MARKETING LEADERSHIP FORUM

MMA

#MMAF2016



Winning in a Mobile-First World



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May 2016

Our world

Share of Average Time Spent per Day with Select Media by US Adults vs. US Ad Spending Share, 2013-2015

% of total

	2013		2014		2015	
	Time spent share	Ad spending share	Time spent share	Ad spending share	Time spent share	Ad spending share
Digital	**42.6%**	**27.4%**	**45.6%**	**30.6%**	**48.3%**	**33.4%**
—Desktop/ laptop* and other connected devices	22.7%	20.6%	23.3%	19.0%	23.9%	17.0%
—Mobile (nonvoice)	19.8%	6.8%	22.3%	11.5%	24.4%	16.4%
TV**	**39.6%**	**42.2%**	**37.8%**	**41.3%**	**36.4%**	**40.2%**
Radio**	**13.2%**	**9.7%**	**12.8%**	**9.1%**	**12.4%**	**8.6%**
Print**	**4.7%**	**20.6%**	**3.8%**	**19.1%**	**3.0%**	**17.8%**
—Newspapers	2.6%	11.0%	2.0%	10.0%	1.5%	9.2%
—Magazines	2.0%	9.6%	1.7%	9.1%	1.4%	8.6%

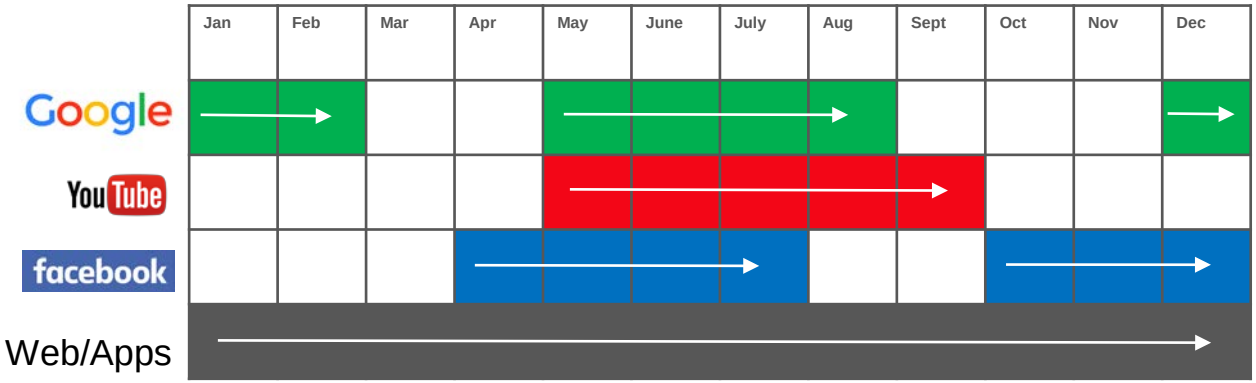
More time is spent with mobile than any other media except TV

Source: eMarketer

How to get started

Do you consider mobile a channel?

Do you see the mobile landscape like this?



When the consumer's experience is like this...



8 in 10

Moms use their phone while shopping in-store

Compared to Gen X Moms, Millennial Moms are **2x** more likely to be **"cord-nevers"**

"I pretty much call my phone my lifeline. I use it all day, every day. If I ever leave home without it, I feel naked."

—Mary Kathryn L., 47

Pair it with another that says we spend 177 minutes on our phones per day,[6] and you get a pretty fascinating reality: mobile sessions that average a mere 1 minute and 10 seconds long, dozens and dozens of times per day. It's like we're speed dating with our phones.



70% agree that now that they are moms, they are more likely to *skip* TV commercials

Sources:
Think, Google
BabyCenter 21st Century Mom® Insight Series:

Not Mobile Marketing ...
Marketing in a Mobile World







The New York Times

Put yourself in thier shoes.
Consider their perspective.

How are they receiving your messages?

Is it in a way that's part of their normal routines?

How could you make it easier for them?



