



WPP INVESTORS DAY – 07/04/2011

REBRANDING AND INTEGRATION
ERIC SALAMA

KANTAR

THE WAY WE WERE



KANTAR IS... A HOUSE OF BRANDS

Center Partners
Kantar Operations
Lightspeed Research

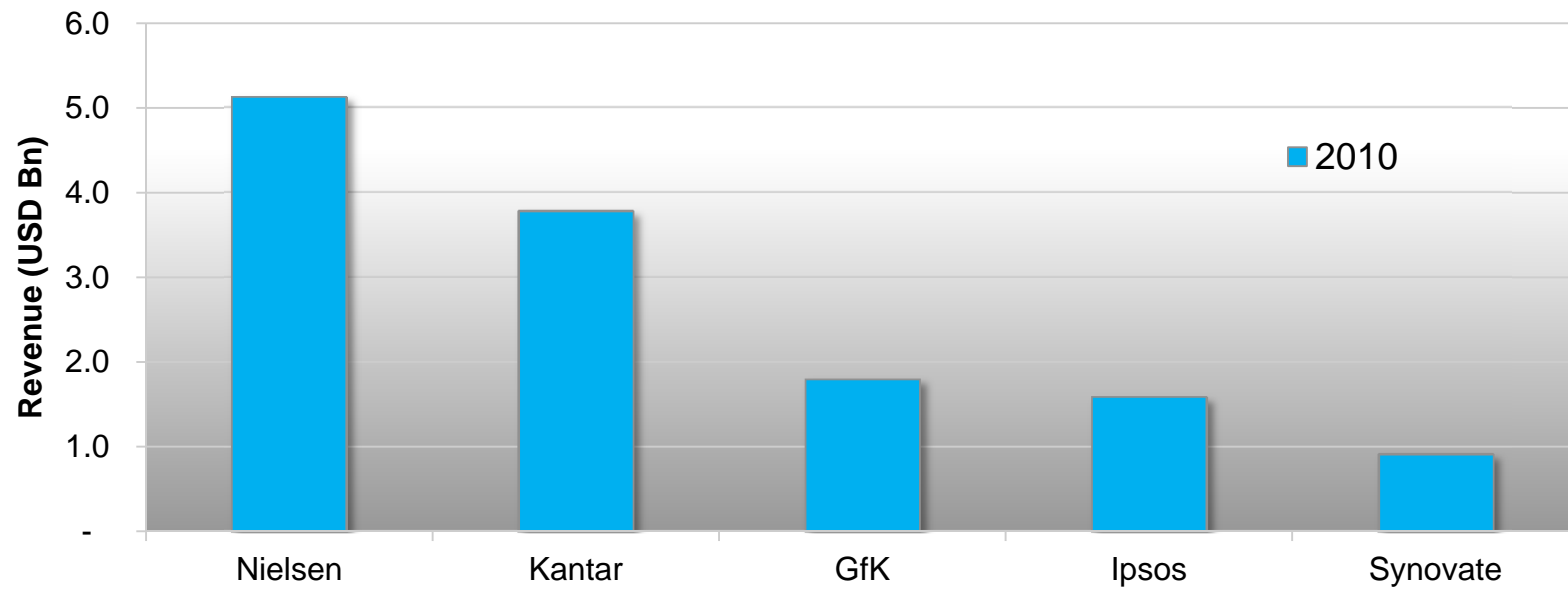
Kantar Health
Kantar Japan
Kantar Media
Kantar Retail
Kantar Worldpanel



KANTAR

Added Value
IMRB
Millward Brown
The Futures Company
TNS

PEER GROUP REVENUES FULL YEAR 2010



RESTRUCTURING

- Little or no involuntary loss of top talent
- Has improved offer and made easier for clients to buy

KANTAR IS... SOLUTIONS FOR EVERY STOP ALONG THE CUSTOMER JOURNEY

RETURN ON INVESTMENT

8

tns KANTAR MEDIA KANTAR RETAIL
KANTAR WORLD PANEL MillwardBrown

OPPORTUNITY ASSESMENT

1

the
futures
company

INNOVATION / IDEATION

2

tns ADDEDVALUE

CUSTOMER EXPERIENCE

7

tns

Lightspeed
RESEARCH
KANTAR operations

CONCEPT / PRODUCT TESTING

3

tns

TRACKING AND DELIVERY

6

KANTAR MEDIA
MillwardBrown

COMMUNICATIONS / TARGETING

5

KANTAR MEDIA
KANTAR RETAIL
MillwardBrown

GO TO MARKET

4

ADDEDVALUE KANTAR HEALTH
KANTAR RETAIL KANTAR WORLD PANEL
MillwardBrown tns

RESTRUCTURING

- Little or no involuntary loss of top talent
- Has improved offer
- Has enabled short and medium term cost cutting
 - Merged TNS and RI in 25 markets, 3 more to go in 2011/2
 - Rebranded 10 businesses
 - Closed 74 buildings and leases
 - Merging internet access panels in 15 markets
 - In middle of 3 year program to roll out single financial system, single HRIS system, single operational platform
 - Numerous offer related synergies (e.g. TGI France)
 - Met synergy target in 2010 - setting base for margin improvement as revenue returns to prior levels

KEY TAKEAWAYS

Integration has gone well, has generated savings and has resulted in a better more integrated offer

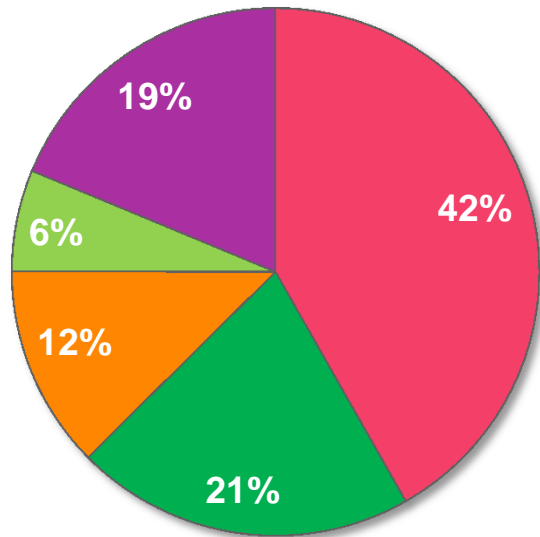
It did make us more internally focused for a period of time and we expect a renewed external focus and a leading edge offer to see us close the revenue gap between us and our competitors

