

DIRECTIONS FOR MEDIA MONEY

Pragmatism
Guides The
Views Of
Orange's
Batchelor

Linda Wolf: Ads Aren't Relevant Or Meaningful To Women

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NEW DIRECTIONS FOR MEDIA MONEY

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The challenge Orange telecom's ALEX BATCHELOR faces: communicating to 52 million customers in 12 diverse markets



Leo Burnett's LINDA WOLF says consumers are tuning out ads that don't present women in realistic and believable ways





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"REINVENT, RESTORE, REBUILD" IS AN ASPIRATIONAL MANTRA FOR ALL

"CAN YOU HEAR ME NOW?"

At a recent speech before a group of advertisers in London, sponsored by the World Federation of Advertisers and the British advertiser group, ISBA, McDonald's Larry Light talked about his company's new version of the "3Rs" (readin', 'riting, and 'rithmetic) as the brand evolves in an era of concern surrounding issues of obesity in children.

The new McDonald's product and marketing direction centers on three basic concepts: reinvent, restore relevance, and rebuild trust. Light calls this platform "leadership marketing" as McDonald's sets new standards for communicating with children and increases its messages about eating right and being more active. Correspondingly, McDonald's product mix will continue to shift to

include more fruit and vegetables, while the company steps up its sponsorship of school fitness programs. Reinvent, restore, and rebuild might be three good concepts to keep in mind for all of us as we slowly emerge from a "not business-as -usual" series of years—whether we are marketing fast food, an airline, financial services, or a media brand. Certainly the world has dramatically changed as have consumers' attitudes, so why would brands remain static and still expect to grow? Those products and services that connect best with customer needs while still acknowledging the sensibilities of the times will be the ones that keep building both confidence and sales. At that same meeting, Stephan Loerke, WFA managing director, cited a 2004 statistic from the U.S. that "78% of marketers find measuring advertising's impact as somewhat/very difficult." Given that discussions of ROI and marketing accountability are of primary concern today, such a figure is astonishing. No doubt, this speaks to the need for new measurement tools as suggested by the WFA. Perhaps, though, this issue can also benefit from Light's new mantra of reinvent, restore, and rebuild. As he ended his speech in his signature, dramatic style, he suggested, "... collaboration, not confrontation. It's not blame; In conversations about the advertising and marketing communications business, we often hear the comment—generally posed as a question—

"Is media the new creative?" We at international ist believe the question should be discussed more broadly, "what is the role of media agencies, media planners, and media consultants?"

Certainly they offer more than just creative ideas, not that creative ideas aren't important. One major argument from media specialists is that they, not traditional advertising agencies, should be the first stop when clients are ready for a communications program. We hear their reasoning in one part of our two-part Cover Story. We also talk to media companies to learn about the new solutions they are offering to help advertisers' messages break through. This is an ongoing and evolving story that we expect to come back to again and again. We welcome all voices and would like to hear your opinion and your solutions too.

Getting through to target audiences with believable and convincing messages is really the ultimate goal. Burnett's Chairman-CEO Linda Wolf tells why she believes advertisers are doing a poor job in reaching women in "Commentary." And Alex Batchelor, the man behind Orange telecom's marketing, talks about the fine line between assuring consistency from one country to the next for the international-minded and getting its message across in a meaningful way to people in markets at such different levels of development.

We on the staff of international ist also spend much time discussing how to get our messages to you in an inviting and readable way. One person whose non-verbal voice is much in evidence is our creative director April Garston. A staff member since the magazine's beginning, April has been instrumental in not only creating our distinctive look but in every issue is challenged to present our ideas in a way that speaks to a mosaic of readers and their interests.



deborah malone PUBLISHER

it's changing the game. CHANGE THE GAME."



nancy s. giges

classic film scene updated to launch newest vw golf model

To introduce the newest Golf GTI model in the U.K., Volkswagen wanted a television commercial that represented the timeless, universal appeal of the brand. After looking at many icons, VW and agency DDB London chose to re-create and update a classic movie scene: Gene Kelly's memorable dance sequence in "Singin' in the Rain." The result was a spot for the Golf GTI Mk V consisting entirely of singing and dancing, which closes with a line that says, "The original, updated." Says Martin Loraine, DDB London creative director, "We thought about the Golf GTI when it came out. There are not many cars that invent a genre, which is what we thought was the most prominent thing about the GTI. It wasn't just a fast car or a nice car; it was an original, which is rare." Agency and client believe the re-creation captures the spirit of the car and its heritage. The spot starts just as the classic clip in the film does as Kelly walks through the rain sodden streets, spinning his umbrella and dancing, but suddenly he is seen flipping into some outrageous break dance moves, certainly not something he performed in 1952. To update the original, three highly accomplished break dancers and body poppers were used to perform phenomenal dance moves. The actors wore exactly the same suits as Kelly did in his scene and had Kelly's face mapped onto their faces using makeup and computer techniques. Catherine Woolfe, Volkswagen communications manager, commented, "The idea behind the commercial is all about the fact that the new Golf GTI is the original Mk I but updated for 2005. The latest Golf is seen as a classic and iconic car, and we really wanted to show that in a very unusual and memorable way. The scene from 'Singin' in the Rain' is a memorable, classic film moment, showing Gene Kelly at his very best," she says. "Volkswagen felt that this moment encapsulates the very essence of Gene and we feel that our latest GTI captures the spirit of the Volkswagen Golf GTI as a stylish and classic car that has, like Gene, stood the test of time."

Loraine notes that Kelly was a true original, "someone who developed his own style and in using him we could demonstrate a lot of the spirit of the car.... [He] represents the car in a lot of ways because he is very energetic, fun, and exuberant." •









production tidbits

- It took a crew of 22 men 14
 days to put together a set for
 the shoot to assure detail as
 close as possible to the original.
- The dancers all underwent three hours of prosthetic makeup, had padding inside their suits, and were wearing wigs to replicate Kelly's look.
- The music is a re-mix of the original musical score giving it a contemporary feel.

brandchannel.com 2004 readers' choice awards*

	GLOBAL	ASIA-PACIFIC	EUROPE/AFRICA	LATIN AMERICA	NORTH AMERICA
1	Apple	Sony	lkea	Cemex	Apple
2	Google	Samsung	Virgin	Согопа	Google
3	lkea	LG	HGM	Bacardi	Target
4	Starbucks	Toyota	Nokia	Bimbo	Starbucks

The spot began running in the U.K. in January and may be

picked up in Australia and Japan.

^{*}Based on votes by 1,984 brandchannel readers from 75 countries.

reality check on young mothers in japan

Today's young mothers in Japan are quite different from their own mothers.

They are proud of being a mother but want to be seen as successful women who have made a choice and retained their individuality. To understand them, McCann Erickson Japan is summarizing research findings about them in "Real Mothers Japan," which will be published twice yearly.

The information in the first report was drawn from several sources, a McCann Erickson survey of women 20+ years old; a "Real Mothers" survey of ages 25–39 with children ages 6 and under; and information from McCann's PULSE research capability.

According to McCann, the trigger to the demands of today's young mothers is driven by a "I want it right now!" attitude. "Not surprising," says McCann, "among mothers who grew up as the 'office ladies' of the 90s." This is opening up many opportunities to marketers, McCann says.



world travelers

The top five international tourist brand destinations for the Japanese are Hawaii, Guam/Saipan, South Korea, Australia, and France, according to a survey conducted by Hakuhodo.

The analysis, which involved 51 tourist destinations, evaluates the strengths of destinations from the perspectives of brand equity. The results are based on a survey of 1,000 individuals: 600 in metropolitan Tokyo and 400 in the Kansai region. Respondents were asked about their perception of the 51 destinations.

The survey was conducted

for the Hakuhodo Tourist Business Development Project, a group formed in 2003 to help boost the tourism industry, especially in-bound tourism. The others in the top 10 in order were: Italy, Canada, Hong Kong, U.K., and New York.

Among other findings:

- Hawaii is outstandingly popular among both men and women and ranked first in the overall ranking and also by all people in all generations.
- South Korea ranks within the top five in the overall ranking by each generation and is selected by a much broader generation than other

easily-visited Asian destinations.

- Switzerland is popular among middle-aged and older people. Although not ranked by younger generations, Switzerland is placed in the top 10 by men and women aged 50 and over.
- Canada is ranked second by women in their 50s. Canada and Switzerland are popular due to a mountaineering book among the middleaged, who choose destinations with mountains and rich nature.
- Las Vegas is ranked within the top 10 by young people. Although not placed within the top 10 in the overall ranking, Las Vegas is ranked

tenth by both men and women under 30, presumably as a place to obtain a glamorous experience at casinos and other spots not available in Japan.

