

KANTAR

Retaining relevance for brand growth

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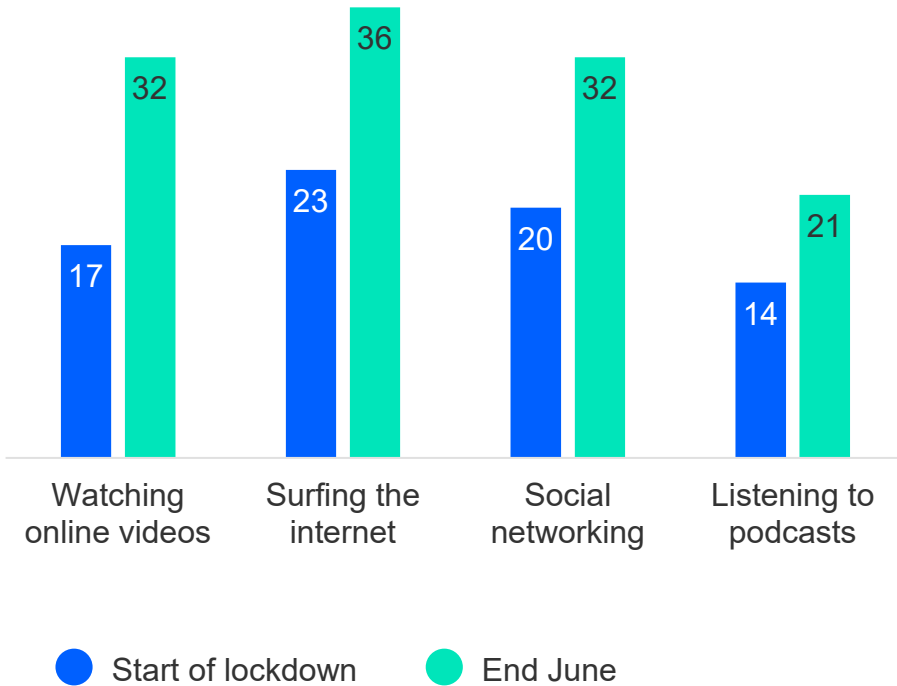
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COVID-19:
the biggest full-stop in the history
of consumer behaviour

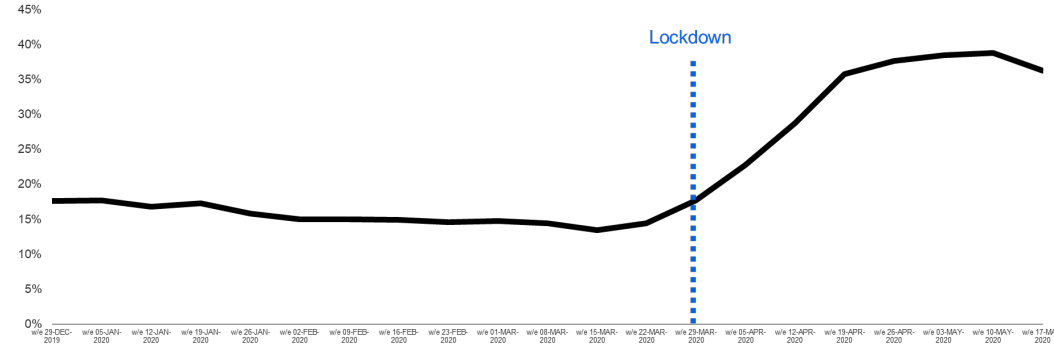
The world has changed...

