

The KANTAR logo is positioned in the top left corner. It features the word "KANTAR" in a bold, black, sans-serif font. The letter "K" is uniquely styled with a vertical yellow bar on its left side. The background of the slide is white with abstract, flowing, translucent purple and blue lines that create a sense of movement and depth.

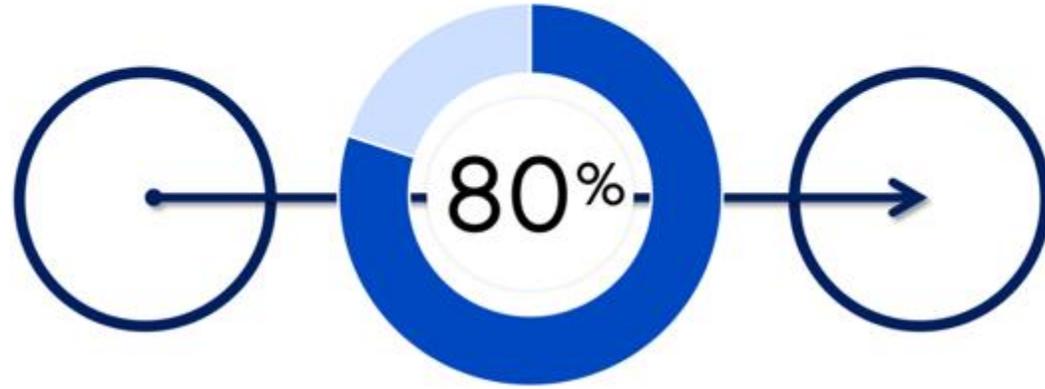
# Thriving in Turbulence

## 10 for the Next 10

J. Walker Smith  
Knowledge Lead

# Change

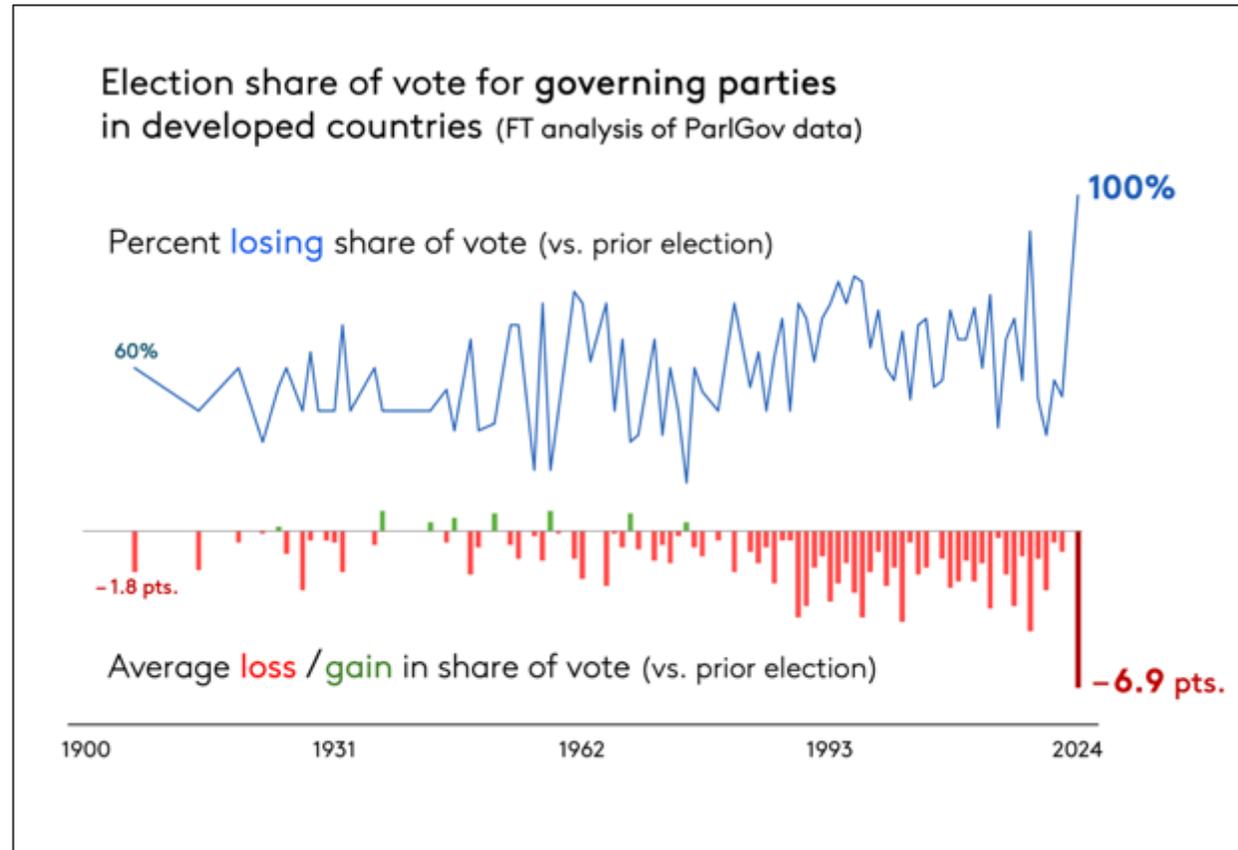
Ready for  
change



The pandemic has shown  
me that there are better  
alternatives to the old  
way of doing things.

