Bucks New University

This dissertation is submitted as partial requirement for the Degree of Bachelor of Arts (Honours) in

Advertising Management & Digital Communications

Do FMCG brands have a genuine role & relevance on mobile devices?

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May 2012

Acknowledgements

I will do my best to keep this short as there are so many of you to thank and had to put up with me during this time.

I would like to say a special thanks to Mindshare who have helped me enormously from the research process, right up to the deadline and providing me support to present this paper at the Annual Edcom Conference. Thank you also for giving in and offering me a job.

Thank you to all my interviewees for your individual contribution and those who helped in the process; James Chandler, Becky Messure, Antonio Priore, Lee Roberts, Paul Berney, Nic Clumisky, Craig Lawrie, David Titman, Natasha Spencer – Warren, Kerry Datlen, Emily Smith and Adam Stanley. Extra big thanks to James for giving up more of your time, effort and help on this.

Thank you to Bucks marketing guru's Vic Davies, Ruth Hickmott and John Hathaway for your support in this dissertation and throughout my time at university.

Thank you to friends and family who have supported me throughout university and particularly this dissertation. Extra thanks to Nathan for the support.

Special thanks to my Dad for bravely taking on the role as Chief Proof Reader and supporting me through university life.

“*We are over, over obsessed with the technology, not what it’s actually offering.”*

Sir John Hegarty (2012)

Abstract

Ownership of the mobile phone is now at 93% with half the UK population owning a smartphone, consequently becoming fundamental to the everyday lives of the 21st century consumer (GB TGI 1993 – 2012). The marketing communications industry however, is frequently criticised for obsessing over the technology, as opposed to the benefits of what this highly personal device can achieve for the brand. As clients remain ever hesitant towards implanting the medium into their media plans, mobile advertising spend continues to hover around the 3 percentile figure, despite such rapid adoption of the medium.

Unilever have begun to set the benchmark in the FMCG sector and this is discussed in the paper with key leanings, outcomes and challenges to overcome for the future of mobile. In contrast, brands such as Nestle are yet to find their relevant mobile existence as they continue to focus offline with minimal innovative digital activity.

This paper aims to critically analyse the discontinuity between consumer's ownership of the smartphone and FMCG clients implementing mobile into an integrated strategy. Additionally, this research aims to provide a strong case for agencies to communicate these findings to their clients, ultimately taking the step forward to increasing the 1% of the overall budget allocated to mobile.

Examined are concerns and obstacles preventing brands from implementing mobile into the media plan and whether this increases for brands without the comfort of 'bricks and mortar' at their own point of sale. Incorporated are issues of standardised buying and measurement methods, consumer data concerns and the client to agency relationship. To argue the case, relevant concepts and theories are applied, combined with the methodology of primary research. Qualitative data investigations involved face to face interviews with 7 marketing communications professionals from organisations including; Mindshare, O2 Media, Google, and The Mobile Marketing Association (MMA). Findings were then critically analysed against academic theories including the research of Pringle & Marsh and 'the media flow', Daniel Kahn 'systems theory', and Maslow's Hierarchy of Needs revisited, amongst other prestige concepts.

From this, robust recommendations for clients, agencies and the industry as a whole are clearly set out whilst raising further questions to be researched as developments become more prevalent and increasingly in demand. Ultimately, the research seeks to provide a step forward in the application and experimentation of mobile. In no way does this paper provide solid answers, but merely directs educational considerations that the industry is desperately lacking.

CONTENTS

1.0 INTRODUCTION

To break through the 5000 messages consumers now face on a day to day basis, understanding the consumer journey and their mood state at each touchpoint has become the core focus of the media agency.

46.5 million adults in the UK now own a mobile, while 56% of these have adopted to the smartphone device. (**GB TGI 2012 Q1)**. Sir John Hegarty's statement implies the focus has previously been on the technological trends with the fast paced advances of the device, as opposed to the relevancy and role of the smartphone within the consumer's life. For this reason, the research does not delve into specific trends of the technology. It does however; seek to explain the wider contextual implications of the device on consumers as a consequence of their usage of the smartphone.

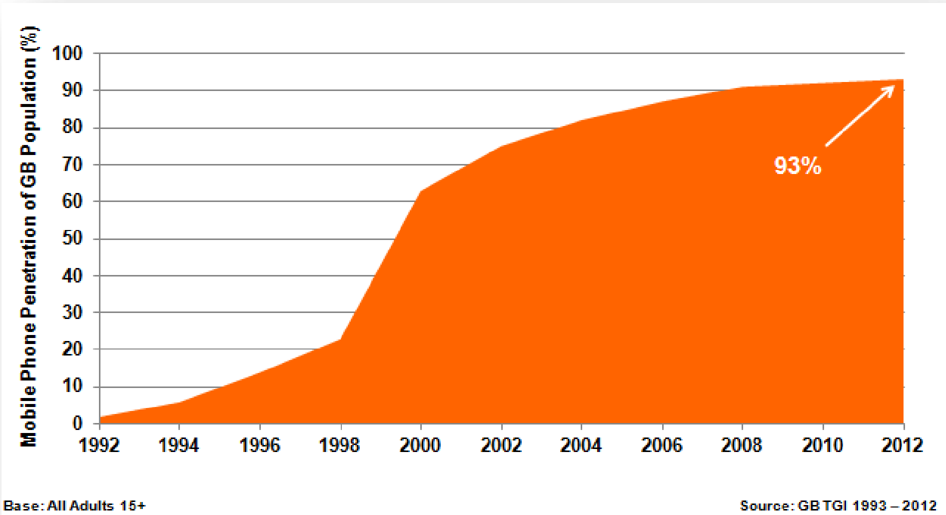


Figure 1: Mobile Phone Penetration 1992 – 2012 GB TGI 2012 Q1

Argued by David Titman, Brand Manager at Unilever "everyone wants to prove it works so there's so much research." Evidence from additional primary research contradicts this however stating "educating clients is the biggest challenge" (Berney, P., 2012). To enable this report to play a vital role in educating clients, the research contrasts to quantitative publications and statistics in the trade press on a daily basis. This paper should educate clients on the fundamental shifts of the consumer that have led to such demands of the smartphone and the consequences of this for the advertiser.

The research will support the fundamental changes from the naive consumer from the 20th century in contrast to the consumer of today armed with the smartphone, and how FMCG brands should adapt. The intention is to provide media agencies with a strong case to educate clients in the implementation of mobile as part of an integrated strategy, reaching their consumers in new and innovative ways.

To embark on the examination of FMCG brands role on the mobile platform, it is first necessary to determine what this report considers as 'mobile' in order to address where mobile advertising should sit within this.

What is mobile?

'The great tablet debate' has been one of many in the marketing communications industry in relation to mobile in distinguishing between the mobile phone device and tablet computers. Since commencing the dissertation, additional research has suggested substantial differentiation in the way media is consumed from each platform. (Nielsen, 2010).For the purpose of the research, 'mobile' will be determined as an internet enabled mobile phone device by reason of its portability and specific user behaviours.

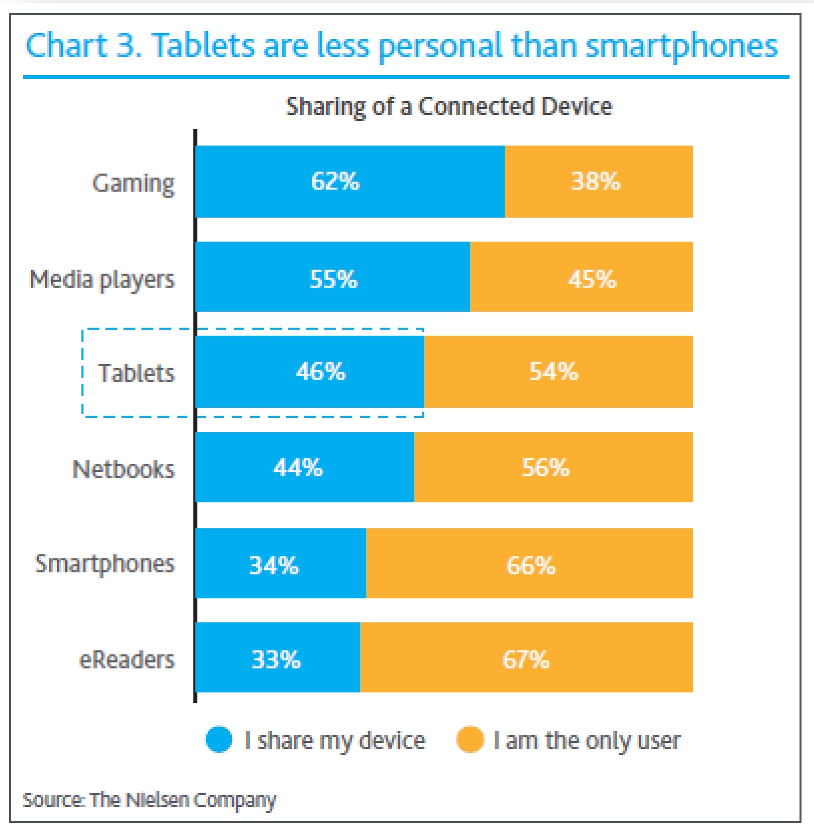


Figure 2: Source: Nielsen (2010) – Connected Devices

What is mobile advertising?

Advertising on the mobile platform was first introduced in the early 2000's in Scandinavian and Asian countries. "Several years later before it entered Europe and the USA, there was a feeling consumers would not like the idea" (Percy, L & Elliot, R., 2009). Due to the nature of the constantly evolving channel, an established definition of mobile advertising is yet to be industry recognised and reputable. Existing definitions attempt to address mobile as a marketing tool however are somewhat lapse in their approach.

The Advertising Research Foundation (2010) raises the concern that mobile advertising should be redefined in order to gain a full understanding of the opportunities presented in the channel. A close definition in the field is Brassington (2006) but defines 'wireless marketing' as "the use of text messaging via a mobile telephone as a means of marketing communication." The definition in the context of technological advancements at the time of publication of this research is misleading due to considerable developments to the mobile phone altering the meaning of terms such as 'wireless.' Discussed in this dissertation then are further advances to forming an industry recognised definition with the application of primary research. Additionally, the point is argued as to whether defining mobile advertising will provide a greater understanding the benefits of the mobile channel for FMCG brands or if in fact due to its changing nature, could a definition hinder the exploration and creative innovation. This will then begin to arrive at the proposed objectives to providing a creditable rationale.

The discontinuity between ownership of Smartphones in the UK and mobile advertising expenditure should also be investigated by means of developing recommendations with the aim to increase the current percentage at 3%. Additionally, the paper sets out to identify the underlying concerns behind these figures and how FMCG brands could find a presence on mobile.

OBJECTIVES

There are a number of objectives to be investigated in this dissertation in order to achieve the projected aim. There are;

1. To critically assess the role of the 21st century consumer and buying behaviours.
2. To explore consumers ownership and usage of technology.
3. To examine the consequences of consumers FMCG buying behaviours, technology ownership and usage in the current economic climate.
4. To identify a rationale for FMCG brands to be on mobile to a highly targeted audience.

2.0 Literature Review

This literature review aims to critically analyse existing research surrounding the role of the consumer in the 21st century, their new buying behaviours and usage of mobile devices. This analysis will then raise matters to be investigated further in primary research.

Aim: The purpose of the dissertation is to critically examine the role FMCG could play on mobile and how women will receive this communication.

Objectives:

1. To critically assess women's role as a 21st century consumer and buying behaviours in FMCG.
2. To explore women's ownership and usage of technology.
3. To examine the consequences of women's FMCG buying behaviours, technology ownership and usage in the current economic climate.
4. To identify and critically review a rationale for FCMG brands to be on mobile, targeting women.

After further research into the process of understanding women's buying habits and usage of technology, it was discovered that due to consumers constant evolving behaviours in the way they consume media, defining the target group by gender has become a far less effective practice. In the mass market period, demographics were sufficient to target a passive and 'prime time' audience of synchronised consumption. "As the internet business grew, so too did the measurement industry. Marketers were offered the opportunity to target consumers according to their behaviour and interests" (Green, 2010 pg132). This form of targeting has then reduced wastage of exposure to an irrelevant audience not engaged in the advertisement and has therefore been widely adopted by the marketing industry as mainstream procedure, recognised as behavioural targeting.

Further to this evidence, marketing researchers Kantar TGI were forced to adapt their researching methods to the paradigm shifts effecting modern society from targeting a mass market to the individual as a result of postmodern culture and societal adjustments commencing from the 1980's. (Cahoone, 1996 pg2).Reports were subjected to the term ‘housewives’ as opposed to ‘women’ as advertisers exploited the main purchase decider and the limited media available to communicate with consumers in prime time viewing.

Behavioural targeting then, is defined by Chaffey (2008 pg12.) as “personalised, relevant messages delivered for example by email or web which relates to customers current issues.” It is due to the significance of these changes that it is necessary to amend the current research question in order to reflect these changes in society and consequently, the communications industry to the following title, aim and objectives.

Revised Research title: “Do FMCG brands have a genuine role & relevance on mobile devices?”

Revised Aim: The purpose of this dissertation is to critically examine the role FMCG could play on mobile and how this communication will be received by a highly targeted audience.

Revised Objectives:

5. To critically assess the role of the 21st century consumer and buying behaviours in FMCG.
6. To explore consumers ownership and usage of technology.
7. To examine the consequences of consumers FMCG buying behaviours, technology ownership and usage in the current economic climate.
8. To identify and critically review a rationale for FCMG brands to be on mobile to a highly targeted audience.

The Consumer

Lewis & Bridger (1999) discuss the consequences of the shift from the old passive, naive consumers from an era of mass market distribution, to the engaged, involved and individual New Consumer. This is portrayed in three main concepts relevant to the research project. These are; Teserac’s , The Anatomy of the Soul, and ‘Tastespace.’

Discussed is Shel Silverstein's adoption of the word '**Tesarac**' to depict periods in history where "society becomes increasingly chaotic and confusing before recognising itself in a way that no one can accurately predict or easily anticipate." Additionally, Kuhn's paradigm shift detects technological and political evolutions and can therefore be applies to argue the New Consumer as a result of the wider context (Cahoone, 1996).

Evidence of this to be true to today's society rests in the economic downturn resulting in the emergence of BRIC countries dominating the world's leadership, resulting in governmental matters in the UK to be strenuous on the everyday life of consumers. This is particularly true for advertisers as a result of social media playing a vital role in the unpredictability of WOM surrounding the brand. Observing this concept, that a world now exists where "old things are dead or dying and one cannot easily make out what will happen next," can be applied to the matter of the long – term effectiveness of a brand surviving in such uncertainty. Supporting the argument of uncertainty faced in the industry is the continuity of publications predicting technology and consumer behaviours. Research companies such as Millward Brown, Deloitte and Value Engineers strive to provide these on a regular basis as the demand for these insights is imperative.

Millward Brown (2011) warns of the implications of marketing in uncertain times presenting the danger that "in times of economic uncertainty, marketers tend to shift their focus from long – term strategy to short – term sales." While Silverstein's and Kuhn's concepts are both well established in academia and can provide a greater depth to the research, Millward Brown investigate the implications of the recession on brands in the 21st century and is therefore a worthy concept to apply directly to the research project in achieving the objective 3. This should then be applied to the findings of primary research to be conducted to determine the final objective and aim of the dissertation.

Anatomy of the soul

Lewis & Bridger (2001) stress '**The Anatomy of the Soul**' shown in Figure 3 that has since emerged on the other side of the Teserac in the following diagram.