Respondents were asked to choose their destinations by travel companion and purpose. New York is the No. 1 choice for travel by oneself, Hawaii for travel with spouses or boyfriends/girlfriends, and South Korea for travel with friends or in a group. As a destination for enjoying oneself economically, South Korea is the No. 1 choice; for having fun spending money, Las Vegas comes out on top. •

TOP TOURIST DESTINATIONS FOR JAPANESE

I R	A V	Ł	L	С	0	М	Р	A	N	1	0	N
	ALONE			PARTI	IER			GRO	UP			
¥ 1	New \	ork/		Hawai	i			Sou	th	Kor	ea	
A 1 X 2 X 1	U.K.			Franc	ce			Haw	aii			
3	Franc	e		Italy	/			Las	Vе	gas		
4	Italy	′		Austr	rali	a		Hon	g K	ong		
5	India	1		Switz	zerl	and		Gua	m/S	aipa	an	

T R A V E L	B U D G E T
LOW	HIGH
South Korea	Las Vegas 1 🚜
Guam/Saipan	Las Vegas 1 7 2 7 2 7 2 7 2 7 2 7 2 7 2 7 2 7 2 7
Thailand	Italy 3
Taiwan	Hawaii 4
Hong Kong	New York 5

FRONTLINES

japan to investigate communication industry's practices

Japan's Fair Trade Commission has started a far-reaching inquiry into the communication industry's business practices.

A Jan. 30 letter to chief executives from Akihito Watanabe, manager of the FTC's Trade Practices Department in the Economics Affairs Bureau, said in part: "... [In other investigations] we have found that in the advertising transactions between the advertiser, agency, and media there was room for improvement for assuring fair trade such as the status of documenting contracts. ... We have decided to survey mainly the trade involving advertisers and media companies to identify the actual conditions of the market structure and the trade practices of the advertising industry with regard to the antitrust law and competition policy."

The investigation will cover both transactions between agencies and their clients and between agencies and media companies. A published report is expected this August. The study stems partly from an investigation last year into the relations between agencies and their sub-contractors.

Pressure from some advertisers demanding greater transparency in their dealings with agencies was also a factor. In 2003, the Japan Association of Advertisers published a report, calling for greater transparency. The recommendations had little impact. According to one executive familiar with the inquiry, the FTC wishes to explore whether large agencies and advertisers use their buying power to unfairly squeeze smaller companies and collaborate in secretive pricing or discount mechanisms. Since foreign advertising agencies and advertisers are largely among the smaller players, the inquiry probes sensitive topics. • —David Kilburn

more regulations and reports

- The European Association of Communications Agencies has published a code of ethics for agencies in EUROPE. The code, supported by the Institute for Communications Ethics, is intended to provide practical guidelines for dealing with complex ethical issues and to give clients a clearer idea of what they can expect from agencies. The EACA ethics program is also expected to help agencies respond to increasing European Union scrutiny of self-regulated industries; to encourage best practices for the management of ethical issues; and to establish advertising practitioners as a key group providing advice on social and ethical issues.
- THE CZECH GOVERNMENT has proposed a 3% tax on TV commercials. It is estimated that the tax would generate about €10 million a year. Proceeds would go to the Czech Fund for Cinematography to help finance the production of locally made films. Advertising trade groups argue that it will harm commercial communications and violate the liberal principles of the EU. The Ministry of Culture claims that the tax is justifiable under EU rules. The measure has been approved by thegovernment. It is expected to be the focus of fierce debate in Parliament. •

a humorous approach to encourage i-mode use

To encourage trial of i-mode data services among younger mobile phone users, FarEastone and agency Ogilvy & Mather Taiwan created a series of light-hearted spots showing that the technology is cool and fun. In the commercials, people realize how much better off they would have been had they used i-mode. In this spot, a poignant moment fulfilling a dearly departed loved one's wishes to have ashes scattered at the beach is ruined by a sudden gust of wind. If only they'd checked the weather forecast on i-mode.... •







F R O N T L I N E 5

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LOCAL CURRENCY
UNLESS OTHERWISE STATED

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MARCH 17 2ND EUROPEAN HDTV SUMMIT

PLACE: The British Academy of Film & Television Arts, London RESERVATIONS: 44-1923-690636; register@tvconferences.com PRICE: £583.97 including VAT

MARCH 17–18 FIPP AD SALES WORKSHOP INTERNATIONAL FEDERATION OF THE PERIODICAL PRESS AND POLISH CHAMBER OF PRESS PUBLISHERS

PLACE: Kyriad Prestige Hotel, Warsaw RESERVATIONS: Rachel Adams, rachel@fipp.com; 44-(0)20-7404-4169

> PRICE: FIPP member €450; non-member €490

MARCH 23 ASSOCIATION OF NATIONAL ADVERTISING 2005 TELEVISION ADVERTISING FORUM

PLACE: Grand Hyatt Hotel, New York RESERVATIONS: Joanne Forbes 1-212-455-8086 or jforbes@ana.net PRICE: ANA member US\$595; non-member US\$750

APRIL 20 GLOBAL MARKETING SUMMIT NEW YORK CHAPTER OF THE INTERNATIONAL ADVERTISING ASSOCIATION

PLACE: The Princeton Club RESERVATIONS: Jill Henry 1-212-338-0222; director@iaany.org PRICE: Member U\$\$300; non-member U\$\$450

Submit your events to editorial@inter-national-ist.com









an asian touch to a european launch

Lever Fabergé introduces its new Lynx Unlimited fragrance across Europe with a commercial inspired by cult Asian movies. The creative is by Bartle Bogle Hegarty, media by Initiative. The spot opens on the banks of a river in mythical ancient China. The Lynx girl, sitting by a babbling river, is approached by the Lynx hero, who presents her with a bunch of flowers. Alternating between acceptance and rejection throughout the spot, she promptly fires each flower back at him and bolts across a rickety wooden bridge. He chases her running upside down under the bridge. Just when she thinks she has shaken him, he jumps onto the bridge and surprises her.

However, she escapes again by zooming into the air over his head. Determined not to give up, he continues the chase. In a scene spoofing the famous sequence in "Crouching Tiger, Hidden Dragon," they sprint across roofs of traditional dwellings before floating down to a courtyard for their final confrontation. It looks like the Lynx hero has finally won her over, but she lunges through the air. He pulls out his trump card, ripping off his shirt, and causing a cloud of Lynx Unlimited to emerge from his body. As she inhales and is overcome, she floats ethereally into the air, where he floats to meet her for an embrace.

the new niche world

While the move toward a niche society may not be new, www.trendwatching.com says success in the future will come from servicing the new niches and dubs the trend: nouveau niche.

What's driving this trend? According to trendwatching.com:

- Consumers are more individualized and more experienced than ever.
- The combination of online transparency of supply, prices, recommendations, and opinions plus nearly one billion online users results in connecting insanely segmented supply with equally fragmented nouveau niche demand.
- New production processes, mass distribution, technologies, and communication channels, enabling global economies of scale and scope, allow for virtually everything to be made and broadcast, at whatever specification, and whatever batch size.
- New producers, including ordinary consumers, are adding massive amounts of niche content in text, audio, and video. •

<u>FRONTLINES</u>

APRIL 21–22 CREATIVITY WITH CONSUMERS/ CUSTOMERS/EXPERTS SYNECTICS CREATIVITY WORKSHOP

PLACE: London
RESERVATIONS:

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rneill@synecticsworld.com; 44-207-616-9797 PRICE: £1,450 plus VAT

MAY 10–13 IQPC'S 12TH ANNUAL KID POWER CONFERENCE & AWARDS

PLACE: Disney Yacht & Beach Club, Orlando

RESERVATIONS:

www.kidpowerx.com

or 1-800-882-8684 PRICE: Various

MAY 19–20 BREAKTHROUGH CREATIVITY SYNECTICS CREATIVITY WORKSHOP

PLACE: London

RESERVATIONS:

rneill@synecticsworld.com; 44-207-616-9797

PRICE: £1,350 plus VAT

MAY 22–25 35TH FIPP WORLD MAGAZINE CONGRESS

> PLACE: Waldorf Astoria Hotel, New York

RESERVATIONS:

www.magazine.org/NYC2005FIPP

or Helen Bland

helen@fipp.com

PRICE: FIPP member \$2,500; non-member \$2,750

JUNE 16–17 FACILITATION AND LEADERSHIP SYNECTICS CREATIVITY WORKSHOP

PLACE: London

RESERVATIONS: rneill@synecticsworld.com;

44-207-616-9797

PRICE: £1,450 plus VAT

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china—where TV reigns supreme

While the declining power of television as an advertising medium is a recurring story in many parts of the world, in others TV reigns supreme. In areas bordering Myanmar and Vietnam, for example, the humblest dwellings, shops, and restaurants always have two electric appliances—a light bulb and a television set that stays on when anyone is in the room, reports Asia correspondent David Kilburn after traveling in these regions. "Even settlements so remote that they did not even have telephone connections had satellite TV. Outside the largest towns, I never saw a newspaper, magazine, or even an outdoor board or cinema. TV was the sole medium for entertainment, news, and information."

Much building of the transportation infrastructure is underway that will make these areas much less remote physically as well as via television. This is attracting many major multinationals, which are very bullish about business prospects in the region.

