

the
futures
company

Yankelovich MONITOR® LIVE

Revisiting Simplicity

Presented by Holly Moore
VP, Global Accounts
August 12, 2009

Dial-in: 888 253 4037 Passcode: 270189#

the coming together of
Henley Centre HeadlightVision
and Yankelovich

Our Agenda Today



- **Update on Simplification**
 - Focus on Women 25-54
 - State of play during this recession
 - New Directions, New Tactics
- **New Ways of Refreshing Simplicity**
 - Value Mapping Application
 - New Points of Connection

The Simplicity Beat Goes On



Global Energy

The temptations and demands of modern society mean that people are living increasingly fast, full and flexible lives

- The continuing search for simplicity still shows a strong market for solutions that make life easier and reduce complexity

Among Women 25-54:
“More and more I find I am looking for ways of simplifying my life”

1994 %	2002 %	2008 %
87	83	86

Among Women 25-54 by level of economic anxiety

None/ Low %	Moderate %	High %	Severe %
77	86	89	88

A Question of Focus

- Pick your battles, because the To Do list isn't going to get much shorter!

Among Women 25-54	2000 %	2004 %	2008 %
I am focusing more on controlling what I can and worrying less about the things outside my control	80	84	85
No matter how hard I try, I never seem to have enough time to do all the things I need to do	80	80	74
	1999 %	2004 %	2008 %
I work hard at coming out on top in every situation - from the least important to the most important	70	66	55

Simplicity: A Driver and Gut-Check for Innovation

- Make it less painful
- Make it seamless
- Make it just for me
- Make it better
- Make it a habit
- Make it easy for me to understand



She's Taking a Pass Without a Simple Payoff

100ThingChallenge

Barbra Streisand is auctioning off 400+ items to charity, saying she's **“through with extra stuff.”**

(Source: AP, 8/5/2009)

- “Brightsiding” reflects the upside consumers are finding from cutting back on spending and pulling back on obligations
- Pushing back on abundance in areas where it didn't deliver satisfaction
- A question of quality: “Love it or Lose it”

Among Women 25-54

2008
%

The fewer possessions you have, the less you have to worry about and the happier you are

60

I would like to slow down, but I can't afford the luxury of doing less

51

Refreshing The Simplicity Proposition: A Value Mapping Analysis

VMA helps quantify and statistically assess potential new value propositions when current value dimensions become widely commoditized and/or consumer values shift

- **Not about abandoning a heritage of simplicity**
- **Identifying evolutionary new value propositions that are relevant, “ownable”, and available**

Simplification

**Value Weight:
.33**

**Time-
Starved**

**Value Weight:
.33**

**In
Control**

**Value Weight:
.33**

Refreshing The Simplicity Proposition: A Value Mapping Analysis

Among Women 25-54:

