Executive Summary

The Authenticity Gap
Managing expectations and experience
The Authenticity Gap: Managing expectations and experience

What people say about you is as important as what you say about yourself.

But what happens when what an organization does and says is out of sync with the expectations and experiences of its stakeholders? It creates a gap that is an expensive barrier to success and growth – and in some cases, a destructive force.

Instant information and heightened social interaction is creating an environment that every business needs to actively manage. Organizations need a new set of measures that offer a single view of stakeholder expectations and experiences that encompasses both brand and reputation.

Fleishman-Hillard and Lepere Analytics have partnered to create a new research methodology to help companies understand and pro-actively manage the ‘Authenticity Gap’ – the gap between consumers’ expectations and their actual experience of a company or brand. The research identifies nine drivers that shape perceptions of a company. The drivers can be tracked over time to monitor the organization’s current authenticity and momentum against key competitors. All findings are country, category and brand specific.

The data shows managers what they can do, specifically, to close the gaps between expectations and experience, allowing them create true relationships with consumer audiences – real Authentic Engagement – that drives progress and opportunity.
Executive summary

Mind the Gap: Companies face global gap between consumer experience and expectation

A new global research project by Fleishman-Hillard and Lepere Analytics found that for every brand studied there is an Authenticity Gap – a gap between peoples’ expectations of the category and their actual experience of the company or brand.

In a world where companies and management are under increasing scrutiny, understanding and addressing the expectations and experiences of those we are trying to have a relationship with is fundamental. Companies can no longer succeed if they fail to align their behaviors and their messages with the expectations of their stakeholders.
The Power of Nine: The drivers of authenticity

The DNA of Authentic Engagement is made up of three essential strands: Management behavior, Customer benefits and Society outcomes.

Each strand is made up of three individual drivers. Management behaviors are driven by ‘doing right,’ ‘consistent performance,’ and ‘credible communications.’ Customer benefits are a combination of ‘better value,’ ‘customer care,’ and ‘innovation.’ And finally, Society outcomes are driven by ‘employee care,’ ‘community impact,’ and ‘care of the environment.’

Together these nine authenticity drivers provide the code of conduct to understanding and managing authentic engagement. They map to the agendas of today’s stakeholders and how they engage with a company.

For example the ‘consistent performance’ driver maps to the investor agenda while ‘better value’ clearly maps to the consumer agenda. But where in the past these different stakeholder groups might be addressed in isolation, in today’s interconnected world this can no longer be the case.

By first understanding the authenticity gap through the eyes of the ‘expert consumer’ companies have a key piece of insight to help them engage more authentically. These insights can be combined with other data to understand the full spectrum of various stakeholder expectations and experiences, creating a roadmap for companies to better align their brand and reputation.

The drivers were identified and validated in separate studies in the US, Germany and China through a combination of primary and secondary research. Additional information on the methodology is available in the full reports.
Executive summary cont’d

There is no such thing as “Global”: Consumer expectations vary widely by market

Consumer expectations in virtually every one of the 20 categories studied differ from country to country. For example, one would think expectations of the automobile category, for something as universal as cars, would be consistent from country to country. But expectations vary widely.

**Automobiles authenticity gap %**

2012 | Qtr 4

**Authenticity Gap:**

![Category expectation minus Category experience equals ±% gap](image)

In the US, the category is falling short of expectations on care of the environment. The same is true in Germany but to a much lesser extent. In China, however, the category is credited with broadly meeting expectations of care of environment. People’s actual experience of brands also differs markedly from country to country.
Executive summary
cont’d

Corporate behavior matters as much as customer care
The drivers that make up consumer benefits may be the most important but consumers are putting more weight on the combination of management behavior and a company’s impact on society than things closer to home such as customer care or innovation. This finding is consistent across all 20 categories in all three countries.

In many categories consumers now have a personal relationship with brands that goes deeper than transactions. Such deep, personal relationships are raising consumer expectations and putting greater emphasis on corporate behavior.

