



Ipsos Talks

# UNDERSTANDING THE CONSUMER CONTEXT & ACTING WITH EMPATHY

Wednesday, 3 April 2024, 11 AM @ Ascott BGC

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## MESSAGE FROM THE COUNTRY MANAGER

### VICKY ABAD

IPSOS IN THE PHILIPPINES

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<https://www.linkedin.com/in/vicky-v-abad-7b10881a/>



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1 of 3

## MESSAGE FROM THE COUNTRY MANAGER

Good afternoon. Getting a bit of help from Ipsos Facto, our very own generative AI platform would have made my task today a bit easier, I guess. But this time, I went for the old-fashioned way, so here it goes.

Blessed Easter to all of you and thank you for sharing your time this afternoon with Team Ipsos in the Philippines. In the 3 years I've been with Ipsos - culminating a Market Research career that spans over 3 decades now - I've grown to truly understand what I heard many say before - that Ipsos is an MR company OF Market Researchers, founded BY Market Researchers FOR Market Researchers.

We have deep roots in the total understanding of society at large, markets where many of your brands compete and people that we see not just as consumers, but also as customers, shoppers, viewers, voters and citizens. And I can confidently say that it is a company with a rich heritage of curiosity & expertise in our field as well as a promising future of progress & growth that we are all excited to partake of.

We are independent and committed to strong core values that make us all proud to be Ipsos—and we are also turning 50 as a global company next year!

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## MESSAGE FROM THE COUNTRY MANAGER

This Client event where we will seek to - Better understand our Consumers' context with the aim of Acting with genuine Empathy - is Ipsos way of finally, boldly amplifying our voice in the broader Market Research & Business consultancy industries.

We'd like for you, our Clients, to get to know us a little bit more, a little bit better after today.

We hope to leave behind impressions that will help you see us more as true Experts & advisors.,

Dynamic & Innovative in our thinking & approach and more importantly, Agile & Creative in our delivery - raising your expectations of Ipsos and what we can bring to the table.

This afternoon is also largely going to be a thanksgiving to Clients that we engage and work with today.

We are grateful for the opportunity you have given Ipsos to work alongside you in the pursuit of growth for your brands and markets.

You have trusted us with your business challenges and have shared your business goals with us, growing together as comrades in various marketing arenas.

In many of our meetings - virtual, face to face or a mix of both, we are happy to have built personal connections that elevate our empathy to your world to create meaningful conversations with you.

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## MESSAGE FROM THE COUNTRY MANAGER

We continue to live in uncertain times – dealing with what we have now called as a time of polycrisis. A time when we will all have new challenges to overcome. I hope that our shared journey will make it more worthwhile – as we learn from each other's expertise & grow from each other's learnings along the way.

So – as I have said to the Ipsos team members here with you today – share this time with our clients, enjoy the conversations and just have a fun learning experience. I wish the same for all of you.

Anna, our Client Officer, has put together a great line-up of insight sharing from Ipsos' senior leaders on what we see as the most relevant drivers of brand success today. We will also be joined by very special guests to complete our roster of presenters & topics for you. And after the presentations, we will make time for some Q&A engagement to facilitate clarifications & further sharing of ideas. Together, I hope, our program will enliven the rest of our afternoon.

Once again, thank you all for coming today.

Welcome and good day!

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Ipsos Talks

# UNDERSTANDING THE CONSUMER CONTEXT & ACTING WITH EMPATHY

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## What we are going to learn today

- 1** The Brand Success framework
- 2** The Philippine consumer sentiments
- 3** How the ESG context affects our consumers
- 4** Bringing a culture of empathy

## KEYNOTE EMMANUEL PROBST

GLOBAL LEAD FOR BRAND THOUGHT LEADERSHIP  
IPSOS

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<https://www.linkedin.com/in/emmanuelprobst/>



## Ipsos provides you with a total understanding of society, markets, and people

- Ipsos is your trusted **Measurement partner**
- Supports and informs your **brand strategy**
- Brings you industry-leading **innovations such as AI-enabled solutions**



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**GREAT BRANDS  
SHAPE EXPECTATIONS  
THROUGH EMPATHY  
FOR PEOPLE AND THE  
CONTEXT OF THE WORLD  
AROUND THEM**



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## People challenge brands

→ Cadbury backpedaled after initiatives **backfired** at people's reactions.



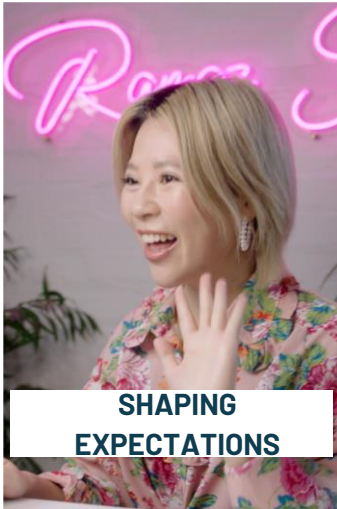
→ Vaseline **breaks through** on TikTok, thanks to "slugging"



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**GREAT BRANDS SHAPE EXPECTATIONS THROUGH EMPATHY FOR PEOPLE AND THE CONTEXT OF THE WORLD AROUND THEM**

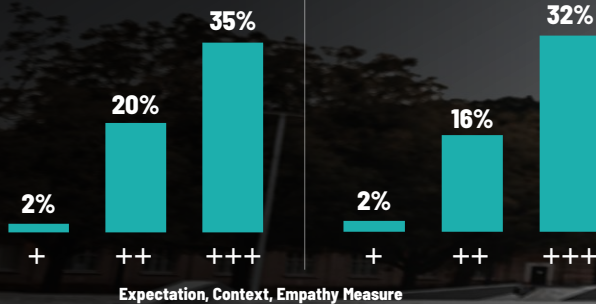


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**Brands that score higher on expectations, context and empathy capture higher purchase share**

Pain Relief

Sparkling Water



Ipsos R&D: Analgesics / Sparkling Water US. Survey data combined with Household Panel Data

© Ipsos | Brand Success



# CONTEXT /

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## What do we mean by shaping expectations?

