



Changing
CHANNELS
with Confidence

AdReaction

2012

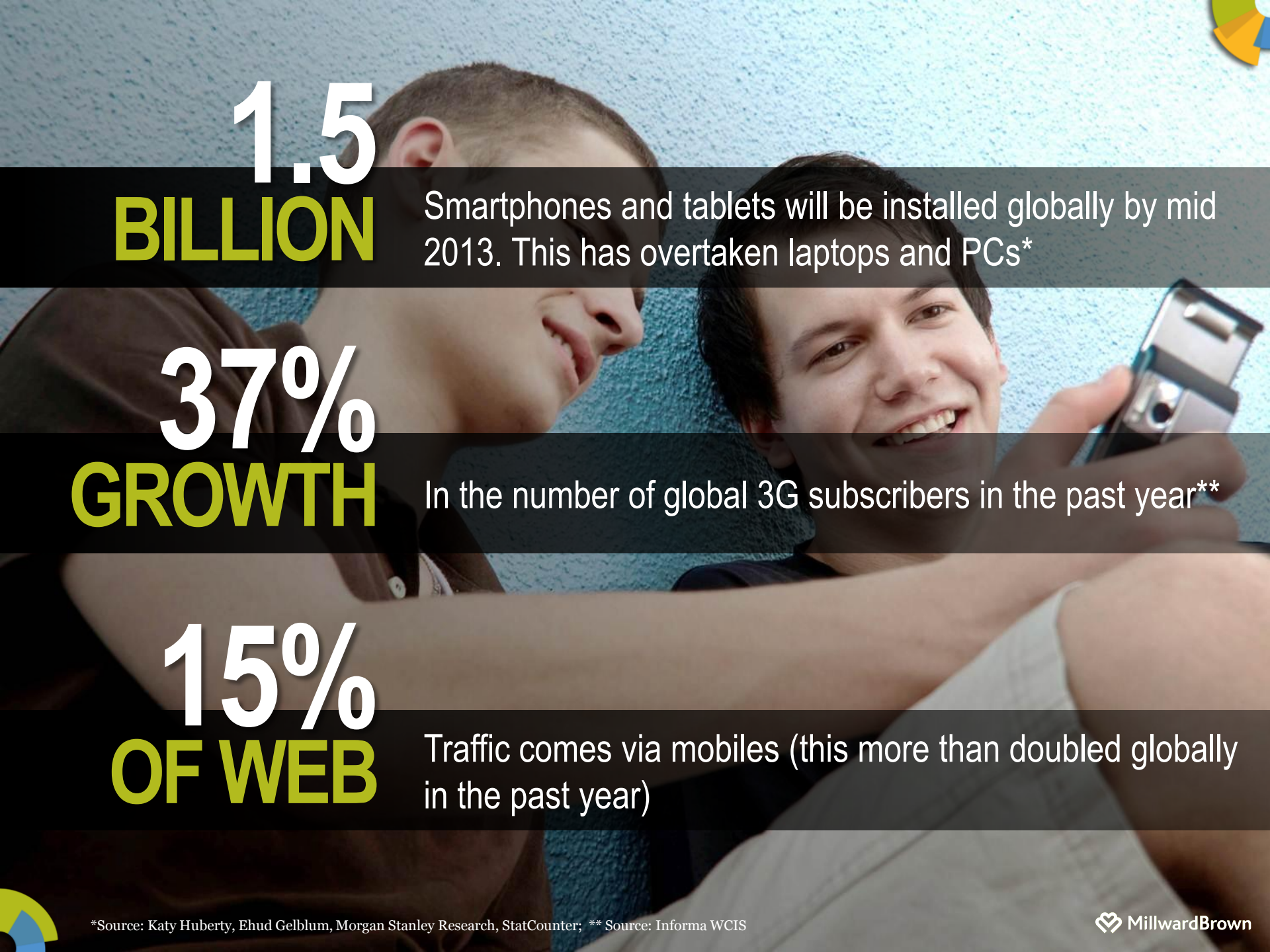
Millward Brown



Research took place in **18** countries around the world



*Quant only, ** Qual only,



1.5
BILLION

Smartphones and tablets will be installed globally by mid 2013. This has overtaken laptops and PCs*

