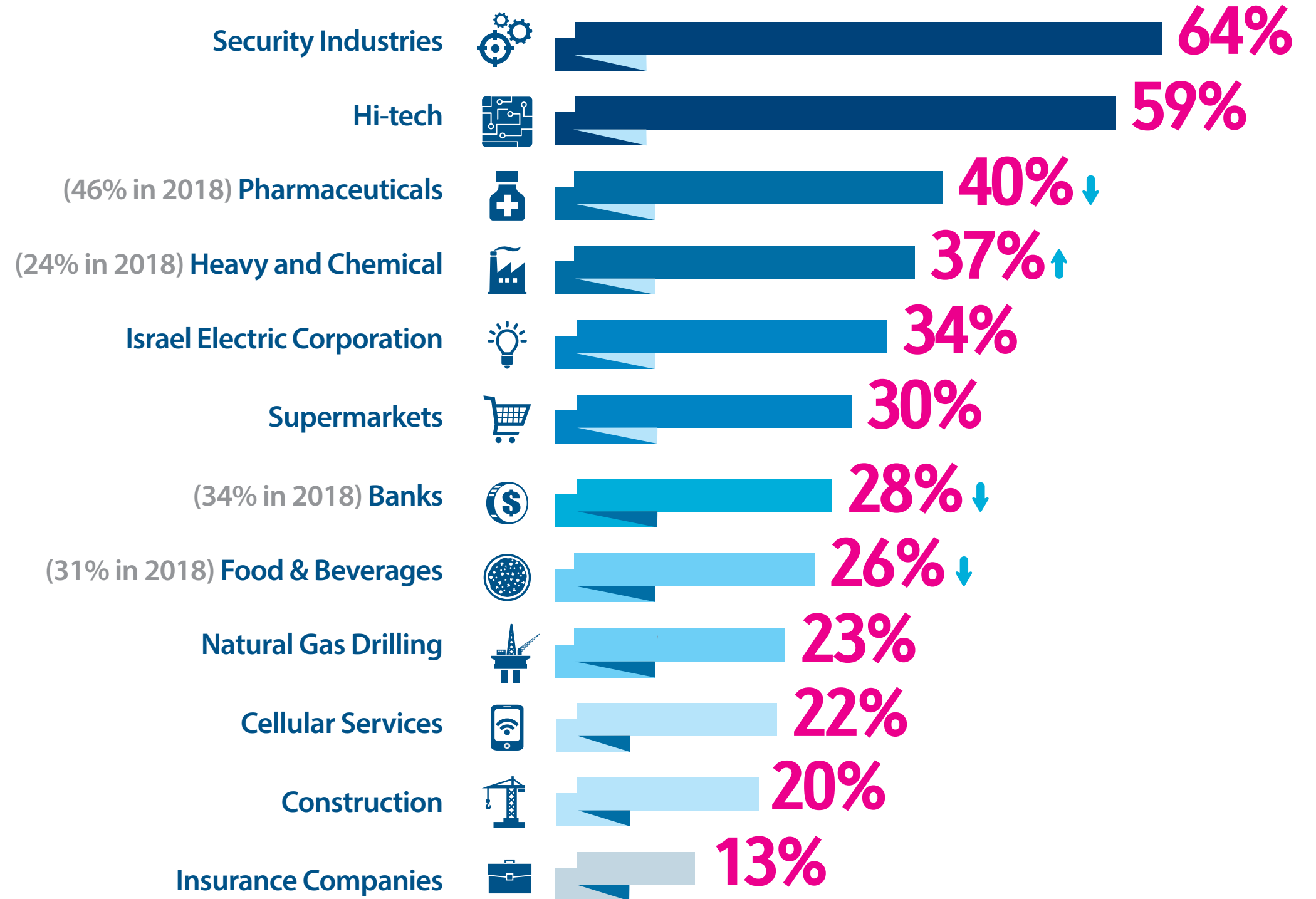


The Social License to Operate of Businesses in Israel

Maala - GlobeScan Radar 2019

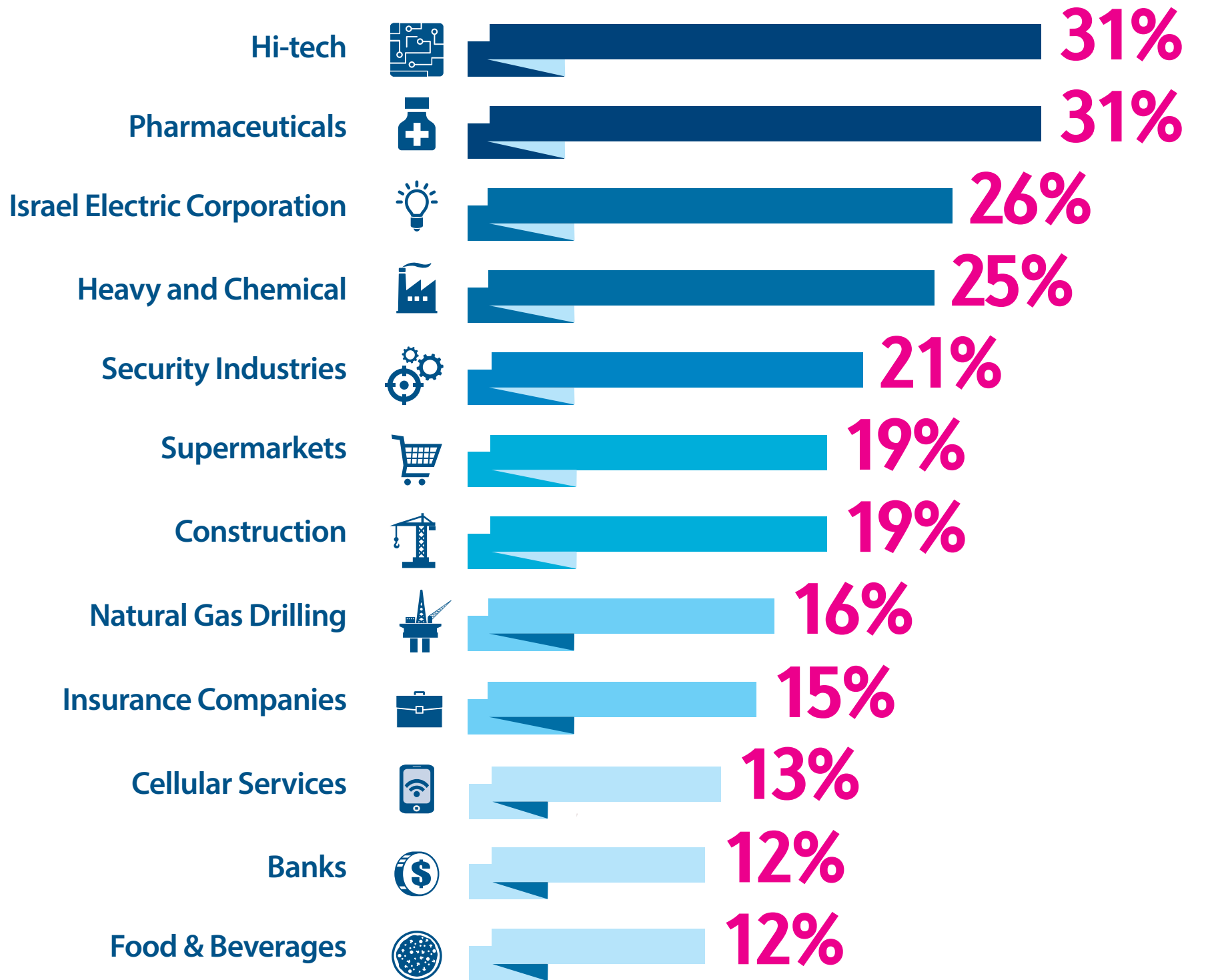


What is the level of trust in companies from different business sectors?

