

# Ipsos ASI Reflections

Inspiration for Action

## INSIGHT FROM THE EMERGING MARKETS



**Ipsos ASI**  
The Advertising Research Specialists



# CONTENTS

<b>OPTIMIZING ADVERTISING ROI IN ASIA PACIFIC</b>	<b>3</b>
<b>THE INFLUENCE OF CULTURE ON CONSUMER RESPONSES TO RATING SCALES</b>	<b>9</b>
<b>ON LOCAL GROUND: CHATTING ABOUT DIGITAL WITH SABMILLER RUSSIA</b>	<b>13</b>
<b>ON LOCAL GROUND: LIKE DEATH AND TAXES, DIGITAL RESEARCH IS A CERTAINTY, IN MARKET RESEARCH AND LATAM LIFE</b>	<b>14</b>

# OPTIMIZING ADVERTISING ROI IN ASIA PACIFIC

By Keith Spencer, Director of Product & Knowledge, Ipsos ASI Asia Pacific

Given the current economic times, marketers are looking to optimize every dollar invested that support brands so as to maximize any competitive advantage they can. In reviewing TV advertising response together with media buying practices throughout Asia Pacific, we see considerable potential for improving advertising ROI across the region.

## Introduction

For 50 years, Ipsos ASI has been measuring response to advertising, providing insight to how consumers react, 'on average', to advertising exposure. A key insight is that, despite differences in media environments, the patterns we see across countries are remarkably similar: **there is little difference in ad response between mature and emerging markets.**

But despite this similarity in consumer response, the media data we capture indicates vastly different media buying practices between the two. Weekly TRP levels in emerging markets are considerably higher and far more enduring than those in mature markets.

So, we asked ourselves whether:

Advertisers in emerging markets routinely over-invest in advertising

Advertisers in mature markets routinely under-invest in advertising

Or if the reality is somewhere in between.....

...to determine if there is significant opportunity to improve the level of ROI ultimately achieved by ad campaigns throughout Asia Pacific. For simplicity's sake, we focused our exploration on TV, as it is the highest costing medium (with more potential for upside gains).





## Consistency of Ad Response across Different Markets and Categories

When evaluating advertising performance within Asia Pacific countries, a couple of standard questions usually emerge:

What specific benchmarks apply to my country?

What specific benchmarks apply to my category?

These concerns are prompted by the widely held belief that categories and countries differ substantially, and this must be allowed for in assessing the success of any advertising. However if one looks at both propositions, there is a remarkable global consistency in the way advertising is processed, recalled and acted upon.

This is hardly surprising. Studies of cognition the world over indicate that individuals process information in a similar fashion. So there should be similar amounts of advertising recall from country to country. Residence in Manila or Melbourne, Bangkok or Beijing makes little difference. Similarly, it doesn't matter whether automobiles or washing powders are being advertised, recall levels are pretty consistent.

Time and time again, we see that the biggest levels of variation have little to do with country or category. Rather they reflect the style and quality of the advertising content itself. In fact ~75% of the variance we see in the ability of ads to cut through is determined by the quality of the creative.

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And, while there are differences in each country's media environment, they are not really THAT different. In most markets, ads are interspersed through every 12 or 15 minutes of programming and GRPs, TRPs or TARPs (henceforth referred to as GRPs) represent a consistent ad investment currency (based on the % of viewers reached multiplied by the frequency of ad exposures).

We have thousands of cases where consumers' ability to recognize and correctly brand TV advertising is measured against accumulated GRP levels.

The data demonstrates that prompted ad recall builds quickly in a convex, "C" shaped curve with diminishing gains, where each additional cumulative exposure is less efficient than the one before.

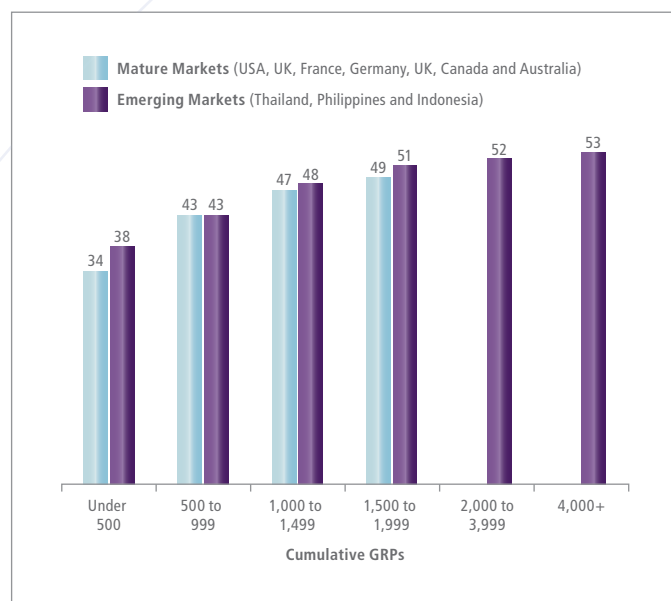
- In mature Western markets, the recall curve peaks around 1,000 cumulative GRPs, and gains are minimal beyond this point.
- In emerging markets, the peak is closer to 1,700 GRPs, but the basic shape of the distribution is identical.



This is consistent with the build in cumulative reach associated with an advertising schedule, suggesting that ad cut through is associated with the reach of a campaign rather than frequency of exposure (which builds in simple linear fashion).

Globally, the average commercial is recalled by around 50% of consumers - whether in mature or emerging markets. Similarly, around 50% of those recognizing the ad will also successfully recall the brand being advertised.

Figure 1. Advertising Recognition By Cumulative GRPs – Emerging Versus Mature Markets



(Ipsos Tracking Databases 2008 to 2011)

## The Inefficiencies from Over-Investment Evident in Emerging Markets

If there are similarities in TV advertising response across the globe, one must ask why it is common practice to buy two or three times more GRPs in emerging markets. Clearly consumers are not less inclined to remember ads to which they have been exposed.

