

# Cutting Edge: Our weekly analysis of marketing news

25 January 2017

Welcome to our weekly analysis of the most useful marketing news for CIM and CAM members.

**Quick [links](#) to sections**

## Marketing trends and issues

### Advertising

#### Most-complained-about ads

MoneySuperMarket was at the top of the list of the most-complained-about adverts last year. Gary the dancing bodyguard, Dave the twerking businessman and Colin the builder received a total of 2,491 complaints. Meanwhile Match.com's ad, which featured a woman removing her female partner's top and kissing her, received 896 complaints from people who thought it was too sexually explicit. Paddy Power's ad showing blindfolded men playing football and appearing to kick a cat received 1,000 complaints when first shown in 2010 and a further 450 last year. None of the ads were banned. Guy Parker, Chief Executive of the ASA, said that ads with the most complaints are not necessarily the ones that are banned.

**The Times, 19 January 2017, p24**

#### JCDecaux focuses on digital

Out-of-home advertising specialist JCDecaux, one of the largest OOH ad companies in Europe, joined the Internet Advertising Bureau UK last year in recognition of its increasing digital focus. According to a recent report from GroupM, digital is expected to make up 43% of OOH ad spend in the UK in 2017, up from 38% in 2016. JCDecaux, which is the UK market leader for digital OOH, aims to reach one billion digital impressions by the end of the year.

**emarketer.com, 19 January 2017**

#### Brexit presents opportunities say 23%

New research from advertising think tank, Credos, reveals that 23% of those in the advertising sector believe that leaving the EU will provide opportunities for international growth. However, 22% said they had lost business or contracts following the Brexit

vote. The figures are part of a larger survey on the impact of Brexit, which is due to be discussed at LEAD 2017, the advertising leadership summit. The research was based mainly on agency opinion.

**research-live.com, 13 January 2017**

### Agencies

#### Production companies – bid-rigging row

Following a suggestion by the IPA that ad agencies should be allowed to compete against production companies in the same pitch, 15 production companies have used an open letter to ask agencies to avoid a "rigged" bidding system. The open letter states that: "Even with the best of intentions the process will be rigged against us and we don't want to be part of it". This follows an investigation by the US Department of Justice into whether ad agencies are rigging pitches so that their own in-house production division gains an advantage.

**Campaign, 20 January 2017, p5**

#### Trends in diversity

In January last year *Campaign*, together with the IPA, published their first diversity survey of the ad industry. It specifically looked at the gender and ethnic make-up of the largest ad agencies. Agencies have subsequently risen to the challenge by using new role models in their campaigns and launching industry initiatives to address the imbalance. However, this year's survey reveals that women now account for 30.2% of the top two levels of seniority, which is slightly lower than over the past two years. The Campaign/IPA target is 40% by 2020. The survey also found that there is no significant pay gap between men and women, but women are more likely to embrace flexible working opportunities. Detailed data are included in this article.

**Campaign, 20 January 2017, pp38-41**



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[www.cim.co.uk/charteredcpd](http://www.cim.co.uk/charteredcpd)

## **Brands and branding**

### **Brand strategy in the digital age**

The author, founder and MD of the brandgym, reports on a survey of marketing leaders of major companies on the topic of brand strategy and its place in the digital age. He concludes that brand strategy is in crisis in a world where digital marketing is dominant. The challenge is not so much to reinvent brand strategy as to “reboot” it for the digital age. Three main drivers of success for brand strategy are identified: a deeper insight into people’s lives, not just products and services; brand positioning with a greater sense of purpose; and simpler, more visual brand positioning outputs. These success factors are explored together with examples deriving from the interviews.

**Market Leader, Q1 2017, pp20-24 (Taylor)**

## **Conferences and events**

### **Attendees concerned about data protection**

Nearly two-thirds (64%) of event attendees are concerned that they are disclosing too much personal information. This is according to a new report entitled *Digital Transformation in the Event Industry* by Xing Events, which surveyed event organisers and participants. When asked what digital solutions they were planning to use, the majority of event organisers said online marketing (57%) followed by email (45%) and event apps (44%). Xing Events says that event planners should do more to ease the concerns of delegates and show them the benefits of digital marketing tools.

**Meetings & Incentive Travel, January 2017, p12**

### **Trump – the industry view**

*M&IT* asks event professionals for their views on how the Trump presidency will affect the meetings industry. Some are optimistic that booking trends won’t change and that the US will remain a popular destination for events or even that Trump’s business background could strengthen the industry. Others hope that Trump’s presidency will be “more reasoned than his electioneering rhetoric”. However, many people in the events industry are female or from the LGBT community and they are likely to feel threatened by the new administration.

**Meetings & Incentive Travel, January 2017, pp13,18-19 (Channon)**

## **Consumer behaviour**

### **Shaping markets – user influence**

Users are important in various market-related contexts such as new product development and value co-creation, but existing research either exaggerates or understates the way in which users shape markets. The authors explore the user-market relationship and propose that “market shaping” consists of five interrelated processes in which users may act as agents. They then elaborate on and identify conditions that are likely to affect user

involvement in each of these processes. They find that the extent of user influence will vary according to individual markets and across markets.

**Marketing Theory, Vol 16(4) 2016, pp445-468 (Harrison and Kjellberg)**

### **January sales fatigue**

New research suggests that consumers suffer from “sales fatigue” in January, with only 37% being “excited” at the idea of January sales. The focus on sales results in consumers who pay the full price for an item feeling cheated: 64% of those who bought a product at full price said they felt negative towards the brand when they saw it discounted. Consumer fatigue towards the January sales is also due to consumers having more choice of, and time to look for, discounted items in the run-up to Christmas and following it.

**Campaign, 20 January 2017, p8**

## **Customer relations**

### **Standardisation vs customisation**

Service industries face a daunting task when designing a service that can meet the needs of diverse customers and there is a trade-off between customisation and standardisation. A high level of customisation might please the customer but it involves greater cost, a longer waiting time and higher customer involvement in the service delivery process. This study seeks to develop a tool to measure the level of customisation-standardisation of service and its relationship with loyalty. Three industries – education, hospitality and health care – were selected for the study.

