

# Cutting Edge: Our weekly analysis of marketing news

21 September 2016

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

#### Effects of sex and romance in advertising

A recent survey of full-page ads in major US magazines revealed that sexual imagery was present in 27% of them (up from 15% in 1983). Sexual imagery is commonplace in advertising but there has been little research into its effect on preferences. The authors discover that exposure to sex-based ads reduces preferences for romantically-associated products and services in men. Yet exposure to romantic imagery in ads does not decrease their preference for sex-related products. They also find that exposure to sex-based ads does not lead to a decrease in preference for romantically-linked products in women. Reasons for the findings, their implications, and the effect of sex-based ads on dating and relationships, are discussed.

**Journal of Marketing Research, Vol 53 August 2016, pp479-496 (Ma and Gal)**

#### Shorter ads can be brilliant too

In 2005, 75% of TV ads were 30 seconds or shorter, but over the past decade this figure has reached 84%. Yet over the last three years just 3% of gold and silver Cannes Film Lions, and 6% of British Arrows gold and silver awards, were of 30 seconds duration or shorter. Awards and status generally go to creations of 60 seconds and longer. The author says the industry has forgotten how "brilliant" shorter ads can be, reminds us of their potential, and cites a few examples, such as John West's *Salmon* and VW's *Singing dog*.

**Campaign, 16 September 2016, p31 (Outhwaite)**

### Agencies

#### Ditch the pitch!

The author argues that the pitch process is one of

the most complex and disruptive parts of agency life; it is also "notoriously flawed" due to "ridiculously" short or long lead times, long pitch lists and the difficulty of the client reaching a decision. He suggests that it is time for a change: one should consider other methods of selecting an agency and agencies should provide some leadership. Ultimately it is the people that count, rather than the pitch, because they understand the brand, can establish credibility and build rapport.

**Journal of Strategic Marketing, August-September 2016, pp38-39 (Curtis)**

#### When creativity moves upstream

Companies are constantly trying to create brand differentiation which has led to creative thinking gradually moving upstream into the companies themselves. This is demonstrated by the recruitment of creative people by technology companies; the acquisition of creative companies by management consultancies; and the efforts of many large companies to develop a creative culture. This has disrupted the roles of agencies while at the same time creating new opportunities for them. Here are four implications for brand agencies.

**Admap, September 2016, pp22-24 (Shaw)**

### Brands and branding

#### Type fonts – use in brand gender perceptions

The literature suggests that the use of brand gender (brand masculinity and femininity) can produce positive results, but little research has been done into how brand gender perceptions come about. This research looks at font as a possible contributor to brand gender perceptions for unfamiliar brands. Three studies use a range of type fonts, brand names and product categories to show that type font affects consumers' perceptions of brand gender. A fourth study suggests that a type font representing the brand can influence consumers'

likelihood to recommend that brand.

**Journal of Marketing Communications, Vol 22(4), pp403-418 (Grohman)**

### **Place-making and branding**

The concept of "place-making" has been part of urban jargon for many years but it continues to present a solution to the problem of separatism and a way to help create desirable destinations. A key part of the place-making strategy should be branding; this is an expression of the values and personality of a community rather than just a name or logo. Within the place-making strategy is environmental branding; this helps places to express their identity and personality while offering benefits to local residents, businesses and communities, as well as offering good returns for developers and investors.

**London Business Matters, September 2016, p34 (Cohen)**

### **How valuable are brand likes?**

Brands invest heavily to increase their social media following while at the same time trying to assess the return on investment. Researchers at Harvard Business School have undertaken five studies to address two questions: if someone likes a brand, are they more likely to buy it; and do people's likes influence their friends? The research used some well-known brands, such as Coca-Cola and Pepsi. Results suggested that social media marketing doesn't necessarily produce returns and that further steps might be needed to turn a "like" into profitable behaviour. If it became harder to join user communities, this might increase the impact of a "like" but it might also be better for consumers to communicate their preferences offline!

**Harvard Business Review, October 2016, pp24,26**

### **Children**

#### **Zero-data apps protect under-13s**

Some of the world's largest toymakers have been fined by the FTC for illegally collecting data on children. Over 80% of children, aged 13-plus, have access to a tablet. US and EU laws make it illegal to collect data from under-13s without parental consent. Soon every app in the US will be required to have two modes: over-13 (data-rich) and under-13 (zero-data), reflecting a growing intolerance by the FTC of the "grey areas" of engaging with under-13s. In Europe the same standards are embodied in the GDPR which will soon be enforceable with heavy fines. The advice, if operating in the under-13s market, is to address your technology now!

**thedrum.com, 17 September 2016**

### **Conferences and events**

#### **Getting the delegates talking**

In this short opinion piece the author argues that delegates at an event should derive as much value from talking to each other as they do from the event

content. Here are some tips for getting delegates to communicate with each other. They include publishing the list of attendees, create situations in which people have to talk, and producing event apps which could include an element of gamification.

**Meetings & Incentive Travel, September 2016, p22 (Bowden)**

### **Corporate trampolining springing up**

*The Guardian* examines the craze for trampolining as a corporate teambuilding event, an activity that HR departments increasingly view as an innovative way of bringing people together. There were just four indoor trampoline parks in the UK last year but now there are 96. Of course there are risks: a Bupa Hospitals fun day, organised a few years ago, ended up with one participant being admitted to his own hospital!

**The Guardian, 17 September 2016, p13**

### **Consumer behaviour**

#### **Reaching Gen Z**

Increasingly Generation Z is responding unfavourably to advertising, especially if it appears on social media, and will often skip an ad or close it because it is "annoying". Brands need to be careful about what image they project and which online platforms they use. Some brands are using influencers but they need to ensure that they retain their personalities and don't alienate their audiences. As the attention span of Gen Z becomes shorter, brands will need to use more channels to reach them. Snapchat and Instagram are rapidly becoming media platforms of choice for brands to reach this group. This article lists nine social media habits of Gen Z.

