Housekeeping

- Please <u>silence all electronic devices</u>
- Be social: Introduce yourself to others
- Photos/blogging: Kindly refrain
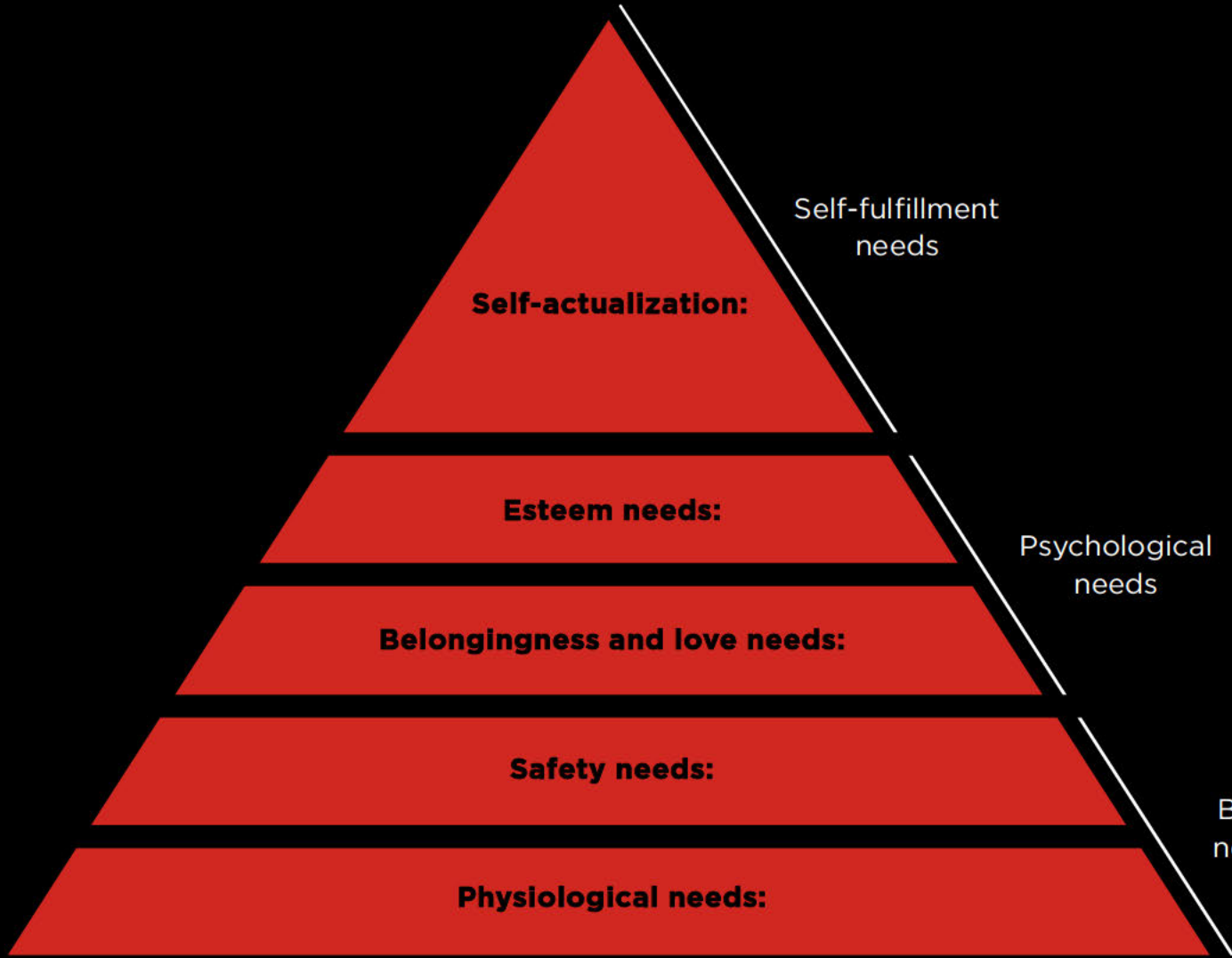- Restrooms & coat check - downstairs

Collaboration + PARTNER SM(ART) to Win - Finding Our Swing

Andrew Robertson
President, CEO
BBDO Worldwide
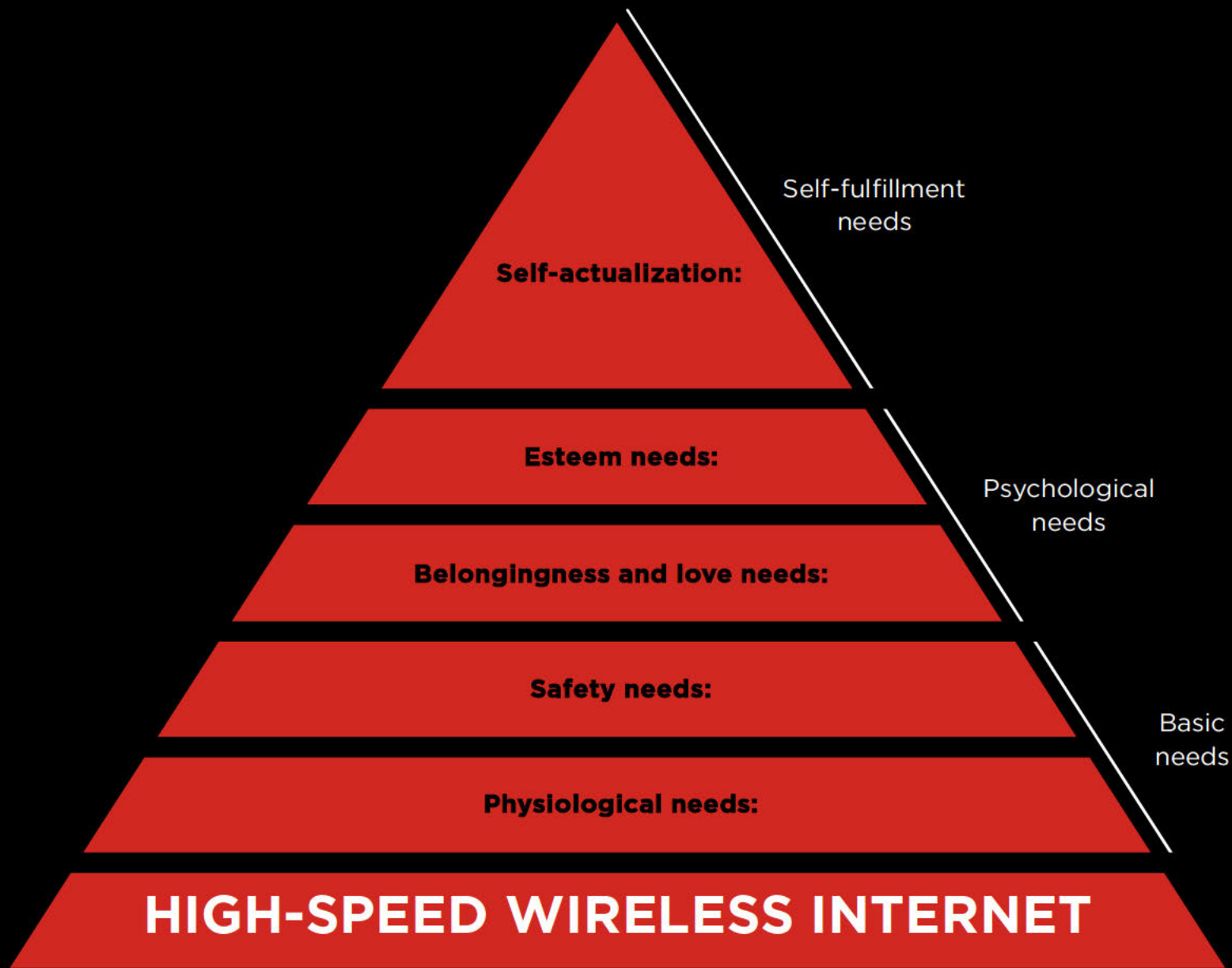
TARGETING

TARGETING CONTEXT

TARGETING **CONTEXT** **MESSAGE** **CREATIVITY**

Right Person, Right Message, Right Way + Right Time

Erin Matts
CMO, Annalect

Right Person, Right Message, Right Way, Right Time

EMERGE 2015

annalect

How are we going to get there?

1 Data

2 Technology

3 Collaboration

annalect

The Omnicom model supports this
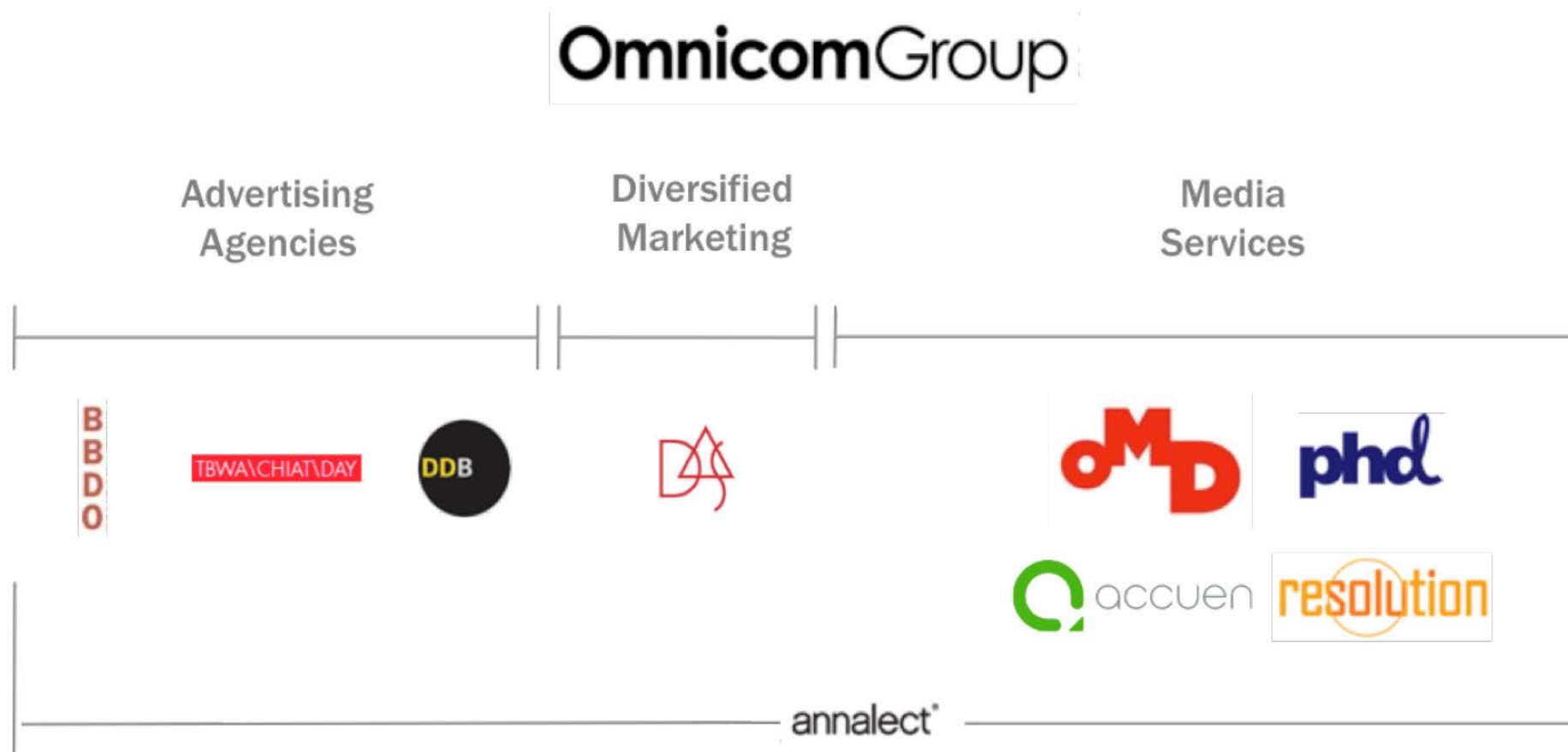
Best in class, clients first

Enterprise Level Partnerships

TOP DOWN

| Value | Creativity | Data & Technology | Intelligence |

BOTTOM UP

Customized Solutions for Clients

annalect
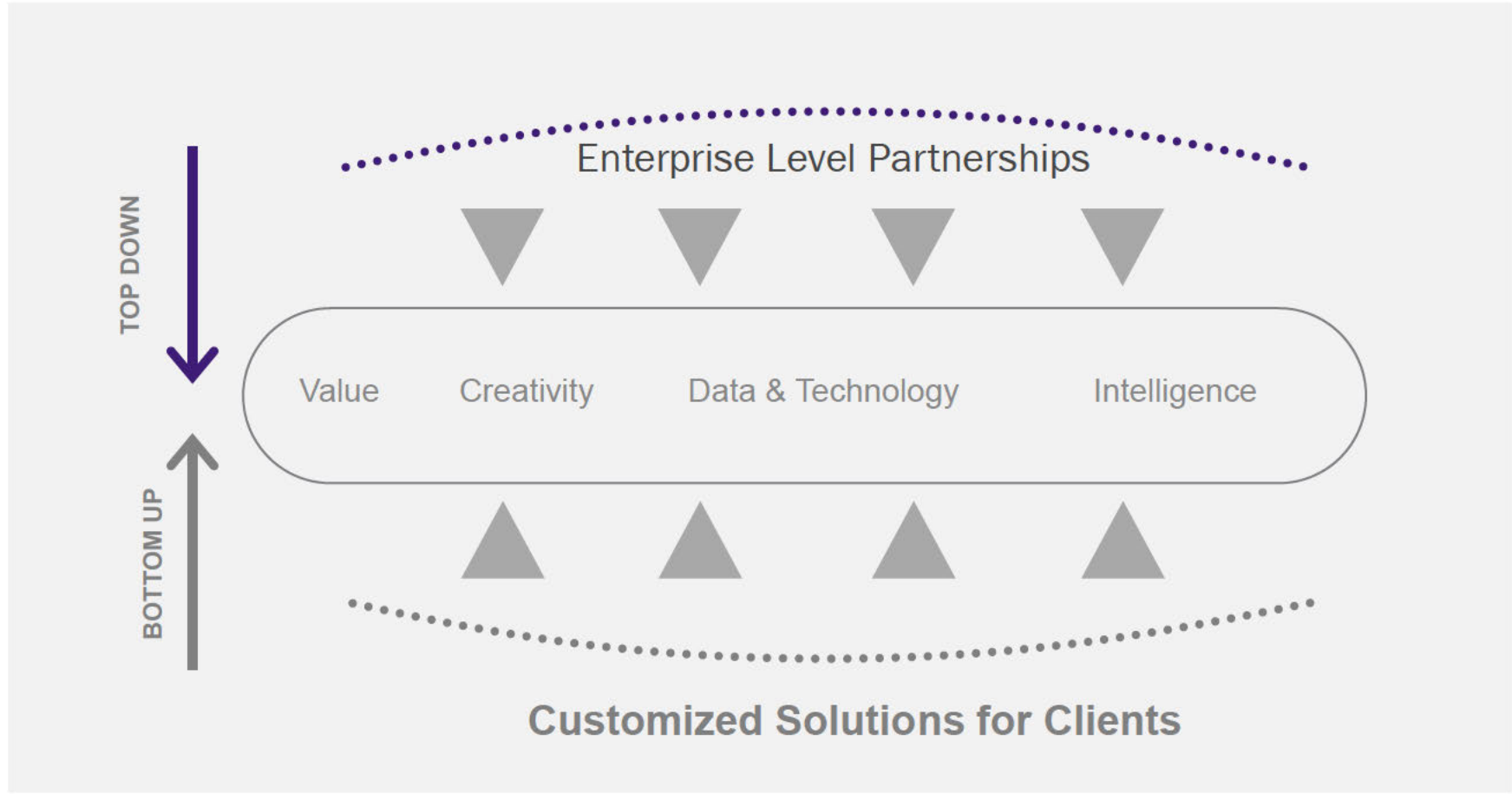
Industry leading partnerships

annalect

Getting there: data & technology

Data

| CRM | Hundreds of syndicated data APIs | 32B global audience attributes |

annalect

Getting there: data & technology

Data

CRM

Hundreds of syndicated data APIs

32B global audience attributes

Tech

Cloud based data platform

DMP

Programmatic media

Programmatic creative

Publishing platform

Cloud data exploration platform

annalect

Getting there: data & technology

Data

CRM

Hundreds of syndicated data APIs

32B global audience attributes

Tech

Cloud based data platform

DMP

Programmatic media

Programmatic creative

Publishing platform

Cloud data exploration platform

Analytics

Audience creation and syndicated
Predictive modeling

Testing
Portfolio management
Attribution

Rent

Built

annalect

The second golden age of CRM

Finding an elusive audience

Unrecognized Movers: USPS mass reach coupon program

Recognized Movers: Reach individual movers based on variety of data-informed behaviors

Data based audience buying:
- Search for moving companies, cable providers
- Applied for home insurance, mortgage lenders

annalect

When NOT to talk to customers

Suppress messaging to current customers

41%

Increase in conversions in first 90 days

Media, media, media!

