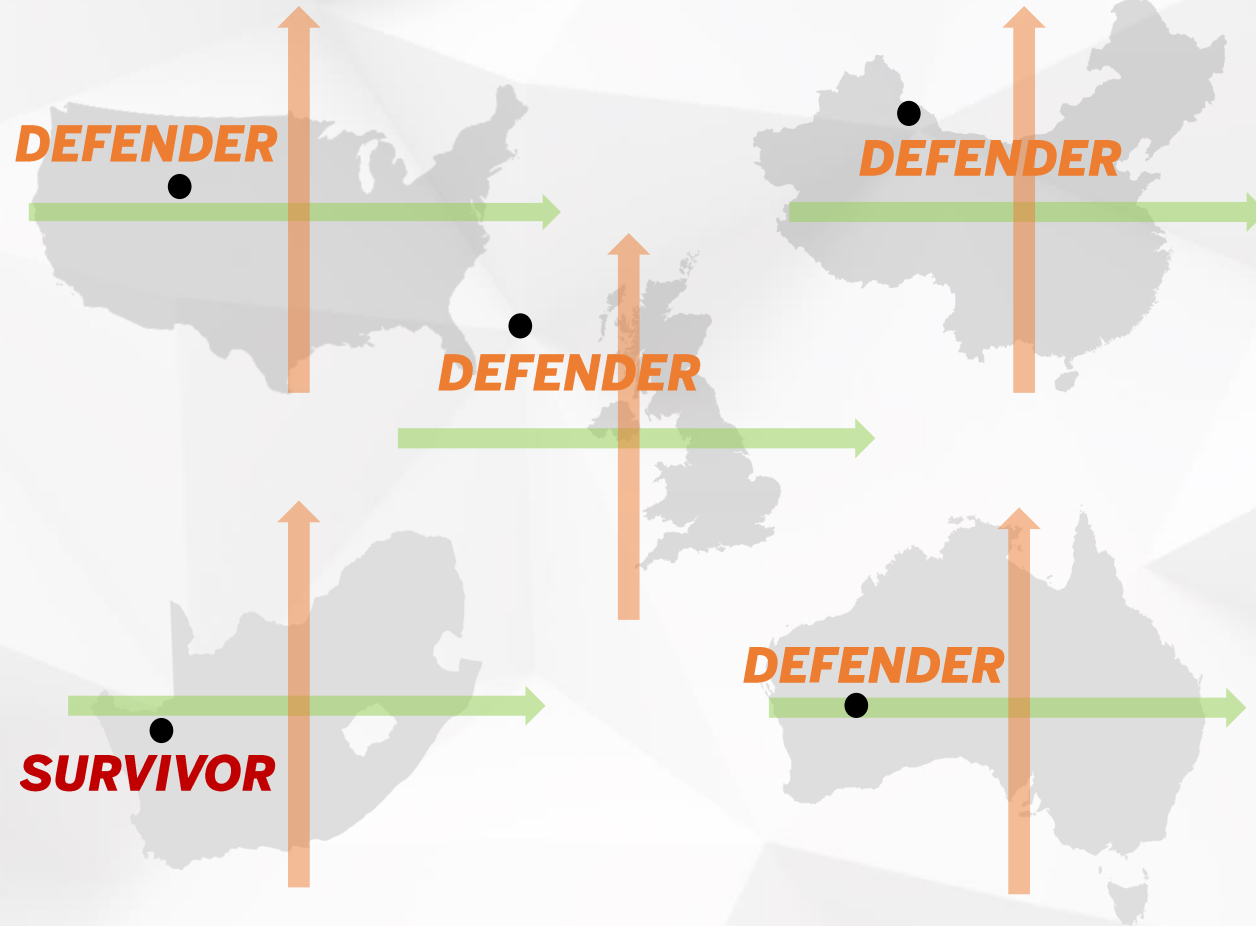




BRANDS IN ***MOTION***

FINANCE & BANKING CATEGORY

FINANCING & BANKING **CATEGORY**



FINANCE & BANKING:

Financial products and services including bank accounts, credit cards, money management, investments, mortgages, personal loans and mobile payment methods.

