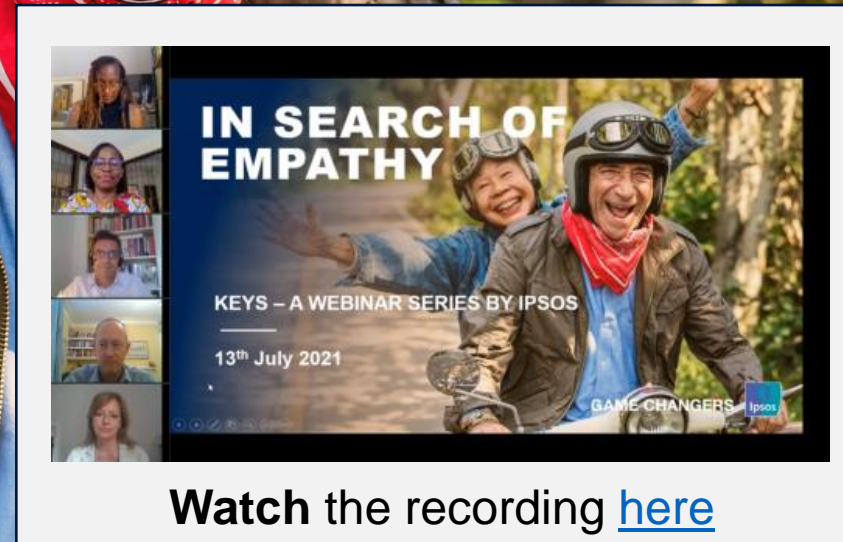


# IN SEARCH OF EMPATHY

KEYS – A WEBINAR SERIES BY IPSOS

---

13<sup>th</sup> July 2021



Watch the recording [here](#)

GAME CHANGERS





# AGENDA

## INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organisation

## THE YEAR SO FAR

Simon Atkinson

Chief Knowledge Officer, Ipsos

## EMPATHY AWAKENED

April Jeffries

Global President, Ethnographic & Immersive Research, Ipsos

## GETTING IT RIGHT

Douwe Rademaker

Global Service Line Leader, Market Strategy & Understanding, Ipsos

## CONNECTED BRANDS

Nanzala Mwaura

Chief Client Officer, Ipsos in South Africa



Watch the recording [here](#)

# THE YEAR (SO FAR)


---

**Simon Atkinson**  
Chief Knowledge Officer

**GAME CHANGERS**





- 
- A photograph of four people standing in a grassy area at night, holding sparklers to form the year 2021. The first person on the left holds a sparkler shaped like the digit '2'. The second person holds a sparkler shaped like the digit '0'. The third person holds a sparkler shaped like the digit '2'. The fourth person on the right holds a sparkler shaped like the digit '1'. The background is dark with some trees visible.
- 1. How it started**
  - 2. How it's going (so far)**
  - 3. The current context**

# 2021 Predictions Survey

70%

2020 was a **bad year** for me and my family

90%

2020 was a **bad year** for my country

77%

I **am optimistic** that 2021 will be a better year for me than it was in 2020



# 2021 Predictions Survey

52%

Unlikely that life will have **got back to normal** after the effects of the COVID-19 pandemic

Base: c. 15,700 online interviews across 31 markets, 23 October – 6 November 2020

61%

Likely that most people will **wear a mask** in public places a year from now

# SIX MONTHS IN: WHAT WORRIES THE WORLD?

Q Which three of the following topics do you find the most worrying in your country?



June 2021 results (28 countries) [here](#)

## Covid #1 concern

Dec 2020

47%

June 2021

36%



# SIX MONTHS IN: WHAT WORRIES THE WORLD?

Q Which three of the following topics do you find the most worrying in your country?



June 2021 results (28 countries) [here](#)