Science > Art?

>

annalect

"Optimized messages, optimal moments"

A25-34

Quality

Nostalgia

Offers
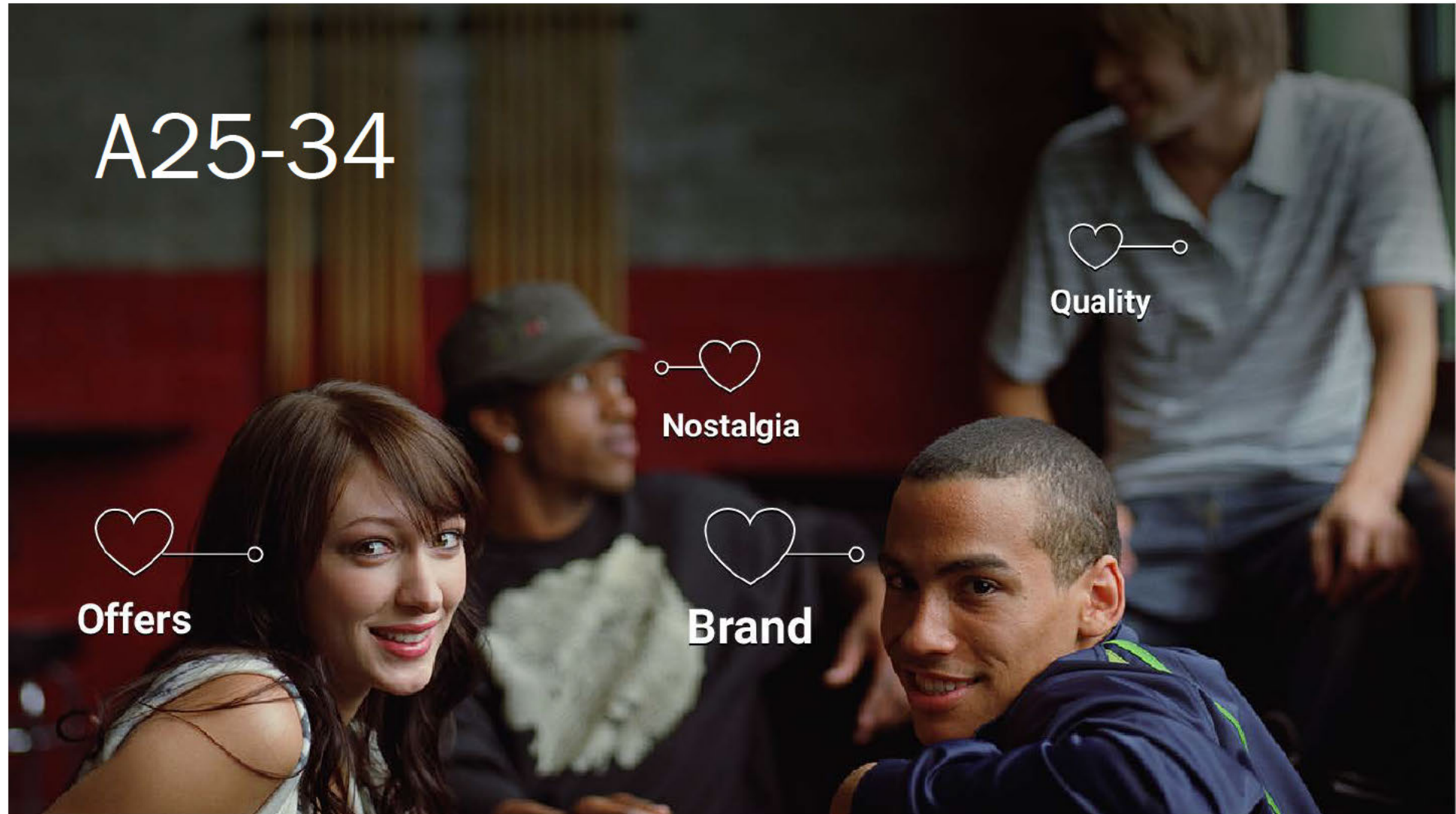
Brand

Richer insights = smarter reach
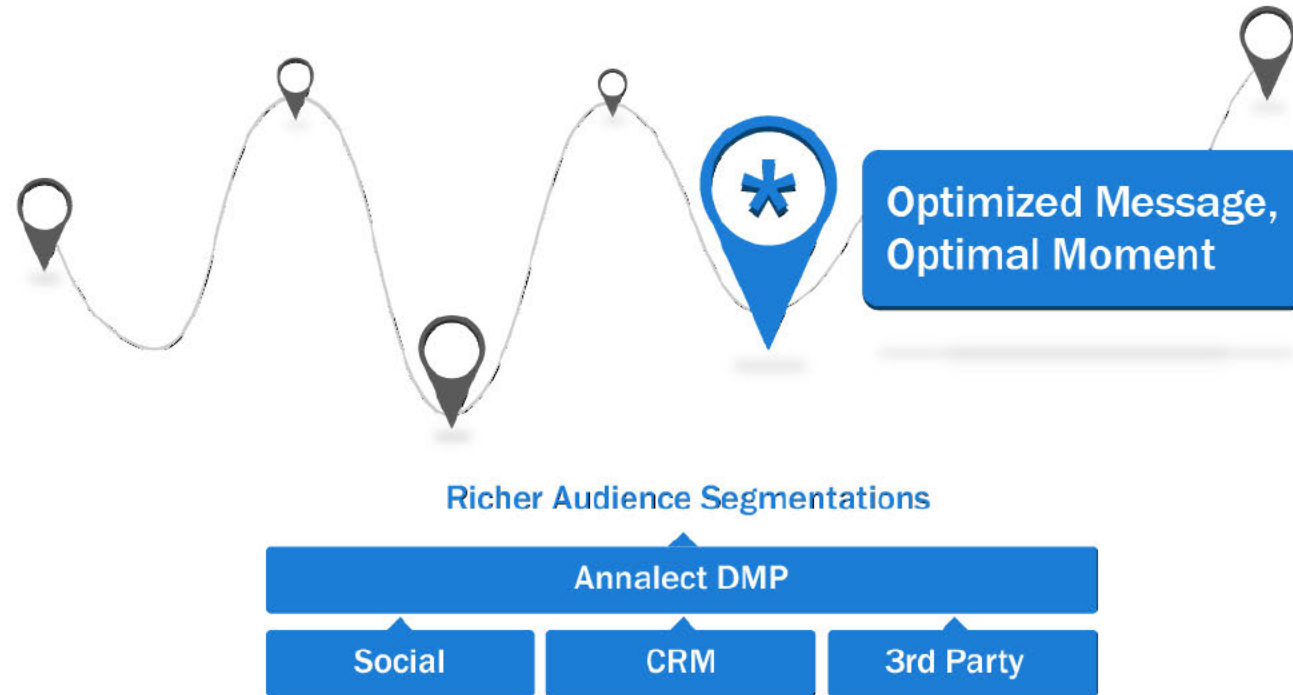
Deconstructing – and reconstituting - creative
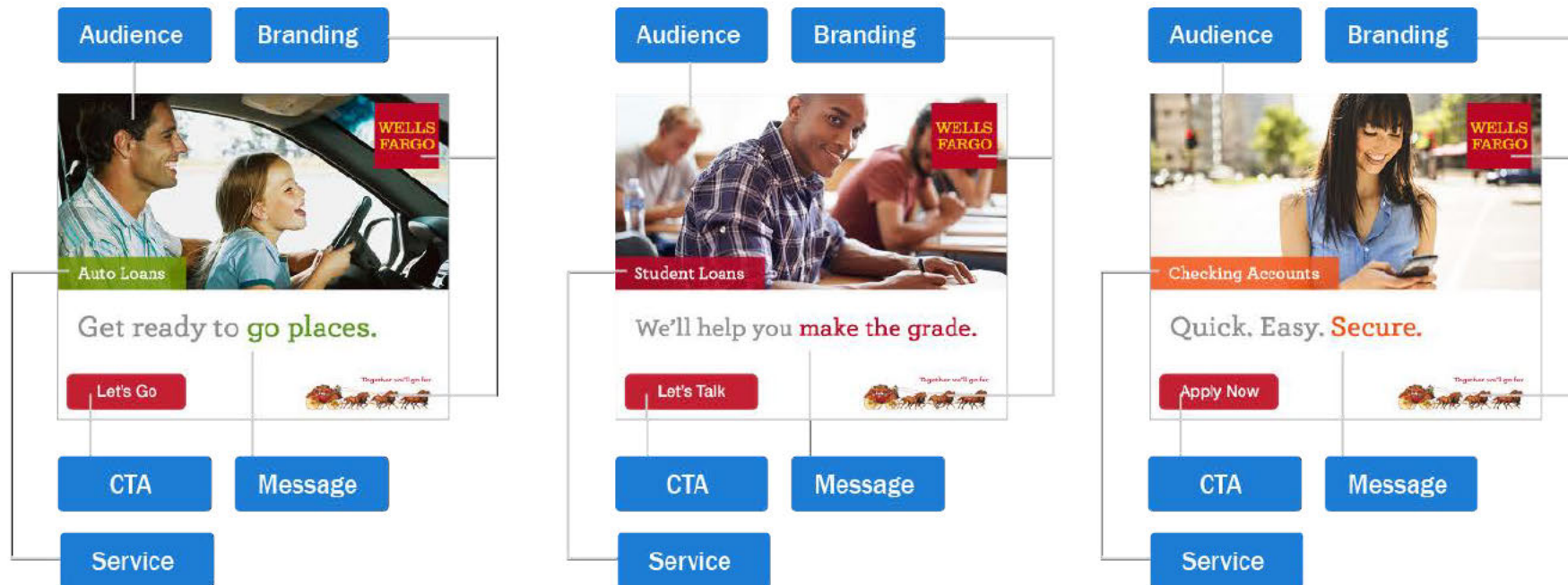
From "finished ads" to nuanced elements

Branding	Service	Audience	Message	CTA
WELLS FARGO	Auto Loans		Get ready to go places.	Let's Go
Together we'll go far	Checking Accounts		We'll help you make the grade.	Let's Talk
	Student Loans		Quick. Easy. Secure.	Apply Now

annalect

Assembling targeted ads dynamically

Digital Asset Repository

Assembled Ad

Credit Cards

Pay yourself *forward.*

Get Cash Back

Optimized for Segmentation

✔ Right audience
✔ Right offer
✔ Right message
✔ Best ressembler
✔ Extended Attributes

annalect
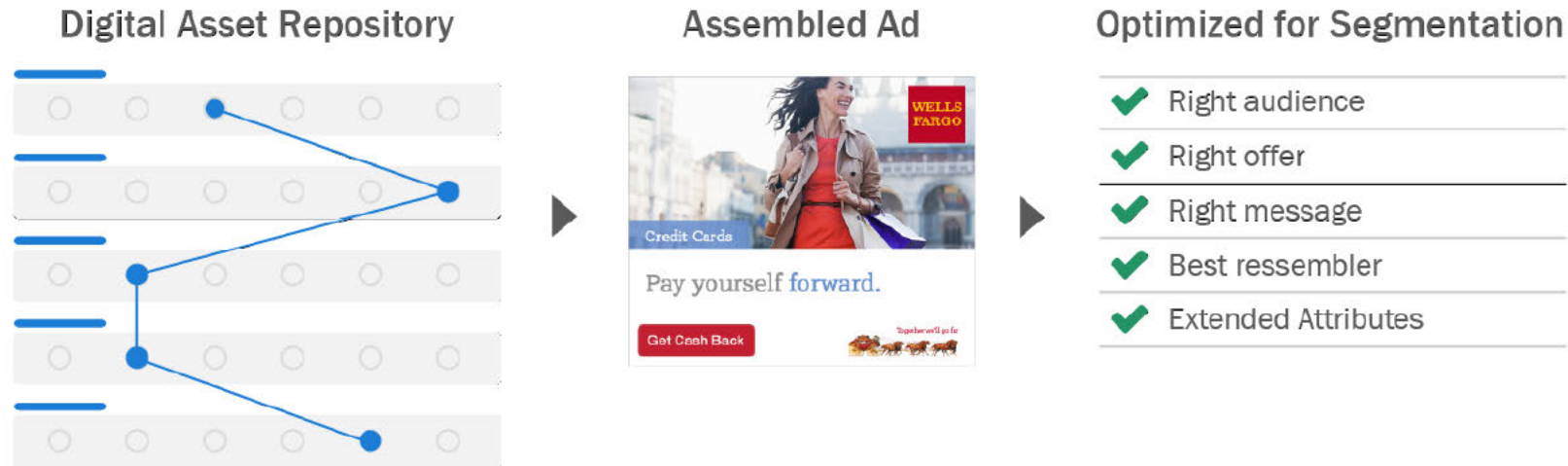
Delivering on the original promise of 1:1

Student

Trusted Advisor

Financial Freedom

On Their Own

Financial Apps

On Their Own, Hispanic

Family Security

Family, Hispanic

annalect

WELLS FARGO

annalect
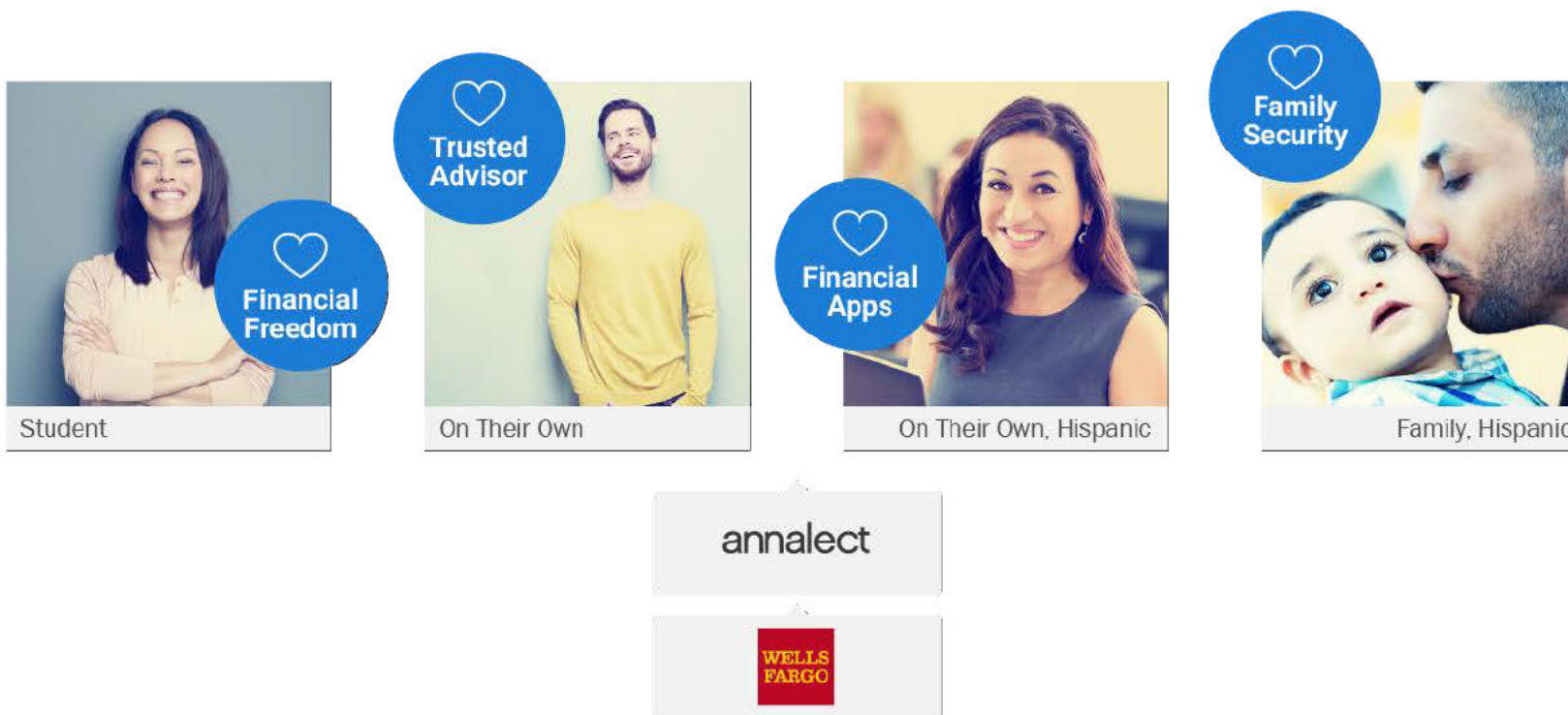
Realizing the dream – FTW

ADWEEK

Wells Fargo Readies Shift of Media, Digital Business OMD, Organic expected to gain share By Noreen O'Leary

AdAge.

