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New Insights for Marketers Targeting Boomers and Beyond



FOCALYST EXECUTIVE FORUM

October 2-3, 2008
 Pier Sixty • New York

- The latest strategies for succeeding with the Boomer consumer in the U.S. and globally
- New research on Boomer media consumption, spending habits and advertising effectiveness
- Emerging cross-generational trends to drive growth and innovation



Matthew J. Doyle
 Director and Senior
 Researcher, Research &
 Development, Health Care
 Products – Worldwide
 The Procter & Gamble
 Company



John Maeda
 President
 Rhode Island School
 of Design (RISD)



Chris Murphy
 Chief Strategy Officer
 Focalyst & Millward
 Brown



Maureen Shirreff
 Creative Director
 Dove, North America,
 Ogilvy



Bart Turner
 VP of Marketing
 Strategy, Advertising
 and Media
 Ameriprise



J Walker Smith
 President
 Yankelovich



Donna Sturgess
 Head of Global Innovation
 GlaxoSmithKline



Andrew Zolli
 Renowned Futurist

Learn from case studies that demonstrate
 success with this market

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FOCALYST EXECUTIVE FORUM

*New Insights for Marketers
Targeting Boomers and Beyond*

Join over 60 Leading Marketers and Experts and Gain New Insights into Where the Boomer Market is Headed

Despite knowing the size, spending power and influence of the Boomer generation, marketers and advertisers have yet to fully realize the major business opportunity this multi-faceted market represents.

Now is the time to drive business innovation. Join us at the **2008 FOCALYST EXECUTIVE FORUM** and tap into the latest trends, research and strategies for succeeding with the Boomer consumer both in the U.S and globally.

The 2008 program was co-created by Focalyst industry experts and over 200 marketers, researchers and thought leaders. Our theme, ***The Changing Boomer Equation***, will examine the Boomer market from a variety of angles but more importantly, will bring to life cross-generational consumer trends impacting the future of your business.

Our 2008 speaker line-up includes the biggest names in business today. Their collective expertise, spanning a wide range of industries and content areas, will provide a framework for succeeding with this market, by revealing what's working and what's not.

Register today and join the conversation fueling one of the biggest consumer opportunities of the 21st century. You'll walk away with actionable insights, new industry connections and a clearer picture of how to succeed in tomorrow's consumer landscape.

We look forward to seeing you there!



Heather Stern
Director Marketing and Client Development



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Discount
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And save \$250**

What You'll Learn

- **Best practices in marketing to Boomers** – language, imagery, tone, communication style and media
- **Emerging trends to drive new product development**
- **How to reframe your company's value proposition to appeal to Boomers in challenging economic times**
- **New research on Boomers engagement with new media and technologies**
- **How sustainability and legacy influence Boomer decision making**
- **Case Studies of marketers connecting with Boomer segments: grandparents, caregivers, pre and post retirees**

Who Should Attend

- **CMOs**
- **Senior Marketing Executives**
- **Brand/Product Managers**
- **Market Researchers**
- **Innovators**
- **Futurists**
- **Designers**
- **Agency Executives**

Industry Representation

- **Financial Services**
- **Healthcare**
- **Technology**
- **Consumer Packaged Goods**
- **Food and Beverage**
- **Media**
- **Travel and Leisure**
- **Housing**

Speakers

Network & learn from the largest gathering of thought leaders and Boomer marketers

Melissa Abbott
Senior Trendspotter and Analyst
The Hartman Group

Dr. Alexis Abramson
Vice President of Research, "Lifestyle Gerontologist"
Retirement Living TV

Gretchen Addi
Location Lead
IDEO

Jess Aguirre
Senior Vice President, Research
Hallmark Channel and Hallmark Movie Channel

Majd Alwan
Director
Center for Aging Services Technologies

Corinne Asturias
Boomers Consumer Strategist
Iconoculture

Susan Ayers Walker
Journalist and Director
SmartSILVERS Alliance

Bill Bass
Co-Founder and CEO
Fair Indigo

Andrew Bienkowski
Vice-President of Global Brands
Kimberly-Clark

Lori Bitter
President
JWT Boom

Jonathan Boehman
Creative Director & Partner
Immersion Active

Jim Bremer
Vice President, Futures Team
Hasbro Games

Geoff Brooks
National Director of Premier & Retirement Strategy, Senior Vice President
HSBC Bank USA

Linda Caliri
Vice President, Marketing
AARP Financial

Chiqui Cartagena
Managing Director, Integrated Marketing
Meredith Hispanic Ventures

Terry Clarke
Chief Marketing Officer – Enterprise Services for Ovations
UnitedHealth Group

Kit Cody
General Manager Web Strategy
AARP Services Inc.