The explanation rests with a combination of market conditions, media buying philosophy and simple mathematics:

There is a widespread view that in order to be a successful player, you have to match the share of voice of your main competitors

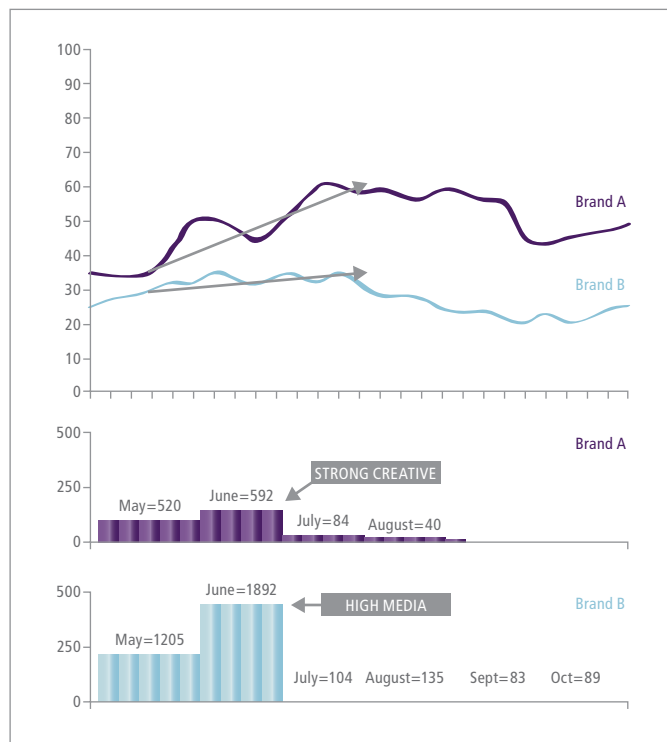
Growth rates are consistently higher in emerging countries, so greater relative ad expenditure can be justified more easily than in mature economies

The cost of GRPs is relatively inexpensive in emerging markets, so there is less scrutiny on expenditure

Given the above points, it is not surprising that advertisers usually take the safe option and buy **A LOT** of GRPs. Unfortunately, the premise behind this approach is largely flawed. In addition, it generates some undesirable consequences.

While share of voice is associated with market success, strong creative makes a far more important contribution. If you have strong creative, you don't have to match your competition's media investment in order to cut through market clutter. However, investing heavily in a weak piece of creative, simply to match competitor ad investment, is an ineffective and costly strategy.

Figure 2. Creative Quality is More Important than Share of Voice. Strong Creative has a Much Greater Effect Than Lots of Media



(Ipsos North American Tracking Example)

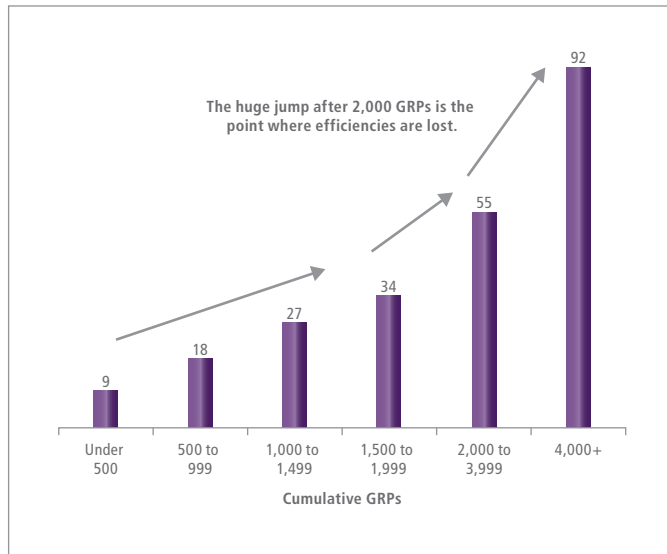
In addition, VERY heavy GRP investment actually impacts ALL the advertisers in the market. Given there is a finite number of daily GRPs on offer, heavy purchasing by all players simply lowers the reach and raises the frequency of the available GRPs. This, in turn, delays the cut through of the advertising. You have to buy considerably more GRPs to achieve the same peaks evident in mature, lower spending markets. The result? The higher average GRP investment associated with peak recall levels in emerging markets is primarily a self-fulfilling prophecy, fostered by local media buying practices and philosophy.

A strong case can therefore be made for reducing excessive expenditure in emerging markets - once a TV ad has achieved peak recall (at say 1,700 GRPs). (Conversely, investing more GRPs in lower spending, mature markets would allow a higher percentage of creative to actually reach its full potential.)

While it is easier to illustrate the benefits of adopting this approach on a case-by-case basis, in the high spending markets analyzed (Philippines, Indonesia and Thailand combined), at 1,700 GRPs, the average ad achieves 51% recognition. At 4,000 GRPs, the same ad would achieve 53% recognition. So more than DOUBLING the GRPs

(and associated costs) results in a 2% improvement in recall. This approach is clearly sub-optimal

Figure 3. Inefficiencies of Overspending – GRPs per Point of Recall Achieved



(Ipsos ASI Emerging Market Tracking Databases 2011)

One could argue that continued spending would continue to persuade consumers to buy the advertised product. While it is true that continuing the campaign will certainly remind people of the brand (and that can never be bad), persuasion does not continue indefinitely. We see that the greatest improvement in purchase intention normally occurs within the first 850 GRPs, suggesting that persuasion or any re-thinking of the brand happens early in the campaign. In North America this is the case for 81% of campaigns tracked. While it is likely that, on average, poorer quality GRPs in higher spending markets would extend the process, it is unusual to see significant persuasion effects beyond 1,500 GRPs (unless the building of reach was particularly poor).

## The Inefficiencies from Under-Investment Evident in Established Markets

While over-investing is very apparent in emerging markets, there is also a tendency to under-invest in TV across more mature markets. Factors contributing to this situation include:

**Tougher economic conditions**

**High media costs**

**The emergence of price brands**

**Greater interest in multi-media campaigns.**

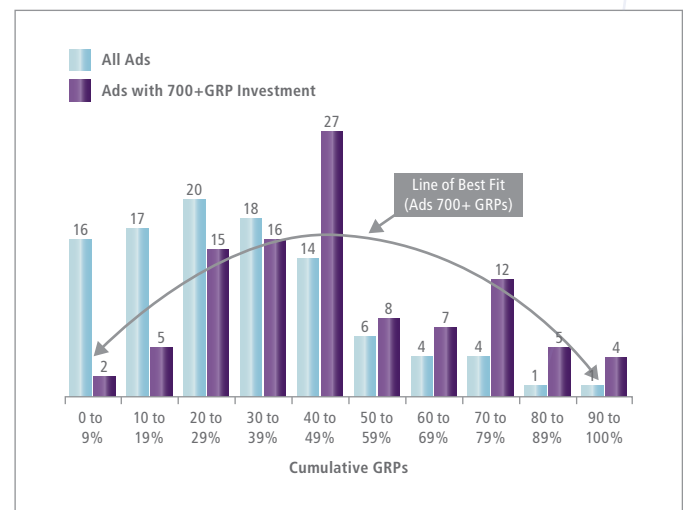
This results in a spreading of flat or declining marketing budgets more thinly across an increasingly diverse range of communication touchpoints.

