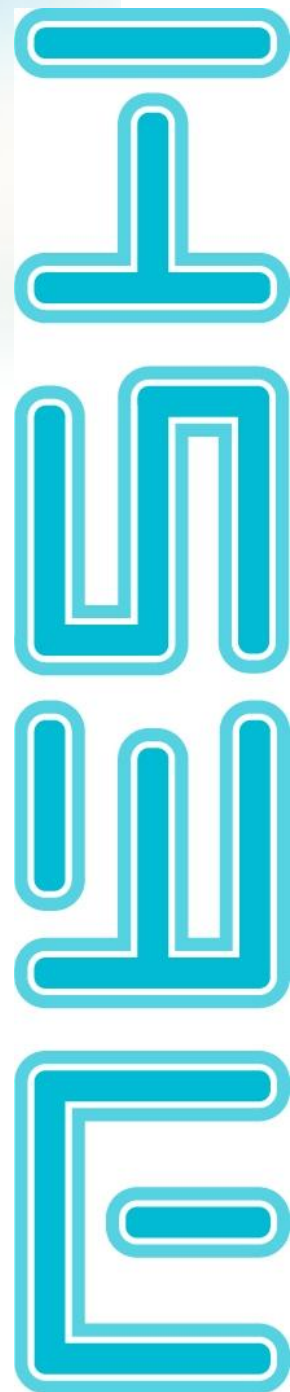


In the moment, who responds to what?

New Insights from TROI real-time research

Fiona Blades, MESH Planning

International Direct Marketing Fair
29th April to 1st May 2008, Earls Court



Historically 2% response to direct mail...



...but what happened to the brand image amongst the 98%?

MESH

The advent of digital

E mail

WWW.com

a whole range of new measures... but we still don't know the ***emotional response*** or the ***wider context*** that has generated the response

1,206,45 2,258,40
1,245,00 1,245,23
1,021,30 3,031,40 2,458,00
2,241,00 2,704,00 3,150,40



TROI captures experiences as they happen

Meet Barbara

This is Barbara.
Clients want to know how
she relates to brands and
marketing in her world.



MP

Traditional research asks what do you recall having seen and where?



Traditional tracking relies on Barbara to remember what she has seen and exactly where she has seen it.



TROI tracking is real-time

14/01/08 – 21/01/08

08.04



08.46



12.12



16.11



18.22



22.04



Whenever Barbara sees, hears or experiences anything she particularly notices to do with the brands we are interested in she texts us:

1. What's the **brand**?
2. What's the **occasion**?
3. How did it make you **feel**?



Barbara's online diary

Adding texture...

Barbara is encouraged to give us even more texture by adding personal comments to her texts, using MySMSDiary.



my SMS diary

Below you'll find your own personal record of the texts you've sent us. Some people will have sent pictures too, but please ignore this column if you haven't. As you go through this section of the diary we hope the diary will act as a prompt to your memory and help to gain a richer understanding of your own experience.

| Date/Time | Send from | Send to | Decisions | Decisions (action) | Ending | Picture (IMG) | Comments | Text |
|-------------------------------|-----------------|-----------------|-----------------|--------------------|----------------|---------------|----------|------|
| Monday 01-09-2006 22:52 | Enlan | Enlan | the purchasing | | quite positive | | | 0072 |
| Tuesday 05-09-2006 16:55 | Enlan | Enlan | seeing to share | | neutral | | | 0074 |
| Wednesday 06-09-2006 16:22 | Enlan | Enlan | the purchasing | | very positive | | | 0076 |
| Thursday 07-09-2006 13:05 | Highland Spring | Highland Spring | Conversation | | | | | 0080 |
| Friday 08-09-2006 10:37 | Other | Other | Direct overtake | | | | | 0081 |
| Thursday 08-09-2006 10:34 | Burton Water | Burton Water | Other using | | neutral | | | 0081 |

Add and amend data

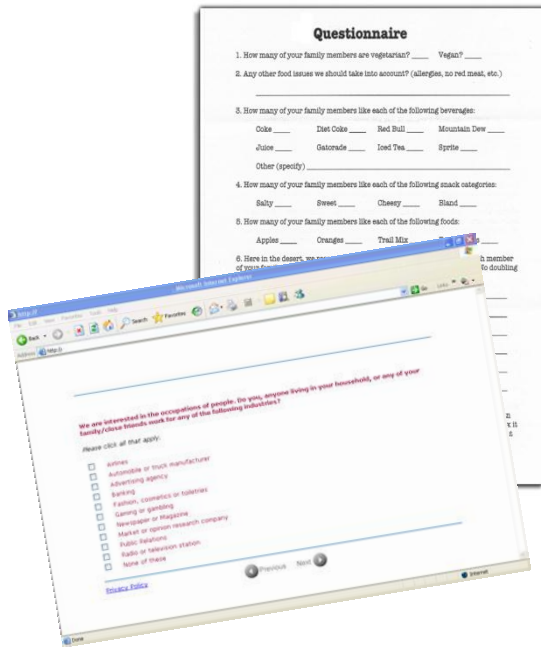
Add comments

Upload pictures into diary

What happens first?

At the beginning.....

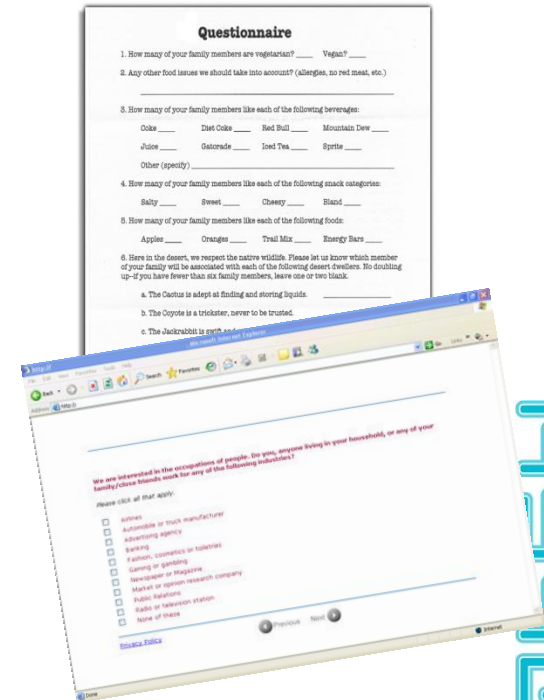
Barbara completes a pre-questionnaire to capture all her demographic data and pre survey views and opinions before tracking starts.



What happens afterwards?

Barbara completes a **post-questionnaire** after tracking to tell us the key messages she's taken from the brands and how her views have changed.

Before research can finish.....



TROI – a new real-time approach

Traditional Tracking Studies stop here!

Pre Questionnaire

- Brand Health
- Image Statements
- Usage
- Advertising

TROI

Real Time Tracking

- Brand
- Occasion
- Feel
- Time

Post Questionnaire

- Photos
- Comments
- +/- experiences
- ROI benchmarks



Below you'll find your own personal record of the texts you've sent us. Some people will have sent pictures too, but please ignore this column if you haven't. As you go through this section of the survey we hope the diary will act as a prompt to your memory and help us gain a richer understanding of your own experience.

my SMS diary [Save the changes] [Add New]

| Sub/Time | Brand | Brand (other) | Occasion | Occasion (other) | Feeling | Pictures (jpg) | Comments | TextID |
|------------------------------|-----------------|-----------------|-----------------|------------------|----------------|----------------|----------|--------|
| Monday 07-09-2006 22:53 | Evian | Evian | We purchasing | | quite positive | | Evian | 0285 |
| Tuesday 08-09-2006 14:10 | White | White | Seeing in store | | Neutral | | Evian | 0272 |
| Monday 09-09-2006 14:12 | Evian | Evian Touch of | We purchasing | | Very positive | | Evian | 0274 |
| Saturday 12-09-2006 12:08 | Highland Spring | Highland Spring | Conversation | | Neutral | | Evian | 0796 |
| Saturday 12-09-2006 18:27 | Other | Shops own plan | Other using | | Neutral | | Evian | 0800 |
| Thursday 10-09-2006 18:34 | Burton Water | Burton still | Other using | | Neutral | | Evian | 0801 |

TROI

How does it work in practice?

- 360 evaluation for Lynx/Axe
- The impact of promotional activity
- The customer journey to purchase



**Capturing how a catchphrase
caught on**

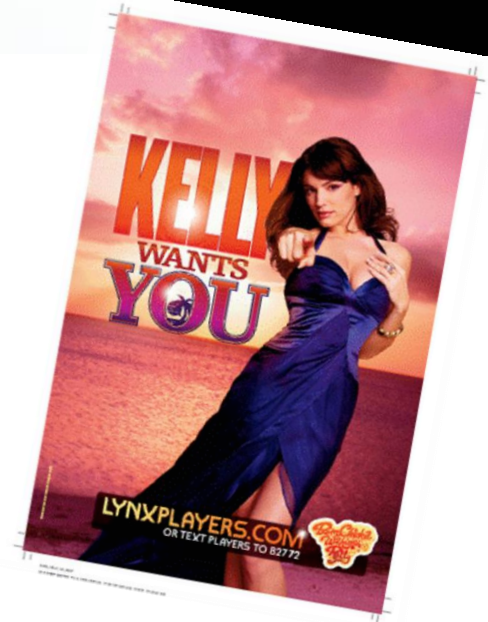
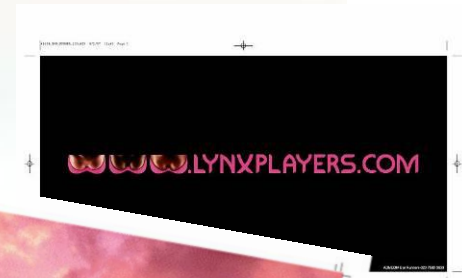
A 360 campaign



TV



Digital



Activation



Posters



New Product & Packaging





including a catchphrase ...