FINANCIALS AND STRUCTURE
ROBERT BOWTELL

KANTAR

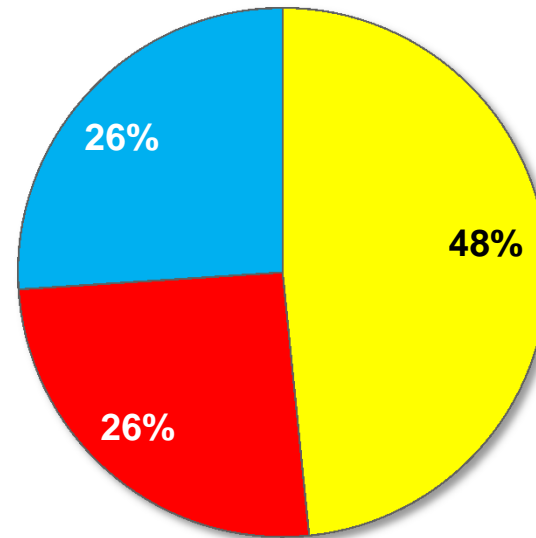
KANTAR STRUCTURE

BY NETWORK



■ TNS Custom ■ MB ■ Media ■ Worldpanel ■ Other

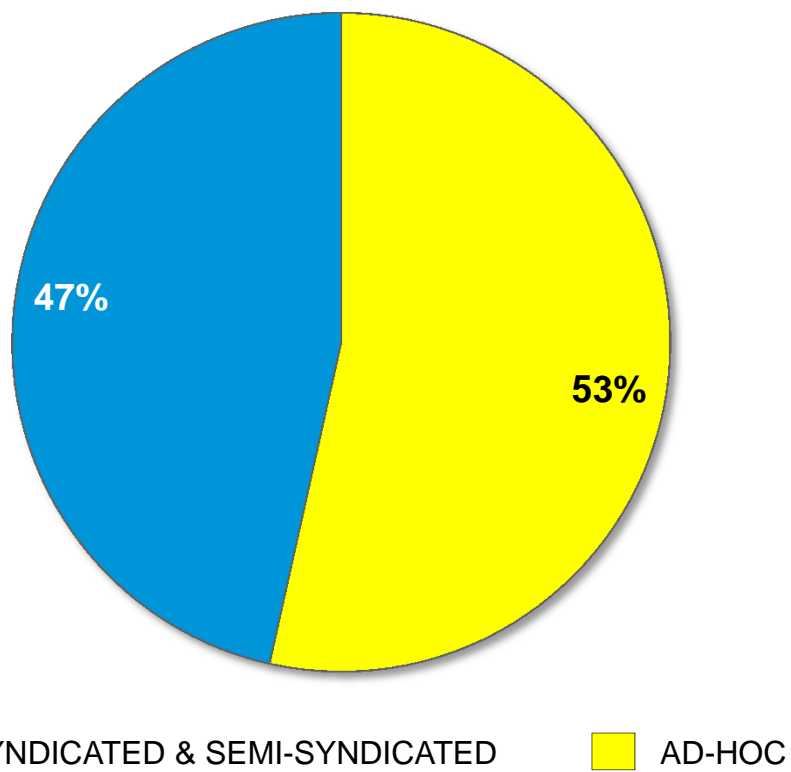
BY REGION



■ UK & Western Europe ■ North America ■ Faster Growing Markets

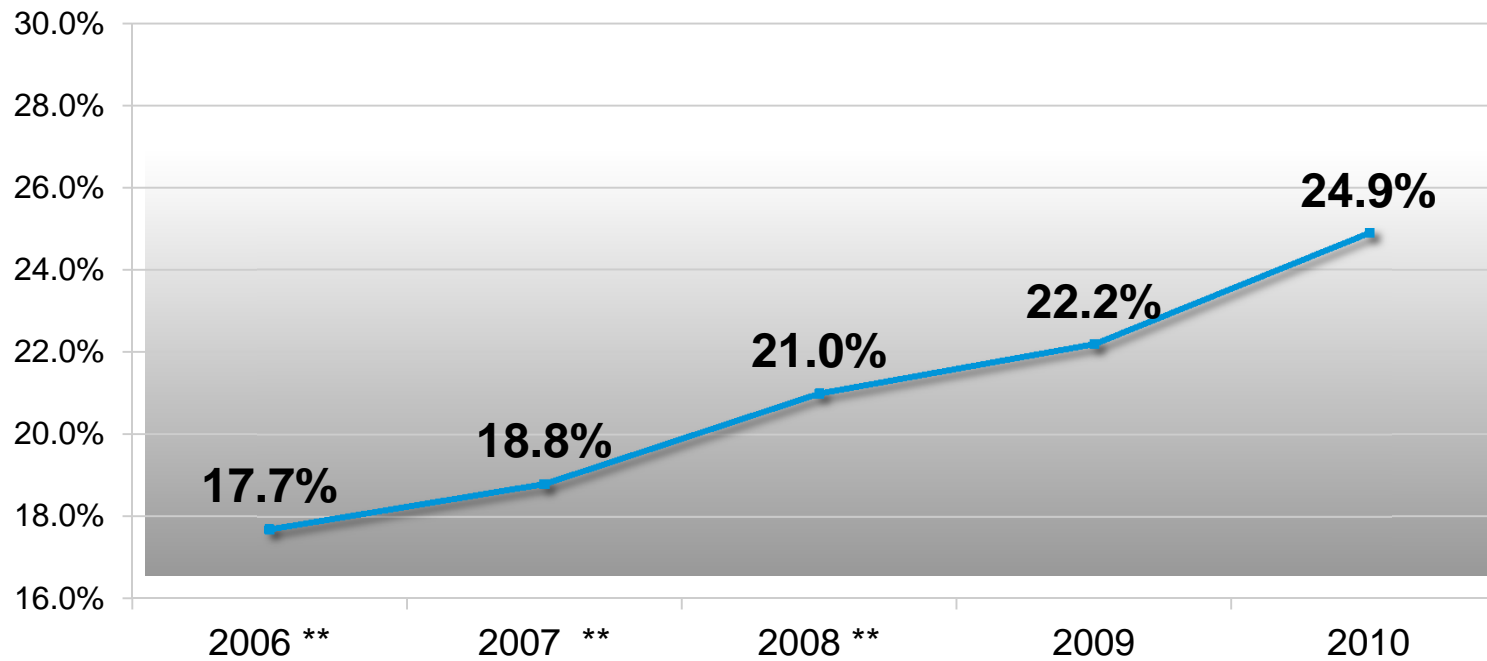
Source: 2010 net revenue excluding associates @2010 constant currency rates
Faster Growing Markets are Asia Pacific, Latin America, Middle East and Africa, Eastern Europe

