

# ADAPTIVE BRANDS

**An Ipsos webinar**

8<sup>th</sup> October 2020

Watch the  
recording of the  
webinar [here](#)

GAME CHANGERS



# AGENDA

## ADAPTIVE BRANDS

An Ipsos webinar

8<sup>th</sup> October 2020

GAME CHANGERS 

### INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organization

### WHAT'S NEW? A Round-up

Simon Atkinson

Chief Knowledge Officer

### ACHIEVING BRAND GROWTH IN A MINDFUL AND MINDLESS WORLD

Gillian Drewett

Global Head of Offer, Brand Health Tracking

### US ELECTION: THE CANDIDATES AS BRANDS

Chris Murphy

Global President, Brand & Market Strategy

Clifford Young

President, Public Affairs, Ipsos in the US

### SPOTLIGHT ON RUSSIA

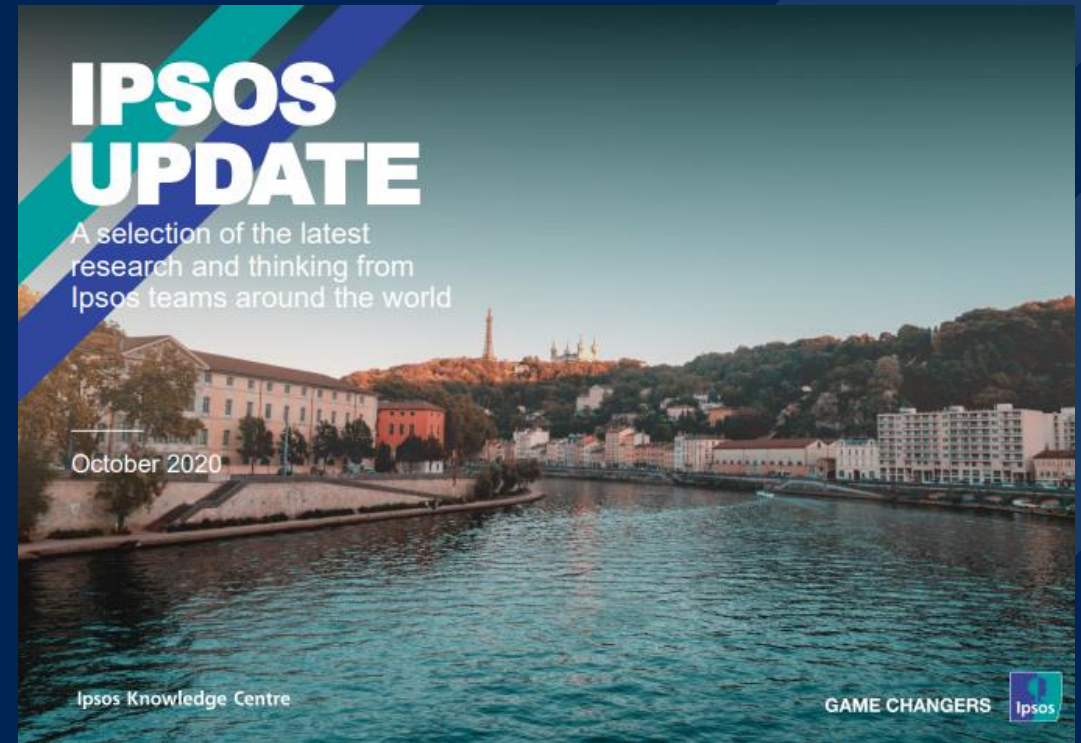
Mila Novichenkova

Head of Marketing & Communications, Ipsos in Russia

# WHAT'S NEW?

**Simon Atkinson**

Chief Knowledge Officer



**Download** latest edition of [Ipsos Update](#)



**Follow** the latest releases [@Ipsos](#)



# WHAT'S NOW: Coronavirus Latest

## 1 COVID-19: #1 concern 6th consecutive month

Unemployment  
worries rising



## 3 THE VACCINE QUESTION: 74% would get a vaccine if it were available

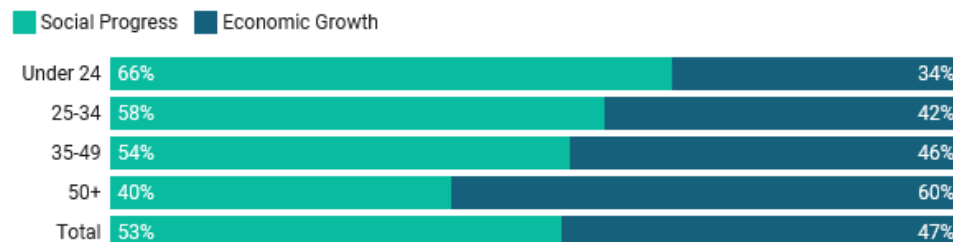


Vaccines video: P/word: ECECovidWatch2020

Blindsided: a pandemic-shaped recession  
(The story so far – based on our digital ethnography project)

## 2 AFTER COVID: People say they favour social progress over economic growth

Imagining when the Covid-19 pandemic is over...which  
should your country prioritise more?





# WHAT'S NEXT?

## 1 PAYMENT MATTERS

New report



## 2 NATIONS BRAND INDEX

The impact of Covid?