State of Mobile @ J&J

>50% of our website traffic comes from mobile devices, CANVAS accelerating our mobile-friendly presence

>50% of searches for our brands have come from mobile since 2014, crossing threshold a year before Google overall

50+ mobile apps in market across J&J Consumer

Six Getting Started Tips

- ✓ Appoint a mobile champion
- ✓ Develop a micro-moment insights plan and integrate with your brand-building framework
- ✓ Ensure all brands have a basic mobile presence
- ✓ Ensure your mobile media is hitting industry benchmarks
- ✓ Create a mobile measurement framework
- ✓ Practice “App Abstinence” and sunset apps that aren’t working hard for you

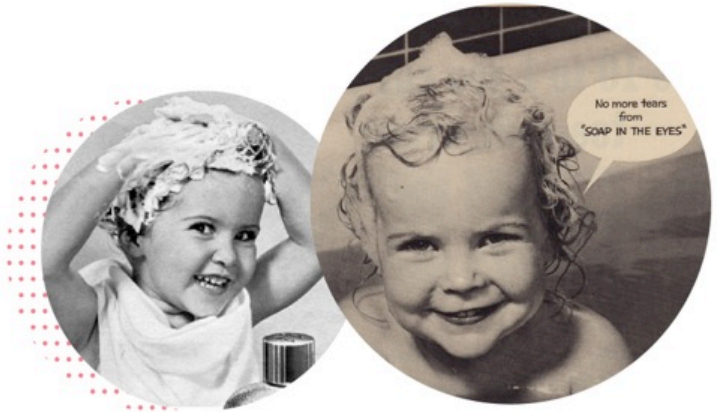
Appoint a Champion to Instill A *Mobility* Mindset

Define scope of role and appoint a mobile “owner” to:

- Drive mobile-first thinking, elevating the role of mobile within the organization
- Increase marketer competency; developing training and learning sessions
- Provide toolsets, governance and standards to increase effectiveness of mobile assets
- Incubate scalable pilots and integrate new technologies and ways of working



J&J is rooted in building trust, improving the lives of our consumers through solutions to everyday problems







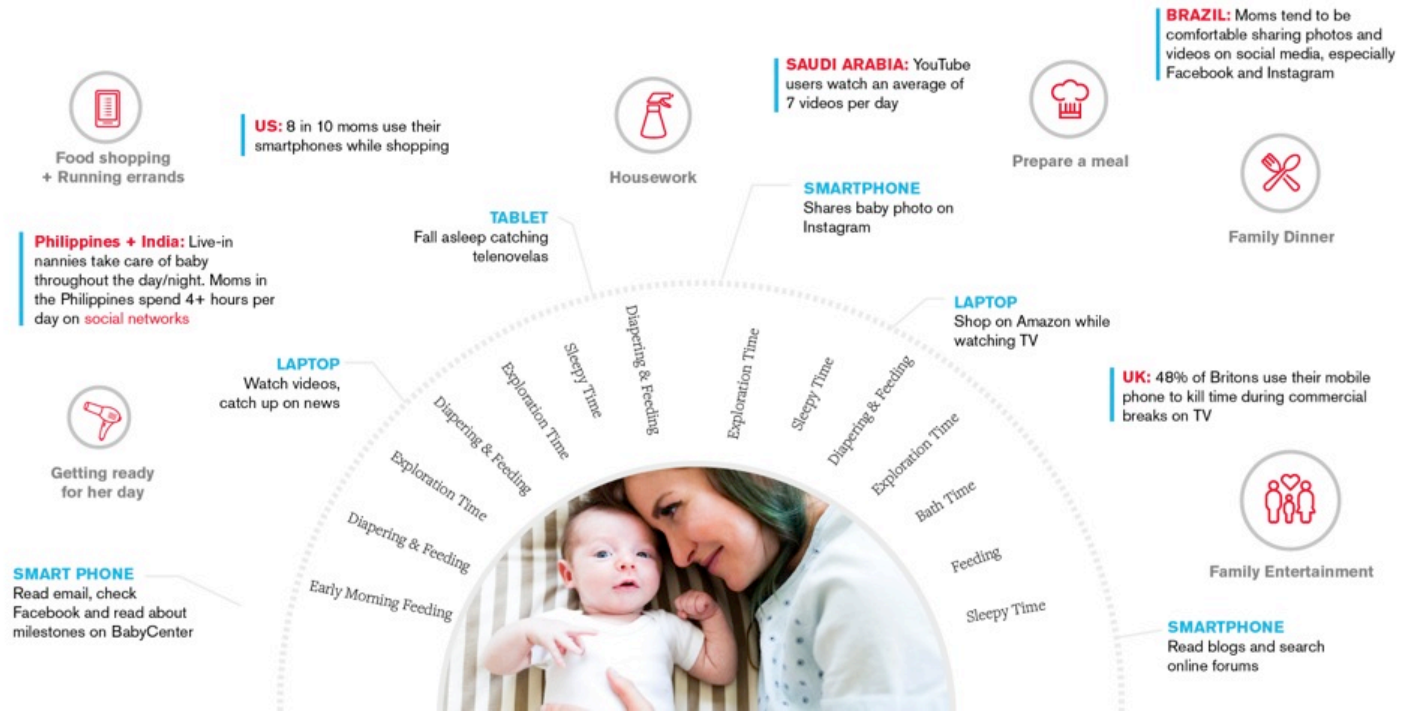
NO MORE TEARS, the first mild and soap-free shampoo to gently clean babies without irritating their eyes



