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How Do Emerging Countries Influence the Advertising World of Tomorrow?

An Analysis of Last Year's Cannes International Festival of Creativity

Verfasser Henrike Runge, Florian Botzenhardt, Hans-Michael Ferdinand

ZUSAMENFASSUNG

Das internationale Werbefestival in Cannes ist einer der wichtigsten internationalen Gradmesser für kreative Werbung. In den letzten Jahren ist eine Zunahme sowohl an Einreichungen als auch an Gewinnern auszumachen, die ihren Ursprung in Schwellen- und Entwicklungsländern haben, was insbesondere unter dem Gesichtspunkt verwundert, dass die dortigen Werbebudgets im Vergleich zu den Budgets innerhalb den Ländern der ersten Welt in der Regel erheblich geringer ausfallen. Der vorliegende Artikel analysiert die Erfolgsfaktoren und leitet ab, wie sich diese durch die deutsche Marketingbranche nutzbar machen lassen.

The advertising world is changing constantly. Growth of the traditional powerhouses like the United States, United Kingdom, Western Europe and Japan is decreasing since 2007. "The emerging world begins to seize the lion's share of global markets. [...] The combined output of the emerging world accounted for 38 % of world GDP (at market exchange rates) in 2010, twice its share in 1990. If GDP is instead measured at purchasing-power parity, emerging economies overtook the developed world in 2008 and are likely to reach 54 % of world GDP this year" (The Economist online 2011). Emerging markets are the fastest growing consumer markets

and the best hope for multinational companies" future profits. In mobile consumption they already account for over 50 % of the market share. And more than three fourths of the world population lives in emerging countries.

This shift can also be seen at this year's Cannes Lions Festival of Creativity. According to the Cannes Festival webpage more and more clients at the festival are originating from emerging countries while the number of judges from these countries increases simultaneously. Brazil and Argentina were ranked the number four and five countries this year while

they did not make it into the top ten in the year 2010 (Horizont 2011, p. 22).

At the Cannes Creative Academy for Young Marketers half of the students are coming from emerging countries. Furthermore there is a consistent trend: New countries are entering the challenge of the Cannes Festival for the first time and winning Lions. Three winners this year are from Romania, South Korea and China, countries that have not won a Grand Prix at Cannes before. So it is not surprising that in Cannes you can hear marketers talking about a shift in geography of good ideas.

The prediction for the future is that even more emerging countries will participate and possibly overtake the traditional powerhouses soon. One reason for this development may originate in the progress of technologies like the modern Internet, which allow smaller countries with smaller marketing budgets to bring amazing ideas to life. Being creative and winning at the Cannes Festival does not necessarily rely on big budgets anymore.

As a marketer it is important to have a sound grasp of contemporary developments, know current trends and try to draw conclusions about future needs in order to satisfy the demand and increase the share of wallet in order to stay competitively viable. "And there's no doubt that Cannes is incredibly influential. The creative reputation of not just an agency, but an entire country can be boosted by a good run at Cannes" (Tungater 2008, p. 248).

Cannes is not only about entertaining advertising anymore, it has matured. Today it is about groundbreaking communication and an interdisciplinary exchange between creative folks (Horizont 2011, p. 22). With an increasing importance of emerging countries at the Cannes Festival and their success despite small budgets, the following article addresses the question: "How do emerging countries influence the advertising world of tomorrow?" which will be answered by analyzing the Cannes Festival of 2011.

Theoretical Framework

The basis of the data to answer the research question are newspaper and magazine articles, literature, the Cannes Festival webpage, videos on the Cannes Festival webpage, YouTube and the "Cannes Rolle" which can be bought on DVD. The question will be answered following both a quantitative and a qualitative approach including qualitative content analysis. The sources are analyzed separately in context of the research question and brought together in the analytical part of the investigation, divided into three topics:

1. How often do emerging countries win at the Cannes Festival?
2. What do emerging countries win at the Cannes Festival and how?
3. How do emerging markets influence the advertising world?