Dramatic rise in digital behaviours:
Claimed increase in use due to Covid-19



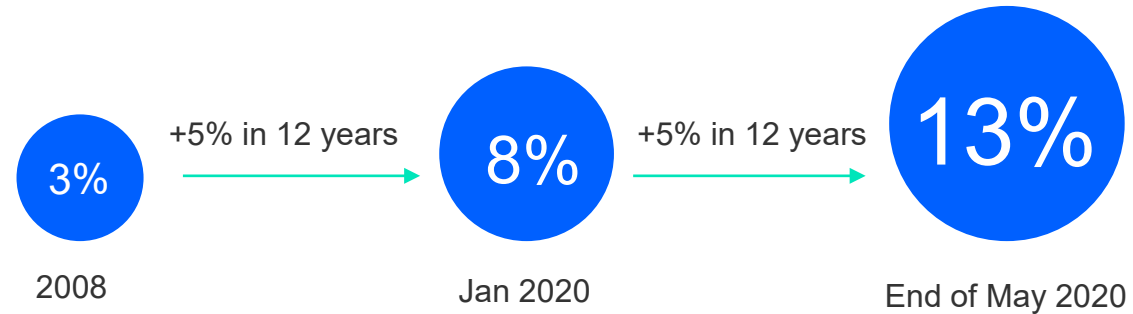
E-commerce share of retail has doubled

Total retail: Rolling 4 weekly average spend share online : £%



A decade's worth of gains in a matter of weeks for take-home grocery

Online share of take home UK grocery: £%



Brands have a

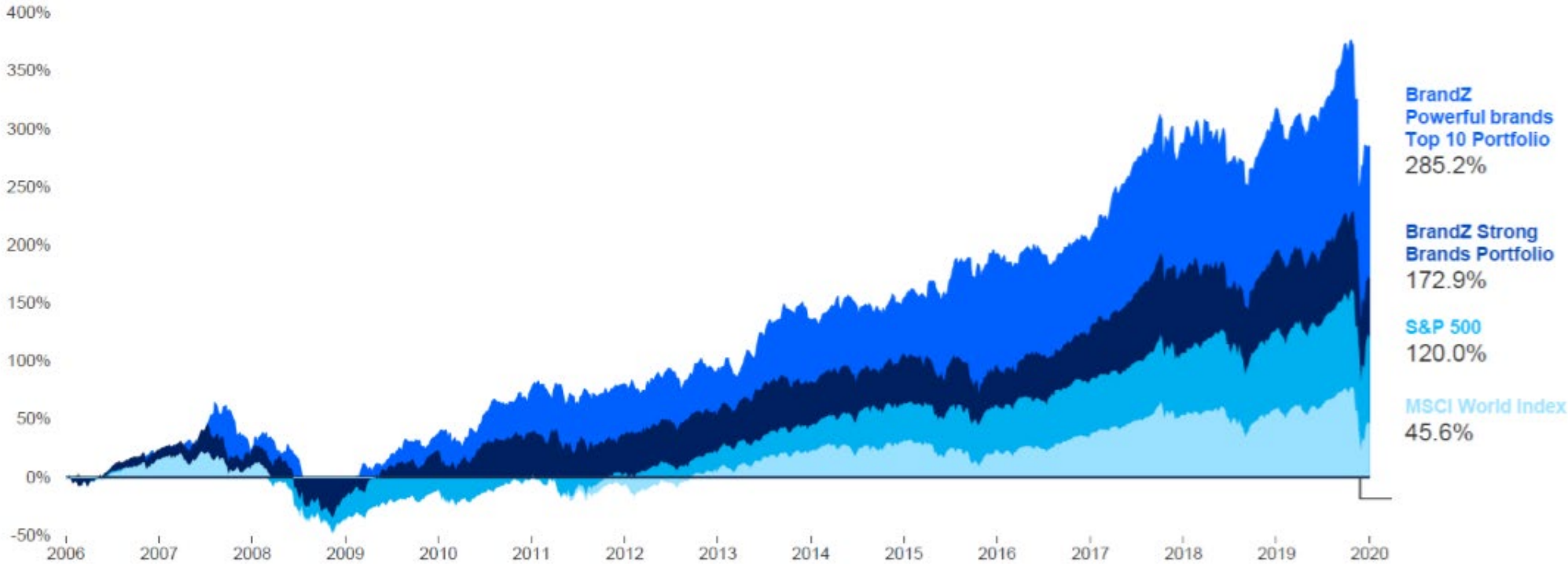
unique opportunity

right now to differentiate themselves
by defining the distinct value they
deliver and bringing their brand
to life in a meaningful way