**Top 5:** nations people feel most comfortable visiting next 5 years:

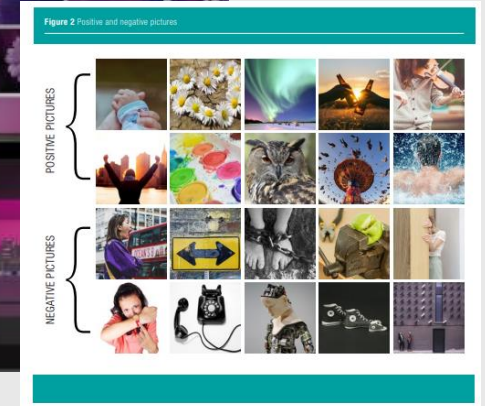


**Top 5:** “net negative” scores for health crisis management:



## 3 BRAND CHOICES

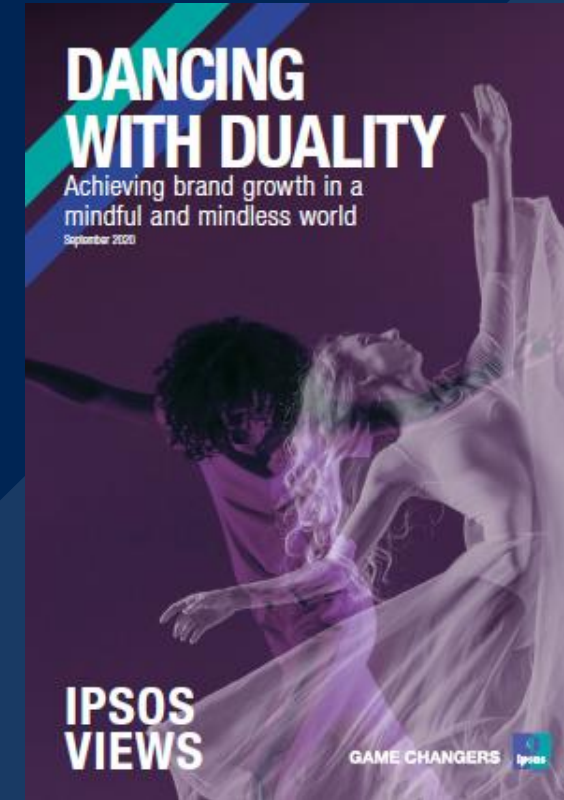
White Paper



# ADAPTIVE BRANDS

**Gillian Drewett**

Global Head of Offer,  
Brand Health Tracking



**Download** white paper: [English](#) [French](#) [Spanish](#)  
**Read more** in [Disrupting System 1 Thinking](#)  
**Listen** to the [Podcast](#)

# DANCING WITH DUALITY

Achieving brand growth in a mindless & mindful world

GAME CHANGERS





# MY DANCING WITH DUALITY HIGHLIGHTS REEL

People





---

## Brands that grow are chosen by...

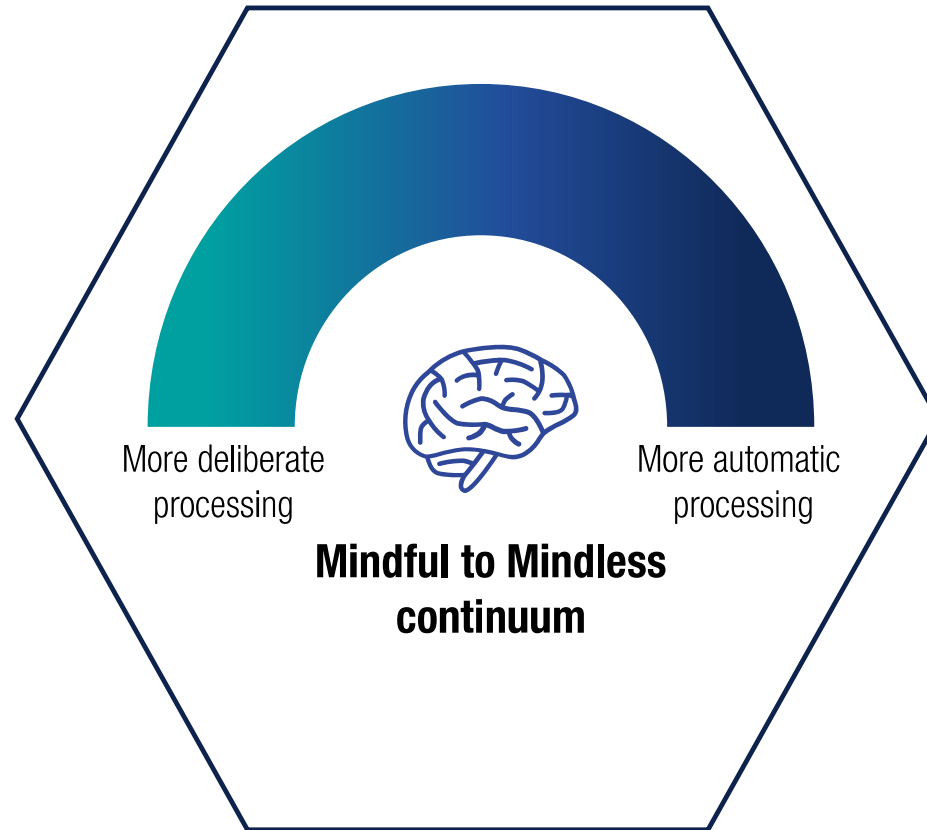
---



### THE SECRET TO BRAND GROWTH?

It hasn't changed, the secret to brand growth is a simple one: get **more people** buying, **more often** with the brand being **more easily** accessible.

# DESCRIBING DECISION-MAKING ONLY IN TERMS OF SYSTEM 1 & SYSTEM 2 IS A BIT TOO SIMPLE



**THE MINDFUL TO MINDLESS CONTINUUM**

How we choose products and brands is complex and nuanced, using more than a couple of systems. We as whole people are engaged with our decisions, and the choices we make in different contexts fall along a mindful to mindless continuum.



