

THE ROLE OF TRUST & CINEMA

Why trust remains an important challenge and the role cinema can help play in building trust for brands



THE ROLE OF TRUST & CINEMA FOR BRANDS



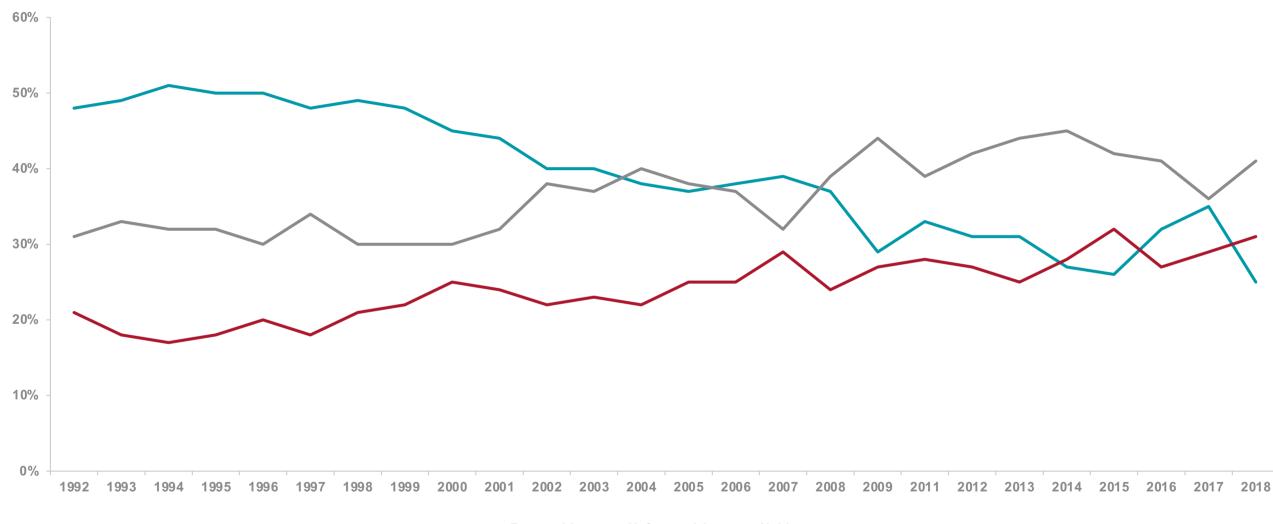


THE CHALLENGE FOR BRANDS



PUBLIC FAVOURABILITY TOWARDS ADVERTISING HAS BEEN IN LONG-TERM DECLINE

In 2018, public favourability towards advertising continued its downward trend hitting an all time of just 25%





FACTORS CAUSING DECLINE IN FAVOURABILITY AND TRUST IN ADVERTISING





WHY TRUST REMAINS IMPORTANT



2019 BRANDZ GLOBAL TOP 100



Most Valuable Brands



18	ups
19	
20	xfinity
21	
22	X
23	WELLS FARGO
24	
25	T ··
26	PayPal
27	参 中国移动 China Mobile
28	accenture
29	ICBC 😢 <u>中国工商银行</u>
30	Spectrum
31	CHANEL
32	Walmart 🔀
33	AMERICAN DOTRESS
34	NETFLIX

35	ACUTAI	52
36	(intel)	53
37	HERMÊS PARIS	54
38	SAMSUNG	55
39	🕨 YouTube	56
40	中国平安 PINGAN	57
41	ΤΟΥΟΤΑ	58
42	ululu cisco.	59
43	L'ORÉAL	60
44	0	61
45	Adobe	62
46	salesforce	63
47	👐 HUAWEI	64
48		65
49	O vodafone	66
50	ORACLE	67
51	Budweiser	68

GUCCI	69
Uber	70
Mercedes-Benz	71
Ö	72
НЅВС	73
RBC	74
Linked in	75
中国建设银行 China Construction Bank	76
HDFC BANK	77
ZABA	78
	79
Bai也百度	80
orange"	81
	82
宗 京东	83
CHASE 🕻	84
	85
	Uber Mercedes-Benz Mercedes-Benz Image: Comparison of the state of