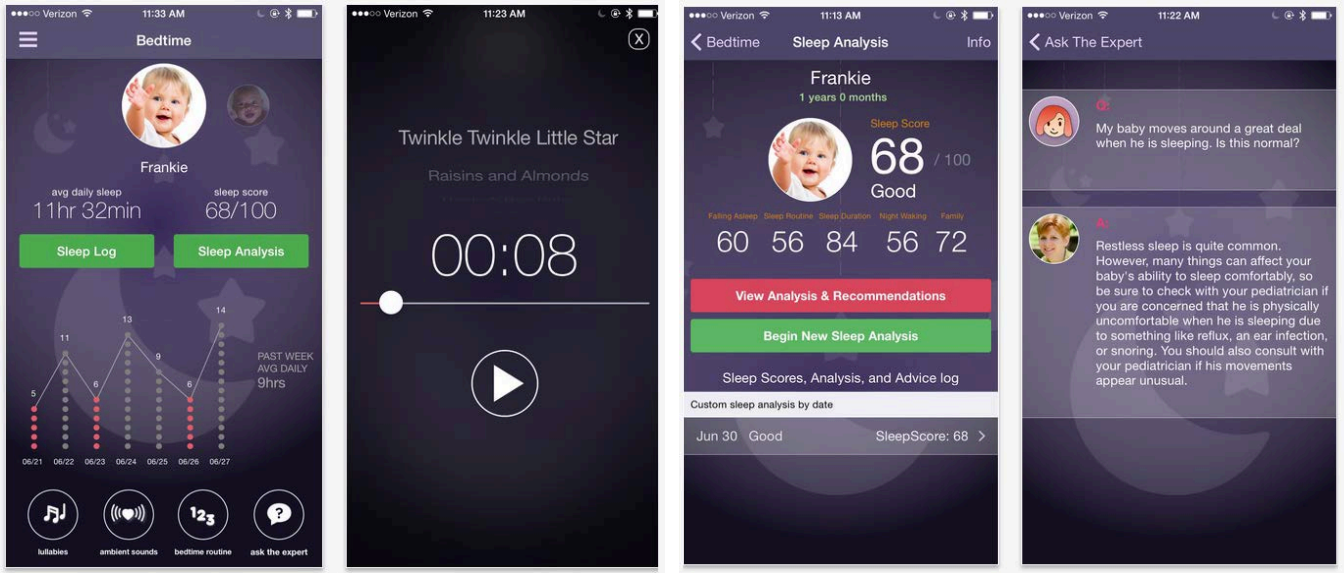
Created first water resistant sunscreen for kids

