

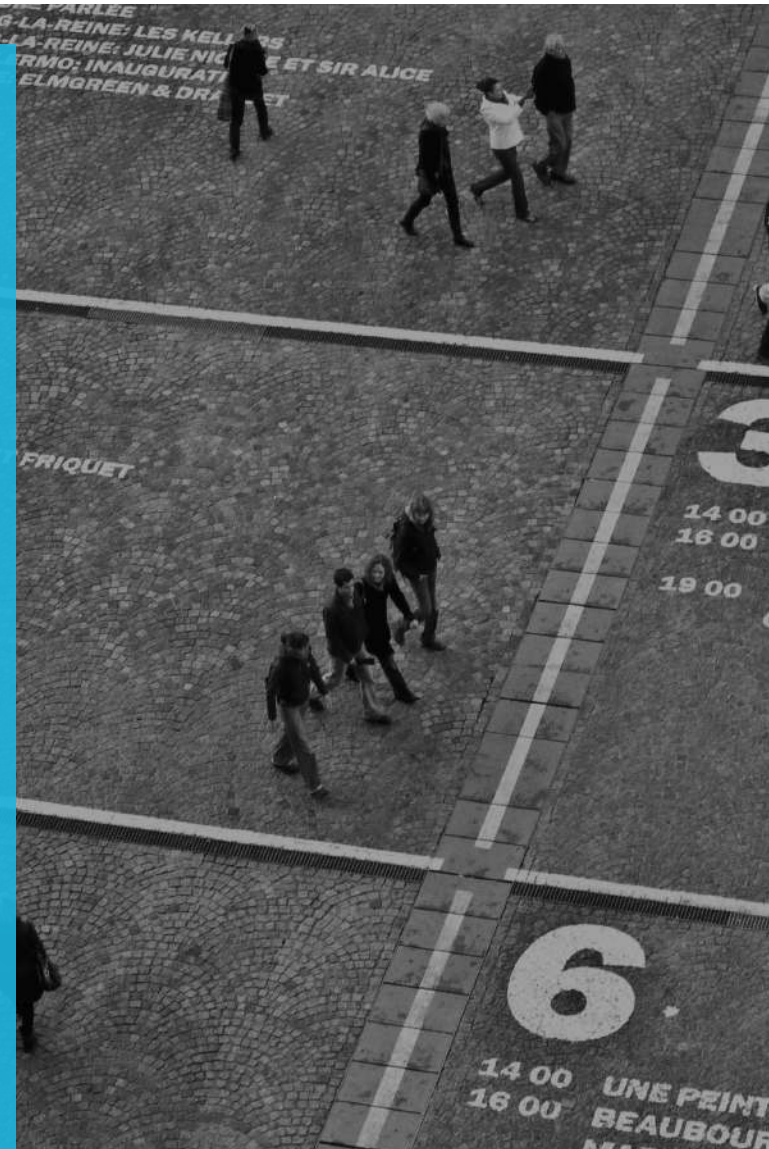
**2019 EDELMAN
TRUST BAROMETER SPECIAL REPORT**

In Brands We Trust?

France



Edelman



Méthodologie

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

Des Français de plus en plus concernés par l'impact sociétal des marques

Reasons why trusting the brands they buy is becoming more important for French consumers

GROWING CONCERNS ABOUT PRODUCT EXPERIENCE

60%

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

50%

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

64%

Net of societal-oriented concerns:

