

BEYOND TRUST ENGAGING CONSUMERS IN THE POST- RECESSION WORLD

UK – February 2010

Brought to you by

BRANDZ™

TRUST ALONE IS NOT SUFFICIENT.

**IT NO LONGER ASSURES SUSTAINED BRAND SUCCESS.
NOT IN THIS POST-RECESSION WORLD POPULATED WITH
MORE SCEPTICAL AND LESS ACQUISITIVE CONSUMERS.**

**FOR BRANDS TO SUCCEED IN THIS ALTERED LANDSCAPE,
THEY NEED TO UNDERSTAND AND RESPOND
TO CONSUMERS IN NEW WAYS.**

BUT HOW?

Finding the answers is the challenge that we set for ourselves in a powerful collaboration combining the unique and complementary capabilities of two global consumer research and intelligence leaders – The Futures Company and Millward Brown.

Our findings are available exclusively to WPP clients, please ask your WPP contact for a full report customised by country and industry.



The Futures Company anticipates changes in consumer attitudes and behaviours that can lead to new opportunities and value. Millward Brown applies its in-depth knowledge of global consumers to develop and unleash the full potential of brands. Both are part of WPP, the world's largest and most comprehensive network for consumer research, intelligence and communication.

Recently, The Futures Company discerned a seismic shift in consumer thinking that will shape consumption during and after the recovery. Millward Brown made a similar discovery in the consumer responses that inform its proprietary BrandZ database, the world's largest and most comprehensive reference for brand equity.

This combined research yielded both original insights, which will help brands act effectively, and a set of new metrics to measure those actions. Here is a summary:

1. Trust remains essential. It is the customer's belief, cultivated over time, in the efficacy and reliability of the brand.
2. Recommendation is a separate and vital component of the consumer-brand relationship. Recommendation is the customer's belief, grounded

in recent experience, that the brand continues to perform consistently and fulfil its promise.

3. Brand success requires Trust plus Recommendation. This equation forms an innovative new metric, the TrustR Score, which measures how effectively brands meet the more demanding expectations of the post-recession consumer.

TRUST



RECOMMENDATION



SUCCESS

TRUSTR STRENGTHENS THE BOND BETWEEN CUSTOMER AND BRAND

In fact, we discovered that the bond is 50 percent stronger among brands that consumers say they both trust and recommend. And a stronger bond leads to greater sales.

Why Trust?

Trust is a state of deep belief and assurance. On its most basic level it is about absolute reliability. Our trust in the laws of nature, in the unending sequence of days following nights, gives us the stability and predictability we require for daily living. We set a similar standard of unequivocal trustworthiness for the brands that touch our lives most closely.

Why Recommendation?

When it comes to purchasing decisions, trust alone is not enough. Trust is a state of mind. It's how we think or feel about a brand. It is about our history with a brand and how that brand has treated us over time. Recommendation is more about action. It is a reaction to our recent experiences with a brand. By recommending a brand we demonstrate and affirm our deep trust in it.

Why TrustR?

Because, as this study discovers, a deep bond with the customer requires both Trust and Recommendation. By measuring Trust and Recommendation, TrustR enables brand owners and agencies to understand and manage their brands relative to the competition.

WE CREATED TRUSTR FROM GLOBAL CONSUMER RESEARCH

The research is contained in the proprietary BrandZ database, which tracks thousands of brands in over 30 countries and includes more than a million in-depth consumer interviews.

Established 12 years ago by Millward Brown, BrandZ provides a detailed and quantified understanding of consumer decision-making worldwide.

We analysed consumer responses to two questions:

- How trustworthy is this brand?
- Would you recommend this brand?

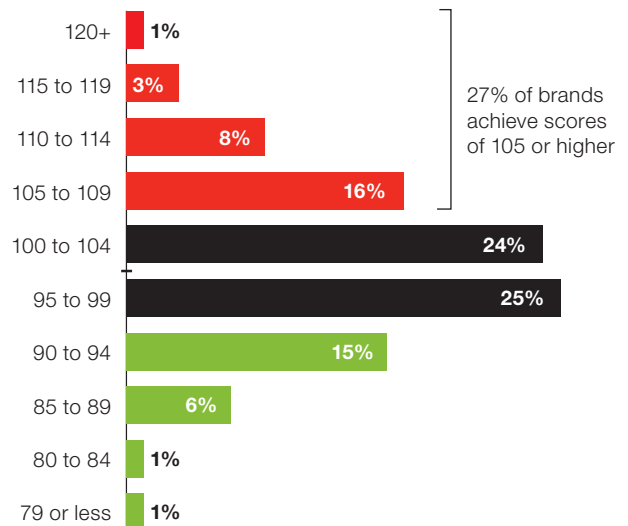
We then created an index for each of these measures, which produced a Trust score and a Recommendation score for each brand. By combining these scores and dividing by two we arrived at each brand's TrustR score.