## Covid #1 concern

April 2020

63%

June 2021

36%



# #1: COVID NOT #1 WORRY EVERYWHERE

## December 2020

Belgium

Canada

France

Germany

Great Britain

India

Israel

Japan

Malaysia

Netherlands

Saudi Arabia

South Korea

Spain

The US

Turkey

Brazil

## June 2021

Australia

Brazil

Canada

Germany

Great Britain

India

Japan

Malaysia

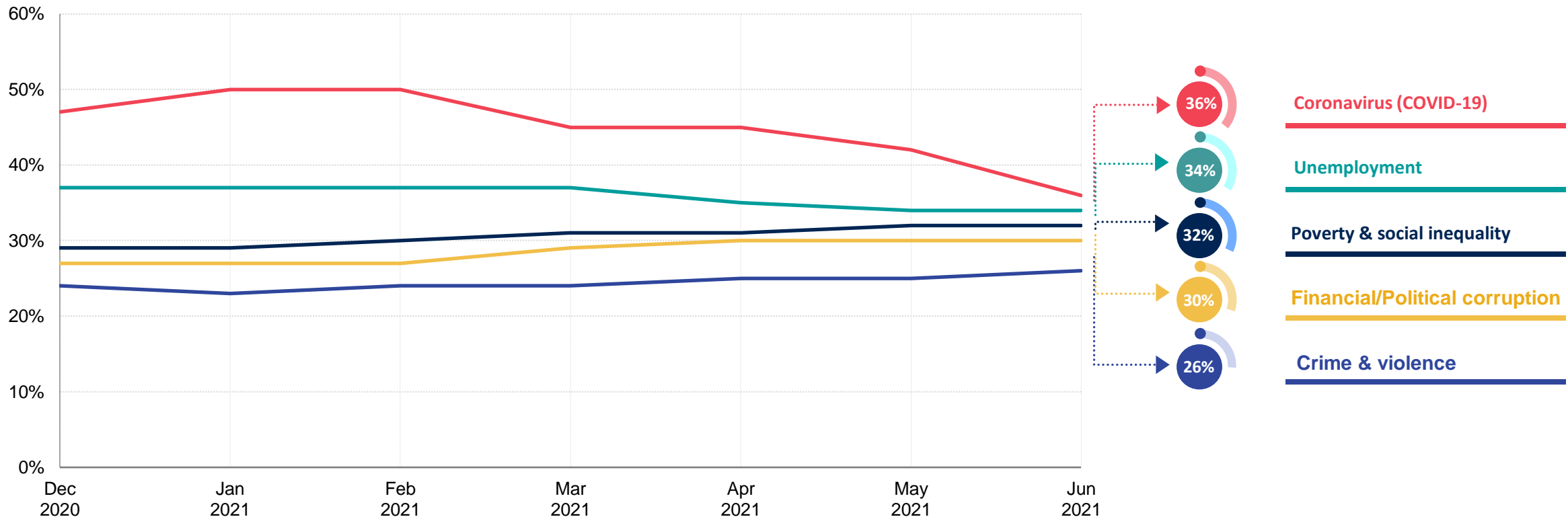
Peru

Saudi Arabia

Netherlands

# #2: THE BIG ISSUES DID NOT GO AWAY

**Q** Which three of the following topics do you find the most worrying in your country?

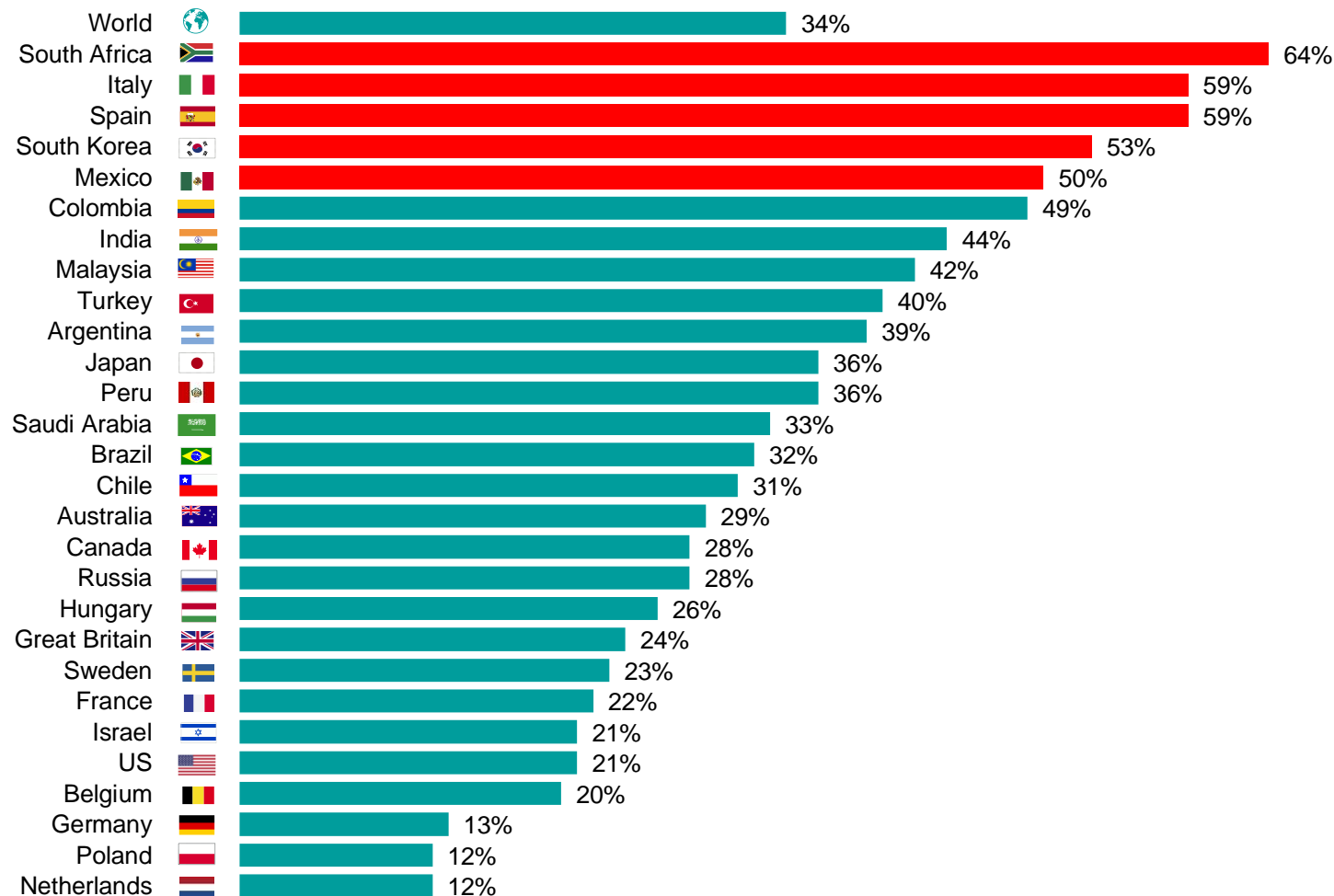


**Base:** Representative sample c. 20,000 adults aged 16-74 in 28 participating countries, 2013 - 2021.  
**Source:** Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*



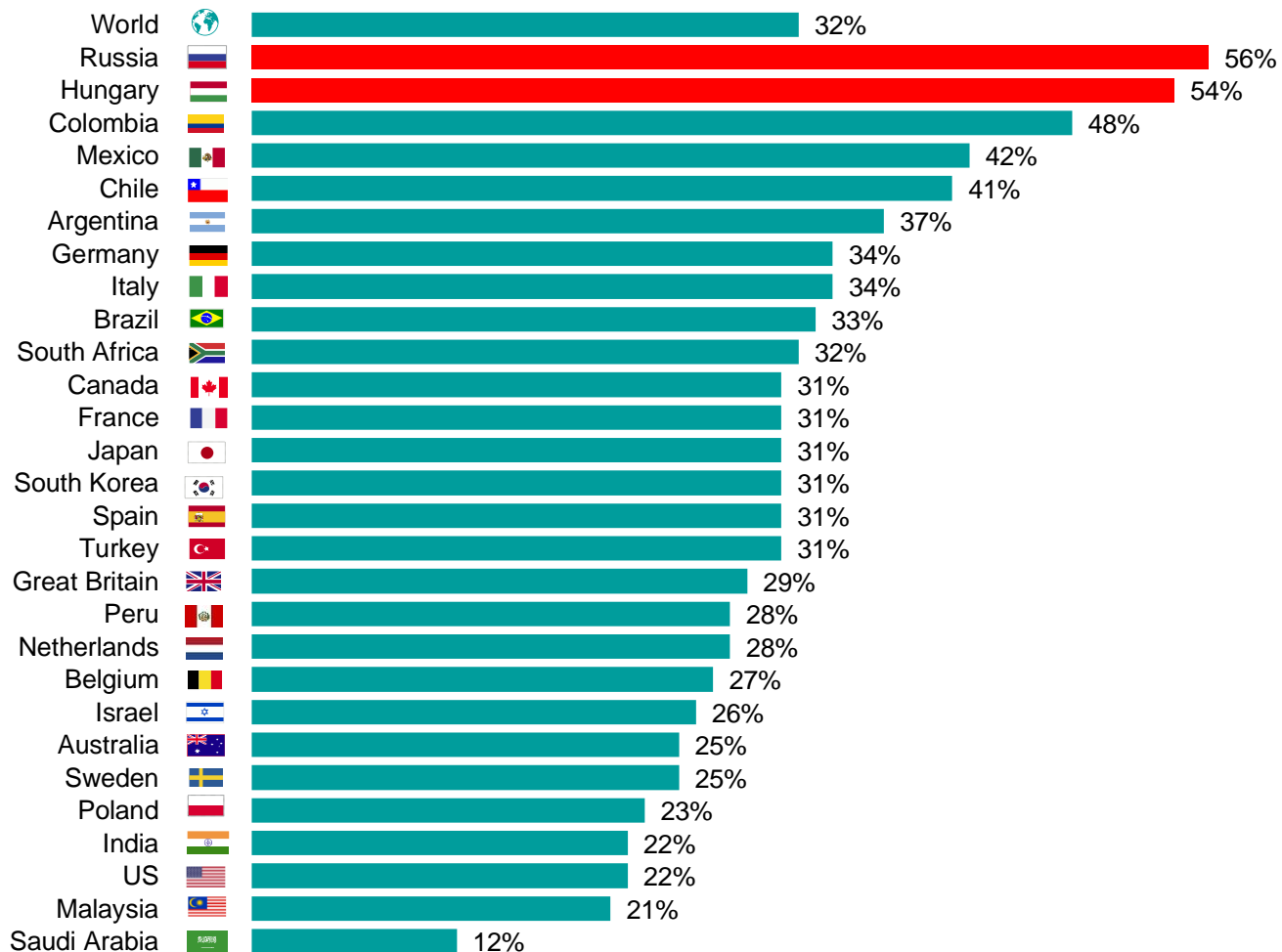
# THE BIG ISSUES: UNEMPLOYMENT AND JOBS

(%) worried in June 2021 in each country



# THE BIG ISSUES: POVERTY & SOCIAL INEQUALITY

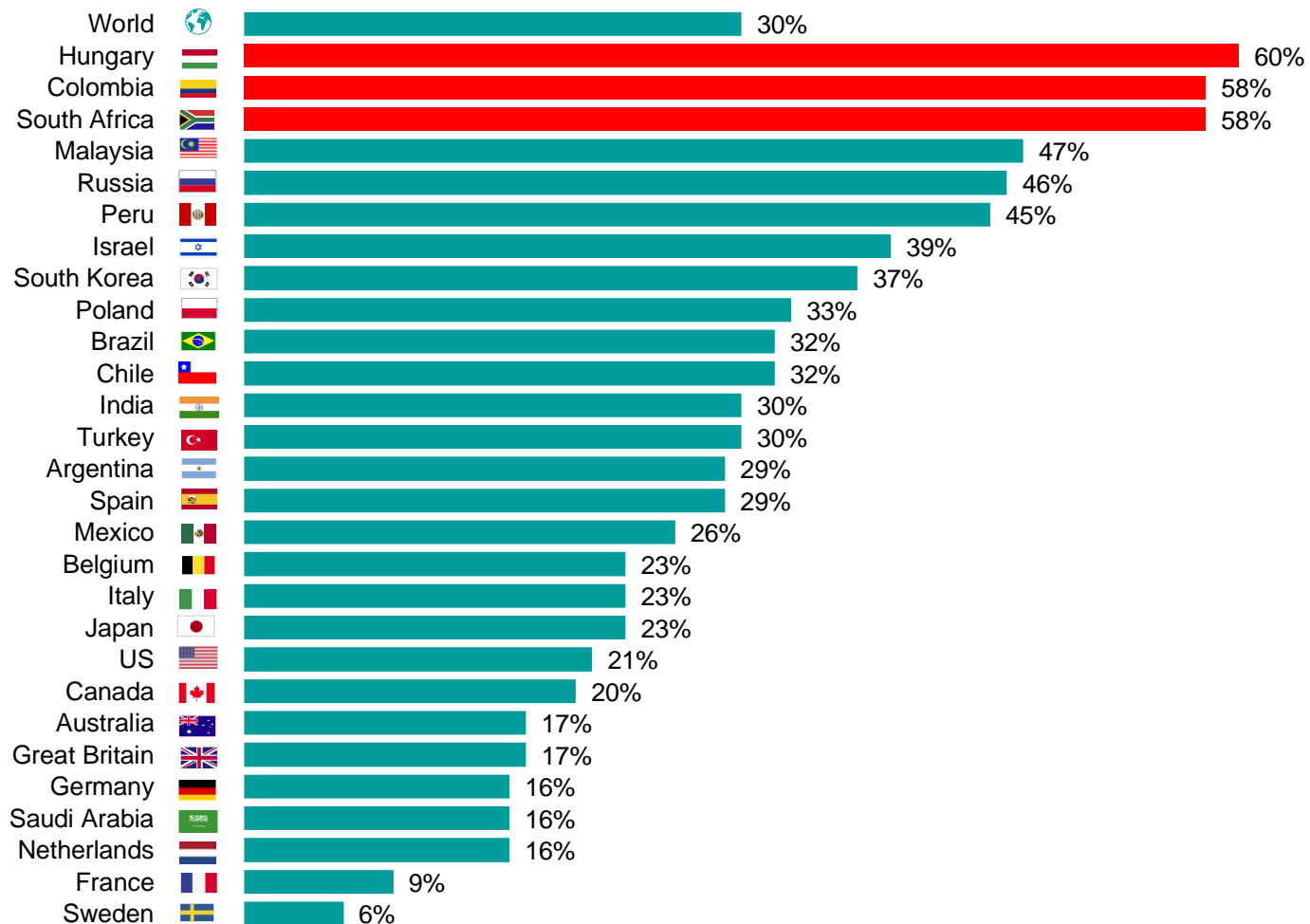
(%) worried in June 2021 in each country





