KANTAR

Insights through the lens of AI

Singapore 2023

https://www.kantar.com/campaigns/APAC

Insights in Asia Pacific through the lens of AI

There's much debate about the role of AI in marketing and advertising, both behind the scenes, and at the forefront of activation. Here's how Kantar in Asia Pacific can help you get the most out of AI.

Over the past few years, we've developed expertise in Applied AI across various areas, such as spotting emerging trends and forecasting, optimising product and concept features, measuring ROI of short and long-term investments, evaluating creative power, maximising customer lifetime value and creating data management systems.

Although many of our existing products already use AI and Machine Learning, we are exploring new workstreams to leverage the latest in Generative AI and Large Language Models. These workstreams enhance our solutions by improving speed of processing and collection, freeing up quality time for client insights and implications.

AI has many benefits for all of us, such as scale, quality, granularity, optimisation, forecasting, improving data quality and cost reduction. For instance, AI can deliver insights at a more granular and tactical level, optimise and create content to a greater level of nuance, and improve forecasting and prediction.

Across Asia Pacific, we are continuously investing in a multitude of new areas to leverage AI for driving internal efficiencies that deliver greater value for our clients. This allows us to be more efficient, do things better and do new things.

Get in touch to find out more

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3 things to do with AI

Do things more efficiently

Summarisation

- Survey verbatims
- Qualitative interviews
- Reviews, blogs, web articles

Automated reporting and querying

- Present results from charts/tables/models in natural language
- Respond to natural language queries

Do things better

Identifying topics, themes, attributes

- Topic mining
- Brand affinity/perceptions
- Emotions/needs/attitudes
- Standard NLP tasks

Prediction

- Encode text as "embeddings" and use in downstream prediction, eg
  - Predict likelihood to churn based on call centre data
  - Predict ad effectiveness based on dialogue between characters in ads
  - Respond to natural language queries

Do new things

Creative writing

- Create product concepts/ad copy (potentially with generative Image)
- Marketing materials
- Segment personas

Intelligent interviewing

- Conversational AI
- Smart research instruments (survey questions, discussion guides)

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Keep up-to-date on all things AI

Visit our global AI Hub

How AI-driven insights can help optimise brand growth

AI has been around in various forms for over 50 years; however, Generative AI models are capturing popular imagination in a way that previous technologies did not. In response, businesses all over the world are scrambling to create AI roadmaps and AI strategies that match the new pace of advances.

Our world is continuing to be reshaped by technology right in front of our eyes. And with the effects of inflation and the ongoing rising cost-of-living, many businesses are asking how they can manage the emerging complexity, deliver more with less and acquire actionable insights at ever greater speed.

Our comprehensive global access to high quality and meaningful proprietary datasets coupled with our brand expertise, deep knowledge of the consumer, and years of experience with AI and machine learning means that we are ideally placed to help you optimise growth opportunities with support of AI technologies.

At Kantar, we have a rich history of innovation in this space, with AI and machine learning deeply embedded across our entire product suite and ways of working. This booklet reveals key insights into what you need to know to navigate in this ever-changing world of AI and discover opportunities to shape your brand's future.

Please reach out if you'd like to discuss how Kantar's AI and brand analytics capabilities can help optimise growth in your business.

AI and Gen AI - what's the difference?

Both Traditional AI and Generative AI (Gen AI) are based on machine learning - algorithms that enable machines to learn from data without being explicitly programmed. However they differ in important ways.

Traditional AI

Traditional AI models are mostly focused on advanced analytic tasks such as prediction or clustering. They typically work with just one form of data and are trained for one specific task that they become very proficient at. They need to be trained from scratch or 'fine-tuned' to perform well on a different task.

Generative AI

Gen AI models on the other hand are based on foundation models that can ingest data of various types (text, image, video) and output any or all of these types. Gen AI models require lots more data (insanely huge amounts) than traditional AI models. But, when they are provided with that volume of data, they are more versatile: they can do things they weren't explicitly trained for, because the immense volume of data gives them more options to work with.

Neither form of AI is necessarily 'better' or 'worse' than the other. Each has its own benefits depending on the intended use, and in fact, in many practical situations, the best solution involves a combination of both.

A spectrum between two modes of exploration

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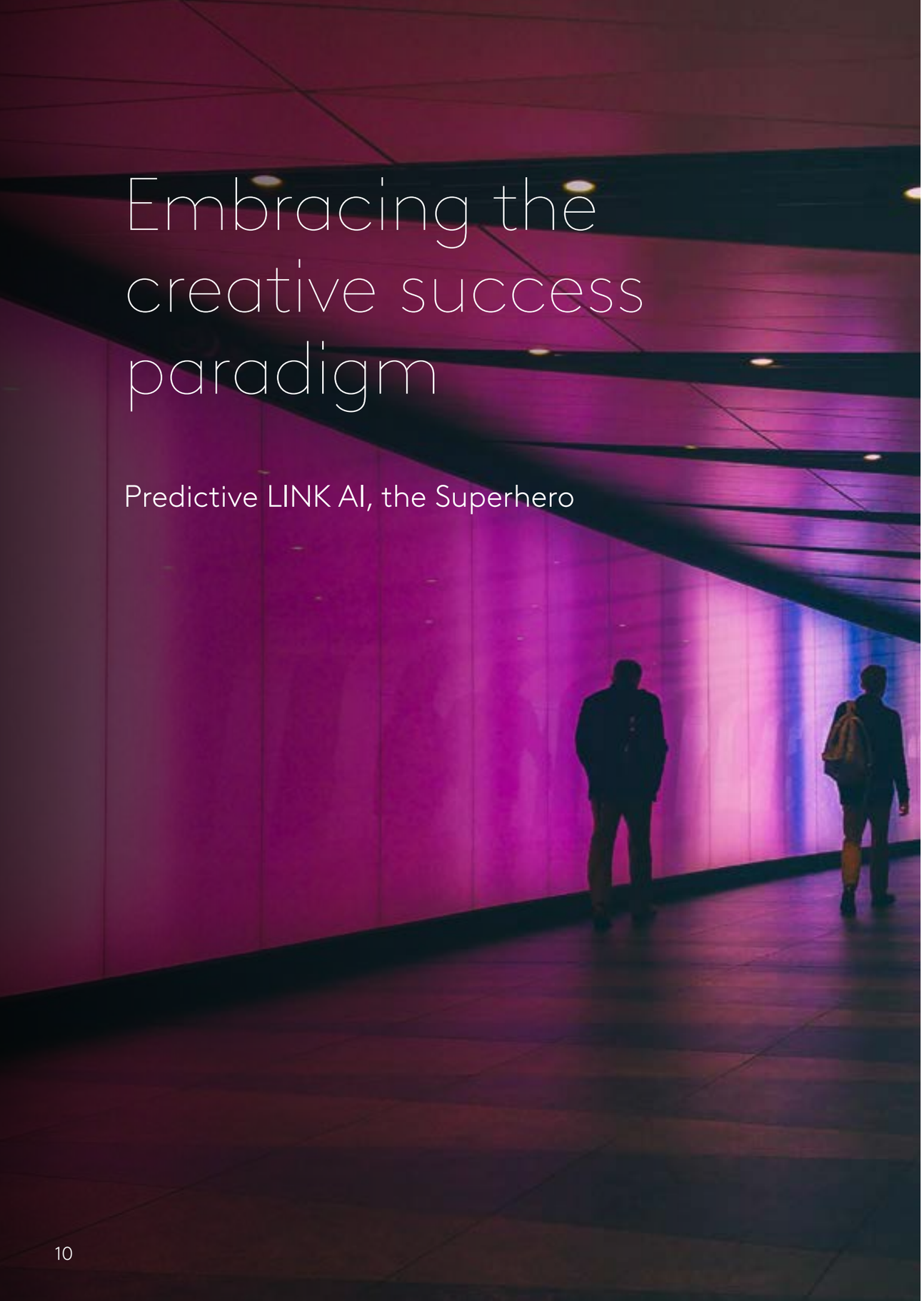
Brilliant minds have been working on the challenge of 'machines that think' since the 1940s when the fundamental building blocks first were conceived. Fast forward 80 years and ChatGPT (released 30 November 2022) is ubiquitous and it has been swiftly followed by varied generative brethren. Undoubtedly far closer than ever to the imaginations of Claude Shannon ('father of information theory') and Alan Turing ('father of theoretical computer science and AI'), the advent of these tools has been described in many quarters as signalling a fundamental shift in how industries, and even the world, must operate.

Undeniably, some of the capabilities that Gen AI implementations have demonstrated are intriguing, entertaining and impressive. Equally, some applications are distinctly troubling, whether for industry, labour or broader society.

Therefore, you should consider a spectrum between two modes of exploration: enthusiastic experimentation 'because we can!' at one extreme, compared to thoughtful 'should we, and what could go wrong?' testing and deployment at the other.

Both modes are valid and rewarding - the path chosen is often based on the values and objectives of the organisation, team or individual investigating the technology. Kantar has structured the development of tools for our business and clients so that the former (enthusiastic experimentation) takes place in the (secured, controlled) back room so as to incubate leaps in capability. Then, we can systematically build and deliver the latter (thoughtfully tested) solutions with confidence.

Ultimately, it's all about striving for the balance of enthusiasm and care when applying Gen AI (and indeed, any other technology) to our approaches, methods and techniques - and by extension to the goals and objectives of the brands we partner with.



Embracing the creative success paradigm

Predictive LINK AI, the Superhero

In advertising, as in life, we know that success comes to the creative, industrious and perseverant. The need to build connections with consumers is at the heart of all marketing. Refining what we say and how we say it came about when there were a lot more voices to compete against and brands needed their own pure, rarified voice that would be distinctive and magnetic.

With the digital boom, demands on content generation at scale and speed led to brands compromising in favour of presence over consistent impact. But we have lived and learned that just getting noticed is not enough. Recent work done on digital creatives at Kantar reveals that a quarter of the ads on digital platforms will have no impact, or worse a negative impact on brand associations and purchase intent[1]. Currently, letting even a single dollar of our spends go to waste is disastrous for business. But there is more to driving creative effectiveness than the risk of media wastage.

Creative quality is the single most important ingredient in driving campaign ROI[2]

It is critical to generating profits[3] - creative and effective ads generate more than four times much profit. So, if the key barrier to creative optimisation is cost and speed, it is time that those fence sitting (42 per cent) marketers reconsider their decision to not test and learn – thanks to predictive AI.