# Change

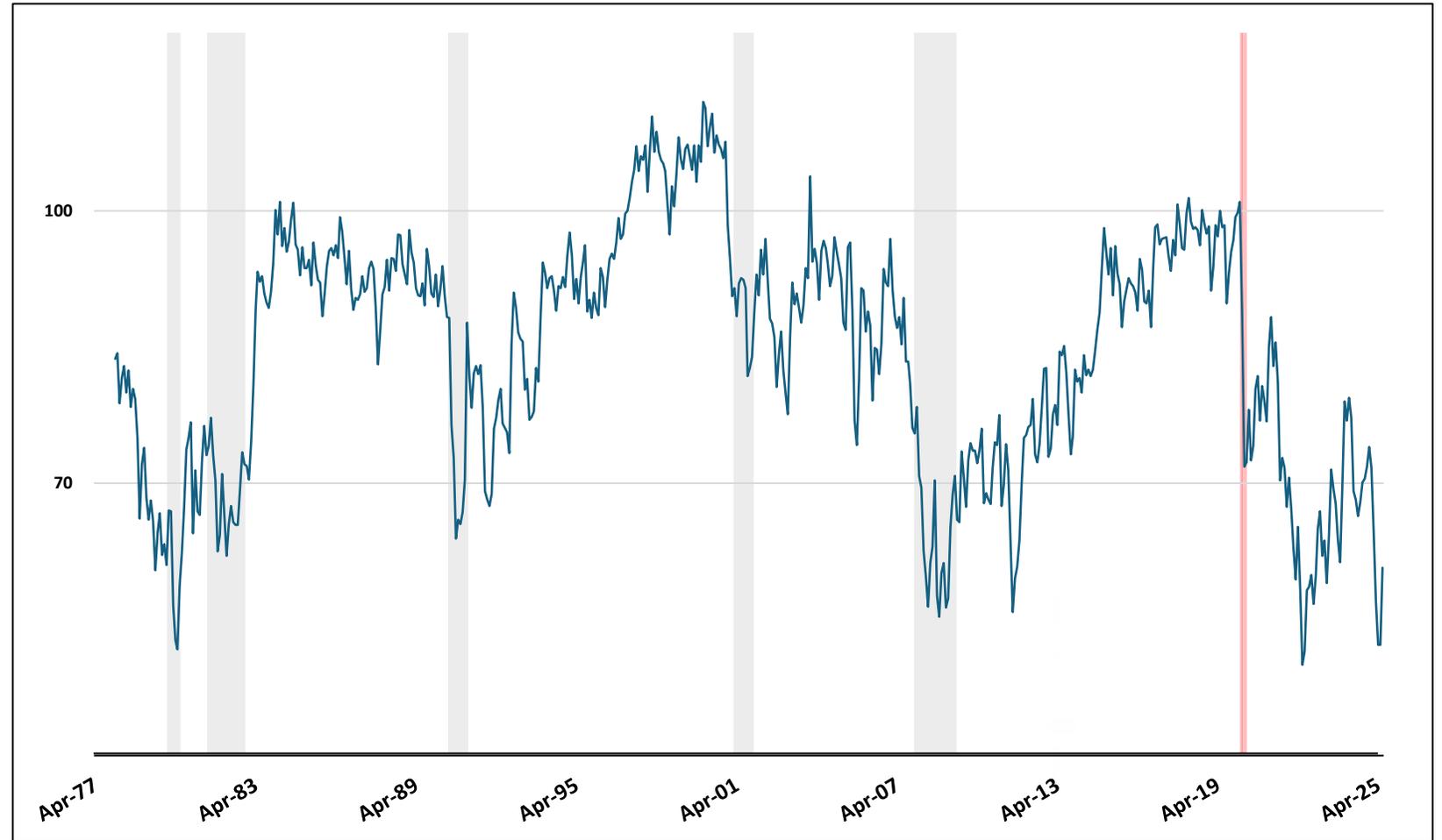
Ready for  
change



# Change

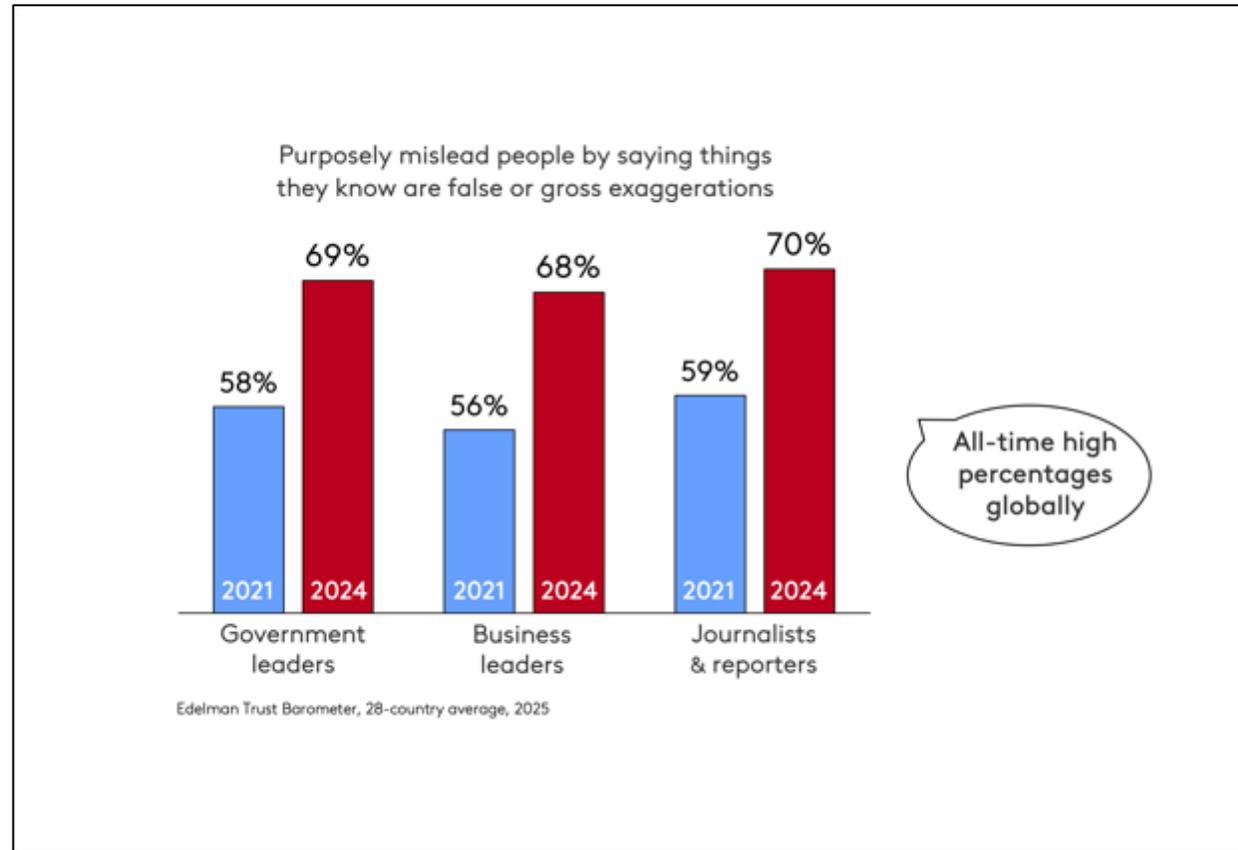
—  
Reacting to  
change

Consumer Sentiment (University of Michigan, monthly)



