

**2019 EDELMAN
TRUST BAROMETER SPECIAL REPORT**

In Brands We Trust?



Edelman

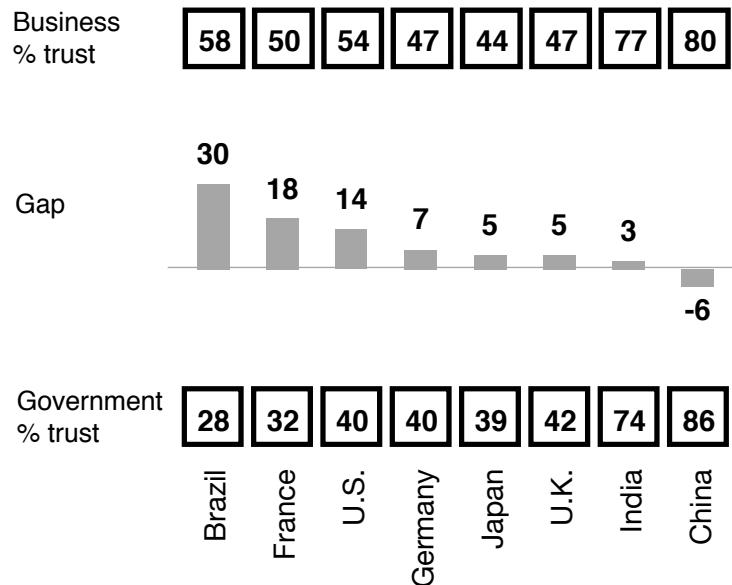


PEOPLE PUT THEIR TRUST IN BRANDS

2019 Edelman Trust Barometer

Business more trusted than government

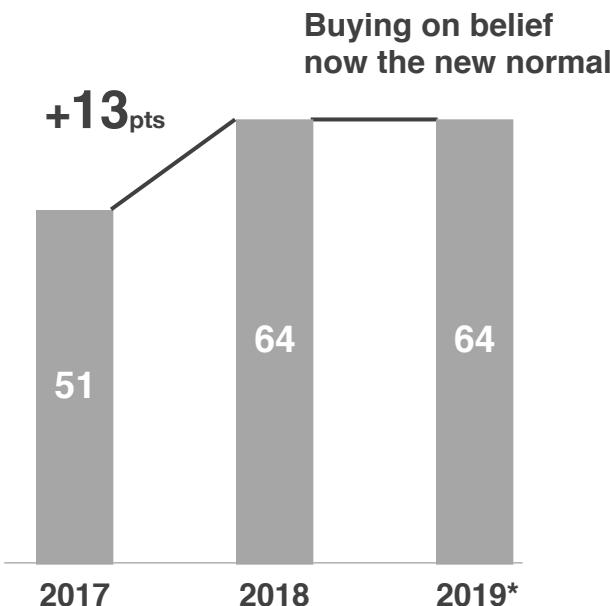
Gap in trust, business vs. government



2018 Earned Brand

Brands expected to take a larger role in society

Percent who are belief-driven buyers



2019 Edelman Trust Barometer

Trust impacts buying

“

A good reputation may get me to try a product, but unless I come to trust the company behind the product, I will soon stop buying it”

67%
agree

2019 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 27-market average.

2018 Edelman Earned Brand. Belief-driven buying segments. 8-market average. Belief-driven buyers choose, switch, avoid or boycott a brand based on its stand on societal issues.

*2019 Edelman Trust Barometer Special Report: In Brands We Trust? Mobile Survey. Belief-driven buying segments. 8-market average.

THE EVOLUTION OF BRAND TRUST

Can I trust you to do what is right with ...

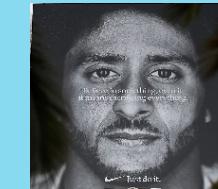
MY PRODUCT
EXPERIENCE



MY CUSTOMER
EXPERIENCE



YOUR IMPACT
ON SOCIETY



2019 Edelman Trust Barometer Special Report

In Brands We Trust?

8 Markets

Brazil, China, France,
Germany, India, Japan, the
U.K. and the U.S.

All data is nationally representative
based on age, region and gender

Margin of error

8-market average online survey total pop. data +/- 0.8% (n=16,000)
8-market average online survey brand trust scenarios data +/- 1.5%
(smallest n=4,595 for "lost trust" scenario)

Market-specific online survey total pop. data +/- 2.2% (n=2,000)
Market-specific online survey brand trust scenarios data +/- 4.2%
(smallest n=533 for "lost trust" scenario)

8-market average mobile survey data +/- 1.1% (n=8,000)
Market-specific mobile survey data +/- 3.1% (n=1,000)

3-market average influencer survey data +/- 2.5% (n=1,500)
Market-specific mobile survey data +/- 4.4% (n=500)



Online Survey

- How important is brand trust in the consumer buying process?
- How do consumers decide which brands to trust?

16,000 respondents (2,000 per market)

Fieldwork: April 15 – May 9, 2019



Mobile Survey

- How much do consumers trust specific brand communications?

8,000 respondents (1,000 per market)

Fieldwork: April 11 – April 26, 2019



Online Influencer Survey

- How are consumers interacting with influencers?

1,500 respondents (500 per market)

Age 18-34 in China, U.K., U.S.

Fieldwork: April 30 – May 8, 2019

MANY REASONS CONSUMERS NEED TO TRUST BRANDS MORE

Reasons why trusting the brands they buy is becoming more important

GROWING CONCERNS ABOUT PRODUCT EXPERIENCE

62%

Net of product-oriented concerns:

- Pace of innovation
- Increasing reliance on brands to automate my life
- Can't afford a bad purchase

GROWING CONCERNS ABOUT CUSTOMER EXPERIENCE

55%

Net of customer-oriented concerns:

- Personal data
- Brands can track and target me
- Use of AI for customer service

GROWING CONCERNS ABOUT BRANDS' IMPACT ON SOCIETY

69%

Net of societal-oriented concerns:

- Fake news and misinformation
- Brands more involved in societal issues
- I want brands to express my values

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q101. You indicated that being able to trust the brands that you buy or use is important. We are interested in knowing whether certain things happening in the world today are making it even more important to be able to trust the brands you buy or use. Among the items listed below, please select those, if any, are making it more important to be able to trust brands these days. Pick all that apply. Question asked of those who say it is important to be able to trust the brands they use (Q100/2-5). 8-market average. "Product experience" is a net of codes 2, 5, and 6; "Customer experience" is a net of codes 3, 4, and 10; "Impact on society" is a net of codes 1, 7, 8, and 9.

BRANDS ARE MAKING BIGGER PROMISES

MAKING A PROMISE

Product experience



UBER

Customer experience



AIRBNB

Societal impact



NIKE

Can consumers trust brands
to do what is right?

A black and white photograph of a woman with dark hair, wearing a light-colored sweater over a collared shirt. She is holding a dark coffee mug with both hands, looking down at it. The background is blurred, showing what appears to be a kitchen or dining area.

They're Buying
on Trust

BRAND TRUST RANKS AS A TOP BUYING CONSIDERATION

Percent who say each is a **deal breaker** or **deciding factor** in their brand buying decision

Product attributes	Quality	85
	Convenience	84
	Value	84
	Ingredients	82
	I must be able to trust the brand to do what is right	81
Brand and company attributes	Supply chain	79
	Customer before profits	78
	Good reviews	77
	Reputation	73
	Values	72
	Environmental impact	71