Strong brands recover faster from a crisis

Recovering **nine times** faster following the financial crisis of 2008

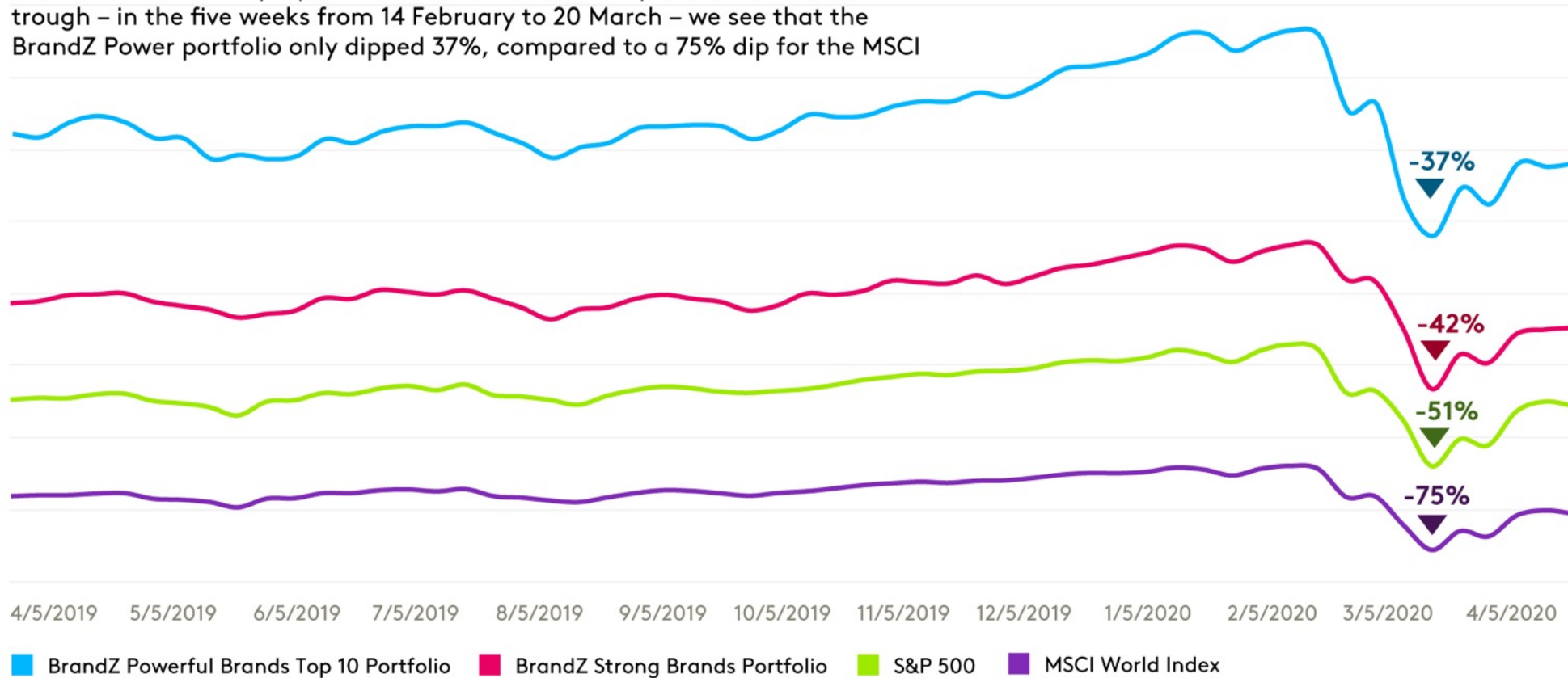
BrandZ Portfolios vs S&P 500, MSCI World (April 2006 – April 2020)



And are better insulated against losses

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

When we look at the proportionate declines from the peak to the bottom of the trough – in the five weeks from 14 February to 20 March – we see that the BrandZ Power portfolio only dipped 37%, compared to a 75% dip for the MSCI



Strong brands

A constantly evolving imprint in the mind of a person – a set of memories and associations



Strong brands are the obvious choice

- Meet category needs and create positive emotions, giving them *meaning*
- Distinctive and dynamic, making them feel *different*
- Come to mind quickly and easily when triggered by a need, making them *salient*

