re: think!

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Cross-Border Data Comparison – *Try Managing Without It*

Andrea Dinning
Global TGI
KMR

kmr

TGI

Global vs. Local

"Think globally, act locally"

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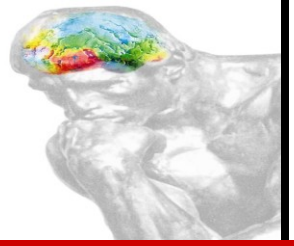

Global vs. Local

"Think globally, act locally"

2 views:

- Markets have become so homogenized that the same marketing approach can be adopted everywhere
- Variation exists between countries and cultures, highlighting the need for tailored approaches

- **A mix of both views is necessary**

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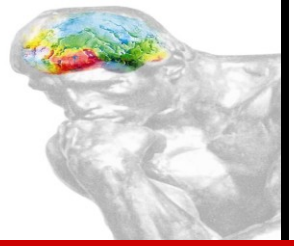

Global vs. Local

"Think globally, act locally"

1. Analyze each individual country
2. Build regional pictures
3. Build the global picture

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25,844	12,684	13,160	1,340	7,090	7,537	4,930	3,863	2,639	6,611	6,125	4,568	5,901	45,435	22,168	23,268	1,989	12,934	12,138	9668	8,707	10,7
98%	98%	98%	99%	98%	98%	98%	99%	99%	99%	97%	99%	97%	97%	97%	97%	94%	97%	98%	96%	96%	9
23,303	11,549	11,754	1,255	6,709	7,022	4,264	3,065	2,539	6,271	5,686	3,957	4,849	38,613	19,327	19,286	1,788	11,399	10,545	8074	6,807	9,7
89%	89%	88%	92%	92%	92%	85%	78%	95%	94%	90%	86%	80%	82%	84%	80%	85%	86%	85%	81%	75%	8
22,700	10,782	11,956	1,203	6,479	6,752	4,373	3,132	2,461	6,137	5,223	3,991	4,916	38,905	18,233	20,672	1,970	11,635	10,492	7920	6,888	9,7
2,412	2,448	2,376	2,033	2,294	2,358	2,515	2,580	2,270	2,296	2,580	2,536	2,570	83%	80%	86%	93%	87%	84%	79%	76%	8
23%	23%	22%	19%	22%	23%	23%	22%	24%	22%	23%	22%	20%	37,031	18,517	18,513	1,432	10,023	9,782	8270	7,523	9,(
492	429	553	641	554	488	452	422	532	512	493	431	435	79%	81%	77%	68%	75%	79%	83%	83%	8
5%	4%	5%	6%	5%	5%	4%	4%	6%	5%	4%	4%	3%	22,536	12,161	10,375	1,644	8,607	7,447	3753	1,084	7,6
1,013	1,140	893	1,088	1,007	967	1,057	1,019	1,064	989	1,083	971	865	48%	53%	43%	78%	65%	60%	37%	12%	6
9%	11%	8%	10%	10%	10%	10%	9%	11%	10%	10%	8%	7%	46,965	22,928	24,037	2,107	13,321	12,434	10019	9,085	11,(
315	402	232	546	456	391	225	57	484	382	231	162	119	6,534	6,241	6,815	6,572	6,197	5,927	6,696	7,648	5,3
3%	4%	2%	5%	4%	4%	2%	0%	5%	4%	2%	1%	1%	61%	59%	64%	61%	59%	59%	61%	66%	5
10,676	10,647	10,714	10,878	10,520	10,109	10,817	11,476	9,499	10,210	11,119	11,606	12,791	2,486	2,626	2,352	2,136	2,513	2,404	2,606	2,514	2,2
15,792	7,482	8,310	2,179	5,623	3,843	2,772	N/A	1,780	1,657	3,835	4,316	4,205	23%	25%	22%	20%	24%	24%	24%	22%	2
96%	96%	97%	97%	96%	96%	97%	N/A	97%	98%	96%	96%	96%	448	386	508	583	493	458	419	367	5
13,686	6,708	6,978	1,873	4,959	3,258	2,420	N/A	1,454	1,418	3,376	3,737	3,700	4%	4%	5%	5%	5%	5%	4%	3%	
83%	86%	81%	83%	84%	82%	85%	N/A	79%	84%	85%	83%	84%	996	1,118	881	988	954	1,011	1,071	961	1,0
45,876	22,365	23,511	1,964	12,683	12,336	10,106	8,788	11,498	12,998	9,599	7,616	4,166	9%	10%	8%	9%	9%	10%	10%	8%	
97%	97%	97%	96%	97%	98%	98%	96%	97%	97%	98%	96%	95%	220	287	156	413	317	270	152	30	3
39,411	19,738	19,673	1,793	11,396	10,877	8399	6,946	10,628	11,364	8,150	6,093	3,176	2%	3%	1%	4%	3%	3%	1%	0%	
83%	86%	81%	88%	87%	86%	81%	76%	90%	85%	83%	77%	72%	10,684	10,657	10,711	10,692	10,474	10,070	10,945	11,520	9,4
39,619	18,664	20,955	1,894	11,856	10,603	8180	7,079	10,478	11,535	8,119	6,160	3,327	45,461	22,176	23,285	2,188	13,063	11,763	9,755	8,693	10,8
84%	81%	87%	93%	90%	84%	79%	77%	89%	86%	83%	78%	76%	97%	97%	97%	97%	98%	98%	98%	96%	9
35,222	17,752	17,470	1,372	9,266	9,020	8200	7,364	9,196	9,809	7,536	5,722	2,960	39,071	19,417	19,654	1,953	11,490	10,492	8,127	7,034	9,7
75%	77%	72%	67%	71%	72%	80%	81%	78%	73%	77%	73%	68%	84%	85%	82%	86%	86%	87%	82%	78%	8
25,663	13,663	12,000	1,679	9,251	8,409	4821	1,502	8,731	8,561	4,591	2,688	1,092	38,001	17,801	20,200	2,114	11,675	10,012	7,729	6,472	9,6
54%	59%	50%	82%	70%	67%	47%	16%	74%	64%	47%	34%	25%	81%	78%	84%	93%	87%	83%	78%	71%	8
47,253	23,034	24,219	2,039	13,143	12,614	10,313	9,144	11,793	13,355	9,831	7,892	4,381	38,493	19,138	19,355	1,703	10,207	10,024			
6,240	5,460	7,020	4,050	5,430	6,210	7,574	9,240	5,430	5,970	6,510	7,020	6,540	82%	84%	81%	75%	76%	83%			
71%	63%	78%	84%	70%	69%	70%	76%	66%	69%	72%	73%	71%	17,909	9,864	8,044	1,438	6,855	5,823			
1,170	1,530	780	210	990	1,260	1,676	1,050	960	1,260	1,260	1,260	1,380	38%	43%	34%	64%	51%	48%			
6,552	6,282	6,822	6,930	6,228	6,030	6,570	7,722	5,148	6,066	6,768	7,632	8,982	46,685	22,753	23,932	2,261	13,356	12,045			
61%	58%	64%	61%	59%	59%	61%	67%	54%	59%	61%	66%	71%	6,429	6,140	6,705	6,466	6,098	5,832			
2,419	2,623	2,223	2,422	2,354	2,398	2,578	2,367	2,296	2,377	2,639	2,441	2,322	59%	57%	62%	59%	59%	57%			
22%	24%	21%	21%	22%	23%	24%	21%	24%	23%	24%	21%	18%	2,762	2,909	2,622	2,674	2,619	2,647			
462	400	521	574	522	471	417	383	517	485	454	405	390	26%	27%	24%	24%	25%	26%			
4%	4%	5%	5%	5%	5%	4%	3%	5%	5%	4%	3%	3%	444	387	498	526	468	452			
1,010	1,133	893	953	998	1,001	1,075	982	1,080	998	1,039	990	861	4%	4%	5%	5%	5%	4%			
9%	10%	8%	8%	9%	10%	10%	9%	11%	10%	9%	9%	7%	1,040	1,157	929	1,150	983	1,038			
311	399	226	486	477	381	203	45	499	388	237	145	104	10%	11%	9%	10%	9%	10%			
3%	4%	2%	4%	5%	4%	2%	0%	5%	4%	2%	1%	1%	137	196	81	204	203	175			

