

# WIRELESSWORKS

EXPLORING NEW BRAND CONNECTIONS

# INTRODUCTION\_

New technology has been changing our habits as never before and the on-going digital revolution will continue to transform our lives at an accelerating rate. This rapid evolution raises serious questions for brands. Are they going to lose their existing connections to consumers? Is the traditional model of brand building through advertising going to disappear?

There has been a lot of talk about these issues during the recent past but there have been few clues as to what brands can do in a *concrete* sense to succeed in this new environment.

At BBDO and Proximity, we have embraced the task of reviewing the changes taking place, identifying the challenges to be faced and exploring the potential for forging brand connections in this new world.

The first step has been to establish a deep understanding of consumer behaviour through 'multi-local' research. Working with experts in the field from the USA, Japan and Europe, and talking to over 3,000 people in 15 markets, this exhaustive knowledge gathering has been the foundation of a new model of connection that we will share with our clients. It is a model that will enable them to approach new types of consumer connections with confidence and security.

At the outset of this project, we were not quite sure where we would end up. However we were, and remain, convinced that the challenges faced by brands are far outweighed by the opportunities. The next few pages outline our findings, illustrated with examples from our research and material collected during the course of the project.

It promises to be a fascinating journey.

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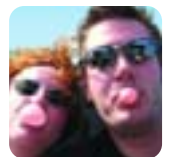
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# ABOUT WIRELESS LIVING \_

The journey began ten years ago, when the mobile phone became part of daily life affecting our relationships with the people and the world around us. Whilst the digital world continues to change rapidly, we believe we can highlight some key behavioural trends that will form the foundation of a new community established in the digital environment.

As Mark Curtis\* points out, “we used to refer to new technology as being always on. But the truth is that it’s consumers now who are always on”. How does this permanent connection impact our life? The first significant evolution is in our **relationship to time**. Time has accelerated. Proliferating new media are demanding people’s time, anytime and anywhere – and their attention spans are getting shorter and shorter.

Dan Ariely\* thinks that “time is definitely shorter, people plan less in advance and impulsiveness has become higher”. For Akihisa Fujita\*, “people are less patient; they think that they can get what they want immediately”. Commitment to being somewhere on time is declining as people use their mobile to scope possibilities and take advantage of them – we call this “approximeeting”.

Which, in its turn, leads to the second major change we have identified – a change in our **relationship to others**. People today connect with more people, and they do so more often: “they have the ability to be always in contact and at the same time they have more control over ‘real’ contacts: there is no need to be together to share”. (Danielle Rapoport\*). Whole social networks are being created through digital connections. As Lars Becker \* says, “the mobile has become this unique and very special lifeline to your personal network”. With news, views and opinions spreading through these new social networks, opinion leaders are able to share ideas more quickly, exchange more information, and have the power to amplify word of mouth. The third major change is in our **relationship to consumption** - how we buy as much as what we buy. Their permanent access to information and constant interaction with their social networks have changed the way people make consumer choices. The internet culture, with its free access to entertainment and ready supply of sites providing price comparisons, has affected the way we choose and buy. As a result, a new landscape is forming for both brands and distribution networks. An empowered consumer is emerging and it is essential that we work out how to connect with them. As Alasdair Scott\* says, “if I was a brand looking at the landscape that’s beginning to emerge, I would be very challenged but also very excited, I would want to engage with it”.

\* – Dan Ariely ‘Luis Alvarez Renta Professor of Management Science’, MIT, Sloan School of Management & the Media Laboratory – Lars Becker, Consultant, ex-CEO Flytxt – Mark Curtis, Partner, Fjord – Akihisa Fujita, President and CEO, D2 COMMUNICATIONS INC. – Alasdair Scott, Creative Partner, Filter, former Chairman of the British Interactive Media Association – Danielle Rapoport Psychosociologue Directrice de DRC, Cabinet d’études spécialisé dans les modes de vie et la consommation



# “MY MOBILE IS MY RIGHT HAND” —

This section summarises the findings of our quantitative and qualitative research in 15 markets around the world, interviewing in excess of 3,000 individuals between 15 and 35 years old, and exploring usage habits and attitudes towards mobile phones. The findings are both reassuring and challenging.

