

CULTURAL INTELLIGENCE

How can brands and communication travel across cultures?

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AUTHORS

Arnaud Debia

Carine Baladda-Brenas

Louis Rougier

Sandro Kaulartz

Radhecka Roy

IPSOS VIEWS

GAME CHANGERS

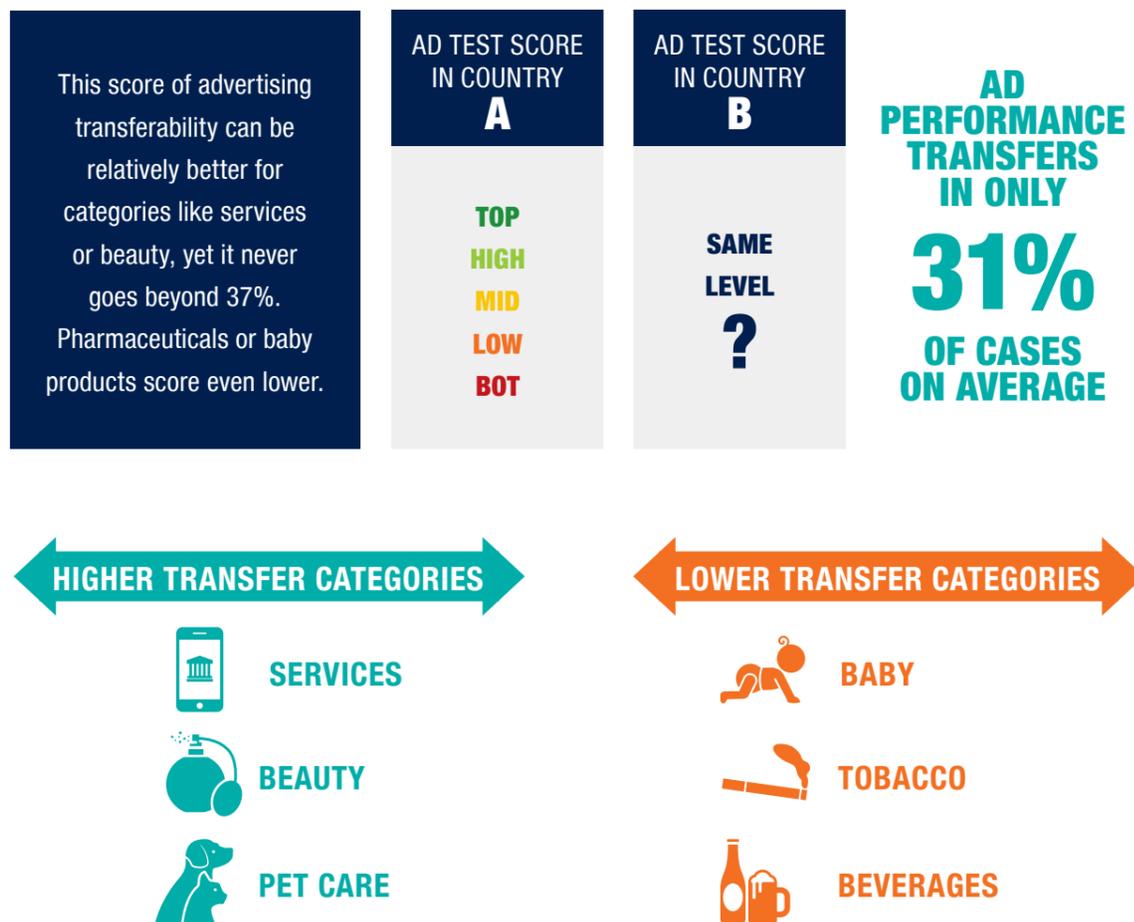


Technology, communications, transportation and cultural exchange platforms or social networks like Spotify, Netflix have truly made the world closer, smaller. You are never more than 20 hours away by plane from someone across the globe. You can Zoom or WhatsApp anyone instantly, whether they live in your neighbourhood, or are one or two continents away. And the moment a new series of 'Stranger Things' or 'The Boys' is out, you can watch it in any language of your choosing and discuss it as soon as it is released with friends in Canada, Japan or Denmark, or with colleagues over a Teams meeting.

Yet when it comes to brands, creative ideas and communication, it is a big world after all.

Ipsos Creative Excellence conducted a meta-analysis of more than 1,200 ads that had been tested in at least two countries. Each ad's performance was compared to identify whether it performed identically in the two countries or not. Looking at all the ads tested, we were able to calculate the probability that an ad would transfer with the same performance, on average (through using our Creative Effect Index which combines attention and short-term brand

Figure 1 Ad performance rarely transfers from one country to the next



Source: Ipsos Global Pretest Database

effects). The result was shocking: on average only 31% of ads achieved the same performance in two countries.

It looks like flipping a coin will yield better chances and we expect very few brand builders would be happy to see their advertising effectiveness drop to such a low level by crossing the border, e.g. from Great Britain to France, when expecting it to be average. This would mean a waste of money and almost no impact at all. And when we are shifting our analysis to look at longer-term brand effects (brand performance, brand closeness), the transferability rate remains the same.

What is also interesting to notice is that creative advertising transferability can reshape some geographies. If one were to ask where a US ad would perform the best in a choice of Brazil, Great Britain or France, many would certainly

vote for Great Britain – assuming the shared language and some common historical roots would be enough to guarantee a safe travel. A few would perhaps assume that Brazil, being geographically close, would be a good bet. Yet our meta-analysis shows otherwise: France is actually the closest to the USA when it comes to ad transferability. Part of the explanation might come from the unique and specific tonality of British advertising, which makes it an island difficult to land on, while US and French advertising styles might be somewhat closer.

