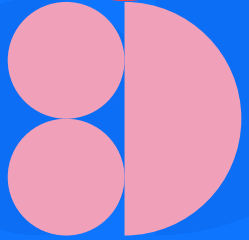
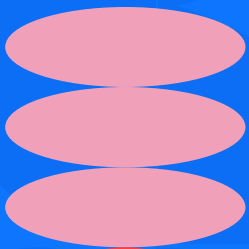


**2023
Edelman
Trust
Barometer**



The Collapse of the Purchase Funnel

↘ **Edelman** Trust Institute



2023 Edelman Trust Barometer Special Report:
The Collapse of the Purchase Funnel

Methodology

Fieldwork conducted: May 1 – May 12, 2023

14

Countries

13,802

Respondents

1,000_{+/-}

Respondents per country**

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

Statistical significance



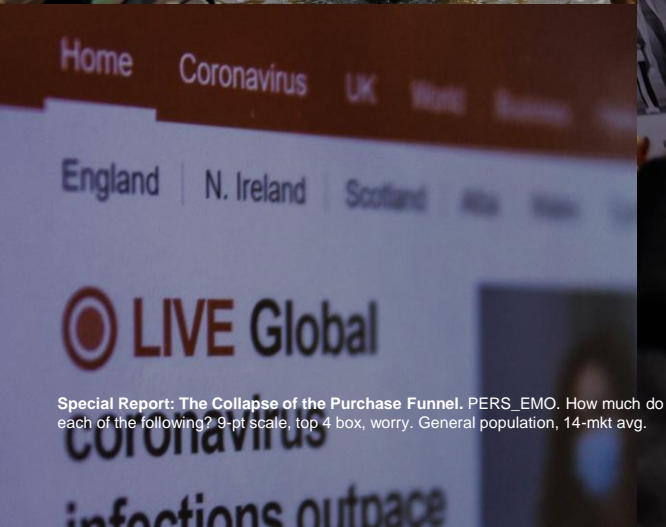
Indicates a mathematically significant change in data that can be attributed to a profound change rather than chance.

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

**The sample size varies by country from 930 to 1,004.
 14-market global data margin of error: General population +/- 1.1 percentage points (n=13,802)
 Country-specific data margin of error: General population +/- 4.1 to 4.2 percentage points (varies by country based on sample size, n=930 to n=1,004)
 Margin of error is calculated at the 99% confidence level



Personal and Societal Threats Heighten Consumer Vulnerability



70%
Climate change

67%
Inflation

67%
Global conflict

58%
Misinformation

59%
Polarization

58%
Rights and freedoms

64%
My health

Special Report: The Collapse of the Purchase Funnel. PERS_EMO. How much do you worry about each of the following? 9-pt scale, top 4 box, worry. General population, 14-mkt avg.



Consumer Vulnerability Changes the Business of Brands



We Place More Value on Brands That Address Our Vulnerabilities

GLOBAL 14



Significant change

Which type of brand is more attractive?

Brands that increase my sense of **safety and security**

73%

+9 pts
Change, June 2022 to June 2023

or

Brands that spark my sense of **adventure and thrill-seeking**

27%

Ages 18-26

27-42

43-58

59+



Since Last Year, We Are Putting Brands Under More Scrutiny

Percent who say

GLOBAL 14

Given events of the past year,
I am now ...

More price conscious

Doing **more** research before I buy

Making **fewer** impulse purchases

68%

58%

58%



Since Last Year, We Are More Concerned About a Brand's Impact

Percent who say

GLOBAL 14

Given events of the past year,
I am now *more likely to consider* a product's ...

Health impact

64%

Environmental impact

55%



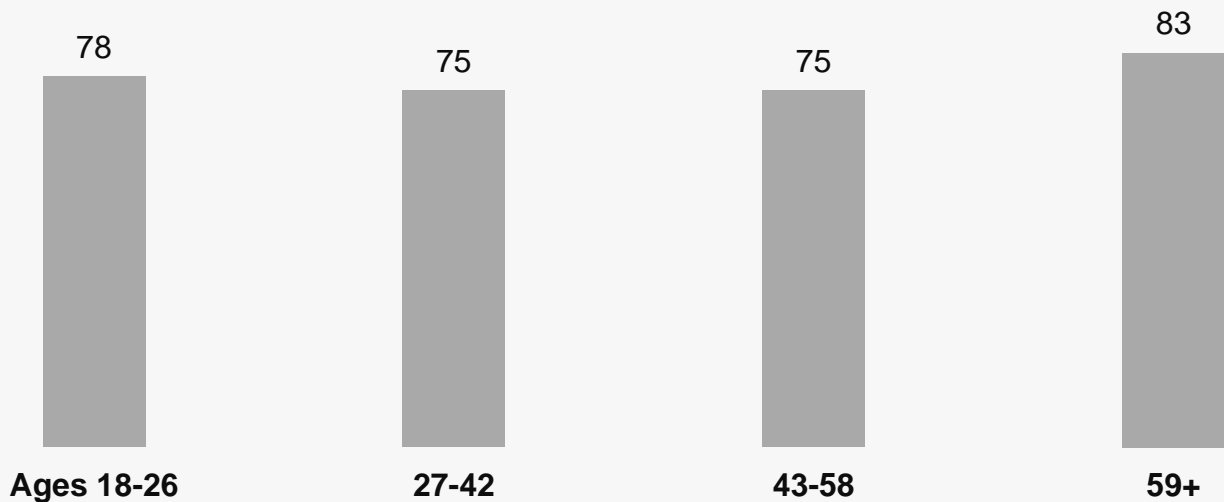
We Consider the Geopolitical Impact of Buying Foreign Brands

Percent who say

GLOBAL 14

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

77%



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. WILL_BUY. Using the scale below, please indicate your attitude towards buying brands from companies headquartered in each of the following countries. 4-point scale; codes 3-4, I will not buy or I avoid buying from brands headquartered in this country. Question asked of half of the sample. General population, 14-mkt avg., and by age. Data shown is a net of all 13 foreign markets shown to the respondent.



When Consumers Feel Vulnerable, the Need to Trust Brands Grows More Urgent

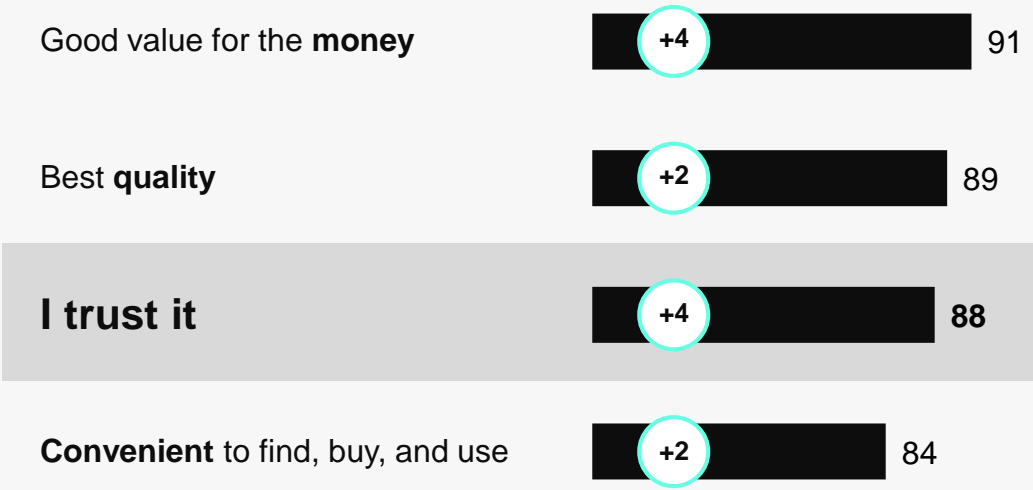
Percent who say

GLOBAL 14 - 0 + Change, June 2022 to June 2023 ○ Significant change

71%

It is **more important** to trust the brands I buy or use today **than in the past**

This is an **important consideration** when I buy a brand



Trust remains top three buying consideration

2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. IMP_TRU. Is it more important to you to be able to trust the brands you buy or use today than it was in the past? 3-point scale; code 1, yes. Question asked of half of the sample. 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 a nice to have. 3-point scale; codes 1-2, critical deal breaker or important. General population, 14-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



