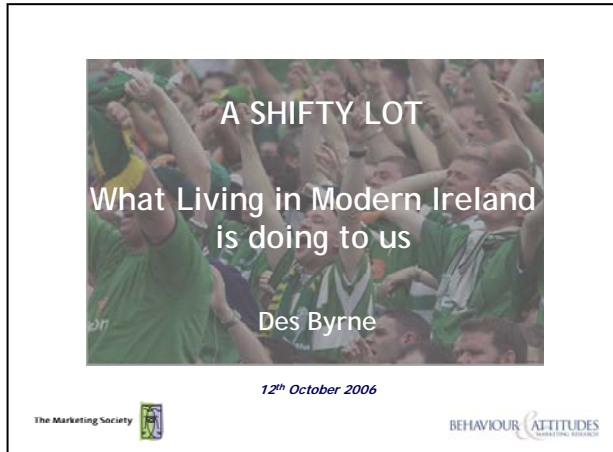


# A SHIFTY LOT

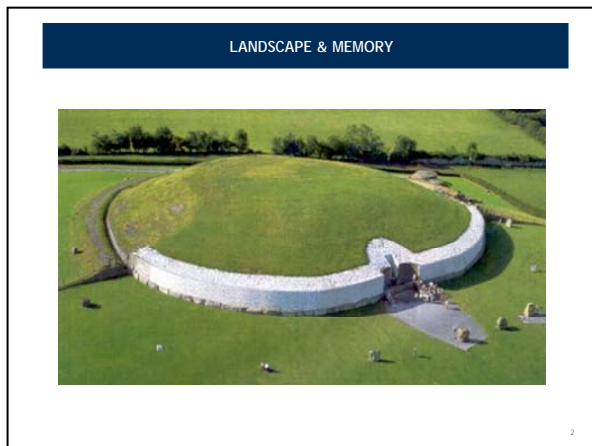
*Des Byrne*



This talk was given on Thursday, October 12<sup>th</sup> 2006, at The Royal College of Physicians Kildare Street Dublin.



Isn't this a wonderful building. It makes such a statement about the people who built it: Their sense of themselves, their ambitions for the future and so on.



Each generation leaves its particular mark on the landscape. This particular mark – Newgrange was built about 5,000 years ago.

We leave our mark on the landscape but, as Simon Schama pointed out in his book *Landscape and Memory*, the landscape leaves its mark on us also.

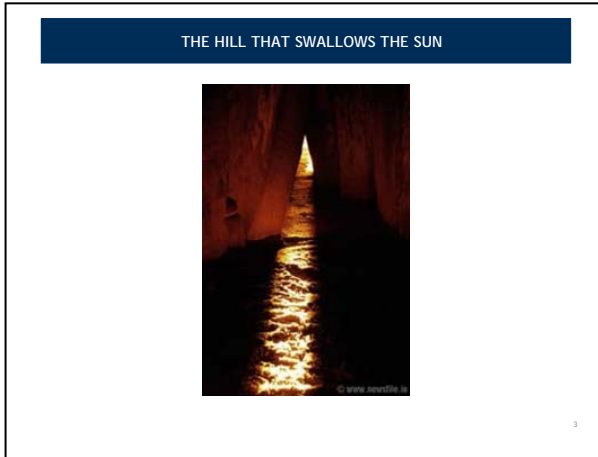
The Irish psyche has undoubtedly been strongly influenced by the particular character of the Irish countryside, the fact that we are an island, our prevailing weather conditions, the long winter

evenings and so on.

Some influences are even more subtle than that however. For a great deal of its history, Newgrange lay forgotten. It had become overgrown and might have been mistaken for any other grassy mound.

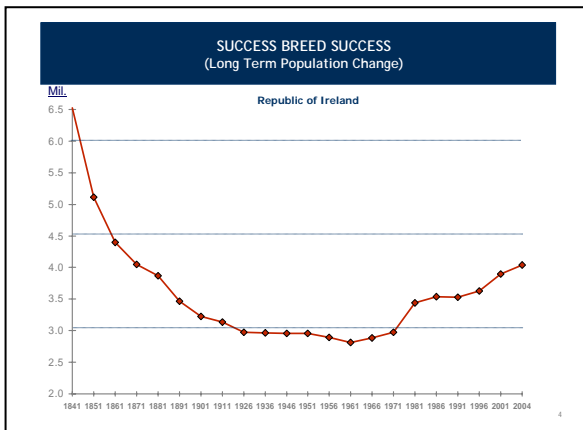
It wasn't until 1699 that the site was rediscovered when the then owner of the land asked his workmen to remove some stones for a building project he had in mind. They rediscovered the entry point to the monument and excavations began.

The early excavators questioned the locals about this particular mound. They discovered that it was known locally as "the hill that swallows the sun".



It took more than 200 years to rediscover, and prove, the origins of this particular piece of folklore.

This cultural artefact had survived in the folk memory, over a period of 5,000 years, without the benefit of any written record, or at least any written record that people could still interpret. Our culture, like our landscape leaves its mark on us.

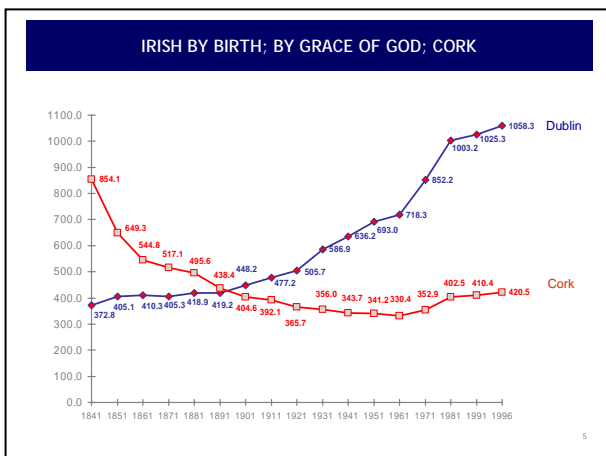


Other factors leave their mark also. Simple things like how many of us are living on this island.

There can be few people who would doubt that the Irish psyche suffered a cruel blow as a result of the great famine and its after effects. Our national self-esteem must have been dented by the long population decline that followed. But look what has happened recently.

There has been a steady uplift in the population of this country since the mid-

1960s. That simple fact has been the genesis of the Celtic Tiger phenomenon.



Hidden beneath the national population figure there are other stories waiting to be rediscovered.

When doing some work for the Irish Examiner some years ago, I was very struck by how deep-seated is the Cork conviction of being “the real Capital of Ireland”. Visitors to this country may be inclined to dismiss this as another case of second City syndrome.

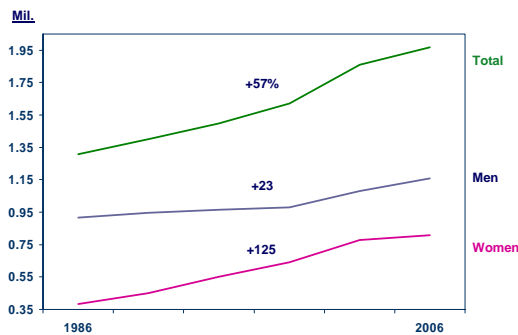
It runs much deeper than that. Today, the population of Dublin City and Country is two and half times that of

Cork. It wasn't always so, as can be seen in this chart. If you go back far enough in time, the reverse pattern was true. The population of Cork was substantially bigger than that of Dublin. Even as recently as the founding of the State, the two areas had roughly the same size populations.

## UNDERSTANDING MODERN IRELAND

Those of us who watch football on RTE are very familiar with John Giles expression “goals change games”. We think – “Oh come on John, that’s a cliché” the problem with clichés is that they tend to be true: that’s what gave them their power in the first place. Goals do change games and what I would like to do in the next few minutes is to describe the goals that have changed the game that we have been involved in, in this country over the past 20 years.

