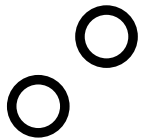




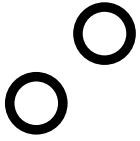
# Empathy Value Index



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# INTRODUCTION

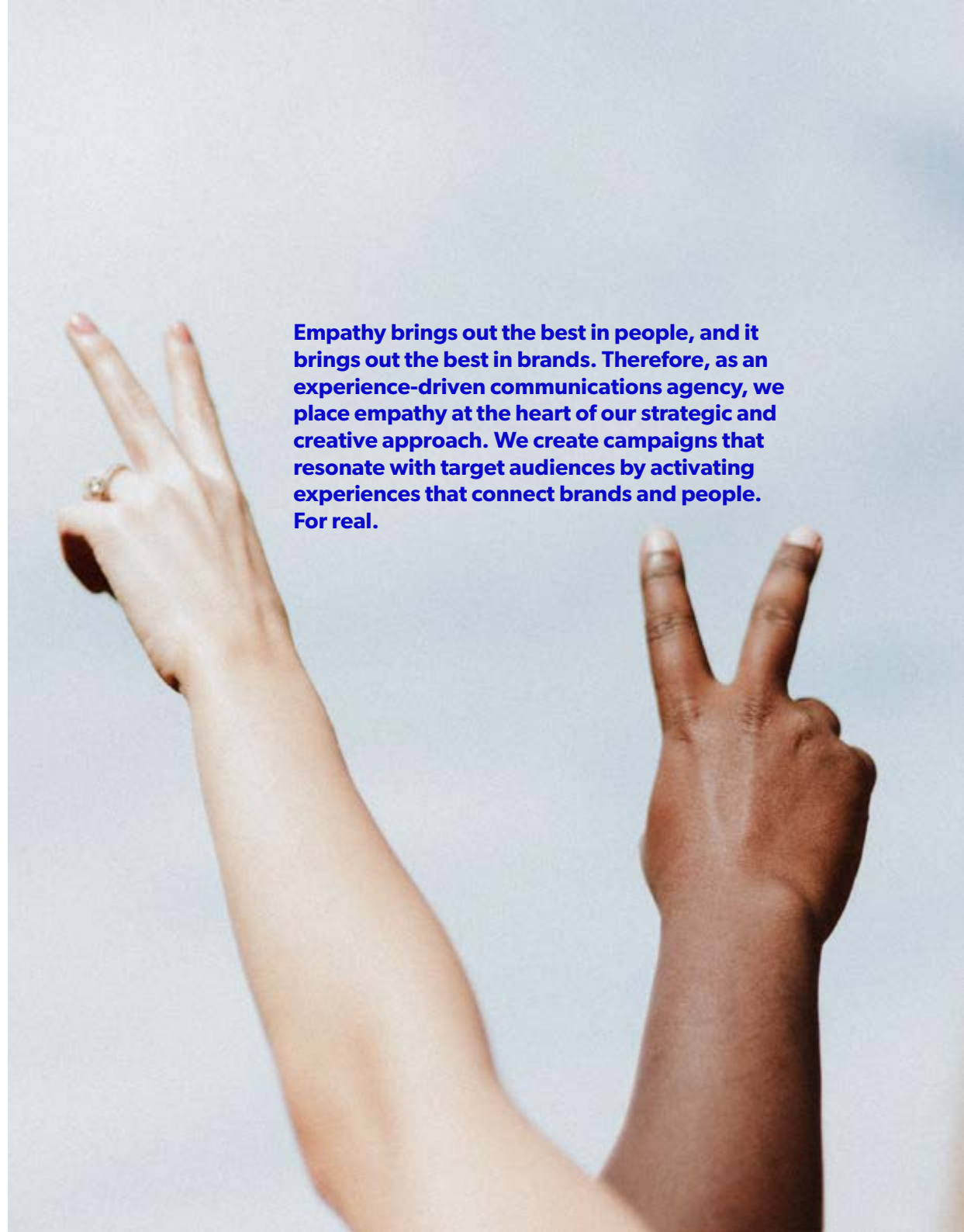
Seismic shifts have rocked our world in recent years. And although at times the great political, economic, and social divides might at times seem unsurmountable, mankind is coming together. Because no matter how much society changes, people will always have a deeply rooted need to feel connected. With each other and with the brands they give license to play.

