

# inter national ist

## INTEGRATION: BUZZWORD OR REALITY ?

inside issue 2006.1

Tim Ellis  
Believes  
His Job At  
Volvo Is  
To Provoke

M&C Saatchi's  
Kim Walker  
Examines  
Where Lines  
Are Drawn

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FOR ADVERTISING, MARKETING + MEDIA PROFESSIONALS

early spring

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cover photo: digitalvision / veer.com

2006.1

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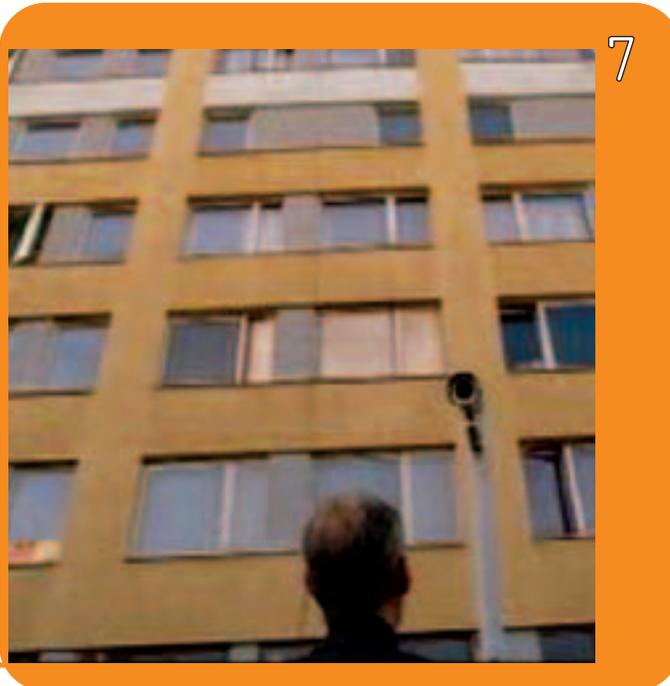
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STAFF

deborah malone PUBLISHER 1.917.816.6416 deborah.malone@dm-ny-global.com  
nancy s. giges EDITOR 1.914.683.5108 nancy.giges@inter-national-ist.com  
april garston CREATIVE DIRECTOR april.garston@inter-national-ist.com  
kathleen barnes, louis haugh, david kilburn CONTRIBUTING WRITERS  
christine yun MARKETING, CIRCULATION, RESEARCH christine.yun@inter-national-ist.com  
michael rhodes WEBMASTER rhodie27@gmail.com  
corporate office 1.212.371.7026



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COMING

in 2006

Branding: New Avenues

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Changing Perspectives on Global, Multinational & Local

New Criteria for Accountability

Internationalists of the Year:  
The Marketers Behind the Brands

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## What do



have in common?

## Mezzomedia

From our headquarters in Hong Kong Mezzomedia represents a blue chip portfolio of the world's premier TV, Print and Internet media throughout the Asia-Pacific.

For further information please contact us or visit our website:

Matthew Farrar  
Managing Director  
Mezzomedia Limited

604 Kinwick Centre  
32 Hollywood Road  
Central Hong Kong

Tel + 852 2581 2991  
Fax + 852 2581 2239

E-mail [info@mezzogroup.com](mailto:info@mezzogroup.com)  
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International Media Specialists

## AN OPTIMISTIC SPRING

Spring and optimism have long been linked in the minds of poets; in this spring of '06, they're also linked in the minds of economists, advertisers, and the media.

All ad growth forecasts are quite positive.

TNS Media Intelligence projects a 5.0% gain for the U.S. in the first half of this year, and 5.7% growth in the second half (a full two percentage points higher than a year earlier). There's little surprise that the internet and search channels are leading in the greatest percent of media segment expansion.

Zenithoptimedia is anticipating worldwide ad growth of better than 6% this year, and the figures further indicate how the BRIC markets keep charging ahead, as do a number of the former Soviet satellite states, the Arab world, and Indonesia.

Even Japan and Germany are anticipating real economic growth after long years of stagnation.

Numbers are significant indicators, but there are also other signs underscoring a strong year for international advertising. The IAA World Congress in the Mideast this March is attracting more than 1,000 people to Dubai to hear leading viewpoints from all over the world. This fast-growth city also symbolizes how the centers between Europe and Asia are shifting and do not want to be left out of new opportunities.

Most significantly, though, we're finally seeing some exuberance in terms of new pan-regional media launches. Haymarket London has announced *World Business* as a new magazine for the aspiring executive who recognizes how the business landscape has shifted. Plus, CNBC Europe is reinventing *European Business* as a print companion to the network's business and financial programming in order to create integrated solutions of its own. Let's hope that this first decade of the 21st century continues to fuel buoyant growth for all of us.

## NEW THINKING ABOUT INTEGRATION

Integration in our business has been talked about for decades. And year after year, the talk focused on integration as "the emerging trend." Marketers have said they want "integrated" communications programs; agencies say they offer integrated services; media companies say they offer integrated solutions.

But the question is whether there has been more than lip service? Has there been movement toward integrated programs and services? We asked advertising, marketing, and media folks from all three segments of the business where they think things stand. You can read their thinking in our Cover Story: "Integration: Buzzword or Reality?" that starts on page 14.

In our "Commentary" feature, Kim Walker of M&C Saatchi touches on a related issue: the organization of agency and media service companies. He writes that "the marketing communications business has segmented itself into 'lines'—above-the-line, below-the-line, and the lines between media agencies and creative agencies. Even more lines are being drawn now." And he asserts that agencies must "transform their old ways" because the landscape has shifted, and the idea has to be the key, not the method of delivery nor the source of the idea. Granted, these are not new topics of discussion, but each new piece adds to the knowledge and can help the industry move forward.

In other sections of this issue, we have summarized some of the most current research and show some recent creative work that is appearing globally or regionally. Writer Kathleen Barnes asked Volvo's Tim Ellis to talk about the automaker's most recent attention-getting campaigns. Melanie Varley of Mediaedge:cia shares the contents of her travel bag with us, and Hub Culture offers travel tips on Beirut.

Happy reading.



**deborah malone**  
PUBLISHER



**nancy s. giges**  
EDITOR

## wrangler connects with 'walk the line'

"Walk the Line," the movie about the early years of legendary musician Johnny Cash, was a match made in heaven for Wrangler Europe. "We feel connected to Johnny Cash because he took every opportunity to reach his goal and resisted every setback he found in his way. He fought for what he wanted, and that connects to the spirit of our brand and the 'Wanted' campaign [that Wrangler introduced two years ago]," says Scott Otte, Wrangler Europe marketing director. The jeans marketer ran cinema and TV commercials across Europe as the film opened and conducted a variety of promotions and events. The commercial by BSUR Concepting, Amsterdam, shows people who encounter tough circumstances while they walk the line to get what they desire. "The commercial is the 'Wanted' way of telling Cash's story. Rough natural elements represent the continuous misfortune, while people walk the horizon line," Otte adds. Media agency is Mediaedge:cia. ●



### AOL ASKS CONSUMERS TO WEIGH IN

AOL U.K. is taking a new tack with its advertising with a campaign designed to encourage debate and discussion about internet issues. The ads encourage consumers to express their opinions at [www.aol.co.uk/discuss](http://www.aol.co.uk/discuss).

Created by Grey London, the concept came about through significant amounts of customer research and the belief that it's important that both good and bad aspects of the medium that is changing everyone's lives should be addressed.

The first TV spots ask about the good and bad. Other executions deal with other aspects of internet usage, such as parental control. On the first day of the campaign, 60,000 unique visitors accessed the site. Posters, print, and online are also part of the campaign. Media agency is Vizeum. ●

the  
internet:  
good  
or  
bad



ALL PRICES ARE IN  
LOCAL CURRENCY  
UNLESS OTHERWISE STATED

MARCH 21–23

DUBAI 2006:  
CHALLENGES OF CHANGE  
40TH IAA WORLD ADVERTISING  
CONGRESS

PLACE: *The Dubai International  
Convention Centre*

RESERVATIONS:

[www.iaadubai2006.com](http://www.iaadubai2006.com);  
[info@iaauae.org](mailto:info@iaauae.org)

PRICE: Member US\$1,200;  
non-member US\$1,400

MARCH 24

THE ADVERTISING CEOS'  
ASIA PACIFIC SUMMIT 2006  
INSTITUTE OF ADVERTISING  
SINGAPORE

PLACE: *Shangri-la Hotel*

RESERVATIONS: [www.ias.org.sg](http://www.ias.org.sg);

65-6220-8382

PRICE: US\$450

MARCH 28

MONITORING MEDIA  
CAMPAIGN PERFORMANCE  
WORLD ADVERTISING  
RESEARCH CENTER

PLACE: *Millennium*

*Knightsbridge Hotel, London*

RESERVATIONS:

*Sarah Miller 44-(0)1491-418600*;

[www.warc.com](http://www.warc.com)

PRICE: US\$945 plus VAT

APRIL 27

ASIAN ADVERTISING AWARDS  
2006

MEDIA MAGAZINE

PLACE: *The Ritz-Carlton, Bali  
Resort & Spa*

RESERVATIONS:

[www.mediaspikes.com](http://www.mediaspikes.com);

852-3175 1913

PRICE: NA

## regulations

### STATUS QUO IN JAPAN

When the advertising industry learned just over a year ago that Japan's Fair Trade Commission had embarked on a major investigation of business practices in the advertising industry, there was hope that this would lead to major reforms. Smaller agencies, international agencies, and many advertisers had often criticized privately the power exerted by Dentsu and Hakuhodo DY Partners, the two largest agency groups that hold a combined market share over 42% and buy 56% of all TV time.

The lack of transparency of invoicing procedures and the unlevel playing field were among many problems. According to one executive familiar with the enquiry, the FTC planned to explore whether large agencies and advertisers used their massive buying power to disadvantage smaller companies via secretive pricing or discount arrangements. The study grew out of an earlier investigation into the relations between agencies and their sub-contractors where the FTC found that failure by large agencies to provide proper contractual agreements for work they commissioned led to abuses.

