KANTAR

INSIGHTS-INTELLIGENCE 2030

FROM INSIGHTS TO INTELLIGENCE 2030

A new playbook to power people-centric growth

August 2026

EXECUTIVE SUMMARY

MORE DATA. LESS CERTAINTY.

ORGANISATIONS ARE ENTERING A NEW GROWTH ERA.

Businesses are grappling with more data, more AI and more signals, but not always more certainty. The advantage now belongs to teams that can turn information into intelligence: clearer priorities, faster decisions and sharper action across their business.

The challenge facing organisations has changed. The businesses that outperform over the next decade will not necessarily be those with the biggest technology stack or the largest data lake. They will be the organisations best able to transform information into intelligence: turning complexity into clearer commercial decisions.

This is the central argument of 'Insights to Intelligence 2030': growth will increasingly depend on the ability to connect human judgement with machine capability, to make better decisions, faster and more consistently.

The research points to two major forces reshaping marketing and brand building:

— Demand fragmentation.

— AI-mediated journeys.

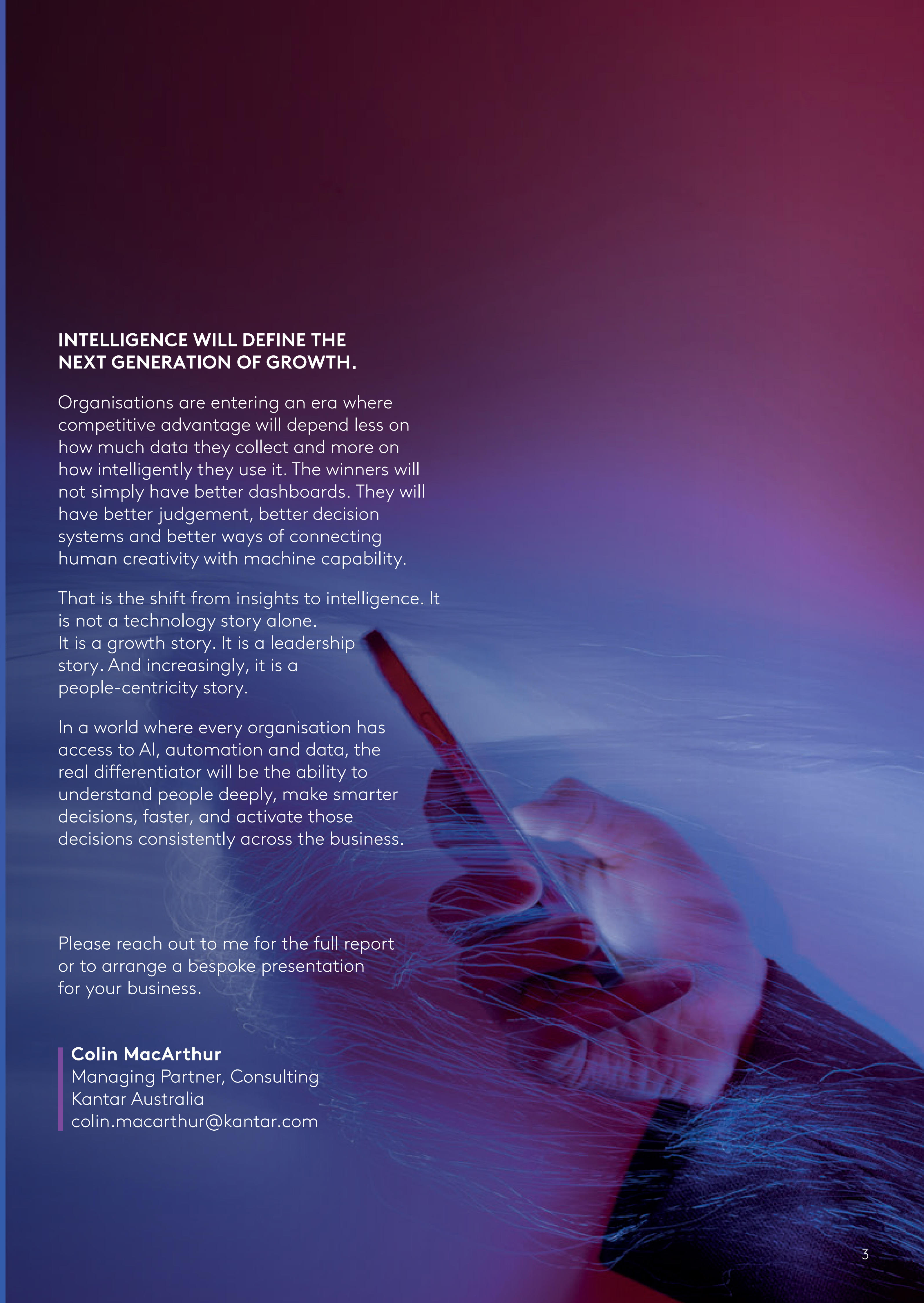
Demand is splitting into smaller, faster-moving, culturally and contextually distinct clusters. At the same time, AI is beginning to shape how people discover, evaluate and choose brands, often before they click, search or enter a store.

TOGETHER, THESE FORCES REWRITE THE MARKETING PLAYBOOK.

Brands must still be meaningful, different and salient to people. But increasingly, they must also be discoverable, understandable and useful to intelligent systems. People-centricity does not disappear in this world. It becomes more important, and harder to deliver.

The shift required is from insights to intelligence. Insights explain. Intelligence guides. It helps leaders prioritise, decide, experiment and act. It connects human empathy, commercial judgement and strategic intuition with AI-enabled speed, scale and pattern recognition. It is not about replacing marketers, insights teams or strategists with machines. It is about building a symbiotic intelligence ecosystem where humans and AI amplify each other's strengths.

> **The biggest risk is not AI. The biggest risk is organisations keeping decision models designed for a pre-AI world.**



INTELLIGENCE WILL DEFINE THE NEXT GENERATION OF GROWTH.

Organisations are entering an era where competitive advantage will depend less on how much data they collect and more on how intelligently they use it. The winners will not simply have better dashboards. They will have better judgement, better decision systems and better ways of connecting human creativity with machine capability.

