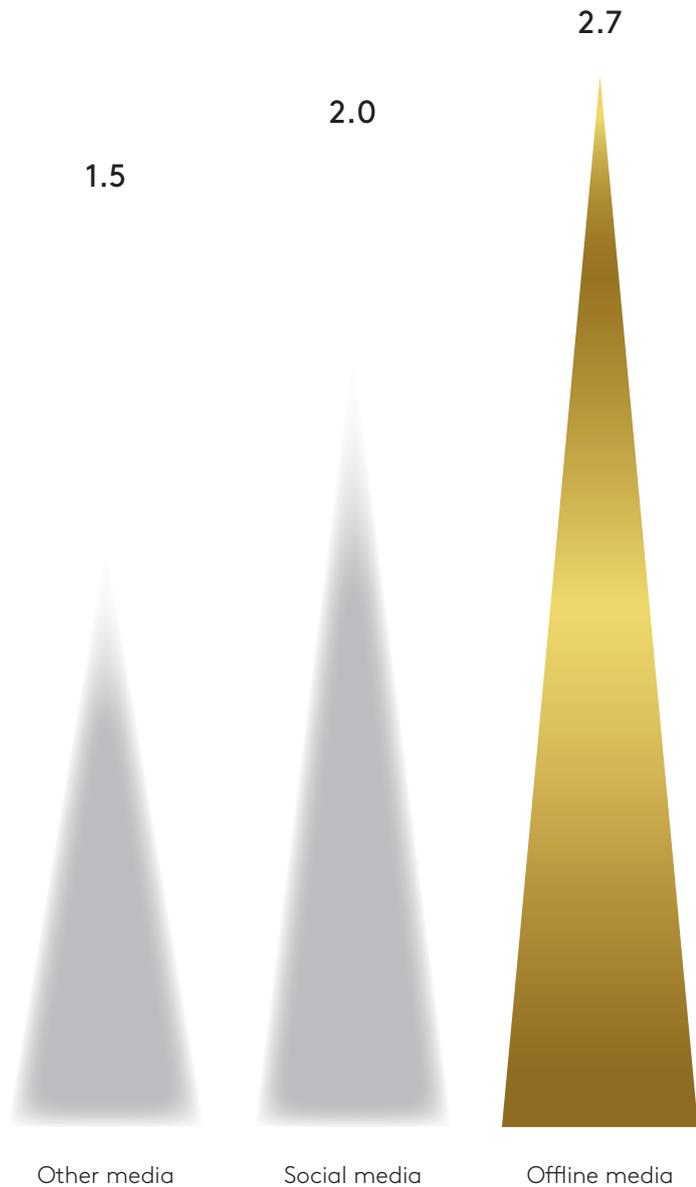


Context: Always 'on' communication

Connectivity technologies like mobile phones, virtual assistants and smart speakers, enabled by voice-recognition technology, natural language processing and artificial intelligence have made it possible for marketers to reach people anywhere at any time. According to Connected Life 2017-18, 91% of global internet users are on social media, spending an average of two hours a day there. 'Connected Consumers' spend an additional 1.5hrs online not on social media, and 2.7hrs per day on offline media.

When they are connected they aren't just on one device – 35% globally say they use multiple devices at the same time when they are online. According to DIMENSION 2018, 71% of 'Connected Consumers' use an online music streaming service, 65% play video games online, and 14% use a smart speaker.

Fig. 1: Hours- global daily media usage



Currently, for consumers, the utility of being able to check closing stock prices, order tonight's dinner, and book an airline ticket for tomorrow, comes with a 'sanity' price tag. With the myth of multitasking busted wide open, marketers can't escape the fact that human attention is finite. Unwanted information is overwhelming and leading to consumer discontent. According to Connected Life 2016, people complain of feeling drained from the constant interruptions, with 34% of people globally feeling constantly followed by advertising online. Kantar Media's 2018 TGI Europa study confirms that 40% of people find advertising on social media intrusive.

Keeping pace with a world where there are fewer and fewer boundaries is a challenge for consumers and marketers alike. While it is somewhat understandable that marketers can't help but respond to an imperative to create ever more content, consumers bear the brunt of this. Kantar TNS' Connect database analysis calculates that consumers encounter an average of 18 branded touchpoints within just a single category. 'Always-on' mobile connectivity and high communications volumes are crushing consumers.

Challenges this context presents for brand owners

How do brands know if their business is vulnerable to the impacts of these externalities? If consumers are going 'there', can't brands follow? How does a brand gauge where the new limits rest, or where and when consumers welcome interaction? How do brands engage in the key moments that matter with the right message to optimise this finite attention span?

Technological advancement is leading to blurring socio-cultural boundaries between people and brands, and the confusion results in suboptimal outcomes for both consumers or businesses.

Context: Online crisis of trust

Consumer trust is low. While not isolated to the online world, much of the current waft of scepticism is super-charged by it. According to Connected Life 2017-18, while almost everyone still watches some TV (96%), globally people spend almost an hour more engaging with online media than they do with traditional media. Fake news, chatbot armies, unrestrained trolls, spy drones, systematic prejudice, corporate misuse of personally identifying information, and the strategic use of social media to rig national elections — all negatively impact on people's perceptions of public figures, organisations, institutions and brands, and create negative environments in which brands are perceived and experienced.

Even before the Cambridge Analytica scandal, 40% of 'Connected Consumers' globally agreed: "I am concerned about the amount of personal information that companies know about me". Over time we have grown addicted to the very intrusions that we once only tolerated, our wants indulged as our privacies invisibly diminish.