REVENUE TYPES



Source: Management Information System

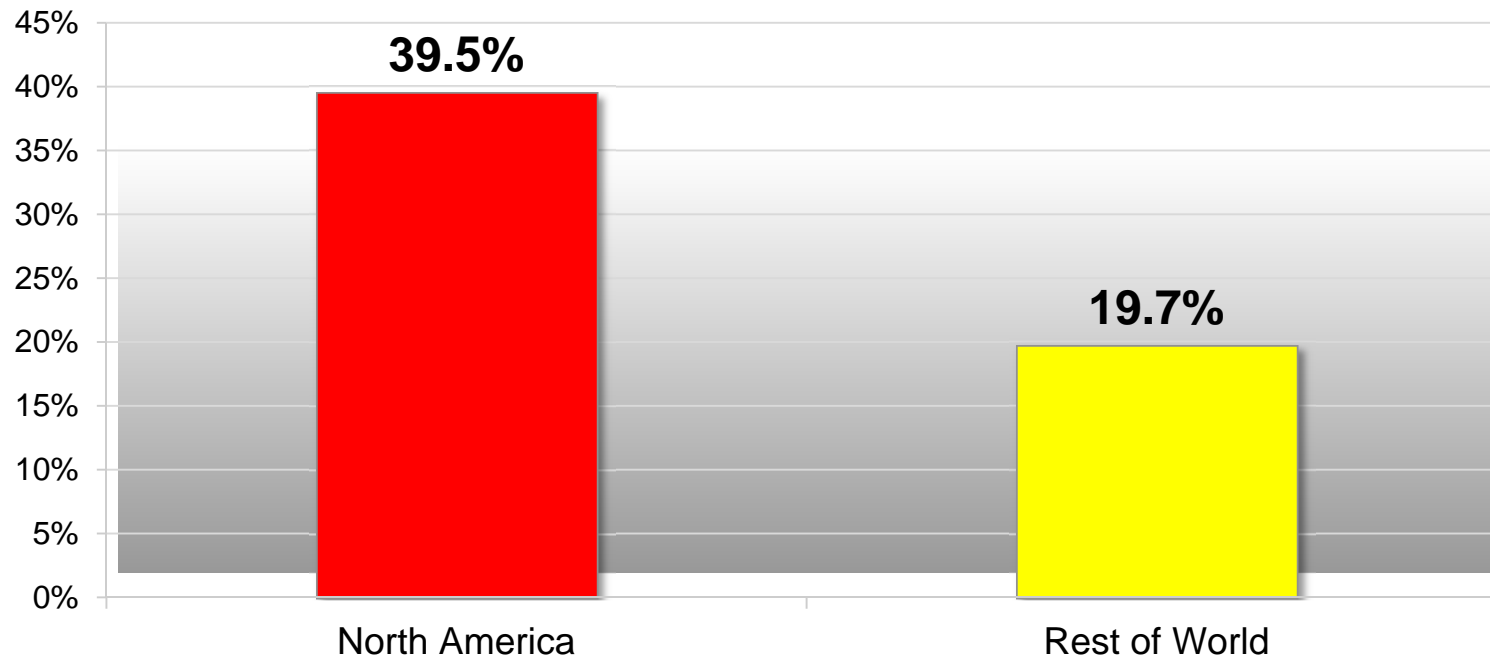
INTERNET AND DIGITAL PENETRATION % OF TOTAL REVENUE



Source: Management Information System

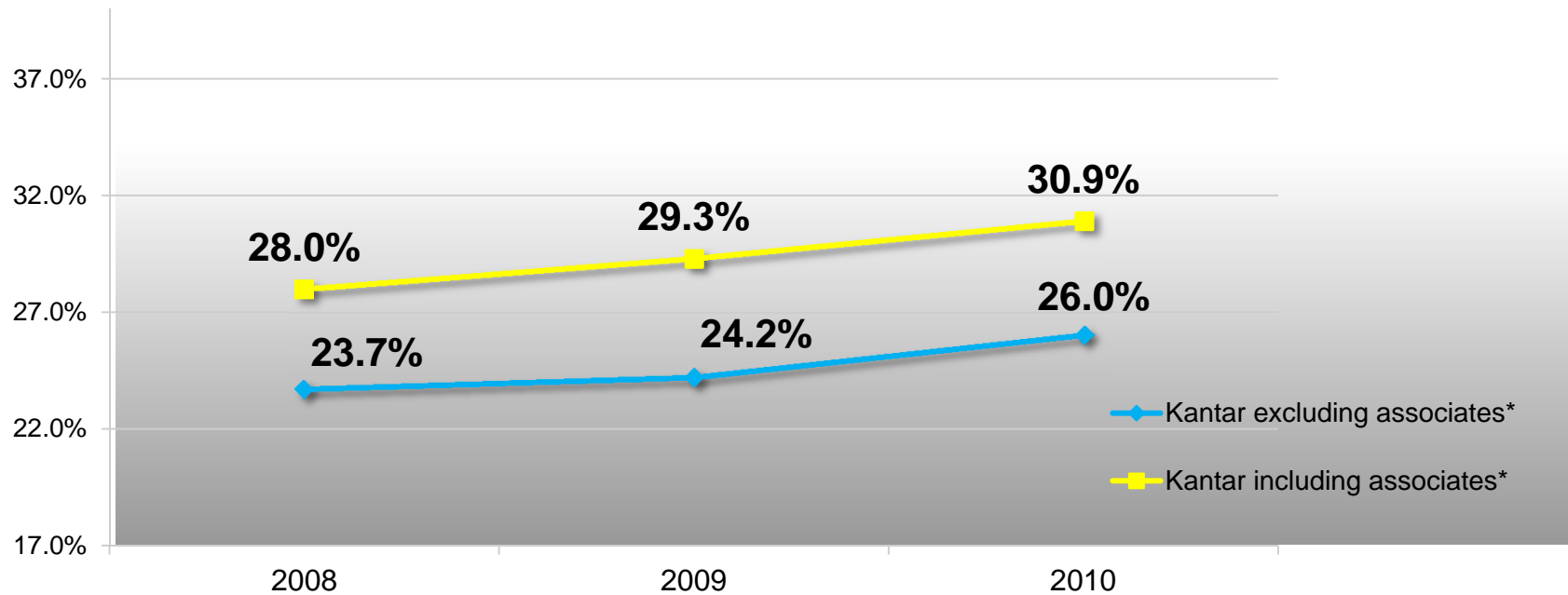
** Years 2006, 2007 and 2008 are on a combined TNS and Kantar proforma basis

LOWER INTERNET & DIGITAL PENETRATION OUTSIDE NA 2010 % OF REPORTED REVENUE



Source: Management Information System

FASTER GROWING MARKETS SHARE OF REVENUE

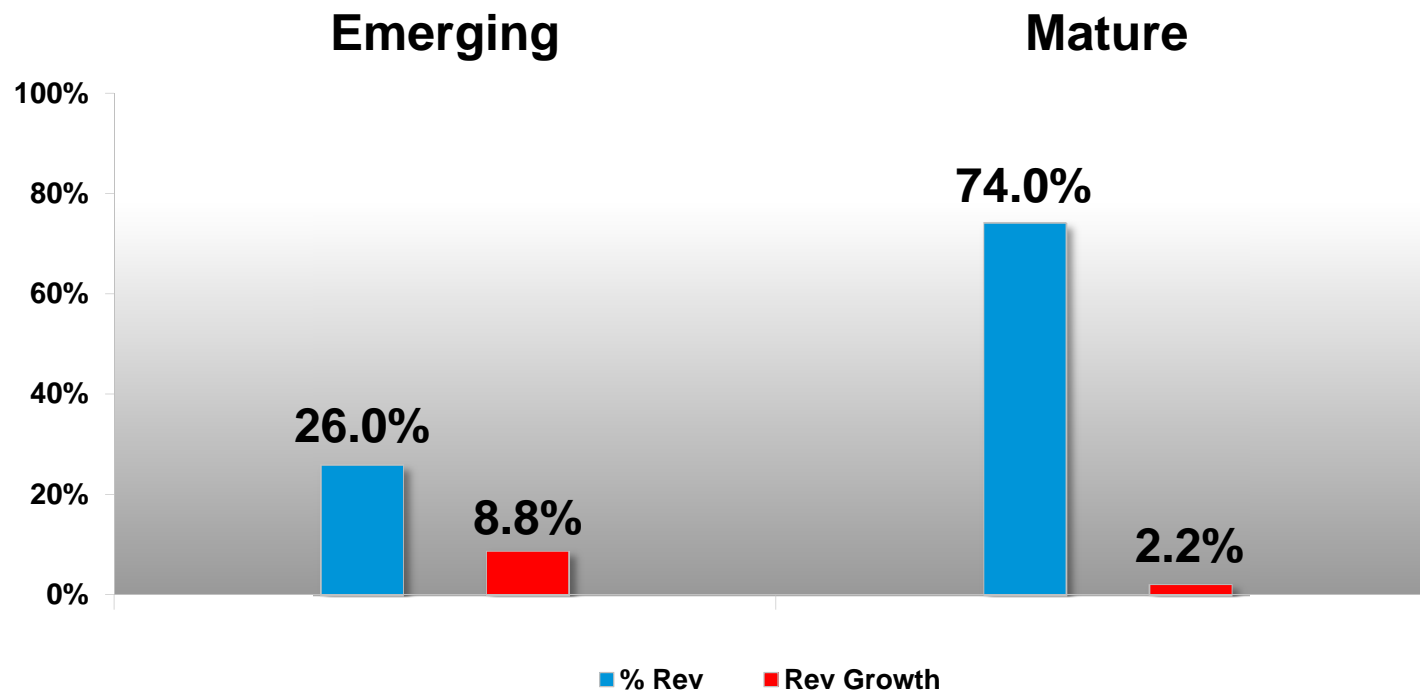


Source: Management Information System:

* Kantar 2008 based on full year proforma, 2009 and 2010 actuals

** Emerging markets share of Global MR revenue based on ESOMAR study (September 2010) with Kantar estimates for 2010 based on IMF GDP & population growth projections (April 2010)

KANTAR FASTER GROWING MARKETS 2010 REVENUE




Source: Management Information System

KANTAR LEADERSHIP POSITION IN TOP 10 MARKETS

MARKET	KANTAR POSITION
US	2
UK	1
GERMANY	2
FRANCE	1
JAPAN	3
CHINA	1
ITALY	4
SPAIN	1
CANADA	2
BRAZIL	1

Top 10 Markets based on ESOMAR 2010 Report. Kantar Position Includes Associates and has been sourced from 3rd party research providers in individual countries, company filings and Kantar management estimates.