**PR Week, September-October 2016, pp46-47 (Sanchez)**

### **The rise of the singletons**

Being single is becoming the norm in England and Wales, where 51% of people are single. To coincide with the new *Bridget Jones* movie, *The Telegraph* examines the various "singleton tribes" from the perspective of single women. They include SAGs (single agains); the Messy Single (see BBC series *Fleabag*); 'Better Off Out Of It Single'; and the confirmed singles (see Gillian Anderson in *The Fall*).

**The Daily Telegraph, 16 September 2016, p25**

### **Customer relations**

#### **Engagement and competitive advantage**

In an era of intense competition, tech developments and social media, interactions between customers are commonplace and companies need customers to be engaged. The authors discuss the definitions of customer engagement (CE) and employee engagement (EE) and develop tools for measuring both. They develop a framework which is tested using data from 120 companies. The results show that the influence of EE on CE is affected by

employee empowerment, the type of company (B2B or B2C) and the nature of the industry. This effect is stronger for B2B firms and services (rather than manufacturing) firms. They find that the influence of CE on firm performance is stronger than EE even though both positively influence performance.

**Journal of Marketing Research, Vol 53 August 2016, pp497-514 (Kumar and Pansari)**

### **Customer expectations vs customer care**

Customers want good service and some defect after just one bad experience. Rising customer expectations have implications for customer care centres across all sectors. McKinsey believes that two factors will change the face of customer care: understanding the evolving value and complexity of transactions; and choosing the right level of human interaction and automation. A survey of customer-care leaders led to the following conclusions: inbound transaction calls will decline or disappear completely; internet robots and virtual assistants will become gatekeepers for critical channels; focused investments will be needed in order to improve the skills of customer-care workers; demand for higher-end personal experiences will make companies think about the levels of customised care provided and whether they should be in-house or outsourced; and technology-investment choices by managers will be crucial.

**mckinsey.com, September 2016 (Berg et al)**

### **Direct marketing**

#### **Plans to remove rules on cold-calling**

The Solicitors Regulation Authority (SRA) currently has a regulation which forbids solicitors from making cold calls to members of the public. However, in an attempt to reduce the size of the handbook, this particular rule has vanished from the draft code of conduct. The Association of Personal Injury Lawyers (APIL) is concerned that this may lead some solicitors to contact people without their permission. Neil Sugarman, president of the APIL, has been campaigning for a complete ban on unsolicited calls within the claims sector. Last year National Accident Helpline joined forces with seven law firms to create an ethical marketing charter, which sets out rules for gaining personal injury work.

**lawgazette.co.uk, 15 September 2016**

### **Law**

#### **New copyright rules take aim at video hosts**

New European Commission proposals will mean that websites which host videos, such as YouTube, will have to take more responsibility for copyright infringement. Currently such websites remove material when alerted by rights holders, but the new proposals dictate that they will have to make proactive checks on whether content contains copyright material. The changes could give rights holders more scope for challenging the big internet

companies, such as Google. However, the big companies argue that they will place an unfair burden on their businesses. Critics also claim that the measures will hit smaller internet companies particularly hard.

**Financial Times, 15 September 2016, p6; The Guardian, 15 September 2016, p11**

### **Marketing**

#### **Influencer marketing**

The use of brand ambassadors can be traced back to US tobacco companies of the 1870s. With the rise of social media, the use of individuals to promote a brand message to online audiences is growing. Unlike brand ambassadors, influencers can be more spontaneous in their delivery, the tone of their message tends to be more conversational and the language is familiar to their followers. According to a recent research from McKinsey, word-of-mouth strategies, such as influencer marketing, can result in twice as many sales as that of paid advertising. This article identifies some of South Africa's influencers, looks at some effective local campaigns and examines the pitfalls. (See also under Social Media)

**Journal of Strategic Marketing, August-September 2016, pp43-44 (Haw)**

#### **Precision vs mass marketing**

The ad industry is currently obsessed with precision targeting, but marketers should also be investing in mass marketing in order to build brand fame and to have a cultural impact. This article looks at "mass vs precision" marketing. Marc Pritchard, CMO at Unilever, recently admitted that: "We targeted too much". He is now looking at how to get, "the most reach but also the right precision". P&G is in the process of spending more on TV and traditional mass media. After all, at the end of the day brands still need mass appeal...

**Campaign, 16 September 2016, p24 (Binns)**

### **Market research**

#### **Rebranding the focus group**

Suggestions that the days of focus groups are over may be exaggerated: PwC's report, *The Business of Evidence*, reveals that there are two growth areas: Big Data analytics and qualitative research – notably groups. One problem lies in definition: qualitative research and focus groups are often considered to be one and the same thing. The term 'focus group', originally introduced in the US, has since been "debased by politicians and ridiculed by the media". Yet no better way of gaining certain kinds of insight has been found, hence the more recent rebranding of focus groups to "co-creation" sessions. The signs are that in the future, integrated qualitative solutions will be found.

**Admap, September 2016, p33 (Yakob)**

## Public relations

### What the journalists say

*PR Week* has conducted a survey aimed at throwing light on the relationship between PR pros and journalists, both of whom affect each other in their work. While 38% of journalists agreed that PRs are good at their jobs, 46% disagreed with this. The latter group believed that PRs do not devote enough time to reading the papers, websites and magazines that they are pitching to, resulting in irrelevant communications being offered to journalists. Nevertheless PR is still a crucial source of information for 32% of journalists. Additional data is supplied in the text and in the form of graphs.

**PR Week, September 2016, pp58-63 (Griggs)**

## Sponsorship

### Is Coke's sponsorship model "broken"?

Bobby Brittain, ex-marketing director at Coca-Cola GB, has described how the company's sponsorship model is "broken". Coke has been an Olympic sponsor since 1928 but, speaking at the Oystercatchers Club Panel last week, Brittain claimed that the current sponsorship model "no longer functions" and that in the current environment being a sponsor can be a "competitive disadvantage" since Coca-Cola's plan for the Olympic period was "utterly predictable". Nevertheless, Coke's campaign was the second-most effective of the main Rio sponsors; it achieved 17,405 mentions globally over the two-week period, only surpassed by Samsung's 20,635 mentions.