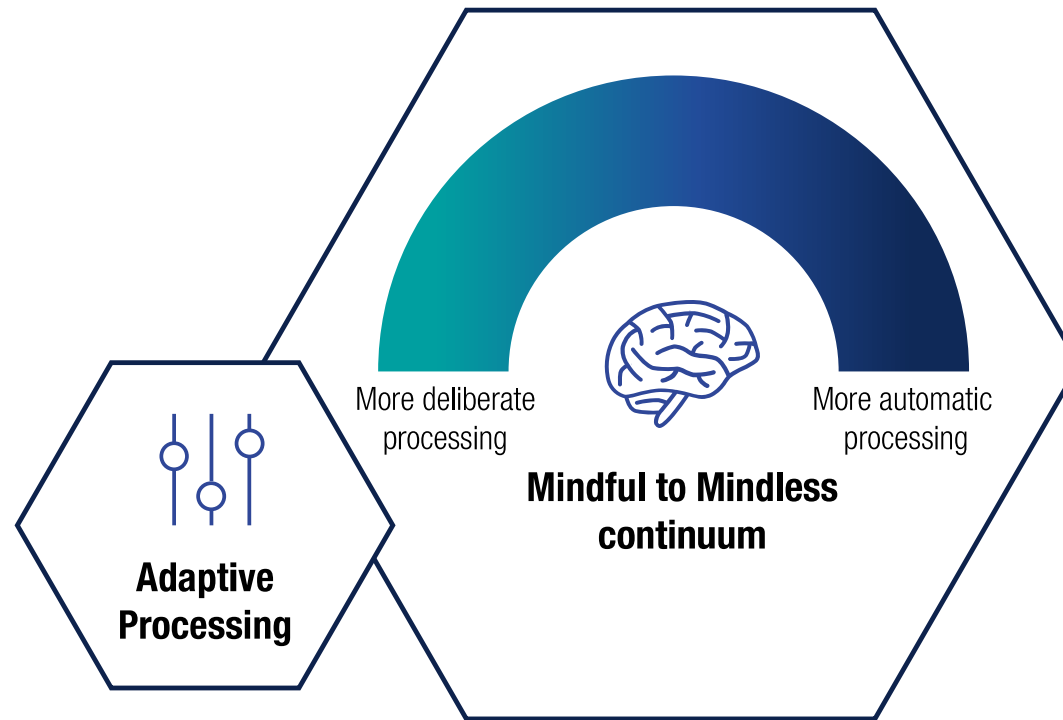
# MY DANCING WITH DUALITY HIGHLIGHTS REEL

People

Mindful/Mindless continuum



# DESCRIBING DECISION-MAKING ONLY IN TERMS OF SYSTEM 1 & SYSTEM 2 IS A BIT TOO SIMPLE



**THE MINDFUL TO MINDLESS CONTINUUM**

How we choose products and brands is complex and nuanced, using more than a couple of systems. We as whole people are engaged with our decisions, and the choices we make in different contexts fall along a mindful to mindless continuum.





---

**WE ADAPT OUR  
DECISIONS ACCORDING  
TO WHAT IS GOING ON  
AROUND US AND  
WITHIN US**

---



**CULTURE IS CRITICAL**

The internal and external context in which people operate shapes their beliefs, values and goals. These factors are dynamic, constantly changing, and can change the way people relate to or associate with a brand.



# MY DANCING WITH DUALITY HIGHLIGHTS REEL

People

Mindful/Mindless continuum

Adaptive decision makers

Context



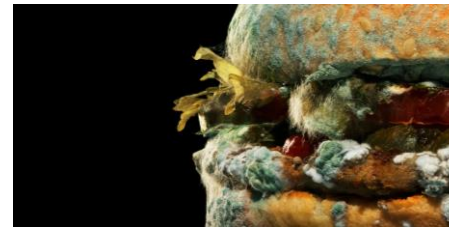


# DECISION MAKING IS A CONTINUUM, AND BRANDS NEED TO LEARN HOW TO INTERACT WITH US ON DIFFERENT LEVELS

Brands' interventions can shift our decision making from autopilot to being more deliberative

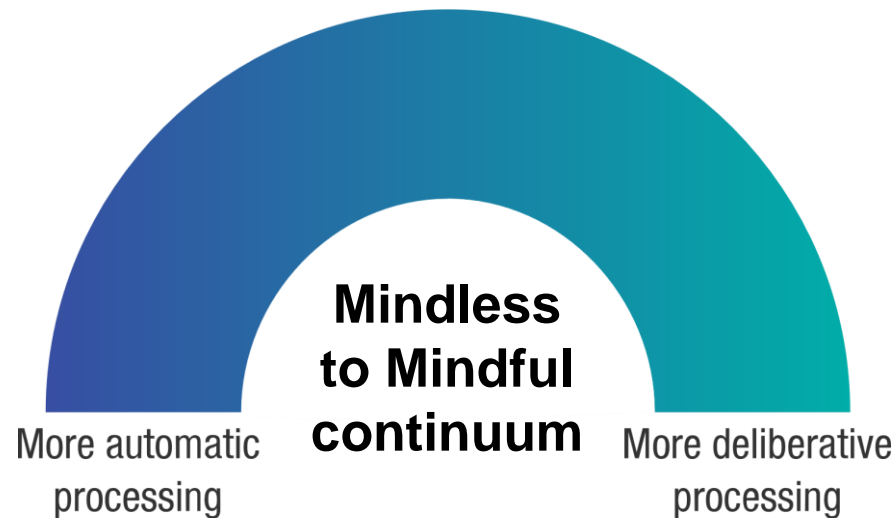
## DISRUPT

Design marketing interventions to disrupt automatic processing



## REINFORCE

Facilitate automated decision making



## JUSTIFY

Deliver arguments to justify deliberative choice



### STAGE AN INTERVENTION

Brands can stop consumers' mind-scrolling by designing interventions that make them pay attention, even for a second. Use this opportunity to reinforce or explain your key messages.



# MY DANCING WITH DUALITY HIGHLIGHTS REEL

1. People
2. Mindful/Mindless continuum
3. Adaptive decision makers
4. Context
5. Brand interventions



Understanding how to influence contextual choice, means marketers can ensure their brand shows up...

In the right places...In the right moments....And in the right way.....

to achieve sustainable brand growth

---



# ADAPTIVE BRANDS

## THE CANDIDATES AS BRANDS

**Chris Murphy**

Global President, Brand & Market Strategy

**Cliff Young**

President, Public Affairs, Ipsos in the US



**Explore** the latest polling numbers at the [Ipsos US](https://www.ipsos.com/US) site



**Follow Cliff** at [@CliffAYoung](https://twitter.com/CliffAYoung)



# BRAND BIDEN VS. BRAND TRUMP

What happens when we use the latest commercial brand measurement tools to assess Brand Biden and Brand Trump ?

GAME CHANGERS



# 3 KEY QUESTIONS

## Questions

What **equity** do the candidates have?

What **drives** preference for each candidate?

What perceptual spaces are **uniquely owned**?

- Personality
- Policy

## Approach

Application of the commercial brand measurement toolkit

Brand Value Creator (BVC)

Brand Mental Networks (BMN)

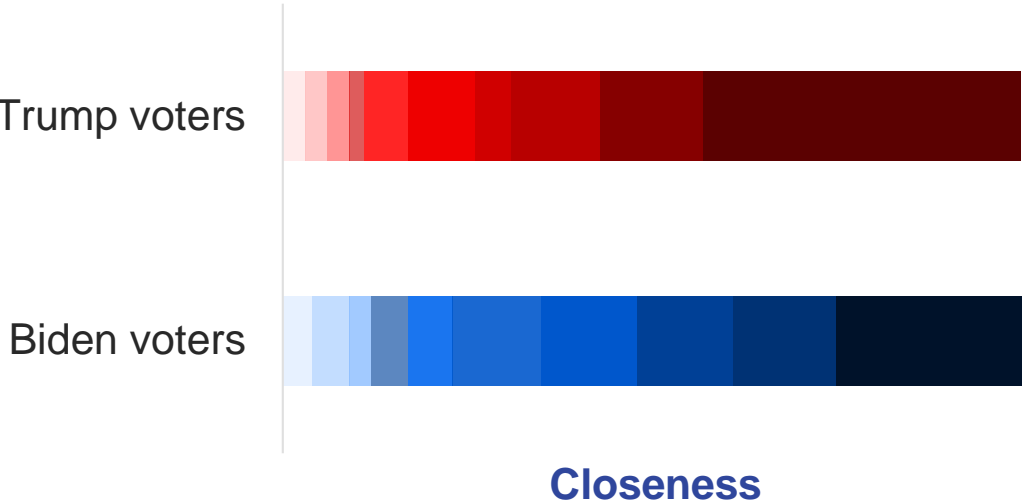
Brand Image with Response Time Capture (MCRT)



# BVC: BIDEN HAS A SMALL LEAD ON ATTITUDINAL EQUITY BUT TRUMP HAS STRONGER INTENSITY OF PREFERENCE, AS DEMOCRATS LONG FOR OBAMA

Attitudinal Equity      **TRUMP 47%**      **BIDEN 53%**

“On a 10 point scale, how close to you feel to each candidate?”