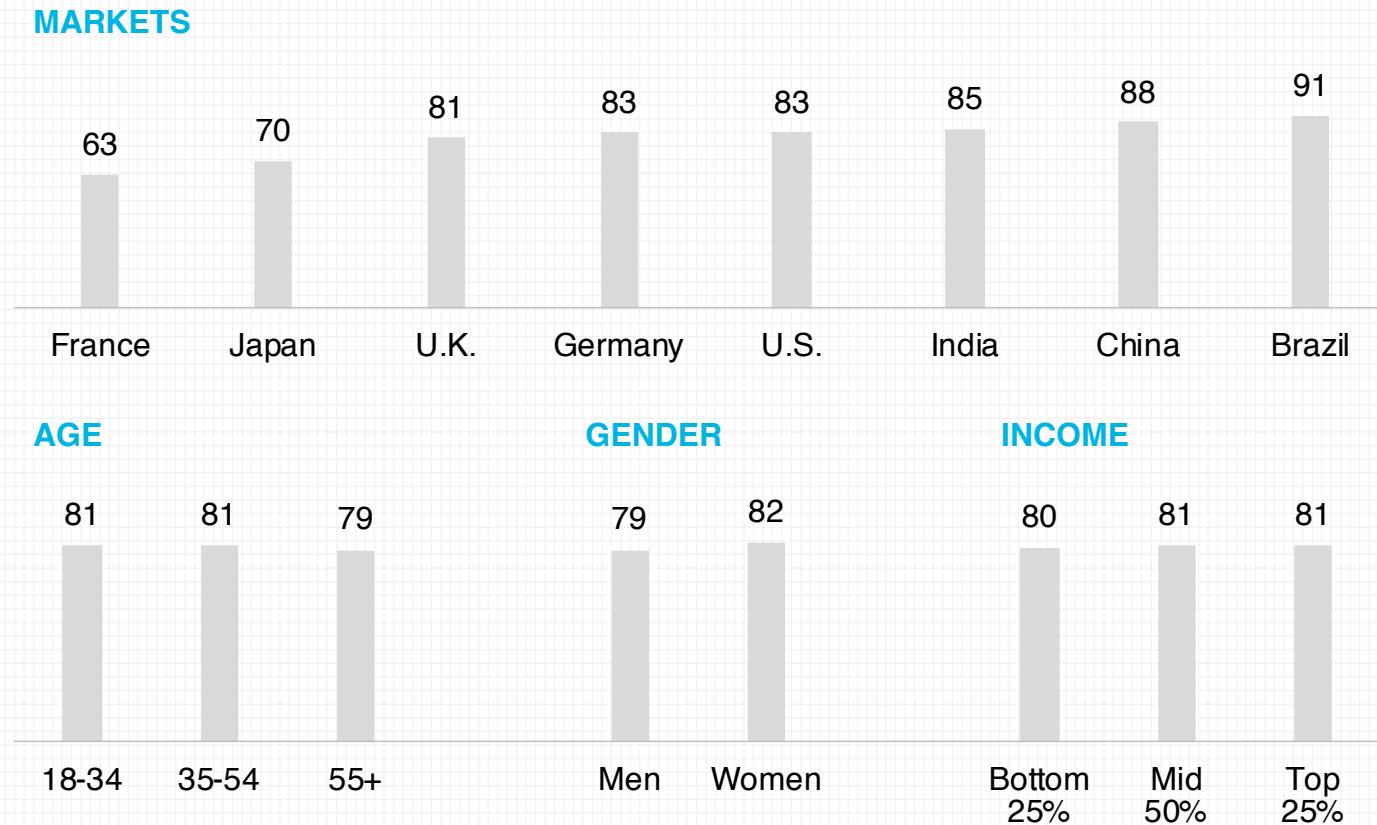
2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average.

BRAND TRUST ESSENTIAL ACROSS MARKETS, AGES AND INCOMES

Percent who say this is a **deal breaker** or deciding factor in their brand buying decision

I must be able to trust the
brand to do what is right

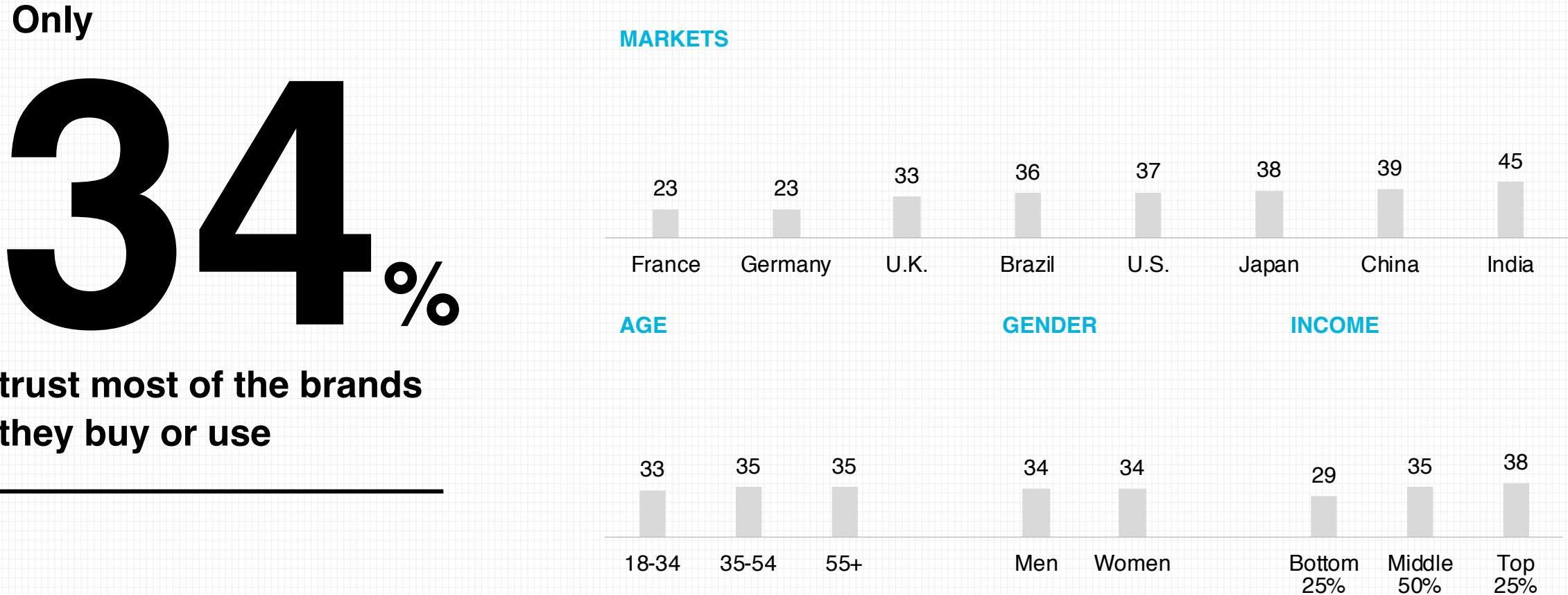
81 %



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average, by gender, age, and income.

ONLY 1 IN 3 CAN TRUST MOST OF THE BRANDS THEY BUY

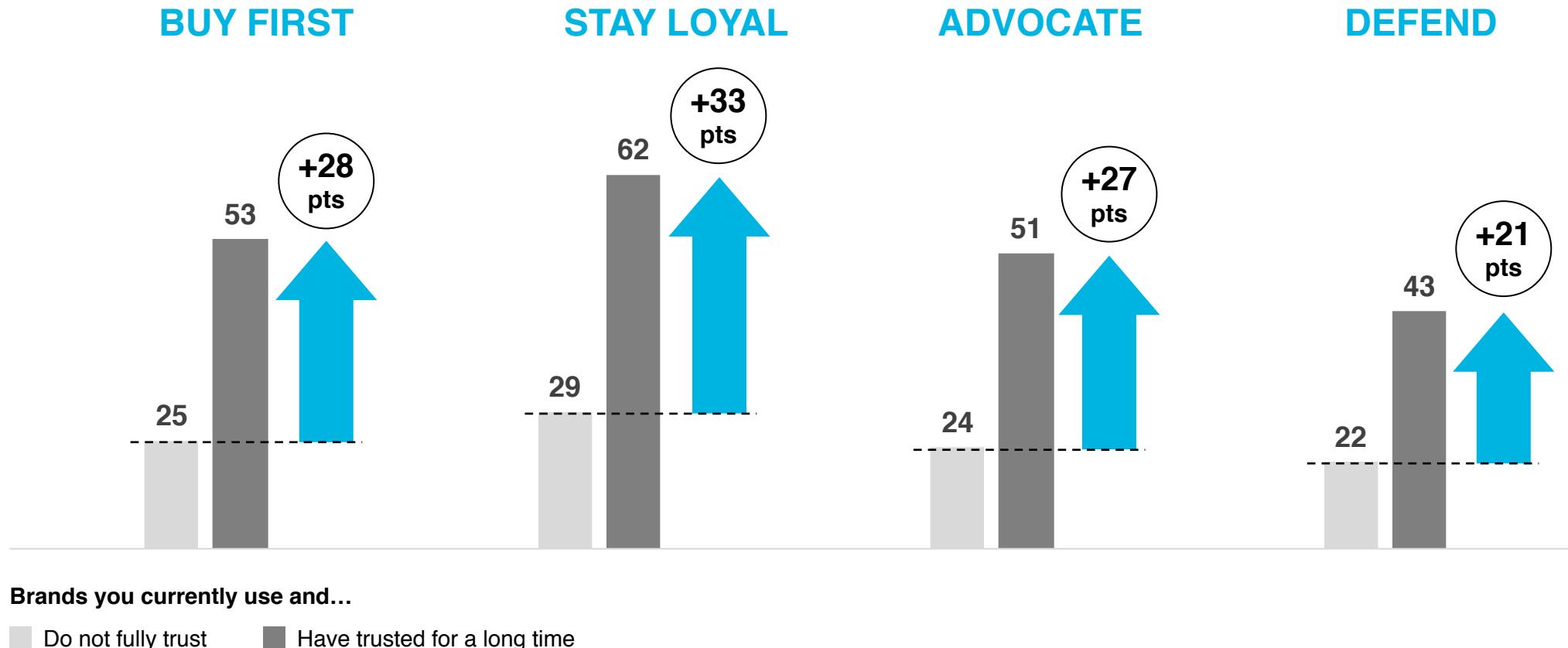
Percent who trust most of the brands they buy or use



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q99. Based on how you defined a brand you can trust in the previous question, approximately what proportion of the brands that you regularly buy or use would you say that you trust? Data is showing those who selected codes 5-7, about three quarters or more. 8-market average, by gender, age, and income.

