

Cutting Edge: Our weekly analysis of marketing news

11 January 2017

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

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Marketing trends and issues

Advertising

Advertising effectiveness

Advertising budgets are shifting away from traditional media towards digital media but it is important to remember the importance of strategic investment in media advertising. Media selection is difficult when there are so many choices. This article considers media choices and advertising strategy. Advertising for new products tends to be more effective than for established products, where up to half of advertising is ineffective or only partially effective. This is because of a lack of accurate feedback mechanisms. Homework and hard work are more likely to produce effective advertising than genius and big egos. Pre-testing is also a prerequisite as is brand recognition.

Admap, December 2016, pp20-22 (Thomas)

Adtechs suffer funding decline

Funding for adtech companies (advertising technology start-ups) has reached its lowest point in five years, reflecting the position of the ad sector in a market increasingly dominated by the duopoly of Facebook and Google, which jointly accounted for 75% of new online ad spending last year. The adtech sector, which automates and facilitates the buying and selling of digital advertising, has expanded over the past five years but is now in decline. There has been a 33% contraction in the amount of funding over the past year.

Financial Times, 4 January 2017, p16

Brands and branding

Acquiring brand meaning

Brands are purchased by consumers, not made by product manufacturers. The transformation from product to brand involves the product acquiring

“emotionally-based meaning” through advertising, promotion, packaging and the brand owner’s behaviour. Brands have continued to advertise on TV but, as technology has developed, the likes of Google and Facebook have overseen the move to personalised communication to get the “right person, right message, right mood, and right time”. The author argues that digital is diluting brand meaning because it focuses on short-term metrics rather than long-term brand-building. Brands must have meanings that are shared or they will remain just products.

Market Leader, Q1 January 2017, pp45-47 (Lannon)

Brands – the consumer decision journey

With the arrival of the “digital brand ecosystem” the consumer decision journey has shifted from a “funnel” to a “cycle”. Overall positive feeling created by past experiences of a brand, either first hand or second hand, will encourage consumers to choose a particular brand. This article examines the consumer decision cycle and argues that the main job of marketing is to “create and sustain brand associations from experiences which are meaningful and competitively different”.

Marketing Africa, Issue 14 2016, pp44-47 (Staplehurst)

Conferences and events

Making an exhibition of yourself

The author offers eight tips for achieving success at an exhibition including: good design and differentiating the stand; ensuring the literature makes an impact and reflects branding on the stand; thinking about ways to draw people in, such as a relevant freebie or a cup of coffee that will make them hang around for longer; and to follow up on leads – research shows that up to 75% of trade show leads are not followed up.

London Business Matters, December 2016-January 2017, p32 (Knight)



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www.cim.co.uk/charteredcpd

Consumer behaviour

Deceptive consumption

Consumers sometimes indulge in deceptive consumption behaviour; this is defined as “the deliberate falsification or concealment of an individual’s consumption behaviours pertaining to a brand”. The authors set out to define the various types of deceptive consumption behaviour and to investigate the motivation for this behaviour. They argue that such behaviour is in response to an “identity threat” which is caused by a conflict between personal and social identities. They propose a typology to show the different behaviours that consumers exhibit when using deception consumption. The consequences of deceptive consumer behaviours are explored as are the consequences for their relationship with the brand.

Marketing Theory, Vol 16(4) 2016, pp493-512 (Thomas et al)

Processing information – the eyes have it

When people look at goods on supermarket shelves they do so in a particular order. They may also look in a certain direction when processing information online. Research shows that the ease with which people process information can influence their judgement. Now researchers in Hong Kong and the US have discovered that if the direction of eye movement used during product evaluation is considered by the brain to be “easy”, then this can enhance product evaluation. This means that the location of a product, or the way in which it moves, can influence the ease with which it is seen and hence its evaluation.

research-live.com, 9 January 2017 (Bainbridge)

Beyond demographics

Traditional demographic groups, such as retirees and students, aren’t behaving in a “typical” fashion. The concept of conventional stereotypes is being unravelled by younger people in particular. Yet marketers still need to understand what motivates people to buy things even if they can no longer rely on age and gender. A study by smp, entitled *Beyond Demographics*, investigated the earliest stages of the shopper journey and revealed seven different mindsets which are outlined here.

Admap, December 2016, pp43-45 (Cooper)

Customer relations

Cumulative advantage – habit vs loyalty

Lafley and Martin (authors of *Customer Loyalty is Overrated*) ask why companies often resort to rebranding. They argue that companies continually update their business models, strategies and communications in response to the many options now available to consumers. Research suggests that consumers buy the leading product in the market because it is the easiest thing to do and this is what makes competitive advantage sustainable. Every

time a consumer selects a product, its advantage increases over other products and services; this is a process referred to as “cumulative advantage”. The authors offer advice and guidance for building cumulative advantage.

Harvard Business Review, January-February 2017, pp46-54 (Lafley and Martin)

Customer involvement in NPD

Companies increasingly involve their customers in the product development process but little is known about the effect of this involvement in new product outcomes. Customers either get involved in the traditional way, as an information source (CIS), or as co-developers (CIC). The authors investigate how customer involvement leads to successful innovation and discover that each of the two forms of involvement has its own advantages and is suitable for different conditions.

Journal of Product Innovation Management, Vol 34(1) 2017, pp60-80 (Cui and Wu)

Direct marketing

Reasons to return to direct marketing

Digital budgets account for an increasing amount of the marketing budget so why would anyone want to move back to direct mail? The short answer is “because it works”. Consumers are also suffering from “digital fatigue”. In fact a survey conducted last year revealed that 48% of consumers thought that direct mail was a good way for businesses to contact them, with 44% stating that direct mail and door drops were their preferred form of direct marketing. Response to vouchers is a particular benefit delivered by direct mail: 70% of vouchers received in the mail are redeemed compared with 30% received on the phone. The days of high-volume mail may be over but, if well-targeted, it can still provide a good ROI.