# THE BIG ISSUES: FINANCIAL/POLITICAL CORRUPTION

(%) worried in June 2021 in each country



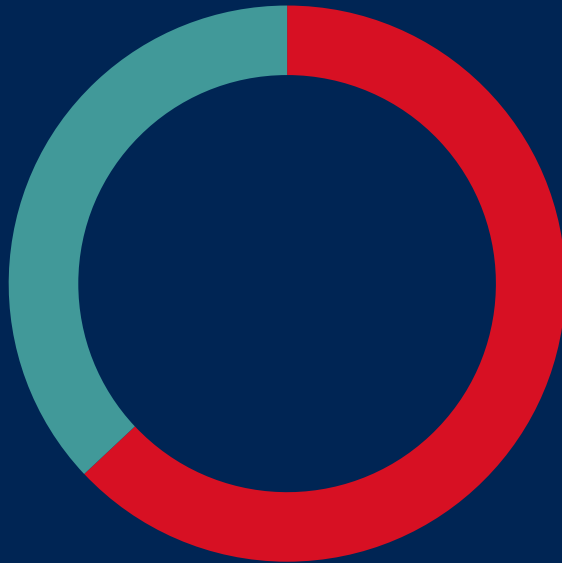
### #3: GLOOMY OUTLOOK?

A MAJORITY SAY THAT THINGS IN THEIR COUNTRY ARE “ON THE WRONG TRACK”

