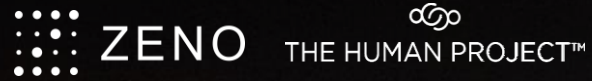
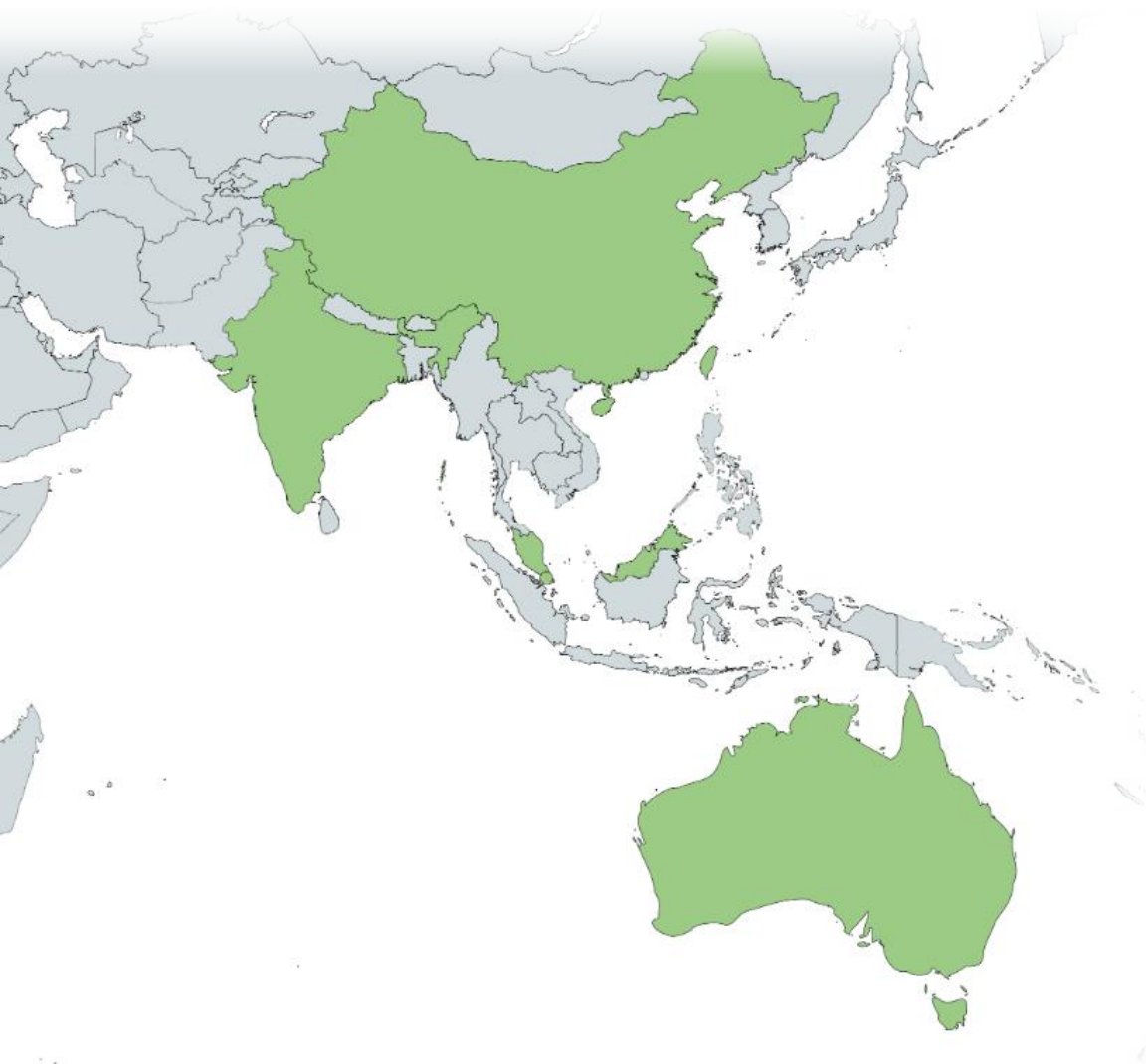


TOPLINE RESULTS

Zeno Group Strength of Purpose Asia Pacific Phase II





In the APAC Market






The New State Of Purpose:

Building on the original Zeno “Strength of Purpose” study (2020), in the wake of the events of 2020 and COVID-19, Zeno Group surveyed more than 5,000+ consumers across the APAC market to understand their attitudes, behaviors, and values on brand purpose, including how these sentiments may have shifted in the past year.