That is the shift from insights to intelligence. It is not a technology story alone. It is a growth story. It is a leadership story. And increasingly, it is a people-centricity story.

In a world where every organisation has access to AI, automation and data, the real differentiator will be the ability to understand people deeply, make smarter decisions, faster, and activate those decisions consistently across the business.

Please reach out to me for the full report or to arrange a bespoke presentation for your business.

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THE NEXT COMPETITIVE ADVANTAGE IS DECISION QUALITY.

The organisations growing fastest aren't collecting more data. They're combining human understanding with AI-powered intelligence to make better decisions. The challenge is turning intelligence into action.

PEOPLE-CENTRICITY DRIVES GROWTH

Organisations that put people at the centre consistently outperform their competitors.

1.

DEMAND IS FRAGMENTING

People's needs, behaviours and expectations are becoming more diverse and harder to predict.

2.

AI IS RESHAPING CHOICE

AI is increasingly influencing how people discover, evaluate and choose brands.

3.

HUMAN + AI IS THE NEW ADVANTAGE

The future belongs to organisations that combine human empathy, creativity and judgement with AI's speed, scale and intelligence.

4.

THE NEW GROWTH EQUATION

HUMAN EMPATHY + MEANINGFUL DATA + AI-POWERED INTELLIGENCE

Smarter Decisions. Stronger Growth.

CONTENT

THANK YOU TO OUR TEAM AND PARTNERS

This work has been developed with input and collaboration from senior leaders and partner organisations including Google, HSBC, Danone, Mondelēz and Carlsberg. Very special acknowledgements to the report author Karel d'Hond and the entire Consulting team who contributed to this project.

HOW TO USE THIS PLAYBOOK

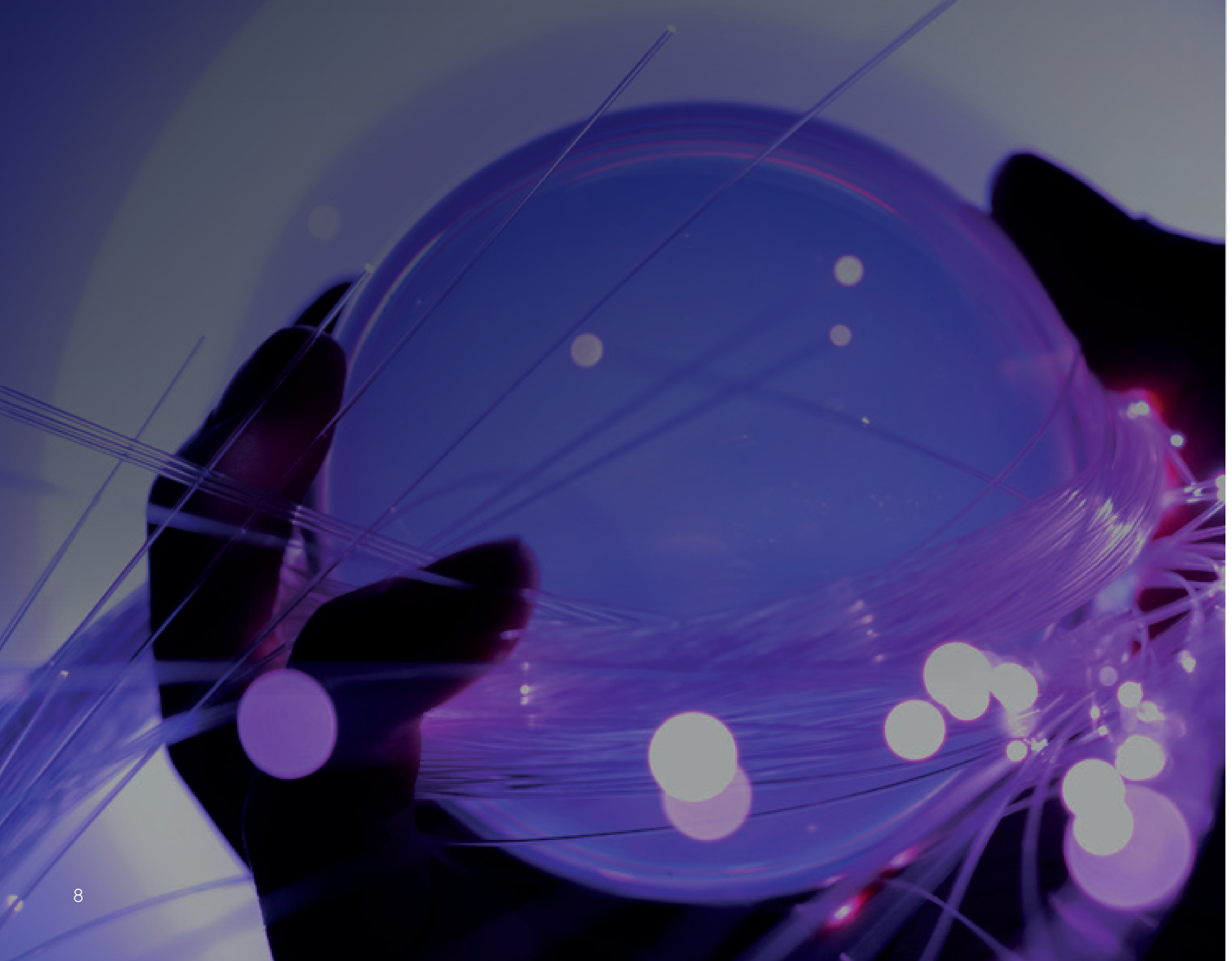
Treat each section as a decision lens. Start with the forces reshaping growth, use the future-readiness drivers to diagnose capability gaps, then apply the checklist at the end to decide what to automate, what to augment and where human judgement must stay firmly in the lead.

METHODOLOGY

INSIGHTS TO INTELLIGENCE 2030 DRAWS ON FOUR INPUTS:

- A benchmarking update across more than 4,000 businesses globally
- 70+ in-depth interviews with global business and C-suite leaders
- An intelligence rewind of related industry publications and work since Insights 2030 was released in 2021 (dissected by sector)
- Three advisory board sessions supported by client case studies.

