

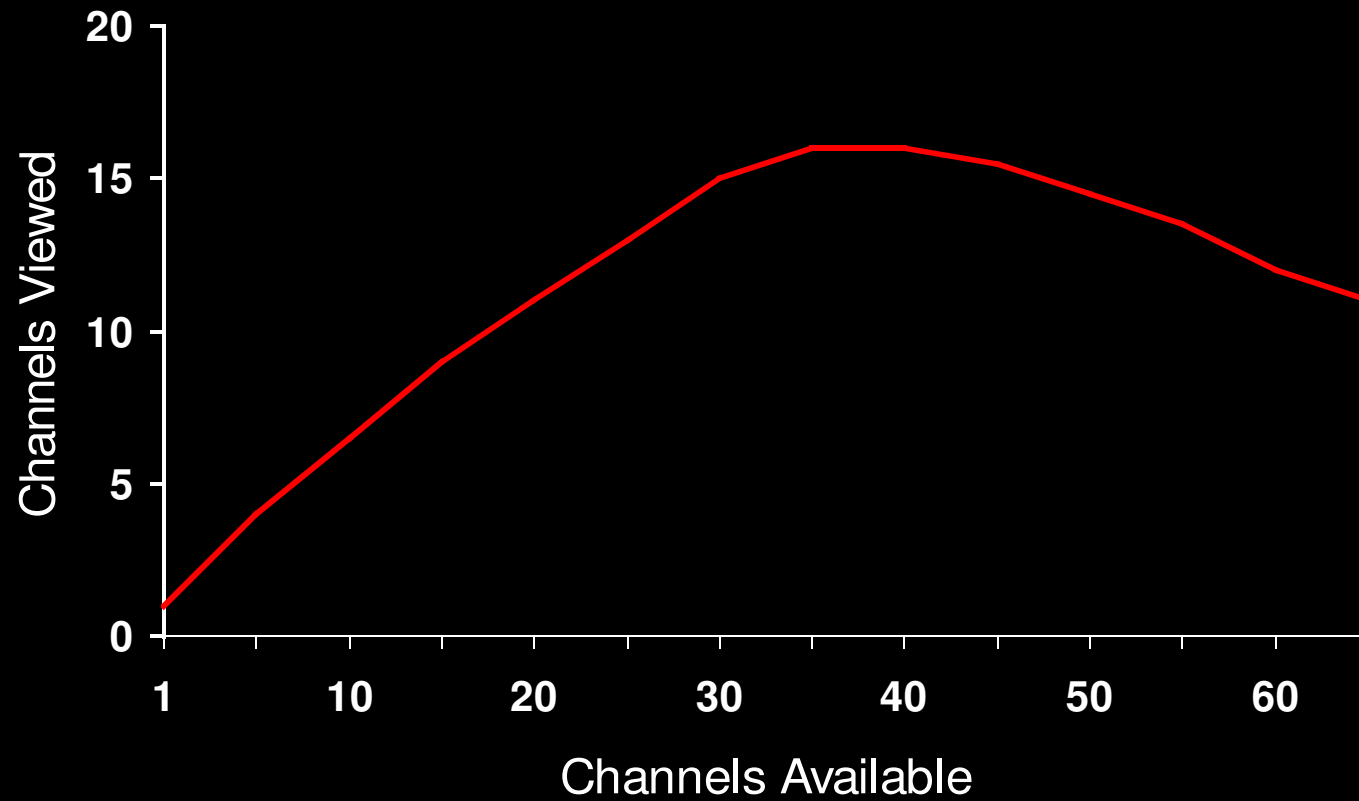
# CONSUMERS ARE OVERWHELMED

- 2,828 TV STATIONS
- 13,000 COMMERCIAL RADIO STATIONS
- 2,567 MAJOR CONSUMER MAGAZINES
- 10,086 DAILY/WEEKLY/SUNDAY NEWSPAPERS
- 1/2 MILLION BILLBOARDS
- 5,000 WEBSITES ACCEPT ADVERTISING

