
Global Market Bias: Part 1

A Series of Studies on Visual and Brand Language Around the World

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The Global Market Bias Research Series.

A collaboration among Cheskin,
MSI-ITM and CMCD Visual
Symbols Library.

Bringing together:

- Cheskin's strong experience in understanding cultures
- MSI-ITM's global online research community
- CMCD's Visual Symbols Library with a vast library of images

We can quickly ascertain and interpret various viewpoints across the world.

Introduction: The Global Market Bias Research Series

The Global Market Bias research project is a series of studies examining visual and brand language around the world. It is a collaboration among three companies with strong credentials in global marketing, branding, and design—bringing together cultural expertise from Cheskin, the global online research community from MSI-ITM, and the vast CMCD Visual Symbols Library.

In our collective 93 years of experience with companies and cultures the world over, we've developed an appreciation for the differences between people — differences rooted in age, gender, and culture. Yet, with increasing globalization, we can't help but wonder: in spite of historical cultural beliefs, are people starting to see the world in a somewhat uniform way? Might a global visual language be developing? To find out, we launched a multi-part research series to consider how similar (or not) we really are.

Our first installment explores the associations various regions make with color. Subsequent studies, already under way, will delve into the viability of non-celebrity spokespeople of varying cultural backgrounds, and the degree of brand elasticity around the globe.

Why Explore Color?

People associate colors with emotions, products, companies, and even countries. Choosing appropriate and inspiring colors is especially critical when dealing with multicultural markets. In some cases, global brands have successfully created universal color associations. Coca-Cola is red, no matter where you go. But in other cases, there are vast differences in what colors mean to people. Certainly, studies on color abound. In fact, 50 years ago, Louis Cheskin published *"The Color Guide for Marketing Media"* and wrote *"Colors: What They Can Do For You"* prior to that. So, looking forward while looking back, we embark on a new color study.

Study Methodology

An online survey reaching 17 countries obtained 12,929 interviews, the largest geographically balanced study on color to date. In order to qualify, respondents could not be colorblind. Online interviews were conducted from June 28, 2004 to July 9, 2004, using PlanetPanel, a proprietary global community developed and managed by MSI-ITM. The countries participating in this study included: Australia, Belgium, Brazil, Canada, China, France, Germany, Italy, Japan, Korea, Mexico, the Netherlands, Russia, Sweden, Spain, United Kingdom, and United States.

The online survey first asked respondents to pick a favorite color, then continued by focusing on eight colors — red, blue, green, purple, orange, yellow, black, and white. Participants were asked to rate the colors in terms of their association with certain attributes, products, companies, and countries.



Black is the New *(Red, White and)* Blue

To most of the world, the United States is best represented by the red, white and blue hues of its flag, “Old Glory”. But people from a variety of countries think of America as black, a shade associated with anger, aggression and big lumps of coal. France in particular takes a “noir” view, with 34 percent of French respondents seeing the U.S. as black. The French are not alone as 31 percent of Swedes, 29 percent of Brazilians, 27 percent of Russians and 24 percent of Germans all take a dim view of America. This is in strong contrast to American respondents’ vision of themselves - only 4 percent associate their country with black.

When did the USA become the proxy for all things destructive—the Kali of the color wheel? Critics may say it has something to do with the American habit of blundering into other countries’ politics. Chances are it’s not attributable to a chic Prada-embracing lifestyle. Still, can anything change the mindset in Brazil and France?

Perhaps the U.S. can borrow some goodwill from the color yellow. Yellow signals sun, happiness, and warmth. It makes people feel energetic, hopeful and cheery. And, according to international trendsetter, Oprah, yellow is “in.” (The U.S. could learn a lot from Oprah — she manages to be rich, powerful *and* well-respected.)

Americans need to go golden. It might just convince France and Brazil to lighten up.



Country Colors

Color Associations with Countries

The colors of a flag often set the tone for how people view a country, color-wise. But not always. Just take a look at the array below. Color associations vary, both internally among citizens, and compared to everyone else. What colors does your country fly under?



Australia		Everyone Else
Yellow	74%	32%
Green	72%	34%
Blue	50%	34%
Red	35%	26%



Belgium		Everyone Else
Red	78%	34%
Black	76%	24%
Yellow	70%	30%
Green	10%	10%
Orange	6%	19%



France		Everyone Else
Blue	91%	62%
Red	53%	46%
White	48%	40%
Green	10%	15%



Germany		Everyone Else
Black	75%	61%
Red	66%	35%
Yellow	56%	31%
Green	13%	19%
Orange	2%	14%



Italy		Everyone Else
Green	68%	57%
Blue	39%	25%
Red	32%	53%
White	23%	35%



Netherlands		Everyone Else
Orange	78%	49%
Blue	49%	24%
Red	42%	18%
White	39%	25%
Green	10%	23%



