2017 Edelman Trust Barometer

Global Report

Edelman trustbarometer 2017 | ANNUAL GLOBAL STUDY

Edelman

2017 Edelman Trust Barometer Methodology

Online Survey in 28 Countries

17 years of data

33,000+ respondents total

All fieldwork was conducted between October 13th and November 16th, 2016

General Online Population

6 years in 25+ markets

Ages 18+

1,150 respondents per country

All slides show General Online Population unless otherwise noted

Informed Public

9 years in 20+ markets

Represents 13% of total global population

500 respondents in U.S. and China; 200 in all other countries

Must meet 4 criteria:

- Ages 25-64
- College educated
- In top 25% of household income per age group in each country
- Report significant media consumption and engagement in business news

Mass Population

All population not including Informed Public

Represents 87% of total global population

28-country global data margin of error: General Population +/-0.6% (N=32,200), Informed Public +/- 1.2% (N=6,200), Mass Population +/- 0.6% (26,000+). Country-specific data margin of error: General Population +/- 2.9 (N=1,150), Informed Public +/- 6.9% (N = min 200, varies by country), China and U.S. +/- 4.4% (N=500), Mass Population +/- 3.0 to 3.6 (N =min 740, varies by country), half sample Global General Online Population +/- 0.8 (N=16,100).

Trust in Retrospect

2001 — Rising Influence of NGOs

2002 — Fall of the Celebrity CEO

2003 — Earned Media More Credible Than Advertising

2004 — U.S. Companies in Europe Suffer Trust Discount

2005 — Trust Shifts from "Authorities" to Peers

2006 — "A Person Like Me" Emerges as Credible Spokesperson

2007 — Business More Trusted Than Government and Media

2008 — Young Influencers Have More Trust in Business

2009 — Business Must Partner with Government to Regain Trust

2010 — Trust is Now an Essential Line of Business

2011 — Rise of Authority Figures

2012 — Fall of Government

2013 — Crisis of Leadership

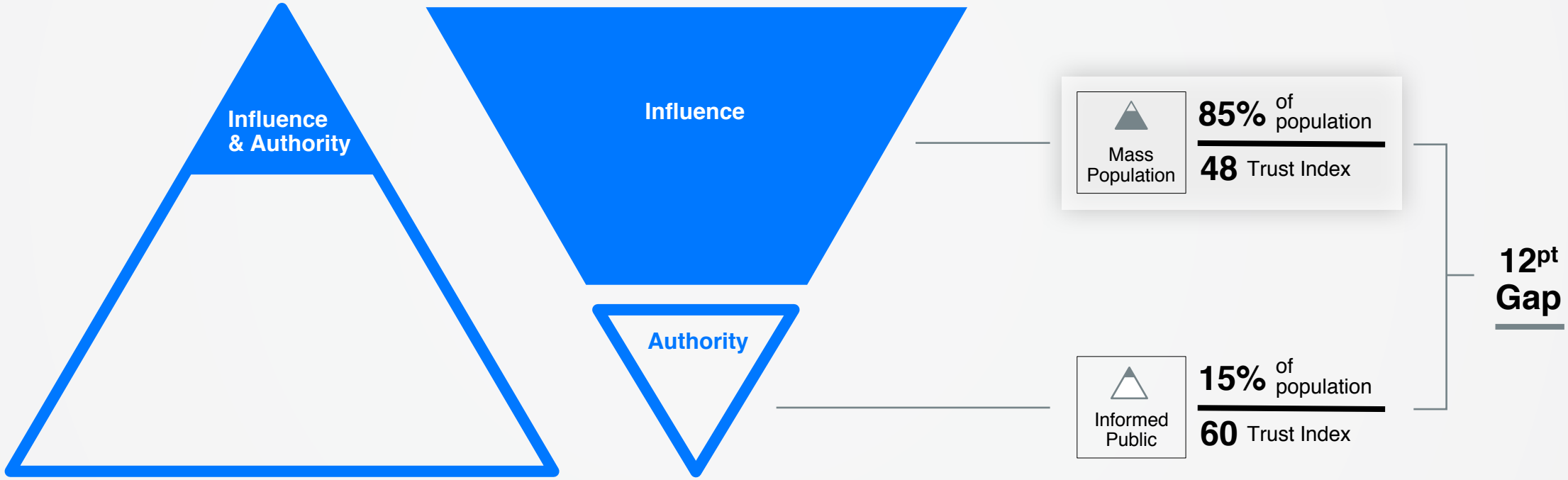
2014 — Business to Lead the Debate for Change

2015 — Trust is Essential to Innovation

2016 — Growing Inequality of Trust

2017 — **Trust in Crisis**

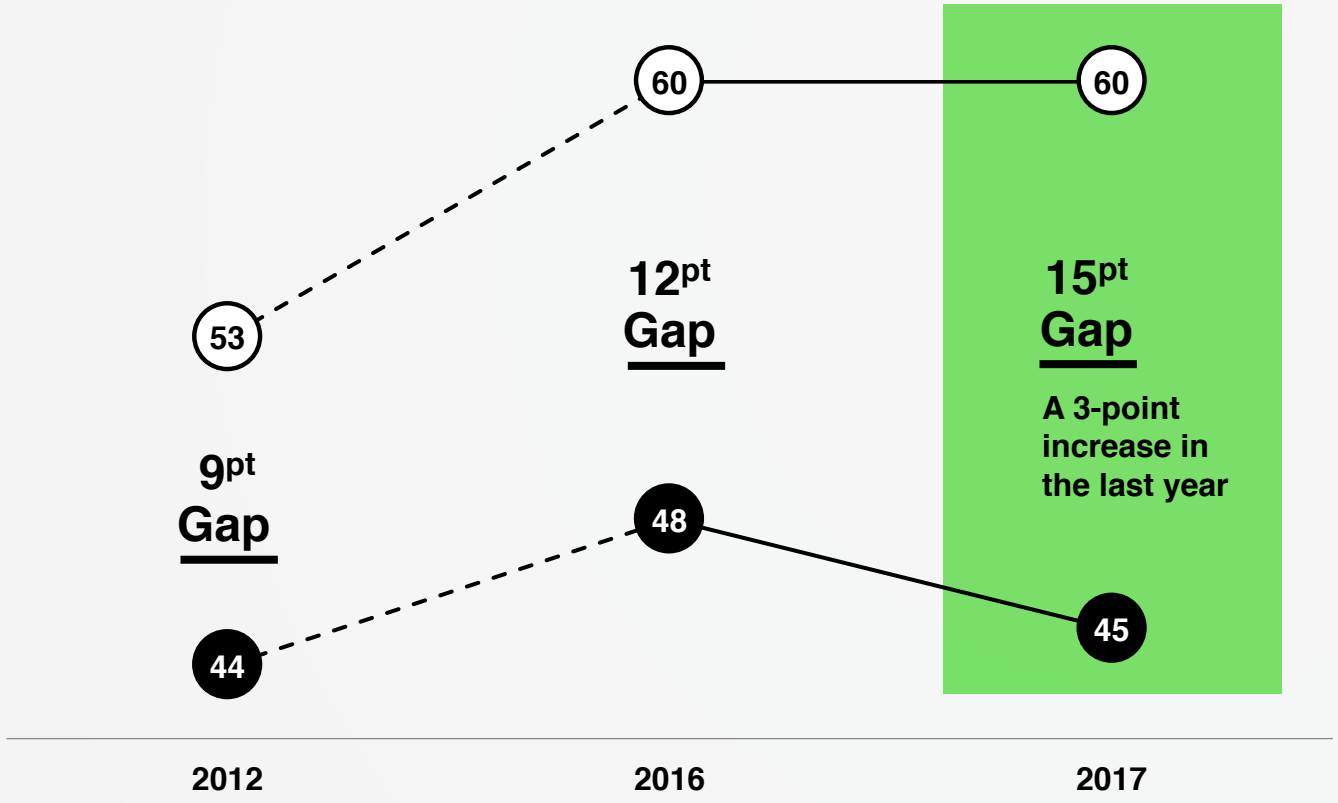
2016: The Inversion of Influence



Source: 2017 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, 28-country global total.

2017: Trust Gap Widens

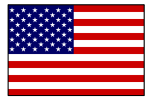
Percent trust in the four institutions of government, business, media and NGOs, 2012 to 2017



Informed Public

Mass Population

Largest Gaps


21 pts

19 pts

18 pts

Source: 2017 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, 25-country global total.

Trust Index

Mass Population Left Behind

Average trust in institutions, Informed Public vs. Mass Population

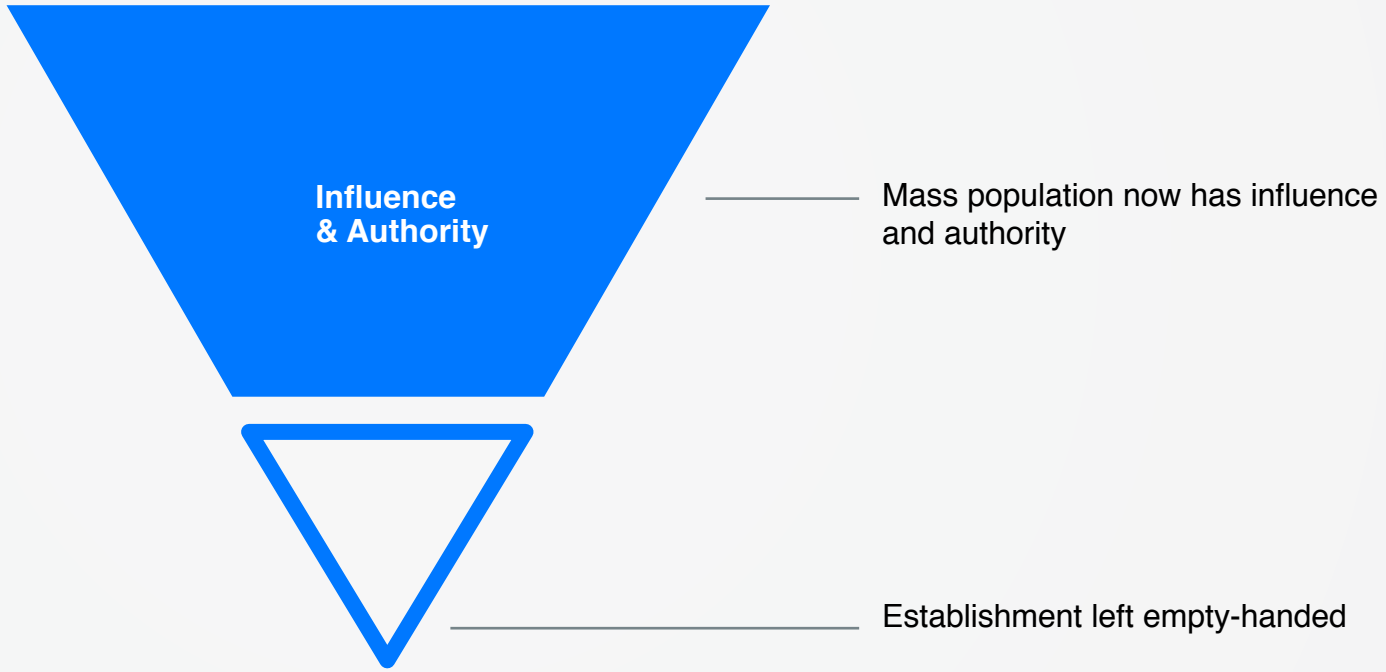
Trusters (60-100)

Neutrals (50-59)

Distrusters (1-49)

Source: 2017 Edelman Trust Barometer.
The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, 28-country global total.