What's more, Connected Life 2017-18 reports that globally 43% of people "completely object to the idea of connected devices monitoring my activities, even if it makes life easier." So, while the use of smart speakers is on the rise, people do not want units 'listening' when they are not being directly addressed.

Fig. 2: Disruption- crisis of trust

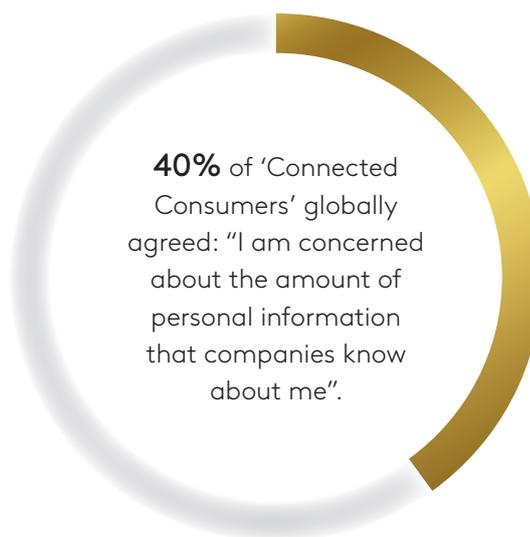
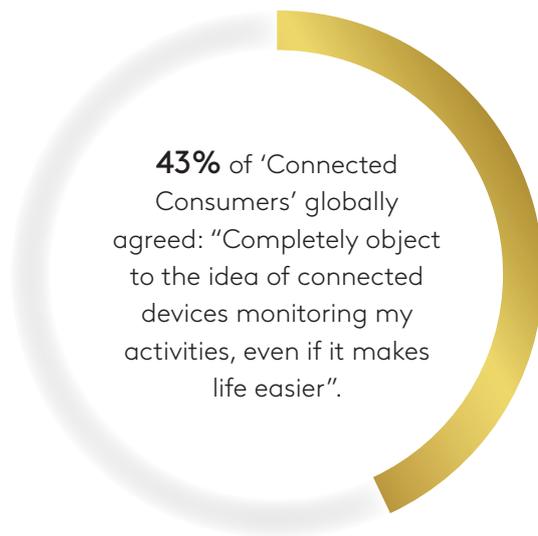


Fig. 3: Go away



The disconnect between some businesses and consumers is so strong that momentum seems to be taking the two groups in entirely different directions. While the delicate balance between data usage and exploitation is perhaps a more natural dynamic in B2B worlds, similar adversarial tactics now pervade the B2C realm. Businesses are staking out defensive positions, governments are stepping in to regulate, and consumers are showing their dissatisfaction through outrage, boycott and litigation. Although not all brands are to blame for creating this situation, all brands will be scrutinised. The modern consumer-brand relationship has been blown wide open for re-examination.

Challenges this context presents for brand owners:

How does a brand best navigate this environment? Should a brand balance its interests with those of its consumers? And if so, how? How are brands to know what consumers will pay and stay for? How do established brands and consumers efficiently renegotiate a satisfying value exchange? How much of a dialogue should there be? How does a brand engender confidence and trust in consumers in an environment of scepticism and scandal? What will determine which brands survive the trust inquisition? What impact will brand presence on a given platform have on its reputation?

43% of people agree: "I completely object to the idea of connected devices monitoring my activities, even if it makes life easier." - Connected Life 2017-18

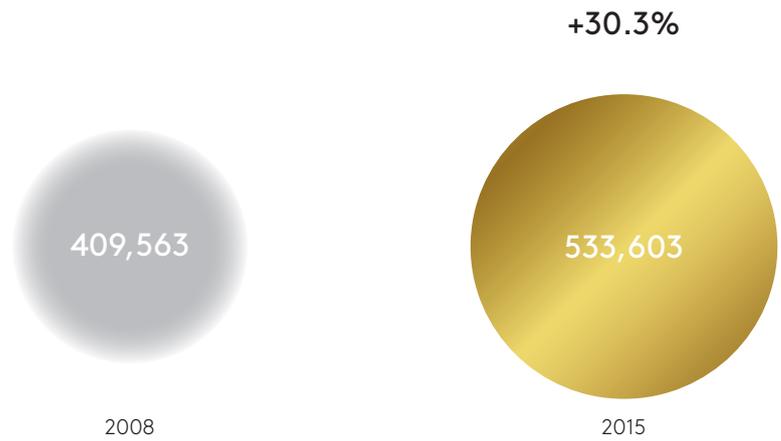
Context: Increasing ad volumes

The sheer volume of advertising being produced is increasing. Kantar Media findings from Kantar's FragmentNation 2016 study shows a 30.3% increase since 2008, in the number of brands trying to reach U.S. consumers with advertising. BrandZ™ Top 100 Most Valuable US Brands ranking powered by Kantar Millward Brown, shows comparatively that the increase in the number of brands people are aware of is only 3.9%.

People with their same limited human attention capacity are bombarded by more and more information. This negatively impacts people's perceptions of brands.