2 streams

Cool Brands



Catchphrases

Am I Bothered

Yeah but No
but

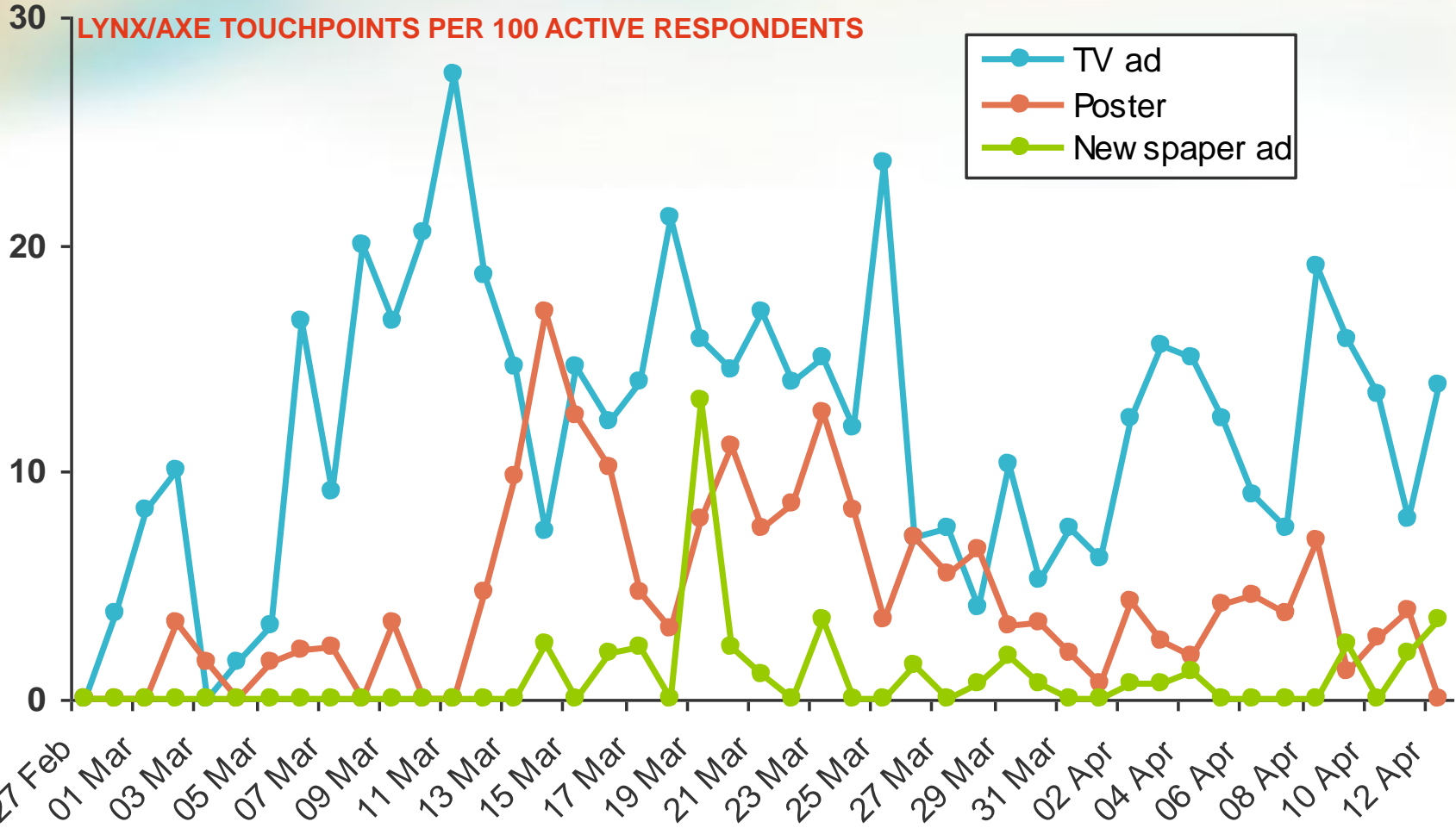
I'm Lovin' It

Just do It

Bom Chicka
Wah Wah



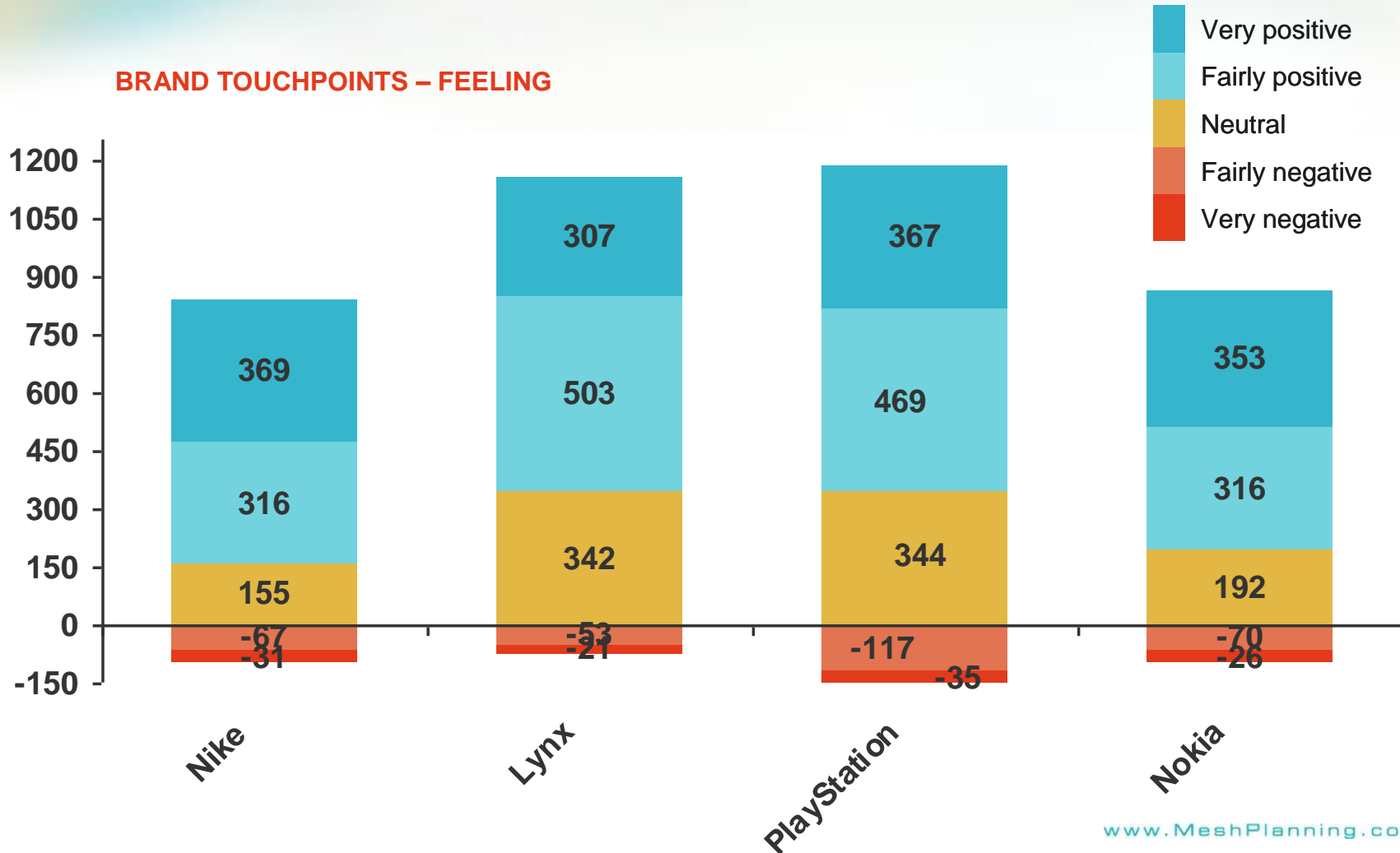
TV kicks in first, followed by posters and press



Base: 1226 Lynx/AXE TouchPoints

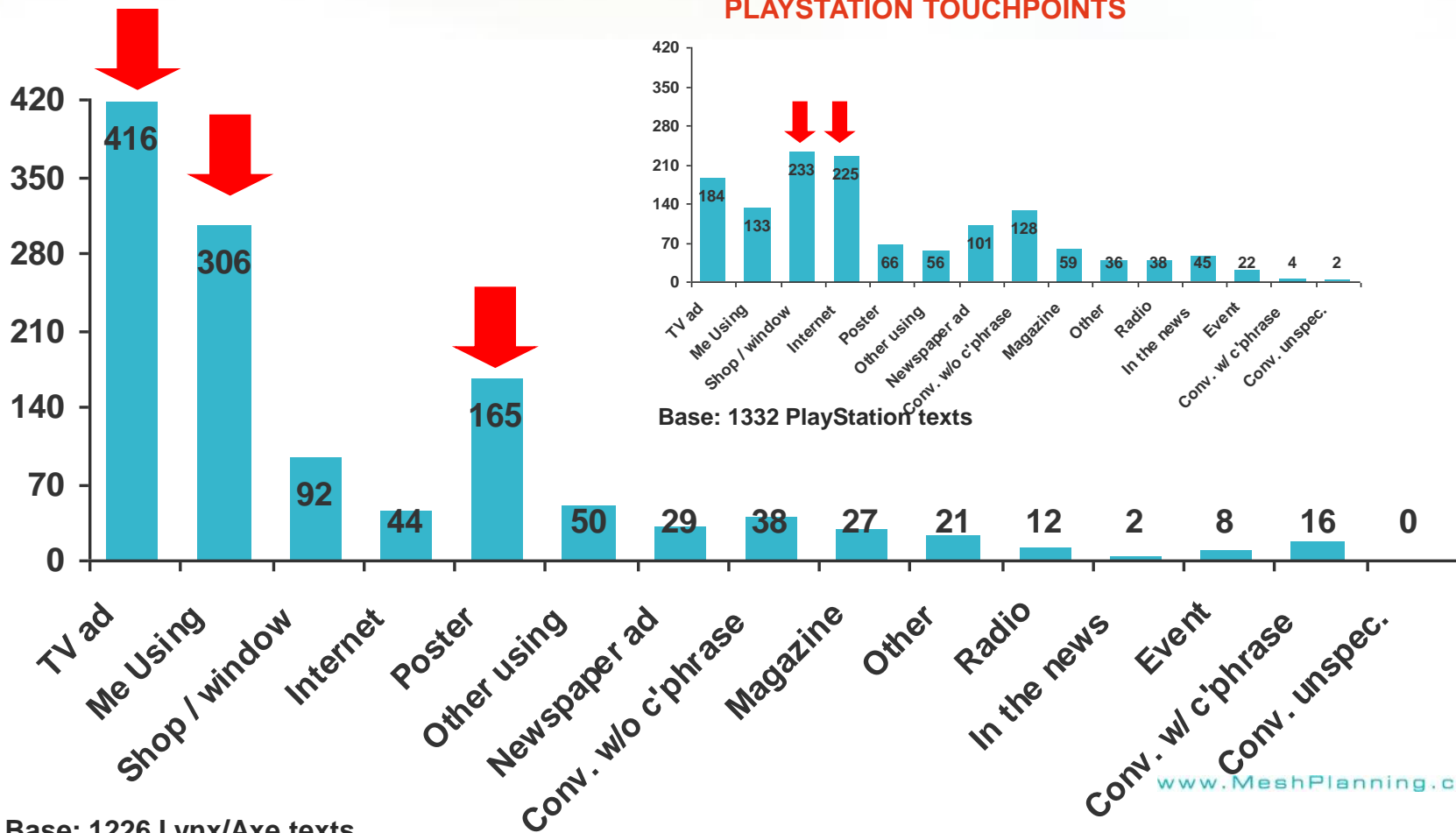
Lynx/AXE has more % positive touchpoints than PlayStation