# Change

No credibility





# Change



5 things that  
will change  
brands

5 things that  
brands can  
change

# Change

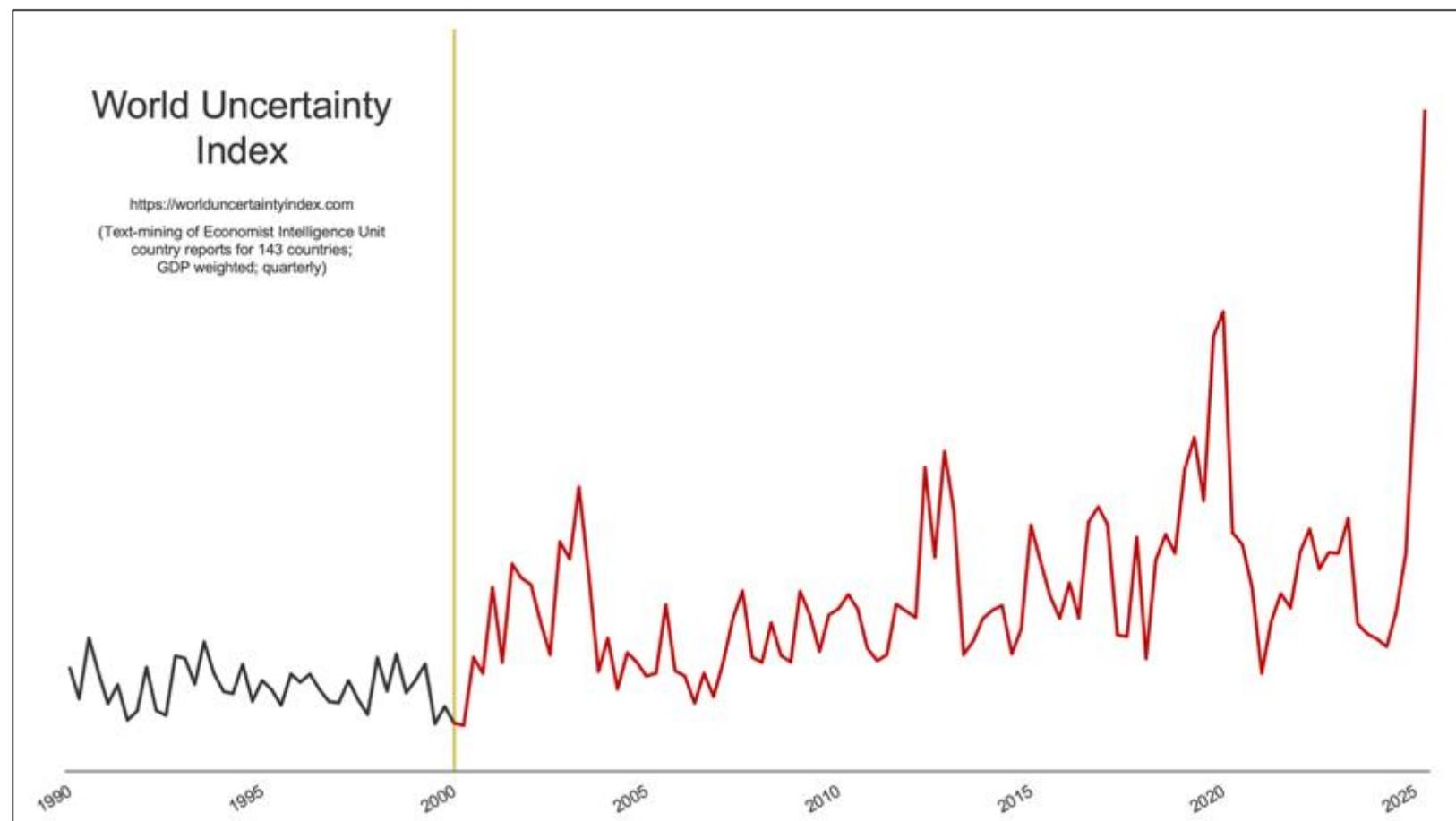


5 things that  
will change  
brands

5 things that  
brands can  
change

# 1

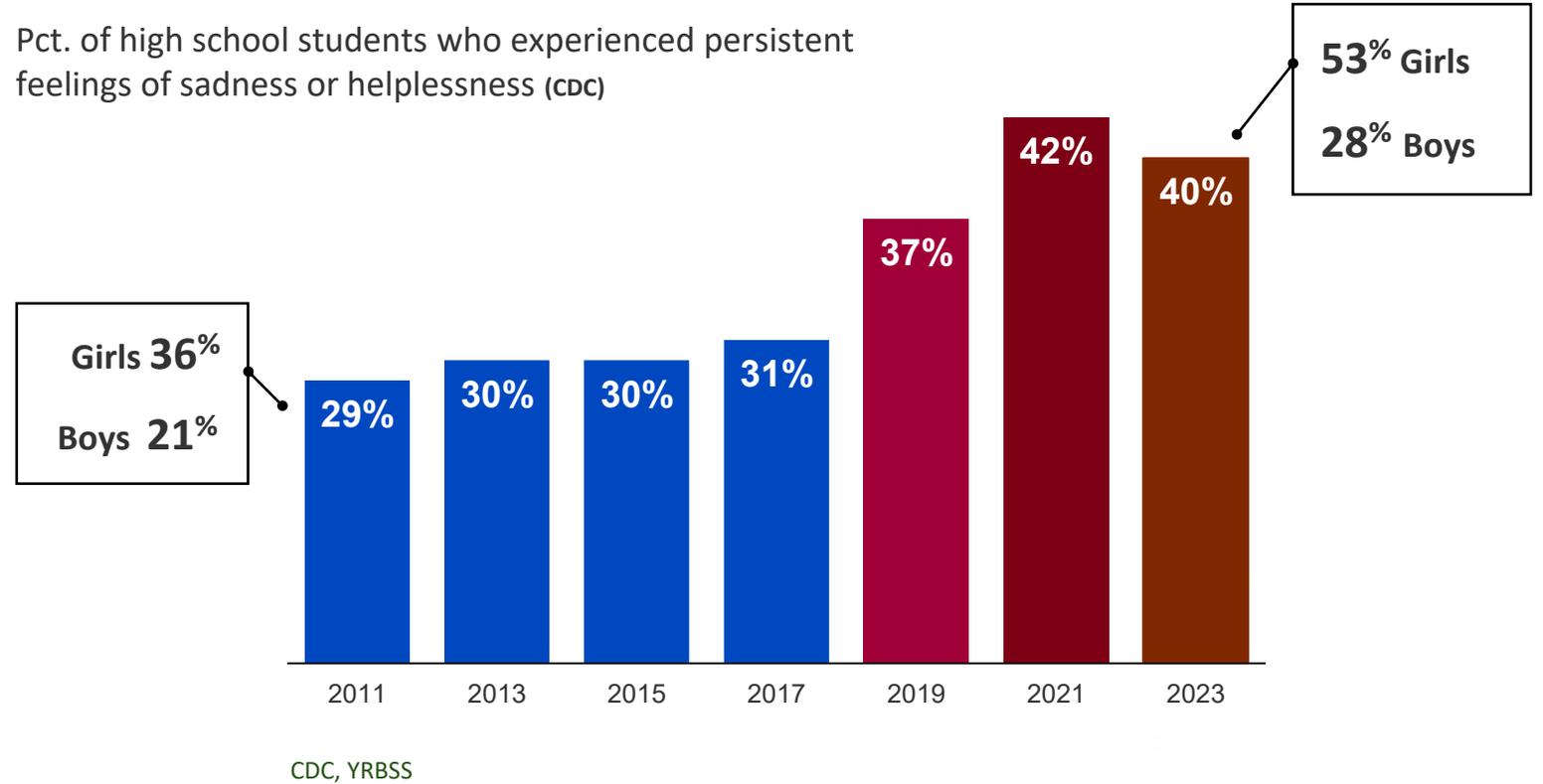
## Volatility



# Gen Z

## Anxiety

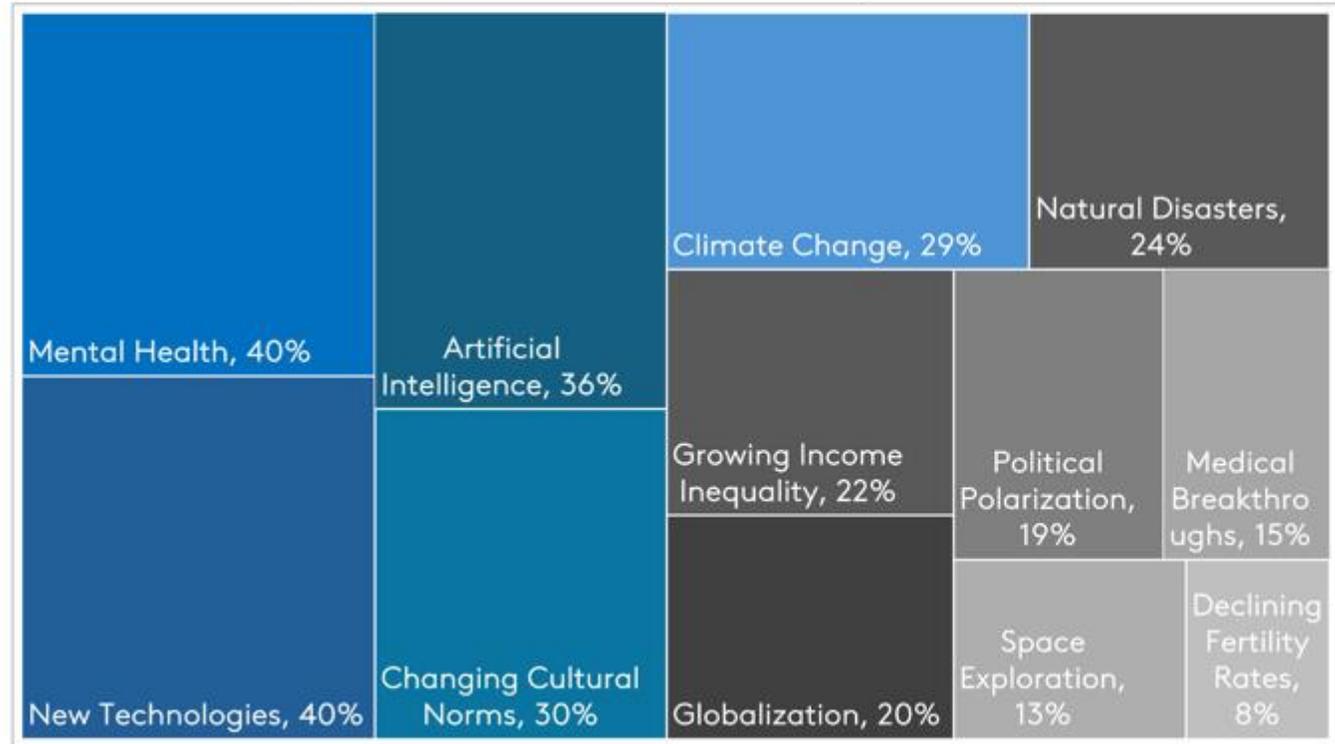
Pct. of high school students who experienced persistent feelings of sadness or helplessness (CDC)



# Gen Z

## Worldview

### Among Gen Z: What will shape worldview?

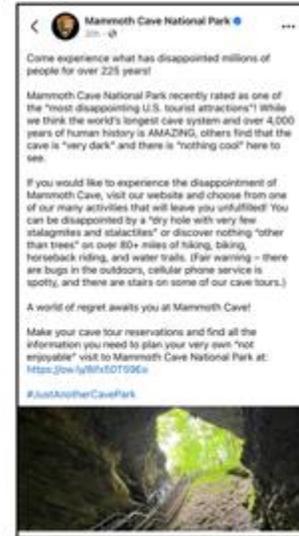
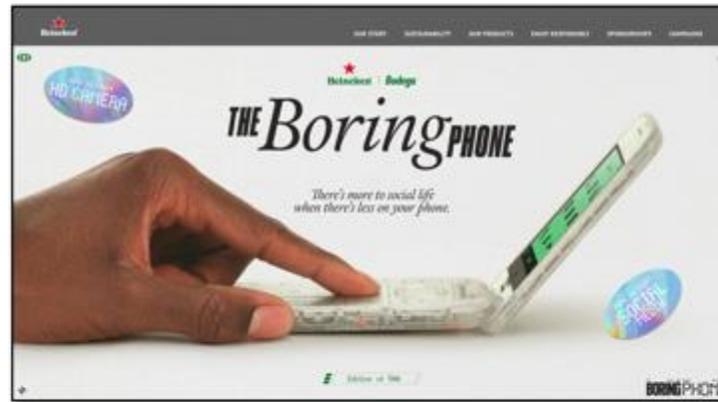


(U.S. MONITOR; percent citing as one of top three things)



# Boring

Be a brand



# Boring

It just works



# Equanimity

Mood to order



**01** Mood-Boosting Water  
U.S.



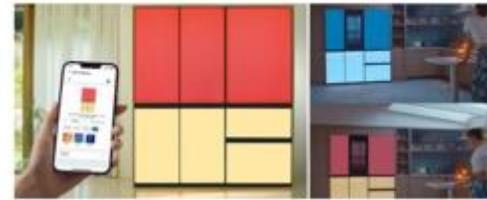
**02** Mood Pills  
India



**03** Psilocybin Chocolate  
Canada



**04** Mood-Proven Paint Colors  
Indonesia



**05** Mood-Lifting Refrigeration  
Global



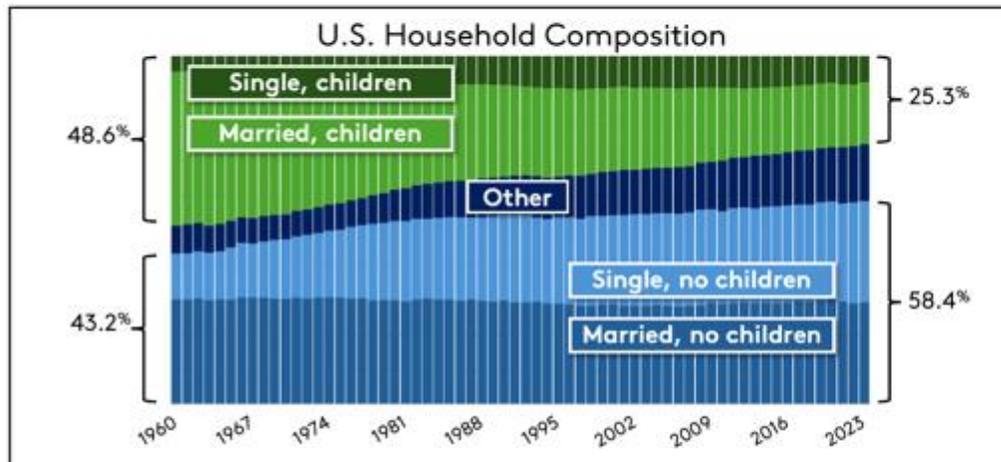
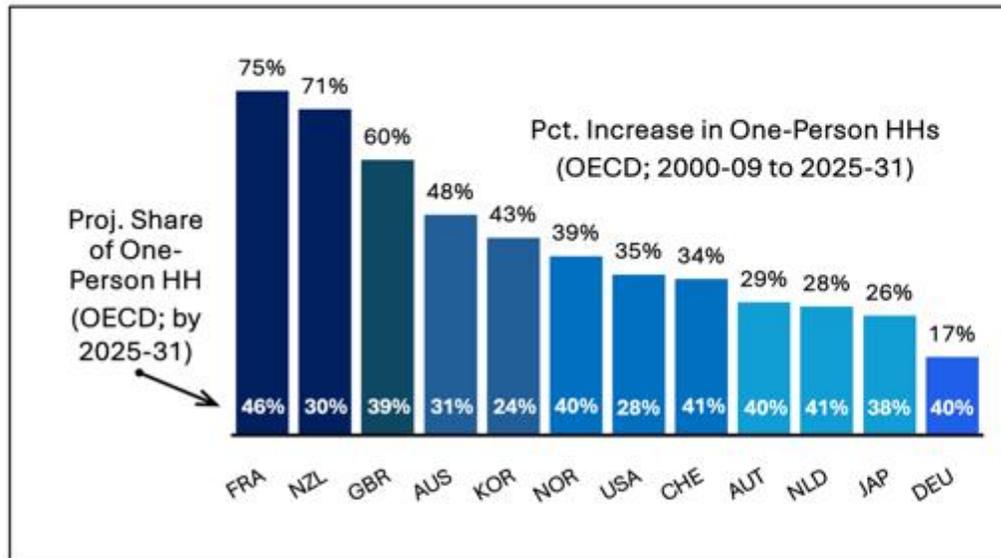
**06** Mobile Moods  
Global



