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SHIFT GLOBAL SURVEY

Prepared February 2006



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Objectives

Provide direction for SHIFT's new international PR service

- Targeting
- Key Messages

Provide research to support announcement of SHIFT's new international PR service

Methodology

On-line survey consisting of 34 questions from February 13, 2006 to February 16, 2006

Source of sample: e-Rewards panel Qualifying Criteria

1. Qualified respondent must be the person responsible for strategy and/or execution of Public Relations (preferably Global PR) for their company
2. Qualified respondent must be of similar title:
 - VP of Marketing
 - Marketing Communications Director
 - VP/Director/Manager of Corporate Communications
 - VP/Director/Manager of PR

NOTE about title: No more than 25% of overall sample may have title of “Manager”
3. Qualified respondent’s company must be manufacturers of technology for consumers or businesses in one of the following areas:
 - Software
 - Hardware
 - Gaming
 - Telecom
 - Consumer Electronics
4. Qualified respondent must be employed within a company of \$10MM+ in annual revenue

Sample Profile

113 Respondents

The qualification criteria resulted in sample more representative of directors & higher in charge of PR within larger companies:

- 78% were director level or higher
- Respondents were overwhelmingly from Marketing Departments
 - Of those in Marketing, a third indicated one of the multiple other functional areas as well (average = 2.6 other areas besides Marketing)
- 65% were in consumer related technology
- 39% of the companies had annual revenue over \$1-billion
 - 69% of the companies had annual revenue over \$100-million
- 50% derived more than 20% of their revenue from non-U.S. sources

See Appendix for details.

Key Findings

Two-thirds of companies with international PR programs said their programs were less than satisfactory.

Two-thirds of companies with international PR programs felt that both their international colleagues and their international agencies adhered to a single strategy less than most of the time.

Two-thirds of those with international PR programs believe the percent of their PR budget spent on international PR will increase in the next 12 to 24 months.

Roughly a third of those without an international PR program said it was at least somewhat likely that they would develop such a program within the next 12 months.

Overall, interest in the Coordination Network Model was moderate with the largest percentage saying they were somewhat interested and only 16% saying interested or very interested.

The largest group interested in the coordination network model are companies with an international PR program who get more than 35% of their revenue from outside the U.S. (15% of the sample).

Other factors related to interest in the Coordination Network Model:

- Belief that appointing a global liaison to manage communication is a strategy to insure adherence to a single strategy
- Having a manager dedicated to EMEA or AsiaPac, in particular, having both
- Having one or more non-U.S. PR agencies supporting their global PR efforts
- Having worked in the past with a global PR agency but not currently
- Using more than 2 external PR agencies

Key Findings (Continued)

Those interested in the Global Coordination Network Model are more likely to find the following important:

- As my organization grows I know a global agency can support me anywhere.
- Local agencies employ natives who know the culture inside out.
- A global coordinator ensures seamless communication across geographies and offices.

PR Department Profile

About half use more than two external PR agencies.

53% had international PR programs

- Respondents from companies with international programs typically were also involved with the domestic program

Asia Pacific, Western Europe and Canada lead in terms of regions where companies have PR programs in place.

Of those who have an international PR program, a little over half use non-U.S. PR agencies in support of their global PR efforts.

Annual PR budgets were higher than we anticipated:

- Median for companies without an international PR program was \$215-million
- Median for companies with an international PR program was \$349-million.

About a quarter of those with an international PR program currently use a global PR agency and another quarter have used a global agency in the past

A little over a quarter of those with an international PR program currently use an affiliate network agency and a little over a quarter have used an affiliate network in the past

39% of those with an international PR program have either an AsiaPac PR manager or an EMEA PR Manager; 19% have both.

For those with an international PR program, the median percentage of PR budgets spent on international PR was 17%; two-thirds believe this percentage will increase in the next 12 to 24 months.



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International PR Programs



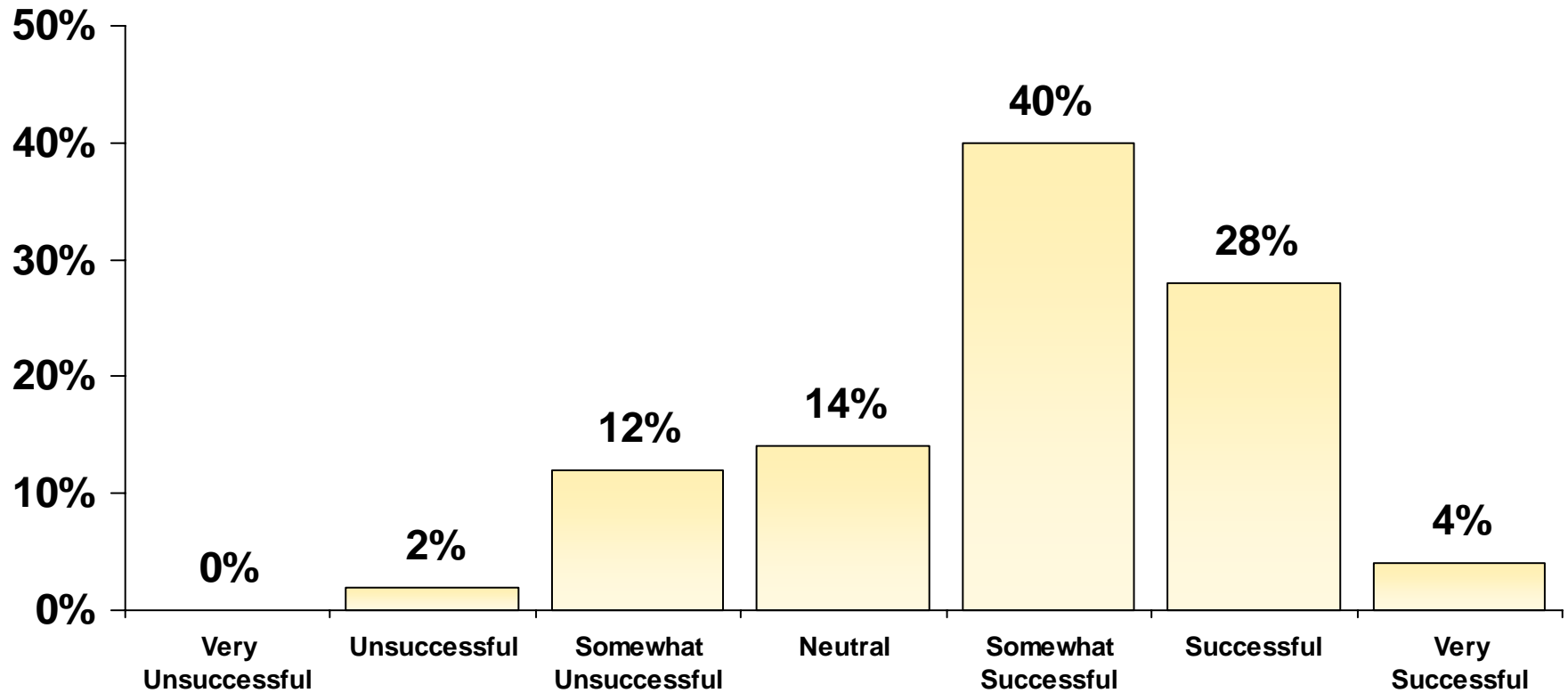
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Success Of International PR

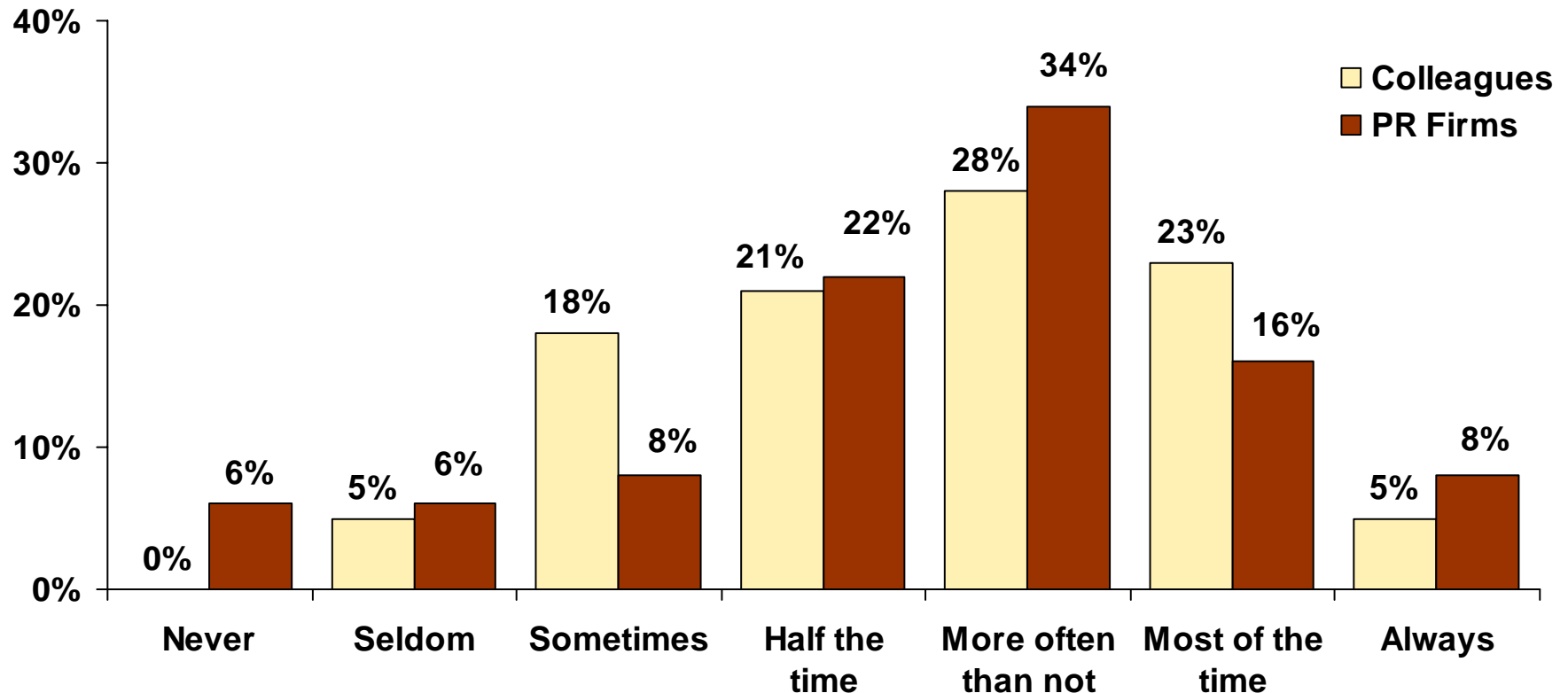
Respondents were remarkably honest about their international PR programs with two-thirds saying the programs were less than satisfactory.



International Team's Adherence To Strategy

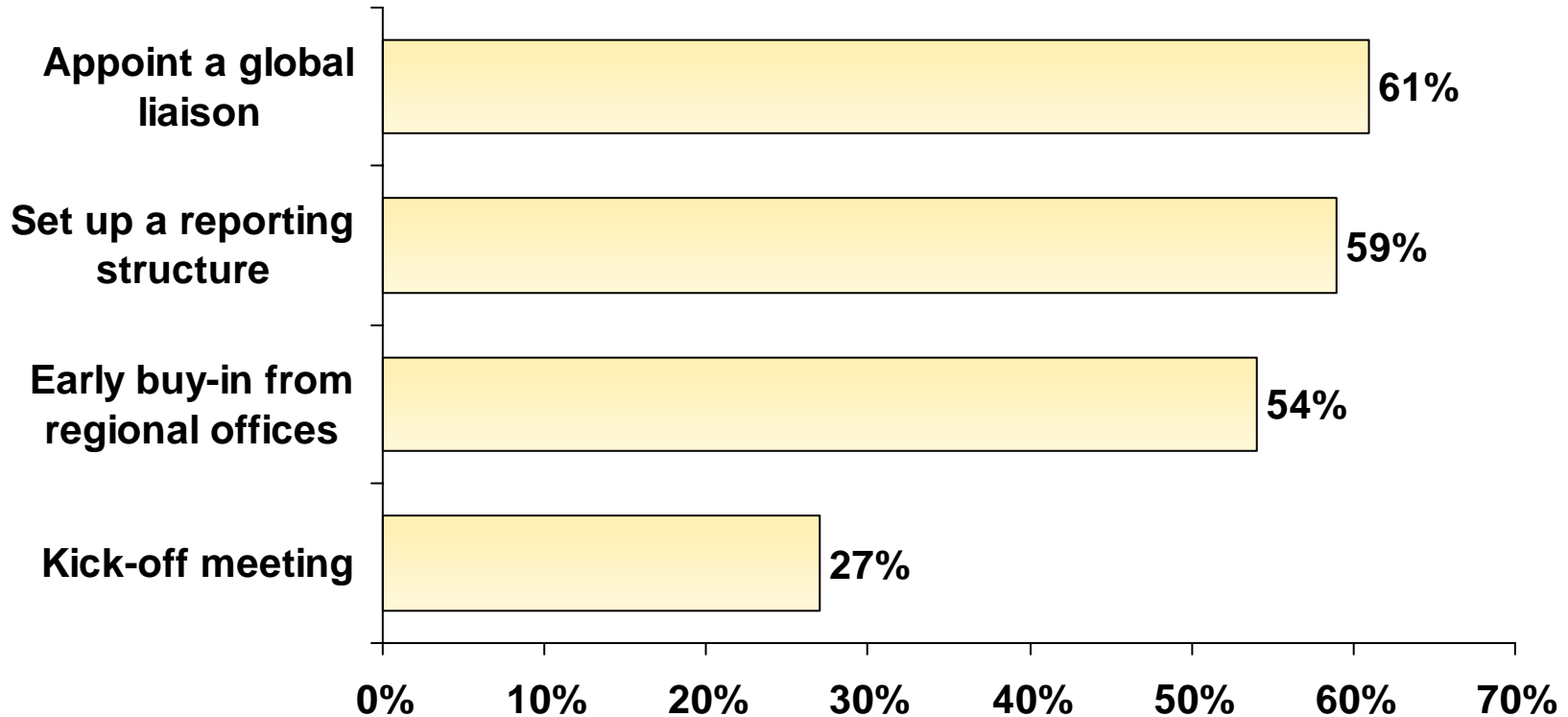
International PR colleagues and their PR agencies did not receive high marks on adhering to a single strategy but their grades were just about the same: two-thirds felt that both their international colleagues and their international agencies adhered to a single strategy less than most of the time.

Neither measure is correlated to interest in the coordination network model.



How To Insure Adherence To Strategy

A global liaison and reporting/workflow were seen as the best ways to insure that everybody adheres to a single strategy.



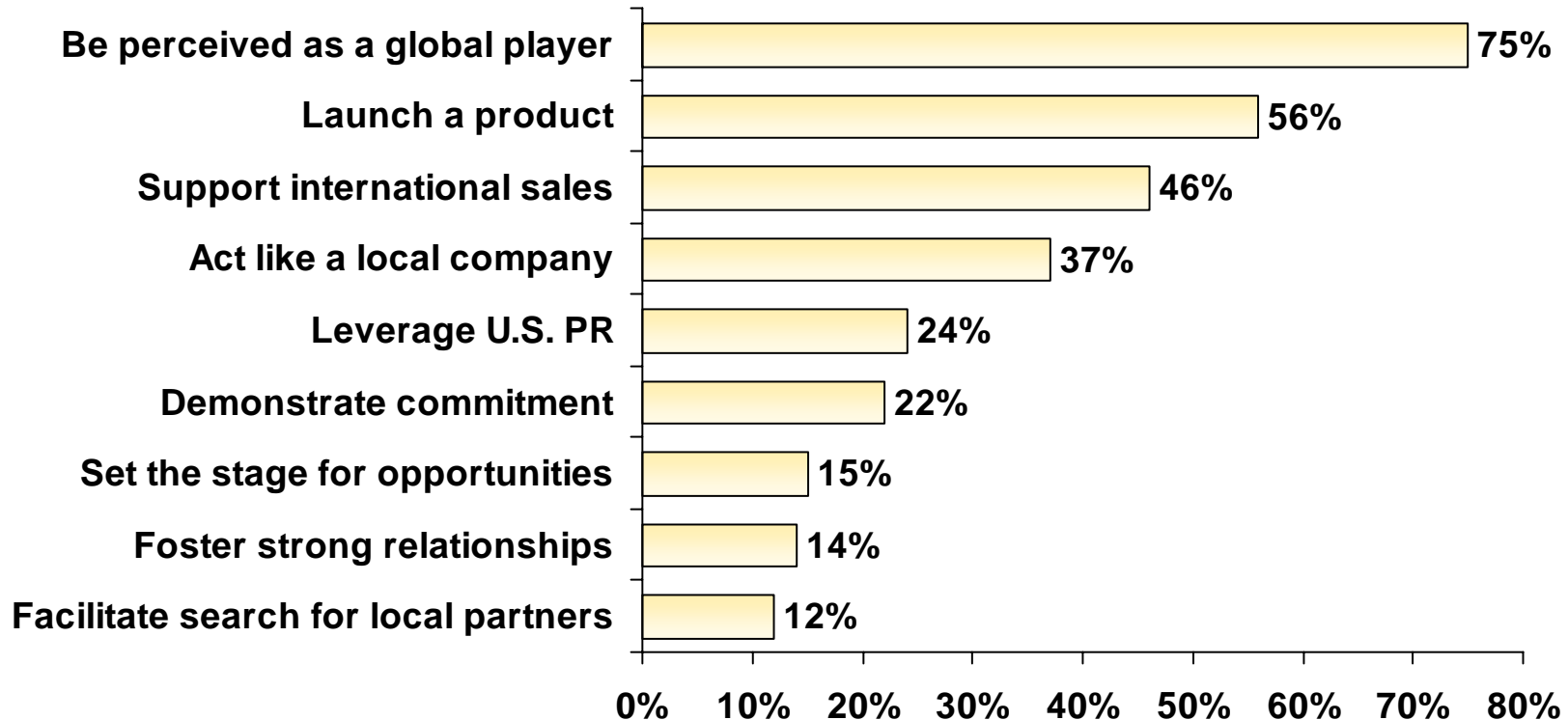
Goals of Global PR Program

To be perceived as a global player and strengthen our worldwide brand	Be perceived as a global player
To act like a local company with a strong presence in each region	Act like a local company
To launch a product or service in varied markets	Launch a product
To demonstrate the Company's commitment to local markets	Demonstrate commitment
To foster strong relationships with the regional media and business influencers	Foster strong relationships
To leverage our U.S. PR success in all the countries we do business in	Leverage U.S. PR
To support international sales campaigns and revenue growth	Support international sales
To facilitate the search for local resellers and partners	Facilitate search for local partners
To set the stage for future business opportunities and/or to secure investors	Set the stage for opportunities

NOTE: Goals presented to those without an international PR program were the same except in the conditional future.

Goals Of International PR

- The top goal of International PR is to be perceived as a global player; practical objectives, such launching a product or supporting international sales, come in second.
- About half of those who gave a “practical” objective also said they want to be perceived as a global player.



Unprompted: Changes Wanted In Global PR Program

14 Localization

- Add more in-country PR professionals
- Better definition of services and relation to area
- Concentrate on regional areas
- Create an infrastructure in local region as well as to improve coordination
- Increase ability to work with local experts
- Increased localization
- International presence on the ground
- More focus on regional analysts
- More localization
- More localized support
- PR-focused contacts in our overseas offices
- The addition of a staff member in the London office, or the ability to spend 6 months in London and 6 months in Atlanta and split time between the two offices
- To become more familiar with foreign ways of doing business
- Work closer with smaller PR firms in target countries

9 Budget/Resources

- Bigger budget
- Budget increase
- Cheaper
- Having more time and resources to dedicate to it
- Increase budget
- Increase international budget allocation
- Invest more money
- More money
- More resources to complete the strategy

Unprompted: Changes Wanted In Global PR Program (Continued)

4 Communication

- Better communication between regions
- Improved communication between regional offices and partners and head office
- Increase communication
- More consistent communication

4 More info

- Awareness of all publications within our industry
- Be able to get more data and competitive information from the overseas markets
- Greater understanding of PR considerations in international markets
- Information systems

3 Strategy

- Consolidate strategy with knowledgeable people in the drivers seat
- I would make goal-setting more clear
- Mesh structure and strategic approach

9 Other

2 Exposure

- More dedication to international exposure
- More exposure

2 Reach

- More reach
- Reach

2 Visit foreign offices

- Be able to visit all offices and officers to forge relationships in country
- More face to face time with the regional teams

3 Other

- Take more direct control
- Early involvement
- Loosen the restraints on multi-tiered PR efforts

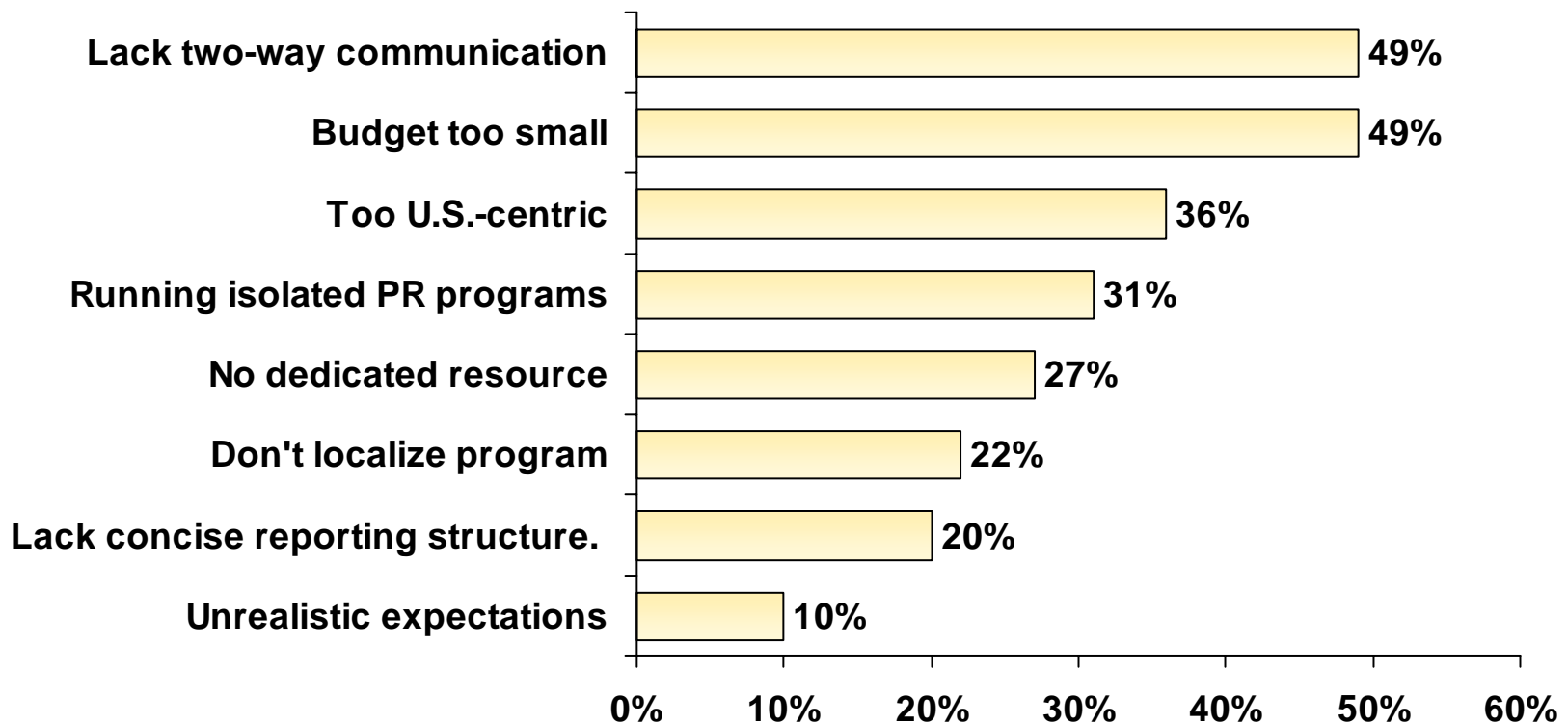
Hurdles To A Successful Global PR Program

The lack of two-way communication between regional offices and headquarters results in inconsistent messaging and branding.	Lack two-way communication
Our global PR is too US-centric and US-driven - there's no buy-in from the international subsidiaries.	Too US-centric
We lack a concise reporting structure, consistent workflow and a clear division of labor between central (U.S.) and local (international) PR staff.	Lack concise reporting structure.
We're running isolated PR programs - there's no cross-fertilization between the agencies.	Running isolated PR programs
We don't have a resource dedicated to global coordination to hold it all together.	No dedicated resource
Our budget for international PR is too small to make an impact.	Budget too small
We translate PR collateral but don't really localize our program to ensure regional impact.	Don't localize program
Our Top Management's goals and expectations for global PR are unrealistic.	Unrealistic expectations

NOTE: Hurdles presented to those without an international PR program were the same except in the conditional future.

Hurdles To A Successful Global PR Program Of Those With A Program

Lack of two-way communication between regional offices and headquarters that results in inconsistent messaging and branding tied with inadequate budget as the major hurdles to a successful global PR program perceived by those with an international PR program.