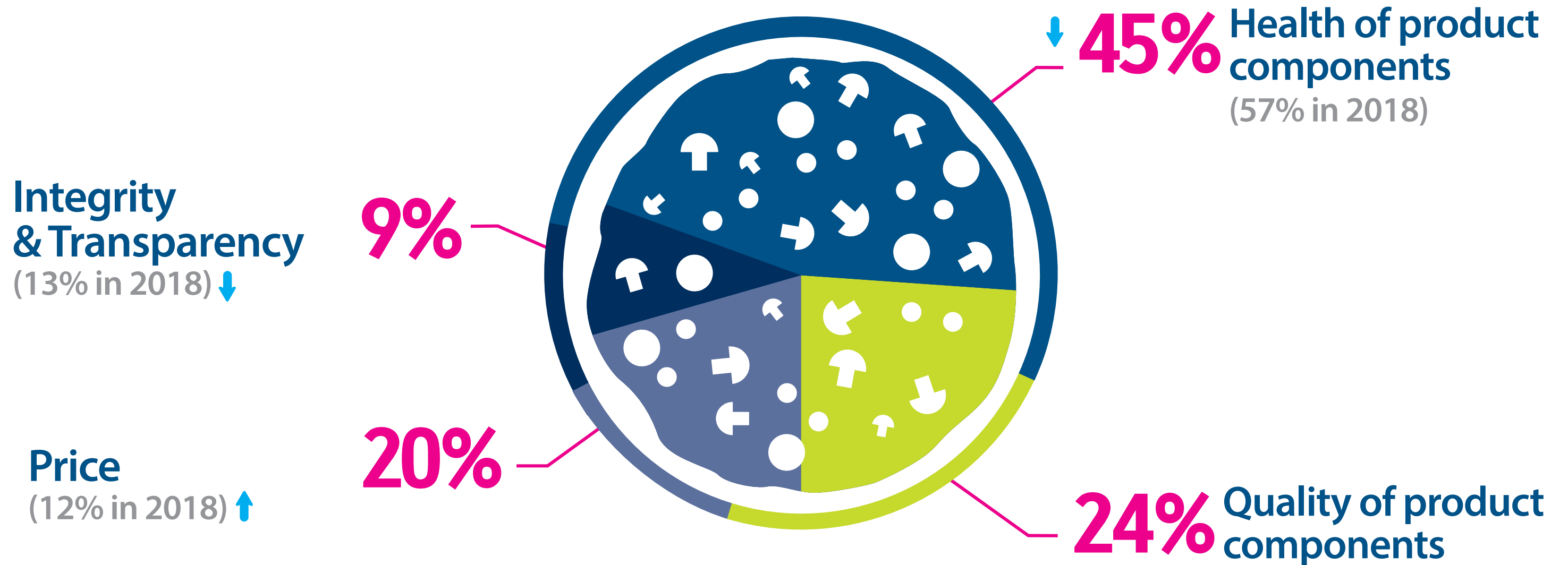


What is the level of trust in companies from different business sectors?

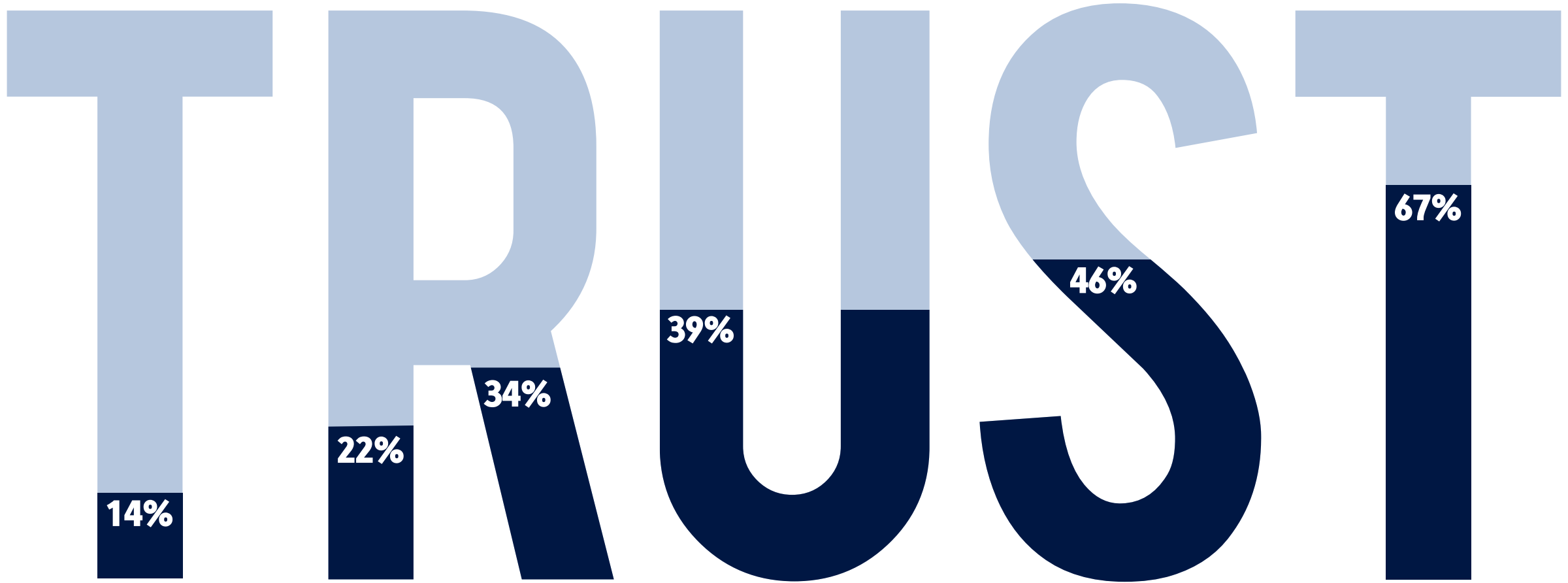
Respondents from the Israeli Arab community



What are the essential issues in the food and beverage sector?