### LABOUR FORCE INCREASES 1986 - 2006



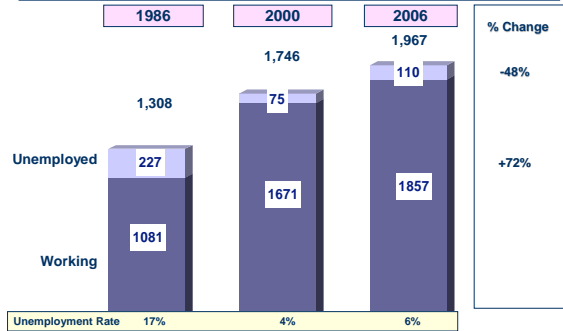
One of the big things in the past 20 years is that the total work force in Ireland has increased by nearly 60%.

It is an amazing stat and of course the big change has been in the number of working women. The number of women working in the population has more than doubled in that period of time.

However, I would ask you to notice the little kink toward the end of the line. We are starting to come to the end of that particular phenomenon. It is starting to slow down but I will come

back to that a little bit later on. The consequence of that shift is that there have been dramatic changes of gender roles.

### GROWTH IN THE NUMBER OF PEOPLE WORKING 1986 - 2003

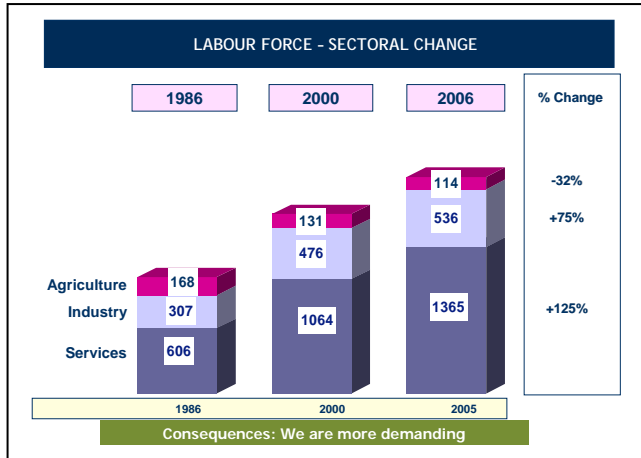


The labour force has increased dramatically but that is not much use if the jobs aren’t there to cope. In fact the number of people working in the country has grown by nearly  $\frac{3}{4}$  in the last twenty years. The proportion of people who are unemployed has dramatically decreased but again if you look at the figures for 2006 as compared to 2000 you will see that there is a little bit of a kink.

The number in the unemployed bracket, (despite all the good news) is starting to go up, so when we see

people getting anxious as they are, that is one of the reasons for it.

The big consequence though is that people are much more time pressed than they ever were before and we all know the knock-on effects from that.

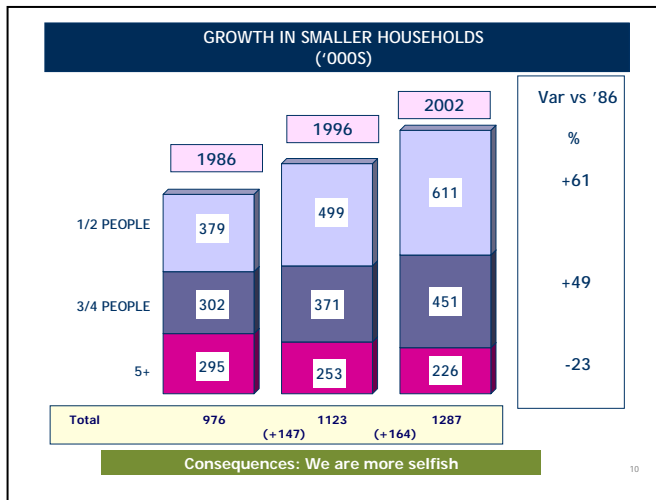


If you take the types of things that we do for a living, the number of people working in farming has diminished by a third over the last 20 years. The number of people in industry has increased by about three quarters and the number of people in service industries has more than doubled over that period of time.

If you like to look at it another way, the number of people working in service industries today is about a third higher than the total work force was, 20 years ago.

Of course working in service industries, creates particular pressures, and it creates a particular mind set. Most of the people working in service industries have been drilled through courses about putting the customer first and that kind of thing.

The consequence is that it we are more demanding. If you work in the kind of job where you recognise that you are going to be put to the pin of your collar to respond to client demands, you are going to expect the same in return.



Another major change has been the growth in the importance of small households. We have traditionally been a nation of large families, in poor times.

The number of people living in households with five or more people has diminished by a quarter. I have just been doing family searches myself and I was looking for my grandfather's records. I found they were from the City Centre. I didn't find his records but I found that in a house nearby, in 1911, there were 13 families or 68 people, living in a single house.

There are consequences of that. If you are living in a small household, if you just have a small number of kids, those kids develop a particular view of the world. If you are in a large family, you share clothes with other people, you share bedrooms, all this sort of thing, Small family – you are treated differently, you are treated like a little prince or princess.

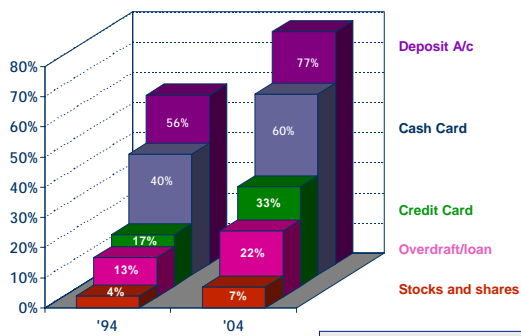
The consequence of that is we are becoming more selfish, we have more airs and graces – as my mother-in-law used to say “that fellow is smelling himself”.

## REAPING THE BENEFITS

With that kind of growth in the number of working people – you don't have to be a genius to work out that this means there is more money to go around. There is more money to pay the bills and so on and we have been reaping the benefits. Any analysis you might do, shows that.

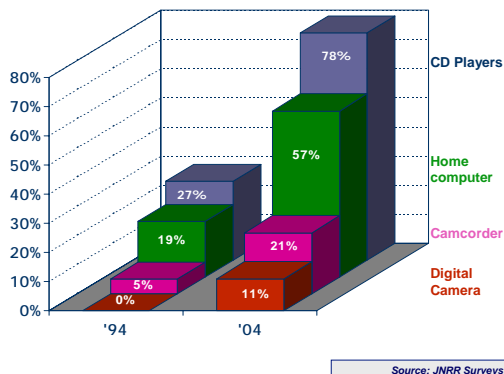
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### FINANCIAL HOLDINGS



These data are drawn from the Joint National Readership Surveys on financial holdings. Just look at it over a 10 year period, from '94 to 2004; huge increases. Even something like stocks and shares; which it is only up from 4 to 7% for that period of time, but that is a doubling.

### HOME ENTERTAINMENT



If you take things like home entertainment - huge increases. So we have been reaping the benefits.

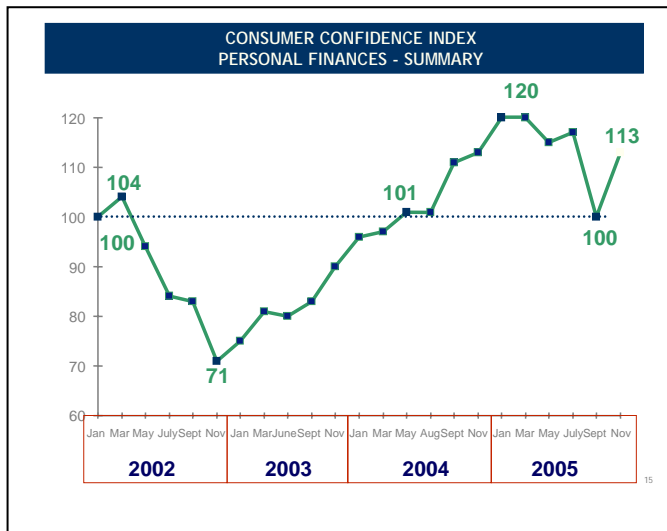
## The Tipping Point



- April 2002 Euro Entry -

But there was a tipping point in this story of well-being, which I would pinpoint to April 2002 when we joined the Euro.