Obviously there are some differences linked to age: 15 to 20 year olds consistently show a stronger attachment to their mobile phone than the older age group - 81% actually sleep with their phone turned on (even among the older group, that figure stands at 73%).

There are also regional variations linked to different types of usage. To cite just one instance: 76% of Australians have used their mobile phone to respond to a brand promotion compared to only 34% of Americans.

The differences though are far outweighed by the common ground. Three areas stand out:

- The **intensity** of the relationship that exists between users and their mobiles
- The sense of **privacy** that permeates this relationship, leading to high levels of sensitivity when it comes to brands using mobiles as a channel for commercial communication
- The level of **reward** for brands – if and when they get it right

"My mobile is like an egg from which unexpected opportunities may come out."

TANIA, 32, ITALY

"Even one ring can change many things."

BURCIN, 29, TURKEY

(In Turkey youngsters call each other via mobile, the phone rings but they shut it down before the person that they call answers it. So they do not talk on the mobile but via this action, they send the message: 'you are on my mind')

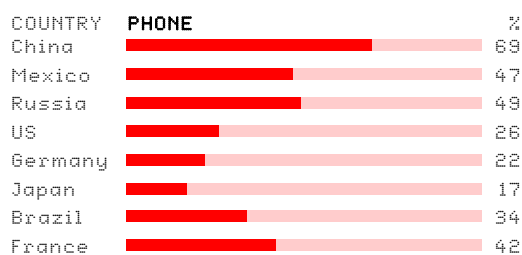


MARIAM, 23, TURKEY



Women in Japan have daytime and evening phones as other women have daytime and evening handbags

IF YOU LEFT YOUR WALLET OR YOUR MOBILE AT HOME, WHICH WOULD YOU BE MORE LIKELY TO GO BACK FOR?



People truly treasure their mobile phones. They are reassured by them. They feel loved and secure when they have them and lonely and anxious when they do not. And they see their mobiles as another way in which to express their unique selves. They do this by changing their ringtones to the latest music, their screen saver to a picture of their partner or best friend and adding details to the outside of the phone.



78% sleep with their phones on - among young French & Spanish women this figure increases to 91%



GLENN, 37, UK

"It's a lot easier to ask for someone's mobile number rather than the fixed one. You can communicate with people you would never have reached before."

LOUISE, 18, FRANCE

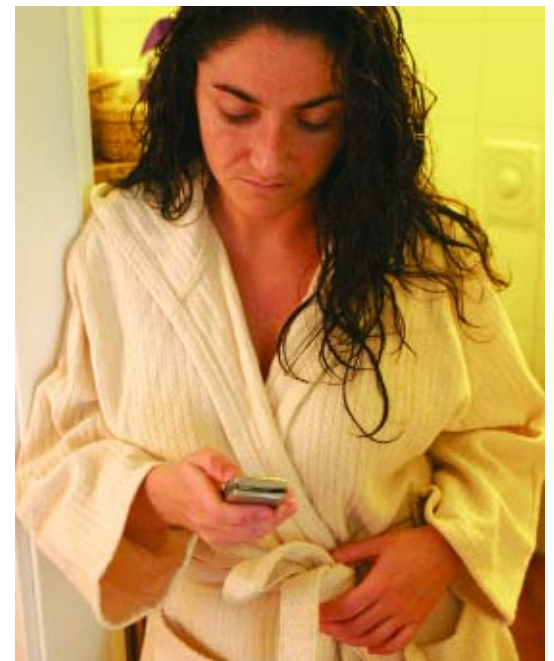
"My phone makes me feel like I'm not an outsider."

NICKOLAY, 29, RUSSIA

In China 70% think a mobile says as much about a person as a car - while in the US only 31% do

"Having the latest mobile makes me feel that I need for nothing. When I meet people in high positions or people in the police department, I want them to know that I have a respectable device." KHALED, 19, SAUDI ARABIA

Almost two thirds (63%) would not lend their phones to someone else - in Japan 90% would not do so



78% call people just to find out where they are



Because a wealth of *private* and intimate information is shared through the mobile, it almost serves as a directory to people's inner lives. In most cultures, it is intrusive and inappropriate to pick up and explore someone else's telephone without asking their permission first. Turn that on its head, and it is unsurprising that few of us welcome unsolicited contact by mobile. A fact that some brands have been slow to register.