What is the level of trust in various institutions?



UN

Media and the press
↓ (33% in 2018)

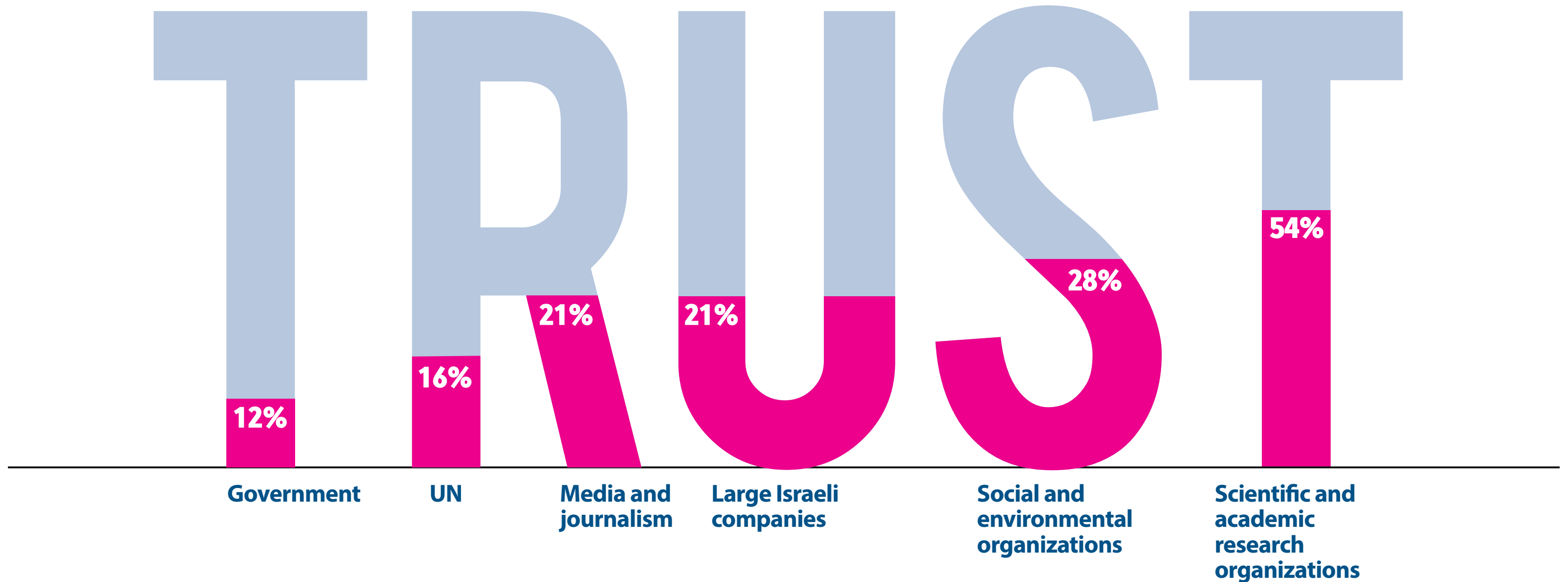
Government
↓ (40% in 2018)

Large Israeli companies
↓ (49% in 2018)

Social and environmental organizations
↓ (67% in 2018)

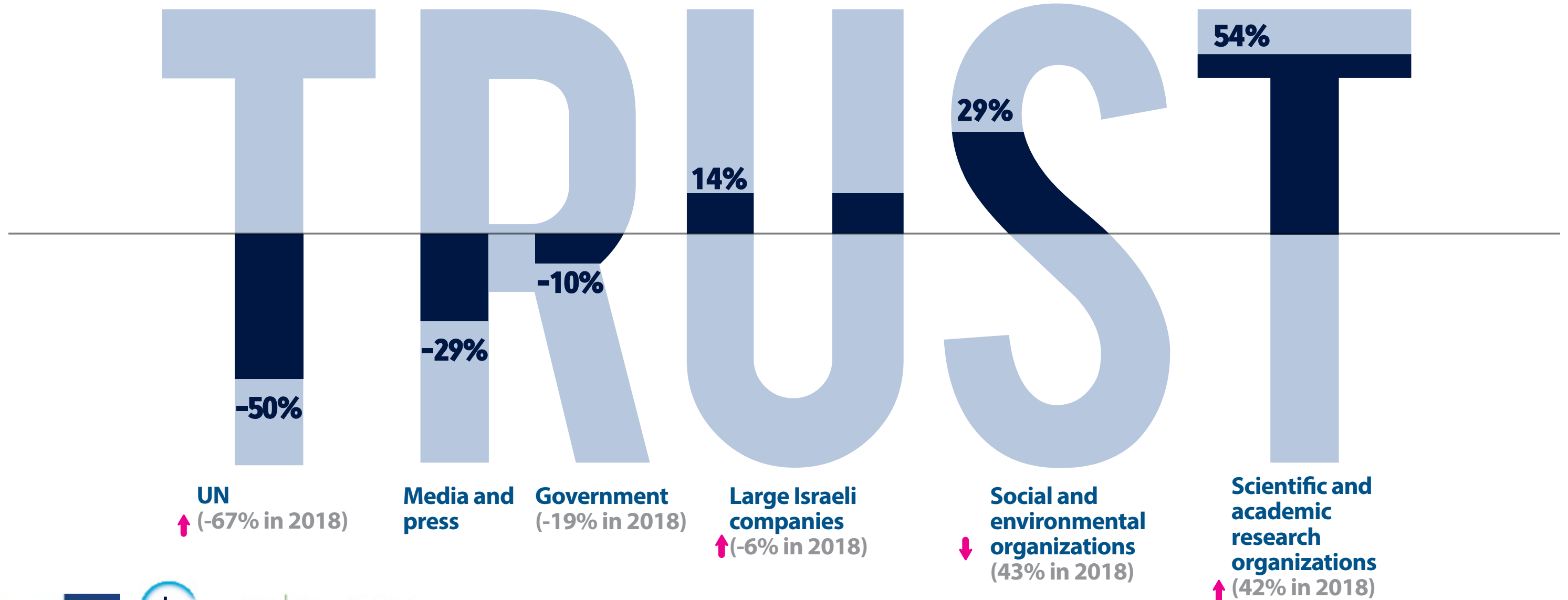
Scientific and academic research organizations

What is the level of trust in various institutions? Respondents from the Israeli Arab community