**What people feel and know about the brand and category**

All of the expectations people have about brands including



**Sensorial**



**Functional /  
Emotional**

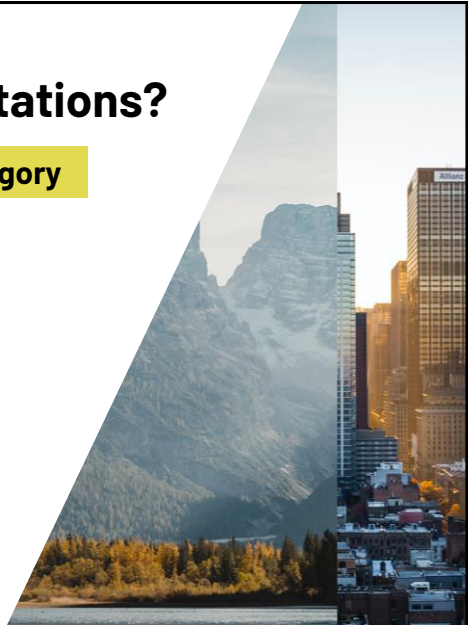


**Social**



**Buying**

Based on the emerging science around the brain as a prediction machine



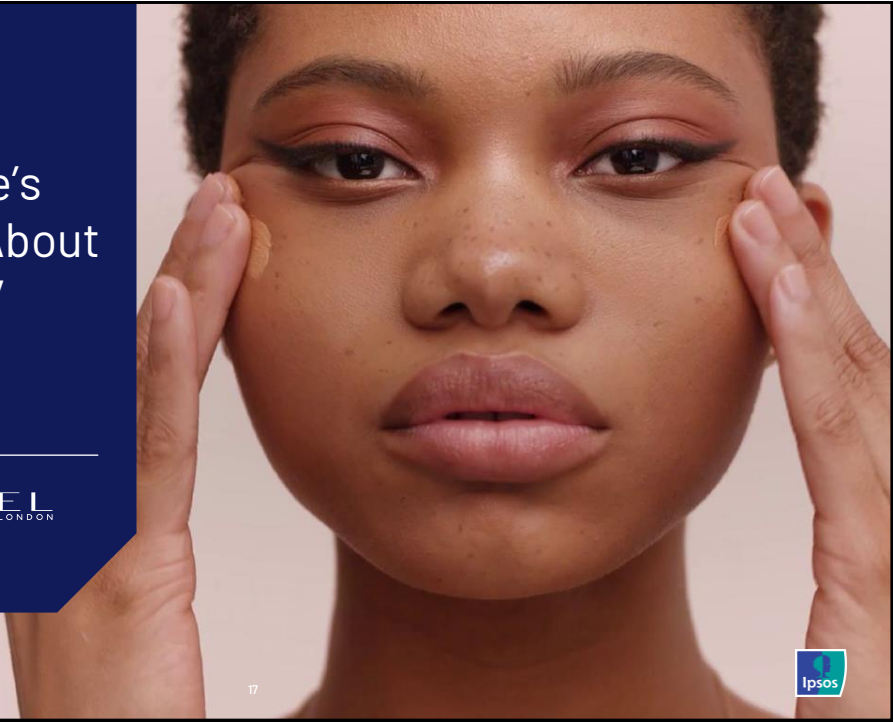
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## Shaping People's Expectations About "Clean Beauty"

COTY RIMMEL LONDON



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Shopee

- ✓ Convenience
- ✓ Frequent sales, promos and cashbacks
- ✓ No minimum spend
- ✓ Free delivery



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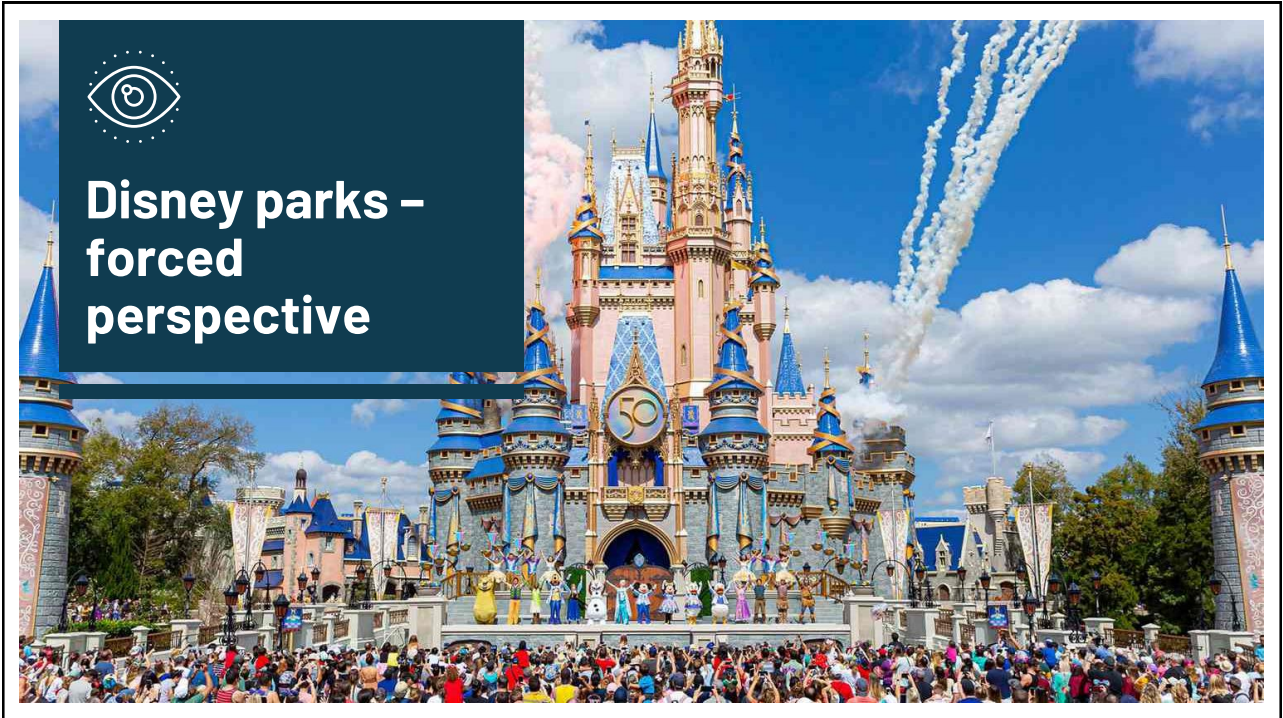


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## What do we mean by context?

Is what is happening in people's lives and the world around them

2 broad types of context:



### Macro

societal and cultural values, norms, and prevalent issues, topics and themes



### Micro

The occasions in which people are choosing brands

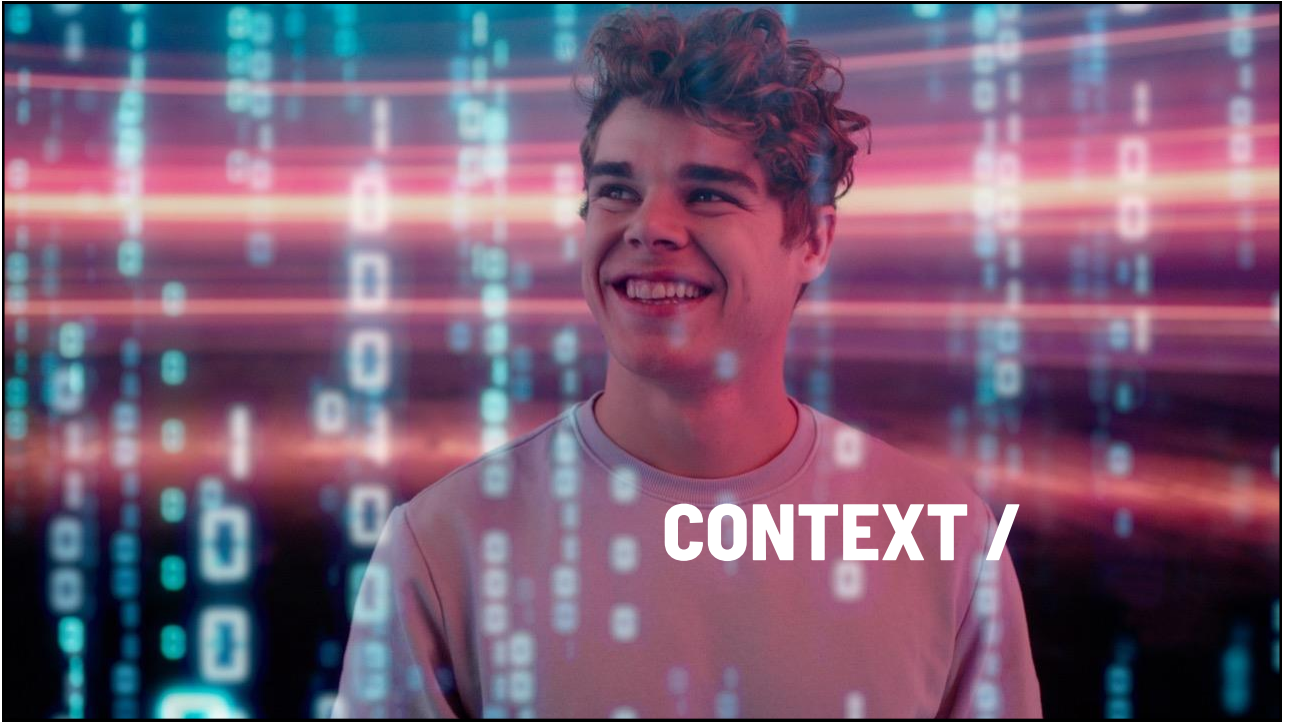
- Logistics: where, when, with whom
- Needs to satisfy which needs, to solve which problems