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International PR For Those Without A Program



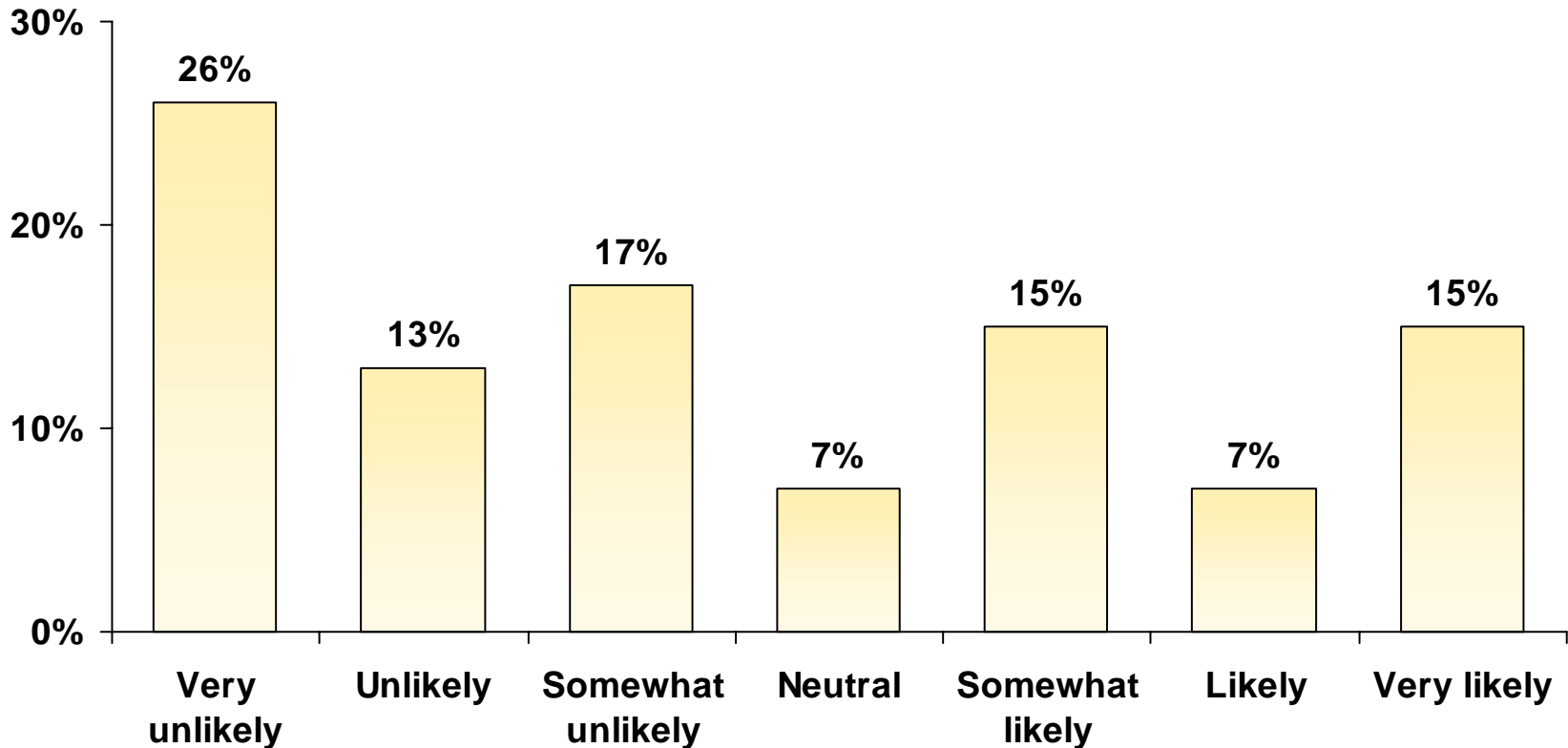
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Likelihood Of Developing An International PR Program

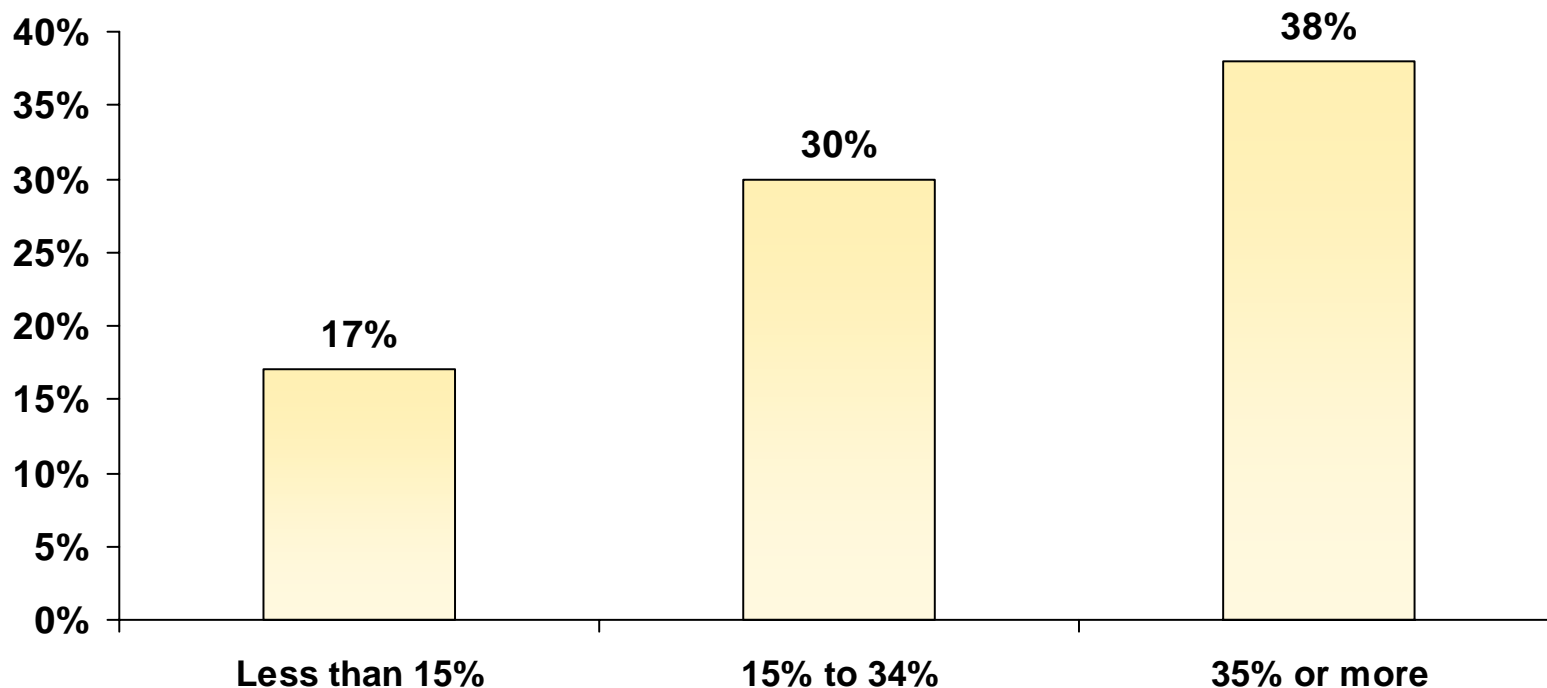
Roughly a third of those without an international PR program said it was at least somewhat likely that they would develop such a program within the next 12 months.



Percent Of Revenue From Out Of US And Likelihood To Develop International Program

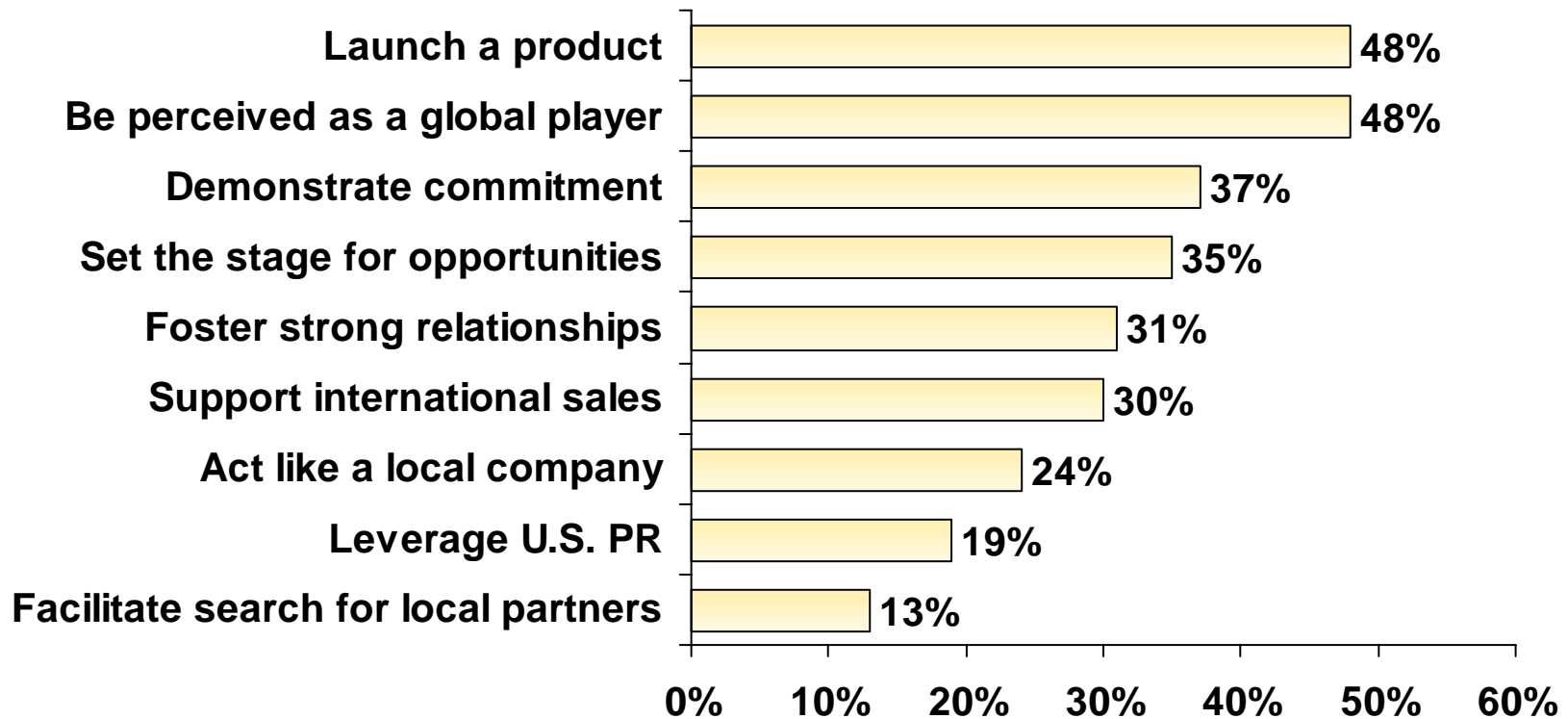
Among those who do not currently have an international PR program, the percent of revenue derived from non-U.S. sources strongly impacts the likelihood of developing such a program in the next 12 months.

Percent Likely to Develop Program



Anticipated Goals Of International PR Of Those Without Current Program

To be perceived as a global player and to launch a product or service were the top goals respondents who do not currently have an international PR program thought would be the primary goals of such a program.



Unprompted: Concerns About Trying To Coordinate Global PR Program

15 Localizing

- Add more in-country PR professionals
- What works in the US doesn't always translate into success in other areas. You can't just duplicate materials and goals; it all has to be tailored to the perceptions and beliefs of each new area.
- Nuances of cultural differences
- Not enough geo-centricity and the focus being too global with messaging being directed out of the US.
- Local mores
- Local market customs
- Language differences and local priorities
- Language barriers
- Language barriers
- Dilution of message, lack of local relevance
- Differing business practices, languages, media types
- Cultural issues
- Cultural differences
- Cultural and legal differences, cost
- Brand and category dynamics from one region to another
- Alignment with other countries or markets

9 Resources

- Time
- Spreading ourselves too thin
- Resources
- Our limited service area and company size
- I think we would need to expand the department to include someone with international experience
- Having the time to execute
- Finding the right resource
- Time to make sure project is executed properly, and first of all, strategically planned correctly
- Costs

Unprompted: Concerns About Trying To Coordinate Global PR Program (Continued)

5 Coordination

- Regional coordination
- Managing diverse countries and cultures
- Logistics
- Logistics
- Ability to coordinate with current international staff

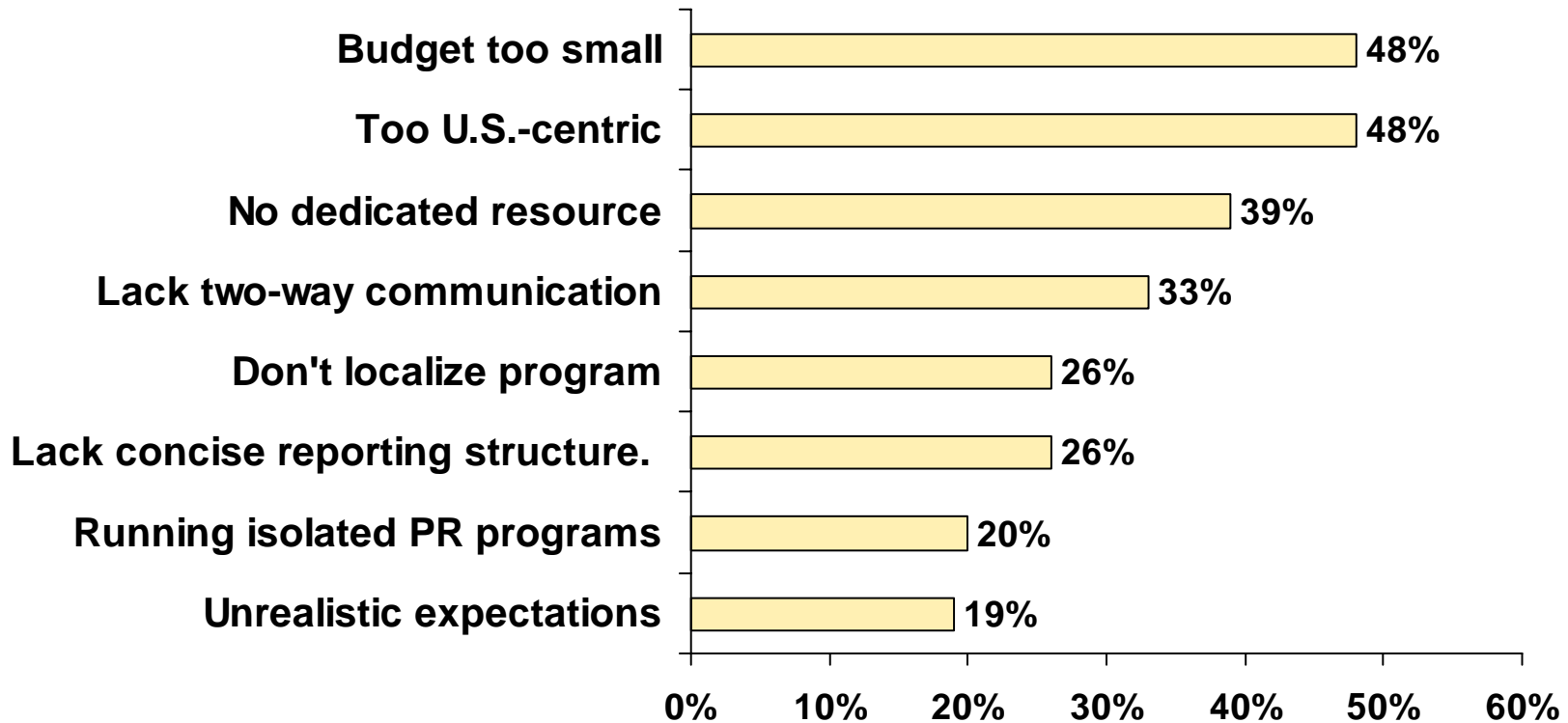
5 Other

- Lack of control/cost
- Internal organizational structure
- Industry specific branding
- Global competition
- Communication within company executives and mid-management

16 Does not apply or haven't thought about it

Anticipated Hurdles To A Successful Global PR Program Of Those Without A Program

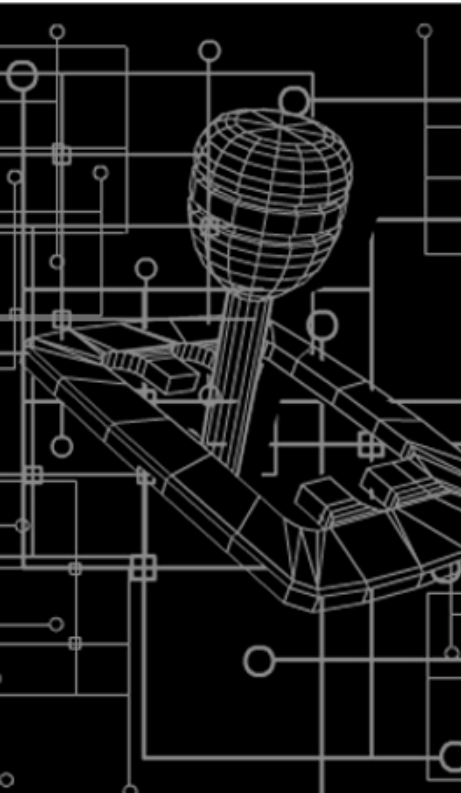
Besides lack of budget, respondents who do not have an international PR program anticipated their programs being too U.S.-centric.





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Interest In Coordination Network Model



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Descriptions Of Global Support Models

When it comes to global PR support, organizations can chose between the following three models:

The standard global agency model

The global agency model favors one global contract spanning across all geographies. As a result the client can only work with the local offices belonging to her or his agency of choice. Usually a global lead person is appointed to interface with the various local agencies. It is common that the lead person is based at the regional headquarters, which oversees the agency's country offices. Global agencies take pride in their unrivaled global reach and their wealth of communication resources around the world. The agency culture, however, is quite homogeneous as employees are bound by one vision to serve their clients.

The best-of-breed affiliate model

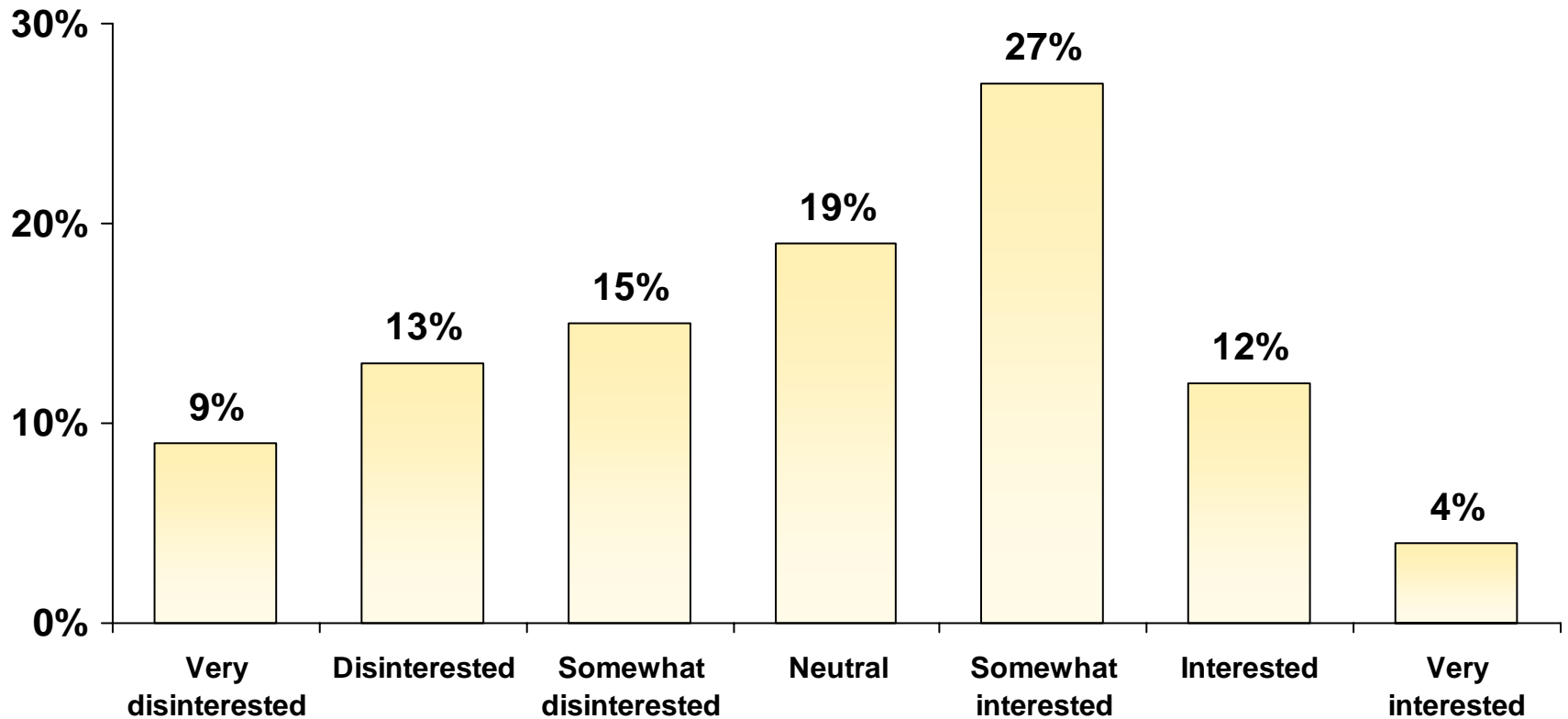
As a response to the global agency conglomerates, a few independent agencies have formed a network of affiliates to offer the same level of international PR expertise. The network of affiliate agencies usually comprises best-of-breed independent and organically-grown agencies in a number of different regions. This model focuses on local experts who know their culture and the PR landscape and media dos & don'ts of their country inside out. The client, however, has multiple points of contact depending on the number of affiliate agencies she or he chooses to work with and, to reap the benefits of this approach, the client must choose regional agency partners from within the affiliate network.

The global coordination model

Recently a third model has evolved which combines the advantages of a network of like-minded independent agencies and the global agencies' ability to offer a single point of contact and one-stop billing. Through the "global coordination" model, the U.S. lead agency provides a global liaison to ensure seamless communication between U.S. headquarters and its regional offices as well as the various agencies involved. As with the affiliate network, this approach encourages cross-agency creativity and out-of-the-box thinking. The client can also chose the agency partners and – at any point in the relationship – tap a different regional partner if needed , even outside the affiliate network, without sacrificing the benefits of a single point-of-contact and billing.

Interest In Coordination Network Model

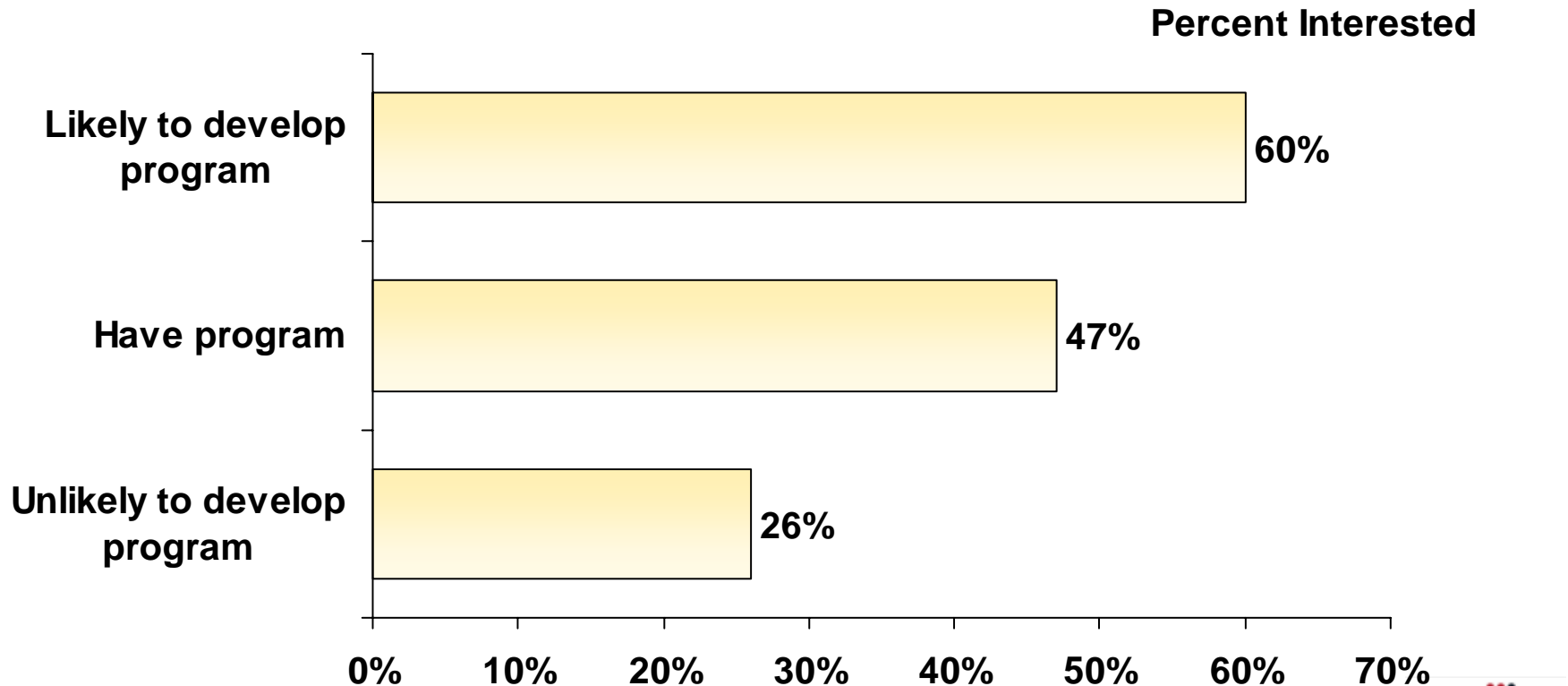
Overall, interest in the Coordination Network Model was moderate with the largest percentage saying they were somewhat interested and only 16% saying interested or very interested.



Percent Interested In Coordination Network By Whether They Already Have A Program or Developing One

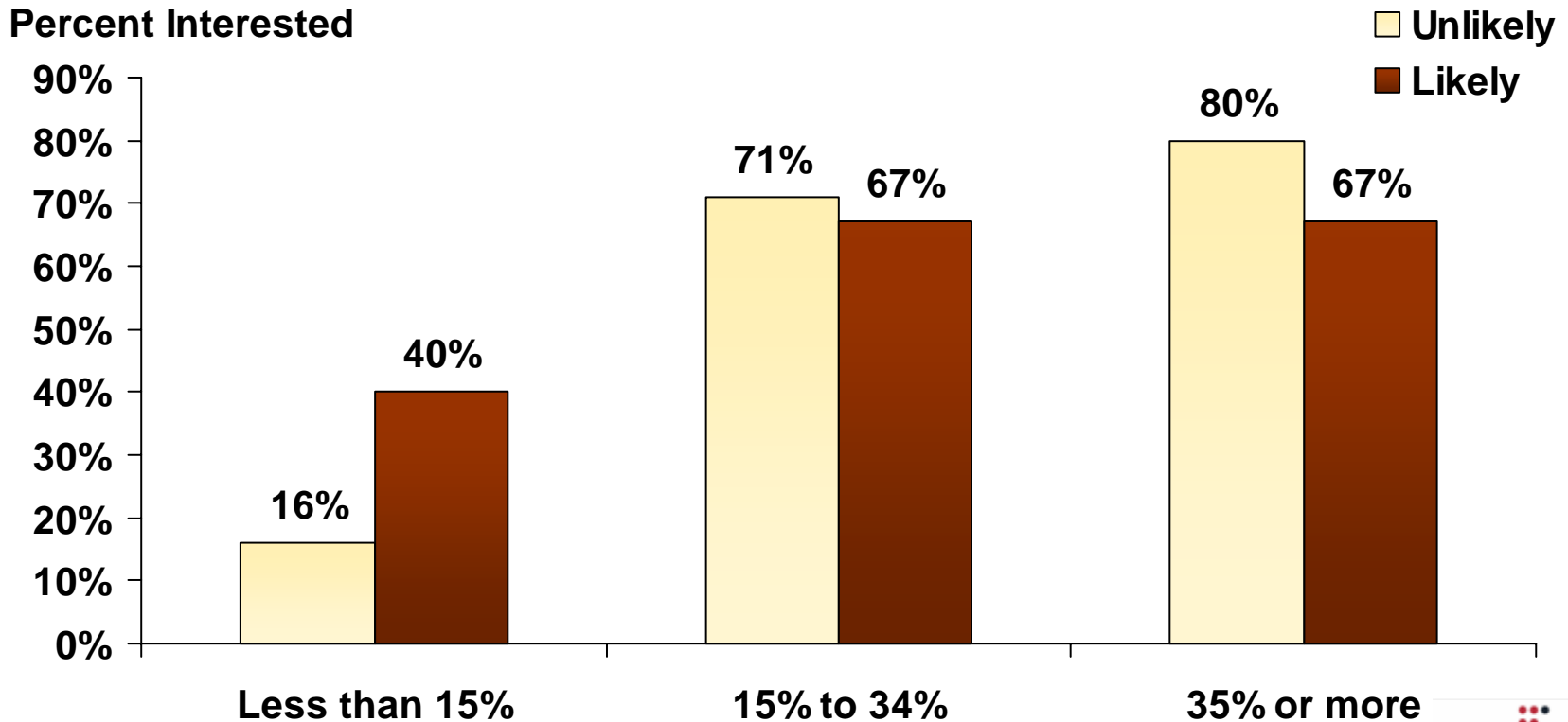
Companies without a current program but likely to develop one in the next 12 months are the most interested in the coordination network model. (They represent 18% of the population, however.)

Those without a current program but unlikely to develop one are the least interested.