*28-country average*

**37%**

Right direction



**63%**

Wrong track

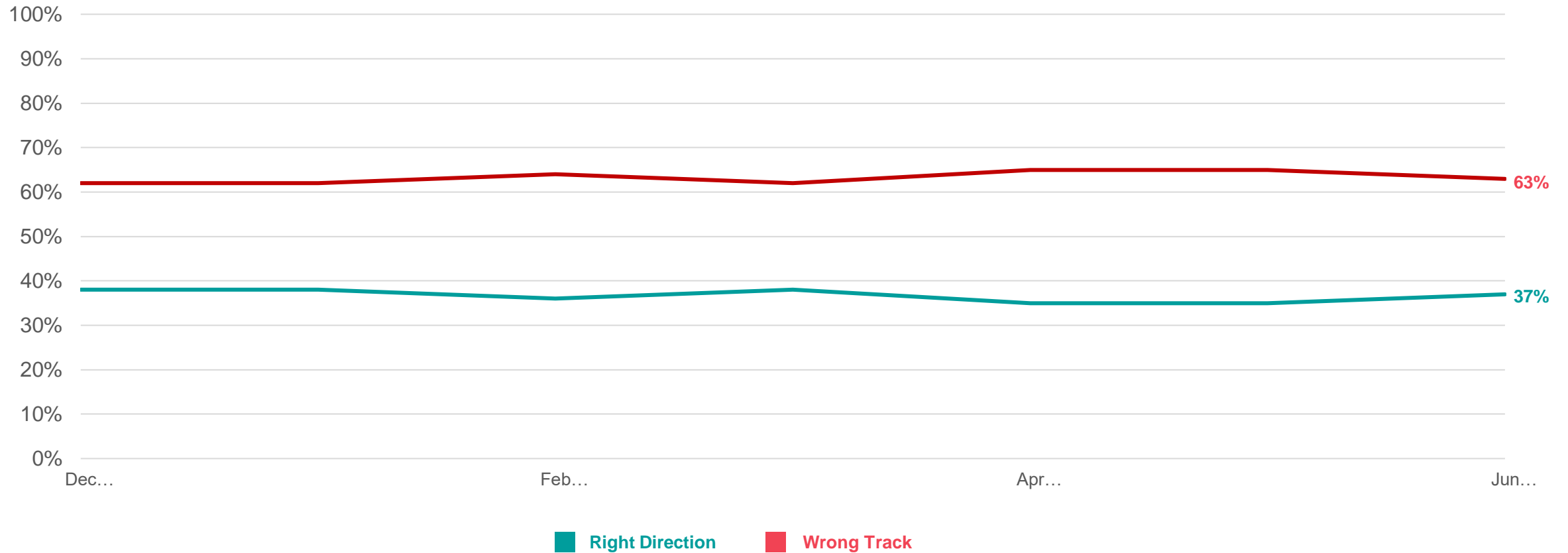
#### “Wrong track”: Top 5

1. Colombia 89%
2. South Africa 83%
3. Peru 83%
4. Turkey 79%
5. Hungary 77%

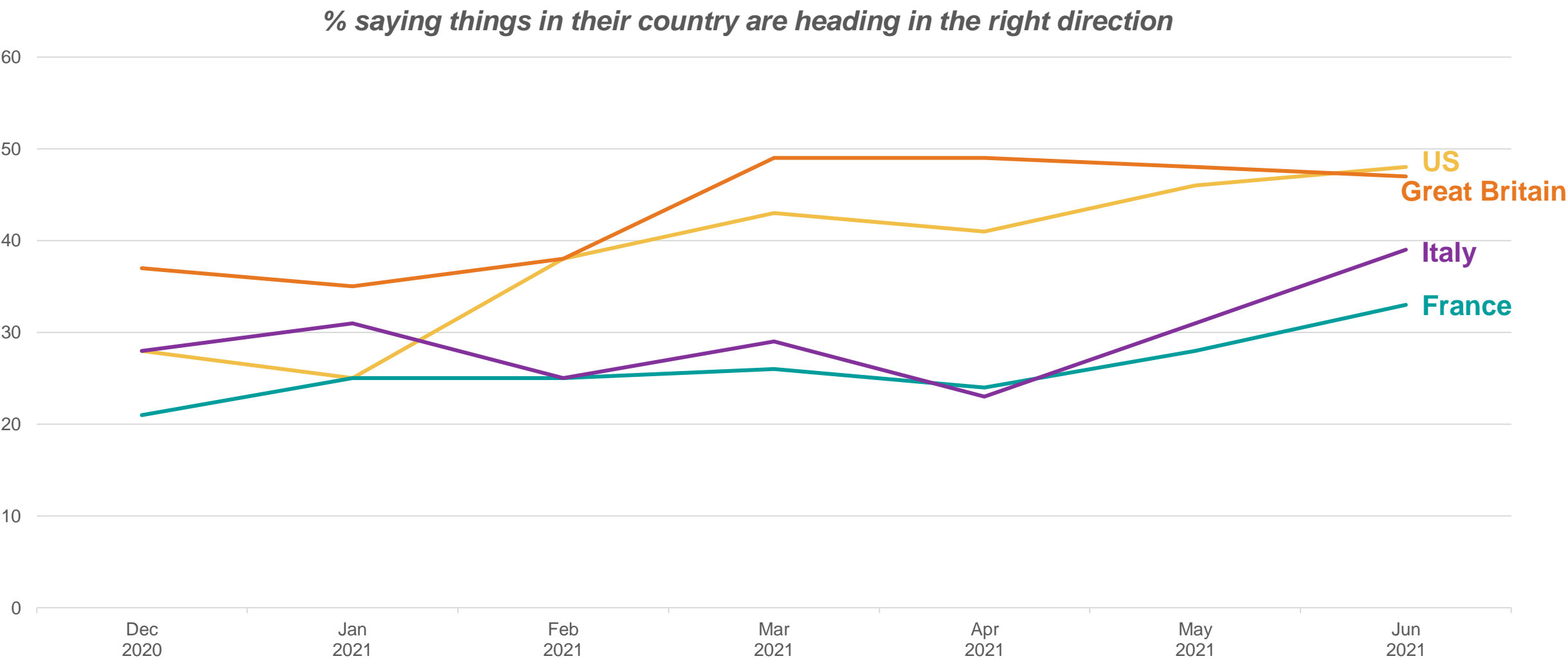


# “GLOBALLY, ATTITUDES HAVEN’T CHANGED MUCH”

**Q** Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track? (global country average)

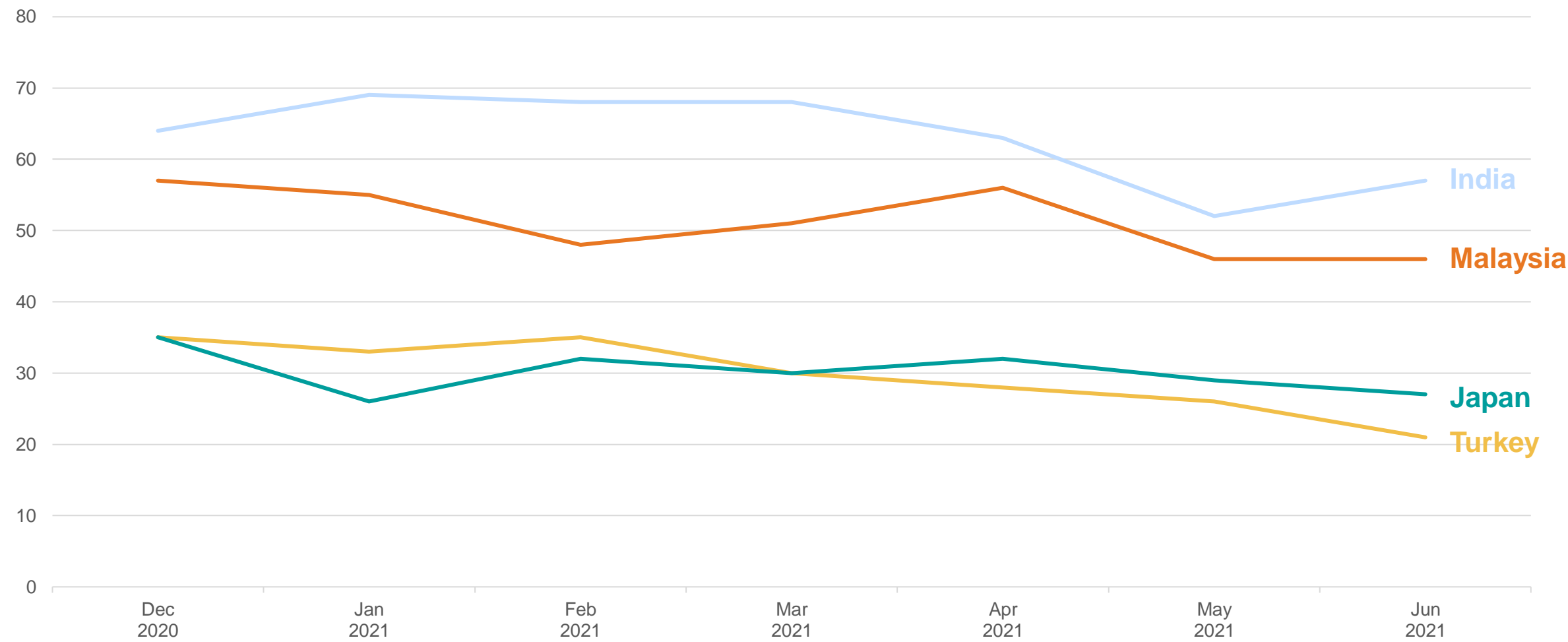


# #4: OPTIMISM PICKING UP IN SOME COUNTRIES



# #5: OPTIMISM FALLING IN OTHERS

*% saying things in their country are heading in the right direction*







# How it's going (so far)

## IPSOS ESSENTIALS

Tracking consumer attitudes and  
behavior in a time of crisis and recovery

Wave 44: June 30 – July 4, 2021



**16 countries: July results**  
[Essentials@ipsos.com](mailto:Essentials@ipsos.com)



# THEN: New year, same pandemic – following the holidays, more citizens are living under restrictions and lockdowns

## DEC/JAN 2021

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



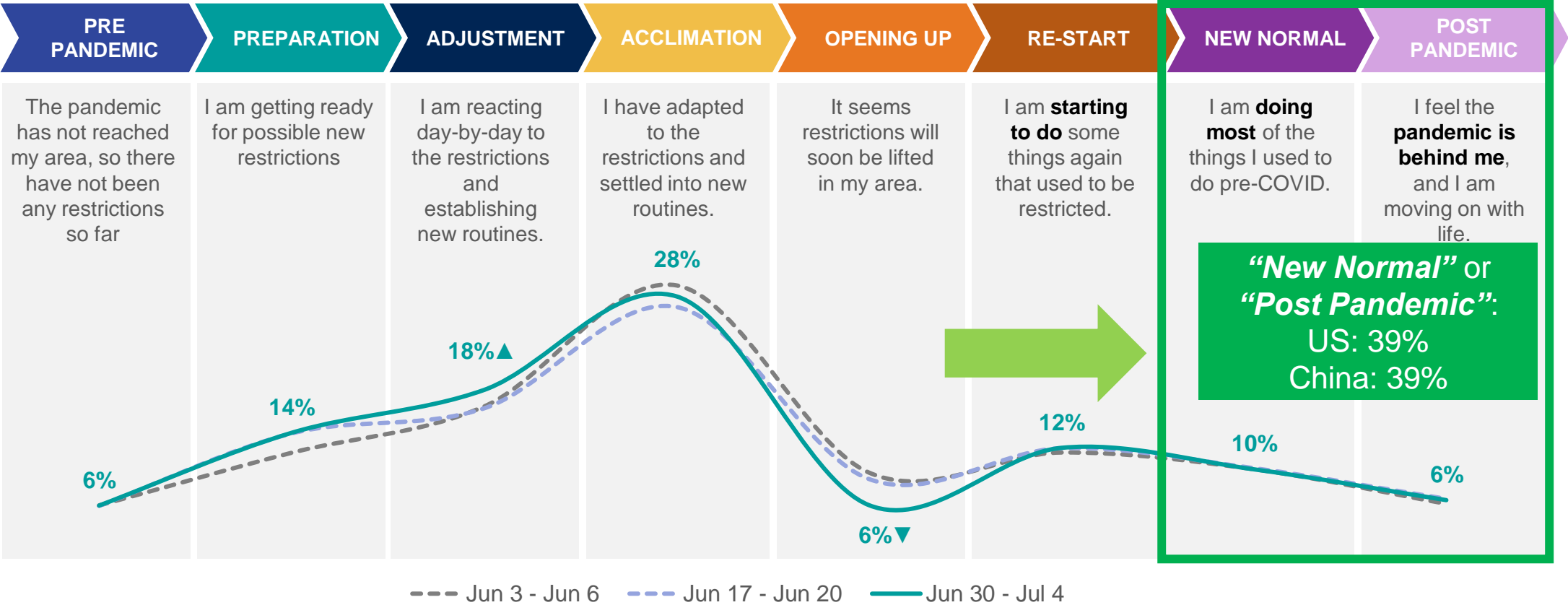
Q. There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation regarding the covid-19 pandemic (n=14523)

▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

# NOW: Halfway through year, same pandemic – but more varied picture

## JULY 2021

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



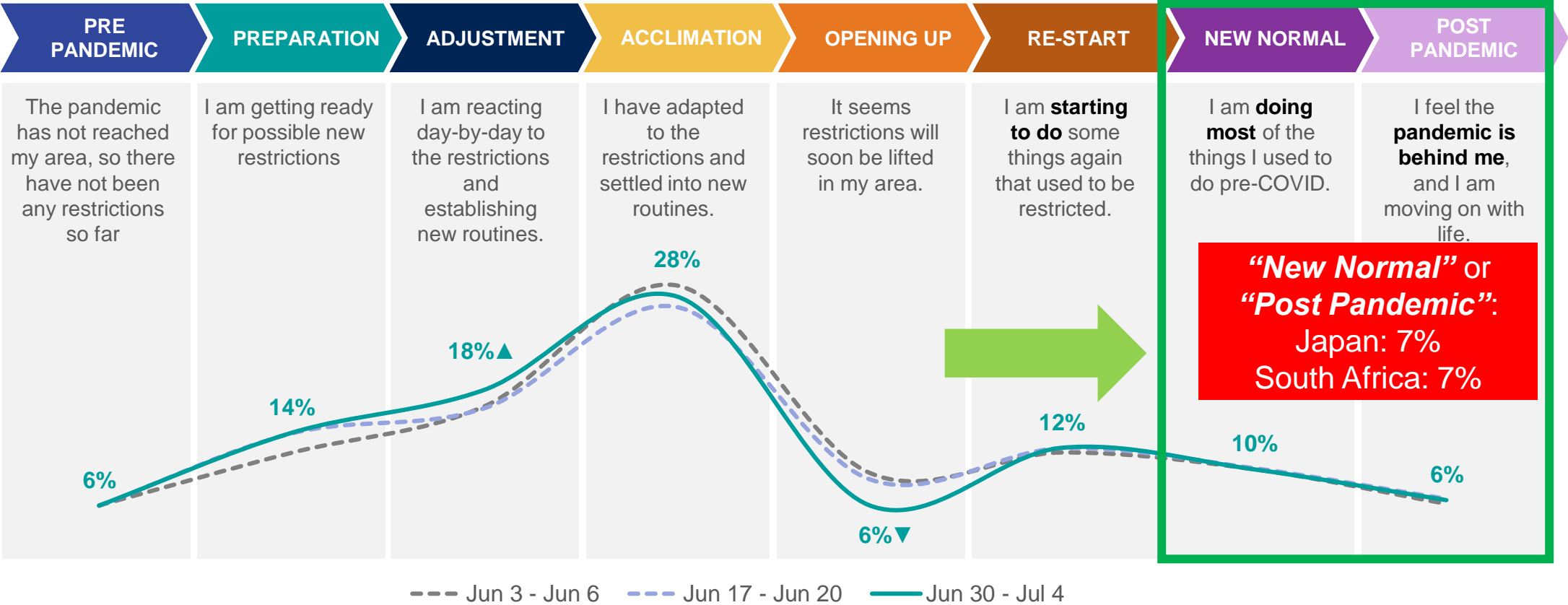
Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Jun 3 - Jun 6: 14498, Jun 17 - Jun 20: 14499, Jul 1 - Jul 4: 11514  
20 ▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



