KANTAR

FORBRUKER & MEDIA

Consumer and Media (Norwegian TGI)

Norway's largest survey for insight about peoples media and consumption habits

Content and structure

September 2020

Consumer & Media

The Norwegian Target Group Index (TGI)

Norway's largest survey about peoples media usage and consumption habits

Do you want to understand the media- and consumption patterns of your target group? Or maybe you want to know what is the profile of your current customers? Or maybe you want to know which media are most relevant in order to reach consumers that consider brand as one of the alternatives to buy?

Consumer & Media, (the Norwegian TGI*), is Norway's largest survey and data is collected continuously through the year. It gives you the possibility to compare different individual media towards each other, and to compare media usage directly with the consumers' lifestyle, consumption habits, brand preference, purchasing plans, decision responsibilities at work, demographics and geographic. It is an important tool for media- and creative agencies, brand owners and governmental authorities for market and target group insights, and for selecting media in an advertising campaign.

Data are presented in a software and you can have access to usage of the data through subscription, or we can tailor a report based on your current needs.

About Consumer & Media

- Established in 1988. Continuous updating of content to prevail relevance for insight deep dives.
- 45 000 yearly interviews.
- Measures approx. 960 individual media brands/titles.
- Measures brand awareness and preference for approx. 1.900. brands across 175 categories.
- Measuring 120 attitude statements, 90 interests and 40 activities.

*TGI = Target Group Index and an asset of Kantar

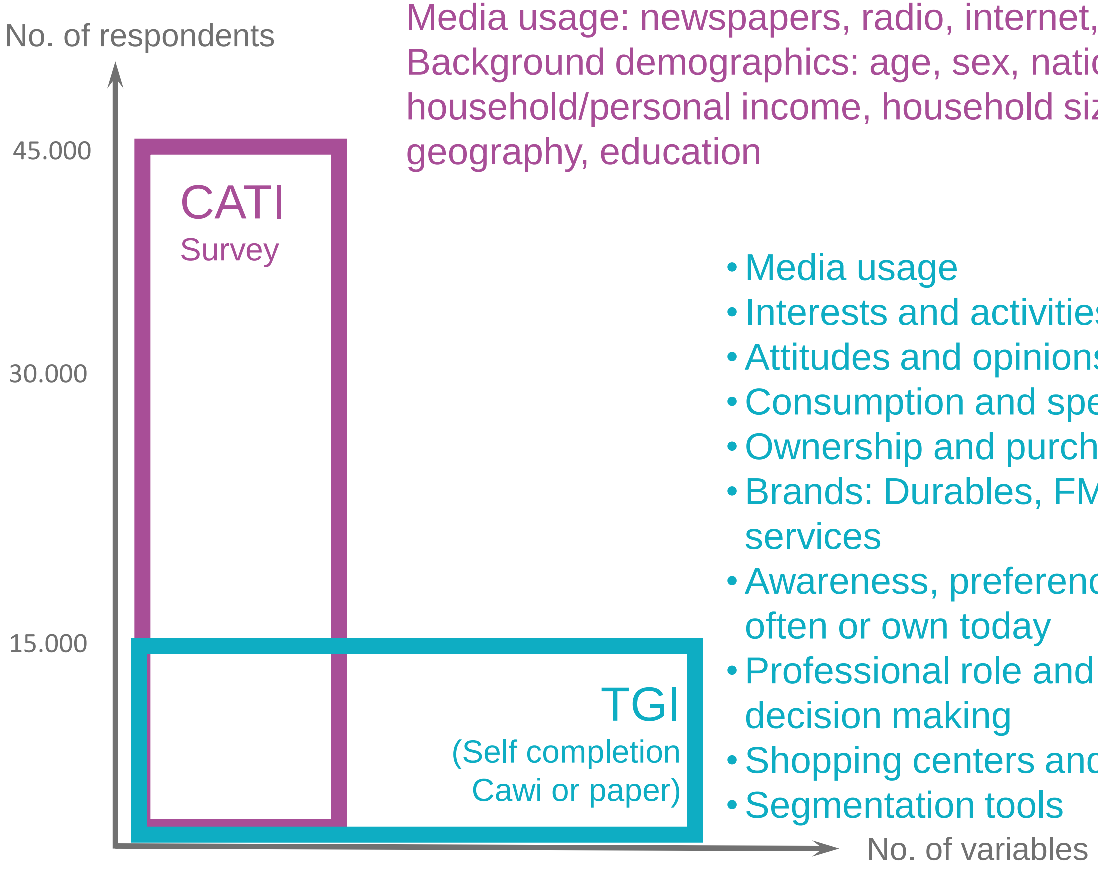
Consumer and Media (C&M) / Target Group Index (TGI)

Norway's largest consumer & multimedia study

The C&M study contains two parts

i) C&M CATI Survey
– Gathers data from 45.000 respondents on media usage as well as holding demographic information. The study includes official usage data for newspapers, radio, internet, TV and cinema.

ii) C&M TGI
– Approx. 15.000 CATI respondents also complete some but not all sections of a TGI questionnaire. All 15.000 complete a general section which includes questions relating to media usage (e.g. magazines), supplementary demographic information, attitudes and lifestyle.



Media usage: newspapers, radio, internet, TV, cinema
Background demographics: age, sex, nationality, household/personal income, household size, geography, education

- Media usage
- Interests and activities
- Attitudes and opinions
- Consumption and spend
- Ownership and purchase intentions
- Brands: Durables, FMCG and services
- Awareness, preference, use most often or own today
- Professional role and business decision making
- Shopping centers and local stores
- Segmentation tools

KANTAR

TGI content and sampling procedure (1)

CATI / Recruitment interview

Demography, geography and media usage

General and Common part:

Interests and activities, attitudes and opinions, editorial content, streaming and digital behavior, work status, family background, spending in categories, shopping habits and purchase decisions, shopping centers

PART 1

Fmcg and other non-capital goods

Category information:

Consumption, food & beverages, cosmetics, cleaning and toiletries, clothes, shoes, paint, grocery and convenience stores, gas stations, shopping centers, retail stores visits, etc.

+

BRANDS

– fmcg and other non-capital goods

(Brand Awareness, Brand Preference, Brand Use most often)

Food and beverage, household products, personal care, clothing and shoes, stores and retail chains, etc.

PART 2

Durables

Category information:

Ownership and purchase intentions, electronics, telecommunication, computer, mobile phones, bank & insurance, tourism/travel/leisure, furniture, building materials, interior materials, garden/flowers, children toys and equipment, cars, charity, lottery/gaming, retail stores visits, etc.

+

BRANDS

– durables and services

(Brand Awareness, Brand choice, Brand ownership)

Cars, white goods, telephone companies, mobile phones, real estate agents, bank/insurance, credit cards, restaurants, hotels, tourism, transportation, media, energy, health and training, stores and retail chains, etc

MEDIA INDEXES:	
• **Newspapers**	The official readership figures for newspapers including both paper and digital readership.
• **Magazines**	The official readership figures for magazines including both paper and digital readership.
• **TV**	Access and daily viewing of TV in total and individual channels. Including Heavy-Medium-Light viewing groups. (incl. Cinema!)
• **Radio**	Access and daily listening to Radio in total and individual channels. Including Heavy-Medium-Light listener grouping.
• **Internet**	Access and daily usage of Internet in total and loyalty of usage of individual sites. Including Heavy-Medium-Light user groups.

