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changing perspectives

ON GLOBAL, MULTINATIONAL & LOCAL

inside issue 2006. early autumn

HP's Berg
'Conducts'
Rather Than
'Directs'
Global Media

Converged
World Not
So Different,
Writes BBH's
Jonny Shaw

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MULTINATIONAL & LOCAL

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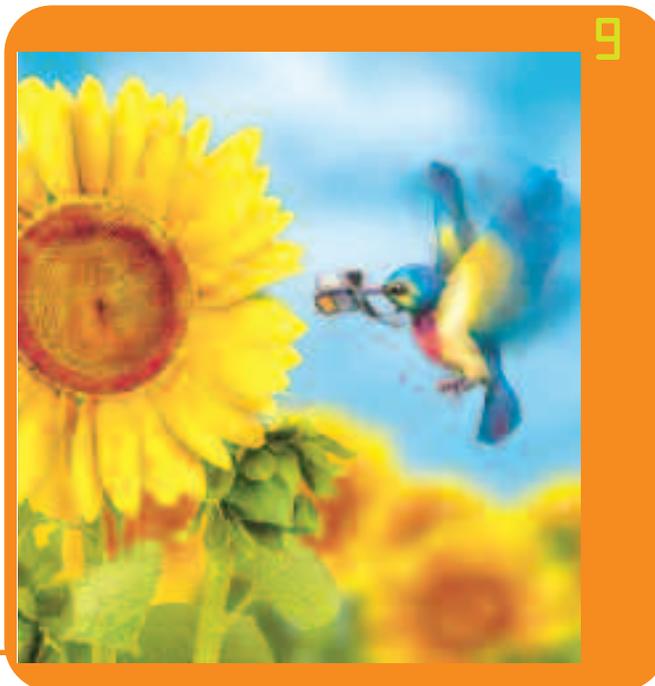
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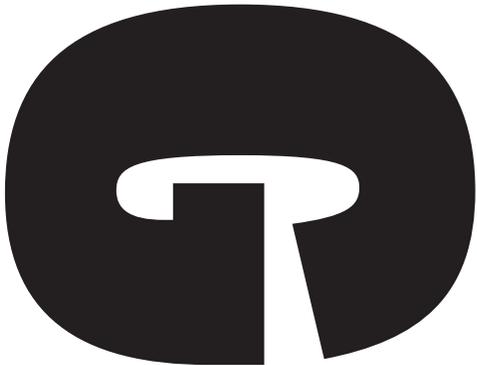
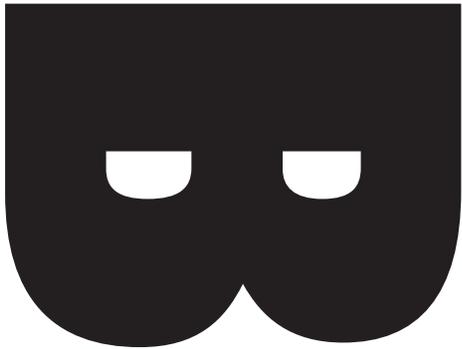
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NEW & OLD

I was recently in Denmark attending a Connect Alliance meeting which discussed “Print in a Digital World.” One speaker, Nokia’s Harry Santamaki, with the forward-looking title of VP-media industry—multimedia global, surprised the audience by stating that Nokia is the world’s biggest camera manufacturer.

In fact, according to a new Nokia study in 11 countries, 44% of those between the ages 15 and 34 use their mobile as their primary camera. And an amazing 67% expect their mobile to replace their MP3 player.

Santamaki is currently based in New York, working on a pilot program to offer free content via WiFi through the New York City Parks system. A large part of that content will come from *The New York Times*. This pilot will be expanded to one European and one Asian market later this year. And at this juncture, the media owners have the right to figure out suitable advertising options.

Yes, definitions of what is local or global are certainly changing in large part due to the Internet. This is no question that content is still key; however, we are increasingly seeing it delivered on any variation of screens that matches a consumer’s need for instant demand—whether via monitors, mobiles, PDAs, iPods, plasmas, or even in elevators.

According to MediaPost, the latest media enthusiasm is for digital out-of-home or place-based television, which features networked screens in stores, health clubs, office buildings, gas stations, public restrooms, and elevators. Apparently, this type of medium will account for \$1.2 billion in national ad spending in the U.S. in 2006. Its marketing appeal is the quality of television combined with a provocative purchasing environment.

Of course, the way we shop has changed, as has the way we interact with media and form opinions about brands. Yet, despite the lightning-speed developments, I was still conscious of listening to these discussions in Helsingor as I looked out to Hamlet’s legendary castle near some of the world’s oldest shipping lanes—still transporting product to “new” markets like Russia, Estonia, Latvia, and Lithuania.

REPLACING THE OLD-FASHIONED DIARY

I have had in the back of my mind for some time that

I wanted to take the time to regularly write a blog, a bit about work, a bit about family, and how my life is defined by how the two diverge and converge.

But as often happens, the plan never got close to the top of my priority list. I was reminded again of this when blogging came up in this issue.

I learned about the blog of Ogilvy exec John Goodman, who started sharing his thoughts last summer when he transferred from Mumbai to become president-CEO of Ogilvy Japan (johninjapan.typepad.com). He wrote in his first blog that he thought it was a good way to have some dialogue with people he doesn’t see otherwise as he assumed his new role. He has kept up his postings regularly, and you’ll find them an interesting read. (You can also read about where John vacationed this year in our “Holiday Snapshots” feature put together by Asia Editor David Kilburn starting on page 38.)

Blogs also came up in our Cover Story, examining how the Internet and new technology have changed the nature in the debate about global vs. multinational vs. local marketing. In studies in EMEA and the U.S., UniversalMcCann explored how widespread blogging is among frequent users of the Internet and their attitudes towards advertising on blogs, which were more positive than one might have thought.

Rapid changes in technology have affected all aspects of our lives, and just when we think the pace may slow, new developments allow us to do more of all kinds of things we do every day with smaller and smaller pieces of equipment. Still, according to the studies, television is holding its own. When asked which media channel they would miss the most if they had to do without it, heavy Internet users in the Germany, Spain, and the U.S. named television, while those in the France, Italy and the U.K. named online.

We hope you gain some insight from these pieces and would welcome your comments.

For me, a blog could be today’s version of a daily journal entry, but for others an old-fashion pencil and diary are still preferred.



deborah malone
PUBLISHER



nancy s. giges
EDITOR

This is not a holiday
It is a typical weekend
at your second home



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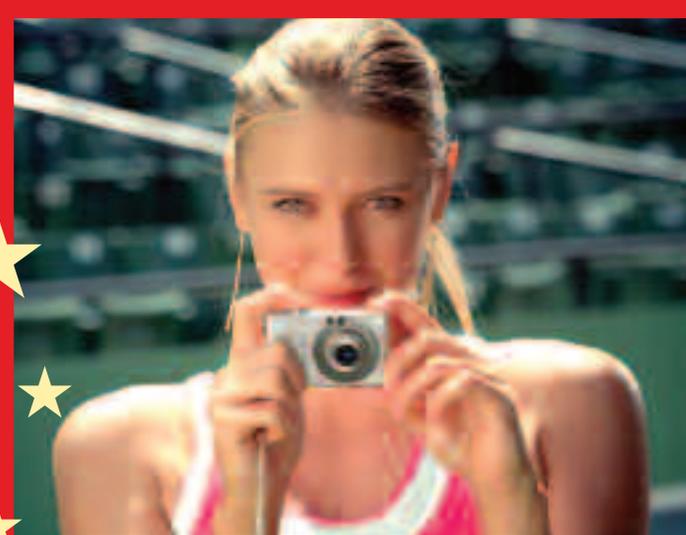
star power

When using celebrity endorsement, timing can often be everything.

Canon made the right call in continuing its 18-month relationship with tennis star Maria Sharapova, who recently won the U.S. Open in New York, for the Canon PowerShot.

The brand's latest campaign, carried out in traditional and new media as well as via guerrilla marketing, began running in the U.S. during the season of tennis' major international tournaments. Dentsu America, Canon's U.S. agency, developed a creative strategy building on the natural connection between Canon PowerShot and Maria to deliver powerful "shots" with incredible style and grace. Due to the U.S.' success, Dentsu agencies around the world adapted the campaign for their local markets, including those in Argentina, Brazil, Chile, Korea, Mexico, Singapore, Thailand, and Vietnam.

In South Korea, Cheil Communications is behind several campaigns featuring local and international celebrities. Hollywood stars, Pierce Brosnan and Gwyneth Paltrow, and Korean-American actor Daniel Henney have taken to the airwaves for fashion brands of Cheil Industries. And in China, a popular Korean actress and model Ji-hyun Jun,



continued on p. 8

success (sək-sēs) n.

- ¹ The attainment of wealth, favor or eminence.
- ² The degree or measure of a victory.
- ³ A favorable termination of a venture.
- ⁴ An event that accomplishes its intended purpose.



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OCTOBER 1-6
GOLDEN DRUM ADVERTISING
FESTIVAL & MEDIA MEETING

PLACE: *Portoroz, Slovenia*

RESERVATIONS:
www.goldendrum.com;
 386-1-439-6054

PRICE: *Various packages*

OCTOBER 5-8
MASTERS OF MARKETING
ANA ANNUAL CONFERENCE

PLACE: *Ritz Carlton,
 Grand Lakes, (Orlando), Fla.*

RESERVATIONS:
 1-212-697-5950
 PRICE: *ANA member US\$1,095;
 non-member US\$1,595*

OCTOBER 11
IAA U.K.
Henrik Bustrup, Xerox Europe,
speaking at lunch

PLACE: *Savoy Hotel, London*

RESERVATIONS:
www.iaauk.com;
Annika McCaskie,
44-20-7381-8777;
office@iaauk.com
 PRICE: *Member £65;*
member guest £75;
non-member £85

OCTOBER 24-27
THE CABLE & SATELLITE
BROADCASTING ASSOCIATION
OF ASIA
CASBAA ANNUAL CONVENTION
"FROM BANDWIDTH TO
BRANDWIDTH"

PLACE: *Hong Kong Academy for
 Performing Arts*

RESERVATIONS:
www.casbaaconvention.com;
Konstancija Ruza, 852-2167-8040;
konst@brandedasia.com
 PRICE: *Member US\$1,095;*
non-member US\$1,280
excluding Charity Ball



who has been appearing in ads for Samsung Electronics' Ultra Edition cell phone in Korea will extend her reach across the greater China region.

Galaxy, a leading men's business wear brand, launched a series of three TV spots featuring Brosnan. The theme of the ads is "how to wear a suit." The first is titled "Amateur" and shows Brosnan giving fashion tips to Korean men. The minimalist spot is set to accordion music and features subtitles (in Korean) of Brosnan's advice to Korean men. Among his advice: "You are young. You probably want to follow the trends. Change is good, but you have to keep to the fundamentals. You must not look like an amateur."

The second spot, titled "Two Seconds," deals with the idea that the impression a businessman makes on a contact is determined in the first two seconds of when they meet. The third, called "High Heels," deals with the idea that a suit is a measure of a man's style in the same way that high heels are the measure of a woman's style.