As for ad spending, ZenithOptimedia predicts that China is on course to become the third largest advertising market by 2011. The market is estimated at US\$9 billion today and is expected to grow to US\$12 billion in 2006 and US\$18 billion by 2011.





vid Kilbur

more signs of advertising in north korea

According to a report in the Korea Times, a North Korean newspaper Pyongyang Shinmun recently began to run commercial ads for the first time. The development was unexpected and is believed to be a test. Ads have been criticized in the communist country as a symbol of capitalism. Prof. Chin Hee-gwan of Sogang University's Institute of Social Science in Seoul told the Korea Times: "If the experiment turns out to be successful, I guess people in the North will see advertisements appearing even in the [North's largest newspaper] Rodong Shinmun," published by the ruling Workers' Party. The North's economic reform since July 2002 has caused inflation of up to 1,000% in the price of rice, pressuring the development of private businesses to avoid starvation, according to the report. A year ago outdoor boards that seemed to cross the line from being strictly political statements were noted in Pyongyang (inter national ist, issue 8).

new 'best idea' award in euro effie

EACA Euro Effie is adding a new award category this year, the Yahoo! Best Idea Award, which recognizes the company, team, or individual who displays the most innovative thinking, whether for a strategic, media, or planning idea. Deadline for 2005 is March 31 for campaigns that ran Jan. 1-Dec. 31, 2004.

These are familiar media money:where is it going

topics of discussion and debate in this era of a shifting media landscape. Is money really flowing away from traditional media into new media as is so often asserted? Where are advertisers spending their precious budgets so that their messages get through to distracted and often hard-to-reach audiences? Is this occurring because of the rise of media agencies as the supreme strategist? inter national ist examines some of the latest thinking of industry professionals.



and who is calling the shots?

inter national ist

the case for media agencies at the helm

The forces that spurred a revolution in mediaplanning land continue to roil. Traditional structures keep on crumbling, signaling new directions in the way the business of advertising and marketing is conducted—and who's calling the shots.

It turns out that unbundling may simply have been the first phase in a series of sea-changing events. As such, media planners as they have been known may be turning into an endangered species.

New consumer behavior patterns, new technology, and new strategies to keep up with both are driving a trend that is forcing media

continued on page 18

"Print is dead."

"Television is dead."

"Media companies are losing business to non-traditional communications vehicles."

When these kinds of comments are expressed at industry gatherings and in published articles, listeners and readers often nod in agreement. But have a longer discussion with colleagues, and the story isn't so clear-cut.

In fact, some research shows advertising in traditional media holding its own while other research shows non-traditional communications methods gaining ground. And there is anecdotal evidence to support each premise.

traditional media companies are holding their own

traditional media companies are holding their own

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"You [can] find evidence of incremental migration from traditional media to direct marketing, research, PR, and so on," says Adam Smith, head of knowledge management, ZenithOptimedia, but when numbers are viewed in different ways, the conclusions could be different, he says.

In a presentation in December, Steve King, ZenithOptimedia chief executive, noted that while the outlook for media spending is



CNBC Europe's Liz Jones says you rarely get a client looking just to buy "spots and dots" any more.

positive, there is growing competition from other areas, particularly the more measurable and accountable direct interactive marketing sector. "Much of TV's success has been built on its strength as the

brand-building medium. Today this is no longer enough," according to King's end-of-year presentation.

He maintains that media advertising is losing share of the total marketing budget to other areas of marketing expenditure and supports that with data, showing media ad spending growth over the past four years was just 1% compared to sales promotion (up 4%), brand PR and sponsorship (up 7%), direct mail (up 5%), and interactive marketing (up 30%).

But in ZenithOptimedia's December 2004 ad expenditure forecast,

media advertising as a percentage of total marketing in 2000 was 46.7%, declining to 44.8% in 2003 but rising again since then to reach a projected 45.8% in 2007.

Numbers from RECMA present yet another picture. Regarding the U.S. market, the share is 90% in traditional media and 10% in diversified services calculated on the basis of billings," says Eudes J. Delafon, RECMA founder & researcherin-chief. If calculated on the basis of income, or revenue, the share could be estimated at 20% for diversified services because the compensation for new activities is higher than for the traditional media, he says.

Execs in all parts of the world are seeing similar trends. Says Mark Patterson, CEO, MindShare, North Asia, "When you look at the profile of media being used by clients these days, the global trends are just as prevalent in Asia as in other parts of the world: a decline in TV viewing, particularly terrestrial TV, decline in newspaper readership, and continued growth and diversity in a whole range of out-of-home and digital media."

The reasons are the same, he says: "what I call the 'shun' words: fragmentation, digitalization, globalization, inflation are apparent in every market here." All have an impact.

Regardless of the trends, media strategists have their work cut out for them as they sift through a complex web of choices and identify the more effective ones, client by client, campaign by campaign.

Meanwhile, media companies aren't standing idly by. If several recent global deals are any indication, media companies are figuring out how to stem the flow of money away from their properties by capitalizing on the brand strengths created by their own traditional offerings. Some of the new opportunities are new twists on old platforms, while others, such as the Web and online components, capitalize on new technology. Branded content, sponsorship, and most important integrated packages that touch audiences in different ways surrounding people with advertisers' messages are becoming much more prevalent.

In an era of personal video recorders and TIVO that are "great

inventions for us as consumers, professionally it doesn't bode well if someone can edit out the ads that we are working so hard to create and to broadcast," says Liz Jones, VP-director of sales, CNBC Europe.

That's why branded content is of such great interest, she adds. "If you can find the right content in which to imbed a message, it has a higher chance of cutthrough in the short term."

Olivier de Montchenu, EuroNews' commercial & distribution director, agrees there are significant changes in the ways advertisers are reaching audiences. "We are selling more and more



McDonald's global partnership with MTV gives it much more than commercials on the network. It enables the fast food restaurant "to play a more relevant and credible role in the lives of young adults," says Larry Light, McDonald's executive VP-global chief marketing officer.





Shell's association with EuroNews'
"Comment" program is an example of the type
of tailor-made solutions being created by
media for advertisers. The integrated package
encourages audience participation and
has broadcast, print, and online elements.

online participation. More and more advertisers are interested in doing something additional on the Web," he says.

By the end of this year, some 20% of the network's business is expected to be in "non-spot" buys compared to the year 2000 when sponsorship just started to become important for EuroNews. "If we pass 20% or 25%, it's more than significant," he says.

Comments Jones, "You very rarely get a client that comes to pan-regional advertising just to buy spots and dots. ... The reason

"We've worked closely with our media partners to develop an integrated campaign that creates new space for engagement with stakeholders."

they are buying pan-regional is for the flexibility and the fact that they can do fully integrated communications plans." Some 90% of her network's media deals this year incorporate integrated elements, she says.

Randy Kilgore, senior VP-advertising, Dow Jones Online Network, says when he talks to advertisers, the conversation always includes how using *The Wall Street Journal* Online should be part of the overall *Wall Street Journal* strategy. And a growing number of advertisers are signing up for global buys. According to a company fact sheet, in 2003, the latest year available, display advertising on the

online sites was up 33%. While technology and financial services marketers remain the biggest categories, travel, automotive, and luxury goods marketers are gaining ground. "Cartier is one of our top ten advertisers online in the first quarter, and we have two travel accounts in the top ten," he says.

And the interest is decidedly global and for global buys even though very targeted online buys are available. "We get something like 15% of our [online] advertising revenue from outside the U.S. so there are quite a few multinational companies buying globally," Kilgore says.

Now, online is even old hat for some. "We have new new media," Kilgore says. "We're growing up." *The Journal* continues to expand the ways it reaches its audience, including a mobile edition of *The Wall Street Journal* for cell phones and also for Blackberry.

"It's not just about a 30-second ad or a page in a magazine," says Humphry Rolleston, director of marketing & research for *The Economist*. "Clients want totally integrated seamless solutions that take advantage of your brand. They want to have a relationship with their audience," he adds.

Recent multinational campaigns from Shell International, Hewlett-Packard, and McDonald's, are just a few examples of the kinds of relationships advertisers are seeking with media companies, incorporating elements that go beyond the traditional purchase of television spots and print ads.

Shell has recently launched two separate efforts that are part of a corporate communications program in which advertising is only one component of an integrated program, but the bulk of the spending is with traditional media companies. Shell has a stated aim of adding to traditional advertising. "We've worked closely with our media partners to develop an integrated campaign that creates new space for engagement with stakeholders," says Judy Everett, Shell's corporate identity advertising manager.

One is a collaboration with CNBC Europe and *The Wall Street Journal* that includes broadcast, print, and online. Shell is a

major advertiser on CNBC Europe's new "Questions for the Future" series of one-hour programs focusing on trends in global business. The programs that use a roundtable discussion format with invited guests cover economic and business issues and geopolitical trends.