## Grab aims to bring more women drivers on board





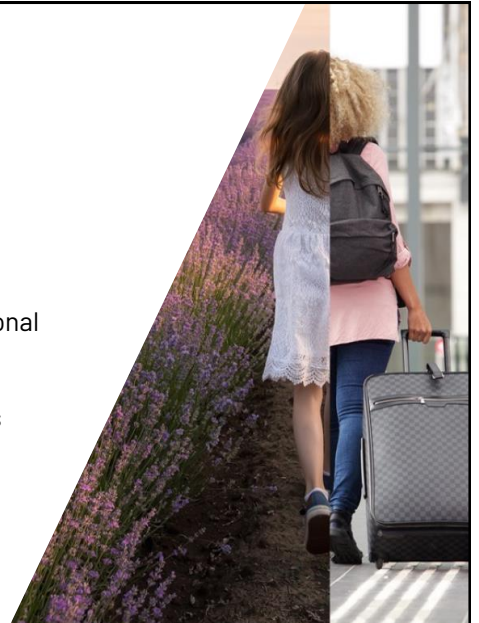


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## What do we mean by empathy?

**Is to understand what's important to people,  
and how brands can add to their lives**

- Empathy aims for a total understanding of people, their personal context, needs and expectations
- Brands need to be empathetic in order to shape expectations



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#MyKwentongJollibee

**30 DATES**  
A True Story  
Directed by: Paolo Villaluna

#MyKwentongJollibee

**TO LOVE AGAIN**  
A True Story  
Directed by: Paolo Villaluna

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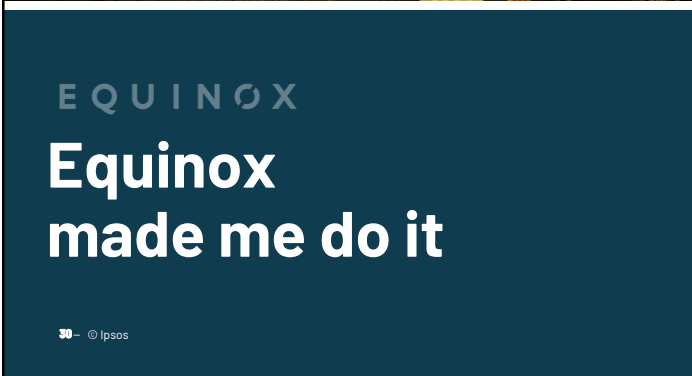
**IT'S ALL ABOUT ME**

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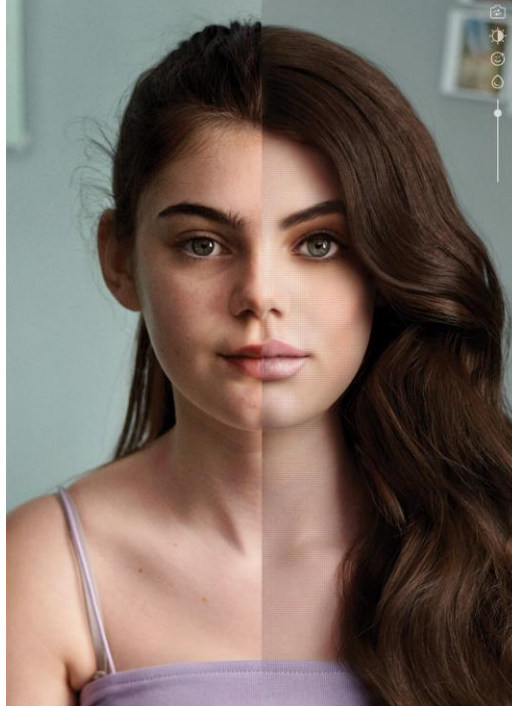
**LAMANGANG  
MAY TAPANG**  
SA ONE GINEBRA NATION

18 Drink responsibly. ASC No. XXXXXXXXXXXX

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31




*Dove*

**The Dove  
reverse  
selfie  
project**

Retouching her face also crops her confidence.

This is a representation of how far retouching apps can distort beauty. Harmful and readily available, 80% of girls are already using them by the age of 13. It's no wonder their perception of beauty and their self-esteem are so distorted. Help reverse the damage. Download our new Social Media Confidence Kit. [Dove.com/confidence](https://Dove.com/confidence)

*Dove*  
Self-esteem project

Let's **Change** Beauty 

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## We Seek Reassurance About Our Past, Present and Future

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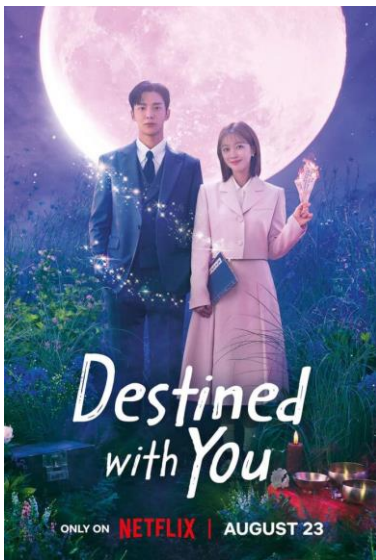
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## Friends, the depiction of timeless and effortless friendships



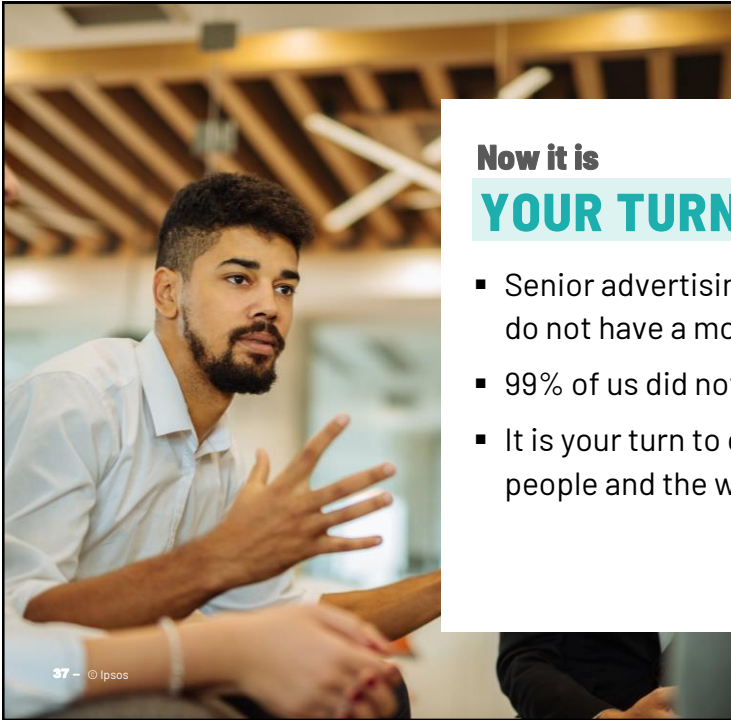
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## K-Dramas focus on human psyche and emotions