Help is at hand

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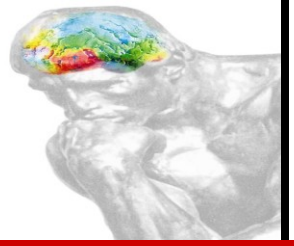

Chernoff's Faces

- Developed by Herman Chernoff (1973)
- Method of pictorially representing multi-dimensional data, using the characteristics of the human face

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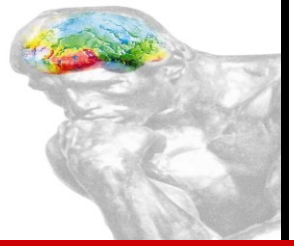

Chernoff's Faces

- Each facial feature represents a variable, i.e. age 25-34
- Up to ten facial features can be used – allowing representation of up to 10 variables

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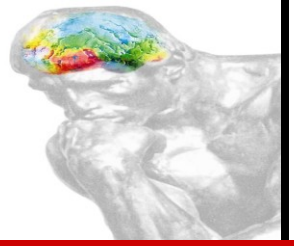
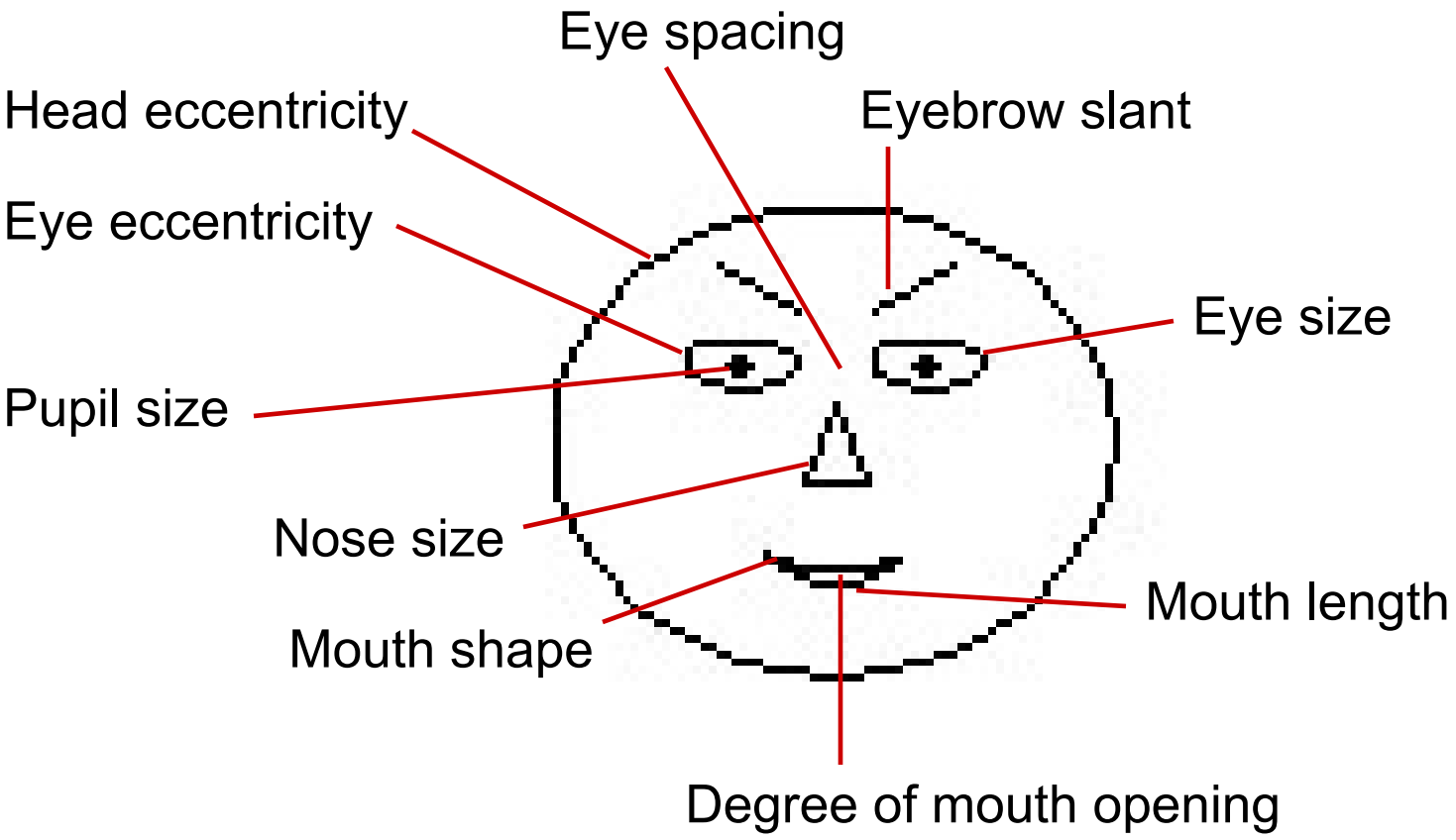