Consistent with the findings from the original “Strength of Purpose” study, this new phase of research not only shows a continued consumer desire for purposeful brands but reveals **an increasing trend in importance** for brands and companies to have or develop a strong purpose.

METHODOLOGY



WHERE	HOW MANY	WHEN
 Australia*  China  India  Malaysia  Singapore	$n = 5049$ (total) $n = 1015$ (Australia) $n = 1000$ (China) $n = 1022$ (India) $n = 1000$ (Malaysia) $n = 1012$ (Singapore)	5 / 19 / 2021 - To - 6 / 9 / 2021
WHO	HOW	MARGIN OF ERROR
Nationally Representative Sample of Adults 18+ (General Population)	Online Survey	Total sample: MOE of +/- 2% Individual countries: MOE of +/- 3% 95% Confidence Level

**Australia was not included in the original Strength of Purpose study (2020)*



SECTION I

Executive Summary



ZENO



THE HUMAN PROJECT™
ZENO GROUP

Executive Summary

High-Level Takeaways

- I. Consumers in Asia are 7.9 times more likely to buy from brands they believe to have a strong purpose, an increase from being 4 times more likely revealed by Zeno's first wave of research released just one year ago**
- II. The pandemic has increased the importance of purpose, with 77% of consumers saying that purpose has become even more important to them in the last 12 months**
- III. There is evidence that more brands are responding to current trends and elevating purpose**
- IV. But while 96% regionwide say brand purpose is important, only 45% believe that most brands have a strong purpose, revealing a significant – and costly – “purpose gap” in the region**
- V. Gen Z and millennials are driving the momentum, but Generation X and Seniors are not far behind**

Executive Summary

Purposeful Brands Are Rewarded

The 2021 Zeno “Strength of Purpose” study finds that consumers are more likely to recommend (champion), protect (support), trust and purchase from brands or companies with a strong purpose over those with a weaker one. When a brand is perceived to have a strong purpose, consumers in APAC are:

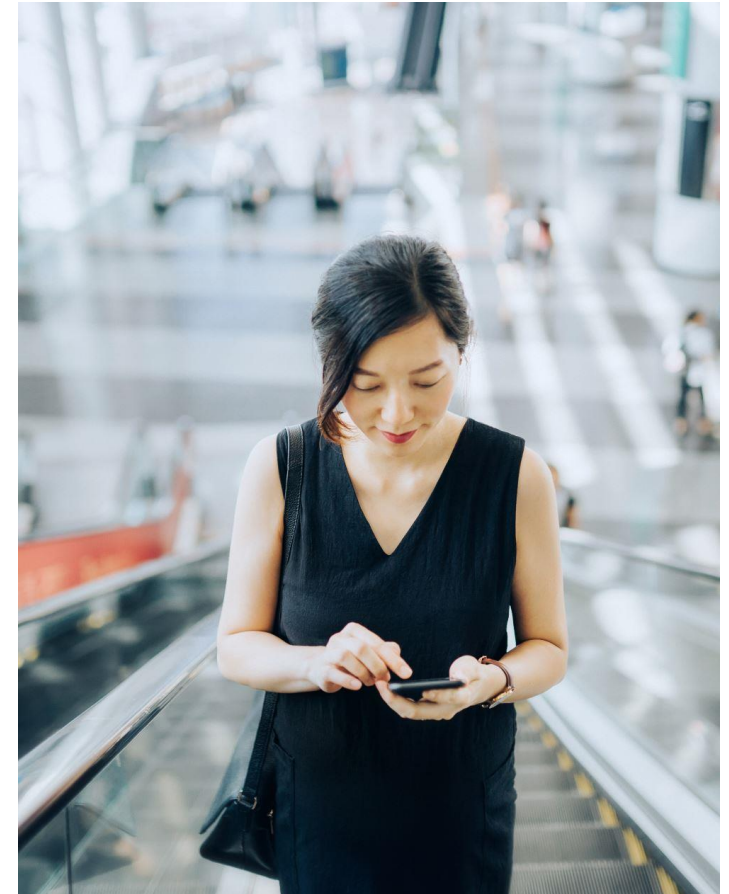
7.9x more likely to **purchase** the brand