For Bean Pole International, a leading fashion brand for families, Paltrow and Henney are continuing in a new series of TV spots presenting Bean Pole's latest look as "the London urbanite." The idea is that London urbanites create their own style by borrowing from different cultures and traditions, creating a new look that reflects the multicultural yet traditional nature of London.

The Samsung cell phone campaign showcases slim, Ultra Edition handsets. Samsung Advertising Beijing, Cheil's subsidiary in China, is heading up the localization, media buying, and planning for the campaign.

"Ji-hyun Jun is one of the leading figures in the Korean wave, the surge in popularity of South Korean stars around all of Asia over the past five years," said Lisa Zheng, a senior advertising executive at Samsung Advertising Beijing. "She will lend considerable star power to Samsung's Ultra Edition campaign in China." Her stylish image is a great match for the Ultra Edition cell phones, she said.

The first TV commercial featuring her in mainland China shows the actress surrounded by slim objects and seducing a man in a bar by sliding one of the super-thin handsets under his hand. The TV spot, as well as print and outdoor ad, is also running in Taiwan and Hong Kong. Samsung Electronics markets its handsets under the Anycall brand in the Greater China region. ●

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F R O N T L I N E S



friends of the garden

When the Singapore National Parks Board chose Grey Global Group for a campaign to help it attract hundreds of thousands of visitors to the Singapore Garden Festival, the agency recommended this approach, called "Friends of the Garden." "By using animated characters that bring a smile to your face, the Singapore Garden Festival feels like a cool and fun event for the whole family, not just something for botanists and horticulturists," says Subba Raju, CEO of Grey Global Group Singapore.

The creatures were created using the latest 3D animation software. "Each friend looks as life-like as possible yet is charming and adorable," says Raju. Some 200,000 visitors are expected to attend the flower and garden show in December. The ads are appearing in newspapers and as posters in many venues. ●

guides & surveys

- Publicitas Promotion Network has published a "Global Guide to National & Pan-National Media Surveys." The publication provides an objective, easy-to-read overview of each of the main media surveys available in a country or a region. It covers the major national and pan-national print-media surveys around the globe. Other trends, charts, and rankings are also included in the guide, which is available on CD-rom for €99 plus shipping.

- New research by the International Federation of the Periodical Press (FIPP) on the success of business-to-business publication Web sites has found that around 66% of Web sites surveyed are profitable compared to only about 25% four years earlier. Correspondingly, the proportion of sites operating at a loss has fallen from about 50% to less than 20%. The survey aimed to examine good practice online among publishers of printed b2b magazines worldwide. More findings are available for free at www.fipp.com/publications. ●

ORANGE

has teamed up with *National Geographic* to promote to Europeans across the continent the benefits of traveling with Orange. The media owner, working with Orange's agency Fallon, created print ads and TV vignettes using National Geographic's photographic imagery and TV footage.



Each spot focuses on a wild animal and some of its behavior. Orange is identified only at the end of the spot with a tagline such as "Enjoy traveling with Orange." The ads are also integrated onto a microsite at www.orange.com/travel. Media agency is MPG International.

Liz Stainthorpe, Orange worldwide brand communications director, says, "Our aim is to shift perceptions of the brand among both leisure and business users, demonstrating that Orange is the right choice for all their travel communication needs." ●

performance (pər-fôr'məns) n.

- The ability to perform.
- The fulfillment of a claim, promise, or request.
- The manner of reacting to stimuli.
- The execution of an action: an accomplishment.



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www.esomar.org

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workshop €350

OCTOBER 26-27
WORLD DIGITAL PUBLISHING
CONFERENCE & EXPO
WORLD ASSOCIATION OF
NEWSPAPERS/WORLD EDITORS'
FORUM CONFERENCE

PLACE: Hilton Metropol
Hotel, London

RESERVATIONS:

www.wan-press.org;

33-1-47-42-85-00

PRICE: Member WAN/WEF/INMA

980; W AN Association; €1,200;

other €1,450

OCTOBER 30-31
ITV-INTERACTIVE
TV SHOW EUROPE

PLACE: Maritim proArte Hotel, Berlin

RESERVATIONS:

www.itvshoweurope.com

PRICE: £1,395

OCTOBER 31
MEASURING AND PREDICTING
ENGAGEMENT SEMINAR
ADMAP

PLACE: The Crown Plaza Hotel,
London

RESERVATIONS:

Clare Beveridge 44-(0)1491-418-614

PRICE: US\$1,187.50 plus VAT

November 9

IAA N.Y.

Don Friedman, CMO, Computer
Associates, speaking at lunch

PLACE: The Princeton Club,
15 West 43rd St.

RESERVATIONS: www.iaany.org;

1-212-338-0222;

director@iaany.org

PRICE: Member \$85; member guest

\$95; non-member \$115

continued on p. 44



revving up

With the purchase of autos in China rising rapidly, automotive-related products are in big demand. According to Ogilvy & Mather, China's lubricant market is expected to grow by 10% annually for the next five years.

To capture some of the growth, BP's Castrol has launched a 30-second branding campaign in China aiming to take share away from local players that dominate the market. (O&M reports that foreign companies, such as BP, Esso, Mobil, and Shell, currently have just one-fifth of the market.)

The Castrol campaign, called the "Green Road" reflects the company's 100-year heritage as a lubricant specialist company and its understanding of the relationship people have always had with their vehicles—whether car, bike, truck, or plane. The commercial combines archived footage with new film to describe the brand's historic journey in lubricant technology advancement and aims to gain acquaint consumers with the brand and what it stands for. The spot ends with the tagline: "It's more than just oil. It's liquid engineering."

Originally created for the China market, the campaign tested so well it will run in 18 markets across Asia Pacific and the Middle East. O&M and Mindshare Shanghai are agencies for the brand. ●



regulations

THE EUROPEAN COMMISSION has announced plans to require airlines to advertise on their Web sites the full cost of tickets, including fuel surcharges, taxes, and processing fees. Proposals would also ban airlines from charging customers differently for online bookings in different EU member states. If approved, the rules would apply starting next year.



Various groups continue to explore food marketing issues, the European Association of Communication Agencies reports. The EUROPEAN section of the World Health Organization has proposed an international code on food marketing that would include the adoption of regulations to substantially reduce the volume and impact of food advertising to children and the development of an international code on food marketing. In IRELAND, The Irish National Heart Alliance and the Irish Heart Foundation have called on the government to introduce restrictions on food advertising to children. In the U.K., a coalition of industry organizations is supporting the government's proposals to reduce the exposure of children under 10 to food advertising. The group supports restricting the volume of advertising on children's television channels and during periods when children are most likely to be watching TV. The industry is also prepared to agree to a ban on the use of licensed characters in food advertising as well as to a ban on the use of celebrities who could appeal to children. •

insight into men in india

What should marketers do to reach the highly desirable target audience in India of men ages 40 to 45? To find out, Grey Worldwide India and its planning division Grey Cells surveyed 1,400 urban professionals, earning a minimum of one million rupees annually. The agency came up with seven key recommendations:

- **Tap into India's current economic optimism and the nation's growing opportunities, focusing on heightening positives.**
- **Think plural.** For a variety of categories, including high involvement categories such as cars and appliances, the buying process has become more democratic. Brands need to convince the whole family.
- **Embrace the idea of a more sensitive man.** This group has begun to accept that it's all right to pursue activities beyond those traditionally deemed as distinctly male. This may open up opportunities in newer categories, for example, convenience cooking products.
- **Capitalize on the romantic opportunities between husbands and wives.** This is a largely untapped emotion by the Indian marketing fraternity.
- **Create new products and brands just for him.** New products can fill the void left by women having more control and choice in general. Personal indulgence products, high tech, and entertainment products need to tap into this reality.
- **Focus on new themes in the entertainment space.** Important themes will include connecting with friends, freedom from chores, and freedom from the mundane routine.
- **Work with work.** As these men take greater control of their careers, the workplace will become an important new theme in communication. Brands that can create an emotional appeal based on the career desires and ambitions of these men will communicate very effectively. •

banks have highest online member registration rates in japan

Some 76% of respondents to a survey of 4,864 adults in greater Tokyo said they have online membership with at least one company in the 20 industry categories surveyed by Hakuholdo's research & development division. By industry, banking has the most members (35.9%), followed by tour companies/travel agencies (23.7%), and airlines (21.2%). Other industries that have attracted 10% to 20% of respondents as members include CD shops, mobile carriers, IT equipment vendors, alcoholic beverages makers, securities firms, and automakers. •

business (biz'nīs) n.

- ¹ The principal activity in your life that you do to make money.
- ² One's rightful proper concern of interest or responsibility.
- ³ The occupation, work, or trade and the people who constitute it.
- ⁴ A serious endeavor requiring time and effort.



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How has digital, and new technology of the debate about vs. local

Industry execs weigh in,
and some UniversalMcCann
research explores how consumers
in Europe and the U.S.
are using the Internet
and related technologies.



julie
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dirk
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altmaier



the Internet changed the nature global vs. multinational marketing?



rob
norman

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on target with the new online consumer

Recognizing the shifts taking place in the way that individuals choose, consume, and publish media content, UniversalMcCann in two separate studies, one in EMEA and one in the U.S., talked to consumers to explore the impact of how they are using the Internet and related technologies. The EMEA study concluded that Web 2.0 developments, enabling consumers to create and share content, and the explosion of high-speed broadband are having a big impact on Europe's online consumers behavior, their methods of social interaction, and their media consumption.

julie woods-moss
Vice President-Marketing
BT GLOBAL SERVICES



One of the defining realities of the digital networked economy is that it's become much harder for marketers to reach customers and influence their decisions. Gone, for example, are the days when the U.S. tuned into three TV networks, and marketers from General Motors to Procter & Gamble preached to the American nation in the breaks. Today's audiences are much more sophisticated and have a much broader range of entertainment and information services to choose from.

But that's not the only challenge. Markets have become incredibly complex. Over the past decade, for example, the levels of competition have tripled in most industry sectors, and product life cycles have reduced by 70%. Many of the products and services on offer today hadn't even been thought of a few years ago.

So what does an ambitious marketing director have to do to survive—and thrive—in the digital networked economy? Clearly, there is no one-size-suits-all solution, but here are three key recommendations:

- The first is to listen carefully to your customers and respond to their input. You need to get inside the customer's head—to look at your company using their eyes, not yours. Customers are no longer just the passive recipients of your marketing ideas. Indeed, in the digital networked economy, it is often they who dictate the terms of your relationship.
- Point two is to get personal. The figures show that customers respond best to offers that relate to their individual needs and circumstances. While blanket marketing typically delivers a response rate of between 1% and 5%, for example, marketing that's linked to an event such as a birthday or the anniversary of a previous purchase can be five times more effective. Marketing that's tied directly into the conversations you have with customers is even more effective—10 to 20 times higher than for traditional marketing campaigns.
- Finally, exploit new technology to the full. In the digital networked economy, you can monitor customer demand in real time, detect changes in behavior, and react to them quickly. Marketing campaigns don't have to be locked in months in advance: They can be adjusted as purchasing patterns change and new opportunities open up.

