KANTAR

Three Signals

Behaviours, attitudes and expressions and which one to believe when they disagree

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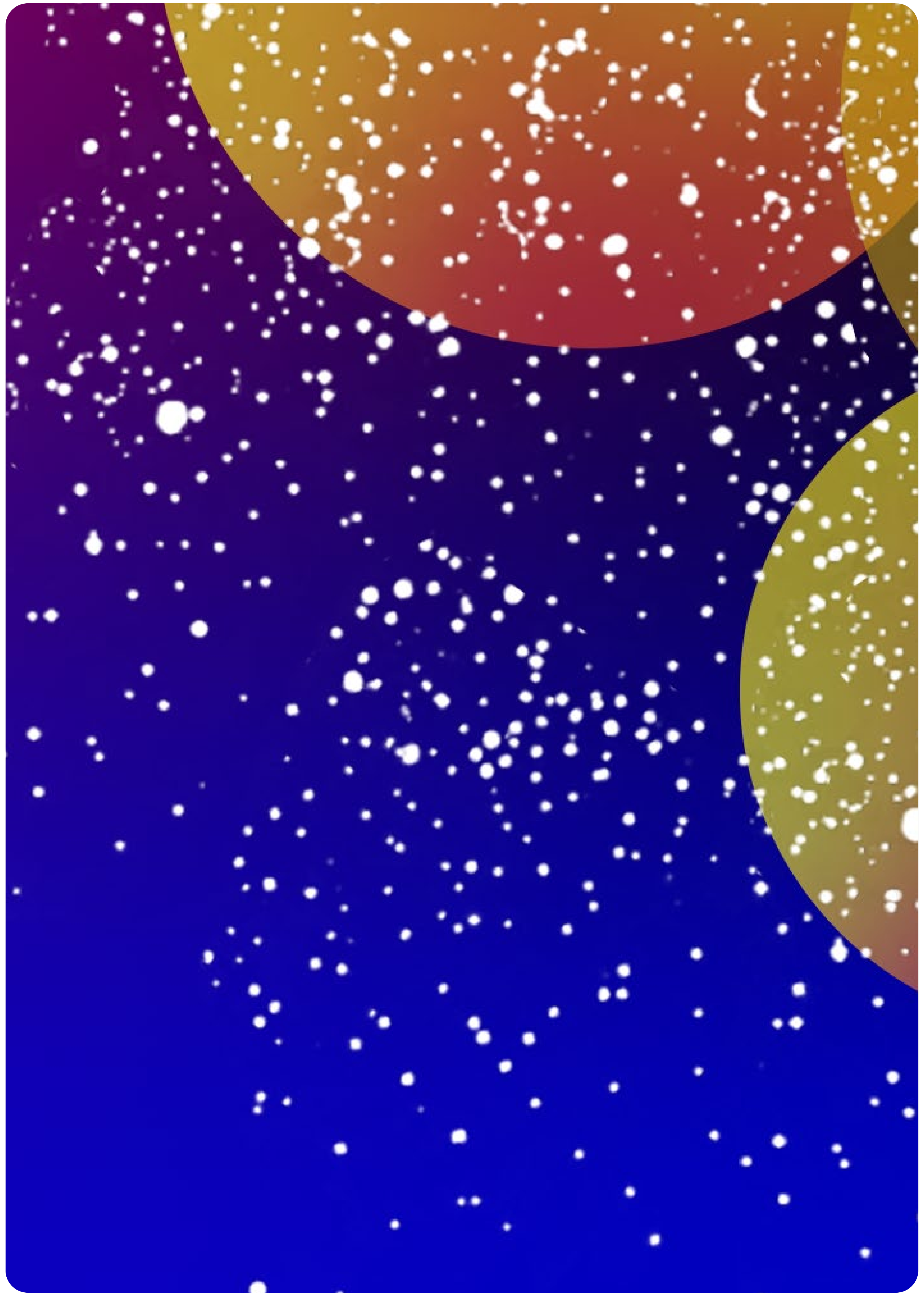
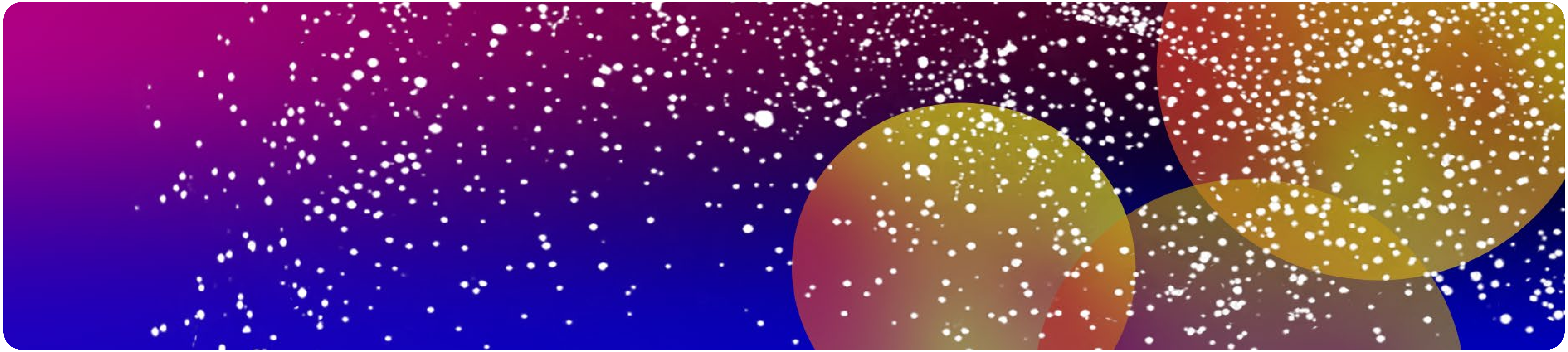




Every CMO we speak to has more data than they know what to do with. Social sentiment, AI recommendations, real-time sales, brand trackers - and the list gets longer every quarter.

So, when the CFO leans across the table and asks, “so what do we do?”, too many marketing leaders find themselves stuck. They’re victims of too much information, unable to separate volume of data from quality of insight, and speed of reporting from clarity of thinking.

This is a guide to getting unstuck. It offers a simple, evidence-backed way to move from signal overload to the confidence to act: which signals predict what, how they relate to each other, when one can stand in for another, and when only human judgement will do. Because what’s remarkable is that for all the new data sources out there, every brand signal still does one of three jobs.

Behaviours tell you what already happened. Attitudes tell you where things are headed. Expressions detect what’s stirring but can’t yet tell you whether it matters.

These haven’t changed in decades. But the sheer number of sources feeding into each one has challenged our ability to tell them apart, and marketers need a way of understanding which signals to read, in what order, and what to do when they disagree.

The difference between behaviours, attitudes and expressions

Each signal reveals something the other two cannot. That's why all three are necessary.

Behaviours are your audit trail.