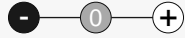


Gen Z Transforms How and Why We Buy



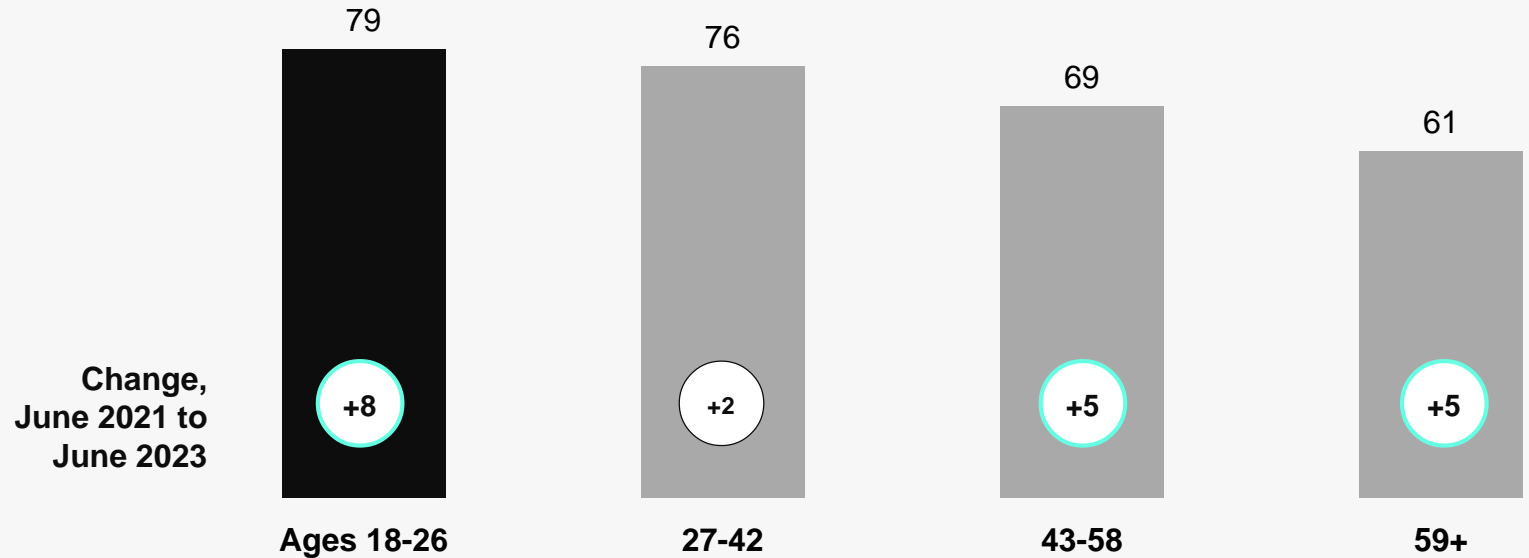
Gen Z Raises the Stakes for Brand Trust

Percent who say

GLOBAL 14  Significant change

It is **more important** to trust the brands I buy or use today **than in the past**

Highest need for brand trust among Gen Z

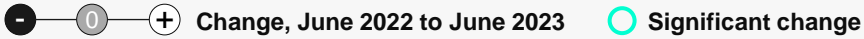



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. IMP_TRU. Is it more important to you to be able to trust the brands you buy or use today than it was in the past? 3-point scale; code 1, yes. Question asked of half of the sample. General population, 14-mkt avg., by age. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



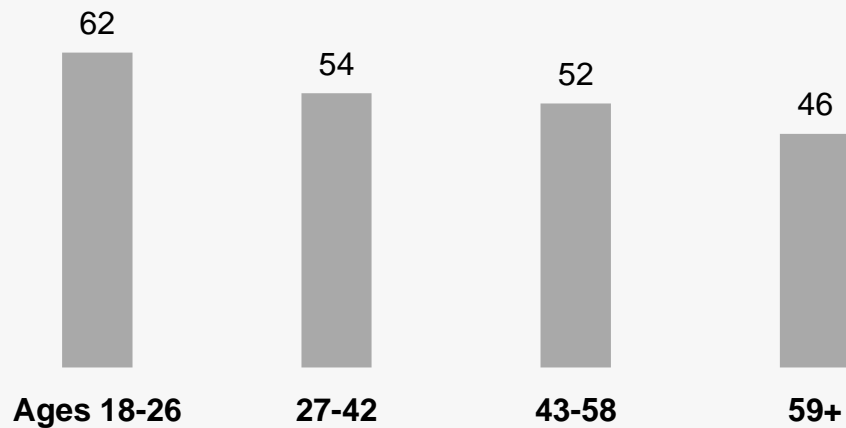
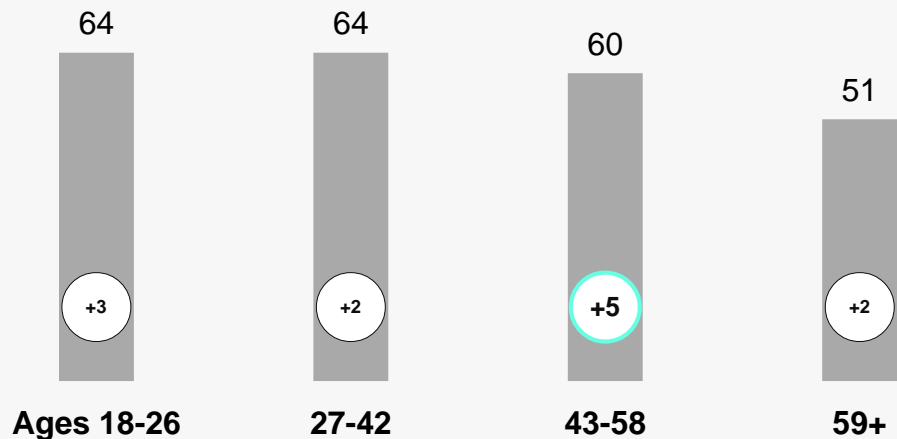
Gen Z Heightens Expectations for Brands to Show Their Values

Percent who say

GLOBAL 14  Change, June 2022 to June 2023  Significant change

Brands should **make it easier to see their values** when I am about to make a purchase

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



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. Q17. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half of the sample. 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? 3-point scale; codes 2-3, I assume the brand is doing nothing or has something to hide. Question asked of half of the sample. General population, 14-mkt avg., and by age. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Gen Z Transforms How Consumers Buy Products and Interact With Brands

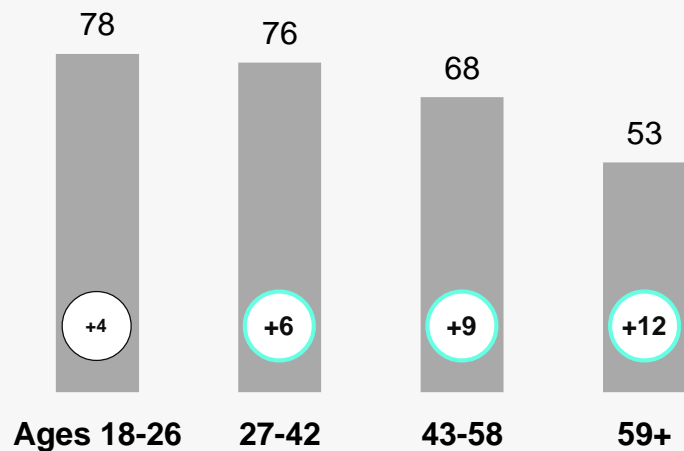
Percent who say

GLOBAL 14 ● ○ + ○ Significant change

Teenagers and college-aged people influence where and how I shop

68%

+7 pts
Change, June 2022 to June 2023



Gen Z influences ...	
How I buy online and through apps	67
How I give brands negative feedback	62
How and where I talk about brands	62
How I connect with brands on social	57

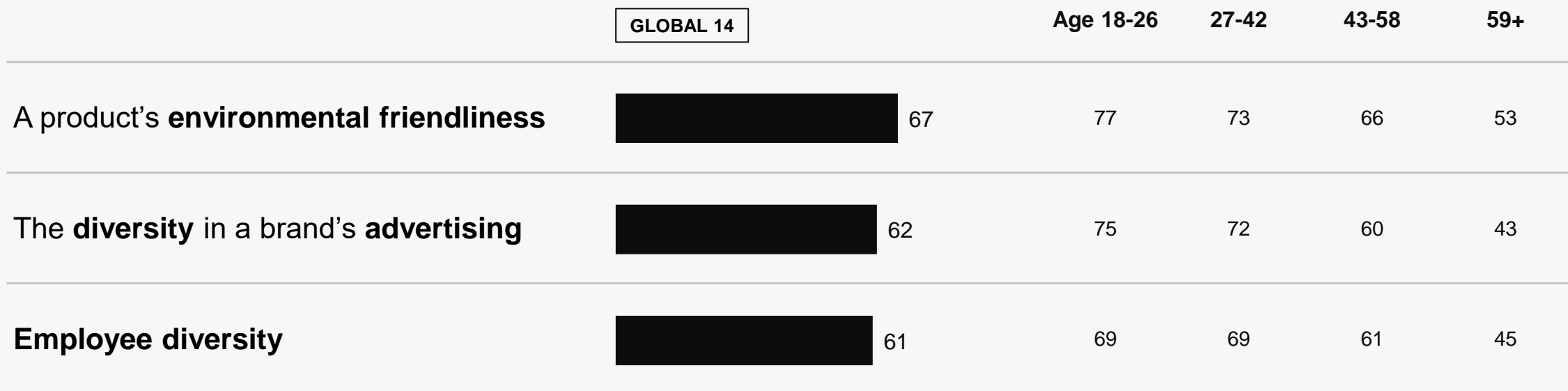
2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? 5-point scale; codes 3-5, moderate or more influence. Question asked of half of the sample. General population, 14-mkt avg., and by age. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Gen Z Transforms Consumer Expectations for How Brands Do Business

Percent who say

Teenagers and college-aged people **influence my expectations for ...**



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? 5-point scale; codes 3-5, moderate or more influence. Question asked of half of the sample. General population, 14-mkt avg., and by age.