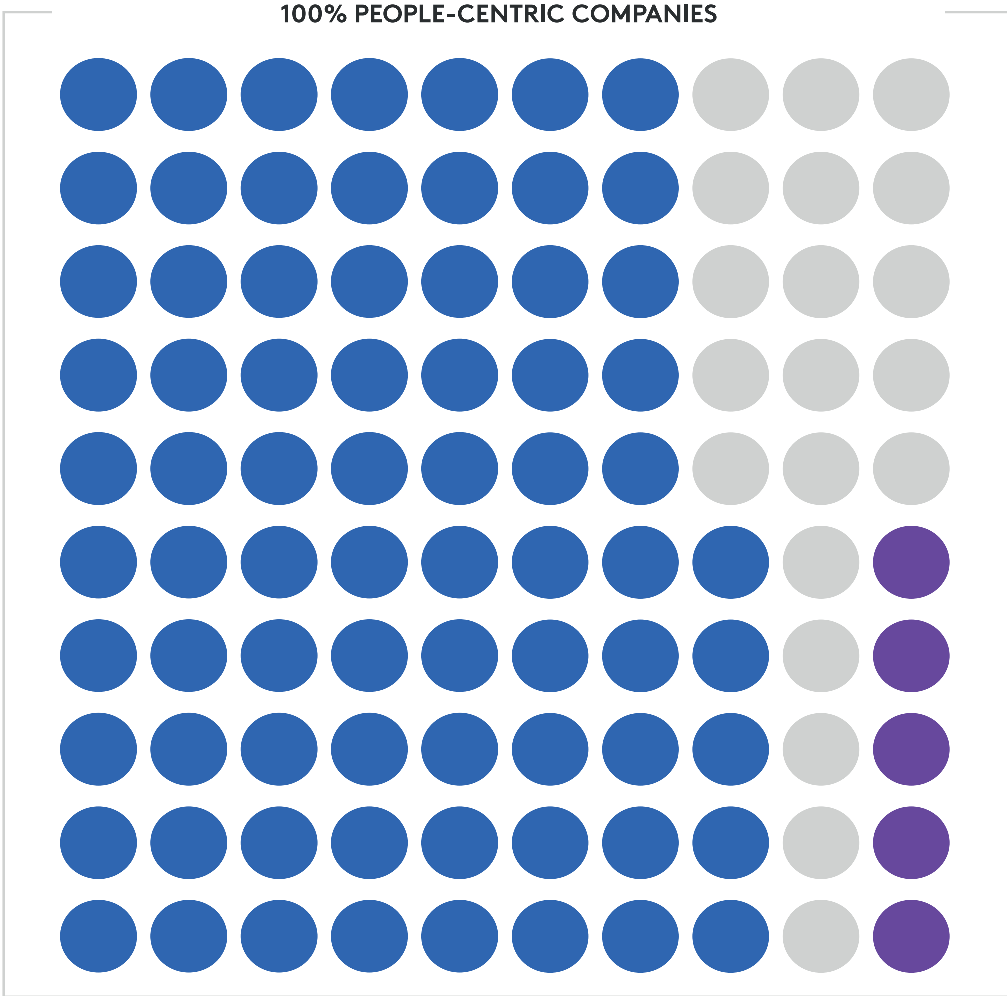
This is not simply a trend report. It is a recalibration of the insights operating system, grounded in how leading organisations are already evolving.



01.WHY PEOPLE-CENTRICITY STILL WINS.

PEOPLE-CENTRICITY REMAINS ONE OF THE CLEAREST PREDICTORS OF GROWTH:

People-centric companies are 15 times more likely to lead on revenue growth than their competitors. But people-centricity is no longer simply about 'knowing the customer'. It now means understanding how people, markets and AI interact to shape demand, and looking beyond shopping behaviour to people's values, pressures, contexts, needs, aspirations and decision environments.



75% Leading companies (in terms of revenue growth)

5% Lagging companies (in terms of revenue growth)

People-centricity: *Deliberately and consistently placing the needs, experiences, and perspectives of your customers and consumers at the core of your organisation's decisions, designs, and processes.*

PEOPLE-CENTRICITY INDEX: 2021 VS 2025

People-centricity means deliberately and consistently placing the needs, experiences and perspectives of customers and consumers at the core of an organisation's decisions, designs and processes. Yet, our research also shows that people-centricity is becoming more of a differentiator, not less.

The gap is widening. Winning organisations are maintaining their focus on people while the average organisation is slipping backwards. For marketers, that creates a clear opportunity: the more complex the market becomes, the more valuable genuine human understanding becomes.

THE MARKETER'S IMPLICATION

People-centricity is a growth capability. And in an AI-mediated world, it must evolve from customer understanding into demand intelligence: a sharper understanding of people, markets, machines and the systems that connect them.

02. THE TWO FORCES REWRITING BRAND GROWTH.

Global business leaders point to two dominant forces changing the future of marketing and brand building.

FORCE ONE: DEMAND FRAGMENTATION

Demand is fragmenting into smaller, faster moving and more culturally distinct pockets. Societal polarisation and value fragmentation (88%), economic volatility (86%), and shifts in government policy and regulation (83%) are all making demand harder to predict and serve at scale.

We see two possible demand futures:

— Global convergent demand continues: people remain more polarised and personalised than today, but still choose from a shared set of brands, with decisions driven by value, ease and scale.

— The 'great fragmentation' takes hold: demand splits into distinct clusters shaped by geopolitical, cultural, ideological and technological forces, making brand choice less substitutable and rejection more likely.

The practical implication is that scale alone is no longer enough. Growth depends on knowing which demand spaces matter, where the brand has permission to play, and how relevance shifts across cultures, occasions, communities and contexts.

FORCE TWO: AI-MEDIATED JOURNEYS

From fragmentation of channels and attention (82%) to algorithmic choice filtering and automated purchasing (81%), AI-led search and agents are transforming how consumers discover and choose brands.

Here we also see two possible futures:

— 'Human First' where humans still make 80% of purchase decisions with much more AI assistance.

— 'Agent First' where AI makes 80% of purchase decisions while humans reserve attention for high-value/passion categories.

The exact balance will differ by category and market. But the direction is clear: AI will increasingly influence discovery, evaluation and choice. That shifts the job of marketing from persuasion alone to usefulness, clarity and consistency across both human and machine decision environments.