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Now it is

## YOUR TURN

- Senior advertising executives and creative directors do not have a monopoly on great marketing
- 99% of us did not go to the top 1% of schools
- It is your turn to create brands that transform people and the world we live in

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SERVICE LINE LEADER  
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<https://www.linkedin.com/in/athena-ilagan-66032414/>

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# A GLIMPSE OF PHILIPPINE CONSUMER SENTIMENTS

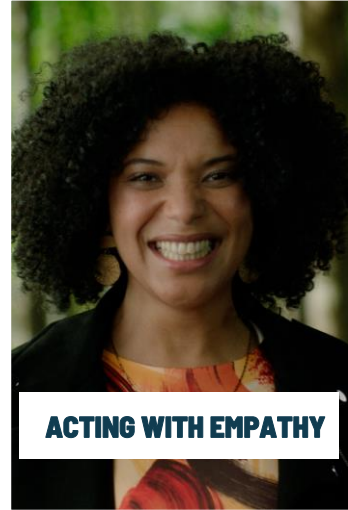
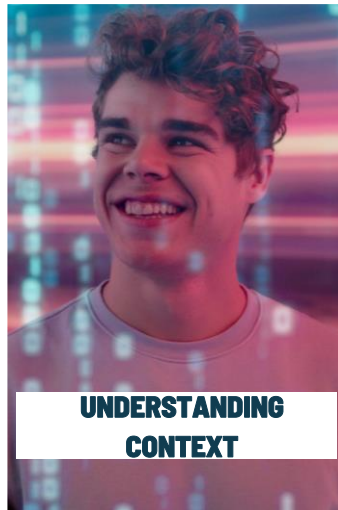
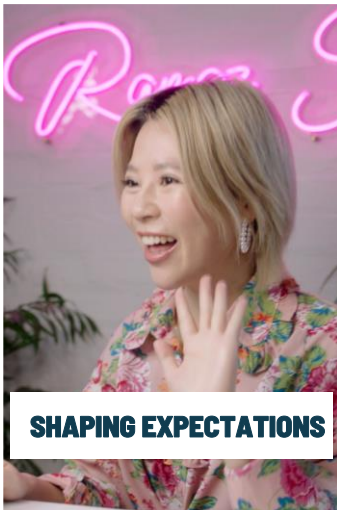
Athena Ilagan

© Ipsos | Doc Name | Month Year |  
Version # | Pub. Date | Project # | Client  
Name | Only for Internal Use | Confidential



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**GREAT BRANDS SHAPE EXPECTATIONS THROUGH EMPATHY FOR PEOPLE AND THE CONTEXT OF THE WORLD AROUND THEM**



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## Let's recall one of the core themes discussed earlier...

### What do we mean by context?

Is what is happening in people's lives and the world around them

2 broad types of context:



#### Macro

societal and cultural values, norms, and prevalent issues, topics and themes



#### Micro

The occasions in which people are choosing brands

- Logistics: where, when, with whom
- Needs to satisfy which needs, to solve which problems



## Ipsos has identified six global Macro Forces



**WITH MACRO FORCES AS OUR BACKDROP, CONSUMER SENTIMENTS ARE AFFECTED.**



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**66%**

Say "2023 was a bad year for my country", compared to Global Ave of 70%

**59%**

Say "2023 was a bad year for me and my family", compared to Global Ave of 53%

## Remembering 2023



GOVPH Home About NEDA Focus Areas Resources Transparency Contact

**PH RECORDS LOWEST INFLATION RATE IN 2023, GOV'T TO CONTINUE MEASURES TO PROTECT FILIPINO PURCHASING POWER – NEDA**

Last modified on January 5, 2024

5 min 0 min

**JANUARY 6, 2024** – As the country's inflation rate settled to its lowest level in 2023 last December, the National Economic and Development Authority (NEDA) assured the public that the government is continuously monitoring prices and inflation risks and implementing measures to protect the purchasing power of Filipino households.

The Philippine Statistics Authority reported today that inflation for December 2023 further slowed down to 3.9 percent from 4.1 percent in November 2023, bringing the full-year average inflation rate to 6.0 percent.



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## Well-rounded Well-being



**62%** <sup>48%</sup>

Think it is likely that there will be a new global pandemic caused by a new virus.

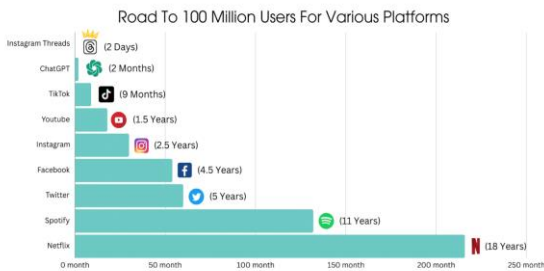
**1 in 8**

people globally live with a mental health disorder<sup>7</sup>

## Growing mental health crisis



**SILENT EPIDEMIC.** Philippine Mental Health Association (PMHA) holds a World Mental Health Day event in Cagayan de Oro City on Monday (Oct. 9, 2023). The PMHA called for stronger and more localized mental health responses to address the “silent epidemic” of mental health crisis. (Photo courtesy of PMHA)



## Tech-celeration

### TECHNOLOGY



**73%** <sup>64%</sup>

Expect AI will lead to many jobs being lost (in their country) in 2024

**60%** <sup>56%</sup>

Expect Doctors (in their country) to regularly use AI to decide on treatments in 2024

## Toll of technology



**56%**  
41%

Will use social media less

**64%** <sup>55%</sup>

Expect their personal data will be leaked on the internet in 2024



# Inequalities and Opportunity

## ECONOMY



Expectations are for the economy to worsen in 2024. Large numbers expect the following to rise:



## FILIPINO INCOME GROUPS and HOW MUCH THEY'RE EARNING

INCOME GROUP	RANGE OF MONTHLY FAMILY INCOMES <small>(For a family size of five members) IN 2021 PRICES</small>
POOR	Less than P12,030 per month
LOW INCOME (BUT NOT POOR)	Between P12,030 to P24,060 per month
LOWER MIDDLE INCOME	Between P24,060 to P48,120 per month
MIDDLE MIDDLE CLASS	Between P48,120 to P84,210 per month
UPPER MIDDLE INCOME	Between P84,210 to P144,360 per month
UPPER INCOME (BUT NOT RICH)	Between P144,360 to P240,600
RICH	At least P240,600

life

## Generational wealth disparities



Millennials are likely to be poorer than Gen X and baby boomers were at the same age.