WHEN BRANDS BUILD TRUST, CONSUMERS REWARD THEM

Percent who will engage in each behavior on behalf of a brand



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. Q14A. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 1: Think about a brand you currently use but do not fully trust. 8-market average. "Stay loyal" is an average of codes 6, 11, 12, 13, 15, 19, 20, 21, and 22; "Buy first" is an average of codes 9 and 10; "Advocate" is an average of codes 3, 4, 7, and 8; "Defend" is an average of codes 5 and 18.

The Opportunity: Make a Difference



CONSUMERS NOT CONVINCED OF BRANDS' COMMITMENT TO SOCIETY

Every brand has a responsibility to get involved in **at least one social issue** that does not directly impact its business

53 %

I know from personal experience that the brands I use keep the best interests of society in mind

**Only
21 %**

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q107Overall. Next, we are interested in examining the kinds of things you know about the brands you use. Still thinking about the same brand, for each of the items listed below, please indicate whether you believe it is true of that brand and, if so, on what basis you believe that it is true. 5-point scale; code 4, I know this is true based on my own experiences. Q17. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. 8-market average.

ALL TALK NO ACTION SEEN AS TRUSTWASHING

Too many brands use
societal issues as a marketing ploy
to sell more of their product

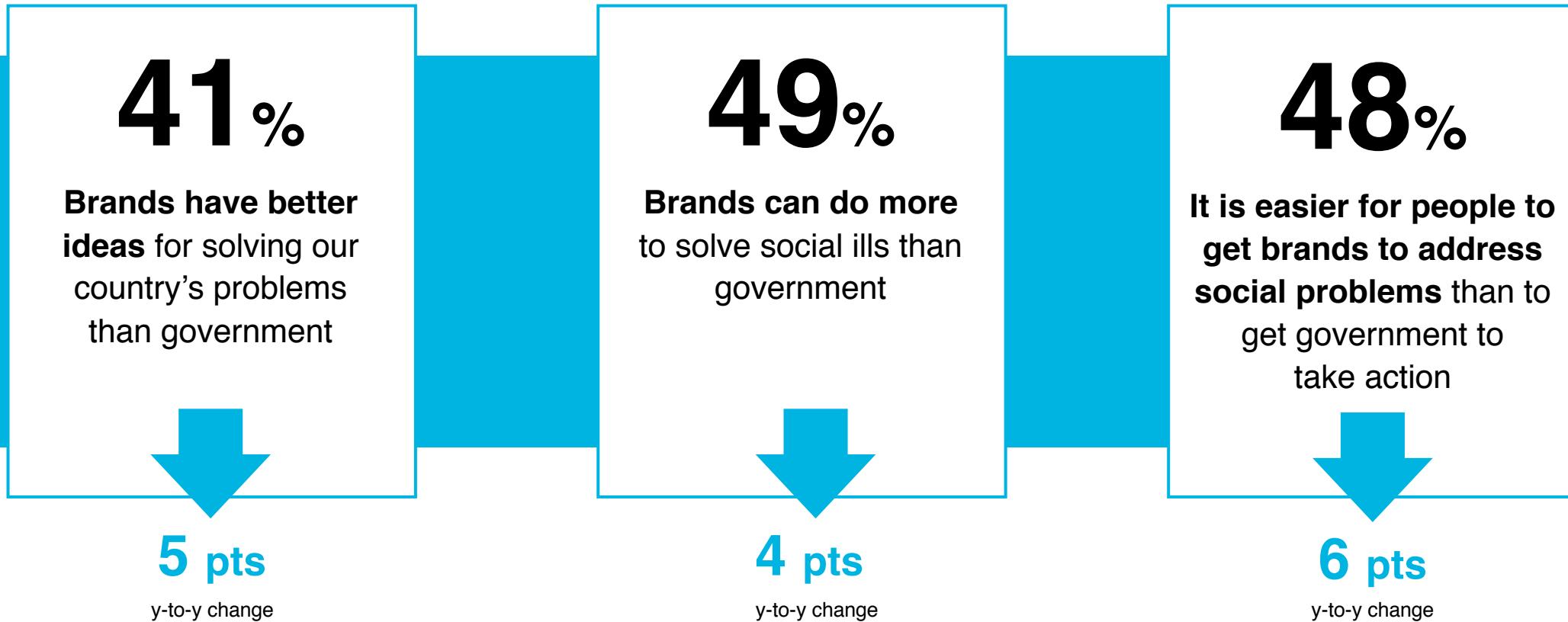
56%



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q17. Please indicate how much you agree or disagree with the following statements.

9-point scale; top 4 box, agree. 8-market average.

PEOPLE DISAPPOINTED IN BRANDS' LACK OF SOCIETAL IMPACT



CONSUMERS NOT SURE THEY CAN TRUST BRANDS TO DO THE RIGHT THING FOR SOCIETY

Percent who say each is an important reason they trust a given brand

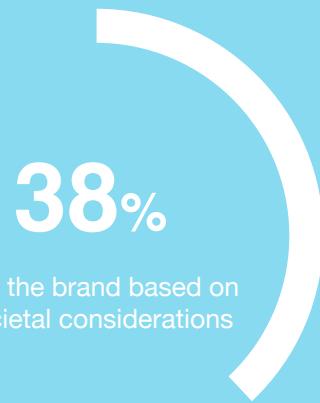
MY PRODUCT EXPERIENCE



MY CUSTOMER EXPERIENCE



YOUR IMPACT ON SOCIETY

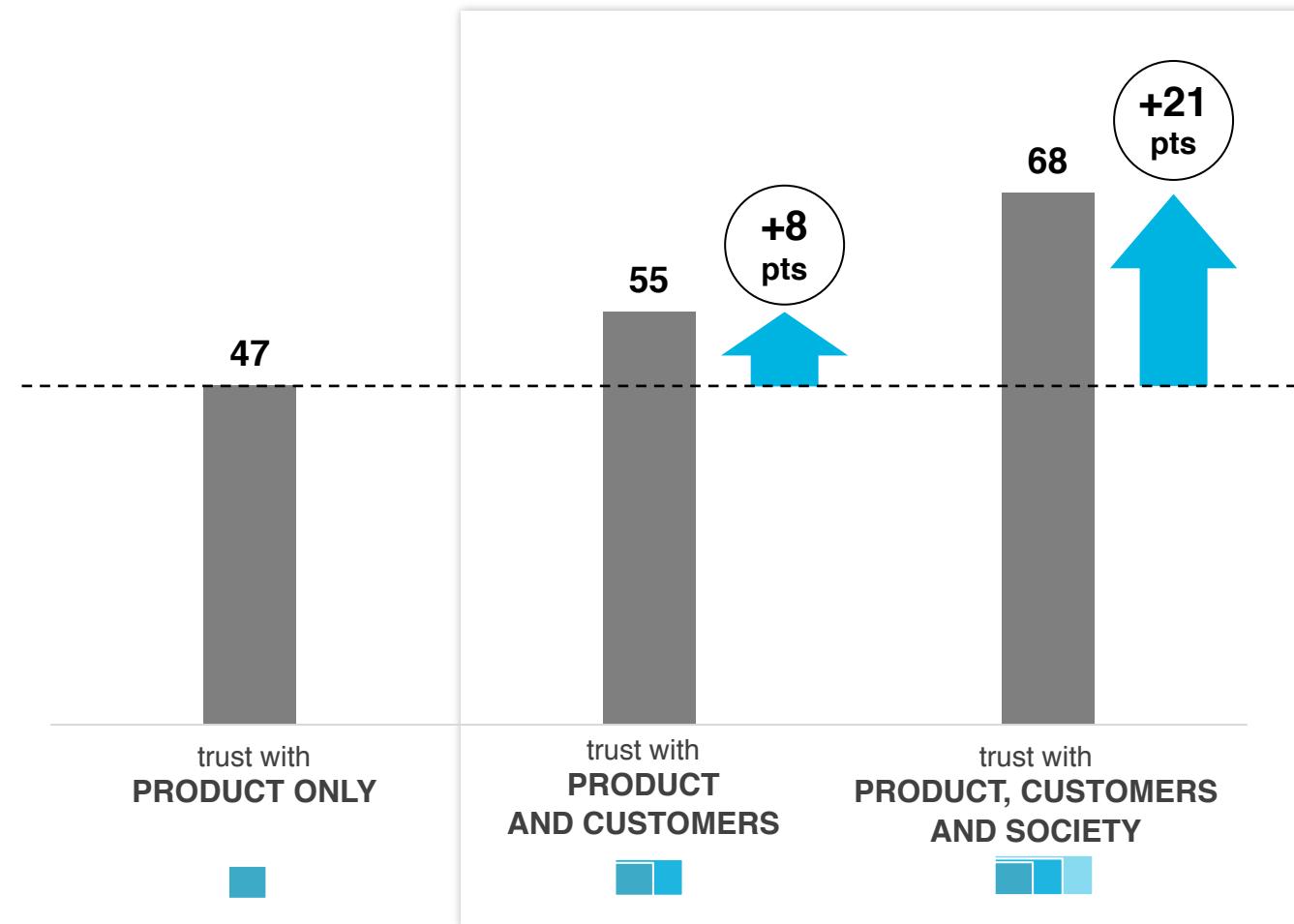


2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q126C. What are the most important reasons why you trust this brand? We are not interested in what you think or assume trustworthy brands do. We are interested in knowing what in particular it is about this brand that makes you trust it. Pick all that apply. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average. "My product experience" is a net of codes 1,12 and 22; "my customer experience" is a net of codes 2, 3 and 14; "your impact on society" is a net of codes 10, 11 and 15.