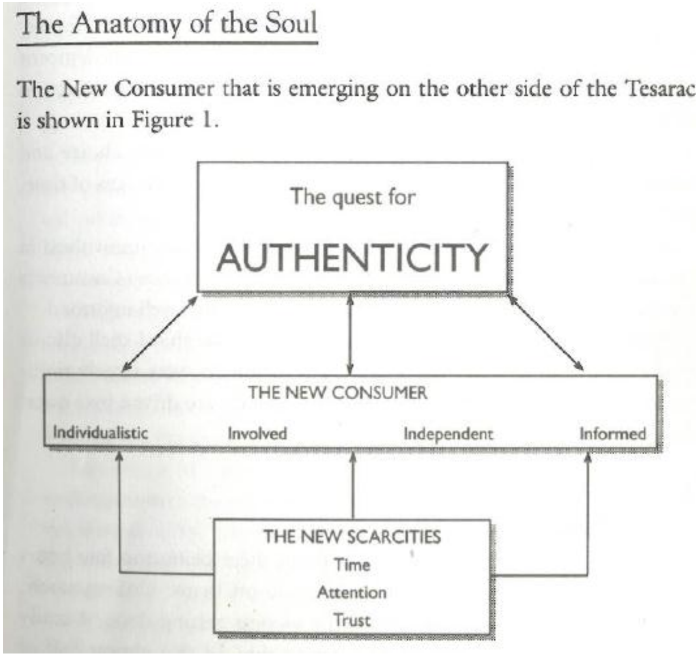


Figure 3: Lewis & Bridger (2001) Anatomy Of The Soul

The model represents "where the Old Consumer was synchronised, conformist and often woefully uninformed, New Consumers are individualistic, involved, independent and generally well informed." The model therefore articulates the need in putting consumers first in aspects of the business in order to guide them on the quest for authenticity. However, as PESTEL factors are dramatically changing consumer behaviours and attitudes at an alarming rate, it is worth considering how this model has shifted into more complex dimensions since publication.

The disadvantage of using this model however, raises a somewhat linear perception of the path to shelf space of the consumers mind. Despite the identification that the New Consumer has differing habits to that of the Old Consumer, that matter that the model has been developed suggests that there remains a linear way to engaging with the consumer.

Maslow's hierarchy of needs suggests a similar linear approach to the basic needs and behaviours of the human being. If marketers are going to genuinely understand their consumer's motivations, extensions of this should be investigated and specific to FMCG.

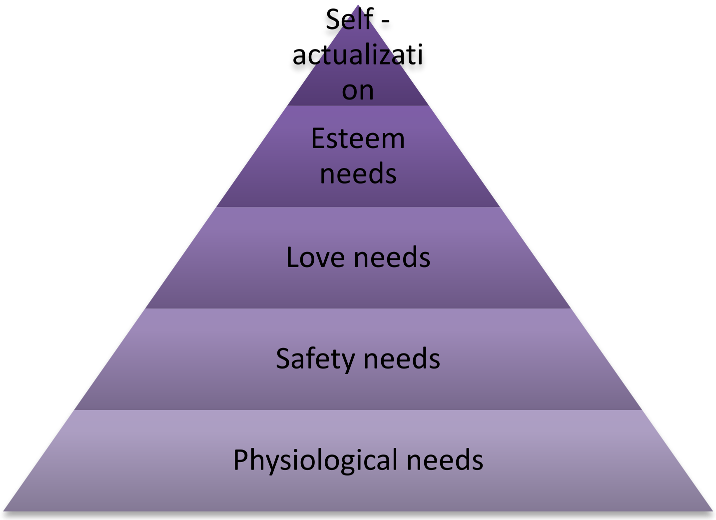


Figure 4: Maslow's Hierarchy of Needs

Alderfer (1972) criticised the hierarchy of needs in the conclusion that there are only really three sets of needs that rest in existence, relatedness and growth. "He considered that people were more likely to move up and down the continuum in satisfying needs at different levels" (Cole, G.A. ,1996). While Maslow presents the basic needs and requirements, the model lacks depth directly in relation to the research question. As an understanding of consumer behaviours in terms of their media usage and buying behaviours, an alternative model would provide a greater depth to the discussion and a more relevant context than basic human motivation. Mary Meeker developed this at the Web 2.0 Summit (2011), suggesting a revised hierarchy of Maslow with the addition of internet and mobile. While Meeker's proposed 21st century adaption of Maslow's hierarchy of needs is ambitious to claim applying internet and the mobile phone, the evolution of technology enabling connectivity is a worthy addition to consider in further research.

Marketing expert Keith McNamara as cited in Lewis & Bridger begins to differ this approach in discussion of the tastespace defined as "gathering and analysing sufficient data on their patterns of consumption and lifestyles to identify something as unique and as personal as their fingerprint." A development from the method of segmentation widely deployed by the use of linear demographics, Tastespace analyse allows for greater targeting with online as the main driver for behavioural targeting. In analysing consumer's Tastespace, this enables advertisers to tailor content according to these behaviours, resulting in an increase of effectiveness of the campaign and essentially ROI. Driving this analysis is the handling of data available from online behaviours to determine the consumer journey from exposure of an ad to point of sale. While measuring online exposure to online sale has become relatively common practice in the industry, measurement of online exposure to offline point of sale is a lost measurement. Availability of such data is therefore predicted to increase as penetration of mobile web access dominates internet usage from the desktop. Solomon (2006) defines point-of-purchase stimuli as “the promotional materials that are deployed in shops or other outlets to influence consumer’s decisions at the time products are purchased.” The research in measuring this touchpoint is currently under debate in the industry. However, conducting primary research analysis and secondary data surrounding the point of sale aims to provide a step forward in the approach.

Demand in discovering the buying influences at the point of sale is high as research from consumer focus groups can prove to be ineffective and inaccurate. This is due to the fact that consumers are often unaware of their purchasing decisions at this point, with particular relevance to low – involvement FMCG products. It is therefore a worthy argument to consider that this may be an area of investigation for the role of FMCG brands on mobile devices in fulfilling this need for advertisers to truly understand their consumer’s Tastespace of buying patterns on an unconscious level.

Similar to this concept is psychologist Daniel Kahneman’s (2011) cognitive theory of System 1, System 2 shown in figure 5. The theory discusses the process of how people think, and how they buy. System 1 reflects that of the unconscious and quick mechanism to thinking. This then presents the existing challenge for marketers to tap into with knowledge of their consumer’s Tastespace. Employing this psychological approach is of advantage to the research project to then determine a state of mind of the consumer to receive mobile communication from FMCG advertising. Development in this area will begin to understand the objective for a rationale of FMCG brands on mobile.

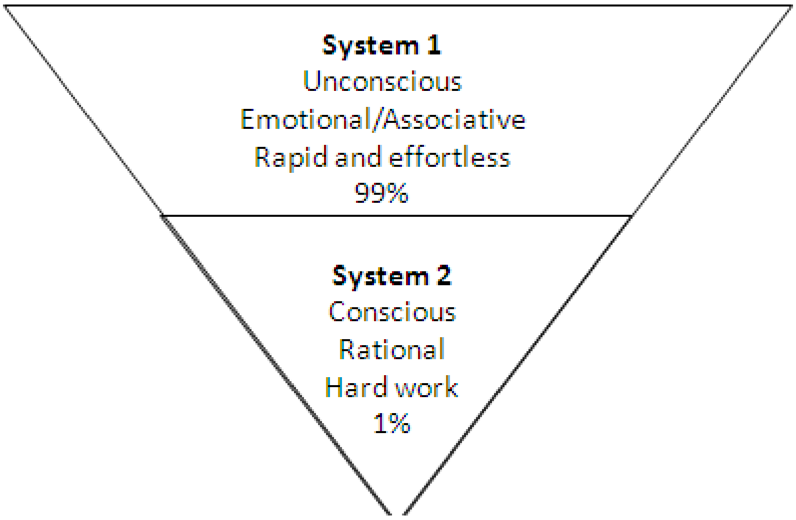


Figure 5: Daniel Kahneman System Theory (2011)

The need to address the 99% unconsciousness relies on the role and relevance of the ad, to be in the right place at the right time. Gordon & Valentine (2000) reflect this idea in stressing the importance of the creating a moment of identity. Although this research is dated, the theory is recognised and respected as academic theory. This can then be explored and analysed with primary data in the aim to achieve research objectives.

83% of media consumption still takes place offline (IPA Touchpoints 3). This then presents the opportunity to be researched in a multi – screen technique of advertising for FMCG. Jim Taylor discusses in WARC the importance of in – store as the key arena for mobile communications. Issues are raised in the usage of shopping lists and LBS direction to product. Research conducted by Promise and Mindshare however, recently determined that consumers are not yet ready for such a need unless it delivered a form of service make life easier. Sue Unerman (2011) strengthens this argument in blogging “if it is to be the year (decade) of the mobile next year, we’d better keep it simple.

Mobile Opportunity

AdMap (2011) predicts “as mobile engagement matures so too can we expect mobile activities to feature in those everyday contexts in which we find ourselves at a loose end, looking for worthy distraction in moments of planned or enforced downtime.” This then introduces opportunity for brands to benefit from consumers actively searching for engaging content on their mobile. However, it is the lacking of research currently available relevant to the role of FMCG that questions a relevant role for the particular sector.

Supporting AdMap’s prediction is ‘The Internet Access Point’ (Figure 6) graph publicised by Microsoft (2010) and predicts the cross over from desktop to mobile web usage as the dominating access point in 2013. This is a core driver to the success of the smartphone and is therefore relevant to discuss how this has affected the consumer’s attitudes to the device. Applied widely within the marketing communications industry, the graph demonstrates the scale to which this will affect how consumers engage with brands and buying behaviours. However, in such uncertainty, or in the era of a Teserac, it is therefore crucial to determine through further research if achieving long – term effectiveness of FMCG brands is possible in the use of mobile devices.

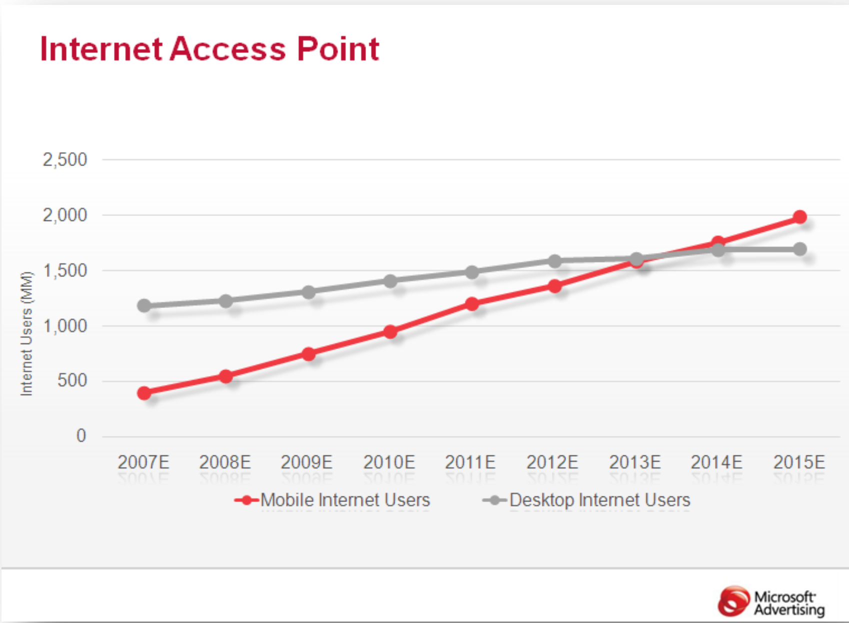


Figure 6: Microsoft Broadband Insights (2010)

Defining Mobile Advertising

The Advertising Research Foundation in (2010) investigated the opportunities available for the future of mobile advertising with particular focus on multi – screen and uncovers the following main themes;

1. "Smartphones are significantly changing consumers' relationship with digital media.
2. Despite claimed resistance to mobile advertising, consumers are actively welcoming brands in.
3. The opportunities differ from one vertical to the next, but none are excluded.

These are then relevant steps to be considered in achieving objectives of understanding consumers changing usage of technology.

Statements in the consumer research raise questions to discover a recognised definition of 'mobile advertising' since the increasing adoption of smart phones. "If it can better our lives, its better advertising."

The research illustrates that "61% of consumers are interested in receiving location - based coupons and offers with a further 24% of consumers agreeing they are comfortable paying for FMCG brands on their mobile." Mindshare present a contrasting view to this in their report on 'The Future of Mobile (2011), reflecting that consumers currently find a branded LBS app for in store promotions for FMCG's unnecessary, however, a role could be considered in displaying inspiration for meals. While these are significant developments in the field, in order for FMCG brands to exist in the long – term on mobile, a more prominent role should be established beyond sales promotion in creating a deep and meaningful relationship with the consumer. Further to this, ARF made the following conclusions and represent crucial steps to develop throughout the research in resolving the proposed objectives.

1. "We need to redefine 'mobile advertising' if we are to really understand the opportunities.
2. We need to be inspired by changing consumer behaviours and needs to think differently about how brands can best add value in the mobile environment."

It is therefore necessary to ask the following questions as a reflection of these findings:

“How do we define ‘mobile advertising?”

“Can mobile be used as a device to build on the long – term effectiveness of FMCG brands beyond the use of couponing?”

De Chernatony, (2010) defines branding as a “C*lusters of functional and emotional values that enable promises to be made about unique and welcomed experiences.*” The statement should be considered in the building of brands of mobile and developed with primary data to discover these possibilities.

Academic definitions of the term ‘mobile advertising’ are thinly evidential and often elusive in their approach. A close definition is Brassington (2006 pg. 632) but defines ‘**wireless marketing**’ as “the use of text messaging via a mobile telephone as a means of marketing communication.”

As suggested by the ARF, greater focus on the definition of ‘mobile advertising’ should be recognised in the industry to fully appreciate and understand the opportunities presented with the medium. The absence of such definition existing could be due to the ever changing and experimenting of the medium amongst advertisers that evidently, that there is no definition.
Issues surrounding the use of consumer’s data is largely debated and challenged. The Mobile Marketing Association (MMA), (2012) state in the code of conduct that “Mobile marketers must implement consent (opt – in) for a specific messaging program.” In the early days of e-marketing, consumers were bombarded with spam emails from advertisers exploiting the use of this method of communication. The application of ‘opt – in’ has therefore protected the consumer from this to reflect on mobile communications and prevent the advertisers from doing so. This conduct is therefore a crucial concept to implant to the research project. Guidance is provided as to restrictions and opportunities mobile presents and

As the year of mobile continues to present momentous opportunities for consumers and businesses alike, it is essential that advertisers take full advantage of an increasing rate of technological adoption as Ofcom reports that nearly one in three adults uses a Smartphone.

Role & Relevance

Role and relevance in the marketing communications industry refers to a need of understanding where your consumer is within the media day and their mood state to receive commercial messages that appropriately coincide. “Increased media multitasking and the popularity of online and mobile platforms have comprehensively broken the old mass media model, reaching consumers is an increasingly difficult task” (Gawor, 2011). Consequently, marketers are embracing the demand to tailor commercial messages in order to target a relevant audience to their product or service.

IPA’s TouchPoints study addresses this providing insight as to consumer’s media consumption at particular mood points to a particular time of day. The studies are applied in planning to then write advertisements in correlation to these mood points in order to engage the consumer in a more meaningful state of mind. Pringle (2011) however, criticises TouchPoints, suggesting its complexity as “we step from the life flow to the media flow. You drop in without noticing it.” The research projects a need to navigating the media flow that coincides with the consumer’s life flow on an unconscious level. It is this contextual consumption of media that the advertiser longs to understand, to enable a deeper relationship with their customer.

Pringle’s concept complementsthe research of Sue Elms’ Integrated Planning (2011) approach, reviewing in greater analysis the noise media at different points of the day. While Pringle employs a five point plan in placing the brand where a customer needs it, Elms develops this in depicting a cloud thinking approach that “will lead to treating each piece of brand communications as if it is the only piece, because you cannot rely on other contacts from the same campaign” (Elms, 2011).

The gap in which the research aims to fill is the qualitative understanding behind the construction and media planning of advertising in order to gain a full understanding of the issues and concerns facing the FMCG sector of implementing mobile.

Methodology

Secondary research for this dissertation was approached with the following method of information gathering in order to begin with a generalised view in the field of the dissertation to then narrow towards a level of depth surrounding the topic area for discussion.

