



Ipsos MORI

# THE POWER OF CULTURE

THE  
FUTURE **2018**  
OF RESEARCH  
SERIES



# THE POWER OF CULTURE

People love culture. Watching the latest and greatest films, reading the current Booker prize winner, or going to an inspiring art gallery are all activities which contribute to our aspirations of becoming a 'culture vulture'. Culture is a manifestation of human intellectual achievement that provides a commentary on society – people want to watch, read and explore it, and it's become an activity in its own right.

Finding out what makes France French, Spain Spanish or Denmark Danish is why we travel. Whether it's partaking in the café culture of Paris, eating late at night in Madrid, or celebrating hygge in Copenhagen, we have an innate desire to occasionally dress ourselves in different cultural fabrics from our own. Even within countries and cities we are navigating complex cultural nuances. London public transport rules are pretty well documented; no talking to strangers, eye contact or general happiness. In the north however, you see chatting, laughter and a much more relaxed atmosphere on any public journey. Culture is almost impossible to avoid, which demonstrates the strength of the role it plays in our lives, wherever we may be.

But often, when market researchers go to work they switch off culture. We begin market briefings with penetration statistics, household expenditure and demographics, but we rarely attempt to immerse our clients in the culture their product, services or policies exist within. Variances in survey results are described as 'market differences', immediately diluting the distinctions, which are in fact the result of a complex web of cultural influences.

Market researchers are careful about only 'measuring' things they have a clear definition for, and, in doing so, they remove extraneous factors. But our lack of a definition means that the industry ignores culture and the challenges

and opportunities it presents us with - but that is not a solution. Instead, we propose a simple definition that market researchers can use to bring culture into the mainstream:

Culture is shared meanings and learned behaviours. It shapes how we experience the world around us. It is how we belong.

Culture must be part of our briefings, and play a central role in our research. Our shared human behaviours and collective recognition of brands and symbols have all been created through complex cultural constructs that guide our thinking. We can only hope that by creating a usable definition of culture for the market research industry, it allows us to observe and comment on culture in the same way that we do when we visit an art gallery, watch a theatre production, or travel abroad on holiday.

This paper will share three case studies, which illustrate the way in which culture affects our social norms and the underlying tensions it can create, whether that be for brands, business, politics or society. If we don't focus in on culture, how can we expect our communications to be effective, our brands to have salience, or our policies to be attuned to people's true beliefs and behaviours?

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**Claire Emes**  
Managing Director  
of Qualitative,  
Ipsos MORI

**Hanna Chalmers**  
Senior Director,  
Ipsos MORI

# GENDER NEUTRALITY IS GOOD FOR BUSINESS

Although research has shown similar content preferences for both male and female subscribers, The Economist's subscriber list remained heavily skewed towards men. There was an opportunity for the magazine to appeal to a broader audience. The objective was not to transform The Economist into something completely new as this had the potential to alienate existing subscribers. It was about a more nuanced and subtle pivot to better appeal to women.

Ipsos MORI took The Economist through an exciting integrated research journey using semiotic analysis, focus groups, and readership surveys across the globe capturing responses amongst current, lapsed, and prospective readers of both genders. An integrated approach allowed for deep insights, to create a comprehensive strategy for reaching more female readers.

We started the journey with a semiotic approach to analyse communication style, as well as marketing techniques. The research found The Economist to be speaking to readers in a singular, didactic, and authoritarian voice, which was compounded by the visual look and feel of the magazine. The magazine was using an institutional style that was masculine in nature and characterised by muted colours, sharp edges, a de-emphasis on captivating imagery, and a strict uniformity throughout.

The qualitative and quantitative approaches which followed the semiotics added layers onto our initial findings. We did not see major differences between men and women's consumption habits, content preferences, and most brand perceptions. As a result, we realised that to attract more women, the content needed to be communicated more clearly, the benefits emphasised more, and the tone of the marketing slightly softened to be more inclusive.

The Economist has fully embedded these insights within

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## Marina Haydn

Managing Director, Global Circulation,  
The Economist

both its marketing and commercial teams to create lasting change within the organisation. Marketing communications have now shifted the tone of voice, language, and brand personality to appeal more to female readers. Editorial staff have a usable 'tone checklist' to use when designing communication strategy. Marketing also emphasises issues we know women are interested in.