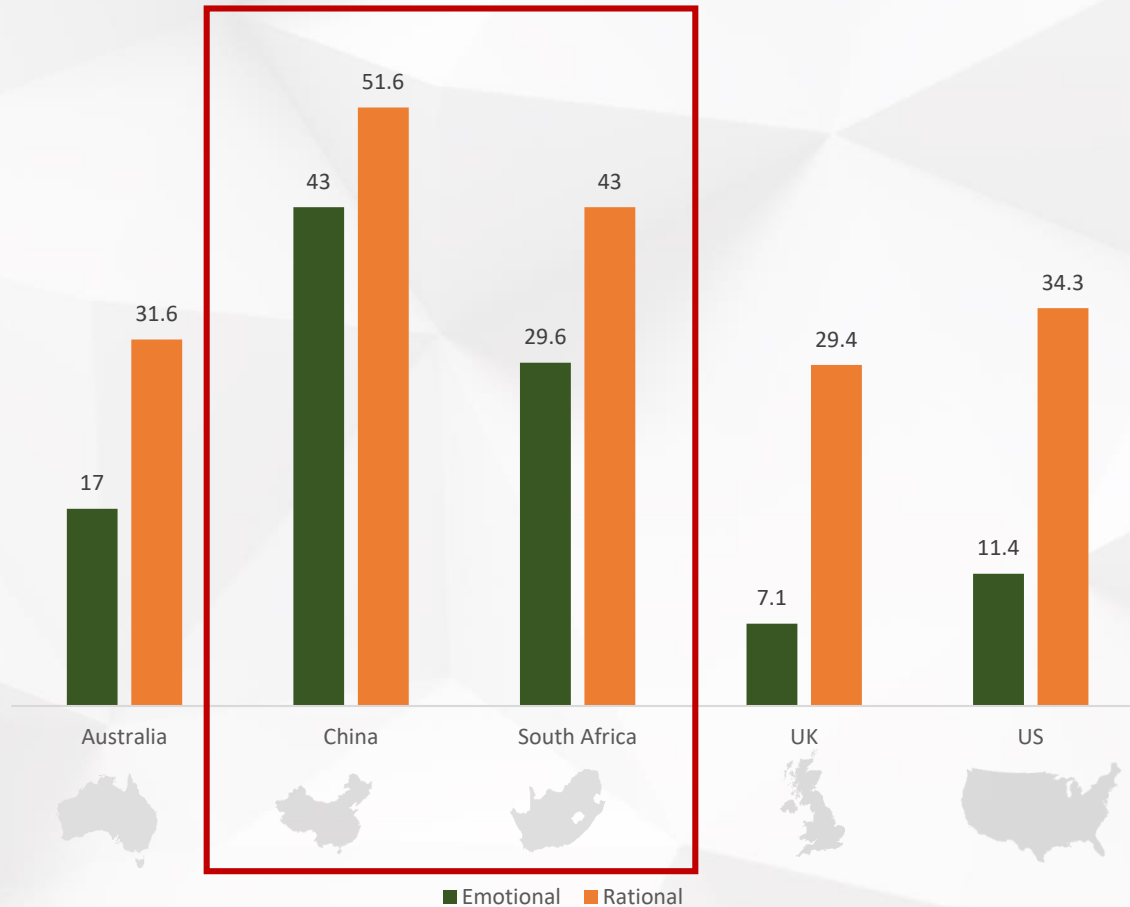
The category was surveyed in five of the six markets and the category fell into the defender quadrant in 4 of the 5 markets surveyed.

A total of 4,302 people answered questions specific to the Finance & Banking category across the five markets.

(US:729, UK:820, China:734, South Africa: 902, and Australia: 1117)



GLOBAL VIEW: **FINANCE & BANKING**



OBSERVATIONS

- China & South Africa had the highest average emotional and rational response rate to the ten category drivers.
- UK had the lowest average emotional and rational response rate to the ten category drivers.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)

