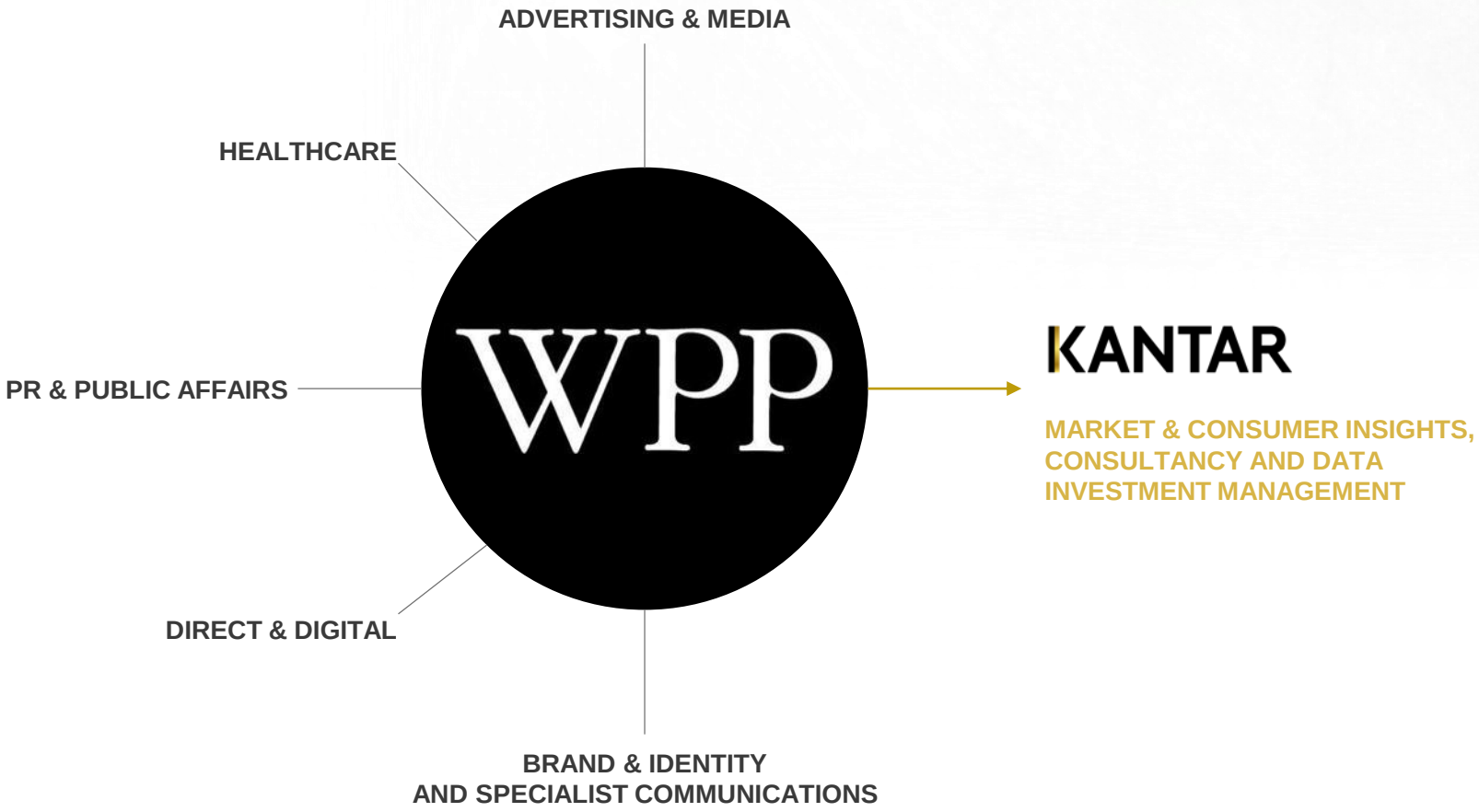
KANTAR

Inspiration for an Extraordinary World

A major part of WPP, the world's largest marketing communications group



We have 30,000 staff with the global and local understanding to meet your needs

Albania
Algeria
Argentina
Armenia
Australia
Austria
Azerbaijan
Bahrain
Bangladesh
Belgium
Bolivia
Bosnia and Herzegovina
Brazil
Bulgaria
Cambodia
Cameroon
Canada
Chile
China
Colombia
Costa Rica
Croatia
Czech Republic
Denmark
Ecuador
Egypt
El Salvador
Estonia
Finland
France
Georgia
Germany
Ghana
Greece
Guatemala
Honduras
Hong Kong
Hungary
India
Indonesia
Ireland
Israel
Italy
Ivory Coast
Japan
Kazakhstan
Kenya
Kosovo
Kuwait
Latvia
Lebanon
Libya
Lithuania
Luxembourg
Macedonia
Madagascar
Malaysia
Mauritius
Mexico
Moldova
Mongolia
Morocco
Myanmar
Netherlands
New Caledonia & French Polynesia
New Zealand
Nicaragua
Nigeria
Norway
Pakistan
Panama
Peru
Philippines
Poland
Portugal
Qatar
Reunion Island
Romania
Russia
Saudi Arabia
Senegal
Serbia
Singapore
Slovakia
South Africa
South Korea
Spain
Sri Lanka
Sweden
Switzerland
Taiwan
Tanzania
Thailand
Tunisia
Turkey
Uganda
Ukraine
United Arab Emirates (UAE)
United Kingdom
Uruguay
USA
Venezuela
Vietnam

All other countries can be fully serviced via this global network.

We leverage our scale

2nd