KANTAR LEADERSHIP POSITION IN BRICS

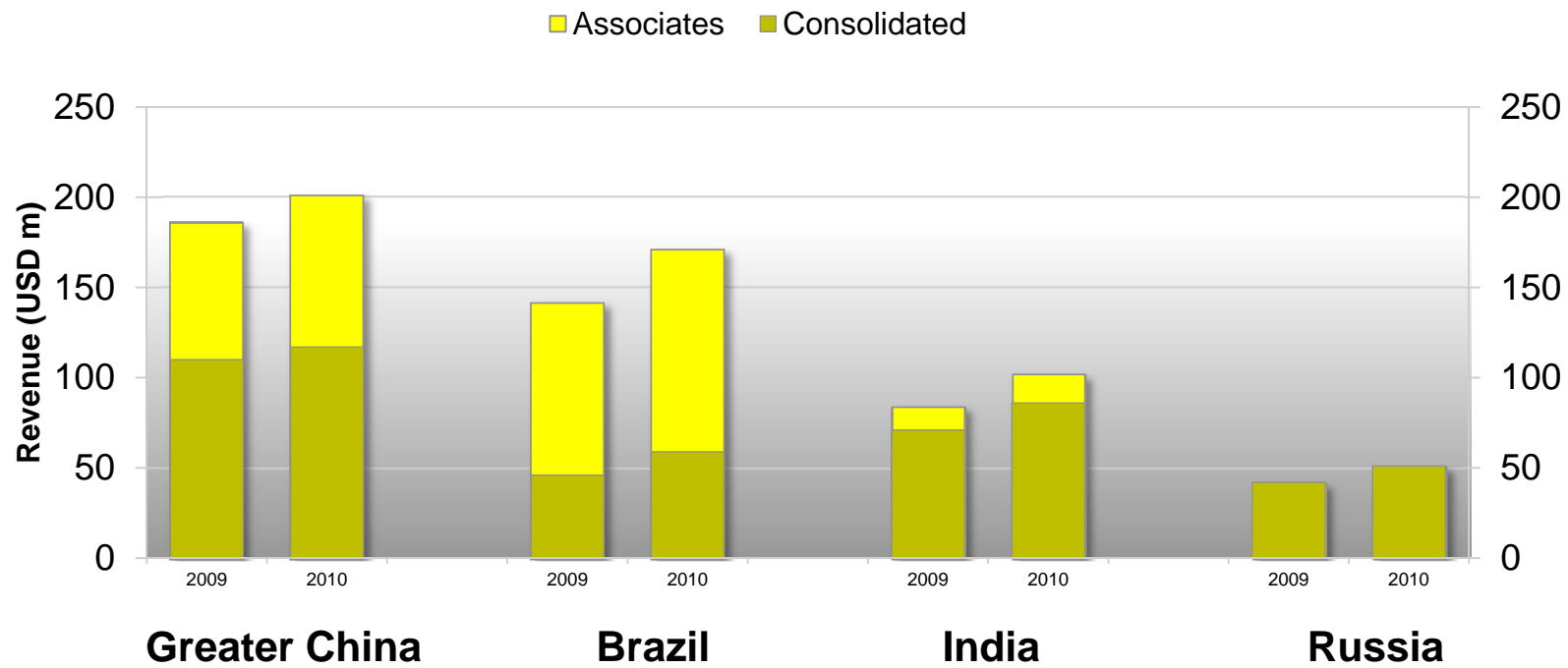


MARKET	KANTAR POSITION
CHINA	1
BRAZIL	1
INDIA	1
RUSSIA	1

Kantar Position Includes Associates and has been sourced from 3rd party research providers in individual countries, company filings and Kantar management estimates.