Database Marketing, November-December 2016, pp14-16 (Lawson)

DMC – annual report on industry standards

According to the Direct Marketing Commission’s (DMC) latest annual report, consumers in 2016 were mostly concerned about clarity of consent and how far that consent extended to third parties. The DMC, the body that investigates complaints made about Direct Marketing Association members, cites lengthy supply chains and confusion over consent as major concerns last year. It recorded 230 complaints from 1 July 2015 to 30 June 2016. Of the 48 cases it actually investigated, 35 related to data, privacy and quality. DMC’s Chief Commissioner, George Kidd, stressed that that a lack of due diligence could lead to damaged reputations for the supplier, agency and brand.

dma.org.uk, 5 January 2017;

www.dmcommission.com/wp-content/uploads/2017/01/DMC-Annual-Report-15-16.pdf

Law

Consumer trends

This article examines trends in the consumer sector covering retail; the online grocery sector; and hospitality and leisure. It highlights forthcoming legislation that businesses should be aware of and preparing for. These include: employment law; regulation associated with Brexit; competition; the General Data Protection Regulation and privacy changes; and regulations related to food information. The article also covers corporate reporting and governance, real estate and technology.

lexology.com, 3 January 2017 (Batham)

Price-fixing and the rise of algorithms

The first antitrust prosecution occurred in San Francisco in 2015 when e-commerce executive, David Tompkins, pleaded guilty to fixing prices for classic cinema posters sold through Amazon. He admitted to having manipulated the market using algorithms that kept prices artificially high. US and European authorities are beginning to understand the implications of these powerful tools. However, existing antitrust laws may not be enough to prevent companies from abusing their market power in the digital economy.

Financial Times, 9 January 2017, p9

Marketing

Marketing leadership

The authors argue that marketing is important but marketers often aren't. Good marketing, having a CMO at the top table and an influential marketing department can translate into improved short- and long-term business performance. This suggests that marketers should take a serious role in making business decisions, yet in many companies this simply doesn't happen. The authors claim that marketers aren't influential because of gaps in trust, power and skills. The answer lies in leadership skills because the most successful marketers are not just good at doing marketing, they are also good at leading marketing. Barta and Barwise have written a new book entitled, *The 12 Powers of a Marketing Leader*. Here they talk about some of the behaviours required of a marketing leader.

Market Leader, Q1 January 2017, pp28-31 (Barta and Barwise)

Milestone marketing

Marketers can use certain milestones to help them promote and celebrate the brand. These could be anniversaries, ISO certification, acquisitions or industry awards. Anniversaries are probably the most common milestones on which marketing strategies are based. Many Zimbabwean companies regard this as a way of achieving certain brand objectives and benefits, several examples of which are cited here. The article also focuses on the

effects of winning awards, which can be promoted as a brand endorsement by a neutral party.

Strategic Marketing Africa, Issue 4 2016, p47 (Maguwu)

Data analytics in B2B in sales

Analytics are important to B2B sales organisations and can be used to help high-performing organisations to differentiate themselves. A survey of over 1,000 organisations around the world has revealed that 53%, that are high-performing, consider themselves to be effective users of analytics. The survey also shows that most sales organisations (57%) do not regard themselves as effective users of advanced analytics. For analytics programmes to help sales teams make better decisions, companies should do two things well: focus on areas where analytics creates the most value and implement it wisely. Forward-thinking companies are using data analytics and artificial intelligence in four main sales areas: lead generation, people management, cross-selling, and pricing.

mckinsey.com, December 2016 (Atkins et al)

Market research

Digital incentives

Incentives are important to market research but physical incentives, such as gift cards, can be expensive. However, digital incentives, such as virtual cards or payments, can improve the management and delivery of incentives in five ways: they can reduce the cost and work involved in the research project management; they can speed up the delivery of the project; expand the offering to international surveys; make regulatory compliance easier; and make participants happier by delivering instant incentives.

Research World, December 2016, pp38-39 (Shah)

Technology

Market research has been something of a laggard when it comes to technology. Although automation has speeded up some processes over the years, researchers need to basically reinvent themselves. ZappiStore, a specialist in automated market research, held a workshop at the ESOMAR Congress 2016, in which it outlined why market researchers should get up to speed with tech thinking. In this article Dave Birch, a director at ZappiStore, shares his thoughts on the subject.

Research World, December 2016, pp45-47 (Birch)

Public relations

A question of diversity in the UK...

The PR sector recognises the importance of diversity in the workplace but is making slow progress to achieve it. This is according to PRCA census findings as measured against data from the Office for National Statistics. According to PRCA censuses,

over the past five years the industry has increased its representation of Asian or black people by just 1%. This article discusses the work of the Taylor Bennett Foundation (TBF) which works to increase the number of people from black and minority ethnic backgrounds (BAME) who work in PR and comms. Two cases studies are provided.

PR Week, January-February 2017, pp40-43

...and in the US

This article consists of an interview with Jane Dvorak, chair of the Public Relations Society of America in which she talks about the society's strategic plan for 2017 to 2019. She also covers its various initiatives, including diversity in public relations professions and ways in which to engage, retain and mentor Millennials and other new professionals in the field.

Public Relations Tactics, Vol 24(1) 2017, pp8-9

Agriculture, fishing and forestry

Digitalisation

This article examines how digitalisation could change the face of agriculture in a future where farmers may be seen wearing digital glasses or using devices to help them make decisions. With the advent of agricultural "Siris", such as Prospero and Bonirob – robots which are roaming the fields of the US and Germany – what will be left for the farmer to do? It is likely that they will take on the role of "technically-skilled" researchers who will check system recommendations and improve the systems interactively. Now is the time to be developing a model for what digitisation should bring to agriculture.