WHEN BRANDS EARN FULL TRUST, THE REWARDS MULTIPLY

Percent who

**BUY FIRST
STAY LOYAL
ADVOCATE
DEFEND**



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. Q126C. What are the most important reasons why you trust this brand? We are not interested in what you think or assume trustworthy brands do. We are interested in knowing what in particular it is about this brand that makes you trust it. Pick all that apply. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average. "Product" is a net of Q126C/1, 12 and 22; "Customers" is a net of Q126C/2, 3 and 14; "Society" is a net of Q126C/10, 11 and 15. Data showing as an average all attributes at Q14C.



How Brands Earn Trust

TRUSTED BRANDS ACT ON THEIR WORDS

MAKING A PROMISE

Dove Men+Care offering grants for paternity leave



Salesforce bars retail clients from using its technology to sell semi automatic weapons



Technology

Tech giant brings software to a gun fight

Business-software giant Salesforce instituted a new policy barring retail customers from using its technology to sell semiautomatic weapons and some other firearms.



Heineken® redesigns bars to discourage drunk driving



MAKING A PROMISE AND MAKING A DIFFERENCE

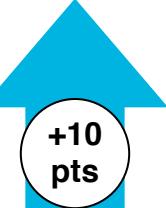
MAKING A DIFFERENCE

MOST CONSUMERS AVOID ADVERTISING

Percent who agree

3 in 4 now avoid advertising

74%



Use one or more
advertising avoidance strategies



Use ad blocking technology



Changed media habits to see less advertising



Have found ways to avoid almost all ads



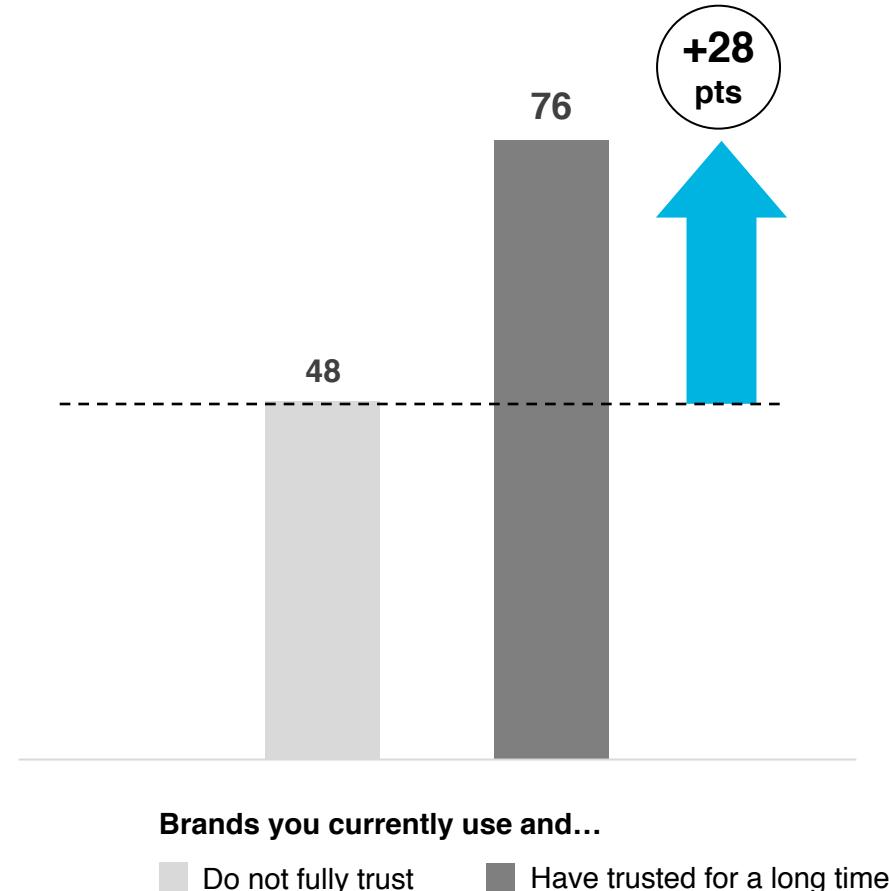
Pay for streaming services



IF THEY TRUST YOU, YOU WILL EARN THEIR ATTENTION

Percent who
PAY ATTENTION

to the brand's
advertising and other
communications



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q80A. In general, how much do you pay attention to advertising and other communications from [INSERT BRAND]? Please indicate your answer using a 9-point scale, where one means that "I pay no attention at all" and nine means that "I pay a great deal of attention" to the advertising and marketing I see and hear. 9-point scale; top 4 box, pay attention. Question asked of those who were assigned to scenario 1: Think about a brand you currently use but do not fully trust. Q80C. In general, how much do you pay attention to advertising and other communications from [INSERT BRAND]? Please indicate your answer using a 9-point scale, where one means that "I pay no attention at all" and nine means that "I pay a great deal of attention" to the advertising and marketing I see and hear. 9-point scale; top 4 box, pay attention. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average.

USE TRUSTED INFLUENCERS TO BREAK THROUGH

Percent of 18-to-34-year-olds who agree, 3-market average

INFLUENCERS MORE TRUSTED THAN BRANDS

I trust what influencers say about brands **much more than what brands say about themselves** in their advertising

63%

RELATABILITY BEATS POPULARITY

Relatability nearly

2 X as important

as **popularity**
as a quality that
attracts people to influencers

INFLUENCERS EARN SALES, TRUST AND ADVOCACY

Because of an influencer, I have taken this action in the last 6 months:

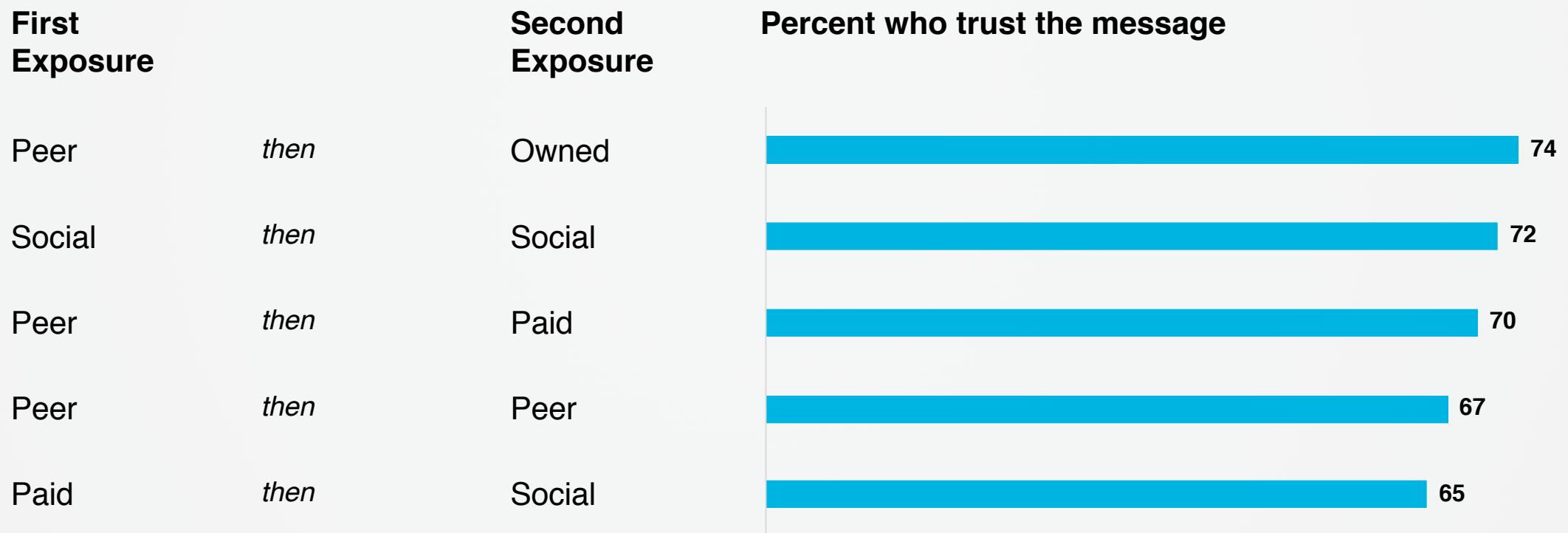


2019 Edelman Trust Barometer Special Report: In Brands We Trust? Online Influencer Survey. Q4. There are lots of people online who comment on many topics. What is it about the influencers you follow that attracted you to them and gets you to view their posts on a regular basis? Pick all that apply. Q9. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Q6. Which of the following have you done in the last 6 months because of the influencers you follow? Pick all that apply. 3-market average. "I bought a new product" is a net of Q6/1-4. "I trusted the brand" is a net of Q6/8,11.