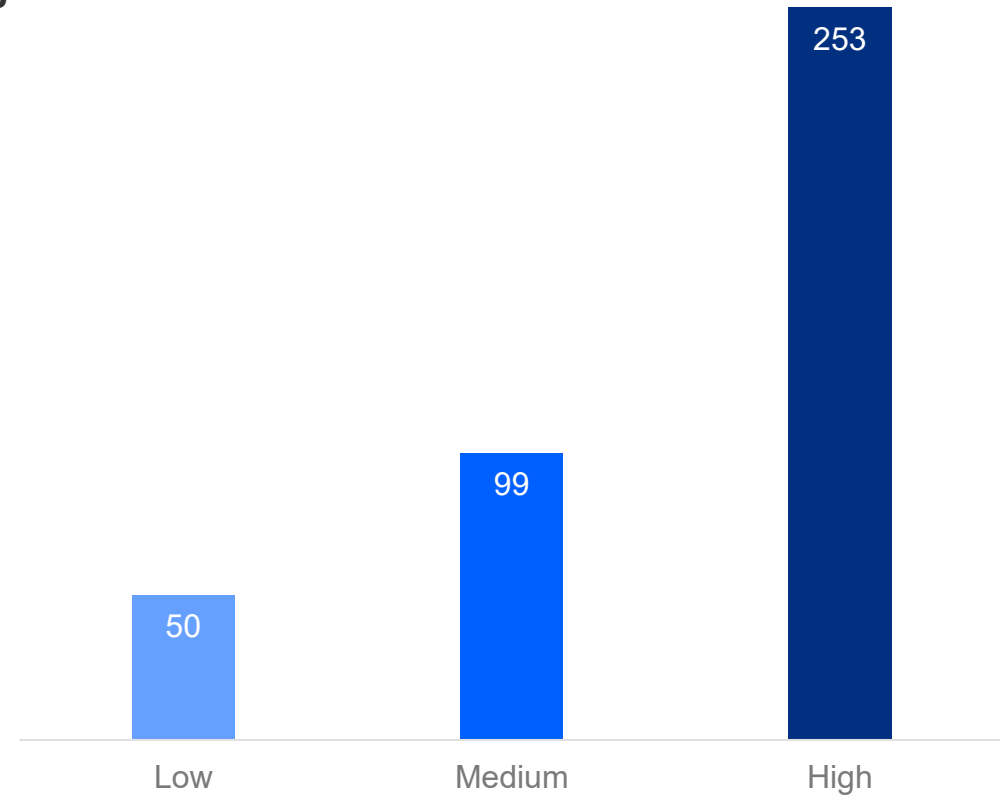




Meaningful difference is key to driving growth

BrandZ Top 100 most valuable brands:
12 year brand value growth

Meaningful difference



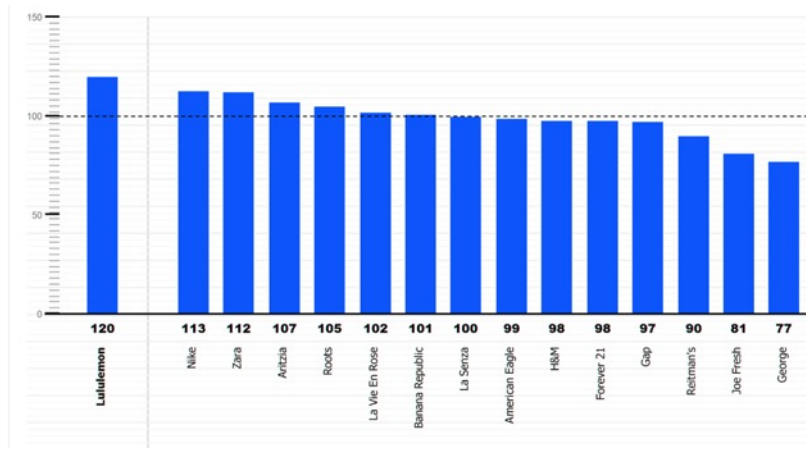
Lululemon's strong meaningful difference is protection for the short and long term

“Everyone should know that we are managing all our decisions through the lens that we won't take anything that puts our price positioning, the power of our price, and our brand at risk – nor do we see the need to.”



Calvin McDonald
Lululemon CEO, April 2020

Lululemon's strong Difference ensures it justifies a high price premium



Meaningful Difference

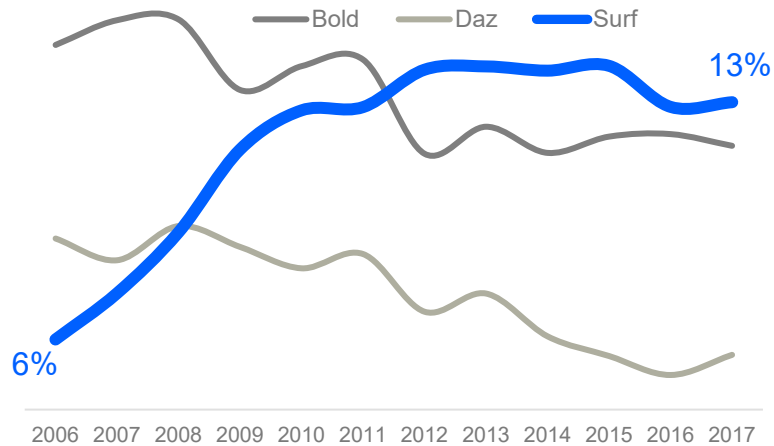
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Brands which continue to drive brand strength through recession can reap rewards

