

CARAT

Designing for People

Brand EQ US Report

**Special Edition: The most emotionally
intelligent brands among women**

March 2023



Table of contents

PART 1 – Brand EQ is more important than ever	3
PART 2 – What drives Brand EQ among women	6
PART 3 – Delivering higher EQ experiences	16



**Brand EQ is
more
important
than ever**



Better human understanding drives accelerated growth

At Carat, we are fascinated by people and what drives their behavior and attitudes. We are equally fascinated by brands, how they grow and what they mean to people. This means that we are always seeking to push the boundaries of how we can better connect the two. We call the framework we use to build better experiences for people with brands **Designing for People**. Building more emotionally intelligent experiences that give brands a competitive advantage is a key outcome of our work. This is why we devised the Brand EQ technique - to see areas of strength and areas for improvement for brands. Our key findings:

1. High EQ and high growth can be correlated.

We set out to explain emotional intelligence (EQ) to better understand the quality of experiences that people have with brands, and whether 'more human' brands are more successful. We found that the Top 20 Brand EQ brands massively outperform notable indices like the S&P 500 and FTSE 100.

2. More emotionally intelligent brands grow more quickly.

In 2020, we found that the most emotionally intelligent brands grew more quickly than their peers and the major stock price indices. Since then, we have found that this trend had been accentuated even further. Our [Brand EQ Report](#) dives into the factors that contribute to high EQ for key category leaders in the US.

Inspired by the insights from our last report, we wanted to explore which brands excel at connecting with women*. The brands with the highest EQ are not only identifying and designing around women's unmet needs, but also adapting to provide products and services that have evolved to fit their new ways of living. It is important to provide meaningful value at every milestone along the journey, and celebrate their strengths.

*Women are all respondents who self-identified as a women in Carat's Global 2021 Brand EQ Study



How we define Brand EQ

To define Brand EQ, we took inspiration from the work of Daniel Goleman (1995), who developed a model of EQ with a specific set of drivers. We used five drivers in our work on Brand EQ.

Our goal is to understand which of the US's biggest brands best mirror this very human quality and whether there are transferable learnings from these high performers.

Self-Awareness
(confidence, recognition of feelings)
“This brand seems to know what it stands for.”

Self-Regulation
(self-control, trustworthiness, adaptability)
“This brand behaves with honesty and integrity.”

Motivation
(drive, commitment, initiative, optimism)
“This brand tries hard to deliver a good experience.”

Empathy
(understanding others, feelings, diversity, political awareness)
“This brand understands people like me and what we need.”

Social Skills
(leadership, conflict management, communication skills)
“This brand always communicates in a clear and meaningful way.”



02

What drives Brand EQ among women



US Top 20 emotionally intelligent brands among women

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5. 	6. 	7. 	8. 
9. 	10. 	11. 	12. 
13. 	14. 	15. 	16. 
17. 	18. 	19. 	20. 

US Top 20 emotionally intelligent brands among women versus general population

	Women Rank	General Population Rank
Oreo	1	1
Netflix	2	3
Kellogg's	3	7
Google	4	4
Amazon	5	5
Starbucks	6	17
Heinz	7	12
Visa	8	2
McDonalds	9	15
Nike	10	16
Pepsi	11	14
Coca Cola	12	8
Samsung	13	6
Disney	14	11
PayPal	15	9
Mastercard	16	13
KFC	17	18
Subway	18	20
Pampers	19	26
Gillette	20	10

*Women are all respondents who self-identified as a women in Carat's Global 2021 Brand EQ Study

Methodological note: Global 2021 average ranking per brand across 15 markets

Green – higher than women | Grey – same as women | Red – lower than women

We selected four high performing brands across different categories to understand what makes them resonate more with women

	Women Rank	General Population Rank
	6	17 -11
	19	26 -7
	10	16 -6
	3	7 -4

Starbucks celebrates & drives connections between women



Women give Starbucks more credit for meaningful communication.

