



KANTAR

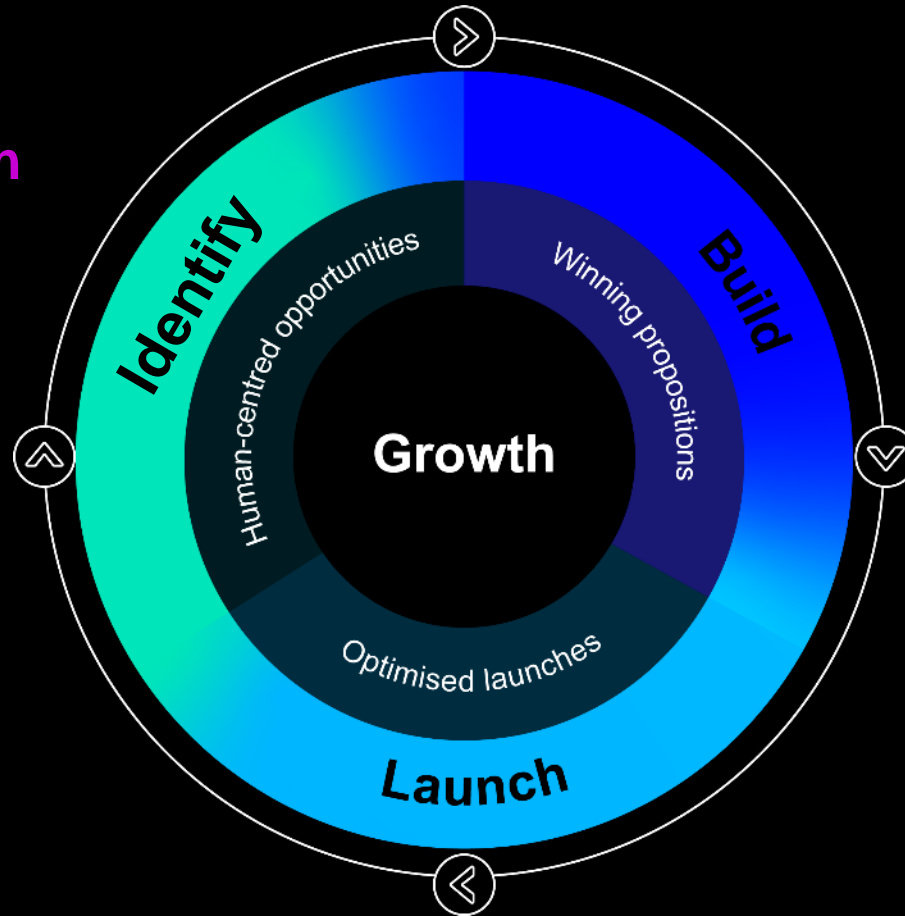
DAY 2

How to find the best Opportunities for Innovation

October 2023

A framework, which mirrors this philosophy

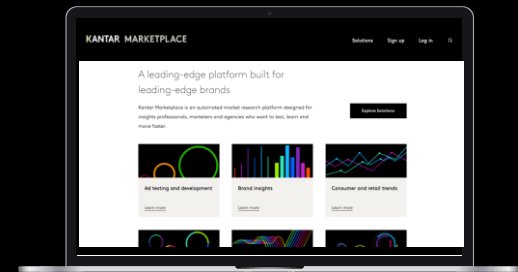
Identify: Learn
Understanding people and context
Understanding data



Launch: Learn
We support you to monitor, course correct and optimise with our Innovation Guidance System

Build: Test and learn

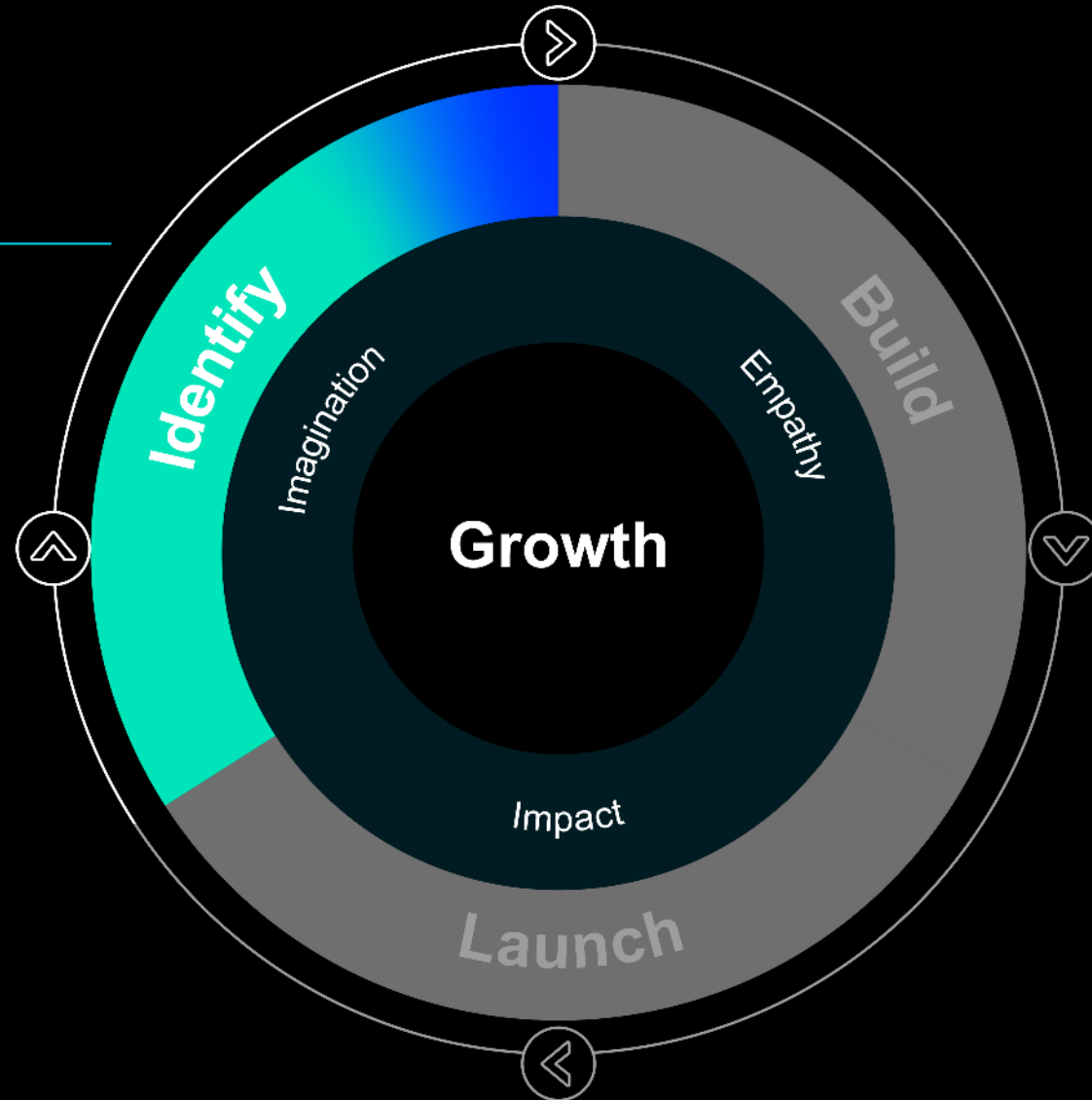
We are redefining agility with Kantar Marketplace an automated market research platform