"It follows me in the bathroom, I sleep with it... yeah it's with me everywhere... a part of me!"

CELINE, 19, FRANCE

My friends and girlfriend are always with me in my pocket."

KARSTEN, 34, GERMANY

More than half of respondents flirt on their mobiles. The British are the most flirtatious (67% do) - the Japanese are the least (25%)

96% of people screen their calls

"It's an extension of my body and my voice."

CHRISTINA, 29, ITALY

AN AVERAGE OF 48% WORRY, OR WORRY SOMETIMES, THAT THEIR PRIVACY MIGHT BE INVADED BY THEIR MOBILE.

COUNTRY	WORRY	%
China		84
Brazil		62
Mexico		59
Sweden		28
Japan		59
US		49
UK		39

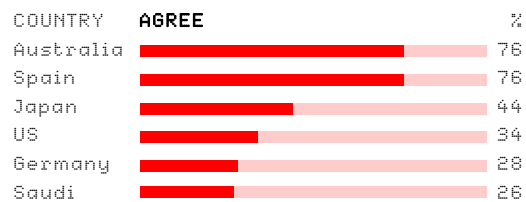




"I welcome brands if what they send is exciting,..., if it gives me something new, so that after having seen it I feel different in a positive way."

TANIA , 20, ITALY

HAVE YOU EVER USED YOUR MOBILE TO RESPOND TO A BRAND?



Consumers are open to commercial communication through their phones as long as it is permission based and adds real value. They are willing to participate in dialogue with brands if there is clear benefit in doing so – be it entertainment, useful information or product benefits. Some groups of consumers are actively seeking just this kind of dialogue.

"Brands should send messages to specific kinds of people based on their age and interest. I learned about Venice island and Doraibi through text messages. I welcome new information."

MARIAM , 25, SAUDI

"When I get messages to my phone I feel that brands are interested in me, thinking about me."

GHADA, 29, TURKEY

"Unless I've asked for it I find it intrusive (to receive brand messaging on mobile)"

PETE, 27, UK

"I am upset enough about the spam on my computer."

ASA, 32, SWEDEN



ROCHELLE , 31, AUSTRALIA

"If Beppe Grillo [a famous politically engaged actor] sent me a video-message - I mean his face close up talking to me on my mobile screen - it would surely have an impact."

ANDREA, 27, ITALY

People say that the most important functions of the mobile remain phone calls (57% rank as most important) and SMS (18% rank as most important). Games, camera and videos are far less important but are growing in popularity among the young.

IF YOU CHOSE TO KEEP ONLY ONE OF THE FOLLOWING, WHICH WOULD IT BE?

	TOTAL %	15-20	30-35	MALE	FEMALE
Mobile	31	33	29	26	37
Computer	45	44	45	50	39
TV	12	8	16	11	14
Other	12	14	10	14	10

# THE EMPOWERED CONSUMER\_

New consumers **want to be in control**. And a new generation of products and media allows them to do just that. With DVRs, iPods, interactive TV, games consoles and the rest, consumers have been transformed from passive spectators to their own DJs, TV station programmers, even film directors.

They **seek personalisation**. Technology has killed the age of 'one-size fits all'. Amazon customers appreciate being recognised by name with 'made to measure' reading suggestions specifically directed to their personal tastes. A new Mini Cooper can have a unique colour combination created on-line with a prospective purchaser. New Nike football boots can be designed through Nike ID with individual colours and embroidered ID.

They **want it now!** Patience is becoming terribly unfashionable. If today's young adults want to talk to someone, they expect to be able to reach them immediately. Wherever they are on the globe. They use text messaging to keep in touch with their friends whilst they work. Even holidays have become instant; with companies like Lastminute.com, they can buy and fly without the need for weeks of planning. Now has never been more important.

They **expect to be listened to**. The last few years have seen a revolution in consumers' relationship with the media. No radio show today is complete without listener comment delivered by sms, e-mail or phone. Reality TV shows have made consumer participation in what happens on our screens an everyday occurrence. Even newspapers, that most traditional of media, now append journalists' e-mail addresses to articles inviting the reader into a dialogue. Increasingly consumers expect to be able to let the media and the brands they buy know what they think, and get a personal (see above) response.