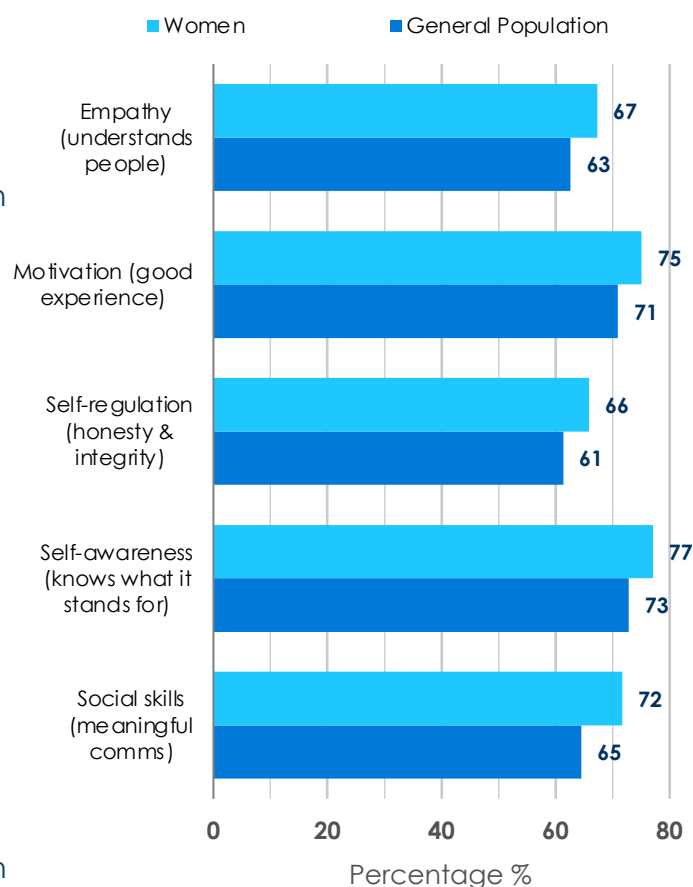
Starbucks has the biggest difference in rank among women (#6) versus the general population (#17).

Starbucks outperforms on every Brand EQ component among women versus the general population, scoring highest on Self-awareness, followed by Motivation. The largest difference in performance is Social Skills, which is 7 points higher versus the general population.

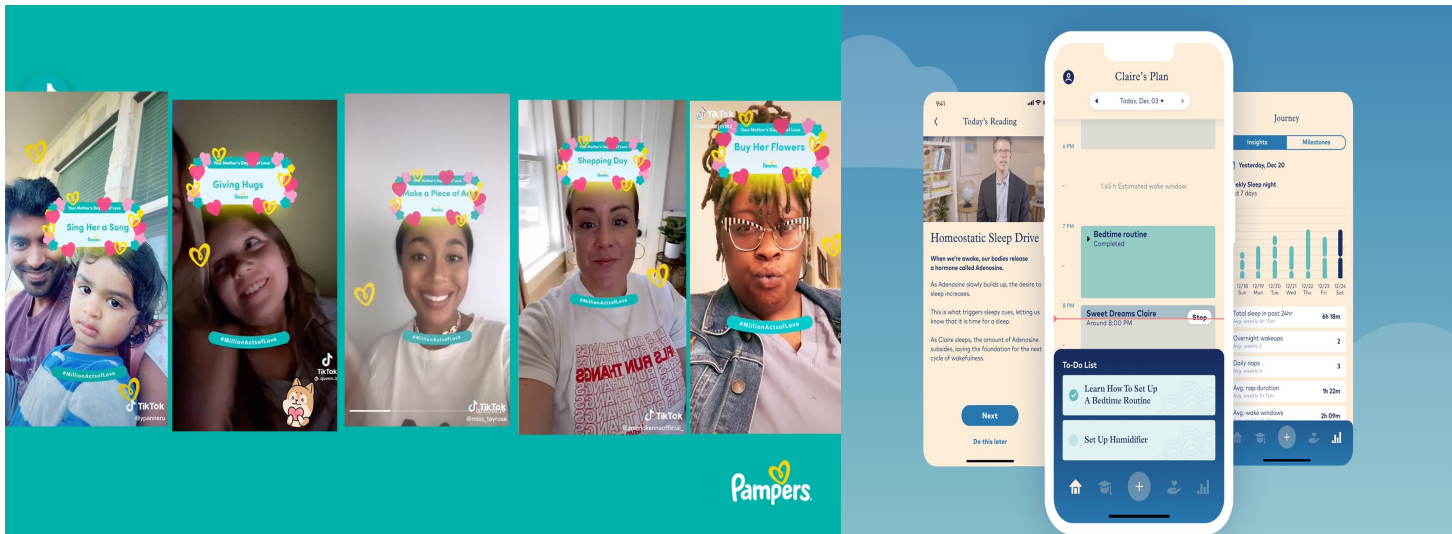
Starbucks creates connection and community while customizing communications by leveraging Instagram highlights and appropriate TikTok Influencers, especially to engage with younger women. In January 2023, their three-part winter challenge (Lattes & Learning, Cold Brew & Books, Coffee & Crafts) encouraged women to build more connection through an activity with a friend and coffee.¹ Starbucks also launched products, like Siren's Blend, now a core offering, that celebrate all the women who contribute to each step of coffee's journey – from farmer to cup.²