Category leaders meet or exceed competitors on all 9 authenticity drivers
In an overwhelming number of cases, across 20 different business categories in US, China and Germany the market leader met or exceeded expectations for all nine drivers. They also exceeded by a wide margin the expectations that consumers held for the one or two differentiating drivers in the category.

Regulation, competitive activity or simply consumers transferring experience and expectations from one category to another are amongst the many forces continuously shaping and shifting stakeholder expectations. Category leaders understand that maintaining momentum requires meeting expectations and engaging authentically on a consistent basis.
Only four industries are meeting expectations

The categories that appear to have the greatest momentum in meeting consumer expectations in all three countries are: On-line shopping, Major Appliances, Tablets & E-Readers and Pharmaceuticals.

Those with the weakest momentum are the Vacation & Travel, Internet Service Providers and Wireless Carriers categories. These seven categories appear consistently in the top/bottom 10 across all three countries.

China most optimistic followed by US and Germany

All 20 categories in the China study recorded positive momentum, unlike in the US and Germany. Momentum is an indicator of the authenticity gap – how successfully peoples’ expectations of the category are being met (or not) by their actual experiences of the companies and brands.

The US is reasonably positive but with lower overall momentum scores across all categories; the Wireless Carrier category is the only category to have a negative score. By comparison, Germany is the least optimistic with four categories recording negative competitive momentum; Life, Property, Health Insurance, Banking & Investing, Shipping & Logistics and Energy. Overall the German scores are in a similar range to the US.
The study was conducted in the US, China and Germany across 20 different categories of products and services and studied more than 150 brands.

The methodology ‘flips’ the traditional recruitment process and identifies a subset of consumers who self-select categories in which they have a higher level of interest, knowledge, engagement and influence.

Qualifying respondents are polled on three key measures:
1. Expectations of the category
2. Actual experience of brands
3. Perceptions of brand momentum

Each respondent ranks their expectations of the category and their experience of the brand on nine drivers. These drivers map to today’s stakeholder agendas and shape perceptions of a company. The drivers fall into three groups: management behaviors, customer benefits and society outcomes, with customer benefits being the most significant.

The authenticity drivers were identified and validated in separate studies in the US, Germany and China.
**Authenticity Guides**

Authenticity Guides help clients understand and pro-actively manage the authenticity gap and monitor the organization’s competitive momentum against key competitors. All findings are country, category and brand specific. Available on-request.

**Custom Guides**

Custom Guides apply the same methodology in a deep-dive into a particular company or brand and the particular issues and opportunities they face. They can be commissioned in all major markets worldwide and are available on-request.
### Internet Service Providers
- AT&T Inc
- Verizon Communications Inc
- Time Warner Cable
- DirecTV
- Charter Communications Inc
- Comcast Corp
- Cox Communications Inc

### Discount Retail
- Costco Wholesale Corp
- Family Dollar Stores Inc
- Ross Stores Inc
- Sears Holdings Corp (Kmart, Sears)
- Sears Holdings Corp
- Target Corp
- Wal-Mart Stores Inc (Wal-Mart, Sam’s Club)

### Pharmaceuticals
- Abbott Laboratories
- AstraZeneca PLC
- Bayer AG
- GlaxoSmithKline PLC
- Merck & Co Inc
- Novartis AG
- Roche Holding AG
- Sanofi

### Fast Food Restaurants
- Chick-fil-A Inc
- Doctors Associates (Subway)
- Domino’s Pizza Inc
- Burger King Worldwide Inc
- McDonald’s Corp
- Papa John’s International Inc
- Yum! Brands Inc (Papa John’s, Taco Bell)

### Software
- Adobe Systems Inc (Acrobat, Photoshop)
- Autodesk Inc (AutoCAD)
- McAfee Inc
- Microsoft Corp (Office, Windows)
- Salesforce.com Inc
- Symantec Corp (Norton)

### On-Line Shopping
- Amazon.com Inc (Amazon, Zappos)
- Apple Inc (iTunes)
- eBay Inc (eBay, PayPal)
- The Gap Inc (Piperlime)
- IAC/Interactive Corp (ShoeBay)

### Shipping & Logistics
- Deutsche Post AG (DHL)
- FedEx Corporation
- Ryder System Inc
- United Parcel Service Inc
- United States Postal Service (USPS)
- Schneider National, Inc.
- Penske Corp.
- J.B. Hunt Transport Services, Inc.

