2024 Edelman Trust Barometer

Special Report:

Brands and Politics

France Edition

Edelman Trust Institute

2024 Edelman Trust Barometer Special Report: Brands and Politics

Methodology

6th annual online survey on trust and brands

Fieldwork conducted: Apr 13 – 24, 2024

15
Countries

15,000
Respondents

1,000+/-
Respondents per country**

Brazil	**France**	Indonesia*	Saudi Arabia	UAE
Canada	Germany	Japan	S. Africa	UK
China	India	Mexico	S. Korea	U.S.

Data collected is representative of the general population across age, gender, region and ethnicity/nationality (where applicable) within each country

**The sample size varies by country from 955 to 1,002
14-market global data margin of error: General population +/- 1.1 percentage points (n=14,957)
Country-specific data margin of error: General population +/- 4.1 to 4.2 percentage points (varies by country based on sample size, n=955 to n=1,002)
Margin of error is calculated at the 99% confidence level

Global averages
Unless otherwise indicated, global averages are composed of 14 of 15 countries surveyed.

*Indonesia is excluded from all global averages.

Statistical significance

– 0 +   ○ **Significant change**

Indicates a statistically meaningful difference or change in the data that is unlikely to be due to chance or a random fluctuation.

All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level.

Shortened question text
Throughout the report, question text has been edited for readability.
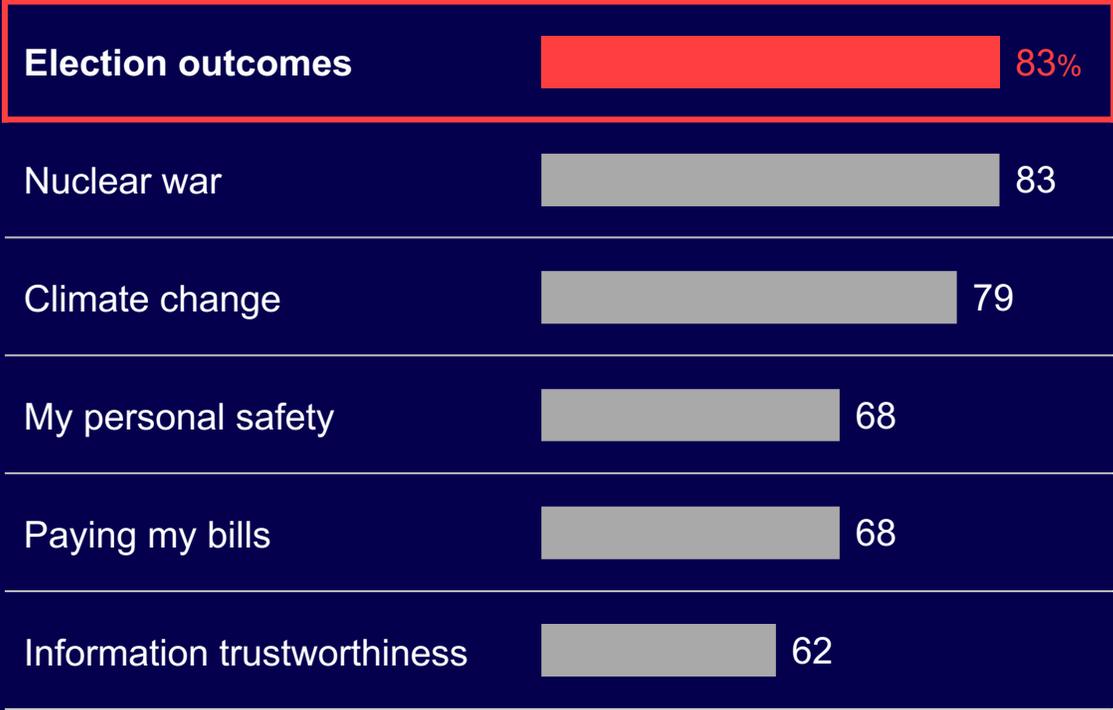
For more details on global averages, country-specific sample information, or to see the full text for any shortened statements, please see the Technical Appendix

All content in this report are the property of the Edelman Trust Institute

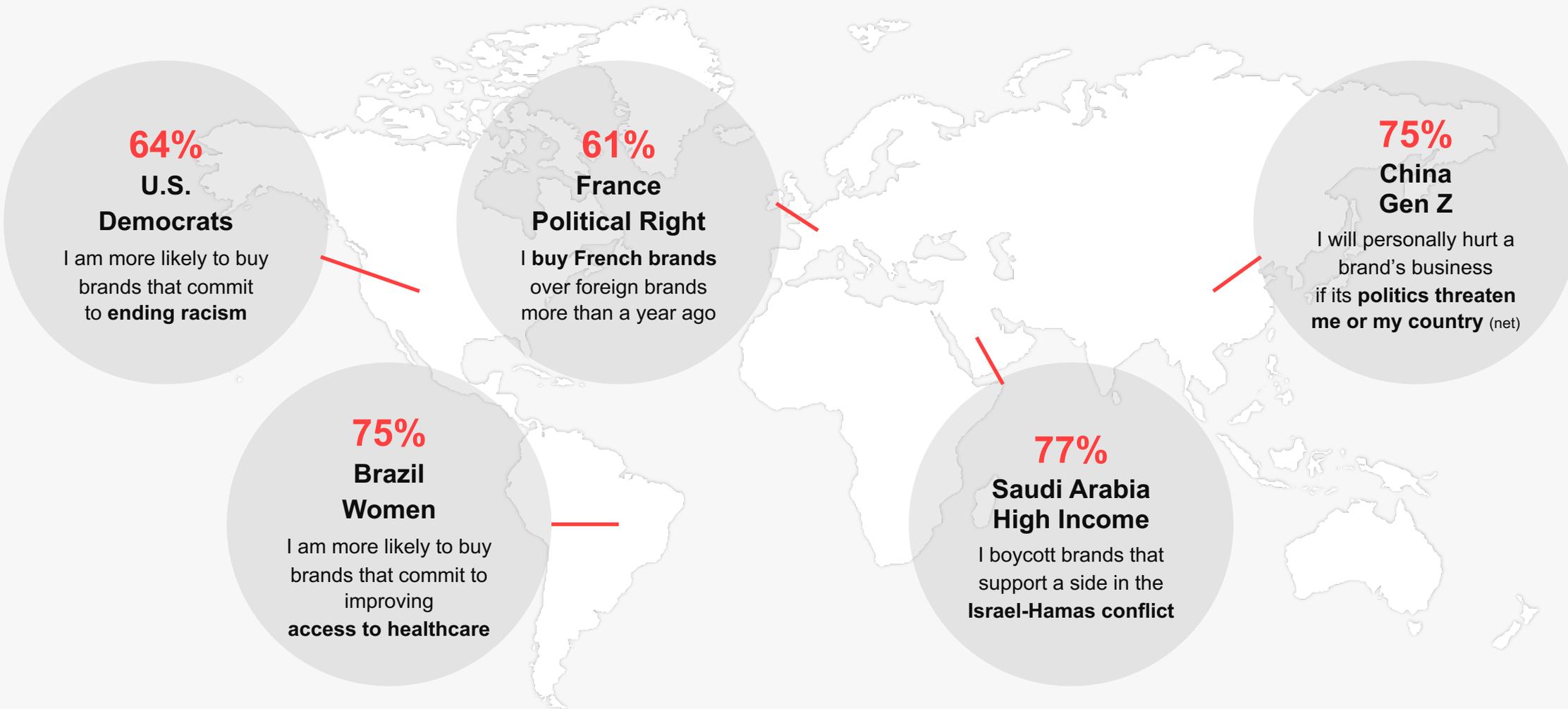# Concern Over Election Outcomes Tops Societal Fears in France

I worry about…

Election outcomes		**83%**
Nuclear war		83
Climate change		79
My personal safety		68
Paying my bills		68
Information trustworthiness		62

Brands in the Crosshairs: Consumers Buy or Boycott to Express Political Power

64%
**U.S.
Democrats**
I am more likely to buy brands that commit to **ending racism**

61%
**France
Political Right**
I **buy French brands** over foreign brands more than a year ago