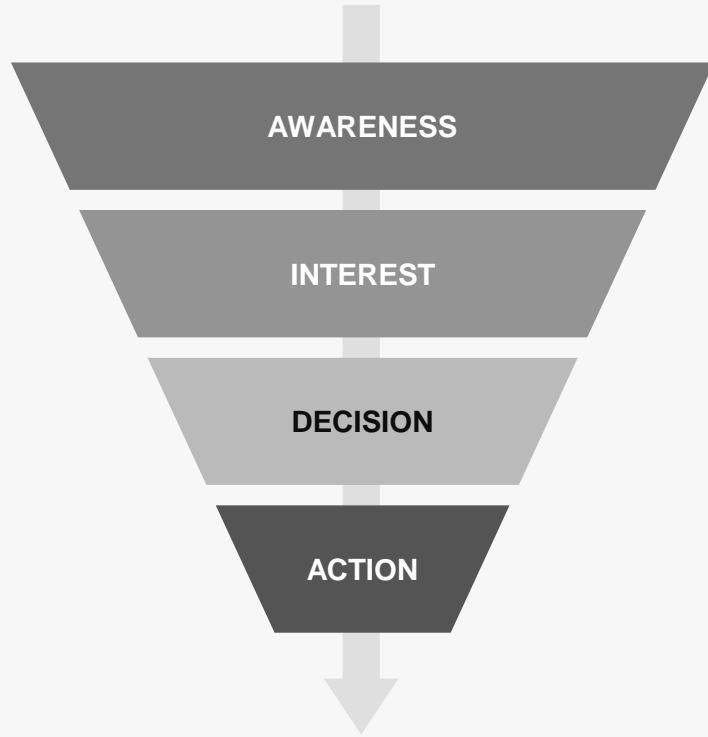




The Collapse of the Purchase Funnel



Today's Buying Relationship Is Too Dynamic for a Linear Funnel



The funnel is broken because ...

Purchase is no longer just the end point

Consumers don't behave in sequential stages

It does not account for an ongoing relationship

It is focused predominantly on transaction



Purchase is Not the Endpoint: For Many, It's the Starting Point

Percent who say

GLOBAL 14

I uncover things that attract me and make me loyal to a brand **after** my first purchase

78%

I do most of my brand research **after** I buy (avg)

50%

Among those who actively research important attributes of the brands they buy

It's Not a Series of Stages: Consumers Want Ongoing Engagement With Brands

Percent who say

GLOBAL 14

I interact directly with brands,
beyond using their products or service



Because it gives me opportunities to... (top 3 of 10)	
1	Evaluate a brand beyond its product
2	Save money with discounts
3	Gather information and learn things

79%

Consume brand content,
participate in brand activities,
connect on social media,
share feedback

2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. DIRECT_INT_OFT. Typically, how often do you interact directly, either in person or virtually, with brands in ways beyond simply using their products or working with their customer service representatives? 7-point scale; codes 2-7, occasionally or more. Question asked of half of the sample. INT_PUR. Why do you engage in these direct interactions with brands? Pick all that apply. Question asked of those who directly interact with brands (DIRECT_INT_OFT/2-7). General population, 14-mkt avg.



Brand Engagement Builds Trust in the Product and the Brand

Among those who directly interact with brands, percent who say

GLOBAL 14

My brand interactions show me if I can **trust the brand to be ...**

Competent
performs to my expectations

Ethical
*treats customers and employees fairly,
attempts to do good in the world*

Relevant
fits my lifestyle and identity

70%

60%

59%



Trust Drives Growth: Consumers Reward Brands They Trust With Purchase, Loyalty, and Advocacy

Percent who say

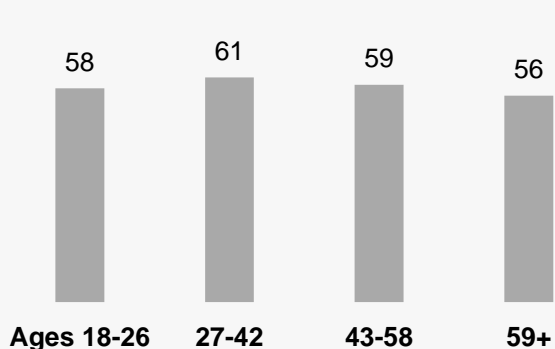
GLOBAL 14

When I trust a brand, I am more likely to ...

Purchase (net)

*Buy new products the brand introduces
Buy the brand even if it is not as cheap*

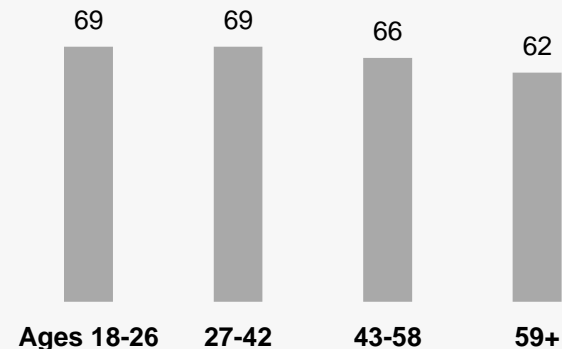
59%



Stay loyal and advocate (net)

*Stay loyal and/or stick with it despite a mistake
Recommend it to others*

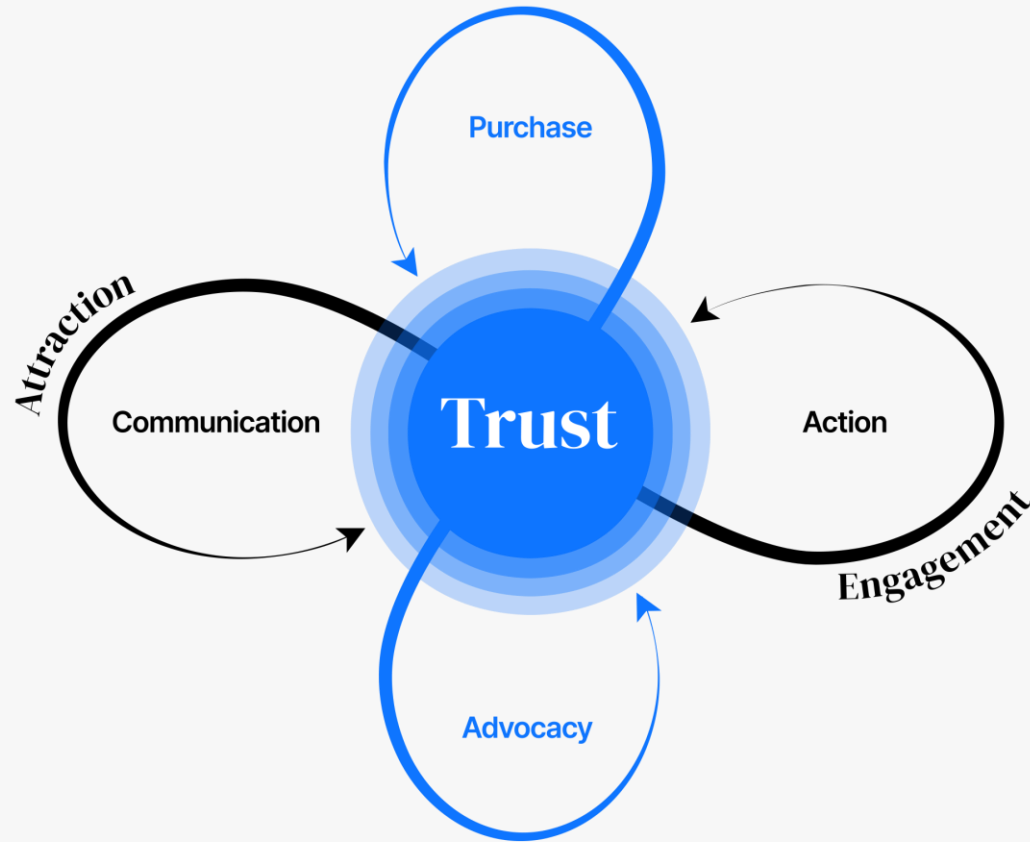
67%



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. 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 of the sample. General population, 14-mkt avg., and by age. "Purchase" is a net of items 5 and 9. "Stay loyal and advocate" is a net of items 1, 2, and 10.