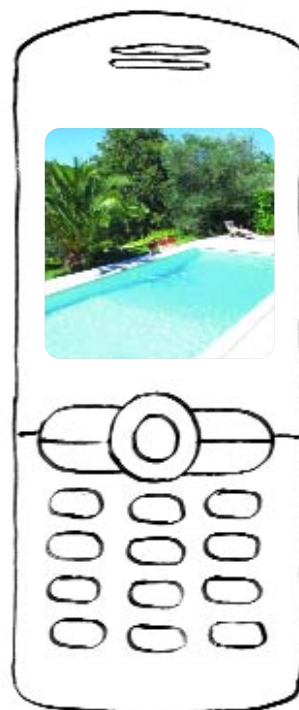
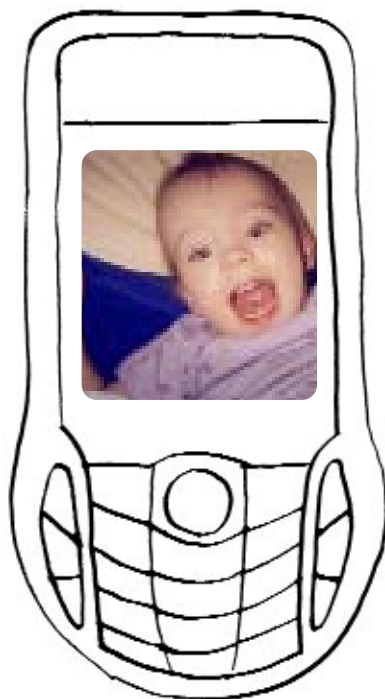
They **look for entertainment**. In a world where the competition for attention has never been more fierce, entertaining communications make the difference between being ignored and being listened to. For consumers who can shift seamlessly from TV to internet to mobile to a game console in search of entertainment, the content that engages and entertains the most is going to win.

They **seek self expression that can be shared**. Anyone can now create their own content – through blogs, online photo and video diaries, music software – but the experience is only complete when they share their creativity with their peers.



"As a teacher, I need to take care with how I dress, but my students don't see my mobile so I can express myself exactly as I wish...so here is my phone. There are a lot of pendants because I love Japan and these are really fashionable now. I also attach stickers and pictures of my friends. For ringtones, this phone allows me to record my own. My boyfriend is a musician and so I've recorded ringtones from his band's songs. Its great fun."

**LAURELINE**, 26, FRANCE



# FORGING A POWERFUL RELATIONSHIP\_

The growing diversity of media is definitely shaking the rules of marketing and communication. There is an inevitable risk that brands may lose the connection with their consumers if they don't adapt to this new environment. Like any period of change this can be profoundly disturbing.

But new technology, and mobiles in particular, offer a unique opportunity for brands to **engage** with their consumers at a more personal, more intense level. The extraordinary position that the mobile phone occupies in people's hearts, its interactive power, its ability to spread messages through a network, its evolving sophistication; all these assets make it a potentially vital route to consumer communication.

At the same time, the very things that make the mobile so valued by consumers also make it a difficult medium in which to work. Access is fiercely protected. Intrusion strongly resented. Consumers have given us one very clear message: brands must always ask for permission before entering this private world.

In fact, there is a wider truth at play here. In a world where consumers are exposed to so many commercial messages, it is essential to offer a new type of brand communication. From interruptive and intrusive to a more balanced relationship based on permission, respect, on-going dialogue, valuable creative content and entertainment. This way consumers will actively welcome a brand and its communications into their lives. The result will be consumers who are positively **engaged** with "their" brands – and who are in consequence more likely to behave as the advocates that a fragmented media world increasingly requires.



COMMUNITY

CONTENT

COMMERCIAL

CREATIVITY

CONNECTIVITY

# THE RULES OF CONNECTION\_

Does this new kind of powerful and respectful relationship with the consumer imply a complete change in our marketing and communication principles?