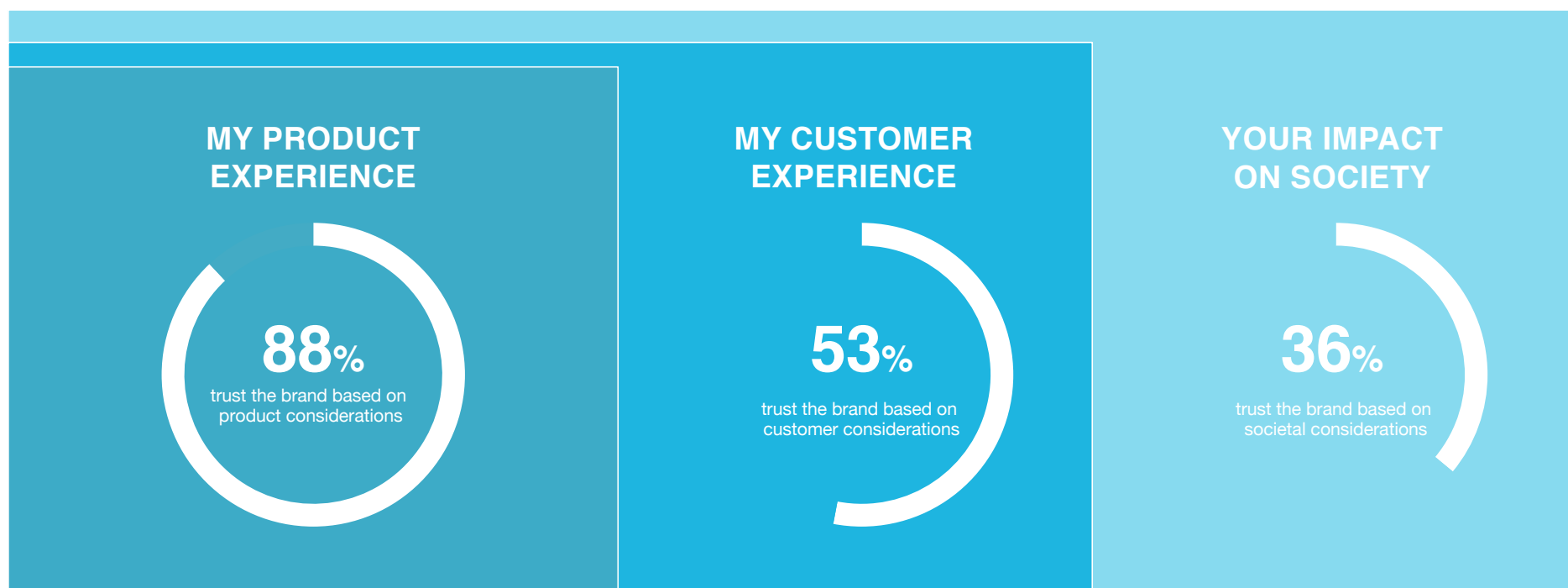
- Fake news and misinformation
- Brands more involved in societal issues
- I want brands to express my values

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). France. "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.



Et pourtant, c'est l'expérience produit qui construit l'essentiel de la confiance

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



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. France. "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.



**D'où vient ce
décalage ?**



Des consommateurs sceptiques sur la capacité des marques à réellement agir pour des causes sociétales

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

60%

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. France.



Leur capacité à inspirer et impulser le changement est questionnée

34% 41%

Brands have better ideas for solving our country's problems than government



-3 pts

y-to-y change

46% 49%

Brands can do more to solve social ills than government



-2 pts

y-to-y change

47% 48%

It is easier for people to get brands to address social problems than to get government to take action



-2 pts

y-to-y change



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. France.



Trop d'effets d'annonces, pas toujours suivis d'effets

Among those who have stopped trusting a brand because of its unethical behavior, percent who say the brand engaged in each type of behavior



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q116B. What caused you to lose trust in this brand? We are not interested here in what you think or assume untrustworthy brands do. We are interested in knowing what in particular it is about this brand that made you lose trust in it. Pick all that apply. Question asked of those who were assigned to scenario 2: Think about a brand you used to trust but no longer do. France, among those who said they lost trust due to unethical behavior (Q116B/11-19).





Comment reconquérir la confiance ?

Le risque majeur: atteindre le point de non-retour

“ There is a brand that I once trusted that has done something so inexcusable that **I'll never be able to trust it again** ”

39%

of French agree



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q70. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Q127. Is there a brand that you once trusted that has done something so inexcusable that you will never be able to trust it again? France.



La feuille de route pour reconquérir la confiance : un triptyque honnêteté-qualité-transparence

Percent who say that each action could help win back their trust in a brand

Be more honest with the public	41
Improve quality control practices	39
Stop acting like making money is their sole purpose	38
Improve customer service	35
Become more transparent about business practices	25
Fix the specific problem I had with how they treated me	24
Improve sustainability and environmental protection	24
Show more respect to their customers, employees and others	23
Issue a public apology and take responsibility for their actions	21
Give financial compensation to people they harmed	20
Fire bad actors within the organization	14
Get involved in important social issues	14
Replace their CEO	10
Start communicating with me on a personal level	10
Give me more control over how my personal information is used	8
Stay out of politics	6

Average number
of actions selected

3.5

2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q118B. Specifically, what could this brand do to win back your trust? Pick all that apply. Question asked of those who were assigned to scenario 2: Think about a brand you used to trust but no longer do. France. Data is rebased to exclude those that said "none or above" or "there is nothing that this brand could ever do that would win back my trust." Number of actions is based on a score of 0-16, excluding those that said "none or above" or "there is nothing that this brand could ever do that would win back my trust."