While not as wasteful as over-investment, the challenge here is

more about giving creative the chance to perform at its maximum level. Producing strong creative and then 'strangling' its impact with insufficient support simply gives competitors an edge.

Recently, while reviewing global databases, it was noted that in Western Europe there was an unusually high number of ads with below average peak recall levels. As expected, the average number of GRPs per campaign was lower than those from other regions. When the ads with fewer than 700 GRPs were removed from the analysis, the results were similar to what had been seen in other regions.

Figure 4. The Problem of Under Investment – Recall Results for All Ads versus Those with 700+ GRP Investment



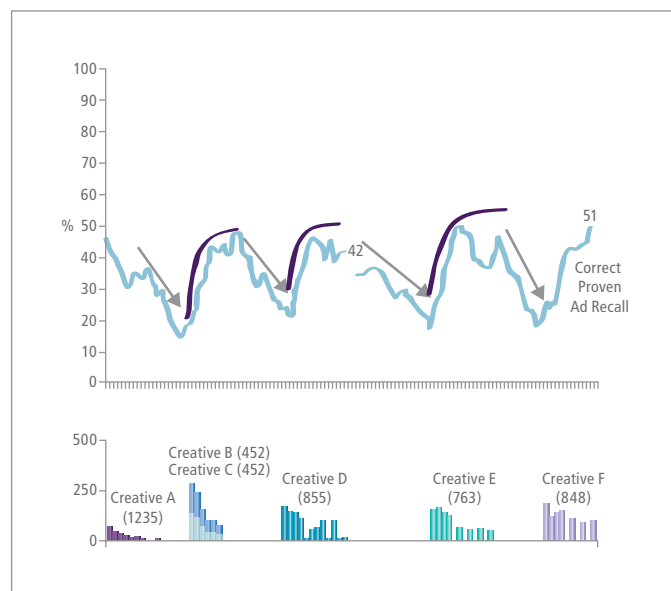
(Ipsos ASI Western European Tracking Databases – UK, France, Germany, Spain, Italy 2009)

Another low spending approach is the tendency to advertise in discrete bursts and then go off air for a long period of time until another burst can be afforded. But during the dark period a brand has fewer consumers with internalized ad impressions, diminishing the chance of its success. Coming back on air for another short, sharp burst of advertising after being dark for many months means much of the second burst is expended rebuilding the ad recall back to where it was. Not terribly efficient, given the initial burst never likely peaked.

**Wherever possible, dark periods should be avoided.**

Wherever possible, dark periods should be avoided. Given that all advertising campaigns suffer from diminishing returns, it is wise to remember that minimizing the 'down' is probably more important than maximizing the 'up'.

Figure 5. The Problem With "Going Dark". Resources are Wasted Rebuilding Recall



(Ipsos North American Tracking Example)

Clearly both spending too little or too much have significant downsides. While developing strong creative is the real key to effective communication, there are some obvious nuances to media planning which can further tip the playing field in the marketers' direction.

## Media Buying Solutions Based on Database Learning – Running the 'Middle' Course

As with most things in life, there are significant downsides to too much or too little. The ideal is somewhere in the middle. This is very much the case with advertising investment. There are issues with investing too much (you are paying for a lot of GRPs that are surplus to requirement) and not spending enough (the creative simply does not get the chance to perform).

Now there are obviously many things that can be done to make subtle improvements to media plans:

Target specific demographic or user groups

Buy particular day parts

Utilize different touch points that are more suited to specific campaign objectives

Incorporate calls to action with red buttons, click-throughs, etc.

Build the campaign around an event or opportunity to interact with the brand, etc.

However, in summarizing the insights discussed, a clear strategy emerges. If applied, you are likely to make more than a subtle difference to the success of TV advertising endeavors. These strategies reflect fundamentals for any successful TV advertising campaign. But these fundamentals only apply if the creative under

consideration is at least average. Again, **Creative is King**: around 75% of the success we see in advertising is attributable to the creative content and style of the ad itself.

The prompted recall of a campaign is much more associated with the reach rather than the frequency of the associated media plan

Significant diminishing returns set in around 1,000 GRPs in mature markets and 1,700 in higher spending emerging markets.

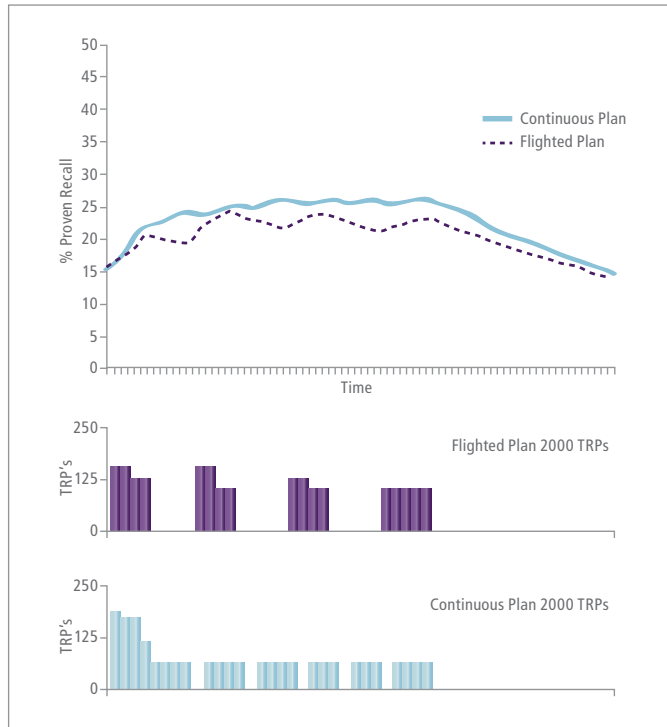
At this point, prompted recall levels stabilize and remain around their peak level. The success of the campaign is determined by the magnitude of the recall realized. Buying more GRPs beyond this point will not impact the recall level much and any rethinking of the brand (persuasion) has usually occurred earlier in the schedule.