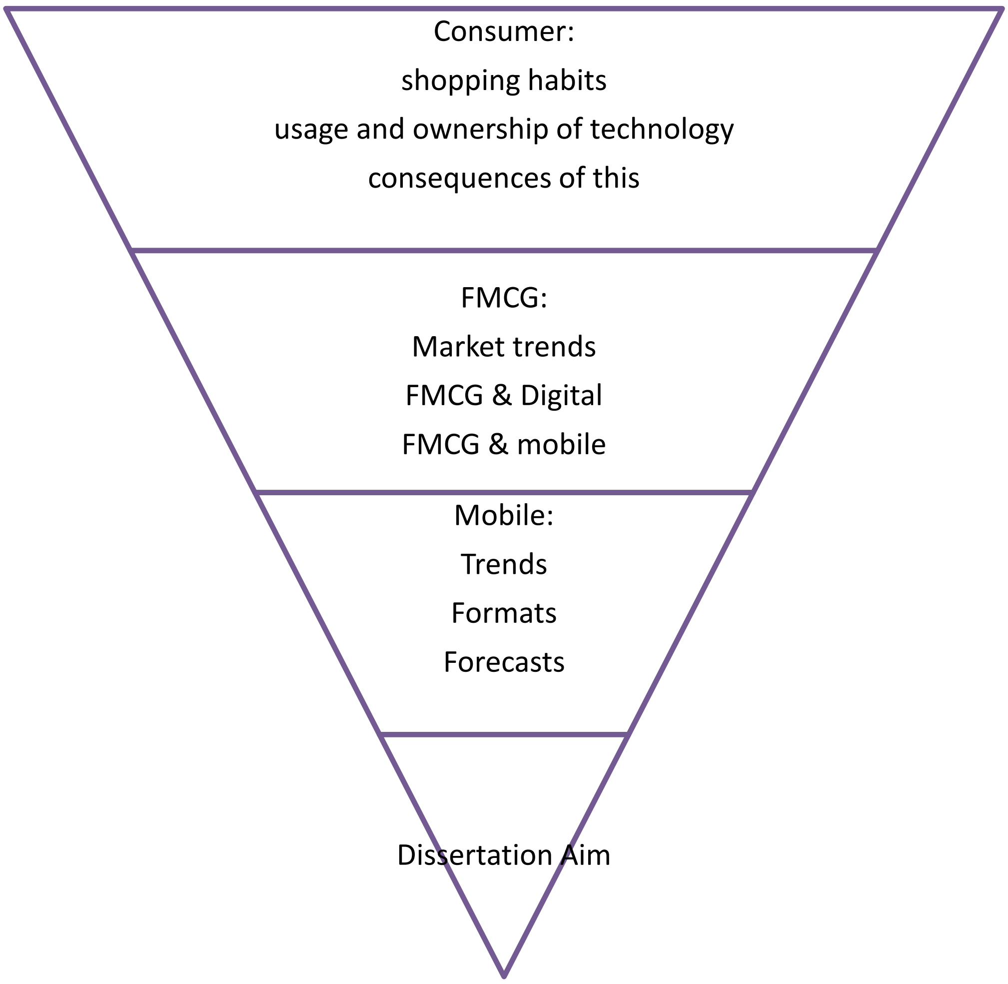


Figure 7: Secondary research method

Saunders et al (2003) define secondary data as “data used for a research project that were originally collected for some other purpose.”

<u>History of desk research</u>

Evolution of desk research is built on a number of important events in history that lead to a greater access of information. The progression of this comprises of crucial events in the history of research such as the ‘Burt Scandal.’ The death of Sir Cyril Burt (1971) resulted in a loss of original thinking behind his findings and consequently “this lesson has meant that many archives are now open and that raw data sets are available for further manipulation” (Fletcher, 1991). However, the most substantial movement in the market research sector was “the Penetagon’s Advance Research Projects Agency decision to link the computers of three American Universities. This was the start of the internet” (Bradley, N, 2010). From then on, research became increasingly accessible through the use electronic data transfer and search engines. Although search engines can often provide data of unreliable source, the likes of Google and Bing have enabled the internet to widen access points of information and provided “a no nonsense, quick engine, delivering very relevant answers to queries” (Bradley, 2010). It is due to the unreliability of sources singled out by the search engine that this particular type of research will be avoided. However, the internet will remain as a crucial access point to industry applied research.

<u>Internet based</u>

In order to explore supporting evidence already provided surrounding the research project, market research reports were explored to gather a depth of knowledge. Access to such data is often dependent on payment however, the internet allows for particular reports to be made public and free of charge. Finding such reports requires knowledge of the sites in which to research that are relevant and accessed widely in the industry such as The Mobile Marketing Association (MMA) or Internet Advertising Bureau (IAB). Appendix 1demonstrates the complex desk research market in which secondary research has been collated for the dissertation. As demonstrated in the chart, research sourced from Market research agencies such as AC Nielsen are used to provide insight to clients in the marketing communications industry. This research is then applied to the Market research publishers such as Mintel and DatamonitorEuromonitor to be accessed by media owners. These are therefore most relevant to be used in the dissertation due to their usage within the industry.

Applying this research in combination with primary research should then aim to achieve the objectives in providing a rationale for FMCG brands to advertise on mobile devices and raise any challenges to be addressed by the industry. Sources already recognised as respectable information enable the recipient, such as a client to understand the context of the research and trust as a reliable reference.

Research further conducted by media agencies and media owners have also been applied to the literature. Shown in Appendix 1, these reports are based on information provided by the Market research agencies and publishers to be used in rationales for live briefs and circulated internally within the agencies. For example; Mindshare source research provided by Mintel and Ofcom to provide their insights to the future of mobile to be circulated internally or presented to clients. This will then be of advantage in reaching the aim of the dissertation due to it's relevancy within the industry.

This method of secondary research is then complemented with the use a selection of references was sourced from Bucks New University campus library.

Textbook and Journal based

"Libraries hold trade and production statistics, trade directories, market reports, country profiles, mail – order catalogues and other items that give a real feel of a marketplace that is not possible from viewing on – screen material"

Primary Research

“Primary data are originated by a researcher for the specific purpose of addressing the problem at hand” (Malhorta, 2010).

Inductive

The focus of the primary research to be conducted will be of an inductive nature. The approach will explore the possibilities of the role of FMCG on mobile devices to then be analysed in reflection of secondary data to conclude concepts and recommendations as a result. Primary data collected will therefore be qualitative applying the method of qualitative process in the form of face – to – face industry professional interviews.

Interview Research Approach

“The purpose of interviewing experts is to help define the marketing research problem rather than to develop a conclusive solution” (Malhotra, 2010).

Malhorta raises the following difficulties that can often arise in seeking the help of experts in the chosen field of study:

1. Some individuals who claim to be knowledgeable and are eager to participate may not really possess expertise.
2. It may be difficult to locate and obtain help from experts who are outside the client organization.

In the case of this research to be undertaken, these obstacles are likely to be irrelevant and of little concern due to the professional relationship and knowledge of each expert’s role and input towards the industry. Mobile expert James Chandler of Mindshare has supported the primary research process in recommending media owners and clients to interview in gaining a greater scope of in depth knowledge.

Face – to – face interviews

In an environment pressured for time, this presents further risk of wasting office hours. It is therefore in the interest of the industry expert to have reassurance they are the appropriate person to be interviewed, contrasting to the issues of interviews raised by Malhorta.

“This method is also helpful in situations where little information is available from other sources, as in the case of radically new products” (Malhotra, 2010). Marketers are still at the stage of experimenting with mobile technology and exploring innovative methods to engage their consumer. Interviews with industry experts will therefore unfold issues highly debated surrounding the field and provide their own perspectives and predictions.

Figure 8: Summary of benefits of Face – to – Face interviews

Advantages	Disadvantages
Highest quality results	Most expensive
Can use stimulus material	Time – consuming
Highest response rate	Clustering will occur

Success rate of Face – to Face interview relies on a number of qualities adopted by the researcher. Bradley (2010) illustrates these as; skills, attitudes, and knowledge.

“ ‘Probing’ is a technique used to clarify such situations; it attempts to motivate the informant to communicate more information without introducing bias into the questions or answers.” Marketing professionals are natural and practised public speakers. In an industry where presentation skills are key, this may mean additional skills such as probing will need to be applied in order to strength insights developed from the interviews.

John Griffiths (2010) examines the method of integrated research and the developments of online content to take advantage of. “It is very likely that content analysis will indeed become a standard tool for qualitative researchers with the help of triangulation.” It is therefore considerable to contemplate the use of primary research in this form in order to compile appropriate data to achieving the objectives.

3.0 FINDINGS

From the primary research conducted, common themes were identified throughout to then critically analyse with the relevant concepts and theories in the field in order to achieve the proposed aim and objectives of the dissertation. An overview of these themes can be found in Appendix 4.

3.1SHIFT

The most widespread theme across the scope of interviews undertaken was the phenomenal change of the consumer within the past 10 years. The term most prevalent to portray this change was the 'empowerment' of consumers: "Mobile has both caused and enabled a change in consumer behaviour" (Berney, P. 2012). Additionally, discussed in this dissertation is the need to educate clients on the fundamental attributes of the smartphone and what role it plays in the consumer's life. This is then in contrast to industry trends often focused purely on the technological functionalities. Consequently, it is necessary to first analyse the shift from the 20th to the 21st century consumer.

The Connected Individual

The move from the consumer of the mass market of a modernism culture to the individualistic postmodernism of today represents the most significant shift within society. "At a minimum, postmodernism regards important principles, methods or ideas characteristic of modern Western culture as obsolete or illegitimate" signifying the loss of power of the American government and consumers idealisation for the 'American Dream' (Cahoone, L. 1996. Pg2). Marking the end of the 20th century, postmodernism concepts were played out through popular culture and the media. 'Alessandro Mendini in 1974 commemorated the death to modernism with the 'Destruction of Lassu Chair' as the first movement to signify the loss of what was accentuated and what may arise from the ashes. The representation of 'melancholy' for the past continued to remain the focus of a society longing for a predictable culture. (Postmodern Exhibition, 2011).

Relevant to the move from modernism is Thomas Kuhn's (1962) discussion of the paradigm shift, depicting a period of time of technological and political changes. Kuhn proposed *"the history of science is thus marked by discontinuity. The* *evaluative criteria operative in one paradigm would seem logically unable to recognise the superiority of another paradigm*."

American author and Poet Shel Silverstein reinforces the case of the paradigm shift with the term 'Teserac' where "society becomes increasingly chaotic and confusing before reorganising itself in ways that no one can accurately predict or easily anticipate" (Silverstein, S. 1974). Millward Brown (2011) transports this relevant to the present day with the discussion of 'marketing in uncertain times. "Marketers tend to shift their focus from long – term strategy to short – term sales. Lessons from recent recessions provide powerful arguments for maintaining a longer – term view." While this does not necessarily support the 'chaotic' nature of the Teserac, the statement demonstrates the unpredictability the marketers face focusing on short – term sales.

To consider the paradigm shift in reflection of the themes presented from primary research suggesting changes of the consumer, it could be argued that history is repeating itself in retrospect of client's attitudes towards consumer's usage of technology. Due to the increasing rate of adoption and a history of the industry struggling to adapt to changes in the media so quickly, clients are unaware to the extent of implications of technological and political shifts on the everyday lives of their consumer. Supportive of this is in relation to mobile, Unilever Brand Manager David Titman (2012) claim "there's a real lack of awareness". The significance of this from a client perspective further suggests the education needed to indicate that these are not simply 'changes' but the result of a paradigm shift.

Developing this on the shift to a postmodern culture, Lewis & Bridger discuss The Soul of the New Consumer illustrating The Anatomy Of The Soul having emerged on the other side of the Teserac.

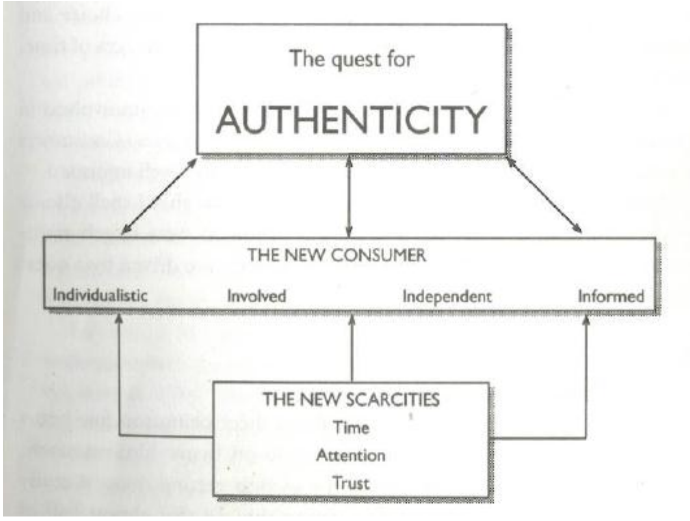


Figure 9: Anatomy Of The Soul Lewis & Bridger (2001)

- Whereas Old Consumers were beset by scarcities of cash, choice, and availability, those confronting the New Consumer are shortages of time, attention and trust.
- Whereas the Old Consumer was synchronised, usually involved in production, conformist and often woefully uninformed, New Consumers are individualistic, involved, independent and generally well informed.

In reflection of the ‘anatomy of the soul’ Dr Peter Cochrane discusses in Lewis & Bridger (2001, pg5) ‘the new scarcities of time, attention and trust’, suggesting that “there are large numbers of people who spend huge amounts of time to save money, and a small group of people who spend large amounts of money to save time.” While it is arguable that this statement is not as linear as Cochrane suggests, it is however worthconsidering the application of this in a general observation to the functionalities a smartphone now presents to the consumer in improving their everyday lives. In view of the currency of this concept, it could be argued that the relevancy of this to today’s fast evolving technology is redundant. Conversely, Lee Roberts of O2 Media (2012) states “you’ve probably heard this a million times already. You either use it to save time or kill time.” The construction of this suggestion then indicates that Roberts expected the mention of saving time and saving money in all or most the interviews undertaken. Interestingly however, out of the 8 interviews, this was focused on in only one.

Antonio Priore (2012), Business Director at Mindshare, talks of the importance in which mobile can save time for less important everyday activities "time is the most precious thing we have." This declaration then correlates to the weakened political positioning of EMEA and the consequences of this on societal attitudes illustrated in the PESTEL analysis (Appendix 7) Emerging from issues surrounding the economic climate is the realisation of how consumers actually spend time with their close networks."Mobile allows me to stay in contact with friends and keep up to date with things at work" (Messure, B, 2012).

Identified then from the PESTEL analysis and application of the paradigm shift, consumers have had to adapt to the substantial shifts in light of a weakened economy. It is distinct from the secondary research indicating the rapid adoption of technology which suggests consumers' attitudes to buying into technology differ from that of the changing buying behaviours in their other lifestyle choices. Resulting from the emergence of a weakened economic climate and with unemployment increasing year on year, consumers have had to adjust to a new lifestyle and become increasingly cautious over their spending. It is however indicated that technology is one of the few lifestyle choices in which consumers are not reducing their spending, because of the capability technology can now offer to resolve their scarcities of time, attention and trust. "Technology is essential; people aren't cutting back on their broadband at home" (Lawrie, C. 2012). This is further supported in direct relation to mobile in the knowledge that"People aren't just making calls now. So they'll be the last thing to go I think if you haven't got much money." Chandler, J. (2012).

Despite the evidence here to suggest technology is playing a fundamental role in consumer's lives, the 3% of mobile advertising expenditure and 56% smartphone ownership in the UK supports the suggestion of a paradigm shift with the lack of realisation of technological change. The consequences of this then demonstrate "to use advertising that is too far ahead of or (possibly worse) too dated for the target audience is to lose touch with them" (Goodyear, M. 1999).

It is then possible to take the view that, consequential to social media providing such transparency and the increasing ability to connect to cultures around the world; this resembles similar characteristics to the shifts which occurred at the death of modernism. Consequently, the delay is which clients are responding to the evolution technology has presented the consumer and their need be connected, further implements the necessary education in the 21st century connected consumer.

CONNECTED CONSUMER

Evidence to further support the argument of the substantial shifts resulting from scientific revolutions is the growing necessity to review previously accepted academic theory and concepts renowned as basic applications in the marketing communications industry. An example of this is Michael Porter (2011) addressing shifts in 'Rethinking Capitalism' to examine the growing relationship of shared value between business and society.

As discussed in primary research, demand from consumer's has developed from the need to remain connected to their individual networks in order to improve their daily lives and attendto the new priorities of saving time and money. To further support the argument of the shift in the 21st century consumer's priorities, an adaption of Maslow's Hierarchy Of Needs has been evaluated against primary research.

