

## Far away? Global Media Perception and Consumer Style

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In times of globalization, national markets become too small for many companies. Web communication overcomes barriers and restrictions of politics, trade and culture. Especially for mail order business, the potential for sales is boundless.

### Direct Marketing Monitor International

For six years, DHL Global Mail has been conducting consumer surveys on a multinational level: Covering the most relevant regions of the world and a total of 30 countries, the annual publication Direct Marketing Monitor International focuses on understanding the acceptance of direct marketing, especially direct mails, and other advertising media channels. All surveys are conducted in a team consisting of MRSC (Deutsche Post DHL), responsible for the concept of the Direct Marketing Monitor International approach, <sup>(t)</sup>evolution for data analysis and reporting and TNS infratest for fieldwork.

The study strives for supporting sales activities and is used in direct sales contacts in many regions of the world to understand consumer styles, target groups and basic attitudes towards advertising media. The monitor structure is divided by coun-

try and region and gives a country overview consisting of:

- Socio-demographic structure,
- Reception of and response to direct mail,
- Usage of response channels,
- Relevance of design and content of mailings,
- Advertising media affinity,
- Consumer's interests and product affinity, and
- General buying attitude and consumer styles.

### Global Predictors of Advertising Acceptance

Looking at the impressive data base across 30 countries, the amount of currently unexplored findings and regional comparisons is tremendously high. Based on a meta-analysis approach we re-analyzed the given data to answer the following questions:

- Is there a global marketing target group out there?
- Is it possible to explain global advertising media acceptance by socio-demographics and consumer styles?
- How can the ideal global marketing target group be characterized?

- Which regional specifics have to be considered?
- Is there a specific target group for different advertising media channels?

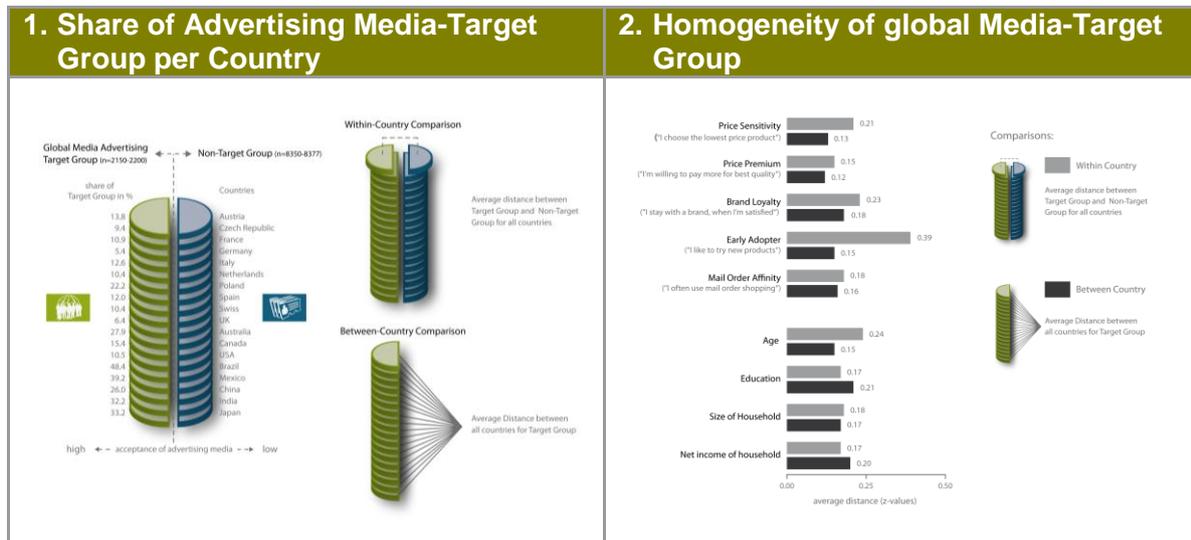
### How to define the global Marketing-Target Group

Based on comparability of data structure, we run the meta analysis with N=10,569 cases in 18 countries: Australia, Austria, Brazil, Canada, China, Czech Republic, France, Germany, India, Italy, Japan, Mexico, Netherlands, Poland, Spain, Switzerland, UK and USA. For all these countries, we used a simple logic to define the advertising media-target-group, which shows high acceptance of advertising media including print ad, television, white mail, email, internet, and radio. On a one to six point scale from media refusal to full acceptance, the ideal media-target-group is defined by the minimum average of four across all media ratings. All ratings below four indicate low advertising media acceptance and are the non-target group. As shown in figure 1, the share of our ideal

media-target-group differs from 5 to 20 percent in Western Europe, up to 30 to 40 percent in countries like Mexico, India, or Japan. The share per country may vary due to differences in maturity of markets (US, UK, France etc. as mature markets have the lowest shares of advertising media-target-group whilst emerging markets like China or Brazil show tremendously high shares) or due to cultural differences in acquiescence as known e.g. for South America. Nevertheless, the defined group per country has to be closer examined following two analysis steps.