1950's

Today, we are using social listening and analytics to drive relevance in mobile moments



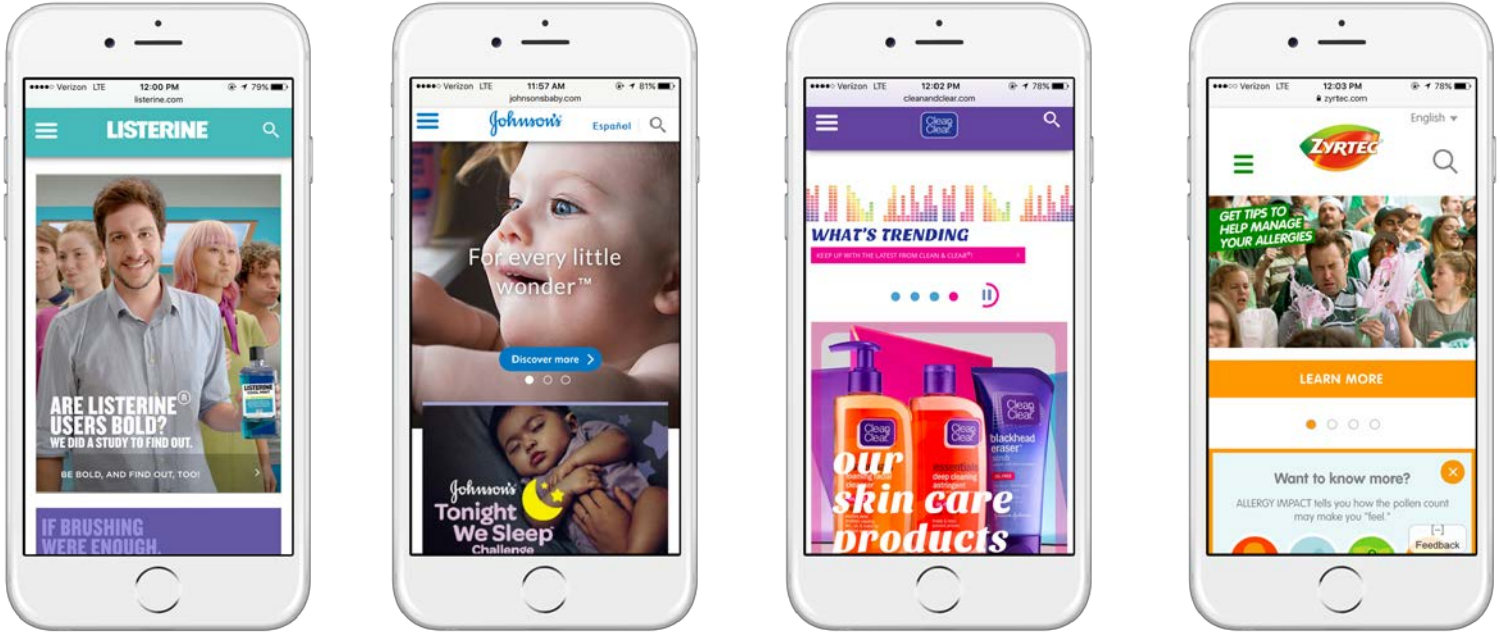
Our JOHNSON'S® Brand has developed the ***BEDTIME® Baby Sleep App*** based on these insights



The JOHNSON'S® BEDTIME® Baby Sleep App provides:

- Sleep Log to track baby's sleep sessions
- 3-Step nighttime routine with instructive videos and step-by-step advice
- Access to our panel of sleep analysts, who will answer your sleep-related questions
- Lullabies and Ambient Sounds and Music to help soothe your baby to sleep