It took almost a year for the FTC to deliver its verdict. While the findings painted an unflattering portrait of the advertising industry's anti-competitive business practices, they failed to find actual breaches of the law. And while the commission recommended changes in how the Japanese ad agencies do business, it stopped short of any legal measures to force change and said it currently had no further plans for additional investigation. Consequently, the concerns remain unaddressed.

Speaking almost to the same script, both Dentsu and Hakuhodo flatly refused to answer questions about the implications of the report.

While Western agencies and advertisers now generally follow fee-based compensation systems, Japanese agencies still bill clients gross amounts for media and creative services. One consequence is that, according to the Japanese Advertisers Association, many advertisers don't even know what commission they are paying agencies because invoices from Japanese agencies usually don't provide supporting details.

"It is hard to image that the FTC report is going to alter in any way how advertising is traded in Japan," commented Michael Johns, formerly CEO of SPI, a Tokyo marketing communications consultancy within the Aegis Group, and now SPI regional director based in Singapore. "It looks like the status quo is going to prevail for some time to come. So advertisers will just have to work within the system the best they can as they have been doing," added Johns. ●

—David Kilburn

Submit your events to  
[editorial@inter-national-ist.com](mailto:editorial@inter-national-ist.com)

## 'business as usual'

THREE DAYS AFTER THE BEIRUT OFFICES OF ASDAA, MEDIAEDGE:CIA, AND YOUNG & RUBICAM WERE DESTROYED DURING RIOTS IN FEBRUARY, THEY WERE UP AND RUNNING THE NEXT DAY. (SINCE THE RIOTS WERE ON A SUNDAY, NO ONE WAS WORKING AND HURT.) THREE DAYS LATER, THE AGENCIES LET CLIENTS AND FRIENDS KNOW IT WAS "BUSINESS AS USUAL" WITH THIS AD THAT RAN IN LOCAL NEWSPAPERS. ●

## new for the bookshelf

CONNECTED MARKETING  
THE VIRAL, BUZZ AND WORD OF MOUTH REVOLUTION

A collection of opinion pieces by academics, consultants, and practitioners, edited by marketing consultants Justin Kirby and Paul Marsden.

(BUTTERWORTH-HEINEMANN) ●



## india's air deccan bringing air travel to many

In what is believed to be India's longest TV spot at 150-seconds, the country's first budget airline, Air Deccan, reflects the hopes and aspirations of the poor. In the spot by Orchard Advertising (Leo Burnett India), a postman delivers a letter to an old man containing an air ticket from his son. As he pedals off, the old man reminisces about a time he carved a wooden plane for his son and how the excited child ran all over the village with his new toy. Back in the present, villagers gather to see off the old man, clutching a borrowed bag to his chest. At the airport, palpably nervous, he refuses to let go of the bag but finally releases it for the X-ray machine and watches closely as the screener checks the screen. The screener stares and then smiles on seeing a toy plane inside the bag. Voiceover says: "For millions of Indians, flying is no longer a dream."

The spot, including the time it is telecast, is being publicized much like a film on outdoor boards, posters at airports, trailers on mobile phones and the Internet as well as in leaflets distributed at airports. Channels where it is airing include AXV, MTV, National Geographic, and Star News. Media agency is TK. ●



COMING EVENTS

APRIL 27-28

CREATE '06

MEDIA MAGAZINE

PLACE: *The Ritz-Carlton, Bali Resort & Spa*

RESERVATIONS:

[www.mediaspikes.com](http://www.mediaspikes.com);

852-3175 1913

PRICE: NA

APRIL 27

GLOBAL MARKETING SUMMIT

IAA NEW YORK

PLACE: *Park Central Hotel, New York*

RESERVATIONS: [jill.henry@iaany.org](mailto:jill.henry@iaany.org) ;

1-212-338-0222

PRICE: member US \$350;

non-member US\$475

MAY 1-3

5TH FIPP INTERNATIONAL

BUSINESS MAGAZINE

& PROFESSIONAL MEDIA

CONFERENCE

PLACE: *Millennium Hotel & Grosvenor Hotel, London*

RESERVATIONS: [Lucy Fairclough](mailto:Lucy.Fairclough@ppa.co.uk)

[lucy@ppa.co.uk](mailto:lucy@ppa.co.uk);

[www.london06.com](http://www.london06.com)

PRICE: Member £646.25;

non-member £936.48

includes VAT;

fee rises after March 31

MAY 15-16

WFA/UDA GLOBAL

ADVERTISER CONFERENCE

WORLD FEDERATION OF

ADVERTISERS WITH

UNION DES ANNONCEURS

PLACE: *The Westin Paris*

RESERVATIONS:

[paris2006@wfanet.org](mailto:paris2006@wfanet.org);

32-2-502-5740

PRICE: €540 WFA-UDA members;

€700 non members;

gala dinner

€100 member; €200 non-member

MAY 24

D&AD GLOBAL AWARDS

CEREMONY

PLACE: *Old Billingsgate, London*

RESERVATIONS:

[claireg@dandad.co.uk](mailto:claireg@dandad.co.uk);

44-(0)20-7840-1127

PRICE: member £230 includes VAT;

non-member £287.50

includes VAT

## new global look and campaign for credit suisse



Credit Suisse launched a new brand and logo worldwide reflecting a new strategic direction for the bank.

Credit Suisse has brought together its investment banking, private banking, and asset management businesses to provide clients with a more flexible approach and better access to the full range of services.

A new stylized, sail-like logo represents the tradition of investment banking while, at the same time, conveying the notion of pioneering and navigation.

CEO Oswald J. Grübel said the brand is an expression of the bank's international focus, its heritage, and its objectives. "The implementation of a single brand name underscores the fact that we are making our bank's entire expertise available to our clients globally via a single source and that we have a strong and unified presence in the market," he explains.

A new global campaign using print, TV, online, and outdoor by McCann Erickson Frankfurt includes a new tagline "thinking new perspectives" and focuses on Credit Suisse's tradition of innovation in meeting the needs of its clients.

The campaign targets high net worth individuals as well as executive and institutional audiences. The ads present a situation which is accompanied by the first part of the headline: "Some think..." This is, in turn, answered by a "We think..." statement.

In addition to spots globally on BBC, CNBC, and CNN, advertising is running in 17 countries and in leading global financial publications. Media is handled by Initiative, London. ●

## regulations

### PRODUCT PLACEMENT AND AD RULES RELAXED IN EUROPE

The European Commission has loosened rules for product placement in Europe, where most countries have banned the practice, and is allowing more flexibility in when and how commercial TV channels can insert ad breaks in programming. The new rules come under the Commission's "Television without Frontiers" directive. The changes, which make a distinction between traditional and new media, are not without controversy. Those in favor believe it will help broadcasters compete better in an era of rapid technological change. Those opposed say it will limit new media services now covered under the directive. These include services such as video-on-demand and mobile communications. ●

COMING EVENTS

JUNE 14-15  
ONLINE MARKETING EUROPE  
2006

PLACE: *Palacio de Congresos,  
Palma de Mallorca*  
RESERVATIONS: *info@ome2006.com;  
34-971-22-78-86*  
PRICE: *€55 until June 1;  
€65.00 at entrance  
includes VAT*

JUNE 18-24  
53RD INTERNATIONAL  
ADVERTISING FESTIVAL

PLACE: *Palais des Festivals,  
Cannes*  
RESERVATIONS:  
*www.canneslions.com;  
44-(0)20-7239-3400*  
PRICE: *Various ranging up to  
full registration at €2152.80  
includes VAT*

JUNE 28  
ASIAN MARKETING  
EFFECTIVENESS AWARDS

PLACE: *Grand Hyatt, Hong Kong*  
RESERVATIONS:  
*www.mediaeventsasia.com;  
852-3175 1913*  
PRICE: *NA*

SEPTEMBER 7  
PUBLISHING AWARDS

PLACE: *Grand Hyatt, Hong Kong*  
RESERVATIONS: *852-3175 1913*  
PRICE: *NA*

26 SEPTEMBER  
2006 EACA PMC EUROPEAN  
AWARDS CEREMONY

PLACE: *Flagey, Brussels*  
RESERVATIONS:  
*isabelle.prosser@eaca.be*  
PRICE: *€130*

SEPTEMBER 27  
2006 EACA EURO EFFIE  
AWARDS GALA

PLACE: *Flagey, Brussels*  
RESERVATIONS: *www.euro-effie.com*  
PRICE: *€195*

continued on p. 46



## marketers given high marks in asia

Asians have given marketers high marks in new research on the region by Grey Global Group.

The 12-country study examines how urban Asians feel about their lives and their aspirations for the future; what they believe makes a great brand; and what they want—and don't want—from advertising and marketing.

The survey found that 62% of respondent believe marketers are “doing a good job.” Some 63% say they are interested in advertising; 69% find it fun; 64% says it's innovative; 53% say it's exciting.

However, 69% say they feel bombarded with too much advertising and marketing, especially those in Korea (93%) and China (82%).

Additionally, 77% call for more limitations and regulations on advertising and marketing, indicating global and local advertisers alike need to think of self-regulation in regard to cultural and moral sensitivities.

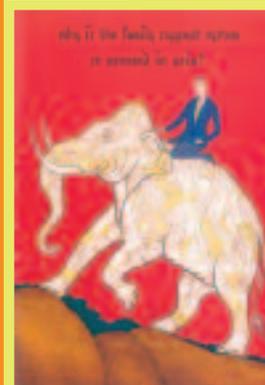
- In Beijing and Shanghai, 86% believe advertising is always overselling;
- Vulgarity is almost universally cited in India and Indonesia, with concern that such ads could trigger criminality or moral corruption among youth;
- Some respondents, particularly Thais, believe advertising is insulting to certain cultural and religious groups.

Global advertising per se is not considered offensive. According to Chris Beaumont, chief strategy officer for Asia Pacific and president, Grey Global Group Japan, global brands are helping to inspire the re-evaluation of values taking place across the region. “Yet being ‘foreign’ in and of itself is no longer as enticing to people as it was in the past,” he explains. “Foreign brands will remain foreign unless they focus more on leveraging their authenticity and brand promises in ways that are relevant to local consumers. The issue is largely about mental accessibility.”

Called “Eye on Asia,” the survey was conducted by Grey and research firm Millward Brown, both part of WPP Group. A total of 4,400 Asian adults age 18+ across 12 countries were surveyed using both quantitative and qualitative research.

