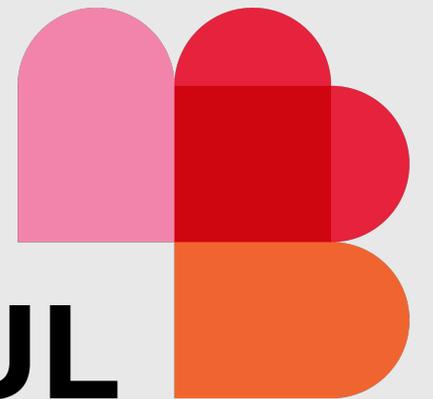


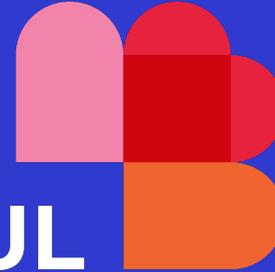
I IAVAS
GROUP

**MEANINGFUL
BRANDS 2021**





MEANINGFUL BRANDS



Twelve Year study exploring how brands tangibly improve peoples' lives functionally, enhance their personal well-being, and contribute to wider society.

The Meaningful Brands Study is unique within the industry

1

Dating from 2009, was the **FIRST GLOBAL FRAMEWORK** to connect brands with human well-being

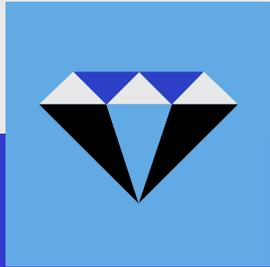
2

Explores **PROPRIETARY METRIC** of brand strength for business and marketing planning

3

Helps us identify how and where to **MEANINGFULLY ENGAGE** with people through customer, brand and media experiences

Why the Study Matters Now More than Ever



In current landscape, consumers and society expect more **long-term value** from businesses and brands



After almost 50 years, Davos Manifesto was updated, emphasizing the responsibility for businesses to be **stewards of the planet and all people**



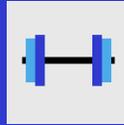
The idea of **stakeholder capitalism** is growing in momentum

A Tangible Definition of 'Meaningful'

Understanding what matters across 3 pillars and 14 dimensions

PERSONAL BENEFITS

Messaging and behavior that connects on an individual basis and serves a specific personal need or want



PHYSICAL



ORGANISATIONAL



FINANCIAL



INTELLECTUAL



SOCIAL



EMOTIONAL



NATURAL

COLLECTIVE BENEFITS

Company initiatives, behaviors, and actions that respond to and connect at the social and cultural level



ECONOMY



EMPLOYER



ETHICS



GOOD LIVING



ENVIRONMENT



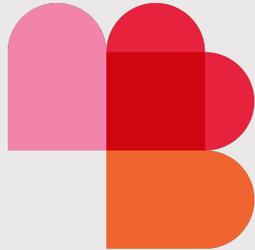
SOCIAL JUSTICE

FUNCTIONAL BENEFITS

Rational benefits focused on product functionality, customer service, interactivity, and technology



FUNCTIONAL



Brands are measured against specific attributes – *pertinent to their category* - within each pillar



FUNCTIONAL

How the product or service delivers

- Banking app
- Best Camera
- Clear Info
- Comfortable clothes
- Compatibility
- Data privacy
- Delivers
- Designs
- Digital experience
- Easy journey
- Easy returns
- Easy Switch
- Exclusive exp.
- Fair Prices
- Fix cuts
- Handling
- Handset Change
- Helpful Staff
- In charge
- In store experience
- Inclusive Collection
- Innovative
- Interactions
- Leader
- Multisensory
- Price's consistency
- Proactive
- Quality Prods
- Range
- Respect
- Safe & Responsible
- Safety features
- Scents
- Tariffs Range
- Technology-driven
- Tools & services
- Unique
- Upright
- Quality brands



PERSONAL

How brands improve peoples' lives

- PHYSICAL**
 - Healthy
 - Attractive
- INTELLECTUAL**
 - Trendy
 - Skills
 - New Ideas
- EMOTIONAL**
 - Me Happy
 - Makes me content
 - Self-Esteem
 - Peace of Mind
 - Show-off/Pride
 - Self expression
 - Privileged
 - Relaxed
- ORGANISATIONAL**
 - Life Easier
 - Better Habits
 - Save Time
- SOCIAL**
 - Belonging
 - Sharing
 - Connecting
 - Closer
- FINANCIAL**
 - Best interests
 - Savings
 - Wealth
- NATURAL**
 - Env. Enabler
 - Sense of Purpose



COLLECTIVE

A brands role in society

- ECONOMY**
 - Local Suppliers
 - Development
 - Benefits the Economy
- ETHICS**
 - Transparent
 - Causes
 - Data protection
 - Ethical
- ENVIRONMENT**
 - Respects Animals
 - Sust. consumption
 - Climate change
 - Respects Nature
 - Sust. Energy
 - Sust. Innovations
 - Clean supply chain
 - Food waste
 - Sust. Brands
- SOCIAL JUSTICE**
 - Migrants
 - LGBT+ rights
 - Women's rights
 - Anti-racism
 - Social Leader
 - Improve access
 - Diversity
- GOOD LIVING**
 - Healthy lives
 - Education
 - Culture access
 - Food security
 - Poverty
- EMPLOYER**
 - Good employer
 - Jobs
 - Invests

In orange: Attributes specific to a category

The Study is Valuable in Multiple Ways

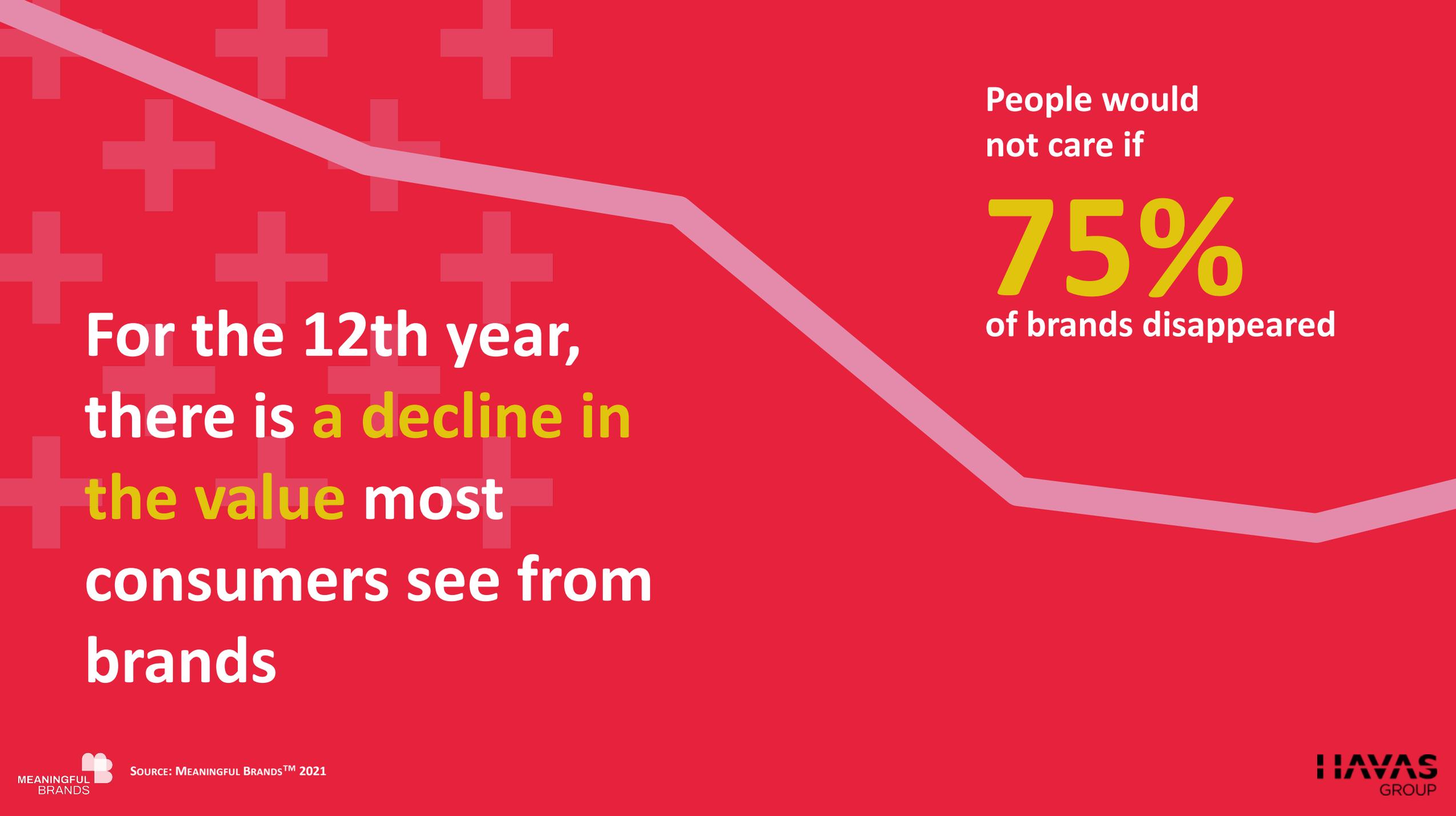
Understanding the specific
FUNCTIONAL, PERSONAL AND COLLECTIVE benefits that people are seeking from a brand in a given category