# NOW: Halfway through year, same pandemic – but more varied picture

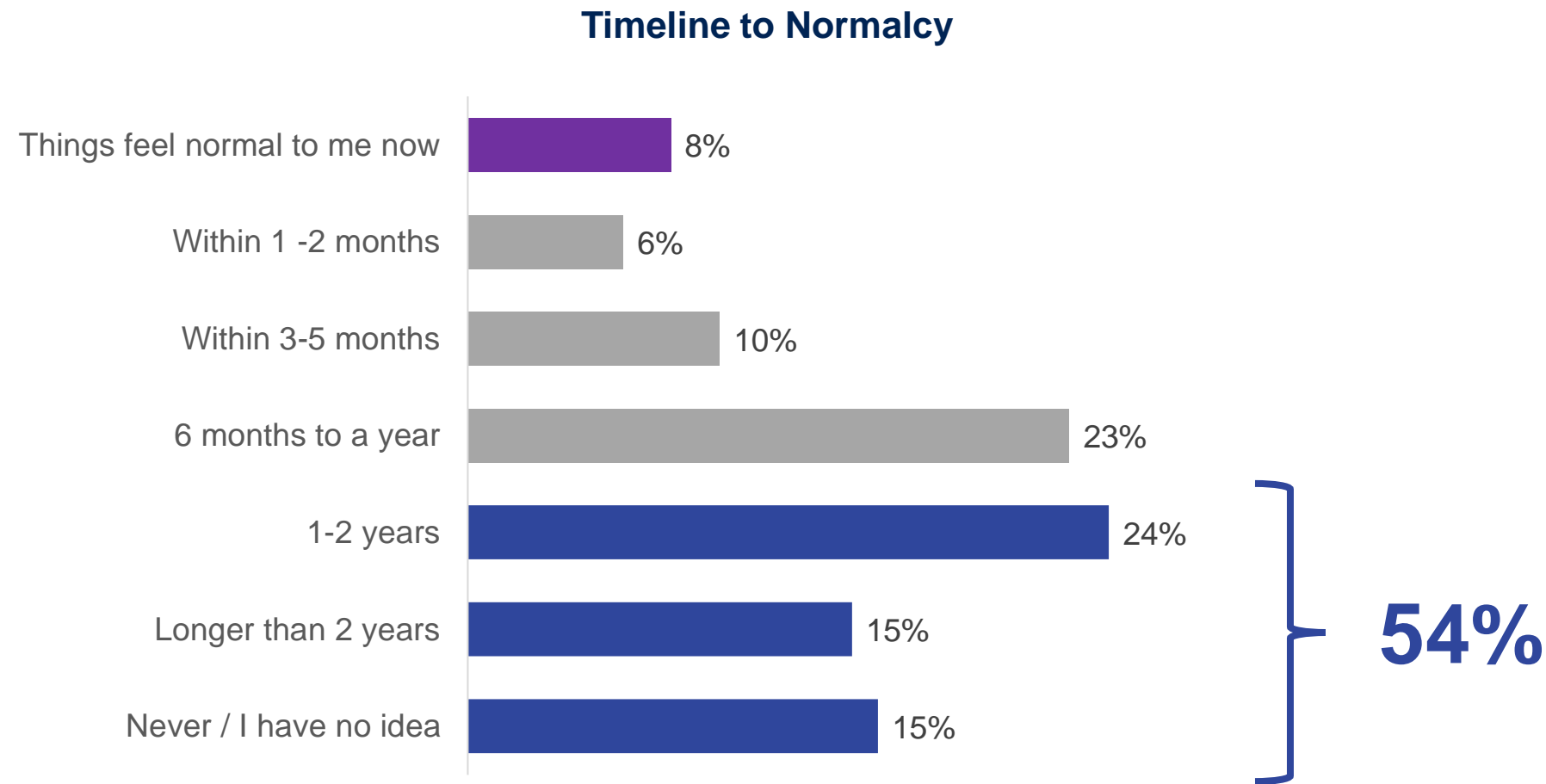
## JULY 2021

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?  
Base: Jun 3 - Jun 6: 14498, Jun 17 - Jun 20: 14499, Jul 1 - Jul 4: 11514  
21 ▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

# Time Estimation for a Return to “Normal”

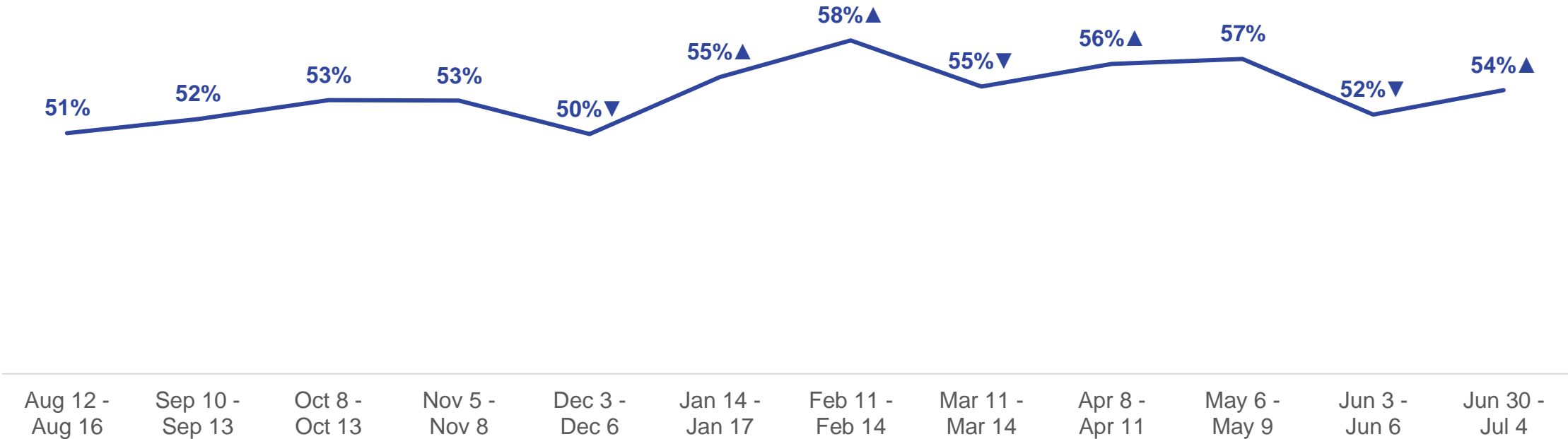


Q: How long do you think it will take before things feel like they are getting back to normal?  
Base: Global Country Average:11514



# Return to Normal: Trended

Return to Normal in MORE Than One Year  
(Including “Never / Don’t Know”)