Going dark with the advertising will result in recall levels declining back to typical historical levels. Coming back on air will require some time to build back to the peak recall level from the initial burst.

Putting these points together suggests that managing media (to ensure that there is no unnecessary wasteful spending on media in Emerging markets, and that good creative can succeed in Developed Markets) requires.

- That you build reach quickly and early in the campaign
- That you not buy too many weekly GRPs too soon. Buying too many early in a campaign will increase the frequency, but not the reach. While the optimum number is likely market and campaign specific, 120 to 150 per week is a reasonable guide for mature markets
- When the prompted recall of the campaign has peaked, only invest at maintenance levels (75 GRPs per week in mature markets) to preserve recall levels and to remind consumers of the brand. Funds saved by this approach can be invested in alternate media, touch points or creative development
- Short bursts of advertising followed by a dark period loses momentum for the brand and reduces its chances of success. A steady media presence is a more efficient proposition than having to seriously rebuild each time the brand returns to TV.

Figure 6. The Recall of Different Advertising Schedules (Modelled Proven Recall)



(Hallward, 2007 P. 189)

It is interesting to note that much of the “buzz” in current advertising and marketing literature focuses on the importance of 360 degree multimedia campaigns, utilizing as many digital elements as possible. There is less buzz around getting the fundamentals of TV advertising right. However, given that TV still forms the cornerstone of most marketing campaigns, and is still the most costly medium, gaining greater efficiencies can only be a good thing.

In addition, saving some of the TV media investment dollars in emerging markets offers opportunities to:

Partake in additional creative development (produce a larger, rotatable pool of TV ads?)

Invest in early stage research into your brand’s big idea and/or media channel planning and receptivity

Invest in newer, more interesting (and efficacious?) digital endeavors accordingly.

Overall, this can only put brands in a stronger position from **WITHIN THEIR EXISTING BUDGETS**. There is no requirement additional marketing expenditure, just a reorganization of the existing pie. Alternately the savings could simply be used to improve the brand’s bottom line.



If you want to find out more about **Media Receptivity** and **Touchpoint Optimization**, look for the following symbol in our upcoming articles. Upcoming topics include: media receptivity within the consumer journey, the power of in-store communications and packaging, and media planning and digital.





# THE INFLUENCE OF CULTURE ON CONSUMER RESPONSES TO RATING SCALES

By Martijn Kist, President, Product Development, Ipsos ASI – Global

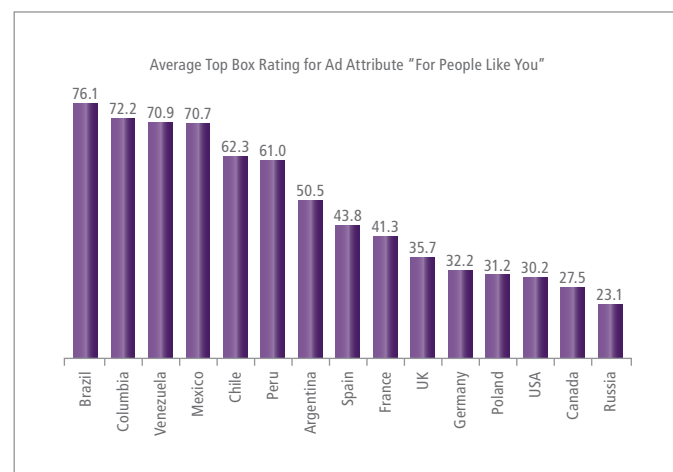
Often marketers are asked to develop and leverage advertising campaigns that can transfer globally from market to market. Our Lessons Learned on Global Advertising Transferability can help make that a reality. But what about managing global advertising research programs? Most researchers observe and agree that culture has an impact on how respondents use rating scales across the world. Are there lessons that can be applied? The answer is YES!

## What differences have we observed for brands and communications?

With any given survey response, it is difficult to separate the effect of culture, from that of the stimulus, from that of the test method. But in looking across our average responses to ads or brands across similar methods, we can start to isolate the effect of culture alone.

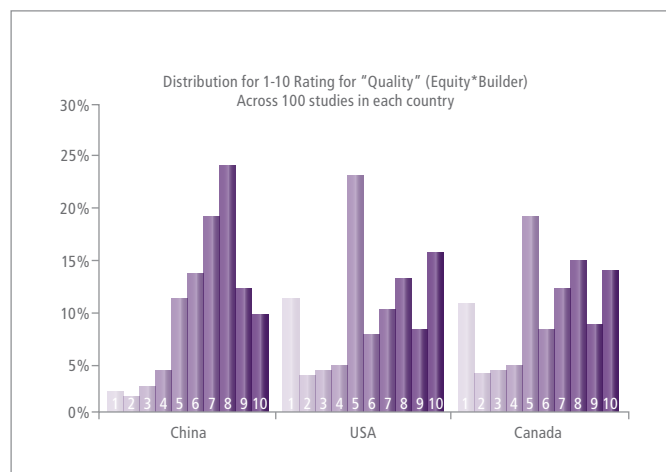
We note that:

1. Absolute levels of response vary by country



Source : Ipsos ASI Next\*TV (in home) database - 22 368 cases

2. and, the distribution of the responses varies by country



Source : Ipsos ASI Equity\*Builder database

## What is behind these differences?

There are 3 kinds of effects that cause these differences. These effects are not independent and can co-exist (or not) in any given country. They are:

**Social desirability:** the tendency of respondents to answer questions not according to their own opinion but according to social norms.

**Acquiescence and courtesy bias:** the tendency to agree with the interviewer or the question so as not to offend. It causes higher ratings for positive questions and lower ratings for negative ones. For example, in Latin America, consumers have difficulties in volunteering dislikes, so the 'dislikes' question has traditionally been placed before the 'likes' question.

**Extreme Response Style:** the greater tendency of some countries' respondents to select the end-points of a response scale when answering questions, while the opposite is the avoidance of end points, called middling response style. In general, extreme response is not as problematic as acquiescence is because it gives a true and clear answer. But it does become a problem when comparing scores of different samples of different cultures.