### Energy
- BP
- Exxon Mobil
- Chevron Corp
- Royal Dutch Shell
- Petrobras
- Statoil

### Family & Fast/Casual Restaurants
- Biglari Holdings Inc (Steak ‘n Shake)
- Carl’s Jr/Fast Fish
- Chipotle Mexican Grill Inc
- Darden Restaurants Inc (Olive Garden, Red Lobster)
- Buffalo Wild Wings
- Sun Capital Partners (Boston Market)
- Panera Bread Co

### Family, Property, Health Insurance
- Aetna Inc
- Allstate Corporation
- Berkshire Hathaway Inc (Geico)
- Nationwide Insurance
- Progressive Corp
- Sun Life Financial
- The Travelers Companies Inc
- United States Automobile Association (USAA)

### Table & E-Readers
- Acer (Iconia Tab)
- Amazon.com Inc (Kindle)
- Apple Inc (iPad)
- Barnes & Noble (Nook)
- Rakuten Inc (Kobo)
- Research in Motion (Blackberry)
- Samsung Electronics (Samsung Galaxy)
- Huawei (MediaPad)

### Specialty Retail
- Hallmark Cards Inc
- Barnes & Noble
- Michaels Stores
- Bed Bath & Beyond Inc
- Best Buy Co Inc
- AutoZone Inc
- HHGregg Inc

### Banking & Investing
- Bank of America Corporation
- Barclays Plc
- JP Morgan Chase & Co (Chase)
- Citigroup Inc
- Fidelity Investments
- Royal Bank of Scotland Group plc
- State Street Global Advisors (State Street)
- Sun Life Financial

### Wireline Carriers
- AT&T Inc (AT&T Mobility)
- Qwest Communications (Qwest Wireless)
- Sprint Nextel Corp
- Deutsche Telekom AG (T-Mobile)
- America Movil (Tracfone)
- United States Cellular Corp (U.S. Cellular)
- Verizon Communications Inc (Verizon)
- Vodafone Group PLC (O2)

### Tablets & E-Readers
- Acer (Iconia Tab)
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- Rakuten Inc (Kobo)
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- Huawei (MediaPad)

### Energy
- BP
- Exxon Mobil
- Chevron Corp
- Royal Dutch Shell
- Petrobras
- Statoil

### Beverages
- The Coca-Cola Co (Coke, Diet Coke)
- PepsiCo Inc (Pepsi, Diet Pepsi, Gatorade)
- Nestlé SA (Perrier)
- Danone (Evian)
- Red Bull

### Building & Equipment
- Electrolux
- General Electric Co (GE)
- Whirlpool Corp
- Sears Holdings Corp (Kenmore)
- LG Electronics (LG)
- Sub-Zero/Wolf Inc. (Sub-Zero, Wolf)
- Viking Range Corporation (Viking)

### Wireless Carriers
- AT&T Inc (AT&T Mobility)
- Qwest Communications (Qwest Wireless)
- Sprint Nextel Corp
- Deutsche Telekom AG (T-Mobile)
- America Movil (Tracfone)
- United States Cellular Corp (U.S. Cellular)
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- McAfee Inc
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- Salesforce.com Inc
- Symantec Corp (Norton)

### Scooter & Motorcycle
- BMW
- Honda Motor Co Ltd
- Daimler AG (Mercedes-Benz)
- Subaru
- Toyota Motor Corp
- Volkswagen AG (VW)

### Smartphones
- Apple Inc (iPhone)
- Google Inc (Android)
- HTC Corporation (HTC)
- LG Electronics Inc
- Motorola Inc
- Nokia Oyj
- Research in Motion (Blackberry)
- Samsung Electronics (Samsung Galaxy)