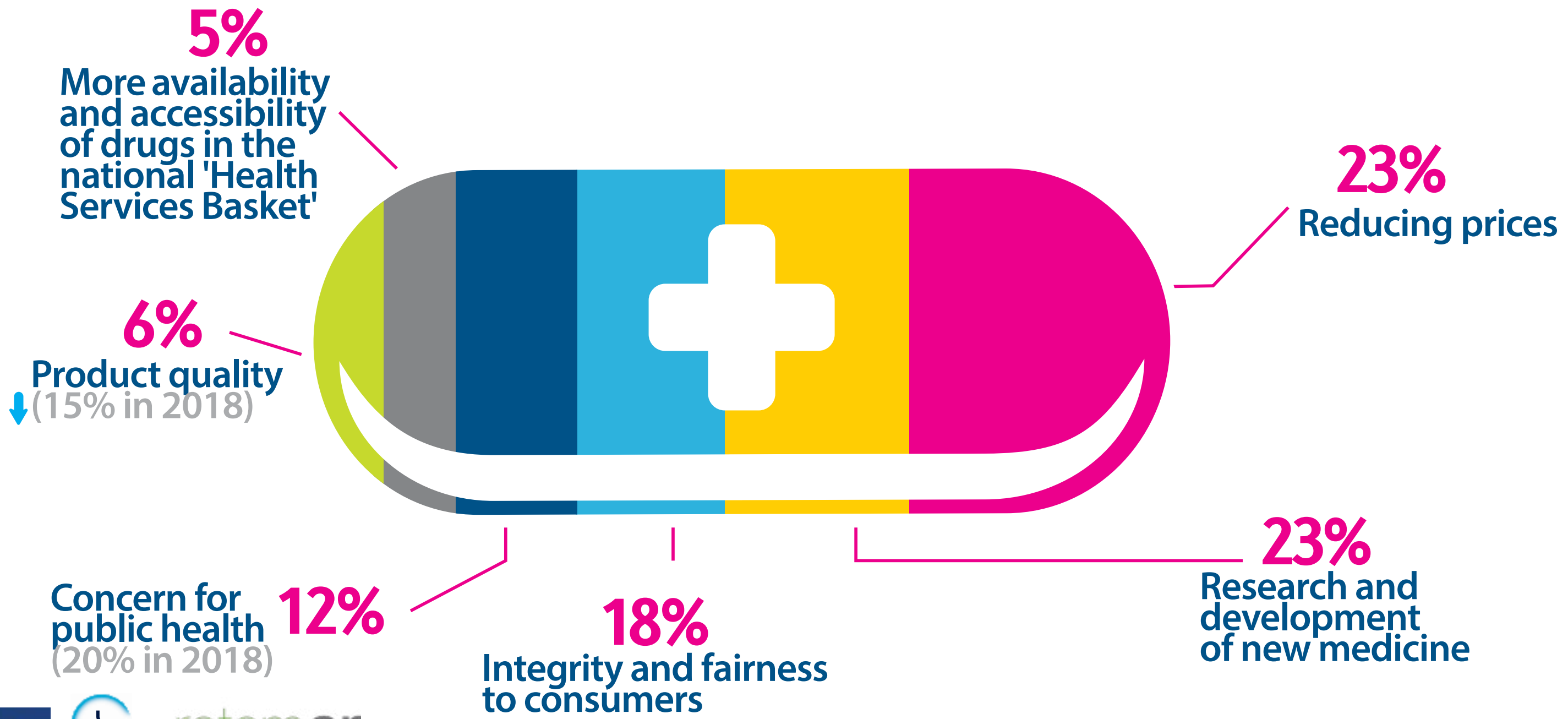


Net Trust:

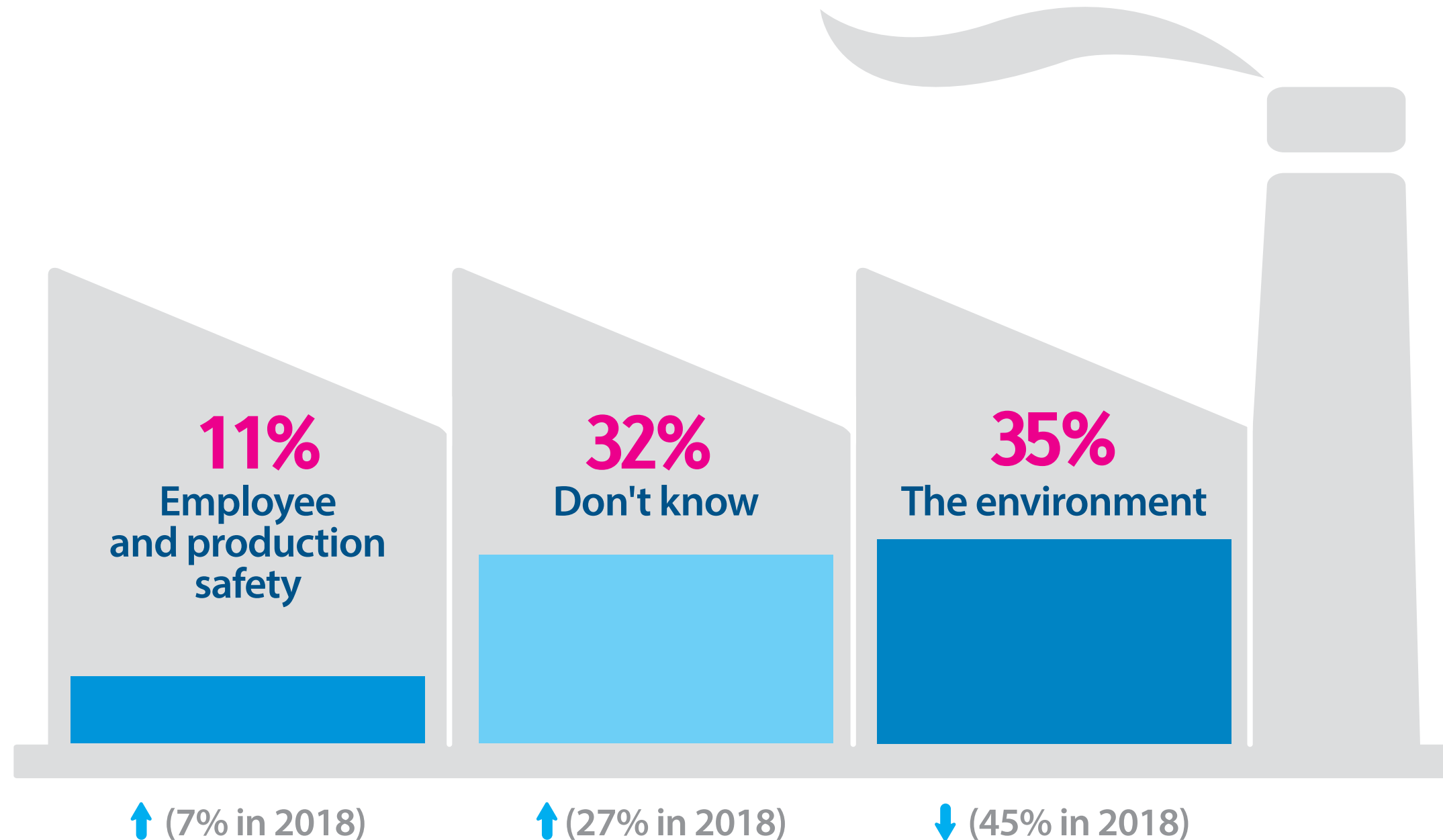
The difference between those who trust and those who do not