They capture the choices people actually made: transactions, subscriptions, footfall, repeat purchase, usage, switching patterns. The strength of behavioural data is that nobody will argue with it, a sales number is a sales number. But it's also a limitation: that same number doesn't tell you what's behind your performance, or what's going to happen to it next. Gillette held over 70% global share for years, but strong behavioural signals didn't stop Dollar Shave Club from steadily taking away its long-term growth.

Attitudes are your compass.

They capture what's happening in people's minds: the perceptions, associations and opinions that influence whether someone will choose your brand. This goes beyond brand equity; it also includes how people perceive quality, what they associate with your category, and whether they trust you enough to pay more. Attitudes move before behaviours do, sometimes by months, sometimes by years.

DoorDash's attitudinal scores ran well ahead of its size when it was still a challenger in US food delivery; three years later it was leading the category, but consumer attitudes had shifted in its favour long before the sales did.

Expressions are your seismograph.

They pick up every tremor, but can't tell you which ones will become earthquakes: signals of what people are noticing, discussing, searching for or sharing in the moment, often before they can articulate an opinion. They're the searches we make, the posts we share, the reviews we leave, the likes and comments that ripple on social, the questions put to an AI assistant. Fast and rich, but messy: they rarely represent everyone, are easily skewed by vocal minorities, and are hard to compare consistently over time. A spike in search volume might signal genuine demand (think GLP-1 medications) or something else entirely (Corona beer during the COVID-19 pandemic).
Context is everything.

Exhibit: The Signals map

	What people do, think and say	What technology captures, reflects and generates
BEHAVIOURS	Purchases, subscriptions, footfall, repeat purchase, usage, switching	Transaction data, platform conversions, clickstream analytics, e-commerce records, AI-initiated purchases
ATTITUDES	Brand perceptions, predisposition, trust, perceived value, opinions about quality, category attitudes, recommendation intent, tracked through metrics like Meaningful Difference and Future Power	Nothing analogous to human attitudes, but LLMs and agents already carry brand associations in their training data that shape what they surface and recommend; algorithmic 'preference' is beginning to emerge
EXPRESSIONS	Search queries, social posts, reviews, word of mouth, likes, comments, shares, sentiment	AI recommendations, algorithmic rankings, chatbot answers, generative and synthetic outputs: the emerging 'machine web'

Source: Kantar

Each signal type now has a human source and, increasingly, a digitally generated one. The exception is attitudes as humans hold them: through memory, emotion and personal preference.

Algorithms already carry brand associations that shape which brands they surface and recommend, and AI agents will only get better at modelling individual behaviour. But for now, the attitudes that drive how real people choose can still only be accessed by asking them, which is why they remain the irreplaceable centre of any growth strategy.

AI's role in each signal

Many of these signals now have two faces: human, and digitally captured through AI. In some cases, AI simply informs how we read behaviours, attitudes and expressions: an algorithm recommends a product, curates what someone reads about a brand, or decides what surfaces in a feed. Most AI activity today works this way.

In small but growing pockets, technology is also now capable of generating its own behaviours and expressions. AI agents can already compare, negotiate and complete purchases on someone's behalf. A 'machine web' is emerging alongside the human one: agents querying agents, bots summarising content for other bots. Generative AI can also produce synthetic signals like digital twins and concept-testing models.

Who this all serves is unchanged. Algorithms influence how people choose or believe. An autonomous purchase executes someone's underlying predisposition; the machine web exists to serve a human need, even when no one is in the loop for that specific action.

Everything still points back to human attitudes, which can only be accessed by asking people about them. That's why attitudinal signals remain the irreplaceable centre of any growth strategy.

PROTECTING YOUR DIFFERENTIATION

There's a real risk worth naming. Left unchecked, AI can erode the differentiation brands depend on. Large language models are trained to predict the most probable next word, so their output drifts toward the average of everything they've consumed, which is why you might receive the same handful of predictable answers when you ask an LLM for ideas.

Our own BrandZ data shows perceived brand difference has declined globally for over a decade, from around 18% of brands rated meaningfully different in 2014 to roughly 14-15% today, and the proliferation of AI-generated content hasn't slowed this. It's culture and human judgement that keep a brand distinctive.

Whether that stays true is one of the most interesting questions in our industry. As AI agents learn from the people they serve, they could develop something that functions like preference. If that happens the read on signals still holds, but the sourcing shifts dramatically.

How signals relate to each other and what predicts what

01 IT'S PROVEN THAT ATTITUDES PREDICT BEHAVIOUR

Changes in how people think and feel about a brand reliably come before changes in what they do. When perceptions shift, sales and market share eventually follow. This works both ways: Professor Koen Pauwels, Distinguished Professor of Marketing at Northeastern University and a Kantar research collaborator, analysed 153 brands from markets around the world and found that attitudes drive purchase and purchase drives attitudes. But in most cases, attitudes move first.

That matters because attitudes can provide an early signal of future performance, and they don't only shift in slow, quarterly increments. Modern brand tracking, using always-on data collection and AI-assisted analysis, shows changes in attitudes more frequently and more accurately than before.

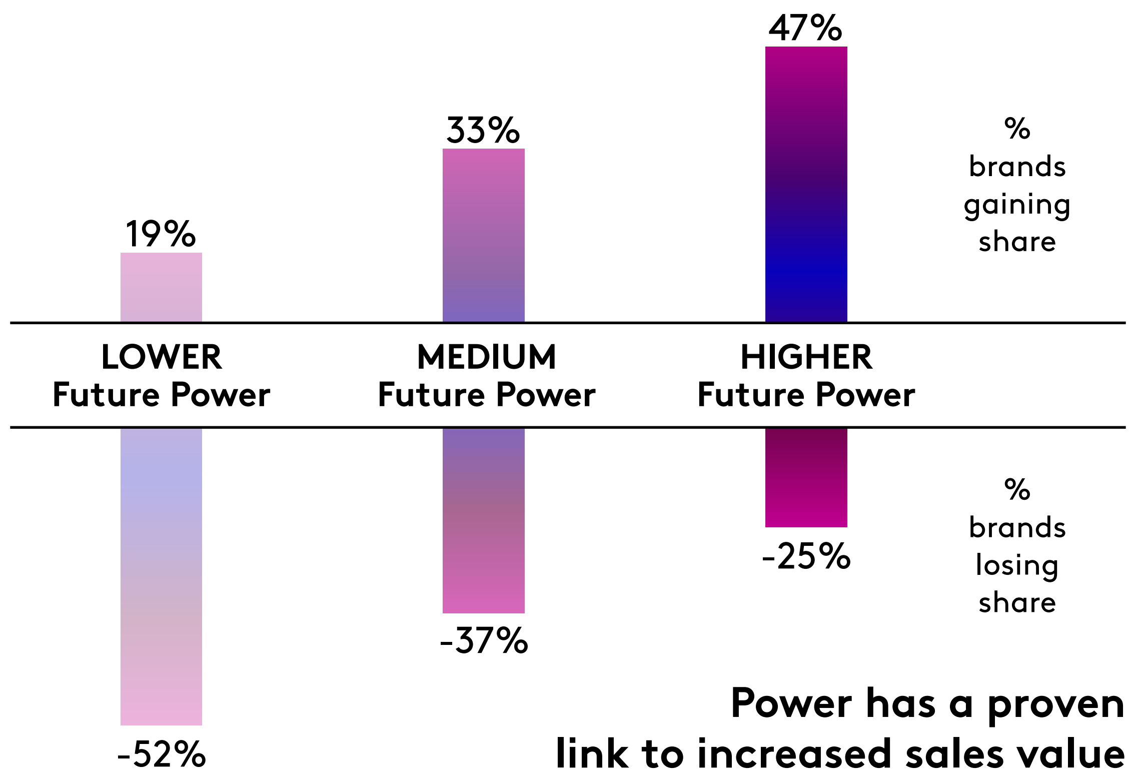
Future Power, Kantar's forward-looking measure of brand predisposition, is a good example. It's built entirely from attitudinal data, specifically how people perceive a brand's meaningfulness, difference and salience, with no sales or behavioural inputs at all.

