



Profiting from improved IMC: Fox Films

Profiting from Experience Excellence, Cranfield School of Management,
Thursday 10th September 2009

Simon Falconer, Microsoft
Fiona Blades, MESH Planning



New client challenges



Think more digitally you say?

Demonstrate digital ROI beyond response

Digital is more than the web?

‘Talk’ mobile, IPTV, gaming, & software

My world is integrated

Know how digital integrates

Real-time but real insights

Combine best of real-time metrics
with consumer-centric inputs



MESH was set up to address new client challenges

2. Measuring TV isn't enough, I need a **360 evaluation** to see how each marketing element is working

3. We need an '**early read**' on campaigns to avoid wasting money

1. Our **brand tracking** measures get used in documents but **don't drive decision-making**

4. I need a '**deep dive**' into how people are connecting with my brand and category - what's really going on

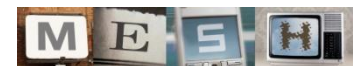
5. With budgets being tight, I need research that delivers **twice the value for half the cost**

6. I'm looking for a **flexible approach that I can tap into** to address needs as they arise

MESH provides the new, multi-purpose, brand marketers research tool



Fast, relevant, actionable insight

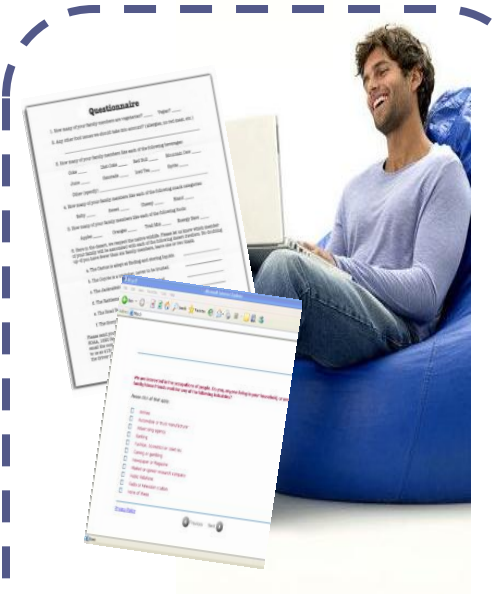


We do this in real-time using TROI*

19	Mon	20	Tue	21	Wed	22	Thu	23	Fri	24	Sat	25	Sun	26	Mon	27	Tue	28	Wed
----	-----	----	-----	----	-----	----	-----	----	-----	----	-----	----	-----	----	-----	----	-----	----	-----

Each participant is in the field for one week

Legacy Brand Health



Participants complete a Legacy Brand Health questionnaire in advance of starting the real-time texting process. This contains the usual tracking measures plus other metrics.

Current Brand Experience



Participants text the brands and experiences they come across during their week in field. We agree the brand and experiences together.

Every other day participants are required to visit their SMS diary to embellish the experiences they have already texted about.

Future Brand Direction



After 7 days of texting and a final visit to the diary participants complete a Future Brand Direction questionnaire before exiting the survey. This is a good place to look into specific ad recall and diagnostics in more detail.

WWW.MESHPLAN.I



*Touchpoints Return On Investment

Real-time
data
collection

The flaws with recall

Decay



Reconstruction



Interruption





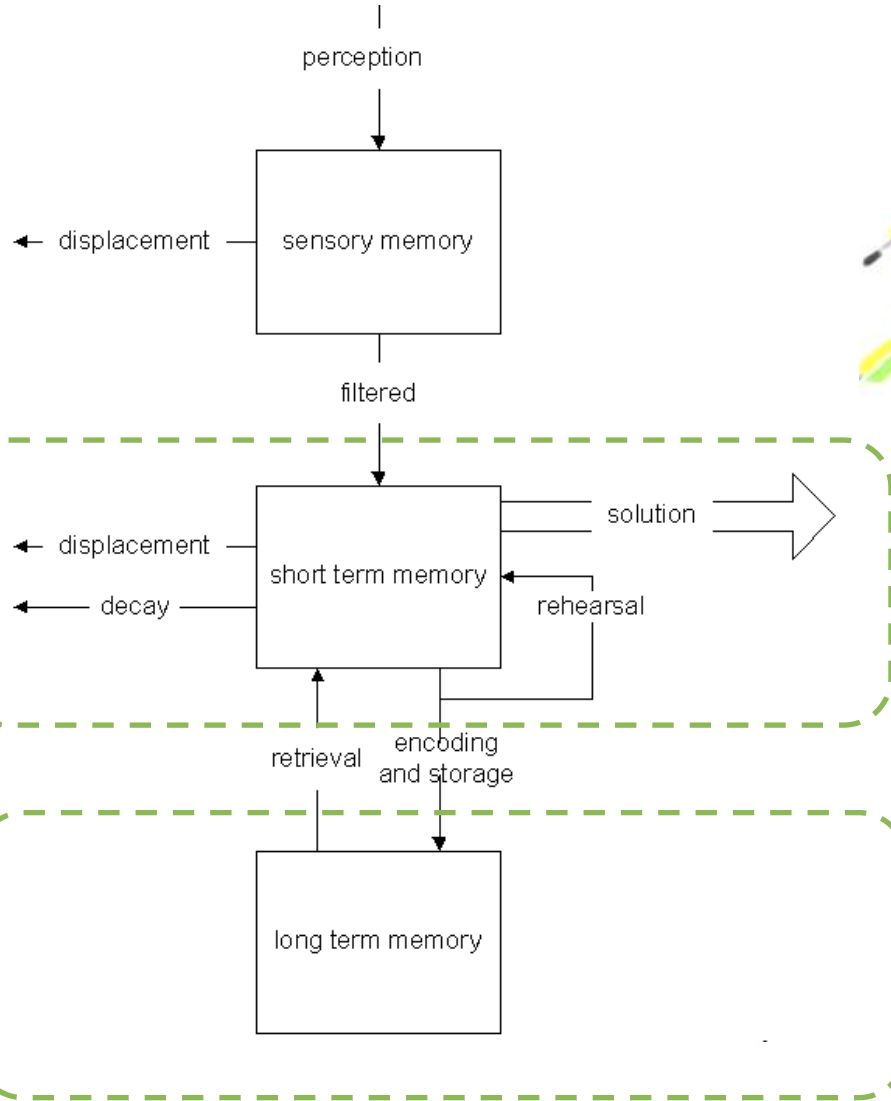
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Accuracy



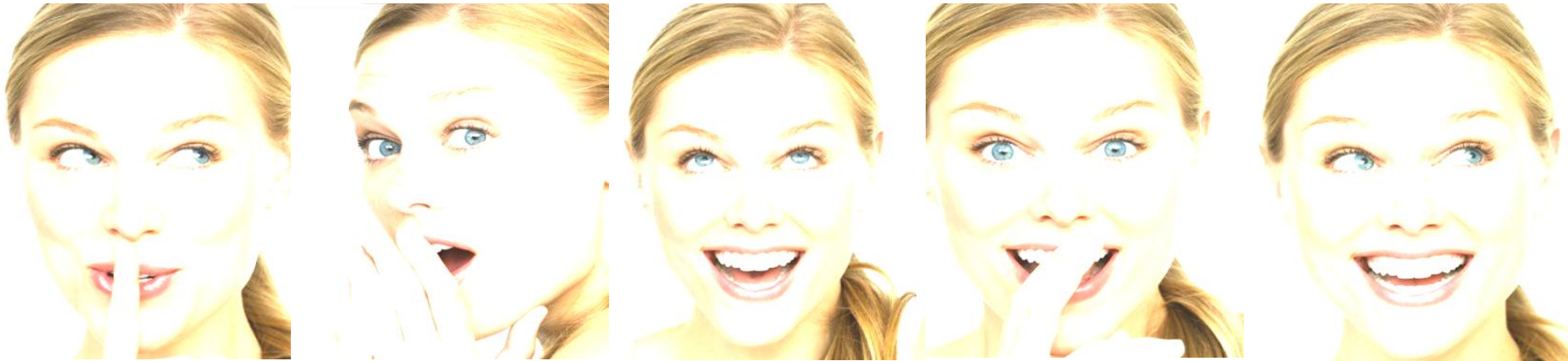
Real-Time methodology collects data here
All 'collectable' data passes through this point

Recall methodology collects data here
Only some data makes it to this point

Real-time data collection with real-time reporting

After "Psychology", 2nd Ed, C. Wade and C. Tavis.

It's impossible to recall emotion



" Because *emotions are transient* and rapidly changing, the acquisition of accurate data about them is *completely beyond the scope of retrospective methods*.

Not only does the TROI approach *get closer to the truth of real people's lives*, it empowers participants to express themselves freely by making them *responsible members of the research team*."

Dr Andy Wells, psychologist, LSE

The image features a dark, textured background with several white, three-dimensional puzzle pieces scattered across it. The pieces are interlocking and cast soft shadows, giving them a sense of depth. In the center of the image, the text "New insights from the database" is written in a bold, dark red font.

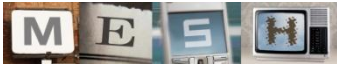
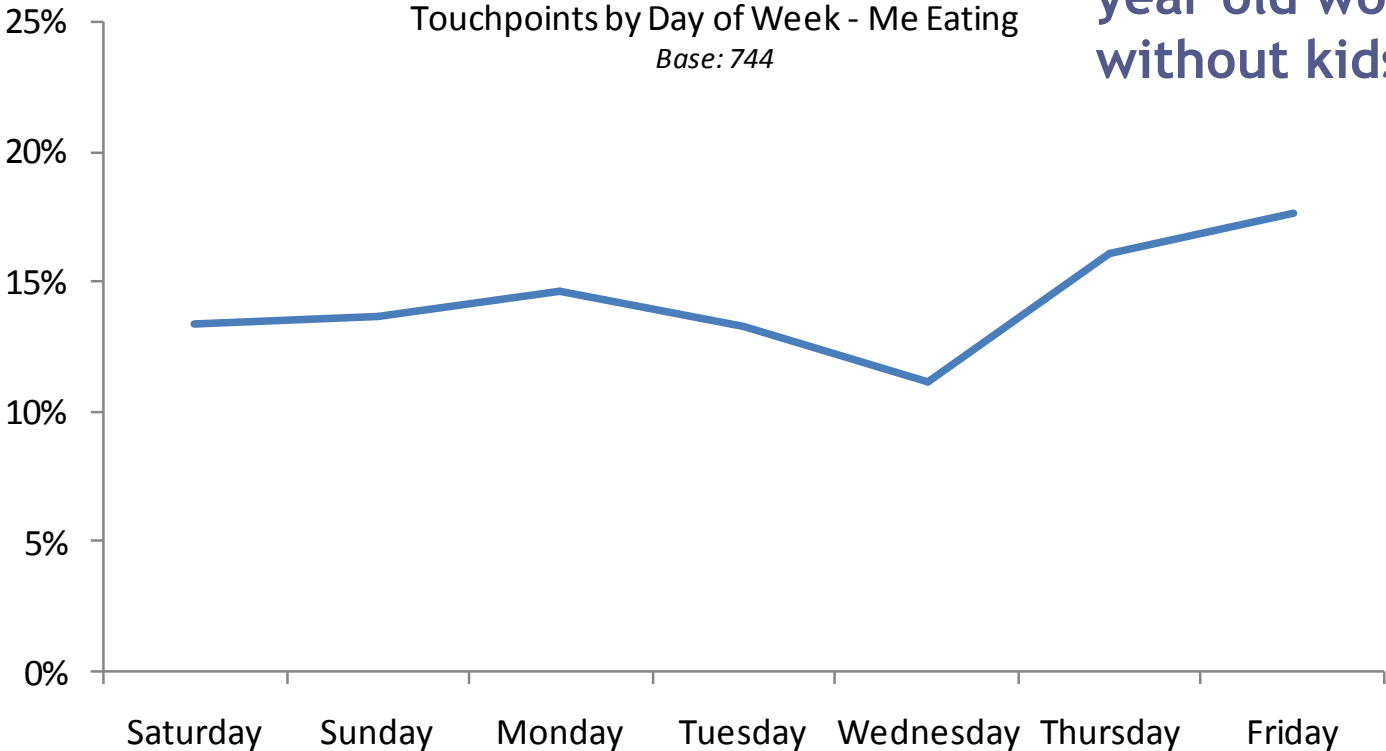
**New insights from the
database**

Which day gets the most chocolate consumption?



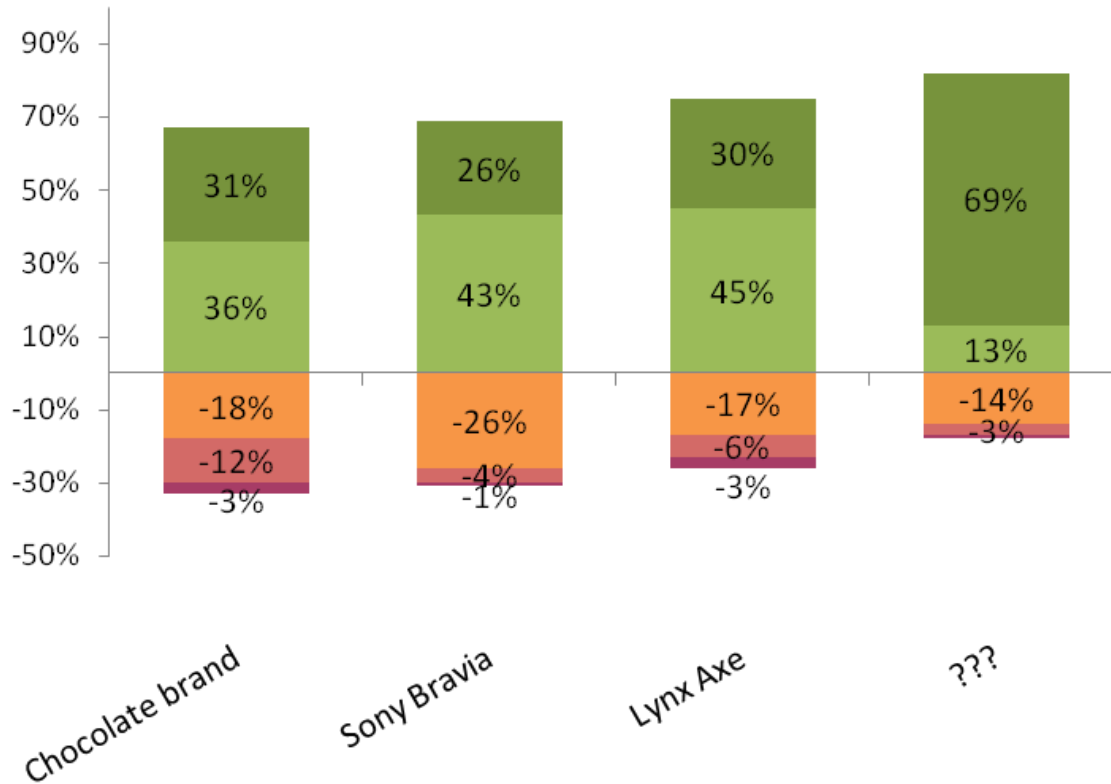
People get that 'Friday' feeling!

..particularly 21-29 year old women without kids



Which TV ad has received the most positive response?