FORBRUKER & MEDIA

MARKET AND CONSUMER INDEXES:	
• **Lifestyle**	Statements that describes peoples attitudes, opinions and outlook on life as well as their interests and activities they take part in. This section is the main foundation for the different segmentation models that are developed.
• **Consumption**	Questions about peoples consumption patterns, spending on different products and services, and shopping habits. In this section we have included Opinion Leadership and Word of Mouth categorizations.
• **Durables**	Ownership and purchase intentions of different types for durables/capital goods and services. Travel, holiday, banking, insurance also folds into this index.
• **Brands**	Awareness, preference and usage of a variety of different brands within different product categories across fmcg, services and durables. The information is presented in different graphical tools
• **Work and decision making**	Information about occupation and professional life. Business sector/industry, company size, title and position, decision-making responsibility and/or influence in different product categories.
• **Regional**	Awareness, preference and usage of local shopping centers in different areas of Norway.
• **Editorial**	Information about interests in different content categories in media in general and in specific media channels. Online surf and search behavior.
• **Sosioraster**	Segmentation based on sociology and the theories of the French sociologist Pierre Bourdieu where family background and upbringing are important factors.
• **Kompass**	Lifestyle segmentation model based on attitudes, activities and interests
• **LifeValues**	Kantar TGI global segmentation model based on 32 standardized attitude statements on different subjects.
• **OCEAN**	Kantar TGI model of calculating the “The Big Five” personality traits (Openness, Conscientiousness, Extroversion, Agreeableness, Neuroticism)
• **Mosaic**	Moasic is a sosiogeographic segmentation model with global presence. 13 Mosaic segments and the 44 underlaying Mosaic types are available for analysis and insight in C&M.

Key facts Consumer & Media Study

Norwegian TGI

Consumer & Media survey at a glance:

In Consumer & Media (Forbruker & Media) we have approx. 5.800 variables in the TGI part of the survey and 2.500 in the CATI part, There is a single source recruitment from the CATI to the TGI (web/postal) part of the study.

Overall we have approx. 8.300 variables altogether per respondent.

Categories and Brands:

- 173 Categories
  - (36 shop/retail categories, 29 categories of services, 108 product categories)
- 1.897 Brands
  - (293 shops, 311 services companies, 1.293 product brands)

Lifestyle: Attitudes, interests and activities

- Attitude statements: 120
- Interests: 92
- Activities/doings: 40

2.

Segmentation and market models within Consumer & Media (TGI Norway)

Segmentation models within TGI Norway

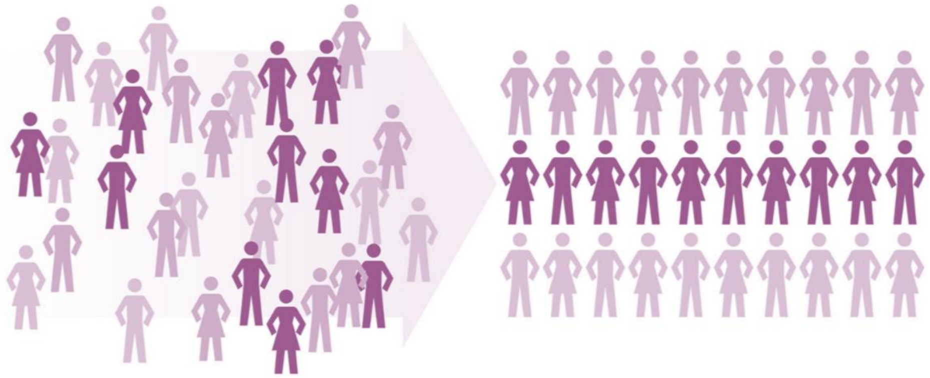
FORBRUKER & MEDIA

Different segmentation solutions

The software Gallup PC contains all the C&M data, including different segmentation tools for analysis purposes.

The different segmentation solutions are

1. Compass
2. Life Values (Kantar global modell)
3. Sosioraster
4. Connected Life (Kantar global model)
5. Word Of Mount index (WOM)
6. Early Adopters
7. Media Consumption Index (H, M, L)
8. Generations
9. Mosaic
10. OCEAN (Kantar global model)



Applications: Identify and describe target groups, communication strategies and media planning

1. Compass

Lifestyle segmentation based on attitudes, interests and activities

Segmentation methodology

The segmentation tool is based on the idea that the personal attitudes and actions of individuals in a society will follow given patterns.

The two main dimensions in the *Compass*:

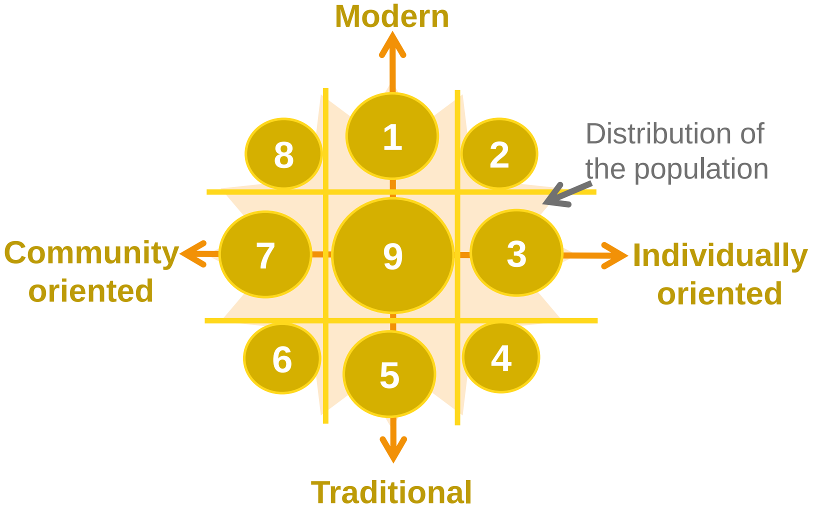
- Dimension 1: Community – Individuality
- Dimension 2: Modern – Traditional

In *Compass* the population are divided into 9 segments.

The method being used to create the two dimensions, and consequently the 9 segments, is Principal Component Analysis (PCA), base on different *subjective* variables:

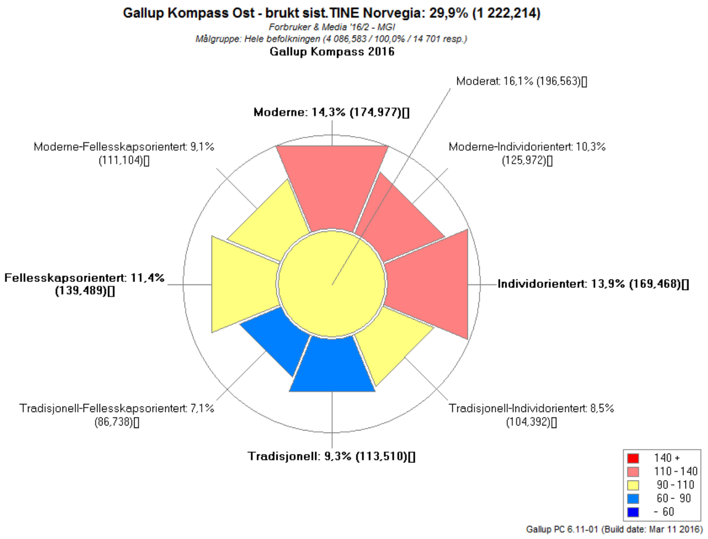
- Interests and activities: sport, culture, music, technology and media.
- Opinions and attitudes towards different subjects: risk and regularity, environmental and economical issues, shopping and consumption habits, level of solidarity and cultural and economic liberalism in the society.