### There is a global Marketing-Target Group out there

The main question leading this section is driven by the following assumption: If there is a group per country that shows high advertising media acceptance, this group is assumed to be homogenous on a global level and closer to that specific group in other countries than to their fellow countrymen.



To verify the thesis, our approach is the following: Main aspects of consumer styles (like price orientation, brand relevance etc.) and socio-demographics (age, gender, etc.) are normalized per country and put into an easy-to-use index as a difference within groups vs. between groups. *Within-country* is a mean difference of each target group per country compared to the respective non-target group. Between countries is a global average of all distances between each target group per country.

Based on this highly aggregated analysis, results reveal the global-target group is more homogeneous (lower mean differences between country) across the globe and each group is specific in each country (higher mean differences within country) (see figure 2). The average distances between the high media acceptance group and the non-target group is for the majority of indicators higher than distances between countries for the target group. In terms of analysis of variance, the data shows a highly significant main effect for the factor global advertising media-target group and no effect for the factor country. Obviously, this advertising media-target group has a distinct global profile in terms of consumer styles and some demographic attributes except income and educational level, which will be discussed.

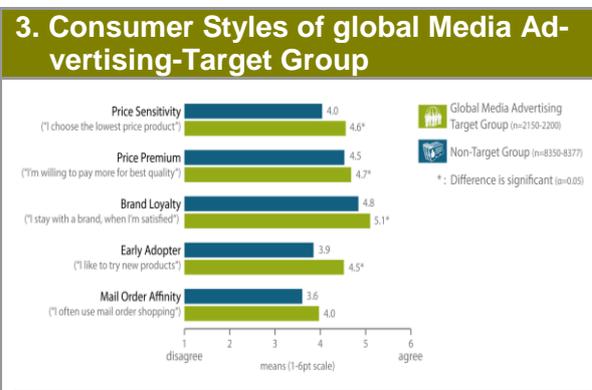
### Characterization of the ideal global Marketing-Target Group

The higher homogeneity of the global target group is the first step of the analysis to prove the hypothesis that this group exists on global level – now we explain how this target group can be characterized. Except net income and education, all indicators for the global media-target group reveal a specific and very interesting consumer profile: The cross-cultural-target group shows higher brand loyalty and price sensitivity, is additionally very open for innovations / new products and values quality – a profile which can be described as open and reflected consumers. They can be characterized as younger (37 years on average, compared to 44 years for the

others – a highly significant result), more likely women (58 percent compared to 53 percent in non-target group) and family-oriented (again, highly significant: 3.5 people per household compared to 3.0 for others) and have a substantial affinity for distance selling (see figure 3).

The cross-cultural perspective of defining the global advertising-target group also demonstrates high conceptual consistency for detailed preferences and interests regarding typical consumer products. Due to the slightly female predominance in this target group, fashion (including shoes) shows the largest gap to the non-affine-target group, followed by mobile communication. Highest interest scores are given for healthy living or wellness and media (DVD, books and music). Moreover, it is important to mention that, again, all results for product interests are globally more consistent within the advertising media-target group than compared within each country (see figure 4).

Surprisingly, net income (and education) cannot profile this interesting global target group whilst many other indicators are able to differentiate between target and non-target group. This leads to our next section, in which we examine to what extent regional or country specific aspects have an impact on global media acceptance.