Arthur Cresce
Housing and Household Economic and Statistics Division
US Census Bureau

Kierstin DeWest
CEO, Co-Founder
Ci

Mark Dolliver
Editor at Large
AdWeek

Matthew J. Doyle
Director and Senior Researcher, Research & Development, Health Care Products – Worldwide
The Procter & Gamble Company

Peter Drake
Vice President, Retirement & Economic Research
Fidelity Investments Canada

Richard Dugas
CEO
Pulte Homes, Inc.

John Forsyth
Partner
McKinsey & Company

Nan-Kirsten Forte
Executive Vice President, Consumer Services
WebMD

Michele Garvey
Director, Senior Strategy
Walgreens

Jeffrey Glueck
Chief Marketing Officer
Travelocity

Kelly Greene
Staff Reporter
The Wall Street Journal

Arlene Harris
Founder and Chairman of the Board of Directors, Chief Strategy Officer
GreatCall

Jac Herschler
Senior Vice President, Marketing
Prudential Annuities

Dr. Michael J. Hewitt
Exercise Physiologist
Canyon Ranch

Nigel Hollis
Chief Global Analyst
Millward Brown

Marc Hottenroth
Industrial Design Leader
GE Appliances

Larry W. Jones
President
TV Land

Rene Huey Lipton
Vice President and Director of Marketplace Planning
GSD&M's Idea City

Susan Lee
EVP Marketing
Nederlander Organization

Julia Lennox
Vice President, Marketing
MetLife Retirement Strategies

Jack Lett
Executive Vice President
Focalyst

Nancy Lewin
Director, The Caregiver Initiative
Johnson & Johnson Consumer Products Company

John Maeda
President
Rhode Island School of Design (RISD)

Ladan Manteghi
President
AARP Global Network

Nadine McHugh
Managing Partner, Managing Director – U.S. Accounts
MindShare

Chris Murphy
Chief Strategy Officer
Focalyst & Millward Brown

Christian Oestlien
Senior Product Manager
Google

Mary Ann Packo
CEO
Millward Brown North America

Mark Pope
Director, The Journal Report & Special Projects
The Wall Street Journal

Donald Reilley
National Sales Manager, Entertainment and Devices, Games Advertising
Microsoft

Jeff Renaud
Director, Ecomagination
GE

Rosemary Riley
Section Manager
Abbott Nutrition

Stephen Roof
President
Beacon Hill Village

Jeff Rothman
Marketing Director
The Dannon Company

Jerry Shereshevsky
CEO
Grandparents.com

Maureen Shirreff
Creative Director for Dove, North America
Ogilvy

J Walker Smith
President
Yankelovich

Claire Spofford
Senior Vice President of Marketing and Retail
Appleseeds

Reuben Steiger
CEO and Founder
Millions of Us

Donna Sturgess
Head of Global Innovation
GlaxoSmithKline

Sandy Timmerman
Assistant Vice President and Director, Mature Market Institute
MetLife

Bill Topf
Vice President, Scotch and Irish Whiskey Marketing
Diageo

Justin Townsend
CEO and Co-Founder
IGA Worldwide

Bart Turner
VP of Marketing Strategy, Advertising and Media
Ameriprise

Lisbeth Valther Pallesen
Executive Vice President
LEGO, Inc.

Craig Vogel
Professor, College of Design, Architecture, Art, and Planning (DAAP)
University of Cincinnati

Timothy Wirth
President
United Nations Foundation and Better World Fund

Andrew Zolli
Renowned Futurist

Agenda at a Glance

DAY ONE THURSDAY, OCTOBER 2, 2008

7:30 Registration and Morning Coffee

8:30 **Welcome Remarks**
Mary Ann Packo, CEO, Millward Brown North America

8:45 **The Road Ahead: Environmental, Technological and Social Forces Shaping the Boomer Brandscape**
Andrew Zolli, Renowned Futurist

At the inaugural Focalyst Forum, Andrew demonstrated how we live in a time of accelerated change fueled by major demographic shifts and new cultural values. While the long-term demographic trends haven't changed, major environmental, technological and social trends are continuing to alter Boomer realities.