At Kantar, we understand the needs and constraints of clients and used our 250,000-rich advertising database to design the LINK AI model – a combination of different complex machine algorithms trained to predict linear and non-linear patterns in advertising across TV and digital. The features utilised by LINK AI can be categorised into:

— image embedding
— audio
— OCR (optical character recognition)
— transcript
— smart features like logo detection
— product displays.

Simply put, the machine deconstructs the creative, analyses it and reconstructs it to predict performance along with emotional and brand lift insights for digital content – all this in just 15 minutes at an extremely affordable subscription pricing.

1 Kantar Context Lab Database (YT ads)
2 Drivers of Brand salience at an overall campaign level. Source Mastering Momentum - Brand Exposure 2020, based on Kantar's Global CrossMedia database
3 Kantar and WARC collaboration 2023 for short and long-term ROMI impact

The next development is around celebrity recognition, given their prominence in ads across TV and digital, and the market transfer model.

The role of AI is informing how and where to deploy your digital assets

AI will categorise them for targeting and driving brand outcomes. At Kantar, we know that 82 per cent of ads are part of a campaign and when customised and well-integrated, deliver a 57 per cent uplift on campaign ROI[4] . Therefore, it is lifechanging to have the ability to run multiple ads and develop points of view on the performance of advertising across categories like the financial sector and the alco-bev category.

As we forge ahead with newer advancements, creative optimisation will reach near human-levels, and we will all benefit from access to this majestic tool that can help us sharpen our narratives pre-launch as well as in-flight. This would in turn future proof businesses and enable marketers to maximise the value of every dollar spent on media.

The future is in democratising access to insights that helps content flourish, be more meaningful and deliver creativity and effectiveness – every time and across every touchpoint.

4 Kantar global CrossMedia studies, 2015-2017, (223 studies). Categories: Food & Bev, Household, Retail, Travel, Personal care, financial services, technology, automobiles. Overall Campaign Contribution is a measure of campaign impact on a combination of all brand KPIs (awareness, associations, motivation)

Find out more about AI-powered solutions to grow your brand with extraordinary creative.

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Technology and brand tracking: the perfect marketing match

Discover how advanced analytics, AI and real-time access to brand equity metrics have built new habits for brand managers.

The vast majority of brand managers are uncertain about what's in people's minds. This is because 9 in 10 brands of a measurable status don't track their brand equity, which raises the question whether the Brand Manager job title accurately reflects their responsibilities.

The rise of brand tracking technology

We must admit that the old ways of tracking brand health were quite off-putting; sample was scarce and restrictive, the margins of error were high, the analytics limited, and nothing was quite at the click of a button. Over the last ten years though, we've gone beyond measuring attitudes; behaviour and neuroscience interpretations from survey and non-survey data got integrated within tracking and the number of brands in high clutter categories stretched beyond sufficient levels. The upgrade to mobile ready questions and the automated back-end dashboard solutions dialled up the (dare we say) enjoyment levels for both interviewees and tracker users alike.

So, if you are a marketing director who boasts about award-winning advertising or a brand manager who shines through their product refinement cycles, there is now no excuse not to also focus on your brand's winning attributes. After all, unless you monitor your brand and your competitors, how would you know where to invest your marketing resources and the optimal time for doing so?

Choosing the right brand tracking solution

It's decision time. Your desired brand tracker should score high in its ability to do the following:

1. **Get the whole picture, not just part of it**

Don't settle for anything less than continuous tracking. The difference between a monthly bang and a daily spread of respondents resembles the contrast between a static, pixelated image compared to a moving picture in high resolution. Continuous tracking offers a panorama view; a moving image with a great deal of definition that relates to the sequence of your activities.

BrandNow™ on Kantar Marketplace is our latest solution to build on the legacy continuous tracking that Maurice Millward & Gordon Brown invented back in 1976. It collects survey responses every day of the year in each category, allowing for a crisp analysis and a generous slicing and dicing of our quality sampling. Have you felt in the past that some of your own or your competitors' activities have fallen off the radar despite your respectable yearly sampling? It's time for a change.

2. Watch the vault at all times with AI

Steady now, there won't be a heist. But different metrics will move at a different tempo. Functional and direct metrics that measure behaviours will be moving fast, whereas emotional and indirect equity indicators will shift slowly in line with attitudes. You need to ensure that in all the commotion, you won't fail to notice that sedate moving of the needle in your equity metrics; for instance, a slip in your Demand Power or even a spurt in the competitor's Pricing Power.

Even if some metrics won't move daily, data should be updated every day and for everyone's sanity, the façade of it all should be a self-serve dashboard powered up by analytics.

BrandNow uses an AI capability that can filter out the random noise inherent to surveys (detecting structural changes, seasonality and outliers), can forecast how metrics are likely to move over the next three months and, soon enough, will alert you of all that with notifications. Keen to identify risks and opportunities on the fly? Look no further.

3. Integrate the short and the long term

Most companies are still struggling to prioritise brand building. According to Marketing Week's Language of Effectiveness Study 2023, less than half (42.5%) focus on brand marketing compared to performance marketing. The data and insights gap is widening, and only 23% of marketers measure the short and the long term in an integrated way.

But marketers' advocacy for an integrated viewpoint (86% of them concur it's important to measure effectiveness in the short and the long term) shines through brightly. Brand tracking has grown up, so make sure you detect this maturity when looking for a platform: it's got to be able to measure the interactions between the short and the long term.

BrandNow, powered by Kantar's Meaningful Different Salient (MDS) framework, answers marketing questions with a combination of both short- and long-term measures in a highly visual dashboard. Keep tabs on a specific campaign response in real time while monitoring the forecast trends of your brand equity metrics. Keen to measure and diagnose the intangible asset of a brand in your scorecard? The integrated MDS framework will equip you amply, measuring the value of brand equity accumulated in the minds of consumers – its impact on penetration and market share, its impact on willingness to pay, and its impact on future growth potential.

No ifs and buts. It's now easier than ever to track your brand

A few years ago, the role of brand manager was included in David Graeber's list of BS jobs – brutal but likely an accurate observation unless you can show your brand tracking data. BrandNow is your ticket to exit the list (or, in fact, never to enter it). More importantly, it is your ticket to lead your brand to sustainable growth and long-term success.

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What could Generative AI mean for advertising and concept development?

Generative AI is a technology exploding with possibilities for marketers. Kantar experts discuss the evolving potential for using AI to analyse images and video in advertising and concept development.

Generative AI is empowering people to express themselves and interact with the world in ways that were not possible even just a few months ago. It is a technology exploding with possibility now we consider the potential for multimedia, such as images and video. We explore what Generative AI could mean for visual creative and concept development - the potential to help companies craft ads or new concepts that more deeply resonate with people by tapping into their needs in new ways.

One of the most common questions raised about AI is, can technology really replace what is usually considered to be the uniquely human ability to be creative? We would say the answer is partly yes and partly no:

— Yes, in the sense that Generative AI has advanced to the point where anyone can, with a few simple prompts, generate what looks like amazing art, using tools such as Midjourney, DALL-E, Canva text-to-image, Fliki, Synthesia and Peech AI (to name just a few).

— But also no, as Generative AI is built on a vast human database containing the work of real artists and their styles. This enables the technology to do what it does, but human artistry has not been replaced. Strategically, prompting and moderating the outputs of AI systems will become a prominent role in the months and years to come.

But asking if technology can 'replace' a person may be the wrong question. We argue that humans and technology, when combined optimally, result in a better product.

AI in the creative development process

AI has a long history in the creative process - it's not new. At Kantar, we help companies with solutions like Link AI to test creative variations in bulk and make rapid, confident decisions about which ads to run, and NeedScope AI to analyse a brand's imagery and video to understand the degree to which they are in alignment with the brand's targeted emotive positioning across touchpoints. We are also in the process of enhancing our Concept eValuate product to use AI to automatically identify and optimise innovation concepts with the most top-line growth. These products are informed by high-quality training data – Link AI is built on a database of over 250,000 campaigns and 35 million human interactions.

Using image and video AI in creative and concept testing

1. Concept evaluation

Imagine spending a lot of effort creating an ad or product concept that is likely to underperform. With Generative AI you could make near-instant changes to the original copy and re-test those changes to see if they outperform the original. The text in the concept could be used as a Generative AI prompt to create a more compelling image that captures the essence of the concept. This could be an iterative process where both the text and image(s) are refined together with oversight from a human analyst.

We tested this approach on a real product concept for a ready-made ingredients box delivery service. First, we used GPT-4 to optimise the text, which gave us a higher predicted performance than the original. We then used DALL-E to optimise the concept imagery and found the combination of optimised text and imagery, reviewed by a human achieved the highest performance.

2. Video summary

Our Link survey asks respondents to summarise an ad in their own words. This is valuable to media agencies who want to know if the ad conveys the intended message. If ads can be accurately summarised at scale, without asking respondents for input, they can be catalogued and subject to a meta-analysis on best practice from the most successful ads (or themes that are common to underperforming ads). Generative AI, when combined with Optical Character Recognition (OCR) - the process of recognising text from images - can help achieve high-quality video summarisation faster with fewer human inputs. This is again something we are actively pursuing at Kantar.

3. Creative shaping

While Generative AI tools are built for images, you can split a video into multiple images, pass them through image AI tools to edit them appropriately and stitch the results back together. Such edits could range from relatively simple (changing the overall colour palette of the ad) to very sophisticated (replacing an actor with a celebrity). This would drastically scale up the number of combinations that could be produced, tested, and re-tested in less time, with less effort. Human creativity supercharged by Generative AI technology. This is an ambitious idea with the current state of Generative AI technology, but it is something we are already testing and are excited about.

So, we can get rid of humans, right?

Definitely not. For a start, machines cannot understand the nuance of a brand's identity and personality, which is a crucial component of creating content that fits a brand's commercial and community objectives. The art of storytelling, of stitching together a compelling and authentic narrative, remains a distinctly human one. As is the art of using emotion appropriately to elicit the desired responses. A machine cannot make the right cultural decisions, consider principles of diversity and inclusivity, interrogate a brand's purpose, etc.

And of course, things can just go wrong. Brands like Mint Mobile have humorously played with this concept: in January 2023 the company released an ad 'testing' ChatGPT's ability to write advertising scripts. The technology's limitations are played on, such as taking instructions literally, or not understanding the nuance of humour. The point is well made that humans need to craft the story. Coca-Cola understood this when creating their recent ad, which integrates AI smartly with live action and other digital effects, with stunning results.

