WINNING OMNICHANNEL

FINDING GROWTH IN REINVENTED RETAIL

ISSUE 3 | JULY 2019

GROWTH FORECAST | CHANNEL STRATEGY | FUTURE BIG BETS

KANTAR

CONTENTS

THE GROWTH OF HYBRID RETAIL

The 'zero growth' challenge continues to grip the global FMCG industry. It will surprise few to hear that global FMCG sales grew just 2.1% between 2017 and 2018, against a backdrop of declining share of hyper- and supermarket formats.

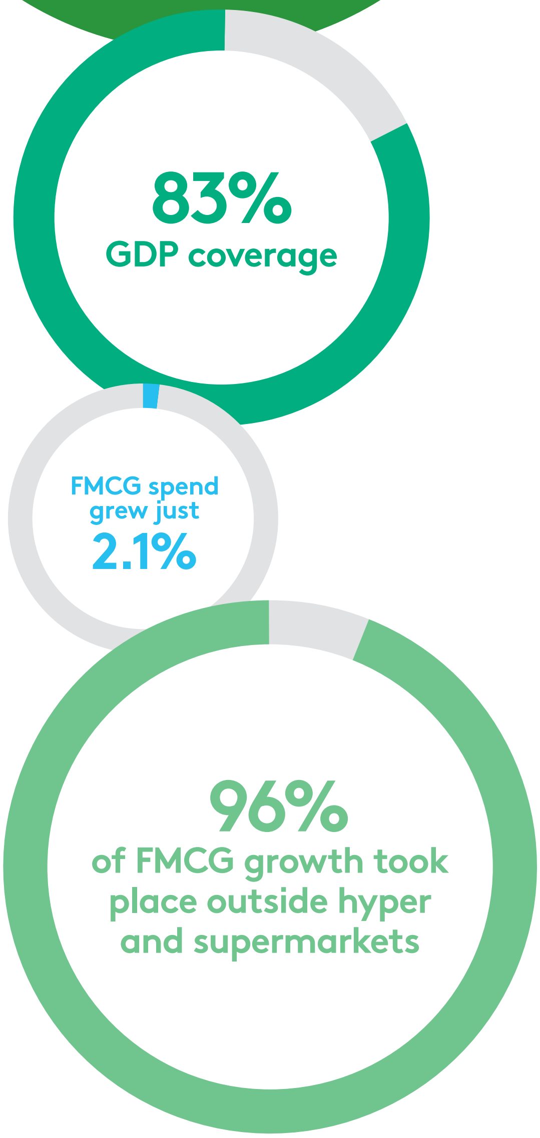
But there are retail trends and innovations that have dominated the headlines. The biggest retailers are forming alliances to put pressure on suppliers and drive down costs; e-commerce continues its onwards march; discounters are appearing almost everywhere; and hybrid or 'new' retail formats are becoming more commonplace around the globe.

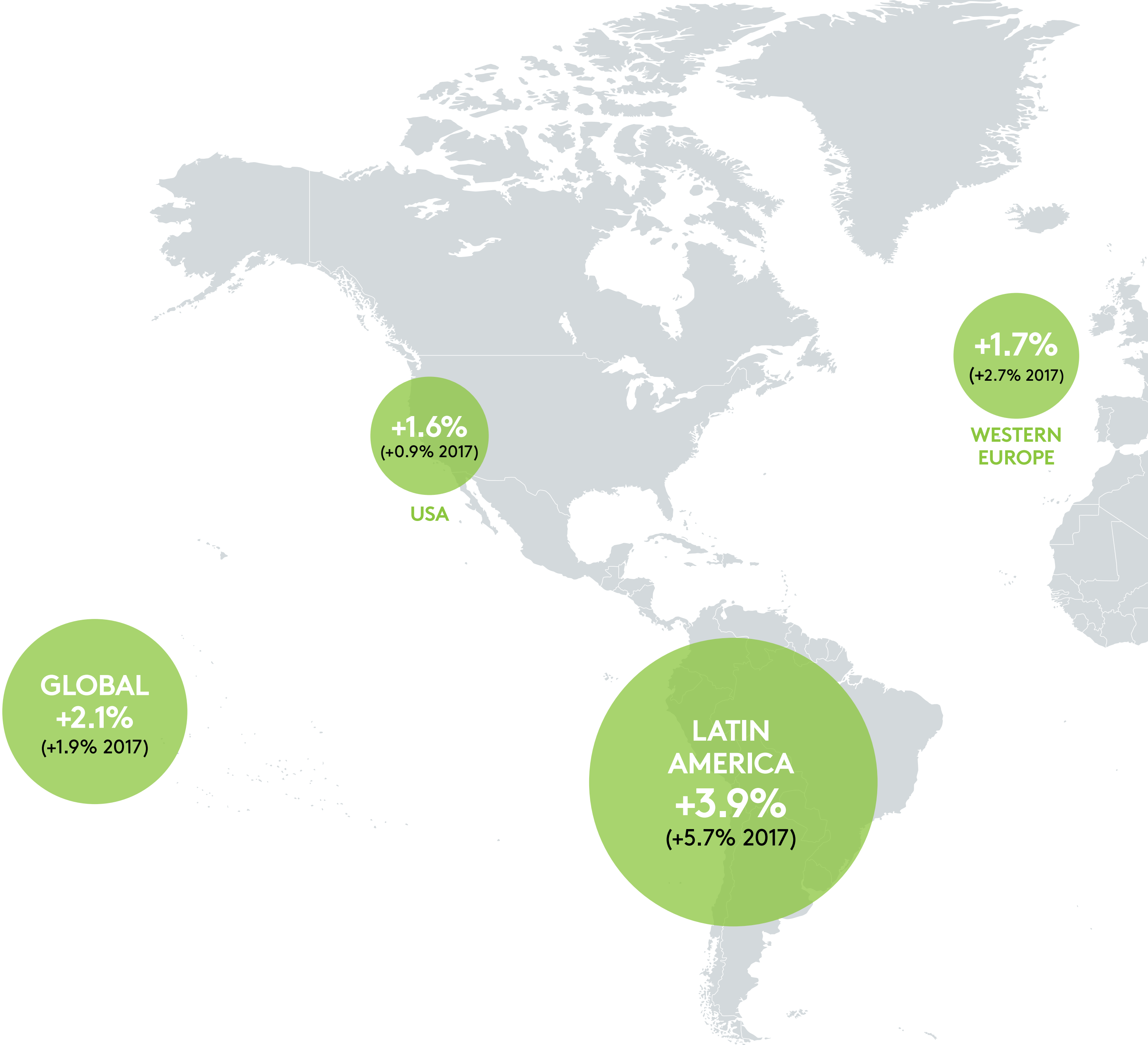
These trends point towards one outcome: growth is still possible if you focus on the right channels. As we will come on to discuss, 96% of FMCG growth took place outside hyper- and supermarkets, and e-commerce is growing 10 times faster than all other channels combined.

Therefore, those that can understand the full picture of the trends at play and adapt appropriately will thrive. We will provide a crisp and clear overview of the balance of channels across the world, and share our predictions for future growth opportunities.

