



Mexico 2016,
a year of (more)
scrutiny and change

GAME CHANGERS



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[Guide]

Ipsos Flair: Understand to Foresee

The world economy and relative weights are changing and our companies are willing to develop their business in increasingly important markets: Brazil, China, India, Indonesia, Malaysia, The Philippines, Russia, South Africa, Taiwan, Thailand, Turkey, Vietnam...

However, these countries are unevenly familiar to international firms and there is the risk to simply project outdated stereotypes, whereas our clients really need information on:

- *Country values and mood, at a specific time*
- *The influence of history, religion and culture*
- *Their vision of the future, their ambitions and desires, their ideals*
- *Their relationship with consumption and brand image*

*This is why Ipsos Flair was created in the first place: in order to demonstrate the originality and sharpness of Ipsos, because **Flair** is about instinct and intuition. It is the ability to capture the mood, to perceive the right direction, to know when to act...*

It is also another way of looking, one that considers survey results as sociological symptoms to understand the real relationship between people and everything around them: brands, ads, media...

Ipsos is uniquely positioned around five major specializations: marketing; customer & employee satisfaction; media and advertising; public opinion research; and survey management.

By bringing together these diverse, yet complementary, perspectives, we are able to explore the many different facets of an individual, be it a consumer, a citizen, a spectator or an employee.

France was the pilot country for Flair in 2005, followed by Italy in 2010, China in 2012, Brazil in 2014, then Colombia and Thailand in 2015.

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks third in the global research industry.

With offices in 86 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management. Ipsos worldwide revenues exceeded 1,669.5 million euros (US\$ 1,84 billion) in 2014.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

1999 was a great year for Ipsos. It was listed on the Paris Stock Exchange and it acquired a 50% stake in the capital of BIMSA (the biggest market research company in Mexico, founded in 1961).

Sixteen years later, Ipsos Mexico is a full-service agency with 211 full-time employees and 13 trainees for a staff of 224, who perform in-house data collection and data processing. The head office is located in Mexico City, having full coverage for its fieldwork operations.

That is why we are very pleased to develop Flair in Mexico, well known as a major stake for all of our clients.

Enjoy your reading!

Henri Wallard
Deputy CEO

[Editorial]

The French writer Georges Bataille wrote this sentence, which is still a subject of reflection: “[eroticism is the approval of life even in death](#)”. Why start with this strange quote?

Mexican folk art is rich in symbols and erotic characters that were discovered in France thanks to the surrealist writer André Breton and the pictures he took during his trip in 1938. Similarly, Octavio Paz, and not only in *Ladera Este*, wrote glowing pages about the soul and the body, mixing local images and Hinduism. In Greek mythology, Eros is the name of the god Embodying Life’s energy in all its forms.

Death is ubiquitous, in the annual celebrations dedicated to the deceased, in the cult of the Holy Death, even in “narco-corridos”. You might almost imagine that Bataille’s sentence could be the national motto.

Cinema has popularized the idea that Mexicans know no limits and have a touch of madness: “Spectre”, which puts James Bond in Mexico, stays true to stereotype, but it makes an explosive tribute!

For our first Ipsos Flair in Mexico, we had to resist the fascination inspired by this old country dating back 30 000 years, with the Olmec, Mayan or Aztec civilizations. We had to resist the European tropism after the Spanish Conquest of 1521 or the Pastries’ War in 1838, or the spirit of revenge after the War of Independence of 1810 and the war against the United States.

After fifty governments in the 19th century, the Civil War, three republics and two empires, the 1917 Constitution, a political and social stabilization period finally started after WWII. It promoted Mexican economic expansion and growth, allowing the second economy of Latin America to finish 2014 with +2.4%, raising the IMF hopes: a result of +3.5% in 2015.

The report of the Organization for Economic Cooperation and Development (OECD) welcomed the “Pacto por Mexico”, an “[ambitious program of structural reforms to improve economic conditions and stimulate growth](#)”. The OECD expects an increase of Mexico’s GDP by 1% per year over the next twenty years if reforms are enacted.

On the other side, the issue of social security is far from settled, creating a climate of fear and weakening the balances. Every day the media announces atrocious crimes. Journalists and women are murdered, hundreds of corpses are found in mass graves, kidnappings, disappearances (e.g., the students in Ayotzinapa, a news relayed around the world). The depreciation of the currency against the US dollar, the appeal to massive strikes to cripple the country, the meltdown are other issues in the air.

We will not add fuel to the fire, but the escape in July of El Chapo Guzmán Loera, head of the Sinaloa cartel, opened up a hot debate on the territory's control by drug traffickers and on corruption and threats at all levels of society.

In this context, the difference between the optimism of economic partners and commentators and the pessimism of the population is not surprising. This matter is fueled by major topics: crime, poverty, corruption, low wages and unemployment.

Therefore, our first Ipsos Flair in Mexico paints a picture in *chiaroscuro* of a great country afraid of decline: it is time for all stakeholders to find new solutions adapted to demographic, moral and cultural renewal in the coming society. It wants to go one step further.

Yves Bardon
Ipsos Flair Program Director

Perspective from Alex Grönberger – CEO of Ipsos Latam Region

Rudos against Técnicos?

Mexico is in fashion. We see rising interest in the news and from global analysts. Surely a big part of it is in surprise to see how the country keeps on moving up and forward while the BRICs and the majority of emerging markets are grinding to a halt. It might also be because it succeeded in transforming a commodity-based economy through a process of industrialization that isolated it from the commodity price crisis that is hitting the rest of Latin America.

In a recent article by *The Economist*, Mexico was portrayed as two-faced, even schizophrenic, country that was thriving in the north and going backwards in the south and in the lower suburbs of its big cosmopolitan cities. This view reminds me of “*lucha libre*”, the popular Mexican wrestling matches. In all fights the wrestlers position themselves either as “*técnicos*” (the good guys) or “*rudos*” (the bad guys). Of course, you never see the miracle of a *rudo* turning *técnico* or vice versa, but most interestingly the bad *Rudo* guy is the one that gets the most cheering and enjoys more popularity! Is there a majority of people rejecting the modernization process and fighting to stay in informality and cheering for the *Rudos*?



“El Hijo del Santo against Blue Demon Jr.” by Danksy

I don't think so. I understand that if we create a picture of the country today we could see one bright face and one dark face, but that is because we are catching it in the middle of a long and difficult transformation process. Mexico is a huge country, America's third with 120 million people and a long list of issues to solve. But the determination and willingness of its people are relentless and they are not going to stop until they find themselves again at the top of the continent. It might not happen overnight, but with the current pace of foreign investment, industrialization and government transformation, we will find that every new generation will be more attracted to education, transparency and formality and keep fueling the growth drive.

In only a few generations, nobody will be cheering for the rudos anymore.

Listen carefully and place your bets confidently.

Enjoy Flair Mexico.

Point of view from Javier López – Ipsos Mexico Country Manager

To the inhabitant of New York, Paris, or London, death is a word that is never uttered because it burns the lips. The Mexican, on the other hand, frequents it, mocks it, caresses it, sleeps with it, celebrates it; it is one of his favorite toys and the most permanent lover.

Octavio Paz

“Mexico, I believe in you...” That’s the beginning of one of our country’s most popular and renowned poems. These verses reflect our deep, however irrational at times, nationalism, which nonetheless some Mexicans have little faith in...

Everyday sayings, such as: “we are the country where nothing happens”, “no Mexican can bear success”, “if you ain’t cheating, you ain’t trying”, and so on, reflect that the main barrier against growth, and especially against believing in our future, lies in our own idiosyncrasy.

Over the past few decades, the divergence between different “Mexicos” has truly become more evident and now there is a wider gap—and I am not talking about the gap between wealthy and poor, known by everyone—between a formal, dynamic, thriving, hopeful Mexico and another Mexico that lives only to regret and reproach deficiencies, recall limitations, refusing to accept our country’s potential and the time needed to shape a better future.

Only a fool would deny that Mexicans are changing at a fast pace. We just need to see the degree of technological development (the quick penetration of Smartphones is a fine example) in small towns and large cities. The country is becoming urbanized and connected in leaps and bounds. According to Facebook data, in 2013, Mexico ranked second (only after the USA) in the number of active users, with 54 million monthly users and 34 million daily users.

Habits change. According to our surveys, Mexicans are no longer inactive individuals who wait and settle for little. They are becoming educated, hard-to-please consumers. It is worth noting that, despite our passionate, soft-touch profile and evident proclivity to procrastinate, communication-wise we increasingly love brands and products that talk to us directly, straight to the point. We like

emotional advertising, but there's nothing better than being told things as they are.

Likewise, it is becoming more evident that Mexican consumers demand more in exchange for their money; they no longer hesitate to punish their favorite brands' equity; they are increasingly harder to please; and they are open to new options contributing to growing value. Even if we are loyal consumers, we have become increasingly more difficult to be "secured or tied".

Depicting a polarized, prejudice-filled society is complicated; and so is, undoubtedly, trying to understand it. We can't set aside our country's rough past, the violent past that rises again to remind us that there are forces opposing what most Mexicans think or want. These forces show no mercy and are obsessed with destroying our peace and calm, putting our nation's future at risk.

However, we must keep in mind that, in a country of 120 million, only a handful seeks to fuel these negative forces through violence and cowardice. The vast majority works daily to make Mexico the 13th global economy, the 10th tourist destination worldwide, the main exporter in Latin America, the country within the region that has managed to depend less on its primary sector and to develop a sound industrial base. Mexico is a young and vibrant market, increasingly growing and demanding better products and services; it is the country where millenary culture and history coexist every second with sweeping technological changes.

Our country is reinventing itself and that will take some time. Undoubtedly it is painful to find that Mexico is still full of missing people, criminality, and impunity.

However, it is noteworthy and auspicious that the spirit of change gets stronger with every passing day. Young people no longer believe as easily in the same obsessive speech of yore where everything seems to be going well, which was fully accepted by previous generations. We live in a society increasingly fed up with endemic wrongs.

Widespread indignation vibrates against the corruption that plagues us, especially because there are already many who believe in a modern Mexico, one that changes, reinvents itself, and is bigger than all its problems. A Mexico that can get rid of its complexes, its atavisms, and show itself to the world as an option of change and opportunity for citizens and investors.

In *Anatomía del mexicano* (*Anatomy of the Mexican*), Roger Bartra, through a series of essays portraying Mexicans of recent years, provides a key clue that will allow us to better analyze our consumers and citizens: “Mistrust among us is a value in itself; it is one of the factors to find the Mexican’s equation. Sociological or anthropological approaches, scientific approximations, political descriptions, or popular wit are not enough. The metaphor, even if worn out, is still valid, and the Mexican is an unsolved theorem in his phenomenon and existence.”

This first edition of *Flair Mexico* is an example of the diversity of opinion that makes this country great. Mexico’s future lies in our differences and the way we manage them. Our contribution to the solution of this theorem is captured in these pages, from a critical and objective vision of reality, but even more especially from the opportunities we have ahead as a country.

Enjoy your reading!

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A photograph taken from the perspective of someone on a boat. In the lower-left foreground, the profile of a young woman with dark hair is visible, looking out towards the water. The boat's interior, including a curved wooden ceiling and a red-painted wooden structure, frames the view. Through the opening of the boat, a calm lake is visible, surrounded by dense green trees. In the distance, two small boats are on the water. The sky is overcast. Overlaid on the image is a quote in white text.

「User's guide」

Wisdom lies neither in fixity nor in change, but in the dialectic between the two. A constant coming and going: wisdom lies in the momentary.
Octavio Paz, *The Monkey Grammarian*, 1974

Mexico in the eyes of a foreigner

B Y Jesica Bastar
Ipsos Loyalty

Mexico is an interesting and fascinating country for many foreigners around the globe who have become acquainted with it due to business or pleasure. Even though, at times, the number of tourists has decreased, mainly due to criminality, it grew 20.4% in 2014, according to the Banco de Mexico's figures.¹ Regardless of the increase or decrease in tourism, most visitors agree on Mexico's biodiversity and cultural richness, which often makes them fall in love with it.

¹ REYNA, J. *Crece 20.4% el número de turistas extranjeros en México en 2014* [online]. Available at: <http://www.jornada.unam.mx/ultimas/2015/02/10/crece-20-4-el-numero-de-turistas-extranjeros-en-mexico-en-2014-5774.html>

A cultural feature that foreigners find extremely appealing is Mexicans' zest for celebration. In this regard, Nobel laureate and one of Mexico's most outstanding writers, Octavio Paz, wrote: "the lonely Mexican is deeply fond of parties and public events. Everything offers an opportunity to get together, any excuse is good to stop the clock from ticking and celebrate feasts and men and happenings. We are a people of rituals."²

² PAZ, Octavio, *El laberinto de la soledad*, FCE, México, 2000.

Some of the feasts and traditions foreigners find most surprising are Independence Day, due to the patriotism it entails, and the Day of the Dead, since many cultures consider Death a taboo or something to be afraid of. However, during the first days of November, both Death and the deceased are commemorated in Mexico by visiting the cemeteries and embellishing graves with bright colors and flowers (especially, Mexican Marigold), and building offerings with photos of the deceased and his favorite meal, since it is believed his soul will return to spend time with his family and get nourished from the essence of the food offered. This tradition has been declared an Intangible Cultural Heritage by UNESCO and defined as "the indigenous celebration for the deceased",³ thus strengthening its relevance and value, not only for Mexico but the world as well.

³ UNESCO. *Las fiestas indígenas dedicadas a los muertos* [online]. Available at: <http://www.unesco.org/culture/ich/es/RL/00054>.

⁴ VALDEZ, C. México, visto con los ojos de un extranjero [online]. Available at: <http://www.publimetro.com.mx/vida/fotos-mexico-visto-con-los-ojos-de-un-extranjero/mmqg!TjFXmF59xgmE/>

In the eyes of foreigners, Mexico is much more than parties; as Alan Campbell, a Scottish photographer who discovered that people, colors and landscapes shape our country's image, explained in an interview for Publimetro:⁴ "I am fascinated by this country. I think that when people visit it for the first time they are unaware of its vast and impressive culture and biodiversity, which is also very worthy of being captured on camera."

Besides tourists and professionals, students also visit our country. Camila Gómez is a Colombian girl, who travelled to Mexico to further her anthropological studies. She said, “I’d take from Mexico its unity and respect for traditions. That’s something my country is missing, because Colombia’s memory has been lost. Here everybody, from the youngest to the oldest, is aware of his past. Back home we forget everything.”⁵

In addition to opinions and views posted on different media, there is also a large number of books written by foreigners on their experiences in Mexico. Here are two examples:

- Michael K. Schuessler’s *Perdidos en la traducción* (Lost in translation) shows the insights of five characters, who spent time in the country at different times throughout the 20th century. Despite having documentary fiction at its basis, he uses biographical and historical data and a bit of imagination to pay tribute to all foreigners who have been welcomed to the country with open arms. The book also portrays the feelings of this American author, who has been living in Mexico for many years and also has been seduced by our country, thus revealing Mexico’s many different shades and nuances.⁶
- *Alma de mi alma* (Soul of my soul) by Carol Miller (journalist, translator, historian, researcher and sculptor). She arrived in the country over 50 years ago. Her book depicts an idea of Mexico that —according to her— Mexicans are unaware of and explains the reason why foreigners love it so dearly. “It first permeates your sight, then your hearing, next the smell and finally it gets underneath your skin until you’re soaked in it; it runs in your blood and lives in your heart.” The author said the idea for her book came from the indifference she noticed Mexicans express towards their own country, thus feeling compelled to write about its fascinating qualities. To do so, she gathered the stories of 18 people (including her own), through which she seeks to describe the amazing nature of Mexican culture. The book is dedicated to Mexico and she stated she would not leave Mexico, because it has become a part of her and she could never forsake something inherent to her.⁷

These books are an example of foreigners’ favorable opinion of the country and everything it entails. Like any other country, Mexico has problems, which do not however undermine how fascinating it can be.

⁵ HERNANDEZ, A. *Para ojos extranjeros México es un país que no olvida* [online]. Available at: <http://gacetapoliticas.blogspot.mx/2011/09/para-ojos-extranjeros-mexico-es-un-pais.html>

⁶ PONIATOWSKA, E. *Perdidos en la traducción, cinco relatos biográficos de Michael K. Schuessler* [online]. Available at: <http://www.jornada.unam.mx/2015/01/18/opinion/a04a1cul>

⁷ SIERRA, S. *Carol Miller frente al espejo mexicano* [online]. Available at: <http://www.eluniversal.com.mx/cultura/69675.html>

Marketing applied to foreigners' vision

Foreigners' vision of Mexico has been positively used by several brands, making the most of the world's appreciation for our country's traditions, by highlighting our colors and artistic expression. And this, in turn, has helped them build a strong positioning.

Designer brands, such as Pineda Covalin, are a clear example of successful brands working with this vision, which uses Mexican culture as a basis and then shows it to the world. This company was created by Mexican designers who promote Mexico's cultural richness through silk designs; hence sharing with the world its art and history in an avant-garde and exclusive way. This brand has been present at different national and international forums and fairs.

Other Mexican entrepreneurs have been recognized abroad thanks to scenarios introducing them, such as the showroom *Mexico está de moda*, a platform where "Mexican fashion is emerging through trends that mix traditions, folklore, culture, and innovation; where our ancestors' identity and cultural richness evolution is inherent to every new design. Every fashion piece is an art symbiosis that portrays a unique expression of contemporary Mexico." ⁸ One of the companies participating in this platform is *Xocolhátl*, a coffee boutique located in Madrid that offers traditional Mexican beverages, which are a relevant Mexican tradition.

It is worth mentioning Mexican traditions are not only useful to Mexican brands abroad, but also within the country. An example of this is AG, a brand that has been quite successful in Mexican stores and is becoming known as a trendy brand that promotes culture and rescues many things foreigners consider beautiful, but which Mexicans fail to see.⁹

Mexican culture is full of positive and rich features allowing brands to create an identity that, when used opportunistically, can help them grow and expand, strongly engaging with consumers.

⁸ *México está de moda. Concepto* [online]. Available at: <http://mexicoestademoda.com/concepto/>

⁹ SOLIS, A. (2014) *¡Ay, güey! El emprendedor que triunfó a la mexicana* [online]. Available at: <http://www.forbes.com.mx/ay-guey-el-emprendedor-que-triunfo-a-la-mexicana>

Mexico, a land of contrasts

B Y Israel Gudiño
Ipsos Marketing

There is no question that Mexico is a country of considerable diversity and countless wealth, resulting from its fortunate geographical location and countless cultural expressions. It could not be expected that a country with such offer of environments and culture did not polarize opinions and show contrasts. Mexico is a country of clashes, many already common for its inhabitants, though clearly distinguishable and surprising for its visitors, who find in them a unique and distinctive characteristic of this great nation where, in many senses, justice has not been done in spite of the Revolution.

This article identifies some contrasts and discusses them as notes that break a pattern and are perceived by anyone. To carry out this analysis, it is essential to review some events of 19th century Mexican history that strongly influenced the current situation and help us explain the social contrast that leads, in turn, to the different cultural expressions.

Undoubtedly, Mexico is a culture of service where work is perceived as something sacred for those who have it and where nobody dares lose it. We have been raised to believe that working hard is some sort of survival instinct. We belong to a culture that has taught us to be both helpful and nice, two elements which, among many others, made Emperors Marie Charlotte Amélie Augustine Victoire Clémentine Léopoldine de Saxe-Coburg-Gotha et Orléans-Bourbon-Deux-Siciles et de Habsbourg-Lorraine and Ferdinand Maximilian Joséph Marie von Habsburg-Lorraine (better known as Charlotte and Maximilian of Habsburg) fall in love with Mexicans.

The emperors came to Mexico invited by the Conservative party and the Catholic Church in 1861 to reestablish the Mexican Empire that Agustín de Iturbide had started but failed to continue. The Conservatives sent a commission to Europe to find a member of the House of Bourbon who would accept the Mexican crown. Driven by France and its expansionist interests, Charlotte and Maximilian arrived to Mexico in 1862. They established their residence in the Castillo de Chapultepec and it could be said that the relationship of the Imperial couple with Mexico was love at first sight. They were astonished by the natural wealth and adopted the national food, habits, and traditions. Nevertheless, the emperors found a country displaying an extremely fractured

society, and they undertook to restructure the laws and institutions so that the overall population was favored; they abolished both corporal punishments and children labor, and regulated working hours. They also carried out works that fostered the country's modernization. However, these modern and avant-garde ideas were opposed to those of the plotters who had brought them to power. Meanwhile, the United States Civil War had ended favoring the Republican Northern States, which renewed their support to Benito Juárez and drove the withdrawal of the French power in Mexico, abandoning the Mexican Empire to its fate, with no support from France.

There is no doubt that this chapter of Mexican history was somewhat a fair and healthy –although inconsistent– initiative for the country, as it has already been the case in the past, before the collapse of this foreign empire, where the country and its rulers failed to converge. This lack of continuity during the country's history is most likely to clear up some contrasts we witness today. The struggle for power leads to ruptures and to an interrupted development curve, hence generating division and groups with diverging interests. Since there is no national integration, social contrast symptoms may be perceived.

There are two outstanding facts in this chapter of history: the first is associated with the Conservative party and the Catholic Church resorting to Europe every time there was a need for restoring order in the country; the second has to do with the Liberal party, who sought the support from the United States (which were already a great Western power) to foster avant-garde ideas. Both facts evidence the undeniable lack of synergy, organization, and sovereignty that has prevailed since the very inception of modern Mexico, and which probably led to backwardness in terms of its industrialization and development, besides promoting fragmentation. A past that, far from being inclusive, promoted conflicting conceptions about the State.

