

## Don't miss the digital trolley – Are brands prepared for a world without rules and constantly changing?<sup>1</sup>

### Não perca o bonde do mundo digital - As marcas estão preparadas para o mundo sem regras e em constante mutação?

**Fernanda Alicia Torrez Alcocer Bassanello**  
Millward Brown Brasil, São Paulo, SP, Brazil

#### ABSTRACT

*The article analyzes the changes in the technology that we have faced in the last decade and how it directly impacts on the individual not only in their leisure time, but also when it assumes its role of consumer and shopper. The analysis details the online universe and consumer relationship with this, and how brands can take advantage of this to impact more and more consumers and engage in strategic moments prior to arrival at the point of sale. As an example, the article analyzes the automotive industry and the consumer purchasing journey and provides some opportunities for the future.*

**KEYWORDS:** *Online; Consumer; Marketing Trends.*

#### RESUMO

Este artigo analisa as mudanças tecnológicas que temos enfrentado na última década e como isso impacta diretamente no indivíduo não só em seus momentos de lazer, mas também quando este assume seu papel de consumidor e *shopper*. A análise detalha o universo *on-line* e a relação do consumidor com este, e como as marcas podem se aproveitar disso para impactar cada vez mais consumidores e participar de momentos estratégicos antes da chegada ao ponto de venda. Como exemplo, o artigo analisa a indústria automotiva e a jornada de compra do consumidor e prevê algumas oportunidades para o futuro.

**PALAVRAS-CHAVE:** *On-line; Consumidor; Tendências.*

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#### **Fernanda Alicia Torrez Alcocer Bassanello**

Postgraduate Master's Degree in Marketing from Escola Superior de Propaganda e Marketing. Senior Market Research Analyst at Millward Brown Brazil.

(CEP 01310-200, São Paulo, SP, Brazil).

E-mail: fe\_alicia@hotmail.com; fernanda.bassanello@millwardbrown.com;

Address: Av. Paulista, 2064, 9º andar, 01310-200, São Paulo, SP, Brazil.

## 1 THE WORLD HAS CHANGED

It was September 11, 2001, a day like any other. I woke up early and went to school, I had a geography test and couldn't be late. After I finished the test I was talking to some friends about the possible answers to the test when I decided to call my mother to ask how long she would take to pick me up. I had only gotten that cellphone a few weeks ago, and I was already very fond of it, imagine being able to call my mother and friends whenever I wanted to? That was awesome. Anyway, I called my mother and she told me that a plane had crashed into the WTC in New York, and that she would be late because she was watching it on television, they were broadcasting it live! I hung up the phone and went to talk to my friends. Did anyone know what was going on? Did anyone know what the WTC was?! No one had much information, so I had to wait to get home to learn about it. The towers collapse was broadcast live on television, many people filmed and sent the videos to the media: that was the broadcast of the century.

Terrorists claimed responsibility for the attacks through television as well, the Arab Al-Jazira broadcaster televised the confession. We were living the golden age of offline media, which had plenty of news on the subject for the next few days and months. I remember that for days that was the subject in the classroom, on the radio and on television. Everyone was talking about the terrorist attacks and how catastrophic that was to the world. Several magazines, at the time, published photos of the attack, as shown in Figure 1.



**Figure 1** – Photos of the attack printed on magazine covers

Fourteen years later, on November 13, 2015, on a Friday the 13th, a day surrounded by superstition, I left work early. I needed to go to Etna (furniture and home furnishing store) to buy a bookcase, and I was almost there when I received an *WhatsApp* message from my mother. She said, “honey, there was a massacre at the Bataclan in Paris.” I immediately went online on my cellphone and started searching for the news about the attack. I opened another page and googled to learn what was Bataclan (again I didn't know the location of the attacks). I started to read the news, to look for friends online to try to understand what was going on. I visited YouTube and there were already videos from inside the Bataclan and other places that were hit, people who were inside recorded scenes and posted live on YouTube. Twitter was in full swing, people were offering shelter to those in need through the hashtag *#PorteOuverte* (open door, in French). Figure 2 shows a screenshot of the hashtag.