Recognizing the **DEFICIT** and capitalizing on this for competitive advantage

IDENTIFYING THE BEST KIND OF CONTENT

For a brand to deliver within the customer's journey

Unlocking the **AUTHENTIC** role for a brand to play in a landscape that requires new kinds of **SOCIETAL COMMITMENTS**



For the 12th year,
there is a decline in
the value most
consumers see from
brands

People would
not care if

75%
of brands disappeared

**Worse still - Uncertainty Spills over.
Political and social unrest, disinformation
and distrust have begun to impact our
relationship with brands.**

71%

**Of Consumers are Tired of
Brands' Empty Promises**



Cynicism

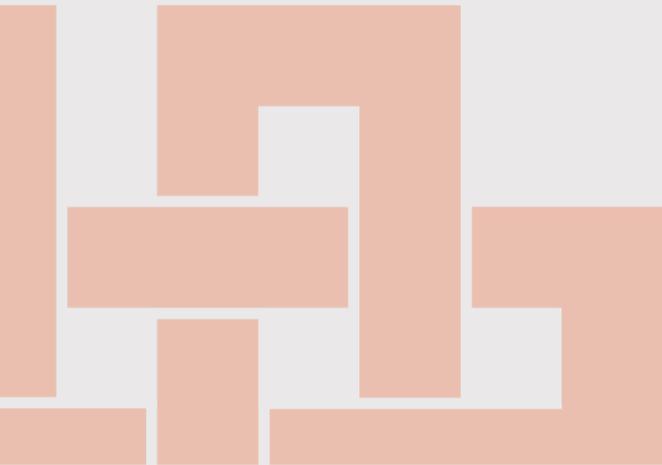
Cynicism

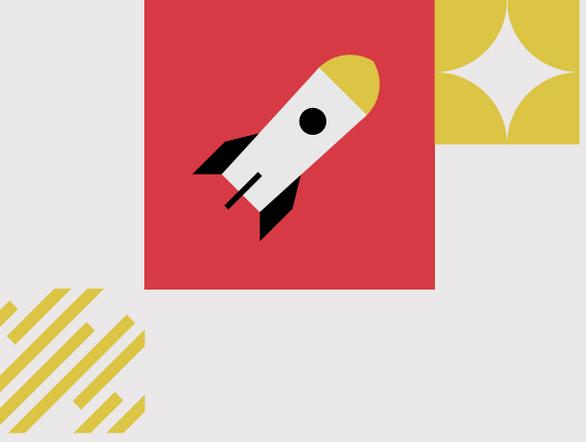
Cynicism

The Age of Cynicism

Cynicism

Cynicism





+395,000

citizens

+2,000

brands

30

markets

21

industries

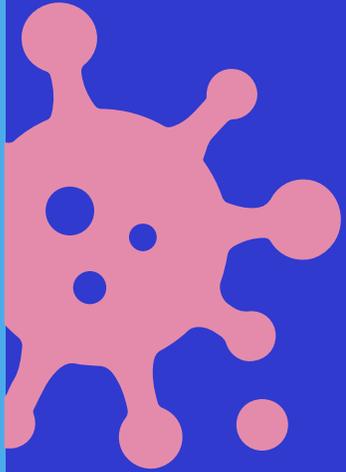
Meaningful Brands 2021 in numbers

2021 Study

(Conducted Q3 2020)

The chaotic cultural landscape exacerbated in 2020 has significantly impacted consumer priorities and behavior

**Global
Pandemic**



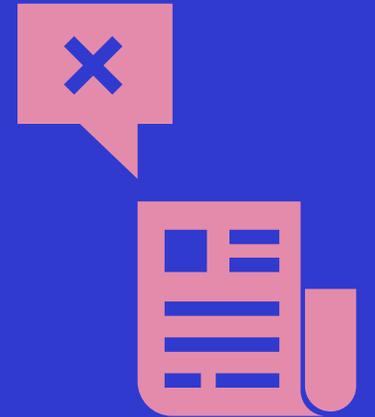
**Political
Friction**



**Societal
Demands**



**Misinformation/
Disinformation**



A state of crisis has shifted our priorities

Three quarters of Global Citizens feel we are living in a global crisis across four key areas