FOUR UNIVERSAL IMPLICATIONS FOR BRAND-LED GROWTH

1. Prioritise clarity and differentiation

Powerful brands continue to dominate the marketplace through clarity and differentiation of offer.

2. Predisposing human and machine minds

Usage of AI assistants will continue to grow, which requires predisposing human and machine minds to drive discovery and choice.

3. Reach diverse channels, occasions and demand clusters

Brands must deliver tailored products, experiences, and comms to maximise reach across diverse occasions and demand clusters.

4. Drive more impact with limited available resources

With budgets being rebalanced across organisations, there is pressure to achieve more impact with available resources.

THE MARKETER'S IMPLICATION

The future of brand growth will be won by brands that are clear enough for people to understand, distinctive enough for markets to value, and structured enough for AI systems to find, interpret and recommend.

03. THE NEW INTELLIGENCE OPERATING SYSTEM

The way to build people-centricity has evolved and requires a shift across four dimensions:

— From long-term strategies and activations to planning within change and anticipating volatile futures to drive long-term growth.

— From understanding behaviours and choice drivers of people and markets to understanding how people, markets and AI shape demand.

— From a full-service insights function guiding all decisions to automated intelligence pipelines with tiered involvement, focused on priority decisions.

— From strong AI application across individual use cases to redefined workflows where humans and AI work together, with handoffs and guardrails.

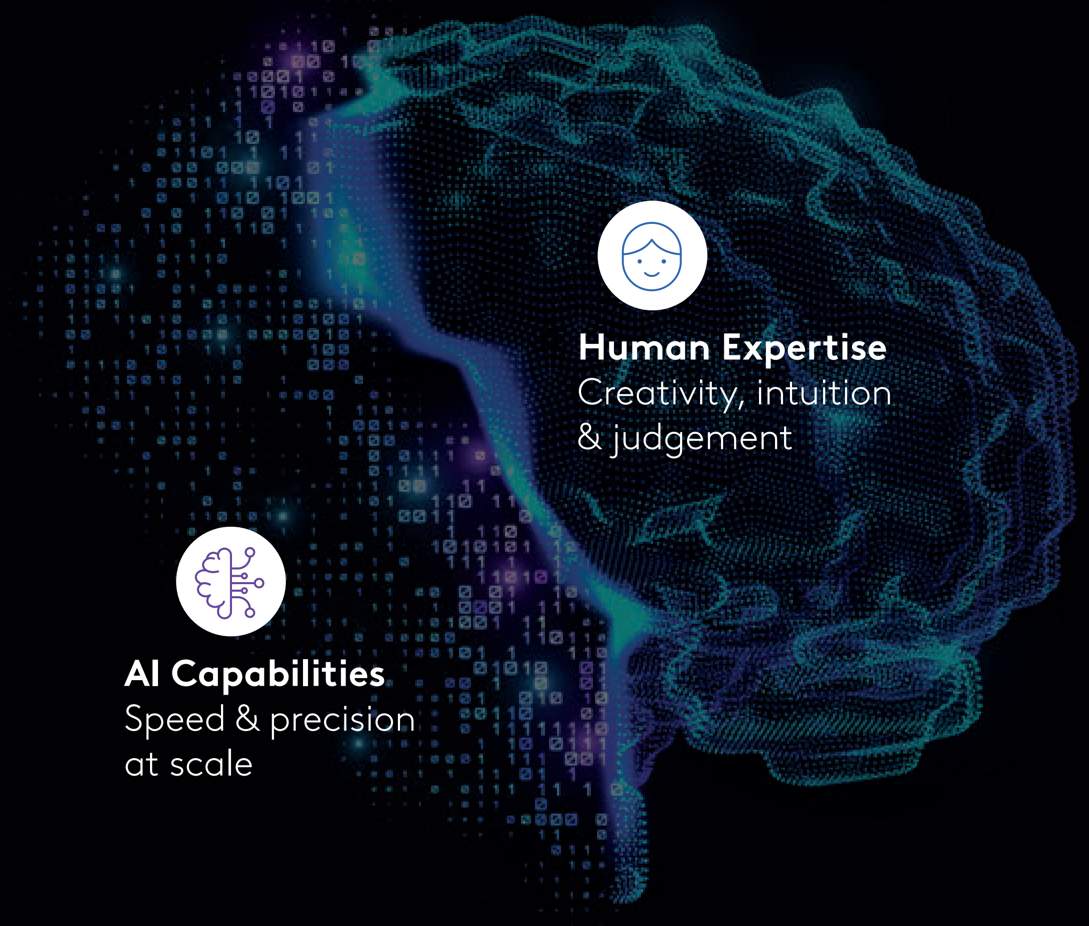
This is a major operating model shift. The future is something to be continuously sensed, interpreted, tested and acted upon.

THE SYMBIOTIC INTELLIGENCE ECOSYSTEM

We're moving from retrospective insight to anticipatory intelligence. This is an important progression. Retrospective intelligence connects the dots while interpretive intelligence enriches the view. Anticipatory intelligence helps organisations navigate the future and create bigger impact.

Growth leaders must now step up as architects of a symbiotic ecosystem where insights and intelligence feed into end-to-end processes at scale.

Symbiosis is a cooperative, mutually beneficial partnership between distinct entities, and applies this to the human-AI relationship: two different intelligences working together so that each amplifies the other's strengths. Humans bring creativity, intuition and judgement. AI brings speed and precision at scale. The advantage comes from designing how the two work together, not from assuming one replaces the other.



There are three types of intelligence capability:

— **Human-control capabilities** where generalists guide business decisions through human intelligence and verified AI signals.

— **Hybrid capabilities** where democratised data and agents provide intelligence to all, with the most impactful decisions guided by intelligence generalists.