Combined Reach: 77% Combined Frequency: 39%

Simplification

Value Weight:
.33

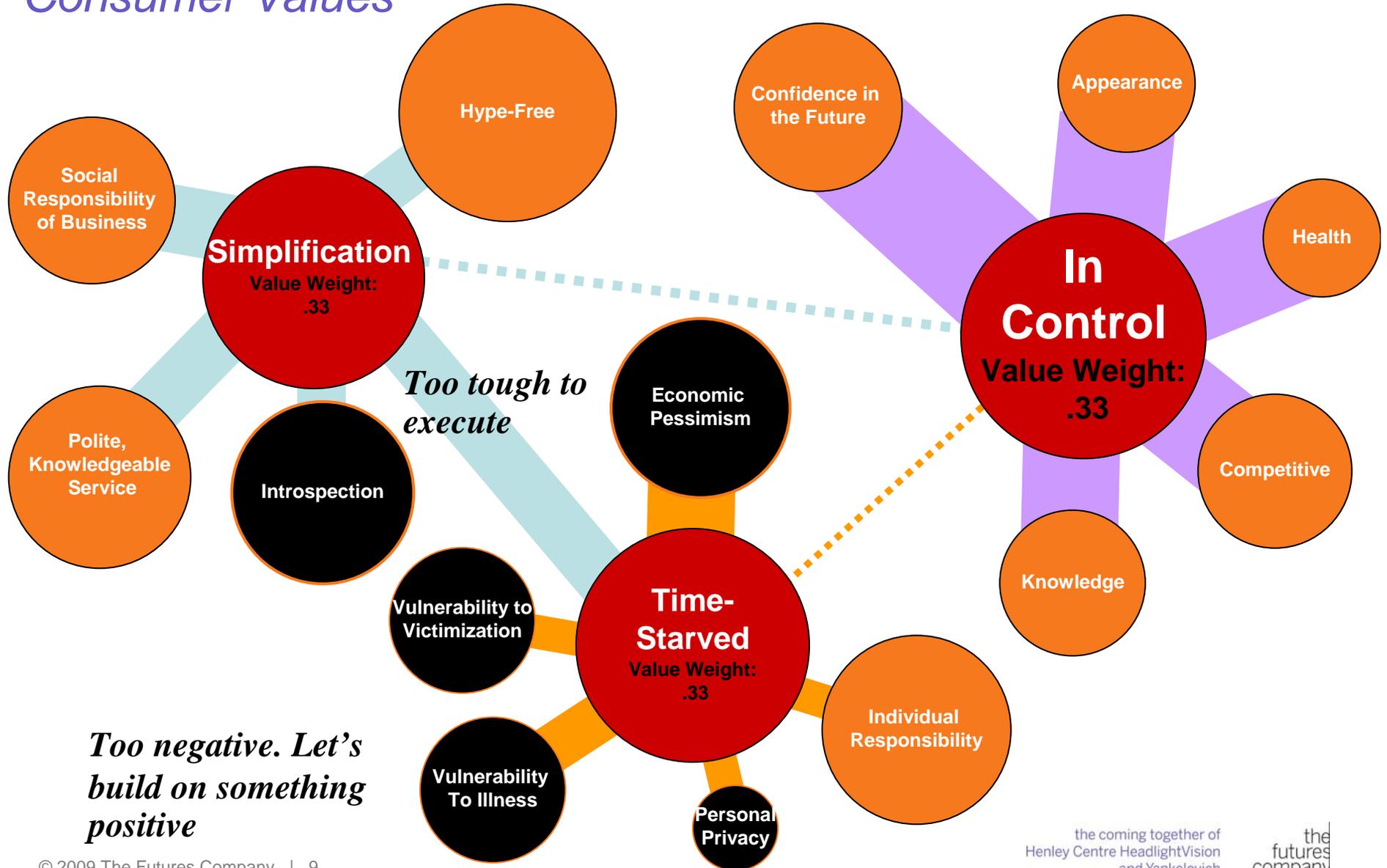
**Time-
Starved**

Value Weight:
.33

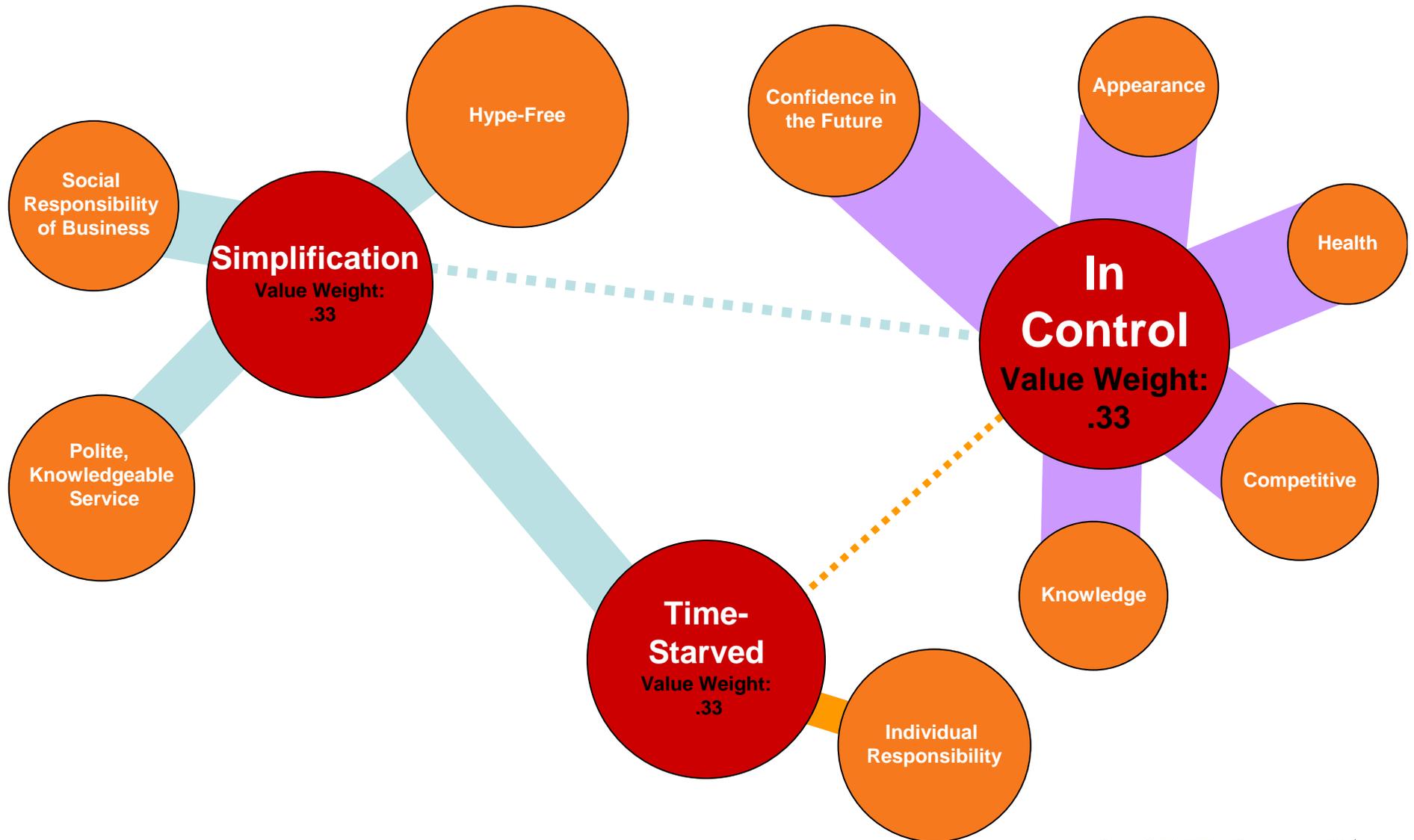
**In
Control**

Value Weight:
.33

A Value Mapping Analysis: Finding Correlations to New Consumer Values



A Value Mapping Analysis: Focus on Actionable Values



Value Mapping Analysis

- Nine fresh new consumer values emerge
- Step 2: TURF analysis identifies which values offer widest and strongest connections



Value Mapping Analysis

- Six values emerge as top values
- Combos of any three values offer greater reach and frequency among Women 25-54:
 - Reach: 85%+
 - Frequency: 53%+

Confidence in
the Future

Social
Responsibility
of Business

Health

Polite,
Knowledgeable
Service

Competitive

Hype-Free

Looking for a Little Help with Responsibility

Among Women 25-54