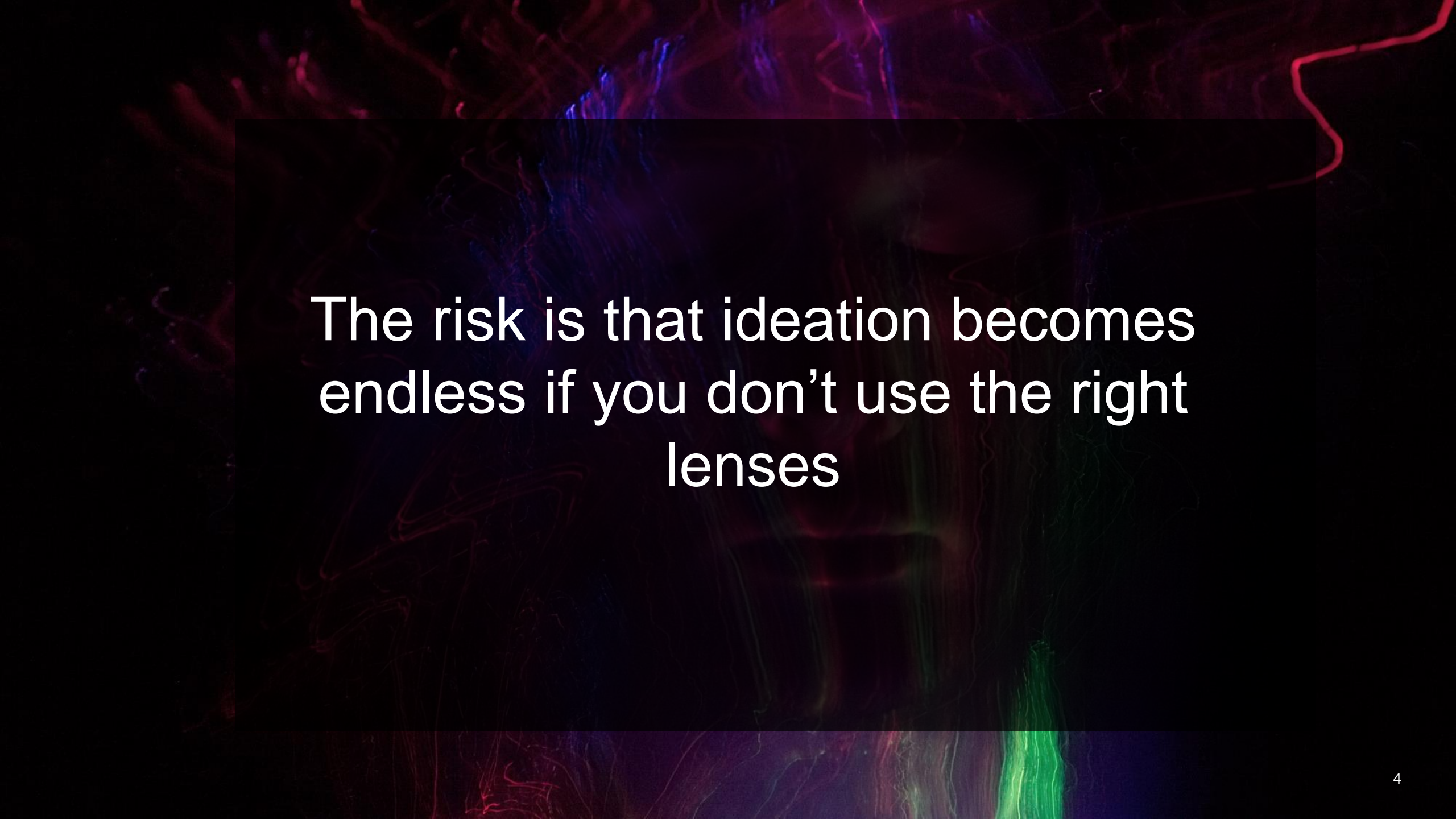


New **in-context** development: learn about propositions in a real world context

Identify where to play

Unpack opportunity by exploring
Outside In and Inside Out lenses:



The background features a complex network of glowing, multi-colored lines in shades of red, purple, blue, and green, resembling a neural network or a data visualization. These lines are set against a dark, almost black background. A large, semi-transparent dark rectangle is centered on the page, containing the main text.

