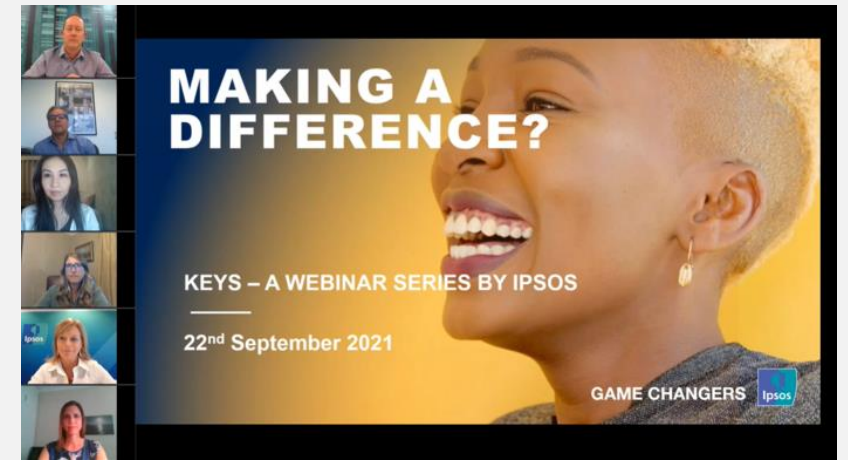


MAKING A DIFFERENCE?

KEYS – A WEBINAR SERIES BY IPSOS

22nd September 2021



Watch the recording [here](#)

GAME CHANGERS



AGENDA

INTRODUCTION

Jennifer Hubber

Head of Ipsos Global Client Organisation

THE CURRENT CONTEXT

Simon Atkinson

Chief Knowledge Officer, Ipsos

Chris Murphy

Global President, Brand & Market Strategy, Ipsos

WOMEN IN ADVERTISING

Jill Urlage

Vice President, Global Products & Innovation, Creative Excellence, Ipsos

DELIVERING ON PROMISES

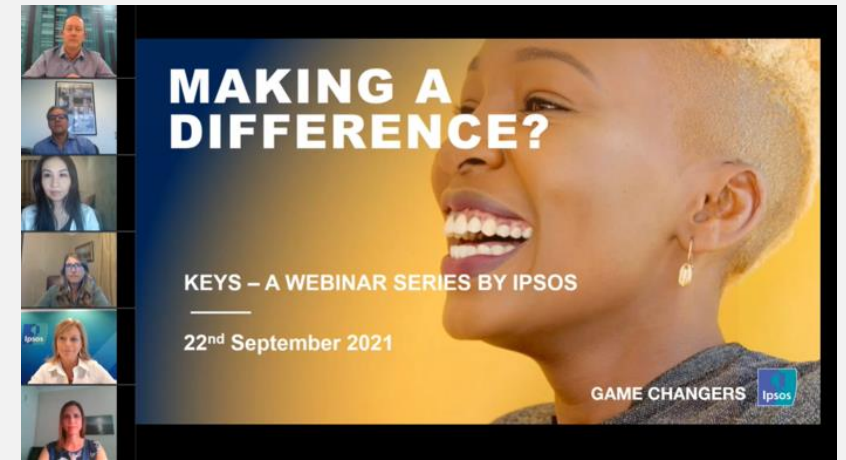
Catherine Burton

Equity Lead, Brand Health Tracking, Ipsos

DRIVERS OF INFLUENCE

Cintia Lin

Head of Creative Excellence, Ipsos in Brazil



Watch the recording [here](#)

#1: THE CURRENT CONTEXT

KEYS – A WEBINAR SERIES BY IPSOS

Simon Atkinson

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THE CURRENT CONTEXT: CONSUMER CONFIDENCE

SOCIETY - 16 September 2021

As Delta spreads, global consumer confidence is frozen in place



Sept 2021 release:
Three consecutive months of little change

THE CURRENT CONTEXT: CONSUMER CONFIDENCE

SOCIETY - 16 September 2021

As Delta spreads, global consumer confidence is frozen in place

Sept 2021 release:
Three consecutive months of little change

GLOBAL VIEWS ON LOCAL ECONOMIC RECOVERY FROM COVID-19

29-country Ipsos survey for the World Economic Forum

August 2021



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For more information, go to <https://www.ipsos.com/en/local-economic-recovery-wef-ipsos-global-advisor-survey>

73% say it will take “at least two more years” for my country’s economy to recover

THE CURRENT CONTEXT: COVID-19



Covid remains #1 issue, highlighted by **37%** (28 country average)

Levels of concern running at over 50% in Malaysia, Japan, S.Korea & **Australia**

THE CURRENT CONTEXT: GLOBAL OR LOCAL?

WORLD OPINION ON GLOBALIZATION AND INTERNATIONAL TRADE IN 2021

Ipsos Global Advisor 25-Country Survey for the World Economic Forum
August 2021

For more information, go to <https://www.ipsos.com/en/sentiment-about-globalization-cooler-pandemic-across-world>

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**75% say expanding trade
is “a good thing...”**

**48% say globalization is
“good for my country”,
down 10 on 2019...**

Malaysia 72%

France 27%

THE CURRENT CONTEXT: OUR PLANET



73% say the world is **close to “tipping points”** because of human action

75% agree the pandemic has shown that **“it is possible for behaviour to transform rapidly”**

Only a quarter (26%) feel that Covid-19 has made protecting and restoring nature a **lower priority**

THE CURRENT CONTEXT: LINKS TO RESOURCES

SOCIETY - 16 September 2021

As Delta spreads, global consumer confidence is frozen in place



WORLD OPINION ON GLOBALIZATION AND INTERNATIONAL TRADE IN 2021

Ipsos Global Advisor 25-Country Survey for the World Economic Forum
August 2021

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WHAT WORRIES THE WORLD?

August 2021

GAME CHANGERS Ipsos



THE GLOBAL COMMONS SURVEY

Attitudes to planetary stewardship and transformation among G20 countries

GLOBAL COMMONS ALLIANCE
A PLAN FOR THE PLANET



Access the Reports

[Consumer Confidence Index](#)

[Economic Recovery Survey](#)

[What Worries the World](#)

[Global Commons Survey](#)

[Ipsos Update: September 2021](#)

IPSOS UPDATE

A selection of the latest research and thinking from Ipsos teams around the world

September 2021

Ipsos Knowledge Centre

GAME CHANGERS Ipsos



IPSOS ESSENTIALS

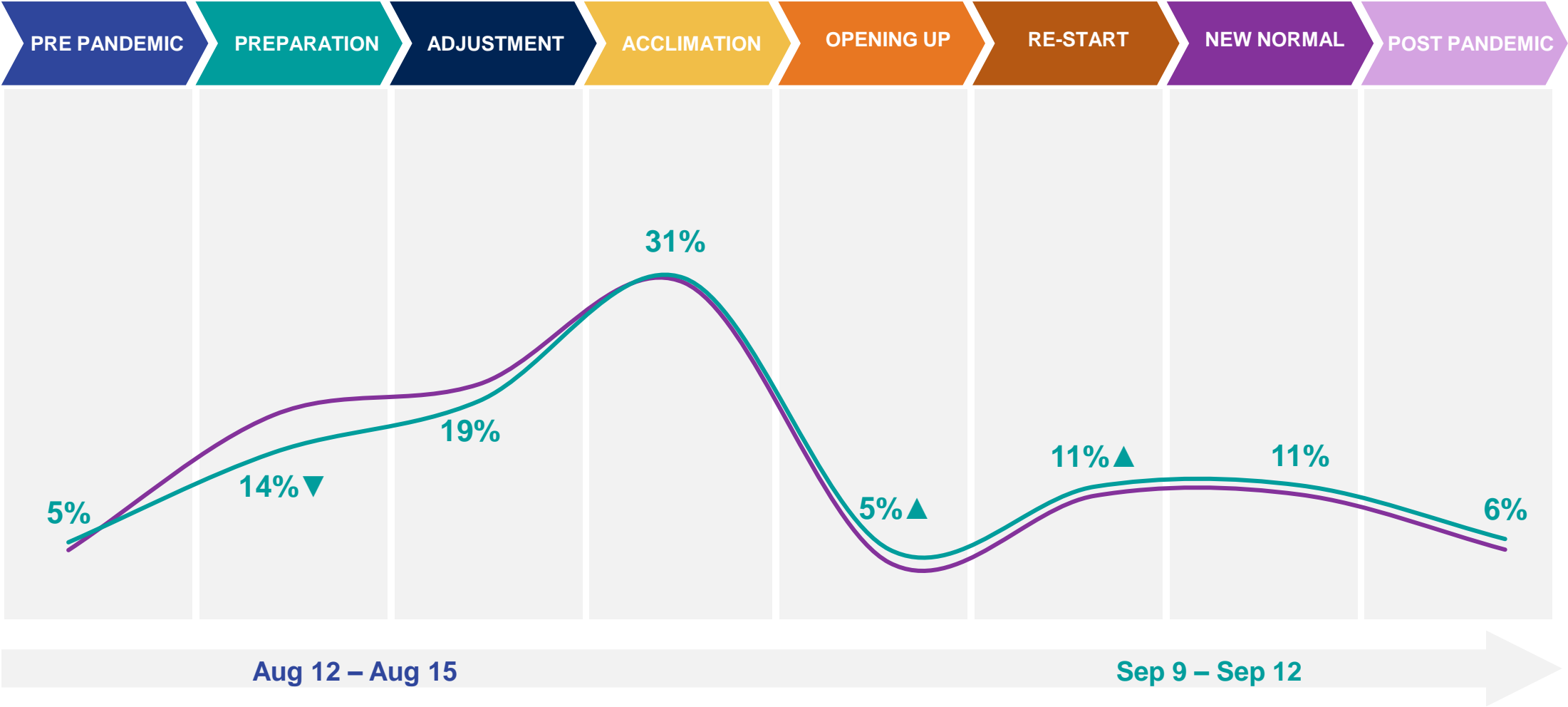
Tracking consumer attitudes and behavior in a time of crisis and adaptation