2017: Mass Population Rejects Established Authority

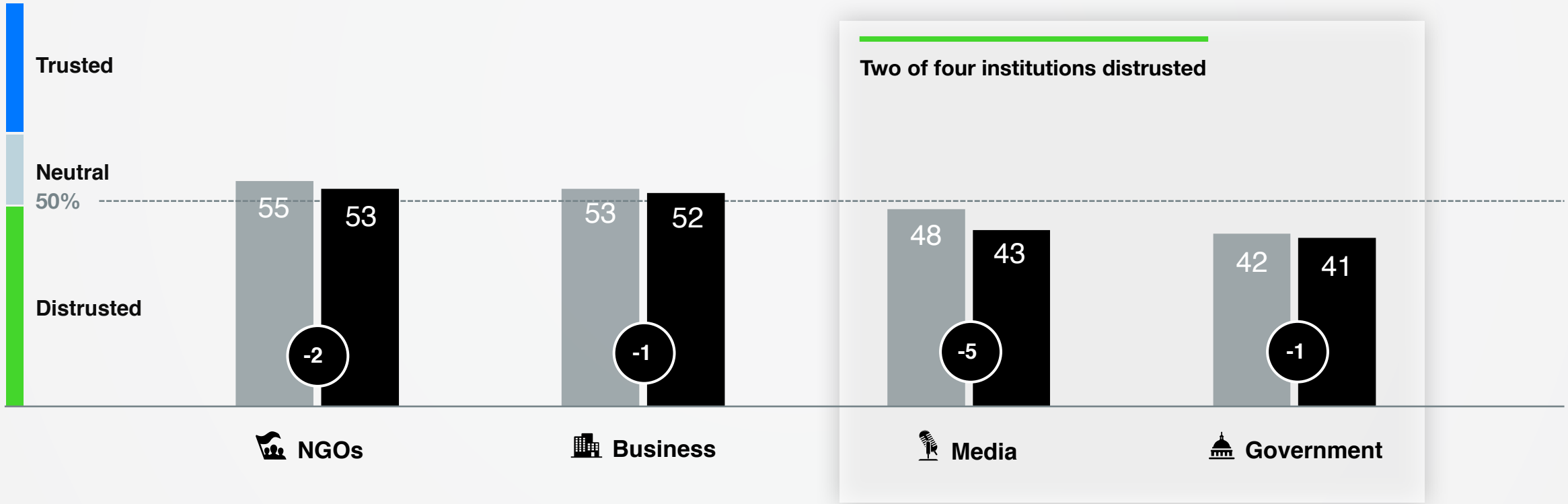


Trust in Crisis

How much do you trust each institution to do what is right?

Trust in All Four Institutions Declines

Percent trust in the four institutions of government, business, media and NGOs, 2016 vs. 2017



Source: 2017 Edelman Trust Barometer Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General Population, 28-country global total.

Trust Index

A World of Distrust

Average trust in institutions, General Population, 2016 vs. 2017

Trusters (60-100)

Neutrals (50-59)

Distrusters (1-49)

3-point decrease in the global Trust Index

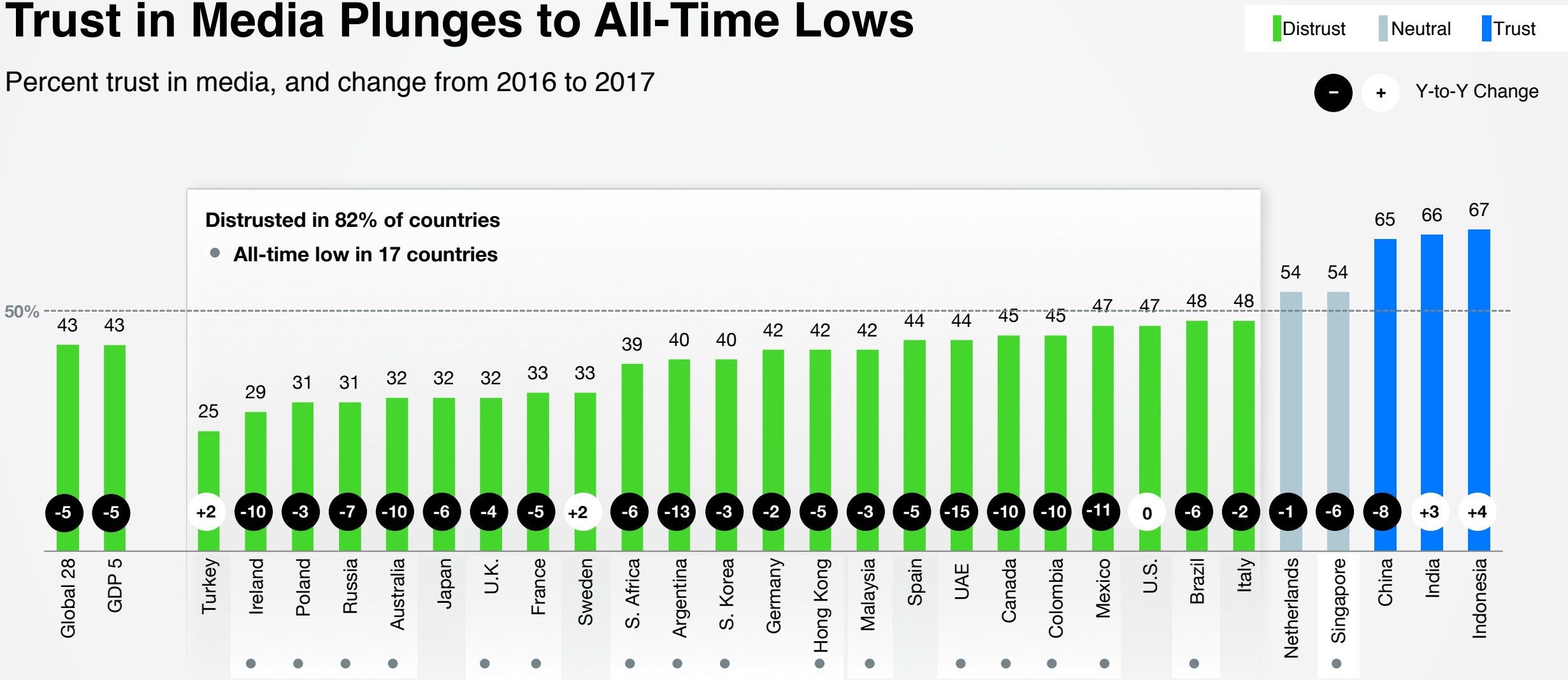
Trust declines in 21 of 28 countries—the broadest declines since beginning General Population tracking in 2012

2 in 3 countries are now distrusters

Source: 2017 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. General Population, 28-country global total.

Trust in Media Plunges to All-Time Lows

Percent trust in media, and change from 2016 to 2017

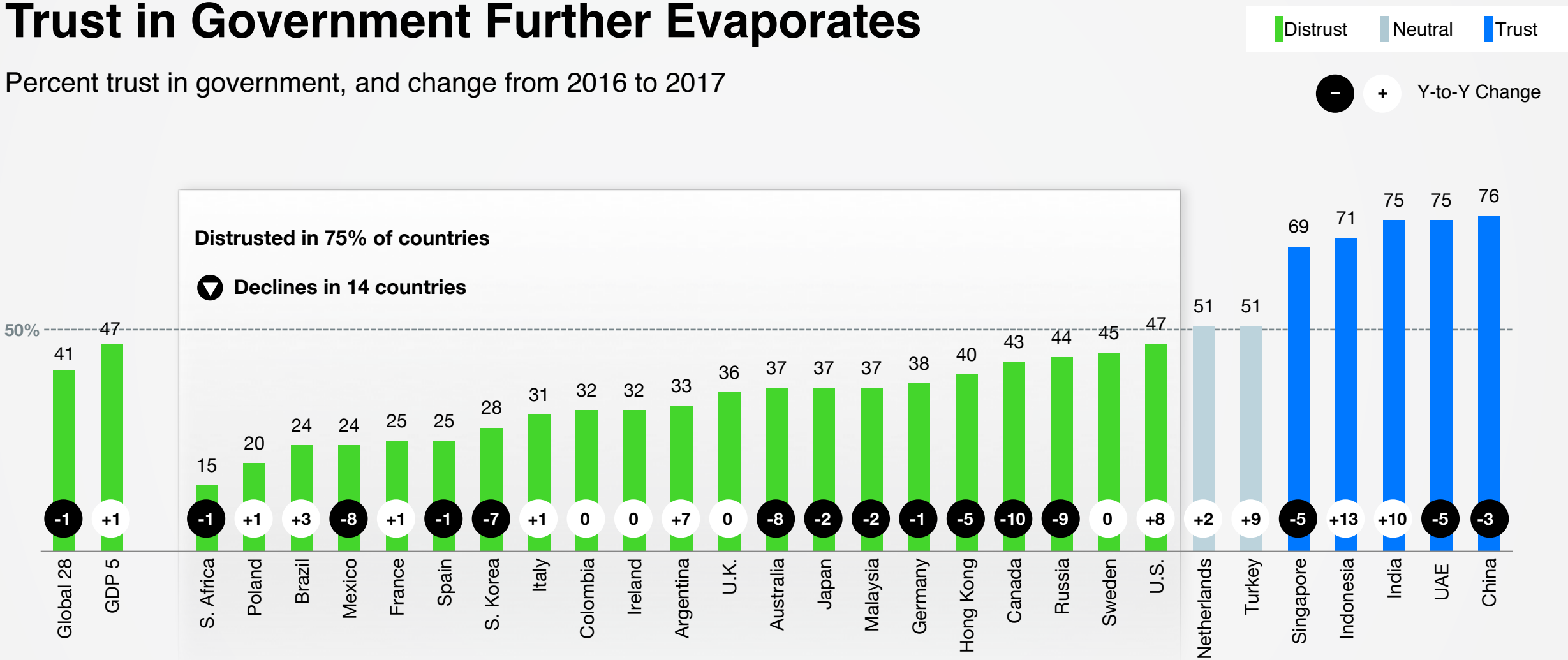


Source: 2017 Edelman Trust Barometer Q11-620. [TRACKING] [MEDIA IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General Population, 28-country global total.

GDP 5 = U.S., China, Japan, Germany, U.K.

Trust in Government Further Evaporates

Percent trust in government, and change from 2016 to 2017

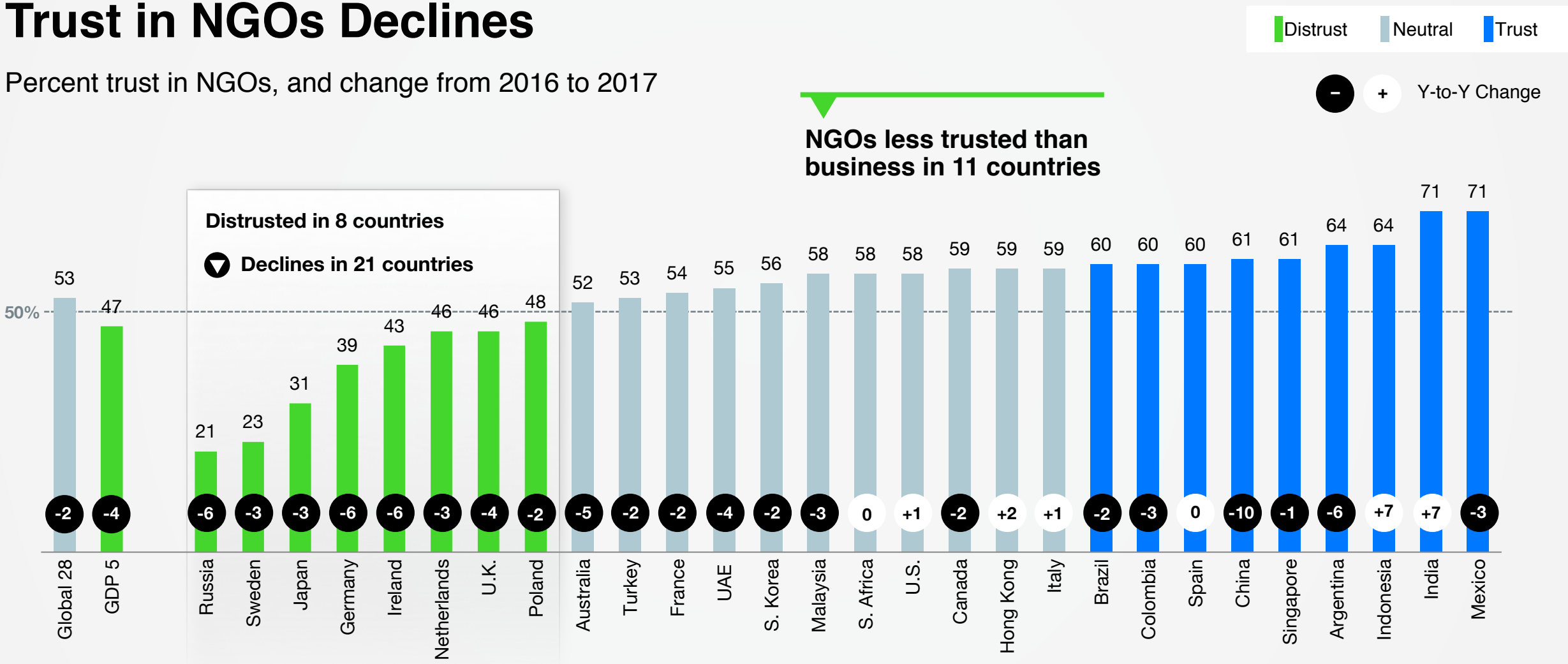


Source: 2017 Edelman Trust Barometer Q11-620. [TRACKING] [GOVERNMENT IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General Population, 28-country global total.

