



Media choices in a changing world

The Arab consumer - Changing lifestyle and values

Importance of collectivism and social harmony



Though social belonging remains important, youth are increasingly responding to individualistic traits like personal freedom and self-expression



Traditional influences of 'religion' and 'culture'

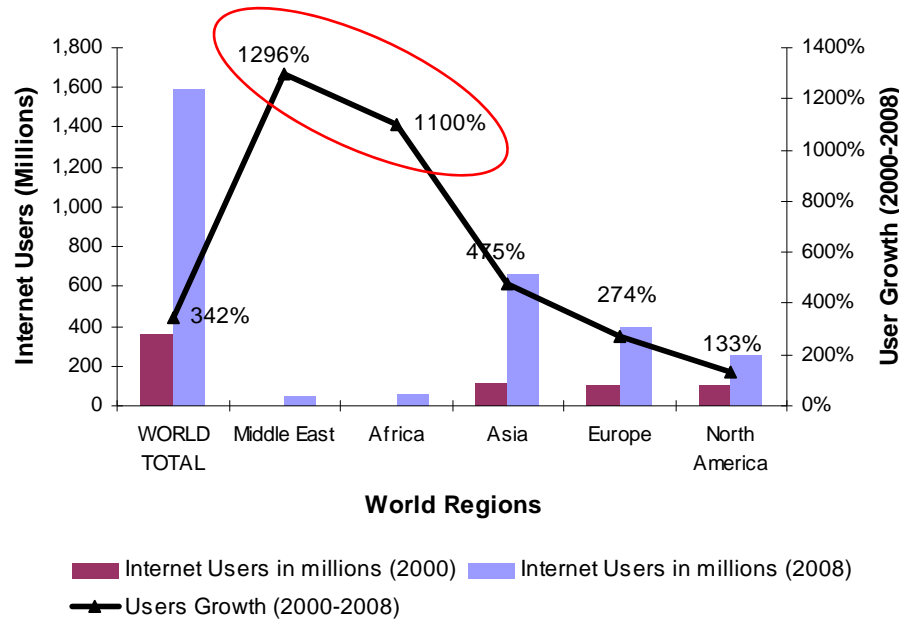


Foreign media, brands and 'Western Lifestyle' becoming increasingly attractive. Consumers seeking a balance between traditional and modern influences; seek the 'best of both worlds'



MENA region witnessing exponential growth in Emerging Media like Internet and Mobile Phones

World Internet Usage and Growth (2000-2008)



Source: Internet World Stats, ITU 08

High levels of mobile phone penetration in the Gulf region. UAE has a mobile penetration rate of 173 percent at the end of 2007, the KSA reached 115 percent and Kuwait stood at 97 percent

Source: Inter-Arab Investment Guarantee Corporation, www.Internetworldstats.com

Greater exposure to internet and mobile connectivity has been shown to bring about changes in the media consumption as well as buying behavior

Studies in the US have shown that with increased exposure to Internet and Mobile Phones **people tend to spend less time on traditional media, shopping tends to become more 'from home' and social isolation tends to increase**

Source: Stanford Institute for the Quantitative Study of Society
Base: 4000 net users in US

THE MIDDLE EAST IS SET TO WITNESS SIMILAR CHANGES



Celebrating a decade of insight based consultancy in the MENA region

Media trends already visible in the region

A more connected consumer with access to a wealth of information, technology and varied influences



Consumers are finding new ways of communicating and connecting, leading to....



Next wave – Convergence of mobile, internet and TV

Mobile phones with high speed internet access and TV are likely to revolutionize the media landscape – happening much faster than we probably realize!!

Awareness

The Internet is fast becoming the main source of information and awareness for the youth in the Gulf



Empowerment

Blogs and social networking sites are enabling youth to share opinions and interact with like-minded people



Activation

Social protests in Egypt being mobilized through social networking websites like Facebook



This gives rise to many questions

▶ How are these changes likely to impact consumer access of traditional media?



▶ How can one target consumers better through emerging media channels?



Am I sure that my advertising dollars are being utilized in the right media?

How do I optimize my media mix to achieve the maximum consumer connect?



What kind of communication does my consumer connect with on various media?

What kind of messages can I communicate via different connection points?

How can Qualitative research help?

Consumers are connecting in different ways with each other and with brands



Qualitative research can help **understand which of these connections provide opportunities for marketers**

Engagement
with Media Channels

Receptivity
to Communication

Relevance for
Brand Proposition



Media Cues & Insights

A combination of traditional and new age methodologies are used

Mini Group Discussions



Understanding attitudes towards various media and specifics of media interaction

Understanding the impact of communication on various media

Diaries – could be online



Understanding consumer lifestyle and media interaction throughout a typical week

Blogs & Twitter



Tracking the target audience on blogs and twitter in order to understand the media accessed and trends therein

Some Insights - Opportunities in Traditional Media

TV → Still the dominant medium. A tool for infotainment → TV communication needs to reflect this. Need to integrate brand messages with the dominant need from the medium.