**43%...**  
of those likely to vote for Trump give him a top box score on Closeness.

...while just **26%** of those who plan to vote for Biden give him a top box score

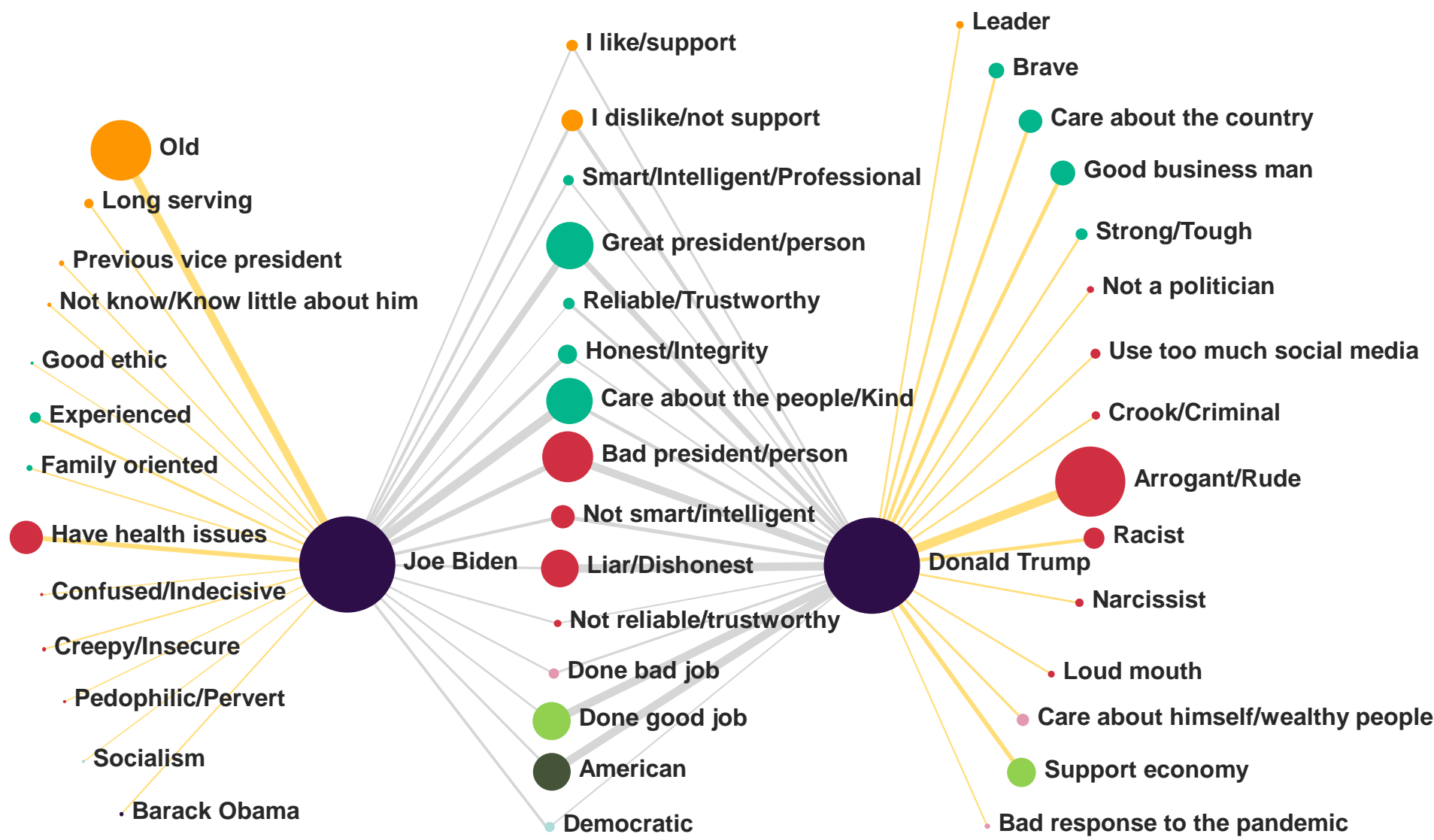
Which of the following public figures is your favorite?

	Democrat	Republican
Total	357	282
Donald Trump	2%	58%
Joe Biden	14%	1%
Barack Obama	62%	5%
Mike Pence	0%	7%
Bernie Sanders	9%	0%
George W. Bush	1%	14%
Kamala Harris	7%	1%
None of above	5%	10%