International Trade Forum, Issue 2 2016, pp28-29 (Walter)

Diversification and communication are key

At last week's Oxfordshire Real Farming Conference Dagan James, owner of Broughton Water Buffalo, spoke about his mission to "sell good quality meat to lots of people". He said he was assisted in this by his decision to rear water buffalo and urged other farmers to consider "diversification into farming outside the box". He also emphasised that the key to success and profitability was PR skills and communication with the public. Many farmers have failed to make a connection with the people who are buying their produce.

fginsight.com, 7 January 2017

Building industry

Construction contracts 2016

During 2016, construction contracts worth £43.55 billion were signed, according to The Builders' Conference. This is 23% less than the value of contracts for 2015 (£56.59 billion). December

proved to be the slowest month of the year, with just £2.63 billion-worth of new business. Laing O'Rourke emerged at the top of The Builders' Conference contracts league table for 2016, despite reporting £246m losses for the year to March 2016. Galliford Try was in second place with £1,544m. In total eight contractors gained more than £1 billion-worth of business.

constructionindex.co.uk, 9 January 2017

Garden villages

The UK Government has plans to build 14 garden villages across England with the aim of providing 50,000 homes. The villages are intended to be "distinct new places with their own community facilities" rather than extensions of existing places. Proposed sites include a former airfield and green belt, but plans for Hertfordshire have already met with opposition from local groups. Some sites have been approved, such as West Carclaze in Cornwall, destined to be an eco-friendly village with energy-efficient homes.

The Guardian, 2 January 2017, p2

Businesses and strategy

Cultural intelligence

In a global economy it is important to be able to communicate and interact with people from different cultural backgrounds. Researchers and practitioners are increasingly interested in cultural intelligence or "a person's capability to adapt effectively to new cultural contexts". The authors research the cultural intelligent scale's "measurement invariance" (whether or not, under different study conditions, measurement operations produce measures of the same attribute). The study was conducted across five countries: China, France, Germany, Turkey and the US. It concludes that researchers should be careful when comparing cross-country and cross-cultural research.

European Management Journal, Vol 34(6) 2016, pp633-649 (Schlagel and Sarstedt)

Management theories – dead ideas?

This article contends that all management theories are based on four fundamental ideas which "bear almost no relation to reality". These are: that business is more competitive than ever before; that we live in an age of entrepreneurialism; that business is becoming faster; and that globalisation is inevitable and irreversible. Management theorists are advised to examine their ideas or risk being exposed as "overpaid pedlars of dead ideas".

The Economist, 17 December 2016, p64

E-commerce for developing countries

E-commerce has the potential to help entrepreneurship in developing countries as it has done in more advanced economies. A recent paper

from eBay's Public Policy Lab reveals that e-commerce is a powerful enabler of exports for small businesses. A pilot project in the German town of Mönchengladbach is used as a model for how public and private sectors can collaborate to help small businesses gain access to global markets. In 2015 the town asked eBay for help in bringing local businesses online. Within six months the participants had sold 65,000 items, created €2.5m-worth of additional sales and reached customers in 79 countries. This is a model that can be applied to developing countries – two Rwandan-based eBay sellers are cited.

International Trade Forum, Issue 2 2016, pp22-23 (Staechelin)

Buying into entrepreneurship

One way of creating a successful business is through "acquisition entrepreneurship" whereby business owners buy and run existing businesses. The authors provide advice for each stage of this process, such as considering whether one has the right qualities for the job; spending up to two years following leads and vetting business prospects; arriving at a deal; and transitioning into leadership, including building relationships with customers, suppliers and employees.

Harvard Business Review, January-February 2017, pp149-153 (Ruback and Yudkoff)

Charities and NGOs

FPS plans announced

The Fundraising Regulator has released details of the new Fundraising Preference Service (FPS) which is due to launch in the spring or summer of this year. It will allow members of the public to choose the charities that they no longer want to receive communications from. Charities for their part will be required to obtain the consent of donors and supporters on a regular basis if they wish to contact them. The FPS has been fiercely opposed by those in the charity marketing sector. The DMA has approved the service in principle but says that it will need to be a robust system.

Database Marketing, November-December 2016, p10

PETA – business has got easier

Tracy Reiman, Executive Vice-President of PETA (People for the Ethical Treatment of Animals), explains how the organisation uses campaigning methods designed to shock people into taking action. PETA, a US group, has a large comms team, including 40 marketing personnel and ten in corporate affairs. As well as influencing people to act differently, PETA works directly with brands to tackle issues such as using wool or leather. Reiman notes that working with companies has become easier over the years. Businesses know they have to engage in a discussion because the public won't

allow them to sidestep certain issues.

PR Week, January-February 2017, pp44-46

Durable consumer goods

TV makers refocus on picture quality

TV makers are beginning to abandon "gimmicks", such as curved screens, just three years after they were launched at the Consumer Electronics Show (CES). Now manufacturers are looking at other ways of improving picture quality, such as ultra-high definition and HDR. At last week's CES in Las Vegas LG had given up on its curved screens in favour of slimmer sets and better pictures. LG and Samsung, who account for a third of the global TV market, have also abandoned 3D sets.

Financial Times, 5 January 2017, p16

Economy

Highest-performing cities

The Demos-PwC *Good Growth for Cities 2016* is the fifth annual index of the highest-performing cities in the UK in terms economic well-being as perceived by the public. Oxford and Reading score the most highly, widening the gap between them and the rest of the 42 cities in the index. However, there is improvement across the board, with Doncaster and Wakefield showing the greatest improvement mainly because of the large numbers of start-ups in these cities. The report, which was compiled before the referendum, identifies some areas that are likely to be affected by the Brexit vote. It estimates that the average city score could fall by 0.04 as a result of Brexit.

The Business Magazine – Thames Valley, December 2016-January 2017; www.pwc.co.uk/goodgrowth

Voter confidence falls

An annual YouGov poll for *The Times* reveals that only 11% of British voters believe their financial situation will get better during the coming year, down from 21% who thought so a year ago. Some 38% of voters think that their finances will deteriorate over the next year, while just 22% believe that the economy is doing well, down from 35% last year. The EU referendum vote appears to influence the way in which people view economic prospects: 46% of Remainers take a negative view compared with just 19% of Brexiters. The poll also covers voter opinions of the main political parties.