**thedrum.com, 14 September 2016; marketingweek.com, 14 September 2016**

### Paralympic commitment questioned

Many Paralympic sponsors failed to capitalise on the event, according to the latest *Brand Agility Index* from Waggener Edstrom Communications (WE). It reveals that ten out of the biggest Paralympic sponsors generated a total of just 5,116 global mentions on social media during the Games. In contrast, the 11 main Olympics sponsors generated 76,226 mentions. Atos was the most mentioned Paralympic sponsor (1,658) followed by Samsung (1,028). Yet major brands, such as Coca Cola, only created 312 global mentions, Panasonic received 130 and Omega 64. Gareth Davies, head of digital and insight at WE, questions whether some sponsors are truly committed to the Games.

**marketingweek.com, 19 September 2016**

## Agriculture, fishing and forestry

### Bayer-Monsanto – an integrated offering

Bayer's takeover of Monsanto would lead to a company that provides a full range of seeds, crop sprays and advice to farmers around the world, in one integrated solution. Two other deals in the

agribusiness – Dow Chemical's planned takeover of DuPont and ChemChina's proposed purchase of Syngenta – will also result in a one-stop shop for farmers. The global market for agricultural inputs is worth €120 billion and Bayer and Monsanto together have €23.1 billion of that. However, BASF, which has remained apart from the deal-making, believes that farmers like having the freedom to choose rather than having access to a small number of big suppliers. (See also under Health and Pharma)

**Financial Times, 15 September 2016, p17**

### Precision farming

Microsoft's engineers have been working on technologies that will cut the cost of "precision agriculture", using sensors and algorithms to deliver water, fertilisers and pesticides only to crops that need them. The idea is for farmers to cut costs while increasing output and tackling the problem of feeding a growing world population. The new system is being tested out at the Dancing Crow farm in Washington. Other researchers around the world are developing new sensor networks aimed at reducing the \$1,000 price of existing sensors.

**The Economist, 17 September 2016, pp79-80**

### Basmati prices fall

Consumers can enjoy more basmati rice with their curries this year thanks to lower prices caused by the import ban in Iran. Iran is the largest importer of Indian basmati rice, accounting for 20% of the country's rice exports. On 22 July it introduced a ban aimed at protecting its farmers' rice harvests. In the week from 17 August to 24 August basmati rice prices fell by 4% and further falls are forecast.

**The Grocer, 17 September 2016, p18**

## Building industry

### Housebuilders question new build stats

Disgruntled housebuilders have criticised the UK Government for failing to take into account all the new builds completed within the course of a year. They claim that around 30,000 new builds are not being counted every year due to faulty returns from local authorities: the *Ghost* report, an analysis by the Home Builders' Federation, reveals that Whitehall's quarterly and annual *House Building Statistics* underreport new build completions in 75% of local authorities.

**constructionenquirer.com, 19 September 2016**

## Businesses and strategy

### Purchasing knowledge intensive services

Professional services or KIBS (Knowledge Intensive Business Services) can be an important source of intellectual capability and innovation for their customers (the buying firm). The authors investigate the contribution that the purchasing of KIBS can have on innovation at the customer firm. A

theoretical framework is proposed to understand what could enhance the innovation outcomes of purchasing KIBS. It suggests that the way in which KIBS are purchased can influence their effect on innovation. It also gives insights on aspects that need to be considered to increase the innovation outcomes and looks at the role purchasing can play.

**Industrial Marketing Management, Vol 58 October 2016, pp172-186 (D'Antone and Santos)**

### **Business transformation**

Industry transformation relies on a business model that can link new technology to an emerging market. Apple linked the iPod with iTunes to revolutionise the audio devices market. However, most such attempts fail. The authors analysed 40 companies which have introduced new business models and identified six themes: personalisation; a closed-loop process; asset sharing; usage-based pricing; a collaborative ecosystem; and an agile and adaptive organisation. Transformative businesses tend to have three or more such features. For example, Uber has five out of the six features.

**Harvard Business Review, October 2016, pp90-98 (Kavadias et al)**

### **British workers resent colleagues' bonuses**

One third of British workers consider that colleagues who receive bonuses do not deserve them, according to research from the Chartered Institute of Management Accountants (CIMA). Of the 14 countries covered in the report, only the UAE's workers are more negative about bonuses than the British. Professor Wim A Van der Stede says that such perceptions can lead to resentment and undermine employee engagement and motivation, which in turn damages performance and "corrodes culture". CIMA argues that bonuses should be linked to longer-term performance and business goals rather than short-term metrics.

**The Daily Telegraph (Business), 15 September 2016, p5**

### **The superstars**

A small group of huge companies, both old and new, are dominating the world stage. During the 1980s and 1990s it appeared that big companies were making way for a more entrepreneurial culture – some were being broken up while state-owned firms were being privatised. But now, according to McKinsey Global Institute, 10% of public companies account for 80% of all profits. The rise of this so-called "superstar effect" is most evident in the US and particularly marked in the knowledge economy. This series of articles investigates the superstar effect which appears to be gathering strength.

**The Economist (Special Report: The Rise of the Superstars), 17 September 2016, pp16 (after p46)**

## **Charities and NGOs**

### **US religion more valuable than top tech firms**

The US religious sector is worth \$1.2 trillion a year. This makes it equivalent to the 15<sup>th</sup> largest national economy in the world and gives it a higher value than the revenues of the top ten US tech companies put together. The study, entitled *The Socioeconomic Contributions of Religion to American Society: An Empirical Analysis*, was undertaken by Georgetown University in Washington DC. It reveals that over 150m Americans (nearly half the population) are members of faith congregations. The amount spent by religious organisations on social programmes has tripled over the past 15 years to reach \$9 billion.