Wells Fargo Consolidating Media Account With Omnicom's OMD

Company Spent $170 Million on U.S. Measured Media in 2013

annalect

We win when we collaborate

We win when we combine art & science

annalect **BBDO** oMD **organic**

Right person, Right message, Right way, Right time

Thanks for your continued collaboration!

annalect

...speaking of collaboration

Did someone say SQL?

annalect

Ready, set, hack!

Don't just sit there – help a Hacker!

Swing by 75 9th Avenue, Chelsea Market, and help out a Hacker team!

Offer tips, guidance, insights, or dig into the data yourselves.

annalect

Hackers present their ideas tomorrow

Fueled by:

1 Data

2 Technology

3 Collaboration

GOOD LUCK!

annalect

EMERGE-A-THON Intro

Erin Matts
CMO, Annalect

Tech Partner Workshop

Jacqueline Indelicato
VP, Development
DAS Group of Companies

Workshop Challenge

1:40PM – 2:40PM (60 min)	**TECH PARTNER WORKSHOP: IDEATION** Ideation in Teams
2:40PM – 3:40PM (60 min)	**TECH PARTNER WORKSHOP: PRACTICE** Teams Develop Presentations Each team to choose 2 presenters (1 agency, 1 tech partner)
3:40PM – 4:20PM (40 min)	**TECH PARTNER WORKSHOP: PRESENT TO JUDGES** Judges Select Top 6 Teams (1 from each Tech Partner)
4:20PM – 5:15PM (55min)	**TECH PARTNER WORKSHOP CHALLENGE: WINNERS SELECTED + ANNOUNCED** Top 6 Teams Present Their Winning Ideas

NOTE: To protect the privacy of our partner relationships, partners will only be present for their presentation. ALL others will be directed to the GREEN ROOM.

Quick Fire Case Studies
Tech Partner & Agency

Amy Cowan
Director, Global Head of Agency Business Development
Google

John Fundingsland
Agency Business Development
Google

OmnicomGroup

Behind the Scenes
Lessons in Brand Content Creation
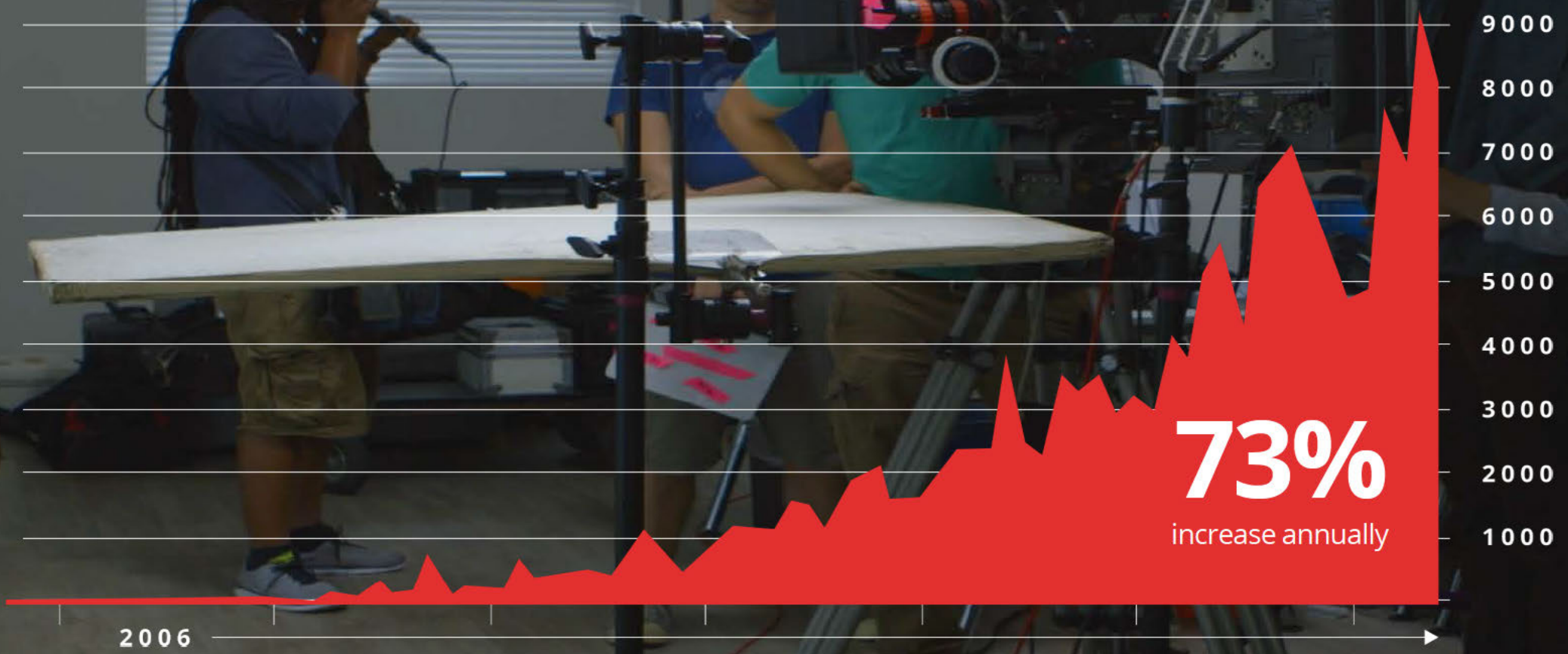
Presented by:
Amy Cowan, Global Director, Head of Agency Business Development, Omnicom
John Fundingsland, Creative Agency Business Development

Google

Should I invest in digital?

Google

Monthly videos posted on
YouTube by Top 100 global brands

9000
8000
7000
6000
5000
4000

73%
increase annually

3000
2000
1000

2006

Google

How should I invest in digital ?

Google

In 2014, **4 of the top 10 videos** on YouTube were created by brands.

The 10 most-viewed ads on YouTube in 2014 earned nearly **1 billion minutes** of watch time.

How are brands driving tune-in?

Google

① Create

② Partner

③ Play

Google

Why it worked?

② Partner

Google

7 YouTube Stars Help Tease Nissan's Return to the Super Bowl Dads have more fun in these clips By Andrew McMains

January 22, 2015, 11:50 AM EST | Advertising & Branding

YouTube personality Roman Atwood is known for his pranks. Now he's helping Nissan show how dads help their families have fun.

Google

Why it worked?

③ Play

Google

Why it worked?

from
storytelling
to
story-building

Google

Thank You

Google™

Quick Fire Case Studies Tech Partner & Agency

Denzil Samuels
SVP, Global Business Development
& Partner Investment
Salesforce

Live Nation Case Study

Sales

Service

Marketing

Apps

Analytics

Community

THE CUSTOMER SUCCESS PLATFORM

The Customer Data Revolution

90% of Data Created in the Last Two Years

10x Mobile data by 2020

19x Unstructured data by 2020

50x Product data by 2020

Honeywell – Lyric – Case Study

Salesforce: The Customer Success Platform

salesforce force.com

salesforce heroku

Build **employee**

Develop **customer**

Growth Driven by Customer Success

Fastest growing top 10 software company

32%

+ Customers
+ Developers

CISCO
Merrill Lynch
L'ORÉAL
verizon
ACTIVISION
PHILIPS
Virgin america
StanleyBlack&Decker
TOYOTA

JP HOLDINGS
LIVE NATION
ADP
Google
hp
Bank of America

Symantec
Honeywell
SONY
AXA
workday
ING

FY08

FY11

FY15

salesforce

What's Next – How Do We WIN Together?

- We are building a TEAM dedicated to OMNICOM

- We will help you build Salesforce 'Centers of Excellence'

- We will share content, assets, training and enablement

- We will build solutions that 'change the game' for our customers!

- Mutual client mapping & opportunity identification & co-sell

- We will share rich client case studies and duplicate success

- Please join us for 'Connections' and 'Dreamforce'