Definitely not. Fundamentals are more important than ever. The only objective of a piece of communication, whatever the media, will still be to stimulate the consumer's active choice, either reinforcing or changing behaviour. The ability to identify relevant and compelling insights will continue to be the foundation of this work. And in a world where it is more and more difficult to grab people's attention, the power of big creative ideas will have more value than ever.

However the fast-changing complexion of media, mobile included, and the new empowered consumer requires from marketers and agencies a new start point in the rules of connection. Brands that open up new possibilities, that understand how consumers value the new environment, and which explore new areas of creative connection will have a unique ability to engage consumers - perhaps with more depth than ever before. To develop this new approach we propose a guide that will set out five rules and explain how we will seek to engage consumers and brands. It will help point out the pitfalls and help unlock new levels of creativity, imagination and inventiveness.

# COMMUNITY\_

- Digital and mobile technologies have enabled the development and growth of an entirely new wave of communities. The internet has allowed people who share interests, ideas and passions to exchange and debate, often cutting across cultural, social and even national divides. The mobile too (constantly at hand and constantly on) has helped build strongly personal networks - networks that are increasingly important in defining personal identity: *"people now define themselves, especially teenagers, largely by the networks that they exist in"*. (Mark Curtis)
- One of the opportunities for brands is to leverage these vibrant communities. We believe that the most productive approach is to concentrate on a group we call **Active Brand Players**. This is the relatively small group who are by nature more interested and more engaged in a subject; who form and share opinions, and who are seen as trustworthy sources of advice and guidance by the broader group. Dan Ariely recognises this group when he says *"opinion leaders will be the people with many connections to others and marketers have to understand these individuals better"*. Tim Frank Andersen\* provides further support: *"the ability to know will be substituted with the ability to find, filter and recommend."* If we can connect with the active brand players, the individuals who most actively convey information and ideas, we can influence the whole network.
- One brand that has already successfully adopted this approach is Tylenol in the US. The analgesic has created a community of extreme sports nuts who share their best experiences of pain (Ouch!).

In another example, by actively engaging Jeep aficionados through their mobiles, BBDO and Proximity helped create a community of Jeep drivers, who get together in the dunes to share their passion.

In both cases the focus on a limited and tightly defined audience of actively engaged brand players has led to the rapid and positive dissemination of the brand story across a much wider group.

\* - Tim Frank Andersen, CEO, WHERE2GO



# CONTENT\_

- *"If they send me an SMS concerning my interests like sport and music, or business life, I would permit it..."*  
*"If it is exciting and gives something new, so that after having seen it I feel different in a positive way, yes!"*  
These two young women, from Istanbul and Milan, were responding to the idea of brands communicating with them via their mobile phone. What is clear is that this kind of brand communication will be welcomed, but if (and only if) the content is stimulating and personally relevant.
- The challenge here is to identify the right **Brand Content Platform**. Content must be compelling to the audience, but also legitimate and credible for the brand. Something that the brand can turn to its own unique expression to build long term equity. One area that we believe has enormous potential lies in building a content platform, which actively encourages consumers to express themselves and add their own content. Mark Curtis has stated, *"we expect a flowering of content created by individuals using technology to express themselves and communicate."* This kind of approach to content development can play a key role in creating strong engaging dialogue with the consumer.
- Think Dove, the skincare brand which has encouraged women to express their ideas of real beauty through images and words, making them feel engaged and part of the brand story.  
  
And in Dubai, Snickers, the teenage boys' chocolate bar of choice became the definitive mobile platform for delivering football scores during Euro 2004 - thus creating a new level of connection with this particularly difficult target.

# CREATIVITY\_

- The explosion in new media represents a source of creative potential that is still largely untapped. In particular, the power of mobile interactivity introduces a dimension that will open completely new creative avenues. However we must never forget that it must still serve a single brand spirit and idea.
- Clients and agencies alike will have to find a new way of developing creative work. A new approach to address two objectives that, on the surface, appear contradictory:
  - To introduce creative thinking and talents to new disciplines; and find new, inventive and flexible creative ideas that make the most of technology and the strengths of new media.
  - To develop big campaign ideas that will provide synergy and connective spirit to the whole creative output.