In parallel, there have been industry debates about what **the appropriate number of points on a scale for global research** should be. This debate is underlined by the idea that the use of a scale is influenced by the mark system in school (e.g. 1 to 6 in Germany, 0 to 10 or 20 in France) or by other meaning of numbers (e.g. 8 has connotations of good fortune in China, where 4 is associated with misfortune). The main consequence of this is that a scale that seems logical in one country might not be as logical in another;

## Can culture help explain the differences in response style?

Given that the various effects on response style are not independent and can be present (or not) in any given country, we sought to understand whether the *net effect* on responses can be explained by culture.

Culture, in the simplest sense, is "a set of socially transmitted ideas, information, values and sentiments stored in people's heads"<sup>1</sup> that varies by country, most likely depending on history.

Dutch anthropologist Geert Hofstede has proposed **4 main dimensions of culture** along which each country can be measured:

**Power Distance:** Power distance is the extent to which the less powerful members of organizations and institutions (like the family) accept and expect that power is distributed unequally.

*Ipsos ASI's hypothesis is that respondents from high Power Distance cultures would be more vulnerable to social desirability and acquiescence.*

**Individualism:** Individualism on the one side versus its opposite, collectivism (in a non-political sense), is the degree to which individuals are integrated into groups. On the individualist side are societies in which the ties between individuals are loose: everyone is expected to look after herself and her immediate family. On the collectivist side, are societies with strong, cohesive in-groups, often extended families (with uncles, aunts and grandparents) in which people from birth onwards are integrated and protected in exchange for unquestioning loyalty.

*Ipsos ASI's hypothesis is that respondents from collectivist cultures would lean more towards harmony and generally give better ratings (courtesy bias and acquiescence). We believe that respondents from individualistic societies would use the extremes of the scales more.*

**Masculinity:** Masculinity refers to societies with clearly distinct social gender roles; femininity reflects societies where social gender roles overlap. In masculine societies, values such as assertiveness, toughness and competitiveness are generally more important than those descriptive of feminine cultures (tenderness, modesty, and care).

*Ipsos ASI's hypothesis is that the assertiveness and decisiveness of masculine cultures would lead to a higher tendency towards extreme response behavior. And, since competitiveness plays an important role, the negative end of the scale would be used more.*

**Uncertainty Avoidance:** Uncertainty avoidance deals with a society's tolerance for uncertainty and ambiguity. It indicates to what extent a culture "programs" its members to feel either comfortable or uncomfortable in unstructured situations.

*In terms of response style, Ipsos ASI's hypothesis is that the extreme response style would be more common in cultures that emphasize certainty.*

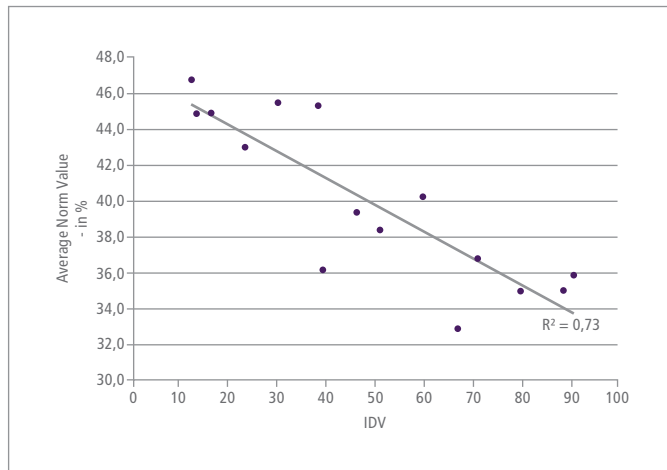
<sup>1</sup> Lee Cronk, "That Complex Whole, Culture and Evolution of Human Behavior", Westview Press, 1999

Below are the Hofstede Indices for a selection of countries, with a reminder that in any given country all four dimensions act together.

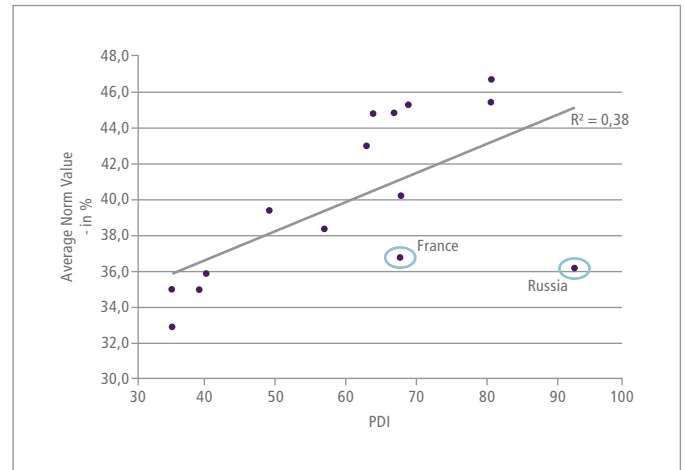
Selected Hofstede Indices				
	Power Distance	Individuality	Masculinity	Uncertainty Avoidance
BRAZIL	69	38	49	76
CHINA	80	20	66	30
FRANCE	68	71	43	86
GERMANY	35	67	66	65
INDIA	77	48	56	40
JAPAN	54	46	95	92
MEXICO	81	30	69	82
POLAND	68	60	64	93
RUSSIA	93	39	36	95
SPAIN	57	51	42	86
TURKEY	66	37	45	85
UK	35	89	66	35
USA	40	91	62	46

www.geert-hofstede.com

In comparing the average responses from our databases to these 4 dimensions for each country, we determined that **Individualism** and **Power Distance** are the dimensions that most explain the differences in results, with Individualism being the biggest contributor.



Source: Christine Albrecht, The Impact of Culture on Response Pattern in Cross-National Market Research, April 2009, Bachelor Thesis University of Applied Sciences Stralsund, Germany & Technological University Gdansk, Poland.



Source: Christine Albrecht, The Impact of Culture on Response Pattern in Cross-National Market Research, April 2009, Bachelor Thesis University of Applied Sciences Stralsund, Germany & Technological University Gdansk, Poland.

So yes, culture does explain response styles. Knowing this gives us a way to better *interpret* them and even to predict the response styles we can expect for a given country.