Exhibit: Brands with high Future Power are 4x more likely to grow value share

HIGH Future Power brand are

4x

more likely to grow value share than **LOW Future Power brands**



Source: Kantar validation dataset, 350 brands from diverse categories (CPG's and non CPGs)

Brands with high Future Power are four times more likely to grow value share; among brands with low Future Power, 52% were actively losing share.

The predisposition gap doesn't just predict who wins. It predicts who falls behind. Thanks to continuous data collection, we can track Future Power as attitudes shift, not after the fact, which means predisposition can flag future winners and losers before market outcomes fully emerge.

Kantar's LINK+ ad testing system offers marketers a similar edge. On average, ad performance on LINK+ can anticipate shifts in brand equity roughly a year in advance, real advance warning that gives marketers time to act before a change shows up in standard tracking. That timing varies considerably from brand to brand, some effects surface within weeks, others take much longer, but the direction is consistent: strong creative moves the needle on brand equity well before it moves the needle on sales.

Exhibit: How far in advance can LINK+ predict brand equity shifts?

LINK+ ad performance can anticipate shifts in brand equity well before they show up in standard tracking.

11 MONTHS

average advance warning before a shift in brand equity appears in tracking.

Individual tracking varies significantly by brand.

Some effects appear within weeks; others take considerably longer.
The average is directional, not a precise forecast for any single brand.

Source: Kantar

On average, LINK+ ad performance anticipates brand equity movement by close to a year. Individual timing varies significantly, some effects appear within weeks, others take considerably longer.

None of this replaces asking people directly, but it does make asking faster and sharper: qual conducted continuously, samples large enough to read in near real time.

02 EXPRESSIONS CAN BE STRONG BUT NOISY INDICATORS OF ATTITUDES

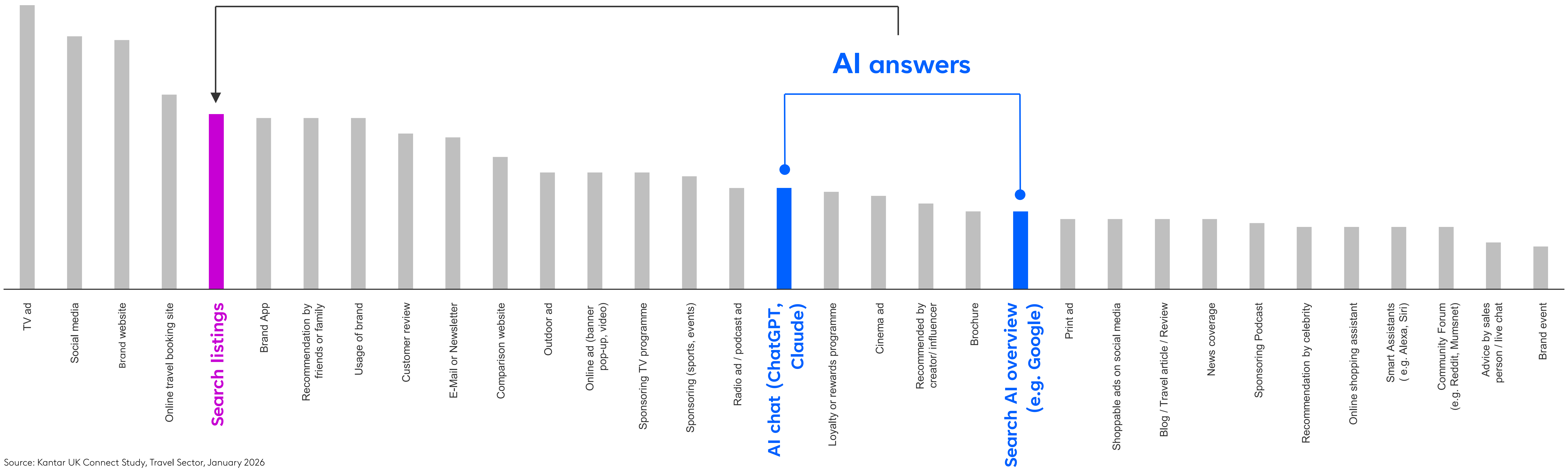
Digital signals, search, social, and even AI-generated content can be predictive of where attitudes are heading, but they don't replace the read on attitudes itself. Their strength is how they move in real time and connect to brand health, often surfacing while a shift is still unfolding.

Search has long been the clearest example. When a brand's share of search runs ahead of its market share, it's usually a sign of building demand; when it falls behind, it's a warning. But the landscape is shifting. In a recent UK travel study, AI answers and overviews have overtaken traditional search listings in influence on brand choice.

Expressions can also help diagnose what attitudes alone cannot explain. When a leading food brand saw trust scores dip in its tracker, social listening revealed the root cause: a spike in consumer complaints about specific ingredient changes. The brand knew something was wrong from the tracking survey, but it was the expressions that revealed what the specific problem was.