Russia		Everyone Else
Red	71%	65%
Blue	61%	14%
White	57%	34%
Green	30%	4%
Black	13%	22%



Spain		Everyone Else
Red	89%	68%
Yellow	71%	45%
Blue	16%	8%
Green	15%	15%
Orange	8%	22%

Country Colors



Brazil		Everyone Else	
Green	95%	58%	
Yellow	83%	53%	
Blue	64%	11%	
White	47%	6%	
Red	9%	23%	



Canada		Everyone Else	
Red	95%	57%	
White	68%	52%	
Green	24%	28%	
Blue	16%	13%	



China		Everyone Else	
Red	89%	69%	
Yellow	11%	40%	
Orange	4%	9%	
Blue	4%	2%	
Black	4%	11%	



Japan		Everyone Else	
Red	64%	72%	
White	42%	52%	
Green	14%	3%	
Blue	12%	3%	
Black	5%	13%	



Korea		Everyone Else	
Red	58%	61%	
White	56%	34%	
Blue	45%	10%	
Black	12%	16%	
Yellow	3%	22%	



Mexico		Everyone Else	
Green	95%	41%	
Red	80%	51%	
White	70%	13%	
Yellow	5%	34%	
Orange	2%	33%	



Sweden		Everyone Else	
Blue	94%	46%	
Yellow	90%	40%	
Green	28%	15%	
White	8%	36%	



United Kingdom		Everyone Else	
Green	15%	15%	
Black	5%	13%	
Purple	2%	7%	
Yellow	2%	7%	



United States		Everyone Else	
Red	89%	63%	
White	83%	49%	
Blue	88%	88%	
Black	4%	20%	

Brands:

A Color Report Card

Billions of dollars are spent on the development of corporate and product brand identities that appear around the world in advertising, point of sale, packaging, merchandising and sponsorship. Color is an integral part of brand identity, yet different cultures see colors different ways. With that in mind, we wondered how tightly brands are connected with color, and if global brand marketers have successfully established brand colors worldwide.

Some of our findings are what we expected:

- BMW and Mercedes are black.
- Coca-Cola and Marlboro are red.
- McDonald's is yellow and red.
- MasterCard and Kodak are yellow and orange.
- Pepsi, Levi's, Microsoft and IBM are blue.



Brand Colors

Does Brand Identity or Product Form Drive Color Associations?

Some brands, though, are color fickle. For example, M&M's brand is defined by all colors with the exception of black and white. We know that candy in general is not necessarily color dominant, and neither is one of the category's major brands.

Which raises the question, are brand color associations driven by the identity or the product form? The Dannon brand color is white, the base color of yogurt. And for consumers, Levi's blue jeans equal a blue brand, the signature red tag notwithstanding.



Levi's is identified with blue rather than red, their brand identity color.

