

THE EMPATHY EFFECT

KEYS – A WEBINAR SERIES BY IPSOS

27 April 2023

AGENDA

Introduction

Jennifer Hubber

Head of Client Organisation, Ipsos

Taking the Temperature

Simon Atkinson

Chief Knowledge Officer, Ipsos

Empathy in Action

April Jeffries

Global President, Ethnography & Immersive Research, Ipsos

How Empathy Elevates Brand Success

Gillian Drewett

Global Head of Offer, Brand Health Tracking, Ipsos

Creative Effectiveness – the Empathy Factor

Arnaud Debia

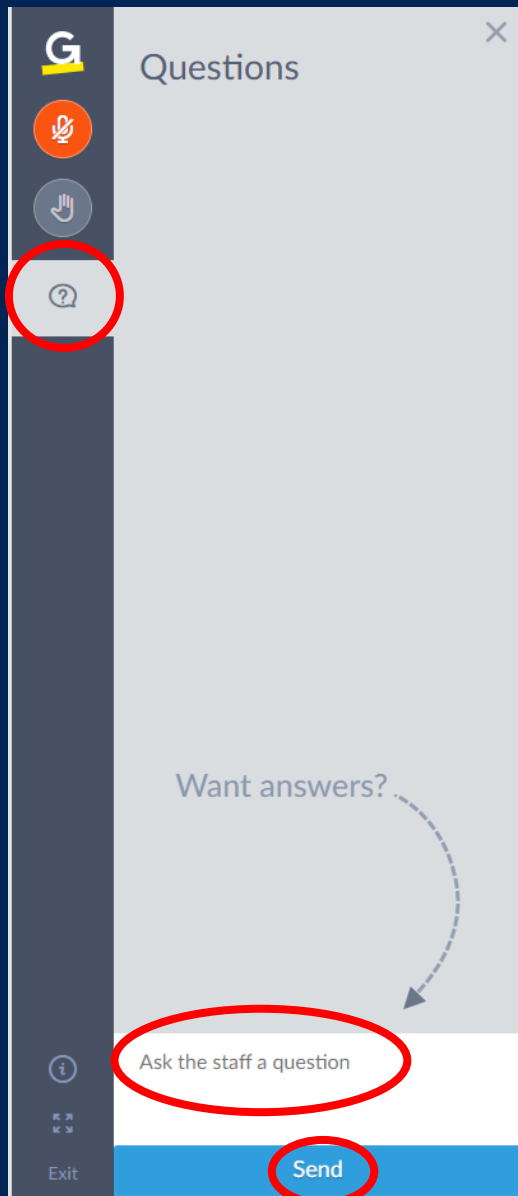
Global Creative Development Director, Creative Excellence, Ipsos

Geraldine Rodriguez

Client Manager, Creative Excellence, Ipsos in Spain



Watch the recording



QUESTION TIME

Do you have questions for our panellists?

Please send them by clicking on the  on the left panel.

You can ask your question at any time during the session.



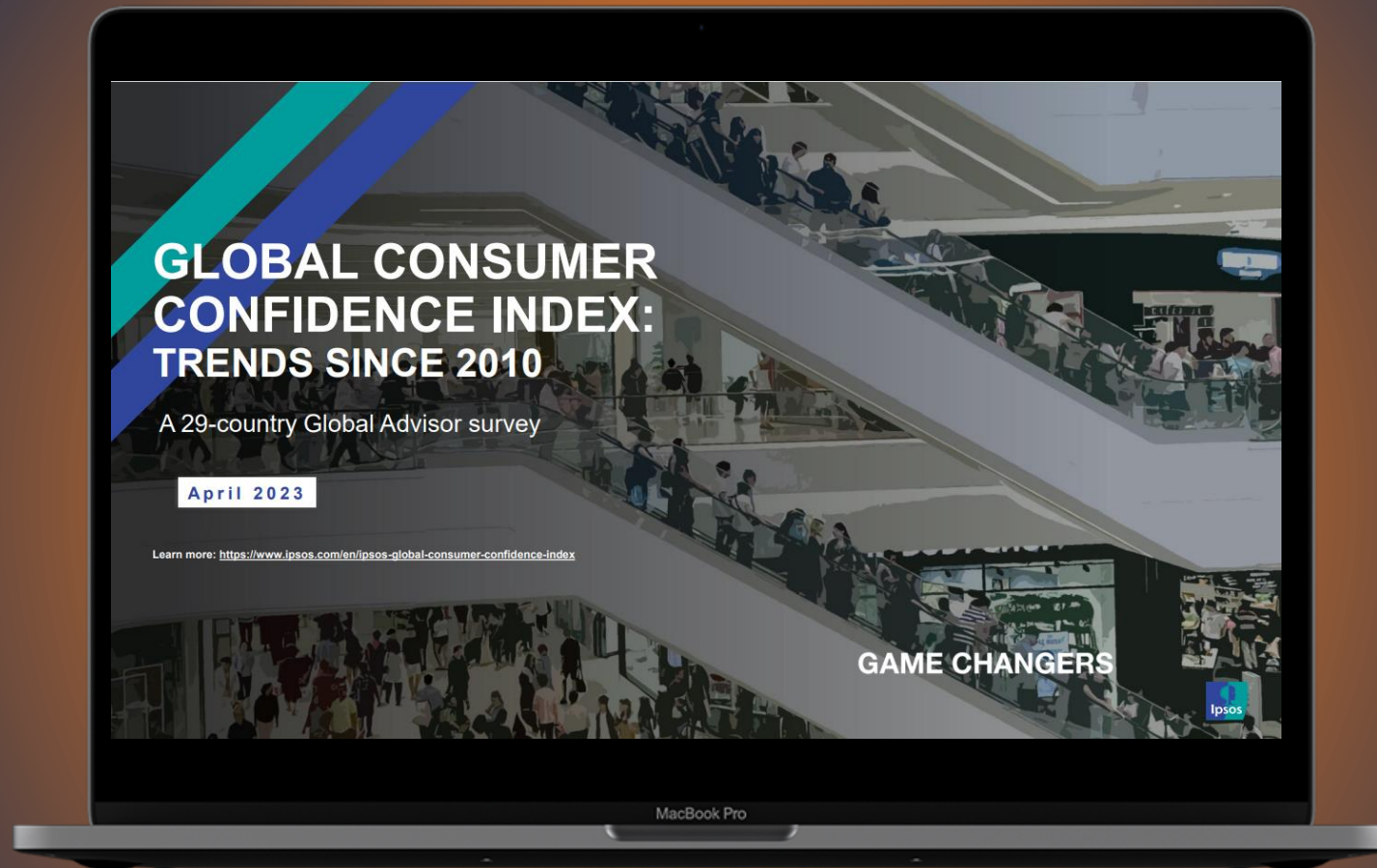
TAKING THE TEMPERATURE

Simon Atkinson

TAKING THE TEMPERATURE

Simon Atkinson

TAKING THE TEMPERATURE



Learn more: <https://www.ipsos.com/en/ipsos-global-consumer-confidence-index>



GLOBAL CONSUMER CONFIDENCE INDEX: TRENDS SINCE 2010

A 29-country Global Advisor survey

April 2023



Consumer confidence moves in opposite directions among world's largest economies

Sentiment rises significantly in Japan, Germany, and Canada while France hits a two-year low.



GLOBAL CONSUMER CONFIDENCE INDEX: TRENDS SINCE 2010

A 29-country Global Advisor survey

The 12 month view

THE 12 MONTH VIEW

1-year change (vs April 2022)

Largest losses		Largest gains	
Sweden	-8.0	Brazil	+11.3
Hungary	-7.4	Turkey	+10.5
Australia	-5.0	Mexico	+8.2
France	-4.4	Belgium	+4.6
South Korea	-3.6	Spain	+2.6
Argentina	-3.5	Germany	+2.5

Source: Ipsos | Global Consumer Confidence Index - April 2023

• [Embed](#) • [Download image](#) • Created with [Datawrapper](#)

THE 12 MONTH VIEW: **LARGEST LOSSES**

1-year change (vs April 2022)

Largest losses		Largest gains	
Sweden	-8.0	Brazil	+11.3
Hungary	-7.4	Turkey	+10.5
Australia	-5.0	Mexico	+8.2
France	-4.4	Belgium	+4.6
South Korea	-3.6	Spain	+2.6
Argentina	-3.5	Germany	+2.5

Source: Ipsos | Global Consumer Confidence Index - April 2023

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A QUICK LOOK AT SWEDEN

Bloomberg [Subscribe](#) 

Economics

Sweden Defies Forecasts With Biggest GDP Gain in Four Months

- Indicator data showed 2% expansion on month in January
- Data contrasts with forecasts for full-year contraction

By [Ott Ummelas](#) and [Niclas Rolander](#) [+Follow](#)

9 mars 2023 à 07:37 UTC

Updated on 9 mars 2023 à 08:37 UTC

REUTERS [World](#) [Business](#) [Markets](#) [Legal](#) [Breakingviews](#) [Technology](#) [Investigations](#) [Sport](#)

 [Macro Matters](#)

5 minute read · March 16, 2023 6:00 AM GMT · Last Updated a month ago

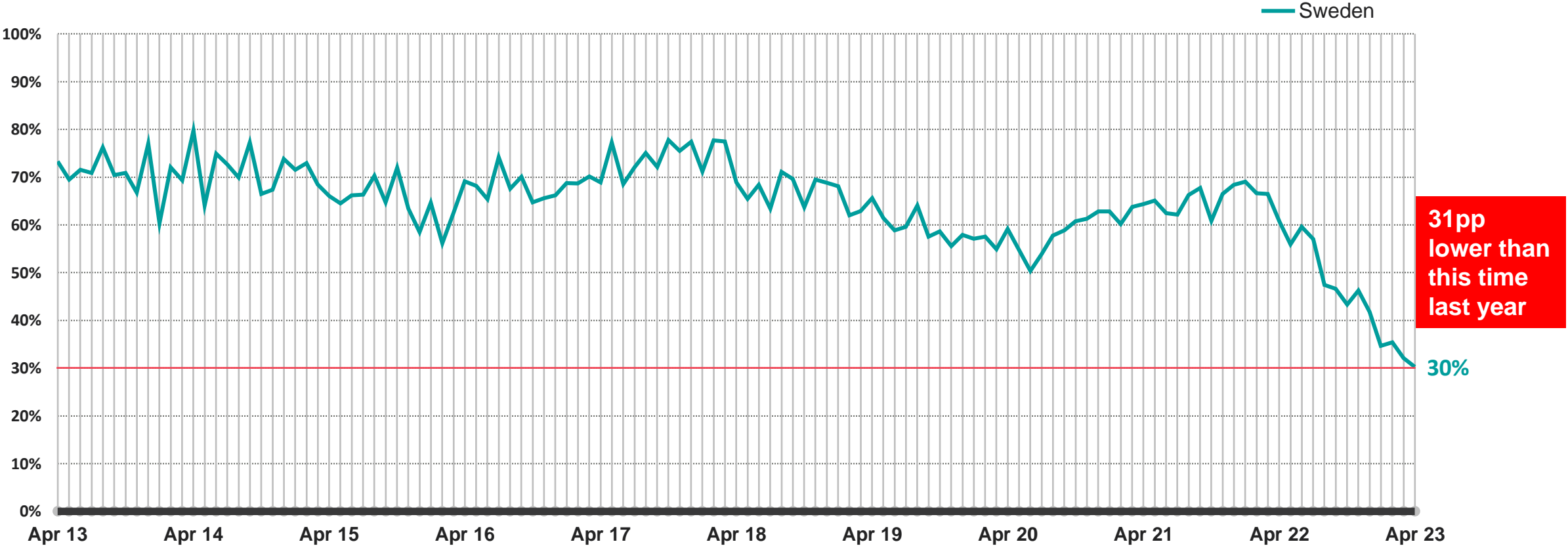
 **Analysis: Sweden faces recession as housing market troubles take toll on economy**

 By [Simon Johnson](#)



CURRENT ECONOMIC SITUATION: SWEDEN

Q How would you describe the current economic situation in your country?
(% 'Very good' or 'Somewhat good')



Base: Representative sample c. 500 adults aged 16-74 in Sweden, 2013 - 2023.