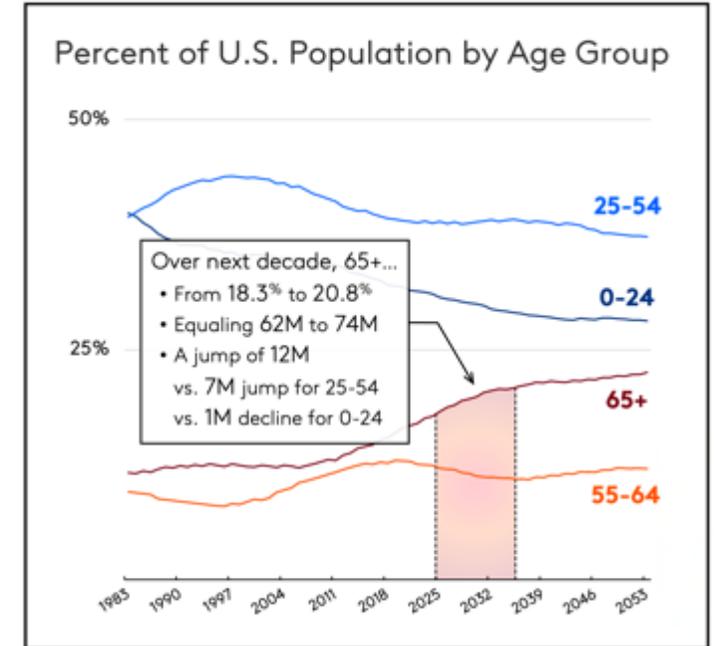
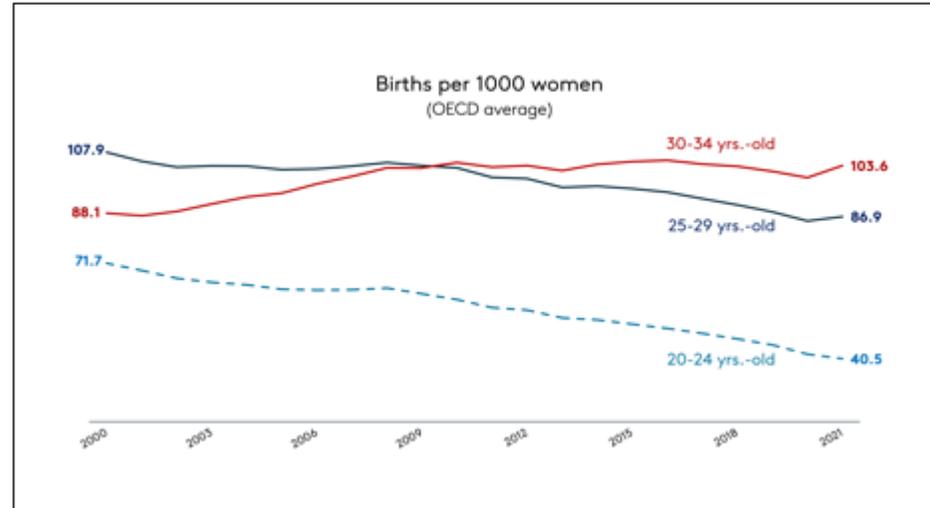
**07** The Good Patch  
U.S. / Global

# 2

## Smaller HH

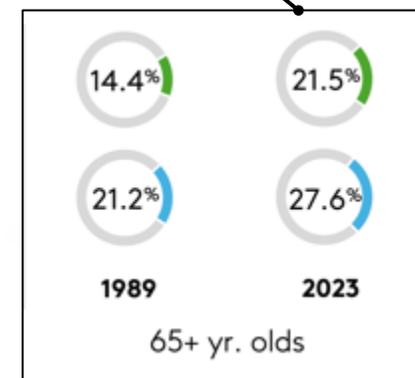
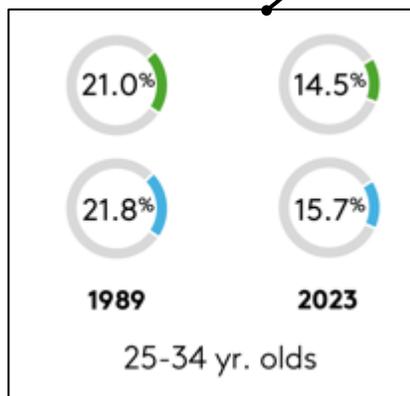
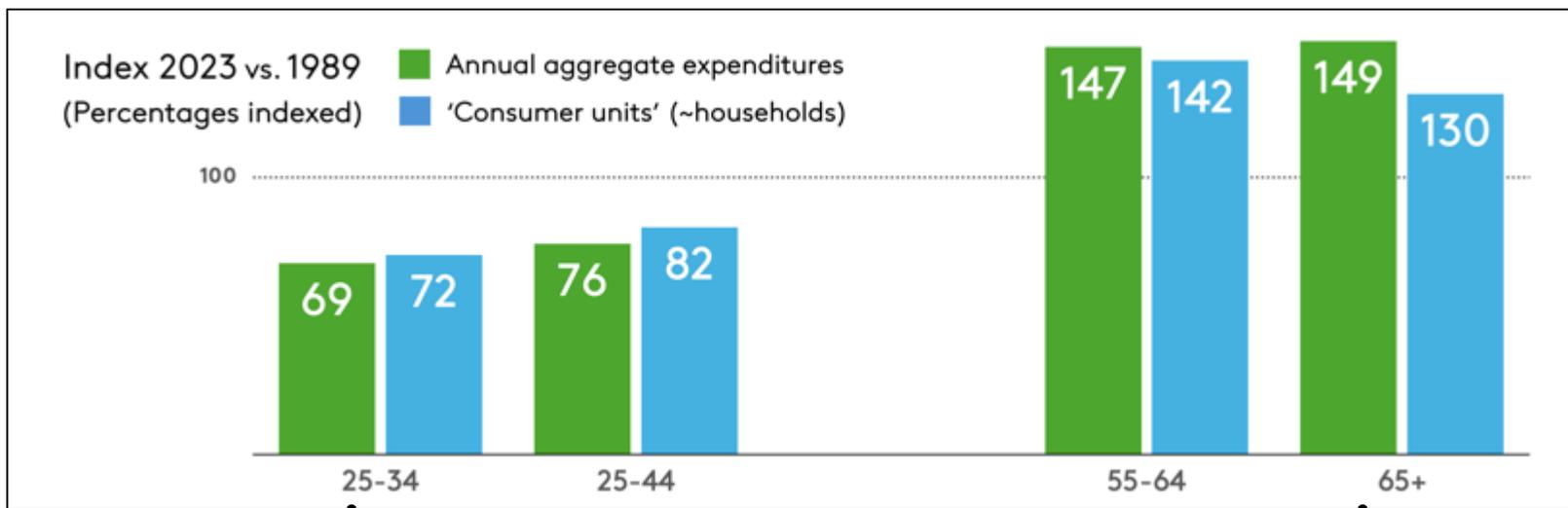