Public Health

78%



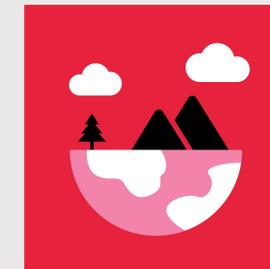
Economy

77%



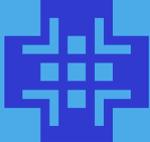
Politics

72%



Environment

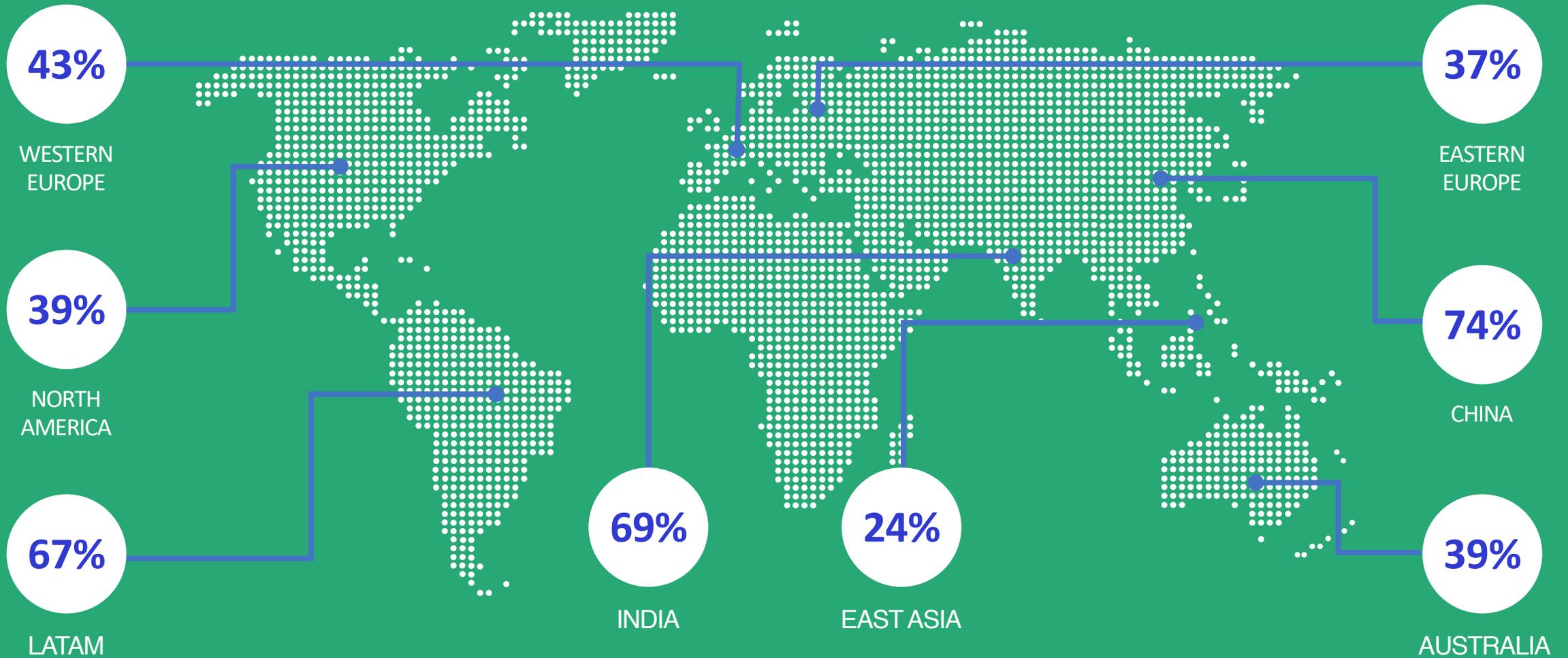
72%



47%

**Less than half of
brands are
actually seen as
trustworthy**

**Amidst this culture of chaos and
uncertainty, we are sadly, globally
aligned**



Brand Trust is At an All Time Low In Many Parts of the World



Yet expectation
is at an All Time
High

73%

think brands must
act **NOW** for the
good of society &
planet

People not only
expect better
behavior – they are
willing to pay more!

53%

are ready to pay more for a
brand that takes a stand on
environmental and social
issues

64%

of citizens prefer to buy
from companies with a
reputation for having a
purpose other than just
profits

+10 pts. vs. 2019

You can't con your consumer

They are aware of your actions

Only **36%**

feel satisfied with companies' or brands' concrete actions to make the world a better place

Only **34%**

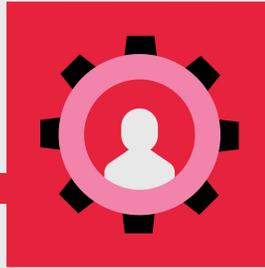
of consumers think companies and brands are transparent about their commitments and promises

Brands continue to focus on functional delivery – it's important but not the whole picture

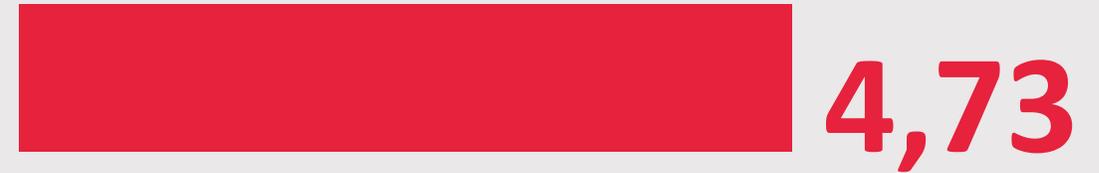
DRIVERS' IMPORTANCE

39%

FUNCTIONAL

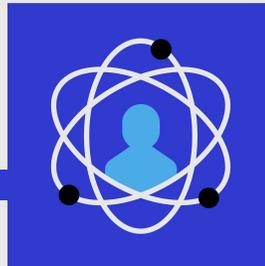


BRANDS' PERFORMANCE



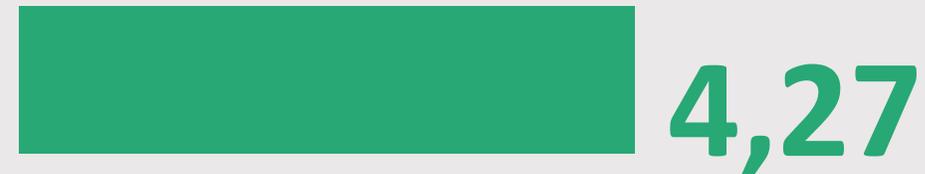
32%

PERSONAL

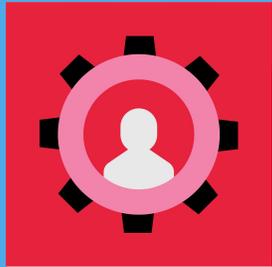


29%

COLLECTIVE



Consumers are seeking more Personal and Collective Benefits to enhance their well-being



FUNCTIONAL

Deliver a good product / service

39% ∨ -2pts

- 108 Quality Prods ∨
- 106 Delivers ∨
- 105 Safe & Responsible ∨
- 104 Fair Prices
- 103 Leader ∨



PERSONAL

Improve peoples' lives

32% ^ +2pts

- 112 Life Easier ^
- 108 Peace of Mind ^
- 108 Life Satisfaction
- 107 Show-off / Pride ^
- 106 Me Happier



COLLECTIVE

Play a role in society & environment

29% =

- 113 Transparent
- 110 Ethical
- 109 Benefits the Economy ^
- 107 Good employer ^
- 107 Jobs

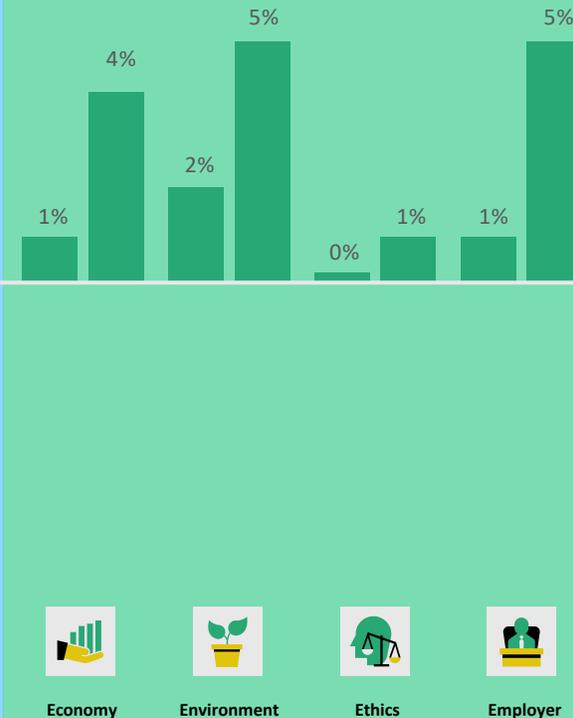
While the spike in Personal Benefits has been influenced by the crisis Collective Benefits have been trending long term

Evolution 2017-2019 & 2019-2021

Near term opportunities across **Personal** benefits



Long term opportunities across **Collective** benefits



This year, we looked more widely at how brands aim to deliver against 'collective benefits'

We analysed our study alongside the UN's Sustainable Development Goals which also aim to help brands truly deliver on purpose and sustainability



COLLECTIVE
BENEFITS



SUSTAINABLE
DEVELOPMENT
GOALS

The UN set long-term, ambitious sustainable development goals to help achieve a better world for all, holding all sectors of society accountable.



« Our goal:

By 2030, achieve a better more sustainable future for all! **ENGAGE PEOPLE, COMPANIES AND GOVERNMENTS.** Our 17 sustainable development goals are an urgent call for action »

The SDGs Focus on: People, Planet, Prosperity

17 Sustainable Development Goals (SDGs)



1 NO POVERTY
End poverty in all its forms everywhere



2 ZERO HUNGER
Food security, nutrition & sustainable agriculture



3 GOOD HEALTH AND WELL-BEING
Ensure healthy lives and well-being for all ages



4 QUALITY EDUCATION
Inclusive, quality & lifelong learning for all



5 GENDER EQUALITY
Achieve gender equality & empower all women



6 CLEAN WATER AND SANITATION
Achieve sustainable water and sanitation for all



7 AFFORDABLE AND CLEAN ENERGY
Ensure affordable, reliable, sustainable work for all



8 DECENT WORK AND ECONOMIC GROWTH
Sustained, inclusive and sustainable work for all



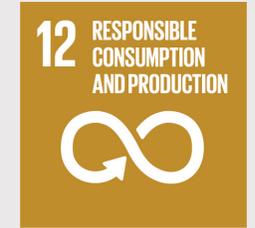
9 INDUSTRY, INNOVATION AND INFRASTRUCTURE
Inclusive and sustainable industrialization & innovation