The New Growth Engine for Brands: The Trust Loop Fuels an Ongoing Consumer Relationship



1. Purchase is not the end point; often, it's the starting point
2. Ongoing engagement builds attraction, which leads to further engagement
3. Brand action, reinforced by communications, builds trust
4. Trust drives growth, leading to greater purchase, advocacy, and loyalty





The New Paradigm for Building Brands



Consumers More Likely to Buy Brands That Take Action

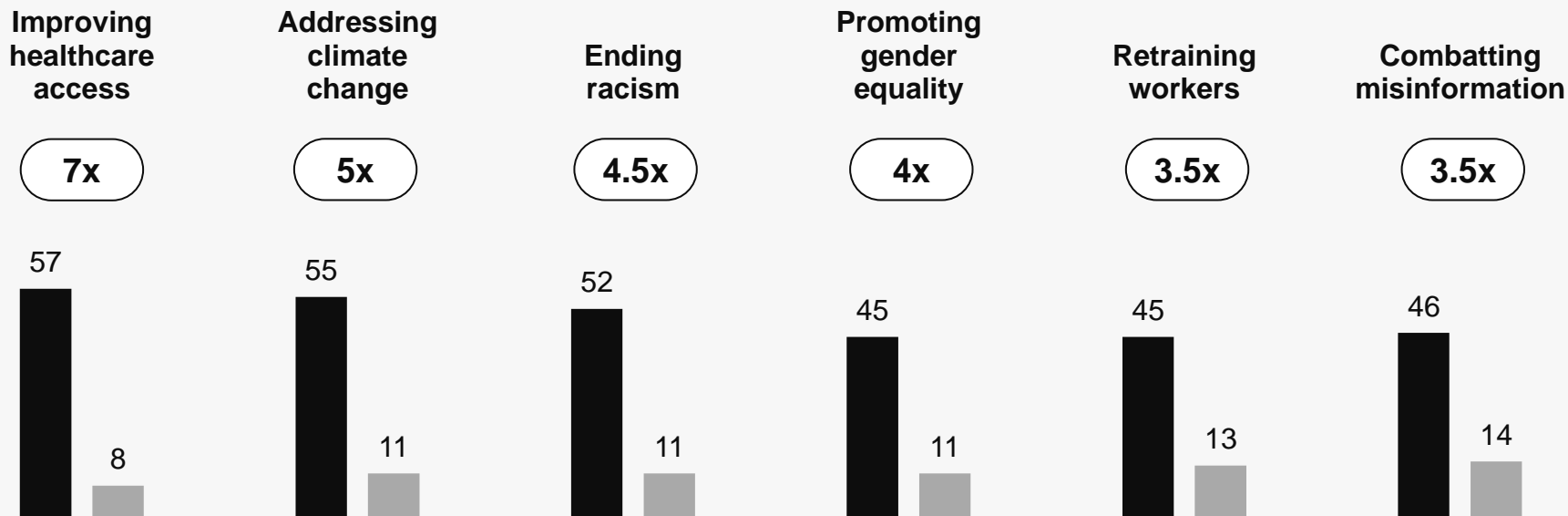
Percent who say

GLOBAL 14

I am more or less likely to buy brands that commit to each issue

More likely Less likely

Multiplier
more likely vs. less likely to buy a brand



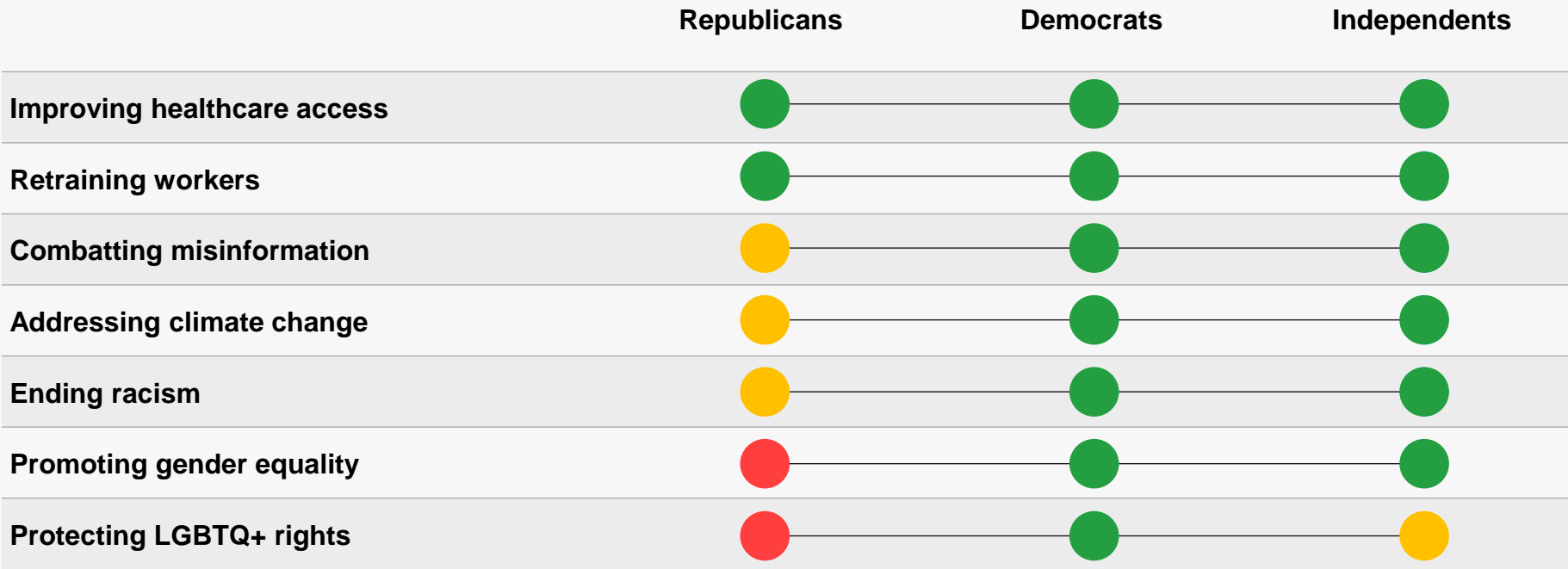
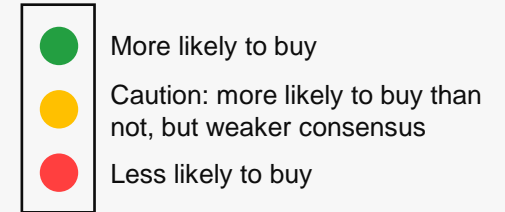
2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? 4-point scale; codes 1-2, less likely; code 4, more likely. Question asked of half of the sample. General population, 14-mkt avg. Multipliers are rounded to the nearest 0.5.



Even in a Polarized Culture, Bi-partisan Consensus for Brands to Act

Percent who say, in the U.S.

I am more or less likely to buy brands that commit to each issue



Consensus for brands to take action on healthcare and retraining



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? 4-point scale, codes 1-2, less likely; code 4, more likely. Question asked of half of the sample. General population, U.S., by political affiliation. Graphic based on multiplier; multiplier calculated as more likely / less likely. For full data behind graphic, please see supplemental appendix.

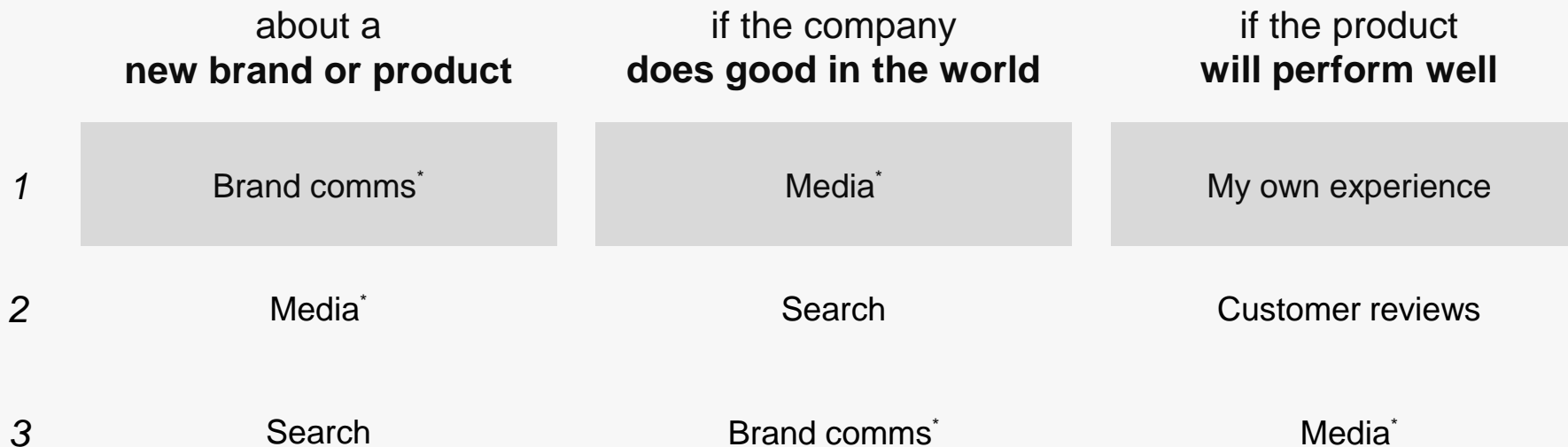


Media, Brand Communications, and Personal Experience Top Sources for Building Awareness and Brand Trust

Percent who say

GLOBAL 14

This is the **best source to learn ...**




2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. BRD_CHNL1. Among the sources of information listed below, select the one that best fits each of the following descriptions. Question asked of half of the sample. General population, 14-mkt avg. *Note: "Media" is a net of items 1-2, "the news media" and "special interest media." "Brand comms" is a net of items 3-4, "a direct communication from the brand itself" and "the brand's advertising." Data shown has been rebased to exclude those who selected "don't know."