**The Guardian, 16 September 2016, p29**

### **Advertising spend**

Charity spending on advertising increased by 6% in the year to June, with adspend on digital experiencing the greatest growth. It rose by 89% during the period, from £2.9m to £5.5m, according to data from Nielsen. Spending on cinema rose by 78%, from £3.1m to £5.5m.

**Third Sector, September 2016, p9**

## **Durable consumer goods**

### **Luxury goods not up to expectations**

It looks as if the luxury goods sector has a way to go before it recovers its fortunes – Hermès has abandoned its medium-term sales growth targets while Swiss group Richemont, owner of Cartier and Montblanc, has reported a sales slump of 13% over the five months to August and with no improvement on the horizon. The luxury goods sector has been negatively affected by the global economy, changing Chinese consumer behaviour and the impact on European tourism of terrorist attacks.

**Financial Times, 15 September 2016, p14; The Guardian, 15 September 2016, p29**

### **Amazon launches voice-controlled assistant**

Amazon has launched its voice-controlled Echo speaker (its "intelligent assistant") in the UK, which can play music, provide weather reports and order online shopping. It has already been available for two years in the US, where over 3m have reportedly been sold. Amazon has adapted the technology to the British market so that its software can understand British accents. The microphone, which is activated when users say "Alexa", will be able to answer questions as well as connect to apps. It can even understand references to Monty Python! Apple, Google and Microsoft are all investing in virtual assistants but have yet to release a rival device.

**The Daily Telegraph, 15 September 2016, p8; The Times, 15 September 2016, p22**

## Economy

### **Inflation steady but pound may affect prices**

The consumer price index, which is used to measure the rate of inflation, rose by just 0.6% in the year to August, remaining the same as July, according to the Office for National Statistics. Core inflation also stayed the same, at 1.3%. Reductions in alcohol prices, cheaper hotel rates and discounted clothing contributed to the picture. However, there are warnings that the fall in the value of the pound since the Brexit vote has made imports more costly and that this will impact supermarket and manufacturer prices, which in turn will hit the consumer.

**The Times, 14 September 2016, p38**

### **UK employment at its highest ever**

In the three months to July employment in the UK rose to 31.77m, the highest level since records began. The employment rate was 74.5%, while the jobless rate reached an 11-year low, at 4.9%. Despite this optimistic picture, there has been a slowdown in wages growth, with average weekly earnings rising by just 2.3% for the quarter, year-on-year. While some economists admit that the impact of the Brexit vote on jobs has been limited, others warn that the job market could weaken over time.

**The Daily Telegraph, 15 September 2016, p8**

## Energy and utilities

### **Hinckley Point**

Prime minister, Theresa May, has given the go-ahead for the construction of the Hinckley Point power station in Somerset. Intended to be the first of series of new nuclear reactors in the UK, it has created huge controversy and a number of big questions have been raised, which are examined in this article.

**Financial Times, 16 September 2016, p3**

### **Water – competition in the retail market**

Water regulator Ofwat has proposed that the retail water market in England should be opened up to competition, allowing people to choose their water supplier. The new proposals would allow companies to buy water in batches from existing providers and sell it to households. They might also offer bundles of services – gas, electricity and broadband – alongside water. Banks, supermarkets or phone companies could be amongst those who sell water. Although greater competition may not greatly reduce water bills, it could lead to better service and innovation. For example, at the moment just two of the water companies in England allow their customers to manage their bills using an app.

**bbc.co.uk/news, 19 September 2016**

## Environment

### **Environmental alliance**

An alliance of 36 of the world's largest agricultural businesses has been formed to manage environmental resources more responsibly. This includes the production of palm oil, which is used in cosmetics and food, and which has been criticised for causing deforestation in South East Asia. The alliance will also look at food security and the effects of climate change. The companies, which are responsible for a range of commodities, will collaborate through sharing technology.

**Financial Times, 15 September 2016, p17**

### **Colgate grows through sustainability**

Colgate, which has a presence in 200 countries, has an 86% share of the oral care market. It also has a strong sustainability strategy: this year its first-ever Superbowl ad encouraged viewers to save water by turning off the tap while brushing their teeth. Justin Skala, president of Colgate North America & Global Sustainability, believes that "operating this way makes good business sense...we reduce supply chain risks, operational risks, reputational risks, and build brand reputation and value". Colgate exceeded its 2015 energy (-21.7%) and greenhouse gas reduction (-26.2%) targets between 2005 and 2015. Its water usage is also down by over 33%.

**brandchannel.com, 14 September 2016**

## Fashion

### **Levi's – past its peak?**

Levi's has authenticity and pedigree that would be the envy of many brands. Levi Strauss sold the first jeans in the world, starting in 1873 with a US patent for "waist overalls" while the famous 501 pattern number was created in 1890. Yet "peak Levi's" has long gone – sales were at their highest in the 1990s (\$8 billion) compared with last year's net revenues of \$4.49 billion. This article examines the fortunes of the brand, from its appearance in *The Misfits*, as worn by Marilyn Munro, to cladding Bruce Springsteen on his *Born in the USA* album and, more recently, Levi's jeans were worn by Steve Jobs, because he didn't want to have to think about what to wear every day!

**Management Today, September-October 2016, pp38-42**

### **Asian fashion brands – struggling in the West**

Asian fashion brands are struggling to appeal to the mainstream western consumer. The majority of the world's clothes and bags are manufactured in Asia, yet a ranking of the most valuable apparel labels by Millward Brown reveals that only one out of the top ten (Uniqlo) is Asian. Uniqlo was forced to close its US stores within two years of opening. Differences in cultural tastes, and pricing, are major issues. The

answer might lie in e-commerce and Uniqlo is shifting its business in this direction.