GDP 5 = U.S., China, Japan, Germany, U.K.

Trust in NGOs Declines

Percent trust in NGOs, and change from 2016 to 2017

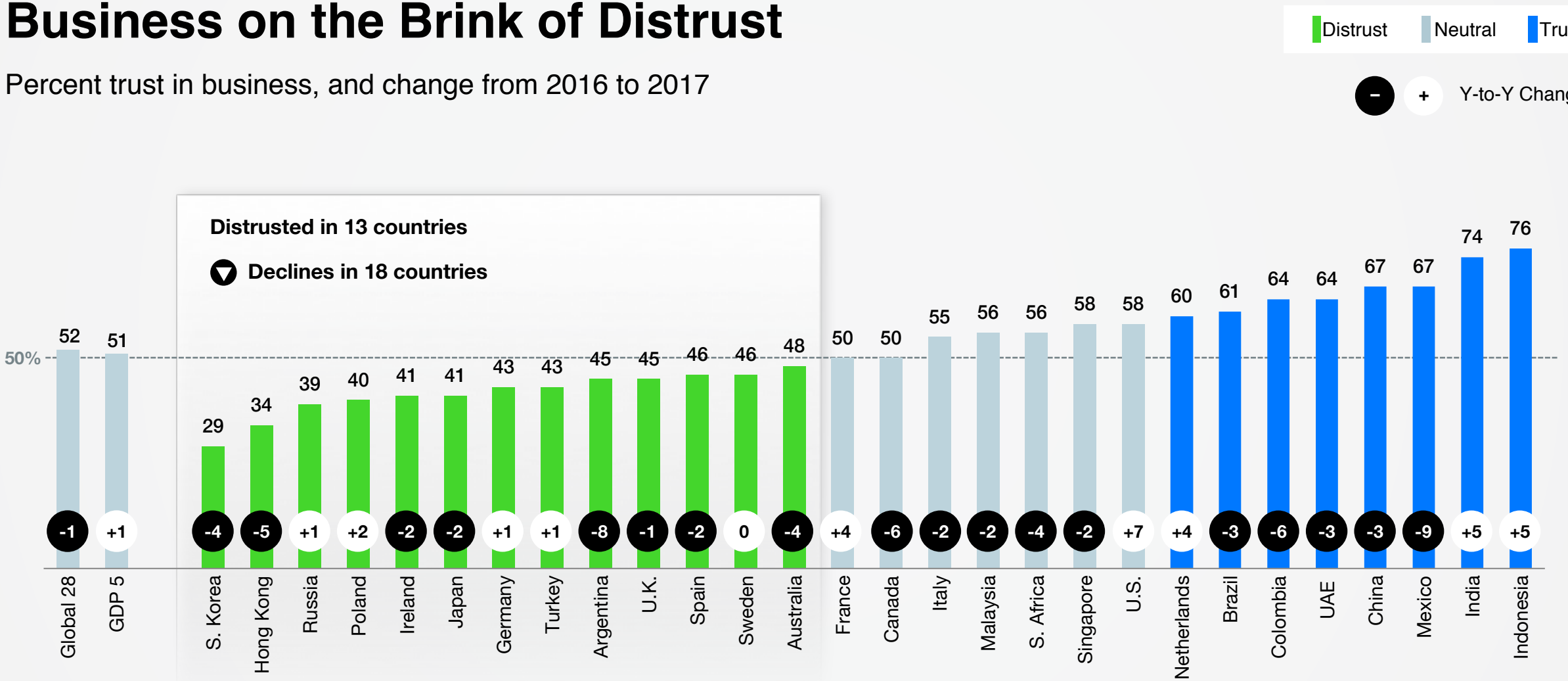


Source: 2017 Edelman Trust Barometer Q11-620. [TRACKING] [NGOs IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General Population, 28-country global total.

GDP 5 = U.S., China, Japan, Germany, U.K.

Business on the Brink of Distrust

Percent trust in business, and change from 2016 to 2017

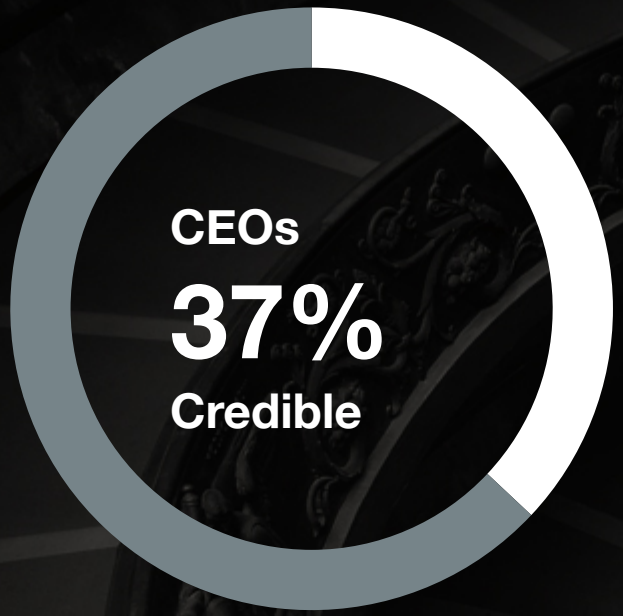


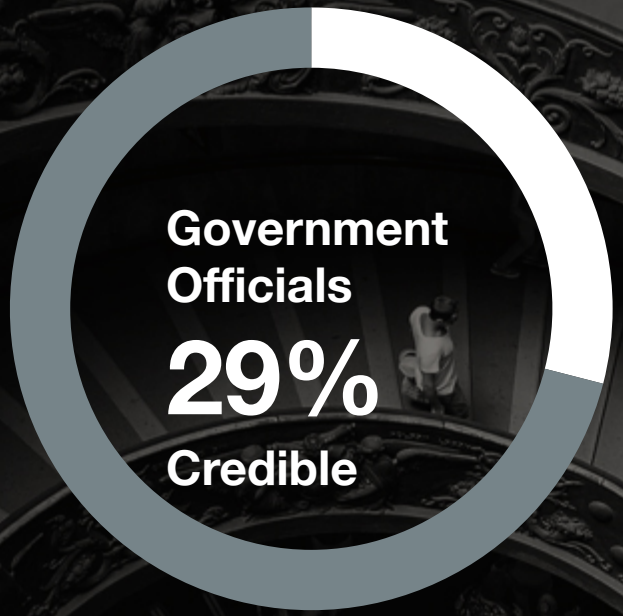
Source: 2017 Edelman Trust Barometer Q11-620. [TRACKING] [BUSINESS IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General Population, 28-country global total.

GDP 5 = U.S., China, Japan, Germany, U.K.

Credibility of Leadership in Crisis

Percent who rate each spokesperson as very/extremely credible

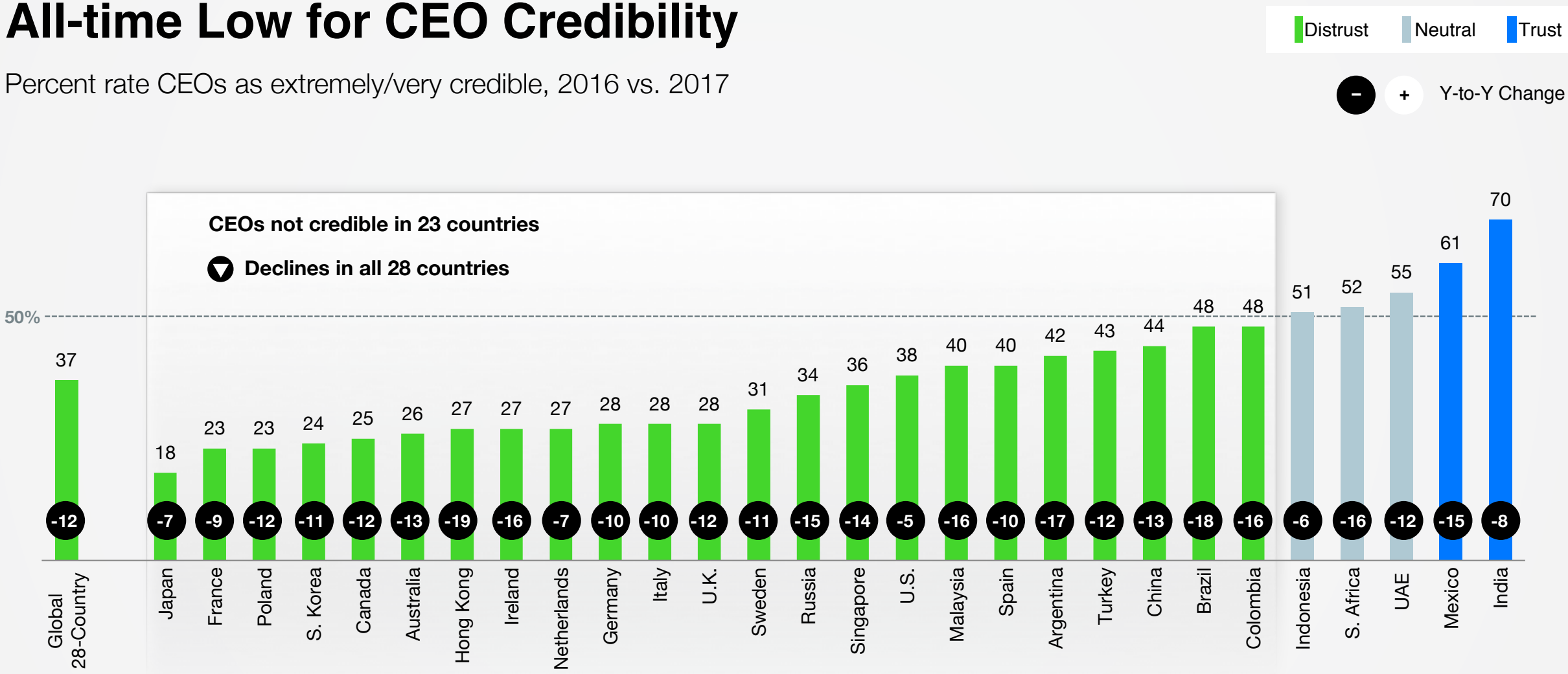




Source: 2017 Edelman. Trust Barometer Q130-747 Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible) General Population, 28-country global total, question asked of half the sample.

All-time Low for CEO Credibility

Percent rate CEOs as extremely/very credible, 2016 vs. 2017



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GDP 5 = U.S., China, Japan, Germany, U.K.

The System
Is Broken

Without Trust, Belief in the System Fails

How true are each of the following?