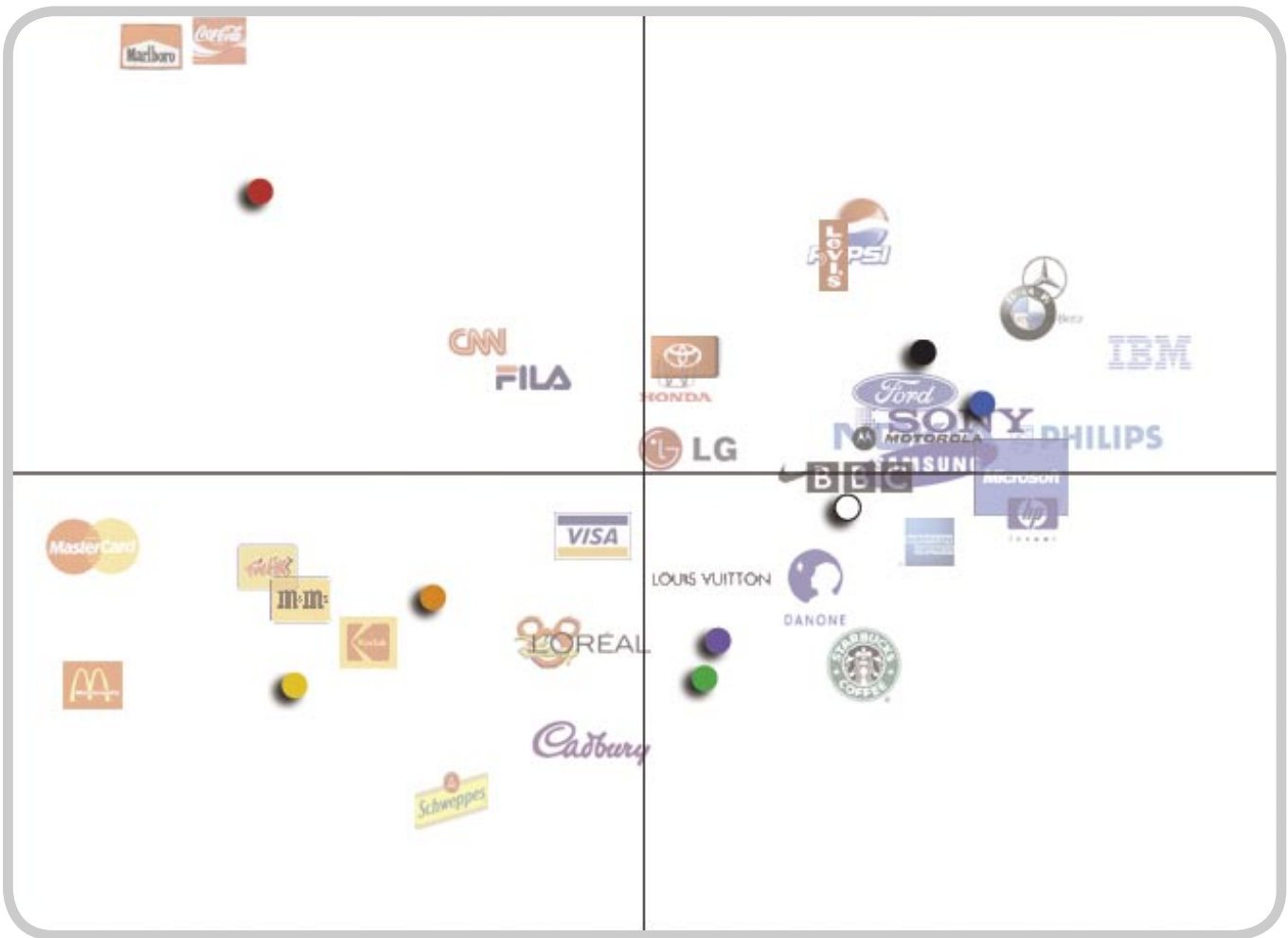


orange scores

In Latin America, orange says excitement. Both Mexican and Brazilian cultures are strongly influenced by fútbol and many teams in both countries have orange in their uniforms. Could it be that Latin Americans relate orange to the passion they feel when attending a match?

Brand Cluster Map

See How Brands Map With Colors Worldwide



Color Key

- Blue
- Purple
- Green
- Red
- Black
- Orange
- Yellow
- White

Tech Brands: Still Black and Blue

IBM and Microsoft have carved out blue, but they also have black overtones – the black and blue combination is inherent in technology and consumer electronics categories. In fact, virtually all other electronic and technology companies in our study are associated with black and blue, including Samsung, Philips, Motorola, Nokia and Sony.

American Express: Generation Gap?

Other brands are bipolar, color-wise. The most notable is American Express, which comes across as both green and blue, despite a predominantly blue identity. Older consumers perceive American Express as a blue company, while younger consumers are much more likely to paint it as both green and blue. Obviously the traditional green card and the newcomer blue card are appealing to different segments, though not necessarily as you might expect.



When Good Brands Go Colorblind

Then again, American Express is colorblind in Asia—there are few color associations with the brand in China, Japan or Korea. Other brands are colorblind, too. Around the globe, news organizations CNN and BBC are not associated with a specific color — perhaps the notion of impartial reporting works against strong color associations. Louis Vuitton, Nestle, Fila and Schweppes have very limited color associations as well.

Strong Brand, Strong Color Story

Our study shows that color associations with brands are fairly consistent around the world — the stronger the brand, the stronger the color definition. Coke will always be red, regardless of where you live. In regions where brands are not fully developed, color associations are fuzzier. Marlboro is red in every place but Asia, where the brand is less dominant. Color associations do vary by life stage: The younger you are, the redder Coke is. In contrast, the older you are, the more likely that you'll pick Marlboro as the dominant red brand.

What does all this mean for brand marketers? First, that the time and money invested in brand identity is well spent. Second, pay attention to the brand's color to attract global consumers.



blue's a crowd

Quick, how many blue brands can you think of? Too many, our study concludes. So many brands are linked to blue, it's obvious that the world's favorite color is, well, a little too popular. The lesson for marketers? Don't go blue if you're new.

Favorite Colors

Which Is Your Favorite Color? Every Country Says “Blue”

Canada	
Blue	41%
Purple	14%
Green	11%
Red	15%
Black	10%
Orange	4%
Yellow	4%
White	2%

United States	
Blue	42%
Purple	22%
Green	10%
Red	10%
Black	6%
Orange	4%
Yellow	5%
White	1%

Mexico	
Blue	43%
Purple	4%
Green	5%
Red	15%
Black	22%
Orange	3%
Yellow	5%
White	4%

Brazil	
Blue	44%
Purple	4%
Green	8%
Red	14%
Black	17%
Orange	3%
Yellow	4%
White	6%

Sweden	
Blue	36%
Purple	14%
Green	11%
Red	15%
Black	12%
Orange	4%
Yellow	5%
White	3%