salesforce

Quick Fire Case Studies
Tech Partner & Agency

Sarah Personette
Head of Global Business Marketing
Facebook

EMERGE 04.22.15

Sarah

Head of Glo

Facebook &

The world is going

MOBILE

2.85hrs

spent on mobile devices per person every day

People are watching more video

>3B videos views per day

75% video growth year after year

Mobile is a media platform.
Increasingly, video is the medium on mobile.
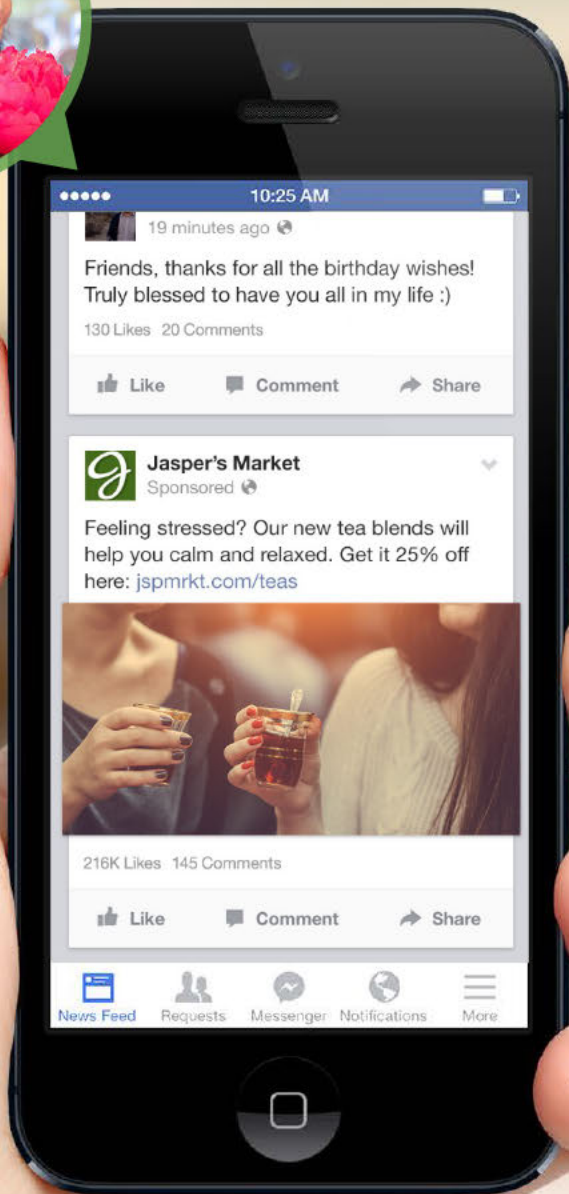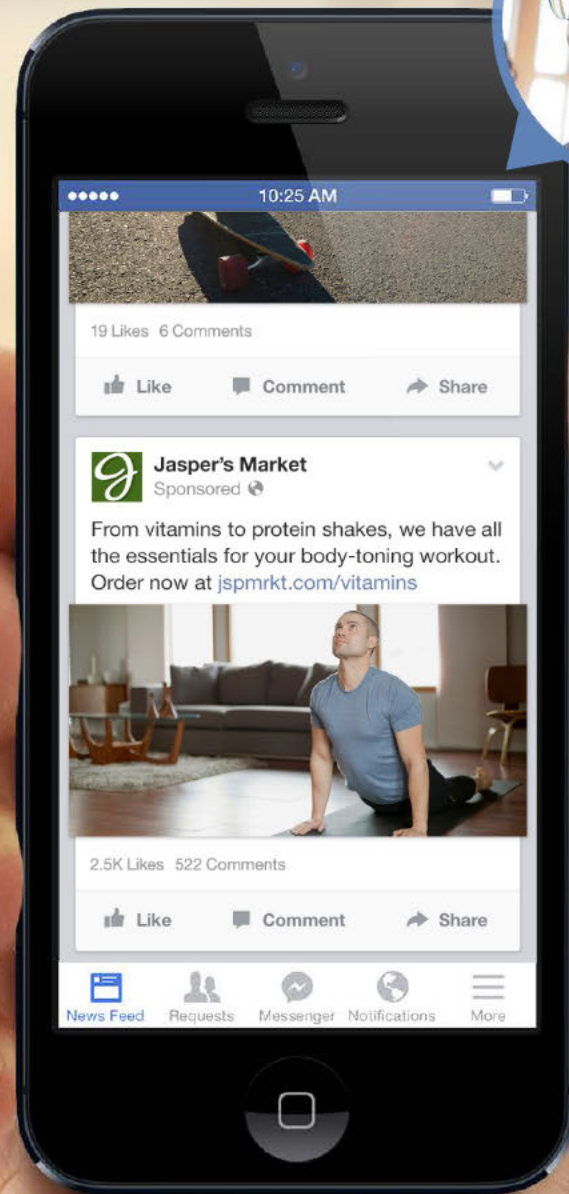
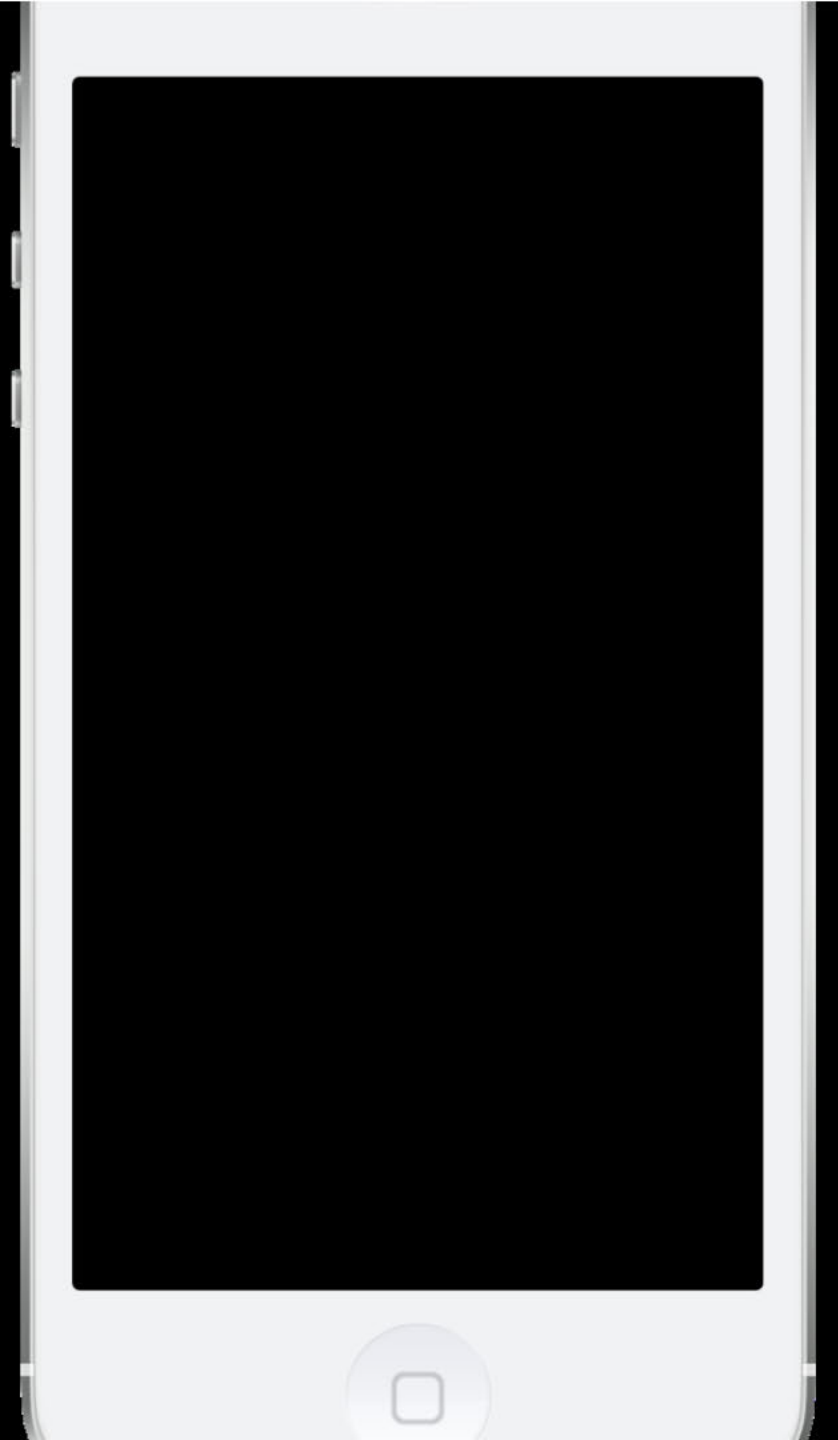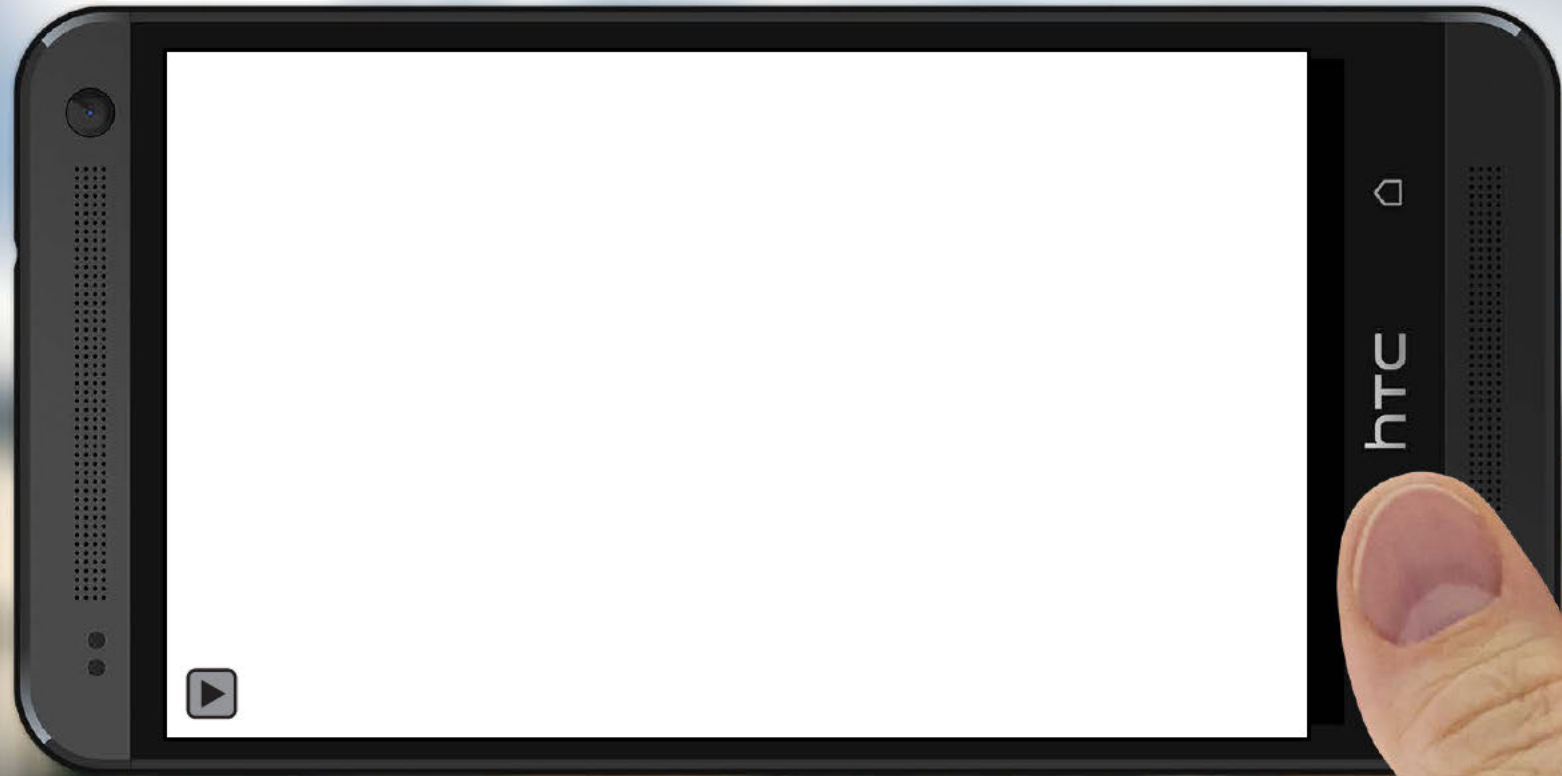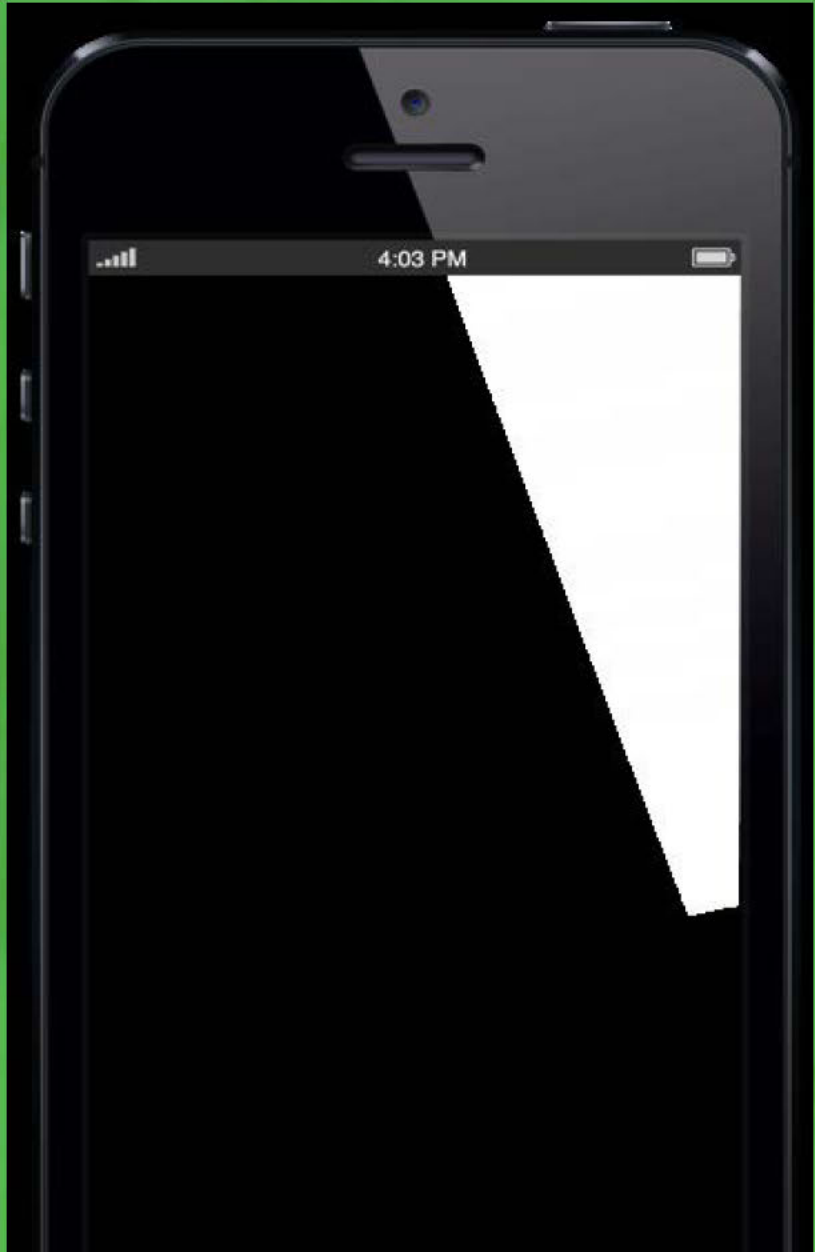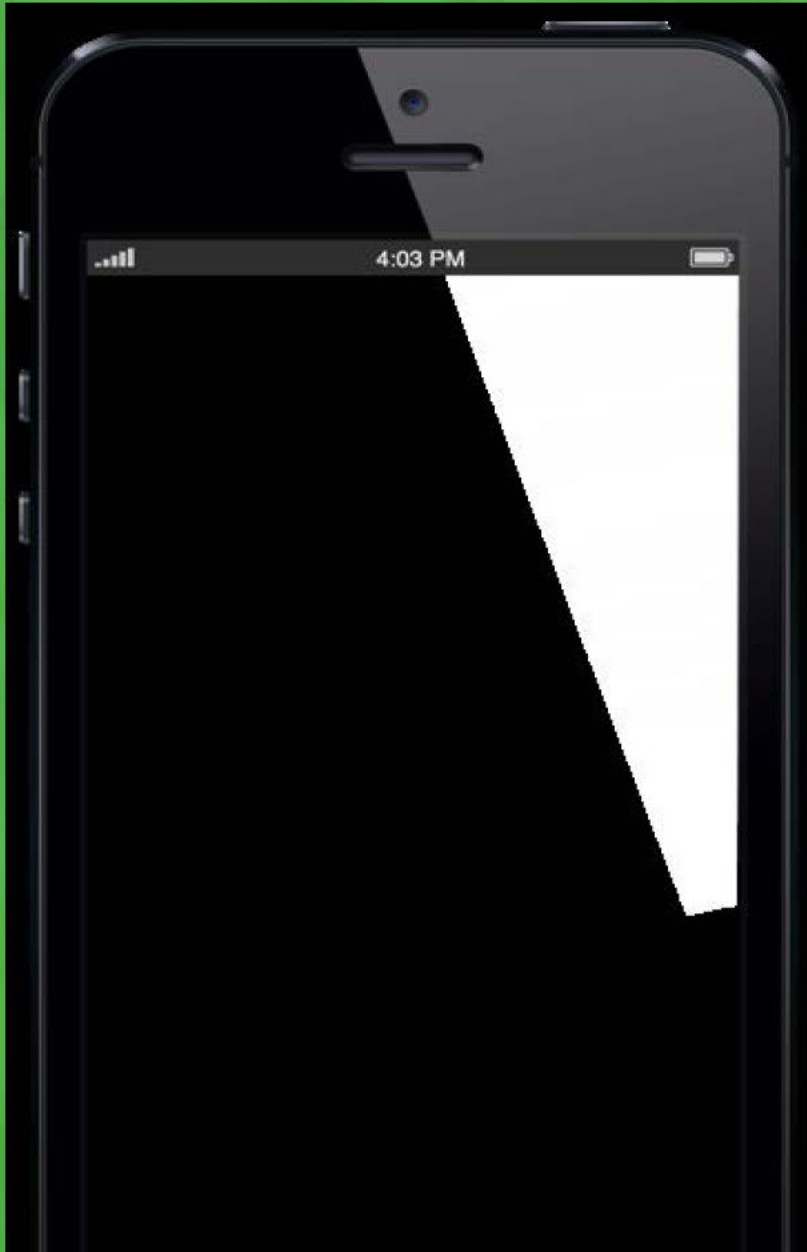Consumers have more

CONTROL

than ever before

Lianne's News Feed

Lee's News Feed
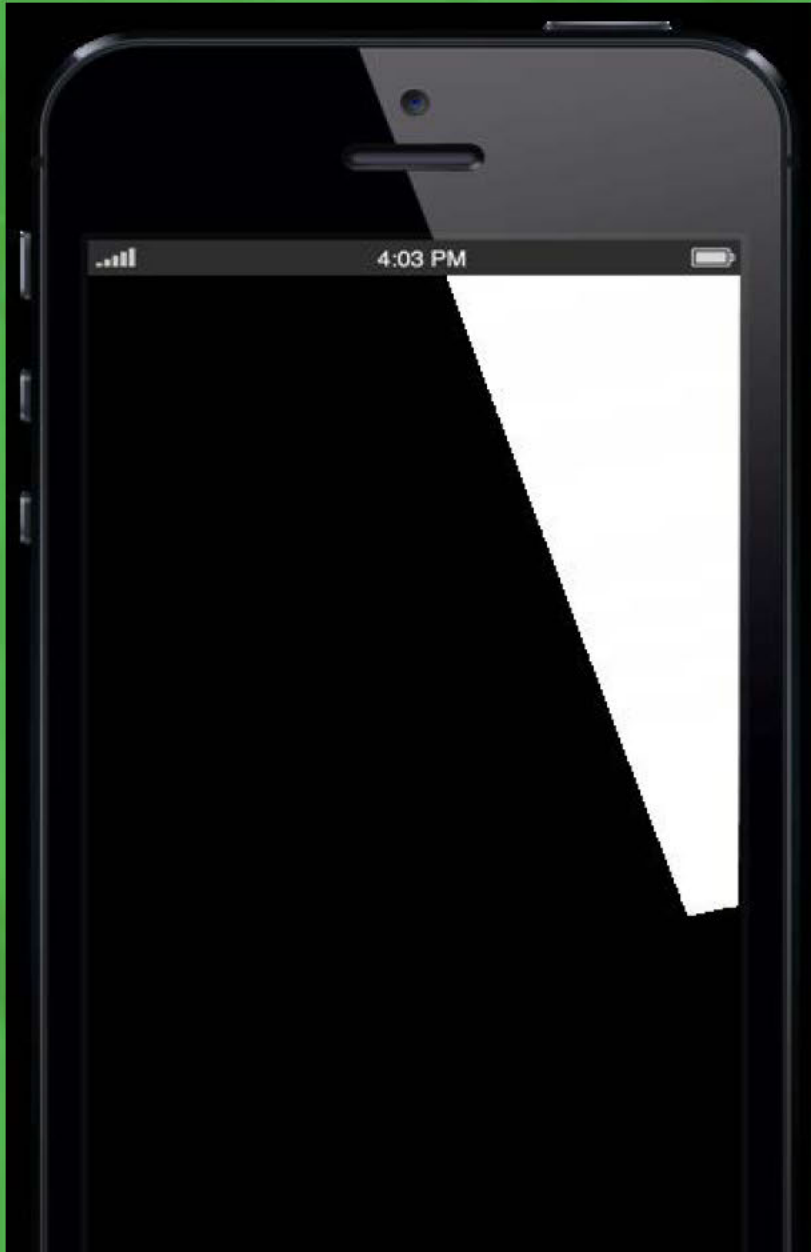
Thank You

Networking Break

The Shift to Smartphone Dominance

David Iudica
Director, Strategic Insights and Research
Yahoo!

OmnicomGroup

THE SHIFT TO

SMARTPHONE DOMINANCE

YAHOO!

Background

To understand mobile migration patterns and which factors will accelerate the shift to a mobile-first world for consumers and advertisers
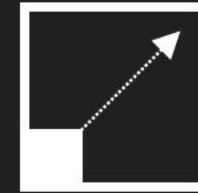
WHAT'S COVERED

Rapid Adoption:

What are the drivers impacting the pace of smartphone ownership?

Thinking Beyond Ownership:

Now the majority of consumers own a smartphone, but so what?

Factors expediting the shift:

How should advertisers and publishers be building for a mobile majority first world?

FLURRY | YAHOO!

Methodology: Quantitative + Analytics

US: 2,768

UK: 1,010

FR: 1,011

GR: 1,016
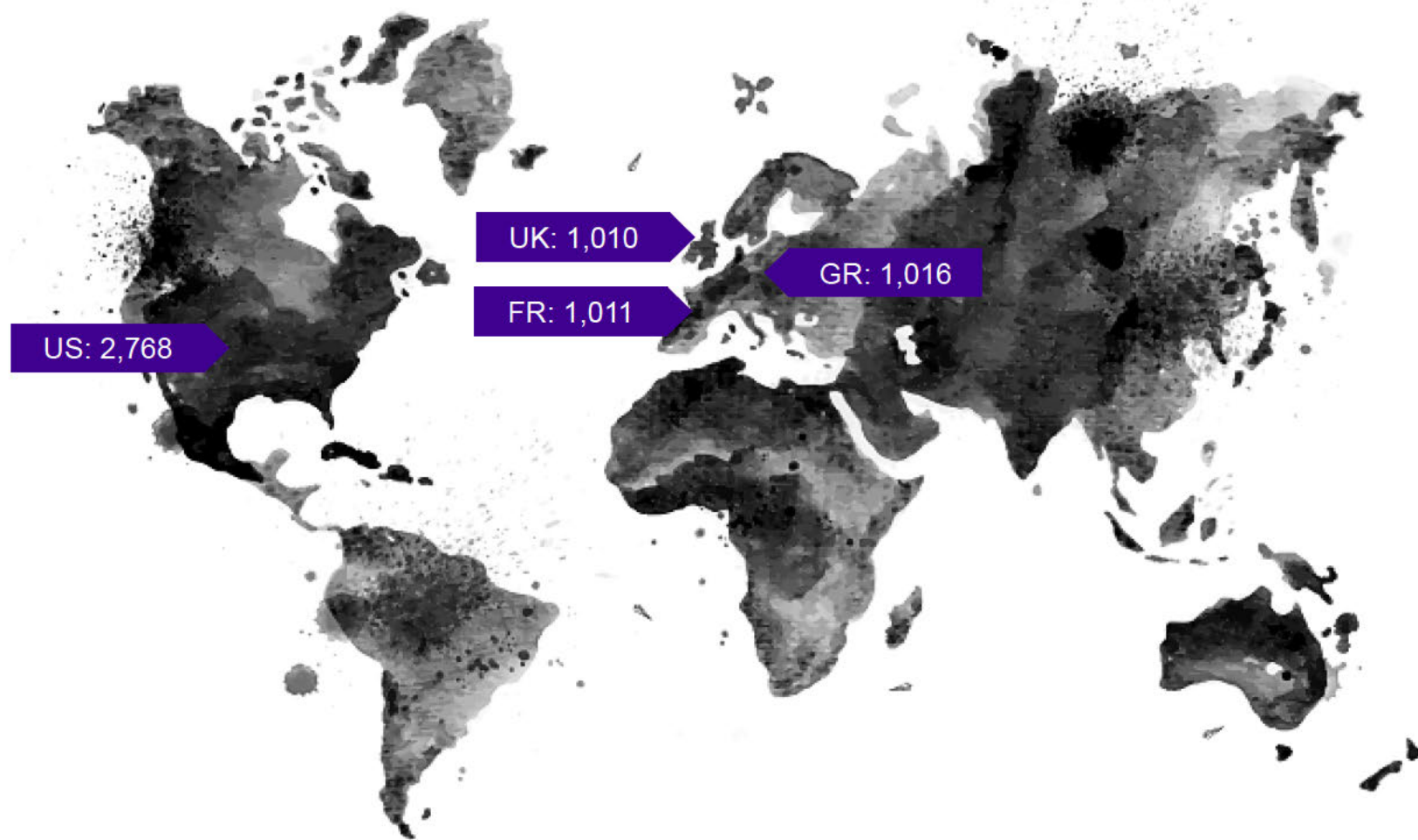
WHO
- 5,805 18-64 year old smartphone owners
- Data population and ownership

Vital Findings

WHEN
January 2015

WHAT
30-minute online survey

FLURRY ANALYTICS
Aggregated All Global Data from January 2015
- 600K apps
- 250M phones
- 1/3 of all app opens

FLURRY | YAHOO!