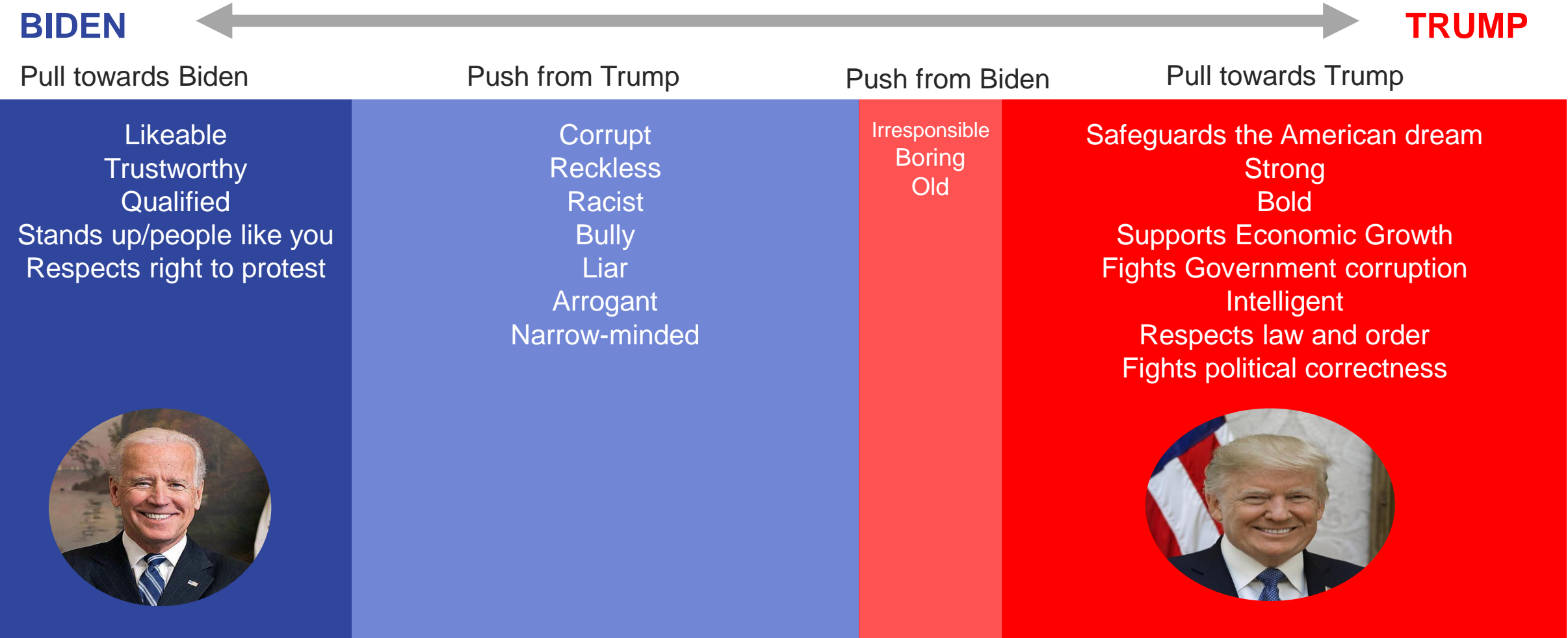
# BRAND MENTAL NETWORKS – DONALD TRUMP VS. JOE BIDEN

Personality - Positives	
General	
Personality - Negatives	
Contribution/Objective – Positives	
Party/Ideology	
Name of Politician	



# USING SPEED-BASED TECHNIQUES TO UNDERSTAND WHAT DRIVES VOTER SELECTION

## Biden vs Trump: A Story of Attraction and Repulsion

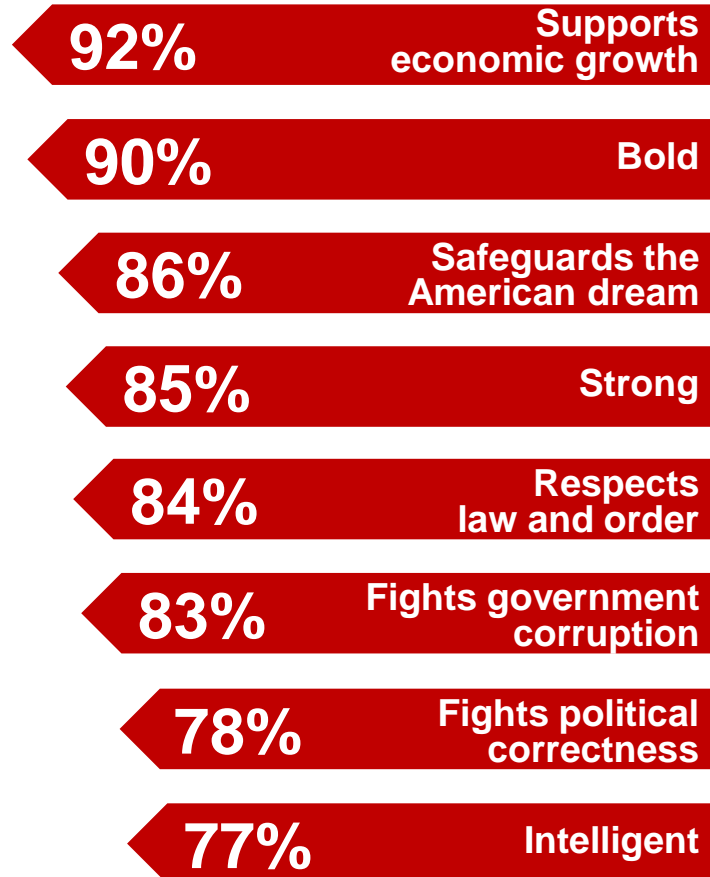


IMPACT ON CHOICE

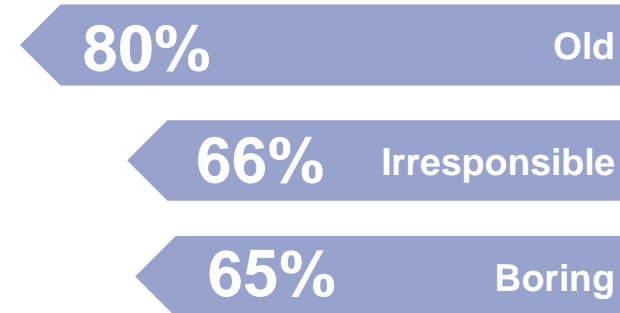
# “SHY” TRUMP VOTERS?

Trump’s base is highly enthusiastic. His voters are much more driven by ‘Trump positives’ than “Biden negatives”

Of those **pulled** to Trump,  
he is seen as...



Of those **pushed** from Biden, he  
is seen as...



# BIDEN IS NO OBAMA. MANY ARE PUSHED HIS WAY BY DISTASTE FOR TRUMP.

Biden has meaningful positives, but they are more muted

Those *pushed* from Trump  
see him as...



Arrogant 97%

Bully 96%

Reckless 96%

Liar 95%

Corrupt 94%

Racist 92%

Narrow-minded 91%

Those *pulled* to Biden see  
him as...



Qualified 76%

Respects right  
to protest 71%

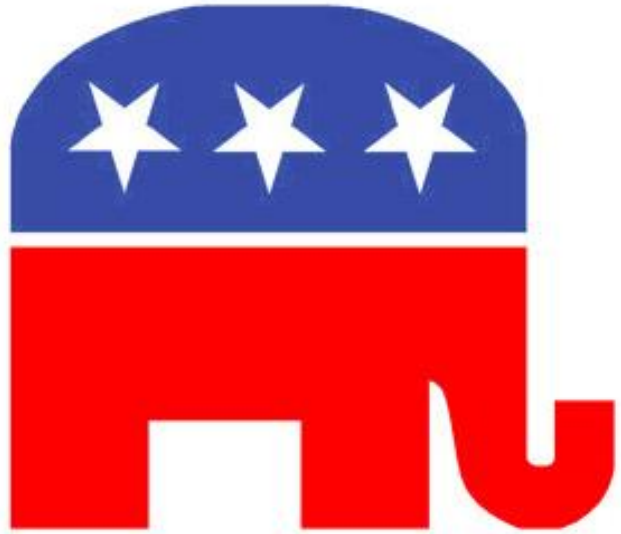
Likeable 67%

Stands up for  
people like you 66%

Trustworthy 65%



# HOW DO YOU PLAN TO VOTE?



**65%**

**of Republicans plan to vote  
in person**



**57%**

**of Democrats plan to vote  
by absentee ballot or mail**

# RECAP: IN MANY WAYS, THE ELECTION IS ALL ABOUT TRUMP

## BRAND BIDEN



Biden has a modest equity advantage.