Respondents were also asked what makes a great brand. Trust, ease, and innovation are the three factors people consistently cited. ●

*Colorful posters and postcards  
are being used to promote  
Grey Global Group's new research  
on marketing to Asians.*



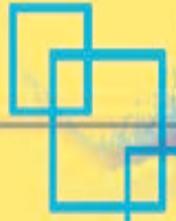
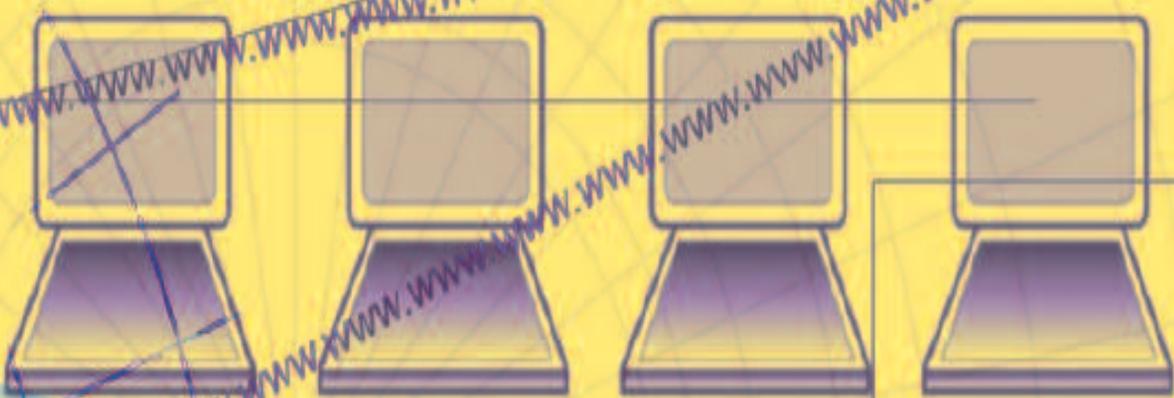
What do industry folk have to say about what marketing integration means today and how far they have come? Execs from clients, agencies, and media companies weigh in.

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# INTEGRATION: BUZZWORD OR REALITY?



BY  
NEIL  
GLUCKIN

As a marketer, the word I associate most readily with the concept of integration is “trust.” In organizations

of every size, the ability to combine ideas, resources, and skills of any kind requires above all a willingness to give up the usually uncomplicated benefits of sole proprietorship (e.g., my product, my budget, my bonus) for the more complicated and often less predictable benefits of collaboration. Integration necessarily blurs or erases lines of ownership. And yet, the economic benefits of integration are beyond question. In the financial services arena, for instance, solutions to complex problems often require integration across product and service areas (at a minimum). Interestingly, the more complex the problem, the more a client must trust the expertise of the solution provider. When trust enters the equation on the client side, it is almost always accompanied by a pronounced willingness to pay more.

On the communications front, although integrating large, multi-faceted advertising programs often requires equal amounts of creativity and stacraft, the benefits here also handsomely repay the effort. At the same, the proliferation of non-traditional media and channels may make it increasingly difficult to distinguish integration from fragmentation.

One area in which integration remains particularly challenging and often untried—though where the potential is enormous—is the internal organizational environment. This has been my principal area of focus over the past three years. In that time, I have seen interest in internal branding grow steadily, even though examples of its successful application remain few and far between. While companies work hard to discipline and focus their external messaging, most do little where employees are concerned. Thus recruitment, training, performance evaluation, and compensation are not typically integrated with each other or with employee

neil gluckin

Executive Director  
Branding  
USB



“At the same time, the proliferation of non-traditional media and channels may make it increasingly difficult to distinguish integration from fragmentation.”

communication, let alone with the brand promises a company makes to its clients.

There is not an area of marketing in which integration can happen for long without trust. And the same is true in reverse: Wherever trust exists, integration is an almost inevitable result.

BY  
YEE FOONG  
YUEN

There is too much clutter. While there is more media available in the Asia-Pacific market today (more print titles, more TV channels, more outdoor sites, more websites), it is getting increasingly hard to reach a target audience that is getting more savvy and selective. This is especially so for the small and medium-sized business (SMB) customer who has unpredictable media habits and a mélange of information sources. To reach out to this growing group of customers, it is necessary to employ various communication touch points to get up close and

personal with them—connecting with them everywhere from where they seek product information (reviews, portals, trade fairs, word-of-mouth) to where they actually shop and buy (on-line and off-line stores).

This is where the integrated marketing mix is vital. While traditional advertising still has a role to play to create awareness, the spectrum is gradually moving towards a combination of on-line and one-to-one marketing.

As far as consumer behavior is concerned today, the internet is where opinions are voiced and perceptions are shaped. This is where the SMB customer will go to gather information that will have an ultimate impact on his or her buying decision. With the internet becoming a mainstay in Korea, Japan, and Australia as well as a burgeoning information source in China and India, it is no wonder that marketers are increasingly placing this flexible and measurable



yee foong yuen

Marcom Manager,  
Personal Sysytems Group & SMB  
HEWLETT-PACKARD ASIA PACIFIC

“More advertisers will accelerate the current change to evaluate the effectiveness of their advertising on a pan-national and international basis.”

digital media at the core of its integrated marketing mix. At HP, a recent region-wide on-line contest where customers were encouraged to submit ideas to win an office IT makeover (and in the process learn about HP's Smart Office solutions for SMBs) met with overwhelming response.

Once customers are aware of what's out there, one-to-one marketing comes in to do the job of triggering the purchase. Through catalogs and electronic direct marketing, customers get to know of promotions and offers and are immediately directed to stores to make their purchases. From there, relationships are cultivated and loyalty is built.

BY  
IAN G.  
BEAVIS

After 30 years in this business, I am still amazed at the lack of marketing integration nationally and internationally. Even more amazing is the willingness by some marketers to ignore it and hope to succeed in an increasingly global and fragmented marketplace.

Integration is a business imperative that must be totally embraced at all levels of an organization. So what do I mean? It must live at the very foundation of the business operating plan for every part of the company. Only if it starts there does it have any chance of seeing the light of day in the operating units and ultimately, marketing.

In order to achieve integration of marketing communications, you must start with all partners (internally and externally) strategically aligned with a clear understanding of the expected outcome. You can often (but not always) achieve this more easily with a one-stop shop. However, in my world, a skilled, focused marketing organization can just as easily achieve the same result. Everyone just needs to keep their eye

ian g. beavis

Vice President-Marketing,  
Public Relations & Product Planning,  
KIA MOTORS AMERICA



"There needs to be a thread that will allow a consumer to easily and consistently connect with the message irrespective of where they receive it."

on the business outcome and leave their territorial, not-invented-here attitudes at home. The CMO will have to be prepared to be an enforcer to keep things on track.

Once you have strategic agreement and alignment, life gets much simpler. When you move into the execution phase, look for the best ideas that can (a) achieve objectives and (b) extend vertically and horizontally across media, audiences, and geography. It doesn't mean one size fits all. It does mean there needs to be a thread that will allow a consumer to easily and consistently connect with the message irrespective of where they receive it. In my experience, these ideas will emerge only when they come from partners who respect each other, are strategically aligned, and have a marketing leader prepared to make the right decisions.

True marketing integration is hard, but the benefits far outweigh the effort required to achieve it. Mark my words, once you do it correctly and see the results, you're hooked. It energizes the company, brings respect to the marketing organization and can even help you make friends with the CFO.

BY  
RICHARD  
PINDER

Integrated marketing communications is changing advertising, public relations, and marketing. Some call it synergy, some call it seamless.

richard pinder

Regional President for EMEA  
LEO BURNETT



"However you describe integrated marketing communications today, what is clear is that consumers don't see a 'line' between the more traditional forms of advertising and the more cutting-edge forms."

However you describe integrated marketing communications today, what is clear is that consumers don't see a "line" between the more traditional forms of advertising and the more cutting-edge forms. Clients increasingly don't see a "line"—so we as agencies certainly shouldn't either. Consumers see a brand live in all aspects of communications so for a company to effectively talk to its customers we as agencies

BY  
JOHN J.  
MCMENAMIN

Integration is becoming the new marketing buzzword, although it really has been around since the early 90s. Today, however, with the emergence of many new communication platforms, it has taken on a new meaning.

Integration used to be comprised of media deals sold across a variety of media channels offered by a single media owner. The client was often looking for a larger discount by spending more across the channels, and the media owner was looking to drive increased spend through value added programs. Today, with more content delivered across more media platforms, as opposed to similar type channels, and “choice” now empowered on the consumer side, “platform integration” becomes critical. Marketers are not simply looking for more pages or spots across multiple magazines, TV networks, or newspapers, but are looking for meaningful ways to use various print, television, internet, outdoor, and wireless networks to increase “consumer touch points.”

Audience fragmentation is the new reality, and with the consumer having more and more control over when and how they access content, integration becomes the necessary path for marketers to seek out and find the consumer audience they are trying to reach.

Integration today is not just about finding the consumer through platforms of various scale, it is about reaching the right audience, with the right message at a time that will deliver the greatest relevancy between the message and the consumer.

Demographic targeting is giving way to psychographics, and a well-executed integrated plan will allow the marketer to target in a far more relevant fashion than the “old” demographic formula ever did.

So, what are today’s marketers looking for from media owners in order to successfully execute an integrated plan? In a word, partnership.

With the fast pace of change occurring in the media world, no one holds all the information, let alone answers. Partnership is a two-way

need to be able to offer solutions that can start from any aspect of the communications mix. It’s not rocket science but structuring an agency to best do this does require a fresh look.

The days of permanent silos or fixed matrix management are giving way necessarily to temporary team based organizations—teams that re-form, separate, and re-form according to the needs of the business but where all the players are chosen for their separate skills and are required to work together for a common goal or need.

Integrated marketing communications is common sense. Instead of dividing communications into several overlapping departments, organizations use one strategy for everything, making every communication consistent with one message and one strategy. For example, once a company decides how it is uniquely able to meet a

particular consumer need, every message is based on those conclusions. Since there is one message, everyone from the receptionist to the CEO can be a salesperson for that message.