Positivity for TV ad - 4 brands



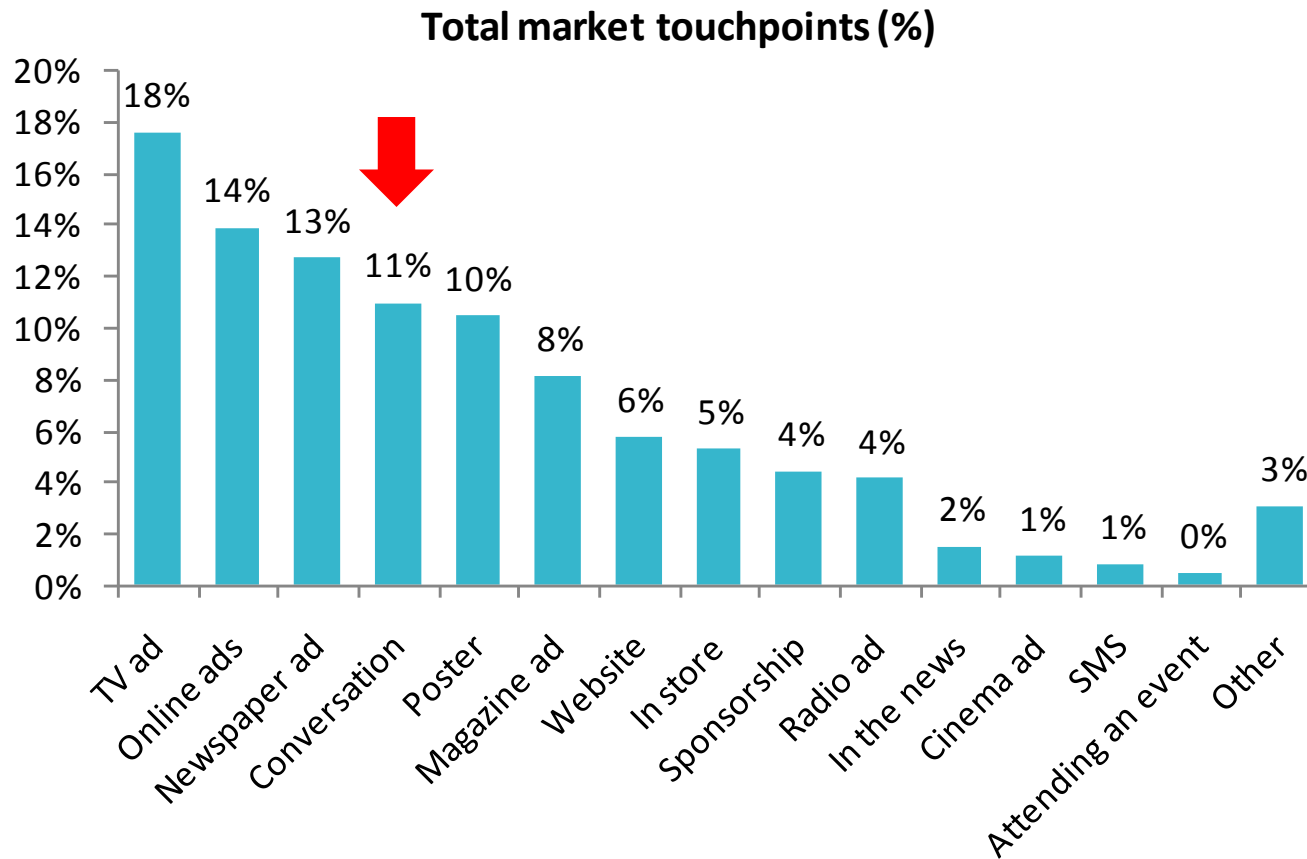
An alcohol brand on price promotion in supermarket ads



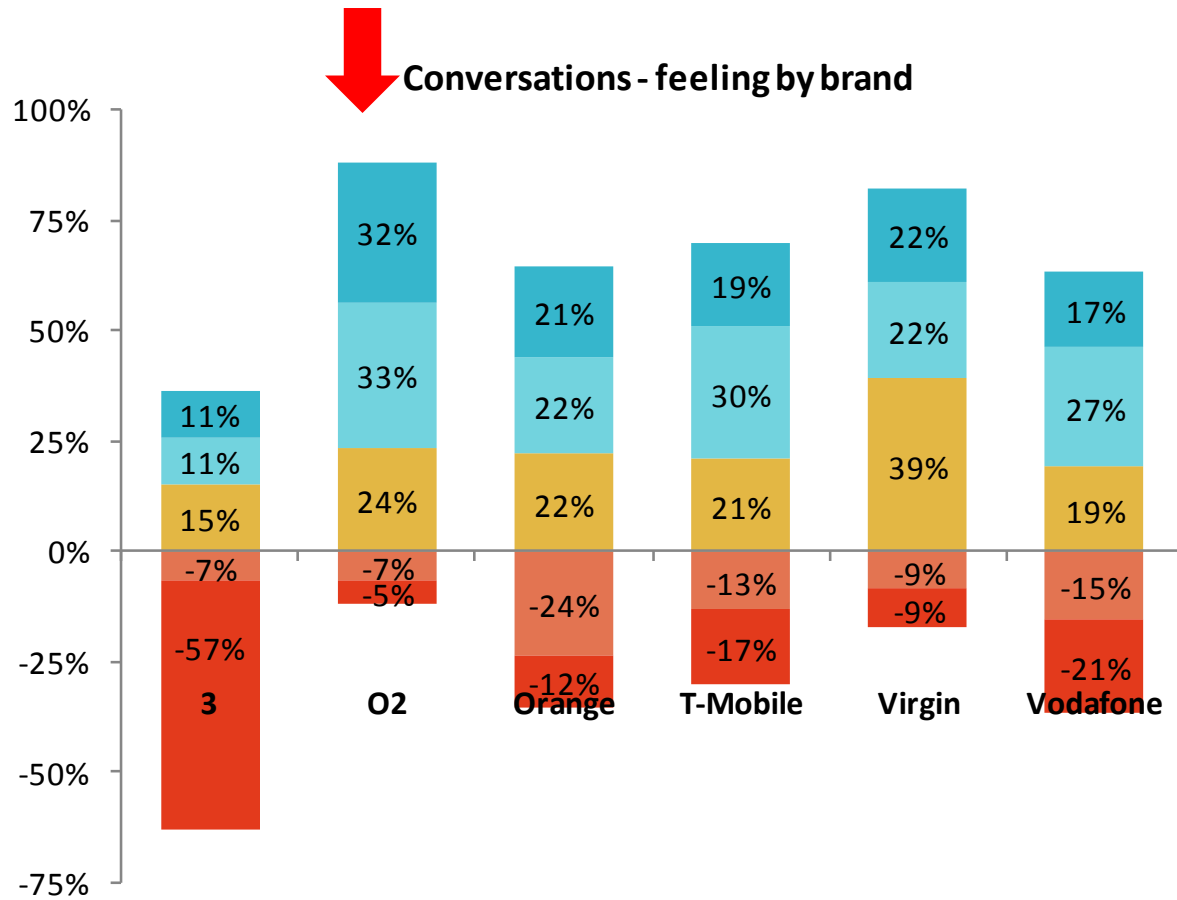
GEOFF ROBINSON PHOTOGRAPHY
ГЕОФ РОБИНСОН ФТОСЪВЪНН



Conversation is a really important touchpoint in mobile phone networks. Which brand has the best buzz?



O2!



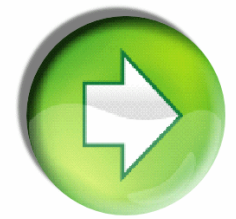
Introducing TROI...



You can have your cake and eat it!



The TROI approach



Legacy Brand Health

Participants complete a Legacy Brand Health questionnaire in advance of starting the real-time texting process. This contains the usual tracking measures plus other metrics.



Current Brand Experience

Participants text the brand and experiences they come across during their week in field. We agree the brand and experiences together.



Future Brand Direction

Participants are required to visit their SMS diary to complete a Future Brand Direction questionnaire before exiting the survey. This is a good place to look into specific ad recall and diagnostics in more detail.



All the questions you know and love



Screener: to filter on 16-45 cinema goers

Identify gamers

Spontaneous then Prompted Brand and Ad Awareness

Film Evaluation in Competitive Context on key metrics
Favourability
Consideration
Involvement
Momentum

Film Image and statement association measures

Briefing for Texting and Diary Element

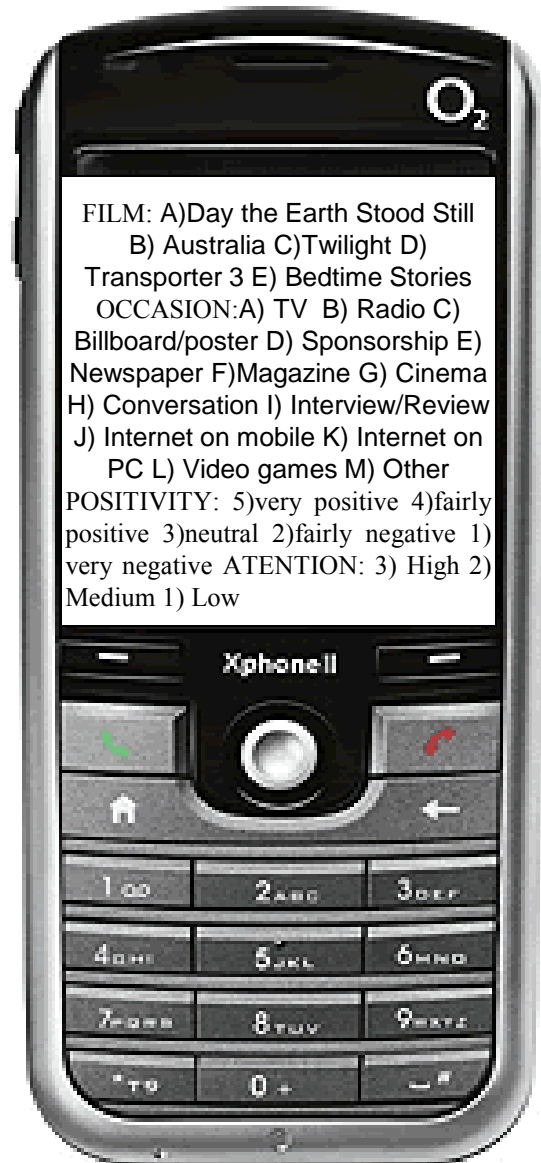
Texting framework

Text us whenever you see, hear or experience anything to do with the following films.

FILM:	OCCASION:	FEELING:	ATTENTION:
a) Day the Earth Stood Still	a) TV	5) Very positive	3) High Attention
b) Australia	b) Radio	4) Fairly positive	2) Medium Attention
c) Twilight	c) Billboard/Poster	3) Neutral	1) Low Attention
d) Transporter 3	d) Sponsorship	2) Fairly negative	
e) Bedtime Stories	e) Newspaper	1) Very Negative	
	f) Magazine		
	g) Cinema		
	h) Conversation		
	i) Interview/Review		
	j) Internet on mobile		
	k) Internet on PC		
	l) Video games		
	m) Other		



You tell us



Press



BBC NEWS 17:53 DE MENEZES, THE BRAZILIAN MAN WHO WAS MI

Capturing detail in MySMSDiary



Comments

OCCASION:
a) TV
b) Radio
c) Billboard/Poster
d) Sponsorship
e) Newspaper
f) Magazine
g) Cinema
h) Conversation
i) Interview/Review
j) Internet on mobile
k) Internet on PC
l) Video games
m) Other

TV

- Advertising
- In the news
- Entertainment programme
- Specialist programme about film
- Sponsorship
- Other

Poster/Billboards:

- In public transport/stations
- In street
- In cinema
- In-Store
- Other

Internet on PC:

- On an email site
- On an Instant Messaging site
- On a search engine
- On a social networking site
- On another website
- X-Box LIVE
- You Tube or video site
- Other

Cinema:

- Film trailer
- Posters
- In cinema displays
- Other

Conversation

- Talking to someone
- Someone talking to me
- Overheard a conversation



Looking to the future

This is where we measure any potential shifts in perceptions that have occurred during people's week of texting

Main message about the film

Film Evaluation in Competitive Context on key metrics
Favourability*
Consideration*
Involvement*
Momentum*

Film Image and statement association measures

Execution evaluation

Segmentation



MESH provides the new, multi-purpose, brand marketers research tool

New metrics that drive decision-making

Rich 'Experience Data' that provides the qualitative 'why' behind the quantitative 'what'

A growing database of 100,000 experiences to understand how people are connecting with different channels in different countries

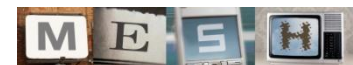


360 campaign evaluation from TV to In Store to WOM

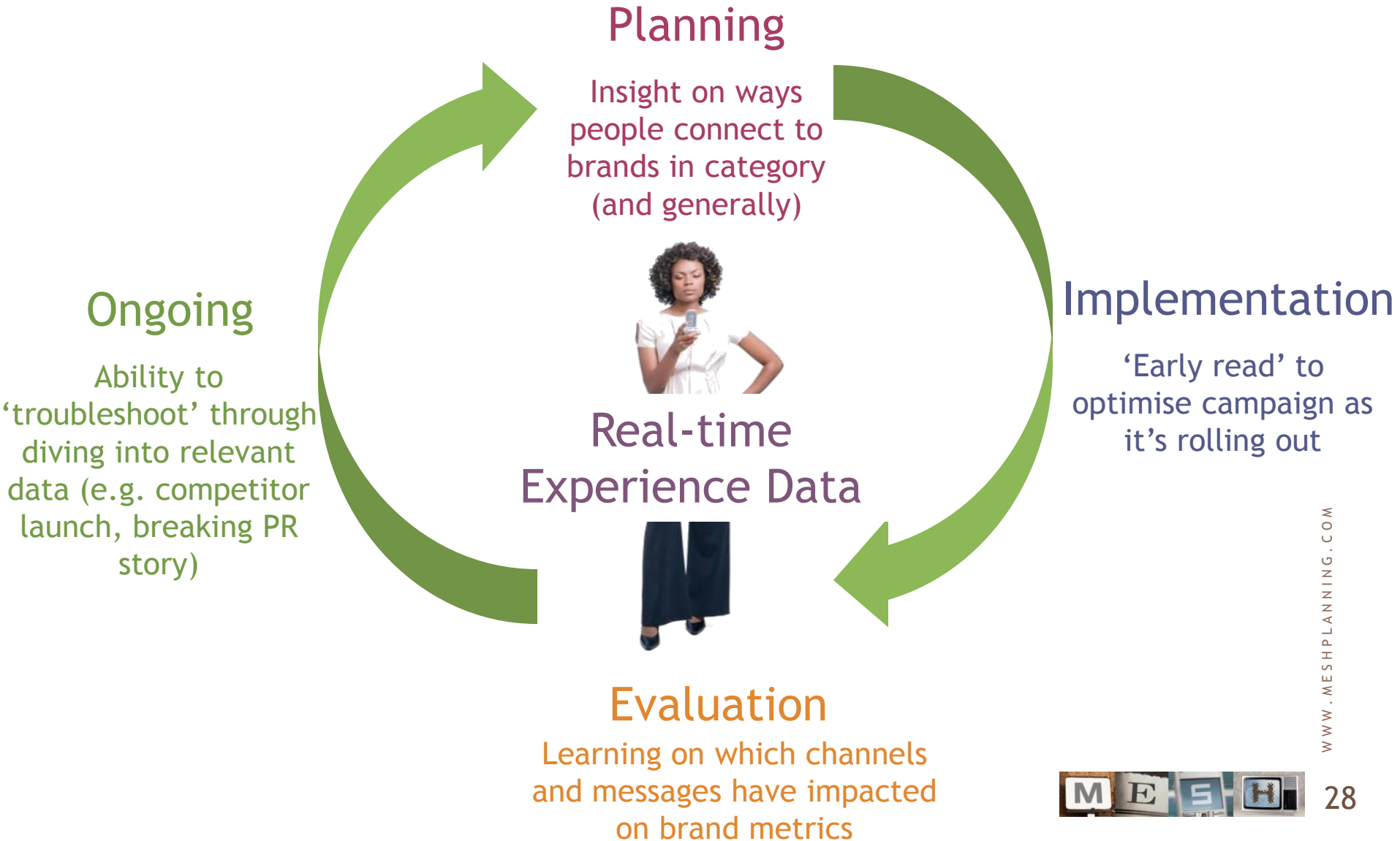
'Real-time' read on campaigns

Integrated Research Programmes that double the value and half the cost

Fast, relevant, actionable insight



Used throughout the Brand's cycle





Evaluating IMC for Fox

Client perspective - Microsoft

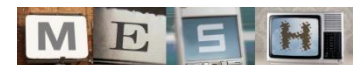
- Film marketers are increasingly significant investors in digital, both paid and non-paid for media
- Digital budgets becoming more significant = growing expectations of performance evaluation
 - Digital channel planning & flighting
 - Creative evaluation
 - In-campaign optimisation
 - Assessment of smaller reaching digital channels
- Insight required into *how* digital reaches its audiences
 - feelings and emotions it can elicit
 - interactions prompts
 - conversations it fuels

Client perspective - Fox

*“Unlike many brands, theatrical film releases have a **very short timeframe** in which to build brand affinity, with paid media campaigns mostly limited to just a couple of weeks. In addition, as soon as a film has released, consumers perceptions of the marketing campaign are often confused with their experience of the movie itself - or of its reviews and word of mouth.*

We needed a research methodology that would help us get closer to the real-time effects of different channels in building our film brands, and thus avoid the mis-attribution that is so common with conventional post-release Media Effect studies.”

Mark Gent - VP, International Media & Research



Background and Objectives

- Understand the relative impact of the different Touchpoints for the chosen films in both the United Kingdom and France (focus on UK here).
- Explain the role of online in the media mix in relation to the other Touchpoints and evaluate how it is working.
- Look in detail at how Australia and The Day The Earth Stood still were received when released during the run up to Christmas.

What data did we receive?