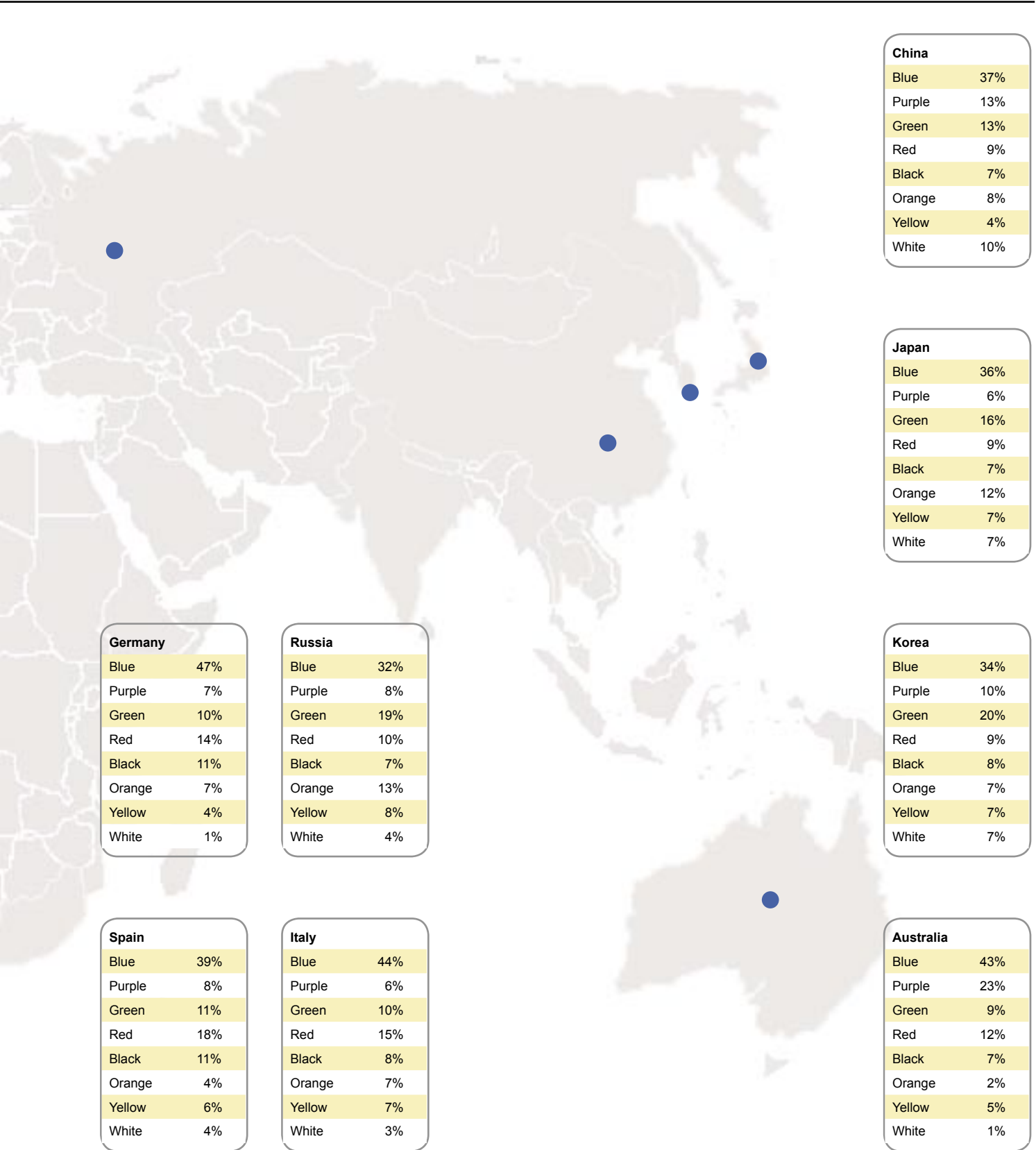
United Kingdom	
Blue	36%
Purple	21%
Green	10%
Red	14%
Black	8%
Orange	4%
Yellow	7%
White	1%

France	
Blue	40%
Purple	18%
Green	10%
Red	14%
Black	10%
Orange	3%
Yellow	4%
White	2%

Netherlands	
Blue	40%
Purple	11%
Green	7%
Red	21%
Black	11%
Orange	5%
Yellow	5%
White	1%

Belgium	
Blue	39%
Purple	15%
Green	6%
Red	15%
Black	12%
Orange	5%
Yellow	6%
White	1%

Favorite Colors





Colors: What You Say May Not Be What You See

When you talk with people about color and you want to be really clear, use the color yellow. Eighty-nine percent of our respondents see yellow as the same shade. On the other hand, when you say blue your likelihood of having people thinking of the same shade is about 50-50.

