



2007 年上海伦敦广告论坛  
SHANGHAI LONDON ADVERTISING FORUM 2007

**THE REPORT**

# SLAF 2007 THE REPORT

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# OVERVIEW

## AIMS

## ACHEIVED?

Show Shanghai's advertising agencies and production companies how enthusiastic APA members are about working with them.



Enlighten Shanghai's advertising community as to the expertise APA members offer.



Address perceptions about UK production that might effect the likelihood of the Shanghaiese working with them.



Make as big an impact as possible in Shanghai by staging the best advertising event ever seen there.



Enable the UK delegates to gain rich insights into the opportunities to work with the Shanghaiese, and any obstacles they may need to overcome.



Start building relationships between Shanghai advertising & production companies and London production & post-production companies.



# INTRODUCTION

The APA is the UK trade body for commercials production, post-production, editing and music production companies in commercials. Its purpose is to do everything it can to assist its members in their business objectives.

That includes helping them to understand and connect with new markets, as well as promoting them in those markets.

The APA's first major event to achieve these goals was in Japan in 2004, where a party of 33 people from the APA membership attended a series of events in Tokyo.

The APA created the Shanghai London Advertising Forum 2007 to do something similar in Shanghai: to enable its members to understand the commercials market there, to make connections and start to build business relationships with agencies and production companies there, and to promote the expertise available in London.

The SLAF 2007 enjoyed the support of UK Trade & Investment and the British Consulate, Shanghai which greatly contributed to its success.

# BACKGROUND

The APA's objective is to help its members develop new markets; whether in the UK, through markets in new media for example, or overseas.

APA members are renowned for the quality of the commercials they produce, but many of them are small businesses, where overheads have to be kept to a minimum. Their efforts are focussed on producing the work they already have, at the best possible quality, as well as on winning new projects. They do not have the resources to engage staff to investigate and develop new markets outside the UK.

So the APA assists them by investigating new markets, and then organising events enabling them to learn about those markets, and to develop business relationships with people in them.

The first major overseas delegation of APA members was to Japan in 2004. That was a great success in terms of the impact made, the knowledge the delegates accrued, and the relationships they created. Delegates to Tokyo undertook productions of a substantial value following the trip: particularly the companies which chose to pursue the contacts they developed while there.

Japan was a useful learning exercise and drawing from that we decided to organise the delegation to Shanghai very differently. Instead of visiting agencies and giving them presentations, we would do all the presentations in one venue, enabling us to develop a really coherent programme.

Based on the experiences in Tokyo, and the preliminary visits of APA CE Steve Davies to Shanghai last year, we created a programme which would address issues that Chinese agencies and production companies were likely to have. We also chose to invite Chinese agencies and production companies to present, helping us to learn from them, and making sure it was their event too.

# AIMS OF SLAF 2007

- 1.** To enable APA members to learn about the potential market for their services from Chinese agencies and production companies: a real understanding of the market being a pre-requisite to developing business.
  
- 2.** To demonstrate to Chinese agencies and production companies that:
  - (i)** We have a wealth of expertise in commercials production and post production
  - (ii)** We are approachable and genuinely committed to working with them
  - (iii)** We are not trying to persuade them to shoot in the UK, which they know is an expensive place to shoot; but to utilise our expertise to produce wherever is the most appropriate, as we do with commercials from UK companies
  - (iv)** That it is not all about big budgets: we are flexible and work on a wide variety of budgets, as governed by what is appropriate for the idea

# PRESENTATIONS

To enable us to meet those objectives, we planned a programme of presentations from Chinese and British delegates.

The speaker list was a dream team: we got all the speakers we wanted – the best variety and quality of speakers possible – and thus offered the best possible programme to potential delegates.

Inviting Chinese agencies and production companies to present communicated that this was their event too, which encouraged Chinese agency and production company staff to attend.

Speakers from the Chinese agencies and production companies were given the brief of explaining:

- advertising and production in China
- the ethos of their organisation  
(which generally meant showing some work)
- what they were looking for in overseas production/post companies
- what the obstacles are that must be overcome

The Chinese speakers were of the highest calibre, offering genuine insights into the Chinese economy, Chinese business culture, national and international brands, advertising in China, production in China, and the opportunities and obstacles for APA members.

