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# COMPANY SPEAKERS

* **Will Galgey** *Global Managing Director, Solutions & Platforms*
* **Peter Russell** *Kantar Group Treasurer*

# PRESENTATION

**Peter Russell - *Kantar Group Treasurer***

Welcome everybody to this Kantar Marketplace demo. I hope that this will shed some light for you all as to what we offer to our clients. It's the first of these demos for our debt investors and looking forward to doing this for you. So, with that, I will now hand over to Will Galgey, our Global Managing Director for Solutions and Platforms. Thank you, Will.

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**Will Galgey - *Global Managing Director, Solutions & Platforms***

That's great. Thank you, Peter. And hello everybody.

Thank you for joining the session. Hopefully this will be a little bit different to some of the sessions that you've had from us in the past. As Peter said, the purpose is really to give you an overview and a live demonstration of our Kantar Marketplace platform. So, I'm going to take about 20 minutes or so to run through a demo, then very happy to take any questions that you may have at the end.

I guess the obvious question to start with is, what is Kantar Marketplace? Marketplace is an automated AI enabled market research platform that is designed for insights professionals, marketeers, agencies who want to test, learn and move faster.

Fundamental to the value proposition is agility. The core benefit for our clients is our ability to deliver research results to clients in hours or even minutes compared to the days and weeks that it would've taken us prior to the development of Kantar Marketplace.

We launched the Kantar marketplace in March of 2019, and it's grown rapidly ever since. We grew to in 2024, annual revenue of $162 million, which represented year-on-year growth of 21%. 2025 is proving to be another year of strong double-digit growth. And importantly, the contribution margin is also very strong. Approximately double that of our wider solutions portfolio. In 2024, Kantar Marketplace represented 9% of our insights division revenue, about 18% of our insights division operating profit.

If I just scroll down, you can get a sense here of some of the clients that are using the platform.

In 2024, we actually conducted almost 12,000 research studies through the platform for over 1,100 different client organizations across a real cross section of industries. And we also conducted studies in 2024 in 69 different countries, actually commissioned from 53 different countries. We are selling the platform and the products on the platform really all over the world and delivering value to our clients in many industries, many sectors and many countries.

What I'm going to do now is, I'm going to log into the platform and just give you an overview of how the platform works and some of the key products within the platform as well. I should say here that I've logged into the standard Kantar Marketplace platform. But actually for 11 of our larger clients, we have configured enterprise versions of the platform which are really much more customized to their particular needs. They will have their logos, their colour schemes, the language and the information that they prefer to use to describe the different business questions that we're able to answer or the different solutions that we have.

For some of those clients, we've even developed solutions that are specific to that client organization that only they would see when they log into their version of the platform.

If I click onto the solutions page, within the Kantar Marketplace platform, we have a portfolio of 13 different products, each designed to address a specific need or a use case that a client might have. For example, we've got products on the platform that are designed to help clients to develop, test, and optimize their advertising. And I'll show you an example of that in a moment.

We've got products designed to help clients to develop and test new innovation concepts. When for example, they're developing a new product or a new service and they want to evaluate the likely take up of that product or service or the attraction that it might get in the market.

Then we have products that are designed to help clients to really measure and improve the overall strength of their brands. Most of these products are based on consumer surveys. We send questionnaires through the automated platform to consumers on our proprietary profiles, research panels around the world.

But we do also have two AI-driven products on the platform. LINK AI, which is a product for predicting the likely success of an ad. And Concept Evaluate AI, which is a product for predicting the likely success of a new innovation concept. Both of those products are doing really well, growing very fast. We're also developing a number of other AI products for the platform as well.

All of those AI products are being built by our in-house AI data scientists and technology teams based on our own proprietary models and of course, leveraging our proprietary databases as well. The real benefit of the AI products is that we really can deliver results to clients within minutes, although we're currently working even on bringing that down to seconds.

Now, if the client isn't entirely sure what solution might be right for them, we have an AI-enabled solution finder here on the platform. If I type in, for example, I want to test an ad to see if it will be, apologies, my slow typing, be effective in France and the UK. This should then generate an answer as it has there.