This year we have better coverage than ever before, integrating 13 new countries into our analysis. India features for the first time and, thanks to our partnership with GfK, Italy, Germany, Austria, Denmark, Netherlands, Russia, Poland, Croatia, Bulgaria, Hungary, Czech Republic and Slovakia are also now included.

This means we now measure the real shopping behaviour and retail choices of more than two-thirds of the world's population—47 countries, representing 83% of GDP. Through this, we can help brands and retailers win in the hybrid, omnichannel world.





THE GLOBAL PICTURE

For the fifth year in a row – stretching back to 2014 – we have seen the growth of global domestic product (GDP) outstrip that of the global FMCG industry.

While GDP growth has been stable in recent years, growing on average +3.5% per year, FMCG growth has been slowing—from +6% to +2.1% since 2012.

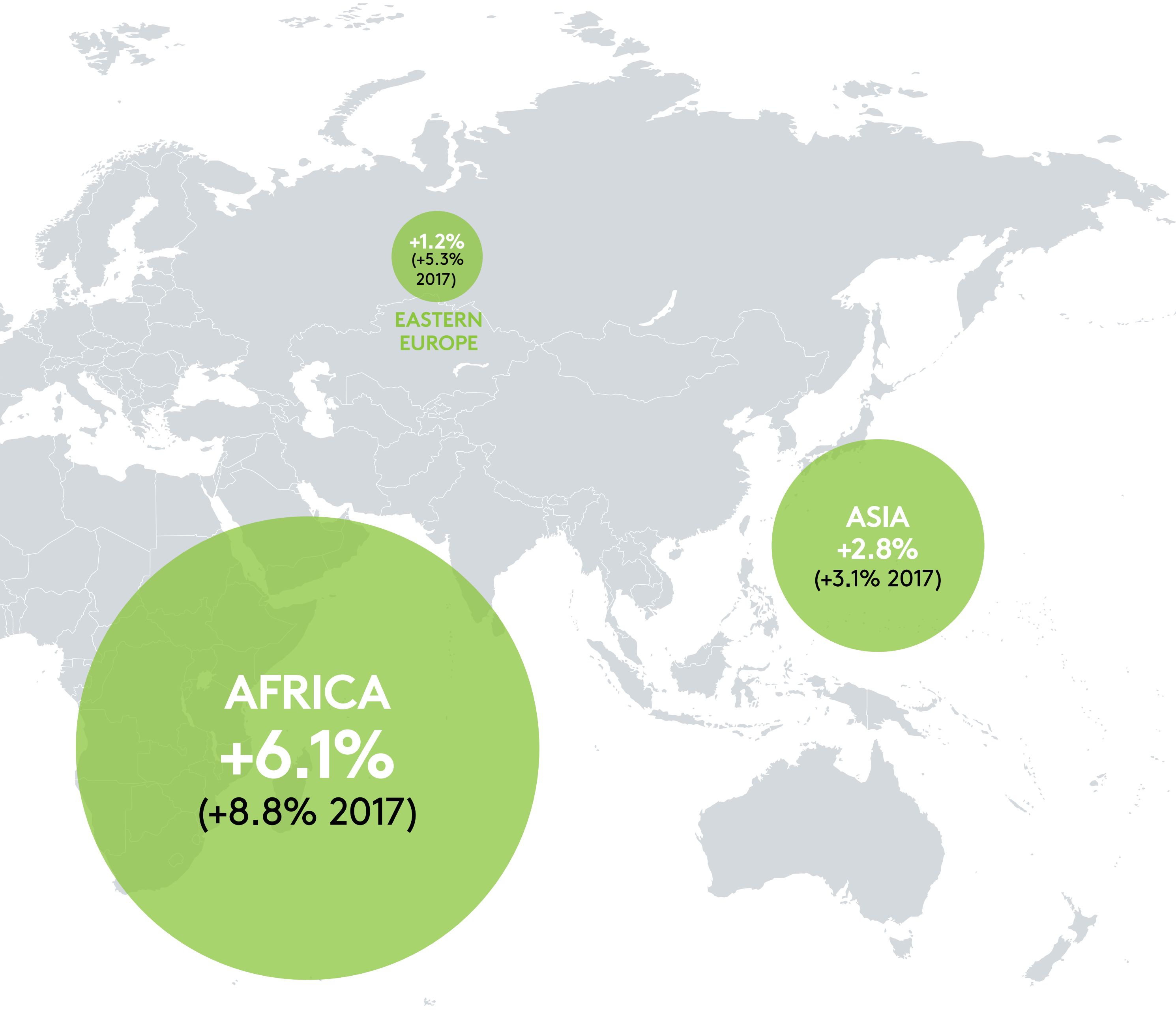
The map above may suggest growth in every region, but the data alone does not always tell the whole story.

In fact, 2018 saw a continued slowdown in every market we've analysed—other than China Mainland and the US.

Positive performance has been driven through e-commerce and discounters in the US, while China Mainland has also seen consistent growth in e-commerce. Both are channels we'll look at in more detail later in this publication.

In almost all regions, inflation is having an impact. We spoke about 'stagflation' in last year's publication – inflation and stagnant demand for FMCG goods – and that's a trend that continued throughout 2018.

Africa and the Middle East and LATAM display the highest value growth, but all is eaten by inflation.



Source: Kantar, GfK, Intage

TURBULENT TIMES
The global FMCG picture is being shaped by three distinct trends:

THE CONTINUOUS DECLINE OF HYPER- AND SUPERMARKETS
In almost every country we've analysed, hypermarket share is experiencing consistent decline—with shoppers switching such trips for discounters, cash and carry, convenience and e-commerce.

CANNIBALISATION
With FMCG growth remaining flat, any channel growth is at the expense of another. Shoppers are not making additional trips and are therefore not increasing opportunities for retailers; they're simply swapping channels.

ALLIANCES
Retailers are teaming up. Cross-border buying alliances – like the UK's Tesco with French powerhouse Carrefour and mergers such as Sainsbury's and ASDA, which was eventually blocked by regulators in the UK – are becoming more viable options to grow the top line.

DEFINING CHANNEL STRATEGY

The fragmentation of the FMCG landscape continues apace. Across the channels we've analysed, there is an obvious divide between those doing well and those struggling to keep up.

E-commerce is far outstripping any other medium—achieving 20.3% growth in 2018, accelerating on its 15% growth in 2017.

Growth has been driven by two elements: the acceleration of both Amazon and the disruptive offers of Walmart in the US, and booming on- and offline integration in China—known as 'new' retail.