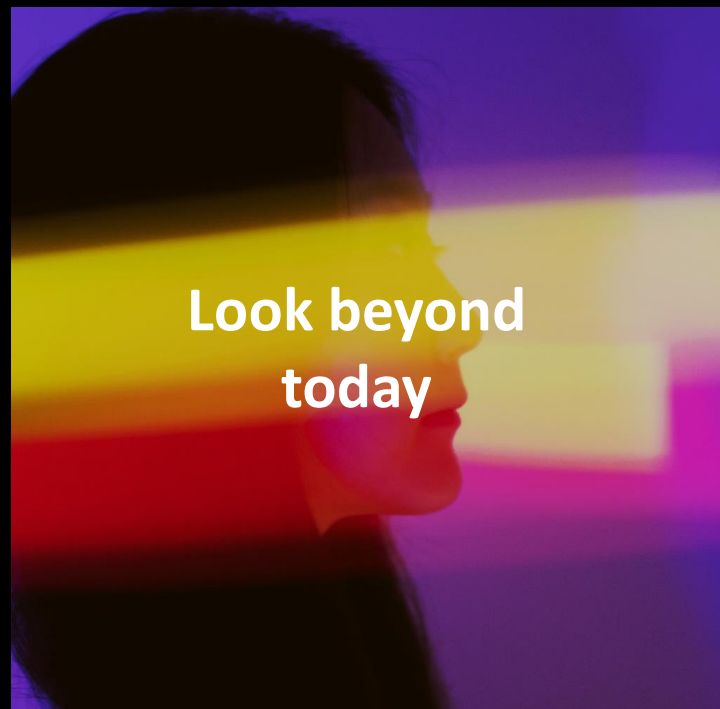
The risk is that ideation becomes
endless if you don't use the right
lenses

Inspired innovator are looking at the world through 3 lenses....

What is now



What's to come



What is happening around us

Healthcare experience had not caught up with broader consumer expectations.

Projecting that discontent with long waits to see a doctor was only likely to grow.

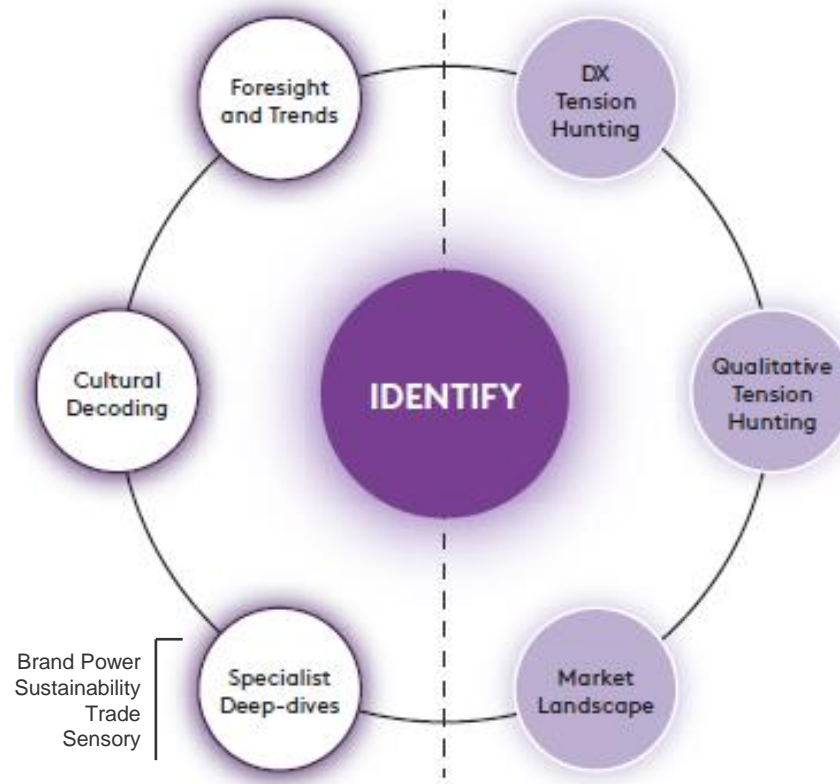
New services app to allow people to book a video call with a doctor quickly and efficiently

Kantar 'Inside Out and Outside In' Approach Response

Anticipate innovation white spaces that drive real growth

Outside In

Thinking seeks to expand your frame of reference, exploring how people's lives and attitudes are changing, and how other categories have been re-imagined.

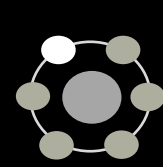


Inside Out

Thinking that takes account of your brand's current power and potential, then envisages something better.

Trends and longer-term futures

Outside In
Inside Out



Foresight
and Trends



MONITOR Surveys

Ongoing proprietary quantitative research tracking the evolution of consumer values and attitudes across multiple markets.



Cultural Streetscapers

A global network of trend-spotters providing a constantly updated feed of fresh cultural, consumer and marketing insights.



Kantar World Panel

Pinpoint and value size competitive moves that are getting traction in market

Global Monitor (1)

Our work starts with a robust view of **Forces of Change** that create innovation opportunities in the world



Outside In
Inside Out



Wellbeing

A person meditating with hands in a lotus position.

World Ranking: 1, Country Ranking: 4

Protection

A glowing padlock on a digital grid.

World Ranking: 2, Country Ranking: 1

Convenience (Flow)

A wireframe animal shape on a dark background.

World Ranking: 3, Country Ranking: 2

Identity

A smiling couple embracing.

World Ranking: 4, Country Ranking: 3

Eg: wearable devices / collective security

Eg: Use of AI / mobility

Eg: women rising / Gen Y

Connections

A couple running on a beach.

World Ranking: 5, Country Ranking: 5

Experiences

Abstract blue and red curved lines.

World Ranking: 6, Country Ranking: 6

Responsibility

A path through a forest.

World Ranking: 7, Country Ranking: 7

Simplicity

A close-up of a textured surface.

World Ranking: 8, Country Ranking: 8

Eg: Digital Intimacy / fostering facetime

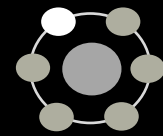
Eg: Immersive excursion / VR

Eg: de-branding

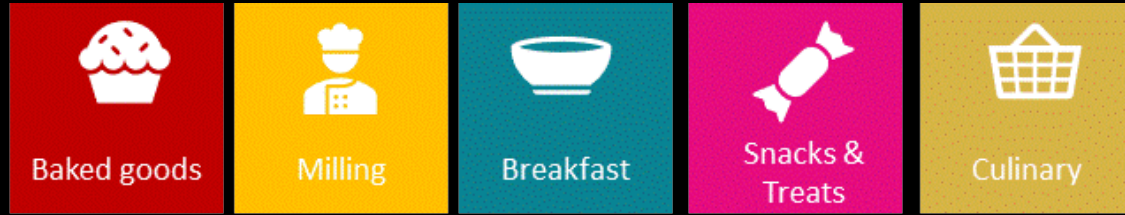
Eg: de-branding/ simple tech

Global Monitor (1)

Outside In
Inside Out



CATEGORIES



FORCES



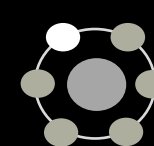
ILLUMINATE

Intersecting these forces
with your categories creates
an actionable **framework to**
guide your innovation

Heatmap of opportunities

Cultural Streetcapers – what is it?