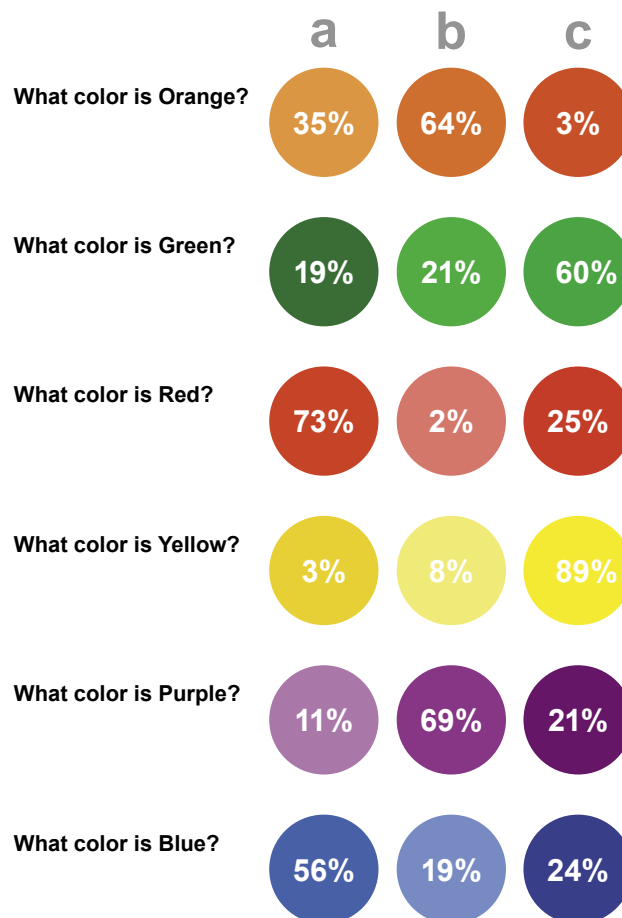
Based on people's context, their lives, their culture and physiology, people experience colors differently in words than they do when they see the specific color. This is why designers use color chips to make sure they mean the same thing. It is also why prototyping color is important to the process. We all see things differently in our mind's eye than others may.

So, at least, when you speak of color, if you can't use a prototype, use a chip and if you can't use a chip, use at least an adjective or two. Yellow may be bright yellow to almost everybody around the world but blue may be royal, navy or sky blues for starters.

Which color do you think of first?

In our study we asked all of our 12,929 respondents to select which shade of color is closest to the one they thought of first.

For each of the color groups below, which shade of color is closest to the one you think of first?



Purple: More Popular Than Ever

Blue may be the world's favorite color, but surprisingly, purple is the second most popular. And its popularity is growing, especially in English-speaking countries where 21 percent of people say purple is their favorite. Marketers are taking notice. Some are already picking up on purple in products, packaging, branding and advertising. Is purple right for your brand? Read on to learn more.

Purple Stirs Women's Souls

Women, more so than men, have had a preference for purple ever since Cleopatra's time. In fact, more than twice as many women than men consider purple their favorite. Women also attach stronger associations to purple. Men's positive associations are significantly weaker when it comes to qualities such as friendly, innovative, happy, exciting, strong, high quality, safe, love, hope and luck. Women feel purple's pull more passionately than men.

And Appeals to Mature Audiences

Just as women and men differ in their passion for purple, so too do women in different age groups. In English-speaking countries, 30 percent of women aged 25 to 44 choose purple

as their favorite color; many strongly associate it with royalty, quality, prestige, excitement, friendliness and other positive qualities. Younger women aged 18 to 24 associate purple with these attributes far less.

A Split Personality in Latin America

Latin America has strong feelings for purple. On the positive side, people in Mexico and Brazil see purple as representing strength and innovation. However, they also associate it with sadness, death, and cold. These associations may be related to the role purple plays in this region's religious practices.

Purple Rules, But No Brand Reigns

No brand owns purple around the world the way Coke owns red. Our study finds Cadbury has the strongest connection to purple in English-speaking countries. L'Oreal is highly associated with purple in Latin America and Europe, but the link is weaker in Asia. Purple, globally-speaking, may be up for grabs.

Is purple right for your brand? If you're trying to reach women, especially women in English-speaking regions, and you want to create powerful positive associations with your product or service, purple may be the best alternative to that over-used favorite, blue.



Asia: Sees Color in a Different Light

When it comes to color associations, Asia is indeed a complex palette.

With our color study, we wanted to understand what, if any universals there are in the way people think about color. Admittedly, this is a big and complex undertaking. Our intent was to playfully scratch the surface. In doing so, we uncovered some surprising findings about Asia.

We found there is more dissent than agreement within Asia as to what colors mean. The Chinese, Japanese, and Korean respondents were often strikingly at odds with each other, but in different ways. Japan and Korea took turns being more similar to China than to each other. And China, despite being a developing country, was sometimes more aligned with the Western countries, while Japan and Korea displayed unique color perspectives. When it comes to color, Asia is just not a homogeneous market.