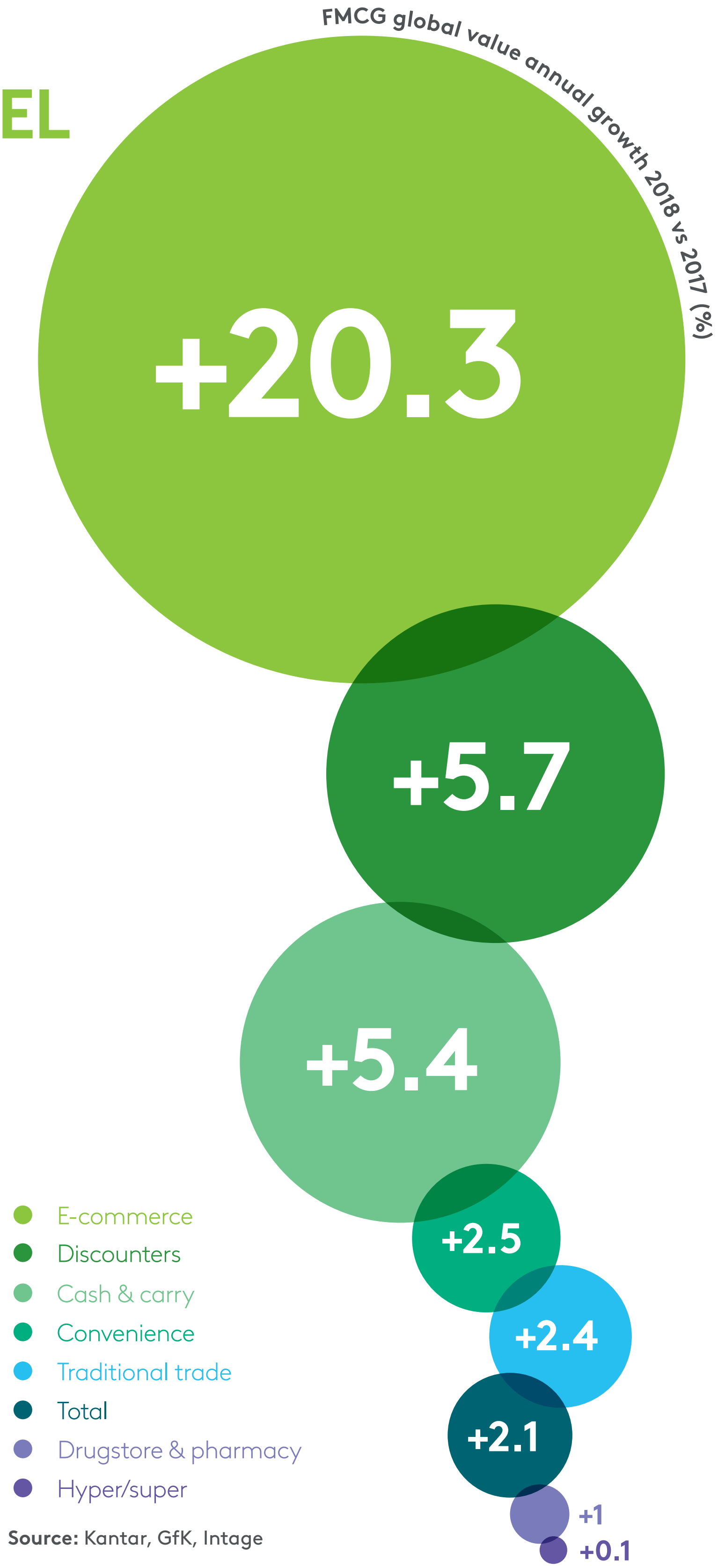
At the other end of the spectrum we have hyper- and supermarkets, seeing almost flat performance with 0.1% growth.

Discounters (+5.7%) and cash and carry (+5.4%) are the next-fastest growing channels, in line with their performance last year. The latter in particular has accelerated its growth, up from +4.6% in 2017—largely driven by growth in LATAM (+18%).

ADAPTING TO THE RIGHT AUDIENCE

Every channel has its fans. With a 6.5% share of channel consumption versus the 5.1% average, shoppers under the age of 35 are the champions of e-commerce. Similarly, the over 50s are the most prolific users of hypermarkets (51.4% share).

However, with young shoppers also being the heaviest users of traditional trade (28.2% share), it's important for retailers to consider the full demographic picture when developing their in-store and wider communications strategies.



Source: Kantar, GfK, Intage

The continuous decline of hypermarkets
Hypermarket value shares

Source: Kantar, GfK, Intage

HYPERMARKET DECLINE DRIVES INNOVATION

Hypermarket value share is dropping across the board. Of the 27 countries included here, just six have experienced any share increase whatsoever. Moreover, the 'big format' hypermarkets – the likes of Carrefour and Auchan, which were once so dominant in France – are struggling to maintain that influence.

Since 2008, Carrefour's value market share in France has dropped from 12.9% to 10.1%, while Auchan has fallen from 8.6% to 7.6% share.

Several hypermarket chains have begun to reinvent themselves, in a bid to win back share—with initiatives including testing different store formats and atmospheres, adding restaurant and out-of-home offerings, or competing more aggressively on price.

FORECAST FOR FUTURE GROWTH

The retail landscape has been shaped by growing e-commerce, expansive discounter activity, and local market factors. But what will influence the global FMCG picture as we enter a new decade?

The emergence of the hybrid retail model – also known as 'new' retail in China Mainland – has led FMCG growth since 2016 and is unlikely to let up anytime soon.

Hybrid retail is being driven by the increasing forays of pure play e-commerce companies into the physical space, and by bricks-and-mortar retailers attempting to steal occasions from competitors through combined online and offline offerings.

Retailers in China Mainland, meanwhile, are demonstrating that it is not just a combination of channels, but innovation within channels, that can win shoppers over.

Some stores bring the processing and dining experiences in store, applied to produce picked minutes before by the retailer. The ability to create an experience that is bigger than the sum of its parts will continue to be popular with consumers.

CUTTING OUT THE MIDDLEMAN

We know brands have a much higher share online, with share around 83% compared to 75% offline. One of the ways they will win is by offering solutions directly to shoppers.

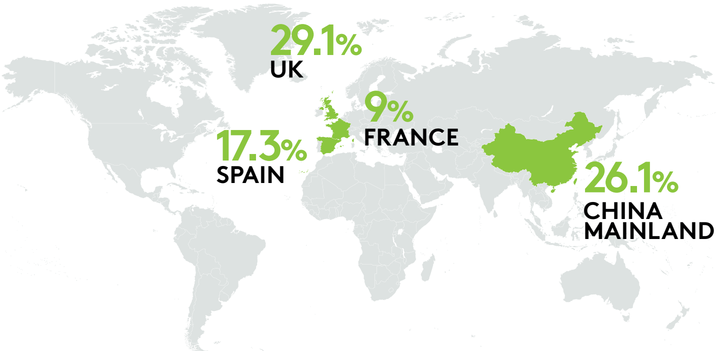
Direct-to-consumer (D2C) solutions are seeing a wave of investment from major FMCG companies. In 2019, Unilever acquired the healthy snack delivery brand Graze for a reported £150 million.

It's no wonder this type of retail appears attractive. D2C already reaches 30% of Chinese and British online shoppers, and its penetration is growing in markets such as Spain and France. In the UK alone, D2C shoppers spend an average of 22% more than online shoppers, reinforcing the view that D2C will be a key accelerator of growth in the coming years.