# 3 Older



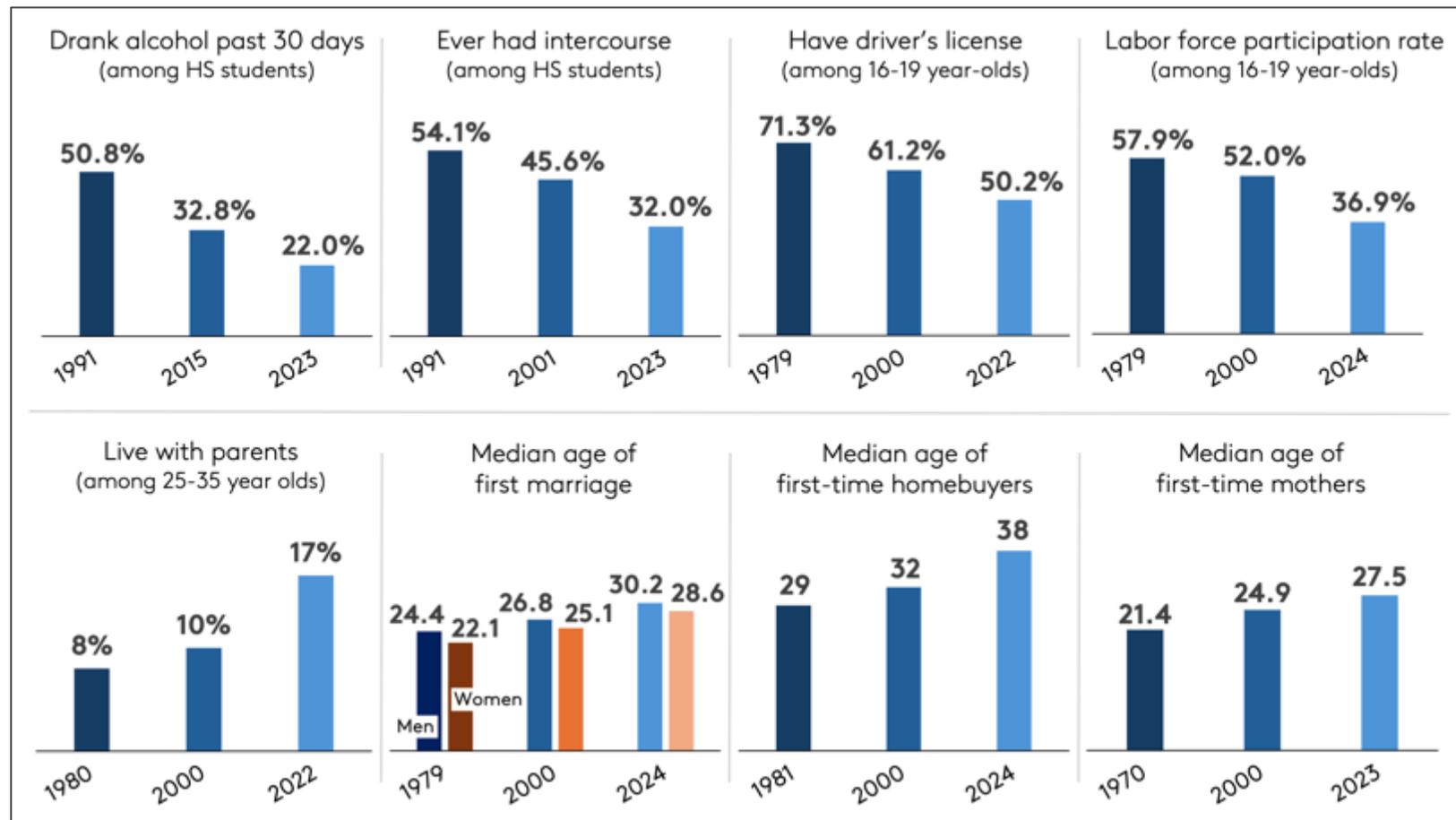
# Aging

## Dollar Shift



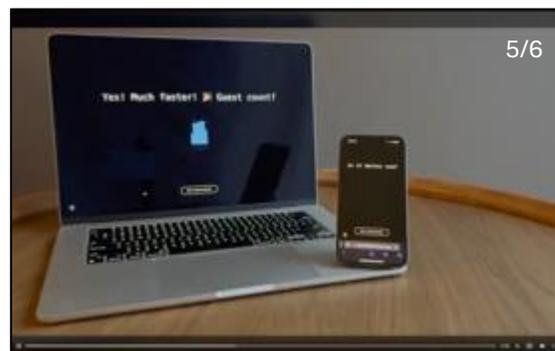
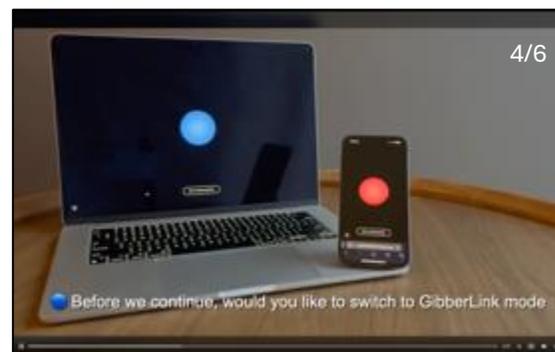
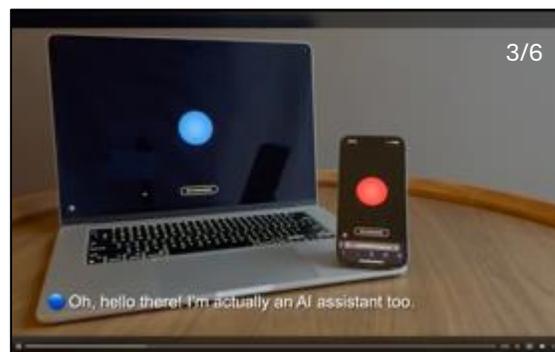
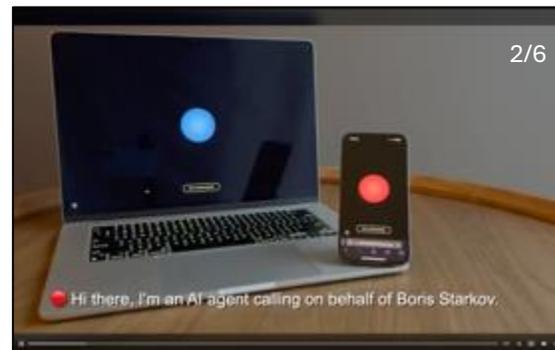
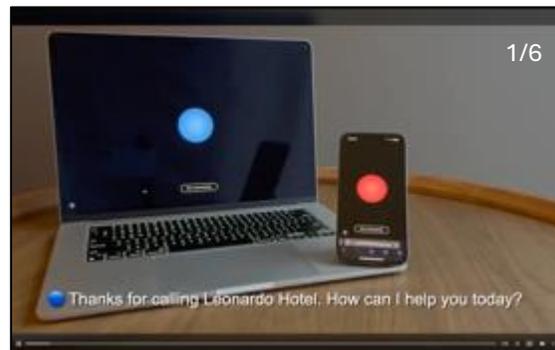
# 4

## Later adulthood



# 3

## Advertising to Algorithms



First Place  
ElevenLabs  
Hackathon  
February 2025



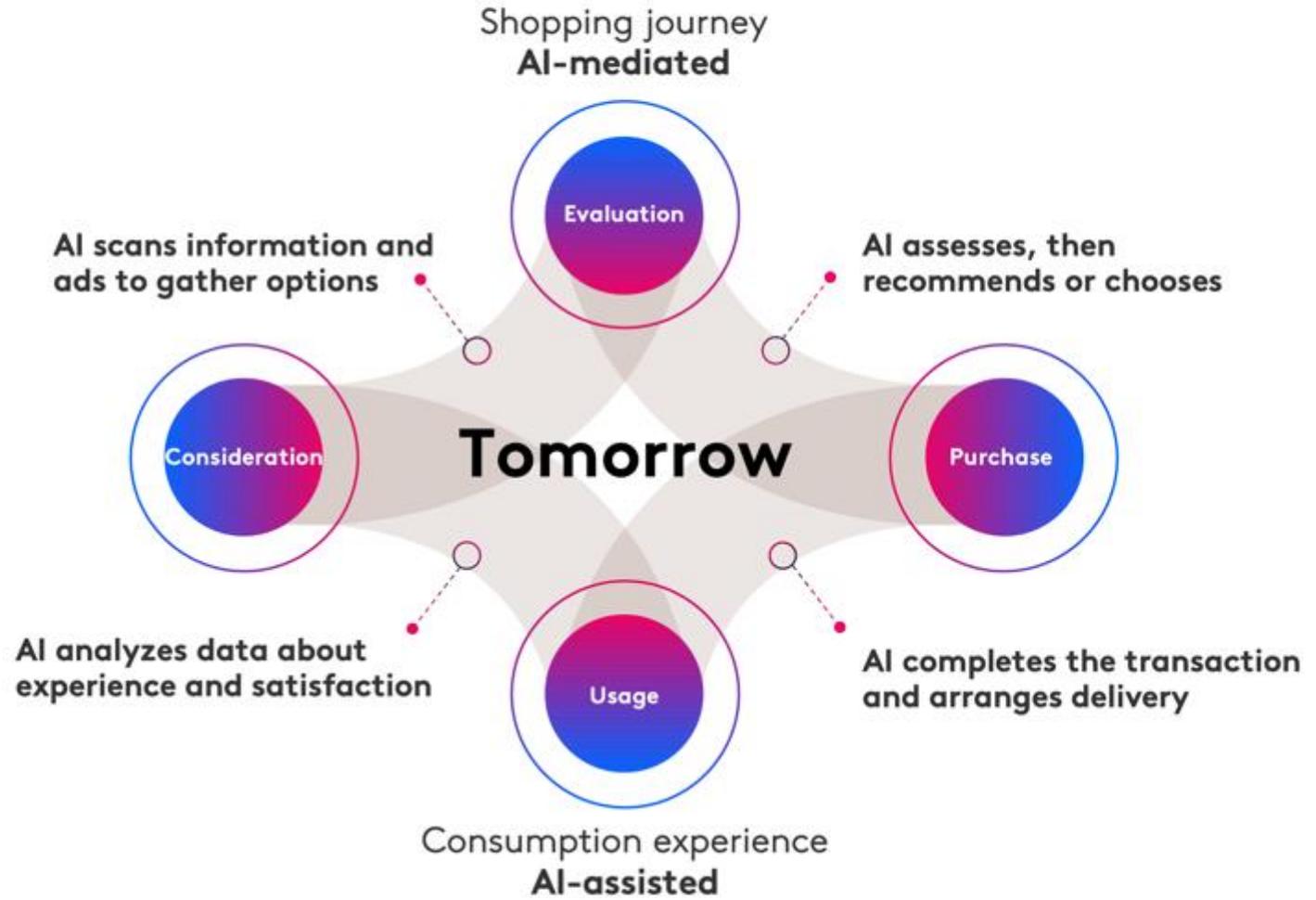
# Human

—  
People do it



# Human+

AI does it



AX

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Tomorrow's  
customer

THE WALL STREET JOURNAL.

CIO JOURNAL

## Walmart Is Preparing to Welcome Its Next Customer: The AI Shopping Agent

As consumers begin to use AI agents to do their shopping, retailers are trying to figure out how to market to bots in addition to humans

By [Isabelle Bousquette](#) [Follow](#)  
Updated May 15, 2025 8:01 am ET

[Share](#) [Bookmark](#) [AA](#) [Gift unlocked article](#) [Listen \(5 min\)](#)



Walmart's Cyber Monday display in December. Would it appeal to AI bots? PHOTO: ALLISON DINNEN/SHUTTERSTOCK

AX

AI apps

### In-store retail media shopping cart



### Yuka app brand score

**Hydration Multiplier Tropical Punch**  
Liquid I.V.

**20/100**  
Bad

**Negatives** per serving (16 fl oz) ...

- Additives** Contains additives to avoid 8

**Positives** per serving (16 fl oz) ...

- Saturated fat** No saturated fat 0g
- Calories** Low impact 45 Cal
- Sugar** Low impact 11g
- Sodium** Low impact 500mg