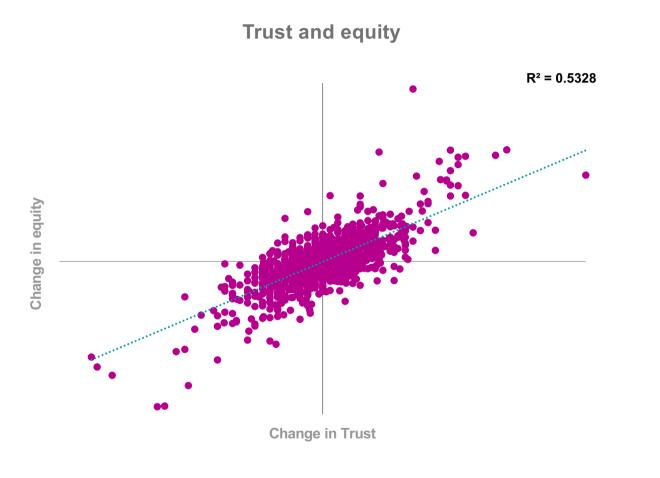
69	FedEx .
70	🕐 NTT
71	🔽 DiDi
72	D
73	J.P.Morgan
74	וח
75	M movistar
76	
77	citi
78	10 美团
79	Pampers.
80	E ∕∕onMobil
81	D&LL Technologies
82	中国农业银行 Agricultural Bank of China
83	Bank of America 🧇
84	Colgate
85	KFC

86	SUBWAY
87	XBOX
88	_
89	Haier
90	AIR
91	CommonwealthBank
92	SIEMENS
93	
94	Lowe's
95	usbank.
96	∭≜ aldi
97	TATA CONSULTANCY SERVICES
98	Gillette
99	BCA
100	adidas

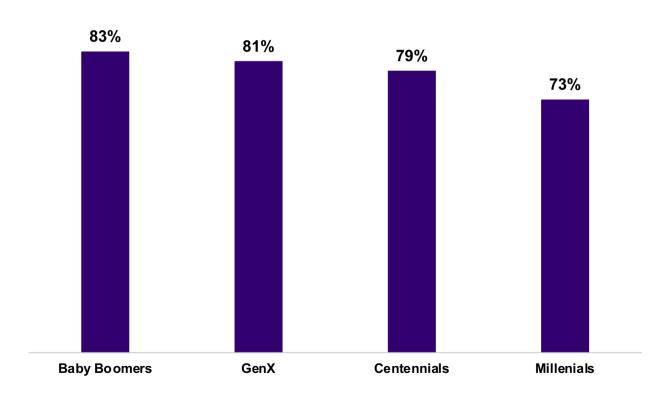


TRUST IS A IMPORTANT ELEMENT UNDERPINNING BRAND EQUITY

Trust is an important element in the decision-making process of consumers – and they would consider abandoning brands they don't trust



"Even if a company makes a product I love, I'll stop supporting them if I don't feel I can trust them"





ULTIMATELY TRUST IS CRITICAL FOR BUSINESS GROWTH

Since 2006 brands who have above average levels of trust have seen a 170% increase in brand value, whereas brands with below average trust have seen value decrease by 13%



above average trust

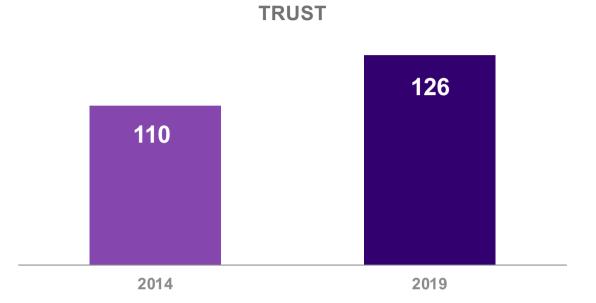
-13% Brands with below average trust



TRUSTED BRANDS HAVE LICENCE TO TAKE RISKS

Initial reports find that sales of Nike goods have increased at a rate double that of last year after its 'controversial' Colin Kaepernick campaign