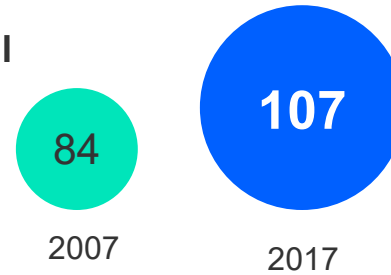
Surf's 'Gorgeous laundry for less' campaign strengthened both prior to and during the recession of 2008, building emotional affinity and meaning



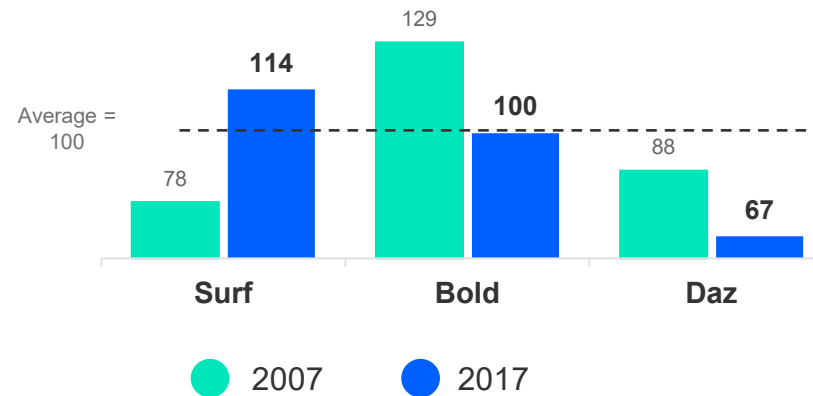
UK Laundry Detergents: £%



Meaningful



Brand Power Index