10 REDUCED INEQUALITIES
Reduce income inequality within and among countries



11 SUSTAINABLE CITIES AND COMMUNITIES
Make cities inclusive, safe, resilient & sustainable



12 RESPONSIBLE CONSUMPTION AND PRODUCTION
Ensure sustainable consumption & production patterns



13 CLIMATE ACTION
Regulating emissions and promoting renewable energy



14 LIFE BELOW WATER
Sustainably use the oceans & marine resources



15 LIFE ON LAND
Protect ecosystems, combat desertification & biodiversity



16 PEACE, JUSTICE AND STRONG INSTITUTIONS
Promote peaceful & inclusive societies with justice for all



17 PARTNERSHIPS FOR THE GOALS
Strengthen partnerships for sustainable development

MB Collective Benefit attributes mapped against the UN SDG Goals helps to identify the path forward for Brands



POVERTY



**FOOD WASTE
FOOD SECURITY**



HEALTHY LIVES



**EDUCATION
IMPROVE ACCESS**



WOMEN'S RIGHTS



SUSTAINABLE ENERGY



**BENEFITS THE ECONOMY
JOBS
GOOD EMPLOYER**



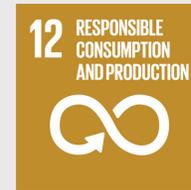
**INVESTS
SUST. INNOVATIONS**



**ANTI-RACISM
DIVERSITY
MIGRANTS
SOCIAL LEADER
LGBT+ RIGHTS**



DEVELOPMENT



**CLEAN SUPPLY CHAIN
SUST. CONSUMPTION
LOCAL SUPPLIERS
SUST. BRANDS**



CLIMATE CHANGE



**RESPECTS NATURE
RESPECTS ANIMALS**



**ETHICAL
DATA PROTECTION**

Globally, Consumers increasingly expect brands to strengthen their collective pillar

Three specific dimensions saw a significant increase



COLLECTIVE

ECONOMY

+5%

- +5%** Sustainable Consumption
- +3%** Sustainable Energy

EMPLOYER

+5%

- +3%** Good Employer
- +3%** Invests for tomorrow's economy
- +2%** Jobs

ENVIRONMENT

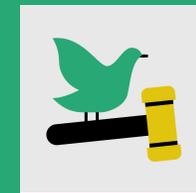
+4%

- +3%** Uses local suppliers where possible
- +4%** Fosters the local community development
- +3%** Its business activities benefit the economy of the country today



GOOD LIVING

**NEW
21**



SOCIAL JUSTICE

**NEW
21**

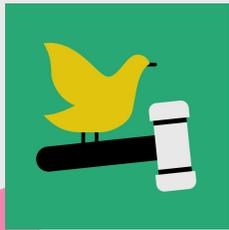


ETHICS

+1%

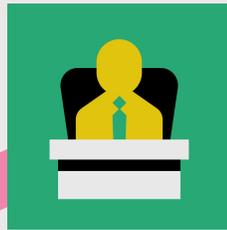
CORRELATED WITH QoL METRICS

It's not just about jumping on the bandwagon to support the latest social cause



SOCIAL JUSTICE

96



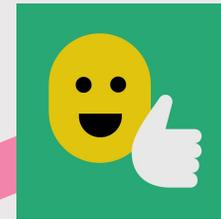
EMPLOYER

100



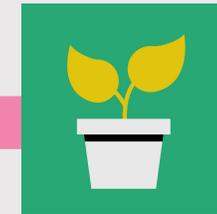
ECONOMY

100



GOOD LIVING

101



ENVIRONMENT

101



ETHICS

102



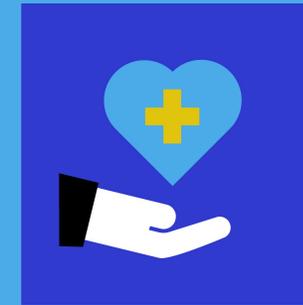
Brands should focus on what is most authentic to them

Building a better world starts at home



Food

- 2 ZERO HUNGER
- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



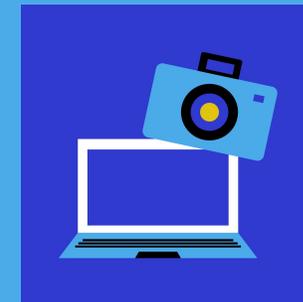
Healthcare

- 3 GOOD HEALTH AND WELL-BEING
- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



Transport

- 8 DECENT WORK AND ECONOMIC GROWTH
- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



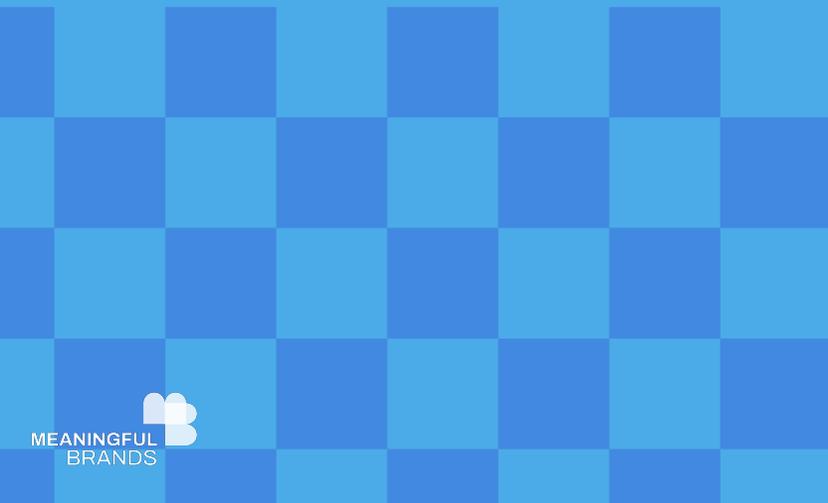
Consumer electronics

- 8 DECENT WORK AND ECONOMIC GROWTH
- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



Apparel

- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 10 REDUCED INEQUALITIES
- 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



CORRELATED WITH QoL METRICS

What key area should your Brand focus on?

The overlay helps easily pinpoint where Brand deficits and opportunities lie



1 NO POVERTY
POVERTY



5 GENDER EQUALITY
WOMEN'S RIGHTS



2 ZERO HUNGER
**FOOD WASTE
FOOD SECURITY**



7 AFFORDABLE AND CLEAN ENERGY
SUSTAINABLE ENERGY



3 GOOD HEALTH AND WELL-BEING
HEALTHY LIVES



8 DECENT WORK AND ECONOMIC GROWTH
**BENEFITS THE ECONOMY
JOBS
GOOD EMPLOYER**



4 QUALITY EDUCATION
**EDUCATION
IMPROVE ACCESS**



9 INDUSTRY, INNOVATION AND INFRASTRUCTURE
**INVESTS
SUST. INNOVATIONS**



10 REDUCED INEQUALITIES
**ANTI-RACISM
DIVERSITY
MIGRANTS
SOCIAL LEADER
LGBT+ RIGHTS**



11 SUSTAINABLE CITIES AND COMMUNITIES
DEVELOPMENT



12 RESPONSIBLE CONSUMPTION AND PRODUCTION
**CLEAN SUPPLY CHAIN
SUST. CONSUMPTION
LOCAL SUPPLIERS
SUST. BRANDS**



13 CLIMATE ACTION
CLIMATE CHANGE



14 LIFE BELOW WATER
**RESPECTS NATURE
RESPECTS ANIMALS**



15 LIFE ON LAND

16 PEACE, JUSTICE AND STRONG INSTITUTIONS
**ETHICAL
DATA PROTECTION**

Based on the outcome, brands can focus their efforts on the areas of opportunity that are most essential for them to address



COLLECTIVE BENEFITS

Attributes Identified

e.g.

- Education
- Improve access

UN SDG GOAL



UN SDG RESOURCES

Education

Tied to Principles: 1 2

Investing in education is essential to developing a skilled workforce for the future and improving economic growth. Although the number of children in the world has grown, the number in primary schools has not changed. Even those who do attend school don't always learn to read and write. Discrimination still keeps some children and adults from quality learning opportunities. This occurs despite international affirmation of the right to education.