We know this as we see it every day. But to turn that gut feeling into something tangible we wanted to develop a model that would validate the empirical. A methodology to drive your brand communication forward and help bridge the gap between brands and people. In collaboration with market research company InSites Consulting, we are proud to introduce the **Empathy Value Index**, or EVI.

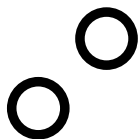
The world's first evidence-based research tool that maps the relationship between empathy and brands for actionable insights. Over 5,600 consumers ranked close to 200 leading brands in Belgium, France, and The Netherlands on 18 statements, helping us define the 4 pillars that underpin brand empathy and build lasting relationships.

In this report, we share some of the most notable insights from our survey, both overall and for Belgium specifically, revealing which brands and sectors are the most empathic and why. We not only hope you enjoy the read, we hope it inspires you to embrace the Power of Empathy. In life and in business.

Wouter Boits , CEO  
Olivier Trop, Managing Director Belgium  
Bart De Leeuw, Strategy Director



**Empathy brings out the best in people, and it brings out the best in brands. Therefore, as an experience-driven communications agency, we place empathy at the heart of our strategic and creative approach. We create campaigns that resonate with target audiences by activating experiences that connect brands and people. For real.**



# THE POWER OF EMPATHY

## in the age of cynicism

We all want to feel seen. Heard and understood. Valued for who we are and what we stand for. It is what makes empathy such an inherently human quality. Empathy allows us to place ourselves in someone else's shoes. To see things from their point of view, to recognise and understand how they might be feeling. It also means putting aside our own thoughts, assumptions, and biases, and listening with an open heart and mind.

Empathy has always been integral to civilisation, but recent events drove its importance home. Never before have we felt the need to connect quite so keenly. The pandemic not only accelerated the transformation to a digital workplace, it also made us realise the **importance of empathy**. Our professional personas fell away as we had to juggle childcare, barking dogs, and parcel deliveries whilst Zooming through online meeting after online meeting. Colleagues and clients became more three-dimensional as we peeked into each other's homes and started seeing the world through each other's eyes.

Businessolver's 2021 State of the Workplace Empathy Study reports that including empathy as a foundational value is fast becoming of vital importance in the post-COVID world. Not only do 72% of employees believe that empathy drives employee motivation, 84% of CEOs believe that empathy drives better business outcomes. From investing in mental wellbeing to embracing diversity, **leading with empathy pays**.

So does the same hold true for a brand's public persona? Do brands that **place empathy at the heart** of their internal and external communication find it easier to forge real, lasting relationships with people? Does empathy make a brand more believable? **Is it really worth investing in? Is it a must in today's market or simply a nice-to-have?**

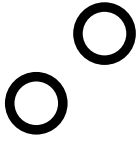
The findings of global communications group Havas give us ground to believe the empathy gap between people and brands is real. Yet consumers want to believe according to their 2021 Meaningful Brand

Report: worldwide 73% of respondents stated they are desperately seeking brands that will make a meaningful difference. The annual global survey tells us that – as far as the consumer is concerned – less than half of brands are considered to be trustworthy and **75% of brands could disappear and easily be replaced**.

With consumer cynicism at an all-time high, it is important to understand that **empathy is a two-way street**: brands need to be empathetic of customers' expectations if they want to meet them. Because only when customers see that a brand is honest, treats people fairly, has their best interests at heart, and understands how they feel, do they become empathetic towards the brand.

As we enter the Age of Cynicism, we need to **embrace the Power of Empathy**. In the world, and in the workplace. For real.

**Empathy allows us to place ourselves in someone else's shoes. To see things from their point of view, to recognise and understand how they might be feeling.**



# THE EMPATHY VALUE INDEX MODEL

Expectations are high when it comes to brand empathy. Today's customer is critical and looks towards brands to deliver a positive impact on their own customer journey and society at large. Humanity has enough to contend with, from fighting global warming to creating a more equal society, and people expect brands to play their part. Consumers want brands to mean what they say, understand what they need, make them feel heard, and make life better.

In short, brands need to **MEAN IT, GET IT, FEEL IT, and DO IT** if they want to foster the kind of connection that builds an authentic and lasting relationship with their customers. Our research shows that **each of these four pillars plays a role in establishing brand empathy**. More importantly, the Empathy Value Index details precisely how brands can achieve it.