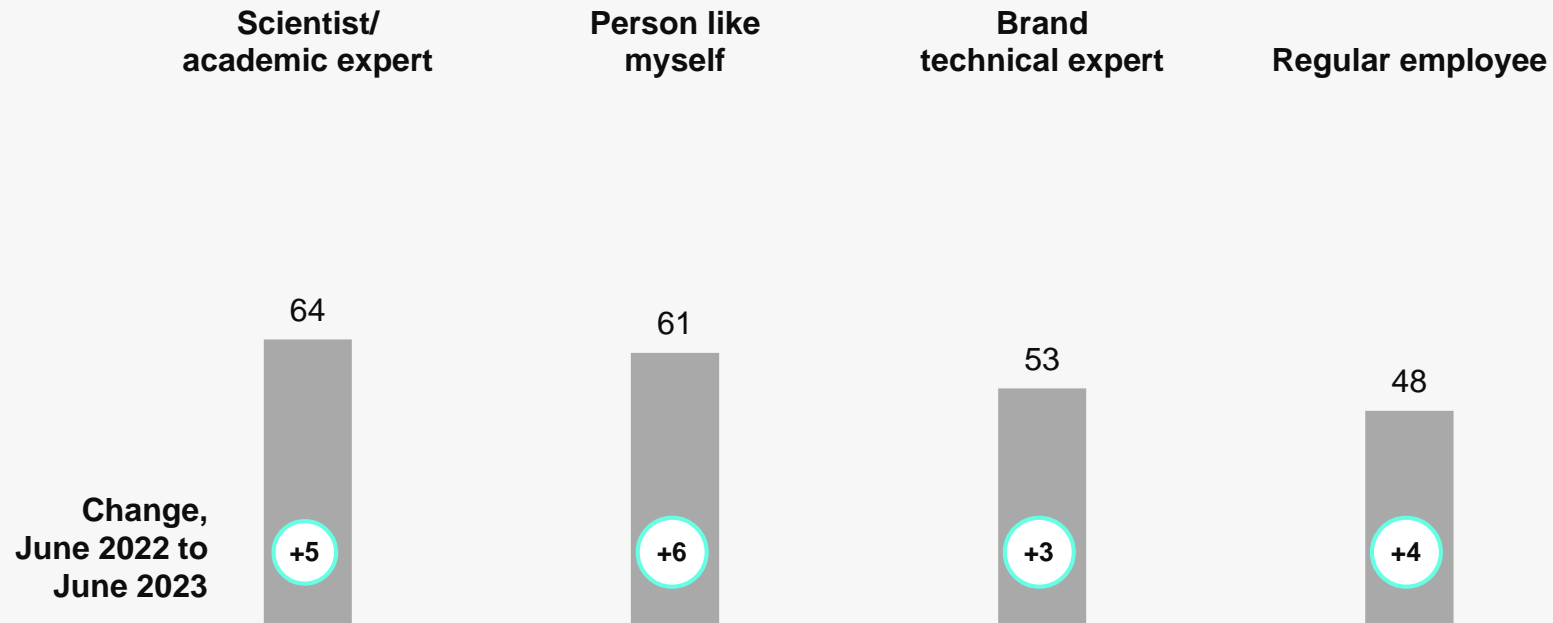
Both Expert and Everyday Voices Make Credible Brand Ambassadors

Percent who say

GLOBAL 14  Significant change

This person would be **credible as a brand spokesperson or ambassador**

(top 4 of 10)



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. 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? 4-point scale; top 2 box, very/extremely credible. Question asked of half of the sample. General population, 14-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



When Brands Lack Relevance or Authenticity, Consumers Disengage

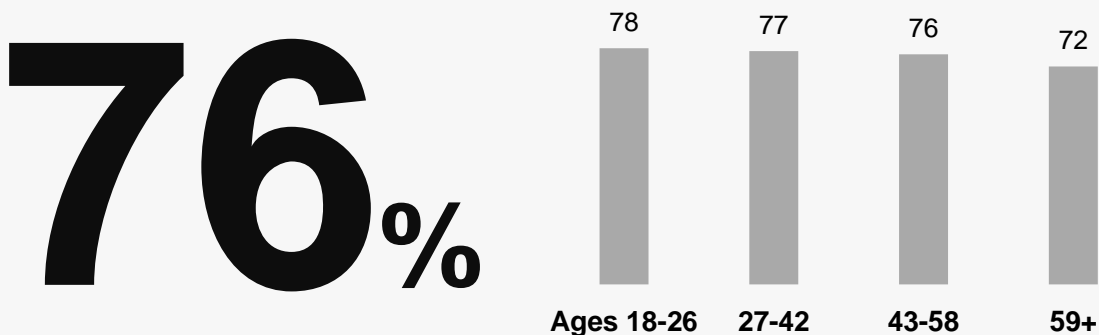
Percent who say

GLOBAL 14

A brand’s attempt to engage with me **often goes wrong because they ...**

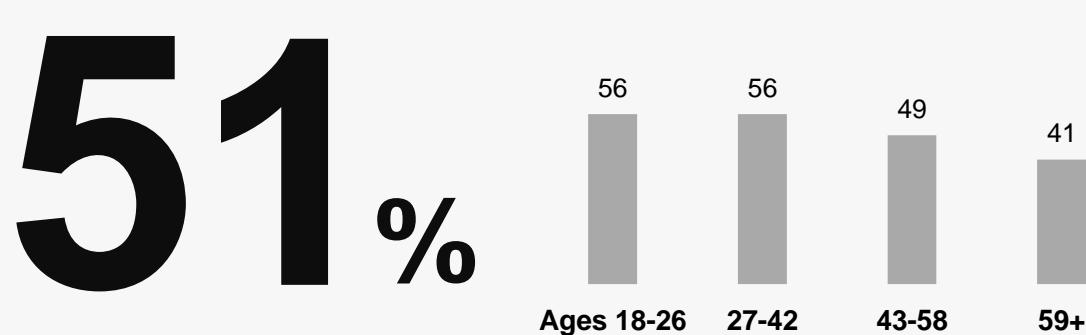
Lack relevance (net)

Their interactions are unwanted, exploitative, intrusive, exclusive



Lack authenticity (net)

Their interactions are uninteresting, inauthentic, out of touch



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. INT_WRG. When a brand's attempt to engage or interact with you goes wrong, what are the most common reasons why? Pick all that apply. Question asked of half of the sample. General population, 14-mkt avg., and by age. "Lack relevance" is a net of items 1, 5-8. "Lack authenticity" is a net of items 2-4.



To Earn Trust With Vulnerable Consumers, Brands Must Show They Will Hold Themselves Accountable

Percent who say

This would be **very/extremely effective** in building or increasing **my trust** in a brand

GLOBAL 14



Accountability more effective trust-builder than emotional connections



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel

1

Move beyond the funnel

Today's consumers want an ongoing relationship with brands, and most consideration happens after the purchase. Build your brand and measurement strategy around the Trust Loop.

2

Work with Z

Gen Z is changing the face of global commerce. They are pragmatic and highly influential. Even if they're not your target, work with them to unlock consumer action at scale.

3

Make trust your growth engine

With trust, brand action fuels consumer action – buying, advocacy and loyalty. Through a reciprocal relationship that builds trust, you can unlock growth.



Appendix: Supplemental Data



We Place More Value on Brands That Address Our Vulnerabilities

Country Findings

GLOBAL 14



Significant change

Which type of brand is more attractive?

Brands that increase my sense of **safety and security**

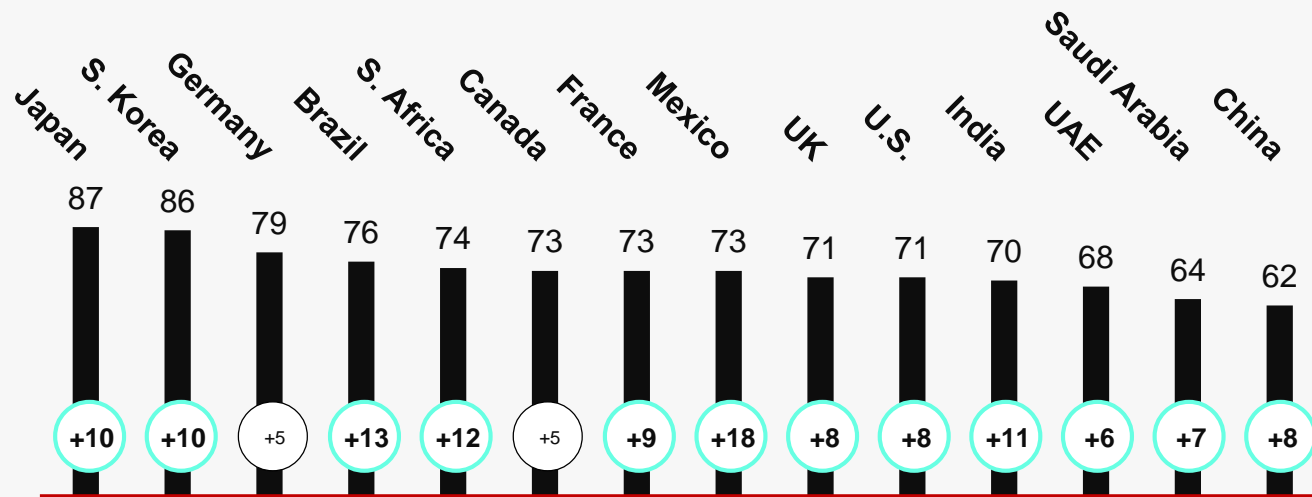
73%

+9 pts
Change, June 2022 to June 2023

or

Brands that spark my sense of **adventure and thrill-seeking**

27%



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. ATTRACT. You are about to see a series of two choices. Please pick the one that better describes the type of brands that you are more attracted to, or that you find more appealing, these days. Question asked of half of the sample. General population, 14-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