GAME CHANGERS



After weeks of regression, there are initial signs of **positive movement** along the phases of pandemic recovery

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

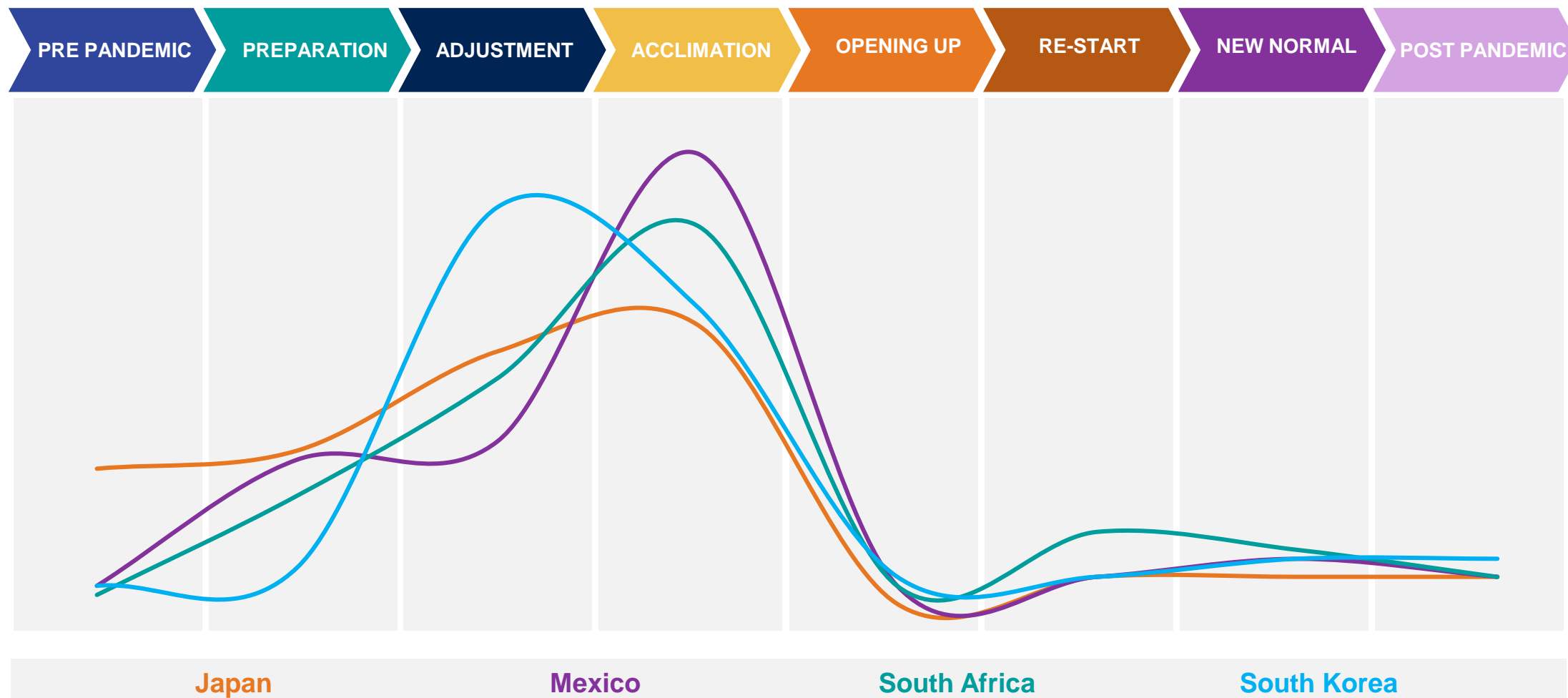


Q: Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?

Base: Aug 12 - Aug 15: 11504, Aug 26 - Aug 29: 11523, Sep 9 - Sep 12: 11507

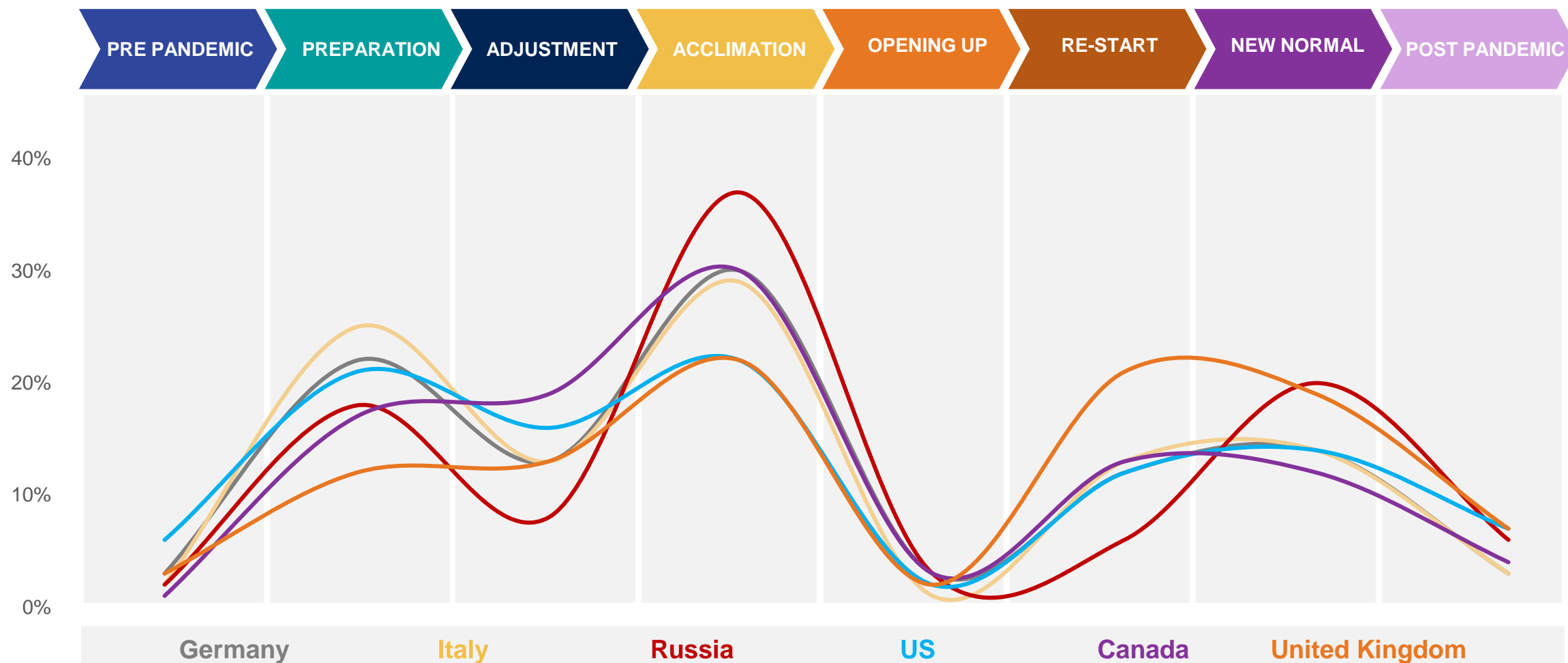
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

In these four countries, we see a more **uniform** adaptation – people are in a similar state of adjustment



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

In other countries, “recovery” is **divided** where some have moved on, some are coping, and others are preparing yet again



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

Divided around vaccines



“I was a bit hesitant to get the vaccine but what gave me the courage was when people close to me started booking appointments.”

– Muriel, France



“How weird is it that the government is pushing so much to get the vaccine? That does make me feel a little concerned.”

– Shanelle, US

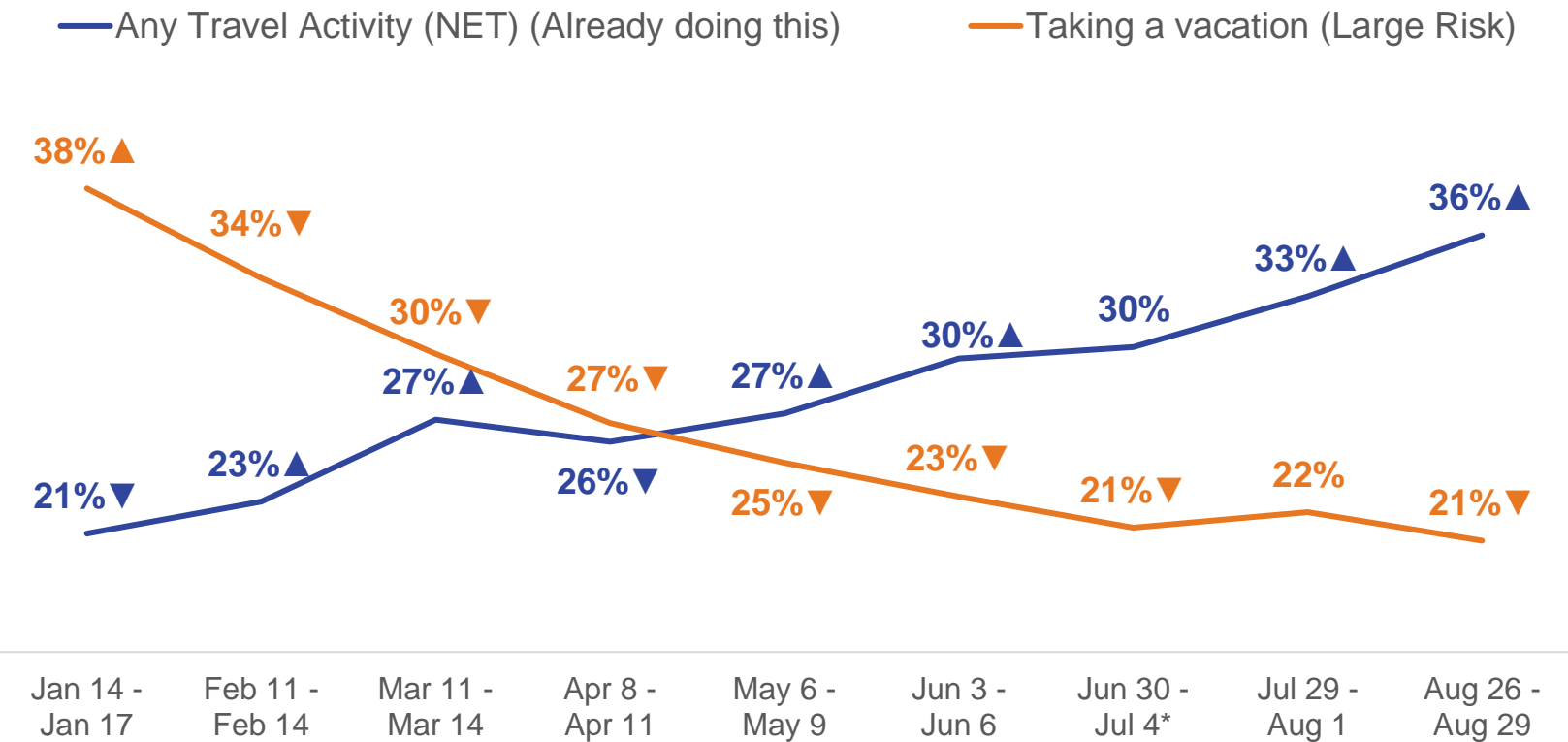


“I am worried that we can’t control the results of these vaccinations, and what we can’t control I don’t think we should try.”