The Times, 2 January 2017, p2

Brexit uncertainty to depress economy

An annual *FT* survey reveals that, although the UK is believed to have been among the fastest-growing of advanced economies in 2016, its growth will slow significantly this year. Most of the 122 economists who responded to the survey, expect growth to slow from 2.1% in 2016 to a maximum of 1.5% in 2017. This is due to the depreciation of Sterling, higher

inflation and slower wages growth. Unemployment may also rise as businesses reduce costs and investment due to uncertainty over Brexit. This in turn will hold back consumer spending. Only 3% of those surveyed thought growth would be faster this year than last.

Financial Times, 3 January 2017, p3

Millennials hit gender pay gap in 30s

New research from the Resolution Foundation, a think tank, suggests that the gender pay gap in Britain has all but disappeared for those in their 20s but that Millennial women (born in the last two decades of the 20th century) are still lagging behind their male counterparts. The gap rises to 9% when they reach the age of 30, which is only slightly lower than the gap for Gen X (born between 1966 and 1980) at that age. This suggests that women's pay continues to suffer after they have children. Separately, research from the Institute of Fiscal Studies has revealed that women earn around 10% less after they have their first child.

Financial Times, 4 January 2016, p2

Energy and utilities

Wind overtakes coal for electricity

Last year, more electricity was generated from wind turbines than from coal for the first time in the UK. In 2016 wind farms generated 39 terawatt hours of electricity compared with 31 for coal. Electricity from coal accounted for 9.2% of the total market, down from 22.6% in 2015. Wind power provided 11.5% in 2016, slightly down from 12% in 2015. Carbon Brief, a UK website, estimates that renewable sources of electricity accounted for 25.1% of generation last year.

Financial Times, 6 January 2017, p2; The Guardian, 7 January 2017, p27

Lower CO₂ emissions for 2016

Last year around 20% less CO₂ was emitted as a result of power generation in the UK than in 2015. The findings, which come from Carbon Brief, are attributed to a decline in the use of coal as well as well as the use of lower-emission gas plants. If emissions from other sectors stay the same, this could result in a 6% reduction in CO₂ emissions for the whole of the UK for 2016.

utilityweek.co.uk, 6 January 2017

Environment

Consumers prefer socially-beneficial brands

A study of 20,000 consumers by Unilever has revealed that 33% would "actively choose" to buy brands which they regard as being socially or environmentally beneficial. More than one in five indicated that they would purchase a brand that promoted its sustainability credentials clearly in its packaging or marketing. Unilever believes that this

reveals a "potential untapped opportunity of €966 billion" in the €2.5 trillion market for sustainable goods.

The Times, 2 January 2017, p36

More waste when diners aware of composting

A new study from Ohio State University has found that people waste much less food when they are educated about the harm that wastage can cause to the environment. However, if they know that the food is going to be composted instead of taken to landfill, the educational benefit disappears. In fact, when informed about composting, educated diners waste just as much as those who haven't been educated about declining landfill space, greenhouse gas emissions and water and soil pollution. This provides a difficult problem for policymakers when dealing with the solution to food waste.

farmingfutures.org.uk, 5 January 2017

Fashion

The outlook for fashion

Over the past decade the fashion industry has grown by 5.5% per annum and is now worth an estimated \$2.4 trillion, according to the *McKinsey Global Fashion Index*. This makes it the world's seventh-largest economy if it were ranked among individual countries' GDPs. However, 2016 was a tough year for the sector due to terrorist attacks in France, the EU referendum vote in the UK, and the volatility of the Chinese stock market, all of which have had an impact on the global economy. This article examines the outlook for the fashion industry in 2017.

mckinsey.com, December 2016 (Amed et al)

A material contribution to sustainability

Selfridges, the department store, has launched a sustainability campaign called *Material World*, which aims to raise consumer awareness of the materials they are wearing and how these affect local and global environments. Selfridges has been working with some sustainable fashion brands to understand how eight fabrics, including wool, cotton, leather, denim, plastic, viscose and linen, can be produced in a more sustainable way. The findings will be showcased in Selfridges' Oxford Street store windows and on social media. For example, one shop window is dedicated to "Le Kilt", which uses organic British wool to help preserve traditional weaving skills and to support local communities.

fashionunited.uk, 6 January 2017

Financial services

Emotional regulation and service quality

Few studies have focused on the emotional aspects of the service provider-client relationship and examined its importance in strengthening relationship quality. "Employee emotion regulation" and "customer emotion regulation" can play a major

role in enhancing relationship quality. Employees regulate their emotions through either deep acting or surface acting. The purpose of this paper is to examine how far customer perceptions of employees' deep/surface acting influence customer deep/surface acting in the financial services sector. It also assesses the degree to which customer deep/surface acting strengthens or weakens the level of relationship quality. The survey was carried out among banks in Jordan.

Journal of Financial Services Marketing, Vol 21(4) 2016, pp254-266 (Alnawas and Altarifi)

Global investment banks

Global investment banking revenues for the period 1 January to 19 December 2016 fell by 7% to \$71 billion year-on-year, according to Dealogic. American clients made up half and European clients a fifth of this figure. JPMorgan Chase tops the revenue league table at \$5.7 billion. The most lucrative area was mergers and acquisitions, although even these fell by 3% to \$22.9 billion.

The Economist, 24 December 2016-6 January 2017, p117

Go compare – is it fair?

The ads used for price comparison sites are big and brash, aimed at offsetting the dullness of shopping for financial services. They provide good returns: for every Pound Gocompare spent on its ads featuring the character Gio Compario, it made £1.38 in revenue. According to Mintel price comparison sites are an integral part of the market, with over two-thirds of drivers checking a price online before buying insurance. Yet the Competition and Markets Authority is studying the price comparison market to assess whether competition is really working and consumers understand what they are getting. Its report is due out in March.

The Daily Telegraph, 9 January 2017, p6

FMCG

Beverages

Lager pales into insignificance – IPAs

India Pale Ales (IPAs) fell from favour when lager was introduced to the market. However, with the growth of the craft beer movement, coupled with an interest in history and authenticity, IPAs started to gain traction in America. The new brewers, such as Grant's IPA, were keen to demonstrate their skills with new varieties of hops. This article charts the history of IPAs, which now account for one in three craft beers sold in American bars. This could be bad news for the large brewers that currently dominate a declining global lager market...

