

# **The On-Demand Generation: Adapting to Today's Globalized Customer and User Needs**

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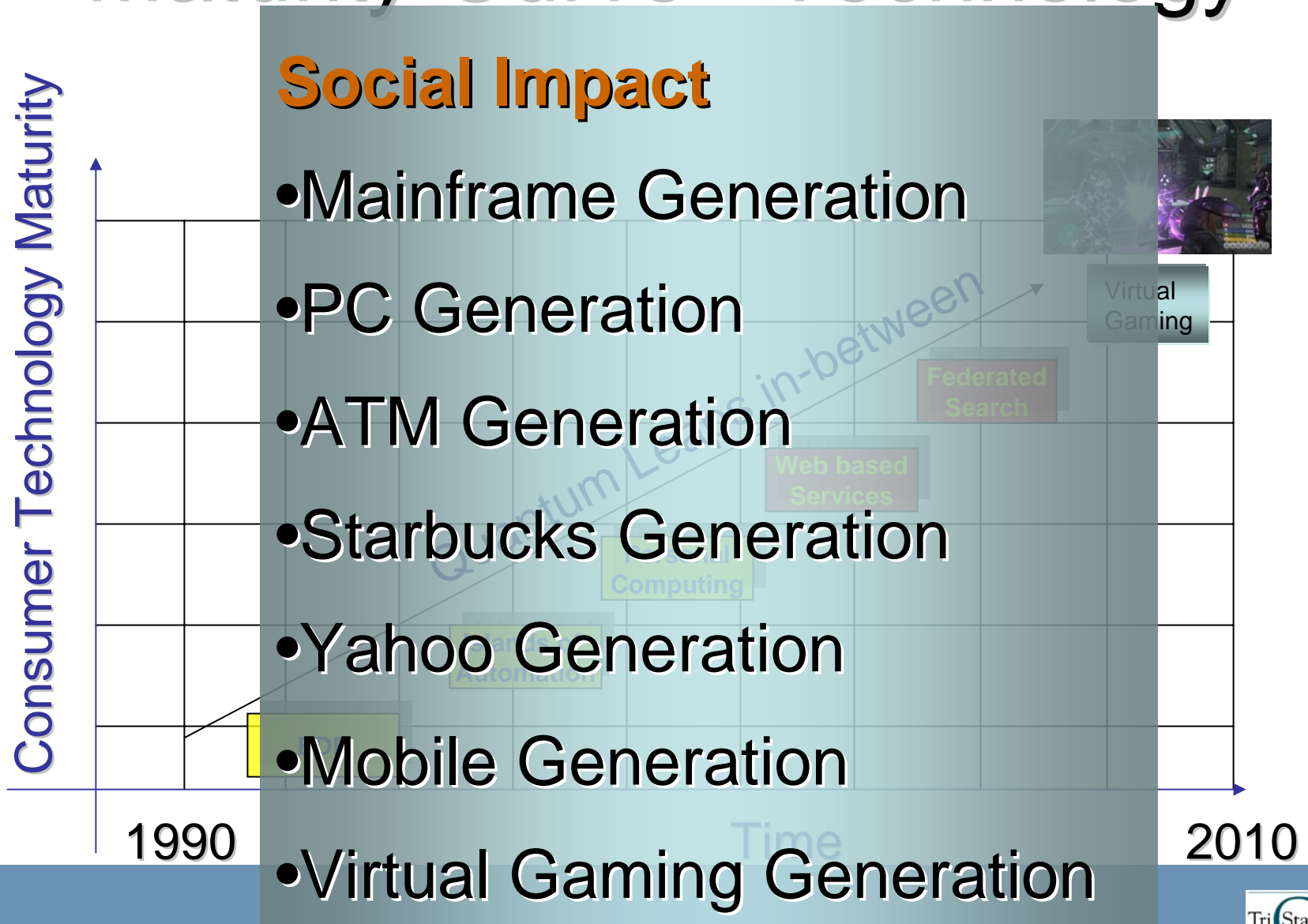
**May 7, 2008**

# 10 years of Change

# Web What?

- Web 2.0...
- Web 3.0...
- Web x.0...
- An Interactive Internet platform

# Maturity Curve - Technology



# Generations – a better definition

Generation	Definition	2012 Projected Millions	% Change 2012

Source: Mintel/U.S. Census Bureau, interim population projections released 2004 and annual population estimates

