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internationalist

FOR ADVERTISING, MARKETING + MEDIA PROFESSIONALS

VOLUME
2009 **2**



1000

TODAY'S smart marketers

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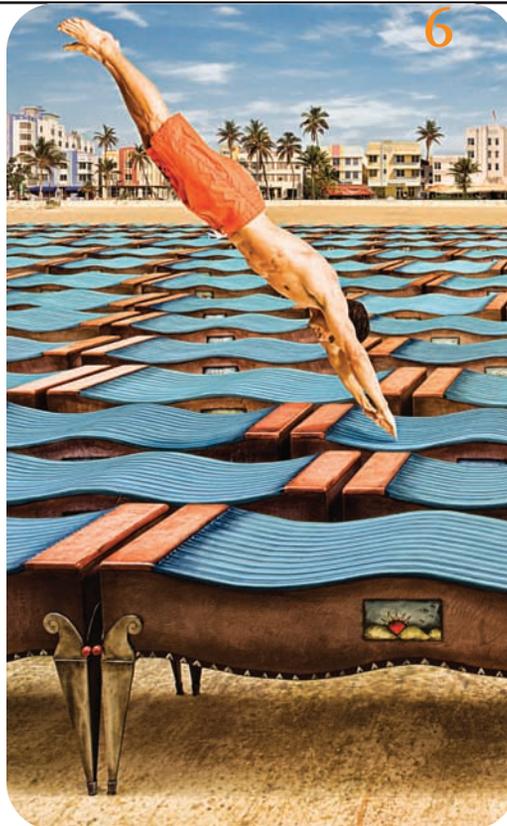
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STAFF

deborah malone FOUNDER & PUBLISHER 1.917.816.6416, deborah.malone@internationalistmagazine.com
amanda baltazar NEWS EDITOR amanda@internationalistmagazine.com
juliana koranteng FEATURES EDITOR juliana@internationalistmagazine.com
david kilburn ASIA EDITOR david.kilburn@internationalistmagazine.com
les margulis CONTRIBUTING EDITOR les.margulis@internationalistmagazine.com
allyson stewart-allen CONTRIBUTING EDITOR allyson@intermarketingonline.com
peggy bloomer DESIGN DIRECTOR 1.860.669.5070 peggy.bloomer@internationalistmagazine.com
patti brown WEBMASTER webmaster@internationalistmagazine.com
Maja Leibovitz EVENT & SPONSORSHIP MANAGER maja@internationalistmagazine.com
corporate office 1.212.371.7026

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Continual Transformation



This month marks several new beginnings and a period of increased growth for **The Internationalist**.

Our “Internationalist 100” issue highlights those hard-to-track, cross-border marketers by piecing together nuggets of data from around the globe. These contemporary pioneers of the international

marketing world are often the less-large companies or fledgling divisions that need to reach new markets, but without the advantage of worldwide infrastructure or immediate local knowledge. They have little choice but to become instant experts in culture, language, customs, legalities, and local media.

The announcement of our partnership with 90-year old leader SRDS and its International Media Guide brings a new set of exciting solutions. IMG offers data, print resources and online search tools for international media planning needs. The International Media Guide is a terrific time-saving tool in a world where the need for instant international information grows daily. Plus, IMG has been a proven lead generator for media owners.

We’re also set to launch **The Internationalist Press**, our new on-demand book publishing company. Many contributors to **The Internationalist** have ideas to share that require more than a few pages in a magazine. We’ll offer internationally-minded industry leaders and marketing professionals an opportunity to present new concepts, emerging trends and best practices in book form with quick turnaround from concept to publication.

Despite the times, this 7th year in our development has truly been a year of firsts. We introduced our Awards for Innovation in Media with wonderful success, and now our Awards for Innovative

Digital Marketing Solutions are underway with the help of HP’s Scott Berg as Jury Chair and terrific judges like Rishad Tobaccowala, Rob Norman, Mike Jarvis and Graeme Hutton. These simple-to-enter, straightforward award programs are not about ceremonies, but are designed instead to highlight great marketing solutions by showcasing them throughout the world online, in print and in universities. (www.internationalist-awards.com)

Earlier in the year we created the first online calendar of advertising events around the world in an effort to aggregate advertising festivals, award entry deadlines, marketing events, trade shows, as well as national holidays and key political, entertainment and sports events in the top markets. (www.internationalistevents.com)

Our ongoing series of think-tanks for marketers, **MEDIA MATTERS** and **MARKETING MATTERS**, are continually met with kudos. These informal events gather together key thinkers on international issues to challenge them to discuss today’s opportunities in a fast-paced forum of debate and interaction.

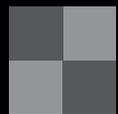
The goal of The Internationalist has always been to serve this industry by connecting the people and ideas in international marketing. Today The Internationalist encompasses many projects — large and small — to offer forums for discussion, solutions and action. We may have started with just a magazine in mind, but we now fulfill our mission IN PRINT, ONLINE, IN PERSON and through BEST PRACTICES.

And we’ll keep the innovation going. Today, it is expected of any organization with a promise to connect people and ideas. We have all learned that to thrive in our industry — regardless of the economic conditions — means continual — and meaningful— transformation.

Deborah Malone, *publisher*

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GAMES

Is it Art or is it Advertising?

The Red Ball Bounces Around the World. Andy Warhol's famous images of Campbell's Soup Cans may have had us wondering about the commercialization of art several decades ago; now we'll let you be the judge of some provocative installations from around the world....

A very large and hard-to-miss red ball certainly attracted attention and curiosity in Toronto this month, particularly in that it moved to various locations in the city over a 10-day period. In fact, the inflatable red ball has traveled the globe and has been a temporary part of the urban landscape in Barcelona, Sydney and Chicago-- where it has been wedged, squeezed and stuffed into public spaces.



The RedBall project was created by New York artist Kurt Perschke as part of the Luminato arts festival. However, each city reacts differently to the bouncy, inflatable orb. Torontonians assumed it was advertising. In Barcelona, the ball was viewed with intellectual detachment, and in Sydney, people bounced off it.

According to Perschke, the ball transforms each city. "The effect is like the red balloon in the classic French children's film: A round plaything enters our lives, with a strange will of its own."

Buitoni Creates a Masterpiece. Unlike Moscow's metro system where extraordinary art and architecture is a mainstay, the walls of New York's subways are more graffiti-clad than classical. However, Fourteenth Street's Union Square Station has now been transformed by Nestlé pasta brand, Buitoni, to a gallery featuring "culinary works of art." Called "Create a Masterpiece for Dinner," the fun campaign opened this month with docents welcoming commuters to the Buitoni Union Square Station Gallery to showcase "The Italian Art of Food."



New Yorkers are reacting to the campaign with smiles, and favorable tweets and blog mentions like "the creatives behind this one deserve a big pat on the back" and "adds a little class to the Union Square subway stop." Many New Yorkers break their usual fast pace to view the "art" and read the tongue-in-cheek title cards about Artist Buitoni which accompany each framed work.

Miami Asks You to Express Yourself.

Miami has long been a destination for both business and pleasure; however, the Convention and Visitors Bureau is moving in a new a direction with a marketing campaign to attract those interested in the city's art and design. Called "Express Yourself," Miami is being portrayed as more than a place of beautiful skylines and supermodels, but as a fashion-forward and inspirational creative center.

The CVB believes that Miami is a muse for many artists and designers, and marketing the art with the destination was a natural element when attracting visitors from around the world. In fact, half of all the air travelers to Miami are from international locations, according to the CVB; travelers from Canada, Brazil and Germany are among top visitors. The campaign is created by local artists whose work has been influenced by the city.

"A LONG TIME AGO, I IMMERSED MYSELF IN MIAMI. I HAVE YET TO COME UP FOR AIR."
-Amor Zabari, Furniture Designer

Come forth, inspiration seeker, to thrill the body and mind. Immerse yourself in sun, sand, and nature, and you'll float in bliss. Plunge beneath the surface, where hidden cultural treasures indulge your passions. Degrade deeply into your own imagination, and let your boldest desires come to the surface.

Express yourself in Miami with inspiring deals at MiamiExpress.com. For a free vacation planner, call 888.76.MIAMI.

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 EXPRESS YOURSELF

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The Internationalist partners with SRDS



The Internationalist is pleased to announce a new partnership with SRDS and its International Media Guide (IMG). IMG is the world's only source for comprehensive data and contact information for all print media (newspapers, magazines, business-to-business publications) in every country. Available as both annual directories and as an online resource and search tool, IMG is a critical product for international media planning needs.

SRDS (Standard Rate & Data Service) has been the leading provider of media rates and data for more than 90 years in the United States. Used by 95% of U.S. ad agencies, the SRDS database is the largest and most comprehensive in the world, cataloging more than 100,000 media properties. It connects buyers and sellers with media data on magazines, newspapers, television, radio, direct marketing, online and out-of-home. SRDS Media Solutions® provides advanced functionality and value-added services for extensive planning and buying needs.

According to George Carens, President of SRDS, "We see this partnership as a natural fit. **The Internationalist** provides exactly what our international service requires — greater access to marketers and agencies who need time-saving tools for media planning, as well as entrée to key media owners around the world."

Deborah Malone, Founder of **The Internationalist**, says, "We are committed to providing the international community with ideas, tools and best practices. IMG, particularly with its 24/7 online access, provides a valuable service in a world where the need for instant international information is increasing. Plus, IMG has been a proven lead generator for media owners. This represents a terrific opportunity for these times."

Joint opportunities between SRDS and **The Internationalist** will be created in order to capitalize on the strengths of both organizations. A combination of products will be offered to better serve the international community with media resources designed to provide immediate access, usefulness and results.

SRDS is part of Kantar Media, one of the world's largest market research and media intelligence organizations. It operates in 80 countries through some 20 specialist companies, and its custom and syndicated research services are used by a majority of the Fortune 500 companies. In late 2008, TNS (formerly Taylor Nelson Sofres) also became part of Kantar's operations.

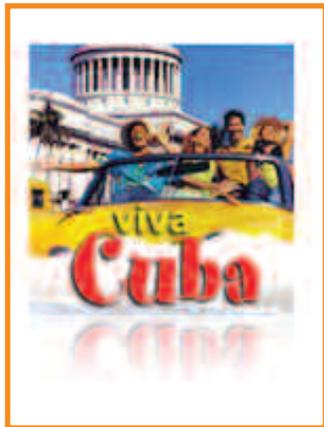
IAA-Denstu Global Student Poster Winner



The International Advertising Association (IAA) and Dentsu with support from the United Nations announced the winner of the IAA-Dentsu Global Student Poster Competition. This year's theme was climate change. Entries raised the awareness of the impact of climate change.

A total of 145 entries were received from thirteen countries, including India. The winning entry, 'Thermometer', was submitted by Matias Fernandez Garcia from Universidad Argentina de la Empresa in Buenos Aires.

Cuba Launches First Pan-Regional TV Campaign



"Viva Cuba" is the refrain you'll hear from an exclusive campaign on Euronews to attract European travelers to the island nation. The Cuban Tourist Board's first pan-regional television foray highlights endless summer with sponsorship of both the World and European weather forecasts with 20" and 30" spots that suggest sun, sea and magic. A series of profiles will appear during the rest of 2009 which promote the various festivals and events throughout the island, along with world class resorts.

"Viva Cuba," of course, means "Long Live Cuba," and few countries bring as many powerful brand associations with cigars, rum, music, politics and escape to a tropical island preserved in a bygone era. It will be interesting to see if a possible U.S. post-embargo future would expand the campaign a neighbor 90 miles to the north.

Innovative Business Models Awarded

Who says newspapers aren't thinking creatively? At the May INMA (International News Media Marketing Association) World Congress in Miami, which attracted newspaper publishers and marketers from every corner of the globe, all conversations were about the future of the medium and new models for innovation. A highlight of the event was the Innovative Business Models Contest, an international case study competition designed to showcase how media companies are extending their brands to fill a new market space, attract new audiences, or generate new revenue streams. The project was collaboratively developed by **INMA**, **Publicitas**, the international advertising sales representation giant, and its Swiss parent, **PUBLIGroupe**.

Norway's *Verdens Gang* won the contest's top prize for the new internet service concept, **Pengenedine.no** ("your money"). The web site provides customers with quick, safe, and convenient access to the best interest rates on liquid funds. By using the service, customers receive deposit offers within two hours from financial institutions competing for their money. The web site receives a commission from partnering banks on those offers accepted by users.

Second place in the Innovative Business Models Contest went to The Toronto Star for Wonderlist.ca, an e-mail marketing program that awards prizes to participants in exchange for their commitment to receiving deals and offers from advertising partners. Advertising partners pay for the privilege of speaking to Wonderlist participants, creating a new revenue stream for the Star.

For more details, go to:
<http://www.howdoyouextendyourmediabrand.com>

WELT International to debut with a New World View

German media giant, Axel Springer, has been doing well. At a time when the mere mention of the word “newspaper” can bring to mind the print closures in the United States, DIE WELT, Axel Springer’s flagship daily, is bucking the trend. Germany, though, has consistently been a strong print market where daily consumption of multiple newspapers and magazines is high.

In an unprecedented move, 60-year old DIE WELT (The World), one of Europe’s leading quality newspapers with 450 journalists around the globe, will launch WELT International, a new weekly English-language “global media for global players” in February 2010. Its editorial mission is to present “the world — from a European perspective.”