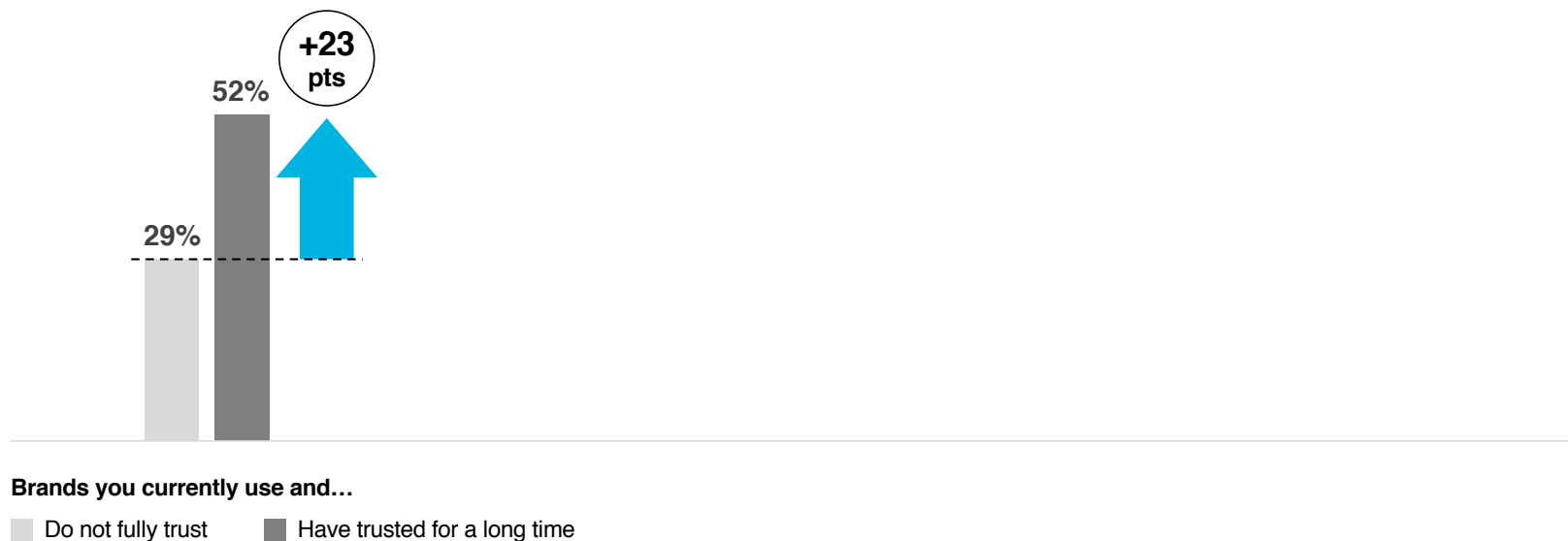
**Quand les marques
s'engagent de façon
crédible, les
bénéfices sont
nombreux**