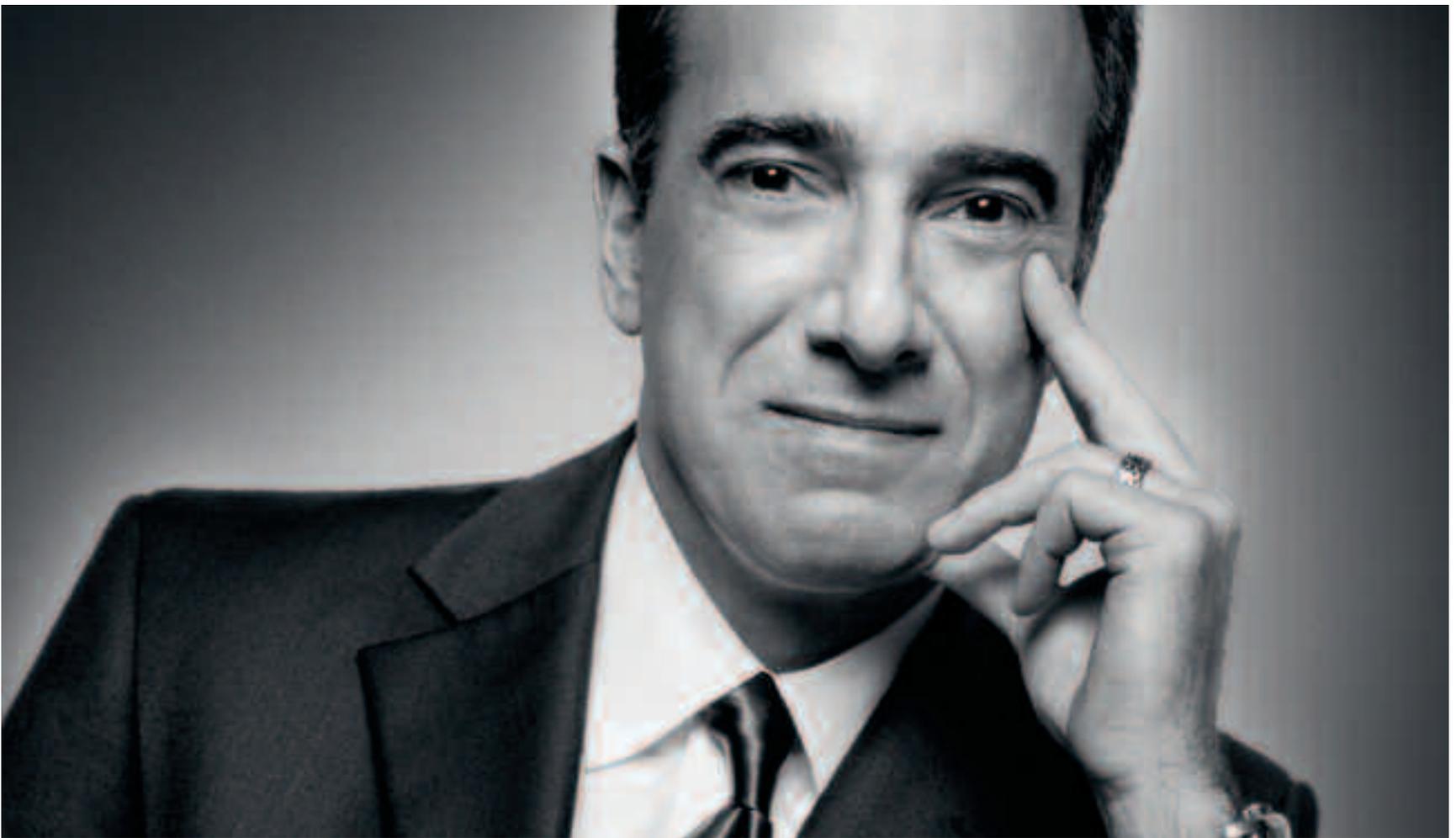
Yes, marketing is different now. Arguably, it's become a much more demanding profession—one in which an understanding of what technology can do is as important as the ability to shape offers that appeal to customers. But is marketing the worse for the change? Some may regret the passing of simpler times, but I, for one, find the new challenge invigorating. ●

In the U.S., the study found that **technology is replacing music as the great divide between generations**, in other words, the source of the "generation gap." Digital media fluency is dominating modern day culture among the younger, tech-savvy segment, who are leading the way in adopting new media platforms. In both regions, the Internet has become the new way to socialize.

For marketers, it's clear that building online as a core component in their communications is important. However, the studies indicate that consumers are still relying on traditional media formats and will continue to do so. But as more and **more media consumption and content move to a digital platform**, the lines between media owner, advertiser, and consumer begin to blur, opening up new ways for advertisers to communicate. The research shows that consumers not only accept online advertising and understand its benefits, they value it as a source of information.

In EMEA, the study was conducted among at least 1,000 consumers, ages 16 to 44 and frequent users of the Internet, in each of five countries—France, Germany, Italy, Spain, and the U.K. This was representative to the online population in each market. In the U.S., the survey was conducted online of 1,000 heavy Internet users, ages 16 to 49, representing about one-third of the U.S. adult 18-49 population.

Source: UniversalMcCann



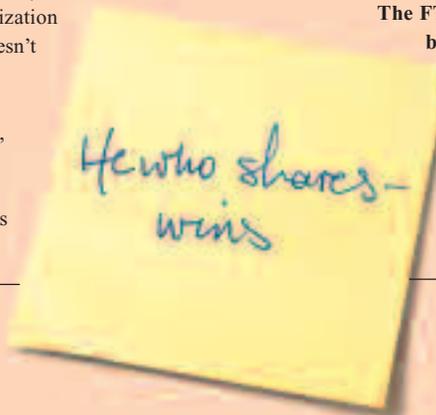
THE ART OF BEING GLOBAL – Jim Speros – Sr.VP & CMO, Marsh & McLennan Companies

He's an innovator known for getting things done. He makes this happen by bringing the right people together at the highest levels of collaboration. Here he shares his thoughts on big picture thinking, and what he carries in his wallet.

Being international doesn't make you global. Being global is more about influencing attitudes and behaviors versus location. It also implies a two-way street: the influences born from one culture are shared or diffused to another.

The big challenge for any global company is in following through on ideas. Marsh & McLennan Companies are dedicated to offering the best services and people from across our individual companies. The way to succeed globally is to create big innovative strategies with a die-hard focus on execution. Teamwork makes this happen; understanding people is the key.

Face to face is critical. Globalization may bring markets closer, but it doesn't necessarily bring them together. Technology, as impressive as it is, can only get you so far. So people, especially those with different cultures, need to dedicate time to understanding one another. It is this understanding that bridges gaps.



I travel a lot, visiting our offices and clients around the world. No matter where I go, I have found that there is nothing more real, or important, than 'being there'.

You still need to remember where home is. No matter how much I travel, I'm still a family guy. My wife and I have two beautiful daughters and I take memories of them wherever I travel. They remind me of the important things. Business leaders from other parts of the world feel the same way when we talk; the most important thing in your wallet should be your family. On that level you can bond with anyone, anywhere.

The FT offers a perspective premised on 'global first, business second'. I get from it the most relevant

and up-to-date global perspective on everything that influences business, politics, and international finance. It helps guide my thinking because their starting point is 'global first', so the issues are always offered in context of the big picture, as opposed to simply presenting me with a local view. And 'big picture' thinking is what being global is all about.

This is one in a series of reflections by leading marketers, who are also regular readers of the FT. The series can also be found at FT.com/toolkit/globalview

A global view for a global world

FT FINANCIAL TIMES
.com

julian boulding
President
THE NETWORK ONE



The first ten years of the widely available Internet—let's say, 1996 to 2006—clearly favored the trend towards globalization.

Once a dot-com Web site became visible to anyone in the world, the notion of separate national brand and communication strategies became more or less unsustainable. Maverick country managers, developing their own brand communications strategies, largely disappeared.

The global agency networks prospered, of course—and so too did the “global independents,” like 180, Bartle Bogle Hegarty, and Strawberry Frog, which discovered that once creative materials could be distributed electronically, traditional networks were no longer necessary.

We might suppose that as the Internet enters a more mature phase, including instant transmission of all forms of audiovisual communication—movies and games as well as verbal information and jpegs—this trend would accelerate.

Curiously, the opposite is happening. Local is growing in importance. The difference is that local is no longer defined geographically. Before our eyes, a major shift is happening in the way leading advertisers are planning their communications programs.

The traditional model was to launch a campaign with mass media communications (television, if possible) and cascade the campaign theme through support media, direct mail, and point-of-sale activity.

Today, the Internet allows us to reach discrete, carefully targeted groups of opinion leaders and influencers with individualized messages to create word-of-mouth and buzz long **before** mass advertising arrives.

These are the people who determine the success or failure of brand launch or campaign. It's no more or less than the mechanism described in Malcolm Gladwell's “The Tipping Point”...but now available in a proactive version.

There's no mystique about how to reach them: Trend-spotting agencies know where they congregate, where they surf, what they watch, where they like to go and be seen. Viral communications can now be tracked; coverage, frequency, and awareness measured.

Specialist media agencies have arisen to seed viral communications and the use of community sites and others to build genuinely multimedia CRM programs, tracking individuals through mobile communications, e-mail, social networking, and other Web usage and participation in sponsored events. (Oh, yes, and postal mail too.)

The Internet is the medium of choice today, but as TV programs, mobile communications, and games switch to downloadable formats of similar quality, these will quickly join the mix.

Mass advertising (television, etc.) is no longer the starting point of a successful campaign, but rather is assurance for risk-averse consumers: The word they heard on the street is now legitimate and mainstream.

Sounds simple?

It isn't.

Because the world of these new spotters, creators, and seeders is very different from the world of traditional advertising agencies.

In fact, you won't find these people in traditional advertising agencies. You'll find them in companies like The Barbarian Group or Max Weber or The Viral Factory.

Because the electronic agency world is no longer labor- or capital-intensive, the creative agencies tend to be small, and the personnel change fast. They don't **need** to work in big companies and often don't **want** to work in big companies.

Will this still be true in 2016? I think it will.

The next generation of agency networks will be small-scale aggregations of talented specialists and original thinkers, accessing global expertise rather than owning it. Not retrofitted to existing legacy networks, but custom-built by innovative and adventurous marketers.

It's going to be a very interesting time. ●

rob norman
 Director, Interaction Worldwide
 GROUPM



A few years ago the *New Yorker* published a cartoon of a dog in front of a PC. The caption read “on the Internet no one knows I’m a dog.” For brand owners, the reverse is true; on the Internet everyone knows if your brand is a dog (or not). Put simply the www prefix, regardless of the domain suffix, democratizes information to a degree that makes geography redundant and moves advertisers to a place where they may not be altogether comfortable. The Web gives the consumer an unobstructed view of companies and brands, and it becomes a corporate imperative to ensure that the view is consistent with consumer expectation and capable of being delivered by the enterprise wherever it needs to do so.

The rapid transfer of information across invisible borders also allows consumers to participate in the creation or destruction of brand and corporate reputation. On the principle that if good news travels fast, bad news travels faster, it pays to know about your labor policy in Indonesia before someone else blows the whistle.

Yet in all this, brands exist in the context of real life, and real life is lived locally and nationally: It often depends on distribution; it depends on infrastructure; it depends on cultural context; it depends on when as well as where. September in Spokane is not necessarily the same as March in Moscow. As much as I may love the infinite choice of the infinite network, I also like to know that the object of my desire can be obtained in a store near me, in a currency I actually have in hand, and with an operating manual in a language I speak.

