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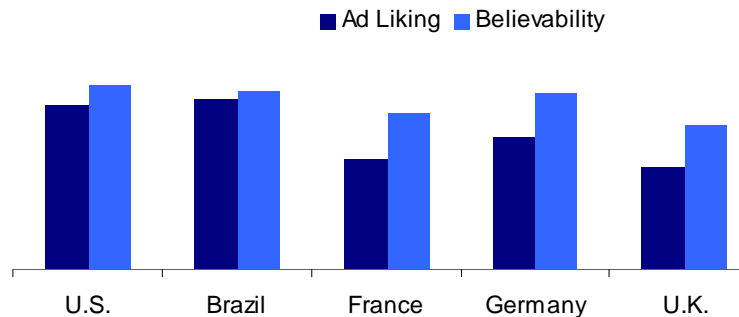
As we are pushed closer together by the global economy and international media, it is easy to forget how attitudes and preferences differ from one country to another. But think about such areas as politics, religion, food, fashion, and sex to name a few, and it is clear that thinking the world over is not yet universally the same. This has tremendous implications for the content and tone of the global messages that advertisers use to communicate. Despite the clear advantages that global campaigns can deliver as a result of heavy economies of scale and brand benefits from unifying messages, we still need to be cautious about what we say and how we test what we say. Research is showing that even in industrialized nations people's reactions can differ significantly. At the same time though, while different nationalities can respond differently to the same advertising messages, research is showing that these differences are not chaotic and that overall universals in responses do exist.

Gallup & Robinson, Inc. has employed its research techniques on a global basis for 35 years. In the past 10 years, we have accumulated data from more than 500 ads in 14 different countries in Europe, South America, and the Pacific Rim. Using this data, we have aggregated and averaged results by country for campaigns designed and tested for multiple countries as well as those developed for an individual country.

Towards Universals in Global Advertising Research

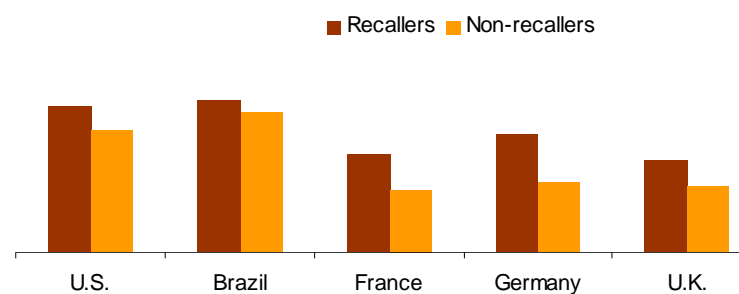
Country Average - Ad Reactions

Table 1



Country Average - Ad Liking

Table 2



These findings not only give us an important normative perspective, but also new insights about some of the differences and similarities in people's responses to advertising across the various countries, two of which are discussed below.

People Tend to *React* to Ads Similarly, but at Different Levels

It is now well known that rating levels vary quite a bit from country to country. Using two key attributes

as examples, Ad Liking and Believability, G&R found that people in some countries rate ads 25%-60% more highly than in other countries. For example, respondents in the United States and Brazil tend to rate advertising more highly on believability than respondents in any of several key European or Asian markets. Importantly, though, although the levels of ad reaction themselves vary, there was far greater consistency across the countries in rank order comparisons. For example, believability levels

always seem to rank higher than ad liking levels. (See Table 1) We are talking here about measures of *ad reaction*. The patterns for other measures of evaluative performance, such as recall and persuasion, are more complex.

People who Recall an Ad have more Positive Attitudes about the Ad than Those who Do Not

Although advertising reactions vary by country, people across all countries who recall an ad respond more positively to the advertising than those who do not. Depending on the country, however, the

degree of difference between recallers and non-recallers can vary. German recallers, for example, feel about 60% to 70% more positive about an ad than non-recallers. By contrast, Brazilian recallers feel 10% more positive about an ad than their Brazilian non-recaller counterpart. (See Table 2)

There seems to be growing support for what is still the minority view that human cognition is not the same everywhere. Our research is showing that significant differences exist across countries in how people respond to similar advertising messages. At the same

time we are learning that there are certain universals and dispositions. This knowledge will help our clients become more successful in researching and measuring the effectiveness of global ad campaigns, and better balancing global and local communications needs. 