BRAND TOUCHPOINTS – FEELING

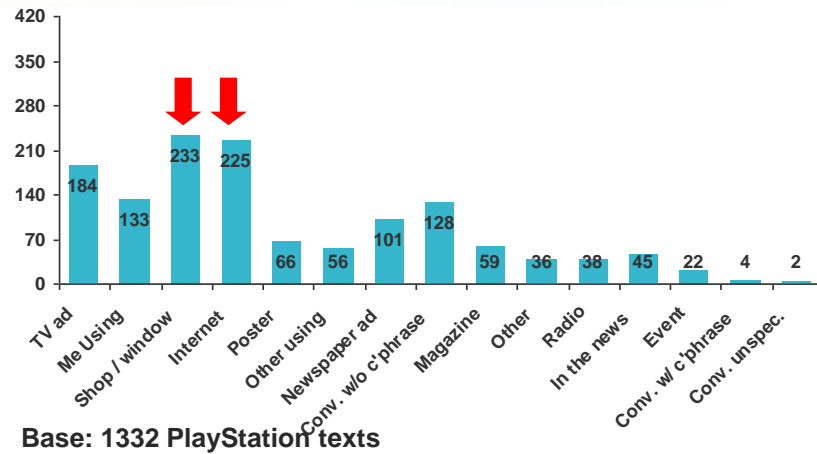


But the brands are connecting through different touchpoints

LYNX/AXE TOUCHPOINTS

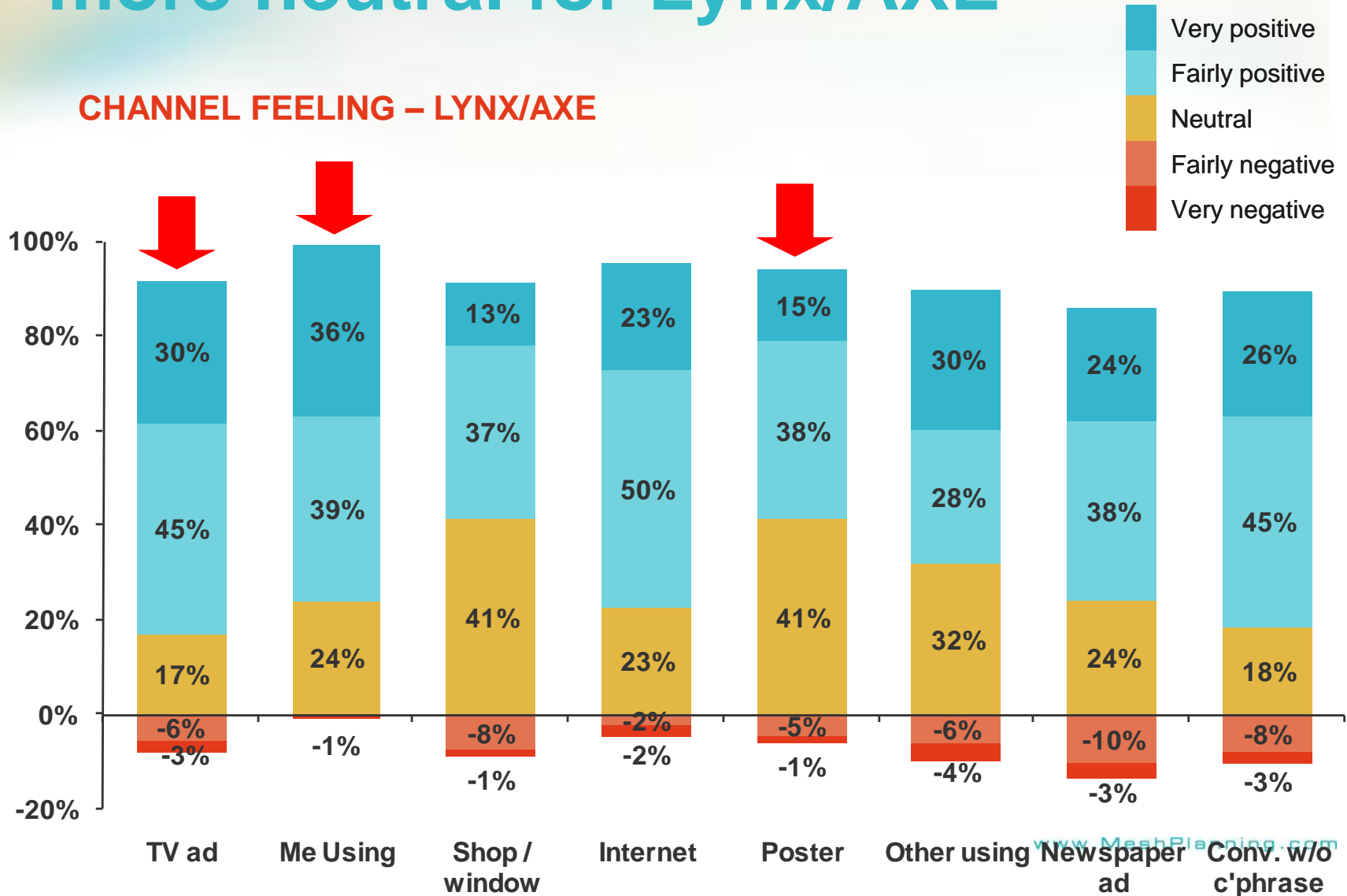


PLAYSTATION TOUCHPOINTS



Positive TV and usage with posters more neutral for Lynx/AXE

CHANNEL FEELING – LYNX/AXE



1530

Base: 1226 Lynx/AXE texts

www.MeshPlanning.com

Lots of very positive comments for the TV ads

“Makes me laugh, you nearly always repeat the catchphrase.”

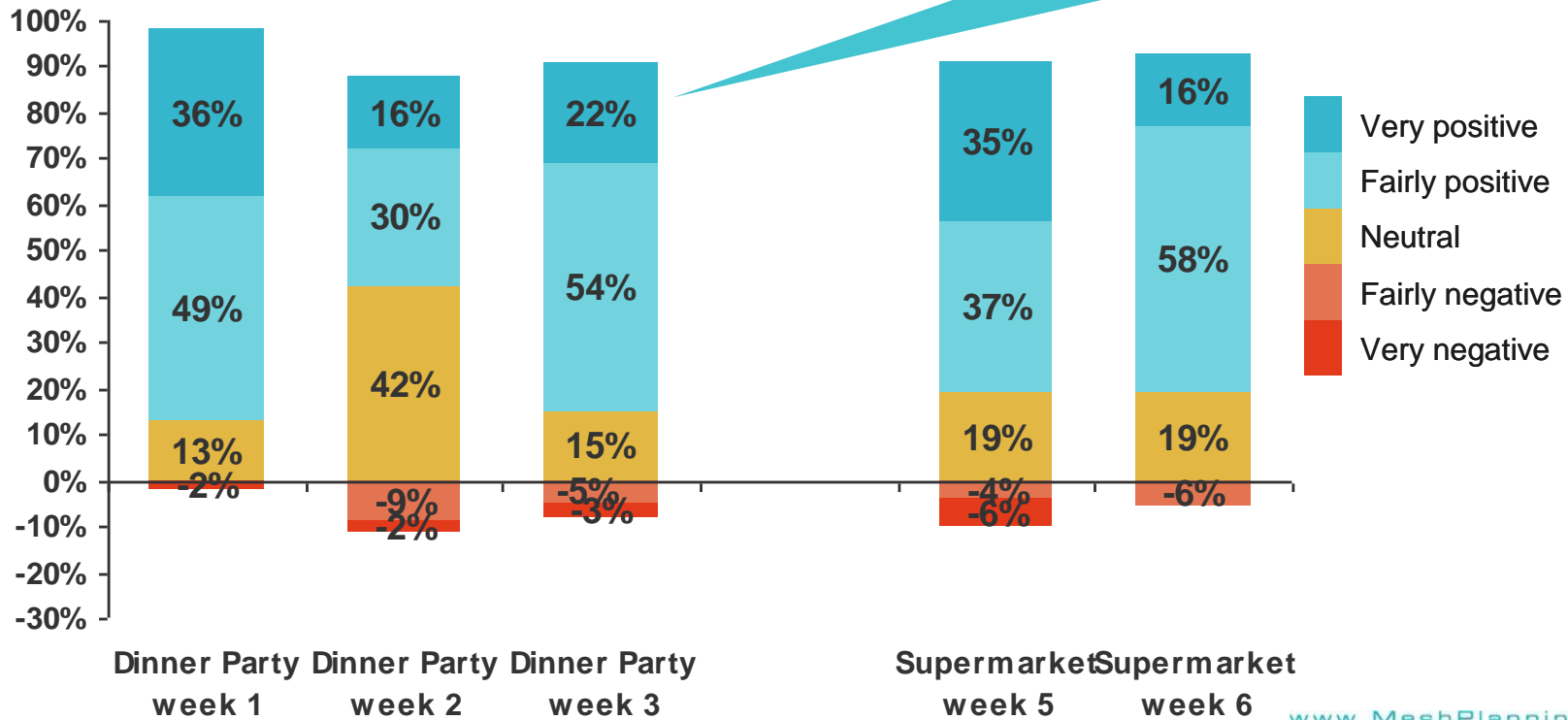
“Saw advert which is very funny. My dad finds it offensive, which is also very funny, so I annoy him with the catchphrase.”



But needs quick refreshment!

“Saw the bom chicka wah wah advert again today...it’s getting boring now!”
1/4/07, 22:04

DINNER PARTY v SUPERMARKET EXECUTIONS



Base: week 1 – 45, week 2 – 43, week 3 – 91, week 5 – 52, week 6 – 31

Posters remind of ad but are more neutral



"In town with friends. Saw the poster at a bus shelter. We were copying the advert. Funny." (very positive)



"bom chicka wah wah – kept seeing the same poster over and over again. It was kinda bland, but obviously eye catching." (neutral)



Seeing with others enhanced potency



March 22nd, 2007, 08:55
Lynx, Poster,
Fairly negative

“No one wants to think about 70’s porn on their way to work in the morning.”



Same participant



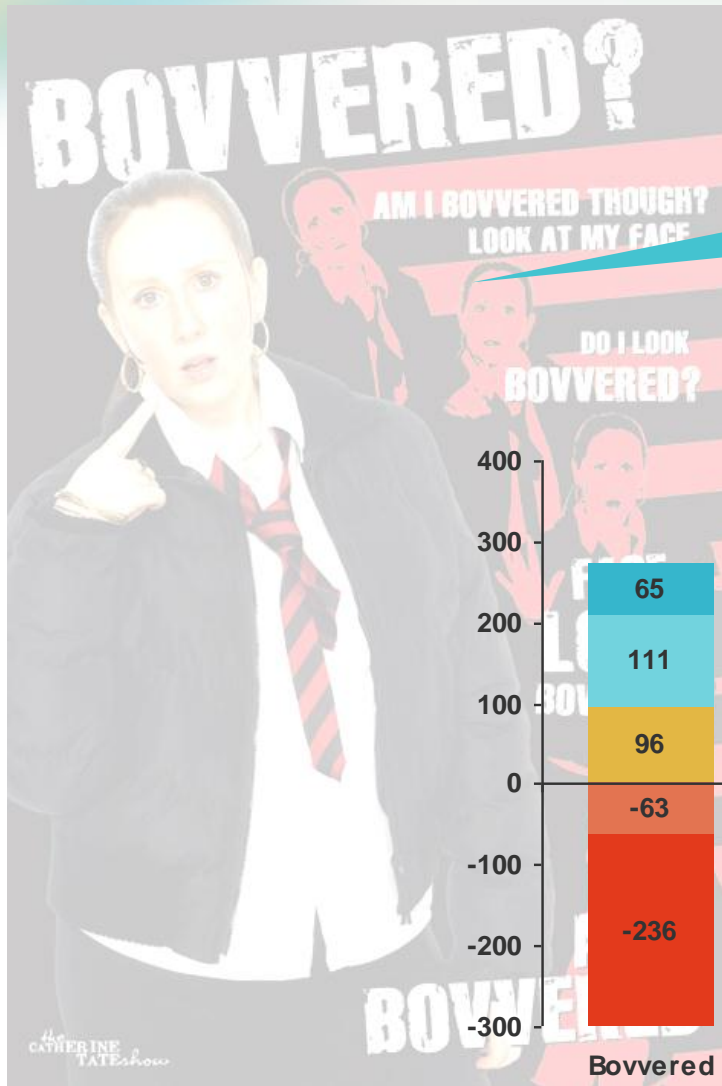
March 22nd, 2007, 14:22
Lynx, Poster,
Neutral

“On way back from lunch with a few mates.
Poster was less unappealing.”

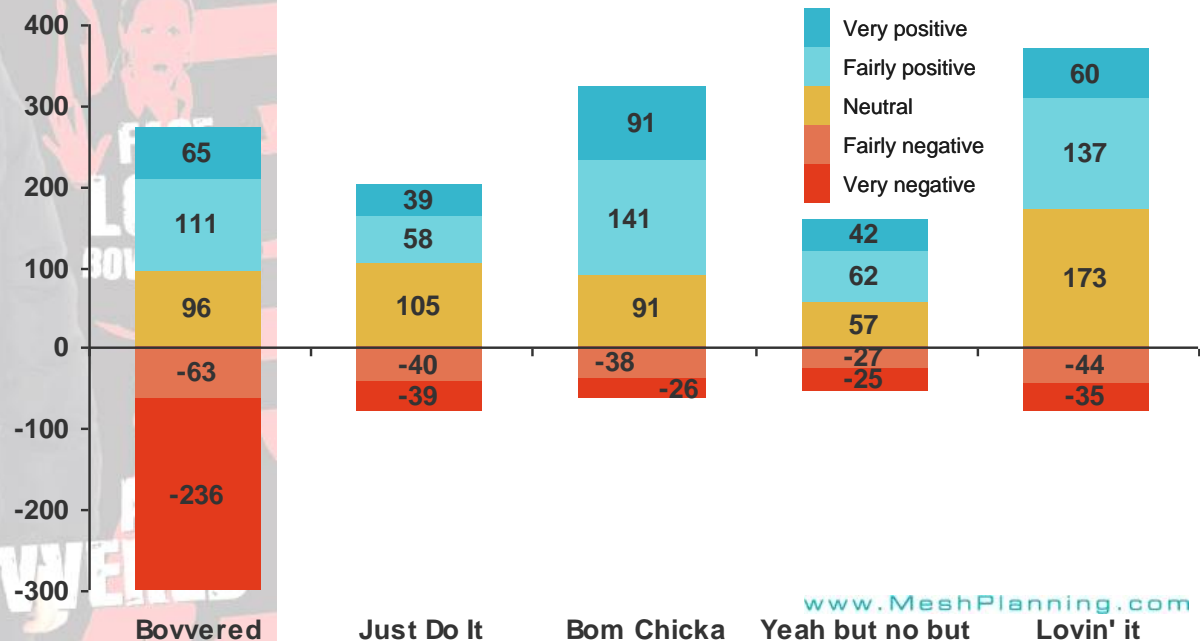


Risk of catchphrase wear out

“Hate this catchphrase and the people who use it.” (Girl(s) Using, Very Negative)