**These were the Chinese speakers:**

**Kitty Lun** CEO, Lowe China

**Carol Potter** CEO of BBDO, China

**Yang Yeo** Chief Creative Officer, JWT, Shanghai

**Norman Tan** Executive Creative Director, Bates Asia

**Kunal Sinha** Executive Director, Ogilvy Discovery China

**Anthony Tse** MD, Cheers Films, China

**Scott Spirit** China Strategy Director, WPP

**Kel Hook** MD, Weiden + Kennedy, Shanghai

**Sheung Yan LO** Executive Creative Director, N.E. Asia, JWT

**Jonathan Chajet** Asia-Pacific Strategy Director, Interbrand

**Johhny Tan** Creative Director, BBH

**Ben Zhang and Mark Chang**, MD/Producer, Gwansti

**Sally Fu** MD 21+

You can read about the key points from the Chinese speakers' presentations in [20 things we learnt](#) (page 13).



# UK DELEGATES

UK speakers prepared presentations as part of a coherent strategy reflecting the aims of the event (as on page 7).

## **Dave Waters** Freud Communications

Explained what made UK production brilliant, and showed great commercials.

## **Tim Katz** Knucklehead

Explained how UK production companies shoot commercials around the world: choosing whichever location provides the best creative solution, taking into account the budget. This answered the concern of the Chinese agencies and production companies that shooting in London is expensive, showing that it need not be a barrier because UK production is about delivering fantastic results, using key talent, anywhere in the world.

## **Luke Beauchamp** Dab Hand Media

Addressed another potential concern of Chinese delegates, by showing some of the amazing low budget commercials London has produced recently, and so demonstrating that APA members can realise commercials for low budgets, with ideas tailored to those budgets.

## **Di Redvers, Jordan McGarry and Henry Schofield** Partizan

Showed work from nine London commercials animation companies, to demonstrate the incredible breadth and depth of animation talent available in the UK.

**Carl Grinter** Rushes

**Louisa Cartwright and Jay Lichtman** MPC

**Andy Barmer** The Mill

**Penny Verbe and Belinda Grew** Smoke and Mirrors

**Abby Orchard and Michael Stanish** Framestore CFC

Showed the latest in visual effects from London, clearly showing why London has such an impressive reputation in this area.

**Matt Smith** The Viral Factory

Explained how branded content and advertising on digital platforms was evolving in London, and how London had created some of the most successful examples of advertisers exploiting those new opportunities to connect with consumers.

**Andrew Ruhemann** Passion Pictures

Showed how the ground breaking animated band Gorillaz had been created, and turned into a live act.

A pdf of the programme is at Appendix A (page 18).

Short biographies of all the speakers are at Appendix B (page 22).

# 20 THINGS WE LEARNT

- 1.** China has the same land area as the USA, but with 1314 million people compared to 296 million.
- 2.** There are Seven Chinas – it's not just one market – see page 28.
- 3.** China has a rapidly expanding economy: 9% per annum, on average, for the past 25 years.
- 4.** Advertising expenditure is growing at an even greater rate : From US\$2.7 billion in 2000, to US\$10.5 billion in 2005 and a projected US\$14.2 billion in 2007. For the UK, the figures are US\$19.5 billion in 2000 and US\$23 billion 2007 – so the Chinese market is smaller than the UK's, but growing at a much faster rate.
- 5.** China is catching the US Adex/GDP ratio (i.e. the proportion of GDP spent on advertising) – see page 29.
- 6.** The lion's share of the ad spend in China is on TV; 71% as compared with 43% in the USA, and 27% in the UK.
- 7.** The TV market is growing – WPP estimate by 30% in 2008.
- 8.** The online market is growing even faster – WPP estimate by 48% in 2008.
- 9.** The major international brands are there: China has the highest score of any country: 480 of the world's top 500 brands.

- 10.** No Chinese brand is established as an international brand yet, but it is predicted by Interbrand that there will be a Chinese Sony or Samsung in the future. Research shows the strongest contenders are: Lenovo, Tsingtao, Haier, Bank of China, CCTV, China Mobile, Huawei, TCL, Chery and Aaidu.
- 11.** Budgets tend to be lower than the UK – but there are some very big budget exceptions.
- 12.** Visual advertising is favoured because of the number of different languages and dialects spoken within China.
- 13.** Clients expect the budget to be an all-in cost which accommodates any changes, even if they contradict previous approvals – but the evidence is that London production companies have successfully worked with Chinese agencies which have understood that any new requirements will have a consequence in cost.
- 14.** The agency networks and international clients London companies work with in London are also in Shanghai. The companies and the structure of the business are the same, and that is a great advantage to London production/post/editing companies looking to work there.
- 15.** All the agencies, particularly the smaller agencies that have arrived recently, such as Weiden + Kennedy and BBH, are there to persuade advertisers of the value of creative work. They are effectively doing the selling for us: if / when they persuade clients that they need creative / brand advertising in China, they will then need the best directors, producers, visual effects etc. to deliver those.