Hybrid retail is about attracting new shoppers

- **JUN 2017** – Amazon acquires Whole Foods, June 2017
- **JUL 2017** – Alibaba deploys Hema Fresh, July 2017
- **NOV 2017** – JD launches 7 Fresh, November 2017
- **JAN 2018** – Amazon Go launches in Seattle, January 2018
- **MAY 2018** – Walmart buys Flipkart India, May 2018
- **OCT 2018** – Kroger agrees deal with Ocado, October 2018
- **FEB 2019** – M&S agrees £750m food delivery deal with Ocado, February 2019
- **APR 2019** – Amazon announces expansion of Amazon Go, Pick Up and Click and Collect strategy, April 2019

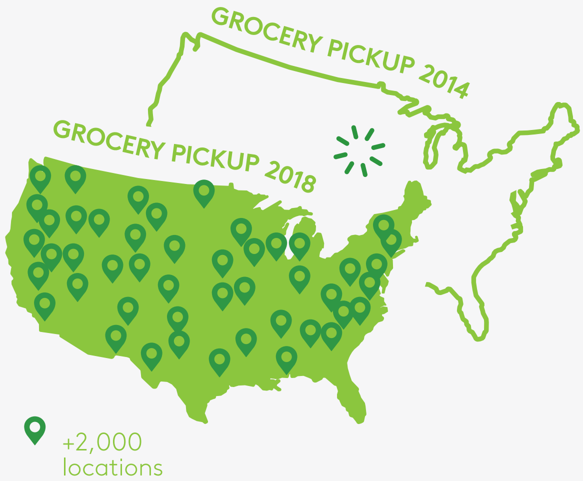
% online shoppers using D2C during the last year



D2C shoppers FY 2018	UK	SPAIN	FRANCE
E-commerce spend vs average online shopper	122	115	101

Source: Kantar / D2C defined as items purchased directly on the website of a manufacturer

Walmart has shown, through its activity in the US, the full effect of an effective combined online and offline strategy. From just one grocery pickup location in 2014 to more than 2,000 today, the grocer has seen stronger e-commerce sales as a result. Its partnership with Flipkart in India shows that this strategy isn't limited to one market alone.



Source: Alphastreet, Kantar

THE RISE OF CONSCIENTIOUS SHOPPERS

News outlets across the world have discussed the ethical and environmental impacts of the retail and FMCG industries at length. These narratives have resonated with consumers in many markets.

In 2018, Kantar surveyed shoppers in France and found the majority claimed to make more conscientious purchasing decisions—purchasing less to prevent wastage.

Similar numbers said they wanted to purchase environmentally friendly or locally sourced products as often as possible.

As we move into the 2020s, manufacturers and retailers alike will have to ensure they meet high ethical standards to win shoppers over.

MEETING URBAN NEEDS

More and more people are living in urban areas – as much as 66% of the world's population by 2050, according to the United Nations – while more than 30 cities across the world currently have 'mega city' status (more than 10 million inhabitants).

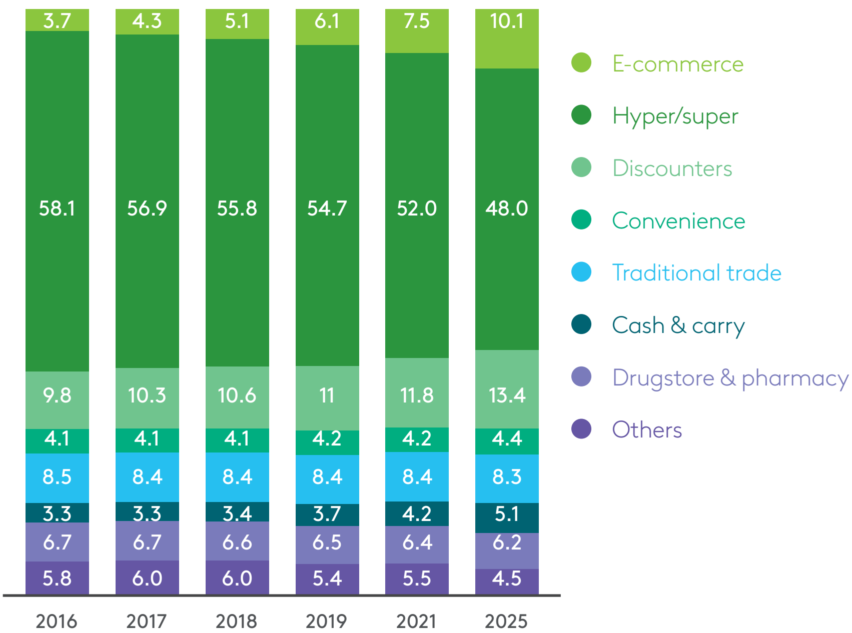
This is driving growth in formats such as pick-up points, unmanned stores, mobile formats and kiosks.

Urbanisation also highlights the importance of out-of-home (OOH) strategies. Global OOH consumption accounts for 46% of total spend on snacking and non-alcoholic beverages.

FORECAST 2025

As shown in the chart on the right, we also expect to see the continued rise of channels such as e-commerce (10.1% of total FMCG value share by 2025), discounters (13.4%), and cash and carry (5.1%).

% global value share by channel



Source: Kantar, GfK, Intage

GROWTH FORMATS: E-COMMERCE

A FRACTURED LANDSCAPE

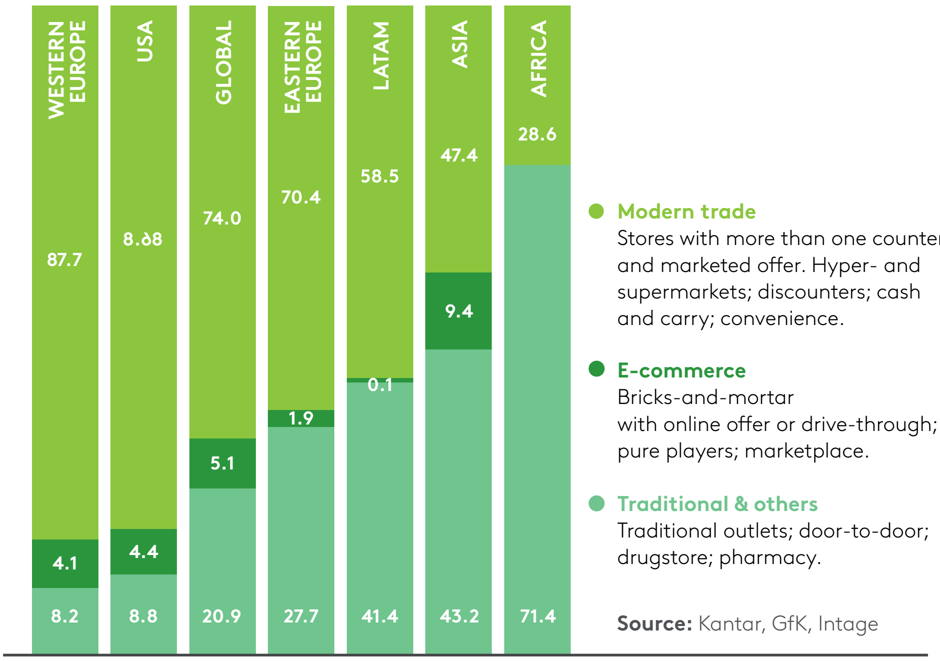
On the surface, e-commerce may seem small compared to modern and traditional channels, but it is a game-changer.