Outside In
Inside Out



Streetscapes is Kantar Consulting's Network of global cultural correspondents.

Streetscapers observe, interpret and report on what's shaping their marketplace, helping clients learn from the leading edge of culture and switch on growth.

The Streetscapes Microsite is a **dynamic feed** of global marketplace discoveries from our **Streetscapes Network** that signal evolving consumer values.

Streetscaper Typical Careers with Proven Cultural Influence

- *Journalists & Writers*
- Tech & Lifestyle Bloggers
- Media & Marketing Strategists
- Designers (print, digital, video)
- Fashion Consultants
- Entrepreneurs

Has a portfolio, website, blog, Twitter, Instagram, etc., with relevant following or esteem, exhibiting their vision and skills.

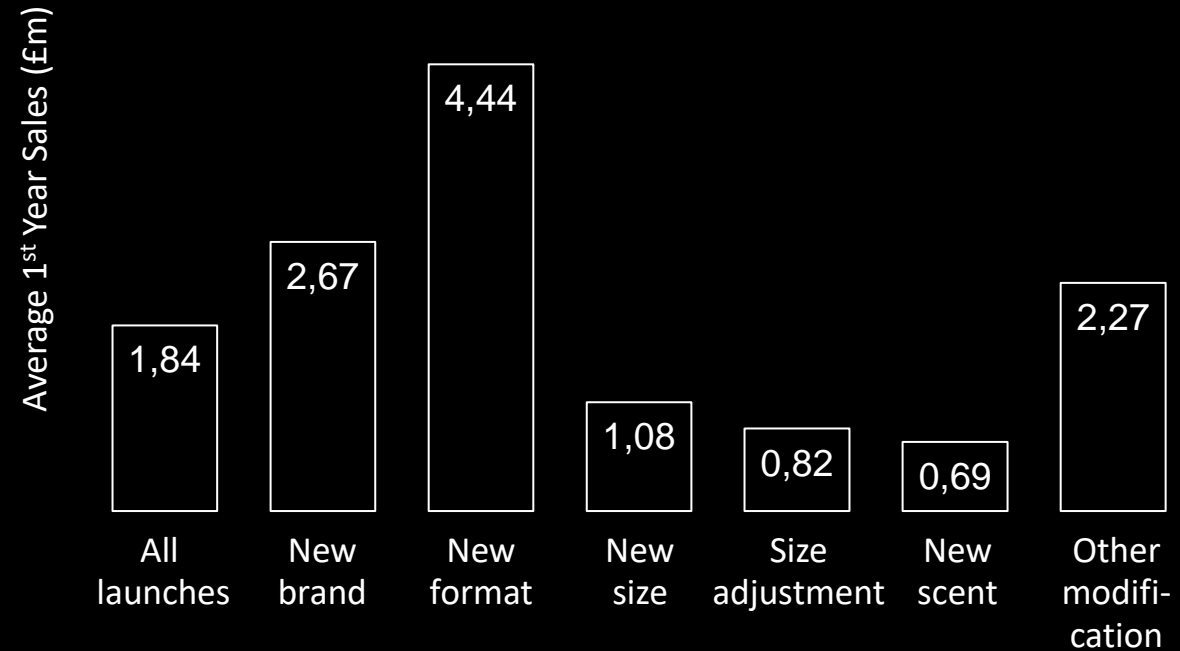
Pinpoint and value size competitive moves that are getting traction in market

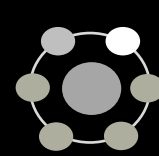
Monitor how well new launches in your category or adjacent categories are performing to identify the growing factors of success and typical benchmarks for total value and incremental value.

The timely adoption of emerging benefits is also conducive to success. So being agile as a fast-follower is good way to keep momentum, generate short term growth and protect revenues.

What type of innovation works best in your category?

size of new launches in an example category, by type of launch



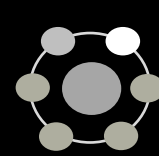


Dx Analytics

Discover What Others
Cannot

Introducing DX analytics to unveil Opportunities

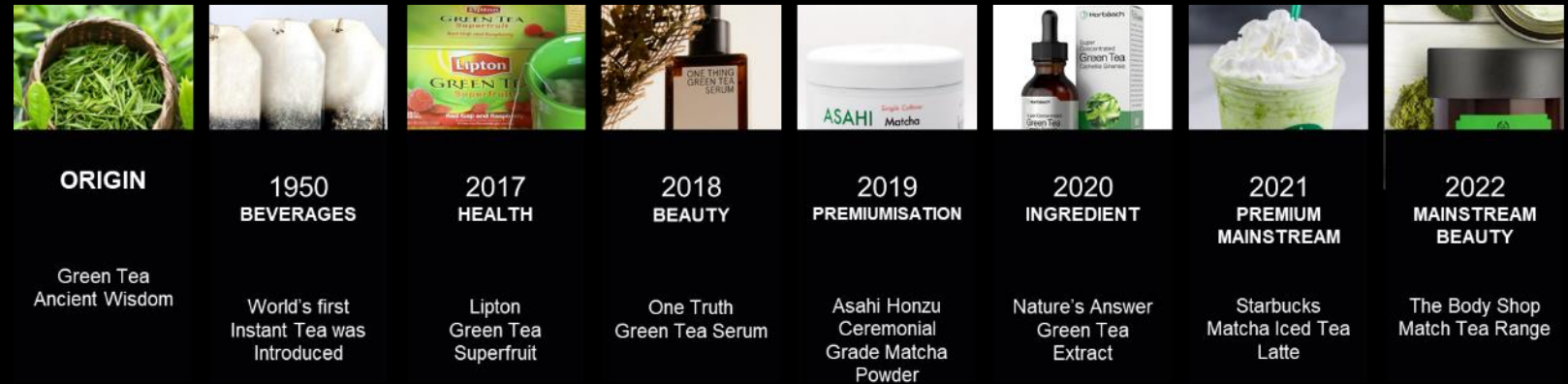
What can search data tell us about potential trends? How can we leverage digital data to predict the next big thing? Discover how your organization can use DX analytics to predict the future of your business and category.