## Over-development



Photo courtesy of Facebook.com/Clubmanila20

## Environmental Emergencies

### ENVIRONMENT



**77%** 71%

Expect that there will be more extreme weather events in 2024



**67%** 51%

Expect that a natural disaster will hit a major city in their country in 2024

# Society in Flux

SOCIETY

**79%** **48%**

Think women will be paid the same as men for the same work

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XX% PH Data  
XX% Global Ave

Identity fluidity

Ageing populations



## Starbucks sorry for signage limiting seniors' discount

By: [Erica Subingsing - Reporter](#) / @EricaSubing | Philippine Daily Inquirer / 05:34 AM January 18, 2024



Increasing geopolitical conflicts

Security dilemmas

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# Political Splintering

GOVERNANCE

**45%** <sup>35%</sup> Think Donald Trump will be re-elected as President of the United States

**56%** <sup>21%</sup> Believe the war in Ukraine will end in 2024

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# OUTLOOK FOR 2024



2024 will be a better year than 2023

**86%**  
PH

**70%**  
Global

The global economy will be stronger in 2024 than it was in 2023

**74%**  
PH

**50%**  
Global



Words are never good or bad on their own, context makes them so. - Abhijit Naskar

# SHIELA ELAURIA

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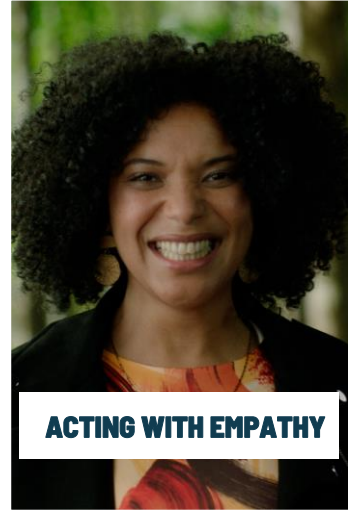
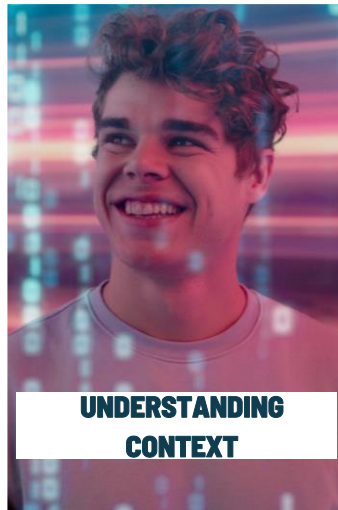
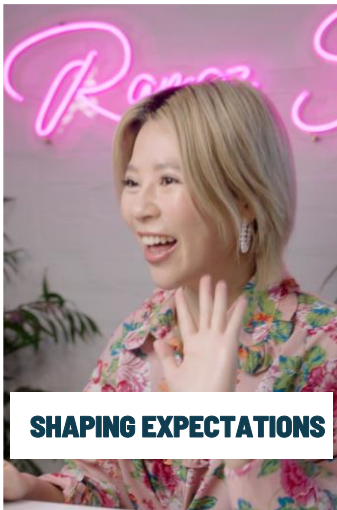
# UNDERSTANDING THE ESG CONTEXT AFFECTING OUR CONSUMERS

Shiela Elauria



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**GREAT BRANDS** **SHAPE EXPECTATIONS** THROUGH **EMPATHY** FOR PEOPLE AND THE **CONTEXT** OF THE WORLD AROUND THEM

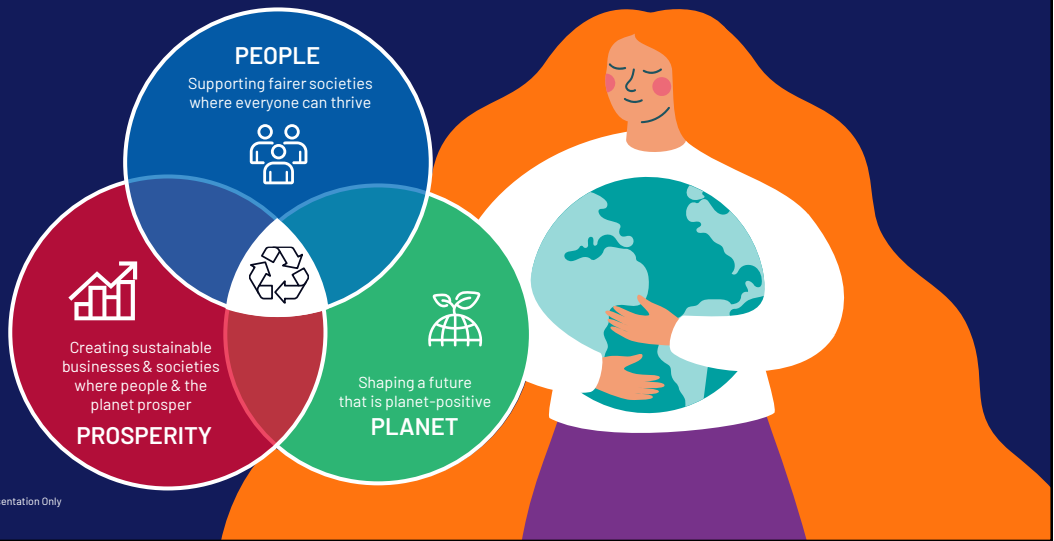


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# ESG: a way of creating a more sustainable and prosperous future for people and the planet



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## Consumer Perspective: Ipsos Global Trends suggest that there is potential value in ESG

We are heading for environmental disaster **unless we change our habits quickly**

% Agree



**80%**

Try to buy products from brands that act responsibly, **even if it means spending more**

% Agree



**64%**

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## Employee Perspective: ESG may play a role in attracting and retaining talent

Employer's ESG goals **make workers proud to work there**

% Agree

# 86%



Source: SHRM Research with 1,009 U.S. workers and 284 executives in September and October 2022

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## Business Perspective: organizations have been allocating more resources toward improving ESG