Globally, it already holds 5.1% value share—peaking at 9.4% in Asia, its most developed market.

But the e-commerce environment remains fractured. Asia, where China Mainland and South Korea represent 14% and 19.1% of online spend respectively, and Western Europe (4.1%) might be leading e-commerce adoption, but Latin America and Eastern Europe remain severely underdeveloped.

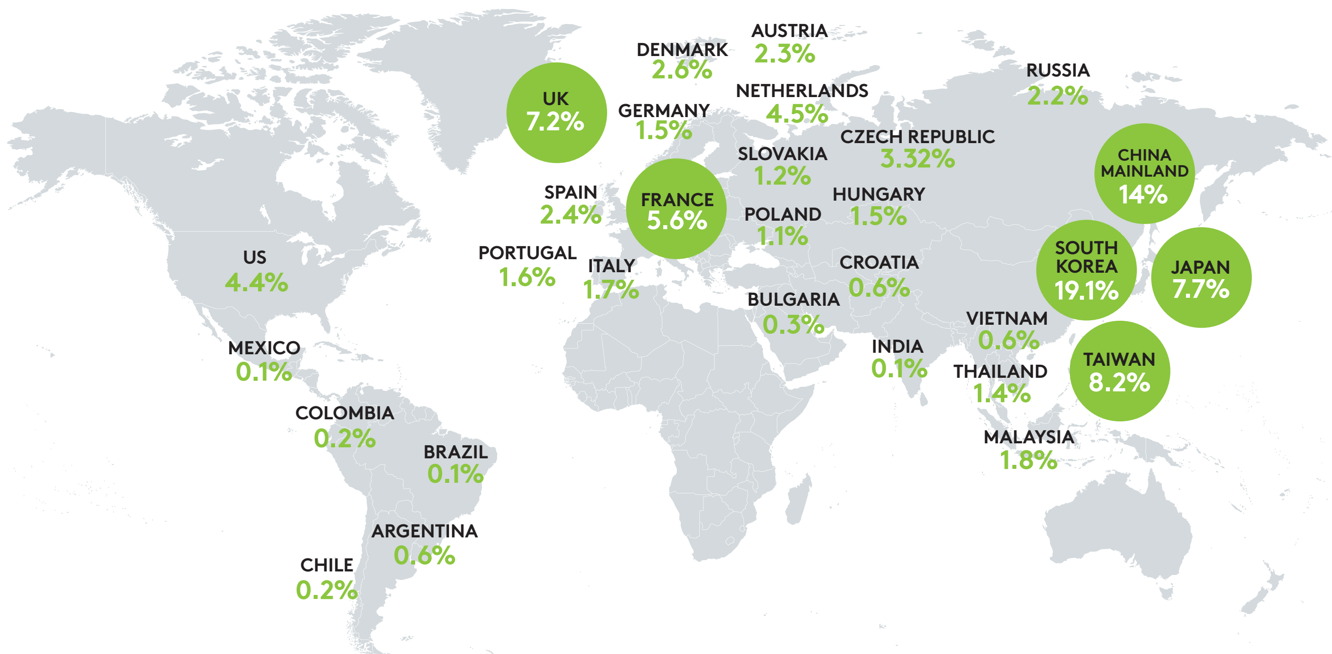
The channel is also noticeably fractured by category—especially in health and beauty, which represented 11.2% global share in 2018 compared to 4% in food and 8.8% in homecare.

E-commerce % value share (2018)



Asia dominates e-commerce, US emerging

Online value share in FMCG (2018)



Source: Kantar, GfK, Intage, US Commerce Department

GAME-CHANGING GROWTH

Yet e-commerce has enjoyed a story of remarkable growth in the last few years. Since 2016, it has seen universal growth in every region.

This has been prominent in Asia, where the channel's value share has grown from 7.2% in 2016 to 9.4% in 2018. However, the US is the market in which e-commerce is growing quickest—with 76% growth in two years boosting the channel to 4.4% of value share.

Put simply, e-commerce is the channel with the most significant contribution to total FMCG growth. And by some margin. It far outstripped hyper- and supermarkets in 2018, contributing 42% of growth compared to just 4%.

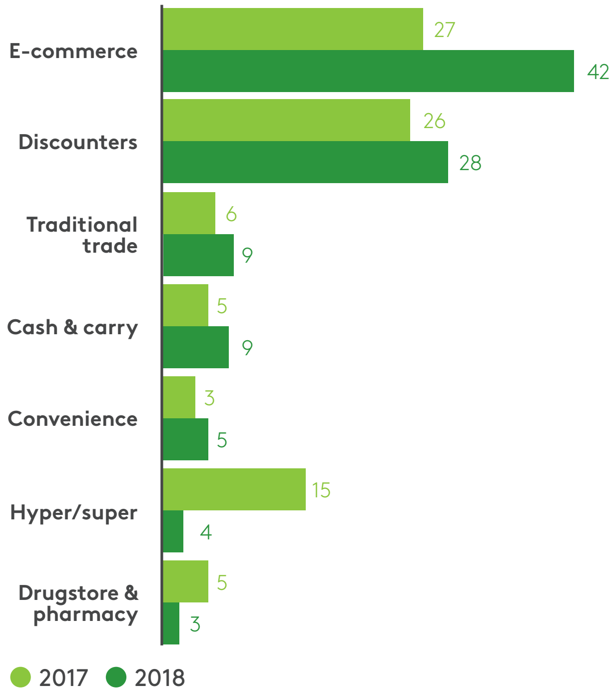
Not only is e-commerce the biggest contributor to growth, it is also the channel with the most untapped potential. Currently, e-commerce has global penetration of 21.6%—compared to hypermarkets' 69% penetration, for example.

However, it inversely has the highest spend per shopper of any other channel—at $37.2 per trip. This is driven by the tendency for online trips to be to 'stock up', with the purchase of bulk items, and these shoppers being more affluent.

When retailers increase their online penetration and frequency, there will be lucrative rewards.

E-commerce is obvious

% value contribution to global FMCG growth



Source: Kantar, GfK, Intage

DOMINANCE OF THE PURE PLAYERS

E-commerce growth across much of the world is concentrated among the pure players. This is most distinct in China Mainland, where 99% of e-commerce value resides with non-bricks-and-mortar retailers. It can also be seen in the US, with 60% pure play share in e-commerce.