Two main dimensions and 9 segments



Example on graphical output

- Usage of cheese brand "TINE Norvegia"
  - Red: high indexed segments
  - Blue: Low indexed segments



Compass

Segment description

FORBRUKER & MEDIA

08 Modern –Community Oriented (9 %)
Male 20-49 yrs. old
Education: High
Income: Low to medium (students low)
Environmentally conscious and socially engaged, trendsetter, fashion interested. Quality-conscious consumers. Internet is an important news source.
Activities: festivals/concerts, opera/theater, library, art exhibitions and museums, going out (nightclubs/bars), climbing, running, team sports.

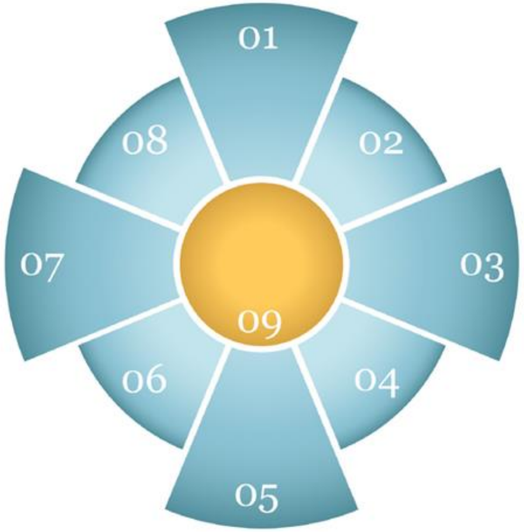
01 Modern (12 %)
Male 20-49 yrs. Old (the youngest segment)
Education: Many students
Income: Low or high (students low)
Interested in popular music, shopping, electronics, movies & series. Like trying new things, follows fashion trends, brand conscious. Thrill seekers, like challenges. Active online (social media, looking for brands/services, search),
Activities: video gaming, team sports, jogging, watching sports on TV, outgoing (nightclubs/bars).

02 Modern – Individually Oriented (9 %)
Male 20-49 yrs. old
Education: Many students
Income: Low or high (students low)
Thrill seekers. pro privatization and market-economic management in the society, brand conscious, like to try new things before others. Politically right wing. Concerned about their careers. Interested in technology, fashion, shopping, gaming and cars.
Activities: Active in sports both as spectators and participants. Often go to the pub/bar/nightclub.

09 Moderate (16 %)
40-49 yrs. old
Education: Medium to high
Income: Medium to high

Mainstream.
Medium socially engaged.
Interested in work, home and family.
Activities: golf, hunting, fishing, cross country skiing and general exercise / training.

07 Community oriented (12 %)
Women 40-59 yrs. old
Education: High
Income: Medium to high
Community engaged, interested in culture, quality and environmentally conscious. Focus on organic food, good ingredients and a healthy diet, likes food from different parts of the world. Listens to classical music, jazz and folk music.
Activities: cultural venues, religious events, hiking, cross-country skiing.



03 Individually Oriented (12 %)
Male 30-49 yrs. old
Education: Low
Income: Medium to high
Materialistic, like new technology, pro privatization and market-economic management in the society. Not very interested in fashion and culture. Price conscious.
Activities: Hunting and fishing, watching sports on TV, not very interested in physical exercise.

06 Traditional – Community Oriented (9 %)
Women 60-79 yrs. old
Education: High
Income: Low to medium
Tradition, moral, safety seekers, cautious consumers, many religious, fond of Norwegian products, environmentally conscious, engaged in family and health. Generally interested in culture. Newspapers (local and national), radio and television. Listens to opera, jazz and 'danseband'.
Activities: go to the theater, museums, library, opera and art exhibitions, religious events. Not very interested in physical exercise.

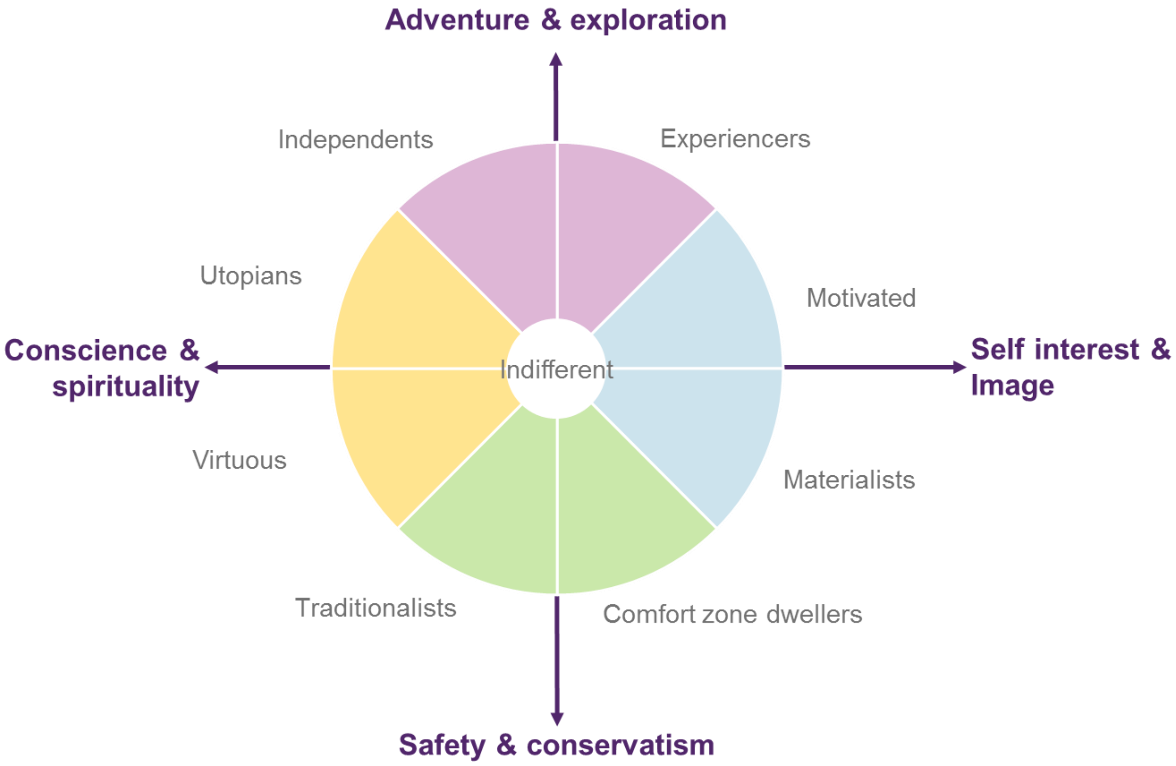
05 Traditional (12 %)
Women 60-79 yrs. Old (the oldest segment)
Education: Low
Income: Low (many pensioners)
Tradition, safety seekers, like regularity and order. Loyal customers. Cost and quality conscious consumers. Interested in gardening, sports on TV and enjoy folk music and 'danseband' music. Traditional media use, newspapers very important, reading magazines.
Activities: Fishing, walks, hiking, religious events.