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- Apple Inc (iTunes)
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### Automobies
- BMW
- Ford Motor Co
- General Motors
- Honda Motor Co Ltd
- Daimler AG (Mercedes-Benz)
- Subaru
- Toyota Motor Corp
- Volkswagen AG (VW)

### Tab & E-Readers
- Acer (Iconia Tab)
- Amazon.com Inc (Kindle)
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### Banking & Investing
- Bank of America Corporation
- Barclays Plc
- JP Morgan Chase & Co (Chase)
- Citigroup Inc
- Fidelity Investments
- Royal Bank of Scotland Group plc
- State Street Global Advisors (State Street)
- Sun Life Financial

### Energy
- BP
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### Life, Property, Health Insurance
- Aetna Inc
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- Autodesk Inc (AutoCAD)
- McAfee Inc
- Microsoft Corp (Office, Windows)
- Salesforce.com Inc
- Symantec Corp (Norton)
### Internet Service Providers
- China Telecom Corp. Ltd (China宽带)
- China Mobile Ltd (China铁通)
- China Unicom Ltd
- CNTC Network Co. Ltd and Chengdu Dr. Peng Technology Company Ltd (盛世宽带网络)

### Discount Retail
- Wal-Mart Stores Inc (Walmart)
- Carrefour S.A. (Carrefour)
- China Tai Group (Lotus)
- Beijing Jinglei Group Co Ltd (Jinglei)
- China Resources Enterprise Ltd (Nanguan)
- Beijing Huatian Group (Huatian)

### Smartphones
- Google Inc (Android)
- Samsung Electronics (Samsung Galaxy)
- Lenovo Group Limited (LePhone)
- Huawei Technologies Co Ltd (Huawei)
- Yulong Computer and Telecommunications (China Wireless Technologies Ltd) (Coolpad)
- ZTE Corporation
- Apple Inc (iPhone)

### Major Appliances
- LG Electronics (LG)
- Philips
- Siemens AG
- Samsung Electronics Co Ltd (Samsung)
- TCL Corporation (TCL)
- Haier Group (Haier)
- Midea Group (Midea)
- Schuan Changhong Electric Co (Changhong)

### On-Line Shopping
- Amazon Inc (Amazon.cn)
- eBay Inc (eBay, PayPal)
- Alibaba Group (Alipay, Taobao & Tmall)
- 360Buy.Jingdong Mail (360buy.com)
- Fan Ke Cheng Pin (Beijing) Technology Ltd (凡客诚品(北京)科技有限公司) (Fan Ke Cheng Pin)
- 58.com (58同城网)

### Automobilies
- Bayerische Motoren Werke AG (BMW)
- BYD Auto Co., Ltd (BYD)
- Honda Motor Co Ltd (Honda)
- Daimler AG (Mercedes-Benz)
- Nissan Motor Co Ltd (Nissan)
- Toyota Motor Corp (Toyota)
- Volkswagen AG (AUD, WM)

### Specialty Retail
- Cie Financiere Richemont SA (Cartier)
- Tiffany & Co
- Li Ning Company Ltd (Li Ning)
- Gore Electrical Appliances Holdings Ltd (Keime)
- Suning Appliance Company Ltd (Suning)
- Best Buy Co Inc
- Inter IKEA Systems B.V (IKEA)
- A.S. Watson Group (Hong Kong) Ltd (Watsons)

### Beverages
- The Coca-Cola Co (Coke, Minute Maid)
- PepsiCo Inc (Pepsi, Gatorade)
- Nestle SA (Nestle)
- Danone (Danone)
- Hangzhou Wahaha Group Co Ltd (Wahaha)
- Tingui (Cayman Islands) Holding Corp (Master Kang)

### Family & Fast/Casual Restaurants
- Bloomin Brands Inc (Outback Steakhouse)
- Ruby Tuesday Inc (Ruby Tuesday)
- UCC UESHIKA COFFEE CO. LTD (UCC Cafe)
- Breadtalk Group Ltd (Din Tai Fung, Toastbox)
- Yoshinoya Co., Ltd. (Yoshinoya)
- Sichuan Hutiaojiao Restaurant Holdings Ltd (海(海)脱颖而出的餐厅) (海(海)脱颖而出的餐厅) (Hutiaojiao)