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Over the last number of years, in B&A, we have been tracking consumer confidence. Things were going very nicely, thank you very much, up to March 2002. We went into the Euro in April 2002 and you can see straight away what the impact was.

There are a whole lot of reasons for this. We started to see ads for items in Northern Ireland that were in pounds sterling. We started to see ads down here that were in Euro and you said "Jesus we are being ripped off - hello rip off Ireland".

You went away to Spain or to Portugal on holidays and you were going to countries where things were at the very cheapest levels and making comparisons.

So we ran into that and it took a long time to recover. It is an interesting comment on the power of the media (and the power of media commentary) – do you see the dip there in September of 2005, that was Eddie Hobbs TV programme, and it was just reminding us of the horrors that we had gone through before.

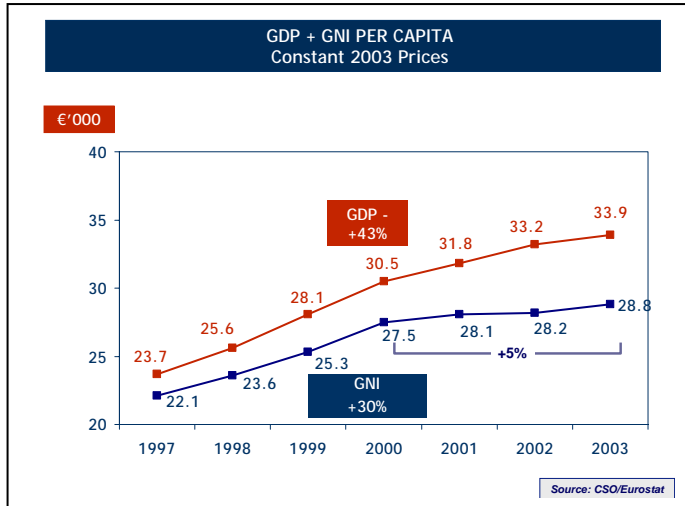
## After the Tipping Point



*"We began to notice the less good news"*

So after that tipping point we started to notice some of the things that were not such good news.

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Our GDP per head has been doing very nicely; 1997 to 2003 growth of about 43%. However, quite a lot of that growth, and Ireland and Luxembourg are the only two countries in Europe where this matters – comes from the difference between Gross Domestic Product and Gross National Income, because of the amount of money that is taken out by foreign national companies.

If you take our Gross National Income per head (which is a better indicator of our domestic

wealth), the increase was 30% over that time span. Again, the kink; if you look between 2000 and 2003 only one sixth of the increase occurred in that period of time. Five sixties of the growth came in the first half of this time span.

So we were suddenly faced with a downturn in what we were becoming used to, as our God given right to get wealthier and wealthier.

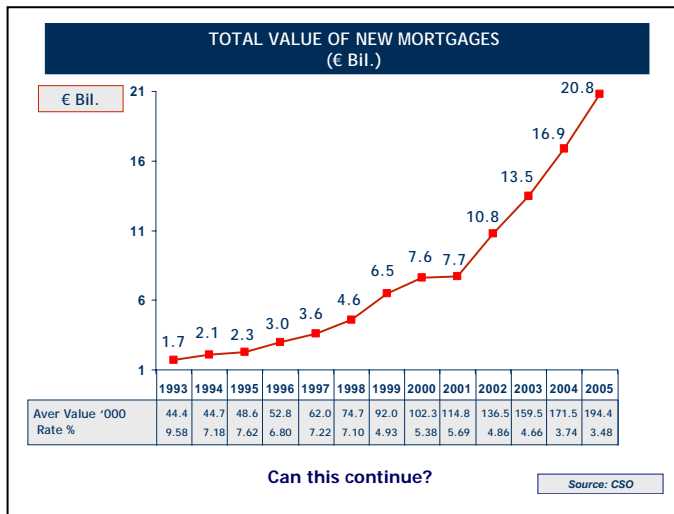
**CONSUMER FOCUS**  
*"We have retained our loyalty to big-ticket purchases"*

Even if we must make savings in other areas.  
Because we have convinced ourselves that "we are worth it".

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Of course we were addicts at this stage. We found it difficult to step off. We had become addicted to nice homes, big motor cars, foreign holidays, holiday homes abroad. I heard George Hook the other evening say that a third of Irish people are supposed to have holiday homes abroad at this stage. I find that hard to believe, but it must be bloody high.

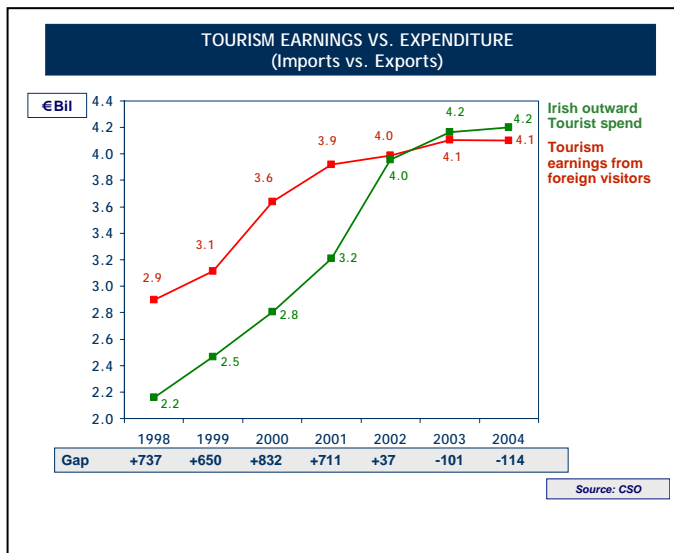
We have to go for these big ticket items because we have become used to them, even if we have to make savings in other areas.



When I say these are big ticket items, they really are big ticket items. Here is an example. In 1994 the amount of money going out in new mortgages in Ireland was 2.1 billion euro. By 2005 it was 21 billion euro. (The decimal point had moved).

Now some of that is obviously from people buying second homes and that kind of thing, but a large proportion of it is for people who are buying their first home and those people are "concertinaed" into a particular segment of the population. They are young marrieds, starting out in

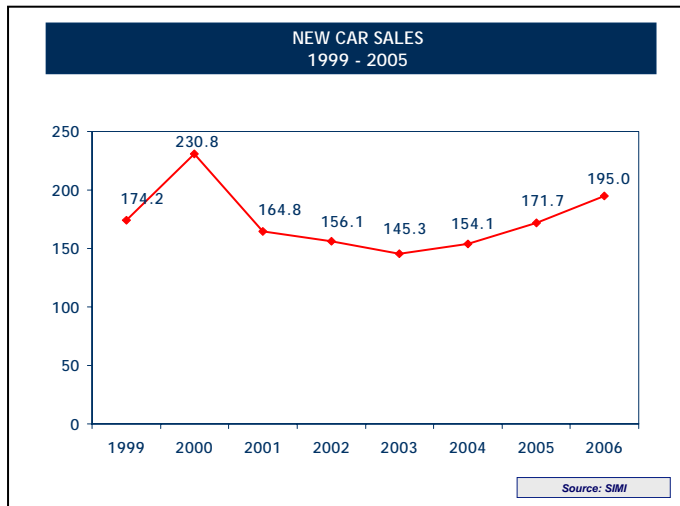
life and they are feeling the pinch - by God, they are feeling the pinch.