So has technology changed the nature of the debate about global, regional, local? Not really. Just because you can deliver a global message does not mean you should. Marketing—it’s a dog’s life. ●

In EMEA, Web 2.0 and related applications are giving consumers three key benefits:

Control: The opportunity to view content when they want it and the ability to personalize their online experiences and purchases according to their own preferences.

Collaboration: Projects, such as Wikipedia, show that consumers have the will and the means to work together towards common and non-commercial online publishing objectives.

Creation: Although it’s early days for blogging, nearly one-third of the sample of frequent Internet users, to a greater or lesser degree, created their own Web site.

Source: UniversalMcCann

dirk eschenbacher**Executive Creative Director
OGILVYONE WORLDWIDE**

Rewind to 2002, BMW Films. One of the most innovative, most talked about and most viral branding campaigns ever run. When the creators, Fallon USA, were briefed to develop a groundbreaking new advertising campaign, the client and the agency were brave enough to think big. We all know BMW films. Today, more than 30 million people have viewed the short movies online. But in fact, it didn't stop there. When I walk into my Beijing neighborhood DVD store (of course all titles here are counterfeit), the BMW films' DVD is still on the best-seller rack where it can find a buyer for 10 yuan. It's an example of how a very early digital campaign, executed in a big way, had an immense reach, far beyond the original U.S. target market.

The ubiquitous availability of digital media and content has brought tremendous opportunities to marketers. What cost a fortune only four years ago is now almost free. With the right strategy, making use of Web 2.0 applications like blogs, picture- and video-sharing sites and taking into account the big consumer trends like co-creation and community, a campaign can take off on its own. That's without much media spend and without the need for expensive content production. A brilliant example, the recent Smirnoff Tea music video from Bartle Bogle Hegarty, which was posted exclusively on YouTube and within a month, already reached an audience of more than a million.

Digital media, and especially the Internet, by default offer access to a global audience. For better or for worse. Starting a global discussion about a brand or a product can lead equally to great benefits and to dramatic disasters. Both have plenty of examples.

The real trick today is to make smart use of a global digital platform and extend the campaign down to a locally relevant message in order to trigger interaction and get measurable results. When Ogilvy and Dove launched the "Campaign for Real Beauty," such an approach paid off well. While the print, TV, and outdoor campaign used locally relevant messages and visuals to start a discussion about the definition of beauty, the Web site offered a global platform for women of all countries, nationalities, and races to express and share their views. Today, more than one million targeted consumers cast their votes, posted notes on bulletin boards, and became brand ambassadors by regarding Dove as the trusted sponsor of this real debate.

Digital channels and content are a great opportunity for global branding. Going forward, however, it is important to understand that while technology enables consumers globally to join the discussion, the relevance of the message increases by narrowing down the reach to geographically relevant areas. While conceptually everything will be available for everyone, digital realistically is regional, national, or even local. Reading my favorite newspaper online, getting local news via email, the weather report on my PDA, and the right location-based promotion message on my mobile phone will make a lot of sense in the future. With Google and other search applications adding their "local" tab to the search bar, it is obvious that the biggest power of digital is not necessarily the macro effect a global campaign can have but the narrow casting and its relevance to the consumer. ●

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Key U.S. findings among frequent Internet users:

monika altmaier
Project Leader—
Internationalization
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Tough global forces, such as international competitiveness, cost pressure, declining deadlines, customer focus, fast product cycles, innovation demands, and continuously increasing globalization are driving companies to do business internally in a different way—in transnational virtual teams. New technologies have changed the way of working and living, and clients and agencies have to adapt continuously to further changing business environments, such as the rise of China and India.

As global business time is 24 hours a day, 365 days per year, this will heavily affect marketing communications and branding from an agency and client perspective and will create more overlaps in different agency businesses. We see that constant accessibility, even on the road and during leisure time, makes it possible to delocalize the workplace: People can work and network from anywhere in the world and buy from the most remote places in the world.

Not only multinational companies but also small- and medium-sized enterprises are able to offer more and more personalized and tailor-made products, solutions, and services online. They are able to reach even fragmented customer groups, wherever they are, through different channels within their media mix as this mix will be shifted more and more towards new innovative channels. That will depend, of course, on the markets you are in as the needs are diverging.

This digital explosion has and still will dramatically change the way clients engage with brands. That is why companies have to adapt, improve, and localize their marketing communications and develop more and more intercultural sensitivity to meet the growing needs of consumers to survive and grow in different markets.

The worldwide accessibility has knocked down territorial borders. This implies also a change of mindset within the agencies and clients as adaptation/localization and new creative ways (thinking outside of the box) in implementation become a prerequisite to increase value for both sides. Therefore, it is a top-of-mind concern for global advertisers to figure out how to engage local consumers. ●

The Internet has become the new way to socialize: About 40% of people ages 16 to 34 belong to a social network site, twice the percentage of 35-49-year-olds.

Blogging is the voice of the new generation: 71% of people ages 16 to 34 have participated in blogging; they are three times more likely (25%) than people 35 to 49 to manage and/or write their own blog.

File-sharing is commonplace and hints at future electronic social interaction beyond the written word: One-third of people ages 16 to 34 have participated in peer-to-peer file sharing compared to just 12% of people 35 to 49.

While forms of social interaction are quickly changing due to new technology, other types of emerging media are being embraced at a slower rate even among the younger segments: Just 10% of Internet users ages 16 to 34 say they have used IPTV and only 14% have used voice over Internet protocol.

Despite the emergence of new media platforms, consumers continue to bond with television and other traditional media: When asked which information source they would miss the most, television came out on top (27% of those ages 16 to 34 and 29% of those 35 to 49 saying they would miss this medium the most). Web sites were close behind, but still No. 2.

Source: UniversalMcCann

frank haveman
Strategy Director
BSUR AGENCY

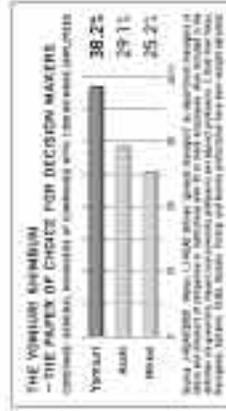
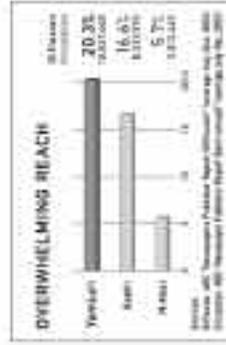


I do not think the nature of the debate has really been changed with the rise of the Internet and new technologies. The nature of the debate has always been about the benefits of global standardization vs. local adaptation. It has always been clear that a successful brand has to do both. The rise of the Internet has merely made this clearer. The Internet brings transparency and global access to all sorts of information. This puts pressures on global brands with different positions in different markets and will stimulate the need for one global brand identity. You could say this will stimulate globalization (or standardization). On the other hand, the Internet and new technologies increase the possibilities for more targeted, personal, and local brand communications. You could say this will stimulate local marketing (or local adaptation).

Thus, the brands that do not have the right balance between global and local will be in trouble. It simply will not be credible any more to have one brand with a premium proposition in one market and a budget proposition in another market. And as people will get used to more personally relevant brand communications, it simply will not work any more to have one global campaign. ●

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scott berg

Managing the global media for a company as diverse as Hewlett-Packard is no easy job

Scott Berg hasn't got an easy job. As director of global media for Hewlett-Packard, he is more like the conductor of a symphony than a media director. That's because of the diversity of the business groups of the technology company.

Defining the individual operations of its personal services, imaging and printing group, and tech group on a country-by-country basis worldwide could result in cacophony.

"We might have a string section playing a different tune than a horn section, but it all comes together in the end because everybody's marching to the same song," says Berg.

That song is HP's overall center strategy of making life simple for the customer in each unique marketplace, whether it is a PC user, a large company buying data storage, or complex printing and publishing customers.

"If you were to look at our breadth and width and depth, we are the most massive tech provider in the world today," says Berg, bringing to mind HP's products ranging from simple PCs to the sophisticated systems that run stock exchanges around the world and the tech support that keeps them all operating 24x7.

HP's \$88.9 billion bottom line is poised to overtake IBM's longtime hold on the market lead in the next few months.

Yet, at a time when other corporate giants are standardizing their global messages, HP is moving in a different direction.

"Each region and each country are unique in customer base and the way customers use technology, so we localize much of what we do," Berg explains.

"Really, everything needs to be at the local level," he elaborates. "That's where it makes sense because every single market is unique and different.

In Bangkok, Warsaw, New York, and Tokyo, each one of those is an extremely unique marketplace with unique challenges, technology, products and services," he says.

Berg admits he is perplexed when he tries to define where media starts and stops anymore. The reason: because of the "massive pool of data and networking" that helps define customer touchpoints, he says.

Take China, for example, where advice from family and friends is the No. 1 touchpoint driving customers in the market for printers. The second most-used resource is television advertising, Berg says.

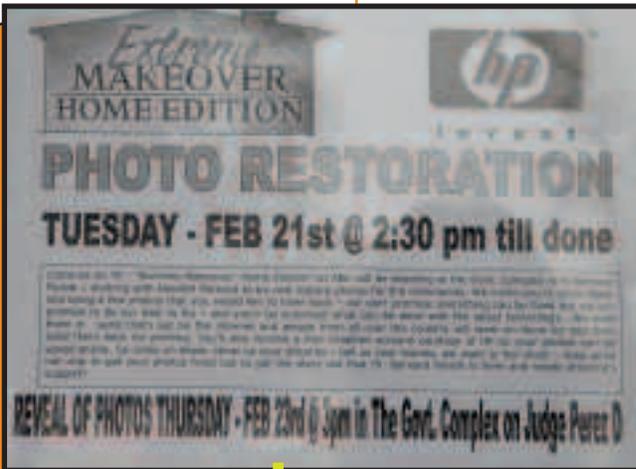
"The last place they look is the Internet, probably because the television market has only recently opened up in China, and TV advertising is actually entertaining for them, while the Internet is still heavily censored," Berg says.

Buying a printer in the U.K. is very different. HP's market research shows "that consumers go to the Internet first, with a "huge focus" on Internet resources. Talking to family and friends is a distant second, and television advertising is a negligible resource for British consumers' technology purchase decisions.

Berg wants to embed HP and its products in the cultures where they are sold and, even deeper, if that's possible.

Scott Berg says while all advertising and promotion is centered on "making life simple for the customer," localization is the only way to go "because every single market is unique and different."





HP touched the lives of the victims of Hurricane Katrina by joining with ABC's "Extreme Makeover: Home Edition" to invite people to bring photos for restoration.

HP flew a team of 300 experts and equipment to restore photos on site.



The photos were placed in scrapbooks housed on HP's Snapfish online photo service.



"We want to intertwine our products into the day-to-day lives of people," Berg says.

He is proud of a U.S.-based effort that did exactly that and found a unique way to get its message past the 87% of DVR owners who buzz through commercials. In one unique project, HP embedded itself—its Snapfish online photo service—in the programming itself.