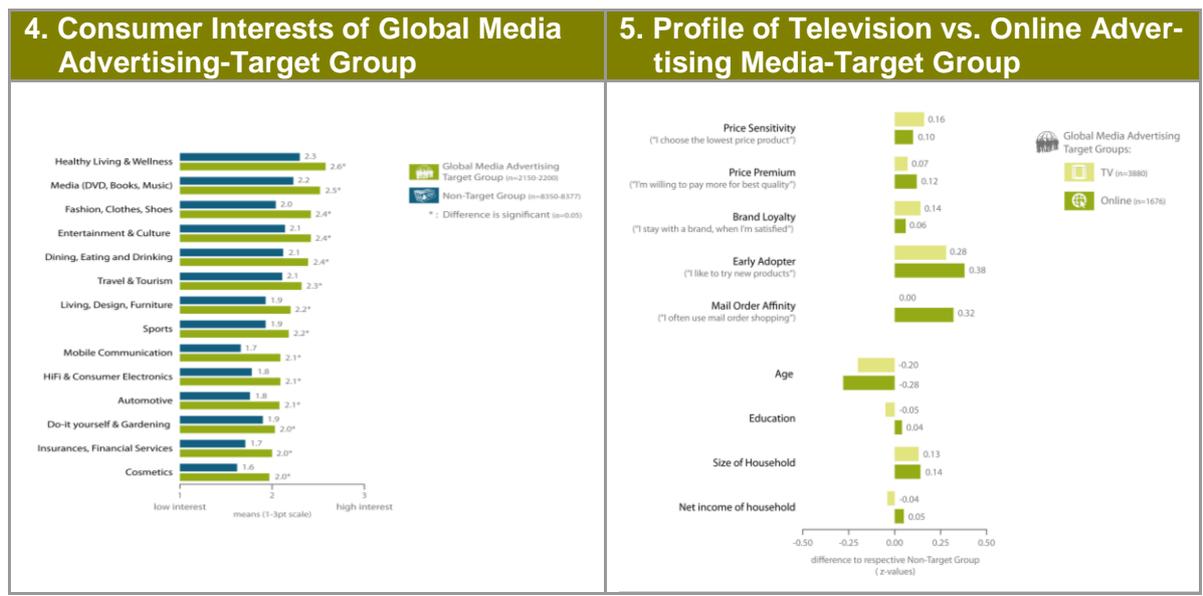


### Regional specifics for global Media Acceptance

To dig deeper into the regional specifics, we decided to split up the global marketing-target group into economic clusters. Beginning with faster growing markets (in the past years), Brazil, China, Czech Republic, India, Mexico and Poland are classified as part of the growing markets country set. These shall be compared with more mature markets. Actually, the net income tells a very interesting story: It distinguishes clearly between old economies, where the advertising media target-group earns significantly less, and emerging economies, where people with high advertising media acceptance have a significantly higher net income than the non-affine population in each country. This leads to the plausible conclusion that the financial elite of the old economies developed a reserved, more critical advertising media attitude which has not as yet affected younger economies.

### Old vs. new Advertising Media Channels: The global Target Group Changes

During the last 15 years, possibilities of online advertising or direct marketing constantly grew. Thus the next step of the analysis asks whether there exists a global online-target group, which differs from a more established, more analogue, non-interactive TV- target group. The analysis reveals a huge difference between both groups: The ideal online-target group has a more attractive socio-demographic profile than the TV-target group: younger, slightly more educated and with a tendency to earn a higher net income. Naturally, this will be attractive for the majority of advertising campaigns. Additionally, the online advertising-target group shows a substantially higher mail order affinity and is very open for new products and technologies. They have a male profile (52 percent vs. 47 percent in global analysis; which is not the case for the TV-target group) and reveal a very high interest for product categories electronics, mobile communication and automotive (see figure 5).



## Conclusion

The strong evidence for a homogeneous, distinct and attractive global target group for advertising media indicates that there is a common ground in each country for advertising media which is a solid basis for each cross-cultural campaign. That specific group is very open for new products, price sensitive and shows a characteristic socio-demographic profile. To refer to the main question of this paper: The world has moved together, there is a global consumer which indicates specific interests for various product types. A few aspects are additionally important and should be highlighted:

- To include online-media in global campaigns increases the probability to reach younger early adopters.
- In emerging markets it is more likely to reach a high-level target group (especially with regard to net income). Additionally, a global research approach should take emerging market into the scope as they show a specific profile

which differs from main western markets.

- Global campaigns addressing the core topics of interest like healthy living & wellness; media (DVD, books, music); fashion and entertainment are more likely to reach the core-target-group easily.

Nevertheless, every cross-regional campaign should take regional specifics into account. In terms of campaign design, visuals and wording, every cultural entity should be respected and each campaign needs adaptation for country specifics.

## References

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