



Glocal Evaluation:

Measuring Effectiveness, *By Nigel Hollis, Chief Global Analyst, Millward Brown*

Global campaign effectiveness needs to be measured locally, from the ground up, not the top down.

When you can connect with friends all over the world on Facebook, and familiar brands greet you in malls across the globe, it is tempting to think that the time is right for truly global campaigns—ones originated and implemented in the same way everywhere. But the superficial evidence belies significant differences across markets. So unless your brand is one of the few that targets a homogenous global audience, you must plan from the ground up and your measurement should reflect that local mindset. The think global, act local mantra applies to all aspects of the planning process, from identifying a common global platform on which to build

a campaign to assessing its in-market effectiveness.

Global Brands, Local Consumers

Today many brands aspire to implement consistent, global communications platforms that drive sales, boost brand strength and have a real impact on the bottom line. Expecting the same efficiencies that are realized in manufacturing, operations and supply chain standardization, companies hope to use the same advertising strategy and executions around the world. But all too often the results are disappointing. A campaign that had great promise in one

region fails to move the needle in others. Take the example of a recent ad tested for a global financial services company. The ad performed well in Europe but failed to engage the audience in Brazil, where a more creative and enjoyable approach is expected even for financial service ads. More typical of the Brazilian scene would be the ad created by agency Africa for the Brazilian bank Itaú. The ad features guys kicking footballs at dozens of drums in order to play the Itaú theme tune in honor of the bank's sponsorship of carnival in the city of Salvador.

Glocal Evaluation: Measuring Effectiveness



“A big idea fails if it is incomprehensible when viewed through a different cultural lens”

The problem is that while many companies operate on a global basis and have become accustomed, if not comfortable, with working across countries and cultures, most consumers live very local lives. They shop locally, drop their kids off at the local school and hang out with friends at the local bar. More importantly, they watch local TV stations, read local newspapers, and increasingly surf local digital content. It is not just a matter of which media channels to use. Media consumption differs by country even within channel. In London, most people commute by bus or tube so smaller posters predominate. But in L.A., where commuters

spend hours on clogged highways, bigger billboards are the norm. And in Sao Paulo, outdoor advertising is banned, forcing marketers to seek alternative ways to reach their audience.

Media buying is forced to reflect the diversity of local markets. Even if we wanted to reach a pan-European audience, the resulting plan would be a patchwork of different channels and properties. There are very few media properties with even regional reach. And, in spite of many advertisers desire to use the same executions across countries, ad effectiveness reflects the same diversity. Our research suggests very few creative executions have the ability to effectively transcend differences in brand status and cultural boundaries no matter how much advertisers might wish otherwise. If the role of planning is to bring the consumer into the process of developing advertising (both content and media) then it needs to start with

the local markets and work up, combining knowledge of the target consumer within category insights, competitive reviews, and cultural understanding to synthesize an effective campaign that will work across countries and cultures.

Measure from the Beginning of the Development Process

If global planning starts from the ground up, so too must our measurement of its effectiveness. And that means starting at the beginning of the development process not just when a campaign runs. Unless the strategy and creative idea are relevant and resonate with the intended audience the finished campaign is unlikely to prove effective.

Increasingly, advertisers are seeking to identify a communications platform that will inform all creative executions irrespective of media channel or country. But identifying a big idea is a big task even before you contemplate the complexity offered by different countries and cultures. Dove's Campaign for Real Beauty resonated well in Anglo-centric cultures but failed when it came to Asian cultures where concepts of beauty are still defined by outward appearance. A big idea fails if it is incomprehensible when viewed through a different cultural lens. Research of all types – qual and quant, observational and interactive – can all help inform whether or not an idea is likely to work across cultures.

Glocal Evaluation: Measuring Effectiveness

“Consistent measurement of brand equity and positioning across countries helps ensure that copy is deployed only in countries where the brand’s standing is likely to encourage success”

In order to develop a global positioning for its Powerade brand. The Coca-Cola Company adopted a two-stage approach. In the first stage, respondents used an online forum to discuss their sports participation and give their reactions to different Powerade

positioning concepts and the extent to which these resonated with their own experience. Insights from this research were then used to refine five concepts for the next stage of quantitative research. Importantly, the first stage helped shift the focus of the campaign away from “winning” to a globally resonant theme of “performing at your best.” Not only did the research inform the global decision, market-level data provided the individual markets with information on how best to implement the campaign in the way that best fit the local culture and competitive context.

Measure Likely Effectiveness with the Local Audience

Even when you have identified an idea that resonates consistently around the world, the next challenge is to execute against that idea. This is where the ongoing challenge lies. Johnnie Walker may espouse

a consistent global idea of progress but executions are developed appropriate to the local culture. If they did not do this, the global campaign would not be as effective. A recent ad developed for Brazil shows the mountains of Rio de Janeiro transforming themselves into a giant that strides across the ocean. The slogan is: The Giant is No Longer Asleep. Brazil, Keep Walking. The ad captures the pride Brazilians feel that their country is playing a new and more powerful role in the world.