Fig. 4

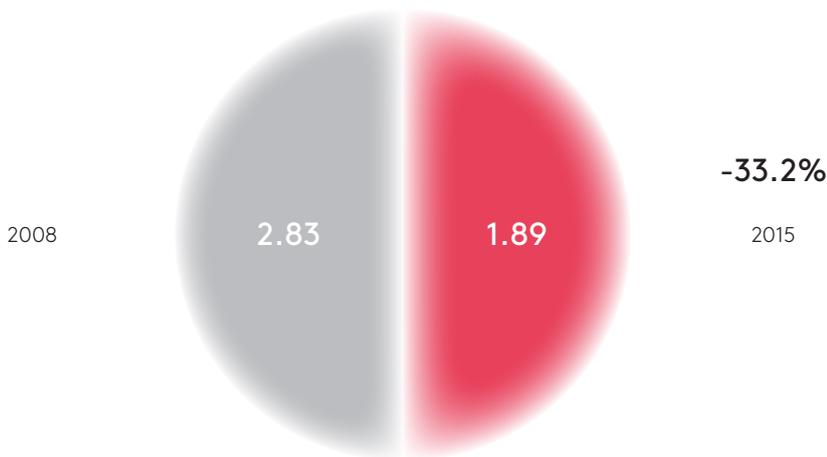
Number of unique brands with monitored ad activity*
Nearly 8x divergence



Average number of brands per category consumers aware of*



Fig. 5: Average brand clarity rating



The same study shows that 'brand clarity', a brand differentiation indicator, has fallen more than 30% since 2008. That's a lot. Brands are struggling to be heard in environment of excess.

As the flood of activity due to fragmentation exceeds the capacity of consumers to keep up, the ability of consumers to recognise differences amongst brands diminishes. So, although consumers spend on average globally 6.2hrs per day viewing media, this has not kept pace with increasing advertising volume.

This is even more troublesome when we consider that analysis of the Kantar TNS Connect database confirms that on average 20% of touchpoints, deliver 80% of impact with consumers.

'Brand clarity', a brand differentiation indicator, is down just over 30% since 2008.

Although brands aspire to engage in positive and meaningful interactions with consumers, activity volumes also increase the chance that consumers will have unsatisfying interactions with brands.

DIMENSION 2018 reports that consumers who feel that advertisers are doing a better job of communicating has fallen slightly from 73% to 71% this year, with 20% of respondents saying they think advertising is changing for the worse. These factors appear to be leading to an erosion of consumer trust across brands, regardless of individual activity. This, of course, has led to the rise of adblocking.

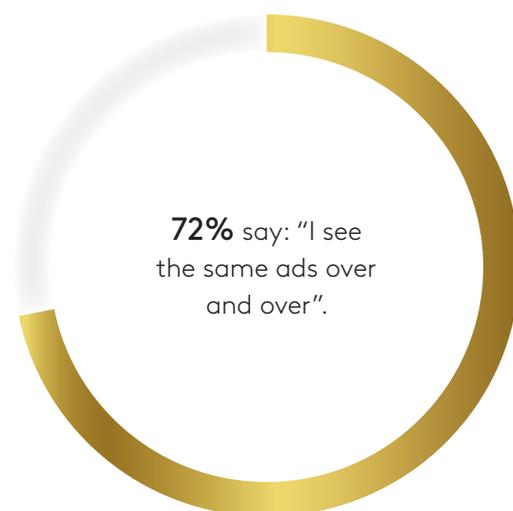
Challenges this context creates for brands?

How do brands avoid becoming part of the communications noise? How do marketers use this as an opportunity to set them apart from the competition? If brands aren't trying to engage with consumers as much as the competition won't this reduce brand share-of-voice and thus market share?

Context: Algorithmic identity crisis

Too many businesses are blinded by data, allowing algorithms to dictate consumer interaction, including the frequency of contact. Consumers are frustrated by 'programmatic stalking', with 56% saying they often see online ads for products they've already purchased (DIMENSION 2018). Further consumer irritation from 'algorithmic overfit' results in 72% saying they see the same ads over and over.

Fig. 6: Disruption- algorithmic identity crisis



Blurring Boundaries

Regrettably, this dynamic is not isolated to a handful of inept brands. Many businesses inadequately navigate the 'push and pull' of the consumer-brand relationship and fail to demonstrate value. DIMENSION 2018 reveals that only 40% of people say that they see an increasing number of relevant ads. But consumer tolerance for this type of tone-deaf, one-sided behaviour is likely to be even less tolerated, as consumers become more informed of what they are giving up and thus demand greater enterprise etiquette.

Consumers feel overwhelmed, sceptical and misunderstood. Caveat venditor.

Challenge this context creates for brands?

How do brands engage in a more relevant way with consumers? How do brands do that with potentially less consumer data? Is there an upside to this situation?

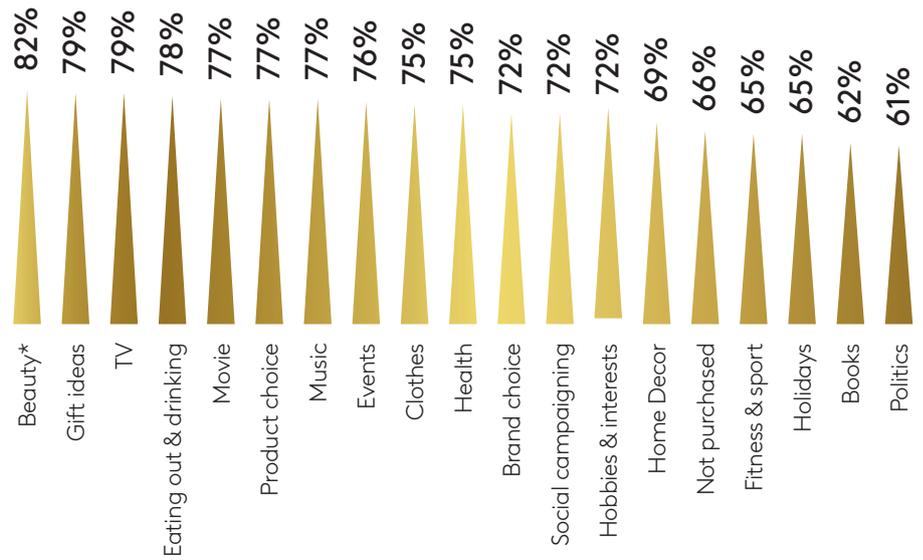


Context: Social Media

Social media platform proliferation and the resulting channel disaggregation further magnify the disruption to the consumer-brand conversation. This, of course, has led to the rise of adblocking. According to Kantar Media, over 20% claim to use an ad-blocker all the time, citing poor creative, lack of relevance, contextual inappropriateness & inaccurate chronology as key reasons.