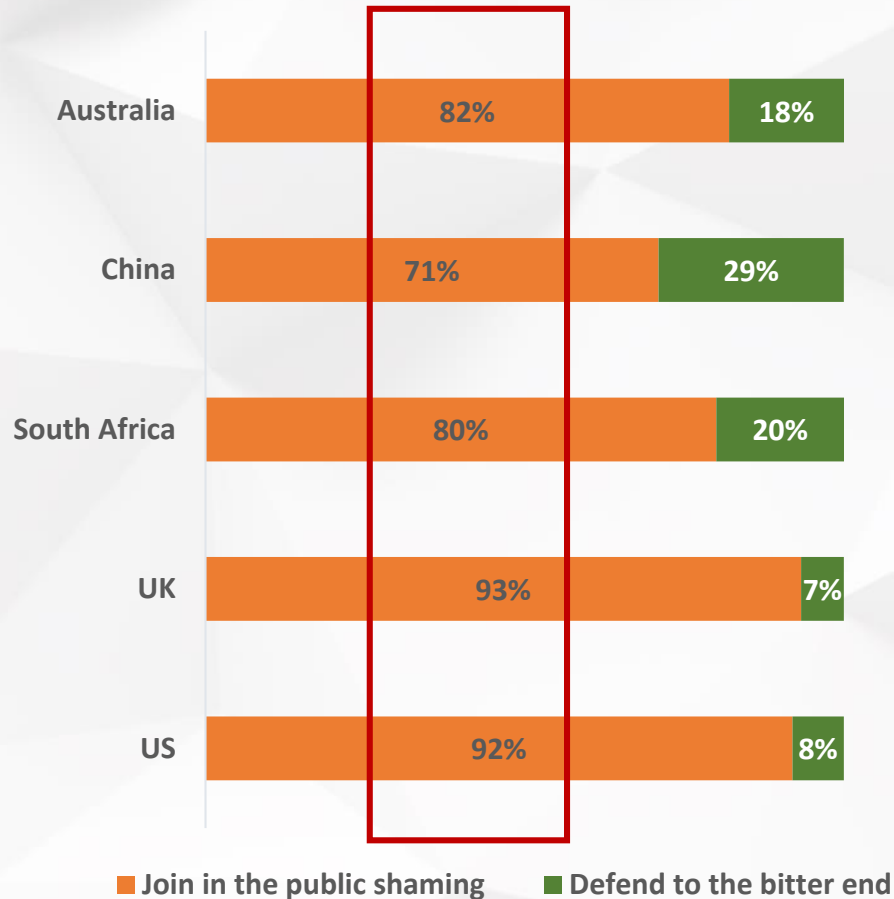




BRANDS IN ***MOTION***

Emotional Drivers

GLOBAL VIEW: **EMOTIONAL DRIVER**



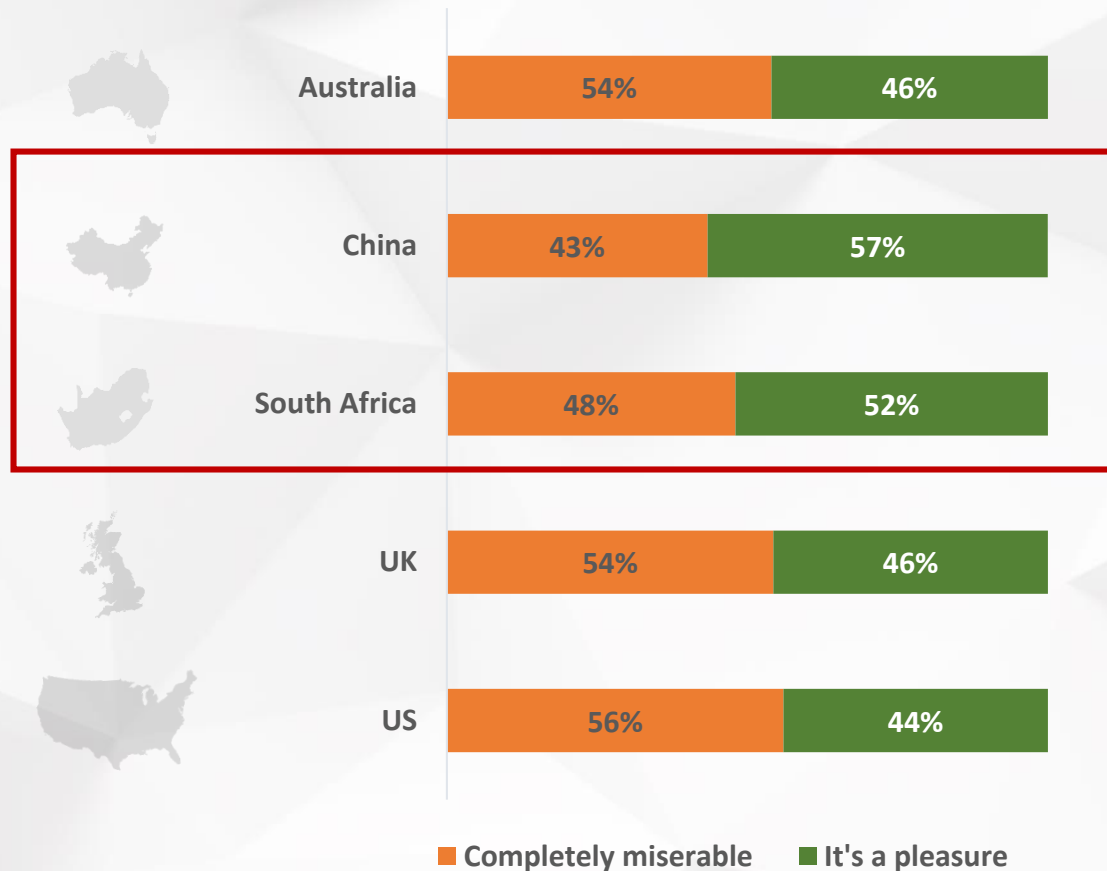
DEFEND OR SHAME

Suppose a Finance/Banking Company was publicly under attack for a product or service issue, would you?

- Across all five markets surveyed, the majority of respondents across the globe would join in the public shaming.