The Economist, 24 December 2016-6 January 2017, pp61-62

Organic wine may be better after all

Organic wine has been the subject of controversy among wine experts who are undecided as to its quality. However, a study of wine reviews in the US by researchers at the University of California has revealed that organic wines labelled as "eco-certified" scored 4.1 points more on average than their non-organic equivalents, out of a score of 100. The researchers believe that using organic practices enhances the flavour of the grapes and results in a better representation of the "terroir" of the vine.

The Daily Telegraph, 2 January 2017, p7

Cosmetics and toiletries

Maybelline recruits male blogger

Beauty blogger Manny Gutierrez is the first man to have become the face of make-up brand Maybelline by appearing in an ad for mascara. Maybelline has traditionally used supermodels to advertise its products. Yet, increasingly, beauty brands are using male models in their campaigns – last year American cosmetics brand, Covergirl, used a 17 year-old male as their cover-boy.

bbc.co.uk/newsbeat, 6 January 2017

L'Oréal unveils smart hairbrush

L'Oréal's Kérastase brand's latest innovation claims to be the world's first smart hairbrush. It allows the brand to communicate directly with consumers, enabling "much more personalised marketing". The product, which was unveiled at last week's Consumer Electronics Show (CES) in Las Vegas, uses algorithms to assess the quality of the hair. A microphone listens to the sound of the hair being brushed to identify patterns, while sensors can tell if the hair is wet or dry.

marketingweek.com, 4 January 2017

Food

Cultured meat

New research suggests that less than a fifth of consumers would be keen to try lab-grown meat even though it could be for sale by supermarkets as early as 2022. Just 16% said they would eat cultured meat, in which animal cells are grown into cuts of meat, while 50% completely rejected the idea. *The Grocer* examines the ethical, environmental and health implications of cultured meat and its chances of success.

The Grocer, 7 January 2017, pp5,24-31

Nestlé – changing the menu

Consumers have been turning away from big FMCG companies in favour of smaller outfits selling healthier options. There have also been a number of major mergers, notably Heinz and Kraft, as companies seek to cut costs. Nestlé, which has been missing its sales targets, has fallen short of investor expectations in 11 out of the last 17 quarters. Despite this, it has retained 20% global market

share over the past decade. Lately it has been trying to make its best-selling, albeit unhealthy, foods more palatable to the health-conscious consumer. One initiative was the creation of hollow sugar crystals containing fewer calories than normal sugar.

The Economist, 7 January 2017, pp49-50

Maltesers launches braille campaign

Maltesers' Paralympic Games campaign was its most successful advertising for eight years, not just in terms of conversions – brand sales were growing at the rate of 10% at the end of last year – but in relation to promoting diversity within the marketing industry. Now the brand has launched a bus stop poster consisting of Maltesers arranged as braille writing. It tells the story of a blind lady at a bus stop who gets on a fire engine instead of a bus.

marketingweek.com, 4 January 2017; The Grocer, 7 January 2017, p39

Foraging Fox – beetroot ketchup

This article looks at how the founders of start-up, Foraging Fox, disrupted the £6 billion global ketchup market. They did this mainly by replacing tomatoes with beetroot and apple as the main ingredients. The article describes how the business has expanded from a food fair in London to department stores, such as Harrods and Selfridges, and is now investigating overseas opportunities.

businesszone.co.uk, 5 January 2017

Household

Tesco tackles sexist pricing

Tesco has reduced the cost of a pack of five women's twin-bladed razors from £1 to 50p. The cost of the equivalent male product is £1 for a pack of ten. This follows an investigation by *The Times* which revealed that shops are charging women up to twice as much as men for equivalent products. It discovered that products for women were 37% more expensive on average. The investigation found the greatest differences in pricing at Morrisons, followed by Sainsbury's, Tesco and Asda. Waitrose, on the other hand, markets its products in a "gender-neutral" way.

The Times, 3 January 2017, p7; The Guardian, 2 January 2017, p10

Tobacco

Vaping drugs

Nicotine isn't the only substance that people are vaping in e-cigarettes. Vapers have been using recreational drugs by mixing them in with the e-liquid. This has led to an increase in the number of drug-based e-liquids advertised on the dark web by marketplaces such as Alphabay. Michelle Pierce of Virginia Commonwealth University is leader of a project that aims to educate the public and provide information for law enforcement, medics and forensic scientists. Although there are public health

concerns, vaping could also have medical applications if the pharma industry could work out how to deliver therapeutic solutions in the future.

New Scientist, 17-31 December 2016, p21

Government and public sector

The over-90s – a grey area

There are no official figures for the number of people over the age of 90 in England and Wales, according to the Office for National Statistics. It compared three estimates which varied to the tune of 46,000, almost a tenth of the official total. Numbers vary from 457,792 to 504,030 but it would be useful to have a more accurate figure to help with planning health and social care.

The Economist, 17 December 2016, p28

British Army – getting personal

The British Army's latest campaign, *This is Belonging*, focuses on emotional needs and personalised messaging. Late last year a *Daily Telegraph* report revealed that the Army is having trouble recruiting and that the number of regular soldiers has fallen below 80,000. As well as TV and online ads that showcase real stories, the campaign includes social and digital initiatives offering tailored messages such as "doing something that matters", "facing challenges" or "feeling proud".

marketingweek.com, 9 January 2017

App does away with the marking pen

A new smartphone app allows teachers to replace the red marketing pen with a video or audio recording of themselves making comments as they mark a pupil's work. The app, which was produced by British tech company, Firefly Learning, forms part of its online learning platform which is already used in 500 schools. The global edtech market is predicted to grow by 17% a year to reach \$252 billion by 2020.