You can see that it's recommending a couple of different, well, three even different solutions that we have on the platform that would help a client to test and develop their ad. LINK+, which is the really in many respects, our flagship product on the platform, which I will give you a demo of shortly. LINK AI, the product I just mentioned, but also Concept Evaluate AI as well. Then you can dig further if you want.

You could prompt further around what might the benefits be. Why don't I do that, see what we get. It would generate an answer there, there you go.

It's going to outline the key benefits of LINK+ being flexibility and speed, in-depth creative insights, robust analytics backed up by a strong database and alignment with our overall Kantar blueprint for brand growth, which is part of our core IP in a framework for helping clients to think about how to redevelop their brands. You can keep probing.

As you can see, but in this case, I might switch to say, what if I want to understand the strength of my brand? And again, hopefully this will recommend some other solutions. In this case, it's recommended three different solutions on the platform, all of which would have different advantages in terms of helping a client to really evaluate the equity, the strength of their brand.

A little later, I'll give you a bit of a demo of one of those products, brand Snapshot, the second on the list. You get a sense there of the different products that we have and the capabilities that are there.

But let's assume that a client goes on to commission and launch a study. Let's take you through now the kind of outputs that they get, the kind of insight that they would get.

I'm going to start as I said with LINK+.

LINK+ is a survey-based solution. If I just go to the right. Library. As I mentioned earlier, it's really designed to help our clients to evaluate and optimize their ads as they are in the process of developing them. Before a client launches an ad into the market, they will want to test it at different stages of development depending on the type of ad, depending on the client. But they might test it at the very early stage where they only have an outline script. They might then have a storyboard, they might have what we call, an animatic, which is a rough animation of how the ad would look. Then they'll have rough edits, and then ultimately, they'll have a final edit.

Some clients will test the ad using this product at all of those different stages. Other clients will test it only at certain points on the development journey. We're also able to test ads across multiple different formats. In this example, I'm actually showing you some TV ads, but we can also test static ads. Print and out of home, and also digital ads across all different platforms and formats.

Whether it's YouTube Shorts or Instagram Reels. Really, we cater to pretty much any ad format that a client may have and may be looking to evaluate and optimize.

Now, what you're looking at here is actually some test that we commissioned and funded ourselves looking at last year's Christmas ads in the UK. But if you were a client and you came into the platform, what you would see is all of the ads that we have actually developed for and tested for you. For some of our clients, that would run into the thousands of ads that we will have tested for them over the years for their different brands across different markets that they might be running those ads in. This in itself becomes an incredibly valuable and useful repository of all of those ads that that client has developed. Yu can filter this library view in a multitude of different ways. By the ad format, by the date that it was tested, obviously by the brand, but also the market.

I was just going to show you as well, one of the things that you can do. You can filter the database essentially by, if for example, you're looking at wanting to understand only those ads that have performed particularly well on one of these dimensions. Branding for example, I could say just show me any ad that's achieved a branding score above 65 for example, and it will filter the library based on that. In this case, there are actually 50 ads here that meet that criteria. You can use this for lots of different forms of meta-analysis really to try and understand which of your ads are performing better on different dimensions and why, and what you might learn from that as you move into developing your next campaign.

If I take that filter off and if I go to... I'm just going to select Coca-Cola. And I'm going to zero in on Coca-Cola's UK Christmas ad from last year and just give you a sense of the kind of insight that we deliver for a client. This is the overview that they would get of how that ad has performed. And you can see here there's a little thumbnail of the ad. If they want to remind themselves of what they tested...

**Advertisement:**

Anyone can be Santa.

Why can't a lady like me?

I admit I'm underfed but with a pillow from the bed, I could be Santa Claus.

I won't play the full ad, but you get the idea, it's there as a reminder, which is pretty helpful. Then you get to the right-hand side here, you can see, you get a summary of how that ad has performed based on our test. Importantly to say, this is entirely GenAI created, this summary. This is a proprietary model that we've developed and trained on our IP and on our database. That is giving the client an overview of the performance of the likely performance of that ad. You can also select an overview, you can get a one-page summary if you like, of the performance of the ad with some of the key dimensions that we look at, which I'll come back to in a second, and some of the key scores.