Constrained educational resources and poverty often limit access to education. Additionally, the skills students learn in school don't always match up with workplace needs.

Quality Education

Goal 4. Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

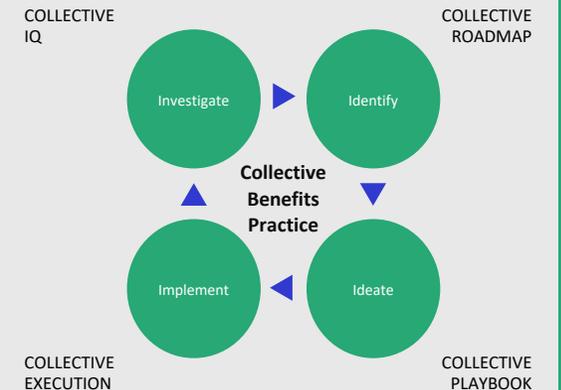
- Why business should support education
- A Framework for Business Engagement in Education
- Children's Rights and Business Principles
- Principles for Responsible Management Education
- From our library
- Additional Tools: SDG Compass; SDG Matrix

HAVAS EXPERTISE

Investigate > Identify > Ideate > Implement

COLLECTIVE BENEFITS

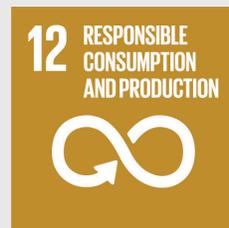
Our bespoke approach to boosting a brand's Collective Benefits



The **Collective Benefits Practice** comprises 4 stages with individual inputs

e.g.

- Clean supply chain
- Sustainable Consumption
- Local Suppliers
- Sustainable Brands



Supply Chain Sustainability

A company's entire supply chain can make a significant impact in promoting human rights, fair labour practices, environmental progress and anti-corruption policies.

However, UN Global Compact participants rank supply chain practice challenge to improving their sustainability performance. Extending the Compact's Ten Principles into the supply chain can be difficult because of the complexity of many supply chains.

The UN Global Compact encourages companies to make sustainability the top of the organization. If the chief executive sees the supply chain of their workforce and community, the company can set expectations, practices across its supply chain. These can include key areas such as training, auditing and remediation.

Doing so promotes a broader understanding within an organization of its role, beyond procurement, can affect the supply chain. For example, product developers and marketing all can have an impact. In addition, the company can set expectations, practices across its supply chain.

Responsible Consumption and Production

Goal 12. Ensure sustainable consumption and production patterns

- Why business should support supply chain sustainability
- Global Compact Management Model
- Global Reporting Initiative
- From our library
- Additional Tools: SDG Compass; SDG Matrix

Age of Cynicism

QUESTIONS TO CONSIDER

GAIN TRUST THROUGH TRANSPARENCY

- How trustworthy is your brand considered to be based on past and current actions? Are there / Where are the gaps?
- Do your communication goals align with your brand heritage?
- What specific collective attributes connect with your brand that enables you to organically get more involved?
- How can your brand's content strategy more authentically connect with consumers?

PURPOSE OVER PROFIT

- How can your client leverage the Havas 'Collective Benefits' Tool to better inform communication strategies?
- What SDG's are the lowest hanging fruit that your brand can genuinely align to and consider to take greater action?
- What are first steps your brand can take to workshop a gap analysis on your current sustainability standing vs. the SDGs?



The Age of Cynicism

Additional Observations

Observation
Observations
Observations
Observations
Observations
Observations
Observations
Observations
Observations



1

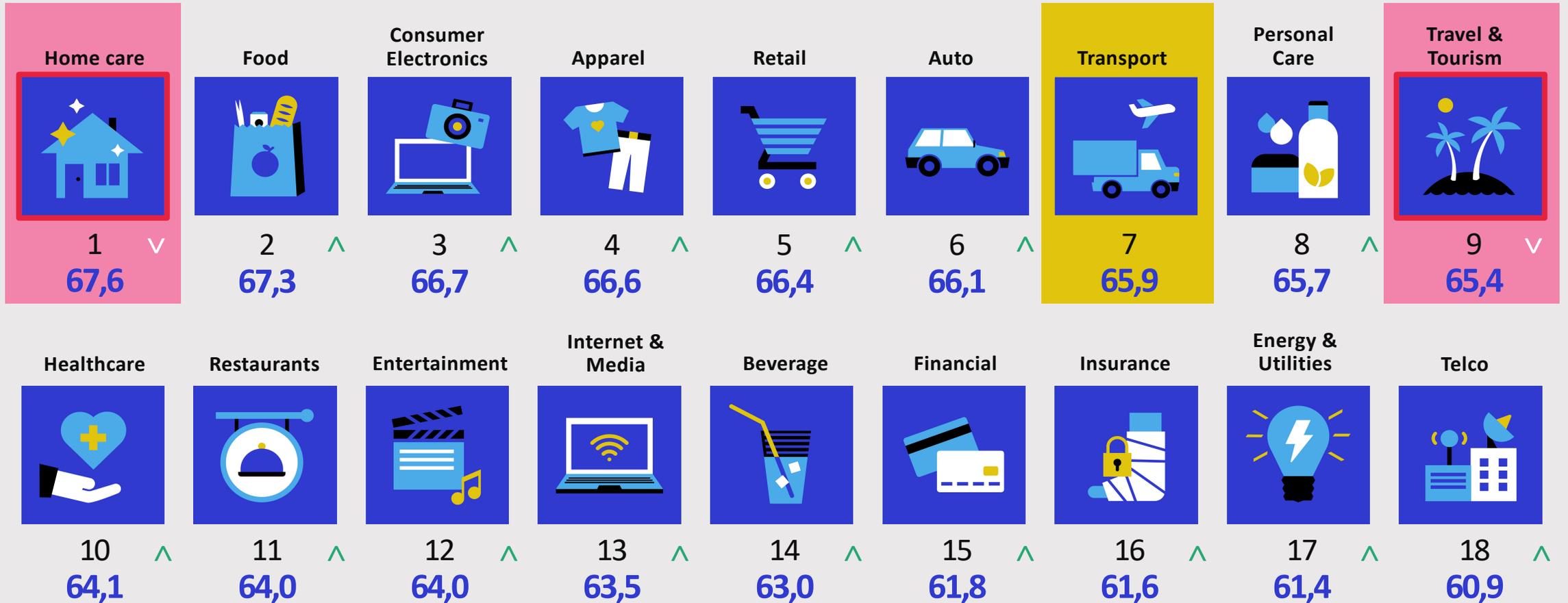
**Brands' status
elevated by
increasing **Personal**
and **Collective**
benefits**

Top 30 Brands

66%

of Consumers want more
meaningful experiences

Overall, most categories gain in meaningful scores



Most Meaningful Global Brands 2021

1  75,0	2  72,9	3  WhatsApp 72,1	4  YouTube 71,8	5  71,7	6  Microsoft 71,7	7  71,5	8  71,4	9  71,3	10  71,1
11  70,9	12  70,8	13  70,4	14  70,3	15  70,3	16  70,2	17  70,0	18  69,9	19  69,6	20  69,6
21 New in 2021  69,5	22  69,5	23  69,4	24  69,4	25  69,4	26  69,3	27  69,1	28  69,0	29  69,0	30  68,9

Brands that focus on **personal and collective benefits** resonate more with Consumers



2019:

#4 #5 #6 #9 #18



2019:

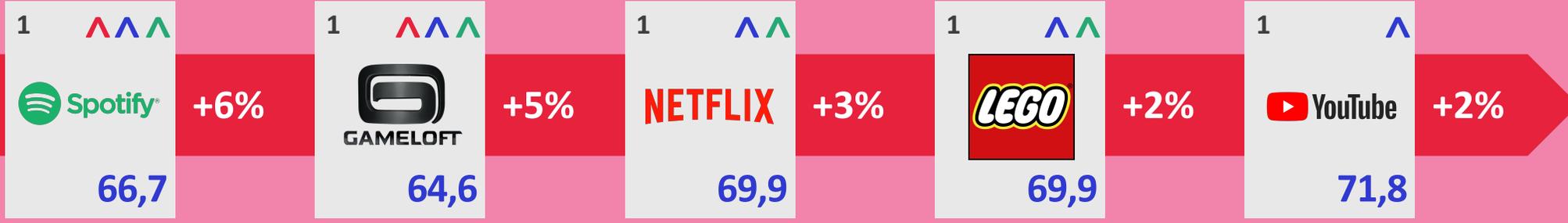
#23 #24 #22 #19 #30

The categories and brands that saw accelerated growth is not surprising given the behavioral changes shaped by the cultural backdrop