We are the 2nd largest research company in the world and the number 1 in all the BRICS markets

>50%

We work with over half of the companies in The Fortune 500

17/20

We have been working with 17 of our Top 20 clients for over 20 years (the other 3 didn't exist 20 years ago!)

14 billion

Our 5 year old archive contains 14 billion social & traditional media posts from 124 countries & in 86 languages

80 million

We conducted over 80 million consumer conversations across the world last year

5.5 million

We have 5.5 million online panelists in 38 countries

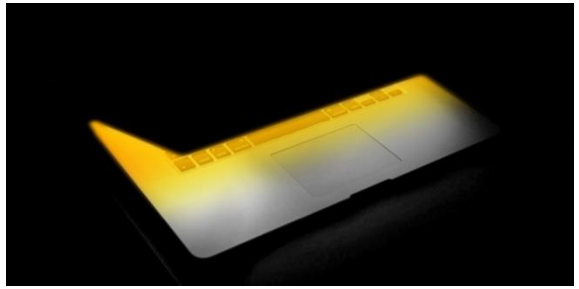
1,200

We provide the retail trends of today and prepare for the realities of tomorrow with analysis of over 1,200 key retailers across 135 markets

92% & 96%

We conducted brand and communications research for 92 of the world's largest 100 advertisers. We also track 96% of all global advertising spend across all media types

We combine leading-edge technology with expert consultancy to deliver powerful insights

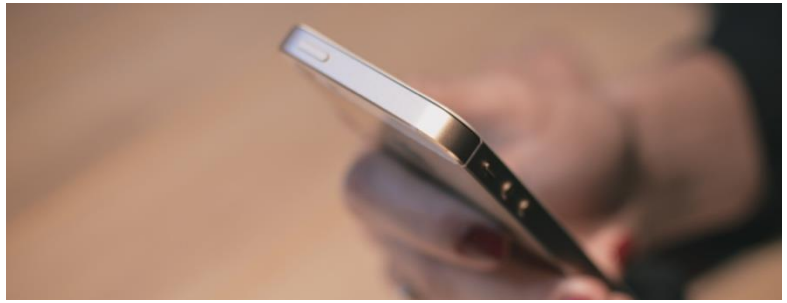


Proprietary technologies
Online and offline media analytics for insights, measuring marketing investment and brand growth

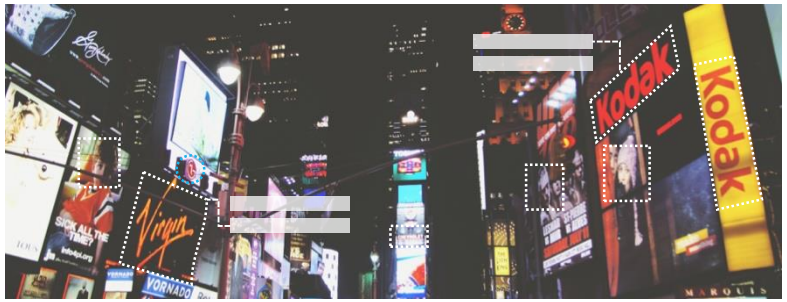
Online communities
Technology for fast co-creation with consumers and access to real-time conversations