75%
**China
Gen Z**
I will personally hurt a brand's business if its **politics threaten me or my country** (net)

75%
**Brazil
Women**
I am more likely to buy brands that commit to improving **access to healthcare**

77%
**Saudi Arabia
High Income**
I boycott brands that support a side in the **Israel-Hamas conflict**

Politics Upends the Business of Brands

Politically Driven Buying:
In France, More than 5 in 10 Buy Brands to Express Their Politics

Percent who say

GLOBAL 14 | – 0 + | ◯ **Significant change** | ■ **Politics†**

I buy, choose, or avoid brands based on my politics
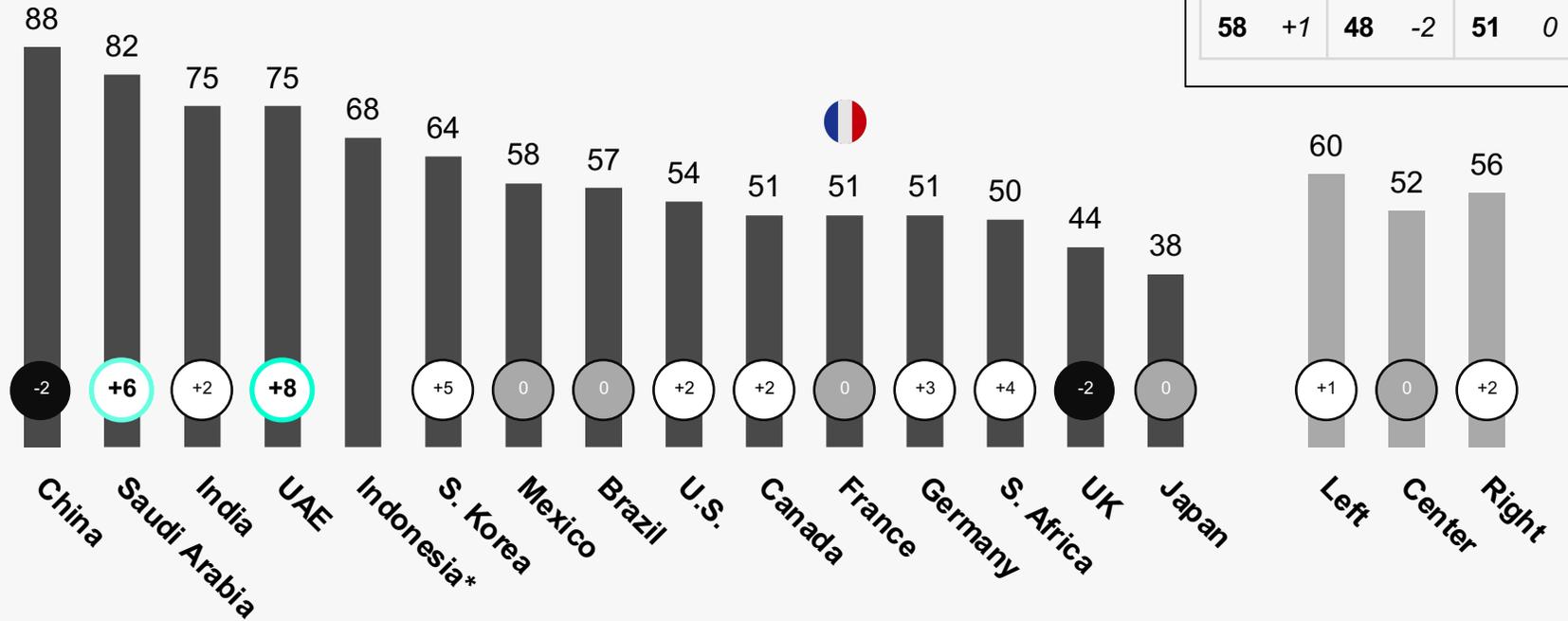
I have switched brands over politics

My brand choices express my political opinions

I have boycotted a brand because it stayed silent on a political issue

60%

+2 pts

Change, June 2023 to June 2024

🇫🇷 France politics		
Left	**Center**	**Right**
58 *+1*	**48** *-2*	**51** *0*

Bar chart values:

Country	Value	Change
China	88	-2
Saudi Arabia	82	+6
India	75	+2
UAE	75	+8
Indonesia*	68	
S. Korea	64	+5
Mexico	58	0
Brazil	57	0
U.S.	54	+2
Canada	51	+2
France	51	0
Germany	51	+3
S. Africa	50	+4
UK	44	-2
Japan	38	0
Left	60	+1
Center	52	0
Right	56	+2

Brand Nationalism: Israel-Hamas Conflict Sparks Boycotts
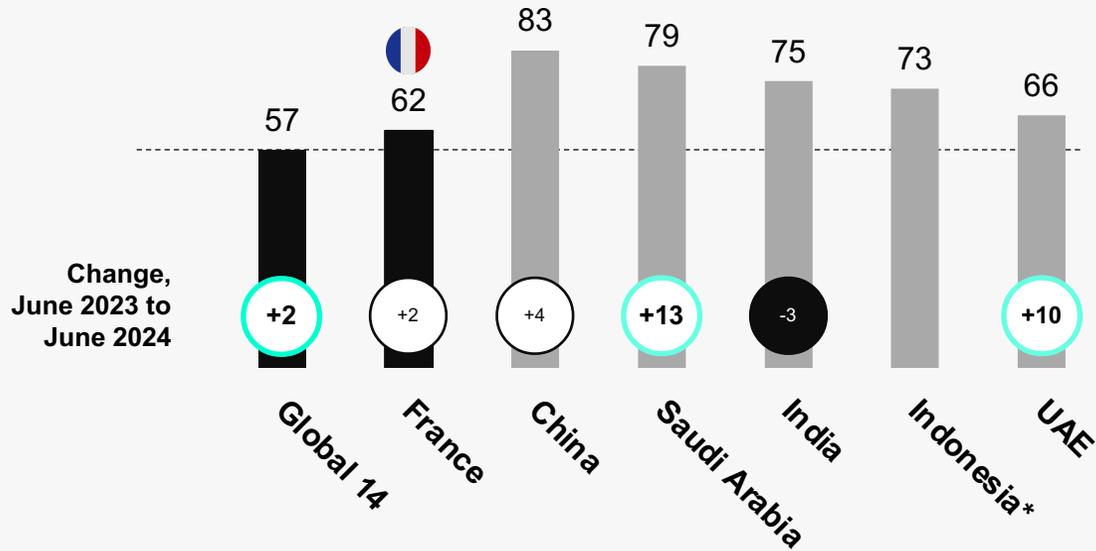
Percent who agree

| GLOBAL 14 | ● — ⓪ — ⊕ | ◯ Significant change |

I am buying my country's brands instead of foreign brands **more often** today than I was a year ago

◻ Top 5 of 15 countries

	Global 14	France	China	Saudi Arabia	India	Indonesia*	UAE
Value	57	62	83	79	75	73	66
Change, June 2023 to June 2024	+2	+2	+4	+13	-3		+10

| GLOBAL 13 excl. China |

I am **boycotting brands** that support a side on the **Israel-Hamas conflict**

◻ Top 5 of 14 countries
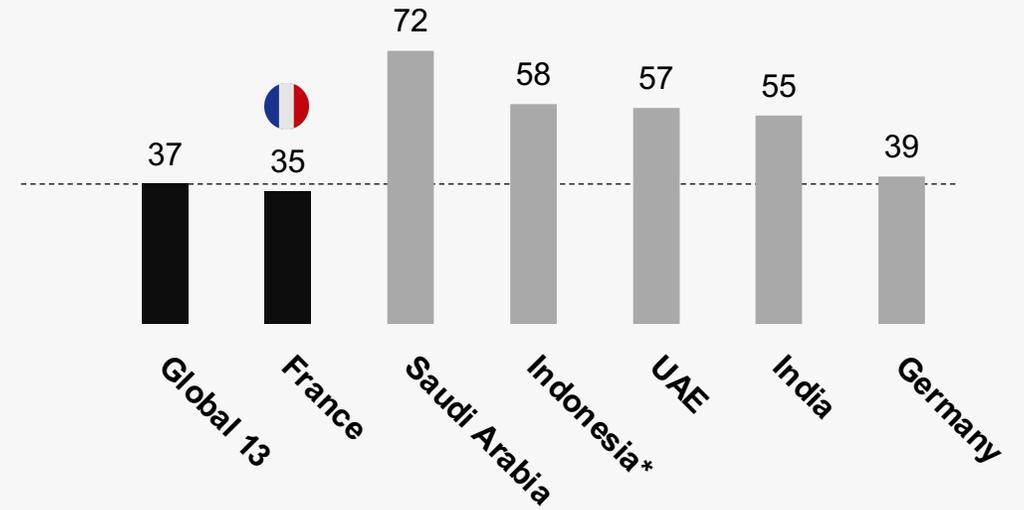
	Global 13	France	Saudi Arabia	Indonesia*	UAE	India	Germany
Value	37	35	72	58	57	55	39