37%
GROWTH

In the number of global 3G subscribers in the past year**

15%
OF WEB

Traffic comes via mobiles (this more than doubled globally in the past year)




Just 1%
OF SPEND

Globally is committed to mobile marketing

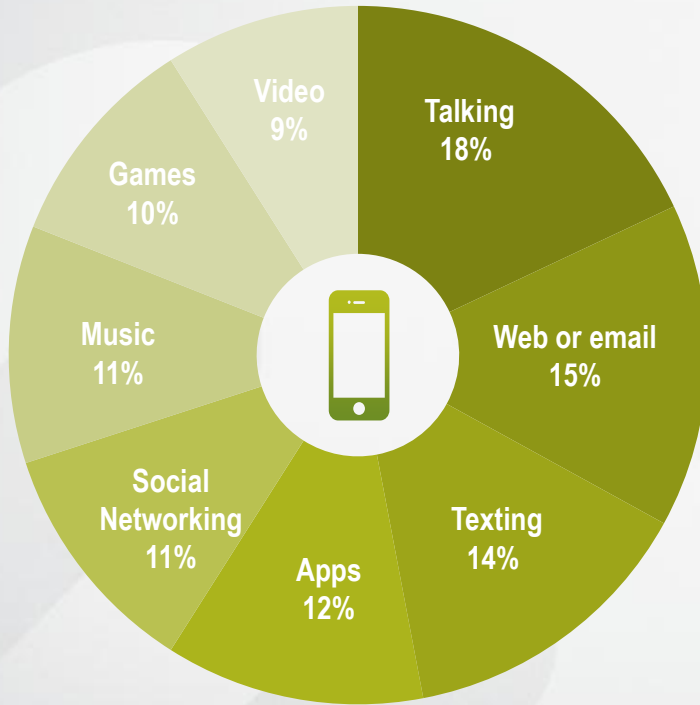
In Italy **0.3%**

3x
BY2015

Mobile ad spend predicted to grow
from \$6.4bn in 2012 to \$18.6bn in 2015

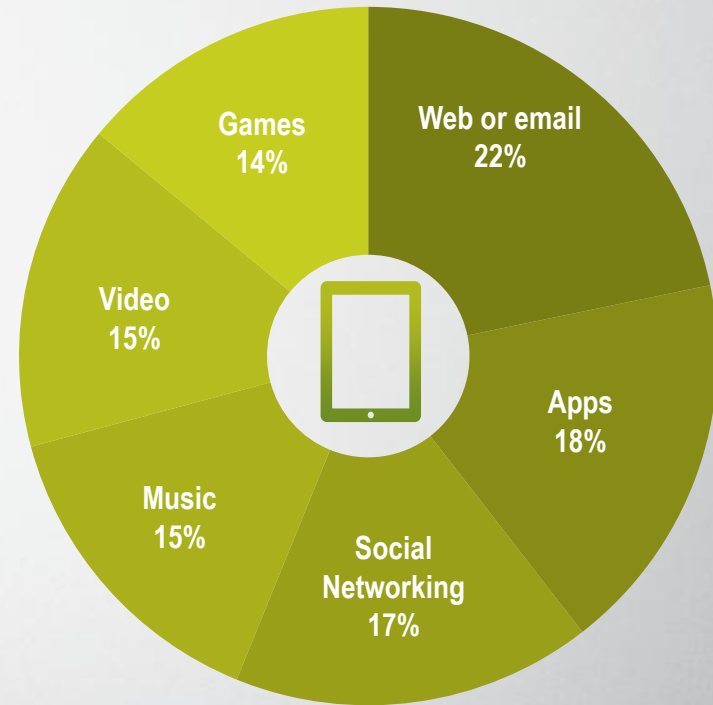


Share of smartphone time spent



Sample: smartphone users, ITALY data

Share of tablet time spent



Sample: tablet users, ITALY data

*In a typical week, how do you spend
your time on...*





**BEYOND
ESSENTIAL**

“My smart phone is the “centre” of my multimedia network since I carry it everywhere.”

**MULTI-
TALENTED**

“A tablet is the ideal device to browse the internet, read emails listen to music and to watch videos. The system boots very quickly and the shape/size very convenient in front of a TV.”

INDISPENSABLE

“My phone functions as an indispensable remote control of life.”