**The Economist, 17 September 2016, pp65-66**

## Financial services

### **Nationwide rebrands as “building society”**

Nationwide is refreshing its brand by reintroducing the words “Building Society” to its name and is launching a campaign aimed at achieving differentiation from competitors. Nationwide’s CMO, Sara Bennison, explains that it is seeking to become a leader in “a category that has become so tarnished” by the financial crisis.

**marketingweek.com, 14 September 2016**

### **Innovation playground to lure customers**

Volsbank eG in Villingen, Germany, has launched an “innovation playground” for its employees to make them “digitally literate”. This is so that when a business client discusses investment in technology, the employee will be more informed and able to offer advice. The playground includes VR headsets, drones, robots and a 3D printer. The German banking market is saturated and many branches have been closing down. Banks are responding by introducing innovations to help clients.

**Financial Times, 20 September 2016, p16**

### **Doorstep lenders move online**

Traditional doorstep lenders, who collect money from borrowers, are moving their operations online. Morses Club, the second-largest such company, is to launch online this year. Provident Financial, owner of Satsuma, an online loans service, says it is likely to break even this year. As the financial watchdog imposes its regulations on payday lenders, Morses sees an opportunity for doorstep lenders to produce online products with more transparent pricing and repayment terms. Analysts estimate that there are 12m consumer in the UK who would not get credit from mainstream banks.

**Financial Times, 19 September 2016, p21**

## FMCG

### **Beverages**

#### **Canadian gin company apologises to Inuit**

Canadian gin company Ungava, has been forced to apologise to the Inuit people after using ad campaigns and branding using cartoon Inuit characters and young women in parka-style costumes. The marketing video, entitled *Discovering the Inuit*, attracted the ire of Ossie Michelin, an Inuk (Inuit) journalist, who pointed out inaccuracies in the ad. Online critics also attacked the company for its use of “cultural appropriation” to sell its products.

**The Guardian, 16 September 2016, p29**

### **Scotch looks to land of dreams**

Scotch whisky exports returned to growth in the first half of the year, thanks to a 41% hike in shipments to India. India has become the third-largest export market, even though it has its own whiskies, such as Royal Stag and Officer’s Choice. The countries growing middle classes seem to have a penchant for Scotch brands, such as Johnnie Walker, which has appeared in around 25 Bollywood films. However, experts believe that the full potential of the Indian market can only be realised when the 150% customs duty is reduced. This article contains statistics for Scotch.

**The Times, 16 September 2016, pp44-45**

### **Food**

#### **Protecting manuka**

With increasing pollution and various product scares, Chinese consumers prefer to consume foreign brands which they regard as safe. Natural foods are doing well, particularly manuka honey, but it is expensive: two jars of manuka honey cost \$127 on Alibaba’s site. Comvita, the biggest honey brand in New Zealand, relies on China for 60% of its sales but counterfeit manuka is rife because of the cost. New Zealand’s Unique Manuka Factor Honey Association, which represents beekeepers and honey producers, wants to trademark the name for use by Kiwis only.

**Bloomberg Businessweek, 12-18 September 2016, p27**

#### **McCain cools to new offerings**

McCain, which has been producing frozen potato products for 59 years, is to launch its first chilled products. Marketing director, Mark Hodge, says that only 8% of chilled potato lines are chips or fries and there is “massive head-room for growth”. In order to grow the brand he believes that McCain should target people who “shop for tonight”.

**The Grocer, 17 September 2016, p37**

### **Household**

#### **Unilever buys up new ideas**

Unilever is looking to acquire actor Jessica Alba’s household goods business, The Honest Company. Unilever is busy acquiring new and innovative businesses – rather than creating new products and business models in-house – that could attract younger consumers. The Honest Company already has a loyal customer base of young mothers who buy nappies, household goods and beauty products from it online. Unilever recently acquired male grooming business, Dollar Shave Club.

**The Guardian, 17 September 2016, p37**

### **Tobacco**

#### **Tobacco thrives through innovation**

Despite all the setbacks, the tobacco industry has proved resilient and it has continued to deliver for

investors. A recent Credit Suisse report, based on data going back to the 1990s, revealed that the tobacco industry had performed the best, with an annualised return of 14.6%, compared with the average of all industries of 9.6%. Cigarettes are cheap to make, they are addictive and customers are loyal to their brands. Tobacco companies have also been highly innovative with the use of products such as chewing tobacco and e-cigarettes. Some have even jumped on the organic bandwagon. The Natural American Spirit cigarettes pack has an image of a native North American smoking a long pipe.

**Financial Times, 17-18 September 2016, p13**

### **England sees lowest smoking rate on record**

According to Public Health England, smoking rates in England have fallen to their lowest on record. Levels have fallen from 19.3% of adults in 2012 to 16.9% in 2015. Experts believe that this could be attributed in part to e-cigarettes. Over a million smokers said they had vaped to help them give up while 700,000 had used a licensed nicotine replacement product. Kingston-upon Hull currently has the highest smoking rate (27 out of 100 adults) while Wokingham has the lowest (fewer than one in ten)

**bbc.co.uk/news, 20 September 2016**

## Government and public sector

### **Brexit questions**

Brexit is still something of an unknown quantity and there are many questions left unanswered. In part of a monthly feature, *London Business Matters* examines some of the key questions on the subject and lists some useful articles and websites offering information and opinion. Questions include: what are the models for the UK outside the EU and what is the LCCI (London Chamber of Commerce and Industry) doing to help companies prepare for Brexit?

**London Business Matters, September 2016, p15**

### **Six seconds deters nuisance callers**

The police have found that, by allowing their non-emergency phone (the 101 number) to ring for six seconds, they can significantly reduce the number of "inappropriate" or nuisance calls they receive. The experiment, which took place in Wales, was designed by the Government's Behavioural Insights Team (BIT) or the "nudge unit". The latter was set up in 2010 to assist public services in drafting policies that took a more realistic view of human behaviour. This article explores other BIT success stories.