Source: Ipsos Global Advisor. Global score is a Global Country Average. See methodology for details.



THE 12 MONTH VIEW: LARGEST GAINS



1-year change (vs April 2022)

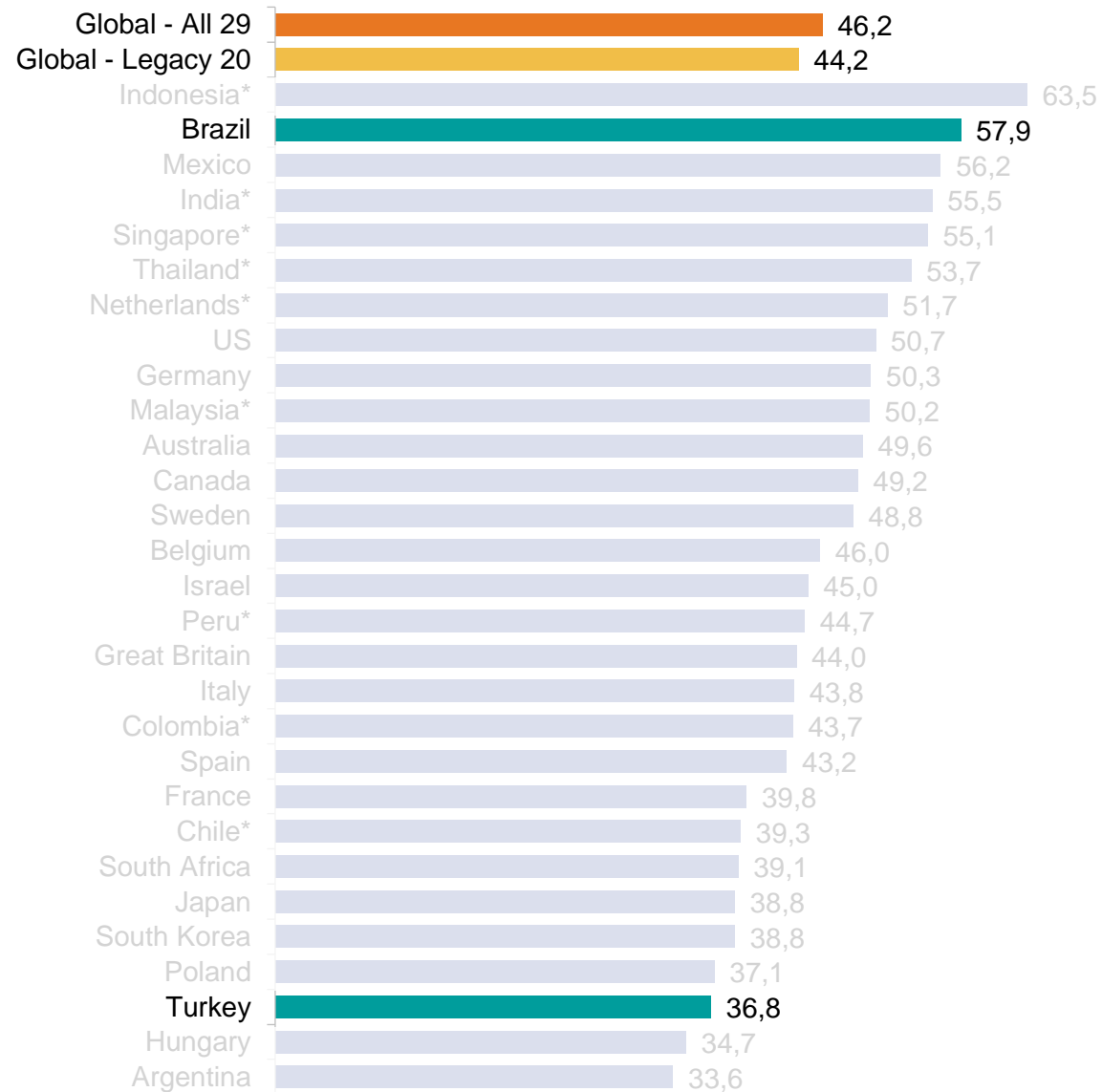
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Source: Ipsos | Global Consumer Confidence Index - April 2023

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DIFFERENT COUNTRIES, DIFFERENT CONTEXTS...

SUMMARISING WHAT'S HAPPENING RIGHT NOW IS **Not Easy!**



THE CURRENT SITUATION IS **HARD TO READ**

The Economist, 17 April 2023


Finance & economics | The art of interpretation

How to explain the puzzle of the world economy

Welcome to the Mona Lisa effect

The
Economist



A close-up, high-resolution image of the Mona Lisa's face, showing the texture of the paint and the subtle, enigmatic smile. The lighting is warm, highlighting the contours of her face.

**“The post-pandemic economy is like
the Mona Lisa. Each time you look,
you see something different.”**

The Economist, 17 April 2023

WHAT WORRIES THE WORLD?

April 2023

NEW

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



Explore the results for your country [here](#)

GAME CHANGERS



APRIL HEADLINES



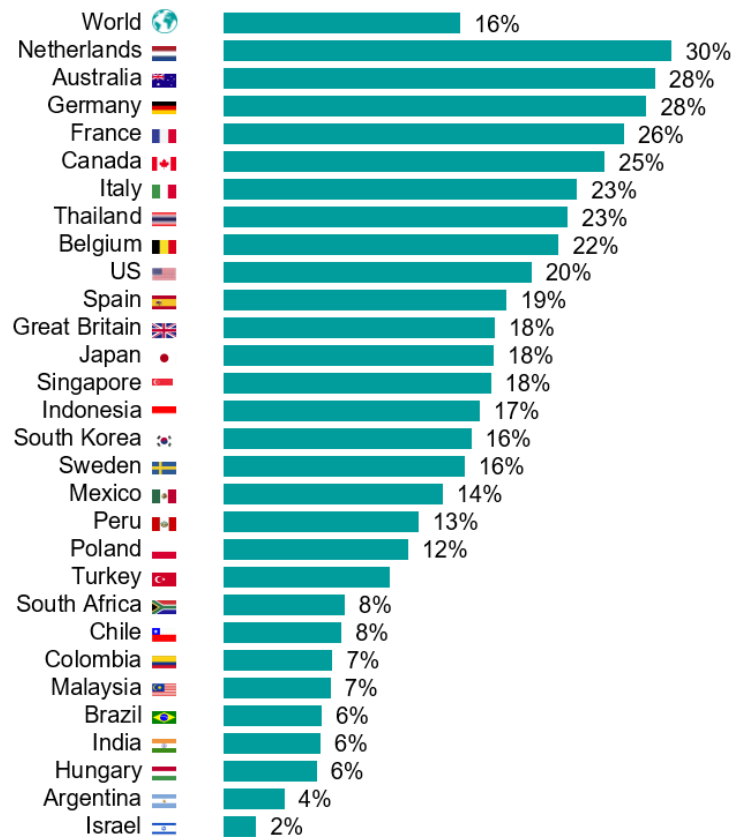
Inflation #1 for
13th month in row

Covid ranked
17/18 issues

Climate Change = 7th

7 | SPOTLIGHT ON CLIMATE CHANGE

% saying it's one of the most worrying topics facing my country



Base: Representative sample of 25,042 adults aged 16-74 in 29 participating countries, March 24th 2023 - April 7th 2023.
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*
Filter: Country: World | Current Wave: Apr 23

EARTH DAY 2023

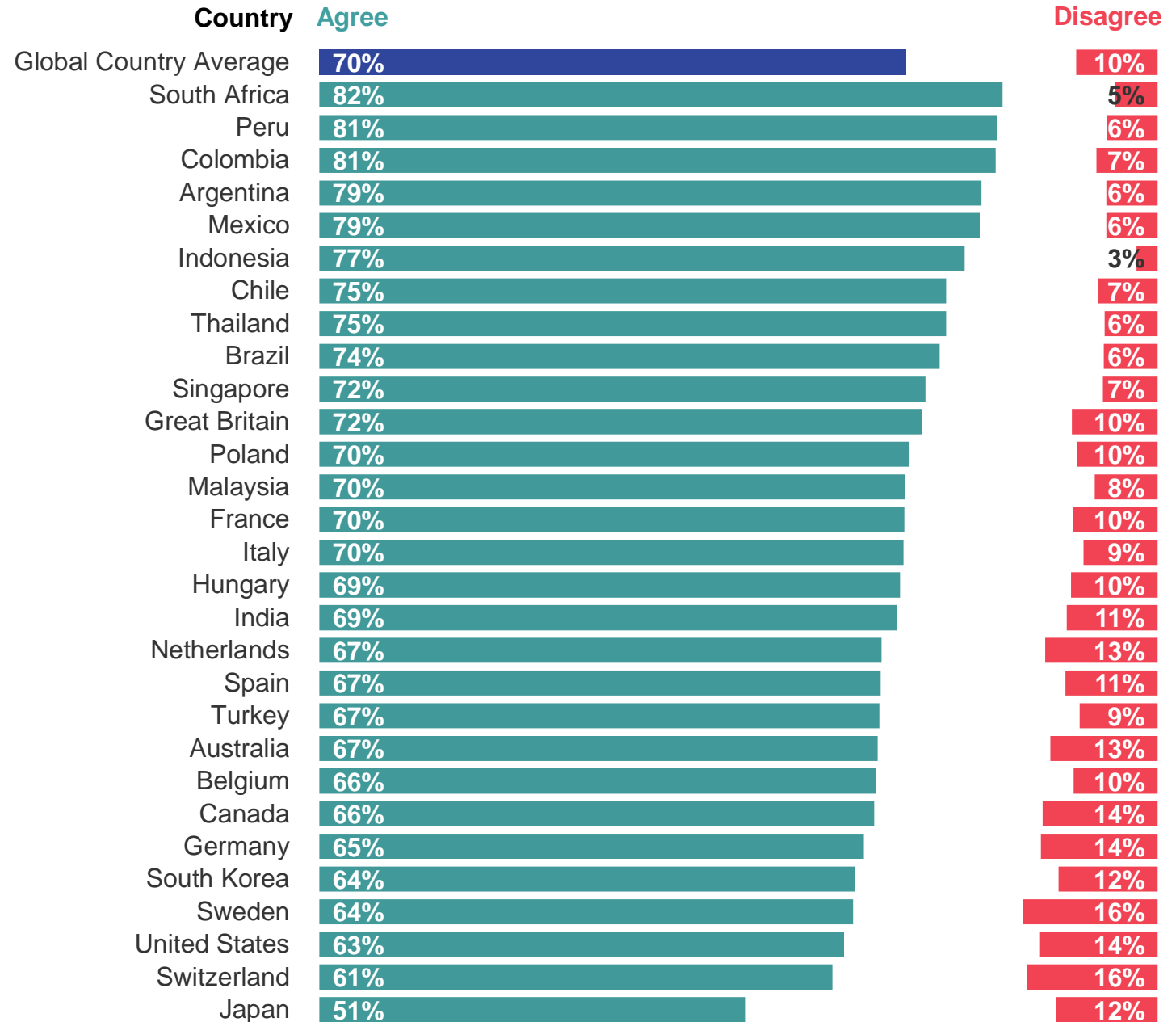
**Public opinion on climate
change**

Earth Day 2023 – Is concern and focus slipping on climate change?