At the core of WELT International is a belief that the world is missing intelligent international news, commentary and analysis from the heart of Europe. Much of today’s global reporting is seen through an American or British lens. WELT International promises a fresh perspective from Continental Europe, portrayed with “realistic complexity” through print, online and mobile products. The editorial management team at WELT International is comprised of Thomas Schmid, Editor-in-Chief of WELT Group, Christoph Keese, Editor WELT International, and Andrew Gowers, Editorial Consultant who was both founding Editor-in-Chief of the Financial Times Deutschland (1999-2001) and then Editor-in-Chief of the FT (2001-2005).

WELT International is also planning to launch in February to a controlled-circulation audience of just over 1 million “elite” readers through three platforms-- (350,000 per week via the newspaper; 400,000 visitors per week online, and 350,000 per week via a mobile newsletter). Calling the program a “unique global targeting model,” WELT International is willing to demonstrate that high-quality controlled circulation is more receptive to media efficiency and advertiser needs. They site the budgetary constraints of the times as limiting corporate media subscriptions, while also dictating that advertisers accept as little wasted coverage as possible.

Their target audience of “influencers” will be comprised of senior business executives (63%), politicians and government officials (25%) and academics, think tanks and journalists (10%). The projected global mix of readers will be roughly 47% Europe, 43% US, and 10% Asia. It is now estimated that 47% of the initial circulation will be mailed individually, while 45% will be distributed through First and Business Class sections of international flights on select airlines and through luxury hotels.

WELT 
International

Axel Springer CEO Dr. Mathias Döpfner states the following as the company’s move forward: “Our strategy: Strengthening of the leading market position in German-language core business, internationalization and digitization.” Axel Springer is Germany’s largest newspaper and third-largest magazine publisher as well as one of the leading European media enterprises. With over 170 newspapers and magazines, more than 60 online offerings for various different interest groups and information needs, as well as its holdings in television and radio stations, Axel Springer is active in a total of 35 countries.

Introductory advertising rates have been established. For more information, contact: daniel.biene@axelspringer.de



beyond the downturn: publicis study unveils the power of good life

- » **62% of Hong Kong interviewees are confident that they will either maintain or improve their financial stability in '09 vs. '08**
- » **34% of Hong Kong interviewees are confident in the government's ability to fare financially the same or better in '09 vs. '08**

A multi-city study by Publicis, one of the largest global marketing communications companies, reveals that although consumers across Greater China are searching for more value in reaction to the global financial crisis, 70% of those surveyed refuse to move to cheaper brands.

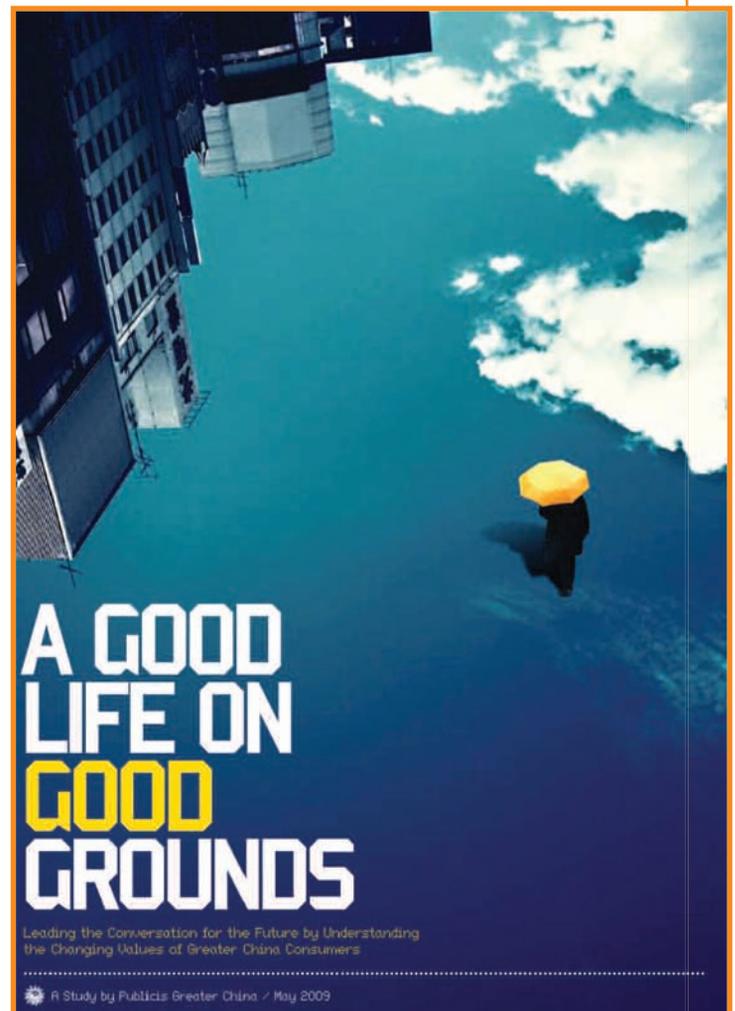
According to the study, only between 5% and 10% of Greater China respondents intend to cut stays at 4 to 5 star hotels, dining at formal restaurants and purchases of high-end clothing and accessories over the next 12 months. Instead, people intend to cut back on the basics, with 20-25% saying they will do without regular discretionary day-to-day purchases like informal eating out, in-home entertainment, and personal care items.

“The most prominent finding that emerged in all markets is the intense desire to keep up with the Good Life — now and in the future — and not to cut back on favourite brands,” commented Laurie Kwong, CEO, Publicis Greater China. “Brand loyalty is more than a financial decision. Consumers in Greater China are not eager to define for themselves a ‘cheaper me’.”

Conducted in Mainland China, Taiwan and Hong Kong between December 2008 and March 2009 with a sample size of more than 1,500 consumers, the study looks into how consumers react to the current economic challenge as well as the long-term ramifications. The broad based study has tracked in depth information in relation to over 20 product categories ranging from luxury to day-to-day discretionary, beauty to consumer electronics, in-home entertainment to travel, and more.

Clearly, not all consumers are behaving alike. Analysis of survey data further identifies four shopper types across Greater China for each of the 20 categories covered.

Laurie Kwong, CEO-Publicis Greater China
laurie.kwong@publicis-asia.com



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 Independently run companies

12
 YEARS

IN THE MAKING

The B.E. International independent group of companies was established in 1997 as an answer to the challenges facing agencies and clients looking to expand on a global level. It has grown steadily into a business conglomerate comprised of 12 independently owned strategic companies with 38 partners and affiliates in over 100 markets around the globe. With unmatched expertise on every front of the media business, BEI is deservedly touted today as Global Communication Architects.

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(3,716 respondents)

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Data source: "Newspaper Readers Basic Survey 2007"
conducted by Central Research Services, Inc.
(4,897 respondents)

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GLOBETROTTERS

from the blackberry of deborah malone



This GLOBETROTTERS column is designed to keep the international community connected. Not only will it spotlight who is where in the world now, it will also describe the adventures we all experience by living a life of constant worldwide travel. If you've ever been hijacked, stuck in a revolution or committed an unforgettable cultural faux pas, everyone in our community will be curious to hear about it. Please do tell us, and don't forget the photos!

TO SUBMIT TO GLOBETROTTERS, EMAIL: deborah.malone@internationalistmagazine.com



BRAZILIAN INDUSTRY NOW WANTS TO "DO A NAKED"

► No, it's not about wearing nothing on Copacabana Beach. (Next to nothing is de rigueur already.) Apparently, "Do a Naked" is now a generic term in Brazil (in English, not Portuguese) to describe a new way of thinking about marketing, as espoused by Naked Communications, the revolutionary integrated marketing communications experts.

Brazil seems to just love Naked (the company) and has asked key staffers to speak at just about every major conference about their "naked truths." Naked Communications is a marketing consulting leader is helping to catalyze and direct change without overhauling a client's

existing agency structure. Their focus is on neutrality, objectivity and collaboration in order to maximize the resources of all agencies involved.

Now, Brazilian marketers want to apply this kind of thinking to their agency management. Naked has been overwhelmed with clients who'd like the company's services in Brazil, as well with approaches for joint ventures and start ups. Could an office be far away? Naked already operates in New York, London, Amsterdam, Paris, Oslo, Copenhagen, Stockholm, Tokyo, Sydney, Melbourne and New Zealand.) It certainly sounds like they need to add a few more warm climates to their geography. The only question is will they opt to be Paolista or Carioca? (We think the answer's obvious.)

CONTACT: john@nakedcomms.com

ADVANCE MEDIA INTRODUCES EUROPE TV

► Advance Media, the young rep firm headed by the energetic Peter Mason, hosted the launch of Europe TV at London's Soho House. A new option in pan-regional television, Europe TV offers the aggregation of 4 top national channels — DW World (Germany), RAI (Italy) TV5 Monde (France), and TVE (Spain). It is estimated that 25% of European business decision-makers do not understand English well-enough to watch English-language programming, so the combination of these local-language networks will also seek to capitalize on reaching this missing audience.

Originally a radio broadcaster, DW (Deutsche Welle) has recently entered the TV space with news and quality programming, and is one of the only local networks to alternate between German and English.

TV5 Monde, is a well-recognized French brand with 12 international feeds across Europe, the Middle East and Africa. TVE, Spain's largest network, is well known for big budget productions,



soap operas and sports; it reaches 400 million Spanish speakers Europe and Latin America.

RAI is synonymous with Italy — wherever one may be in the world. RAI.TV was recently launched for on-demand programming.

Also participating in the day was DW's **Rolf Nolting**, RAI's **Riccardo Carbonelli**, TV5 Monde's **Delphine Kahn**, and TVE's **Nahim Mehenni**.

CONTACT: peter@advance.uk.com

BURDA SHOWS DEDICATION TO GLOBAL GROWTH

► Munich-based Burda, a century-old, family-owned media company and publishers of such well-know German titles as Focus, Chip, Burda Moden, and Bunte have decided that this is precisely the right time to open wholly-owned local ad sales offices in a number of cities, including Paris, New York and Zurich. (Previously, the company used independent reps in each of these markets.) The media giant publishes 260 periodicals — 74 are published in Germany and 186 are published abroad.

Sal Zammuto, who had spent a long career at independent representation companies like Globe Media and Publicitas has taken on the role as International Ad Director for Burda in North America (U.S., Canada and Mexico) with offices in both New York and Atlanta.

CONTACT: salvatore.zammuto@burda.com



if he had the choice between a government without newspapers, or newspapers without a government, he would not hesitate to choose the latter.

Clearly, Thomas Jefferson never had cable news to contend with — (laughter) — but his central point remains: A government without newspapers, a government without a tough and vibrant media of all sorts, is not an option for the United States of America.”

President Obama was followed by comedienne Wanda Sykes who offered her views of the political climate in Washington. (Some would call it funny; other felt it was a bit stormy.) Next year's dinner is slated for May Day. We'll see who Rhona and Mark get photographed with then.

THE YOMIURI WELCOMES SUZUKI

► The April Japanese fiscal year often initiates change in international departments, and the Yomiuri Shimbun introduced **Keita Suzuki** to New York as Advertising Sales Director for the Americas. **Kaz Kuniya**, his predecessor, returned to Tokyo after nearly three years in the Big Apple to a new role of managing the international department and also overseeing foreign ad placements. Both enjoyed a week's overlap, so they were snapped here just before enjoying a sushi lunch in Midtown Manhattan.

CONTACT KEITA IN NEW YORK: SUZU6007@YOMIURI.COM

CONTACT KAZ IN TOKYO: KAZU2024@YOMIURI.COM



MEDIA, CELEBRITIES AND POLITICOS MIX AT THE WHITE HOUSE

► **Rhona Murphy** of Newsweek and **Mark Ingall** of Citibank managed to be part of one of the more coveted guest lists this May — the Annual White Correspondents' Association Dinner. (The WHCA represents the



White House press corps in its dealings with the administration on coverage-related issues.) The Annual soiree was originally created to raise money for scholarships and honor recipients of journalism awards; however, it has also become an evening where Sting, Bono and Tom Cruise rub shoulders with the Obamas and CNN journalists or Saturday Night Live comedians. In this case, Rhona and Mark were snapped with retired General and former Secretary of State, Colin Powell.

An event tradition is for the President to make humorous remarks about members of his administration. This year, President Obama also joked about his first 100 days in office. One of his quips delighted the New Yorkers in the room: *"In the next hundred days, I will meet with a leader who rules over millions with an iron fist, who owns the airwaves and uses his power to crush all who would challenge his authority at the ballot box. It's good to see you, Mayor Bloomberg."*

He also said, to the applause of all in the room, *"... your ultimate success as an industry is essential to the success of our democracy. It's what makes this thing work. You know, Thomas Jefferson once said that*



HARRISON RAND BLASTS OFF

► During these times, one hears less about the launch of new businesses; however, it is precisely the right time for good ideas to take wing. A new agency opened its doors this spring, called Harrison Rand — a name that reflects three generations of a family involved in the business of media and marketing for more than 6 decades.

Brothers **Jason Harrison**

Rand and **David Schuyler Rand** opened their own shop in New Jersey with "old school values and new school smarts," and are already working with clients in the beauty, entertainment, spirits and real estate categories. Many in the industry know **Daryl Rand**, the mother of these young men, from her role at CBS Outdoor and her long-time involvement with the IAA.

A brief history was told at their agency launch party, "In 1934, it took 2 buses, a trolley and a ferry to get to NYU to study advertising from West New York. After graduation, Harold L. Harrison started his agency from the back of a family grocery store, and in 1987, he was inducted into the New Jersey Advertising Hall of Fame."

His grandsons believe that advertising is in their blood. As they say, "Three generations, two brothers, one new agency." We wish them 100% success.