While this analysis has been designed for advertising specifically, this transferability also applies when looking at brands and their innovation. And, as surprising as this is, there is a simple explanation to the challenge behind brand and communication travel: cultures.

Figure 2 How ads perform differently from region to region



Ads in Europe have a less than a 30% chance of successfully transferring to Africa or Asia. The picture just gets slightly better when looking from North America to Asia where we are getting close to a 50% chance of seeing the same performance.

Source: Ipsos Global Pretest Database

CULTURES: DRIVING SUCCESS FOR CROSS-BORDER MARKETING

Culture is a portfolio of values, beliefs, traditions, rituals, habits, symbols and codes that can manifest in many different ways, such as what you eat, what makes you laugh and what you think about gender roles.

Understanding the cultures of the world is not easy, for three reasons:

1. Cultures are **unconscious**: it is “what remains when you have forgotten everything”. So, it becomes a challenge for researchers. It would be useless to ask a Japanese person “well, can you tell me about Japanese culture?” We need to work differently
2. Cultures are in **constant evolution**: a previously minor element can become central over time
3. Cultures are **local** and can be very different from one country to another, but can also differ between ethnic groups within the same country. While our analysis focuses on country-to-country datasets, we could also take the same approach with different language or ethnic groups, e.g. French speakers vs Flemish speakers in Belgium or urban vs rural cohorts in France.



Figure 3 How different cultures perceive the world

How different? We sent 10 themes to our local teams in 25 different countries, and asked them to send back pictures that would typically illustrate these themes in their countries. Let's look at some results.



Through these examples we can see very different contexts, mindsets, codes, and styles. Each theme creates a specific cultural map that doesn't correlate with the geographical map. Suddenly, Italy may feel closer to China than France.

Source: Ipsos Cultural Trek exercise

THE METHODOLOGY FOR UNDERSTANDING CULTURAL TRANSFERABILITY

Ipsos studied various empirical models to identify the critical dimensions of culture that best inform us of the probability of successful cultural transferability. This helps us understand areas of similarities and differences, and their implications for optimising how we activate/deploy cross-border communication and engagement. Understanding the culture, and then integrating this with market, category and brand context, helps us build strong transferability recommendations.

What are these cultural dimensions? We look at four in particular:

1. The codes of communication and engagement within a culture:

How do people communicate and engage with each other? Is it an explicit mode of communication – with most concepts having a universal meaning (e.g. America) or is it an implicit and high-context culture – where concepts can take on different meaning, based on the contexts? This dimension has direct bearing for specific situations, contexts, symbols and messages we use in communication. In terms of the spectrum, cultures can have **implicit** or **explicit** codes of communication/engagement.

2. Aspiration and the source of motivation:

Is it internal, individual and personal – or is it external and social? This helps us understand the aspects that drive imagery, persuasion devices (e.g. celebrity endorsements vs user testimonials) and what moves people within a culture. We would cluster these as those motivated by **social respect** or by **personal achievement**.

3. Attitude to change:

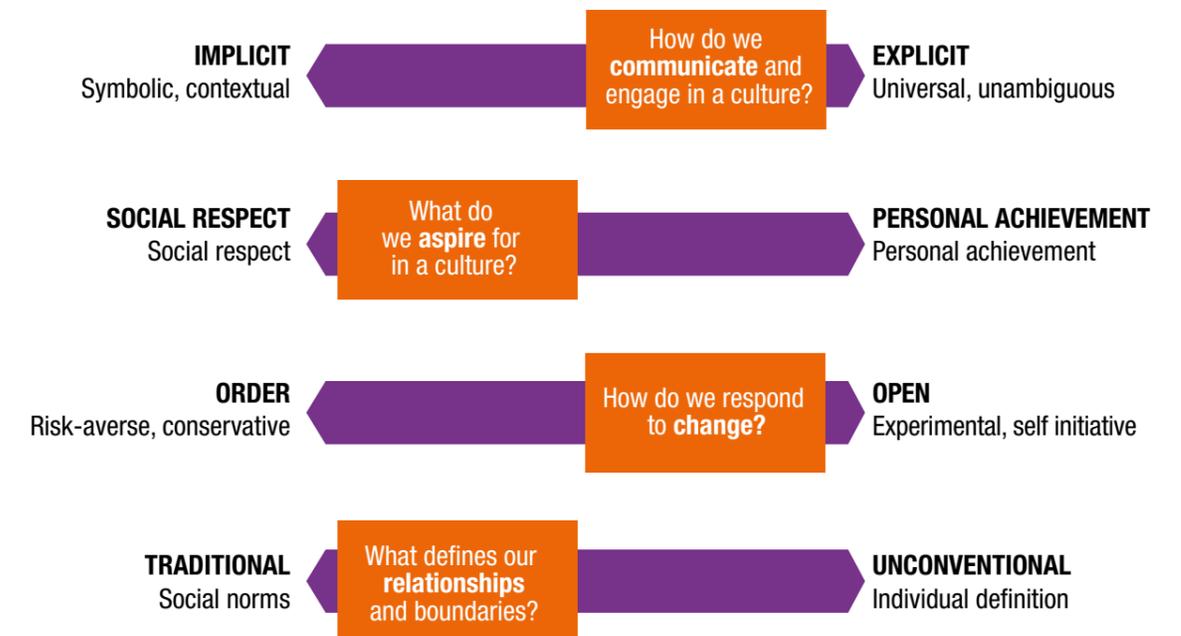
Openness to uncertainties vs risk elimination, willingness to change behaviour, motivation to adopt new behaviour, switch brands, etc. This will help to understand the specific call-to-action devices planned within communication. The spectrum here would traverse from a need for **control** (to manage change) vs being **open** to change.