All is not (yet) lost...

Q. To what extent do you agree or disagree:

“If everyone made small changes in their everyday lives this could have a big impact on tackling climate change”



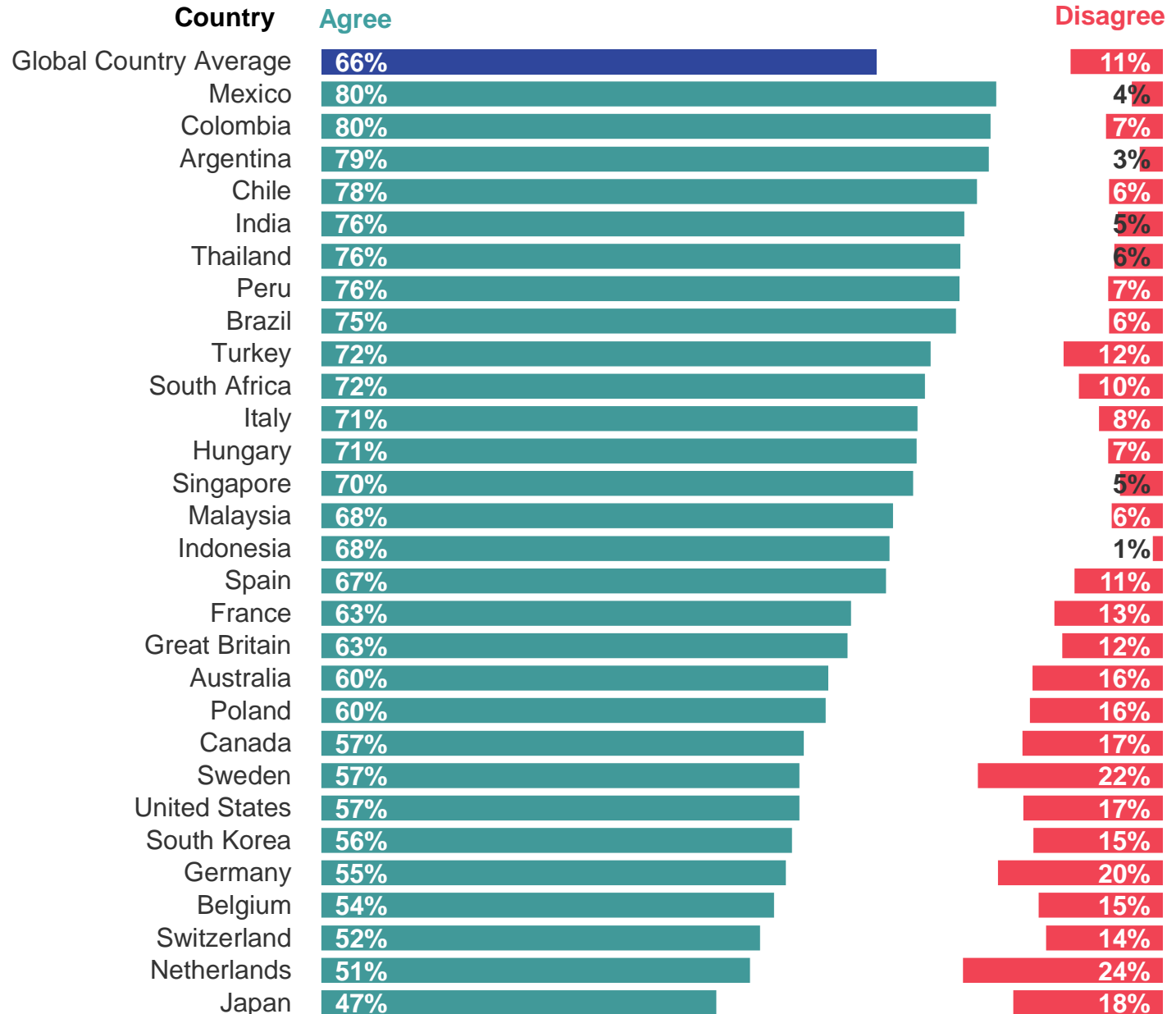
Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. “The “Global Country Average” reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.”



We have an obligation to act

Q. To what extent do you agree or disagree:

“My country should do more in the fight against climate change”



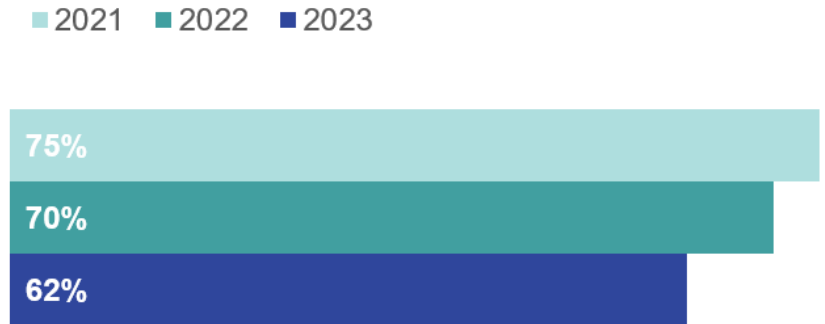
Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. “The “Global Country Average” reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.”

But...do we need to act *right now*?

26 comparator countries – trended

Q. To what extent do you agree or disagree with the following...

If **individuals like me** do not act now to combat climate change, we will be failing future generations



If **businesses in ...** do not act now to combat climate change, they will be failing their employees and customers



If **... 's government** does not act now to combat climate change, it will be failing the people of ...



Base: 2023: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023; 2022: 22,033 online adults under the age of 75, interviewed 18 Feb – 4 Mar 2022; 2021: 20,511 online adults under the age of 75, interviewed 19 Feb – 5 Mar 2021. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. The 26 comparator countries include: Argentina, Australia, Belgium, Brazil, Canada, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and USA

EXPLORE THE 29-COUNTRY STUDY



Download the report [here](#)

Is concern and focus slipping on climate change?



A Global Country Average of just under a third (31%) agree that their government has a clear plan in place for how government, businesses and people are going to work together to tackle climate change. This has declined slightly since last year, an indication perhaps of the change in government focus due to the need to tackle more immediate political, social and economic issues. This is supported in other findings where division is seen about whether now is the right time to be investing in climate change or not. Although a majority disagree that the negative impact of climate change is too far in the future to worry about.



When it comes to whose responsibility it is to act, there is still an acknowledgement that it is a shared responsibility between government, business, and citizens. Although, this recognition of the need to act has also slipped back slightly and noticeably so when looking at the perceived role of business.



Despite the weakening perception of governments having a plan to act as well as the reduced view of the responsibility that everyone needs to take, there is an acknowledgment, across the 29 countries, that the economic cost of climate change itself will be larger than the cost of measures to reduce it. Linked to this there is consensus that a collaborative effort across countries will be needed to fully tackle climate change whilst also stating that those countries who have contributed most to climate change should take stronger financial responsibility for funding that change.

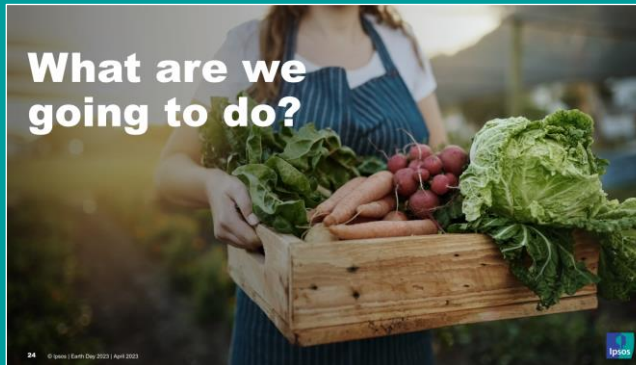
© Ipsos | Earth Day 2023 | April 2023

What is the plan?

Who should act to combat climate change?



What are we going to do?




Perils of perception



EMPATHY IN ACTION



April Jeffries



**Every business problem is a human problem.
Every data point is from some human behavior.**

Empathy— Why Now?