– Amber, UK

Re-engagement with **travel** continues to grow as fewer consider travel to be a large risk

Perceived Risk vs. Participation in Travel Activities



*Note: Question text changed June 30 – July 4, 2021

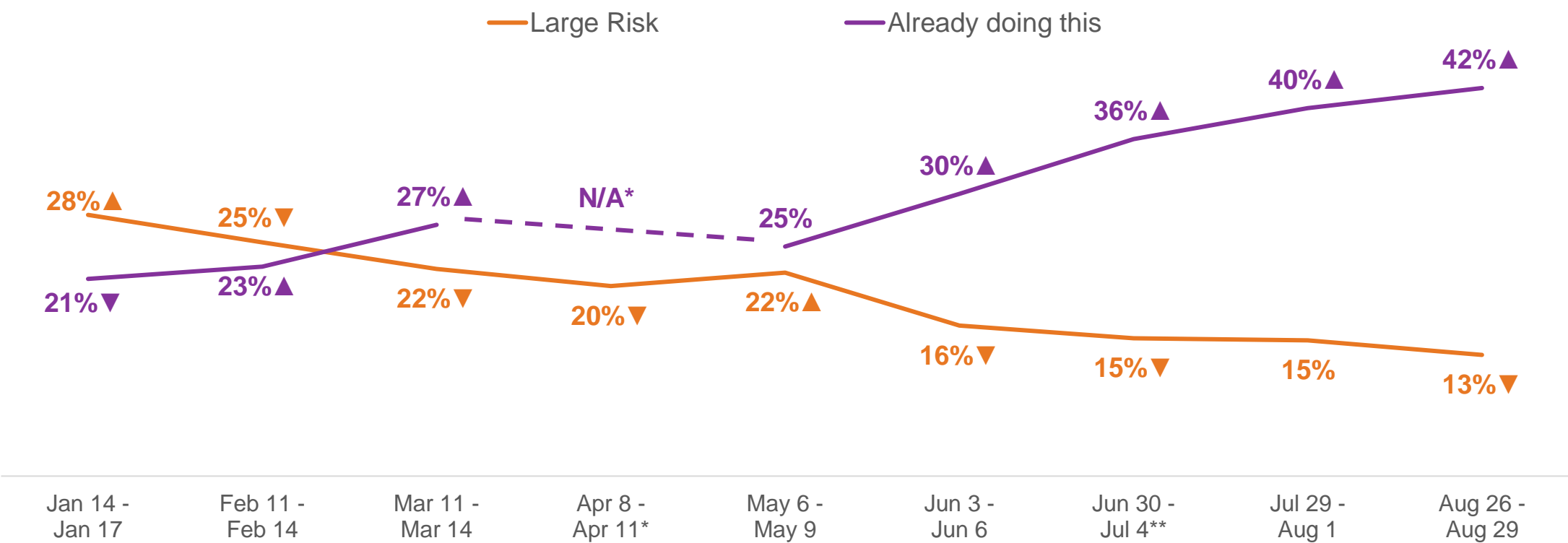
Q: For the following, when are you planning to do each of these activities again?
Q. How much of a risk to your health and well-being do you think the following activities are right now? Base: 11523
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

50%
Perceive air travel to another country as a large risk to their health and wellbeing

16%
Say taking a vacation feels entirely back to normal

As we saw with travel, indoor dining is on the rise as the risk seems more manageable

Perceived Risk and Participation in Dining Indoors at a Restaurant



*Dining indoors at a restaurant (Already doing this) was not asked Apr 8 – Apr 12, 2021

**Note: Question text changed June 29 – July 3, 2021

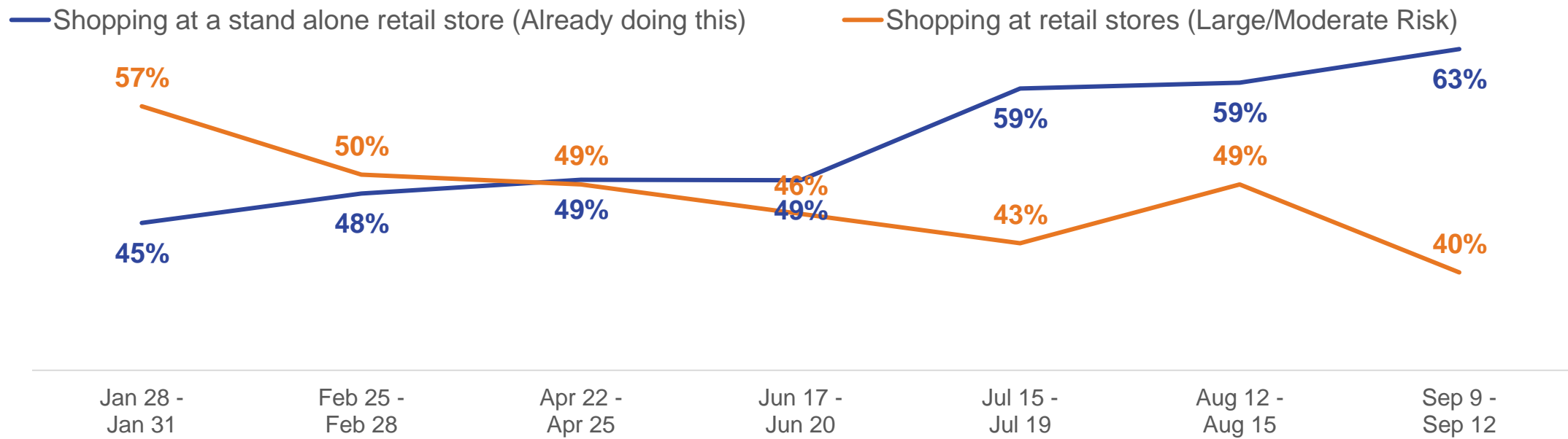
Q: (Large Risk) (Dining in at a restaurant) How much of a risk to your health and well-being do you think the following activities are right now?

Q: (Already doing this) (Dining Indoors at a Restaurant) For the following, when are you planning to do each of these activities again?

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

Shoppers are gaining confidence in returning to the store as the perceived risk is at an all-time low

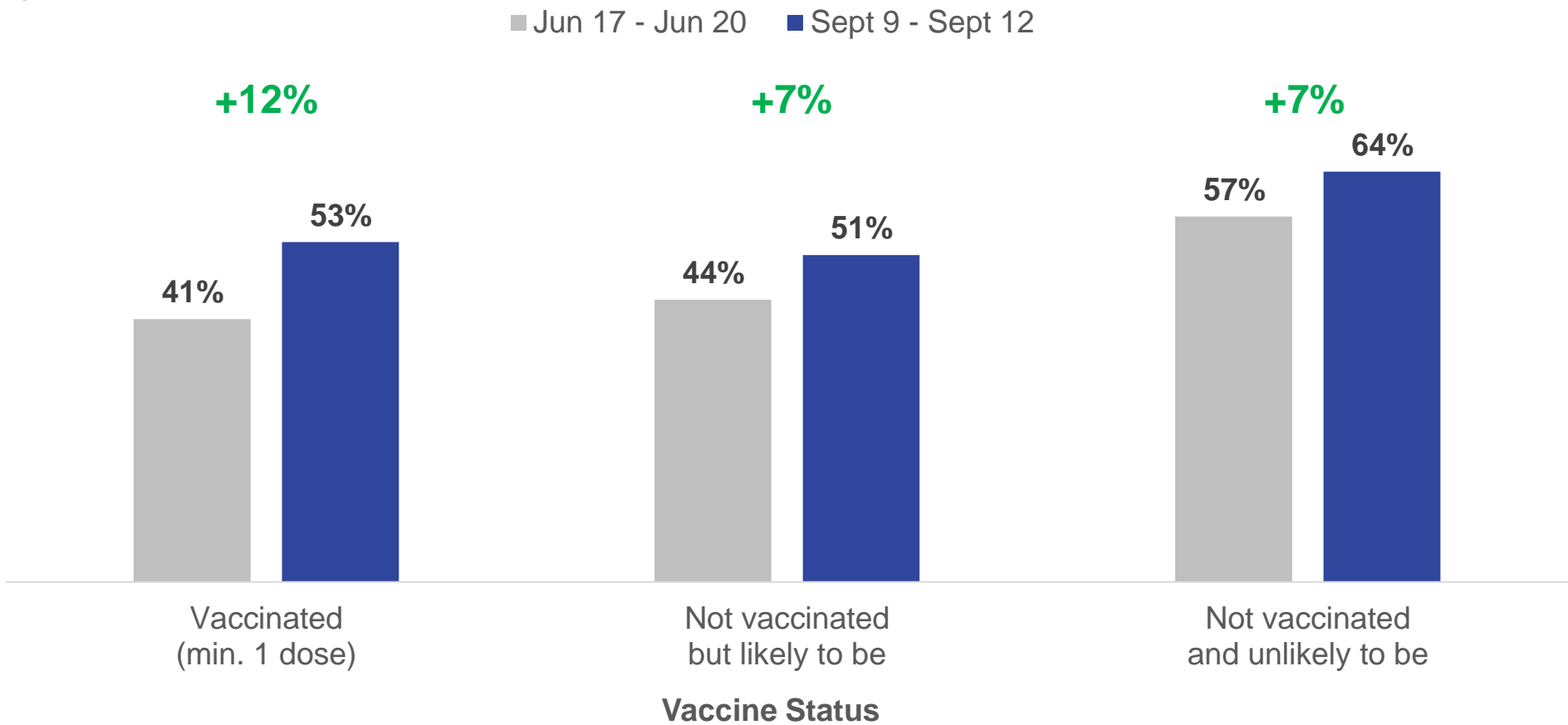
Perceived Risk vs. Participation in Shopping In-Store