Another key stage in Mexican history that reveals the origin of social differences and numberless cultural expressions is the "Porfiriato". In 1876, José de la Cruz Porfirio Díaz Mori took power and turned into a dictator, remaining in power for 30 years (with a single interruption from 1880 to 1884). Porfirio Díaz's policy was based on positivism, promoting order and peace as the pillars of his government. And it was precisely this government that promoted the progress the country so desperately needed; furthermore, it achieved in his cabinet the convergence of different groups under the same line. This stability period fostered Mexico's scientific and cultural development, allowing literature, painting, music, and sculpture to flourish. The first institutes,

libraries, scientific societies, and cultural associations were founded during this period. Popular art looked for expression elements in the Mexican culture, which, considering many events characterizing Mexican history, I am certain are easy to find and gather.

《INTERVIEW》

The Mexican historian José López Portillo y Rojas in his work Elevación y Caída de Porfirio Díaz, states that the national progress during the “Porfiriato” also changed the president’s appearance, who turned from a soldier with rough appearance and vocabulary to a refined politician, after he married Carmen Romero Rubio, who came from rich distinguished family of the Mexican society. Besides a taste for a refined lifestyle, Carmen Romero also taught the President English and French, a small though significant detail that probably helped, among many others, to extend Díaz international projection and, hence, the country’s exposure and opening to other nations. Simply between 1877 and 1900, Mexican exports quadrupled, not to mention the French style that permeated the country’s society.

The railroad was a major achievement of Díaz’s government. This important breakthrough connected a country that had lived isolated in its own territory and where urbanization was not promoted, except for Mexico City, since the rural Mexico was a favorable environment for the multiple indigenous rebellions that took place throughout the 19th century. As an example of the oppression of Díaz’s administration towards these groups, we can highlight the rebellion of the Yaqui. When the railroad system reached Sonora, “haciendas” and mining were boosted, absorbing the lands of these groups and their labor. The Yaqui decided to rebel and the government responded by capturing the rebels and selling them to the owners of the “haciendas” in Yucatán, a region that remained isolated at that time. This event shows how the indigenous population was subjected and excluded in a

country that was rapidly progressing. Since they neither participated in the country's development nor moved in the same direction, they were offered as force labor and dispossessed of their lands.

Despite the technological breakthroughs that occurred in Mexico during the "Porfiriato", group separation and lack of social integrity kept on being fostered.

It is not possible to review each event in history that provides evidence as to the current situation. However, these events help us understand the social contrasts existing today and why some of the indigenous population in Mexico are poor, with limited or no education at all (6.9% of the population over 15 years of age are illiterate), as opposed to mestizos/Spanish descendants, who have better opportunities and life styles (22% of Mexicans have a monthly income of over USD \$2,300, while 60% earns less than USD \$450, a difference of over five times between both groups¹⁰). Throughout history, one group was oppressed and the other held the reins of the nation's development. The European-oriented government style achieved victory over the indigenous population, but, despite succeeding after a long and violent struggle—which lasted most of the 19th century—, it also stamped two interrelated characteristics: an ever-growing deeper and pronounced dependency, and the decline in the quality of life of the many. Currently, there are around 15 million indigenous people in Mexico who belong to 54 ethnic groups that speak a total of 60 native languages, making of Mexico one of the countries with the highest language diversity worldwide.

¹⁰ Average income of a sector of the population, expressed in dollars at an average exchange rate of 15 Mexican pesos per US dollar.

In terms of urbanization, the country achieved an important progress during the "Porfiriato" thanks to the communication systems that unified the territory. Even when today around 70% of Mexicans lives in urban areas, there is still an important concentration of masses in the major cities (in Mexico City only, the population density per square kilometer is of 5,920 versus 9 in Baja California

Sur). The concentration of industries and government agencies has led to urban areas that account for a good share of the country's consumption. This is a fact used by industries to generate profits, since it favors communication and logistics. However, coverage becomes a challenge when seeking to integrate the rural areas that concentrate 33 million Mexicans and that show significant deficiencies in terms of product supply and overall infrastructure. The Mexican government must take up this major challenge to integrate marginalized populations and provide education, communication, and infrastructure conditions to support development and integrate the country as one single whole, something that, as we have seen, has not been achieved yet.

There is a popular saying that states "There are many Mexicos." It refers to the fact that in the same country we can find social groups that have different life styles, beliefs, aspirations, and opportunities. This phenomenon makes us remember that, in the same territory, we can find various expressions that, if integrated, would help to build a great nation of contrasts with a unique proposal worldwide as well as an exquisite, vast, and fascinating personality.

On the other hand, the geographical location of this country must not be overlooked, since it also provides evidence of the existing contrasts, offering basically all the types of ecosystems and climates (tropical forests, savannahs and grasslands with temperatures that exceed 35°C, and mountain forest that sometimes display temperatures well below 0°C). From the north to the south and southeast, the coastline stretches along 10,143 km that any country would envy because of its beautiful resources that are both revenue-generating areas and significant economy activators through tourism, which represents around 8.5% of the country's GDP. The golden Pacific beaches and the white sands of Cancun invite visitors from all the corners of the world to invest their income in relaxation and pleasure (only in 2013, more than 24 million foreign tourists visited the country). They also come to

be pampered by Mexico's excellent service, a feature that should be emphasized. I can safely assume that in no other country there is a service that is so committed to fulfilling the customer's expectations, which is praiseworthy given the many crisis and wars the country has suffered from since its very origin.

It is also worth noticing that, over the past years, labor quality has improved, the reason why many industries, such as the automotive and aerospace, have turned to Mexico to establish their manufacturing facilities.

These reviewed events lead to rich habits and traditions that stretch from the attachment to beliefs, such as the cult of death (unique worldwide), to the "charrería" festival and the wide gastronomy that combines a broad diversity of flavors, colors, and textures, and has been recognized as intangible cultural heritage by UNESCO. There is a large variety of characteristic dishes from each region, such as the "mole" in Oaxaca and Puebla or the "cochinita pibil" from Yucatán and a long list of other dishes that honor Mexican cuisine, an international gastronomic treasure thanks to its flavors' complexity. Additionally, architectural styles are signs of the different currents that marked history. Pre-Hispanic ruins, Colonial constructions, buildings with European influence, such as the Palacio de Bellas Artes, Baroque cathedrals, such as that in Morelia, or examples of Renaissance and Gothic styles, such as the cathedrals of Guadalajara and San Miguel Arcángel in San Miguel de Allende, respectively, to world-level cutting edge designs and smart buildings are only a few examples of Mexico's structural richness.

The enormous potential of the Mexican market must not be overlooked, neither the opportunity in terms of products' and services' supply that must be provided for the enormously diverse groups that share the same territory. It is evident that social differences have contributed to the considerable diversity of this country and have led to a broad history full of events that brought about nuances

*that, in turn, created contrasts. This is why this country is so surprising and, through its magic and personality, we can also say: “There is nothing like Mexico!”*¹¹

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How to survive in Mexico City without perishing in the attempt

Basic rules for surviving in the urban jungle of Mexico City and its surrounding areas

BY **Magali Rodríguez**
Ipsos Marketing

Description of the Metropolitan Area of the Valley of Mexico

According to the geographical demarcation project of the National Institute of Statistics, Geography and Informatics (INEGI, as per its acronym in Spanish), in collaboration with the Secretary of Social Development (SEDESOL, as per its acronym in Spanish) and the National Council of Population (CONAPO, as per its acronym in Spanish), and in accordance to the declaration signed by the Government of the Federal District and the Government of the State of Mexico, the Metropolitan Area of the Valley of Mexico comprises 16 delegations in the Federal District, with a population of 8,720,916 inhabitants, and 59 municipalities of the State of Mexico, with a population of 10,442,765. This implies that only in the Metropolitan Area of Mexico City there live over 19 million *chilangos* (more than the total population of Chile).

“Chilangos” (Mexico City inhabitants)

There is a considerable debate as to the origin of the term *Chilango*. The dictionary of the Spanish Royal Academy (RAE, as per its acronym in Spanish) points out that *chilango* is an adjective that describes the things or people that belong or are related to this city or to the Federal District. It also extends to everything that belongs or is related to the region and its surrounding areas. According to the Mexican essayist Gabriel Zaid, the term *chilango* originated in the State of Veracruz as a derivation of the Mayan word *xilaan*, meaning wild haired. Other versions, among the many existing, point out that the term comes from the chili pepper vendors that sold their products in the markets and who instead of speaking, sang.

When the term is used by people who do not live in the Federal District, it usually has a pejorative connotation. The social dissatisfaction among *defeños* and people that have

been born in some other state of the Mexican Republic has increased in the last few decades. Anyway, they live peacefully with each other and nothing prevents them from forging social, friendship, or business relationships.

In general, the *chilango* often uses (to a greater or lesser extent) some phrases or words that are sometimes incomprehensible for the rest of Spanish speaking people, including for those who believe they are “fluent in Spanish”. Without going into further details, you will understand this much better if you manage to understand the song “*Chilanga banda*” of the Mexican rock band *Café Tacuba* (we wish you the best of lucks).

Endure the contrast

Though we *chilangos* are a majority in Mexico City, the truth is that we are surrounded by people from different countries (that arrived in the country either legally or not). To give you a close example: my immediate supervisor is from Argentina, I and two other people are Mexican (*chilangos*, the three of us), and the new staff member is fresh from Ipsos UK, and on my daily journey to the office I find a community of immigrants (whose nationality I ignore) asking for economic support to cross the border to the US.

According to the figures of CONAPO, around 67,811 interstate and 5,683 international immigrants are living in the Federal District in 2015.

To the end of adding more figures to this variety and in accordance to the Mexican Association of Market Research Agencies (AMAI, as per its acronym in Spanish), only 18.3% of the population in Mexico City belongs to the high and middle-high classes (ABC+) and the remaining to lower SELs.

This range of nationalities and socioeconomic levels, together with the habits, rituals, and traditions of each group, provide us with a wide variety of people living together and sharing Mexico City day after day. So please, don't despair, endure the contrast, and take advantage of it.

Beware of chili pepper

Fresh or dried, big or small, some hotter than others, and in different colors, chili peppers are considered as a one of the pillars of national gastronomy and their origin dates back to the Pre-Hispanic period. Besides, and do not exclusively, they define Mexican cuisine before others around the world.

Chili is a fruit of the *Solanaceae* family that is cultivated in tropical or mild climate regions. Only in the Mexican Republic there are more than 40 varieties, hence the diversity of dishes that can be prepared with this product in each region of the country.

This hot, spicy fruit is the unifying element between maize and bean, the two other major ingredients of Mexican cooking. The union of these three products is highly substantial, reason why a bean taco with salsa is not only flavorful, but nutritious.

The variety of chili peppers – and their uses in national cooking – is vast and has led to the Mexican gastronomy being recognized all over the world. In 2010, Mexican cooking was declared by the United Nations Organization Educational, Scientific, and Cultural Organization (UNESCO) as an Intangible Cultural Heritage.

However, beyond the variety of dishes that are prepared or seasoned with chili, this product has turned into a symbol of national identity that, together with maize and *tequila*, chili peppers are essential in Mexican dishes and, though they may lead to some gastrointestinal disorders when consumed excessively, have a high nutritional value since they are rich in vitamins C and A, as well as in vitamins E, P, and B, though in a lower quantities. Besides, it helps digest more easily the proteins found in maize and bean.

“¡Ahora es cuando chile verde le has de dar sabor al caldo!” (It is now when the green chili pepper must make the broth tastier), as the saying goes, though this fruit, with its wide variety, is not only present in broths, but in countless dishes. *“¡Chiquito pero picoso!”* (Small, but hot) is another saying associated with this fruit and it is absolutely accurate because, according to scientific research, the smallest chili peppers are the hottest, such as the habanero, chipotle, manzano, piquín, or arbol chili peppers that are also produced in Mexico.

It is often said that, when travelling around Mexico, particularly if you are a foreigner, there is an ailment that afflicts every person that eats the highly spicy, though delicious, Mexican food.

Americans call it “*Moctezuma’s Revenge*”, and it is nothing more than a mild infection or stomach upset caused by drinking water or consuming poorly cooked or not hygienically prepared food. However, most of the times the upset is due to the fact that foreigners are not used to the condiments, such as chili, salsas, and other spices used for seasoning Mexican food, that cause irritation in their digestive tract. So, please “beware of chili.”

Don’t despair

Many things take place in Mexico City that could easily lead any person to exasperation. Traffic is one of them, and I dare say it is the main one. The time it takes to go from point A to point B is unpredictable and may vary from a few minutes to a couple hours, depending on the school season, weather, demonstrations, accidents, etc. I know these factors are common to all cities, but Mexico City ranks second among the cities with the worst road traffic density in the world. The TomTom index, conducted by the satellite geo-location device company, points out that the Federal District reaches a traffic jam peak of 93% in the mornings and, therefore, the city ranks the second worst site in terms of traffic worldwide, only behind Istanbul, Turkey.

The loss of productivity due to traffic jams in the Metropolitan Area of the Valley of Mexico represents a cost for the city of around 55.4 billion Pesos a year, according to the analysis “*Un día en el tráfico de la Ciudad de México*” (One Day of Traffic Jams in Mexico City), prepared by the company Consultores Internacionales, S.C. According to the Government of the Federal District, there are only 14 conflictive road traffic points in the Mexican capital and, hence, traffic jams are not so serious. However, experts in the subject state there are over 60 points that represent a daily ordeal, particularly at peak hours. Therefore, take precautions and don’t despair.

Approaches to understanding the Mexican national identity

B Y Analhí Castillo González
Ipsos Public Affairs

Mexican men are *machos*, tough and enduring; in a constant struggle not to put their guard down or back down to other men. Strong as only Mexican men can be, unbreakable like an oak tree; they are only subdued by their mother —whom they worship— since she is the most innocent and purest of women.

Mexican women live in the shadow of their men because “behind every great man there stands a great woman”. They are discrete and try not to dress provocatively or openly express opinions that might expose them because of their need to “inspire respect”. They are fragile and strong at the same time; that much suffering has made them unshakable, a signature feature of Mexican women.

Both men and women hide a broad spectrum of personalities beneath a thousand masks, since they have an inferiority complex. We are an indigenous, mongrel people: we are Mexicans.

Mid-twentieth century ideologists have tried to build the concept of national identity based on different interpretations of these two profiles. In order to locate the origin of the national identity, four milestones in Mexico’s history are identified: ancient Mesoamerican civilizations, Spanish Conquest, Mexican Independence and Revolution.

However, this exercise rather than being a serious work to determine national identity categories of analysis, created great myths around it. Stories within people’s subconscious minds, with ideas and beliefs explaining mankind’s origin from *spiritual-material*, *human-cosmic*, *causal-coincidental*, *order-chaos* connections.¹²

This is how they made sure to remember and reassert their existence as Mexicans, by highlighting what they have in “common”, creating empathic connections and popular awareness to transcend as a nation by setting a series of patterns that will explain Mexican society’s behavior.

¹² In *El Diccionario de los símbolos* (*The Dictionary of Symbols*), Eduardo Cirlot, outlines the reasons behind myths’ formation, where a direct confrontation between the material and spiritual worlds can be observed.

In other words, they focused on identifying a set of *descriptive* ¹³ rather than explanatory attributes to assemble national identity; by establishing biopsychosocial parameters through which Mexico's social reality can be faced.

¹³ KNIGHT, Alan, "La identidad nacional mexicana", Nexos, agosto, 2010.

Ever since, the disregard of *objective-explanatory*¹⁴ attributes to reveal the national identity has turned it into a set of *subjective beliefs* ¹⁵ that are supported by society minorities. Said beliefs fail to be meaningful since they do not reflect Mexicans' overall opinion.

¹⁴ *Id.*

¹⁵ *Id.*

The problem with subjective beliefs lies in the fact that ritual practices do not include concept variation arising from construing the national identity symbols: local cultures and historical events.

Due to the aforementioned, we cannot talk about a unique national identity since multiple and different worldviews coexist among the local cultures forming the national identity. This situation determines the historical events where a set of aspirations will rise, triggering a confrontation between social groups; said phenomenon is endorsed by American historian Alan Knight's thesis, stating: "Subjective national identity is, many times, highly aspirational and regulatory."¹⁶

¹⁶ *Id.*

Globalization adds great complexity to the national identity study. The new order of social structure goes beyond the capital dynamism and the foundation of new private companies. Globalization was also responsible creating a market for nations' cultural heritage; including the reorganization of the social ruling system and aspirations.

The virtual (intangible) world invasion of the real (tangible) one redefined the aspirational and communication interaction of people in Mexico and the rest of the world. The standard established that people's existence will be defined by their involvement and connection to the virtual world.

Therefore, mass media —now more than ever— is one of the most relevant actors shaping national identity since it is the communication channel of old and new myths on national identity.

National myths creation in mass media strengthens the impossibility to build the myth of *national identity as a legitimizing structure* contributing to social cohesion. Globalization expansion blurred the borders between national and foreign elements, which had a direct impact on national identity redefinition. Nowadays, it is considered the result of a multicultural mix of nations.

The lack of national values due to globalization creates a *sui generis* national identity. This transformation is the result of what anthropologist Roger Bartra calls the “strengthening of local powers”, forces that makes the most out of standards simplification and cultural powers autonomy that, at the same time, boost a strange demonstration of old-fashioned and conservative values, with the arrogance common in the new money [...]; a mix of globalization and provincialism.¹⁷

¹⁷ BARTRA, Roger, *Anatomía del mexicano*, Editorial Debolsillo, 2005, p. 19.

¹⁸ Ricardo Raphael's research mentions that “*mirreyes*” are politicians’ or businessmen’s children with a daily family income of MXP \$84 000, compared to the MXP \$21 daily average wage of 3.5 million poor Mexican families.

¹⁹ RAMOS, Jorge. *El Mirrey es un personaje obsesionado con la ostentación* [online]. Available at: www.eluniversal.com.mx.

The appearance of the *mirrey*¹⁸ character, in Mexico’s social context, is a clear example of these *sui generis* expressions derived from neoliberalism; unlike Cantinflas –a character portraying early-twentieth century Mexico’s poverty– the *mirrey* is identified as a flashy character in a country of economic inequality.¹⁹

The *mirrey* represents the perfect binary opposition to reveal (in terms of national identity) what the average Mexican is not; nonetheless, he shows what Mexico’s upper class is able to do and its role in globalization dynamics; making evident that the average Mexican is someone dealing with social inequality on a daily basis.

In conclusion, the national identity attempts reaching a subjective unification, a phenomenon that –just like mid-twentieth century scholars– prevails among those who want to find a pattern to explain social identity and its effect on Mexicans’ behavior.

Market research analysts are aware that by measuring public opinion, significant differences can be found when analyzing variables such as: age, gender, SEL, level of education and region. The same principle should be used when talking about national identity since a group of subjective explanations fail to represent reality lived by every SEL in the country. However, they do offer elements to understand the diverse circumstances experienced by the 119, 715 inhabitants of Mexico.

It is therefore impossible to build a national identity that can represent all the visions of a country with so many local cultures, which at the same time, try to individually explain people’s relationship with the world they live in and their role as Mexicans.

Something ironic: Mexico's Day of the Dead, more "alive" than Ever

B Y Berta Morales
Ipsos ASI Connect

Day of the Dead, a business opportunity to analyze

An over-120-century-old country is full of traditions, which allow people to break away from their daily monotony and even foster national identity. The Day of the Dead is a deeply rooted tradition mixing up pre-Hispanic and Christian beliefs to create one of Mexico's most representative feasts.

According to pre-Hispanic conception, dying was the beginning of a journey to the Mictlan, the Kingdom of the Fleshless Dead, which was translated by Spaniards as Hell. This journey lasted four days. Once the journeyer arrived to his destination, he offered gifts to the Mictlan Lords: *Mictlantecuhтли* (Lord of the Dead) and his partner *Mictecacihuatl* (Lady of the Dead Precinct Dwellers). The dead were sent to one of nine regions, where they stayed on probation for four years before they continued to their life in the Mictlan, getting thus to the last stage, which would be their everlasting rest place, named "Obsidian" of the Dead.

The indigenous population's idea of death was morally different from the Catholics' connotation, where Hell and Paradise mean either a punishment or a reward, respectively. Ancient Mexicans believed that a dead person's soul fate was defined by the circumstances of his death and his behavior during his life. Just to mention some examples, those who had died from a water-related cause went to the *Tlalocan*, or Tlaloc's Paradise; those who had died in combat, sacrificed captives, and women who had died in labor went to the Omeyocan, the Sun's Paradise, ruled by *Huitzilopochtli*, the god of war. The Mictlan was intended for those who had died from natural causes and children had a special place called *Chichihuacuauhco*.

In ancient Mexico, the Day of the Dead feast celebration was divided into two dates: late August for children and grown-ups in September. Currently, the Day of the Dead feast is celebrated on October 31st and November 1st and 2nd, precisely when the

Catholic Church celebrates Allhallowtide. Of course, the purest essence of this feast can be appreciated in indigenous and rural communities, where dead people's souls are believed to come back those nights to enjoy meals and flowers their relatives offer them.