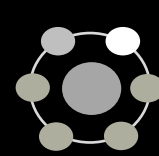
Track ingredients as they cross categories

WHAT ARE THE OUT-OF-CATEGORY INGREDIENTS & TRENDS TO KEEP AN EYE ON?
From Beverages to Beauty – and everything in-between

6-year evolution of Green Tea, reveals how a trend or ingredient can travel from one category to the next



While the exercise has been done for an established ingredient, consider the advantage that a brand could have if they were able to latch on an innovation with an ingredient like that?



Track trends as they travel

For global brands, Social & Search data can enable future-readiness when developing market strategy or can help accelerate launches and expansion through more dynamic readiness signals.

Through advanced Search analysis, we can track market maturity in terms of trends

MUTED COLOURS SUCH AS BEIGE AND WINE ARE TRENDING



COSMETICS



HAIR

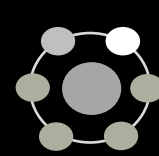


INTERIOR DÉCOR

France is approximately 12 months ahead of the UK and Germany for this trend

Can we activate against this opportunity and get first mover advantage in UK / Germany?

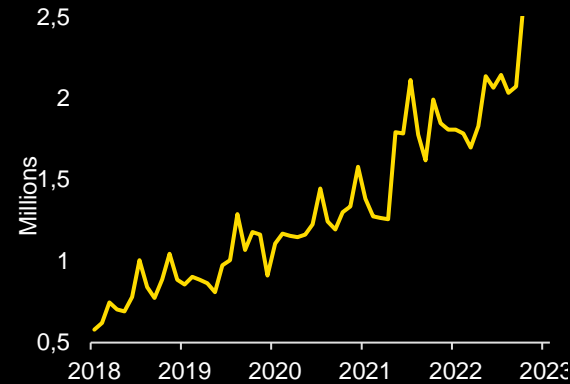




Tap into authentic, honest signals

Search and Social data reflects actual behavior – not just claimed behaviour. It’s a snapshot of what actually matters, not what people project. Search queries frame the consumer need in an honest and transparent way.

INTEREST IN OAT MILK



Interest for oat milks surges but what’s are some concerns driving the interest?

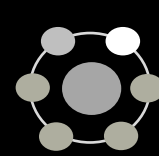
A consumer seeking reassurance on multiple front

RELATED QUERIES

Is oat milk good for you?	What is oat milk made from?	Does oat milk have calcium?
Is oat milk good for weight loss?	Is oat milk good for cholesterol?	Is oat milk healthier than regular milk?

It’s not just about feeding into a trend but also curating the offering, so it aligns with consumer needs

Will specific cues on the label give our product an edge over competition?

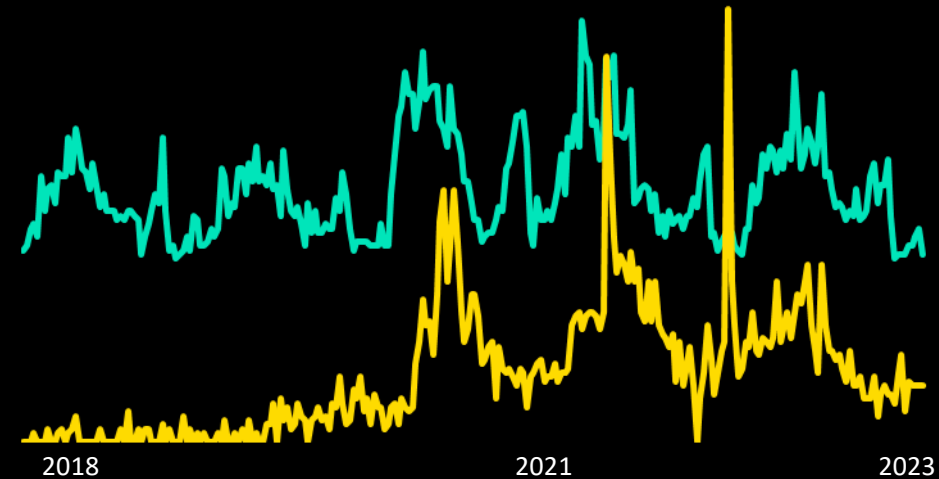


Longitudinal & predictive

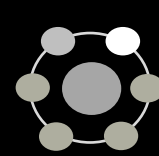
Allows backward & forward views. We can see previous demand spikes, seasonal trends and correlations with adjacencies and anticipate how trends may evolve.