The adoption curve for modern conveniences has shortened considerably

Adoption curve since 1900

ADOPTION CURVE FOR MODERN CONVENIENCES

100

50

COLOR TV

ELECTRICITY

CLOTHES WASHER

COMPUTER

AIR CONDITIONING

TELEPHONE

CELL PHONE

CLOTHES DRYER

DISHWASHER

VCR

STOVE

AUTO

RADIO

FRIDGE

MICROWAVE

INTERNET

1900   1915   1930   1945   1960   1975   1990   2005

Source: Visual Economics

FLURRY YAHOO!
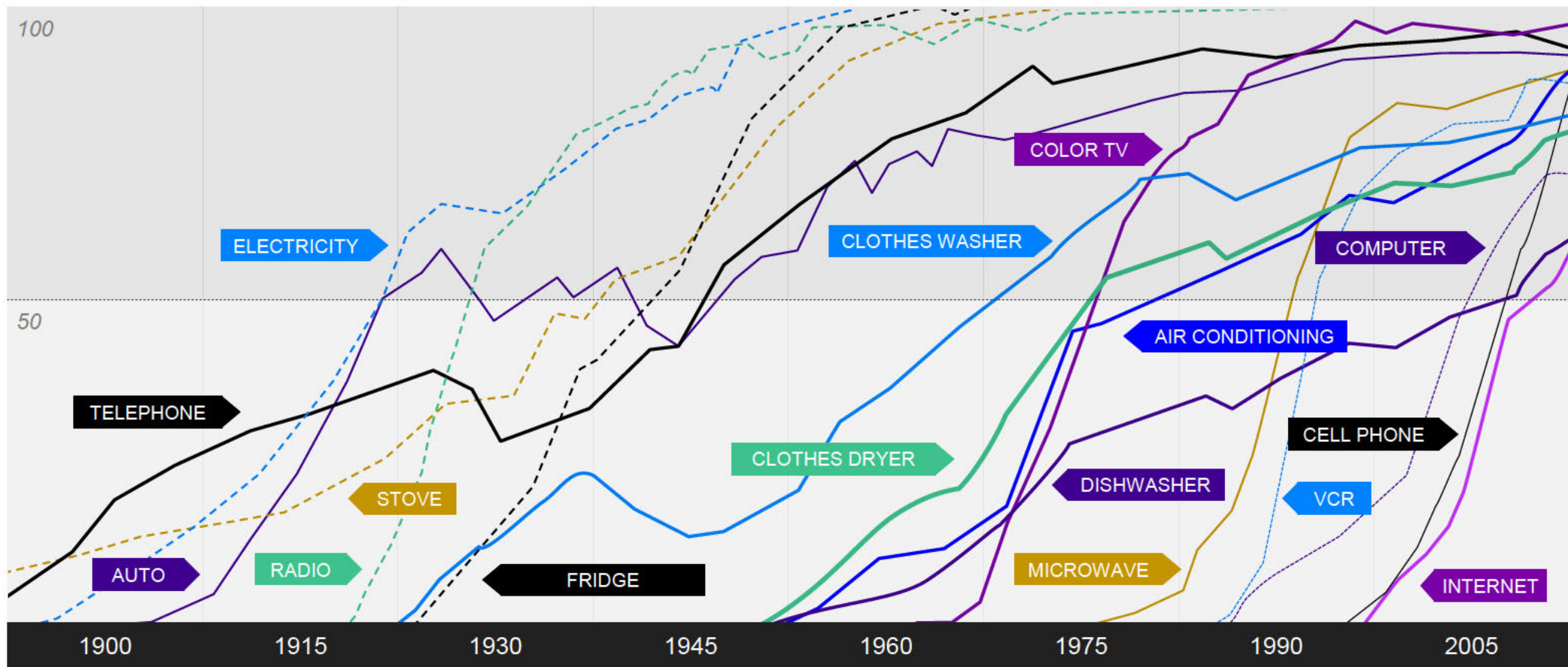
The speed of smartphone adoption can be attributed to the multiple products it has replaced

REPLACEMENT CYCLES FOR ELECTRONICS PRODUCTS

PRODUCT	AVG. LIFE (YEARS)
Cordless telephone	8
Color TV	8
CD Player	6
Telephone answering machine	6
VCR	5
Camcorder	5
Fax	4
PC	2
Mobile Phones	1

FLURRY YAHOO!

Mobile industry revenue rivals GDP of the world's largest countries

Country GDP in $Trillions
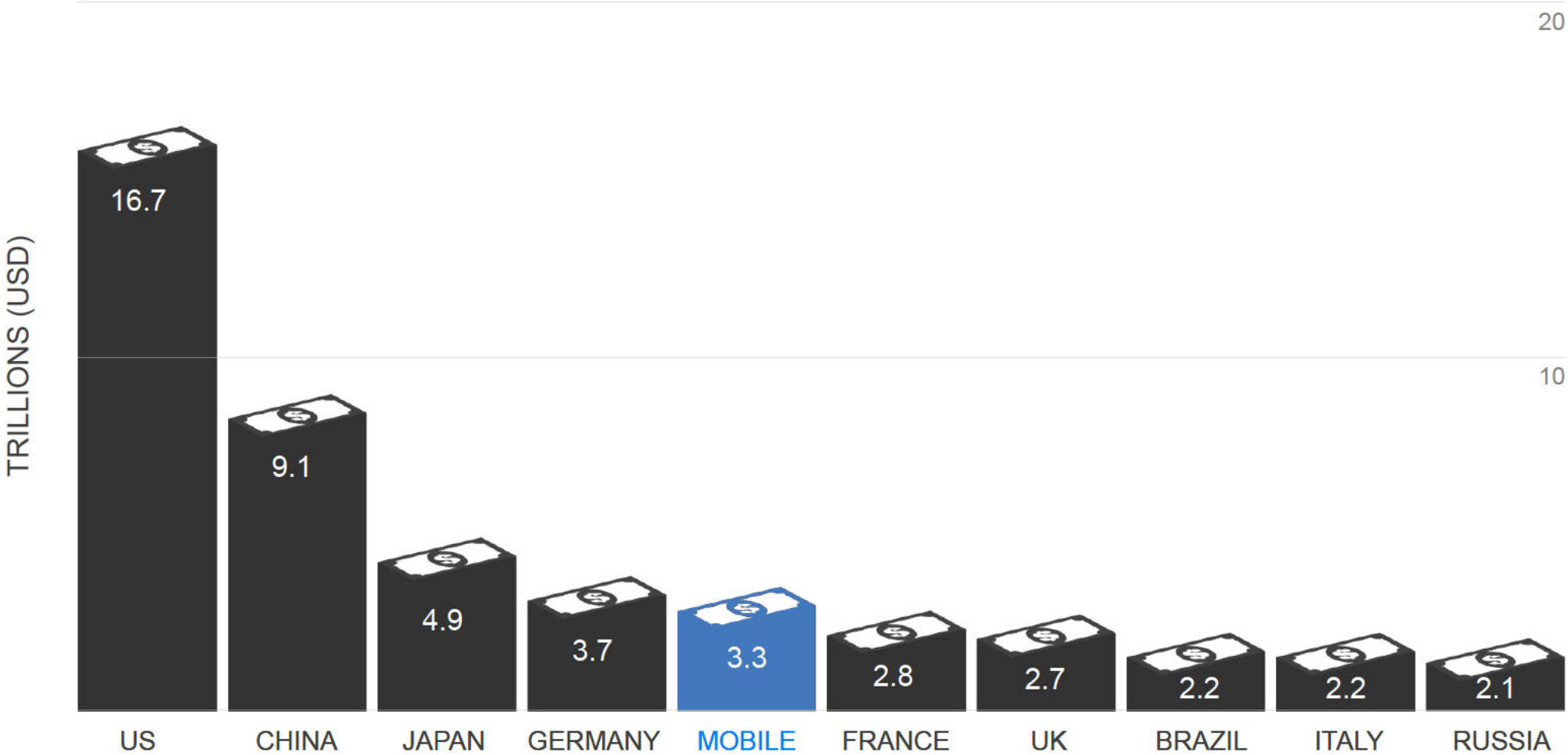
What does a
Smartphone Dominant
consumer look like?

Users who spend most of their times on their smartphones, and are using them to replace their PC

MOBILE FIRST.

67% state that their smartphone replaces their PC, & is the main way they access the internet
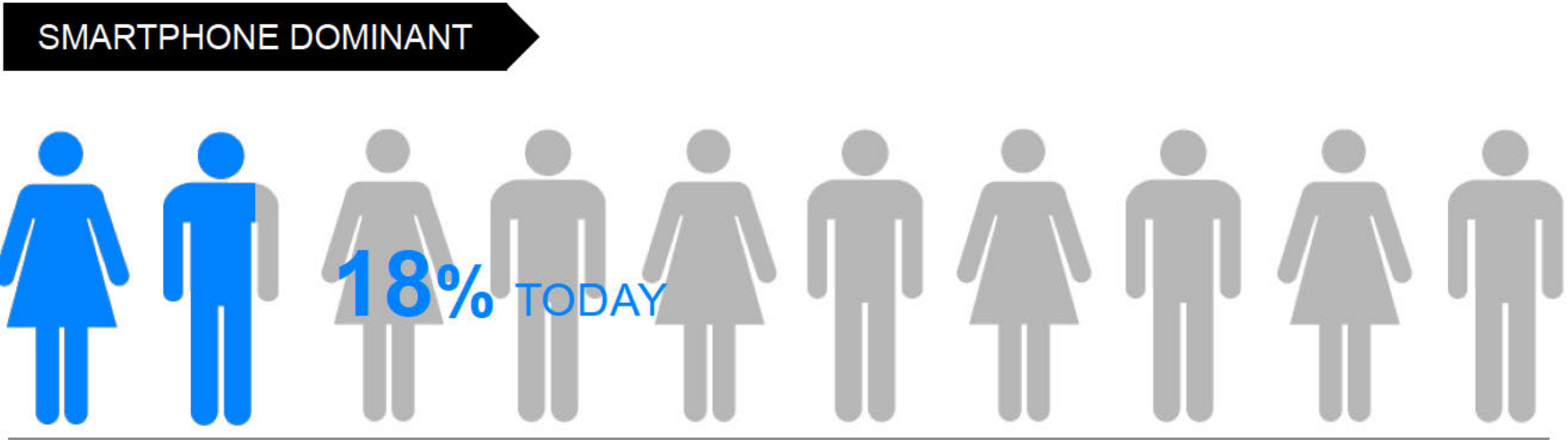
MOBILE LEAD.

75% of their digital time is a mobile device;
+50% vs. an average smartphone owner

MOBILE IMMERSED.

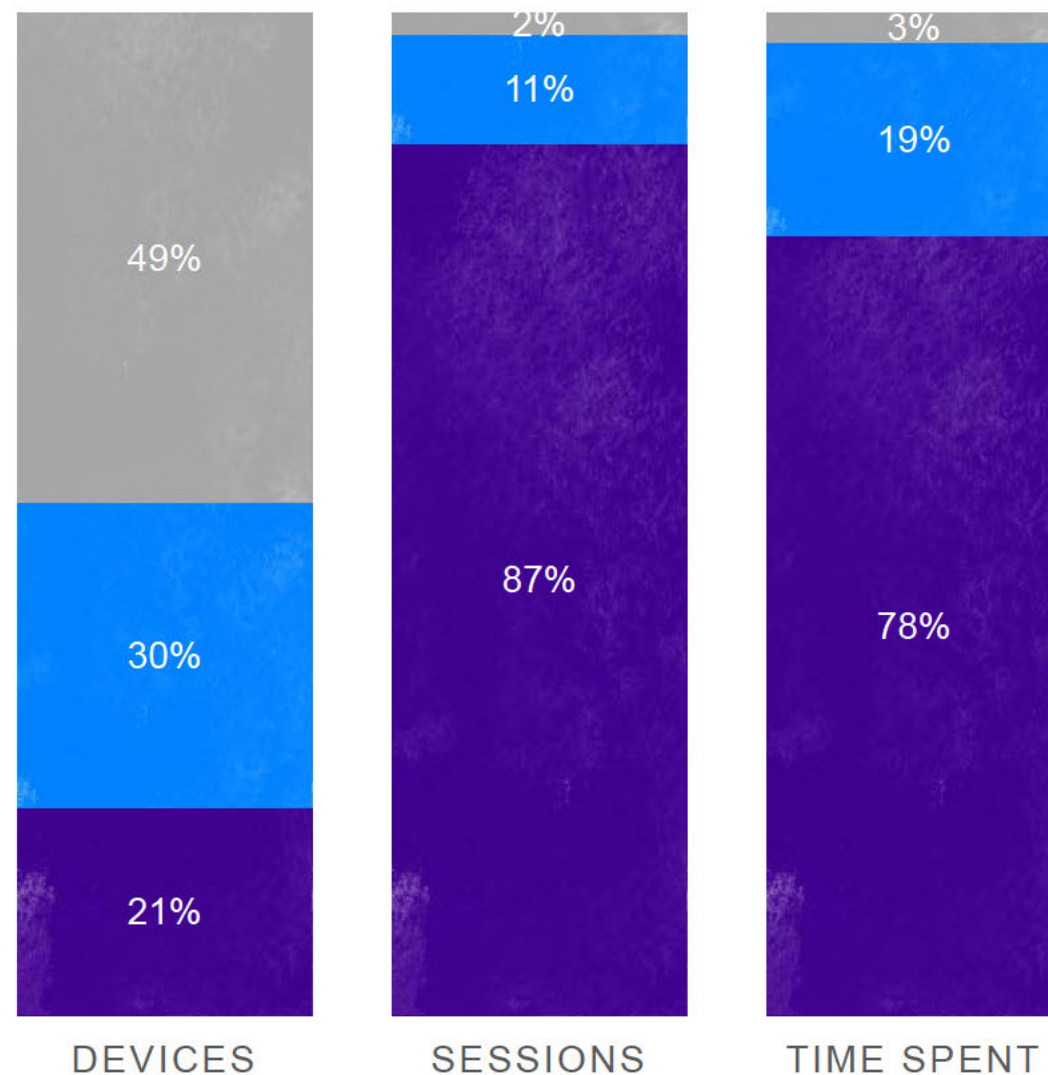**+50%** more activities done on a mobile devices vs. an average smartphone owner