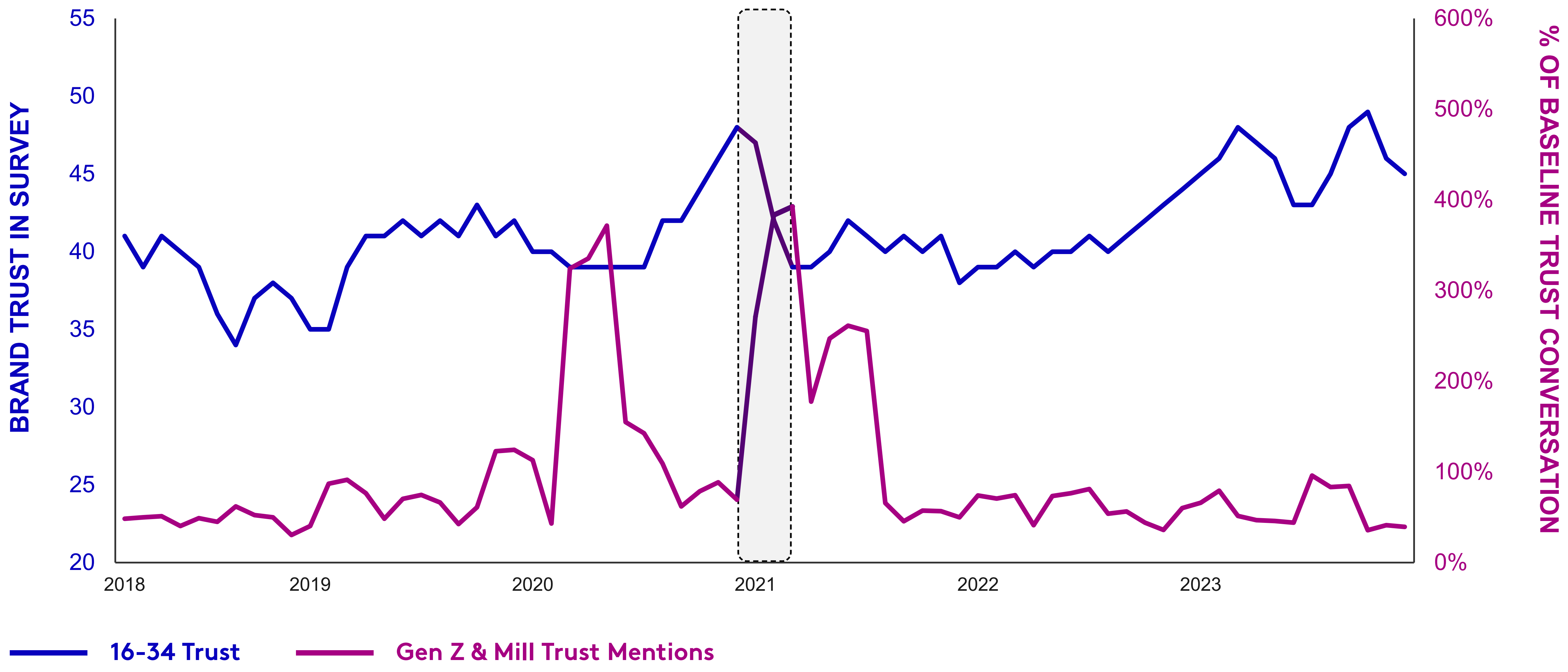
Exhibit: In brand impact, traditional search has already been overtaken by AI chat / overviews

Touchpoint impact on brand equity



Source: Kantar UK Connect Study, Travel Sector, January 2026

Exhibit: When expressions reveal what surveys can't



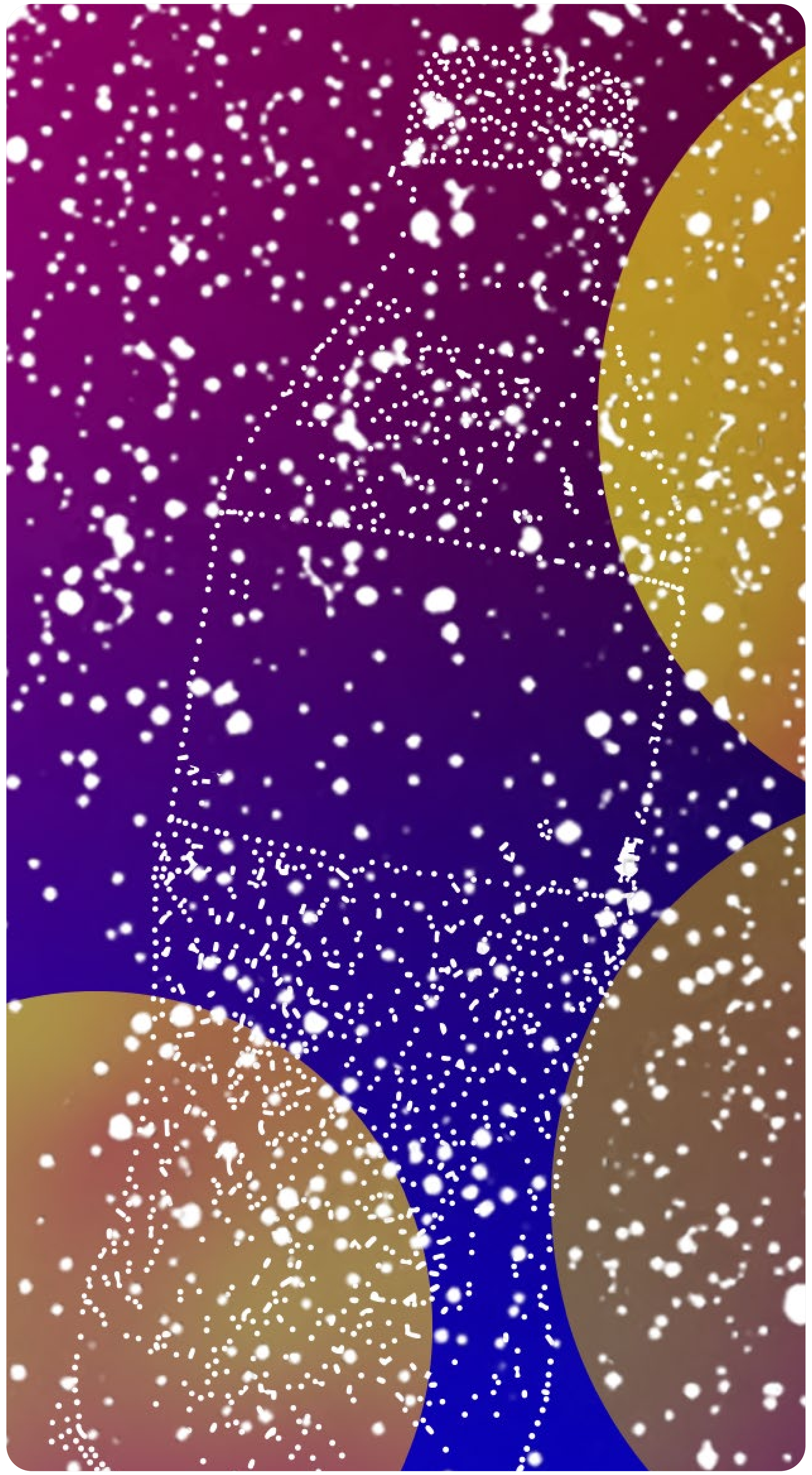
A dip in brand trust in early 2021 was sharper among younger consumers than the topline number suggested, and coincided with a surge in social conversation about the brand's ethics from that same cohort.

Source: Kantar Dx Analytics

But expressions can be powerful and unreliable in almost equal measure. In 2018, Nike featured former American football player and civil rights activist Colin Kaepernick in a campaign. Social media filled with boycott calls and burning trainers, yet online sales surged over 30%. More recently, when Coca-Cola launched a Christmas ad partly made with Gen AI, social users picked apart its visual imperfections; tested with everyday people using LINK+, it scored as one of the year's top-performing ads. In both cases, the loudest signal was the least representative.