Brand Nationalism: In France, Over 8 in 10 Boycott Foreign Brands

Percent who agree

GLOBAL 14   ■ Politics†

France politics

Left	Center	Right
83	n/a	87

There are foreign brands **I will not buy** because of the **countries in which they are headquartered**

78%

Country	Value
S. Korea	95
Japan	92
China	87
France	84
India	82
Germany	81
Canada	80
Saudi…	80
U.S.	74
UK	73
UAE	71
Brazil	69
Indonesia*	69
Mexico	64
S. Africa	62
Left	76
Center	78
Right	82

Need for Trust Expands: Trust in Parent Company Rises as Critical Purchase Criteria

Percent who say, in France

— ⊙ ⊕ Change, June 2023 to June 2024   ◯ **Significant change**

When it comes to the brands I buy or use, this is **important or a dealbreaker**

Top 8 of 13:

Good value for the money	0	93
Offers the best quality	+4	93
High quality customer service	**+5**	88
Convenient to find, buy, and use	+4	87
I trust it	+1	87
Has a good reputation	+3	83
I love it	**+8**	82
I trust the company that owns the brand	**+7**	79

Trust remains a top 5 purchase criteria

Greater scrutiny of a brand's parent company

In Face of Political Pressure, Brands Can't Hide

Percent who say, in France

When **under pressure to take a side**
on a controversial or political issue, the brand…

Can do either

14

16

**Must avoid
taking a position**

**Must take
a position**

70

Your Brand, My Politics

My Brand Choices Express My Political Values

Percent who agree

GLOBAL 14   − 0 +   ◯ **Significant change**   ▇ **Politics†**

Using a brand from a particular country **signals approval of that country's government**

	🇫🇷 **France politics**		
	Left	**Center**	**Right**
	47 *+11*	**n/a**	**41** *+3*

Significant increases in UAE, France, Mexico, Germany

China 79 (+4)
India 70 (+4)
Saudi Arabia 62 (+6)
UAE 62 (**+12**)
Indonesia* 57
France 🇫🇷 44 (**+10**)
Canada 43 (+7)
S. Africa 43 (+4)
U.S. 41 (+5)
Mexico 40 (**+8**)
UK 40 (+6)
Germany 39 (**+10**)
S. Korea 37 (-2)
Japan 33 (+3)
Brazil 31 (+1)

Left 44 (+3)
Center 41 (**+4**)
Right 46 (+4)

47%

+5 pts

Change, June 2023 to June 2024

My Brand Choices Define My Social Identity

Percent who say, in France

● ─ ⓪ ─ ⊕   ◯ **Significant change**

I feel a connection to
people who use the same brands I do

56
41
32

Change, June 2023 to June 2024

+5   0   **+17**

Age 18-34   **35-54**   **55+**

I judge people
on the **brands they buy or use**

40
29
16

Age 18-34   **35-54**   **55+**
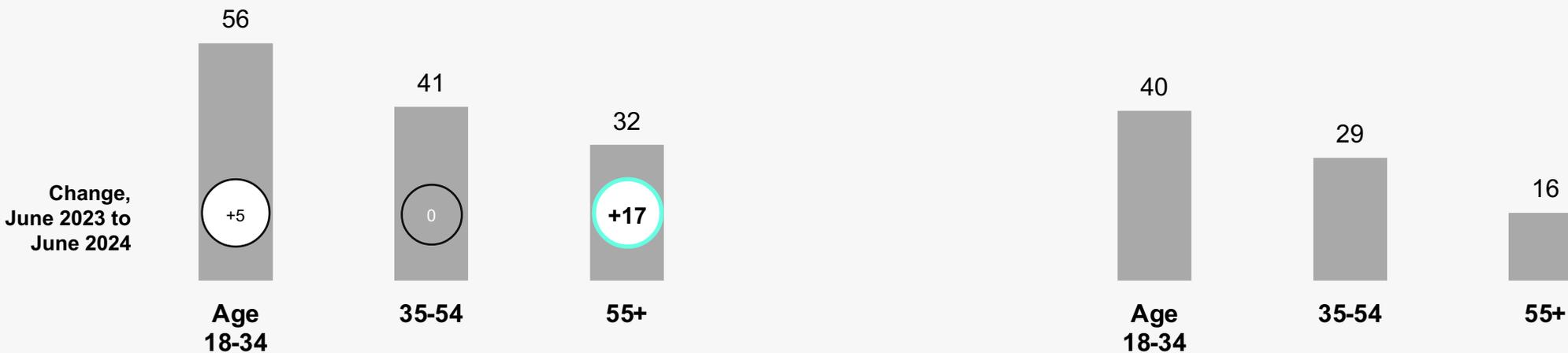
In France, Nearly 3 in 4 See Brands as Political

Percent who say

GLOBAL 14

I feel brands are doing things
I consider to be
political or politically motivated

*Over 1 in 3 French consumers believe
half or more brands are political*
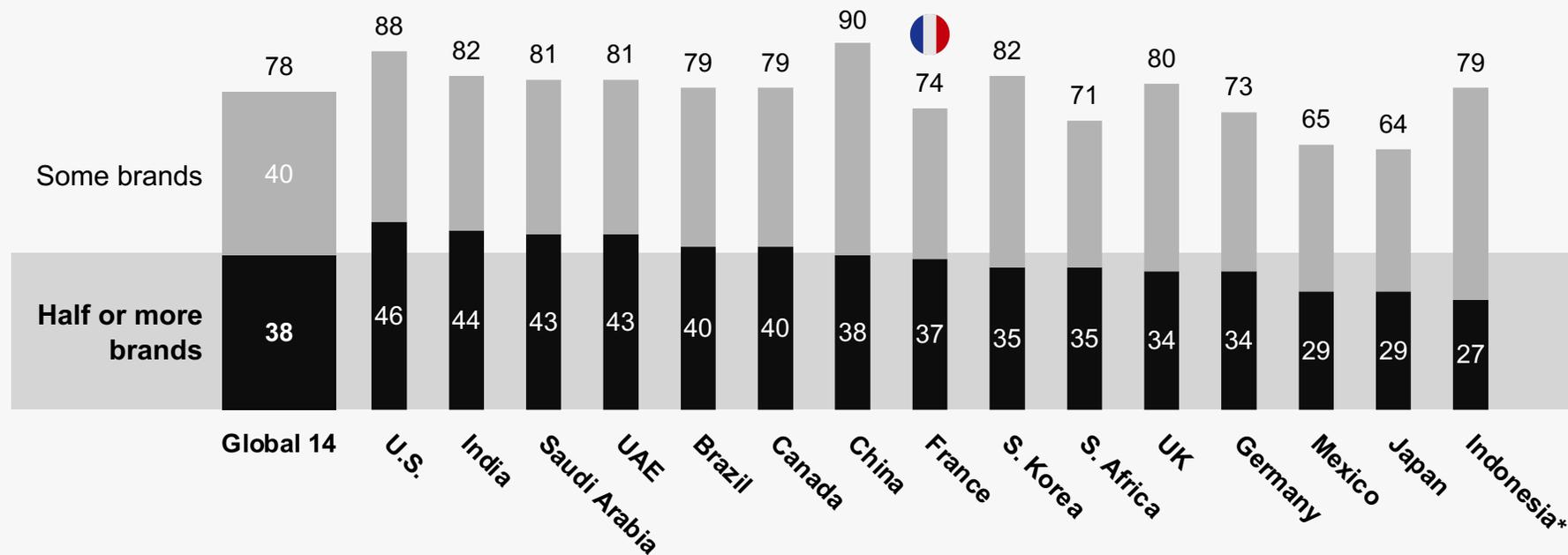
Some brands