The Positivity Score for Starbucks among women ages 35 and below is 68, and among ages 35 and above is 53, demonstrating that the brand does especially well resonating with Gen Z and Millennial women.

Starbucks EQ components performance



Pampers supports women through every milestone



Women think Pampers is much more empathetic.

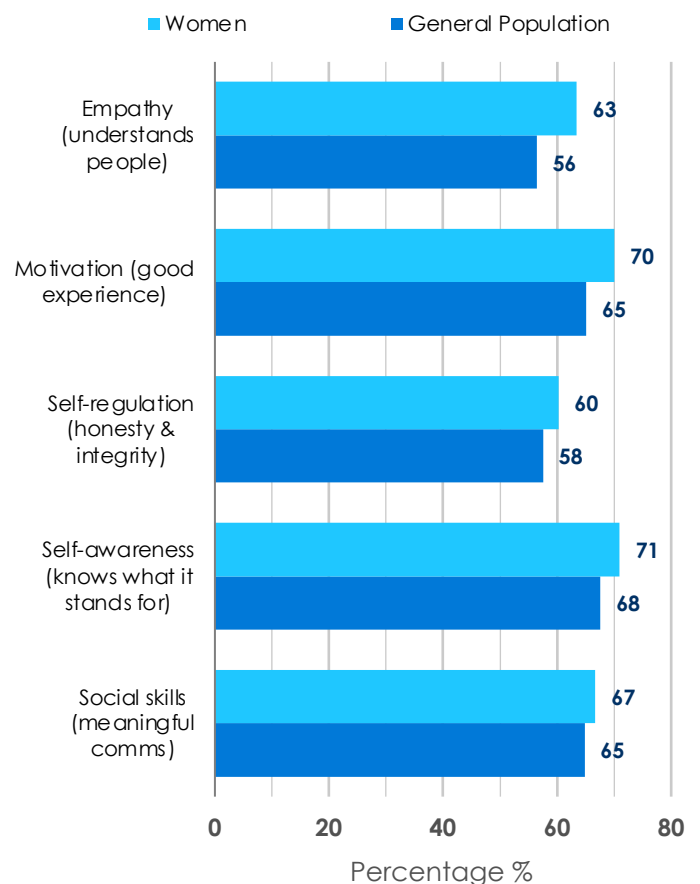
Pampers has the second biggest differences in total EQ rank between women (#19) and the general population (#26).

The largest notable differences between women and other audiences is Empathy.