The precise mapping of which expression metrics reliably act as a proxy for which attitudinal drivers is still being built, varying by category, audience and market.

What we can confidently say today is that expressions add speed and diagnostic richness that no other signal provides, while attitudinal data explains whether the underlying picture is actually changing.



03 BEHAVIOURS ALONE ARE A REAR-VIEW MIRROR

Behaviours confirm what happened. That's their job, and it's a valuable one. Sales, conversion rates, market share: these are the facts every CMO needs. But they're being asked to do more than they can.

It's an easy trap to fall into: we're drawn to what moves fast. A sale is instant feedback; a shift in brand perception is easy to overlook until it's too late.

Adidas was one of the first major brands to acknowledge this publicly. Its global media director admitted that a focus on ROI and last-click attribution had led the company to split 77% of spend on performance and just 23% on brand. The behavioural dashboards looked efficient, but when paid search went down entirely in one market there was no dip in traffic or revenue. This revealed that the attribution model had been overstating performance channels all along, and when Adidas introduced econometrics, it discovered brand activity was driving 65% of all sales.

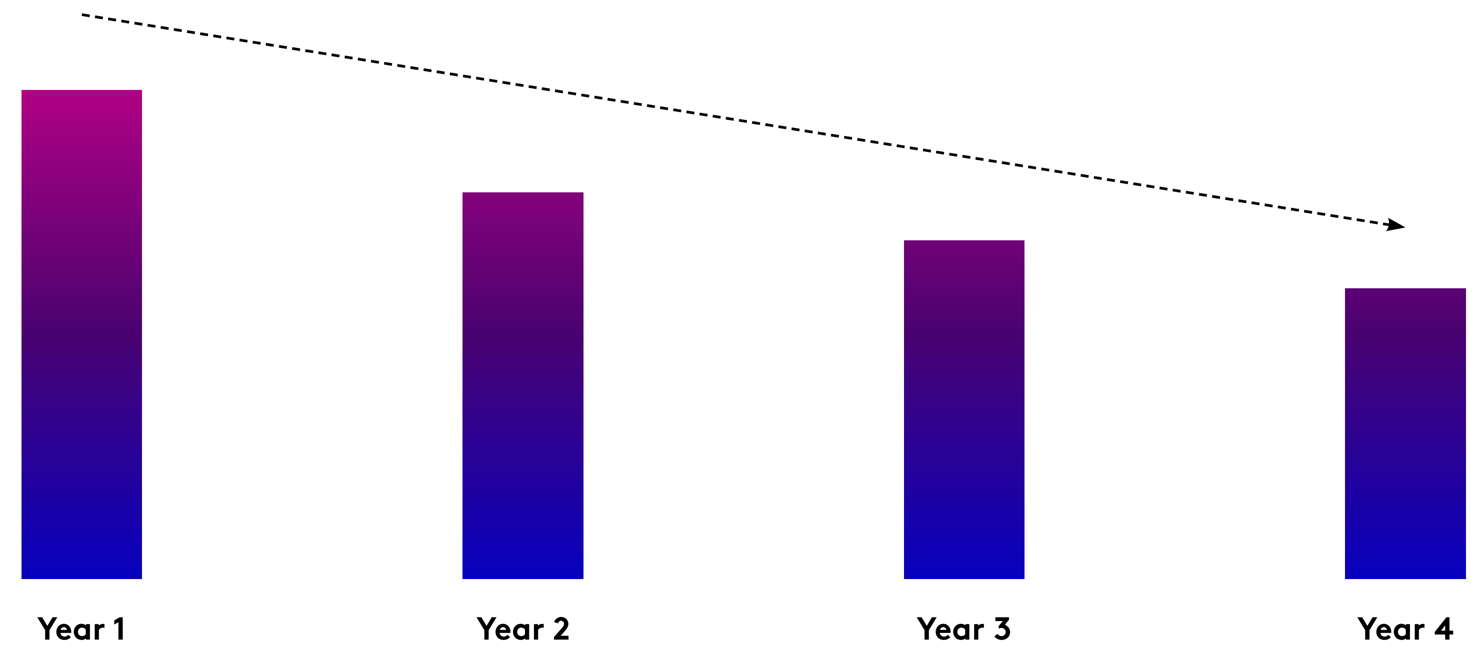
Kantar's marketing ROI data tells the same story. When companies consistently cut brand investment for short-term activation, baseline sales can drop by more than half within four years, even while the quarterly numbers still look manageable.

Burger King UK shows what happens when you flip it. Over-reliant on discounting and short on cultural relevance, its new CEO and CMO bet in 2018 on long-term brand building around the Whopper, doubling total sales. Their CEO at the time put it: "If you don't invest in the brand, you will surely lose relevance and you'll surely die."

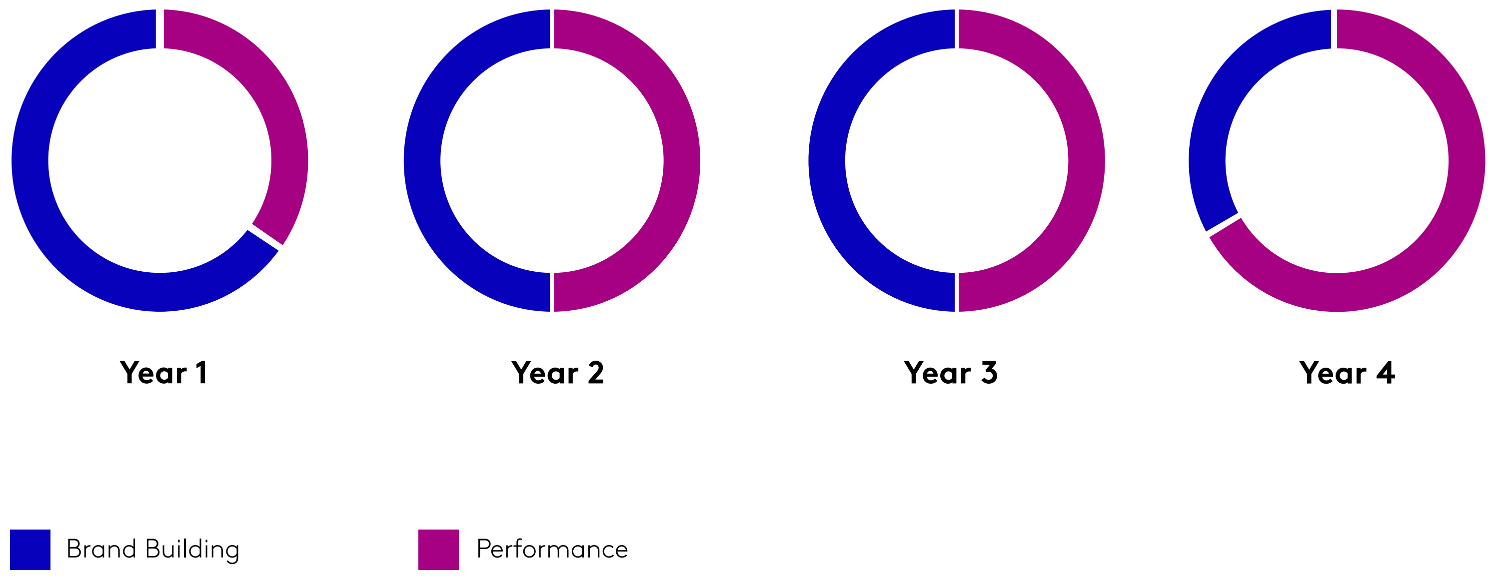
None of this means behavioural data is wrong. But it was never designed to carry the weight of strategic direction alone.