Half or more
brands

	Global 14	U.S.	India	Saudi Arabia	UAE	Brazil	Canada	China	France	S. Korea	S. Africa	UK	Germany	Mexico	Japan	Indonesia*
Total	78	88	82	81	81	79	79	90	74	82	71	80	73	65	64	79
Half or more brands	38	46	44	43	43	40	40	38	37	35	35	34	34	29	29	27
Some brands	40															

Everyday Brand Actions Seen as Political

Among the 78% globally who feel at least some brands are doing political things, percent who say

GLOBAL 14

I consider these brand actions to be political

Politics

	Global 14	Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea	Left	Center	Right
Take a stand on issues																			
Encourage voting																			
Hire influencers with political opinions																			
Use social platforms that host extremists																			
Work on regulations																			
Recruit diverse employees																			
Advertise near political news																			
Reduce climate impacts																			
Sponsor the Olympics																			

Legend:
- More than 35% agree
- 25-35%
- 10-24%
- Less than 10% agree

Silence Is Political: When Brands Say Nothing, Nearly 1 in 2 Assume the Worst

Percent who say, in France

▨ **Politics**

If a brand doesn't communicate its actions to address societal issues, **I assume it is doing nothing or hiding something** (net)

49%

Nearly 6 in 10 young people assume the worst when brands stay silent

	Age 18-34	35-54	55+	Left	Center	Right
	58	44	48	54	n/a	49

In France, Brands Expected to Do More, Not Less

Percent who say, in France

On these issues, brands…

are going too far ←   **should do more** →

Issue	are going too far	should do more
Climate	7	58
Fair pay	7	53
Misinformation	9	52
Retraining	9	50
Public health	14	35
Voter participation	14	33
Diversity	15	33
Weigh in on politics	21	23

Defining Your Brand's Permission to Act

Action Drives Trust: Each Brand's Permission Space Creates Clarity for Action

Shared values, along with the political and cultural context, define when, why, and how a brand should act—whether the action be big or small, external or internal

The political and cultural context is highly volatile and can quickly expand or limit a brand's permission space

Anchor Brand Action in Shared Values

Percent who say, in France

I need to share values with a brand in order to buy it (net)

72%

… and the categories where this matters most to me are:	France	Age 18-34	35-54	55+
Personal health	37	**40**	35	36
Food and beverage (avg)	31	31	**32**	29
Fashion and apparel	30	**40**	31	23
Pharmaceuticals	27	29	23	**30**
Cosmetics and beauty	25	**36**	25	17
Financial services	24	**28**	21	25
Car/automobile	23	20	21	**26**
Personal technology	20	**24**	20	19
Social media	18	**31**	21	9

Age with highest agreement

For many brand categories, shared values matter more to younger ages

Don't Compromise Your Values When Under Attack

Percent who agree

GLOBAL 14 | ▪ Politics[†]

I am **less likely to trust a brand that surrenders** to politically motivated attacks rather than defends its values

61%

Majority in 13 of 15 countries will lose trust if a brand fails to defend its values

	🇫🇷 France politics	
Left	**Center**	**Right**
61	n/a	61

Bar chart values:

Country	Value
China	80
India	70
Brazil	65
Saudi Arabia	65
S. Africa	65
U.S.	65
UAE	64
Mexico	61
UK	61
Canada	59
France	58
Indonesia*	58
S. Korea	51
Germany	47
Japan	43

Politics	Value
Left	60
Center	58
Right	65

Avoid Contextual Naïveté:
Map Your Brand's Permission to Act Against the Local Cultural Context

Analysis comparing the percent who say brands should do more vs brands are going too far

GLOBAL 14

Consensus for more brand action on each issue:

- 🟢 Strong consensus
- 🟡 Weaker consensus
- 🔴 Little consensus

	Global 14	Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea
Climate	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Fair pay	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢
Retraining	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟡	🟢	🟢	🟢
Misinformation	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢	🟢	🟡	🟢	🟢	🟢
Public health	🟢	🟢	🟡	🟢	🟢	🟢	🟡	🟢	🟡	🟡	🟢	🟢	🟡	🟢	🟡	🟢
Diversity	🟢	🟡	🟡	🟢	🟢	🟢	🟡	🟢	🟡	🟢	🟢	🟢	🟡	🟢	🟢	🟢
Voter participation	🟡	🟢	🟡	🟡	🟢	🟢	🟢	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟢
Weigh in on politics	🟡	🔴	🔴	🟡	🟡	🟡	🟡	🔴	🟡	🟡	🟡	🟡	🟡	🔴	🟡	🟢

To Know Your Audience Is to Know Their Politics

Analysis comparing the percent who say brands should do more vs brands are going too far, in France

Consensus for more brand action
on each issue:

🟢	Strong consensus
🟡	Weaker consensus
🔴	Little consensus

	Left	Center	Right
Climate	🟢	🟢	🟢
Retraining	🟢	🟢	🟢
Misinformation	🟢	🟢	🟢
Fair pay	🟢	🟢	🟢
Public health	🟢	🟢	🟢
Voter participation	🟢	🟢	🟡
Diversity	🟢	🟡	🟡
Weigh in on politics	🟡	🔴	🔴

Greater mass appeal across political divides

More opportunity for brands to provoke conversation
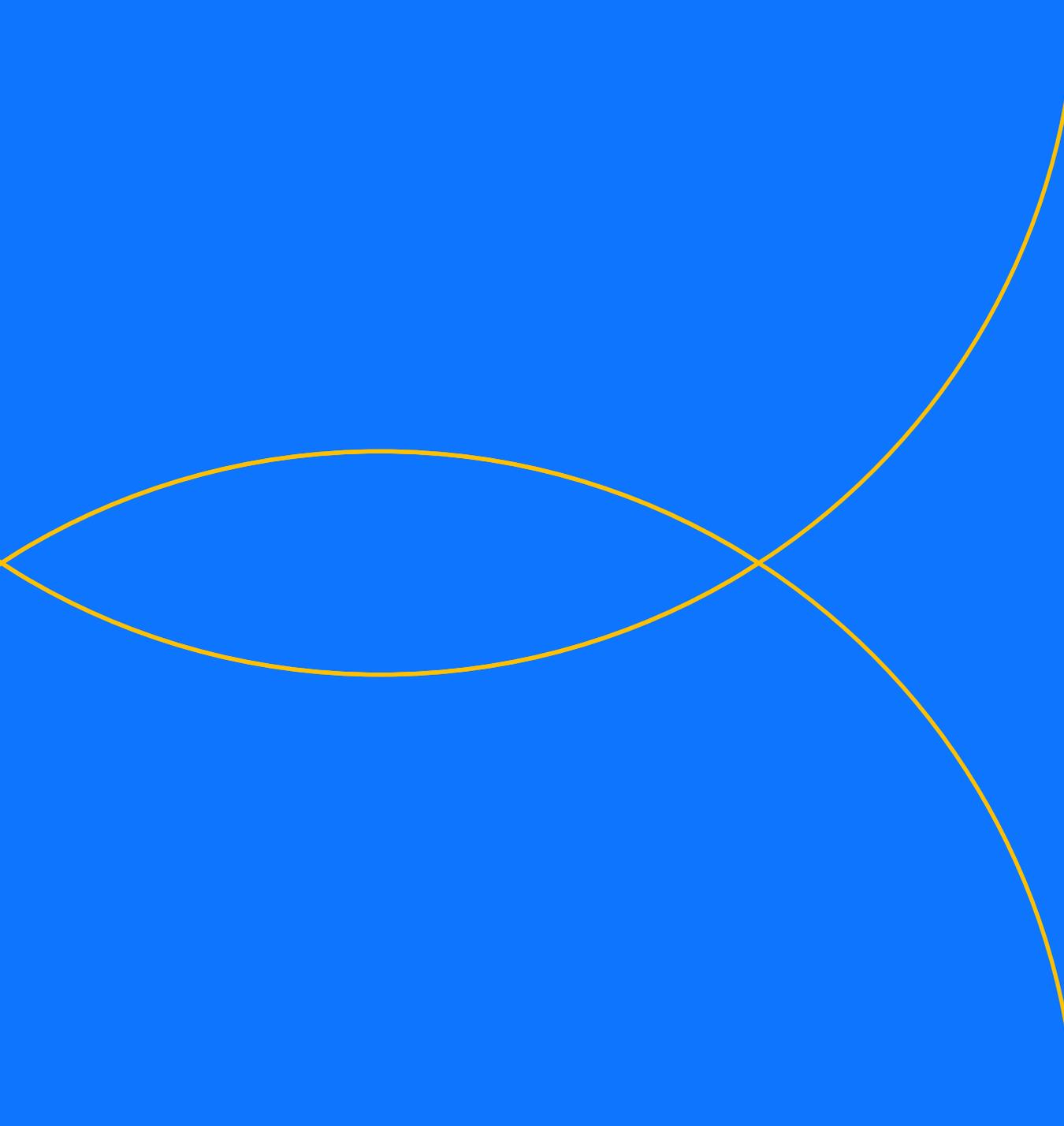
Your Permission Space Is Your Obligation to Act