### Life, Property, Health Insurance
- American International Assurance Company (Bloomtorial Holding Ltd) (AIA)
- Ping An Insurance (Group) Company (Ping An Insurance)
- Prudential Financial, Inc (Prudential)
- The China Life Insurance Company Limited (People’s Insurance Company of China Holdings Company (PICC))
- China Taiping Insurance Holding Company Ltd (China Taiping)
- China Pacific Insurance Group (CPIC)
## Company directory

### Germany

<table>
<thead>
<tr>
<th>Company Directory</th>
<th>Industry Sectors</th>
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<tbody>
<tr>
<td><strong>Internet Service Providers</strong></td>
<td>Technology, Public</td>
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<td>Deutsche Telekom AG (T-Online, T-Com, Conipost)</td>
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<td>Arcor AG (Vodafone)</td>
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<td>United Internet AG (1 &amp; 1, GMX, WEB.DE)</td>
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<td>Kabel Deutschland</td>
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<td>Unitymedia</td>
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<td>Free.net AG (mobilecom, Strato)</td>
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<tr>
<th><strong>Discount Retail</strong></th>
<th>Consumer Products &amp; Services, Healthcare</th>
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<tr>
<td>ALDI Einkauf GmbH &amp; Co. dKG (Aldi)</td>
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<td>NORMA WARENHANDELS GmbH (Norma)</td>
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<td>Netto Marken-Discount (Netto)</td>
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<th><strong>Pharmaceuticals</strong></th>
<th>Healthcare, Manufacturing &amp; Industrials</th>
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<td>Bayer Vital GmbH</td>
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<td>Lilly Deutschland GmbH (Eanaco)</td>
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<td>MSD Tiersgesundheit Internet Deutschland GmbH (Intervet)</td>
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<td>Novartis Tiersgesundheit GmbH (Novartis)</td>
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<th>Food &amp; Agriculture, Financial &amp; Professional Services</th>
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<tr>
<td>McDonald’s Corp</td>
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<td>Yumi Brands Inc (KFC, Pizza Hut)</td>
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<td>Burger King</td>
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<td>Doctor’s Associates Inc (Subway)</td>
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<td>MoschMosch GmbH</td>
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<td>Dr. Oetker</td>
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<td>Kraft Foods Inc</td>
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<td>Bahlsen GmbH &amp; Co. KG</td>
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<td>Kellogg Co</td>
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<tr>
<th><strong>Smartphones</strong></th>
<th>Internet Service Providers, Software, Tablets &amp; E-Readers, On-Line Shopping, Specialty Retail, Family &amp; Fast/Casual Restaurants, Life, Property, Health Insurance</th>
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<tbody>
<tr>
<td>Apple Inc (iPhone)</td>
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<td>Google Inc (Android)</td>
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<td>HTC Corporation (HTC)</td>
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<td>LG Electronics Inc</td>
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<td>Motorola Inc</td>
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<td>Nokia OYJ</td>
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<td>Research in Motion (Blackberry)</td>
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<td>Samsung Electronics (Samsung Galaxy)</td>
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<tr>
<th><strong>Major Appliances</strong></th>
<th>Major Appliances, Specialty Retail, Family &amp; Fast/Casual Restaurants, Life, Property, Health Insurance</th>
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<tbody>
<tr>
<td>Electrolux (AEG)</td>
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<tr>
<td>Whirlpool Corp (Bauknecht, Kicherer)</td>