Chernoff's Faces



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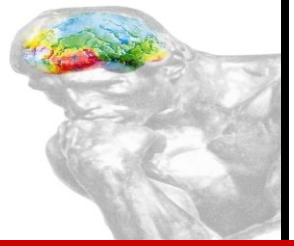
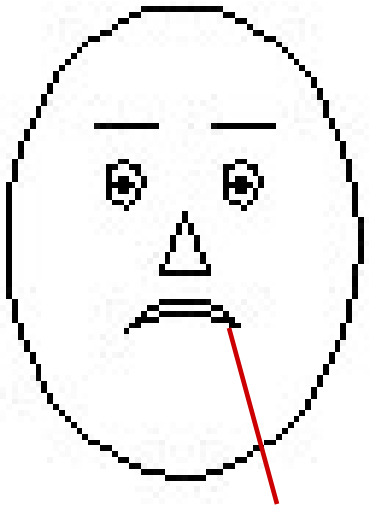
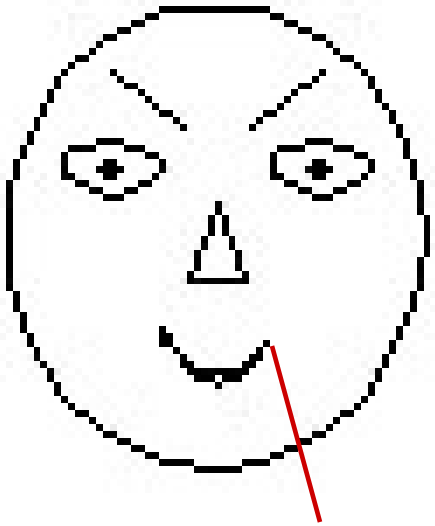


Chernoff's Faces

- The index for each variable is assigned a value between 0 and 1
- 0 represents the lowest index; 1 represents the highest index



Value of 0



Value of 1

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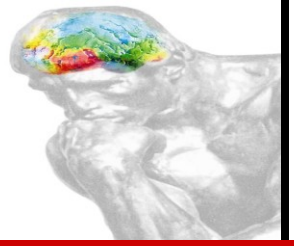

Applications

- Apply Chernoff's Faces to the analysis of brand profiles
- This method can be used to:
  - compare the same brands in 2+ markets
  - compare a brand with its competitors
  - track trends over time
- Simple representation that provides global themes and local differences at a glance

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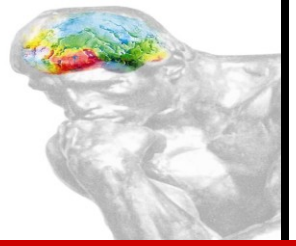

Case Study:

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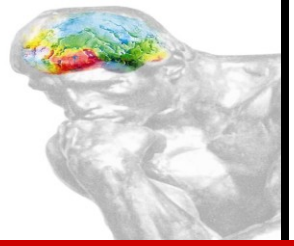


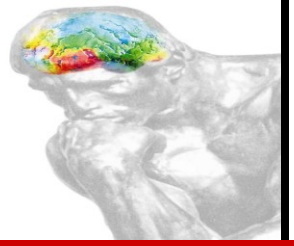
Levi's Jeans

"As US (and to some extent, Western European) marketers continue to export Western popular culture to a globe full of increasingly affluent consumers, many are eagerly waiting to replace their traditional products and practices with the likes of McDonald's, Levi's and MTV"

Michael Solomon

Consumer Behavior: Buying, Having and Being

- Established global market
- Is there a global consumer?
- They have a brand of jeans in common but what else?