Bespoke Mobile technology
Analytics to understand consumers' mobile moments & passively monitor behaviour

Emotion detecting technology
Including facial recognition for branded digital applications, content, comms, pack and editorial testing



Mobile barcode scanning
To monitor brand purchase behaviour & adoption of innovation



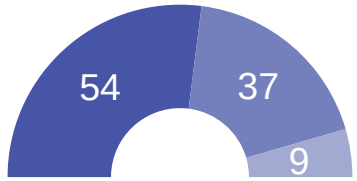
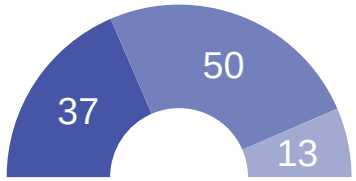
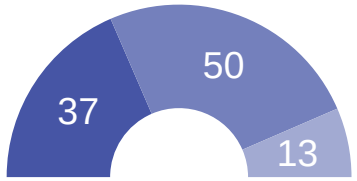
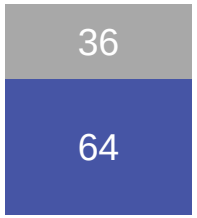
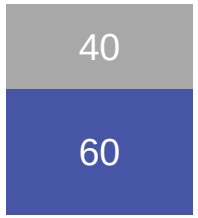
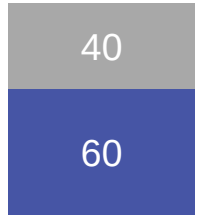
Recognology Scaled image coding
For real-time automated insights

Mobile App + Web
For extended reach, fast accurate insight collection

How digital are the consumers in the United States?

What about consumer values?

How digitally connected are the US Consumers?

	Global	N. America	USA
Daily device hours	5.0	5.9	5.9
Share of time on devices: (%)			
Share of time on different mediums: (%)			

Mobile PC Tablet

Traditional (TV, radio, print)

Digital (PC, mobile, tablet)

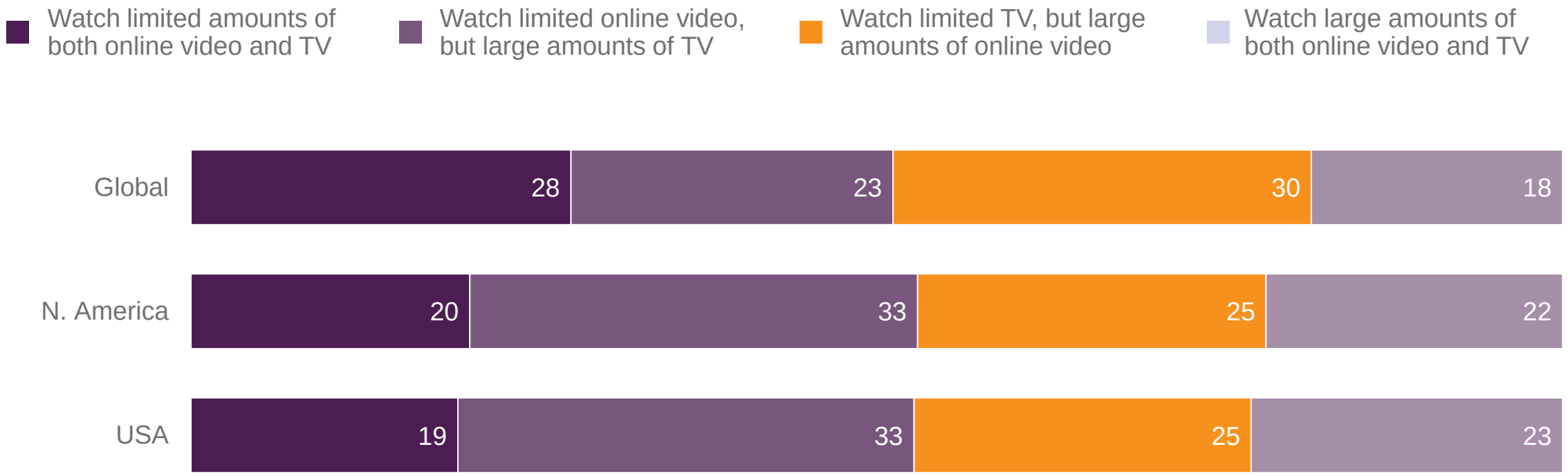
Source: Various – see notes for full definitions

Base: Global (72067) | N. America (4049) | USA (3037)

What proportion are moving away from traditional TV?