We also recommended some stylistic changes. Our semioticians worked alongside The Economist's design team to provide on-going tactical advice on the visual design of the newspaper to make it less institutional and more accessible.

This initiative is backed by ambitious, but achievable growth targets and the tweaks suggested are beginning to bear fruit in better female reader engagement. Month-on-month, female subscribers grew by 0.6% over the previous month versus male subscribers which grew at a much slower pace of 0.3% during the same period.



**We used semiotics for the first time to better understand how our brand identity is perceived through our marketing communications and product design. The output was very clear and actionable, and provided a framework for deeper evaluation in the qualitative research. Semiotics has given us invaluable external feedback on our current visual communication, and we are working with Ipsos recommendations in upcoming design iterations.**

Marina Haydn - Managing Director, Global Circulation





# THE CULTURAL IMPACT OF PUBLIC HEALTH MARKETING

Public Health England (PHE) exists to communicate, persuade and effect change, as do commercial organisations. However, this is where the similarity stops. PHE is distinct, not only because it publishes its marketing strategy, but because culture is front and centre of everything PHE looks to achieve and its target is largely the less well-off and less educated. Whilst cultural change feels like something that happens organically in life, at PHE the language is all about cultural impact and the intent to make change happen.

In the private sector, it is important to understand culture to align innovation, communication and strategies to be relevant and sticky to target consumers. However, for PHE it is about understanding culture and how to nudge behaviour to drive new and more positive cultural norms. Programs and initiatives are built to create an environment that is conducive to change, helping to drive healthy behaviours and shift cultural norms. These issues though, such as promoting healthy eating in children, are particularly challenging.

**Tone in the translation of the message and relevance to the audience are the magic ingredients in driving behaviour change.** Matthew Walmsley, Deputy Director, Strategy and Behaviour Change

The potential power of shifting culture is evident when we consider Tobacco, for example. If we look back to the 1960s it was perceived that blowing smoke into the face of the opposite sex was alluring. Fast forward to 2018 and things could not be more different. This cultural shift has obviously been driven largely by the realisation and publicising of the health issues associated with the habit.

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**Matthew Walmsley**  
Deputy Director,  
Strategy and Behaviour Change

Since the introduction of the smoking ban in public places [a little over a decade ago] we have seen an acceleration of this cultural shift. When the ban was first proposed it was considered by many to be an affront on peoples' freedom and somewhat 'Nanny state'. However, now that public places are free of smoking it is seen more as a victory for people's freedom and a right not to be surrounded by smoke.

Direct parallels can be drawn between the risks of smoking and the rising obesity crisis and our over-consumption of sugar. PHE's 'Change 4 Life' campaign, and the research that underpins it, is also reaping health benefits with initiatives driving positive shifts in behaviour and mindset to create a new healthier cultural norm. As consumers, we want to eat sugar as and when we desire it and PHE wants to move the debate away from the joy that consumption moments bring and the confusion over making more healthy choices and instead focussing on how to limit exposure and shift perceptions which are realistic and achievable for the long term.

Ethnographic and cultural analysis has highlighted four important insights and how strategies have been developed by PHE to work with the consumer to make positive behaviour change.



# Insights underpin our approach

## Audience insight

Nutrition is confusing and even seemingly healthy food can be bad

Healthy is tasteless/expensive, and out of reach. It can also cause arguments

Parents don't recognise their kids as fat (big build, muscly, puppy fat)

**Food is love. Parents love their kids and food is love**

## Approach

Simplify the problem and talk about hidden sugars and simple swaps

Provide realistic swaps and create tools that can engage kids in the issue and the solution

Reframe by talking about 'fat on the inside'

**Avoid sacred family moments and 'snuggle time'. The focus in these moments is not about being healthy**

## Solution



Through campaigns and initiatives, PHE is teaching parents and children about new behaviours which will ultimately change the culture of consumption.

In the three years that PHE has been running its Change 4 Life campaign, sugar consumption amongst children has reduced by a third. When PHE release their new campaign, they will be communicating that children are having twice as much sugar as they should rather than three times as much which was the message only three years ago. Reported behaviour change, experience in retail and academic research looking at consumption would indicate that the cultural shift is gaining momentum.

PHE is not looking to lecture or criticise but rather use cultural insight to support parents in making better choices for the parents of the future.



