

Cassies 2005 Cases

Brand: Budweiser (Québec): 1994-2004

Winner: Sustained Success—Gold

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Crossover Notes: All winning cases contain lessons that cross over from one case to another. The notes for this case are as follows, and are attached. The full set can be downloaded from the Case Library section at www.cassies.ca

- Crossover Note 1. What a Brand Stands For.
- Crossover Note 2. Brand Truths.
- Crossover Note 7. Fighting for the Same High Ground
- Crossover Note 11. The Eureka Insight.
- Crossover Note 14. Refreshing a continuing campaign.

To see creative, go to the Case Library Index and click on the additional links beside the case.

EXECUTIVE SUMMARY

Business Results Period: 1994-2004.

Start of Advertising/Communications Effort: 1994.

Base Period for Comparison: Historical.

To say that the beer market is competitive is an understatement. In 1995, a year after this case history begins, Budweiser was battling with 99 different brands. Ten years later, consumers had 230 beers to choose from.

By 2004, when this story ends, Budweiser was the number one beer in Quebec. Young beer drinkers, Budweiser's target group, are notoriously fickle. So how did Budweiser keep its image hot and desirable over a ten-year period, and increase market share from 9% to 14%?

By steadfastly adhering to a Budweiser positioning unique in North America – the rock beer for the young. **Crossover Note 1.**

Tweaked and reinterpreted with the changing times, “Bud = Rock” has kept Bud sexy, successful and appealing for ten years.

SITUATION ANALYSIS

1981 - Made in USA

Budweiser entered the Quebec market in 1981, bringing with it its American heritage. Its mass media strategy capitalized on its social and party character. The first spots used the Buddy Holly “Rock around the clock” song.

1989 - The Rolling Stones Rock the Boat

Tactical activities involving rock music started. Budweiser sponsored the 1989 Rolling Stones concert, swelling its popularity enormously. Flushed with success, Budweiser staked out the “rock music for the young” positioning in the early 90s, capitalizing on its distinctive brand equity elements (fun, rock, party, sociable). It was at this point that rock music went from being a platform for tactical activities to becoming the heart and soul of the brand—anchoring a full range of integrated communication (advertising, promotions, sponsorships, events, point of sale advertising, internet).

1994-1998 - The Idea of “Bigness”

Bud had reached a share ceiling of 8%, and there was a feeling that the brand may be running out of steam. The agency's strategic team noticed that with each big rock event, there was a noticeable jump in market share. **Crossover Note 2.**

The message was clear: “bigness” was a key to long-term growth.

With the “Bud = King of Rock” campaign, Budweiser appropriated major rock icons and consolidated its positioning. Meanwhile, a panoply of new brands came onto the market, tempting consumers with wider and wider variety (higher alcohol beers, dry beers, etc).

1999-2002 - Rock Evolves

Rock culture evolved. The supergroups gave way to smaller groups of emerging stars. Bud developed a more grassroots approach: “bringing rock to consumers.” **Crossover Note 14**. On the marketplace side, malt liquors (flavoured beer-style beverages) broke into the market, offering consumers a new kind of added-value refreshment.

2003-2004 - The Rock Attitude.

Budweiser’s stature in rock was now entrenched, and the thinking evolved again—to a more consumer oriented expression of rock culture. The goal of the “Rock Attitude” campaign was to increase the consumer sense of belonging.

From 1994 to 2004, Budweiser grew to become the biggest selling beer in Quebec. Molson Dry tried on many occasions to invade Bud’s territory, but were never able to appropriate the rock music position. **Crossover Note 7**.

STRATEGY, INSIGHT & EXECUTION

Analysis of the Rolling Stone concert in 1989 led to an important insight: the target group didn’t turn to Bud simply because of its affiliation with things big, but because big name rock groups represent the outside world. Isolated by language, young Québécois needed to feel part of the sexy international rock culture. Associating with Budweiser, a big American beer, and the high-profile rock music it sponsored, gave them that feeling. Budweiser became their passport to the international rock scene. **Crossover Note 11**.

1994-1998 – Phase 1:

Inject the Brand with “Bigness”

This involved appropriating rock icons in mass media, to make “Budweiser = the King of Rock” with indomitable energy, show, and impact. We created events on scale never seen before in Quebec. Huge outdoor mega-shows on Île Notre-Dame brought 30,000 rock fans together, galvanizing them with a night of electrifying rock. Super sized rock icons became focal points, bringing “bigness” right down to points of sale.