[HTTP://WWW.HARRISONRAND.COM/](http://www.harrisonrand.com/)

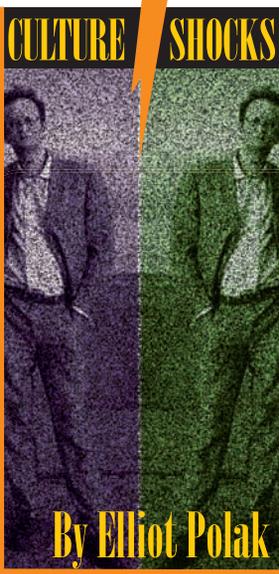
Where Are They Now?



I recently attended a number of events for the digital industry, which is now home to many people we all know from the world of international media and marketing.

All photo identifications from left:

- 1 **David Taggart** after a career in publishing at Editorial Televisa and America Economía is now in entertainment — licensing characters in films and working with his own photography; **Harry Neuhaus** — formerly of CNN & MTV has moved from Miami to New York and working at LATV; **Les Margulis** — known largely for his years at BBDO is now off to Mumbai to run R.K. Swamy Media Group.
- 2 **Randy Kilgore** is now Chief Revenue Officer at Tremor Media, an online video advertising network; he had spent 16 years at Dow Jones.
- 3 **Dave Dickman** was well-known in the international community during his years at Turner in Hong Kong. He's now at Yahoo in the U.S. as Head of West Coast Sales.
- 4 **Gavin Bishop** is now in New York as head of Publisher Solutions at Google. He had been with the FT in both Asia and the U.S. and had attended University in Cape Town.
- 5 **Barry Frey** is making headlines as Senior Vice President at Cablevision after a long career with international responsibility for TV networks like USA and Hallmark. **Michael Ginn**, after a long career at CNN, is now at Media Link, the strategic media consulting firm that incubates emerging companies in the media and advertising space.
- 6 Everyone knows **Liz Sarachek** — from her entry in the business at the Economist in 1993 to Time to Dow Jones to Star Media. Now, **Liz Sarchek-Blacker** is living in Washington D.C. and SVP-Digital for ImpreMedia, the Hispanic news and information company with Spanish-language newspapers in 17 U.S. markets.



Vignettes from around the globe that illustrate how being culturally aware can make a world of marketing difference.

People are different, cultures are different. What works in Liverpool may be a disaster in Lisbon. Multiply this by 253 cultures and 151 markets. In today's instant and borderless digital world, the risk for brand owners has never been higher.

China protests Mao sperm ad. Doc Morris Pharmacies has officially apologized to the Chinese government for an ad representing Mao as a sperm cell. The tagline, "Don't bring the next Mao into the world. Use a condom," created an outcry in China even though the campaign only appeared in Germany. It did not escape the attention of Chinese bloggers or the Communist Party's Peoples Daily.

Two other ads in the series represented Hitler and Osama Bin Laden as human spermatozoids to promote the use of condoms. Last year following similar protests, car-maker Citroen apologized to China for a Spanish campaign portraying Mao.

Provocation may be a good tactic to gain attention well beyond one's initial media budget; however, provocation in one country (Germany), may simply be perceived as an insult in another (China). Making fun of officials who represent the nation as a whole is simply not understood in China — regardless of an official's legacy.

There's no question that the Chinese government is asserting itself in demanding that foreigners respect China. For brands looking to succeed in the world's biggest growth market, use of Chinese symbols and imagery should be checked rigorously and systematically.

Burger King upsets Mexico. The ambassador of Mexico in Spain issued a formal protest to Burger King after the airing of a TV commercial in Spain.

He said that the commercial: "improperly used the stereotypical image of Mexicans" to promote the Texican, a flame-grilled Whopper topped with taco-coated chili con carne and spicy jalapenos.

The Texican is described in the

commercial as "the taste of Texas with a little spicy Mexican". The spot shows a tall Texan cowboy living with a short Mexican wrestler. While the print ad version depicts the short wrestler as wearing the Mexican flag as a cloak.

Disrespect to the Mexican flag is considered an offense in Mexico. Ambassador Jorge Zermeno asked Burger King to pull the ad and apologize for offending Mexican cuisine.

Although often distasteful, stereotyping of nationalities is nothing new in advertising and can be used to good commercial effect as "shorthand".

In the case of "reverse import" business however, stereotyping must be systematically avoided, as it almost guarantees outrage, failure and ridicule.

Reverse import is the export from a country of origin and import back of a foreign adapted version. For instance:

- **TexMex in Mexico (or by extension, Latino-friendly Spain)**
- **An American Pizza chain in Italy**
- **A California Sushi concept in Japan**
- **An Arabic designed Chinese food chain in China**

Reverse import can be surprisingly successful. By showing an appreciation of the culture to which a brand is marketing back to, it subtly flatters the local audience ("we are so good, the Americans / Arabs / British have imitated us!").

Angelina Jolie shoots and kisses her way out of Britain. An ad for the film "Wanted" showing an "almost naked" actress Angelina Jolie in the act of shooting and kissing has been banned in the UK by the official British advertising watchdog (ASA).

According to the ruling, "The ad (...) depicted several guns being fired by both the male and female leads.

In conjunction with the on-screen text and voice-over that stated 'Angelina is blazingly sexy' and 'The coolest movie of the year,' the overall impression was that using guns was sexy and glamorous. We concluded the ad could be seen to condone violence by glorifying or glamorising the use of guns. On this point the ad breached CAP (Broadcast) TV Advertising Standards Code rules 6.2 (Violence and cruelty) and 7.4.1 (Mental harm)." For the full ASA's ruling: <http://tinyurl.com/c4ek35>

Although gun crime is much lower in Britain in the United States, sensitivity to an alluring portrayal of violence, particularly when targeting youth, is high. This may be due in part to the very recent emergence teenage knife and gun crime.

Tom Cruise speaks in Spanish to a Brazilian Crowd. Tom Cruise was recently in Rio de Janeiro, Brazil to promote his film Valkyrie. He spoke to the audience with a few words in Spanish, saying "hola" and "gracias" in an attempt to endear himself to the local population. However, he only displayed his ignorance, unaware that in Brazil the population is Portuguese speaking.

This is an obvious case of regional variation — a completely different language is spoken in Brazil vs. the rest of South America with which it shares borders. But many people are not aware that there are differences in the Spanish spoken between countries in much of Latin America, both in terms of grammar and vocabulary.

The same is true in the Middle East region, where again, we often see a broad clustering of nations with little note of variances in dialect and culture for example between the Gulf states, Egypt, and Lebanon.

Elliot Polak, a dual American – French national, is the Founder & CEO of Textappeal and a recognized authority on cross cultural marketing. His company helps some of the world's leading global brands cross borders successfully. Born in New York, he is the product of a highly diverse background which includes Dutch, Belgian, Irish, Danish and Norwegian influences, and from an early age was exposed to competing Protestant, Jewish, Catholic and atheist beliefs. In his spare time he enjoys travelling, skiing, tennis, writing, playing the piano and juggling.

“Third-person effect” is a psychological phenomenon which states that you think the media doesn’t influence you but everyone else.

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TODAY'S smart marketers

To be compelling, relevant and effective, marketing across borders requires an extraordinary mix of art and science. The majority of today's large global corporations have come to successfully understand the ever-shifting global-local balance, and have also led in sharing their best practices. Most, now, are sufficiently decentralized with enough people on the ground to easily navigate individual market nuances.

There has been a long-accepted estimate that the big US-based global players may contribute to about two-thirds of the world's total ad spend. Of course, this usually means that the actual advertising budgets are spent locally. Few US companies place entire global campaigns directly from the US today unless it is a corporate image message intended for a C-Suite audience around the world.

The contemporary pioneers of the international marketing world are the less-large companies or fledgling divisions that recognize the need to reach consumers, executives or decision-makers in other markets, but without the advantage of worldwide infrastructure or immediate local knowledge. A majority of these marketers fall into categories like travel, technology, finance, corporate image, or luxury.

These strategists must become immediate experts in culture, language, customs, legalities, and media as they prepare campaigns to unfold meaningfully several continents away. They have little choice but to become "Smart Marketers" as they manage budgets like diversified portfolios across all manner of fast growth, slow

growth or no growth markets. They understand their marketing investment in 2009 will not only build market share, but will position them for better times ahead — which may be as soon as 2010 given the new Group M forecasts.*

It has never been easy to identify these cross-border marketers, nor has it ever been easy to quantify how much these players spend in their trans-national marketing efforts. Although some media tracking research exists to examine portions of pan-regional spending, there are few sources. The Internationalist has put together a list of these companies now advertising in 2009 — campaign by campaign — largely by surveying media owners and international ad reps about their current cross-border ad base while comparing these mentions to some of the measurement tools like Secodip or Datacheck. The list may not be perfect, but it's certainly a start. We hope it inspires other companies to participate in marketing across borders, and we'd like to hear from anyone not listed.

** In June, WPP's GroupM, the world's largest buyer of media, offered an early forecast of advertising growth in 2010. According to Futures Director and veteran prognosticator, Adam Smith, "the news is good." Estimates suggest that worldwide ad spending will decline 1.4% in 2010, after a decline of 5.5% this year—an indication that the recession is easing.*

Smith admitted that "few clients have decided what to spend in the fourth quarter of 2009, never mind 2010." Nonetheless, given data from WPP agencies in 70 countries, GroupM believes without question that "some sort of recovery is at hand."

TODAY'S smart marketers

CATEGORY	ADVERTISER	COUNTRY
CORPORATE IMAGE	Accenture	US
TRAVEL/TRADE	Accor	France
FINANCIAL	Ace Insurance	US
RETAIL/APPAREL	Adidas	Germany
TRAVEL/TRADE	Air France	France
TRAVEL/TRADE	Air Malta	Malta
FINANCIAL	Allianz	Germany
CORPORATE IMAGE	Artoc Group	Egypt
TRAVEL/TRADE	Austrian Tourist Board	Austria
TRAVEL/TRADE	Bakou Tourism	Azerbaijan
FINANCIAL	Bank NY Mellon Asset Mgmt	US
FINANCIAL	Bank of China	China
FINANCIAL	Bank of Tdw & Bgl, Sa.	Luxembourg
FINANCIAL	Bank PHB	Nigeria
FINANCIAL	Bank Pictet	Switzerland
TRAVEL/TRADE	Barbados Tourism Office	Caribbean Island
TRAVEL/TRADE	Baselworld Show	Switzerland
CORPORATE IMAGE	Boeing	US
TRAVEL/TRADE	British Airways	UK
TELECOMMUNICATIONS	BT Telecommunications	UK
LUXURY-FASHION	Calvin Klein Couture	US
LUXURY-WINES	Casillero Del Diablo	Chile
TRAVEL/TRADE	Cathay Pacific Airways	Hong Kong
CORPORATE IMAGE	Chevron Chemical	US
TECHNOLOGY/TELCO	CISCO — Consumer Bs. Div.	US
TECHNOLOGY/TELCO	CITRIX	US
TRAVEL/TRADE	Cuba Tourist Office	Cuba
TRAVEL/TRADE	Directski	Ireland
TRAVEL/TRADE	Dominican Republic Tourism	Dominican Republic
FINANCIAL	Dubai Int'l Finance Center	United Arab Emirates
CORPORATE IMAGE	Emerson	US
TRAVEL/TRADE	Emirates Airlines	UAE
TRAVEL/TRADE	Ethiopian Airlines	Ethiopia
RETAIL/APPAREL	Foot Locker	US
FINANCIAL	Fx Pro	Cyprus
CORPORATE IMAGE	Gaz De France Suez	France
CORPORATE IMAGE	GE	US
TRAVEL/TRADE	Great Britain Tourism	UK
FINANCIAL	GTBank	Nigeria
TECHNOLOGY/TELCO	IBM	US
TRAVEL/TRADE	Inter Continental Hotels	UK
FINANCIAL	Interactive Brokers	US
FINANCIAL	Intercontinental Bank	Nigeria



TODAY'S SMARTMARKETERS

CATEGORY	ADVERTISER	ORIGIN
TRAVEL/TRADE	Invest In Macedonia	Macedonia
TRAVEL/TRADE	Israeli Tourism	Israel
TRAVEL/TRADE	Krakow Tourism	Poland
TRAVEL/TRADE	Kuwait Development	Kuwait
LUXURY	Longines	Switzerland
TRAVEL/TRADE	Macau Tourist Board	Macau
TRAVEL/TRADE	Macedonia Tourist Board	Macedonia
TRAVEL/TRADE	Malaysian Tourist Board	Malaysia
TRAVEL/TRADE	Maltese Tourist Board	Malta
CORPORATE IMAGE	Masdar Project Abu Dhabi	United Arab Emirates
TRAVEL/TRADE	Mexican Tourist Board	Mexico
TRAVEL/TRADE	Miami Convention & Visitors Bureau	US
TRAVEL/TRADE	Michigan Economic Dev.Cor	US
CORPORATE IMAGE	Monsanto	US
TRAVEL/TRADE	Montenegro Tourism	Montenegro
FINANCIAL	Natixis	France
TECHNOLOGY/TELCO	NEC	Japan
TECHNOLOGY/TELCO	Nikon	Japan
LUXURY	Omega	Switzerland
TRAVEL/TRADE	Orascom Hotels & Develop.	Egypt
TECHNOLOGY/TELCO	Orascom Telecom	Egypt
MEDIA/ENTERTAINMENT	Paramount	US
TRAVEL/TRADE	Peru Tourist Office	Peru
CORPORATE IMAGE	Philips	Netherlands
TRAVEL/TRADE	Qatar Airways	Qatar
FINANCIAL	Qatar Financial Center	Qatar
TRAVEL/TRADE	Relais & Chateaux	France
LUXURY	Rolex	Switzerland
TRAVEL/TRADE	Royal Air Maroc	Morocco
TRAVEL & TOURISM	Royal Jordanian	Jordan
TRAVEL/TRADE	Ryanair	Ireland
CONSUMER GOODS	Samsonite	Belgium
CORPORATE IMAGE	Samsung	South Korea
TECHNOLOGY	Satyam	India
CORPORATE IMAGE	Schüco	Germany
CORPORATE IMAGE	Shell	Netherlands
CORPORATE IMAGE	Siemens	Germany
TRAVEL/TRADE	Singapore Airlines	Singapore
MEDIA/ENTERTAINMENT	Sony Pictures Classics	US
FINANCIAL	Standard Chartered Bank	Hong Kong
TRAVEL/TRADE	Stena Line	Sweden
CORPORATE IMAGE	Suzlon Energy	India
LUXURY	Swatch Groupe	Switzerland