Source: MindShare 2003

Agilvy

# THEY ARE TUNING OUT

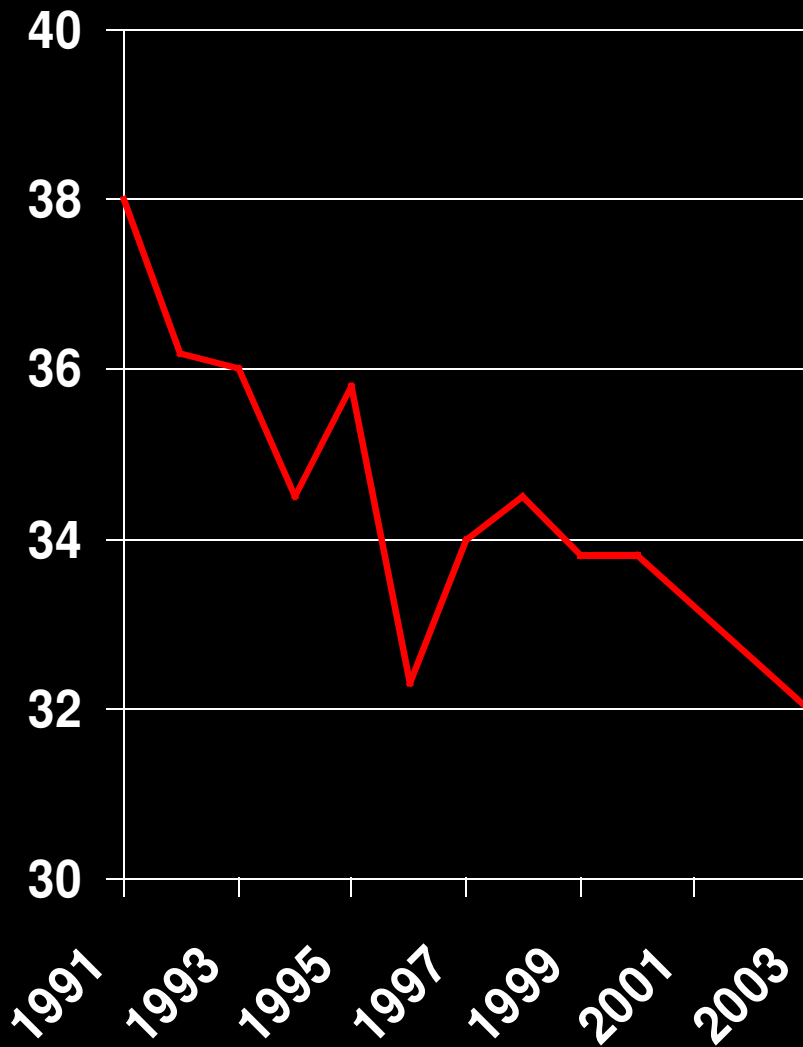


Source: The Henley Centre

Agiloy

# MAKING THEM HARDER TO REACH

% of 18-34  
year olds who  
watch prime-  
time TV in US



Source: Nielsen  
Media Research

*Agilvy*

THEY ARE ALSO HARDER TO PERSUADE:  
"THE CONSUMER PARADOX"

Source: The Henley Centre

Agiloy

THEY ARE ALSO HARDER TO PERSUADE:  
"THE CONSUMER PARADOX"



Consumers are wealthier



Value is more important

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THEY ARE ALSO HARDER TO PERSUADE:  
"THE CONSUMER PARADOX"



More choice



Less time to choose

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THEY ARE ALSO HARDER TO PERSUADE:  
"THE CONSUMER PARADOX"



More satisfied



Complain more

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THEY ARE ALSO HARDER TO PERSUADE:  
"THE CONSUMER PARADOX"



Demand personal attention



Resent intrusion

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THEY ARE ALSO HARDER TO PERSUADE:  
"THE CONSUMER PARADOX"