Currently, 1/5 of users are Smartphone Dominant

SMARTPHONE DOMINANT

18% TODAY

The heaviest 20% dominate sessions and time spent on mobile devices

DEVICE USAGE

- ⬜ Light
- 🟦 Medium
- 🟪 Heavy: Smart Phone Dominant

DEVICES
- 49%
- 30%
- 21%

SESSIONS
- 2%
- 11%
- 87%

TIME SPENT
- 3%
- 19%
- 78%

FLURRY | YAHOO!
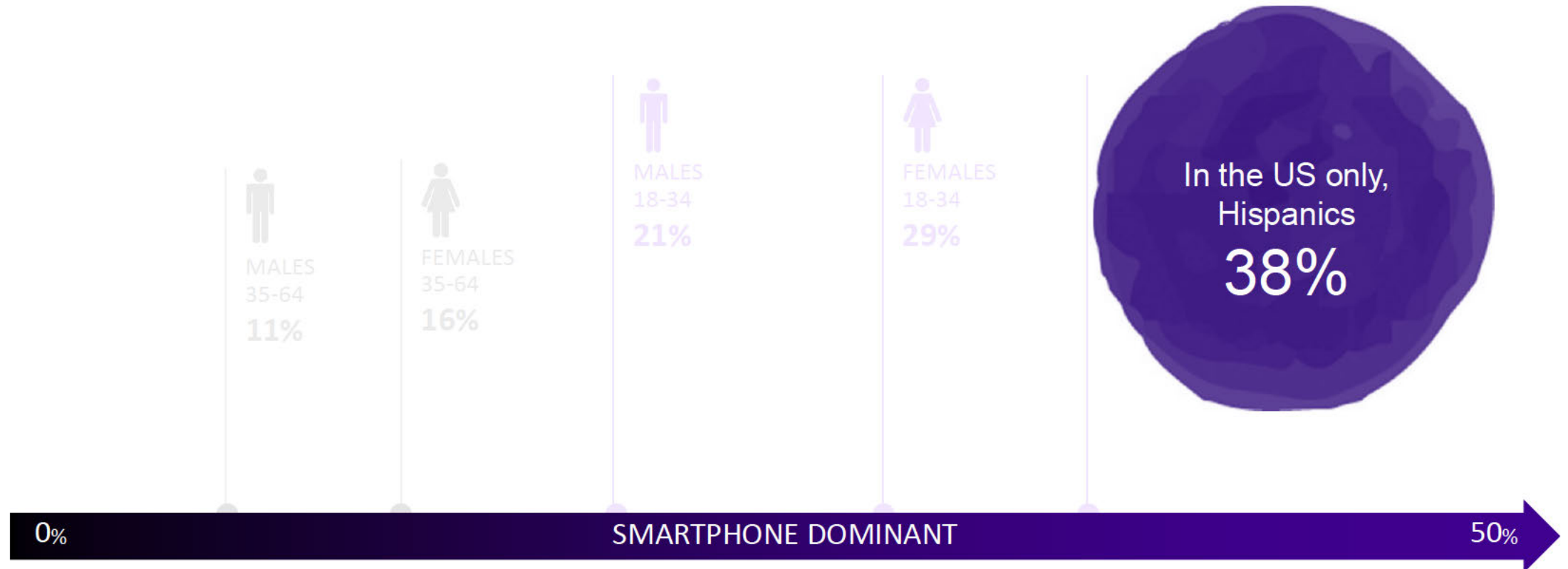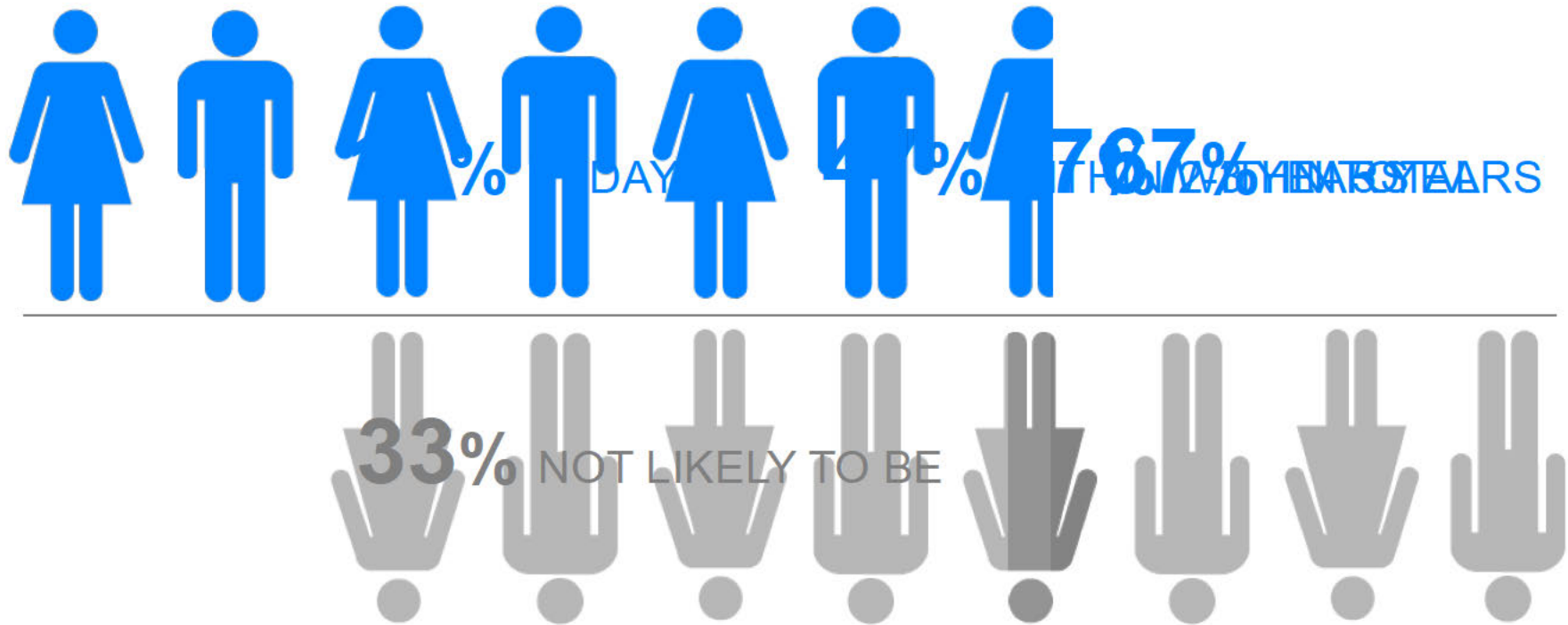
Factors that will expedite the shift to a mobile lead world

| Developing for larger screens | Creating experience for cross-screen, not mobile only | Adapting to trends in the app revolution |

More efficient, better user experiences will accelerate the shift to Smartphone Dominance

Factors that are holding back consumers from being Smartphone Dominant
Among Future Smartphone Dominant Users

7

It's
thin
tha

User Experience
(easier to type, read, easier
to browse/compare)
67%

Data & Internet
Improvements
54%

Better Apps
44%

As screen sizes grow, engagement will increase

Average time spent per session | Minutes

ABLETS
.74 MIN

SMA

The Industry responded with more Phablet choices
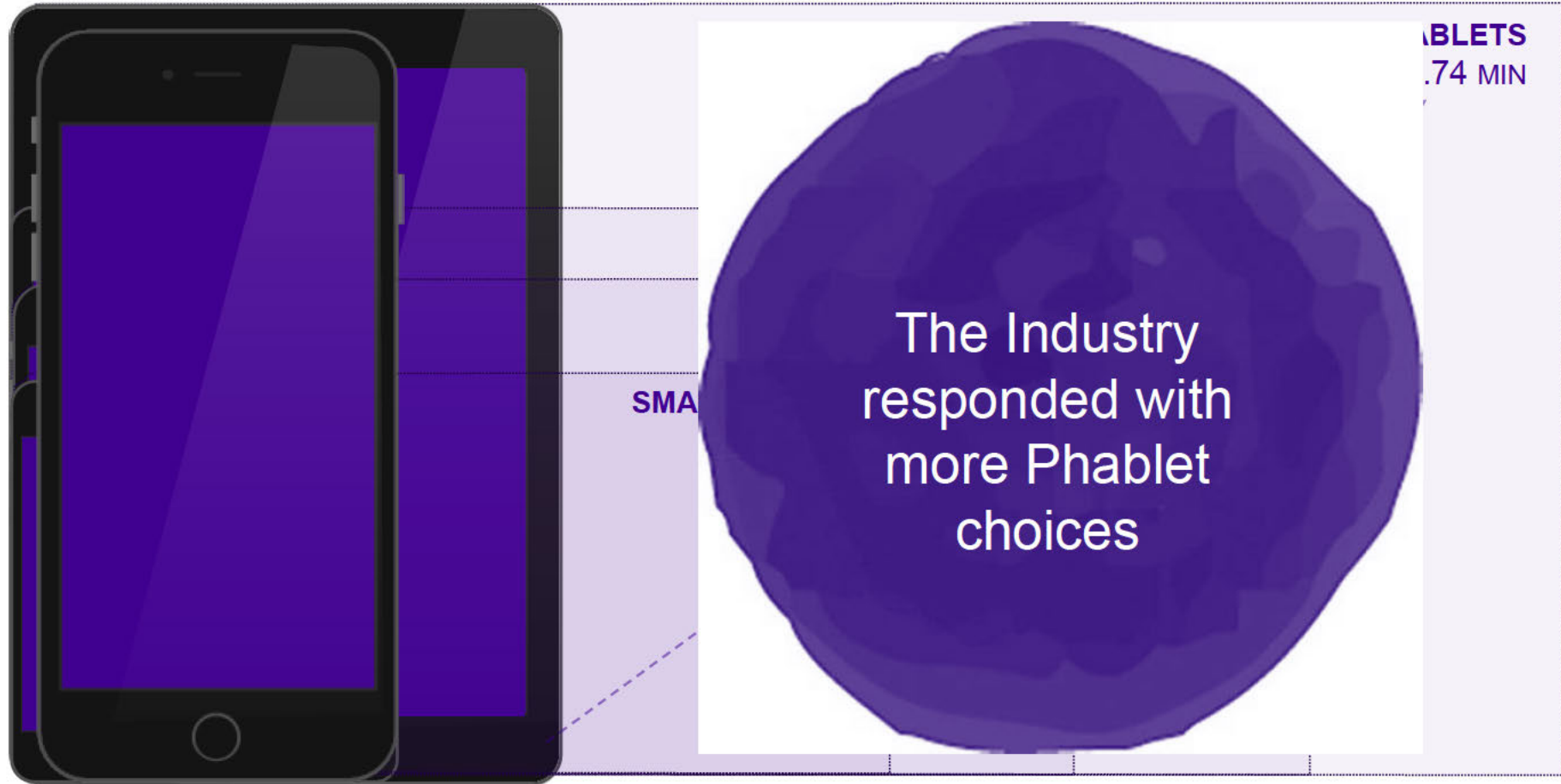
FLURRY | YAHOO!

Phablets are the fastest growing device

% Growth in usage (Jan 2014-2015)
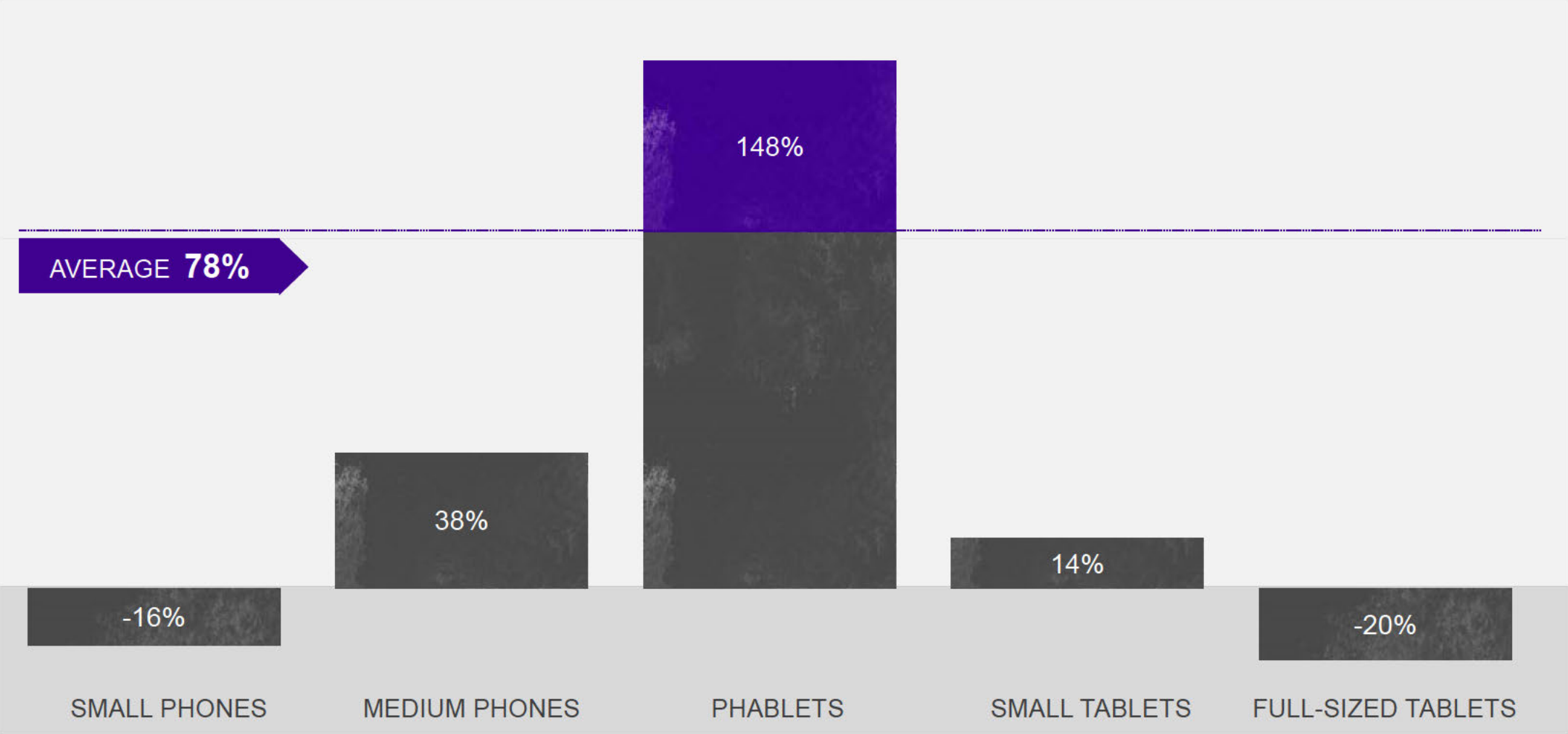
AVERAGE **78%**

SMALL PHONES	MEDIUM PHONES	PHABLETS	SMALL TABLETS	FULL-SIZED TABLETS
-16%	38%	148%	14%	-20%

FLURRY | YAHOO!
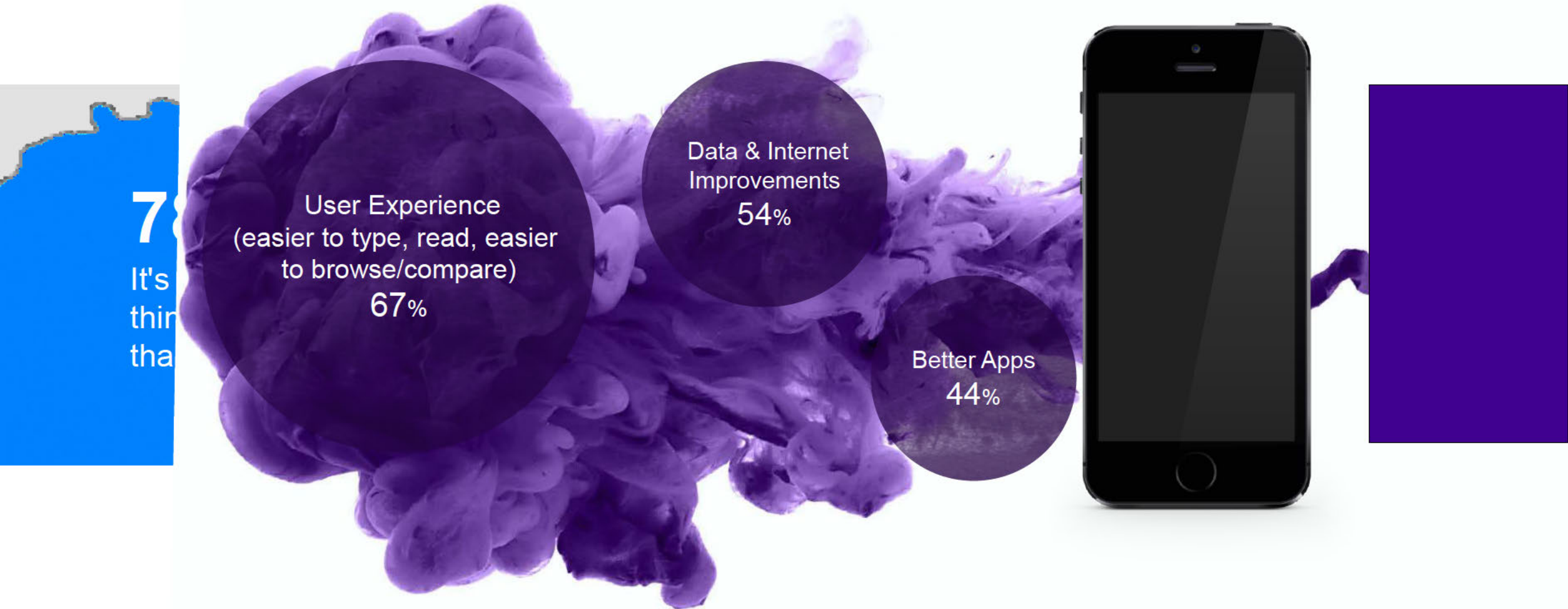
Factors that will expedite the shift to a mobile lead world

| Developing for larger screens | Creating experiences for cross-screen, not mobile only | Adapting to trends in the app revolution |