CATEGORY	ADVERTISER	ORIGIN
MEDIA/ENTERTAINMENT	Thomson Reuters	US
LUXURY	Tissot Watches	Switzerland
TRAVEL/TRADE	Trade Promotion of Iran	Iran
TRAVEL/TRADE	Turkish Airlines	Turkey
TRAVEL/TRADE	Tuscany Tourism	Italy
MEDIA/ENTERTAINMENT	Twentieth Century Fox	US
CORPORATE IMAGE	Veolia Environnement	France
CORPORATE IMAGE	Vestas	Denmark
MEDIA/ENTERTAINMENT	Walt Disney Motion Pictures	US
MEDIA/ENTERTAINMENT	Warner Bros Cinema	US
CORPORATE IMAGE	Zayed Future Energy	United Arab Emirates
FINANCIAL	Zenith Bank	Nigeria
FINANCIAL	Zurich Financial	Switzerland

A LOOK AT KEY SECTORS: TRAVEL/TRADE

Without question, the Travel/Trade category is currently among the most visible sectors in terms of cross-border marketing. Tourist boards and industrial development organizations in particular believe that advertising will fuel sorely-needed business. We've sub-divided the category by: Airlines, Tourist Boards, Industrial Development, Hotels, Destinations/Events, Ferries, Trains And Travel Packages.



AIRLINES

Qatar Airways	Qatar
Turkish Airlines	Turkey
Cathay Pacific Airways	Hong Kong
Emirates Airlines	UAE
Singapore Airlines	Singapore
Royal Jordanian	Jordan
Air Malta	Malta
British Airways	UK
Air France	France
Ethiopian Airlines	Ethiopia
Finnair	Finland
Ryanair	Ireland
Royal Air Maroc	Morocco
Kenya Airways	Kenya
One World	US

TOURIST BOARDS

Malaysian Tourist Board	Malaysia
Macedonia Tourist Board	Macedonia
Maltese Tourist Board	Malta
Montenegro Tourism	Montenegro
Tuscany Tourist Board	Italy
Cuba Tourist Office	Cuba
Barbados Tourism	Caribbean Island
Turkish Tourist Board	Turkey
Bakou Tourism	Azerbaijan
Austrian Tourist Board	Austria
Peru Tourism Office	Peru
Great Britain Tourism Ofc	UK
Macau Tourist Board	Macau
Dominican Republic Tourism	Dominican Republic
Albania Tourism	Albania
Botswana Tourism	Botswana
Krakow Tourism	Poland
Cabo Verde Tourism	Cape Verde
Chinese Tourist Board	China
Mexican Tourist Board	Mexico
Moscow Tourist Office	Russia
Taiwan Tourist Board	Taiwan
Seychelles Tourism Off.	Seychelles
West Bengal Tourism	India
Conseil Reg.Rhone-Alpes	France
Goa Tourist Office	India
Iran Tourism	Iran
Cameroon Tourist Board	Cameroon
Israeli Tourism	Israel
Miami Convention & Visitors Bureau	US
State Of California	US
Texas Tourism	US



HOTELS

Accor	France
Relais & Chateaux	France
Inter Continental Hotels	UK
Orascom Hotels & Develop.	Egypt
Société Des Bains De Mer	Monaco
Starwood Preferred Guest	US
Grand Resort Lagonissi	Greece
Elounda Beach Hotel	Greece
Alliance Hotellerie	Ghana
Hyatt	US

OTHER TRAVEL

Ferries	STENA LINE	Sweden
Train Travel	SNCF	France
Train Travel	HEATHROW EXPRESS	UK
Travel Packages	DIRECTSKI	Ireland

DESTINATIONS/EVENTS

Mawasine Music Festival	Morocco
Qatar Masters	Qatar
Golf In Dubai	UAE
Dubai Rugby 7 Cup	UAE
Aigle Azur	France
Dubai World Cup	UAE

INDUSTRIAL

Invest Macedonia	Macedonia
Trade Promo.Organiz.Iran	Iran
Michigan Economic Dev.Cor	US
Nation.Priv.Invest.Agency	Angola
Kuwait Development	Kuwait
Namibia Expansion	Namibia
South Africa Development	South Africa
Malaysian Trade Commiss.	Malaysia
Ifema	Spain
Taiwan Excellence Awards	Taiwan
Qatar Science&Technology Park	Qatar
Wallonia Development	Belgium
Seoul Development	South Korea
Cabo Verde Development	Cape Verde

DEVELOPMENT

A LOOK AT KEY SECTORS: FINANCIAL

The financial advertising category was one that saw immediate reactions to the recent banking and credit crunch. However, some key companies around the globe are willing to use these time to build greater international awareness and overall marketshare.

A SURPRISING CATEGORY: GAMING

One of the surprisingly robust ad categories, particularly now on European television, is Online Gaming. These websites allow for contests, wagering and learning casino games like poker. There is significant legislation underway on a country by country basis to curb gaming advertising and to limit such sites. Nonetheless, gaming represents a sizable cross-border category in 2009.

Fulltiltpoker	UK
Pkr Ltd	UK
Pokerheaven	UK
Casinojoy Com	Malta
Bwin	UK
Pkr Tournament	UK

ADVERTISER	COUNTRY OF ORIGIN	REGION
Bank Of China	China	Asia Pac
Standard Chartered Bank	Hong Kong	Asia Pac
Fx Pro	Cyprus	Europe
April Assurances	France	Europe
Natixis	France	Europe
Allianz	Germany	Europe
Deutsche Bank	Germany	Europe
Bank Of Tdw & Bgl	Luxembourg	Europe
Bank Pictet	Switzerland	Europe
Dukascopy	Switzerland	Europe
Zurich Financial	Switzerland	Europe
Barclays Bank	UK	Europe
HSBC	UK	Europe
Banque Phb	Nigeria	Mid E-Africa
GTBank	Nigeria	Mid E-Africa
Intercontinental Bank	Nigeria	Mid E-Africa
Zenith Bank	Nigeria	Mid E-Africa
Qatar Financial Center	Qatar	Mid E-Africa
Ameinfo Financial Service	United Arab Emirates	Mid E-Africa
Dubai Int'l Finance Center	United Arab Emirates	Mid E-Africa
Royal Bank of Canada	Canada	N. America
Ace Insurance	USA	N. America
Ameritrade	USA	N. America
Bank NY Mellon Asset Mgmt	USA	N. America
FXCM	USA	N. America
Interactive Brokers	USA	N. America
Nasdaq	USA	N. America
Vector Vest	USA	N. America
Velez Capital	USA	N. America
Western Union	USA	N. America

REGIONAL HUBS STILL EXIST...

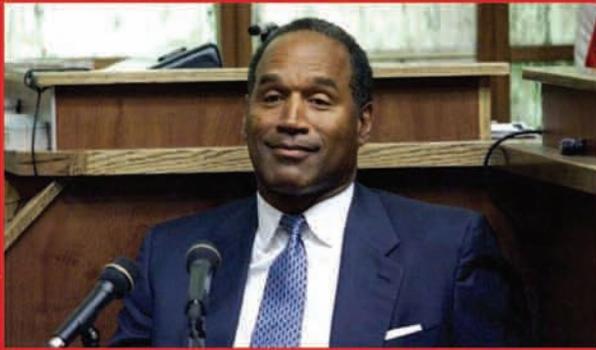
Given its geography and close borders, Europe remains a strong center for transnational advertising. London, without question, is the agency hub for so many of these multi-local and pan-regional campaigns, including many U.S. marketers targeting Europe.

Another undisputed hub is Miami for Latin American regional decision-making, although the "region" is generally dominated by a collection of very different local campaigns in Portuguese-speaking Brazil, Mexico (technically part of North America), Argentina, Venezuela and sometimes Chile.

Dubai is the center of cross-border marketing for the Gulf Region, the broader Middle East, and the Arabic-speaking

world extending into North Africa. Abu Dhabi, though, is growing in importance.

In Asia, Singapore is still a hub for multinational marketers and many agencies with international roles. Hong Kong is home to some key travel and financial advertising. Shanghai and Beijing now boast a great number of network and independent ad agencies, but these operations tend to serve Greater China. Japan continues as an independent center. With the exception of Tourism and Technology/Outsourcing, we're not yet seeing too many international campaigns from India to other countries. No doubt, that, too, will change.





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A LOOK AT KEY REGIONS: NORTH AMERICA

The U.S. is home to a majority of the world's biggest global marketers; however, such giants are large enough to use decentralized local offices and local ad agencies. Here a snapshot of some companies whose international strategies are planned and placed directly from the U.S.

Mexico is making significant current investments in their Tourism campaign to directly counteract the news of the H1N1 flu virus. Canadian banks have fared better than most in today's economic environment.

CATEGORY	ADVERTISER	CATEGORY	ADVERTISER
CONSUMER GOODS	Coca Cola	LUXURY-FASHION	Tom Ford
CONSUMER GOODS	Foot Locker	LUXURY-FASHION	Weatherproof **
CONSUMER GOODS	Guthy Renker	MEDIA/ENTERTAINMENT	Paramount
CONSUMER GOODS	Schering Plough	MEDIA/ENTERTAINMENT	Sony Pictures Classics
CORPORATE IMAGE	Accenture	MEDIA/ENTERTAINMENT	Thomson Reuters
CORPORATE IMAGE	Boeing	MEDIA/ENTERTAINMENT	Twentieth Century Fox
CORPORATE IMAGE	Chevron Chemical	MEDIA/ENTERTAINMENT	Walt Disney Studios Motion Pictures
CORPORATE IMAGE	Chevron	MEDIA/ENTERTAINMENT	Warner Bros Cinema
CORPORATE IMAGE	Emerson	TECHNOLOGY	CISCO- Consumer Bs. Div.
CORPORATE IMAGE	GE	TECHNOLOGY	CITRIX
CORPORATE IMAGE	Monsanto	TECHNOLOGY	IBM
CORPORATE IMAGE	Ace Insurance	TECHNOLOGY	Intel
CORPORATE IMAGE	Ameritrade	TECHNOLOGY	Microsoft
CORPORATE IMAGE	Bank Ny Mellon Asset Mgmt	TECHNOLOGY	Hyatt
CORPORATE IMAGE	FXCM	TECHNOLOGY	Miami Convention & Visitors Bureau
CORPORATE IMAGE	Interactive Brokers	TECHNOLOGY	Michigan Economic Development Corp
CORPORATE IMAGE	NASDAQ	TRAVEL/TRADE	One World
CORPORATE IMAGE	Vector Vest	TRAVEL/TRADE	Starwood Preferred Guest
CORPORATE IMAGE	Velez Capital	TRAVEL/TRADE	State of California
CORPORATE IMAGE	Western Union	TRAVEL/TRADE	Texas Tourism
CORPORATE IMAGE	Sotheby's	TRAVEL/TRADE	Mexican Tourist Board
CORPORATE IMAGE	Calvin Klein Couture	FINANCIAL	Royal Bank Of Canada
CORPORATE IMAGE	Cartier *	TRAVEL/TRADE	Ontario Ministry Of International Trade & Investment
LUXURY-FASHION	Gucci *		
LUXURY-FASHION	Louis Vuitton **		
LUXURY-FASHION	Michael Kors		
LUXURY-FASHION	Ralph Lauren **		
LUXURY-FASHION	Tiffany **		

* The New York office of these French retailers are responsible for marketing to Latin America, especially Mexico, Argentina and Brazil
 ** These fashion marketers create cross-border campaigns for Canada

TODAY'S smart marketers

Colgate Palmolive
Procter & Gamble
Reckitt Benckiser
Unilever
Danone
Sony Ericsson
Nissan Motors
Epson
The Coca Cola Company
Nestle
Hewlett Packard
20th Century Fox
S.C. Johnson & Son Inc.
General Motors Company
Warner Bros.
Telefonica
Telcel
Universal Pictures
HBO
L'Oreal
Pepsico
Walt Disney Pictures
Sony Corporation
Sony Pictures
Visa

A LOOK AT KEY REGIONS: LATIN AMERICA

This list looks at this year's top marketers in pan-regional TV with campaigns running in a combination of Argentina, Brazil, Mexico and Venezuela, as measured by DATACHECK.

“Overall across the TOP 10 categories in 2008 we see a slight increase of 6% in 2009 which is an indicator that the LatAm region is not as dramatically affected as other regions. Nevertheless, there has been a significant drop in a couple of categories but to counteract this drop we are seeing a substantial growth in categories such as Household Products/Cleaners/Detergents and Theatrical Films. Regarding Theatrical Films, there is a correlation with the the Box Office numbers showing an overall increase in movie attendance in all markets, except in Mexico during February and March where the swine flu virus kept people indoors. This is a good indicator that during this crisis people are turning to movies because is affordable entertainment so the studios are increasing spending which is paying off.”