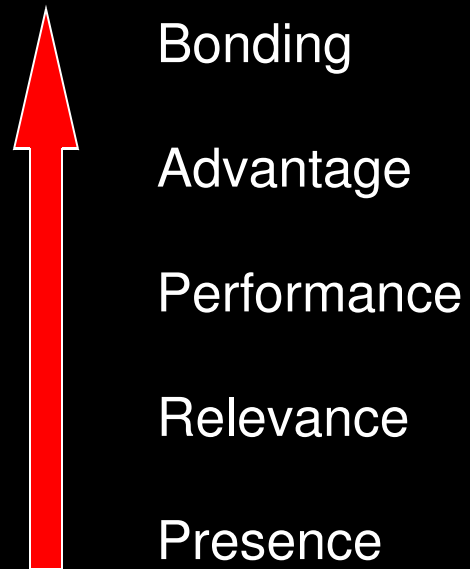
Want personal service



Demand value for money

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# LOYALTY IS KEY

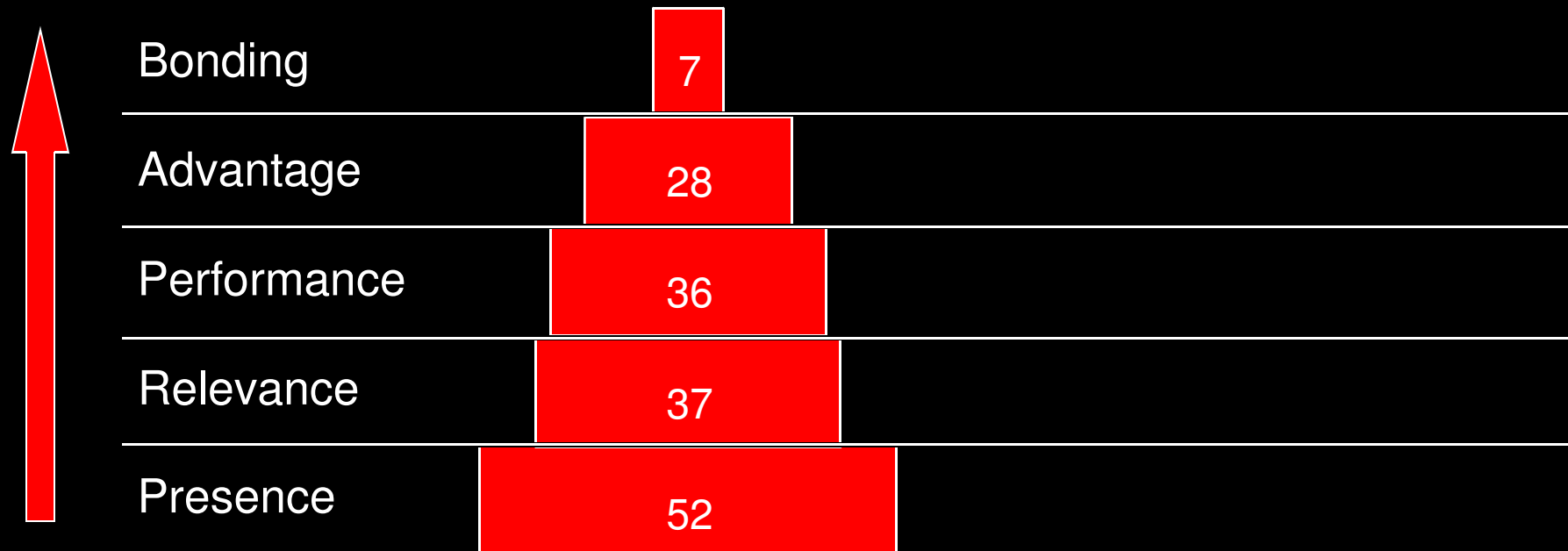


Source: WPP BRANDZ Study

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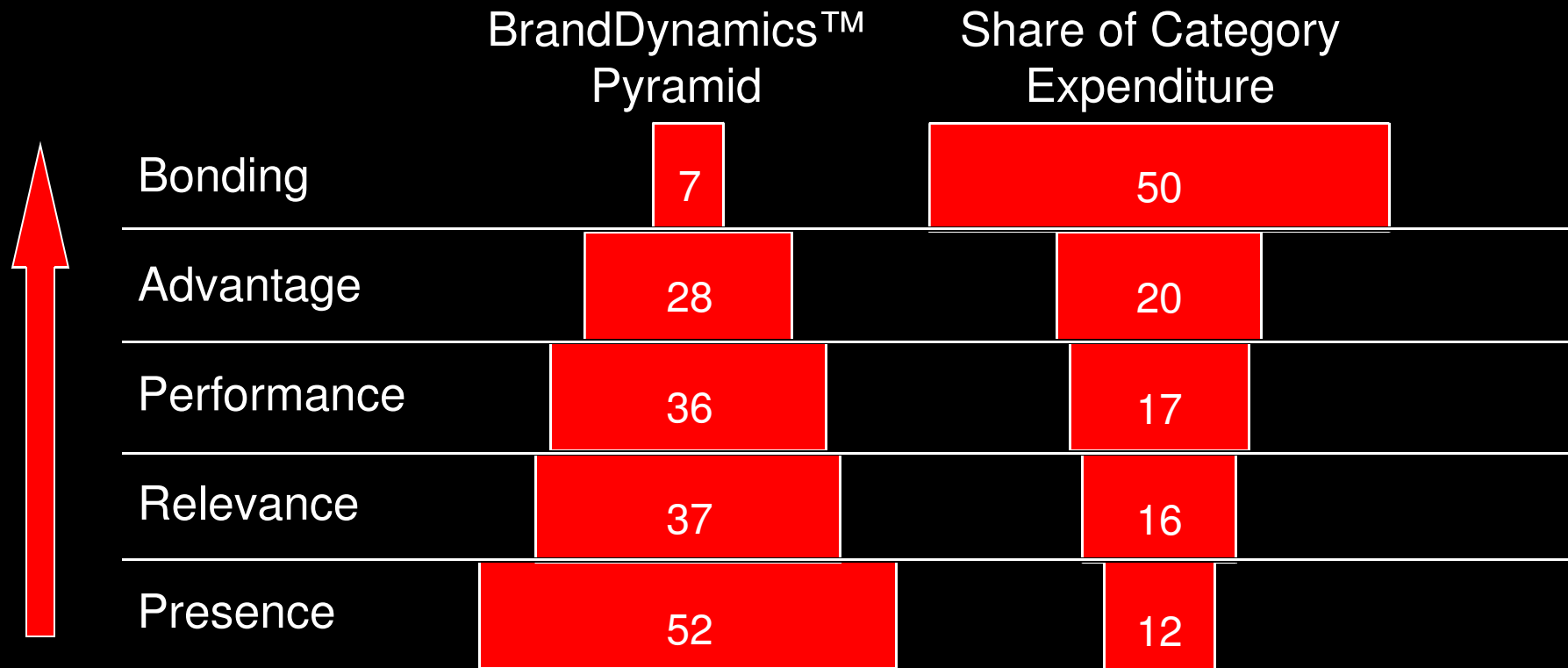
# LOYALTY IS KEY