A variety of quantitative and qualitative experience data

4102 experiences

2619 comments related to each experience

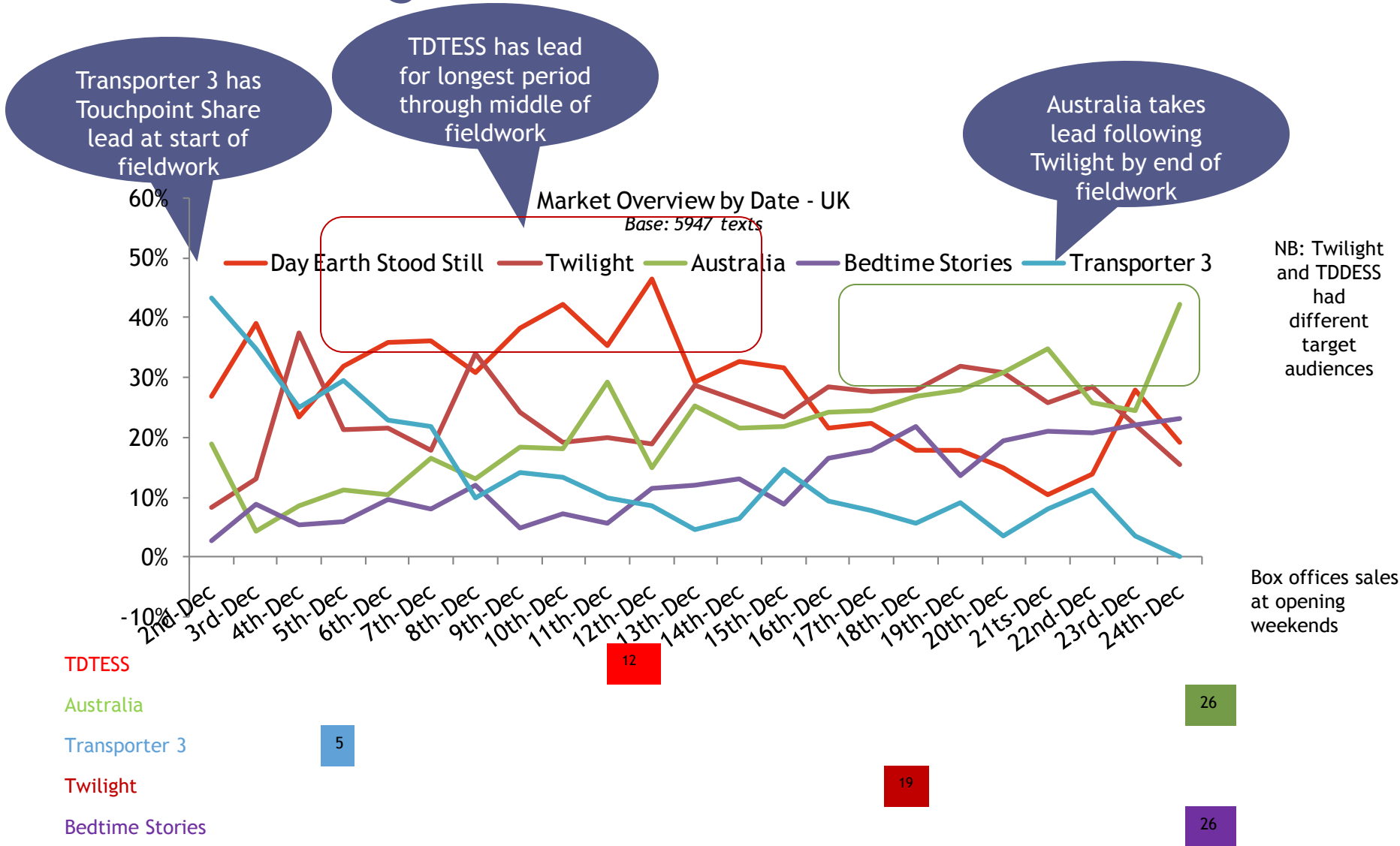
628 people participating

266 photos sent in

9 benchmark studies which account for 62,500 experiences in total



The timing of experiences reflects the launch dates of Target Films



A stack of newspapers is shown from a high-angle perspective. A single white sheet of paper is placed on top of the stack, partially covering the newspapers. The text "Key learnings" is written in a blue, sans-serif font on the white paper. The newspapers below have various colored covers and visible text on their pages.

Key learnings

Legacy, Current and Future Key Metrics

Note: Margin error of +/- 3%
Either side is 95% sig difference

Legacy Brand (Film) Health (pre)

KPI	TDESS	Australia	Twilight	Transporter 3	Bedtime Stories
Film awareness	75%	67%	48%	64%	22%
Film favourability (Top 2 Box)	24%	10%	19%	18%	27%
Film consideration (Definitely/Probably)	63%	39%	50%	36%	57%
Film momentum (Opening at Cinema, at Cinema eventually)	55%	42%	41%	41%	47%
Film first choice	46%	27%	26%	23%	22%

Current Brand (Film) Experience (texting)

KPI	TDESS	Australia	Twilight	Transporter 3	Bedtime Stories
Touchpoint Share	28%	23%	27%	8%	14%
Touchpoint Reach per Week	73%	68%	63%	31%	47%
Frequency per Week	2.5	2.2	2.8	1.8	1.9
Positivity (Top Box -Very)	21%	17%	21%	20%	24%
Attention (High)	43%	34%	40%	36%	41%

Future Brand (Film) Direction (post)

KPI	TDESS	Australia	Twilight	Transporter 3	Bedtime Stories
Film favourability shift in Top 2 Box)	+4%	+8%	+6%	-1%	+9%
Film consideration shift (Definitely/Probably)	+3%	+9%	+4%	-3%	+4%

Legacy Brand Health (pre)

KPI	TDTESS	Australia	Twilight	Transporter 3	Bedtime Stories
Film awareness	75%	67%	48%	64%	22%
Film favourability (Top 2 Box)	24%	10%	19%	18%	27%
Film consideration (Definitely/Probably)	63%	39%	50%	36%	57%
Film momentum (Opening at Cinema, at Cinema eventually)	55%	42%	41%	41%	47%
Film first choice	46%	27%	26%	23%	22%

What does this tell us?

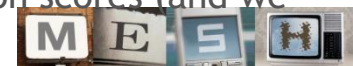
- On all traditional metrics, TDTESS comes in at Number 1
And Transporter 3 lags behind the other films (probably because it was an earlier release)
- Consideration to watch for Australia is 39% definitely/probably which is significantly below that of the other films (except Transporter 3)
However it appears to have a strong core of likely visitors, as 27% claim it's their first choice

Current Brand Experience (Dec'08)

KPI	TDESS	Australia	Twilight	Transporter 3	Bedtime Stories
Touchpoint Share	28%	23%	27%	8%	14%
Touchpoint Reach per Week	73%	68%	63%	31%	47%
Frequency per Week	2.5	2.2	2.8	1.8	1.9
Positivity (Top Box -Very)	21%	17%	21%	20%	24%
Attention (High)	43%	34%	40%	36%	41%

What does this tell us?

- TDESS, Australia and Twilight all had heavy presence during fieldwork generating high Touchpoint Share
- However, TDESS and Australia did a better job at reaching our participants. Those reached by Twilight had higher Frequency of Touchpoints. The Touchpoints were biased towards 16-24 age group and included a high Touchpoint Share for Posters, notably on buses and phone boxes which were not picked up for other Target Films
- Whilst Bedtime Stories only had 14% Touchpoint Share, it had the most positive Experience Profile and attention levels were strong
- In contrast, the experiences for Australia had lower Positivity and Attention scores (and we need to interrogate why this was)



Future Brand Direction

KPI	TDESS	Australia	Twilight	Transporter 3	Bedtime Stories
Film favourability shift in Top 2 Box)	+4%	+8%	+6%	-1%	+9%
Film consideration shift (Definitely/Probably)	+3%	+9%	+4%	-3%	+4%

What does this tell us?

Film Favourability shifts positively for both Australia and TDESS (and for Twilight and Bedtime Stories).

The opposite is true for Transporter 3 but this is probably due to the early release date.

Cost per Touchpoint

TDTSS	Touchpoints	Spend	Cost Per Touchpoint	Indexed
Newspaper 3)	93	Xxx	Xxx	39
Online 2)	116	Xxx	Xxx	51
Radio 4)	56	Xxx	Xxx	70
TV 1)	279	Xxx	Xxx	100
Poster	243	xxx	Xxx	136



“Extremely positive, and interesting. Read from Metro paper, and found this so good, I want to see it” (TDTSS, Newspaper, High Attention, Very Positive)

Australia	Touchpoints	Spend	Cost Per Touchpoint	Indexed
Online 2)	73	Xxx	Xxx	33
Radio 4)	55	Xxx	Xxx	33
TV 1)	247	Xxx	Xxx	100
Poster	135	Xxx	Xxx	137
Newspaper 3)	31	Xxx	Xxx	220



“Link to competition on C4 website to win Canon camera, site had trailer and had to find answer relating to film. It had the most information about the film, although not enough, showed a very good trailer” (Australia, Online, High Attention, Very Positive)

- 1) TV ad: Reference to TV ad only
- 2) Online= about 30% have been identified as related to seeing a banner/ad or trailer rest is Interview/Review or something else
- 3) Newspaper= about 33% have been identified as relating to an Ad specifically, rest is something else
- 4) Radio= about 10% have been identified as relating to hearing an ad specifically, rest is something else

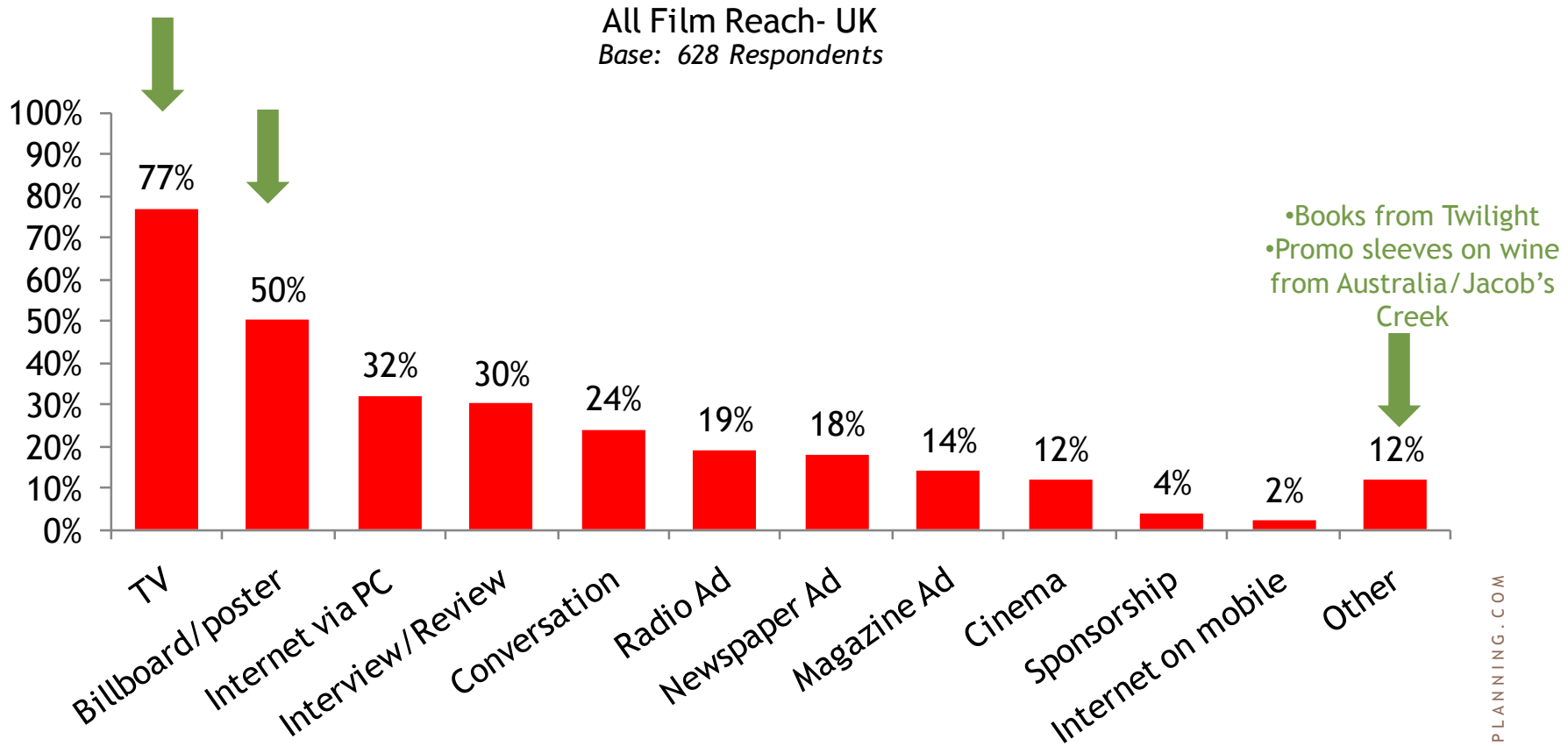
What we can learn about media efficiency

- Media spend for Australia was more efficient than for TDTESS
 - TV was around 15% more efficient
- For both films, Posters were over 30% less efficient than TV ads
- In contrast, even though only around 30% of Online touchpoints were identified as advertising, this channel looks to be more efficient than TV
- The newspaper activity worked very efficiently for TDTESS in comparison with the newspaper activity for Australia
 - This is due to the high impact Metro cover campaign activity for TDTESS
 - However, media efficiency should be looked at in the context of creative as well. TDTESS had a 'headline news story' type creative which worked particularly well in a newspaper setting

A stack of newspapers is shown from a high-angle perspective. A single white sheet of paper is placed on top of the stack. The word "Overview" is written in a blue, sans-serif font on the white paper. The newspapers below have various colored covers and visible text on their pages.

Overview

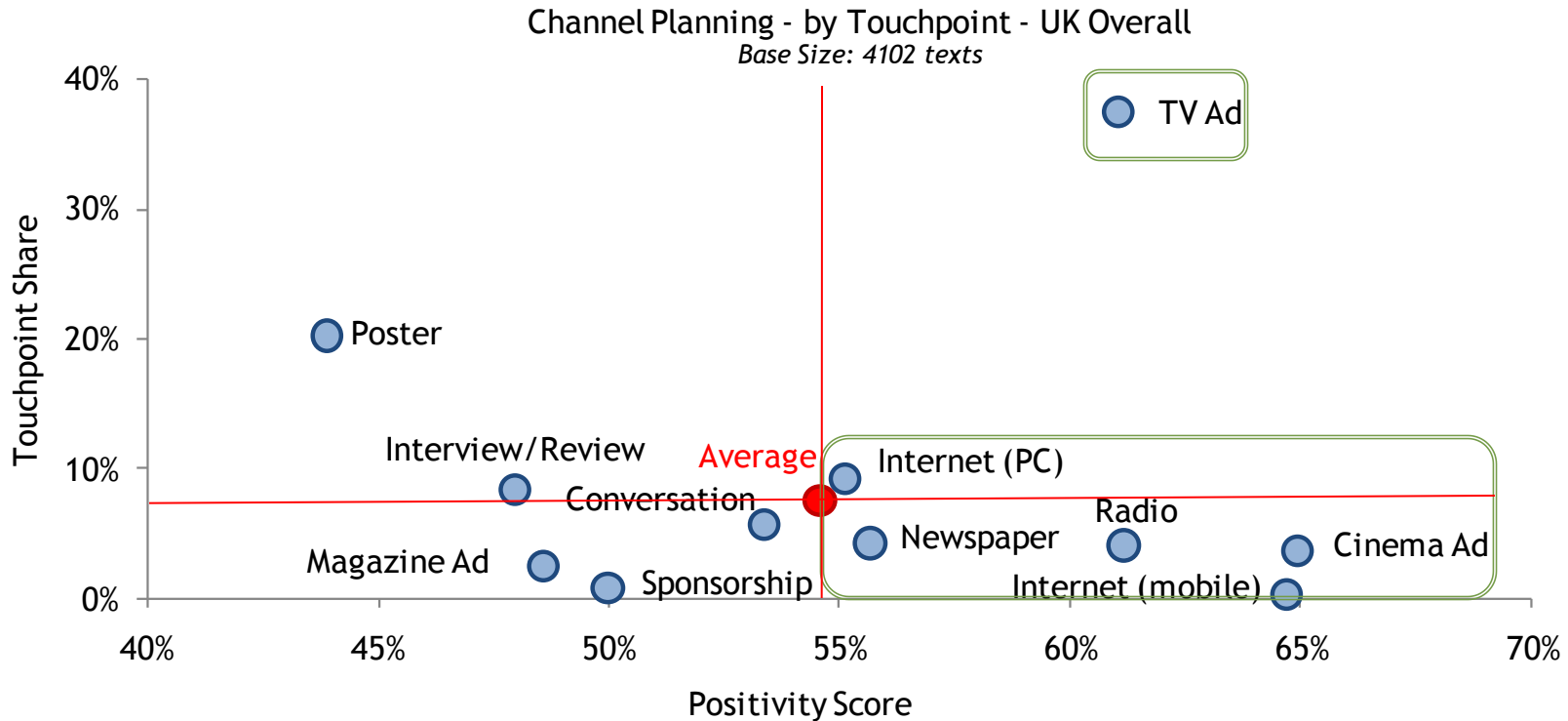
Although TV reached $\frac{3}{4}$ of participants, Posters had a good Reach per Week of 50%



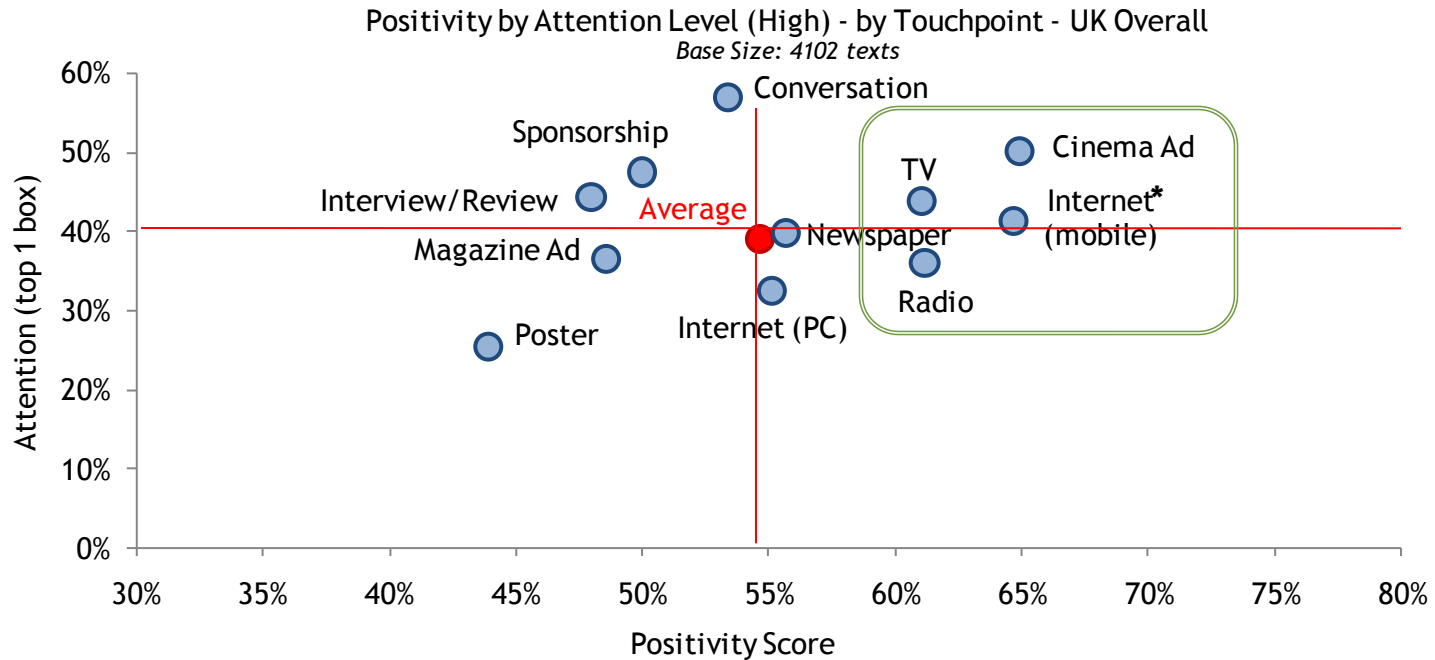
NB: TROI more accurately picks up Poster activity than traditional recall