Q: For the following, when are you planning to do each of these activities again? (I'm already doing this)
Q: How much of a risk to your health and well-being do you think the following activities are right now? (Large/Moderate Risk)
Base: 11507

Vaccinated citizens show the most growth with in-store shopping, but **those unwilling to vaccinate** continue to participate the most

Participation, indoor Shopping
(% Already doing this)

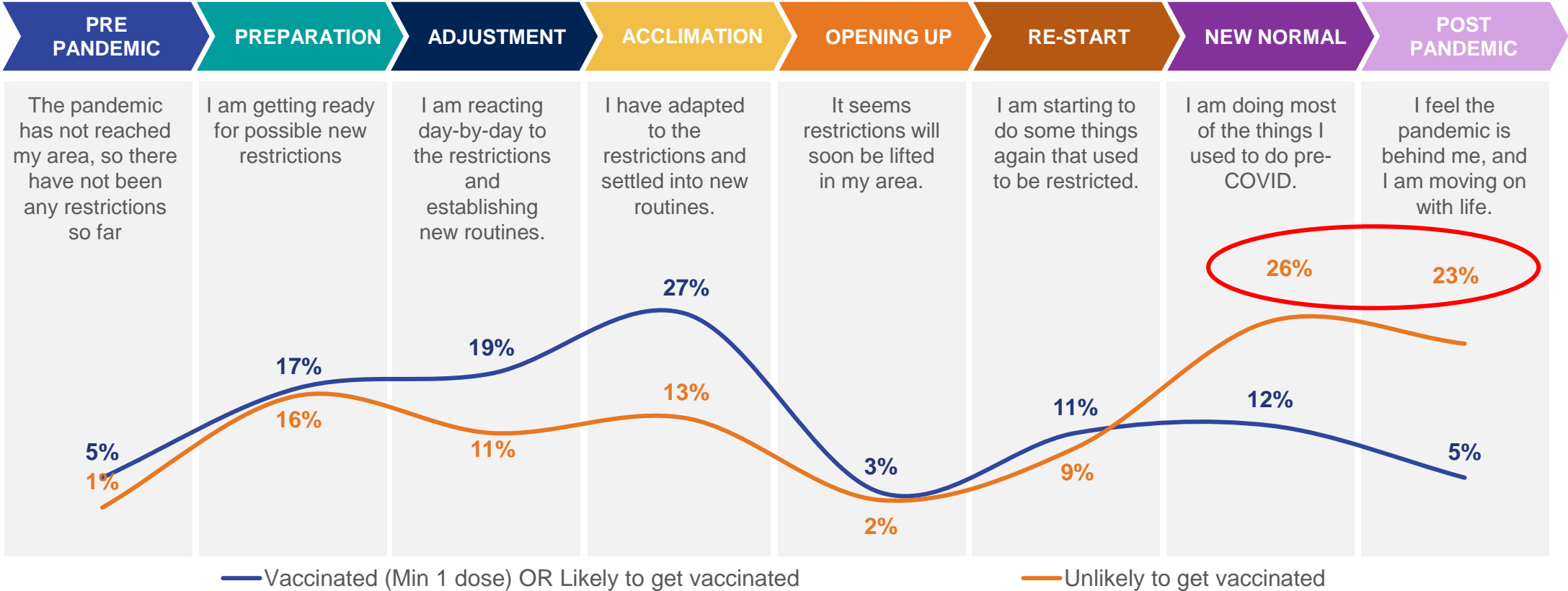


Q: For the following, when are you planning to do each of these activities again? (I'm already doing this)
Base: Vaccinated: 9202, Likely to be vaccinated: 1002, Unlikely to be vaccinated: 1303

In the USA, those who refuse the vaccine are almost 3x more likely to fully engage in pre-COVID activities than their vaccinated counterparts



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

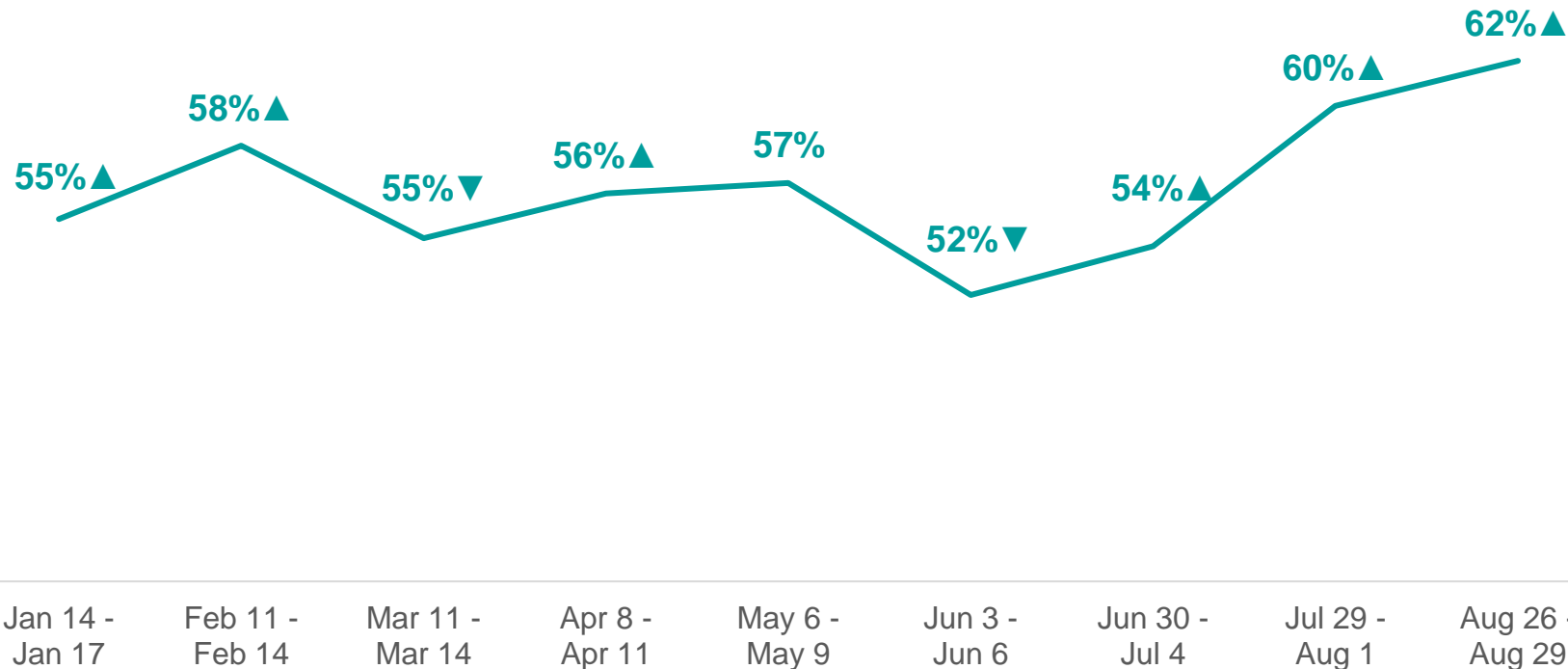


Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?
Base: Vaccinated or likely to get vaccinated: 833 Unlikely to be vaccinated: 167
▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)



The ebbs and flows of rolling waves and restrictions have left more people than ever feeling like “normal” is a long way away

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



“For now, I’m not going to crowded clubs.”

“We tend to opt for individual holidays, not with other families.”

“The attestation form for leaving the house reminds me of the lockdown.”

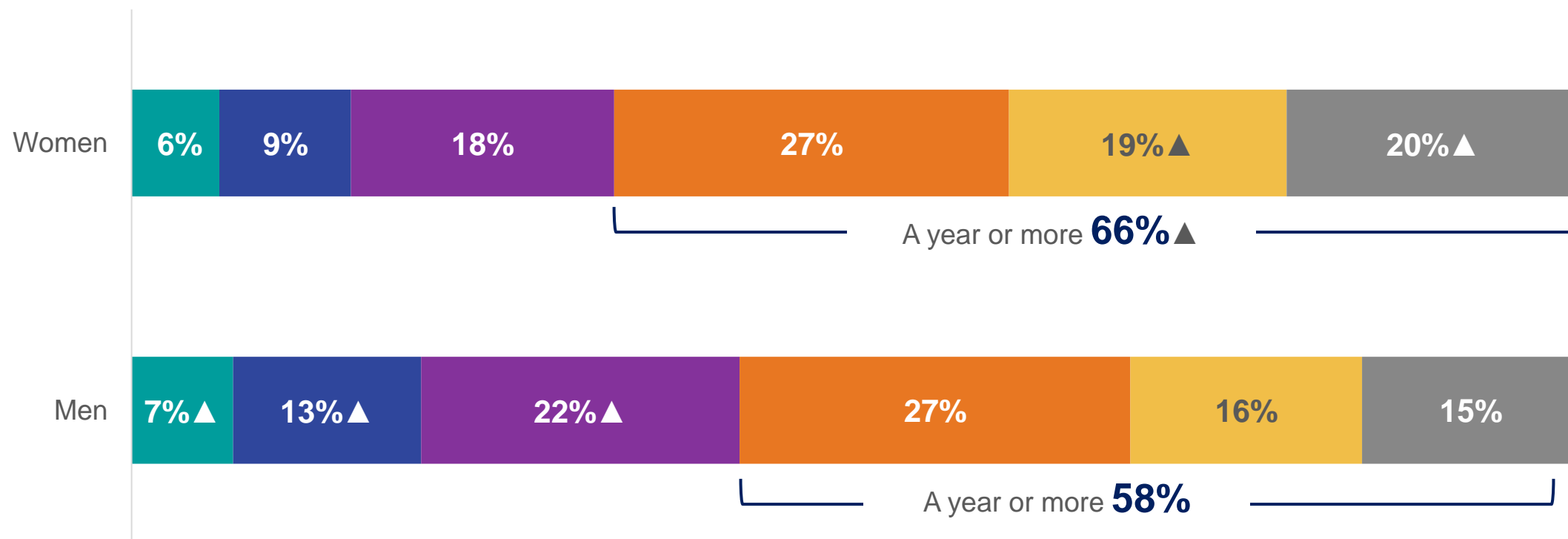
Q: How long do you think it will take before things feel like they are getting back to normal? Base: Aug 26 - Aug 29:11523