The most common ways to welcome the dead are two: visiting the grave—which explains the large affluence of people to graveyards all over the country during those days to clean and decorate gravestones with flowers— and building an altar at home.

The altar is placed in a room, over a table or a shelf. Most commonly, altars have two levels representing Heaven and Earth; three-level altars add the Purgatory concept, and seven-level altars represent the seven steps needed to get to Heaven and be able to rest in peace (the latter is considered the most traditional altar). Each level is covered with black and white fabrics.

Dictionary of ingredients to celebrate the Day of the Dead

Some basic elements that must be kept in mind when building an altar are:

Alcoholic beverages: the deceased's favorite, called "trago". They are usually tequila, "pulque", or mezcal shots.

Arch: the arch is placed at the altar top to represent the entrance to the World of the Dead. It is decorated with orange jessamine and flowers.

Bread: it is aniseed flavor, shaped as a rounded dome; it has bone-shape decors alluding to the Cross, and is sprinkled with sugar.

Candles, votive candles, and altar candles: these elements represent a guiding light in this world. Traditionally, they are purple and white, since they stand for mourning and purity, respectively. Altar candles might be placed according to the cardinal directions, while the other candles form a path to get to the altar.

Copal and incense: "copal" is a resin used in ancient Mexico to cleanse and purify some place's energy as well as the user; incense hallows the environment. Obviously, these scents add some particularity to the tradition.

Cross: it is used in every altar; it is a symbol introduced by Spaniard evangelists to instill catechism into the deeply rooted traditions of the indigenous population. The cross is placed in the high part of the altar, next to the deceased person picture; it can be made of salt or ashes.

Deceased person's photo: it is usually placed on the highest point of the offering.

Flowers: they usually decorate altars and graves. The Mexican marigold scent guides spirits through this world.

Food: traditional food or the deceased's favorite meal is placed for the visiting soul's enjoyment.

Imagery of the souls in the Purgatory: it is placed to help a deceased person's soul abandon Purgatory, in case it is in it. According to the Catholic faith, those who die having unconfessed venial sins must expiate their guilt in the Purgatory.

Pierced paperwork: it is considered as a representation of the Day of the Dead's festive joy –because of the color and the wind blowing through the many holes in each sheet of paper. In the past, purple and black were the only colors used; nowadays, strong colors prevail.

Skulls: made of sugar, clay, gypsum, or pottery with colorful decorations; they are distributed along the altar; they are considered a representation of Death and a reminder of its everlasting presence.

Water: this is a very relevant element, since it represents –among other meanings– the soul's purity; additionally, a glass of water quenches the spirit's thirst after its journey from the World of the Dead.

How do Mexicans currently experience this festivity?

Just as the Day of the Dead has survived thanks to the aforementioned syncretism in a very diverse Mexico, US Halloween's influence is added to this feast with its known decoration and costumes. Therefore, pre-Hispanic, Catholic, and 19th century US traditions coexist.

Talking numbers, how does it behave?

Tradition-related products market is not fixed; if we look back in history, it might drastically change. A clear example is *tequila* (called "*t-killer*" by some Americans), which, up to the late 20th century, was considered a beverage consumed by low SEL. Nowadays, after getting the appellation of origin and being revalued overseas, it is positioned in every SEL and some formats can only be afforded by the highest SEL. Worldwide, it represents almost 3.5 billion Dollars sales from the different brands of this beverage. Other *mezcales* are following a similar path.

Getting back to Day of the Dead consumption, according to figures yielded by a survey by Mexico City's Chamber of Commerce, Service, and Tourism (Canacope-Servytur), 41% of the city's inhabitants celebrate the Day of the Dead and 45% celebrate it together with Halloween.

44% of the Mexico City inhabitants, who occupy almost 2.5 million homes, spend an average of MXN \$460 to build the offering, according to 2010 census from the National Institute of Statistics and Geography (INEGI).

In the country, there are over 28 million 600 thousand households and, even if most rural entities have a low family income, traditions are more deeply rooted in them. For instance, the Puebla's Chamber of Commerce, Services, and Small Enterprises (Canacope) estimates that families spend between MXN \$400 and MXN \$600 to build their Day-of-the-Dead offering.

More optimistic figures were yielded by the *Día de Muertos o Halloween* survey, conducted from October 10th to 12th, 2011 by the Federal Attorney's Office for Consumers (Profeco), where 86% of the respondents mentioned they celebrate the Day of the Dead, 6% celebrate Halloween, and 8% celebrate both. Regarding the main activities carried out during the Day of the Dead feast, *pan de muerto* purchase (94%) ranks first; building an offering (85%) ranks second, and trick-or-treating or feast-relates objects (71%) rank third.

Other “dead” to consider

Contrary to common belief, traditions are not fixed; they form rites combining religious and heathen elements, where some are diluted, some are strengthened, and some others are added. For instance, one of this Feast’s most representative elements is the skeleton dressed up as a 20th century wealthy lady, known as *La Catrina*. Curiously enough, this image is much younger than the tradition; it was created by political engraver and illustrator, José Guadalupe Posada, in the early 20th century, who named it *La Calavera Garbancera*.

At first, *La Catrina* went unnoticed, but Mexico’s most renowned muralist, Diego Rivera, who was aware of Posadas’ work, fell in love with those lines as he walked by the engraving workshop on his way to the Academia de San Carlos and appreciated the artist’s work. Several decades later, when the muralist was internationally renowned, he promoted Posadas’ work. *La Calavera Garbancera* was renamed as *La Catrina* and became a symbol; we even watch parades showing women dresses in XIX-century elegance and with skeleton-style make up.

Mexico City became a “Bond” city in the movie *Spectre*, where a monumental Catrina will be seen in a Day-of-the-Dead setting, which will be used as an action-scene frame. It is well known that, to a greater or lesser extent, settings of cities featured in the 007 movies franchise increase tourism and movie’s ambiance will strengthen feasts, not only because of the colorful feast display, but also because these movies work as a lifestyle guidance for many.

It is also worth mentioning that, for different reasons, Mexicans’ lifestyle has drastically changed over the past decades, and it keeps on changing. Societies are dynamic and, despite purists, traditions must adapt; it is not the same an offering in a house than in a small apartment; therefore, a different type of lighting might be needed, replacing votive candles for other lights that might “guide” the dead people’s souls.

November 1st and 2nd are just one example of Mexico’s several traditions that are waiting for a makeover to remain more alive than ever.

「 Pillars and trends 」

〈 **BY Abigail Leal Romero**
Ipsos ASI Connect 〉

The Mexican “pilón”: traditional, trendy and more

Humans are social entities and their behavior always reflects the need to socialize. Even in the most absolute loneliness, their thoughts are always with them, working as a depiction of society itself. Most of the things we do are a reaction to a social urge and that is where we find the vestiges of our past and the constant pressure of the future to come.

Saying that humans are social entities is saying they are historical beings with the ability to create a collective conscience through the stages of their evolution; perhaps the main difference between men and the animal kingdom is memory. Animals act according to instinct, whereas humans act based on their memories.

However, even if humans are social and historical, they aspire to be unique, individual, and modern to the same extent; always seeking new and different experiences. This conflict is expressed through their behavior, which is based on pre-established habits and traditions, and a constant adoption of new and different experiences through innovation and trends: an ongoing battle in any culture and on any life stage.

Traditions represent the restraints from the past and the forces needed to preserve some social forms. Yet, as the years go by, such traditions start to respond to their human side. On the other hand, fashion shows us the adventure and a bridge towards the future. When a tradition is followed, we are searching (at least at an unconscious level) for a representation or a depiction of something that links us to the past, that makes us feel we are part of something deeper than being right here, right now.

In Mexico, traditions walk hand in hand with men and represent a very important part of its cultural essence. With their ups and downs and a great deal of effort, communities struggle on a day-to-day basis to preserve those moments, habits, old-fashioned ways, styles and beliefs that have always been with them and their entire ancestral culture.

Speaking of traditions in Mexico would require much more than just an article. We would need to write an endless series of books where we would always end up in the same place: the sense of belonging that, as I mentioned before, humans unconsciously have the need to preserve at all costs.

Something about Mexicans that is impossible not to talk about is their ability to indulge others. This is an inherent trait that differentiates Mexican culture from other cultures. Mexicans tend to indulge their countrymen, and even foreigners, with their natural ability of letting go their material possessions in order to make their guests feel like they belong. This same tradition has its origin in Mexico's history, from the beginning of commerce and goods trading, where not only the inherent ability of Mexicans to share played a relevant role, but also the ability of their counterparts to obtain what has been called "pilón".

《INTERVIEW》

According to the Real Academia de la Lengua Española, the word "pilón" is defined as follows:

1. *m. Cone-shaped sugar bread.*
2. *m. A weight that hangs from the main beam of a Roman steelyard and slides freely to indicate the weight of things when counterbalanced with it.*
3. *m. In oil mills or tanks, a large stone that hangs from the spindles and works as a counterweight for the beam to be tight enough.*
4. *m. A pile of lime mixed with sand and water that is left aside for some time in a pyramid-shape mound for it to harden better when it needs to be used.*
5. *m. A pile formed of tobacco leaves left to rest until they reach a convenient curing grade.*
6. *m. A bunch, a large amount.*
7. *m. Mex. addition.*

For many years, customers used to get a "cone-shaped sugar bread" as a gift when purchasing something at the market: a kilogram of red tomatoes plus "pilón", a little something extra for their purchase. This was basically a treat intended for children.

Afterwards, "addition, bunch or large amount" became more suitable to mean what people used to get after any purchase-sale transaction. The pilón was then replaced by a couple of additional red tomatoes, an additional handful of beans, and a couple of additional grams when weighing fruits and vegetables and so on.

However, times and cultures do change and become something else. As previously mentioned, people work hard on the preservation of their traditions and habits, which was the reason behind a large-scale advertising campaign promoting the return of pilón. This campaign was ran in the early 90's by Televisa, one of the most influential TV networks in Mexico, along with several sponsors who joined in this effort.

The method through which anyone could get a pilón changed. It was no longer a piece of sugar or some extra product, but consumers had to meet some requirements to get their pilón: collecting a given number of pilón stickers included in participant products and filling a sticker album sheet with them. Each sheet had different trading value and the final reward depended on such value. That is, sponsors gave pilón stickers through the process for consumers to have access to even bigger rewards. The prizes were basically home appliances and electronic devices.

"Come back, come back, pilón... The free treat, the nice detail, the tradition that fills the heart with joy." This was the campaign's jingle that actually created a deeper bond with Mexicans.

Even though the campaign was a success, it could no longer continue after the Mexican peso devaluation in 1994. The value of each pilón sticker was 10% of the product's price and it became impossible to maintain the initial terms proposed by the campaign. This case confirmed that this tradition is still rooted in our culture and that the pilón's rebirth, regardless of its format, could contribute to the success of a well-performed and well-implemented campaign in Mexico that appeals to tradition and ancestral habits.

Another example of renowned brands that have successfully established a connection between a sort of pilón and a campaign success is McDonald's and its Happy Meal, which includes a free children-appealing, seasonal toy. Besides pleasing and keeping consumers entertained with this sort of pilón, McDonald's has managed to form alliances with the most important children movie franchises. Sabritas and its Tazos pose a similar case. This company has been extremely successful by giving away plastic discs decorated with designs from cartoons and movies that have had a considerable impact on the Mexican culture (e.g., The Simpsons, Ice Age, Pokemon, etc.) in every pouch of chips. For years, Sabritas has achieved definite success with each collection's launching. Even though these two cases do not seem quite associated with a pilón's purpose, they still prove that the transformation and interaction of the past, present and future can contribute to a culture's enrichment and evolution in many ways.

Cultures change and are transformed. Holding back the progression of human evolution is impossible. Nevertheless, our collective conscience remains and stands strong before these changes, but it is not a mere resistance to change for the sake of change, it is a resistance to lose what gives harmony to existence. Whatever makes us happy, feel joy, feel acknowledged and experience well-being will be something our collective subconscious will strive to preserve or transform, but never lose.

Mexico is a country of many traditions and an ancestral culture, but it also is a country that takes on new trends, as if its eyes were set on the world's events to identify, try and perhaps adopt a new idea, adding its own hallmark on such trends, and then claiming that this idea, fashion, trend or novelty has been borrowed and modified by Mexicans: it is now theirs, it is no longer similar to the original idea, it now belongs to Mexico.



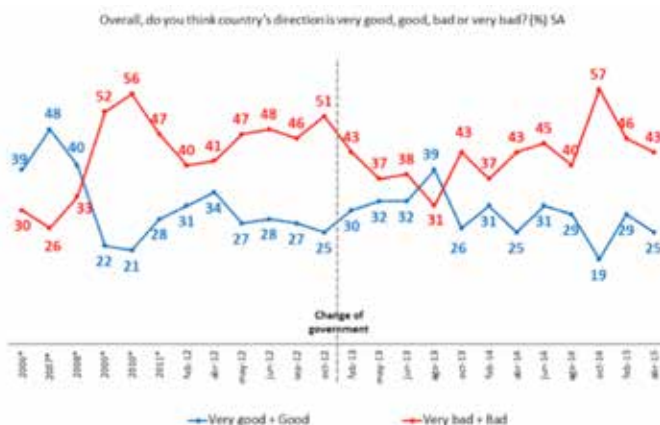
「The new grid」

The Mexican mood: discontent, disappointment and distrust

B Y Patricia López Araujo
Ipsos Public Affairs

Discontent: how do we perceive the country's situation?

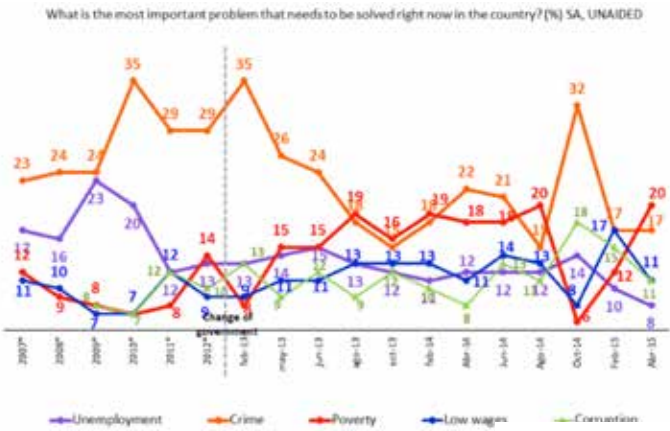
The global financial crisis that started in September 2008 has been a milestone in public opinion in Mexico. According to Ipsos' data, in years previous to the crisis, the country's direction evaluation showed more positive than negative opinions. However, from that year on, this trend went downwards, and to date, there are more negative opinions about the country's direction than positive ones.



Specifically two periods recorded the most pessimistic opinions about the country's direction: all of 2010, (56% on average) when the global financial crisis left a scar on Mexican economy, and October 2014 (57%) when the country went through rough sociopolitical moments that will undoubtedly mark Enrique Peña Nieto's administration, such as Ayotzinapa rural teacher-college students' disappearance.

Other upheavals include the Tlatlaya massacre, the investigation into the “White House” owned by country’s First Lady, as well as the real estate properties of some of the President’s Office members, and the Mexico-Queretaro train bid termination.

The aforementioned suggests that Mexicans’ discontent with their country’s situation has multiple causes, which are more or less relevant depending on the country’s course in a given moment. According to citizens’ opinion on Ipsos’ polls, crime and poverty are, and have been, the most urgent problems to be solved in the country. Other recurring public agenda subjects, but with fewer mentions than the previous ones, are corruption, low wages, and unemployment.



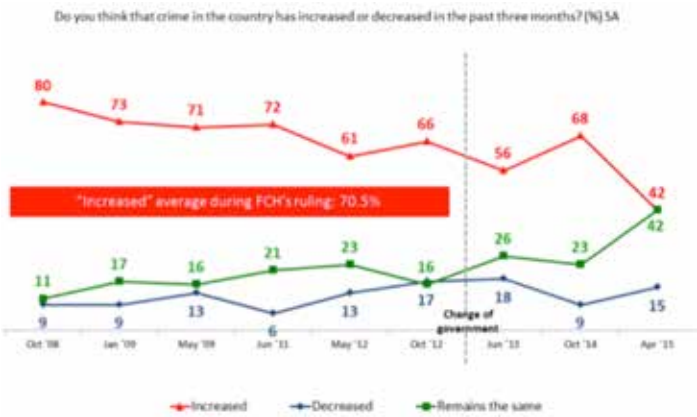
Therefore, in order to understand Mexicans’ discontent with the country’s current situation, it is worth analyzing opinions based on three factors: i) crime crisis, which fuels fear and uncertainty in people; ii) the political class putting ahead their personal interests and the high level of corruption, which makes us lose hope for a possible change; and iii) the country’s insufficient economic growth, which fails to improve the citizens’ quality of life.

People’s opinion on crime and violence should be analyzed first...

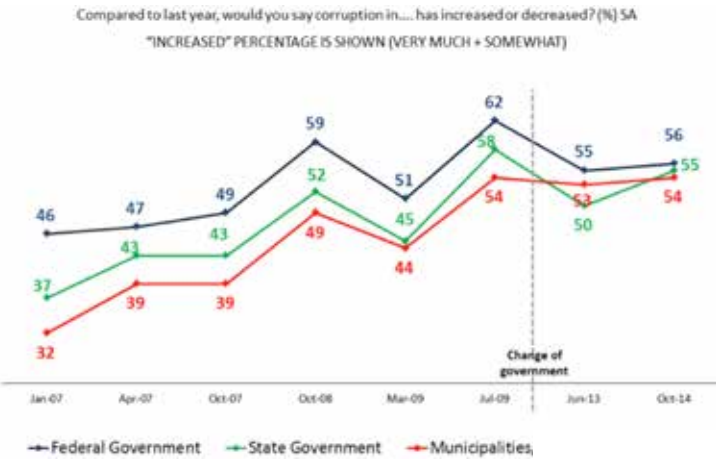
The war against organized crime –considered by some as “obsessive”– led by President Felipe Calderón caused violence outbreaks that made 71% of Mexicans to consider that the country’s crime rate was on the raise. By June 2013, six months after Peña Nieto’s administration started, this percentage fell to 56%. Although this figure is significantly lower than it was with the previous president, it is still worrisome, since more than half of the population think crime is still increasing. However, by October 2014, this figure went upwards again reaching 68%, a record similar to Calderón’s administration end.

These trends point out that public opinion gave Peña Nieto the benefit of the doubt regarding crime issues, maybe due to his campaign promises of withdrawing the Army from the streets and changing the crime-fight strategy. Peña’s ruling situation during his first year was bearable; nonetheless, Ayotzinapa’s and Tlatlaya’s cases laid on the table the perception on crime once more.

It is worth mentioning that in January, the Consejo Ciudadano para la Seguridad Publica y la Justicia Penal A.C. published the world’s most violent cities ranking, based on the number of first-degree murders committed for 100.000 inhabitants. Out of the 50 most violent cities, 10 are in Mexico: Acapulco ranks 3rd, behind San Pedro Sula in Honduras and Caracas in Venezuela. Other cities in the ranking include Culiacan (24th), Ciudad Juárez (27th), Ciudad Obregon (31st), Nuevo Laredo (34th), Victoria (4th), Chihuahua (43rd), Tijuana (45th), Toreon (48th), and Cuernavaca (50th).



Talking about crime and violence leads to talk about corruption and impunity, the second factor to be analyzed; two illnesses of the Mexican political class and citizens that have become partners with crime.



There are countless cases brought into the public eye about policemen, mayors, governors, and federal officers linked to organized crime, as well as cases involving public servants, whose wealth accumulation and real estate ownership puts into question the rightfulness of their actions.

Not to mention those who use public resources for their personal agenda, those who use classified information they have access to due to the public office they hold to get an economic benefit, and those who accept luxurious gifts from individuals in exchange for favoring a decision.

Ipsos' data show that the current perception on corruption growth is the same for the three government levels (56% Federal; 55% State; and 54% Municipal, with no significant differences among them). Nonetheless, it has not always been like that. In 2009, the Federal Government was more harshly punished by public opinion concerning corruption, followed by state and finally municipal governments.

This means that local level perception on corruption has increased more than at federal level, which can be the result of operations such as the "Michoacanazo" or those conducted in Chihuahua since 2009 by President Felipe Calderón, which

exposed corruption networks and local governments links with organized crime.

These corruption networks are responsible for these cases to remain unpunished, thus creating a vicious cycle that positions Mexico in a disgraceful place nationally. According to 2015 Global Impunity Index (*Índice Global de Impunidad 2015*) issued by *Universidad de las Américas de Puebla*, Mexico ranks second in impunity among 59 evaluated countries, just behind The Philippines.

The third factor to be analyzed is the economy. With 53.3 million of Mexicans living in poverty (45.5% from the total population in 2012),²⁰ the economic situation has been a recurrent topic in citizens' mind.

²⁰ CONEVAL, *Medición de la pobreza*, 2012.

Ipsos' polls show that in 2007, the year before to the global financial crisis, 57% of Mexicans considered that country's economic situation was worsening or remained just as bad. By 2009, when the crisis effects started to have an impact on Mexico, this figure reached 76% and remained so during 2010 and part of 2011. In the past two years, negative perception on the domestic economy percentage has been 68% on average, with a significant increase in October 2013, which overlaps with the Tax Reform bill, which was considered a dramatic setback on Mexicans' personal finances.

Disappointment: running into a stone wall... again?