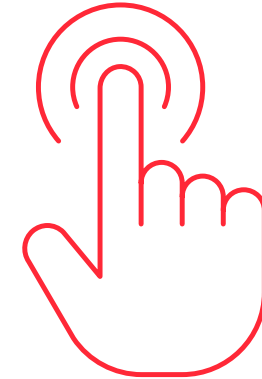
**MEAN IT**



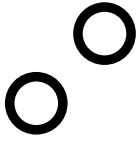
**GET IT**



**FEEL IT**



**DO IT**



## MEAN IT

People expect brands to be honest in both their communication and business dealings. This means showing real people and sharing real stories that they can relate to. In doing so, brands show they have an opinion and are not afraid to stand for something. Greenwashing or purpose washing simply will not cut it with today's savvy consumer: a brand should not overpromise or underdeliver if it wants to foster a genuine and lasting connection.



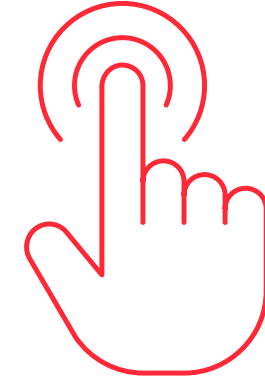
## GET IT

Consumers want their love brands to be able to see things from their perspective. Taking the time to listen to the customer and understanding what it is they actually need – what they are actually looking for in a brand – is the customer-centric approach people so desperately seek. Understanding today's consumer means knowing what they value most.



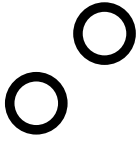
## FEEL IT

Brands that know how to strike an emotional chord with people are perceived to genuinely care about their customers. They have their customers' best interests at heart and understand how they feel if something does not quite live up to expectations. They treat customers, staff, and suppliers fairly and have their backs when support is needed.

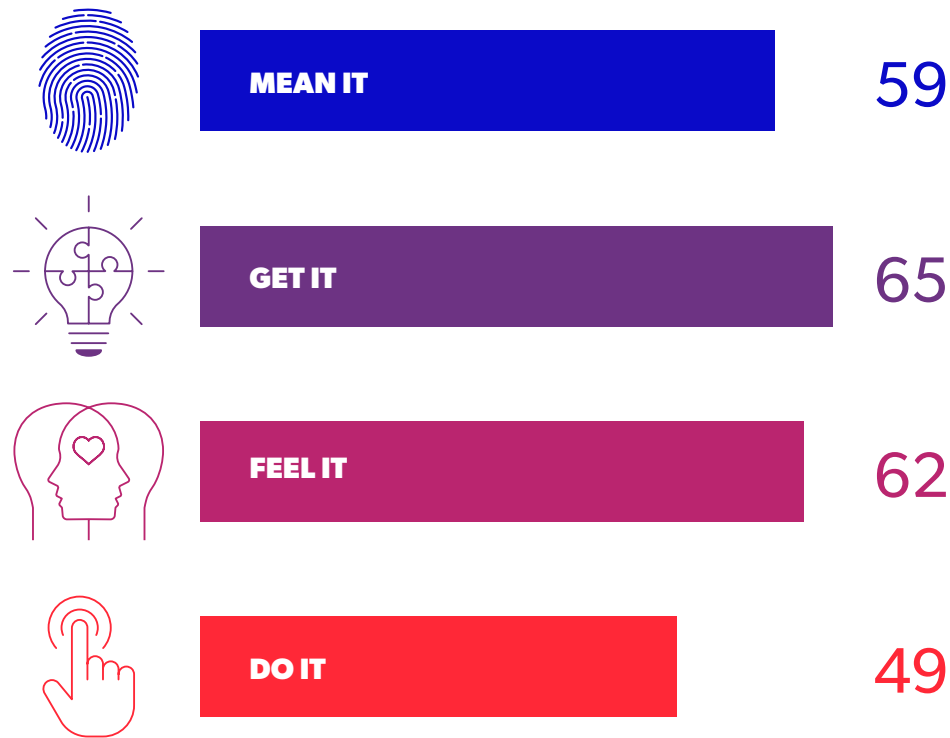


## DO IT

Empathic brands bring joy into their customers' lives. Standing for something means taking action on societal issues instead of waiting along the sidelines for others to act first. Consumers want brands that inspire people to better themselves and the world around them. The communication these brands share with the world is relevant and adds value, just as the brand provides a true experience around their products or services.