Sense of Injustice

System biased in favor of elites, elites indifferent to the people, getting richer than they deserve

Lack of Hope

Hard work not rewarded, children will not have a better life, country not moving in right direction

Lack of Confidence

No confidence in current leaders

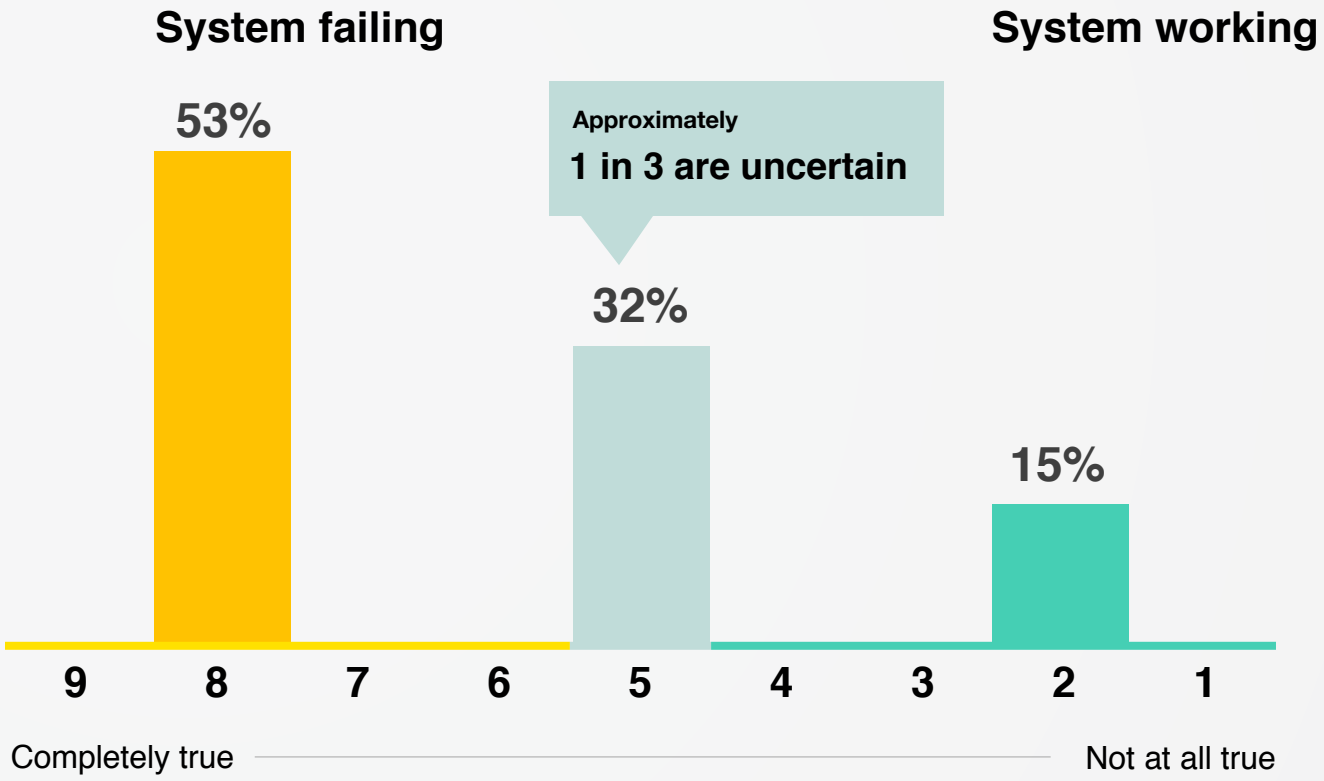
Desire for Change

Need forceful reformers to bring change

Majority Believe the System is Failing Them

How true is this for you?

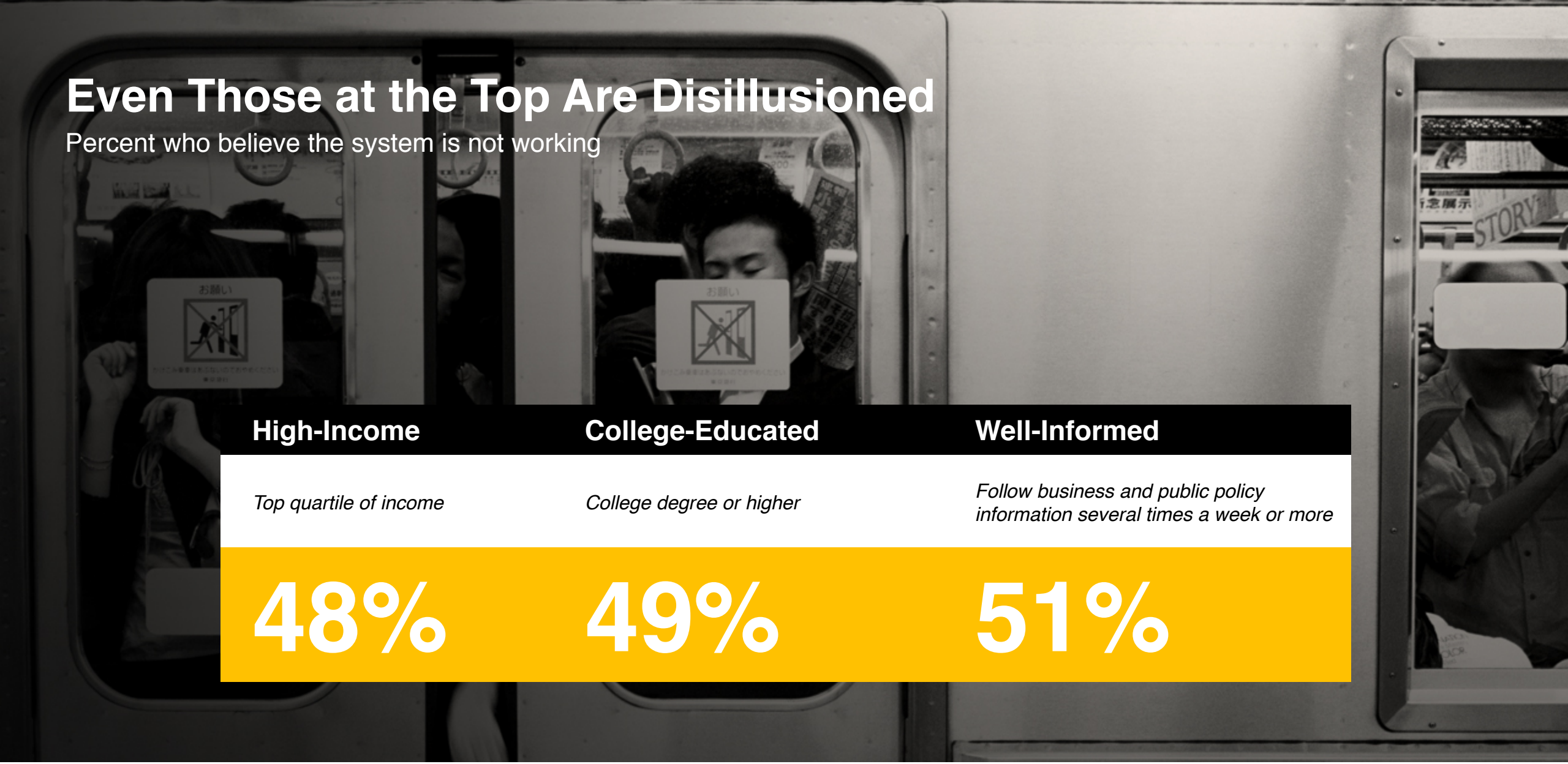
- Sense of injustice
- Lack of hope
- Lack of confidence
- Desire for change



Source: 2017 Edelman Trust Barometer Q672-675, 678-680, 688-690.
For details on how the "system failing" measure was calculated, please refer to the Technical Appendix.

Even Those at the Top Are Disillusioned

Percent who believe the system is not working

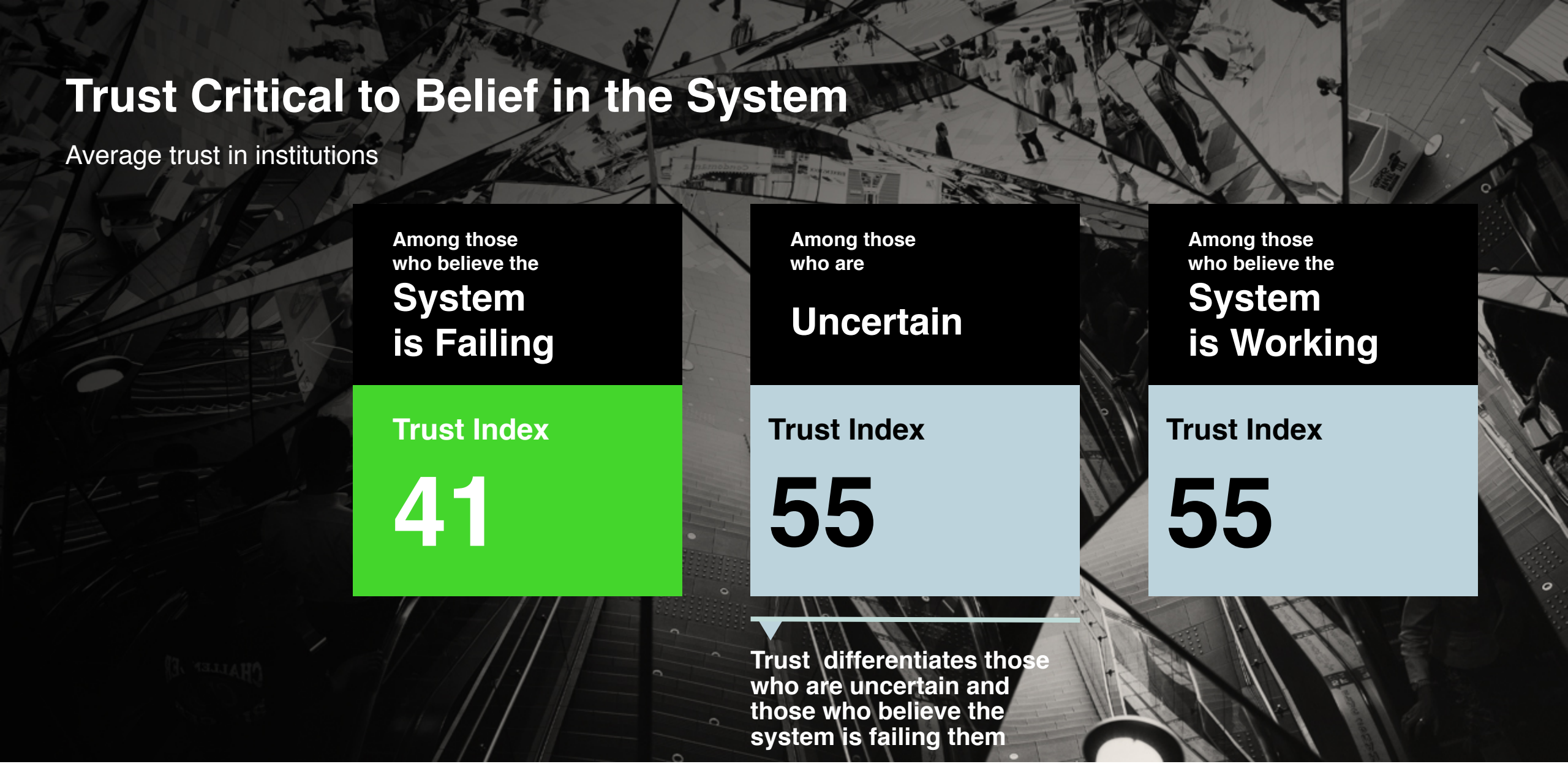


High-Income	College-Educated	Well-Informed
Top quartile of income	*College degree or higher*	*Follow business and public policy information several times a week or more*
48%	**49%**	**51%**

Source: 2017 Edelman Trust Barometer S8. Thinking about your annual household income in 2015, which of the following categories best describes your total household income that year? S7. What is the last grade in school you completed? S9. How often do you follow public policy matters in the news? S10. How often do you follow business news and information? General Population, 28-country global total, cut by 'system failing' measure. For details on how the "system failing" measure was calculated, please refer to the Technical Appendix.