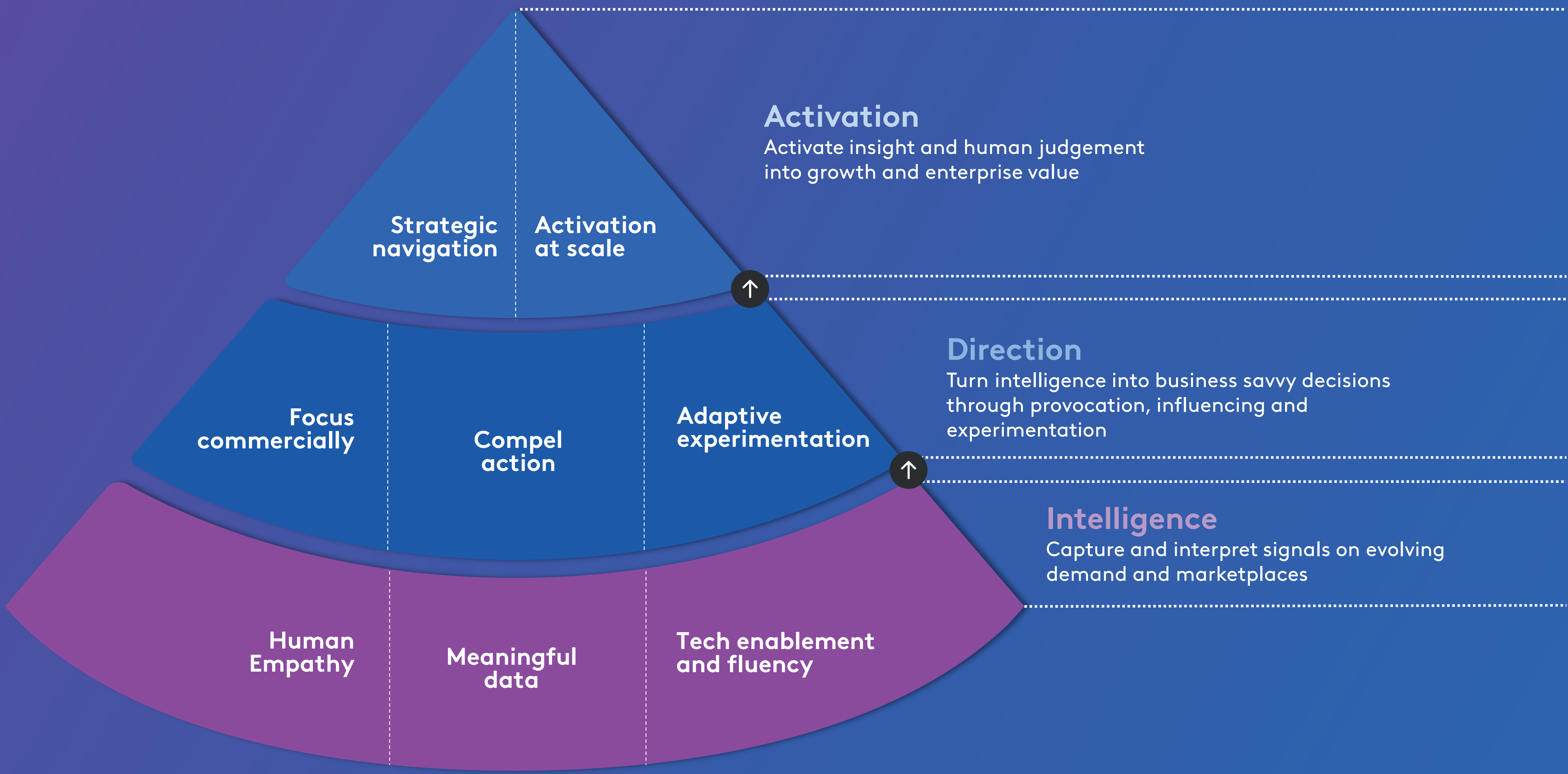
— **Automated capabilitie**s where intelligence comes from democratised data and agents, with anomalies receiving minimal attention from generalists.

THE MARKETER'S IMPLICATION

The next advantage is not simply having AI tools. It is knowing what to automate, what to augment and where human judgement must remain decisive.

04. THE EIGHT FUTURE-READINESS DRIVERS

To be future-ready, organisations need to optimise eight organisational drivers across three layers: intelligence, direction and activation.



1. Human empathy

> **Our role will always be to anticipate and humanise decision making.**
>
> Senior Global Business Leader

Human empathy combines empathy, intuition and creative thinking to uncover what truly matters in context. Leading companies score higher than the market average on empathy and human understanding. They also score higher on basing everything on a clear understanding of customer and consumer needs. This driver is about understanding the human experience, not just the shopping experience. It requires curiosity, compassion and the ability to turn data into genuine human understanding.

Insights at my company does well in terms of...
(top 2 box)

	Leading Companies	Market avg
Empathy and human understanding	89%	82%
Basing everything on a clear understanding of customer/consumer needs	88%	79%

vs previous benchmark*

	Leading Companies	Market avg
Basing everything on a clear understanding of customer/consumer needs	78%	70%

PLAYBOOK ACTION:

Build insight work around lived context, not only stated behaviour. Ask what people are trying to achieve, what tensions they are navigating and what trade-offs shape their choices.

2. Meaningful data

> **There's a huge opportunity to triangulate multiple data sets. That layering is where insights come from.**
>
> Senior Global Business Leader

Meaningful data means bringing together robust, composite data and signals at the speed of change to make sense of the market. Leading companies outperform the market average on linking different data sources to distil insights and are also more likely to regard sources such as regulatory and compliance intelligence, social and digital media analysis, real-time foresight and scenario engines, static trends and future scenario analysis, and advanced simulation and synthetic research as important for business decision-making. It is not about the volume of data, but the meaningfulness of data. Organisations need access to varied, high-quality data sources across qualitative, quantitative, bought, owned, earned, past, present and future signals, aligned with critical business questions.

Insights at my company does well at **linking different data sources to distill insights**

75% Leading Companies

58% Market avg

Important sources for business decision making

	Leading Companies	Market avg
Regulatory & compliance intelligence	73%	54%
Social and digital media analysis	71%	53%
Real time foresight & scenario engines	69%	47%
Static trends and future scenario analysis	68%	52%
Advanced simulation & synthetic research	62%	37%

PLAYBOOK ACTION:

Stop treating data integration as a technical project. Treat it as a decision-quality project. Start with the commercial question, then determine which data sources are needed to answer it.