The Times, 9 January 2017, p38

Health and pharmaceuticals

Outsourcing to private suppliers

The number of bids for NHS work from private companies rose by 14% for the year to August 2016, year-on-year, according to research for the *FT*. The annual value of work advertised by the NHS rose to £5.9 billion. Meanwhile there was a trend towards smaller and medium-sized deals last year, with the value of clinical outsourcing tenders rising by just 3%. Use of the private sector is at its greatest in community and mental health, which makes up around half of NHS deals put out to tender.

Financial Times, 3 January 2017, p17

NHS to test AI system

At the end of January the NHS is to trial an artificial intelligence app as an alternative solution to its NHS 111 helpline. Residents in some north London boroughs will use the app to type in their symptoms and decide how urgent their condition is. The NHS 111 helpline has been criticised for being ineffective and sending too many people to A&E. The new app has been developed by Babylon, a start-up, which is already used by 500,000 people around the world.

Financial Times, 5 January 2017, p3

Breakfast – a sweet beginning

An analysis of dietary data by Public Health England reveals that children in England have consumed their recommended daily sugar intake by the time they get to school. It claims that children take in an average of 11g of sugar (three cubes of sugar) at breakfast just by consuming cereals, spreads and drinks.

New Scientist, 7 January 2017, p7

IT and telecoms

Social assistants

Voice-activated assistants, such as Amazon Echo's Alexa, help to facilitate routine tasks. But the way in which people are interacting with their devices is beginning to change and a more complex relationship between man and machine is developing. According to Daren Gill, director of product management for Amazon Echo, thousands of people try to engage Alexa on a social level, such as saying "Good morning" while more than 250,000 have proposed to her. The most common expression is "thank you" which suggests that people feel the need to be polite. The way in which people treat their voice-activated assistants will influence the way in which more advanced technology is designed in the future...

New Scientist, 17-31 December 2016, pp16-17

App Store boosts Apple revenues

iPhone sales may be slowing but Apple's App Store has benefited from a 40% increase in spending, driven by games such as *Pokémon Go* and *Super Mario Run*. Apple has been focusing on revenues from online services such as App Store, iCloud and Apple Music to offset concerns over a decline in unit sales of the iPhone. Despite this, the number of people who own or use an Apple device is still growing.

Financial Times, 6 January 2017, p13

Consortium attacks UK spectrum dominance

A consortium of telecoms companies, including Three UK, TalkTalk and the Federation of Communication Services, has launched the *Make the Air Fair* campaign. It wants UK regulator, Ofcom, to

ensure that no one mobile network can own more than 30% of available spectrum. In particular it is targeting BT and Vodafone which together own nearly 75% of the UK's mobile frequency. This, according to the campaign, means that consumers face rising prices and poor coverage. CEO of Three UK, Dave Dyson, says that the UK's mobile market "is broken" and should "be leading and not lagging almost all other developed countries".

Mobile Europe, December 2016, p7

Connecting devices – one step at a time

Wearable technology, such as smartwatches, could use a person's gait (the way they move) to help them pair securely with other devices on the person. A team at Aalto University in Finland used a technique called "fuzzy" cryptography to create gait "fingerprints" which could be used to connect wearable devices automatically without the need for a password or other security. The method is described as comparable to face or voice recognition but not as secure as iris or fingerprint scanning.

New Scientist, 7 January 2017, p19

The end of the smartphone revolution?

The first iPhone was unveiled by Steve Jobs in 2007 but now the smartphone frenzy is beginning to fizzle out. The number of people buying them for the first time is tailing off and market saturation is setting in as established smartphone owners are less inclined to upgrade. Growth has tended to be at the bottom of the market with the spread of cheap, high quality phones manufactured in China and India. To stay in the game manufacturers will have to make their new models significantly better than the previous ones or enter new markets, such as the "internet of things".

The Daily Telegraph (Business), 8 January 2017, p5

Leisure and tourism

The DNA boot camp

Fitness boot camps are commonplace but the DNA boot camp is an emerging trend. With 38 Degrees North's version, it is necessary to send off a saliva swab so that a person's DNA profile can be tested prior to arrival at the camp. By identifying markers in the DNA, the boot camp instructors will be able to determine the types of exercise and diet that are most suited to the participant.

Wired, January-February 2017, pp72-73

Hotel brands increase footprint Africa

Africa's tourism potential has attracted new investors, particularly well-known hotel brands, such as Hilton Worldwide and Marriot. Hilton has announced new hotels in three African countries – Ghana, Kenya and Nigeria – with the aim of increasing its portfolio from 39 to 80 hotels. Marriot is developing properties in Johannesburg and Cape

Town as it seeks to have a presence in 27 African countries.

Strategic Marketing Africa, Issue 4 2016, p56

Gym sector getting fit again

It is that time of year again – Britons are joining gyms to help them work off the results of seasonal over-eating. Humphrey Cobbold, Chief Executive of PureGym, predicts that memberships will rise between 10% and 20% in January compared with the average month. This trend is likely to apply across the sector, from low-cost to premium gym operators. After experiencing a flattening out, the UK health and fitness market has started to expand again, driven by low-cost chains such as PureGym and the Gym Group.

Financial Times, 3 January 2017, p17

Bots – battle for the secondary ticket market

Tickets for high-demand events tend to get snapped up by “ticket bots” and then sold in the secondary market. Bots jump the queue at sites such as Ticketmaster and acquire tickets before real people have a chance to do so. In December President Obama introduced legislation, the Better Ticket Sales Act, aimed at helping to eliminate bots. Experts say that bots harm the entire music industry, but the secondary market is worth \$8 billion worldwide and federal law enforcement struggle to tackle bot operators outside the US. Last year bots tried to buy five billion tickets on Ticketmaster at the rate of 10,000 a minute.

The Economist, 7 January 2017, p35

Materials and mining

ASA bans Friends of Earth leaflet

The Advertising Standards Authority has told Friends of the Earth to withdraw an anti-fracking leaflet because it could not back up its claims. These included the accusation that 25% of chemicals used in fracking could cause cancer and that fracking could increase the risk of asthma as well as depressing house prices. Cuadrilla, the company leading the fracking movement in the UK, has called the claims “scaremongering” but Friends of the Earth vows to continue campaigning against the drilling.