Interest By Percent Of Revenue From Out Of US And Likelihood To Develop International Program

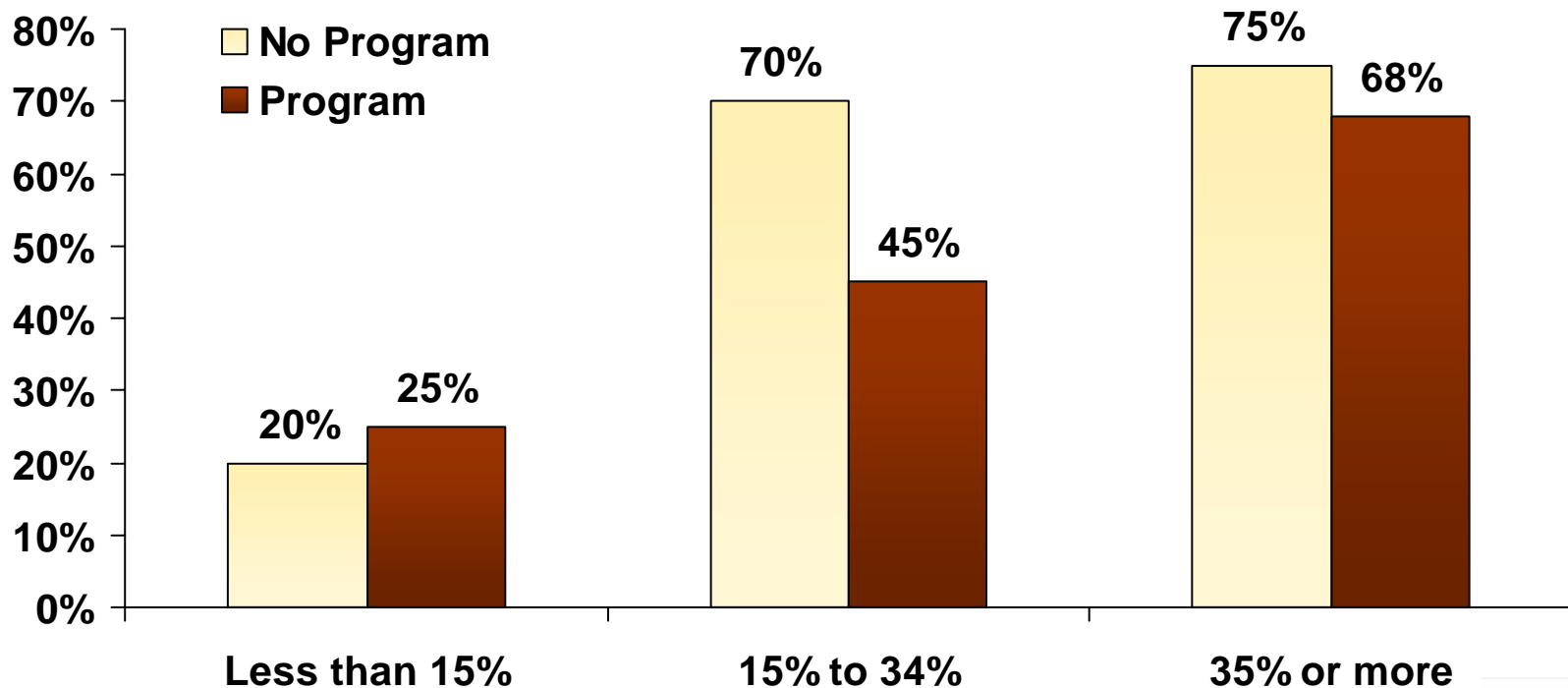
The moderate relationship between likelihood to develop an international program and interest in the Coordination Network Model is swamped by the effect of the percent of revenue coming from non-U.S. sources; in fact it is slightly negative once percent of revenue exceeds 15%.



Percent Interested In Coordination Network By Percent Revenue From Non-U.S. Sources And Whether They Already Have A Program

Companies with a higher percentage of revenue coming from non-U.S. sources are more interested in the Coordination Network Model; this is especially so for those who do not already have an international PR program.

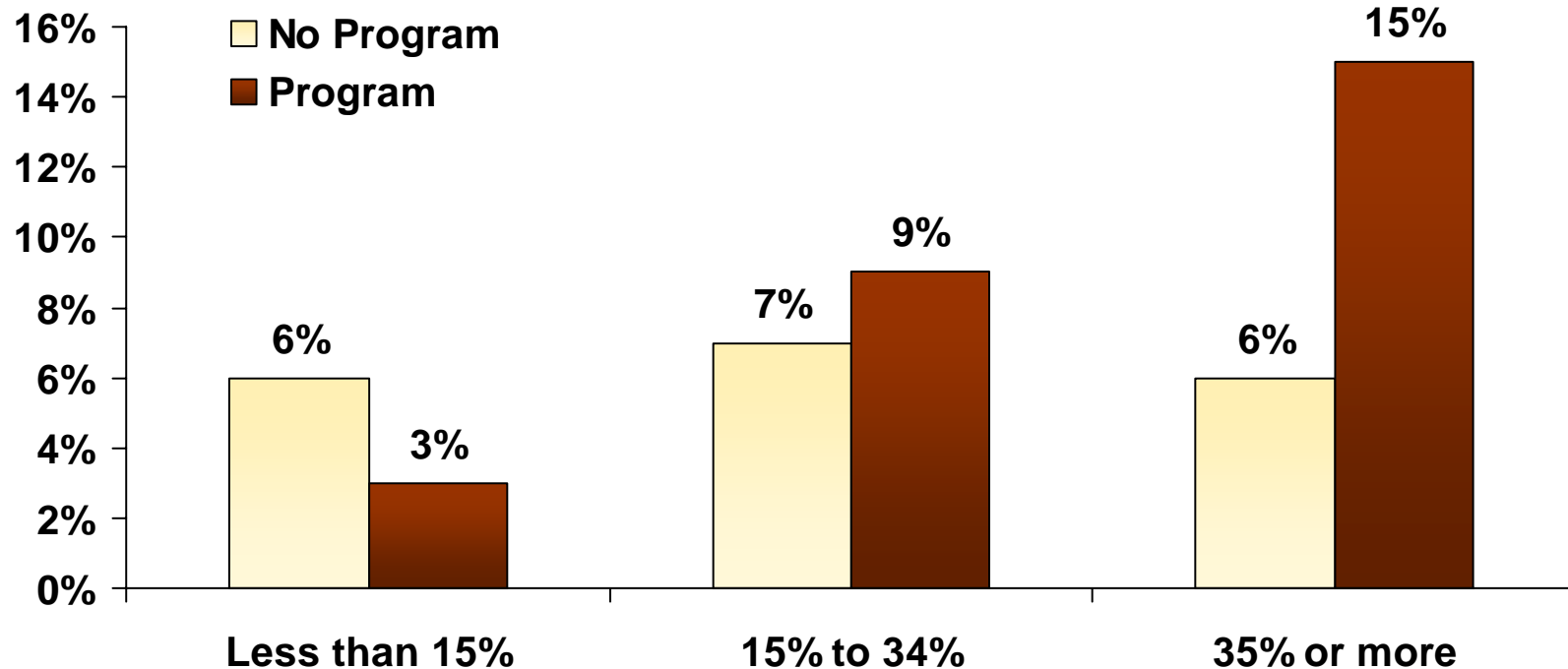
Percent Interested



Top Target Segment

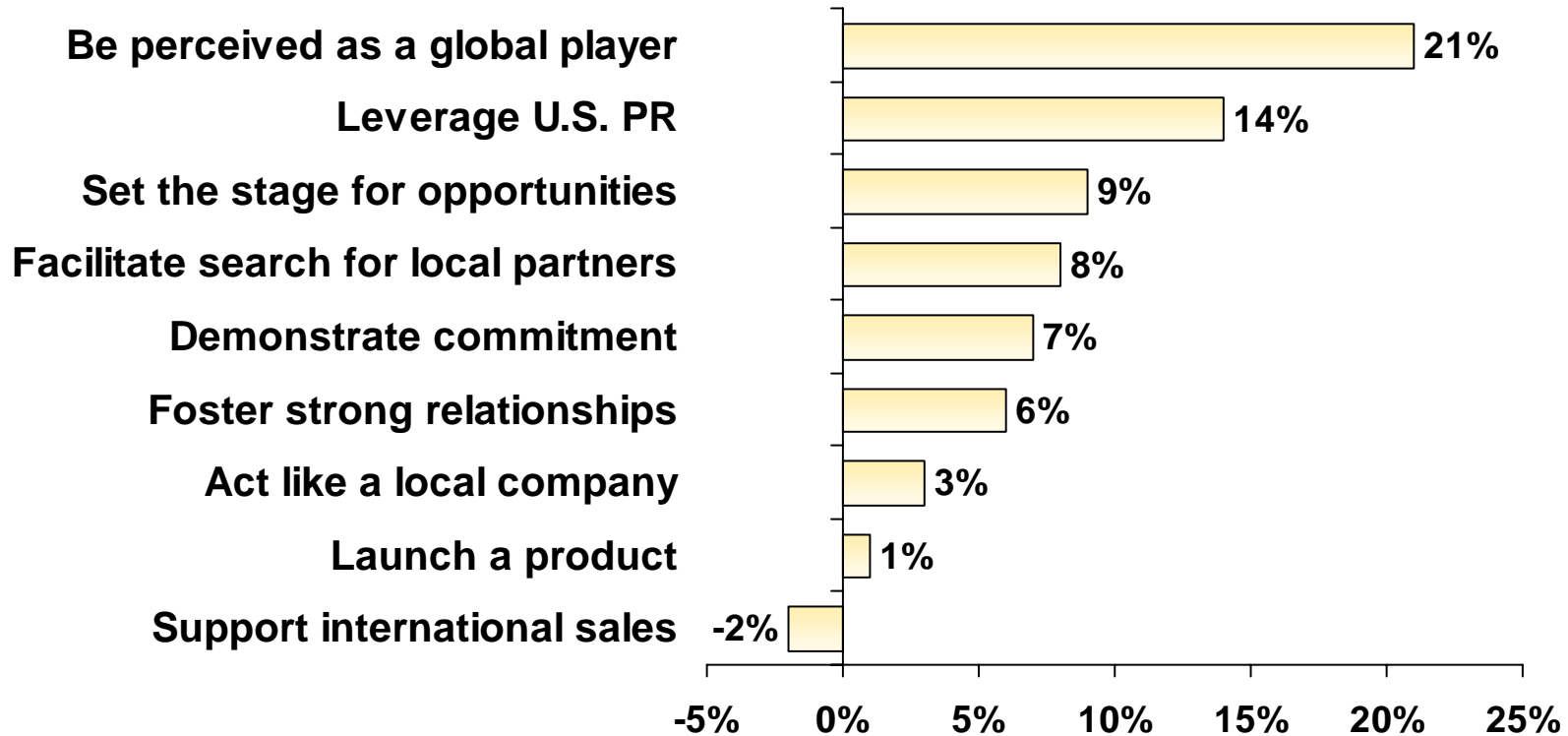
The largest group interested in the Coordination Network Model are companies with an international PR program who get more than 35% of their revenue from outside the U.S.

Percent Interested In Population



Percent Difference In Goals Of International PR Between Those Interested vs. Not Interested

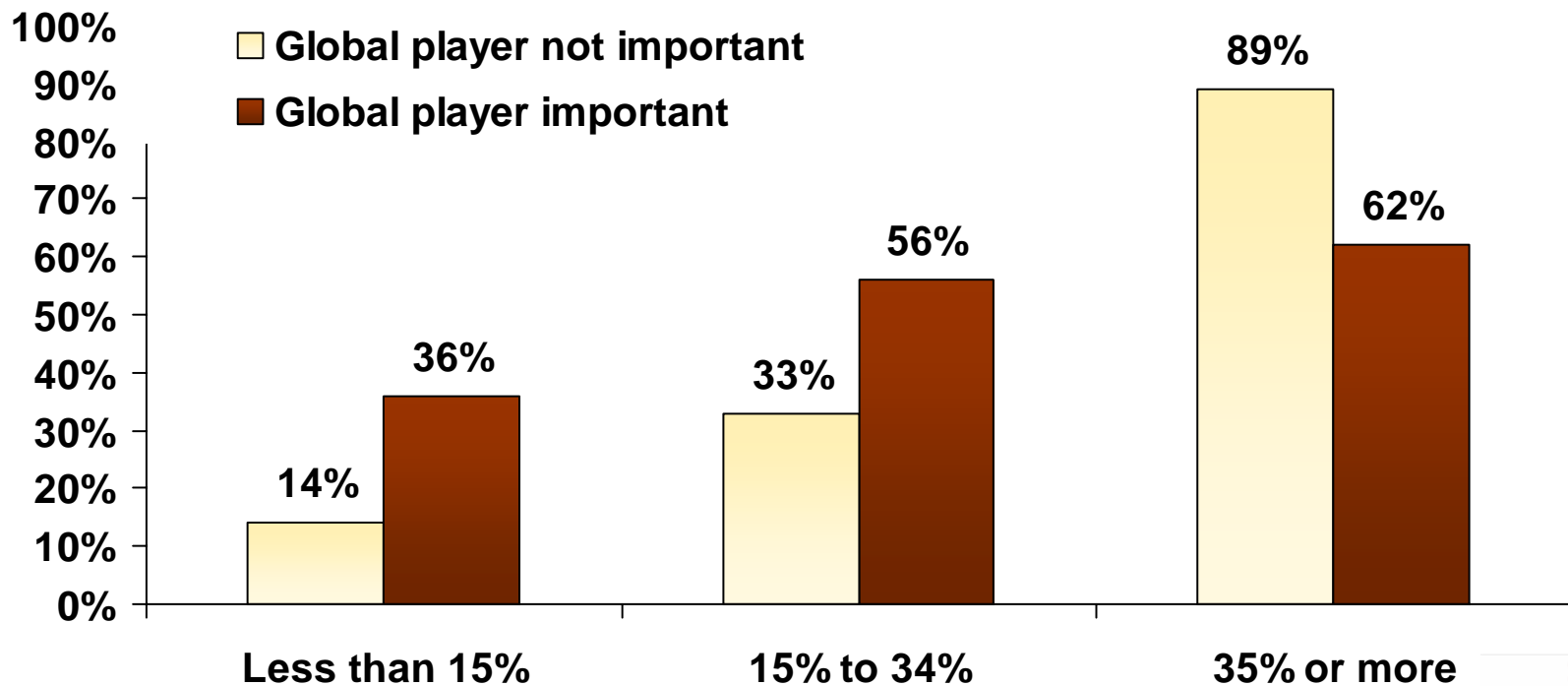
The only statistically significant difference is that those interested in the Coordination Network Model are more likely to have being perceived as a global player as one of their goals.



Percent Interested In Coordination Network By Wanting To Be Global Player & Percent Revenue From Non-U.S. Sources

Those for whom being perceived as a global player is an important goal of an international PR program are more likely to be interested in the Coordination Network Model except if the percent of revenue from non-U.S. source exceeds 35%; presumably they already are perceived as global players.

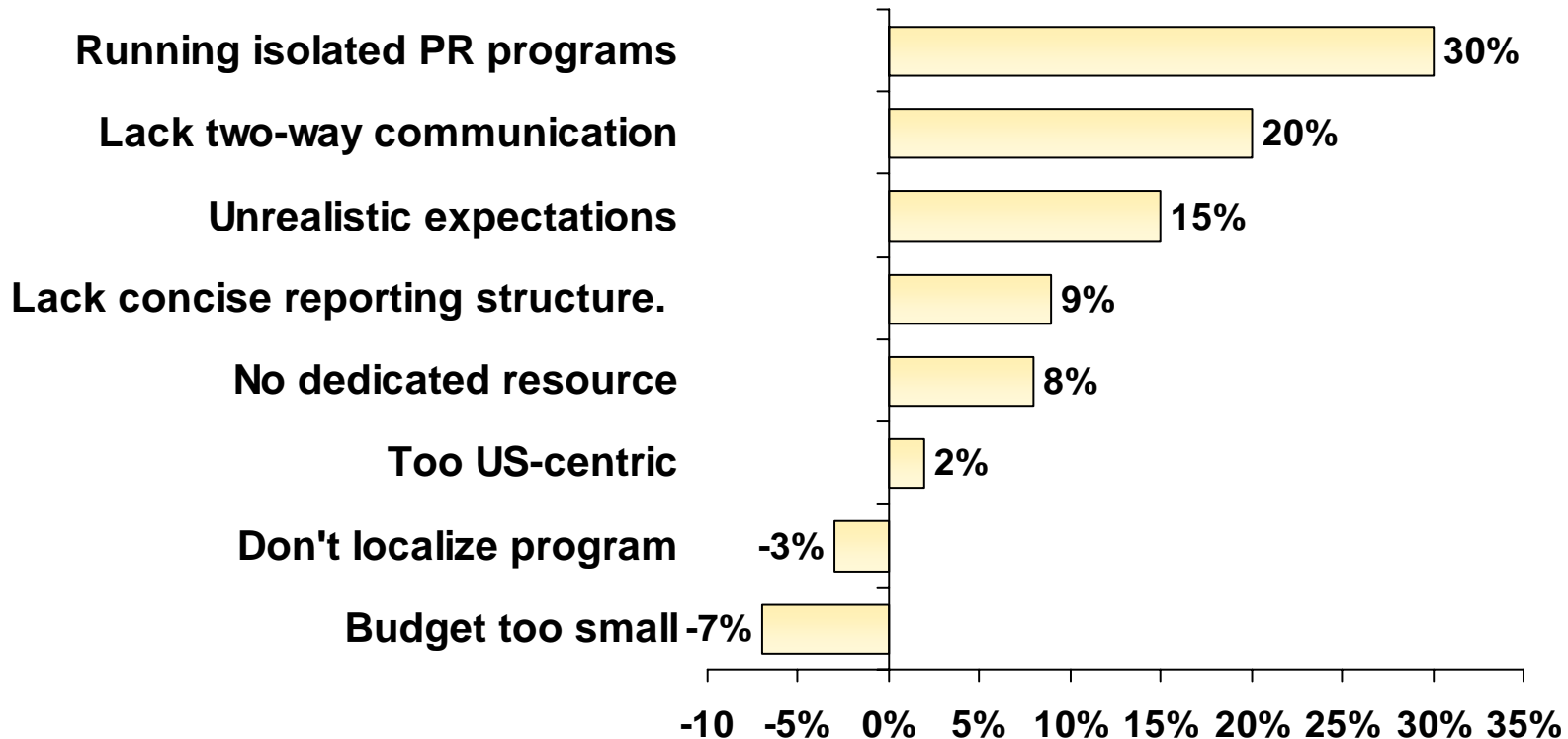
Percent Interested



Percent Difference In Hurdles To International PR Between Those Interested vs. Not Interested

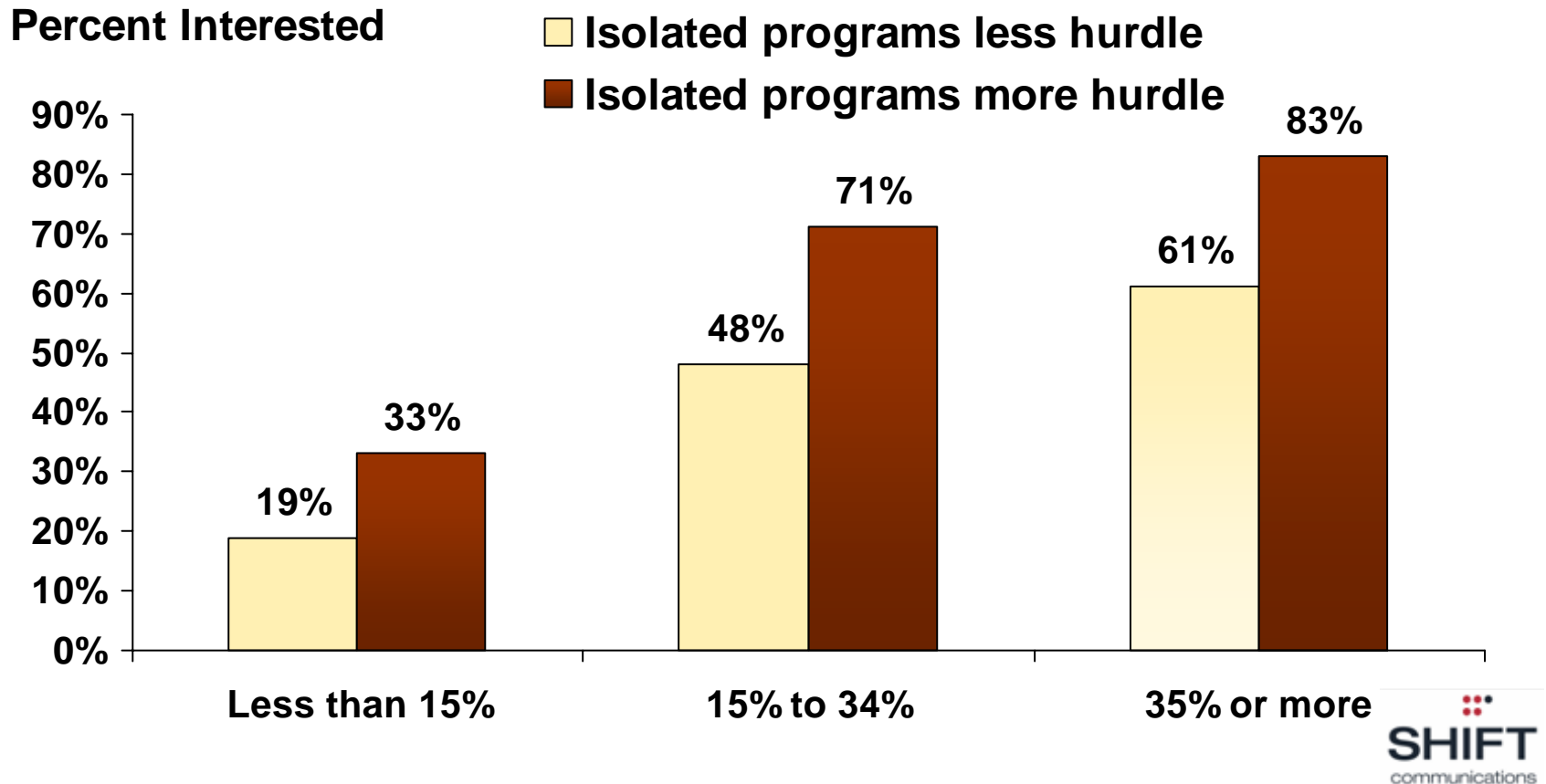
Significantly more of those interested in the Coordination Network Model saw two hurdles as obstacles to a successful global PR program:

- We're running isolated PR programs - there's no cross-fertilization between the agencies.
- The lack of two-way communication between regional offices and headquarters results in inconsistent messaging and branding.



Percent Interested In Coordination Network Model By Seeing Isolated Programs Is Hurdle & Percent Revenue From Non-U.S. Sources

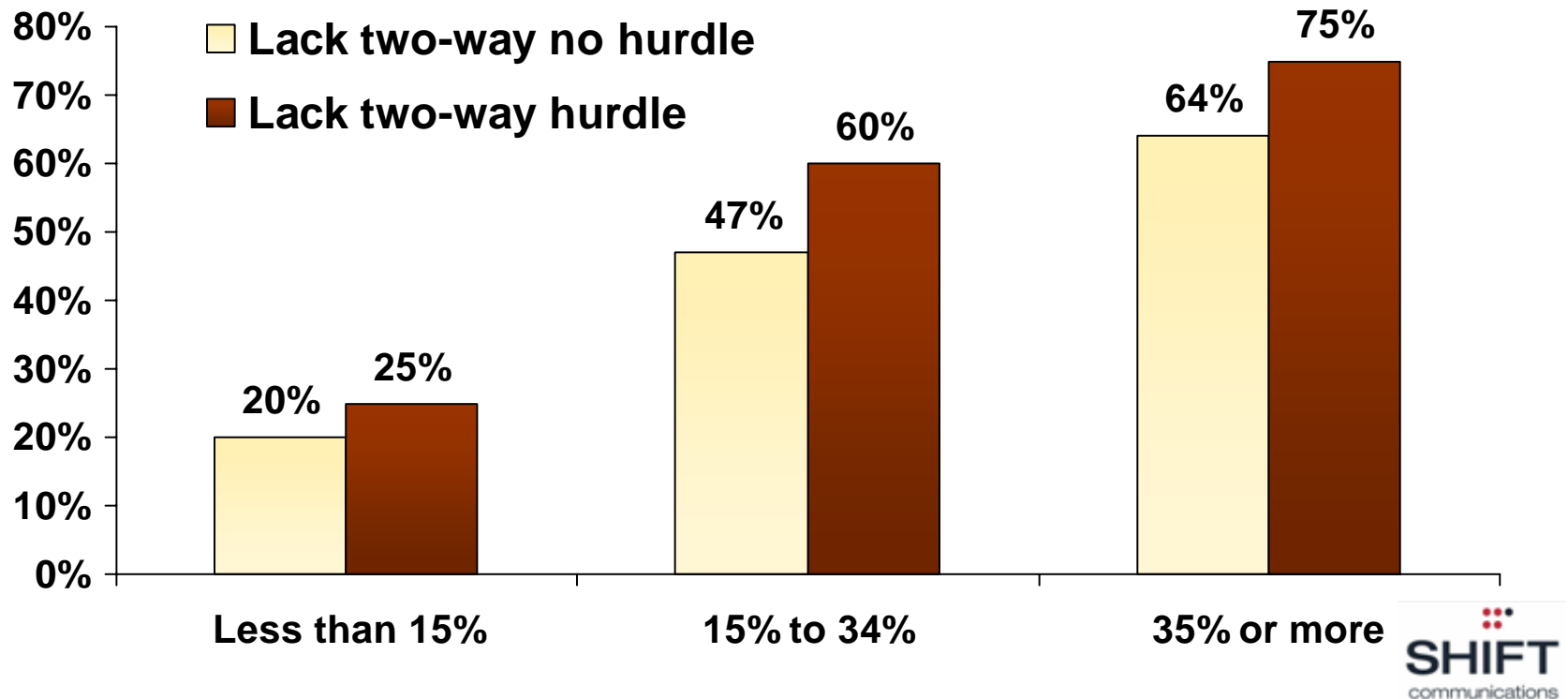
Those for whom isolated programs is a hurdle to the success of an international PR program are more likely to be interested in the Coordination Network Model.



Percent Interested In Coordination Network Model By Lack of Two-Way Communication Is Hurdle & Percent Revenue From Non-U.S. Sources

Those for whom the lack of two-way communication is a hurdle to the success of an international PR program are more likely to be interested in the Coordination Network Model.

Percent Interested



Other Factors Related to Interest in the Coordination Network Model

58% of those who believe that appointing a global liaison to manage communication is a strategy to insure adherence to a single strategy are interested compared to 30% who do not believe in the strategy.

91% of those who have a manager dedicated to EMEA AND AsiaPac are interested and just over 40% of those who have a manager dedicated to either EMEA OR AsiaPac are interested compared to 30% who have neither.

Two-thirds of those with non-U.S. agencies supporting their global PR efforts are interested compared to a quarter of those without non-U.S. agencies.

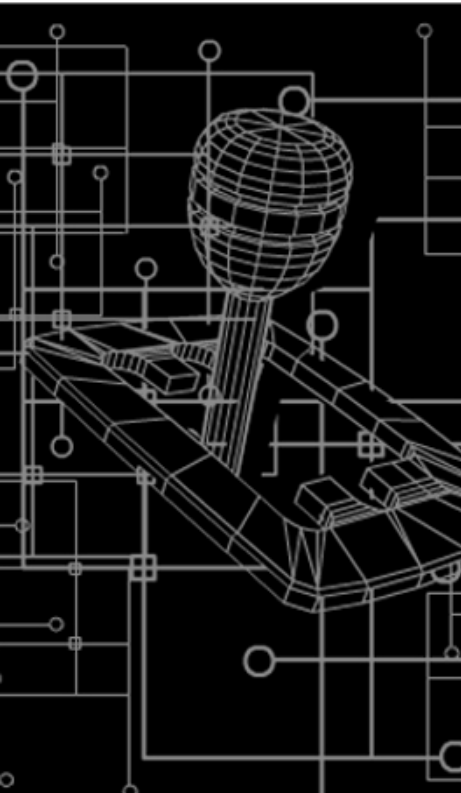
Two-thirds of those who worked with a global PR agency in the past but are not doing so currently are interested compared to 45% of those who are working with a global PR agency currently and 39% of those who have never worked with a global agency.

Two-thirds of those who work with 3 or more external PR agencies are interested compared to 35% if those who work with two or less external agencies.