TRULY SMART

“I use my Phone for everything! Navigation, e-Mail, Apps, Games, etc. Simply for everything!”

FUN

“Its just fun to play around on these wipe boards.”

People  their mobile devices



**ARE BRANDS
WELCOME**

in this intimate space?



ATTITUDES

*towards mobile
marketing formats*

GENERAL OPENNES



...at the same time...



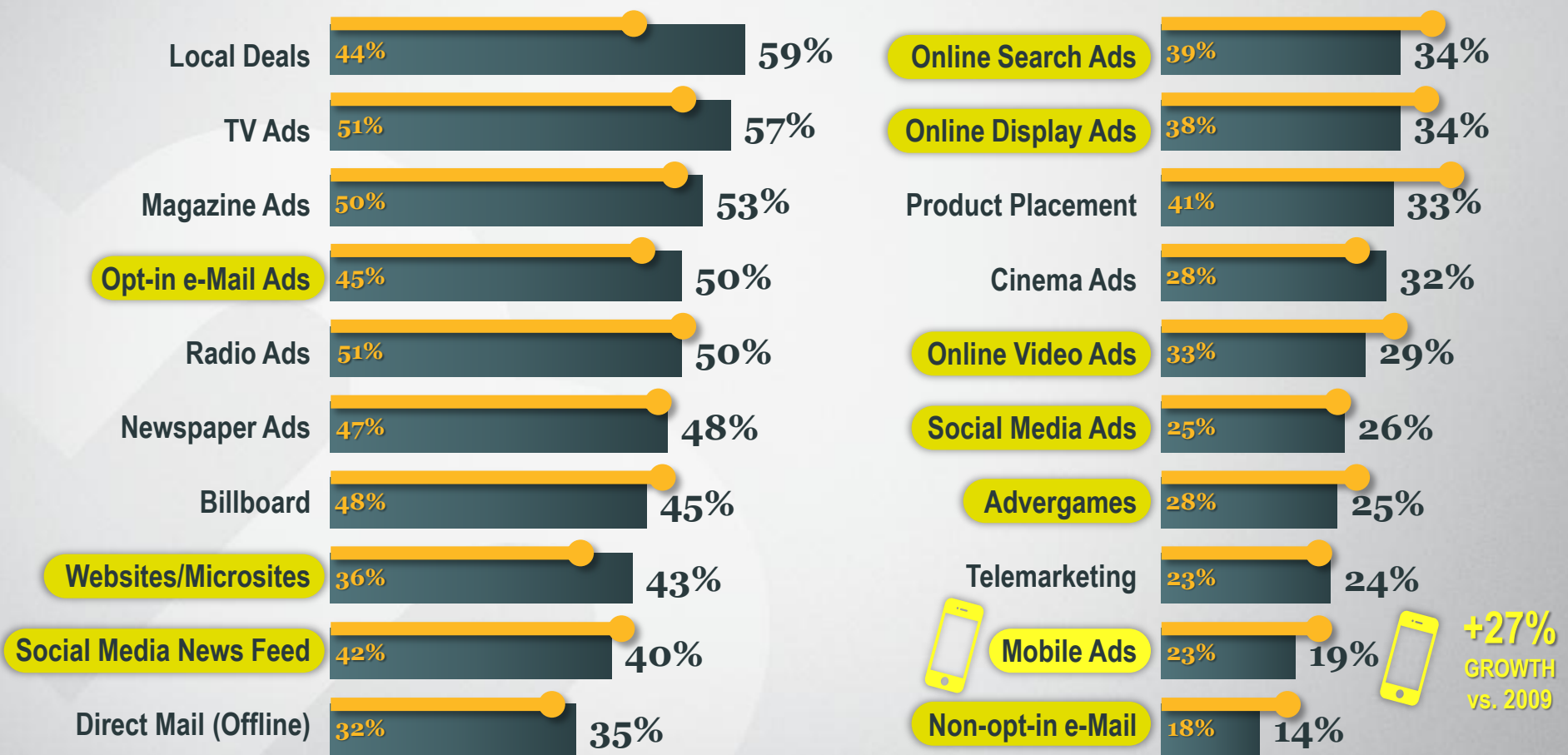
A SENSE OF INTRUSIVINESS

*How would you characterize your attitude