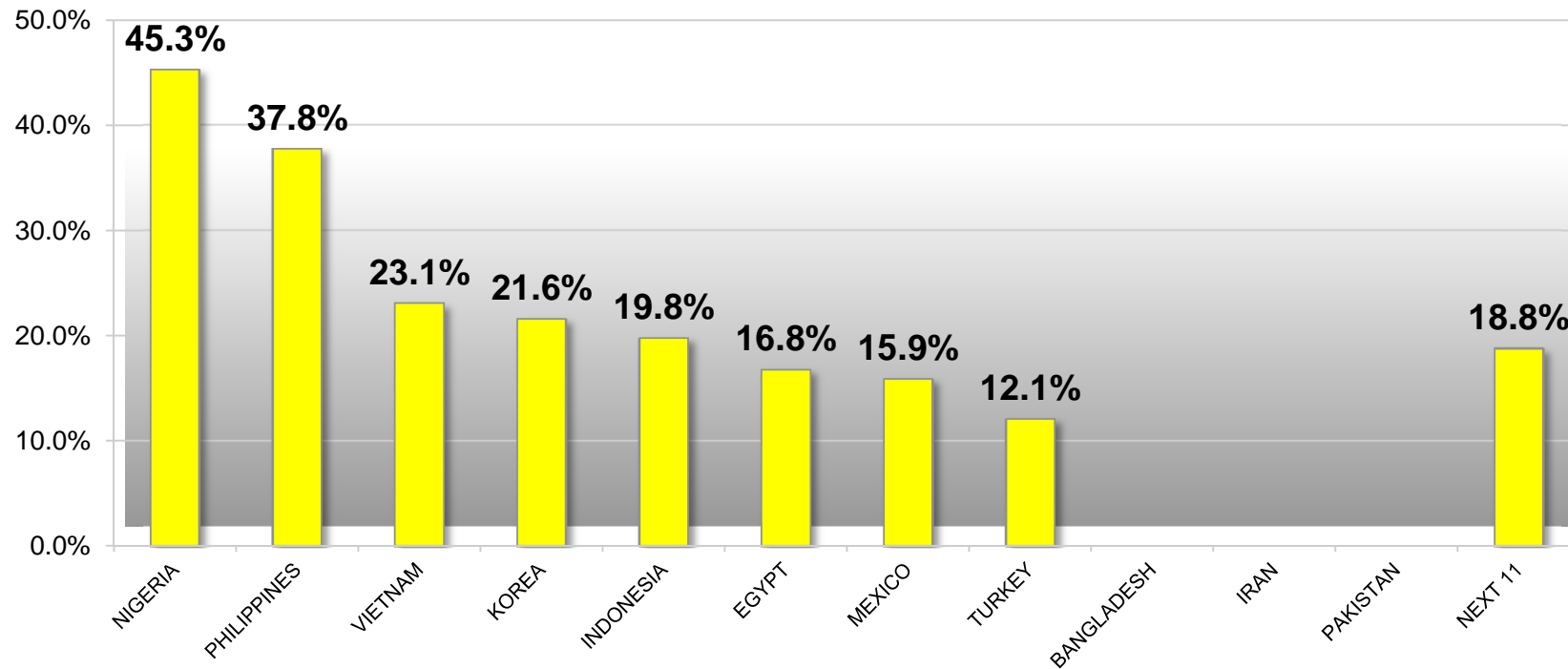
BRICS REVENUES

KANTAR FULL YEAR REVENUE



Source: Management Information System

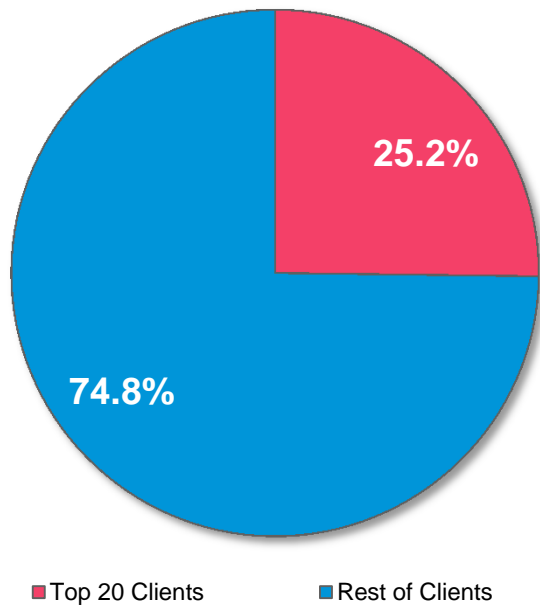
NEXT 11 MARKET SHARE



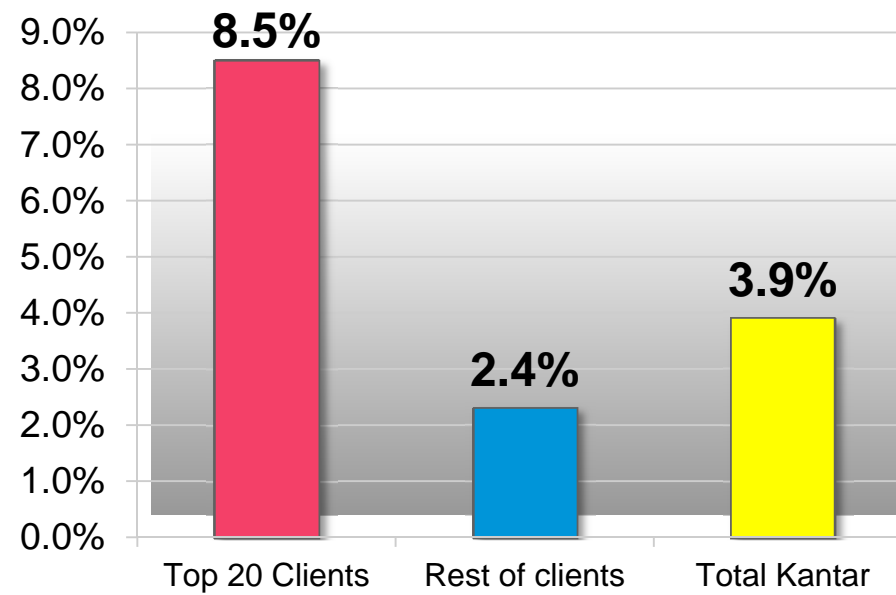
Source: Management Information System
Kantar 2010 based on full year proforma
Market share based on ESOMAR study (Sept 2010) with IMF GDP and population growth projections (April 2010)