# HOW IMPORTANT IS BRAND EMPATHY TO CONSUMERS?

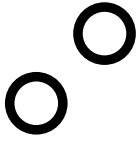


Consumers were asked to rate the importance of the 18 statements that shape the 4 pillars of the Empathy Value Index. We found that both men and women consider each of the four pillars to be important when it comes to establishing brand empathy, yet there are some minor differences. If we compare men and women, we find that women attribute slightly more weight to MEAN IT and FEEL IT than men do.

Similarly, whereas consumers aged 40-64 find it is most important that brands MEAN IT, DO IT plays more of a role for younger generations than it does with older generations. Even so, overall GET IT is shown to be the most influential factor when it comes to fostering brand empathy, followed by FEEL IT, MEAN IT, and DO IT respectively.

Three out of four (76%) of Belgian consumers told us that it is 'important' or 'very important' that a brand is always honest. The vast majority also believes it is (very) important that a brand truly listens to its customers (75%), genuinely cares about its customers (74%), treats them fairly (72%), and understands what they need (72%).

Over 60% of respondents additionally agree that it is important that a brand does not overpromise, has its customers' best interests at heart, understands what they feel is important, and provides a true experience around their products or services if they want to be seen as empathic.



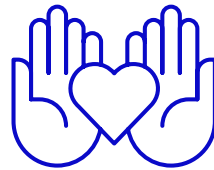
## The most important qualities of an empathic brand for the Belgian consumer are



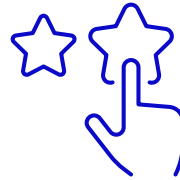
Always honest



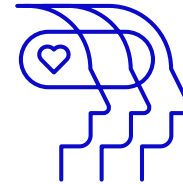
truly listen



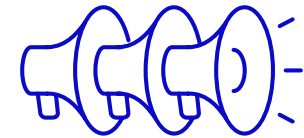
genuinely care



provide a true experience



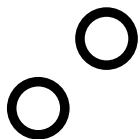
understand needs and feelings



never overpromise

**Being an honest brand that truly listens to its customers and genuinely cares about them are the top three most important considerations for Belgian consumers.**





# BELGIUM'S MOST EMPATHIC GENERATION

The 75 leading brands we asked Belgian respondents about were given **an average empathy score of 35** across the four pillars MEAN IT, GET IT, FEEL IT, and DO IT. Dutch respondents were slightly more positive, awarding the leading brands nationwide an average empathy score of 41. Equally, French consumers assessed leading brands in France on empathy and gave them an average score of 41 on the Empathy Value Index.

Overall, **younger generations take a much more empathic view of brands**, with Millennials and Centennials awarding brands 44 for empathy. In fact,

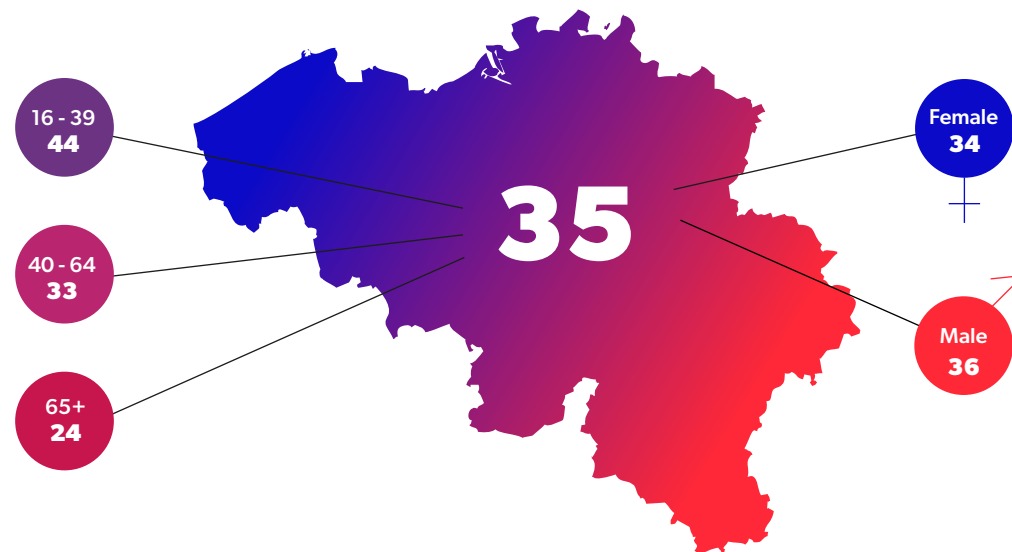
**Younger generations see brands as much more empathic than older generations, across industries and countries.**

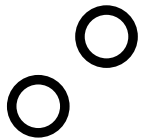
it is thanks to their positive outlook that brands today enjoy the level of empathy they do. These are the generations that expect brands to take responsibility and help create a better future and a more equal society for all.