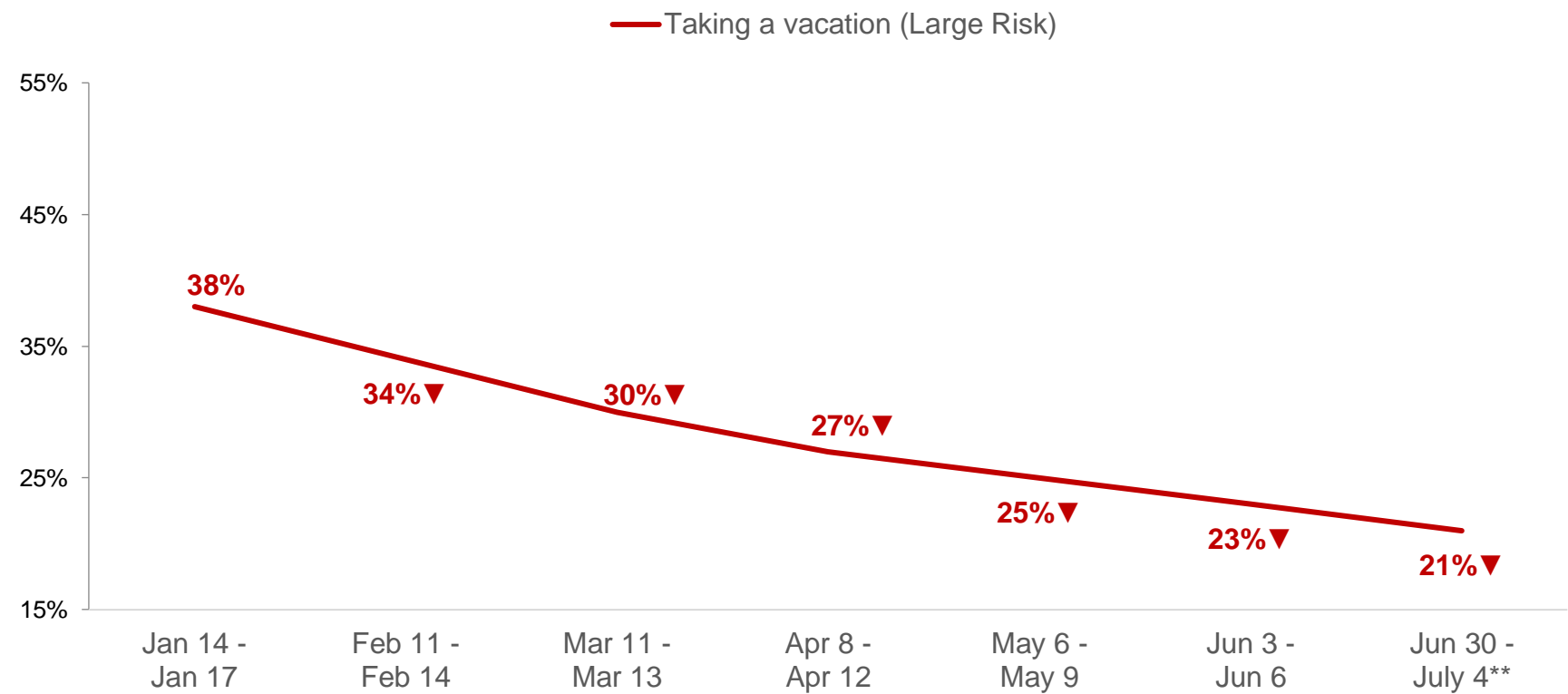
Q: How long do you think it will take before things feel like they are getting back to normal?  
Base: Aug 12 - Aug 16:15562, Sep 10 - Sep 13:14503, Oct 8 - Oct 13:14581, Nov 5 - Nov 8:14513, Dec 3 - Dec 6:14522, Jan 14 - Jan 17:14523, Feb 11 - Feb 14:14528, Mar 11 - Mar 14:14508, Apr 8 - Apr 11:14511, May 6 - May 9:14506, Jun 3 - Jun 6:14498, Jul 1 - Jul 4:11514  
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)





# (Starting to) Return to Normal? The Example of Travel

## Perceived Risk vs. Participation in Travel Activities

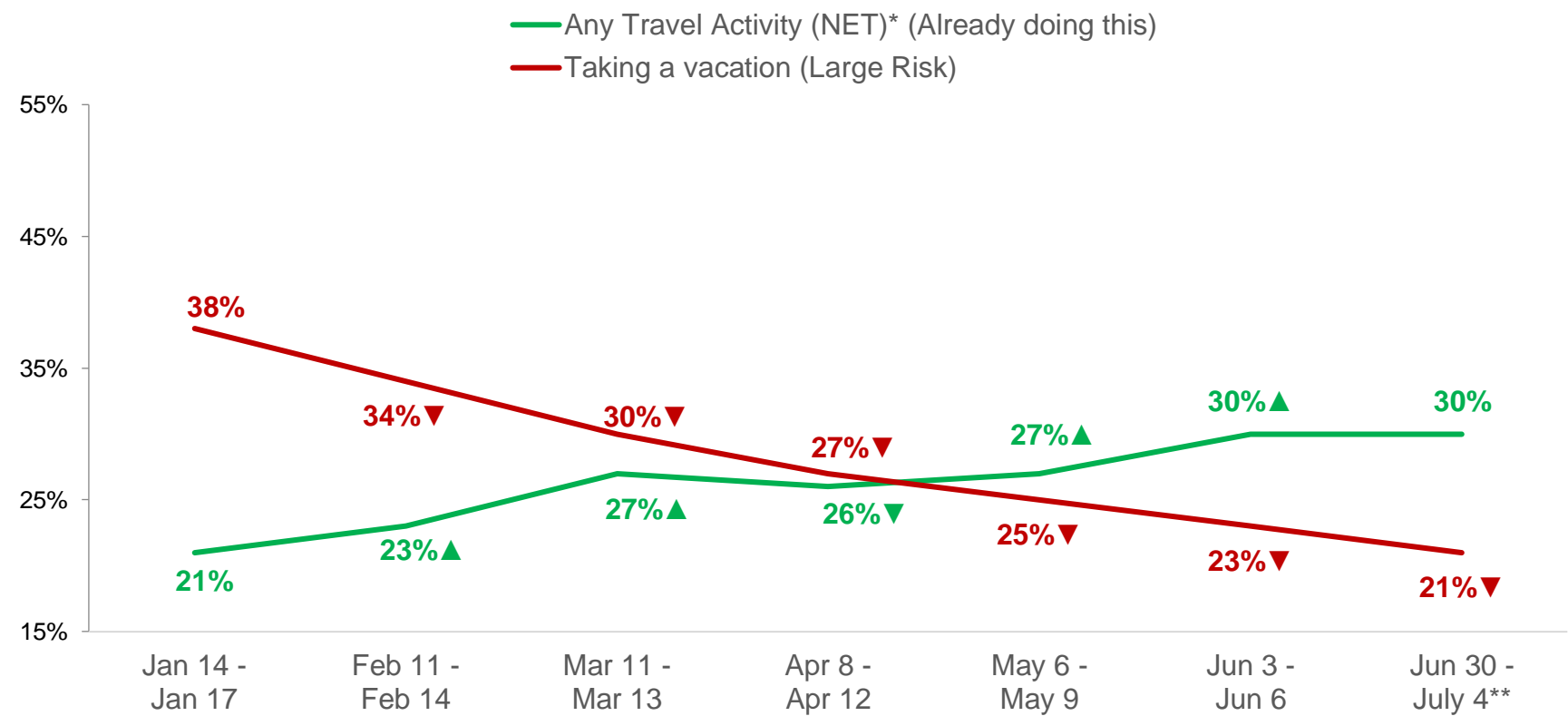


Q: For the following, when are you planning to do each of these activities again? (Base: 11514)  
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



# (Starting to) Return to Normal? The Example of Travel

## Perceived Risk vs. Participation in Travel Activities



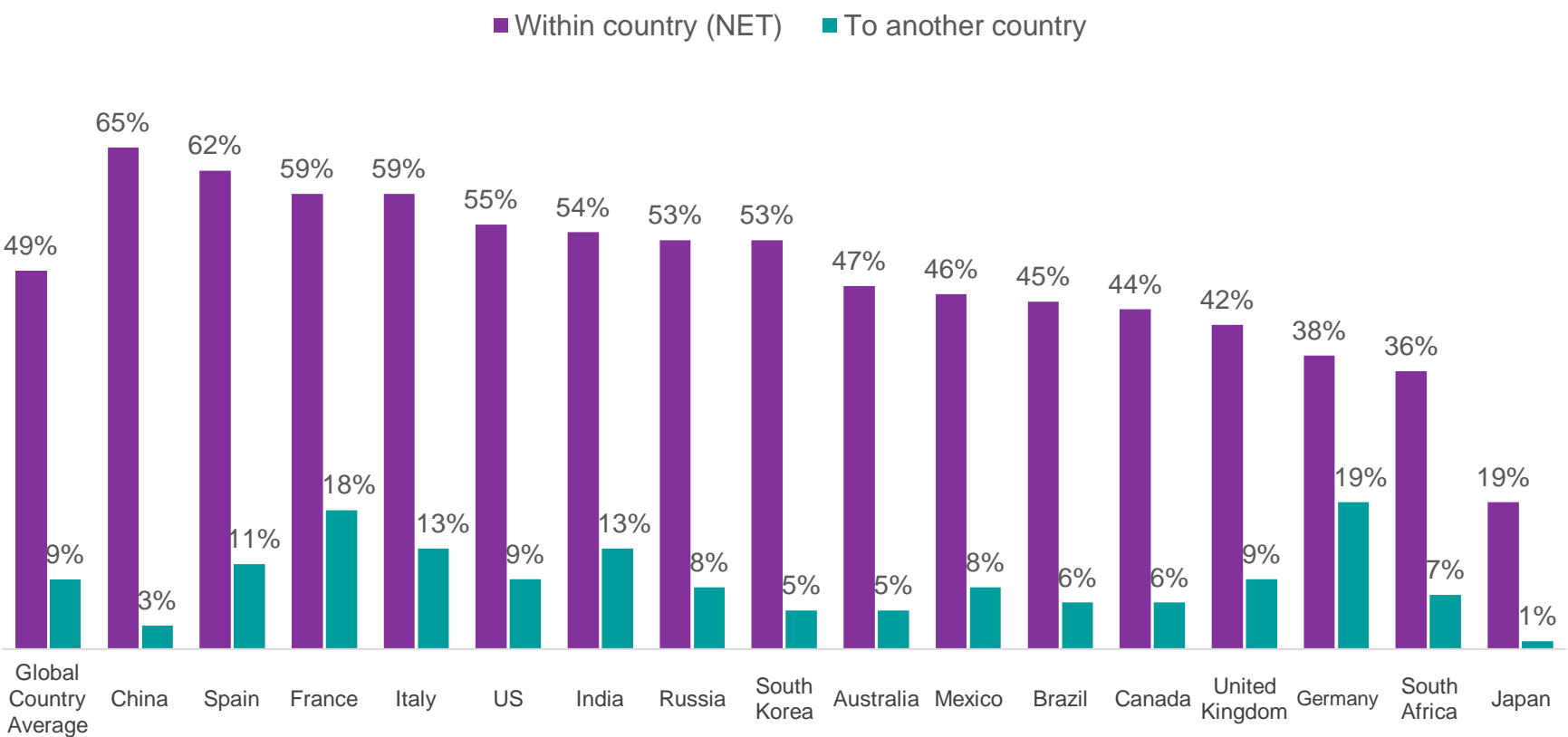
**Perceived risk** associated with travel activities continues to decline and **participation** continues to steadily increase