## What does this mean for designing and interpreting global research programs?

### 1. Responses cannot be compared numerically across cultures.

*A purchase intent score of 80% in Argentina versus a score of 40% in Germany does not mean that Argentines are twice as likely to purchase the product.*

### 2. Responses can be compared within a culture (e.g. users are more likely to buy than versus non-users, or attribute "x" is higher than attribute "y").

*However, valid comparisons between pieces of research depend on consistency in the research method and the specific context, not just the rating scales and the culture.*

### 3. KPI's might need to be adjusted to culture

*In cultures with high acquiescence, it may be useful to base the research conclusions on the "top box" results (agree completely, definitely will purchase) while in other cultures Top 2 box might be more discriminating.*

### 4. To compare responses across cultures, you need to introduce a normative value for that culture. Responses relative to norm can then be compared across cultures.

*That is why at Ipsos ASI we always compare results to local norms, or if not available to a culturally relevant norm derived from the information above.*



5. When designing research, be as clear as possible in response choices and measurement techniques

Where possible, **we recommend using full semantic scales** (each response is explained by a statement) which are less sensitive to the influence of the scale chosen. For some questions that will not be practical, and in that case a numeric scale can be used (with the extremes clearly labeled and the results compared to local norms).

We also recommend choosing more universally accepted scale systems when semantics can not be used. Due to the prevalence of the decimal system, a standard 10 point scale is the most "logical" choice.

Rely on comparative observation (such as test-control comparisons) or derived results (e.g. drivers analysis to determine impact of variables) rather than literal interpretation of expressed attitudes or intended behavior.

So, as with Global Ad Transferability potential, there is considerable cultural effect in responses to brand communications. And as with ad transfer, this can be controlled for by sound research design and informed interpretation.

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Culture does explain response styles. Knowing this gives us a way to better interpret them and even to predict the response styles we can expect for a given country.

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## ON LOCAL GROUND: CHATting ABOUT DIGITAL WITH SABMILLER RUSSIA

In Russia, digital expenditures now exceed print and out of home expenditures, and are second place behind television. They now comprise 16% of total spend and are still growing (up 56% last year alone).

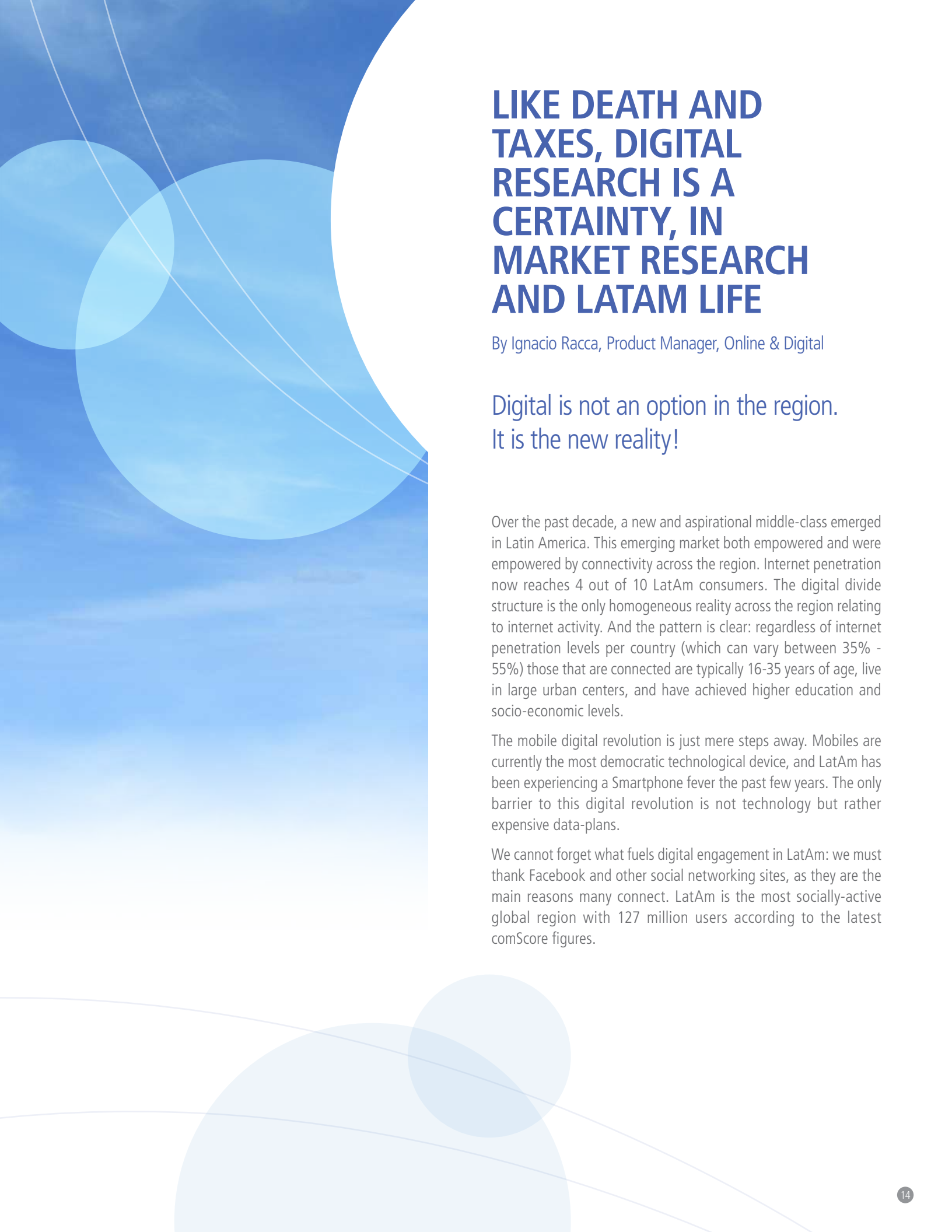
As our local SABMiller client reminded us, Russia is one of the largest online markets (if not the largest) in Europe, and one of the heaviest users of social media worldwide. Making the most of digital marketing is critical and some evidence demonstrates the ROI potential is significant.

So what did our SABMiller client have to say about online Russians?