Exhibit: When brand investment fails, dependence on performance rises

Decline base sales



Market spending



Source: Kantar Analytics Practice Marketing ROI Norms Database

Growth compounds when signals align

What's happening today is that CMOs have plenty of data and still can't see what's coming. Attitudes, expressions and behaviours are at their most powerful when they move together.

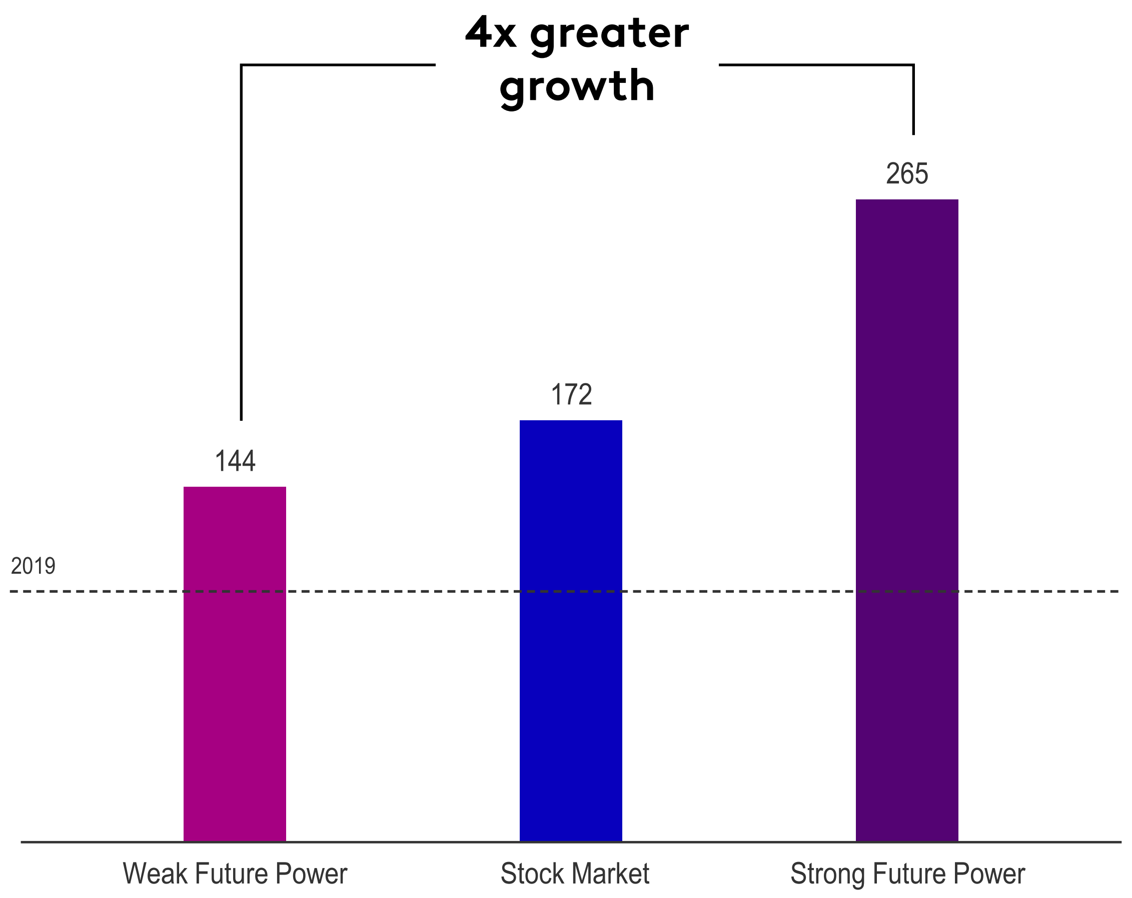
Strong perceptions drive purchase. Satisfied customers talk. That talk builds predisposition in new audiences, who then buy. The cycle accelerates and growth starts compounding.

Octopus Energy is the cleanest example in recent years. In a category notorious for low satisfaction and high inertia, it built Meaningful Difference through exceptional service and green energy innovation, earned the sector's strongest word of mouth (nearly 40% of UK consumers say they've heard good things about the brand), and converted that into a surge from near-zero to the UK's number one electricity supplier in six years. Every signal reinforced the next.

It's not just individual brands that prove this point. If you'd invested in a portfolio of brands with strong Future Power in 2019, your money would have nearly tripled by 2025, a return index of 265, against 172 for the stock market and 144 for weak Future Power brands. When signals align, the payoff goes well beyond marketing.

Exhibit: Strong brands deliver better financial returns

Portfolio performance index



Source: Kantar x Google 2026

A recent Kantar meta-analysis across six markets found that brand equity can drive up to 35% of new sales; consistent investment grows it further, while cutting it lets equity erode and sales stagnate for years.

Reading signals together matters, but the real competitive advantage is knowing what to do when they disagree.

Divergence doesn't always mean danger, sometimes it's an opportunity. Either way it isn't random: usually a pattern points to a specific root cause, and naming it is the first step to knowing what to do.

Exhibit: Some of the most common patterns in diverging signals

Signal pattern	What it usually means	Recommended response
Sales up, attitudes down	Growth is being borrowed from the future, while equity quietly erodes	Invest in or rebalance towards brand building
Attitudes up, sales down	Demand exists but faces barriers	Solve the practical barrier
Expressions negative, attitudes and behaviours stable	Online noise is not representative of the mainstream	Validate against representative attitudinal data before reacting
Expressions move before attitudes	Possible early warning signal	Treat as a hypothesis and investigate further
Behaviour strong, attitudes and expressions weak	A brand health problem is hidden while habit or scarcity prop up sales	Act before behaviour turns, short-term revenue can mask long-term risk
One behavioural signal contradicts the brand measure	You're only seeing part of the picture	Triangulate your signals to be sure

Source: Kantar

When to use each signal

Not every decision requires a full suite of data, and not every signal deserves equal attention every time. Here's how that plays out across four questions every CMO will face.

HOW STRONG IS THE BRAND RIGHT NOW?