Gagner en considération d'achat

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

BUY FIRST

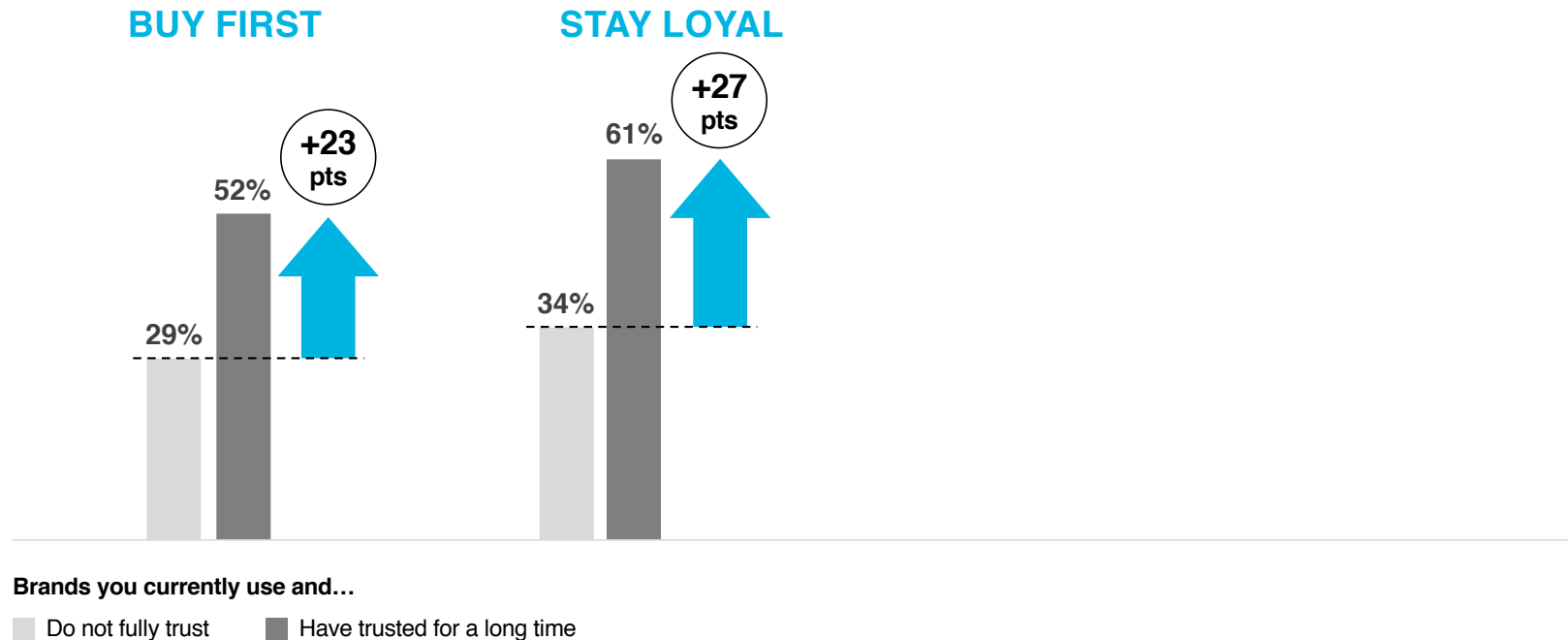


2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q14C. Continuing to think about the same brand, and in particular, what your relationship with that brand looks like, how well do each of the following describe how you relate to and feel about that brand? 9-point scale; top 4 box, describes 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. France. "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.