Rethinking Maslow's Hierarchy Of Needs

[Please refer to Appendix 8 to demonstrate developments of Maslow's Hierarchy Of Needs]. To directly apply this to the changing behaviour of the consumer, it is necessary to readdress the basic human needs of motivation as a result of Kuhn's paradigm shift application.

Although Mary Meeker's (2011) adaption of Maslow's Hierarchy wasproduced purelyfor discussion purposes, it raises questions as to how the mobile phone has enabled and empowered consumers in the 21st century. From the way in which Meeker has propounded her adaption of Maslow,it could be argued that human needs have become less complex, within the concept that society has become solely reliable on technology to satisfy our basic human requirements. While it is a vague execution and merely produced for discussion point, primary research has suggested the model should be adapted, as the fundamental needs of the consumer now stem from the need to be connected or 'always on' as demonstrated in the adaption in figure 10.

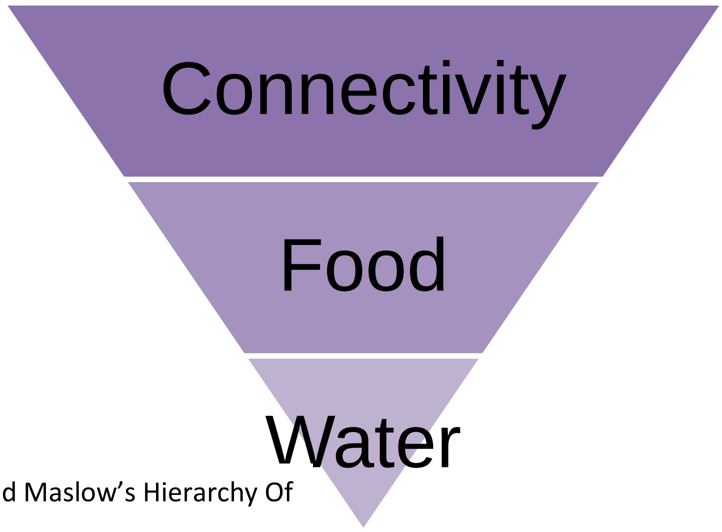


Figure 10: Adapted Maslow's Hierarchy Of Needs

On presentation of the adapted model to David Titman, his response supported the suggestion that connectivity is not solely based around the need for the technology alone, but from the desire for social networking and information that consumers now yearn. Additionally, Titman put forward "connectivity is the facilitation tool for food and water." A survey of 1,000 participants from Lightspeed Research (2010) strengthens this to suggest "it is their constant connection to their environment, their network of people they want to get hold of." With advances in the technology continuing to improve consumers' everyday lives, it could be argued that the need is to be connected to not only networks, but valuable information, news and advice, and therefore they will become solely reliant on the smartphone.

Although it may already be recognised in the industry that the consumer has become far more reliant on technology to remain connected, it is the requirement to adapt academic theory as a result of this finding that illustrates the sheer shifts in today's consumer. It is this element that could therefore prove to be most credible to clients.

Mary Goodyear(1999) examines the evolution of marketing in reflecting the role of the consumer in a post modern world. "Postmodern in the marketing sense describes the knowing cynicism of the consumer, and their growing individualism. The proliferation of media coupled with new technology enable manufacturers to customise products to ever smaller target groups." The paper then carries forward the significance of the power the consumer holds when armed with product knowledge: “they bring a new critical framework to the appraisal of brands” (Goodyear, M. 1999). This again conveys the uncertainty and unpredictability that consumer’s demonstrate in their revolutionised purchase decisions and modified behaviours as a result of the role the smartphone is now playing in this process. As access to product knowledge through increasing new mediums empowers the consumer, the level of cynical attitudes towards a brand will continue to overwhelm those organisations that fail to adapt to the shifts identified.

To carry this forward, Pringle & Marsh’s media flow (2010) should be examined in response to the paradigm shift and guide towards the objective in examining the role of the 21st century consumer and their own usage of the smartphone.

3.2Mobile Identity

“Perception that what you can do on mobile is limited because it costs slightly more to do it and the numbers you can reach are smaller” Titman, D. (2012). Presented in this section however, is the uniqueness of the smartphone that offers the ability to deliver a mirrored brand message tailored to smaller, more relevant segments.

A universal theme throughout the primary research was the ability of the smartphone to deliver relevant messages, at a relevant time and place, to a relevant audience having developed on the rise of the consumer as an individual.

Gordon & Valentine (2000) first discuss this in their examination of the 21st century consumer, exemplifying the need for brands to create ‘the moment of identity’ by means of sifting through the noise of competition of increasing media exposures. Grasping the concept of communications as a world of mirrors, these are then represented as brand ‘touchpoints’ recognised by the consumer in the build to create a ‘moment of identity’. An example of this is the sensory stimuli which supermarkets create with the use of particular scents to stimulate desire to purchase.

Developing on this in a more recent research is the study of Cloud Thinking by Sue Elms of Millward Brown (2011). “In that moment of contact, it is indeed the only piece. Proximity to relevant moments and places becomes the driving factor.” As a consequence of the mobile being “at arm’s reach 24/7” (Clumisky, N. 2012) the smartphone now offers the opportunity to create a ‘moment of identity’ in the mix of other forms of communications and assets of the business. .

The IPA TouchPoints studies begin to attempt to understand these moments investigating consumer’s media consumption by day part. Pringle & Marsh (2010) however, developed the media flow, having recognised a fundamental flaw in the study.

Pringle & Marsh

Pringle indicates that “TouchPoints results are highly complex due to the fact that today’s consumers drift in and out of media consumption each day.” The media flow was then developed in order to demonstrate the developments of media options which have evolved from the Industrial Revolution of the 19th century to the digital era of the present day.

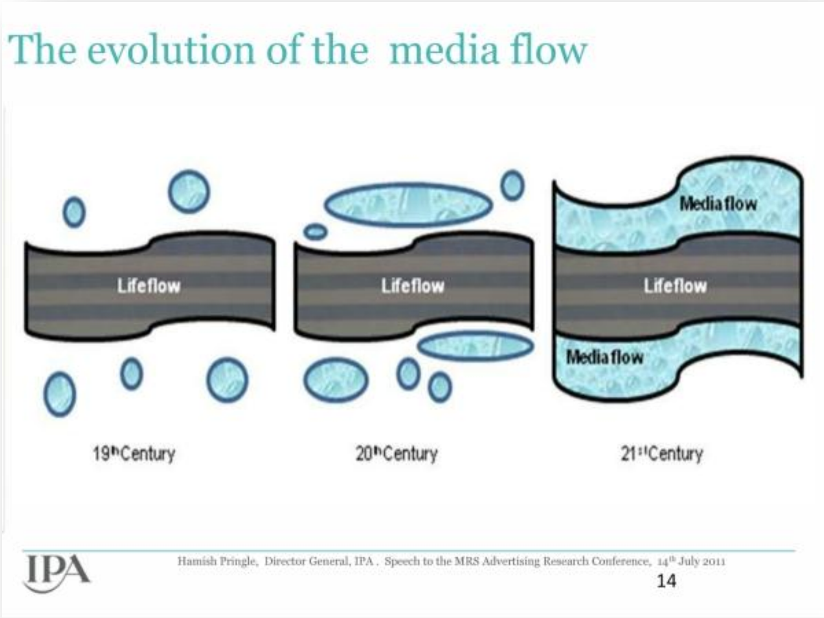


Figure 11: Pringle & Marsh 'The Media Flow' (2011)

The 'media flow' provides a strong case to support the argument in the development of Maslow's hierarchy, illustrating the 'connected individual' in addition to the need for creating the moment of identity. While the model identifies that life flow and media flow are now parallel, it fails to recognise the complexity of technological advances that are now affecting the business in its entirety through behaviours such as multichannel consumers and the unpredicted growth of the smartphone. Where consumers in the 20th century had minimal technological advances to enhance their daily communication, today's online communication has overtaken the need for offline conversation developing an intertwining .The life flow versus the media flow of the 21st century continues to convey a linear approach, and should therefore now consider recognising the growth of the internet enabled smartphone. (Figure 12).

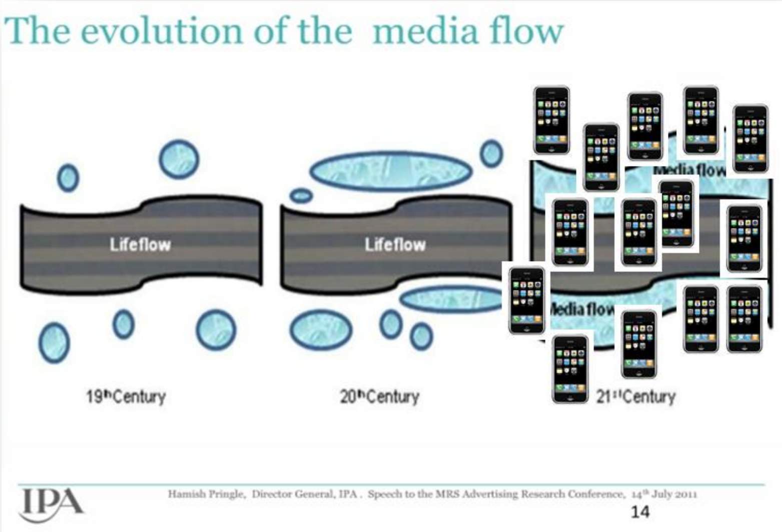


Figure 12: Adapted Media Flow

The adaption demonstrates the role of the mobile in the consumer's life, and leads to the examination that mobile now accounts for a significant amount of everyday actions which until now have been predominantly offline activities. Furthermore, it could be argued that with the extended growth of the smartphone, social interactions are now sometimes viewed as interruptions to 'communication'. Disagreeing, David Titman asserts "I don't necessarily view them as interruptions. Some of them are just rude." However, Titman continues to put forward "I would completely agree with that" in relation to the consumers' need for connectivity overhauling particular aspects of life flow.

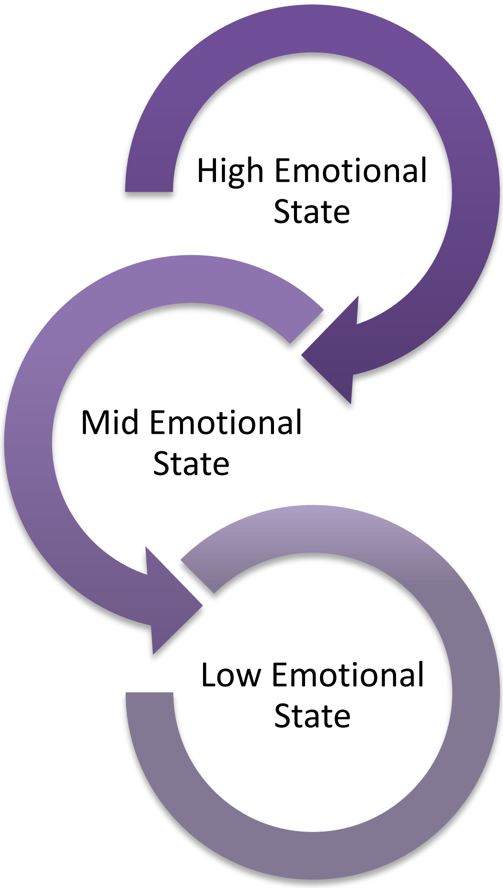
The combination of the adapted models of both Maslow &Pringle could then be reinforced by further research to examine mobile consumers' attitudes towards being unconnected. "People are increasingly uneasy if they feel out of reach, unconnected andunsettledif they are apart from their mobile device" IAB (2008). The mobile landscape has seen phenomenal enhancements since the publication of this interpretation and could therefore produce remarkable results from further investigation of the opportunities the mobile phone offers. With such fast paced developments in the field then, brands would benefit from new ways of thinking about planning on the mobile platform.

<u>MOBILE MOMENT OF IDENTITY'</u>(Please see appendix 9)

"We need to be inspired by changing consumer behaviours and needs to think differently about how brands can best add value in the mobile environment." Advertising Research Foundation (2010).

Adapted from the Gordon & Valentine concept of the 'moment of identity,' mobile now provides the opportunity that no other medium has had the capability to achieve. The 'mobile moment of identity' has been developed here, simply by emphasising the ability to reach these moments at all or most points of the day, in a new approach to planning. Reflected is an indication to the mood states into which consumer's relationships with particular mobile trends could fall, represented by high, mid and low emotional state.

Figure 13: Mobile Moment Of Identity Adapted from Gordon & Valentine (0000)



Illustrated by this model is a new way to think about planning on the mobile platform. The concept attempts to grasp the complexity of the medium and its constantly evolving nature. In doing so, emotional states are considered to underpin the responsiveness of the consumer, in contrast to focusing on the idea of a trend. This then deliberates on Sir John Hegarty's statement, that the industry is "focusing on the technology instead of what its offering," by communicating through a moment in time, using the mobile platform as opposed to the technology in which to reach the consumer.

Consequential of the examined media flow and connected individual, it is then possible to consider a viable definition of mobile advertising, a need raised from research of the ARF (2010).

MOBILE ADVERTISING DEFINED

Raised by research from the Advertising Research Foundation (2010), to fully understand the benefits of mobile advertising, a clear definition should be investigated. Also acknowledged by Advertising legend Sir John Hegarty "we are over, over obsessed with the technology, not what it's actually offering."

Whilst this was examined in the primary research undertaken, it became clear that due to the changing nature of the device, a definition of 'mobile advertising' would prove complex to commit to on an industry level. "Mobile advertising is growing all the time." Berney, P. (2012). To begin defining the term, the following have been considered from both primary and secondary research. Now Head of Mobile at Mindshare, James Chandler defines mobile advertising separate to mobile marketing, stating that;

"*Mobile advertising is very much something that's on the device that you do and then mobile marketing links it into the real world."*

"Mobile advertising for me is any platform that uses any mobile device to engage the consumer"

Lee Roberts, O2 Media

"*Ability to target particular people in particular locations"*

David Titman, Unilever

Perhaps the most overviewed definition comes from Mobile Marketing Associationto suggest;

"*Marketing through the Mobile Channel, "Mobile Marketing," consists of a unique, complex, mix of technologies, business skills, and marketing expertise*."

Although it was made clear throughout the interviews conducted that mobile is constantly changing and therefore may be difficult to define, the definitions presented here are argued to work towards defining what the smartphone offers. Chandler proposes the differentiation between mobile marketing and mobile advertising presenting this as acquisitions rather than passive exposure. Roberts' proposal of mobile advertising could relate broadly to that of the smartphone or similarly tablet devices and so directly applied to this research would not necessarily benefit in investigating what the mobile phone offers and more applicable to the technology itself. Contrastingly is Titman's sole focus on what mobile offers with the absence of any mention of the technology. To combine these definitions to begin understanding and educating the opportunities on mobile, the statements below have been constructed as a result of these findings. Due to the complexities of the communications landscape, it is then necessary to differentiate the definitions of 'mobile marketing' and 'mobile advertising' reflective of the 'moment' the platform offers the advertisers to communicate through.

"Mobile Advertising is a channel with the ability to reach a particular person in particular locations at a particular moment."

3.3 WHAT DOES IT MEAN FOR ADVERTISING?

Addressed in answering the objectives to investigate the role of the 21st Century consumer and their ownership and usage of the smartphone, this raises awareness of the fundamental shifts that have taken place within society since the phenomenal growth of the smartphone. The evolving need to review academic theories designed prior to such substantial technological and political developments now requires, as a consequence, the ability to think and plan in a new way of thinking with mobile.

During the conduction of this research, it was reported by the IAB that mobile advertising spend had increased by 157% since 2011. However, this still only accounts for 3% of the overall advertising budget. Ashley Highfield of Microsoft speaking at the IAB Mobile Engage conference in 2011 suggested that “there is still a lag behind the reality” in reference to consumers ownership of the smartphone and the amount of advertisers moving into the space. Contrastingly however, research conducted by Mindshare (2011) after the Mobile Engage on ‘The Future Of Mobile’ were seen to contradict Ashley Highfield’s claim, expressing “many smartphone users are not as sophisticated with LBAs as we might think. Sometimes we find ourselves in a marketing/media bubble.” Additionally Lee Roberts (2012) contributes “I think with mobile, it’s still quite slow”. This then led the research to investigate the discontinuity behind the figures in order to understand the obstacles that currently face the advertiser implementing a mobile strategy.