Brands That Act on Good Values Have More Value

Percent who agree, in France

− ⭘ ⊕ Change, June 2023 to June 2024   ⭘ **Significant change**

Even if two products are almost identical,
there are brands worth paying more for because…

of the **good they do in the world**

they have **earned my trust**

51

+8 pts

53

+1 pt

Expert and Everyday Voices Most Credible; Ensure Brand Ambassadors Live Your Values

Percent who say, in France

⊖――⓪――⊕ Change, June 2023 to June 2024 ◯ **Significant change**

I consider each to be a **credible brand spokesperson**

Scientist, academic expert	+3	52
Person like myself	+6	51
Brand employee	+6	38
Brand CEO	+3	30
Celebrity, sports star	+1	23
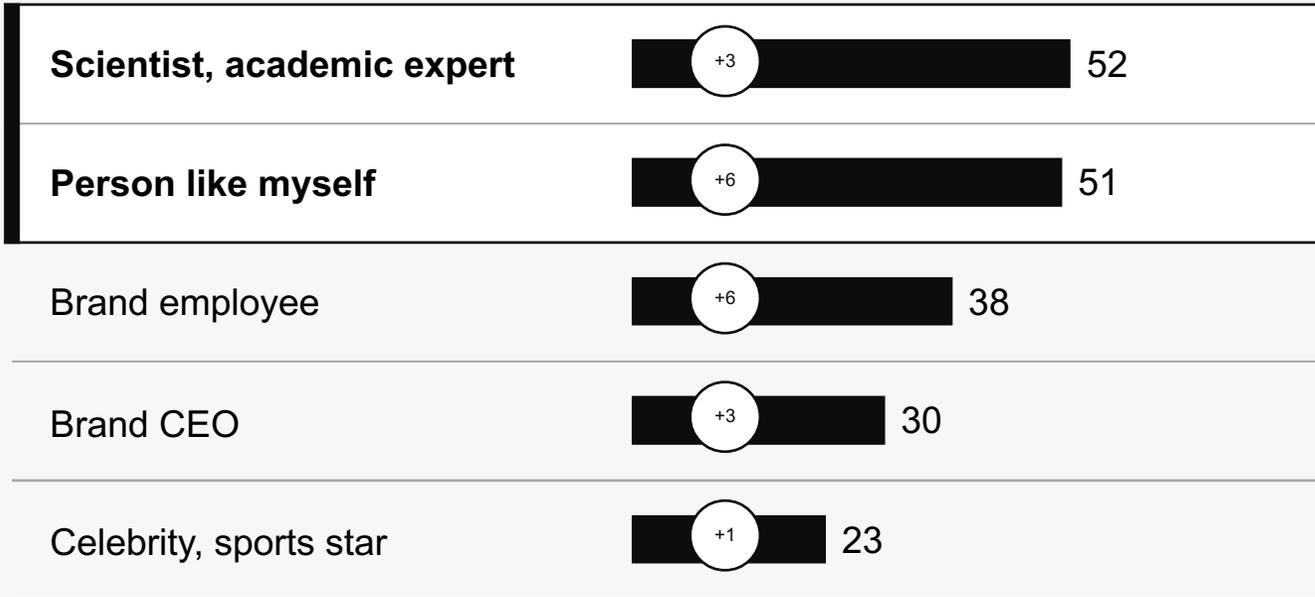
Brands should fire spokespeople who **go against the brand's values** in their private lives

54%

Brand Values Are Made and Broken in the Media; Don't Rely on Advertising Alone to Convince Me of Your Impact

Percent who say, in France

This is where I find out about
brands' positive impact on society

Top 5 of 9

#1	My personal experiences
#2	The news media
#3	Search
#4	Special interest media
#5	Online reviews
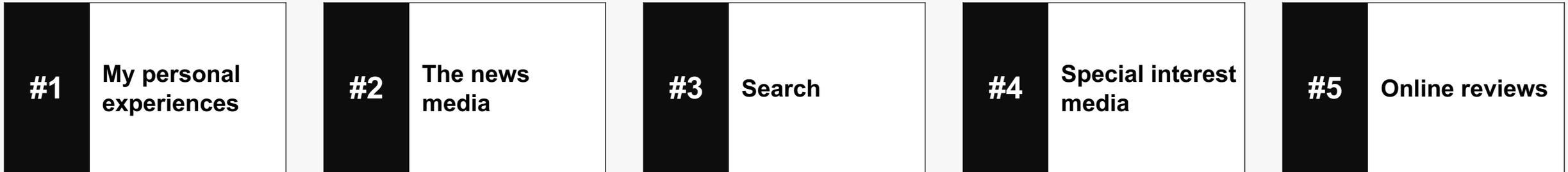
For Young Adults, Social Media is the Battleground for Trust

Percent who say

France   ● — 0 — ⊕   ◯ **Significant change**

GLOBAL 11 excl. China, Saudi Arabia, UAE

In the last year, an **influencer has increased my trust in a brand**

Globally, among the 32% who were upset by a brand in the last year:

This is **where I learned a brand did something to upset me**

Change, Nov 2020 to June 2024

	19	8	3
	+1	-1	0
	Age 18-34	**35-54**	**55+**

	Age 18-34	35-54	55+
Social media	**#1**	#3	#3
My personal experience	#2	#2	#2
In the news	#3	**#1**	**#1**

Consumers Will Protect the Brands They Trust

Percent who say, in France

I'm more likely to do this on behalf of a brand I fully trust vs one I do not

Purchase (net)

Buy new products
Buy it even if it's more expensive

62%

Stay loyal (net)

Do not shop around for other brands
Even if it makes a mistake
Even if others accuse it of wrongdoing

68%

Advocate

Recommend the fully trusted brand
to other people

50%

Brands and Politics:
How to Live Your Values and Earn Trust in a Politicized Culture

1

Don't be paralyzed by politics

Today, culture is politics and many everyday brand actions can be seen as political. In a world where silence is a stance, the question isn't "should I get involved in politics?" but rather "how do I navigate politics?"

2

Act multi-local

Against a backdrop of geopolitical tension and polarization, brands must be agile and adaptable. They must live their values locally and demonstrate positive impact everywhere they do business.

3

Know *their* politics

To know your audience means to know their politics—a fundamental difference in how relevance and trust are earned today. Be authentic and defend the values you share with customers and employees.

4

Action drives trust

Good business is powered by action and every brand has an opportunity to act. Know your brand's unique permission space for clarity on when, why, and how to act.