From the red and gold of dragons to the white of geisha makeup to the saffron of monk's robes, color plays meaningful roles throughout Asia. And those meanings may be shifting or taking on new dimensions. We offer some intriguing glimpses on the following pages.

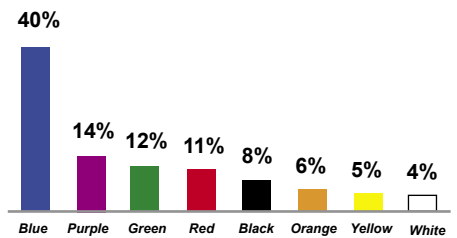
Blue: Many Facets

Blue is the world's favorite color.

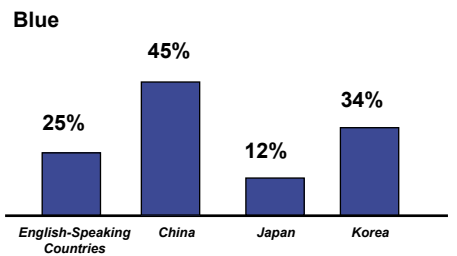
China, Japan, and Korea rate blue as their favorite color, but that's where the similarity ends. While most of the world finds blue a happy color, the Chinese aren't smiling. Rather, the Chinese think power and reliability. Technology comes foremost to mind when they think blue—PC's, cell phones, and appliances. In China, IBM is still blue. Over time, blue may have become the world's favorite color, but while it is strongly associated with high tech in one culture, blue might mean nature in another.

The Koreans think technology since they associate blue with Samsung, but their take is more about freshness and innovation. They strongly associate water with the color, suggesting perhaps a more fluid and dynamic association with technology. In Japan, unlike in China, blue is not a color associated with power or reliability. Rather, the Japanese agree with their Western counterparts that blue makes them feel sad.

Blue continues to be the universally "safe" color to use, but we see opportunities to play the Korean blues and push the color from safe and reliable to fresh and innovative.



Global favorite color.



The association of blue with power.



Blue evokes sadness in Japan.

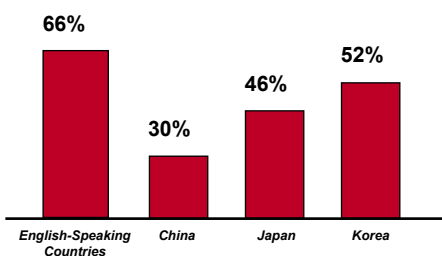
Red: Coke Today, Technology Tomorrow?

The Asians see red when they think of Coca-Cola. In this, the world is aligned. Red inspires strong feelings of excitement and danger. However, red stirs other emotions.

In China, red is all about power, prestige, and happiness. Red is the color of weddings, lucky money envelopes, and the Chinese New Year.

Koreans are unique in the world in their association of red with innovation and somewhat surprisingly, the company LG. Thus, while in China red evokes traditional images, Korea connects red to the future and technology. We see opportunities to play on two sides of red in Asia, taking into account the polarity of perceptions about the color.

Red



The association of red with Coca-Cola.

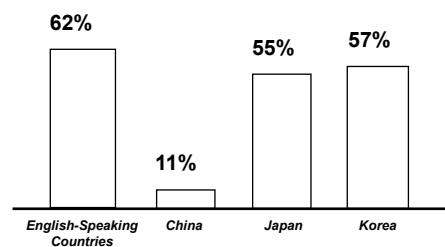
White: Not So Uniform in Asia

White is strongly associated with the notion of fresh throughout the world. This holds true in both Japan and Korea, which also highly rate the color white with prestige. Japan Airlines evokes strong connections to white across all the Asian countries.

Unlike the rest of the world and their Asian counterparts, Koreans don't seem to link white with appliances. While Koreans rate white high in freshness and prestige, they also find white weak and sad.

China is out of step with the rest of Asia and the world in that it rates white low in association with fresh and prestigious. Like the Koreans, the Chinese find white to be sad. White gifts are associated with funerals, and women don't wear white unless they are in deep mourning. Almost uniquely in the world, the Chinese associate white with water, the phrase "white water" meaning plain water.

White



The association of white with freshness.



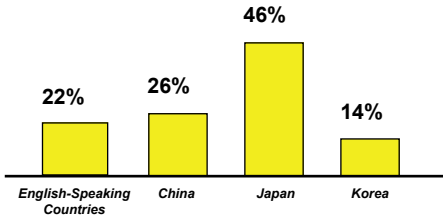
White is a funeral color in Korea and China.

natural inclination

While people in most regions of the world associate color with emotions, people in Asia connect color with nature. Does that mean Asians are more attuned to the natural world, or do they simply prefer to keep their emotions to themselves?