4. And lastly, the roles and relationships depicted within a culture:

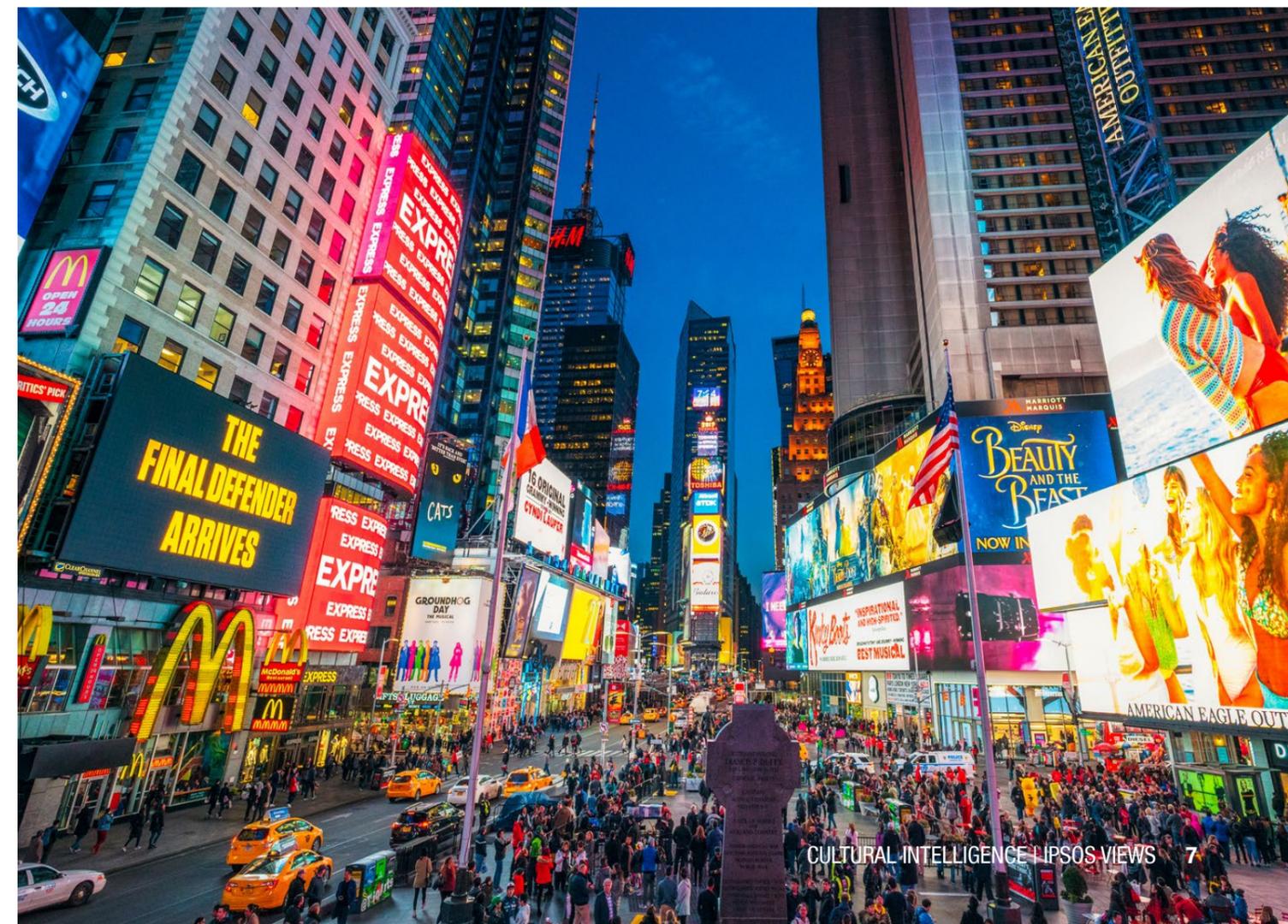
When we think about high-visibility roles such as a mother/parent, partner, authority or even advisor, understanding the boundaries, taboos and relevance hooks is critical. These roles and relationships can be defined in very **traditional** or **unconventional** ways.

The social culture context acts as a robust activation guide in terms of how global campaigns can be transferred seamlessly to local markets, and which aspects to focus on for local optimisation.

Figure 4 The four dimensions of social culture



Source: Ipsos UU



This can then be combined with further category, brand, and market understanding, in a modular scope, as required:

- **Market landscape:** category and competitive context
- **Brand image and equity:** history, activity, strengths, weaknesses
- **Advertising context:** topic, tonality, treatment

Figure 5 Combining culture with market landscape, brand image and advertising context



Source: Ipsos Creative Excellence, 1,246 ads compared





BEING WOMAN – CULTURAL TRANSFERABILITY FOR WOMEN

In parallel to our client assignment, Ipsos undertook a self-funded study to understand what it means to be a modern-day woman across diverse cultures. 'Being Woman' emphasises the importance of learning about the cultural nuances of gender and how we can support and engage women.

Ipsos curated data from a wide range of sources, including various Ipsos assets (Global Trends Report, Global Advisor studies,

country Flair reports), published research and proprietary data combined with external experts on culture, gender and markets. The insights from this study were most interesting and designed to plug into the Cultural Transferability framework.

Three vastly different cultures were selected to examine the topic of Being Woman: the US, France and China. The cultural roots shaping gender and femininity proved very different in each.

THE TENSION OF FREEDOM VS EQUALITY

Despite the great strides made in female empowerment, there remain tensions for women in many aspects of their lives. Curation revealed that underpinning the tensions was a fundamental tussle between the need for freedom vs equality.