His supporters may be motivated to action by negative Trump associations - but “negative avoidance” is risky

Vulnerabilities could discourage participation:

- Brand Biden is perceptually non-descript
- Lack of intense support amongst those who favor him
- Extreme fondness for the past

To ensure conversion from preference to action, Biden needs to build upon his positive associations as antidotes to Trump negatives: **qualified, likeable, trustworthy.**

## BRAND TRUMP



The comparative intensity of the Trump voter...

..combined with their willingness to venture to the polls...

..could yield another poll-defying November result.

But the intensity of Trump detractors could more than counter-balance the enthusiastic participation of Trump voters

To broaden his appeal among the small group of persuadable voters, he will need to appeal to their **economic sensibilities**

# ADAPTIVE BRANDS

## RUSSIA SPOTLIGHT

**Mila Novichenkova**

Head of Marketing & Communications,  
Ipsos in Russia

### Trend Vision 2020 Russia

The world is trying to understand the impact caused by the global COVID-19 pandemic. Uncertainty remains. We do not yet know if there will be a second wave or further consequences, and what our "new reality" will ultimately be.

In this issue of the annual Trend Vision report we talk about trends, signals of change and how to analyze them, in order to make the future, in which this crisis is not the last one, to be not a frightening «black box», but a platform for exciting experiments for successful brands and companies focused on long-term sustainability.

© Ipsos | Trend Vision 2020: Russia



A CRISIS LIKE  
NO OTHER,  
  
AN UNCERTAIN  
RECOVERY

International Monetary Fund.  
World Economic Outlook, June 24<sup>th</sup> 2020



**Download** Russia [Trendvision](#) report  
**Explore** [Ipsos Global Trends 2020](#)



# RUSSIA IN THE SPOTLIGHT

**Mila Novichenkova**  
**Head of MarCom,**  
**Ipsos in Russia**



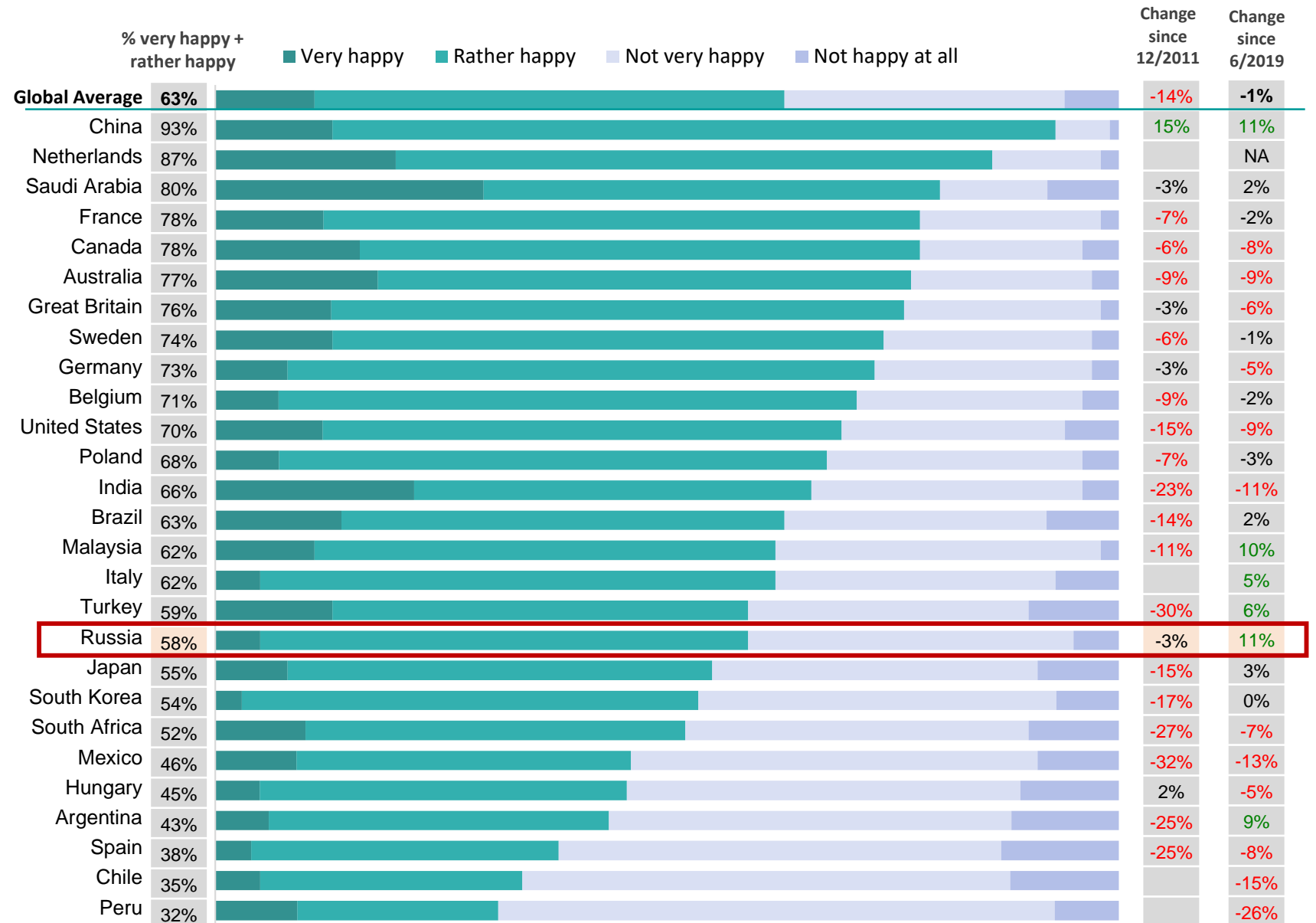
**GAME CHANGERS**





# HAPPIER AFTER THE LOCKDOWN

Regaining “the basics” like leaving homes, seeing relatives, friends, colleagues makes us happy