GLOBAL VIEW: **EMOTIONAL DRIVER**



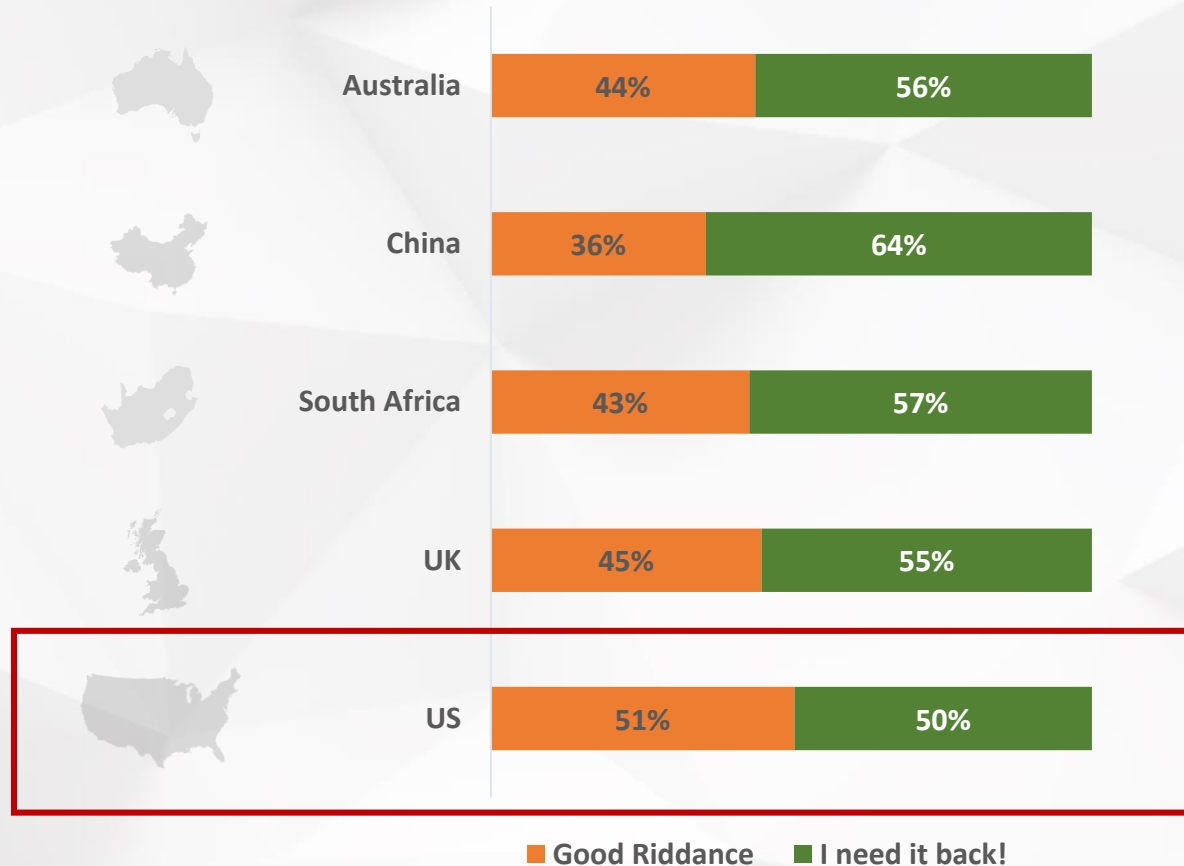
EXPERIENCE

When interacting with Finance/Banking Companies, generally how is the experience?

- Emerging markets more likely to respond with “It’s a pleasure” when asked about experience with Finance/Banking Companies.



GLOBAL VIEW: **EMOTIONAL DRIVER**



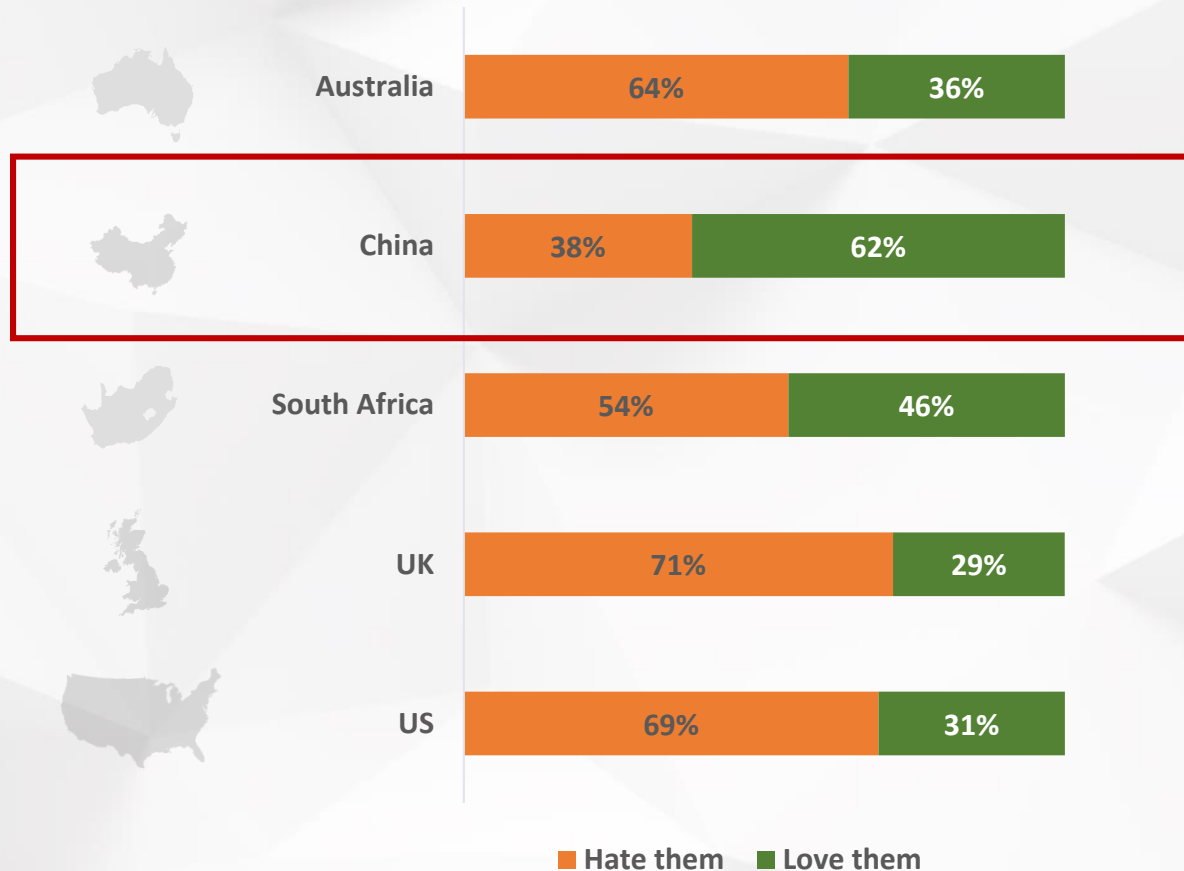
DISAPPEARED

If Finance/Banking were to one day just disappear, how would you feel?

- US was the only market to have more respondents respond with "Good Riddance" than "I need it back". Hangover from the Financial Crisis?