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Importance Of Model Benefits



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Benefits Of Different Global PR Models

Global agency model

I work with only one agency across multiple geographies to facilitate coordination and communication	Facilitate coordination
Global PR firms make me feel confident and are easier to sell to management	Feel confident
As my organization grows I know a global agency can support me anywhere	Global agency supports anywhere
A truly global organization needs a prestigious global agency to work with	Need prestigious global agency

Best-of-breed affiliate model

Local agencies employ natives who know the culture inside out	Natives know culture
Communicating with various agencies directly gives me more control over the process	More control over process
A network of affiliates share a common approach to PR	Share common approach
Agencies with different cultures can feed off each other's creativity	Feed off each other's creativity

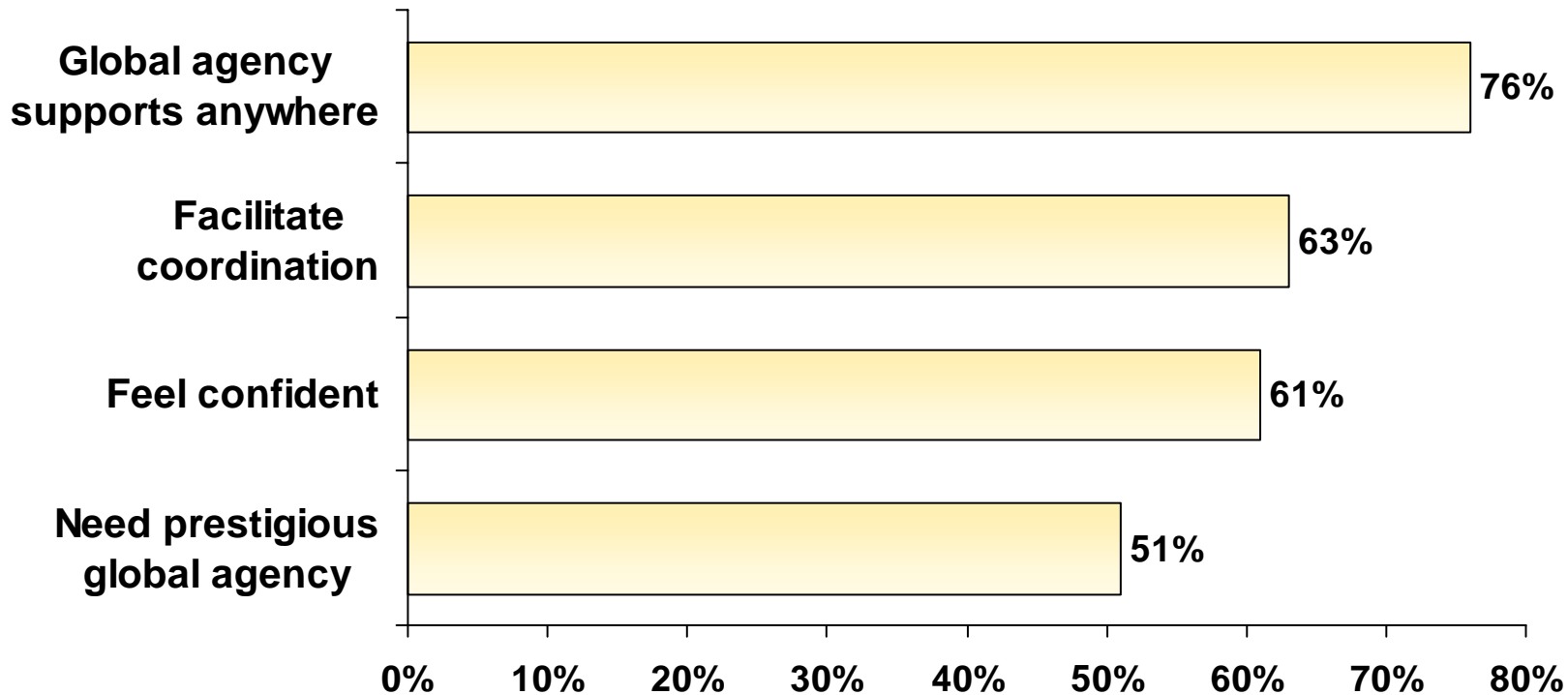
Global coordination network model

A global coordinator ensures seamless communication across geographies and offices	Seamless communication
Local agencies employ natives who know the culture inside out	Natives know culture
The model allows me to pick and choose on a local level but still offers one-stop billing	Pick best with one-stop billing
Agencies with different cultures can feed off each other's creativity	Feed off each other's creativity

Importance of Benefits of Global Agency Model Among Those Interested In Coordination Network

For those interested in the **Coordination Network Model**, the most important benefit of the **Global Agency Model** is that the agency can support them anywhere.

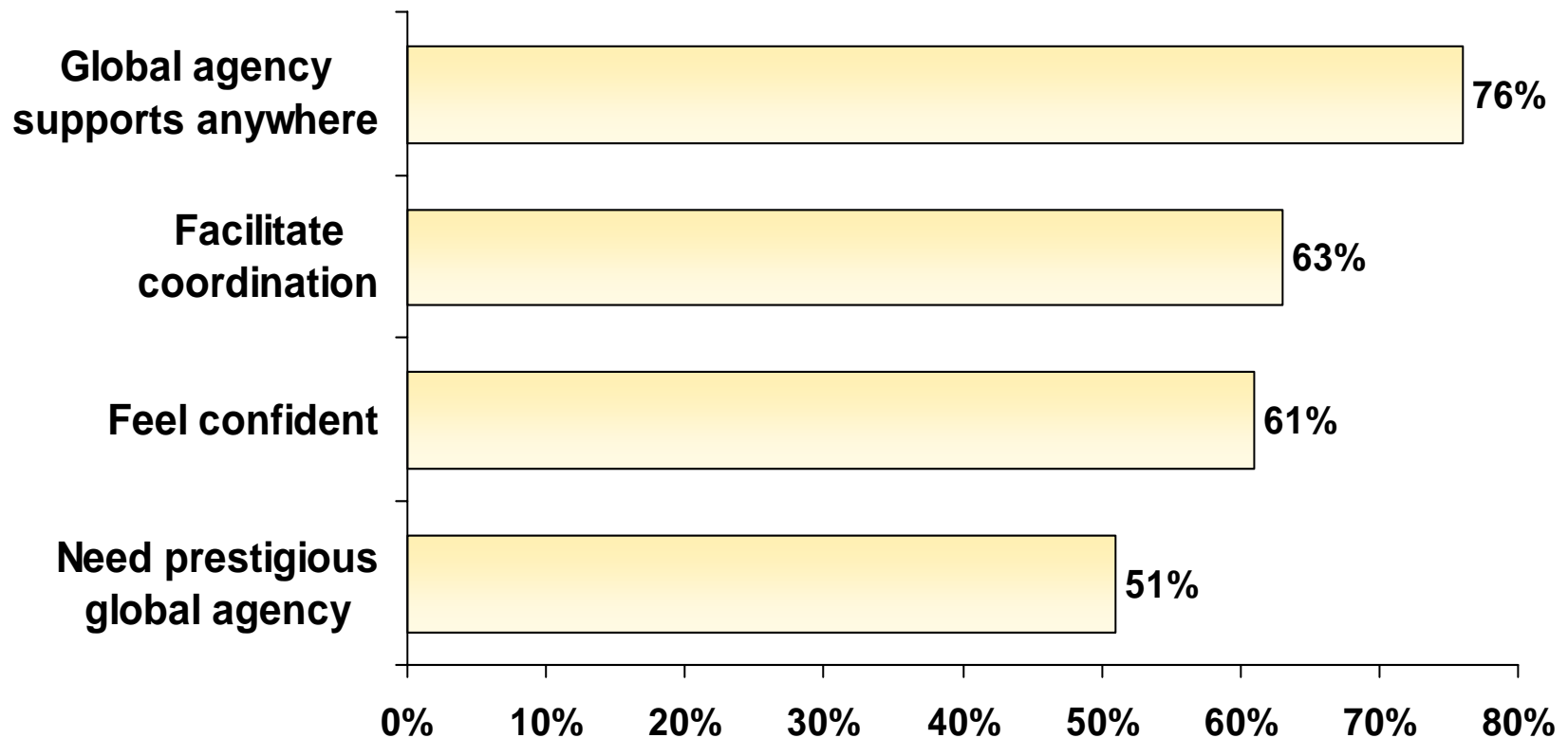
Percent Interested



Importance of Benefits of Global Agency Model Among Those Interested In Coordination Network

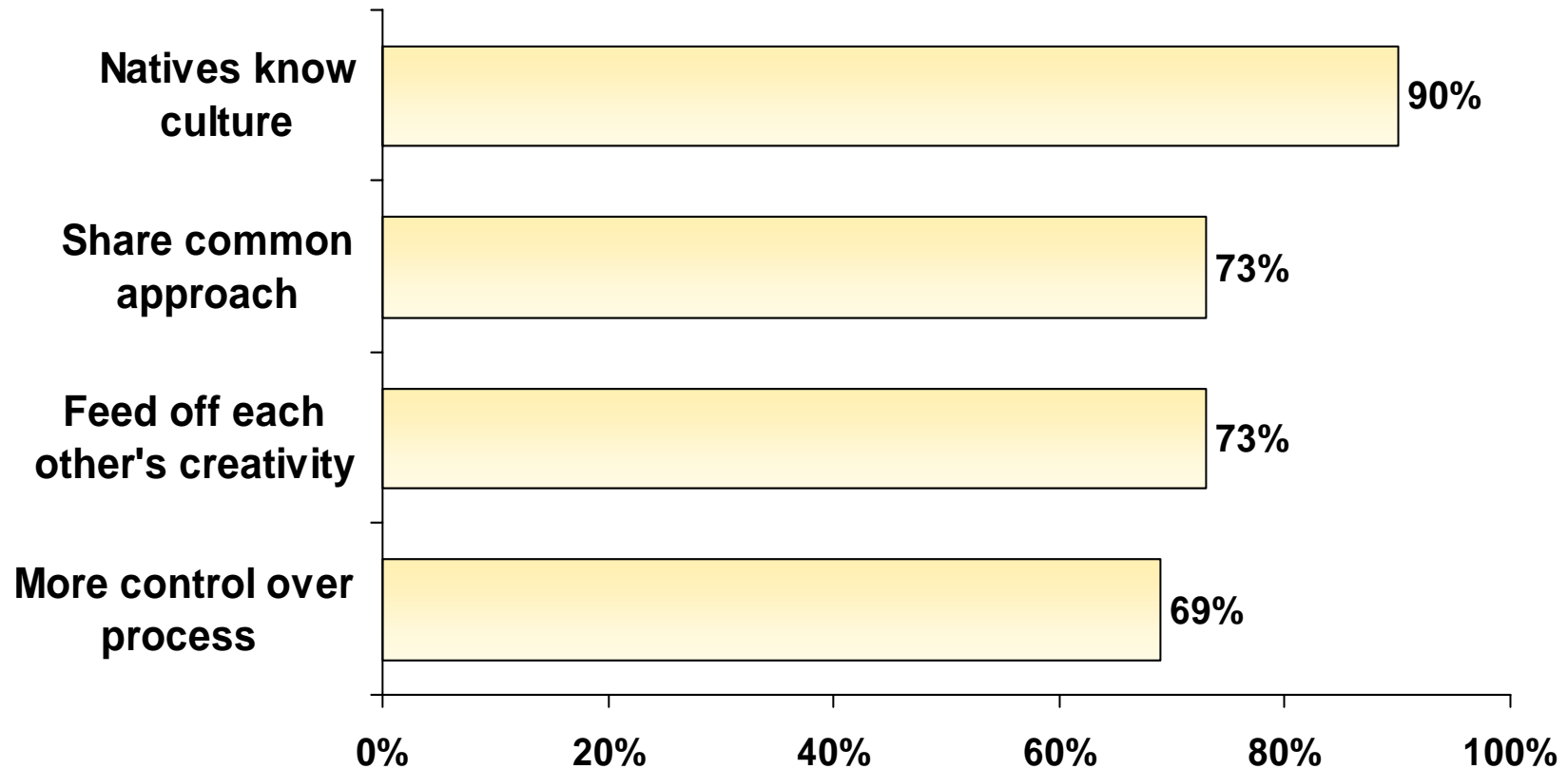
For those interested in the Coordination Network Model, the most important benefit of the Global Agency Model is that the agency can support them anywhere.

Percent Interested



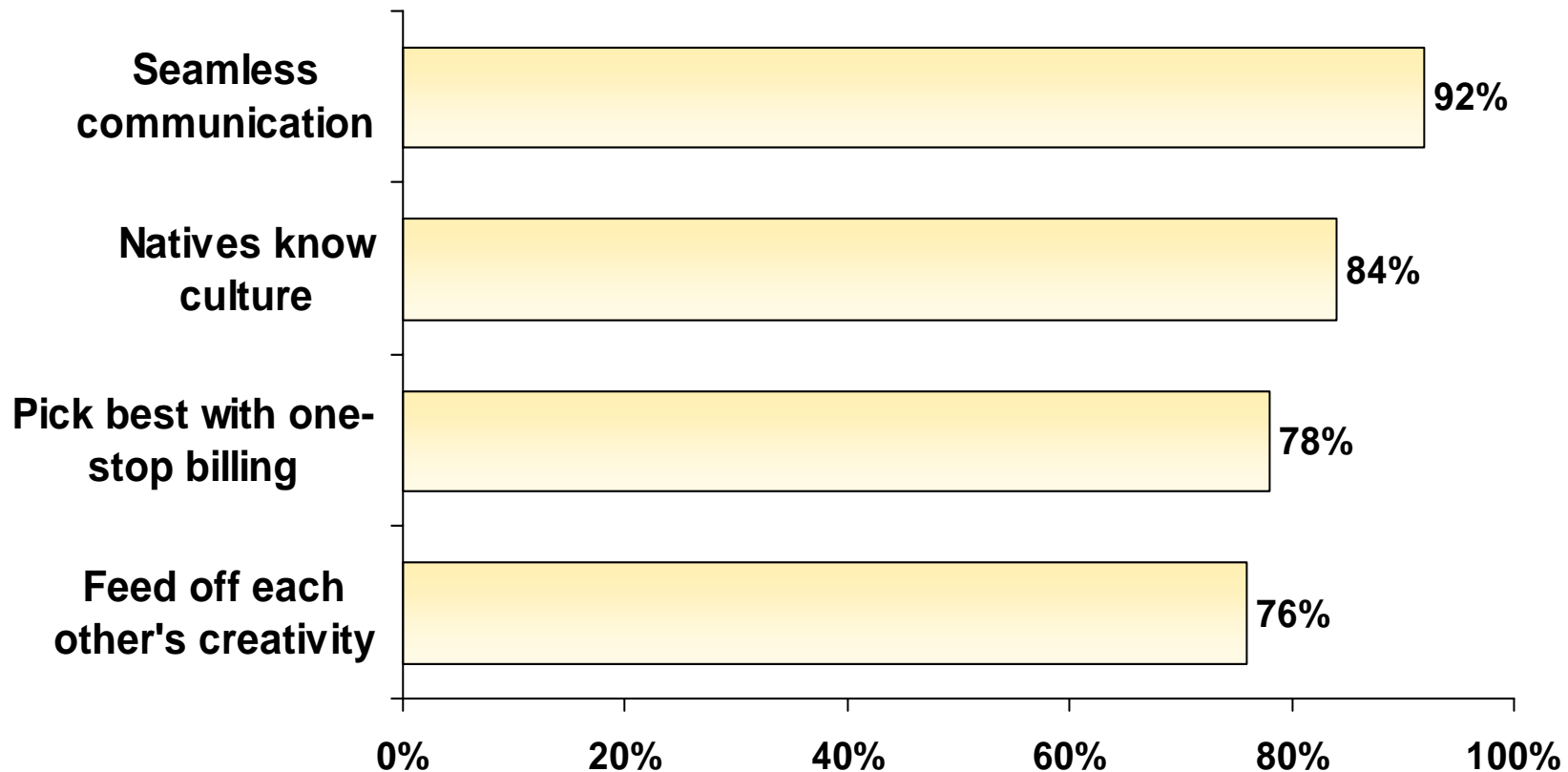
Importance of Benefits of Best-of-breed Model Among Those Interested In Coordination Network

For those interested in the Coordination Network Model, the most important benefit of the Best-of-Breed Model is that natives know the local culture.



Importance of Benefits of Coordination Network Among Those Interested In Coordination Network

For those interested in the Coordination Network Model, the most important benefit is seamless communication.





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APPENDIX



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Other Findings

Three-quarters of companies with international PR programs is the main goal of the program.

- Roughly half of companies without such programs anticipate that being perceived as a global player would be the main goal of such a program.

Half of by those with an international PR program saw two major hurdles to a successful global PR program:

- Lack of two-way communication between regional offices and headquarters that results in inconsistent messaging and branding
- Their budget for international PR is too small to make an impact

Those without an international PR program estimated that the percent of their PR budgets that would be spent on international PR to be much lower than the experience of those with such programs:

- With an international PR program: median = 17%.
- Without an international PR program: median = 7%
- Without an international PR program but likely to develop one: median= 10%

The greater the percentage of revenue derived from non-U.S. sources, the more likely a company is to develop an international PR program:

- 17% of those with less than 15% of revenue from non-U.S. sources are likely to develop a program
- 30% of those with 15% to 34% of revenue from non-U.S. sources are likely to develop a program
- 38% of those with 35% or more of revenue from non-U.S. sources are likely to develop a program

Other Findings (Continued)

Roughly half of those without a currently thought being perceived as a global player and to launch a product or service would be the primary goals of such a program.

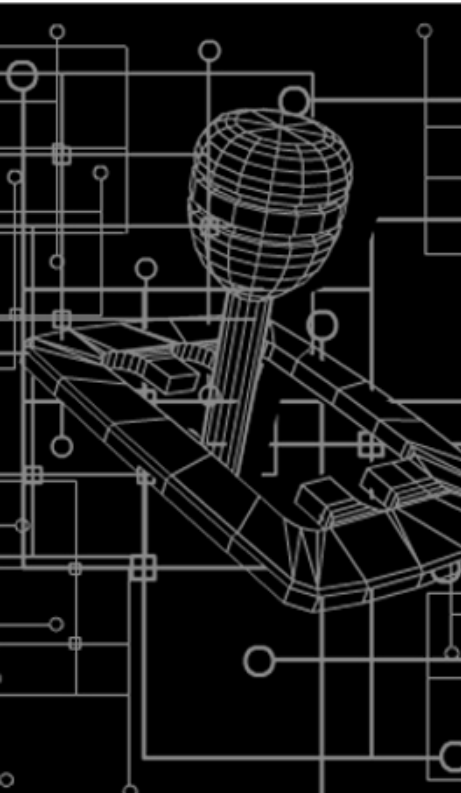
Roughly half of those without a currently anticipated lack of budget and the program being too U.S.-centric would be the primary obstacles to success.

Companies without a current program but likely to develop one in the next 12 months are the most interested in the coordination network model. (They represent only 6% of the population, however.)



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Sample Profile



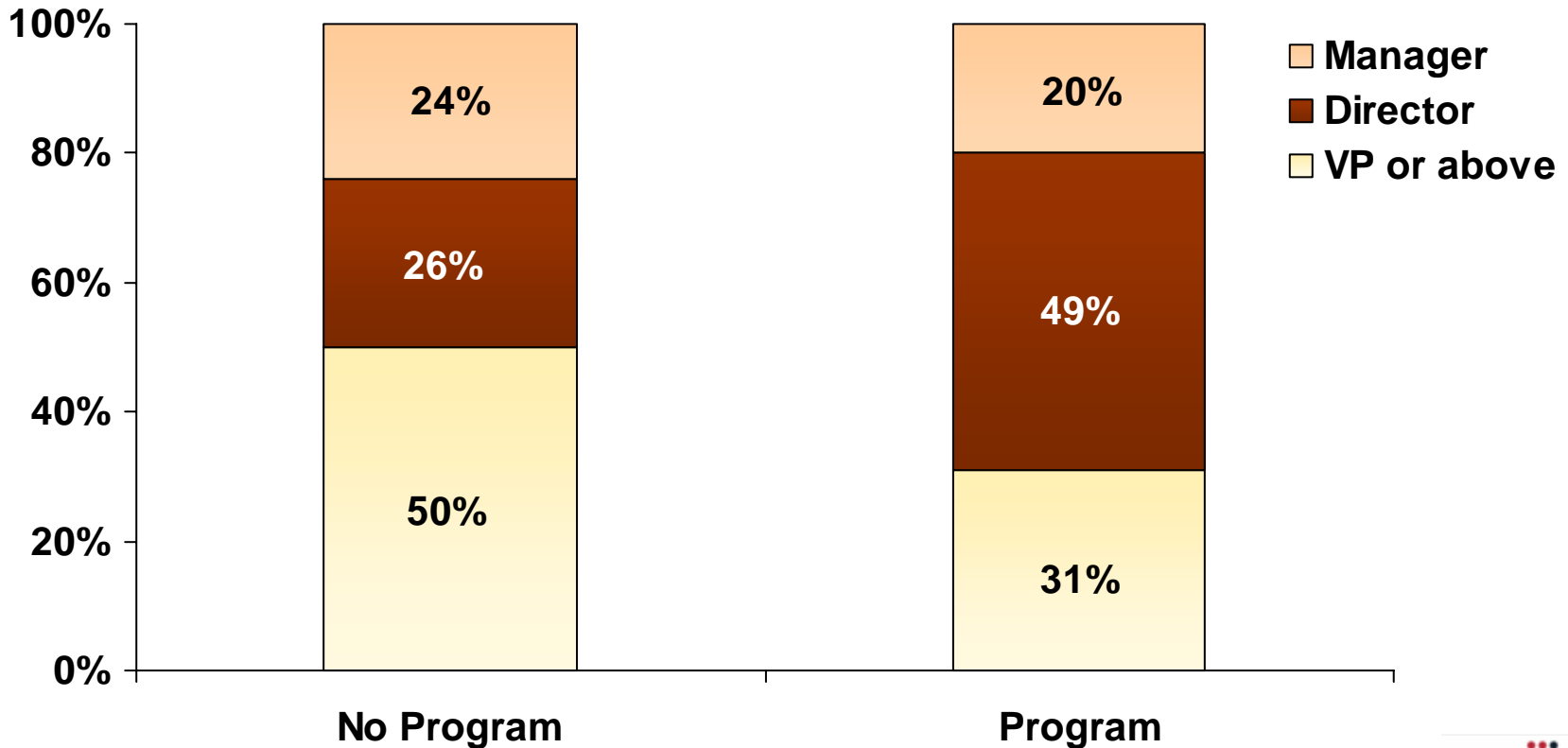
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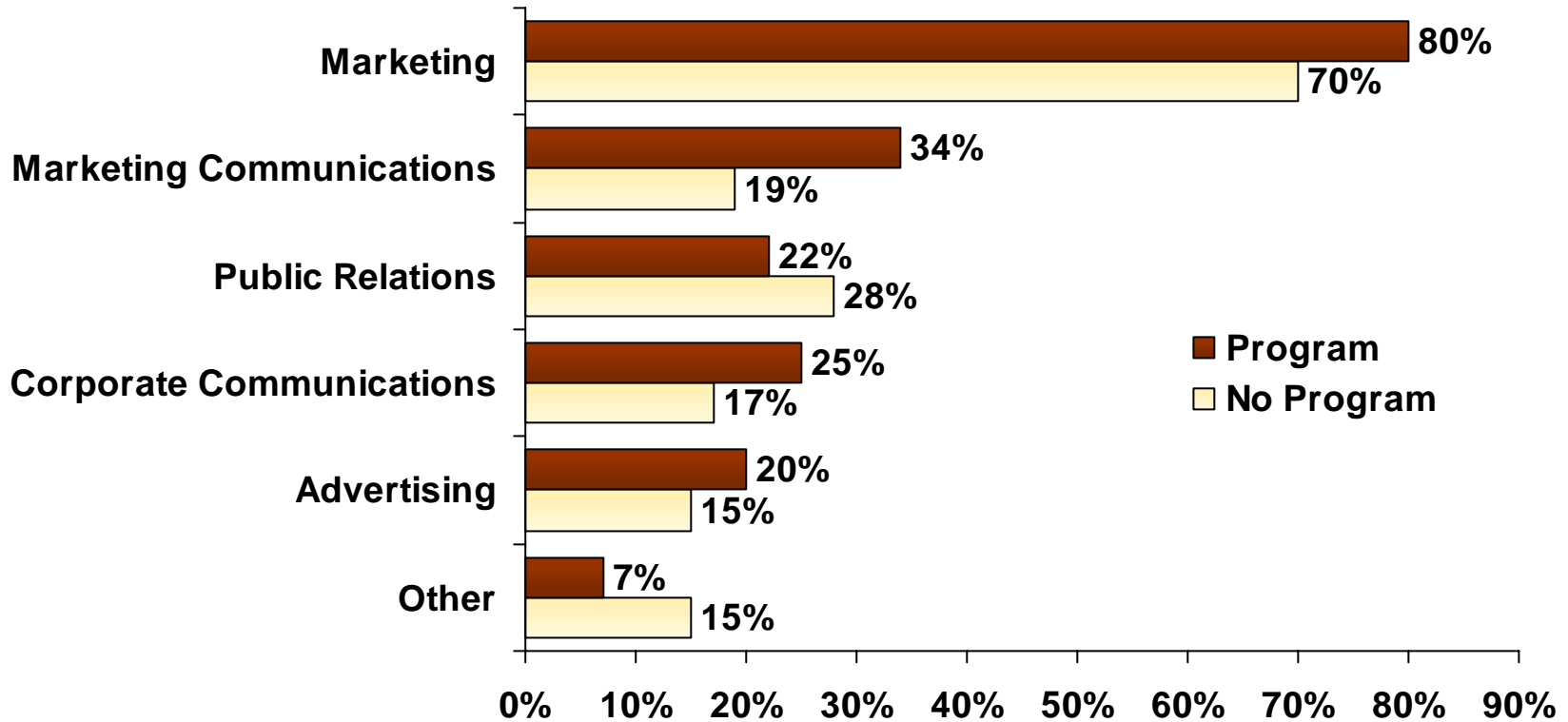
Level In Organization

While the proportion of managers within the sample was pre-set, respondents with international PR programs were more likely to be Director level.



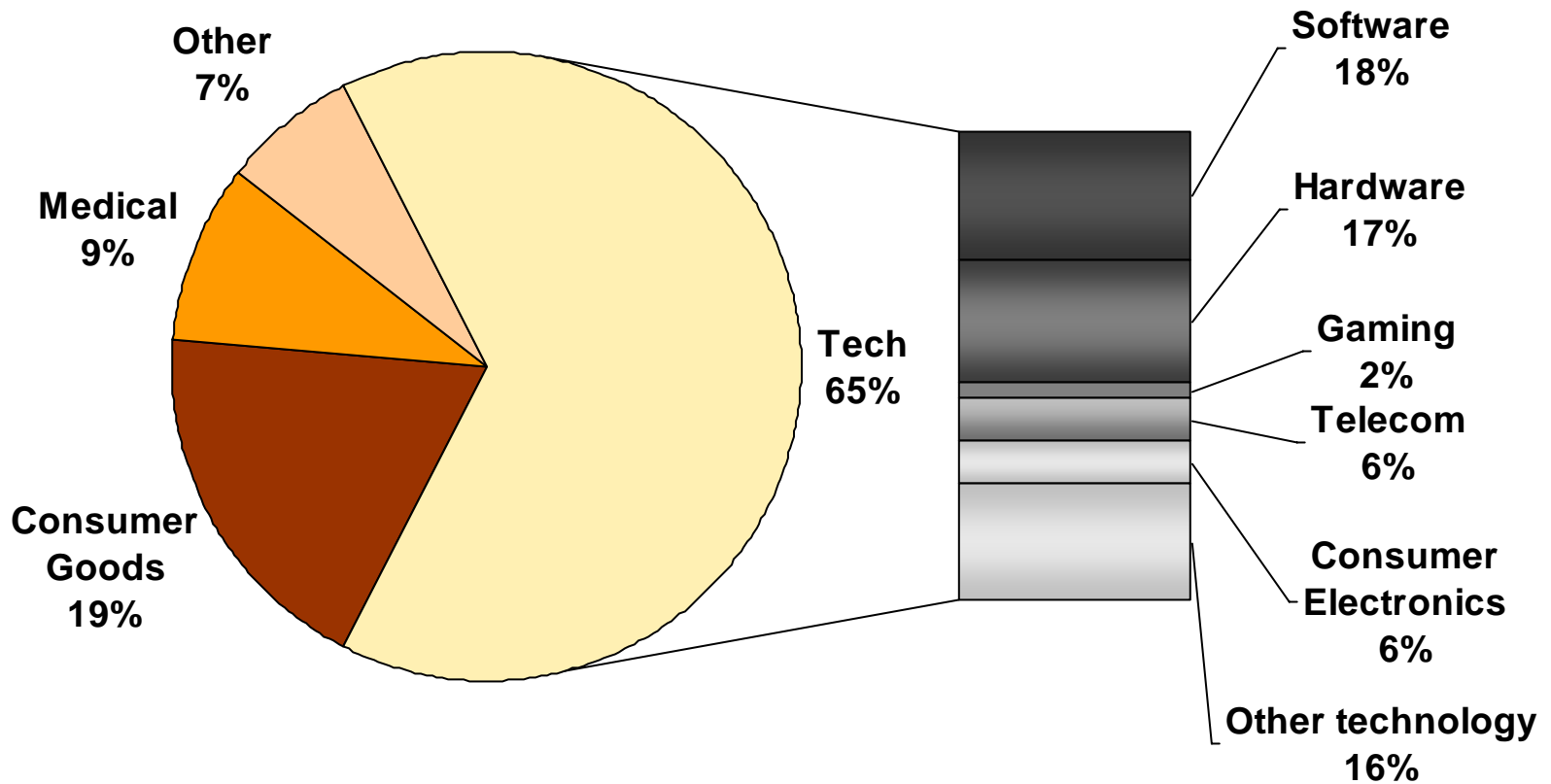
Department

Respondents were overwhelmingly from Marketing Departments. Of those in Marketing, a third indicated one of the multiple other functional areas as well (average = 2.6 other areas besides Marketing).