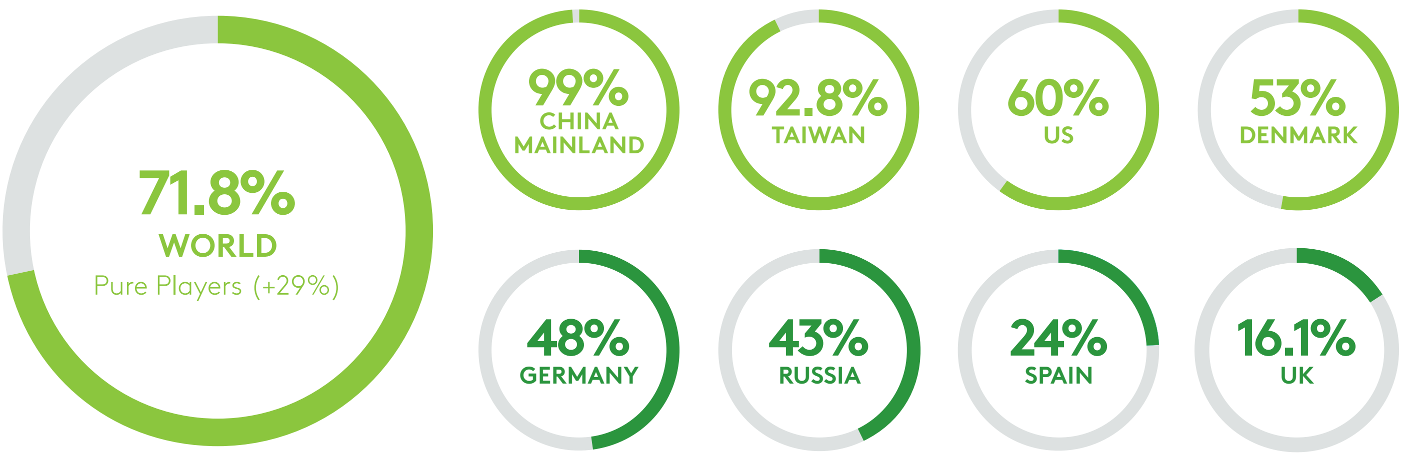
Western Europe is the exception, where established physical retailers dominate the e-commerce channel. The UK is the clearest example of this, where pure players hold just 16.1%.

However, Amazon – while still a relatively small player in Europe – is growing fast (+22% in 2018). Its share of the online market is just 1% in Great Britain, 3.2% in Spain and 5% in France, but its share of wallet is much higher—11.9% in Great Britain, 24.7% in Spain and 16.7% in France. This showcases Amazon's great potential for growth—its shoppers are very loyal, spending far more on each trip than the average for this channel.

The challenge for Amazon, now, is how it can bring more shoppers to its platforms—in particular its Prime offering.

Pure players dominating e-commerce and concentrating the growth

% value weight Pure Players vs Bricks (2018)



Source: Kantar, GfK, US estimates

CROSS-BORDER E-COMMERCE

A growing trend in e-commerce is aggressive cross-border activity, especially in Asia. In 2014, such sales from China Mainland totalled around $5.5 billion, but by 2022 this is expected to reach $92.7 billion.

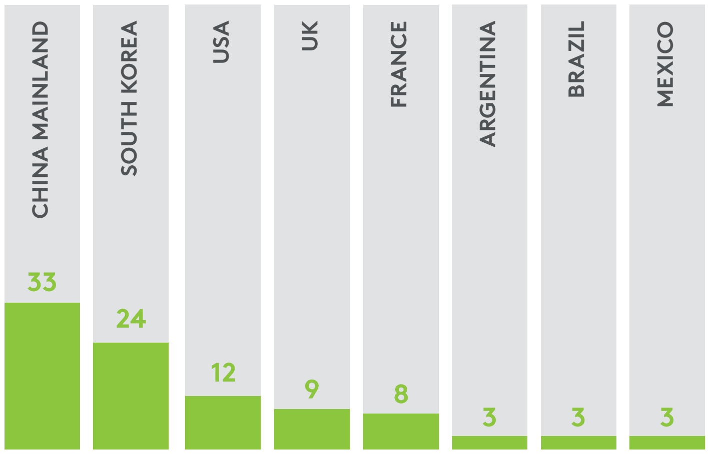
This Asian cross-border activity has been driven both by retailers, such as Chemist Warehouse, Matsumo Kiyoshi and Costco, and by brands—which now have a larger appetite to develop an international reach.

Emerging markets are continuing to drive growth in online retail—especially in Indonesia, Vietnam and Malaysia. As a result, by 2025, e-commerce will be the leading retail format in Asia. In China especially, it will reach a third of the entire FMCG value share.

Countries that currently lag in the e-commerce value stakes, such as Brazil, Mexico and Argentina, are expected to become bigger adopters of online FMCG purchasing than many western European markets. In mega cities, shoppers are looking for convenience.

In 2025, FMCG online will be leading retail in Asia

Projected % online value share in 2025



Source: Kantar

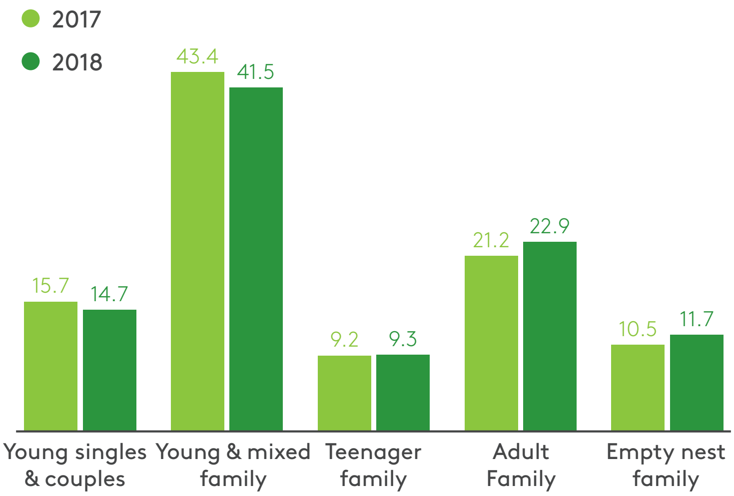
E-COMMERCE IN CHINA MAINLAND

E-commerce in China Mainland is distinctly different than it is in other markets. Older consumers are particularly important—the number of empty nesters who shop online has grown by more than 47% since 2017.

And retailers are starting to take notice. Taobao, for example, has launched simplified designs of its apps to help older shoppers. These solutions can be linked to the accounts of shoppers' children, in case their parents do not have access to a digital payment solution.

A unique Chinese trend is mobile e-commerce through social messaging service WeChat. A staggering 25% of the Chinese population make FMCG purchases through the platform. WeChat is opening up new consumer-to-consumer purchasing occasions, third-party online shopping solutions, and is providing products itself through its WeChat store.