Online video viewer type penetration

%



Source: (D3) Time spent on media/activities
Base: Global (72067) | N. America (4049) | USA (3037)

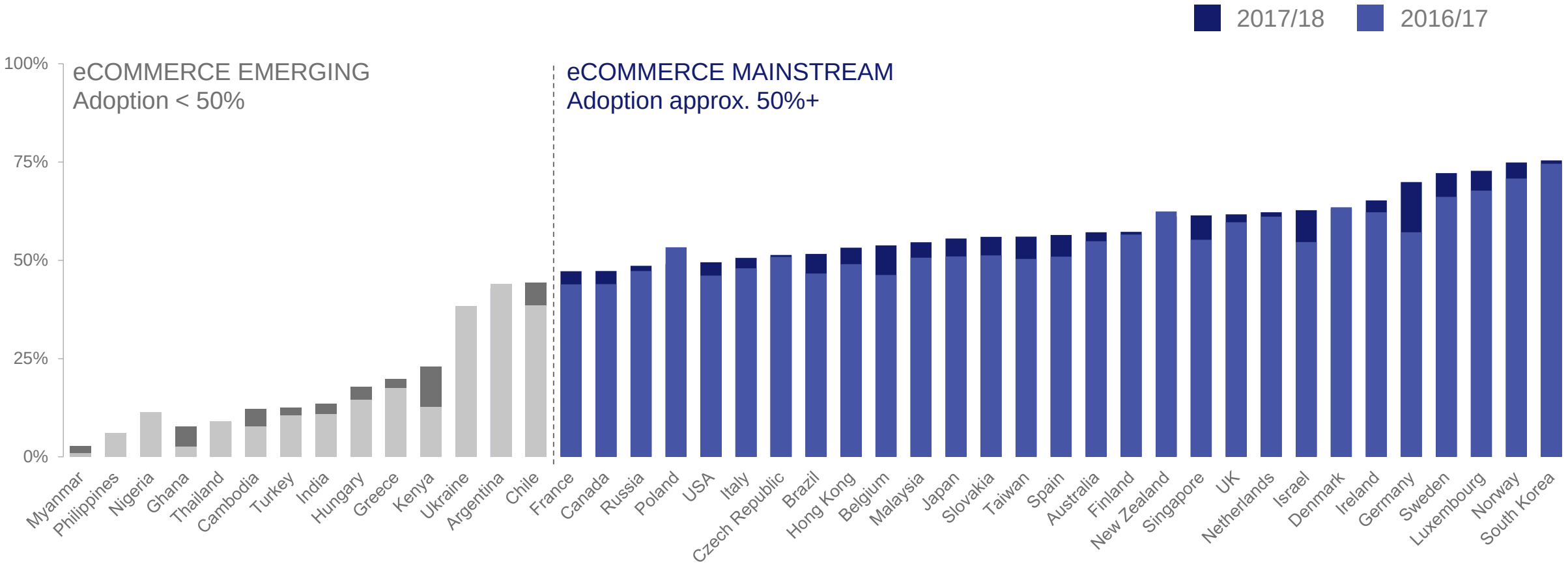
Beware of clichés – the connected world is building upon traditional ways of marketing, not killing them

The change – connectivity trend	**The cliché –** what's 'dying'?	**The implication –** reality check
Media migration	Traditional media	Balance online/offline channel approach
Rise of online video	Television advertising	Complement and boost TV content with online video
Social media growth and fragmentation	Effective targeting	Use data insight to prioritise device and social platforms
Ad blockers	Digital advertising	Brands must deliver relevant content in the right moments

Cutting through the hype requires a comprehensive view of the activities your target is doing online, and on what devices, in order to reach them in the right way.

How is increasing connectivity moving shopping online? What barriers still remain?

Total market incidence of eCommerce
%



KANTAR TNS

Source: G3 products bought online (any product)
Base: All respondents * total internet penetration

Plan your route to your customer carefully

Those who are online the most don't simply want 'more of everything digital'

So what defines their behaviour?