After the devastation of Hurricane Katrina in August 2005, residents of the Gulf Coast region were wounded in many ways. But perhaps one of the most painful losses was the loss of irreplaceable family memories and photos.

Teaming up with ABC Television and its popular show, "Extreme Makeover: Home Edition," HP flew a team of 300 experts and their equipment into the region and restored water—and mold-damaged photos—and created new—and safe—online scrapbooks through its Snapfish service—to very grateful families.

"I admit, when the episode aired, it was a real tear jerker," he says. "But it was so rewarding to be a part of making people's lives just a little bit better."

The message of the Katrina project was to show people HP's heart and at the same time communicate a message to the consumer, actually physically showing them how easy it is to use HP technology. Berg says: "We're not putting it into a print ad anymore. This is the next step: We are seeding that message and letting them see it."

What HP did in the U.S. was uniquely American. "Russians or Chinese or Argentines would think it was a nice gesture, but for them, the photo restoration project wouldn't have the emotional depth it does in the U.S.," he adds.

The thinking was similar behind another project. Partnering with the Discovery Channel in Europe for its popular Virtual History series, HP took old photos and, with the help of live actors, re-created the events of one day from World War II, July 20, 1944, the day Hitler's generals attempted to assassinate him. On HP equipment and software, the two partners combined existing photographs, film footage, and advanced computer animation, marrying archived photos and film footage with modern-day re-enactments to create a unique program that brings the viewer right into

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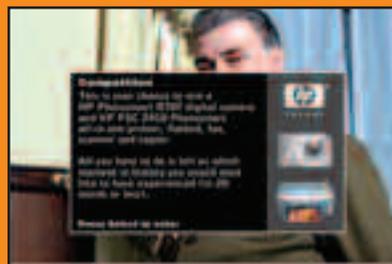
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HP was connected to the Discovery Channel Virtual History program on Hitler in Europe not only in advertising but also in extensive media coverage.



the action. HP ran corporate ads, but its role in creating the program was prominently mentioned in press coverage of the program.

As a high tech company, it's not surprising that HP is putting its money on the line for high tech means of reaching customers. "This is a new age of media and media budgets," says Berg.

His overall marketing budget is about the same as it was during the days of mega TV advertising, but "the media mix has dramatically changed," explains Berg. "We still buy television, but it's not our biggest priority anymore."

At the end of fiscal 2005, HP had put 10% of its global advertising expenditures into interactive. "That's a pretty good chunk of change," Berg concedes. "But we saw the value of moving more to the interactive space because our customers were there. At the end of the first quarter of 2006, we were spending 20% of our budget on interactive and at the end of the second quarter, it was up to 31%."

If Berg is the conductor of HP's global symphony, London's ZenithOptimedia is the composer.

"Everything lines up behind them," says Berg.

Zenith gets a great deal of help from Goodby Silverstein, McCann, Performex, Publicis, and Zed for search marketing and some small agencies affiliated with larger networks in some countries.

"We like to keep it to a fairly small number of agencies to make sure of congruence among those agencies," Berg adds.

Berg joined now-HP affiliate Compaq ten years ago as director of national marketing for its re-seller side, 80% of the company's business. He moved up to director of worldwide and database marketing and built Compaq's customer prospect database before the company merged with HP.

After the merger, he was involved in bringing the two companies together, and three years ago, he moved to HP's global media position.

"Perhaps my days with the database at Compaq influenced me to be so aware of customer segmentation," Berg says.

Berg is quick to admit he doesn't have all the answers to today's marketing challenges.

But he and HP have capitalized on his core philosophy: "Be where the customer is. Fish where the fish are, and you'll be okay." ●

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it's the engagement, stupid

Predicting the future has always been a difficult business. This leaves the modern marketer in something of a pickle. The sheer speed of technological advancement has forced us into almost daily crystal ball gazing. Many grand predictions have been made in a bid to maintain marketing's relevance and credibility in the face of such rampant change.

But before swallowing wholesale any bold theories of the future, one should first take a look at Japan, where digital convergence is at a stage more advanced than perhaps anywhere else.

Because if Japan is anything to go by, then the new media landscape may not be quite the "Brave New World" that many crystal ball gazers have been predicting. In fact, it seems that the converged world may be far more familiar than anyone could have ever imagined.

What's driving this is the fact that although the media landscape is changing seemingly by the second, the basic drivers of consumer behavior remain the same. And so while we run and stumble to keep up with consumers, we should be careful about being too reactionary. Because people are still entertained, engaged, and, moreover, annoyed by the same things as ever—and it doesn't look like this is about to change too fast.

Perhaps the only real change with the past is an ever increasing need for quality. Before marketers could rely on interruptive media to blast their message through. Today there is no replacement for quality. Only quality communications deliver the necessary level of *engagement* to lead to behavioral change and business success.

the revolution is being televised

The end of television, according to many, has been in the cards for sometime now.

But a foreigner who visits Japan in 2006 for the first time may well be tempted to think that this is a country with a spiraling addiction to TV. Spend 24 hours in Tokyo, and you'll be washed away in a wave of visual content.

TV used to be confined to the home, but now it accompanies city life anytime, anywhere. You'll find people watching it on their iPods, PSPs, and their laptops. And since April 1, you can even find people

watching digital TV broadcasts on their *keitai*, or mobile phone.

Moreover, you'll find it dominating the big urban meeting points (check Shibuya's resplendent scramble crossing) and following you on almost every journey you take—in cars, taxis, trains, and even elevators.

Gill Scott Heron, the civil rights movement soul singer, once asserted that "the revolution will not be televised." I'm not too sure if he could say that in Japan today, as it is often the television itself which seems to be the heart of the revolution.

What did the now globally infamous Takafumi Horie of Livedoor try to do to expand and accelerate his Internet business, as well as his personal fame and fortune, in 2005? He launched a hostile takeover of Japan's biggest commercial TV station, Fuji TV, of course. The only recent news story to rival this national event was his subsequent arrest and imprisonment.

This ever-growing ubiquity and newsworthiness of TV contradicts much of modern marketing's future predictions. TV's dominance, so the story goes, is coming to an end as channels multiply and fragment and as people use PVRs to watch only the programming they choose, thereby editing out that which is of no interest to them (i.e. commercial messages).

But while there are undoubtedly many new hurdles and pitfalls that marketing will have to learn how to navigate, digital convergence in Japan would seem to suggest that TV's dominance is far from over.

We are well on the way here to becoming a fully screen-based, as opposed to a page-based, society where the opportunities to view TV content increase exponentially. Thus, while we may see a decline in the centrality of the in-home TV, the medium as a whole is experiencing

“ Perhaps the only real change with the past is an ever increasing need for quality. ”



B Y J O N N Y S H A W

nothing less than a renaissance. In 2006, TV's influence on Japanese consumer culture is stronger than ever.

Brian L. Roberts, the CEO of Comcast, recently commented, "The computer has crashed into the television set." This does have some pretty scary implications for traditional business models, but it is only good news for consumers. It allows them to watch more of the TV they love, more of the time.

from the age of interruption to the age of ambush

Perhaps the most established orthodoxy of modern crystal ball-gazing marketing is the paramount importance of 360-degree communication. Recently at Adfest in Thailand, Tatsuro Sato and Yoko Tanaka of the Japanese agency ADK made a presentation on how Japan is a paradise for 360-degree communications. But away from the grand set, pieces such as scramble crossing the streets of Tokyo rarely feel like a paradise. On the contrary they often feel polluted—and not just with the fumes and the dirt of the metropolis, but also with communication.

Modern Tokyo is polluted with the same old messages hitting you in the same old way wherever you go. As you go through your day, it can often feel like you are being mugged by marketing.

This is the inevitable destination of 360-degree-obsessed thinking. Running scared from the certainty of being able to interrupt consumers while they watch TV at home in the evening, marketers have turned to ambush. The mentality is, "if we can't make them watch this crap at home, then we'll bloody make sure that they simply cannot avoid our message wherever else they go."

This is why we have, unbelievably, a thing called guerrilla marketing—marketing as warfare, looking to assault the consumer on every corner.

As you spend time in the center of modern Tokyo, you inevitably reflect that it's not surprising that so many consumers are so bored of and resistant to so much marketing. They're turning off, not just because new technologies allow them to, but also because so much modern marketing is forged from such a crude and aggressive mentality.

360-degree marketing is, in essence, just a polite way of saying that you'd like to drown your consumer in your message. This kind of attack is very unlikely to elicit behavioral change.

The computer has crashed into the TV set.



TV is now dominating big urban meeting points such as Shibuya's resplendent scramble crossing.

If marketing content, such as this highly watched BBH-created commercial for Levi's, is good enough, it is sought out as entertainment by consumers.



the age of engagement

Pop into Tower Records or HMV, however, and you can find a glimpse of a far brighter future for marketing. For a few weeks earlier this year, every HMV in Tokyo was focusing its DVD merchandising on Directors Label. Featuring such names as Michel Gondry, Chris Cunningham, and Jonathan Glazer, these DVDs contain not only music videos, short films, and interviews, but also, revealingly, commercials.

Here we have a pretty remarkable situation—commercials at the top of the paid-for DVD charts. People paying to own and watch commercial messages from the likes of Levi's and PlayStation. This is nothing less than a surprising and radical case for the defense for the blockbuster commercial.

This isn't the world gone mad; this is the reality of an empowered consumer culture—or what we can call the Age of Engagement. If the communication is good enough, or engaging enough, then the consumer will listen, respond, and on some occasions even become a fan. If it's not engaging enough, then the brand doing the communicating will simply be ignored or at worst resented.

The most successful campaigns today are not the ones that are the most 360, but are the ones that engage the consumer best at the most relevant occasion. This doesn't sound like rocket science—that's because it isn't.

The obsession of modern marketers should not be, therefore, new media, or 360-degree communications. Marketing success from here on in, more than ever, will be determined simply by the quality of your marketing.

And so a look at the advanced Japanese market is really a shot in the arm for truly creative companies. Because as media mutates, evolves, and becomes more complex, the need for simple, entertaining, and above all engaging ideas becomes only more and more important.

The rules of the Age of Engagement, therefore, are really not that different from the past. If anything, they're just their logical extension. In a world over-supplied with brands and messages, it's only the truly interesting and engaging marketing that will connect with the consumer, influence their thinking and, ultimately, deliver payback. ●

Jonny Shaw is head of planning at Bartle Bogle Hegarty (Japan).

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Strong country and city brands attract investment, manufacturing, political influence, tourism and even aid. Many places spend significantly on advertising and media to enhance their potential in the world, but they can greatly benefit from marketing thinking that helps to uncover their best strengths and successfully transform their image.



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FINDINGS

the future of media

B Y N I G E L J A C K L I N

If some pundits are to be believed, in the near future we will be blessed with technologically superior media that will allow us to access the most up-to-date news wherever we are, on whichever subject we choose. Such new opportunities offered by developments in media and technology were the dominant theme when we analyzed 200 media conference and seminar topics earlier this year. This was so much so that sorting the hype from the genuine opportunities has become increasingly difficult.