9.8x more likely to **recommend (champion)** the brand

9.1x more likely to **trust** the brand

6.6x more likely to **protect that brand in a challenging moment**

**Brand Purpose defined as: “a company’s fundamental reason for being – what it does everyday for all the people it serves, both inside and outside the company. It goes beyond products and services or securing profit and speaks to what the brand is doing to change people’s lives and the world overall for the better.”*



The State Of Purpose In 2021

In 2021, A Strong Purpose Is More Important Than Ever

In 2020, Zeno Group released the results of its first Global “Strength of Purpose” study*. Consistent with the trends seen in the previous study, APAC consumers continue to feel that purpose is very important. In fact, a strong share of consumers feel it has become **EVEN MORE** important today.

Following a tumultuous year and the COVID-19 pandemic, consumers across APAC are expressing an even **GREATER** desire for brands to live by a strong purpose, feeling that the time for brands and companies to step up and make a positive impact on the world is **now more important than ever before**.

Across APAC, **3 in 4 (77%)** consumers say they feel it’s now more important for brands and companies to have a strong purpose today, when compared to before COVID-19 and the events of 2020.

While a majority of consumers across markets mirrored this sentiment, it was revealed that consumers in India (**88%**), China (**83%**) and Malaysia (**80%**) were particularly likely to say that having a strong purpose became even more important over the past year.

please note that the results of the original Strength of Purpose Study were fielded **prior to the onset of COVID-19.*

3 in 4

APAC Consumers felt that it is MORE important for brands and companies to have a strong purpose, compared to before COVID-19 and the events of the past year. (77%)



60%



83%



88%



80%



74%

[Top-2-box “Much More” or “Somewhat More” Important]

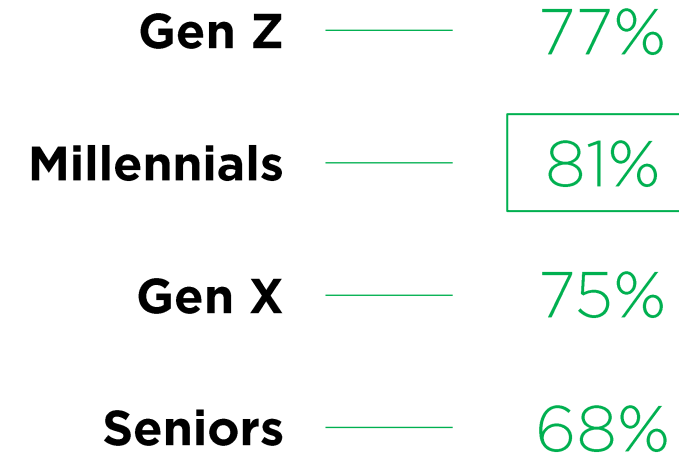
The State Of Purpose In 2021

Millennials & Gen Z Are Driving The Purpose Demand

The demand for brands and companies with strong a purpose is evident across all generations. In fact, Gen Z, millennials, and Gen X all echo this sentiment at statistically similar levels. Seniors also tend to share this view, albeit less strongly than the younger generations.

Of the Gen Z and millennials who feel purpose is more important today than it was previously, **4 in 10 feel that it is MUCH MORE important (38% and 43% respectively).**

“It is MORE important TODAY that brands and companies have a strong purpose, as compared to before COVID-19 / Coronavirus and the events of the past year”



[Top-2-box “Much More” or “Somewhat More” Important]

The State Of Purpose In 2021

Despite Growing Consumer Demand, A Purpose Gap Remains

96%

Of APAC consumers want the brands and companies they engage with to have a **strong purpose**.