- 16.** London production companies are perceived as offering the highest quality production and services but as being too far away and too expensive. As a result, they are not top of mind: it is locals who come first, followed by Taiwan and HK, followed by Australia.
- 17.** The London presentations addressed this perception by showing how London can be flexible, and can find the best solution while taking into account budget. We need to continue to communicate that.
- 18.** Time is tight: the production cycle is typically four weeks.
- 19.** Censorship is an issue: off-line needs to be submitted as early as possible to allow for revisions.
- 20.** Chinese advertising agencies and production companies are very enthusiastic about learning more about UK production and post, and would welcome further events in other Chinese cities.

# CONCLUSIONS

China is becoming a huge advertising market, with a phenomenal growth in ad spend and with a very strong bias toward TV.

There is great potential for UK production to develop significant business with Chinese agencies and production companies.

The delegation demonstrated to the Chinese agencies and production companies that there was a real commitment on the part of London production companies to find ways to work with them. Similarly, Chinese agencies and production companies demonstrated they were equally enthusiastic about working with London production companies.

Building relationships of trust are always important in production, and the SLAF 2007 enabled us to start building those relationships.

# THE FUTURE

## **To build on the potential, we need to:**

- 1.** Build further on the relationships we forged at the SLAF 2007.
- 2.** Continue to address the negative factors in the Chinese agency/production company perception of London.
- 3.** Keep London production at the top of their minds.

## **The actions we will take:**

- 1.** Updates and follow up material to go to SLAF 2007 delegates by email.
- 2.** London delegates to build on the links they forged.
- 3.** Follow up events.

# APPENDIX A – PROGRAMME OF EVENTS

Wednesday 21 November 2007

## Morning

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**0900 REGISTRATION** Tea/Coffee

**0930 Steve Davies Chief Executive, APA**

Introduction: 'What does London have to offer?' is the theme speakers from the UK will develop.

**0945 Dave Waters Creative Director, Freud Communications**

What makes London special? An overview on the top directing talent available from London production companies.

**1015 Tim Katz Managing Director, Knucklehead**

London based but worldwide: London production companies draw talent from around the world and shoot around the world to get the best creative result and best value.

**1045 BREAK** Tea/Coffee

**1100 Kitty Lun Chief Executive Officer, Lowe China**

Insights into advertising in China, Lowe's ethos and work and what they look for in production.

**1130 Carol Potter Chief Executive Officer, BBDO China**

Insights into advertising in China, BBDO's ethos and work and what they look for in production.

**1200 LUNCH** Buffet lunch provided for all delegates and guests.



## Afternoon

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- 1300 Luke Beauchamp Managing Director, Dab Hand Media**  
It's not about big budgets! London is flexible and produces great work from great ideas and sometimes for surprisingly small budgets.
- 1330 Henry Schofield and Di Redvers Producers, Partizan**  
Animation in Commercials: The limitless potential of animation makes it increasingly popular in commercials. We look at the best new animation and how it maximises impact for advertisers.
- 1400 Yang Yeo Chief Creative Officer, JWT, Shanghai**  
Creativity in Chinese Advertising.
- 1430 Norman Tan Executive Creative Director, Bates Asia**  
Insights into advertising in China, Bates Asia ethos and clients and what they look for in production.
- 1500 BREAK Tea/Coffee**
- 1515 Carl Grinter Director of Production, Rushes  
Louisa Cartwright and Jay Lichtman Producers, MPC  
Andy Barmer Managing Director, The Mill London**  
Why has London become a world centre for visual effects?  
Top London post production companies show how stunning effects on commercials were achieved.
- 1600 Kunal Sinha Executive Director - Discovery, Ogilvy Discovery China**  
Everyday Creativity in China.
- 1630 Anthony Tse Managing Director, Cheers Films**  
Production in China and working with overseas production partners.
- 1700 CLOSE**