Here is another index. I was brought up in a world where Ireland was seen as a very big tourist destination and we had terrific earnings from tourists coming from overseas. That was the case up to relatively recently.

But by 2002 the amount of money that Irish people were spending overseas came to equal the amount of money that foreign visitors were spending in Ireland and in the last few years it has gone the other way. Irish people are spending more money abroad than foreign visitors are spending in Ireland and the reasons for that, of course, are obvious.

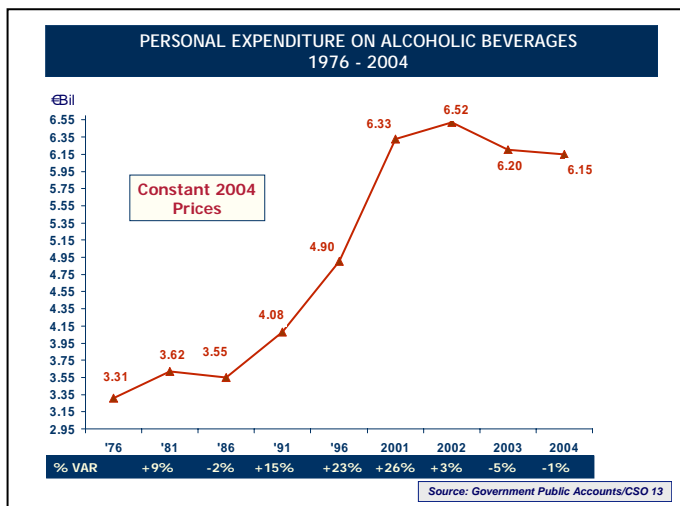
If you are buying a holiday home abroad and if you can get cheap flights to it, you are going to use it as often as you can. That means that seasonality patterns are dramatically affected for a lot of products. A lot of our clients are finding this. The soft drinks world, for example.



Our passion for motor cars: – It is not so very long ago Colm McCarthy of DKM used to say to me that there was a natural limit to the number of motor cars that the Irish population had a demand for. It was about half the figure currently operating.

That peak, by the way in 2000 - do you remember the Government had a clear out scheme, get rid of your old car, get a new car, get all these old cars off the road.

It worked, because if you add up the number of cars that were sold between 2000 and now, 70% of the motor cars on the road have 2000 or later registrations and that changes the world we live in, in a very big way. If you get used to driving around in a nice new car and it is kept clean and all of that kind of thing, it changes the mental setting in a big way.



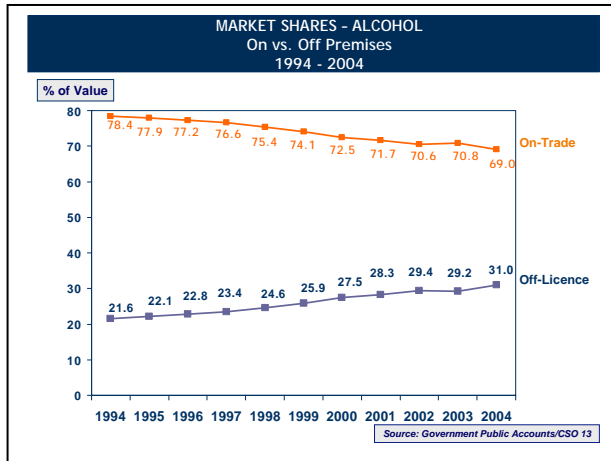
One of the most interesting things for me, looking back over what has happened in Ireland, has been in our consumption of alcohol.

I can remember in 1988 being with a bunch of no hopers at the match in Stuttgart when we managed to beat England. I thought at the time “nobody drinks like the Irish”. That was 1988, when we were ranked 29<sup>th</sup> in the world in terms of alcohol consumption per head.

In the early days of the Celtic Tiger we went from being 29<sup>th</sup> in the world, to being second in the world in our alcohol consumption per head maybe we didn't know what else to do with the money.

You can see the steam has started to come out of that in the last few years. There are good reasons for that. When I talk about “goals changing matches” - here is a real case of it. If you came home with me this evening from my office to my home and if you drove, as I do, down Bath Avenue:- Murray's, which was owned by the people who own Doheny and Nesbitt's, is closed. If you go across the toll bridge, the Yacht, at the far side of the toll bridge is closing. If you go along Dollymount to the Dollymount inn (one of the biggest pubs in Dublin) – closed.

Most of them are being turned into apartment blocks and it is not just in Dublin. I was talking to a mate of mine, Eddie Banville from the National Lottery. There have been four major pubs in Naas that have closed in the last year. And they are not re-opening as pubs. “Goals change matches - ok”.



There is a story below that as well. If you look at the off licence as against the on licence trade, this is what has been happening. And the guys who have been over pricing their product in pubs, because they thought the good times would never end, weren't looking at those kinds of numbers. They just assumed they could jack up the prices to make up for what were, in fact, declines in volume. It wasn't just the smoking ban that changed things, it has been coming for ten years.

As you allow for price differences I would guess that 50% of our alcohol intake is now being consumed at home.

**RETAIL SALES - KEY CATEGORIES**  
2005 (Index 2000 = 100)

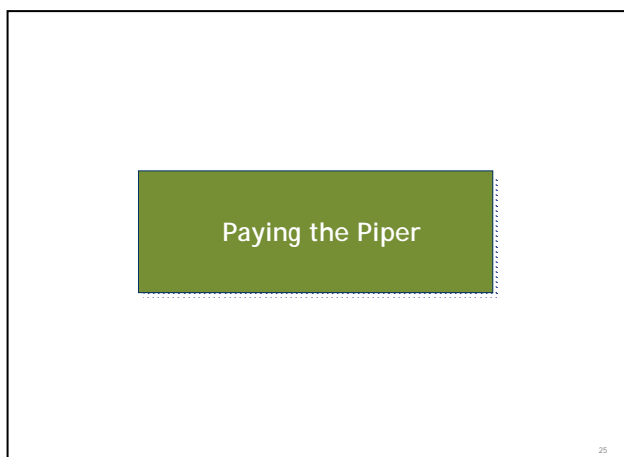
	Value	Volume	Shift in Relative Pricing
Footwear and Leather	123	152	81
Textiles and Clothing	127	152	84
Hardware, Paints, Glass	160	135	119
Pharmaceuticals, medical and cosmetic articles	145	124	117
"Other" retail/sales	125	108	116
Electrical goods	114	107	107
Furniture and lighting	115	106	108
Food, beverages and tobacco	121	104	116
Books, newspapers and stationery	120	104	115
Bars	111	90	123

The effect of that can be seen in retail sales. These are from the Government published data for 2005 as compared to 2000. If you look at them, sales in bars, (in value terms over that period) have gone up by 11%. In volume, they have gone down by 10% and the price of booze in bars has gone up by 23%.

There is no such thing as a consumer who doesn't change his or her behaviour in response to the price mechanism.

But there are some other interesting areas here. The things that we have started to spend a great deal more on are things like footwear and leather, textiles and clothing, hardware paint and glass, (to decorate those homes that we treasure so much) and a huge one, pharmaceuticals, medical and, cosmetic items. I will come back to that in a few moments if I may. They managed to set big increases in volume and in price.

But there are some other interesting areas here. The things that we have



So our incomes are slowing down. We are still addicted to the big ticket items and we are being more choosy about where we spend our money on small luxuries. So how do we pay the piper?