Asia Color

Yellow



Japan associates yellow with danger.

Yellow: Proceed With Caution

While yellow elicits strong associations from the rest of the world, the responses from Asia are mixed.

For instance, yellow is typically thought of as a happy color. However, this is not true in China. In China only 18 percent identified yellow with happy in comparison to 41 percent in Japan, 46 percent in Korea and 61 percent in the English speaking countries. Yellow shows a similar pattern in association with fresh. It has a strong association everywhere but in China.

In Japan, the highest association with yellow is danger: more than three times the response in Korea and almost twice as much as the rest of the world.

In Korea, the second highest association of yellow is weakness. This is unique to Korea with 41 percent. Other parts of the world may associate weakness with yellow but not nearly as strongly. Years ago in the United States, Louis Cheskin found that yellow flecks in detergent implied a weaker detergent than ones with blue or red flecks. The red was too strong and the blue was just right. Yellow, even when added to other colors, may still need to be used cautiously in Asia.



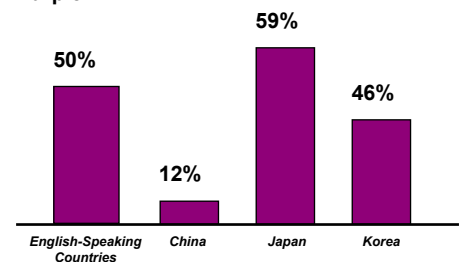
Purple: Reigns Everywhere but China

Purple is very strong in the English-speaking countries. While it has strength in Korea and Japan it has almost none in China. In China the highest rated attribute associated with purple is a mere 24 percent and most are much lower than this. This is in stark contrast, for instance, to green's association with being environmentally friendly in China, which is 98 percent.

We see China as an unfilled glass when it comes to purple. Like the English-speaking countries, China selected purple as the second favorite color, along with green.

But unlike the English-speaking countries it is not associated with a particular essence.

Purple



The association of purple with prestige.

Green: The Healthy Understudy

Green is the third most popular color around the world. Asians also agree with the rest of the world that green most readily brings to mind the idea of being environmentally friendly.

In China, that association is highest at 98 percent. The Chinese also associate green with fresh and power at a much higher rate than their Asian counterparts.

In addition to being environmentally friendly, the Koreans (but not the Japanese) associate green with reliability and high quality.

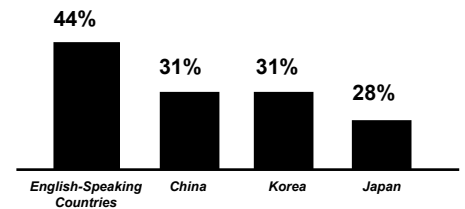
We see many interesting opportunities for the color green due to the strength of these positive associations and the dearth of companies that are connected with the color. We see an opportunity to play on the notion of fresh in China, given the low association of this attribute with white. Small kitchen appliances are showing up in retro shades of diner green. Could we possibly allow avocado to make a comeback in the kitchen or laundry? Don't let your intuition answer that question if you plan on selling in Korea. Stranger things have happened. There may indeed be an opportunity to play up green in association with household appliances in Korea, given white's low resonance in that area.

Black: Power, Technology

Black is associated consistently throughout Asia with high quality. Black also means power, but more so in English-speaking countries. However, black's association with technology is strongest in China, with people linking the color to their cell phones, PC's, and appliances.

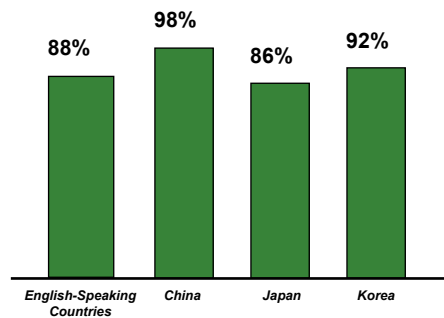
We also see this difference changing as China adopts more design-oriented technologies and moves away from a strict correlation between technology and professionalism. As kids begin to adopt technology more and the iPod finds its audience, will black's meaning change in China?

Black



The association of black with power.

Green



Green is associated with being friendly to the environment.



Will green appliances work in Asia?

Asia Color

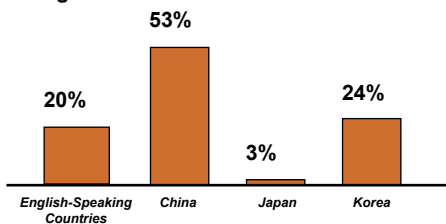
Orange: Underestimated

While it's only the sixth favorite color out of the eight tested, orange elicits strong associations in Asia. The Chinese tend to find orange related to power and prestige. But, unlike the rest of the world, the Chinese don't associate orange with environmentally friendly.