Accroître la fidélité

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

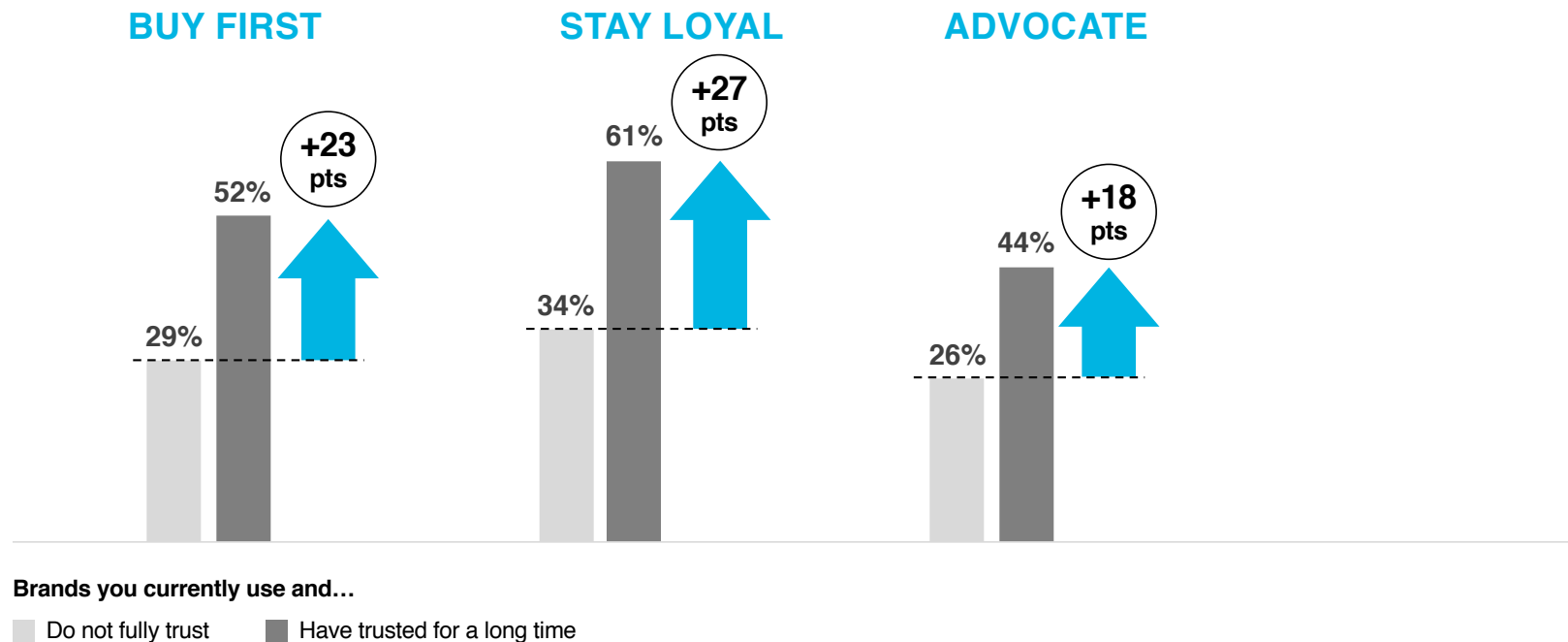


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Augmenter la prescription

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

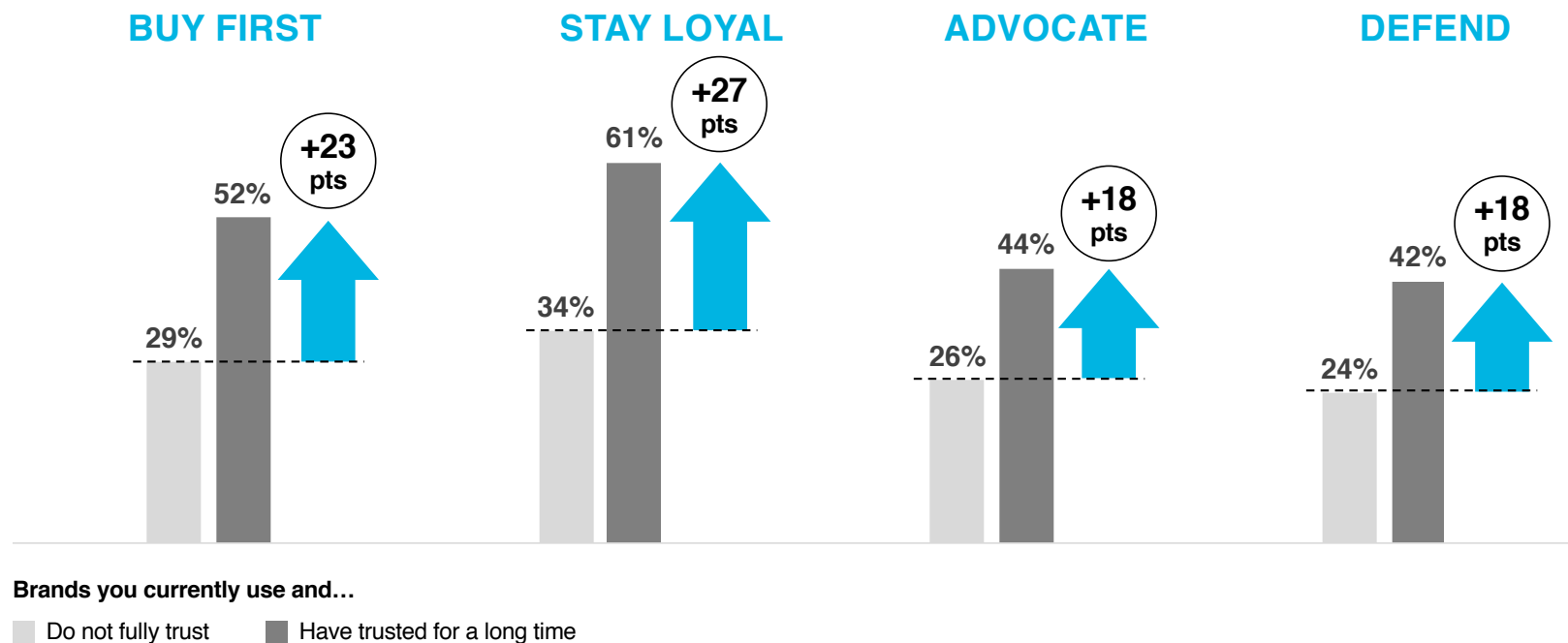


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Conduire les consommateurs à vous défendre