Sales growth – double the increase of the year before



STRONG EQUITY SERVES TO PROTECT BRANDS IN TROUBLED TIMES

Volkswagen (VW) 5 year progress



Record 10.83m vehicles sold in 2018



POSITIVE AND NEGATIVE DRIVERS OF PUBLIC TRUST IN ADVERTISING

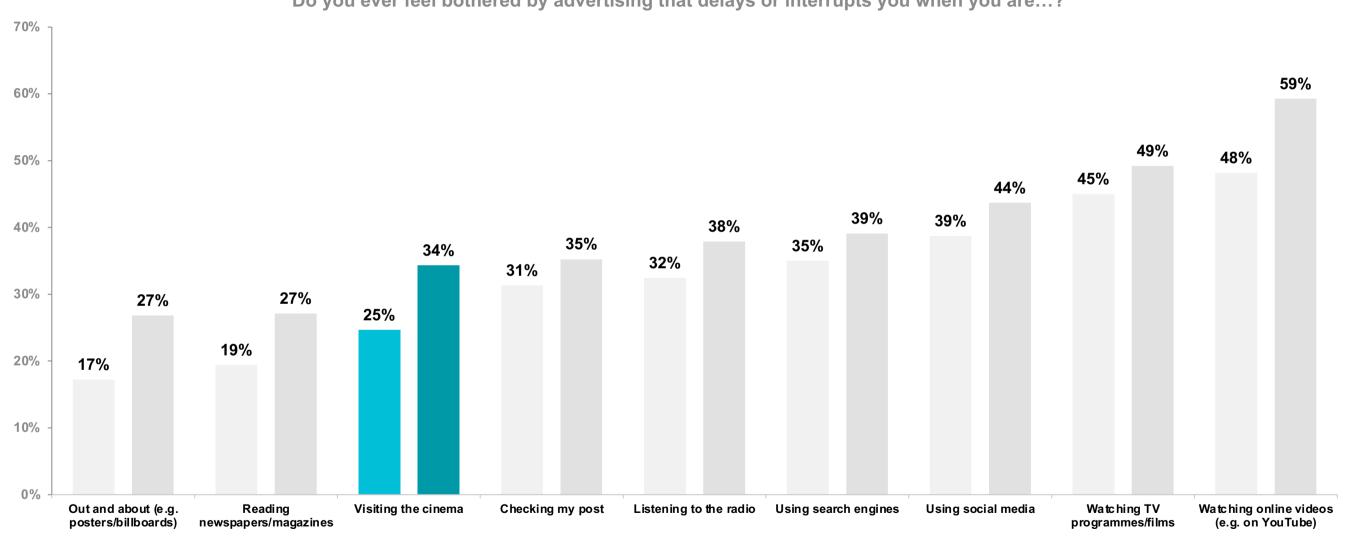
POSITIVE DRIVERS NEGATIVE DRIVERS 25% Creativity / 21% **Bombardment** Entertainment 8% **16%** Sensitive sectors & Social MORE OF THIS contribution vulnerable groups THIS 8% 8% Information Intrusiveness ЧO LESS **5%** 'Suspicious' 4% Value exchange techniques 2% 3% 'Unhealthy' Other advertising



HOW CINEMA CAN HELP BUILD TRUST



CINEMA ISN'T PERCEIVED TO BE AS INTERRUPTIVE AS OTHER AV CHANNELS



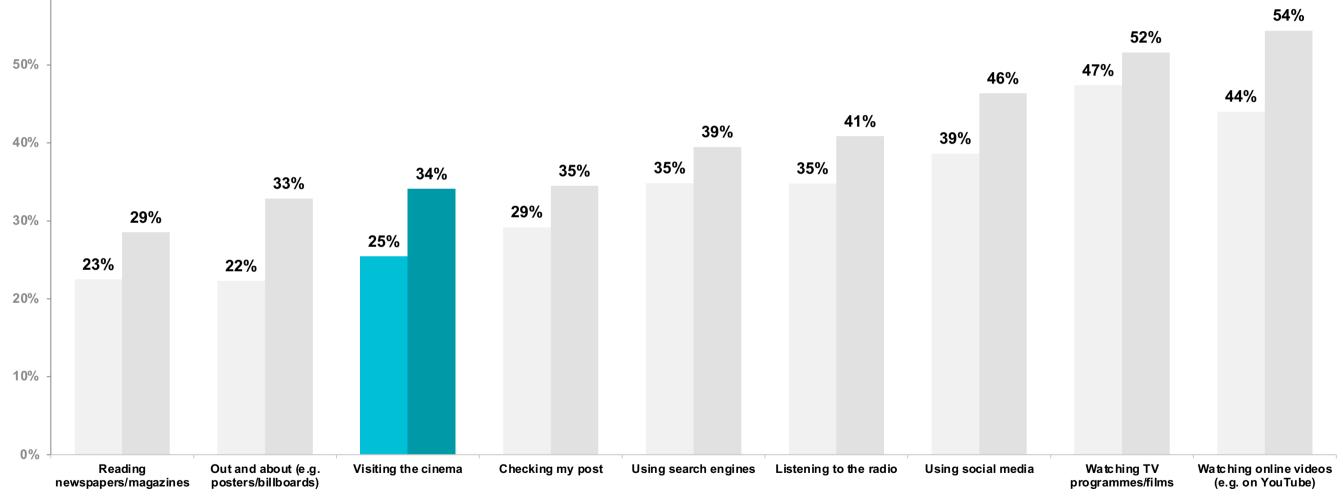
Do you ever feel bothered by advertising that delays or interrupts you when you are...?

Total 18-34



...OR AS REPETITIVE

Do you ever feel bothered by advertising that feels repetitive when you are...?