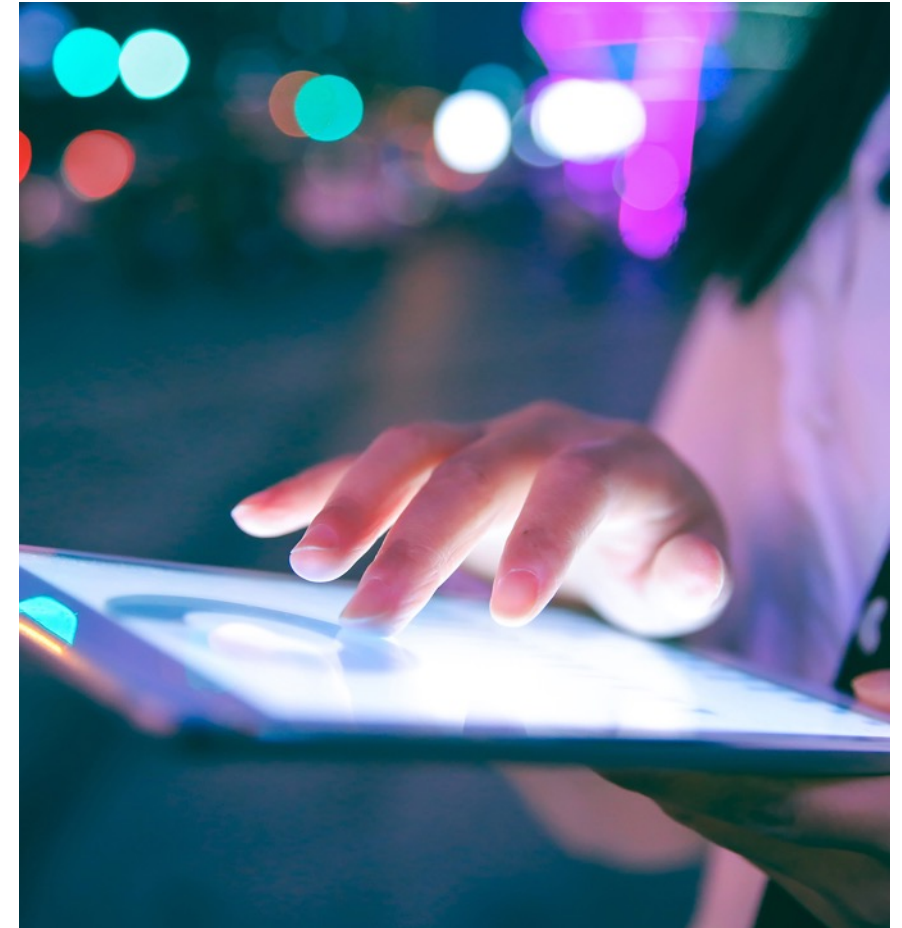
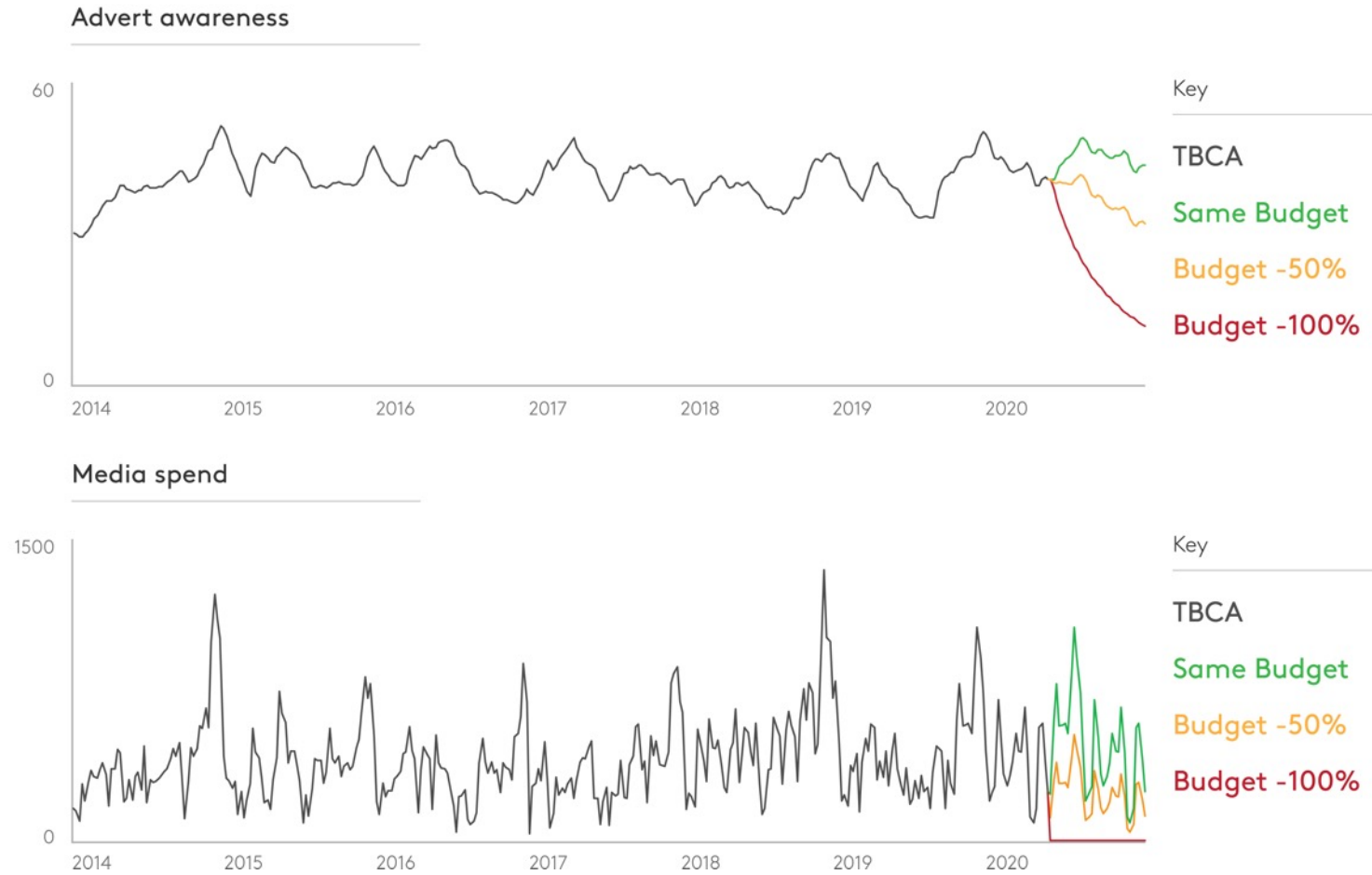
'Surf detergent is the first laundry product to utilise the proposition of essential oils which will further strengthen Surf fragrance platform in the laundry.' category.
Talking Retail 3rd July 2007