As a lot of the empowerment narrative is centred around equality, this also meant that we were embracing empowerment standards often defined by men. Women were making progress

in terms of access to employment, education and income, but also reporting greater sense of anxiety, loss of coherence, identity and choice. Empowerment through equality added to the pressure of being a modern-day woman as, for many, the gender struggle is about freedom, not just equality. The study then led to the discovery of a female-centric view of empowerment and how we could enable women in diverse cultures towards greater progress.

APPLYING THE CULTURAL DIMENSIONS TO BEING WOMAN

What does feminism mean to women around the world today? Promoting diversity and inclusion is a key commitment for L'Oréal, with a special focus on empowering women. In partnership with our client, the global leader in beauty, we leveraged a hybrid research design that combined social intelligence with survey responses. With this, we were able to decode the true meaning that women across five cultures assign to the concept of feminism.

While we found a basis of shared association across countries, the critical cultural nuance that is required to strike the right chord was

found to be quite unique and diverse in the context of culture. When comparing our findings from Brazil and Mexico, we find surprisingly few similarities. Intersectional feminism was identified as a central theme in Brazil, while a stronger negative association to feminism was discovered in Mexico, as it is closely associated to female activism that is not yet widely accepted in all parts of the society. Whereas in Mexico, women had stronger negative associations with the concept of feminism, due to its close ties with female activism that is not yet widely accepted in all parts of the society.

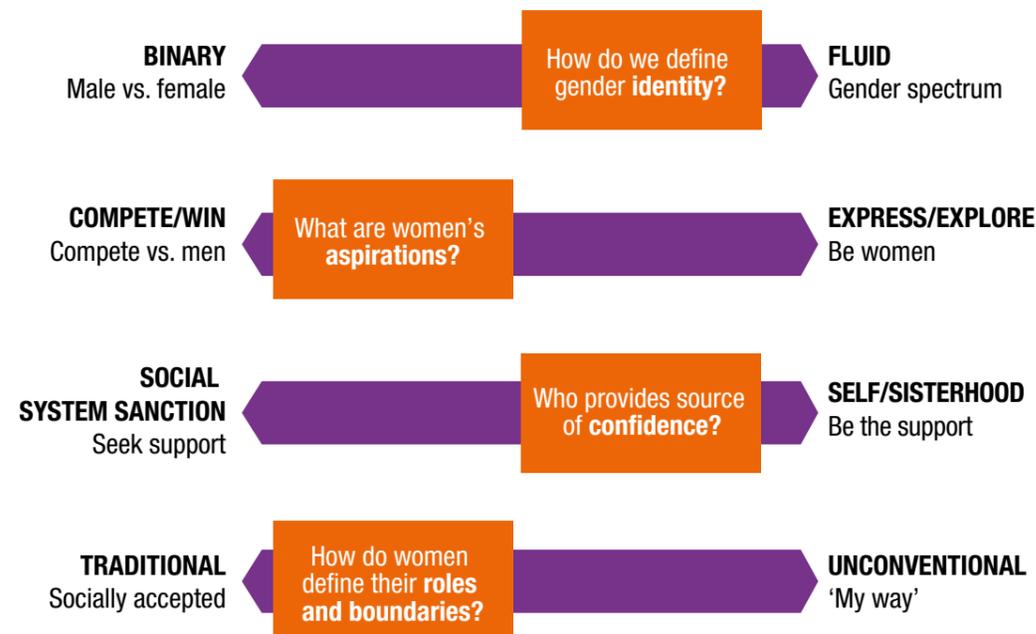
Women were making progress in terms of access to employment, education and income, but also reporting greater sense of anxiety, loss of coherence, identity and choice.”

DEFINING THE KEY ISSUES THAT DRIVE GENDER ROLES IN EACH CULTURE

As we worked through the social, historical, cultural and consumer materials to understand gender in different cultures, we discovered the factors shaping the role of gender. Gender issues were somewhat different from, but also intersecting with, the larger social culture. This led us to the development of the unique culture of gender – which would inform and guide us on the meaning and role gender takes in diverse cultures.

Gender has a unique culture in different countries, shaped by what women want, the spectrum of gender identities, and the dominant legislations and regulations. From the study, we could see that the three markets we covered (US, France, China) were contrasting in terms of how the culture of gender was shaped. This meant that even when it comes to gender, women and empowerment – the issues are not always the same in every culture. See the dimensions of Gender Culture below and how the three cultures are profiled accordingly.