towards advertising on mobile?*

Very/somewhat favorable, %

Italy % Global %

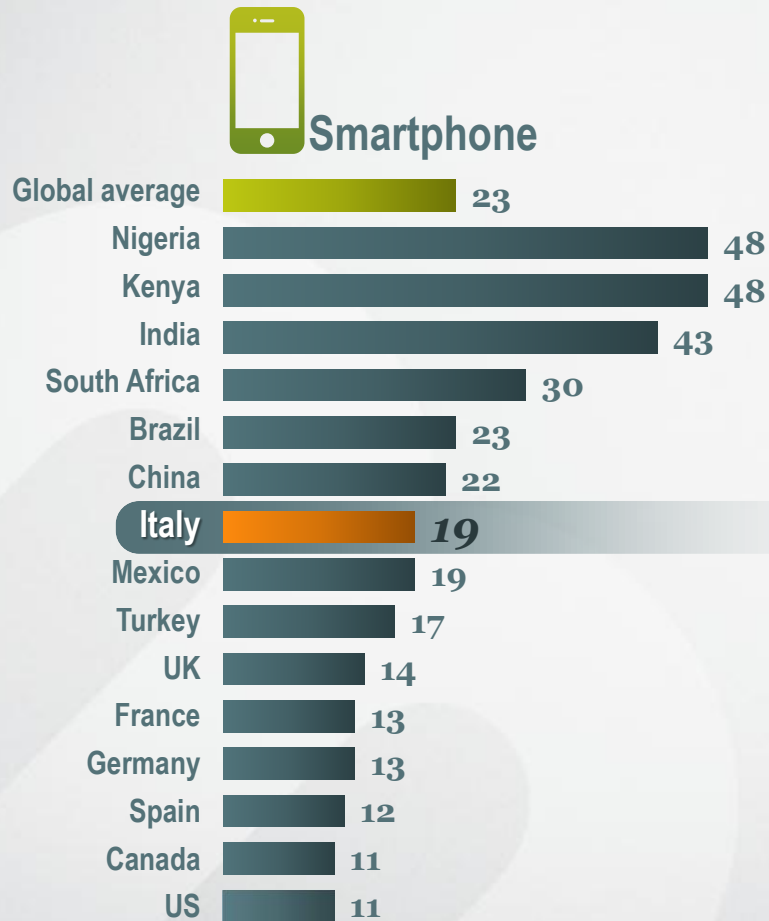
Digital



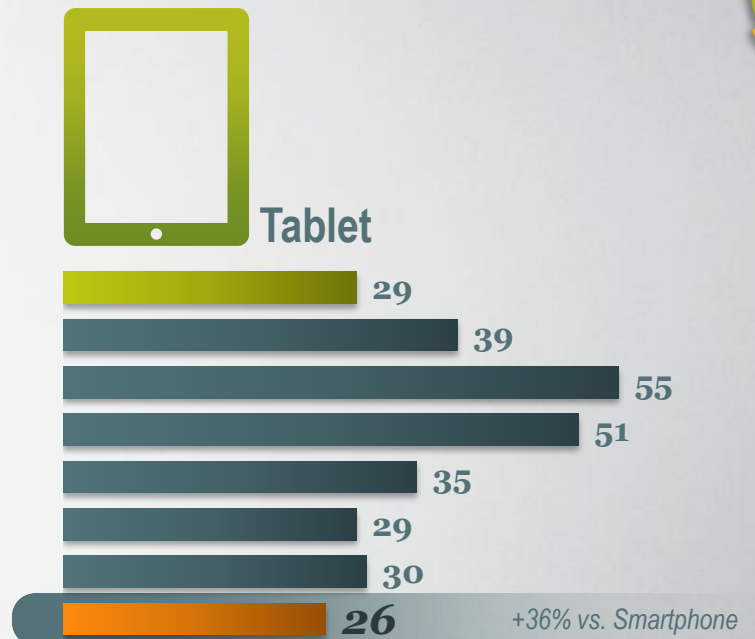
+27%
GROWTH
vs. 2009

How would you characterize your attitude towards advertising on ... ?

Very/somewhat favorable, %



Sample: smartphone users



+36% vs. Smartphone

Sample: tablet users

How would you characterize your attitude towards advertising on ... ?