Whilst TV dominates in terms of Touchpoint Share and Positivity, Cinema, Radio, Internet and Newspaper all represent opportunity areas



Highest Attention is paid for Cinema and TV when people are engaged with the medium and mainly watching trailer



Attention Levels are driven by the channel and are less related to the films within the channels

* NOTE: SMALL BASE SIZE INTERNET ON MOBILE

Source= Current Brand Experience (Text data)

Overall Learnings

- TV dominates in terms of Reach per Week and also Touchpoint Share
- However, over half of participants were Reached during their week of texting by Posters too
- Internet, Newspapers and Radio are all channels with higher Positivity, in the next section we will find out which films are driving this
- High Attention levels are related to the channel and not necessarily to the film within the channel
- Cinema, unsurprisingly, has a very positive and high Attention profile

TV



Compared with benchmark studies, TV not only has high Touchpoint Share for films but the experience this channel delivers is very positive

TV Benchmarks (% of all texts sent)*

Films	37%
Charities	23%
TV Manufacturer	22%
Cool Brands UK	21%
Confectionery	21%
Direct Enquiries	21%
Mobile network - PAYM	14%
Soft Drinks	14%
Mobile Network – PAYG	14%

TV Benchmarks (% top 2 box positivity)

TV Manufacturer	66%
Films	61%
Confectionery	63%
Mobile network - PAYM	59%
Cool Brands UK	58%
Soft Drinks	58%
Mobile Network – PAYG	53%
Direct Enquiries	47%
Charities	42%

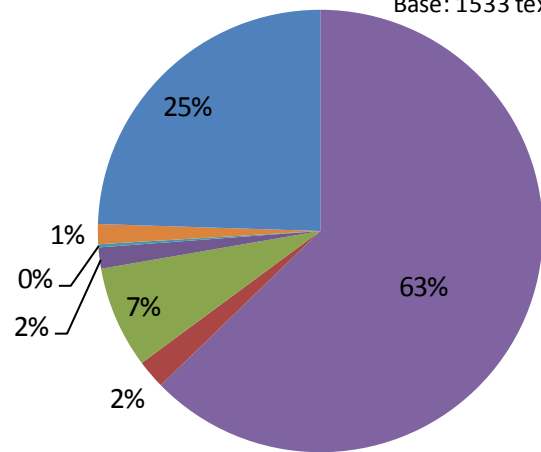


Benchmarks studies are related to individual studies and contain about 2800 Touchpoints each survey

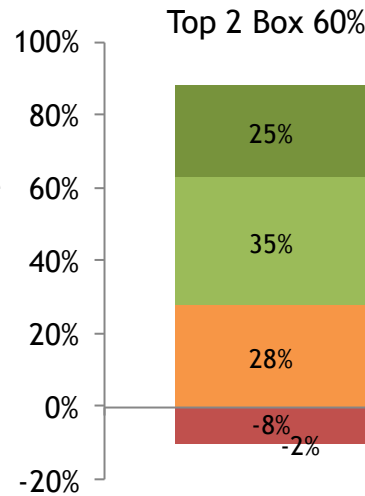
TV ads (representing 2/3rds of all TV experiences) show a similarly positive profile to trailers in cinema

More Info: TV - UK
Base: 1533 texts

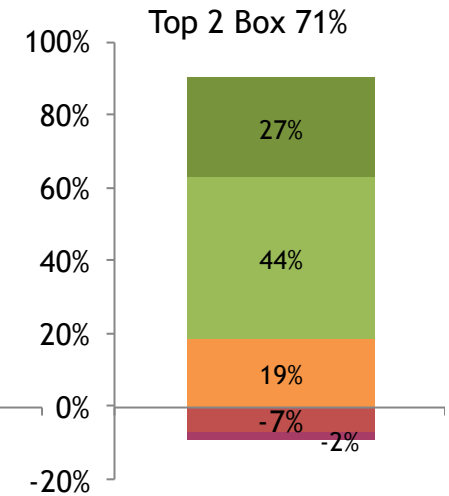
- Advertising
- In the news
- Entertainment programme
- Specialist programme about film
- Sponsorship
- Other



Ads/Trailers Seen on TV
Base Size: 1391 Texts



Trailers Seen at Cinema
Base Size: 84 Texts



And seeing the trailer/Ad makes people want to watch the film

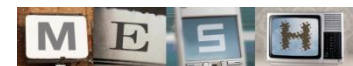
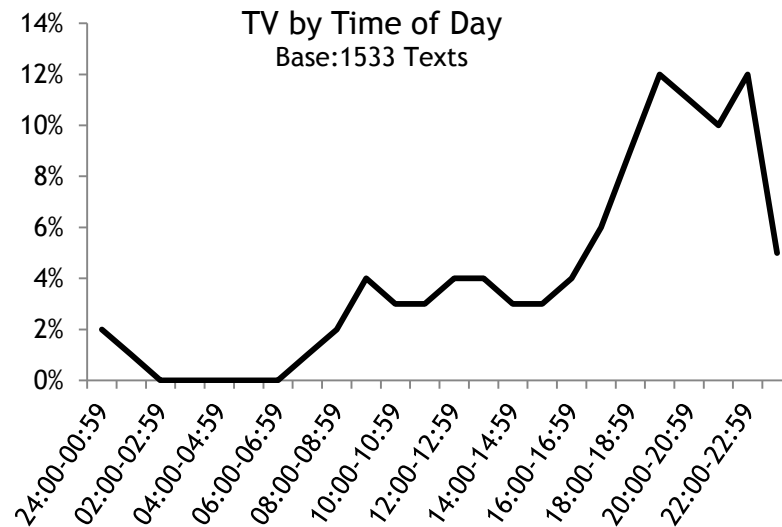
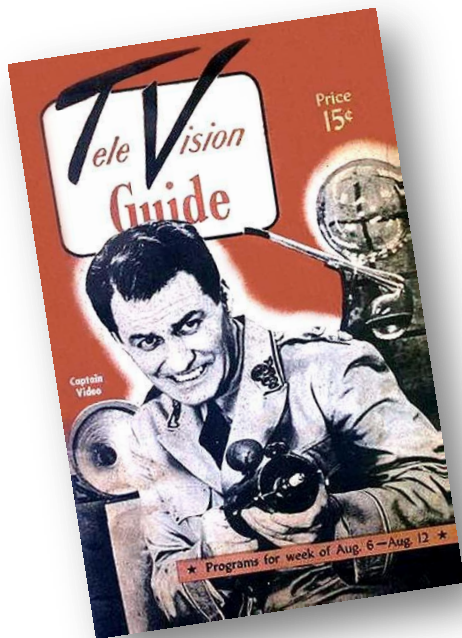
“Again it was the viewing of the trailer on TV. Made me want to go watch it sooner than anticipated - I went the next day to cinema. Felt I could connect with the story.”
(Twilight, TV, Medium Attention, Very Positive)

- Very Positive
- Fairly Positive
- Neutral
- Fairly Negative
- Very Negative



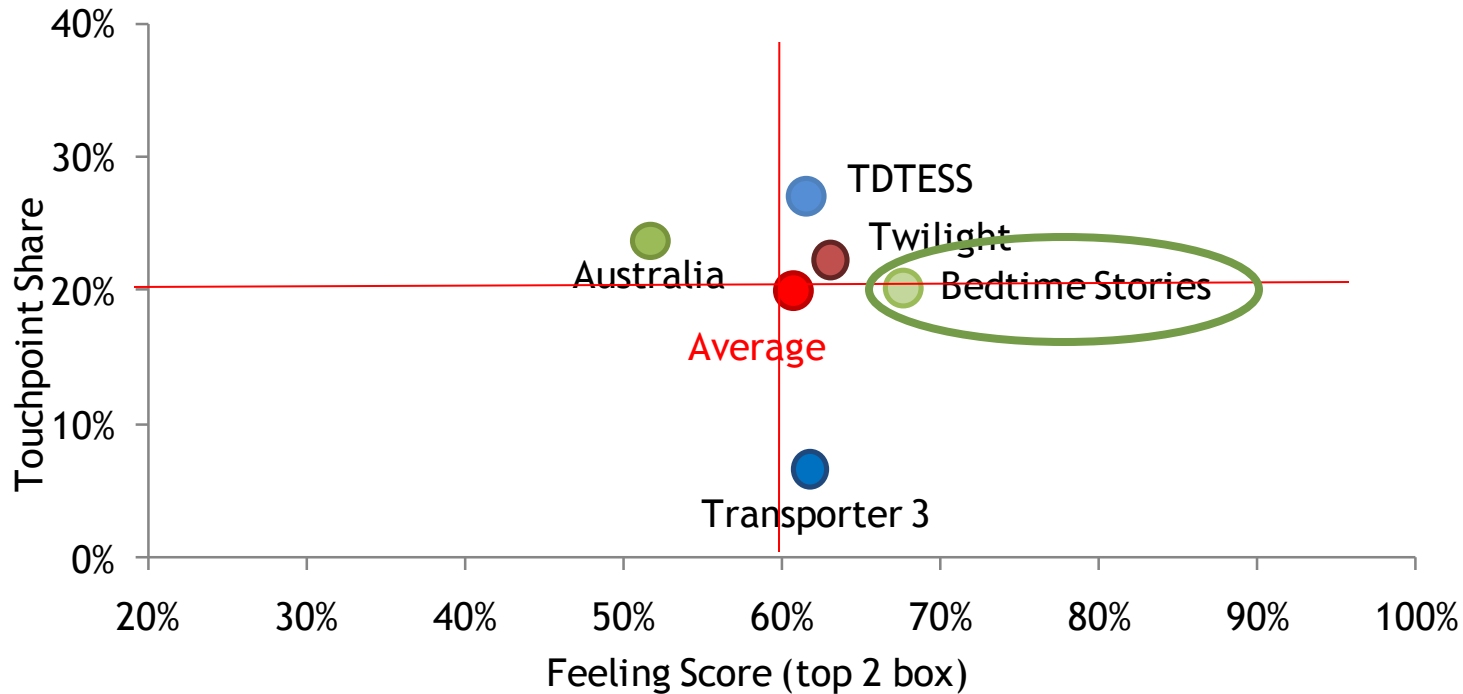
TV is a particularly important channel for women and is seen in the evening (7-10pm)

	SAMPLE MALE		SAMPLE FEMALE	
	16-24	25-45	16-24	25-45
TV Reach per Week	70%	70%	78%	82%
TV Frequency pw	3.05	3.2	3.3	3
TV Touchpoint Share	28%	33%	40%	41%



Bedtime Stories TV ads/Trailers receive the most positive response but Australia is doing the least well on TV

Best in Class - UK Overall - TV Ad
Base Size: 1032 texts



For Australia people weren't sure what the film was about after seeing the TV ad

'Was watching TV with family - nothing inspiring about the advert - looked a bit dull but might be ok as a **romantic film** once you get into it - looked a bit too much like "far and away" (Australia, TV Ad, Medium Attention, Fairly Negative)

"Looks like a **period drama**" (Australia, TV, Medium Attention, Fairly Negative)

"I do not like **war films** and the trailer made it feel like it would be especially boring" (Australia, TV, Medium Attention, Fairly Negative)



Bedtime Stories TV ads are Positive because

1) Disney film evokes positive emotions

“I love Disney so hearing this advert made me give it my full attention” (Bedtime Stories, TV Ad, High Attention, Very Positive)

2) Adam Sandler is liked (all positive comments) and drives people to the cinema

“I love the look of this film, I like Adam Sandler in the street when it starts raining gum balls” (Bedtime Stories, TV, Very Positive)



3) It seems like good fun to watch, especially with kids and family

“Exciting fun and good for kids” (Bedtime Stories, TV, High Attention, Very Positive)

Touchpoint share	Total	SAMPLE MALE		SAMPLE FEMALE	
	UK	16-24	25-45	16-24	25-45
Bedtime Stories	14%	9%	8%	17%*	14%*

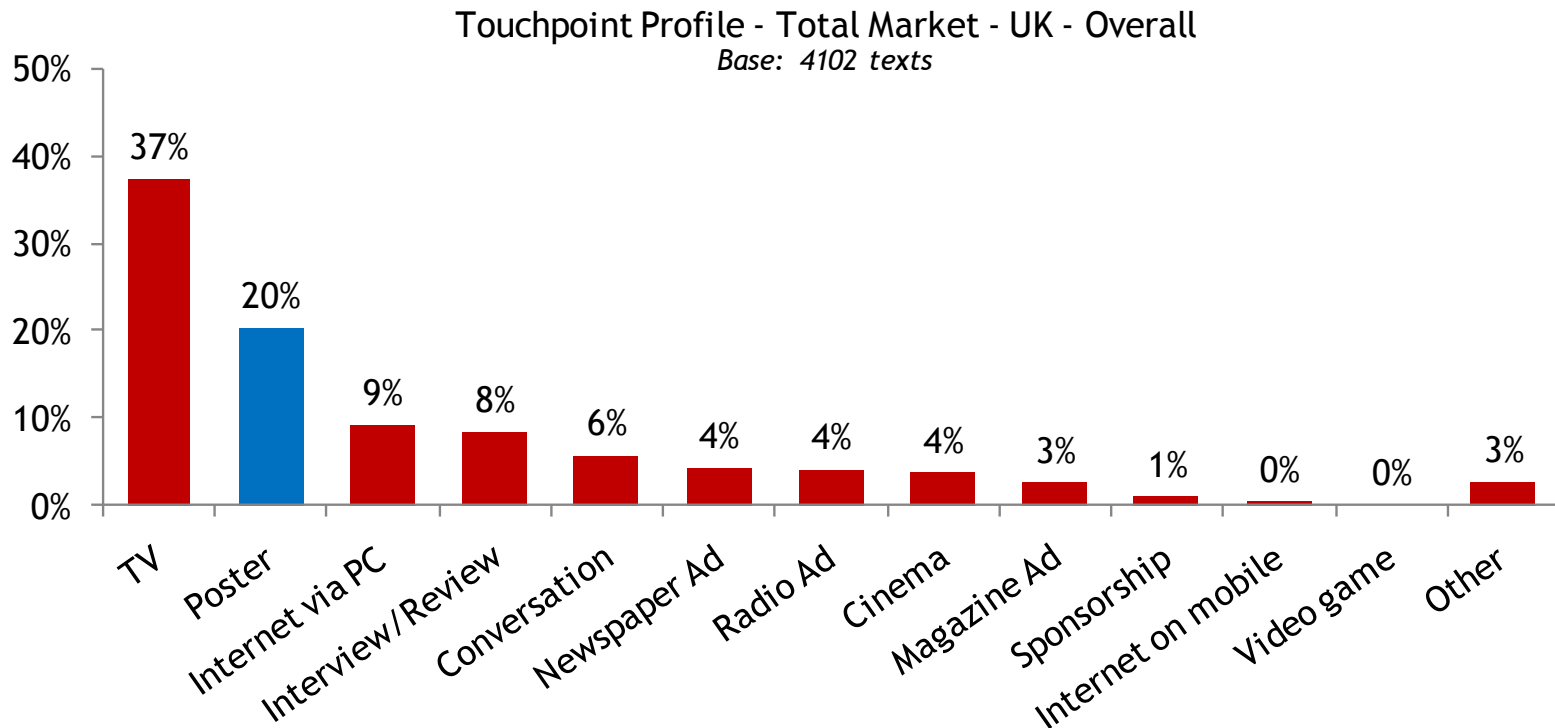
Recommendations for TV

- TV ads give people an experience close to the cinema trailer experience in Positivity so continue to invest heavily in this channel
 - Particularly if the films are targeted at women or families
- Look at how TV can drive online
 - To get a longer trailer experience
 - To find out more about the film
- Australia and Bedtime Stories were clearly working in different ways - Australia to intrigue, Bedtime Stories to evoke the magic of Disney
 - On the surface, the Bedtime Stories strategy appears to be working more strongly. Recommend interrogating the role of intrigue to ensure that it piques interest rather than confuses

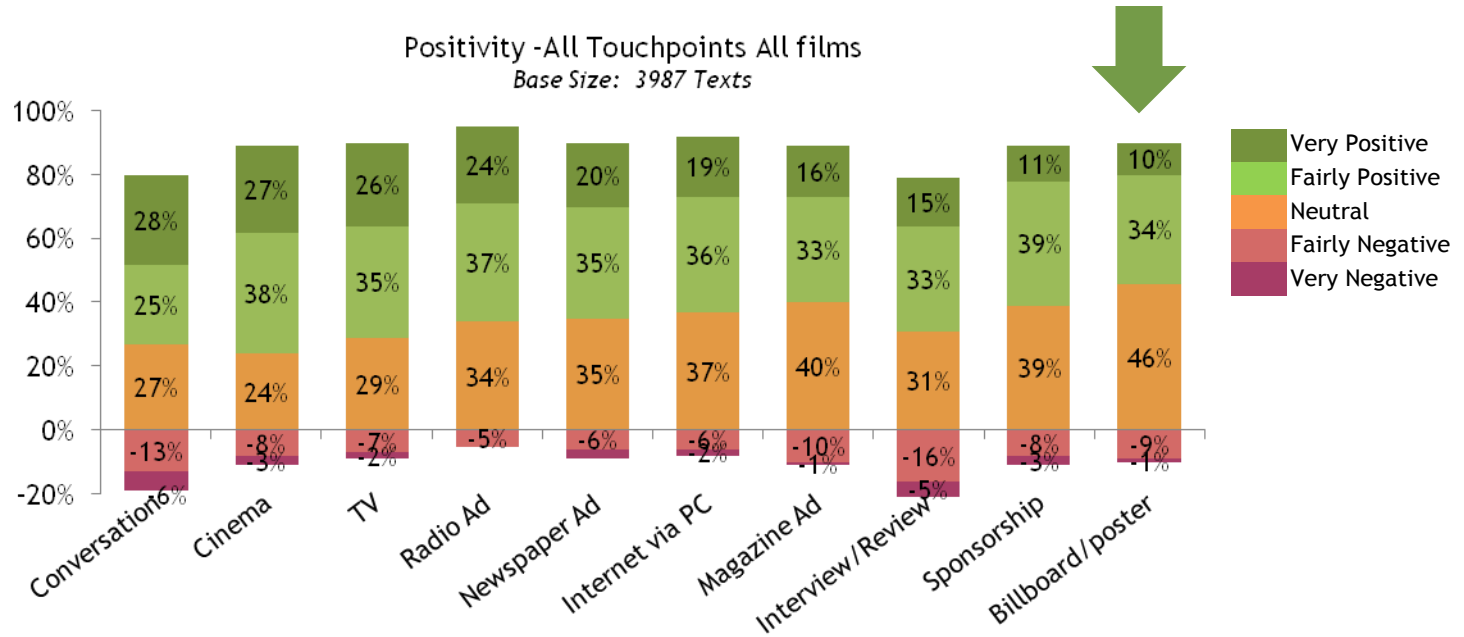
A large, empty white poster board is mounted on a complex metal frame structure. The frame consists of numerous interconnected metal beams and supports, creating a grid-like pattern. The poster board is a large, rectangular sheet of white material, possibly paper or fabric, that is slightly wrinkled and has some faint, illegible markings on it. The background is a clear, bright blue sky. The overall scene suggests a construction or exhibition site where a large display is being prepared.