The major difficulty is how? We believe that it all comes down to the creative people, their talent and their ability to be led, inspired and directed by a strong creative leader. And it is essential that they meet, even virtually, in **Creative Hubs**. Led by the creative director acting as a guardian of the campaign idea, each hub will facilitate the interconnection of different areas of creative expertise, so building an environment that fosters the execution of creatively engaging multi-faceted campaigns that serve a single brand idea.

- Have you visited [www.subservientchicken.com](http://www.subservientchicken.com)? The campaign uses a website in which a person dressed up as a chicken appears to follow commands typed on a keyboard. A powerful piece of viral marketing which is giving a new creative spin to Burger King's brand idea: "Have it your way".

Another example was Pepsi's involvement with the Middle East equivalent of Pop Idol. At the climax of the show Pepsi showed a TV commercial with all eight finalists on a boat and only one can of Pepsi. Viewers were asked to vote for the singer they wanted to get the Pepsi by either texting or by logging onto to [www.pepsiarabia.com](http://www.pepsiarabia.com). The campaign was supported through online media, TV and print and demonstrates a typically smart and successful Pepsi take on a famous show, consistently expressing the core Pepsi idea.

# CONNECTIVITY\_

- The explosion of technology has led to a proliferation of opportunities in new and old media alike. As Brian Tiong\* told us, *"the opportunities these new technologies present is that now, we can communicate interactively to our mass TV audience and form a one to one relationship with each viewer using simple basic technologies like SMS"*. While this multiple channel approach can undoubtedly help brands become more sophisticated and precise in their targeting, it also raises many questions. What is the right mix? What is the role of mobile? How do these media interact?
- Wireless works best when it is connected to the breadth of the media mix. Our task is to ensure that opportunities to leverage the power of mobile and other technologies, are introduced early in communications planning. (The danger otherwise being that channels like mobile end up as little more than a vehicle for promotions rather than conduits to personal brand relationships.)

We believe that a **Connective Map** describing and defining connections between different media is an essential tool to be used at the outset of campaign development. The connective map will enable the creative hubs to develop the optimal matrix of messages to ensure maximum impact and engagement. It will also play a key role in facilitating the media planning development.

- An example of this type of media connectivity is well illustrated by Nike's "Recon" New York scavenger hunt campaign. Launched through mobile messaging, supported on-line and with posters, Nike excited its audience to search the streets for clues that would give them access to Nike's coolest new model.

Also in the U.S., Doritos, working with BBDO and external partners for mobile and on-line, launched the interactive and engaging inNw? (if not Now when?) campaign. The campaign weaves together on-line and off-line media. Interconnecting TV, Outdoor, SMS and on-line, each medium building on the others and with interactivity at its core, this very new integrated campaign seems to have generated high levels of engagement for the brand.

\* - Brian Tiong, VP Network Marketing, MTV Networks Asia

# COMMERCIAL

- Mobile and other new technologies offer a scale and quality of metrics that have previously been unavailable.
  - hard data (from number of messages received to rate of coupon barcode usage)
  - soft data (from user feedback to instant polls)
  - interactive data (from message forwarding to traffic generated at POS)which, in its turn, allows brands and agencies to assess campaigns in a greater depth, with greater accuracy and more responsively than ever before.

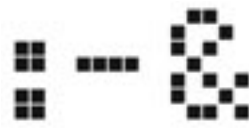
- Even with this wealth of hard and soft data we are still left with a gap - assessing how effective a campaign has been in creating active choice.

A new generation of measures like Proximity's **Behaviour Change Metric** will use multiple correspondence analysis through hard/soft/interactive data, test procedures & qualitative feedback. This tool will help us improve campaign performance and understand, for example, whether a brand delivering entertainment, information or sporting content through a mobile or digital platform is actually achieving its objective of changing people's behaviour.

- The power of mobile interactivity to generate consumer action has been well established. A recent example comes from Portugal where Pedigree and Proximity developed a low budget SMS and e-mail campaign to launch a new dog food product. Pedigree were amazed at an 800% increase in traffic in one day to the Pedigree website, traffic fuelled by dog owners seeking information about the new product.