Figure 2 – Screenshot of the hashtag #PorteOuverte

On Facebook people voiced their opinion against the terrorist act or just showed solidarity with the victims. Even Facebook decided to help and created a safety check tool so users could let others know they were safe in Paris (Figure 3).



Figure 3 – Safety check tool

Everything was happening very fast and it changed at every second. The broadcast ceased to be live and became real-time. The recipients of the message became sender. Everyone wanted to comment, to participate, to show the world their outrage. Conversations during class turned into instant messages and the world, in that moment, realized that nothing would ever be the same.

## 2 THE WORLD CHANGED AND CONSUMERS DID TOO

Changes in technology have had an immediate impact on how people communicate, interact, and relate. People have changed, the audience has changed, and the way they interact in their daily roles also changed. In short, consumers have changed. In this multiscreen world, the target definition disappears and now consumers, when grouped together, do so for their common interests, needs and goals. They are ephemeral groupings that transcend traditional demographic and social segmentations.

We must no longer think of target in the traditional way (men and women, 18 years or older, SEL ABC) because now our reach is much wider. The same woman may be watching a recipe video on YouTube, returning from her CrossFit class, taking part in a fashion blog, looking at pages on Facebook about abandoned animals and watching a horror movie.

For these **new** consumers, the difference between online and offline no longer exists. In their mind, these are just ways of receiving information, and today information is all they long for. For years, marketing focused its efforts on three great moments: stimulus (the communication per se, how to attract consumers to the store, or how to make them think of one brand over another), shelf (the moment of purchase where everything can change and a game that was virtually won can be lost), and experience (the experience that generates repurchase: did consumers like my product? Did they have a good experience with it?).

In this new world, these three marketing moments can take place in the digital environment, much faster and with the potential for much wider dissemination: brands can instantly see their content being shared by thousands of people, as well as the online shopping experience and experience with the product. And this can happen as a result of both a positive experience and a negative experience. Thus, each consumer becomes a potential brand advocate or detractor and, in the online environment, this can have unimaginable effects.

Furthermore, with the advent of new media, a new moment entered consumers' purchase journey, a moment between stimulus and purchase, where they will research, analyze reviews, watch videos. And how will they do that?! Online, of course. This moment is called by Google "Zero Moment of Truth." From now on, consumers increase their range of search, which a few years ago was limited to a conversation with friends and relatives, and start to read reviews from other consumers who have had experience with the product, watch related videos, search complaint websites, and research price, offers, and information. Everything is now an endless search for information.

That's why this moment has become so important, because the time these consumers spend with the brands is much longer in the online universe than the time they effectively spend at the point of sale.

In times of crisis like the one we are experiencing, this becomes even more relevant: consumers cannot afford to make a wrong purchase and waste their money. Value for money then becomes vital to consumers who, in order to ensure they are making the best deal, will spare no efforts researching. This new omnichannel consumer is the immediate future that brands should try to understand. What do they like? How much time do they spend on the internet? How do they relate to new technologies?

In order to understand this new consumer, first of all, we must demystify the internet concept. The internet is not a medium but a set of media that have extended into the widespread media and allowed total control of information by users. Facebook with its videos and posts, Instagram with its photos, Snapchat with its videos that disappear after 24 hours, Twitter with its 140 characters etc.

A study by Millward Brown (2016a) called *AdReaction*: Video creative in a digital world, showed that consumers are spending more time on their smartphones and tablets, accessing the internet through them, than watching television, for example (Figure 4).



Figure 4 – Time versus means of internet access

How often do we watch the soap opera on television, read about a recipe on the tablet on a cooking website while chatting online with friends on the cellphone? This is multiscreen, it means to be connected on all platforms at the same time, without losing focus or attention.

The same study by Millward Brown (2016a) shows us that people watch 240 minutes of videos per day, especially when they are home (since the Wi-Fi connection is not yet accessible to everyone). If it is a video on television they watch with family and friends; if it is an online video they tend to watch mostly alone – who doesn't want to be able to laugh at a video by *Porta dos Fundos* without being judged? (Figure 5).