Financial Times, 4 January 2017, pp1,3

Lithium

Lithium-ion batteries are used in smartphones, laptops and electric cars. Companies, especially in China, are desperate to gain supplies of the metal and prices rose by 60% last year. Demand is expected to rise by 16% a year, from 175,000 tonnes in 2015, to 775,000 in 2025 when a shortfall of 100,000 tonnes is predicted. The market is dominated by four producers and lithium is not straightforward to mine so smaller producers can

expect to face technical difficulties and a long lead time between initial exploration and commercial production.

Financial Times, 6 January 2017, p24

Media

Books

Physical book sales turn a page

Last year 195m printed books were sold in the UK, up by 4.9% on the previous year. Strong sales are in part attributed to Harry Potter titles – *Fantastic Beasts and Where to Find Them* and *Harry Potter and the Cursed Child* – which were not issued as e-books. Meanwhile audiobook sales rose by 25% in a market worth £100m. Tom Tivnan of *The Bookseller* believes that “millennials prefer to read for pleasure in print” and that “There’s going to be a dedicated space for physical books for a long time to come”.

The Times, 6 January 2017, p17

The outlook for 2017

In this article publishers, trade bodies, retailers and authors give their opinions on what 2017 has in store for the book industry. Overall there is a positive outlook for print book sales while opportunities for the trade include rising export sales due to the lower value of the Pound; consumer demand to read “deeper” non-fiction books; and a continuing rise in sales of audiobooks.

The Bookseller, 6 January 2017, pp8-9

Film

Film and TV streaming sales overtake DVD

Sales of films and TV shows via streaming and downloads have overtaken those of DVDs and Blu-ray discs for the first time thanks to the popularity of services such as Netflix and Amazon. Revenues from digital downloads, streams and subscriptions for TV and film grew by 23% to £1.3 billion last year. Sales of DVDs and Blu-ray discs fell by 17% to £894m.

The Guardian, 5 January 2017, p25

Games

AI – into the real world

This year the University of Essex is to use artificial intelligence in a series of robot challenges, starting with remote-controlled cars. The university’s robotic games lab has been hosting the General Video Games AI competition (sponsored by Google’s DeepMind) for the past three years. It encourages research teams to develop intelligent systems that can tackle a variety of video games. The latest concept moves out of the simulated environment and into the real world with the aim of using robot games to develop AI systems with more general capabilities. Plans for the future include an aerial event in which AIs control drones.

New Scientist, 7 January 2017, p14

Internet

Discrimination in online marketplaces

Online marketplaces, such as eBay, Uber or Airbnb, could help to reduce racial, gender and other types of discrimination. Online listings, once relatively anonymous, have gradually developed to include photos, names and other data, which have allowed prejudices to emerge. The answer to the problem could rest with better platform design, according to the authors, who have developed a framework for creating a marketplace which reduces the risk of discrimination. They examine four designs and consider questions that designers should be asking themselves. Designers should be open to experimentation because even small design features can have a big impact on prejudicial behaviour.

Harvard Business Review, December 2016, pp88-95 (Fisman and Luca)

Music

Vinyl sales achieve 25-year record

Sales of vinyl records reached 3.2m last year, up by 53% on the previous year – their highest sales for 25 years. David Bowie's *Blackstar* sold the most, with more than double the sales of Adele's 2015 bestseller album, *25*. Vinyl makes up just 2.6% of the overall music market but has benefited from nine consecutive years of growth while sales of CDs and downloads both fell last year. Strangely, 48% of those surveyed in a BBC/ICM poll said they did not play the vinyl they purchased while 7% said they didn't even own a turntable!

bbc.co.uk/news, 3 January 2017

Newspapers

Murdoch newspapers

Rupert Murdoch's UK newspaper group, which owns *The Sun* and *The Times*, has reported losses and a fall in advertising revenues. News Group Newspapers, which owns *The Sun*, suffered a pre-tax loss of £62.8m for the year to 3 July while Times Newspapers Ltd has sustained a pre-tax loss of £5m. Rebecca Brooks, who was questioned over the phone-hacking scandal, has been reorganising Murdoch's UK newspapers and created a joint advertising sales operation. She was also responsible for axing *The Sun's* digital paywall which has led to a significant rise in online audience numbers.

Financial Times, 6 January 2017, p17

Battle over press regulation

As well as struggling with declining advertising revenues and competition from the likes of Google and Facebook, the UK newspaper industry is facing a threat in the form of section 40 of the Crime and Courts Act. Section 40, which was one of the main outcomes of Lord Justice Leveson's 2012 report on the practices and ethics of the British press, would require newspapers to sign up to an independent

regulator or be forced to pay the legal costs of both sides of a case.

Financial Times, 9 January 2017, p2

Social media

Instagram celebs – breaking the law?

In August the UK Competition and Markets Authority (CMA) published an open letter aimed at social media personalities and marketing companies, stating that they should ensure that people could distinguish between unbiased opinion and paid-for advertising. It warned that breaking the rules could result in civil or criminal action, a message that appears to have gone unheeded. Instagram, with over 14m UK users, is packed with photos of designer goods and holiday reports posted by celebrities, with no indication that the content constitutes advertising. This article names some of the celebrities who have allegedly been promoting brands. It cites a survey in which three quarters of marketers said they expected celebrities to take part in brand campaigns in exchange for products or credit.

The Times, 2 January 2017, p9

Packaging

Food packaging may help cut emissions

Global food waste damages the environment because of the resources required to produce food that doesn't get consumed. Under its Sustainable Development Goals, the UN aims to halve food waste by shops and households by 2030. The answer, ironically, may lie in packaging: for example vacuum-packaging means that meat can stay on shelves for longer, while resealable packaging keeps dairy products fresher for longer which should mean fewer trips to the shops. Yet many rich-world supermarkets have been trying to reduce packaging because it is perceived as wasteful. The adoption of more efficient packaging, such as vacuum-packaging, in rich economies could encourage developing economies to follow suit.