Smartphone Dominant users want digital experiences to go across devices
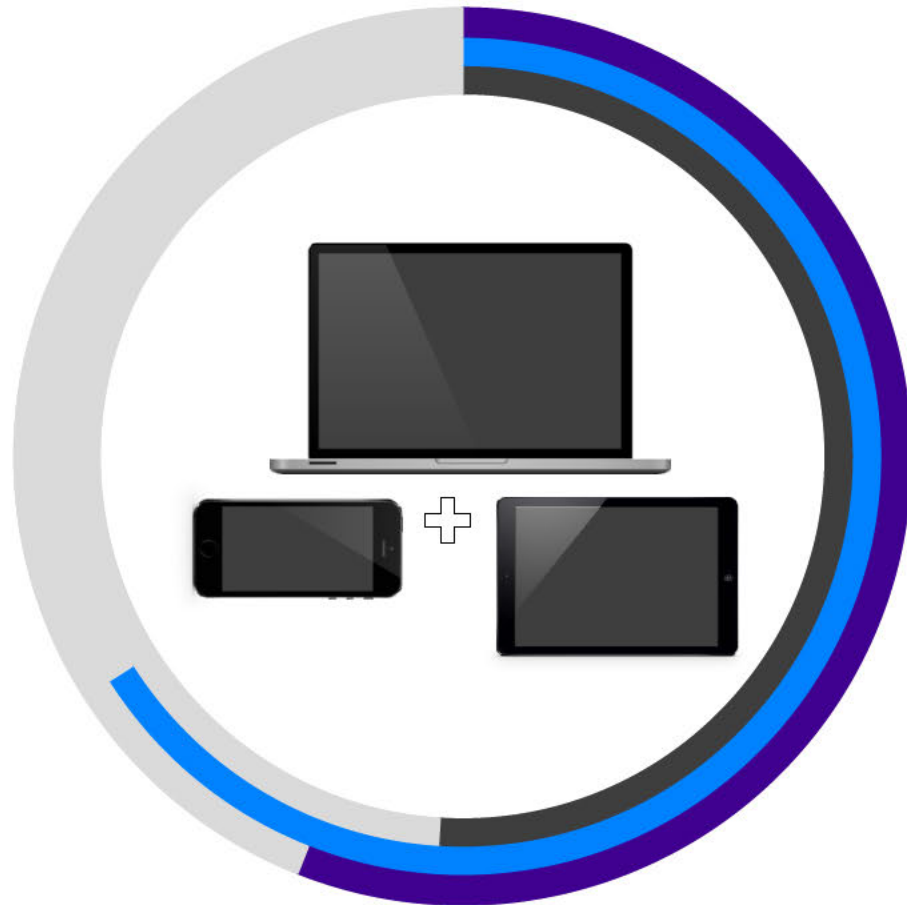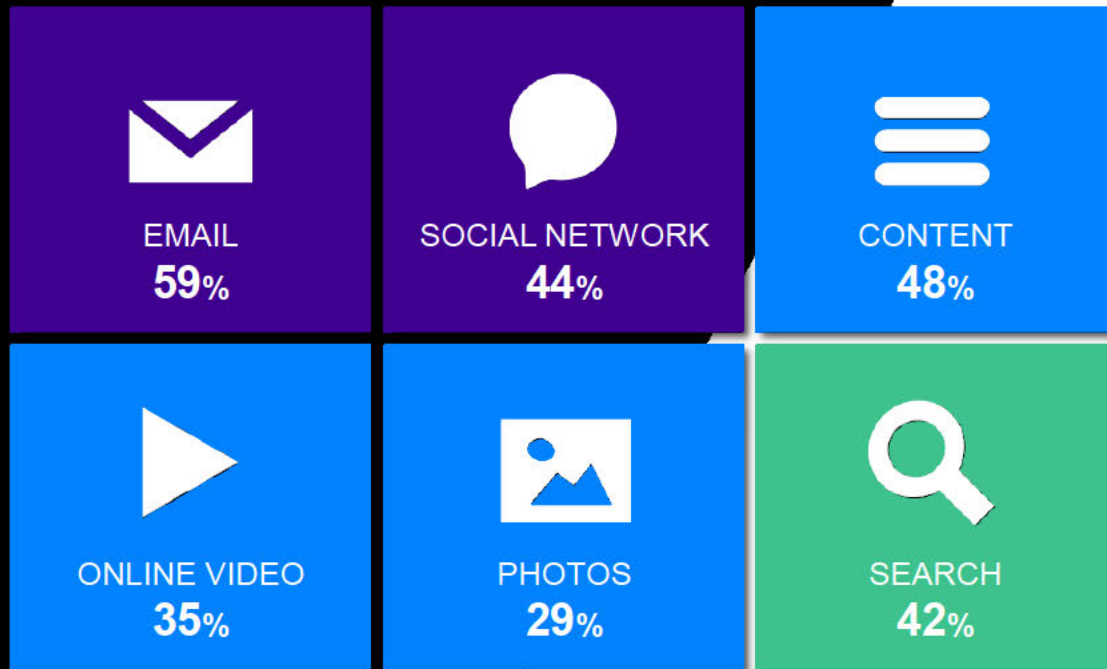
% Smartphone users agree

"I'm using multiple devices at the **same time more often** than I did in the past"

51% TOTAL

66% CURRENT SD

56% FUTURE SD

FLURRY | YAHOO!

Communication, content & search related activities currently span across devices most

Sequential Experience Activities For Any Device – Mobile, Tablet & PC
Among those who had a sequential activity

EMAIL
59%

SOCIAL NETWORK
44%

CONTENT
48%

ONLINE VIDEO
35%

PHOTOS
29%

SEARCH
42%

OTHER MENTIONS

Banking

Shopping

Playing games

Streaming music

Using an IM or

Work/school

Finding directions/using GPS   20%
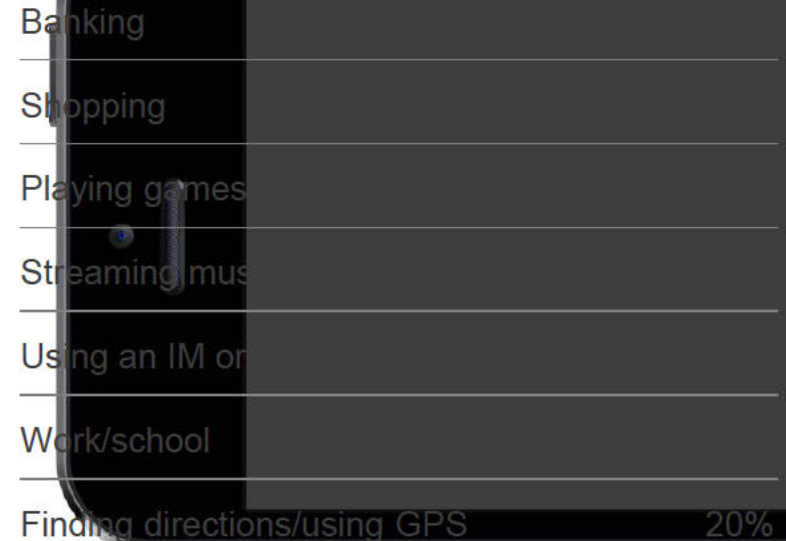
Factors that will expedite the shift to a mobile lead world

Developing for larger screens
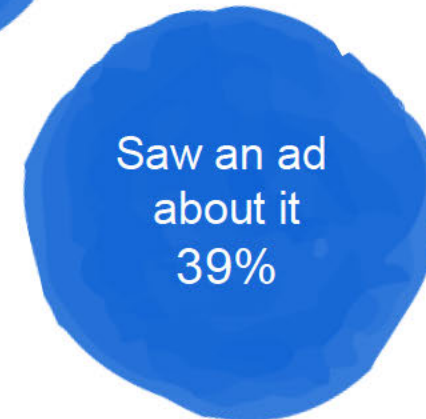
Recognizing that it's cross screen, not mobile only

Adapting to trends in the app revolution

Task-based apps and replacing an existing app are top reasons users download new apps

■ Motivations to download apps | Among Total

■ How did you hear about these apps | Among Actively Downloading

I need it for a specific task
53%

Replace an existing app
49%

Friend told me about it
41%

Read about in an article
39%

Saw an ad about it
39%
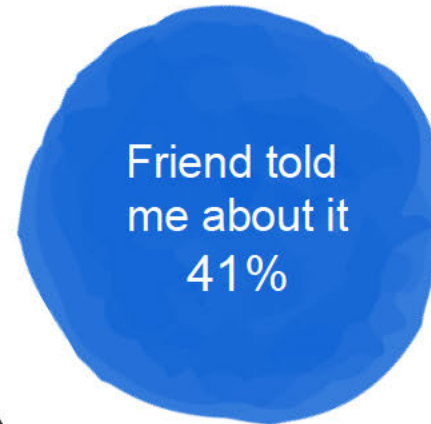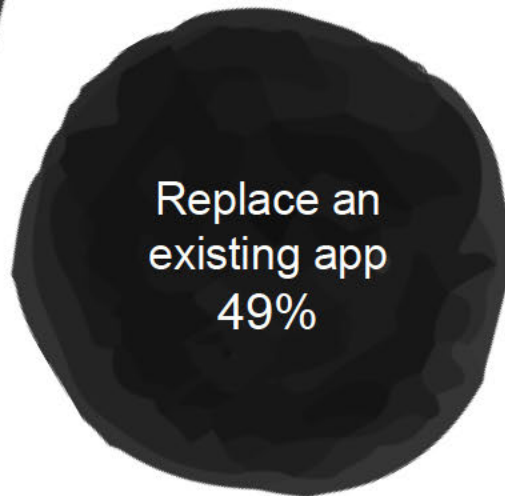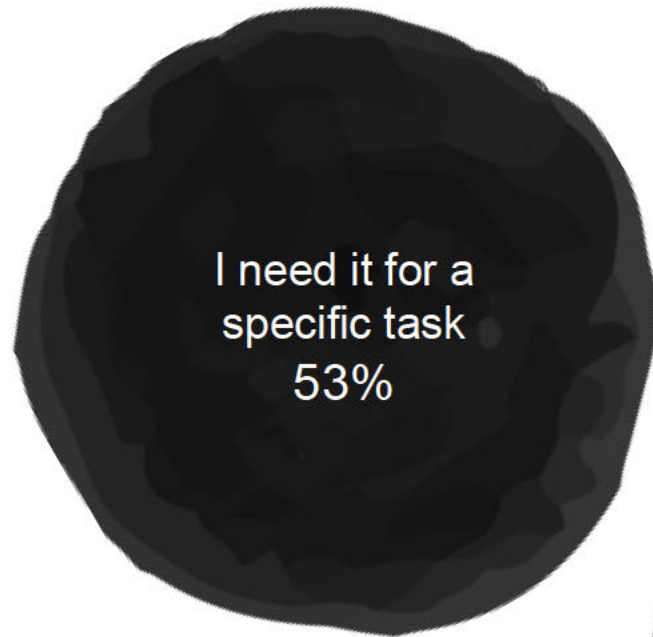
App replacement is done by ~1/2 of Smartphone Dominant users each week

I'm replacing apps currently on my device

Notable Quotable

"I am searching for apps that might replace some of the apps I currently have on my phone…"

A FEW TIMES A **WEEK OR MORE**	
TOTAL	34%
CURRENT SD	44%
FUTURE SD	43%

AT LEAST **ONCE A MONTH**	
TOTAL	52%
CURRENT SD	64%
FUTURE SD	62%

FLURRY | YAHOO!

Growth in sessions is driven by lifestyle, productivity and messaging apps

Changes in annual growth in app usage | Sessions

- LIFESTYLE & SHOPPING — 171%
- UTILITIES & PRODUCTIVITY — 116%
- MESSAGING — 100%
- HEALTH & FITNESS — 88%
- TRAVEL — 87%
- SPORTS — 74%
- NEWS & MAGAZINES — 48%
- MUSIC, MEDIA & ENTERTAINMENT — 32%
- GAMES — 28%

AVERAGE **76%**
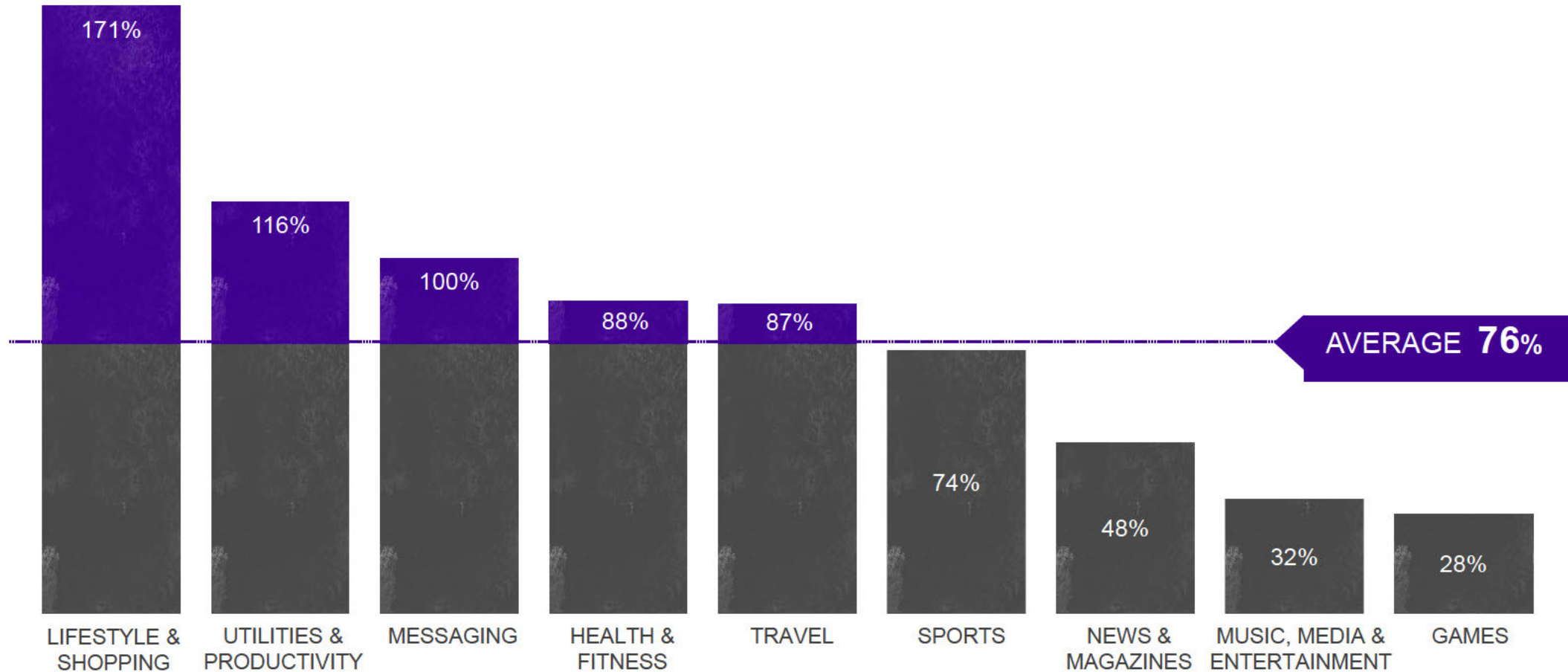
FLURRY YAHOO!