GLOBAL VIEW: **EMOTIONAL DRIVER**



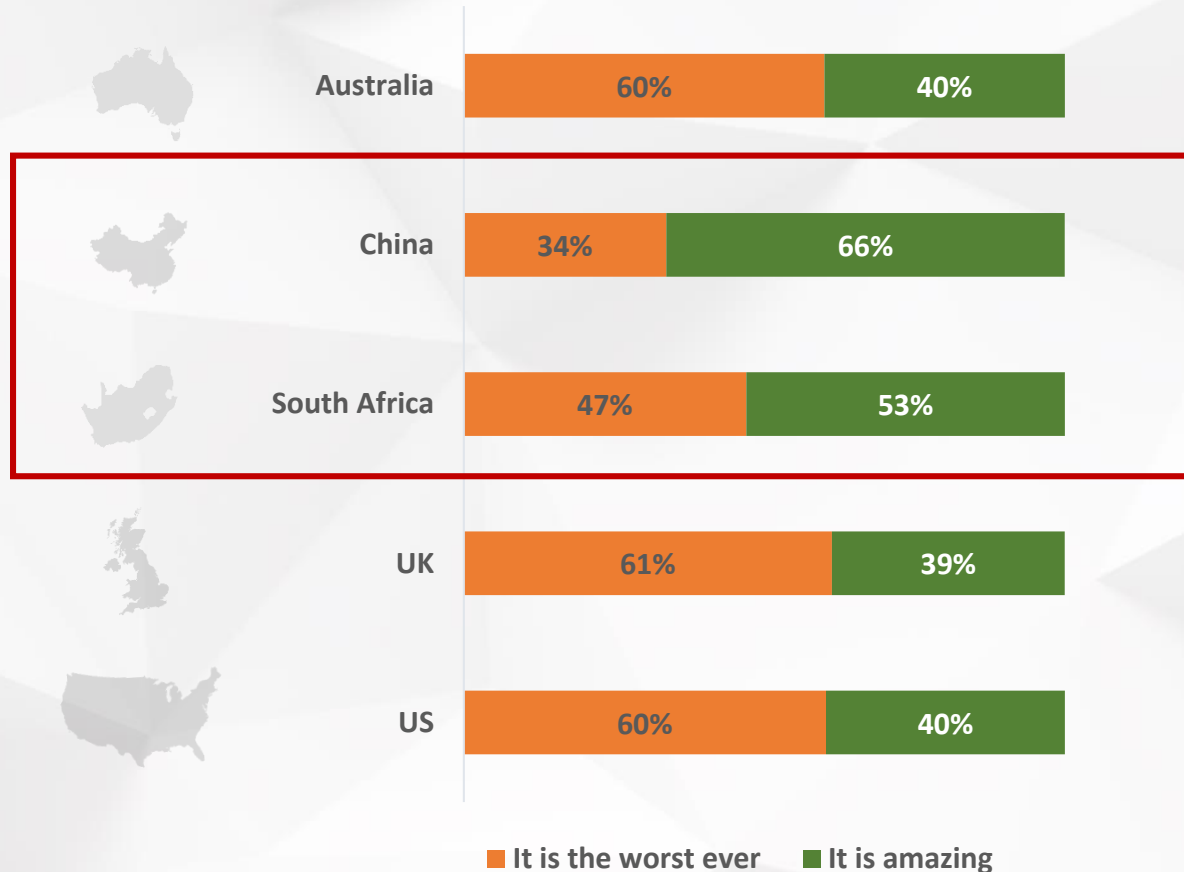
LOVE/HATE

When thinking about Finance/Banking companies do you generally...?

- All markets outside of China expressed general “hate” for Finance/Banking companies.