**The Times, 15 September 2016, p17**

### **GCHQ to offer national firewall**

GCHQ, the highly secretive Government agency, is

to create a national firewall to block malware (malicious software). GCHQ has warned that cyberattacks have doubled in the space of a year but hopes that a filtering system for national domain names could help to tackle the problem. The firewall, which is being trialled on public sector IT networks, will be offered to consumers and internet providers such as BT and Virgin.

**The Times, 14 September 2016, p2**

### **Communist revival takes modern slant**

Russia's Communist Party was seen to make use of its heritage in a campaign leading up to last Sunday's parliamentary elections. Images of Joseph Stalin smoking an e-cigarette, Vladimir Lenin carrying a laptop and Karl Marks wearing a leather jacket and baseball boots, appeared on posters and leaflets. They were designed to help the Party reconnect with Russian youth, but Russian liberals are said to be concerned about the resurrection of such controversial characters from the past.

**The Times, 15 September 2016, p35**

## Health and pharmaceuticals

### **Health in the workplace**

A survey of companies and employees, *Britain's Healthiest Workplace*, covers employers with more than 20 employees, whether from public, private or not-for-profits. It identifies the links between an employer's commitment to wellness in the workplace and employee health, wellbeing and productivity. Britain's healthiest workplace was found to be Nomura International (large), Adidas UK (medium) and Forster Communications (small). The healthiest employees were to be found at Nomura International (large), Sweaty Betty (medium) and Forster Communications (small).

**Financial Times (Health at Work), 15 September 2016, pp30-31**

### **VR – the new pain treatment?**

Hospitals in the US have been using VR to distract badly-injured patients who are in severe pain. VR systems are finally becoming sufficiently good and affordable for hospitals to want to try them out. Software makers, such as AppliedVR, are supplying hospitals with headsets that play its games. However, VR's effectiveness in treating chronic pain is not yet proven and its lasting effects are unknown.

**Bloomberg Businessweek, 12-18 September 2016, pp34-35**

## IT and telecoms

### **Apple to reduce information for advertisers**

In iOS 10, the latest version of Apple's operating system, the company will share less information with advertisers when a user opts out of receiving a targeted ad. Advertisers argue that this lack of



information will lead to less relevant ads. Apple tracks users by giving them a unique identifier (the IDFA). Previously, when a user opted out of targeted ads, Apple would share some information with advertisers, enabling them to adapt their strategy accordingly. Apple says it will allow search ads on the App Store.

**Campaign, 16 September 2016, p6**

### **PC makers must change to survive**

Consumers are increasingly using smartphones or tablets to the detriment of PCs. The world's largest desktop PC makers (Lenovo, HP, Dell, Asus and Acer) will not be able to survive on profit margins as low as 3% to 4%, according to market analyst Gartner. In the five years to 2015 global sales of PC units have declined by 22.5% and are expected to fall by another 7.3% this year. Gartner believes that PC vendors must focus less on gaining market share and instead look to product innovation and new business models.

**The Times, 16 September 2016, p53**

### **Apps for refugees**

Refugees do not appear to be a promising target market, but displaced people need a lot of help and this is proving to be an opportunity for tech start-ups. Some of the activities they are engaging in are: providing a "learner package" on the country's everyday life (Funzi); learning how to turn waste material into tools (Refugees Open Ware); distributing old smartphones (GeeCycle); and matching refugees with landlords (CALM).

**Wired, October 2016, p46**

## **Leisure and tourism**

### **Love hotels to cater for rising tourism**

Japanese 'love hotels', where rooms are rented by the hour, are being converted into accommodation for tourists. People visiting the country for the 2020 Tokyo Olympics may well find themselves staying in the converted hotels. Currently Japan's love hotels hold 28m guests a year but, changing morals and an ageing population have hit the market, while Japan's tourist industry has rocketed. By 2020 it expects 40m visitors, up from 352,000 in 1964 when it first hosted the Olympics.

**The Times, 16 September 2016, p42**

### **Drone racing hits the mainstream**

Sky and ProSiebenSat.1 of Germany have both invested in the Drone Racing League (DRL) and plan to televise the sport on TV as it becomes mainstream. Drone racing involves pilots racing their drones around a course while receiving images through 3D headsets. The sport already has a large, albeit youthful, fanbase on YouTube. US network, ESPN, has already done a deal with the DRL to show

races in North and South America. Sky said it has invested \$1m in DRL.

**Financial Times, 15 September 2016, p14; The Daily Telegraph, 15 September 2016, p8**

## **Materials and mining**

### **Robots learning to recycle**

The recycling industry traditionally crushes and tears waste materials to make them easier to separate and process. Zen Robotics in Helsinki may help to simplify this procedure with its salvage robots. The robots can identify items of value, such as copper or hardwood, and pick them out. Zen's robots are working at 14 sites around the world and have collected 4,200 tonnes of valuable material. Now the company is using machine learning to teach its robots to take electrical devices apart and extract materials of value without human assistance.

**New Scientist, 17 September 2016, p24**

### **BASF – innovation but stands alone**

BASF is the world's largest chemical company; it sells products to companies such as BMW, Nestlé and P&G, but is largely unknown to consumers. The company is notable for its "systematic approach to innovation". Last year it spent nearly €2 billion on R&D, 10,000 employees were devoted to coming up with new ideas and it produced 1,000 patents. Analysts approve of BASF's vertically-integrated structure and its focus on innovation, but the company may be too rigid in its approach to acquisitions as the rest of the market consolidates. (See also under Agriculture)

**The Economist, 17 September 2016, p68**

### **Aluminium – proving its metal in the west**

The world's largest producer of aluminium, China Hongqiao, plans to expand its capacity this year to 6m tonnes. This means that it will produce 33% more than all the US producers did together last year. China already dominates the global aluminium industry – US and European producers are concerned that Chinese activities will damage the recovery in the price of the metal. China also has ambitions to produce high-quality aluminium for industries including aerospace and automotive, an area hitherto dominated by European and US producers.