Trust Critical to Belief in the System

Average trust in institutions



Among those who believe the System is Failing

Trust Index

41

Among those who are Uncertain

Trust Index

55

Among those who believe the System is Working

Trust Index

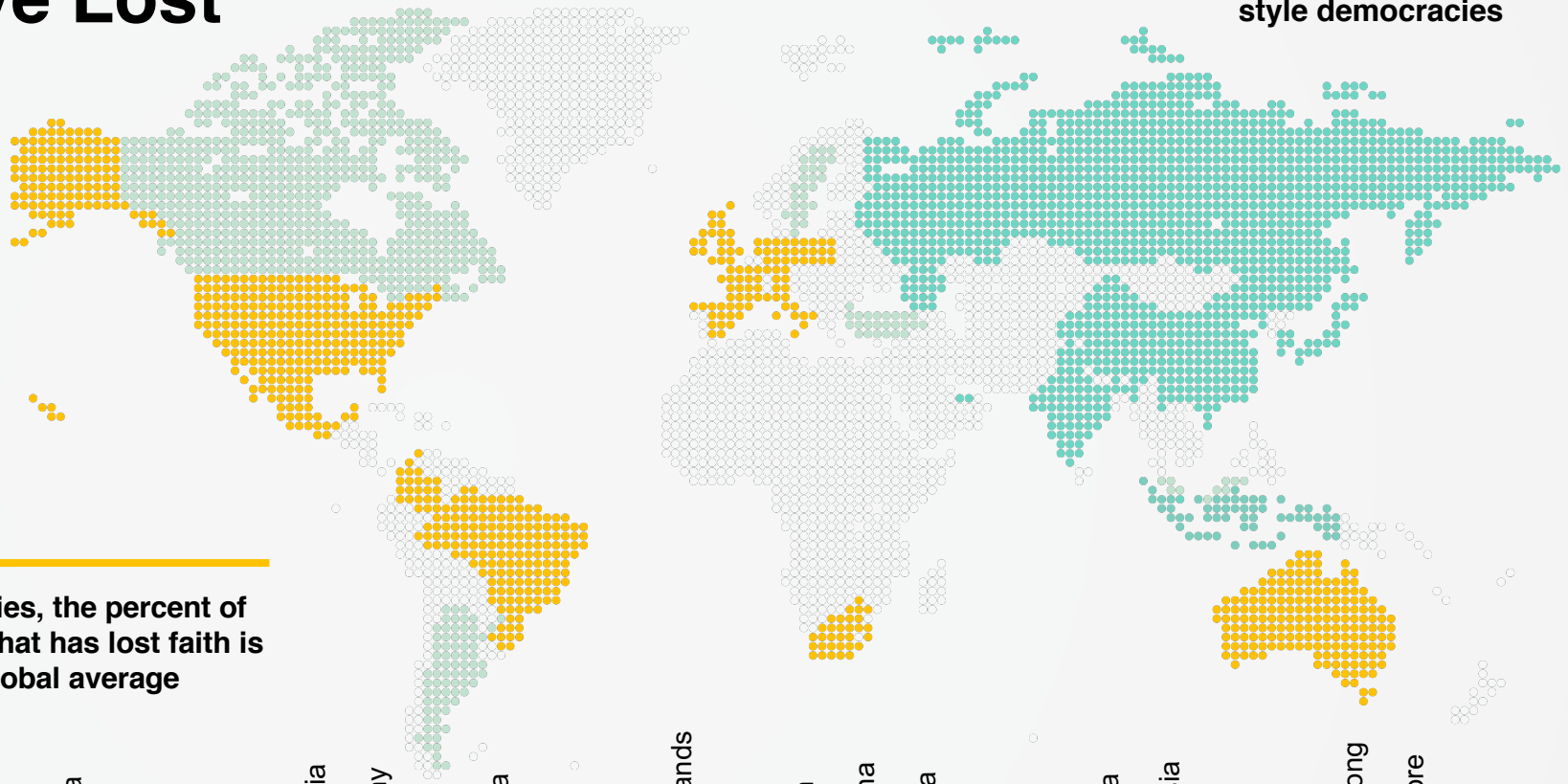
55

Trust differentiates those who are uncertain and those who believe the system is failing them

Source: 2017 Edelman Trust Barometer. Q11-Q14. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. General Population, 28-country global total, cut by 'the system is failing segments'.

1 in 2 Countries Have Lost Faith in the System

Percent of population who believe the system is not working



- Above global average
- Aligned with global average
- Below global average

	Global	France	Italy	Mexico	S. Africa	Spain	Poland	Brazil	Colombia	Germany	U.K.	Australia	Ireland	U.S.	Netherlands	Canada	Sweden	Argentina	Malaysia	Turkey	Russia	S. Korea	Indonesia	Japan	India	Hong Kong	Singapore	China	UAE
System failing	**53**	72	72	67	67	67	64	62	62	62	60	59	59	57	56	55	55	53	52	51	48	48	42	42	36	35	30	23	19
Uncertain	**32**	22	24	25	24	25	25	25	27	26	29	30	26	33	33	30	29	29	37	31	28	41	40	45	45	50	43	47	40

Source: 2017 Edelman Trust Barometer Q672-675, 678-680, 688-690.
For details on how the "system failing" measure was calculated, please refer to the Technical Appendix. The margin of error for the countries scores was added and subtracted from the global mean. Countries were considered above the global average if their score was higher than the global mean plus the margin of error. Countries were considered below the global average if their score was lower than the global mean minus the margin of error. All other scores were considered aligned.

Fears Fuel the Fire

The Cycle of Fear and Distrust

Concerns Have Become Fears

Percent of respondents who are concerned or fearful regarding each issue

Corruption

Widespread corruption

Compromising the safety of our citizens

Makes it difficult to institute the changes necessary to solve our problems

Globalization

Protect our jobs from foreign competition

Foreign companies/influence damaging our economy/ national culture

Foreign corporations favor their home country

Most countries cannot be trusted to engage in fair trade practices

Eroding Social Values

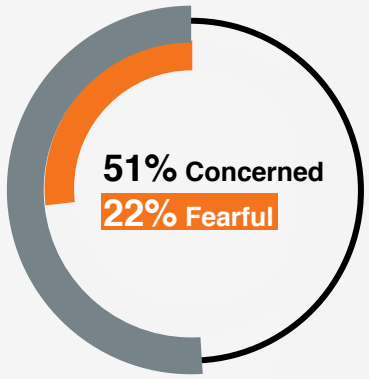
Values that made this country great are disappearing

Society changing too quickly and not in ways that benefit people like me

Immigration

Influx of people from other countries damaging our economy and national culture

Pace of Innovation



Technological innovations happening too quickly and leading to changes not good for people like me

Source: 2017 Edelman Trust Barometer. Corruption Q685-687, Globalization Q681-684, Eroding social values Q676 and Q758, Immigration Q685, Pace of innovation Q677.
For details on how the societal fears were measured, please refer to the Technical Appendix.

Fears Further Erode Belief in the System

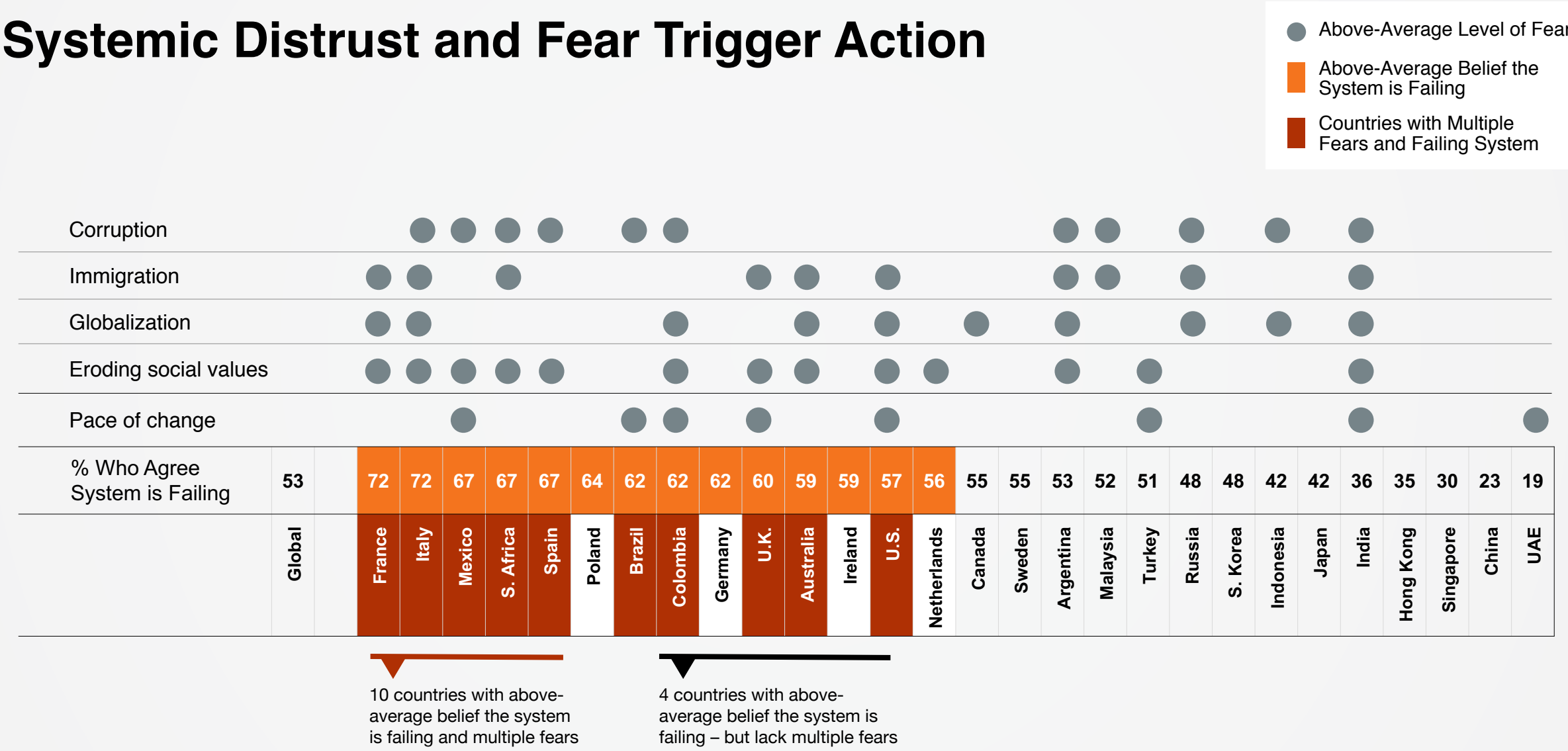
Percent of respondents with various fears who also believe the system has failed them

77	79	83	72	68
Corruption	Globalization	Eroding Social Values	Immigration	Pace of Innovation

When fears collide with a belief that the system is failing, conditions are ripe for populist action

Source: 2017 Edelman Trust Barometer. Corruption Q685-687, Globalization Q681-684, Eroding social values Q676 and Q758, Immigration Q685, Pace of innovation Q677. System is failing: Q672-675, 678-680, 688-690. For details on how the societal fears and the "system failing" measure were calculated, please refer to the Technical Appendix.

Systemic Distrust and Fear Trigger Action



Source: 2017 Edelman Trust Barometer. Corruption Q685-687, Globalization Q681-684, Eroding social values Q676 and Q758, Immigration Q685, Pace of innovation Q677. System is failing: Q672-675, 678-680, 688-690. For details on how the societal fears and the "system failing" measure were calculated, please refer to the Technical Appendix. The margin of error for the countries scores was added and subtracted from the global mean. Countries were considered above the global average if their score was higher than the global mean plus the margin of error.

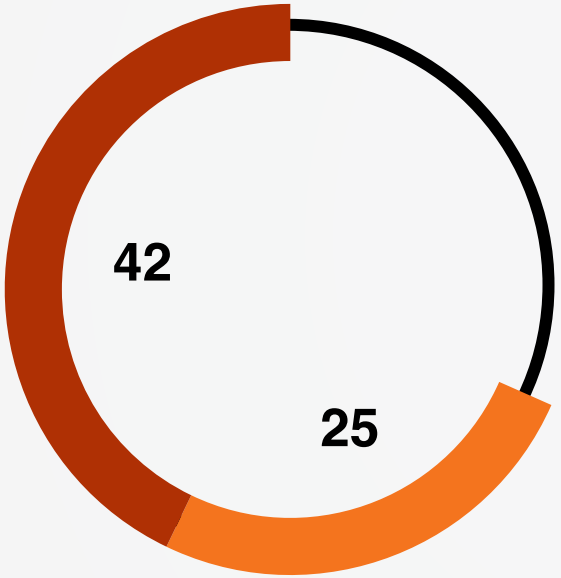
A Case in Point: U.S.

Trust Barometer Supplement: Post-U.S. Election Flash Poll,
1,000+ General Population Respondents, Nov. 28 to Dec. 11, 2016

System Failing and Fearful

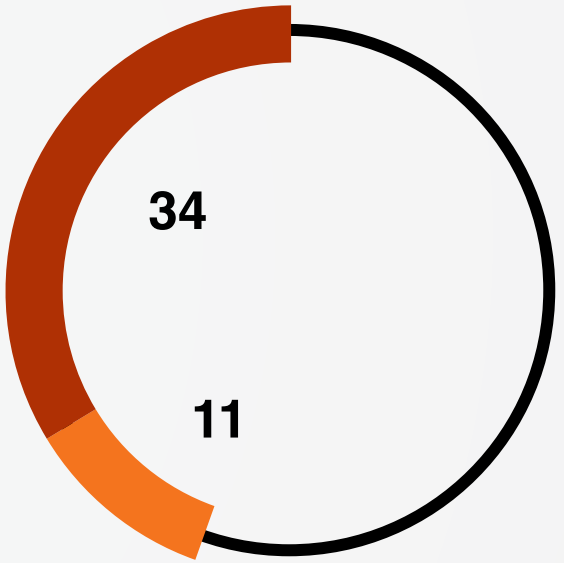
Fearful

Trump Voters



67%
are fearful

Clinton Voters



45%
are fearful

Source: 2017 Edelman Trust U.S. Flash Poll Q14. Who did you vote for? Audience: U.S. General Population, grouped by "system failing" segments and level of fear from the Trust Barometer. For details on how systemic distrust and societal fears were measured, please refer to the Technical Appendix. Respondents were labeled as "fearful" if they were fearful of at least one of the following societal issues: corruption, immigration, globalization, eroding social values, and pace of innovation.