04 Traditional - Individually Oriented (9 %)
50-79 yrs. old
Education: Low
Income: Low
Price conscious. pro privatization and reduction of social security and foreign aid, like well-known brands. Seeks safety and like routines. Listen the 'danseband' music, country and roots. Politically right+ wing. Traditional media dominates.
Activities: Hunting and fishing, but not very interested in physical exercise.

2. Life Values segmentation

Lifestyle segmentation based on the transcultural Schwartz Theory of Basic Human Values

The model and it’s segments



Summary overview of the segments

1. **Motivated:** tend to put themselves first and are open to change. Highly ambitious and willing to take risks to get to the top. Very concerned with image and appearance, and are avid consumers.
2. **Experiencers:** have a strong desire for adventure and novelty, and tend to focus more on their own interests. Thrill-seeking, self-expressive and image-conscious
3. **Independents:** more adventurous, combined with a selfless attitude. Enjoy being different and have a strong sense of self-belief. Often creative and free-thinking, and reject superficial symbols of wealth or success.
4. **Utopians:** philanthropic and spiritual, but also welcome change and risk. Often idealistic, with strong convictions, many support liberal causes such as environmental or conservation groups. Tend to reject materialism and expect organisations to behave ethically.
5. **Virtuous:** tend to be more altruistic and somewhat conservative. Concerned with duty and are willing to donate time to good causes. Act responsibly and tend to reject hedonistic or immature behaviour.
6. **Traditionalists:** conservative but with a less self-centred orientation. Tend to be patriotic, valuing society’s existing customs. Often religious and live fairly ‘sedate’ lives.
7. **Comfort Zone Dwellers**: primarily conservative, with a focus on themselves. Risk averse and value image and appearance, worrying what others think of them. Tend to be family-orientated, reserved and often ‘old-fashioned’ in opinion.
8. **Materialists:** focus on themselves but are also fairly conservative. Want to project the ‘right’ image – but that endorsed by society rather than individuality. Use brands to express their self-identity and are positive about marketing.
9. **Indifferent:** the hardest to pin down as they find little to agree with. Rather than being inconsistent, they tend to be neutral on many attitudes.

3. Sosioraster

Segmentation based on sociology

Segmentation methodology

The segmentation tool is based on the French cultural sociologist Pierre Bourdieu's study and his book *La Distinction*..

The two main dimensions in the *Sosioraster*:

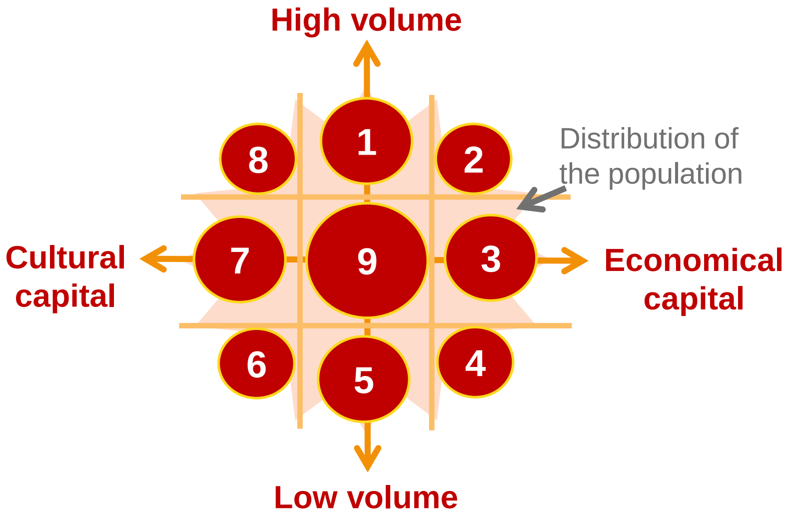
- Dimension 1: Cultural capital – Economic capital
- Dimension 2: Low volume – High volume

In *Sosioraster* the population are divided into 9 segments (social fields with homogeneous groups) based on their economic and cultural capital.

Multiple Correspondence Analysis (MCA) is used to create the two dimensions, and consequently the 9 segments, from *objective* background variables:

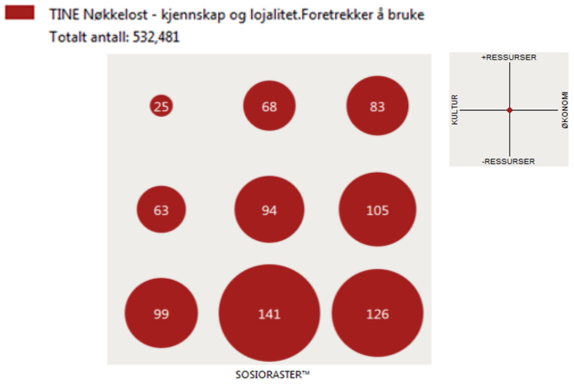
- total value of car(s)/boat(s)/house(s)/secondary home(s) and other assets, household income, heritage cultural capital (grew up in a home with encyclopedia/ piano/ foreign books/chess), level of education, subject areas education, private/public school, occupation, occupation private/public sector, level of education and occupation of parents).

Two main dimensions and 9 segments



Example on graphical output

- Preference to cheese brand "TINE Nökkelost"
  - Segment size and index value



  - Position of Brand and main competitors

Sosioraster

Segment description

High volume - Culture
Women 20-39 yrs. old
Education: High
Income: Low
Politics: Labor, highest share of voters for Green Party
Gallup Compass: Modern – Community oriented.

Highest cultural capital
Subject areas – higher education: medicine, law, science, philosophy, history. Work: public sector, education, research.
Highest share of students.

High volume
Male 20-49 yrs. old
Education: High
Income: High
Politics: Labor and Right
Gallup Compass: Modern and/or Community oriented.
Work: private sector, administrative/HR, consulting, IT, research.