Mexicans not only live in discontent due to country's political, economic, and social situation. They are also constantly disappointed by authorities: unfulfilled promises, the long-awaited change that never arrives; high expectations on every new government every year, which vanish as time passes by.

There are plenty of examples: 2000 political alternative raised a lot of expectations regarding a change in Mexico; however, Fox's administration was dull. Then came Felipe Calderón –the “president for employment”–, whose campaign promises about employment and crime fight were the two pending matters of his time in office, according to public opinion. Despite having heard promises for several years about strengthening the domestic market to achieve a sustained development, our economy still depends to a great extent on exporting.

The Mexican Moment was in the spotlight a couple of years ago, focusing on the prosperity that Mexico might have achieved if structural reforms were implemented. During Peña Nieto's early administration, the Pact for Mexico was signed, and a set of reforms were passed, from which we are still awaiting results.

The consequence is public opinion expressing being disappointed by the governing class and Ipsos' polls show such indicators. In safety matters, 80% of the population from the country's main cities thinks crime issues are beyond the government's hands. In other words, they doubt authorities are able to handle the situation; perhaps it is not a matter of incompetence, but a matter of willingness to face the political consequences that a strategy change in crime fight might bring.

On the other hand, in matters of corruption, 85% of the population claims a lack of political willingness to fight it. To wit, we do not think the Government and the political class are interested in investigating and punishing corruption, since they benefit from it. In that regard, to what extent is Peña's Anti-corruption Plan believable in public opinion's eyes?

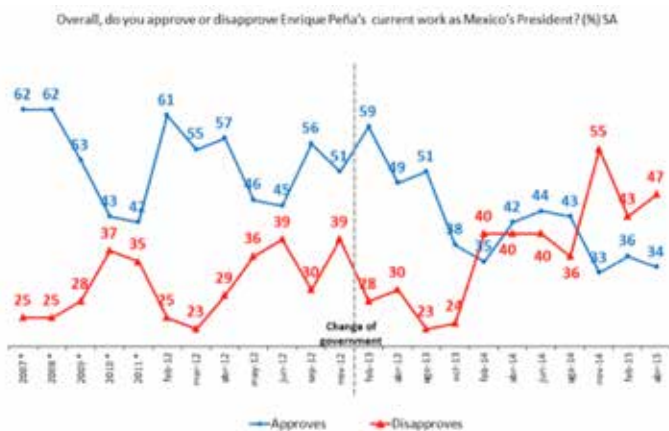
Finally, an improvement is not visible in the near future. Economy experts and analysts are cautious on their speculations regarding Mexico's growth expectations. Last April, the International Monetary Fund, which last April squared its forecast from 3.2% down to 3.0%.²¹ Public opinion is also pessimistic because 6 out of every 10 Mexicans expect the economy to worsen or to be as bad as usual for the rest of 2015.

Hence, public opinion shows discontent towards the country's current situation, but this is not new. It has remained so for several years, which can explain the pessimism towards the future. Data convey that citizens see few or no options for a change.

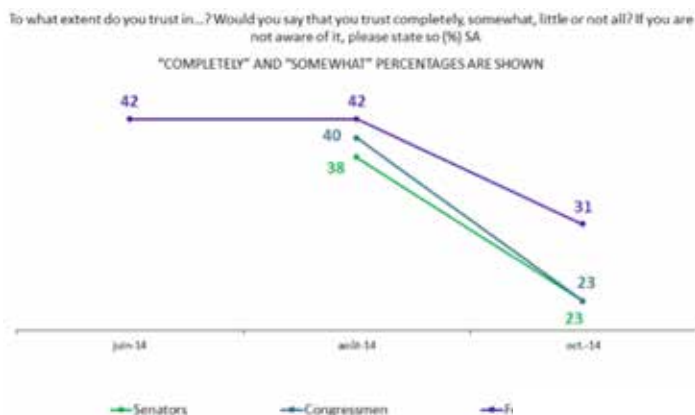
Distrust: credibility crisis in Mexico

Discontent and disappointment with the country's political class have generated a credibility crisis in Mexico. On the one hand, Ipsos' polls show that the President's acceptance rate has decreased by half in two years, considering his administration started with an acceptance of 59% and now is at 34% (April 2015).

²¹ Available at: <http://www.elfinanciero.com.mx/economia/fmi-recorta-de-a-prevision-de-crecimiento-para-mexico.html>



On the other hand, trust in the Legislative Power also dropped drastically over the past months. In 2014, congressmen went from 40% in August to 23% in October, and senators from 38% to 23% in the same period. As for the Judicial Power, trust dropped from 42% to 31% in those same months.



However, the increased distrust not only affects the three ruling powers, but other institutions as well: trust in decentralized Government agencies (including the Bank of Mexico, INEGI, IFAI, and INE) dropped from 52% to 47% on average between April and October 2014; while trust in State-owned companies (PEMEX and CFE) fell from 48% to 45% in the same period.

As for national security institutions, trust also dropped during 2014. Navy trust level went from 71% in April to 60% in October, Army's from 71% to 54% and trust in the Federal Police went from 48% in June to 35% in October of that same year.

Finally, trust in political parties dropped from 38% to 24% between August and October 2014.

Discontent, disappointment and distrust: are they infectious diseases?

There have been multiple debates about how this pessimistic context negatively impacts consumer's behavior and about how Mexicans tighten their expenses and change their consumption habits: purchase channels, frequency, formats, brands, etc.

Therefore, the distrust crisis of public institutions may impact the perception on the business sector in two ways: i) that distrust continues permeating and reaches the private sector or ii) that due to the distrust and uncertainty context of the public sector, trust in the private one increases.

Both scenarios pose a challenge for the business sector, since they directly affect companies' reputations. In the first scenario, they doubt companies since it is believed they are colluded with the government or that their success is the result of acting deviously; hence, all company's actions might lack credibility. The second scenario puts the private sector under the spotlight, which counterweights the scale, since expectations are raised on its contributions to the country and how they add value to the society.

Ipsos' data show a downward trend from 2010 to the first quarter of 2014 on the average image perception of different evaluated sectors,²² dropping from 56% in 2010 to 36% in March 2014. However, the average image increased in July 2014 and has been steady since then (around 42%).

This trend conveys that between 2010 and early 2014, public opinion condemned the business sector to a certain extent. However, stabilization achieved in the past months, meeting the social and political crisis previously discussed, suggests that, despite all the negative aspects of the context, public opinion acknowledges companies' efforts.

²² Automotive, banking, beer, insurance, investments, personal computers, pharmaceutical, restaurants, commerce, telecommunications, tobacco, wine and beverages, air travel, confectionery, processed goods, credit cards, fast foods, media, mining and carbonated soft drinks.

To sum up, both scenarios play a role and are dependent on context harshness; there will be times when social discontent will reach the private sector and some others when said sector will counterweight the scale for the public sector. Now more than ever, a proper management of companies' reputation is urgent within this distrust and low credibility context.

[The *Big* changes]

⟨ **B Y Enrique Esquer**
Ipsos Marketing ⟩

The crisis of confidence

Over the past few decades, people's disappointment towards their government has been increasingly perceived. Public opinion leans towards a democracy that performs poorly, which casts doubts on Mexican people's voice and representation. No better description to convey this feeling than writer Pedro Angel Palou's: "Today's Mexico is worse than last century's; society is rotten to the bone. Any mayor needs less than one year to become a millionaire. We live moments of social tension, violence, and utter hopelessness."²³

We cannot help but inquire which variables would have to be modified within our society in order to empower competent leaders. I'll mention the main issues that Mexican society must undoubtedly change if its Messiah is ever to arrive.

Education: This is the first thought that comes to mind once the topic is set on the table. Just a couple of statistical studies are enough to have an overview of our country's educational pillars: out of every 100 children who start elementary school, only 45 finish middle high-school. Of these, only 27% finish High School. From this percentage, 19.4% enter a higher education institution, according to what Mexico's Ministry of Education reported to the OECD. At the end, we regrettably have 13% of a generation who actually hold a Bachelor's degree.²⁴

Our national education model is based on a knowledge transmission process where a lecturer renders information to an audience, which passively receives it. Any great educational revolution must aim at training professionals for life, not just for work. Our system's lack of formal knowledge leaves behind the vast majority of our population, either because of the need to start working at an early age and contribute to the family income, a limited access to public education, or dismissing the importance of holding a formal degree.

These limitations converge in society and introduce in our democratic system a strong incidence of (wrongly) elected people through the vote of people who have had a limited opportunity to form themselves a conscience about its negative impact on the country, e.g., they may have a poorly cast vote.

²³ PALOU, Pedro
Ángel, *CNN interview after the publication of his book entitled: Poor country of mine* [online]. Available at: <http://mexico.cnn.com/nacional/2010/07/27/el-mexico-de-hoy-esta-peor-que-el-de-hace-100-anos-dice-pedro-angel-palou>

²⁴ OCDE, *Education at a Glance*, 2011.

In this dream, where the necessary efforts to have a better-educated population would be made, we would make decisions based on a sound judgment and would undoubtedly have a more intelligent market. Let's imagine then the amazing impact it would have on our democracy and our country's daily life transformation.

Participation: conformism is a noun derived from conformist: a person who conforms to accepted behavior or established practices, and it would be fair to add "especially when they are adverse or unfair".

Nothing proves better said demoralization than those occasions where the population can make "changes" in its government that momentarily bring hope to it; however, shortly after, these changes have a negative boomerang effect; since changes fail to become a reality, the "we are-back-to-where-we-started" phenomenon emerges.

According to OECD report, *How's Life 2013. Measuring Well-Being*, Mexicans' optimism has remained constant over the past few years. Data show our country as one of the happiest, with higher levels of satisfaction with our lives, even when the variables that measure our well-being (employment, education, health, safety, among others) ranking among the lowest in 8 out of 11 categories. Nonetheless, the same report points out that Mexico increased its life satisfaction from 55% to 70% in the period 2007-2012.

These facts pose the question: are we conformists? Do we find the half-empty glass enough? Apathy, discourage, indifference to injustice, impunity, and ineffectiveness have stalled our country in conformism.

Furthermore, we must consider the term "disinformation" within the equation. Apathy and lack of participation entail a habitual lack of interest in looking for information about political candidates, due to low performance perceived year after year. "It is pointless! They are all the same" is a statement that summarizes well average Mexican's stance regarding the search for information beyond mass media: TV, radio, newspapers, which not only are unilateral channels, but also have lost believability due to consecutive and unfortunate events casting doubts on the truthfulness they are supposed to have.

《INTERVIEW》

*Thus we arrive to the third most transcendental pillar of the changes we should make: **communication**. In the marketing field, it is well known that one must be particularly creative when designing effective communication in an environment where consumer is bombarded with hundreds of messages every minute in order to prevent a blockage caused by the excessive information received.*

This does not exclude public offices, which allocate the largest part of their communication budget is allocated to TV producing many repetitive, intrusive, and non-informing ads. These seldom address the public in their own vernacular and offer solutions that at best are relevant for people's daily life, but lack credibility and fail to earn their trust.

Over the past few years, social media efforts for driving leaders have become more relevant. Participation is a two-way path and users are free to express their opinion, which has marked a turning point on the way information is handled.

Nonetheless, action is still missing, e.g., actively talking and listening. It has been used as a slogan monger, a collection of followers and hashtags; it has been stripped from its communication channel essence, even when it has unlimited possibilities to foster contact and talking.

Social media's recent incursion into politics and in defining leaders who do not necessarily come from the political field has had the same degree of truthfulness than conventional print media. We must contribute with relevance and believability to it, get users involved and not just request for their support (or their vote). If this happens, there will be soon an effective word-of-mouth reaching non-users, which will become support for leaders people consider capable.

This chain does not end at not being informed or new communication strategies design. As long as most people's attitude is passive, we'll address mainly a society that is far from having a sound judgment that does not debate the information-generating ideas, and that fails to tell apart good from bad leaders. What are the chances for leaders who have barely stood out from the rest to have an impact on the whole country, if they do not get the Mexicans' support and they are competing against the highest spheres of power driving someone who could barely be called a leader, whose objectives overlook the much-desired-

by-Mexicans win-win situation, who does not contribute much to the country's development and keeps its stability in a mere desire and no action?

Finally, let's picture a scenario where these three domains – education, participation, and communication– have completely changed from the way they are currently performed in our country. Undoubtedly, the three elements are strongly linked and would provide us with a virtually ideal environment, where people would tend to be informed about those who are their leaders, would rate their actions and demand a good performance, or else they would take actions to switch them, give them follow-up, and introduce the necessary changes timely to put pressure and let the right people get power in order to get the expected well-being.

Culture as political criticism in Mexico

B Y Rafael Muñoz-González
Ipsos UU

On complaint, identification and trust...

Confidence, like art, never comes from having all the answers; it comes from being open to all the questions.

Earl Gray Stevens

The voice revealed

After having won the Oscar for Best Film at the 87th Academy Awards, Alejandro González Iñárritu said to 37.3 million people: "I just pray we can find and build the government we deserve."

Not an insignificant statement at this current moment. Through the past years, the country's social situation has worsened without excluding causes and people responsible.

The dissenting voice has become more powerful as discomfort, disapproval, and damage increase after each violent event, each disappearance, and each act of impunity. In an age of media "transparence", every effort to complain and/or demand finds a space on screens to have the chance to speak up, and specifically for this article's purposes, to convey a message full of aesthetics, within what we call cultural territory.

We could mention folk-pop singer Natalia Lafourcade's appearance singing a protest song around thousands of demonstrators bearing the hashtag #YoSoy132 in front of Televisa's (Mexico's main broadcaster) facilities.²⁵

Years later, in another setting and another context, beautiful designs and images with the 43 missing students' faces from a rural teachers' college are on Internet and social media, as well as on canvas and posters. I won't delve into this story. What we can observe in both examples is the artistic activity resource for criticism purposes, and they show its importance and ability to be adopted even when they are out of the mainstream artistic eye. At the end, the aesthetic experience as catharsis is a way to bear the unrest.

²⁵ As a result of the media approach of the rejection to candidate Enrique Peña Nieto's visit to a college in Mexico City in 2012.

In what regard is this subject of our interest, as we work in the consumption sphere? It is simple.

Because it is significant for people; because in our *equity*, we have words such as “responsibility” and “reputation”; because we are pursuing opportunities to be relevant in people’s lives, to be invited to live in them* (this premise is the base for Censydiam methodology, where the research objective is understanding people’s actual and daily drives to discover ways through which brand actions relevant for them can be generated). In that sense, “culture has reached a social visibility not seen before.”²⁶

* Premise for the Censydiam motivational model.

²⁶ NIVON BOLÁN, Eduardo. *Políticas culturales y agentes sociales*. Apuntes de políticas y gestión cultural.

Complaint: a narrative on discomfort

In what regard is this subject of our interest, as we work in the consumption sphere? It is simple.

Octavio Paz once said that poetry is the attempt to make the world fit to live in again. That being the case, the world is a rough, uncertain, and hopeless place. It may be; at least in Mexico, to a greater or lesser extent, we have experienced the three of those things. Therefore, poetry is a metaphor for aesthetics, capable of redeeming the world in front of us.

Mexico is in a moment when it is impossible not to see exposed in the media (normally alternative or digital media) social instability caused throughout past years by organized crime, the army’s and politicians’ impunity, abuse from institutions and several politicians.

The air we breathe in Mexican daily context reeks with annoyance and skepticism, frustration and concern. In a way, we are expecting the moment we see on the news or is spread on Internet to be close to our lives. Thus, discomfort is a latent constant; the complaint turns into a model beyond communication.

The complaint, within the daily nature defining it, is above all a communication attempt. It is an expression conveying annoyance as an implied expression about desire, solution, and justice. Sometimes the future comes from decisive actions that can be claimed as our own victories. “Happy endings”. Sometimes they are just the seed of hope.

Complaining is a means by which annoyance combines with the will of solving things through a narrative construction.

You may say that Mexicans complain a lot, but they barely do. This might be true; at the end, from this perspective, it is nothing less than the expression of our need to have a solution or satisfaction

²⁷ Term used by Walter Benjamin to describe the formation of an aspirational imaginary.

of our desires, and in this regard, as in a tale, generating a narrative construction about our damage is possible, and inside said narration, phantasmagoria²⁷ is generated from an illusion that can ease the discomfort.

This path is taken when channeling our narration through an aesthetic process, when taking it to an expression or artistic-cultural action. Right then, the product is able to reflect the impulses, not from the individual's or society's real life, but their imaginary. Tragedy and desire for justice are mixed in a narrative that is, at the end of the day, fantasy.

This aesthetic process isn't univocal to reiterate the existing damage, but to take it beyond, to a point further away and deeper where it can be solved in order to find peace.

This process bears uncertainty and disappointment, fighting loss, death, and violence, the inability to change, to let go. Telling a story implies bringing a lost drive back to life. As said by Walter Benjamin: the narrator's mission is not to reveal the plot secret, but to do it justice.

Why? Because at the end, those "stories" are the ones we relate to and we overcome our fears and damages with.

Identification: culture's duality

Undeniably, Mexicans are educated with a series of diverse, yet clearly defined heritage: indigenous cultures, the Spanish conquistador image, the miscegenation syncretism, back then, its French aspiration, and later the American one, the cacique, the avant-garde aesthetics from the 20th century, among others. For the purpose of our subject, I'd like to emphasize the latter as a critical example.

Criticism is implied within any society's political action framework, and the relationship between politics and aesthetics determines the particular sense of a cultural identity expression. In that regard, "the essential aesthetics role in the planning processes of modern States is pointed out [...] and it has been required, but not enough, in the Mexican State social construction."²⁸ Y dichas "narraciones" de nuestro devenir como nación, celebrada o criticada, representan un estandarte poderoso en la construcción de nuestra identidad como mexicanos modernos.

²⁸ NIVON BOLÁN, Eduardo, *op. cit.*

Said "stories" about our future as a nation, either praised or criticized, are a powerful cause in our identity building as modern Mexicans.

For example, Mexican muralism is brought up since it comes from the concern of expressing a radical, “revolutionary” and critical stand, regarding the political view on the State back then. Mexican muralism wasn’t a State initiative, but it came from the artists themselves who established the way they aesthetically define a response for the State.

However, it is worth mentioning that José Vasconcelos, an institutional leading figure, was crucial for the origin and promotion of said protest. At a crossroads of whether to condemn or praise Rivera’s, Siqueiros’ or Orozco’s revolt revelations, today we have their paintings in postcards, posters, t-shirts, exposed in touristic tours and mentioned in conversations with pride, as part of what aesthetically makes up Mexican imaginary. There’s nothing prefabricated on that. It was and still is part of the code of Mexicans’ emotional and symbolic heartbeat.

Therefore, said complaining stories are symbolic references to produce cultural policies. Both cultural institutions and cultural revolt convey a country’s political setting. In the first case, it involves a patriarchal guide for the cultural development through responsibilities and interventions.

Cultural revolt it is supposed to be a response to cultural policies – or any other kind. When there is a feeling of State abandonment, cultural protests apply a balm on those “flesh and blood” wounds, and they are simultaneously an “organization frame of our behavior.”²⁹

²⁹ *Id.*

We must be aware of the three pillars that support the productive model of modern societies: economy, technology, and politics. These become increasingly interdependent and interwoven.

In this framework, the role of cultural initiatives is better understood every day, and at the same time, their limitations are more and more evident.

Subject to Nestor García Canclini’s perspective about understanding cultural politics as “a set of interactions [...] in order to guide the symbolic development, satisfying cultural needs and having an agreement for a type or order or social change.”³⁰ The satisfaction of needs gives order as a damage restructure. At the end, the underling culture seeks a way to “point out or instill something to the public sector so that it is taken into account in said historical feature.”³¹ Thus the need is making the discomfort exist as a product recording a story, which we can relate to. It is a duality that emerges between the storyteller and the narrative object linked by the spiritual damage.

³⁰ *Id.*

³¹ COLOMBRES, Adolfo,
*Nuevo manual del
promotor cultural*, v.1.

³² *Id.*

Within protest and complaint, a memory construction is naturally integrated, since in this story there's a process of making us aware of the experience in which the damage is given a different meaning. "[The identity composition is equally related to memory shaping as a process of self-awareness.](#)" ³²

Trust: to give freedom

These cultural revolt actions beat in Mexicans' emotions driven by the need for releasing protest, not only about the events, but about the expression processes well.

³³ SIMMEL, Georg, *El concepto y la tragedia de la cultura*.

This "physical" expression of the spirit is a feature to meet its shielding and redeeming objective.³³ It must be independent from standards ruling it aesthetically or politically. Otherwise, it can even generate indifference and loathing.

The object must be reintegrated again to the social body's "mental mobility" and exceed said standards. For this purpose, there must always exist honesty in the message and its creation process, so that this story-object as "witness of the history" is not only true, but also that the involved parties are trustworthy.

When we talk about honesty, we always talk about trust, and within that field, we not only refer to politics or culture. Also we, as companies, are inside the economic and technological development context.

³⁴ GLOBAL @DVISOR WAVE 20, 2011.

Since 2011,³⁴ the percentage of people who deemed companies' social responsibility "very important" when selecting products or services was way above 70%, with a 33% that agreed the most relevant aspect to respect a company is "[its contribution to socioeconomic development of the place it operates.](#)"

³⁵ *Id.*

Nonetheless, these numbers convey what is ideal for Mexicans in this field. The figures stated by Edelman Trust Barometer ³⁵

convey a trust weakening that people around the world have for their governments and companies. According to last year's measuring mean, Mexico is above 50% of trust in companies, in a similar range to countries such as China and Singapore, but this rate is in decline.