The average TrustR score is 100. A good score is 105 or more. A poor score is 94 or less.

To make the scores comparable country-to-country, we normalised them to account for local variations in the way people respond.

TrustR range of scores

This chart enables you to quickly see how your brand compares in the distribution of TrustR scores among all brands studied. A score of 105 or higher (red) is above average.



HIGH TRUSTR LIFTS BRANDS IN ALL COUNTRIES

The positive impact of TrustR becomes especially clear in the performance of the TrustR leaders. Across the 22 countries studied, the Number1 TrustR brand enjoys these advantages:

- The brand-customer bond is 10 times greater than the average brand-customer bond.
- The brand is nearly seven times more likely to be purchased.
- The brand shows a high likelihood of short-term, market-share growth.

Brands that score high in TrustR may trade in one country or many countries. They may be global – or not. But they share one quality in common. They are leaders.

Brands that score high in TrustR may trade in one country or many countries. They may be global – or not. But they share one quality in common. They are leaders.



The TrustR leaders by country

These are the Number 1 TrustR brands by country. Some are global. Others are local. All share a powerful brand-customer bond.

| Number 1 TrustR brand by country | | |
|----------------------------------|----------------|-------|
| Country | Brand | Score |
| Australia | Colgate | 126 |
| Brazil | Porto Seguro | 121 |
| Canada | Toyota | 119 |
| China | Nokia | 124 |
| Czech Republic | Microsoft | 121 |
| France | Pampers | 128 |
| Germany | Pampers | 129 |
| Hungary | Nokia | 126 |
| India | Surf Excel | 122 |
| Italy | Nokia | 129 |
| Japan | Toyota | 123 |
| Korea | Cheju SamDaSoo | 126 |
| Mexico | Colgate | 118 |
| Netherlands | Douwe Egberts | 122 |
| Poland | Nokia | 127 |
| Russia | Nokia | 125 |
| Spain | Lindt | 118 |
| Sweden | Nokia | 117 |
| Taiwan | Nokia | 120 |
| Thailand | Nokia | 124 |
| UK | Pampers | 124 |
| USA | Amazon.com | 123 |

HOW DOES YOUR BRAND MEASURE UP?

Do today's consumers consider the brand worthy of both Trust AND Recommendation?

No matter how good a job you're doing, there are probably some gaps. Consumers have changed – dramatically. This report analyses how and why. And it begins to offer some prescriptive advice for constructively dealing with the unprecedented levels of scepticism and apprehension.

We are at an inflection point.

Unsettled by the deep recession, consumers are scrutinizing brands like never before.

Routine responses will not work.

That is why we created TrustR – to yield fresh consumer insights that point brand marketers to new and effective strategies and actions. And that is why we are introducing TrustR exclusively to WPP clients in comprehensive and affordable one-day workshops.

TrustR Brand Workshops

A workshop will help you identify new ways to increase the levels of Trust and Recommendation of your brand. The day will begin with an assessment of your brand in the context of today's consumer and end with suggested action items for increasing both Trust and Recommendation. Experts from Millward Brown and The Futures Company will...

- Provide a brand audit based on your BrandZ data and that of your competitors.
- Share our analysis of your current performance.
- Analyse your competitors to reveal where they may have advantages.
- Look at your category, and others, to extract innovations and best practices.

Then we will sift this information to begin the process of helping your brand to succeed in this new era of risk and uncertainty.

If your brand or your competitors' brand are not currently tracked in the BrandZ database, we would be pleased to arrange for a custom study.

The workshop, organised by Millward Brown, will be tailored to meet your specific needs and will be totally confidential. It will draw on the unique insights and capabilities of Millward Brown and The Futures Company along with the full global brand research and communication capabilities of WPP.

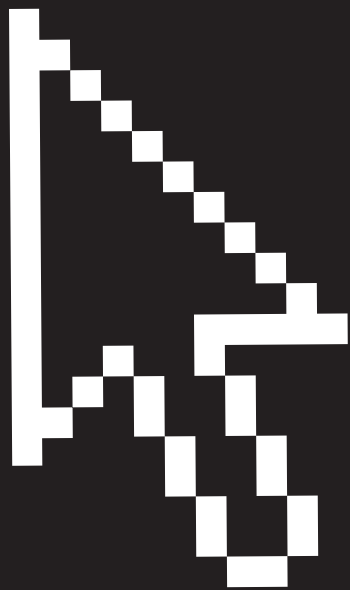
We designed the workshops to be an efficient and effective investment of time and money.

For further information and to arrange for a workshop appointment, please contact Peter Walshe at Millward Brown. We hope to see you at a workshop soon.