- Embracing Ecovation
- The Participation Revolution
- Citizenship Branding
- Healthscape 2030

9:45 **Creating Products and Services that Delight 50+ Consumers: The Latest Insights from The Live Well Collaborative**
Matthew J. Doyle, Ph.D., Director and Senior Researcher, Research & Development, Health Care Products - Worldwide, The Procter & Gamble Company

Craig Vogel, Professor, College of Design, Architecture, Art, and Planning (DAAP), University of Cincinnati

As Gil Cloyd, CTO of Procter & Gamble said, "For P&G to reach its growth objectives, we must achieve breakthrough results in meeting the needs of the aging consumer". In this exciting keynote presentation you'll hear the latest insights from The Live Well Collaborative, an international consortium dedicated to breakthrough innovation focused on products and services for the world's 50+ consumers.

- The Collaborative as a unique model for rapidly translating consumer-driven insights into products and services
- Open innovation for 50+ consumer: men vs. women
- Trans-generation market opportunities

10:30 Refreshment Break sponsored by Retirement Living TV

11:00 **Welcome back remarks from our Premier Sponsor**

11:05 **NEW RESEARCH! Navigating the Changing Boomer Equation in These Highly Charged Times**
Chris Murphy, Chief Strategy Officer, Focalyst & Millward Brown

The results of this new study will get at the heart of how the issues of our day are impacting the inner Boomer psyche and the ever-changing equation of wants, needs, fears, aspirations and outlooks:

- How will the changing economy impact Boomer spending and their decisions on retirement?
- Where are they cutting back? Where are they spending more?
- How can companies re-frame their value to appeal to Boomers in these highly charged and challenging economic times

11:45 **Change the Rules, Change the Future: What Boomers Will Leave Behind**

Opening Keynote Remarks by *Timothy E. Wirth, President, United Nations Foundation and Better World Fund*

Panelists: *Bill Bass, Co-founder and CEO, Fair Indigo; Jeff Renaud, Director, Ecomagination, GE*

In this exciting keynote presentation, we'll focus on what legacy means to Boomers and discuss how their collective consciousness is becoming a catalyst for positive change in businesses who are increasingly finding new ways to the "sweet spot" – developing products, services and even new business models that increase profits and make the world a better, cleaner place.

12:45 Luncheon sponsored by Immersion Active

TRACK A:
Global Perspectives: A Sign of What's to Come

TRACK B:
Stage Not Age: Connecting with Today's Hottest Boomer Segments

1:30 **Embracing the Global Aging Opportunity**
Ladan Manteghi, President, AARP Global Network
Jack Lett, Vice President, Focalyst

Beyond Demographics: Creating An Emotional Brand Strategy among Boomers
Donna Sturgess, Head of Global Innovation, GlaxoSmithKline

New Insights for Marketers Targeting Boomers and Beyond

	TRACK A cont:	TRACK B cont:
2:00	Around the World in 50+ Years: How the Global Consumer Market is Turning Silver, and How to Shine Brightly Within it <i>Corinne Asturias</i> , Boomers Consumer Strategist, Iconoculture	U-Boomers: The Financially Unprepared yet Undaunted and Uncompromising Boomer Cohort <i>John Forsyth</i> , Partner, McKinsey & Company
2:30	Case Study: Global Brand Building <i>Andrew Bienkowski</i> , Vice President of Global Brands, Kimberly-Clark	Connecting with Family Caregivers: A Roundtable Discussion Moderator: <i>Sandra Timmermann</i> , Assistant Vice President and Director, Mature Market Institute, MetLife Panelists: <i>Terry Clark</i> , Chief Marketing Officer – Enterprise Services for Ovations , a UnitedHealth Group Company <i>Nancy Lewin</i> , Director, The Caregiver Initiative Johnson & Johnson Consumer Products Company <i>Alexis Abramson</i> , Vice President of Research “Lifestyle Gerontologist,” Retirement Living TV
3:15	Refreshment Break sponsored by Retirement Living TV	
3:45	Boomer Perspectives from Around the World Moderator: <i>Nigel Hollis</i> , Chief Global Analyst, Millward Brown , Author, <i>The Global Brand</i> (to be published September 30) Panelists: <i>Lisbeth Valther Pallesen</i> , Executive Vice President, LEGO Inc. <i>Jeff Rothman</i> , Marketing Director, Dannon <i>Peter Drake</i> , VP Retirement and Economic Research, Fidelity Investments, Canada	The Grandparent Life Stage: A Multibillion-Dollar Marketplace Moderator: <i>Jerry Shereshevsky</i> , CEO, Grandparents.com Panelists: <i>Susan Lee</i> , EVP Marketing, Niederlander Organization <i>Jeffrey Glueck</i> , Chief Marketing Officer, Travelocity <i>Jim Bremer</i> , Vice President, Futures Team, Hasbro Games <i>Jess Aguirre</i> , Sr. Vice President, Research, Hallmark Channel and Hallmark Movie Channel
4:45	The Future of Retirement Across the Globe: The New Old Age <i>Geoff Brooks</i> , National Director of Premier & Retirement Strategy, Senior Vice President, HSBC Bank, USA	Winning with 55+ Women at Retail <i>Claire Spofford</i> , Senior Vice President of Marketing & Retail, Appleseeds
5:30 - 6:30	Cocktail Reception sponsored by Grandparents.com	