3. Tech enablement and fluency

> **The responsibility of the insights function is to embrace AI, use the right capabilities, data sets and tools, and ensure AI is trustworthy and gets to the right business outputs.**

Senior Global Business Leader

Tech fluency and enablement means steering an integrated set of tools, agents and platforms with human judgement to surface timely insights. The data shows that leading companies outperform the market average on leveraging AI to enhance insights and human understanding. They also outperform on using AI and machine learning tools.

My company does well at **leveraging AI to enhance insights and human understanding.**

43% Leading Companies

21% Market avg

Insights at my company does well at **using AI and machine learning tools.**

52% Leading Companies

29% Market avg

PLAYBOOK ACTION:

Build fluency, not just access. Teams need to understand what AI can support, where it may mislead and when human judgement must intervene.

4. Focus commercially

> **The credibility to be provocative begins with commercial focus. Insights must connect to the P&L, not only to communications, innovation or consumer sentiment.**

Senior Global Business Leader

Focusing commercially means prioritising analysis and initiatives towards decisions and growth bets that drive business impact. Leading companies outperform the market average on business acumen and P&L understanding. Nine in ten leading companies agree people-centricity drives business growth, compared with 84% of the market average.

Agree that **people-centricity** drives **business growth:**

89% Leading Companies

84% Market avg

Insights at my company does well at **business acumen and P&L understanding.**

72% Leading Companies

56% Market avg

PLAYBOOK ACTION:

Anchor every major insight recommendation in a commercial decision. What growth bet does it inform? What trade-off does it clarify? What revenue, margin, risk or investment decision does it improve?

5. Compel action

> **Business leaders must answer three questions for any insight: who are we trying to influence, how do they decide today, and why will this change their behaviour?**

Senior Global Business Leader

Compelling action means challenging assumptions, telling compelling stories and influencing humans and AI systems to drive better decisions. Leading companies outperform the market average on including insights at the centre of decision-making and outperforming on storytelling and influencing. The ability to turn ideas into narratives that compel action is a core competency.

My company does well at **including insights at the centre of decision making**

88% Leading Companies

76% Market avg

Insights at my company do well at **storytelling and influencing.**

73% Leading Companies

59% Market avg

PLAYBOOK ACTION:

Treat every insight output as an intervention. Define the decision-maker, the current belief, the desired shift and the action required.

6. Adaptive experimentation

> **AI tools are always changing, and that an experimental mindset is critical when using AI in real time to answer questions, test ideas and explore new possibilities while staying adaptable.**

Senior Global Business Leader

Adaptive experimentation means experimenting, embracing smart risk, continuously learning and staying curious in a fast-changing world. Leading companies outperform the market average on embracing risk and experimentation, and on taking risks to capture big opportunities. Experimentation is the courage to voice unpopular conclusions and findings.

My company does well at **answering key business questions through creative solutions**

83% Leading Companies

75% Market avg

Insights at my company does well at...
(top 2 box)

	Leading Companies	Market avg
Embracing risk and experimentation	73%	58%
Taking risks to capture big opportunities	74%	55%

PLAYBOOK ACTION:

Move from research as validation to intelligence as learning infrastructure. Build test-and-learn loops around the decisions that matter most.

7. Strategic navigation

> **We need to lean further into strategy, as operational insights will increasingly be done by machines. The more we consider ourselves strategists, the better we will be.**
>
> Senior Global Business Leader

Strategic navigation means proactively shaping growth, direction and strategy through deep insight into people, markets and futures. Real-time foresight and scenario engines are an important source for decision-making for 7 in 10 leading companies. It also lists future marketing and brand-building priorities expected to become more important, including clear strategy and leadership vision for the human + AI future, creating meaningful value for consumers, and understanding and anticipating rapidly changing consumer behaviours and needs. Insights functions at leading companies go beyond advice. They institutionalise consumer insights as the basis for business decision-making, while understanding the brand, business, P&L and strategic trade-offs.

In the next 5 years, I expect the following **Marketing and Brand Building priorities** to become more important:

- 88% Clear strategy and leadership vision for the human + AI future
- 86% Create meaningful value for consumers
- 85% Understand and anticipate rapidly changing consumer behaviours and needs

Real-time foresight and scenario engines are an important source for decision-making in my company

69% Leading Companies

47% Market avg

PLAYBOOK ACTION:

Elevate insights from evidence provider to strategic navigator. The role is not just to report what people said, but to help leaders decide what to do.

8. Activation at scale

> **It's not about one-off projects anymore. It's about building a continual learning environment, so answers are already available when we face business challenges.**
>
> Senior Global Business Leader

Activation at scale means equipping organisations to translate data and insights into action through both human- and AI-led workflows. Leading companies outperform the market average on change leadership, on training people across the organisation in distilling insights, and embedding AI into brand and demand decisions. Activation at scale is a shift from one-off insight projects to a continual learning environment that operates in near real time. Insights should not become a bottleneck or gatekeeper. Human- and AI-led systems should democratise access to insights and embed them directly into everyday decisions.

Insights at my company does well at **change leadership.**

65% Leading Companies

45% Market avg

Insights at my company does well at...
(top 2 box)

	Leading Companies	Market avg
Training people across the organisation in distilling insights	73%	55%
Embedding AI into brand and demand decisions	39%	18%

PLAYBOOK ACTION:

Build systems that make intelligence available in the moments where decisions happen. Scale is not more reports. Scale is better decisions made more often across the organisation.

05. WHERE TO START: BUILDING THE HUMAN + AI LOOP

It is imperative to start with a clear strategy and leadership vision for the human + AI future. This is the top priority for leading companies, alongside encouraging employees to contribute ideas and share best practices for AI adoption. Leading organisations put a razor-sharp people-centric vision and structured approach in place to optimise resources and effort. At Kantar, we are the orchestration partner for organisations: translating AI promise into operating reality, designing decision ecosystems across roles, flows, governance and tools, and embedding intelligence into moments of action.

Three new roles are connecting how humans and AI work together in the loop:

1. In the loop: operating in the moment.
Humans work alongside AI to guide decisions, interrogate outputs and apply judgement where it counts.

2. Over the loop: steward of the system.
Humans hold responsibility for judging anomalies and for the health, integrity and evolution of the intelligence system as a whole.