Appendix: Supplemental Data

Full List of Brand Purchase Criteria, Across Countries

Percent who say When it comes to the brands I buy or use, this is important or a dealbreaker…

Significant change* +/- June 2023 to June 2024	Global 14		Brazil		Canada		China		France		Germany		India		Indonesia*		Japan		Mexico		Saudi Arabia		S. Africa		S. Korea		UAE		UK		U.S.	
	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-
Good value for the money	91	0	93	1	95	3	92	2	93	0	87	0	87	-3	91		93	1	90	-3	85	-3	93	1	87	0	89	1	95	4*	90	-3
Offers the best quality	90	1*	93	0	90	0	92	1	93	4	86	2	88	-2	93		91	9*	90	-3	86	-2	93	3	88	3	89	-1	94	6*	91	0
I trust it	88	0	92	4	91	2	91	0	87	1	80	-2	89	0	91		94	2	85	-1	85	0	91	4	87	2	88	-1	88	0	90	0
High quality customer service	87	4*	92	2	83	4	92	2	88	5*	79	7*	89	-1	88		87	11*	86	1	84	1	88	2	88	5*	87	1	86	9*	86	7*
Has a good reputation	86	4*	92	4*	90	9*	92	3	83	3	77	7*	88	1	88		83	8*	84	0	85	2	89	7*	86	3	87	1	89	9*	86	4
Convenient to find, buy, and use	86	4*	87	3	86	2	88	1	87	4	80	5	85	1	89		90	2	87	1	86	2	86	2	88	4	87	1	86	2	87	1
I love it	85	4*	83	12*	86	7*	90	1	82	8*	76	4	85	-1	88		86	1	85	0	85	2	89	7*	85	1	89	5	83	7*	86	3
I trust the company that owns the brand	82	5*	84	2	83	9*	91	2	79	7*	79	3	85	2	79		86	6*	77	6	83	1	81	5	72	3	84	2	77	5	84	8*
Reflects me as a person	81	5*	86	6*	76	10*	93	5*	75	7*	75	8*	84	1	81		83	0	78	8*	81	-1	83	12*	83	4	87	6*	72	7*	77	4
Treats its employees well	78	6*	87	6*	74	6	87	6*	79	8*	70	2	80	1	82		66	8*	74	5	78	2	82	8*	74	9*	83	6*	75	8*	80	9*
Has a small climate impact	76	3*	80	0	72	4	92	9*	74	0	72	3	81	0	85		64	6	81	2	76	-1	78	9*	76	4	81	5	69	4	69	4
Has a clear mission	73		77		70		83		72		69		81		77		58		75		77		76		65		82		64		68	
Headquartered in my country	70	7*	69	9*	69	7*	78	5	78	5	66	3	80	4	70		55	10*	72	7*	77	5	67	7*	62	10*	73	7*	59	5	72	10*

Politically Driven Buying, Across Demographics

Percent who say, in France

● — ⊙ — ⊕   ○ **Significant change**

I buy, choose, or avoid brands based on my politics

I have switched brands over politics

My brand choices express my political opinions

I have boycotted a brand because it stayed silent on a political issue

54%

+2 pts

Change, June 2023 to June 2024

Gender | Age | Income

Men	Woman		18-34	35-54	55+		Low	Middle	High
53	50		64	54	43		53	52	50
+1	0		0	+1	+1		-4	+3	-1
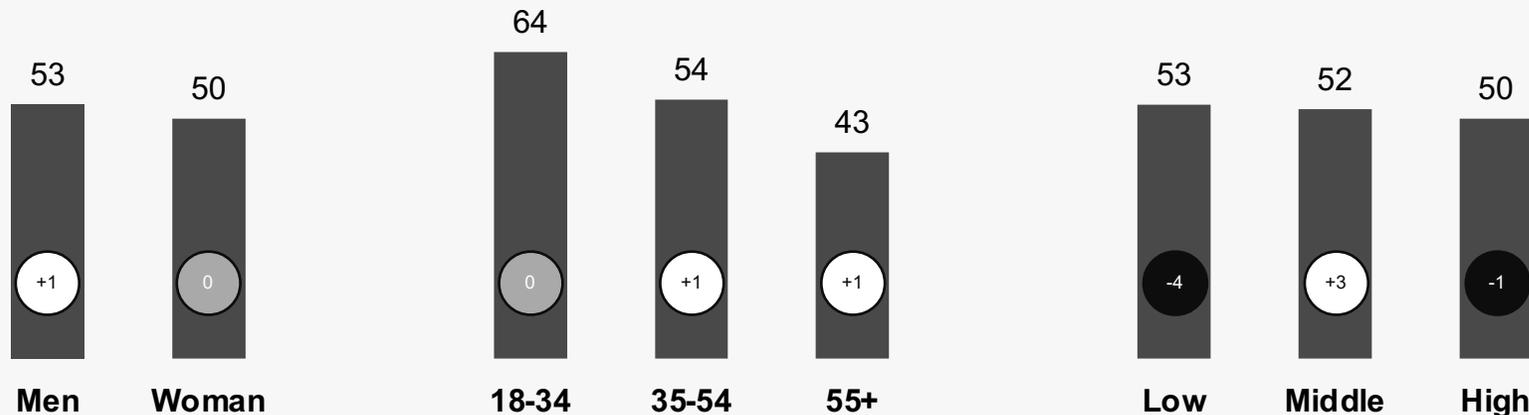
Everyday Brand Actions Seen as Political: Full Data

Among the 78% globally who feel at least some brands are doing political things, percent who say

GLOBAL 14

I consider these brand actions to be political	Global 14	Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea	Left	Center	Right
Take a stand on issues	33	32	43	34	31	38	33	37	28	34	33	26	40	36	23	28	37	33	43
Encourage voting	32	31	30	37	35	33	36	34	26	33	44	22	39	30	32	17	37	30	33
Hire influencers with political opinions	32	29	35	36	39	29	24	28	32	34	38	26	40	41	23	28	36	20	32
Use social platforms that host extremists	31	36	43	29	25	29	28	36	31	33	38	22	35	30	19	28	35	28	30
Work on regulations	27	28	27	33	28	27	30	24	23	27	34	22	33	29	30	20	28	30	25
Recruit diverse employees	26	24	22	34	24	26	19	22	31	33	32	19	40	24	19	17	28	29	29
Advertise near political news	26	24	29	31	32	23	19	27	23	27	33	20	32	25	21	25	30	18	21
Reduce climate impacts	22	21	20	29	21	24	23	20	18	27	23	17	32	19	15	12	28	25	19
Sponsor the Olympics	19	16	15	26	19	22	17	14	18	24	20	18	28	19	19	15	25	21	24
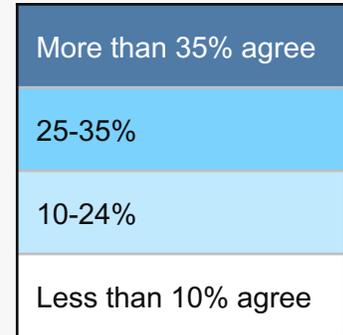
Legend:
- More than 35% agree
- 25-35%
- 10-24%
- Less than 10% agree

Boycotts of Brands From Foreign Countries

Percent who say

I will avoid or not buy brands from this country	Global 14	Brazil	Canada	China	France	Germany	India	Indonesia *	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	UK	U.S.
I will not buy at least one foreign brand because of the countries in which they are headquartered (net)	**78**	**69**	**80**	**87**	**84**	**81**	**82**	**69**	**92**	**64**	**80**	**62**	**95**	**71**	**73**	**74**
China	45	22	56		62	55	61	23	82	27	23	25	75	25	47	52
Saudi Arabia	44	47	54	38	66	60	31	15	69	38		28	62	12	52	48
India	42	42	44	60	56	52		45	67	32	33	31	66	29	31	31
UAE	41	41	46	39	64	55	24	13	68	34	28	23	63		45	41
Mexico	35	31	30	44	47	38	28	34	67		39	24	60	30	25	25
Brazil	33		31	39	46	39	28	32	67	25	35	17	58	24	24	24
S. Korea	31	29	27	37	42	38	30	13	68	26	29	21		24	26	24
Japan	22	15	18	51	33	25	15	8		14	22	15	46	14	13	15
Canada	21	20		32	24	16	26	28	40	14	35	13	26	22	8	9
France	21	21	11	28		13	21	29	35	15	41	12	26	29	14	14
UK	21	21	11	33	22	18	19	27	35	21	35	9	23	25		10
U.S.	20	13	10	36	29	22	16	33	34	11	41	12	18	24	12	
Germany	19	22	15	27	16		19	21	35	17	29	12	24	23	10	16