Coinciding with the

"Online has been considered new, and now we have new new media," says Randy Kilgore, senior VP-advertising, Dow Jones Online Network.



television are a series of advertising sections in *The Wall Street Journal Europe* and *The Asian Wall Street Journal* featuring articles on the same topics. Readers are also directed to a special microsite where they can join online debates and e-mail comments.

In a statement, the company said these media platforms were selected because of their ability to reach a unique audience of business leaders and key influencers around the world.

The other effort is also a combination of broadcast, print, and online launched in association with EuroNews and European Voice, a weekly newspaper published by The Economist Group. A new EuroNews mini-program (30-60 seconds), called "Comment," is sponsored by Shell on-air with 6-second ids in seven languages. "Comment" encourages viewers to express their comments at a dedicated Web forum.

Other elements of the program include traditional length spots supporting the program. The partnership represents

the kind of tailor-made solutions EuroNews develops with advertisers, de Montchenu says.

McDonald's has linked up with MTV Networks to support a new global showcase "MTV Advance Warning," which introduces emerging artists to young adults. In addition to reaching nearly

> 400 million homes in 162 countries, the sponsorship gives McDonald's high visibility at events and on a special microsite.

Similarly, Hewlett-Packard gets visibility on a special Web page as part of its sponsorship package of a new CNBC Europe series of weekly programs addressing the challenges companies face in today's fast-paced business environment and the innovative solutions enabling companies to embrace change.

Jones believes that in the shorter term, it's these kinds

of packages—ones involving program development, funded sponsorship, and new program formats—that offer the larger opportunities. Mobile applications, while developing, will be longer in coming especially as revenue streams for media companies.

"It's all about the right idea," she says, "the right distribution and then looking at how you evaluate it." It has to be more than just a campaign and a bit more personal, she says. •



"We are selling more and more online participation," says Olivier de Montchenu, commercial & distribution director, EuroNews.



Hewlett-Packard sees its sponsorship of CNBC Europe's "Adapting to Change" as an opportunity to build an association between HP and the concept of positive change, says Daniel Gates, HP-EMEA director of brand marketing.

the case for media agencies

agencies to evolve and take a stronger strategic leadership role. The new direction is simple in the mind of Olivier Gauthier, international senior associate of RECMA, who in a speech delivered in February, declared, "Advertisers should place media agencies upstream from creative agencies."

In today's restructured world of unbundling unraveled, media consultants are taking the helm, claiming for themselves what John Harlow, partner in London's cutting edge media agency Naked, calls "an innovative upstream role."

"Many global clients are giving us the brief before they give it to any other agency. We are execution neutral, and we recognize that advertising-led solutions may not always be correct," says Harlow.

The way consumers receive product information has changed quite dramatically in the past ten years and with it the role of media planners in helping clients determine the best way to reach a target audience. It may sound blasphemous, say industry experts, but the most effective way to reach an audience may now be through public relations, direct marketing, online, or even through handouts in a shopping mall, all disciplines within marketing that have been poor stepchildren to the glitz and glamour of electronic advertising.

Gauthier notes that Procter & Gamble conducted a review of its \$4 billion media planning account in the U.S., with the aim of distributing spending across new media types.

Among the contenders, besides SMG, MediaCom, Carat, and MPG, there was the independent Targetcast, which promises to "deliver superior strategic planning and thinking," notes Gauthier.

"Once this essential piece of strategy was completed, the marketer can then deliver its brief to each category implementation agencies such as the creative agency, interactive agency, promotion agency, PR agency, etc. with full coordination between these

Every Coke can, bottle, and truck is a point of contact with the consumer, which is real estate much greater than most media owners can comprehend, former Coke president-COO Steve Heyer said in a ground-breaking speech.





suppliers," explains media researcher Gauthier.

"When brands are purely advertising, they're not connecting properly," adds Harlow.

With the rapid-fire whims of consumers making marketing increasingly difficult, the days of advertising-exclusive marketing are over, the media expert maintains.

A recent survey from New York's Media Kitchen supports the contention. "The U.S. is one of the weakest TV markets in the

world because of the clutter," says Media Kitchen's CEO Paul Woolmington, who also likes to call himself the Head Chef.

Media Kitchen consumer research shows:

- 80% of Americans are multi-tasking while watching TV, may of them on the Internet
- 51% are remote surfers
- 32% leave the room when commercials air
- And of those with PVR capability, 71% record shows and 47% fast forward through commercials.

"Increasingly, it has become clear that people really don't like commercials. The remote is the most powerful zapping tool available to consumers and they're using it," says Woolmington.

These numbers suggest that advertising as it has been known has got to change, and it has changed, at least in the European market. European agencies are years ahead of the U.S. in recognizing the paradigm shift, says Woolmington.

"The U.S. marketing industry

is woefully inadequate at meeting the challenges of the future and because of the model of over-silo-ing that was created several generations ago, the more powerful people in the media industry have been traders and buyers, not planners," asserts Woolmington.

Harlow agrees, comparing existing agency structures linked to advertising agencies to black-and white-television.

The incredible pace of change being demanded by savvy

consumers is "exponentially accelerating," says Woolmington, driving a revolution in media planning and strategizing.

There's a new definition of media consulting: "It's anything that can carry a relevant message and impact the consumer," says Woolmington. "There has to be a revolution in the way we understand consumers and understand what points of contact impact them in their daily

lives-when they're receptive and

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The new definition of media consulting is "anything that can carry a relevant message and impact the consumer," says Paul Woolmington, head chef, The Media Kitchen.

Steve Heyer, CEO of Starwood Hotels & Resorts Worldwide, put his finger precisely on the trend when as president-COO of Coca-Cola, he delivered what Woolmington calls a seminal speech.

"He extrapolated the number of Coke cans and bottles all over the world, the number of Coke trucks driving around streets of every city. He said that every can, bottle, and truck is a point of contact,

and this is real estate much greater than most media owners can comprehend," explains Woolmington.

Woolmington speaks admiringly of Burger King's "Have It Your Way Chicken" campaign which featured an online animated chicken that one could put through a series of increasingly absurd paces to underscore the "have it your way" tag line at a cost of less than \$50,000.

the context in which they receive contact," he adds.

The campaign generated 13.9 million unique visitors to the Burger King website since it went live in April 2004, according to Crispin, Porter + Bogusky, the Miami agency that created it.

"Brilliant!" expounds Woolmington. "It cost almost nothing to

produce and generated tens of millions of dollars worth of exposure."

So can an agency stay afloat on such paltry money outlays?

Gauthier says: "Generally the split in remuneration between media and creative services is 1/4–3/4 (i.e. 3% for media, 9% for creative)."

However, he notes that although media agencies work with low remuneration fees, they have a higher profit rate than creative agencies. That is because of (1) incentives based on quantitative or qualitative measures; (2) the extension of services in non-traditional media generating higher fees; and (3) less than full transparency on the invoicing between media owners, media agencies, and advertisers in some countries.

"It's not a question of money, it's a question of having a great idea, and we get paid for the idea," explains Woolmington, suggesting a flat fee structure works best in these situations.

The New Deal in media consulting revolves around doing the communications planning first and then determining the channels. Harlow says his large global clients now frequently place Naked at the top of the pyramid, strategizing with them long before approaching advertising agencies.

In the times of the Old Deal, the advertising agency was often the first port of call for a client. "It was not media neutral.

Advertising was the driving discipline, and that is far too simplistic for today's market," says Woolmington.

Gauthier suggests the market will be led by media agencies acting as strategists in tandem with blue chip advertisers and media owners.

A new breed of superplanner is helping clients decide the mix to get the message where they want it to be.

"There is a perceived hierarchy

among marketing disciplines. PR, media, everyone thinks they are more important than the others," explains Woolmington.

"Some disciplines, like direct marketing, are considered inferior. That is absolute poppycock. Everyone is equal, and, depending on

> the client, direct marketing could be exponentially more important," he maintains.

> The new message: the customer is at the center of every transaction, and it is the customer who decides what the channel should be.

Instead of finding the challenge of reaching today's consumer a daunting task, the new breed of superplanner is exhilarated by the task. "Never before have we had a more exciting

Burger King's online "Have It Your Way Chicken" campaign thas generated 14 million unique visitors at a cost of less than \$50,000.

opportunity to redefine how we go to market," says Woolmington.

How does today's media agency respond to the changing climate? Unbundle. Un-silo. Bring in multi-disciplinary teams. Bring in great researchers. Think outside the box that Woolmington says was born of "arrogance created by circa 1950s thinking that ad guys were king." Times have changed.

Both Naked and Media Kitchen are definitely unbundled. They're proud of their multi-disciplinary teams and their lack of dependence on any other agency.

Both know their strengths. Harlow likes to think of Naked as the "glue" between agencies and execution. Woolmington says he wants Media Kitchen to be known for its ability to "put the consumer at the center of the universe."

Many media agencies still see themselves as buyers, and many are still beholden to parent companies from which they "unbundled" in the past couple of decades.

Harlow and Woolmington think subscribing to the concept of media agencies as prime strategizers is essential to future success for advertisers in an incredibly competitive world.