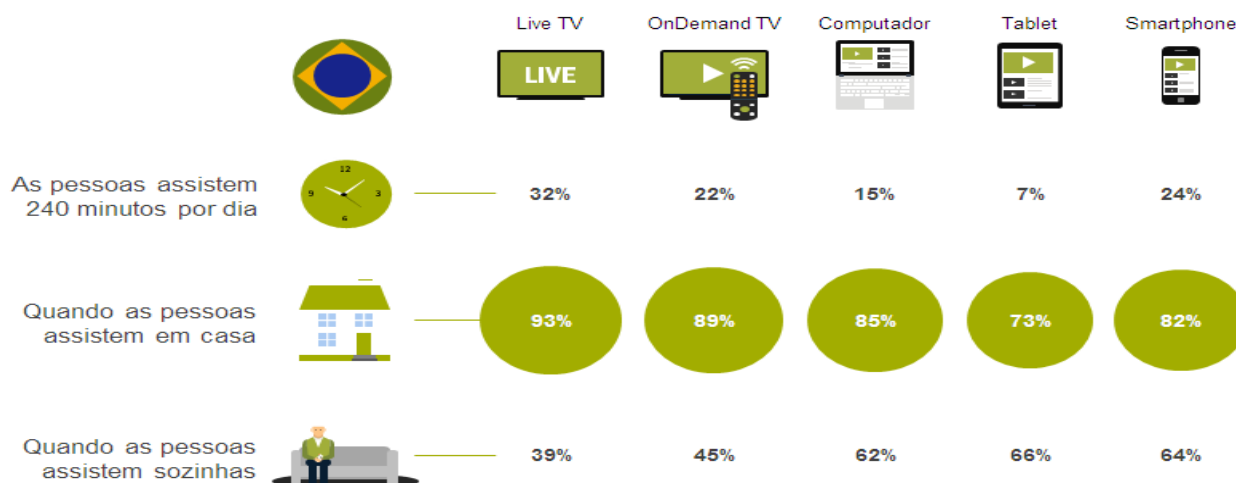


Figure 5 – Where and how people most watch videos

Thinking about this familiarity that new consumers have with online platforms, including videos, how can digital advertising compete in this universe? First of all, it is important to consider that because the digital world is so vast, consumers are not always interested or want to be swarmed by brand ads: someone who is researching the best price for a specific product has different intentions and motives than someone who is spending time on Facebook or Instagram, for instance. The digital world allows users to have full control: they choose their own routes based on their mood, their goals and whatever else is going on in their mind in that moment. With that in mind, the potential to harass someone online must be taken very seriously, since this is a private world (each individual has his own, taking into account his preferences, aspirations, motives), and any kind of disruption might be considered invasion or threat that must be repelled.

Still according to Millward Brown's study (2016a), receptivity to online video ads varies according to the format: watching a video and getting some sort of reward in the end (66% – earning points in

an online game, for example), click-to-play videos (49%), or even skippable pre-rolls (48%) are preferred by consumers. That is, again we see that control is very important to the modern individual, and that he wants to be in charge, especially when it comes to advertising. It is therefore important to consider a few points:

- Don't fall into a trap thinking that everyone is desperate to hear what you have to say;
- Don't believe that someone who "likes" your brand on social media will recommend you to friends and relatives;
- Don't take too long to tell your message – this consumer is fast and nothing can guarantee that he will watch the video to the end, even if the content is something really engaging for him.

With people spending so much time in the digital world, the biggest challenge for advertisers is to be as effective in these media as they are in traditional media, yet without being intrusive. We can no longer think that investing in the online should be done with the leftover money from the TV investment.

Online media should be part of the media plan from the beginning, in a structured and consistent manner, considering the type of media and how to get a certain message across to a particular audience, even if it means adapting the communication format to each medium. That is, the receptivity of an ad is related to its effectiveness, but not just that. High receptivity makes advertisers' job easier, but overall effectiveness (the sum of the effects of content across contexts) still needs to be measured for individual campaigns, and in order to maximize the chances of success of an online video creative, it is important to think of three pillars: right person, right context and right content.