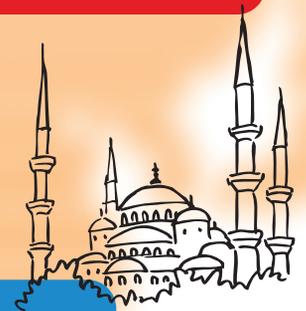


Lourdes Espinoza, Data Check

A LOOK AT KEY REGIONS: EURASIA

Eurasia is increasingly used to refer to the Central Asia countries and the Transcaucasian republics. Both Turkey and Iran are now considered key markets to watch as both are part of the N-11, or the Next Eleven, Goldman Sachs' term for the fast-growth countries beyond the BRIC markets.

TRAVEL/TRADE	Bakou Tourism	Azerbaijan
TRAVEL/TRADE	Iran Tourism	Iran
TRAVEL/TRADE	Trade Promotion Organization Of Iran	Iran
TRAVEL/TRADE	Turkish Airlines	Turkey
TRAVEL/TRADE	Turkish Tourist Board	Turkey





MIDDLE EAST

CATEGORY	ADVERTISER	COUNTRY OF ORIGIN
TRAVEL/TRADE	Israeli Tourism	Israel
TRAVEL & TOURISM	Royal Jordanian Airlines	Jordan
TRAVEL/TRADE	Kuwait Development	Kuwait
TRAVEL/TRADE	Qatar Airways	Qatar
FINANCIAL	Qatar Financial Center	Qatar
TRAVEL/TRADE	Qatar Science & Technology Park	Qatar
TRAVEL/TRADE	Qatar Masters	Qatar
CORPORATE IMAGE	Qatargas	Qatar
TRAVEL/TRADE	Saudi Arabia Development	Saudi Arabia
TRAVEL/TRADE	Emirates Airlines	UAE
FINANCIAL	Dubai International Finance Center	UAE
CORPORATE IMAGE	Zayed Future Energy	UAE
CORPORATE IMAGE	Masdar Project Abu Dhabi	UAE
TRAVEL/TRADE	Golf In Dubai	UAE
TRAVEL/TRADE	Dubai Rugby 7 Cup	UAE
FINANCIAL	Ameinfo Financial Service	UAE
TRAVEL/TRADE	Dubai World Cup	UAE
TRAVEL/TRADE	Cityscape Development	UAE

AFRICA

CATEGORY	ADVERTISER	COUNTRY OF ORIGIN
TRAVEL/TRADE	National Private Investment Agency	Angola
TRAVEL/TRADE	Botswana Tourism	Botswana
TRAVEL/TRADE	Cameroon Tourist Board	Cameroon
TRAVEL/TRADE	Cabo Verde Tourism	Cape Verde
TRAVEL/TRADE	Cabo Verde Development	Cape Verde
TECHNOLOGY/TELCO	Orascom Telecom	Egypt
TRAVEL/TRADE	Orascom Hotels & Development	Egypt
CORPORATE IMAGE	Artoc Group	Egypt
TECHNOLOGY/TELCO	Mobinil	Egypt
TRAVEL/TRADE	Ethiopian Airlines	Ethiopi
TRAVEL/TRADE	Alliance Hotellerie	Ghana
TRAVEL/TRADE	Kenya Airways	Kenya
TRAVEL/TRADE	Royal Air Maroc	Morocco
TRAVEL/TRADE	Mawasine Music Festival	Morocco
TRAVEL/TRADE	Namibia Expansion	Namibia
FINANCIAL	Zenith Bank	Nigeria
FINANCIAL	Intercontinental Bank	Nigeria
FINANCIAL	Gtbank	Nigeria
FINANCIAL	Bank PHB	Nigeria
TRAVEL/TRADE	Seychelles Tourism Office	Seychelles
TRAVEL/TRADE	South Africa Development	South Africa

**A LOOK AT KEY REGIONS:
MIDDLE EAST
& AFRICA**

This sweeping area of the world now hosts many new trans-national, pan-regional and global advertisers. Although much activity is from development in the Gulf Region and Emirates, there are many marketers now throughout Africa—principally in the Travel/Trade sector, but also in other categories—perhaps for the first time.

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Smart Marketers See Opportunity

By Michael Moszynski and Elliot Polak

There is no shortage of reports today on “Recession Marketing.” Current reality is that we are living amid a credit crunch, and companies now have an urgent requirement to maintain liquidity. Most have to cut expenditure wherever they can to stay in business—and that often includes the marketing budget.

Our goal is to find examples of exceptional brand resilience and inventiveness, which can be exported or imported back in a different form, to help other brands cope and grow when under pressure. As a result, we found two

questions to be pivotal to “seeing the opportunity in every difficulty.”

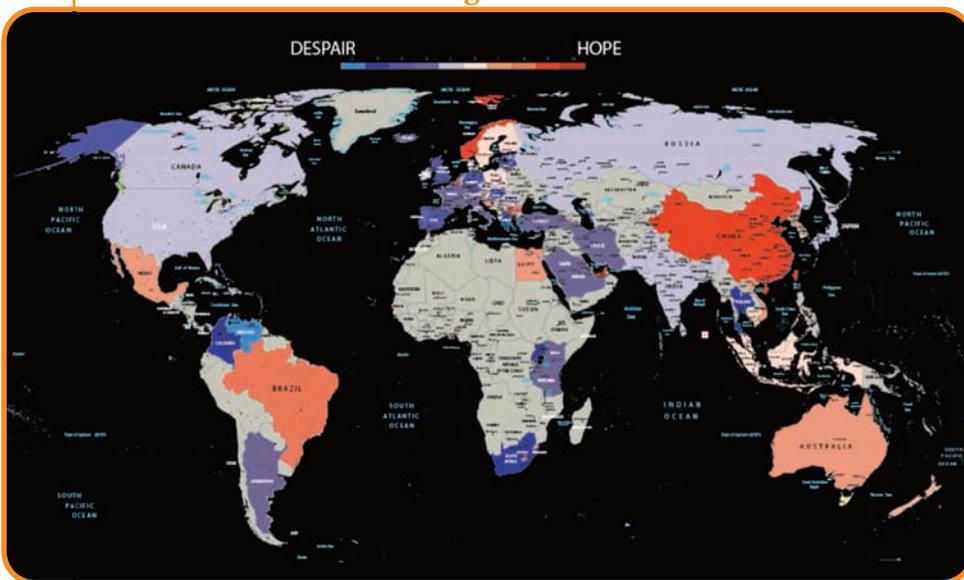
1. How are brands around the world responding to economic pressure?
2. How can we learn from brands that have seized the recession as an opportunity?

We hope that in whatever sector you work and in whatever markets you operate, you might find something useful to enhance the effectiveness of your marketing spend — no matter how much reduced it may be.

“A pessimist sees the difficulty in every opportunity. An optimist sees the opportunity in every difficulty.”

..... Winston Churchill

The First Global Marketing Sentiment Index



south towards Turkey, there remains a bright, burning red optimism in China. In fact, China, Norway and the Arab Emirates are most optimistic, while Brazil, Mexico, Romania and Egypt follow. Other optimists, although a bit more reserved, include other Nordic countries and Belgium.

Hundreds of examples were reviewed in order to evaluate any trends that emerged internationally, as well as to focus on any specific examples that provide useful ‘food for thought’ for clients in other countries or sectors across the world.

How are brands around the world responding to economic pressure?

Denial.

In some parts of South America, we still see denial. The recession is claimed to be something happening elsewhere, in the Western world, and declared not applicable.

In Argentina for example, Walmart cleverly uses this desire not to worry about the future, by telling consumers not to save

Given the importance of marketing expenditure as a “bellwether” in highlighting overall economic trends, we thought it would be useful to conduct the first ever global survey of sentiment in the marketing community. We wanted to gauge how key markets would indicate their stage of recession by responding to an optimism-pessimism scale.

The first result of the LONDON Textapeal Global Marketing Sentiment Index is -0.3 (on a scale of -5 to +5). This is more optimistic than we originally imaged as it indicates that the decline in the world economy has now slowed almost to a stop. This is highly contrasted by market and region. Despite finding a “band of despair” running diagonally through Europe and

— “No ahorres” — which also means “don’t hold back” (on the good things in life), thanks to savings you get at Walmart.

Blame.

In countries that “love to hate” capitalism or are late-comers to capitalism, we see blame.

In France, a country with lingering suspicion of bankers, a low cost airline says “hurry up to buy tickets or the bankers will take them all” - it being understood that bankers are all crooks and need to flee.

With a startling sense of humor, the French government-owned TGV high-speed train company proposes that travelers take advantage of their new link to Geneva to evade French taxes.

Flight to Frugality.

If frugal is the new chic, India is the master of outstanding frugal advertising creativity. In a country that prides itself on self-sufficiency, an electric bike company shows American GIs with nothing to do anymore, claiming "no fuel, no war."

Patriotism.

The United States has always had a strong grassroots patriotic tradition. In this relatively young country, being proud of the stars and stripes is nothing to be ashamed of, as Trojan condoms shows with a commercial that proposes to "ride the recession out together." This also demonstrates how fun, low cost activities are on the upturn everywhere!

Jujitsu.

Jujitsu requires the ability to turn a disadvantage into an advantage. China shows enormous appetite to use the crisis as a way to grow market share. A Chinese ad for a new LG phone packed with luxurious features and 2 GSM cards is not apologetic. It proposes to help turn its owners into "two armed warriors against the recession," by allowing them to manage their family "with their left hand" and their business "with their right hand."

Innovation.

Innovation is often the result of exceptional response to exceptional pressure. In a flat property market in Vietnam, an individual used the argument of resident swallow nests — an expensive local delicacy — to attract buyers. This tactic is now being used by established local real estate companies.

Optimism.

We have all had enough bad news, so sometimes a good dose of optimism is what we need. From all the work we reviewed we identified 3 types of optimism:

1. **American optimism** which assumes the universal right to be happy right now, and is wonderfully expressed by Coca-Cola's happiness factory commercials.
2. **Asian optimism** which tells us the future will be bright if we work hard and are responsible. Why buy insurance during a recession? An Indian company has developed a highly successful and iconic campaign based on the uplifting reminder Jeetey Raho! which means "Life is Long!"
3. **European optimism** which recognizes that there is little to be optimistic about, and needs to use hard facts to remind us things are not as bad as they seem.

The Italian financial services provider Fineco reminds people that only 23 percent of them are happy with Italy's TV programmes, but a whopping 91 percent are happy with Fineco's service.

How can we learn from brands which have seized the recession as an opportunity?

It is clear that the scale of the recession has had a big impact of the psychology of consumers across the world, especially as it has come after an unprecedented period of economic growth for many countries. This in turn has changed people's attitudes and behavior. For brands attuned to these changes it is possible to create opportunities to improve their fortunes (or at least minimize the impact of the downturn).

Here are our top ten tips:

1. **Identify with the Zeitgeist.** It is as true today as it has always been that people buy emotionally and justify their decision rationally. Just because the conventional thinking is that everyone is more price-conscious does not mean the only way to generate more sales is to drop your price. Instead, you can better

Methodology:

We asked our question of hope and despair in early June 2009 to Textappeal's network of over 100 local strategic planners, covering some 78 percent of the world's population. We will repeat this exercise each quarter to track movements on a local and global basis.

Then we followed by requesting the best (and worst) examples of how companies in their market had used marketing or advertising to respond to the recession. The following countries were reviewed:

Argentina	India	Romania
Australia	Indonesia	Russia
Austria	Iran	Saudi Arabia
Brazil	Italy	Singapore
Canada	Japan	Slovakia
Chile	Kenya	Slovenia
China	Korea	South Africa
Colombia	Latvia	Spain
Croatia	Lithuania	Sweden
Czech	Macedonia	Taiwan
Denmark	Malaysia	Tanzania
Egypt	Mexico	Thailand
Estonia	Nigeria	Turkey
Finland	Netherlands	Uganda
France	Norway	United Arab Emirates
Germany	Pakistan	United Kingdom
Greece	Poland	United States of America
Hungary	Portugal	Venezuela
Iceland	Puerto Rico	Vietnam

identify with people's emotional needs than your competitors. Here are three examples:

a. **Less is more.** A great example by De Beers of confident marketing that reflects that the age of excess is over: "Fewer, better things." It may not have got sales back to 2007 levels (it didn't) but it was true to its brand and its long term positioning "A diamond is forever".

b. **Inconspicuous consumption.** There are still people buying luxury goods as Harry Winston jewellers can confirm. However, there is a growing trend for their customers to request 'home shopping' as they don't wish to be seen buying such items.

c. **Emotional comfort.** When people feel uncertain about their personal financial situation there is a huge desire to curl up both emotionally and physically. "The Snuggie," introduced in the US, was the perfect response – a fleece blanket with arms and an ad campaign that became an icon of its time. (The spoof generated over 4 million views on YouTube.)

2. **Turn Green into Greenbacks.** Was it only 8 months ago when every brand was jumping on the carbon neutral bandwagon? The change is that many brands in the automotive and energy sectors now lead on the financial savings that environmentally friendly products generate.

“The really successful brands of the future are those already positioned for the next upturn.”

Three examples:

a. **Car industry** – universal promotion of savings from fuel efficiency.

b. **Eni Energy, Italy** — actively promotes how customers can use 30% less of its product.

c. **Fiat Eco Drive** — A driver inserts a memory stick into the dashboard to monitor driving behavior. When plugged into a PC, the data will inform the driver how to amend driving habits to typically save 15% fuel.

3. *Empathize with your customers.*

The best example of this we discovered was in Spain by Carrefour, which launched its own consumer pressure group "Mothers against the crisis." Given people have less money to buy new clothes, Carrefour thought that it would make sense to show how to take better care of clothes and make them last longer.