To Earn Trust Abroad, Local Impact Matters

Percent who say

| GLOBAL 14 | ⬜ Higher than global average |

A foreign brand will earn my trust if it … Global top 6 of 13		Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea
Creates good jobs in my country	49	56	53	59	55	55	50	53	43	47	64	23	53	50	28	40
Follows **my country's laws**	47	53	49	51	39	55	40	54	41	46	58	35	52	55	39	46
Works with **local suppliers**	44	48	40	53	52	51	45	49	34	43	58	29	51	52	23	31
Adapts products to **my culture**	36	30	25	43	41	25	29	29	37	43	45	29	49	45	38	47
Respects **our government policies**	33	37	34	40	37	20	25	32	36	41	40	37	43	55	14	31
Solves **our societal challenges**	31	34	29	35	29	24	23	30	29	35	47	27	44	36	20	28

Trust KPIs Across Countries

Percent who say

I'm more likely to do this on behalf of a brand I fully trust vs one I do not

	Global 14	Brazil	Canada	China	France	Germany	India	Indonesia*	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	UK	U.S.
Purchase (net) *Buy new products* *Buy it even if it's more expensive*	63	70	60	57	62	60	76	72	52	66	60	73	57	68	59	61
Stay loyal (net) *Do not shop around for other brands* *Even if it makes a mistake* *Even if others accuse it of wrongdoing*	55	50	54	42	68	64	67	61	26	61	55	65	34	62	55	62
Advocate *Recommend the fully trusted brand* *to other people*	53	66	49	42	50	48	62	61	33	59	49	70	43	61	50	54

2024 Edelman Trust Barometer Special Report: Brands and Politics. TRUST_KPI. What are you more likely to do on behalf of a brand that you fully trust versus one that you DO NOT fully trust? Pick all that apply. Question asked of half the sample. General population, 14-mkt avg. "Purchase" is a net of attributes 5 and 9. "Stay loyal" is a net of attributes 2, 10, and 12.

Technical Appendix

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Sample Size, Quotas and Margin of Error

Country	Weighed Sample Size[1]	Unweighted Sample Size	Margin of Error – Total Sample[2]	Margin of Error – Half Sample[2]	Quotas Set On[3]
Global 14[5]	14,000	13,957	+/- 1.1 percentage points total sample	+/- 1.5 percentage points half sample	Quotas set at the market level
Brazil	1,000	1,001			
Canada	1,000	1,000			
China[4]	1,000	1,000			
France	1,000	1,001			
Germany	1,000	1,001	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	
India	1,000	1,001			
Indonesia	1,000	1,000			
Japan	1,000	1,000			Age, Gender, Region
Mexico	1,000	1,000			
Saudi Arabia	1,000	955	+/- 4.2 pct pts. total sample	+/- 5.9 pct pts. total sample	
S. Africa	1,000	998			
S. Korea	1,000	1,002			
UAE	1,000	997	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	
UK	1,000	1,001			
U.S.	1,000	1,001			

1. Data reported on slides is weighted to the same total base size to ensure each market has an equal effect on the global total. Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.
2. Margin of error is calculated on the unweighted sample sizes collected, at the 99% confidence level.
3. There were additional quotas on ethnicity in the UK and U.S., and on nationality in the UAE.
4. All data collected in China is from the mainland. Regions of Greater China were not surveyed.
5. Indonesia is excluded from the Global average. They will be included once they've been in the survey for two consecutive years and meet standards for inclusion, such as consistent ability to achieve quota targets and sample composition year-over-year.

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Countries Included in the Various Global Averages

15 countries surveyed	Global 14 average	Global 13 Excludes China	Global 11 Excludes China, Saudi Arabia, UAE	Global 8
	Used for current year averages and tracking to 2021, 2022, or 2023	Used for current year averages; excludes sensitive countries[1]	Used for current year averages; excludes sensitive countries[1]	Used for current year averages and tracking to Nov 2020
Brazil	Brazil	Brazil	Brazil	Brazil
Canada	Canada	Canada	Canada	Canada
China	China	----	----	----
France	France	France	France	France
Germany	Germany	Germany	Germany	Germany
India	India	India	India	India
Indonesia	----	----	----	----
Japan	Japan	Japan	Japan	Japan
Mexico	Mexico	Mexico	Mexico	----
Saudi Arabia	Saudi Arabia	Saudi Arabia	----	----
S. Africa	S. Africa	S. Africa	S. Africa	----
S. Korea	S. Korea	S. Korea	S. Korea	----
UAE	UAE	UAE	----	----
UK	UK	UK	UK	UK
U.S.	U.S.	U.S.	U.S.	U.S.

1. Because some of the content we ask is deemed politically or culturally sensitive there are several countries where we take special precautions in order to avoid putting our respondents, or ourselves, in a position to break any local laws. We work closely with our sample partner and its legal team to identify which questions, and in what countries, we should refrain from asking. Certain data included in this report was not collected in China and is indicated in the global average note of relevant slides. Saudi Arabia and the UAE were also excluded from a subset of questions or attributes and those instances are noted in the footnote of relevant slides.

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Survey Languages Used and Internet Penetration by Country

	Languages	Internet Penetration*
Global	-	-
Brazil	Portuguese	81%
Canada	Localized English, Canadian French	93%
China	Simplified Chinese	76%
France	French	85%
Germany	German	92%
India	Localized English	46%
Indonesia	Indonesian	66%

	Languages	Internet Penetration*
Japan	Japanese	83%
Mexico	Localized Spanish	76%
Saudi Arabia	Localized English, Arabic	100%
S. Africa	Localized English, Afrikaans	72%
S. Korea	Korean	97%
UAE	Localized English, Arabic	100%
UK	Localized English	97%
U.S.	English, Localized Spanish	92%

**Data source: Individuals using the Internet (% of population) | Data (worldbank.org) as of June 11, 2024
Due to disproportionate access to internet in countries with lower internet penetration, the online sample in those countries tends to skew younger, urban, and more affluent.

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HOW WE CALCULATED POLITICALLY DRIVEN BUYERS

Respondents were asked a series of questions regarding the role their political beliefs played in their brand purchasing decisions. The Politically Driven Buyer (PDB) scale was created by averaging respondents' answers to the three 9-point agree/disagree scale items, shown in the table to the right.

- Nonpolitically driven buyers were those that scored between 1 – 4.99 on the PDB scale, meaning on average they disagreed with these statements.

- Respondents who scored between 5.00 – 9.00 on the PDB scale were classified as politically driven buyers, meaning on average they saw themselves reflected at least to some extent in these statements

Respondents were asked:

Please indicate how much you agree or disagree with the following statements

1.	I have stopped buying one brand and started buying another because I liked the politics of one more than the other
2.	I have strong opinions about many societal and political issues. The brands I choose to buy and not buy are one important way I express those opinions.
3.	I have stopped buying a brand solely because it remained silent on a controversial societal or political issue that I believed it had an obligation to publicly address

Full Question Text

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Full Text For Answer Choices Abbreviated

Politically Driven Buying: 6 in 10 Buy Brands to Express Their Politics

BDB_Q17: Please indicate how much you agree or disagree with the following statements.

Shortened	Full
I have switched brands over politics	I have stopped buying one brand and started buying another because I liked the politics of one more than the other
My brand choices express my political opinions	I have strong opinions about many societal and political issues. The brands I choose to buy and not buy are one important way I express those opinions.
I have boycotted a brand because it stayed silent on a political issue	I have stopped buying a brand solely because it remained silent on a controversial societal or political issue that I believed it had an obligation to publicly address

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Full Text For Answer Choices Abbreviated

Brand Nationalism: Israel-Hamas Conflict Sparks Boycotts

BRD_OPIN1: Please indicate how much you agree or disagree with the following statements.