If we were to only take the Baby Boomers and Lost Generation into account, you would be forgiven for thinking all hope is lost. The over 65's in Belgium have very little empathy for brands, rating them just 24 on the EVI. They may have burnt their bras for women's rights, but equality in the workplace was never truly theirs. From holes in the ozone layer to the dotcom bubble,

they have seen the effects of consumerism firsthand and are understandably critical of brand intentions.

Generation X - as behaves the generation that refused to be defined - sits almost precisely in the middle, scoring brand empathy at 33. The latchkey generation tends to be self-sufficient, resourceful, and individualistic and tries to overcome challenges on their own. They want to believe that brands will have their best interests at heart, but remain on the fence with regards to how far brands are willing to go to make life better.





# BELGIUM'S MOST EMPATHIC INDUSTRIES

The brands we surveyed respondents on came from 19 different categories, ranging from soft drinks to automotive.

**Retail was found to be the most empathic sector in Belgium**, achieving 41 on the Empathy Value Index. In a way, it makes sense that brick-and-mortar stores perform best as they offer the original fully immersive experience. Whether supermarket or sporting goods chain, as soon as you step across that threshold, you enter their world.

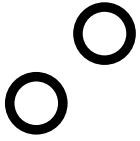
The second most empathic sector was found to be **Entertainment and Games**. Considering we have spent the best part of the last two years living in our own bubbles with social activities limited to the bare minimum, this is not entirely surprising. From streaming platforms to games providers, the personalised suggestions of AI and machine learning helped us feel part of something bigger.

The third place is reserved for the **Health Insurance** sector. It is easy to see why it has come to play such an important role for today's consumer. As the pandemic shook the world to its core, a lot of goodwill was generated for healthcare, putting it firmly top of mind for consumers. Social media on the other hand took a nosedive, dropping almost to the very bottom of our empathy rankings. Fake news, scaremongering tactics, and divisive storylines are firmly out of favour in 2021.



<b>Retail</b>	<b>41</b>	<b>Waters &amp; Soft Drinks</b>	<b>33</b>
<b>Entertainment &amp; Games</b>	<b>39</b>	<b>HR Services</b>	<b>33</b>
<b>Health Insurance</b>	<b>38</b>	<b>Telecom</b>	<b>33</b>
<b>Beauty &amp; Personal Care</b>	<b>37</b>	<b>Banking &amp; Insurance</b>	<b>32</b>
<b>Postal &amp; Logistics</b>	<b>37</b>	<b>Automotive</b>	<b>31</b>
<b>Electronics</b>	<b>37</b>	<b>Energy</b>	<b>31</b>
<b>Sweet Snacks</b>	<b>37</b>	<b>Takeaway</b>	<b>30</b>
<b>Sportswear</b>	<b>35</b>	<b>Social Media</b>	<b>30</b>
<b>Media</b>	<b>35</b>	<b>Beers</b>	<b>28</b>





## BELGIUM'S MOST EMPATHIC BRANDS

Close to 1,900 respondents were asked to share how empathic they consider Belgium's leading brands to be. It is interesting to note that **the most empathic brand only achieves an EVI score of 48 across the four pillars**. Food retailer **Colruyt** takes the win as the most empathic brand in Belgium by both users and non-users. Thanks to its no-frills approach and highly competitive price-busting tactics, customers feel understood. In economically uncertain times, they want value for money. Lidl and Albert Heijn take spots 5 and 6, for much the same reason. These brands GET IT when it comes to understanding their customers' priorities and consumers can FEEL IT.

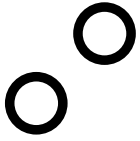
Embodying DO IT, the second most empathic brand in Belgium is **Tony's Chocolonely**. This Dutch love brand took the market by storm upon its nationwide introduction in 2018. With its quirky, colourful, and positive messaging, Tony's Chocolonely does not just bring joy into people's lives, it takes action on societal issues by ensuring ingredients are sustainably sourced and wages are fair. Each chunk is a piece of guilt-free pleasure in a world dominated by societal struggles.
