We have examined the negative aspects of ‘always on’ communications. However, consumers also simultaneously have been empowered by the internet. Amongst other utility, it has eliminated many informational imbalances. Social media in particular has enabled the breakdown of these barriers. Consumers are able to access information and opinions across more categories than ever before... But while the availability of information and the context of interactions have changed (online), the rules of interaction remain the same.

Fig. 7: Tech disruption category level impact- brands must develop their social capital
% of whom a decision has been influenced by social media



* female sample

As discussed above trust is an important context impacting all brands. Today even the most elemental aspect of online transparency — say, if a social influencer’s endorsement is a result of compensation or not — is a continued cause for consumer scepticism.

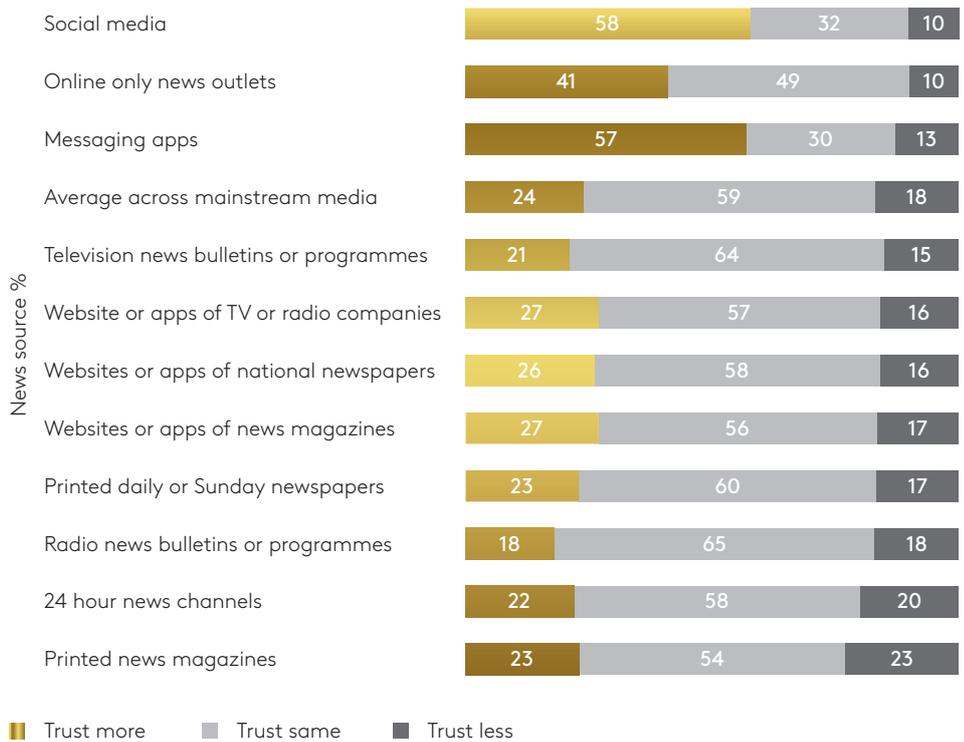
Fig. 8: Disruption- crisis of trust



“Most of the information on social media is unreliable”, say 35% of global internet population according to Connected Life 2017-18. In countries like Australia, UK, US and Sweden this increase to 50%+.

Social Media – more so than any other digital platform has a significant trust issue to overcome. Kantar’s Trust in News study from late 2017 outlines the reputational impact the fake news phenomenon had on the reputation of online platforms. 58% of survey respondents said they trust social media platforms less as a result of ‘fake news’. Brand owners need to manage the implications of their brands being presented in distrusted environments.

Fig. 9: The impact of hearing about ‘fake news’ on trust in politics and election coverage on platforms used (UK)



When we view the evolution of the brand-consumer relationship through the lens of traditional psychological transactional analysis, we understand that the parent-child relationship that once existed between business and consumers no longer persists. In large part because of the rebalancing of the information dynamic, today this relationship manifests as adult-to-adult or peer-to-peer. The change to this dynamic of the relationship is, in part, what necessitates an evolution of the rapport between businesses and consumers.

Fig. 10: Transactional analysis of human-brand relationship



Challenge this context creates for brands?

How does a brand develop trust in the online world? How can a brand protect its reputation online? How do brands evolve the relationship dynamic to better fit with the times?

Be more...

The blurring of physical and digital boundaries, the ever-present nature of communication, the rapid pace of technological change, the massive volumes of content being produced, and the misguided supremacy of data over decorum guiding interaction, make digital marketing today frustrating for consumers and marketers.

More importantly it's inefficient. Investment is wasted on ads that are a nuisance, poorly articulated content that is viewed suspiciously, and misguided customer service interactions that are unfulfilling.

In 2018 the rules of engagement are beginning to re-establish in part because of the impact of GDPR; in part in reaction to recent censorship controversies, privacy issues, hacker data breaches, and other infringements. Brands will need to be careful to not 'overstep their welcome', lest they continue to risk favour and market share. Brands need to re-examine their relationships with people — what the brand stands for, how they present themselves, what they say, how they say it, and how they behave. But there's hope.

Brands just need to learn to be more... human.