The History of Cannes

The origins of the Cannes International Film Festival can be dated back to the late 1940s, when a festival was introduced to give advertising films their own stage. "The lion of Piazza San Marcos" was debuted 1954 in Venice (Nudd 2011a). In 1955 the Festival moved to Monte Carlo and in 1956 to Cannes. From there it alternated between Venice and Cannes until 1984. Since 1984 the Festival only takes place in Cannes, but kept the lion as a symbol. Since the 1990s the festival also offers seminars and it expanded beyond film. These days the Festival is "run by the British publisher and events organizer EMAP" (Tungater 2008, p. 224), who bought the Festival in 2004 from Roger Hatchuel. It is held every June for seven days. In 2011 there were 13 categories: Creative Effectiveness (since 2011), Cyber Lions, Design Lions, Direct Lions, Film Craft Lions, Film Lions, Media Lions, Outdoor Lions, PR Lions, Press Lions, Promo & Activation Lions, Radio Lions and Titanium and Integrated Lions. It had more than 24.000 works entered and 8.000 delegates serving as judges, from 90 countries (Nudd 2011a).

About Emerging Countries

According to Folsom (2004, p. 153) “emerging markets are economies that present high risk but also potentially high rates of growth; they have low per capita Gross Domestic Product (GDP).” Folsom (ibid.) uses the term “emerging markets” synonymously with the term “developing country” (“many developing countries are now referred to as emerging markets”), which is the new term for third world country. The Gabler (2011) encyclopedia on the other hand uses the term emerging country synonymously with newly industrializing country, meaning that the country is on its way to becoming an industrialized country. Due to high economic growth, large industrial progress can be observed and this trend is expected to continue in the future. On the downside, social indicators often can not keep up with the fast economic growth and social inequality increases.

Which Countries are Being Observed?

According to Andersen (2005, p. 23) there is no international uniformly determined list of emerging countries. The criteria used to determine whether a country is considered emerging or not vary from source to source. UNO, Worldbank or OECD for instance provide different rankings of emerging countries and there are more possible sources. Often more economic factors are considered rather than social indicators, as they are easier to access and measure.

But the trend goes towards including more social indicators. In scope of the present investigation the term emerging countries will include newly industrializing countries as well as developing countries. As these terms are sometimes used synonymously and boundaries are ambiguous, it is difficult to differentiate between the two. Countries belonging to those categories that have not played an important role at the festival in previous years but won a prize at the Cannes Festival 2011 will be taken into account. In a newspaper article about the Cannes Festival Klaassen (2011) outlines the U.S., U.K., Western Europe and Japan as the traditional powerhouses of the Cannes

Festival and China, Turkey, South Korea and Romania as emerging countries at the festival. By also considering the HDI (Human Development Index) of a study conducted by the United Nations Development Programme (UNDP) (2011, p. 128) South American, Asian, Eastern Europe and South Africa countries can be considered emerging countries as well.

The OECD (2008) refers to the BRIICS (Brazil, Russia, India, Indonesia, China, South Africa) countries as emerging economies. Also the “Grant Thornton emerging markets opportunity index 2010” lists similar countries. Watching the video clips of the Cannes Festival 2011 homepage leads to similar results. Cross referencing the different sources with the Cannes Festival winners and considering the research question a list of 28 countries can be determined in table 1.

How Often Do Emerging Countries Win at the Cannes Festival?

At the Cannes Festival in 2011 a total of 1.203 prizes out of 28.828 entries were awarded to both emerging and developed countries (Horizont 2011, p. 22). That makes it a winning rate of 4.17 percent. 50 different countries won a Lion. 56 percent of the 50 countries were emerging countries.

By looking at table 2 it can be seen that emerging countries won in 30 % of the cases (including Grands Prix, Gold Lions, Silver Lions and Bronze Lions) at the Cannes Festival, meaning one third of the Winners are from emerging countries. This is quite a significant number, considering the current state of the emerging countries in comparison to the well established, powerful Western Countries, like the USA or Germany.