**Recommendations** [See all](#)

**Hydrate + Multivitamin Electrolyte Drink Mix**

History Recs Scan Top Search

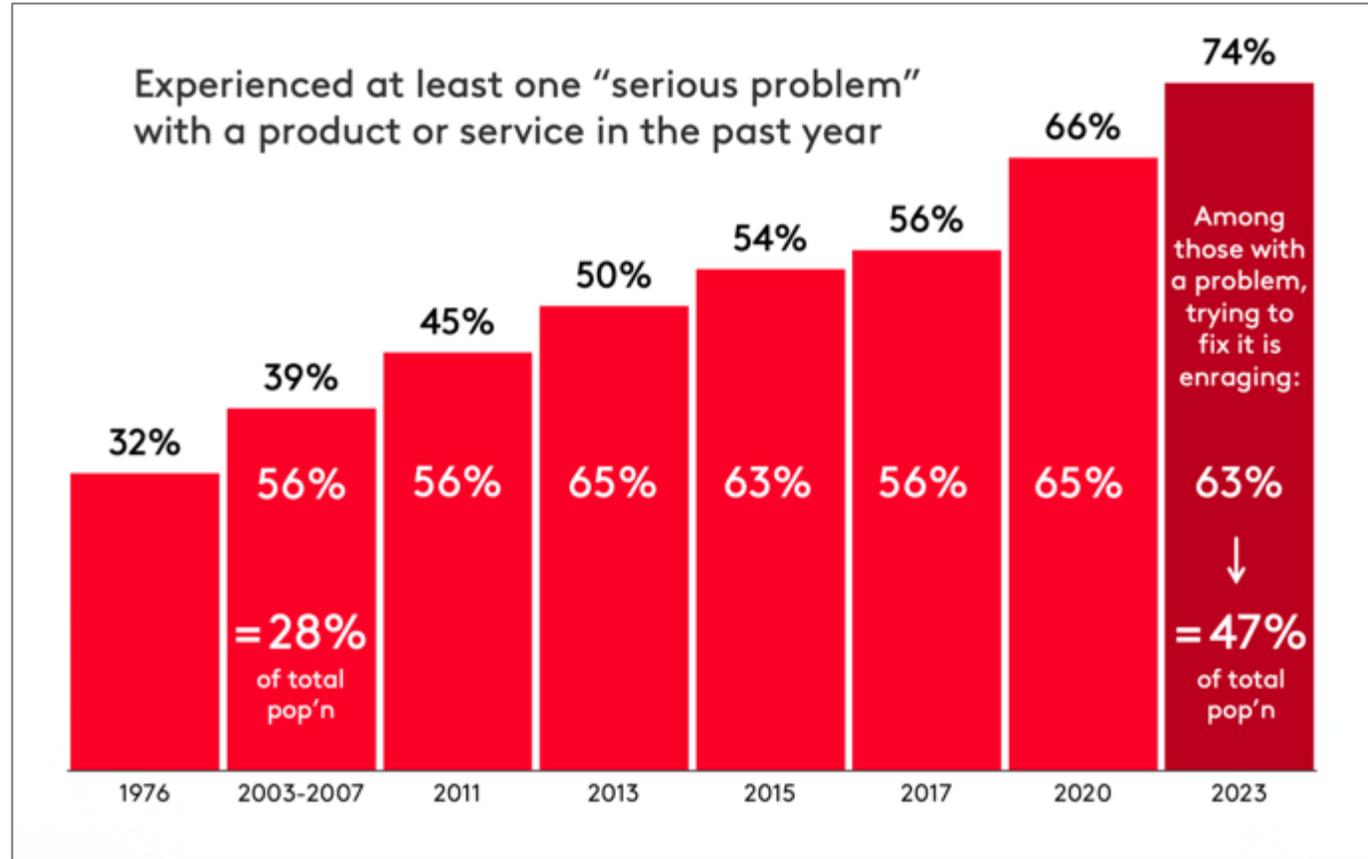
# Change



5 things that  
will change  
brands

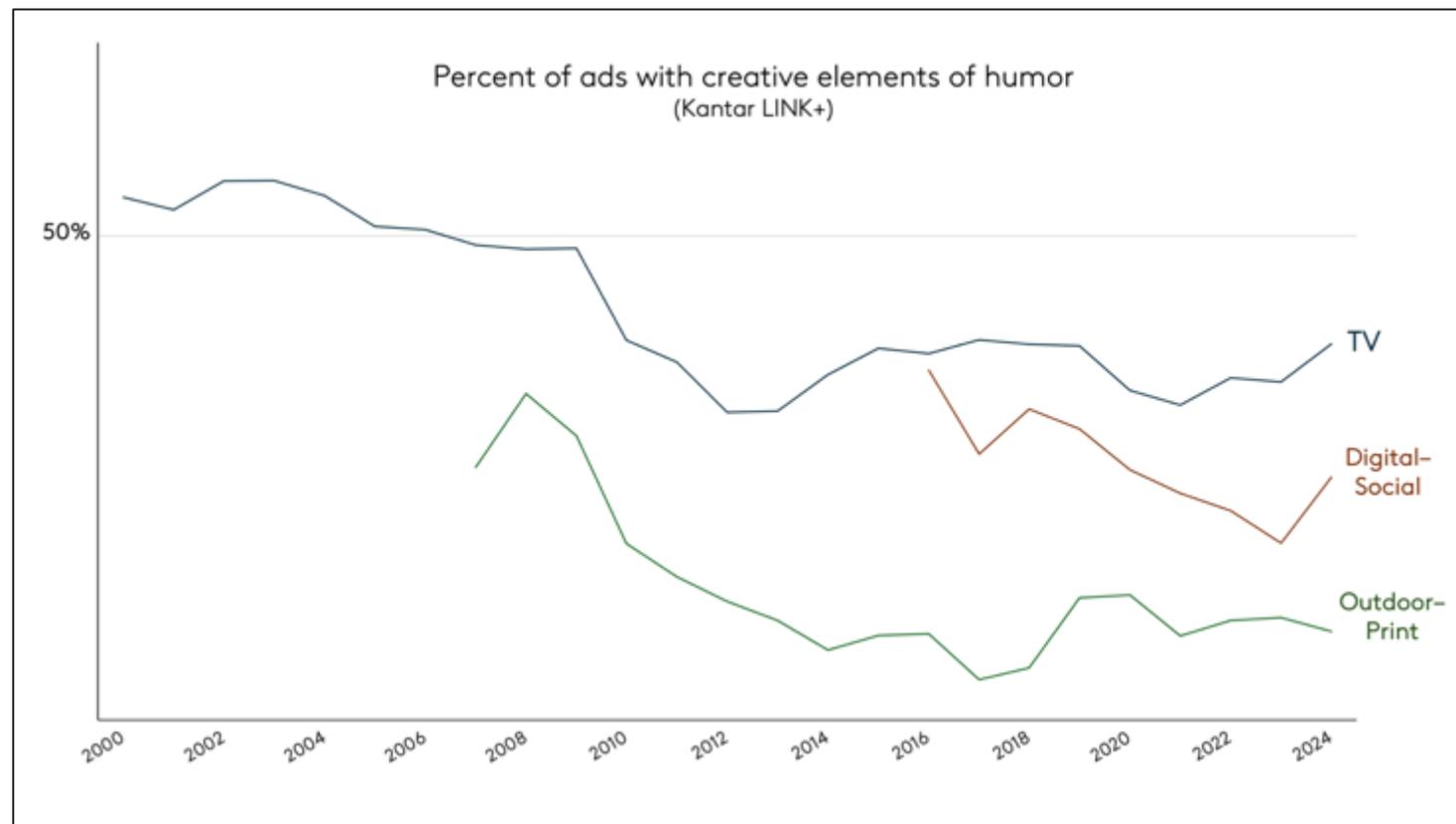
5 things that  
brands can  
change

# 6 Fix problems



7

Add  
humor



# 8

## Give time back

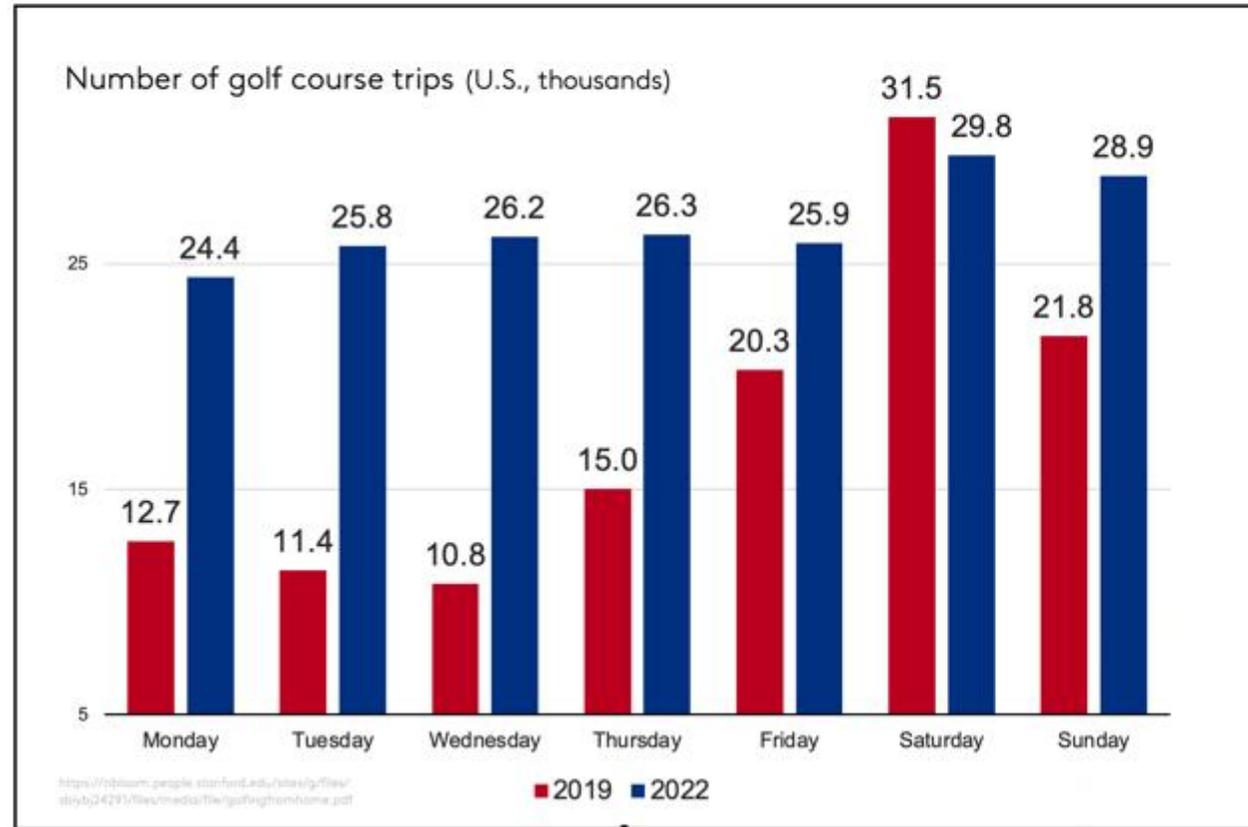
Which main human resource is the most valuable to you in everyday life?  
(Global MONITOR, % total global)