# APPENDIX A – PROGRAMME OF EVENTS

Thursday 22 November 2007

## Morning

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- 0900 Steve Davies Chief Executive, APA**  
Introduction to Day 2.
- 0915 Scott Spirit China Strategy Director, WPP**  
On the size and potential of the advertising market in China and the opportunities for advertisers, agencies and production companies.
- 0945 Kel Hook Managing Director, Wieden+Kennedy, Shanghai**  
Insights into advertising in China, W+K's ethos and work and what they look for in production.
- 1015 Matt Smith Managing Director, The Viral Factory**  
Branded Content and New Media are advertising's biggest growth area. What are the latest developments in these areas in London.
- 1045 BREAK** Tea/Coffee
- 1100 Andy Chan Senior Creative Director, JWT Shanghai**  
Insights into advertising in China, JWT's ethos and work and what they look for in production.
- 1130 Lyndy Stout Editor, Shots magazine**  
Chairs questions and answers with a panel of delegates.
- 1200 LUNCH** Buffet lunch for delegates and guests.
-

## Afternoon

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- 1300 Jonathan Chajet Asia-Pacific Strategy Director, Interbrand**  
Insights into marketing Chinese and multinational brands in China.
- 1330 Penny Verbe CEO, Smoke&Mirrors  
Abby Orchard and Michael Stanish, Producers, Framestore CFC**  
Why has London become a world centre for visual effects?  
Top London post production companies show how stunning effects on commercials were achieved.
- 1400 Sally Fu Managing Director, 21+**  
Production in China and working with overseas production partners.
- 1430 Beresford Mitchell Executive Creative Director, Red Lounge**  
Insights into marketing and advertising in China from the ECD for all Coca Cola advertising in China.
- 1500 BREAK Tea/Coffee**
- 1530 Ben Zhang Managing Director, Gwansti**  
Production in China and working with overseas production partners.
- 1600 Andrew Ruhemann Managing Director, Passion Pictures**  
How were the virtual band Gorillaz conceived and created and how could these techniques be used in commercials?
- 1645 Q&A with producers from London**
- 1700 CLOSE**

## APPENDIX B – SPEAKER BIOGRAPHIES

### **Steve Davies Chief Executive, APA**

The APA provides its members – commercials production, post, editing and music companies – with advice, services and support and promotes its members expertise worldwide.

### **Norman Tan Executive Creative Director, Bates Asia**

Norman Tan, moved to Shanghai 2.5 years ago as Regional ECD, China at Bates Asia, Norman has been with WPP for about 10 years, spent his 7 years with JWT in Singapore as Regional ECD South East Asia and ECD Taiwan. Clients include Buick, Heineken, Remy Martin, Pizza Hut, Nokia, DTC (DeBeers), MacDonald's etc.

### **Carol Potter CEO, BBDO and Proximity China**

Her clients include Pepsi, GE, Visa, Fedex, Gillette, Chrysler, Johnson and Johnson. Carol is one of the most experienced women in global advertising. She has lived and worked successfully in the UK, Japan, Australia, US and Europe. She is no stranger to China having lived here for nearly 2 years and having spent six years before that marketing a diverse range of products, from diamonds to detergents, to the Chinese consumer.

### **Anthony Tse Managing Director, Cheers Films**

After spending 18 years as a creative in the advertising business, Anthony detoured to join his partner/founder, Karson Ho, setting up Cheers Films in China four years ago. Today Anthony manages Shanghai's operation with China's clients, chiefly 4As agencies, and provides production services for overseas productions.

### **Luke Beauchamp Managing partner/EP, Dab Hand Media Ltd.**

Ten years as Head of Production/EP at radical media London. Have worked with nearly all major brands across many parts of the world. Coca-cola, Nike, Sony-Ericsson.

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**Dave Waters Creative Director, Freud Communications**

Creative Director of Freud Communications, which recently merged with Duckworth Flynn Grubb and Waters (DFGW), which Dave founded with his partners in 1990 and which was a top 30 London agency for 17 years.

**Michael Stanish Senior Commercials Producer, Framestore CFC**

Michael Stanish recently joined Framestore CFC from Tokyo based TYO Productions, having previously spent over six years producing high profile, worldwide commercial shoots for a predominantly Japanese clientèle. Most recent clients include, Nissan, Coca Cola, Toyota, and Nescafe.