LEAD WITH PEER AMPLIFY WITH OWNED, SOCIAL AND PAID

Five most effective channel sequences for earning trust in a message,
among those who are not customers of the brand



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Mobile Survey. 1st Exposure based on Q7. 2nd Exposure based on Q1. Analysis includes only those with two exposures to the message. Q19. How much do you trust the message delivered. Indicate your answer using a 9-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal". 9-point scale; top 4 box, trust. 8-market average, among those who are not current customers of the brand (Q7/1).



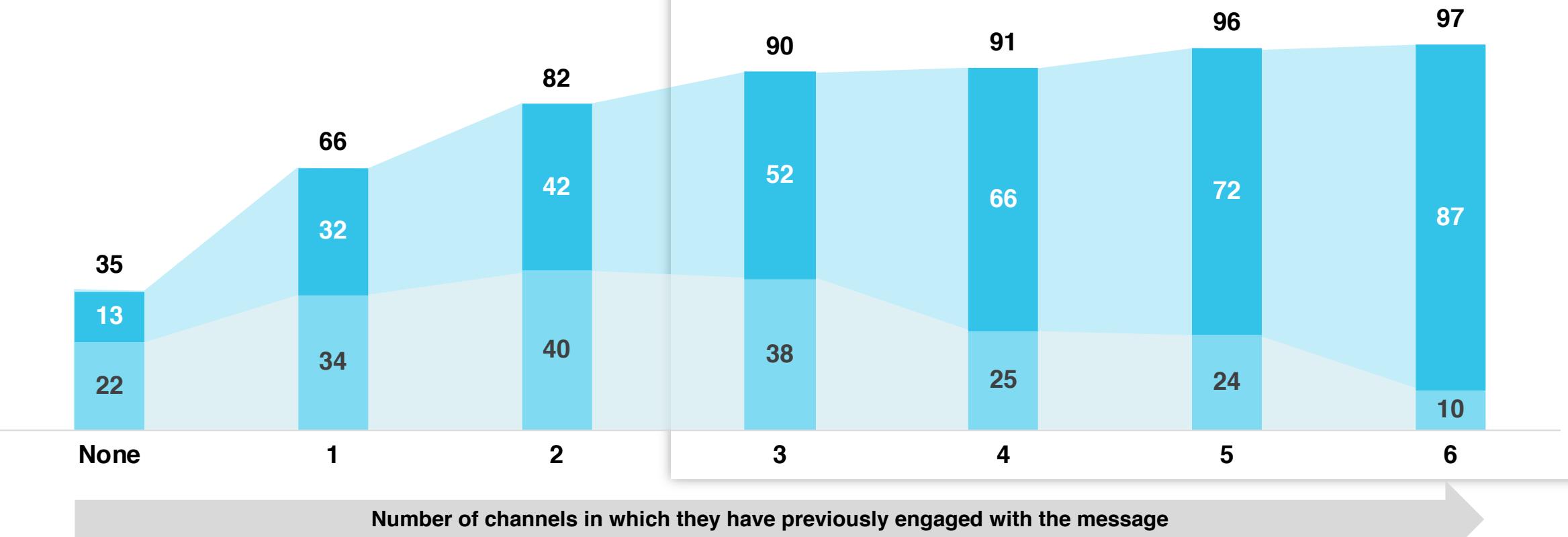
SURROUND SOUND BUILDS TRUST IN A BRAND'S MESSAGE

Percent who trust the message

Strong message trust (8-9)

Weak message trust (6-7)

Once they have seen your message repeated across three different channels, their trust in it strengthens



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Mobile Survey. Q19. How much do you trust the message delivered in the communication? Indicate your answer using a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; top 2 box, strong trust; codes 6-7, weak trust. 8-market average, by frequency of prior exposure (Q7).

TRUSTED BRANDS ACT ON THEIR WORDS

MAKING A PROMISE

Gillette™



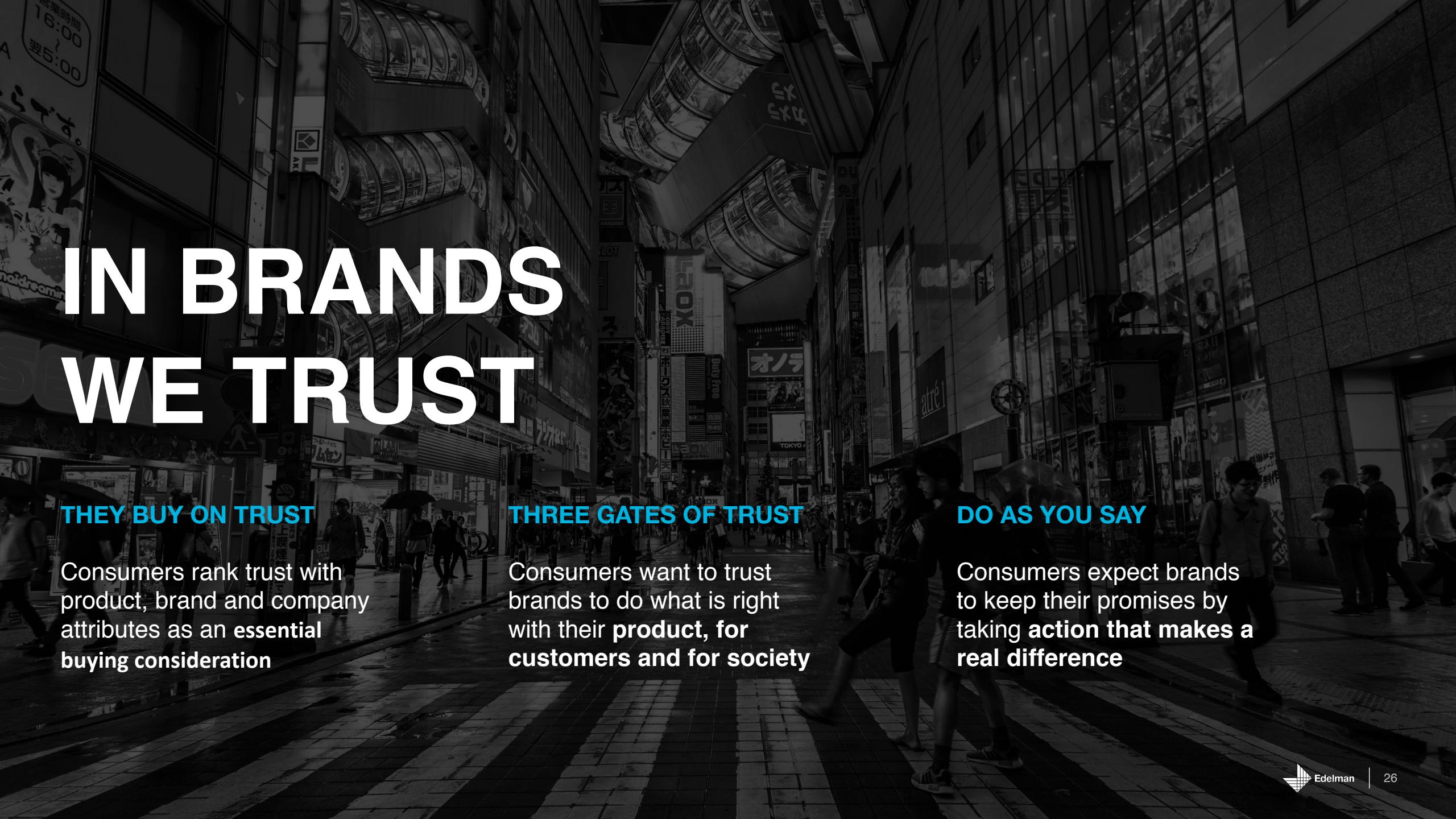
Dove
**MEN
+CARE**



MAKING AN IMPRESSION

MAKING A DIFFERENCE

IN BRANDS WE TRUST



THEY BUY ON TRUST

Consumers rank trust with product, brand and company attributes as an **essential buying consideration**

THREE GATES OF TRUST

Consumers want to trust brands to do what is right with their **product, for customers and for society**

DO AS YOU SAY

Consumers expect brands to keep their promises by taking **action that makes a real difference**

Supplemental Data



In Brands We Trust?