Burnett learned a lot by doing this in its Australian business. There a single executive, Andrew Edwards, led two Publicis sister agencies, Arc, specializing in marketing services, and LB Sydney, focusing on advertising. He placed heavy emphasis on having single account teams for each client rather than separate account teams for each by discipline. The members of the client’s team would come and go according to need but it would be one cross-functional team. Now, Edwards is serving as regional president of Arc EMEA, and the same type of organization is starting to happen with the planning and the creative departments in Europe. In this way, we end up organizing around a client’s needs rather than around our product offering and driving margins up. This is truly a win-win situation for all concerned.

john mcmenamin

Managing Director, International  
DOW JONES & CO.



“Integration today is not just about finding the consumer through platforms of various scale, it is about reaching the right audience, with the right message at a time that will deliver the greatest relevancy between the message and the consumer.”

street between the media owner and the marketer. Marketers are looking for multi-dimensional sales people who understand the entire marketing equation. Salespeople, who, once the marketer outlines the objectives, will not simply sell various platforms, but integrate them in a fashion that delivers on the objectives. This goes beyond simply selling multiple platforms, but rather presenting a strategy as to why and how the various platforms work together. This should address not simply who is reached, but in what physical environment, in what relevant content environment, in what consumer mindset, case studies on successful messaging elements, what effectiveness research options exist as part of the plan, what aspects of the plan offer proprietary opportunities, and finally how can the core elements of the plan be refined and build over time.

Marketers are looking for this type of long-term partnership to create a shared relationship between themselves, the media owners, and most importantly the consumer.

BY  
CHRIS  
DOBSON

Marketers' definition of an "integrated campaign" has changed dramatically over the course of the last decade, not only due to the advances in technology within the marketing industry, but also with the shift in consumers' media consumption habits.

With European consumers spending an average of 10.25 hours a week online, the online audience has now reached critical mass. This has driven brand marketers to reassess their media buying strategies to include online as an integral part of any communication campaign. The success of the internet as a media channel has paved the way for new digital marketing disciplines to come to the fore.

Integrated communications must involve online from the outset rather than as an afterthought. Online advertising has seen record growth in 2005, with online ad spend in the U.K. up by 62% over last year and online ad



chris dobson

General Manager,  
Sales & Trade Marketing  
MSN INTERNATIONAL

"The very term 'integrated campaign' is taking on a different meaning, and it's one of the biggest challenges for the whole media industry."

revenues in the U.S. believed to have broken the \$12 billion mark for 2005. Hand in hand with this growth has been a shift in marketers' advertising spend from traditional media to digital campaigns. Online advertising has already overtaken the

market share of the radio and outdoor advertising sectors in the U.K., according to IAB/PwC research, and other markets are set to follow suit. But the market is still short term biased indicating that true planning integration is still not happening for most clients

The very term "integrated campaign" is taking on a different meaning and is one of the biggest challenges for the media industry. At Microsoft, we see the reality of digital media convergence from a number of angles, but the fact that 50% of U.S.-sold Windows XP operating systems are "media center edition" shows that consumers are increasingly embracing the technology to make it happen.

This presents a problem for the integrated campaign (or an opportunity?) in that the very nature of media such as TV will have to change. Campaigns will have to be much more integrated to succeed and really embrace the interactivity and "instant answers/information" that consumers demand (across increasingly diverse devices such as mobile). The fact is the consumption of media is close to fundamental change, but the notion of truly integrated media campaigns is some way behind.

Panelists at a Cannes Lions seminar last summer struck a chord with marketers when they concluded that the media landscape in 2010 would be "multi-layered" rather than single-channel, hinting that integrated communications are coming of age. There's a definite recognition among traditional advertising agencies that the segmentation of media should be embraced rather than treated as something to be wary of, with big brands embracing new digital advertising opportunities, from blogging to search to mobile. This will certainly help clients catch up with consumers and is rapidly

becoming one of the main differentiators in client media pitches for agencies.

Finally, online provides the most important new opportunity for creative development since the launch of television advertising and is opening up unparalleled opportunities for fresh thinking and new ideas, while proving itself as the only medium that truly crosses boundaries, fulfilling the need for different cultural, language, and promotional needs.

Consumers are currently 45% more likely to remember advertising if there is an online component. To not embrace this phenomenon is much more than a neutral effect—the laggards run the considerable risk of actively helping their competitors—if your TV ad elicits an action to search for more detail and your competitor is superior in THAT space (search keywords) then your ad runs the risk of being free promotion for all except your product.

BY  
ANNE  
PAPPAS

Effective integrated marketing can be a powerful tool for marketers to communicate the values of their brand, engage their audiences, create new demand for their products, and grow their businesses. The key is consistency in messaging, whether using more traditional media like print and outdoor, or other platforms like event sponsorship, the internet, mobile, SMS, product placement, loyalty programs, or branded content programming. And that's not all: Ensuring that the internal communications are totally in line with the external communications and that employee behavior is aligned with the brand promise are also key. Nothing sets a company back more than promising in a multi-million dollar ad campaign the ability to deliver 24 x 7 customer service, when it doesn't happen.

anne pappas

Director, Marketing-Asia Pacific  
CNBC



“Effective integrated marketing can be a powerful tool for marketers to communicate the values of their brand, engage their audiences, create new demand for their products, and grow their businesses.”

Absolut vodka is a master of integrated marketing. Its campaign is legendary, and it evolved in so many ways while managing to retain the brand's core values with wit and imagination. Absolut was in product-placement heaven as part of a story line in HBO's "Sex in the City." TBWA created a campaign for the scriptwriters, featuring a Times Square billboard showing one of the characters, PR-maven Samantha Jones' struggling actor boyfriend positioned with an Absolut bottle between his legs. The tagline: Absolut Hunk.

Creativity and art have been the mainstays of this brand. In 1985, Absolut invited Andy Warhol to interpret its bottle. It not only marked the arrival of Absolut in the world of art, confirming the iconic status of the bottle and the brand in international design, but it also led to more than 400 pieces of major art projects and individual collaborations.

Apple's "Think Different" and HSBC's "The world's local bank" are some of the other brilliant campaigns that reflect smart integrated marketing efforts. HSBC was able to reinforce the message that customers got the local knowledge and personal service expected from a local bank and also a level of global knowledge and widely sourced expertise that wouldn't be expected.

HSBC was in all major airports around the world with this message. And whether in an HSBC branch in London, Singapore, or New York, you felt you were getting local knowledge with access to global expertise. With Apple, its ability to "Think Different" was a claim it lived up to as it evolved and led a revolution in product development with the launch of the iPod. Apple lives the brand. There is no better testimony than campaigns that have sustained over time, and have lived up to their brand promise in more ways than one.

Marketers are challenged with an epic battle of looking for new methods to promote brands in relevant and engaging ways that keep pace with shifting consumption habits. Effective integrated marketing can only help make the message have more impact, be more enduring, and can potentially help brands access new audiences while staying dynamic and relevant to existing ones. •



## tim ellis

A creative that breaks the mold at Volvo,  
a company once considered quite staid and stodgy.

He may be clad in a designer suit and look like just about any corporate executive anywhere in the world, but Tim Ellis, Volvo's director of global advertising and media, has a creative mind that broke the mold.

Ellis made the shift from agency (Forsman & Bodenfors in Sweden for nine years and before that San Francisco's Goodby Silverstein & Partners) to client three years ago, wooed by Volvo execs impressed with his creative panache.

"There were only a few brands I would have considered moving over to in terms of clients, and Volvo was one of those few," says Ellis, an American with a Swedish wife. "There is so much potential in this brand. Cars are getting more attractive and more interesting, and consumers seem to be willing to revise their viewpoints."

Long positioned for its high safety ratings, but considered staid and somewhat stodgy, Volvo was ready to break out of that mold. Ellis obliged.

"They hired me because of my creative experience," says Ellis, adding quickly, "And sometimes they're afraid of me. My job is to provoke people, both consumers and within the company."

The "mystery of Dalaro" campaign must have scared the beejeezus out of some folks at the staid Volvo and, in fact, it didn't end up running in three European countries because of reservations about just how radical the campaign was.

Ellis' creative genius, hand-in-hand with agency efforts from Euro RSCG in New York, Fuel Europe in London, Forsman in Sweden, MindShare for media planning, M1 for digital, and 4D for interactive, has produced work that has literally had the whole world talking.

One of the most clever and effective campaigns was the 2004 "Mystery of Dalaro," to introduce the Volvo S40 in Europe. The campaign was based on a planted "news" story that 32 families in the small town of Dalaro, Sweden, bought new Volvo S40s from the same dealer on the same day—a dealer that normally didn't sell 32 cars in a year.

"Spooky," proclaimed Britain's Channel 4.

Next step (as the story goes): Volvo hires Venezuelan film director Carlos Soto to travel to Dalaro and make a documentary about this mystery—portions of which were aired in a television commercial across Europe, except for Germany, Italy and Sweden, and available to watch in its entirety on Volvo's website.

Next layer: Soto claims the whole story may be fraudulent and says on his website that he may have been duped into participating in an advertising campaign.

Ad-rag.com com dubs the Soto work a "mocumentary," proclaims that Carlos Soto does not exist, links his website to Fuel Europe, and quotes Ellis as saying, "Even though it comes off as quite serious, the story is actually very playful—once you think you've got it, we offer one more layer to the communication to question that assumption."

The story was all the rage in Europe. It was the subject of endless chatroom discussions, including a participant who said, "Quoting Jungian theory and citing different impressive statistics, the documentary is an entertaining piece. It's so well done, this leaves the viewer wondering if the 'Mystery of Dalaro' is in fact a true happening or not. To be truthful, it's a fictitious story

[created by Fuel Europe] that has been so successful, it's fooled more than a few visitors to the Volvo sites." And, in fact, Soto was another piece of the fiction. The documentary was actually produced by Spike Jones.

The final layer (perhaps): Ellis says he was vacationing in New Hampshire more than a year

*Tim Ellis says his job is to provoke people, both consumers and colleagues.*



after the campaign broke in Europe. Although the campaign did not run in the U.S., Ellis says he met a woman in a bar, who, totally ignorant of Ellis' position with Volvo, told him the story of Dalaro. Hmm. Is this just part of the story? The myth goes on.