Q: For the following, when are you planning to do each of these activities again? (Base: 11514)  
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



# (Starting to) Return to Normal? It starts with domestic travel

## Plans for Leisure Trips in the Next 3 Months



### July 2020:

At this stage, any international travel plans focus on nearby countries

Q: Are you planning on taking any overnight trips for pleasure to any of the following places within the next three months? Select all that apply  
Base: 11514



# What Now? The societal context



# SOCIETY IN MID-2021



***“COVID-19 recovery takes priority over closing gender inequality globally, while women bear the brunt of the pandemic”***



# SOCIETY IN MID-2021



Globally the public ask: “*What is the plan to tackle climate change?*”

# SOCIETY IN MID-2021



“Global Survey points to a *generation gap* around gender identity and sexual attraction”



# SOCIETY IN MID-2021



“A mixed picture:  
support for *the principle* of being  
able to seek refuge  
from war and  
persecution, but...”

# 2021 SO FAR: RESOURCES



## Report Links

[International Women's Day](#)

[Earth Day](#)

[Pride 2021](#)

[World Refugee Day](#)

[Ipsos Update: July 2021](#)



**"People know the difference, and reward brands that are *Real*."**

Download the White Paper [here](#)





# EMPATHY AWAKENED

---

**April Jeffries**  
Global President, Ethnography &  
Immersive Research

**Podcast:**  
Explore the  
*Cultural  
Intelligence*  
series  
[here](#)



**GAME CHANGERS**



# EMPATHY AWAKENED

A Program of Authentic Connection

07 | 09 | 2021

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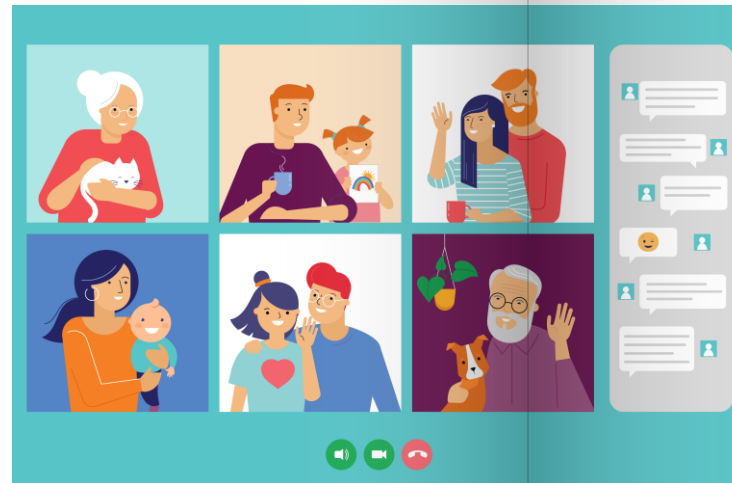
# Global Makeover

## Data Tracking Before and After



### New Habits

Health / Wellness  
New Home/ Workplace  
Digitalization



### New Appreciation

Travel and Life Outdoors  
Meaningful Connections



### New Responsibility

Revolution of Choice  
A Better World

# Why Empathy & Why Now?

Harness the power of two key capabilities



Stay at the forefront of what we see  
and know through **DATA**



**EMPATHY** is looking beyond the data into  
the life of people...to understand their  
motivations and emotions



# HOW WE OFTEN TALK ABOUT PARENTING...

*“Seeing him grow  
every day inspires  
the best in us all!”*

Mother, SA



## THE REALITY OF PARENTING





# Empathy

**is a powerful instrument for solving the problems of others and is physically rooted in who we are**



# Empathy

Allows your **HEAD**

To affect your **HEART**

Driving a **GUT** level  
response

To move your **FEET**  
and **HANDS** towards  
action



# Building Empathy Muscle

## Where Do You Stand?

Behavioral Science experts at Ipsos have developed **5 key areas to evaluate** an organization's empathy profile and to determine the best path for improvement:



## Evaluating Empathy

### Motivation

Are you motivated to put empathy at the focus

### Ability

Do you have the skills to have real, courageous conversations

### Processing

Do your routines and ways of working put real people at the heart of what you do

### Physical

Is the environment set up to support a people-centric focus

### Social

Do the organizational norms and values support an empathetic priority



# Ways to Why

## The principles and skills of empathy



### Hear

Deep listening and connection



### See Me

Ethnographic principles of observation



### Understand Me

Human understanding at a level that drives towards action

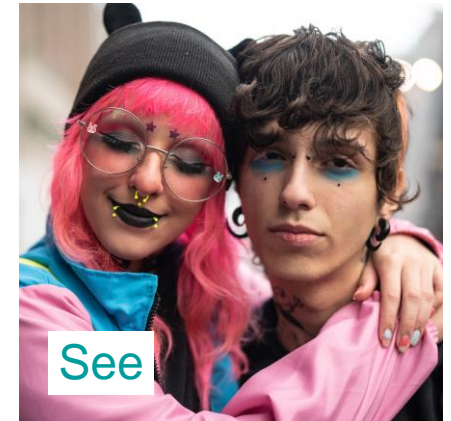


### Experience Me

Activity designed to connect and build empathy



Hear



See



Experience



Understand



Which do you have?

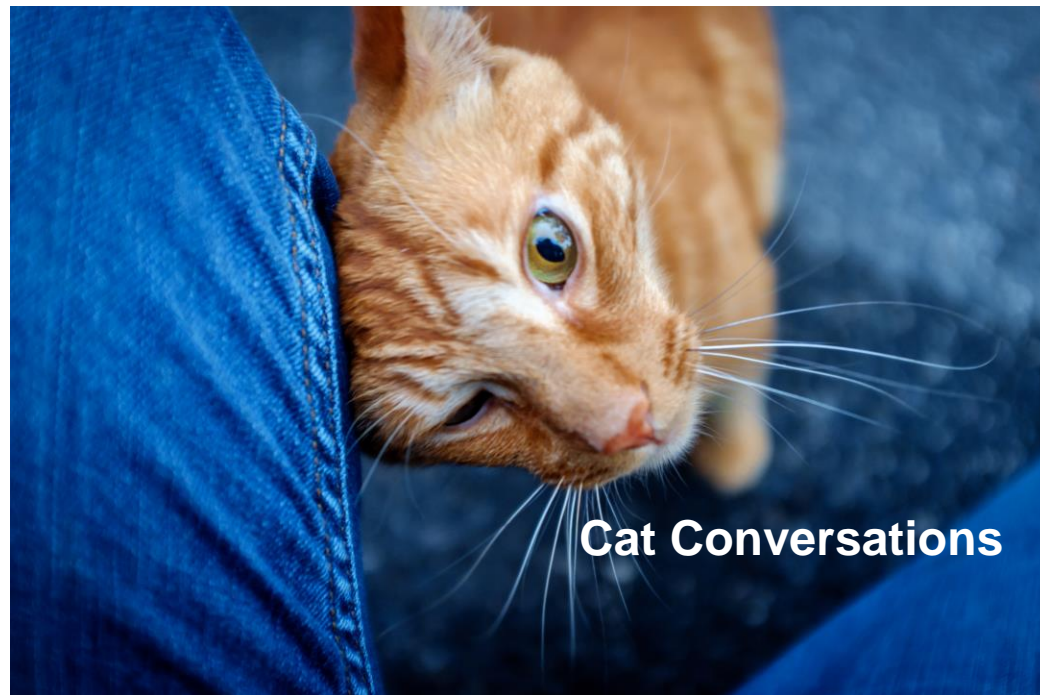
## Dog Conversations



## Cat Conversations

Which do you have?