2010 STRONGER GROWTH WITH TOP CLIENTS

% OF REVENUE

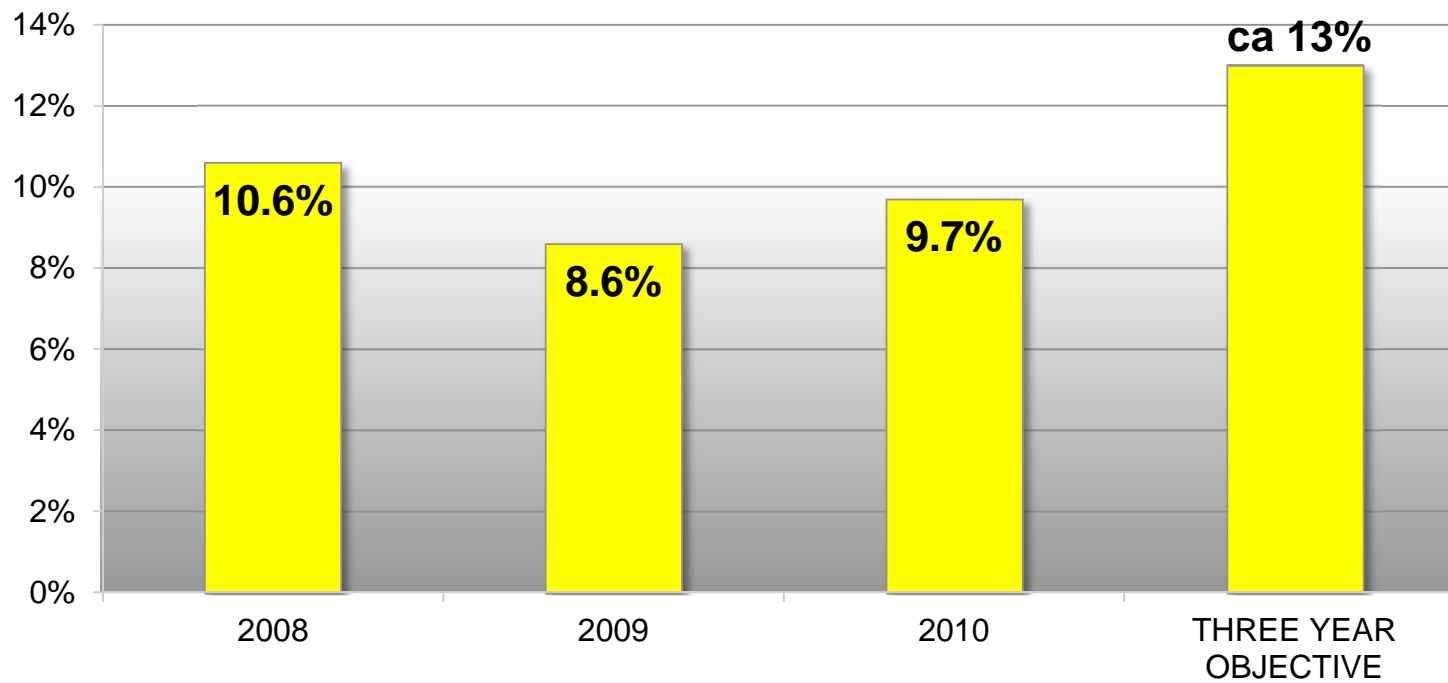


REVENUE GROWTH



Source: Management Information System: Top 20 clients based on 2010 full year revenue, growth represents full year organic growth

CONSUMER INSIGHT PBIT / REVENUE MARGIN



Source: Management Information System

* 2008 represents proforma combined Kantar/TNS Margin. (WPP reported 11.3% for Consumer Insight). 2009 & 2010 as reported by WPP.

MARGIN TARGET OF CA 13%

- Hold synergy benefits while revenue recovers
- Consolidate systems and back office
- Better execute at units below margin expectation
- Reduce direct costs through improved data collection cost and data efficiency
- Increase share of newer and higher margin offers
- Increase offshoring to reduce costs (currently 2,500 people offshore)

KEY TAKEAWAYS

We are well positioned from a geographical pov, with market leadership in all key emerging markets

Our digital revenues are increasing strongly and will continue to do so as markets go online

We are committed to improving margins and have got the levers in place to be able to do so

CLIENT OFFER AND
KANTAR STRATEGY
ERIC SALAMA

KANTAR

CLIENT CONTEXT

- Desire to partner with experts
- Move away from projects to insight streams
- Focus on usability, real time
- Step change in approach, greater senior management focus

"Research is not about providing insights, it's about provoking transformation"

Stan Sthanunathan, VP, Marketing Strategy & Insights, The Coca-Cola Company

"If you don't like change you are going to like irrelevance even less"

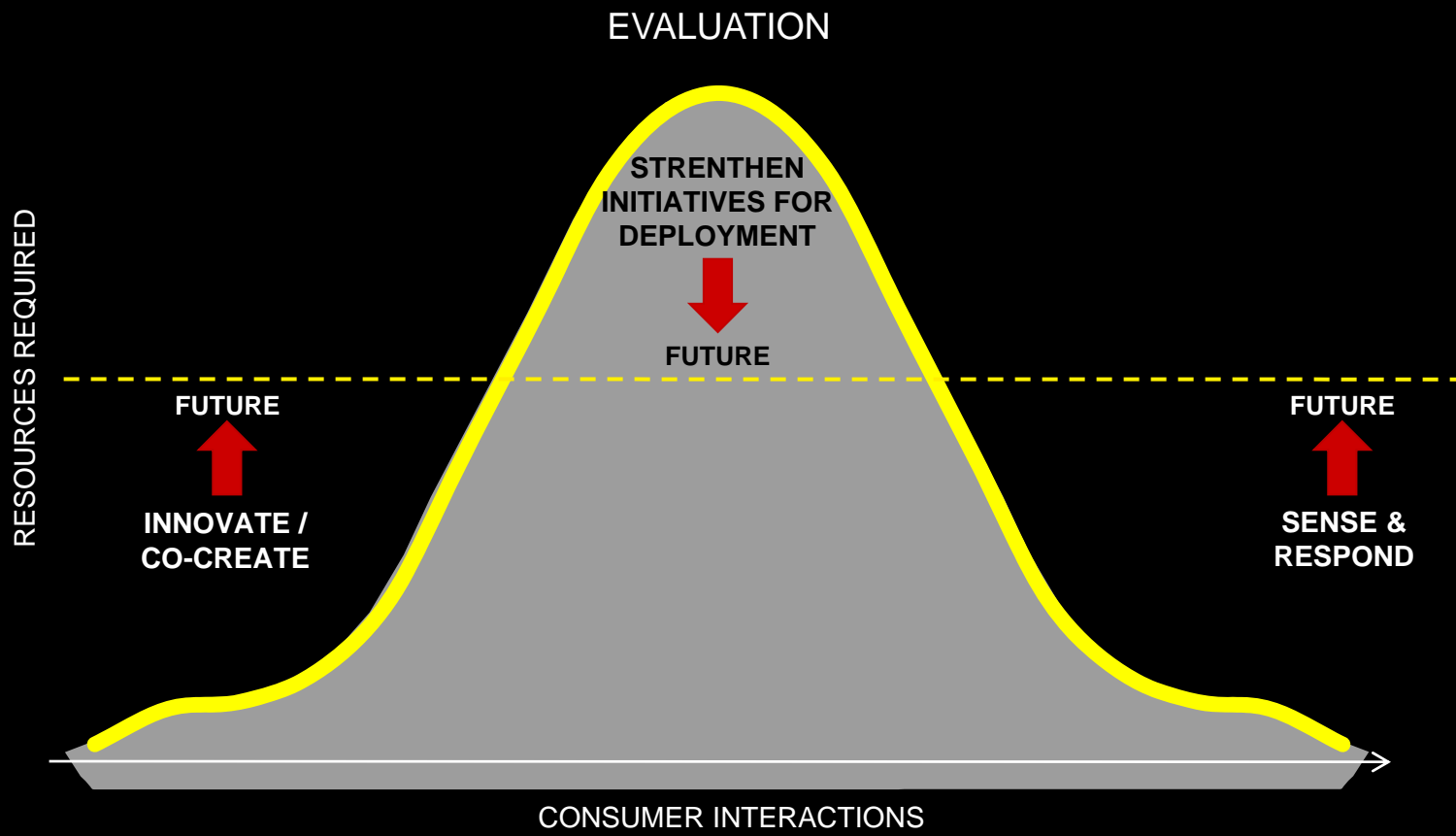
Joe Tripodi, EVP and Chief Marketing & Commercial Officer, The Coca-Cola Company