ACCESSIBLE RETAIL



HOMETAINMENT



TECH SOLUTIONS



2

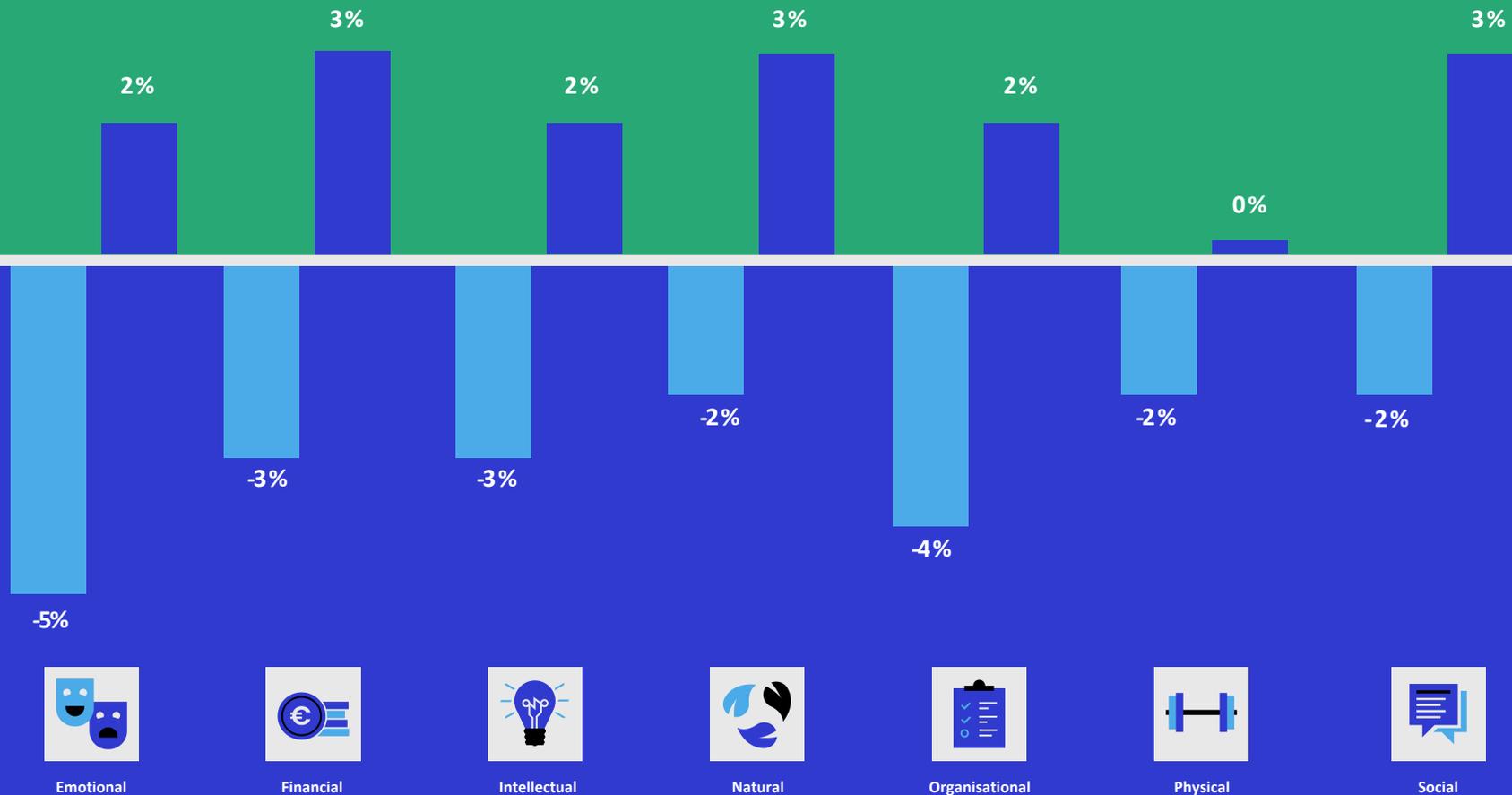
**There are
immediate
opportunities to
forge meaningful
connections in the
short term**

77%

of Consumers expect Brands
to show support to people
in times of crisis

The crisis brought a greater need for **personal benefits** to be met today

Evolution 2017-2019 & 2019-2021



Emotional

Financial

Intellectual

Natural

Organisational

Physical

Social

Consumers expect brands to help in decreasing life's stressors



109



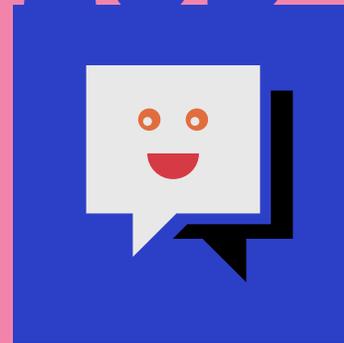
Makes my life easier

106



Gives me peace of mind

105

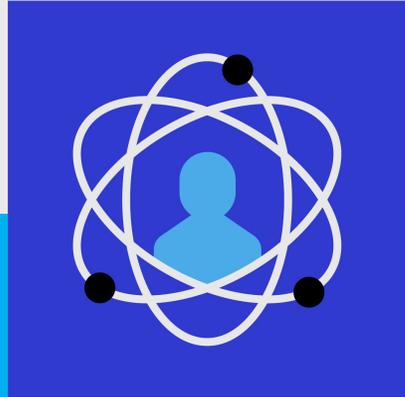


Helps me feel truly happy

105

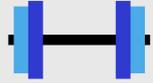


Helps me feel content in my daily life



PERSONAL

PHYSICAL



SOCIAL



NATURAL



FINANCIAL



ORGANISATIONAL



INTELLECTUAL



EMOTIONAL



=

+3%

+3%

+3%

+2%

+2%

+2%

Specific dimensions have also
increasingly
become more in demand

- CORRELATED WITH QoL METRICS



SOCIAL

+3%

Makes me feel part of a group

+3%

Helps me to share experiences/moments with others

+2%

Helps me to connect with people and/or meet new people



INSPIRE

+4%

Inspires me to make the world a better place

+2%

Enables me to be more environmentally friendly



FINANCIAL

+3%

Helps me save money

+3%

Helps me grow my wealth

The attributes within each that have become more important to consumers, **follow the theme of focusing on people, the planet, and prosperity**