However, what will move media experiences even further is phablet ownership

% Growth in category usage % over index

■ All device types ■ Phablets
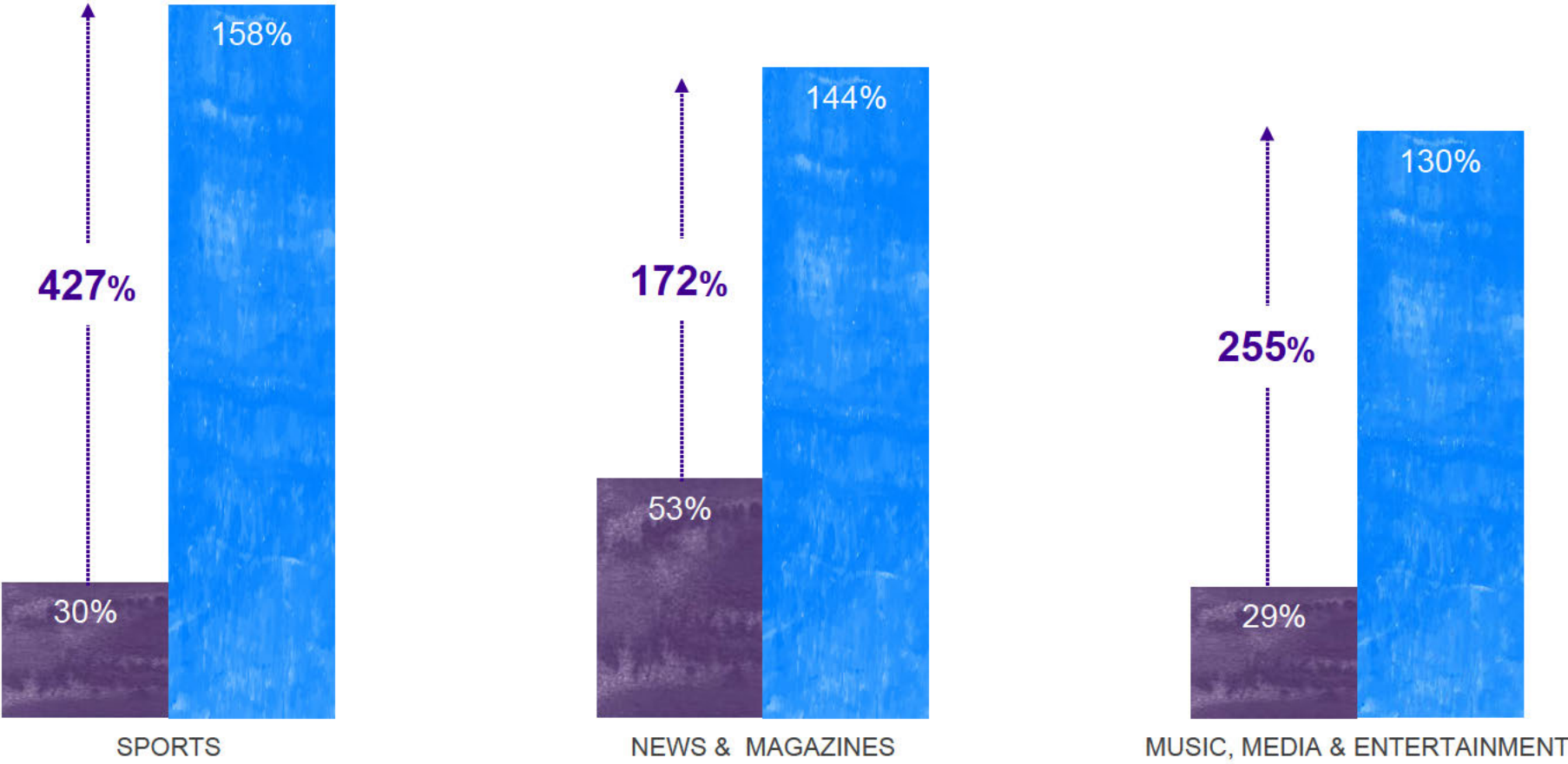
427%

158%

30%

SPORTS

172%

144%

53%

NEWS & MAGAZINES

255%

130%

29%

MUSIC, MEDIA & ENTERTAINMENT

FLURRY | YAHOO!

WE ARE JUST AT THE BEGINNING.

In the next 5 years, 71% of Future Smartphone Dominant users will migrate and make mobile first

This group will expand throughout the next 5 years to include all demographics, not just the early adaptors: Millennials, parents with young kids or Hispanics

DEVELOPING EXPERIENCES FOR LARGER SCREENS.

Bigger screens sizes drive mobile engagement. They also offer opportunity for more viewable & engaging experiences to develop around

IMPROVING CROSS DEVICE EXPERIENCES.

Communications, content, and search are the biggest opportunities as 2/5 of all smartphone owners already attempt to port experiences across multiple devices

ADAPTING TO TRENDS IN THE APP REVOLUTION.

Apps are where digital time is spent & app replacement is what is driving app downloads. Developers of experiences need to think about iteration, innovation and marketing to drive trial

IMPLICATIONS

MORE SPACE.
When building a mobile strategy, companies should account for the rapid adoption of larger phablet devices. More space = more ways to connect with your user. Native ad formats account for this size naturally and beautifully

INTEGRATED MOBILE BUDGETS.
Mobile ad budgets should not be thought in isolation. With 2 in 5 consumers crossing devices daily, siloed mobile budget should evolve to larger cross-device buys. Native advertising, specifically, which runs on responsive design, is a must-buy that creates that efficiency and ease for marketers

CONSTANT ITERATION & INNOVATION.
In order to be a major player in the app game, the messaging to drive your app trial must evolve as consumers are constantly replacing apps. Message what's *innovative* & *better*, not what's necessarily new

GET THE WORD OUT.
In order to drive app downloads and app adoption, developers & companies need to have a multi-pronged marketing strategy that includes: paid advertising, creates opportunities through content marketing through articles, and ultimately drives WOM

Quick Fire Case Studies
Tech Partner & Agency

Ben Dietz
SVP, Head of Sales
VICE

Oliver Laubscher
SVP, Business Development
VICE

IN THE VOICE OF THE AUDIENCE

FREE. AND EVERYWHERE.

VICE

CULTURE, ENTERTAINMENT, NEWS

VICE NEWS
NEWS

MOTHERBOARD
TECHNOLOGY

VICE SPORTS
SPORTS

MUNCHIES
FOOD

FIGHTLAND
MMA CULTURE

noisey
MUSIC

the creators project
ART
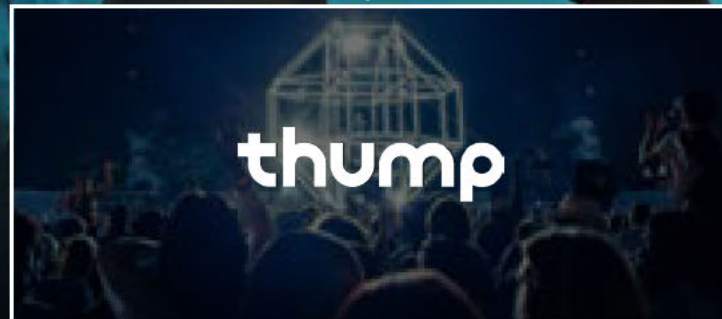
thump
ELECTRONIC DANCE MUSIC

FASHION

PLATFORM ECOSYSTEM

Long Form & Documentaries

Media Inventory

Innovative Technologies

Short Form Series

Branded Content

Editorial Features and Columns

Well-known Contributors, Talent, and Influencers

Launch Events & PR

MUNCHIES · VICE · VICE NEWS · MOTHERBOARD · VICE SPORTS · thump · the creators project · Broadly · noisey · i-D · FIGHTLAND / UFC · VICE DIGITAL NETWORK
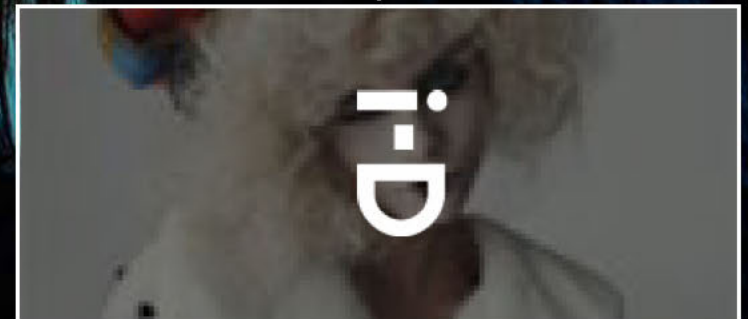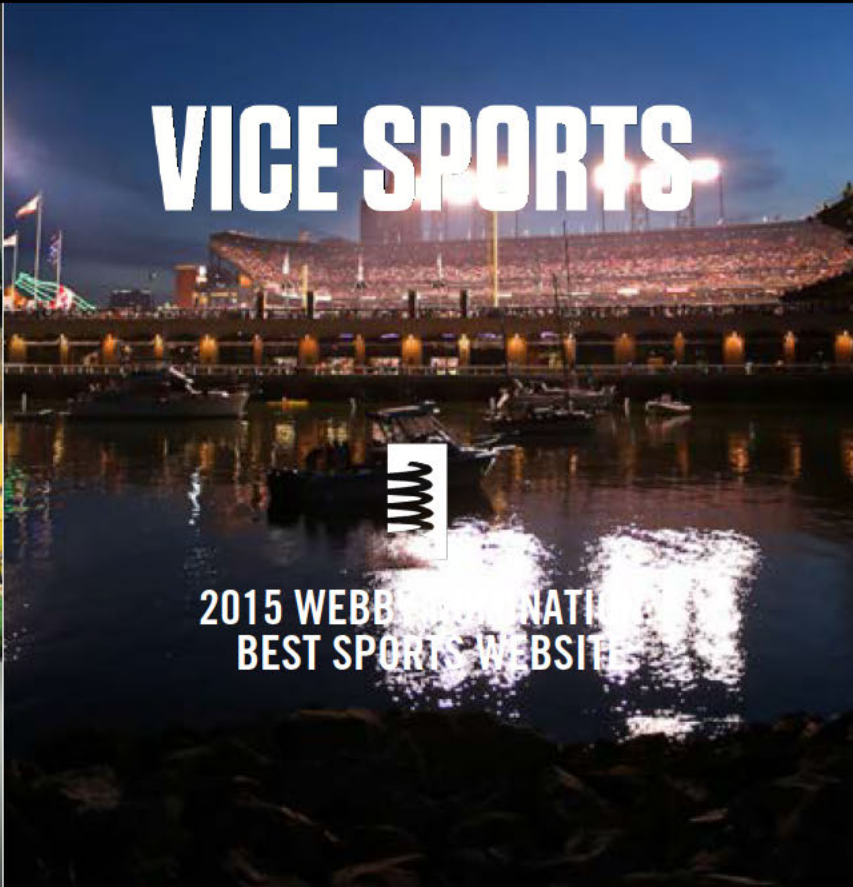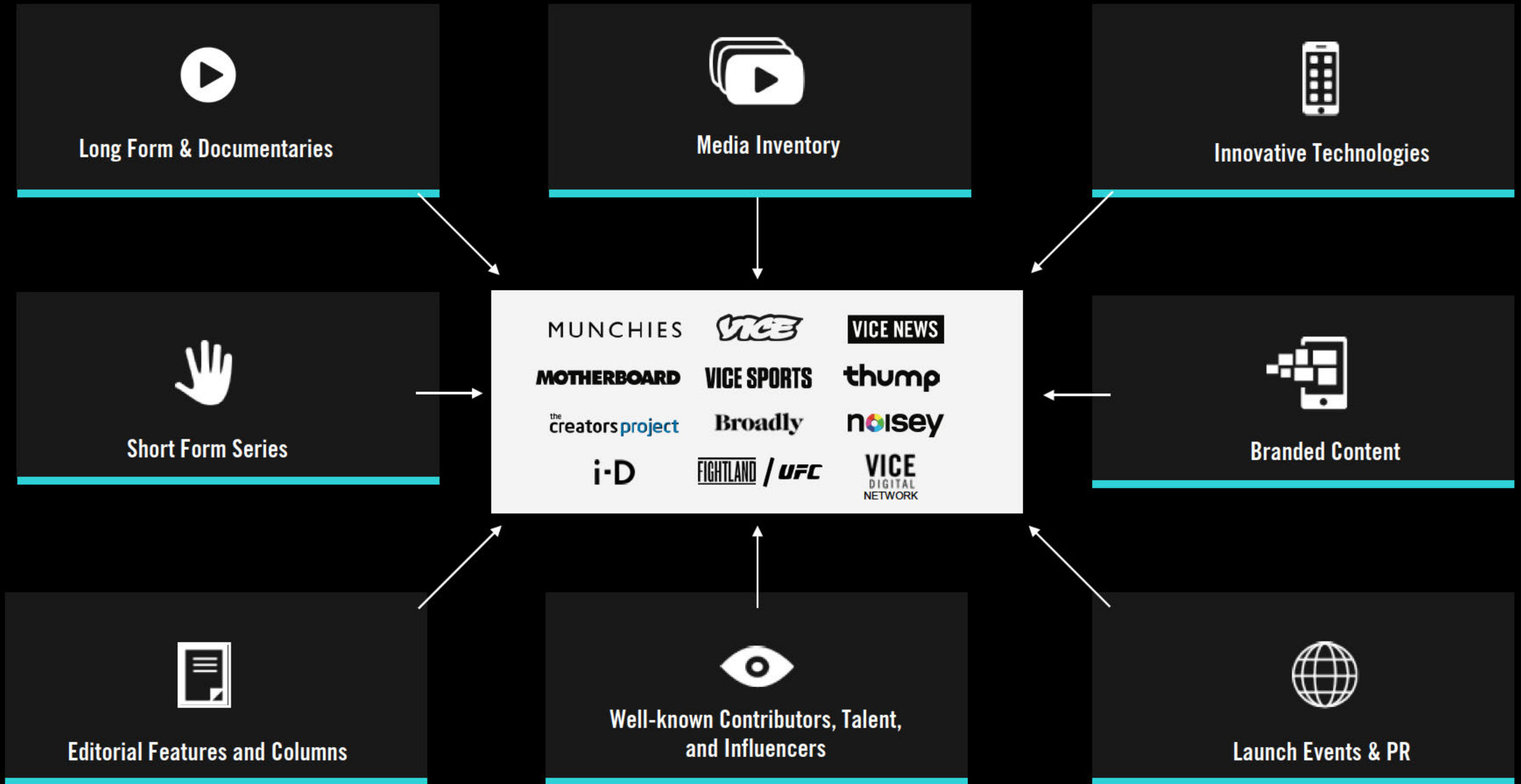
EXPANDING FOOTPRINT, CAPABILITIES AND PARTNERSHIPS

MIAMI OFFICE

DOUBLING STAFF

HIRING EXECUTIVES

LIVE NATION TV

ROGERS PARTNERSHIP

EXPANDING OUR PRODUCTION ECOSYSTEM

PULSE

PRODUCTION

A+E NETWORKS

VICE TV

carrot creative

DIGITAL
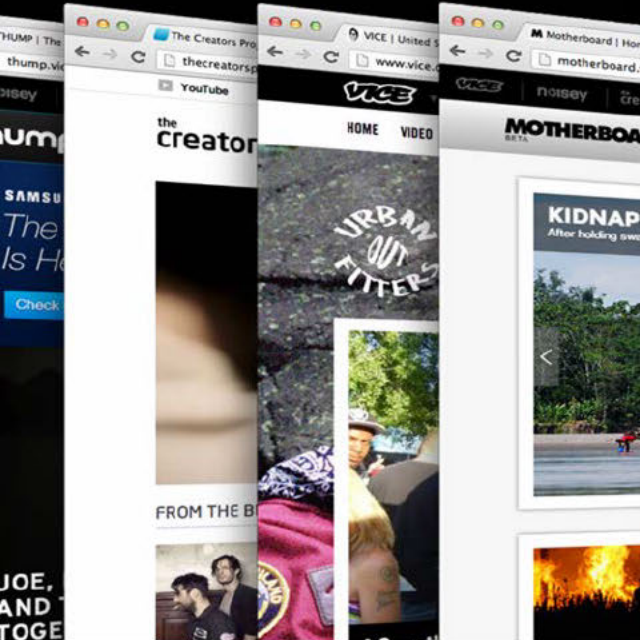
THIS YEAR

Broadly.

TRAVEL

WHAT'S NEXT?

GAMING

HEALTH

WAYS TO WORK WITH VICE IN 2015

1

MEDIA & ADVERTISING

ADVERTISING TARGETED TO THE
CRUCIAL MILLENIAL DEMOGRAPHIC

2

CONTENT SPONSORSHIP

SPONSORSHIP OF VICE MEDIA
ORIGINAL PROGRAMMING

3

BRAND-OWNED CONTENT

BRAND-OWNED CONTENT BUILT ON KEY BRAND
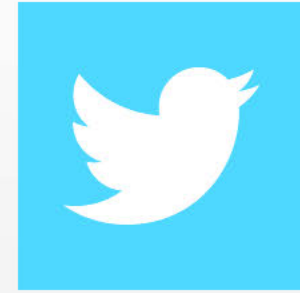ATTRIBUTE, IN VICE'S SIGNATURE VOICE

4

INTEGRATED PROGRAMS

DEVELOPMENT OF CO-BRANDED CONTENT
OR STANDALONE MEDIA CHANNELS

Networking Lunch