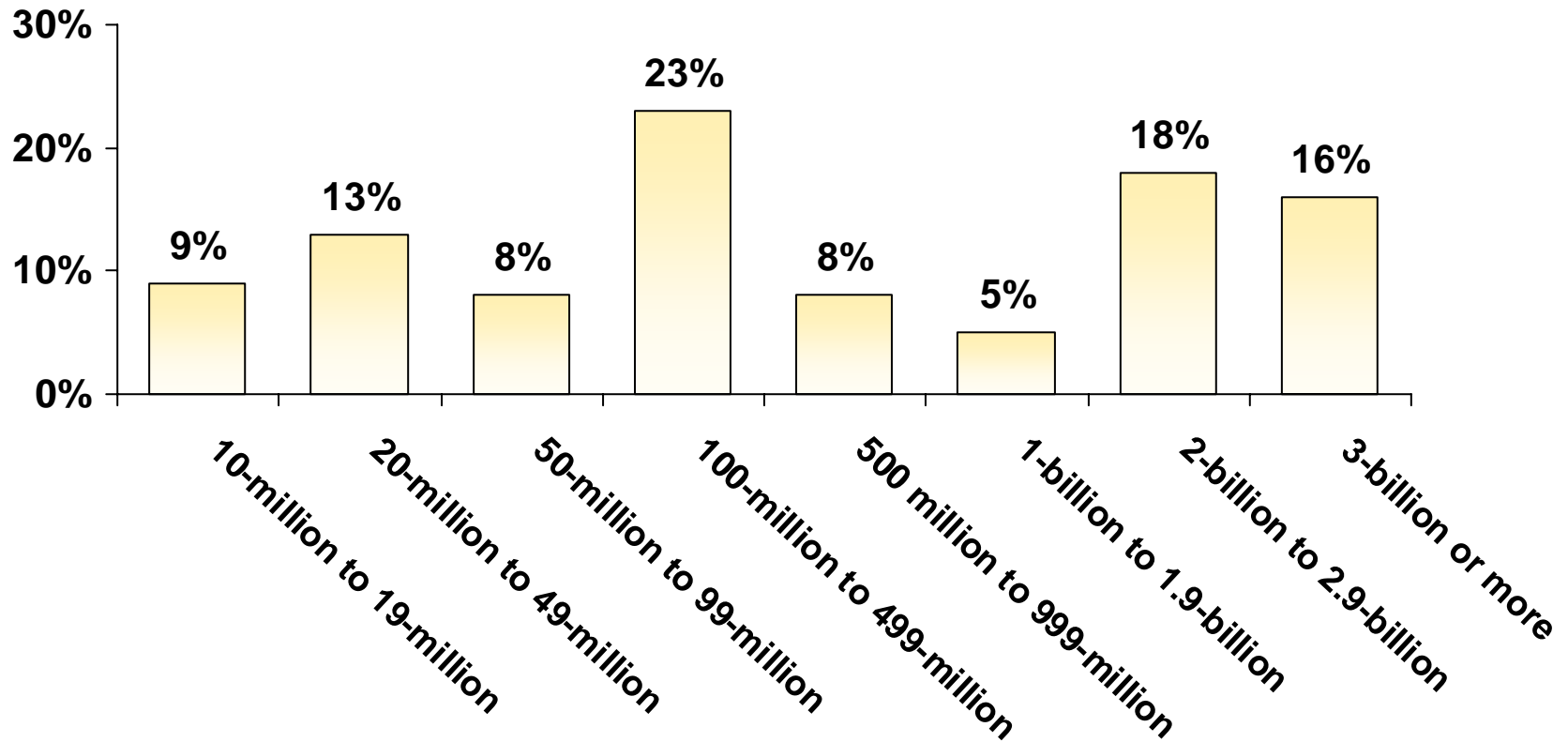
Industry

Two-thirds came from consumer oriented tech industries; another 19% from other consumer goods.



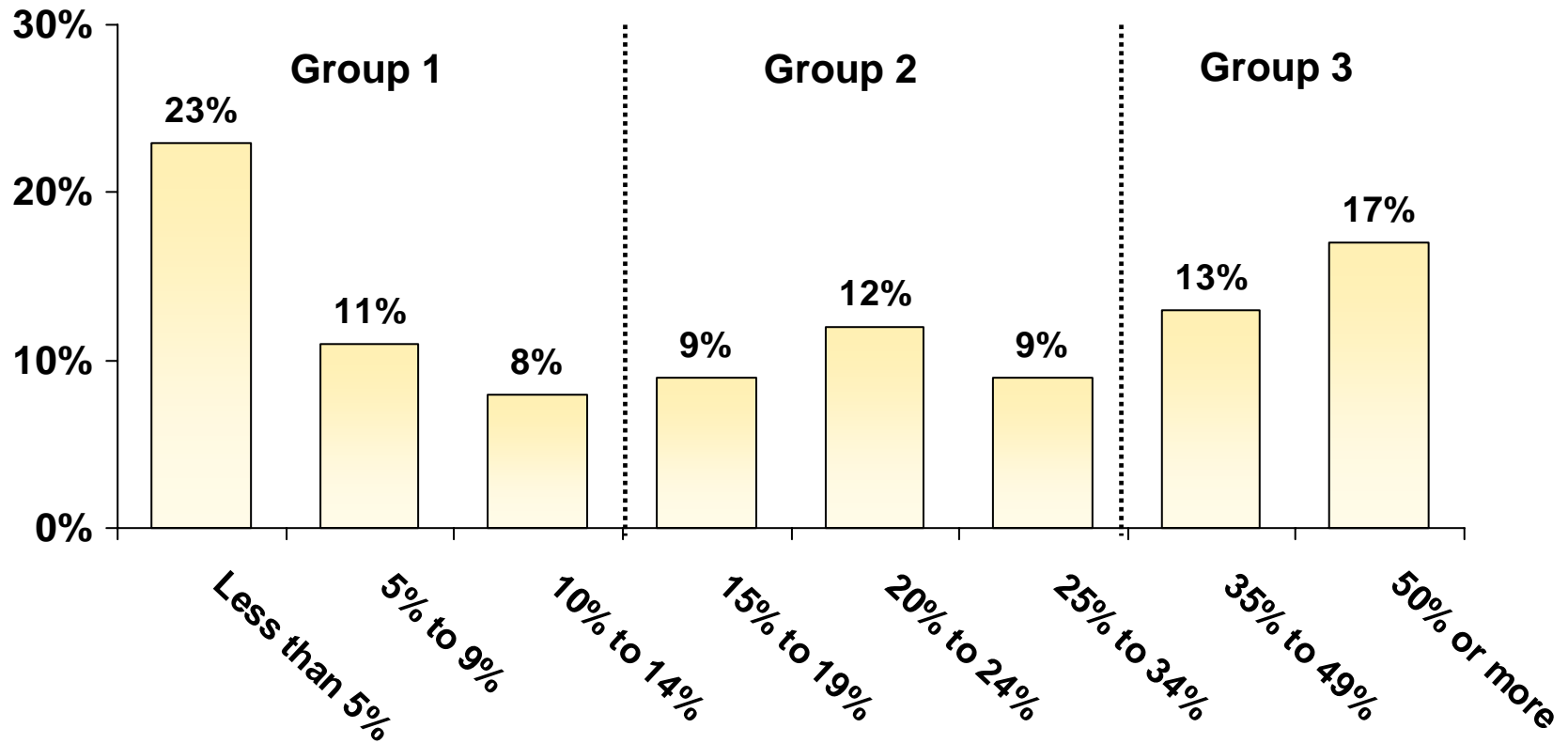
Revenue

The sample skewed toward larger companies with 39% having revenues greater than \$1-billion.



Percent Of Revenue Derived From Non-U.S.

The groupings were developed to keep them relatively equal and once you break at 35% it seemed to make sense to break at 15%.





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Overall PR

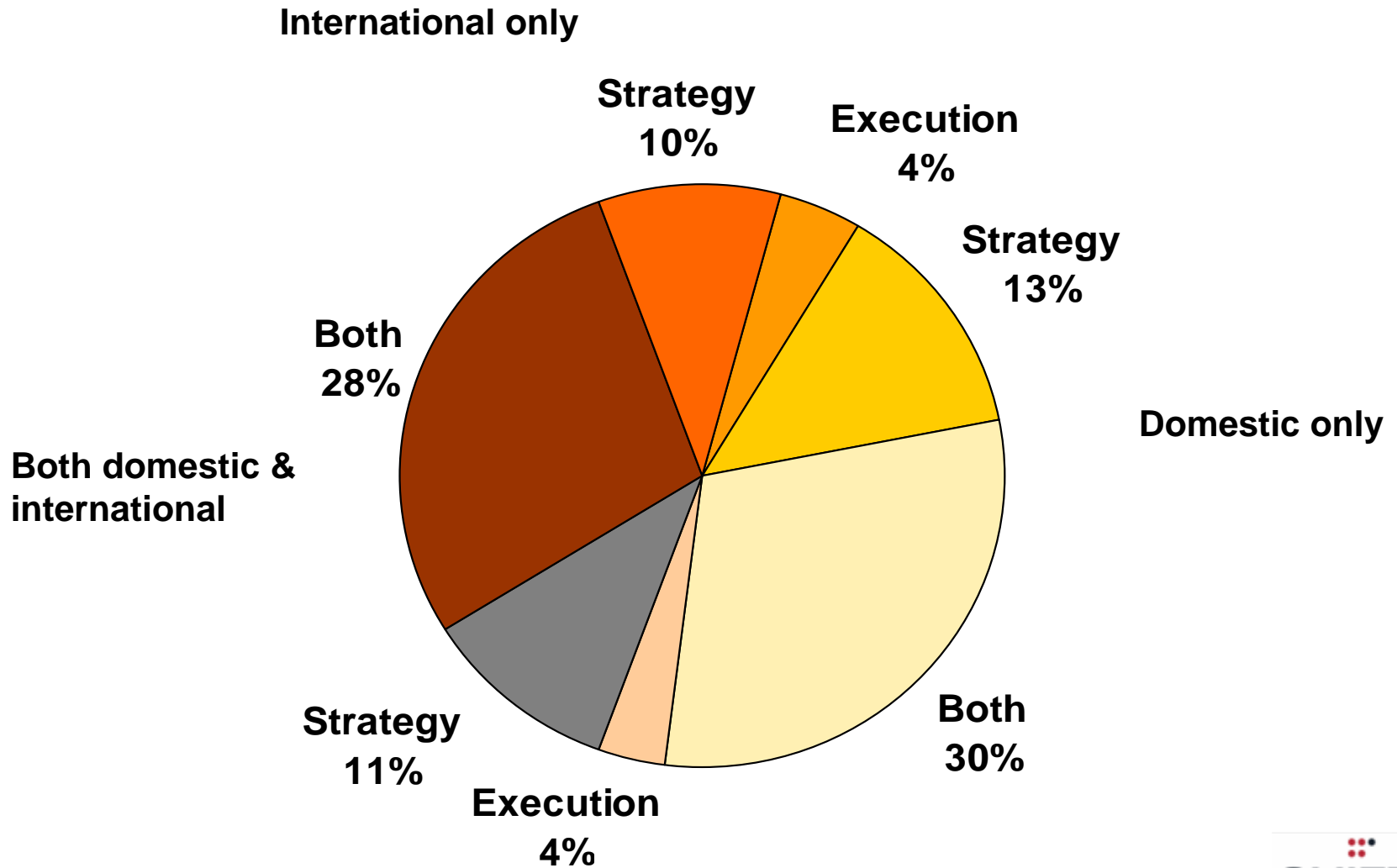


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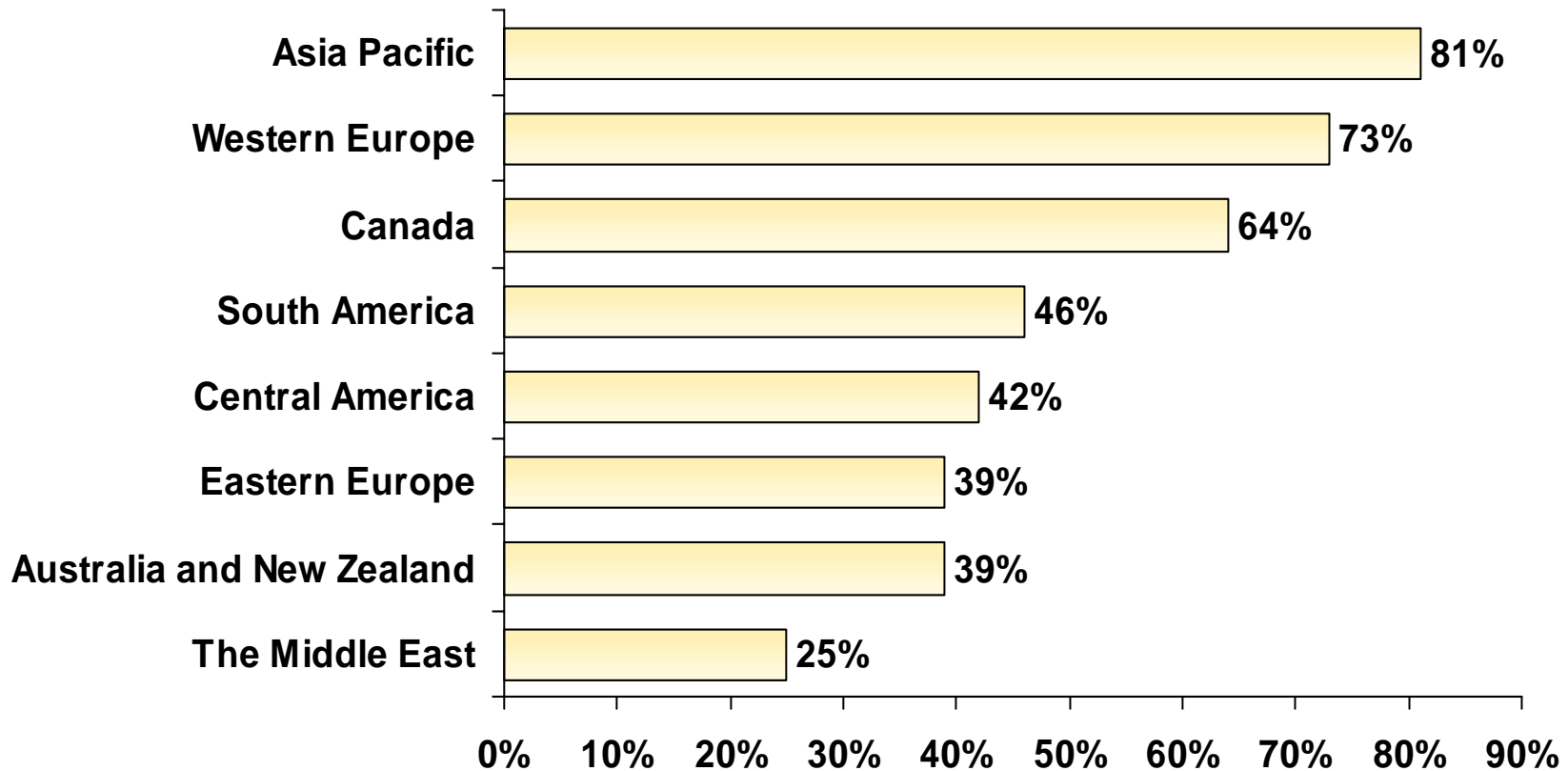
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Responsibilities Within International and/or Domestic PR Programs



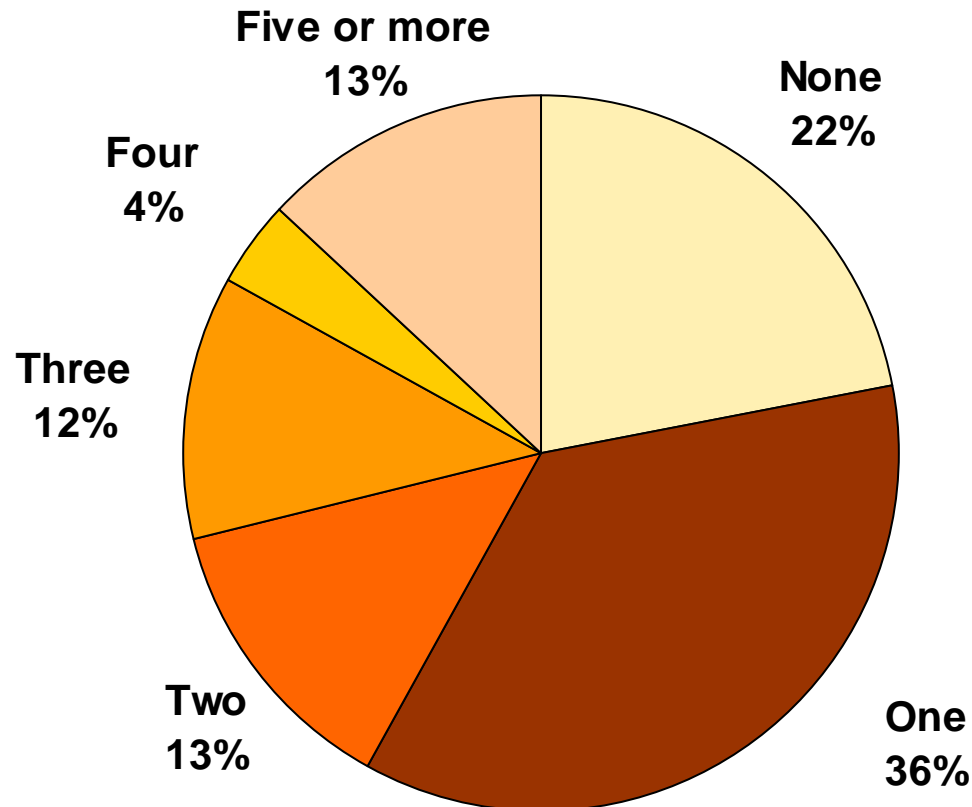
International PR Program Regions

Asia Pacific, Western Europe and Canada lead in terms of regions where companies have PR programs in place.



Number Of External PR Agencies

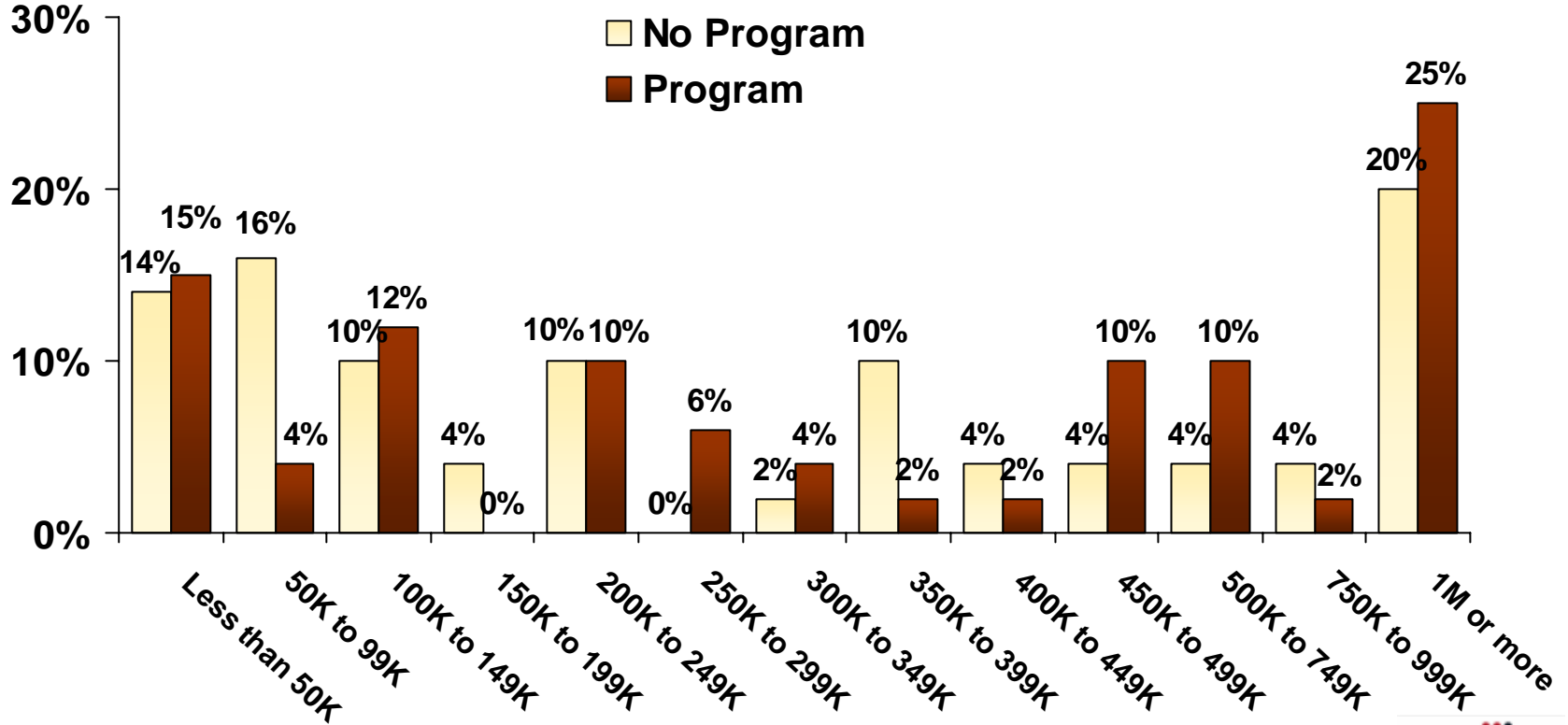
About half use more than two external PR agencies.



PR Budgets

Annual PR budgets were higher than we anticipated.

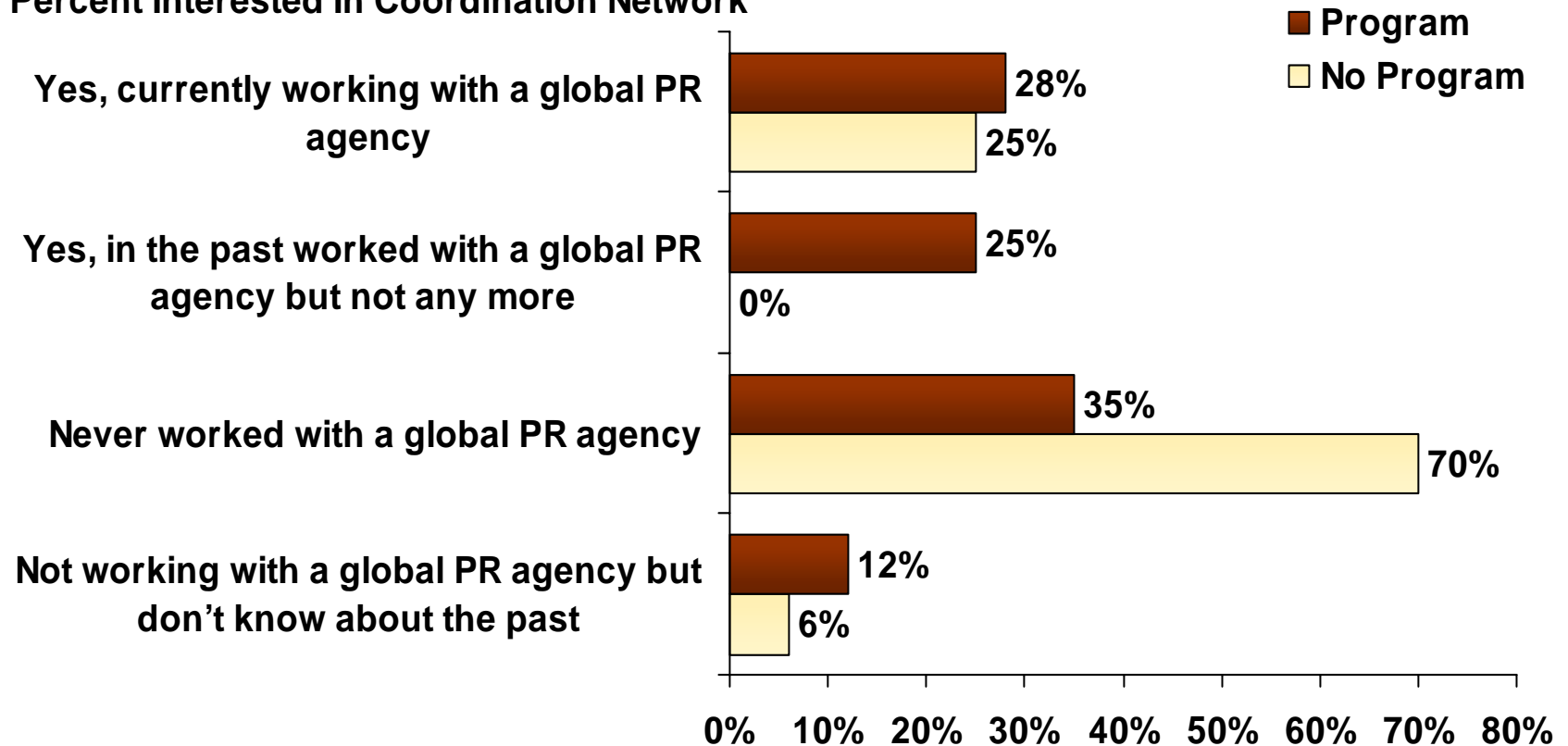
The median budget for companies without an international PR program was \$215-million; the median for companies with an international PR program was \$349-million.



Experience With Global PR Agencies

About a quarter of those with an international PR program currently use a global PR agency and another quarter have used a global agency in the past.

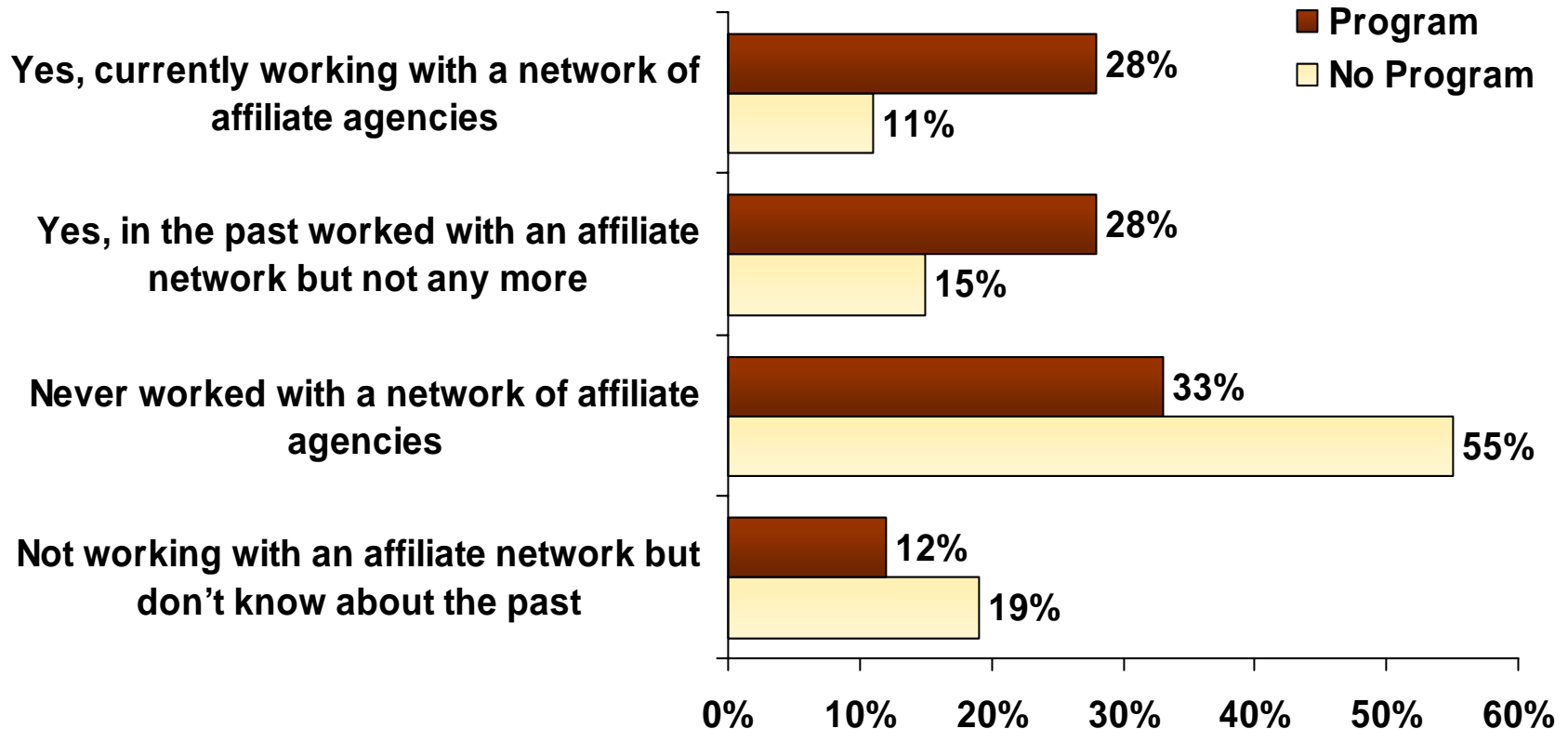
Percent Interested In Coordination Network



Experience With Affiliate Network Agencies

A little over a quarter of those with an international PR program currently use an affiliate network agency and a little over a quarter have used an affiliate network in the past.