"Agencies not embracing that concept will be left behind in the next three, four, or five years," Woolmington concludes.



Media agencies are taking an "innovative upstream role" in the communications process, asserts

John Harlow, partner in Naked.

alex batchelor

Orange follows a path of pragmatism in determining how it communicates to 52 million customers in 12 diverse markets

Ten years ago, as Alex Batchelor was leaving behind number crunching and marketing jobs at Unilever to become a planner at Saatchi & Saatchi, some planning going on elsewhere in London would play a big role in his future.

Back then, a team from Hutchison Microtel set out to launch the "most personal telecommunications company in the world." They wanted to create a company that people would engage with on an emotional level as well as deliver tangible benefits. And they wanted a name that would reflect the kind of company it would be. They considered many unlikely names—Pecan, Gemini, Egg, and Miro among them—but the one deemed most representative of the brand's concept including connotations of fun, optimism, liveliness, and freedom was Orange.

So in April 1994, Orange entered the telecommunications business in the U.K.

Meanwhile, Batchelor was earning his stripes at Saatchi and went on to spend five years at the branding consultancy Interbrand as brand valuation director.

By 2002, Orange was ready to expand beyond its initial three markets, and Batchelor was ready for a new challenge. He was brought in as VP-worldwide brand to help the brand grow and mature while still retaining its freshness all across the world.

Since he joined, another dozen countries have become part of the Orange world, mainly through re-branding of local services already in existence. Today, Orange does business in diverse markets across Europe, Africa, Asia, and the Caribbean, providing a broad range of voice and data communication services to over 52 million customers. Now owned by France Telecom Group, the company operates as the mobile arm of France Telecom, and says it ended 2004 as the mobile leader in France and the U.K. and ranked No. 1 or No. 2 in 10 other countries.

The challenge Batchelor faces is to develop

and manage a single brand that delivers different levels of service in different countries. Some get only core services while others get added value.

"Cameroon is at a different stage of technical development and market penetration than France or the U.K.," he says. "If in France we are getting excited about video calling and TV on your mobile, it will be some years before that's the same in Cameroon."

Yet, in terms of what the brand stands for, everyone agrees that has to be the same everywhere, he says.

"We have to be realistic about what we do and don't do," Batchelor says. "We mustn't delude ourselves into thinking that we are engaged in some kind of global battle against Vodafone or T-Mobile orVerizon or China Mobile because we

are actually fighting in each and every market."

The competition may be entirely different, he says. "We shouldn't kid ourselves that the Romanian customer is doing anything other than choosing us in a competitive context set by the country in which they buy in. Some of us are lucky enough to travel around and fly to other places but [that's not] the bulk of our customers. It's a national battle with national regulators,

national environments," Batchelor says.

The communications reflect that by having messages tailored to each market and created by "the best agency" in each market. Batchelor describes the communications as a process in development that ideally can be more coordinated at some point in the future.

Alex Batchelor says it's easy to talk about the theory of global and local, but the best solutions have to involve practical delivery.



transitania—the locale of orange's international audience

Although not the majority of its customers, people in transit across national borders are a very valuable segment for Orange.

And the telecom company recognizes that it needs common and consistent communications for this audience in airports, railway stations. and in international magazines.

"We need to treat these people differently because they are the ones who are going to notice any inconsistencies in what you choose to say in London, France, or Bucharest or wherever else they might be," says Orange VP-Worldwide Brand Alex Batchelor.

A single campaign overlays advertising and communications programs that are created within each market.

For traveling customers, "we need to ensure [they] are never confused by Orange wherever they come across us." Batchelor says.

A recent campaign, created by Mother in London and placed by MPG, was aimed at building credibility and brand recognition in Transitania with some very specific objectives:

- Increase the use of voice and text among traveling Orange customers;
- Lift Orange advertising above the mêlée of corporate messages in this space:
- Have personal and situation relevance:
- Build positive brand associations through customer insight and recognition;
- Drive usage.

The message resonates especially with people away from home and on the go:
Simple copy says: "Tell your kids a bedtime story, whatever time zone you're in."

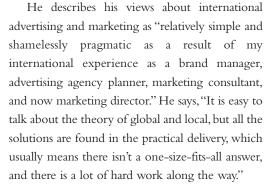
A line next to the logo urges, "Make a call," and a separate message positions the company

with the line: "The future's bright, the future's Orange."

Savs Batchelor: "The messages are relevant to all

orange customers who may see them." $\,$

Orange also uses its agency in France BETC Euro RSCG to create Transitania ads, which are assigned on a project basis to either Mother or BETC Euro RSCG.



He says that Orange works very hard to make sure the look and feel are as consistent as possible and that all use the same logo and identity system, but he is quite aware that succeeding locally may mean different approaches in different markets.

"Sometimes that requires you to appeal strongly to Slovaks in a Slovakian way rather than give them something that doesn't necessarily work," he says.

Having said that, however, he explains that some advertising has been shared. "We have used communications from Israel in other countries, from the U.K. in the Netherlands, but we haven't sat down and said we are going to produce centrally. As the technological development grows, those things will happen naturally." One exception is for the "Transitania" audience

(see related story at left).

What is common at this point is that Orange is a "relationship" brand. "We try to focus on service and therefore the relationship side and differentiation across our territories. It doesn't mean we don't talk about price or product; but usually in the context where we can of the relationship," Batchelor says.

For example, in some countries Orange offers a

package in which customers are automatically charged at the lowest rate based on the number of minutes they use each month rather than having to choose a plan offering a maximum number of minutes that they might exceed or not use.

While the advertising may say customers always get the cheapest rate, he says it's positioned as about the relationship and the kind of





Focusing on basic services in

Cameroon, this spot by a local

agency called Nelson uses a simple

demonstration with children and

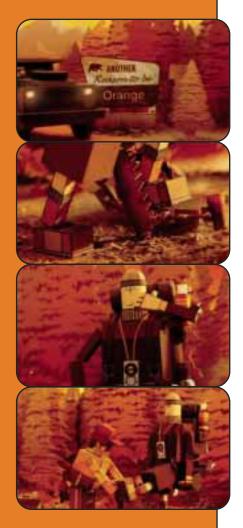
fish to promote bonuses for pre-paid

accounts. The more one adds to the

account, the bigger the bonus.

In this animated spot, called
"Bear Trap," that ran in the U.K.,
a robot-like figure that gets caught in
a bear trap is rescued when it uses its
phone to call for help only to
step into another bear trap. The
spot promoting two free minutes
of calling was created by Mother.

In Israel, two riders on a subway are used in a light-hearted way to advertise games. The commercial was created by Shalmor Avnon
Amichay and placed by Pro-Media.



company Orange is, not specifically about the price and a cost-per-minute comparison.

His approach to working with agencies is also pragmatic. While he says working with "the best agency" in each market is "appropriate for Orange's development stage now," he expects to be ready for more coordination at the top in the next 12 to 18 months. That means agency consolidation as Orange did with its media agencies 18 months ago when it began working with either Initiative and MPG in every market.

Meanwhile, one of his goals for 2005 is to move toward a common creative framework. "If you look at all the launch commercials and work developed since the launches, [you'll see] we need a tighter creative framework for all the countries to use."

But he also doesn't want to lose one of Orange's strengths of being international yet local. In a number of countries, including Slovakia and Israel, Orange has been voted a top brand ahead of almost every other brand except for Coca-Cola. "People [just] know we are part of an international business."

He says with some big global brands, like Coca-Cola and Mercedes, everyone knows their heritage. Increasingly—and Orange is a good example—people aren't so sure where these brands come from, he says. "They see them as international corporate citizens, and they take them into their psyche and accept them." This is even better because it poses less of a risk than being strongly associated with a specific country whose reputation can change, he believes.

His assessment of Orange's prospects for progress in getting alignment is also pragmatic. "If I'm realistic, we're at a four and trying to move toward a six," he says.



In what should be a wake-up call to marketers around the world, Leo Burnett Worldwide recently examined how advertising talks to women consumers and found that, for the most part, they aren't listening.

We all know that women are an increasingly influential group of consumers around the globe. In the U.S., they are responsible for an estimated 88% of every disposable dollar with buying power that extends far beyond traditionally female products and household purchases: They buy more than half of all consumer electronics, 54% of all stocks, 63% of all personal computers, and 75% of all over-the-counter drugs.

So why are advertisers doing such a poor job of creating ads that motivate and move women in ways they find relevant and meaningful?

To get a true read on women's feelings about how brands talk to them—or with them, as the increasingly interactive nature of advertising now demands, Burnett did its homework, reviewing published data, speaking to leading experts, interviewing journalists, and conducting informal focus groups in Burnett offices on four continents.

The bottom line? The advertising industry seems less willing to address baked goods, personal effects, and other typically "female-

oriented" categories with fresh, bold, and inspiring ideas. Furthermore, consumers are aware of marketers' failings: They're tuning out ads that don't present women in realistic and believable ways.