- CORRELATED WITH QOL METRICS

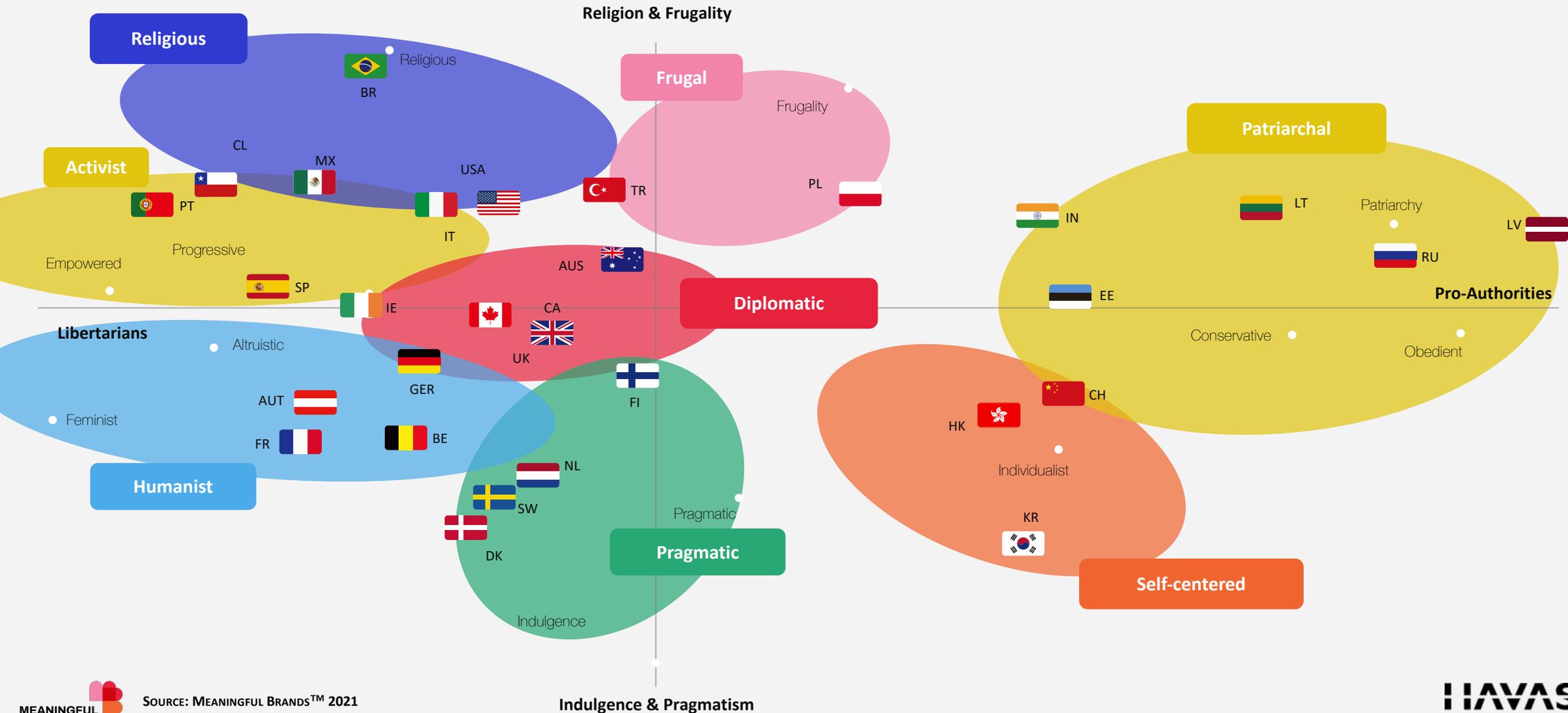
3

East Meets West

Cultural
intricacies matter:

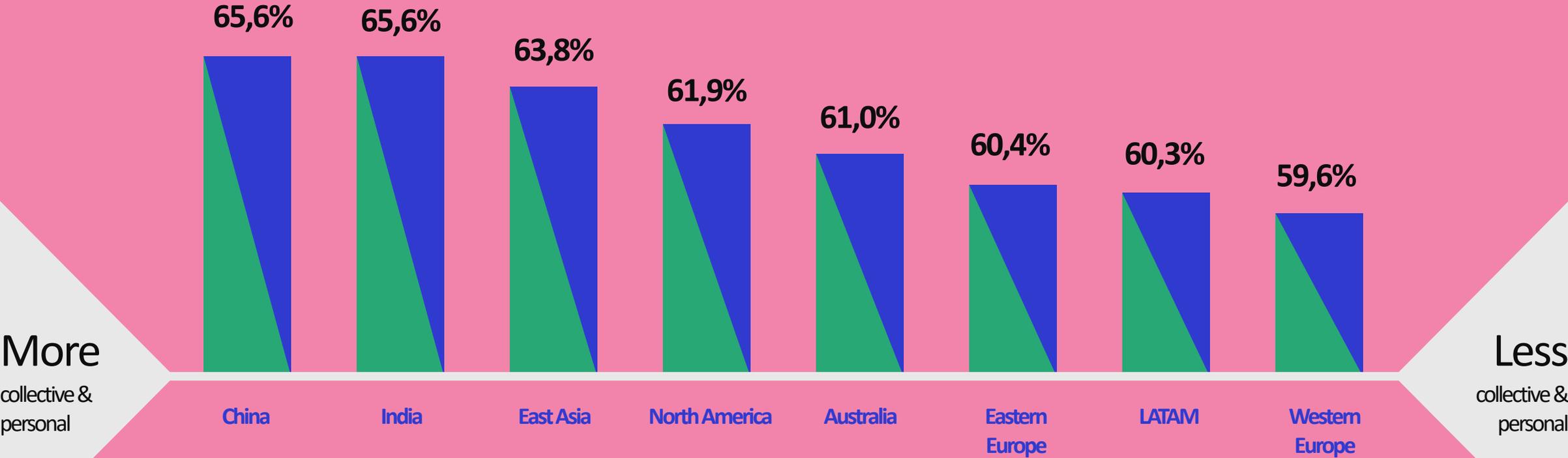
**'we' vs. 'me' mentality influences
expectations**

Cultural ethos defines what is right in societies



There is a higher expectation in the East for personal and collective benefits compared to the West

Surprisingly, LATAM is on par with Europe



More
collective &
personal

Less
collective &
personal

Personal Benefits:

After organizational and emotional benefits, unsurprisingly, consumers in APAC seek to connect while Western countries seek more individual gains



- CORRELATED WITH QoL METRICS

Collective Benefits:

Clearly influenced by the impacts of the cultural landscape specific to a region, morality is top of mind for Western countries while Asian countries place top importance on the environment



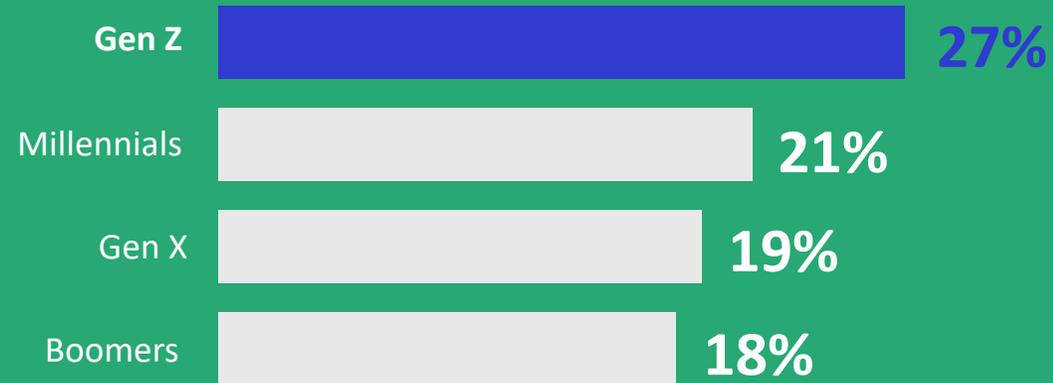
- CORRELATED WITH QoL METRICS

4

Gen Z is an open-minded generation who seek individuality and don't mind questioning society 'rules'

Gen Z are more likely to speak their minds and challenge traditional constructs than other generations

PEOPLE SHOULD DARE TO DISOBEY AND PROVOKE TO REALLY HAVE A SAY



SEX-ROLES ARE PURELY SOCIAL CONSTRUCTIONS (OUTSIDE CHILDBEARING)



**Brands that enable
them to convey
their individuality
pique their interest**

55%

**are looking for differentiated
products and services which
allow them to express their
individuality**

vs. 36% Boomers

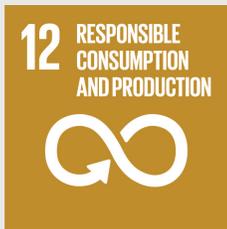
Gen Z is particularly focused on Reduced inequalities

Inclusion and Expression of Self are of paramount importance for this generation

GEN Z



109

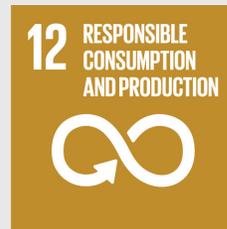


109



107

TOTAL POPULATION



107



106

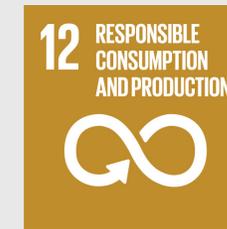


105

BOOMERS (+56 YO)