**Journal of Marketing Analytics, Vol 4(2/3) 2016, pp66-76 (Kasiri and Mansori)**

### **Net Promoter Score**

For over a decade the Net Promoter Score (NPS) has been used to measure customer satisfaction through just one question: “How likely is it that you would recommend our company/products/services to a friend or colleague?” NPS has been the subject of much controversy and criticism. A key problem is the “say-do” gap: research from COLLOQUY reveals that just 13% of customers go on to make a recommendation after saying they will do so. B2B research reveals that just 5% of companies follow up with consumers by asking them to make the recommendation. To make NPS a better predictor of consumer behaviour, companies should ask “When will you make this recommendation?” They should also try to establish why the consumer decides to make a recommendation or not. This can provide an opportunity to change consumer behavior in a meaningful way, rather than just measuring it.

**retailwire.com, 18 January 2017**

## **Direct marketing**

### **EU privacy regulation**

The European Commission submitted its proposal for the Regulation on Privacy and Electronic Communications on 10 January. This article looks at the scope of the Regulation, which covers cookies and electronic direct marketing. Currently there are extensive rules about electronic direct marketing, which mainly refer to prior "opt-in" consent and the right to object or "unsubscribe". The new Regulation will require compulsory caller-line identification for direct marketing calls. Currently, direct marketing firms can hide their phone numbers from the recipient. In future, as well as caller-line identification, they will have to use a specific prefix or code to indicate that this is a direct marketing call. This could have quite an impact on the direct marketing industry.

**lexology.com, 18 January 2017 (De Smedt)**

## **Law**

### **Get it right – copyright protected content**

The *Get It Right from a Genuine Site* campaign aims to raise awareness of the value of the creative industries to the UK. It also covers the distribution of educational e-mails by Internet Service Providers to residential broadband subscribers whose internet connection has been used illicitly to share files that contain copyright-protected content. This article provides information about the campaign and how it aims to educate consumers about the wide range of legal sources of content available to UK consumers, while promoting the value of creative content and copyright. The campaign has already reached 21% of the population – although piracy levels remain constant, they have fallen significantly among those exposed to the campaign.

[www.gov.uk/government/news/get-it-right-from-a-genuine-site-copyright-campaign-update](http://www.gov.uk/government/news/get-it-right-from-a-genuine-site-copyright-campaign-update), 19 January 2017

## **Marketing**

### **Online data capture**

Designing online registration pages can be tricky especially when trying to strike the right balance between the value of what the person receives and what personal data they are prepared to divulge. Sometimes a compromise has to be made between the extent and accuracy of the data and completion rates. A survey conducted some years ago by Marketo found that a short-form web registration form with five or fewer fields led to a 34% increase in conversion and reduced the cost per conversion by 25%. Five experts discuss how to optimise the online registration process.

**Database Marketing, November-December 2016, pp24-25 (Lawson)**

## **Role of stories in improving RNPs**

It is common practice to elicit help from consumers in new product development. Input is easier to acquire for incrementally new products (INPs) than for radically new product (RNP) concepts. The difficulties that a customer might have in imagining the future use of a product in a concept test can reduce their ability to provide information that could help improve the radically-new product concept. This article examines the role of transportation (the mental image of a product concept and the way of using it) in concept tests for radically new products. It proposes that concept descriptions in a story format can enhance transportation and finds that more "technologically reflective" people are better at coming up with concept improvement ideas for radically new products.

**Journal of Product Innovation Management, Vol 34(1) 2016, pp101-118 (Schweitzer and Van den Hende)**

## **Under-representation for all minority groups**

*Marketing Week's* annual 2017 *Career and Salary Survey* reveals that the lack of diversity within marketing teams is worsening: 31.1% say disabled people are under-represented compared with 28% in 2016; 12.5% agree that LGBT employees are under-represented compared with 11% in 2016; and 29.6% of marketers believe ethnic minorities are under-represented. A fifth point to under-representation for older people while religious groups and single parents are also perceived to be under-represented.

**marketingweek.com, 20 January 2017**

## **Market research**

### **Trusting research**

For years the researcher with a clipboard was the only contact people had with market research. These days market research is frequently reported by the media. Research Now partnered with ESOMAR to conduct an extensive study of public perceptions of market research. It revealed a general agreement (76%) that market research studies help organisations to understand people better, while 63% said it helps companies and governments to make better decisions. However, less than half of respondents said they trust market researchers with their information although the level of trust depended on the methodology. Motivations for taking part varied from rewards to altruism. The conclusion is that the industry should regain a connection with participants by helping them to understand why the research is being undertaken.

**Research World, December 2016, pp12-13 (Courtright)**

## **Qualitative research**

The author (whose full article, written in August 2016, is available on the ESOMAR website), argues that qualitative research is no longer about scalability – the ability to ask an open-ended

question of thousands of people – but is “morphing into something else, something resembling the function of ‘account planners’ that flourished in much of the English speaking creative and marketing world from the 1970s – 1990s”. He sets out six reasons for the rise of qualitative research.

**Research World, no. 61 December 2016, p54 (Appleton);**  
[rwconnect.esomar.org/the-silent-rise-and-blossoming-of-qualitative-research/](http://rwconnect.esomar.org/the-silent-rise-and-blossoming-of-qualitative-research/)

### **Ogilvy turns to primary research**

Kevin Chester, Chief Strategy Officer at Ogilvy & Mather London, describes how the agency is using primary research to understand what people outside London are thinking. The agency’s “Get Out There” initiative sends planners around the UK to talk to real people and report back with photos, videos and words. It is based on the premise that primary research influences less than 2% of briefs while 94% of planners use the internet or secondary data. Ogilvy’s planners started in Boston, Lincolnshire (home of the highest Brexit vote) in November and then moved on to Oldham (the most deprived town in the UK) in December in their quest to get closer to real people!