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



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**Des exemples qui nous
inspirent**

VEUVE CLICQUOT, PUISER SA RAISON D'ÊTRE DANS L'HISTOIRE DE LA MARQUE

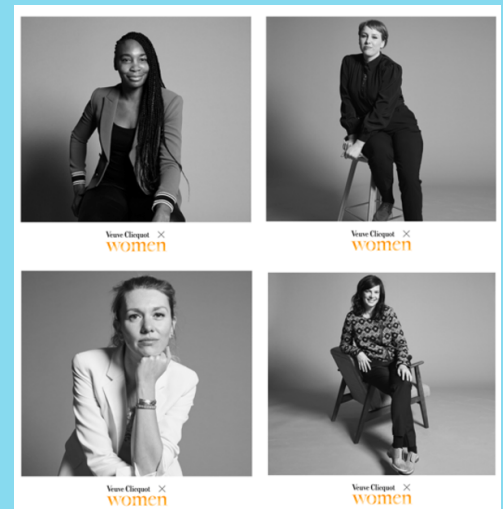
Product experience



Customer experience



Societal impact



MCDONALD'S, FAIRE DE CHAQUE DIFFICULTÉ UNE OPPORTUNITÉ

Product experience



Customer experience



Societal impact



EVIAN, CONJUGUER COURT TERME ET LONG TERME

Product experience



Customer experience



Societal impact

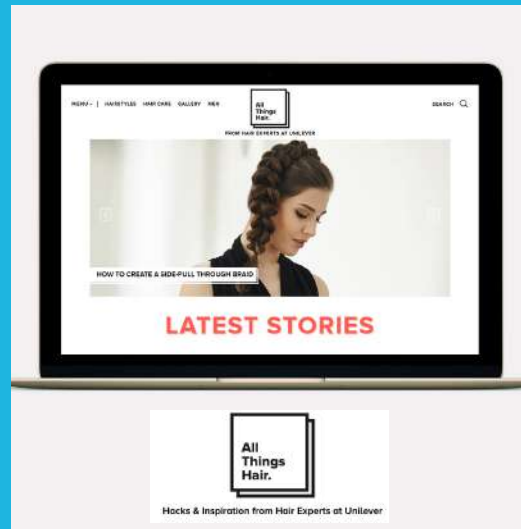


UNILEVER, ARBITRER SELON LA PERTINENCE ET L'UTILITÉ SOCIÉTALES

Product experience



Customer experience



Societal impact

Unilever warns it will sell off brands that hurt the planet or society

Marmite and Magnum among vulnerable brands as firm puts focus on sustainable business

Zoe Wood

@zoewoodguardian

Thu 25 Jul 2019 18:47 BST



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Unilever has warned it will sell off brands that do not contribute positively to society, with British favourite Marmite and Magnum ice-cream among the big names thought to be vulnerable to a cull linked to the company's sustainable business agenda.

Alan Jope, Unilever's chief executive, said it was no longer enough for consumer goods companies to sell washing powders that make shirts whiter or shampoos that make hair shinier because consumers wanted to buy brands that have a "purpose" too.



Les solutions pour éviter le "purpose washing"

#1

**ADRESSER LES ENJEUX
PRODUIT AVANT
DE VOUS PENCHER SUR
L'ENGAGEMENT SOCIÉTAL**

#2

**NE PLUS SE CONTENTER
DE FINANCER DES ONG,
MAIS VOUS TRANSFORMER,
VOUS, EN PRIORITÉ !**

#3

**TENIR VOS PROMESSES,
QUITTE À N'EN FAIRE
QU'UNE SEULE !**

#4

**PRÉSENTER VOTRE
FEUILLE DE ROUTE,
POUR CREDIBILISER
VOTRE AMBITION**

Merci.

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