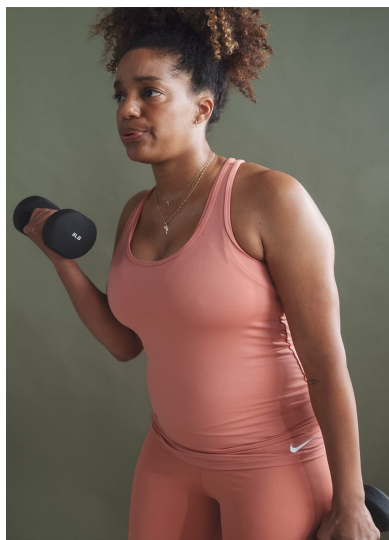
Pampers understands that recent years have been especially difficult for families, with women feeling burnt out under the weight of expectation. On Mother's Day 2021, Pampers launched their #MillionActsofLove movement, teaming up with Shay Mitchell to encourage and remind moms of the joy of parenting through small acts of kindness. Activating across many social platforms and the Pampers App, women were able to share meaningful moments with each other through digital notes and virtual high-fives.³ Pampers also provides tools to help women at every milestone of their baby's development – from pregnancy (baby shower ideas, birthing classes), to parenting (Smart Sleep Coach app, potty training guides).

The Positivity Score for Pampers among women ages 35 and below is 71 and among ages 35 and above is 74, indicating that Pampers is a reputable and recognized household brand.

Pampers EQ components performance



Nike designs for women's unmet needs



Nike scores equally strong on self-awareness and motivation.

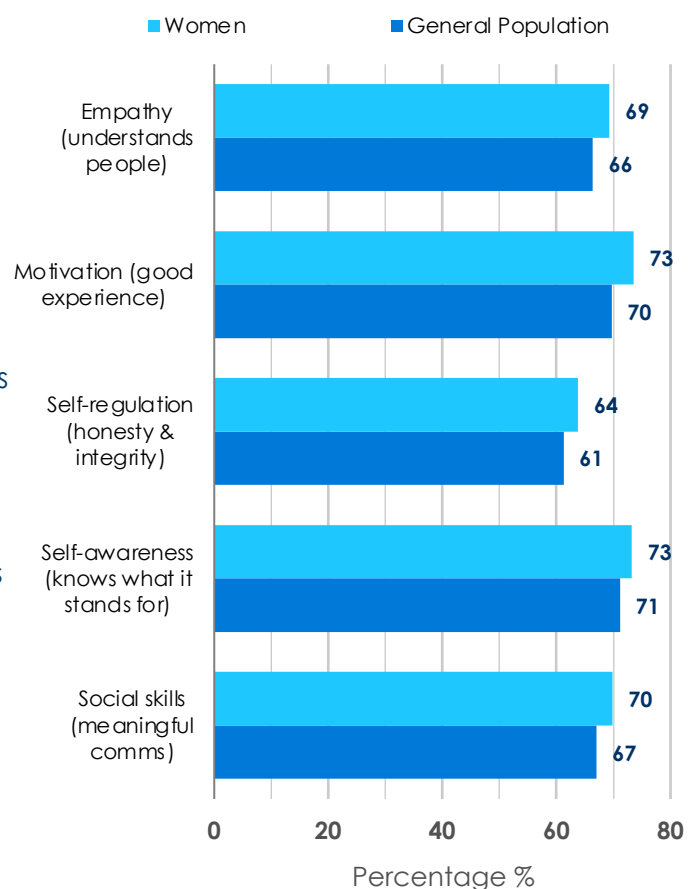
Nike is stronger on Brand EQ among women (#10) versus the general population (#16).

Nike performs strongly on Self-Awareness (73%) and Motivation (73%).