³⁶ <https://www.youtube.com/watch?v=09eDlatXIB4>

Trust is important for companies since this is always conveyed in purchase intent (80%) or lower price awareness (54% higher willingness to pay more). These companies are increasingly recommended (68%) and they are even defended by people (40%) ³⁶

On the other hand, we know that according to people, 70% of the brands might disappear, which for them it is irrelevant since they don't contribute to their wellbeing.³⁷ Within the variables influencing their trust,³⁸ a relevant one is leadership; which can be represented by a company's CEO, without limiting that the same company bears a leading position.

³⁷ <https://www.youtube.com/watch?v=4yOKXH4GVww>

When it seemed as if the aspects related to identity, complaint and culture were beyond this subject, we take them again here as an aspect that companies tend to ignore, and when there's any, it is perceived it is just for tax-deduction purposes

³⁸ According to Edelman, besides leadership, there are sector, origin and type of company.

We notice that with the loss of trust in institutions and companies, the trend ³⁹ encourages to look for ways by which complaint can be expressed, to heal wounds, and especially, to materialize the historical evidence, so that damage has not been caused in vain. Collective work, cooperation with "actual people" becomes important to generate cultural objects building identification alternatives where whatever we call into question has no room, where the narration "gives us our due".

³⁹ IPSOS CENSYDIAM INSTITUTE, *Censydiam Consumer Trends, The Power in We*, 2014.

There are already some alternatives where brands are stimulated to materialize their solidarity through "random acts of kindness", where the tools to materialize these object narrations to give voice and reorganize this disagreement pulse are left in people's hands.

Providing material, spaces, transportation, and complaint dissemination through aesthetics is an untaken responsibility that would provide almost any brand with closeness and leadership because it offers the means to give it a new meaning as a sociocultural reality, which may be awful daily events.

Storytelling is a creative action that enables moving forward; allowing it to be told is significant for the storyteller, because, at the end, we have the opportunity of "making a worthier world in existence, closer to its meaning".⁴⁰

⁴⁰ SIMMEL, Georg, *op. cit.*

The new Mexican: Mexican 2.0

BY **Fernando Miño**
Ipsos Public Affairs

Mexico is undergoing a transformation

In the past 30 years, not only the political and economic arenas have changed, but so have Mexican society and culture; either because of the country's current matters or global trends.

Today we can notice that, just as in other countries, although Mexico has a democratic system, the population is not always involved in said system since most of the times the benefits from this system are not evident.

Likewise, there is greater focus and reaction about current problems; however, time and focus devoted by society to each one of them is limited, as the way of calling political parties and companies providing regularly consumed products or services to account.

Although it is possible to assert this transformation period is not caused by one specific factor, but several, we can talk about a transformation phase that has not come to an end yet and will profoundly impact the way Mexican society, hence Mexicans — Mexicans 2.0—, will face the still emerging 21st century.

Between recession, democracy... and distrust

According to official figures, slightly above 60% of Mexico's population is younger than 35 years old, meaning these people were born in 1980 at the earliest.

This is an interesting benchmark because, based on this, it is possible to state that these people grew up in the years defined by many recessions in Mexico; e.g., the debt crisis in the 80's or the tequila crisis during the 90's.

In the same regard, as stated in Mexico's National Development Plan 2013–2018 issued by the Federal Government, annual growth of GDP in Mexico between 1981 and 2011 has been close to 2.4%, which clearly has been insufficient to improve the life

quality of a population where approximately 50% lives in poor conditions. GDP growth figures between 2011 and 2015 have no significant difference against the aforementioned period.

Another important aspect related to these people's age is associated with the country's democratic transition. For the first time in 70 years, in the year 2000, Mexico voted for a political party different from the official party, e.g., the Institutional Revolutionary Party (PRI), when Vicente Fox, the right-wing National Action Party (PAN) candidate, became president.

Although some Mexicans were able to vote back then for the first time, the democratic transition to date is not an alien element to this group of people, overall, diverging considerably from past generations' experiences, when the political power alternation did not exist.

All the above discussed factors might be the origin of some phenomena lately identified in studies conducted by Ipsos Mexico. On the one hand, we observe that this Mexican 2.0 shows, to a lesser extent, ties or attachment to political parties; on the other hand, this Mexican deeply distrusts government institutions.

Regarding the first aspect, we have found out that people who were born in the 80's have fewer ties to political parties at all government levels. Based on Ipsos' data, it is possible to identify there is a larger amount of people who claim to be any given political party's supporter among the 30 year-old-and-older segment. On the other hand, within the 18-29-year-old population segment, we can observe there is no clear affinity with any political party.

Concerning the second phenomenon, based on data collected by Ipsos as well, it is possible to observe there is a strong overall disapproval, not only towards the President, but also towards virtually almost every public institution, whether on the judicial, legislative or executive branch. Since the PRI government retook office, we can point out two moments where the approval given to the President and the trust in institutions was clearly affected. In 2013, the structural reforms passing, especially the tax reform; in 2014, the tragedy of Ayotzinapa's missing teacher-trainees.

Hypothetically, it would be interesting to inquire whether the combination of having a population who grew up during the different recessions, leading to lack of opportunities, unemployment, inflation, etc., along with a political transition and a more developed institutional democracy in the country over the past years, is causing a distrust in State-owned institutions and, particularly, in Mexico's democratic system.

With more information, but not better informed

⟨INTERVIEW⟩

Another phenomenon, while it is truly not limited to Mexicans 2.0, it is associated with the way people get informed and how they communicate. From data collected periodically by Ipsos nationwide, it is possible to observe that the older people are the lower the use of e-media. In other words, people over than 35 years old use less frequently digital media to stay connected. Although e-mail and Internet are pretty widely used to date, social media, blogs, Twitter or Facebook is statistically used to a greater extent by the under-35-year-old segment.

This difference seems to be irrelevant; nonetheless, in deep analysis, we observe that, according to Mexicans 2.0, information has become an essential element, either as receivers of what the media broadcast (e.g., sports, politics, economy, or arts), or senders through social media.

Concerning the last aspect, for a few years now and as noted in many countries around the world, social media have been an important channel for voicing complaints. In 2012, a group exceeding 100 students started a movement aimed at raising criticism and awareness prior to the presidential election that same year. A few months ago, social media also played a major role in the organization of students who rejected the changes made to the syllabus of the National Polytechnic Institute (IPN). Recently, it is easy to find news, information or all type of “memes” even, which are spread through social media, associated with controversies involving corruption or human rights violations, just to name a few.

Although this phenomenon also takes place in other countries, Mexico still needs prevalence on relevant matters in social media and Internet, as these movements do not last enough. In that regard, it is worth pointing out that any piece of information creating impact on Mexicans cools down in short time due to further news that draw Mexicans 2.0's attention.

Mexicans 2.0 as consumers and citizens

Another outstanding aspect about this new Mexican 2.0 is that, despite the population's concerns on current matters, this individual claims to be happy and satisfied with his life. According to a study published by the OECD, despite working more (2226

working hours a year) and earning less (\$12850 USD a year per household) than the average in the rest of the 35 countries composing said organization (1765 working hours and \$23938 USD a year per household), Mexicans consider themselves more satisfied with their lives, according to OECD Better Life Index.

Mexican's satisfaction also can be transferred to two completely different fields, yet associated with each other, since we talk about rewarding or punishing in both: regularly consumed goods and services and country's political system. On the one hand, we observe that, more often than not, Mexico's consumers are satisfied with the service or product received from their providers, even if they sometimes mention the quality is not the best. It is worth noting that this occurs in spite of having other options on the market or that goods and products are more expensive than the competitors'. Setting aside some factors, such as opinions on social media or problems to get mobility, Mexico's consumers are not interested in making further research about products and services, so that, if the products or services they usually consume do not meet their expectations, they stop consuming them.

On the other hand, this pattern can also be observed in the political context. Despite people overall mention a disillusionment towards the political system and institutions, when it comes to electing candidates for popular-election positions, they keep rooting for the status quo in most cases. This was confirmed with the results in the recent legislative election in July 7th, 2015, where the PRI won most of the seats, along with its allies (PVEM and PANAL), as well as winning in 5 out of 9 states in governorship elections.

In other words, Mexicans 2.0 seems not to have among their options rewarding or punishing political parties based on the results given to citizens, at least, not consistently. This fact, along with the fact of not having strong ties to a political party, is translated into indifference or apathy towards democracy.

Conclusions

From the three arguments explained above, we conclude that Mexicans 2.0 are satisfied with their lives and informed about what surrounds them. However, they are also fully informed entities, though a short time, and they distrust the political and economic systems (not without reason). They do neither reward nor punish companies or their country's political system, either through the products or services they consume or the government they elect.

Notwithstanding the aforementioned, I would like to point out that some signs of a culture of rewarding or punishing political parties and/or candidates are envisaged. In the latest elections, in the state of Nuevo León, an independent candidate was elected governor, a thing that had never occurred. Likewise, there were other independent candidates who were elected mayors or deputies in Sinaloa, Michoacán, Morelos, and Jalisco. Although these citizens' actions are very limited in scale, they might be the beginning of a new stage in the country's democratic life, where politicians and political parties are accountable to citizens, since they work for them.

「Mexico: brain seedbed and drain」

《**B Y Isaac Pérez Zúñiga**
Ipsos Mexico Human Resources》

Communications and mobility today

Modern life is full of changes and movement. Scientific and technological breakthroughs demand faster answers. Information flows instantly through worldwide communication networks. Knowing we live in a globalized world, where we are interconnected through different media and where geographical barriers are no longer a restriction for people's communication and interaction around the world, is no news.

Scientific and technological breakthroughs have not only changed our daily life, but also influenced the way we conduct business at places that were geographically unreachable before. Of course, the consequences in different social life spheres can be clearly perceived.

Mobility goes beyond merely voice, video, and data transmission. People migration around the world has also arisen, either for studying, working, or simply experiencing life in another country.

For Mexico, this too is a reality. Mexican migration to other countries is nothing new; it has actually been observed in the past few decades.

Better-life expectation, curiosity about discovering new habits and traditions, more appealing school and work offers, and the decrease in talent-luring local sources have combined to create something called brain drain, or formally speaking, Highly-Qualified People Migration. Brain drain is nothing but students' and professionals' mobility to other world regions in order to conduct postgraduate studies, research projects, and contributions to different institutions.

Brain drain in Mexico

Around 2005, a Talent Network, fostered by the Ministry of Foreign Affairs, the National Science and Technology Council, the Institute for Mexicans Abroad, and the United States-Mexico Foundation for Science, was created in Mexico not only to

foster international mobility in professionals and highly-qualified people, but also to set return and repatriation policies in order to encourage people outside the country to rejoin academic institutions, research centers, and private companies.

According to the Center for Research on North America, Mexico ranks 4th in science, technology, and art talent exportation. On the other hand, the OECD states that Mexico ranks 7th among the countries with the highest talent mobility.

This is consistent with figures released by the “Mexico, the Americas, and the World 2010-2013” survey, conducted by the Center for Research and Teaching in Economics. According to the survey, 42% of respondents were planning to study, work, or live abroad. The United States, Canada, Brazil, Germany, and other European countries were the main destinations.

The first impression

Criminality, corruption, and lack of economic and academic incentives were mentioned as the main reasons for wanting to emigrate from Mexico. At first sight, it might seem a very striking reality, issued from life quality and conditions in several parts of Mexico

It is also true that many of these economic, social, and cultural problems afflict not only Mexico, but also other Latin America countries. We might analyze brain drain from a pessimist approach, where we lose great minds, who choose to leave their origin and roots behind to seek a new life opportunity, from which few of them come back to find good benefits and work, economic, academic, and life quality opportunities.

Mexico as brain seedbed

It is no coincidence that foreign institutions are willing to receive Mexican citizens. These people are invited to emigrate from the country for very valuable reasons. One of these reasons is the quality of their preparation in science and technology.

After hard study hours at college, several graduate students get a very competitive profile according to international standards, which makes institutions willing to invest in them in order to profit from the knowledge and experience they have gained for actual contributions to research and development centers. When a student or professional decides to leave Mexico, she gets into a highly demanding competition and comparison against other candidates from North America, Asia, and Europe.

They live together every day, cooperating and learning from them, but also contributing from their own perspective. Our professionals emigrate from Mexico to prove their high level of knowledge and skills gained and developed in Mexico.

A need from the receiving country must exist for Mexican brains to get out to the world. Otherwise, the phenomenon would decrease. The continuous search for Mexican talent makes evident that students' quality increases according to large multinational institutions requirements.

Likewise, Mexican brains migration abroad is the result of efforts conducted by institutions, such as the National Science and Technology Council, which year after year seeks the professionals' training aimed at science and technology progress. It is not a search conducted exclusively from outwards. Our institutions have decided it is high time to export out talent abroad.

The presence of highly qualified Mexican professionals worldwide is the result of many national and international institutions' efforts to take advantage of the whole preparation they have received throughout their schooling and working years.

As evidence, in the last 14 years, according to the National Survey on Occupation and Employment, conducted by the National Institute of Statistics and Geography, Mexico has exported over 20,000 PhD graduates to the United States alone.

Brain drain or exportation

Mexico is effectively a brain seedbed satisfying the conditions to create professionals during their education and development stage. It would be illogical to think that the seeds will remain always in the same place where they were seeded. Indeed, once the professionals have finished their education, they are ready to fly away to other countries, other regions. Mexico certainly loses the knowledge and expertise acquired during their education. However, this does not mean the effort has been in vain.

We can consider brain mobility as an export action rather than a loss. We can consider that Mexican brains who decide to leave the country do so looking for better personal and working development conditions. Indeed, we could, but we can also consider that professionals who have emigrated, do so to bring our highly qualified professional profile to other places in the world.

Apparently, Mexico does not get any benefit from their professional emigration. And maybe it does not get any immediate and direct economic benefits; however, there is a positive consequence from brain drain with indirect benefits for the country.

One of the economic advantages is the remittances from emigrants. Mexican citizens who decide to live abroad do not break completely family bonds. This includes their economic responsibility. In 2014, money inflow in Mexico from remittances was around US \$23,643 million, according to the Banco de México figures, at the end of that year.

Also, Mexican citizens staying abroad imply Mexican habits and traditions influence other parts of the world. Latin American countries, including Mexico, are characterized by, among other things, generating and keeping bonds with other people. This way, Mexican traditions have reached corners of the world unimaginable before. This also favors Mexican products and services positioning abroad, encouraging consumption of Mexican culture-related goods and services.

Camelia Tigau, researcher from the Center for Research on North America who has focused on Mexican brain drain, states there is a strong academic impact created by said phenomenon on academic programs updating, work and social network creation, and brain repatriation programs to receive those who chose at some point to look for opportunities around the world.

Indeed, there is much left to make Mexico not only a brain seedbed, but also a fertile land where the fruits of its professionals may be reaped.

「Consequences」



Using social media in Mexico

B Y Lina Fragoso & Guillermo Hoffmann
Ipsos Marketing

As it occurs in Latin America and the rest of the world, social media in Mexico are part of most people's daily life at an increasing rate and can be used as information search tool, to encourage social relationships, or even as advertising means.

53% of Mexico's 112.3 million inhabitants have Internet access. Of this, use social media even more than information search and e-mail while watching TV. The activities carried out through the so-called "second screen" include sending messages via Twitter to discuss the shows they watch on TV.⁴¹

⁴¹ Interactive Advertising Bureau (IAB), México.

Almost every Internet user has been using a social network for more than 4 years; from these users, 5 out of 10 are single and this same number of users are college graduates and/or post graduates.⁴²

⁴² Study in Digital Marketing and Social Media, 2014.

Mexico ranks tenth worldwide in time spent in social media posting pictures, sending messages to their contacts and watching videos.

Compared to Latin America, Mexico is the second country with most social media users, just after Brazil. Globally, it is the 5th country with most Facebook users, having more than 60% of them in an 18-34 years old range, being females the dominating gender with 52%.

⁴³ AMIPCI, *Estudio sobre los hábitos de los usuarios de Internet en México 2014, 2015*.

Mexicans invest on average 5 hours and a half per day,⁴³ either playing the role of an observer of his surroundings in the virtual world or being an actor expressing what he does, thinks, likes and recommends, or what he hates or what dissatisfies him; we even see those who show a fake reality. Some studies show that a high percentage of social media users spends more money after interacting with brands via Twitter and Facebook.⁴⁴

⁴⁴ PwC, *Total Retail 2015: Retailers and the age of disruption*, 2015.

Resulting from digital marketing strategies, Internet users do not only satisfy their need to know more about the brands or products, but they also want to be heard when they have positive and negative experiences; the difference is that a bad experience has a huge impact on a brand's reputation.

From the 500 largest companies in Mexico (according to a list published by Expansión magazine in 2014), 8 out of 10 of them

use social media actively, Facebook and Twitter being the social networks with the highest number of audience and interaction.

In order to make the most out of social media in Mexico's digital marketing campaign, we must understand the market and country's current situation to get brand's engagement.

Content creation conveying simplicity, originality, relevance, and a stressed emotional stimulation will make social media users relate immediately to the brand, product, or service constantly supported by the permanent interaction with the audience, evoking fun and amusement.

Visibility or mass reach, ease to create empathy, detection of needs for improvement, loyalty, low-cost positioning, and customized service are some of the social media benefits in a well-structured, and especially, well-conducted digital marketing campaign. (Mexico's beer and beverage industry is the audience leader on Facebook, while airlines are so on Twitter.)

It is important that any digital marketing campaign takes into account the following aspects:

- Communication must engage in virtual, but actual dialogue
- Brands' future is complemented by social media: "word of mouth" is quickly becoming "word of finger"
- Quality is "given" in the strategy of any product or service and "differentiation" is directly associated with the experience given by brands and products, instead of their physical features.
- "Values and certainties consumers can't find in their environment are sought in brands or products purchased and used."⁴⁵

⁴⁵ Ipsos, *Conectando con el nuevo consumidor* (Connecting with the new consumer).

While the specific importance of Twitter lies on followers' quality, Facebook relies on relationships established. Both social networks totally complement each other and are designed to reach a final objective: get potential customers and preserve the loyalty of those already consolidated.

Talking about the type of information shared in social media, Facebook is a social vehicle allowing to connect emotional aspects with users' most personal opinion. As for Twitter, it is a mean of communication where events and news are shared. Besides, it is used as a forum to express good or bad opinions about a product, service, or experience.

Whichever the digital platform they prefer to "interconnect" with the world, we must not ignore they are operated by people, and

that there's a big responsibility for the management of accounts or profiles; that's where data protection takes a high relevance.

The profile or "digital individual" is completely composed of personal information. Therefore, its protection is regarded as a human right. Whether the previously exposed fact is known or not, Mexicans feel "safe" when sharing their information. 47% of interviewees from the Study on Digital Marketing and Social Media in Mexico admits not having read the Privacy Notice before providing their personal information online.

Privacy is not an irrelevant matter. In recent years, Facebook has been at the forefront compared to Twitter, especially because of the implementation of new options that let users decide whether to make "public" their personal information, which is an aspect that Twitter hasn't completely developed.

It is well known that the average Mexican reads 2 books in his whole life, and that 70% of the total population reads the same amount as before or less. Chances are that any legal guideline, such as privacy policies of websites, will be overlooked. In order to start posting immediately, people just click on "yes" to the privacy conditions without reading the entire section. There's undoubtedly a long way to go for raising awareness on the exposed vulnerability regarding information shared on their wall or status.

Social media presence is a phenomenon that is here to stay, allowing interrelationships and contact with people. But how can we determine the rational use or overuse of social media?

It is believed that new generations face different mindsets or "psychopathological conditions". Therefore, spending too much time on Internet isn't necessarily seen as an addiction.

Social media overuse isn't recognized as an addiction or disease yet. However, there are clinics around the world specialized in controlling this disorder, considered a social problem affecting almost 40% of Internet users.

What are the symptoms that an addict to social media may show? The following is a list of them:

- Checking Facebook on a daily basis, several times a day, the whole day
- Sharing everything through the social network, and being able of sharing, advertising, marketing, or spreading personal, work or social information.

- Updating frequently their status, profile, pictures, etc., as well as tagging acquaintances and friends to receive comments
- Two or more rest hours have been cut off
- A few hours have gone by before realizing they haven't done anything else apart from being on Facebook, Twitter, Instagram, YouTube, among others
- 18% of the so-called "addicts", most of them under 25 years old, can be offline barely for a couple hours.

The list of social media use advantages and disadvantages is quite long. The most relevant aspects are listed below.

Advantages:

- Social media have a privileged position among the different areas of our lives: professional networking and making useful relationships.
- The game rules of both marketing and advertising have changed and evolved to such an extent that they have taken over the Internet; it "hooks" people because of how easily creative communicating and drawing attention is, and especially, because it is a matter of being in the right place, at all time. Costs are significantly reduced by focusing on efforts targeted to a specific public / consumers / readers / Internet user segment or as people "should be or want" to be called nowadays.
- Social media fulfill useful functions concerning citizen link and intermediary, where people can get information about local news, and even get the best way to avoid traffic in real time.

Disadvantages:

- There's the possibility to become addict to social media.
- Privacy loss is a huge flaw of blogs, since care is ignored regarding delicate issues and the consequences from sharing personal matters which any person can see. This may become a very serious issue about identity theft or slander.
- 20% of students using Facebook have a poor school performance, while 79% says this is untrue.
- Young users make more depressant comments than positive ones.
- Social media paradox: it encourages physical social isolation in exchange of virtual relationships with a larger number of people.