We Consider the Geopolitical Impact of Buying Foreign Brands

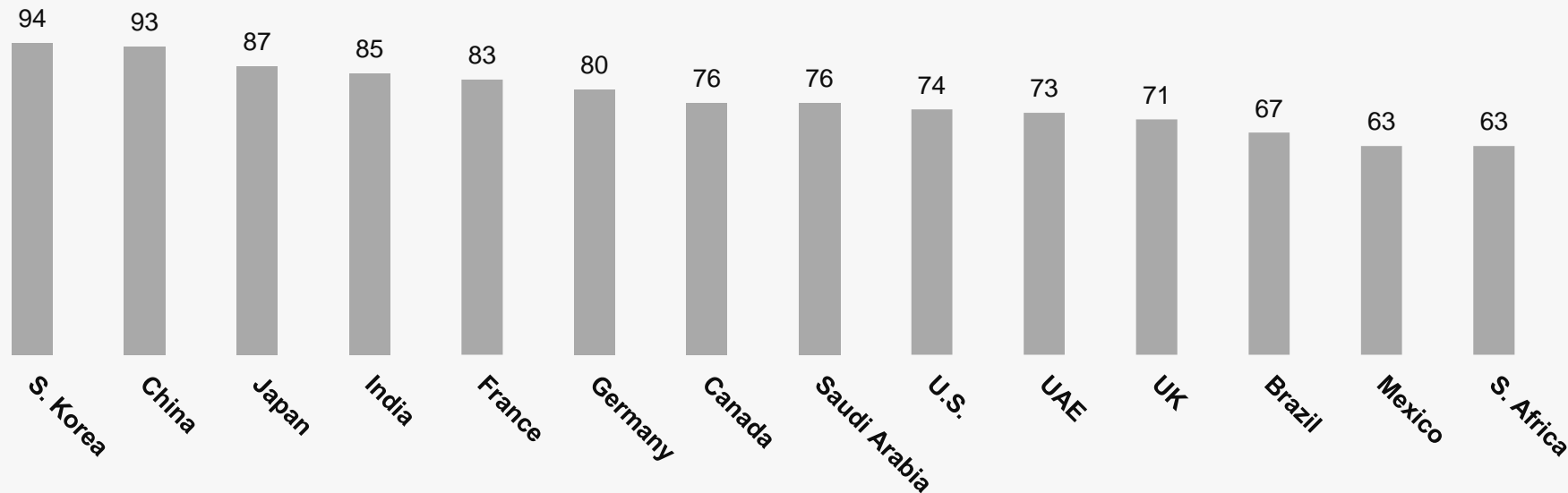
Country Findings

Percent who say

GLOBAL 14

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

77%



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. WILL_BUY. Using the scale below, please indicate your attitude towards buying brands from companies headquartered in each of the following countries. 4-point scale; codes 3-4, I will not buy or I avoid buying from brands headquartered in this country. Question asked of half of the sample. General population, 14-mkt avg. Data shown is a net of all 13 foreign markets shown to the respondent.



When Consumers Feel Vulnerable, the Need to Trust Brands Grows More Urgent

Country Findings

Percent who say

GLOBAL 14 Change, June 2022 to June 2023 Significant change

This is an **important consideration** when I buy a brand

	Global 14		Brazil		Canada		China		France		Germany		India		Japan		Mexico		Saudi Arabia		S. Africa		S. Korea		UAE		U.K.		U.S.	
	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-
It offers good value for the money	91	4	92	2	92	2	90	5	93	5	87	5	90	3	92	10	93	3	88	2	92	1	87	1	88	1	91	1	93	6
It offers the best quality	89	2	93	2	90	1	91	5	89	2	84	2	90	1	82	3	93	3	88	4	90	0	85	-1	90	1	88	0	91	4
I trust it	88	4	88	1	89	3	91	7	86	1	82	4	89	3	92	8	86	1	85	0	87	1	85	3	89	1	88	3	90	7
It is convenient to find, buy and use	84	2	84	4	84	4	87	4	83	2	75	0	84	-1	88	9	86	2	84	-1	84	-1	84	2	86	2	84	0	86	3

2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. 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 a nice to have. 3-point scale; codes 1-2, critical deal breaker or important. General population, 14-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Gen Z Transforms How Consumers Buy Products and Interact With Brands

Country Findings

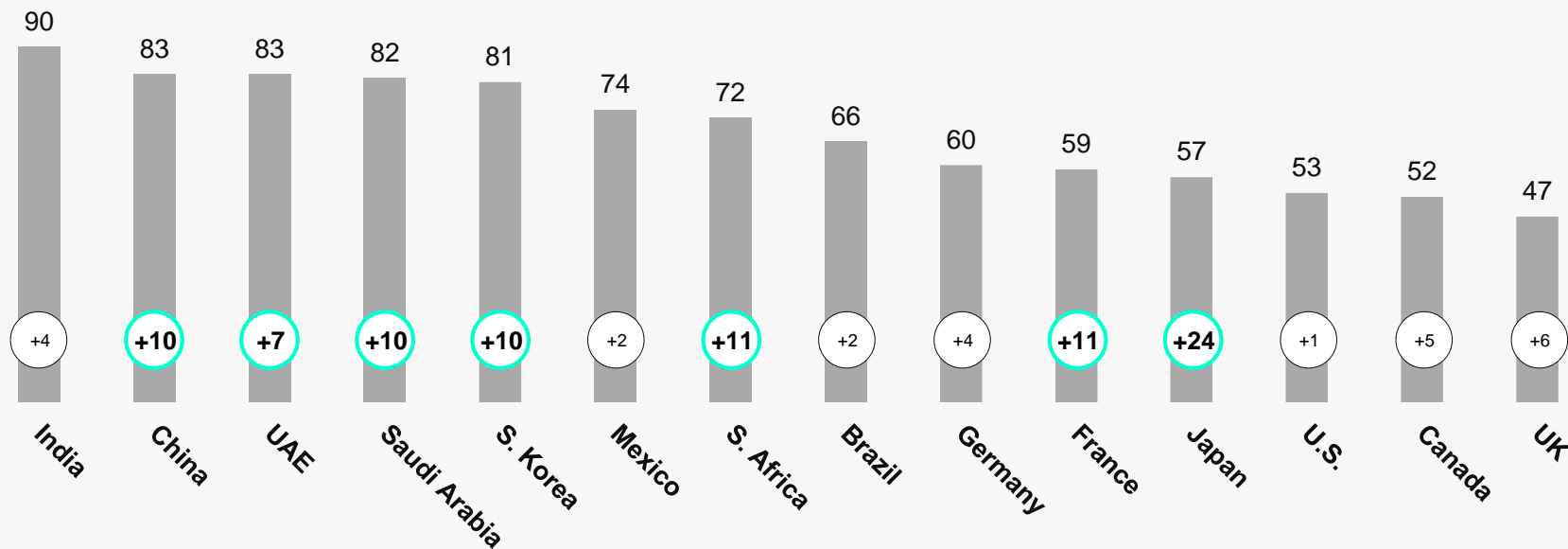
Percent who say

● ○ + Change, June 2022 to June 2023 ○ Significant change

Teenagers and college-aged people influence where and how I shop

68%

▲
+7 pts
 Change, June 2022 to June 2023



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? 5-point scale; codes 3-5, moderate or more influence. Question asked of half of the sample. General population, 14-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Purchase is Not the Endpoint: For Many, It's the Starting Point