**Campaign, 20 January 2017, p15 (Chesters)**

### **Public relations**

#### **PR – shouldn’t be too global**

Warren Johnson, founder of W Communications, talks about the global PR agency model. He believes that global deals can be damaging to clients – PR is all about “understanding local culture, local customers, local media, local politics”. The agency, founded in 2008, has grown to the point that it is now working with large brands such as Marmite and Ben & Jerry’s. Last summer it opened its first overseas office in Singapore and launched in Amsterdam in partnership with a local agency. Johnson’s views on social-media influencers, Twitter, diversification, the PR stunt and virtual reality are also covered.

**PR Week, January-February 2017, pp32-33 (Harrington)**

### **Sponsorship**

#### **Alibaba joins top-tier Olympics sponsors**

Alibaba is to sponsor the next six Olympic Games at a cost of at least \$600m. The e-commerce giant joins the likes of McDonald’s, Coca-Cola and Visa in the “worldwide sponsorship programme” for the International Olympic Committee (IOC). Alibaba will provide technology services to the Games’ organisers and will set up the Olympic channel, a new digital TV service promoting the Olympics to younger people. It will also tailor the channel for Chinese audiences. The IOC has been keen to attract Asian sponsors to help promote its events around the world. Top tier sponsorship has traditionally been dominated by Western companies.

**Financial Times, 20 January 2017, p19**

## **Agriculture, fishing and forestry**

### **A dip in guacamole expected?**

In the lead up to the Super Bowl demand for guacamole tends to rise as people gather to watch the event. This year the price of avocados is likely to rise due to strikes in Mexico, the largest importer. This year’s Super Bowl on 5 February may be the last to see a free flow of avocados since the new president, Trump, has said he will renegotiate the North American Free Trade Agreement. Ironically, Trump’s threats have improved the fortunes of Mexican farmers because the Peso has plummeted, reducing the price for US importers. However, farmers are justifiably concerned for the future.

**Financial Times, 20 January 2017, p30**

### **African agriculture**

Agriculture in Africa is becoming more productive – after years of stagnation, it has registered growth every year since 2005. This is important because 520m Africans are dependent on farming yet they still produce less per hectare than the world average. Panellists at a *Guardian* public debate, in collaboration with Diageo, offered their views on the continent’s agribusiness. They were asked whether big business should play a bigger role in the sector and, if so, what? The gist of the discussion is covered in this article.

**The Guardian, 18 January 2017, p22**

## **Building industry**

### **Trump – will he be constructive?**

What does the Trump presidency mean for the construction industry? Trump’s manifesto states that he will introduce a “visionary plan for a cost-effective system of roads, bridges, tunnels, airports, ports and waterways and pipelines” which will involve a trillion-dollar investment over a decade. The US has the world’s biggest economy but only the 11<sup>th</sup> best infrastructure, according to the World Economic Forum. Republicans are concerned that the infrastructure strategy will involve heavy borrowing. Meanwhile Trump has promised tax breaks for the rich which “makes no macroeconomic sense”, according to Richard Murphy of Tax Research UK. The UK construction industry may find itself affected by Trump’s protectionism.

**Construction News, 20 January 2017, pp12-15**

### **Regional forecasts**

Regional forecasts for 2017 and 2018 (from Hewes & Associates) suggest that the UK construction industry will enjoy sustained growth although it is unlikely that the double-digit growth seen in some areas over the past three years will continue. Just three regions of the UK are predicted to grow in 2018: the Southwest, Yorkshire & the Humber and

the Northwest. In London construction output is forecast to fall by 6.6% this year and 3% in 2018, as the residential market slows down. However, London will continue to be the UK's largest construction market by 2018, accounting for 22.7% of construction activity. The data is set out in the form of infographics.

**Construction News, 20 January 2017, pp30-31 (Schouten)**

### **Housing in England**

This overview of housing in England states that government spending on housing was £28 billion for 2015 to 2016, with the biggest part being taken up by housing benefits. Strategic objectives are: to increase home ownership and the supply of homes, with a target of 1m new homes in England by 2020. It is predicted that there will be at least 227,000 new households formed each year between 2011 and 2021, which is much higher than the average of 166,000 homes built per year over the last ten years. The 2020 target will require 174,000 net additions each year.

**nao.org.uk, 19 January 2017**

## **Businesses and strategy**

### **Boosting employee engagement**

Managers try various ways of improving employee engagement but this often has little impact on long-term retention and performance. The author has conducted research on the brain chemical, oxytocin, which has been shown to enhance collaboration and teamwork. He has developed a framework for creating a culture of trust and nurturing happier, more loyal and productive employees. He identified eight behaviours which stimulate oxytocin production and concluded that trust can be cultivated by setting a clear direction; giving people what they need to get the job done; and then "getting out of their way". In other words "treat people like responsible adults".

**Harvard Business Review, Vol 95(1) 2017, pp84-90 (Zak)**

### **20<sup>th</sup> CEO survey**

PwC's 20<sup>th</sup> *CEO Survey* suggests that CEOs in the UK are more comfortable than other business leaders around the world with regard to the speed of technological change. This is noted as a concern for 59% of UK CEOs (compared with 70% of CEOs globally). CEOs in China (86%) and the US (67%) are also more concerned about the pace of technology than those in the UK. However, the study also shows that UK CEOs are alert to the possibility of cyber-attacks and find recruiting digital skills harder than their peer groups in other countries.

[www.pwc.com/gx/en/ceo-agenda/ceosurvey/2017/uk/key-findings.html](http://www.pwc.com/gx/en/ceo-agenda/ceosurvey/2017/uk/key-findings.html)

### **Diversity in tech companies**

Over the past two years large US technology companies have scarcely progressed in terms of introducing more diversity to their workforce. Pinterest is probably doing better in this respect – in 2015 it published a set of goals for hiring women, black people and Latinos. Twitter, Facebook and Microsoft have also started to embrace diversity goals or "affirmative-action hiring" although they prefer not to call it that. Things have not always gone according to plan: although Facebook told recruiters to make diversity a priority back in 2015, the numbers remain fairly static. Hiring for diversity doesn't always result in the most suitable employees for the job either...