Figure 6 Gender culture: understanding the WHAT

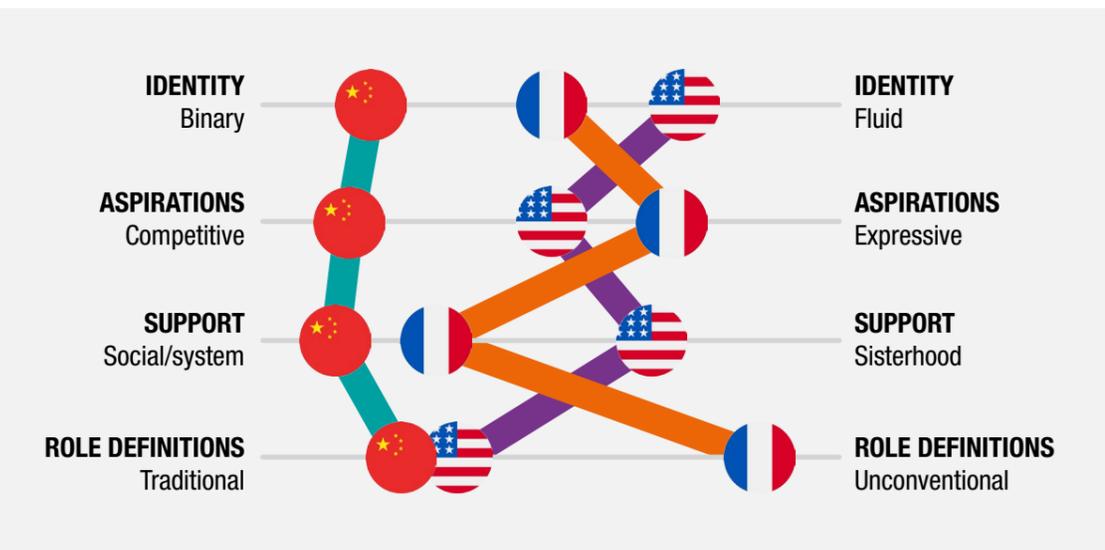


Source: Ipsos Being Woman Study



Figure 7 Gender culture: understanding the WHAT

While all countries agree on the importance of more power, equality and freedom for women, the path to gender fulfillment is different in each culture – expressed across four key dimensions



Source: Ipsos Being Woman Study

To request a presentation on the detailed findings, please contact Being.Woman@ipsos.com

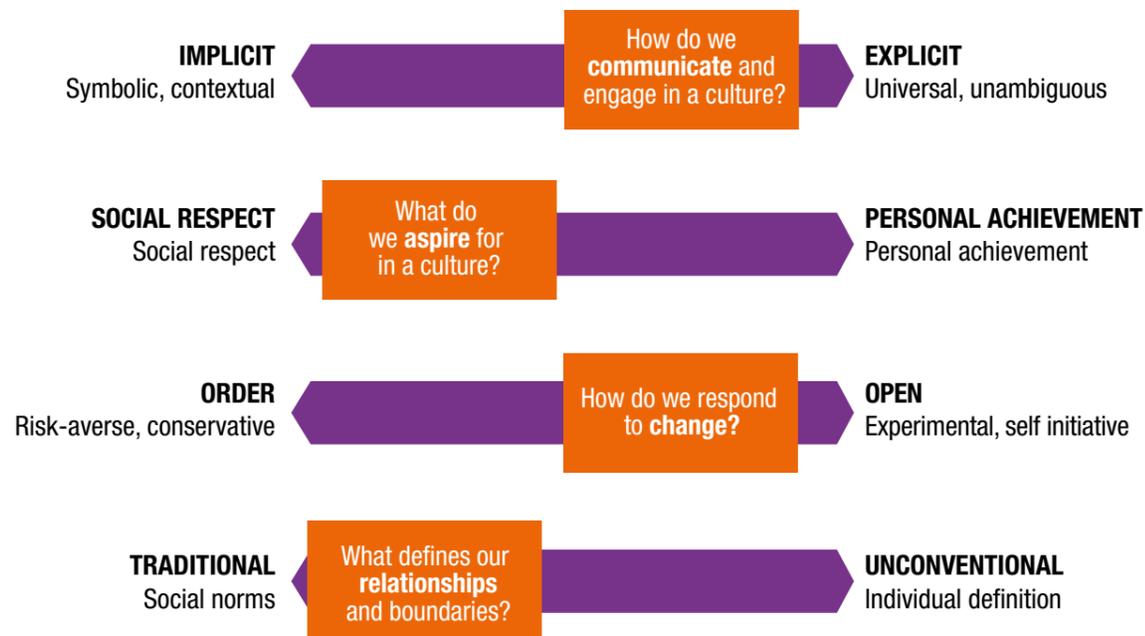
ACTIVATING THE SPECIFIC FEMININITY PROGRAMS IN EACH CULTURE

This Gender Culture intersects with the larger **Social Culture** (shaped over time by men and women) and in turn affects various empowerment initiatives. For instance, the issue of building an inclusive initiative for women may be a common theme across cultures; but this would need to be activated very differently in a highly implicit and competitive culture (like China) vs a strongly explicit and expressive culture (like the USA). For gender too, there are many cultural variations, with implications for how the divergent gender themes are best activated.

Here again, we see that the three cultures vary, with implications for disparate activation and deployment strategies.

To be truly impactful, we need to understand and align with both cultures. **Ipsos' Cultural Transferability framework** helps us profile and understand cultures – in terms of their similarities and differences.

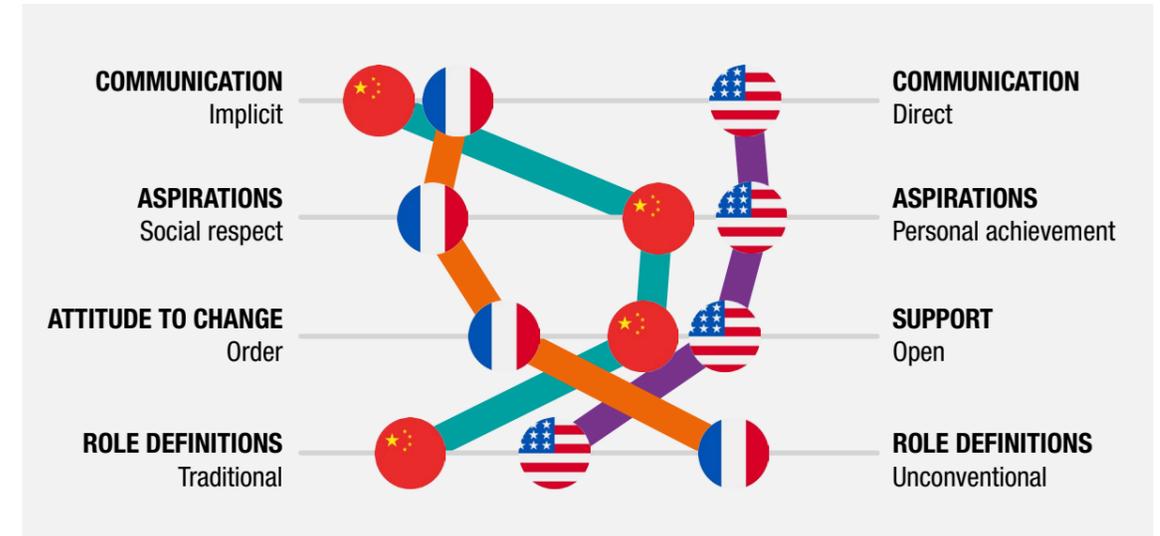
Figure 8 Social culture: understanding the HOW