In another line of thought, but not forgetting we are talking about use and misuse of social media, according to Conapred (Mexico's National Council to Prevent Discrimination), in México 7 out of 10 people have been discriminated or labeled based on

prejudices about social status, sexual orientation, or race.

Since social media is one of the main means to send messages, Conapred launches campaigns through such means to make users aware of the need of not putting labels on people, as discrimination and “cyber bullying” constitute the most serious current issues in Mexico’s society.

To sum up, social media are here to make communication among people easy, enrich our culture through communication to different parts of the world, as well as to reduce long distances with our relatives or acquaintances.

It is necessary to use social media in the right way to minimize the unfortunately rising daily dependence, which may be added to the already existing addiction problems among the young population.

Out-of-museum expressions

BY María Elena De Villa & Claudia Pallares

Ipsos UU

〈Folk art expressions〉

If we talk about art, museums are most likely to be the first thing that comes to our minds. However, there are other sources of inspiration, transforming how we look at cities and becoming alternative conveyors of folk art: streets, house or buildings facades, tunnel walls or bridges, boulevards or squares are full with artistic expressions of what is happening in our country.

We can observe that, outside museums, artistic expressions question Mexican society and politics; from graffiti to embroidery of stories on muslin portraying the most relevant events happening every day.

The gradual outbreak of violence and other failures in the country are difficult to hide, to such an extent that the UN Special Rapporteur on Torture, Juan Méndez, published a report stating that torture is common in Mexico.

In order to prevent this to cause much uproar, there has been many an attempt to deny it. However, several movements have appeared, such as an initiative called *Manifiesto Mx*, whose objective originates in its name (from Latin *manifestum*, meaning visible or evident). This organization has painted several walls in the city since February, 2015.

Murals come to life thanks to a group of 10 artists who have invested their time and talent to capture their ideas about the country in the streets. Italy, Argentina, USA, Colombia, and Mexico have come together to protest, reflect on, and propose using art.

Among the most important artists who have participated in this initiative is Favio Martínez, who can be easily recognized by his so bright colors filling up every space they cover. He lived in the USA until he was ten years old and, when he got back to Mexico, where he was amazed by its folklore, reason why the combination of his works enlivens their fantasy and surreal characters.



However, there are other artists working from different trenches. Some of them with a given structure and others with structures of their own: graffiti is a way of expression that responds to the country's differences and difficulties, and tries to portray them.

The truth is it isn't sufficiently spread and supported. Therefore, as citizens keen for cultural knowledge, we must be attentive to what is going on.



《INTERVIEW》

Nowadays museums look for collections that convey more accurately what occurs in cities throughout the country. For example, the Museo Franz Mayer is housing an important exhibition on the evolution of bicycles through history. This is relevant given the current growth in the country's big cities of bicycle use for transportation.

Another way of expression, less broad but not less relevant in artistic quality, is embroidery, which attempts to evoke memories by rescuing stories about missing people or casualties resulting from violence in the country. This movement intends to represent on muslin what is happening in people's lives. This is done with motifs that bear a symbolic meaning that has been transmitted across generations.

This is retaken by city dwellers assuming its ownership as a protest instrument to express what they dislike about violence. We can witness this every weekend in Coyoacán square thanks to the young people who found in embroidery a way to express current Mexican emotions.

Fashion design is also an expression that has significantly grown. Haute-couture has taken on cotton and linen fabrics embroidered by women from entities where this handcraft is highly relevant, such as Oaxaca, Chiapas and Istmo de Tehuantepec.

This trend to turn folk art more accessible for regular people, given the lack of willingness to pay for museum art, helps Mexicans gain more knowledge about their own culture. Embroidery is an expression that has been transmitted from one generation to the other. It has been ignored and belittled for many years, and only had been valued by foreigners. Just over a decade ago, it was rescued by different Mexican groups to raise its importance in our culture and its recognition as folk art.



Some other movements have gained greater strength through time. In their own spaces, they try to portray Mexican culture, like ZONA MACO has been doing since 2002 (in Monterrey) and 2004 (in Mexico City). ZONA MACO now has invited foreign artists to prove that folk art is an expression where all cultures coexist. This movement starts from the need to expand the art market. It has become a contemporary art landmark throughout Latin America gathering proposals from galleries, collectors, publishing houses, and cultural institutions.

Within this fusion of art and tradition, we find the aim to rescue of cultural traditions that had been replaced by foreign ones, as it occurs with Halloween, which we try today to combine with the typical Mexican Day of the Dead celebration.

Subsequently, in Mexican homes during the last week of October and the first week of November, we find decorations with shrines (pictures of dead relatives combined with food and beverages, what they liked, skulls or "catrinas" on perforated colored paper) coexisting with ghosts, witches, Frankenstein, Dracula, spider webs and mummies, products acquired from the USA.

This is how folk art produces constant syncretism as a result of the cultural diversity we see every day.

「Mexico: a marketing paradise?」

《BY Constanza Segura
Ipsos Connect》

For a foreigner, arriving to Mexico means opening his eyes to a reality of countless possibilities; a country that enjoys imposing landscapes and breathtaking images. Its rooted traditions, gastronomy, the warmth of its people and music, represent, among many elements, the richness of its land. Mexico does not only possess a unique cultural heritage, but is a natural reference for regional development, a market where thousands of domestic and International brands coalesce to offer consumers different alternatives to satisfy their needs.

In a competitive market, working to build and strengthen a brand is fundamental. That does not mean only to simply offer products that provide basic benefits, but to present a different and particularly relevant proposal for consumers.

In a market that has such a wide offer of products and services, the backup of a brand is vital within the equation. In its definition, the concept of credibility comprises both trust and awareness, which allow individuals to believe in the information they receive from a given source. That becomes a value judgment in certain circumstances or messages. The perception of truth and honesty apparently has a proportional impact in the construction of credibility.

Though theoretical definitions may be associated with human relationships, the same definitions could be applied to the relationship between consumers and brands. The credibility of brands is a key factor for market performance.

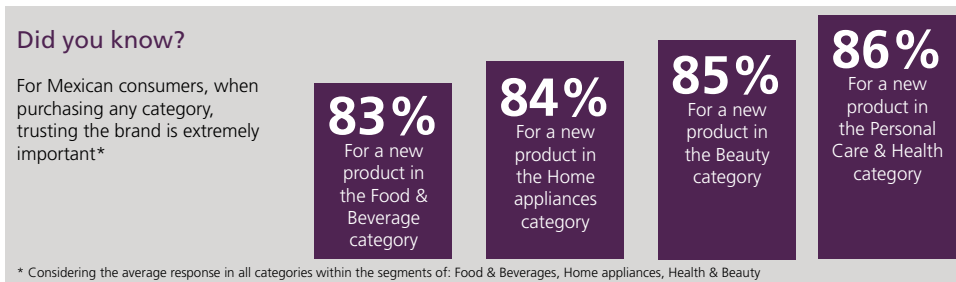
Thanks to technological advances and to the diversity of means through which a brand communicates its benefits, consumers have become more informed, critical, and demanding. Before daring to try a brand, Mexican consumers, in most cases, look for information on its reputation.

This is how word of mouth, web sites, specialized pages and social networks become information sources on the product, its experience and benefits. Word of mouth particularly, in the form of recommendations of friends and relatives, is one of the

most influential sources (84% of respondents in 58 countries considered it as the most reliable information source, according to Nielsen Global Trust in Advertising and Brand Messages in 2013).

⁴⁶ http://www.brandsparkmosttrusted.com/2014winners_mex_esp.html

Therefore, trust is fundamental. In a recent study conducted by the company Brand Spark, it was determined that trust has an impact on 80% of buyers choosing among products in different consumption categories: ⁴⁶



In an increasingly competitive setting, with a better-informed consumer that starts to follow the care, health, and social responsibility trends, it is fundamental for a brand to explore new ways that allow it to build or keep its credibility. Integrity, quality, consistency, and truth are the values that could support trust in brands.

Advertising is a way to approach consumers. Communication campaigns allow brands to tell the audience a story in which brands play the main role, but seeking to have resonance on the reality of consumers.

However, building trust and credibility and, hence, transcending is not always an easy task, since consumers are not always optimistic about their context. Only after 13 months of accumulating indicators in the red, the Consumer Trust Index recorded three consecutive growths, by the end of 2014 and at the beginning of this year. At the same time, the downward trend of the previous period was reverted in the short term. An optimistic consumer has a positive impact on the country's economy. ⁴⁷

⁴⁷ <http://eleconomista.com.mx/finanzas-publicas/2015/02/06/optimismo-consumidores-reputa-inicio-2015>

What do Mexican consumers believe in?

Within an environment of political and social problems, Mexicans have lost faith in government institutions that have low levels of approval. However, companies enjoy much better consumer

perceptions, since they are seen as organizations that support the development of society through their programs of social responsibility.

Though recently the trust in Mexican companies abroad has suffered a decrease, probably related to the political, economic, and social reality of the country in the last few years, the credibility of domestic firms exceeds by far (72%) the global mean (57%) for the indicator (according to Edelman Trust Barometer).

This is so because brand trust and credibility have considerable influence on the decision making process of consumers. They are factors that allow brands to establish links with consumers, on the basis of the values they share. They strengthen their positioning, and give them better chances of being selected during the shopping process. Trust is a synonym of reliability and it is the certainty of obtaining exactly what the brand presumes to offer.

All along the different measurements of brand health, in different categories and with different targets, we have found that the Mexican consumer is quite involved with brand selection. Consequently, actions undertaken to build a brand do pay off, because brands do matter for consumers.

How to build credibility?

Building brand credibility is a process that requires time and perseverance. And, as in the case of personal relations, building trust is based on how much we fulfill what we promise. Hence, it is also fundamental for brands to meet the expectations they create. This will require, in some cases, to highlight all features that differentiate a brand from its competitors and that allow it to stand out, making sure that said features are relevant for consumers.

It is also crucial to identify the target group on which the brand will focus its efforts and know the way they should be approached by identifying the values they share, their needs and worries. We must listen to the consumer, pay attention to everything he wants to say, to his ideals and purposes, frustrations and wishes. This would be a way to find insights, values, and interests that will help brands determine the activities or means that are more effective in reaching consumers.

In this equation, innovation plays a main role, particularly within a setting where the available resources might be limited.

The main objective of innovation is to optimize resources and processes for increasing competition. The companies must look for alternatives to overcome obstacles, foresee market needs, prioritize the generation of added value and, in many cases, transform themselves, not only making reference to products, but to human beings.

Innovation also allows breaking paradigms, thinking out of the box, and setting new goals. In most cases, technology enables innovation, increasing the effectiveness of processes, but also supporting development and research.

A part of the innovation reflected in communications between brands and consumers might become tangible thanks to the different media through which brands can today be in contact with their consumers. Their presence in social media, Internet, and other media, has quickly joined the traditional media. Though television remains the media with the highest remembrance, the growth of digital media consumption is increasing, even among those segments where expectations might be lower, such as housewives (according to EGM Ipsos Media Mexico).

It is worth pointing out the considerable growth experienced by Internet search engines (72%) that have already surpassed traditional means in terms of certainty (64%). The technological development effects in this area are already visible.⁴⁸

⁴⁸ <http://www.altonivel.com.mx/49164-empresas-mexicanas-sumidas-en-la-desconfianza-global.html>

Beyond being a simple trend, presence in social media is a key asset to establish relationships with consumers. This is a serious matter that, as a single message can trigger an extremely positive or negative perception on a person, brand or product. This is why it is important to take into account the responsibility that companies assume when they publish content in media. Contents must be in line with the brand strategy, objectives, and experience, and consistent with other elements that are part of the same campaign.

Reliability, credibility, and value are key elements for the growth of brands. On markets that display complex economic, political, and social conditions, building strong brands might be the answer to guarantee their growth.

⁴⁹ FUENTES: Merca 2.0, potencialpymes.com, INEGI, forbes.com.mx, altonivel.com.mx, marcasdeconfianza.mx, *Edelman Trust Barometer*, PWC España.

Mexico offers multiple possibilities for consumers, and for brands, whether renowned or new brands, reliable or not reliable, domestic or foreign brands, innovative or conservative, familiar or not well known. There are brands for every type of consumer, brands to satisfy different needs. Mexico represents diversity and it is marketing paradise!⁴⁹

Nevertheless, how to entice consumers?

BY **Alberto Mena & Aldo Casillas**
Ipsos UU

The Multicolor Mexican

We will use the Censydiam approach through primary drivers to understand modern Mexican configuration, what we have called the multicolor Mexican in this article, due to the many emotions he experiences every day, which may take him from love to hate in a matter of seconds.

Censydiam is a powerful research tool focused on people, not brands, which is why its premise states that human behavior is driven by four fundamental motivations (enjoyment, control, power and belonging) and four secondary ones (vitality, safety, conviviality and recognition).

Censydiam motivation-based frame has solved business questions in over 70 countries, across different categories.



Enjoyment: “Kicking up our heels”

Mexico is colorful, warm and one of the fifteen happiest countries in the world. Its people will always have a reason to celebrate, it does not matter there is no money to throw a party, some even dare mortgage their home in order to throw a sumptuous party for their 15-year-old daughter, since, in Mexico, they are introduced to society as women who are no longer children.

In Mexico, kicking up your heels means to let yourself be driven by feelings without thinking about the consequences of your actions; it means hedonism at its most active stage; it has no ties and whose philosophy is *carpe diem*.

Overall, we kick up our heels along with spirits. Tequila and mezcal are usually present in every celebration: a new family member birth, National Independence Day, even the Day of the Dead –at this point, it is worth mentioning that death is a symbol in Mexico that has been worshiped and respected as a deity since forever, because death, even when it points life’s ending, is also the perfect excuse to give into the pleasures life offers without regrets.

When a Mexican guides his own behavior through the enjoyment driver, he leaves aside conventionalisms, the ought-to-be, the diet, and the calories. As proof, we have the negative consequence of being the number 1 country in obesity (according to WHO), 33% of the population being affected by this disease. This has had significant consequences on the food mass consumption industry, as the government has demonized categories such as ready-to-eat cereals (Kellogg’s and Nestlé), candies and chocolates (Nestlé, Hershey’s, Mars, etc.), snack cakes (Bimbo), carbonated soft drinks (Coke and Pepsi), juices and salty snacks (Sabritas and Barcel), among others, levying higher taxes, when the real problem lack of a balanced diet due to poor education.

This has forced large companies to be more careful considering the nutrition facts labeled on their packages and/or to stress out their positive characteristics over the negative ones. An example are chocolates, which now sell the energy contents or functional attributes (chocolate has antioxidants) as benefits to reduce the negative perception on calories.

This has made understanding the consumer more difficult in the research industry, since it has laid on the table an apparent contradiction: what it does (real self) against what it says it does (projected self). While the consumer consumes high-calories products in his daily routine (real self), when asked, he states he consumes healthy products and exercises (projected self). This is neither a lie nor a contradiction, but rather consumer’s layers

that we must understand and consider to create our brands' strategies.

A brand that has learnt how to capitalize this contradiction is Coca Cola with its LIFE product, which attains the best flavor possible with Stevia, a natural sweetener that delivers fewer calories than sugar.

Control: *"Women should be like shotguns..."*

"Women should be like shotguns... always loaded (pregnant) and behind closed doors." This statement reflects the sexism that guided the country some years ago, which has significantly decreased, especially in large cities, thanks to open-mindedness regarding gender equity.

Currently, Mexico has a society where women look for performing the same roles as men do, either personally or professionally. In this change the country is undergoing, traditional stereotypes start losing relevance, and we find more manly women and feminine men. Nonetheless, the effort to change ancient mentality has just started, since women still earn less than men, and vulnerable groups (homosexuals, elderly and ethnic groups) are still victims of discrimination.

Intolerant attitudes are undesired and disapproved in the country. They are perceived as the reflection of a backward mindset and lack of culture, which is why a large part of society struggles every day to get rid of the stigma that keeps dulling Mexico's shiny color spectrum.

Its implications would be found, for instance, in the communication field, where women-targeted products messages tones should change from "home's soul" to "being a multitasking woman", or better yet, a "super-woman", because she plays several roles at the same time: family support, housewife, mother, and father. Focus changes from product performance (better overall performance) to how it makes her life easier (as recognition to her effort on being a super-woman), allowing her to spend more time with her family.

Currently, in Mexico there has not been any brand that massively conveys a "gay-friendly" message, since this market is only being targeted by local stores as a niche, which represents an opportunity area for large companies since this segment is growing.

Power: *“My word is Law”*

“My word is Law” is a Mexican saying that reflects being more powerful than the others. We can make an analogy with one of the most repeated words from the marketing jargon in Mexico: aspiration. This term refers to the wish of showing a superior lifestyle than the one you actually have; going into debt is usually a fast way to achieve it.

Aspiration is present in most SELs in Mexico. However, it is more obvious in medium and low SELs, since inconsistent behaviors are frequently observed, where, in spite of lacking basic needs, people own an 80-in screen to convey power as head of the family, besides being the envy of the neighborhood.

In order to keep their aspirational status, Mexican people are willing to do many things: from pawning family jewels to starving, anything to show superiority facing others.

Therefore, many brands’ challenge is to convey this feeling of power, even if it is just for a moment. An example is Starbucks, which makes you feel superior even if it is just for an instant, and has evolved from selling very expensive coffee to selling mugs with its logo to show a purchasing power above the others’, even if the coffee is not of the best quality.

Elektra brand has profited from Mexican’s desire to show power through the immediate purchase action. In this store, there is often a wide variety of electrical appliances, even motorcycles and Chinese vehicles, which, through monthly installments, allow low SEL people to purchase their “power symbols” immediately.

Another opportunity lies in premium categories, which gain shelf governance and help the retailer to earn more profits. This has been done, for instance, by coffee categories, which, from being consumed by everybody, have diversified into more expensive and profitable subcategories, like whole bean coffee and cappuccino variations.

This has led to sell brands such as Dolce Gusto among low SEL families, which helps them feel superior than others and that they are one step above within their SEL.

Belonging: *“Only one mother”*

Belonging is very important for Mexicans, from supporting the national football soccer team to friends groups we all belong to and yearn for so much. An example is how relevant the mother role is in the family to strengthen a feeling of belonging.

Mexico is a country where the mother role is highly respected and it entails specific activities, such as looking after the children, preparing food for her husband, and doing all house chores. In a few words, for the Mexican traditional mother, her family well-being represents her own well-being.

Even if Mexican women are currently breaking the traditional roles, the image of selfless and unconditional mothers is still respected, and even worshiped in Mexican Catholicism through Our Lady of Guadalupe.

According to the legend, Our Lady of Guadalupe appeared several times to a Mexican native called Juan Diego until she left her image captured in the native's “ayate”. This item is visited every day by hundreds of Mexicans and believers from all over the world.

Considering this latent tradition, Distroller brand decided to launch a product line featuring a cartoon of Our Lady of Guadalupe. This Mexican company bet on Mexican folklore and colorfulness since the beginning, having a great success imprinting its designs in different products, from cookies and toys to notebooks with Distroller's hallmark. This company started with a capital of less than \$100 USD and is now present in Latin America, Peru, and the USA with more than 2500 products.

The challenge is to find belonging opportunities for brands and a possible solution is to stress out Mexican products and become more nationalist regarding products already on the market. One way might be to stress out whether a product is “Made in Mexico” or if it has a certain ingredient. Another option is being socially responsible and having programs helping communities in Mexico.

In both cases, brands achieving to convey this will have a competitive advantage capitalizing the feeling of belonging.

[New avenues to explore]

BY Erika del Carmen Ruíz Martínez
Ipsos Marketing

Empowering clients: the dream of luxury

Luxury is a necessity that begins where necessity ends.
Coco Chanel

Recently, more malls and an increasing number of high-end boutiques have opened on Mexico's main avenues. This leads to a closer relationship with global and high-value brands, some of them known only to people who travel abroad, though some others bear a status value in their own society.

Today Mexico is a potential market for such brands. Just in 2014, there was a 14.000 million dollar invoicing, surpassing Brazil, and ranking Mexico as first in luxury good sales in Latin America.⁵⁰ Furthermore, Mexico will be one of the 10 luxury goods markets with the highest growth by 2019.⁵¹

But why are Mexicans so drawn by brands? What do we look for in luxury?

Las marcas de lujo que llegan a abrir boutiques con marcas establecidas y reconocidas a nivel global están en continua búsqueda de consumidores dispuestos a pagar por su valor.

Luxury brands that get to open boutiques worldwide are in continuous search for consumers willing to pay for their value. A particular situation occurs in Mexico, which, in my opinion, has had an impact on the search for these types of goods. Over the past few years, women's participation on the labor market went from 18% in 1970 to 42% in 2011.⁵² Thanks to this growing participation in the most significant roles and by standing out notably "in the professional arena", the household income definitely increases, enabling the access to high-value goods. On the other hand, according to Conapo,⁵³ the likelihood of having children before turning 25 years old is in decline.