## Dog Conversations



## Cat Conversations

**No offense but...  
It's not about you**

## Dog Conversations



### People Questions : (all about others)

1. How to reassure
2. How to make things easy
3. How to build confidence
4. How to inspire a moment

No offense but...  
**It's not about you**

## Cat Conversations



### Business Questions : (all about us)

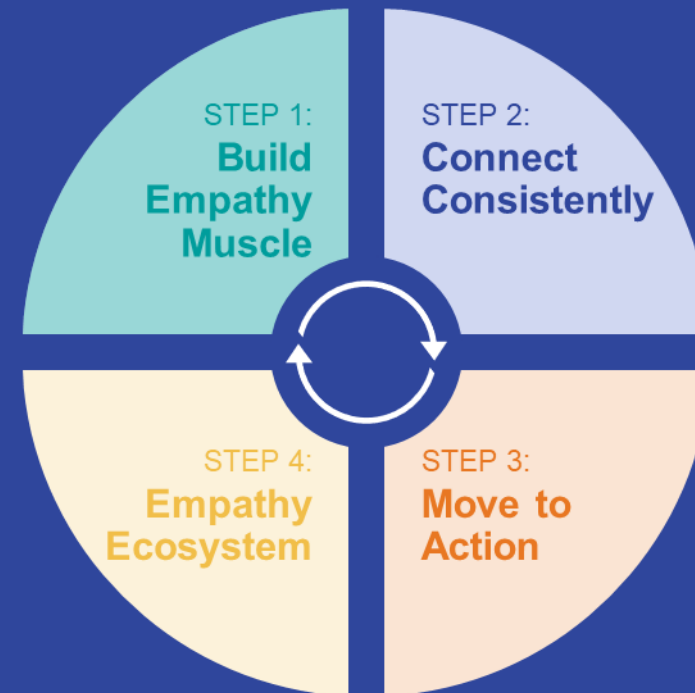
1. Build penetration
2. Drive volume
3. Increase frequency
4. Improve share – of market, pantry, stomach





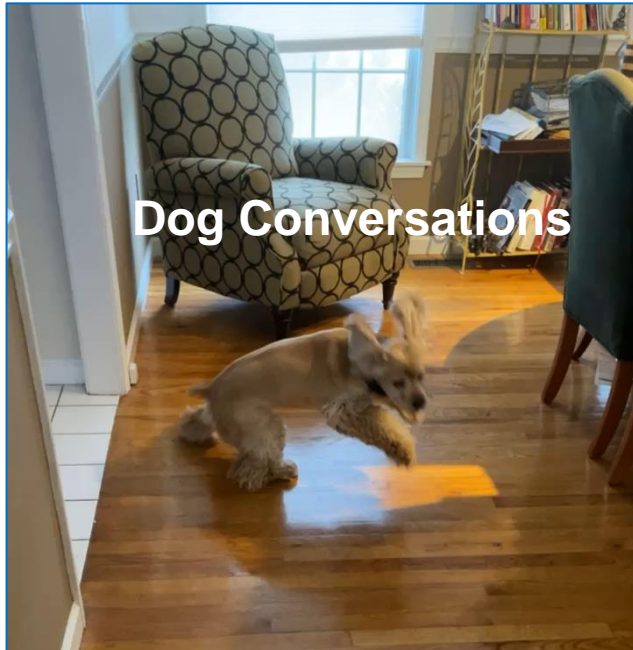
# 4 Steps to Consumer Empathy

A PROGRAM OF AUTHENTIC CONNECTION





Which do you have?





# GETTING IT RIGHT



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**Douwe Rademaker**  
Global Service Line Leader,  
Market Strategy & Understanding

**GAME CHANGERS**



# GETTING IT RIGHT

The Brand  
Strategy Podcast



**DOUWE RADEMAKER  
& CHRIS MURPHY**

create empathetic  
brands in today's  
**turbulent world**

*Over 5 hours of Podcast content  
summarized in 8 mins*

Explore the Podcast  
episodes [here](#)

**GAME CHANGERS**







## **PEACEFULLY ANCHORED BRAND**

# Brand strategy in a **'peaceful'** world

- A clear and robust brand positioning
- Regular brand tracking to ensure brand is still 'on anchor'
- Not much contextual changes
- A stable brand portfolio management







**BUT ... YOUR BRAND CONTEXT IS BECOMING MORE TURBULENT**





Commission-free Stock Trading & x


+

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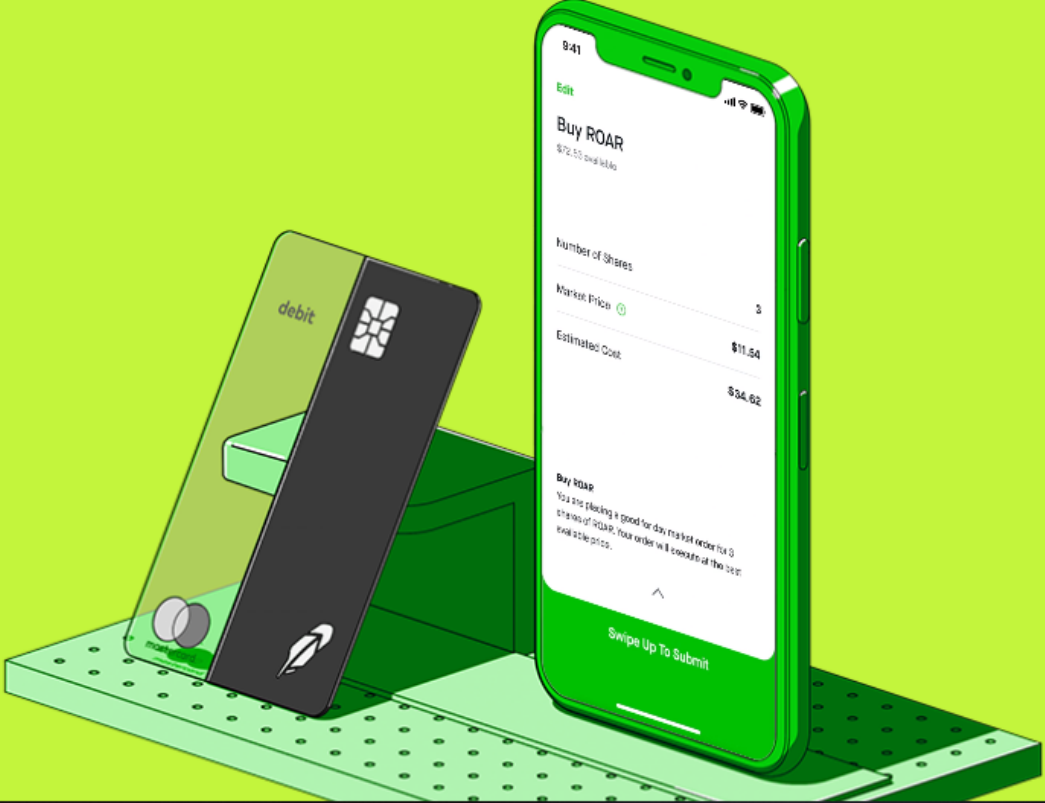
Sign Up

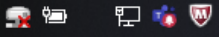

# Investing for Everyone

Commission-free investing, plus the tools you need to put your money in motion. Sign up and get your first stock for free. Certain limitations apply.

Sign Up

 Commissions & Free Stock Disclosures





ENG 09:44 08/07/2021 27





# Creating brand empathy in a '**turbulent**' world

- Use a strong anchor
- Make sure you have a strong anchor line
- And make sure your anchor line is long enough
- Keep a close eye at your surroundings



# Step 1

## Use a strong anchor

*How strong is your brand DNA?*

- Strong yet simple DNA
- Have your brands 'own' this DNA



open happiness™



## Step 2

# Make sure you have a strong anchor line

How strong is your portfolio's brand equity?

- A simple brand equity model and agile tracking system





## Step 3

# And make sure your anchor line is long enough

How agile are your brands' positionings?

- 'Table stakes' positionings (sustainability, brand purpose)
- 'Local agile' and 'global emotional' brands positionings.
- Use your distinctive brand assets to strengthen positioning
- Your brand is an experience, not a product







Teriyaki  
Samurai  
Burger

Twister  
Fries

Fuji Apple  
McFreeze.

Ebi Burger  
\*contains shrimp



## Step 4

# Keep a close eye at your surroundings

What is happening in the broader category and are you staying relevant?

- Develop scenarios to get a grip on a volatile future and develop flexible strategies and brand positionings
- Track in-the-moment usage to find new trends, new occasions, new competition, and to re-define your category
- Lead the social conversation













# In summary:

## A four-step framework towards a more empathetic brand

### Step 1

Use a strong anchor  
Define your brand DNA

### Step 2

Make sure you have a strong anchor line  
Track your brand equity

### Step 3

Make sure your anchor line is long enough  
Define agile brand positionings

### Step 4

Keep an eye on your surroundings  
Track your context





# And finally, building data-driven empathetic brands

- Link sales, contextual, usage, positioning and equity data in one data platform
- Analyze and track KPI's with a direct impact on sales/usage



# GETTING IT RIGHT

The Brand  
Strategy Podcast

# Thank You



DOUWE RADEMAKER  
& CHRIS MURPHY

GAME CHANGERS



# CONNECTED BRANDS – A SUB SAHARAN AFRICA PERSPECTIVE

**Keys – A Webinar Series by Ipsos**

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**Nanzala Mwaura**  
Chief Client Officer,  
Ipsos in South Africa

**GAME CHANGERS**





# WE ARE ONE!

....yet one of the most diverse continents in the world

## Original cultures

Tribes  
Traditional beliefs

Britain Germany  
**Colonial powers**  
Portugal Netherlands  
Spain France

Christianity Islam  
**Religion**  
Traditional beliefs

Travel Internet  
**Globalisation**  
Access to Western culture

Capitalism  
**Post-colonial ideologies**  
Industrialisation Socialism

**Liberation struggles**