Countries

TGI data from:

Argentina
Brazil
Bulgaria
Chile
China
Colombia
Croatia
Czech Republic
Ecuador
France
Germany
Great Britain
Greece
India
Ireland
Israel
Mexico
Peru
Poland
Puerto Rico
Romania
Russia
Spain
Venezuela

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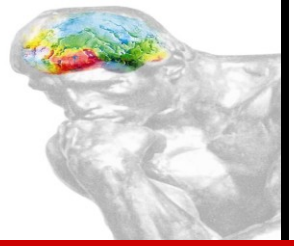
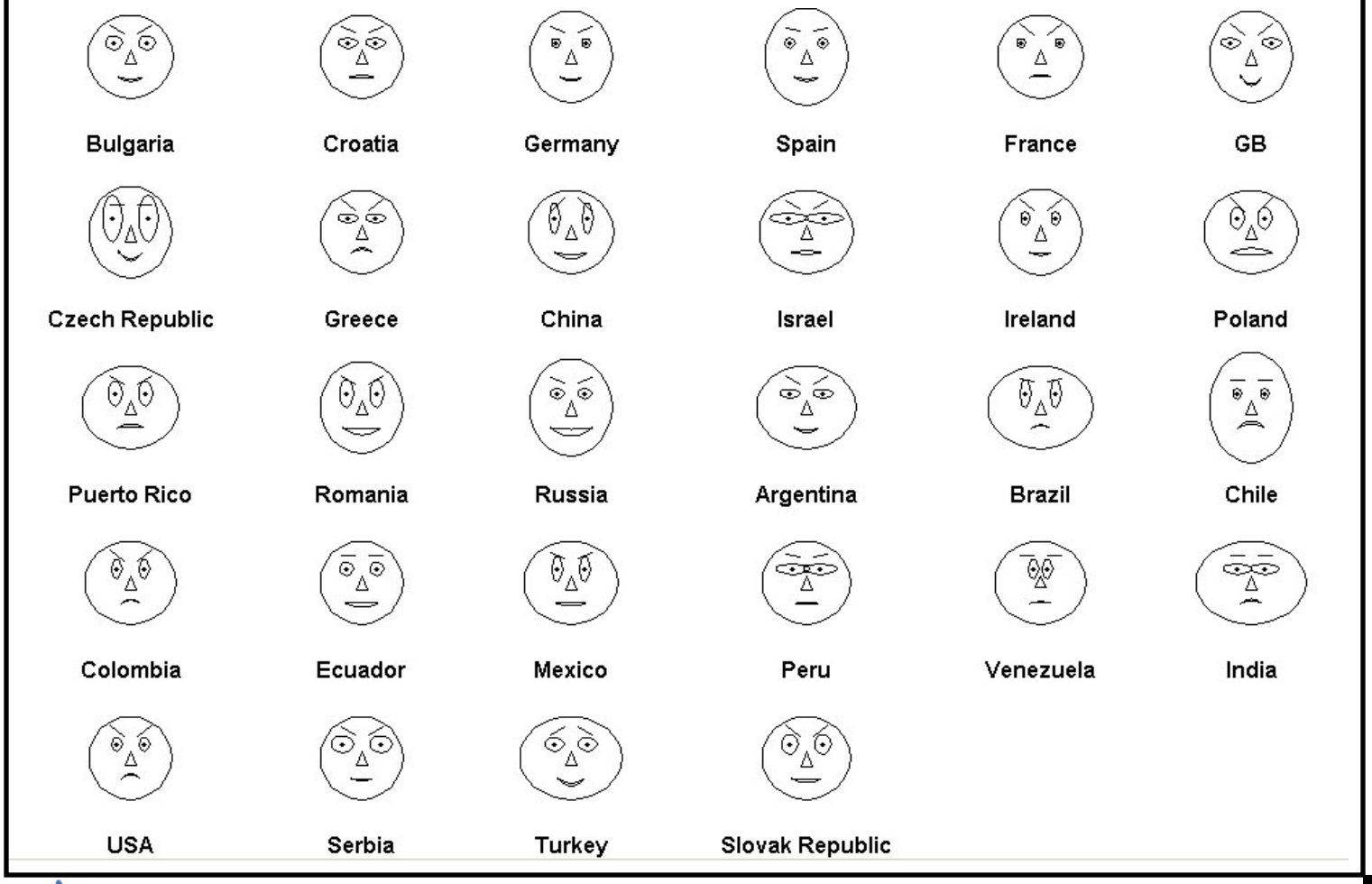


Variables

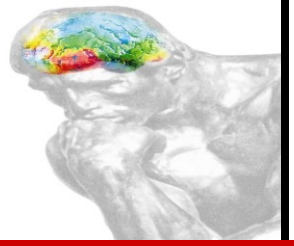
Age 25-34	Head eccentricity
Female	Eye eccentricity & Pupil size
SEL AB	Eyebrow slant
“I like to stand out in a crowd”	Nose size
“I like to keep up with the latest fashions”	Mouth shape
“A designer label improves a person’s image”	Eye spacing
“I always look for special offers when I shop”	Eye size
“It’s worth paying more for quality goods”	Mouth length & degree of opening

Source: Global TGI 2003

Levi's Jeans

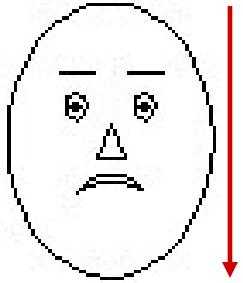


Source: Global TGI 2003

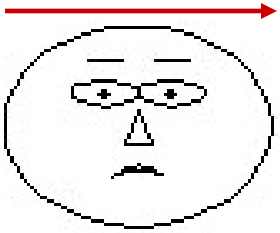


Age 25-34

Levi's jeans wearers are more likely to be aged 25-34 in Chile



Chile



India

- Head Eccentricity = Age 25-34
- a very elongated head represents a value of 1
- a value of 1 represents a high index
- the head shape for India represents a value of 0
- a value of 0 represents a low index

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Source: Global TGI 2003

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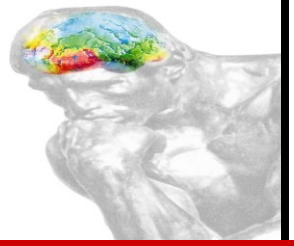
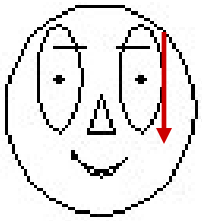