In comparison the winning rate for emerging countries was 28 % in 2010 (281 prizes out of a total of 1,018)⁴. That makes it a 2 percent growth rate for the emerging countries in 2011; a small, but noticeable increase in the share of Lions. In two out of 13 categories, “Outdoor Lions” and “Press Lions”, they

1	Argentina	15	Mexico
2	Bahrain	16	Peru
3	Brazil	17	Poland
4	Chile	18	Puerto Rico
5	China	19	Romania
6	Colombia	20	Russia
7	Costa Rica	21	Serbia
8	Dominican Republic	22	United Arab Emirates
9	Guatemala	23	South Korea
10	Hong Kong	24	Thailand
11	India	25	The Phillippines
12	Indonesia	26	Tunisia
13	Lebanon	27	South Africa
14	Malaysia	28	Vietnam

Table 1: Countries which are observed in this study.

Source: Own representation

achieved more than 50 % of the prize share. With reaching percentages of 58 and 68 in these specific categories, their share of the total can be considered rather big. In six more categories the emerging countries were able to gain more than one quarter of the prize share plus they won prizes in all Cannes Festival categories with a minimum of two %.

One can draw the conclusion that in total the emerging countries are well represented among the whole Cannes Festival. In five out of the 13 categories, where the emerging countries had a prize share less than 25 %, namely the Creative Effectiveness Lions, Cyber Lions, Design Lions, Film Craft Lions and Titanium and Integrated Lions, there is a future opportunity of improvement and potential growth. Table 3 displays a list of the 12 Cannes Festival categories (without the category Creative Effectiveness, because of its inconsistency in prize levels) displaying the share of awards of the emerging countries throughout the different prize levels.

As it can be seen in table 3, the emerging countries' prize share varies between 28 and 43 %. They are well represented among all four prize levels (Bronze, Silver, Gold and Grand Prix). The share in Bronze is the lowest with 28 %. Inferentially when they win,

Categories	Emerging countries winning
Creative Effectiveness Lions	17%
Cyber Lions	2%
Design Lions	23%
Direct Lions	37%
Film Craft Lions	9%
Film Lions	29%
Media Lions	31%
Outdoor Lions	58%
PR Lions	26%
Press Lions	68%
Promo & Activation Lions	29%
Radio Lions	45%
Titanium and Integrated Lions	13%
Total	30%

Table 2: Share of emerging countries winning at Cannes

Own illustration based on own research

they exhibit a high quality and win in high prize levels, rather than in the Bronze prize level. On the other hand from an overall perspective the emerging countries could not quite keep up with the developed countries, although they did have the advantage in a few categories, the developed countries still obtained a bigger general prize share.

However the emerging countries are very close on the developed countries' heels, with a total of 43 percent in the Grand Prix prize level. That might indicate that the emerging and the developed countries are almost or even on a level playing field.

Looking at the list of emerging countries winning at the Cannes Festival one can see that the winners are mainly located in Latin America, Asia and Eastern Europe. Africa is also represented, but with a total of fewer prizes. However the biggest shares of awarded ads among the emerging countries are obtained by the South American countries Brazil and Argentina.

Emerging Countries in the Top Ten Country Ranking

As displayed in table 4, Brazil came in 4th, Argentina 5th place in the country valuation, while the USA

Categories	Grand Prix	Gold	Silver	Bronze	Total prizes
Cyber Lions	0%	0%	0%	5%	2%
Design Lions	0%	19%	25%	26%	23%
Direct Lions	100%	60%	33%	29%	37%
Film Craft Lions	0%	17%	0%	13%	9%
Film Lions	0%	25%	47%	20%	29%
Media Lions	100%	14%	26%	39%	31%
Outdoor Lions	0%	40%	72%	56%	58%
PR Lions	0%	20%	38%	20%	26%
Press Lions	100%	79%	78%	58%	68%
Promo & Activation Lions	100%	29%	29%	28%	29%
Radio Lions	100%	44%	46%	40%	45%
Titanium and Integrated Lions	16%	33%	33%	0%	13%
Total	43%	32%	36%	28%	30%

Table 3: Share of awards of the emerging countries throughout the different prize levels

Own illustration based on own research

kept their position, Germany and Great Britain traded their positions, because Great Britain lost its earlier advantage. Brazil came in 4th place for the second year in a row, but Argentina had not made it into the top ten in the previous year.