77%

agree, “Companies should make it easier for me to do the right thing, like being more environmentally friendly, eating right, etc.”

From Global Streetscapes:



[The Balcony Gardener](#) helps consumers make the most of small outside urban spaces by delivering ready-made container gardens including edible gardens full of fresh herbs.

South Korea is the second largest credit card market in the world (after USA).

Local mobile carrier SK Telecom launched a new service this month, [Mobile Financial Diary](#), that allows subscribers to view statements of multiple bank accounts and credit cards on a single platform.



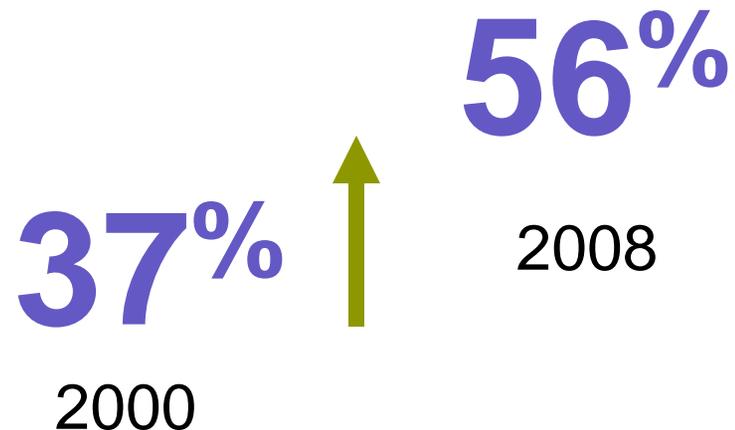
She's Already on Hype-Alert

Among Women 25-54

75%

agree “Most products and services that claim to save me time do not really make a noticeable difference in the amount of time I have available in my week”