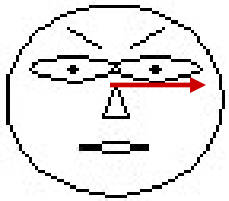
Gender

Levi's jeans wearers are more likely to be female in the Czech Republic



Czech Republic

- Eye Eccentricity = Female
- very elongated eyes represent a value of 1
- a value of 1 represents a high index



Israel

- the eye shape for Israel represents a value of 0
- a value of 0 represents a low index

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Source: Global TGI 2003

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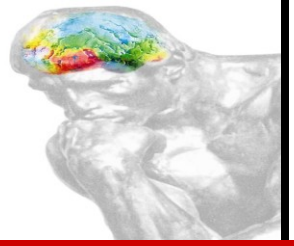
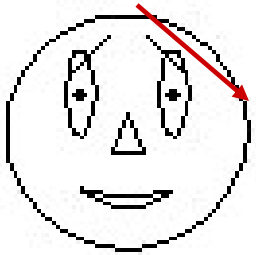


Socio-Economic Level

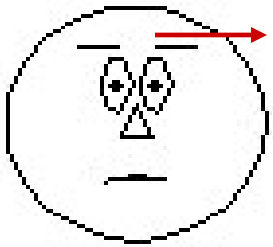
Levi's jeans wearers are more up-market in China, compared to the USA

- Eyebrow Slant = High Socio-Economic Level



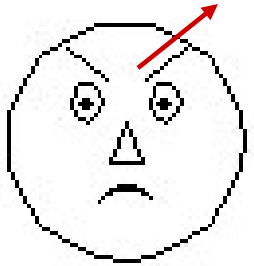
China

Value 1



Venezuela

Value 0.5



USA

Value 0

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Source: Global TGI 2003

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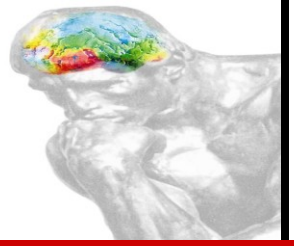
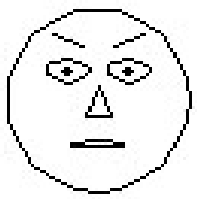
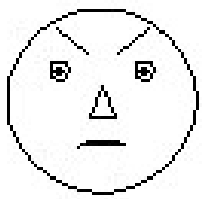


"I like to stand out in a crowd"

Generally, Levi's jeans wearers around the world agree with this statement

- Nose Size = agreement with "*I like to stand out in a crowd*"


Croatia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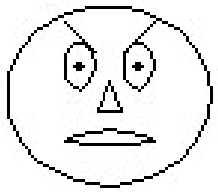
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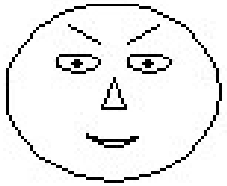
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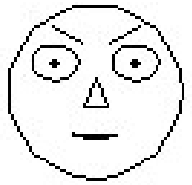
Serbia

Despite differences in other facial features, the nose size is fairly consistent across countries

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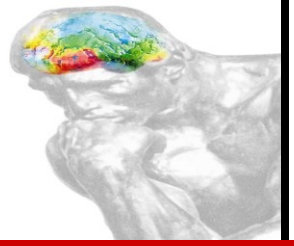
Source: Global TGI 2003

kmr

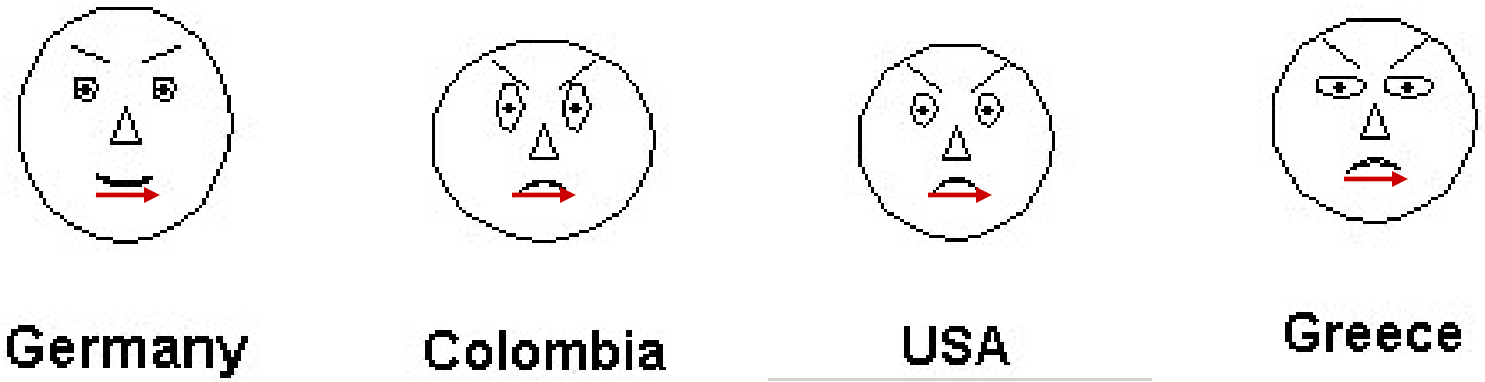


"It's worth paying more for quality goods"

Levi's jeans wearers around the world tend to disagree with this statement

- Mouth length and degree of opening = agreement with

"*It's worth paying more for quality goods*"



ARF
The Research Authority

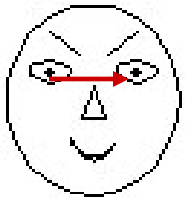
Source: Global TGI 2003

kmr

"A Designer label improves a person's image"

Generally, Levi's jeans wearers around the world agree with this statement

- Eye Spacing = agreement with "*A Designer label improves a person's image*"



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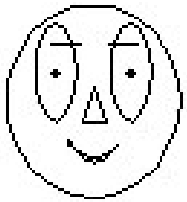
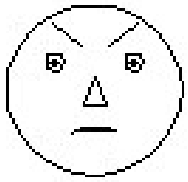