Total FMCG e-commerce value share



Source: Kantar, CTR

GROWTH FORMATS: DISCOUNTERS

WORLDWIDE GROWTH

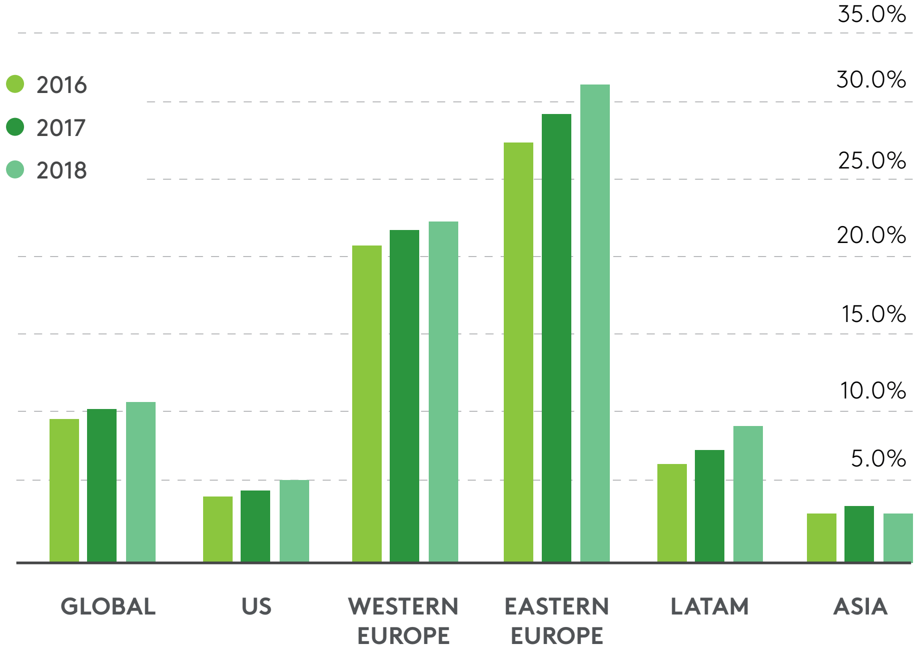
In last year's *Winning Omnichannel* publication, we reported that Eastern Europe was the most developed region for discounters. This remains the case, but what's remarkable is that value-for-money models have grown in value share across all regions except Asia.

Things could be very different in Asia by the end of 2019, however, with Aldi recently opening physical stores in Shanghai and planning to open 50 to 100 more in China.

In Eastern Europe, discounters control a FMCG value share of just under a third (32%). Discounters in Poland now enjoy 40.4% of FMCG value share in the country, a gain of 4.2% points since 2016.

In fact, only five countries across the world have experienced discounter decline—and in most cases losses in value share can be attributed to local market factors.

Discounters FMCG value shares



Source: Kantar, GfK, Intage

IMPORTANCE OF STORE OPENINGS

This universal growth has been driven by large investment in the discounter model and a surge in store openings across markets.

There are differences at play, however. For instance, the discounter landscape in Latin America is dominated by local players. The biggest players in Brazil (TodoDia), Colombia (Ara) and Mexico (Bodega Aurrera) are all unique to their respective markets.

The European discounter environment, on the other hand, is dominated by global behemoths embarking on intensive expansion programmes. In 2018, Aldi opened more than 70 new stores in the UK alone.

Now, the global players are turning their attention to the US. Here, Aldi and Dollar General are growing their stores at a rate of 7% per year. Lidl also plans to rapidly expand its footprint to 100 stores by the end of 2020.

Shoppers value convenience and price above almost every other factor, so it makes sense that discounters are succeeding by opening new stores that bring their services to more customers. In the UK, low-price retailers are growing both physically and in value—while premium models such as Waitrose suffer.

In order to maintain their rise in the short term, discounters should continue improving shopper loyalty through better in-store experiences and focusing on high-quality fresh produce. In the longer term, they will need to establish robust e-commerce offerings that will cater to shoppers' growing demand for convenience and choice.

TOTAL UK GROCERY (all outlets)	2018 spend growth (vs 2017) + 2.5%	2018 change in number of stores (vs 2017)
TESCO	+ 1.7%	+ 0.1%
SAINSBURY'S	+ 0.7%	+ 1.3%
ASDA	+ 2.2%	+ 0.7%
MORRISONS	+ 1.4%	+ 0.6%
ALDI	+ 11.9%	+ 16.7%
COOP	+ 3.8%	+ 1.8%
LIDL	+ 10.2%	+ 19.2%
WAITROSE	− 0.8%	− 3.3%
M&S	+ 0.3%	+ 5.0%
ICELAND	+ 1.7%	+ 5.7%

Source: Kantar

GLOBAL MARKET INSIGHTS

INDIA

K Ramakrishnan,
Managing Director India,
Worldpanel Division, Kantar

India's geographical make-up is predominantly rural. Almost two thirds of the Indian population live in rural areas—and they purchase around 56% of the country's total FMCG volume. In the past decade, rural households have increased their consumption levels significantly, while urban households have become more cautious buyers.

However, rural retail is almost entirely through traditional channels. There is also little diversity found even in urban areas, with 71% of all urban FMCG purchases made in small neighbourhood retail stores (called Kirana stores). Just 2% of FMCG purchases happen in supermarkets, and less than 1% is bought online.

A SHINING EXAMPLE FOR GLOBAL FMCG

Many have heard about Patanjali revolutionising the FMCG market in India—and it was held up as an example to the rest of the world in 2018's *Brand Footprint* publication. While it is now available across retail formats, Patanjali tasted initial success in being available in single-branded, franchised stores—a format that had previously not been explored successfully in FMCG.

Today, nearly 25% of FMCG purchases happen in these formats—and Patanjali remains the runaway market leader. In fact, part of Patanjali's rapid success was due to the fact it was available only in these stores—so, someone who tried a Patanjali toothpaste would end up with two or three other Patanjali products in their basket.

E-COMMERCE HAS A LONG WAY TO GO

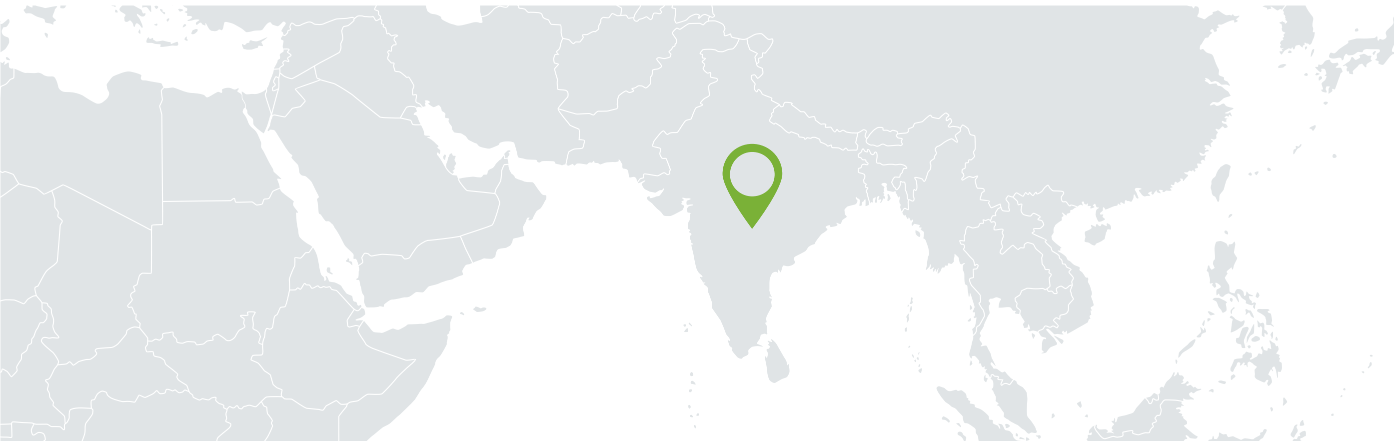
In 2018, FMCG in urban areas lost around 3% in volume terms but gained around 12% in value—reaching $30 billion for the first time. All major retail formats grew, with e-commerce the fastest as it quadrupled in a year.