3. Designing and orchestrating the loop: architects of intelligence.
Humans determine what gets automated, what stays human, where judgement must be applied to AI outputs, and how the system should work.

The research also identifies nine critical skills becoming increasingly important in an AI-dominated environment.

'Planning within change' and anticipating volatile futures to drive long-term growth

- Contextual business understanding and future orientation
- Navigating uncertainty and hypotheses-based recommendation building

Understanding how **people, markets and AI** shape demand

- Perspective on evolving consumer journeys
- Foundational AI understanding

Automated insights pipelines with tiered involvement, focused on priority decisions

Defined processes where humans and AI work together, with handoffs and guardrails

Architects of intelligence

- Designing and orchestrating the Human + AI loop

Over the loop: Steward of the system

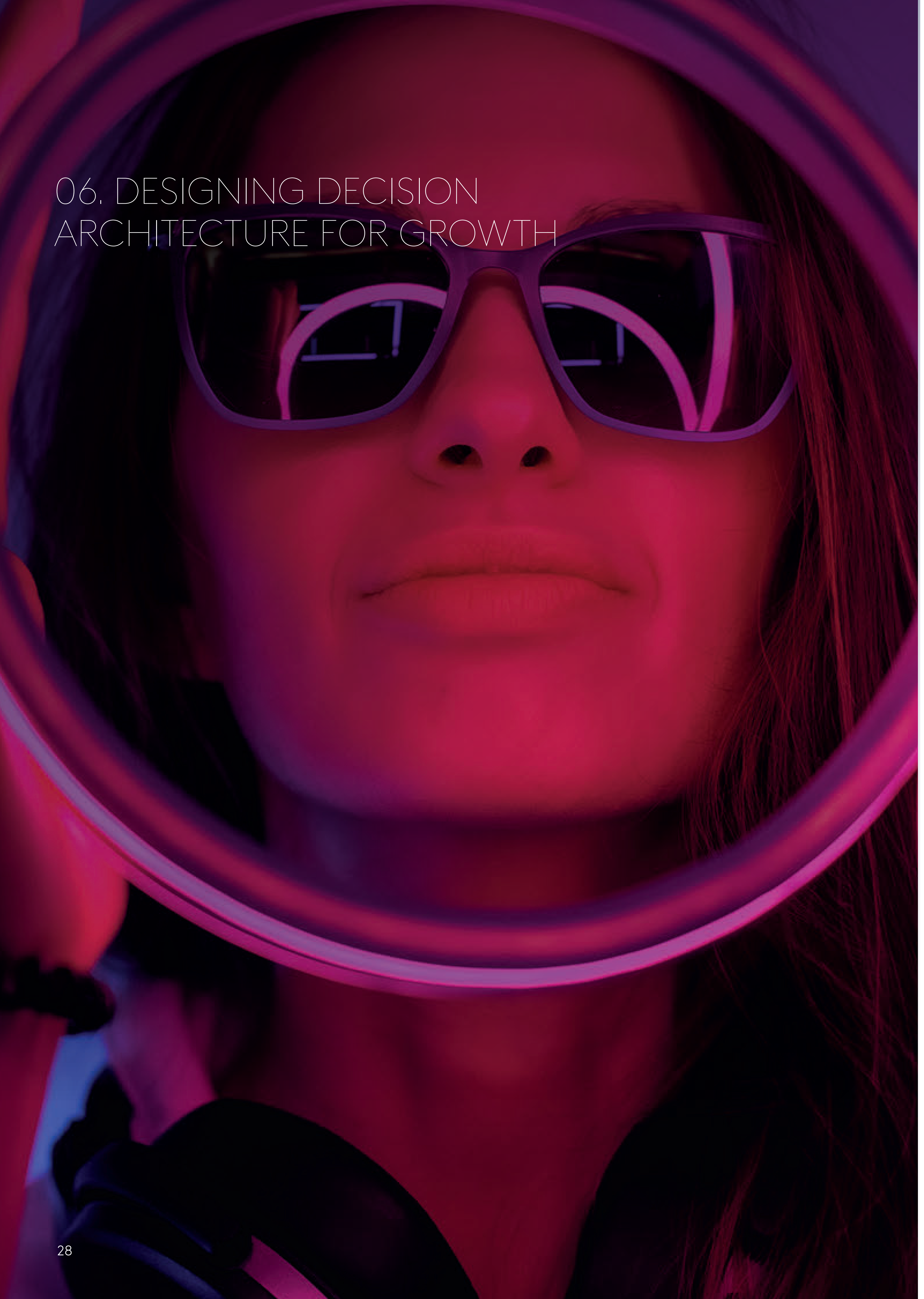
- Systems thinking, AI Stewardship and Governance
- Automated Insights embedding

In the loop: Operating in the Moment

- AI Partnership and orchestration
- Judgement and accuracy accountability

THE MARKETER'S IMPLICATION

The organisations that win will not simply train people to use AI. They will redesign roles, behaviours, skills and workflows around better decision-making.



06. DESIGNING DECISION ARCHITECTURE FOR GROWTH

Growth is driven by decision-making quality and consistent execution across many areas of an organisation, including where-to-play strategy, brand positioning and creative, portfolio and pricing, innovation and renovation, touchpoint engagement, distribution and customer, promotion and activation, and execution and experience.

Depending on the ambiguity and frequency of a decision, more or less can be delegated to AI. High-frequency, low-ambiguity decisions are more suited to AI-led intelligence. Low-frequency, high-ambiguity decisions are more suited to human-led intelligence. Hybrid intelligence sits between these poles.

There are three decision types:

1. AI-led intelligence

AI-led intelligence is suited to decisions where speed, scale, prediction, optimisation and data-driven execution matter most. For example, if a beverage brand runs 100 AI-generated ad variations with the system allocating spend to top performers, decision areas include promotion and activation, and renovation.

2. Hybrid intelligence

Hybrid intelligence is suited to decisions where strategic importance, ambiguity and financial risk require both human and machine input. For example, if a tech company is using AI to suggest improvements for non-core features while humans remain involved on core features, decision areas include touchpoint engagement, distribution and customer, and execution and experience.