But what makes the Latin American countries so special and successful? Pointed out by Tungater (2008, p. 219) Latin American advertising “has a certain warmth and sensuality that the work produced by the droll Brits, the wisecracking Americans and the suave French often lacks”. The reason for their success might thus lie in their strength of selling a gut feeling rather than facts and figures. Addressing emotions of customers and delivering a good feeling with their ads, creating an atmosphere of secureness and happiness.

Looking at the two most successful emerging countries at the Cannes Festival as described by Tungater (2008, p. 223) Brazil produces “warm and witty advertising” which corresponds with the previous statement about Latin American advertising being characterized by humorous, playful and original content.

According to Olivetto (Olivetto 2008, p. 223), a superstar of Brazilian advertising, Brazilians’ success lies in being “a blend of many races and that makes us creative, sensual, musical, talented and good-hu-

moured”. Olivetto adds a cultural component to the success factors: the diversity of nationalities within the country. In his eyes the diversity of nationalities is associated with a diversity of ideas and creativity. Furthermore, according to his belief it makes them more emotional, warm and sensual people who therefore also have a bigger talent in music because they let themselves be guided by feelings.

Mazia (2008, p. 220), an Argentinean advertising agent, suggests the Argentinean success lies in the following: “For example, there is an ironic sense of humor, which contrasts with a strong love of sentimentality. I’d say it’s a blend of Spanish culture, Italian culture, American culture, and a melancholy sensibility that is often associated with the tango. I also think people admire the fact that we have Third World budgets, yet we manage to do First World advertising. Having to be creative on a small budget forces you to stretch your talent.” Mazia once again cites the Argentinean diversity and the Argentinean sense of humor as reasons for their success.

An article by Klaassen in the magazine Advertising Age deals with the same topic. She points out that “technology allows smaller countries with smaller marketing budgets to bring amazing ideas to life” (Klaassen 2011). Unlike Mazia, Klaassen comments that the development in technology is responsible for

Rank 2011	Rank 2010	Country	Grand Prix	Total Lions	Points
1	1	USA	7	141	707
2	3	Germany	0	79	361
3	2	United Kingdom	1	72	336
4	4	Brazil	0	67	273
5	-	Argentina	0	43	193
6	6	Australia	2	35	163
7	7	France	0	38	160
8	5	Sweden	0	30	137
9	9	Japan	0	26	126
10	10	Spain	0	28	114

Table 4: The top 10 participant countries at Cannes
Own illustration, source: Cannes International Festival of Creativity

the increasing success of emerging countries. In the past, creating good ads had cost countries a fortune, which led to a disadvantage for countries with small cash flows. In our days technology settles the differences, because due to the availability of the internet and modestly priced technology for taking high-quality photographs and videos, the prices for developing ads have decreased. It is now possible to come up with successful ads on smaller budgets, too.

On the other hand it is true that the overall winner of the Cannes Festival, the Nike ad “Write the future” by a Netherland advertising agency and a British production company, must have been a highly expensive ad because of the many famous sportsmen participating in the ad. In that sense the developed countries still do have an advantage as they have the big budgets, the opportunity to score via creativity and have the technology as well. Success of the emerging countries shows that they can often can balance out this disadvantage with soft skills, creativity and innovation which do not rely on big budgets. Also, there is a bright outlook for the future: If the emerging countries continue their growth as predicted, a trend towards bigger budgets over the next years might develop.

It seems like the reasons for the Brazilian and Argentinean success at the Cannes Festival and in advertising in general lies in the same characteristics: humor, sensuality, emotionality, diversity, warmth and creativity. Furthermore the Latin American countries

manage to create high quality products on small budgets, due to their talent and partly due to the use of technology, enabling them to provide good value for less money.

How do Emerging Markets Influence the Advertising World?

As stated by Wentz (2011) it “has been a remarkable week at the Cannes Lions International Festival of Creativity for emerging markets that are not usually big medal winners.” Countries like China, Romania and South Korea won their first Grand Prix at the Festival and moved into the centre of attention. Tungater (2008, p. 254) had predicted in 2008: “Driven by China and India, Asia-Pacific is expected to overtake Western Europe as the world’s second largest advertising market in the near future”.