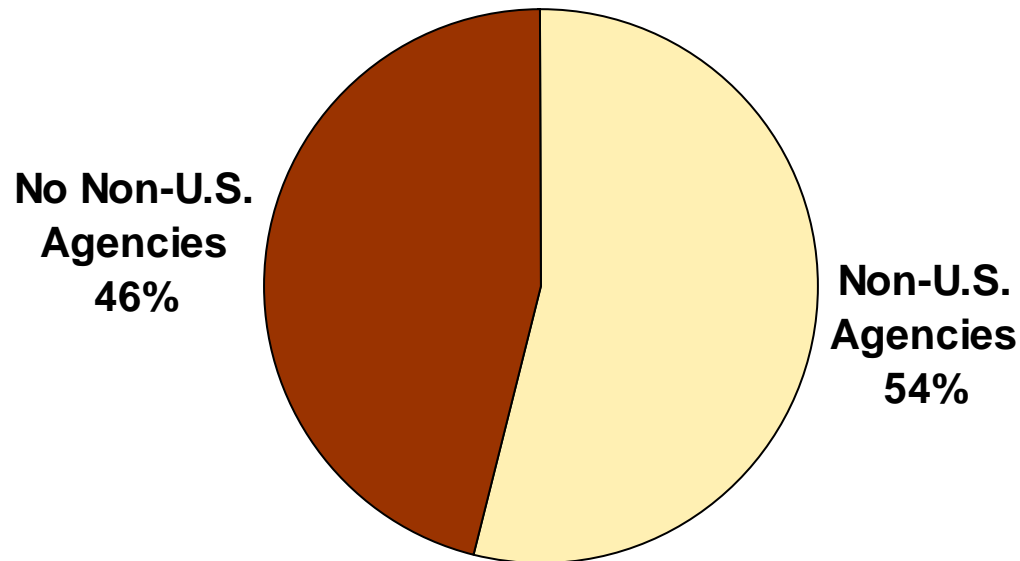
Percent Interested In Coordination Network



Percent Using Non-U.S. PR Agencies

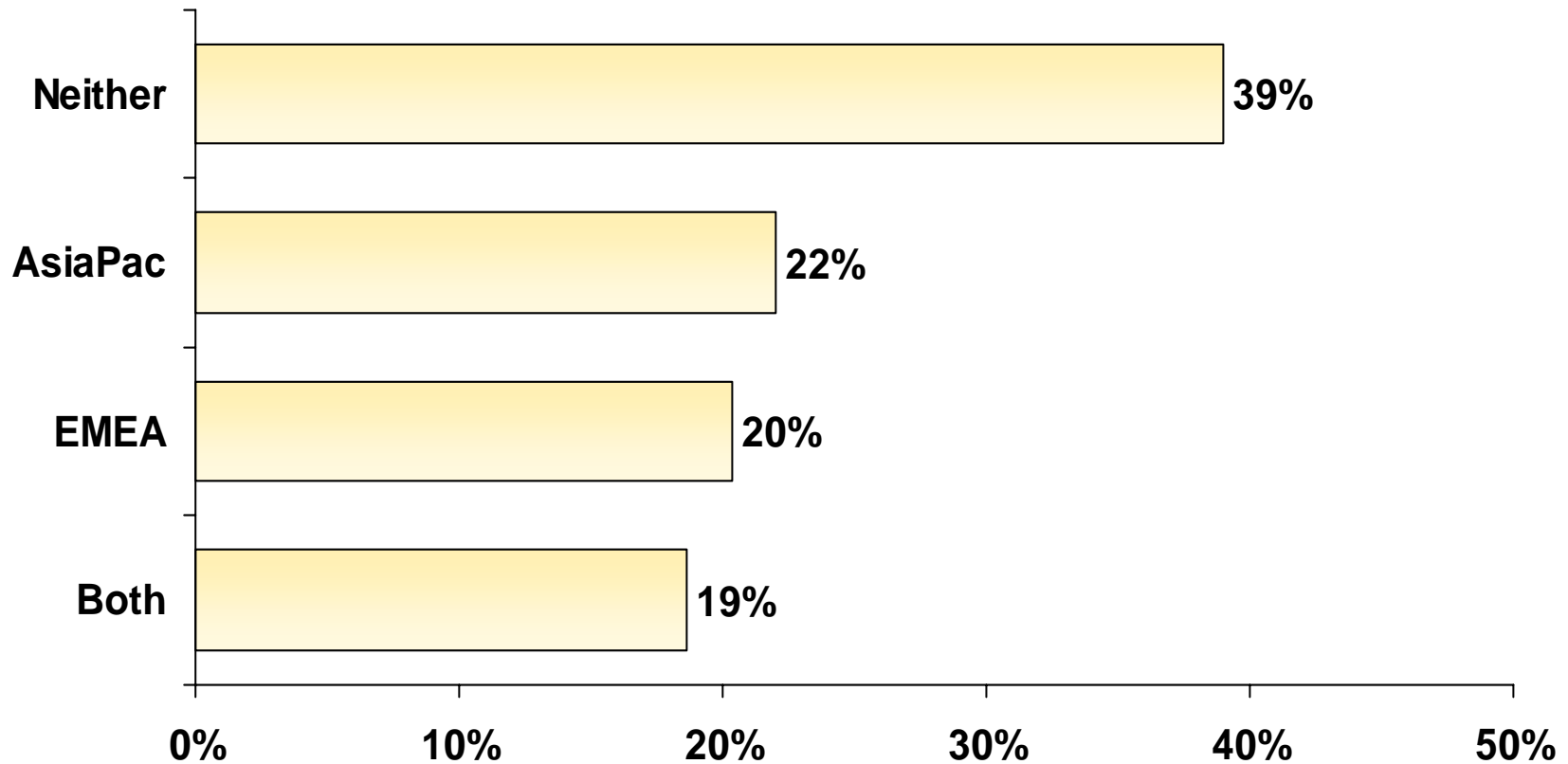
Of those who have an international PR program, a little over half use non-U.S. PR agencies in support of their global PR efforts.

Percent With Non-U.S. PR Agencies



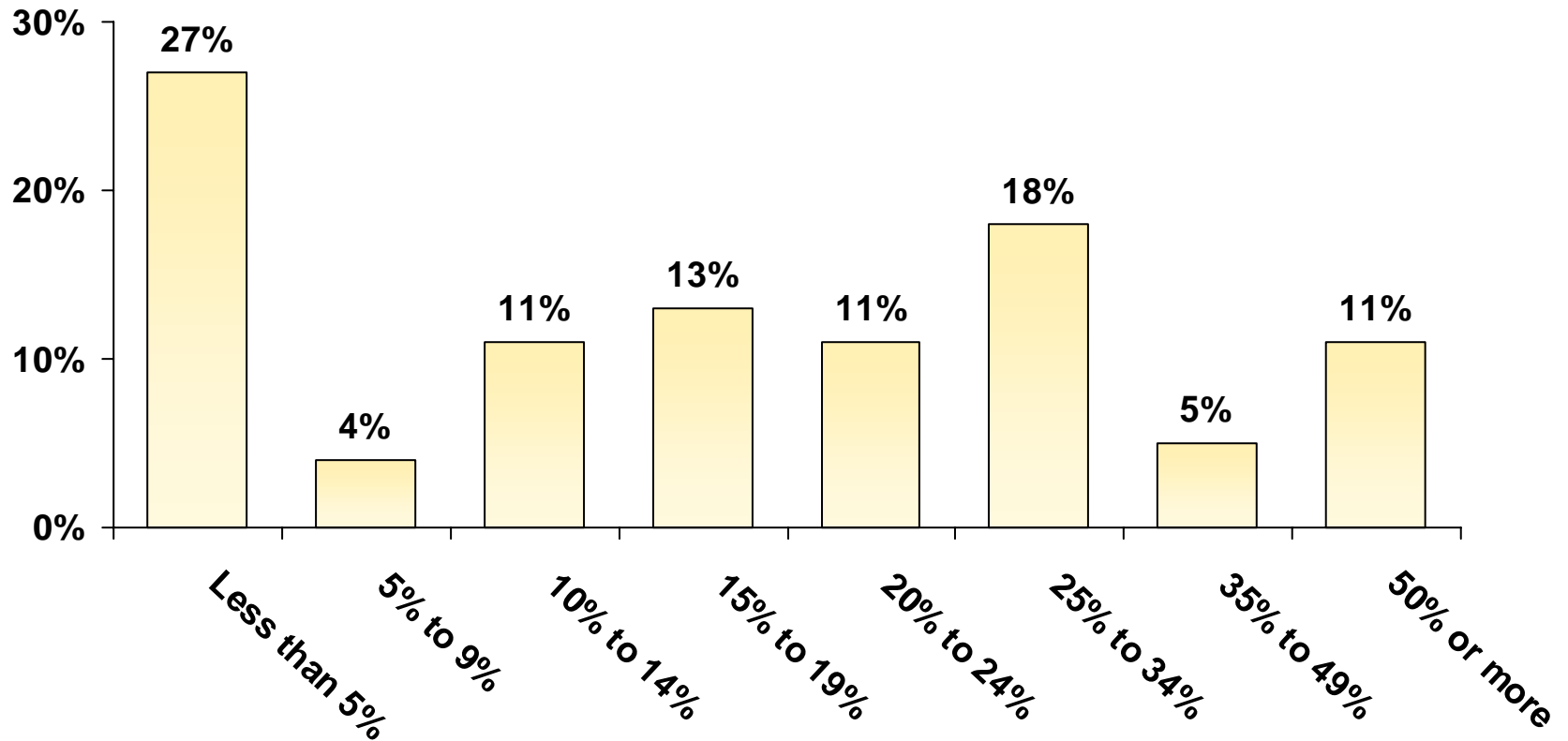
AsiaPac & EMEA PR Managers

Roughly the same percent have an AsiaPac PR manager and EMEA PR Manager. 19% have both.



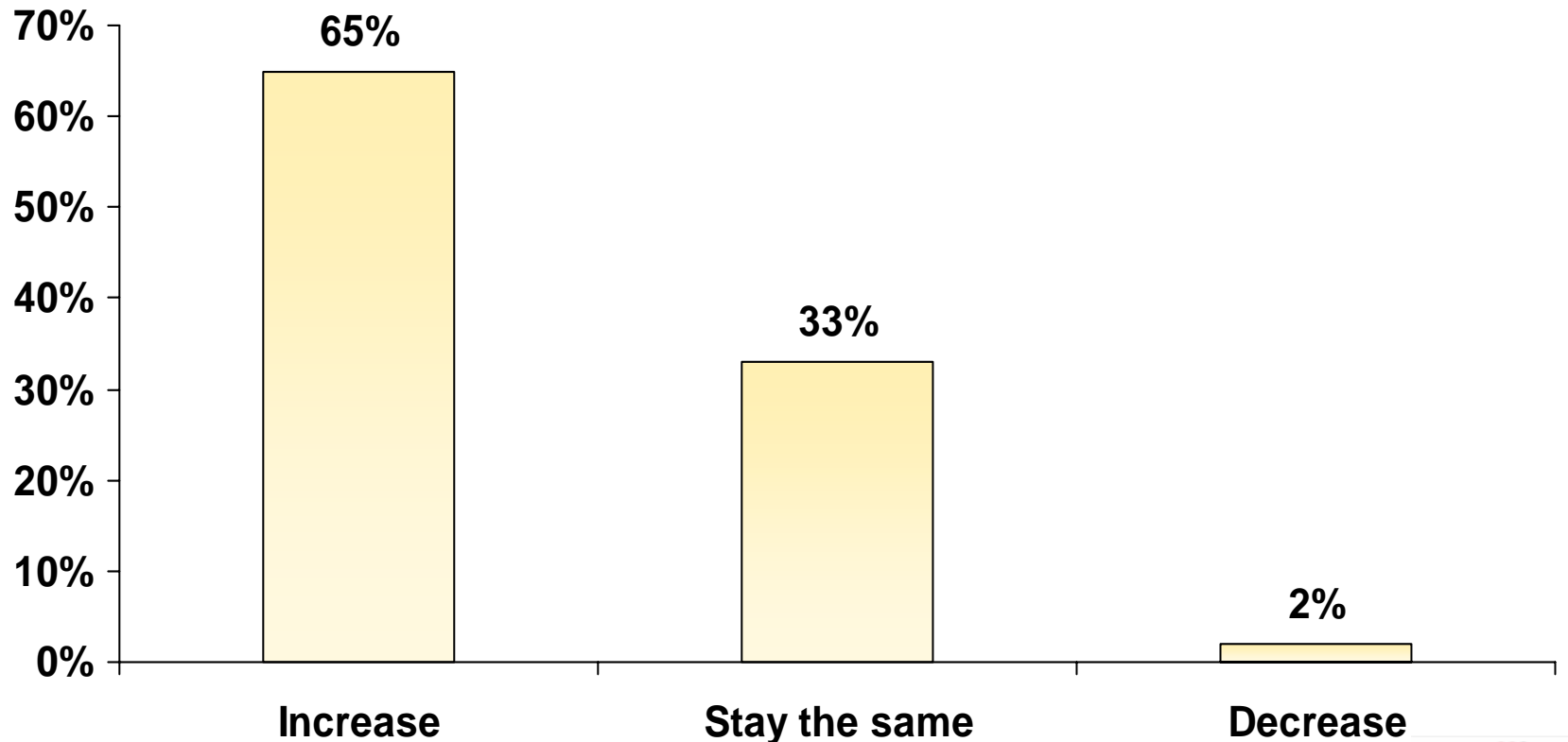
Percent Of PR Budget Spent Internationally

The median percentage of PR budgets spent on international PR was 17%.



Forecast For International Spending

Two-thirds of those with international PR programs foresee the percent of their PR budget spent on international PR to increase in the next 12 to 24 months. A meager 2% saw it decreasing.





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Comparing Those With vs. Without A Program



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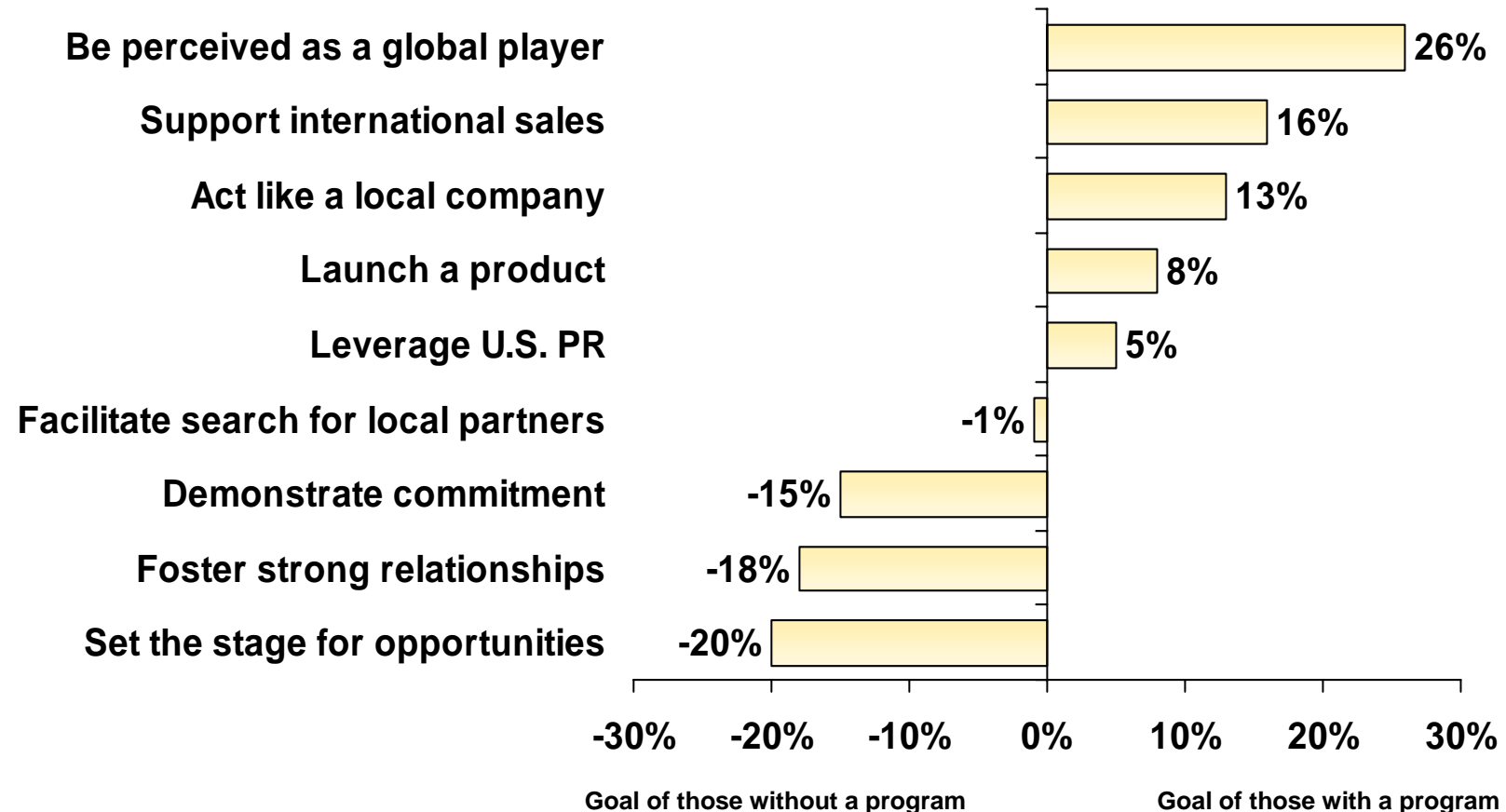
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Percent Difference In Goals Of International PR Between Those With vs. Without Programs

Respondents with no international PR program gave slightly fewer goals for such a program (2.8 vs. 3.0) but that difference does not explain the marked difference in priorities.

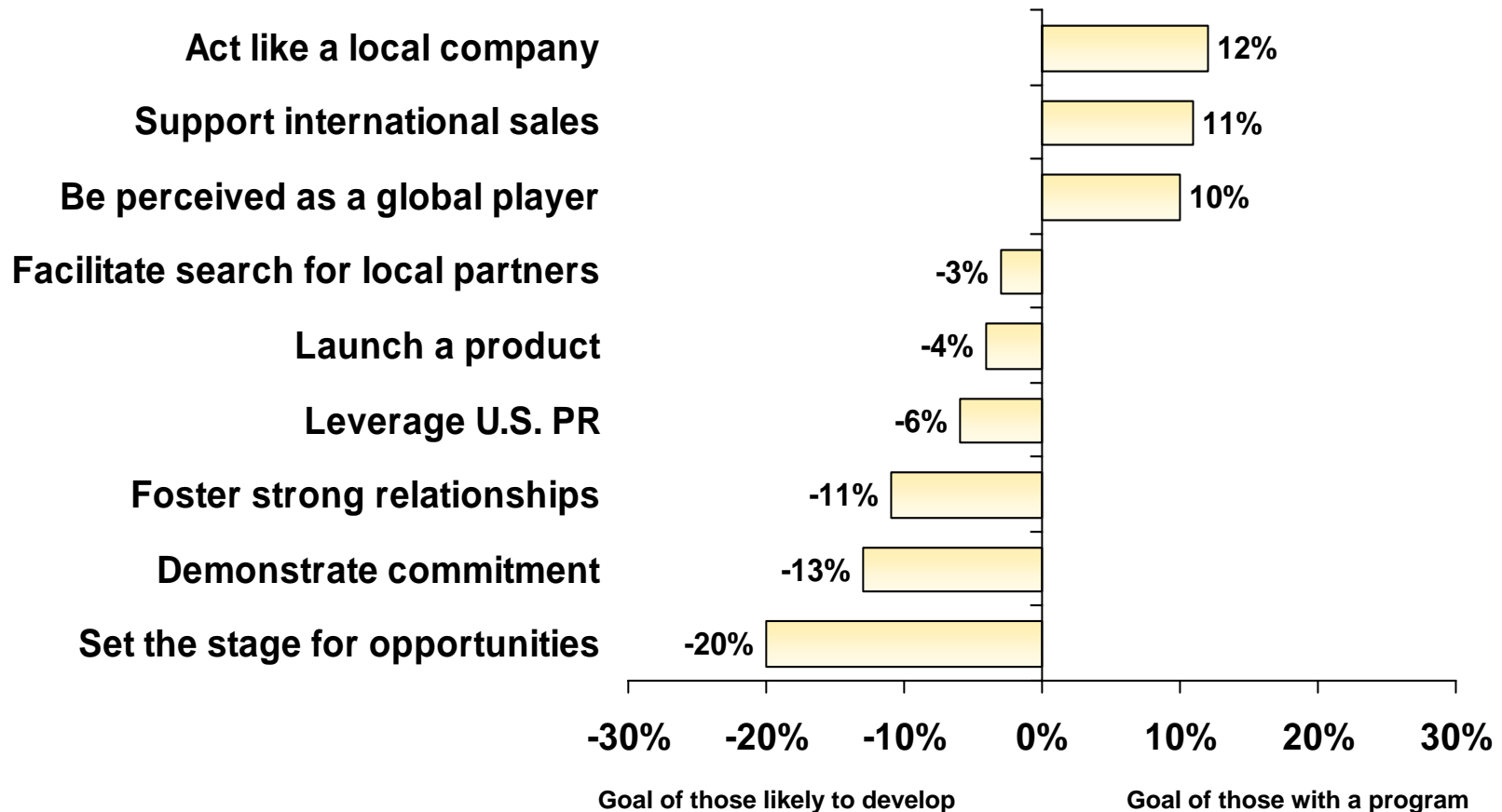
The largest difference was in the top goal of those with international programs: to be perceived as a global player.



Percent Difference In Goals Between Those With Programs vs. Those Likely To Develop

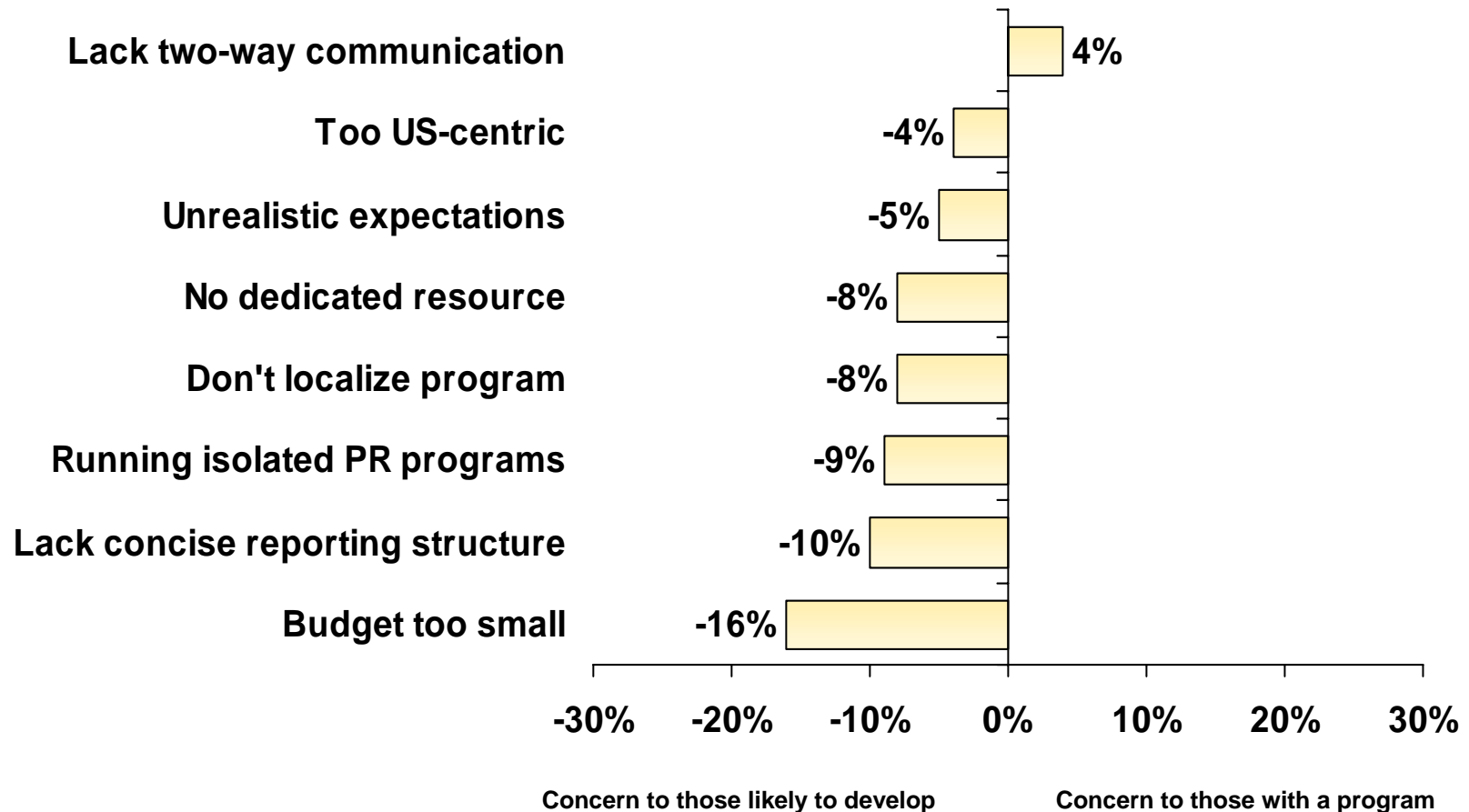
The goals respondents likely to develop an international PR program in the next 12 months foresaw for the program were more similar to those who already have a program.

More of those likely to develop a program foresaw less tangible goals such as setting the stage for business opportunities – goals that might help sell a program internally.