The Economist, 17 December 2016, pp60-61

Retailing

Location, location, location

For years shops have been using laser beams to count footfall but the tracking of customers' movements inside the store has been a recent development. Tracking technologies take advantage of smartphone ownership – the market for tracking phones indoors is predicted to rise fivefold by 2021 to reach \$23 billion. Around 200,000 stores around the world have systems in place, including Wi-Fi, to track phones. Wi-Fi terms and conditions often allow stores to view a shopper's online search history as well as to locate the person. This enables retailers to target personalised ads to customers' phones.

Google and Apple have been building up their expertise in indoor-location services.

The Economist, 24 December 2016-6 January 2017, p85

Consumer spending strong online

Figures from Visa show that consumer spending increased by 2.6% in December, year-on-year. The final quarter of 2016 was the fastest-growing in two years. However, much of this growth took place on the internet with online sales rising by 5.5% over the Christmas period. The hotel, restaurant and bar sector benefited the most, with spending up by 7.3%. In contrast, clothing and footwear suffered a 1.1% fall in December. Last week clothing retailer, Next, reported a weaker-than-expected Christmas period and downgraded its profit forecast.

The Times, 9 January 2017, p39; The Daily Telegraph (Business), 9 January 2017, p3

Aldi to be top-paying supermarket

From February Aldi is to give over 3,000 staff a pay rise which will make it the highest-paying supermarket in the UK. As well as matching or exceeding the voluntary minimum wage suggested by the Living Wage Foundation, Aldi is to offer graduates straight out of university £42,000, which is higher than graduate salaries offered by the likes of M&S or the Bank of England.

The Guardian, 6 January 2017, p25

Services

Associations – educating society

Associations should be doing more to influence the future of education, according to a new white paper, *The Association Role in the New Education Paradigm*. It argues that associations should remove their “membership blinkers” and think about what they could do to solve the wider problem of education. The report looks at ways in which associations can take a more prominent role in education and start treating it “as a more strategic part of their value proposition”. The paper sets out seven strategic steps for associations that want to provide work-related education, not just for students but for the wider society.

Association Meetings International, December 2016, pp18-19 (Lancaster)

Venture capitalism

After watching the film, *The Social Network*, Harry Stebbings (then aged 13) identified an opportunity. He created *The Twenty Minute VC* podcast which now averages 100,000 downloads a week and boasts some of the most prominent venture capitalists among its audience. The podcast makes enough money from sponsorship to employ four contractors, who help VCs to promote their brands on social media. Stebbings himself has been hired

by Atomico, a London-based investment fund, as an investor.

Wired, January-February 2017, p40

Airbnb enforces 90-day limit in London

This year Airbnb will introduce the 90-night limit for renting out whole homes in London. Airbnb is being forced to conform to regulation around the world, especially in cities where there are concerns that its popularity reduces the supply of long-term rentals. In London it is estimated that around half the nights booked on Airbnb in 2017 could be threatened by the 90-day limit. Separately an *FT* investigation has revealed that around a third of the savings offered by Airbnb to travellers derives from the tax advantages attached to its business model.

Financial Times, 3 January 2017, pp1,15

Transport and travel

UK aerospace fears completion with Brexit

UK aerospace companies, such as Boeing and Airbus, are enjoying record levels of work. Last year the sector grew by 6.5% to £31 billion, with 87% of this being exported. However, uncertainty over Brexit has led to fears that other parts of Europe may challenge the UK's position. The UK is already falling behind its EU competitors in relation to infrastructure that supports the development of design and technology, according to the Aerospace Technology Institute. Access to skilled labour and delays at borders are among the other concerns associated with Brexit.

Financial Times, 5 January 2016, p3

Luxury boats benefit from Brexit-Britain

At the London Boat Show yacht companies have been thanking the Brexit vote and the lower value of the Pound for sales which rose by as much as 50% in the second half of 2016. Sunseeker, whose boats have featured in James Bond films, says its forward order book is 40% higher because of the fall in the Pound. Fairline Yachts, which was bought out of administration just 12 months ago, has sold 66 boats in 2016 thanks to “aggressive marketing” of “Brexit-Britain” boats.

The Guardian, 7 January 2017, p24

Driverless cars – manufacturers wary

This year Audi will produce the first cars which allow drivers to take their hands off the wheel for an extended period. Audi, together with other carmakers, have been showing off their latest driverless technologies at the Consumer Electronics Show in Las Vegas. However, they are concerned about promising too much. Carlos Ghosn, chief executive of Nissan and Renault and a sceptic of driverless technology, warns that sensors are still not accurate enough and processors not powerful enough for so-called level three cars, which let drivers abandon the wheel to the car's computer.

Financial Times, 9 January 2017, p18

Written by CIM's Knowledge Services Team

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On the Move

Name	From	To	New title	Source
Becky Brock	Snow & Rock Group	John Lewis	Marketing Director	marketingweek.com
John Coventry	change.org	GoFundMe	Head of UK Communications	thirdsector.co.uk
Polly Curtis	The Guardian	British Red Cross	Director of Media	thirdsector.co.uk
Stefano Hesse	Facebook	Aviva	Global Digital Comms Director	PR Week
Tim Singleton	ITV News	Department for International Development	Director of Comms	PR Week
Hannah Solanki	Various	Your Event Solutions	Senior Business Development Manager	meetpie.com
Thom Thorp	Lilly	National Grid	TK Corporate Affairs Director	PR Week

Promotions

Name	Company	Previous title	New title	Source
Carol Potter	Edelman	Executive Vice Chairman of APAC, Middle East and Africa	President and CEO of Europe and CIS Region	PR Week

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www.dmcommission.com

The Economist*

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www.farmingfutures.org.uk

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www.fginsight.com

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

www.lexology.com

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Marketing Africa

Marketing Theory

www.marketingweek.co.uk

Market Leader

www.mckinsey.com

Mobile Europe

New Scientist** (1 month embargo)

PR Week

Public Relations Tactics**

www.research-live.com

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www.utilityweek.co.uk

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