The retailer created an ad depicting an association of women, who want to look great during difficult economic times, recommending Carrefour's softeners and detergents. This highly amusing approach resulted in several fan clubs appearing on Facebook and generated significant coverage in the blogosphere.

4. *Market in one country to sell in another.*

We all know that the web gives any company a global retail channel. Given that this is the first global recession in the age of the internet perhaps it is not surprising that a number of brands have taken advantage of this.

eBay in Europe saw the opportunity of the devaluation of Sterling to promote its UK site in the rest of the Continent.

5. **Reach new customers.** Dr. Thomas Nagle, founder of the Strategic Pricing Group and author of *The Strategy and Tactics of Pricing*, recently wrote, "What

makes recessions such good times to leverage existing advantages is that cash-strapped, or at least saving-motivated, customers are open to making changes they would not have made before."

A great demonstration of this sentiment is McDonald's launch of McCafe, just when there was price resistance to the Starbucks of the world. McCafe even created an online campaign (www.unsnobbycoffee.com) enabling people to "help friends kick the snobby coffee habit."

This contrasts with the Starbucks response, which was to downshift its brand into McDonald's territory through the launch of "Value Meals." We've got to see the results. This may be a brand that works best in owning the high ground of "emotional comfort."

6. *Steal ideas from other countries/sectors.*

One effective tactic is to take a successful example from one market and adapt it to suit another. A good example is the introduction of Mother's Day in Vietnam by Dutch Lady. This newly imported occasion was used to aid the promotion of Dutch Lady's powdered milk through tulip giveaways. The slogan "Thanks Mom" which became associated with the brand.

7. **Think Ahead.** The recession is not going to be here to stay, so the really successful brands of the future are those already positioned for the next upturn.

A good example of this approach is Mike Lynch, the Founder of Autonomy, Europe's second largest software developer. He focused the company's efforts during the boom on a product that would sell well in recession. As a result, last year they were able to market a piece of software that helps financial services companies identify fraud. Result? Profit up 112% in Q1 2009.

8. **Unleash a big idea.** In 1990 after the first Gulf War when the entire world

was petrified of flying, British Airways launched 'The World's Biggest Offer' in 68 countries and neutralized the issue overnight as everyone became more concerned about which destination they wanted to visit for free.

9. **Be true to your brand.** This tip is to avoid long term disaster. It takes years to develop a strong brand and moments of ill-advised marketing activity to potentially destroy it.

The French luxury brand Maboussin decided to make a splash by running a campaign focusing on price. But luxury is not a question of price; it is a question of taste and lifestyle. This approach has jeopardized the reputation and positioning of the company.

10. **Be the first brand to own optimism globally.** While we have seen examples of brands in individual markets latching on to certain kinds of optimism on a local level, it struck us that there is a significant opportunity for a brand to do this globally. We do, after all, live in an inter-connected world and one in which sentiment can be a significant driver in economic recovery.

Let's not forget Barack Obama and the brilliant speech he gave after losing the New Hampshire Primary in his bid to secure the Democratic nomination for President of the United States of America.

Watching that speech was a musician, Will.i.am of the Black Eyed Peas. He was inspired to create a song and video around that speech, which is considered the most powerful piece of communication in the last decade. Al Gore credited it as being instrumental in helping a black man secure the Presidency.

The same opportunity exists for a brand to take the challenge to develop a piece of communication that can achieve a similar level of positive emotion for the world.

Yes, we can.

ABOUT THE AUTHORS & THEIR COMPANIES:



Michael Moszynski is CEO of **LONDON**, a new type of global advertising agency recently launched in November 2008.

LONDON has won clients on every continent in its first three months, including the global Mandarin Oriental account, as well as Ketel One Vodka (US), Nolet's Distillery (Europe), Majid Al Futtaim (Middle East), Glo Mobile (Africa), The Government of South Australia and Mosaic, The Prince of Wales Charity. The agency has pioneered a unique working model facilitated by the internet, which brings London-quality ideas to the world, from one central HQ without expensive and unnecessary overseas bases.

Prior to **LONDON**, Michael Moszynski enjoyed a long career of managing global accounts and launching offices for the Saatchis in Asia, New York, London and the Middle East. He, and fellow founding partner and creative director of M&C Saatchi, Alan Jarvie, formed **LONDON**.



Textappeal was founded in 1998 by the American cross-cultural expert **Elliot Polak** and the French Strategic Planner Fabienne Polak. They believed as the world became more global, there would be a need to translate brand and product campaigns across borders in a more effective way than before.

Over the past 12 years, they have developed a carefully hand-picked network of 700 brand experts embedded in local markets around the globe that covers 151 local markets and 98 percent of the world's population.

Today **Textappeal** is a leading cross-cultural marketing specialist. It helps global brands cross borders successfully, from a single multilingual hub based in the cosmopolitan city of London.

Textappeal works for megabrands such as Allianz, Barclays, BP, CNN, Costa Coffee, Mandarin Oriental, Nikon, Sony, Starbucks, Swarovski and Vertu. It also partners with lead creative agencies to win pitches and manage international clients.

LONDON and **Textappeal**'s now offer a joint value proposition to create international advertising **BETTER. FASTER. CHEAPER.** Their focus is to help clients maximize the effectiveness of their reduced spend, and demonstrate that a London-based alternative to a traditional network agency can access local insight and best practice from across the globe.

Engaging With Media In The Future: *how consumers & marketers will change by 2015*

Bristow identified how consumers will engage with media in 2015, and also how marketers will need to evolve in order to succeed. Unilever, together with media buying company Mindshare and media owner ESPN, offered four scenarios of how the media world would look in the near future, and developed recommendations for marketers as well as media owners and agencies on how to prepare for these changes and thrive with innovation.



Rachel Bristow, Marketing Communications and Buying Manager of Unilever U.K. recently presented her views as part of the IAA's Digital Download Forum Series. The International Advertising Association invited key industry experts to share their thoughts on the real issues are behind the headlines.

Sponsored globally by Microsoft, along with support from EuroNews and The Internationalist, the IAA Digital Download series is a provocative, invitation-only, thought leadership program that examines the state of the online advertising industry around the world. Its goal is to provide unprecedented insights into those topics now influencing the global marketing industry, and to raise awareness around core issues affecting digital advertising — today and tomorrow

Likely or inevitable factors

Bristow predicts that by 2015:

- internet bandwidth will grow in traffic and capacity
- the current digital generation of online users will age
- information availability will become more pervasive
- people will spend more time travelling
- devices will continue to converge
- the general population will age and become even more diverse

Uncertain factors

Areas more difficult to predict:

- the future trend and direction of social media
- the pace of technological change
- the extent to which audiences will feel an information overload
- what the mobile device of 2015 will look like and do
- the effect of further media fragmentation
- how much customization there will be
- the degree to which people and governments will care about privacy
- how well traditional media brands will adapt to the changing environment

The media world in 2015

According to Bristow, the media environment in 2015 will be divided along two key parameters:

1. **Attention:** the individual attention of consumers
2. **Access scale:** the availability for them to access media.

Along the attention scale, one end will represent consumers who feel empowered by multiple media sources and are at ease with fragmented consumption. The other end will represent consolidated consumer attention through a concentration on a limited number of trusted sites.

Possible Media Scenarios of 2015:

SCENARIO 1: TONS OF TWITTER

Highly-fragmented consumer attention / High-access fluidity. The “Tons of Twitter” scenario represents an ever-present media lifestyle with a consumer group that is free to navigate through media competitors. These individuals also have a high degree of control over how they access information/entertainment by using a great variety of sources and services. They enjoy seamless media access from multiple locations and spend a large proportion of time receiving, searching for, and sharing information and entertainment for work and leisure. These consumers expect that services, promotions and communications will be tailored to their location and time needs. Given the abundance of media options available to them, their attention spans will be short and their loyalties low.

Evidence:

- The evidence for this scenario already exists in places with city-wide wireless broadband.
- Plus, 4G WiMax is expected to be available to most of the U.S. population by 2011, enabling highly fluid access to media.
- MRI research portrays a consumer population that is already naturally fragmented in attention.
 - A 2008 study revealed that 51% of TV watching occurs while consumers doing something else
 - 62% of online use out-of-home is done while simultaneously working
 - 9% of magazine reading is also consumed while watching TV.
- Furthermore, there are already 80+ cable networks, 14,000 radio stations, 6800 consumer magazines, 228 million video games sold annually, providing an abundance of media for consumers to choose from.

Marketing Challenge:

In the “Tons of Twitter” scenario, the many media involved will have to fight for the short attention of consumers. Winning loyal followers will be a challenge.

Implications for marketers:

- The way marketers tell stories will need to change – a narrative development through innovative bites and snippets will suit the media consumption pattern of this audiences.
- Word of mouth will also be strong and marketers will need to think of PR strategies to encourage this.
- Research priorities also need to emphasize on listening to and observing the audiences.

Implications for media owners:

- Media owners will need to create content that is seamless, optimized to devices, customized and customizable.
- They will also need to establish good relationships with device makers and develop advanced mechanisms that will understand and adapt to consumer behavior.
- Given the need for their content to be everywhere all the time – media owners may need new distribution partnerships.

Implications for media agencies:

- Because of the enormous amount of data generated in this scenario, agencies need to help clients by investing in sophisticated data analytics and data mining.
- Agencies may also have a role to play in bringing together data from different partners and advocating new standardized metrics.

SCENARIO 2: PORTAL OF ME

Consolidated consumer attention / High-access fluidity. In the “Portal of Me” scenario, consumers relinquish control of finding information and entertainment to trusted third party services in return for the convenience of having their media, information and entertainment delivery tailored to their needs. Such consumers will give out highly personal data to media and service providers in return for customized services like food and beverage recommendations based on their calendar activities or suggested travel routes calculated from GPS data from their vehicles. As a result, everything that media partners provide in this scenario is built around consumers’ stated and learned needs. Consequently, this fosters a deep consumer trust and loyalty toward the media – which is dependent on the individual media’s transparency and delivery of value.

Evidence:

- There are already millions of online users of highly personalized internet portals and services like Facebook (110 million users), iGoogle (21 million users), and custom internet radio like last.fm (21 million users.)
- A 2008 Techweb survey also indicated that 59% of 16-24 year-olds like to customize products to express their personal style.
- A 2008 Nielsen survey indicated that the top (non-email) mobile websites are big brands like Google Search, Weather Channel, ESPN, Google Maps, MapQuest.abundance of media for consumers to choose from.

Marketing Challenge:

The challenges of the Portal of Me scenario is gaining and sustaining consumer trust. Naturally, transparency and well-regulated and enforced codes of conduct are critical in earning this trust.

Implications for marketers:

- Due to the highly personalized use of information in this scenario, marketers will need to develop consumer relationships through key portals and/or media partners.
- Marketers will face challenges in low-interest product categories that are typically ignored by consumers.
- In the “Portal of Me,” consumers are empowered to choose their media, so marketers need to make sure everything they use niche segments to provide useful information.

Implications for media owners:

- Media owners will need to develop on new distribution sources if they are not a successful key consumer portal/partner. This may mean building partnerships with other successful portals/partners.
- They will also need to offer additional services and utilities (e.g. discovery, guidance, news) to keep consumers involved, and also act as brokers to enable customers and advertisers to “discover” each other.

Implications for media agencies:

- Agencies need to get good at understanding how to obtain audience permission.
- They will also need to become skilled at re-aggregating data and behavioral targeting to deliver relevant content for each individual consumer.
- There will also be a new focus on creative content as a way to reach niche audiences. Therefore, agencies need to be involved with content creation – or even do it themselves.

SCENARIO 3: MEDIA BUFFET

Highly-Fragmented Consumer Attention / Fixed Or Limited Access To Media) In this scenario, the media is treated with a high degree of mistrust by consumers. These individual will actively hunt for knowledge, but only take small bites of information from multiple sources instead of completely trusting a few. They will use multiple devices to access multiple sources and want to stay in control of what they access. Such consumers are also information and task oriented, using multiple media tools which they deem to be the best for different jobs while cross referencing and gathering multiple opinions.

Evidence:

- Today, large corporations like Loblaw, Intel, US Cellular, are enforcing email-free days
- A 2008 Mindshare survey showed that only 35% of consumers trust the information they read in newspapers.
- The same Mindshare survey indicated that 56% of consumers prefer a large number of TV channels—pointing toward a preference for a wide choice of media.
- Today, Google and MySpace’s OpenSocial APIs are making social networking sites more inter-connectable.
- Companies like Multiverse are providing platforms for rapid user generation of even advanced content like virtual worlds.
- A 2008 Futures Group study found that 80% of consumers say they are “increasingly concerned about people or companies misusing personal data.”

Marketing Challenge:

For media companies to do well in the “Media Buffet” scenario, they must build relationships with consumers to overcome any inherent mistrust. This requires developing a thorough understanding about their target audiences. Media companies must also overcome the technical incompatibilities associated with multiple device access in such a scenario.

Implications for marketers:

- In the “Media Buffet” scenario, marketers need to attract a highly discerning audience by placing great emphasis on the quality of their products and the surrounding content.
- This poses particular challenges for low margin/generic brands as there is less consumer engagement and leeway to spend on their advertising.
- Therefore innovation in products and marketing remain as a key way to get audience attention.

Implications for media owners:

- Media owners, too, will have provide high quality products or consumers will go elsewhere.
- They will need to differentiate themselves by offering leading services or content; portfolio management will become more critical.
- The big players will need to deliver innovation and will need to learn tricks from smaller, niche players in the long tail.

Implications for media agencies:

- Media agencies will need to get even better at helping clients target audiences.
- Agencies will need to work more closely with those creating messages to ensure audience fit and media channel effectiveness.