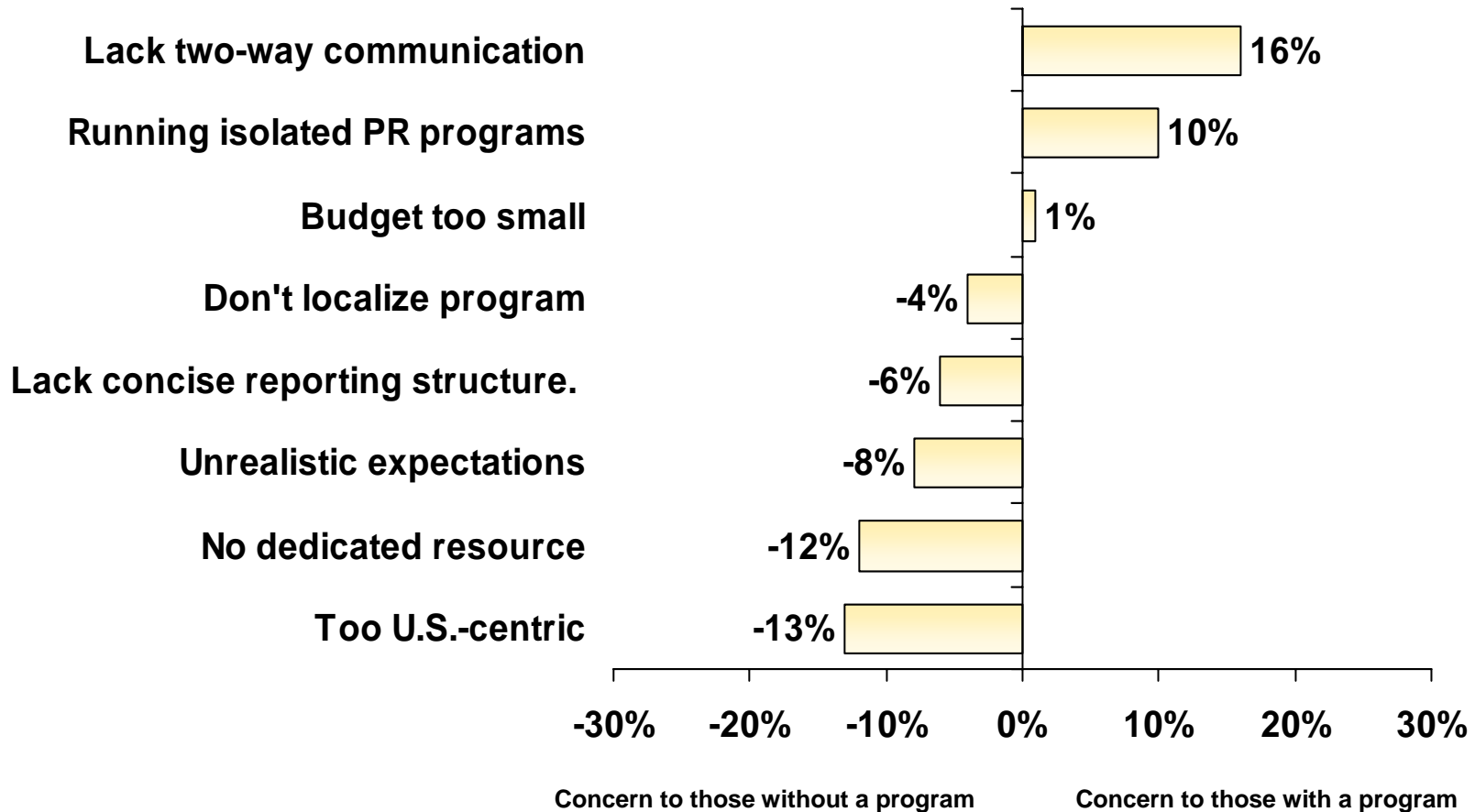
Percent Difference In Hurdles Between Those With Programs vs. Those Likely To Develop

Those likely to develop an international program have an even closer awareness of the real programs international programs faced; they are, however, more concerned about budget, perhaps because they are already fighting for money.



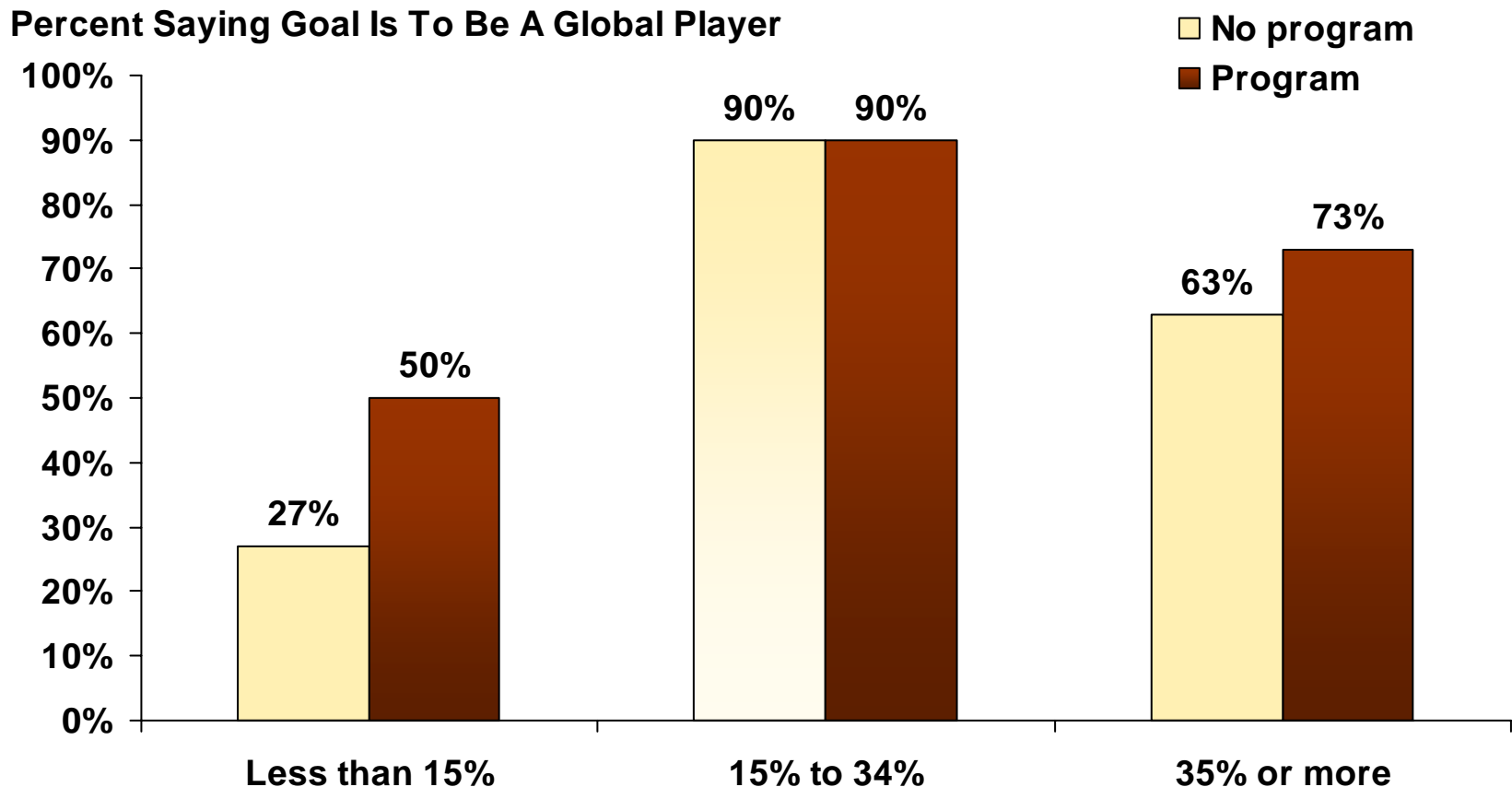
Percent Difference In Hurdles Between Those With vs. Without Programs

Those without international programs seem quite realistic in their anticipation of hurdles to a successful program; they are more concerned, however, with internal execution in terms of dedicated resources and U.S.-centric.



Percent Of Revenue From Out Of US And Wanting To Be Perceived As A Global Player

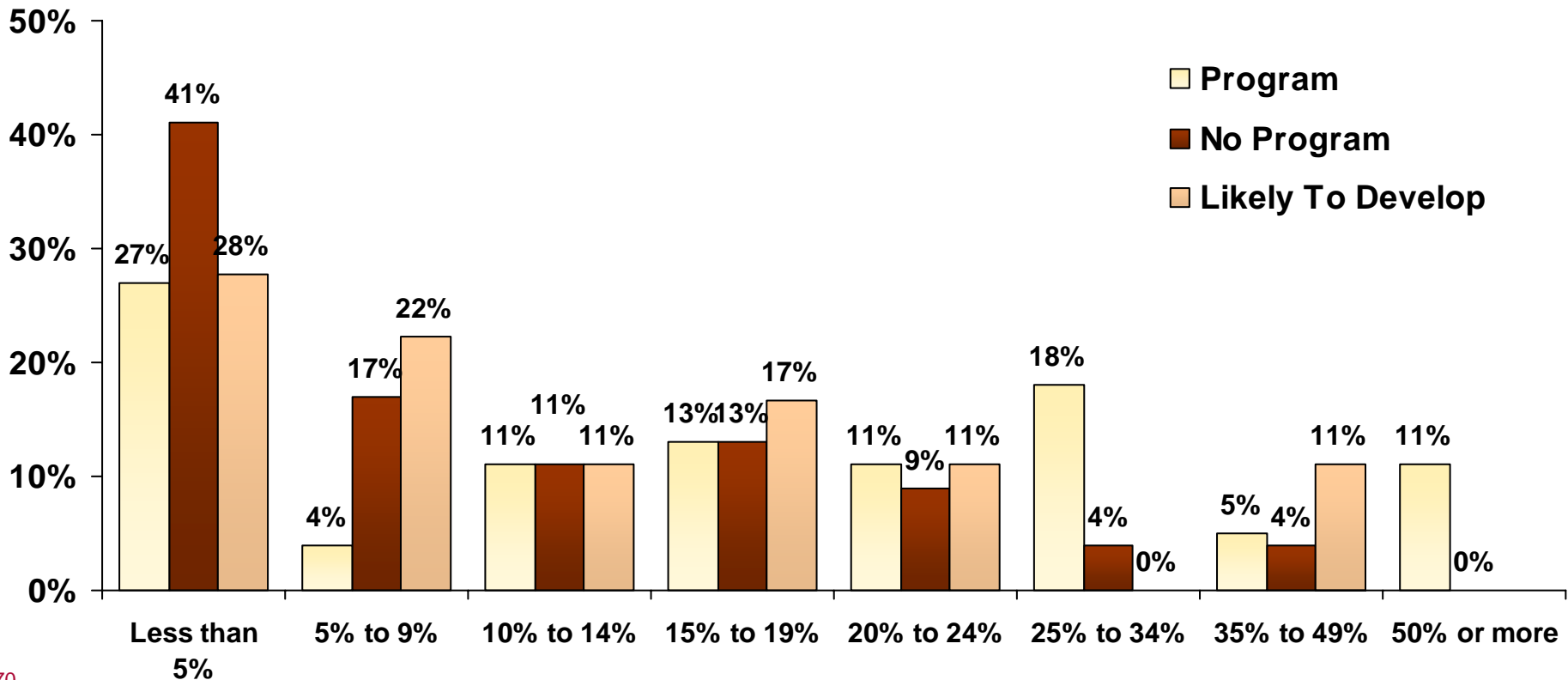
The higher percentage of revenue coming from non-U.S. sources the more likely respondents are to say their goal is to be perceived as a global player.



Percent Of PR Budget Spent Internationally Compared to Anticipated International Budgets

The median percentage of PR budgets those without a program anticipate spending on international PR was 7% compared to 17% for those with current programs.

The median percentage of PR budgets those likely to develop a program in 12 months anticipate spending on international PR was 9%, still below those with a program.





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Interest In Coordination Network Model



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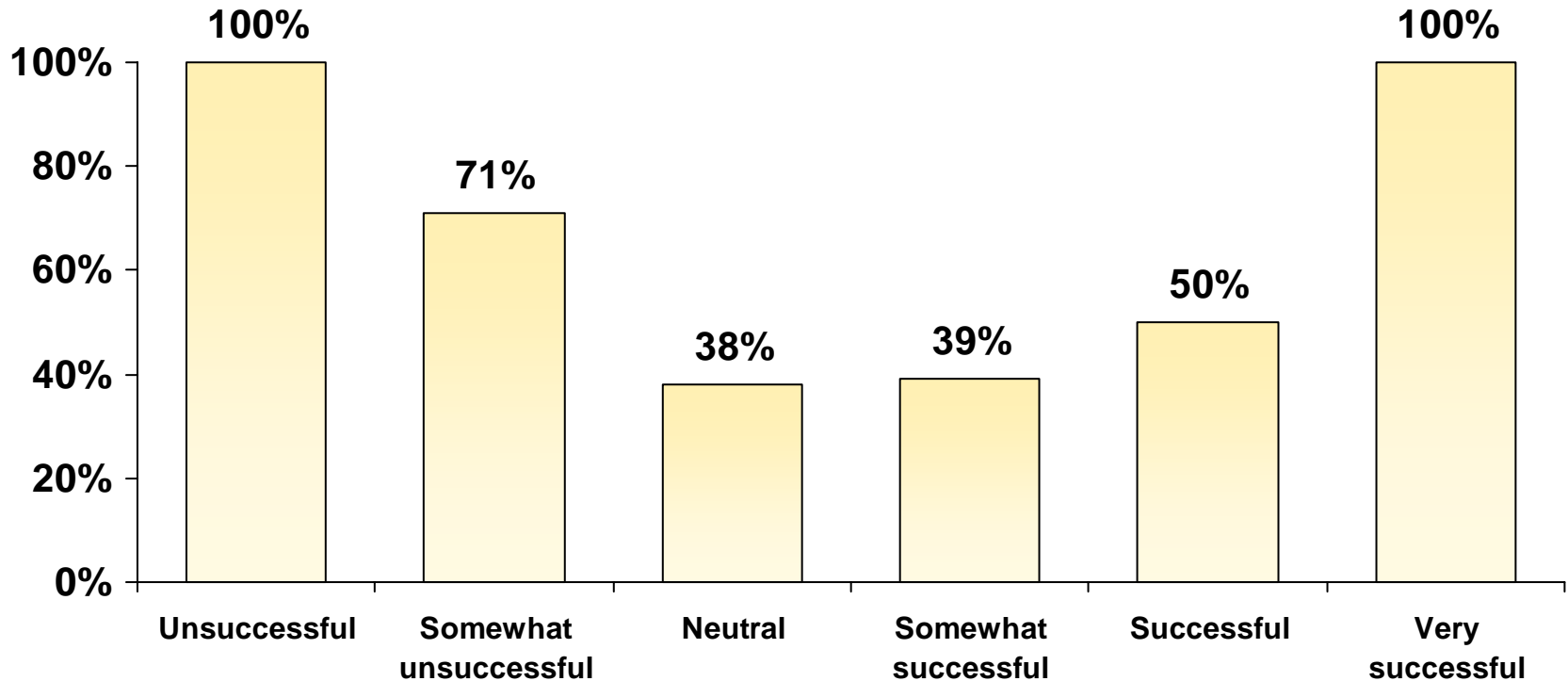
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Interest In Coordination Network By Success Of International PR

It's rare that we encounter such a clear curvilinear relationship (although the extremes represent small samples).

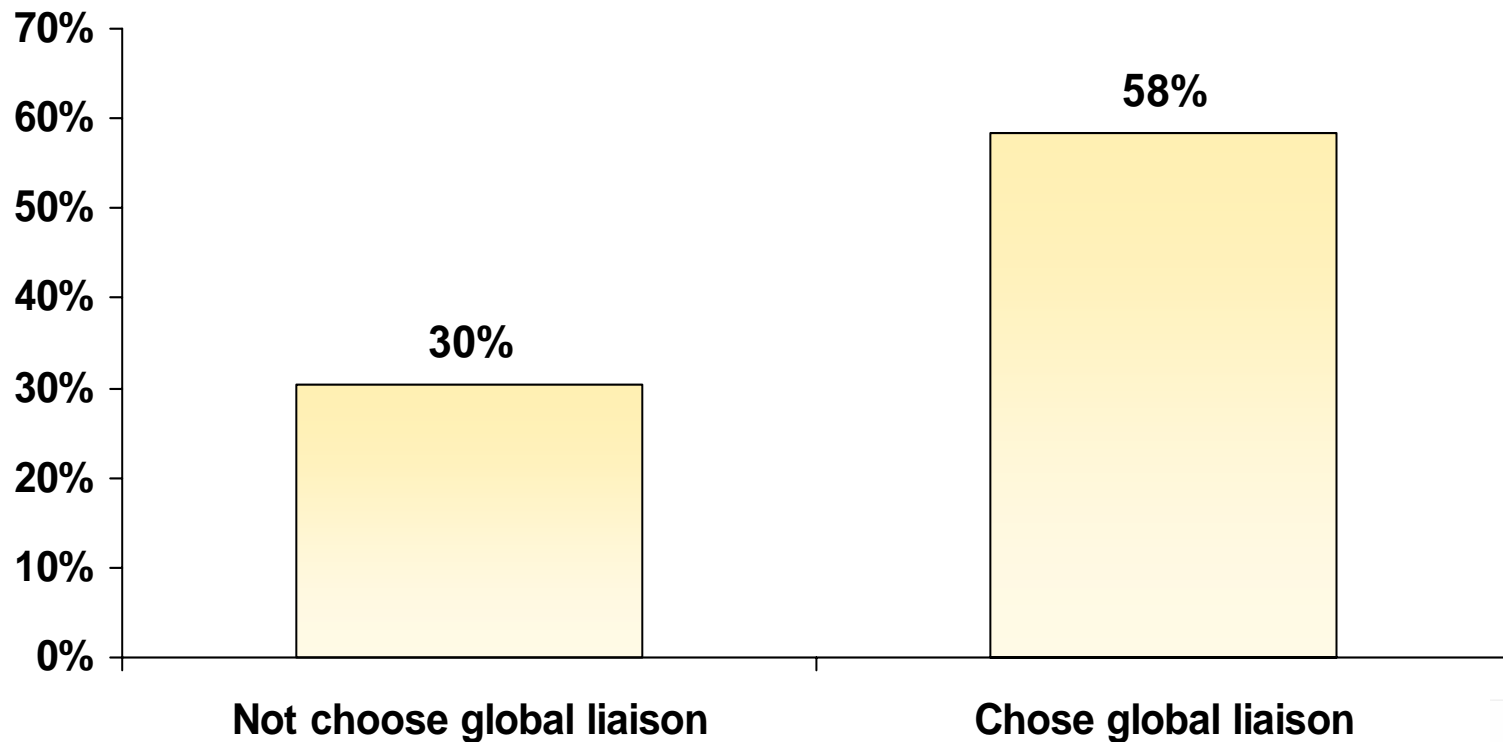
Percent Interested



Interest In Coordination Network And Beliefs About Ways To Insure Adherence To Strategy

Belief in only one strategy for insuring that everybody adheres to a single strategy was correlated to interest in the Coordination Network Model; luckily, it was the relationship that makes most sense (i.e., appointing a global liaison to manage communication.)

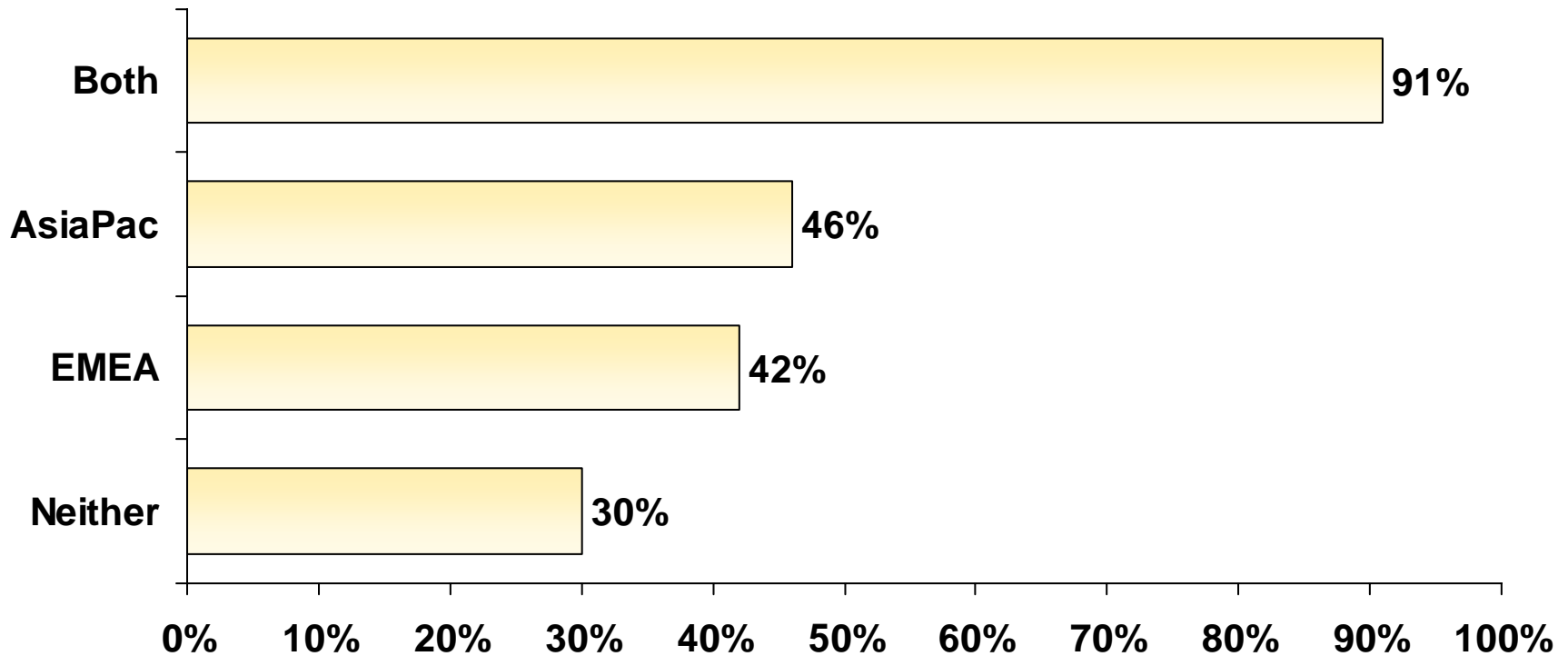
Percent Interested



AsiaPac & EMEA PR Managers And Interest In Coordination Network Model

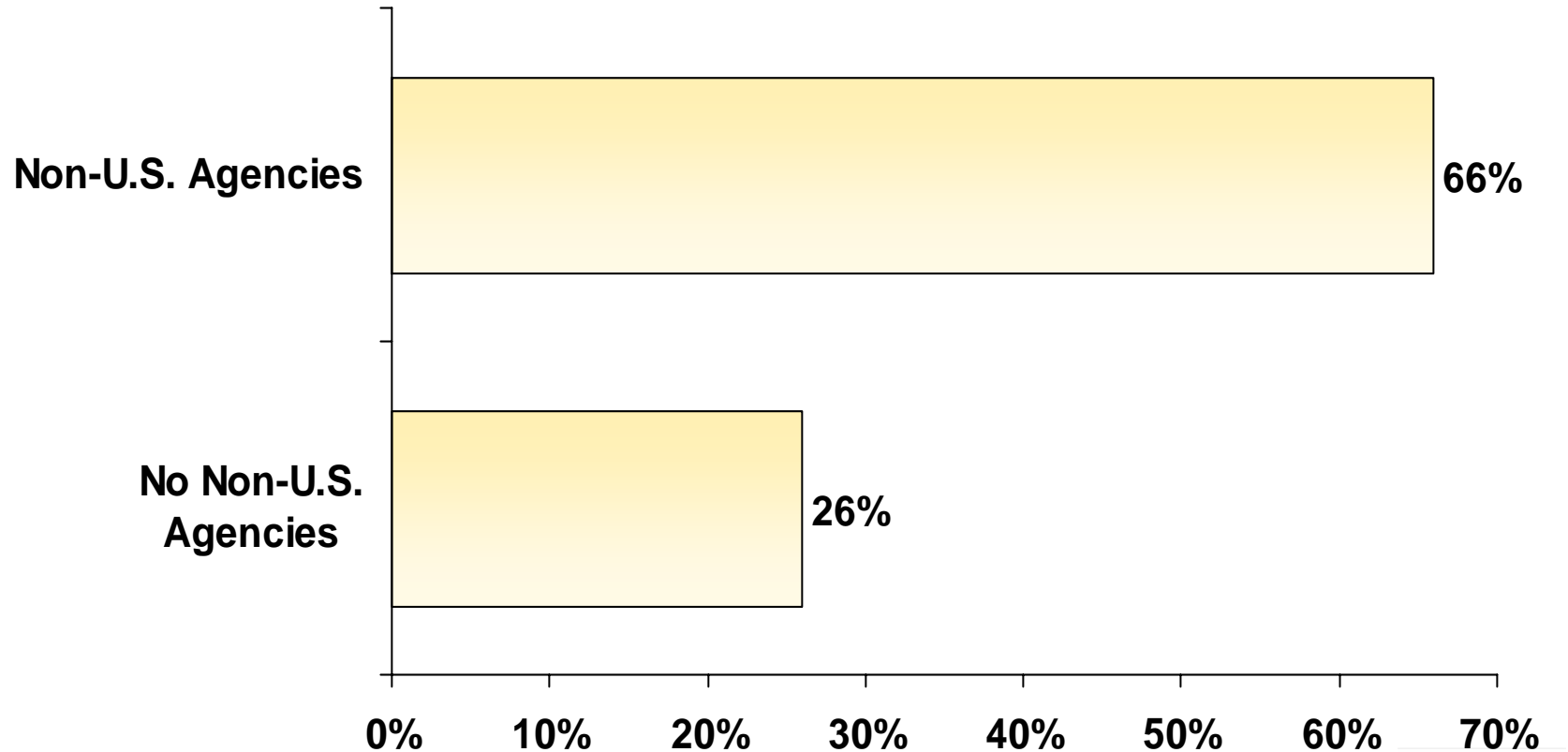
Whether a company has a manager dedicated to EMEA or AsiaPac strongly influences interest in the Coordination Network Model; in particular, those companies that have both.

Percent Interested



Non-U.S. Agencies & Interest In Coordination Network Model

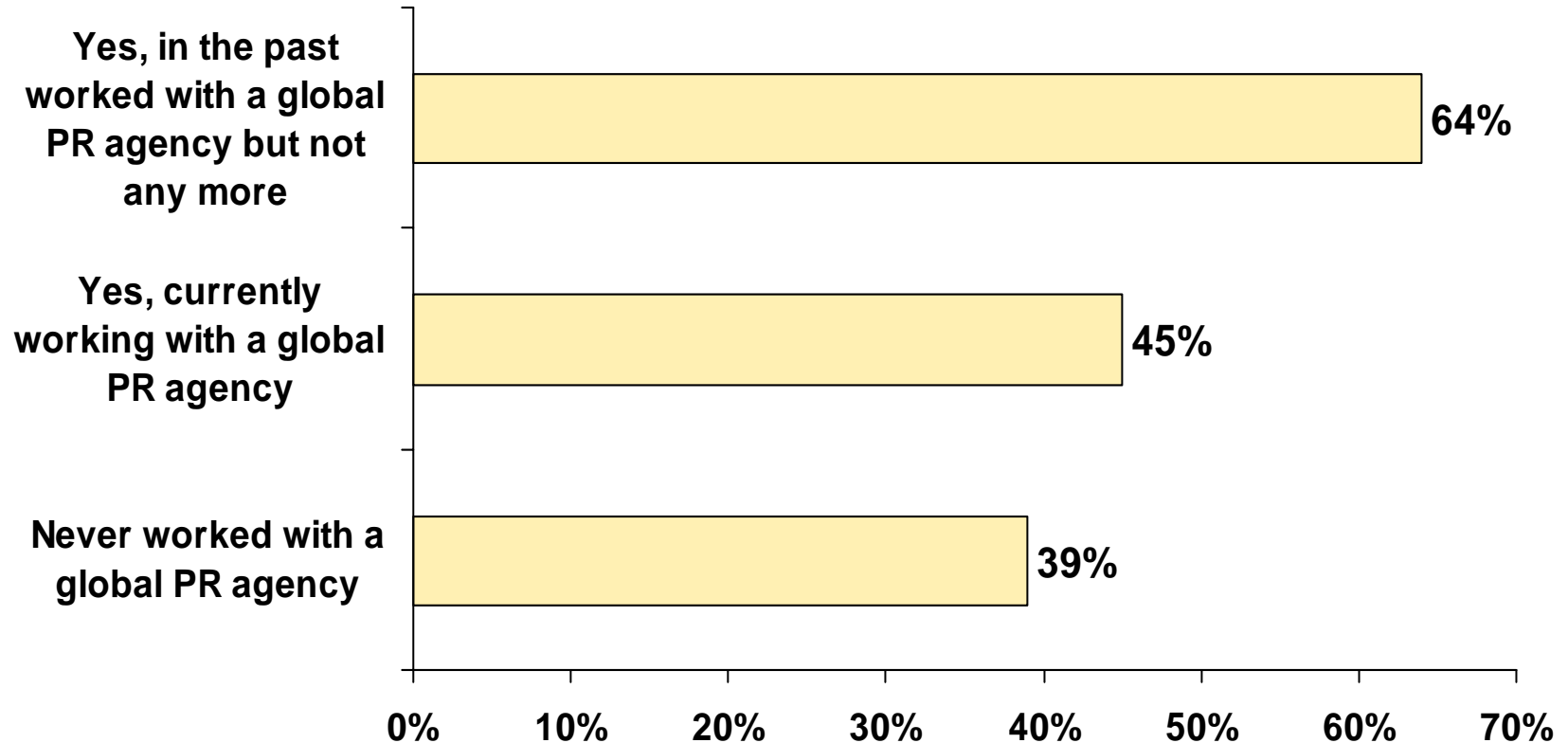
Of companies with an international PR program those with one or more non-U.S. PR agencies supporting their global PR efforts are much more likely to be interested in the Coordination Network Model.