And what a run! Google "Dalaro" and you'll get 193,000 hits—the vast majority related to the Volvo campaign.

"It worked. It completely worked," says a jubilant Ellis. "We never told the world this was just a marketing campaign."

A good part of Ellis' ability to do his job revolves around his ability to translate a small ad budget into big returns.

Volvo had half the media budget of its competitors, sometimes only one-third of the budget. "We did this just to survive. Creativity is a business necessity. Our media have to work harder for us than for our competitors. We have to be more targeted," says Ellis.

Volvo has excelled at using the traditional media to arouse curiosity and intrigue—and, of course, to educate the public about its cars.

"We used the mass media to pull people in to our website as opposed to pushing them in," says Ellis.

The "Mystery of Dalaro" was a hard act to follow, but Ellis' team at Fuel Europe created new buzz with a totally different, and admittedly more sedate, campaign called "Life on Board." This one was created to raise awareness of the seven Volvo models.

Aired as traditional 30-second television spots, these ads promote Volvo as a way of engaging in interesting social interaction.

The ads featured pairings of fascinating people who had never met before, all of them getting to know each other while riding in a Volvo. Among them: surfer Bethany Hamilton, who lost an arm in a shark attack, and jockey Greta Kuntzweiler, chatting about danger and their lives; and Chris Gardner, one of the most successful stockbrokers on Wall Street who was once homeless, chatting with psychologist Dr. Richard Wiseman about success.

The kicker is that each TV ad is simply a tease: Much longer versions of the conversations can be viewed at Volvo's website.

The idea behind "Life on Board" was to position Volvo as human and warm. "There's a lot of metal out there, and it's very impersonal,"

Ellis explains. "Most advertising talks about the driver. Volvo focuses on the social interaction between the driver and the passengers."

"Life on Board" won a titanium, awarded for a big idea, at Cannes and several other awards.

Ellis has quite successfully parlayed what he calls a "disadvantage" in media spending to using content to invite people to its website, encouraging them to become more involved with the brand.

He says, "Above-the-line and below-the-line media we created pull people into the central hub of our website. It has resulted in getting more people into our website and spending much more time there."

Safety has always been Volvo's point of entry in the premium category. "We're not in any way moving away from that," says Ellis. "It's a matter of how we lead in safety that redefines what safety means. It means technological advances and reflects a more sophisticated product."

In his efforts to close the "emotional perception gap" that Volvo differs from other luxury cars in the same price range, Volvo's recent designs are more upscale and share the comfort, performance and style of BMW, Audi, and Mercedes, with the important difference of safety considerations. "It's a more practical emotional purchase," says Ellis.

For example, Volvo's concept cars have a safety device called BLISS for blind spot detection. "When a car is in your blind spot, a light blinks. Call it convenience or call it safety, it makes you a safer driver. Volvo is not just about protection in case you get hit or in a crash. That's just sort of the beginning," says Ellis.

For its small budget, Volvo allocates a significant portion to non-traditional venues aimed at a tightly targeted audience, including mobile communications. The company has an agreement with British Airways to sponsor a channel of Volvo films in business lounges. Passengers can download films on their PDAs or cell phones as well as watching them on planes.

Has it worked? Look at the numbers:

"While we have only one-third to one-half the budget of our competitors, we are No. 1 in advertising awareness, [according to Volvo's tracking studies]," says Ellis. ●



*Volvo's "Mystery of Dalarna" campaign,*

*spearheaded by Tim Ellis, created*

*a sensation throughout Europe with the*

*planted "news" story and subsequent*

*"documentary" by a famous, but*

*non-existent director. The storyline:*

*32 families in a small Swedish town*

*bought new Volvo S40s on the same day.*

*Volvo never publicly admitted to the*

*general public that the sensational low-*

*cost campaign was a marketing ploy.*



# whose line is it anyway?

Over the last 20 years or so, the marketing communications business has segmented itself into “lines”—above-the-line, below-the-line, and the lines between media agencies and creative agencies.

Even more lines are being drawn now. The line between digital and analogue agencies and the plethora of others including the lines drawn between brand consultants and ad agencies.

But where do the lines intersect and overlap? Who is the most appropriate keeper of the keys? The landscape has shifted, and agencies must transform their old ways. No matter which way you dissect the grid, the idea has to be the key.

I have a reasonably unique perspective on this matter having spent 16 years with a full service agency before starting my own strategy consulting company in Japan, which transformed into a media strategy independent business. I sold it to Carat, then helped establish Isobar (Aegis’ digital brand) in Asia. Now I’m with M&C Saatchi (more about why I joined them, later). In a nutshell, I’ve seen the business from many angles.

## a bit of history

As we know, media agencies were created and have succeeded on the basis that they could offer clients cheaper rates and better clout due to their increased critical mass against media owners. That was fine until commissions reached rock bottom and the holding companies needed to find extra sources of revenue and grow margin. Now we see media agencies offering added-value services like communications planning and, in some cases, creative services to rebuild margins.

The greatest asset media agencies have in this regard is their access to hard data and, usually, lot of talented folks on staff who can make sense of it all.

They would argue that they should hold the keys.

Not so in the thriving Japanese market. The difference is that Japanese agencies handle conflicting clients. A fact well known, but few understand the reason why. Most Japanese agencies

“ The marketing communications business has segmented itself into ‘lines.’ ”

started life as media sales houses, selling media to clients. Naturally, they could not limit themselves to one client per category and no client expected them to. However, what that means is that clients are often unwilling to reveal confidential data and information to their agencies and tend to do most of the strategy work internally, briefing their agencies only on executional requirements. Under this model, the client is the keeper of the keys. Agencies merely execute.

Include ad agencies and marketing consultants into the mix and the theories and approaches become endless.

## so what works best?

It’s actually quite simple. There is a glue that holds them all together—the idea. A big, but simple idea.

As companies and their managements become more accountable for performance on a quarterly or even monthly basis, the notion of pure long-term brand-building at the expense of short-term sales is no longer an option.

Marketing communications should strive to do both.

Analytical, left brain thinking, abundant in media agencies, is valuable, and the marketer certainly has the most intimate view of its own business. But I would argue that while an understanding of the brand



architecture is crucial and the media contact points vital, ultimately it's all about the idea.

### "birds of a feather..."

The striking difference I've noticed in moving from a (very good) media specialist to a (very good) creative agency is the incredible contrast between the people types. Not surprisingly, media agencies are heavy on left-brain, analytical types while "creative" agencies abound with right-brainers...and the fact is, you need both. To evolve an "idea" you need true creative folks with a holistic mindset, the kind more likely to be found in very good advertising agencies. That's where the central idea is most often born; that's where the keys should reside. A company that combines analytics with creativity is therefore best to create and maintain guardianship.

### the power of simplicity

Albert Einstein said: "Things should be made as simple as possible, but no simpler." It's also a truism that it's far easier to complicate than to simplify, yet simple messages enter the heart (and mind) faster and stay there longer. These are key principles of M&C Saatchi where we believe in "Brutally Simple Thinking." Simple strategies and big, simple ideas are easier to sell to clients too. Simple ideas should lead to simple, single-minded executions that have a greater chance to cut through. Simple ideas transcend media. They can be applied to digital, outdoor, direct marketing, and all the traditional media channels with relative ease.

### getting paid for ideas

An idea can come in a flash or can take months of research, analysis, creative thought, and experimentation. Yet a good idea can transform a company, lift sales, motivate people. While companies insist on measuring marketing management performance on cost reduction KPIs and insist on using purchasing officers to negotiate contracts as they would buying paper supplies, we cannot hope to get properly compensated for ideas unless linked to a measurable, such as sales. If we value our work, we also need to get better at protecting our ideas. If we don't value it, we can't blame clients who don't either. We must protect ourselves from unscrupulous companies who hold pitches as a means to fish for ideas, passing one agency's good work to the successful awardee (I've seen it happen).

“  
We cannot  
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a measurable.”

As an industry, we cannot hope to attract the best and brightest with lower salaries for talent and less time and money to train them. I digress...

### the digital dividing line

An idea is an idea. It's not a "digital" idea or an "analogue" one. As mentioned before, a good idea transcends all. For this reason, I believe that very good agencies should be thinking media-neutral ideas and be able to conceptualize, if not execute them, across all channels, particularly digital and analogue. If we believe the media pundits who foretell that by 2010, around 70% of media will be digitally delivered (include mobiles, PDAs, digital TV, and radio), then it's not a particularly wise career path for folks who remain blinkered to print and TV. Many global agency groups have created a rod for their own backs now by setting up dedicated digital divisions, with separate P&Ls. It basically inhibits the "idea" agencies from getting digitally involved. Needless to say, we usually integrate our digital offering into the agency. Also, through a village concept, we work flexibly with channel experts in fields where we do not have the required level of specialization or expertise. Clients get single, holistic solutions with big, simple ideas. No lines there!

In summary, (and probably not surprisingly): The new currency in marketing communications is ideas. Simple, big ideas that deliver to clients short-term needs as well as adding value to the brand. Ideas that transcend lines our industry has created.

If this idea concept is simple and big enough, then we should be able to communicate it more effectively to marketers the world over and convince them to pay more equitably for it. This will allow us to continue to attract great talent and assure us that the business will still have a value in the years to come.

So whose line is it? Answer: What line? The idea-centric agency must exist at the intersection of any and all lines. No longer just media-neutral, but discipline-neutral thinking. Regardless of what they call themselves, ad agency, brand consultancy, idea agency (or, in our case M&C Saatchi), the old fashion lines must disappear. ●

*Kim Walker is president & CEO,  
M&C Saatchi Asia.*

Catching the Travel Bug

Affluent travelers are getting special attention in campaigns for InterContinental Hotels and Exclusive Resorts. Meanwhile, other advertisers in the travel and tourism category are finding different ways to attract attention. To Americans, Israel is presenting itself as a place where they can enjoy a vacation of beaches and sun in combination with seeing religious and historical places while the emphasis in Europe is more on fun and sun.