Supplemental Data

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Data tables



REASONS BRAND TRUST IS BECOMING MORE IMPORTANT

Percent who say each is reason why trusting a brand they buy is becoming more important

	BY MARKETS								
	8-market avg	Brazil	China	France	Germany	India	Japan	U.K.	U.S.
PRODUCT-ORIENTED CONCERNS	62	69	72	60	61	74	46	54	57
The pace of innovation with new products and services being introduced all of the time	36	46	53	29	33	47	27	26	27
I am struggling financially and cannot afford to waste any money on a bad purchase	28	27	17	35	33	28	22	29	33
My increasing reliance on brands to automate things that I used to do myself	20	25	28	12	17	37	9	16	16
CUSTOMER-ORIENTED CONCERNS	55	55	61	50	58	67	33	59	59
The ever-increasing number of brands that have my personal information in their databases	35	32	32	33	37	36	20	46	43
The increasing sophistication with which brands can target or track me	29	28	31	23	30	39	17	32	33
The increasing reliance of brands on automation and artificial intelligence for customer service	24	24	31	21	22	34	13	25	26
SOCIETAL-ORIENTED CONCERNS	69	75	81	64	63	77	63	62	67
The spread of fake news and false information on the internet	36	33	31	37	36	41	25	41	42
The increasing number of brands getting involved in social issues and societal problems	34	44	49	26	26	39	30	25	30
My increasing desire to express my values through the brands I buy or don't buy	28	33	38	26	21	37	29	18	25
My increasing tendency to express my political views through the brands I buy or don't buy	17	26	22	13	13	21	10	12	17

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q101. You indicated that being able to trust the brands that you buy or use is important. We are interested in knowing whether certain things happening in the world today are making it even more important to be able to trust the brands you buy or use. Among the items listed below, please select those, if any, are making it more important to be able to trust brands these days. Pick all that apply. Question asked of those who say it is important to be able to trust the brands they use (Q100/2-5). 8-market average. "Product experience" is a net of codes 2, 5, and 6; "Customer experience" is a net of codes 3, 4, and 10; "Impact on society" is a net of codes 1, 7, 8, and 9.

REASONS BRAND TRUST IS BECOMING MORE IMPORTANT

Percent who say each is reason why trusting a brand they buy is becoming more important

	BY DEMOGRAPHICS								
	Age			Gender		Income			
	8-market avg	18-34	35-54	55+	Male	Female	Bottom 25%	Mid 50%	Top 25%
PRODUCT-ORIENTED CONCERNS	62	68	61	56	61	62	68	62	58
The pace of innovation with new products and services being introduced all of the time	36	39	36	33	38	34	31	37	39
I am struggling financially and cannot afford to waste any money on a bad purchase	28	32	27	25	24	31	43	28	17
My increasing reliance on brands to automate things that I used to do myself	20	23	21	16	21	19	17	20	23
CUSTOMER-ORIENTED CONCERNS	55	57	56	53	57	54	48	55	62
The ever-increasing number of brands that have my personal information in their databases	35	34	36	35	36	34	29	35	41
The increasing sophistication with which brands can target or track me	29	30	28	29	30	28	23	29	34
The increasing reliance of brands on automation and artificial intelligence for customer service	24	24	25	24	26	23	21	25	28
SOCIAL-ORIENTED CONCERNS	69	74	68	64	69	69	66	70	71
The spread of fake news and false information on the internet	36	37	35	35	37	35	32	36	39
The increasing number of brands getting involved in social issues and societal problems	34	37	33	30	33	35	31	35	35
My increasing desire to express my values through the brands I buy or don't buy	28	32	29	24	28	29	26	29	31
My increasing tendency to express my political views through the brands I buy or don't buy	17	21	17	13	17	17	16	17	18

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q101. You indicated that being able to trust the brands that you buy or use is important. We are interested in knowing whether certain things happening in the world today are making it even more important to be able to trust the brands you buy or use. Among the items listed below, please select those, if any, are making it more important to be able to trust brands these days. Pick all that apply. Question asked of those who say it is important to be able to trust the brands they use (Q100/2-5). 8-market average, by age, gender, and income. "Product experience" is a net of codes 2, 5, and 6; "Customer experience" is a net of codes 3, 4, and 10; "Impact on society" is a net of codes 1, 7, 8, and 9.

BUYING CONSIDERATIONS

Percent who say each attribute is a **deal breaker** or **deciding factor** in their buying decision (page 1 of 2)

	ACROSS BRAND CATEGORIES								
	8-market avg	Bank / credit card	Fashion / apparel	Food / beverage	Medications	Personal care / beauty	QSR / fast food	Retail	Technology
It consistently offers the best quality within the category	85	85	83	86	85	84	83	85	85
The brand is very convenient and very easy to use	84	85	83	83	84	84	83	84	85
It consistently offers the best value for the money within the category	84	86	84	86	82	85	83	85	84
It uses only high-quality ingredients, components or customer service tools	82	80	81	82	83	81	83	82	82
I must be able to trust the brand to do what is right	81	83	78	80	82	79	79	82	80
It behaves responsibly and fairly when buying the materials, products, or services it uses	79	79	79	80	79	79	79	79	78
It puts customer interests ahead of its own profits	78	82	76	80	77	77	76	77	77
It gets good customer reviews	77	79	77	76	77	78	76	77	79
The brand has a good reputation among people I know	73	75	71	72	75	73	74	73	75
The brand's values match mine	72	75	72	73	69	73	70	72	71
It is working to reduce its environmental impact	71	69	70	73	69	73	72	72	69

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average, by sector.

BUYING CONSIDERATIONS

Percent who say each attribute is a **deal breaker** or **deciding factor** in their buying decision (page 2 of 2)

	ACROSS BRAND CATEGORIES								
	8-market avg	Bank / credit card	Fashion / apparel	Food / beverage	Medications	Personal care / beauty	QSR / fast food	Retail	Technology
The brand is innovative, always introducing new products, features and services	69	71	69	67	68	68	69	69	74
It has features and options that no-one else has	68	69	66	68	67	69	67	68	69
The brand stands out from its competitors. It is unique in look and design.	63	61	67	62	57	62	64	64	66
The brand actively supports or speaks out on an issue that is important to me	62	63	60	64	60	62	61	62	60
It gives their employees good benefits and good pay	62	63	61	64	60	62	64	63	62
It is a good communicator and has a strong, responsive social media presence	60	62	59	58	58	58	60	60	61
It has a heritage that I can relate to	60	62	60	61	60	60	58	60	60
The brand is from this country	56	60	54	57	57	55	52	58	54
Owning or using this brand says something positive about me	56	56	60	55	53	58	56	57	56
The brand has an image that is trendy, exclusive or cool	51	49	54	50	47	52	53	50	53

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average, by sector.

BUYING CONSIDERATIONS

Percent who say each attribute is a **deal breaker** or **deciding factor** in their buying decision (page 1 of 2)

	BY MARKETS								
	8-market avg	Brazil	China	France	Germany	India	Japan	U.K.	U.S.
It consistently offers the best quality within the category	85	92	93	68	87	87	75	86	89
The brand is very convenient and very easy to use	84	90	89	69	87	85	79	85	87
It consistently offers the best value for the money within the category	84	92	91	72	86	87	72	86	89
It uses only high-quality ingredients, components or customer service tools	82	91	85	68	86	86	68	83	86
I must be able to trust the brand to do what is right	81	91	88	63	83	85	70	81	83
It behaves responsibly and fairly when buying the materials, products, or services it uses	79	88	91	61	82	85	73	76	76
It puts customer interests ahead of its own profits	78	85	86	64	77	84	67	76	80
It gets good customer reviews	77	91	91	56	76	84	60	79	81
The brand has a good reputation among people I know	73	88	89	56	66	81	59	73	75
The brand's values match mine	72	81	82	56	75	79	71	64	64
It is working to reduce its environmental impact	71	83	83	58	78	80	52	70	64

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average.

BUYING CONSIDERATIONS

Percent who say each attribute is a **deal breaker** or **deciding factor** in their buying decision (page 2 of 2)

	BY MARKETS								
	8-market avg	Brazil	China	France	Germany	India	Japan	U.K.	U.S.
The brand is innovative, always introducing new products, features and services	69	84	87	50	67	83	57	60	66
It has features and options that no-one else has	68	85	83	47	68	79	63	55	63
The brand stands out from its competitors. It is unique in look and design.	63	73	83	45	53	79	57	54	61
The brand actively supports or speaks out on an issue that is important to me	62	76	75	46	68	75	51	51	51
It gives their employees good benefits and good pay	62	73	64	48	72	69	40	66	65
It is a good communicator and has a strong, responsive social media presence	60	74	82	42	47	74	52	51	55
It has a heritage that I can relate to	60	80	75	45	63	70	55	48	46
The brand is from this country	56	52	61	49	56	65	58	48	58
Owning or using this brand says something positive about me	56	61	84	46	44	75	49	42	48
The brand has an image that is trendy, exclusive or cool	51	68	67	41	44	76	39	34	39

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average.