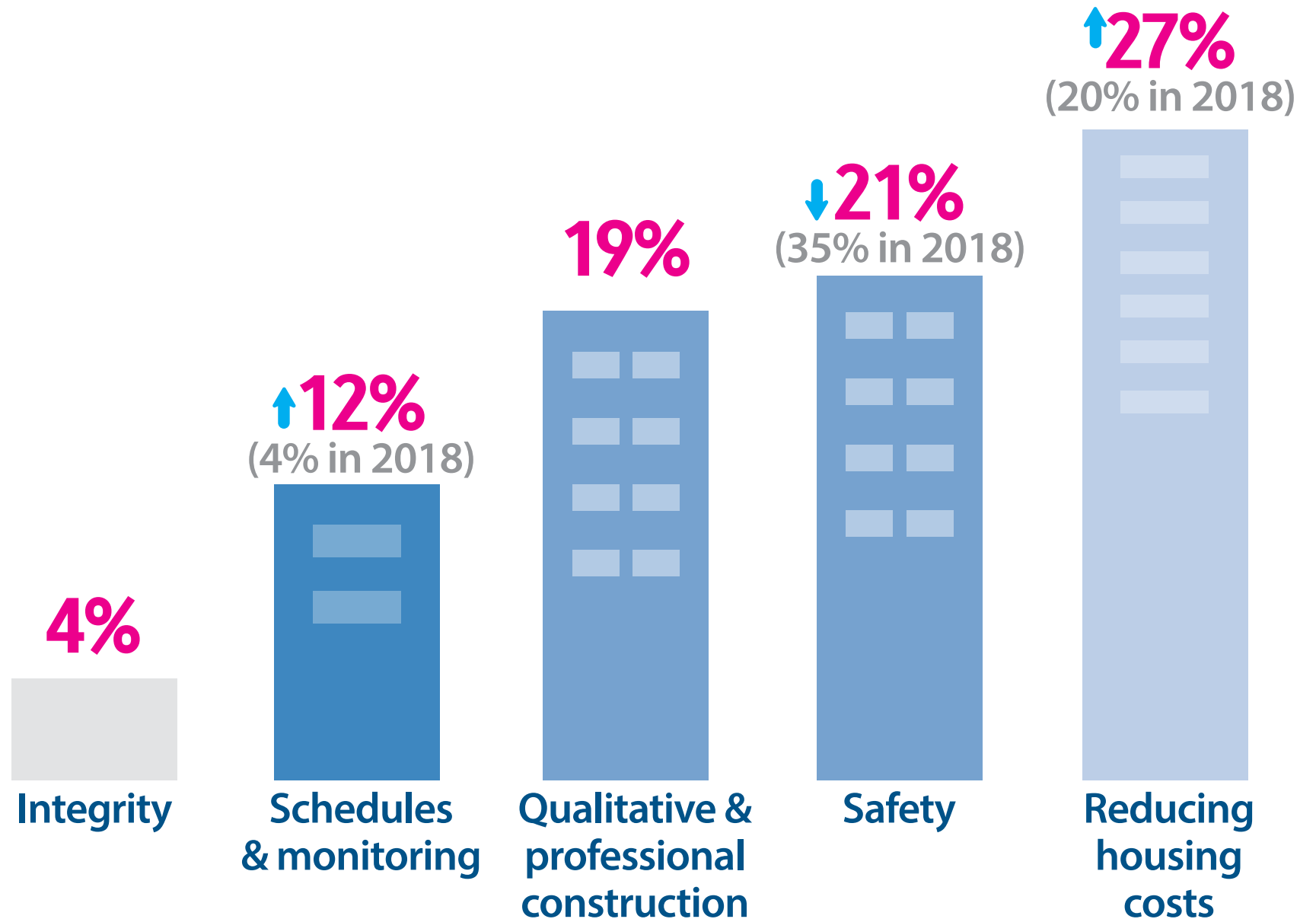
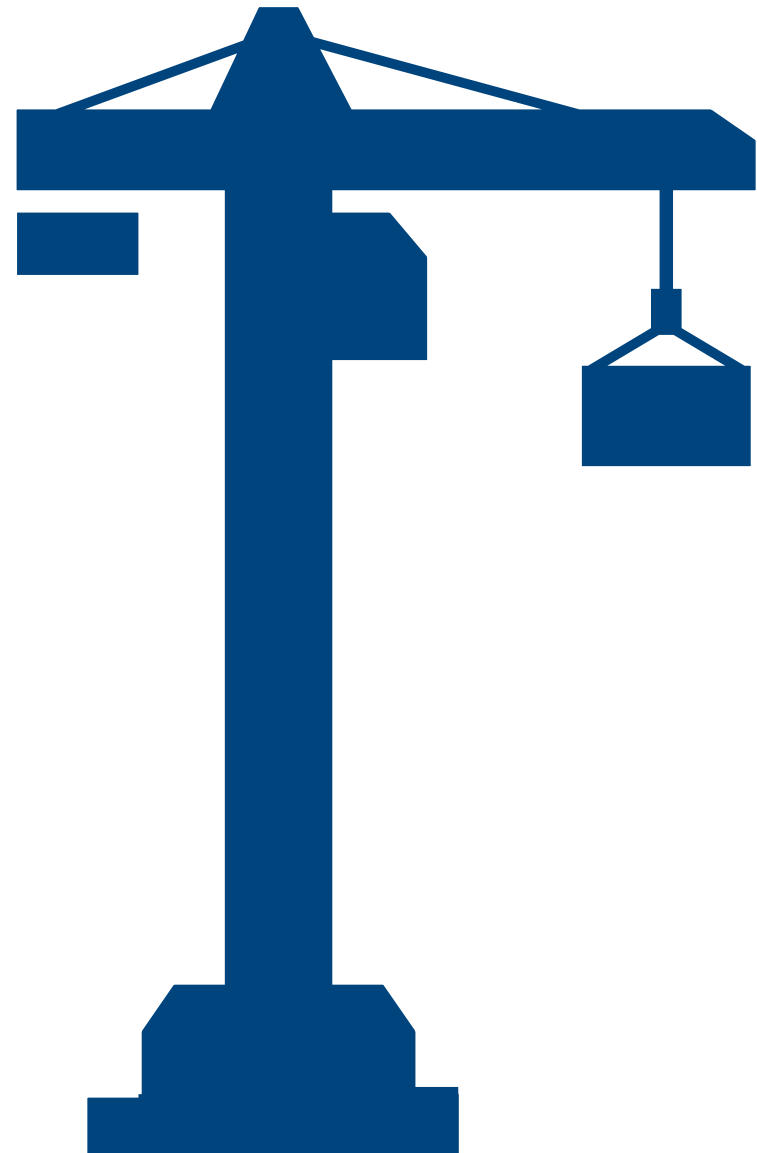
What are the essential issues in the pharmaceutical sector?