Humanising brands

While not precisely transactional, human interactions do nevertheless have an organic value exchange. Friends fulfil each other's often differing needs. One person may derive value from the social company of another, while that person may find value in the information and advice shared.

Brands just need to learn to be more... human.

Brands are not exempt from the natural 'quid pro quo' of rapport. Like people, brands need to be useful. The moment they are not, people will ignore them. Some brands understand this. However, at Kantar we still see brands in-adeptly insinuating themselves into conversations with consumers. These brands quickly become the entity that 'tries too hard' and references themselves throughout an interaction in an effort to try to raise their status. Not only is this ineffective, it is often counterproductive, leading to resentment.

When brands behave more like humans in a more nuanced way with appropriate intent, demonstration of value, relevance, good timing and emotion, they develop stronger bonds with consumers.

Human brands with high emotional intelligence win.

So, where does a brand start? With oneself! Technology has transformed how we engage with consumers. It has also amplified the opportunities for inconsistencies to come to the fore, so a clearly defined understanding of oneself remains core to great marketing.



Get a life: brand purpose

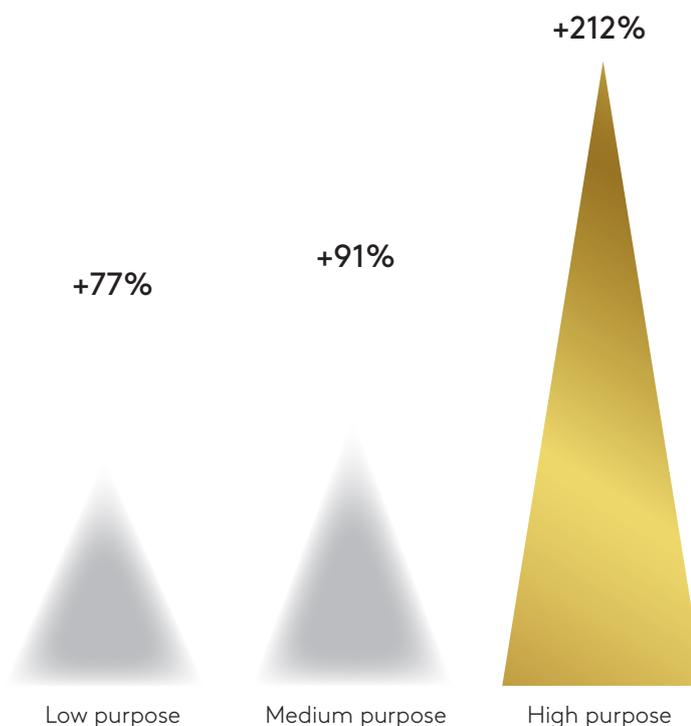
To understand how to better engage with consumers, businesses must start with brand purpose. Brand purpose guides brand choices, including communications and engagement.

Unlike the corporate social responsibility programmes of yesteryear, brand purpose today serves to empower organisations through the concerted focus of efforts around a singular idea that connects core capabilities to a wider social impact - be that to accelerate the world's transition to sustainable transport, like Tesla's, or add colour to people's lives like Dulux. Less about 'do-good' moralism, brand purpose today acts as a corporate compass with practical implications. When brands have a 'why', it focuses resources, guides decision-making, eliminates inefficiencies and inspires innovation. When done right it adds to the bottom line, and does not subtract from it, like CSR of old.

The value of brand purpose to businesses today is no longer questionable; it is quantifiable. BrandZ™ Top 100 Most Valuable Global Brands shows that of the 87 brands evaluated between 2008 and 2018, brands in the top third for brand purpose grew 212% in value, compared to 77% for those in the lowest-scoring third.

According to Kantar Consulting's Purpose 2020, top brands better deliver to all three aspects of brand purpose - functional, emotional and societal. Purpose is key to brand success. The Report maps a brand's journey of discovery to find brand purpose, from purpose as in isolated tactic to purpose as an business-led movement.

Fig. 11: Get a life- brands with a purpose are more successful



Blurring boundaries

Fig. 12: The journey towards becoming purpose-led

PURPOSE AS AN ISOLATED TACTIC PURPOSE AS A SOCIETAL BRAND PROMISE PURPOSE AS AN ALIGNED COMPANY WIDE STRATEGY PURPOSE AS A BUSINESS-LED MOVEMENT



Articulation

5 criteria
 Meaningful
 True
 Unique
 Coherent
 Business-proof

Infusion

4 characteristics
 Leadership-driven
 Culture & strategy led
 360 executed
 Impact measured

Amplification

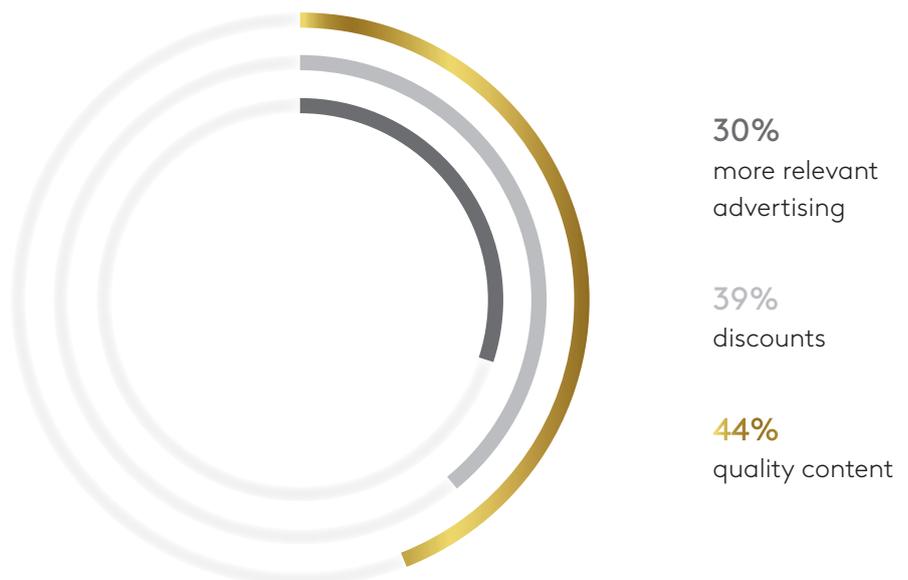
4 characteristics
 Leadership-driven
 Culture & strategy led
 360 executed
 Impact measured