CATCHPHRASE TOUCHPOINTS - FEELING

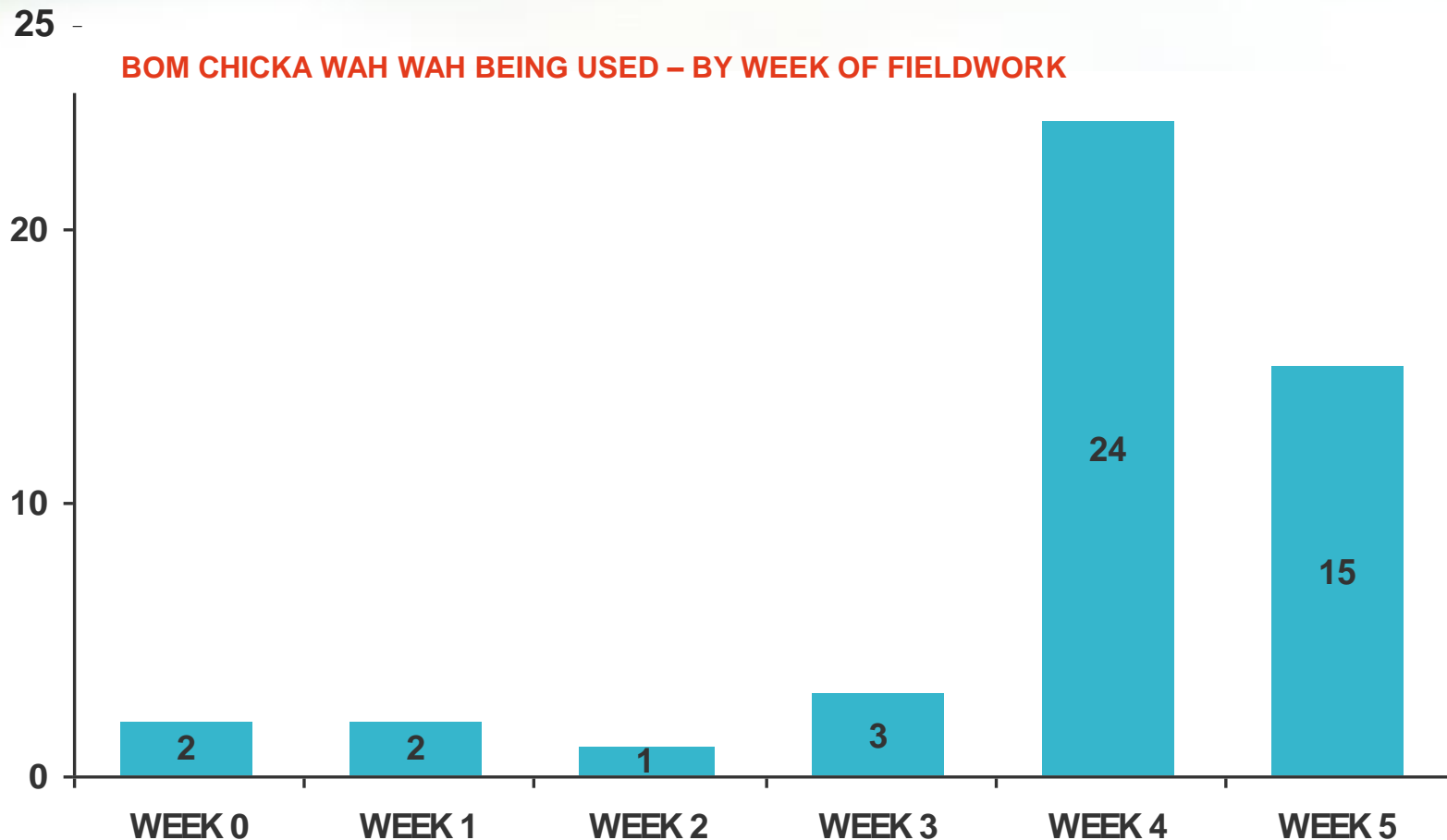


Although Tony Blair gave Bovvered a boost!



“On breakfast news,
Tony Blair sketch for
Comic Relief, funny.”
(fairly positive)

By Week 4 Bom Chicka Wah Wah had taken off



Base: 52 Bom Chicka Wah Wah being used texts (Catchphrase stream) (Note very low sample size)

Used in social networks

▼ Status

1 update this week.

[See All](#)

Danielle is feeling very Bow Chica Bow
Wow!!!

Updated 17 hours ago

▼ Friend Details

[edit](#)

“Noticed a friend’s status on Facebook had the Lynx catchphrase...naturally I had to sing it out as well.”

Being played with...

“Bah chicka waw waw”

“bowchachawowow”

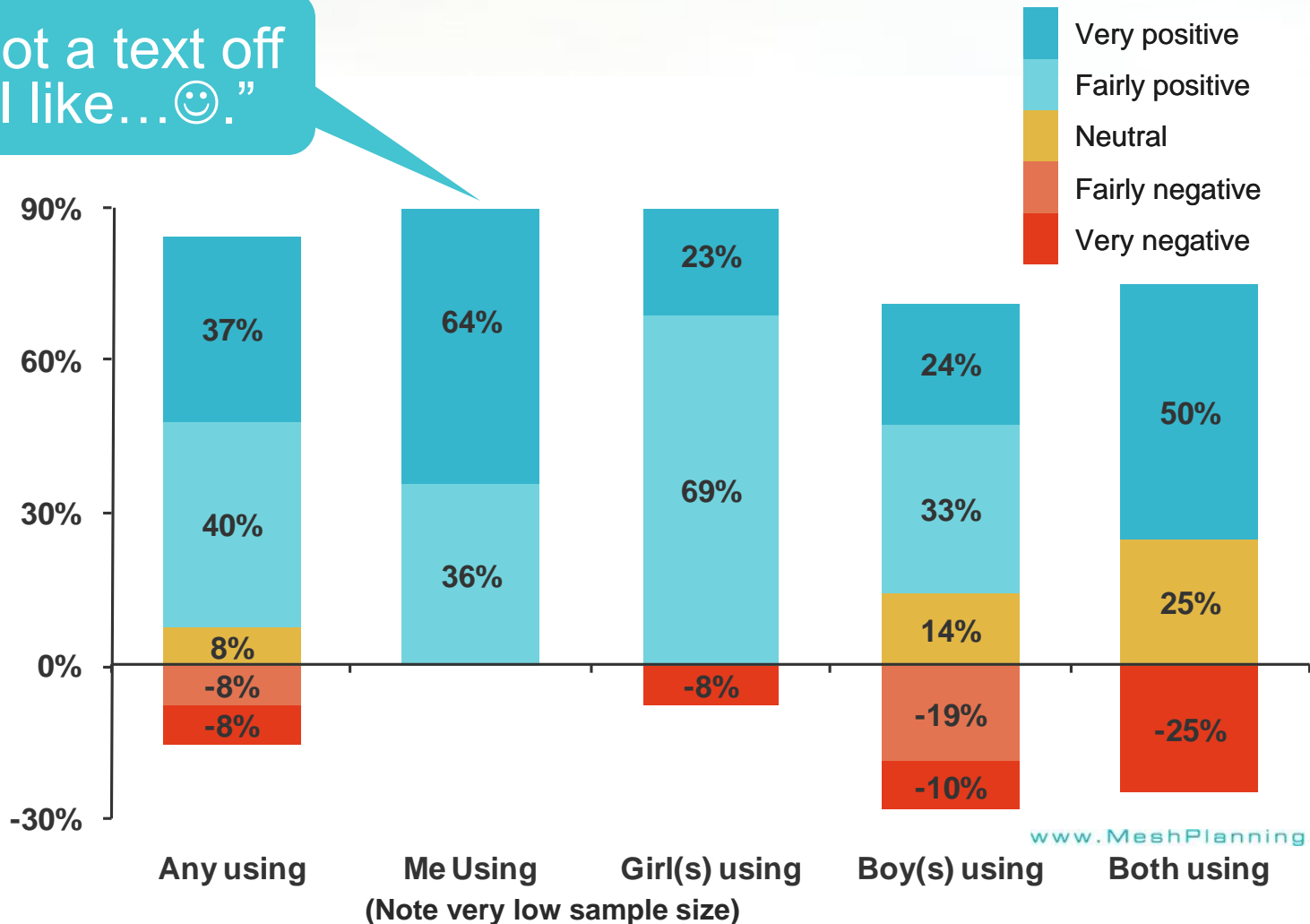
“boom shakalaka”



Most positive when used yourself or by girls!

CATCHPHRASE USAGE FEELING - BOM CHICKA WAH WAH

“Just got a text off a girl I like... 😊.”



Kelly Brook attracts attention...



“Advert in the Sun newspaper. It was really **colourful**, not something you would expect to be associated with a deodorant advert! ...it had a picture of a **lady in a dress** on the front.”



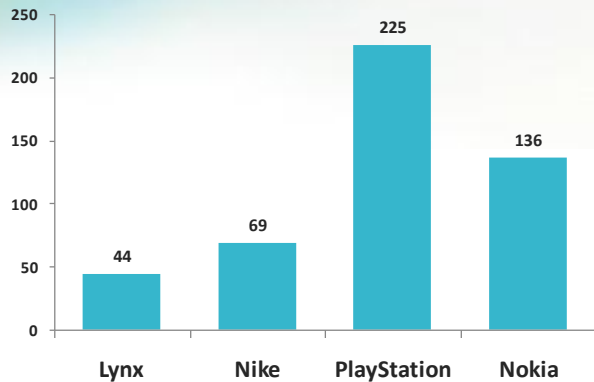
“Kelly Brook on a poster, **wow, beautiful.**”

BUT isn't linking to core campaign

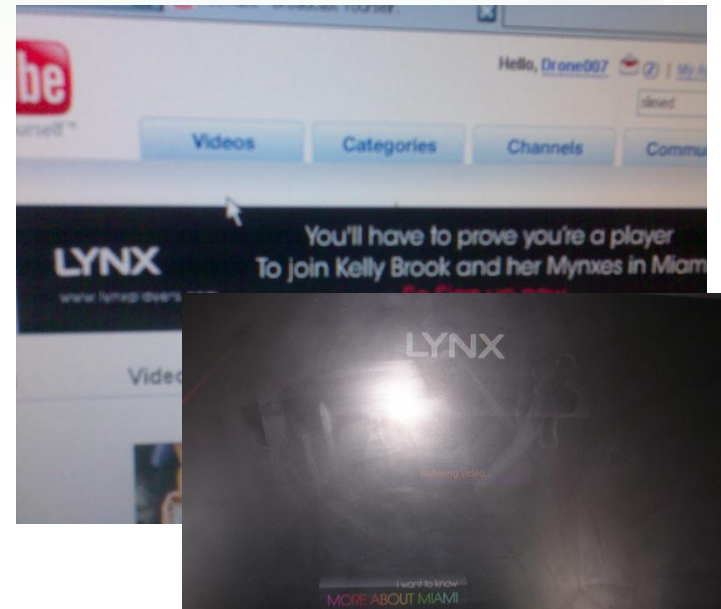
“I was visiting Manchester at the weekend and a billboard outside Old Trafford Stadium was advertising a link to the website and some offer/competition with Kelly Brook. I wanted to visit but **can't remember the website name!**”

A variety of digital touchpoints – but could work harder

Internet touchpoints for each brand



Fewer online touchpoints than for other brands



Social networks

“At my friend’s on internet it pop up that at Superdrug it was down in price. It made me go get some before it go back up.”

Retail price ads

Only small amount of evidence that activation was being picked up

New fragrance and packaging performing strongly



"I saw an ad in Maxim magazine with a sniffer sample thing and it smelled nice."