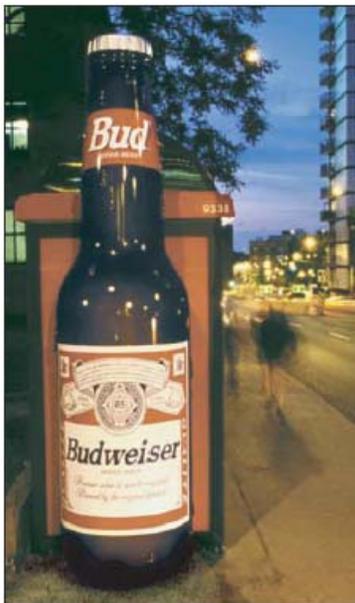
Essentials	Focus	Tactics	Description
Inject "bigness" into the brand	Bud = King of Rock	TV	Image spots capitalizing on the large scale of the brand and demonstrating Budweiser association and leadership in the arena of international rock shows
		Spectacular outdoor advertising	A spectacular 30-foot guitar. Painted buses. Lighted with sound systems. Mega structures incorporating live audio speakers
		Mega shows	Organization of a mega show on Île Notre-Dame
		Sponsorships	Rock concert sponsorships: Aerosmith, Styx, ZZ Top, Rolling Stones. Radio promos communicating rock sponsorships and free ticket draws
		Spectacular product displays	Beer-case puzzle in the shape of audio speakers



1999-2002 – Phase 2 : Bringing Rock Closer to the Consumer

By 1999, Budweiser was dominating the rock position. Sales were increasing, but certain image attributes suggested that association with legendary rock names risked aging the brand. So we adapted to the new scene, getting closer to emerging stars. This grassroots approach went right down to the corner grocery store. Promotions included exclusive shows in bars and access to coveted iconic rock music objects.

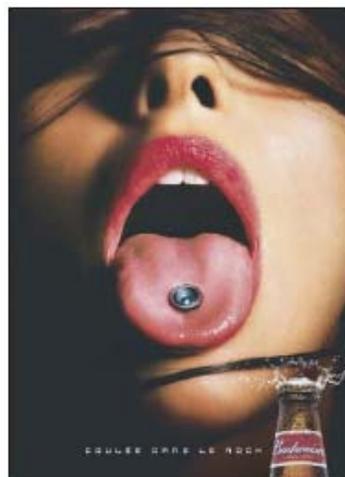
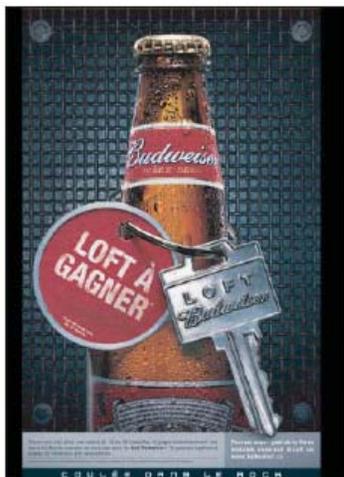
Essentials	Focus	Tactics	Description
A grassroots approach	Bud brings you rock	TV	Image spots demonstrating Bud's openness to the emerging rock culture, with Bud as the catalyst for new rock
		Bus Shelter	Broadcasting of continuous Musique Plus rock videos in bus shelters
		Spectacular product displays	Mega bottles with headsets, playing radio stations' top ten rock hits
		Sponsorships	Association with emerging rock groups: Our Lady Peace, Cranberries. Integrating the R.O.C.K. platform: Budweiser brings you rock
		Promotions	Access ROCK. Budweiser gives fans access to otherwise inaccessible rock objects



2003-2004 - Phase 3 – Let Consumers Express their Rock Attitude

“Budweiser = Rock” was now entrenched to the point of being incontrovertible. We now evolved the strategy again. Rather than show literal rock, we captured the “rock attitude” in our target. This reinforced feelings of belonging to the international rock culture.

Essentials	Focus	Tactics	Description
Win consumer endorsement	<i>The Rock Attitude</i>	TV	<ul style="list-style-type: none"> • A mariachi band guy turns into a rock star at the sight of a Bud • A fan meets his concert buddies – they are all wearing cervical collars • A body surfer comes up with his own means of transportation • Fans ready to do anything to get tickets
		Promotion	<p>The Budweiser Loft A unique place to express rock attitude POS and radio promotions for the chance to win weekend passes to the loft</p>
		Posters	A series, depicting consumers who are rockers to the core (<i>rock dans la peau</i>).