# USING CULTURAL INTELLIGENCE TO HELP PETS



Mars Petcare was faced with the challenge of driving growth by getting pet owners in developing markets to change behaviour and feed their pets manufactured pet food instead of human food. Traditional messaging about how pet food is nutritionally better for pets had fallen on deaf ears, and Mars Petcare needed to research the cultural and emotional levers to drive a behaviour change campaign.

Through conducting ethnography with families in Brazil, we found that pet owners regularly cook two full meals a day... just for their dog! The ethnographic research captured compelling footage to reveal the love that was transmitted from pet owners to their dogs, and the accompanying mobile diaries enabled the participants to keep simple, easy-to-complete food diaries, so we could categorise all the Brazilian culinary variations that were fed to their pets.

Recognising the love and reciprocity imbued with cooking two full meals a day for their dog, Mars realised they couldn't get consumers to switch to a pure pet food meal which did not require the same level of preparation. Instead, the strategy had to be to get more pet food calories into each meal, by getting owners to combine pet food as part of their daily recipes. Mars could then gradually aim to build up the proportion of pet food into their diet over time, increasing convenience for the owner and the health benefits for the pet.

Getting people to like a product is one thing, disrupting people's behaviour to start buying a new product is a much bigger challenge. The ethnographic research looked at where and how people did their shopping in an unobtrusive way. In watching people shop, we noticed the level of time and attention they spent choosing vegetables in the supermarket, partly due to their love of fresh produce.

**Oliver Sweet**  
Head of Ethnography,  
Ipsos MORI

**Sebastien Lion**  
Vice President, CMI,  
Mars Petcare

This was a strategy that used the definition of culture to understand consumer behaviour:

- That the shared meanings of a good and healthy meal required fresh meat and produce, and this had to be harnessed not challenged,
- And that consumers had learned these behaviours over time, and weren't about to change them.

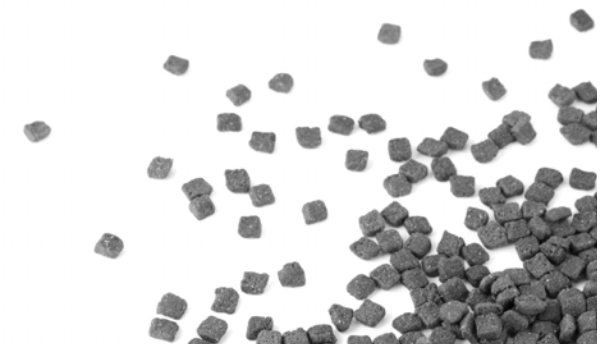
## A Cultural Intervention that had massive business impact

Incorporating these culturally informed strategies saw sales data over a three-month period increase by a staggering 34% against the control stores. When rolled out across Brazil, Mars predicted this would lead to a rise in sales of circa 10 million US dollars in year one alone. Initial control trials suggest this simple intervention would completely exceed all ambitions for Brazil.

**Today, most of the marketers are focused on the Internet of everything. But it has proven critical to reconnect with real pets, real pet owners, real food and real love. Ultimately we will evolve behaviours only if we understand the meaning of inherited habits.**

Sebastien Lion, Vice President CMI, Mars Petcare

The way in which a small, behavioural intervention can have such a large success is testament to the importance of examining everyday cultural practices as part of a marketing campaign.





SO...

... culture is everywhere, it guides our behaviours, values and perceptions. It shapes how we dress, how we vote, where we live, whether we queue or not and what we watch. These shared meanings and learned behaviours shape how we experience the world around us. The three case studies shared in this paper illustrate the importance of building greater cultural intelligence and the power it has, whether you are looking to enter new markets, develop new product offerings, drive inclusivity or seeking to improve the health of the nation.

Practical solutions to building cultural understanding are complex, and need to be carefully considered. However, once harnessed, cultural intelligence provides a strategic approach for examining change and difference. If we take the time to invest in and understand culture, and view our challenges through a cultural lens, we will create more relevance and ultimately more impactful innovation, communications and policy. This is the power of culture.

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# Ipsos MORI

## ABOUT IPSOS MORI

Ipsos, one of the world's largest and most innovative research agencies, works for a wide range of global businesses and many government departments and public bodies.

We specialise in solving a range of challenges for our clients, whether related to business, consumers, brands or society. Our areas of expertise range from brand, communication, media, innovation and healthcare research through to customer experience, corporate reputation and social and political research.

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that make our complex world easier and faster to navigate and inspire our clients to make smarter decisions.