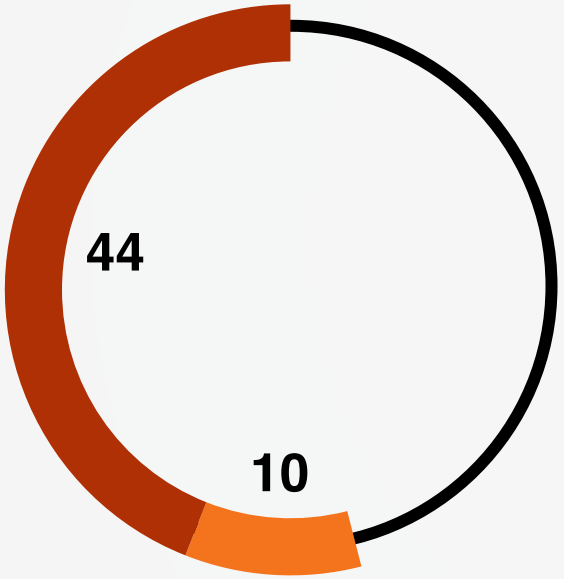
A Case in Point: U.K.

Trust Barometer Supplement: UK Supplement, 1,150 General Population Respondents, December 23, 2016 to January, 7 2017

System Failing and Fearful

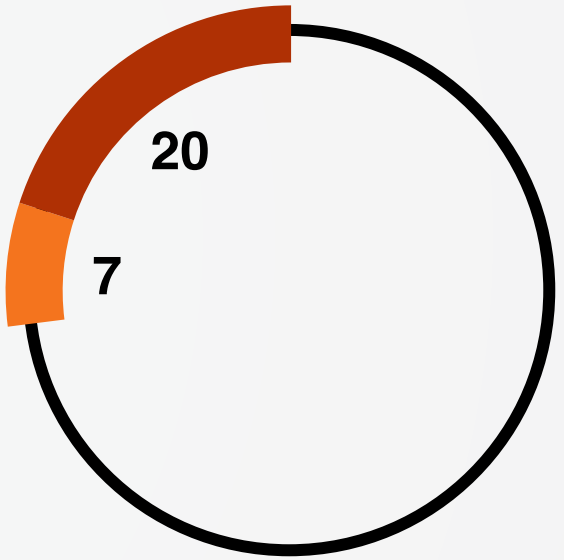
Fearful

Leave
the EU



54%
are fearful

Remain
in the EU

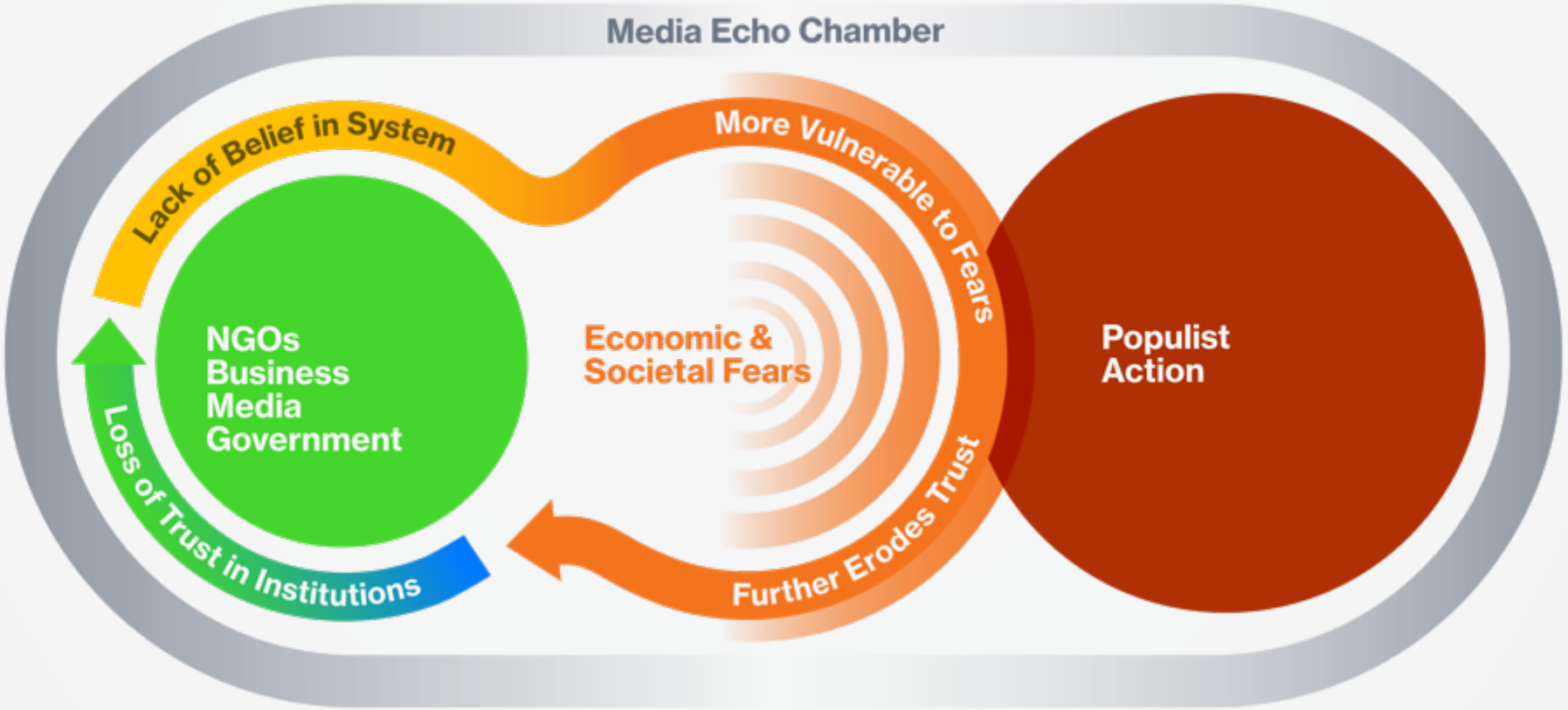


27%
are fearful

Source: 2017 UK Trust Supplement Q15. Did you vote…? Audience: UK General Population, grouped by 'system failing' segments and level of fear from the Trust Barometer. For details on how the societal fears and the "system failing" measure were calculated, please refer to the Technical Appendix. Respondents were labeled as 'fearful' if they were fearful of at least one of the following societal issues: corruption, immigration, globalization, eroding social values, and pace of innovation.

The Echo Chamber

Echo Chamber Amplifies Fears and Accelerates the Cycle



The Echo Chamber in Action

Facts matter less

Nearly

1 in 2 agree

"I would support politicians I trust to make things better for me and my family **even if they exaggerated the truth**"

Bias is the filter

53%

Do not regularly listen to people or organizations **with whom they often disagree**

Nearly

4x more likely

to **ignore information** that supports a position **they do not believe in**

No humans needed

More likely to believe

59% Search Engines

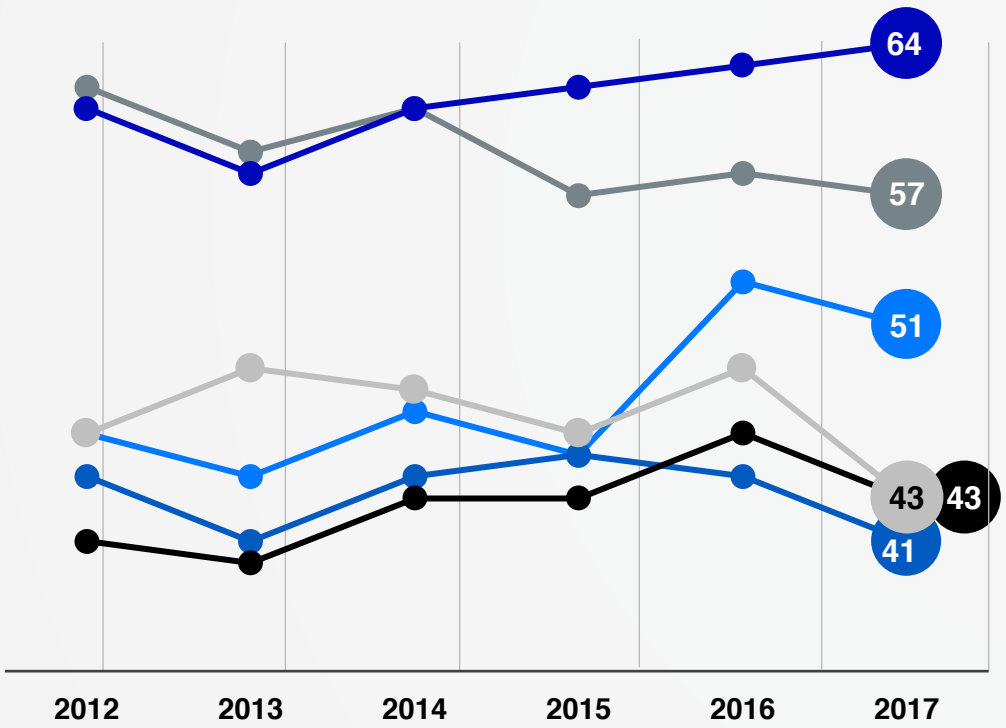
41% Human Editors

52% Never or rarely change their position on important social issues

Source: 2017 Edelman Trust Barometer Q709-718. For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree) Q755 Have you ever changed your position on an important social issue? (Sum of "Yes, but rarely," "No, never") General Population, 28-country global total. Q749. When someone you know provides you with some information that supports a position that you do NOT believe, which of following do you typically do with it? Q752. How often do you read or listen to information or points of view from people, media sources or organizations with whom you often disagree? (Sum of "Never," "Almost Never," "Several Times a year," "Once or Twice a Month") Q754. You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. For each pair, we want you to choose **the one that you are more likely to believe is giving you the truth**. While we know that some of these choices may not be easy, please do your best to select only one of the two options given--the one that is most likely to be true most often. General Population, 28-country global total, question asked of half the sample.