Obstacles

Raised by the primary research were the issues and concerns the industry must overcome in order to affirm mobile as a valuable part of the marketing mix for FMCG brands. Common themes presented were obstacles such as the infrastructures of mobile payments, and data concerns.

“As long as it’s handled in a sensitive and using it in the right way then that’s not going to be an issue.” Lee Roberts (2012).

Further review of these points however indicated them to be insignificant issues and concerns to address in this analysis, as these will decrease as the technology develops. Although these remain important steps to consider for the future of the mobile platform, it is the wider contextual issues of the industry, such as educating clients and the implications of societal shifts, that need further development, in order to lead the way to uncovering a role and relevance for FMCG brands within the dynamic mobile ecosystem.

Measurement

"They don't understand how digital could benefit their market share. They don't have the proof" Antonio Priore

"Mobile remains complicated by buy, particularly mobile advertising. It lacks all measurement that the marketplace might want" Paul Berney

"I think they're scared to invest in the unknown" Becky Messure

Given the lack of standardised buying and measurement methods, it could be argued that this has been the reason behind the focus on the opportunity or technological trends rather than on the relevancy and interaction consumers could have with mobile advertising. This lack of measurement on an industry scale however, can be resolved through enhanced client education that promotes better recognition and understanding of how mobile could work towards create a 'moment of identity' that is relevant to both consumer and the brand.

Education

"People deciding where to spend the money are older marketing managers who haven't grown up with the technology" Titman, D. (2012)

"*Educate advertisers and consumer*" Antonio Priore

"More of a big education job than anything" Becky Messure

Interestingly, the primary research identified disconnects between the trade body represented by Paul Berney and Unilever client David Titman. In contrast, an overview of agencies and media owners revealed similar attitudes to each other towards the opportunities that mobile offers the FMCG advertiser.

A significant disconnect between the two participants was the consumers' attitude to the individual characteristics of the smartphone. Paul Berney indicates "we feel differently about mobile than we do about other channels.” He then continues comparing the likes of e-marketing and push messages on the mobile phone to express “within a week you would be phoning your operator to say ‘make it stop’ ”. This aspect was further demonstrated by James Chandler to advocate “because it’s so personal people don’t necessarily want brands talking to them.” Contrastingly, Titman suggests “I think they’re a bit more open to it because it’s so personal”.

Additionally, a significant statistic revealed in these two interviews was the number of times consumers unconsciously check their mobile phone throughout the day. Where Paul Berney acknowledged this as 80 times a day, David Titman indicated a significantly lower answer of 35. This provides evidence for a heavier reliance on the relevancy of what the mobile phone offers consequential of the shifts presented in the research, in contrast to the opportunity, which is often misleading as a result of the increasing number of statistics used to educate clients.

The opportunities for FMCG brands that have been revealed from the research carried out for this dissertation should then be advised to clients addressing the discontinuity of mobile advertising expenditure.

Opportunities for FMCG

Discovered from the previous section illustrating the media flow, the combination of Daniel Kahneman’s System theory (2011)raises the potential for FMCG to benefit most out of the mobile platform. The Systems theory presents the observation that 99% of the human decision making process is unconscious and the remaining 1% as conscious brain activity. It is this 99% that low involvement purchases sit within the consumer’s shelf space in their mind. Kahnemanstates typical characteristics of this process as automatic, unconscious, emotional, associations. With the focus of mobile to advocate simplistic and a “seamless experience” (Lawrie, C. 2012) FMCG brands should view the low involvement buying process to their advantage on the mobile platform.

A consistent case study throughout the interviews conducted was the Lynx Fallen Angels campaign.Lynx acquired a highly engaging platform in a very typical tone for the brand relevant to the consumer and for this reason was able to experiment in such an innovative and creative plan. Although executed well and exceeding expectations, concerns were raised over the measurement of promotional activity having directed consumers into store. It is brands with an audience of an older demographic that face all the more testing and understanding of the role mobile plays in their consumer's life to communicate through the device.

Referring back to Sir John Hegarty's claim, a stigma has been attached to mobile that branding and promotional activity may appear as intrusive on such a personal device. As previously discussed, this is crucial to consider, however the expectation does not necessarily lie within innovative technologies such as augmented reality. Becky Messure (2012) presents the humble view that "It would be nice to see brands getting the basics right." To put this into context of the mobile consumer, Messure's statement defies the stigma of intrusiveness and presents the view that brands should at least provide a minimal service through the platform. Again, to enable brands to get to this stage, it is the education of the wider context to deliver the basic testing and analysis capabilities.

Truth

In relation to the anatomy of the soul concept, 'trust' is a major issue which advertising often struggles to gain from the consumer, due to a self-inflicted history of misleading communication in the birthing from the 'golden age.' The industry itself has improved this substantially, as a result of shifts in society as a consequence of the postmodern movement in the 1980's. It is evident from this analysis however, that the industry have not yet adapted to the transparency of brands as a result of the shifts in communication of the digital era. It is therefore necessary for brands to react to such sizeable shifts within society by maintaining relevancy amongst their consumer.

As examined in this paper, the concept of 'truth' in advertising dates back to Bill Bernbach in the 1960's, famously stating "I've got a great gimmick, let's tell the truth." Furthermore, research conducted by the ASA (2002) on consumer's attitudes to advertising demonstrates a need for the industry to respond to this as the gateway to a lasting relationship with their consumer. It is interesting to note the apparent lack of completion and follow-up of a more recent study by the ASA on consumers' attitudes to advertising that was due to be published in 2012. Encouragement for this issue concerning today's connectivity driven society is provided by Sue Unerman and Jonathan Baskin's (2012) most recent publication of 'Tell The Truth'. Arguments articulated in the literature indicate the growing transparency of a brand to the extent to which the consumer has become ever smarter than the Brand Manager with the ability to source information in seconds with the facilities of a Smartphone. "The consumer essentially has greater power than any brand manager" (Unerman, S. 2012).

Should the truth be told?

"*I couldn't agree more"* David Titman Brand Manager of Unilever.

The consequences of smartphone penetration have ultimately transformed not only the marketing communications industry, but also the manner in which organisations behave in the public eye. To demonstrate the major impact this has had on brands, examples can be found in recent case studies from The News Of The World, RBS and BP to the widespread crises of public confidence, which in one case ultimately resulted in the demise of The News Of The World.

Should the brand underperform from a business perspective, consumers are now empowered to broadcast these negative brand experiences through social media. With the unexpectedly rapid growth of the smartphone, this further highlights the increasing consumer access to social media, sharing information with their community of networks within a matter of seconds. The line then becomes blurred on the issue to distinguishing the core business from the communications problem, which ultimately increases the pressure on the agency to perform. It is however crucial for the agency to identify the true business problem, and only then produce communication plans as a result of solving the problem. Brands can no longer sweep business problems under the marketing communications rug. Agencies need to be brave, honest and open to adapt to the transparency brands are now facing.

Demonstrated in Appendix 11 is the explanation of the new role for agencies to consider. Where the transparency of a brand through consumer's connectivity has been viewed as obstacles, the model presents the potential to combine transparency and the mobile platform together. With further research required, the model presents the matter that client education of the connected individual resulting from the growth of mobile, widens opportunities for brands to ingrain the truth at the heart of their brand.

“Clients can either be the enabler of a new channel or the barrier to it” (Berney, P. 2012). While this relates primarily to the lack of education in mobile opportunities, this also places the focus on the wider implications that result from the business problem, often disguised as a marketing communications problem. “Businesses are not investing in trying to figure out what they’ve done wrong. That’s not an accident. They don’t want to know”Kahneman, D. (2011). As this problem is becoming increasingly visible through social media, and further highlighted by consumer’s usage of the smartphone, it is the agency’s responsibility to guide their clients down this route, thus enabling the business issues and communications to collaborate in effectiveness. Truth then reflects not only communication to the consumer through the brand, but also the relationship agencies have with their clients to advise honestly, to distinguish the matter as a communication problem, or the wider areas of the business. Agencies that take on this approach will benefit from enhanced brand delivery and begin to move towards a new role as their clients business partners.

With the potential impact of marketing communications on the organisation in its entirety, this presents an opportunity for the agency to advise their client on all areas of the business, as both experts in their primary area of expertise and as business partners.

4.0 CONCLUSIONS

Relevant moments

Relevancy then relies on the ‘moment’ the advertiser chooses to engage the consumer. With the ability of location – based services and FMCG buying decisions typical of habitual or impulse behaviours, a clear indication is that FMCG are likely to benefit most from a presence in the mobile ecosystem. Due to the personal characteristics and attitudes towards the mobile however, the level of intrusiveness correlating with the particular technique to be used should be of high priority to further investigate. Conclusions and recommendations set out in this section should then contribute towards FMCG brands exploring the mobile space with consideration for both the consumer and the wider business contextual issues.

The dissertation concludes to acknowledge the paradigm shift which significantly changes the way society communicates as a result of the digital landscape, further enhanced through the considerable growth of the smartphone. Consequently, the need has been applied to review existing traditional models in business and communication.

Due to the fast pace in which technology of the mobile phone develops, clients should be educated as to what the smartphone offers by means of communicating with the consumer in contrast to sole focus on the technology. With this though, agencies would implement new thinking to address the changing nature of both the consumer and the smartphone. The following conclusions then provide methods in which to confront the discontinuity between ownership in the UK and mobile advertising spend with the aim to implement FMCG brands to the mobile platform.

The Connected Individual

With the pace of the technology constantly evolving, this further complicates the purpose in educating clients in the opportunities of the mobile platform relevant to their brand. The research identified here however, addresses the underlying implications within society as a result of the advancing technology and underpins the evidence behind consumers' aspirations towards the smartphone.

Addressing the wider implications for brands at a time of a turbulent paradigm shift, the problem remains of how to steer through the media flow as a direct result of consumer change and emerging new behaviours of media consumption. Mobile however, presents the ability to remain with the consumer throughout all varying mood states of the day and at each point of the media flow. As adoption of the medium expands, implementing mobile into the media plan should become an integral ingredient in brands communication with their consumerthrough a combination of touch points in the 'moment of identity' relevant to the brand.

New Way Of Thinking, New Way Of Planning

Examination of the media flow has concluded that where Pringle & Marsh constructed the media flow to sit parallel alongside life flow, this is a linear view to that of the connected 21st century consumer. The media flow and life flow intertwine as a direct result of the medium at arm's reach of the consumer throughout their day to day lives.

Developed from the research is the significance of consumers contrasting attitudes towards the smartphone in comparison to any other medium. Combined with shifts within society, advertisers should similarly think differently about the mobile platform for branding and promotional purposes. The proposed model takes into consideration the intrusiveness of a particular trend versus the emotion in which the advertisers aims to communicate the consumer in the 'moment of identity.' With this, multichannel media can then be implemented to enhance the brand experience and prevent the possibility of a negative impact through the personal device.

As discovered from the analysis from primary research critically examined against Pringle & Marsh's media flow, mobile has the potential to connect consumers to a brand, bridging the gap between traditional media and innovative touch points. In such contrast and ability to any other technology before, mobile advertising should then be measured in complimentary methods as part of an integrated strategy.

It remains unproven for standardised methods of measurement resulting in brands relying on existing methods to prove effectiveness. As demonstrated throughout the research, mobile is unique to the marketing mix and explores areas of engagement that no other medium can benefit. Therefore, traditional methods of measurement must then subsequently provide minimal evidence.

The New Role Of 'The Agency'

"Reality for a lot of agencies if they don't make much money from mobile, they can be at time reluctant to recommend it."Berney.P 2012. The concept of the truth however, supports the recommendation that agencies should be developing a vital new role to advise and educate clients on the fundamental shifts of the consumer thathave resultedfrom the adoption of the smartphone. Where brands are now heavily relying on earned media to drive the desired outcome of their communications "the Brand Manager is effectively dead.We will become more like conversation managers" (Titman, D. 2012).This therefore presents the emerged requirement to adopt truthful brand communications, with the agencyto advise clients in relation to the newly interwoven relationship of core business and communications.

5.0 RECOMMENDATIONS

Stop lagging behind

Evident as far back as the ‘golden age’ of advertising, the industry continues to lag behind the fast pace of today’s consumer. The rate of adoption has soared as a result of the capabilities of the technology, in saving consumers time and money relative to their place within society. It is a medium felt differently to any other communications technology previously owned by the consumer, as a result of the unique personal qualities the smartphone imitates and solving their everyday scarcities.

It is not suggested here that brands should rush precariously onto the platform simply for the sake of an existence. However, brands which fail to implement the minimum stage of a mobile optimised site and traffic driving methods for experimentation purposes will experience the full negative impact of delay in implementing this proposed innovative approach to an enhanced mobilised strategy.

It is essential to highlight that this is a concept which brands should not be hesitant in adopting. Rather, it is an evolutionary step forward in adapting to the fundamental shifts in culture and society that have emerged and recognised in the context and findings of this research. The conclusions offered provide a template for an innovative response from the agencies that will be best positioned to succeed in the new mobile business environment.

Client’s consumer education

There is a perceived need to improve and develop clients’ understanding and awareness of the opportunities of mobile, to reaffirm how the consumer has shifted from the mass market of the 20th century to the new individualistic market, enhanced by the possession of a smartphone. This is more prevalent now as a result of the shifting societal and cultural changes evident from the growing rate of adoption, and the familiarities to that of the paradigm shifts from modernism to a postmodernism world. Furthermore, this has resulted in the need to adapt previous models, as presented in this research, which should therefore provide justifiable acceptance of the wider contextual issues applicable to the growth of the smartphone.

'Mobile Identity'

This will be the most ubiquitous opportunity for the FMCG sector due to such low involvement in the buying decision and the need to remain innovative to communicate with the consumer's shelf space in the mind.

The intention of the model is to provide a guide to an enhanced method of planning in the ability to test smaller more relevant segments through the moment of identity. The model will then only appeal to those agencies and clients willing to become innovative and experiment in communicating through the mobile channel. Adopting the view of the mobile moment of identity then aims to provide a step forward in the planning process for mobile with a model compliant of its evolving nature. 'Mobile Identity' takes this into consideration in allowing for adaption in accordance to the brand, the objectives to be achieved and emerging technology trends.

Truth

Due to the complexity of brand building in the 21st century in comparison to the 'golden age of advertising,' brands and their agencies are in high demand to maintain consistency and produce creative content to build long – lasting relationships with the consumer. Cementing the truth throughout the core of the brand will allow for consistency and respectful relationships with the consumer in the difficult times that lay ahead for EMEA. While BRIC countries have the advantage of a strong economic outlook, EMEA longs for innovation and creativity to survive substantial shifts both consumers and businesses face for the foreseeable future. This then calls for agencies to implement truthful advertising at the heart of the brand as well their relationship with the client to enable to the best possible brand delivery.

Further Research

The research presents a number of areas that may be investigated to develop the findings presented in this dissertation. In the field of neuroscience, examining the mood states of the proposed mobile identity could prove invaluable to agencies focusing on communicating with the consumer in a particular 'moment' through the mobile platform. Developments are also recommended to investigate the implications of digital communications on the English language as a semiotic study.