Although brand purpose may sound 'wu-wu' to the unacquainted, enduring brands like Apple, Disney and Nike demonstrate the lasting value it can provide. Make no mistake, brand purpose today creates the opportunity for a 'triple-win' for business, consumers and society. This is no more apparent than in how purpose can help in reshaping fundamental business models.

Although brands can succeed through monopolisation, domination or adoration, the latter is often most controllable, and thus sustainable. Currently, the equation that forms the basis of trade between some brands and their consumers is unstable. Yet DIMENSION 2018 informs us that 30% of consumers don't mind providing a website or social media network with information about themselves, if it means that the advertising they see is more relevant to them. This suggests that some consumers both understand the trade-off between data and personal benefit, and are willing to negotiate this type of exchange. This figure rises to 39% when the incentive is discounts and 44% when the trade-off is quality content on a visited website.

However, since a sizeable portion of people are not interested in trading their personal information, these findings also suggest that perhaps a one-size-fits all model will leave some consumers unhappy. Consumer brands may find that their business models need to evolve in response to new conditions to better align with consumer value-exchange expectations. A well-developed brand purpose can provide useful structure.

Fig. 13: Quid pro quo balance





Be nice: emotional territory

No one likes a 'timewaster', a 'loudmouth', a 'user', 'a fake', a 'narcissist', or a 'frenemy'. So why do many brands act like socially-awkward people with bad manners? How often have we heard from brands that communicate boring, unimportant information or act as if they are the centre of our lives.

Successful communication relies on self-regulation, including choosing the right moment and framing the message in a way that is pertinent to the listener. Brand-to-human communications are no different. Yet all too often brands choose an inappropriate moment or communicate irrelevantly. Whether communicating with consumers via TV in advertising, online via social media or face-to-face through customer service employees, the rules of communication are the same.

Fig. 14: Be nice- emotional consistent interaction



Brands need to learn when to shut up and listen, and when it's their turn to talk. Sometimes less is more.

Adding to the problem of unpleasant brands are the macro forces we've reviewed: a fragmented media environment, 'always on' communications, high ad volumes, a crisis of trust, and algorithmic anarchy. But another contributing factor – incoherent experiences – is within the control of businesses. Key to building equity, brands today struggle to orchestrate emotionally consistent consumer interactions across touchpoints. Once a brand appreciates its purpose and understands 'who it is' and 'what it stands for', then it must decide how it will express itself.

No one likes a 'timewaster', a 'loudmouth', a 'user', 'a fake', a 'narcissist', or a 'frenemy'.

What a brand says is dictated by communications strategy, but how it executes on that strategy — how it communicates and how it behaves is best dictated by a brand's emotive territory.

When brands drive consumer interactions and experiences from a defined emotive territory, they are more likely to communicate and behave in a consistent manner across touchpoints. This gives brands consistent emotive articulation, which creates stronger bonds with consumers, enriching the brand-consumer relationship. Regardless of whether or not you think Apple sell the best personal electronics products on the market, they do mindfully deliver a uniform emotive brand experience across touchpoints, whether advertising, product design, packaging or in-store environment. This is driven by connecting brand purpose to emotive promise and a focus on the dynamics that best align with the brand in type, tone, timing, intent, relevance and expression.

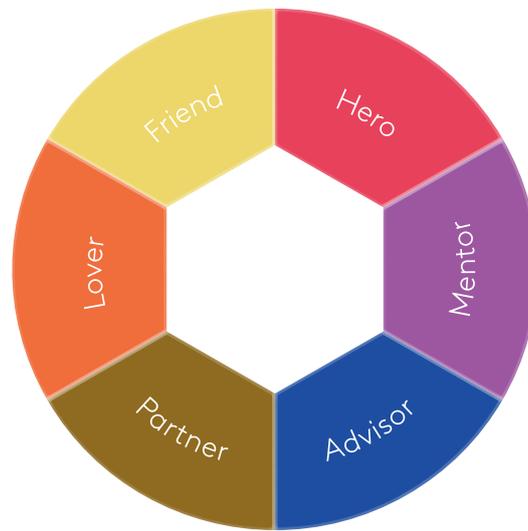
Many brands focus on short-term goals, e.g. category share-of-voice, and miss the more important long-term objectives of brand equity and market share. Brands with clear emotive expression have greater consistency and tend to avoid bad manners mistakes. Kantar TNS NeedScope™ program, which serves as a guide to help businesses make sense of the myriad of brand experience options, has identified a direct correlation between emotive consistency and market share. Analysis shows that brands that have high emotional coherence have twice the market share of their competitors.

To interact with consumers in the right moment, it can be helpful for businesses to understand which of the different types of rapport makes strategic sense, based on a brand's emotive territory, heritage and communications strategy. Is your brand 'a friend', a 'hero', a 'mentor', an 'advisor', a 'partner' or a 'lover'? A brand that acts like a 'friend' is going to permit people personal access to them.