HOWEVER



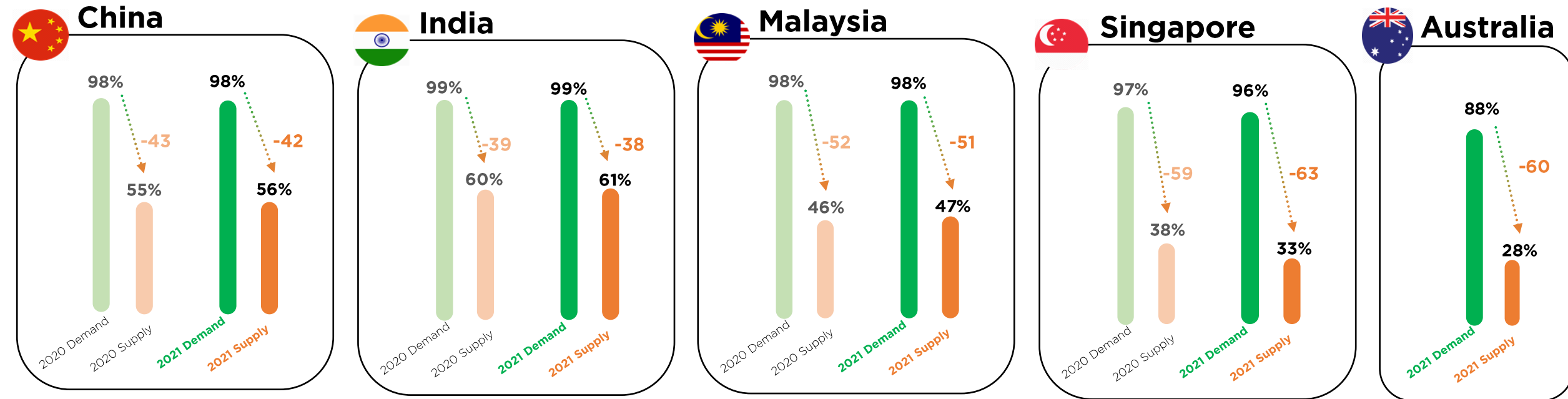
45%

Less than half of APAC consumers feel most brands and companies currently have a strong purpose.

The State Of Purpose In 2021

Purpose Gap By Markets, 2020 to 2021

Over the past year, **the share of consumers who desire / are looking for brands to have a strong purpose stayed consistently extremely high (~95%+) across ALL markets**. Additionally, most markets acknowledged that brands made some positive progress on purpose over the past year, as indicated by the slight increase in consumers who feel that most brands have a strong purpose; however, the purpose gap remains significant, particularly as consumers across these markets say that brand purpose has become **EVEN MORE** important today (77% across APAC).



[**Demand:** Top-3-box important that brands and companies they engage with have a clear and strong brand purpose.]

[**Supply:** Top-2-box how many brands and companies in the world today have a clear and strong brand purpose.]

**Please note: Australia was not evaluated in the Wave I Strength of Purpose study*



SECTION IV

Implications & Strategic Opportunities For Brands



ZENO



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Implications & Strategic Opportunities For Brands

Brands Take Note:

- I. Expectations are increasing for companies and brands to have a purpose and act in alignment with that purpose**
- II. It's not enough to have a purpose - brands must consistently communicate and engage consumers around its purpose to breakthrough**
- III. Align with what is most important to your consumers: treatment of employees, responsible business practices, sustainability and key values**
- IV. APAC consumers see their wallets and their voices as tools for positive change, so arm your supporters with shareable social content**
- V. Find authentic ways for the C-suite to champion the company's purpose to demonstrate commitment**

Implications & Strategic Opportunities For Brands

Zeno Group Purpose Offerings

**Purpose
Positioning**

**Corporate
Responsibility /
ESG Strategy**

**Social Impact
Campaign
Development and
Activation**

**Employee
Engagement**

**DE&I and
Multi-cultural
Marketing**

**Integrated Purpose
Marketing
Communications**

THANK
YOU

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