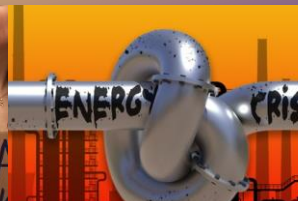
SEVERAL TENSIONS IMPACTING PEOPLE'S LIVES



CLIMATE

IDENTITY

CONFLICT



INFLATION

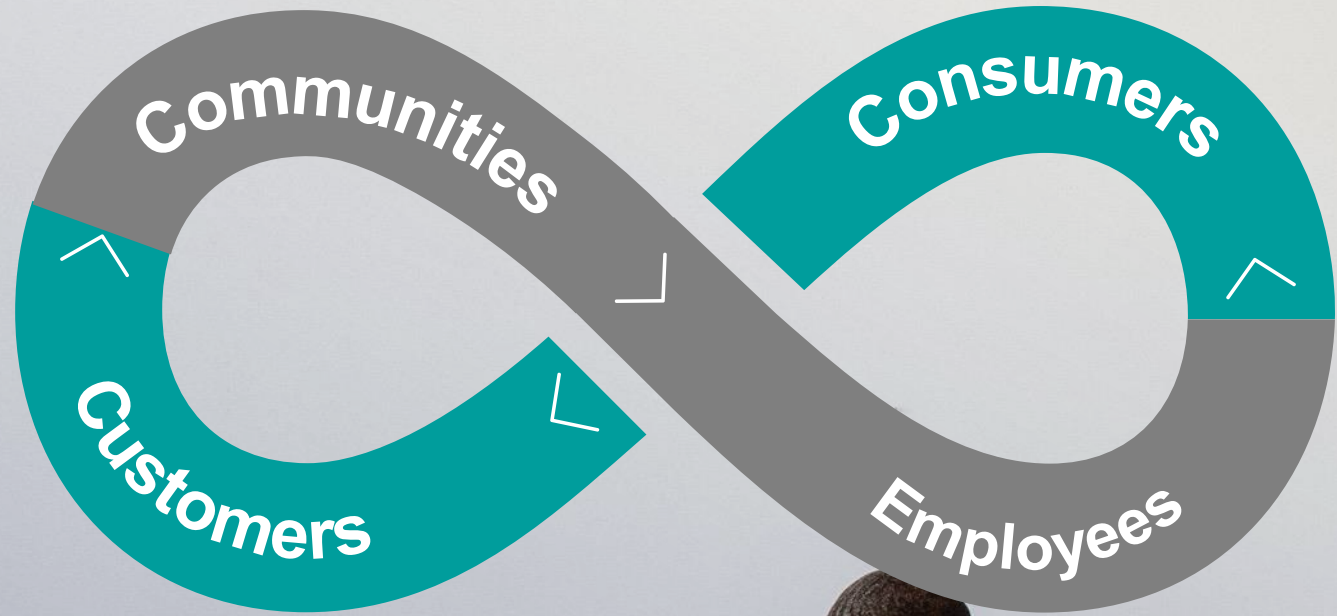




**We need a front
row seat in the
lives of
humans**

Empathy Expanded

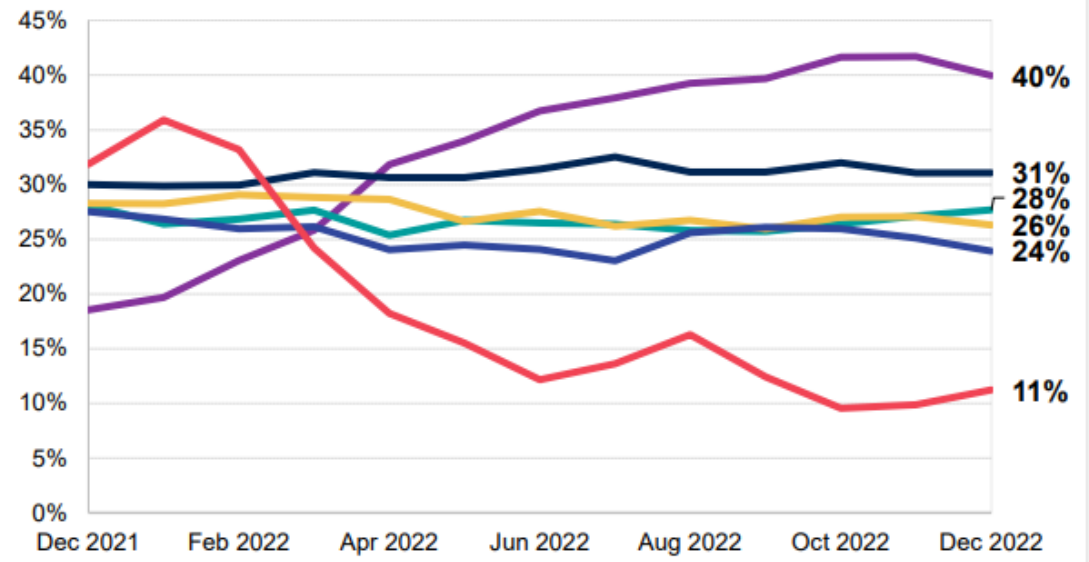
Inside and Out



Inflation, the new pandemic



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



- 
Inflation
- 
Poverty & social inequality
- 
Crime & violence
- 
Unemployment
- 
Financial/political corruption
- 
Coronavirus
11th place this month

Base: Representative sample of c.19,504 adults aged 16-74 in 29 participating countries, December 2021 - December 2022.
Source: Ipsos Global Advisor. *Global score is a Global Country Average. See methodology for details.*

ALL CONSUMERS ARE **NOT** AFFECTED EQUALLY

Depending on life stage, financial realities, personality, attitudes and mindset



“

*I want to
feel valued.*

Consumers understand brands are in tough spots



“it’d be nice if the people who could afford a life raft could share a corner as much as they can.”

BE EMPATHETIC

BE RELATABLE

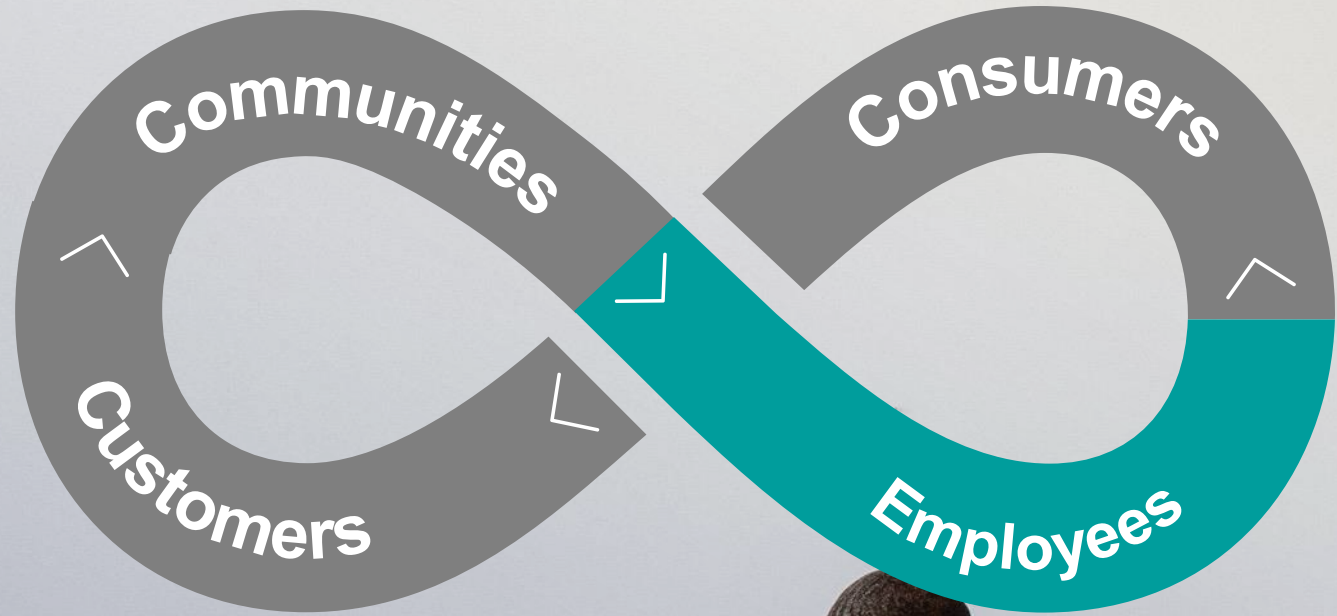
BE LOYAL

BE TRANSPARENT

BE A GOOD EMPLOYER

Empathy Expanded

Inside and Out



92

% CEOs that believe their organizations are empathetic.



50

% Employees report having empathetic CEOs



ROE – Return on Empathy

The financial performance of a company is tied to empathy

87%

CEO's Agree

Employees agree

%

More likely to stay with an organization that empathized with their needs

95%

Willing to work longer hours for empathetic employers

81%

Willing to take a pay cut to work for an empathetic company

60%

*Businessolver – State of Workplace Empathy Study

CASE STUDY: EMPLOYEE RESEARCH



CHALLENGE

The Glass Ceiling



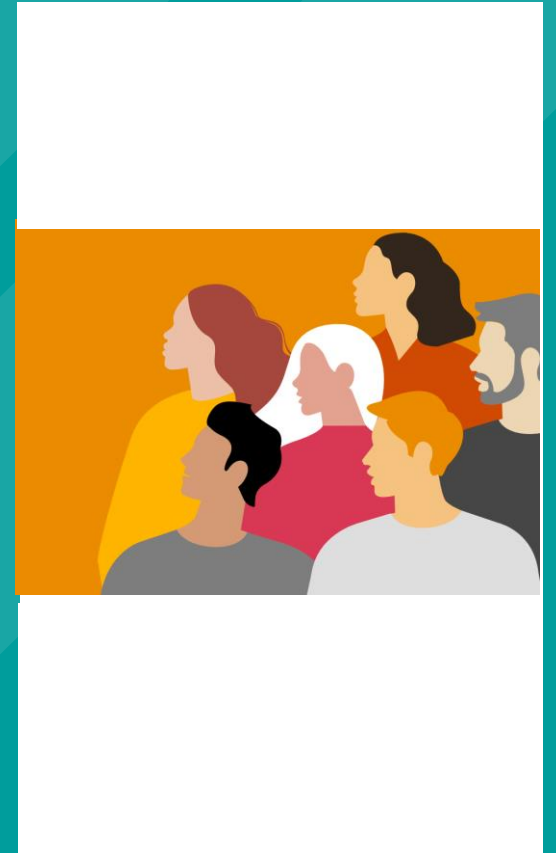
SOLUTION

Assessing Key Leavers



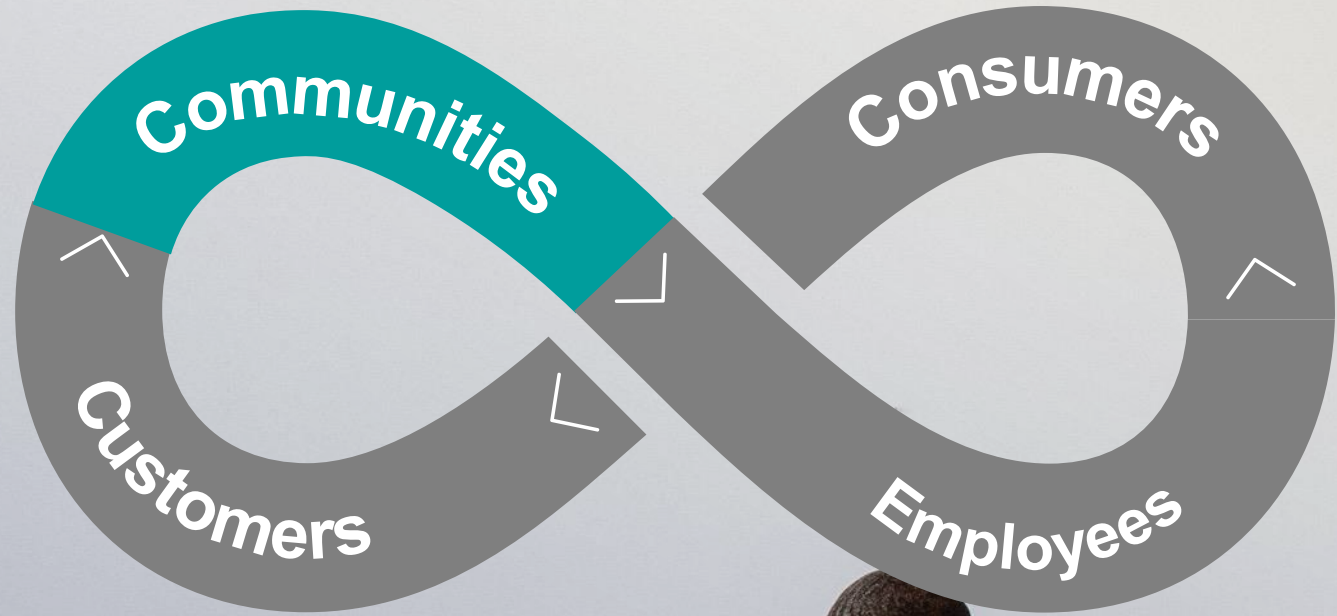
IMPACT

Focused Efforts, Significant Shifts



Empathy Expanded

Inside and Out



Companies Increasingly Thinking About Their Role in Society

The New York Times

A Friedman doctrine-- The Social Responsibility Of Business Is to Increase Its Profits



By Milton Friedman

Sept. 13, 1970



Forbes

Aug 20, 2019, 09:42am EDT | 5,540 views

The Purpose Of The Corporation? Business Roundtable Advances The Conversation, Now We All Need To Contribute



Jim Ludema and Amber Johnson Contributor @

Entrepreneur

The Economist

LEADER DEVELOPMENT

Stakeholder capitalism arrives at Davos

Adrian Luffield / Twitter January 21, 2020

Big business is beginning to accept broader social responsibilities

Pursuing shareholder value is no longer enough, it seems

House members assail Big Tech - consider changes to antitrust law



Support communities

Where you and your consumers live, work and shop



Co-Op reinvesting advertising dollars to community food initiatives.

Drug Franchise building stores within the community.