**Bloomberg Businessweek, 23-29 January 2017, pp27-28**

## **Charities and NGOs**

### **Public affairs – successful campaigning**

Last year the Trades Union Congress (TUC) launched a campaign against the Trade Union Bill which it said threatened the right to strike. The campaign was awarded the *PR Week Award 2016* for the best public affairs campaign. It was described as "an outstanding campaign, delivered at pace with an imaginative approach". Kathleen Christie, who project managed the campaign, describes what is required to launch an effective public awareness campaign based on the TUC experience.

**charitycomms.org.uk, 24 January 2017 (Christie)**

## **Economy**

### **New industrial policies and the zombies**

The emergence of a new type of industrial policy on both sides of the Atlantic is leading to some industries being protected and others punished. Whereas incumbent groups can expect to be protected (in Britain, this includes companies such as Nissan), startups may be neglected. This policy could reinforce the existing corporate sector while suppressing the emergence of more efficient firms, something known as the "zombie company" phenomenon. A new OECD paper, *The Walking Dead: Zombie Firms and Productivity Performance in OECD Countries* (Adalet and McGowan), has found a link between zombie firms and declining productivity. A 3.5% rise in zombie share correlates with a 1.2% fall in labour productivity across industries. The new industrial policies may make this problem worse...

**The Economist, 21 January 2017, p67**

### **The UK's housing stock**

The value of UK homes has reached a record total of £6.8 trillion with homes in London and the South-east exceeding £3 trillion for the first time. This means that half of the total value is concentrated in just a quarter of homes. In some areas of Britain –

Hartlepool and Burnley for example – the value of property has declined over five years reflecting weaknesses in the local economy. The data, from Savills, also reveal that people aged 50 and over own £3 trillion of housing wealth while other ages own just £1.6 trillion. Growth in value is likely to slow due to Brexit and restrictions on lending.

**Financial Times, 19 January 2017, p4**

## Energy and utilities

### Batteries store solar energy

Oxspring, a village in South Yorkshire, is to be given free batteries which are able to store electricity from rooftop solar panels. The batteries are linked to a “virtual power plant” which will help to “smooth out” the amount of solar power that is exported to the grid. This experiment is the latest initiative designed to explore the use of batteries for easing pressure on power grids.

**Financial Times, 19 January 2017, p4**

### Wind farms – cost down, investment up

Offshore wind companies say that green energy costs have fallen faster than expected – the cost of electricity from wind projects in the UK has fallen by almost a third in four years, beating a target set by the British Government in 2012. This is according to a report commissioned by the Offshore Wind Programme Board. Capital spending commitments on wind farms reached a record \$30 billion last year, up by 40% on the previous year.

**Financial Times, 24 January 2017, p17**

## Environment

### Fiat Chrysler faces US regulators

On 12 January America’s Environmental Protection Agency (EPA) started action against Fiat Chrysler Automobile for using software in its Dodge pickups and Jeeps that allows them to exceed nitrogen-oxide (NOx) gases from diesel engines. Chief executive of FCA, Sergio Marchionne, has dismissed the dispute as a “difference of opinion” but if the FCA is right, then Fiat can expect a fine, albeit nothing like as severe as VW’s. Fiat is also in dispute with German regulators while, in France, prosecutors are looking at Renault’s high emissions for some of its diesel engines. Many diesel engines emit more harmful gases than under test conditions but enforcement is “almost non-existent” in Europe and no fines have ever been issued to carmakers.

**The Economist, 21 January 2017, p58**

### Unilever has plastics goal

Unilever has pledged that all its plastic packaging will be fully reusable, recyclable and compostable by 2025. This forms part of the company’s aim to achieve the UN’s Sustainable Development Goal 12, which will see waste generation substantially reduced by 2030. Unilever plans to create a “plastics

protocol” for the FMCG industry and intends to share the results of its investment in solving recycling problems. This article examines the barriers and implications for Unilever’s strategy.

**The Grocer, 21 January 2017, pp12-13**

## Fashion

### Burberry sales up despite price rise

Luxury fashion house Burberry has reported a strong performance for its third quarter, with sales up by 40% in the UK. Despite a price rise in November to adjust for the falling Pound, Burberry continued to sell its bags, leather wallets and trench coats. British retail revenues reached £7.35m in the three months to the end of December. In addition, the company described sales in mainland China as having undergone an “acceleration”. Burberry added that consumers were increasingly “engaging” with its brand and that its Christmas ad had been viewed over 22m times.

**The Times, 19 January 2017, p42; The Guardian, 19 January 2017, p24**

### Bioluminescent dress

A team of designers and academics has created a dress coated in bacteria. It was designed as part of research into the use of bioluminescent bacteria in fabrics. The team experimented with various fabrics and food sources (including Marmite) to develop an agar jelly solution which the dress was dipped into. The photobacterium, which can glow for up to 72 hours, was added to this.

**Wired, January-February 2017, p109**

## Financial services

### Financial literacy

This study examines consumer financial literacy across various demographic groups. Financial illiteracy is widespread, even in developed countries such as the US, Germany, Sweden and Italy but previous research has indicated that some groups are more financially illiterate than others. The aim of this study is to examine financial literacy among different consumer groups by asking the question: “How does financial literacy vary by the intersection of gender and ethnicity across generational cohort?” It also looks at income and education as factors that can help identify the most vulnerable consumers. A survey of consumers in the US is conducted.

**Journal of Financial Services Marketing, Vol 21(4), pp308-324 (Nejad and O’Connor)**

### Innovation in insurance

Two years ago insurance company, Direct Line, set out to shake up the industry with the aim of repositioning itself as a “fixer” brand. It believes that due to technological developments, the focus for insurance will be on transitioning from a restitution business to a business of prevention. Mark Evans,

Marketing Director at Direct Line Group, and Sam Wise, joint head of planning at Saatchi & Saatchi, explain how Direct Line is innovating. One innovation includes Fleetlights, a fleet of responsive drones that can be called upon to light the way at night.