Experience With Global PR Agency And Interest in Coordination Network Model

Those who worked with global agency in the past are more interested in the coordination network than those who are working with a global agency now or never worked with one.

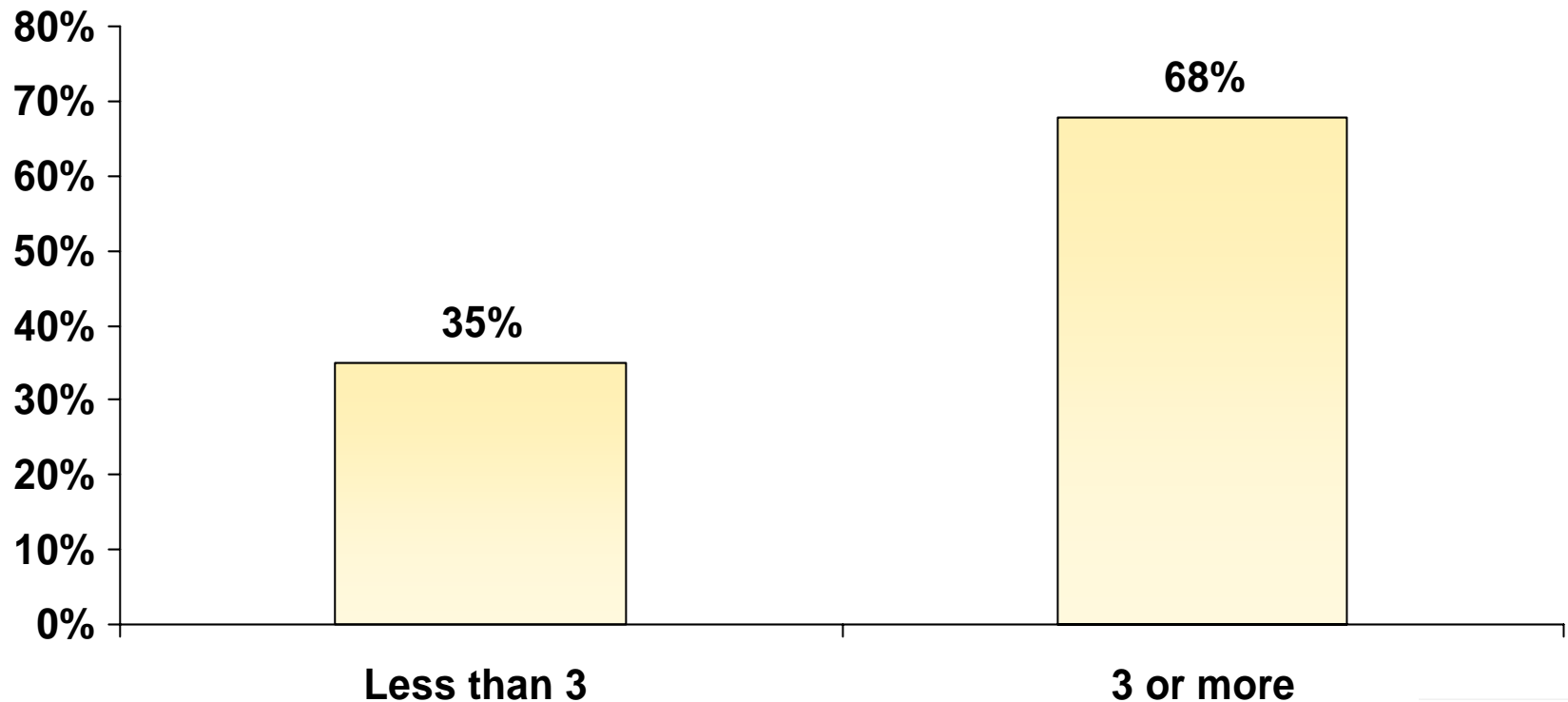
Percent Interested In Coordination Network



Interest In Coordination Network And Number Of External Agencies Used

Companies that use more than 2 external agencies were more likely to be interested in the global coordination network model.

Percent Interested





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Importance of Model Benefits



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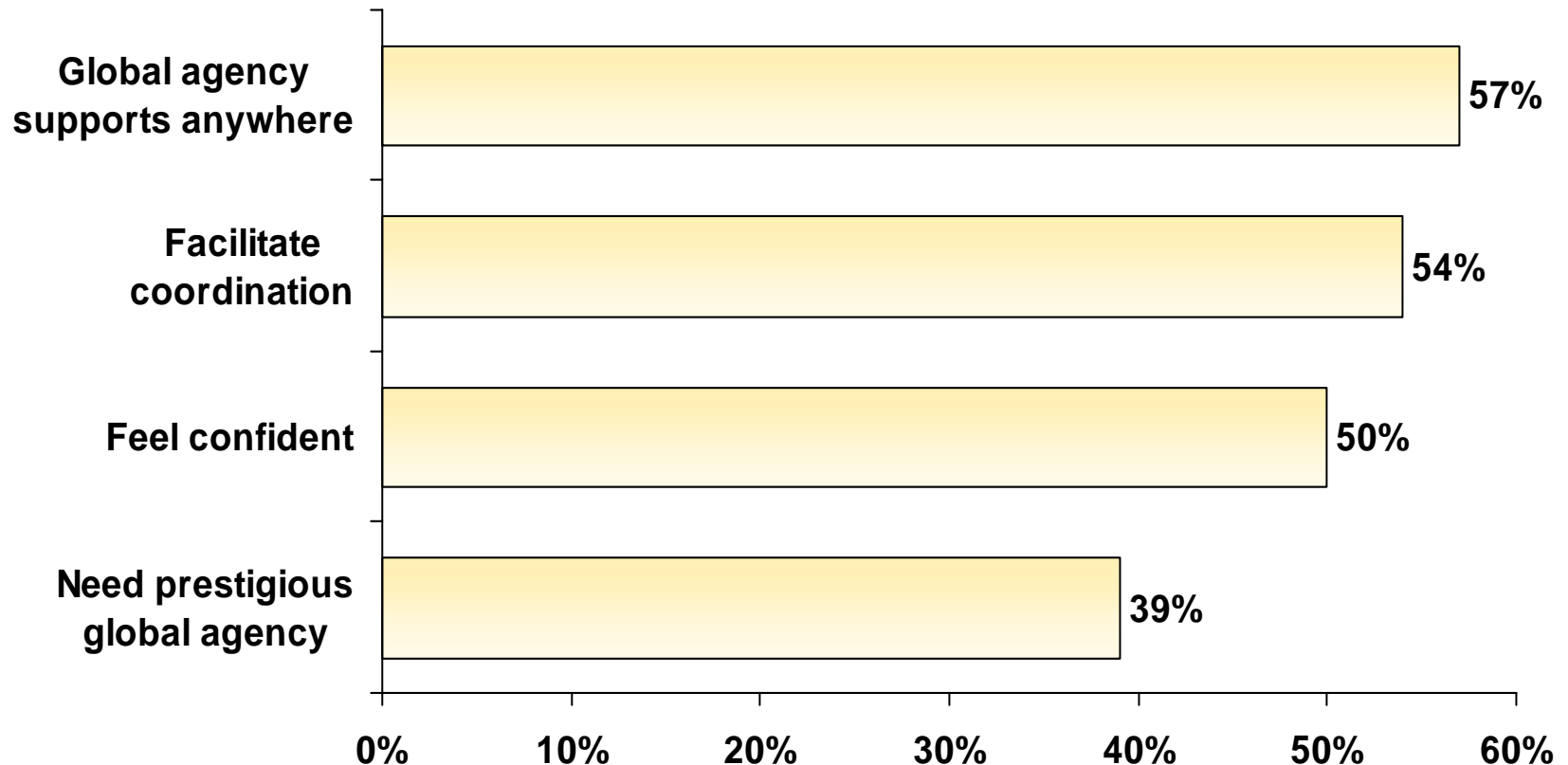
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Importance of Benefits of Global Agency Model

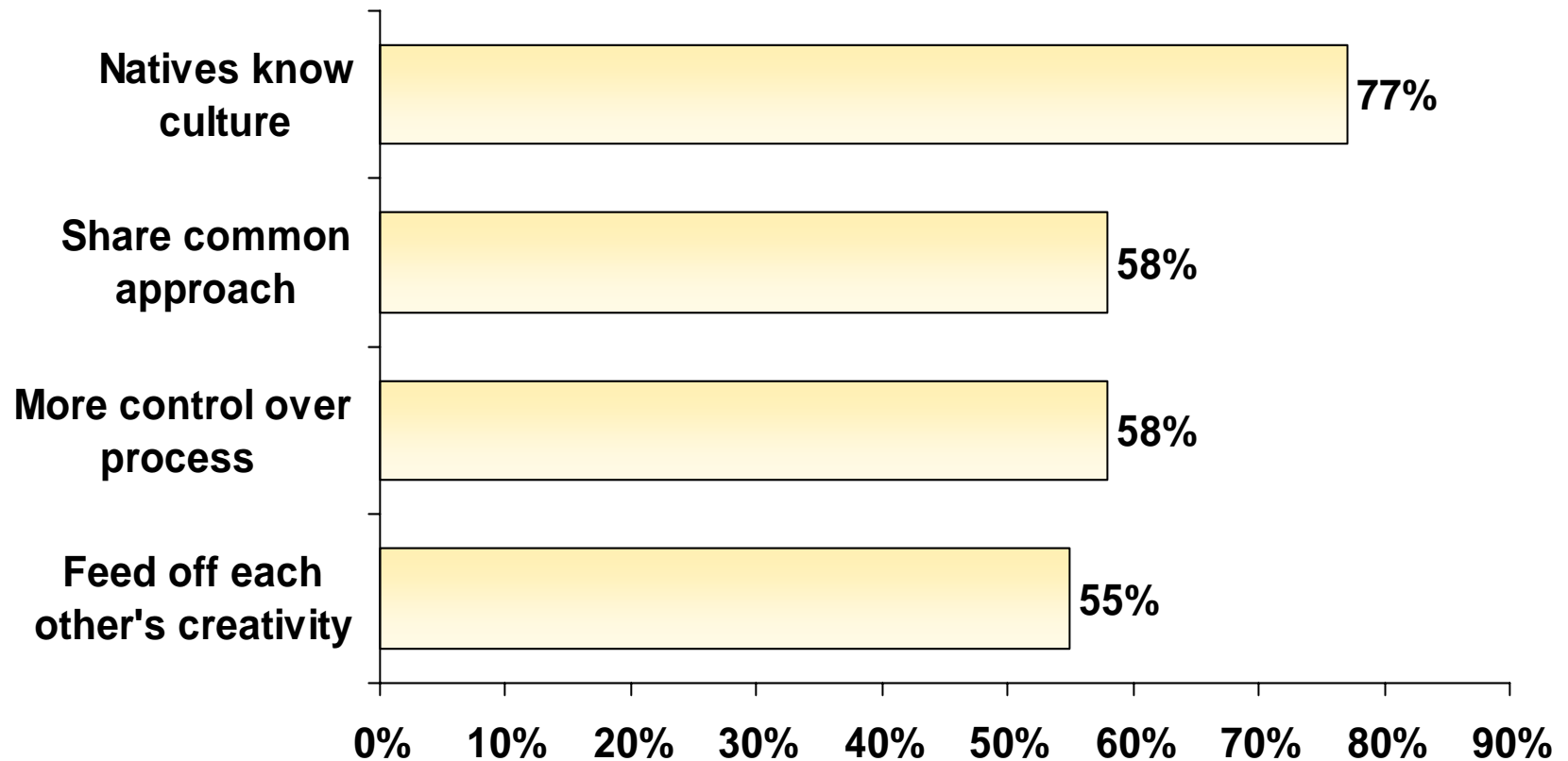
The top benefit of the global agency model is that the agency can support them anywhere with ease of coordination and communication a close second.

There was slightly less agreement on the most important benefits of the global agency model than for the other two models.



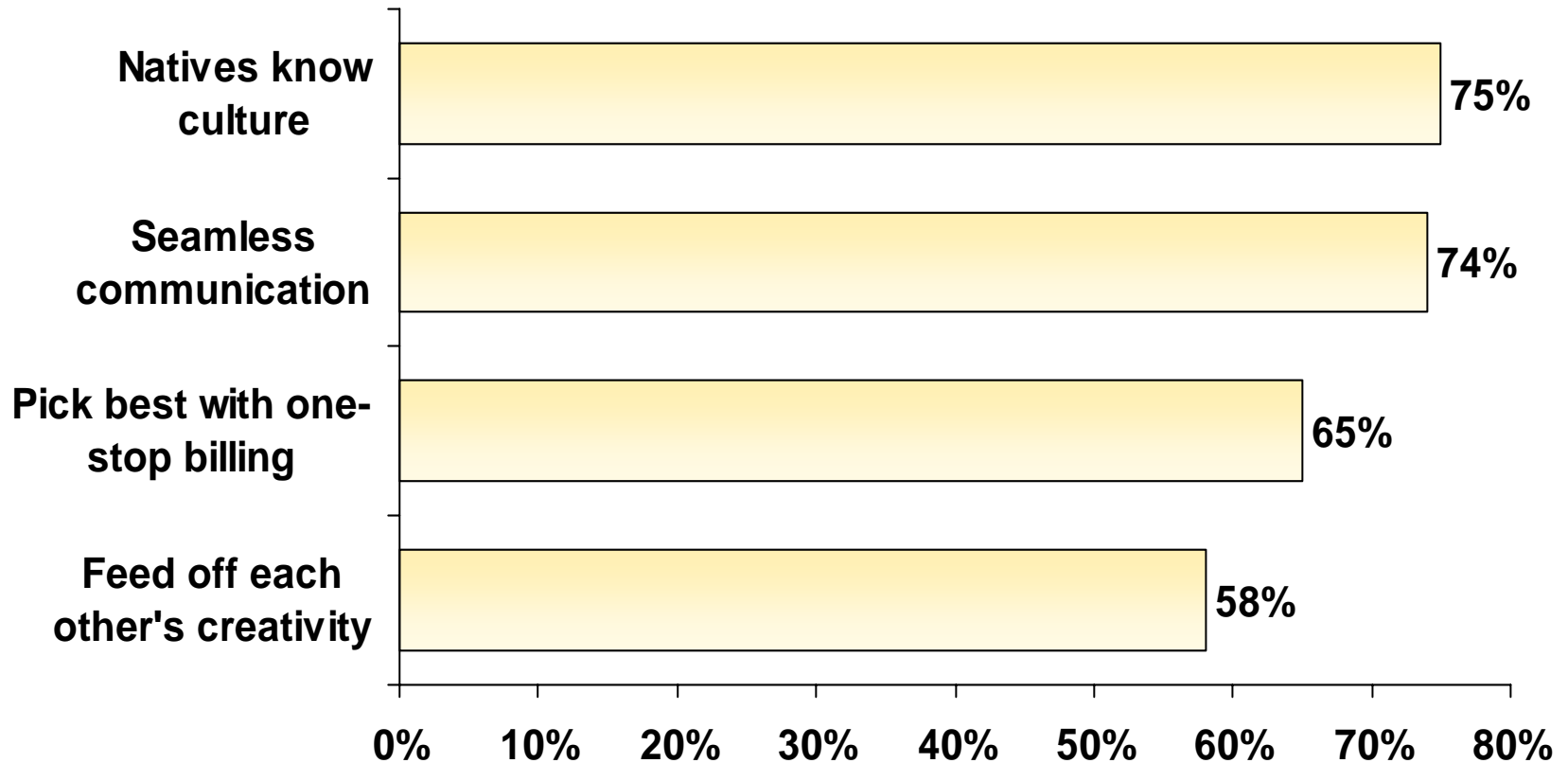
Importance of Benefits of Best-of-breed Affiliate Model

The top benefit of the best-of-breed model is that local agencies employ natives who know the culture.



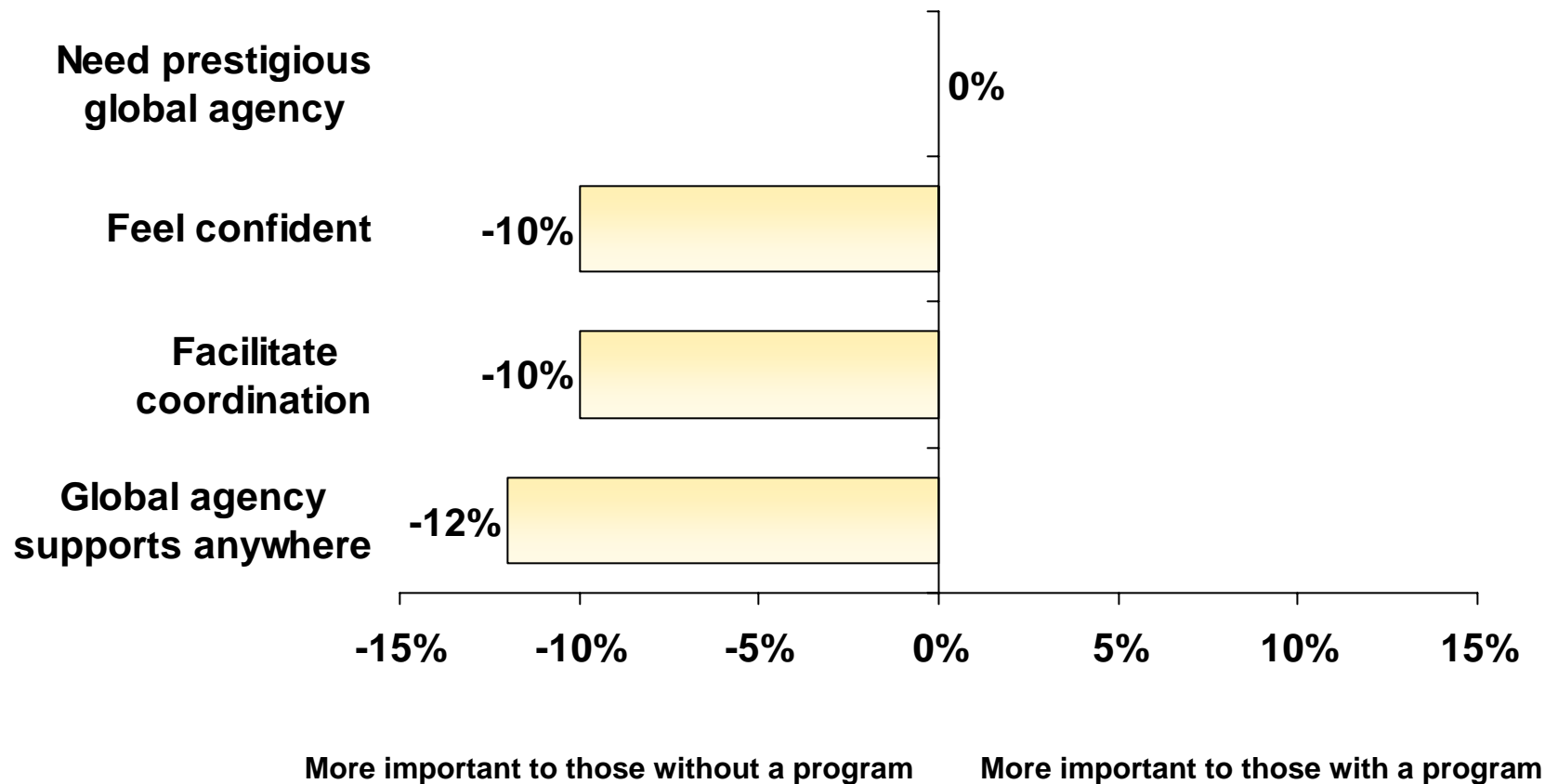
Importance of Benefits of Global Coordination Network Model

The top benefit of the coordination network model is that local agencies employ natives who know the culture but also that a global coordinator ensures seamless communication.



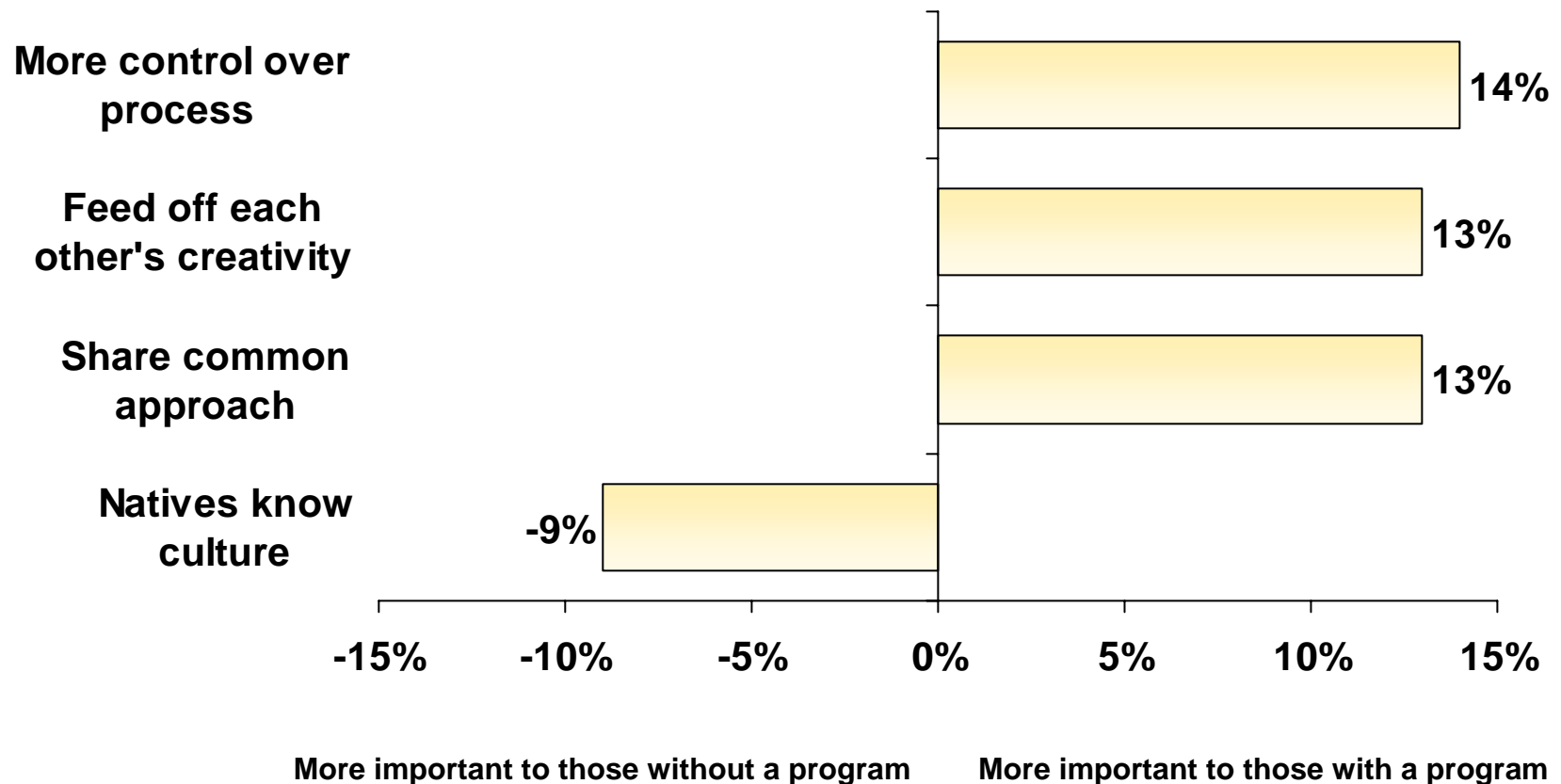
% Difference No Program vs. Program Benefits of Global Agency Model

The benefit of a global agency supporting them anywhere was slightly less important to those without a current international program.



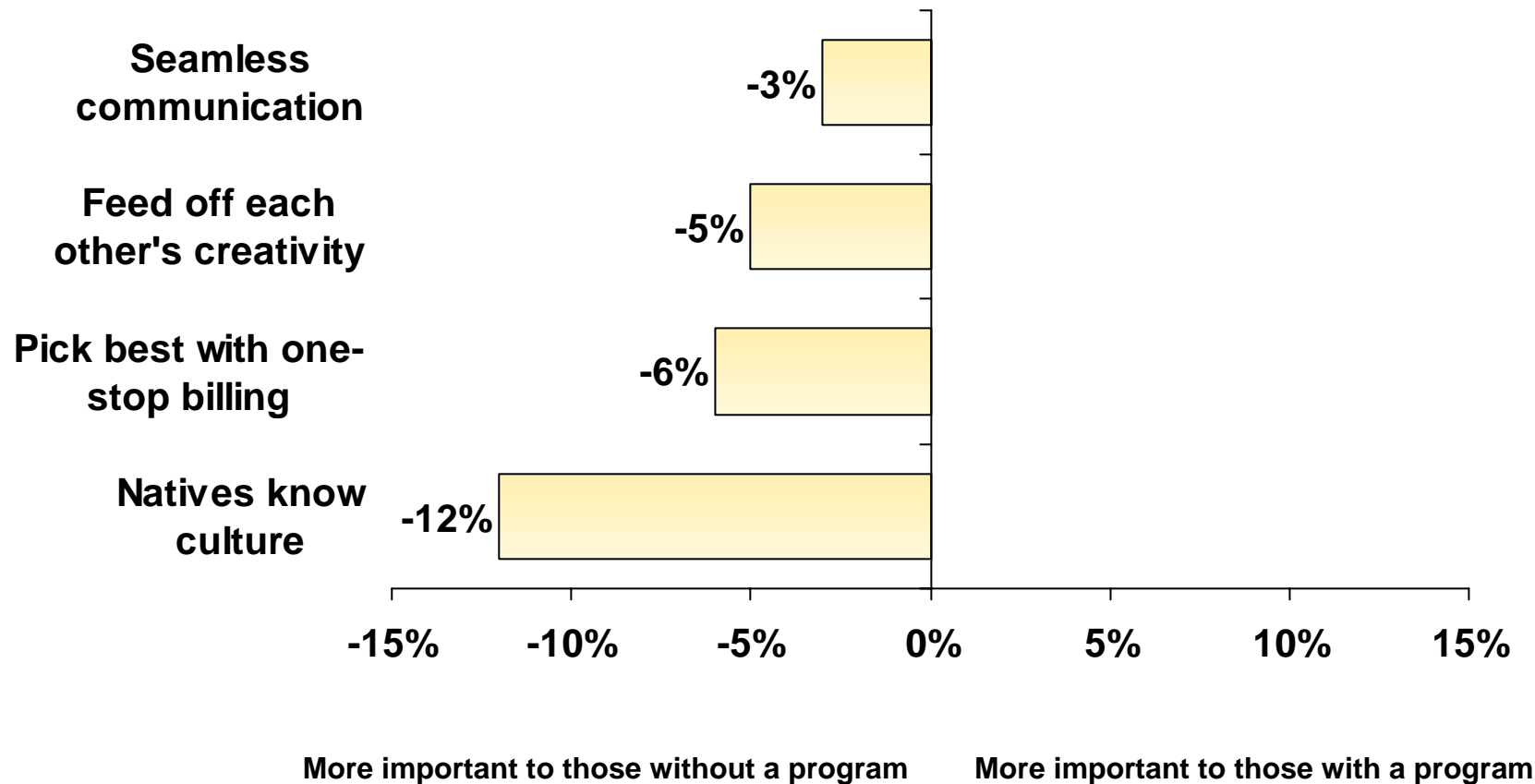
% Difference No Program vs. Program Benefits of Best-of-Breed Affiliate Model

Those with a current international PR program placed more importance on control and process.



% Difference No Program vs. Program Benefits of Global Coordination Model

Those with a current international PR program were slightly less convinced of the importance of natives knowing the culture.





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Thank You!



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