**Abby Orchard Senior Commercials Producer, Framestore CFC**

Abby Orchard has been at Framestore CFC for almost 9 years. In 2004 she helped set up the company's hugely successful New York office. Her regular clients include director Noam Murro and Charles Crisp HTV at Red Brick Road.

**Ben Zhang Managing Director, Gwantsi**

The founder of GWANTSI Production and a senior commercial producer. Over his 15 year career he has witnessed the rapid development of the Chinese commercial production industry and has worked on many international productions. Ben has worked with clients including GM, Lenovo, Coke Cola, Panasonic, Citron, etc.

**Jonathan Chajet Director, Asia-Pacific Strategy Director, Interbrand**

Jonathan lives to solve tough global and local branding issues. He has helped enhance and manage some of the world's most recognized brands including Adobe, Lexus, Dell, Intel, Microsoft, Yahoo, Sony Playstation, Nokia, Samsung and Unilever. He is based in Shanghai, PRC.

**Yang Yeo Chief Creative Officer, JWT Shanghai**

Before coming to China, Yang was founding partner/Creative Director of Fallon Singapore and Hong Kong. He also worked in both BBH's Singapore and London offices. He was last with TBWA\China as ECD working on the Adidas Olympics campaign.

**Andy Chan Senior Creative Director, JWT Shanghai**

JWT are the single largest agency in China, by billings and staff.

**Tim Katz Joint Managing Director / Partner, Knucklehead Ltd.**

Tim co-founded Knucklehead in February 2005. With 15 years experience of the commercials production industry, Tim combines roles as an active producer and Joint MD of a busy London-based production company hotshop. Knucklehead's recent client list includes Audi, BMW, Adidas, Sony, Landrover, Marks and Spencer, Lexus and Dunlop.

**Kitty Lun Chairman/CEO, Lowe China**

20+ years in advertising - in Hong Kong, Taiwan and China.

Creative-turned-management.

Champion of solution-based public service advertising.

Author: *Advertising Without Lipstick*

**Jay Lichtman Producer, MPC**

Jay Lichtman works as Senior Producer at MPC. Over his eight year career his credits have included projects with Bjork, Adidas, Nissan, Pepsi and Nike.

**Louisa Cartwright Producer, MPC**

Louisa Cartwright has been a Producer at MPC for the past 2 years. Clients both in the UK & internationally include - JWT, Saatchi & BBH. Recent credits include - Silverjet, Kellogg's & O2.

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**Kunal Sinha Executive Director, Ogilvy & Mather**

Kunal Sinha is Executive Director – Discovery (the consumer insights unit) at Ogilvy & Mather, Greater China; and held the same position in India previously. Ordinary people are his clients, and he and his team strive to bring their opinions and feelings to bear on the communications that Ogilvy creates. He is the author of the forthcoming book, *China's Creative Imperative*, and winner of many awards.

**Di Redvers Director's Rep, Partizan**

Repping at Partizan since June 2007. Before that was repping at Not to Scale for two years. Partizan are one of the top production companies in the world, representing directors such as Antione Bardou-Jacquet, TRAKTOR and Michel Gondry.

**Henry Schofield Producer, Partizan**

Producing for 2 years at Partizan Lab and was head of sales before that. Work regularly with BBH, AMV and Weidens among others. We are currently working on Coke, Ebay and Cadbury's.

**Andrew Ruhemann Executive Producer, Passion Pictures**

Andrew Ruhemann is the founder and executive producer of Passion Pictures, widely acknowledged as one of the world's leading animation studios, based in London and Paris. Recent credits include the Gorillaz videos, Vodafone "Mayfly" and Sony Bravia "Play-Doh".

**Carl Grinter Director of Production and Business Development, Rushes**

Joining Rushes in 2003 with 20 years film and post production experience, Carl oversees our broad range of work, maintaining Rushes as a world leader in telecine, visual effects and computer animation. Clients include Coca Cola and Toshiba.

**Penny Verbe CEO, Smoke & Mirrors**

CEO and co-founder of Smoke & Mirrors which was established in 1995 as the original post production boutique. Since then Smoke & Mirrors has expanded considerably to become a full service post company with offices in NY, and in-house facilities at a number of prestigious agencies.

**Lyndy Stout Editor, Shots**

Shots is the leading commercials industry magazine and its bi-monthly dvd enables the advertising industry to see the best new commercials from around the world.