'Surf, the fastest growing brand in the main wash sector from Unilever UK, is introducing two new variants to the category – Surf Sunshine Lemons & Bergamot and Surf Tropical Flowers & Ylang Ylang.'
Talking Retail 22nd July 2008

Brand building is an investment, not a cost

Simulation for a real beer brand to March 2021



Protecting longer-term brand-building and activating immediate sales right now is key...

but they work in different ways and you need to do both!



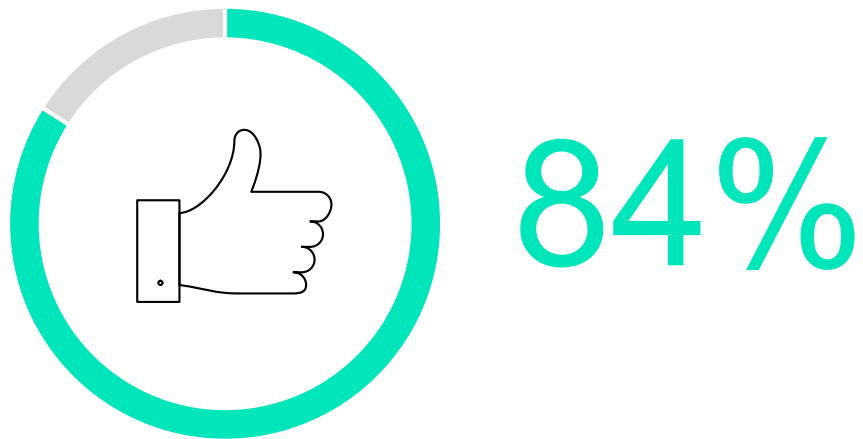
“If you want long-term growth, what you've got to do is change people's minds in some way.

You've got to build up **memory structures** that will bias their **behaviour** into the future.”

Les Binet

People are happy to hear from us!

% of consumers who described Covid-related adverts positively



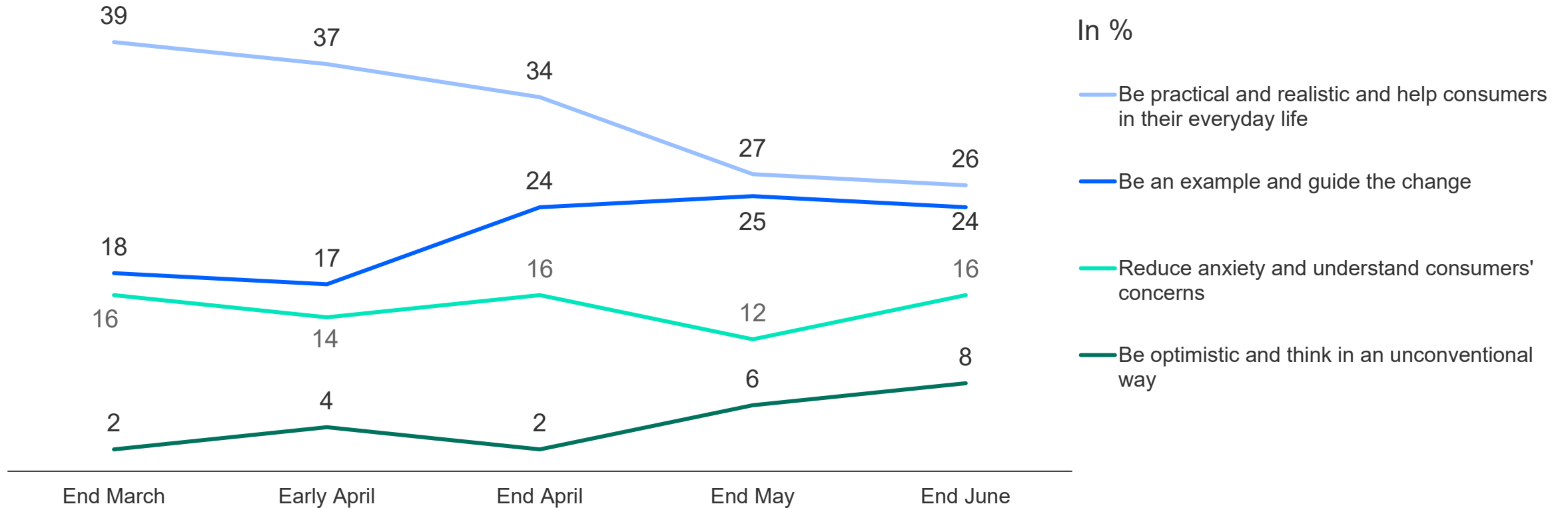
Top 3 positive words used to describe Covid-related advertising