High volume - Economy
Male 40-59 yrs. old
Education: High
Income: High
Politics: Right
Gallup Compass: Modern and/or Individually Oriented

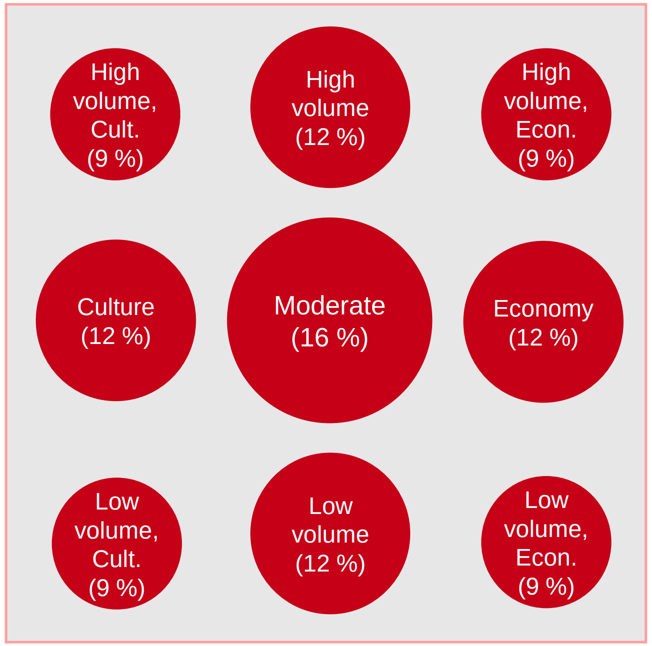
High cultural capital
Subject areas – higher education: economy, technical. Work: private sector, IT, economy. Highest share of managers/CEO's.

Moderate
20-49 yrs. old
Education: Medium to high
Income: Medium to high
Politics: Labor
Gallup Compass: Evenly distributed among the segments, but with lower shares within the Traditional segments.

Mainstream.

Culture
Women 20-49 yrs. old
Education: Medium to high
Income: Low
Politics: Labor, highest share of voters for Red Alliance.
Gallup Compass: Modern and/or Community oriented.

High cultural capital
Subject areas – higher education: health care, society. Work: public sector, health care, education.



Economy
Male 40-69 yrs. old
Education: Medium to high
Income: High
Politics: Labor, Right
Gallup Compass: Individually Oriented.

The segment with the highest share of men. Subject areas – higher education: economy, technical. Work: private sector, economy. High share of managers/CEO's.

Low volume - Culture
Women 40-69 yrs. old
Education: Low to medium
Income: Low
Politics: Labor
Gallup Compass: Evenly distributed among the segments, but with lower shares within the Modern segments.
The segment with the highest share of women. Subject areas – higher education: health care. Work: public sector, health care. High share of pensioners.

Low volume
40-69 yrs. old
Education: Low to medium
Income: Medium to high
Politics: Labor
Gallup Compass: Traditional or Individually oriented
Low cultural capital
High share of persons with secondary school as their highest education level.
Work: private sector, production, logistics, crafts. Highest share of pensioners.

Low volume - Economy
Male 50-69 yrs. old
Education: Low to medium
Income: Medium to high
Politics: Labor, highest share of voters for Right++
Gallup Compass: Traditional or Individually oriented

Lowest cultural capital
High share of persons with secondary school as their highest education level.
Work: private sector, production, logistics, crafts. High share of pensioners.

4. Connected Life

Segmentation based on digital influence and social media engagement

Background and methodology

Connected Life segmentation classifies the population into five segments based on their level of digital influence and engagement in social media. The model stems from Kantars Connected Life study and has being recreated using existing variables within Consumer & Media

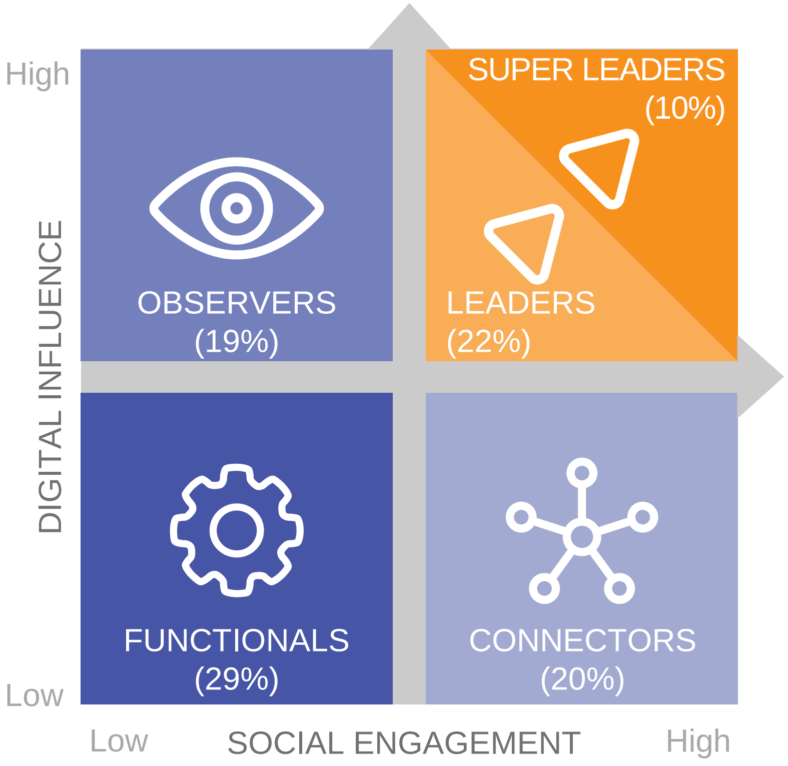
The two dimensions in *Connected Life* are::

- Dimension 1: Low to high digital influence
- Dimension 2: Low to high social engagement

Principal Component Analysis (PCA) are used to create the two dimensions, and consequently the five segments, from variables measuring digital media usage and social media engagement:

- *Freq. of use:* internet, social media, internet through smart phone/tablet and streaming services. Where to access internet: home/work/school/other places. Freq. of downloading music/films/series, looking for and reading reviews on products/services online, reading/writing blogs, participate in chatting/ discussions, comment/share/like/retweet.

Two main dimensions and five segments*



Description of the five segments

SUPER LEADERS

Within the leader segment – the most active and most social group of all. Likely to be the earliest of adopters, the influencers and the trend setters.

LEADERS

The most digitally, and socially active of all the segments. They may be online as much as the Observers, but they are highly social, creating and sharing content, and engaging with brands.

CONNECTORS

Spend a limited time online, but when they are, they are heavily social.

FUNCTIONALS

Spend the least time online – either through choice, or lack of access. Will often use online where there is a tangible advantage, but are the slowest to adopt new trends. They are the least social of all the groups.

OBSERVERS

Spend a lot of time online, but are less open to engaging with brands in a social space.

Global Kantar model

*segment sizes and descriptions as for Norway in The Connected Life Study 2017/2018

5. Word of Mouth and Opinion Leadership

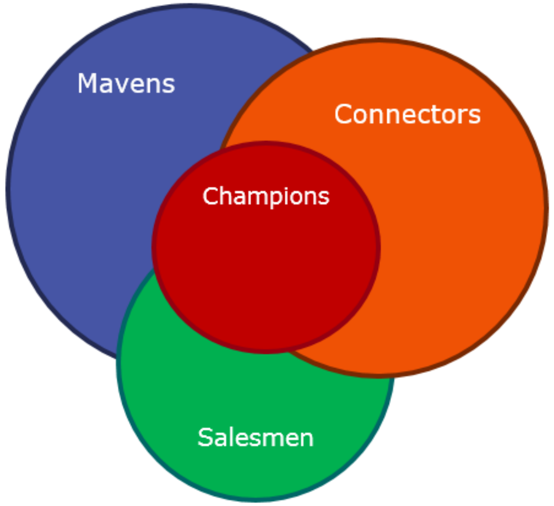
Classification of consumers in different product groups according to their knowledge, persuasiveness and interaction with others

Background and Methodology

The WOM index maps out opinion leaders within specific categories. Opinions leaders are people who have an ability and a willingness to spread messages and influence other people's behaviors through their views and advice. The models background can be found in **two-step flow of communication model** that says most people form their opinions under the influence of <u>opinion leaders</u>, who in turn are influenced by the <u>mass media</u> (Paul Lazarsfeld *et al.* 1944).