Czech Republic

Venezuela



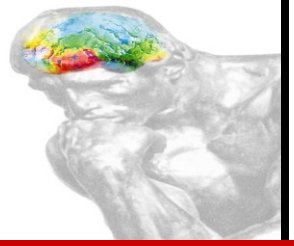
France

Serbia

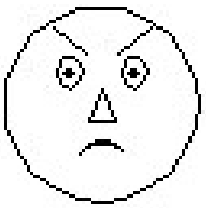
ARF The Research Authority

Source: Global TGI 2003

kmr



Global vs. Local



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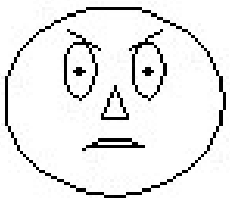

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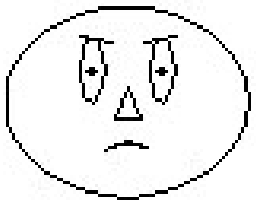

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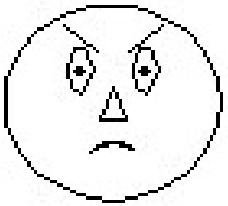
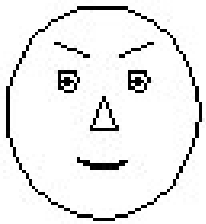


Colombia



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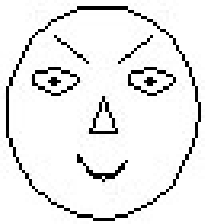

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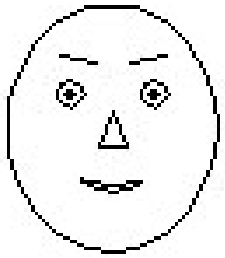

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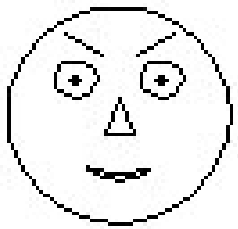
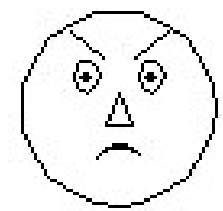


Bulgaria

Global vs. Local



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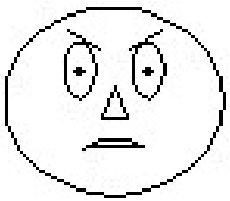

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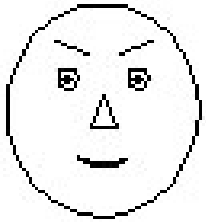

Germany

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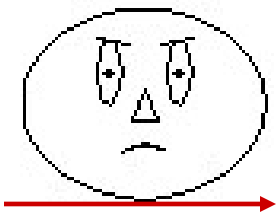

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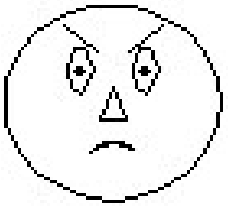
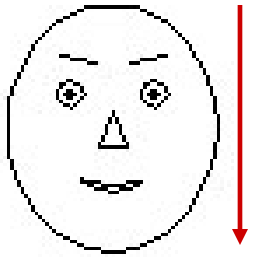


Colombia



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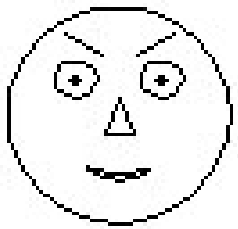
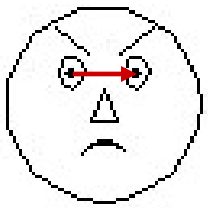


Bulgaria

Global vs. Local



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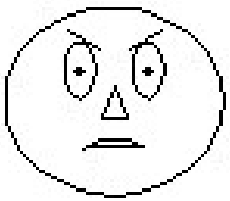

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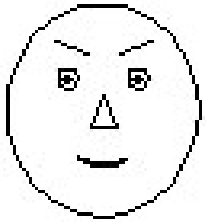

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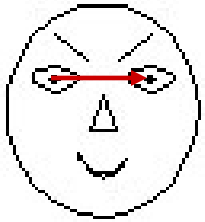

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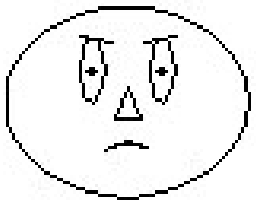

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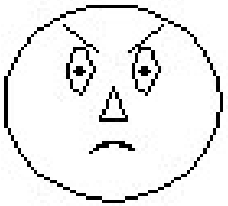

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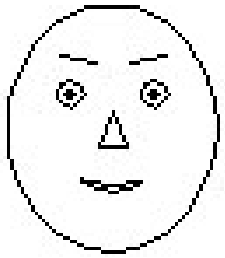

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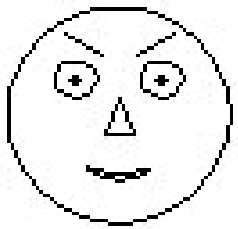

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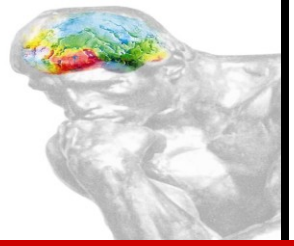
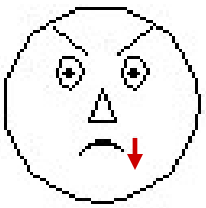


Global vs. Local



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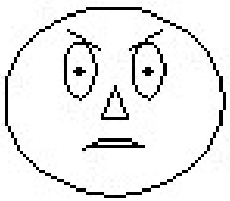

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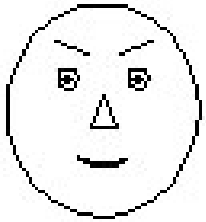

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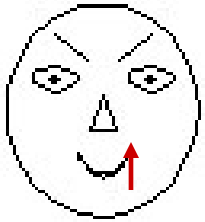