GLOBAL VIEW: **EMOTIONAL DRIVER**



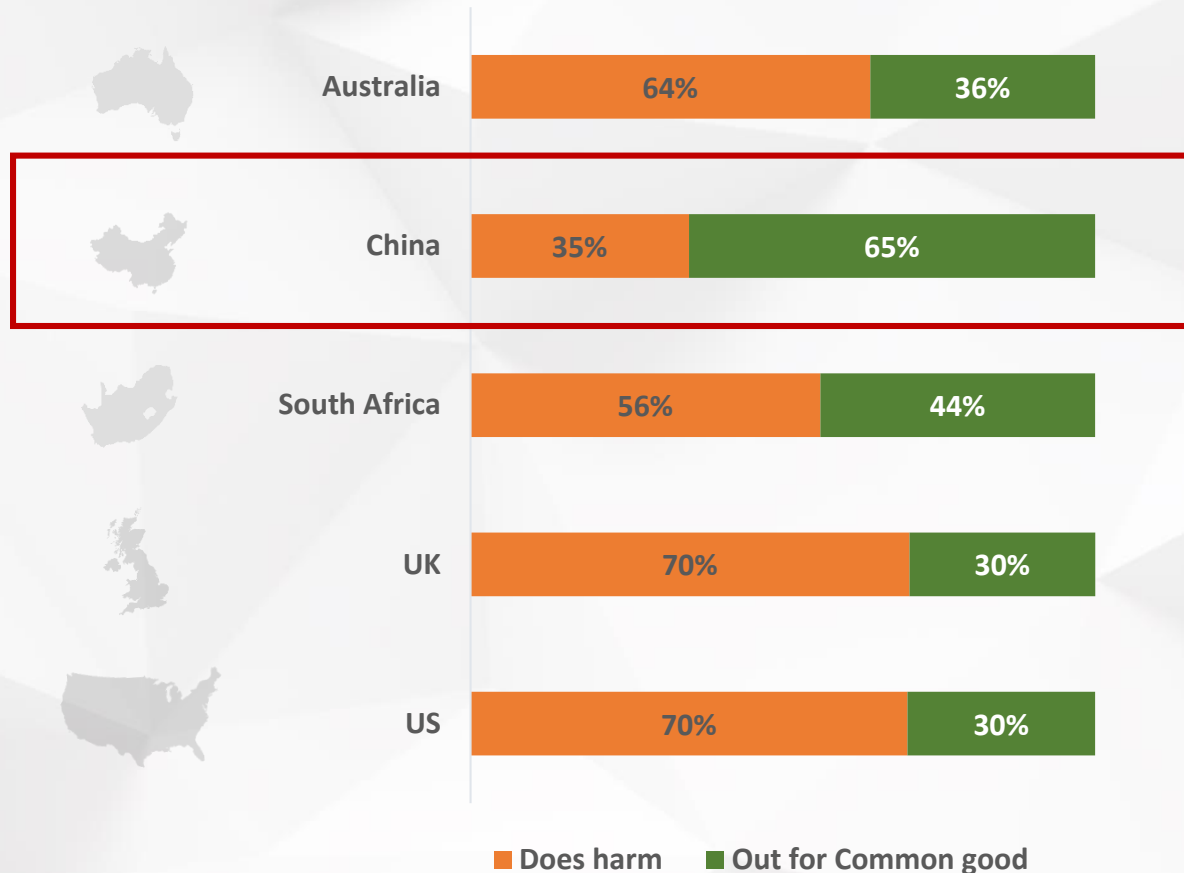
OVERALL IMPRESSION

What is your overall impression of Finance/Banking companies?

- Emerging markets of China and South Africa had a higher impression that more established markets.



GLOBAL VIEW: **EMOTIONAL DRIVER**



SOCIAL IMPACT

When thinking about Finance/Banking companies, what is their overall impact on society?

- Only in China did the majority of respondents think that Finance/Banking companies were out for the common good.