	2015	2020	2024
<b>Time</b>	<b>22%</b>	<b>35%</b>	<b>42%</b>
Money	23%	23%	23%
Energy	32%	25%	17%
Information	17%	15%	15%
Space	6%	2%	3%

U.S.  
39%

# Lifestyle

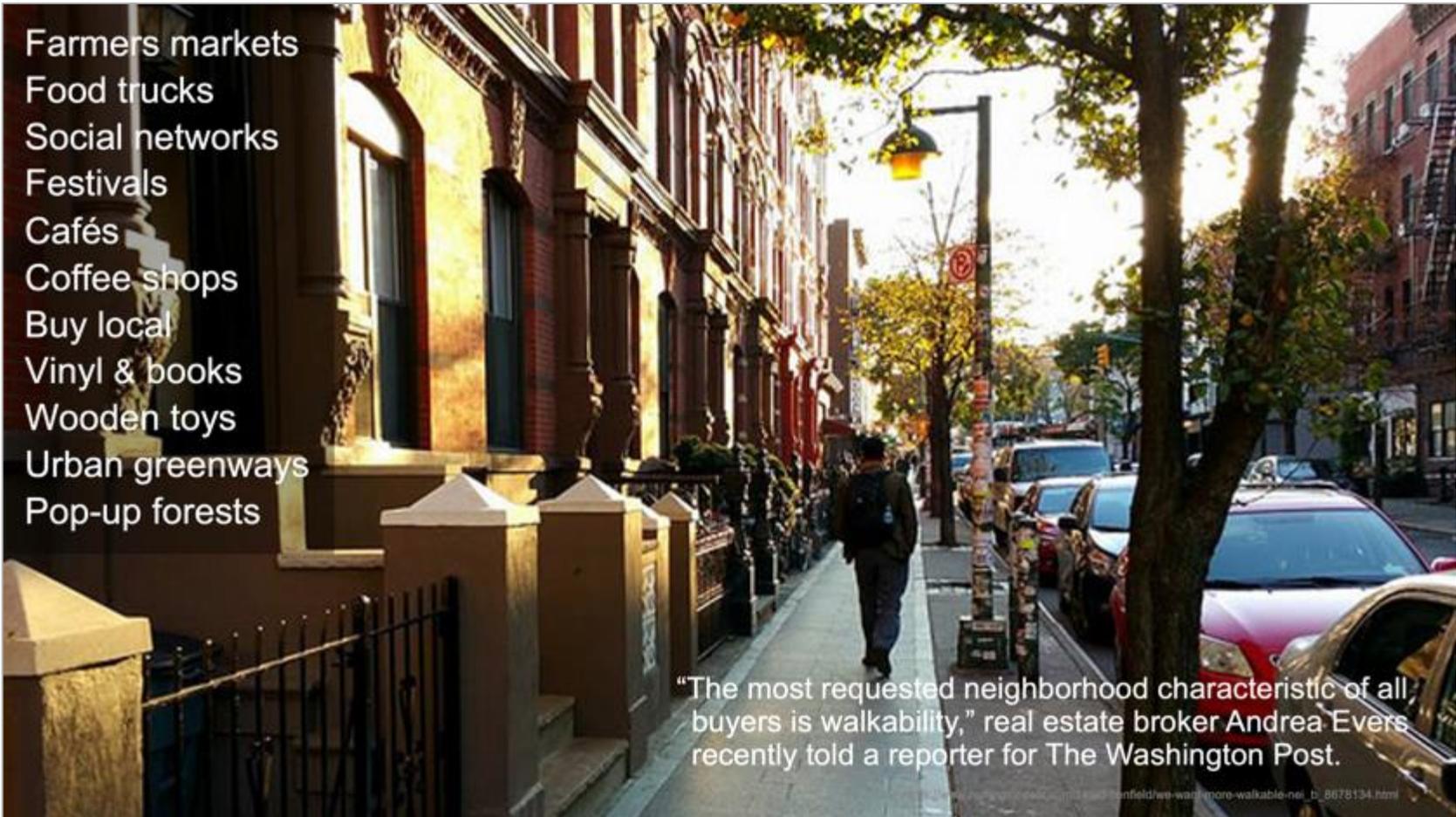
Control



Total golf course trips up 52%, 2019 vs. 2022  
Mid-week golf course trips up 83%, 2019 vs. 2022

# Experience

—  
Analog

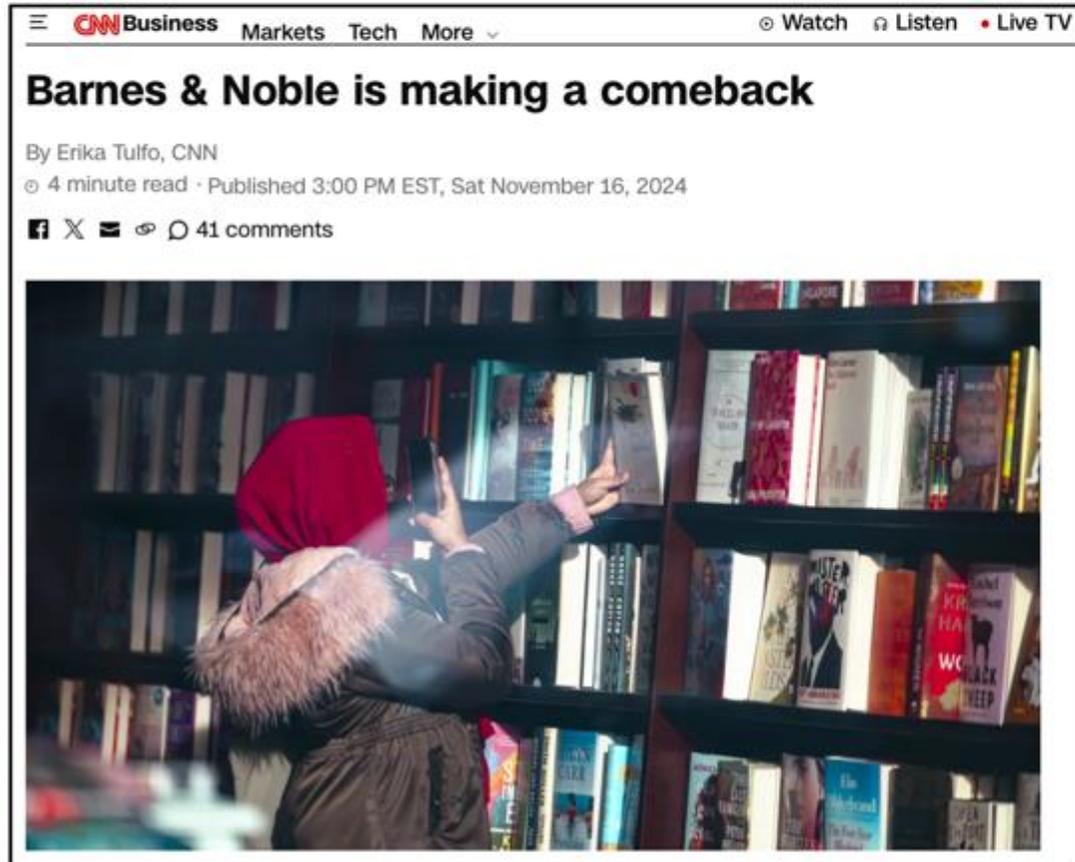


Farmers markets  
Food trucks  
Social networks  
Festivals  
Cafés  
Coffee shops  
Buy local  
Vinyl & books  
Wooden toys  
Urban greenways  
Pop-up forests

“The most requested neighborhood characteristic of all buyers is walkability,” real estate broker Andrea Evers recently told a reporter for The Washington Post.

# Experience

Hard copy



# Experience

Time at home

## Time spent out of the house has been falling since 2003

In 2020, there was a steep drop-off in minutes per day spent outside the home due to the COVID-19 pandemic. There's only been a slight recovery since then, and Americans spent nearly 1.5 hours less outside their homes in 2023 than they did in 2003.