**Campaign, 20 January 2017, p13**

### **When finance and technology come together**

Ant Financial, Alibaba's digital payments division, attracted around 100m new clients last year. It now has over 500m customers, which is almost ten times the number of customers of the world's largest banks. In this blurring of the boundaries between finance and technology there is likely to be considerable consolidation and job losses. Around 1.7m jobs are expected to be lost as banks digitise their operations over the coming decade. The potential for technology to replace humans in the finance sector formed part of the agenda at this year's Davos meeting.

**Financial Times, 18 January 2017, p6**

## FMCG

### **Beverages**

#### **British wine gains Fizz**

British sparkling winemakers have won awards for their bubbly drinks but have failed to find a recognised name. Now a New York bar owner has come up with the expression "British Fizz". The United Kingdom Vineyard Association is applying for protected geographical indication (PGI) status. This would mean that only winemakers who grow grapes in Britain, and make sparkling wine using the traditional bottle fermentation method, could use the term British Fizz on the label.

**The Times, 19 January 2017, pp1-2**

#### **Craft beer – growing the brand**

The number of craft brewers has risen by 24% in the US in the past year and by 65% in the UK over the past five years. Craft beers are also appearing in other markets, such as China. But how do all these players carve out a niche for their brands and how can a brand protection strategy help? This article looks at the pitfalls of choosing a name for a brand. It also looks at trade mark registration and offers some top tips for growing a successful craft beer brand.

**lexology.com, 19 January 2017 (Price)**

#### **Beer and women in Brazil**

Brazil remains the third-largest beer market in the world despite the recession reducing production to 2010 levels last year. For years the country's brewers have been using women and sex to sell beer in their advertising but now things are changing. Ambev, which has 60% share of the

market, has tempered its advertising – its recent Budweiser ad embraces diversity by showing two men kissing during prime-time TV. Heineken's *Moderate Drinkers Wanted* campaign features partygoers who know when to stop drinking. Brasil Kirin, owner of beer brand Devassa, used to show raunchy ads but now recognises the buying power of women and the need for advertisers to approach them in the right way. Separately the *FT* reports on Heineken's talks with Kirin to buy his beer business.

**Bloomberg Businessweek, 23-29 January 2017, pp20-21; Financial Times, 21-22 January 2017, p11**

### **Cosmetics and toiletries**

#### **L'Oréal supports beauty tech start-ups**

In a joint venture between L'Oréal and start-up platform, Founders Factory, partnerships are formed with innovative new companies. The idea is to invest in five early-stage start-ups in the beauty tech sector and to co-create two new companies every year. The five companies include InsiU, which creates personalised natural skincare and Preemadonna, an app which enables people to design and print art on their nails using a smartphone. L'Oréal is also working with online influencers to reach its target audiences.

**Financial Times, 23 January 2017, p18**

### **Food**

#### **Meat-eating and the case of Quorn**

Increasing levels of meat-eating have environmental, health, economic and ethical implications which have attracted the interest of governments, the media and the public. The perceived benefits of meat substitutes have been highlighted in the literature but policy makers have tended to rely on manufacturers to put strategies in place to influence consumer behaviour. This paper explores how values and benefits affect consumer choice of meat substitutes and consumer perceptions of how meat substitute manufacturers can motivate people to change their behaviour. It includes a case study of Quorn, the biggest manufacturer of meat substitutes in the UK.

**Social Business, Vol 6(3) 2016, pp267-290 (Apostolidis and McLeay)**

#### **M&S extends laser tattooing trial**

Marks & Spencer is to expand its use of laser "tattooing" on fresh produce as part of a strategy to reduce the number of paper-based labels that get thrown away. The technology, which has been developed by Spanish company Laser Foods, is currently being tested on coconuts.

**The Grocer, 21 January 2017, p54**

#### **I Can't Believe it's getting a new name**

I Can't Believe It's Not Butter, a Unilever product, is to be rebranded. The spread, marketed as an alternative to butter, was among the best-selling

spreads in the UK during the mid-1990s but sales fell by 52% from 2011 to 2016 and last year the brand lost a third of its value. Now it is to be relaunched with a £1m campaign and a new name: I Can't Believe It's So Good for Everything.

**The Grocer, 21 January 2017, p52**

### **Vegemite returns to Oz**

Mondelez International is to sell Vegemite brand to Bega Cheese, an Australian company, for A\$460m. The deal also includes the sale of Mondelez's other Antipodean brands. The deal means that Vegemite will return to its Australian roots, nearly a century after being sold overseas. Vegemite sales have been stagnating and most of the sales are in any case made in Australia. For Bega this represents a change in strategy since it has until now focused on the dairy sector. For Mondelez, it is a chance to focus on more global brands, such as Oreos and Cadbury's.

**Financial Times, 20 January 2017, p17**

### **Tobacco**

#### **BAT – back in the USA**

The number of cigarette smokers in the US has hit an all-time low but low prices, high disposable incomes and an increasing demand for e-cigarettes and vaporisers have increased tobacco companies' profitability and their interest in the US market. British American Tobacco (BAT) has just agreed to purchase a final stake in Reynolds American. The proposed takeover will create the world's biggest listed tobacco company by sales. BAT is returning to the US over a decade after it sold its subsidiary there to Reynolds. US revenue per cigarette pack is rising at a faster rate than in any other developed market which provides BAT with a huge opportunity for growth. Separately *The Economist* examines the merger and the resilience of Big Tobacco.

**Financial Times, 18 January 2017, p19; The Economist, 21 January 2017, pp57-58**

#### **Coughing billboard targets smokers**

A new campaign, from Swedish pharmacy Apoteket Hjärtat and agency Åkestam Holst, consists of a digital poster which uses outdoor smoke detectors to identify nearby smokers and then triggers a coughing fit in the man depicted on the screen. It then displays nicotine patches and other smoking-cessation products on the basis that the smoker is likely to be more receptive to them. Smoking is already banned in Swedish bars, restaurants and malls and there have been suggestions that it should also be prohibited in outdoor public spaces.