Start with attitudes, and make sure the read is forward-looking, not just current perceptions: Future Power catches an early warning even when today's predisposition still looks fine. Pair that with behaviours to sharpen the diagnosis. Sales dipping while attitudes hold usually points to distribution, pricing or the economy. Attitudes dipping while sales hold is the one to watch: the demand floor is weakening before the numbers show it.

DID THE LAUNCH LAND?

Behaviour gives you the first read, it tells you if people bought your product. But a successful launch is more than first-week sales. Expressions show whether momentum is building or fading; a quick deep dive into consumer behaviour and attitudes can tell you whether it's earning predisposition or just a trial spike.

IS THE CAMPAIGN WORKING?

That depends on what it was meant to do. A performance campaign: conversion rate is your answer. A brand campaign: attitudinal shift matters even if sales haven't moved yet, and marketing mix modelling can connect the two. Expressions give you the earliest read, a creative sparking conversation shows up in social and search long before the next tracker wave lands.

IS THE CATEGORY SHIFTING?

This is where you need all three: expressions surface the earliest signs, attitudes validate whether the interest is broad-based or a fad, and behaviours confirm the shift has commercial weight.

Exhibit: How much evidence does this decision need?

Question	Start with	Add next	When do you need all three?
HOW STRONG IS THE BRAND?	Attitudes (incl. Future Power)	Behaviours	When diagnosing conflicting signals
DID THE LAUNCH LAND?	Behaviours	Expressions	To distinguish trial from lasting adoption
IS THE CAMPAIGN WORKING?	Behaviours or attitudes, depending on objective	Expressions, MMM	To quantify full impact
IS THE CATEGORY SHIFTING?	Expressions	Attitudes	Almost always

Source: Kantar

The underlying principle is simple: match the depth of evidence to the stakes. Routine tactical calls need speed and a single strong metric. Forward-looking strategic questions need attitudes and expressions working together.

The biggest decisions demand triangulation across all three.

Seeing it in action: "Did the launch land?"

Two in three new launches are dead or dying by their second year, not because the products were bad, but because the signals were read in isolation, or not read at all.

Here's a hypothetical example: a CMO overseeing a new launch.

BEFORE THERE'S EVEN A PRODUCT

Long before a brief is written, expressions are already showing where latent demand is forming, in shifting search patterns and conversations about unmet needs. None of this is a product concept yet, but it's exactly the raw material for one.

PRE-LAUNCH

Once a concept takes shape and a teaser campaign goes live, search interest and social conversation start climbing, and early cultural signals suggest genuine curiosity rather than paid-media noise. At this stage, attitudes haven't moved and behaviours don't yet exist. Expressions are doing the only job available: Sensing whether the market is ready.

LAUNCH WEEK

The first behavioural signals appear, but they don't tell the full story. Day one sales are 10% above forecast, but complaints emerge on social media around a specific feature. Read alone, the behaviour data says celebrate; the expressions say panic. A quick post-purchase pulse survey reveals 80% of buyers would recommend the product, and the negativity, while real, is confined to a vocal minority. Proceed with confidence, but fix the complaint before it hardens into an attitudinal problem.

POST-LAUNCH

A quarter in, the question shifts from "did it sell?" to "will it stick?" Repeat purchase is growing but decelerating, which is normal, and search share remains elevated. But what matters most: the brand tracker shows the attributes the launch was designed to strengthen, quality perception, personal relevance, have moved upward. The product is generating transactions and building predisposition, compounding its positive impact for the brand.

Exhibit: Which Signal Leads at Each Stage of a Launch?

Stage	Signal(s)	What It Tells You
BEFORE THERE'S A PRODUCT	Expressions	Where latent demand is forming
PRE-LAUNCH	Expressions	Whether the market is ready
LAUNCH WEEK	Behaviours + Expressions	Whether people are buying, and what they're saying
POST-LAUNCH	Behaviours + Expressions + Attitudes	Whether you're building the brand, or just borrowing from it

Source: Kantar

At every stage, a single signal would have told a partial, potentially misleading story. Sales alone would have missed the social risk. Social alone would have overstated it. Not every decision needs a three-signal committee.

But every important one benefits from asking: what are the signals telling me, and are they telling me the same thing?

What's coming next

The three signals are a starting point, but they are not the finishing line. Behaviours, attitudes and expressions tell you what's happening and what's coming, but there are still open questions about how best to use each one that we'll explore in upcoming publications: where AI can stand in for the attitudinal read and where only real human attitudes will do; how to read expressions in real time without being misled by short-term noise; what it takes to embed this kind of signal intelligence into how decisions actually get made; and the questions worth asking before betting on any signal, from proper benchmarking to whether it survives scrutiny from a sceptical CFO.

Moving from signal overload to signal clarity

You will never have perfect information and signals won't always agree; the data will sometimes be noisy, lagging or contradictory. That's not a flaw in the system. It is the system. Signals can inform, and AI can synthesise, but neither can decide what matters, what trade-offs to make, or what risks are worth taking. That remains a human call, one that takes experience, discipline, and nerve.

If this piece leaves you with one thought, let it be this: stop measuring everything and start seeing where your brand is heading. The advantage isn't in having more data, it's in the judgement you bring to it.