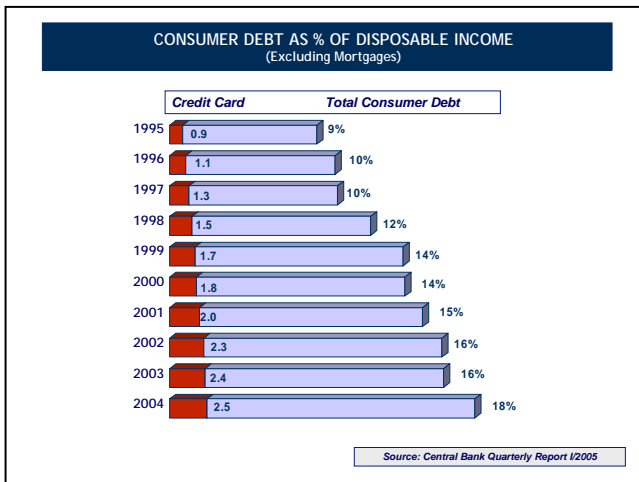
**CONSUMER DEBT**

- In 1995 the typical Irish household debt amounted to just under half annual income.
- By 2004 it was well over 100% of income.
- However that includes mortgages. If we leave these out, the story is more "telling".

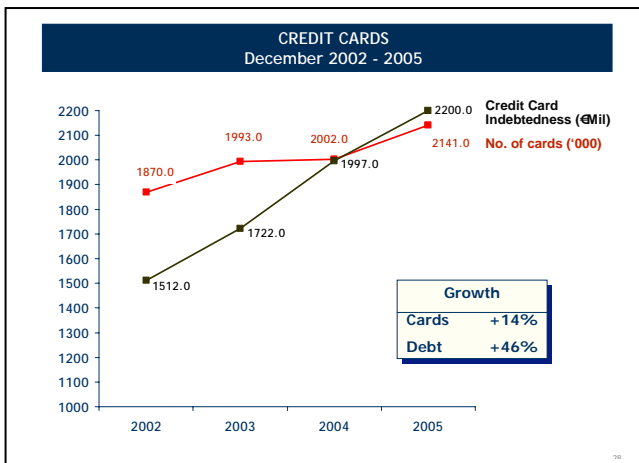
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In 1995 the typical Irish household debt amounted to just under half our annual income. By 2004 it was over 100% of annual income per household in the country.

That includes our mortgages, but even if we leave that out, this is what is happening.



The amount of stuff that is paid for via debt has doubled over that 10 year period.



If you take the number of credit cards and the indebtedness of those credit cards, over a relatively short period of time 2002 – 2005 the number of credit cards in domestic hands went up by 14%, the indebtedness on those cards went up by 46%.

**CREDIT CARD PENETRATION AND USE**  
- International Companies -

	No. of credit cards per 1000 inhabitants	No. of transactions per inhabitant	Average value of transaction (€)
Eurozone average	411	8.3	81.2
Ireland	456	20.5	87.5
UK	1066	31.8	102.4
USA	4361	62.0	85.9

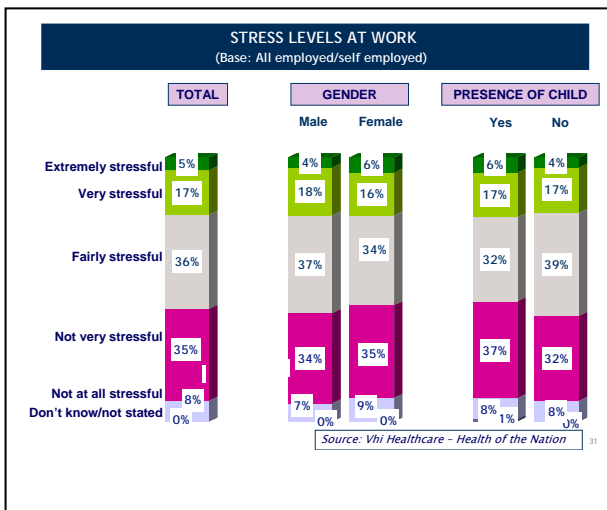
**Which model will we follow:  
Boston or Berlin?**

Source: Central Bank Quarterly Report I/2005

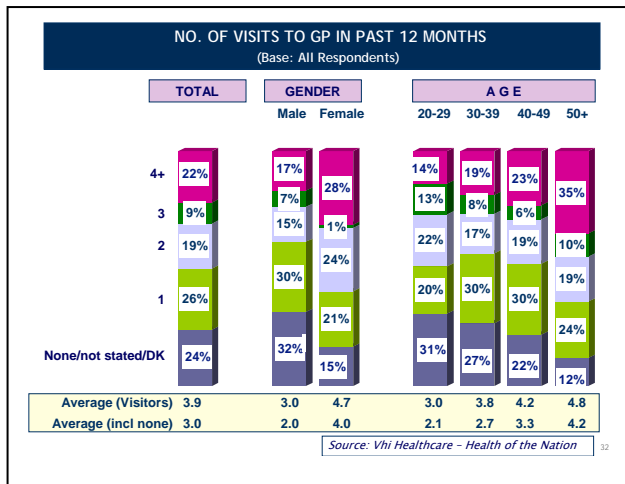
And then you have to ask yourself where are we going next? We are still relatively low in the credit card stakes by comparison with Britain or the USA. We are high by comparison to Continental Europe, but which path are we going to follow and what are the consequences of that going to be?



There have also been non financial costs and I would like to just say thank you here to Brendan Finn of Vhi Healthcare for giving me permission to use some data from a survey we did for them earlier this year. It is, what they call, the Health of the Nation project.

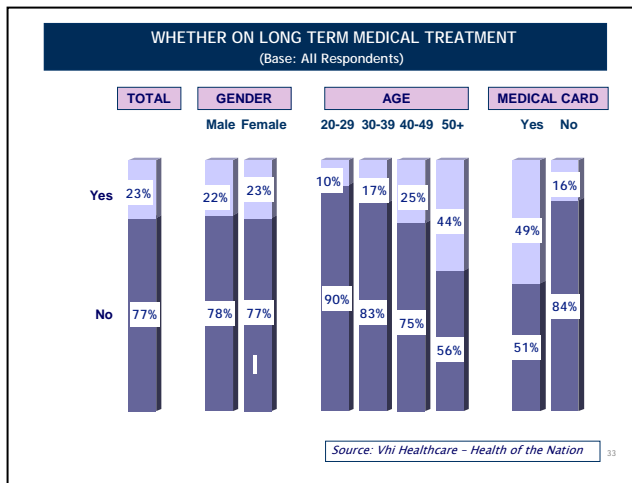


Here is just one index of the non financial costs. Between a fifth and a quarter of us find work levels very stressful now.

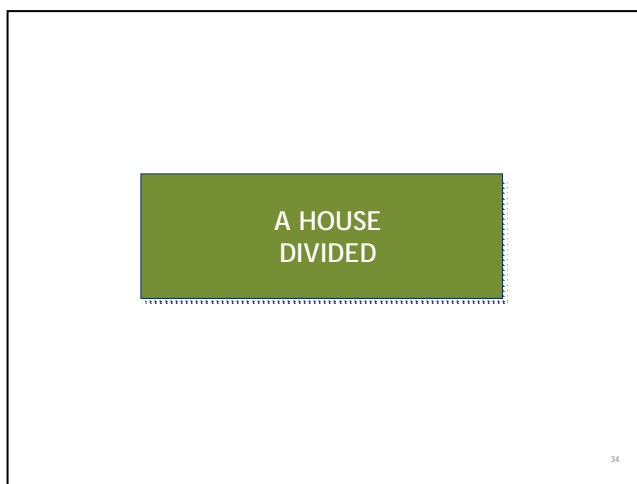


Do you remember I spoke about the pharmaceutical stuff. This is the number of times people are visiting the doctor in a 12 month period. It is not just the a&e units that are facing into overload.

A third of the population are going to the doctor at least once a quarter, and if you go towards my end of the age spectrum it gets worse.



What proportion of people are on long term medical treatment, cholesterol reducing tablets and what have you. Because the doctors have become more scared about not prescribing stuff for people, because of the litigious nature of society, a quarter of Irish people are now on long term medical treatment. For people on medical cards, it is nearly half.



One of the consequences of all this change is that we have ended up with what the old timers would have called a house divided.