Interest levels based on indexed search

Seltzer vs. Beer

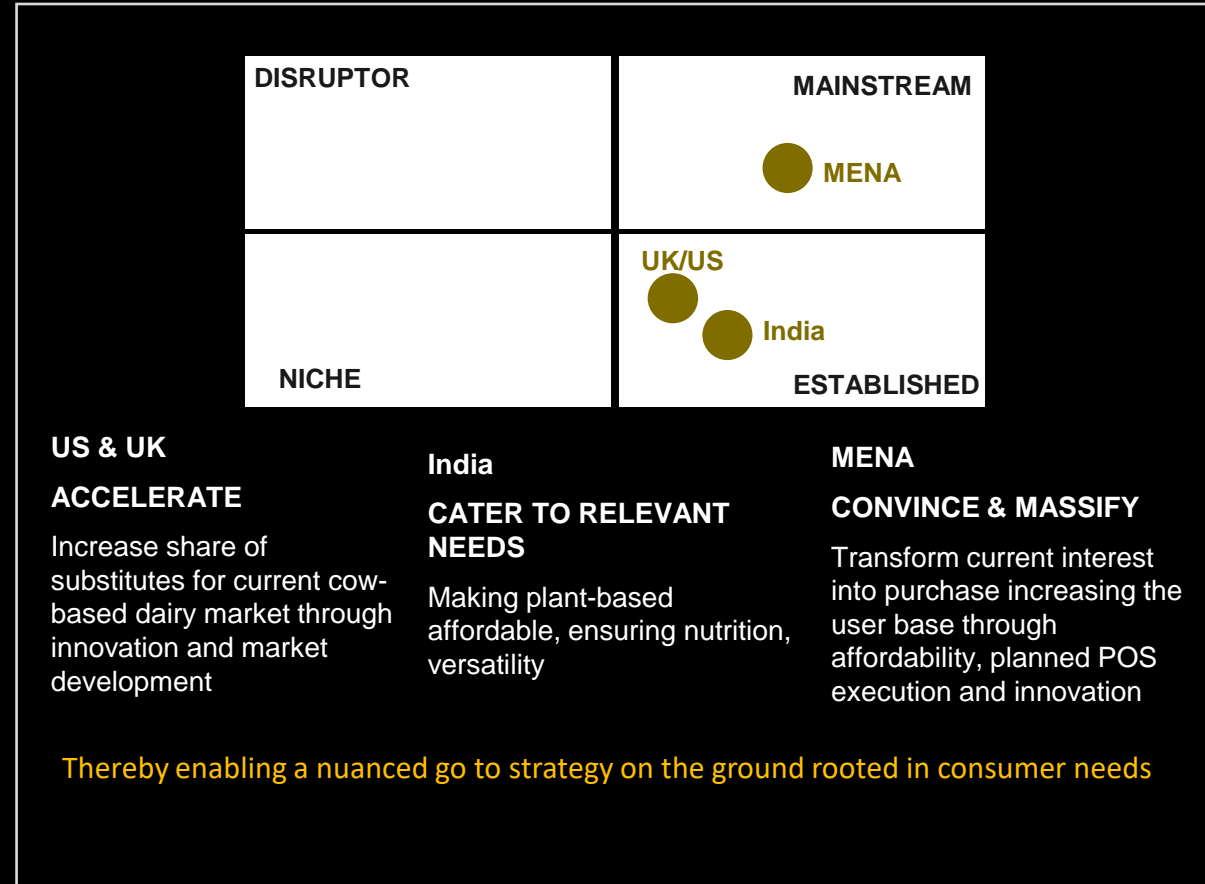


Making a case to a brand within the alcohol to expand into new territories based on potential trends and their relationships with one another



At scale

Globally comparable, given the availability of search data across markets. Enabling us to track trends as they occur mapped to our framework



i-Witness

Identifying frictions in home-lighting products for a global home appliances company

THE ISSUE

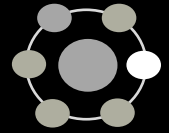
Understanding how to improve the user experience in the installation of home lighting products – from unboxing, to understanding the instructions to actually installing it

THE APPROACH

Lighting products shipped to respondents, who were asked to create self-recorded videos of the entire experience



Outside In
Inside Out



Qualitative
Tension
Hunting

THE INSIGHT AND IMPACT

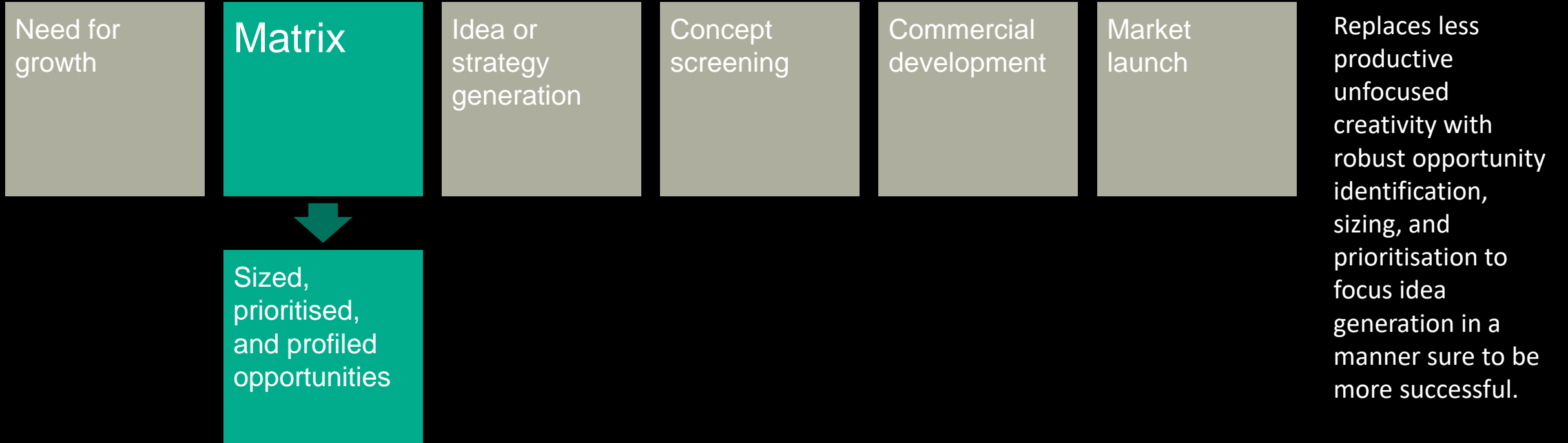
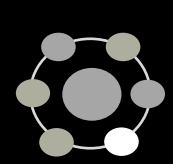
The access to live experiences through video identified several frictions that respondents had not previously articulated in interviews – issues that were not considered by the development team and therefore not asked in previous consumer engagements, such as how the instructions were laid out and in what order the box was unpacked.

Presenting the work through a video narrative brought the challenges alive vividly for the product development team, helping them ‘live the experience’ of unboxing and installing the product.

Finding success with product development

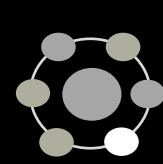
Matrix takes the guesswork out of product-led growth

Outside In
Inside Out



MATRIX - To effectively identify the most promising opportunities for product-led growth, we feel it is critical to...

Outside In
Inside Out



Battle for moments

Consumers do not have “general” needs for products. Instead, choice is driven by the unique moments they experience over time.

We therefore assess needs according to **moments** to help identify more relevant solutions



Uncover and resolve tension

Unless a new offer mitigates a problem, consumers have with existing options, nobody is anxiously awaiting its arrival.

We therefore focus on uncovering product **tensions**, which if resolved, can change consumer behavior.



Expand scope

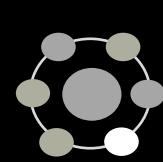
Innovation is often best inspired by looking beyond your current core consumers and most immediate competitors.