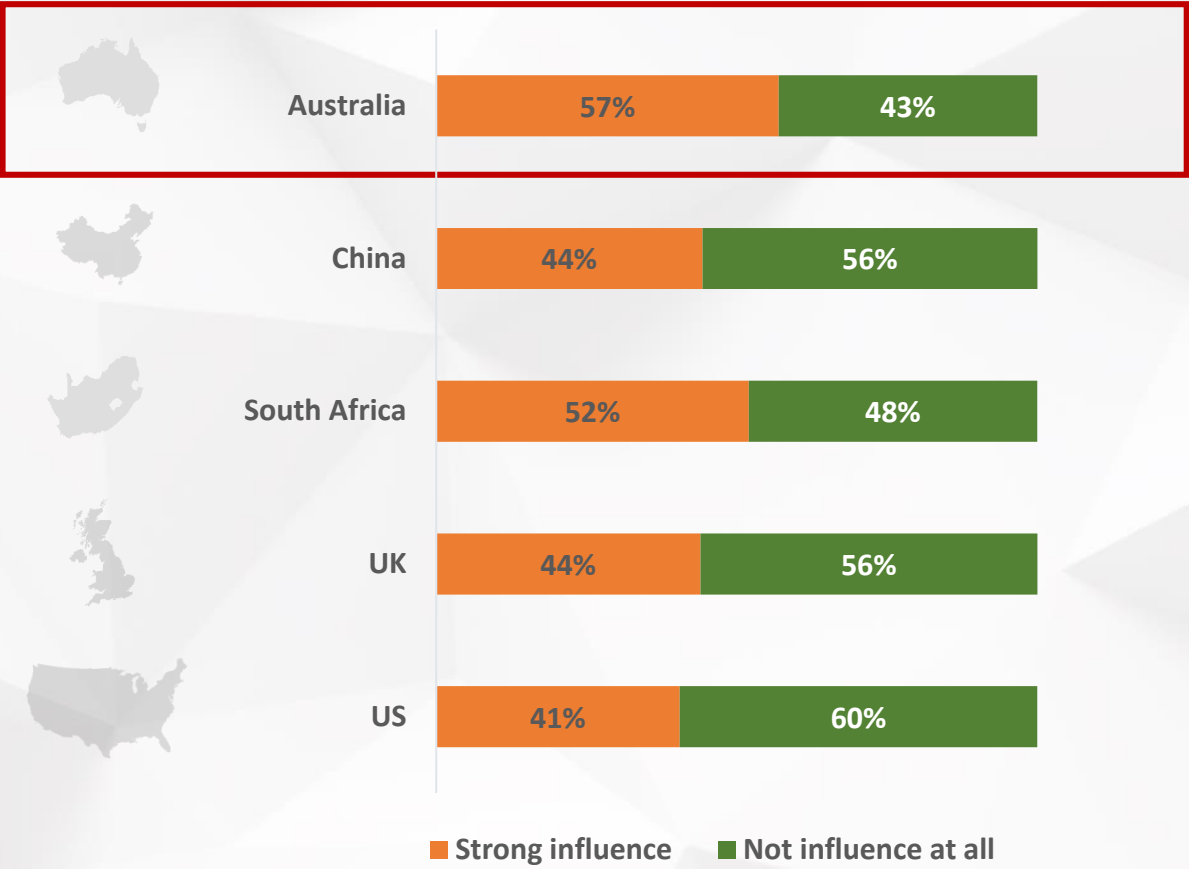




BRANDS IN ***MOTION***

Rational Drivers

GLOBAL VIEW: **RATIONAL DRIVER**



EXECUTIVE BEHAVIOUR

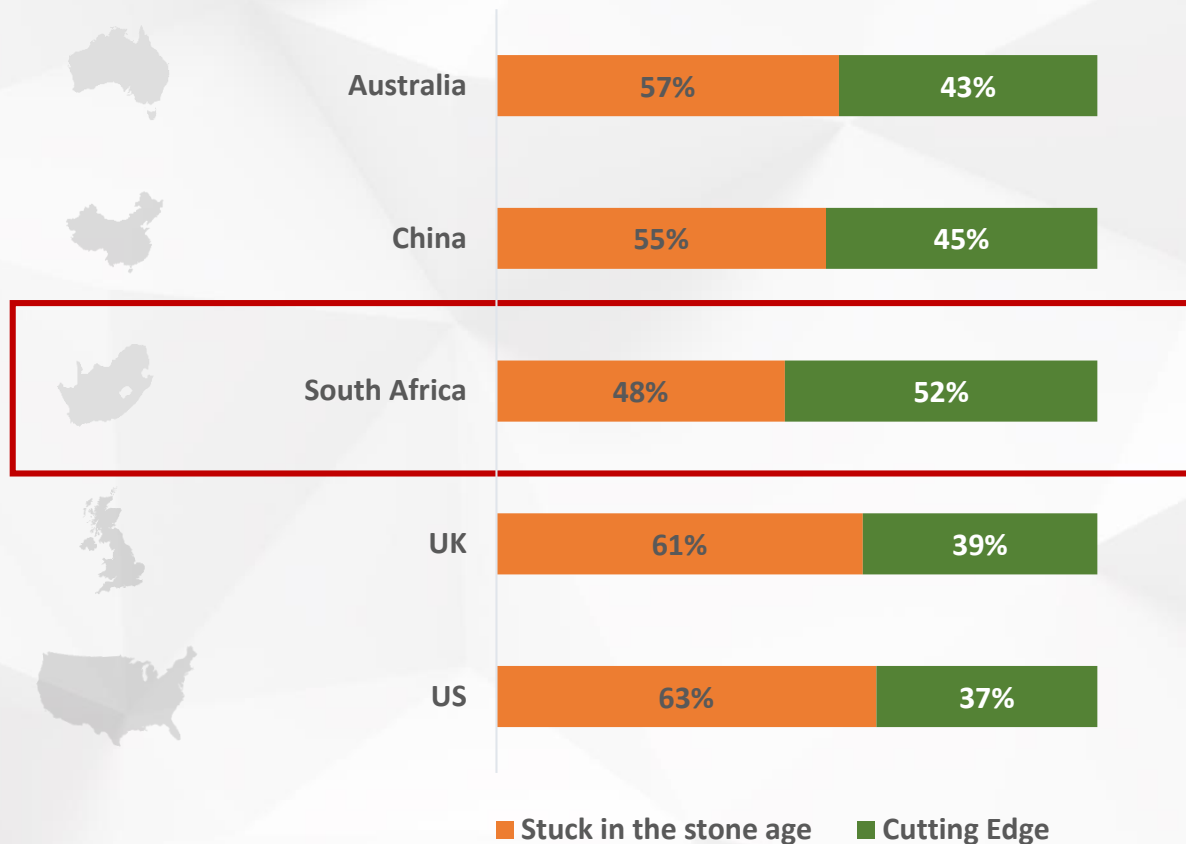
Would the behaviors of the executive leaders of a company in the Finance/Banking industry influence your decision to support the brand or not?

- Australian respondents had the largest percentage of respondents express that the behaviours have a strong influence on if they would support a brand or not.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