Coca-Cola Masterpiece

So, our jobs remain safe. There is no doubt that the notion of creativity is evolving in a way that is expanding our own human ability to be creative, and that should excite us!

What are the risks?

Generative AI tools have made headlines recently, a notable example being when an AI-generated image won a prestigious photography contest and the submitter rejected the award to make a statement about the role of AI in art.

As with any new technology (particularly one as culturally transformative as this) there are risks, limitations and areas of uncertainty. Let's consider a few points specific to images and video:

— The IP status of AI-generated content is debatable, with no guaranteed right to exclusive use and the potential to infringe third-party IP rights (depending on the training data used). Each case requires an assessment before use for commercial purposes like a marketing campaign.

— There is potential to misuse someone's likeness. The misappropriation of elements deeply connected to an individual's identity (name, image, likeness etc.) may infringe their publicity rights or, depending on the country, personality rights with a similar scope.

— Collection and processing of images and video data need to comply with data protection and privacy regulations like GDPR and similar laws around the world.

— New AI laws may restrict certain uses and require rigorous risk assessments in others e.g., emerging biometric laws that will govern how we use data such as facial coding.

Much of this legal groundwork is being explored by governments. There are also pending lawsuits involving this technology, the results of which will impact legislation. However, it will take time for new legal frameworks to become clear. In the meantime, it will be partly up to companies to make their own decisions about how to use this technology responsibly.

There is no doubt that Generative AI is affecting the way we think about human creativity. Companies are already testing and applying this emerging technology to promote higher levels of productivity and creativity, and at Kantar, we are already pursuing many initiatives.

But we shouldn't forget that this technology is in many ways still in its infancy. There is important thinking still to be done, both within companies and society more broadly, about the role Generative AI can and should play in creative processes.

Fully automated creative outputs are probably not going to be the way to optimise creativity – rather, those in the creative space will need to become ever more adept at knowing how to get the best out of these tools, using the right prompts and moderation.

There are clear benefits in leveraging Generative AI to aid creative development. While the technology is new, companies need to start engaging with the possibilities now or risk being left behind, considering the role of this technology, used responsibly, to shape the most meaningful brands of tomorrow.

Our view on key Generative AI tools for image and video

Text-to-image tools

There are many Generative AI tools with more being introduced every day. In the text-to-image generation space, the most popular tools are DALL-E2 (powered by OpenAI) and Midjourney - these produce the highest quality images but require a subscription for access. There are also several free tools (such as Craiyon, Stable Diffusion) that can be slower and may produce lower-quality images. These free options still give valuable insights into how these models respond to prompts.

Whether using free or paid tools, the input prompts go a long way toward determining the quality of the output, perhaps even more so than in tools like ChatGPT that produce text output. Take the two generated images following – in the first example a very simple prompt is used, while in the second a more advanced prompt is used to create a more complex output.

Image 1 prompt: "Person smiling wide and holding a blue gum pack":

Image 2 prompt: "Street-style advertisement photo full-body shot of person in a blue jacket, smiling wide and showing his teeth, in downtown New York while holding a small blue pack of gum in a rectangular shape in his right hand and showing it to the camera like an advertisement, sunset lighting - aspect ratio 9:16 --stylize 1000":

Text-to-video tools

While Generative AI models have become increasingly proficient in creating textual and static visual content, an obvious next challenge is to develop models that can create and edit videos from text prompts. This would enable extensive use cases in creative fields like advertising and is a field of active research. Publicly available solutions are not quite as advanced as text-to-image alternatives.

Current tools such as Synthesia and Google's Imagen video are popular; however, it is challenging to create outputs that are not just spatially consistent (like the images generated by good text-to-image tools) in each frame but also have temporal consistency across frames (i.e., the frames flow together smoothly as a video).

Consider these surreal examples of fully AI-generated beer and pizza ads – clearly something has gone wrong!

Other technical challenges include the computational costs of creating long videos (beyond a few seconds) and the lack of extensive video datasets with captions on which to train these models. However, if history is any guide, we can expect rapid advances here within the next couple of years and it's an exciting space to watch!

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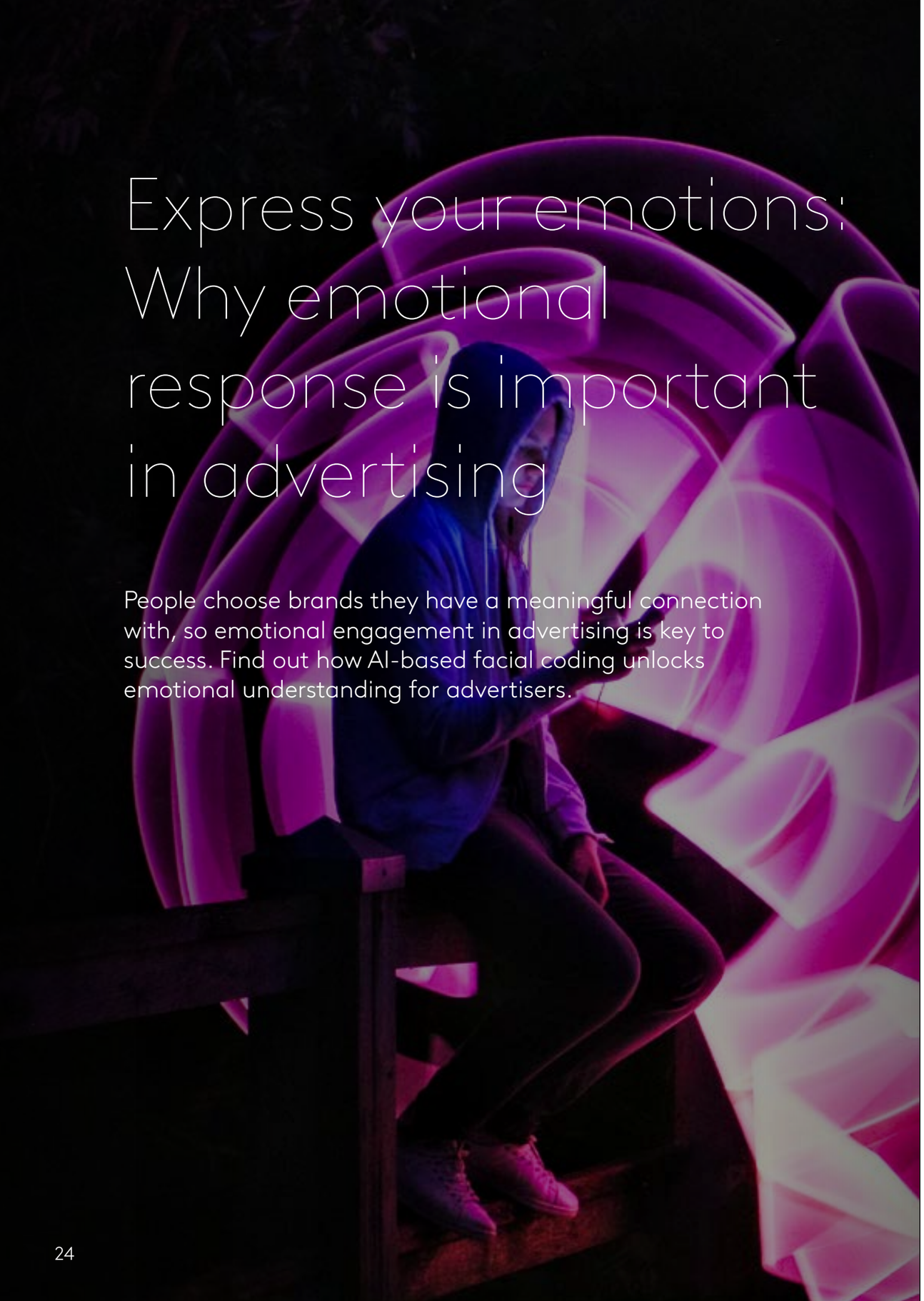


Express your emotions: Why emotional response is important in advertising

People choose brands they have a meaningful connection with, so emotional engagement in advertising is key to success. Find out how AI-based facial coding unlocks emotional understanding for advertisers.

Why getting emotion right matters

In all forms of advertising, it's important to drive brand engagement, convey meaningfully different associations and drive long and short-term predisposition. People are more likely to buy from brands they have a meaningful connection with, so understanding how advertising works means understanding the emotional engagement an ad generates.

At Kantar, we test advertising with a number of different measures, designed to capture the 'what', as well as the 'why', of consumer responses. Testing advertising results in better ROI. And better-quality creative can even compensate for slightly reduced media spend. Moving an ad's creative quality from average to best means a 32% increase in ROI. And we know that creativity is the second most important driver of ad profitability – so it's worth getting it right.

In our survey solutions, we ask a range of validated diagnostic questions about branding, enjoyment and the persuasiveness of ads, all of which can be compared to normative data. We also use a facial coding add-on, for a second-by-second time series read of emotional responses during the ad. Integrated with survey data, this is a powerful combination from which we derive actionable insights and recommendations on how to optimise the creative.

What is facial coding?

Facial coding is an AI-based analysis of facial muscle movements that allows us to measure facial expressions such as smile, brow furrow or raised eyebrows. We capture facial expressions from our panelists via webcams with explicit consent, the data is anonymised and aggregated.

In other words, the algorithms recognise expressions, not people. It measures and quantifies emotional reactions that people would find difficult to articulate otherwise. While people know that they smile or frown, they cannot precisely report the timing or strength of these responses. So, this information is extremely helpful to understand viewers' emotional reactions to advertising. It means we can test ads with people in their natural environment, to capture the wide range of reactions they show while watching ads.

The ease of data collection makes our technique scalable and allows for testing big, reliable samples, the value of which cannot be overestimated in market research. Full integration with survey responses means we can compare the emotional reactions of various groups, for example, those who liked compared to those who disliked the ad. This in turn enables us to explain an ad's scores and understand how each scene affected the ad's overall evaluation, along with survey and open-ended responses. Based on these conclusions, we can confidently give our clients recommendations for ad edits and improvements.

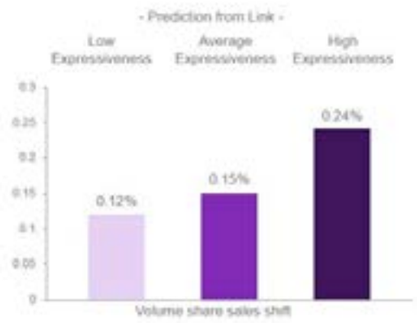
How does facial coding work?