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<tr>
<td>BSH Bosch und Siemens Hausgeräte GmbH (Bosch, Gaggenau, NEFF)</td>
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<td>Maier &amp; Co. KG (Miele)</td>
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<td>Philips</td>
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<tr>
<th><strong>Automobiles</strong></th>
<th>Manufacturing &amp; Industrials, Financial &amp; Professional Services, Energy, Speciality Retail, Life, Property, Health Insurance</th>
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<tr>
<td>Bayerische Motoren Werke AG (BMW)</td>
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<td>Toyota Motor Corp</td>
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<td>Fiat</td>
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<td>General Motors (Opel)</td>
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<td>Ford Motor Co</td>
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<td>Volkswagen AG (Audi, WM)</td>
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<th><strong>Packaged Foods</strong></th>
<th>Food &amp; Agriculture, Financial &amp; Professional Services, Energy, Speciality Retail, Life, Property, Health Insurance</th>
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<tbody>
<tr>
<td>Lorenz Snack World</td>
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<td>Funny-Trisch</td>
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<td>Adobe Systems Inc (Adobe)</td>
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<table>
<thead>
<tr>
<th><strong>Energy</strong></th>
<th>Financial &amp; Professional Services, Energy, Speciality Retail, Life, Property, Health Insurance</th>
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<tbody>
<tr>
<td>BP</td>
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<tr>
<td>Exxon Mobil</td>
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<tr>
<td>Shell</td>
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<tr>
<td>RWE, DEA</td>
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<td>Wintershall</td>
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<tr>
<td>OMV</td>
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<tr>
<td>Primagaz</td>
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<td>Gazprom Germania</td>
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<table>
<thead>
<tr>
<th><strong>Banking &amp; Investing</strong></th>
<th>Financial &amp; Professional Services, Energy, Speciality Retail, Life, Property, Health Insurance</th>
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<tbody>
<tr>
<td>Deutsche Bank AG</td>
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<tr>
<td>Commerzbank AG</td>
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<tr>
<td>KFW (KfW Bankengruppe)</td>
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<tr>
<td>Regional Savings Banks*</td>
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<tr>
<td>DZ Bank AG</td>
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<tr>
<td>HSBC Holdings plc (HSBC Trinkaus &amp; Burkhardt)</td>
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<tr>
<td>ING Groep NV (ING-Diba)</td>
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<tr>
<td>UBS AG</td>
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<table>
<thead>
<tr>
<th><strong>Life, Property, Health Insurance</strong></th>
<th>Financial &amp; Professional Services, Energy, Speciality Retail, Life, Property, Health Insurance</th>
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<tbody>
<tr>
<td>Allianz SE (Allianz Versicherungen)</td>
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<tr>
<td>Zurich Gruppe Deutschland (Zurich Deutscher Herold)</td>
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<tr>
<td>Lebenversicherung AG</td>
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<tr>
<td>R+V Versicherung AG (R+V)</td>
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<tr>
<td>Generali Holding Deutschland AG (Generali, Aachen-Münchener)</td>
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<tr>
<td>Munich Re (Münchener Rückversicherungs-Gesellschaft AG) (Ergo Leben)</td>
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<td>Debeka</td>
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<tr>
<td>Sparkassen Finanzgruppe (Versicherungskammer Bayern)</td>
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</tr>
</tbody>
</table>