We therefore look for opportunities more broadly, with an **expanded scope** to expand potential.

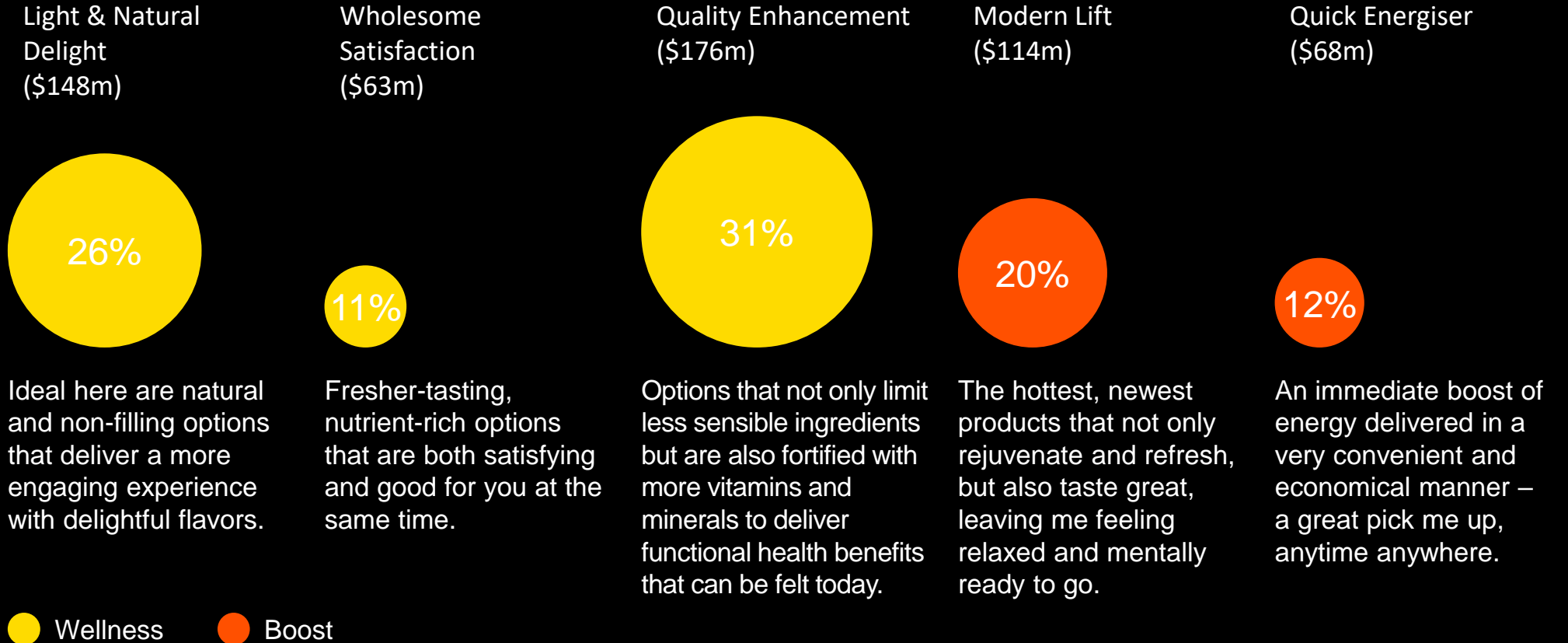


Pinpointing moments-centric requirements for the ideal product

Outside In
Inside Out

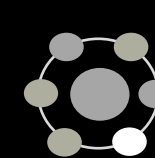


Ideal need segments – benefit bundles valued by many consumers across many moments – encompass the requirements offers must deliver to have the best chance of being selected at the moment of decision.



Outlining specific ideal requirements of products for each moments-centric need and the products consumers believe currently deliver best

Outside In
Inside Out



● Quality Enhancement (\$176m)

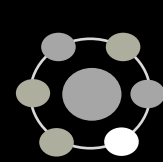
	Ideal requirements
Functional health	Helps improve digestive health Helps build the immune system Leaves me feeling energised all day long Boosts metabolism
Nutritional source	Is the best source of calcium Has been fortified with vitamins/minerals Provides my body with all the nutrients it needs to work best
Fewer negatives	Is low in fat Is low in sugar Is lactose-free Is low in cholesterol

Current market competition

Primary contenders	Client Product Competitor Product A
Secondary contenders	Competitor Product B Competitor Product D Competitor Product F Competitor Product C

Detailed assessment of each ideal need segment reveals tensions

Outside In
Inside Out



Addressing offer tensions is critical to changing the status quo, making tensions the foundations of opportunity

Quality Enhancement (\$176m)

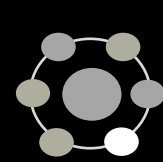
Market performance

Ideal requirements		Primary Client Product	Primary Competitor Product A	Secondary Competitor Product B	Secondary Competitor Product D	Secondary Competitor Product F	Secondary Competitor Product C
Functional health	Helps improve digestive health	43	39	42	36	42	22
	Helps build the immune system	56	66	54	45	52	59
	Leaves me feeling energised all day long	43	58	56	28	40	28
	Boosts metabolism	35	41	37	38	22	32
Nutritional source	Is the best source of calcium	71	73	22	29	38	28
	Has been fortified with vitamins/minerals	68	54	28	63	38	27
	Provides my body with all the nutrients it needs to work best	14	9	7	20	17	18
Fewer negatives	Is low in fat	69	74	69	63	61	61
	Is low in sugar	53	66	63	58	49	34
	Is lactose-free	45	48	18	33	19	27
	Is low in cholesterol	63	18	12	54	21	45

- % agree
- Improvement opportunity (less than 44% agree)
- >5pp advantage vs. key competitors

Bringing each segment to life with a profile helps deepen understanding and enhance targeting

Outside In
Inside Out



Quality Enhancement (\$176m)

Who is most likely to experience this need?