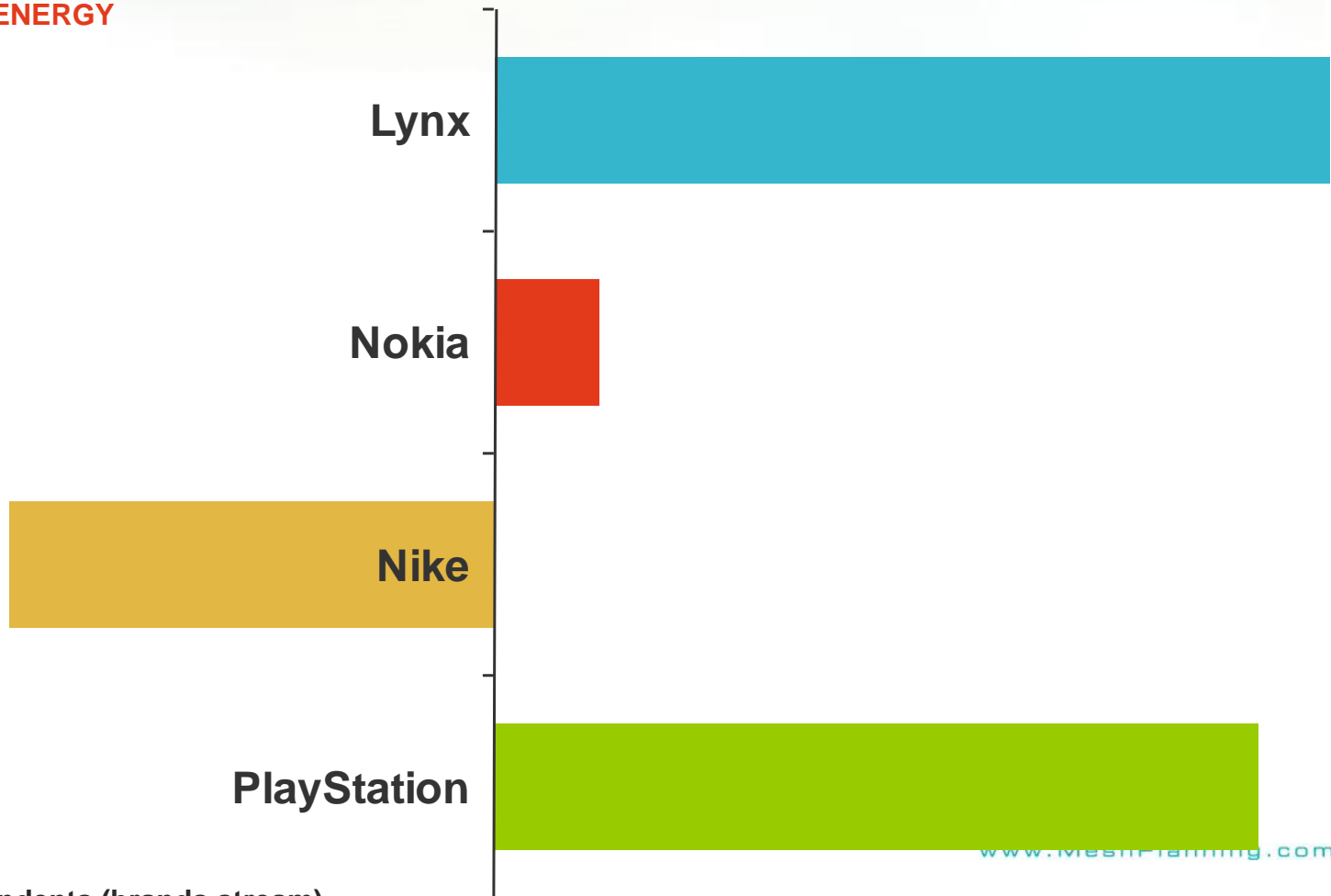
"New shape can, new smell, attracts the girls"

"That they have a new can design, which is better when its in your bag as it won't go off, that they look really cool in blocks."



Overall Lynx and PlayStation shift positively in favourability

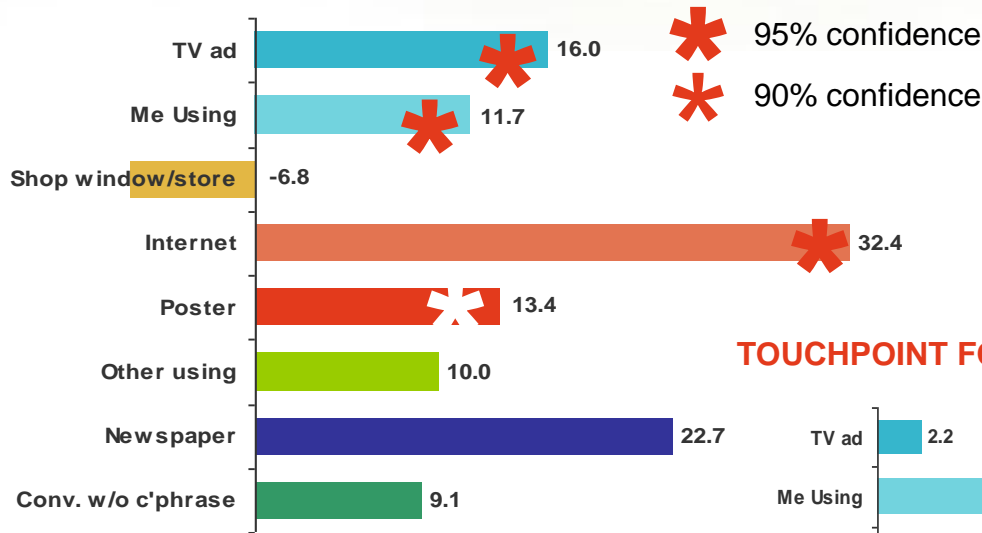
BRAND ENERGY



Base: 428 respondents (brands stream)

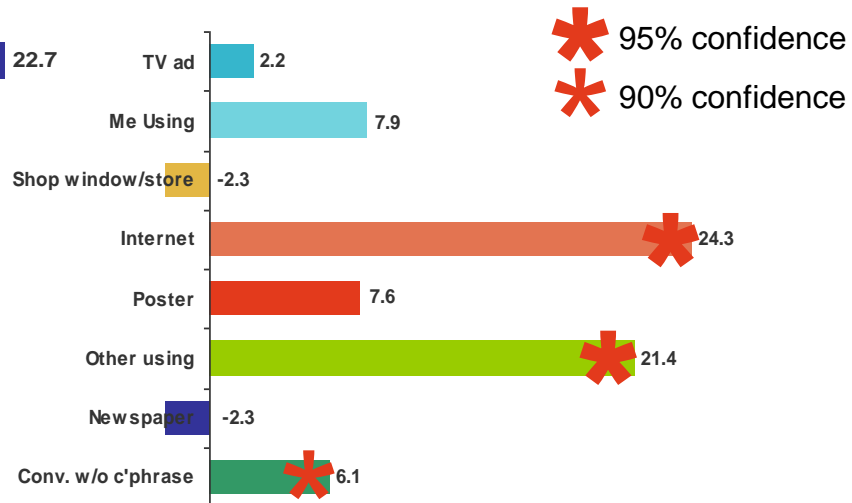
TV/Poster effects 'fun' with Usage effecting 'expert'

TOUCHPOINT FORCE IT IS A BRAND THAT IS FUN – LYNX/AXE



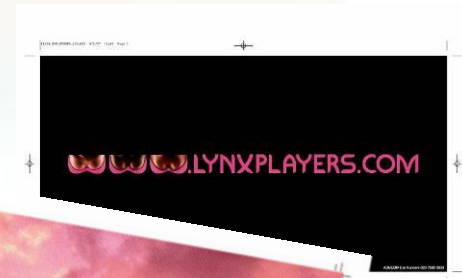
Base: 428 Respondents (Brands stream)

TOUCHPOINT FORCE IT IS A BRAND THAT IS EXPERT – LYNX/AXE



Base: 428 Respondents (Brands stream)

In summary



TV and Posters worked well in combination, but frequent refreshment needed to prevent wearout

Variety of digital touchpoints picked up but could work harder

Whilst Kelly Brook was a great spokesperson for Lynx, activation was working less strongly as not linked to core theme



New Product & Packaging was appreciated



The impact of promotional activity

Strong campaigns in Italy and Poland



**Italy
only**

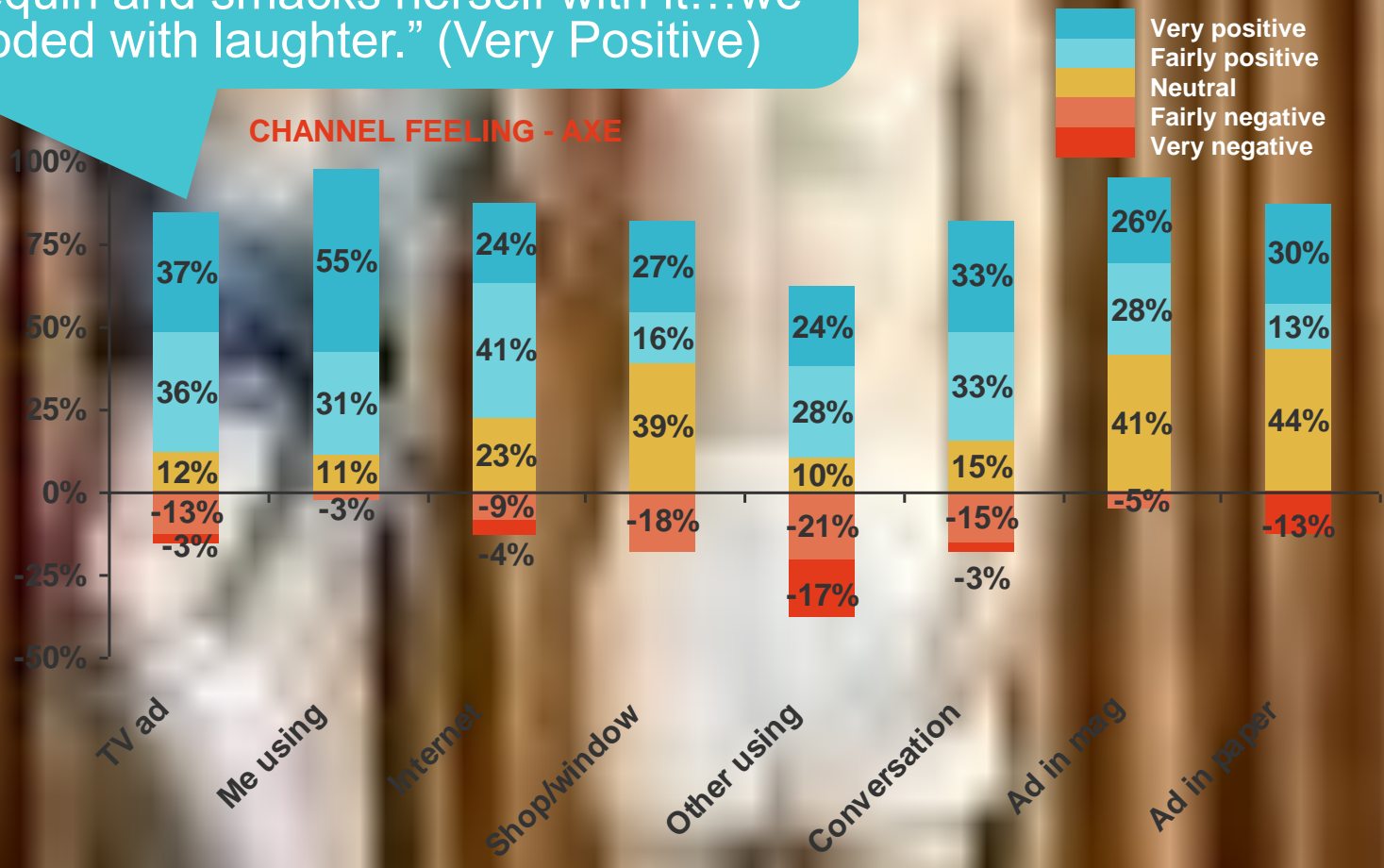


**Poland
only**

**What was working in Poland
that could help Italy?**

TV ads are also loved in Italy

“We were having a break in one of my school friend’s house when we saw the ad where the young woman detaches an arm from the mannequin and smacks herself with it...we exploded with laughter.” (Very Positive)