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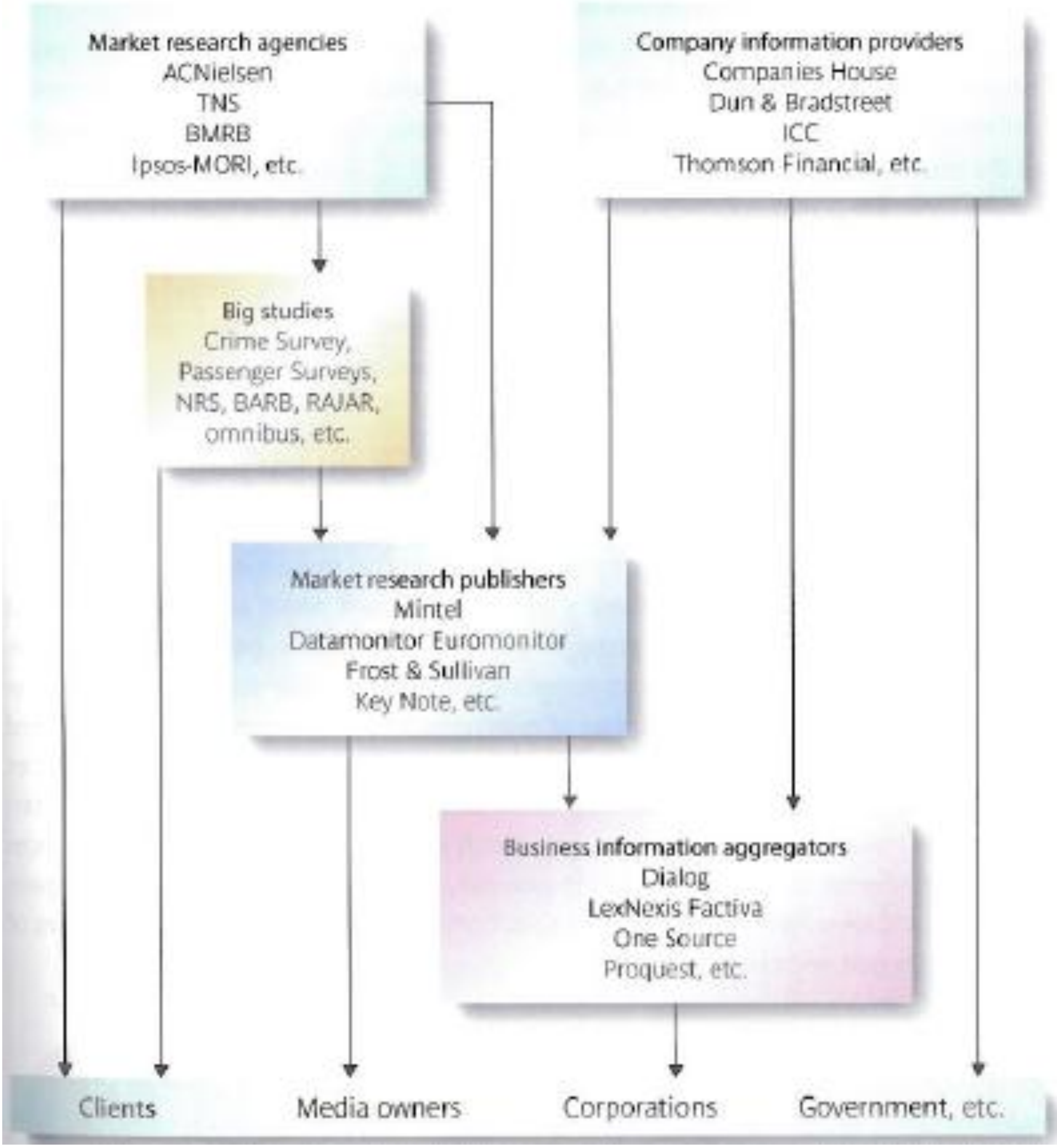
Appendix1 - The Complex desk research market



Appendix 2 - Ethical Guidelines adhered to

1	Personal data shall be processed fairly and lawfully
2	Personal data shall be obtained only for one or more specific and lawful purposes, and shall not be further processed in any manner incompatible with that purpose of those purposes
3	Personal data shall be adequate, relevant, and not excessive in relation to the purpose or purposes for which they are processed
4	Personal data shall be accurate and, where necessary, kept up to date
5	Personal data processed for any purpose or purposes shall not be kept longer than is necessary for that purpose of those purposes
6	Personal data shall be processed in accordance with the rights of data subjects under this act
7	Appropriate technical and organisational measures shall be taken against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data
8	Personal data shall not be transferred to a country or territory outside the European Economic Area (EEA), unless that country or territory ensures an adequate level of protection for the rights and freedoms of data subjects in relation to the processing of personal data

Appendix 3 - Confidentiality

It was necessary to bear in mind the professional roles in which each participant are employed. Due to the nature of the media business, it was considered that interviews with particular participants may attain a biased view. For example, with the involvement from media agency Mindshare, interviews with media owners Google and O2 would naturally produce results lenient towards the selling aspect of their business as a direct influence from their day to day roles selling media space to the agency. In particular, as Google are acclaimed in the industry as ‘The Frenemy,’ it is worthy to consider that results from this interview would be restricted coherent with the confidentiality of future strategies.

In contrast, the interview with the trade body, Paul Berney of The MMA was likely to contain a more neutral view as their role in the media overlooks the best practice on an industry wide perspective. “*The MMA's primary focus is to establish mobile as an indispensible part of the marketing mix. The MMA works to promote, educate measure, guide and protect the mobile marketing industry worldwide.” (www.mmaglobal.com, 2012).*

Confidentiality respective of each profession and organisation was also taken into careful consideration. All participants confirmed the usage of their name, job title and organisation to be used in the research. During the research period, Leo Burnett expressed interest in the conduction of the dissertation. It was felt however, that due to contributions with a conflicting agency and clients in the FMCG sector, involvement with Leo Burnett may compromise the depth and quality of findings from the primary research designed with Mindshare and Unilever.

Appendix 4 - Cloud of interview findings

Appendix 5 - Interviewees

Interview 1- Transcribed	
Name: James Chandler – now Head Of Mobile at Mindshare	**Date:** 23rd January 2012
Sex: Male	**Length of interview: 25 mins**
Organisation: Mindshare	**Method:** Face to face interview
Position at time of interview: Account Director of Mobile	**Location:** Mindshare, Centre Saint Giles, London, WC2H 8AR

Interview 2	
Name: Antonio Priore	**Date:** 23rd January 2012
Sex: Male	**Length of interview: 30 mins**
Organisation: Mindshare	**Method:** Face to face interview
Position at time of interview: Business Director	**Location:** Mindshare, Centre Saint Giles, London, WC2H 8AR

Interview 3	
Name: Lee Roberts	**Date:** 23rd January 2012
Sex: Male	**Length of interview: 25 mins**
Organisation: O2 Media	**Method:** Face to face interview
Position at time of interview:	**Location:** Mindshare, Centre Saint Giles, London, WC2H 8AR

Interview 4	
Name: Craig Lawrie	**Date: 25th January 2012**
Sex: Male	**Length of interview: 25 mins**
Organisation: INITIALS Marketing	**Method:** Face to face interview
Position at time of interview:	**Location:** INITIALS Marketing, Lower Regent Street, London

Interview 5	
Name: NicClumisky	**Date: 2nd February 2012**
Sex: Male	**Length of interview: 30 mins**
Organisation: Google	**Method:** Face to face interview
Position at time of interview:	**Location:** Google, Centre Saint Giles, London, WC2H 8AR

Interview 6	
Name: Becky Messure	**Date: 15th March 2012**
Sex: Female	**Length of interview: 25 mins**
Organisation: Mindshare	**Method:** Face to face interview
Position at time of interview: Account Director and Mobile Specialist	**Location:** Mindshare, Centre Saint Giles, London, WC2H 8AR

Interview 7	
Name: Paul Berney	**Date: 9th February 2012**
Sex: Male	**Length of interview: 35 mins**
Organisation: Mobile Marketing Association (MMA)	**Method:** Face to face interview
Position at time of interview: CMO & Managing Director	**Location:** Mindshare, Centre Saint Giles, London, WC2H 8AR

Interview 8	
Name: David Titman	**Date: 26th April 2012**
Sex: Male	**Length of interview: 35 mins**
Organisation: Unilever	**Method:** Face to face interview
Position at time of interview: Brand Manager of Household Cleaning Products at Unilever	**Location:** Mindshare, Centre Saint Giles, London, WC2H 8AR

Appendix 6 - Interview 1: James Chandler interview

How do you think we should define mobile advertising?

I think we look at it in two ways, there's the pure advertising stuff which is what people have been used to be doing online but smaller I guess, and a bit more immersive on a small screen so that can include display banners, search all those kinds of things, messaging, proximity messaging. And then I think there's what we define as mobile marketing which is the wider role for mobile which might be point of sale, looking at CRM or tying it into loyalty and things like that so slightly separate and I suppose mobile advertising is very much something that's kind of on the device that you do and then mobile marketing kind of links it into the real world, physical purchases and stuff like that.

There's a lot of research into consumer behaviours and it's becoming increasingly important but how do you think the role of the consumers changed within the last ten years?

I think if you ask me a question now I could take a phone out of my pocket and in 30 seconds I could have the answer for you which would never have been able to do before so, that's kind of fundamentally changed I think, the way we think about things. So, the fact that if I'm shopping now I don't need to remember a paper map or ask someone or guess and get it wrong. I can pinpoint myself and then within 10 seconds I can find somewhere, I can use my phone as I'm going into a shop to look at prices, I can compare it with other things, I can look at competitor products, so I think fundamentally the fact that you can do all those things on the move now just completely changed the way that we behave around it and there's a bit of Google research that says 70 something per cent of people don't sleep or are ever out of arms reach of their mobile phone and so it's absolutely changed the way we're doing things and we are starting to go into this post – PC era now where PC's would be great for your music production, and PowerPoint slides and all those kind of heavy lifting things but for kind of pure browsing and quite productivity focused stuff then absolutely we would be using mobile phones instead.

There’s a lot of stress in store shopping for retail say Tesco, mums can find it quite stressful, do you think that reflects online and mobile shopping for groceries as well?

I think online’ s got that ease of, and the new Tesco ad does it kind of brilliantly where you can literally just sit back, do it at will, it gets delivered, it’s all very easy. But I still think people will crave this want to go and touch things and pick things up. Fruit and veg and stuff is the ultimate thing that home delivery always seem to get it wrong. There’s also a sense of control as well, as much as Tesco can kind of guide you round their brand site or their mobile site, it’s not quite like that experience of going into a store where there pumping fresh bakery smells through when you come in it’s all very co - ordinated as to kind of how it leads you round the store. So, mobile trying to find a role within that very controlled environment, certainly from the research that we’ve done is proving very tough unless you are either the retailer, a Tesco or something like that, or you are a leading brand and so in paint it might be someone like Dulux, in petrol it might be someone like BP. So, if you’re what we’re calling a beacon brand in that environment, then potentially you might be able to influence people, but it’s really the role of the retailers of how they use mobile in store.

What extent do you believe that FMCG’s are reliant on mobile penetration and the generations that are using mobile?

So, I think brands like Lynx and Impulse and a lot of the ice cream brands that we look after within Unilever will absolutely and should exploit it. There’s been some really good work that we’ve seen. But the harder challenge are things like bleach and household products and that slightly older demographic as well. But we saw some research this morning from I think it’s a joint from the IAB and someone else, I’ll find out for you. That is basically saying that as much as the e – commerce buyer has got older they will start to see it on mobile as well. As we know, everything seems to happen a lot quicker on mobile. So, yeah I would anticipate that people will get there. 49% of this people in this country have got a Smartphone now 51% still haven’t but clearly that adoption curve is growing and growing and growing and as price of handsets come down, flat data charges so no one’s worrying about what they’re paying and the people that haven’t got that Smartphone the next phone they will buy will absolutely be one. So, I think once we remove those barriers and people feel more at home with playing on these devices, then I think they'll become more and more useful for more people in more places.

Do you think that also relies on the government putting money into bringing out 7G eventually?
Yeah, so I think that's one as well. We saw a really interesting debate with Ed Vacey? Who's the guy, I'll look him up actually but he does all the media related stuff and yeah the 4G thing is going to be huge in terms of who gets what but yeah it's either going to be 4G or its going to be we accept free wi – fi as standard now. Brands like Topshop around Christmas have said 'yeah we'll give you free wi-fi because they literally can't come down in prices so, looking to add value in different ways and with something that's in your pocket all the time it's probably quite a good way of doing it.

Would you say though in the economic downturn that there might be a lot of restrictions there prioritising things like healthcare and education over technology?
Yeah, I think this is the one bit that falls outside of it though. I think, tablets and Xbox's and big Apple Mac computers might be the things that go, your big screen telly. Everyone needs a phone because people aren't just making calls now, people who have diabetes can punch into the app when they need to have insulin, we are a nation addicted to Smartphone's I think the Guardian said and we'll become even more reliant on them. The plans for O2 over the next 10 years and their health product will be that your phone knows all the movements you make through the data that tracks you when you go off those movements and you don't make those movements and those activities, it will sense and it will alert you that something is potentially wrong because you're not going through the same routine. So, we absolutely need phones, so they'll be the last thing to go I think if you haven't got much money. Hopefully, otherwise we're out of a job.
There's a lot of psychological fears around data and security, do you think consumers will ever be able to rid of that fear at all?

I think we thought that with online as well and I kind of think you get round it. There is always going to be someone who breaks it, someone who hacks it, the nature of technology means that the people that are hacking it are as good as the people making it. So, invariably there will be something where the privacy debate comes to ahead I don't think any more so than something like chip and pin where the government had to go away and create a cheesy TV ad with two characters and explain to everyone that it was going to be ok, and you wouldn't think twice about chip and pin now. Everyone was worried about old people wouldn't be able to use it, well old people can't hold a pen very well and sign their name. So, yeah I think there will be, especially around mobile payments, I think there will be some resistance to it at the start but if you go on that adoption curve I think people will pick it up. Mobile in general, I think flat data plans so unlimited data will be the thing that unlocks it. If you know that when you hit that button, you don't have to worry about how much it going to cost, then you're more likely to play more, check in more and browse using your phone more. When you've still got that ceiling where you think 'oh am I going to go over or not' then you're less likely to get involved with it. So I think, flat data charges across the board would really change it, but I don't know if we've got the capacity to do it.

Do you think that easability of payment though would scare consumers a bit, to spend so much money?
In terms of using your phone to pay for stuff? Yeah, I think probably at the moment. I think the next 12 – 24 months will be more interesting as we get to the end with things like the mobile wallet and NFC will become a bit more common place. But I think the IAB said that the average amount bought on a mobile phone is just under £18 so it's still not huge. You can still go into MacDonalds if you've got an NCF enabled phone and buy something for under £15. So, the real role for mobile at the moment is low cost purchases I think. There are people buying cars and sofas and you hear all these stories, but I think the majority of people, it's low cost and it's an ease thing more than anything I think.

Mobile hits it peak between 7 and 10 pm, do you think FMCG can benefit from payments at that time or would it be more exposure?

I guess it’s their own shopping habits. I definitely think in general FMCG will benefit more than anyone else in terms of mobile because, you take KitKat, that’s part of Nestle, they’re all about impulse purchase. You don’t wake up in the morning and think, ‘I’m going to buy a Kit Kat today’ it’s all about in that moment, ‘right I need a Kit Kat’ and if it’s really easy to do something on your phone then I think there’s a role for it there. Similarly, it’s targeting people, like time targeting through search or whatever other advertising, mobile advertising you’re doing and getting a message to those people when they’re in that need state of ‘I want something.’ It’s the same if you want a plumber, and you search for ‘plumber’, Greenwich because I’m in Greenwich and my flat is flooded. If brands haven’t got a mobile destination or any sort of mobile activity then I’ll just go to the next one. I think the needs state on mobile is just completely different and there’s research that says it takes you a week to go through that whole process of considering something to buying it online, but on mobile, you do that whole process within an hour. Brands I think have to change and definitely FMCG around this impulse buy around thinking that when people are looking through your mobile, they’re ready to buy there and then rather than online, they might be booking a restaurant two weeks in advance or something. I didn’t really answer the question on time, sorry.

What do you believe to be the main driver of m – commerce, is it relying on penetration?

I think is, I think the fact that half the people in this country have now got a phone that can do it I think is one. I suppose if we look at M – commerce as two bits, so M – commerce we think about, as buying things on your phone and then mobile payments would be the bit where you’re using your phone to buy stuff in the real world. So, like I said, it’s just under £18 that people are buying at the moment. Handsets getting cheaper will help because more people will get them. I think the penetration thing is a bit inevitable to be honest and you can see a world in 3, 4, 5 years where the real minority have still got these old phones and they’ll either be my mum and dad perhaps who are just getting to that, they’re 80 years old, they’re not going to do it anyway or people who are actively not getting a Smartphone because they are worried about the privacy thing or what have you. But, penetration is one, probably the main driver, I think brands getting mobile destinations that we can buy things off is another and Google think that 15% of UK brands have got a mobile optimised site which is a shocking number really. You can imagine a site not having a website so when someone searches for you, you're not there and you're saying it's like a shop being closed, it's ridiculous. So, a lot of work we're doing is getting brands to at least build landing pages or what have you and Google are doing a big, I say campaign, a big, thing at the moment which is called GoMo and their basically building a massive directory of people that can build mobile sites and then saying to all brands, look, here's all the people that build them, that can do it for not much money, get in contact, and we want that number that 15% to go up by the end of the year.