What are the essential issues in the heavy and chemical industries sector?



What are the essential issues in the construction sector?



What are the essential issues in the hi-tech sector?

Employment under fair conditions
Reducing working hours

Employment of women, older people, Ultra Orthodox, people with disabilities etc.

Entrepreneurship and creating jobs in Israel

Israel's international status

4%



— 25%

Answered they don't know

— 13%

Strengthening technological knowledge and education

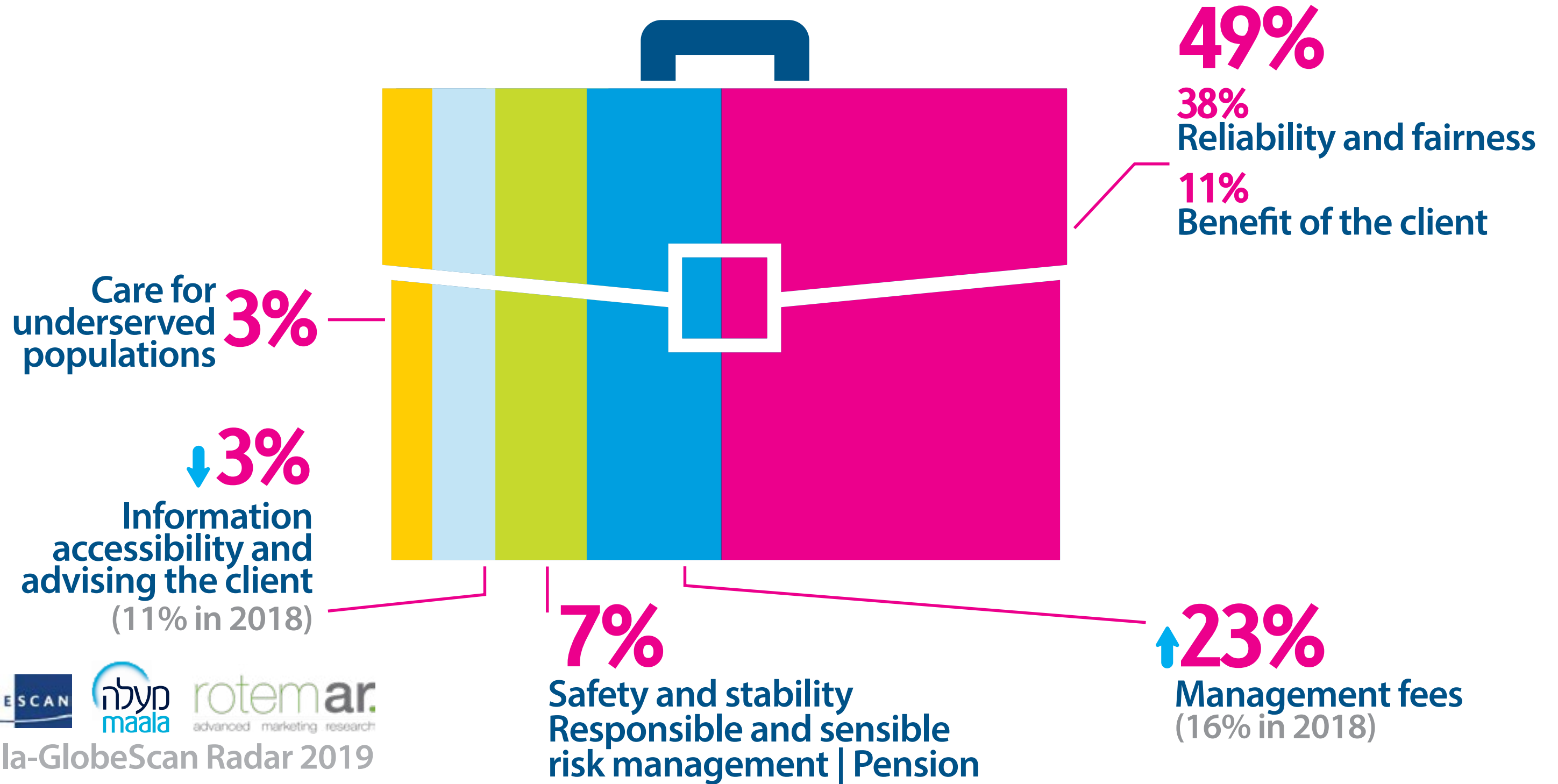
— 9% ↓

Developments for quality of life and security (24% in 2018)

— 7%

Information security
Products reliability

What are the essential issues in the insurance sector?



What are the essential issues in the cellular sector?