Hello les gars je suis en vacances depuis 10 min c trop le pied



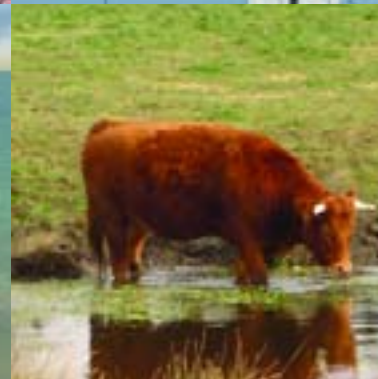
rahh im b0red, i wnt out n gt new outfit, propa jkz.. Are u 2 going to Trevs dis wend?



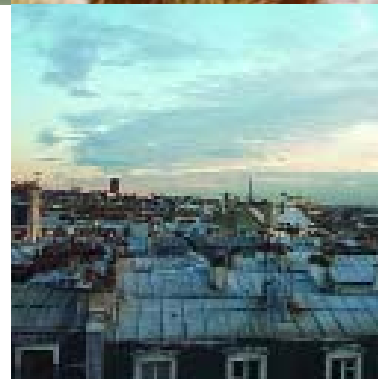
Thx. =oP. Yep the weekend was wicked! cya l8r xXx



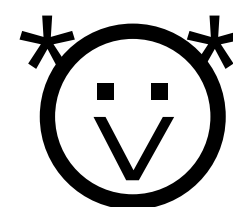
Moin, Macht doch nix :) Ich Geb mein bestes. Matze



I'm swimming in: absynth, Hungarian spirit and something else. I don't understand nothing..



Gruess Gottle akla? Bin krank daheim : ( ruf mich an BB



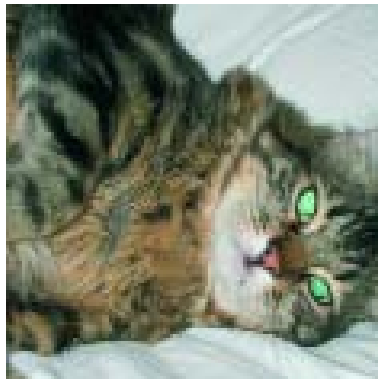
Alice est parti hier L t'embrasse fot mais pourra pas tappeller



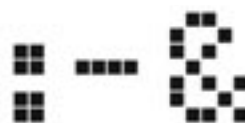
Si papa, j'esper  
ke tu va bien. Ne  
rentr pa trop tar.  
kiss ze TM



Io vado in p.zza  
Uetra n.21 per le  
19,aperitivo  
africano 8€. Zona  
ticinese. N



Good morning my  
sweet love, I will  
think a lot to you  
to make you recover  
quickly. A kiss from  
a foggy Milan



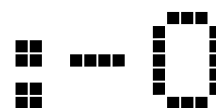
Eres lo mas  
importante de mi  
vida



Psg/Marseille 3-2  
Cla honte pour  
eux...



Grazie perché,  
come sempre,  
arrivi a  
ricordarmi quanto  
di bello c'è nel  
mondo.