So, will that be an advantage for small businesses as well or is it just the big brands?

I think both, so it will be, fortune top 500 or whatever it is, absolutely, but then if you're a little cheese seller in Covent Garden or wherever you are, than absolutely, you should have a mobile destination as well and I think the smaller businesses are the ones that are in the better situation because they can be a bit more nimble and do things quickly. A big business for example, is very lethargic and won't be able to so yeah, good opportunity for small businesses definitely.

So, you talked about Lynx experimenting with mobile, what have you learnt from those campaigns?

I think that, we all thought that proximity SMS was going to kind of fundamentally change everything and drive loads of people in store and all the rest of it. So, we were taking the promotion plans from Unilever so saying that it's on 2 for 1 in Superdrug between this time, Boots it's buy one get one free at this time, and we were mapping that out with O2 proximity so that people in proximity of the store would get the message and we kind of thought that would work really well. The massive problem we've had and the big learning was that, there is no real way of tracking people walking into stores. The main purpose is to get people into stores, get them in front of the deal. Because the spend is so insignificant, you can't really see any sales uplift, really and it's very hard unless you've got a person clicking and saying 'did you see that on your phone' to track people going into stores so, tracking is still a bit of an issue for us in terms of learning's. But the other learning is that we've done these really nice, we've done iAd last year. We did these really nice sexy ad units and people are spending 4, 5 minutes within these units on their phone and we always thought that phones, mobile phones were all about snacky content, so we were like, never make anything over 10 seconds. We know people are watching iPlayer on their, they're watching SkySports. So, I think the other big learning to come out of it is we've got rid of the myth that people are only really doing quick downtime things on there. The majority probably still are, but people are watching films and all the rest of it. So, next time you're at a bus stop or you're on the tube and look round, I guarantee 80% of people will be on their phones, not reading books, not doing other things, they're on a tablet or a phone which is again, amazing.

So from those learning's, would you say there was a case in the industry that there was a bit of living in a marketing bubble?
Yeah, I think so. It's clear it's a brilliant platform for 16 – 24 guys and the ice cream brands for that younger audience, it's extending the reach of the campaign if nothing else and we know that they're shifting off from online onto mobile, but it probably quite hasn't revolutionised it in terms of how much we thought it would, yeah that's fair.

How significant do you think mobile is going to be for the long – term, everyone's focused on the short – term for an uplift. Do you think it can work?
I think it'sso deal focused at the moment, because it's all economic downturn and all the rest of it, it's very hard to see a way out of that at the moment. But, the way you've been able to build brands, I think it's mobile in the mix of other things, I don't think mobile alone, I think it would be very hard to build a brand relationship with someone on their phone. 1. Because it's so personal people don't necessarily want brands talking to them. But it's hard to build a brand with online alone, you've got to do all this other stuff as well. If you've got something on TV where you can take a short code or outdoor where, when we have NFC where you can touch the poster and take it into store. I think along that whole point of a journey, of a person's day, if mobile is this thing that touches all those different touchpoints, I think it could play a massive role long – term. I think on its own in isolation, it's all going to be about

deals, and ‘where am I?’ ‘tell me what’s cheap and I’ll go and get it.’ I think with everything else it could tell quite a nice story. Hopefully.

Sir Martin Sorrell recently said that ‘the most fascinating area is mobile as it’s the biggest discontinuity between how much time people spend on mobile and how much marketers and agencies are investing in mobile.’ What do you think is the reason for this discontinuity?
I think with anything new, there’s always a bit of doubt. I mean we’ve done a lot of testing and learning. If you look at a Lynx media plan, mobile is a third of that now of that digital budget, you look at some and it’s not on there at all. So, I think he’s absolutely right to say that we spend almost more than 20% of our day, yet less than 1% of money is going into it. I think advertisers fear that they’ve got to take money, find money from somewhere else to do it, but he also said in the quote that traditional old press isn’t working anymore. People aren’t reading newspapers, and when they are, they’re reading on tablet devices. So for me, there needs to be a massive overhaul in terms of where we’re proportioning that money from and it needs to come out of old traditional media in my opinion. So I think it’s for our planners in agencies to educate clients on that because they don’t necessarily want to change and we also need to being mobile tracking up to speed whether that’s online and offline to prove to them it’s working so we can get more money. But yeah, it’s a huge problem, I’m glad he said it.

There’s a Mintel report that says there’s only 5% of consumers that are actually interacting with these mobile ads. How do you think that reflects what the industry is doing in terms on mobile? You say there’s only about a third of spending spent there, do you think that’s about right for that 5%?
It’s interesting that, I’ve not heard that before actually. I think, when mobile first came along, because we felt we couldn’t really build brands on it, the sorts of brands that went onto mobile weren’t really nice shiny ones, they were dirty direct response ones; insurance and betting and gambling and all that sort of stuff. So I think we didn’t get off to a great start especially with mobile banners when you think, you know there that big and you’ve got lots of them at high frequency because we couldn’t cap frequency. So I don’t think we got off to the best start and it was all kind

of all about reach but I think more and more you know you've got these iAd type formats HTML5, you've got mobile pre rolls going to be massive for us this year and mobile video. So, I think as the formats become a little bit immersive and a bit more interactive, I think people will spend longer engaging with them. Invariably, if you've got a screen that's that big and you've got a banner there, and it's nothing to do with what you're reading about, you're not going to click on it. I think online can be as guilty as that. But you know once you get behavioural stuff so I can target you in your Hotmail based on you looking at sports content before, I think that gets really interesting and I think more people will start to engage with it.

So do you think some brands are guilty of just taking a creative from TV or online and then just throwing it on mobile?
Yeah, that's what we thought we had to do to start with because it's kind of like, online, the first online ad, the websites were like brochures because all we had was press before so you can only ever do what you kind of, what you knew before. So we had these websites that was just like a brochure but electronic, you couldn't engage with it or anything, then obviously we realised all this stuff you can do with it. And then the same with mobile, we knew banners worked online so we just wacked them onto mobile then we were like 'oh hang on we can start using the compass and the accelerometer and oh we can start adding things to text messages and calendars and we've got a camera on this thing so we can use that as well.' So I think more and more as smart phones develop we use that stuff. I mean NFC, we'll look back in two years time and be like 'what was the world like where we couldn't just touch something and get something from it. So, yeah you always unfortunately start from the place you left off and we started off with horrible banner so, long may they be gone.

So, the reason I'm looking into this research is because there's not really much available specific to FMCG, it's all about banking and retail. Do you think that's sort of a hint that the industry thinks there may not be a role and they didn't want to just publically say there's not?
Yeah potentially, you know, banking's a service so I think it's quite often, it's quite often easier to link a service through. And I think as well with FMCG is they don't

own their own point of sale which has sometimes been the harder bit. River Island can do some stuff because they'll be able to track it internally, whereas Cadbury Whisper sat on a shelf, it's got lots of stakeholders to go through and track it so, yeah maybe they were easier wins.

Ok, we're nearing the end now, but what ultimately, do you see mobile, the role playing? So is it going to be information driven, is it going to be vouchers or direct selling?

I think it'll be a mix, I'll bottle it and say it'll be a mix of all but I think it will be something that's able to tell a story right from the very start when you've not even thought about a kind of product and make you start thinking about it all the way through to, you know think about, it's not an FMCG example but Eurostar where you cannot even be thinking about Eurostar, you could see a search listing and you go on it so you're able to buy your ticket on your phone, you're then able to when you go through to departure gate to touch in and then all your information afterwards when you want to book again is all there at one tap so, I think it's the one platform that can do that whole thing all the way through on and offline. So I think if it can tell a story like that and start engaging with all this other stuff that's happening around FMCG then yeah definitely, I think that's its role.

And finally, what are your predictions for mobile in 2013?

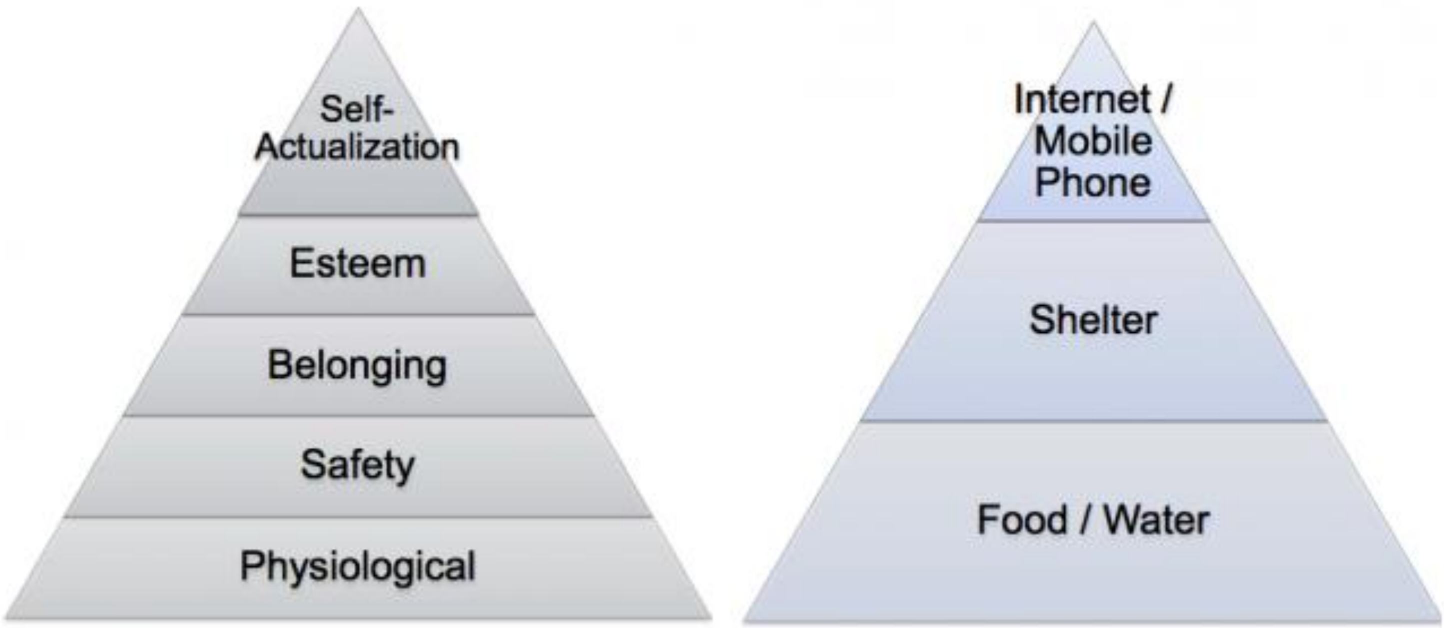
2013. I think NFC and contactless will kind of be everywhere, so I think retailers will really up their game and I'm not sure who's going to help invest in that, maybe the operators. So, you'll be able to touch everywhere and pay, I think we'll be more used to seeing things through an augmented reality screen, so if I don't know how to plug in my router, I can just open a blipper app or some sort of app and it will tell me in augmented reality. And I think the one thing we need to be very careful about is text messaging, so I think if we don't treat it properly, it will turn into the email industry which we ruined as media agencies because everyone's got five email accounts now, four for spam so I think we need to be really sensitive around texts and SMS messaging. And I think, fantastic new formats as well. I can't remember the brand, it's a Unilever brand, they're doing an amazing, you tap a banner and it opens up this augmented reality screen and you're able to go around and just catch things in the sky. So I think, more creative things on mobile is my prediction for 2013.

Appendix 7 – PESTEL Analysis

	Factor	Positive/negative	Time scale 0 – 6 months 6-12 months 12 – 24 months 24+ months	Level of impact High Low Medium
Political		NEGATIVE	CONTINUOUS	HIGH
Economical	BRIC countries becoming increasingly powerful, resulting in a weakened position for the EMEA markets. “While most parts of the world have been officially out of recession since the summer of 2009, the economic recovery in most Western countries has not been strong.” Millward Brown (2011)	Whilst this outlook may present threat to businesses within the EMEA, mobile will present opportunities to become innovative in communicating with consumers on the move in their need to be connected.	The next 12 – 24 months will be crucial	HIGH
Social	**Connectivity** Consumes are now more connected than ever before. The way society communicates in their day to day lives has developed dramatically due to media developments such as social media and mobile phones. Transparency, businesses struggle to come to terms with these changes. How should they adapt and how should mobile play a part in it?	POSITIVE	6 – 12 months will see mobile payments as a great advantage for brands particularly for FMCG with the majority of mobile payments currently under the price of £18.	MEDIUM
	Empowered The consumer is also more empowered than ever before. Where the industry once focused on a naive and passive audience, consumers are now actively searching and expect a brand to behave in the right way.	POSITIVE	6 – 12 months	HIGH
	Ageing Population			

	Typically, older generations are proving more difficult to communicate through the mobile platform.			
	Language As society continues to increase communication through social media and mobile platforms, the English language in itself in transforming. This predominantly sits with generation Y as a result of growing up around the technology.	NEUTRAL	12 – 24 months	LOW
Technological	Consumer's attitudes towards technology is changing. Consumers are not cutting down on technology. It enables the consumer to save time and money, the epitome of the soul of the 21^{st} century consumer.	POSITIVE	6 – 12 months for mobile payments to start becoming the norm.	HIGH
Environmental	Sustainability, CSR. As a result of environmental issues surrounding CO2 emissions concerning society, brands were beginning to be 'seen to be acting eco-friendly to gain momentum from customers. This has now become more a necessity due to developments in capitalism.	POSITIVE	24+	MEDIUM
Legal	Social media effecting legal implications for businesses.	NEGATIVE	0 – 6 months Due to the fast pace of the industry, crisis or business problems can occur and spread worldwide within a matter of seconds through social media, anchored by consumers use of the smartphone.	HIGH

Appendix 8 - 1943 Maslow's Hierarchy Of Needs & Mary Meeker's Development of Maslow's



Appendix 9 - Pringle & Marsh 'The Evolution of the Media Flow'

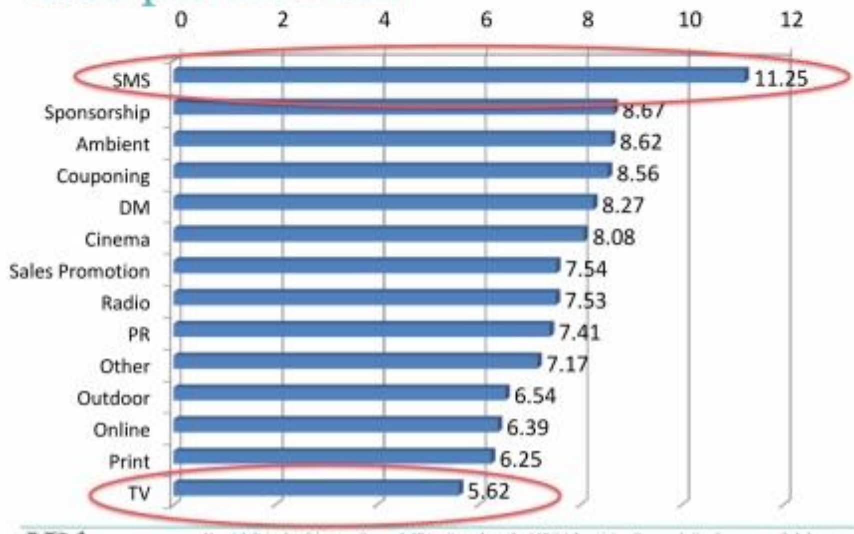
More media options and media usage

Year of competition	No. media options listed in author questionnaire	Average no. media used by winners	% of media options utilised by winners
1980	9	2.40	26.67%
1982	9	2.10	24.00%
1984	9	1.76	19.56%
1986	9	2.00	22.22%
1988	9	1.63	18.11%
1990	9	1.91	21.22%
1992	9	1.70	18.89%
1994	9	1.77	19.67%
1996	10	1.72	17.20%
1998	11	3.83	34.82%
2000	11	4.09	37.18%
2002	12	4.37	36.42%
2004	12	6.25	52.08%
2006	13	6.03	46.38%
2008	17	7.48	44.00%
2010	20	9.18	45.90%