### Industry Sectors

- Technology
- Public
- Consumer Products & Services
- Healthcare
- Manufacturing & Industrials
- Financial & Professional Services
- Food & Agriculture
- Energy & Utilities

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**Internet Service Providers**

- Deutsche Telekom AG (T-Online, T-Com, Conipost)
- Arcor AG (Vodafone)
- United Internet AG (1 & 1, GMX, WEB.DE)
- 02
- Kabel Deutschland
- Unitymedia
- Free.net AG (mobilecom, Strato)

**Discount Retail**

- ALDI Einkauf GmbH & Co. dKG (Aldi)
- Schwarz Gruppe (LiSat)
- REWE Group (Penny)
- NORMA WARENHANDELS GmbH (Norma)
- Netto Marken-Discount (Netto)

**Pharmaceuticals**

- Bayer Vital GmbH
- Merial GmbH
- Pfizer GmbH
- Boehringer Ingelheim Vetmedica GmbH (Vetmedica)
- Lilly Deutschland GmbH (Eanaco)
- MSD Tiersgesundheit Internet Deutschland GmbH (Intervet)
- Novartis Tiersgesundheit GmbH (Novartis)

**Fast Food Restaurants**

- McDonald’s Corp
- Yumi Brands Inc (KFC, Pizza Hut)
- Burger King
- Doctor’s Associates Inc (Subway)
- MoschMosch GmbH
- Dr. Oetker
- Kraft Foods Inc
- Bahlsen GmbH & Co. KG
- Leibniz
- Kellogg Co

**Smartphones**

- Apple Inc (iPhone)
- Google Inc (Android)
- HTC Corporation (HTC)
- LG Electronics Inc
- Motorola Inc
- Nokia OYJ
- Research in Motion (Blackberry)
- Samsung Electronics (Samsung Galaxy)

**Major Appliances**

- Electrolux (AEG)
- Whirlpool Corp (Bauknecht, Kicherer)
- BSH Bosch und Siemens Hausgeräte GmbH (Bosch, Gaggenau, NEFF)
- Maier & Co. KG (Miele)
- Philips

**Automobiles**

- Bayerische Motoren Werke AG (BMW)
- Toyota Motor Corp
- Fiat
- Daimler AG (Mercedes-Benz)
- General Motors (Opel)
- Ford Motor Co
- Volkswagen AG (Audi, WM)

**Packaged Foods**

- Lorenz Snack World
- Funny-Trisch
- Neufå
- Dr. Oetker
- Kraft Foods Inc
- Bahléen GmbH & Co. KG
- Leibniz
- Kellogg Co

**Software**

- Adobe Systems Inc (Adobe)
- Autodesk Inc (AutoCAD)
- Google Inc (Google Docs)
- McAfee Inc
- Microsoft Corp (Office, Windows)
- Salesforce.com Inc
- Symantec Inc (Norton)

**On-Line Shopping**

- Amazon.com Inc
- Apple Inc (iTunes)
- eBay Inc (eBay, PayPal)

**Shipping & Logistics**

- Deutsche Post AG (Deutsche Post DHL)
- FedEx Corporation
- United Parcel Service Inc
- UPS
- TNT
- Hermes

**Energy**

- BP
- Exxon Mobil
- Shell
- RWE, DEA
- Wintershall
- OMV
- Primagaz
- Gazprom Germania

**Banking & Investing**

- Deutsche Bank AG
- Commerzbank AG
- KFW (KfW Bankengruppe)
- Regional Savings Banks*
- DZ Bank AG
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- ING Groep NV (ING-Diba)
- UBS AG

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- Allianz SE (Allianz Versicherungen)
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- Generali Holding Deutschland AG (Generali, Aachen-Münchener)
- Munich Re (Münchener Rückversicherungs-Gesellschaft AG) (Ergo Leben)
- Debeka
- Sparkassen Finanzgruppe (Versicherungskammer Bayern)
The ability to identify ‘Expert Consumers’ from the general population was developed by Lepere Analytics. The methodology is US Patent Pending.

Polling is conducted online for Lepere Analytics by Ipsos – the world’s third largest research company with operations in 84 countries. Online panels are in compliance with International quality standards ESOMAR and AIMRI and certified on key ISO standards.

The following metrics and definitions were used in the analysis of the data:

**Authenticity momentum**
A net score based on the % of people who say a company is gaining ground minus the % who say it is losing ground.

**Authenticity gap**
The gap between peoples’ expectations of the category and their experience of the company (or brand).