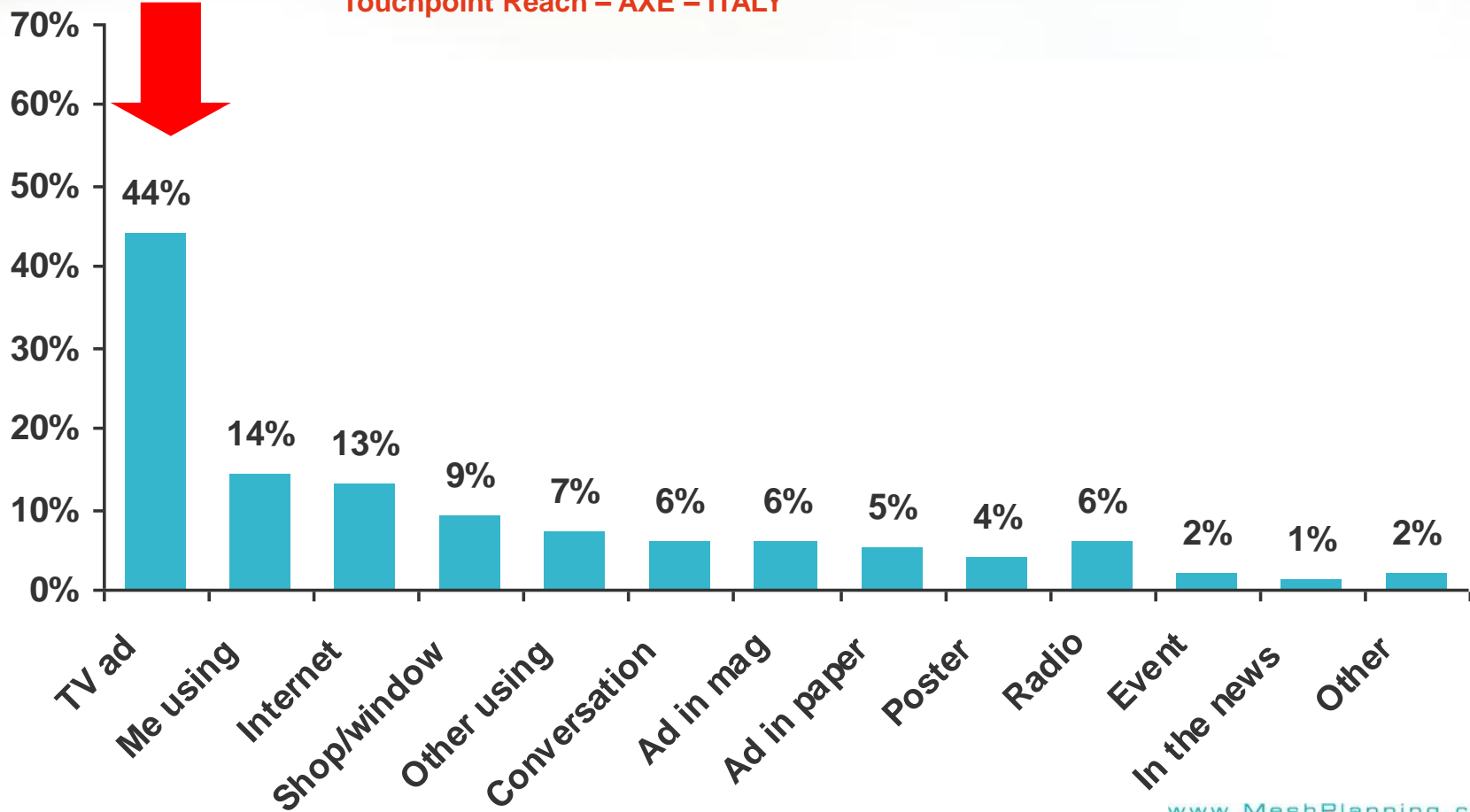


As is the fragrance

“Today after my shower I tried the Axe deodorant. I was pleasantly surprised by its pleasant and intense smell but it wasn't too strong. I also liked the packaging. I would recommend it. Ciao.” (Very Positive)

But campaign relied almost exclusively on TV

Touchpoint Reach – AXE – ITALY



In Poland we saw Villa Axe mania!



TV



Internet



Press



Poster



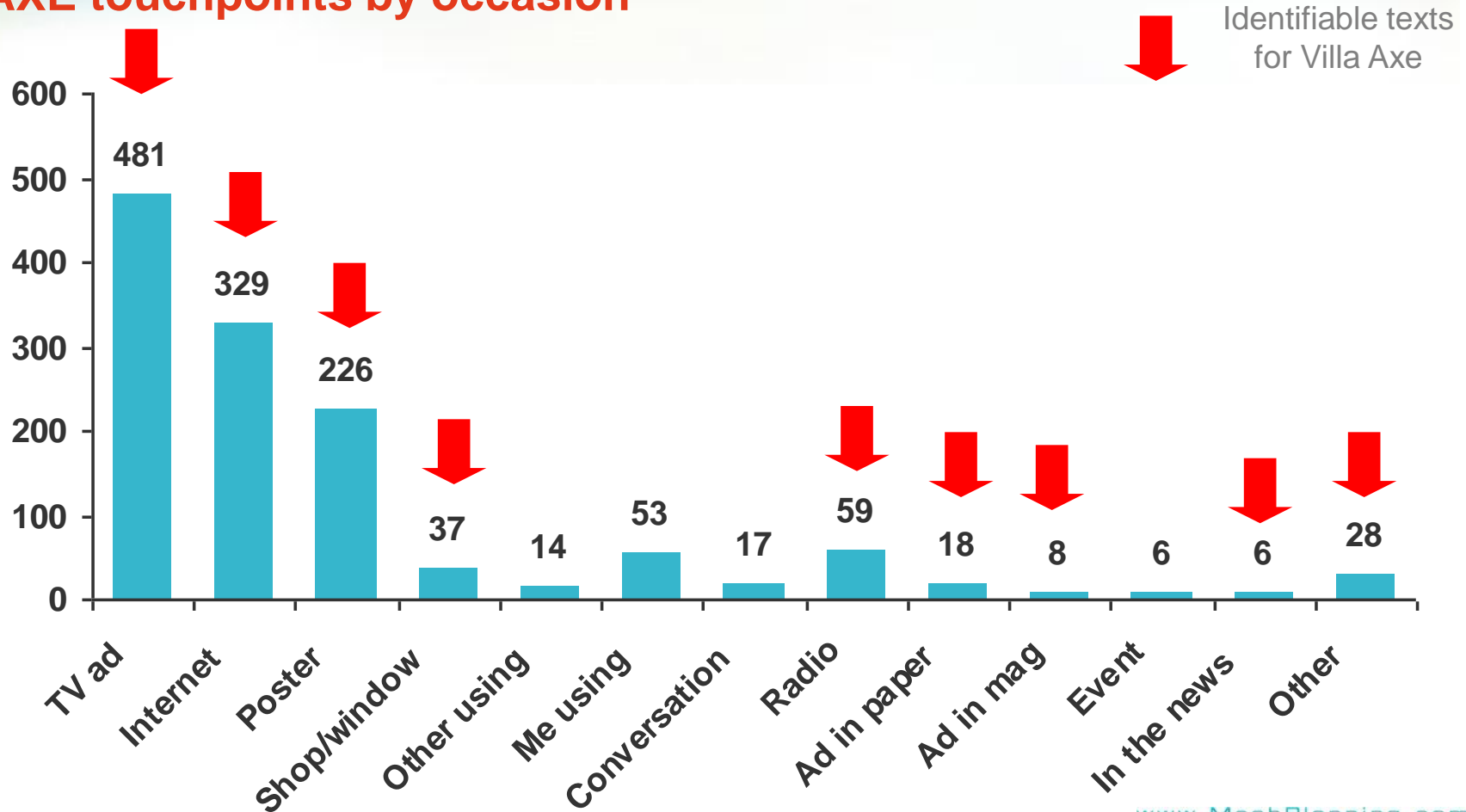
Also Radio,
PR, Other



In Store

Virtually all touchpoints had identifiable texts for Villa Axe

AXE touchpoints by occasion



Axe is playing as a social brand

Personal care market



Personal
Internal focus
Low touch

Style and image market



**Axe is a personal care brand
which could borrow its
values from other more
social sectors**

Social
External focus
High touch

Where In Store experiences were positive



"It's a fantastic thing to be able to try the console in store. What particularly struck me was the quality of the material, design, resolution of the images all thanks to using the LCD HD." (Very Positive)

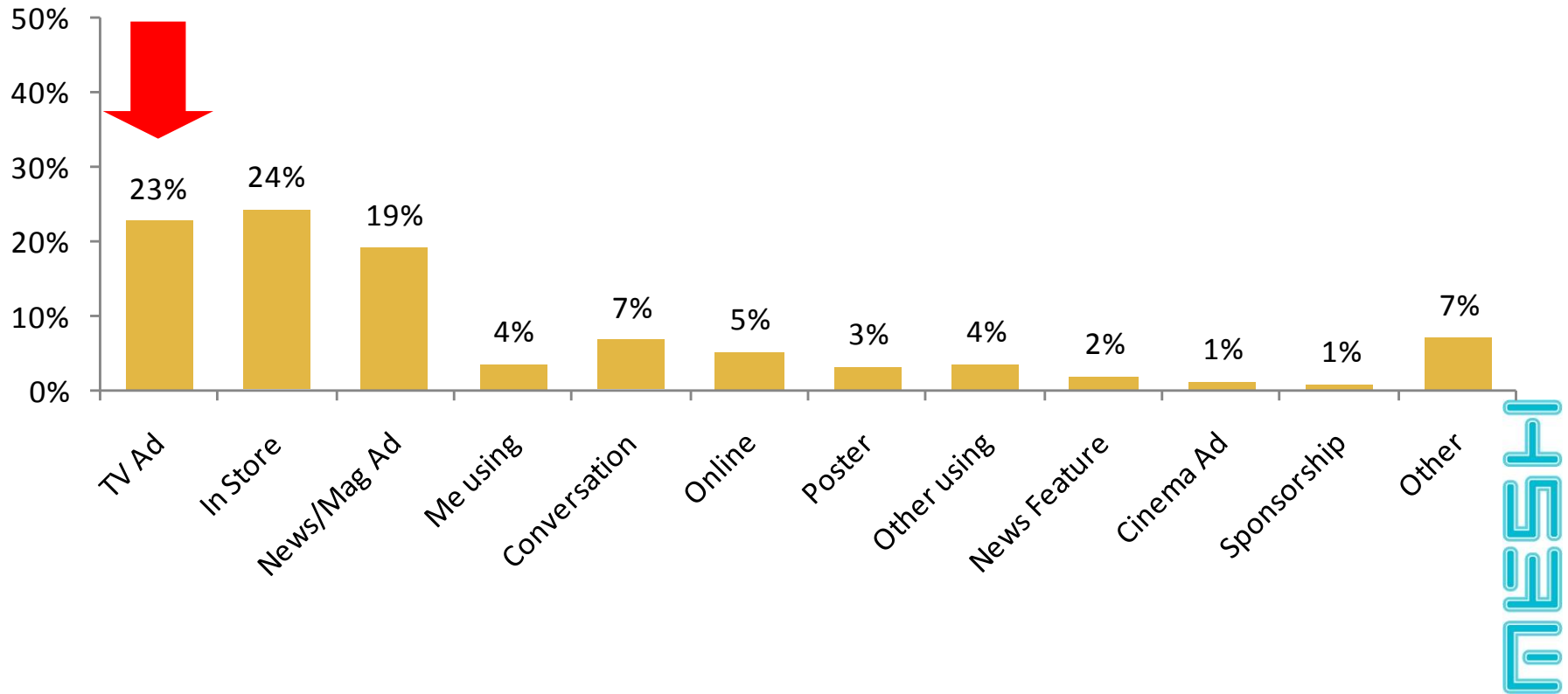
...whereas Italian guys were not going into supermarkets

Key Learnings for Italy

- Whilst TV advertising was well liked...
- There was a disconnect between arousing interest and actual purchase
- Social brands gave us the clue that, with Italian guys not going into supermarkets (only 9% touchpoint reach), we needed
 - New distribution channels
 - Heavy sampling and activation, like Poland