This might mean real human responses within a short period of time, at the end of toll-free lines and online. A 'partner' brand may present their strengths but may also show vulnerability and admit to mistakes. Such brands would be unlikely to heavily edit their social media feeds.

A big part of being human is being empathetic and appreciating the perspectives of others. Brands that select moments of interaction carefully and deliberately are likely to reap longer term advantages. Finally, brands will need to build human trust through authenticity, openness, transparency and follow-thru.

Fig. 15: What type of brand are you?



Critically, channel and programmatic strategy must also align with a brand's emotive territory and communications strategy to create a holistically consistent experience. When an otherwise adept brand executes contextually-poor advertising for example at the wrong time or in the wrong place, it is the equivalent of being an 'interrupter', someone who chimes into a conversation with a non-sequitur. The best that a person or a brand who makes this mistake can expect are blank stares and a redirect. The worst is social exclusion or retribution. Unsubscribing audiences and negative social media is counterproductive.

This serves to emphasise the importance of ensuring that the introduction of artificial intelligence, e.g. chatbots etc., must align to the brand's emotive territory to ensure they consistently improve customer experience.

Saïd Business School, University of Oxford, carried out a meta-analysis of 235 campaigns for 110 brands running on Facebook and Instagram, using proprietary data from campaign effectiveness polls carried out by Kantar Millward Brown. They then conducted natural language processing analysis on the same brands' own posts on Facebook and Instagram.

Researchers concluded that brands that use human language (e.g. not just functional words) in their social media posts showed a very strong correlation with the ad campaigns that had better outcomes in metrics like brand saliency, associations and motivations. So, brands that act human and get it right tend to also be the ones that have better performing ads.

Businesses that listen as much as they talk are not only rewarded with more effective touchpoints, but organisations that have a customer experience focus that includes the emotional, also benefit from better innovation.

Fig. 16: How to be human

	Saliency	Associations	Motivation
More personable			
More emotional		No direct effects, but likely to see increases through increased saliency	
Less functional			

Case Study

In 2004 LEGO™, the Danish plastic toy block maker, suffered its first ever quarter of negative growth. Thinking it would bring in new customers, the business pursued a strategy of co-branding with movies and comic books, producing play sets that required little construction. Unfortunately, this betrayed the brand’s purpose and emotive promise – to inspire the creative builders of tomorrow. As a result, alienated core users splintered off into their own independent communities.

However, it was these groups that reminded the brand what they were about. With a new-found purpose the brand stopped manufacturing the easy-to-build, directive sets with few pieces and poor cross product compatibility, and instead began supporting LEGO™ fans. Tapping into the passion and dedication of this groups, LEGO™ realised the best strategy would be work with them cooperatively, as an informal thinktank. The brand created prizes and even positions within the company for people from the community.

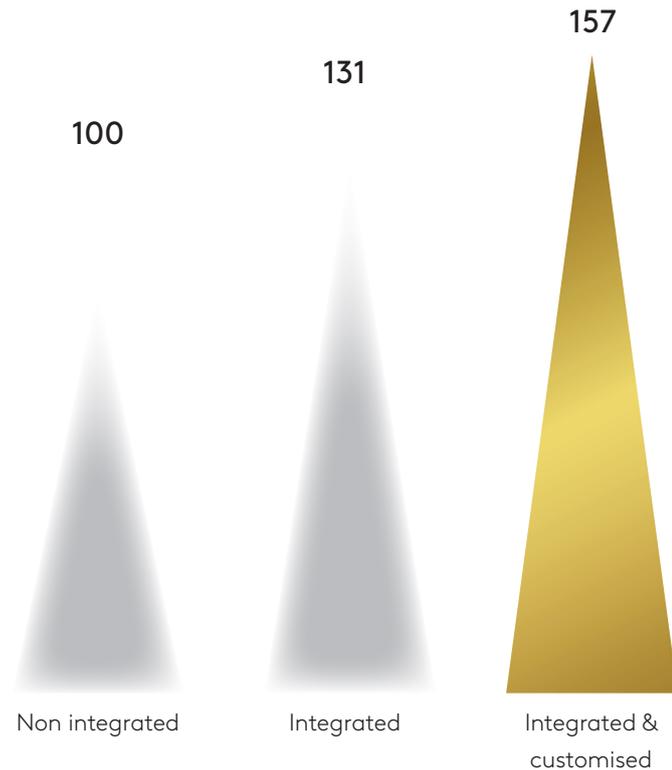
They established product competitions where the winner’s design was produced by LEGO™. The brand benefited from greater strength in the innovation pipeline and returned to positive growth. Why? Because they had rediscovered their brand purpose.



Benefit of synergy

When brands are emotively (and functionally) consistent across touchpoints the benefit is synergy, where interactions deliver greater impacts than the sum of their parts. Global analysis from the Kantar Millward Brown CrossMedia database for AdReaction shows that integrated campaigns are 31% more effective at building brands. Campaigns that are both integrated and customised are 57% more effective. Brands need to keep an eye on the bigger picture, understand the experience that their communications ecosystem creates and use synergy to their advantage.

Fig. 17: Integrated & customised campaigns benefit



Gaining clarity as boundaries blur

Technology is changing the environment in which brands operate today, and how organisations engage with people will continue to dramatically evolve, but it isn't changing the rules of modern consumer-brand relationship. More than ever, it is important that brands focus on the fundamentals of consumer relationship-building. This starts with an understanding of one's purpose and emotive space.

Only when brands understand these fundamentals – what to say to which consumers, where to say it, and when- can they be useful. We can help brands build lasting relationships and loyalty by being more human. Success requires the integration of functions towards common customer experience goals.