BUYING CONSIDERATIONS

Percent who say each attribute is a **deal breaker** or **deciding factor** in their buying decision (page 1 of 2)

	BY DEMOGRAPHICS								
	Age			Gender		Income			
	8-market avg	18-34	35-54	55+	Male	Female	Bottom 25%	Mid 50%	Top 25%
It consistently offers the best quality within the category	85	84	85	85	84	86	83	85	87
The brand is very convenient and very easy to use	84	84	84	84	83	85	83	84	85
It consistently offers the best value for the money within the category	84	84	84	84	83	85	84	84	85
It uses only high-quality ingredients, components or customer service tools	82	80	82	82	81	82	79	81	85
I must be able to trust the brand to do what is right	81	81	81	79	79	82	80	81	81
It behaves responsibly and fairly when buying the materials, products, or services it uses	79	80	80	78	77	80	79	79	79
It puts customer interests ahead of its own profits	78	78	79	76	77	78	78	78	77
It gets good customer reviews	77	82	79	71	75	79	77	77	79
The brand has a good reputation among people I know	73	77	74	69	72	75	72	74	75
The brand's values match mine	72	73	73	70	70	73	70	72	73
It is working to reduce its environmental impact	71	73	71	69	69	73	72	71	71

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average, by age, gender, and income.

BUYING CONSIDERATIONS

Percent who say each attribute is a **deal breaker** or **deciding factor** in their buying decision (page 2 of 2)

	BY DEMOGRAPHICS								
	Age			Gender		Income			
	8-market avg	18-34	35-54	55+	Male	Female	Bottom 25%	Mid 50%	Top 25%
The brand is innovative, always introducing new products, features and services	69	72	71	64	70	69	68	69	72
It has features and options that no-one else has	68	71	69	64	68	67	67	68	69
The brand stands out from its competitors. It is unique in look and design.	63	66	64	58	65	61	61	63	66
The brand actively supports or speaks out on an issue that is important to me	62	65	63	57	61	62	63	62	61
It gives their employees good benefits and good pay	62	64	63	59	60	64	62	63	62
It is a good communicator and has a strong, responsive social media presence	60	65	60	53	60	59	59	60	60
It has a heritage that I can relate to	60	58	62	60	61	59	59	60	61
The brand is from this country	56	52	56	59	55	57	56	57	54
Owning or using this brand says something positive about me	56	62	59	46	57	55	56	57	58
The brand has an image that is trendy, exclusive or cool	51	57	52	43	52	50	51	51	52

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior involving this type of product and not what you would do in a perfect world. 3-point scale; top 2 box, important. 8-market average, by age, gender, and income.

REASONS WHY CONSUMERS TRUST BRANDS

Percent who say each is an important reason they trust a given brand

	BY MARKETS								
	8-market avg	Brazil	China	France	Germany	India	Japan	U.K.	U.S.
PRODUCT-ORIENTED REASONS THEY TRUST	87	91	83	88	90	85	83	88	88
It delivers good quality products or services	73	80	65	72	74	68	71	74	73
The brand gets good ratings and reviews	57	67	58	60	62	64	23	61	63
It charges a fair price for its products or services	49	51	43	47	52	52	44	53	51
CUSTOMER-ORIENTED REASONS THEY TRUST	56	58	59	53	54	69	38	65	57
It has always treated me and others well	39	40	28	39	44	47	16	51	46
It quickly addresses customer service problems	36	38	39	33	25	46	28	43	35
They have done a good job protecting the privacy and security of my personal information	23	28	30	20	18	30	13	26	23
SOCIETAL-ORIENTED REASONS THEY TRUST	38	45	45	36	37	51	18	41	34
They treat their employees well	22	23	25	18	22	30	11	29	22
It gets involved in causes and issues that I feel they have an obligation to address	19	28	25	19	14	28	7	18	18
It does not support social or political policies that I object to	15	18	14	17	17	22	5	18	14

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q126C. What are the most important reasons why you trust this brand? We are not interested in what you think or assume trustworthy brands do. We are interested in knowing what in particular it is about this brand that makes you trust it. Pick all that apply. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average. "Product-oriented reasons they trust" is a net of codes 1,12 and 22; "Customer-oriented reasons they trust" is a net of codes 2, 3 and 14; "societal-oriented reasons they trust" is a net of codes 10, 11 and 15.

REASONS WHY CONSUMERS TRUST BRANDS

Percent who say each is an important reason they trust a given brand

	BY DEMOGRAPHICS								
	Age			Gender		Income			
	8-market avg	18-34	35-54	55+	Male	Female	Bottom 25%	Mid 50%	Top 25%
PRODUCT-ORIENTED REASONS THEY TRUST	87	85	88	88	86	88	86	88	87
It delivers good quality products or services	73	67	72	77	71	74	71	73	74
The brand gets good ratings and reviews	57	62	55	54	57	56	55	57	58
It charges a fair price for its products or services	49	47	45	55	48	50	48	50	50
CUSTOMER-ORIENTED REASONS THEY TRUST	56	62	54	53	59	54	54	55	61
It has always treated me and others well	39	43	36	38	41	37	36	38	43
It quickly addresses customer service problems	36	37	35	35	39	33	33	35	40
They have done a good job protecting the privacy and security of my personal information	23	27	22	21	25	22	23	23	25
SOCIETAL-ORIENTED REASONS THEY TRUST	38	46	36	33	41	35	37	38	40
They treat their employees well	22	27	20	20	25	20	20	22	26
It gets involved in causes and issues that I feel they have an obligation to address	19	25	19	14	20	19	18	19	20
It does not support social or political policies that I object to	15	18	14	14	17	14	15	15	17

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q126C. What are the most important reasons why you trust this brand? We are not interested in what you think or assume trustworthy brands do. We are interested in knowing what in particular it is about this brand that makes you trust it. Pick all that apply. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average, by age, gender, and income. "Product-oriented reasons they trust" is a net of codes 1,12 and 22; "Customer-oriented reasons they trust" is a net of codes 2, 3 and 14; "societal-oriented reasons they trust" is a net of codes 10, 11 and 15.

CONSUMER REWARDS FOR BRANDS THEY TRUST

Percent who will engage in each behavior on behalf of a brand they trust (page 1 of 2)

	BY MARKETS								
	8-market avg	Brazil	China	France	Germany	India	Japan	U.K.	U.S.
BUY FIRST	53	58	68	52	47	68	32	51	53
I am one of the first to try the new products/services of this brand when they come out	46	55	66	44	34	67	27	39	42
I am happy to pay more for this brand's products/ services	59	60	70	60	60	69	36	62	63
STAY LOYAL	62	63	71	61	62	70	48	63	65
I am happy to share my personal data with this brand	49	54	64	40	45	65	27	55	50
When I buy in this category, it is almost always this brand	66	75	77	65	60	72	52	63	67
When I buy/use products/services in this category, it has to be this brand	63	66	69	60	61	75	48	61	65
I will continue to buy this product even if a competitive brand is getting better reviews	69	68	76	70	73	72	54	71	74
I will continue to buy this brand even if another brand suddenly becomes hot and trendy	75	66	80	75	81	75	60	79	82
I will continue to buy this brand even if a competing brand is more innovative	66	67	77	64	63	68	51	68	69
I will continue to buy/use this brand even if something goes wrong with its products/services	58	56	67	53	57	65	46	61	60
I will continue to buy this brand even if I strongly disagree with its stand on a controversial issue	48	45	57	47	41	65	36	47	50
I will continue to buy this brand even if people I know are pressuring me to boycott it	68	73	72	73	74	71	55	64	67

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average. "Stay loyal" is an average of codes 6, 11, 12, 13, 15, 19, 20, 21, and 22; "Buy first" is an average of codes 9 and 10.

CONSUMER REWARDS FOR BRANDS THEY TRUST

Percent who will engage in each behavior on behalf of a brand they trust (page 2 of 2)

	8-market avg	BY MARKETS							
		Brazil	China	France	Germany	India	Japan	U.K.	U.S.
ADVOCATE	51	60	71	44	44	66	40	43	45
I advocate for this brand even when I am not directly asked for advice	57	67	78	49	50	64	60	46	45
I always recommend this brand if someone asks	76	85	85	76	77	80	57	75	78
I like/rate what the brand is saying in social media	42	57	72	29	30	64	28	32	35
I participate in the creation of the brand's media content	27	29	48	23	17	55	14	20	20
DEFEND	43	51	60	42	33	61	29	36	36
I defend this brand if I ever hear someone criticizing it	55	64	64	58	44	69	40	52	51
I write rebuttals when I see negative comments about this brand on social media	30	38	55	26	21	53	18	19	20

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average. "Advocate" is an average of codes 3, 4, 7, and 8; "Defend" is an average of codes 5 and 18.