**Expectations and experience**
Expectations are specific to the category and experience is specific to an individual company (or brand). Each is based on a separate ranking of the authenticity drivers from 1 to 9.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total sample</th>
<th>US</th>
<th>Germany</th>
<th>China</th>
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<tbody>
<tr>
<td><strong>Fieldwork dates</strong></td>
<td></td>
<td>15th - 22nd October 2012</td>
<td>23rd - 29th October 2012</td>
<td>24th - 30th October 2012</td>
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<tr>
<td><strong>Category</strong></td>
<td>Sample %</td>
<td>Sample %</td>
<td>Sample %</td>
<td>Sample %</td>
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<tr>
<td>Automobiles</td>
<td>101 10%</td>
<td>89 9%</td>
<td>116 11%</td>
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<tr>
<td>Banking &amp; Investing</td>
<td>97 9%</td>
<td>136 14%</td>
<td>114 11%</td>
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<tr>
<td>Beverages</td>
<td>100 10%</td>
<td>87 9%</td>
<td>73 7%</td>
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<tr>
<td>Discount Retail</td>
<td>130 13%</td>
<td>92 9%</td>
<td>67 7%</td>
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<tr>
<td>Energy</td>
<td>164 16%</td>
<td>164 16%</td>
<td>115 11%</td>
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</tr>
<tr>
<td>Family &amp; Fast/Casual Restaurants</td>
<td>132 13%</td>
<td>74 7%</td>
<td>111 11%</td>
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</tr>
<tr>
<td>Fast Food Restaurants</td>
<td>94 9%</td>
<td>51 5%</td>
<td>32 3%</td>
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<tr>
<td>Internet Service Providers</td>
<td>98 10%</td>
<td>95 9%</td>
<td>116 11%</td>
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</tr>
<tr>
<td>Life, Property, Health Insurance</td>
<td>153 15%</td>
<td>95 9%</td>
<td>177 17%</td>
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<tr>
<td>Major Appliances</td>
<td>82 8%</td>
<td>138 14%</td>
<td>143 14%</td>
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<tr>
<td>On-line Shopping</td>
<td>150 15%</td>
<td>131 13%</td>
<td>151 15%</td>
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<tr>
<td>Packaged Foods</td>
<td>96 9%</td>
<td>97 10%</td>
<td>51 5%</td>
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<tr>
<td>Pharmaceuticals</td>
<td>88 9%</td>
<td>83 8%</td>
<td>60 6%</td>
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<tr>
<td>Shipping &amp; Logistics</td>
<td>38 4%</td>
<td>50 5%</td>
<td>53 5%</td>
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<tr>
<td>Smartphones</td>
<td>114 11%</td>
<td>104 10%</td>
<td>138 14%</td>
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<td>Software</td>
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<td>131 13%</td>
<td>141 14%</td>
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<tr>
<td>Specialty Retail</td>
<td>97 9%</td>
<td>74 7%</td>
<td>37 4%</td>
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<tr>
<td>Tablets &amp; E-Readers</td>
<td>97 9%</td>
<td>87 9%</td>
<td>119 12%</td>
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<tr>
<td>Vacation &amp; Travel</td>
<td>132 13%</td>
<td>113 11%</td>
<td>132 13%</td>
<td></td>
</tr>
<tr>
<td>Wireless Carriers</td>
<td>117 11%</td>
<td>95 9%</td>
<td>66 7%</td>
<td></td>
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</tbody>
</table>
Fleishman Authenticity Guides are published bi-annually based on on-going online polling in 8 sectors and 40 categories. The methodology is proprietary to Fleishman-Hillard and Lepere Analytics.

Fleishman-Hillard Inc., one of the world’s leading strategic communications firms, has built its reputation on creating integrated solutions that deliver what its clients value most: meaningful, positive and measurable impact on the performance of their organizations. The firm is widely recognized for excellent client service and a strong company culture founded on teamwork, integrity and personal commitment. Based in St. Louis, the firm operates throughout North America, Europe, Asia Pacific, Middle East, Africa and Latin America through its 80 owned offices. For more information, visit the Fleishman-Hillard website at www.fleishmanhillard.com.

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Lepere Analytics is an independent research firm whose data forecasts company reputation and revenue. The methodology is US Patent Pending, is independently validated and is used by Wall Street investment analysts and portfolio managers.

Lepere Analytics was founded in 2007. It is a privately held company, registered in the UK with partners based in London and New York.

Polling is conducted for Lepere Analytics by Ipsos – the world’s third largest research company with operations in 84 countries. Online panels are in compliance with International quality standards ESOMAR and AIMRI and certified on key ISO standards.