45%

Are happy to see **ads in apps**, as long as the **apps are free**

38%

Are happy to see **ads on mobile websites**, as long as the **content is free**

35%

Are happy to **share their location** to get **more relevant services / offers**



What's in it for me?



MOBILE IS FLEXIBLE

AND CAN PLAY MANY ROLES
IN THE
COMMUNICATIONS
MIX

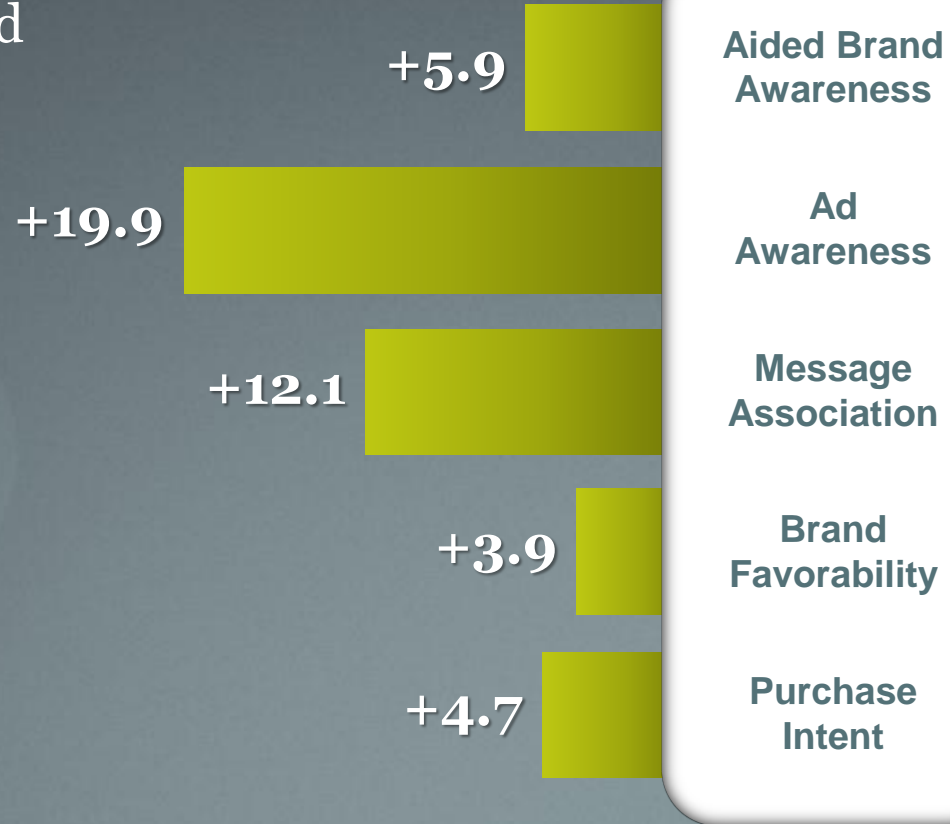
Mobile makes the consumer more *receptive*