- 1) Internet (and mobile) is growing rapidly in Russia because it allows the population to interact – it helps them overcome the vast 17Million Km2 size of the country
- 2) Russia-specific digital properties (not global properties) are still at the top of web property rankings in Russia – with Yandex and DST sites amongst the most accessed.
- 3) Social media sites are also very important to adult Russians as a way to connect one-on-one and to converse. But that does not mean Facebook is #1. Local social media sites are still the most widely visited – like Vkontakte.ru (VK) and Odnoklassniki – just to name two.

And what points did he make about digital communications research?

- 1) It is easy and inexpensive to track online behavior with programs like Google Analytics, but business decisions must still be informed by consumer research to understand what is behind the behavior.
- 2) But that consumer research cannot just be a TV research model applied to digital – it has to be a digital model applied to digital. It has to reflect how active and interactive the medium is.
- 3) And it has to be as fast as the digital medium – it can't take months for data and insight to be available because the brand and the medium have moved on.



# LIKE DEATH AND TAXES, DIGITAL RESEARCH IS A CERTAINTY, IN MARKET RESEARCH AND LATAM LIFE

By Ignacio Racca, Product Manager, Online & Digital

Digital is not an option in the region.  
It is the new reality!

Over the past decade, a new and aspirational middle-class emerged in Latin America. This emerging market both empowered and were empowered by connectivity across the region. Internet penetration now reaches 4 out of 10 LatAm consumers. The digital divide structure is the only homogeneous reality across the region relating to internet activity. And the pattern is clear: regardless of internet penetration levels per country (which can vary between 35% - 55%) those that are connected are typically 16-35 years of age, live in large urban centers, and have achieved higher education and socio-economic levels.

The mobile digital revolution is just mere steps away. Mobiles are currently the most democratic technological device, and LatAm has been experiencing a Smartphone fever the past few years. The only barrier to this digital revolution is not technology but rather expensive data-plans.

We cannot forget what fuels digital engagement in LatAm: we must thank Facebook and other social networking sites, as they are the main reasons many connect. LatAm is the most socially-active global region with 127 million users according to the latest comScore figures.



Main Social Network Sites in Latin America by Unique Visitor  
April 2012

Total Internet: Visitors Age 15+ Accessing at Home/Work

Source: comScore Media Metrix

	Total Unique Visitors (000)	Average Minutes per Visitor
<b>Social Network Category</b>	<b>127,346</b>	451,0
Facebook.com	114,496	460,0
Twitter.com	27,371	22,5
Orkut	25,717	96,6
Slideshare.net	12,811	3,6
LinkedIn.com	10,467	8,8
Tumblr.com	7,239	39,0
Badoo.com	6,128	70,1
Myspace	5,441	3,6
Deviantart.com	5,260	17,0
VK.com	4,910	14,9

1 out of every 4 minutes spent online in LatAm in April 2012 were on Facebook. This is a great illustration of LatAm's digital consumption.

While this is interesting in a big picture context, how does this help you? That is a basic question that we are still trying to determine. Only a deep understanding of how your target consumers are engaging online, and how your brands could benefit from new ways of interacting, can unlock the mystery.

Digital has added a new layer of complexity. It provides huge amounts of new potential touch-points, new ways for you to communicate online with your target, and even offers a venue to listen to what they are saying. While we believe that, in this sense, our clients are local leaders in their understanding of how to benefit from digital media and these new potential touch-points (because, they are experimenting with how to communicate in new ways and learning from what we advise), we ask ourselves, **can we also learn from our own recommendations?**

## What we can learn from our clients to engage with consumers online

It is interesting to note that there is some digital research resistance in LatAm, despite the effective use of the medium as a communications vehicle. Accessing and listening online is not only natural but a must for any research firm in LatAm.

**We've learned a lot about using digital to communicate with our audiences, but what is of particular interest (and almost more important than what we have already learned) are the lessons we have yet to learn – especially in the areas of listening and research. Those future lessons will ultimately guide and drive the next phases of the digital marketing era.**

Digital Marketing and Communications Lessons Learned	Digital Research and Listening Lessons Learned
<p><b>Understanding how your consumer is engaging online is critical when defining your communication approach and media mix.</b> If they are not connected or not open to interacting with you online, a digital campaign will only represent a lost investment.</p>	<p><b>Understand how your target universe is engaging online is critical when defining your research approach.</b> Do not force online methodology if your target is not connected. This will result in poor data quality and even poorer insights.</p>
<p><b>Do not focus on platforms, rather focus on the Big Idea. Then see how you can benefit from digital consumer engagement for better deployment.</b></p>	<p><b>Do not focus on migrating to online but rather focus on the Big Insights and how you can benefit from this new way of research to obtain fresher and better ones.</b></p>
<p><b>There is space for brand networking in the region but the challenge is to overcome intrusiveness.</b></p>	<p><b>There is space for digital research in the region but the challenge is to overcome intrusiveness when accessing consumers.</b></p>
<p>Be aware that for many of your consumers, an internet connection is still aspirational and they do not have the amount of time you wish. <b>Engage them with simple promotional mechanics and fast rewarding dynamics.</b></p>	<p>Be aware that Internet connection is still aspirational and respondents do not have the amount of time you wish. <b>Engage them with simple survey mechanics and fast rewarding dynamics.</b></p>
<p>Forget about massive one-size-fits-all communications if you want to engage and have impact. <b>Integrate different data-sources so you can better customize your content and be more relevant to consumers</b></p>	<p>Forget about massive one-size-fits-all questionnaires or research approaches if you want to engage and understand. <b>Integrate different data-sources so you can better customize your data collection instrument and access your key target.</b></p>
<p>Emotions influence decision making. <b>When communicating online, not only rely on rational direct messages or verbal communications but leverage and benefit from interactivity to enhance your brand's desirability</b></p>	<p>Emotions influence decision making. <b>When asking online, leverage and benefit from interactivity and from implicit measures and impulsive data collection.</b></p>
<p>If they are talking about your brand with their friends, their voices are more trusted your brand's voice - even if you don't wish to listen to what they are saying. <b>Online buzz and Earned Media have a critical reach and impact on your brand.</b></p>	<p>For the researchers reading this, please try not to blush here when answering:</p> <ul style="list-style-type: none"> <li>• <b>How familiar are you with Buzz Monitoring and Social Listening tools?</b></li> <li>• <b>How comfortable do you feel in knowing the impact of Earned Media in your Brand Equity?</b></li> </ul>
<p><b>Do not focus on reach but rather think in Receptivity of your message.</b></p> <p><b>Understand when and where you are reaching your targets and how you are trying to engage with them. Consider using Location based systems to go where they are when communicating to them.</b></p>	<p>We have a whole new world of opportunities to explore, so let the conversation flow...</p> <ul style="list-style-type: none"> <li>• <b>How can we benefit with Location based systems to listen to them in situ?</b></li> </ul>



By thinking about our industry through our clients' eyes and how they benefit from digital, clarifies the big opportunity market research firms have today. A large amount of the targets we research and interact with on a continuous basis are now showing high levels of digital engagement. We should listen to them in this way as much as they are talking to us.