The most digitally active customers are often the most discerning

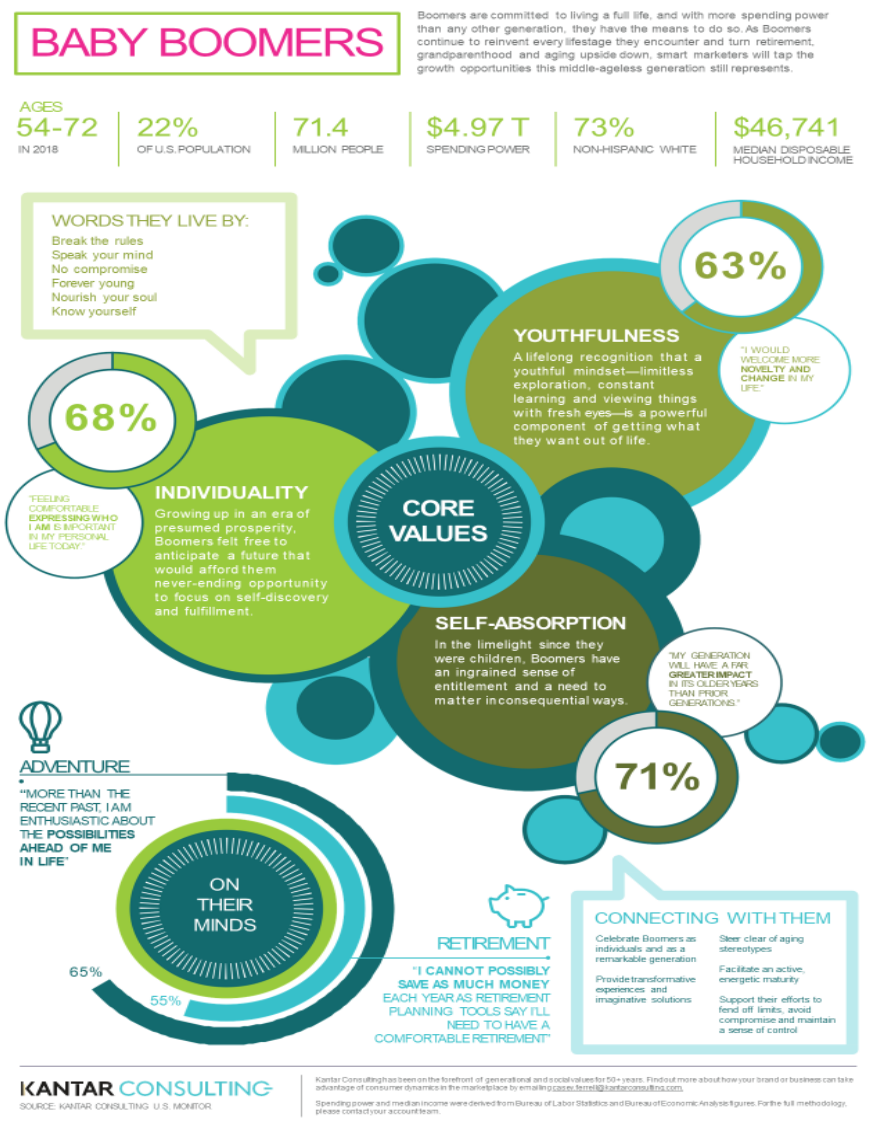
…and their attention is potentially hardest to grab