It is not just physical retail outlets that dominate the EVI rankings. Online retailer **Bol.com** takes the joint third place for consumers, positioning the brand hot on food retailer Colruyt's heels and nudging it ahead of Lidl and Albert Heijn for brand empathy. With the pandemic keeping us all close to home, ecommerce enjoyed a massive boost. Bol.com's customer-centric approach shows that they not only GET IT, but that customers can FEEL IT. Their open communication style is highly relatable for consumers and shows Bol.com MEANS IT.

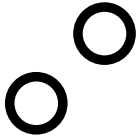
Sharing the third place in our brand empathy rankings is **CM or Christelijke Mutualiteit**. Belgium is a complex country with a social mindset. The national healthcare system gives citizens a wide variety of choice when it comes to social insurance providers, and CM outperforms as the most approachable provider. They understand people's concerns and practical questions as they are able to place themselves in clients' shoes. In short, CM GETS IT.

Not only did we enquire how consumers experience these brands, we also distinguished between brand users and non-users. Unsurprisingly, users rated brands to be more empathic than non-users, and the uplift is impressive. **On average, brand users rate brands 136% more empathic than non-users, with outliers up to 200%, proving that brand loyalty and empathy go hand-in-hand.**

**Food retailers such as Colruyt, Lidl, and Albert Heijn are top performers across all industries, although online retailers such as Bol.com are snapping at their heels.**



	EVI overall score	 MEAN IT	 GET IT	 FEEL IT	 DO IT
 Colruyt	48	48	48	50	45
 Tony's Chocolonely	45	46	45	46	42
 CM	44	48	47	47	36
 Bol.com	44	44	48	44	41
 Lidl	43	43	48	47	36
 Albert Heijn	41	38	46	42	38
 Flair	41	43	42	40	38
 Nintendo	40	41	43	39	39
 Google	40	41	43	38	40
 Apple	40	38	42	39	42
 Dove	40	42	43	37	39








# THE IMPACT OF BRAND EMPATHY ON THE BOTTOM LINE

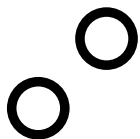
Which is all good and well, and aspirational as it sounds to be considered an empathic brand, does brand empathy actually impact the bottom line? Well, yes. Quite a bit in fact. We set out to uncover the relationship between brand empathy and funnel KPIs and have found that **empathic brands perform two to four times better depending on the metric.**

Questions such as ‘which of the following brands would you consider buying in the future’; ‘which do you intend to buy’; ‘to what extent are you loyal to these brands’; ‘how closely do you feel these brands align with your own personality’; and ‘to what extent would you miss these brands if they no longer existed’ helped us grasp brand empathy’s impact on funnel KPIs such as purchase consideration, intent, brand loyalty, brand essence, and identification with a brand.

**We found that the higher a brand scores on the Empathy Value Index, the more likely consumers are to identify themselves with it.** Four times more likely in fact. This positive identification in turn is reflected in how likely consumers are to consider the brand (x2.7), buy it (x2.8) and become loyal (x3.4) to the brand.

**If people perceive a brand as empathic, they are much more likely to consider, buy, and become loyal to this brand.**

	Scoring 1-2	Scoring 4-5	
 Consideration	26%	71%	<b>x2,7</b>
 Purchase Intent	25%	69%	<b>x2,8</b>
 Loyalty	19%	64%	<b>x3,4</b>
 Brand Identification	9%	36%	<b>x4,0</b>
 Brand Essence	19%	64%	<b>x3,4</b>



# EXECUTIVE SUMMARY

With the Empathy Value Index, we have set out to prove the correlation between brand empathy and funnel KPIs such as purchase intent and brand loyalty. To do so we needed actionable, evidence-based information to build our model. Our research with InSites Consulting has led to four key insights that shape the Empathy Value Index, or EVI. EVI qualifies what makes people choose one brand over another, allowing us to identify which steps a brand can take to increase brand empathy.

## 1. empathy is a four-legged chair

These are MEAN IT, GET IT, FEEL IT, and DO IT. Each of these pillars effectively measures a part of brand empathy and is considered to be important. Customers expect a brand to stand for – and deliver on – something they can believe in and connect with. The four pillars represent the many touchpoints that make a brand promise believable, tangible, and transparent.

## 2. brands fall short on empathy

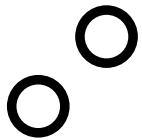
Brands in sectors like retail, entertainment, and health care are considered to be most empathic, although this is relative. The average performance of brands on empathy ranges from 35 (Belgium) to 41 (The Netherlands and France). Across all brands we identified FEEL IT and MEAN IT as priority areas. This means being honest, treating customers fairly, having their best interests at heart, and understanding how they feel.