Women's priorities have changed, as well as those of young couples, since they put off marriage, as well as their first child's birth. What about it? Well, for starters, when Mexicans begins with more productive and higher-wage life stages, they have more flexibility and space for spending in higher-value brands or

⁵⁰ *El Economista* [online]. Available at: <http://eleconomista.com.mx/industrias/2015/06/05/mexico-toma-punta-mercado-lujo>

⁵¹ *Id.*

⁵² http://www.inegi.org.mx/eventos/2011/Encuentro_genero/doc/31-07RLM-PatriciaEspinosa-STPSMexico.pdf

⁵³ http://www.conapo.gob.mx/work/models/CONAPO/perfiles_salud_reproductiva_estados/Perfiles_SR_15_MX.pdf

goods. Luxury cars sales alone have had a huge increase as stated by some reports: for instance, BMW grew 21%; Mercedes Benz 29.3%; and Infiniti 8.5%.⁵⁴

Undoubtedly, this sector growth can be confirmed according to a survey conducted through Livra online panel,⁵⁵ reporting that 71% of population claim purchasing luxury brands, mostly, the male sector.

It also reveals that 78% of these purchases are made by 25-35 year old people, whose last luxury brand purchase took place in the past 3 months (60%). This points out that these brands are present in our everyday lives.

Fashion malls increase makes it more accessible.

⟨INTERVIEW⟩

For Mexicans, talking about luxury involves two clear terms: quality and high price.

Luxury is associated more with quality than with price. Quality renders high price. On the other hand, we are aware that luxury can be anything we want, but we don't need. So, what do we enjoy when having something luxurious?

The three aspects we enjoy the most when purchasing a luxury item include:

1. *Indulgence: "It is something I deserve. I treat myself."*
2. *Escape: "It helps me escape from the routine. It makes me happy."*
3. *Achievement: "It makes me feel I am constantly outdoing myself."*

Luxury helps us feel better about ourselves; it is a way to treat ourselves and show we are "doing well, and not only that, but we are doing it right". Precisely, since it is a matter of indulgence, when you think you've worked hard and you deserve it, there's no room for later regrets. In fact, we stress on it because 50% of population states not feeling that way.

The luxury goods market has evolved. I remember that a few years ago, when Versace's shirts the like Luis Miguel used to wear were trendy, being flashy was common: the bigger the logo or the brand, the better. However, today 82% of the population prefer brands with discreet labeling. We might be following China's example, where having showy and flashy brands is an old-fashioned practice.

⁵⁴ <http://eleconomista.com.mx/industrias/2015/05/05/mexico-sin-freno-ventas-industria-automotriz>

⁵⁵ 500 online interviews were conducted nationwide among 18-55 year old men and women (SEL AB, C+, C, D).

⁵⁶ <http://www.lagranepoca.com/internacionales/asia-pacifico/11898-oportunidades-para-marcas-de-lujo-ante-consumidores-chinos-menos-ostentosos.html>

Brands such as Gucci or Prada are having losses in some countries. Gucci specifically, due to the speed it opened boutiques, lost its exclusivity image, which is an aspect Chanel has handled very well,⁵⁶ by turning some items hardly affordable. This moment is known in China as the “anti-bling”: when classic or craft brands such as Bottega Veneta are yielding better results.

In this regard, can we see today this trend in our country? Images with handcrafted couches with Huichol embroidery have circulated across Mexico. Will there be room for local luxury goods? 74% of Mexicans state they like trying out different luxury brands. Thus we may ask: are there any chances? I think there are. At the end, a luxury item for us equals quality and high price, but luxury also means comfort, visual appeal, elegance, and especially, exclusivity; something we can find in handcrafted items.

We live in a society where luxury is not only “an open brand’s statement”, or “its possession as a part of a whole”. The purchase experience is also relevant.

Therefore, we can point out that one out of four people enjoys the purchase experience, since the consumer’s objective is “to feel special”. The purchase experience is definitely important: the service you receive and how it makes you feel creates a high value in high-end boutiques. If you’re going to spend a considerable amount of money, at least you must be treated right.

Aspects of service such as promptness, treatment, and tone gain relevance. A few days ago, I visited a luxury goods store and there was only one person in charge of the place. After 10 minutes, I left the store without having received the service I was looking for. How come these types of stores have one single person taking care of customers? These details gain increasingly more relevance when owning the object of desire isn’t everything.



In face of a growing market, to which not the entire population has access, what happens with fake items? Are we willing to purchase fake luxury brands? Four out of 10 would, but 7 out of 10 consider it is important purchasing a luxury genuine brand. So why would we purchase a luxury brand? All comes down to low price, but what about the purchase experience? Where is the side of feeling special? Where is the side of indulging myself? Without the experience, the luxury goods purchase is meaningless.

In the Survey on Piracy Consumption Habits 2011,⁵⁷ it is reported that most piracy purchases are mainly music and movies; clothing and accessories represent 16%, increasing as the socioeconomic level lowers. It would seem that, as long as luxury goods purchase increasingly depends on the experience, piracy goods purchase perhaps doesn't represent still a great risk for brands, particularly at high levels, which is the actual target of these brands.

As stated in El Economista,⁵⁸ we are in the New Money-Old Money transition. In other words, from new rich consumers to consumers from old wealthy families where being flashy is in the past and the focus is the value generated by luxury for consumers.

This stage can go faster due to the constant information and contact with European countries, where money has been left behind, and luxury means more time, higher life quality, where they consume to a greater extent travels, treatments, spas, "goods" where the experience is the only thing that matters.

Although Mexico's context is different, every day it becomes more common to listen about gifts such as trips or mini-spas for the little ones. It is about taking full experiences to your door.

There's now a trend known as "the power in me",⁵⁹ where the objective is to write the story: the logo no longer matters, but the intrinsic value, what I do with it. The power is in me, in what I do with the brand.

How can we offer luxurious experiences with Mexican brands that can coexist with worldwide renowned brands?

Luxury brands are appealing for us. The experience we can have with them and make us feel special, because it isn't a decision we make carelessly.

⁵⁷ AMERICAN CHAMBER
MÉXICO, *Encuesta de
hábitos de consumo de
piratería 2011.*

⁵⁸ [http://eleconomista.
com.mx/
industrias/2015/06/05/
mexico-toma-punta-
mercado-lujo](http://eleconomista.com.mx/industrias/2015/06/05/mexico-toma-punta-mercado-lujo)

⁵⁹ IPSOS, *Censydiam
Trends*, 2015.

Targeting young consumers, the Child-Kings

BY **María Eugenia Marbec & Laura Romero**
Ipsos Marketing – Ipsos HealthCare

Today's Children

It seems commonplace to hear that today's children are smarter, faster, and even more mature than their parents were when they were the same age. These statements describe changes referring to the coming of a new generation. We might even think that new generations' children and youths have always been perceived as different and menacing.

But, what are the traits of this new generation, —called the Power Kids or Generation We— that makes it so particular?

In this article, we will try to understand the context these children⁶⁰ live in and develop, as well as its impact on their childhood. Undoubtedly, this life stage is essential for any individual's development, regarding not only physical, mental, and emotional skills, but also their development as present and future consumers.

Over the past few decades, important demographic and economic changes have taken place. The increase in single-parent homes, the number of women joining to the work market, as well as single-child homes are some of the factors that have reshaped families and children's reality.

This new reality poses also new needs, among which we find children getting into school at an early age. Traditionally, children were expected to develop their social skills and their own identity between 6 and 11 years old. However, since they start school at an earlier age, nowadays children develop said skills earlier.

Early socialization is justified by parents and educators based on the need to stimulate children early and prevent them from getting bored in class. At the end of the day, one outcome of this process is more self-sufficient and independent children at early life stages.

On the other hand, the tendency to have fewer children per couple has an impact on children who not only have less access to

⁶⁰ According to the Convention on the Rights of the Child, children are defined as people less than 18 years of age. For this article's purposes, "children" are those between 0 and 11 years old.

peer-to-peer socialization but also are considered as the family's third adult, instilling behaviors and habits that are uncommon to children.

Access to mass media and technology has also an impact when setting out children's behavior and consumption habits. Children have unlimited access to communication technology and develop in the digital world as native. The educator Mariano Narodowski defines this phenomenon as *"hyper-accomplished childhood"*.⁶¹ children fully master the Internet, computers, Smartphones, dozens of TV channels, and are completely independent when it comes to using them; they no longer require their parents' guidance since, more often than not, they do not share the same skills.

⁶¹ Cfr. Narodowski, 1999.

These children, financially dependent but knowledge-independent, put adults, who often feel their authority is threatened for not being able to share this new language, in a tight spot.

Consequently, we face a shortened childhood stage, as Ana Castanedo⁶² points out, with children who behave and talk like teenagers or adults. Nonetheless, it is worth stressing out that they lack the maturity to be such or act as such.

⁶² Interview to Ana María Castanedo, clinical psychologist, specialized in family. Professional License: 1362984.

It therefore seems that today's children are not smarter, but that media have changed; access to information seems unlimited and immediate, but it does not necessarily come along with the capability to process information critically.

As an accompanying phenomenon to a shorter childhood, society is experiencing a lengthening of the teenage stage, affecting not only children who come early into this life cycle, but also adults, who seem to refuse to grow up.⁶³

The effect of both phenomena on families is that the gap and boundaries between parents and children become blurry, e.g., adults' hierarchical authority is threatened or diminished.

⁶³ "Adolescentism refers to wanting to dress and act as a teenager as a form of erotic gratification." Revista Argentina de Neuropsiquiatría Clínica, año XIV, vol 11, núm. 2, April 2004.

We believe it is important not to overlook the fact that, in countries such as Mexico and Latin America, there is a tension between "hyper-accomplished" childhood and "unaccomplished" childhood.⁶⁴

⁶⁴ Cfr. Narodowski, 1999.

Many children's childhood is threatened in our country not by the excessive access to information, but rather lack of it. According to Narodowski's description, these children are self-sufficient in getting their own food, do not attend school, are digitally illiterate, and the State offers them nothing but compensation policies.

With these characteristics, Generation WE children represent a great opportunity for product and service companies, which target their communication and efforts to this segment of the population that seems to become more influential on consumption decisions at households.

Mexico's children

Even when Mexico has over 24 million children aged 0-11 years old, only 17.5 million have any consumption capability. 9.6 million (40% approximately) might be considered as children with access to communication and consumption, since they do not live in poverty conditions.⁶⁵

⁶⁵ According to UNICEF's estimate, 27% of Mexican children live in poverty and about 61% are in material poverty.

According to the National Census of Population and Housing 2010, households having at least one 14-year-old or younger represent 72.6%. Out of every 100 children, 74% live together with both parents. The other children belong to single-parent homes or a structure without parents.

Consistently with global trends, currently 24.3% of homes have one single 12-year-old or younger, and 17% have two children.

Children and consumption in Mexico

Both parents and children admit that they have a basic role in consumption, especially in some categories. This influence might be subdivided into 3 different types: a) when the child decides directly on purchases; b) when the child has an influence on family's purchase decision; and c) when the child creates future purchase habits.

In a phone survey conducted by Ipsos⁶⁶ in the country's three main cities among parents with 2 to 12-year-old children, parents agree that children of all ages influence somewhat or significantly on the decision on categories such as candies, snacks, refreshing beverages, videogames (especially children between 9 and 12 years old), and, more significantly, outdoor activities (91% mentions the child influences significantly or somewhat) and clothes/fashion (81% mentions children influence significantly or somewhat). Even on technology, 6-year-old children and older have a strong influence on the purchase (72% influence significantly or somewhat).

Out of these parents, 16% recognize it is not easy at all to set boundaries to little consumers' wishes and it goes up to 42% those who mention it is somewhat difficult. On the other hand,

⁶⁶ Ipsos. *Estudio Cuantitativo Telefónico CATI* (Computer Assisted Telephone Interviewing). Random sample from the phone book, conducted among 18-year-old or older men and women, parents of 1-12 year-old children in Mexico City, Guadalajara, and Monterrey. 100 total interviews.

almost every interviewed child gets money from their parents (89%) and they use it mainly to purchase foodstuff: candies, meals, and ice creams.⁶⁷

Consistently with global trends, children in early stages have an unlimited access to ICT (Information and Communications Technology). Out of the interviewed parents, 67% mentioned having Smartphones at home and almost half of them are used by children (20% of the children have their own mobile phone).⁶⁸

As for tablets, 32% of homes have one, and in 27% of homes, tablets are used by children. And of course, children have free access to videogames consoles at home (24%).

In a survey conducted among 6 to 12-year old children in Mexico City, Guadalajara, and Monterrey,⁶⁹ it was observed that 50% of them have access to Internet at home, and 1 out of 3 uses it on a daily basis. Over 60% has access to broadcast TV, and 22% to pay TV. From the children who watch TV, most of them do it without parental supervision (60%).

Almost 4 out of every 10 children mention having a personal computer, which is mainly used as a game/entertainment element, but it is also relevant to do homework, watch movies, surf the Internet, and chat.

Conclusions and implications

ICT strong influence on our life and its assimilation to our world is a phenomenon that is here to stay and it will keep changing our lives and our children's. ICTs have an impact on the way we relate, understand, learn, and explore creativity and the world itself.

Today's children are highly capable of getting information immediately, processing it quickly, and have a great visual development and multitasking capability. They are exposed to be continuously and immediately bombarded with unlimited stimuli and information.

As adults and parents, we might get afraid and try to ignore these changes, or we can get involved and walk actively and responsibly together with our children to guide them through this new language, giving it meaning and values.

⁶⁷ Ipsos. EGM Kids: Quantitative survey based on individual interviews conducted in homes. Random stratified sample per city, SEL, and day of the week. Conducted among 6-11 year-old children in Mexico City, Guadalajara, and Monterrey in suburban areas. 6,000 total interviews between July 2014 and June 2015.

⁶⁸ *Id.*

⁶⁹ *Id.*

We must not forget that, what protects them and educates them in the real world is the same that protects them in the virtual world. The same goes for consumption and decision capability regarding the market.

Finally, from marketing and advertising professionals' perspective, this new "hyper-connected" childhood having more adult-related tastes and higher influence on consumption decisions represents a great market opportunity.

Nevertheless, it is essential to understand that this opportunity entails a great responsibility, since these children consumers, even if they have gotten adult information and decision-making skills, have not necessarily acquired maturity and selection capabilities needed.

Just as the Convention on the Rights of the Child states, "children have the right to special care and assistance" and the consumption world is not exempt from respecting this right.

It is the responsibility of adults, parents, educators and communicators, including consumption and services companies, to collaborate in fostering a critical, informed, eco-friendly, and socially respectful consumption culture.

A Tale of Two Cities: managing the digital gap

B Y Carlos de Zúñiga
Ipsos Connect

It is said all around the world that today's consumers are in control of every aspect of their life. Their purchase decisions, the wide variety of communication media they choose, the entertainment they are exposed to, the information they get, and obviously, all those ways they have to know and use the existing products on the market.

It is true this has evolved at a fast pace. Similarly to developed countries, modern Mexicans are exposed to a wider product, services, and communication media offer that force them to be more selective in their purchase decisions.

Simultaneously, marketing professionals face the challenge of catching consumers' attention, understanding them, and building long-term relationships through their advertising efforts highest performance.

We ask our customers: "What do you ask to your media agency when defining a communication strategy?" The answer is usually focused on defining which media each brand's target consumers is exposed to, so that they help reach business objectives (correlated with the market share growth and a good ROI).

We also ask them: "What are the key performance indicators (KPIs) you use to evaluate the strategy proposed by your media agency?" Their answer is divided in two:

- Strategy: mind disposition (awareness, purchase consideration, value, and penetration)
- Execution: GRPs, reach, frequency, impressions, contacts, inclusions, and ROI.

Nonetheless, almost no one focuses on knowing the consumer and we think that, to complete brands' communication strategy, they need to understand Mexican consumers' reality, their current context and the trends that will define the relationship with the brands.

We see Mexico's reality in the Digital Age, we find something that would seem like the first lines of Charles Dickens' A Tale of Two Cities; "It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of Light, it was the season of Darkness, it was the spring of hope, it was the winter of despair, we had everything before us, we had nothing before us, we were all going direct to Heaven, we were all going direct the other way – in short, the period was so far like the present period..."

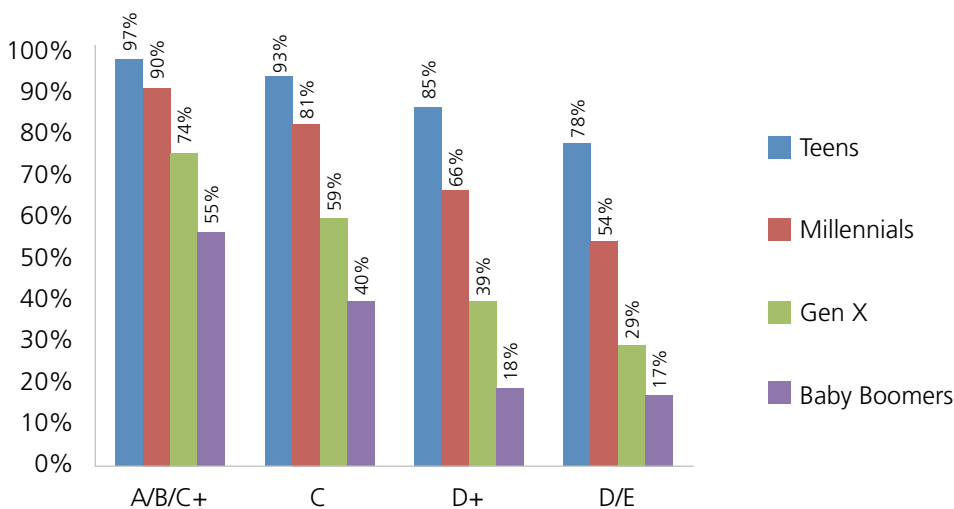


Let's begin with the economic context: according to the National Council for the Evaluation of Social Development Policy (CONEVAL), between 2012 and 2014, poor population percentage increased from 45.5 to 46.2; therefore, in 2014, 55.3 million people were estimated to live below the poverty line, from which 11.4 million live in extreme poverty (9.5% of Mexicans).

The other 53.8% of the population is divided into 26.3% vulnerable by social deprivation, 7.1% vulnerable by income, and lastly, 20.5% by "non-poor and non-vulnerable population" among which we find the second wealthiest man in the world and other 15 billionaires (in USD) according to Forbes.

This poverty level has caused consumers to be more sensitive regarding the price and the entry of more competitors having better value equations seeking every day a larger piece of this cake. This situation has created an increasingly more complex environment for marketing strategy.

Now, if we check the digital field, according to data from Ipsos' General Media Study (EGM by its acronym in Spanish), in 2011 only 39% of Mexican population had access to Internet, while today this figure reaches 59%. This increase has taken place mainly in low SELs going from 24% in 2011 to 46% in early 2015.



As observed in the chart above, the access to the digital world has an indirect relationship to age and a direct relationship to socioeconomic level, reflected in all life aspects of different generations. Therefore, marketers must adapt their strategies depending on the generation they want to reach and whether their target group belongs to the digital world.

If their target is Baby Boomers (50-60 years old) from which only 22% are in the digital world, 62% will read printed newspapers and the double of magazines than their non-digital contemporaries. 60% will be more exposed to radio and see paid television twice as much.

Four out of 10 have a bachelor's degree against only 6% of non-digital. They are 3.6 times more willing to purchase at department stores and they travel for leisure 2.3 times more. Per every non-digital Baby Boomer who speaks English, there are 10 digital ones who do so; and per one non-digital bank user, there are two digitals who are bank users.

On the other hand, non-digital Baby Boomers watch 20% more broadcast television; 72% completed secondary school only; they go to the movies 60% less frequently than the digital ones; 71% pay less attention to calories and they travel 4 times less for business than digital Baby Boomers; and despite they are not in the digital world, they consider that they can learn general culture on Internet.

But if their products are targeted to Generation X members (36-49 years old) who are already part of the digital world (42%), they will be 20% more sympathetic to the National Action Party (PAN), a conservative, right-wing party; the non-digital 30% will be closer to the (Institutional Revolutionary Party (PRI), and 33% to the left-wing Party of the Democratic Revolution (PRD).

Digital Xs go to the gym 3 times more often and tend to purchase 30% more in the evening at supermarkets and 8 times more at price clubs than those who aren't in the digital world. Per every 7 digital Xs who speak English, there is just one non-digital.

Similarly to non-digital Baby Boomers, non-digital Xs see 27% more broadcast television and consider that broadcast television influences 20% more their purchase decision. Furthermore, 31% are less concerned about the environment and they don't care about their personal appearance (+27%).

Nowadays, Millennials (20-35 years old) seem to be the most aimed target and considered to be 100% digital. However, in Mexico only 63% is and they also behave differently from non-digital ones:

Digital ones read the double of magazines and watch paid television 2.3 times more; three quarters of them completed high school against two thirds of non-digital ones. 57% of digital Millennials read books and play board games against only 5% of non-digital, who watch broadcast television 25% more often.

On the other hand, non-digital Millennials consume 25% less bottled water, half of sports drinks and one out of four doesn't own a cellphone. They prefer waiting instead of purchasing in installments, and they don't like designer clothes. Per every nine digital Millennials who speak English, just one non-digital does.

The generation with more digital presence is composed of teenagers (13-19 years old) where 7 out of every 10 are already immersed in the virtual world. Their first activity with their cellphone is texting; their role models are Messi and Ronaldo;

they prefer snack cakes. Digital teenagers read the double of magazines, watch paid television 3 times more often, go to the movies and museums 3 times more often.