- Agencies must be able to efficiently translate ideas and/or messages for different audiences and customize content accordingly.

SCENARIO 4: TRADITIONAL NEW MEDIA

Consolidated consumer attention / Fixed or limited access to media. In this scenario, consumer use of media is habitual, functional and relatively stable. Consumers clearly define where they consume different media— for example, a clear break between work or home. Media utility and entertainment are more important than connectivity. Active engagement and consumer trust of media is high, but concentrated on few sources.

Evidence:

- In a 2008 Mindshare study, it was found that although the average number of TV channels available to a US household was 119, the average number frequently viewed channels was only 16. These consumers demonstrate a consolidated and habitual use of a limited number of media sources.
- A study by Efficient Frontier revealed that the top 10 media companies accounted for 56% of the revenue share from the top 100 media companies. Search giant Google accounts for 76% of search spending.

Marketing Challenge:

The key challenge of a media company in this scenario is to become part of its consumers' daily routines. To do this, it has to play a valid role in the big content experiences, provide a seamless online as well as offline experience, and be able to leverage consumer behavioral data.

Implications for marketers:

- Marketers need to better understand where to best earn consumer.
- They also need to develop long-term relationships around clear brand identities with consumers.
- Given the consolidated consumer attention, marketers may need to develop relationships with media owners, as brand equity may be best built through partnerships.
- Marketers should also explore partnerships with new players and new business models which move beyond financial incentives to asset exchange & borrowing equity.

Implications for media owners:

- Media owners must understand the personal “borders” of consumers — where want to be reached and where they do not, and learn how to earn their permission.
- This may require greater investment in maintain audiences

- Media owner brands will need to become synonymous with an area of expertise.

Implications for media agencies:

- Agencies will need to excel at evaluating opportunities for clients by identifying big ticket events to win over the highly selective audience.
- While traditional media still exists, media agencies may wish to go beyond the employment of media in reaching out to consumers through tools like events, participation in special interest groups and CSR work that touch consumers at all aspects of their daily lives.

Five Overall Thoughts

1. Emergence of the ‘Media Moment’

Media has become a fashionable commodity, and the increasing relationship between consumer, content and motivation for engaging with content, will result in high value experiences based on the “media moment”.

2. Managing complexity for simplicity

More channels, and more time and location-based media, will ratchet up the complexity faced by agencies and brands. Companies need to adapt their business models to such digitally-savvy audiences.

3. Adapting the advertising business model

The model of paying content owners for slices of attention will continue to erode. Instead, new payment models will emerge, each with its own metrics. New entrants with new business models are expected to appear.

4. Media owners have to aggregate

The level of content complexity will become too much for single organizations. Larger media operations may have enough material, but may not be sufficient flexibility to respond to consumer demands. The solution is likely to be aggregation, rather than acquisition.

5. Data as a solution – with risks

In this new online advertising environment, consolation for brands and agencies will simply mean that they must now know more about consumers than ever before. In a world where consumers increasingly hold the cards, companies will be punished for any feeling of customer abuse

China & the West

Janet Carmosky

The Black Sky, The Green Dam and The Curse of Control

Any geologist can tell you that Beijing sits on the edge of an advancing desert. Similarly, any weatherman in Beijing can tell you that rainfall often comes with official advance notice. In Louisiana they shore up levees; the Venetians build sea gates. Beijingers seed the clouds to water their deliberately planted, erosion-preventing, sandstorm-slowing, heat-wave cooling trees. Millions of them, circling the northeast like a great wall of leaves and roots, to keep the desert out. The Great Wall of Trees.

In the wee hours of June 16, Beijing got more than rain. Loud sheets of water pounded the pale earth and concrete: a monsoon in the desert. Had the weather engineers overdone it? Then, at

noon, something truly strange happened. The sky went black and it stayed black, until the real night hours made things feel slightly back to normal. The ominous floor-to-ceiling view from Beijing Capital Airport silently explained the cascade of flight cancellations, and silently raised numerous questions.

By the time this goes to press, “darkness at noon” will have sparked not only the voices of Beijingers — variously outraged, concerned, defensive, confused, or accepting — but also the inevitable response of China haters the world over. They will point to the Black Sky Episode, like so many other things, as evidence that China Is Just Plain Evil.

While we’re awaiting that outcry, we can follow the Green Dam mess. It’s not hydropower, it’s software that screens out porn, which pleases Chinese parents of web-addicted kids. But it also screens out things that are not porn. In

addition, it may have some pretty nasty spyware in it. And finally, some of its code may have been stolen. (Rebecca McKinnon has a great piece in *The Wall Street Journal*, June 18, to put it in context.) In any event, and until Beijing backs down — and I predict they will — two things are true: Green Dam software is required pre-loaded on all computers sold in China after July 1, and the China haters are having a field day.

One thing most haters and sinophiles agree upon is that, given where China is right now, in 2009, Beijing can afford to lighten the heavy hand of control. Backing off from Green Dam would be an example of exactly that.

Here’s the point: China’s current leaders are willing to back off. They just aren’t sure how. 25 years of local elections, detailed implementation proposals, and increasingly common public commitments to implement democracy are typical of Chinese process.

Westerners view the PRC’s man-made disasters (The Great Leap Forward, The Cultural Revolution) as proof that the need to control is China’s main problem. But Chinese almost universally point to

“ So, here’s one practical lesson learned: taking metrics of western success and implementing them drastically in China did not work. ”

something else as well: Mao's forcing the pace of change. Further, in both those man-made disasters, Mao rationalized his plans as a means to show the west (Russia, England, and the USA) that China could surpass them. So, here's one practical lesson learned: taking metrics of western success and implementing them drastically in China did not work. Implementing western metrics gradually — incremental adoption of transparency, accountability, engagement, and much greater freedoms over the past 30 years — does.

For me, different perceptions between China and the west always point to one or more of what I call the Nine Key Contrasts. Here's one of them: Westerners see time as linear. The Chinese see time as cyclic. (For those with an ongoing interest in the relationship between China and the West, I lay out these Nine Key Contrasts in "Cracking the Code", which Internationalist Press will publish this fall.)

At the Renaissance, Europeans re-wrote the ancient times, as documented in ancient languages, by extinct civilizations. "Brutality and the struggle for survival are over. We are progressing towards ever more enlightenment." Linear.

The Chinese view? Four millennia of man's own brutality, the struggle against nature, famine and constant war were written in a language that the Chinese still use. It's not the history of some extinct nation. It's the secrets to survival for a people who have persevered for an unbroken 5000 years. Survival is tough so people need to be tougher. Overprotective and self-sacrificing mothers, stern kung fu

masters, demanding PhD advisors — all archetypes of Chinese society. Successes in education, in keeping a family together, in physical and mental training are all possible precisely because of hardness. Being protected or pushed hard is a more consistent recipe for survival, than providing a landscape that is safe. When has life ever been safe for the Chinese? Disaster is around the corner. And if the seeds of instability and chaos lurk on the Internet, we build a dam.

“ When has life ever been safe for the Chinese? Disaster is around the corner. And if the seeds of instability and chaos lurk on the Internet, we build a dam. ”

I'm not Chinese but I understand them, and my mission is to help everyone who needs to do business with China to understand them better. I hope you got something out of this column.

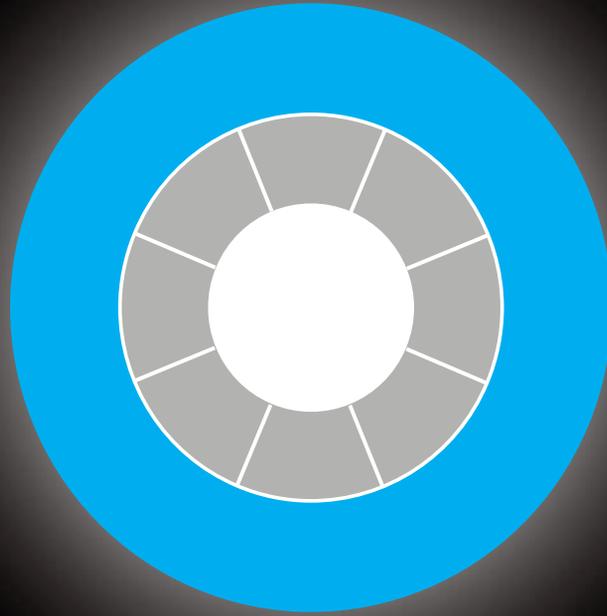
I'll be back next month.



Janet Carmosky is a career China business specialist and one of the leading voices on China business in the US. She has experience in a wide range of industries in China, where she lived and worked- as Janet Zhang — from 1985-2003. In 2008 she co-founded The China Business Network as a platform where corporate executives and professionals in China, the US and beyond, can connect and share expertise, projects and learning both online and offline. Currently CEO and Editor-in-Chief of The China Business Network, she writes and speaks about the cultural and

organizational dynamics that result in missed opportunity for both sides. With near-native fluency in Mandarin and solid Cantonese, she also facilitates board-level communication between Chinese and American organizations.

*Janet has a BA Chinese Studies (U. Pennsylvania 1985) and has worked in senior management for Burson-Marsteller PR (Director, Shanghai); Web Connection/chinadotcom, (Director of Operations, Shanghai); Richina Fashion Retail, (Genl Manager, Shanghai, Beijing, Hong Kong); Richina Capital, (VP, Shanghai); Coopers & Lybrand Strategy Consulting, (Shanghai) and other firms. Her past and current clients include Office Depot, Wella AG, Bacardi, Marriott, Continental Airlines, PR Newswire, Wal*Mart, Corning, Waste Management, Sony, Citroen, Alcatel, Ethicon Endosurgery, Briggs & Stratton, Unilever, Alparma, Givenchy, Yue Sai Kan. Her publications include Alcatel in China: Business as an Adventure (2003) a case for MBA students at Switzerland»s MD and Harvard Business School, as well as articles, essays and chapters in various Economist publications.*



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Punta del Este

January 2 - 15, 2009





Given the new **The Internationalist** partnership with SRDS and its International Media Guide (IMG), a new data page will appear highlight some of IMG's media and market knowledge. IMG, available as both annual directories and as an online resource and search tool, is a critical product for international media planning needs.

Given that China is portrayed in our cover story as the world's most hopeful market, we decided to start this new feature with today's BRIC growth leader.

Top Circulation Newspapers in China

- Canako Xiaoxi (Beijing)*
- People's Daily
- Yangtse Evening Post
- Guangzhou Daily
- Nanfang City News (Guangzhou)
- Yangcheng Evening News
- Chutian Metro Daily (Wuhan)
- Xinmin Evening News (Shanghai)
- Beijing Evening News
- Information Times
- Peninsula City News
- Dahe Newspaper
- Qianjiang Evening News
- Qilu Evening News
- Nanfang Daily
- Today Evening News
- Wuhan Evening News
- Modern Express
- Yanzhao Metro Daily
- Metro Express

* This translates to Reference News, a weekly trade newspaper



China Newspapers by Cities

PAPER	CITY AND PROVINCE	PAPER	CITY AND PROVINCE
Beijing Evening News	Beijing	Hebei Ribao	Shijiazhuang, Hebei
Beijing Ribao	Beijing	Shenyang Daily	Heping, Shenyang
Beijing Wanbao	Beijing	Shenyang Evening Paper	Heping, Shenyang
Beijing Youth Daily	Beijing	Hubei Ribao	Wuchang, Wuhan, Hubei
China Consumer Journal	Beijing	Huizhou Daily	Huizhou, Huizhou
China Daily	Beijing	Yunnan Daily	Kunming, Kunming
China Youth Daily	Beijing	Nanchang Daily	Nanchang, Nanchang
Gongren Ribao	Beijing	Nanchang Evening Paper	Nanchang, Nanchang
International Business Market Daily	Beijing	Bagui City Paper	Nanning, Nanning
Nongmin Ribao	Beijing	Sanya Morning Post	Sanya, Sanya
People's Daily	Beijing	Dazhong Ribao	Jinan, Shandong
Shopping Guide	Beijing	Shantou Daily	Shantou, Shantou
The Economic Observer	Beijing	Chengdu Evening News	Chengdu, Chengdu
Business Newsq	Shanghai	Sichuan Ribao	Sichuan, Chengdu
Jie Fang Ribao	Shanghai	Shanxi Evening Paper	Taiyuan, Taiyuan
News Evening Post	Shanghai	Tianjin Ribao	Tianjin, Tianjin
News Morning Post	Shanghai	Yanzhou Evening Post	Yangzhou, Yangzhou
Shanghai Business News	Shanghai	Spring City Evening News	Kunming, Yunnan
Shanghai Daily	Shanghai	Hangzhou Ribao	Hangzhou, Zhejiang
Shenjiang Service Guide	Shanghai	Zhejiang Ribao	Hangzhou, Zhejiang
Xiamen Evening News	Shanghai	Zhengzhou Evening Post	Zhengzhou, Zhengzhou
Anhui Ribao	Hefei, Anhui		
Chongqing Economic Times	Chongqing, Chongqing		
Fujian Ribao	Fuzhou, Fujian		
Xiamen Ribao	Xiamen, Fujian		
Guangzhou Ribao	Guangzhou, Guangdong		
Nanfang Daily Weekend Edition	Guangzhou, Guangdong		
Nanfang Ribao	Guangdong, Guangdong		
Yangcheng Evening News	Guangzhou, Guangdong		
Guangxi Ribao	Nanning, Guangxi		
Qianjiang Evening Paper	Hangzhou, Hangzhou		
Changjiang Daily	Hankou, Hankou		