- Based on questions about social skills, innovation willingness and interest in new products, TOGETHER with questions about how updated or interested a respondent are <u>in different categories,</u> we are able to define three segments for each category; *Connectors*, *Salesmen* and *Mavens*. (ref. Malcolm Gladwell, The Tipping Point, 2000). The ones who classifies into all segments are defined as *Champions* (Opinion Leaders).
- The different WOM segments can help "amplify" an advertising campaign and/or product launch significantly through f2f communication or social media. In today's digital world this can happen much faster than before because of social media.

Four segments and 12 product categories



<u>The segmentation is done in these specific categories:</u>

Food and beverage	Economy
Health, Cosmetics	Electronics
Clothing & shoes	Politics and society
Leisure and Travel	Cosmetics
Automotive	TV, Radio & music equipment
Interior, house and home	Occupation / Profession

Description of the segments

CONNECTORS

Connectors are <u>**super social**</u> and "talk" to many about their areas of interest. With a large network and a social competence they are a good starting point for a campaign.

SALESMEN

A Salesman is a person with a strong knack for <u>**persuasion**</u> in the category. Salesman are individuals who like to persuade their environment of products pros and cons. They are likely to <u>**convince others**</u> about their opinions.

MAVENS

Mavens has the deepest <u>**knowledge**</u> in the category and who could give a large amount of <u>**information**</u> about a product. They search for information and are happy to share of their superior knowledge. They are helpful and a good source if you need good advice.

CHAMPIONS

These are people who falls into all the above-mentioned segments. Hence, they are a group that <u>**talk to many**</u> different people, could give a large amount of <u>**information**</u>, and are likely to <u>**convince others**</u> about their opinions.

6. Diffusion and Adopters

Categorization of consumers based on innovativeness

Background

In addition to the Word of Mouth segmentation we have made a general innovation model to identify different categories of adopters.

The model is constructed from questions about how often the respondents *search for information about new products and services*, *look out for new things* and their *willingness to try things before their friends*.

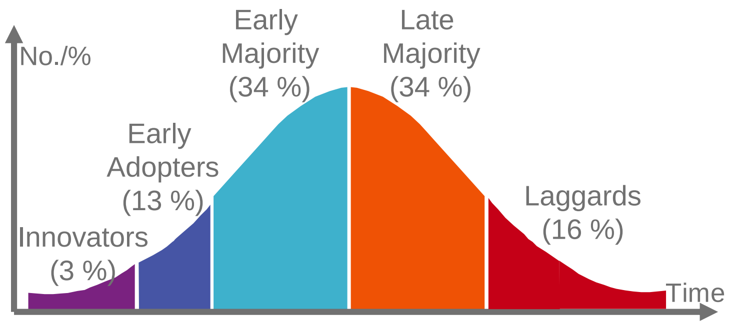
The model divides the population into five different *Adoption Groups* with predefined sizes given from the “Diffusions of Innovations” theory*:*

- Innovators (3 %)
- Early Adopters (13 %)
- Early Majority (34 %)
- Late Majority (34 %)
- Laggards (16 %)

Adoption Curve

Derived from *“Diffusions of Innovations”,* Everett Rodgers, 1962.

According to this established theory, the criterion for the adopter categorization is innovativeness, defined as the degree to which an individual adopts a new idea.



Diffusion and adoption theory

Diffusion of innovations is a theory that seeks to explain *how*, *why*, and *at what rate* **new ideas** and technology **spread**. Everett Rogers, a professor of communication studies, popularized the theory in his book Diffusion of Innovations; the book was first published in 1962.

Rogers argues that diffusion is the process by which an innovation is communicated over time among the participants in a social system.

Rogers proposes that four main elements influence the spread of a new idea: *the innovation itself*, *communication channels*, *time*, and a *social system*.

This process relies heavily on human capital. The innovation must be widely adopted in order to self-sustain. Within the rate of adoption, there is a point at which an innovation reaches **critical mass**.

Source: Wikipedia

7. Media Consumption

A topline view of media consumption

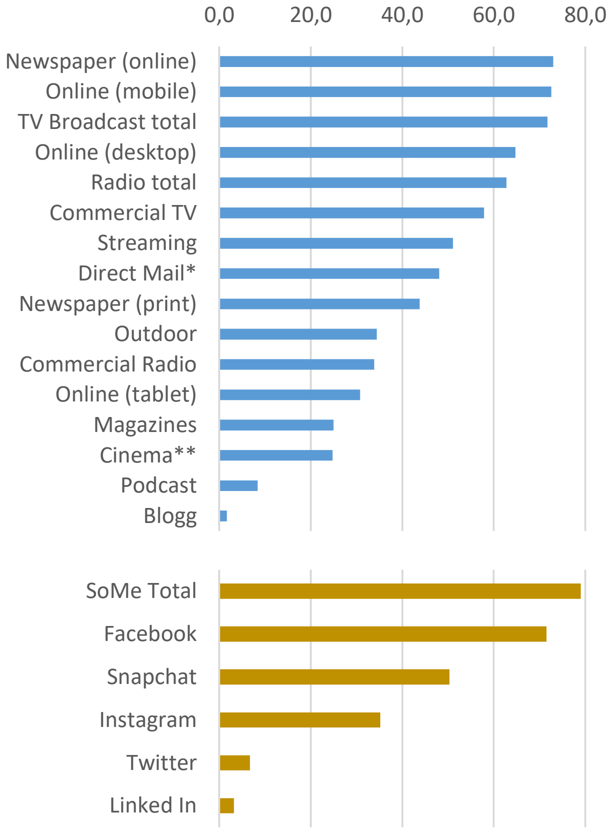
FORBRUKER & MEDIA

Background and media measurement

There are many different media titles being measured in Consumer & Media for all media channels

- TV, radio, newspapers, online newspapers, magazines, web magazines, other online sites, streaming services, social media, direct mail, outdoor, cinema and more
- The individual media brands we measure spans from national through regional to local.
- Most media we measure are computed for media planning/scheduling purposes – down to specific titles. For analytical purposes and target group insights we have constructed two types of aggregated media indexes; 1) Daily reach, and 2) Heavy-Medium-Light usage.
- Both can be used for better understanding of a target group's use of different media channels in addition to other characteristics.