CONSUMER REWARDS FOR BRANDS THEY TRUST

Percent who will engage in each behavior on behalf of a brand they trust (page 1 of 2)

	8-market avg	BY DEMOGRAPHICS							
		Age		Gender		Income			
		18-34	35-54	55+	Male	Female	Bottom 25%	Mid 50%	Top 25%
BUY FIRST	53	60	56	44	53	52	46	53	60
I am one of the first to try the new products/services of this brand when they come out	46	55	50	34	46	45	39	46	53
I am happy to pay more for this brand's products/ services	59	64	62	53	60	59	52	60	66
STAY LOYAL	62	65	65	57	63	62	59	63	65
I am happy to share my personal data with this brand	49	56	52	40	52	47	45	50	54
When I buy in this category, it is almost always this brand	66	72	68	58	63	68	63	67	69
When I buy/use products/services in this category, it has to be this brand	63	64	66	58	63	62	59	64	66
I will continue to buy this product even if a competitive brand is getting better reviews	69	71	73	65	69	70	66	70	73
I will continue to buy this brand even if another brand suddenly becomes hot and trendy	75	75	78	70	74	75	72	75	78
I will continue to buy this brand even if a competing brand is more innovative	66	67	69	60	65	66	62	67	68
I will continue to buy/use this brand even if something goes wrong with its products/services	58	62	59	52	60	56	52	59	62
I will continue to buy this brand even if I strongly disagree with its stand on a controversial issue	48	52	50	43	50	46	46	49	49
I will continue to buy this brand even if people I know are pressuring me to boycott it	68	68	71	67	70	67	68	69	69

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average, by age, gender, and income. "Stay loyal" is an average of codes 6, 11, 12, 13, 15, 19, 20, 21, and 22; "Buy first" is an average of codes 9 and 10.

CONSUMER REWARDS FOR BRANDS THEY TRUST

Percent who will engage in each behavior on behalf of a brand they trust (page 2 of 2)

	8-market avg	BY DEMOGRAPHICS							
		Age		Gender		Income			
		18-34	35-54	55+	Male	Female	Bottom 25%	Mid 50%	Top 25%
ADVOCATE	51	58	54	41	51	50	47	52	54
I advocate for this brand even when I am not directly asked for advice	57	61	60	50	57	56	54	58	60
I always recommend this brand if someone asks	76	78	78	72	75	77	72	77	79
I like/rate what the brand is saying in social media	42	54	46	28	43	41	38	44	45
I participate in the creation of the brand's media content	27	39	30	14	29	25	24	28	30
DEFEND	43	50	46	33	44	41	39	44	45
I defend this brand if I ever hear someone criticizing it	55	59	58	48	54	55	51	56	58
I write rebuttals when I see people post negative comments about this brand on social media	30	41	33	17	33	27	26	31	32

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes me well. Question asked of those who were assigned to scenario 3: Think about a brand you have trusted for a long time. 8-market average, by age, gender, and income. "Advocate" is an average of codes 3, 4, 7, and 8; "Defend" is an average of codes 5 and 18.

Technical Appendix



2019 EDELMAN TRUST BAROMETER SPECIAL REPORT: IN BRANDS WE TRUST THE SAMPLE

COUNTRY	INTERNET PENETRATION*	SAMPLE SIZE	LANGUAGES	QUOTA PARAMETERS
BRAZIL	71%	2,000	Portuguese	Gender, age & region
CHINA	58%	2,000	Simplified Chinese (Mandarin)	Gender, age & region
FRANCE	93%	2,000	French	Gender, age & region
GERMANY	96%	2,000	German	Gender, age & region
INDIA	41%	2,000	English	Gender, age & region
JAPAN	94%	2,000	Japanese	Gender, age & region
U.K.	95%	2,000	English	Gender, age, region & ethnicity
U.S.	89%	2,000	English	Gender, age, region & ethnicity

*Data source: <http://www.internetworldstats.com/stats.htm> (March 31, 2019 for Asian and European markets; December 31, 2017 for Latin American markets; April 30, 2019 for North American markets.)

HOW WE MEASURED

THE INFLUENCE OF PRIOR EXPOSURE ON MESSAGE TRUST (SURROUND SOUND)

Respondents could have had prior exposure to the brand message in up to six different ways.

Top two (strong trust) and third and fourth box (weak trust) scores were calculated and graphed among seven groups of people, ranging from those with no prior exposure to the message up to those who had previously seen the message in all six different ways.

Respondents were asked:

Had you seen or heard this message
or this information about the brand
before seeing this communication?
(Please select all that apply.)

- Yes, as a customer I already knew this about the brand
 - Yes, I have seen their advertising before
 - Yes, my friends or family have mentioned it to me before
 - Yes, I have seen or heard stories about this reported in the media
 - Yes, I have seen it discussed on social media
 - Yes, I learned this about the brand when I was shopping for this type of product
 - No, never
-

HOW WE MEASURED THE CONSUMER REWARDS FOR BRANDS THAT EARN TRUST BEYOND PRODUCT

Respondents were asked what the most important reasons were for why they trust a brand with which they have an enduring trust relationship. These foundations of trust were categorized as being related to product considerations, customer experience considerations or societal considerations.

Respondents were grouped into three segments based on the foundation of their brand trust:

1. Product-based trust only
2. Product and customer-experience based trust
3. Product, customer experienced, and societal-issue related trust

For each group, an average across all of the buy first, stay loyal, advocate and defend KPI items was calculated and charted.

Respondents were asked:

Think about a brand you have trusted for a long time. What are the most important reasons why you trust this brand? We are not interested in what you think or assume trustworthy brands do. We are interested in knowing what in particular it is about this brand that makes you trust it.
(Please select all that apply.)

Product

It delivers good quality products or services
It charges a fair price for its products or services
The brand gets good ratings and reviews

Customer Experience

It has always treated me and others well
It quickly addresses customer service problems
They have done a good job protecting the privacy and security of my data and personal information

Societal Issues

It does not support social or political policies that I object to
It gets involved in causes and issues that I feel they have an obligation to address
They treat their employees well

HOW WE MEASURED

BRAND TRUST DYNAMICS: THREE SCENARIOS

In order to understand the underlying mechanisms and impact of brand trust, we assigned respondents to one of three scenarios:

1) **BUY WITHOUT TRUST:**

“Think about a brand you currently use but do not fully trust”. This scenario allowed us to understand purchase and brand relationships in the absence of trust, including why people buy or use brands that they do not trust.

2) **BUY WITH ENDURING TRUST:**

“Think about a brand you have trusted for a long time”. This scenario allowed us to understand purchase and brand relationships in the context of enduring trust. It also allowed us to examine the impact on purchasing and other KPI’s of trust built on only product considerations versus product and user experience considerations versus product, user experience and societal impact considerations.

3) **LOST TRUST:**

“Think about a brand you used to trust but no longer do.” This scenario allowed us to understand how trust is lost, and whether and how it can be regained.

Comparing data from scenario one to scenario two allowed us to understand the consumer rewards of brand trust when comparing their buying intentions, loyalty, advocacy and defense of brands they buy with and without trust.

NETTED VARIABLES

CONSUMER REWARDS FOR BRANDS THEY TRUST

The individual items that comprise the nets for the consumer behaviors reported on page 11 in the 2019 Edelman Trust Barometer Special Report: In Brands We Trust?

BUY FIRST (Q14 A & C)

- I am one of the first to try the new products/services of this brand when they come out
- I am happy to pay more for this brand's products/ services

STAY LOYAL (Q14 A & C)

- I am happy to share my personal data with this brand
- When I buy or use products or services in this category, it is almost always this brand, but I will experiment with other brands from time to time
- When I buy/use products/services in this category, it has to be this brand
- I will continue to buy this product even if a competitive brand is getting better reviews
- I will continue to buy this brand even if another brand suddenly becomes hot and trendy
- I will continue to buy this brand even if a competing brand comes along that is more innovative or technologically advanced
- I will continue to buy/use this brand even if something goes wrong with its latest products/services
- I will continue to buy this brand even if it takes a stand on a controversial societal or political issue that I strongly disagree with
- I will continue to buy this brand even if people I know are pressuring me to boycott it

ADVOCATE (Q14 A & C)

- I advocate for this brand even when I am not directly asked for advice
- I always recommend this brand if someone asks
- I like/rate what the brand is saying in social media
- I participate in the creation of the brand's media content

DEFEND (Q14 A & C)

- I defend this brand if I ever hear someone criticizing it
- I write rebuttals when I see people post negative comments about this brand on social media

NETTED VARIABLES

REASONS THEY TRUST A BRAND

The individual items that comprise the nets for the reasons consumers trust a brand reported on page 16 in the 2019 Edelman Trust Barometer Special Report: In Brands We Trust?

PRODUCT EXPERIENCE REASONS (Q126C)

- It delivers good quality products or services
- It charges a fair price for its products or services
- The brand gets good ratings and reviews

CUSTOMER EXPERIENCE REASONS (Q126C)

- It has always treated me and others well
- It quickly addresses customer service problems
- They have done a good job protecting the privacy and security of my data and personal information

IMPACT ON SOCIETY REASONS (Q126C)

- It does not support social or political policies that I object to
- It gets involved in causes and issues that I feel they have an obligation to address
- They treat their employees well

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