IPA

Hamish Pringle, Director General, IPA . Speech to the MRS Advertising Research Conference, 14th July 2011

Average number of additional media used per medium

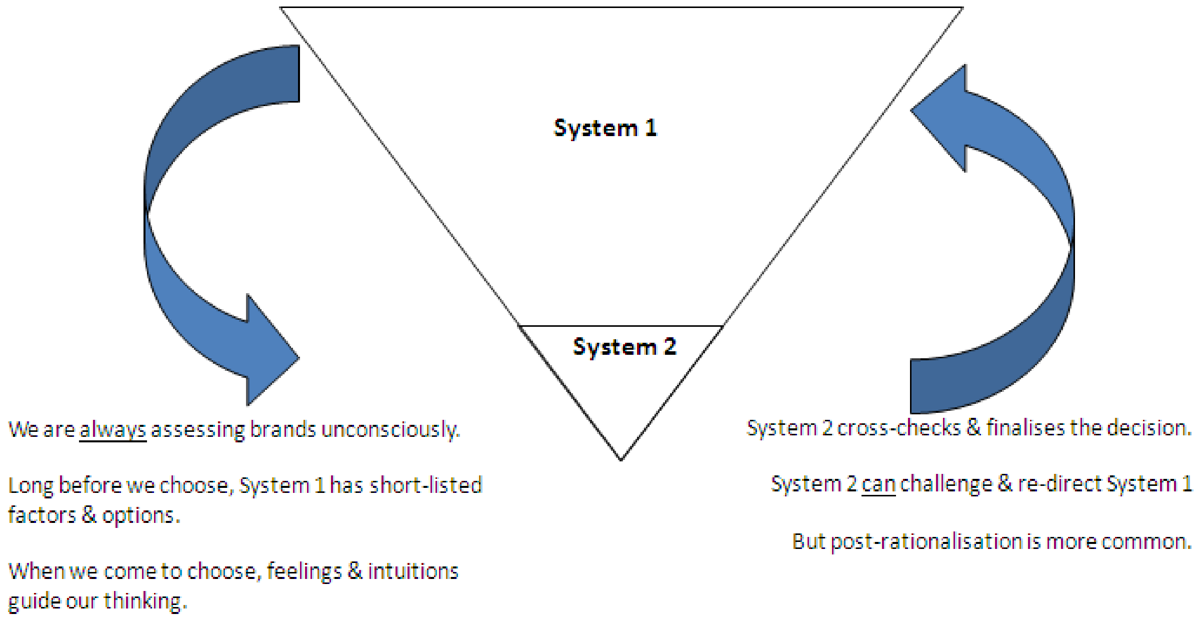


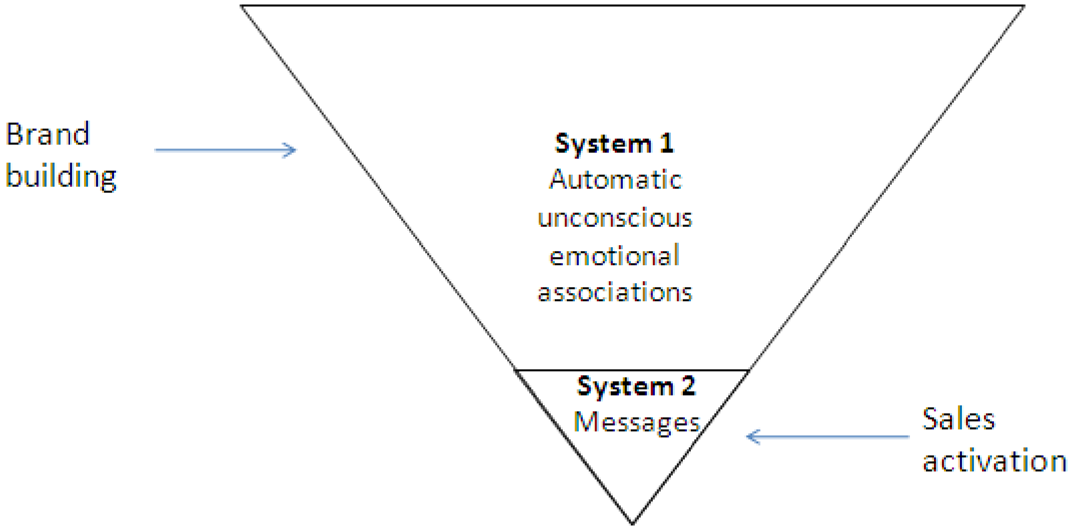
IPA

Hamish Pringle, Director General, IPA . Speech to the MRS Advertising Research Conference, 14th July 2011

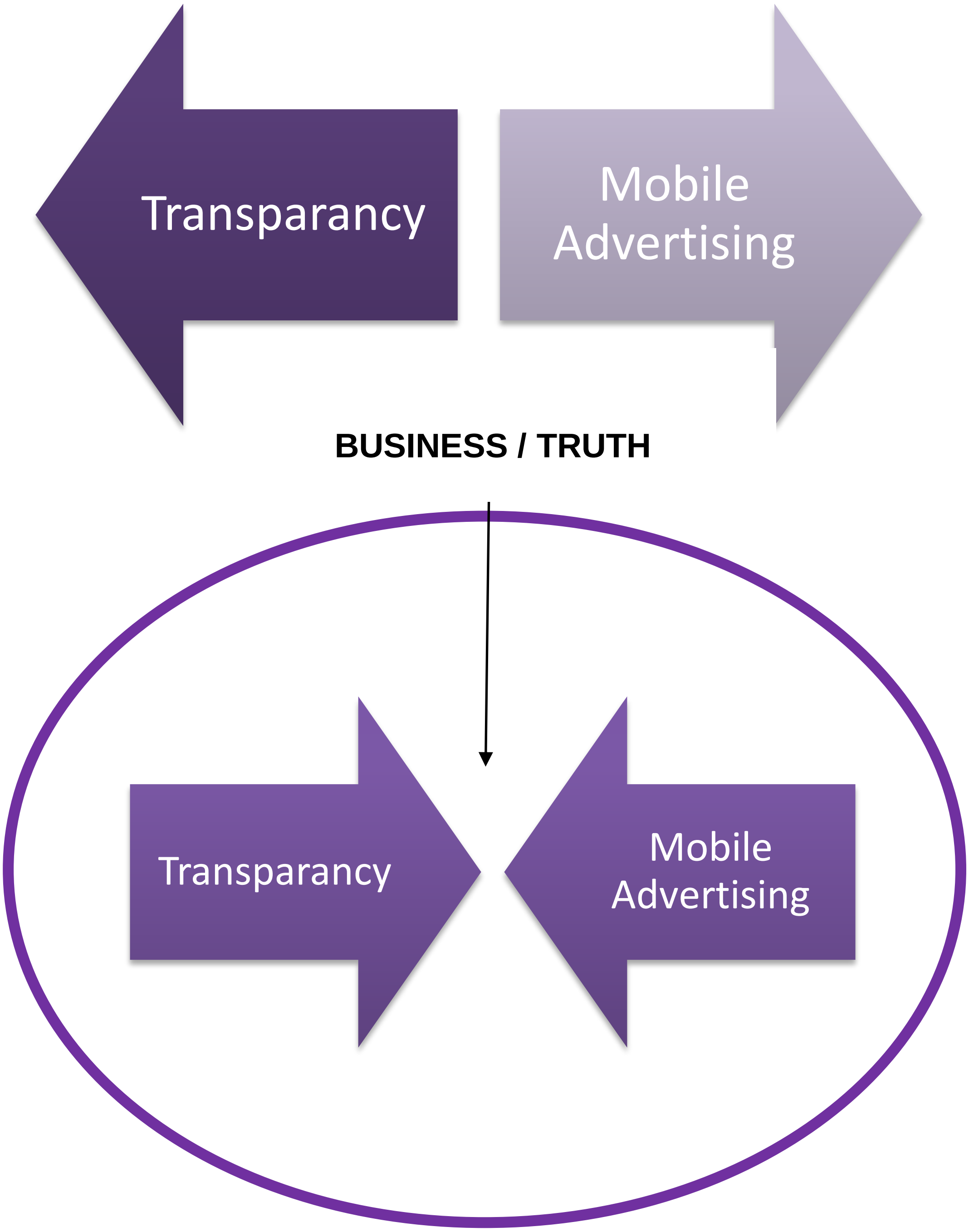
Source: Winning cases IPA Effectiveness Awards 2010 22

Appendix10 -Daniel Kahneman Systems Theory (2011)

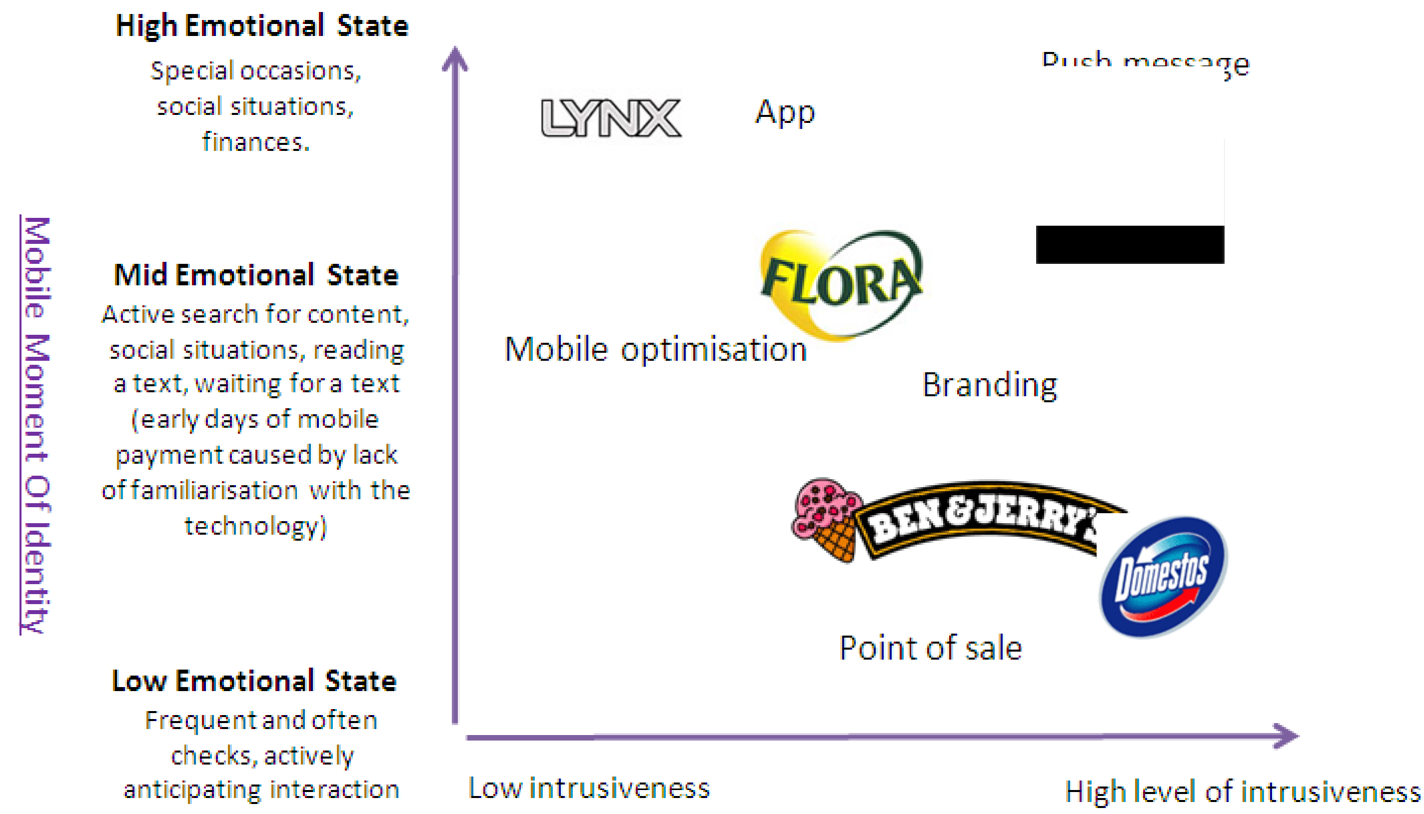




Appendix 11 - New Opportunity For Agencies



Appendix 12 - Mobile Moment Of Identity: Adapted from Gordon & Valentine (2000)



CAMPAIGN OBJECTIVE/KPI/AVOIDENCE

Appendix 13 - Critical Reflective Report& Supervisor Meetings

Relationship building

Acquiring contacts for the interview process involved considerable level of relationship building with existing contacts and in doing so, acquiring new contacts to improve my investigations. All interviews conducted for the research were accomplished in utilising contacts from work placements, particularly with Mindshare. An example of this is the contact gained from Mindshare, CSO of the Mobile Marketing Association and Paul Berney as well as Brand Manager, David Titman. Thanks to Natasha Spencer – Warren and Emily Smith for this.

Research

A skill I particularly improved on whilst working on my dissertation was the ability to research in an effective manner in areas of both primary and secondary data. Having acquired a large amount of resource from my work placement with Mindshare, this required patience and organisation to examine all aspects relevant to my research and filter irrelevant detail. Due to the nature of the technology in the area of study, research developments had progressed considerably. While some of these provided a greater depth and understanding to points already discovered, others were contradictory. This then required a disciplined decision on how to manage these developments, and the extent to which this would affect my research at its time of publication.

Because of the presentation and communication skills that have developed over the course of my degree, I initially felt these would be sufficient for obtaining primary research. It was not until designing the questions for each interview that I considered the importance of body language, probing techniques and vocal indications such as pauses, pitch and tone of voice. It is these subtle indications which affected results of interviews, influencing questions that should be included in the interview to follow. For example, during the first stage of interviews, significance in the length of pause on a particular question for three separate interviews indicated a need to delve further into this area. This resulted in the significant finding which influenced the final analysis of the research with reference to longevity of mobile advertising for an FMCG brand.

Time Management

Having started research for my dissertation at such an early stage, this enabled me sufficient time to examine more accurately and read around my subject area ensuring I produced adequatesupportforthe argument finally developed from the research. Towards the final stages of the dissertation period, I had to manage my time effectively with working at Mindshare while still allowing adequate time to complete my dissertation to the same high standard expected of my research. Additionally, this required a healthy work/life balance in order to complete my work to a high standard.

Project Planning/management

From the various projects I have been involved in throughout my degree, I have acquired essential attributes for both managing and being managed as part of a team. Stemming from this is the ability to work efficiently as an individual. Working in teams for a variety of projects has given me the ability to analyse how group dynamics and leadership affect overall performance.
My performance improved in group situations that were managed with equal contribution, consideration and share of responsibilities, as well as enhancing the performance of the entire group. This is then reflective of the marketing communications industry in the construction of campaigns with regard to the client - agency relationship and the agency team working on the brand.

From these experiences, I have developed the understanding that while there should be a strategy of management to ensure productivity, motivation and problem solving; performance is more effective when based on equal involvement. This will then improve the dynamics of the group, with input from each member of the team being valued and given appropriate consideration.

Presentation/communication

Since I commenced the course in my first year, I have gained a full understanding of the particular subject field, which has given me the confidence to present topics both within the area of my particular interest and those beyond my initial remit. It was from being able to gain this knowledge and explore a number of areas within marketing communications that I took the decision to position myself into a career in digital media. This was then enhanced significantly by my work placement with media agency, Mindshare, as a result of an opportunity to pitch to the agency and their Unilever client. Mindshare provided me the necessary motivation and additional support for research to complete my dissertation. With the support of my lecturers and the agency, I made every effort to position myself in the media industry with an exit strategy towards gaining a position as an Account Executive at Mindshare. Having achieved this position and being accepted to present my findings at the Annual Edcom Conference, I am well on the way to achieving a career in my desired field, whilst achieving unexpected heights at this stage. These have transpired as a direct result of the opportunity to develop my presentation and communication skills through participation in this programme.