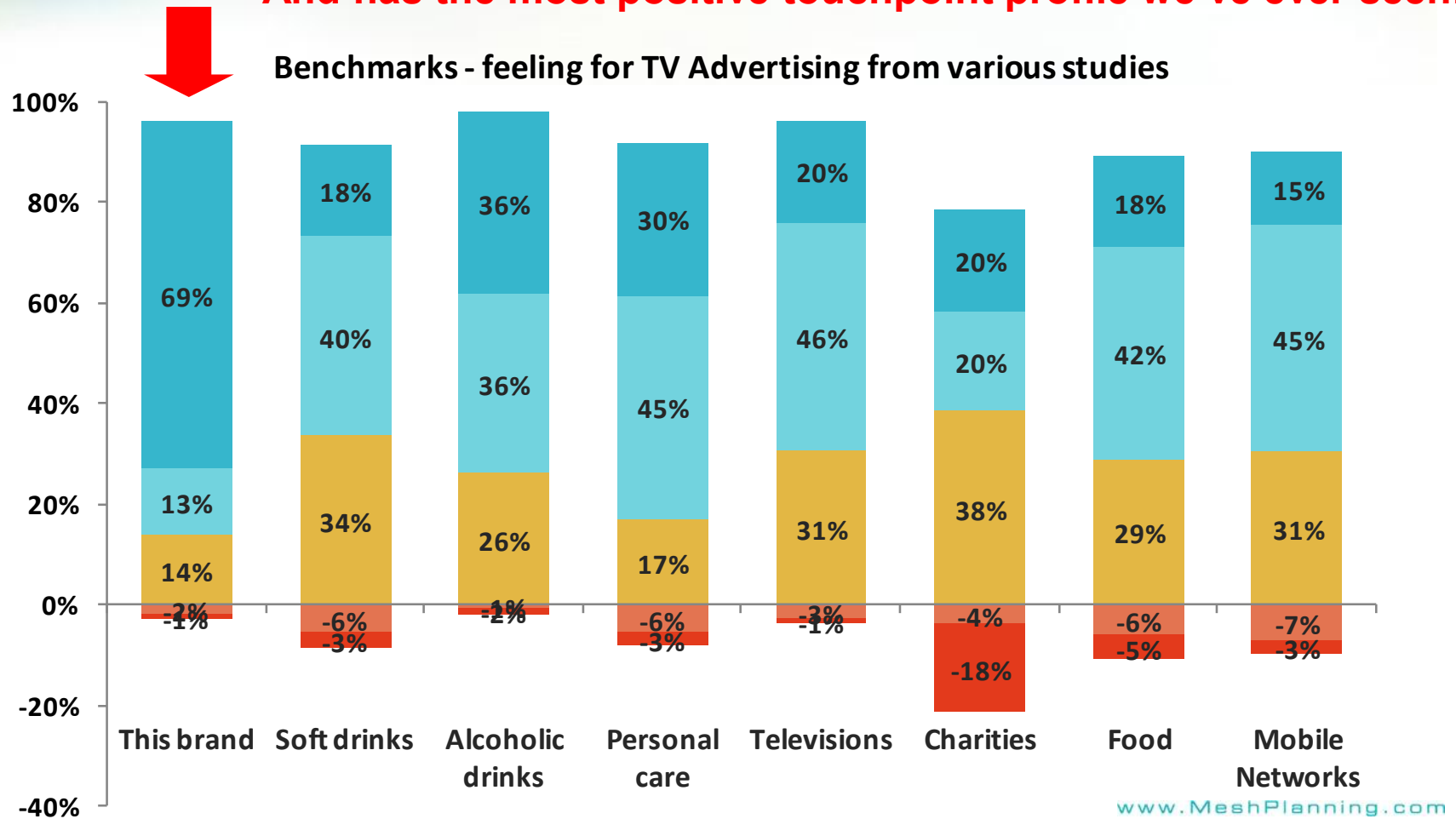


Brand A had no TV ads on air



But it featured in Sainsbury's, Morrisons and Somerfield ads

And has the most positive touchpoint profile we've ever seen!



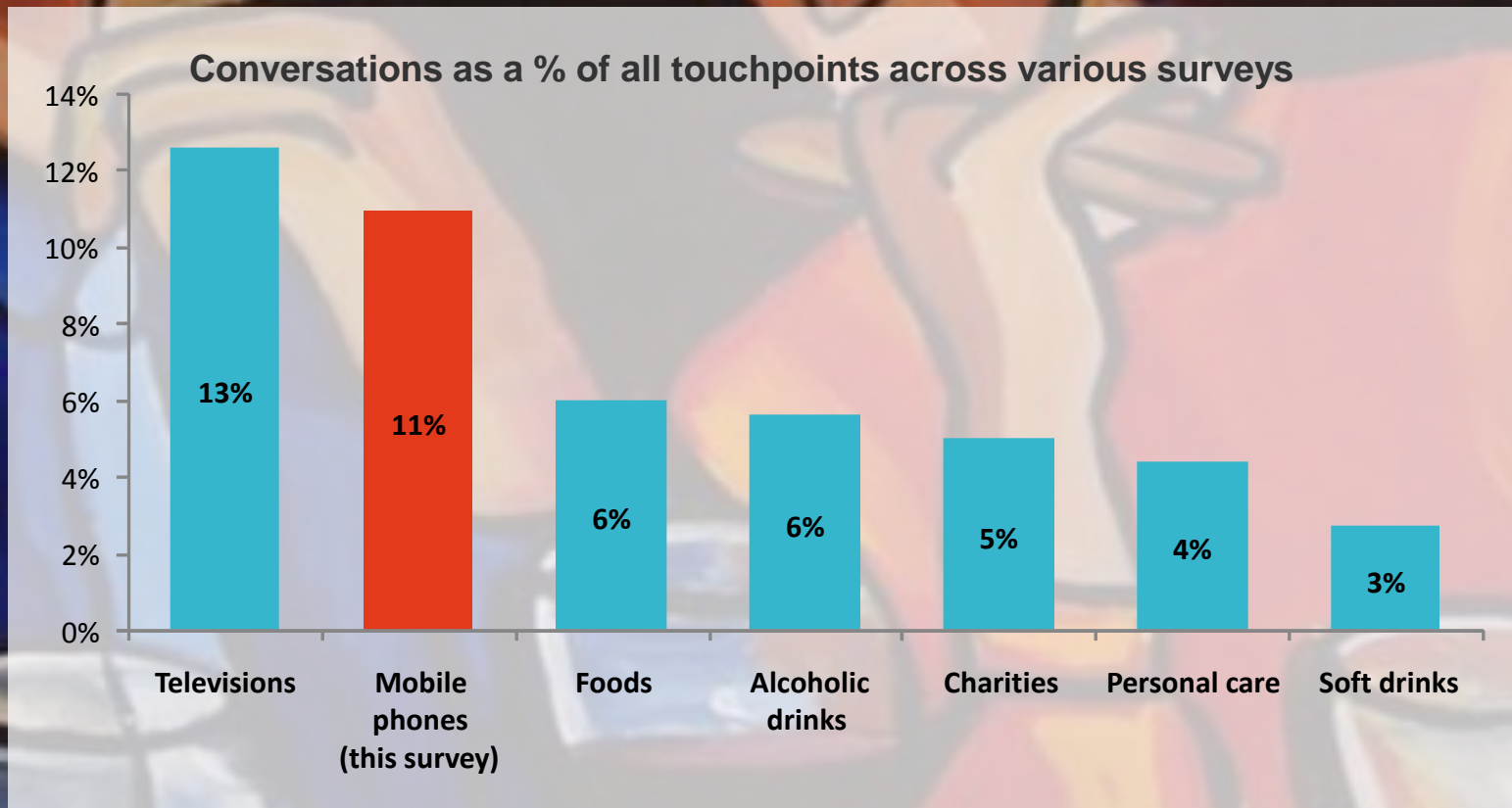
Price cut was associated with supermarket not brand

The Christmas push is on ***at the supermarkets***. It appears ***they are willing to sell xxx as a loss leader*** to install incentive in the consumer to come to their stores.

The customer journey, WOM and influencers



Some markets have more WOM than others



Prompts for conversation in mobile networks included...

Coverage

“Talking about Orange reception compared to T-Mobile and O2. Orange came out very well as I had full signal and the others had no signal at all.”

Orange, Conversation, Very Positive

Contract renewal

“A few of us have contracts ending in November and we were chatting about upgrades and we chatted about staying with O2 or not.”

O2, Conversation, Very Positive

New features

“Discussion with a friend about his 3 phone and network. Very positive. Says they have excellent coverage and features including a panoramic view camera. I have always been interested in 3 but have not swapped yet.”

3, Conversation, Very Positive

Experiences

“Speaking to a friend about good service I receive from O2. Just been given treat of extra 20 free minutes a month for 3 months.”

O2, Conversation, Very Positive

Offers

“My friend was telling me about an offer she received through the post.”

T-Mobile, Conversation, Fairly Positive

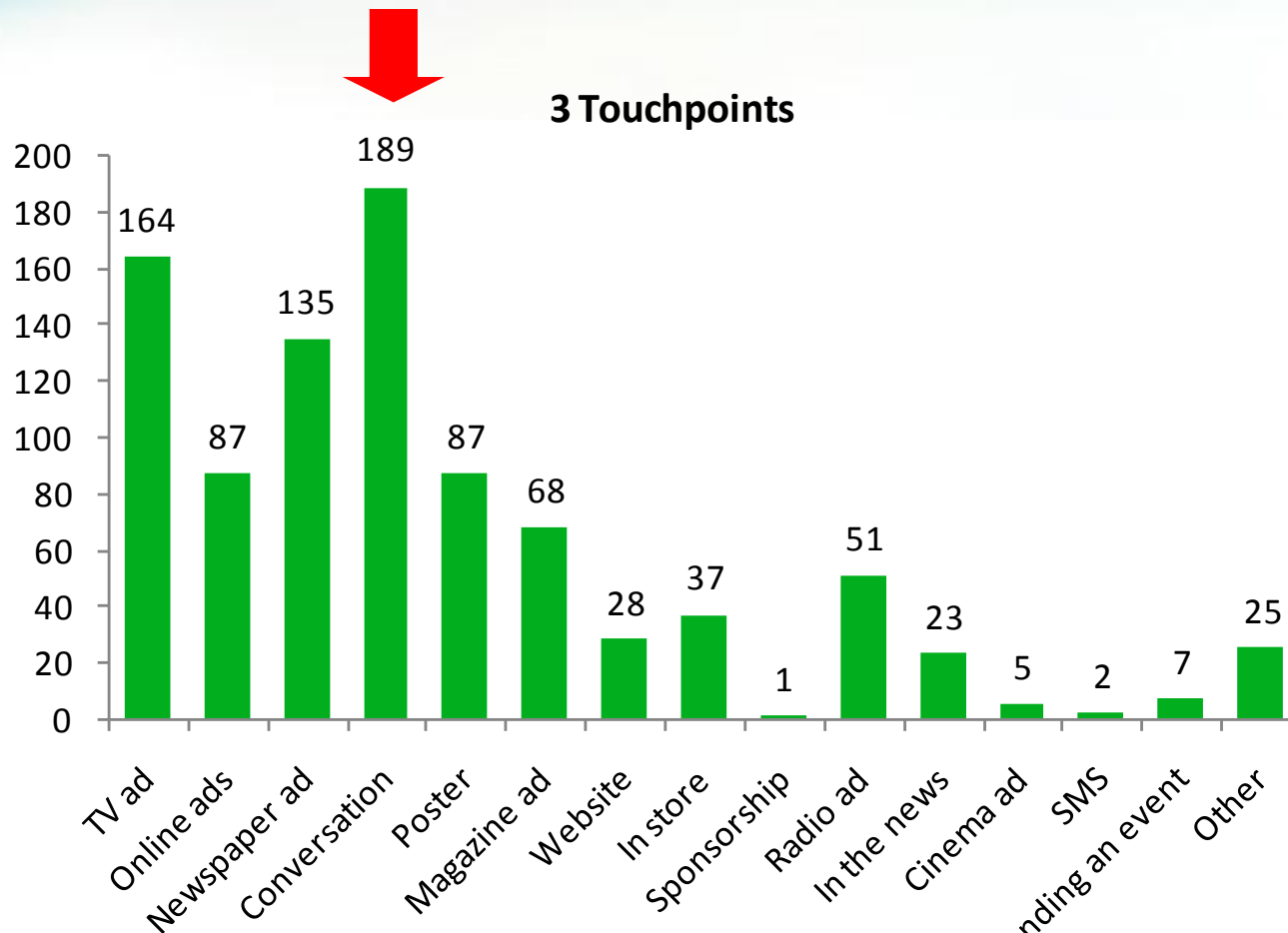


Other prompts included bills, need to top up, poor handling of complaints, stolen phone, even phone flushed down toilet!

ishPlanning.com

Source: TROI study for Vodafone

During October 2007, 3 generated lots of WOM



October 12th – November 8th 2007

www.MeshPlanning.com

Source: TROI study for Vodafone



Major innovation being discussed

Innovation through **mobile broadband and Skype**

“This was the second 3 ad in the edition of the Metro I was reading on the train travelling to work. It was the first time I had seen Skype for a mobile phone. It raised my attention. Black and white ad, not very bright.”

3, Newspaper, Fairly positive

Free phone. Free Skype calls.