Regarding education, 50% of digital teenagers are in high school or higher, while 80% of non-digital ones are in secondary school or lower. Non-digital teenagers listen to the radio half an hour more; their second activity with their cellphone is taking pictures and only 65% owns a cellphone against 88% of digital teenagers who also own a videogame console 5 times more often.

Brands must realize the world is moving towards the digital age, meaning that obsolescence of brands, products and contents is increasingly higher; people want to talk to other people through social media, not with corporations; digital users are not only receivers, but also information generators; they decide who they talk to, what they see, and these digital consumers are increasingly exposed to digital media.

However, the digital world is only one part of Mexican society and, at least for a while, past and future will have to coexist. Digital and non-digital generations' consumption habits are different. They coexist in the same environment, but their life styles and media exposure are different.

Therefore, we must learn much more about them in order to be able to approach them directly, and find the points of convergence where they share preferences to build a more effective communication. Brands must make them perceive they are actually acknowledged, to be able to catch their attention, establish long-term relationships, and make the most out of advertising efforts.

Connecting brands, art and culture

B Y Federico Borenstein & Stephanie Haidenberg
Ipsos Marketing

Some questions to begin with!

Mexico's art and culture: do they exist? Are they developed or created? Do they provide the artists with a way to earn a living?

To answer the previous question, it is important to understand the meaning of both concepts:

While the most common use of the term 'art' is primarily limited to its bibliographic use, what traditionally is known as high culture comprises painting, sculpture and architecture. Classical fine arts also include dance, music and literature. To these, new arts have been added: the seventh art (cinema), the eighth or ninth art (photography), and comics, television, and advertising. The concept of culture is even more generic and comprises all human activities (from gastronomy to expressions related to folklore, popular traditions, fashion trends and all kinds of subcultural proposals: leisure, urban tribes).

There are some reasons why our country does not exploit the potential of its own artists, who must look for success on other markets. Mexicans tend to favor what comes from other countries over what is done in the country due to aspirational matters. Most Mexican professional artists (at least, dancers) come from lower-middle to low SELs and their hopes are set on making it in showbiz, since being part of the entertainment world by dancing in musicals or dancing for famous artists is more profitable, than working at cultural venues.

There are really good professional schools throughout the country offering Bachelor degrees in arts, but there are no jobs in the field. The niche is very narrow, unlike other countries, where there are plenty of job opportunities, meaning there are many artists, talent development and competitiveness.

Part of this vicious circle is based on the fact that art appreciation is not common in the country; it is neither aware of the importance of promoting it among young people nor of the fact that Mexico's development could be achieved through said support. The following information is given as a supporting statement:

A report on the country's cultural support pointed out that although federal resources allocated for cultural promotion and focus are meager and need to be increased, said increase should not contribute to boost the impact of these activities neither among population nor on the country's development.

The report states on the first page that the budget allocated to culture has tripled against the 2000-2001 period, reaching \$14.2 billion pesos in the past year. However, results achieved fail to reflect it, since during that same period there were clear significant downward trends in some indicators such as: number of readers or the flow of visitors to archeological sites and museums.

Yet, Mexico's cultural activities that year contributed with 2.7 GDP according the National Council for Culture and Arts (CONACULTA). Therefore, if there was an increase of public investment in art and culture, GDP input would also be affected.

Likewise, within the country's cultural habits, since age 12, only 6% do not watch TV. According to a research project conducted by UNESCO, only 55% of Mexicans has visited a library, 41% has visited a book shop, AND 27% has read at least one book in the past twelve months. In Spain this last figure reaches 59%, 71% in France, and 82% in the UK. Four out of every 10 Mexicans are not used to read newspapers, and half does not read magazines. One quarter of the population do not have a single book at home.

On the other hand, as per data collected by National Institute of Statistics and Geography (INEGI), from 147,183 people registered as employees in the arts and show business field, 13.3% are women (more than 50% are under 30 years old). Out of 19, 500 women working in the arts and show business, 17,000 earn less than the minimum wage.

Therefore, if the population is not engaged in culture and is more interested in mainstream television shows, professional opportunities in that field will narrow, because it is not something people appreciate and pay for.

Answering previously posed questions: do the Arts exist in Mexico? Are they developed or created? Do they provide artists with a way to earn a living?

The answer is still no, due to the greater appreciation for commercial mainstream arts and entertainment in past years. According to information provided by the National Survey on Cultural Habits, Practices and Consumption (CONACULTA,

2010), 90% of interviewees watches television, from which 40% do it for more than two hours a day. Likewise, a study conducted by IBOPE AGB (Brazilian Institute of Public Opinion and Statistics) shows that Mexicans' favorite shows are: showbiz, musicals, soap operas, blockbusters and soccer matches.

This has been exploited by large television networks that saturate their programming with soap operas, and try to portray Mexicans' aspirations: a tough life that will be solved by a wealthy Prince Charming, or dancing and singing reality shows that shoot ordinary people to stardom, making people stay home on Sundays and pay for phone calls to vote their favorite contestants.

These networks claim the content of their shows is what people want, having their rating as endorsement. Hence, they do not look for changing the programming.

Nonetheless, reality is that people choose them since they have no other choice. According The Competitive Intelligence Unit, a telecom-specialized consulting agency, paid TV service was recently purchased in 5 out of 10 homes, so they cannot know if that is the programming they really want.

What would happen if they were given another option? Alternatives need to be sought that satisfy audience's needs, because we are getting tired of the same old.

On the other hand, regarding marketing: is there anything brands can do? There are hot trends such as Green Marketing and Social Responsibility that started as niches, but now are concepts already saturated with brands and companies. What is next? Is there a non-saturated option nowadays?

We see a new niche of opportunity in culture and art founded on 4 major aspects:

1. As previously stated, there is an opportunity for artistic development since there are a lot of underappreciated art professionals who try their luck overseas.
2. The audience is already tired of the same. Mainstream no longer satisfies them 100%, but they do not have other proposals or options.
3. Mexico has 2.000 cultural venues approximately, 600 theaters, 1.200 museums (Mexico City has the largest number of museums in the world). Unlike other countries, these venues are not exploited.
4. There has been an impressive growth in cultural and arts festivals (Festival Internacional Cervantino, Feria

de las Culturas Amigas, Cumbre Tajín) and art creation promotion programs conducted by some brands supporting CONACULTA.

So, what would be in store for large culture promoting brands and companies in Mexico? Beyond expecting a net income growth, brand perception would improve, because by boosting culture and art, two types of improvements in the country would be made:

1. Economic: because there will be more job opportunities in that field
2. Sociocultural: mainly reflected in children and youngsters, as they need leisure options where they can discover their personality by being able to engage in different activities. Since art is an amusing discovery, it would help their development and show them there are multiple paths, as well as companies and brands sponsoring them.

An example of a brand that supports art and culture in Mexico is “Los 40 principales” through “Arte 40”. During the past five years, this has been an expression forum for talented young people, receiving more than 17, 000 works in disciplines such as plastic arts, photography, urban art, installation art, multimedia and alternative media.

Because of its huge growth and success, this project has turned into an art creation promotion program sponsored by Mexico’s National Institute of Fine Arts (INBA), CONACULTA, Guanajuato’s Government and Peugeot, a brand that joined this fastest-growing movement.

「 To customize or not to customize... that is (still) the question 」

《 **by Ricardo Salas**
Ipsos Public Affairs 》

Once upon a time...

A king had several sons and wanted to arrange marriages with the princesses of different kingdoms who were eagerly waiting for Prince Charming. The king had to decide how to best educate his sons so when they'd meet the princesses they had better chances of making a match.

On one hand, he could educate them according to each kingdom's customs, so his sons could mirror a princess' culture as much as possible when they met. However, educating them this way was very expensive, and the king's resources are limited, so he could also decide to educate them all in the same way and hope that they were a better match than other pretenders.

What should the king do? Does this story sound familiar?

Corporations/Marketing Directors face a very similar dilemma. They want consumers to fall in love with their brands and have to decide how best to approach them... using limited resources (a very tight budget). In times of economic hardship and financial turmoil it is common for companies to cut back on marketing and advertising expenditure and "re-use" concepts, products, and campaigns developed in one market or region, to reapply them in other markets (or to define a common strategy for an entire region).

In a world where shareholders and quarterly bottom line results rule most corporate decisions, re-using is not only understandable but encouraged. However, short term cost cutting may hamper future profit and growth. The return on local development should not be measured exclusively on cost, but on return on investment. So what should the king do?

After years of fiercely defending the "uniqueness" of the Mexican consumer and strongly advocating for customized development, instead of following a regional guideline or reapplication, I find myself at a crossroads.

I've always believed that marketing strategies or communication that work in one country may not necessarily work the same way in another, and evidence supports this belief (ASI Copy Testing Learnings Latam). However, during the past year I have been working on several regional studies that lead me to question if I should continue to defend this idea... Maybe it is time to revisit this ever relevant question.

The "traditional" arguments in favor of customizing marketing and communication strategies against regionalization or reapplication can be grouped in two broad clusters: Markets Dynamics and Consumer DNA.

Market Dynamics account for all those situations that are unique to each market, including category penetration, the number of competitors, their relative strengths and positioning, as well as the story behind the brands in the market. It may also include other variables such as distribution, entry barriers, legislation, etc.

Consumer DNA is a more complex and even a subjective matter. It comprises consumer desires, needs, preferences, habits, etc., which in many cases are a reflection of local history, beliefs and traditions. This DNA is responsible for how we might react to different stimuli and how we relate to brands and their promises.

Market Dynamics should always be the first thing to consider when evaluating local development against re-application or customization of a strategy against following regional guidelines. Market Dynamics reflect how the brand is competing, and thus which strategies are not only desirable but feasible.

Many times I have seen cases where a leading brand in one country had a late entrance in another country and consequently faced an opposite situation. Under these conditions it is clear that re-application or following regional guidelines will not result in success for one of the countries.

Assuming that Market Dynamics are not an unsurpassable barrier for a brand within a region, Marketing Directors and Brand Managers who want to apply a regional strategy in Mexico or use communication developed in another country will still have the challenge of working with consumer DNA.

How different are Mexicans from other nationalities?

What makes us different, what makes us unique?

There are many articles within this publication that focus on these questions. Some are written with pride, other are written to make us think (and strive to be better). For me it is not a matter of black or white. There will always be common characteristics and something that makes us stand apart from other nationalities.

So what is different now? Why the need to revisit conventional wisdom on this topic?

In one word... Technology.

Technology has, is and will keep reshaping the way brands, services and products interact with consumers, but most importantly, how consumers interact with each other. The overwhelming pace at which technology has changed the way we communicate in the past 25 years is having a profound impact on our Consumer DNA, and this impact is inversely proportionate to age: the younger you are, the higher the impact.

When talking about age groups it is very common to use "generations" as reference. Baby Boomers, Generation X and Millennials are everyday terms widely used in Marketing. But what exactly is a generation and what does this have to do with our title question.

The Spanish Philosopher Ortega y Gasset defined a generation as "A group of people who share a time and place, who have the same age (understood as being born in a certain period of time) and who have some sort of 'vital contact'." ⁶⁹

I like this definition of "generation", especially the term "vital contact", as I believe it is at the core of Consumer DNA. It is not just what we learn and experience as individuals, but what we share with others that builds our identity and differentiates us from other groups separated by distance or time.

When I was growing up (I am a proud member of Generation X), "vital contact" meant sharing experiences, education, music, traditions etc., with a limited group of people, mostly centered in Mexico City. Keeping in touch with friends and relatives abroad meant mailing letters and waiting months for a reply (long distance costs were prohibitive). When meeting people my

age from other countries in Latin America we had few things in common. We were a business case for customization.

Millennials and the younger generation (born after Y2K), who is yet to receive a commonly accepted name (Generation Z, Gen Tech, and Gen Wii are used indistinctively), are growing in a world where the term “distance” has been erased by technology. They not only have access to tons of content, but can also create it, modify it, share it, comment it, etc. Videos, photos, events become viral in a matter of hours and shape opinions in all five continents. Communicating has never been easier or more accessible.

Other articles in Flair Mexico make a detailed account on social media as well as Childhood in Mexico, providing enough figures and background on the reach technology is having in Mexico. The “vital contact” described by Ortega has been replaced with “virtual contact” widening the reach of generations well beyond our borders.

My experience over the past two years in several different multi-country studies suggests that the younger generations in Latin America have more in common than any other previous generation, and that regional strategies/re-application is not only feasible, but the optimal way to go in many cases. It is obvious that these results cannot be generalized and each category/brand will face different challenges, but the tide has turned and any global or regional company should consider the new and exciting possibilities that technology is opening.

Companies and brands have to be closer than ever to consumers and understand how technology might be changing them and what implications it has on how they relate to brands and to each other. The younger the target, the higher the odds of having a common consumer DNA.

What can researchers offer to help in this new challenge?

How can Marketing Directors and Brand Managers know if their brands are ready for a regional strategy or for re-application? What advice could we give to the king?

Unlike fairy tales, there are no magic solutions to these questions, but we do have a few words of advice for our story king (especially if he is interested in courting a Millennial Mexican Princess!).

- Listen to what princesses have to say... They are talking (and writing) more than ever before! Social media is filled with information and all brands should be listening on what consumers are saying about them.
- If they are not talking, get them together and they will! Sometimes consumers will not openly talk or write about certain categories or brands, and thus social listening will not be enough. Online communities have proved to be a great option to get Millennials to talk about themselves and about brands.
- Ask princesses to participate in the education plan for Prince Charming. Younger consumers love to give their opinion and participate in the development process. Co-creation is here to stay.
- Trade places for one day (or at least try their crystal slippers on). Nothing helps better to understand a person than to be them for one day, and if that is not possible, to walk alongside and see how they live, decide, share... Ethnography and observation are becoming more popular than ever.
- Have fun! Millennials love to have fun and you should too!

[Song]

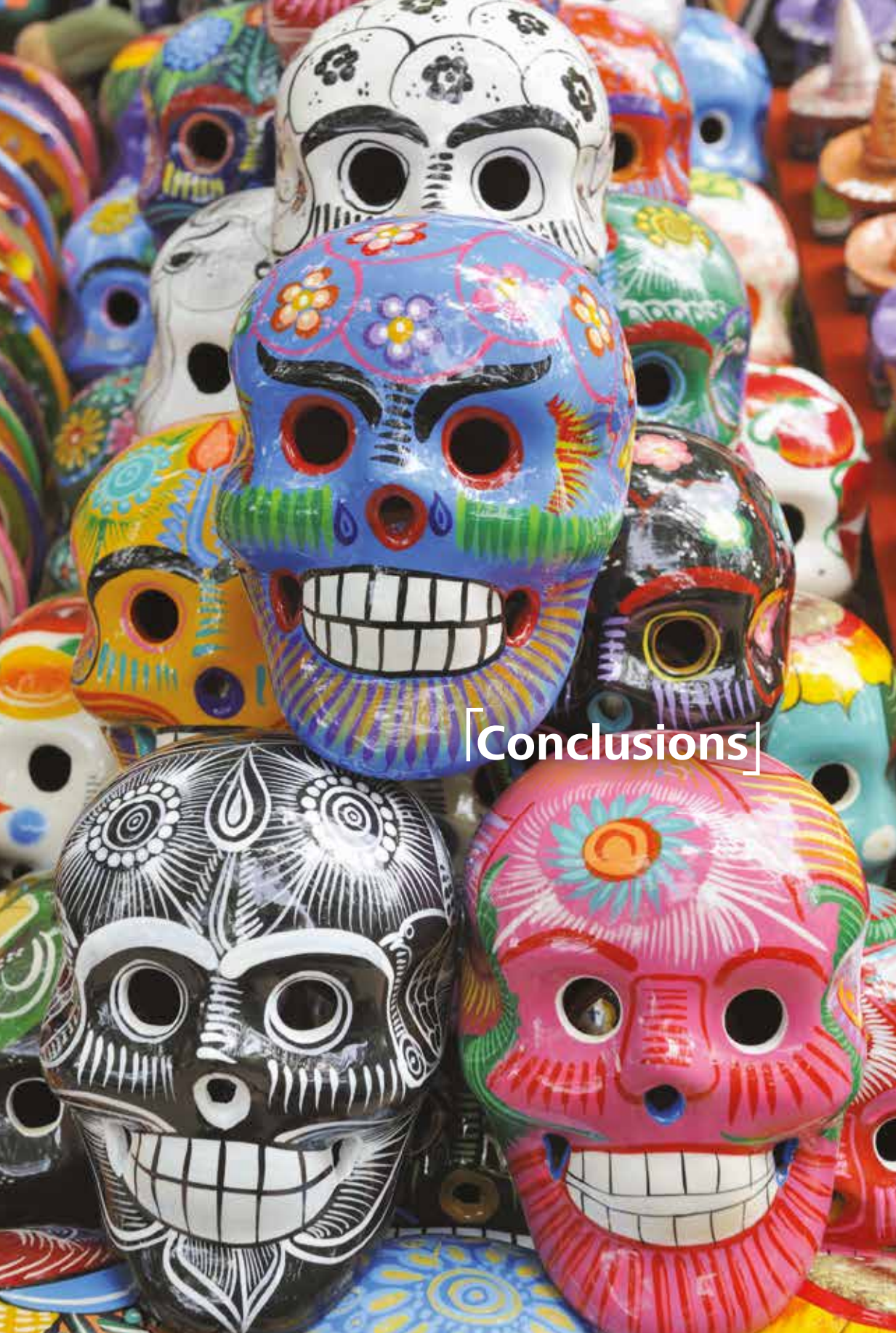
"Gimme tha power"

The police blackmail you (money!)
But they live out of what you pay
If they treat you as a criminal (thief!)
You're not to blame: thank the mayor.
The problem needs uprooting,
The government needs changing,
And so does the people that work in red tape,
People who like crumbs.
That's why I do nothing but complaining,
Because this is where I live and I am not an asshole.
Don't you see? Government jobs,
People getting fat rich.
People in poverty,
Nobody does anything because no one cares.
People on the top loathe you,
But more people wants their heads to roll.
If you give more power to power,
Harder they'll fuck you.
Once we were a world power,
But we are poor, we are mismanaged.

Gimme, gimme, gimme, gimme all the power
So we can mess you up.
Gimme, gimme, gimme, gimme all the power
So I can come around and bugger you.
Gimme, gimme, gimme, gimme all the power
Gimme, gimme, gimme, gimme all the power
That's about it, bugger! Fuck you, stupid bugger!

Because we weren't born where food is lacking,
We need not ask what we can do.
If they think we are lazy,
We are not so. Long live Mexico, motherfuckers!
Let Mexican power be felt!
Let it be felt! All together like brethren,
We are more, we pull together.
Why to follow a bunch of idiots
That lead us where it suits them?
It is our sweat that keeps them alive,
That gives them hot bread,
The bread of our people.

Lyrics and Music: Molotov™



「Conclusions」

Mexico 2016: the turning year

“Discontent”, “disappointment”, “distrust”, “pessimism”, “crime”, “poverty”, “corruption”, “insufficient economic growth”... The list goes on and on. The “crisis of confidence” involves politicians, brands, advertising, companies, etc.... Except for the individual, it would seem everything —public and private— is subject to harsh scrutiny.

The consequences involve different scenarios: frustration and rage, surrender and resignation, mobilization and action, the desire to jump and emigrate, the need to become involved and be as vocal as never before.

In any case, nothing will be as before. The desire to change, the appetite for alterations and alternatives, and the urge for new meanings are all coming together and culminating.

Internet growth, social networks’ expansion, versatility and curiosity offer new outlooks, as well as escaping or engaging solutions. They offer an inspiring field to communicate, to engage in conversation between brands and consumers, to invent, to progress.

Now, the rules have changed. Transparency, integrity, respect, caring and truth have to be on the map to rebuild or to create the confidence.

First and foremost, the key is in the balance between the power of the brands and the narcissism of the consumers, between public policy and the emancipation of citizens.

Good balance is the key to success and the future of Mexico. A turning year is coming.

There’s one thing we can say for sure. When it comes to Mexico, whenever things seem to be reaching a breaking point, the country and its people find ways to stave off the bad and cultivate the good.

Luana López-Llera and Yves Bardon (October 16th, 2015)

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「The experts」

Henri Wallard
Yves Bardon
Alex Grönberger

Row 2
Sandra Pessini

Ipsos México
Javier López
Carlos De Zúñiga
Selene Odriozola
Ricardo Salas

Row 3
Ipsos Marketing / UU:
María Eugenia Marbec
Erika Ruíz
Laura Romero
Alberto Mena
Israel Gudiño
Magali Rodríguez
Lina Fragosó

Row 4
Enrique Esquer
Federico Borenstein
Stephanie Haidenberg
Guillermo Hoffmann

María Elena De Villa
Rafael Muñoz-González
Aldo Casillas

Row 5
Ipsos Connect:
Constanza Segura
Abigail Leal
Berta Morales

Ipsos Public Affairs:
Fernando Miño
Paty López
Analí Castillo

Row 6
Ipsos Loyalty:
Jesica Bastar

Ipsos HR:
Isaac Pérez

Editorial Coordination:
Cécile Reynaud
Luana López-Llera
Design & Communication:
Daniel González Terán

Coordination
translations:
Jaqueline Rizo
Logistic Coordination:
Federico Borenstein
Editing, proofreading &
translation:
Mauricio Sanders
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Our 30 experts are pleased to
present the first edition of
Ipsos Flair Mexico.

With them, you can learn how
to take studies a step further
in order to discover the true
values and expectations of
Mexicans, where analysis
meets intuition.