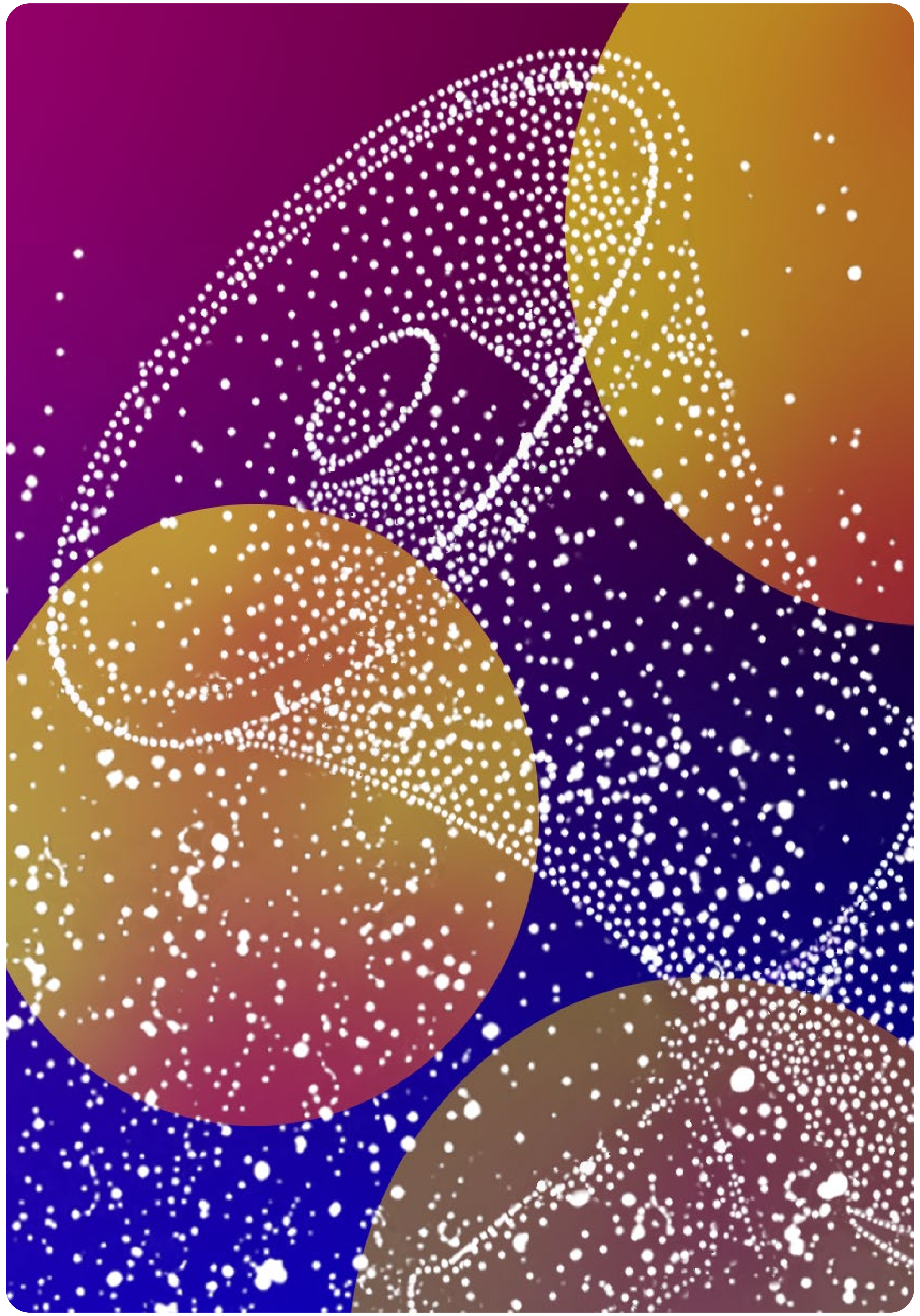
What to do next

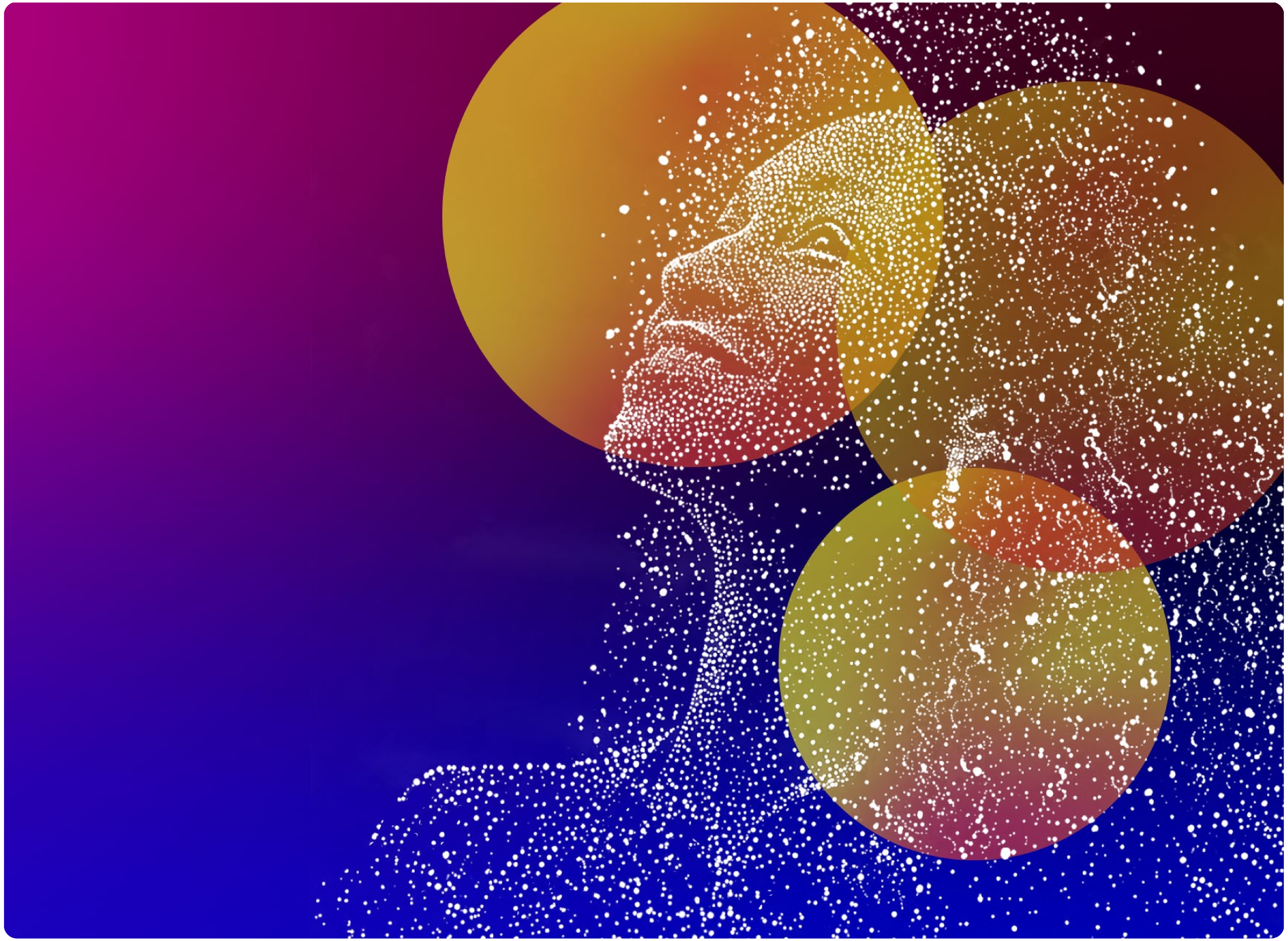
Two practical ways to get started:

	Clarity on what matters	Confidence before acting
WHAT IT'S FOR	CMOs facing dashboard overload or teams pulling in different directions	High-stakes moments: major strategy shifts, large budget reallocation, critical launches, brand repositioning
WHAT IT IS	A rapid, structured review of your existing signal landscape: mapping every metric you track and flagging duplication, blind spots, and signals that look convincing but may be misleading	A focused 2–3 week process to challenge, verify and augment the evidence behind a specific decision: stress-testing whether key signals hold up, closing evidence gaps with fast-turn research, setting out assumptions, trade-offs and risks
WHAT IT GIVES YOU	A custom signal hierarchy: a clear blueprint for what to watch, validate and deprioritise	A defensible go/no-go recommendation leadership can take into the boardroom with confidence

Source: Kantar

Whichever you start with, the goal is the same: fewer signals fighting for attention, and more confidence in the ones that matter.





ABOUT KANTAR

Intelligence for Brand Growth

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.

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