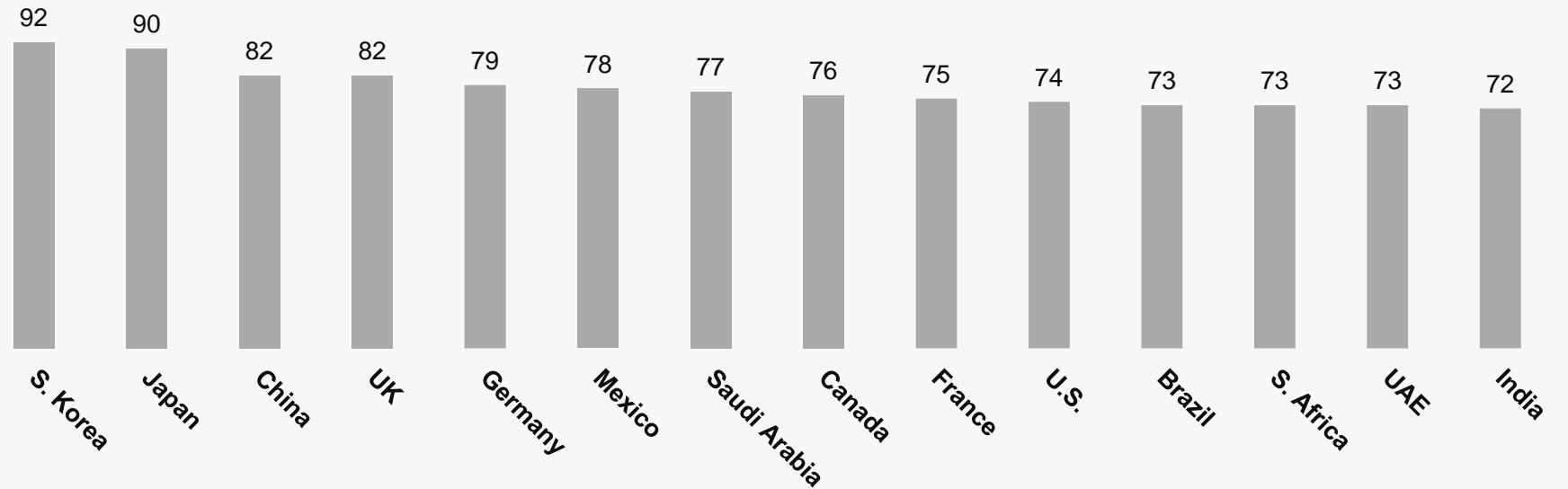
Country Findings

Percent who say

GLOBAL 14

I uncover things that attract me and make me loyal to a brand **after** my first purchase

78%



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. ATT_ARC. Think about the types of things that attract you to a brand and turn you into a loyal, long-term customer. Do you uncover or discover most of those things before you buy the brand for the first time, just after you buy it for the first time and begin using it, or do they tend to come to light slowly over time as you use and buy the brand repeatedly? 3-point scale; code 2, just after I buy it for the first time and start using it, and code 3, slowly over time after repeated purchase and use. Question asked of half of the sample. General population, 14-mkt avg. Data shown is a net of codes 2 and 3. Data has been rebased to exclude those who selected "Don't know."



Even in a Polarized Culture, Bi-partisan Consensus for Brands to Act

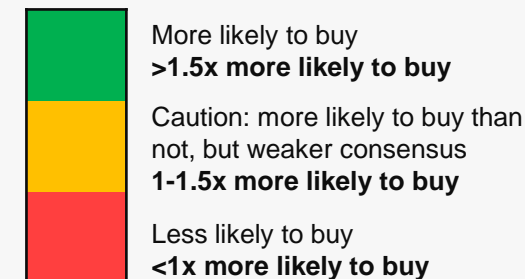
Full Data Table

Percent who say, in the U.S.

I am more or less likely to buy brands that commit to each issue

	Republicans			Democrats			Independents		
	More	Less	Multiplier	More	Less	Multiplier	More	Less	Multiplier
Improving healthcare access	38	10	3.8	68	6	11.3	50	10	5.0
Retraining workers	42	16	2.6	54	8	6.8	42	8	5.3
Combatting misinformation	31	22	1.4	57	7	8.1	44	5	8.8
Addressing climate change	26	18	1.4	67	10	6.7	46	13	3.5
Ending racism	29	23	1.3	66	7	9.4	42	16	2.6
Promoting gender equality	20	22	0.9	60	7	8.6	36	9	4.0
Protecting LGBTQ+ rights	11	41	0.3	49	9	5.4	26	21	1.2

How we determined cut points:



2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel. RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? 4-point scale, codes 1-2, less likely; code 4, more likely. Question asked of half of the sample. General population, U.S., by political affiliation. Graphic based on multiplier; multiplier calculated as more likely / less likely.



To Earn Trust With Vulnerable Consumers, Brands Must Show They Will Hold Themselves Accountable

Country Findings

Percent who say

GLOBAL 14

This would be **very/extremely effective** in building or increasing **my trust** in a brand

	Global 14	Brazil	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	U.K.	U.S.
Owning its mistakes	69	79	70	65	61	66	76	65	68	72	79	65	71	58	65
Transparency about its climate impact, supply chain, employee diversity	63	74	61	60	59	61	74	48	68	65	72	64	67	54	56
Working with government to develop regulations	55	59	53	63	47	48	72	38	57	65	62	45	63	46	50
Being culturally relevant	51	64	40	64	42	35	71	38	54	68	53	52	62	33	39
Inspiring advocacy among people I trust	50	60	41	62	41	39	71	32	56	58	60	48	62	37	40
Developing an emotional connection with me	47	55	38	60	37	36	65	26	54	58	57	46	60	30	39



Appendix: Technical Details



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Sample Size, Quotas and Margin of Error

Market	Weighed Sample Size ¹	Unweighted Sample Size	Margin of Error – Total Sample ²	Margin of Error – Half Sample ²	Quotas Set On
Global 14	14,000	13,802	+/- 1.1 percentage points total sample	+/- 1.6 percentage points half sample	Quotas set at the market level
Brazil	1,000	990	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	Age, Gender, Region ⁴
Canada	1,000	1,001			
China³	1,000	995			
France	1,000	1,000			
Germany	1,000	1,001			
India	1,000	996			
Japan	1,000	1,001			
Mexico	1,000	957	+/- 4.2 pct pts. total sample	+/- 5.9 pct pts. half sample	
Saudi Arabia	1,000	930		+/- 6.0 pct pts. half sample	
S. Africa	1,000	1,004	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	
S. Korea	1,000	992			
UAE	1,000	949	+/- 4.2 pct pts. total sample	+/- 5.9 pct pts. half sample	
UK	1,000	1,002	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	
U.S.	1,000	984			

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. All data collected in China is from the mainland. Regions of Greater China were not surveyed.

4. There were additional quotas on nationality in Saudi Arabia and the UAE, and ethnicity in the UK and U.S.



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Survey Languages Used and Internet Penetration by Country

	Languages	Internet Penetration*
Global	-	83%
Brazil	Portuguese	83%
Canada	Localized English, Canadian French	93%
China	Simplified Chinese	70%
France	French	92%
Germany	German	94%
India	Localized English	60%
Japan	Japanese	93%

	Languages	Internet Penetration*
Mexico	Localized Spanish	77%
Nigeria	Localized English	68%
Saudi Arabia	Localized English, Arabic	89%
S. Africa	Localized English, Afrikaans	63%
S. Korea	Korean	97%
UAE	Localized English, Arabic	100%
UK	Localized English	95%
U.S.	English, Localized Spanish	94%

*Data source: <http://www.internetworldstats.com/stats.htm> as of Jan. 5, 2023

Appendix: Full Question Text



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Full Text for Answer Choices Abbreviated

Personal and Societal Threats Heighten Consumer Vulnerability

PERS_EMO. How much do you worry about each of the following? *Please select one response for each.*

Shortened	Full
Climate change	Climate change leading to drought, rising sea levels and other natural disasters
Inflation	Your pay increases not keeping up with the inflation rate causing you to lose ground financially
Global conflict	International conflicts escalating into nuclear war
Misinformation	Being able to find trustworthy information about important issues
Rights and freedoms	Losing some of the rights and freedoms you have as a citizen of this country
Polarization	Political polarization: the inability of people on opposing sides of societal issues to get along with each other, and work together to solve the problems your country is facing
My health	Your physical health



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Full Text for Answer Choices Abbreviated

We Place More Value on Brands That Address Our Vulnerabilities

ATTRACT. You are about to see a series of two choices. Please pick the one that better describes the type of brands that you are more attracted to, or that you find more appealing, these days. *Please select only one of the two options given.*

Shortened

Brands that increase my sense of safety and security

Brands that spark my sense of adventure and thrill-seeking

Full

Brands that increase my sense of safety and security

Brands that spark my sense of adventure and thrill-seeking, and show the energizing effect of risk-taking



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Full Text for Answer Choices Abbreviated

We Are Putting Brands Under More Scrutiny; We Are More Concerned About a Brand's Impact

MKT_BEV_CHG. Given all that has happened in the past year, how, if at all, have you changed as a shopper when it comes to each of the dimensions listed below? *Please use the slider to indicate where you fall between the two extreme end points of each scale.*

Shortened	Full
More price conscious	I am a lot more price-conscious
Doing more research before I buy	I am doing much more thorough research before I buy a new brand or product
Making fewer impulse purchases	I am making far fewer impulse purchases than I used to
Health impact	I am far more concerned about how healthy the products I buy are
Environmental impact	I am much more concerned about the environmental impact of the products I buy



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Full Text for Answer Choices Abbreviated

Gen Z Heightens Expectations for Brands to Show Their Values

Q17. Please indicate how much you agree or disagree with the following statements. *Please select one response for each.*