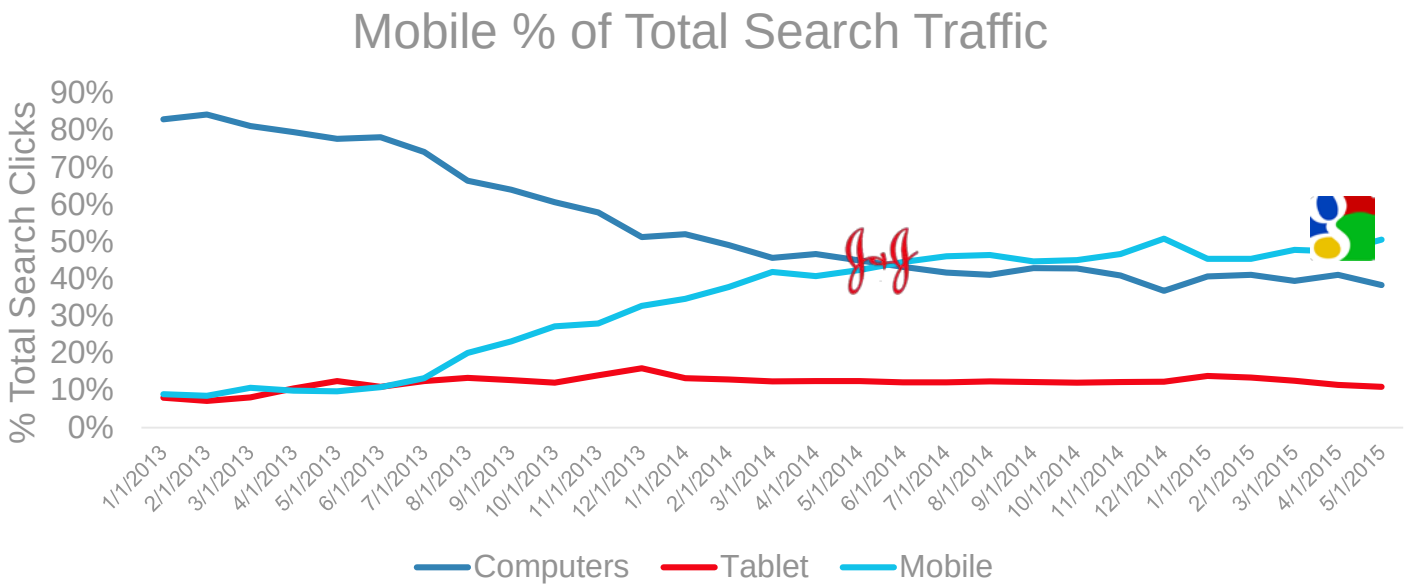
Ensure you have a basic mobile presence



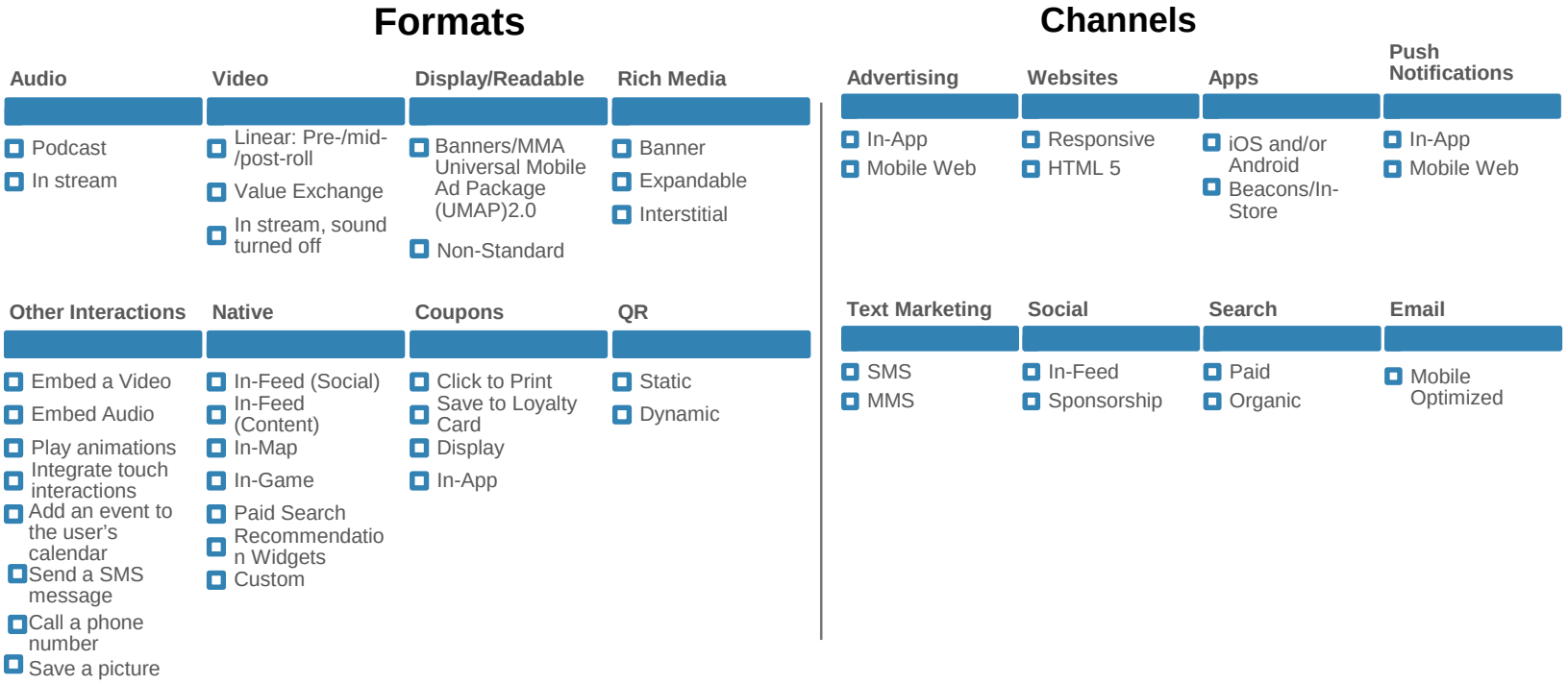
- Sites on our internal web platform, CANVAS, are on average **8-10 points** higher on the Google Mobile Friendliness Score
- Of the 115 sites we've migrated to our new platform, **50% previously didn't have a mobile-friendly presence**, and none were tablet friendly!

In Search, our ‘mobile moment’ came about a year before Google’s

Today, more than half of our brand site traffic around the world is coming from a mobile device



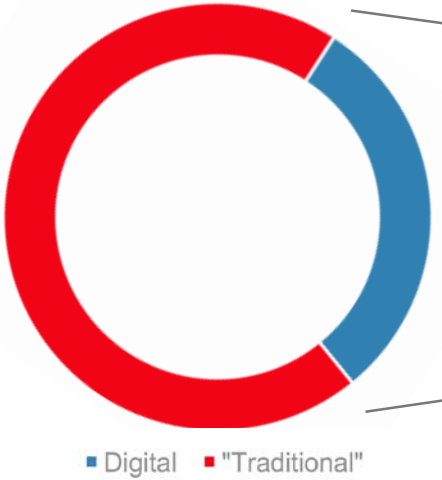
Does your mobile measurement cover these channels and formats?