**Financial Times, 19 September 2016, p19**

## **Media**

### **Books**

#### **Digital Single market proposals**

The European Commission has come up with new proposals as part of its Digital Single Market strategy. This includes the idea that authors should be able to renegotiate contracts in cases where

payment is “disproportionately low” compared with publishers’ revenues. The so-called “bestseller clause” would help authors who are paid a flat fee, regardless of how many books are sold. Author, Phillip Pullman, has called on the UK government to incorporate the proposals into UK law despite Brexit.

**The Bookseller, 16 September 2016, p9**

## **Film**

### **Visual effects centre on London**

The UK has three out of the five largest visual-effects companies in the world – Double Negative, Framestore and Moving Picture – making it a global centre for film production. The recent drop in the pound has meant that it is even cheaper for Hollywood studios to outsource their work to London. In addition, the UK Government is allowing generous tax breaks for any film with at least 10% of its production in the UK.

**Bloomberg Businessweek, 12-18 September 2016, pp24-26**

## **Internet**

### **Emotional stimuli in internet auctions**

Internet auctions often use design elements on their websites as a way of inspiring a sense of community or competition among bidders. The authors examine the impact of such images on bidding behaviour in a controlled laboratory experiment. The research reveals that participants offer substantially lower bids when they are exposed to images that promote competition emotions, compared with pictures that induce community emotions. The results provide insights into the use of emotional stimuli on internet auctions.

**Journal of Interactive Marketing, Vol 35 August 2016, pp56-69 (Adam et al)**

## **Music**

### **Stream ripping – most popular form of piracy**

A study from the global recording industry body, IFPI, has found that almost half of 16 to 24-year-olds are using “stream ripping” software to copy streamed music illegally and that this has become the most popular form of piracy. The study found that 81% of music listeners on YouTube use it as an on-demand service for music, a fact that YouTube disputes. The IFPI identifies a “value gap” between services, such as Spotify and Apple Music, which paid around \$2 billion to record labels last year, and “user upload services”, including YouTube, which paid just \$634m.

**Financial Times, 14 September 2016, p19**

## **Social media**

### **Professional forums – reactions to posts**

Increasingly B2B companies are using social media as a way of connecting with professional clients. Online discussion forums are often sponsored by companies that wish to be perceived as thought

leaders, in order to gain insight into their customers and to generate sales leads. However, although firms can initiate discussions, they rely on members to continue them. This study looks at a global manufacturer connecting with healthcare professionals through a LinkedIn forum. The authors propose that four types of characteristics jointly influence the number of comments a post receives: content, post, author and timing.

**Journal of Interactive Marketing, Vol 35 August 2016, pp1-15 (Roederkerk and Pauwels)**

## **Measuring the influence of vloggers**

Marketers have been calling for better metrics from social media influencers. The ISBA has recently tried to formalise the relationship between brands and vloggers by introducing a contract that its members can use as a framework. The contract includes guidance on how influencers should label paid-for content and how they should be recompensed for it. Despite the reach of vloggers, such as Zoella, marketers have yet to be convinced about their role in the marketing mix. A survey by GlobalWebIndex last year revealed that vlogs are the least preferred way for people to find out about brands (19%) vs ads seen online (59%) and TV and radio ads (58%). (See also under Marketing)

**Campaign, 16 September 2016, pp2-3**

## **Television**

### **Twitter launches TV app**

Twitter has created apps for Apple TV, Amazon Fire TV and Microsoft’s Xbox One – the social network is to screen US football live, following its purchase of the rights to the National Football League’s Thursday night games. Chief financial officer for the company, Anthony Noto, says that this represents a new stage for Twitter’s “second screen” strategy in which the platform has been promoted as a “great complement to TV”. Twitter is struggling to attract users as it competes with Facebook and Snapchat. It is hoping that this latest move will help to win over a larger audience.

**Financial Times, 15 September 2016, p14**

## **Packaging**

### **France bans plastic cups and cutlery**

France has passed a law banning all plastic cups and cutlery. From 2020 all disposable cups and cutlery will have to be made of biologically-sourced materials which can be composted. In France alone five billion plastic cups are thrown away every year, while only around 1% are recycled. However, there is a question mark over whether the law contravenes EU rules on free movement of goods. The law is also likely to encounter substantial opposition from the packaging industry.

**packagingnews.co.uk, 19 September 2016**

### **Green packaging demand to soar**

Global demand for green packaging is forecast to reach \$242.5 billion by 2021, up from \$161.5 billion last year, according to Zion Market Research. Food and beverages accounted for more than 45% share of the entire market last year while North America was the largest market for green packaging, accounting for over 28% of the market.

**packagingnews.co.uk, 16 September 2016**

## **Retailing**

### **Tesco looks to start-up innovation**

Tesco is to work with start-ups as a way of introducing more innovation into its business. Its latest link-up is with Founders Forum, a community of global entrepreneurs. It has also been working with Rainmaking Loft, which offers shared office space for new businesses. Unilever has a similar programme called the Unilever Foundry.

**Campaign, 16 September 2016, p1**

### **China's top chain stores in trouble**

Chain stores in China have suffered as consumers turn to online retailers, who accounted for 12% of retail sales in the first quarter of the year. Meanwhile the top 100 chain stores grew by just 4% last year, their slowest pace since 2007. Department stores, where sales fell by 1%, fared the worst. Legacy businesses are unlikely to survive unless they invest in technology; 17 out of the top 100 retailers have yet to go online and, even if they did so, it might prove too late.

**Financial Times, 15 September 2016, p12**

### **John Lewis profit fall**

John Lewis Partnership has reported a 14.7% fall in pre-tax profits, which it puts down to a high wage bill, notably the Government's National Living Wage as well as an increase in wages across the company. Meanwhile Waitrose is to put its money into hospitality services, such as bakeries, cafes and wine bars while ditching plans to build seven new stores. *The Guardian* reports on falling profits at both John Lewis and Next, which it attributes to reduced spending on high street clothing in favour of internet shopping.