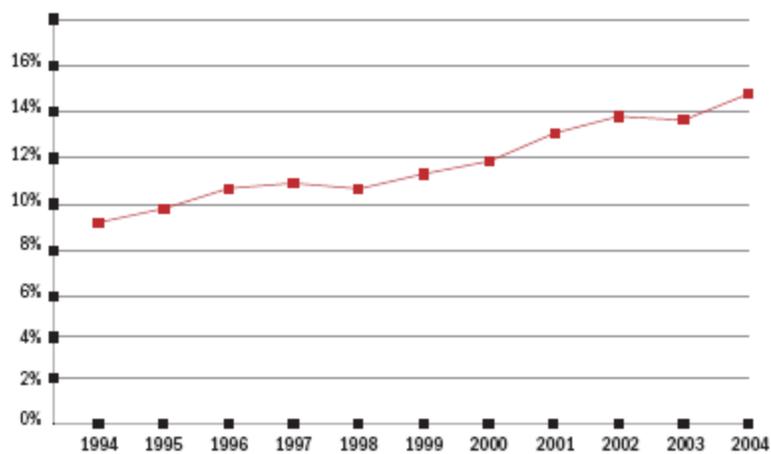
RESULTS

Across the entire Results Period, competition was intensifying, as shown by the table:

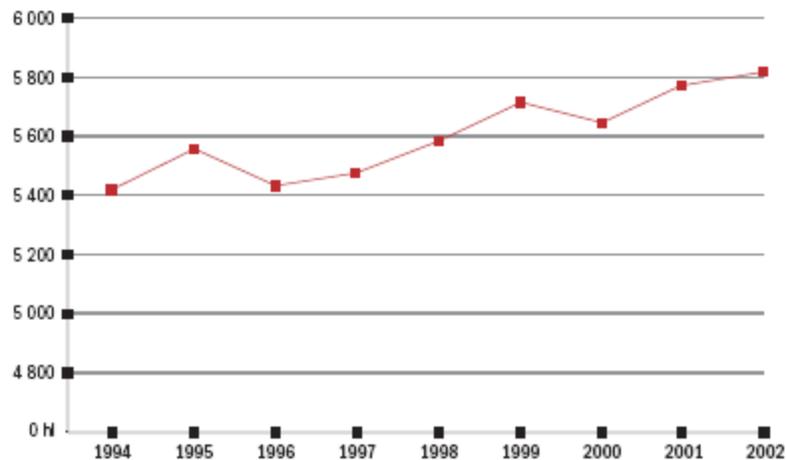
	1995	2002
Number of breweries	17	29
Number of brands	99	230

Even so, Budweiser saw its market share rise from 9% in 1994 to 14% in 2004. This was in a market that was increasing gradually—so the volume effect was even greater.

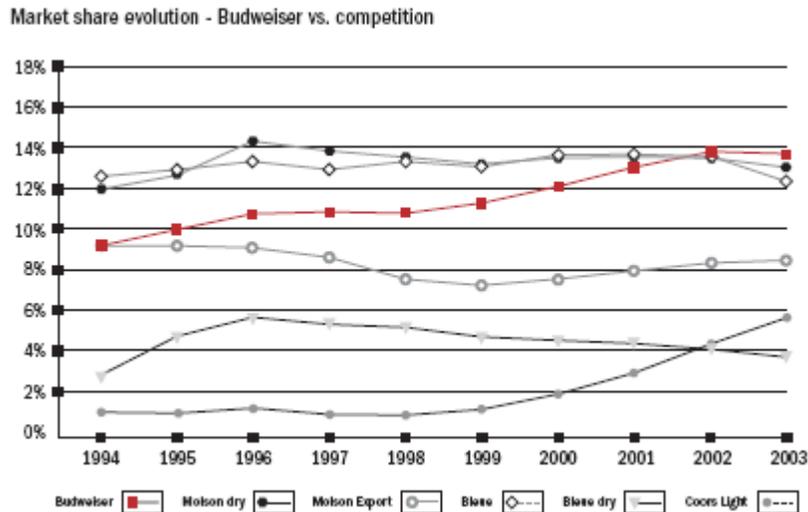
Budweiser market share



Total industry volume evolution



It took close to ten years, but Budweiser eventually took over as #1 from Molson Dry and Labatt Bleue:



CAUSE & EFFECT BETWEEN ADVERTISING AND RESULTS

Over this ten-year period, there were no significant marketing differences except for advertising.