Ride share company providing free rides to the voting booth

Empathy = Connection

Think

what they think

Feel

what they feel

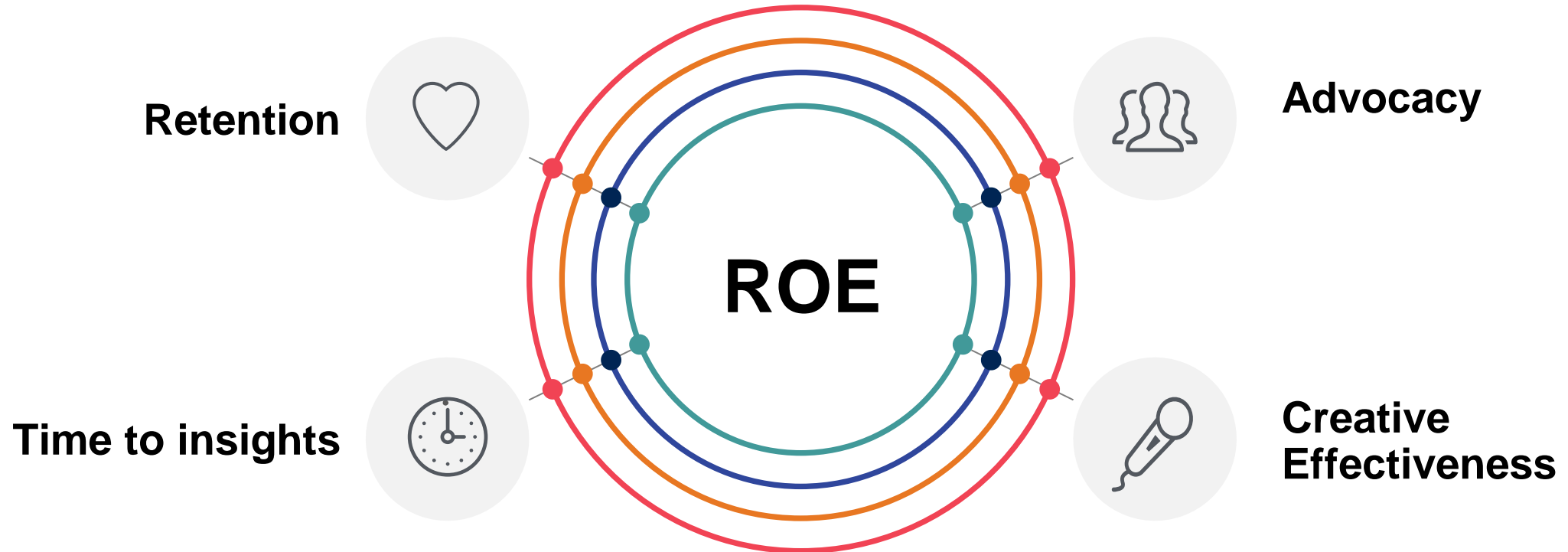
Do

What they do
(and can't do)

**To Add or Create Value
for the People you Serve**

Return On Empathy

Empathy Strengthens Key KPI's



Deep Understanding delivers Return on Empathy

A black and white photograph of a woman with long hair kissing a young child on the cheek. The child is laughing joyfully. The image is overlaid with a teal and blue diagonal graphic on the left side.

ACTION WITHOUT EMPATHY IS MEANINGLESS.

EMPATHY WITHOUT ACTION IS DIRECTIONLESS.

HOW EMPATHY ELEVATES BRAND SUCCESS

Building Successful Brands

Gillian Drewett

Global Head, Offer & Innovation – Brand Health Tracking

GAME CHANGERS



WHY EMPATHY?



Connection



Brands are managed
and marketed
by people, for people



1. EMPATHY

2. Focus

3. Impute

“Apple should strive for an “intimate” connection with customers' feelings.
“We will truly understand their needs better than any other company,”.

Mike Markkula





What do we mean by

EMPATHY?

Understanding what's important to people,
and how brands can add to their lives

What do we mean by

EMPATHY?

**Understanding what's
important to people**

Changing needs and wants
Changing context

Input

This requires

Really listening
Really understanding

What do we mean by

EMPATHY?

Understanding what's important to people

Changing needs and wants
Changing context

This requires

Really listening
Really understanding

Input

Output

And how brands can add to their lives

Deliver on wants, needs, expectations

This requires

Tangible action
Relevant action

DEMONSTRATING EMPATHY



DEMONSTRATING EMPATHY

Perceived empathy positively impacts beer choice in South African

16%

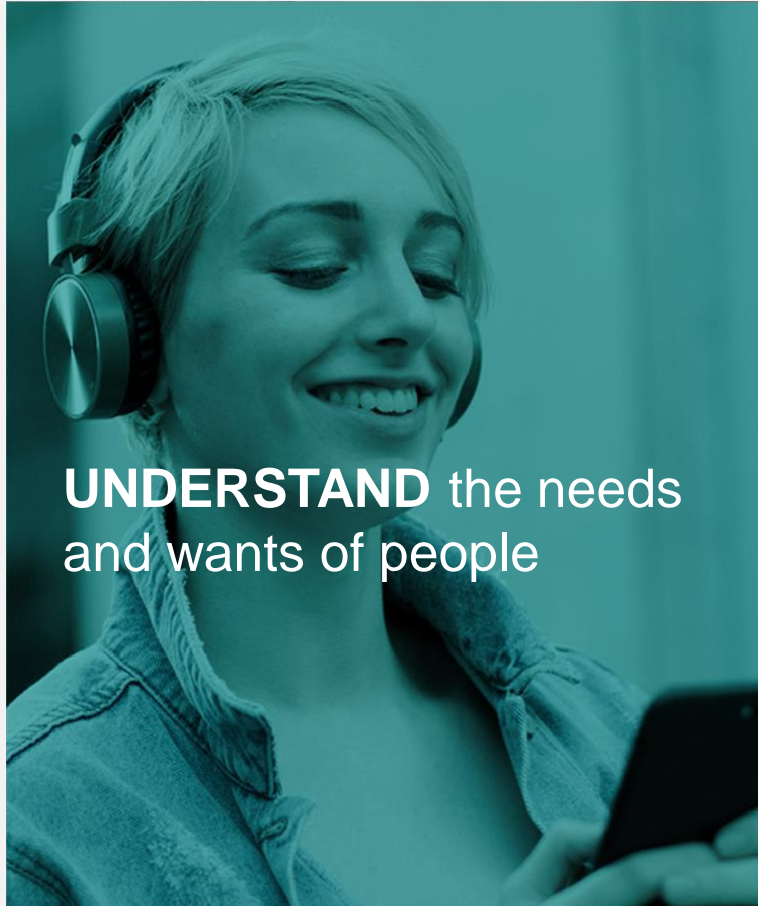
of **Brand Choice** for Beer in South Africa is about being perceived as having **empathy**