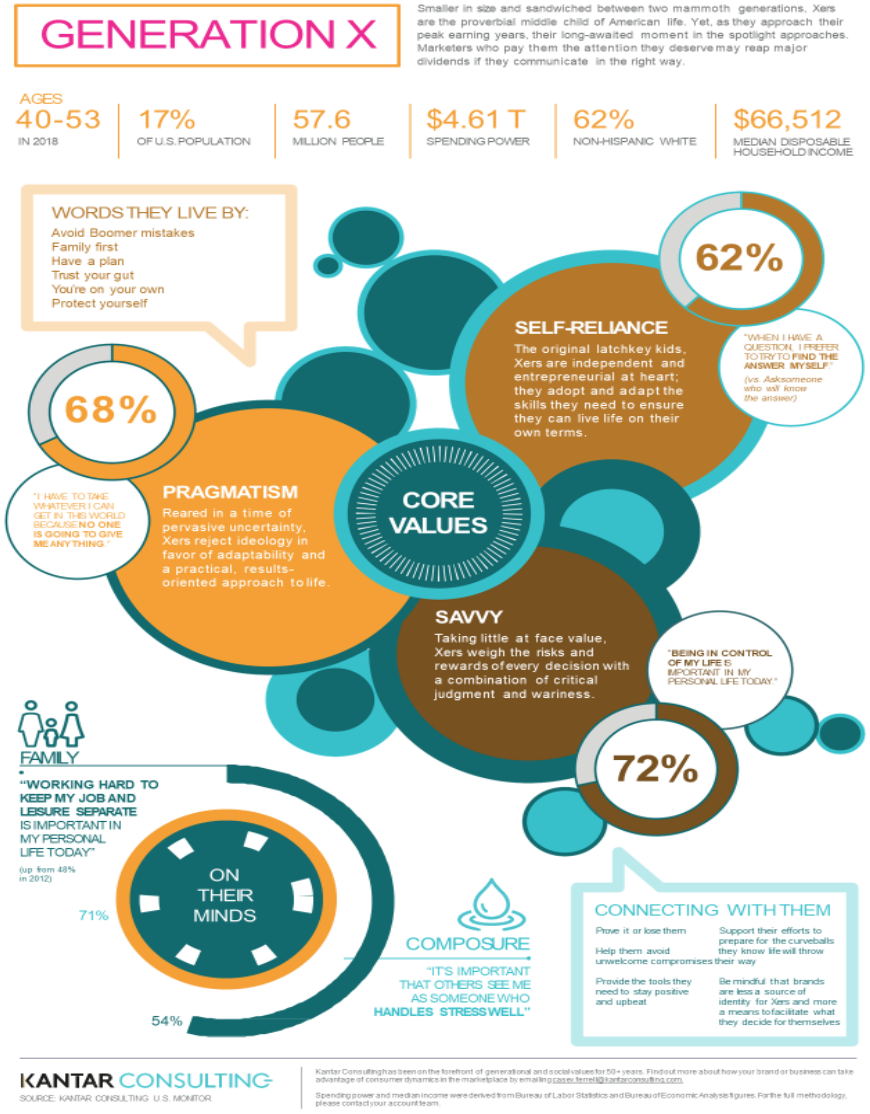
Conclusion: Don't rely on lazy demographic stereotypes

Even inside a target group, there can be a huge diversity of behaviour and attitudes

Generations have different values

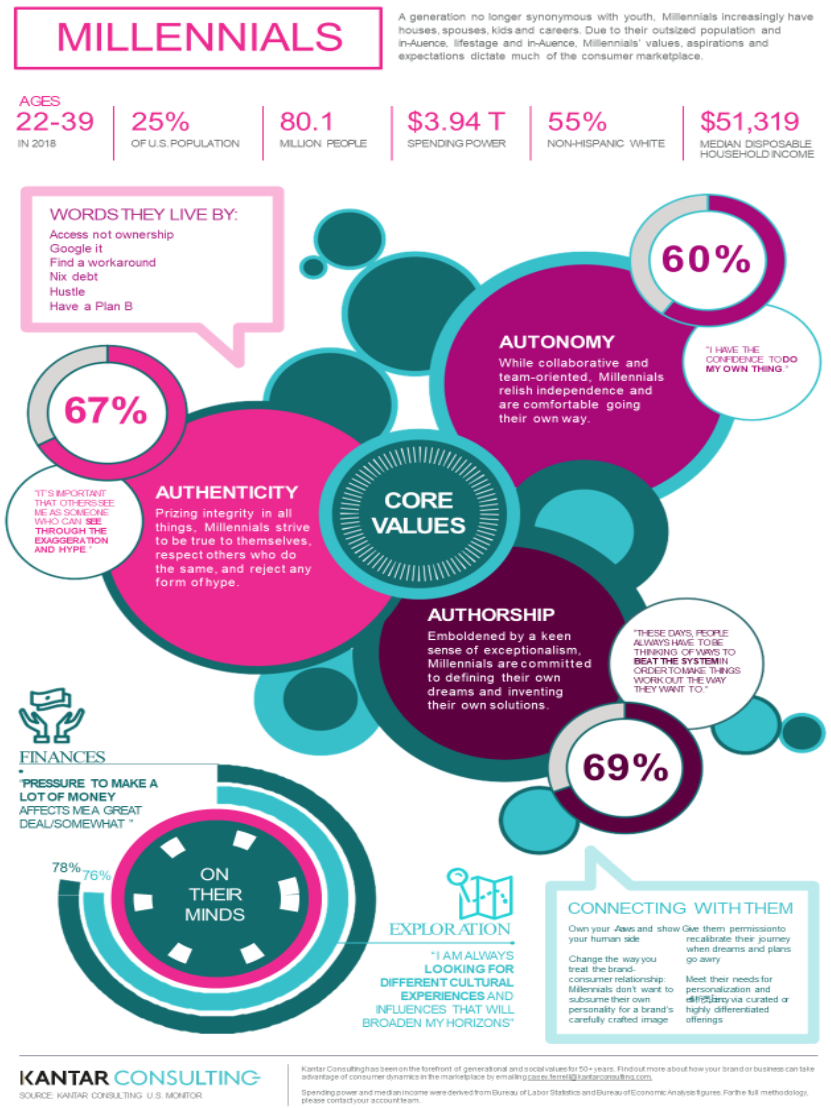
(1)