The price of Budweiser was the same in relation to its category. And Bud did not change its basic packaging or product formula.

So How Can Budweiser's Success be Explained? By uncompromising adherence to the rock positioning. Updated as times required, Bud has stayed fresh, innovative, sexy and appealing, but always totally rock and roll.

As Neil Young said, "Rock and roll can never die."

End of Case. Crossover Notes follow.

INTRODUCTION TO CROSSOVER NOTES — CASSIES 2005

[For Budweiser Quebec]

Crossover Notes have been going for several years, and now run to 28 pages.

We used to attach a full set to all cases, but to save a few trees, we now include only the Notes particular to any case.

The idea of Crossover Notes occurred to me while I was editing Cassies 1997.

I was a consultant by then. Before that I had reached the category manager level at P&G (what they quaintly called the Associate Advertising Manager). I had then clambered up the ladder at O&M, eventually becoming President and later Vice Chairman—both in Toronto. P&G and O&M were both passionate about “lessons learned,” and so was I. In those days (it seems hard to believe now) we felt rushed off our feet. But we did have time to study if campaigns were working or not, and come to conclusions about why.

There are lessons, like gold dust, in all the Cassies cases. So in 1997 I decided to extract them. This started with bite-sized footnotes about lessons that “cross over” from one case to another. And the idea kept growing. It is still anchored to winning cases, but I also draw on other thinking for more complex issues.

You can use Crossover Notes in two ways. Although they didn’t start out as a crash course in advertising, they are worth reading as a whole. You can also dip into them selectively. The headings on the next page will help you choose.

I’ve tried to be even-handed on controversial issues, but here and there you will sense my point of view. For this I thank the Cassies for not editing their Editor.

We now have over 150 published cases. They’re a growing body of experience. I hope I’ve helped pass some of the learning on.

David Rutherford

Toronto: December 2005.

For advice on brand-building see Excellence in Brand Communication—authored by leading Canadians from across the marketing and advertising spectrum.

It is published by the ICA. See www.ica.adbeast.com.

INDEX OF CROSSOVER NOTES FOR CASSIES 2005

All Cases	Budweiser Quebec
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2. Brand Truths.	✓
3. Core Equity versus Price & Promotion.	
4. Business Strategy dictated by the Brand Positioning.	
5. The Total Brand Experience.	
6. Should the product be improved?	
7. Fighting for the Same High Ground.	✓
8. Classic Rivalries.	
9. Turnarounds.	
10. Conventional Wisdom—should it be challenged?	
11. The Eureka Insight.	✓
12. Changing the Goalposts.	
13. Immediate vs. Long-Term Effect.	
14. Refreshing a continuing campaign.	✓
15. Baby with the Bathwater.	
16. When a campaign stumbles.	
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18. Keeping it Simple.	
19. Great minds think alike.	
20. Emotional versus Rational.	
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34. Longer and Broader Effects, and A Closing Thought.	

The Notes for this case are marked ✓ and come next.

BUDWEISER QUEBEC. CROSSOVER NOTES. CASSIES 2005.

1. **What a Brand Stands For.** People in real life hardly give the deeper meaning of brands a second thought. They know that some appeal more than others. They may have a sense that brands jostle for their attention. But that's about it. They certainly don't agonize over what is the essence of this, or the abiding truth of that.

But branding goes deeper than we in marketing may realize. Before marketing was even thought of, branding was part of life. Everything from national flags, to coinage, to the uniforms on soldiers, boy scouts and Supreme Court judges, to the plumage on peacocks (human and otherwise), is a form of branding. Business had an early example in the 1800s when Harley Procter of P&G heard a pastor quote a biblical text about ivory palaces. Goodbye Procter & Gamble White Soap. Hello Ivory. More recently, Tom Peters published *A Brand Called You*. And Tony Blair tried to re-brand the UK as "Cool Britannia."

A brand, in the fullest sense, is hard to define. Dictionary definitions tend to focus on the trademark aspect, and yes, branding does involve some sort of identifying mark. But this misses the point. What makes a brand valuable?