Based on this research, we've outlined women's changing perceptions as they pertain to five key areas that impact marketing to women: money, sex, emotion, humor, and authenticity.

топеч

An unprecedented level of financial independence is perhaps the single most dramatic force changing women's lives today. The gains women have made in income and education are fostering

getting a true read on women

Consumers
are...tuning
out ads that
don't present
women in
realistic and
believable ways.

significant shifts in what were formerly the very traditional roles they filled.

One key finding was that there is an emergence of a new consumer class of economically empowered women in societies around the world. This largely younger group of consumers has tremendous buying power which is changing the landscape for marketers.

Not only do women control upwards of 80% of all buying decisions, but their collective buying power now extends far beyond its traditional reach. Regardless of your product category or market, marketers must view women as important, desirable, and discerning consumers and treat them that way.

5ex

Women's newfound willingness to express their sexuality—as evidenced by the global popularity of television programs, books and films, such as "Sex and the City" and "Bridget Jones' Diary" —has given marketers cause to reexamine the tone and look of their advertising.

Women aren't afraid of sex, even in TV commercials. When presented with the right expressions of female sexuality and independence, they actually flock to it. Marketers shouldn't hesitate to appeal to this part of a woman—however, they must make sure their approach is presented from a woman's point of view.



emotion

Women are just more emotional than men. But while emotion is a powerful tool for women, marketers have to keep

an eye on the nuances that tell women whether or not they "get" it. If the emotion in an ad feels wrong or fake, women will reject it immediately.

Burnett focus groups around the world said they want to see women as heroes. They want multifaceted, multidimensional women in their advertising. Women who are strong and determined, yet not stripped of the emotional core that makes them who they are.

humor

Humor is rarely seen in advertising aimed at women, but Burnett's focus groups and other research indicates they would welcome more of it.

When it comes to humor, women seem to be urging advertisers to surprise and delight them. To make them laugh. Products like laundry detergent might not seem as conducive to fresh, funny ideas as beer, but when it comes to traditionally feminine categories, female consumers would welcome a more lighthearted approach.

authenticity

Every marketer has struggled with how to depict women in ways that they can relate to, embrace, and accept. This is especially difficult now, when women's roles are changing so rapidly. If marketers want to build trust and credibility, they must achieve a genuine sense of authenticity.

Women around the world are changing in significant ways, and their evolving perspectives on these five key areas in particular must be addressed by advertisers if they want to truly connect with increasingly skeptical female consumers. As a result, Burnett suggests advertisers follow the following calls to action when marketing to women:

Products like laundry detergent might not seem conducive to funny ideas, but females welcome a lighthearted approach. In the U.K., Burnett created an absurd parody of a soap opera that it called "Cleaner Close" for Procter & Gamble's Daz detergent. In this first episode in the series, mum marches into a nearby pub and confronts her son about a dingy bra she finds in his room. As she lectures his female companion about how Daz gets white clothes brilliant, the camera shows the distressed faces of the young man and an attractive female bartender. When mum shoves the bra into his friend's face, she responds, "That's not my bra."

Not only do women appreciate ads that capture sensuality and power in a positive way, but they are drawn to ads that feature realistic situations where women are naturally and believably in control. In the U.K. spot for Heinz Microwaveable Soup, a woman gets up from bed as her partner sleeps. She walks over to the kitchen where her soup has been heating—and the timer goes off in just two minutes.

- Follow the money: Acknowledge how women's new financial strength is affecting their buying habits in many key categories.
- Try a new position: Sex sells, but it has to be approached with a distinctly female point of view.
- Use emotion carefully: Women will turn off advertising that tries to portray emotion without truly evoking emotion.
- Make it funny: Women would welcome more humor in commercials directed at them.
- Make it real: Present women with authentic characters and situations that they can relate to.

Linda Wolf is chairman and CEO of Leo Burnett Worldwide.



Women appreciate ads that capture sensuality and power in a positive way, like this ad for Black Angel, a Hong-Kong based jewelry store. The copy reads:
"I admit when I'm kissing James, I fantasize about Marc. I admit I only want him for his money. I admit that's why I leave one button too many undone on my shirt front. So?"







MOST VIEWED ADS

Five most viewed international ads on AdForum.com for the week of Feb. 21-27. In all, over 83,031 ads were viewed that week.

Agency Publicis in New York
Country U.S.







Client
Nike
Agency Wieden & Kennedy
Country U.S.

Amnesty International
Agency Euro RSCG Portugal
Country Portugal





Client

Müller

Agency

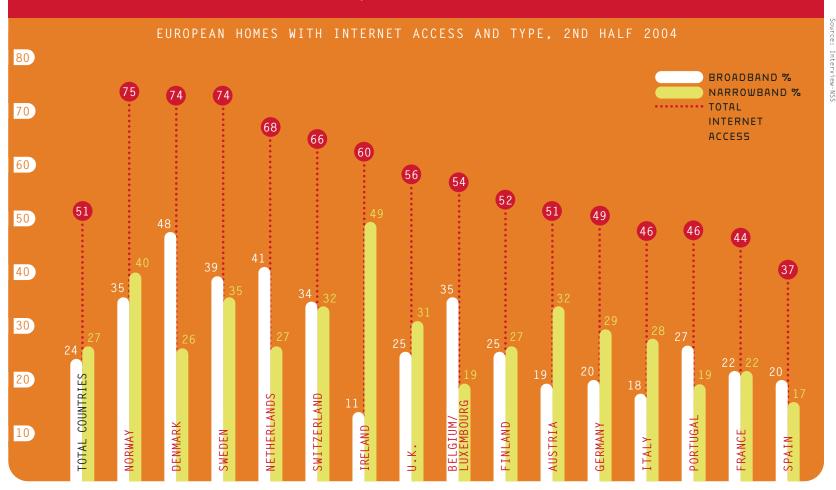
TBWA\LONDON

Country

U.K.



broadband users spend twice as much time online



key automotive marketers and their media agencies

COMPANIES/Brands	U.S.	EUROPE ASIA PACIFI		MEXICO/ARGENTINA	
GENERAL MOTORS Opel-Vauxhall, Daewoo, Buick, Chevrolet, Cadillac, Hummer, Pontiac	UNIVERSAL McCANN (buying through GM Mediaworks) STARCOM (Planning + out-of-home buying through GM Planworks)	UNIVERSAL McCANN except (India,Philippines,Taiwan) STARCOM (Singapore, Malaysia, Saab China) INITIATIVE (Cadillac Taiwan) ZENITHOPTIMEDIA (Cadillac, Chevrolet China)		STARCOM (Mexico)	
TOYOTA Toyota, Lexus, Daihatsu, Scion	ZENITH MEDIA	ZENITHOPTIMEDIA except MEDIAEDGE:CIA (Italy) ICEBERG MEDIA (Spain)	ZENITHOPTIMEDIA except STARCOM (India) THE MEDIA STORE (Australia)		
FORD Ford, Lincoln, Land Rover, Volvo, Mazda, Jaguar	MINDSHARE (Ford) MEDIAEDGE:CIA (Lincoln Mercury, Jaguar, Galpin Ford, Land Rover, Volvo)	MINDSHARE	SHARE MINDSHARE		
RENAULT-NISSAN Renault, Nissan, Samsung, Dacia	OMD (Nissan)	CARAT (Renault) OMD (Nissan)	CARAT (Renault, Nissan in Taiwan) OMD (Nissan)	INITIATIVE (Mexico) MPG (Argentina)	
VOLKSWAGEN VW, Audi, Seat, Skoda	MEDIACOM (buy & plan for VW and buy for Audi) McKINNEY & SILVER (plan for Audi)	MEDIACOM except MPG/ARENA (Spain)	MEDIACOM (Mexico) MPG (Argentina)		
DAIMLER CHRYSLER Mercedes, Chrysler, Smart, Jeep, Mitsubishi	PHD	MEDIAEDGE:CIA except OMD (local buy in Germany; Mitsubishi in the U.K.) SPRINGER & JACOBY (plan in Germany)	MEDIAEDGE:CIA except OMD (Mitsubishi in Philippines) MINDSHARE (Mercedes in Malaysia) CARAT (Mitsubishi in Taiwan) INITIATIVE (Mitsubishi Malaysia)	OMD (Mexico) MEDIAEDGE:CIA (Argentina)	
PSA PEUGEOT Peugeot, Citroën		OMD except MPG (France & Spain)	ZENITHOPTIMEDIA (China) MINDSHARE (Japan)	MPG (Mexico) STARCOM (Argentina)	
HYUNDAI-KIA	HYUNDAI-KIA CARAT HONDA RUBIN POSTAER & ASSOCIATES		ZENITH MEDIA (Australia) MADISON MEDIA (India) MINDSHARE (Hyundai Singapore) CARAT (Kia Singapore, Malaysia, Indonesia)		
			STARCOM CARAT MINDSHARE others		
FIAT Fiat, Alfa Romeo, Lancia		STARCOM (Spain, U.K., Germany) CARAT (France) FIAT MEDIA CENTER (Italy)	STARCOM	STARCOM	
SUZUKI Suzuki, Isuzu	STARLINK (broadcast buying) COLBY & PARTNERS (plan)	BLM (UK) MEDIAEDGE:CIA (German) MPG (France)	UNIVERSAL (India) CARAT (Philippines) MEDIACOM, INITIATIVE, MINDSHARE	MPG (Argentina)	
BMW BMW, Mini	OPTIMEDIA	CARAT (except U.K.), VIZEUM (buying in the U.K.) MEDIAPLUS (Germany)	CARAT	CONTROL MEDIA (Mexico)	

the trust factor

Majority of brands nominated as "most trusted" five years ago have retained their No.1 positions since then

For the first time in the five years since *Reader's Digest* began its annual survey of the most trusted brands in Europe, a second brand, Nivea, has joined Nokia as "most trusted" in its category in all 14 countries surveyed.