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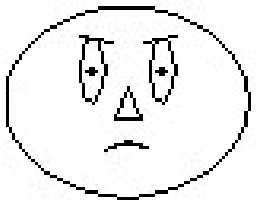

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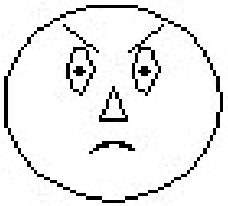

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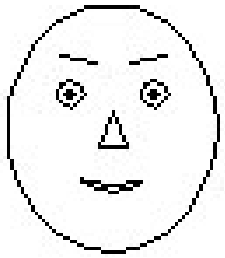

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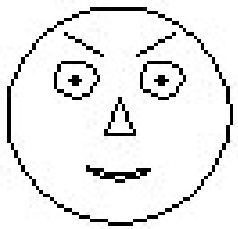
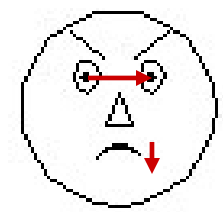


Bulgaria

Global vs. Local



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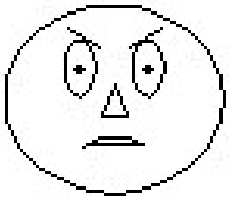

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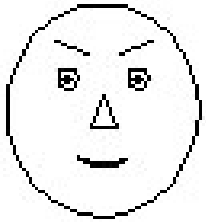

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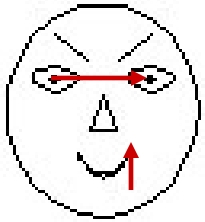

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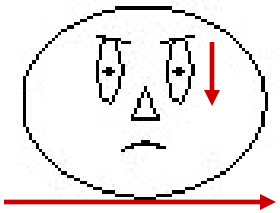

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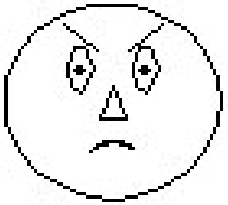

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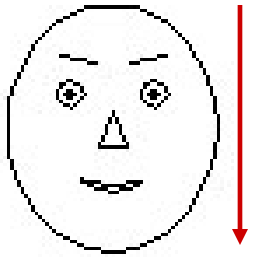

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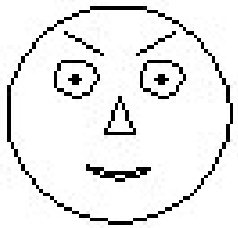
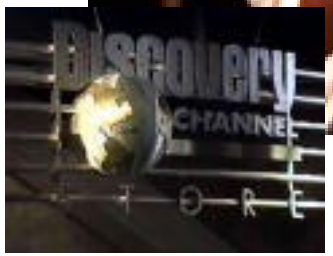


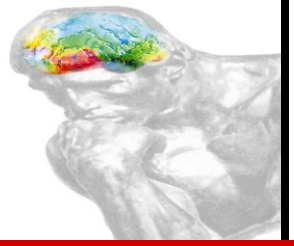
Bulgaria

Global vs. Local



LEVI'S

$



Summary

• Through the analysis of Chernoff's Faces, common global themes have easily been identified, as well as local differences

Global themes:
- Image of Designer labels
- Price vs. Quality

Regional/Local differences:
- Demographic profiles
- Attitudes towards fashion

They wear the same jeans but they are not the same people

• The first step in understanding how to approach and communicate with Levi's Jeans wearers around the world

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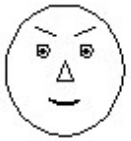
TGI