FOR MORE INFORMATION CONTACT

Peter Walshe
01926 826213
peter.walshe@millwardbrown.com

Millward Brown



Brought to you by

BRANDZ™

the
futures
company

WPP is a world leader in marketing communications.

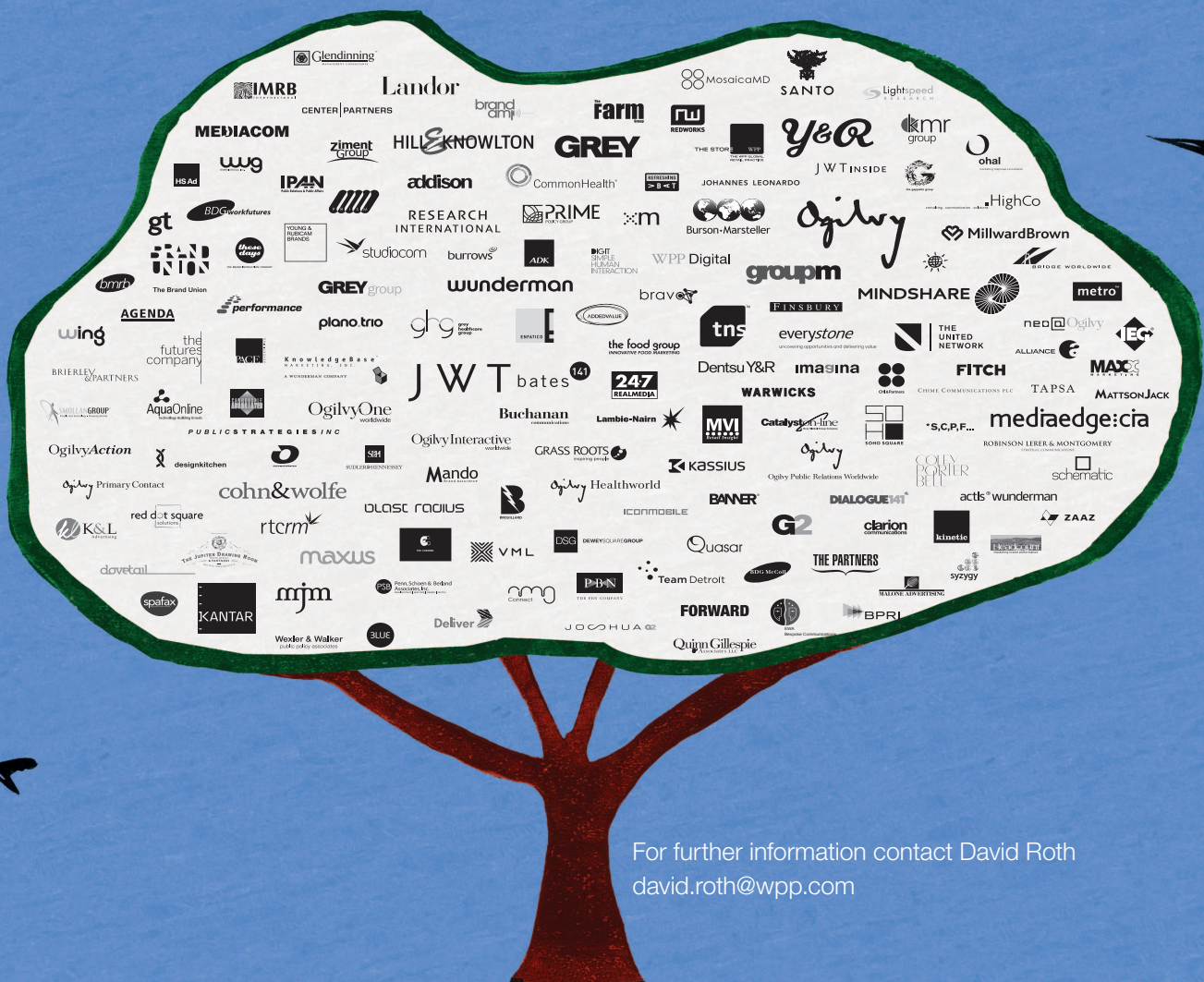
WPP companies, which include some of the most eminent agencies in the business, provides global, multinational and local clients with:

- Advertising · Media Investment Management · Information, Insights & Consultancy · Public Relations & Public Affairs · Branding & Identity · Healthcare Communications · Direct, Digital, Promotion & Relationship Marketing · Specialist Communications

Collectively, WPP employs 131,000 people (including associates) in more than 2,000 offices in 107 countries. Clients include more than 330 of the Fortune Global 500, over half of the NASDAQ 100 and over 30 of the Fortune e-50.

A complete list of WPP companies and a searchable directory is available at:

www.wpp.com/WPP/Companies



For further information contact David Roth
david.roth@wpp.com