# Social Networking Impact (US)

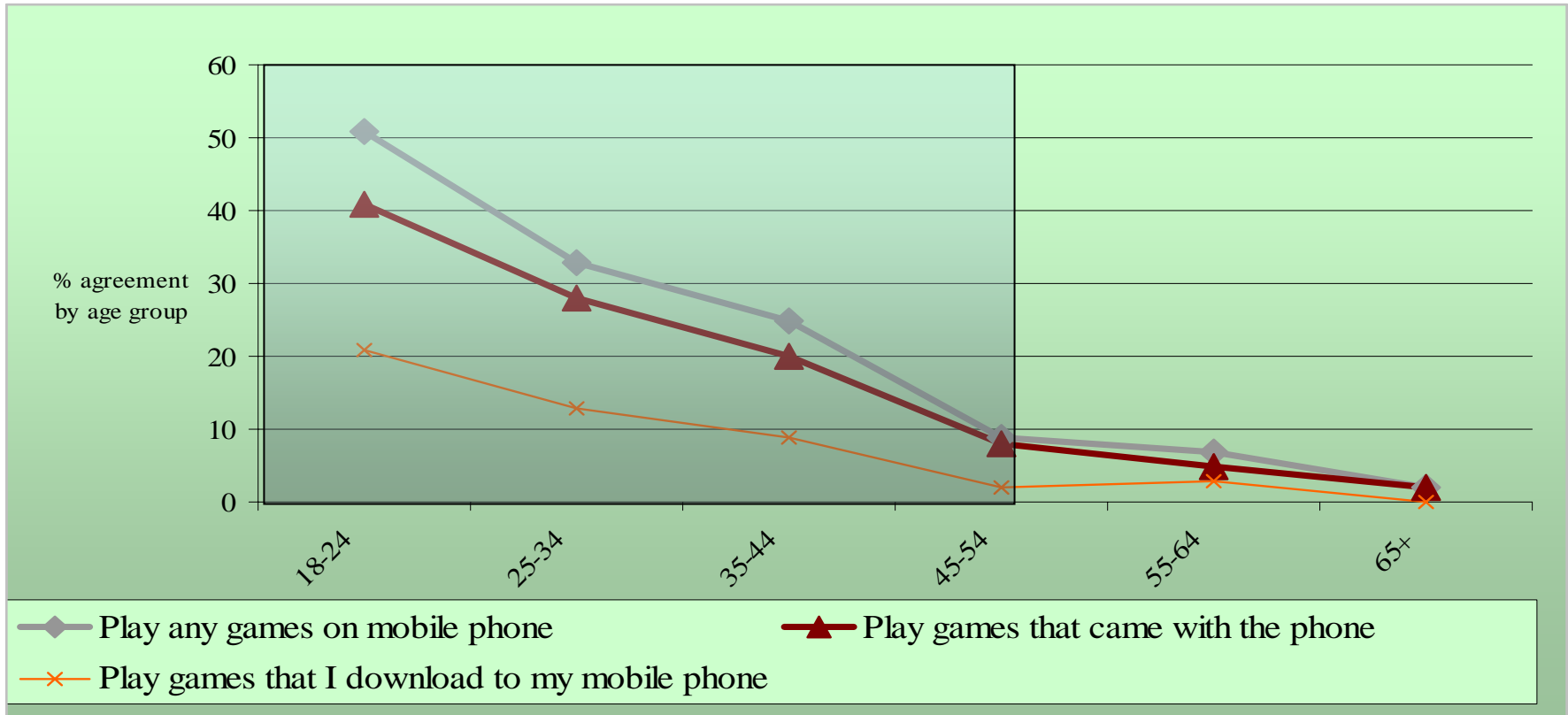
## Usage of social networking sites, November 2007

*“Do you have profiles at any of the following sites?”*

Social networking site	All %	Male %	Female %
MySpace	79	77	80
Facebook	43	43	42
Classmates	25	24	26
Yahoo! 3600	18	18	19
Reunion.com	13	11	15
Flickr	10	10	9
Friendster	9	10	9
Tagged	6	7	5
LiveJournal	6	5	6
Windows Live Spaces	6	6	5
AOL Hometown	5	7	3
BlackPlanet.com	5	6	4
Blogger	5	5	5
Bebo	5	4	5
Xanga	3	3	2
MeetUp	2	3	2
iMeem	1	2	1
Broadcaster.com	1	2	1
Fotolog	1	1	1
Other	13	15	11
I do not have a social networking profile	4	5	3