Facial coding has an AI outcome: while algorithms provide information about the type, strength and timing of emotional reactions, the interpretation is done by analysts. This is crucial for reliable analysis, as the same facial expression can mean different things depending on the context. Kantar uses Affectiva's emotion AI technology which is trained on this diversity, and the human analyst assures the context is taken into account and can be explained. Our facial coding outputs are easier to interpret and understand than EEG, for example.

Contemporary, high-quality AI-based facial coding is grounded in scientific knowledge collected over more than 100 years and validated through numerous academic studies. The Affectiva technology is proven to be highly accurate as well as validated and published in peer-reviewed articles. It is also being constantly improved as more data is accumulated. Moreover, Kantar has captured well over two million face videos and researched over 49,000 ads using facial coding and we have validated the link between emotion and sales success. We have proven that our measure of overall expressiveness captured via facial coding drives shifts in sales volume share, especially for more established brands.

Our system 1 facial coding approach is validated to sales success

There is an underlying relationship between 'Expressiveness' from facial coding and sales uplift



So facial coding provides a lot of useful information about people's emotions that cannot be gathered otherwise, while keeping the testing situation as natural as possible. It tells us not just whether people are paying attention, but also how they feel. It enhances survey measures and exceeds all other implicit measures of emotions in terms of both ease of administration and utility of data.

Understanding different cultures

Not all facial coding technology is equally reliable. Some people question whether facial coding technology is potentially biased against different groups. Affectiva's technology has been upgraded many times over the last 10 years and each time the algorithms are trained on highly diverse datasets. The technology uses more real-world face data than any other organisation – over 13 billion frames of data from over 90 countries, and as a result, it is trained on predominantly non-Caucasian datasets with a balance in gender and age. Great care is taken to ensure equal accuracy across demographic groups so we can be confident that the system exhibits minimal bias. Affectiva's metrics are also interpreted in the context of the country of data collection – the system includes normative comparisons for every country, so analytics can allow for the fact that some cultures are more expressive on different dimensions than others.

The reliability and sensitivity thresholds used by facial coding are important. The Affectiva facial coding technology is trained rigorously and delivers high published accuracy and test-rest reliability. The technology uses a high threshold to minimise false positives (i.e. insignificant facial movements), but we still see measurable responses to advertising across almost all scenes – and the variation we see is meaningfully linked to engagement with the content. There are very few ads that don't produce a detectable facial response across an audience, but there is a wide variety of degree of response – reflecting the variation in emotional power in real-world advertising. It is naïve to assume that all ads will produce a significant emotional response all the time. Affectiva's facial coding successfully discriminates between engaging (and sales effective) ads and non-engaging ads, and also between engaging and less engaging scenes within an ad, which is exactly what is required in sensitive and diagnostic ad testing.

Facial coding in action

Sustainability is an area that evokes strong emotions and opinions, and sustainability campaigns are no different. We see that ads with social and/or environmental messaging evoke stronger emotions – both positive and negative. Campaigns that speak to these issues should do the same. And that means getting the emotional tone right. In ads with a sustainability message, for example, we know it is important to leave people hopeful, confident and empowered to change.

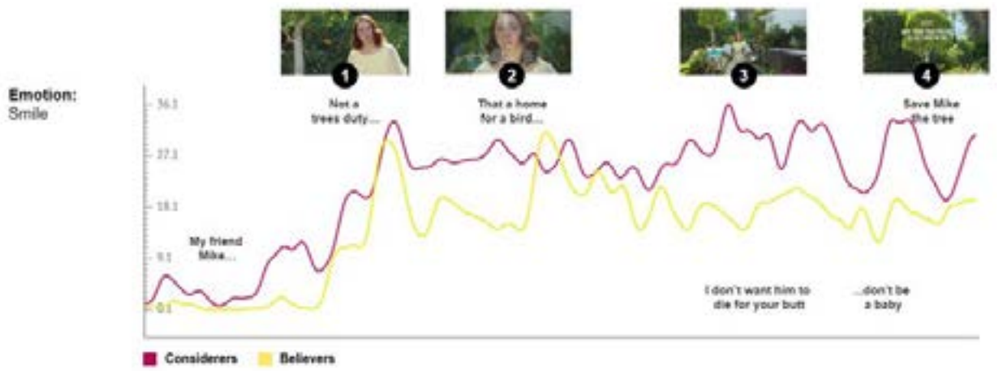
Seventh Generation - Trees and B's

Humour is an effective way to use emotion in advertising. Seventh Generation's ad for recycled toilet paper uses humour to communicate its sustainable message.

Watch on YouTube

Facial coding helps to understand how humour is resonating, and at which points in the ad. In this example, we looked at different groups of people based on how committed they are to sustainability.

The humour engages sustainability Considerers more than Believers



With facial coding, we can see that the humour makes the message more accessible for groups that are less committed to sustainability (Considerers). The ad evokes more smiles for considerers throughout, including during the 'save the trees' call to action at the end, so a useful tactic to get the sustainability message out to a broader audience.

Another ad we tested for a client had a very different response to what was intended. With facial coding and open-ended responses we found out that the scenes intended to be funny were not humorous. People weren't understanding the jokes, and one scene was even found to be offensive. A re-edit was required to ensure that the setup and the payoffs were paced correctly.

What about EEG? (Electroencephalography)

When we piloted EEG (recording brain activity) to understand advertising, we found it intrusive, vague in meaning, and unscalable. It provides information across far fewer dimensions compared to facial coding, and the accuracy is often lower. Academic papers have cited low comparability across different studies, and the intrusive measurement in unnatural conditions has potential to alter respondents' emotions, introducing an additional factor we don't want to measure.

Context matters for both EEG and facial coding, but with facial coding we measure several expressions, versus just one dimension in EEG. Even if a smile covers different emotions, it is easier for people to decode them (each of us does this every day, in every social interaction) than to understand the complex scientific terms and dimensions associated with EEG encoding. This means that many people can become skilled facial coding analysts while EEG requires trained neuroscientists to read the data.

Summary

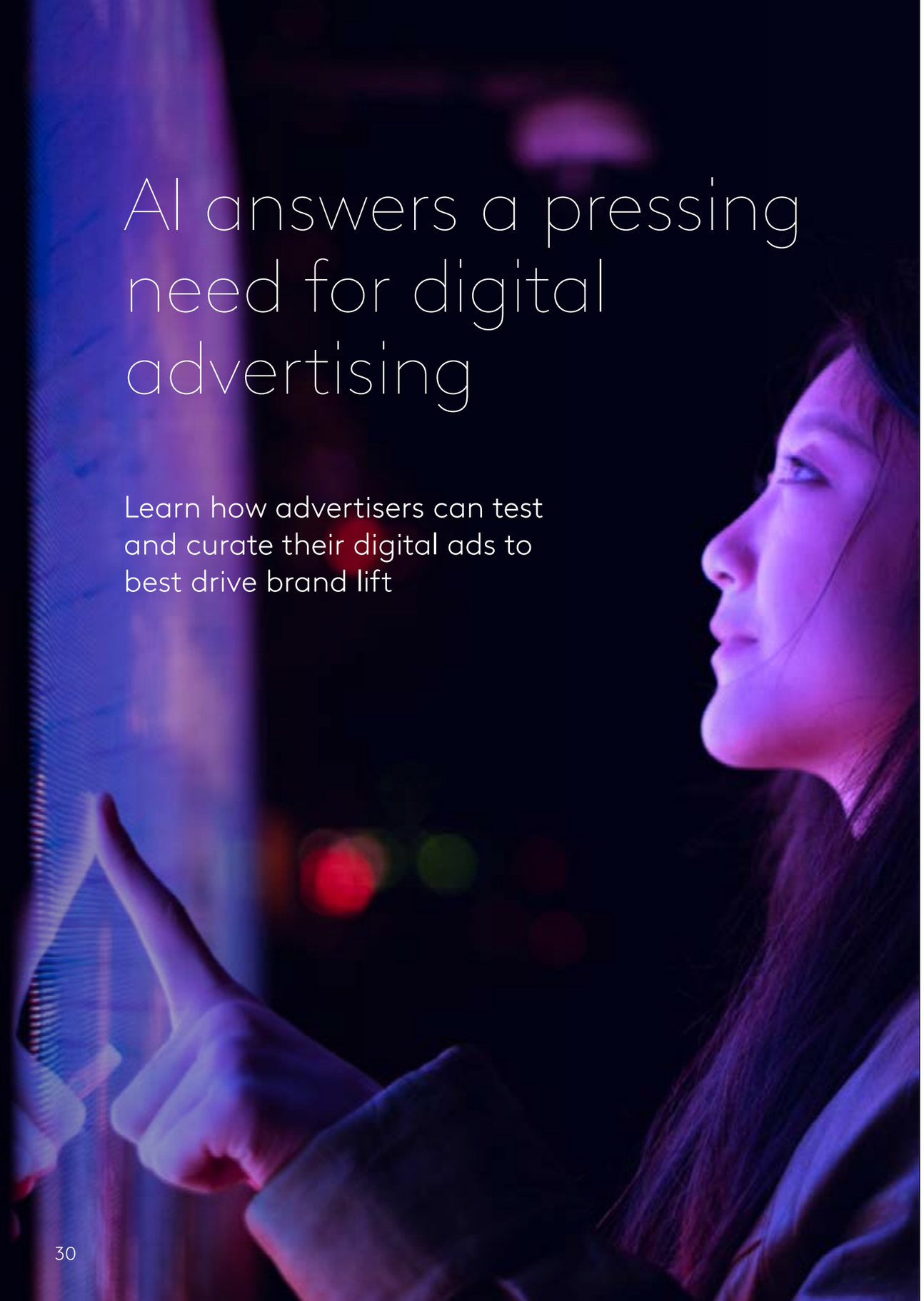
We think it's important to measure emotion in advertising – and we will soon be rolling out facial coding into our automated digital ad testing around the world via Kantar Marketplace. With increased investment in digital advertising, understanding how the ads work and why is even more vital. In the Attention Economy, every second counts.