**adweek.com, 16 January 2017**

## **Government and public sector**

### **Tracking Trump tweets**

Donald Trump uses Twitter to express his views so investors, who recognise that this is his main means of communication, will need to pay attention. Mining social media for market sentiment is not a new thing, with automated tracking tools being used to track successful investors. Professional investors have developed algorithms and other systems for tracking social media but, as yet, it is uncertain whether anyone has come up with automated ways of tracking and trading "Trump tweets". In December a Trump tweet on the subject of Lockheed Martin saw Lockheed shares fall just 11 seconds after the tweet. James Ross, head of HedgeChatter, says that Trump will be "the first President to utilise Twitter as a financial throne" which will "dramatically impact all sectors, companies and even countries".

**Financial Times, 18 January 2017, p30**

### **Leaving the EU – the creative industries**

This Lords Library briefing gives information on the possible effect that leaving the EU will have on creative industries in Britain. It points out that creative industries account for a significant part of the UK economy (5.2%) and are valued at £84.1 billion. Creative Europe, formed by the EU in 2014, supports the EU's culture and audio-visual sectors. It has a €1.46 billion budget for 2014-2020. The UK received €40m in grants over 2014 and 2015 but when it leaves the EU it may no longer benefit from this programme. The library briefing covers two areas of the creative industry in detail: the video game industry and the film industry. The debate took place in the House of Lords on 19 January.

[researchbriefings.parliament.uk/ResearchBriefing/Summary/LLN-2017-0003](http://researchbriefings.parliament.uk/ResearchBriefing/Summary/LLN-2017-0003), 13 January 2017

## **Health and pharmaceuticals**

### **GPs – new ways of working**

British general practitioners are angry at the Government's suggestion that they are in part to blame for overcrowding in hospitals. Theresa May has threatened GPs who refuse to extend their hours to seven days a week with a loss of funding. Analysts at the King's Fund, a think-tank, report that GP consultations grew by 13% from 2011 to 2015 and phone consultations by 63%, yet funding for primary care, as a share of the NHS budget, has fallen from 8.3% to 7.9%. Some practices, such as Beacon Medical Group, near Plymouth, are piloting new schemes to ease the burden on hospitals.

**The Economist, 21 January 2017, pp26-27**



## IT and telecoms

### **Indian outsourcing – could fall behind**

India's outsourcing firms, such as Infosys, Wipro and Tata, used to enjoy double-digit growth. The Indian IT industry, which has grown to become a \$140 billion sector, has relied on rich-world economies, such as America and Europe as well as banks and energy companies, for its business. But now growth rates are down to single digits despite a \$900 billion global IT services budget. As well as factors such as President Trump's policies towards immigrant workers and changes in client behaviour, there has been a shift to "digital" services. Indian firms specialise in fixing problems cheaply, not promoting innovation and they will have to adapt to survive. There is already competition from European and US firms which are busy acquiring boutique companies capable of delivering the skills needed. In order to keep up, Indian companies will have to "overhaul" rather than just "tweak" their business models.

**The Economist, 21 January 2017, pp61-62**

### **5G plans while 4G not-spots remain**

Despite many people in Britain being unable to receive a good 4G connection, the Government wants 5G to be the technology that will underpin the country's digital economy. As yet there is no launch date for 5G, although analysts expect the global rollout to be sometime in 2020. A National Infrastructure Commission report has called on the Government to put digital infrastructure at the centre of its industrial strategy. Roads and rail present opportunities for 5G technologies to be embedded in infrastructure. Meanwhile around 20% of urban premises and 80% of rural locations are "not-spots" for 4G coverage!

**The Times (Raconteur: The Digital Economy), 19 January 2017, p8**

## Leisure and tourism

### **Manu tops money league**

Manchester United has reached the top of Deloitte's money league (the football "rich list"), having overtaken both Real Madrid and Barcelona to secure the top spot for the first time since 2003-04. Eight Premier League clubs are to be found among the world's top 20, with Deloitte predicting that the number will reach ten next year thanks to £8.3 billion in TV deals. (See also Cutting Edge 18 January).

**The Times, 19 January 2017, p69; Financial Times, 19 January 2017, p16**

### **Social media in sport**

There have been a number of cases where athletes have contravened their governing body's social media policies. If used unwisely, social media can

have a huge impact on a sport from both a social and commercial standpoint. This article looks at three things that should be considered by brands, athletes or sports fans when it comes to using social media. They refer to intellectual property: protecting your brand and avoiding infringement; social media policies, regulations and sponsorship contracts; and UK advertising regulation.

**lexology.com, 19 January 2017 (Duckworth)**

### **Art courtesy of AI**

This year Sony's SL Research Laboratory will release a pop song album composed by artificial intelligence. JukeDeck, a London based firm, and Google Brain's Magenta project are also investigating AI composition – in 2016 a novel made by AI was on the shortlist of a Japanese literary competition. AI poetry bots are also becoming popular because the nature of poetry helps to hide the clumsiness of AI writing. Google's Deep Dream AI project is creating visual art while programmer, Ross Goodwin, and filmmaker, Oscar Sharp, have used AI to create a six-page sci-fi screenplay.

**Wired, January-February 2017, p114**

## Materials and mining

### **Lithium mining in Cornwall**

The increasing demand for lithium in products such as batteries for electric cars, may make it worthwhile to start mining the metal in Cornwall where it has long been considered to be unviable due to its presence in underground hot springs. A new company, Cornish Lithium, has secured the rights to the largest single mineral exploration programme in the region. Some test boreholes will be drilled to assess whether there is enough lithium to make the project economical. If successful, the UK won't have to rely on imports of the metal in the future.

**The Guardian, 20 January 2017, p31**

## Media

### **Books**

#### **E-book sales down for second year**

E-book sales declined for a second consecutive year in 2016, according to data from the five major publishing groups which together sold 45.7m units, down by 5.1% on the previous year. Only one publisher, HarperCollins, achieved growth in the digital arena: it sold almost 12.6m e-books, up by 18.2% on 2015.