Traditional Media Shows Steepest Decline

Percent trust in each source for general news and information



	2012	2017	Change, 2012 - 2017
Search engines*	61	64	+3
Traditional media	62	57	-5
Online-only media**	46	51	+5
Owned media	41	43	+2
Social media	44	41	-3
Media as an institution	**46**	**43**	**-3**

Traditional media down 5 points

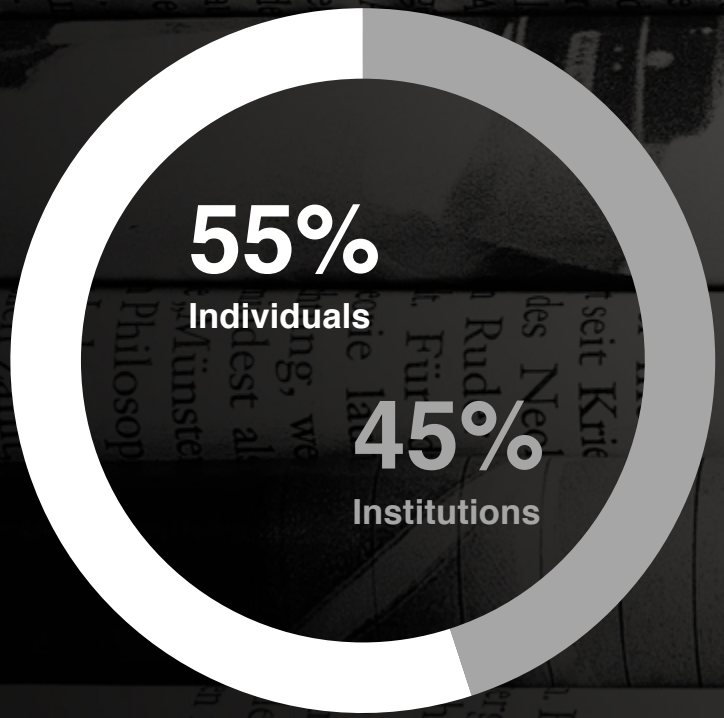
Owned media now as trusted as media as an institution

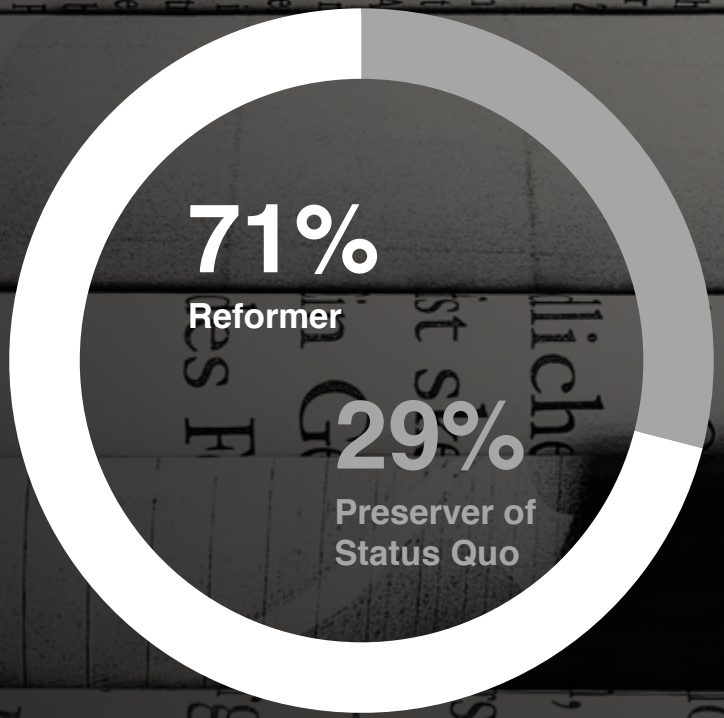
Source: 2017 Edelman Trust Barometer Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal." (Top 4 Box, Trust) General Population, 25-country global total, question asked of half the sample.

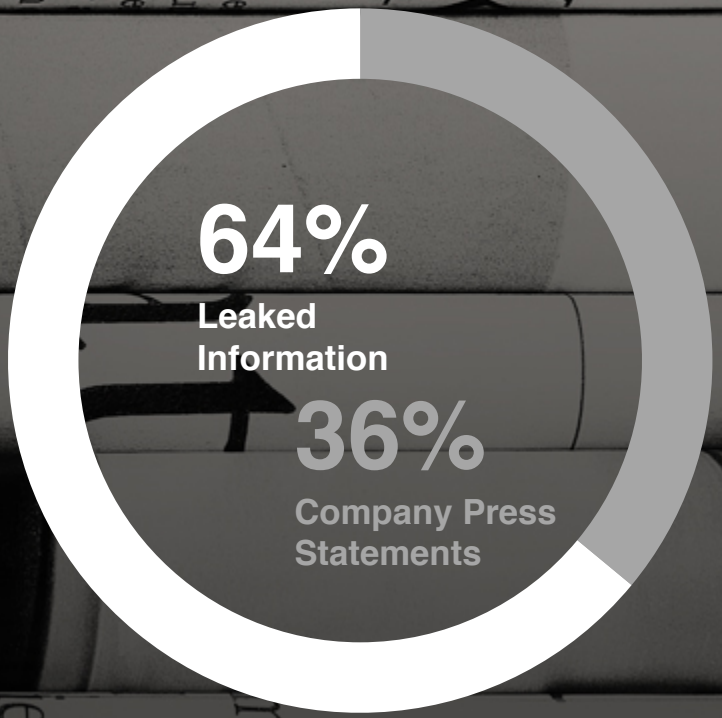
*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."
**From 2012-2015, "Hybrid Media" was included as a media type. In 2016, this was changed to "Online-Only media."

Official Sources Are Suspect

Percent who find each source more believable than its pair







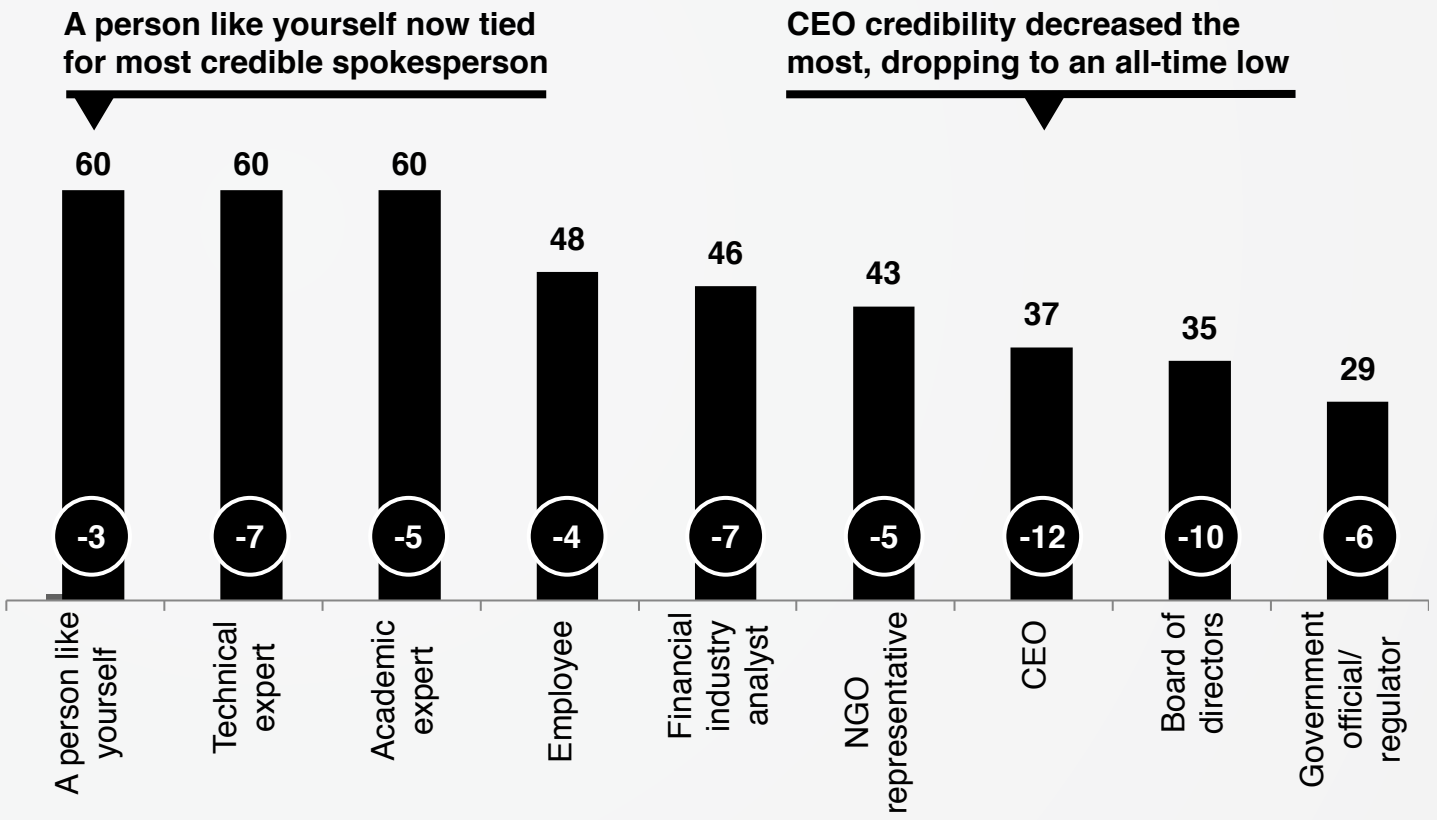
Source: 2017 Edelman Trust Barometer Q754. You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. For each pair, we want you to choose the one that you are more likely to believe is giving you the truth. While we know that some of these choices may not be easy, please do your best to select only one of the two options given--the one that is most likely to be true most often. General Population, 28-country global total, choices shown to half the sample.

Peers Now as Credible as Experts

Percent who rate each spokesperson as extremely/very credible, and change from 2016 to 2017

– + Y-to-Y Change

> **"People in this country have had enough of experts."**
>
> **– Michael Gove, Member of Parliament, U.K.**

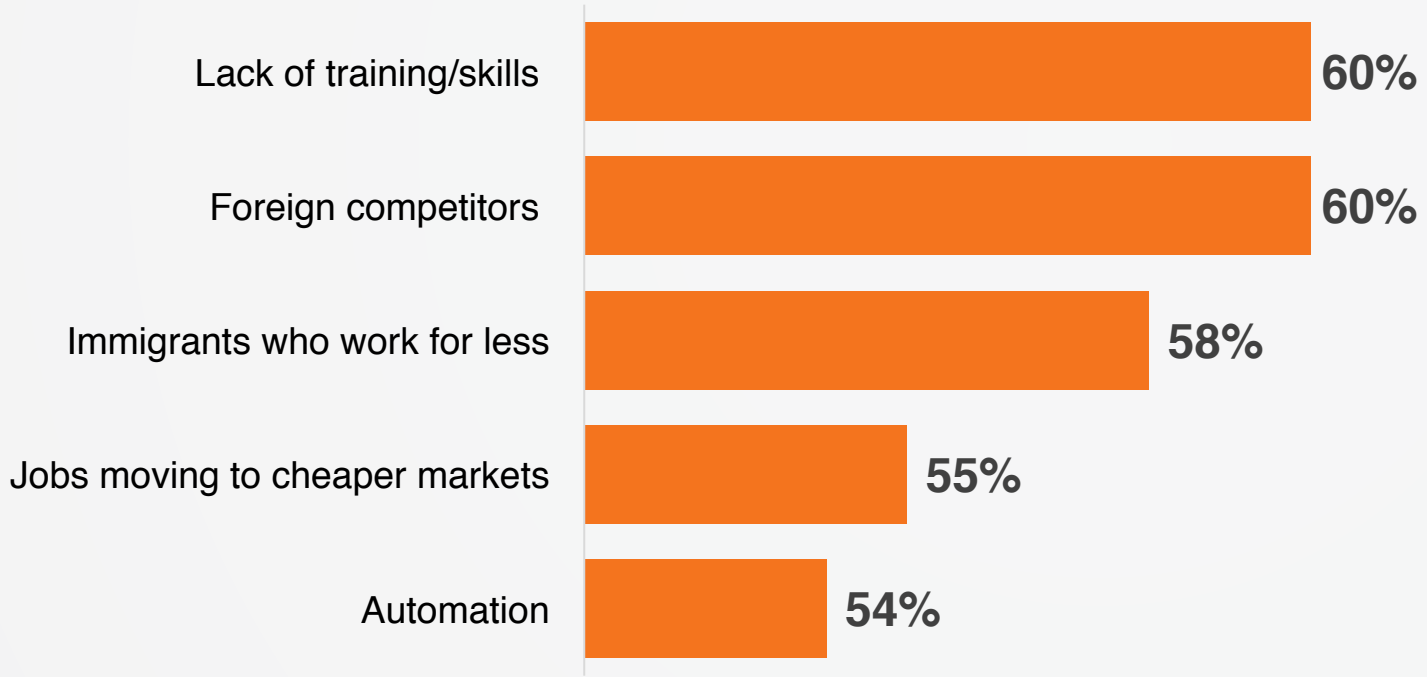


Source: 2017 Edelman. Trust Barometer Q130-747 Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible) General Population, 28-country global total, question asked of half the sample.

Business on Notice

Business Plays a Role in Stoking Societal Fears

Global population worries about
losing their jobs due to:



53% the pace of change

in business and industry is
too fast

50% globalization

is taking us in the
wrong direction

Source: 2017 Edelman Trust Barometer Q693-762. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? Please indicate your answer using a nine point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". (Top 4 Box, Worried) Q709-718. For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree) General Population, 28-country global total. Q349-671. For the statements below, please think about the pace of development and change and select the response that most accurately represents your opinion. (Top 4 Box, Too Fast) General Population, 28-country global total, question asked of half the sample.

Support for Anti-Business Policies

Protectionism

Nearly **1 in 2** agree

"We should not enter into free trade agreements because they hurt our country's workers."

Protectionism

69% agree

"We need to prioritize the interests of our country over those of the rest of the world."