S&P 500 companies that **publish ESG reports**

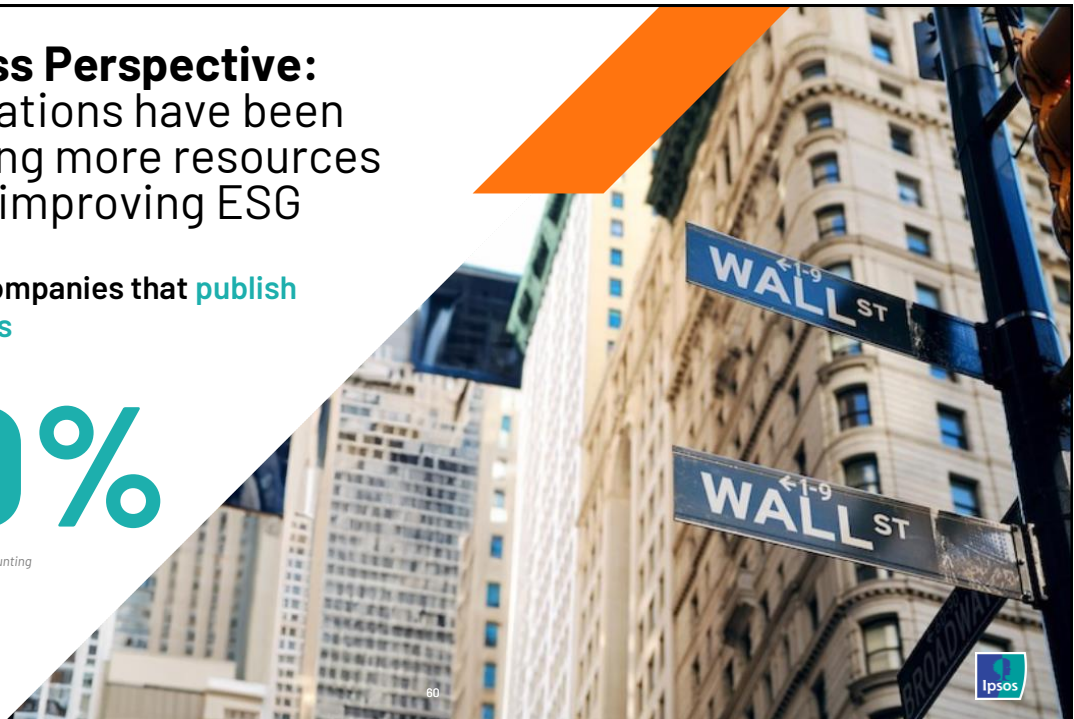
% Agree

# 90%

Source: Governance & Accounting Institute in New York City

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## The one to remember (for now): ESG



### Environmental

How a business affects the environment



### Social

How a business treats its employees, customers & communities



### Governance

How a business is run

## WHAT IS ESG ABOUT FOR IPSOS?



### INTERNAL

**Our own activities** to protect the environment and take care of society and our employees



**Walking the talk**



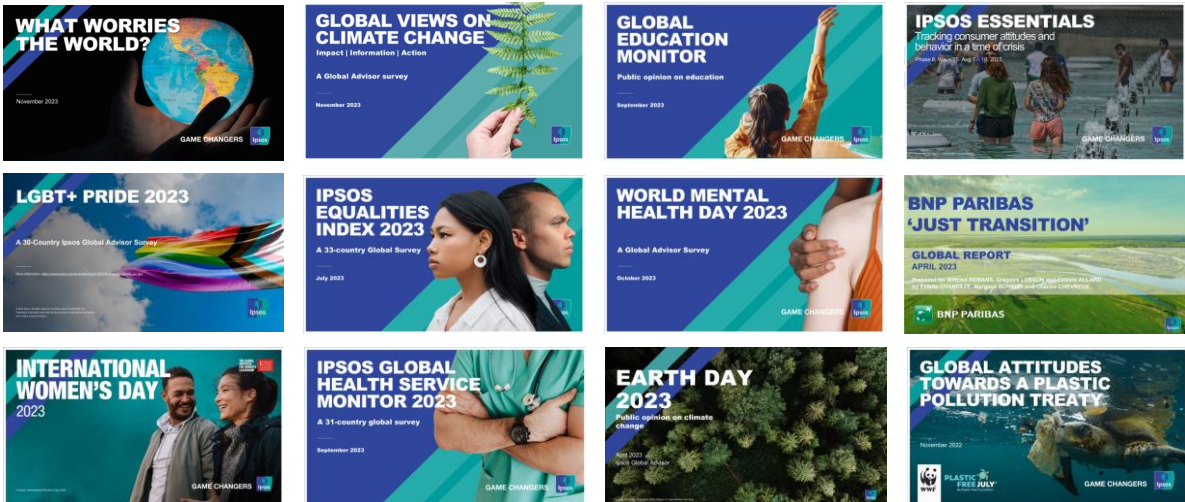
### EXTERNAL

**Our commercial activities to help our clients** protect the environment and take care of society and their employees



**Greatest impact**

# What we know on ESG's impact to consumers



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# What we know on ESG's impact to consumers



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# HOW ESG IMPACTS WHAT WE DO AS MARKETERS



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## How ESG impacts innovation work

### THE RESULT: CATCHING A NARROW ADVANTAGE

The analysis reveals sustainability-focused concepts yield **4% higher trial potential** than database average. In essence, there is a small incremental effect on uptake.

While no competitive advantage was associated to a brand's Believability or Expensiveness, Relevance and Differentiation demonstrate a higher lift.

In other words, sustainability-related claims can offer products a subtle means of distinction.

#### PERFORMANCE OF SUSTAINABILITY FOCUSED INNOVATIONS VS. AVERAGE INNOVATIONS

Higher Trial + 4%

#### PERFORMANCE OF SUSTAINABILITY FOCUSED INNOVATIONS VS. AVERAGE INNOVATIONS

More Relevant + 0.5  
 More Different + 0.3  
 More Believable + 0.1  
 Less Expensive - 0.2

+ 7.0 would be equivalent to +1 quintile database lift



### Purpose drives brand perception more than new product adoption

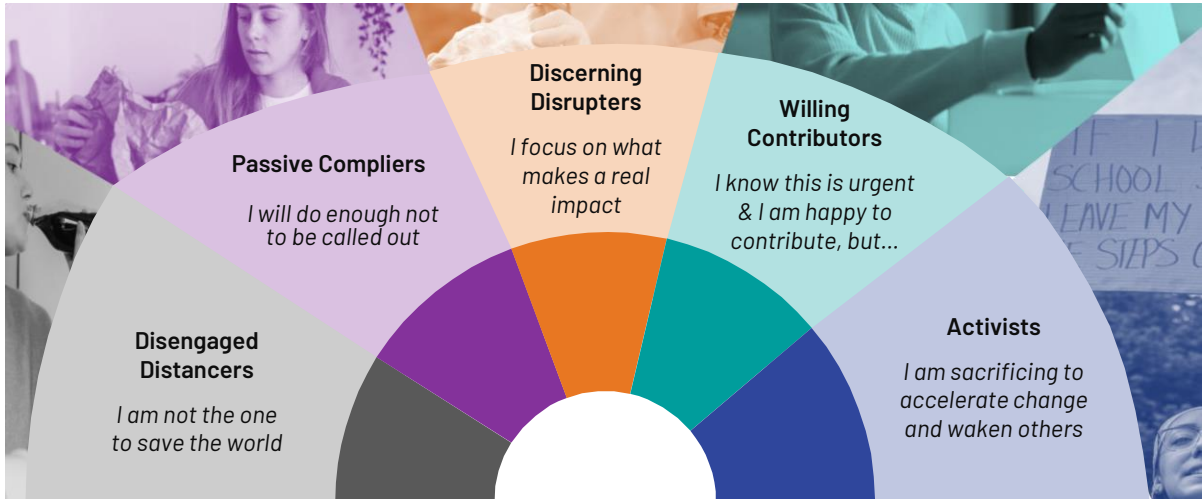
People are more likely to purchase a product that aligns with their values. Purpose-driven brands are perceived to have a greater impact on brand perception than new product adoption.

While a purpose-focused narrative does not appear to drive adoption of an individual innovation, it does get people to consider the product. More importantly, it drives positive perceptions of the brand, and therefore is likely to encourage consumers to try that product or another one from the same brand.