**The Daily Telegraph (Business), 16 September 2016, p3;  
The Guardian, 16 September 2016, p33**

### **Morrisons on the road to recovery**

Supermarket Morrisons may still be losing market share but its turnaround is evidenced by a third consecutive quarter of like-for-like growth. Its gradual recovery is attributed to the company's return to the core values of low prices, fresh food and good value. However, analysts remain sceptical that shoppers will keep coming back and suggest that there is still room for improvement. Others

believe that Morrisons has yet to differentiate itself from the competition.

**thedrum.com, 15 September 2016**

### **Co-op trials blockchain technology**

The Co-op is trialling the use of 'blockchain' technology which will allow customers to check the provenance of a product using their smartphone. The Co-op has linked up with Provenance, a tech company, which is developing blockchains to allow businesses to make their supply chains more transparent. The company's stated aim is to create a digital history for every physical product that exists. This will allow consumers to make better buying decisions.

**The Grocer, 17 September 2016, p12**

## **Services**

### **The people walker**

Chuck McCarthy is Los Angeles's first people walker. He will walk humans, rather than dogs, for \$7 a mile around the streets. The unemployed actor offers to walk, talk and listen to whoever needs the service. His Facebook page and homemade flyers are all the advertising he needs: because he has received so much response that he has had to train up five more walkers. He has even received requests from overseas!

**The Guardian, 15 September 2016, p26**

### **New drinking venues fuelled by craft beers**

While Britain's traditional pubs are closing at the rate of 21 a week, a new style of drinking establishment is emerging. These are based in places such as train stations and disused industrial buildings. One example is a new Fuller's pub, The Parcel Yard, at King's Cross station in London. The trend is identified in the Campaign for Real Ale's latest *Good Beer Guide*, which claims that the "real ale revolution" is driving this change. The share of real ale is growing – from 55% now, it is forecast to grow to 70% by 2020 – despite the overall decline in the beer market. JD Wetherspoon, which has bucked the trend, is opening 15 to 20 new pubs over the next 12 months.

**The Guardian, 15 September 2016, p5**

### **Uber hit by new rules**

Mayor of London, Sadiq Khan, is supporting the black cab industry by allowing them access to more bus lanes and allocating more officials to regulate private-hire cars. TfL will also invest £65m in helping black cabs to switch from diesel to eco-friendly vehicles. In contrast, private-hire drivers will be expected to pass a stricter driving test, undertake an English-language test and carry additional insurance. Uber's general manager for London, Tom Elvidge, says that the proposals favour black cabs while

discriminating against “drivers who use apps like Uber”.

**Financial Times, 14 September 2016, p2**

### **Tattoo safety – a turning point in fashion?**

Dangerous substances, such as mercury and charcoal, are known to have been used in tattoo dyes. This has come to the notice of the FDA in the US, where the tattooing industry is growing at the rate of 9% (three in ten Americans now have tattoos). The FDA’s Center for Toxicological Research is investigating the inks’ long-term effects on the body. However, there is also evidence that the US may have reached a ‘tipping point’ in tattoo popularity and many young people are choosing to remain untattooed. Separately *The Sunday Times* reports on Margaret Mountford’s (former right-hand woman to Lord Alan Sugar) anti-tattoo stance.

**Bloomberg Businessweek, 12-18 September 2016, pp28-29; The Sunday Times, 18 September 2016, p3**

## Transport and travel

### **EasyJet wants to lead consumers**

EasyJet marketing director, Peter Duffy, believes that brands should “lead” consumers through concerns, such as terrorism and Brexit. The company is launching a 12-month campaign called *Why not?* aimed at inspiring people to be more spontaneous. The effect of terrorist attacks and Brexit has been to reduce consumer confidence while lower demand has led budget airlines to reduce their ticket prices. EasyJet’s revenues fell by 2.6% year-on-year in the three months to 30 June, while Thomas Cook reported that its European bookings were down by 9% for the same period.

**Campaign, 16 September 2016, p8**

### **Ford – up a gear with driverless and electric**

Ford has lowered its pre-tax profits forecast but explains that this is because it will be investing in “emerging opportunities” such as autonomous and electric cars. Chief executive, Mark Fields, says the company is to become “an auto and a mobility company”, in response to people’s shift from just owning vehicles to both owning and sharing them. The company is investing \$4.5 billion in 13 new electric vehicles. However, self-driving cars could take years to provide a return on investment and also face serious regulatory hurdles.

**The Guardian, 15 September 2016, p27**

### **Uber trials driverless cars**

Uber is currently trialling driverless cars in Pittsburgh, a good test city with its winding roads, extreme weather and heavy traffic. It is using Ford Fusions but by the end of the year 100 Volvos will also be on the road. At the moment the cars have drivers in them who can intervene if anything goes wrong. The question is whether people will feel confident enough to hop on board a truly driverless vehicle!

**The Economist, 17 September 2016, p67; Financial Times, 17-18 September 2016, p17**

Written by CIM’s Knowledge Services Team

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Gemma Greaves	n/a	The Marketing Society	Chief Executive	Campaign
Alice Herbert	HarperCollins	Fourth Estate	Publicity Manager	The Bookseller
Jenni Millar	Lazard Asset	AXA Investment Managers	Sales Manager	Financial Times
Michelle Peluso	Technology Crossover Ventures	IBM	Chief Marketing Officer	thedrum.com
James Peoples	BlueBay	Muzinich & Co	Discretionary Sales	Financial Times
Evelyn Sklivas	various	Jenny Packham	Creative Marketing Officer	fashioninsight.co.uk
Eric Vonk	CB Logistics	Better World Books	Strategic Sales Executive, Europe	The Bookseller

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Harvard Business Review\*\*

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Journal of Interactive Marketing

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London Business Matters

Management Today\*\*

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

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

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New Scientist\*\* (1 month embargo)

[www.packagingnews.co.uk](http://www.packagingnews.co.uk)

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