109



108



106

- CORRELATED WITH QoL METRICS

**Gen Z have extra heart for brands that take effective action
and are accepting of all people**

**Takes a lead on social
issues**

105

**Embraces
diversity**

102



5

Meaningful Content:

Nearly half of content
fails to deliver

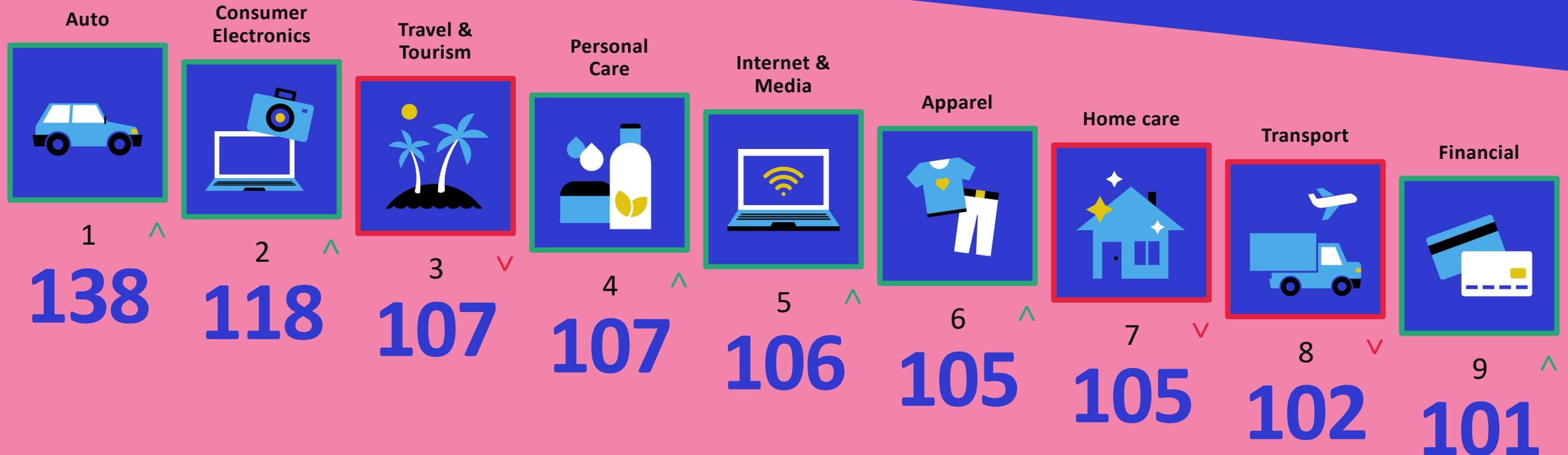
Compared to pre Covid, 'Help'
Content is on the rise

48%

of the content
provided by Brands
is not meaningful to
Consumers

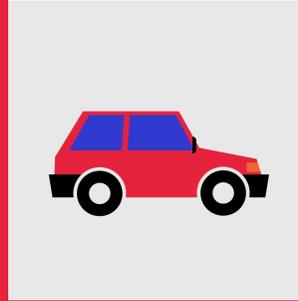
Content effectiveness varies by industry

Categories that had limited engagement due to govt safety measures were negatively impacted



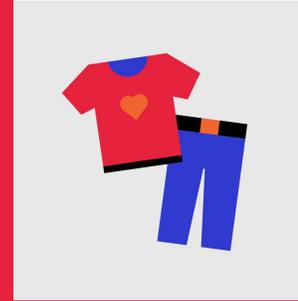
The most expected roles of content are to Reward and Inspire

AUTO



1. Help
2. Inform
3. Reward

APPAREL



1. Reward
2. Entertain
3. Inspire

BEVERAGE



1. Entertain
2. Reward
3. Inspire

FOOD



1. Help
2. Inspire
3. Reward

ENTERTAINMENT



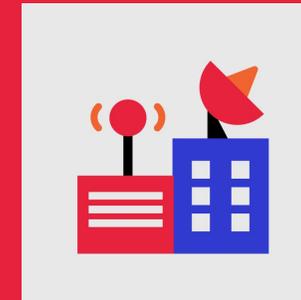
1. Reward
2. Entertain
3. Inspire

INTERNET & MEDIA



1. Entertain
2. Inspire
3. Help

TELCO



1. Help
2. Reward
3. Inform

PERSONAL CARE



1. Help
2. Inspire
3. Inform

Standard
Already fulfilled

Least
expected

Secondary
Do not focus only
here



EDUCATE



ENTERTAIN



INSPIRE

Most
associated



HELP



INFORM

Must Have
Have to be there

Most
expected



REWARD

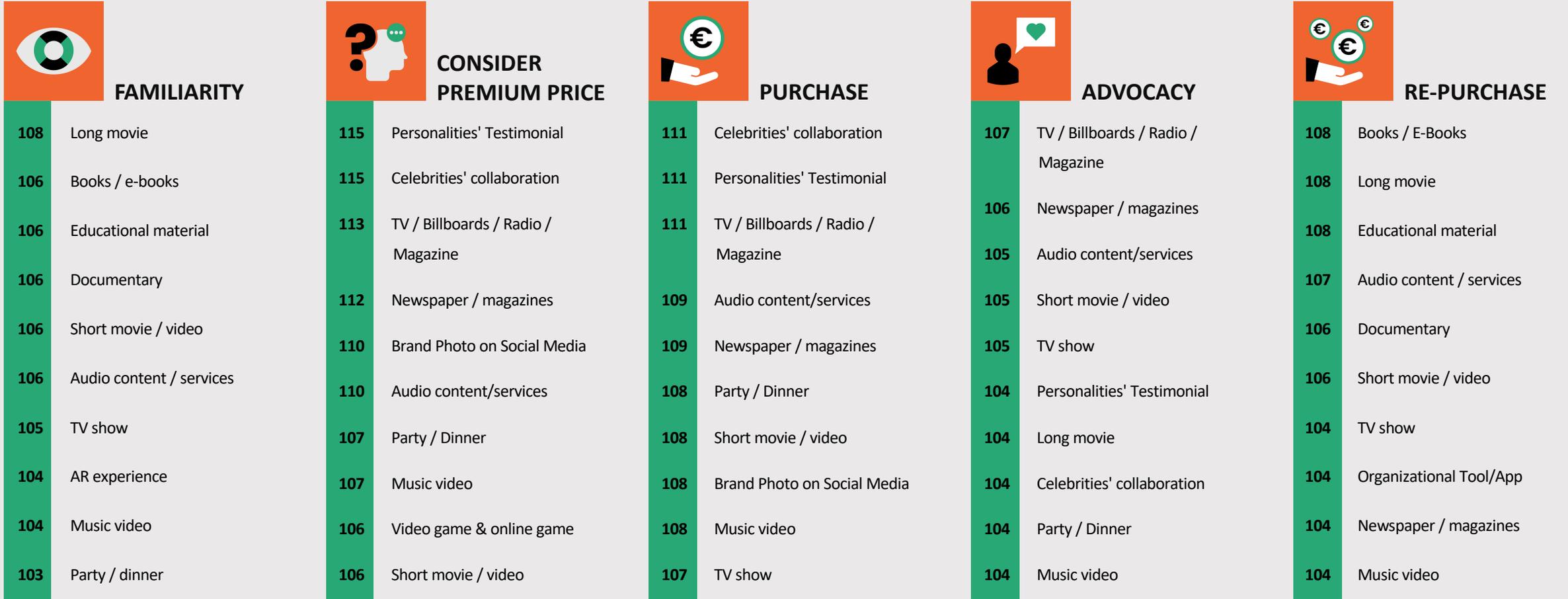
Opportunity
Potential
differentiation lever

Least
associated

However, **HELP** is the content role that grew in importance and topped the list of content expected from Global Brands

What you say is as important as how you say it

ASSOCIATED CONTENT TYPE ACROSS DIFFERENT POINTS IN A CONSUMER DECISION JOURNEY



THANK YOU
THANK YOU

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