Posters

Although posters received the 2nd largest amount of texts...

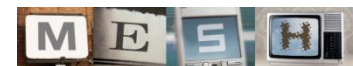


...the number of neutral touchpoints along with the comments suggest that *the strategy on posters could be optimised*

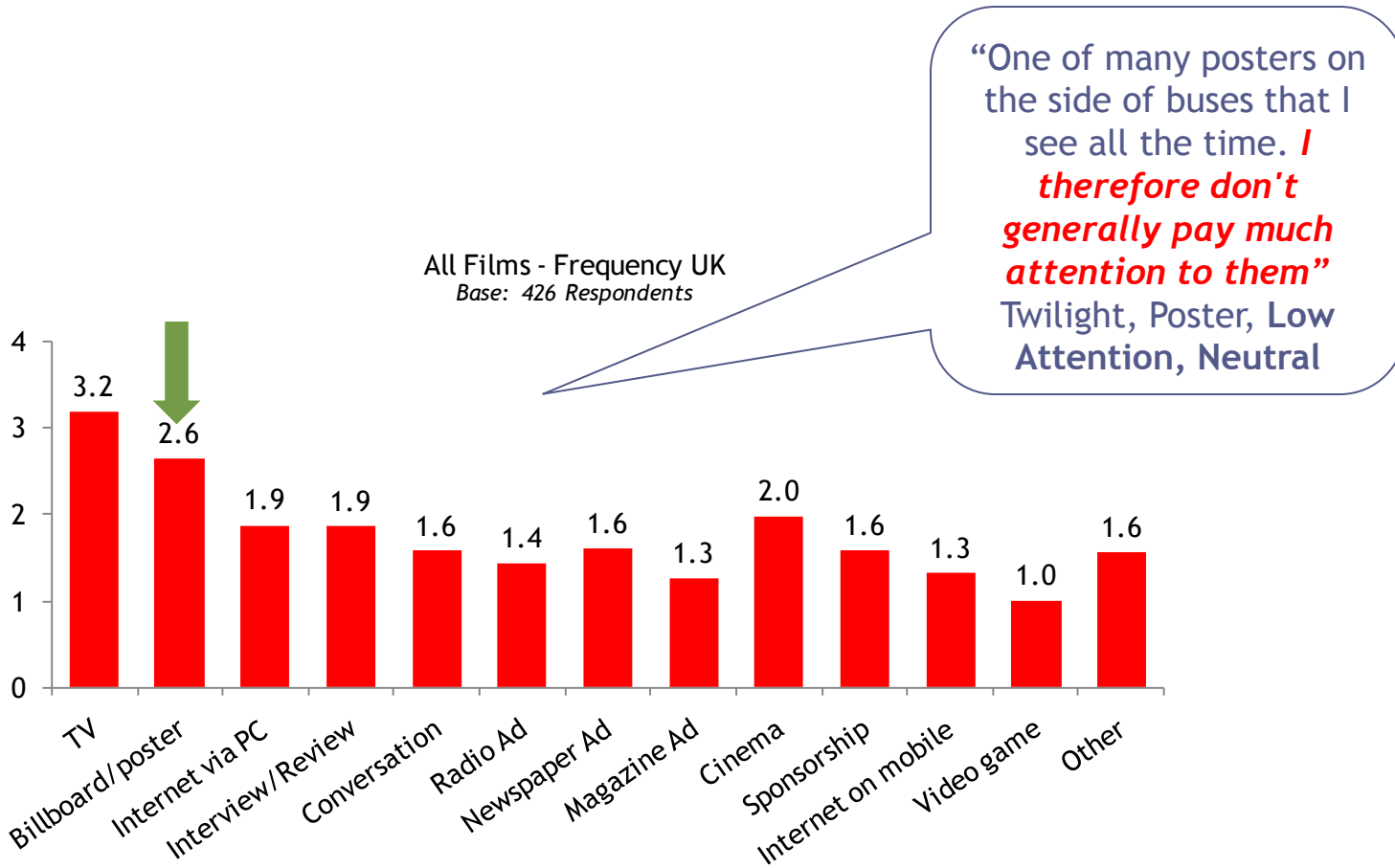


Poster Benchmarks (% top 2 box positivity)

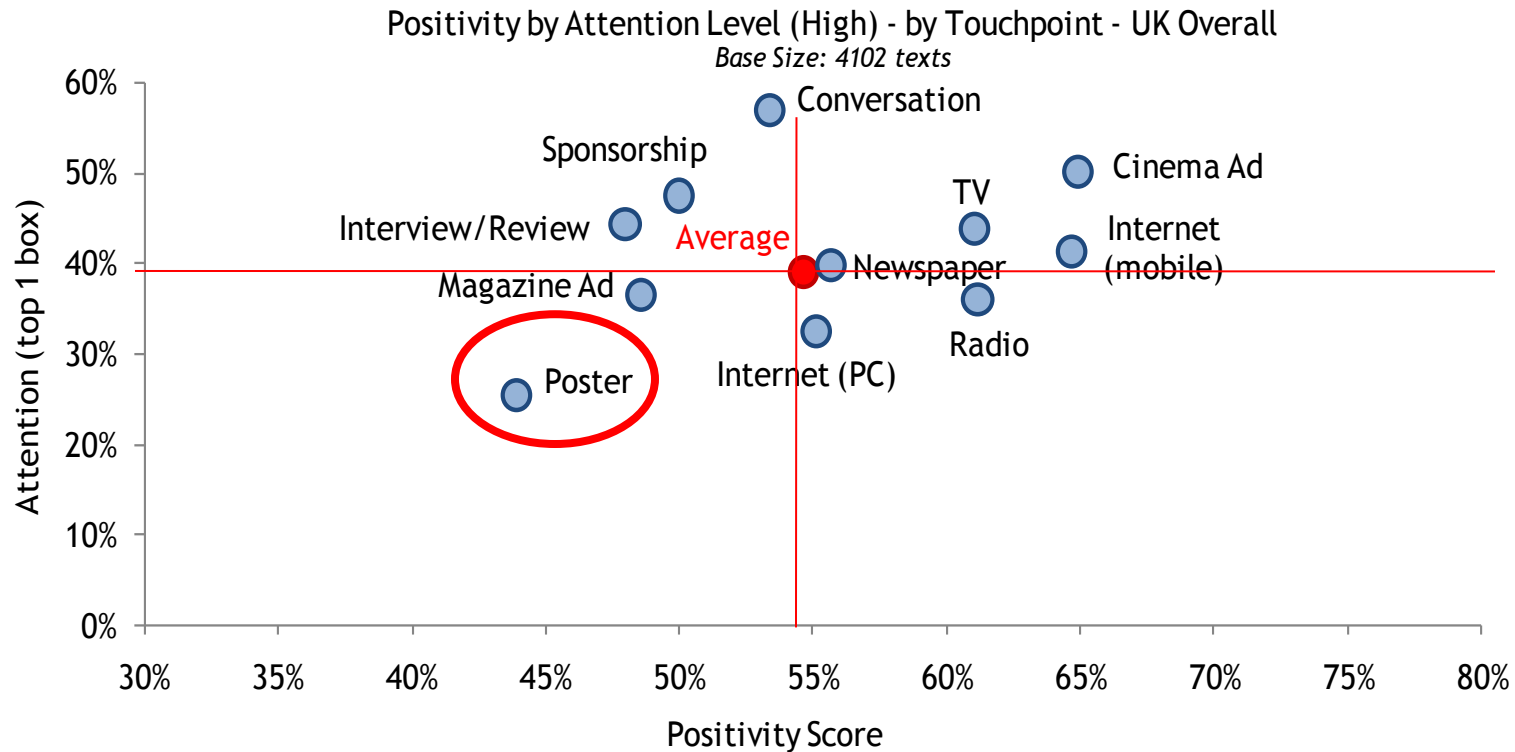
TV Manufacturer	70%
Confectionary	60%
Cool Brands UK	55%
Mobile Network – PAYG	52%
Charities	50%
Mobile network - PAYM	47%
Soft Drinks	45%
Films	44%
Direct Enquiries	37%



High Frequency per week creates apathy towards Posters (unlike TV where the footage is engaging and bears repetition)

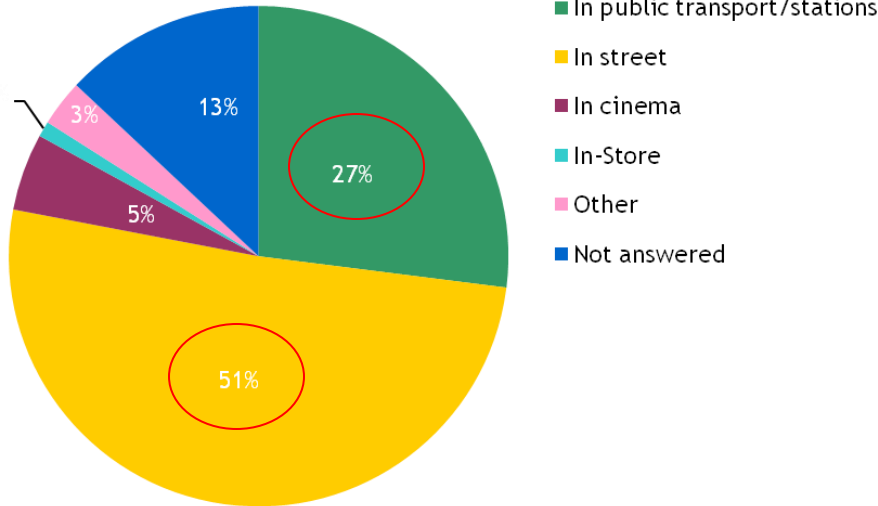


Posters provoke the least high Attention levels. This is similar across all Films



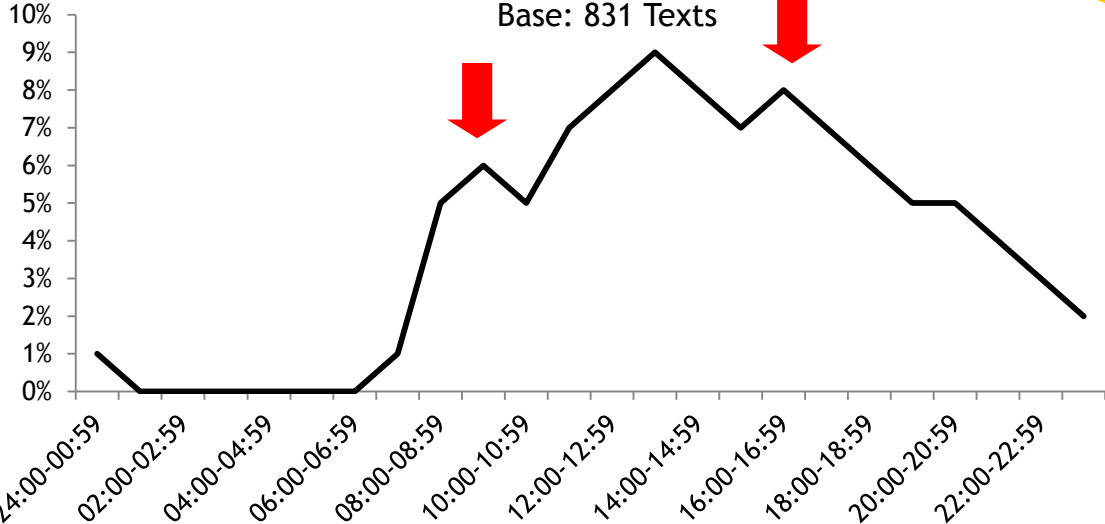
Over 3/4 of Posters are noticed in the street or in public transport, often during commuter times

More Info Billboard/Poster- UK
Base: 831 texts



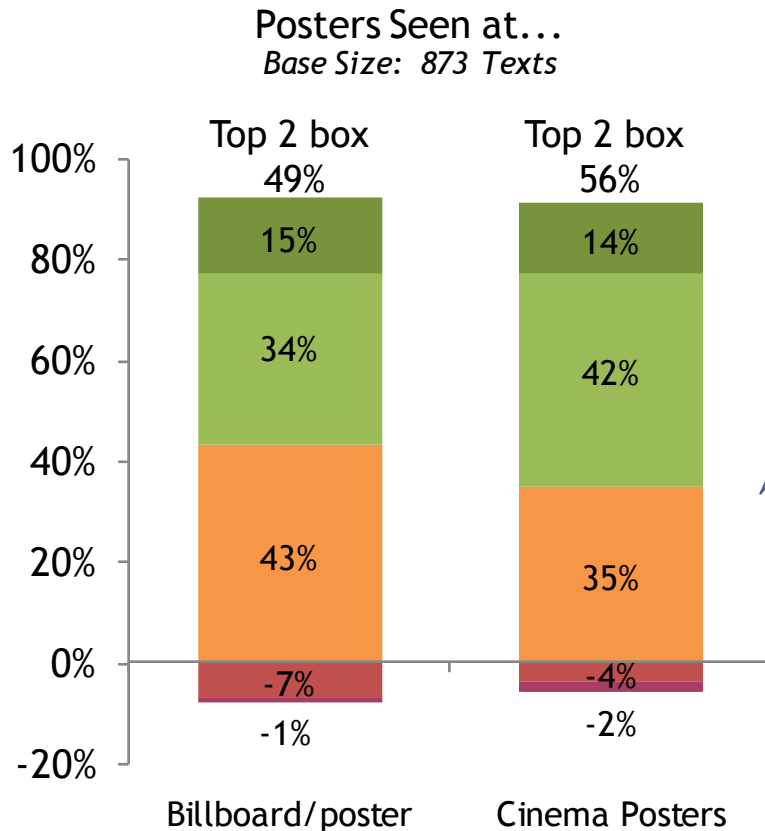
Billboard/Poster by time of day

Base: 831 Texts



Source= Current Brand Experience (Text data)

But when Posters are noticed in Cinema, they are liked slightly better!