Duncan Southgate

Senior Director
Creative & Media Solutions
Kantar

Jane Ostler

EVP Global
Thought Leadership
Kantar



AI answers a pressing need for digital advertising

Learn how advertisers can test and curate their digital ads to best drive brand lift

You all know the story. Responding to shifts in consumer behaviour, advertisers are seeking to leverage the power of digital to build brands, drive traffic, and promote products. In 2022, it is expected that digital advertising will take over 60% of global ad spend, with digital video and social media advertising accounting for a substantial proportion of that spend. And digital spend is only expected to rise in 2023, according to Kantar's latest Media Reactions study, with online video leading the way.

Digital advertising is increasingly becoming a high stakes investment

Digital advertising is now the biggest game in town, but many advertisers are still grappling with how best to place their bets. As the scale and quality of digital campaigns has increased, so too have the table stakes. Ensuring a good payoff is front and centre in most advertisers' minds, but that is not easy when so much content is produced, and in a wide variety of formats. Further, when it comes to brand building, most of the expected consumer response is attitudinal, and not just behavioural.

Brand lift studies have become a leading way to measure digital impact

To assess the impact of their digital brand campaigns, many advertisers turn to brand lift studies. Since the very first brand lift study in 1996, the methodology has evolved to become an industry standard, with the impact of tens of thousands of digital campaigns being measured every year. Advertisers use these studies to assess overall campaign efficacy, guide important media choices, and learn for the future. But no matter how useful and widely used, one problem remains. Most studies are only reported at the end of a campaign. And what most advertisers really want to do is identify their best performing creative before their campaign runs, so their campaigns pack the most punch.

Link AI for Digital now predicts brand lift before your campaign runs

To answer that need, the power of AI is already being used to quickly predict the likely efficacy of digital content. Until now, however, pre-screening was limited to predictions of viewers attitudes towards the creative and their likely behavioural interaction with the ad. Brand lift metrics still needed to be captured post-campaign. But now that has all change. Link AI for Digital on Kantar Marketplace can now test content at scale to indicate which ads will best drive brand lift, in addition to providing behavioural and attitudinal response insights.

For the first-time, advertisers can get a holistic, cost-effective prediction of the likely brand impact of their creative content, at scale, and in as few as 15 minutes. This allows you to scale your creative testing programs beyond the key, "must win" campaigns, to ensure that a higher proportion of ads are likely to meet brand building goals such as building awareness and driving consideration.

Use cases for AI in creative testing

While Link AI for Digital answers a widespread need for many advertisers, the application of AI has opened new opportunities to test and learn. Adding brand lift metrics into the mix only makes these opportunities more valuable. For instance,

— As the investment in digital advertising scales, so too does the investment in producing digital assets. To ensure that money is well spent, AI can be used to iteratively test likely brand impact and optimise content in real time.

— Many companies enable global access to their digital brand assets, but creative content often performs differently across cultures. AI can be used to test content to identify the ads most likely to work in a destination country.

— Competitive testing can be a bit of a holy grail, with most advertisers understanding the value but not having the time or budget to execute. AI changes that making assessments of the creative landscape quick and economical. Breaking campaigns can be tested in minutes, and the results used to inform both tactical and strategic decisions.

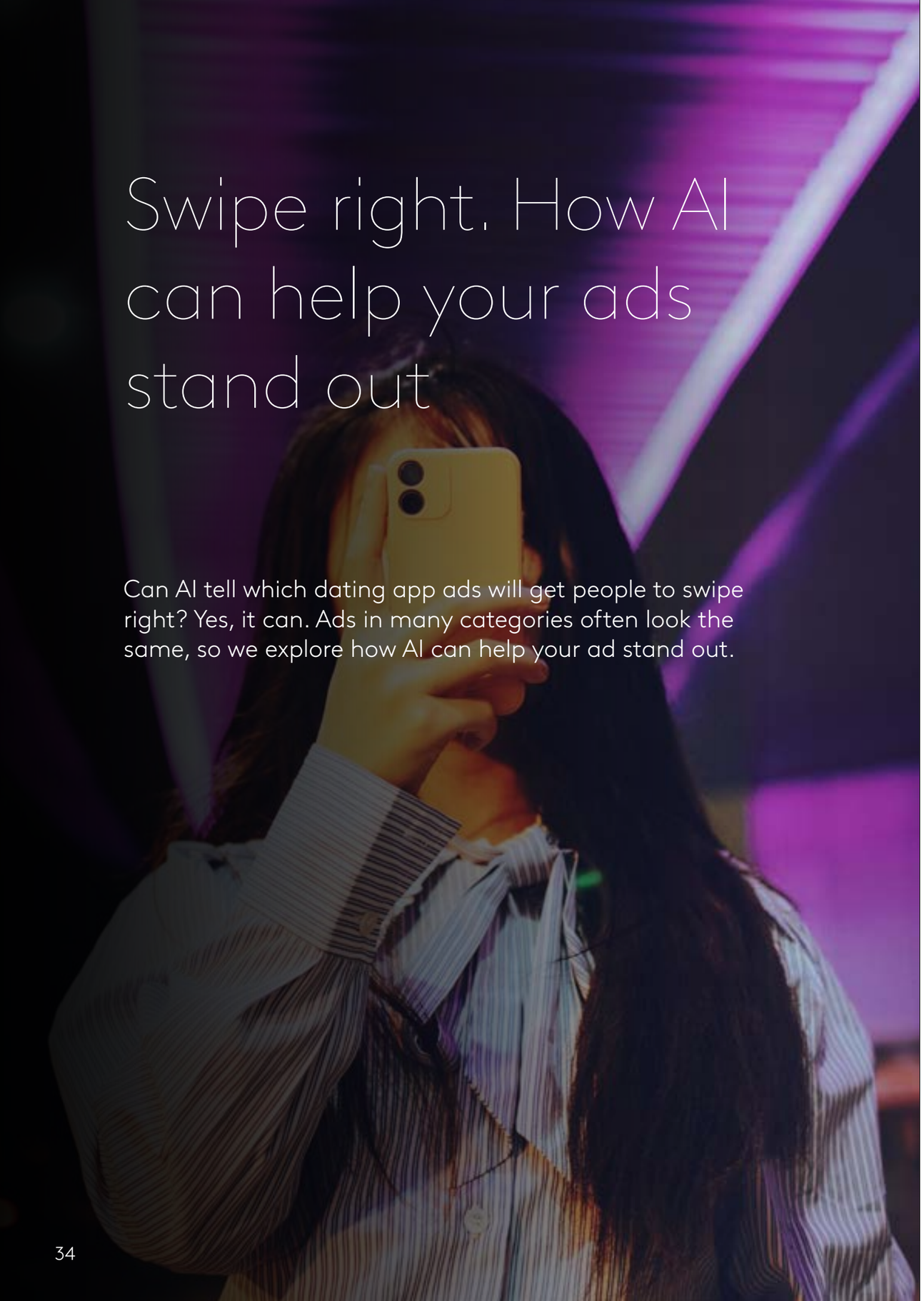
— Last, but not least, the use of AI allows for rapid batch testing and creative meta-analysis. Ads can be coded by creative elements, such as humour, sustainability or when the brand first appears, to identify which ones are most likely to drive brand impact across brands and product categories.

AI provides a good complement to established best practice

While the addition of brand lift metrics to Link AI for Digital is an exciting development, it is important to remember that the results are only indicative of likely performance. This makes Link AI for Digital a useful solution for the many occasions when an in-depth test is either not practical or too costly. However, particularly when seeking to change strategy or creative approach, a more in-depth assessment is still recommended. There is no substitute for measuring the response of real people to understand campaign effectiveness, and Kantar has extensive experience of what works with video advertising. Indeed, Link AI for Digital would not exist without access to the results from a huge number of pre-tests and brand lift studies.

Don't bet on digital ROI, test it instead.

Many times, it is only after the campaign is over when advertisers truly understand whether their big bet on digital brand building has paid off. Now, with the inclusion of brand lift metrics in Link AI for Digital, you can be out in front, predicting in advance whether your campaign will have the intended impact.



Swipe right. How AI can help your ads stand out

Can AI tell which dating app ads will get people to swipe right? Yes, it can. Ads in many categories often look the same, so we explore how AI can help your ad stand out.

My friends' stories about their experiences and perceptions of different dating apps got me wondering - just how effective is advertising in the dating app category? Looking at the ads, there seems to be a universal look, with attractive people, beautiful clothes and polished production that feels attractive but uniform, with little to differentiate them. And, as we shall see, it is not just my lack of personal relevance at fault.

Lack of distinctiveness is a widespread problem

The problem of brands using a category generic look is far from one that afflicts only dating apps. New cars driving effortlessly on a wet, winding road, happy kids munching on snacks, or the earnest but boring bank scenario. Tropes like these abound. And that's a problem, because when every ad looks similar people are likely to forget which brand an ad is for. While many factors play into whether an ad is impactful, ads that most people find distinctive are 2.3 times more impactful than those which few people find distinctive (Source: Kantar's Link Database).

What does the intended audience think?

Of course, no one sets out to create generic looking ads, but all too often it seems that a set of implicit guidelines evolves to cause every ad in a category to look the same. Like beauty, distinctiveness is in the eye of the beholder. And in the case of advertising, that means the intended audience. But advertisers rarely test competitive ads to learn what works in their category and how well their ads stand out from the competition.

What is the solution?

The use of AI in pretesting has opened a new opportunity to test ads from competitors across a given category, whether TV or digital, quickly and cost effectively. By doing so, you can identify which campaigns are breaking through and which have fallen into the look alike trap.

Using Link AI for Digital to test dating apps

Having seen yet another generic ad on YouTube, I decided to test a series of digital dating app ads using Link AI for Digital. To explore whether or not any of the ad campaigns have what it takes to make people swipe right.

With this objective in mind, I uploaded some ads into Link AI on Kantar Marketplace from four different dating apps. Link AI (for TV or Digital) uses learnings from our growing Link database of over 250,000 ads and machine learning to predict how consumers would rate an ad. Each ad takes about 15 minutes to process, while the machine parses the content for visual and audio characteristics and compares those characteristics back to the patterns identified from our Link pre-test database. The algorithm then produces a prediction of the likely scores on key creative pre-testing metrics, including Brand Power, Impact, Persuasion, Branding, Enjoyment and Affinity, and in the case of digital, predictions of skip time and action likelihood.

And the winner is Bumble!