**Andy Barmer Managing Director, The Mill**

Andy Barmer is Managing Director of world-leading visual effects company, The Mill. From its facilities in London, New York and Los Angeles, The Mill provides award-winning creative solutions to the global advertising community.

**Matt Smith Managing Director, The Viral Factory**

Matt co-founded TVF in 2001. Since then he has been involved in genre defining campaigns for clients such as Ford, Microsoft, Samsung, Axe and Shell.

**Sally Fu Managing Director, 21+,  
one of Shanghai's leading production companies.**

**Kel Hook Managing Director, Wieden + Kennedy Shanghai**

W+K are an agency renowned for their creative work, first gaining prominence for their work for Nike.



**Scott Spirit China Strategy Director, WPP**

Scott is responsible for identifying a strategy for WPP and its agencies – Ogilvy, JWT, Grey, Bates and Y&R, in a market that it has identified as key to the continued growth of its business.

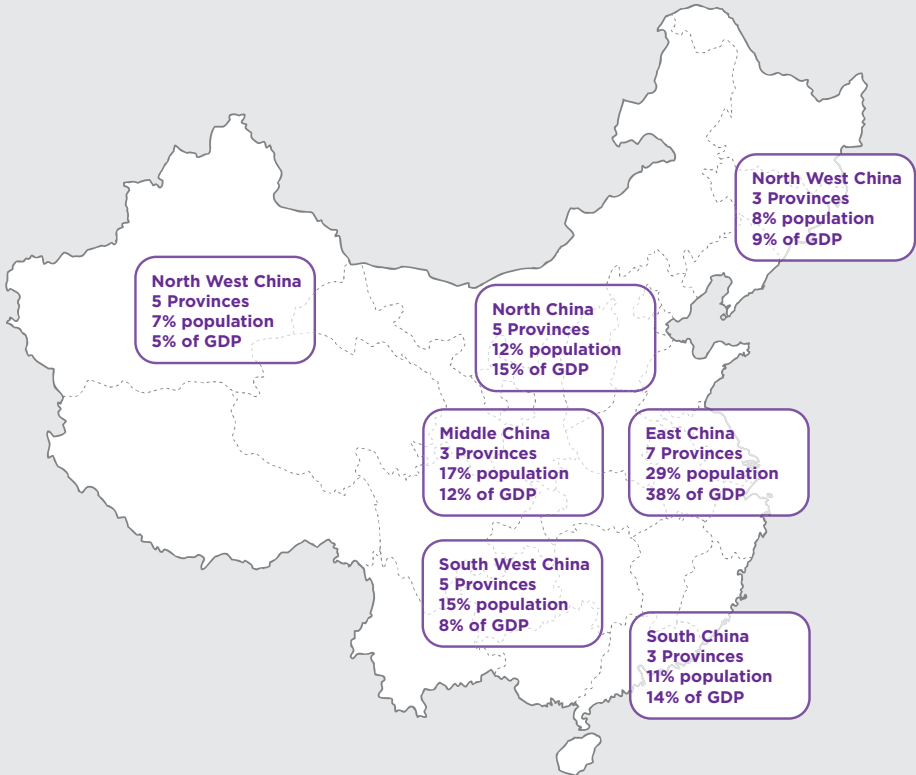
**Johnny Tan Creative Director, BBH Shanghai**

BBH, an agency renowned for their creative excellence, opened its Shanghai office in 2005. Previously, Johnny was an award winning creative at BBDO New York.

**Chien Hwang ECD, TBWA\China**

Formerly of BBDO NY (Pepsi, HBO, GE) and Y&R NY (Diet Dr Pepper, Toys R Us, Texaco). Awarded in North America, UK and France.

# APPENDIX C – THE SEVEN CHINAS



Courtesy of Scott Spirit / WPP

# APPENDIX D – THE ADEX/GDP RATIO



Courtesy of Scott Spirit / WPP

Source: From GroupM TNYN July 06 & China Statistic Year Book

## APPENDIX E - CONTACT DETAILS

### APA

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## SHANGHAI LONDON ADVERTISING FORUM 2007

Wednesday 21 and Thursday 22 November 2007

Creek Art  
Behind 423 Guangfu Road,  
near Qu Fu Xi Road,  
Shanghai

This event was organised by:  
**Advertising Producers Association**  
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APA

Advertising Producers Association