"Research has moved from observer, measurer and integrator to navigator and reputation guardian"

Reuben Mark, Retired Chairman and CEO, Colgate-Palmolive Company

KANTAR IS... OUR CLIENTS





WHAT INSIGHTS?

COMPELLING INSIGHT CAN REFRAME THE OPPORTUNITIES AND IMPROVE RETAIL EXECUTION

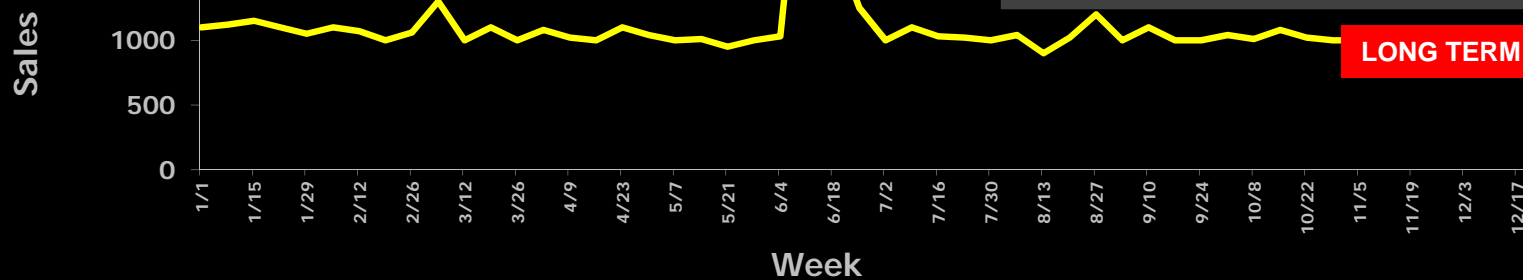
ILLUSTRATION

Traditional Analysis:

- Lift
- Incremental sales (deal week)
- Cost/incremental unit
- ROI (deal week)

Consumer Role:

- Who's buying?
- Purchase behavior?
 - Pantry-load vs. cycle compression
 - Trial vs. trade-up
 - Brand vs. category impact
- Expandable consumption?
- Subsidization?
- Deal-dependence?
- Variations of above by tactic



WHAT INSIGHTS?
HOW DELIVERED?

The True Size of Africa

A small contribution in the fight against rampant *Immappancy*, by Kai Krause

Graphic layout for visualization only (some countries are cut and rotated)
But the conclusions are very accurate: refer to table below for exact data

COUNTRY	AREA x 1000 km ²
China	9.597
USA	9.629
India	3.287
Mexico	1.964
Peru	1.285
France	633
Spain	506
Papua New Guinea	462
Sweden	441
Japan	378
Germany	357
Norway	324
Italy	301
New Zealand	270
United Kingdom	243
Nepal	147
Bangladesh	144
Greece	132
TOTAL	30.102
AFRICA	30.221



Top 100 Countries

Area in square kilometers, Percentage of World Total
Sources: Britannica, Wikipedia, Almanac 2010

In addition to the well known social issues of *illiteracy* and *innumeracy*, there also should be such a concept as "*immappancy*", meaning *insufficient geographical knowledge*.

A survey with random American schoolkids let them guess the population and land area of their country. Not entirely unexpected, but still rather unsettling, the majority chose "1-2 billion" and "largest in the world", respectively.

Even with Asian and European college students, geographical estimates were often off by factors of 2-3. This is partly due to the highly distorted nature of the predominantly used mapping projections (such as *Mercator*).

A particularly extreme example is the worldwide misjudgement of the true size of *Africa*. This single image tries to embody the massive scale, which is larger than the *USA*, *China*, *India*, *Japan* and *all of Europe*..... combined!

WHAT INSIGHTS?

HOW DELIVERED?

WHEN DELIVERED AND TO WHOM?



KANTAR'S APPROACH

COLLECT roll out platforms, leverage what you have and collect when you need to

CONNECT online and offline, behavior and attitudes, cause and effect

SPEED get good insights faster, recognise that some insights are only of value now

WHAT MAKES US DIFFERENT

- House of brands = deep expertise
- Market leadership in BRICS and all key emerging markets
- Research, consulting skills = insight into action
- Qual, data = ROI, deep insight, scalable
- Open source = clients able to join the dots
- Focus on creativity, real time = usability

KEY TAKEAWAYS

Parts of our strategy are inevitably similar to that of our competitors. But in terms of structure and emphasis on creativity, usability and connecting data we are different in a way that resonates with clients