The answer is The Advantage of Belief.¹ Charles Revson of Revlon famously said, "In the factory we make cosmetics. In the store we sell hope." In other words, a brand is not a product; it's what people believe about a product. These beliefs can be immensely powerful. The most astonishing is the placebo effect. In clinical trials, many patients respond to the "sugar pill," even when they have serious diseases. We see the same thing with blind and identified product tests. With a strong brand, the preference jumps. (See *What's in a Name* by John Philip Jones.) And when the Advantage of Belief takes hold, it leads to a long list of benefits:

- | | |
|-----------------------------------|---|
| a) Customer loyalty | e) Facilitating brand extensions |
| b) Higher price | f) Withstanding competitive attack |
| c) Higher cash flows | g) Motivating staff and attracting new talent |
| d) Higher long-term profitability | h) Potentially augmenting the stock price |

This doesn't, of course, answer the question, "how do you build these beliefs?" There are widely varying notions, but most agree on the basic principles: (1) stake out what the brand can and should stand for (2) stick with this over time (3) evolve to account for lessons learned and market changes.²

This can't be done by empty promises. We have to assess what consumers want against what the product delivers—and tell the story better than competitors do. We have a melting pot of perceptions and reality to work with. All the "brand" ideas are there to help—Brand Image, Equity, Personality, Character, Essence, Relationship, Footprint, Truth, Soul, Identity, and so on—along with old faithfuls like Positioning, Focus of Sale, USP, Features, Attributes, Benefits and Values. Whatever the terminology, though, "what the brand stands for" is critical.

¹ This is a phrase of mine, though the idea that a brand is "more" has been described by many authors.

² How do you do this, and evolve? See *Excellence in Brand Communication*: www.ica.adbeast.com

- 2. Brand Truths.** Successful advertising (in fact all successful communication) resonates with its audience. As a marketer, you may want people to believe that you have the best-tasting coffee, but simply saying, “I have the best-tasting coffee” will not usually get the resonance you need. One school of thought is to say the obvious as loudly and crassly as you can. We could call it the Bad Boy syndrome. Another has led to the idea of Brand Truths. These operate on a deeper level than simple claims. One of the top UK agencies described it as “we interrogate the product until it confesses its strength.”

I was once the Brand Manager on Tide, and when we were asked, “What does Tide stand for” we said, “Superior cleaning. Not whitening. Not Brightening. Not Fabric Care. Superior *cleaning*.”³

Superior cleaning was the religion on Tide, and Tide delivered, despite the cliché that all detergents are alike. But this was only a glimmer of the Brand Truth. If you “interrogated” Tide the most startling truth was the *intense belief* of Tide users. This came to life in the immensely successful “Two for One Swap” campaign. Hidden cameras watched as women who had just bought Tide were offered two boxes of another detergent in exchange. They adamantly refused, delivering off-the-cuff endorsements that no copywriter could ever have come up with. The campaign ran for years, and only came to an end because of its success—women knew it so well that the “candid camera” interview became impossible. Many Brand Truths are also insights, and for a list see [11. The Eureka Insight](#) and [12. Changing the Goalposts](#).

- 7. Fighting for the Same High Ground.** Some people feel that a brand should not fight for high ground already held by a competitor. It comes out as “our positioning has to be unique.” This sounds so right, how can it be wrong? Consider Cassies III. Lever wanted to pre-empt the arrival of P&G’s Oil of Olay bar from the US, and decided to kick-start Dove sales via new advertising. They had a spectacular product demonstration. Dove is not a soap, and when it is subjected to litmus paper, the colour does not change. With soaps—including Ivory—the paper turns an ugly blue. But this is essentially a mildness demonstration, and Ivory owned mildness. Some heavy hitters in international management (at the client and agency) predicted disaster if Dove took on Ivory. But Dove attacked anyway. At the start of the case, Dove and Ivory had the same dollar share. Four years later Dove’s dollar sales were up 73%, and Ivory had dropped to half of Dove’s dollar share.

And how do you decide whether to attack or not? On winnability. Yes, Ivory held the mildness position, but with “litmus” Dove had a superb claim on that territory.

The key is how you think about distinctiveness. It does *not* have to come from positioning. Consider Duracell and Energizer. Duracell was the first brand to stake out “lasts longer,” and Energizer (believing they could not attack this high ground) languished in other territory for years. Eventually they decided to attack, and the Energizer Bunny has been going and going ever since. Both brands have the high ground positioning. They get their distinctiveness from execution.