3. Human-led intelligence

Human-led intelligence is suited to high-ambiguity, high-stakes decisions that require meaning, judgement, creativity, ethics, relationships and strategic direction from business generalists, supported by verified AI signals. For example, if a consumer health company is defining a three-year entry strategy for an adjacent category, decision areas include where-to-play strategy, portfolio and pricing, big-bet innovation, and brand positioning and creative.

THE MARKETER'S IMPLICATION

Not every decision needs the same intelligence model. The next capability is decision architecture: knowing which decisions should be automated, which should be augmented and which must remain human-led.

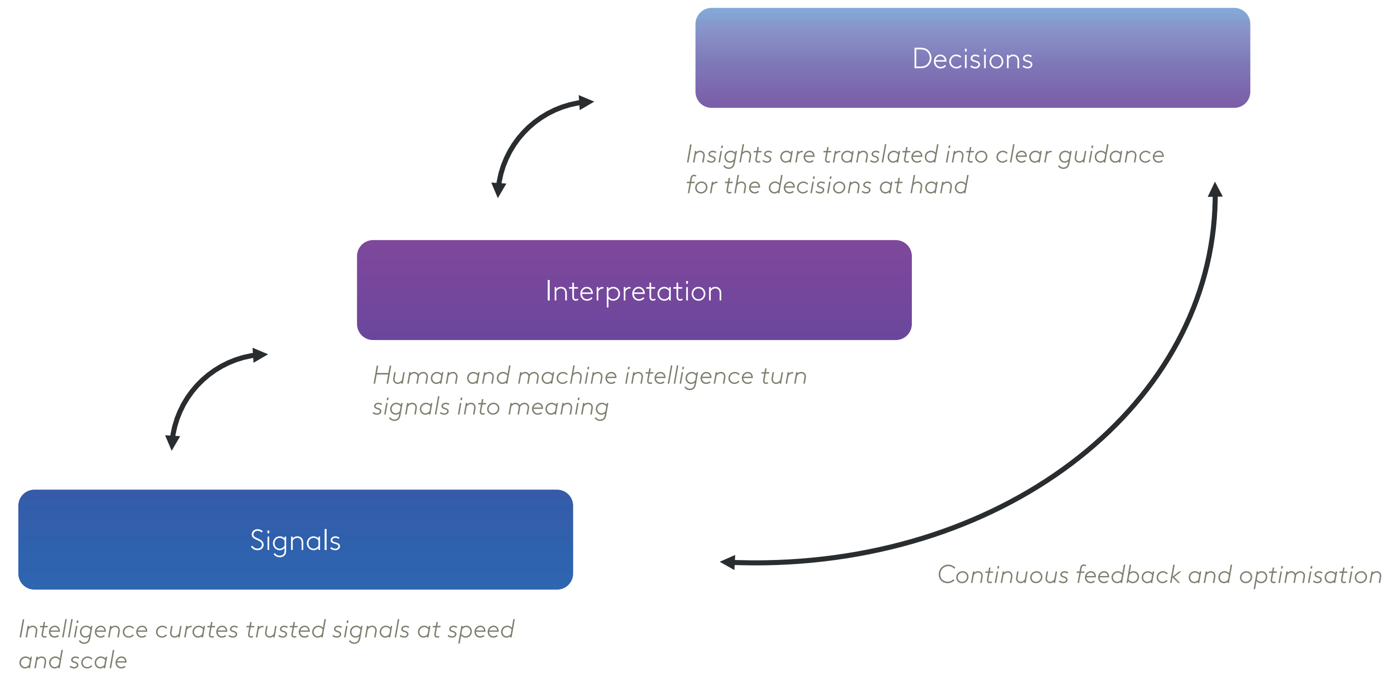
07. THE PLAYBOOK FOR THE NEW GROWTH EQUATION

The success of growth strategy will be determined by how it is grounded in people-centricity, powered by intelligent decisions and activated consistently through connected human-AI workflows. And there are three core components:

- **People-centric:** deliberately and consistently placing customer and consumer needs, experiences and perspectives at the core of decisions, designs and processes.
- **Intelligent decisions:** the ability to transform consumer and market signals into timely and smarter decisions through human-AI enabled workflows.
- **Organisational activation:** holistic execution of strategy connecting capabilities across functional siloes through end-to-end human-AI workflows.

Every decision must be built on strong signals and insights, translated into high-quality decisions and activated consistently across the organisation. Intelligence curates trusted signals at speed and scale. Human and machine intelligence turn signals into meaning. Insights are translated into clear guidance for the decision at hand, with continuous feedback and optimisation.

> **The future belongs to organisations that redesign how decisions are made, not simply how data is managed.**



A PRACTICAL CHECKLIST FOR BUSINESS LEADERS AND MARKETERS

— **Define the decisions that matter most**

Map the growth decisions with the greatest commercial impact: expansion strategy, portfolio and category strategy, brand strategy, innovation, communication, distribution and channel strategy, account management, pricing and revenue growth management.

— **Classify each decision by ambiguity and frequency**

Decide whether each decision should be AI-led, hybrid or human-led based on strategic importance, ambiguity, frequency and risk.

— **Build the signal system**

Bring together meaningful data across human, market, cultural, commercial, regulatory, social, digital, foresight and synthetic sources. The aim is not more data, but better signals aligned to priority decisions.

— **Design the human + AI workflow**

Clarify what AI does, what humans do, where handoffs occur, what gets reviewed and what guardrails are needed.

— **Embed intelligence into moments of action**

Move beyond one-off projects and static dashboards. Build a continual learning environment where answers are available when business challenges arise.

— **Build the new skills**

Develop future-facing capabilities across business understanding, AI fluency, hypothesis-led recommendation building, orchestration, judgement, governance, systems thinking and automated insights embedding.

— **Make action the measure of value**

Judge insights not by volume of outputs, but by the quality, speed and consistency of the decisions they improve.

About Kantar

Kantar is the world's leading marketing data and analytics business. We deliver the intelligence needed to power brand growth.

We provide the signals that help organisations act quickly and confidently. We empower brands to make effective marketing decisions based on predictive evidence. And we help them craft powerful growth strategies rooted in the connection between consumers, brands and enterprise value.

All this is powered by our uniquely robust human and synthetic data, our unrivalled IP, our AI-native platform and the team of global brand experts that bring this all together.

www.kantar.com