“Whilst with a group of friends in Cineworld in Feltham, I noticed a poster for this film. The poster did grab my attention as we were debating about whether or not to watch Twilight” (Twilight, Cinema Poster, High Attention, Fairly Positive)

What's required from a Poster is different when in transit versus waiting

Quick impact needed in transit

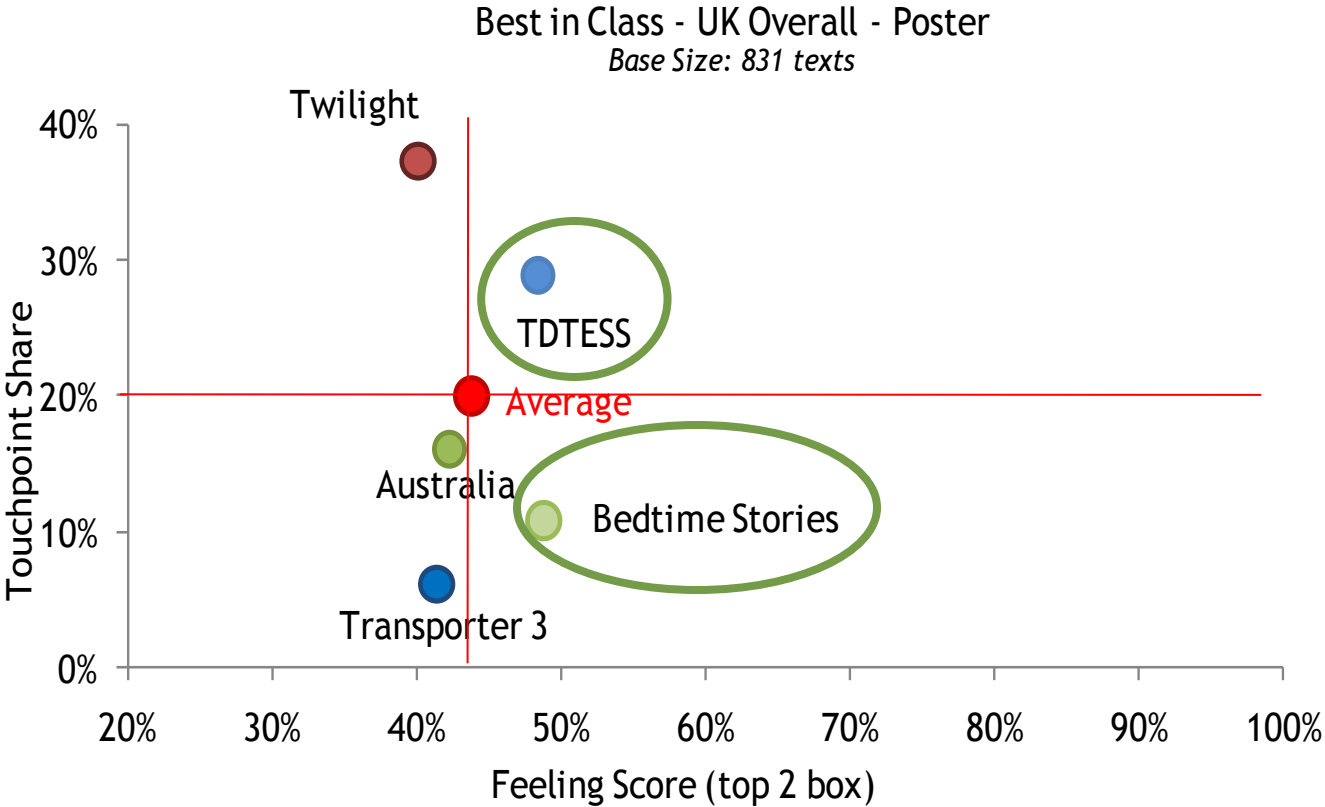


“First time I saw advert did not get a lot of information about the film, saw it on side of bus in Edinburgh”
(Twilight, Poster, Medium Attention, Neutral)



However, when people are waiting for a train or bus they have the time to take in more detail

TDTESS & Bedtime Stories lead in Positivity but Twilight has the highest Touchpoint Share for Posters



Source= Current Brand Experience (Text data). NB: Base is Poster texts

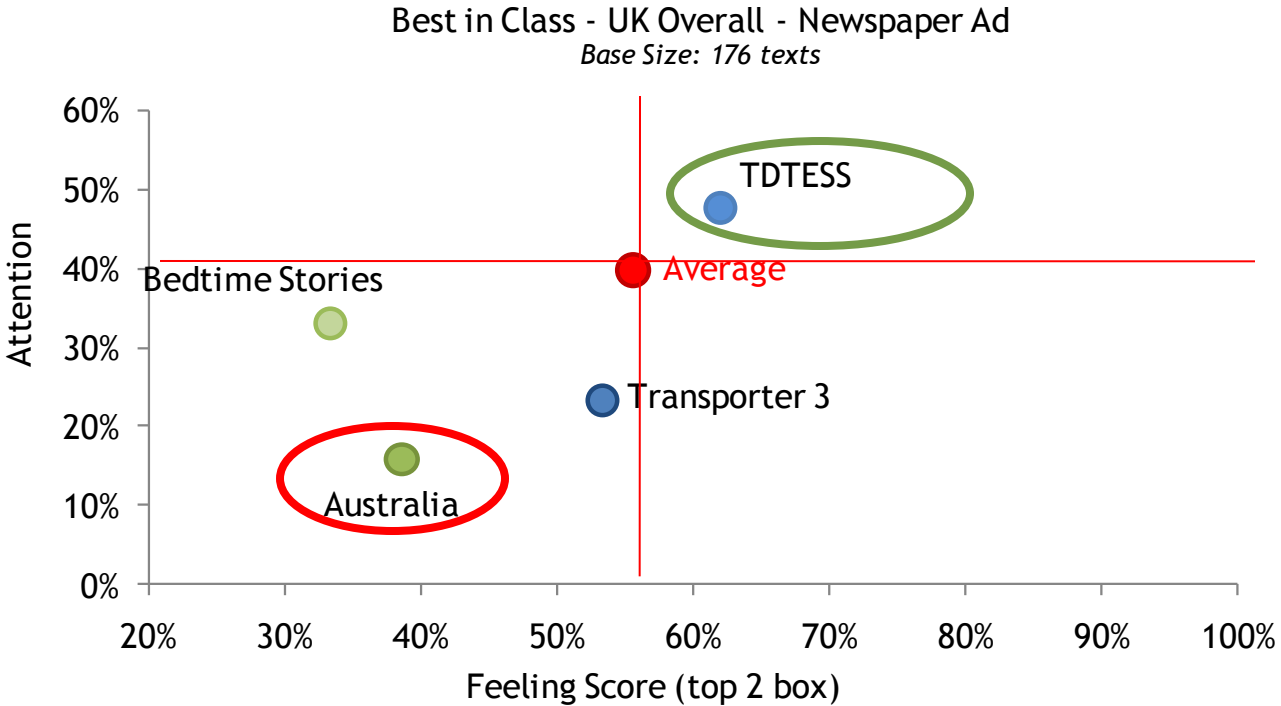
Recommendations for Posters

- To reduce wearout of Posters
 - Run a number of executions (within the creative restrictions specific to print/still media for films)
 - Where possible tailor to
 - Short visibility time (e.g. roadside billboards, bus sides, billboards visible from moving train) needing high impact
 - Areas with longer dwell time (e.g. bus stops, train and tube stations, tube cards) where more information can be given
 - Consider testing
 - Digital posters to increase engagement
 - More interactive devices such as invitation to download trailers via text in via mobile phone
- Continue driving people online to find out more about the film, reference to the making of it, watching the trailer, etc

Newspapers



TDTSS is the best in class



Source= Current Brand Experience (Text data). NB: Base is Newspaper texts

TDTSS is noticed more frequently and is also in interesting Newspaper formats

The Metro is the Newspaper mentioned most (45 out of 112 touchpoints) with TDTSS coverage having 29 mentions.

“A full cover on the Metro newspaper; the front page and rear spread.”
(TDTSS, Newspaper, Ad High Attention Very Positive)

Recommendations for Newspapers

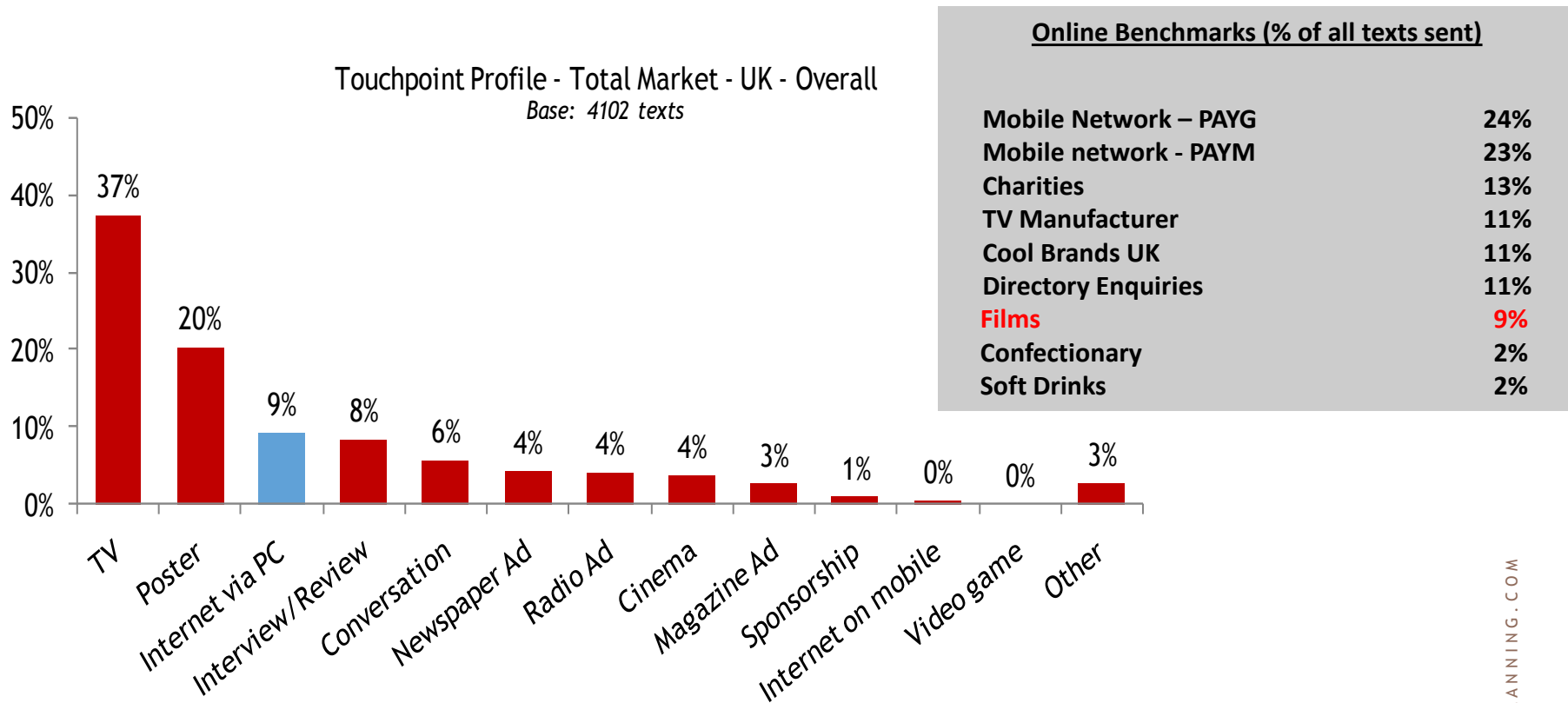
- Doing something more dramatic pays off
 - Newspaper spend for TDTESS was 5 times as efficient as that for Australia
- Use the Newspaper activity for TDTESS as a case study for other future launches
- This is an excellent example of where the creative worked in harmony with the media channel
 - A bold headline news story - The Day the Earth Stood Still worked through the newsprint channel



Online / Digital



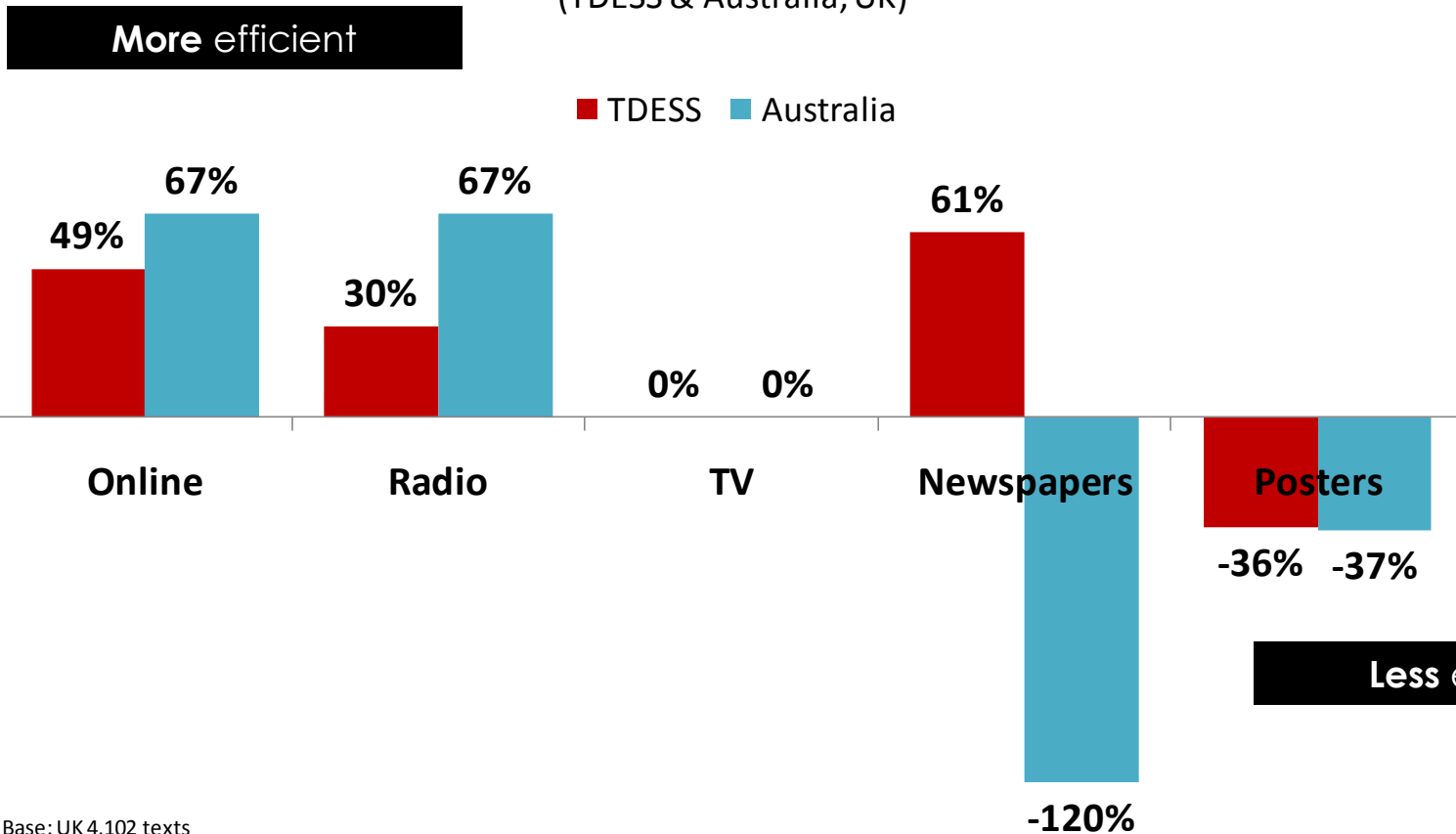
Compared with other markets, Online has a lower Touchpoint Share for 5 Target films



This, coupled with its Cost Per Touchpoint efficiency, suggests it is *an underutilised channel for film marketing*

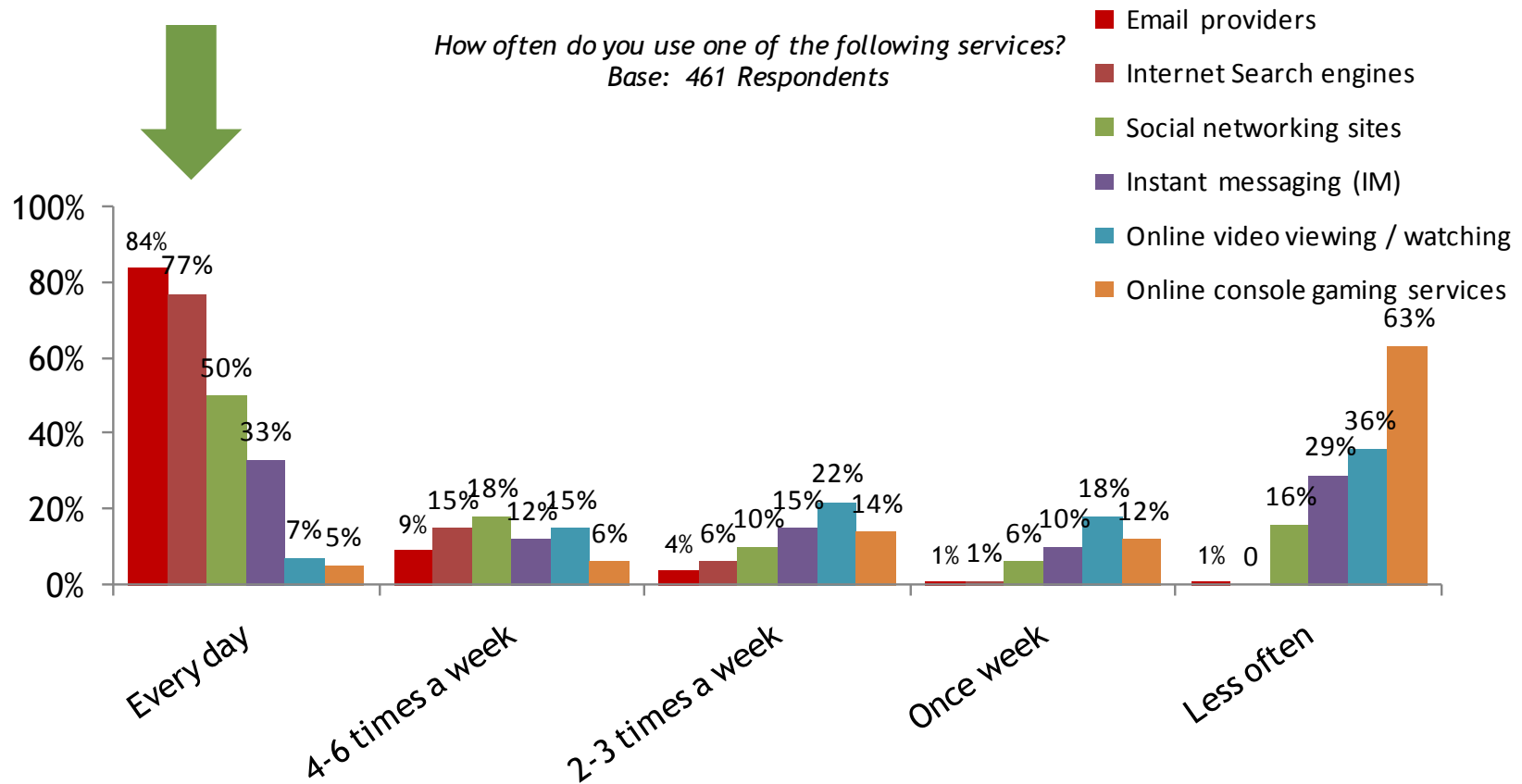
For the 'Fox' films, online proved more cost-effective than anticipated

Cost Efficiency - Index vs. TV
(TDESS & Australia, UK)



1) TV: Reference to TV ad
 2) Online= approx. 50% have been identified as related to seeing a banner/ad or trailer (remainder is Interview/Review or something else)
 3) Newspaper= about 33% have been identified as relating to an Ad specifically, rest is something else
 4) Radio= about 10% have been identified as relating to hearing an ad specifically, rest is something else

Digital usage levels further highlight the under-utilisation

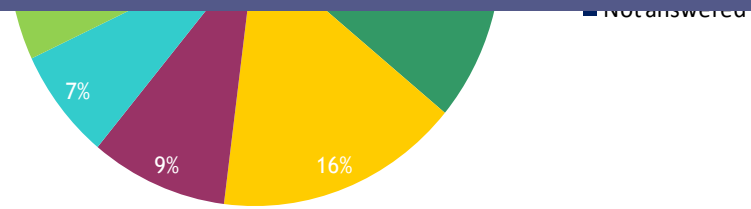


Online touchpoints experienced throughout the day, particularly afternoon/early evening...