Blurring boundaries

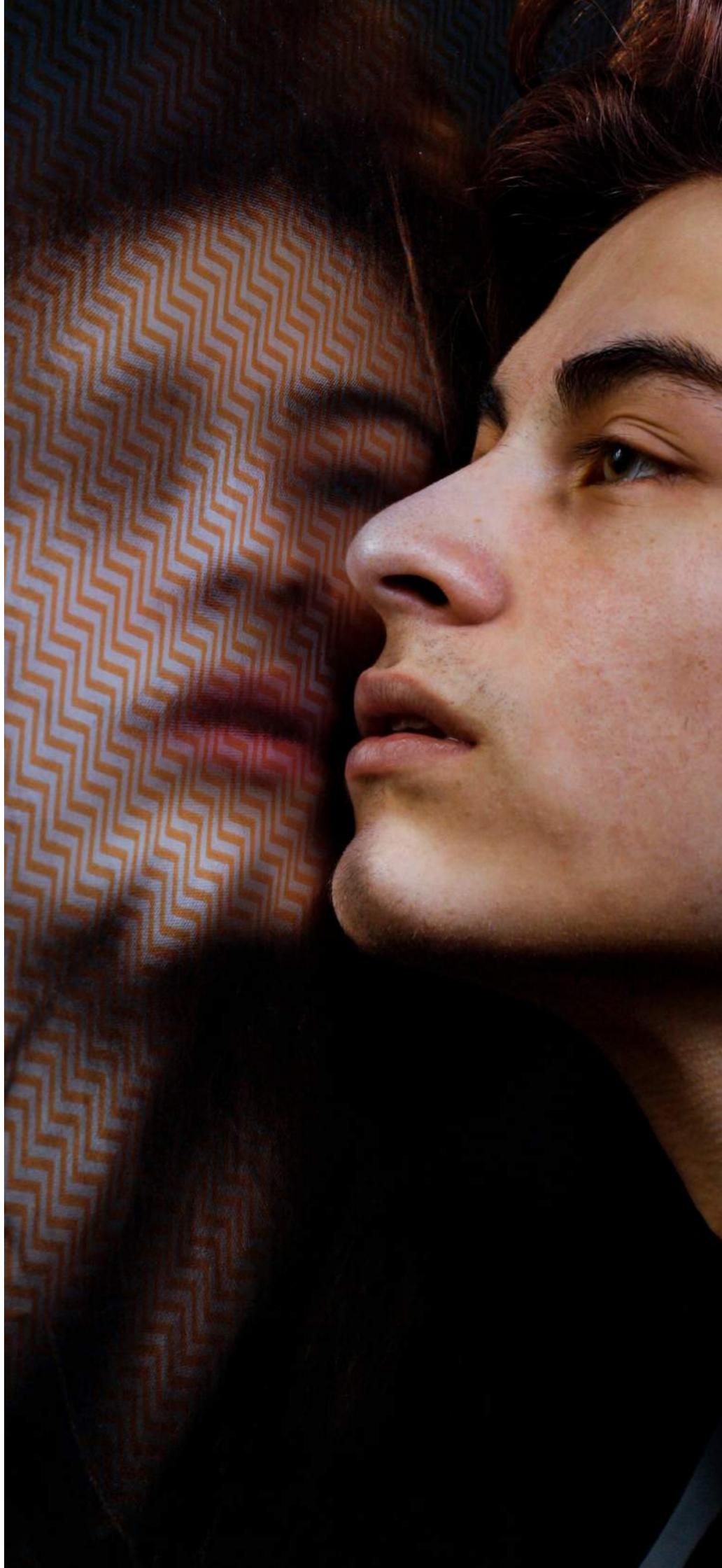
Counterintuitively, technological developments bring a greater emphasis on brand. We already see evidence for greater trust in smaller, niche brands in some developed markets which may deliver better-designed, personalised and predictive experiences. The size and scale that once delivered rewards to multinational organisations may soon no longer be an advantage as business growth becomes more driven by concepts of demand and less the logistics of supply.

Forces are changing the dynamics of the relationship between people and brands. Individual opinions may differ on the ideal nature of the human-machine relationship, but the ethics of acceptability will be determined by society at large. The borders are yet to be fully negotiated. But Kantar has the experience, expertise and tools to help clients adjust to blurring boundaries.

Lead Author:

Amy 'Fritz' Fridlund - Global Lead
- Content Creation & Activation at
Kantar TNS

Thank you to the following people for their contributions: Jane Ostler, Nigel Hollis, Jon Puleston, Graham Staplehurst, Zeynep Kasap, Mikayla Samuels, Dan Jenkins, Sarah Sanderson, Katherine Diaz, Kerry Corke, Andrea Morris, Yu Tatt Chong, Mamta Singh, Tara Prabhakar, Kyle Finlay, Colin Ingram, Lenette Sheridan, Tilman Woerz and Maren Seitz.



KANTAR

KANTAR CONSULTING

KANTAR HEALTH+

KANTAR MEDIA

KANTAR MILLWARD BROWN

KANTAR PUBLICS

KANTAR TNS+

KANTAR WORLD PANEL

LIGHTSPEED

About Kantar

Kantar is one of the world's leading data, insight and consultancy companies. Working together across the whole spectrum of research and consulting disciplines, its specialist brands, employing 30,000 people, provide inspirational insights and business strategies for clients in 100 countries. Kantar is part of WPP and its services are employed by over half of the Fortune Top 500 companies.

For more information visit
www.kantar.com

For enquires:
kantar@axicom.com

www.kantar.com

©2018 Kantar. No part of these materials may be used, reproduced or adapted without the prior written consent of the copyright owner.

All rights reserved.

KANTAR

BOUNDARIES