## 3. the older, the more cynical

Our research finds that the four pillars of empathy are almost equally important to all age groups. That being said, there are some nuances to be found in which pillars are more important to different generations and how empathic they perceive brands to be. Globally speaking, 16 to 39 year olds have a fairly empathic view of brands, whereas older generations have a more cynical take on brand empathy.

## 4. empathy: the holy grail

Finally, we find that there is a positive correlation between brand empathy and funnel KPIs such as consideration, purchase intent, and loyalty. Brands that are more empathic are more likely to perform better on those KPIs, especially among users. Depending on the metric, performance is two to four times higher when customers feel a connection with the brand, proving that leading with empathy really does pay.

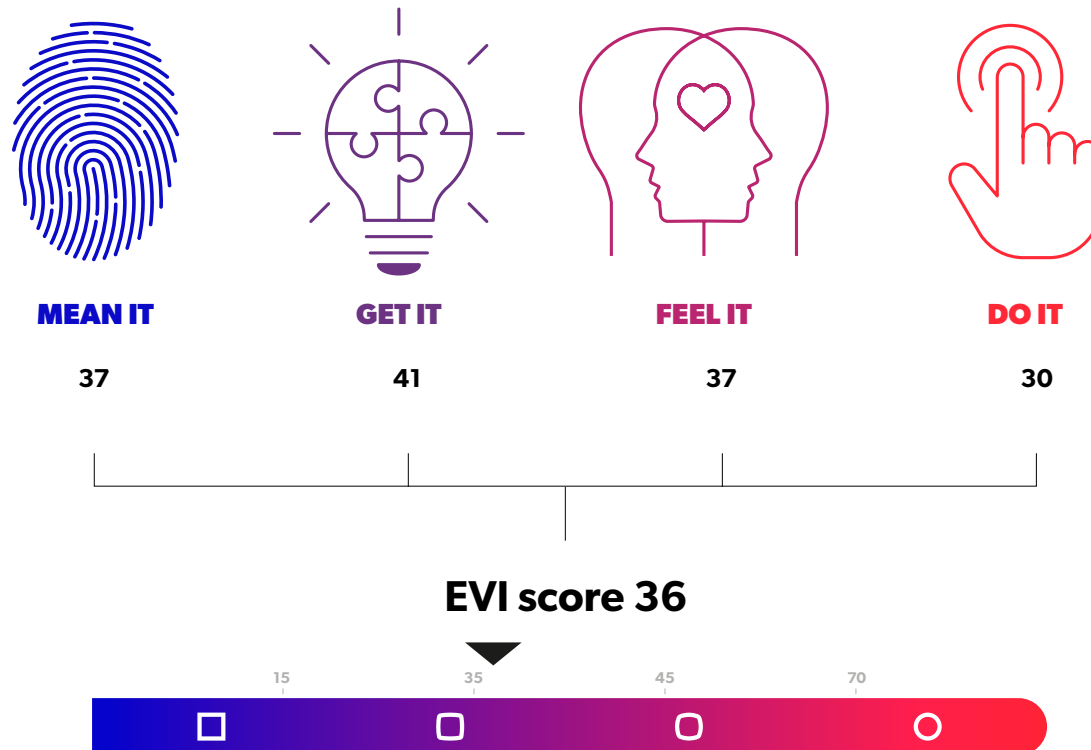


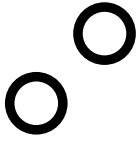
## METHODOLOGY

In defining the four pillars of empathy, The Oval Office and market research company InSites Consulting used scientific analyses to both validate their consistency and confirm that each pillar has a significant, relatively strong, and positive relationship to the variable 'empathy'. Using explicit questions, we were able to identify how important the individual aspects within each of these pillars are to the consumer. The Empathy Value Index is calculated by taking the average value of the sum of the four pillars, with each pillar being weighted equally.

For the 2021 Empathy Value Index Report, we asked respondents to rank brands from 1 to 5 (with 1 being 'not at all important/strongly disagree' and 5 being 'very important/strongly agree') on each question. The top two ranking answers for each pillar were then averaged to create the brand's rating on this pillar. In other words, the score per pillar is the average of how many people associate the underlying elements with a brand. A brand's overall EVI is the average of the sum of the four pillars.