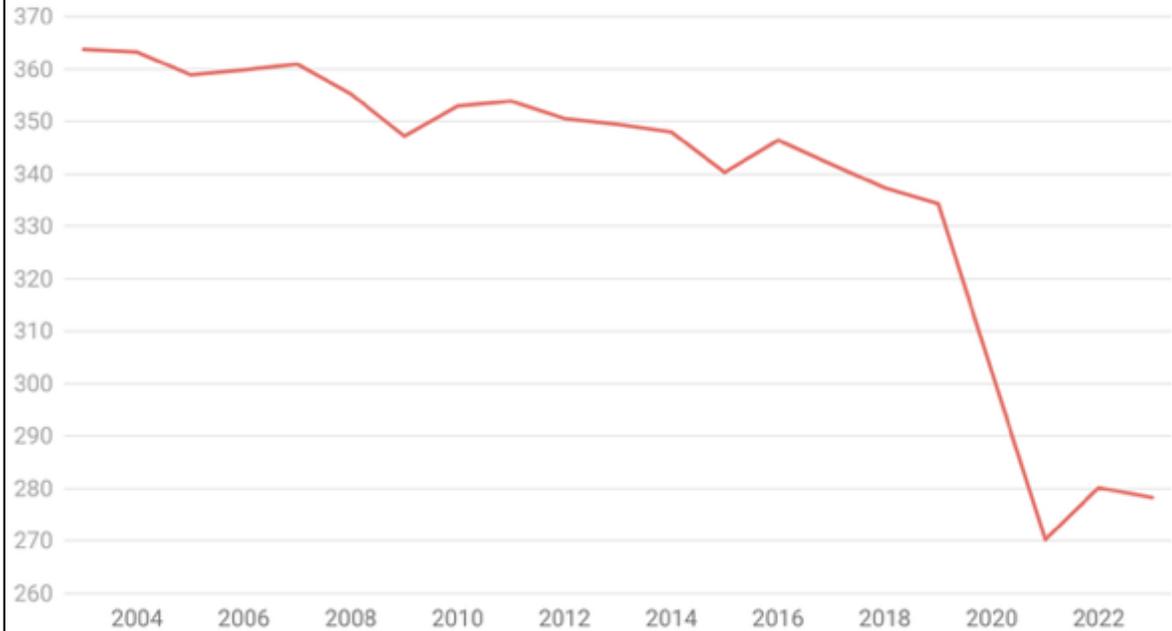
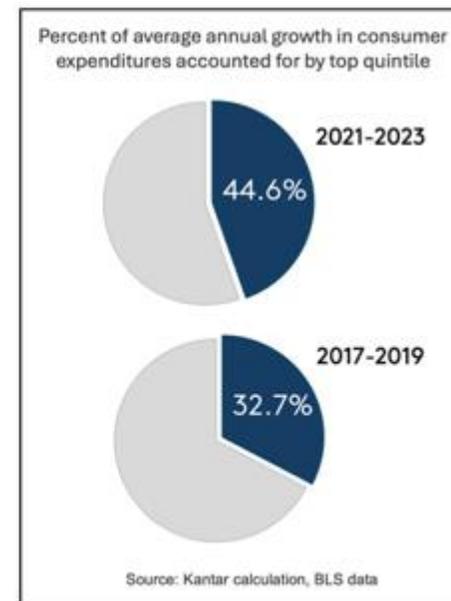
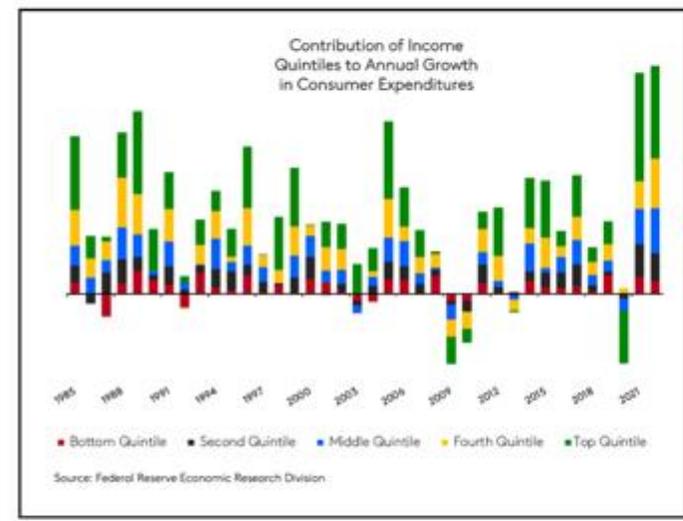
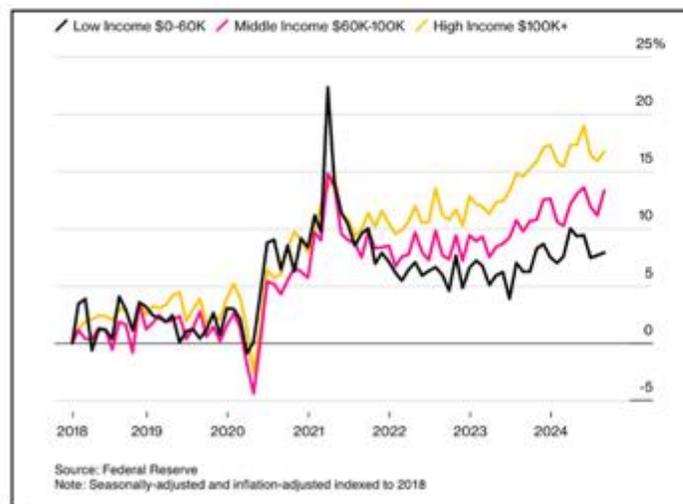
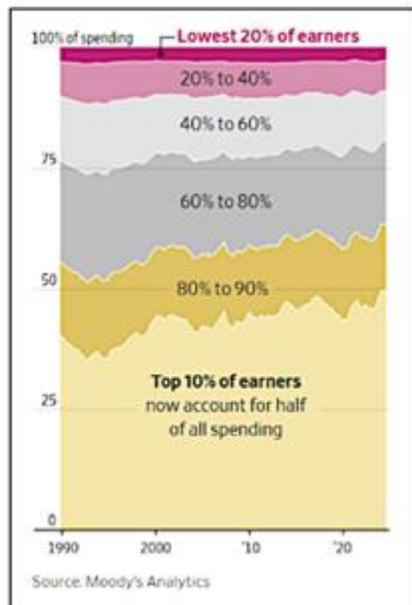


Chart: The Conversation, CC-BY-ND • Created with Datawrapper

# 9

## Bifurcate



10

Make  
bolder bets





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# Tech

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*Revolut*



**Revolut**

**facebook**



**FACEBOOK**

Google



Google

**Microsoft**



**Microsoft**

*airbnb*



**airbnb**

*Spotify*



**Spotify**

*Pinterest*



**Pinterest**

**ebay**



**ebay**

# Fashion

---

BALENCIAGA



**BALENCIAGA**

  
**BURBERRY**  
LONDON



**BURBERRY**  
LONDON ENGLAND

YVES SAINT LAURENT



**SAINT LAURENT**

Berluti



**BERLUTI**

BALMAIN  
PARIS



**BALMAIN**  
PARIS

**RIMOWA**



**RIMOWA**

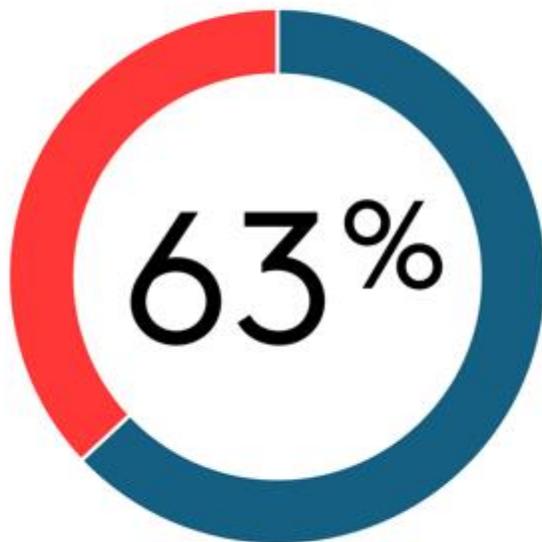
  
DIANE VON FURSTENBERG



**DIANE VON FURSTENBERG**

# Parity

Sea of  
sameness



**Most brands seem  
all the same to me**  
(U.S. MONITOR, 2024)

71%

Among both  
Millennials & Gen Z

Multiple

Meaningfully  
different

Brands that are meaningfully  
different to more people:

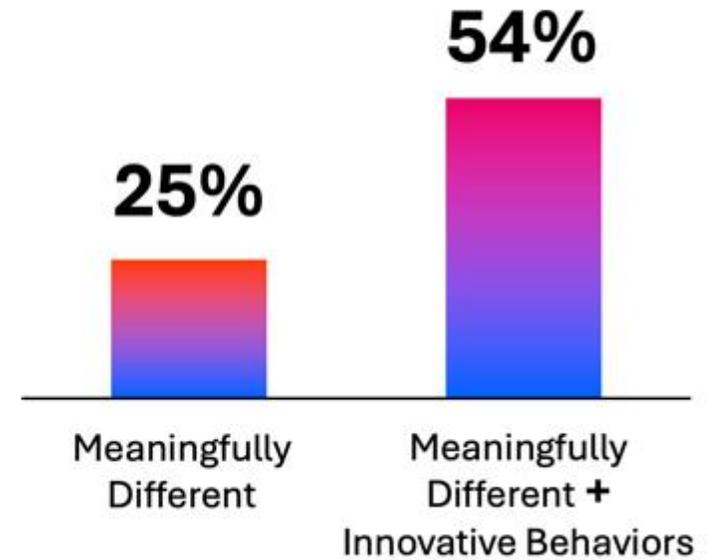
5x

penetration now

and much more likely to be  
growing over next two years

(Comparing top-third vs. bottom-third  
of meaningfully different)

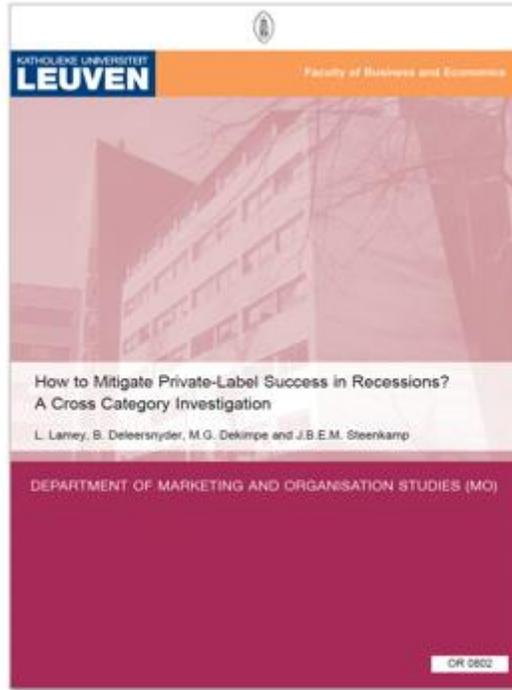
Brand value growth



(138 brands 2019 vs. 2023, with  
and without innovative behaviors)

# Value-Add

Innovate  
for bolder bets



“We find that **major innovations** are needed to limit private-label growth. They are *more difficult to imitate*, and keeping up their rate prevents national brands from losing a unique expertise/skill set that is difficult and time-consuming to recoup in the subsequent expansion.”

106 CPG categories: IRI, US 1985-2005. Kantar Media Intelligence. Datamonitor Product Launch Analytics.

<https://www.jstor.org/stable/41406835>

# Thriving in Turbulence

Make Bolder Bets



**Thank you!**