GLOBAL VIEW: **RATIONAL DRIVER**



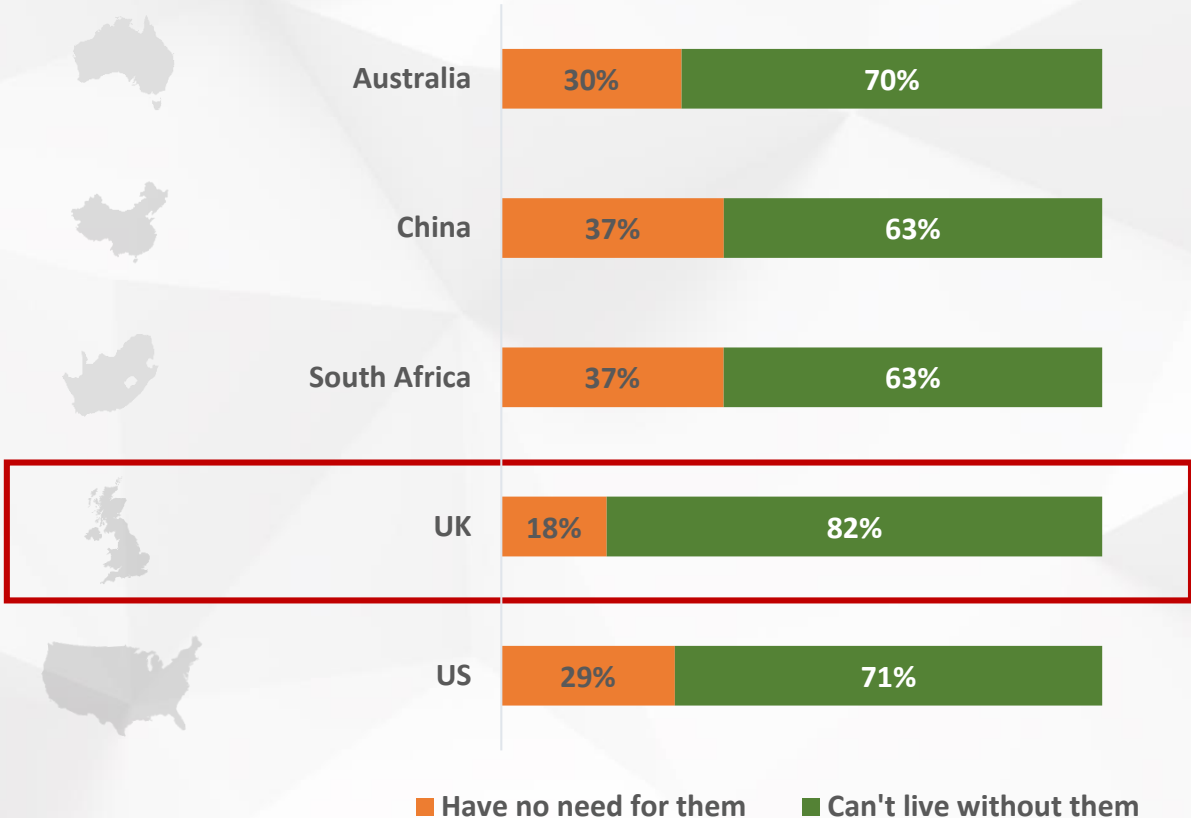
INNOVATION

How innovative are Finance/Banking Companies?

- South Africa was the only market surveyed to have a majority of respondents say that Finance/Banking companies are “Cutting Edge”.



GLOBAL VIEW: **RATIONAL DRIVER**



NECESSARY

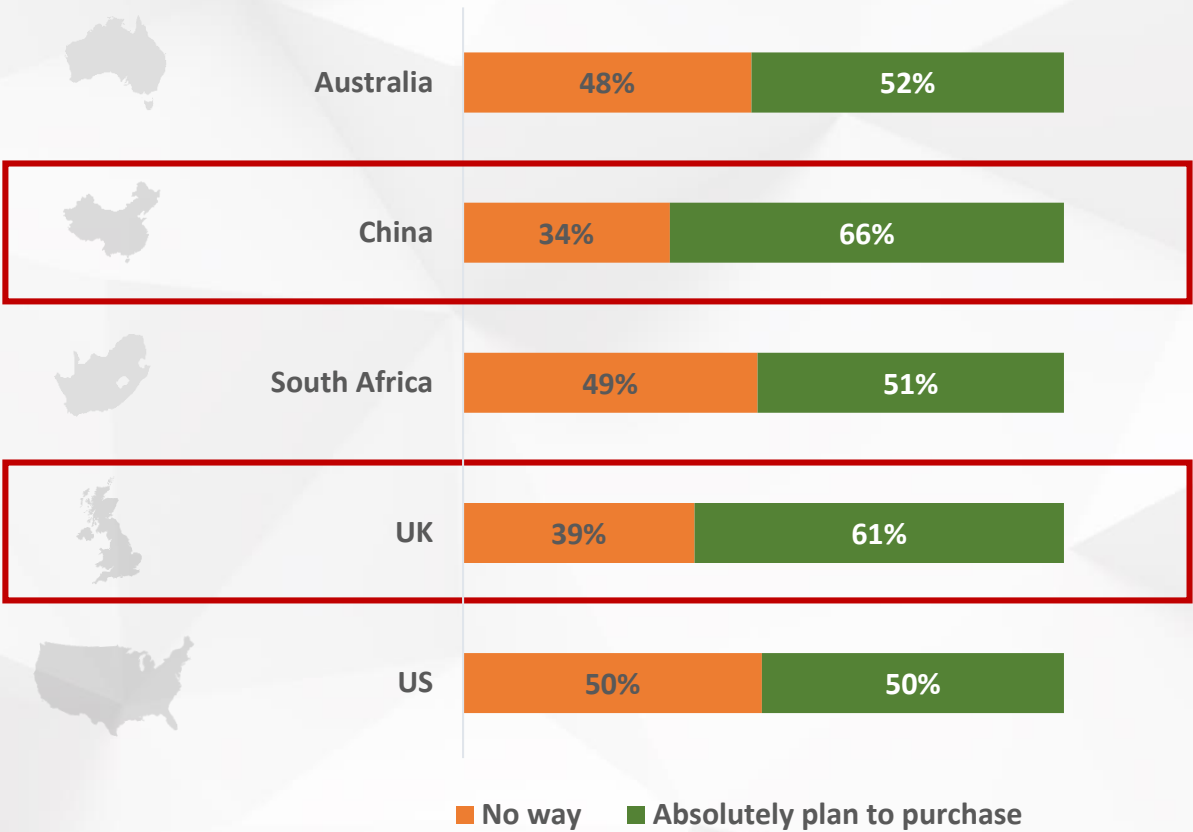
How necessary are Finance/Banking Companies to your life?

- In all markets surveyed the majority of respondents responded with “Can’t live without them”, most notable would be the 82% in the UK.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



GLOBAL VIEW: **RATIONAL DRIVER**



INTENT TO PURCHASE

How likely are you to purchase products or services from Finance/Banking companies in the next year?

- Respondents in the UK and China had the highest percentage of respondents indicating purchase intent in the next 12 months.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