³ P&G defined “what the brand stands for” by a document they called The Creative Strategy. In those days, if anyone even dreamt that the Tide Creative Strategy should include whitening, brightening etc. it was seen as an offence against all that was holy.

One last variation on this theme. Sunlight wanted to attack Tide on cleaning, but decided that a frontal assault on such a powerful brand would fail. They still attacked, however, but they re-defined “clean” as the joy of getting dirty. This brilliant insight helped them win the Grand Prix in Cassies 99.

I’m not saying you should always attack a competitor on the high ground. There are many Cassies successes based on side-stepping or re-defining the high ground. Cottonelle, Desjardins, Gaz Metro and Réno Dépôt did this in Cassies 2004. Cruisin’ to Win, Crescendo, Whiskas, Twix, Moores and Lotto 6/49 did this in Cassies 2005. Even so, I think the high ground is still one of the first places you should look.

11. The Eureka Insight. These feature in many cases. Some examples:

- Oh Henry! None of the gut-fillers had tried to own hunger, even though it was the high ground for the category. Cassies II. See also *Crossover Note 7*.
- Buckley’s. Rather than side-step their bad taste, Buckley’s relished it. Cassies III.
- Chrysler. Minivans were “my most expensive household appliance.” Even so, *emotion* was the key to an immensely successful launch. Cassies III.
- Philadelphia Cream Cheese. In research, people often do not own up to what they really want, which in this case was “permission to indulge.” Cassies III.
- Richmond Savings. Almost everyone hated banks, but it still took insight to turn this into the “Humungous Bank.” Cassies III.
- Eggs are natural, but in word-association tests, consumers did not say so. (See *12. Changing the Goalposts*.) The farmer campaign brought “natural” to life.
- Sunlight. Getting dirty is fun. This is diametrically opposed to the conventional wisdom, dominated by Tide, that clean is good and dirt is bad. Cassies 99.
- Fido in Cassies 99. In an echo of Apple vs. IBM, Fido saw that consumers needed the human touch. See also Clearnet and “the future is friendly” in Cassies 2001.
- Diet Pepsi in Cassies 2002. They found a way to be youthful without being too young in the “forever young” campaign.
- Listerine in Cassies 2002: healthy gums, after a century talking about bad breath.
- Pro•Line in Cassies 2002: Appealed to non-experts with “Anyone can win.”
- Aero. Saw the power of “melting” in Cassies 2003.
- Crown Diamond. Used the fact that men hate to paint in Cassies 2003.
- Super 7. Ignored the political correctness of being tasteful. Cassies 2003.
- Cottonelle. Talked to women as women, not as “family.” Cassies 2004.
- Quebec Milk. Saw the blindingly obvious. That just asking people to drink more milk might cause it. Cassies 2004.
- Toyota Sienna. Realized that the answer lay not in what minivan buyers do, but in what SUV buyers do. Cassies 2004.
- Irving’s Cruisin’ to Win. Saw the power of *small* prizes. Cassies 2005.
- Crescendo. Like Oh Henry! saw unoccupied high ground. Cassies 2005.
- Butter. Saw a way to use “natural” to connote taste and health. Cassies 2005.
- Anti-Smoking. Saw the power of “Stupid.” Cassies 2005.
- Jergens Ultra Care. Saw a way to reposition skin. Cassies 2005.
- Whiskas saw things from the *cat’s* point of view. Cassies 2005.
- Moores used the fact that their target audience hates shopping. Cassies 2005.

- Harvey's realized the significance of The Grill.
- Quebec Lotto 6/49. If 6/49 winners are so generous, be nice to them.
- United Way saw power in the Hand icon.
- Leucan realized that there is still hope, despite childhood cancer.
- CIBC Run for the Cure saw the power in the Pinnie idea.
- Juicy Fruit saw how to build a new image by (almost literally) destroying the old one.
- Quebec Milk saw power in the obvious—if one glass is good, two are better.
- Plus virtually all the cases in *Crossover Note 10*.