It is also important to emphasize that the target based on interests, category, or brand make all the difference in your video receptivity; online video formats that offer rewards or control (skippable, click-to-play) are preferred, so it is best to use them whenever possible; skippable formats are a creative challenge that is worth considering to impact the audience at the beginning of the video.

### **3 THE BEHAVIOR OF THE AUTOMOTIVE CONSUMER IN A NEW ERA**

As we have just seen, consumer behavior has changed. New technologies allow consumers to have much more control of their purchase. The purchase journey has changed and now it is up to us to keep up, or we will be left behind. In the automotive sector, where decision-making involves a number of factors, this is even more important.

The decision-making process of buying a car has never been easy or fast, since it involves both rational (such as price, powerful engine, standard features, extras) as well as emotional issues (how will I be perceived driving this car? Will my friends and family approve of my choice? What does this car say about me? Is white the color of cabs in Sao Paulo?).

Thinking about this process, we carried out a brief survey to understand the decision-making process to buy a car, and the answer was something that we already expected, given the scenario presented in the article: consumers consider the internet an essential or very important tool when buying a car. They claim that their decision-making journey begins with the search on brands' websites or specialized websites. That is, Google's Zero Moment of Truth is really crucial in this category. After getting information online, it's time to collect information from friends and family, and get ready to visit the dealership.

If we look back 15 years in time, the time of the attack on the Twin Towers, we will remember that we did not have half the tools we have today to carry out this quest. Back then, we had the option to buy specialized magazines and read the test drive review written by journalists, buy the newspaper and read the automobile section, talk to a trusted mechanic, discuss with friends at the bar, and visit the dealership to check for standard features, extras, lower price, etc. Today things have changed, consumers are in control and no longer depend only on the opinion of journalists, mechanics and friends, now they are in charge and can get information from other consumers, read reviews on positive and negative experiences with the car, visit the brand's website and build their own car,

download the Fipe Table (Fundação Instituto de Pesquisas Econômicas - The Institute of Economic Research Foundation), cross reviews, select the best options and visit the dealership with the price list, extras and items that they will negotiate. If we think of Porter's five forces, we will see that the bargaining power of buyers in this industry is far greater than that of vendors (in this case, car manufacturers).

With that in mind, automobile companies should be more and more aware of their new consumers behavior and prepare for it, for example, by creating relevant content on their websites and understanding what consumers want to know before, during and after buying a car. What are consumers' main questions? What would they like to know not only about the brand, but also about the category? Any relevant test? Any news that deserves to be shared in content form and that will be shared by this user? This new consumer has the power of information by his side and conducts active searches to form his own opinion and decide on the purchase. If before the car test results on the magazine and the salesperson's speech could decide the purchase, today they are only two of the many factors that will be considered.

In this scenario, what have companies concretely done to stimulate their consumer? Next, we will see a Volkswagen case in the digital universe.

#### **4 VOLKSWAGEN**

For years Volkswagen has been investing in this new consumer. In the last Motor Show, for instance, the brand carried out a World Cup-related action. Official sponsor of the Brazilian soccer team, Volkswagen was distributing, in its stand, the VW Ball with the CBF logo. However, in order to win the ball, you had to be logged in: the call-to-action was activated by the carmaker's Facebook page and said "call your friend at the Motor Show and tell him to appear live inside the new Beetle." The first ten people won the ball. In addition, the brand's stand had a 360-degree camera that could be installed in any Volkswagen car and broadcast the live images to consumers who could not make it to the Motor Show, showing the entire vehicle interior, besides the audio of whoever was inside the car commenting in real time. This allowed consumers to learn about the news without having to pay for the tickets. The results were very good: 35 thousand people accessed the link to watch the live broadcasts and, on average, watched the program for 3.5 minutes.

In addition to this specific action, the brand invests in an increasingly modern website, which allows consumers to build any of the brand's cars, with all accessories, whether standard or optional.