So, what did I find? Well, if the analysis confirmed one thing, it is that it is difficult to judge whether ads will work well or not solely based on personal experience. Of the dating apps tested, there was one brand that cracked the advertising effectiveness code. Most of the ads tested for Bumble perform well, across the range of effectiveness metrics, notably branding and enjoyment, two of the most important.

Average percentiles for Branding and Enjoyment - dating app brands

	Branding	Enjoyment
Brand A	8	22
Brand B	9	38
Brand C	18	12
Bumble (average)	48	59

The winning ad, Bumble's 'Make the first move' on Facebook, scored the highest on most metrics.

Bumble's 'Make the first move' Facebook ad

All ads aim to persuade

But let me take a step back, because there was uniformity to the way the different ads were predicted to work. Out of the 15 ads I tested, 11 were predicted to score well on persuasion. All the ads are designed to convince the viewer that they have something unique to offer the potential user, and in doing so, even if they have a very different message, they end up sounding like a sales pitch.

A bigger problem than tone of voice, however, is that trying to convince people to sign up now is only going to be effective among the small group of people ready to date someone new. Unless a brand can afford an always on advertising strategy, it is far better to attract people with enjoyable, distinctive and memorable content, which highlights what the brand has to offer, so that when someone is ready to date, yours is the app that comes to mind.

Bumble uses its distinctive colour to good effect

My assessment of the ads in the light of the Link AI results suggests that the Bumble ads were likely to be well-branded because of the prominent use of the brand's signature yellow. Brands should make use of their distinctive assets to ensure that people realise which brand is being advertised and help create strong brand-linked memory structures. Coupled with higher-than-average enjoyment and affinity, strong branding meant that not only are the Bumble ads predicted to drive immediate response, but they are also likely to help build the Bumble brand long-term.

A creative idea that has potential

While I am not going to reveal which other dating apps we included in the comparison, there is one that has a campaign with the potential to be more effective than it is right now. The problem the campaign faces is a familiar one.

The ads use a consistent, clever, campaignable idea, and one that Link AI predicted to be reasonably enjoyable and persuasive, however, branding was very weak. There is little in the ads to link the creative idea to the specific brand. And, as noted, if people cannot remember which brand the ad is for then the impression is likely wasted.

And the also rans

None of the other ads tested are predicted to be very effective. One set is very fast paced, which probably impacted comprehension. The other brand's ads are less formulaic than the other campaigns, and so the results are more variable, but all executions are predicted to struggle for engagement, particularly the one featuring a series of people talking about their dating experiences.

Not all dating app ads are bland

Contrary to my expectations, testing with Link AI proved that not all dating app ad campaigns are vanilla. Bumble's Facebook ads were predicted to work well, even if the other brand campaigns tested all fell short on important effectiveness measures. But the other brands could use findings like these to improve. For instance, given the results, the brand with the engaging but poorly branded campaign, should be able to enhance their executions to better highlight which brand is being advertised.

Does your brand's advertising stand out from the crowd?

The opportunity to conduct this sort of competitor level assessment would have been prohibitive in the past, but with the ability test ads as scale, quickly and cost effectively using AI, new opportunities have opened. For instance, to validate their ABCD effectiveness framework, Google used Link AI to test over 11,000 ads in less than a month. Most advertisers are never going to test more than a fraction of that number, but they now have the chance to assess the competitive ad landscape and ensure that their brand stands out from the crowd. And testing does not need to be done all at once. Some of our clients are using Link AI to new competitive copy when it appears to assess its likely effectiveness and guide their brand's best response.

Vera Sidlova

Global Director, Creative
Kantar

The future of generative AI in advertising: Efficiency without effectiveness?

Gen AI brings the potential to unleash creativity as well as create advertising content with unparalleled efficiency. However, the ultimate question marketers should keep asking is "How can generative AI help make my creative effective?".

With the onset of generative AI's potential to create ads at scale, is the industry in danger of creating ineffective content efficiently? Or can AI help find the ultimate marketing sweet spot where efficiency meets effectiveness?

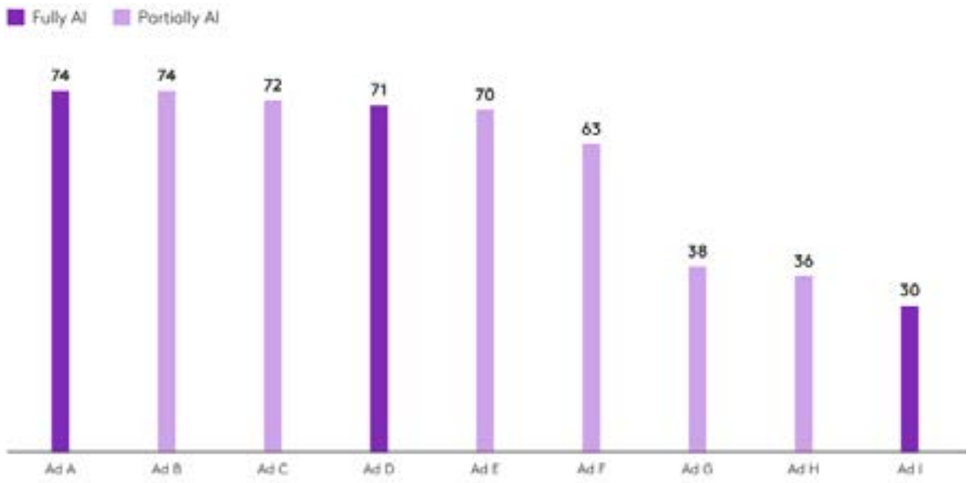
We wanted to explore how involving Gen AI in the creation process could potentially improve the effectiveness of digital advertising. We did this by testing some fully AI-generated ads, along with others where Gen AI played a partial role (i.e., writing the script or creating imagery), using Link AI for Digital – our AI powered ad-testing tool which uses data from 250,000 real-world ad tests to give indicative effectiveness results in as little as 15 minutes. In other words, we let our machines score the output of their fellow machines.

There are still relatively few ads created with at least some level of Gen AI involvement, so we selected nine ads to explore, from high production value ads such as Masterpiece for Coca-Cola, to experimental ones such as Pepperoni Hug Spot that many will remember by its infamous tagline, "Like family, but with more cheese."

Lesson 1: Gen AI ads performed strongly, but quality was variable

Kantar's Demand Power Contribution score in Link measures the long-term potential of an ad to drive meaningfulness, difference, and saliency for the brand. Of the nine ads we tested, six performed better than average by this metric and two of the three fully AI generated ads were in the top 30%. That said, there's a wide spread of results – with no particular pattern as to whether the ad was entirely or partially AI-generated.

Demand Power Contribution percentiles



Source: Kantar Link AI database

Lesson 2: There's more than one route to success

As with any new tool, the key to success is how you use it. As Brad Lightcap, the COO of OpenAI, said on stage at Cannes Lions "these tools still fundamentally need humans to be creative". Of the ads we tested, three stand out as good examples of the different approaches that can be taken to using AI. Pepperoni Hug Spot is a fully AI-generated ad for a hypothetical pizza chain that is a product of the creator's efforts to explore the world of AI-driven video. 'Masterpiece' for Coca-Cola features a human-created script showing the journey of a bottle of Coca-Cola from canvas to canvas in an art gallery, where AI brought these famous paintings alive. 'Driven by intuition' for Lexus has a story created by AI and brought to life by Oscar-winning director Kevin Macdonald.

Link AI for Digital predicted high brand-building potential for all three ads

	'Pepperoni Hug Spot' No real brand Visuals and script by AI	'Masterpiece' Coca-Cola Script by humans, with AI-aided visuals	'Driven by intuition' Lexus Script by AI, visuals by humans
			
Power	Top 30%	Top 30%	Top 30%
Impact	Top 30%	Top 30%	Top 30%
Skip Time (Desktop)	Top 5%	Top 10%	Top 35%
Skip Time (Mobile)	Top 5%	Top 10%	Top 35%

Source: Kantar Link AI database

Attention is also a crucial element, especially in digital advertising where consumers are overloaded by stimuli. We know that higher attention measured by eye gaze results in stronger brand endorsement.

Masterpiece for Coca-Cola, for instance, not only is good at keeping the viewer watching but it also uses this time wisely. The product, hence, the brand is the hero of the story where it continuously attracts the viewer's attention, measured by AI-based, predictive eye tracking.

Watch on YouTube

Lesson 3: AI can assess different creative routes and variants as well as generate content

As the processes become more efficient, being able to execute more creative routes at scale will be also more feasible. However, brands cannot always afford to spend the time they gained during execution on deciding which route has more potential. This is where AI can again play a significant role, in testing, helping to select the most effective creative route.

Among the ads we tested, two were for the same brand, from the same campaign, and both fully AI-generated. We tested both routes in context for Facebook, and the results highlight how AI-powered ad testing could quickly help marketers select the route with more potential for certain online platforms. Our Link AI for Digital solution found that one of the ads carries better potential than the other in terms of enjoyment, persuasion and interaction – it's easy to see how this could save time and budget in a real-world setting.

Source: Kantar Link AI database

Link AI can not only be used to test different creative routes, but you can use it to ensure that the creative is tailored to the channel. Considering the budget and time pressures around digital campaigns, AI can again prove to be a great ally in asset creation here, making it possible for agencies to explore and produce different versions of the same creative execution at speed and at scale.

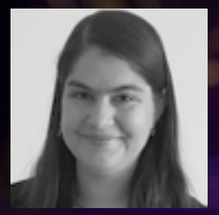
AI as a partner in shaping creativity

The common consensus on the use of AI in advertising is that we need to have humans at the centre of the creative process. And it's not hard to see why. It is not a thought partner in creation but rather a helping partner that allows agencies and marketers to explore new ways to be creative and impact.

We are also currently exploring the opportunities that generative AI technologies offer for enhancing the creative development process. We are looking into new ways of bringing our advertising optimisation recommendations to life, and helping our clients and their agencies rapidly shape and iterate their creative to develop the most effective version of each ad.