Shortened

Brands should make it easier to see their values when I am about to make a purchase

Full

Brands should make it easier for me to see what their values and positions on important issues are when I am about to make a purchase

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? *Please select one response.*

Shortened

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

Full

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

Gen Z Transforms How Consumers Buy Products and Interact With Brands; Gen Z Transforms Consumer Expectations for How Brands Do Business

KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? *Please select one response for each.*

Shortened	Full
How I buy online and through apps	Your use of web sites and apps to make purchases
How I give brands negative feedback	How you communicate your dissatisfaction to a brand
How and where I talk about brands	Where and how you talk about brands with other people
How I connect with brands on social	How you interact with brands on social media
A product's environmental friendliness	The level of environmental friendliness you demand from the products you use
The diversity in a brand's advertising	The amount of ethnic and lifestyle diversity you expect to see in a brand's advertising
Employee diversity	What you expect from companies when it comes to increasing ethnic and gender diversity among its employees and within its management team



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Full Text for Answer Choices Abbreviated

Gen Z Transforms How Consumers Buy Products and Interact With Brands

ATT_ARC. Think about the types of things that attract you to a brand and turn you into a loyal, long-term customer. Do you uncover or discover most of those things before you buy the brand for the first time, just after you buy it for the first time and begin using it, or do they tend to come to light slowly over time as you use and buy the brand repeatedly? *Please select one response.*

Shortened

I uncover things that attract me and make me loyal to a brand after my first purchase

Full

Just after I buy it for the first time and start using it
Slowly over time after repeated purchase and use

ATTRACT_RES[#]. Thinking about those things you just indicated were very or extremely important attributes of a brand or of a company that owns a brand, which of the following best describes your behavior? *Please select one response.*

Shortened

I do most of my brand research after I buy

Full

I actively research most or all of these things and determine if they are true about a brand after I buy it and determine that I like it but before I become a regular purchaser or user of the brand



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Full Text for Answer Choices Abbreviated

Consumers Want Ongoing Engagement With Brands

INT_PUR. Why do you engage in these direct interactions with brands? *Pick all that apply.*

Shortened

Full

Evaluate a brand beyond its product

They are an opportunity to get to know a brand better. A way that I can evaluate a brand beyond just examining its product specifications or doing online research.

Save money with discounts

They offer me opportunities to save money by earning a discount, promo code, or a free product

Gather information and learn things

They are opportunities for information and idea gathering. I often learn interesting and valuable things.



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Full Text for Answer Choices Abbreviated

Brand Engagement Builds Trust in the Product and the Brand

INT_IMP_TRST. How useful are these direct brand interactions in establishing or reinforcing whether each of the following is true about a brand? *Please select one response for each.*

Shortened

Full

Competent

performs to my expectations

The brand will perform up to your expectations: The brand is able to fulfill the task you need it for. It will deliver the results it promises.

Ethical

treats customers and employees fairly,
attempts to do good in the world

The company that owns or makes the brand is ethical: It treats customers and employees fairly. It honors its commitments to address societal issues. It is attempting to do good in the world.

Relevant

fits my lifestyle and identity

The brand fits your lifestyle and is compatible with how you see yourself: It is relevant to you, your interests, or your cultural heritage. It accurately represents who you are as a person.



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Full Text for Answer Choices Abbreviated

Consumers Reward Brands They Trust With Purchase, Loyalty, and Advocacy

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.*

Shortened	Full
Buy new products the brand introduces	Buy new products or services the fully trusted brand introduces
Buy the brand even if it is not as cheap	Buy the fully trusted brand even if it is not as cheap as some of my other options
Stay loyal and/or stick with it despite a mistake	Stay loyal to the fully trusted brand, and not be actively shopping around for another brand that I might like better Stick with the fully trusted brand even if it makes a mistake or something goes wrong
Recommend it to others	Recommend the fully trusted brand to other people



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Full Text for Answer Choices Abbreviated

Consumers More Likely to Buy Brands That Take Action; Bi-partisan Consensus for Brands to Act

RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? *Please select one response for each.*

Shortened	Full
Improving healthcare access	Improving access to healthcare
Addressing climate change	Taking actions to combat climate change and environmental degradation
Ending racism	Ending racism and racial inequality
Promoting gender equality	Promoting gender equality
Retraining workers	Retraining their workers who have lost their jobs due to robots or Artificial Intelligence
Combatting misinformation	Protecting the independence of the media and actively combatting misinformation, fake news and outright lies
Protecting LGBTQ+ rights	Expanding and protecting LGBTQ+ rights



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Full Text for Answer Choices Abbreviated

Top Sources for Building Awareness and Brand Trust

BRD_CHNL1. Among the sources of information listed below, select the one that best fits each of the following descriptions. *Please select one response for each.*

Shortened	Full
Brand comms	A direct communication (e.g., post, blog, email, IM, text) from the brand itself The brand's advertising
Media	The news 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)
Search	Search or search engines
My own experience	My own direct, personal experiences or interactions with the brand or product
Customer reviews	Customer/user reviews posted online



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Full Text for Answer Choices Abbreviated

Both Expert and Everyday Voices Make Credible Brand Ambassadors

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? *Please select one response for each.*

Shortened	Full
Scientist/academic expert	A scientist or academic expert
Person like myself	A person like yourself who regularly uses the brand
Brand technical expert	A technical expert who works for the brand
Regular employee	A regular employee of the brand



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Full Text for Answer Choices Abbreviated

When Brands Lack Relevance or Authenticity, Consumers Disengage

INT_WRG. When a brand's attempt to engage or interact with you goes wrong, what are the most common reasons why? *Pick all that apply.*

Shortened

Full

Lack relevance

What they do is not relevant to me

They are exploitative. The brand gets all of the benefit and value from the interaction while I get nothing out of it

They are not being inclusive. Certain groups of people are left out or even disrespected.

What they do is intrusive. They come uninvited and disrupt what I am currently doing.

Unwanted follow-up. After an interaction I am flooded with emails, texts, and other unwanted communications from the brand.

Lack authenticity

It is not well done. What they do or offer is not fresh, fun, or interesting.

What they do is out of character with the brand. They are trying to be something they are not.

What they do is out of touch with today's culture. It is inappropriate or out of sync with what is happening in the culture and the world around them.



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Full Text for Answer Choices Abbreviated

Brands Must Show They Will Hold Themselves Accountable

TRST_BUILD. How effective would each of the following be in building or increasing your trust in a brand? *Please select one response for each.*

Shortened	Full
Owning its mistakes	Owning its mistakes: Admitting and making up for its mistakes and unethical behavior while punishing the wrong-doers
Transparency about its climate impact, supply chain, employee diversity	Transparency: Fully disclosing things like data regarding its environmental and climate impact, details regarding where and how it gets its parts and materials, and information regarding how diverse its workforce is
Working with government to develop regulations	Cooperating with regulators: Working with government to develop appropriate and meaningful regulations for their industry instead of trying to fight against or block regulation
Being culturally relevant	Being culturally relevant: Authentically reflecting today's culture and being current with today's cultural trends
Inspiring advocacy among people I trust	Inspiring support and advocacy among people you trust: Getting people who you trust to vouch for, and speak up in support of the brand
Developing an emotional connection with me	Developing an emotional connection with you: Putting in the time and effort to connect with you on an emotional level



Image Credits

Cover/Slide 1

The Collapse of the Purchase Funnel

Portrait of confident young woman over white background - stock photo: *Maskot* via *Getty Images*

Slide 3

Personal and Societal Threats Heighten Consumer Vulnerability

1. A police officer in uniform, taking pictures on his cell phone. *Egor Myznik* via *Unsplash*.
2. George Floyd Matters sign. *Chris Henry* via *Unsplash*.
3. A crowd of people holding up signs (STOP WAR) and cell phones. *Nati Melnychuk* via *Unsplash*.
4. Global Coronavirus infections BBC news. *Siora Photography* via *Unsplash*.
5. A foggy city skyline with the sun in the distance. *Ahmer Kalam* via *Unsplash*.
6. Fireman looking at fire. *Jay Heike* via *Unsplash*.
7. Empty shelves during Coronavirus. *Wesley Tingey* via *Unsplash*.
8. PAKISTAN-WEATHER-FLOODS-CLIMATE: AAMIR QURESHI/AFP via *Getty Images*.
9. Checking the bill - stock photo: *LordHenriVoton* via *Getty Images*.
10. Protest At Ofgem HQ Over Fuel Bills: *Guy Smallman/Getty Images*

Slide 4

Consumer Vulnerability Changes the Business of Brands

African American man shopping in grocery store - stock photo: *Erik Isakson* via *Getty Images*

Slide 10

Gen Z Transforms How and Why We Buy

Midsection of teenager using phone while sitting with friends by cobbled street - stock photo: *Maskot* via *Getty Images*

Slide 15

The Collapse of the Purchase Funnel

Mother working from home in residential kitchen with family in background - stock photo: *MoMo Productions* via *Getty Images*

Slide 22

The New Paradigm for Building Brands

Friends buying vases at a garden center - stock photo: *FG Trade* via *Getty Images*