Total 18-34



60%

CINEMA IS THE MOST TRUSTED MEDIA FOR AV ADVERTISING

Cinema is the AV channel that audiences trust the most in terms of advertising – offering brands a positive environment where audiences are receptive to brand messaging

Gen Z

16-19 year olds

Gen Y 20-34 year olds



Gen X 35-49 year olds



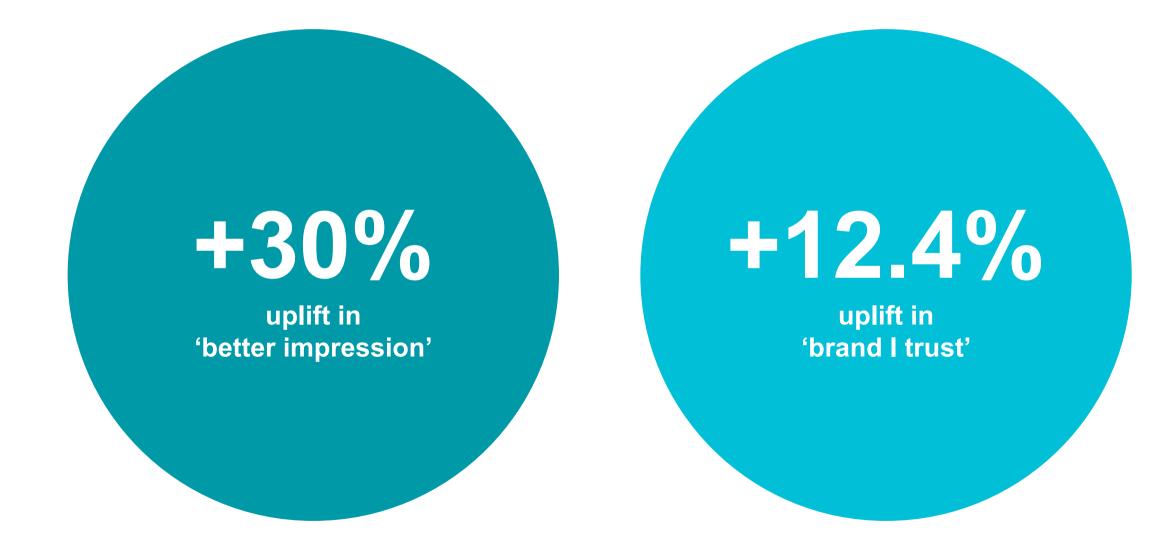
I trust the advertising in...

Cinema vs TV	+119%	+92%	+45%
Cinema vs Internet	+192%	+177%	+220%



ADDING CINEMA TO THE MIX HELPS BRANDS MAKE A BETTER & MORE TRUSTED IMPRESSION

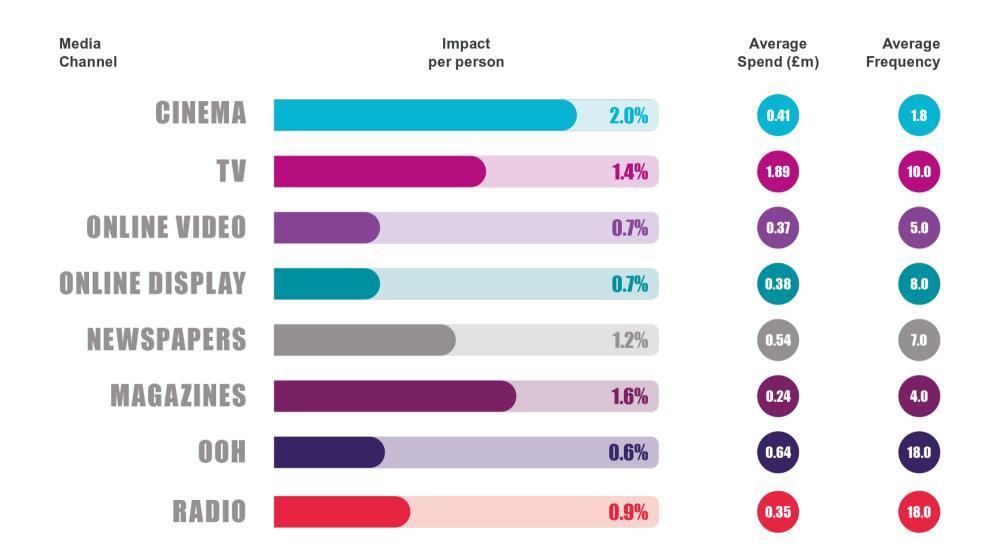
Brands can harness the premium, trusted perception of the cinema environment through using the big screen as a key part of the AV mix





CINEMA DELIVERS THE BIGGEST IMPACT ON BRAND BUILDING

Cinema, magazines and TV are the biggest contributors per person reached across the key brand-building pillars of salience, love, difference, consideration and recommendation



SUMMARY

Brands are facing an increasing challenge with public favourability (and trust in) advertising at an all time low

Trust remains a key element that brands need to consider –it underpins brand equity and there's a correlation with significant business growth too

Cinema offers a unique and engaging environment that allows brands to create the right impression and ultimately build equity





2.

3.