QUICK FACTS Top Chinese Cities By Population

Rank	Chinese	Hanyu Pinyin	English	Population
1.	上海	Shànghǎi	Shanghai	18,580,000
2.	北京	Běijīng	Beijing	12,133,000
3.	广州 / 廣州	Guǎngzhōu	Guangzhou	10,045,800
4.	深圳	Shēnzhèn	Shenzhen	8,464,300
5.	东莞 / 東莞	Dōngguǎn	Dongguan	6,864,000
6.	佛山	Fóshān	Foshan	6,740,000
7.	天津	Tiānjīn	Tianjin	5,190,000
8.	武汉 / 武漢	Wúhàn	Wuhan	5,750,000
9.	沈阳 / 瀋陽	Shěnyáng	Shenyang	5,681,000
10.	长春 / 長春	Chángchūn	Changchun	5,566,000
11.	哈尔滨 / 哈爾濱	Hā'ěrbīn	Harbin	5,475,000
12.	成都	Chéngdū	Chengdu	5,293,000
13.	济南 / 濟南	Jīnán	Jinan	4,789,000
14.	重庆 / 重慶	Chóngqìng	Chongqing	4,196,000
15.	江门 / 江門	Jiāngmén	Jiangmen	4,126,400
16.	杭州	Hángzhōu	Hangzhou	3,931,900
17.	南昌	Nánchāng	Nanchang	3,790,000
18.	邯郸 / 邯鄲	Hándān	Handan	3,763,000
19.	贵阳 / 貴陽	Guìyáng	Guiyang	3,450,000
20.	太原 / 太原	Tàiyuán	Taiyuan	3,413,800
21.	南京	Nánjīng	Nanjing	3,375,000
22.	西安	Xī'ān	Xi'an	3,352,000
23.	兰州 / 蘭州	Lánzhōu	Lanzhou	3,200,000
24.	大连 / 大連	Dàlián	Dalian	3,153,000
25.	郑州 / 鄭州	Zhèngzhōu	Zhengzhou	3,153,000
	NOTE:	香港	Hong Kong	7,000,000

Provinces

Provinces (Sheng)	Capital	Provinces (Sheng)	Capital	Metropolitan Areas
Anhui	Hefei	Jiangxi	Nanchang	Beijing — capital
Fujian	Fuzhou	Jilin	Changchun	Shanghai
Gansu	Lanzhou	Liaoning	Shenyang	Tianjin
Guangdong	Guangzhou	Ningxia	Yinchuan	Chongqing
Guizhou	Guiyang	Qinghai	Xining	
Hainan	Haikou	Shaanxi	Xi'an	
Hebei	Shijiazhuang	Shandong	Jinan	
Heilongjiang	Harbin	Shanxi	Taiyuan	
Henan	Zhengzhou	Sichuan	Chengdu	
Hubei	Wuhan	Xinjiang	Ürümqi	
Hunan	Changsha	Yunnan	Kunming	
Jiangsu	Nanjing	Zhejiang	Hangzhou	

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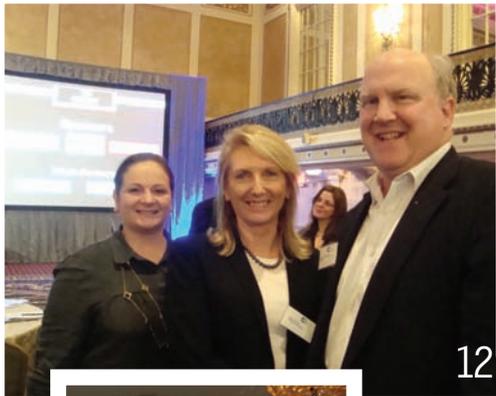
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IAA NY HOSTED 5TH ANNUAL GLOBAL MARKETING SUMMIT

This year's summit featured a starring line-up of speakers from the world of journalism: Newsweek International's Editor, Fareed Zakaria; CNN's Chief International Correspondent, Christiane Amanpour and Forbes CEO, Steve Forbes. Panels included industry leaders discussing such hot topics as: "Engaging the affluent and luxury goods audience in a time of recession," "Using digital to expand your global footprint," and "How to maintain a global brand footprint in a complex world." This year's event chairs were Julie Chan of Johnson & Johnson and Steve Giannetti of National Geographic.

All photo identifications from left:

- 1 *Mike Fox, ESPN and Alex Clemente, The Harvard Business Review.*
- 2 *Panelists June Bower, Cisco and Penry Price, Google.*
- 3 *Russ Stein, Platform A.*
- 4 *Jessica Sibley, BusinessWeek and Panelist Randy Brandoff, Marquis Jet.*
- 5 *Mike Paradiso and Panelist Keith Turco, both CA.*
- 6 *Steve Giannetti, National Geographic and Greg Tobias, American Express.*
- 7 *Jonathan Davies, CNN International; Kate MeVeigh, CNN International; Panelist Helen Clark, Chevron and Erik Fidel, CNN International.*
- 8 *Christiane Amanpour, CNN.*
- 9 *Fareed Zakaria, Newsweek and Julie Chan, Johnson & Johnson.*
- 10 *Michael Monheim and Douglas Cajas of Axel Springer with Panelist Bant Breen, Initiative.*
- 11 *Lynne Kraselsky, ESPN and Max Raven, CNN International.*
- 12 *Virginie Haemmerli, OMD; Dawn Jacobs, Johnson & Johnson and Ben Jankowski, OMD.*
- 13 *Adnan Brankovic, Initiative.*

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THE INTERNATIONAL NEWS MEDIA MEETS IN MIAMI

The 79th Annual INMA World Congress took place May at Miami's Intercontinental Hotel to bring together a global lineup of speakers to explore emerging strategies to grow audience, advertising, and the branding of newspapers and news media companies.

All photo identifications from left:

- 1 Frank Mahlberg, Axel Springer and Jean-Marc Brandenberger, PubliGroupe.
- 2 Howard Moore, Publicitas North America; Owen Anderson, Nikkei America and Laura Siatta, Publicitas North America.
- 3 Earl Wilkinson, INMA and Grace Palacios, Publicitas-Charney Palacios.
- 4 Agustín Edwards, Las Últimas Noticias — Chile.
- 5 Marcelo Benez, Folha de São Paulo — Brazil and Jean-Christophe Francet, PubliGroupe.
- 6 Miguel Bracamontes, Diario de Morelos; Juan Antonio Guterrez, Diarios Modernos — Guatemala and César Badini, SCA-Argentina.
- 7 Rina Morillo, El Nacional — Venezuela; Alejandro Arze, El Mercurio — Chile and Guido Conterno, GDA — Grupo de Diarios Americas.
- 8 Amelie Ferro, Publicitas- Charney Palacios and Alberto Jaramillo, El Universal — Mexico.

Contact our team: Conover Brown, Melissa Worrell, Natalya Meytin, Jeannie Ng, Shirley Wai
conoverbrown@worldmediaonline.com melissaworrell@worldmediaonline.com





an **internationalist** Conference Series

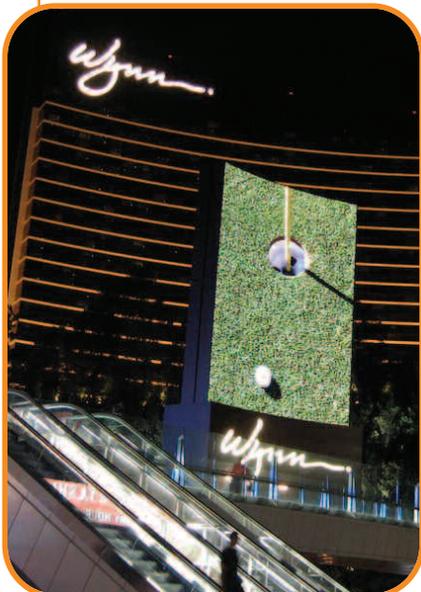
media  **matters**

MEDIA MATTERS LATIN AMERICA LOOKS MORE AT DIGITAL

The Internationalist's **MEDIA MATTERS** series place again in Miami to connect Latin American marketers and encourage them to exchange ideas. Sponsored exclusively by Publicitas- Charney Palacios, the event provided 60 marketers from the region a unique opportunity to discuss the reinvention of brand building in today's changing marketing environment.

All photo identifications from left:

- 1 Deborah Malone of *The Internationalist* moderates a panel with Natasha Marvin of Cisco, Camilo Concha of PHD Network and Paul Suskey of Media 8.
- 2 Joel Bary of Latin Medios.
- 3 Myriam Milgrom, Publicitas-Charney Palacios; Matias Comella, Symantec; Monica Doria Trujillo, Publicitas- Charney Palacios.
- 4 Muriel Sommers, Florida Breast Cancer Coalition Research Foundation and Fernando Cimato, HP.
- 5 Amelie Ferro, Publicitas— Charney Palacios and Paul Suskey of Media 8.
- 6 Glenda Johnson, Bahamas Tourist Office.
- 7 Jairo Arenas, Virtual Communications and Carolina Quinceno, Publicitas- Charney Palacio.
- 8 Fernando Pacheco and Maria Carrasquillo—both of Sunbeam.
- 9 Marta Clark and Federico Gros — both Adobe and Soley Clayton, Publicitas- Charney Pala.
- 10 Ramiro Sosa, Sony; Michael Jones, Mediaedge.cia; David Cepeda, Sony.
- 11 Lynn Kirchenberg, Motorola; Clara Rangel and Pamela Cardova — both COPA Airlines; Javier Camacho, Cisco.



Vegas, Baby

Let's put it this way. If Las Vegas were an American teenager, it would be the pregnant valedictorian: pulling everything off despite the odds.

Arrivals

Start pulling slot machines as soon as you land at McLaren International Airport to go hit bottom before you even hail a cab to the city. It's better that way. Your likely destination is conveniently located on Las Vegas Boulevard, also known as the Strip. Proper downtown Vegas lies to the north, but much of the action is bookended by the **Mandalay Bay** and **THE Hotel** at the south end and the new **Wynn** and **Encore** at the north end of this miracle mile. In between are many globally known properties, from the **Bellagio** and **Venetian** to **Ceasar's Palace**, **New York New York** and the **MGM Grand**.

Your choice of hotel and casino say nothing about you, but they do provide good markers for a visit. Each has a unique flavor and different amenities, but with the large volume of visitors coming through (over 1,000,000 a month in 2008) its hard to feel special. The casinos are a sausage maker, and you're the pig. That said, this guide will take you along the most Hub worthy locations, with some overviews about what to expect at each one.

Mandalay Bay

Shallow Stereotype: Asian, rich
Good for: Weddings at the **Four Seasons**, business meetings not related to AIG
Don't miss: **THE Hotel**, the wing to stay in

Luxor

Shallow Stereotype: Frat kids
Good for: Looking at from a distance
Don't miss: Concerts and live shows with some of the biggest acts out there

Bellagio

Shallow Stereotype: International latin
Good for: Relaxing at the pool, central location
Don't miss: The garden verandah, with revolving art installations

Planet Hollywood

Shallow Stereotype: Party kids in tiny swimsuits
Good for: Cruising for a date
Don't miss: The price, and **Privé** Las Vegas

Ceasar's Palace

Shallow Stereotype: Families of every stripe
Good for: Quick visits, budgets
Don't miss: **The Forum Shops**

Venetian

Shallow Stereotype: Parents of Adult Children
Good for: Business stays, higher end family trips
Don't miss: **The Guggenheim**

Wynn & Encore

Shallow Stereotype: Jetset
Good for: Partying at **Tryst**
Don't miss: Snooty French themes at **La Reve** — a fantastic show

The Palms

Shallow Stereotype: The one over there
Good for: Celebrity spotting at the rooftop bars
Don't miss: Late night and afterhours, **The Palms** is last stop on the local nightlife wagon

Dining

You could hit the various buffets that make Vegas so worth talking about, but the cuisine in the city is really second to none. Steakhouses play to the business and middle America crowd and seem to be similarly good, but **BRAND**, at the **Monte Carlo**, does stand out with patrons. For delicious fine dining, try **Alize** at the top of **The Palms**, an airy, sophisticated venue run by André Rochat, who is near the top of the pecking order among Las Vegas chefs. For the quick bite, try a visit to the monster-sized **In-n-Out Burger**, behind the Strip at 2900 Sahara Avenue. Order the double double with fries and a shake, then feel your arteries clogging in real time.

Nightlife:

Vegas is now about nightlife as much as anything — the best clubs vary by day, but

Tryst at **Wynn**, along with **XS** at **Encore**, seem to be the hot spots du jour. Both are extremely elaborate and beautiful, with thumping sound systems and gorgeous people on display. At **Tryst**, try to request a table (bottle service required) at the edge of the large waterfall that thunders into the space, while at **Encore** the best bet is to angle a cosy spot away from the action. Other spots to check out include the aforementioned **Privé** at **Planet Hollywood**, the neverending pool scene at the **Hard Rock Cafe**, and for those late night moments — **Drai's** — a classic after hours spot that's fun just before the sun rises. After the sun rises, head to the **Palms**, where the fun doesn't stop until noon on some days.

Then, there is always the gambling. The casino experience feels largely similar no matter where you go — lots of lights, sounds, drinks and a complete loss of feeling when it comes to money, time and self respect. At any hour of any day, this environment feels almost exactly the same, with some periods busier than others. We like it at around 7AM, when you can people watch the tourists on their way back to a hotel room, see the early walk of shame shift from hotel rooms, hear some whooping and hollering from the occasional win, and even spot the occasional valedictorian. And maybe, just maybe, win \$5 on black. Or red. Your call.

Stan Stalnaker is the founder and creative director of Hub Culture, a real network merging the virtual and physical. Hub Pavilions are opening worldwide with workspace, online collaboration tools and support services for Hub members. He can be contacted at stan.stalnaker@hubculture.com



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