Skypephones

£12 a month. 100 mins or texts

£15 a month. 300 mins or texts

Pre-order your 3 Skypephone today

Get Skype freedom

- Easy to use - get free Skype calls anywhere in the world at the touch of a button
- Have no Skype share always on
- Fully loaded phone with a 2 mega pixel camera and MP3 player
- Call and text with your broadband bundle, just like a regular phone

Call free 0800 358 9041

Go to three.co.uk/metro or visit a 3Store

Free for 3 months

Houses and purchased

Sell and stay in your home if free or at a low rent. 100% leg fixed terms available for mon

Any property or p

Vacant or rented nationwide with planning, legal or te

No surprises in our

We typically pay 80% of

NEW 100% market

Take a 10 year fixed-term and we'll pay 100% of

An ideal

Clear debts, buy for ca

An alternative to brid

A sale the w

Free appraisal, no legal costs paid. C

24 hours if required

It's easy, it's fast - c

0800 035 swiftcapital

From interest to action

3, Newspaper ad, Very Positive, 26th October, 11.43am

*“Reading the Metro newspaper on my break I noticed **an ad for 3 mobiles new mobile internet card for laptops**. It seemed like a very good idea and was well priced.”*

Key Influencer!

3, **Conversation**, Fairly Positive, 26th October, 13.53pm

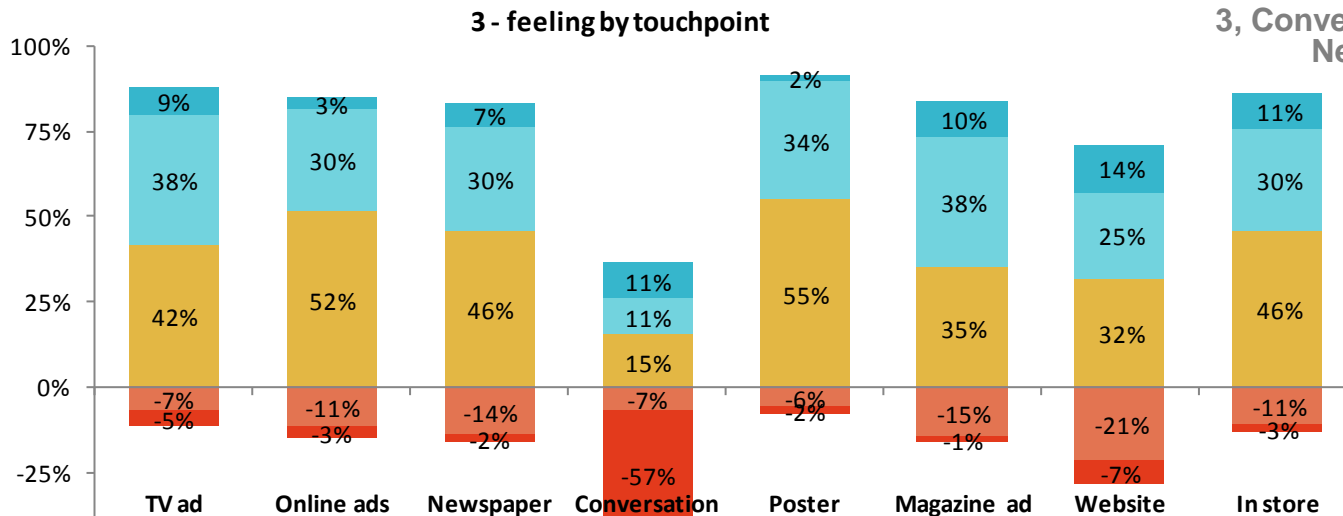
*“Conversation with work friend about the 3 laptop internet card I saw advertised earlier, **he had heard that this works much better and is also cheaper.**”*

3, Website, Very Positive, 30th October, 17.30pm

*“**Checked the 3 website** to find out more about the laptop internet card. Very surprised at the low prices.”*

It's not all good news for 3

Lots of **conversations are negative**



*“cancelled my contract today with 3, reception with motorola razor very poor and **network not good either**”*

3, Conversation, Very Negative

*“neighbour **complaining about being unable to access 0845 numbers on 3 network**”*

3, Conversation, Very Negative

*“my older son had so many **problems with an 3 deal** and couldn't get his money back for ages”*

3, Conversation, Very Negative

*“My friend was saying **how bad the customer service** is with 3, and what a bad experience she had dealing with them. I stated that I had similar problems in the past including the bad coverage.”*

3, Conversation, Very Negative

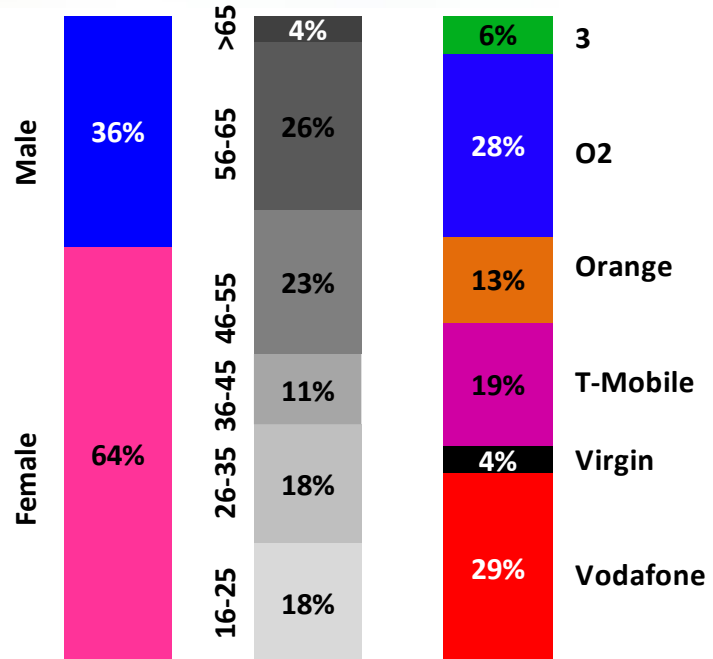
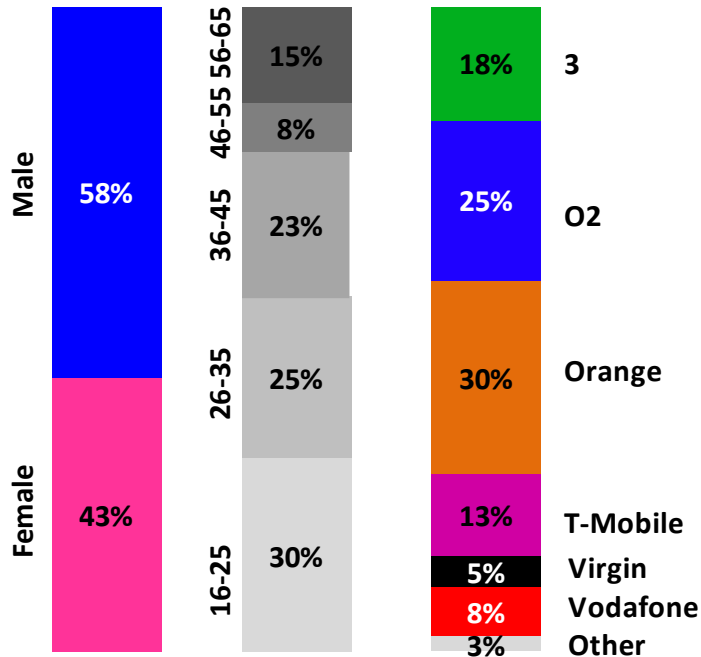
www.MeshPlanning.com



Who is having the conversations?

Positive conversations about 3 (40)

Negative conversations about 3 (120)



Mean Favourability Score

Pre 6.5 – Post 7.3

Pre 4.3 – Post 3.6

www.MeshPlanning.com

Source: TROI study for Vodafone

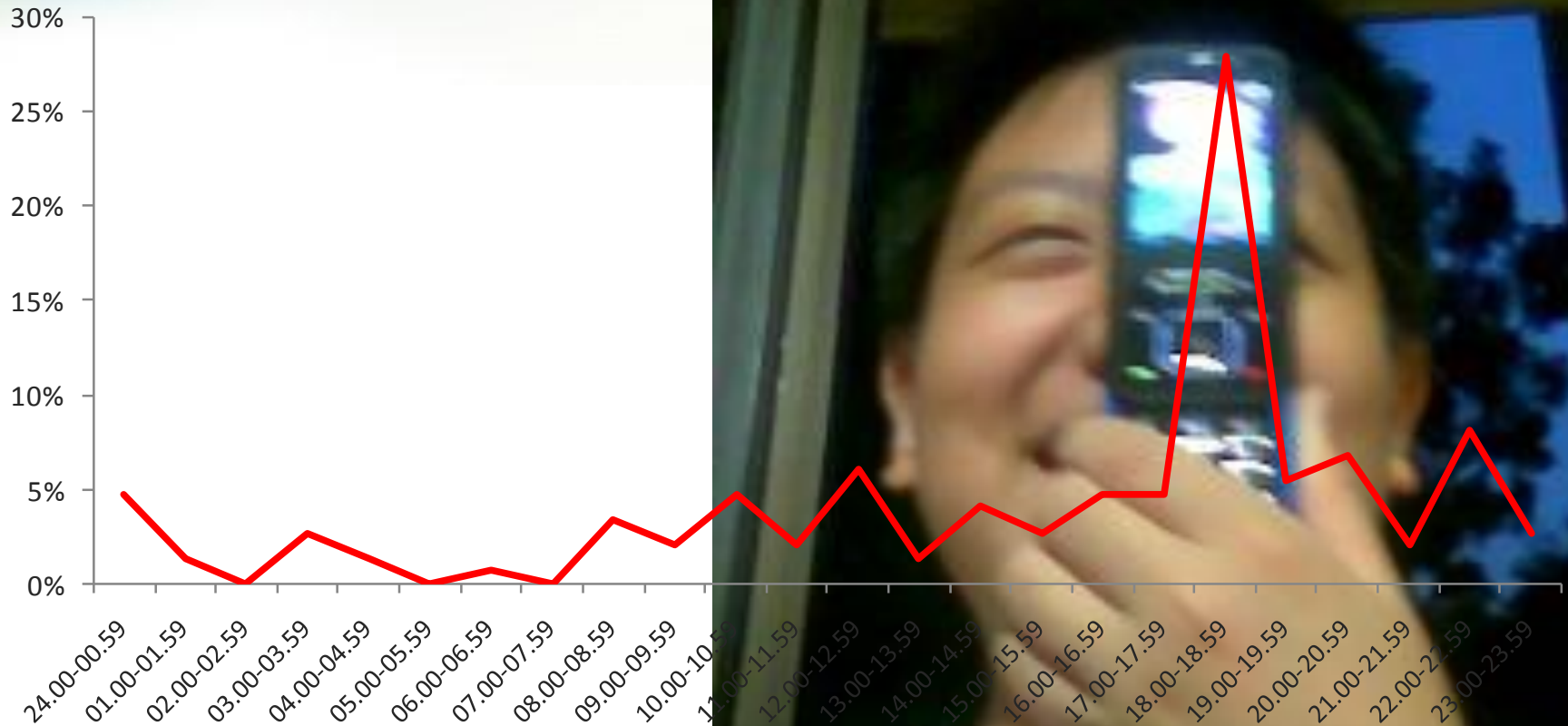


Mobile handset touchpoints in Singapore peak at 6-7pm



Everyone is using them!

Seeing other using, all brands, by time of day



Base: 147 Seeing other using touchpoints





This was seen in a MRT carriage train - pasted at the window. There are several of these posters in the same carriage. The orange colour makes it very striking against the night scene. Wasn't having any conversation with anyone on the train - I was on my way home from work.

The route to purchase

1.

Saw the new Sony Ericsson phone **being launched in newspaper advertisement**

14/03/08, 06.05am, Sony Ericsson, Newspaper, Fairly Positive

2.

I was standing beside an iPhone user in the crowded train. Seems like **iPhone has many useful features!**

17/03/08, 08.05am, iPhone, Seeing Other Using, Fairly Positive

3.

There's this roadshow event at M1 shop. The person showed me the latest Sony Ericsson phone W890i. **So Sleek and slim!**

18/03/08, 13.15pm, Sony Ericsson, Roadshow/Event, Very Positive

4.

I finally **own the latest Sony Ericsson phone W890i!**

19/03/08, 14.06pm, Sony Ericsson, Other, Purchase Very Positive



“New Tools for a New World”

- The power of *experience data*
 - Particularly when combined with response and transactional data
- *New metrics*
 - Touchpoint Share, Reach, Frequency, Positivity, Cost Per Touchpoint
- Ability to understand the *emotional response*
- Puts *direct marketing into context*

Thank you. Any questions?

- Please contact me...

Fiona Blades

MESH Planning

fionablades@meshplanning.com

+44 20 7788 4007

+44 7979 808 758