Youth prefer fast paced and visually attractive content to purely intellectual or creative content



Communication based on creativity and humor work, however, needs to be easily comprehensible → creative leaps often do not work



Brands promises based on enhanced self-confidence, fantasy/escape and instant gratification tend to work



Communication with emotional overtones holds appeal → strongly relate to themes of social bonding, appreciation, relationships and romance



Emerging media - Tapping into a new wave

Internet, Mobile Phones

Enhanced choice and convergence is driving consumers to spend more time on the Internet and Mobile Phone

Acts as a social connector, a tool of empowerment, means of self-expression and a bridge to offset the information gap.

Brands based on platforms of social belonging and self-expression can tie up with social networks and blogs



Information is a means of empowerment → opportunity for brand to establish expertise through information dissemination



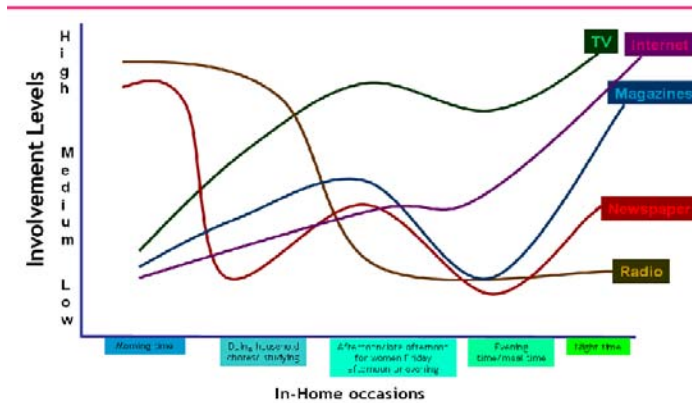
Mobile Phone is a source of connectivity and entertainment rather than information → opportunity to spread the 'brand message' through applications, games/contests



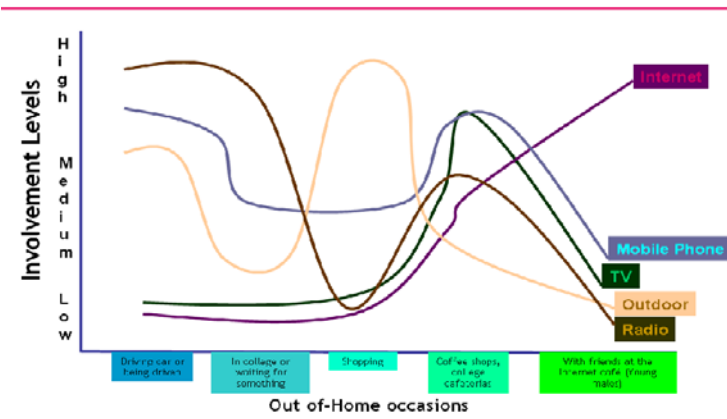
What output can one expect - Case Study

Identifying occasions when maximum media impact can be achieved
 Mapping involvement with media – both In-Home & Out-of-Home

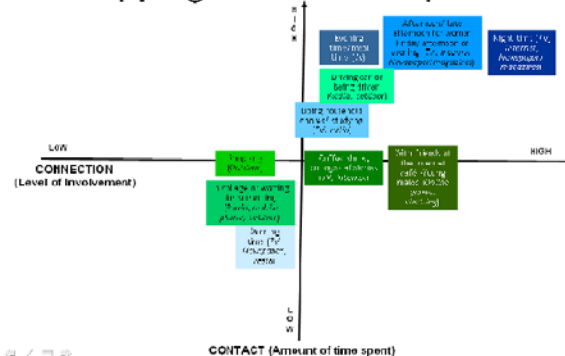
Perceptual mapping of involvement levels with media- In-Home



Perceptual mapping of involvement levels with media- Out of Home



Mapping media touch points



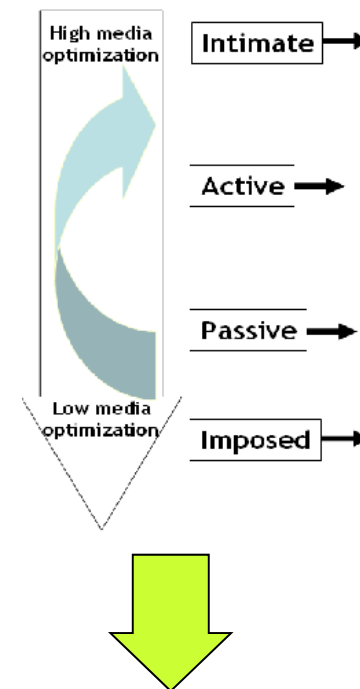
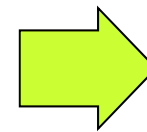
Mapping the media occasions in terms of:

- a. Contact – Amount of time spent
- b. Connection – Level of involvement

What output can one expect - Case Study

Identifying media content where the consumer is involved in the most 'Intimate' manner

Content on each media is mapped based on involvement levels. Mapped as: Imposed, **Passive**, **Active**, & **Intimate**



Arriving at media content (in each media) with the most **Intimate** connection with the consumer

- Changing lifestyles and media landscape within the Arab world necessitate a rethink of the traditional TV based advertising model ... paradigm shift required from 'Communicate' to 'Engage'.
- Qualitative research, using a mix of both traditional and new age techniques, can help to provide a better understanding of connections points that resonate with consumers and also have relevance for the brand proposition.
- Insights can be taken further into quantitative research to help in designing an optimal media mix.