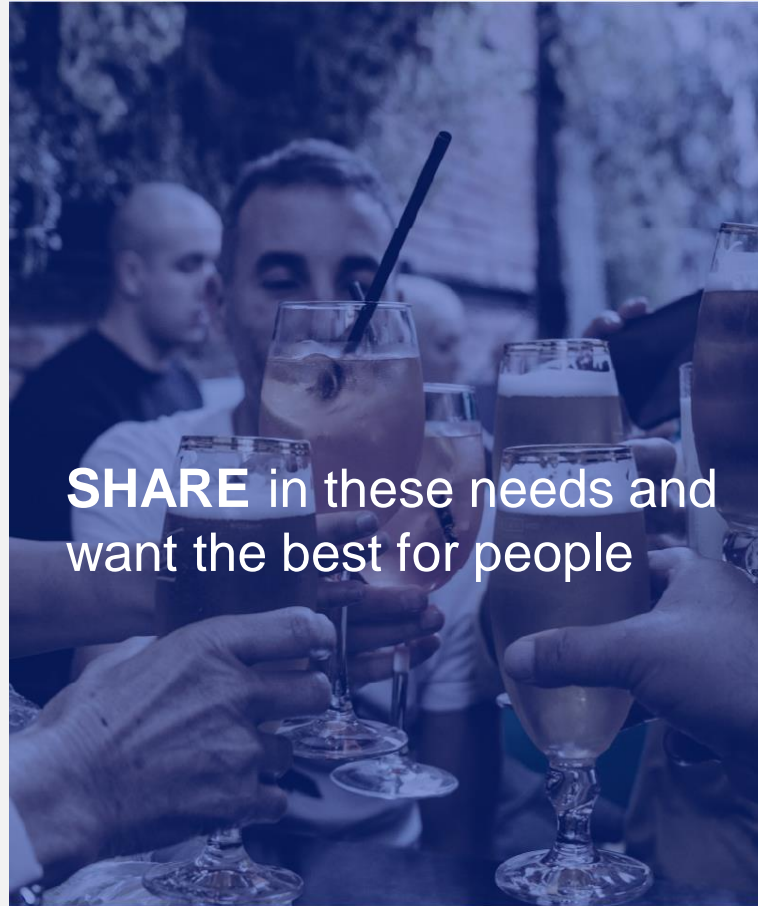
★ Heineken®



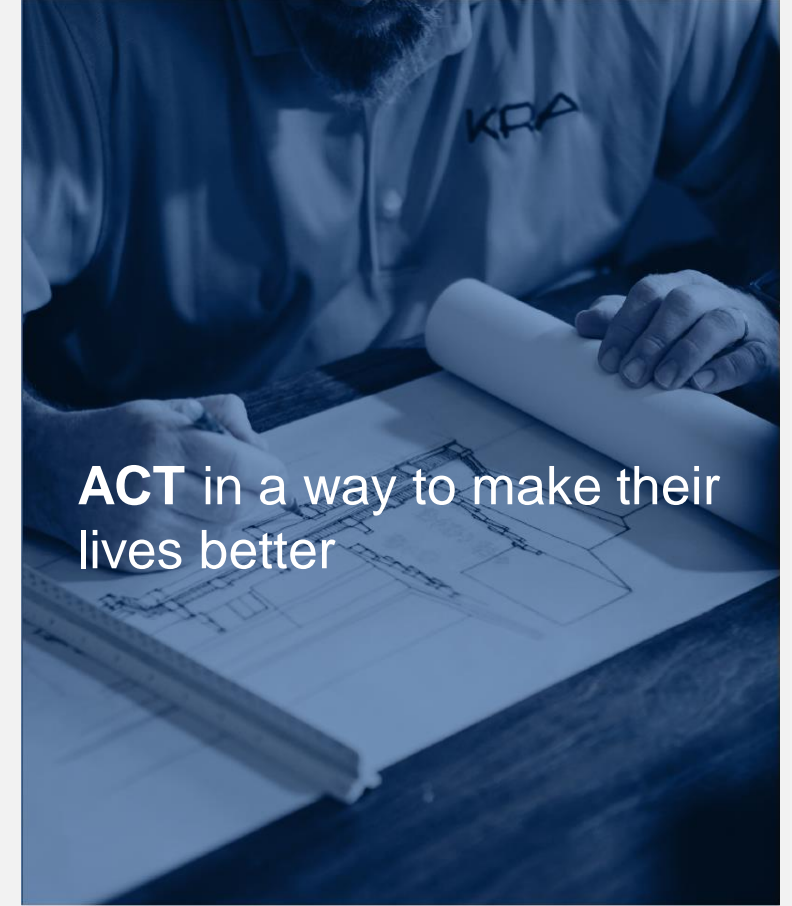
BEING PERCEIVED AS EMPATHETIC



UNDERSTAND the needs
and wants of people

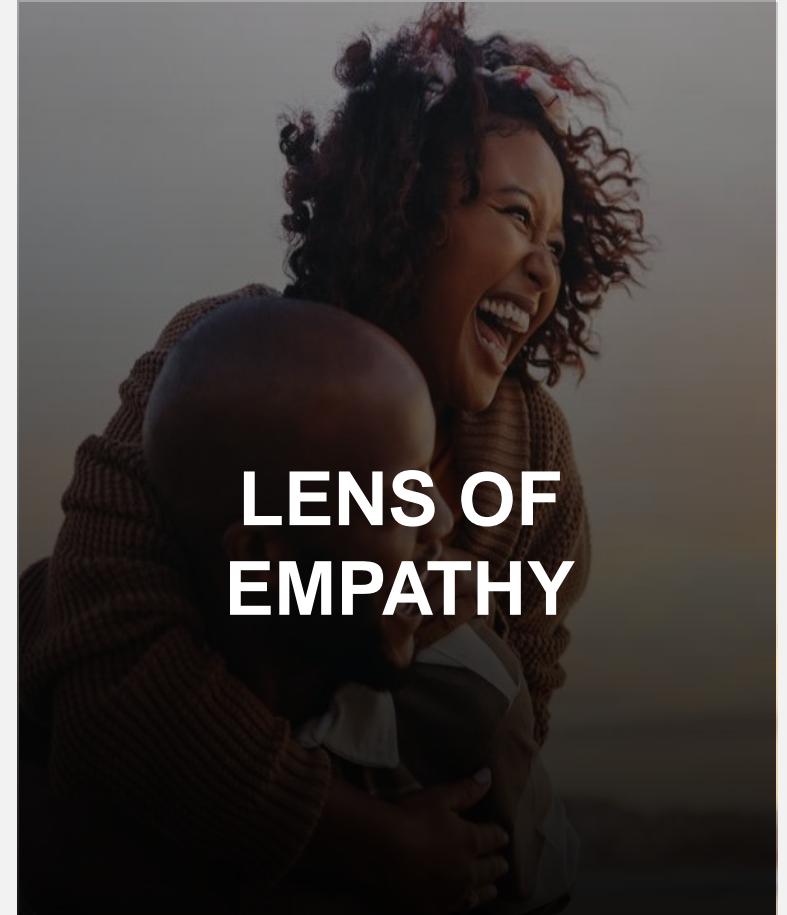
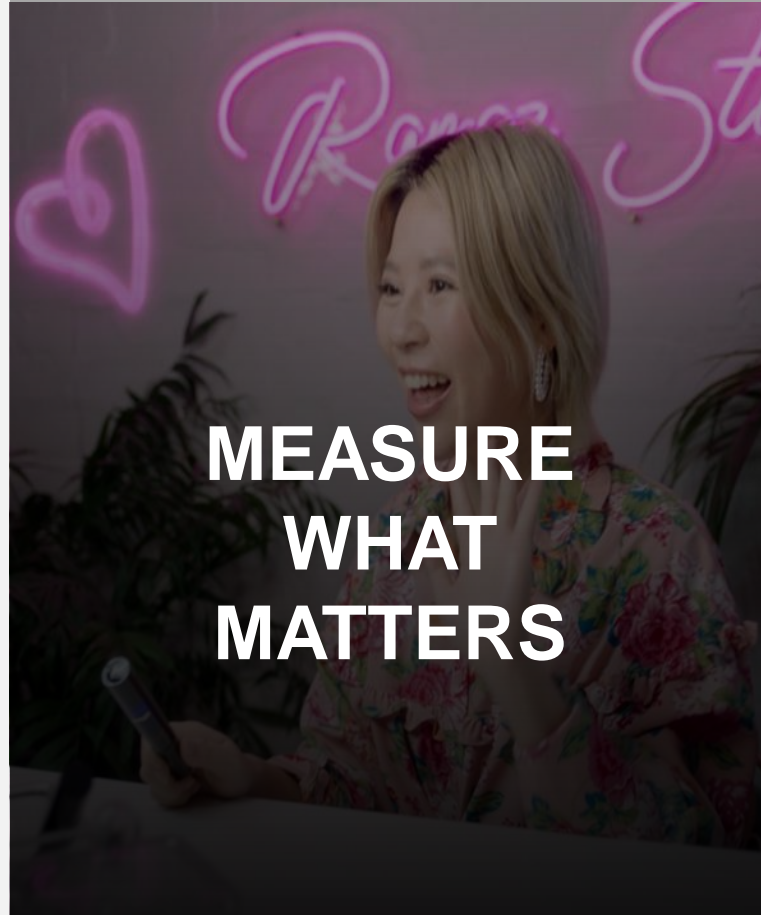


SHARE in these needs and
want the best for people



ACT in a way to make their
lives better

BEING PERCEIVED AS EMPATHETIC



WHAT THIS MEANS FOR **MARKETERS:**



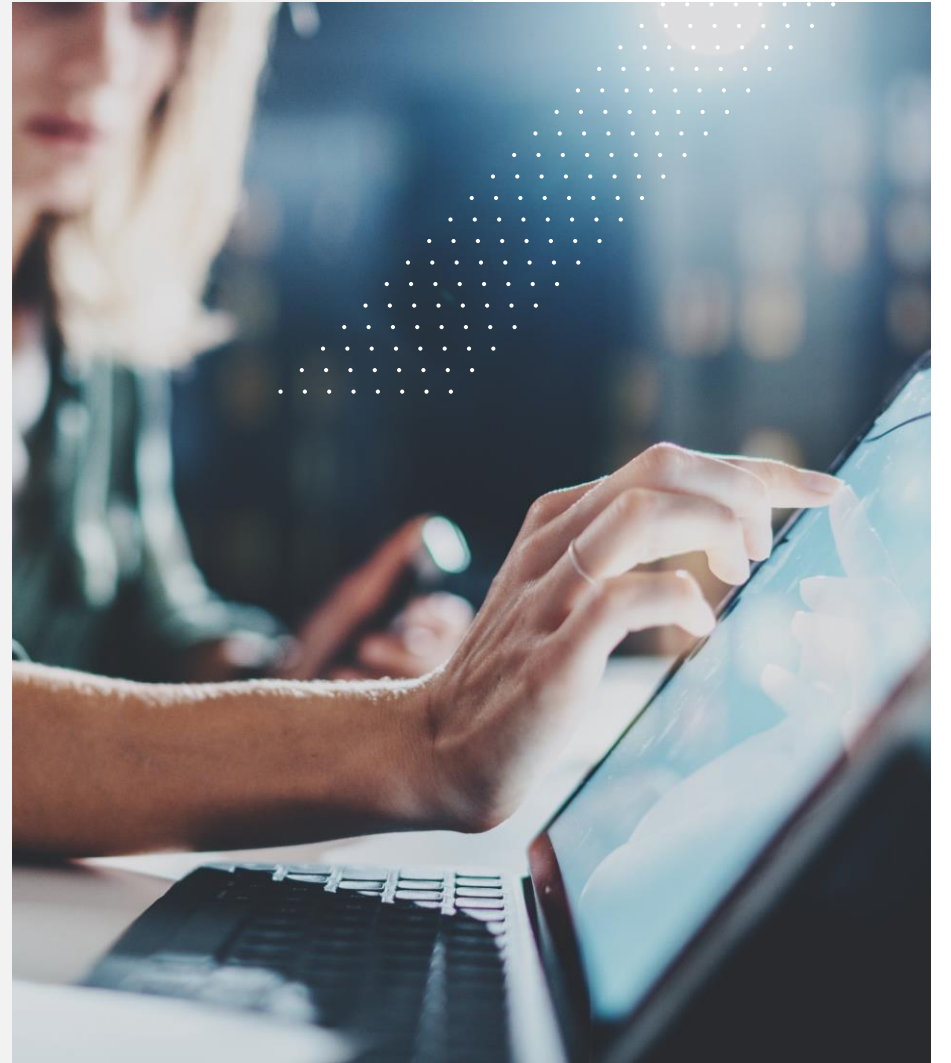
Nurture an empathy mindset



Ensure you have the right information to be able to act with empathy



Explore and fine tune how your brand can meaningfully resonate with people



A woman with dark, curly hair is smiling broadly, wearing a black jacket over a colorful patterned top. She is standing in a forest with many thin tree trunks in the background.

Brand success comes through
shaping **expectations**, understanding
context and acting with **empathy.**

Brand success comes through
shaping **expectations**,
understanding **context** and
acting with **empathy**.

How do you and your brands act with empathy?

CREATIVITY: THE EMPATHY FACTOR

How Empathy is essential to Bold, Brave Creative

2023



CREATIVITY IS ESSENTIAL IN ADVERTISING

CREATIVE EXPERIENCES

EMPATHY & FITTING IN

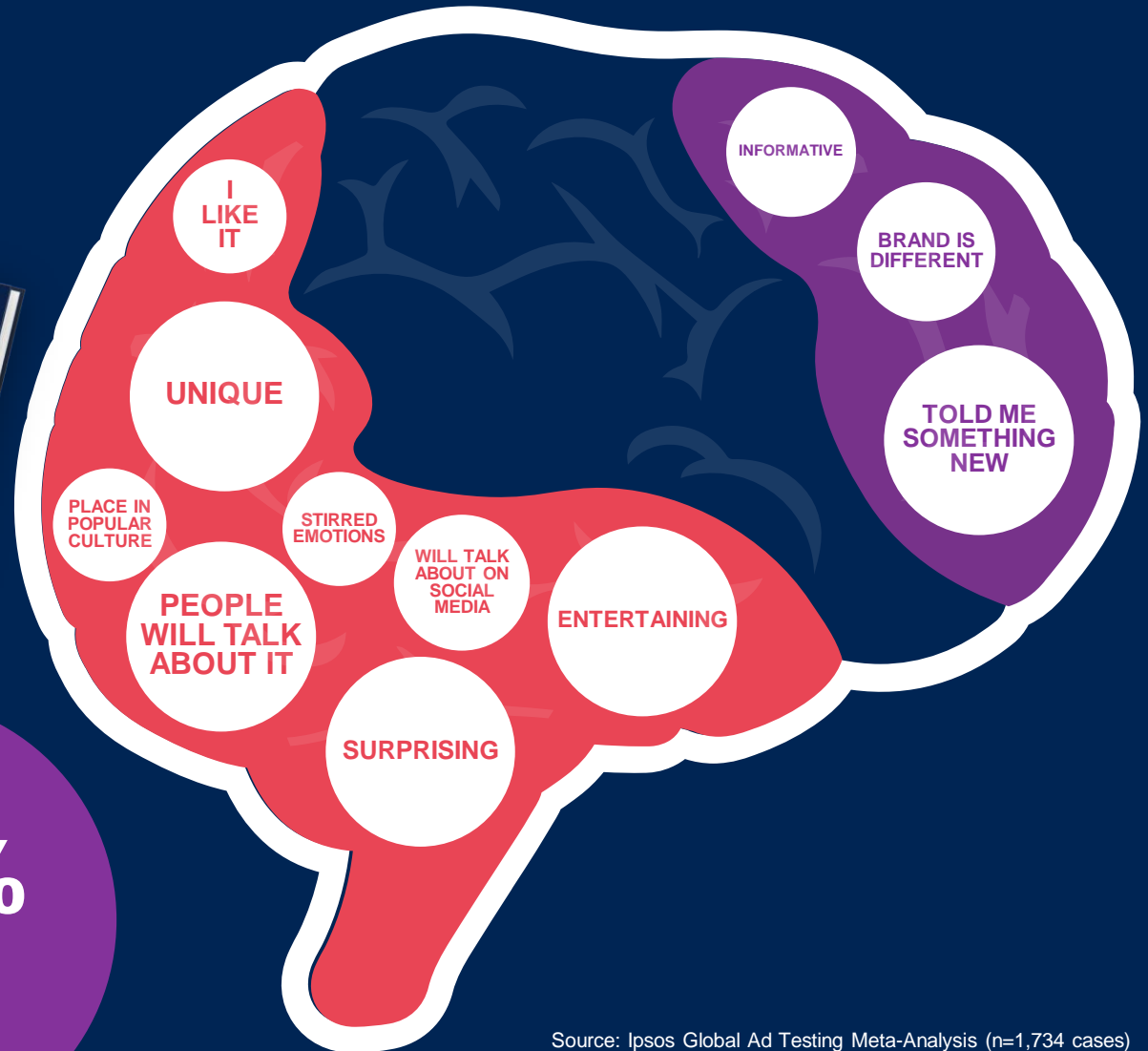
CREATIVE IDEAS



Adam Sheridan
GLOBAL HEAD OF PRODUCTS
AND ANALYTICS

ADVERTISE
HERE

Non conforming campaigns are
+21%
better at building
brand attention



Source: Ipsos Global Ad Testing Meta-Analysis (n=1,734 cases)