14. Refreshing a continuing campaign. When I was at P&G and O&M, all the big advertisers and their agencies thought in terms of campaigns. If you presented new advertising, and got the comment “that’s just a one-off,” it was the kiss of death. In those days, a campaign was usually defined by television. There would be one commercial, or a pool, refreshed over time. Nowadays, a campaign is more complicated. But it’s fair to say that we (clients and agencies) still believe that campaigns are the right/best way to build a brand.⁴

Recently, the idea of “the brand relationship” has taken hold. This is the notion that we treat brands like friends. Brand Truths can come out of this type of thinking, as can other insights. Relationships can be very different, but for most people, the good ones are based on things like trust and consistency, though not dullness and predictability. This has led to the idea that brands should present a consistent face over time (assuming, of course, that they are standing for the right thing.)

There is still the question, though, of what is a campaign? At one time, packaged goods advertisers (and some agencies) believed in strict pool-outs. But campaigns don’t have to be so formatted. The following list doesn’t pretend to be exhaustive (some campaigns don’t lend themselves to being categorized) but it starts at rigid end of the spectrum, and extends to the holistic. All versions have their successes and failures, and I hope this will help free up some of the rigid thinking:

- **Strict Pool-Out.** Campaigns like “Who wants Gum? I do. I do.” There is a repeated format, often with a USP demo or slogan. Some people think this type of advertising is passé. Others remember it fondly.
- **Hall of Fame Pool-Out.** Some think pool outs are dull, predictable and clichéd. Not necessarily. The 20-odd year campaign for Hamlet cigars in the UK is rigidly formatted, but spectacularly creative and effective. Familiprix is the same.
- **Situational Pool-Out.** These don’t have the format of the strict pool out but still have a clear connection between executions. Diet Pepsi’s “Forever Young” and Pro•Line’s “Anyone can Win” are examples. Huggies “Happy Baby” is one of the longest-running. Clearnet/Telus is in this camp too.

This category also includes spectacular executions like “Manhattan Landing” and “Face” for British Airways, though it can be hard to keep coming up with ideas this big. Kit Kat is a different type of example, where the “break” continues, and the challenge is to keep it up to date.

⁴ A young creative friend said to me, “where does the belief in campaigns come from? Young people want constant change. What’s wrong with a stream of one-off ideas?” This would have been heresy at one time, and perhaps still is. But it’s food for thought.

- **Icons.** These can anchor a campaign (Maytag Man, Marlboro Cowboy) or be a property (Tony the Tiger, Pillsbury Doughboy). Some see icons as a yesterday idea, but I think that's a mis-call. Absolut Vodka uses its bottle as an icon, and it's brilliant. The Familiprix pharmacist is hilariously effective.
- **Spokes-people, and Spokes-animals.** Dave Thomas and Colonel Sanders, god rest their souls, are examples, as is Morty the Bison for Manitoba Telecom.
- **Storytelling with continuing character(s).** The Oxo family in the UK is a long-running examples. Bartles and Jaymes was a wonderful success story in the US. Personalities have been very successful in Quebec e.g. the Pepsi and Listerine Grand Prix winners in Cassies I and II.
- **Music-Based.** Music sometimes goes beyond a supporting role, and becomes part of the brand character. Soft Drinks, Cars, Fast Food, and Beer have all built campaigns this way. In packaged goods, becel's "young at heart" campaign would be an example.
- **Consistent "Voice and Attitude."** These campaigns are held together by something more subtle. Perhaps the most impressive was Volkswagen in the 60s. Individual executions were different (serious, comical, ironic, dramatic) but they all had the Volkswagen voice and attitude. Brands like Nike are in this category. Benneton is an extreme example.
- **Same core message. Customized execution.** To people with a strict "pool-out" mindset, this hardly qualifies at all. But the overall effect can be very powerful. The best Cassies example is the 4-year Dove Case from Cassies III.⁵

The campaign started in late 91 with "Litmus," a strikingly simple demonstration, with no people or voice over—just haunting music, and some supers. Then came a raucous candid-camera commercial of focus group women doing the litmus test for themselves. Then a talking-head scientist who invented Dove. Then another demonstration—similar in style to "Litmus," with the haunting music again.

The first three executions are so different that some people would not have approved them. Given the subsequent results, that would have been a pity. What holds it all together? The continuing promise of mildness. A scrupulously honest and consistent brand character. And an element of surprise in each execution. Note, though, that there are no continuing slogans or visual icons.

More generally, It's an open question whether today's obsessively short-term attitude is causing us to lose the drive we once had for great campaigns. I hope it isn't.

End of Budweiser Quebec Crossover Notes.

⁵ This case is another example. The 10-year campaign has always been centred on rock 'n roll, but it has always evolved.