**RICH MAN - POOR MAN**

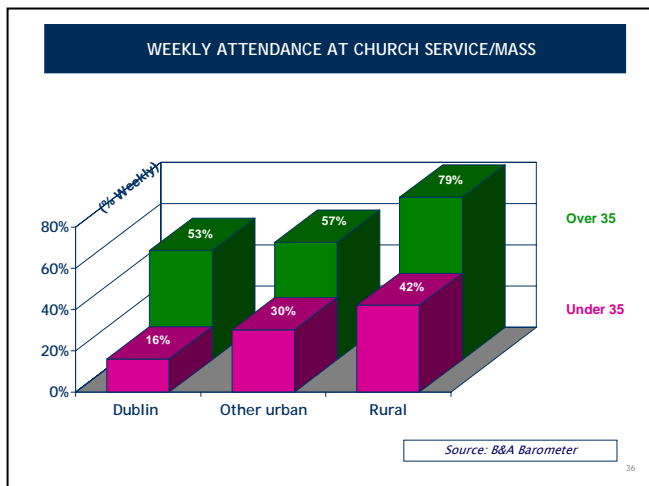
	Spending Power	
	Top 10% vs Bottom 10%	
1995	3.1	: 1.0
2000	3.6	: 1.0
2006	?	

Source: Household Budget Surveys - CSO

Take the Household Budget Surveys (and there is one due to be published early next year which I can't wait to see).

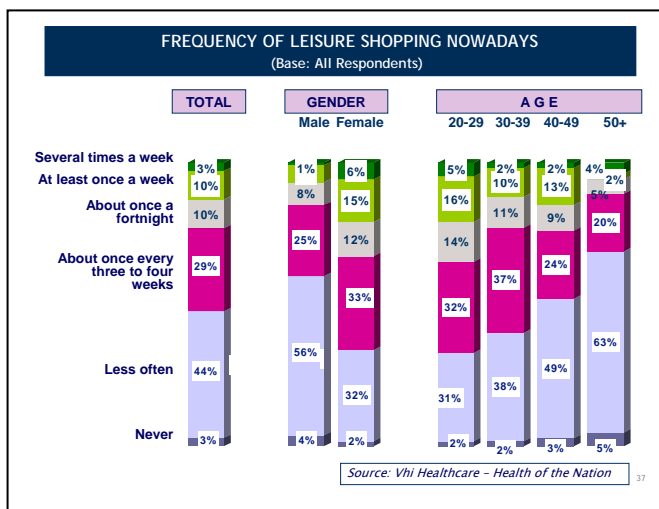
In 1995 - which is the last but one Household Budget Survey published; if you compared the spending power of the top 10% of our population to the bottom 10%, the gap was 3.1 to 1.

By 2000 it was 3.6 to 1. I would guess today it is probably over 4:1. The gap is getting wider.



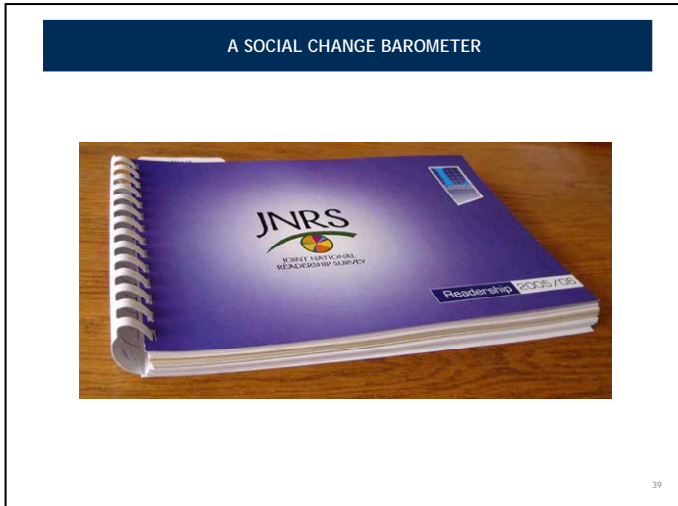
There are all kinds of indices you could look at to demonstrate that type of change. This information is probably about three years old now. It is looking at church attendance in Dublin, other urban areas and rural areas for under 35s and over 35s.

At one end of the spectrum - the over 35 rural dwellers, 80% were still going to church weekly at that stage. And among young people in Dublin it was about 16% - so a huge, huge differences within society.

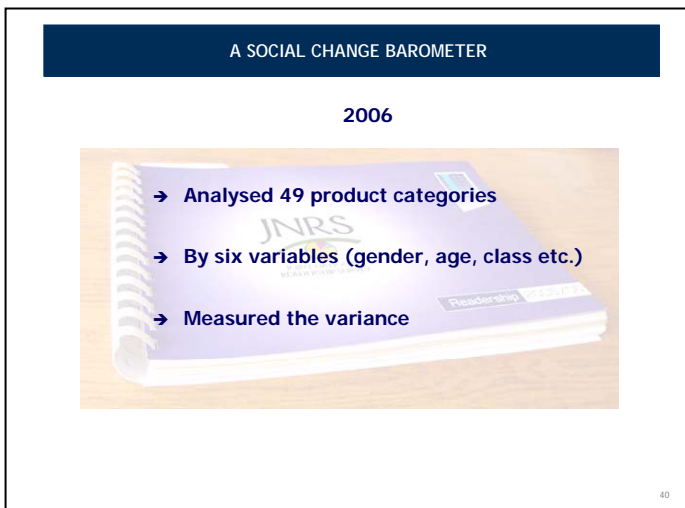


So we have invented a new religion, it is called leisure shopping.

You know it yourself, you see what is happening at the weekends. It is not shopping for groceries; going into furniture stores, home décor outlets, gardening centres and so on. It really is big stuff.

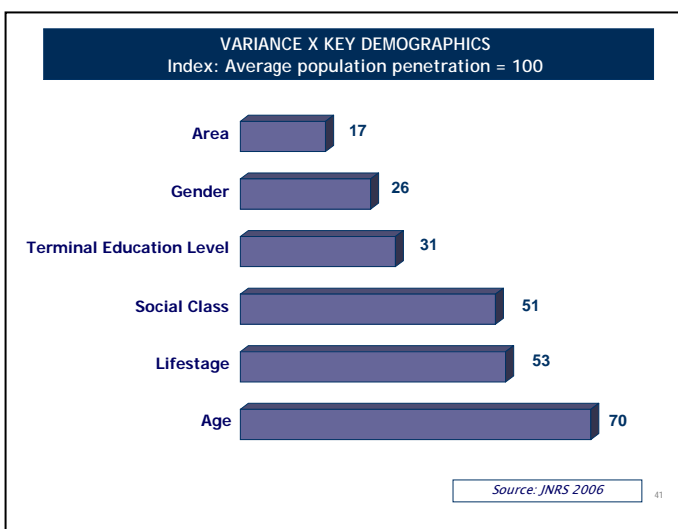


Which brings me to the idea of differences within different groups in society. I was prompted to go to this document - the JNRS which most people underutilise. It really is a very strong barometer of social change in Ireland.



I went back to this year's copy and I analysed 49 product categories in the special interest group area. I looked at them by six variables, gender, age, class, area and so on, and I measured the variance by age, by class etc.

Just the average difference between men and women, between the extremes in age and social class and so on. This is what I found.