DAY TWO FRIDAY, OCTOBER 3, 2008

7:30	Morning Coffee
8:30	Navigating the Generations: Differences (and Similarities) between Boomers and Other Cohorts <i>J Walker Smith</i> , President, Yankelovich , Author, <i>Generation Ageless: How Baby Boomers Are Changing the Way We Live</i> J. Walker Smith, generational guru and one of America’s leading analysts on consumer trends will provide an eye-opening look at the “ageless generation” and offer a roadmap for navigating the differences (and similarities) among and between Boomers and other consumer cohorts.
9:15	Boomer Advertising and Media: Debates, Discussion and the Latest Thinking on What's Working and What's Not Moderator: <i>Mark Dolliver</i> , Editor at Large, AdWeek Panelists: <i>Maureen Shirreff</i> , Creative Director for Dove, North America, Ogilvy ; <i>Bart Turner</i> , VP of Marketing Strategy, Advertising and Media, Ameriprise ; <i>Bill Topf</i> , Vice President Scotch and Irish Whiskey Marketing, Diageo North America ; <i>Nadine McHugh</i> , Managing Partner, Managing Director – US Accounts, Mindshare , <i>Mark Pope</i> , Director, The Journal Report & Special Projects, The Wall Street Journal ; <i>Larry W. Jones</i> , President, TV Land When it comes to marketing to Boomers, there is no Golden rule – how best to connect, motivate and engage such a diverse and dynamic generation is still hotly debated. Hear from our panelists – each of whom are pioneering a new age in marketing: <ul style="list-style-type: none"> • Do Boomers want to be singled out in advertising or be approached with a mass-market strategy? • What language, images and communication styles are most motivating? • Which media is most effective in reaching them? • Despite shifting demographics, will Madison Avenue always be obsessed with youth?

● For full session descriptions visit www.focalystforum.com

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Agenda cont:

10:15 **A Market of Millions Worth Trillions. Ad Effectiveness for 50+ by AARP Media Sales**

10:30 **On Simplicity: Rethinking our Approach to Product, Service and Communication Design**

John Maeda, President, **Rhode Island School of Design (RISD)**, Former Associate Director of Research, MIT Media Lab
Author, *The Laws of Simplicity*

We're honored to have a special keynote presentation from *John Maeda*, world-renowned graphic designer, visual artist, computer scientist and evangelist for 'humanist technologists'. Named by Esquire magazine as one of the 21 most important people for the twenty-first century, Maeda first made his mark by redefining the use of electronic media as a tool for expression for people of all ages and skills. In his 10 rules and 3 keys for simplicity, he'll inspire you to rethink our approaches to living, working and connecting with each other.

11:15 **Refreshment Break sponsored by JWT Boom**

11:45 **Live Where your Customer is: Boomers in a Networked World**

Moderator: *Rene Huey-Lipton*, Vice President and Director of Marketplace Planning, **GSD&M's Idea City**

Panelists: *Christian Oestlien*, Senior Product Manager, **Google**; *Donald Reilley*, National Sales Manager, Entertainment and Devices, Games Advertising, **Microsoft**; *Reuben Steiger*, CEO and Founder, **Millions of Us**; *Justin Townsend*, CEO and Co-Founder, **IGA**

From Multiply to My Space, Everquest to Halo3 and all through Second Life...it's a whole new and ageless world on the internet and the 50+ are there in full force. This world class panel will discuss the idea of community building, gaming, avatars and more and why it is so enticing to the Boomer group—what are they looking for and what are they finding (or not)? You'll leave understanding what you can do to be an effective part of the community and why taking the time to create the ultimate ongoing experience is so much better than an ad campaign.