**YET TO THE REGULAR PEOPLE
THE MOST CREATIVE ADS
ARE SOMETIMES...**



CREATIVE

BUT CONFUSING



CREATIVE

**YET
POLARIZING**



RESONATING

**WITH PEOPLE
CHALLENGES...
BUT NOT WITH THE
BRAND**



CAN YOU BE

CREATIVE

+

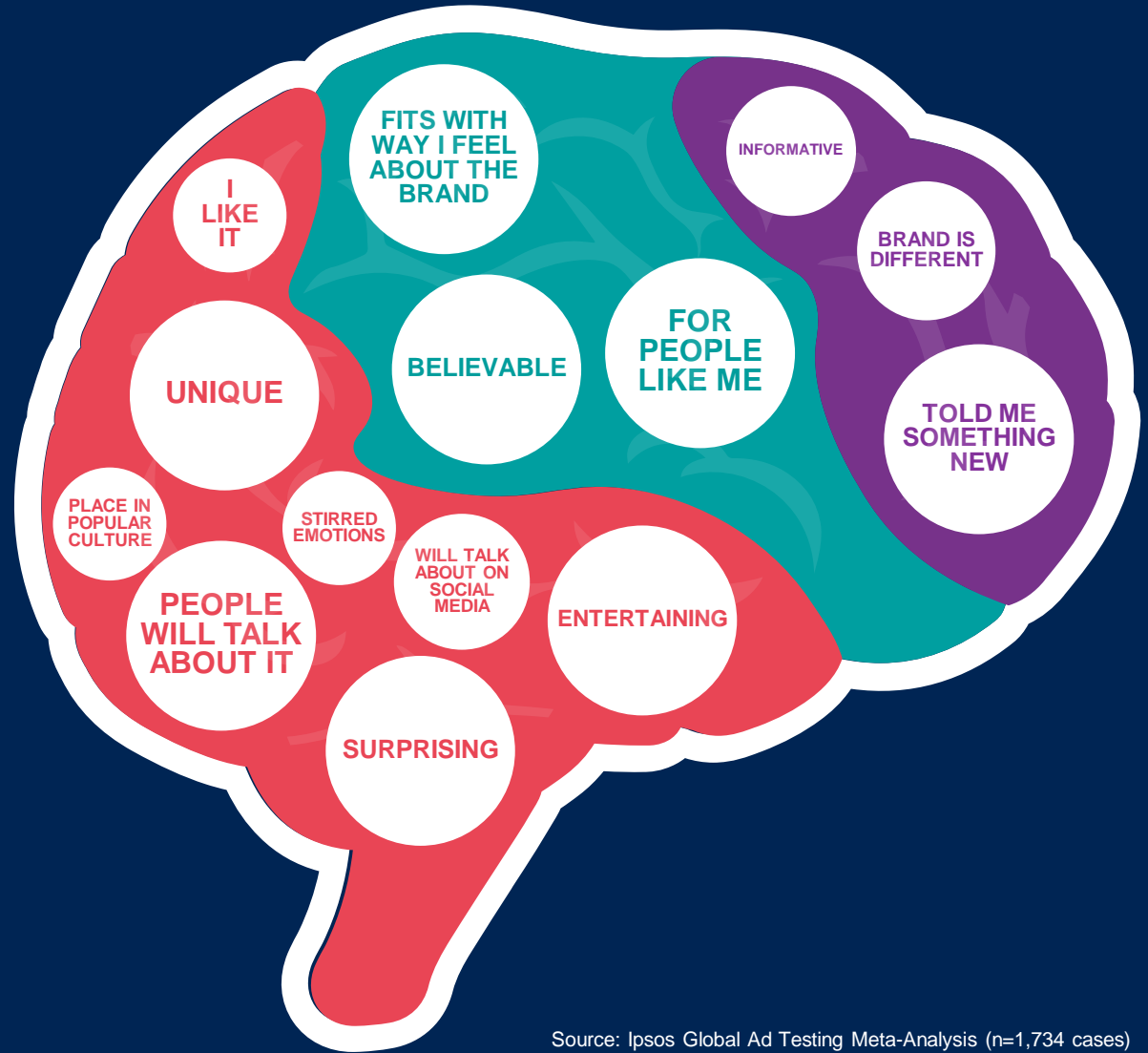
EMPATHETIC

EMPATHY IS THE SECOND KEY TO CREATIVE EFFECTIVENESS

CREATIVE EXPERIENCES

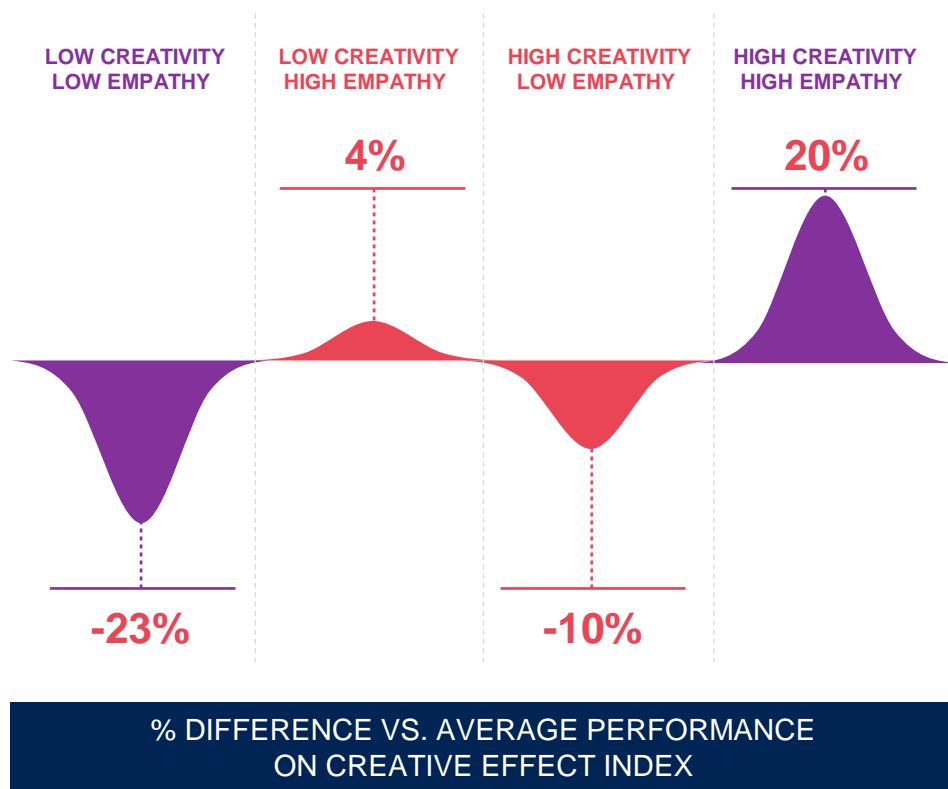
EMPATHY & FITTING IN

CREATIVE IDEAS



Source: Ipsos Global Ad Testing Meta-Analysis (n=1,734 cases)

EFFECTIVENESS COMES FROM CREATIVITY AND EMPATHY



Source: Ipsos Global Ad Testing Meta-Analysis (n=1,734 cases)

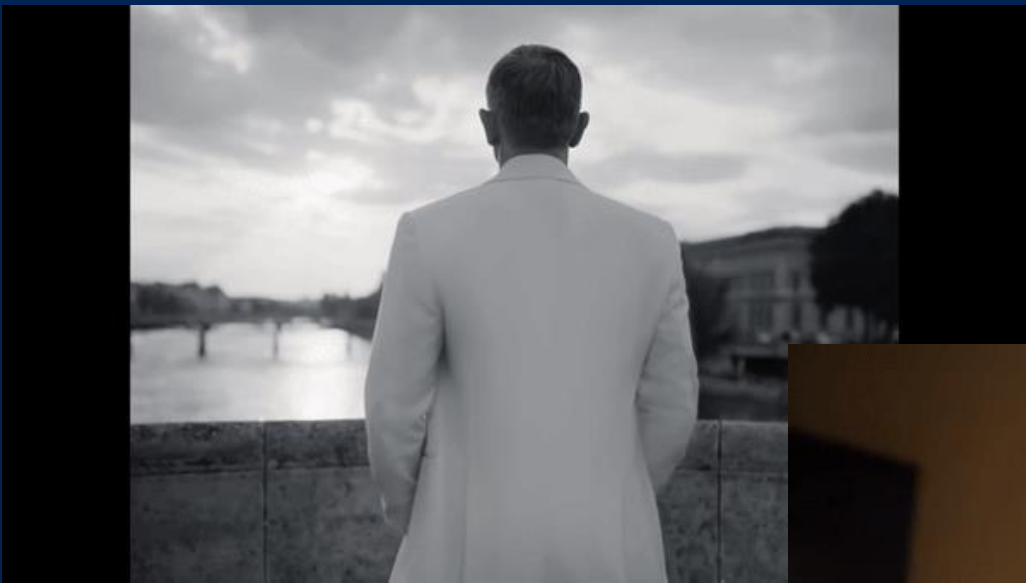
© Ipsos | MISATS: How Creativity in Advertising Sparks Brand Growth



It matters even more now
For people like me
driver importance 2022 vs 2021



WHAT WOULD YOU SAY OF THIS AD?



IS BELVEDERE

EMPTY?

OR EMPATHY?