Transmission quality **13%**

Radiation and the environment **7%**



28% Service costs
and product prices

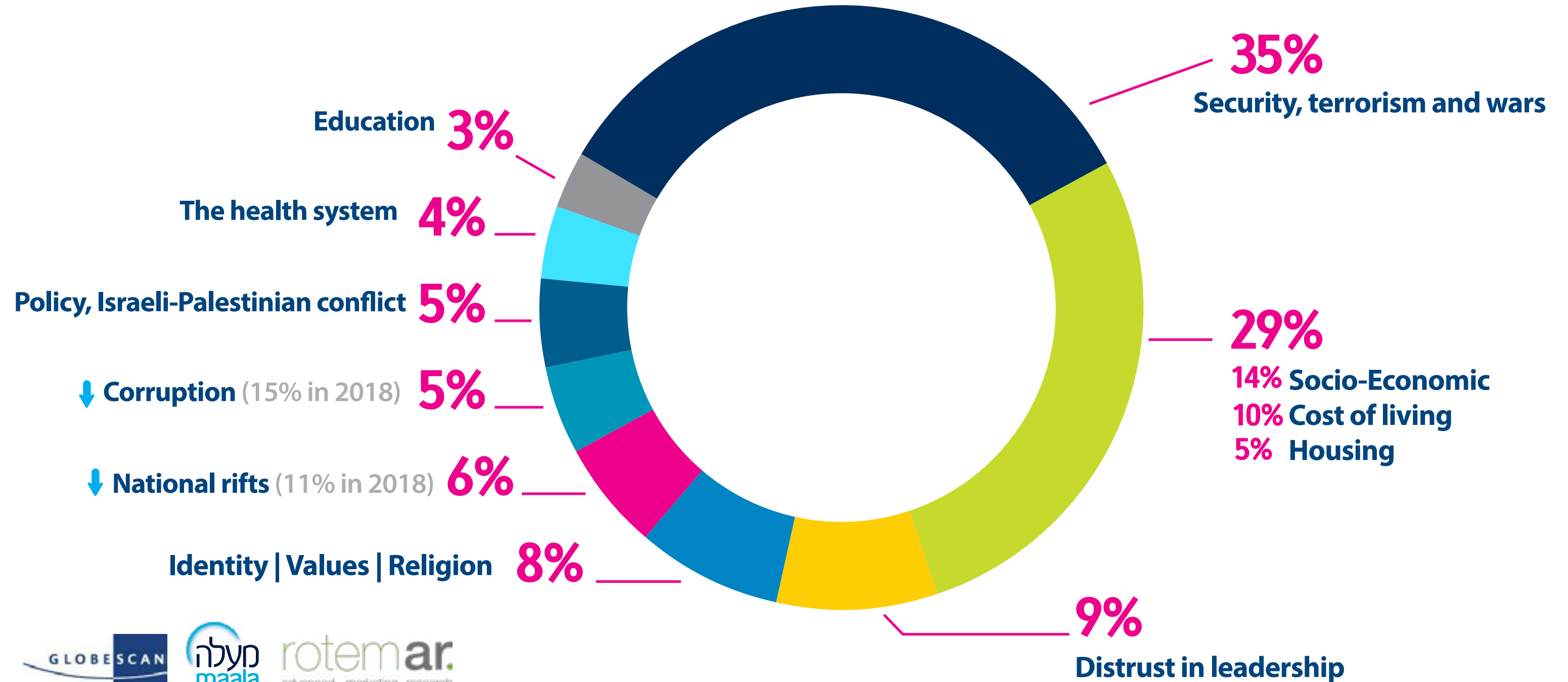
18% Customer service
Technical support

17% Integrity and fairness
Pro-customer offers

What are the essential issues in retail chains?

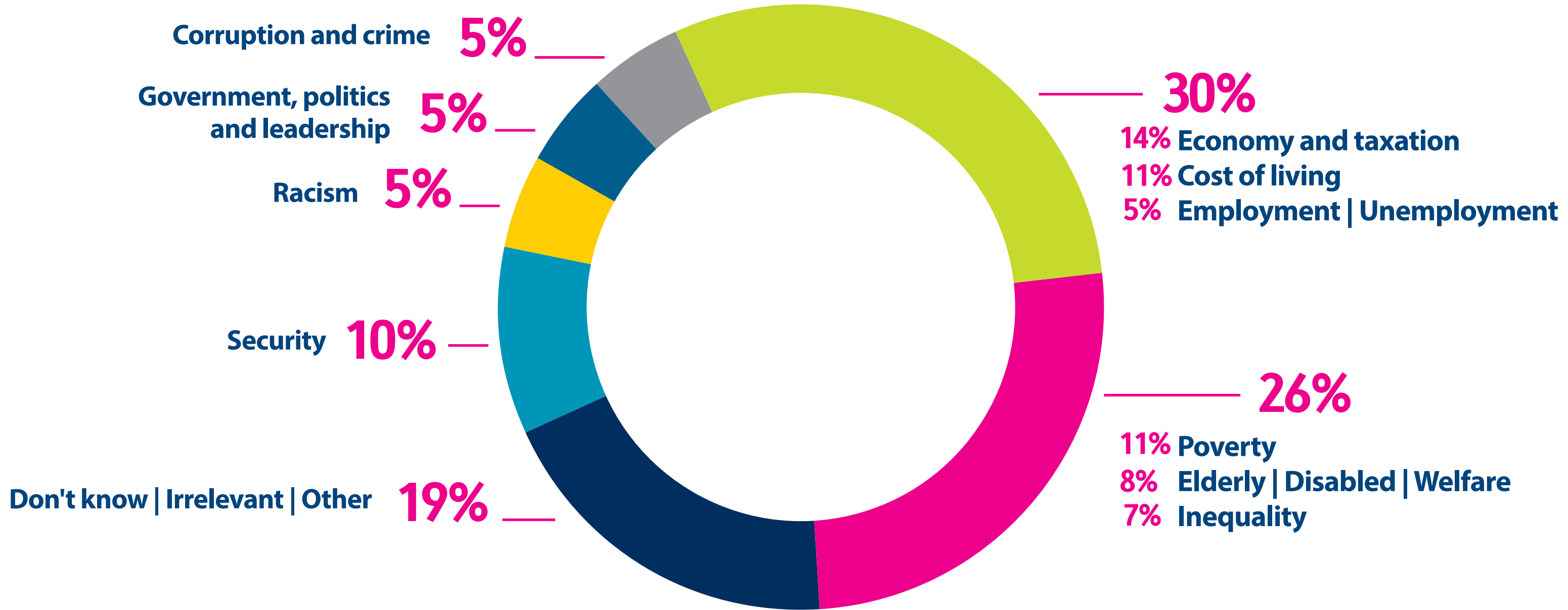


What are the significant issues facing the State of Israel?



What are the significant issues facing the State of Israel?

Respondents from the Israeli Arab community



What increases the trust of consumers in banks?



The bank takes responsibility for mishaps and issues caused by its services

Banks are presently more attentive to public opinion than in recent years

The fees charged to customers' accounts are fair (commissions)

The bank assists customers encountering financial difficulties

Issues that do not affect the trust of consumers in banks

The bank donates to the community and non-profit organizations

The bank usually employs workers from all sectors of society in its branches

The bank helps its clients learn sensible economic conduct

The bank helps small businesses succeed

The bank treats its employees fairly

The branch location is convenient for me

The bank is available for its customers when needed

My bank doesn't goad me to take its loans

What increases the trust of consumers in banks?



The bank takes responsibility for mishaps and issues caused by its services

Banks are presently more attentive to public opinion than in recent years

The fees charged to customers' accounts are fair (commissions)

The bank assists customers encountering financial difficulties

What increases the trust of consumers in food producers?



Transparency and the completeness of information about the product

Responsible advertising for children

The company's contributions to the community and non-profit organizations

Product quality

Issues that do not affect the trust of consumers in food producers

Reducing sugar and sodium components in products

Availability of diverse food for specific populations

Taking responsibility for product mishaps

Ensuring products have healthy components

Fair wages for employees

Information about maintaining a healthy lifestyle

What increases the trust of consumers in food producers?



Transparency and the completeness of information about the product

Responsible advertising for children

The company's contributions to the community and non-profit organizations

Product quality

What increases the trust of consumers in supermarkets?



Fair product prices

Pleasant shopping experience

Truth in advertising

Issues that do not affect the trust of consumers in supermarkets

Collaborations with social and environmental organizations to promote social causes

Ensuring that fruit and vegetables are sold fresh and good-looking

Taking responsibility for service mishaps

Ensuring prices noted on shelves match prices charged at checkout

Fair wages to employees

The chain treats its suppliers fairly

Supermarket branch is located conveniently for the consumer

Staff courtesy

Selling high quality meats

What increases the trust of consumers in supermarkets?