I should say as well at this point, you can export this into an automated PowerPoint deck, that if you want to share it with your colleagues via PowerPoint, that's very easy to do, as well as some of the verbatim responses in Excel as well. Then there's various different ways that we analyze the ads. The summary that we give is, we essentially help clients to understand the extent to which on the X-axis, an ad is likely to drive short-term sales performance and on the Y-axis, the extent to which that ad will help to build their brand equity and the strength of their brand over time.

You can see in this particular example, as you might expect from Coke perhaps, this is a very strong ad. It's in that top right-hand quadrant and really performing very well on those two dimensions. Again, right through the dashboard, there are these AI headlines to give you an overview. On the left-hand side, you can actually see there's a menu of all of the different diagnostics that we have for that ad. If you want to dig into any particular aspects of this, you can. It's all there and it gives you really as much detail as you want almost or could want in terms of really understanding the performance of this ad on a range of different dimensions.

You can then also compare it. What I'm going to do now, is actually compare it to their ad from 2023, which is perhaps one you'll be more familiar with, The Holidays Are Coming campaign. If I select that and view the results, I then get a side-by-side comparison of those two ads. You can see that while the 2024 ad was certainly a very strong ad, actually the '23 ad was even stronger. And again, you could drill into this to really understand how those two ads are performing on a range of different dimensions. As they develop their '25 ad, which they've probably already done at this point, they'd be able to learn from that and think about what it is that they really should optimize based on how those ads performed.

I can tell you here that perhaps obviously, The Holidays Are Coming ad performed particularly well in terms of the sense of nostalgia that it triggered, which is very powerful, has a very powerful emotional resonance. The World Needs More Santas ad from 2024 did not have that same sense of nostalgia and didn't manage to connect quite so strongly with consumers. If I go back to the library view, I also thought I would show you another quite nice feature that we have in the platform. I'm going to just pick this first one to illustrate this.

This is Waitrose's Christmas ad from 2024. And again, I'll just give you a little reminder in case you.

**Advertisement:**

Where were we?

The pudding is gone.

Tell me what saw.

First of all, the detective has to establish motive. Could it have been greed, desire, or feeling undervalued?

All three. Now, you have to establish-

Thank you. I'm solving this, not you.

You get a little bit of a reminder of that ad. One of the nice features that we've got is a facial coding feature. The way that this works is that as the consumer, the respondent is viewing the ad, we're also able to track their facial expressions through their webcam. We're able to diagnose the intuitive emotional response that they are having to the ad. If for example, I can select the extent to which people smile as they watch this ad. You can see the trace line, this is a second-by-second trace of where people are smiling as they watch this ad.

**Advertisement:**

Where were we? The pudding is gone.

Tell me what you saw.

First of all, the detective has to establish motive. Could it have been greed, desire, or feeling undervalued?

All three. Now, you have to establish-

Thank you. I'm solving this, not you. How could someone pull off-

You can sort of see there, at that moment, it triggers a stronger, more positive response. This is helpful for clients when they are firstly, trying to understand the emotional triggers of different elements of the ad, but also if they are producing a cut down version of the ad, so a shorter edit. In this case, this is a 30-second ad, or it might even have been a 60 actually. Yeah, it's a 60-second ad. If the client is producing a 30-second cut down of that or even a 15-second cut down of that, they can use this to understand, what is it that is most critical that they retain within those shorter edits in order to get the most impact and the most engagement from their consumers?

Iif I go back now to, I wanted to show you one of the other products on the platform. I'm going to switch to a product that we call BrandSnapshot. BrandSnapshot is a product designed to really give clients, as it says, a snapshot of the overall strength or the health of their brand within a particular category context. Now, this is actually a freely available product on the platform that we use as a lead generation tool. Actually, any of our clients or indeed any of you could register and access this product and all of the data within it. The idea is that it gives clients a level of insight to really get them engaged with a view to us then upgrading them to one of our paid four products.