Internet Via Pc By Time of Day
Base: 379 Texts

10% on a 'variety of websites'

From diary comments we can see that our participants were often **checking out cinema times** and preparing for cinema trips & **reading up reviews and interviews**



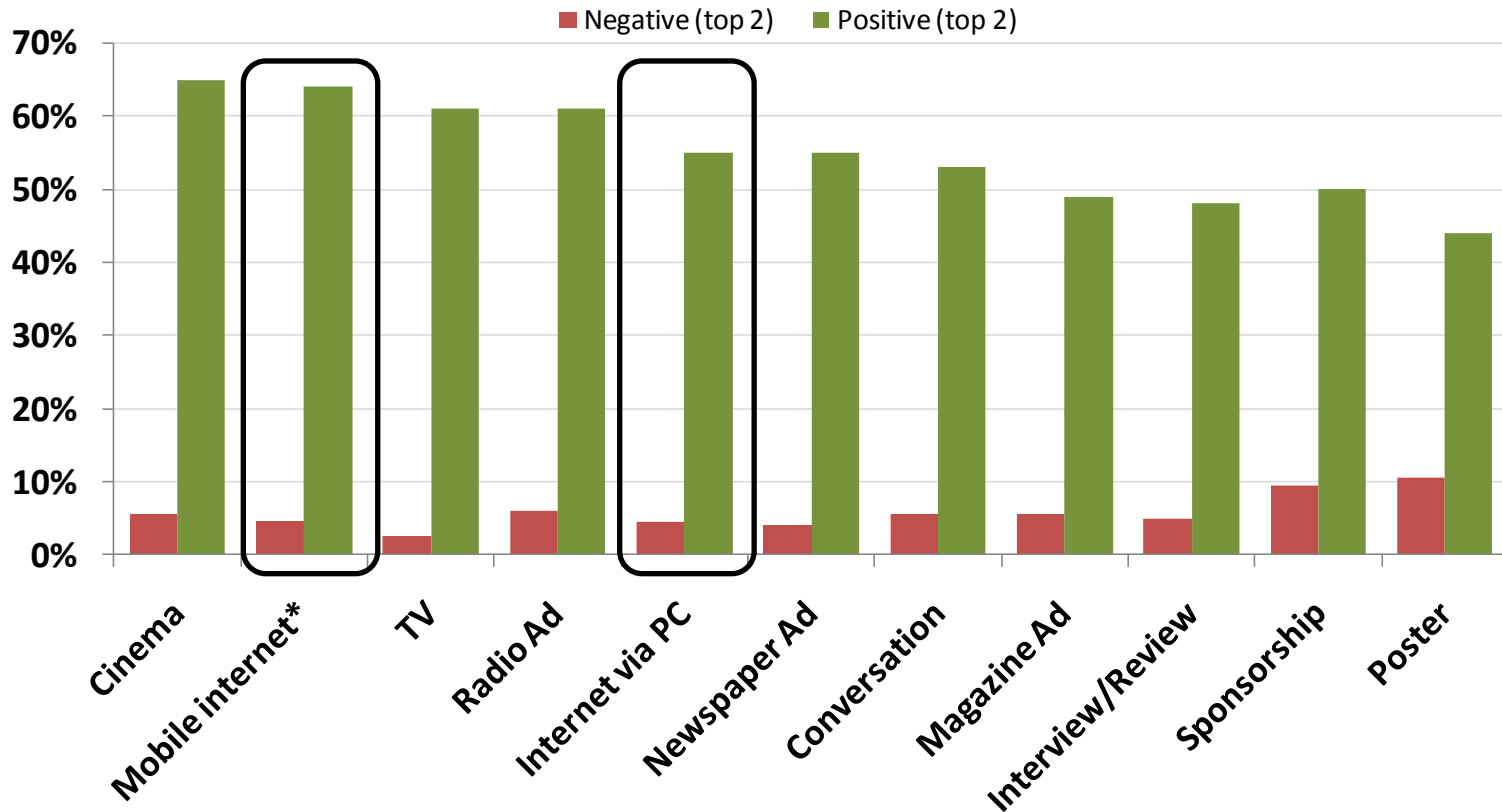
WWW.MESHPLANNING.CO



Source= Current Brand Experience (Text data + comments from Diary)

Strong positivity for digital touchpoints

'All Film' Positivity vs. Negativity (UK)
ranked by net positivity



Base: UK 4,102 texts; * sample size <50



A great environment for trailers

content vs. context

“Saw the official trailer in HD format. Was impressed by the plot, it was quite engaging.”
(The Day the Earth Stood Still, Attention, Very Positive)

BLAH BLAH BLAH.

o haiku



adrenaline: adventure trailer makes me want to watch the film”

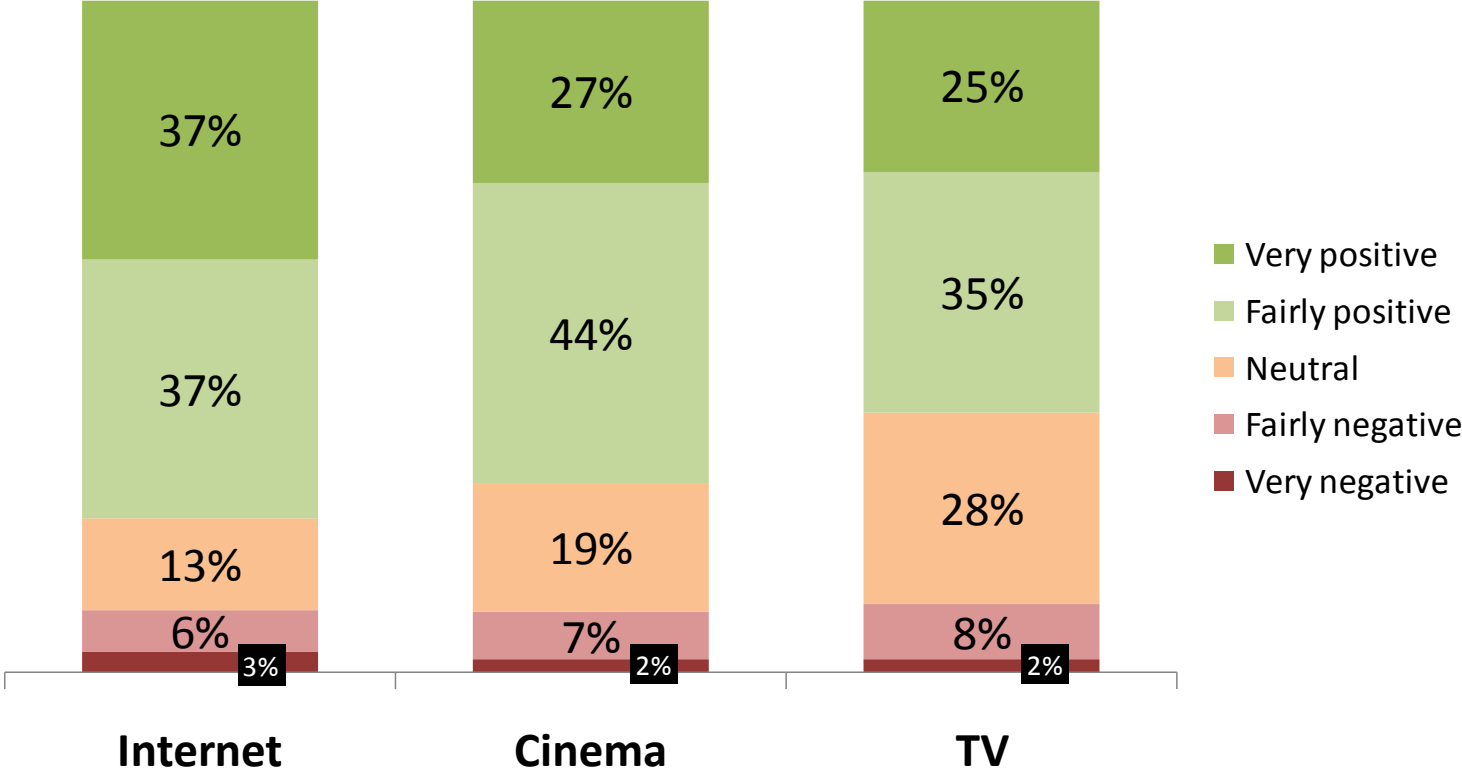
(Internet via PC, Very Positive,)

“Just watching the trailer was wow, this looks such a good idea.”
(Australia, Internet via PC, Very Positive High Attention)

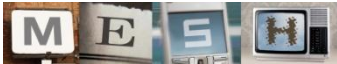
A great environment for trailers

Online trailers most positive

'All Film' Positivity for Film Trailer Touchpoints (UK)



Base: UK 1,534 texts



Mobile shows strong potential (FR) *especially for film trailers*

1. Unplanned discovery of text-based information

“I saw a link about the film on Vodafone live homepage.” Largo Winch, Internet Via Mobile Medium Attention, Fairly Positive (FR)

“I was reading some news on my mobile internet” TDESS, Internet Via Mobile, High Attention, Very Positive

2. see ads while browsing that they follow to watch the trailer

“I saw the ad while connecting to my video/TV service on my mobile phone then I watched the trailer which interested me quite a lot because it portrayed the genre of the film and gave me a good impression.” Australia, Internet Via Mobile Medium Attention, Fairly Positive

3. sending trailers to friends a great way of getting people to talk about the film

“A friend sent me the trailer for Australia on my mobile via the website AloCine.” Australia, Internet Via Mobile, High Attention, Very Positive (FR)

WWW.MESHPLANNING.COM



Recommendations for Online/Digital

- 1) Increase spend in the Online channel
 - cost efficient vs. TV and Posters
 - enables the cinema experience to come to life thru trailers
 - Online trailers most positive thru their pull-based nature
- 2) Review creative for online ads to ensure they more efficiently lead to a trailer view
 - Currently most people seeing trailers are looking for them
- 3) Facilitate sharing & remember value of the interview/review
- 4) Get creative - many cinema-goers welcome intrigue

Recommendations



Overall Recommendations

Media Mix

- Consider re-deploying some of your marketing spend from Posters to more cost efficient channels
 - In particular to Online which looks to be more efficient and can provide trailer views
 - But also consider Newspaper and Radio too

Cinema

- Trailers in cinema are so positive, we recommend looking at how they can be shown in other channels
 - E.g. interactive posters, online
- Tailor cinema posters to the environment
 - E.g. 'Next time see...' type messages on exiting the cinema
 - E.g. call to action, such as 'Buy now to avoid queues/receive offer'

TV

- TV ads give people an experience close to the cinema trailer experience in Positivity so continue to invest heavily in this channel
 - Particularly if the films are targeted at women or families
- Look at how TV can drive online
 - To get a longer trailer experience
 - To find more details about the film

Overall Recommendations

Posters

- To reduce wearout of Posters
 - Run a number of executions (within the creative restrictions for films)
 - Where possible tailor to
 - Short visibility time (e.g. roadside billboards, bus sides, billboards visible from moving train) needing high impact
 - Areas with longer dwell time (e.g. bus stops, train and tube stations, tube cards) where more information can be given
 - Consider testing
 - Digital posters to increase engagement
 - More interactive devices such as invitation to download trailers

Online

- Capitalise on the Online channel through further investment
 - It is cost efficient versus TV and Posters
 - It enables the cinema experience to come to life through trailers
- Review creative for online ads to ensure that banners and skyscrapers more efficiently lead to a trailer view
 - At the moment most people seeing trailers are looking for them

Newspapers

- Do something more dramatic as for TDTSS (5 times as efficient)



Microsoft - our actionable findings



Microsoft - our actionable findings

Marcoms/advertising

- Broader role for digital than expected across ‘Journey to View’
- Online trailer positivity challenging traditional deployment approach
- Creative strategies - in the digital film world intrigue not only works, it’s often expected!

Editorial development - MSN

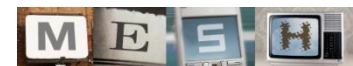
- Role of interviews and reviews in final “decision to view”
 - influencing approach to film editorial content and a focus on video-based interviews & reviews

Fox - our actionable findings

“The MESH real-time research approach demonstrated that it could provide a more detailed view of the ways in which different channels were helping build perceptions of our films in their run up to release. As well as providing some interesting metrics on channel impact and affinity, the results also threw up some great qualitative insights on the roles different media can play.

Over time, with more studies, we would hope to gain greater insight into specific genre, or audience, norms that we can use to inform our campaign roll-out and improve our media ROI.”