Average impact on brand metrics

(Δ)=Exposed-Control



Database: 400+ campaigns

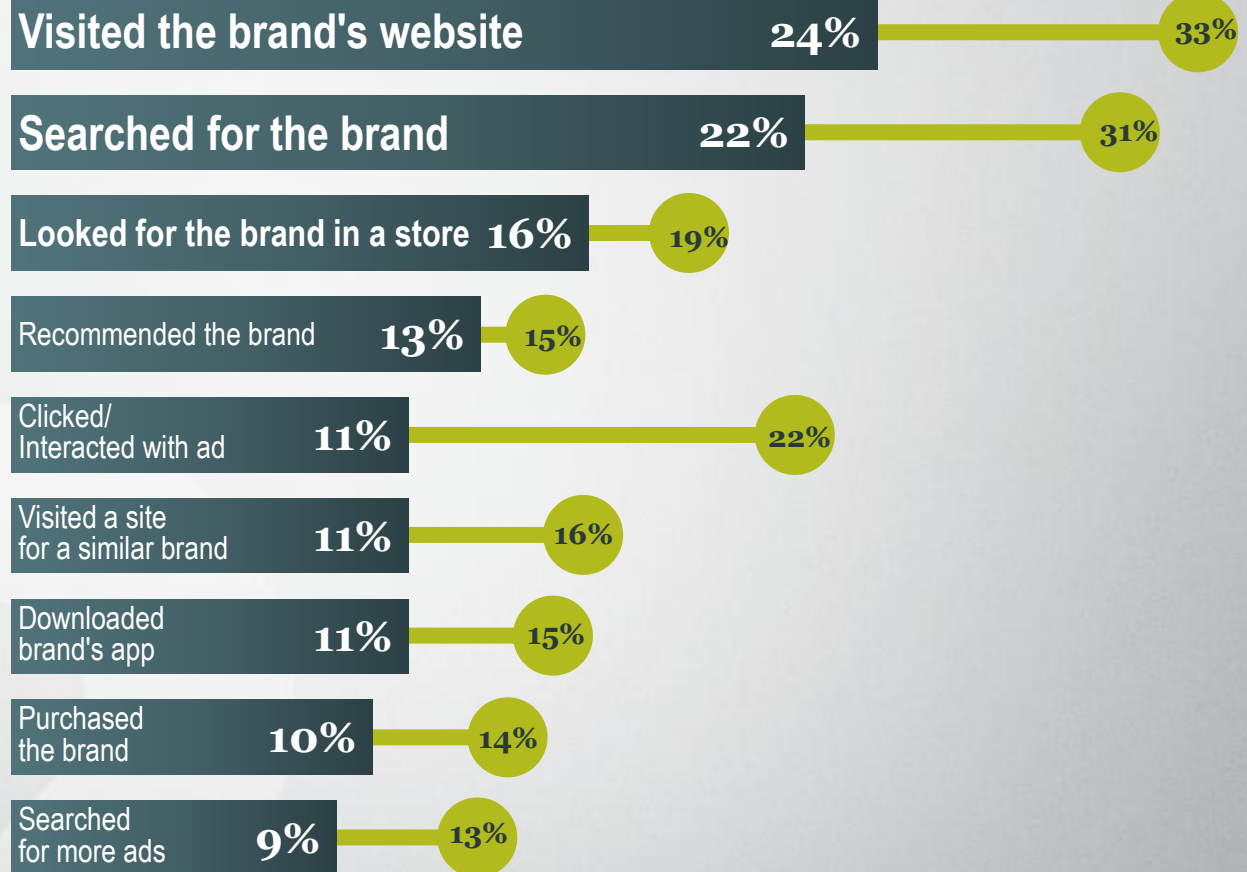


Mobile can be a powerful place where to build value for your brand

Mobile makes the consumer more *reactive*



Global %
Italy %

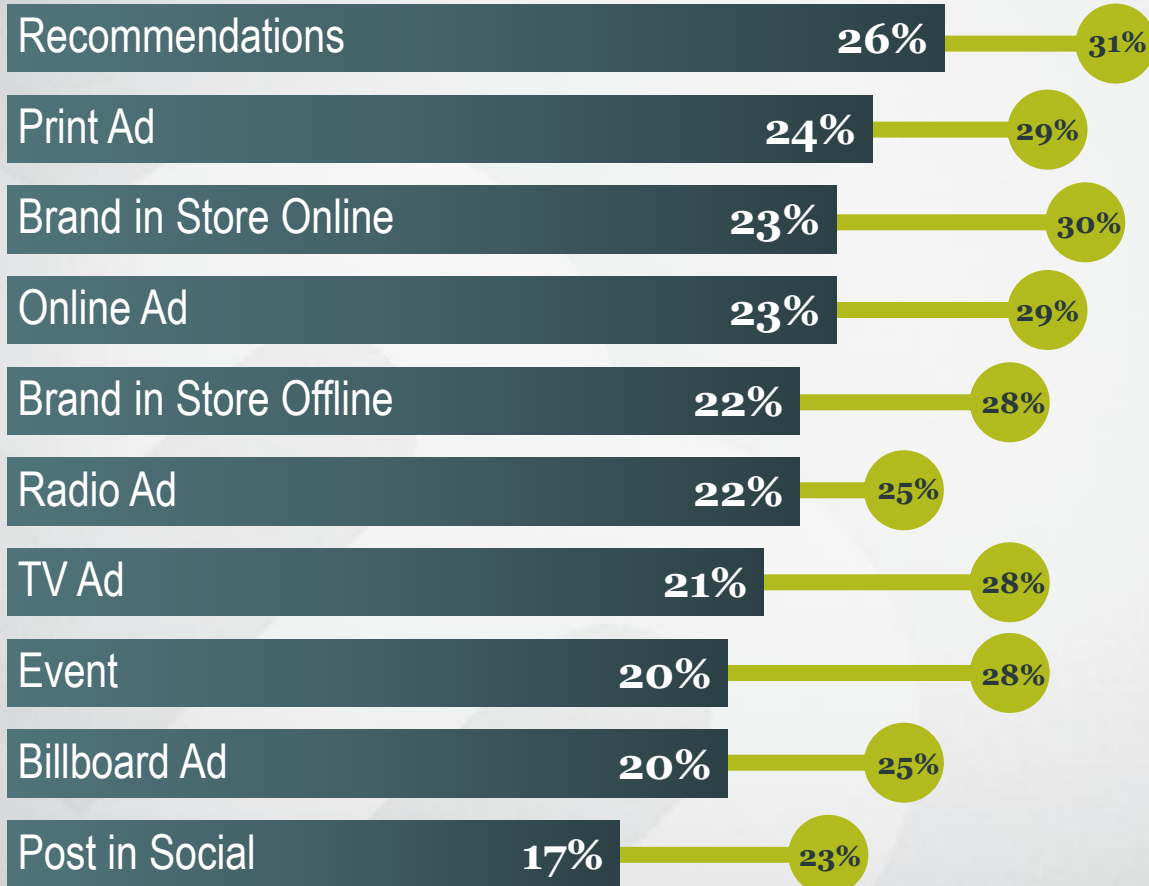


Which of the following actions have you taken as a result of seeing a mobile ad?



Global %

Italy %



Don't just rely on mobile display to generate traffic; any media can drive users to a mobile website

PRINCIPLES

FOR A BRAND'S

MOBILE SUCCESS

Relevance
Engagement
Surprise and Delight
Play to Strengths
Exchange
Competence
Time and Place

The RESPECT model

← ...for the **Platform**

...for the **Audience** →

*RESPECT for the mobile audience and platform
will ensure a constructive future*



R

relevance

Mobile content needs to be **tailored to both the target audience AND the context** where they will most likely experience it.

This is particularly important in the intimate mobile space.

Mobile provides opportunities to **go deeper when users have moments of downtime.**

Think long-term repeat engagement, not short-term hostage taking.



E

engagement

Mobile **can play a unique role** in the wider media mix since it is both **portable and personal**.

Don't expect it to achieve things it's not suited to (heavier duty content).



Put a smile on the face of your consumers with every mobile connection you deliver.

People want a companion in their pocket, not a bully.





E
exchange

Users are looking for **something of value in return** for access to their mobile phones.

Do make them feel they have control over their device.



C
competence

More than any other media, mobile marketing needs to be **clear, functional** and **focused**.



T
time &
place

Mobile content needs to be **tailored to when and where** it is most likely to be consumed.

Usage states can be a lot more varied with a mobile device than online.



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CHANNELS
with Confidence



Millward Brown

CREDENTIAL



88 offices
in **58** countries,

with over **4,000**
employees



13,220

BrandDynamics™
& BrandZ™
PROJECTS

Research
conducted
in over

70
LANGUAGES



MILLWARD BROWN

part of **WPP**
& **KANTAR**

7,000
digital campaigns

2,121 TRACKING
STUDIES

over a 12-month
period.