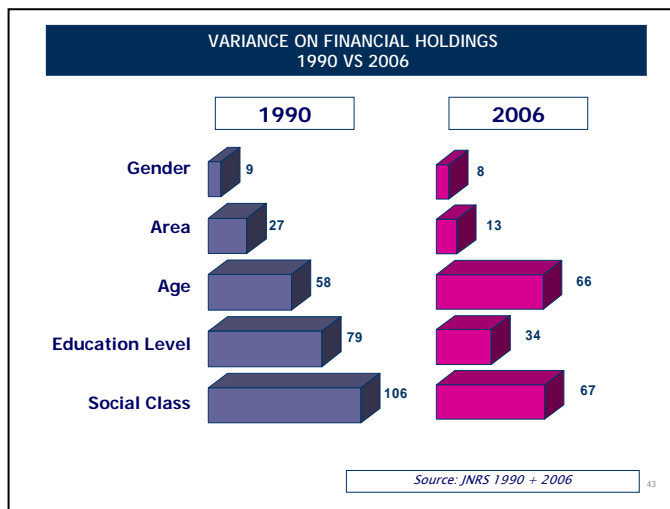


The biggest discriminator now is age. Next is life stage. Social class is still a fairly big discriminator, education level is less of a discriminator, gender is less again and area has diminished very substantially.

INDEXES OF DISCRIMINATION - Standard Demographics -							
No. of Elements	Category Items	Sex	Age	Class	Area	TEL	Lifestage
		Variance : Index 100 = Penetration level in 2006					
3	Alcohol	32	65	29	20	23	32
15	Financial Services	8	66	67	13	34	50
3	Eating Habits	7	109	46	29	30	71
6	Entertainment	18	197	46	34	62	187
5	Pampering	23	43	61	8	38	16
7	Socialist Foods	16	34	22	19	14	31
6	Toiletries	121	55	24	10	11	53
4	Quasi Medical	74	117	48	30	41	104
2	Internet	7	97	133	20	87	44
51	All	26	70	51	17	31	53

Source: Joint National Readership Survey 42

If you look at it, age and class tend to be the main discriminators depending on the area of activity, alcohol, financial services, and so on. (Gender is really important still in the case of toiletries). One thing I did notice, by the way, was on area differences. When I entered this business there was a big difference between Urban and Rural areas and the Rural areas were losing out. If you look at the financial services indicators now there is a higher level of ownership of most financial service products in Rural areas than Urban areas; another mark of change.

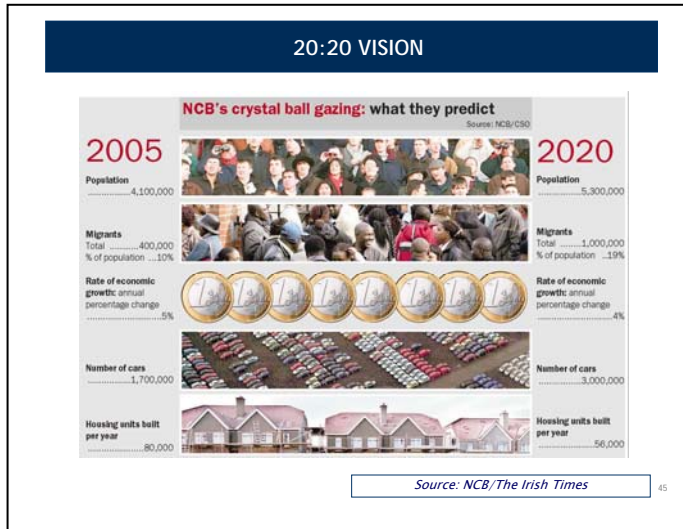


I also went back to 1990. One of the interesting things was that only 9 of the 49 items were being measured in 1990. I think that is an index of the way our own emphasis has changed.

I took the equivalent data, just for financial holdings because they are the ones that had the greatest commonality. Social class was the big discriminator then, but it has diminished in importance since. There have been decreases in gender difference and a big decrease in the urban/rural divide.

Age difference have actually increased. Educational level differences have diminished and the social classes have diminished. So age and class continue to be the main discriminators. Across a wider spectrum of products, age is the most important predictor.

Where are we going to go from here?

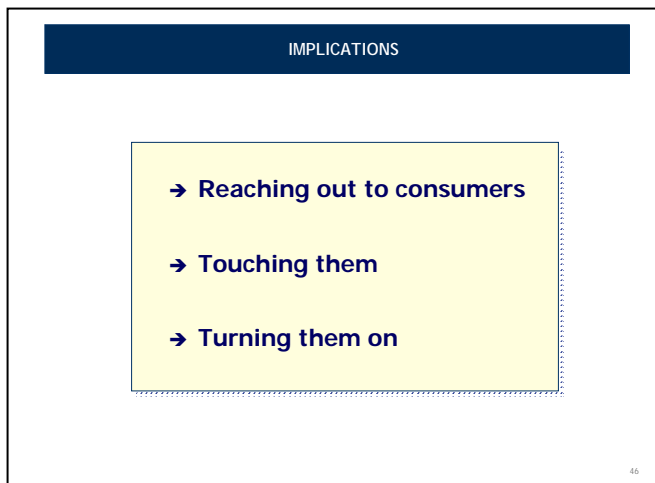


I have just included this chart which was stolen from the Irish Times some weeks ago; a simple summary chart of what is predicted by ncb.

Population growth, from 4 million to over 5 million. The number of migrants -they are predicting from 400,000 to a million.

The rate of economic growth - they are predicting from 5% average down to 4%. The number of motor cars, from 1.7 million to 3 million.

The housing units built – 80,000 a year at the moment. That means that a third of the households in the country have been built in the last five years. So we are living in newer houses as we are driving newer and shinier cars. These things have an effect on the way we think about the world.

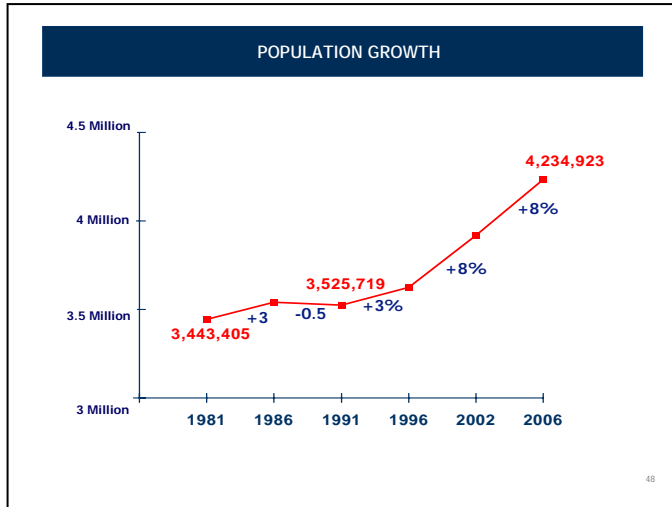


A few final thoughts on implications. I think there are implications at a number of levels: Reaching out to consumers, touching them and turning them on.



Reaching consumers, here I want to deal with the importance of micro marketing. We think we are getting more and more different; we are actually getting more and more similar.

As we get more and more similar it becomes more and more difficult to reach key target groups. So, things like micro marketing come into effect.



I talked earlier about the impact of population growth on confidence.

When you look at it in a shorter time frame, you see how quickly the population has been growing in the last ten years, and how it is still on an upward curve.

That is most certainly going to be a factor in the short term.

### POPULATION INCREASE X PLANNING REGION 1996 - 2006

	1996	2002	2006	10 Year Growth
Border	407,295	432,534	467,327	+15%
Dublin	1,058,264	1,122,821	1,186,159	+12%
Mid East	347,407	412,625	475,026	+37%
Midlands	205,542	225,363	251,381	+22%
Mid West	317,069	339,591	360,651	+14%
South East	391,517	423,616	460,474	+18%
South West	546,640	580,356	620,525	+14%
West	352,353	380,297	413,383	+17%

Where has the population growth happened?

The mid eastern area, that consumer belt around Dublin, the population has grown in the last ten years by nearly 40% in that area. So if you are not there, you are not at the races for a lot of things.