We asked more than 200 senior managers and executives in business and influential occupations in 16 countries worldwide about their current and potential media consumption habits, work-life patterns, reactions to new media concepts, and which media developments had made the biggest difference to them. We also conducted 100 interviews with younger consumers to establish key differences between what we called “managers” and “future consumers.” With the help of industry experts, we analyzed these from both consumer and commercial viewpoints to reflect the importance of the media ecosystem—the inter-relationships between different formats, individual media, their contributors, and revenue streams.

A few years ago it was easy to envisage a “brave new world” in which the dominance of traditional media providers was challenged. While their power has definitely shifted, among

more senior audiences, they still retain a level of trust. Our survey showed that there has only been one real media shift in recent years: the Internet. While for younger consumers, mobiles and MP3s may well make a bigger difference, senior individuals may use these technologies but do not regard them as “ground shifting.” Our research suggests several key factors:

- ▶ The senior level individuals we interviewed lead more settled lives. They regard their mobile as “personal space” and have less need for social interaction and diversion than younger counterparts (who may still be trying to discover themselves using www.myspace.com and are more likely to “co-ordinate” social activities outside of working hours).
- ▶ There is an enthusiasm among young people to share aspects of themselves, their views, their accomplishments, even their innermost secrets. “YouTube.com and MySpace.com have become phenomena of the 21st century: Literally millions of young people are clamoring to upload their lives and share them with others,” says Ellis Cashmore, professor of culture, media, and society at Staffordshire University.
- ▶ Consumers and media owners have invested heavily in services and activities based around the PC screen. The larger screen size together with online interactivity combine to make a

powerful tool, one that smaller devices cannot match for a broad range of applications.

- ▶ While a minority of senior individuals spend much time on the road, the majority are in their offices. Out of the office, traditional media still make an attractive choice, and use of down time may be to catch up with work (rather than visiting Web sites).

The challenge in the Web 2.0 era is for online to really deliver and for traditional media owners to capitalize effectively on this. Producing a streamlined consumer experience and more cost effective advertising solution is important for online and will require:

- ▶ Better planning data and systems to allow planning and co-ordination of campaigns
- ▶ More targeted ad delivery to reduce wastage, ad budgets, and clutter
- ▶ More effective search tools and sites which remember and sense preferences.

Our research suggests we will see continued short-term growth for newspaper and trade Web sites. Given that search is the most widespread daily media activity it would be good to see a service which finds and delivers news and answers in a more efficient and relevant way specific to business users.

Mobile news alerts will be popular with some; the question is whether this niche service

points to consider

CONSTRAINTS

For the next five years, most senior managers will drive to work, spend the day at their normal place of work, then go home. This will limit their need for or appreciation of mobile-based services, especially those designed for social interaction, diversion, or entertainment.

SIGNIFICANT CHANGE

Only 13% have the combination of a laptop, broadband, and wireless at home; 41% have a work laptop; and 73% have broadband at home. As home PCs are replaced or upgraded with laptops, growth is likely to be significant. This growth will likely have a significant impact on media usage.

FACTOR TO WATCH

The online planning and delivery link: The creation of an integrated planning and ad delivery “data munge” (consolidation of various data into a single source) will result in more optimal online advertising inventory pricing and management.

how senior execs are using media, new and old

(based on a survey of 200 senior managers in 16 countries)

	% doing so within the last 7 days
▶ Used a search engine to find information on the Internet	92
▶ Saved articles from Web pages or e-mail newsletters	52
▶ Cut out and kept articles from a newspaper or magazine	41
▶ Received news information via text or e-mail on a mobile phone, PDA, or Blackberry	26
▶ Accessed the Internet at a wireless hot spot using laptop	23
▶ Looked at job advertisements in a newspaper or magazine	23
▶ Sent or received e-mails using a PDA, Blackberry, or similar device	18
▶ Posted comments on an Internet forum or similar	17
▶ Watched films/TV using a PVR, TiVo, or device which records program to watch	17
▶ Looked at job advertisements on the Web	16
▶ Accessed the Internet using a mobile phone or PDA	16
▶ Listened to the radio on a PC	16
▶ Listened to music downloaded onto an iPod or MP3 player	16
▶ Used an in-car device for satellite navigation or other purposes	12
▶ Accessed or contributed to blogs	9
▶ Watched TV on a PC	8
▶ Listened to podcasts	7
▶ Downloaded a TV program to watch from the Internet	5
▶ Watched TV on a mobile phone, PDA, or similar device	2

will be provided direct to media owners as a subscription service (rather than through agglomerators of the information).

The challenge for TV is more difficult given the various potential channels through which it can be accessed. For senior managers, mobile TV is unlikely to be a big hit. More interesting would be a news on-demand menu-driven subscription service delivered via broadband and as an audio feed. This way, users could watch what they wanted when they wanted, with some choosing to just listen and use down time mainly when traveling.

The least attractive media opportunity is likely to be the digital fold-up newspaper. A realistic estimate might be 1% daily use. Why

would a newspaper publisher want to offer this, and why would the user just access newspaper content (and not the Web as a whole).

Despite the fact that it is valued by many, consumer radio will continue to be undervalued except by the public relations community. Its lack of commercial revenue is the main problem.

Newspapers and magazines will still feature prominently in the media landscape, although the portfolios of the organizations that own them may have a wider spread of revenue streams (not just online but a greater importance for syndication). As magazine publishers become increasingly competitive, there will be a greater number of less widely read magazines but with space still there for some larger key media.

So although these senior managers may be selective media consumers who appear saturated, from a consumer point of view this simply means they have plenty of choice. As more choices and new technologies are introduced, they will become more effective at trying and rejecting them. A greater percentage of new offerings will fail, and consequently a larger number of new offerings will have to be made by individual media owners to stay ahead of the game.

The full report is available for £2,000 from www.thefutureofmedia.info.

Nigel Jacklin is managing director of Objective Research.

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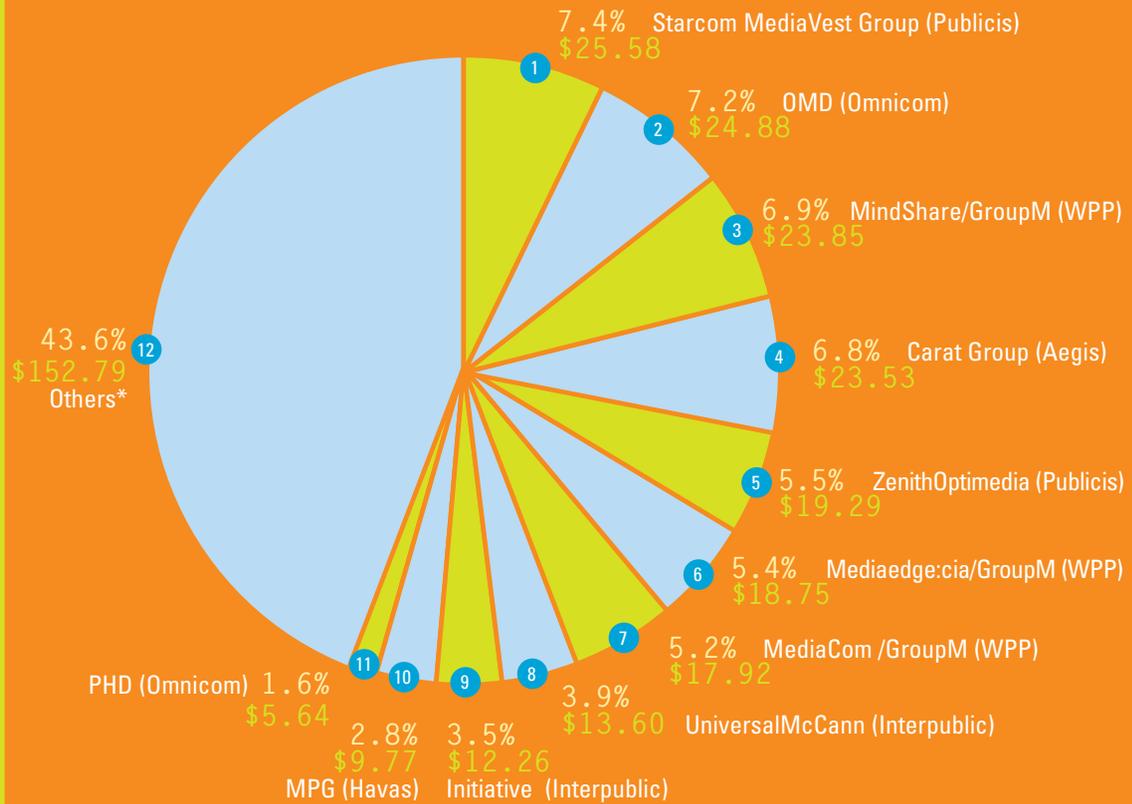
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DATA BANK

media network rankings and market share: RECMA's projections based on 2006 worldwide billings

(in billions of U.S. \$)

Total media buying and planning activity: \$347.85 billion
Total for networks: \$195.06 billion (56%)



*Those not part of networks including independent media agencies, media departments of ad agencies, and direct accounts handled in-house by advertisers.

leading communication groups

RANK 2006 VS. 2005	MARKET SHARE %	COMMUNICATIONS GROUP	ACTIVITY BILLINGS PROJECTED 2006 U.S. \$ IN BILLIONS	GROWTH RATES % 2006
1	17.5	WPP	60.51	8.9
2	12.9	Publicis	44.87	13.3
3	9.0	Omnicom	30.52	7.2
4	7.4	Interpublic	25.85	-4.7
5	6.8	Aegis	23.53	3.0
6	2.8	Havas	9.77	7.8

GroupM estimates and forecasts

media & marketing services revenue

	U.S. \$ in billions 2005	U.S. \$ in billions 2006 (forecast)	U.S. \$ in billions 2007 (forecast)
North America	263.70	276.78	289.97
Europe	202.59	210.73	218.11
Asia/Pacific	136.32	148.64	161.73
Latin America	31.34	36.89	43.29
Total	633.95	673.04	713.10

worldwide media spending

	U.S. \$ in billions 2005	U.S. \$ in billions 2006 (forecast)	U.S. \$ in billions 2007 (forecast)
North America	140.17	145.31	150.19
Asia-Pacific	97.31	105.26	112.58
Western Europe	81.41	83.94	86.93
North Asia	30.06	35.37	39.99
ASEAN	18.24	19.29	20.45
Latin America	16.18	19.67	23.86
Emerging Europe	9.29	10.89	12.35
World	346.06	367.04	388.08

worldwide marketing services revenues

	U.S. \$ in billions 2005	U.S. \$ in billions 2006 (forecast)	U.S. \$ in billions 2007 (forecast)
Direct & specialist	228.69	241.58	256.78
Sponsorship	30.50	33.79	35.99
Market research	22.55	24.08	25.34
PR	6.15	6.56	6.91
Total	287.89	306.01	325.02

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WHAT'S IN MY TRAVEL BAG?

lissa short

SENIOR VP-ADVERTISING
CFO

I enjoy exploring new parts of the world and always try to mix business with pleasure. I couldn't imagine going on a business trip in a fabulous city and not taking the time to see the sites that city has to offer. My favorite travel bag is made by Swiss Army Brands—it's big and durable and roomy enough to hold my work clothes. Plus, I can always find the extra space I need after a afternoon of shopping!



COMFY PANTS

Vineyard Vines just came out with these fantastic pants called "Lazy Pants." They are great for sleeping in or just lounging around the hotel room while I'm waiting for room service.