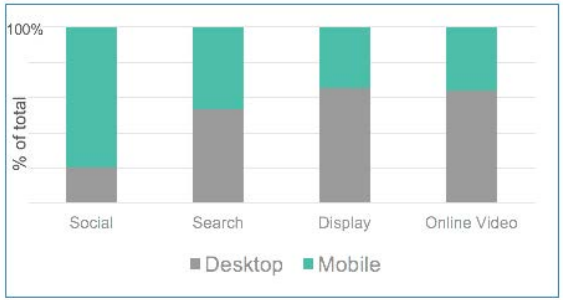
Source: MMA SMOX

We've just begun reporting deeper on mobile media to increase sufficiency

Total Global Working Media Spend

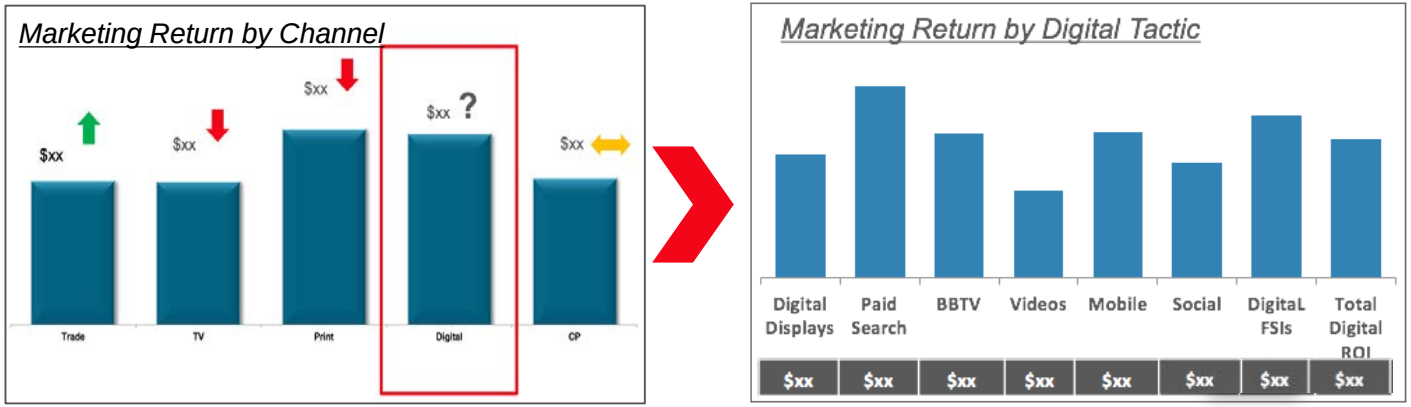


Total Global Digital Media Spend

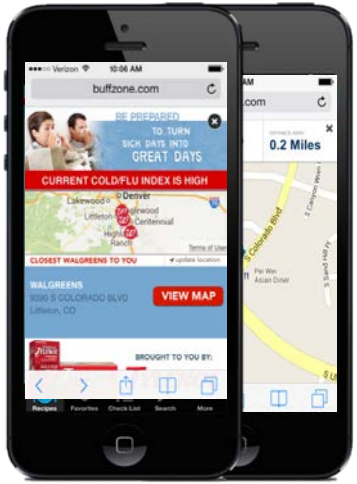


- Goal: Increase our mobile media sufficiency by shifting our mobile share of impressions to rightsize with consumer behavior
- Audit completed to quantify total mobile media investment globally for the the 1st time, across display, social, online video and search

Is Mobile broken out in your measurement model?



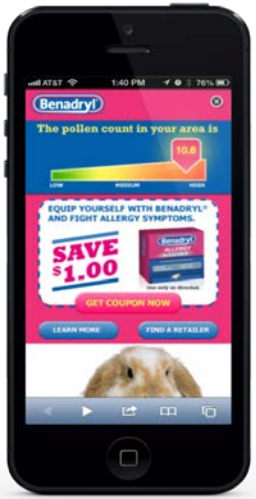
How we've driven effectiveness of media using mobile data and targeting



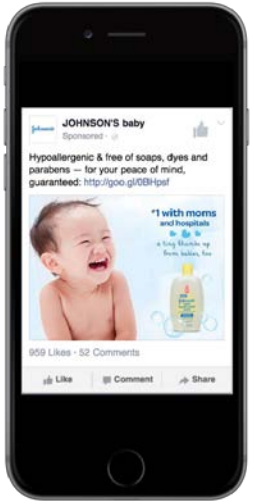
Ads triggered based on when cold and flu index + proximity to store



Ads triggered based on users' exact location + UV index



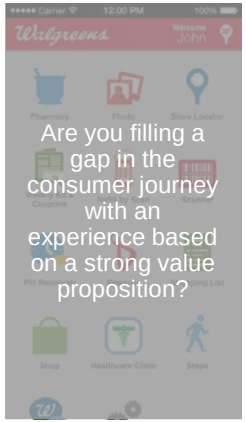
Ads triggered based on location, weather and pollen data