84,000+

TV ADS
LINK™ TESTED
up to July 2012

QUALITATIVE
WORK in

78 COUNTRIES

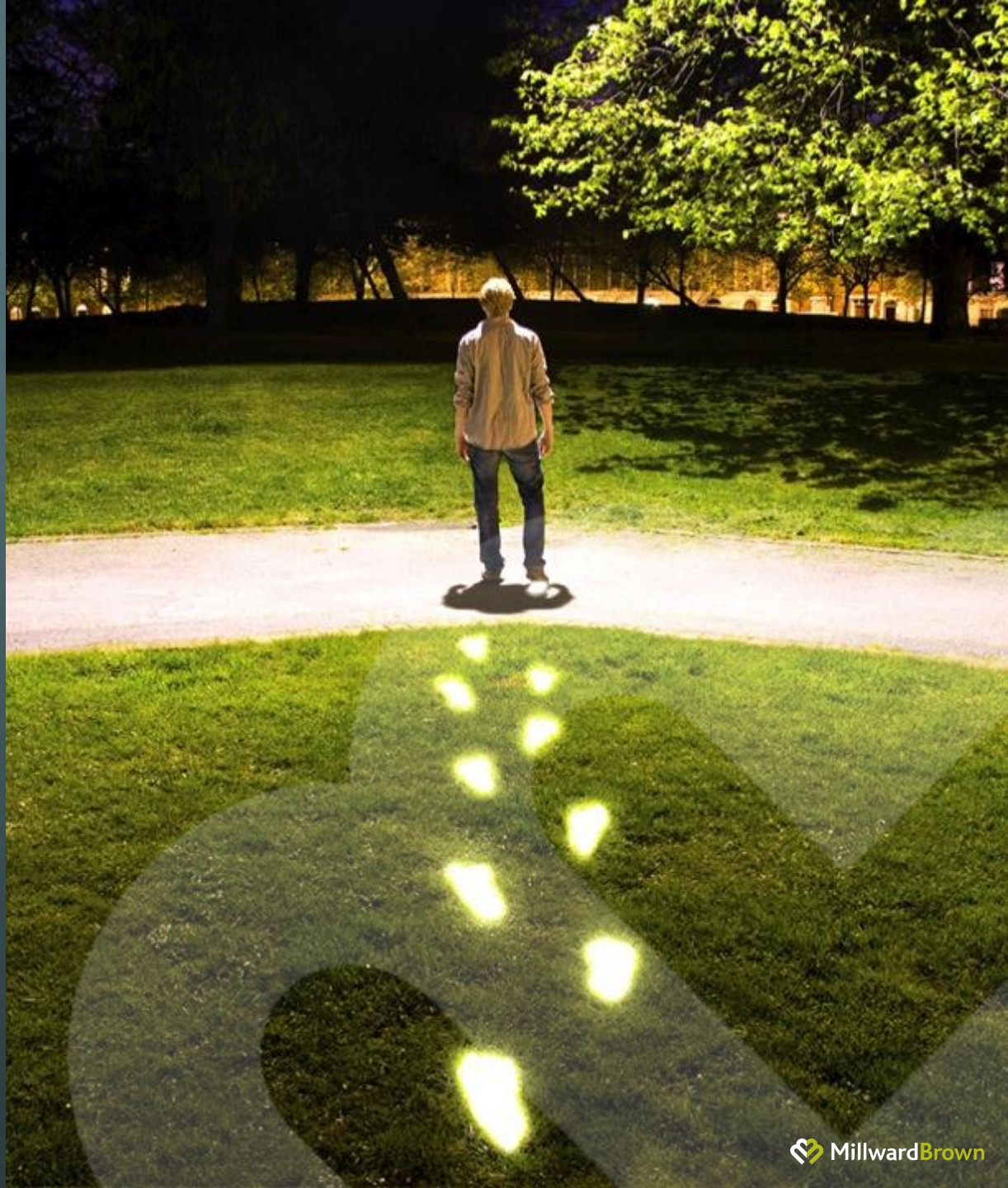




_____ a _____

GLOBAL QUALITATIVE BOUTIQUE

*leveraging
Millward Brown's
knowledge of brands
& communication*



Our Areas of Focus

BRAND STRATEGY

Explore brand insights to determine future strategies



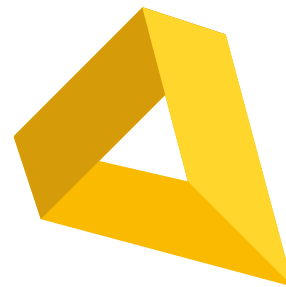
meaningfully
DIFFERENT

CREATIVE DEVELOPMENT

Develop differentiated messages, ideas and creative to win in market

BRAND PERFORMANCE

Understand, measure & manage brand equity to inform brand planning



CHANNEL OPTIMIZATION

Optimize channel activities to improve return on investment



Global Presence, Local Expertise





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