India, which has found interest increasing across many countries, is positioning itself as a repeat-visit, year-long destination to a number of markets. Ever since 9-11, many tourism appeals have changed. Holland America now promotes a cruise as a way to re-connect with family and friends on a vacation where people can be together yet apart. Here *inter national ist* looks at some recent campaigns. ●

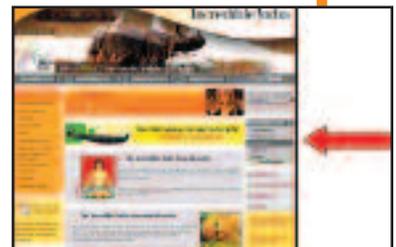


INDIA

After establishing an identity for the country, "Incredible India," starting in 2003, tourism campaigns, handled by different tourist boards, are focusing on showcasing various destinations in the country. Says Rajeev Dhal, national activation director, MAXUS India, which handles media for many of the campaigns, tourism growth has increased greatly because of the interest in India across key countries, spurred in part by the availability of information in search media. Sister agency



Ogilvy & Mather handles creative. "India as a potential economic stronghold is felt universally, and is expected to grow in future," he says. "This will fuel business tourism growth."



HOLLAND AMERICA

The difference is in the details. That's the message of the Holland America Line campaign designed to appeal to the experienced cruiser. Veteran cruisers know what is important in a cruise, says Richard D. Meadows, senior VP-marketing and sales at Holland America Line; they appreciate refinement and attention to detail. "This campaign aligns those signature features with an exceptional guest experience."

Created by DDB Seattle with media by OMD Seattle, the campaign has evolved from a shift that took place after 9-11 when advertising had to become more short-term-oriented and tactical. As the economy has improved and spending gone back up for vacations, we've seen a great re-connection with friends and family," explains Hillary Miller, senior VP-strategy director at DDB Seattle. "People are less about going to the beach for a week or going to a weekend in Manhattan," she says.





ISRAEL

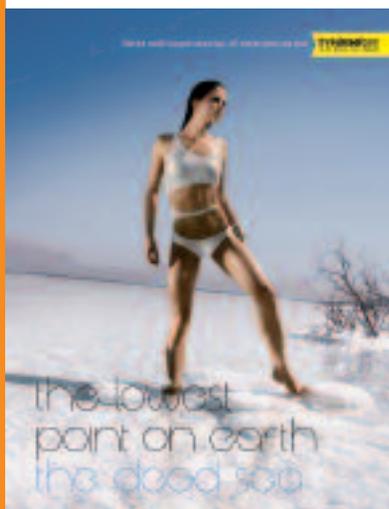
The Israel Ministry of Tourism recently broke its largest ever media campaign at \$3.5 million in the U.S. to introduce the "other Israel," the one Americans don't see on the news or view outside of a religious context, says Consul Arie Sommer, Tourism Commissioner for North and South America.

With the theme, "Israel—Who Knew?" stressing what Israel is really about, the campaign shows images of beautiful landscapes, exciting Tel Aviv night life, historical sites, architecture, art, and other attractions associated with leisure and fun.

Although the U.S. is historically a major market for tourism to Israel, there are large segments of American travelers that have not been tapped yet, Sommer says. "We have to change the way people think about Israel. I hope that in 2006 we will reach the goal of three million tourists."

He says the approach is different from Europe because of different expectations for a vacation. For instance, many Europeans go overseas looking for fun-in-sun destinations to escape the winter. "We stress the difference in temperature."

This approach cannot be used in the U.S. for the simple reason of distance. "We don't think people are going to come all the way from the U.S. just for a fun vacation since they can find it in other places much closer and much cheaper," he says. So in the U.S., the approach encompasses cultural, historical, and emotional messages. Kerwin Communications handles the U.S. advertising.



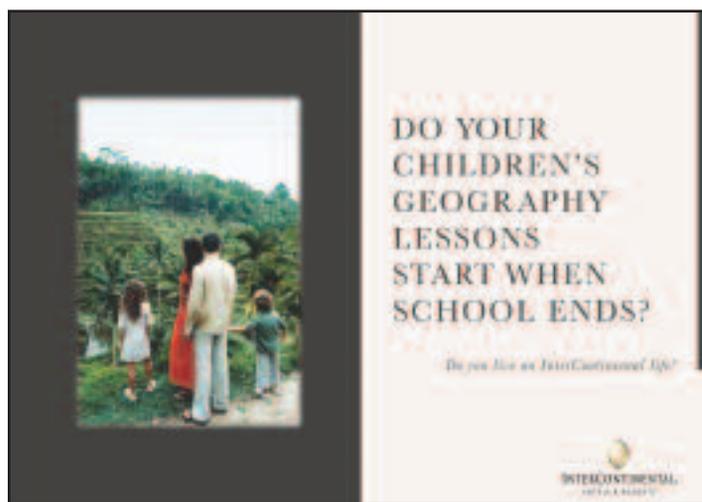
INTERCONTINENTAL HOTELS & RESORTS

InterContinental Hotels & Resorts is running a worldwide multi-media campaign challenging the audience with the question, "Do you live an InterContinental life?"

According to Jenifer Zeigler, senior VP-global brand management, InterContinental Hotels & Resorts, research shows that "in all markets there is a new type of affluent customer...defined more by their attitudes to travel than by basic demographics." She says this customer is looking for more than a luxury environment and consistent service when choosing a hotel.

For them, new and authentic travel experiences are important. "They are looking for a brand that genuinely understands that true luxury is about enjoying experiences, not just owning material things," she says.

The campaign by Leagas Delaney, London, includes newspapers in hub cities in the U.S. and U.K, financial publications, such as BusinessWeek, The Economist, The Financial Times, Forbes, The Wall Street Journal, in-flight media, and CNN International.



EXCLUSIVE RESORTS

Poised to expand its membership base outside the U.S., Exclusive Resorts, a luxury residence club, has launched its first U.S. campaign aimed at vacationers with net worth in excess of \$3 million. The company currently has 1,800 members and a portfolio of 260 multimillion dollar vacation residences in 35 destinations. The campaign By DDB Seattle with media by OMD is designed to set Exclusive Resorts apart from the average vacation. Meanwhile, the company is studying the differences in what Americans and Europeans want in a vacation to prepare for positioning the brand in Europe. "We've already found interesting tidbits such as the British preference for shorter holiday 'snacks' rather than the typical week-long American vacation. Or that the French far exceed other nationalities in their desire to travel with a large group of family or friends," notes Hillary Miller, the agency's senior VP-strategy director.



## subscriptions now main source of commercial tv revenue in europe

YEAR	AD EXPENDITURE		SUBSCRIPTION REVENUES		YEAR	MULTICHANNEL PENETRATION*		DIGITAL PAY TV PENETRATION	
	US\$ IN MILLIONS					%			
1991	19.3		6.7		1991	21.6		0.0	
1995	24.1		12.9		1995	34.9		0.0	
1996	24.4		14.9		1996	39.4		0.4	
2000	32.5		22.5		2000	51.8		12.1	
2004	30.7		29.4		2004	57.8		21.2	
2005	30.8		31.4		2005	60.0		24.8	
2006	31.5		34.1		2006	61.7		27.4	
2007	32.3		36.6		2007	63.7		30.3	
2008	33.0		39.2		2008	65.0		32.6	
2009	34.3		41.5		2009	66.4		34.9	
2010	35.2		43.5		2010	68.0		37.1	
2012	37.6		47.7		2012	70.4		40.6	
2014	39.9		52.3		2014	71.8		43.0	

Constant 2004 prices

\*excludes free-DTT to avoid double-counting homes with free-DTT and pay cable/satellite

Source: Zenithoptimedia

research topic: MEDIA CONSUMPTION geography: WESTERN EUROPE study by: INTERVIEW-NSS

% AVERAGE ISSUE READERSHIP	EMS REGULAR		EMS SELECT		% VIEWED IN PAST 30 DAYS	EMS REGULAR		EMS SELECT	
	8/2004 -7/2005	7/2003 -7/2004	8/2004 -7/2005	7/2003 -7/2004		8/2004 -7/2005	7/2003 -7/2004	8/2004 -7/2005	7/2003 -7/2004
<i>National Geographic*</i>	13.6	12.7	17.8	16.1	Eurosport	46.0	44.5	49.2	50.0
<i>Reader's Digest*</i>	6.8	6.7	7.2	7.4	MTV	41.2	40.8	43.4	44.9
<i>Time</i>	2.9	2.8	4.8	5.2	CNN	34.5	33.6	46.3	47.8
<i>The Economist</i>	1.8	1.8	4.2	4.3	Arte	34.4	33.8	32.0	32.1
<i>Financial Times</i>	1.5	1.5	4.4	4.3	Euronews	28.5	28.1	33.2	32.6
<i>Newsweek</i>	1.4	1.3	2.7	3.0	Discovery	27.0	25.0	32.9	31.0
<i>Scientific American</i>	1.3	1.4	2.0	2.4	National Geographic Channel	23.0	21.6	28.3	26.8
<i>Harvard Business Review</i>	0.9	1.0	3.1	2.8	BBC World	22.9	21.7	32.6	31.8
<i>BusinessWeek</i>	0.7	0.7	1.8	1.9	Sky News	22.7	22.4	32.5	32.5
<i>Fortune</i>	0.5	0.6	1.1	1.3	CNBC	14.2	13.8	20.8	20.3
<i>Euromoney</i>	0.5	0.4	1.0	1.3	Travel Channel	12.4	12.3	14.1	13.4
<i>Institutional Investor</i>	0.5	0.4	1.0	0.8	TV5	12.0	12.3	15.0	16.0
<i>Forbes</i>	0.4	0.5	1.0	1.3	Bloomberg	9.5	9.8	16.1	15.7
<i>International Herald Tribune</i>	0.3	0.3	1.0	0.9					
<i>USA Today</i>	0.3	0.3	0.6	0.8					
<i>Wall Street Journal Europe</i>	0.3	0.3	0.7	0.8					
<i>The Business</i>	0.3	0.3	0.6	0.8					

\*includes all language versions in EMS countries.

Sample size: For EMS, 12,000 representing a universe of 40 million Europeans, or top 13% of the most affluent and influential; for EMS Select, 7,000 representing 8 million, or 3%.

Source: EMS 2005/ EMS Select 2005 Winter Release, Interview-NSS.