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# How ESG segments look, and how they may impact positioning



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# How ESG impacts what we track

**1** Understand how your brand performs relative to its competitors in key ESG areas

**2** Identify how your ESG initiatives work alongside other strategies to shape positive expectations of your brand

**3** Spot the most effective ESG messaging opportunities

**4** Determine which groups prioritise ESG and which are driven more by other factors

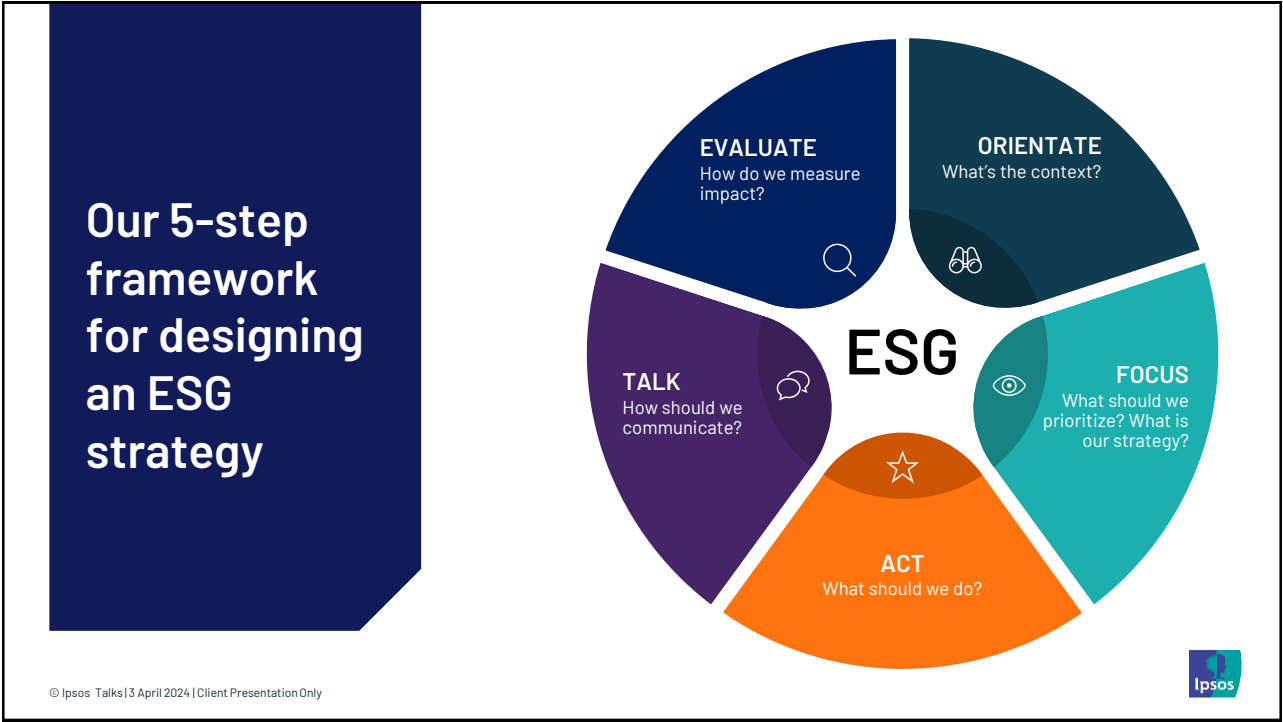
**IPSO'S PROPRIETARY ESG BRAND METRICS**  
We benchmark brand performance against critical brand ESG components and demonstrate the relationship with brand choice

**DRIVERS' ANALYSIS**  
We show how to best shape a relevant map of positive brand expectations, leveraging ESG as a co-benefit

**SUPERIOR ANALYTICS**  
We identify actions for a more effective brand ESG strategy and demonstrate the impact of brands' communications on shaping consumer expectations

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## Overall, a simple playbook:

- Transparency matters
- Be true to the brand
- Make it meaningful
- Never lose sight of key drivers
- Required behaviour change can be good

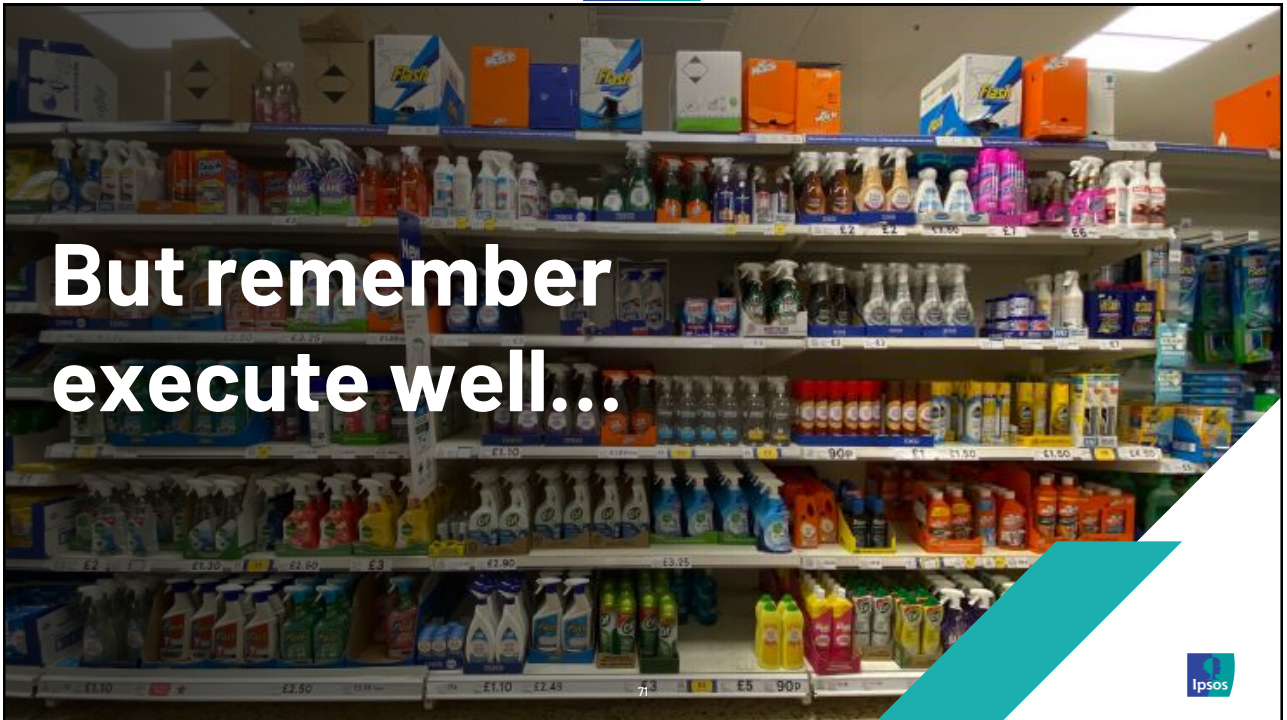
e.g.,

(but don't ask too much of people)

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“

Sustainable development is a fundamental break that's going to reshuffle the entire deck. There are companies today that are going to dominate in the future simply because they understand that.