THREE WAYS TO TRIGGER CREATIVE EMPATHY

CONTEXT

TENSION

EXPECTATIONS



CONTEXT

HEINEKEN

Inspired by real-life situations



TENSION

INVISALIGN

Portraying an honest struggle



EXPECTATIONS

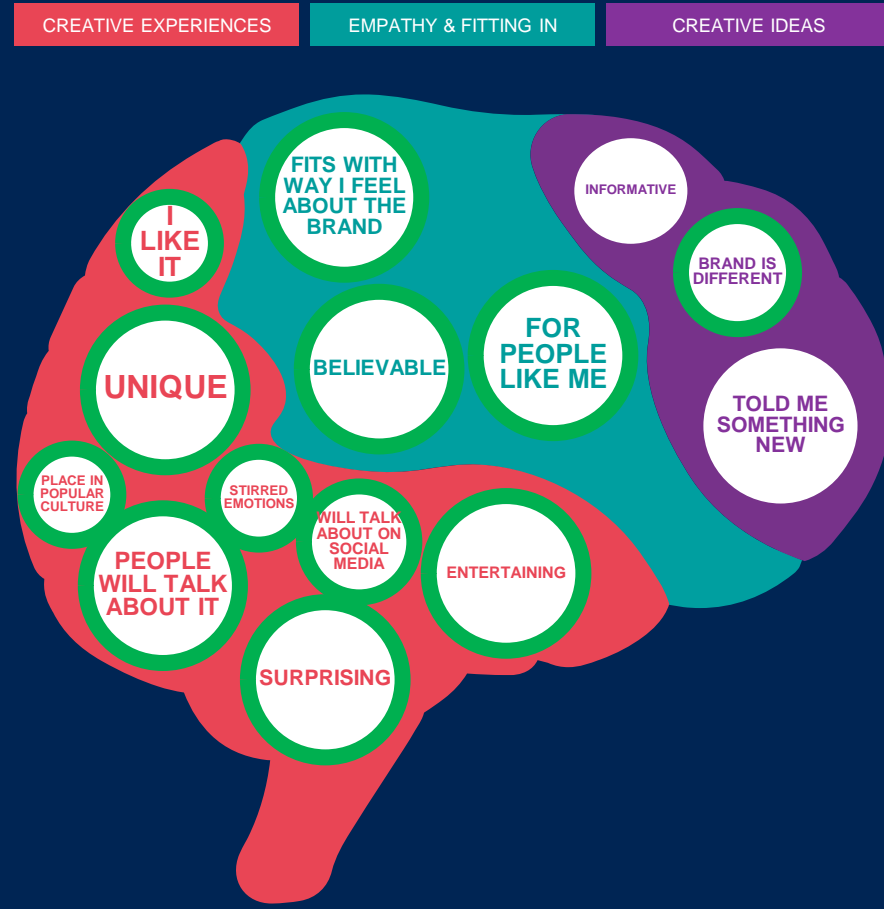
PRINGLES

Depicting people's expected behavior with the product



HEINEKEN – HOME GATHERINGS

Inspired by real-life situations



INVISALIGN

Portraying an honest struggle



CREATIVE EXPERIENCES EMPATHY & FITTING IN CREATIVE IDEAS



PRINGLES – STUCK IN

Depicting people's expected behavior with the product



CREATIVE EXPERIENCES EMPATHY & FITTING IN CREATIVE IDEAS



Sources: [AdWeek](#).

IS BELVEDERE

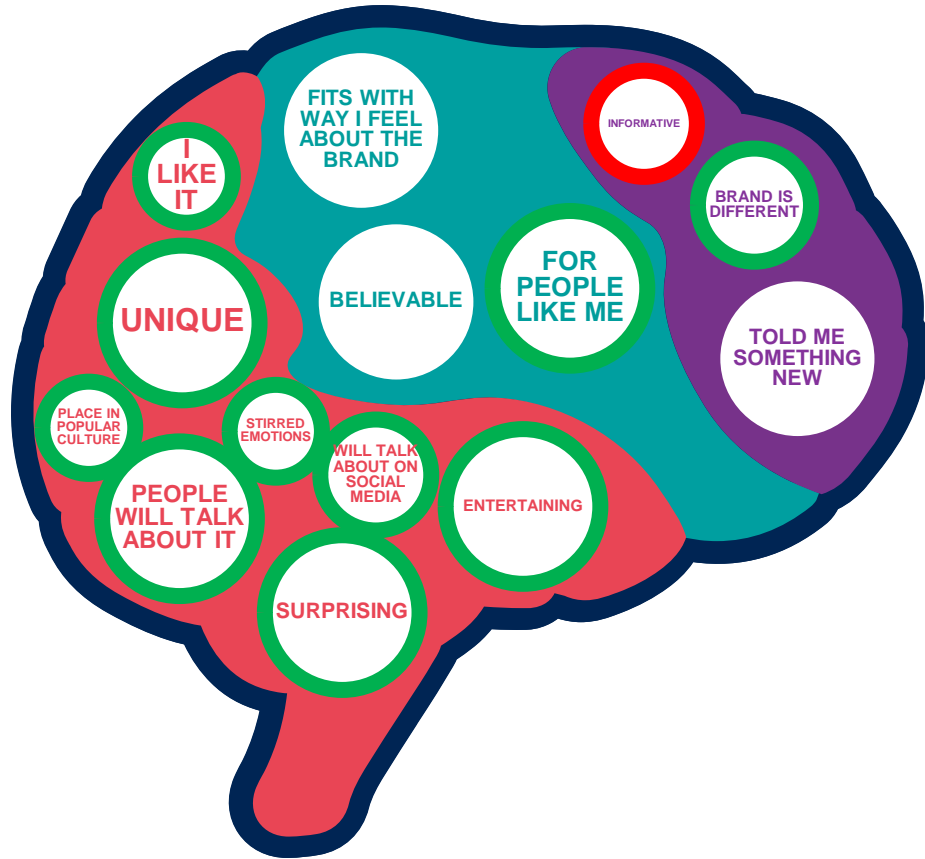
EMPTY?

OR EMPATHY?





- CREATIVE EXPERIENCES
- EMPATHY & FITTING IN
- CREATIVE IDEAS



CONTEXT

Pressure of the polycrisis: inflation, identity

TENSION

Moments of personal joy when the world around is in crisis

EXPECTATIONS

Time out, escapism, release



NURTURE EMPATHY TO TRIGGER CREATIVITY AND EFFECTIVENESS

CREATIVE EXPERIENCES

EMPATHY & FITTING IN

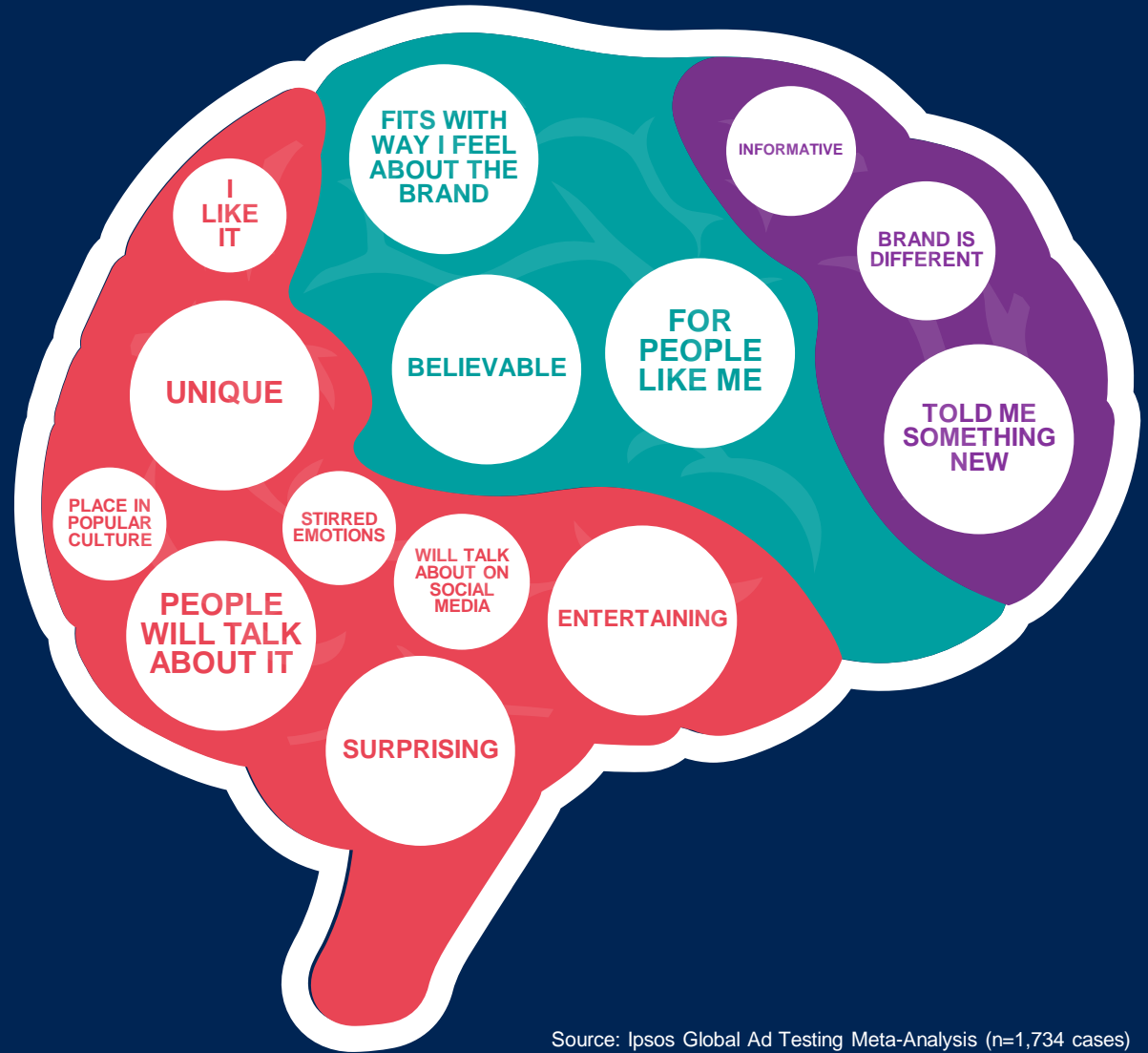
CREATIVE IDEAS

CONTEXT

TENSION

EXPECTATIONS

ADVERTISE
HERE



Source: Ipsos Global Ad Testing Meta-Analysis (n=1,734 cases)

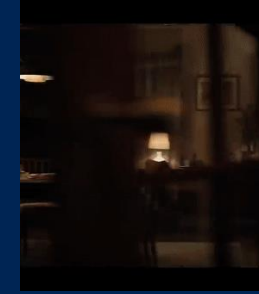
WATCH ADS HERE



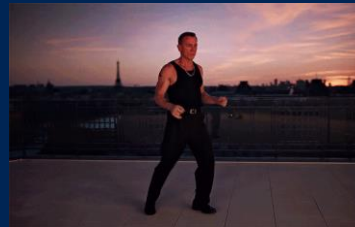
Burger King
More confusing times
<https://www.youtube.com/watch?v=9c2caQ1NjUk>



Samsung
Spider
<https://www.youtube.com/watch?v=G7YUK947LI8>



Penny
The rift
<https://www.youtube.com/watch?v=Pp2-tyEHBps>



Belvedere
<https://www.youtube.com/watch?v=qXEIXkQz0fc>



Heineken
Home Gatherings
<https://www.youtube.com/watch?v=yYHcqzLLuQQ>



Invisalign
not your parents'
<https://www.youtube.com/watch?v=BF2NbGFz2Xk>



Pringles
Stuck in
<https://www.youtube.com/watch?v=aP2up9N6H-g>

ADVERTISE
HERE

KEYS

AN IPSOS WEBINAR SERIES

Access the recording, presentations
and resources from this episode



[Webinar\] KEYS - The Empathy Effect](#)

JOIN US for our next KEYS webinar:
Thursday, June 8
11:00 & 17:00 Central European Time

THE ESG IMPERATIVE
PEOPLE | PLANET | PROSPERITY