## BrandDynamics™ Pyramid



Source: WPP BRANDZ Study

# LOYALTY IS KEY



Source: WPP BRANDZ Study

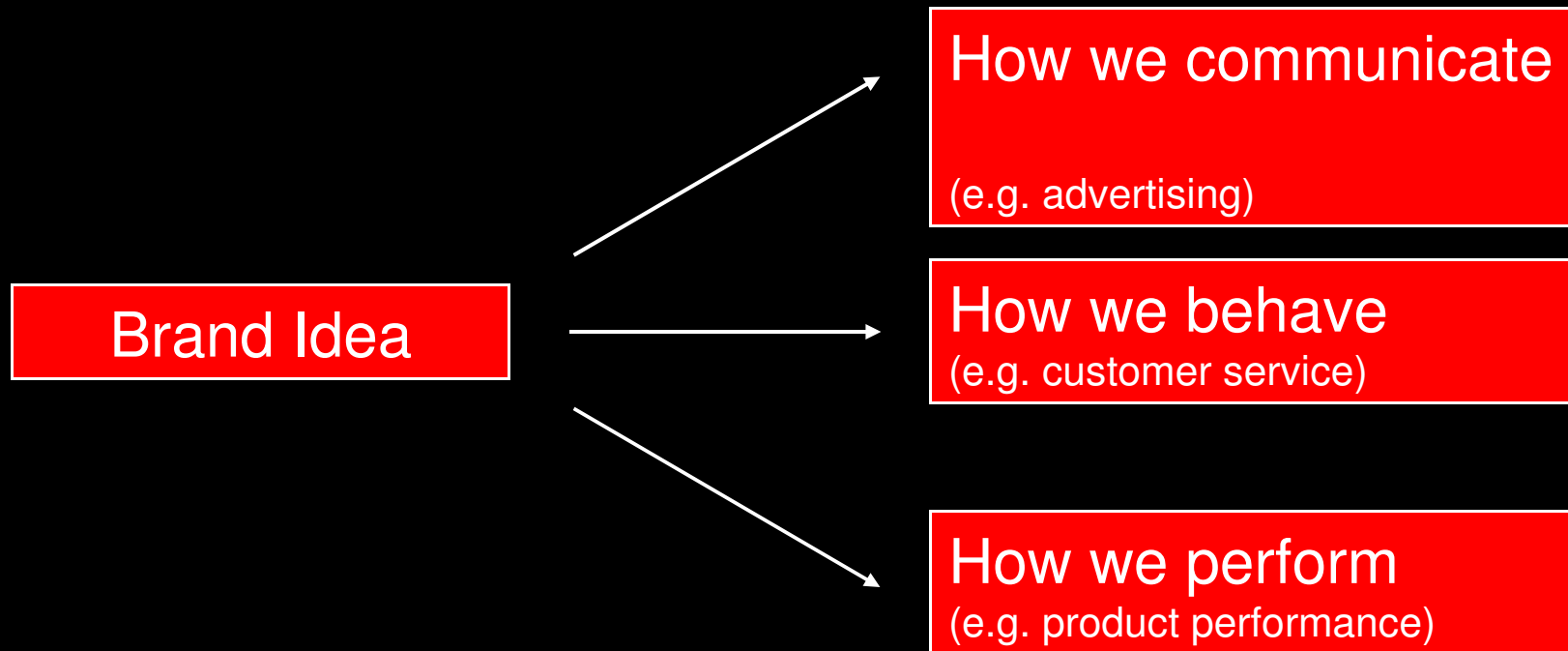
# LOYALTY IS DRIVEN BY BRAND EXPERIENCE

	Kodak (2002)	Nike (2000)	Wal-Mart (2001)
<b>Bonding</b>	65	48	29
<b>Advantage</b>	86	72	49
<b>Performance</b>	86	73	50
<b>Relevance</b>	94	80	84
<b>Presence</b>	100	98	98
(Base)	(400)	(403)	(400)

Source: WPP BRANDZ Study



# BRAND EXPERIENCE DRIVEN BY BRAND IDEA



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bp