The survey represents the opinions of 24,832 adults from the magazine's database across Europe.

In addition to Nivea in skin care and Nokia in mobile phones, Visa also was frequently named, ranking No. 1 in 13 countries, losing out only to Barclaycard in the U.K.

Commenting on Nokia's fifth consecutive "grand slam," Asta Wallenius, who works in brand management at Nokia, said the company is "delighted." He added that the result confirms the company's own

global brand research and indicated its importance by noting that trust comes up as a key factor in decision-making about the purchase of a new mobile phone.

"Brands and products are like yin and yang," he says. "Without a brand that is recognized and trusted, it is hard to succeed even when products are technically superior. On the other hand, understanding and delivering on consumer needs and wants with easy-to-use, well-designed, and reliable products remain key building blocks of the Nokia brand."

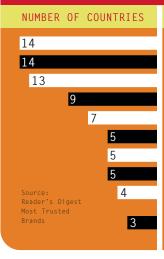
He says that while this is a milestone to celebrate, "having one of the most trusted brands in the world does not allow us to stand still. Nokia continues to actively develop solutions for various usage needs, different lifestyles, and individual preferences."

Two other brands, Canon in cameras and Colgate in toothpastes, received quite a few No. 1 rankings with Canon named in nine and Colgate in seven. Three brands, Ariel, Miele, and IBM, were named "most trusted" in five countries each; Aspirin, Avon, L'Oréal, Nivea (cosmetics), Dell, and Centrum, four countries each, and Pantene, Mercedes, Shell, Persil, Coca-Cola, Hewlett-Packard, Opel, Odol, three countries each.

Global brands continue to dominate categories such as automotive, skin care, cosmetics, mobile phones, credit cards, and information technology. When it comes to holidays, health, and finances, it's the local brands that receive the highest vote. Even soft drinks/ mineral waters aren't as global as might be expected, with Coca-Cola receiving the No. 1 designation in only three countries. The category which consistently year after year ends up with the most changes is insurance.

Gavin Murray, director of marketing & development at *Reader's Digest*, says categories like banks, insurance, and those related to health tend to be stronger locally because of

most nominated brands across europe



NOKIA NIVEA (skin care) VISA CANON COLGATE ARIEL MIELE IBM ASPIRIN, AVON, L'ORÉAL, NIVEA (COSMETICS), DELL, CENTRUM

PANTENE, MERCEDES, SHELL, PERSIL, COCA-COLA, HEWLETT-PACKARD, OPEL, ODOL

BRANDS WINNING IN 3+ COUNTRIES

country specific legislation or regulations related to these industries. Also, holiday companies are more entrepreneurial, often smaller businesses that relate specifically to the needs of the local population, and these often differ greatly country by country. On the other hand, the automotive and PC categories are more global because they are more capital intensive with strong barriers to entry and require economies of scale to maximize their sales so their strategies need to be more global to be effective, he adds.

According to an analysis of the past five years, the majority of brands nominated as "most trusted" in 2001 have retained their No. 1 positions for the past five years.

"Building strong trusted brands is a commitment that leading companies take seriously and have been focusing on for years," said Murray. "They don't risk their winning formula, building on the relationship they have with customers in a consistent fashion, proving that trust is built up over a long period. For this reason it's not easy to dislodge most trusted brands from their top position."

In the most recent survey, questionnaires were produced in 12 languages and mailed in all but the U.K. where the survey was conducted online. Across all countries and all product categories information for over 114,810 different brands was collected and analyzed.

Some of the changes that did occur in the most recent survey included:

BMW became a most trusted brand for the first time. This was in Russia where it displaced Mercedes named in previous four years.

Toyota replaced Volkswagen in Switzerland; Opel replaced Volkswagen in Belgium, and Toyota replaced Volvo in Finland.

In cameras, Minolta
replaced Canon in Switzerland.
In kitchen appliances,
Miele re-took the No. 1 spot
in Switzerland from v-Zug.
In computers, Dell was
No. 1 in Belgium replacing
Compaq; IBM in the Czech
Republic, replacing Intel;
Hewlett-Packard in Portugal
replacing Compaq.

While most of the results were not especially surprising, Murray says he would have thought that Coca Cola would be most trusted in many more countries than three (France, Spain, and the U.K). The PC category is another that is interesting, he says. IBM does not focus on consumers and aims at business, yet is the most trusted brand in five countries. That does highlight that there is a marketing opportunity for brands like Dell and Hewlett-Packard, he says.

categories with most "multi-country" winning brands

Trusted Brand	CATEGORY	BRANDS WINNING IN MORE THAN 3 COUNTRIES	NUMBER OF DIFFERENT BRANDS NAMED AS NO.1 IN AT LEAST ONE COUNTRY				
	MOBILE PHONES	Nokia	1				
t Most	SKIN CARE	Nivea	1				
Digest	CREDIT CARDS	Visa	2				
	CAMERAS	Canon	5				
Reader's	PERSONAL COMPLITERS	IBM, Dell, Hewlett-Packard	5				
Source:	TOOTHPASTE	Colgate, Odol	6				
Sou	COSMETICS	Avon, Nivea	7				
	SOAP POWDER	Ariel, Persil	7				
	CARS	Mercedes, Opel	8				
	HAIR CARE	Pantene, L'Oréal	8				
	KITCHEN APPLIANCES	Miele	10				
	PAIN RELIEF	Aspirin	11				
	PETROL (RETAIL)	Shell	11				
	SOFT DRINKS	Coca-Cola	11				
	VITAMINS	Centrum	11				

Source: Reader's Digest Most Trusted Brand

john goodman

Averages two trips weekly to the 12 offices of O&M across four countries in South Asia plus various regional meetings for clients or the network.

THE BAG This was a free gift from a conference we ran in 1999. I actually picked up a spare, and this is it. The first one collapsed two years ago, and this one's going to do the same soon.





I read a lot about

convergence of devices, Bluetooth, etc. It certainly doesn't seem to be happening to me! Four different devices, plus my phone, endless cables to link them all up. A portable, but messy office.



THE INDISPENSABLES

The bag contains everything essential and never leaves my side. Everything replaceableclothes, toiletries, etc., are in a checked-in case.



THE TRAVEL **DOCUMENTS**

My Indian resident's permit, two passports (one valid, one with visas), and a ticket to my next destination.



THE READING MATERIAL

Some papers, WPP's "Atticus" annual marketing journal, some leisure reading ("The Travels of Ibn Battutah" —now there's a man who must have had a really interesting bag to rummage through) and my Hindi textbook—there to make me feel guilty about not keeping up with my homework.





MISCELLANEOUS

A wallet with foreign currency, another crammed full of pieces of plastic, some spare visiting cards, and a skullcap. The latter because I like to visit mosques in the places I'm going to, if time permits.



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PEOPLE AND PLACES

















Event: "Changing Lives: A Pan-European Perspective" presented by the IAA-France with the Future Foundation. (All photo identifications from left.)

- 1 Neil Holland, Accenture; Eric Stevenson, Hewlett-Packard.
- 2 Mark Gordon, Simpay; Hein Becht, Scan Management Consultants.
- 3 Elliot Polak, Text Appeal.
- 4 Valentina Buonumori, nVision Europe.
- 5 Olivier de Montchenu, EuroNews; Werner Schopff, TBS France.
- 6 Janez Damjan, Sartes Consulting.
- 7 Paul Bay, Citizenbay; Michel Siegfried, National Geographic.
- 8 Ronnie Eide, Re:media; Maebh Quoirin, Future Foundation.