That said, we recognize that we ourselves are a real barrier. Clients are asking for digital in the region and are looking to us to partner with them while they experiment with new ways to interact with their consumers. Sometimes, we need to take a step outside the client-researcher bubble.

## Focusing on the big picture with a bit of inspiration

In these moments, we always find inspiration in two great sources: (a) The Beatles and (b) Network mindset

### (a) The Beatles Therapy

Hey Jude, don't make it bad  
Take a sad song and make it better

Yes, we definitely need to adjust our instruments and make them better fit this new reality.

And anytime you feel the pain, hey Jude, refrain  
Don't carry the [online] world upon your shoulders

We've often heard "How does this work in the online world? I am not familiar with it at all. Please help." "Maybe that is what happens in the US or in the UK, where all the consumers are connected, but not here." It is a strange and crazy place, this online world.

The online world seems unfamiliar, far away, and hard to reach. It is as if it only really exists outside this world for LatAm researchers. Because of this, moving online is seen as more of a burden than an opportunity.

The minute you let her under your skin  
Then you begin to make it better

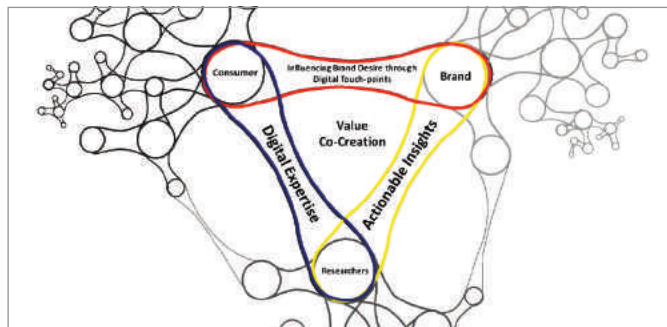
It helps to remember that practically all LatAm researchers fall into the highly connected group we are trying to reach and research: 16-35 years old, who live in major cities and have achieved higher education and Socio Economic Levels. We use Facebook as much as our targets do. It's not a separate world at all. It is our reality.

To start making it better, perhaps we should not connect to another world, but connect to ourselves, our day-to-day interactions, and the place digital has in our lives in LatAm.

We can always find inspiration within the digital mindset to connect the dots within a network.

### (b) Network mindset

We learned from the network mindset that value resides in the interaction rather than in the isolated parts. Value is co-created!



### Touch-points Linking the Brand with the Consumer:

The complexity of marketing in the Digital Era is rooted in the larger number of new potential touch-points and ways to connect with the consumer. Value is co-created online while consumers interact with the various digital touch-points.

Focusing on these Digital interactions leads to the following questions, that if answered, will help you reach your objectives:

- What are the critical touch-points where the consumer interacts with the brand? What roles do those digital touch-points play when compared to traditional ones?
- How are these touch-points impacting the Consumer Journey (from Awareness of new products, deciding where to purchase or for just keeping in touch with the brand)?
- How is your consumer researching your products online? Are they even researching?
- How are we, as researchers, helping you to be relevant within these interactions?
- What role does the consumer voice have here? Is it more relevant than Brand voice?
- Is there any ReTransmission of your messages? Is ReTransmission by consumers being shaped by their Closeness with the brand?
- Are these User Generated branded comments helping to reinforce your brand's Big Idea? How are these messages impacting your Brand Equity?



Linking ourselves to the network: Focusing on the generation of actionable Big Insights, market research innovation should always be based on our understanding of new ways of interaction.

**Market Researcher Digital Expertise:** We will be able to add value to our relationship with you and enhance our market research methodologies based on a deep understanding of the new ways consumers are interacting online.

- How can we benefit and generate better Insights from a new way of interacting with these consumers?
- Are we using all the User Generated Media in our research?

**Delivering actionable insights:** Please remember that in the Big Data Era, adding more data reduces value. Big Data represents a big opportunity to deploy better insights and help you co-create better Big Ideas. Replicating old approaches in a new context will end in useless outputs.

- Are we adding value and generating Insights or just collecting data?
- Are we connecting with our clients in a way that we can learn from their digital experiences?

Certainly we still have many questions to sort out as an industry. We are living in a fascinating time for market research, where we should redefine ourselves and our tools to better fit this new way of interaction. I strongly believe we have everything we need to win this race and keep our clients in LatAm ahead of the game.

Just... think online!

# Ipsos ASI Reflections

## Inspiration for Action

Reflections is a recurring thought leadership initiative and resource for clients of Ipsos ASI.

Each edition features insight, research, viewpoints from country leaders, and creative examples to help you maximize your brand, communication, and advertising efforts.

### About Ipsos ASI

Ipsos ASI is a leading global research agency specializing in advertising and brand communications. Offering state-of-the-art research solutions that employ measures predictive of in-market performance, our research helps clients build stronger brands.

Our areas of expertise include all aspects of advertising development and in-market evaluation across traditional and emerging media. Ipsos ASI's goal is to help clients deliver the right message at the right time across the right media to deliver the best return for their brand.

The Ipsos ASI team of brand and communications research experts is a global community of specialists who are passionate about advertising. From concept development to production, from final execution and into post-implementation performance, we help inform client decisions at every stage of the process.

To learn more about Ipsos ASI, visit [www.ipsos.com/asi](http://www.ipsos.com/asi)

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Ipsos ASI is a member of the Ipsos Group, a leading global survey-based research company. Ipsos member companies offer expertise in advertising, customer loyalty, marketing, media, and public affairs research, as well as forecasting, modeling, and consulting. With offices in 66 countries, the Paris-based company was founded in 1975.

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