Source: Ipsos Being Woman Study

Figure 9 Social culture: understanding the HOW

The activation strategies need to be differently nuanced and executed across the three very different cultures



Source: Ipsos Being Woman Study



UNDERSTANDING THE ROLE OF ADVERTISING IN BEING WOMAN

Advertising is a key influencer in shaping culture and it has played a significant role in womanhood, through portraying women vs men in its stories, historically stressing clichés and stereotypes. However, advertising can now play a positive influence on societies, as new evidence shows a positive portrayal of women makes for effective marketing.

In a 2021 research project and *Ipsos Views* paper, in partnership with ANA (Association of National Advertisers), SeeHer and the Female Quotient, our colleague Jill Urlage demonstrated that a positive portrayal of women (as defined by the GEM* measures, in the top third) can significantly impact brand growth KPIs: These ads are:

- 20% more likely to score high in Brand Choice intent
- And 35% more likely to strongly impact Brand Relationship

A positive portrayal of women also significantly influences how people evaluate and relate to advertising, yet this is clearly uneven across categories:

- Many top GEM ads are seen in Grooming and Beauty ads
- While in Home Care and Beverages, for instance, there are many fewer top achievers when it comes to portraying

women positively.

There is clearly an opportunity for these brands to move to a more positive portrayal and win in their categories.

This is also certainly reflected across the globe, with different countries and cultures starting to see their advertising moving towards positive representation of women in turn, making a difference to the success of their marketing efforts.

We see examples of a move towards positive representation in Rimmel UK, successfully moving beyond beauty stereotypes with a ‘model’ that speaks up and stands for sustainability too.

It’s also evident from Heineken in the US, whose recent ad disrupts the beer category and breaks down outdated stereotypes about men and women’s alcoholic beverage of choice. This ad addresses the societal bias that only men drink beer while women drink more “delicate” beverages. It offers the opportunity to change minds, perceptions and biases that are heavily ingrained in our social norms.

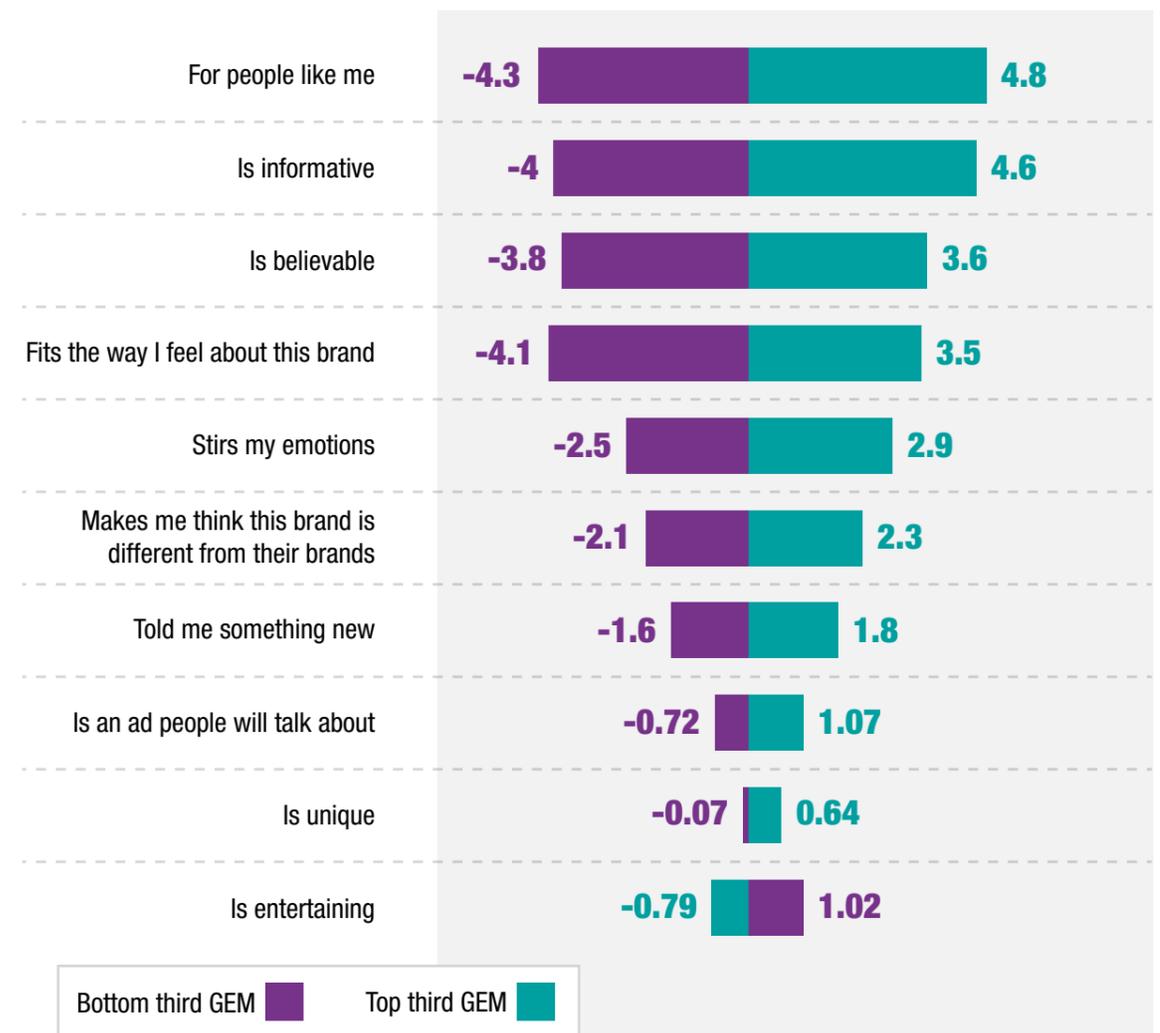
**GEM® is an open-source methodology using quantitative questions and identifies gender bias in media, developed by the Female Quotient, SeeHer and with Ipsos.*