Characteristics important to be seen as: Someone who can always see through exaggeration and hype



Serving Up Clarity, Confidence & Smarts

Among Women 25-54

Important in choosing a brand (top three box, of a 7-pt. scale)	2008 %
Offers the best quality without charging more	83
Is easy to use from the first time you try it	79
Allows me to feel confident that I'm not making a bad purchase decision	70
Is recognized as a market leader	44

From Global Streetscapes:

Hannaford Bros.' Guiding Stars algorithm synthesizes several pieces of nutritional information to award food products - including private label goods - a rating of 0-3 stars.



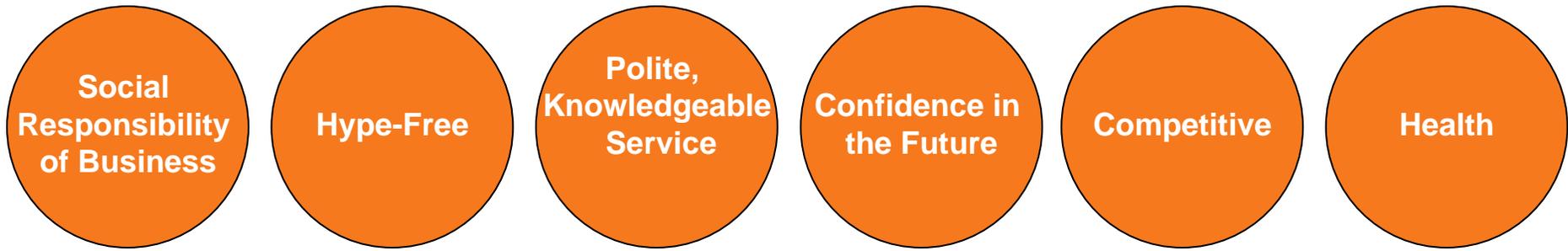
Wine That Loves from the US claims to **takes the guesswork out of food and wine pairing**, and each wine is specifically suited to one dish.



the coming together of
Henley Centre HeadlightVision
and Yankelovich

the
futures
company

Final Thoughts on Linking Back to Simplicity



- Think about how a meticulous commitment to and understanding of these values can either help overcome the barriers consumers face in attempting to gain simplicity in their lives or the end benefits they seek from simplification.

Barriers:

- Lack of trust in business
- Frustration with marketing
- Absence of reliable go-to service partners

Benefits:

- Risk management and responsibility
- Move forward with confidence and come out on top
- Desire for wellness – mind, body and soul

Taking Simplicity and VMA Further

- **Revisiting Simplicity** in your business:
 - Use US or Global MONITOR to understand the dynamics of simplicity, control and time savings among your target
 - Use Future Scenarios to understand the drivers and tensions impacting your business
 - Use a TrendNostic to understand how to improve the performance of marketing communications, products or initiatives which aim to deliver simplicity.
- Leveraging the **Value Mapping Application**
 - Refresh an existing brand proposition with new relevant values
 - Connect with new values that can make your brand stand out and resonate with your target or connect with new targets.

Yankelovich MONITOR[®] LIVE

MONITOR 2008/2009 Sponsors:

Log onto the Yankelovich Client Resource Gateway at <http://gateway.yankelovich.com>.

Click on the MONITOR tab to access the full MONITOR 2008/2009 State of the Consumer report and all the latest data via E-Tabs, including 10 industry-specific banners.

FYI: All of the LIVE sessions are available for 30 days after they have originally aired.

If you were unable to listen to today's LIVE, or if you would like to listen to a session aired on a different date or register for an upcoming event, please contact us at:

[\(866\) 238-0666](tel:8662380666) or LIVE@thefuturescompany.com.

Let us know which topic you want to hear or register for, and we will reply with the access information.

Past events are archived (MP3 audio file and presentation deck) in the client-only area of our Web site: <http://gateway.yankelovich.com>.