Nike brings inspiration and innovation to women. They identify women's unmet needs and create products and services to meet them – from the first built in sports bra to its pro hijab.⁴ Moving past Allyson Felix's NY Times Op-ed controversy that revealed how Nike offered a 70% pay cut while she was pregnant, Nike has since made efforts to support women in pregnancy and parenthood. Nike launched “(M)ove Like a Mother” in its Nike Training Club App in August 2022 to help guide women with postpartum wellness. Additionally, Nike partners with women who are the best in their game, like Serena Williams, Shelly-Ann Fraser-Pryce, and Bianca Williams in their recent campaign promoting Nike's new line of pregnancy and postpartum athleticwear.⁵

Nike has the highest Positivity Score both among women ages 35 and below at 78 and among ages 35 and above is 75.

Nike's EQ components performance



Kellogg's evolved to meet new standards among women



Kellogg's Self-awareness is significantly higher among women.

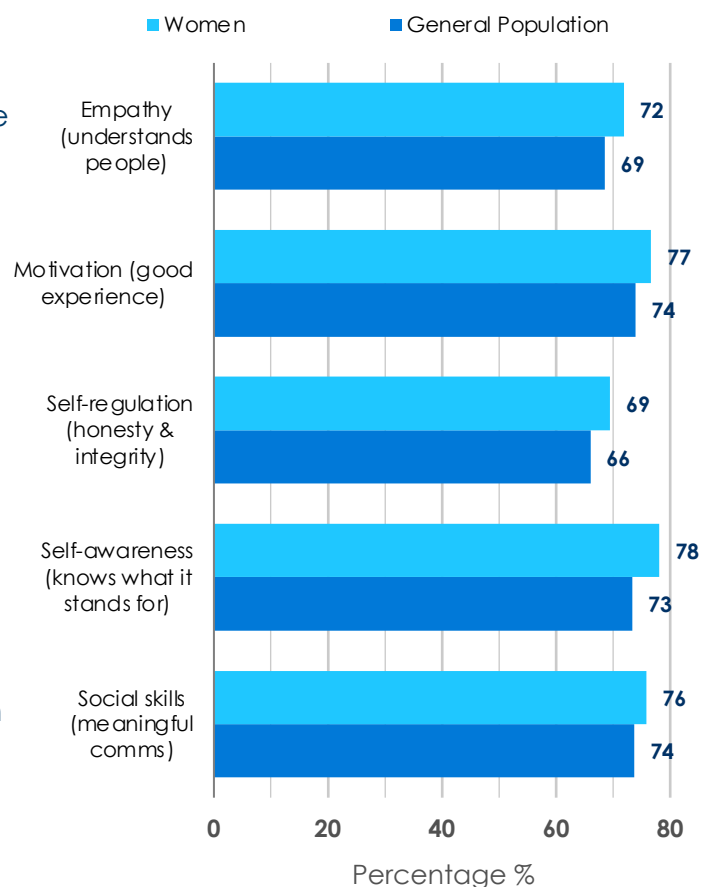
Kellogg's ranks #3 in overall top brands among women and has a 4-point difference versus the general population.

Kellogg's high Self-Awareness, Motivation, and Social Skills contribute to its strong Brand EQ. The brand is especially higher on Self-Awareness among women (78%) versus the general population (73%).

Kellogg's has evolved from their classic red swimsuit Special K diet to keep pace with women's wellness expectations. As women started turning to more high protein and low sugar foods, Kellogg's launched new products like Special K Zero, RXBAR granola and cereal, and Kashi Go Protein Waffles.⁶ Kellogg's also modified products, like Frosted Flakes, to have less sugar, giving mothers more confidence in the foods that power their children.⁷

The Positivity Score for Kellogg's among women ages 35 and below is 65 and among ages 35 and above is 86. The brand resonates significantly more with women over 35.

Kellogg's EQ components performance





Delivering higher EQ experiences



Three steps to boost your EQ brand building credentials among women

01

Identify & design around unmet needs

Today's women have ever-changing needs. High EQ Brands win when they have deep empathy and understand the challenges women face and therefore can identify solutions and innovate products to meet women's needs. Kellogg's is a great example of a brand that evolved from the "Special K diet" brand to one that has a variety of products in line with current wellness trends that focus on high protein and low sugar – RX cereals, Special K Zero, and Kashi Go Protein Waffles.