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

Women are more likely to have a distant view of normality

Timeline to Normalcy

■ Things feel normal to me now ■ Within 1-5 months ■ 6 months to a year ■ 1-2 years ■ Longer than 2 years ■ Never/I have no idea



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

Base: Women: 5980 Men: 5543

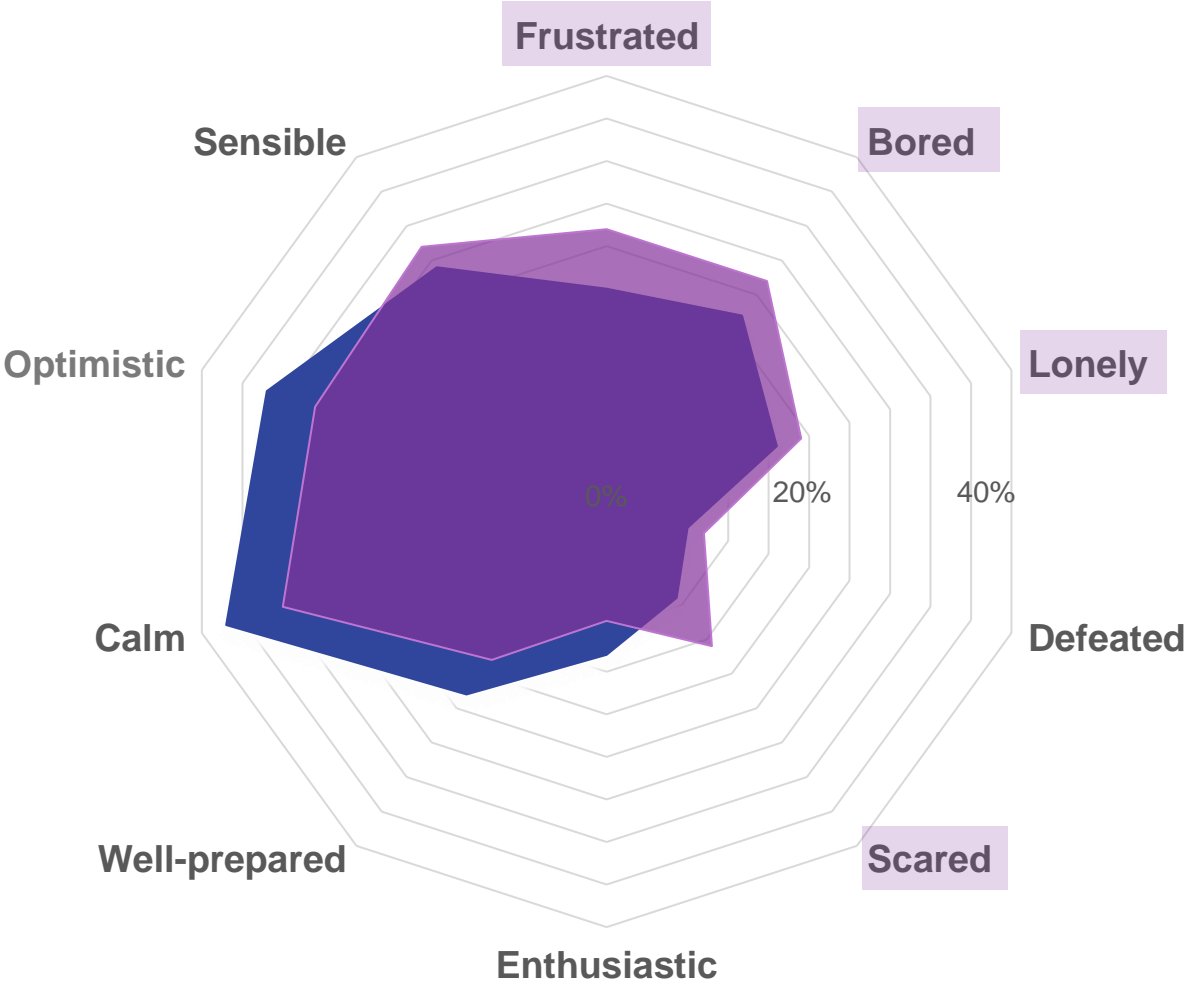
▼ or ▲ indicate significant difference versus other column (statistically significant @ 95% C.I.)

Women are also more likely to register frustration, boredom, loneliness and fear

Censydiam Emotions – State of Mind “Right Now”

Men

Women



Q: Which of these words describe your state of mind right now? Please select at least 3 and up to a maximum of 8 responses.
Base: 11523, Male: 5543, Female: 5980

**A year and a half
into the pandemic...**

**...where you stand
depends on where
you sit**

Recovery: Uniformity and Division

Countries are at different phases as they adapt – some with uniformity, others with division

Modest Steps on the Road to Recovery

More are venturing out to travel, dine and shop – although many find the experience far from normal

‘Normal’ Retreats into the Distance

2 in 3 women globally see the timeline to normalcy a year or more away

#2: WOMEN IN ADVERTISING

KEYS – A WEBINAR SERIES BY IPSOS

Jill Urlage

GAME CHANGERS



WOMEN IN ADVERTISING

**The power of
positive portrayal**

Presenter:

**Jill Urlage, VP, Global Products and
Innovation, Ipsos**

Download the white paper [here](#)



Shifting the social norm

76%

Agree that advertising has the power to shape how people see each other



Source: https://www.huffpost.com/entry/artist-gives-vintage-ads-a-feminist-makeover-by-swapping-gender-roles_n_5a60f7c9e4b01767e3d1a484
<http://www.elirezcallah.com/>

Ipsos inclusion of GEM®



#SEEHER

The Association of National Advertisers (ANA) launched the SeeHer movement in partnership with The FQ in 2016.

SeeHer's mission is to accurately portray all women and girls in marketing, advertising, media and entertainment so they see themselves as they truly are and in all their potential. To quantify results, they spearheaded the development of GEM®, the first data-driven methodology to identify gender bias in media.

This methodology is widely considered the gold standard for measuring gender equality in advertising and media. The global, open-source industry measurement has been used to address gender bias in 160,000+ ads, representing 87% of worldwide ad spend .

Source: SeeHer ANA



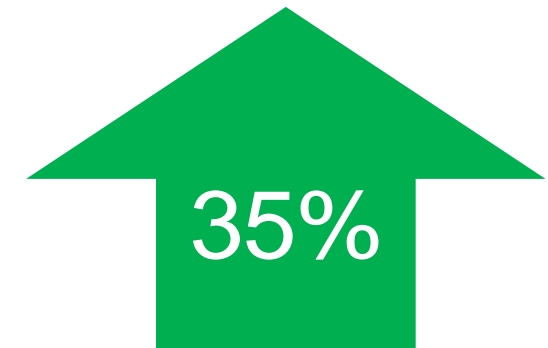
Positive portrayal of women is good for brand growth

Choice Intent



Having an effect with consumers at the point of purchase

Brand Relationship



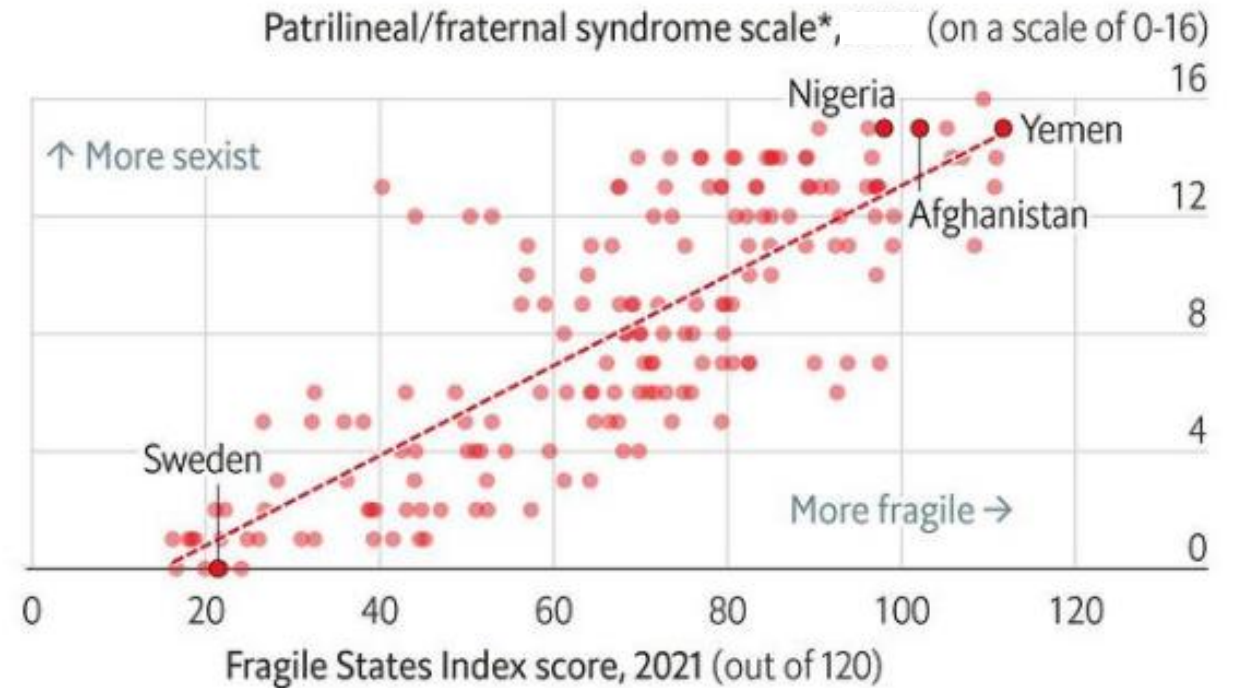
Consumers feelings towards the brand in the long term