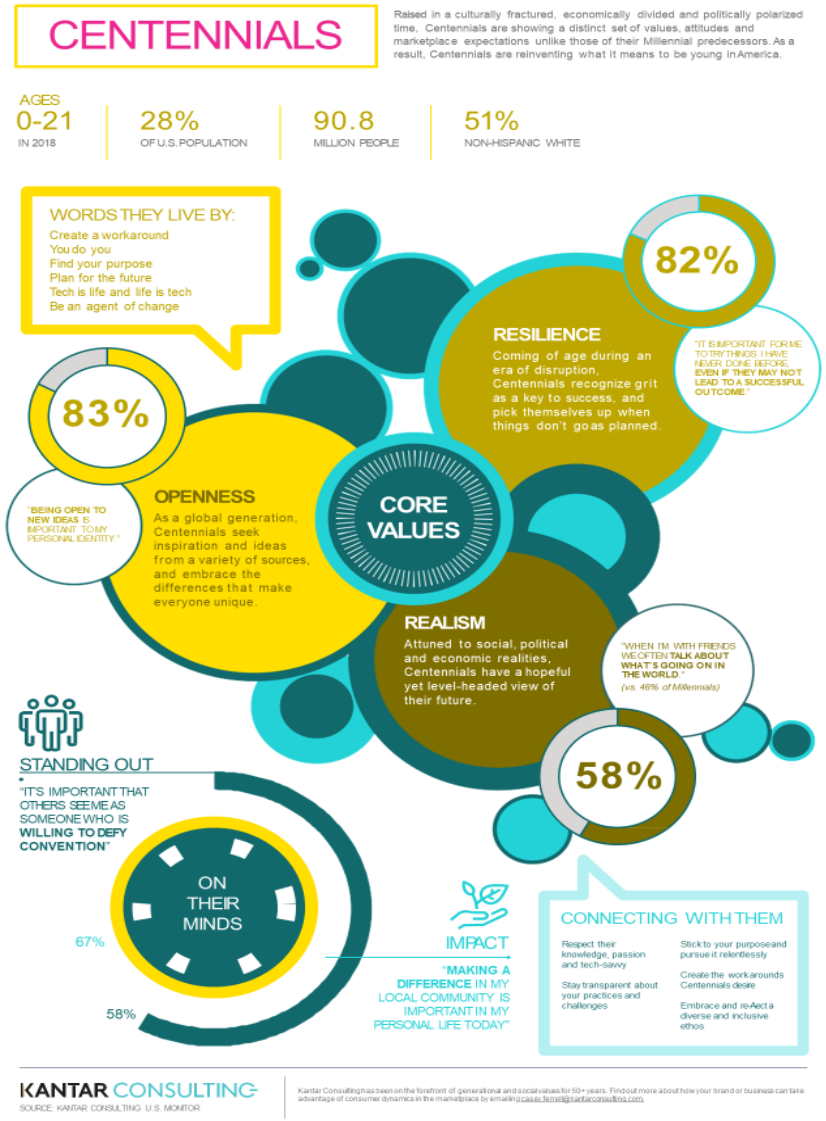




Generations have different values

(2)





Test before Invest !

Reach out at Kantar in Bulgaria for US and global Consumers and Customers research and data

- Test consumers acceptance for products, services, branding and prices before investing in the market
- Surveys on shopping and retail channels Consumer preference, including e-commerce
- Build marketing & media and advertising mix strategy, based on Consumer data
- Global US Monitor for data and insights on US Consumers

Marchella Abrasheva

Regional Director Kantar South East Europe

marchella.abrasheva@kantartns.com
D +359 2 4224 957
M +359 888 441110