Another important action by the brand was the launch of up! TSI that, among other platforms, was also conducted on Snapchat. Volkswagen was the pioneer in presenting a new car through the fast-video social media, which is spreading throughout the country. Present on virtually every social media, the brand started using Snapchat to get close to the young target, showing the innovations in technology and TSI differentials.

But to think about this omnichannel consumer, does not mean to only think about actions on social media or on the internet. These consumers want products that increasingly enable this interface on all media.

With that in mind, Volkswagen launched App Connect and Composition Touch this year. These two systems that are present in some of the brand's cars allow users to connect their cellphone to the car. The car dashboard becomes a SmartTV where consumers can access internet search engines, make or answer phone calls, send messages using voice command, check schedules, and access apps such as Spotify. With this product, the brand shows that it is thinking about its consumers and helping them stay connected for more hours during the day (Figure 6).



Figure 6 – Apps offered by Volkswagen

## 5 DON'T MISS THE DIGITAL TROLLEY

Consumer behavior has evolved a lot in recent years. The purchase journey has become agnostic, that is, it can start from any medium, and in this scenario, the digital world now plays an essential role in this consumer's life. The abundance of new technologies allows them to search for content and products anytime, anywhere (consumers can research the price of a sneaker on various websites inside a physical store, for example).

The study conducted by Millward Brown (2016a) confirms a fact that many of us already anticipated: multiscreen users spend more than half (52%) of their time on mobile screens. This time only tends to increase as smartphones will have increasingly faster connection speeds, making it easier for consumers in many ways. They will be able to watch high quality videos anywhere, download relevant content and find information in the most diverse sources virtually instantaneously. That is, in this new world we cannot, in any way, despise the digital media.

When we talk about digital media, we are referring to an extensive range of opportunities that the online network offers us. We can no longer think that digital is a single large and untapped block in which to invest. For consumers, they are different media that deliver content and provide different experiences. In this scenario, we have social media, search, online videos, music streaming services, online games and a myriad of other formats that deliver content, whether in text, images or videos. Consumers will access this content in different ways and in different moments of the day, whether on the PC, tablet or smartphone. The consumer working on his PC, for example, is in a different moment of attention from the young man who is looking at his Facebook via smartphone.

Brands need to consider this when designing their campaigns: the ad will not work the same way in such distinct moments of media consumption. Even if the message is the same (and it should be), the context in which each medium is inserted requires the content to be explored differently. It cannot seem intrusive in the digital world, since many people go online to have fun and just pass the time, not to be swarmed by ads and brands. Consumers are not always willing to engage with these communications, even if they allow for greater interaction with the user. However, it is necessary to be there, even if there is no immediate interaction. The lack of interaction does not mean that the brand did not generate any impact or that it made that consumer a little more predisposed to consume it.

We must bear in mind that today the media mix is not just the traditional package: TV, magazines, Radio, OOH, online and mobile. Content for online videos, news and information websites, content-specific websites, social media, online gaming, online retail, review and search platforms are all different elements within the new media mix.

Therefore, content marketing will be a major focus on 2016's corporate agenda. In a prediction released by Millward Brown (2016b), Jane Ostler – Media and Digital Director in the UK, explains why this is important:



Brands will become multimedia content creators, and there's a rapidly emerging ecosystem to support them, including advertising agencies, and social media platforms like Tumblr and Snapchat. Relevant and engaging content can go well beyond the well-known forms of marketing. The potential for engaging with consumers in real time is enormous. But content marketing is different from mass marketing – it's targeted, with small coverage, and it thoroughly explores a particular topic. To succeed with content marketing, you need to offer something tangible. Brands that tell stories that capture the attention will attract audiences as long as the content is suitable for the brand. In order to be authentic and compelling on a publisher's platform, the advertising brand will need to fit in the same context as the vehicle.

That is, the world has definitely changed. Every decade we see faster and fiercer changes, not only in consumer behavior, but also in social dynamics and relationships. If, 70 years ago, we were facing a war that devastated half of the Western world, today we have internal conflicts related to spirituality, food and the way we face this new world. We cannot lag behind and miss this trolley, because soon things will change again and those who don't keep up with the changes will stay out of the game for good.

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