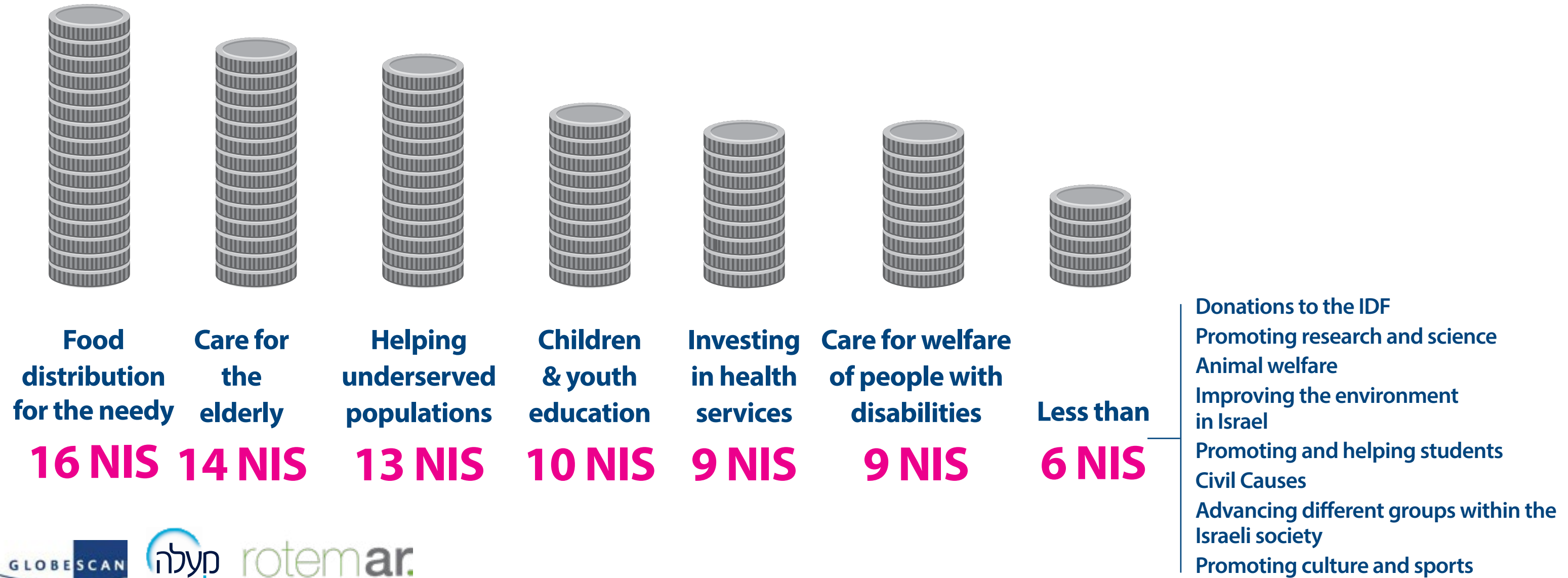
Fair product prices

Pleasant shopping experience

Truth in advertising

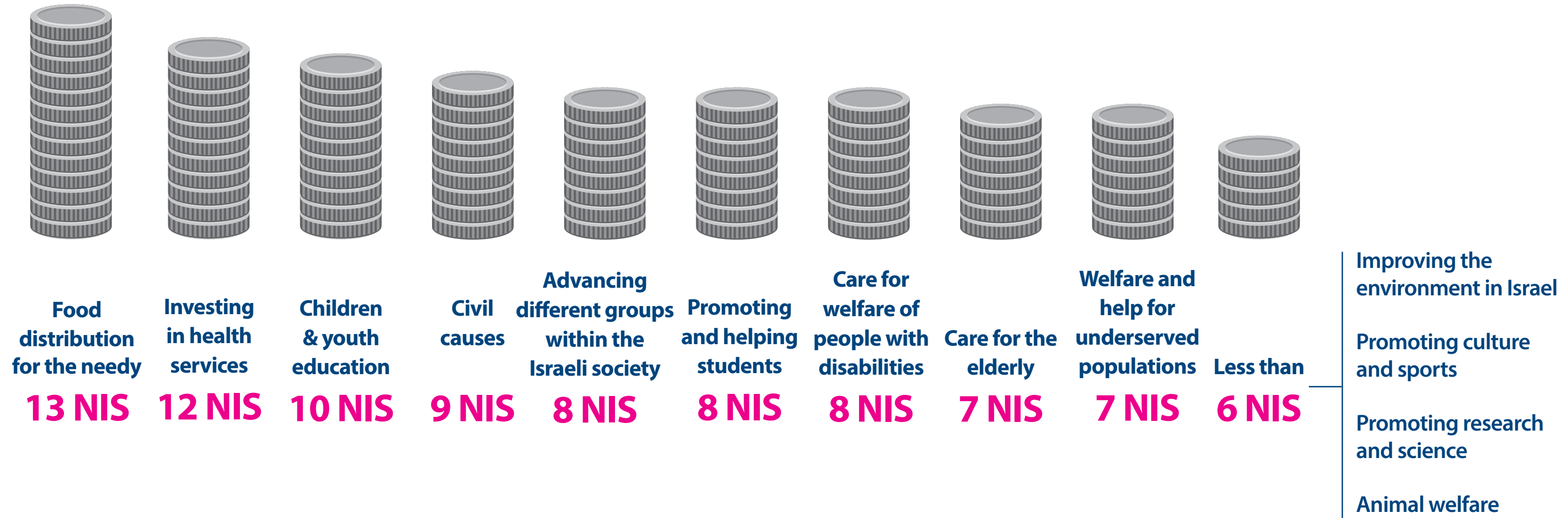
Which causes would you donate to?

How would you distribute NIS 100?



Which causes would you donate to? How would you distribute NIS 100?

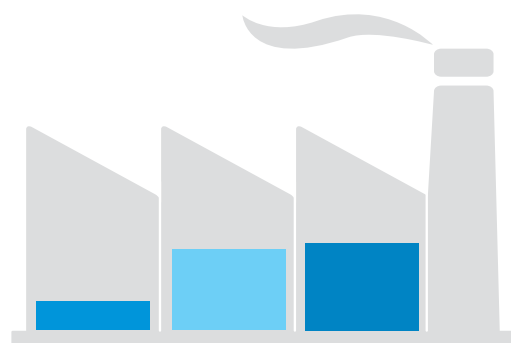
*Respondents from the Israeli Arab community



The essential issues in different sectors



Construction



**Heavy and
chemical industries**



Pharmaceuticals



**Food &
beverages**



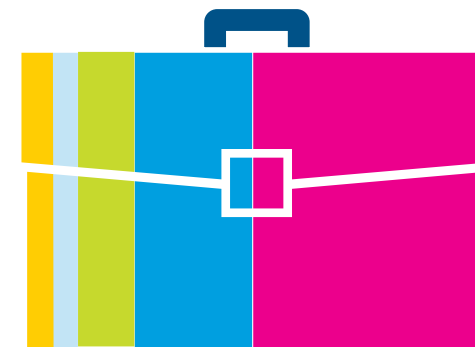
Banking



Retail chains



Cellular services



Insurance



Hi-tech