02

Dispel tropes and celebrate strengths

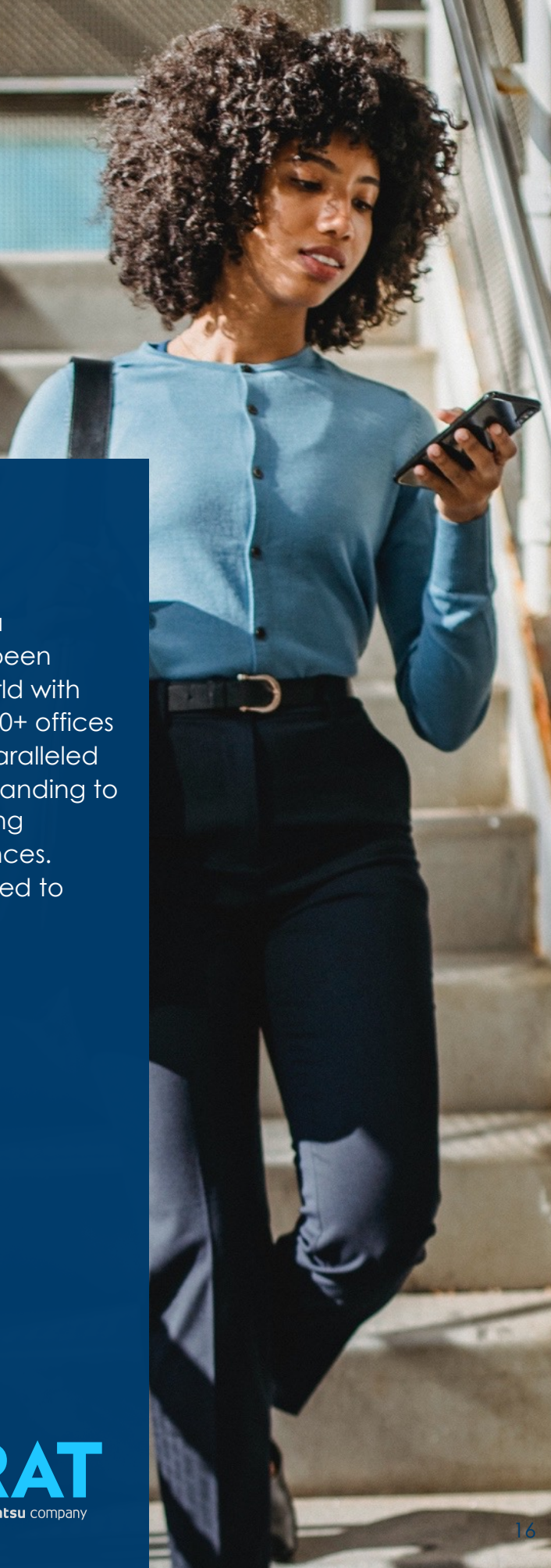
Brands with high EQ among women leverage media and comms to celebrate women's strengths while pushing back against unrealistic portrayals and expectations of women. Nike's "(M)ove like a Mother" helps educate postpartum women in their journey toward recovery, while Starbucks' Siren's Blend core coffee product celebrates all the women that touch the beans – from farm to cup.

03

Add meaningful value throughout the journey

As women's lives become more complex, so does the customer journey that we reach her across. Therefore, it is more important than ever for brands to add meaningful value throughout her entire life experience. Brands with high EQ that resonate with women are helping them at every step – like Pampers educating women at each milestone from pregnancy to parenthood, while providing a forum to celebrate small wins along the way.





About Carat

Named a leader amongst global media agencies by Forrester, Carat has often been ranked the #1 media agency in the world with over 10,000 experts, operating across 190+ offices in 135+ countries. Carat delivers an unparalleled capability to unlock real human understanding to connect people and brands by designing powerful and engaging media experiences. Carat is a Dentsu company and privileged to work with some of the most storied and innovative brands in the world.

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