**Source: Mintel/Greenfield Online**

# Mobile Uptake (US)



Source: Mintel/Greenfield

# PC Sales: Market Segmentation

	<b>2005</b>		<b>2007 (est.)</b>		<b>% change</b>
	<b>\$million</b>	<b>%</b>	<b>\$million</b>	<b>%</b>	<b>2005-07</b>
Notebooks	11,730	60.4	13,681	63.4	16.6
Desktops	7,675	39.6	7,888	36.6	2.7
<b>Total</b>	<b>19,404*</b>	<b>100.0</b>	<b>21,568</b>	<b>100.0</b>	<b>11.1</b>

Source: Mintel/Consumer Electronics Association

# Consumer: PC Usage by Age

	<b>Total</b>	<b>18-24</b>	<b>25-34</b>	<b>35-44</b>	<b>45-54</b>	<b>55-64</b>	<b>65+</b>
	%	%	%	%	%	%	%
Use PC for work	38	41	46	44	38	32	24
Maintain a website	16	25	24	19	13	11	7
Maintain a blog	11	25	20	11	7	6	3
Do video conferencing/messaging	9	14	17	9	7	6	5

# Marketing Attitudes & Behavior

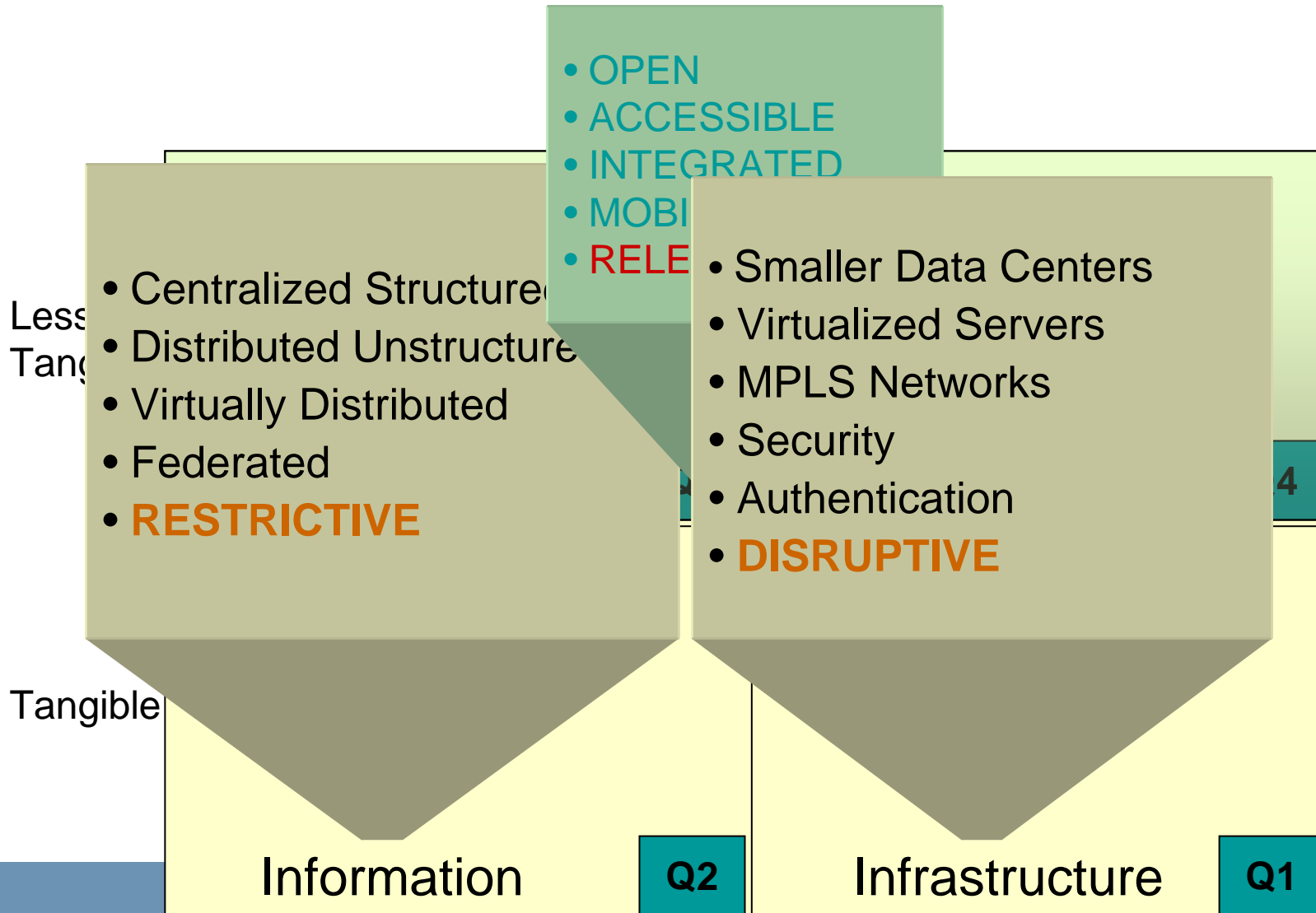
**How Internet users interact with or respond to online advertising, by age, November 2007**