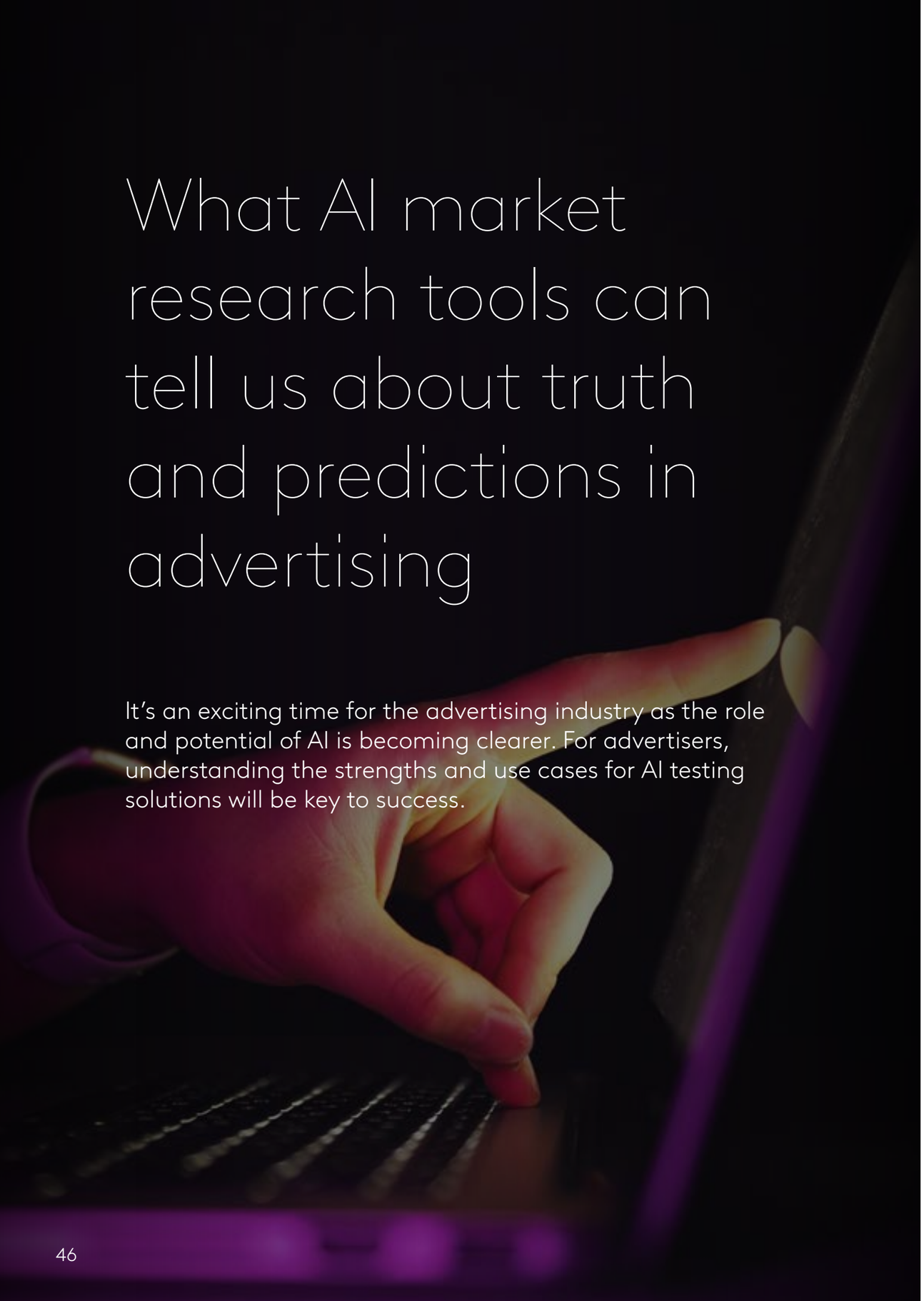
Finally, a word of warning, producing content more easily may also bring the temptation to produce high quantities of content, and marketers will need to keep their eye on quality. Producing a lot more advertising could also mean running the risk of just adding to clutter and not delivering on business objectives. With the arrival of AI, marketers need to remember that efficiency should never be at the expense of effectiveness.

Ecem Erdem
Global Manager
Creative
Kantar



Vera Sidlova
Global Director
Creative
Kantar

What AI market research tools can tell us about truth and predictions in advertising



It's an exciting time for the advertising industry as the role and potential of AI is becoming clearer. For advertisers, understanding the strengths and use cases for AI testing solutions will be key to success.

Artificial intelligence (AI) ad testing solutions are attracting more attention, and budget, than ever before. Our research tells us that 49% of global marketers plan to spend more on AI creative testing next year. And with good reason; promising quick answers and lower costs than survey-based approaches, the potential to test more content more quickly has clear appeal. But where should AI solutions sit alongside survey-based testing? What are the strengths and advantages of each? And when should you use one or the other? These are questions marketers need to grapple with, to ensure that the right product is being used in each situation and, ultimately, to get the best return on ad spend.

Creative quality is vital to the success of ad campaigns – probably more so than you think. Kantar data shows that creative quality is the second most important factor in profitable advertising, whereas marketers think it's the fourth most important. We also know that great creative drives both brand equity and sales. So the right creative approach, coupled with getting the executional details right, add up to memorable elements that form the basis of winning campaigns.

AI tools can augment the creative testing fundamentals

From establishing your strategy and kicking off ideation, through to executing your campaign and optimising in-flight, getting creative right is a journey, with testing and learning involved at every stage. This process can take months or days depending on whether it's a new landmark campaign being devised or changing assets in a digital campaign. But the fundamental process remains the same.

Add into the mix that things are constantly changing, meaning that staying still isn't an option. There are new platforms emerging all the time, and new digital formats to explore. We have heard so much this year about the potential of the metaverse, with some brands blazing a trail in finding a role that they can play in these virtual worlds. This is something we expect to see more brands exploring in 2022 and beyond.

Additionally, even traditionally offline channels are moving online with the unstoppable rise of VOD viewing, programmatic audio, and innovation within digital out of home (DOOH). In DOOH, we are seeing brands get really creative, using dynamic creative approaches which change according to the weather conditions, time of day, traffic levels or location, as well as advanced screen technologies, to deliver really engaging experiences. All of which require insight at each stage to understand where the creative is delivering or could be improved further.

AI allows for more iterative testing throughout the campaign lifecycle

With all of this change, marketers and agencies need to constantly test and learn, and each business and campaign will require a framework to support it. Part of that framework is an understanding of what is the right testing approach for each stage of a campaign.

At Kantar, we see the role of AI-powered creative testing as a predictive tool. It can give you a go/no go result on a creative approach and the lower costs open up the possibility of testing competitors' advertising – something that has largely been cost-prohibitive before now. We see this as a primary use case for AI solutions. But crucial to the output of any AI tool is the data which feeds it, and the assumptions going into generating those speedy indicative results.

AI and survey-based ad testing work hand in hand

But it's not all about AI. The advances in AI simply reinforce why and when marketers should use survey-based testing. That will always be needed to form the foundational data which the AI tool can draw on for relevant insights for the task at hand, whether that's looking at new creative routes or an entire launch campaign. This foundational data is crucial, because an AI tool is only as good as the data sitting behind it. Here's where scale matters, and quality. The data fed into Kantar's AI tools comes from a database of 250,000 real-world ad tests.

When launching a new campaign, whether in TV or digital, granular insights are important because the details matter.

At Kantar we recommend testing a TV execution three times, whether it's for a new product, a new campaign, or a new creative theme, or even a cut-down: first of all, at an early stage, then again after some key edits and tweaks based on the findings, and finally at near-final stage, to refine. This means you're maximising your chances of success and you can only get this granular understanding and optimisation, second by second, from survey-based pre-testing, as well as insight into key themes, and deep dives into specific requirements such as celebrity usage, music, I&D, and so on.

To facilitate – and accelerate – more iterative testing, we recently launched Link AI on Kantar Marketplace, which offers creative effectiveness predictions for digital video ads in as few as 15 minutes, assessing against the behavioural and creative metrics that drive ad performance. It gives marketers the ability to predict the performance of digital advertising before it goes to into the market, evaluate different versions of an ad, test competitors' creative and test high volumes of ads to identify trends and build creative benchmarks. Link AI for Digital is part of a suite of AI-based capabilities on Kantar Marketplace, which also includes Link AI for TV. Clients like Google and Unilever already using these tools to predict how audiences will respond to their ads.

The future that we see is not one where AI supersedes survey-based testing. We see them both working together, in packages, for specific use cases. This hybrid approach will enable suitable pre-testing frameworks for any client who wants to maximise the return on their creative.

Jane Ostler

EVP Global
Thought Leadership
Kantar

What Large Language Models could mean for market research

Siri on steroids or the future of the industry? We discuss the potential applications and limitations of Large Language Models.

Unless like Jared Leto, you were at a silent retreat and emerged not realising there was a global pandemic, you will be aware that ChatGPT, Bard and all their cousins are the centre of attention right now. Even Bill Gates has declared that 'the age of AI has begun'.

But before diving into all the possible radical applications of the technology for the market research industry, let's start at the beginning: What are Large Language Models?

Simply put, Large Language Models (LLMs) are designed to predict the next word or phrase in a sequence. And with lots of exposure to large datasets, these models can learn statistical relationships between words through their co-occurrences. As an example:

What type of milk would you like in your coffee? We have oat, almond, soy and cow.

I just fancied a nice cup of milky coffee.

The words milk and coffee are deemed to be semantically related because they tend to be neighbours. This 'understanding' of relationships at a massive scale allows the models to solve tasks at a seemingly surreal level of proficiency – while dropping jaws and prompting non-stop hype about industry disruption on LinkedIn.

However fascinating, this is not really understanding; it's statistical association. LLMs are not yet sentient beings, and we have not yet arrived at Artificial General Intelligence – the time when a machine will be able to understand or learn intellectual tasks as a human would.

So what are the potential use cases for the market research industry?

There are many exciting and progressive use cases for the market research industry, some of which we already use, and others that we are actively exploring at Kantar. Here are just a few examples:

Summarisation: market research collects a lot of data in the form of words – survey verbatims, qualitative interviews, and focus groups. LLMs could summarise, order and prioritise responses expediting the work of the researcher when creating a narrative for the client.

Automated reporting: market research also produces large volumes of quantitative data that need sorting, summarising, and presenting. LLMs could quickly organise and create draft headlines based on charts, tables, models, as well as executive summaries.

Topic/theme identification: using different attitudinal datasets or open APIs to digital platforms, LLMs could identify themes, assess sentiment, affinity and brand perceptions for the researcher to refine.

Prediction: LLMs could extract embeddings (mathematical representations) that other machine learning models can use to predict some outcome of interest. For instance, does the dialogue in a TV ad help predict its performance? How can we relate people's qualitative experience interacting with a service representative to their brand loyalty or churn?