<u>PEOPLE AND PLACES</u>

JUNE 19–25 52ND INTERNATIONAL ADVERTISING FESTIVAL

PLACE: Palais des Festivals, Cannes
RESERVATIONS: www.canneslions.com
or 44-(0)20-7239-3400
PRICE: Various ranging up to full
registration at €2,093 including VAT

JUNE 22–23 ONLINE MARKETING EUROPE 2005

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PLACE: Congress Palace Palma, Palma de Mallorca

RESERVATIONS: www.ome2005.com;

fax: 34-971-72-30-27

PRICE:

€49.90 plus 16% VAT for exhibition; €129 plus 7% VAT for Gala Dinner; €99 plus 7% VAT for closing party

JULY 21–22 CREATIVITY WITH CONSUMERS/CUSTOMERS/ EXPERTS SYNECTICS CREATIVITY WORKSHOP

PLACE: London
RESERVATIONS:
rneill@synecticsworld.com;
44-207-616-9797
PRICE: £1,450 plus VAT

SEPTEMBER 29 2005 EACA EURO EFFIES AWARDS GALA

PLACE: Le Plaza Hotel Theatre,

Brussels RESERVATIONS: www.euro-effie.com PRICE: €150 plus VAT

IAA New York Luncheon

NEW YORK

Event: Tom O'Toole, Hyatt Corp.

speaks on "Managing Brand Delivery
on a Global Scale."

(All photo identifications from left.)

Jay Linden, CNBC International; Naomi Bradford, BBC World; Tom O'Toole, Hyatt Corp.; Simon Davis, CNBC International.



Susan Goldfarb, The Wall Street Journal; Marty Shapiro, CNN International.













NEW YORK

Event: "Top Five Trends from the European Union in 2005," organized by American Business Forum on Europe. (All photo identifications from left.)

- 1 Anne Fasty, United Nations;
 John Zinder, European-American
 Business Organization;
 Deborah Malone, inter national ist;
 Christopher Matthews, European Union.
- 2 Christine Levite, American Express; David Pare, Bowne.
- 3 Marisol Rocha, Association of National Advertisers.
- 4 Susan Savel, Ad International; Henry Meyer-Oertel, ABFE; Glenn Lombino, DigitaltoPrint.
- 5 Penny Scott, Time International; Arthur Anthonisen, Hudson Valley International Trade Association.



I

Looking for spectacular winter scenery for a photo shoot? Hub Culture offers these observations after an Antarctic expedition charting the effects of global warming and climate change in the polar region.

Let's face it, the world is a competitive place, and it's getting only more so. When it comes to the ultimate destination for that big multimillion dollar campaign requiring frosty vistas, Everest Base Camp just doesn't cut it anymore. What's an ad production team to do? Why, head south, of course, to that last great untouched destination: Antarctica. Barren, desolate, a logistical nightmare, and frighteningly expensive, it's the perfect place to justify those inflated production budgets and a four-week shoot schedule!

The reward will be footage

of the most gorgeous place never seen by the masses.

What cachet! The polar south has light you could never buy, slanting in rays on ice to create mirages and vistas no computer simulator can match. It's heaven, only colder. Your main views will be of the sea, ice, penguins, orcas, and falling icebergs, all images of extreme cold, perfect for that ice cream shoot.

Scheduling time on land for shooting and filming requires months of planning and more than likely, private helicopter transfers on and off the ice, with guides and other professionals to scout for safety. Logistics can be difficult, but there is one contact who can walk you through what you need to know and where you need to go. His name is Alejo; he has a very long beard and is an explorer in every sense. He is reachable only by intermittent satellite phone as he spends his time "on the ice," but his main man is Nicolas Pivcevic at Aerovias DAP, a transportation company in Punta Arenas, Chile, which can help plan the logistical side of your visit. You can reach him at 566-122-3340; nicolaspivcevic@aeroviasdap.cl. Climate-wise, you need great, strong outerwear for a visit, as temperatures can be extreme. A recent Hub Culture expedition was supported by 66 NORTH (www.66northus.com), an Icelandic maker of outerwear and extreme weather clothing.

When to go? Winter is nearly impossible, but in summer from November through February, the days are long. Remember that in the weeks surrounding the winter solstice there is no night, so if you are going for the stunning polar sunsets or auroras, you will have more luck early or late in the season. Final caution: don't fall in the water...your campaign will be gone in 60 seconds, and so will you.



The coast of Antarctica is made up of large ice shelves that drop precipitously to the sea. Glaciers have receded by up to five kilometers in the last 20 years, a visible sign of global warming.

Twenty years ago, areas such as this on the

Antarctic fringe were almost always covered

with snow; today because of global warming,

they are often bare for a few weeks.



Stalliaker

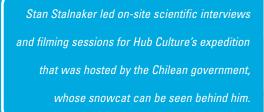


The Chilean military base
O'Higgins is one of the only
outposts on Antarctica.

The ultimate cool destination for that frosty photo shoot, Antarctica offers stunning vistas.



Trees are not abundant,
but bird life and sea life are.





Darling, it's time for that jet set frou-frou French ooh-la-la thing to come back en vogue, because all this French bashing is very passé. The French are totally a la mode at the moment, and that augurs well for the Monaco Grand Prix, Cannes Film Festival, and other events in the sunny Riviera, including the Cannes Ad Lions, also on the way.

you cannes do it

You've secured your VIP access at the American Pavilion, scoured the VIP room at Bungalow 8 NYC for an in to the Hotel du Cap, and now you've just got to get your ticket before jetting off to Cannes and la vie VIP du Méditerranée!

But wait, quel horror! There are no flights?! No flights! This is typical of France; do not panic.

Normally you fly to Nice, which can accommodate seven passengers only, so you are likely to find no availability on anything, including that orange airline Easyjet with flight attendants in baggy jeans. So your next best option is to commandeer a private ride on Netjets. This is best done by sucking up to someone you met last year at Cannes, but if it's your first time, try flying to Marseille instead. A taxi to Cannes is only about €300 and two hours of Gauloises fumes, but it is money you would have spent on Cristal sprayed into the pool at Nikki Beach Club, so no real loss.

playing the rooms field

Upon arrival in the south of
France it is very important to
understand the intricacies of
where you stay. Most activities
take place in and around the
Palais du Festival, a giant triangle
of a building that blocks traffic
at the end of the Croisette. Do
not under any circumstances
assume that because all Cannes
hotels say they are full that is

acceptable to stay in Nice or Bangladesh or the next closest town with available rooms. If they have rooms, it means no one wants to be there, and you are not trying hard enough. Acceptable nearby locales do include Cap Ferrat, Juan-les-Pins, Antibes, and Mougins. Conversely, staying up the coast at the Hotel du Cap is worth the distance because you are staying at the Hotel du Cap, and thus allowed to be late for everything. "Traffic, you know, Hotel du Cap," will suffice as an excuse for the whole week under all circumstances.

If you get a hotel in Cannes, the power structure is around the InterContinental Carlton, the Martinez, the Noga Hilton, and the Majestic. If you need to do an event, know that the Carlton will annoy you and do it half right, while the Martinez is a bit more chic and pricey; go to the Noga Hilton only if you work for Intel and like bad lighting. It's very blah-corporate.

The truly chic take villas and apartments in the hills along the coast or around the Croisette. Philippe Marmayou is the one to call on that front—his real estate holdings are slim, but he knows everyone. His apartment rents for \$500 a night (a bargain!), is small with a great terrace and weird keys. It's an adjustment from hotel life, but worth it for the balcony views. Reach him at 336-2545-5799.

the sea, see, scene

When in Cannes, we take all our meals at Farfalla. Located on the Croisette across from the Palais, it is packed with cool urbanites and good music. It just has that something that the other restaurants don't. The owners are fabulous: Christian and his brother have been running it since whenever. They are very nice to their friends and even civil to people they don't know, a rarity in the south of France. The food is great too, especially the beef tartar. There

with sandals and dark Valentino shades will do just nicely for males.

As mentioned before, you may see people spraying champagne into the pool, onto the beach, and at anyone reasonably cute. There is no reason to indulge in such behavior yourself, as it's very nouveau. Instead, donate a small sum to charity and lie back on your Hermès towel feeling good about the wonderful things you are doing in the world, ignoring the irony of your towel costing more than some sub-Saharan annual incomes.

taking it all in

Back in Cannes, when everyone else is showering, take a nice stroll down the beach, past the



If you end up in
Cap Ferrat, Club
Dauphin at the
Grand-Hotel du
Cap-Ferrat offers
spectacular views
overlooking the
pool stretching
far into the
Mediterranean.

are other places to go, but really, just let them hook you up on the inside dinner track. Relax, it's Cannes, you don't want to look like you are trying too hard.

Should you have time, take the gin palace over to Nikki Beach or Club 55. Novices, you must pronounce the latter as "Club Sank-on-Sank," or you're finished. This is where everyone goes for rosé in the afternoon with a huge fruits du mer—enough seafood for the mob. For females, uniforms are bikini, bling-jewelry, and towering high heels with see-thru wrap; suit

clowns and corporate touts. flying banners, and branded taxis as the sun sinks into the ocean behind a sea of Arab yachts. Think to yourself about the romance of the Riviera and all the glamor of the past, Bridget Bardot and all of that. Then realize this: Today Cannes is Europe's Vegas. More expensive. Just as corporate. Nearly as cheesy. But somehow, like Vegas, it's a required stop. Make the most of it and be frou-frou for a week, but buy your towels beforehand, since the Euro is like, crazy high.