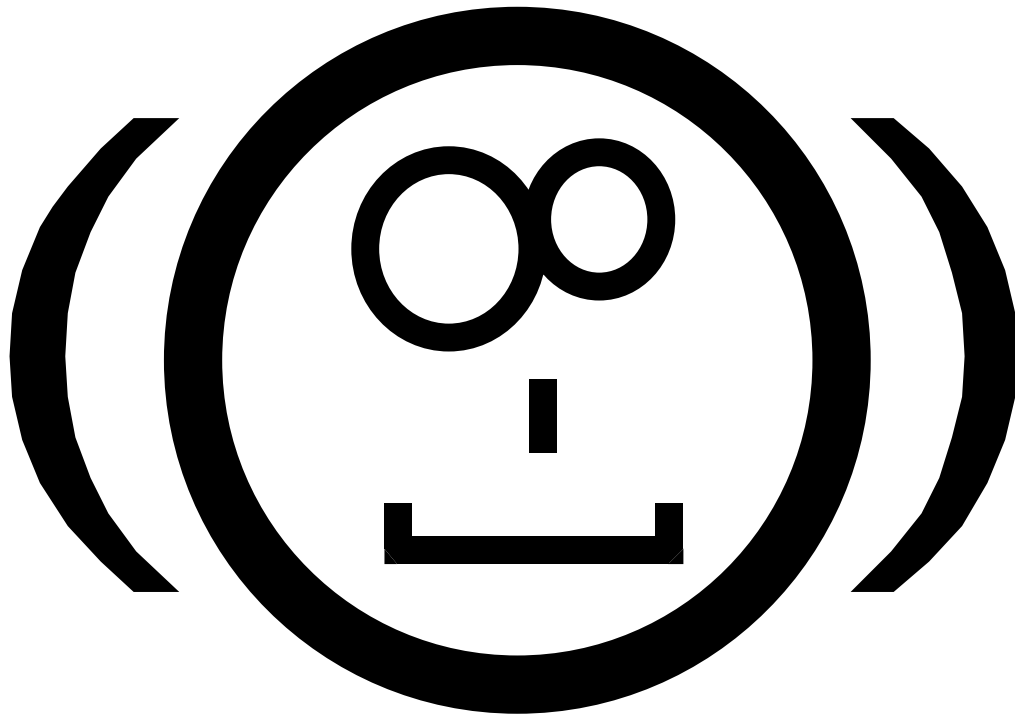
2MORO Tomorrow

IYF In your face

U@ Where are you?

:( Pig

F2T Free to talk



:-0 Surprised

:-0 Surprised

:-@ Screaming

BF Boyfriend

(you) Hug

W8ing Waiting

2 To/too/two

:-D Very happy

WOT What

L8r Later

BTDT Been there done that

M80 Matey

CLAB Crying like a baby

BFN Bye for now

OTL Out to lunch

BTDT Been there done that

B/C Because

SMD Serious mode on

SAL Such a laugh

@-'-, Rose

# REMEMBER\_

- 01 .....  
Mobile space is personal. Getting permission is essential.
- 02 .....  
Commercial content needs to be personally relevant and continually refreshed.
- 03 .....  
Adding value through entertainment and creativity is a priority.
- 04 .....  
The medium is interactive so dialogue with consumers must be anticipated and systems put in place.
- 05 .....  
Mobile campaigns work best when integrated with other media.
- 06 .....  
Be ethical. Transparency, consistency and respect will be key.
- 07 .....  
Campaigns that enable consumer self-expression will be particularly appealing.
- 08 .....  
Mobile communication is instant. Brands operating in this space must respect this reality.
- 09 .....  
Targeting of active brand players can generate a disproportionate impact.
- 10 .....  
Don't wait too long. The big prizes will be awarded to those brands prepared to innovate and take advantage of the new opportunities early.





# THE FUTURE\_

Will the mobile phone be replaced by a multimedia personal computer - or will people have both in their pocket? When will we be able to turn on the central heating while we are still 100 miles from home? Which electronic device will take off in 2007? How many hours a day are we going to spend in the virtual world?

There are thousands of questions that will be raised. And for most it is impossible today to give definitive answers about tomorrow.

The same principle applies to marketing and communication. We are at the beginning of a profound transformation. We believe that we must conquer any reticence and enter this world with enthusiasm to explore, establish and experience new types of brand connection. But we also believe that we must learn, evolve and continue to adapt. To this end we are launching a digital lab, a BBDO and Proximity joint venture whose primary objective is to help clients anticipate and prepare for rapidly changing trends in the brand communication and media environment.

The Lab will bring together experienced personnel from the BBDO and Proximity networks, together with experts from a wide range of complementary fields. It will offer consultancy to clients looking to maximise their investment in channels based on new and emerging technology. It will act as an active support to BBDO and Proximity when they are developing campaigns that leverage new technology. It will become the centre of expertise for consumer knowledge, brand case studies and forward thinking.

Permanent access to The Lab will be possible through a dedicated 'blog'. It will offer a publishing platform; a forum for the free exchange of ideas and best practice; a means of commissioning work and sharing results and a dynamic community of interested participants. The Lab will also give you access to the extensive findings of our research.

[www.bbdolab.com](http://www.bbdolab.com) or [www.proximitylab.com](http://www.proximitylab.com)

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**proximity** Worldwide

**The Lab**  
EXPLORING NEW BRAND CONNECTIONS



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