Daily reach



Heavy – Medium – Light users

- Categorization of users of a media channel into three approximate equally split groups
- Based on media usage questions we seek to allocate users into three equally split groups; 1/3 light, 1/3 medium and 1/3 heavy users

Media consumption comparison	Total population (%)			Age 15-29 Affinity Index		
	Low	Medium	High	Low	Medium	High
TV	32	33	36	205	76	28
Radio	32	33	35	172	89	45
Newspaper	32	33	35	160	99	47
Magazines	31	34	35	171	88	48
Internet	33	32	35	47	120	131
Streaming	36	33	30	14	99	204
Cinema	31	37	32	34	109	155

KANTAR

3.

Marketing models within Consumer & Media (TGI Norway)

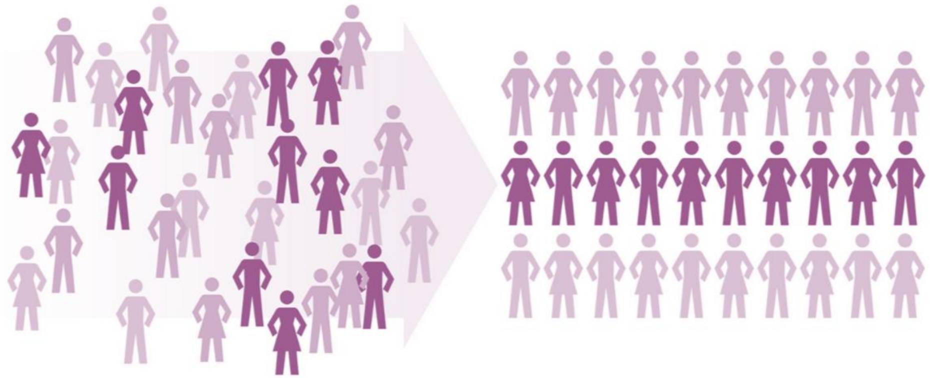
Marketing models within TGI Norway

Different solutions for market overview, identifying market challenges and classification of consumers

The software Galileo contains all the C&M data, including different market insight tools for analysis purposes.

The different marketing models are:

1. Market Map
2. Communication Map
3. Push Pull



Applications:
Identify and describe target groups, develop communication strategies and perform media planning.

Market map

Identifies the unsolved communication tasks for a brand (fmcg and other short-term goods)

The Market Map divides consumers of fmcg, short term goods and shops into groups based on their awareness and experience with a particular brand. The model was an invention by the Norwegian Otto Ottesen in 1977 who then worked as a professor at Copenhagen Business School.

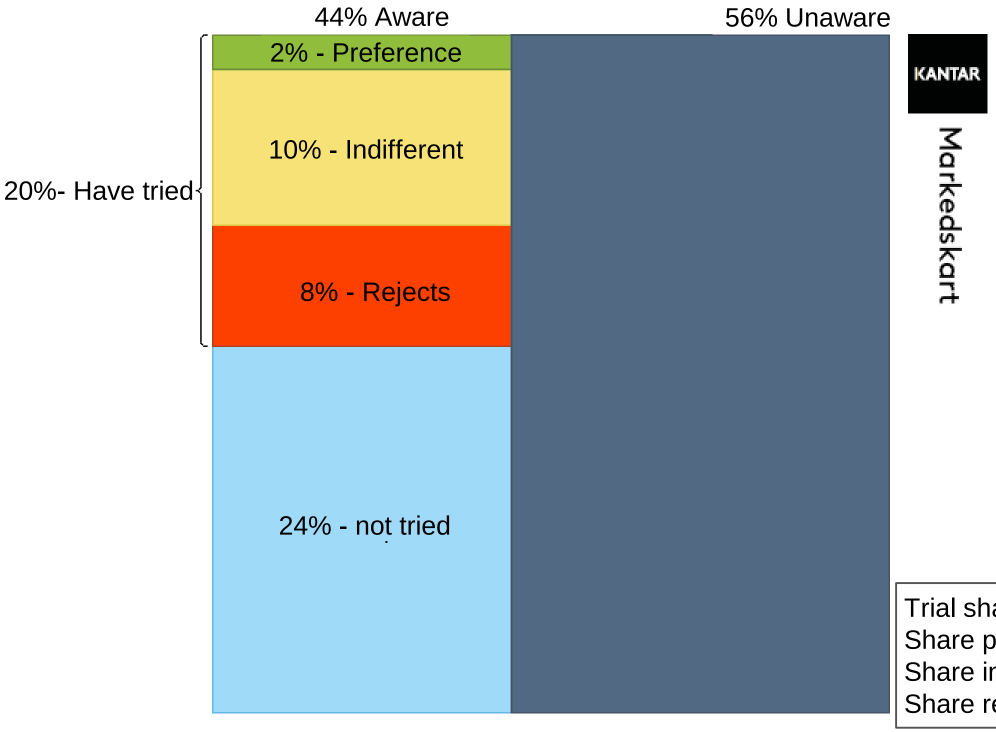
The map builds on the simple assumption that a brand needs to be known to consumers, tried and a preferred choice for customers to become loyal. Brand awareness and rial are the starting points. Then it is central to know how consumers perceive the brand. The map helps marketeers to detect which areas to focus on to stimulate brand growth.

Input variables for The Market Map:

- Brand Awareness
- Trial
- Evaluation (preference, indifferent or rejection)

Forbruker & Media '19/2 - NOVEMBER(19) - MGI
Nedbrytning: Hele befolkningen/100,0% 4 205,704 (13 845)
Målgruppe: Hele befolkningen (4 205,704 / 100,0% / 13 845 resp.)

BRAND: Oatly (milk oatdrink)



Trial share: 46%
Share preference: 12%
Share indifferent: 50%
Share rejection: 39%

Communication map

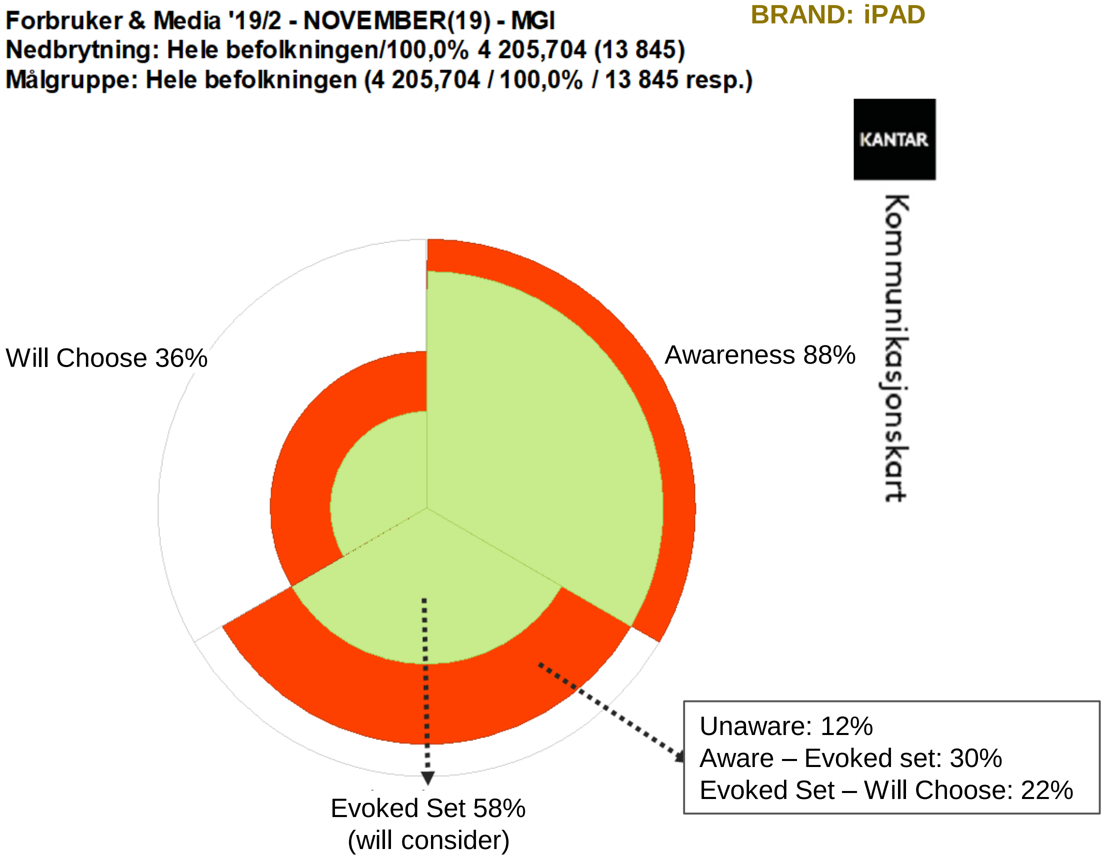
Identifies the unsolved communication tasks for a brand (durables/capital goods)