Find out more in our paper titled "[Women In Advertising](#)"

Gender equality related to better country economy

The Economist shows there is a linear relationship between the treatment of women in a country and its economy

Many countries are still swayed by pre-modern attitudes to women



*Based on factors including unequal treatment of women in law, early marriage for girls, polygamy, bride price, son preference, violence against women and social attitudes towards it

Sources: Fund for Peace; Valerie Hudson, Texas A&M

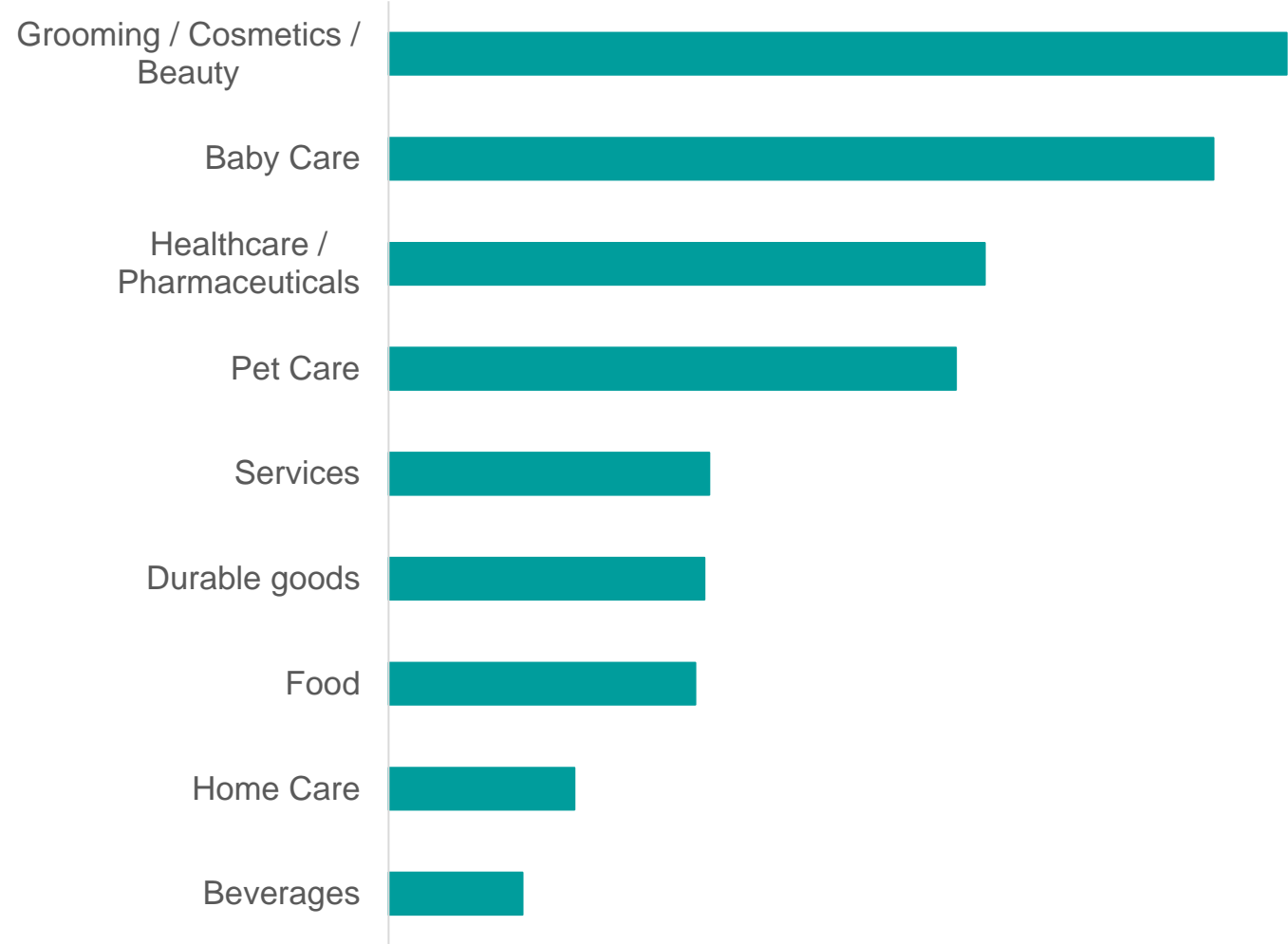
The Economist

Women are the primary decision makers across all categories, but positive ad portrayals remain uneven.

62%

Increase in sales for Dove since the launch of the “Real Beauty” Campaign

Top Third GEM Tertile Distribution by Category



Nike “What are girls made of?” ([Link](#))





Key Takeaways:

1

Positive portrayal of women is good for brand growth.

2

Gender equality is good for society.

3

Women have buying power, so all categories should present women in a positive manner.

4

Ipsos will continue to include GEM® in every creative assessment.

#3: DELIVERING ON PROMISES

KEYS – A WEBINAR SERIES BY IPSOS

Catherine Burton

GAME CHANGERS



DELIVERING ON PROMISES

Brand building through
customer experience

SEPTEMBER 2021

GAME CHANGERS



A SHIFTING FOCUS IN BRAND BUILDING TODAY

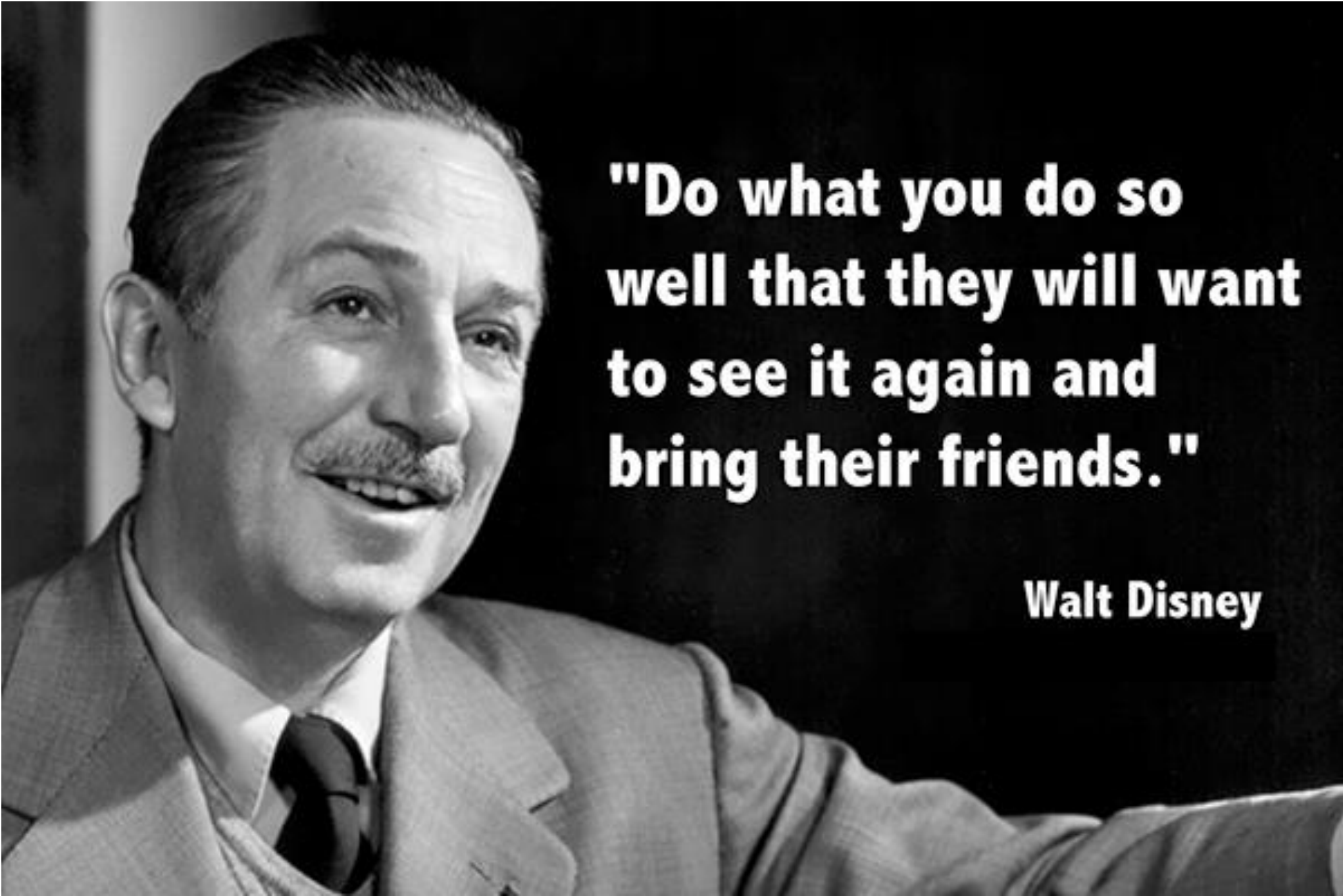
Brands are connecting with their customers through experiences



CUSTOMER EXPERIENCE IN DRIVING BUSINESS SUCCESS

A hot topic for marketers today



A black and white portrait of Walt Disney, smiling and looking slightly to the right. He is wearing a suit and tie. The background is dark.