## surveying finance execs

BY NIGEL JACKLIN

Wherever they are based, senior finance executives remain heavy consumers of international TV and print media, according to the recently published *Global Capital Markets Survey*. The survey shows that some traditional media have increased their levels of reach since the last survey was published in 2003, reflecting improvements made to both content and distribution in different regions.

The 10,597 CFOs, treasurers, and corporate bankers represented by the survey are a key target audience for banks and other finance and corporate advertisers. Some 46% watched international TV yesterday, 63% read an international daily newspaper, 81% an international trade or business magazine.

### the world's most senior audience?

The *Global Capital Markets Survey* represents the most senior financial decision makers (CFOs and treasurers) in the world's 2,000 largest organizations and the corporate banking community. These two groups, though small in numbers, are of the utmost importance to many international bank and financial services advertisers. This survey with a sample of 1,551, one in seven of the individuals represented by the survey, has sufficient data to allow analysis for each of the three regions surveyed (Americas, Europe, Asia/Pacific). Fieldwork was conducted by Objective Research and Synovate between May and November 2005 via a four-page mailed questionnaire. It was sponsored by CNN, *The Economist*, *Euromoney*, *Financial Times*, and *Institutional Investor*.

### growth markets

This year, Brazil, China, India, Mexico, Russia, and South Africa were included for the first time, bringing the total the total number of countries covered to 31 although the bulk of the survey universe remains in the major developed economies. The 31 countries represent 88% of global GDP, with the new ones accounting for 11%.

### media preferences

While virtually all of this group (94%) access websites at work or at home, only seven web properties are used by more than 5% of this elite group in a typical week, with the top two, Bloomberg.com and CNN.com, being used by 19% and 17%, respectively. While there have been some increases in use levels, the results suggest that the more senior the audience, the more they prefer traditional media. While some commentators are of the opinion that this is simply a matter of age and habits, the fact that 83% of this group have access to electronic information sources such as Bloomberg (60%) or Reuters (46%) suggests other factors are at work. I suspect the fact that such senior individuals are not bound to their desks all day is part of the explanation, combined with the ability of traditional media to impart a high volume of need to know information in an easily digestible format. The study measured readership of 260 publications, viewing of 40 TV channels, and use of 38 websites. ●  
*Nigel Jacklin is managing director, Objective Research.*

## average issue readership • % reach

GLOBAL	AMERICAS	EUROPE	ASIA PACIFIC
<i>Financial Times</i> 43	<i>Wall Street Journal</i> 78	<i>Financial Times</i> 52	<i>The Economist</i> 35
<i>The Economist</i> 40	<i>BusinessWeek</i> 45	<i>The Economist</i> 42	<i>Euromoney</i> 34
<i>Wall Street Journal</i> 36	<i>CFO</i> 41	<i>Euromoney</i> 37	<i>Financial Times</i> 33
<i>Euromoney</i> 34	<i>Economist</i> 41	<i>The Banker</i> 29	<i>The Banker</i> 27
<i>The Banker</i> 25	<i>Institutional Investor</i> 40	<i>Bloomberg Markets</i> 23	<i>Wall Street Journal</i> 26
<i>Bloomberg Markets</i> 25	<i>Fortune</i> 40	<i>Institutional Investor</i> 18	<i>Asiamoney</i> 26

viewing of international TV channels  
% weekly

GLOBAL	
C N N	60
C N B C	38
B B C W O R L D	34
B L O O M B E R G	33
REGIONAL	
B L O O M B E R G	30 34 37
B B C W O R L D	25 36 42
C N N	81 51 60
AMERICAS	61
EUROPE	27
ASIA	38
C N B C	

website reach • % last seven days

BLOOMBERG.COM	19
CNN.COM	17
REUTERS.COM	13
FT.COM	9
WSJ.COM	8
ECONOMIST.COM	6
BBCWORLD.COM	6

ANHOLT-GMI  
CITY BRANDS  
INDEX

A RANKING OF  
30 GLOBAL CITIES  
BY 17,000+  
RESPONDENTS  
WORLDWIDE

- 1 LONDON
- 2 PARIS
- 3 SYDNEY
- 4 ROME
- 5 BARCELONA
- 6 AMSTERDAM
- 7 NEW YORK
- 8 LOS ANGELES
- 9 MADRID
- 10 BERLIN
- 11 SAN FRANCISCO
- 12 TORONTO
- 13 GENEVA
- 14 WASHINGTON
- 15 BRUSSELS
- 16 MILAN
- 17 STOCKHOLM
- 18 EDINBURGH
- 19 TOKYO
- 20 PRAGUE
- 21 HONG KONG
- 22 SINGAPORE
- 23 RIO DE JANEIRO
- 24 BEIJING
- 25 MEXICO CITY
- 26 MOSCOW
- 27 JOHANNESBURG
- 28 CAIRO
- 29 MUMBAI
- 30 LAGOS

2ND ANNUAL  
GUNN REPORT  
FOR MEDIA

MOST AWARDED ADVERTISERS  
IN 2005 FOR MEDIA  
INNOVATION AND CREATIVITY

Hewlett Packard  
Nike  
Adidas  
Ford  
General Motors

MOST AWARDED  
CAMPAIGNS IN 2005  
FOR MEDIA INNOVATION  
AND CREATIVITY

Hewlett-Packard's  
Virtual History  
and Adidas'  
Impossible Sprint

The Liechtenstein  
Museum's The  
Fresco Campaign

Hewlett-Packard's  
Hype Gallery

General Motors'  
Pontiac G6 Oprah

Nike's You Are Faster

Procter & Gamble's  
Rejoice's Sing and Dance

MOST AWARDED  
AGENCIES IN 2005 FOR  
MEDIA INNOVATION AND  
CREATIVITY

OMD  
Starcom MediaVest  
ZenithOptimedia  
Mediacom  
MindShare  
Mediaedge:cia

BURNETT POLLS BRITS ON  
"BEST CITY BRANDS IN THE WORLD"

- N E W Y O R K • 1
- S Y D N E Y • 2
- L O N D O N • 3
- B A R C E L O N A • 4
- P A R I S • 5
- R O M E • 6
- L A S V E G A S • 7
- L O S A N G E L E S • 8
- T O R O N T O • 9
- S A N F R A N C I S C O • 10

# melanie varley

CHIEF EXECUTIVE OFFICER,  
EUROPE, MIDDLE EAST & AFRICA  
MEDIAEDGE: CIA

*When you spend most of your time at 35,000 feet, you find the best way to live and work. My Mulberry bag is a perfect all-in-one. I can get my laptop and documents into the front pouch (no need for another case) and everything else inside. I've just replaced my old one (exactly the same)—and lucky I did—this model has been discontinued.*



## REVERSIBLE COAT

*I bought this Shearling coat in Spain, and it really does the trick wherever I go. It's short so no messing around with long coats. It's reversible so you can dress up or down, and it looks great anytime day or night.*



## VIRTUAL OFFICE

### Phone

*This isn't just an ordinary international cell phone. I use it as alarm clock, radio, and even a torch (perfect for finding the keys to your hire car or hotel room in the car park).*

### BlackBerry

*Can't remember how we managed without them.*

### 3G card

*My wireless office on the go. Anywhere, anytime.*



## GIRL'S KIT

### Hair clip

*Always in my bag. Comes in handy when you get off the plane and suddenly realize you're having a bad hair day.*

### Lipstick

*Three different shades of Chanel lipsticks, different colors for day and night.*

### Glasses

*My reading glasses and sunglasses fit in one pouch. If you're looking for good specs in a hurry, Copenhagen airport is a real find—€20 for good-looking, cheap, and practical reading glasses.*



## PLANE POWER

*Laptops invariably only last a couple of hours on battery so this plane adaptor allows me to "plug-n-play" in the air for as long as I want. Hoping for a handy travel size in the future.*



## MAGAZINES

*I read only two magazines: The Economist because it's the best news title when you don't have time to read a newspaper every day and Conde Nast Traveller because travel is my passion, and you need some inspiration to help decide how to spend those air miles.*

tell us what's in your bag. send submissions to [editorial@inter-national-ist.com](mailto:editorial@inter-national-ist.com).



LONDON

When Sir Martin Sorrell, chief executive, WPP Group, kicked off the IAA U.K. series of business lunches for 2006, he spoke to a full house. (All photo identifications from left.)

- 1 Thomas Pohl, Sony; Paul Gordon, Banner Corp.
- 2 Bruno Beltrami, Publieurope.
- 3 Jo North, Neil Holland, both Accenture; Dana Whitaker, Dow Jones; Simon Davies, Forbes.
- 4 Hamish Davies, Caroline Foster-Kenny, both Mediaedge:cia.
- 5 Kevin Razvi, CNN.
- 6 Stefanie Stroh-Begg, Jeannine Soeldner, both IGP; Mike Cuva, Mediaedge:cia.
- 7 Ann Allen, MEC Global; Michael Toedman, Businessweek.
- 8 Charlotte Moore, Andy Bush, both Fortune; Jane Sullivan, Mediaedge:cia.
- 9 Sarah Hazell, Grey Global; Name TK, Company .
- 10 Chris Pele Kanou, Guardian Newspapers; Paul Thomas, Mindshare.
- 11 Nadine Howarth, National Geographic.



SINGAPORE

Government and industry officials turned out in full force for four days of business and networking at AdAsia 2005. (All photo identifications from left.)

- 1 Eric Lynge, MediaCorp, and festival dancers.
- 2 Lim Chin Bang, Singapore Press Holdings; Junji Narita, Hakuodo; Deborah Malone, internationalist; Tomokazu Jimbo, Hakuodo; Eric Tang, AdAsia Organizing Committee.
- 3 Bharat Patel, Procter & Gamble India.
- 4 Shadi Bteddini, BE International; Hana Dang, Goldsun Advertising; Noriyuki Shutto, Dentsu.
- 5 Noriyuki Shutto, Dentsu.
- 6 Chris Graves, Ogilvy PR Worldwide.

DUBAI

Joseph Ghossoub (from left), The Holding Group, parent of group of WPP agencies in the Middle East, and IAA world president-elect, and Ahmad bin Byat, director general, Dubai Technology, hold a press conference about the 40th International Advertising Association World Congress that kicks off here March 20.