The Japanese like orange more than the rest of the world, ranking it higher on their list of favorites. In Japan, the correlation to fresh and health is the highest in the world. Interesting given the fact that orange juice is so expensive in that country! While about a third of everyone else in the world associates orange with danger, only nine percent of the Japanese do so. Instead, the Japanese also associate orange with hope and friendly.

Despite these varied and strong associations with attributes, there is no company that owns orange in Asia the same way Coca-Cola owns red. This is an interesting contrast to Europe where orange is commonly used in branding. There are clearly opportunities to play up orange in Asia.

Orange

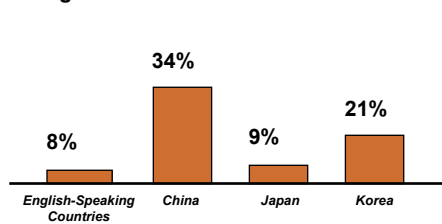


The association of orange with power.

Summary: The Asian Color Conundrum

In summary, color in Asia is a bit like a riddle wrapped inside a mystery – it pays to be circumspect when trying to figure out answers. Our findings suggest that Asian countries are as different from each other as they are from the rest of the world. Our coaching is not to take these findings and apply them wholesale. The risk is that you signal something unintended—purple cell phones or the wrong green in an appliance may be the kiss of death in Asia. Further research can minimize the risks — we encourage you to delve more deeply into specific cultures and categories, to make sure you approach them with clear and colorful communication.

Orange



The association of orange with prestige.

Red China, Reborn



While most countries feel tied to the colors emblazoned on their flags, they don't have to be. Nations that dare to break with history can create new possibilities by embracing a new visual identity. Color is a great place to start.

Australia did it. In 1984, Australian Governor-General Ninian Stevens chucked the British royal colors of red and blue, declaring instead that Australia's official colors would be green and gold, or to be precise, Pantone 116C and 348C. He gave the country a new look, and Australians apparently approved—nearly three-quarters of the Australians we polled identified green and gold as their national colors. Sure, their flag still bears the Union Jack and they sing “God Save the Queen” whenever the old gal's around, but for communications/PR purposes they have staked out a separate space. And made a very clear point: Australia is no longer English property. What's more, Mr. Stevens even declared the national colors “royalty-free” — officially assigning them to the public domain. (John Deere won't give away its green, but Australia does.)

As brand consultants, we can't help but admire this tactic. It is a bold and enterprising way of visually reinventing a country. It is exactly what we'd prescribe for China.

For more than a decade we have spent a lot of time in China: Beijing,

Guangzhou, Wuhan, and especially the cities of Shanghai and Zhengzhou. Shanghai, like San Francisco, is a city of early-adopters and progressive business practices. Zhengzhou, like Chicago and Manchester, is a significant and up and coming regional center that while behind its more cosmopolitan sister city, Shanghai, still offers cultural and commercial perspective invaluable to Western companies. Zhengzhou has a high-density urban population with two million urban residents and one of China's most important railway junctions. We recognize that, while provincial, this city still has a sophisticated population. We see in it the cultural superpower that China has been and is again becoming. We'd like to see China decked out in style with a new national color.

China would look great in a new hue. Blazing yellow. Brilliant magenta. Or perhaps imperial purple. The Chinese pick purple as one of their favorite colors. And while they don't currently associate purple with prestige, the rest of the world does. Chinese leaders would just need to decide and then make it so with careful execution. China would then have a powerful color worthy of a culture that created paper, gunpowder, and the zero (the zero!). Can you see it? The next cultural superpower dressed head to toe in eye-riveting plum, a color free from the baggage of historical context.

A color that 1.3 billion people have chosen to own.

The 2008 Olympics could be China's coming out party — heralded by firecrackers and feasting, rubber band acrobats, and silk banners painting the air above Beijing. What a brilliant way for the Chinese to thumb their noses at the stereotype of plodding farmers in gray Mao coats.

China has a chance to prove that the tiger can change its stripes. Let Russia have red.

love connection

Red is the universal color of love: hot, dangerous and exciting! But are there other colors that say “I love you?” That depends on where you live. In Asia, orange has the second highest love connection. In English-speaking countries, purple is the romantic runner-up, while in Brazil, Mexico and France, white speaks of romance. Yellow nearly equals red's heat in Spain. It seems the language of love has many nuances, no matter where in the world you are.

Summary & Authors

Summary: Cultural Nuances Abound

Our color study reinforces much of what is known about color, yet it highlights the fact that cultural influences still play a strong role in color preferences and associations.

Counter-intuition is called for when dealing with multiple cultures and

various life stages. As globalization increases and countries in the Middle East experience economic and political awakenings similar to China, companies will have an opportunity to use color in very interesting ways — in communications, branding, product development and design.

Understanding the color vocabulary across the world takes a consistent effort and a sustained curiosity about how and why perspectives are changing.



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