The Communication Map divides consumers of durables and capital goods into groups based on their awareness and evaluation of a particular brand.

For durables we usually do not see repetitive repurchase. A consumers own experience are therefore quite limited. Information about brand consciousness and if it is part of a consumers evoked set are of vital importance for a marketeer. It is vital for a marketeer to have a clear picture of this context in order to put in place an effective communication strategy.

The model breaks down the path to purchase from brand awareness, via brand consideration, to purchase intention. The input variables for The Market Map are:

- Brand Awareness
- Evoked set (consideration set)
- Will choose (purchase intention)



Push/Pull

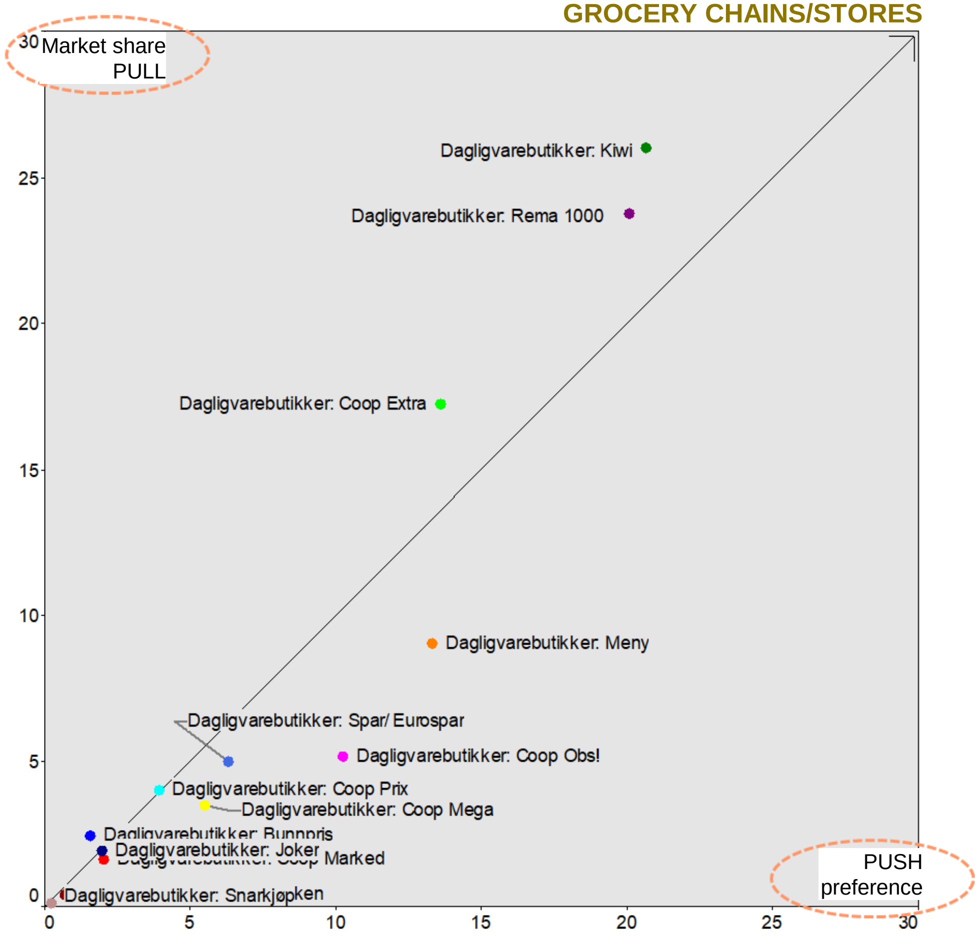
Looks at the relation between market share vs. purchase intention or brand preference

The Push/Pull analysis puts the attention towards the distance between *purchase intention or brand preference* and the *market share* of different brands in a category. Hence we can also see the relative position for brands in a product category.

In TGI the *purchase intention* or *brand preference* represent the PULL axis of the graphic. *Market share* (measured as «brand last bought» or «brand use most often») represents the PUSH axis.

- **Push position**: A brand positioned above the 45-degree diagonal line has a market share that is not reflected in the underlying purchase intention or brand preference. A typical price leader will have such a position. The position can be vulnerable IF a brand is challenged on it's price and/or distribution advantage.
- **Pull position**: A brand positioned below the 45-degree diagonal line has a purchase intention or brand preference that is higher than the acquired market share. Typically this is the position for *premium brands* that often are able to charge a higher price than other brands.

GROCERY CHAINS/STORES



About Kantar

Our mission is to make our clients smarter. We believe that well-thought out and fact-based decisions win over decisions made by pure gut feeling. That's why we have studied the Norwegian market since 1946, and helped our clients make well-informed decisions, based on what really happens in their market.

Kantar is the world's leading evidence-based insights and consulting 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, our innovative analytics and technology, we help our clients understand people and inspire growth.

In total we are over 30.000 engaged employees worldwide, where 120 are based in Norway. In Norway our fieldwork organization of Norsk Gallup Institutt AS are a 100% owned subsidiary of Kantar.

KANTAR

Syndicated media surveys from Kantar

Norway

CONSUMER & MEDIA

TVOV MEASUREMENT (TV CURRENCY)

24 – THE MEDIA DIARY

INTERBUS (Digital trends TGI)

SOCIAL MEDIA TRACKER

MEDIA YOUTH

NEWSPAPER READERSHIP (NRS)

IMAGAZINE READERSHIP (NRS)

PROFESSIONAL PRESS

FUNCTIONALITY OF MEDIA AND CHANNEL USAGE

HOUSEHOLDS MEDIA COSTS

MEDIA CHILDREN

Understand People
Inspire Growth