*“Please tell us whether you agree with any of the following statements.”*

18-24	25-34	35-44	45-54	55-64	65+
%	%	%	%	%	%

**Source: Mintel/Greenfield Online**

# View Point: IT vs. Customers





บริการ  
SERVICE  
MEETING  
CALLS  
MT

**Internet**  
In gas station

เรียบร้อย



2



4  
No Turn

# Spending Shift Indicators

**U.S. online social network advertising spending, by site/type of network, 2007 and 2008, May 2007**

	<b>2007 \$million</b>	<b>2008* \$million</b>
MySpace	525	820
Facebook	125	215
Other general social network sites and portal-based social networks	180	225
Niche social networks and marketer-sponsored social networks*	70	120
<b>Total</b>	<b>900</b>	<b>1,380</b>

\* projected

**Source: Mintel/eMarketer**

# The Customer is Changing the Norm

Generation	Definition	2012 Projected Millions	% Change 2012
Echo Boomers*	1977 – 1994	77,346	4.8

- Drivers of new Technology Adoption
- A different mindset on issues of Security
- Most grew up with the Internet at home

# 8 Most Dangerous Technologies

- Instant Messaging
- Web Mail
- Portable Storage (e.g. USB drives)
- Smart Phones
- Camera Phones
- Skype / VoIP
- Downloadable Widgets
- Virtual Worlds (e.g. Second Life)

*Source: Computerworld*

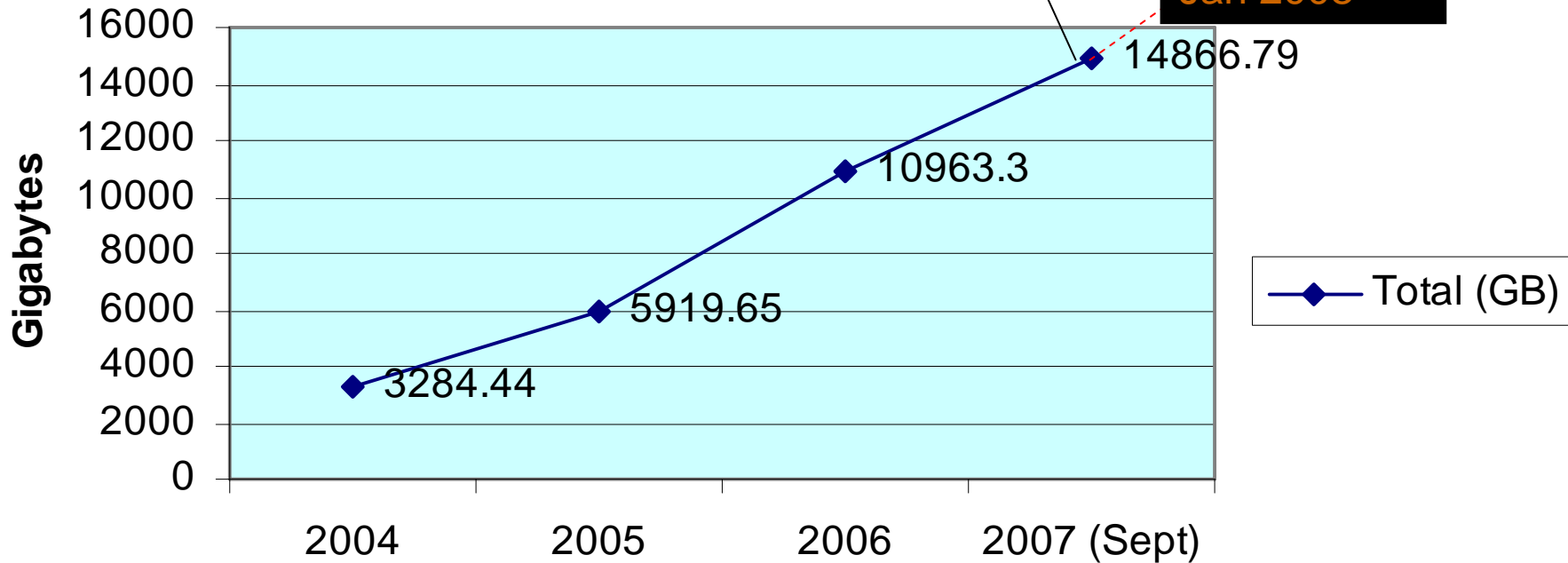
# Walking the walk!!