**The Bookseller, 20 January 2017, p7**

#### **One in ten don't own a book**

A report from Aviva reveals that 10% of people in Britain do not own a book, but that the average UK household has 8.2 devices connected to the

internet: a number that rises to 10.9 for homes with children. In total around 6.5m people do not own a printed book, with the number reaching one in five people for the 18 to 24 age group.

**The Sunday Times, 22 January 2017, p11**

### **Sainsbury's books higher sales**

Sainsbury's book sales grew by 7.5% year-on-year for the fourth quarter of 2016 despite its total retail sales rising by just 0.8%. Although some high-profile hardbacks fell "short of expectations" (notably celebrity memoirs whose popularity seems to be on the wane), more than a million *Ladybird Books for Grown-Ups* were sold in the quarter, while sales of *Guinness World Records* rose by 26% compared with the previous edition.

**The Bookseller, 20 January 2017, p23**

## **Internet**

### **Global online advertising**

Google, which dominates online advertising, accounted for one third of expenditure on digital advertising last year. It is followed by Facebook (25.9%) and the three Chinese internet giants: Alibaba (12.7%), Baidu (8.9%) and Tencent (4.5%). Digital adspend is forecast to reach \$229.25 billion this year, up from \$194.6 billion last year. Its share of media spend is predicted to rise from 35.3% to 38.8%. A double page of infographics illustrates the global market for digital advertising.

**The Times (Raconteur: The Digital Economy), 19 January 2017, pp10-11**

### **China tries to brush off fake sales activity**

Packages from China containing counterfeit clothing and other items, which haven't been ordered by the recipient, are being sent to consumers in Britain and America. Recipients are afraid that they have been victims of a scam. In fact this is the result of the activities of "brushers"; these are groups of fake buyers in China who boost sales on an e-commerce site for a fee and then send the products to random addresses. Higher sales help the sellers to move up the search engine listings. The practice is banned in China and big e-commerce sites, such as Alibaba, are trying to stamp it out.

**The Sunday Times, 22 January 2017, p10**

## **Newspapers**

### **Daily Mail pulls out of ad sales initiative**

DMGT has withdrawn from an initiative to pool newspaper ad sales. The project, dubbed "Project Juno", involved News UK, Trinity Mirror, GuardianMediaGroup and Telegraph Media Group, who had been working together since last summer to address falling print ad revenues.

**Campaign, 20 January 2017, p3**

### **Guardian to be cut down to size**

Last year Guardian Media Group said that it would have to make savings of 20% in order to tackle growing losses. It has been working on a number of efficiency projects which are believed to include the creation of a tabloid format for *The Guardian* and the outsourcing of its printing to News UK, publisher of *The Times*.

**The Times, 24 January 2017, p4**

## **Social media**

### **Measuring social media success**

Marketers tend to measure the success of social media campaigns by adding up numbers, such as the number of views or shares or the "ultimate prize" of going viral. Yet the volume of social media activity is not a reliable indicator that the campaign has met its objectives. The crowded nature of social media means that attention as a currency is being devalued. Yet, for a campaign to deliver long-term brand benefits it must create powerful memories in order to influence future purchase decisions. The authors argue that it is the shape of social media conversations that need to be analysed.

**Market Leader, Q1 2017, pp50-52 (Rayner and Findlay)**

### **Building the Zuckerberg image**

Despite Mark Zuckerberg promising to eliminate fake news from Facebook, there are hints that some of his own posts, which include informal images of him and his wife, are scripted. There are claims that some Facebook employees work full-time on drafting posts and speeches for him while others delete troll comments and spam, as part of a strategy to protect the Zuckerberg brand. Some observers speculate that Zuckerberg's style has become "increasingly presidential" and that the drive to create a good image may be part of a political ambition! However, the image Zuckerberg is trying to cultivate has been tarnished by some of his behaviour, such as trying to evict families in Hawaii so that he can extend his beach-front estate!

**The Times, 20 January 2017, p3**

## **Television**

In the final quarter of 2016 Netflix attracted 5.8m paying customers bringing its total subscribers up to 93.8m globally. Its four-quarter profit also exceeded expectations, at \$67m. Netflix's full year revenue was up by 35%.

**The Times, 19 January 2017, p46**

## **Packaging**

### **Coca-Cola increases recycling targets**

Coca-Cola is to increase the amount of plastic packaging that can be recycled or reused. Its target is to recycle 70% of packaging by 2025, up from 14% now. Other companies have been making similar pledges at the World Economic Forum at

Davos. (See also Cutting Edge 18 January)

**The Times, 18 January 2017, p20**

### **Veuve continues to sparkle**

Champagne brand Veuve Clicquot, has received several awards for its innovative packaging. In 2012 it gained a place in the Pentawards Hall of Fame, which recognises excellence in creative packaging. This year it is working with packaging company, DS Smith, and paper-maker, Favini, to develop a 100% recyclable carton design using paper from grape residue and natural fibers. This process saves 5.2 tons of virgin fiber per batch. Ahead of Valentine's Day and Mother's Day, Veuve will reintroduce its Clic'call, a talking, limited-edition gift box that allows people to record a personal message which is played when the box is opened.

**brandchannel.com, 19 January 2017**

## **Retailing**

### **Reducing the addiction to growth**

Retailers are often addicted to growth and will aim for double-digit growth by opening new stores even though this may damage their profitability. A study of US retailers has revealed that less successful retailers continue to focus on growth by opening new stores amid declining returns. In contrast, the more successful retailers reduce their expansion while improving existing stores to boost sales. The authors provide a framework for deciding when to switch to a low-growth strategy and how to implement it. If executed well, retailers can remain in the maturity stage of their life cycle for a long time.

**Harvard Business Review, Vol 95(1) 2017, pp65-74 (Fisher et al)**

### **The sharing economy**

The move towards sharing the costs of services and purchases is particularly evident among Millennials, with 53% having participated in the sharing economy over the past year. This compares with just 16.2% of shoppers over the age of 35. This article asks how retailers can tap into the trend. Rikke Rosenlund, co-founder of BorrowMyDoggy and a speaker at Retail Week Live in March, offers her thoughts on the subject. Verdict Retail consulting director, Joseph Robinson, says the sharing economy could prove to be an area of investment for retailers.