Q1. Taking all things together, would you say you are: Very happy, rather happy, not very happy, not happy at all

Base: 19,516 online adults aged 16-74, 18-74, or 19-74 across 27 countries. Fieldwork – Aug 2020

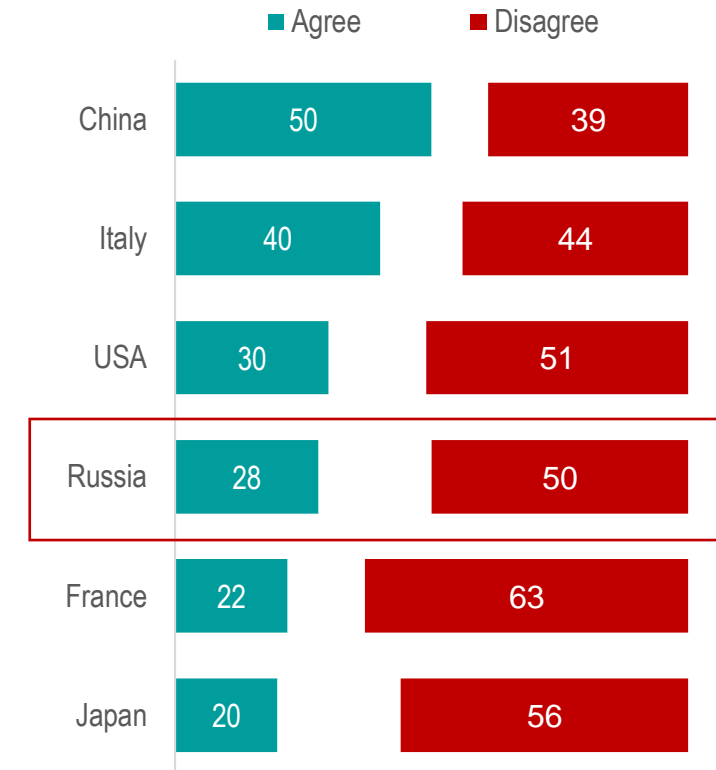
# TRADITIONAL VS INNOVATIVE

## TOP sources of happiness, %



Source: Global Happiness 2020  
Base: 16-74 y.o., N=500 (Russia)

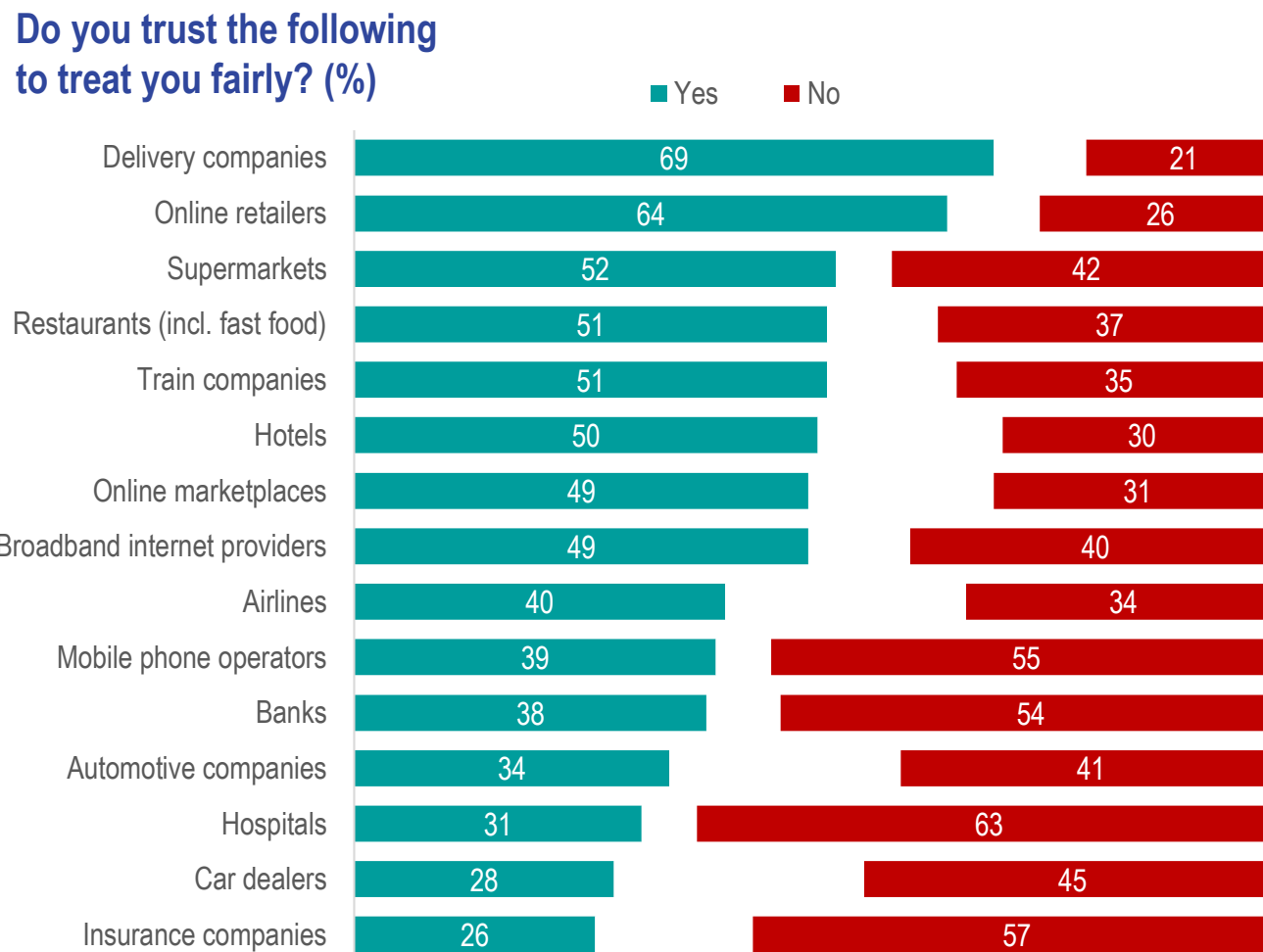
## I will always choose innovative brands over traditional brands, %



Source: [Ipsos Global Trends 2020](#)  
Base: 16-74 y.o., N=500-1000 depending on the country