Figure 10 Rimmel UK and Heineken “Cheers to all”



Source: <https://www.youtube.com/watch?v=uURKImOITHA> (Rimmel)
<https://www.youtube.com/watch?v=dD6r53DWxwk> (Heineken)

Figure 11 Average deviation from norm on ad ratings for top vs bottom GEM ads



Source: Ipsos study

While some countries like the US or Sweden may be ahead of the curve and have shifted a lot of their advertising towards a more positive representation of women, there is an opportunity for brave advertisers to move the cultural bias and shift society perception, as the Gender Equality Index shows below.

The initiative nicknamed “The Last Ever Issue” from Polish newspaper Gazeta and BNP Paribas is amazing. As part of defending their values around gender equality, Gazeta, BNP Paribas and Mastercard decided to change the game in Poland, which was plagued a few years ago by sexism. One symbol of that was the porn

magazine Twoj Weekend, which gave completely distorted views of women to readers. In response, Gazeta, BNP Paribas and Mastercard bought the magazine and printed “The Last Ever Issue” before closing it down for good. This issue featured Polish women role models from the world of politics, culture and sport. This became a key conversation topic in Poland and helped the society evolve.

Gazeta, BNP Paribas and Mastercard defend gender equality in Poland <https://www.youtube.com/watch?v=VBoW8JSt0-8>

Figure 12 Twoj Weekend: The Last Ever Issue



Source: <https://www.youtube.com/watch?v=VBoW8JSt0-8>



Take a look at The Gender Equality Index developed by EIGE. It is a tool to measure the progress of gender equality in the EU. It gives more visibility to areas that need improvement and ultimately supports policy makers to design more effective gender equality measures.

<https://eige.europa.eu/gender-equality-index/2021/compare-countries/index/map>

CULTURAL INTELLIGENCE IN ACTION – THE SANOFI CASE

We brought cultural intelligence to life with one of our OTC clients to help them overcome their recurring struggle to develop successful global campaigns for two of their brands.

Their key business questions were:

- How can we develop a creative campaign that will resonate in more than one country?
- Which information about the cultural and advertising specifics in each market should we be aware of to maximise our chances of success?
- If appropriate, how should we flex the campaign to better engage local audiences?
- Where should we prioritise when allocating our comms research budget across markets, to maximise the learning plan given the cultural challenges?

Ipsos developed the cultural research to brief the ad agency and guide the creative development. We also decided where the communication research should be conducted based on key market clusters. The team acknowledged the effective contribution of this work in the success of their new campaigns.

“Ipsos’ Communication & Cultural Insights have been enormously helpful. It has enabled us to better appreciate cultural differences, commonalities and nuances that have fueled the successful development of highly transferable brand communication across cultures. We can also apply more efficient creative testing and validation with higher confidence in attaining great results for in-market success”
 - Ian Kirumba, Global Lead Category Consumer Experience Insights, Sanofi Consumer Healthcare



CONCLUSION – THE EMPATHY PASSPORT

Making brands and creativity travel is complex because culture takes many forms, touches many dimensions, and cannot be modelled. This applies to advertising and creativity, to brand building and to many other human activities. We can rely on data, algorithms and machines to evidence the difference between one country or another. In our experience, data and AI are useful tools, but they are not enough. What you need is understanding and empathy, a balance of art and science, of curation and ethnography, if you genuinely want to give brands and ads a passport to work across the world.

Here are three important dimensions where cultural intelligence and human intelligence augmented by data, really matters:

01. Understanding the brand and its context – how people engage with the category in different countries, what their different motivations are, how the brand history and position differ.

02. Understanding advertising – how people relate to advertising across borders, what matters most for the brand category, functional and emotional benefits, tone, and mood territories.

03. Understanding culture – what values and beliefs shape each country, what aspirations, tensions and expectations people have.

Doing this type of exploration prior to developing your brand and comms strategy is essential for understanding how the same message and idea should be deployed locally in a meaningful way while resonating at a global scale. Cultural intelligence can be the blueprint to inspire your brand development, its innovation agenda, and a wonderful source of inspiration for your agency to minimise risk while leveraging creativity potential, and making more relevant, empathetic, effective advertising.