**François-Henri Pinault**

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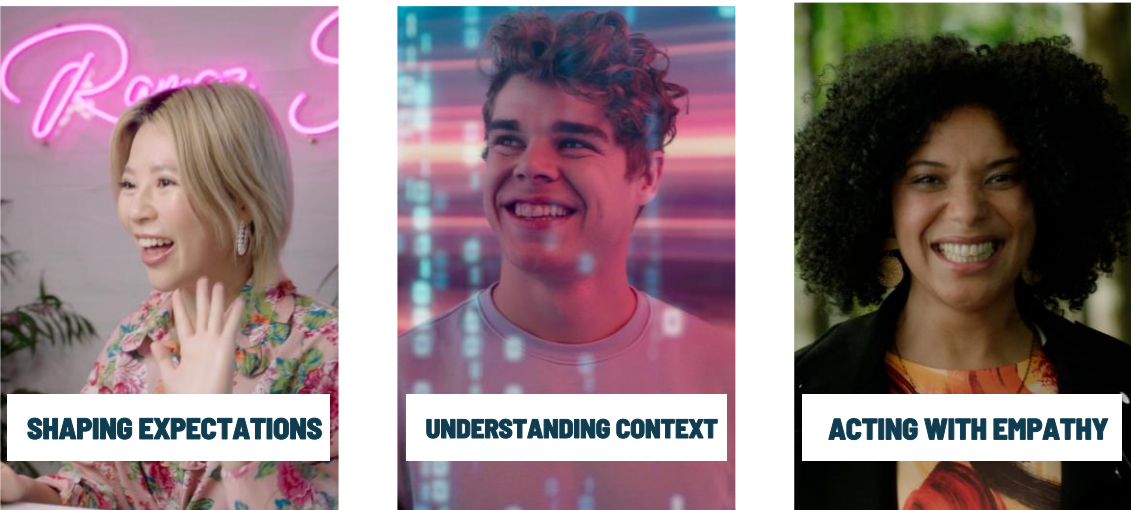


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**GREAT BRANDS SHAPE EXPECTATIONS THROUGH EMPATHY FOR PEOPLE AND THE CONTEXT OF THE WORLD AROUND THEM**



**SHAPING EXPECTATIONS**      **UNDERSTANDING CONTEXT**      **ACTING WITH EMPATHY**

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# Bringing A Culture of Empathy

Teena Ilag

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Empathy begins with understanding life from another person's perspective. Nobody has an objective experience of reality. It's all through our own individual prisms.  
**Sterling K. Brown**

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*Empathy is the human secret weapon that will outthink machines and drive progress*

**Jack Ma, Executive Chairman  
Alibaba Group**



## We see **EMPATHY** as a Critical Future Success Factor

**+10%** Improvement in Customer Experience

**+\$1B** Growth in Revenue

# EMPATHY

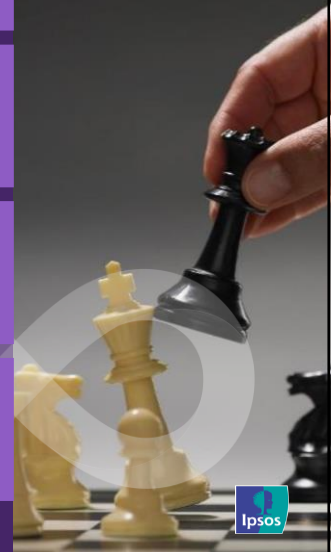
IS GOOD FOR BUSINESS

**Better Products**  
That meet the needs of consumers

**Stronger Brands**  
That stand the test of time

**Memorable Experiences**  
That shape expectations and ensure greater ROXI

**Impactful Communication**  
That moves the needle



# AND IT'S NOT ALL ABOUT YOU...

## Business Questions: (All about you)

1. Build penetration
2. Drive volume
3. Improve share
4. Establish brand leadership
5. Conversion from competitive/  
current product
6. Build the category

## People Questions: (All about them)

1. How to help them feel reassured
2. How to make things easy
3. How to build confidence
4. How to inspire a moment
5. How to provide an experience
6. How to address a lifestyle



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## But WHY EMPATHY NOW?

### Age of Poly-Crisis



Inflation



Differences in  
Generational Views



Employee  
Dissatisfaction



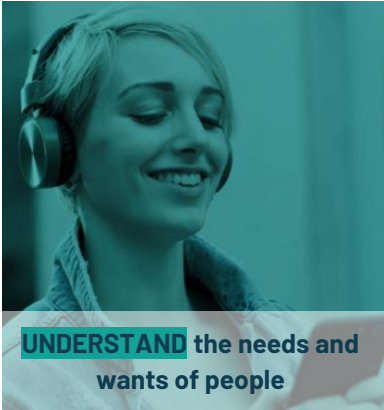
Diversity &  
Inclusion,  
Sustainability

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# How do we become perceived as EMPATHETIC? It's when we.....



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## The EMPATHY MUSCLE and how do we build it



### Hear Me

Deep listening overview and tools



### See Me

Ethnographic principles guide analysis of visual data



### Look Around Me

Speak to people who know them, experts, those in their social circle



### Experience Me

Analogous Experiences inspired by my life so that you can experience my reality

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Meet  
**DOUG DIETZ**  
Lead Innovation Architect @ GE

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**Doug is  
responsible for  
designing MRI  
machines**

He is particularly proud of  
the new model by GE...

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Doug went to Cedars-Sinai Medical Center to oversee the installation on a new MRI machine, and he happened to see Sarah and her father Paul

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Nurses mentioned that Sarah is bravely battling cancer and usually has a smile on her face but today she is filled with anxiety



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Doug learns that **33%** of all patients who received an MRI (Magnetic Resonance Imaging), reported feelings of panic and or anxiety during their MRI

- This figure is higher for kids
- This was not acceptable to Doug





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“  
*I must make this better for Sarah. Let me visit her home...*

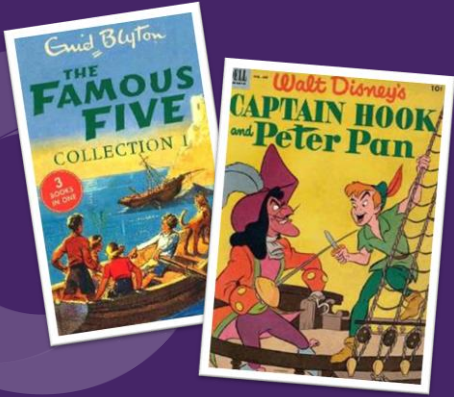

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## Sarah's HOME

 **See Me**  
Ethnographic principles of observation


“  
*My brother goes to Camp, but I can't go anywhere.*  
*These are his trophies not mine...*  
*I don't have any trophies and must stay at home ...*

**Trophies on display at the home but none for Sarah**



**Sarah just had books to turn to....**

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## GE ADVENTURE SERIES

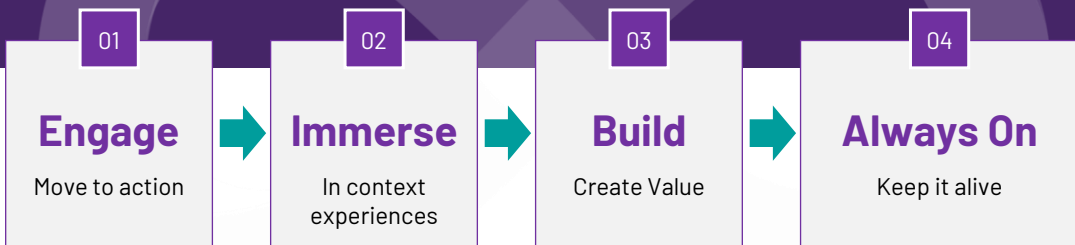


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## Building a Culture of Empathy is NOT a One Time Exercise



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Are you ready to champion  
**EMPATHY**  
in your organization?

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**THANK  
YOU**

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