**retail-week.com, 20 January 2017**

## **Services**

### **Royal Mail posts a decline**

Royal Mail reported a 2% fall in UK revenues for the nine months leading up to Christmas Day accompanied by a 6% fall in the number of letters and cards sent. Royal Mail attributes its woes, not just to a decline in the number of Christmas cards

but to the trend for people to communicate by text, e-mail or social media. Increased uncertainty due to Brexit has also hit advertising and business letters. Although the delivery market is growing at an estimated 15%-20% a year, Royal Mail's portion of it is growing at just 2% a year.

**The Times, 20 January 2017, p38; The Guardian, 20 January 2017, p31; Financial Times, 20 January 2017, p21**

### **Greggs caters for businesses**

Greggs the baker is trialling a new service which delivers bakery products to the financial services centre in London. It aims to be the "caterer of choice" for office parties and meetings. The company, which is already testing out the service in Newcastle and Manchester, is also developing plans for a click-and-collect service.

**The Guardian, 18 January 2017, p19**

### **Pet spending not at home this Christmas**

Britons can usually be relied upon to spend money on their pets, but not this Christmas, so it would seem. Pets at Home has reported flat revenues for the quarter leading up to 31 December compared with the previous year. Overall revenues rose by 4.4% thanks to a strong performance from its grooming and veterinary services (up 7%). One analyst suggests that Pets at Home is not "such a big fish" online and that the trend to use the internet for pet products may have been greater than the group had anticipated.

**The Times, 20 January 2017, p40**

### **New Big Mac but will it reach Millennials?**

When McDonald's discovered that only 20% of Millennials had ever tried a Big Mac, it decided on a change of strategy. On 18 January it launched two new Big Macs in the form of Mac Jr. and Grand Mac. Burgers account for 20% of McDonald's sales but there has been little serious innovation over the years. It may be difficult for McDonald's to attract younger customers simply by changing a product that they have never been interested in. The company might be able to play the nostalgia card, which Millennials might respond to. New Big Mac ads will start appearing in February which may just persuade the new generation to try the fast-food.

**Bloomberg Businessweek, 23-29 January 2017, p62**

## **Transport and travel**

### **New cars**

China, the biggest car market in the world, experienced a 15% increase in the number of new cars sold. This was mainly due to government tax incentives so it is likely that growth will slow this year as incentives are phased out. EU new passenger-car registrations rose for a third year in a row. Meanwhile the Brexit vote hasn't greatly affected sales of new cars in Britain where low

interest rates have helped the industry. Sales of cars in the US are expected to flatten or decline this year.

**The Economist, 21 January 2017, p83**

### **The internet of bicycles**

Bike-sharing services have caught on in a big way in China. Companies such as Mobike, ofo and U Bike, allow riders to use apps, find the nearest bike and reserve it for up to 15 minutes. They then scan the QR code on the bike and receive authorisation. This is considered much more efficient than the traditional cycle rental services offered by cities. By the end of this year it is estimated that between 8m and 10m of these "internet" bikes will be in use in China.

**Financial Times, 20 January 2017, p13**

## Buzz phrases

### **Returnships**

"Returnships" are work placements aimed at helping women to continue with their careers after having a baby or taking a break from work. A cross-party group of MPs is calling on the Government and business to do more to help women return to work. One of the recommendations is that paid returner programmes or returnships should be created to provide training, advice and support. Research suggests that increasing the number of women in work by 5% would result in an additional £750 in tax revenue and a decline in benefit costs.

**The Sunday Times, 22 January 2017, p11**

Written by CIM's Knowledge Services Team

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## On the Move

Name	From	To	New title	Source
Hamish Asser	Millward Brown	Populus	Head of Brand and Communications	research-live.com
Christopher Bone	FMcM Associates	Hay festival	Publicity Director	The Bookseller
Susannah Dewey	Michael Kors	Warehouse	Senior Marketing Manager	fashioninsight.co.uk
Rob Hattrell	Tesco	eBay	UK Vice President	retail-week.com
Alison Hoad	RaineyKellyCampbell Roalfe/Y&R	Bartle Bogle Hegarty	UK Chief Strategy Officer	Campaign
Alistair MacCallum	M2M	M/SIX	UK Chief Executive	Campaign
Hannah Macey	The Louisa Drake Method	Equinox	PR Manager	fashioninsight.co.uk
Nick Munday	Thorntons	Young's Seafood	International Sales Director	The Grocer
Paul Stoddart	Capita	CWT Meetings & Events	MD for UK, Ireland and Benelux	Meetings & Incentive Travel
Jessie Sullivan	The London Library	The Quarto Group	Senior Marketing Manager	The Bookseller

## Promotions

Name	Company	Previous title	New title	Source
Rob Waddington	Penguin Random House	International Sales Director	Group Sales Director	thebookseller.com

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[www.charitycomms.org.uk](http://www.charitycomms.org.uk)

Construction News

Database Marketing

The Economist\*

[www.emarketer.com](http://www.emarketer.com)

[The Financial Times](http://www.thefinancialtimes.com) ~

[www.gov.uk](http://www.gov.uk)

The Grocer

[The Guardian](http://www.theguardian.com)

Harvard Business Review\*\*

Journal of Financial Services Marketing\*

Journal of Marketing Analytics\*

Journal of Product Innovation Management\*\*(12 month embargo)

[www.lexology.com](http://www.lexology.com)

Marketing Theory

[www.marketingweek.com](http://www.marketingweek.com)

Market Leader

Meetings & Incentive Travel

[www.nao.org.uk](http://www.nao.org.uk)

PR Week

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[www.researchbriefing.parliament.uk](http://www.researchbriefing.parliament.uk)

[www.research-live.com](http://www.research-live.com)

Research World

[www.retail-week.com](http://www.retail-week.com)

[www.retailwire.com](http://www.retailwire.com)

[www.rwconnect.esomar.org](http://www.rwconnect.esomar.org)

Social Business

The Times

[Wired](http://www.wired.com) (selected articles available)

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