LAPTOP

I just bought a new laptop from Dell that is so small and light I sometimes forget I'm carrying it. I love checking my e-mail at night, quietly in my hotel room.



PHOTO OF KIDS

I always carry a photo of my two boys, Andrew and Geoffrey, and look at it often when I'm away. It makes me feel a little bit closer to home.



BOOKS

I've been a member of the same book club for 15 years. Our latest selection is "Tulip Fever" by Deborah Moggach, which takes place in Amsterdam. Reading a good book on the plane passes the time and helps me ignore the turbulence.



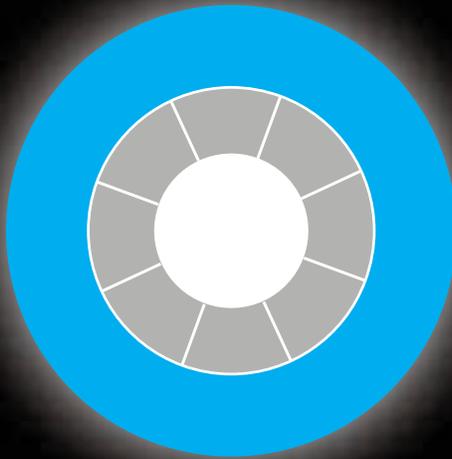
PLANNER

Coming from the print side, I'm still attached to my old-fashioned day planner that my mother gave me about 10 years ago. It has great leather patina, and I can get to my calendar and address book faster than you can say PDA.



BEAUTY PRODUCTS

Kiehl's Abyssine cream and Burt's Bees lip shimmer—you can never be too moisturized!



Slowly, a law of
the universe will revert:
demand, then supply.

Until then, watch well:
networks give people power.
Action does quicken.

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PEOPLE AND PLACES EXTRA

holiday snapshots

Whether they choose hideaways or hotspots, international players find different places to get away from it all.

Despite the increasing intrusion of mobile communications into nearly every facet of life, today's global marketers can still find moments, even weeks, to relax, far from the madding crowd.

All were diligent in checking e-mails and mobile messages when circumstances allowed. However, no phone call can compete with the tug of a tuna on the line or the acceleration on the ski slopes. In Italy, there is an ancient code of silence, *omerta*, that keeps communications at bay when they might interrupt the tempo of civilized life, as Tim Love, head of global clients at TBWA, discovered, climbing lamp posts, leaning out of balconies, and walking into fields vainly hoping for a Blackberry signal.



RACHELLE BERGES

THAILAND

For Rachele Berges, senior director for global advertising media, Motorola Inc., and her husband, the small island of Koh Racha Yai, south of Phuket in Thailand, was the place to relax. "Generally, we just sunned, swam, and ate, but we did go deep sea fishing for a full day. We caught ten tuna and a big mahi mahi and took one back for sashimi at tea-time!" she says.

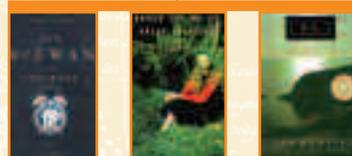


Rachele Berges and the mahi mahi she reeled in

What they read...

There is more than enough to read in the workday of a global marketer, but tired eyes can be refreshed by a good novel and more.

Rachele Berges ploughed through three books ("What a luxury!" she says): "Saturday" by Ian McEwan (fantastic), "Never Let Me Go" by Kazuo Ishiguro (tears at the end and found the central concept of cloning fascinating) and "The Sea" by John Banville (was over-reading by then and found it boring).



B Y D A V I D K I L B U R N

PEOPLE AND PLACES EXTRA
holiday snapshots

JOHN GOODMAN

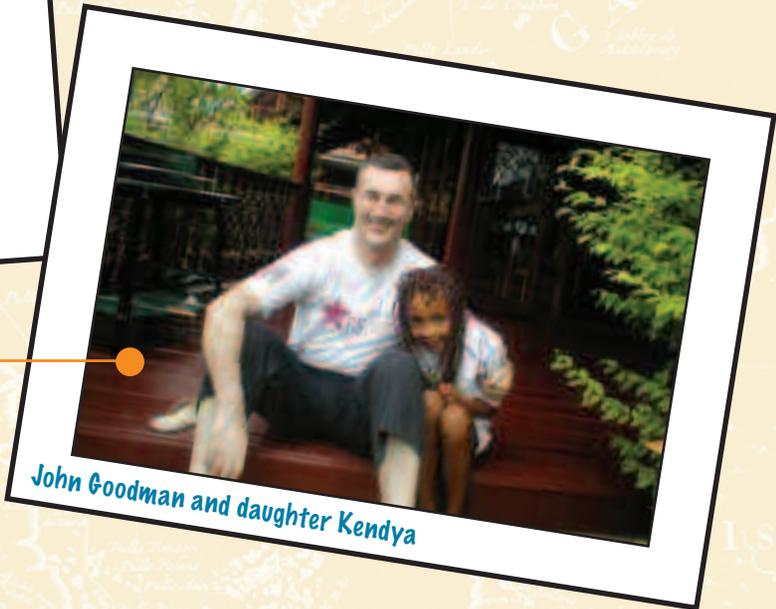
THAILAND



John Goodman's house in Koh Samui

Thailand also drew John Goodman, who recently relocated from Mumbai to become president & ceo of Ogilvy & Mather Japan. He finished searching for a new home in Tokyo just in time to join his family at their house in Koh Samui and read his way through some of the bedside pile of books from Amazon. Goodman tries to alternate such holidays with voyages to uncharted territories such as Uzbekistan, the Hunza Valley, and Oman when Kendya, his daughter, came too.

John Goodman's list included "Funny Business," a memoir by Allen Rosenshine; "Night Draws Near" (about the people of Iraq, post-occupation) by Anthony Shadid; and "Desertion," a novel by Abdulrazak Gurnah, ("which I must have bought because of a review at some point").



John Goodman and daughter Kendya

PHILIP GOODSTEIN

CAMBODIA



Philip Goodstein and his wife at Angkor Wat

Some marketers are lucky enough to live on a holiday island. That is life for Philip Goodstein, managing director of Sri Lanka's Brand Partners in Colombo. Despite the conflict in Sri Lanka's North East, the rest of the island remains idyllic. Nonetheless, the Goodsteins traveled to Cambodia to muse on the ruins of Angkor Wat.

Philip Goodstein completed Peter Carey's "Theft" and John Battelle's "The Search."



PEOPLE AND PLACES EXTRA holiday snapshots

TIM LOVE ITALY

Tim Love thanks the bartender at Harry's Bar who is the subject of one of his sketches (below).



The Old World is still a magnet. Tim Love and his wife traveled from the International Advertising Festival at Cannes to enjoy Tuscany with friends and then to Venice for their 30th wedding anniversary. Love sketched and painted watercolors while Katherine combed the alleys and exhibits. A visit to the Fenice for the last opera of the season; a Vivaldi concert in a small church; a wonderful open air long, lazy lunch on Torcello Island; and a black tie evening at Harry's Bar completed a memorable holiday.

Tim Love sketching in Venice



Tim Love's watercolors of Venice



Tim Love finished "A Great Improvisation: Franklin, France and the Birth of America," by Stacy Schiff. "I felt America had seemingly lost its equities. So, I tried to find something that would show the way from America's greatest diplomat, and first global leader, Benjamin Franklin," he said.

PEOPLE AND PLACES EXTRA
holiday snapshots

Kim Walker read a collection of award-winning New Zealand short stories.

Kim Walker enjoys the vistas of New Zealand



Kim Walker, president & ceo-Asia, M&C Saatchi, chose New Zealand to go skiing with his family. "When you're hurtling down the slopes, the mind needs to be focused on the task at hand. Can't afford to think about the office," he says.

KIM WALKER

NEW ZEALAND

STEVE WILHITE

Steve Wilhite when he is not on holiday



Steve Wilhite, newly named coo of Hyundai USA, and his wife went to their home in New Zealand to see their son and celebrate his father's 80th birthday. Skiing, paragliding, rafting, and bungee jumping filled the days. His life was in transition from his position as senior VP-global marketing of Nissan Motor Co., based in Japan. While his memories traveled with him, his photos were in transit. Wilhite spoke for all when asked for his idea of an ideal vacation: "Being with the people I love and being active outdoors." Did this holiday measure up? "Of course," said Wilhite. ●

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con·nect

v. **con·nect·ed, con·nect·ing, con·nects** • to join or fasten together. • to associate or consider as related • to join to or by means of a communications circuit

Con·nect Al·li·ance

n. an effective group of aligned, independent media representatives who offer best practices to connect media owners to increased revenues



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PEOPLE AND PLACES



HELISINGOR, DENMARK

Hamlet's castle and busy shipping lanes provided a background for the 5th Annual Connect Alliance partnership meeting. (All photo identifications from left.)

- 1 Bernard Kedzierski, K. Media.
- 2 Frederic LaHalle, Affinity Media.
- 3 Michael Karnig, Karnig4media.
- 4 Eva Favre, Affinity Prime Media.
- 5 David Oliver, Oliver Smith & Partners.
- 6 Sabine Fedrowitz, Mercury Publicity.
- 7 Jim Koene, Reed Business.
- 8 Neil Sartori, American Express Departures; Desmond Sowerby, Associated Newspapers.
- 9 Eileen Le Muet, Group Express-Expansion.
- 10 Deborah Malone, **inter national ist**; Bob Breen, Handelsblatt.
- 11 Nigel Ponder, Sky News; Declan Moore, National Geographic.
- 12 Juan Jordan de Urries Gasset, Recoletos; Margarita Fernandez, El Mundo.
- 13 Yosh Ikegami, Yomiuri Shimbun.
- 14 Dirk Van Roy, Roularta Media Group; Frank-Paul Ter Berg, Reed Business.
- 15 Hirokazu Tsuji, Isamu Namikawa, both Nihon Keizai Shimbun.
- 16 Lisbeth Olness, Dagens Naeringsliv; Simon Darragh, The Guardian.
- 17 Britta Luigs, Bauer Publishing.
- 18 Andre Friehet, Gruner & Jahr; Kathrine Ekas, Aftenposten.
- 19 Andrea Holzschneider, Spiegel.
- 20 Patrick Falconer, International Herald Tribune; Antoine Dubuquoy, Le Monde.