7 Marie Scotti, International Advertising Association; Indra Abidin, Fortune Indonesia, and festival dancers.

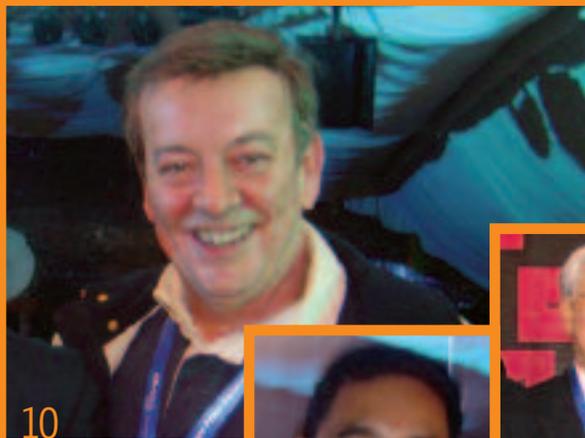
8 Byung Ki Sohn and Fun-Hyouk Ko, both Joon Ang Ilbo.

9 Takayuki Shimizu, IAA Japan; Fernando Mariano, Multimedia.

10 Eusebio Serrano, OJD Spain.

11 Mohie Patel, Khaleej Times.

12 Ko Matsumoto, Dentsu; Lee Boon Yang, Singapore Minister for Information, Communications, and the Arts; and Tateo Mataka, president-CEO, Dentsu.



SINGAPORE

Officials from Singapore's Ministry of Information, Communications & the Arts were on hand when CNBC launched its new state-of-the-art all digital newsroom in its Asia Pacific headquarters here. From left: Peter Juno, senior VP-director of operations, CNBC Asia Pacific; Minister Lee Boon Yang; Alexander P. Brown, CEO-CNBC Asia Pacific; Senior Parliamentary Secretary Yatiman Yusof; Senior Minister of State Balaji Sadasivan.

COMING EVENTS

OCTOBER 9-10  
5TH FIPP WORLDWIDE  
MAGAZINE MARKETPLACE

PLACE: Hilton Metropole,  
London

RESERVATIONS:

www.magazinemarketplace.com;  
claire@fipp.com

PRICE: Member £440.00 plus VAT;  
non-member £500 plus VAT

NOVEMBER 12-14  
3RD FIPP  
LATIN-IBERO-AMERICAN  
MAGAZINE CONFERENCE

PLACE: Grand Hyatt Hotel,  
São Paulo

RESERVATIONS:

mceliafurtado@aner.org.br  
Maria Célia Furtado

55-11-3030-9392

PRICE: NA

NOVEMBER 16

PR AWARDS

PLACE: Grand Hyatt,  
Hong Kong

RESERVATIONS: 852-3175 1913

PRICE: NA

DECEMBER 13  
MEDIA'S AGENCY OF THE YEAR  
AWARDS

PLACE: Grand Hyatt,  
Hong Kong

RESERVATIONS: 852-3175 1913

PRICE: NA

MAY 13-15 2007  
36TH FIPP  
WORLD MAGAZINE CONGRESS

PLACE: China World Hotel,  
Beijing

RESERVATIONS: Helen Bland  
helen@fipp.com

PRICE: NA



NEW YORK

At a luncheon meeting, Diego Scotti, VP-global advertising, American Express, spoke to International Advertising Association members about "Driving engagement in the new world of communications." (All photo identifications from left.)

- 1 *Woman (name to come), Mindshare; Penny Scott, Time; Dick Soule, Petry Television International.*
- 2 *Rik Gates, Businessweek; Diego Scotti, American Express.*
- 3 *Michael Monheim, Axel Springer; Percy Fahrback and Tim McCann, both CommPros USA.*
- 4 *Steve Howe and Tim Hart, both Financial Times; Larry Levy, LJL Associates.*
- 5 *Matthew DelRe and Jill Weinstein, both Discovery Networks International.*

SEOUL

Agency and client execs celebrate the opening of Diamond Ogilvy Group Korea, a new wholly-owned subsidiary of Ogilvy & Mather.

(from left): Miles Young, chairman, Ogilvy & Mather Asia Pacific and chairman, Diamond Ogilvy Group; Kyung Ho Kim, vp-Crown Confectionery.

(from left) Tim Oakes, president, Unilever Korea; Won-Chul Woo, president, Du Pont Korea; Shelly Lazarus, chairman-CEO, Ogilvy & Mather Worldwide.



**Helen C H A F F E Y** Singapore Grey Global Group Asia Pacific, Senior VP & Client Services Director



1992 LONDON Saatchi & Saatchi  
 1999 BRUSSELS/GENEVA Procter & Gamble  
 2003 LONDON TBWA  
 2005 SINGAPORE Grey Global Group Asia Pacific

**Monitz W U T T K E** Lausanne Publicitas Promotion Network and Emphasis Media, CEO Asia/Pacific (PPN) and CEO (Emphasis)



1998 LONDON EURO RSCG WNEK GOSPER  
 2001 LONDON AMV BBDO  
 2004 LONDON Lowe & Partners Worldwide  
 2006 LAUSANNE Publicitas Promotion Network and Emphasis Media

1994 BERLIN Pixelpark

1992 FRANKFURT Bosch-Telekom  
 1995 LAUSANNE Publigruppe

**Donald L A W R I E** Paris/Lyon EuroNews, Director of Worldwide Distribution



1998 LONDON Telewest Broadband/Eurobell

2004 LONDON Wanadoo UK

1995 LONDON MTV Networks Europe

2002 LONDON BSKyB

2005 PARIS/LYON EuroNews

**Michael C R A I G** London Metro International, Global Key Accounts Director



1992 LONDON The Daily Mail

1996 LONDON The Evening Standard

1994 LONDON The Times

2004 NEW YORK Metro International

2006 LONDON Metro International

**Yolanda A U S I N** Madrid Discovery Networks, Country Manager, Spain and Portugal



1989 MADRID Johnson & Johnson

1998 MADRID Vodaphone (formerly Airtel)

1999 MADRID Cosmopolitan Television Iberia

1993 MADRID Sanitas S.A. de Seguros

2006 MADRID Discovery Networks Latin America/Iberia

Every so often it's necessary to follow the raging advice of friends and visit a place outside your comfort zone. Baghdad isn't ready for you, and it's sticky in Dhaka, so may we suggest Beirut? It's a good way to get back in the swing of things. Peaceful elections and beautiful weather this time of year make Beirut an unsung hot spot, and trust us, you can never travel too far for a good shwarma!

**arrivals**

If at all possible, arrive with your Saudi sheik friend in the Gulfstream. This will vastly improve your chances of getting the VIP bottle service at an over-rated night club later on. You don't want to wait all day in baggage claim for your Louis Vuittons to fall off the belt. Failing that, just head straight to Sixt Rent-a-Car for the Mercedes SUV rental. You don't really want to drive in Beirut, but the countryside is so stunning you're eventually going to want to go for an adventure—either up to the mountains or down toward the beaches south of the city. You might as well at least look like a low-level Saudi in your inked-out Benz.

**your stay**

There are a few beautiful hotels in the center of Beirut, and located so close to the waters of the Mediterranean, you can't really go wrong by taking your chances. The key to the hotel scene is to make sure you can be seen, preferably sauntering right out to an adjacent beach. If you want "cultural old town," try a different city, Amman perhaps. Beirut is about beach proximity. The well informed choose either Le Vendome Intercontinental (great roof-top lounge views) or the Albergo, which has a cool little roof-top pool and a great general manager named Michel.

*The Albergo is all about cozy and feels like you've just entered your industrialist great-grandfather's private retreat kingdom.*

**LA VENDOME  
INTERCONTINENTAL**  
Ain El Mreisseh  
961-1-369-280  
**ALBERGO**  
137, Abdel Wahab El Inglizi St.  
961-1-339-797

**food and entertainment**

Beirut is a city for the soul, especially if your soul is connected to your stomach. Where else can you sit in a beach-side jacuzzi munching on a fennel-laced focaccia with a cedary wine? While local wine (which strangely can be recommended) does not taste of "hint of cedar," the idea seeps into the consciousness, casting a stately aroma in the mind as you swirl the red concoction across your tongue at sunset.

For lunch, pop into Abdel Wahab, home of Beirut's best chicken shwarma and a beautiful crowd stuffing their faces ever so delicately. Lunch can be at noon, night, or late night, depending on how late you were out last night. You could always surprise yourself and try Cactus for great Mexican food, not the first cuisine you would expect, but the local in-crowd swears by the fajitas.

**CACTUS**  
Gemmayze  
961-1-445-544

Two clubs in Beirut have achieved such legendary status they make Studio 54 look like a dry run. The only possible comparison to Crystal and B-018 might be Tramps in London or Les Caves du Roy in St. Tropez. You know the scene: lots of cheese and ladies who please. But despite all that, Crystal

why not check out Beirut's growing contemporary art scene and the hip little gallery Espace SD? The gallery promotes homegrown talent with an eye toward lesser known foreign artists but really shines with its weekly movie club that screens old and new Lebanese movies in a virtually private setting since hardly anyone goes. The movies are very cool if you don't take them seriously, and the space provides a great respite from the party-hearty atmosphere across the rest of the city.



Crystal is a nightclub in a class of its own.

remains the place to shake your money with rocking house and ambient groove all night long. Later, (like only after 4 a.m.) you can venture to B-018. The generation-z kids will have departed by then, leaving the harder core party-ers in charge.

Slightly more sophisticated and ever so fun are Music Hall and the Sky Bar, the latter at the top of the Palm Beach Hotel. It's a few minutes from the center, but everyone loves the LA-inspired bar setting, and it's the perfect place for sunset.

**culture**

Beirut is a city of nightlife, not cultural snobbery. That said,

**ESPACE SD**

S. Dagher Building  
Charles Helou Ave.  
961-1-563-114  
www.espacesd.com

If you pop into town during the summer, it's worth checking out the Byblos International Festival ([www.byblosfestival.org](http://www.byblosfestival.org)), in mid-July. It features the most random lineup in the world, including Rodger Hodgson, the lead singer from Supertramp, and the Armenian Philharmonic Orchestra. How about that lineup! Even though some claim Beirut is the "New York" nightlife capital of the Middle East, reality requires a wry sense of humor to enjoy it. ●