Our online survey was carried out in Belgium, The Netherlands, and France between 31 August and 14 September 2021. 5625 people took part, with a minimum of 100 completes per brand, per country, delivering hard quota on age and gender.





# HOW EMPATHIC IS YOUR BRAND?

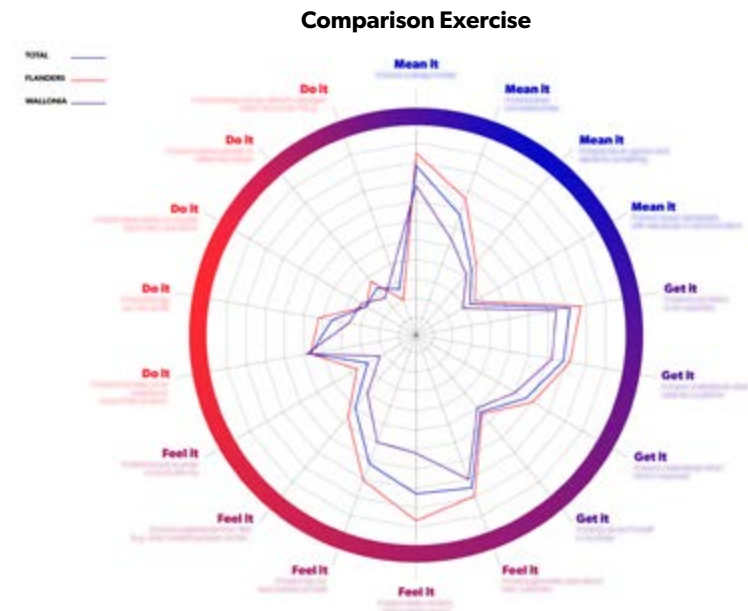
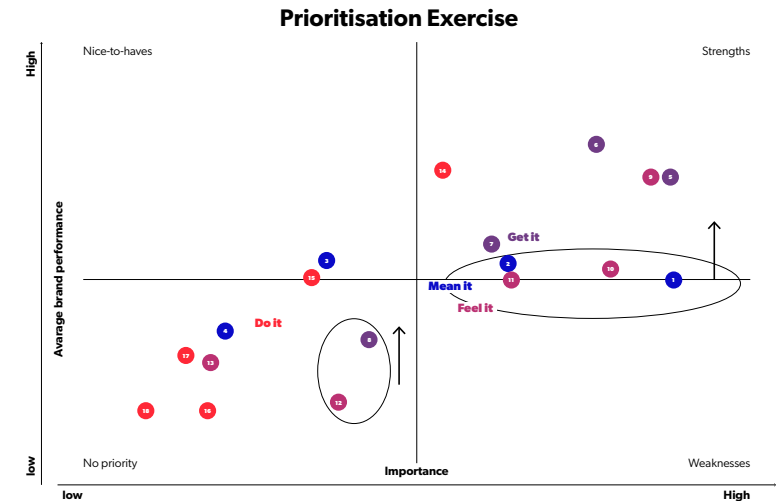
A brand's overall ranking on the Empathy Value Index is the average of their score on the four pillars MEAN IT, GET IT, FEEL IT, and DO IT. Each brand meets some or all of the points to a certain degree, but our examples show how one pillar can outweigh the others when we look at a brand's personality. People strongly associate a brand with certain pillars, whereas other pillars take a backseat in their mind's eye. In an ideal world, a brand should rank highly across all pillars to ensure it maximises brand empathy.

If you would like to know more about how your brand performs on the Empathy Value Index, either individually or compared to your competitors, then be sure to reach out to us. We have developed a series of workshops that will reveal public perception of your brand and that will set us on a strategic path to help increase brand empathy and achieve your marketing objectives.

As an experience-driven communications agency, we place empathy at the heart of our strategic and creative approach. We take the time to get to know you, your market, and your target audience, so that we can uncover what inspires, excites and drives people to your brand. The campaigns we create are designed to connect brands and people by activating experiences. Together we will harness the Power of Empathy for your brand. For real.

For the answers to all your brand empathy questions, contact our Strategy Director Bart De Leeuw.  
bart@theovaloffice.be  
+32 486 13 91 51

[www.theovaloffice.be/be-en/empathyvalueindex](http://www.theovaloffice.be/be-en/empathyvalueindex)







Empathy Value Index

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**Want to know how your  
brand performs on the  
Empathy Value Index?**

Request for your tailormade EVI assessment  
[bart@theovaloffice.be](mailto:bart@theovaloffice.be)

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