Informative

Helpful

Reassuring

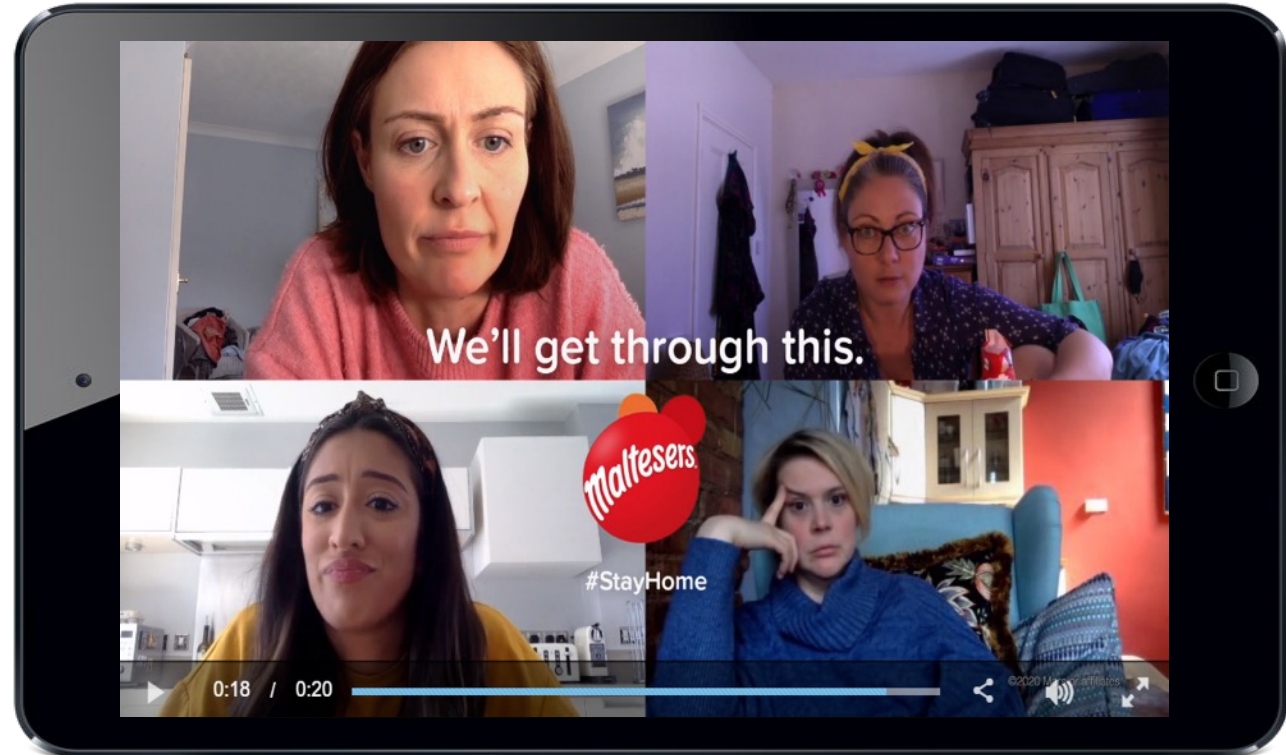
Consumers have high expectations for brands to guide the way and increasingly provide optimism for the future.



The sweet spot of staying on brand while addressing these are different times

Maltesers' "isolation life" campaign

Maltesers' latest campaign achieved the perfect balance between acknowledging the unique climate we are facing, and being on brand.



Understand People Inspire Growth

About Kantar

Media Division in Kantar is a global leader in media intelligence, providing clients with the data they need to make informed decisions on all aspects of media measurement, monitoring and selection. Kantar provides the most comprehensive and accurate intelligence on media consumption, performance and value. For further information, please visit us at www.kantar.com