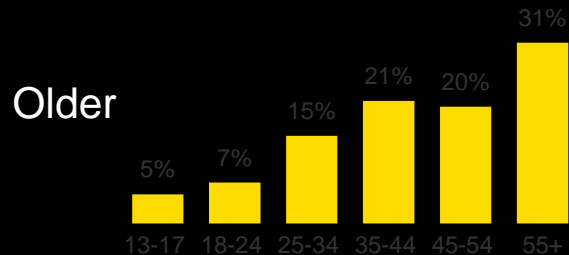
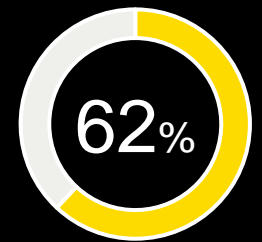
Higher income

\$70,735
Mean annual household income

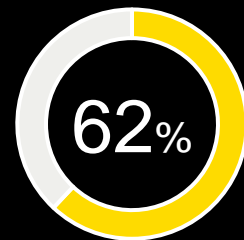
In which moments is this need most likely to occur?



Weekday mornings



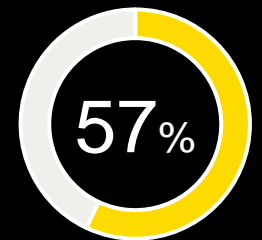
White collar



Consumed with

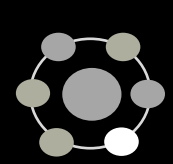
33% Another dairy product
16% Bread
15% Fruit

At home



Without prioritisation, a full product development pipeline is as bad as an empty one

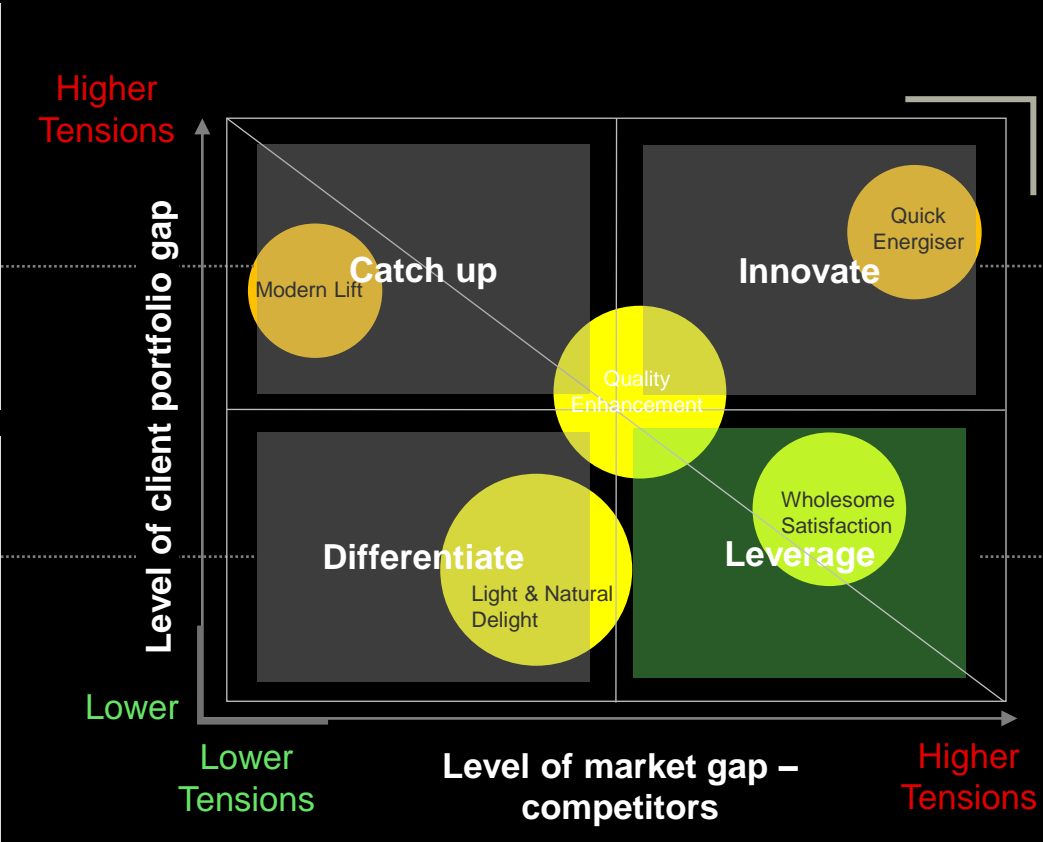
Outside In
Inside Out



Matrix compares portfolio performance on ideal requirements to competitive performance, then factors in opportunity size to identify the type of growth each opportunity represents and guide smart prioritization.

Consumer needs well served by competition, but not client.
Propositions to drive client growth need to leapfrog competitive offers.

Consumer needs well served by client and competition.
To drive client growth, existing products need greater differentiation.

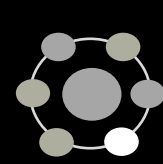


True white space:
Consumer needs not well served by any offers.
Propositions to address these opportunities could require longer development time.

Consumer needs well served by client, not competition.
Propositions that improve client performance will enhance competitive advantage.

Comparing your portfolio strengths, redundancies and gaps to opportunity requirements further informs prioritisation

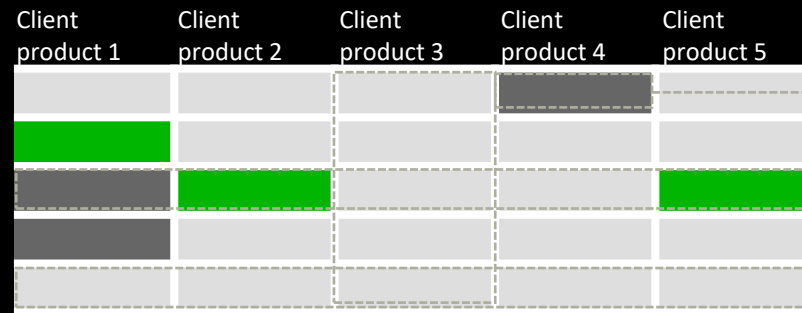
Outside In
Inside Out



Opportunities

- Quality Enhancement
- Wholesome Satisfaction
- Light & Natural Delight
- Modern Lift
- Quick Energiser

Client product portfolio



Optimise: Better align offer delivery with consumers' needs

Redundancy: Three product offers targeting the same need

Gap: No portfolio product is competitive on this need

Upgrade or de-list: Product not competitive on any occasion need

■ Primary contender ■ Secondary contender

Contacts



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Thank You



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