PEOPLE AND PLACES

COMING EVENTS

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Maria Célia Furtado;
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non-member US\$475

NOVEMBER 16
PR AWARDS

PLACE: Grand Hyatt, Hong Kong

RESERVATIONS:
852-3175 1913

PRICE: NA

NOVEMBER 23-24
WORLD ASSOCIATIONS
OF NEWSPAPERS: WORLD
EDITOR & MARKETEEER
CONFERENCE & EXPO

PLACE: Hotel Auditorium-Centro de
Congresos Principe Felipe, Madrid

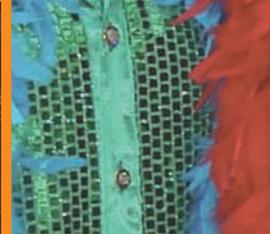
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PRICE: WAN/WEF/INMA member,
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December 4-5
WORLD MAGAZINE
MARKETPLACE

PLACE: Business Design Center,
London

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PRICE: FIPP member £440 plus VAT;
non-member £500 plus VAT



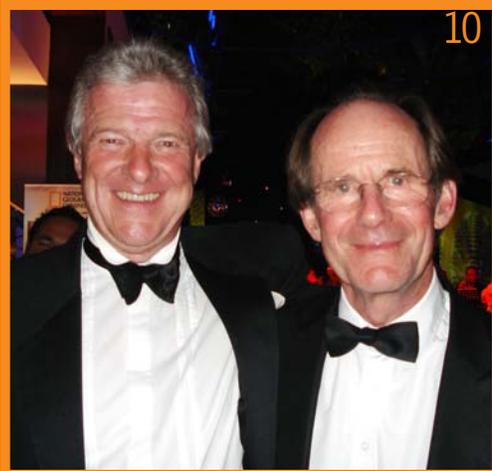
PEOPLE AND PLACES



LONDON

The U.K. chapter of the International Advertising Assn. held its annual summer ball at the Hurlingham Club with a Studio 54 theme. Money collected through a raffle of donated goods and services benefited two charities. (All photo identifications from left.)

- 1 Michael Toedman, BusinessWeek.
- 2 Kai Bald, Deutsche Bank.
- 3 Peter Stringham, HSBC.
- 4 Jonathan Howlett, BBC World; Peter Colvin, Mediaedge:cia.
- 5 Nick Edgley, Daily Telegraph; Mark Dixon, Times of London.
- 6 Germán Luis Buceta, MPG/Media Planning Group; Gerd Bielenberg, GWP.
- 7 Maria McCoy, HSBC; Oliver Eills, CFO Europe.
- 8 David Weeks, The Economist; Mark Savage, Mediaedge:cia.
- 9 Jon Housman, David Green, John Illing, all Wall Street Journal Europe.
- 10 Angus Grieve, IAA U.K., Adrian Vickers, BBDO/Abbot Mead Vickers.
- 11 Jo North, Neil Holland, both Accenture
- 12 Marina Kissam, Time Europe, Nick Gyss, ZenithOptimedia.
- 13 Carolyn Gibson, BBC World; Malcolm Hanlon, ZenithOptimedia.
- 14 Warren Burke, David Rittenhouse, both Yahoo.
- 15 Nick Mesquita, The Economist.
- 16 Will Nicholson, Euronews.
- 17 Steve Middleton, National Geographic.

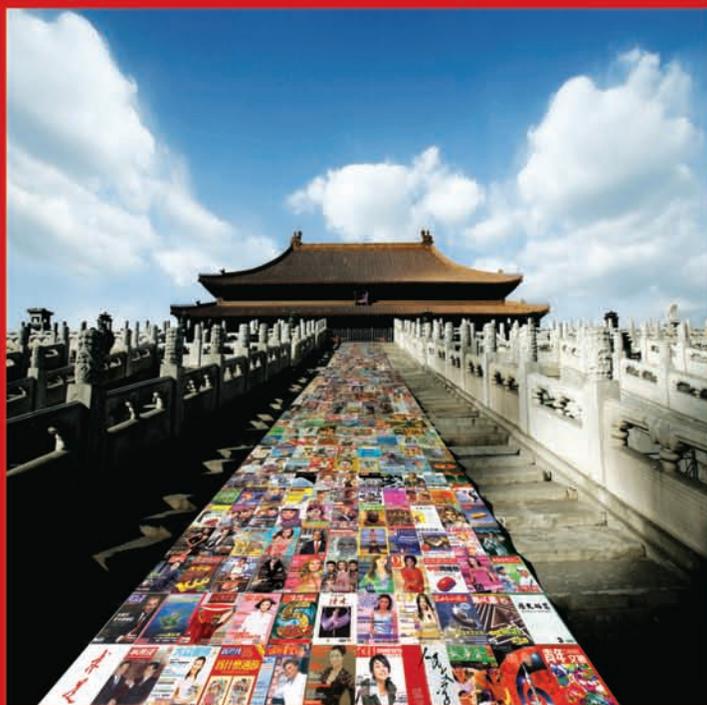




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CAREER TRACK



Michael
CARLIN

Burbank, Calif. Warner Bros. Pictures International

1995 BOSTON
WLVF-TV News

1998 NEW YORK
UniversalMcCann

Warner Bros. Pictures International

1997 NEW YORK
Ogilvy & Mather

1998 LONDON
MindShare Worldwide

2005 BURBANK
Warner Bros. Pictures International



Nick
WATERS

London MindShare EMEA CEO

1999 LONDON
Ogilvy & Mather

2006 LONDON
MindShare EMEA



Kevan
MABBUTT

Silver Spring, Maryland Discovery Networks International

1997 LONDON
Paradigm Worldwide

Vice President of Research

2003 LONDON
UKTV

2006 SILVER SPRING
Discovery Networks International



Russ
STEIN

New York BBC World

1997 NEW YORK
Bloomberg Media

Regional Director, The Americas

2005 NEW YORK
BBC World

1988 NEW YORK
American Health

1994 ELMSFORD, N.Y.
TCI Cable Advertising

2001 LONDON
Market & Research Consultant

2006 LONDON
Banner Corp.



Hanne
TOMISTO

London Banner Corp.

1998 HELSINKI
Talentum Media

Online Communications Director

2000 STAINES, U.K.
IDG Global Solutions

2006 LONDON
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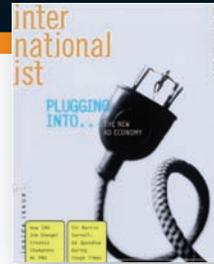
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Um, when did Bali go all private? This little gem of the Flores Sea, nestled like a serene diamond against a backdrop of distress, has always beckoned the intrepid traveler. It has been a bit bohemian, somewhat egalitarian, slightly anti-establishment. In the 60s, Bali attracted the wayward surfer. Later, legions of backpackers, fueled an economic boom in the orchid-necklace industry. In the 90s, mass tourism arrived, creating Kuta traffic jams and Australian phone card centers. Then, the bombs. Bali changed again, but not in the way you may think: Bali is now Asia's million dollar playground.

super status

Bali's new super status is such that you are not really supposed to tell anyone, lest the masses return and destroy the serenity. The bombings in 2002 and 2005 have scared many tourists, but the quality visitors have remained loyal, allowing Balinese business owners to concentrate more than ever on the upper crust of the travel world. As property ownership has privatized and more of the global jet set has bought property, the ambience has changed. Villa after villa is popping up in lush locations, with an infinity of infinity pools. The result is that the island has moved upscale quickly. Behind those gated walls and guarded villas, the global elite are out in force. Kate Moss, shipping magnates, hedge fund heroes, the Cavalli crowd, and Hong Kong tai-tais don't bother to mingle in the bars and restaurants: They simply talk to the chef, send the driver to pick you up, and serve dinner by the pool.

arrivals

There's not much to say: It's a simple affair at the one small, chic airport. It's situated 30 minutes south of Seminyak and 20 minutes away from Jimbaran Bay. Your driver should pick you up and be ready for you at all times. This is the important thing to know. A driver here is not expensive and will save you all sorts of hassle. For a budget driver, try Ketut Wei, toet_wei@yahoo.com (62-813-3721-0853), a former surfer with

good knowledge of Bukit, the cool spots on the south of the island.

where to stay

It's worth picking up a copy of *Luxe Bali*, a pocket-size guide with everything you need to know, and available at www.luxeguides.com. If you must stay at a hotel, let it be the Amankila, a tranquil slice of heaven exported to earth or try the Legian, located in Seminyak. It may be a little too close to Kuta for comfort. The Kuta beach area is an aesthetic, moral, and social eyesore, so don't feel guilty about missing it. Concentrate on Seminyak or better yet, isolate yourself on the Bukit, where Bali is at its best. Private villas are the way to go. Many of the best can be booked through www.elitehavens.com, the island's best resource for villas.

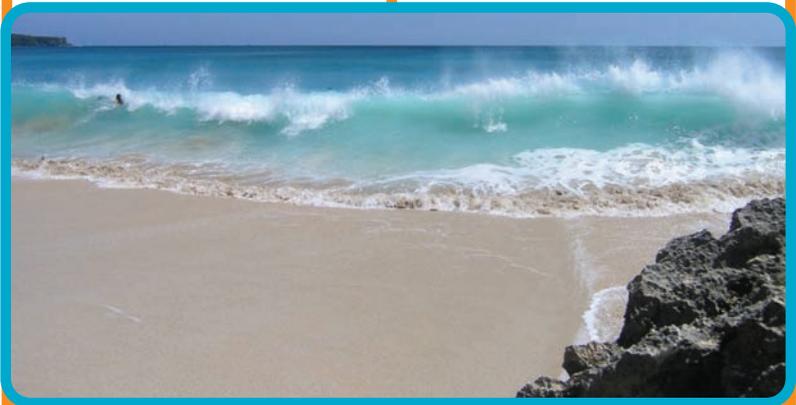
- ▶ Mary Justice has just about the only villa on the beach in Seminyak, an excellent location with a cute space. It's not always available but worth it if you can get it. E-mail her directly at mjpr@netvigator.com.
- ▶ Villa Istana and Villa Permutih are both stunning and feature amazing amenities and stunning views, with cliff-top views and excellent staff. (www.theistana.com and www.villapemutih.com).

where to eat

There are many places, but lots of people just order in or have the villa

staff prepare meals. Order in the morning, and your heart's delight awaits you in the evening. If that's not your style, a few old favorites remain the best. Café Warisan offers the best French food on the island in a

dipping your toe in the water, a few beaches are a must. Take a sunset run down Seminyak, stopping for a cocktail after you finish at Ku de Ta, a nice spot for a bit of people watching. While everyone else is all dressed up and posing with a martini, you can slug some watermelon juice and feel like a rebel. Down on the Bukit, Dreamlands beach summons the beautiful people and the in-the-know sunbather. The rock bar at the far end of Dreamlands prepares decent food, and a bottle of wine at sunset here will keep you in smiles for a week.



Dreamlands beach attracts the beautiful people.

beautiful setting. Where else can you sit next to a rice paddy while you dine? There are numerous little restaurants at Jimbaran beach that offer the most amazing seafood, all nestled into the sand and flickering in the evening candlelight. The food is typical beach fare, but nothing beats sand in your toes and a grilled snapper.

La Lucciola offers a stunning setting with stunning prices to match right on the beach. Other options include Waroeng Tugu for Indonesian food and Khaima, great if you want to lie around and really feel out of it.

the vibe

Bali, at the end of day, is still a surfer's haven, and even if you're just

Around the corner is the arrival of jet set Bali at another level, three locations that everyone is talking about. First, the much anticipated Bvlgari Resort just opened on the east side of the Bukit. Second, the Legian is preparing a private beach house which will be ideal for weddings and honeymoons. And finally, Canggu Club will offer gym facilities, swimming, and spa at the best location in Indonesia.

Today's Bali is not the island of even a few years ago, and it seems soon only the super-rich will be able to afford it. But if you go now, bring your blingiest flip-flops, and forget about the nightlife, you'll have the best time ever, even if it is just three friends, your driver, and your chef. •

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Cameraman: Vaughan Smith, Serbia, 05.03.98
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Report successfully filed 20:49 GMT.

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