Some research agencies have favoured AI prediction engines to guide transferability. We strongly diverge with our colleagues there. Humanity, in all its complexity cannot be factored with machine learning alone. In her 2018 publication 'Human Curation in an AI World', our co-writer Radhecka Roy highlights that mixing human and artificial intelligence is our best chance of success: "We (human curation) start where machines stop by bringing in the deep human connection to data". Data is important, but as a Google executive said "I have big data. What I need to understand is the people behind the data."

For culture and creativity to travel, you should trust in augmented (combined human and machine) intelligence.

For culture and creativity to travel, you should trust in augmented (combined human and machine) intelligence. ”



HOW TO MAKE BRANDS AND ADS CULTURALLY RELEVANT: IPSOS' HITCHHIKER'S GUIDE TO CULTURAL TRAVEL

Having witnessed the challenge of transferring brands and campaigns across borders, Ipsos has developed a unique method to help brand and advertising transferability. This method answers some of the following important business questions:

Agency briefing: The brand is preparing a campaign for 10 countries. How should local nuances be considered in the communication strategy?

Priority markets for a test: The brand has a new campaign creative idea in development across 10 countries. Which three countries would be best to do a test to cover main patterns?

Ad transferability risk: The brand has an ad that was released in Germany. How risky would it be to use it in Spain and Italy?

Ipsos' approach to cultural intelligence is mixing human and artificial intelligence and using three different lenses of understanding:

THE EXPERTS' LENS

Ipsos can cover 88 countries with both cultural experts and communication experts.

Cultural experts come from our qualitative community. With 1,200 qualitative researchers in the world, Ipsos is the biggest qualitative community in the market. These researchers are natural cultural observers as they spend a huge part of their time interviewing people, visiting their homes and observing behaviours. Moreover, in each local team we have identified special researchers with specific academic backgrounds like ethnography, sociology and semiotics, allowing them to become real cultural experts.

Our communication experts come from Ipsos' Creative Excellence teams: an Ipsos division dedicated to communication evaluation. The team has hundreds of researchers working with hundreds of clients and every year assesses hundreds of campaigns.

THE ADVERTISING RESEARCH DATA MINING LENS TO UNDERSTAND DRIVERS AND LEARNING

We use quantitative data coming from our global ad assessment database and we mine it using a combination of machine and human intelligence. We start by exploring our countries database to look at relevant cases of ads tested across different markets. We use algorithms to understand proximity and distance between countries looking at the different ads performances. We also explore "the why" quantitatively – we see what variables, meta tags (for example ad length, brand presence), measured ad diagnostics (e.g. entertainment value, distinctiveness, informativeness) explain the difference in performance. We then ask our local and global advertising research experts to illustrate the identified differences using real ad examples and build a set of lessons for marketers and ad agencies to use in their next campaign development.

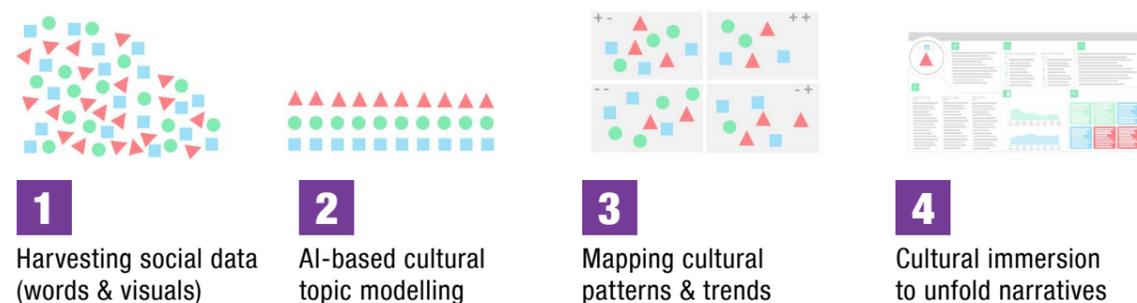
THE SOCIAL CULTURAL INTELLIGENCE LENS - TO A DEEPER LAYER IN CONTEXTUAL DEPTH

In today's hyper-connected world, consumer culture travels at tremendous speeds as people communicate with each other like never before in human history. As a result, culture and the meanings that people assign to the world around them is in a constant state of flux. To unpack culture, we therefore need to go where culture incubates, changes context and amplifies.

With algorithms and massive consumer data at our fingertips we now have the ability to map and compare local cultures in real-time to inform and inspire creative development that is in tune with the nuances of consumer culture. But how can we transform big consumer data into cultural insights?

Gathering the relevant textual and visual social data marks the starting point of the process. Semantic AI, in the form of unsupervised machine learning models, then help us in step two to model and cluster the topics, cultural concepts or trends within our social data corpus. Next, we map the cultural landscape by analysing the contextual surrounding for each of the discovered topics and how they are interconnected. This enables us to compare cultures from two or more countries by exploring similarities and differences as well as cultural shifts and trends from the historic evolution of topics. Once identified, we must now make sense of the discovered topic cluster and identify the meaning behind. At this last stage we bring in our cultural analysts and semioticians to unearth the critical subtext from consumer narratives directly. This is how our approach combines the advantages of machine and human intelligence in a seamless flow.

Figure 13 The Ipsos approach



Source: Ipsos Social Intelligence & Analytics

CULTURAL INTELLIGENCE

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AUTHORS

Arnaud Debia - Global Creative Development Director, Creative Excellence, Ipsos

Carine Baladda-Brenas - Global Program Lead, Creative Excellence-Brand Health Tracking, Ipsos

Louis Rougier - Chief Research Officer, UU, Ipsos

Sandro Kaulartz - Chief Research Officer, Social Intelligence Analytics, Ipsos

Radhecka Roy - Global Service Leader, Strategic Curation, UU, Ipsos

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