Now, after the last Cannes Festival (2011) first indices can be seen. China “has been a quick learner” (Wentz 2011) and won its first Grand Prix and several other prizes. Also India and other Asian-Pacific countries competed with the traditional powerhouses. That means that regardless of the size of the specific advertising market, the quality of the advertising - at least from a first-world-perspective - increases rapidly. “Having been classed for more than a decade as an «emerging market», at least half of Eastern and Central Europe has now gone ahead and emerged, although ad spend is only a quarter of that of the West” (Tungater 2008, p. 250) as exemplified in Romania’s

advertising campaign for the chocolate bar ROM, creating a campaign on little resources.

For the ad “American ROM” Romania won two Grands Prix in the categories Direct Lion and Promo & Activation. The traditional chocolate bar ROM is packaged in the Romanian flag. Advertisers challenged the national pride of their target audience by replacing the packaging with an American flag, and executing a campaign in English. There was an immediate reaction, with Romanians starting Facebook pages, web pages, and flash mobs, with the response spilling over into “prime time TV shows and public events” resulting in 300.000 € worth of free media (Youtube ROM 2011). Sales increased by 79 % (ibid), making this an outstanding example of creativity and marketing effectiveness on a small budget.

Also other Eastern European countries like Poland participated and won prizes at the Cannes Festival. It is possible that the future advertising world takes the emerging countries as a role model and moves towards spending smaller budgets and rather focuses on good ideas as the competition increases even as advertising budgets have been consistently reduced in recent years. With a shift in the major markets new rules and mindsets will apply for a new marketing landscape. Other values may be relevant and superior. For instance the Latin mindset could have a bigger impact on future advertising and make the advertising landscape more humorous, idea focused, warm and emotional.

As commented in an Advertising Age article (2011), “One reason for the emergence of emerging markets is that, thanks to technology and a move toward ideas grounded in social and digital rather than TV, it simply doesn’t require a huge production and distribution budget to bring great work to life.” Free PR for instance makes it possible to gain a broad coverage regardless of the budget. Another reason is the accessibility of information. In our days information is accessible everywhere and for everyone mainly via digital channels. The competitive advantage of the developed countries is hence decreasing.

According to Paul Bulcke, CEO of Nestlé the emerging markets gained self confidence over the years, develop their own rules now and organize their future independently. They now stand up for themselves and they have an impact, as they grow fast. But emerging countries not only develop more and more successful advertising, they are also a high potential future target market: “Marketers are clearly paying more attention to the emerging markets that are increasingly their best customers” (Advertising Age 2011), making them attractive markets for first world advertising agencies. As a result marketers are keeping an eye open for future investments and strategic decisions. The tendency is to invest more into emerging markets as there might be a better return on investment in the future.

The emerging countries account for 56 % of the participating countries at the Cannes Festival. They had a total share of prizes of 30 %. In the categories Outdoor Lions and Press Lions they even had a bigger share than the developed countries. There was not one category in which the emerging markets could not score and win. Furthermore the emerging countries won five out of the 12 Grands Prix. In conclusion, the emerging countries are well represented throughout the entire Cannes Festival. The Cannes Lions winning list locates the emerging countries at the Cannes Festival mainly in Latin America, Asia and Eastern Europe. Africa is also represented, but with a total of fewer prizes. The Latin American countries’ success results from their humor, sensuality and emotionality. Instead of numbers and facts, they sell a good gut feeling, they sell emotions. One possible reason for this is that the cultural diversity may be one of their strengths and may allow stronger creativity. Also the emerging countries benefit from smaller budgets forcing the development of great ideas.

Another thing most of the successful emerging countries had in common was the usage of social media, free media and smart methods of how to involve customers and gain a broad coverage on small budgets. As it has been almost necessary in the past to have a high budget for good ads, in our days it is not

anymore. Technology and new, free media bring the emerging and developed countries closer together, and as a consequence developed countries lose their advantage. Budget is not the most important factor anymore when it comes to creating great ads; ideas, uniqueness and creativity are the key words. Everyone has access to the same technologies and the same information.

If the Cannes Festival is a good indicator for the advertising world, the top advertising countries might change over the next years as the barriers to competition are lowered. It is likely that the future advertising world takes its cue from the emerging countries to leverage social media and customer involvement to promote creative ideas on smaller budgets.



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