**"Do what you do so
well that they will want
to see it again and
bring their friends."**

Walt Disney

DELIVERING TO YOUR CUSTOMERS

“**Do what you do** so well that they will want to see it again and bring their friends”

In a brand's control:

What the
brand says

What the
brand does

How customers
experience the
brand

Out of a brand's control:

What people
say and do



What other
brands say
and do



EXPERIENCE IS AN INCREASINGLY IMPORTANT DRIVER OF BRAND RELATIONSHIPS

“Do what you do so well that they will want to see it again and bring their friends”



SUCCESSFUL BRANDS ALIGN CX DELIVERY WITH BRAND PROMISE

“**Do what you do so well** that they will want to see it again and bring their friends”

What the
brand says

AND

What the
brand does

Must be aligned



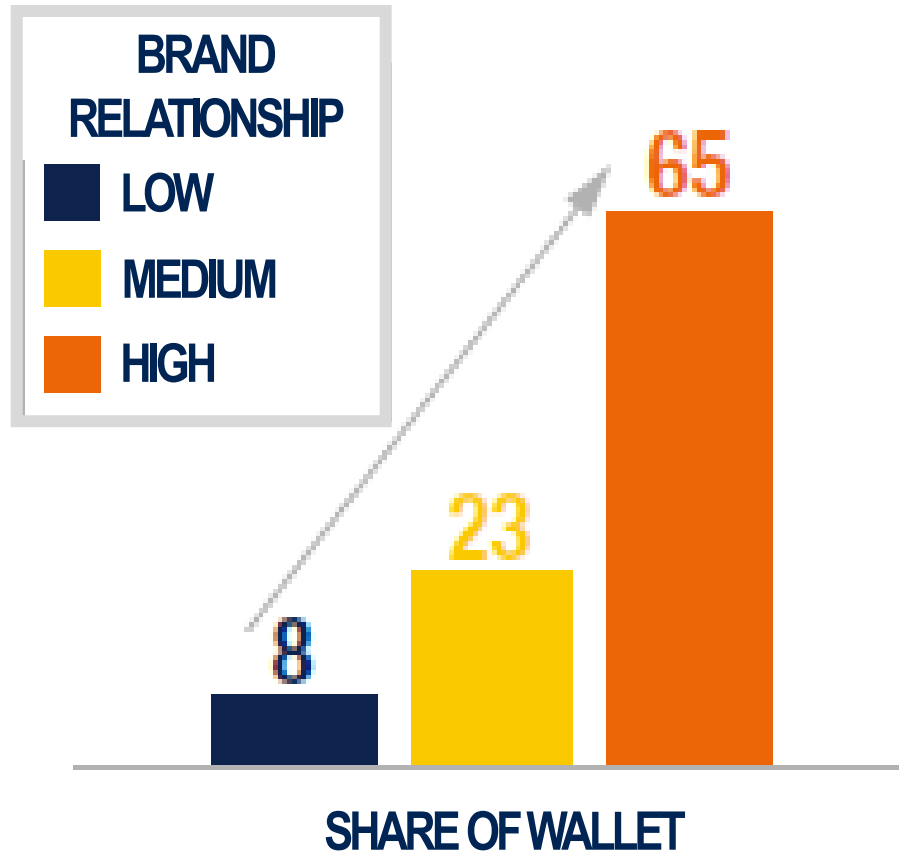
BUILDING STRONGER RELATIONSHIPS

“Do what you do so well that **they will want to see it again** and bring their friends”



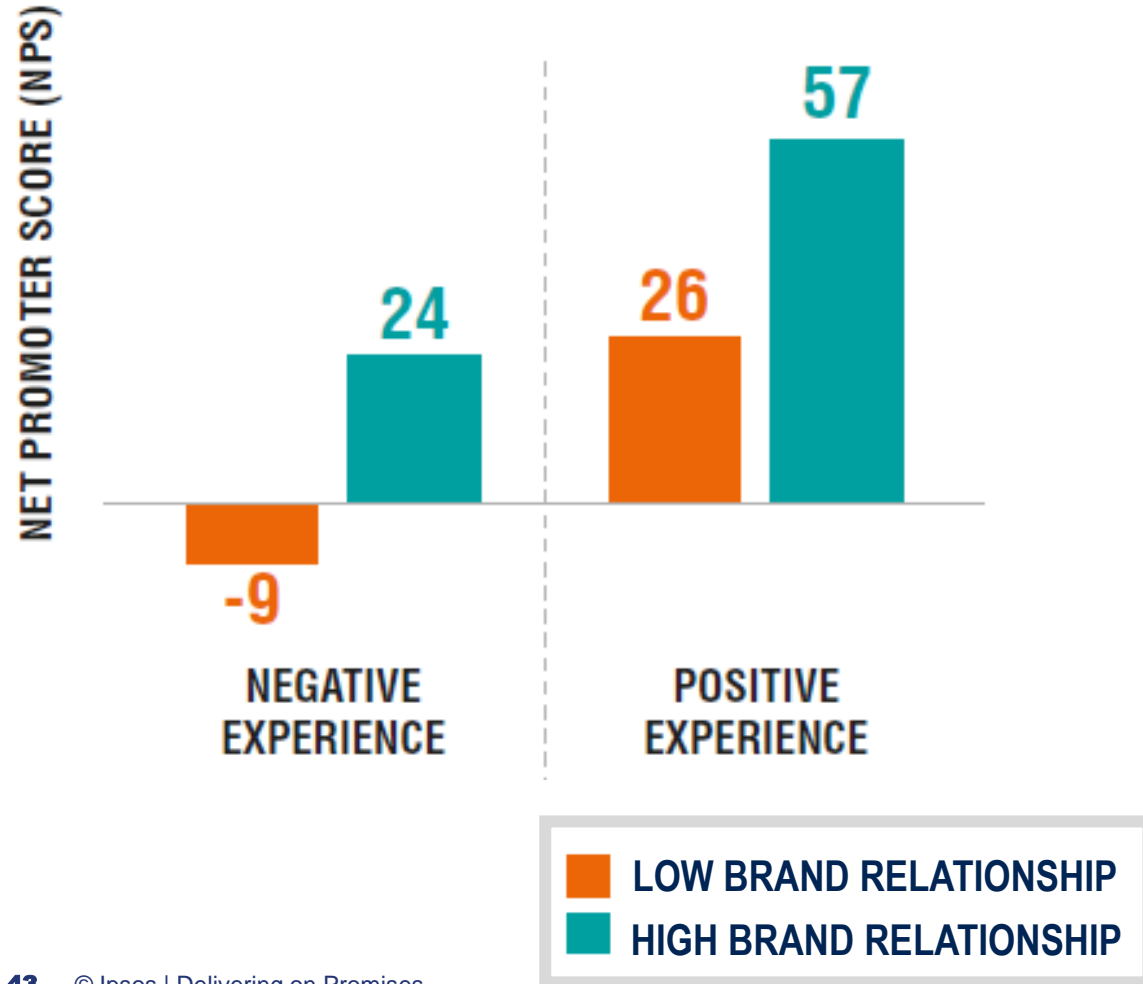
STRONG RELATIONSHIPS CREATE BRAND VALUE

High desire means increased revenues



STRONG RELATIONSHIPS ALSO INSULATE BRANDS

Committed customers are more forgiving



BRANDS GROW WHEN MORE PEOPLE BUY THE BRAND MORE OFTEN AND MORE EASILY

“Do what you do so well that they will want to see it again **and bring their friends**”

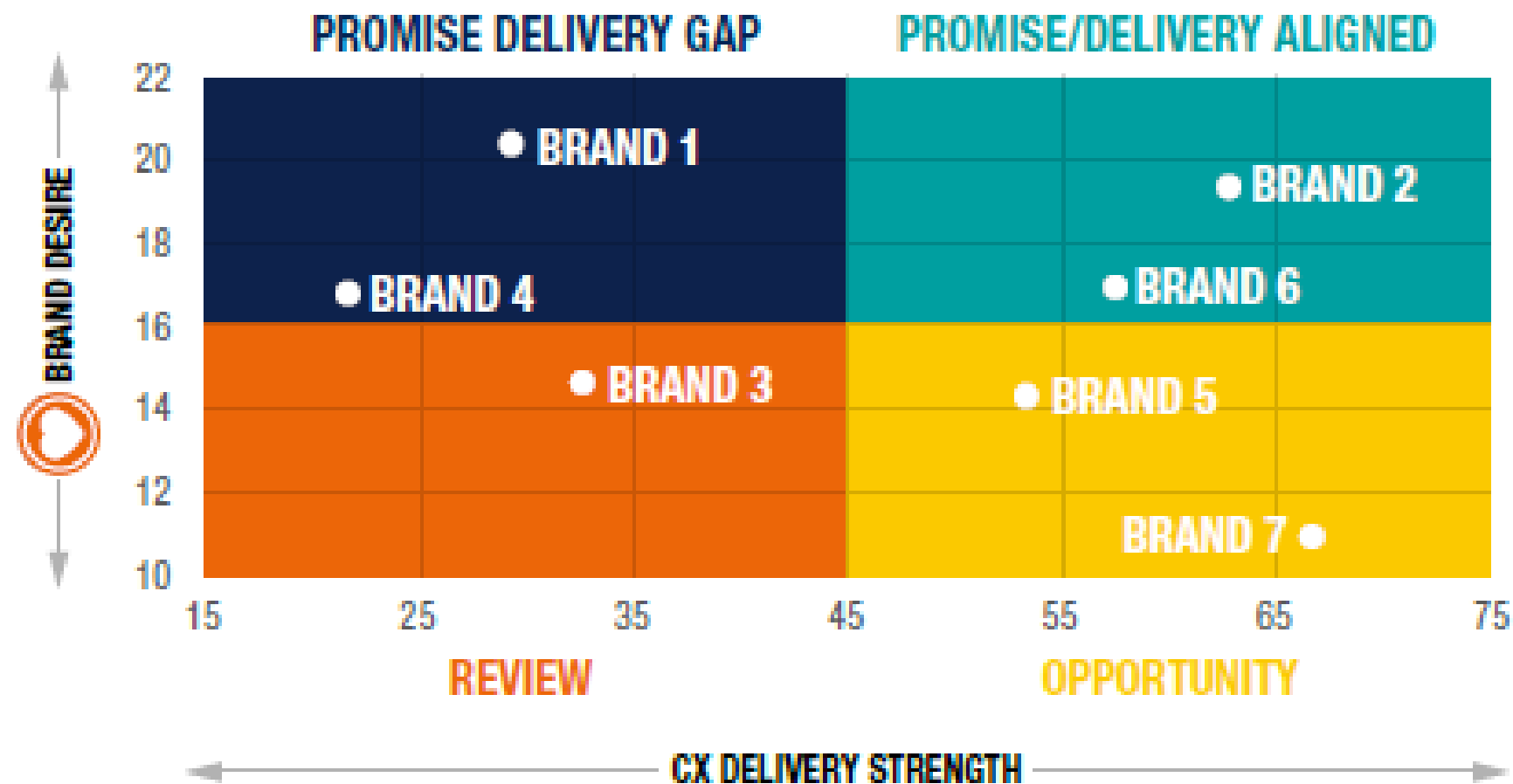


EXPERIENCE BEYOND THE TRANSACTIONAL

The Forces of Customer Experience



BRAND AND CUSTOMER EXPERIENCE PERFORMANCE MEASUREMENT IS CRUCIAL



HOT OFF THE PRESS

Our new paper is here!