But not every brand has the luxury of developing local content and even the largest global brands will seek to redeploy ads for markets with a lower-volume potential. In cases like these, the brand must identify the execution most likely to transfer from one country and decide whether or not adaptation is necessary. Measurement can play a key role in informing decisions related to ad transference. Two main hurdles must be overcome in order for an execution to prove effective across countries and cultures. The first is brand status. All too often an execution works in one country because it fits the local knowledge of the brand and its competitive standing. But transfer that ad to another country and the context may undermine both comprehension and effectiveness. Consistent measurement of brand equity and positioning across countries helps ensure that copy is deployed only in countries where the brand’s standing is likely to encourage success.



Johnnie Walker (above): ‘The Giant is No Longer Asleep’ aims to capture the pride Brazilians feel in their country’s more powerful global role

Glocal Evaluation: Measuring Effectiveness

The second hurdle to be overcome is differences in culture. We have all heard the stories about ads that fail because of inappropriate translation, but far more frequent is failure due to incomprehension. For instance, many ads seek to create enjoyment through the use of humor. But what is found to be funny in one country may simply be thought childish, banal or even offensive in another. And often it is the subtle things that have the most influence: values, customs or lifestyle. Unsuccessful transfer of an ad from one country to another may be determined by something as simple as an idiom that is understood in one country and not the other. The only solution to this challenge, other than originating ads locally, is to pre-test ads to see whether they will be well received by the intended audience, and what adaptation might be required.

Measure In-Market Effectiveness

Turning now to assessing the in-market effectiveness of a global campaign we are once again steered back to the local level, where the necessary media and sales data are measured. For this reason brand and ad tracking, Crossmedia effectiveness research and econometric modeling are all conducted on a local market basis. You might expect social media listening to be the exception to this rule but in reality measuring a global picture proves messy, because platforms and measurement services are regionally fragmented. And, if you care enough about a market to advertise in it, wouldn't you like



to know how the campaign is received by all your target audience, not just the vocal minority?

“In a growing number of countries, there is increasing value in planning audio visual ad exposure across TV and other media”

The market-level approach allows us to understand the effectiveness of media selection and copy within a country but what about the global picture? The same campaign may stimulate a very different response across markets depending on consumer attitudes to advertising, media clutter, category growth rates and brand sales elasticity.

To look at a global picture we must first compare performance with country databases and then look at normalized results to draw conclusions about campaign effectiveness. Unfortunately, this approach may seem unnecessarily complex to the end-user but it is absolutely critical if sensible comparisons are to be made between countries. For instance, on average, Scandinavians tend to be more negative in their response to advertising than Poles or Mexicans, while Indians and Indonesians tend to be far more positive. This in part reflects cultural differences but also attitudes to advertising in general. This type of difference is not just apparent in attitudinal data. The sales elasticity to advertising will differ within product category depending on the relative wealth of the population and the economic growth rate.

Glocal Evaluation: Measuring Effectiveness

This said, consistent patterns do emerge from the data, particularly with regard to crossmedia effectiveness. Time and again — in many different countries — we see a key role of TV in “priming” mass audiences. This significantly increases response to further communications exposure in another medium. So in that sense, we have a global “rule.” However the clutter levels by country differ greatly, consequently changing the planned frequency needed to “cut through”, and the volume of GRPs one can put behind an ad before reaching diminishing returns. This is not just about the size of the media budget and media owner deals; large sums of production money are bet, very early, on the number of ads to produce, their length, their rotation all based on anticipating frequency and diminishing returns once deployed on TV.

In a growing number of countries there is increasing value in planning audio visual advertising exposure across TV and other media like online, on mobile, on tablet and even on the digital posters that abound in tier 1 cities in China. We see that digital audio visual usefully adds frequency and some additional reach among lighter TV viewers. However the returns and consequent investment levels must take into account quite different local audience penetration, and a variety of online media environments—sometimes less cluttered than TV—sometimes much more. Such things change rapidly and a local eye is needed to ensure returns are maximized.

Conclusion

In these days of doing more with less, the message that effective measurement needs to be conducted from the ground up is unlikely to prove popular, but neither does it make it untrue. If you really want to understand how people respond to your campaign ideas, executions and in-market deployment you have to do so at the local-market level. The world is still an incredibly diverse and complex place and if you ignore that granularity it simply opens up opportunities for competitors to take advantage of your blind spots. Global brands are increasingly being challenged in countries like China, India and Brazil by nimbler and more culturally appropriate local brands. Their proximity to their customer gives them important advantages, not least an innate understanding of their culture and the local media and shopping environment. If marketing communication is the equivalent of a brand’s conversation with the world, global brands must be well-informed and tapped into local culture if they are to remain successful, and that means measuring effectiveness from beginning to end and from the ground up.

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