It's actually powered by our proprietary BrandZ database, which you may have heard of, which is an annual review and ranking that we run of different brands all across the world. Within the database, we've covered almost or over in fact, I think 21,000 brands now in over 50 countries. But in this particular case, I've selected Emirates Airline in the UK. You can see here that we have a number of different tiles that provide different ways of really trying to understand the strength of the Emirates brand. I think it's important to say that we're looking here at a general population view. This is how the average UK population appraises the Emirates brand.

Obviously if you were looking at a more defined audience such as say business travelers, you might get a very different perspective. But each of these tiles, you can drill into and get more detail, but also some AI generated recommendations and insights as well. I’ll drill into the brand equity tile, first of all. Within this, this is really Kantar's core intellectual IP framework for evaluating brand strength and brand health. That is built around three key dimensions, which are meaningful, which is the extent to which a brand is meeting both the emotional needs but also the functional needs of consumers in this category. Difference, which is the extent to which the brand is perceived to offer something that others don't and is leading the category in some way.

Then salience, which is what we describe as the mental availability of the brand. How easily it comes to mind when a consumer is making a purchase within a given category. These scores are indexed to 100, 100 being the category average in the UK. You can see here that Emirates is broadly aligned to the category average from meaningful, slightly below on salience, but actually performing very strongly on difference. Significantly above the category average. I click on that, I can see how actually it compares on difference, specifically relative to other airline brands in the UK market.

we also characterize each brand. In this case, Emirates is characterized as an aspirational brand. This is again, AI generated with a summary of why and a overall assessment of the brand. You can also look at this in a lot of different ways. If you want, this is a different way of representing the same data essentially. But on the Y-axis is the difference score. On the x-axis is meaningful. Then the size of the bubble represents the salience of the brand. British Airways in this case, you can see is right out there, very much the most salient and indeed perceived to be the most meaningful brand in the market. But Emirates are doing very well, as I said earlier, in terms of perceived difference.

Then one of the other dimensions, just to give you a bit of a perspective on, we also look at the pricing power of the brands and we assess the pricing power of the brands in the category. On this chart, on the X-axis, you've got the perception of, this is the right way around, the perception of price. How expensive or not the brand is perceived to be in the category context. On the Y-axis, we've got the perception of value. You can see top right that Emirates is probably exactly where it would want to be, a justified premium. Perceived to be expensive, but also perceived to be delivering higher than average, higher than expected value for that price in the category. Given the margins in this category, that's certainly a place where they probably would want be.

The flip side is, bottom left, we've got the likes of Aer Lingus, Ryanair and Wizz Air that we have characterized here as being quite commoditized because they're perceived to be cheap, but also low value. Interesting to see, easyJet makes it up into the quadrant or the segment above in terms of actually perceived to be better value, albeit still at a low price than Ryanair, for example. And again, on the right hand side here, you've got some headline insights, AI generated to give you a bit of a sense of what you might want to focus on optimizing for this particular brand. I won't go into more detail on this, but you can see there are other elements that a client might wish to look at.

But again, as I said at the beginning, the purpose of this particular product is really lead generation to give clients some insight into how we think about brands, how we measure brands, and to hopefully trigger a conversation about what more we could do for them or how we could get to a deeper level of insight for them.

With that, I will stop there and I will hand back to our moderator because we're happy to take any questions on any aspect of what you have seen.

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**Operator**

Thank you. We'll now start the Q&A. If you would like to ask a question in the Q&A session, please follow the link in the panel below to register. Once connected, we ask that you please use the raise-hand function at the bottom of your Zoom screen. If you've dialed in, please select star nine to raise your hand and star six to unmute. We'll pause a moment for question to form in a queue.

As a reminder, if you would like to ask a question, please follow the link in the panel below to register. Then once connected, please use the raise-hand function at the bottom of your Zoom screen to raise your hand. It looks like we have no questions at this time, I'll hand back to Peter Russell for closing remarks.

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**Peter Russell – *Kantar Group Treasurer***

Thank you, Sophie. Well, thank you, Will. That was a really insightful guide to some of our products. I certainly found it fascinating. I know it's quite difficult to visualize and understand what Kantar does. You can't always touch or feel the product, but that I thought was really helpful. I hope all of you guys thought that as well.

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**Operator**

Thank you for joining today's call. We're no longer live. Have a nice day.

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