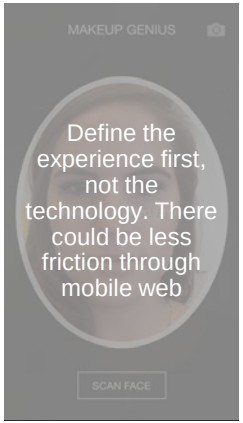
Ads targeted based on key consumer segments paired with custom creative

Practice App Abstinence: Mobility ≠ An App

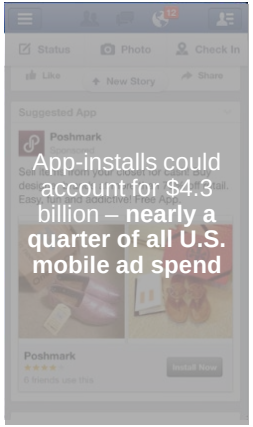
Is it as meaningful to the user as the brand?



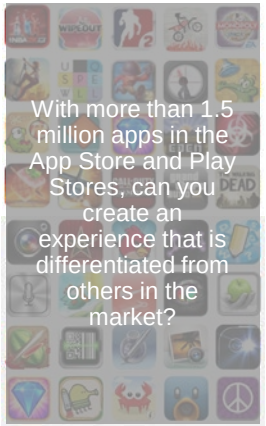
Does it have to be or is it better as an app?



Are you able to invest in user acquisition and retention?



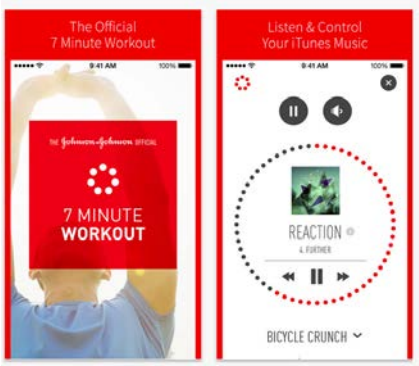
Can you stand out in the category?



Source: eMarketer 2014; Flurry 2014

Where we've seen success

THE Johnson & Johnson OFFICIAL 7 MINUTE WORKOUT



- *Nearly 2,000,000 downloads since launch in 2014, this is J&J's most popular app to date*
- *Highly engaged user-base (100k MAU's & average time spent 9:00+ minutes*
- *4.5 out of 5 star rating based on 3,500+ reviews*

Johnson & Johnson 7 MINUTE WELLNESS for Expecting and New Moms™



- *Brand new app launch built of the success of the original 7 minute workout app*
- *Launched March 2016, already named "Best New App" by Apple and featured prominently in App Store*
- *Reached Top 50 in US Health & Wellness Category*

The questions you should be asking

- ✓ Have you mapped your mobile consumer journey?
- ✓ Have you developed creative against those moments?
- ✓ Do you review your creative from a mobile device?
- ✓ Do you know how much time your consumer spends in mobile-first experiences and are you present in them?
- ✓ Do you know how much of your media is spent in mobile channels?
- ✓ How often are you looking at that?
- ✓ Do you have a basic mobile presence? Do you understand the performance of your owned and earned assets in Mobile?
- ✓ Do you understand your viewability in Mobile?
- ✓ Have you named a mobile “champion”?

Opportunities for all of us

- ✓Develop standard definitions for mobile
- ✓Develop Mobile Viewability and performance standards
- ✓Break out of Mobile Jail to look at Mobile as a percentage of overall media mix
- ✓Better incorporate Mobile into our Media/Attribution models
- ✓Consolidate the mobile vendor landscape

Our goal

Provide consumers with a **frictionless**, **consistent** and **continuous experience** across our J&J brands anytime, anywhere, regardless of the channel, format, location or device – online or offline.



Thank You

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