Beta Launch of  
Desktop Widget

40 Terabytes  
December 08

## Digital Content over the Web

25 Terabytes  
Jan 2008



# Current Position...??

- Information

- Anywhere

- Always-On

- Accuracy

- Consolidated

- Continuous

- Mobility & Search

- 99% availability

- Business Intelligence

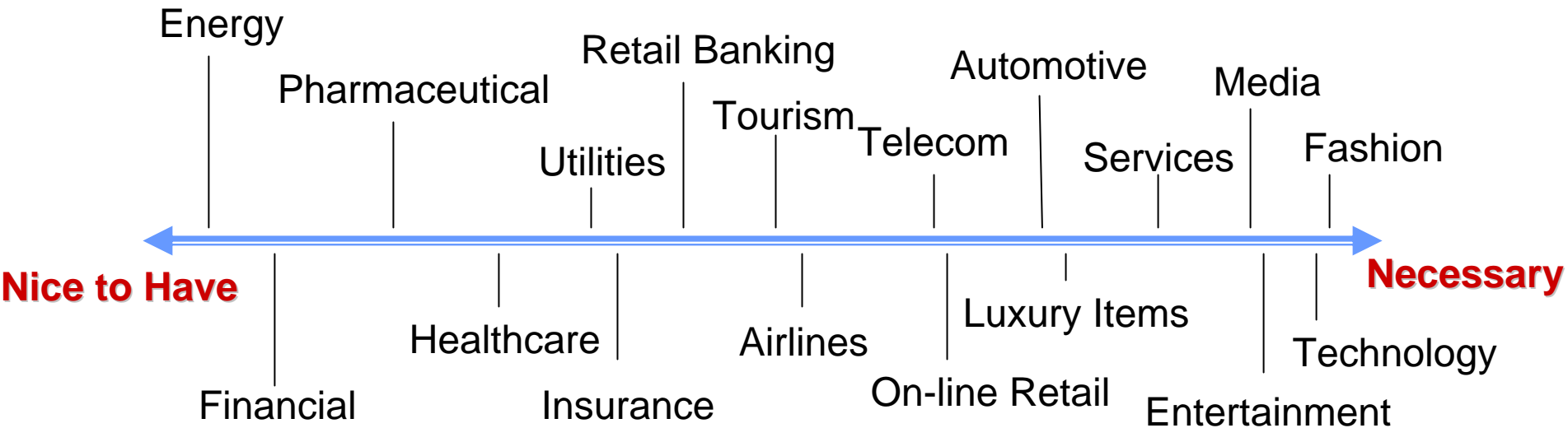
- Portals/Single Sign-on

- Highly available

# Customer Expectations

- Mobile Portals **Anywhere**
- Smart Phones **Always-On**
- Informal Discussion Forums **Continuous**
- Portal based access & RSS Capability **Consolidated**
- Decision Making Information **Accuracy**
- Profile management
- Complex Information Availability – Mashups

# New Tools Adoption: Industry Need Spectrum



# In Summary

- New Media Influence
- Advanced Home computing
- Evolving Customer Behavior
- No shortage of technologies
- Security a background issue
- Varied Adoption by IT departments

# Adapting in time...

*“Elephants have a hard time adapting.  
Cockroaches outlive everything.”*

- Peter Drucker