Mark Gent - VP, International Media & Research

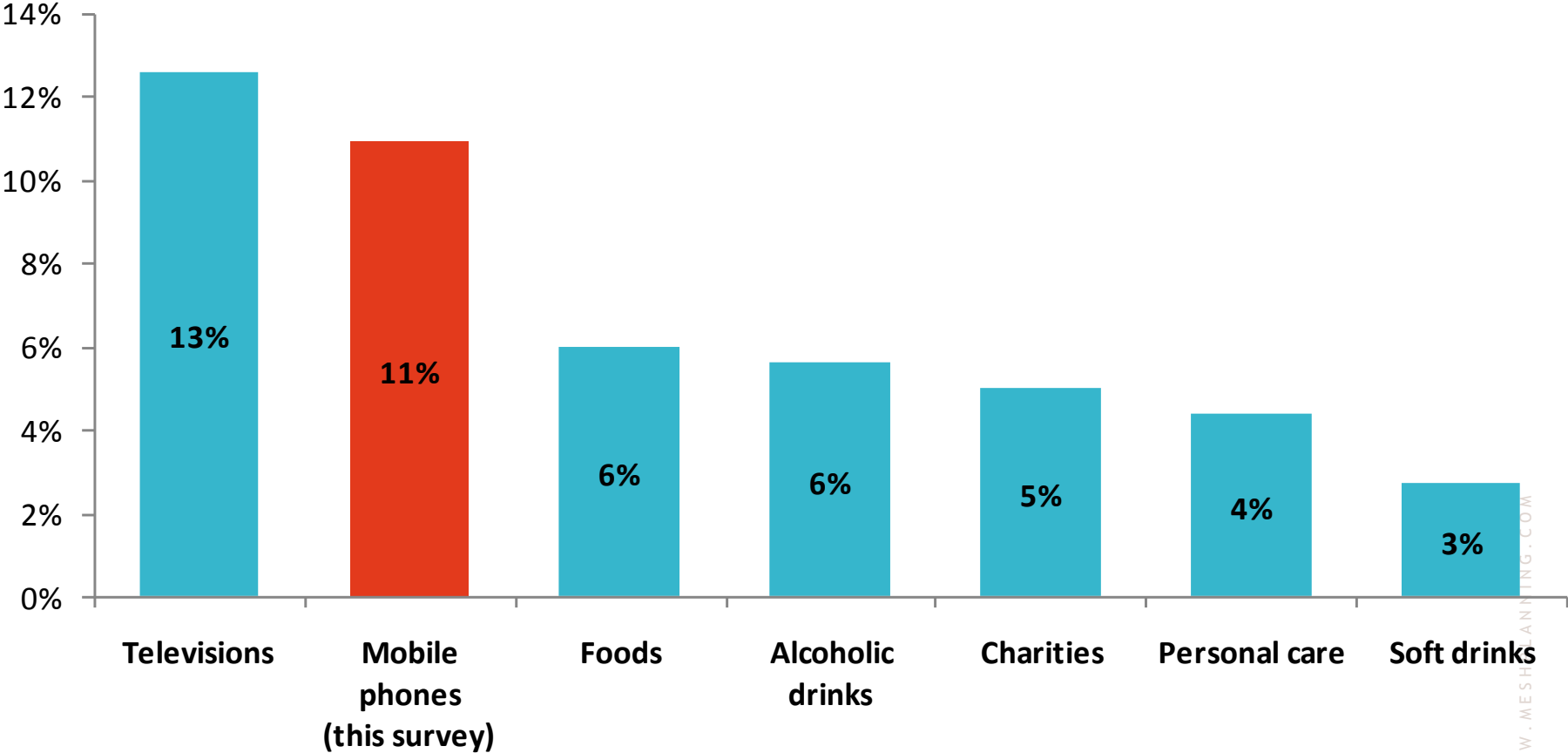


How WOM can effect the customer experience

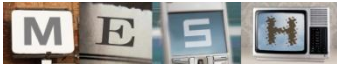


Lots of buzz in mobile network market

Conversations as a % of all touchpoints across various surveys



WWW.MESH-ANALYTICS.COM



Prompts for Conversation

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

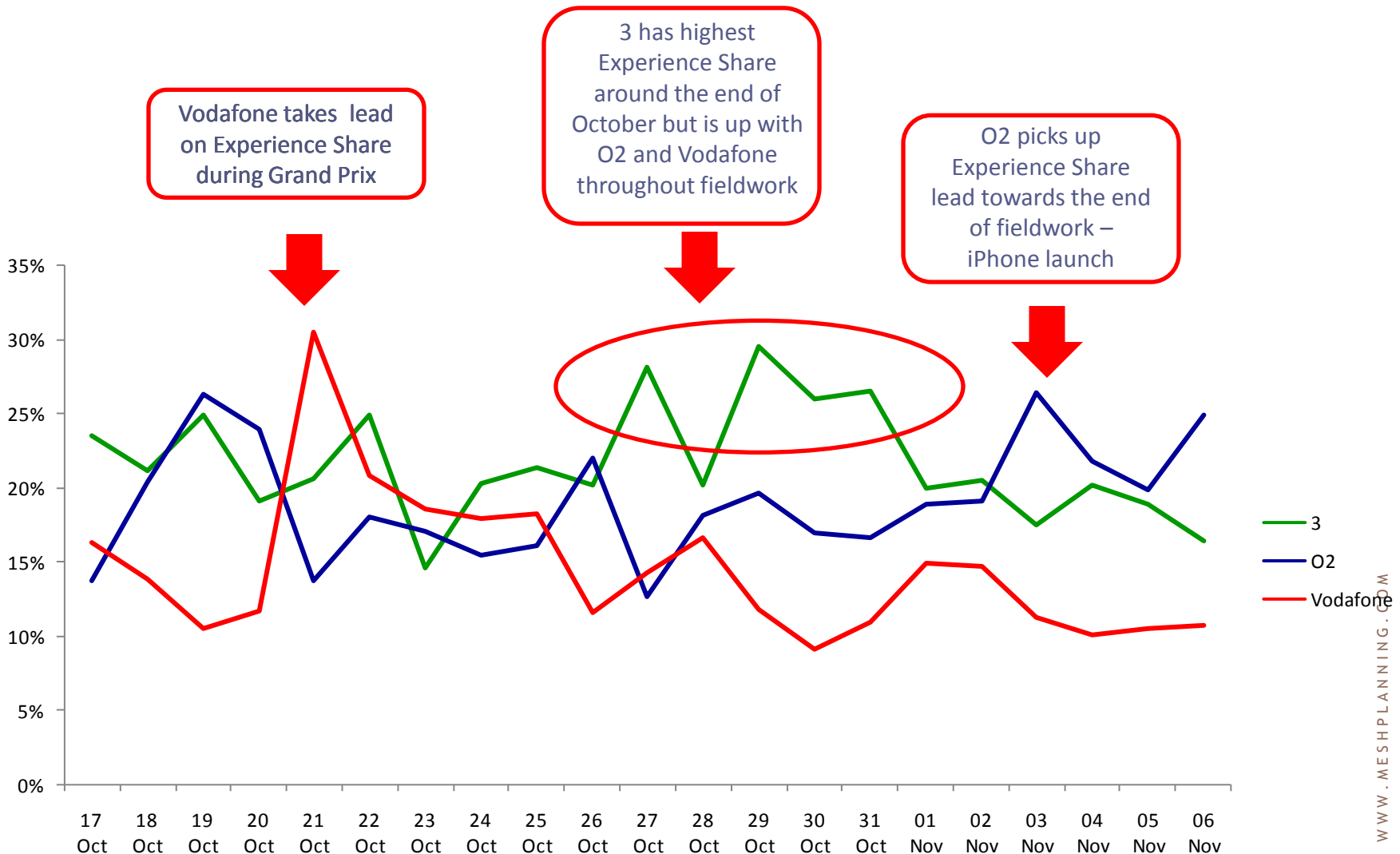
“Speaking to a friend about good service I receive from O2. Just been given treat of extra 20 free minutes a month for 3 months.”
O2, Conversation, Very Positive

Offers

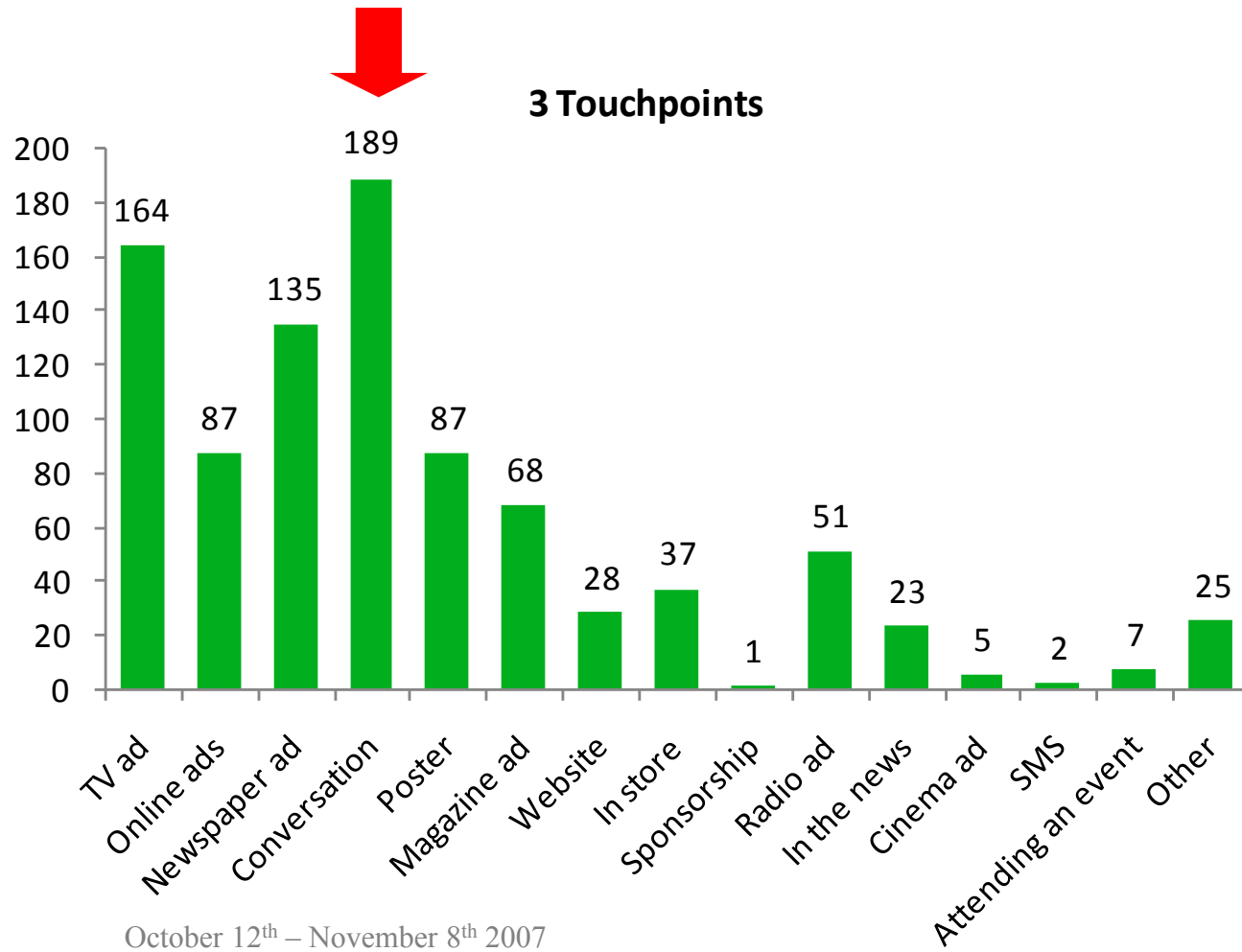
“My friend was telling me about an offer she received through the post.”
T-Mobile, Conversation, Fairly Positive

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

Smallest mobile network, 3, has highest Experience Share in October 2007



Conversation is largest touchpoint for 3



Major innovation being advertised

Innovation through
*mobile broadband and
Skype*

“Skype on a 3 contract - sounds great.”

3, In the News, Very Positive

“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.

Skypephone:

£12 a month. 100 mins or texts

£15 a month. 300 mins or texts

Get Skype freedom

- Easy to use - get free Skype calls anywhere in the world at the touch of a button
- Mini-to-Skype chats always on
- Fully loaded phone with a 2 mega pixel camera and MP3 player
- Call and text with your favourite bundle, just like a regular phone

Call free 0800 358 9041

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

Free for 12 months

Houses for purchase

Sell and stay in your home free or at a low rent on fixed terms available

Any price

Vacant or rented home with planning, legal and

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 cash

An alternative to bridg

A sale the w

Free appraisal, no legal costs paid. C

24 hours if required

It's easy, it's fast - c

0800 035

swiftcapita

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.”

Conversation with
influencer

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

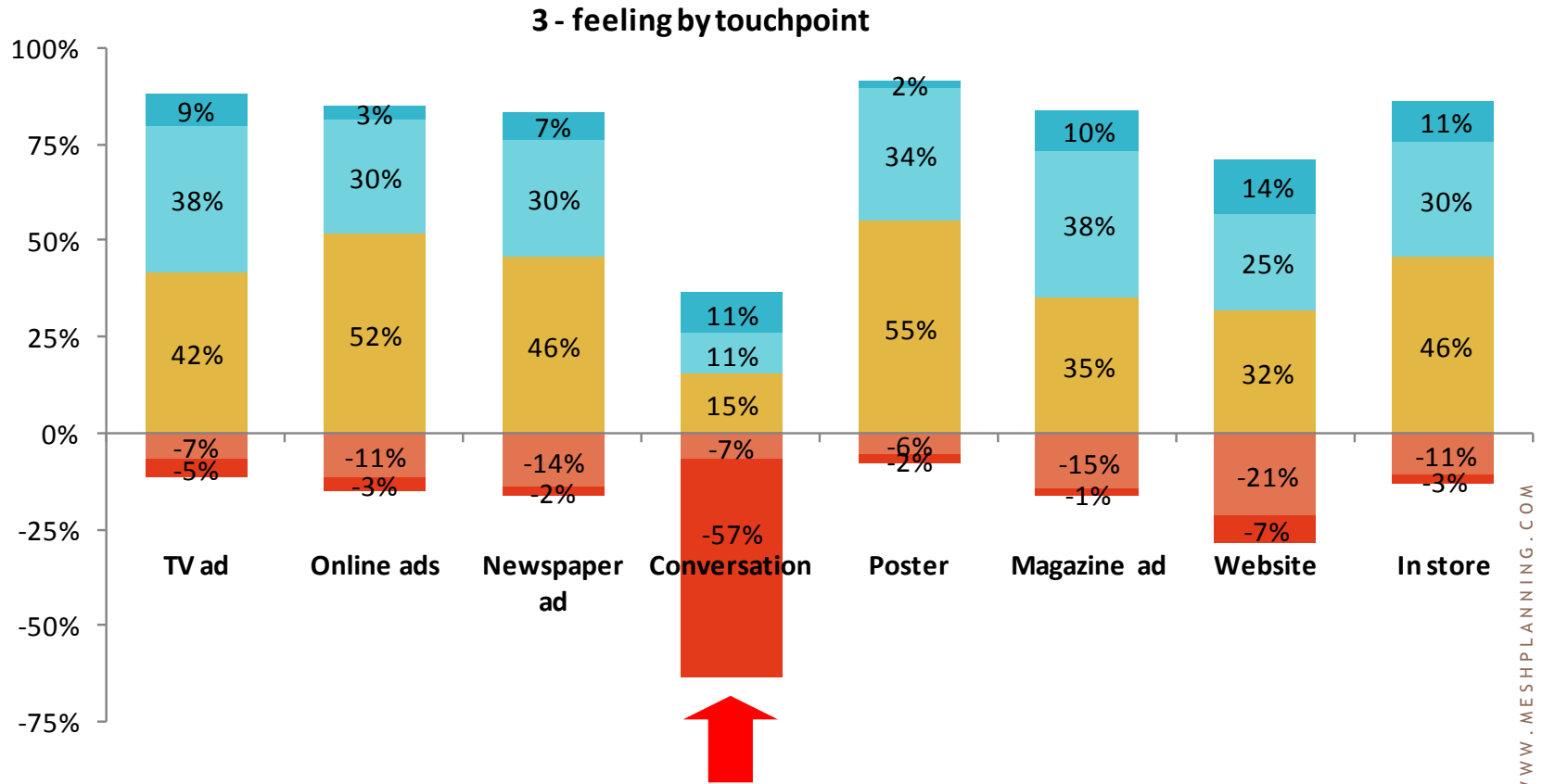
“Conversation with work friend about the 3 laptop internet card I saw advertised earlier, he had heard that this works much better and is also cheaper.”

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.”

Strong Polarity!

Lots of *conversations are negative*



What was the negative buzz about?

*“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 a 3 deal** and couldn't get his money back for ages”*

3, Conversation, Very Negative

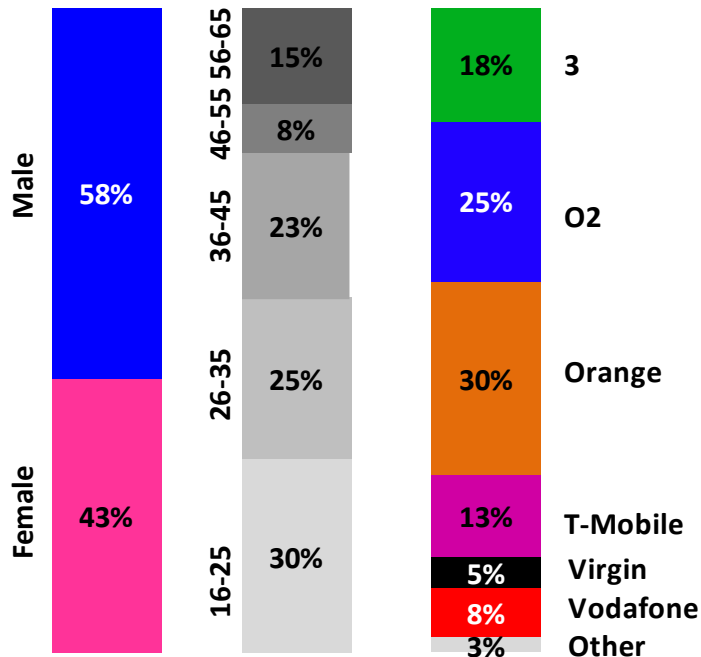
*“My friend was saying **how bad the customer service** is with 3, and what a bad experience she had dealing with them. I stated that I had similar problems in the past including the bad coverage.”*

3, Conversation, Very Negative

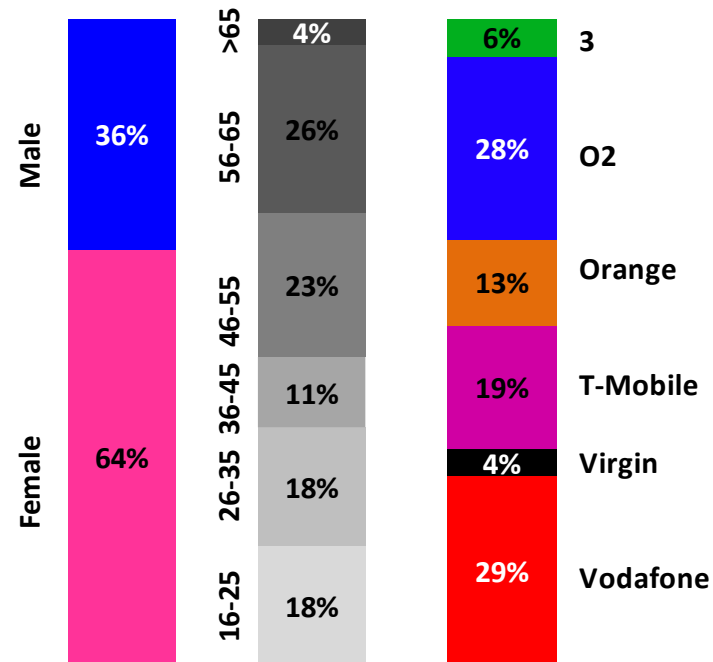
Who is having these conversations?

Positive conversations about 3 (40)

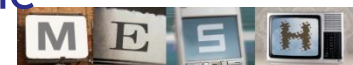
Negative conversations about 3 (120)



Young males on Orange



Older women on O2 and Vodafone



Impact on Brand Equity

Mean Favourability
Score

Positive Conversation



Pre 6.5 - Post 7.3

Negative Conversation



Pre 4.3 - Post 3.6

Insights in mobile networks WOM

- We could see what types of marketing activity drove WOM...
- ...as well as the organic WOM in the market we could tap into
- WOM can effect overall prominence (Touchpoint Share) of a brand and this wouldn't normally get picked up in traditional approaches
- It can also have a powerful effect on brand equity

How has Experience Data profited clients?

- 360 degree perspective - channel planning
- ‘early read’ on campaigns - optimise roll-out
- Real life view - fresh perspectives
- Consumption touchpoints - usage and attitude
- Database - planning tool