12:45 **Luncheon**

	TRACK A: Engagement	TRACK B: Health & Wellness	TRACK C: Community & Lifestyle
1:30 S L E N A P	<p>Motivating Boomers: Lessons Learned from the Financial Services Field Moderator: <i>Lori Bitter</i>, President, JWT Boom Panelists: <i>Jac Herschler</i>, Senior Vice President, Marketing, Prudential Annuities <i>Julia Lennox</i>, Vice President, Marketing, MetLife Retirement Strategies <i>Linda Caliri</i>, Vice President, Marketing, AARP Financial</p>	<p>"Healthcare Unbound": How Boomers are Demanding (and influencing) a New Healthcare Landscape Moderator: <i>Susan Ayers Walker</i>, Journalist and Director, SmartSilvers Alliance Panelists: <i>Michele Garvey</i>, Director, Senior Strategy, Walgreens <i>Dr. Majd Alwan</i>, Director, Center for Aging Services Technologies <i>Michael J. Hewitt</i>, Ph.D., Exercise Physiologist, Canyon Ranch <i>Rosemary E. Riley</i> PhD, LD, Section Manager, Abbott Nutrition <i>Nan-Kirsten Forte</i>, Executive Vice President, Consumer Services, WebMD</p>	<p>"Variety is The Spice of Life": Envisioning The Next Generation of Boomer Housing and Community Living Moderator: <i>Kelly Greene</i>, Staff Reporter, The Wall Street Journal Panelists: <i>Richard Dugas</i>, CEO, Pulte Homes, Inc. <i>Stephen Roop</i>, President, Beacon Hill Village <i>Gretchen Addi</i>, Location Lead, IDEO <i>Arthur Cresce</i>, Housing and Household Economics and Statistics, Census Bureau <i>Marc Hottenroth</i>, Industrial Design Leader, GE Appliances</p>

2:30 **Refreshment Break sponsored by JWT Boom**

2:45	<p>Online Campaign Optimization: Influencing Boomers through Meaningful Online Engagement <i>David Weigelt</i>, Marketing Strategist & Partner, Immersion Active <i>Jonathan Boehman</i>, Creative Director & Partner, Immersion Active</p>	<p>Changing Food & Beverage Consumption Among Boomers: Reimagining the Future <i>Melissa Abbott</i>, Senior Trendspotter and Analyst, The Hartman Group</p>	<p>How to Target Hispanic Boomers <i>Chiqui Cartagena</i>, Managing Director, Integrated Marketing, Meredith Hispanic Ventures, Author, <i>Latino Boom! What Every Business Needs to Know about the US Hispanic Market</i></p>
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3:15 **Refreshment Break sponsored by JWT Boom**

3:30	<p>Designing, Launching and Evolving Jitterbug <i>Arlene Harris</i>, Founder and Chairman of the Board of Directors, Chief Strategy Officer, Jitterbug/Great Call Inc.</p>	<p>The SHIFT Report: Strategic Insight on Boomers & Sustainability <i>Kierstin DeWest</i>, CEO, Co-Founder Ci</p>	<p>Web 2.0 and the 50+ Demographic: The Latest from AARP.org <i>Kit Cody</i>, General Manager Web Strategy, AARP Services, Inc.</p>
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4:00 **Now What? Brainstorming and Networking Roundtables**

Stick around for roundtable-brainstorming sessions moderated by Focalyst staff. Don't miss this chance to connect with fellow attendees – from a range of industries -- who may be facing the same challenges as you. Debate, discuss and hone in on key take aways from the conference that you can bring back to your organization.

5:00 **Conclusion of Conference**



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Registrations may be cancelled without penalty up to 10 business days before the start of the conference. Cancellations made after that date are subject to a \$350 cancellation fee. Substitutions may be made at any time prior to the start of the conference. Non-attendance will incur the full conference fee.

Venue

Situated at Chelsea Piers, Pier Sixty offers attendees breathtaking views of the Hudson River. This distinctive venue recalls the grand ballroom of ocean liners – with soaring space, fine architectural design and floor to ceiling windows. State of the art meeting facilities complement award winning Abigail Kirsch cuisine.



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Hotel Information

Special room rates have been negotiated for Forum attendees. To take advantage of the discounted rate, call one of the hotels below by September 10, 2008 and mention that you are attending the **Focalyst Executive Forum**. After September 10, 2008 rates are at the discretion of the individual hotels.

Soho Grand Hotel

310 West Broadway
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Phone 212.965.3000

Group rate: \$429 per night

The Hotel Roger Williams

131 Madison Avenue
New York, NY 10016
Phone 212.448.7000

Group rate: \$329 per night



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