Shortened	Full
I am boycotting brands that support a side on the Israel-Hamas conflict	I am boycotting brands that have expressed support for one side over another in the current conflict between Israel and Hamas
I am buying my country's brands instead of foreign brands more often today than I was a year ago	I am buying my country's brands instead of foreign brands more often today than I was a year ago

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Full Text For Answer Choices Abbreviated

Need for Trust Expands: Trust in Parent Company Rises as Critical Purchase Criteria

TRUST_IMP: When it comes to brands in general 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 nice to have.

Shortened	Full
Good value for the money	It offers good value for the money
Offers the best quality	It offers the best quality
I trust it	I trust it
High quality customer service	It offers high quality customer service
Has a good reputation	It has a good reputation
Convenient to find, buy, and use	It is convenient to find, buy and use
I love it	I love it
I trust the company that owns the brand	I trust the corporation that owns the brand
Has a small climate impact	It has as small a negative impact on the environment as possible
Treats its employees well	It treats its employees well
Headquartered in my country	It is a domestic brand headquartered in my country
Reflects me as a person	It is a good fit with who I am as a person
Has a clear mission	It has a mission or purpose in the world beyond making a profit

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Full Text For Answer Choices Abbreviated

Everyday Brand Actions Seen as Political

WHAT_POL: Which of the following brand actions, if any, do you consider to be political or politically motivated?

Shortened	Full
Take a stand on issues	Publicly expressing an opinion or taking a stand on a contentious social issue of any kind
Encourage voting	Encouraging people to vote in elections
Hire influencers with political opinions	Partnering on an ad campaign with an influencer, celebrity or athlete who has at any time expressed a political opinion, even if their political opinion is not relevant to the campaign itself
Use social platforms that host extremists	Being active on social media platforms that also support or host extremist views
Work on regulations	Working with the government to shape and develop effective regulations for their industry
Recruit diverse employees	Having a hiring strategy that aims to attract, source, and retain employees that come from a range of diverse religious, gender, ethnic, or socioeconomic backgrounds
Advertise near political news	Placing advertisements for their brand near or next to news articles about political topics
Reduce climate impacts	Having a strategy in place to reduce the extent to which its operations, products, and services are contributing to climate change
Sponsor the Olympics	Being a sponsor of the Olympic Games

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Full Text For Answer Choices Abbreviated

Silence Is Political: When Brands Say Nothing, 1 in 2 Assume the Worst

BRD_SILENT: If a brand does not mention in its advertising or public communications the things it is doing to address issues like climate change, increasing diversity within its organization, equity and racial justice, or retraining workers who lose their jobs due to automation, which of the following are you most likely to assume is true?

Shortened	Full
If a brand doesn't communicate its actions to address societal issues, I assume it is doing nothing or hiding something (net)	The brand is ignoring these issues and so has nothing to talk about
	The brand has something negative to hide regarding what it is doing in these areas and is trying to avoid the topic

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Full Text For Answer Choices Abbreviated

Brands Expected To Do More, Not Less

BRD_BND: Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more.

Shortened	Full
Climate	Taking action to reduce its climate impacts
Fair pay	Taking steps to address economic inequality by ensuring their workers and employees have fair pay
Retraining	Doing the workforce reskilling and retraining necessary to keep people employable whose jobs are being eliminated or greatly altered by automation and artificial intelligence
Misinformation	Controlling the malicious spreading of misleading and false information and ensuring the availability of trustworthy information
Public health	Encouraging people to engage in behaviors that would improve public health outcomes, such as receiving vaccinations
Diversity	Having a marketing strategy that aims to ensure that people from diverse backgrounds are consistently represented
Voter participation	Encouraging people to vote in elections
Weigh in on politics	Weighing in on political issues and debates

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Full Text For Answer Choices Abbreviated

Anchor Brand Action in Shared Values

VAL_MATCH_IMP: . Please indicate for which of the following brand categories a shared set of values between you and the brand is an important purchase consideration.

Shortened	Full
Food and beverage (avg)	Food and beverage Food brands that I use everyday Beverage brands that I use everyday

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Full Text For Answer Choices Abbreviated

Avoid Contextual Naïveté:
Map Your Brand's Permission to Act Against the Local Cultural Context

BRD_BND: Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more.

Shortened	Full
Climate	Taking action to reduce its climate impacts
Fair pay	Taking steps to address economic inequality by ensuring their workers and employees have fair pay
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Weigh in on politics	Weighing in on political issues and debates

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Full Text For Answer Choices Abbreviated

Expert and Everyday Voices Most Credible; Ensure Brand Ambassadors Live Your Values

ABILITY_SPK_A: If a brand were to use each of the following as their spokesperson/brand ambassador, how credible or believable would you consider them to be?

Shortened	Full
Person like myself	A person like yourself who regularly uses the brand
Scientist, academic expert	A scientist or academic expert
Brand employee	A regular employee of the brand
Brand CEO	The CEO of the company that owns the brand
Celebrity, sports star	A celebrity or sports star speaking as themselves

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Full Text For Answer Choices Abbreviated

Brand Values are Made and Broken in the Media;
Don't Rely on Advertising Alone to Convince Me of Your Impact

BRD_CHNL: Among the sources of information listed below, select the one that best fits each of the following descriptions.

Shortened	Full
The news media	The news media
Search	Search or search engines
My personal experiences	My own direct, personal experiences or interactions with the brand or product
Online reviews	Customer/user reviews posted online
Advertising	The brand's advertising
Direct communication	A direct communication (e.g., post, blog, email, IM, text) from the brand itself
Special interest media	Special interest media (e.g., media that focuses on things like hobbies, specific topics like technology or automobiles, or lifestyle topics like home or pets or travel)
Influencers	An influencer that I follow
Someone on my social media	Someone in my social media network or in an online community I am a member of

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Full Text For Answer Choices Abbreviated

For Gen Z, Social Media is the Battleground for Trust

CON_HEAR: How did you first learn about the [PIPE IN ISSUE FROM WHY_TRU_LOSS (ONLY BOLDED PORTION)]?

Shortened	Full
Social media	I saw someone talking or posting about it on social media
My personal experience	I came across it myself
In the news	I read about it in a newspaper or saw it on the news
Family and friends	I heard about it from family or friends
Politicians	A politician brought it to my attention
Consumer protection group	A consumer protection group made a statement about it
Religious leaders	A religious leader brought it to my attention
Brand competitors	The brand's competitors were talking about it

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Full Text For Answer Choices Abbreviated

Consumers Will Protect the Brands They Trust

TRUST_KPI: What are you more likely to do on behalf of a brand that you fully trust versus one that you DO NOT fully trust?

Shortened	Full
Buy new products	Buy new products or services the fully trusted brand introduces
But it even if it's more expensive	Buy the fully trusted brand even if it is not as cheap as some of my other options
Do not shop around for other brands	Stay loyal to the fully trusted brand, and not be actively shopping around for another brand that I might like better
Even if it makes a mistake	Stay loyal to the fully trusted brand even if it makes a mistake or something goes wrong
Even if others accuse it of wrongdoing	Stay loyal to the fully trusted brand even if I hear others accuse it of wrongdoing

Slide 3 Image Credits

1	**2**
3	
4	**5**

1. **A woman casts her ballot to vote in India's general election**. *Idrees Mohammed/AFP via Getty Images*

2. **A supporter holds a banner with the image of Mexico's presidential candidate for the ruling Morena party, Claudia Sheinbaum, at her campaign rally in Mexico City.** *Pedro Pardo/AFP via Getty Images*

3. **Free Palestine' graffiti is daubed on a subway stop as a pro-Israel rally is held outside of Columbia University in New York**. Adam Gray via Getty Images

4. **Climate activists from "Reclaim The Future" protest outside of the Swedish parliament in Stockholm, Sweden.** *Michael Campanella/Getty Images*

5. **TikTok's booth at an exhibition in Hangzhou, Zhejiang province, China**. CFOTO/Future Publishing via Getty Images