Intelligent interviewing: already in use by the industry, conversational AI will come on in leaps and bounds, responding to previous answers and routing questions accordingly. And designing quant questionnaires will never be the same again, the machine can help with automating and standardising the process!

Text data cleaning: cleaning is a large part of the operational process – LLMs could check for gibberish and spelling errors, much better than autocorrect ever did!

Creative writing: this could be anything from creating discussion guides, initial drafts of presentations, marketing copy, and concept statements to [insert your wild idea here].

Conversational search queries: think of 'an intelligent agent' that sits on top of data platforms you can query in natural human language. The agent then analyses potentially massive databases 'underneath' and fetches back the results in natural language. Siri on steroids!

So what are the risks of LLMs?

There are quite a few known risks that we see in the market research industry. One is that the model starts making things up or 'hallucinating'. We've seen this with time series examples where the previous version of ChatGPT gave wrong answers because it was only updated to 2021. LLMs also have no 'knowledge of knowledge', so there's no such thing as a confidence level. LLMs have no notion of time or temporality, or maths, which is rule-based, so they are currently limited in their interpretation of data to what they can discern through generic correlations or associations.

And there are also obvious legal and ethical issues that arise. Intellectual property, for example: is this a creative act by the LLM, or is it re-hashing someone else's IP? Does sharing your own data on the open web mean you give permission for it to be used by LLMs?

And finally, the quality of the datasets the models use could easily reinforce biases and stereotypes without 'knowing'.

Our conclusion

Large Language Models offer immense potential to the market research industry. They could disrupt roles and responsibilities while speeding up some processes, enhancing others, and creating new opportunities. But market research and data organisations will need to be assured of their position on the risks before commissioning large-scale projects.

We predict there will be three types of use cases for LLMs in market research:

1. To make some things more efficient: for example, no more manual coding of open ends.
2. To do some things better: for example, the ability to process a million tweets, extract emotions and predict, for example, churn - a human can't do that.
3. Create new opportunities: for example, ask a machine to create 10 versions of a concept, use another machine to evaluate each, and pick the best.

At Kantar, we have a rich history of using language models over the past 10 years across our entire business, and more generally using Machine Learning and AI to enhance many of our products and solutions, including our ad screening solution Link AI. Link AI has a solid foundation of training data of more than 250,000 ads tested with humans. We are also running workstream pilots across new use cases using the latest generative AI models and exploring scalable LLM opportunities with partners. Exciting times.

A brief history of language models (Sorry, Hawking!)

We know you know, but in case you don't really know, parameters are the 'moving parts' inside a model – the more parameters a model has the more complex and the more data it requires. But how much? That has changed exponentially in the last decade and will change again. You have our word!

Baby steps or phase 1 (circa 2013) – Word embeddings emerge. Machines could now, for the first time, represent each word in the English language as a collection of numbers! And these numbers appeared to capture 'meaning' – the machine would give a similar embedding for the words 'king' and 'queen', for example, that would be distinct from the embedding from the word 'bank'. The early word embeddings relied on simple model architectures with a relatively modest number of 'parameters' in the region of 30 million to 100 million. While these required further modelling and tuning for use on specific tasks, they revolutionised the field of Text Analytics.

It's all about context or phase 2 (2014 – 2018) A problem with early word embeddings was that they represent words without considering 'context' – the same word can have different meanings depending on the other words in the sentence. Contextual embeddings appear in the scene circa 2018 and can process large strings of text as sequences of words. These models use a larger range of parameters between 100 million and 300 million – and you guessed it, these still require some fine-tuning before they can be used on specifics.

Ready to rock or phase 3 – Today, we see Large Foundation Models trained on huge datasets at scale – including GPT-4, ChatGPT, Bard and their future cousins – operating on over 175 billion parameters. And yes, this is the real deal! All these models are 'plug and play'; they don't need much or any additional training to perform specific tasks.

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BRANDDIGITAL

Stay on top of disruptors and expand your market view

Powered by our proprietary AI toolkit deployed on digital search data, **Kantar BrandDigital** enables marketers to understand market share potential and consumer interest for new and emerging brands. Spontaneous consumer digital search provides a valuable source for understanding what is perking interest in brands – from campaigns to specific themes in the product offering to customer experience elements.

Kantar BrandDigital is the solution for:

— Tracking rising or declining interest in category disruptors to devise mitigating strategies or explore M&A options

— Understanding what drives these disruptive brands, what is perking interest in them - from customer experiences, product features to activation and more

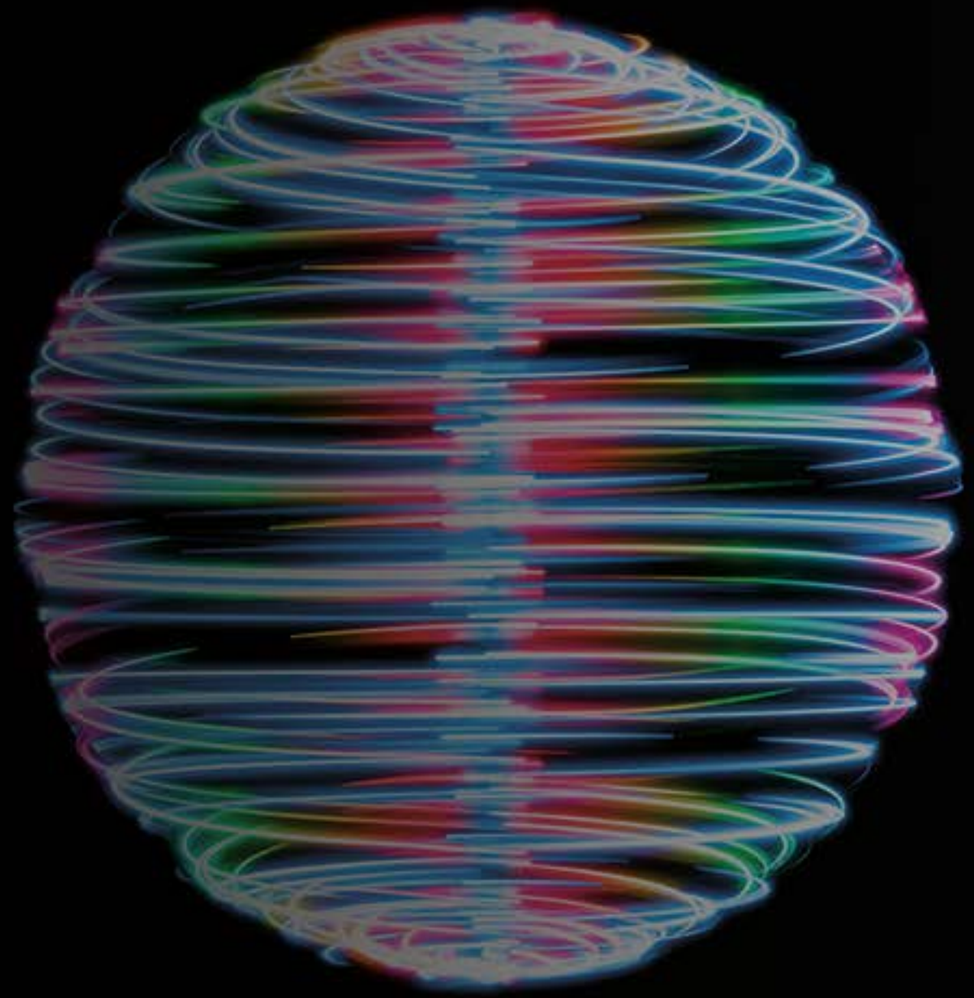
— Getting a deeper and more granular understanding at regional levels – see where the trends are concentrated.

— Accessing a global digital population of 4.3 billion, with no limitations on geographies or languages

— Utilising machine-led, human-refined data collection and analytics automated for speed and scale.

Kantar's Brand Guidance solutions bring you excellence in brand expertise, analytics, and technology.

Find out more



Understand what grows brands in the long-term and drives sales in the short-term

Using Kantar's holistic approach to Unified Marketing Measurement and Optimisation (UMMO), you can achieve higher marketing ROI, a 10x-20x return on your investments, and sync with your marketing effectiveness journey and decision needs. **Learn more about UMMO**

20% increase in ROI due to optimised media mix

42% increase in profit

17% sales increase in just 6 months (recent clients have seen this)

Reduction in annual churn by 9.2% across entire product portfolio

Digital (Dx) Analytics

Detect new trends early and optimise products and positioning to maximise your growth opportunities

With cutting-edge digital analytics, we help brands to use digital data to uncover what others cannot. We look in the right place, at the right time, with the right human and artificial intelligence – to help with product development, detecting consumer needs and forecasting trends.

Spotlight on Finding the Future

Leverage the most meaningful search and social data to better understand trends everywhere, anywhere, with speed and at scale. Unlock the power of digital data amplified by tech to shape the brands of tomorrow through Kantar's Dx Analytics.

Contact us for the latest reports on Finding the Future of:

— Fashion - coming October
— Tech-Enabled Life
— Food and Beverages
— Sustainability
— Financial Services
— Beauty and Cosmetics

LINK+ is the most powerful way to make creative work.

Discover the most flexible ad testing solution on the market that can quickly help you develop and deliver the most impactful creative to increase your sales and build brand value. Available exclusively on Kantar Marketplace, LINK+ integrates Kantar's market-leading ad testing capabilities into one solution to help drive greater campaign impact. LINK+ joins Link AI and BrandNow as part of a new generation of AI-enabled products addressing the increasing demands placed on marketers. **Find out more**

Storyboard
Get early input to inform creative development for digital, TV and cinema ads.

Digital
See if your online ads are strong enough to cut through on YouTube, Facebook, Instagram, Twitter, TikTok, Youku and out of context.

TV
Measure and improve the strength of your television and video subscription services ads.

Static
Evaluate and optimise your print, out-of-home and point-of-sale creative.

Spotlight on LinkAI

Using AI and machine learning, LinkAI tests creative assets quickly, iteratively and at scale, decreasing time to market and increasing ROI. LinkAI on Kantar Marketplace is the fastest, fully automated, AI-powered solution to guide creative and media optimisation.
It is built on a database of over 250,000 ads and 35 million human interactions.

About Kantar

Kantar is the world's leading marketing data and analytics company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks and our innovative analytics and technology, we help our clients understand people and inspire growth.

www.kantar.com/campaigns/APAC