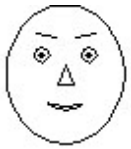
25,844	12,684	13,160	1,340	7,090	7,537	4,930	3,863	2,639	6,611	6,125	4,568	5,901	45,435	22,168	23,268	1,989	12,934	12,138	9668	8,707	10,7
98%	98%	98%	99%	98%	98%	98%	99%	99%	99%	97%	99%	97%	97%	97%	97%	94%	97%	98%	96%	96%	9
23,303	11,549	11,754	1,255	6,709	7,022	4,264	3,065	2,539	6,271	5,686	3,957	4,849	38,613	19,327	19,286	1,788	11,399	10,545	8074	6,807	9,7
89%	89%	88%	92%	92%	92%	85%	78%	95%	94%	90%	86%	80%	82%	84%	80%	85%	86%	85%	81%	75%	8
22,700	10,782	11,956	1,203	6,479	6,752	4,373	3,132	2,461	6,137	5,223	3,991	4,916	38,905	18,233	20,672	1,970	11,635	10,492	7920	6,888	9,7
2,412	2,448	2,376	2,033	2,294	2,358	2,515	2,580	2,270	2,296	2,580	2,536	2,570	83%	80%	86%	93%	87%	84%	79%	76%	8
23%	23%	22%	19%	22%	23%	23%	22%	24%	22%	23%	22%	20%	37,031	18,517	18,513	1,432	10,023	9,782	8270	7,523	9,(
492	429	553	641	554	488	452	422	532	512	493	431	435	79%	81%	77%	68%	75%	79%	83%	83%	8
5%	4%	5%	6%	5%	5%	4%	4%	6%	5%	4%	4%	3%	22,536	12,161	10,375	1,644	8,607	7,447	3753	1,084	7,6
1,013	1,140	893	1,088	1,007	967	1,057	1,019	1,064	989	1,083	971	865	48%	53%	43%	78%	65%	60%	37%	12%	6
9%	11%	8%	10%	10%	10%	10%	9%	11%	10%	10%	8%	7%	46,965	22,928	24,037	2,107	13,321	12,434	10019	9,085	11,(
315	402	232	546	456	391	225	57	484	382	231	162	119	6,534	6,241	6,815	6,572	6,197	5,927	6,696	7,648	5,3
3%	4%	2%	5%	4%	4%	2%	0%	5%	4%	2%	1%	1%	61%	59%	64%	61%	59%	59%	61%	66%	5
10,676	10,647	10,714	10,878	10,520	10,109	10,817	11,476	9,499	10,210	11,119	11,606	12,791	2,486	2,626	2,352	2,136	2,513	2,404	2,606	2,514	2,2
15,792	7,482	8,310	2,179	5,623	3,843	2,772	N/A	1,780	1,657	3,835	4,316	4,205	23%	25%	22%	20%	24%	24%	24%	22%	2
96%	96%	97%	97%	96%	96%	97%	N/A	97%	98%	96%	96%	96%	448	386	508	583	493	458	419	367	5
13,686	6,708	6,978	1,873	4,959	3,258	2,420	N/A	1,454	1,418	3,376	3,737	3,700	4%	4%	5%	5%	5%	5%	4%	3%	
83%	86%	81%	83%	84%	82%	85%	N/A	79%	84%	85%	83%	84%	996	1,118	881	988	954	1,011	1,071	961	1,0
45,876	22,365	23,511	1,964	12,683	12,336	10,106	8,788	11,498	12,998	9,599	7,616	4,166	9%	10%	8%	9%	9%	10%	10%	8%	
97%	97%	97%	96%	97%	98%	98%	96%	97%	97%	98%	96%	95%	220	287	156	413	317	270	152	30	3
39,411	19,738	19,673	1,793	11,396	10,877	8399	6,946	10,628	11,364	8,150	6,093	3,176	2%	3%	1%	4%	3%	3%	1%	0%	
83%	86%	81%	88%	87%	86%	81%	76%	90%	85%	83%	77%	72%	10,684	10,657	10,711	10,692	10,474	10,070	10,945	11,520	9,4
39,619	18,664	20,955	1,894	11,856	10,603	8180	7,079	10,478	11,535	8,119	6,160	3,327	45,461	22,176	23,285	2,188	13,063	11,763	9,755	8,693	10,8
84%	81%	87%	93%	90%	84%	79%	77%	89%	86%	83%	78%	76%	97%	97%	97%	97%	98%	98%	98%	96%	9
35,222	17,752	17,470	1,372	9,266	9,020	8200	7,364	9,196	9,809	7,536	5,722	2,960	39,071	19,417	19,654	1,953	11,490	10,492	8,127	7,034	9,7
75%	77%	72%	67%	71%	72%	80%	81%	78%	73%	77%	73%	68%	84%	85%	82%	86%	86%	87%	82%	78%	8
25,663	13,663	12,000	1,679	9,251	8,409	4821	1,502	8,731	8,561	4,591	2,688	1,092	38,001	17,801	20,200	2,114	11,675	10,012	7,729	6,472	9,6
54%	59%	50%	82%	70%	67%	47%	16%	74%	64%	47%	34%	25%	81%	78%	84%	93%	87%	83%	78%	71%	8
47,253	23,034	24,219	2,039	13,143	12,614	10,313	9,144	11,793	13,355	9,831	7,892	4,381	38,493	19,138	19,355	1,703	10,207	10,024			
6,240	5,460	7,020	4,050	5,430	6,210	7,574	9,240	5,430	5,970	6,510	7,020	6,540	82%	84%	81%	75%	76%	83%			
71%	63%	78%	84%	70%	69%	70%	76%	66%	69%	72%	73%	71%	17,909	9,864	8,044	1,438	6,855	5,823			
1,170	1,530	780	210	990	1,260	1,676	1,050	960	1,260	1,260	1,260	1,380	38%	43%	34%	64%	51%	48%			
6,552	6,282	6,822	6,930	6,228	6,030	6,570	7,722	5,148	6,066	6,768	7,632	8,982	46,685	22,753	23,932	2,261	13,356	12,045			
61%	58%	64%	61%	59%	59%	61%	67%	54%	59%	61%	66%	71%	6,429	6,140	6,705	6,466	6,098	5,832			
2,419	2,623	2,223	2,422	2,354	2,398	2,578	2,367	2,296	2,377	2,639	2,441	2,322	59%	57%	62%	59%	59%	57%			
22%	24%	21%	21%	22%	23%	24%	21%	24%	23%	24%	21%	18%	2,762	2,909	2,622	2,674	2,619	2,647			
462	400	521	574	522	471	417	383	517	485	454	405	390	26%	27%	24%	24%	25%	26%			
4%	4%	5%	5%	5%	5%	4%	3%	5%	5%	4%	3%	3%	444	387	498	526	468	452			
1,010	1,133	893	953	998	1,001	1,075	982	1,080	998	1,039	990	861	4%	4%	5%	5%	5%	4%			
9%	10%	8%	8%	9%	10%	10%	9%	11%	10%	9%	9%	7%	1,040	1,157	929	1,150	983	1,038			
311	399	226	486	477	381	203	45	499	388	237	145	104	10%	11%	9%	10%	9%	10%			
3%	4%	2%	4%	5%	4%	2%	0%	5%	4%	2%	1%	1%	137	196	81	204	203	175			

Bulgaria

Croatia



Germany

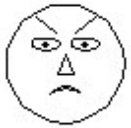


Spain

France

GB

Czech Republic



Greece

China

Israel

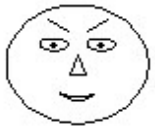
Ireland

Poland

Puerto Rico

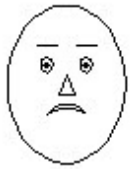
Romania

Russia



Argentina

Brazil



Chile

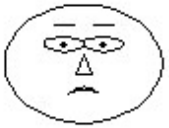
Colombia

Ecuador

Mexico

Peru

Venezuela



India

USA

Serbia

Turkey

Slovak Republic

re: think!

ARF
The Research Authority

Cross-Border Data Comparison –
Try Managing Without It

Thank you

kmr

TGI