### POPULATION INCREASE PLANNING REGIONS IN COUNTY DUBLIN 1996 - 2006

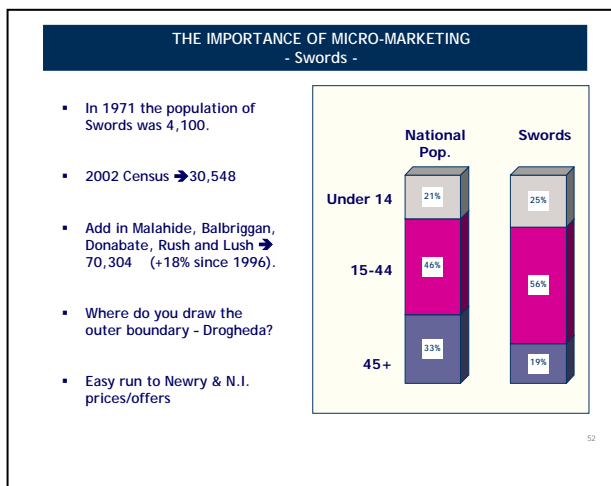
	1996	2002	2006	% Increase (10 Years)
North City	287,216	290,521	294,420	+3
South City	194,638	205,260	211,319	+9
Dun Laoghaire/Rathdown	189,999	191,792	193,688	+2
Fingal	167,683	196,413	239,813	+43
South County Dublin	218,728	238,835	246,919	+13

In the Dublin area, Fingal where I happen to live unfortunately; the population has gone up by over 40% in that period of time.



If you just take as a microcosm of that, Swords – here is an aerial shot of Swords. Go and visit this area as soon as you can. The Pavillions in Swords and across the road the Airside Shopping Centre. They are, for me, the proto type of what we are facing into for weekend shopping.

Why should it have happened in this particular location?



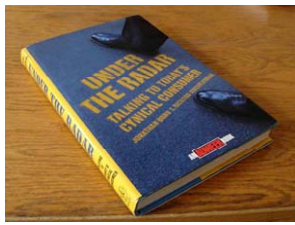

In 1971 the population of Swords was 4001. By 2002 it had grown to 30,548. If you add in Malahide, Balbriggan, Donabate, Rush and Lusk, it is 70,000. Where do you draw the boundary? If you want to go up as far as Drogheda or the people living in that belt, they are within easy reach of Newry and Northern Ireland if they want to go there.

Look at the population structure of Swords as against the population of the country as a whole. The 30,000 people living in Swords are, very very young. There were only 300 people aged 65+ living there in the 2002 Census.



They are all within easy reach of the M50 and connections to Liffey Valley etc. These brands form their familiar landscape.

**REACHING CONSUMERS**

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Reaching out to consumers: We all know it is becoming more difficult. As audiences become more fragmented and more cynical we have to find new ways to reach them.

This is a book that was published in 1998. It deals with this very topic. The author makes a strong case that to reach today's cynical consumers we have to get at them "under the radar".

We are going to see some really creative ways of doing this in the next presentation (Jessica Greenwood of Contagious - UK).

**TOUCHING CONSUMERS**

Understanding the consumer mindset

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What messages do we need to send to consumers? What tone of voice do we need to adopt in addressing them.

Luckily for those of us involved in my particular business, there is no better way of doing this than becoming immersed in regular research designed to understand the consumer mindset.

**18-24 YEAR OLDS FORMATIVE INFLUENCES**

<b>Political Events</b> 	<b>Music</b> 	<b>TV &amp; Film</b> 
<b>Political Events</b> <ul style="list-style-type: none"> <li>☞ Twin Towers and War on Terror</li> <li>☞ Bertie Ahern the dominant Irish politician</li> <li>☞ Middle East teeters on brink</li> </ul>	<b>Music</b> <ul style="list-style-type: none"> <li>☞ Destiny's Child, J-Lo</li> <li>☞ Eminem and rap</li> <li>☞ Rise of nu-metal</li> <li>☞ (Retro) Post Punk: The Strokes, The Hives (punk for people who never heard of it)</li> </ul>	<b>TV &amp; Film</b> <ul style="list-style-type: none"> <li>☞ Fantasy: Lord of the Rings and Harry Potter</li> <li>☞ The Sopranos, Jackass, The Osbournes, Sex and the City</li> <li>☞ Popstars, Pop Idol</li> <li>☞ Reality TV: Big Brother, The cult of instant fame/subversion.</li> </ul>

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I showed evidence earlier that age is increasingly the key discriminant among consumers. We will all find ourselves more deeply involved in research work designed to gain a better understanding of the differences between generational groups.

The influences that are critical informing the mindset of 18-24 year olds are critical to our attempts to get on their wavelength.

Political Events		Music		TV & Film	
<b>55+ YEAR OLDS FORMATIVE YEARS AND DEFINING MOMENTS</b>					
Political Events	<ul style="list-style-type: none"> <li>er Vietnam war &amp; anti war protests</li> <li>er Cold War at its height during Cuban Missile Crisis</li> <li>er 1968: Onset of NI troubles</li> <li>er End of de Valera era and Lemass and then Lynch take over Fianna Fail</li> <li>er Kennedy assassination</li> </ul>	Music	<ul style="list-style-type: none"> <li>er Ballroom</li> <li>er Beatles and Stones</li> <li>er Woodstock a defining event</li> <li>er Hendrix, Doors, Beach Boys</li> <li>er Politics seeping into music: Bob Dylan and Joan Baez</li> <li>er Showbands &amp; Horslips</li> <li>er Radio Luxembourg and Caroline</li> </ul>	TV & Film	<ul style="list-style-type: none"> <li>er James Bond</li> <li>er Westerns</li> <li>er The Green Hornet, The Avengers</li> <li>er Marilyn Monroe dies</li> <li>er Butch and Sundance</li> <li>er TV Arrives: RTE sets up in 1961</li> <li>er Late Late Show</li> </ul>

Those influences are very different from the factors that were at work with earlier generations.

Like all good marketing practitioners we will be giving more and more thought to creative ways of reaching our audience. We will immerse ourselves in their formative experiences to understand their mindset.

How do we get them to respond to our messages?

TURNING THEM ON

We should never be too proud to turn up our noses at learning from past experience.

I would suggest that we need to rediscover the art of telling stories: the sort of stories that carried the message of the hill that swallowed the sun for over 5,000 years.

RE-DISCOVERING THE ART OF TELLING STORIES

I can still remember where I was and who I was with when I saw the film Chinatown for the first time. I left the cinema in Leicester Square in seething rage. I would gladly have killed John Huston if I had met him outside.

The emotional impact of the movie on me, was an enormous compliment to his performance, and to the movie script.

I assumed at the time that the script had been written by Roman Polanski it was much later when I realised that it had been written by

Robert Towne. His original idea was that the movie would have a happy ending. The real power of the movie for me, and I am sure for most people, was its very "blackness".

The public mood at that time was perfectly attuned to that type of ending which was so at odds with what had gone before and with conventional expectations.

Even Mr. Towne himself came to agree: After the first \$20 million of royalties came through.



The people who will have most success in telling their stories in a compelling way to the Irish population are those people who best understand the new Irish, emerging from the melting pot of the last 20 years.

Those storytellers will have something in common with Patrick Kavanagh. They will have a strong instinctive feel for what makes us “tick”. They will have the self-confidence to realise that events that happen on even our little stage can have an international resonance.

In the years running up to the Second World War (in what Kavanagh described as “the year of the Munich bother”) he was fascinated to see that in the border counties the thing that really exercised the minds of his neighbours was a fight between two families over who owned a small plot of disputed land. He marvelled at the scale difference between the two conflicts, but resolved it for himself in his poem, Epic

***“... I inclined  
To lose my faith in Ballyrush and Gortin  
Till Homer’s ghost came whispering to my mind  
He said: I made the Iliad from such  
A local row:  
Gods make their own importance.”***

The builders of Newgrange, who made their mark on the entrance stone to their monument, would, I feel sure, have agreed with that sentiment.