# THE VALUE OF TRUST IS HIGHER THAN EVER

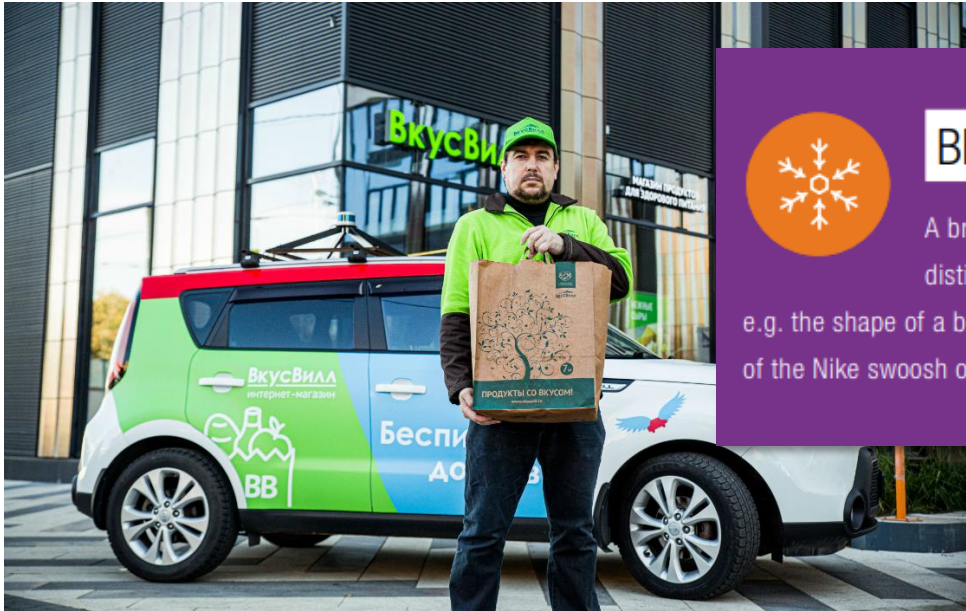
Delivery services, online retail and supermarkets, which combine both technology and the ability to quickly satisfy the consumer's desire, lead the way when it comes to confidence in organizations.



Source: [Ipsos Global Trends 2020](#)  
Base: 16-74 y.o. Russia. N=500

# IF YOU ARE ON TOP ON TRUST, YOU RISK MORE THAN OTHERS GOING FOR INNOVATIONS

## VKUSVILL. TESTING DRIVERLESS VEHICLE DELIVERS

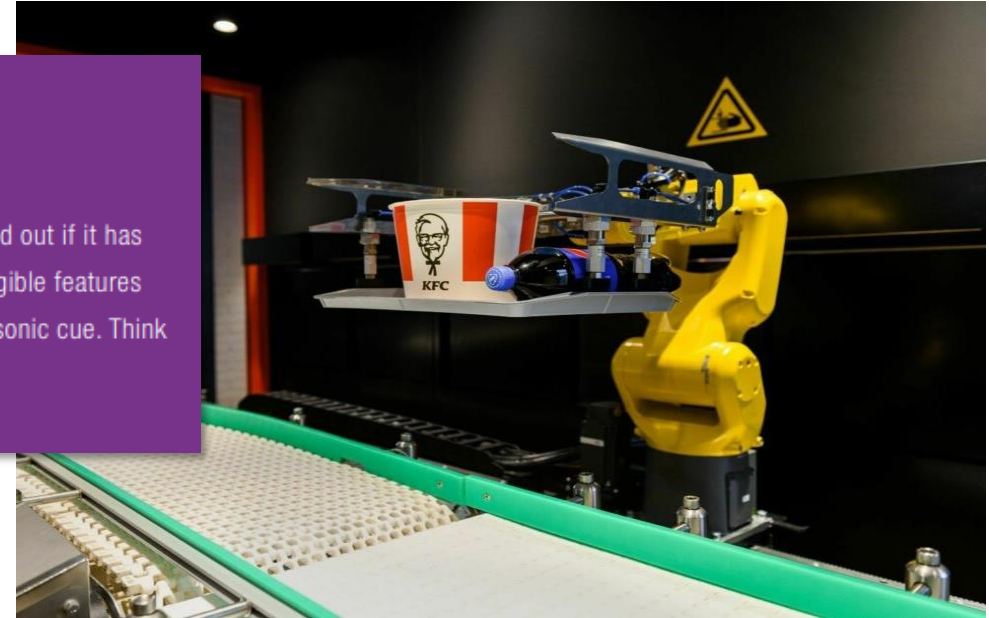


### BE UNIQUE

A brand is more likely to stand out if it has distinctive, authentic and tangible features e.g. the shape of a bottle, colour, celebrity or sonic cue. Think of the Nike swoosh or Red Bull's wings.

On October 5 2020, VKUSVILL (retail chain selling healthy products) announced the testing of **delivery services** with a **driverless car**. The engineer and a courier sit inside and communicate to clients.

## KFC. ROBO HAND SERVE CUSTOMERS



In June 2020, KFC in Moscow launched a pilot format with orders **only through digital kiosks** (without cash registers) and with **automatic delivery** of orders.



# X5 RETAIL GROUP

## E-GROWTH FUELED BY PANDEMIC

X5 Retail Group overperformed well-known leaders in the Russia e-commerce sector despite being mostly offline before the pandemic.



### THE SECRET TO BRAND GROWTH?

It hasn't changed, the secret to brand growth is a simple one: get **more people** buying, **more often** with the brand being **more easily** accessible.

# THE FORCE OF COLLABORATION AND BRAND ACTIVISM

## Retailers

Azbuka Vkusa,  
Perekrestok.ru,  
Ozon, Dodo Pizza  
and Delivery Club  
teamed up to install a  
monument in Moscow  
in gratitude to the  
couriers who worked  
in quarantine.



### STAGE AN INTERVENTION

Brands can stop consumers' mind-scrolling by designing interventions that make them pay attention, even for a second. Use this opportunity to reinforce or explain your key messages.



# S7 AIR COMPANY

## FLY AT HOME & OUR INCREDIBLE PASSENGERS

### DURING LOCKDOWN

The S7 airline offered its customers to **“Fly at home”** – a supportive game when people clicked the link “I stay home” every day and receive bonus miles for it.

### POST LOCK DOWN PERIOD

S7 continues to engage its clients, inviting them to re-discover the country and to **tell stories** about a new kind of travel in a post-pandemic world.

### S7 declared mission

To support people in their movement **TO HAPPINESS** and inspire those who strive for it to find the right path.



### CULTURE IS CRITICAL

The internal and external context in which people operate shapes their beliefs, values and goals. These factors are dynamic, constantly changing, and can change the way people relate to or associate with a brand.

THANK  
YOU

GAME CHANGERS