#4: DRIVERS OF INFLUENCE

KEYS – A WEBINAR SERIES BY IPSOS

Cintia Lin

GAME CHANGERS





GAME CHANGERS

WOMEN AS TOP INFLUENCERS 2021 In Brazil





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Welcome to Brazil!



Skin Tones

Auto-declared
Black: 9,4%
Mulattos: 46,2%



211 MM
people

8.5 km²
Largest country in
Latin America

5 regions
with different
scenarios

Multicultural Country

Indigenous | Portuguese
Italian | African
Japanese | German
Spanish | And so many others...



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Diversity is in our DNA





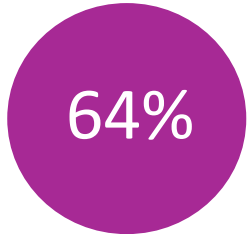
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Brazil today: The Pandemic Exposed Inequality

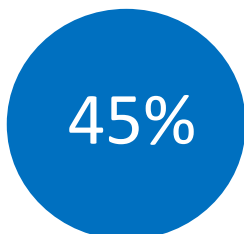
Types of inequality Brazilians think is the most serious in the country vs. Global Average

Income & Wealth



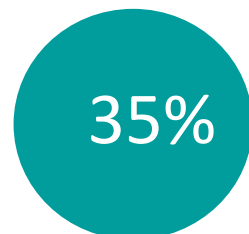
Global Av.: 61%

Racial or Ethnic



Global Av.: 30%

Gender



Global Av.: 29%



Source: Ipsos Global Study, 2021: Which three of the following types of inequality, if any, do you think is the most serious in your country?

Diversity debates have never been so important.

Feminicide increased in 14 out of 27 states in Brazil during the Pandemic scenario.



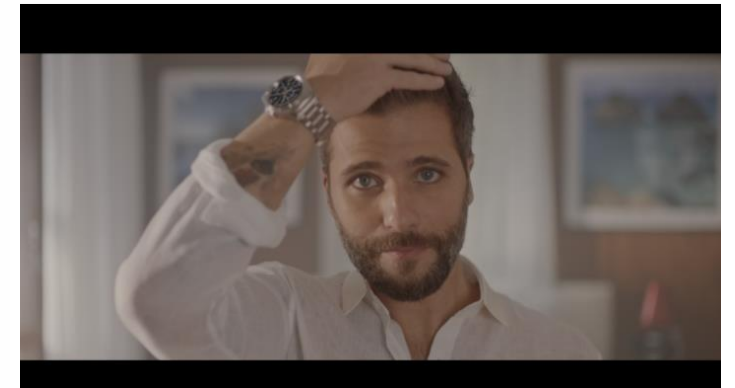
With social Isolation, Brazil registers 1 feminicide each 6 hours. "The Silence kills"

Pandemic raises the ethnicity inequality in the labor market.



Unemployment is higher among black people.

Lack of representation in Advertising reinforce stereotypes, sexism and racism in Brazil.



Technos Ad – 2017, Brazil



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77%

Expect that companies contribute to Society, more than in the past.

78%

Expect that companies invest more in causes than they used to invest in the past.

69%

Agree that: “I want to hear more about what brand and companies have to offer”



**Consumers demand
strong representatives
and speakers**

Source: Estudo Marketing Relacionado à Causa
– 1.200 entrevistas online com população
brasileira classes ABCDE – campo realizado em
Setembro/2019



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Celebrities and Influencers can play an important role in this context

Top 5 celebrities elected by audience: all women, 2 black women, 2 representing northeast, 2 embracing causes.

MOST
INFLUENTIAL
CELEBRITIES



2021

TOP
INFLUENCERS



1st: IZA



2nd: Gisele
Bundchen



3rd: Ivete
Sangalo



4th: Juliette
Freire



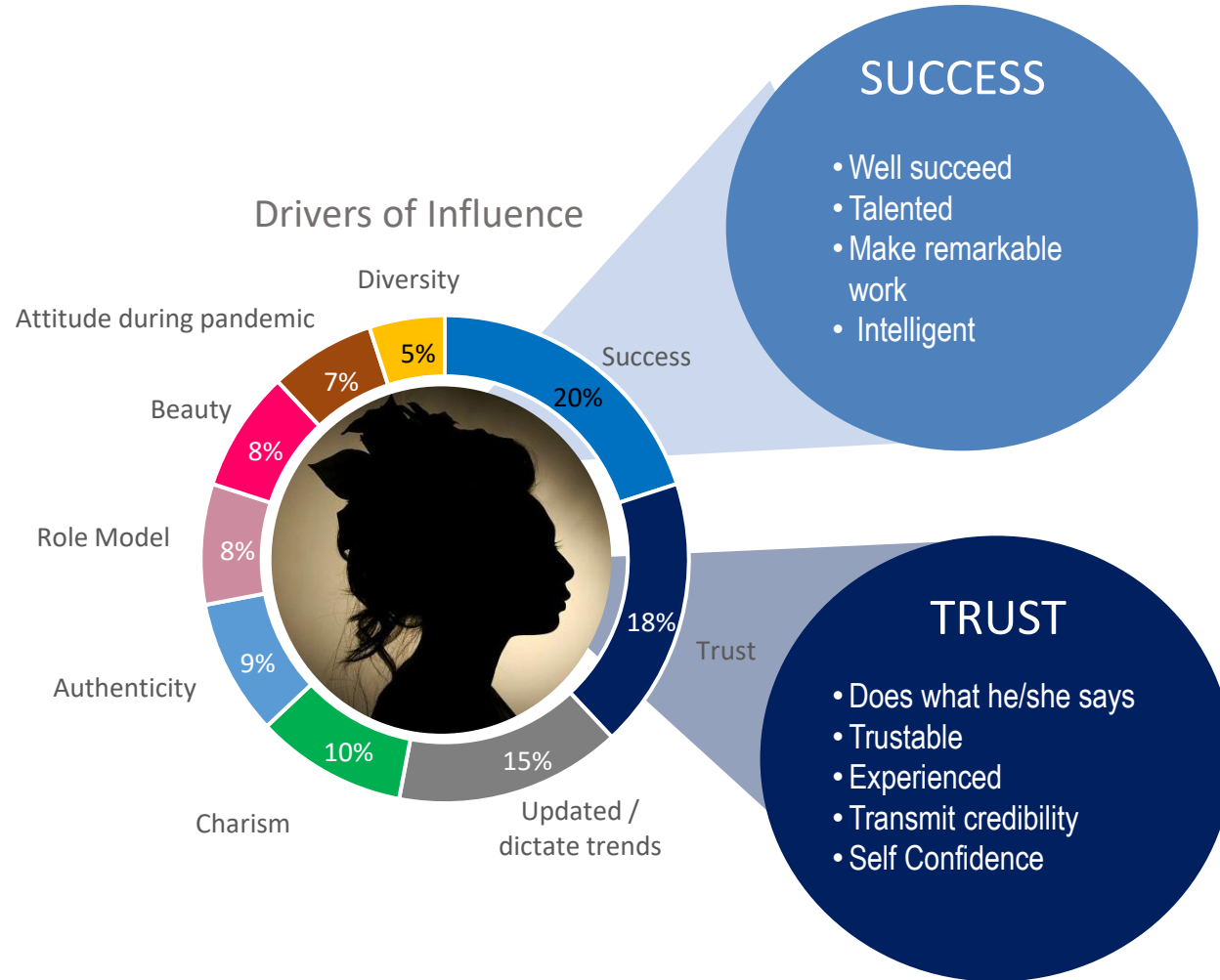
5th: Jéssica
Ellen





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POWER OF INFLUENCE

COMES FROM PERSONAL POSITIVE CHARACTERISTICS THAT MAKE THE PERSON TRUSTABLE TO SHARE AN IDEA AND IMPACT OPINIONS, CHANGES BEHAVIOR



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IZA AIMED THE SUCCESS TO HAVE A VOICE TO RACIAL AND WOMEN CAUSE



*"I didn't feel represented in the media, I couldn't see myself there or they showed me in roles they expected me to accept, **secondary roles.**"*

*"What makes me sign a contract is to understand that I am associating myself with a partner who is **coherent, correct and who values my story.**"*
(Talking about partnering with brands.)

*"It's really cool to see that, **with my work in music, I can also show who I am** to the point that a brand wants to relate to me.... "*



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JULIETTE GENERATED HIGH IDENTIFICATION WITH THE AUDIENCE AND A RECOGNITION TO NORTHEAST REGION

"Don't put yourself on the label they give you. Don't put yourself in the place they give you. Put yourself in the place you are."





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SUMMING UP

1. There is a **clear opportunity** for brands to make good use of celebrity influencers
2. Consumers are expecting brands, companies and celebrities' voices and attitudes to help them: **be relevant**
3. If you wish to understand how to better choose the representants/celebrities and/or influencers for the brand and/or company, we can send further info about the methodology and support you in this journey!



BRANDS CAN REALLY MAKE A DIFFERENCE!





GAME CHANGERS

THANK YOU!