Yet, with a very small base, e-commerce still has a long way to go. The value of the channel, including non-FMCG, was estimated at around $24 billion in 2017 and is expected to triple by 2021. For FMCG, however, e-commerce – with less than $25 million annual sales – is almost non-existent versus other channels.

Amazon's entry into India, with Amazon Pantry, is one of the reasons we see growth picking up in 2018, while Walmart and Flipkart's merger will have a positive effect, too.

Nevertheless, these developments aren't disruptive enough to make one extremely bullish about FMCG and e-commerce prospects. Manufacturers like ITC are now looking to launch their own e-commerce stores, limiting themselves to selling premium products—perhaps pointing to a sentiment that online FMCG purchases are typically made by higher-income households.

For now, we will see e-commerce growing steadily but remaining a relatively small channel for FMCG.



USA

Bryan Gildenberg,
Chief Knowledge Officer,
Consulting Division, Kantar

Though the retail world of the 2020s is often predicted to be complex and everchanging, it's important to remember there are some simple tenets that paint a relatively straightforward picture.

YES, ONLINE WILL CONTINUE TO GROW

By our measures, US e-commerce will gain around 1.5 share points per year, and that rate of share growth is accelerating even as the projected rate of e-commerce growth slows.

But individual categories will see uneven increases. Our projection for online grocery in the US is that it will reach 12% of share by 2025. About half of that is likely to come from Amazon, while the other half will primarily come from omnichannel retailers like Walmart and Target expanding their online presence.

But, with e-commerce still less than 25% of total modern retail, it's critical to understand other channel dynamics. There are a series of physical retail channels growing in line with the 4.4% rate of total retail, and therefore outstripping the brick and mortar average: cash and carry, drugstores, discounters and convenience stores.

THE WINNING FMCG COMPANIES OF THE 2020s WILL BE THOSE THAT ARE ABLE TO DO THE FOLLOWING THREE THINGS:

1) Assess, by segment, which formats are driving growth—and understand those formats' different go-to-market strategies and requirements. Penetration growth requires conversion at the moment of shopper decision, and those conversion moments will take place in formats and retailers that are more different from one another than they are today.

2) Understand the various shopper journeys and experiences along the path to conversion. Reaching shoppers will require much more specific understanding of touchpoints and how they are used. It's highly possible that platforms like Instagram, Pinterest and Facebook will be more powerful shopper marketing tools tomorrow than conventional retail marketing programs today.

3) Envision a "post-omnichannel" world. Developing e-commerce capabilities is very much part of the first point above—it's a format driving growth and needs to be managed. Increasingly, FMCG companies are building siloes of e-commerce talent despite most of the major retailers they sell through having both bricks-and-mortar and digital platforms. This divide – between online and physical retail – will no longer be discernible, or particularly important, in 2025. Retailers will be managed as ecosystems or platforms for both creating and converting demand, and this integrated approach is the key to winning what's next.

GERMANY

Marc Knuff,
Global Retail Director,
GfK

In comparison to other major markets in Europe, Germany still has a very low e-commerce market share in FMCG (1.5%), and there is no dynamic growth in sight. But there are fundamental reasons for this.

E-COMMERCE AT A SNAIL'S PACE

Firstly, the prices of FMCG products in Germany are some of the lowest in Europe—and German shoppers are very price-sensitive. As a result, they do not usually accept higher e-commerce prices, let alone additional costs for delivery.

Second, the density of physical FMCG shops in Germany – even in rural areas – is quite high. This means shoppers usually pass a variety of shops throughout the day, for example when they're driving their car home from work.

Consequently, the average German shopper struggles to see significant advantages in choosing e-commerce—and, in fact, many Germans state that they feel pressured to be home in time to receive e-commerce deliveries.

Third, the first two points lead to a low involvement from the major bricks-and-mortar retailers in e-commerce. Some of them have tested different e-commerce services in select urban areas, but the majority of those retailers have not seen e-commerce as a promising business case—and have therefore not forced expansion into other urban, or even rural, areas.

Significantly, Lidl and Kaufland stopped their FMCG e-commerce business altogether in 2018.

More promisingly, Picnic – a new FMCG e-commerce pure player with good prospects – has entered the market. In the regions of the Netherlands it operates in, Picnic is the market leader—and it's now beginning to enter western Germany.

However, it is likely to take some time before we see it making an impact on the country's e-commerce market.

INGREDIENTS TO WIN OMNICHANNEL

Stéphane Roger,
Global Shopper and Retail Director,
Worldpanel Division, Kantar

From all the conversations we have every day with our clients, retailers and manufacturers, the big question is always the same: "how do we grow when, globally, volumes are sluggish?"

If we look exclusively at trade aspects, the past years have seen the decline of larger formats, the rise of value-for-money models, the boom of e-commerce, and cannibalisation between channels. This is a very challenging environment that is set to continue—and will require a high dose of reinvention to navigate successfully.

Luckily, within this reinvented landscape, shoppers are exhibiting behaviours that retailers can cater for in order to grow. They want frictionless experiences, good pricing and proximity—in the sense that they want a fast and convenient service.

Within Kantar's Worldpanel division, we think that by 2025 e-commerce will represent 10% of total global FMCG spend. By the same year, hyper- and supermarkets, while still dominant, will make up less than 50%.

The ascendancy of hybrid retail, the growth in D2C offerings, and the increasing need to meet the needs of urban shoppers, will propel future opportunities for growth within FMCG.

This edition of *Winning Omnichannel* has found some clear ingredients to include in the recipe for FMCG success.

FOR RETAILERS:

1. Provide simple solutions for shoppers, both in product selection and payment.

2. Adapt formats to an ever-urbanising customer base. Find ways to reduce the distance to consumers.

3. Provide an online and offline offer—essential in reaching the maximum number of shoppers possible. E-commerce alone is still not enough, being centred on 'stock up' and replenishment missions for affluent shoppers.

FOR BRANDS:

1. Use intelligent technology to drive new purchasing behaviours—through voice-controlled devices with simple, natural and intuitive interfaces, for instance. Brands need to embrace a complete revolution in their consumer interactions, working on how to be listed digitally first, before the physical shop.

2. Go direct to consumers. D2C shoppers are already a relevant target – especially in the UK and China Mainland – and very valuable in terms of FMCG purchase.

3. Display your conscience. Focus on local, natural and sustainable products in order to win the shoppers of the future.

We all know that universal FMCG growth is a thing of the past, and growth is now much more fragmented. In 2018, 96% of growth came from channels outside hyper- and supermarkets.

A new era of retail is arriving. Understanding its makeup must be central to any strategy, and the only way to accurately track developments in FMCG is through the use of in-depth consumer panels.

KANTAR

ABOUT US

Kantar is the world's leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else. Combining our expertise in human understanding with advanced technologies, Kantar's 30,000 people help the world's leading organisations succeed and grow.

FIND OUT MORE

If you'd like additional information on *Winning Omnichannel*, please get in touch with your usual Kantar contacts or email:

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