Slower Growth

72% agree

"The government should protect our jobs and local industries, even if it means that our economy grows more slowly."

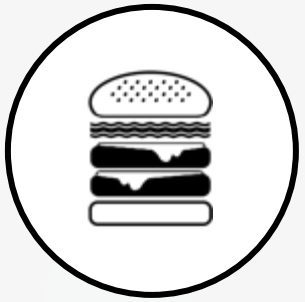
Source: 2017 Edelman. Trust Barometer Q709-718 For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree) General Population, 28-country global total.

License to Operate at Risk

82%

agree that the pharmaceutical industry needs more regulations

Regulation



70%

agree that policy makers should tax foods that negatively impact health

Tax Policy

53%

do not agree that financial market reforms have increased economic stability

Reform

Source: 2017 Edelman Trust Barometer Q667-670. For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree) Q661-664. For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree) Q658. For the statement below, please indicate how much you agree or disagree. (All respondents except Top 4 Box, Agree) General Population, 28-country global total, question asked of one-fifth the sample.

Business Expected to Lead

75% agree

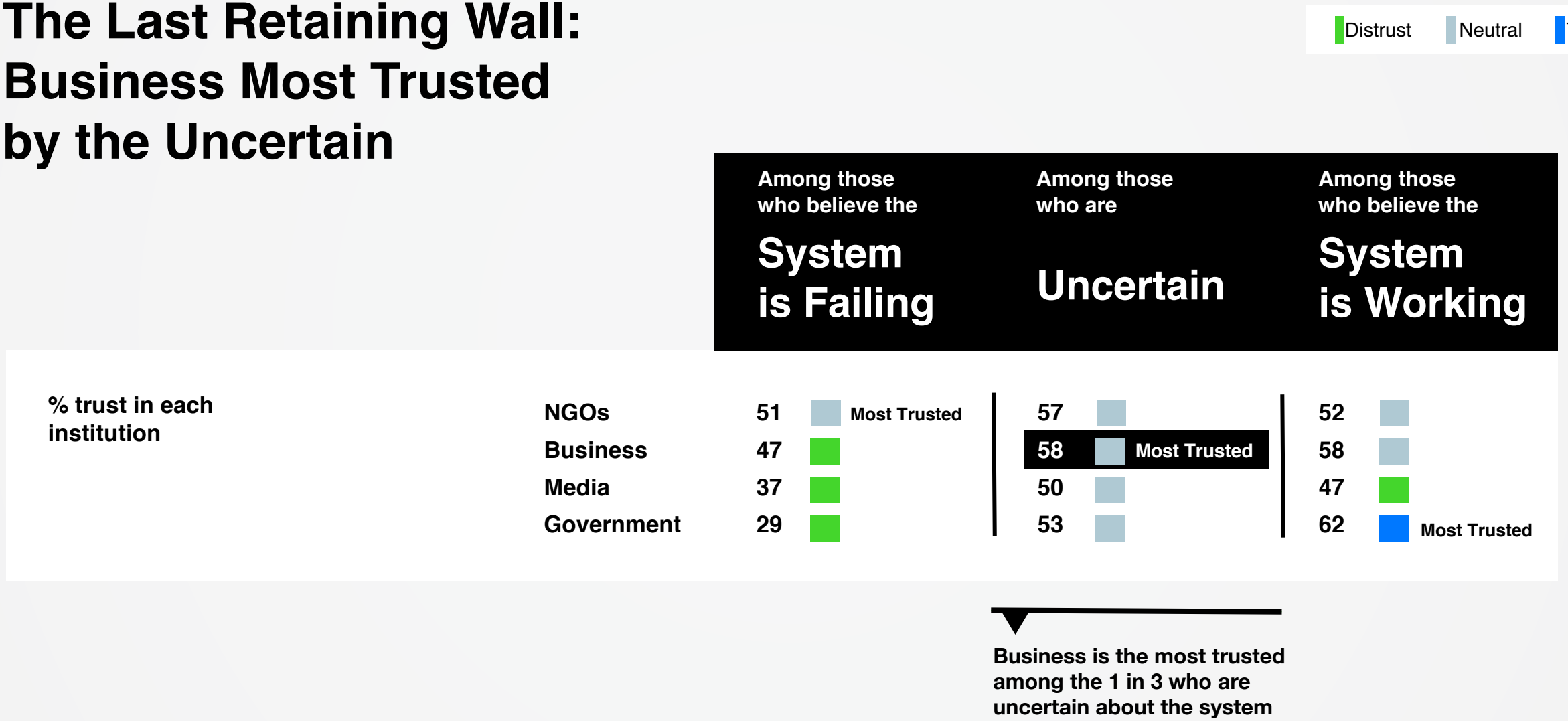
“A company can take specific actions that both increase profits and improve the economic and social conditions in the community where it operates.”

Source: 2017 Edelman Trust Barometer Q249-757. Please indicate how much you agree or disagree with the following statements. (Top 4 Box, Agree). General Population, 28-country global total, question asked of half the sample.

.

Business
Must Act

The Last Retaining Wall: Business Most Trusted by the Uncertain



Source: 2017 Edelman Trust Barometer Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". (Top 4 Box, Trust) General Population, 28-country global total, cut by "the system is failing' segments. Q672-675, 678-680, 688-690. For details on how the "system failing" measure was calculated, please refer to the Technical Appendix.

First, Do No Harm

Actions business can take that would most damage trust in a better future (top 5 most-selected)

1. Pay bribes to government officials to win contracts

2. Pay executives hundreds of times more than workers

3. Move profits to other countries to avoid taxes

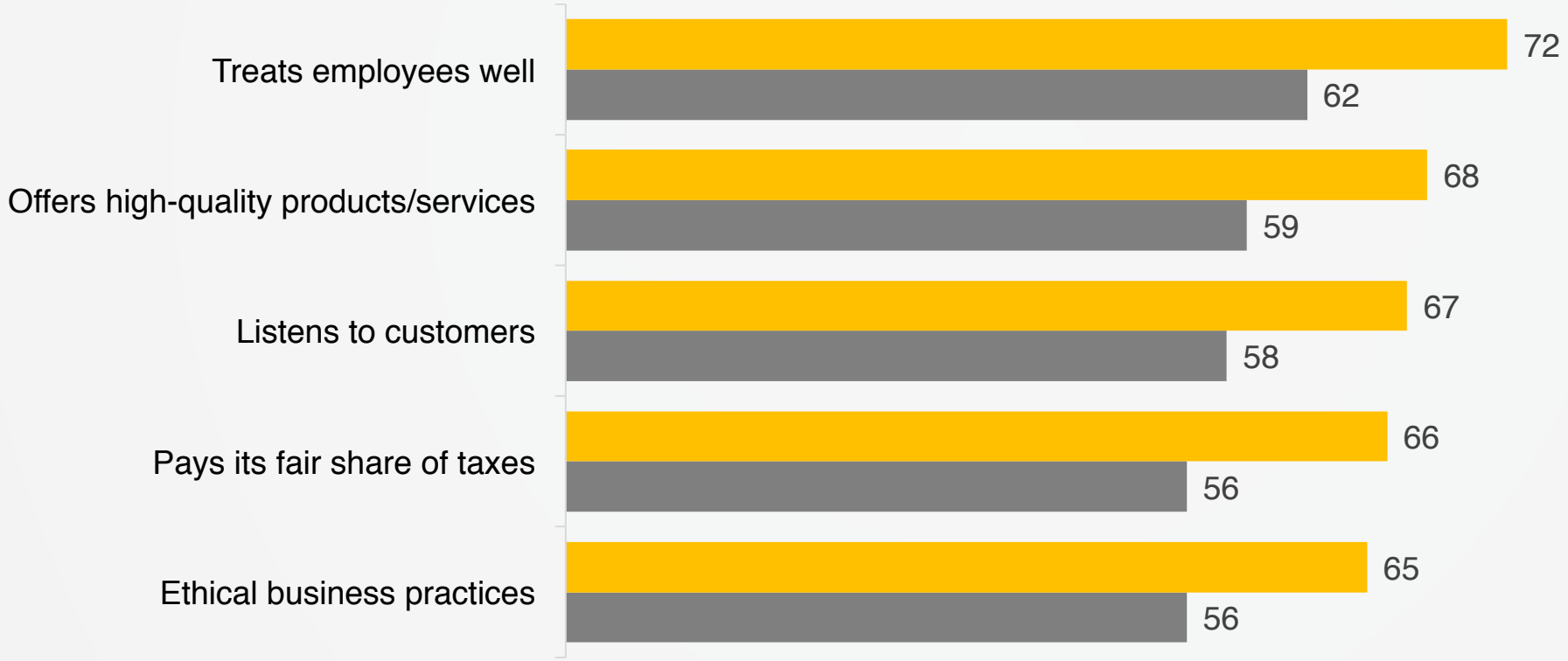
4. Overcharge for products that people need to live

5. Reduce costs by lowering product quality

Source: 2017 Edelman Trust Barometer. Q732. What can businesses do that would cause the most **damage to your trust** in a better future? *(Please select up to five.)* General Population, 28-country global total, question asked of half the sample.

When the System is Failing, Companies Must Do More

Percent who rate each attribute as important in **building trust in a company** (top 5 most important shown)



On average

+9 pts

higher expectations

Among those who have lost faith in the system, expectations are higher across the board

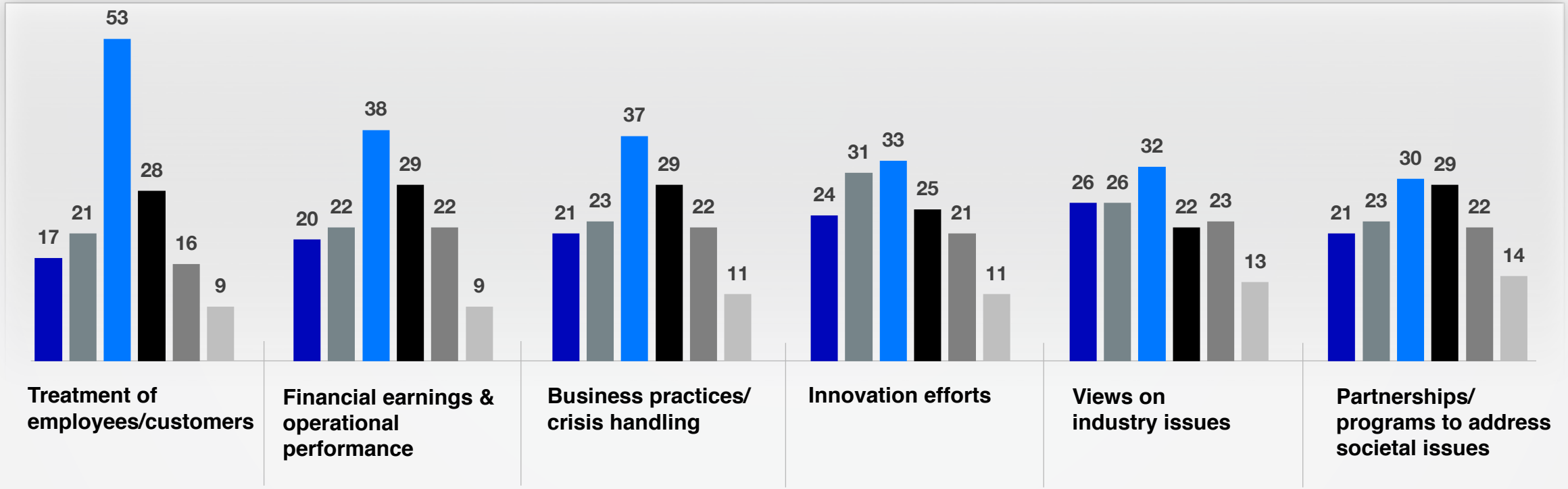
Source: 2017 Edelman Trust Barometer Q80-639. How important is each of the following attributes to building your TRUST in a company? Use a 9-point scale where one means that attribute is "not at all important to building your trust" and nine means it is "extremely important to building your trust" in a company. (Top 2 Box, Importance) Data displayed is mean Top 2 Box rating for the listed items. Items were included if they were considered important by 50% or more of those who believe the system is failing. General Population and cut by "the system is failing segments", 28-country global total. Q672-675, 678-680, 688-690. For details on how the "system failing" measure was calculated, please refer to the Technical Appendix.

And Do Things Differently

Source: 2017 Edelman Trust Barometer

Employees Most Credible

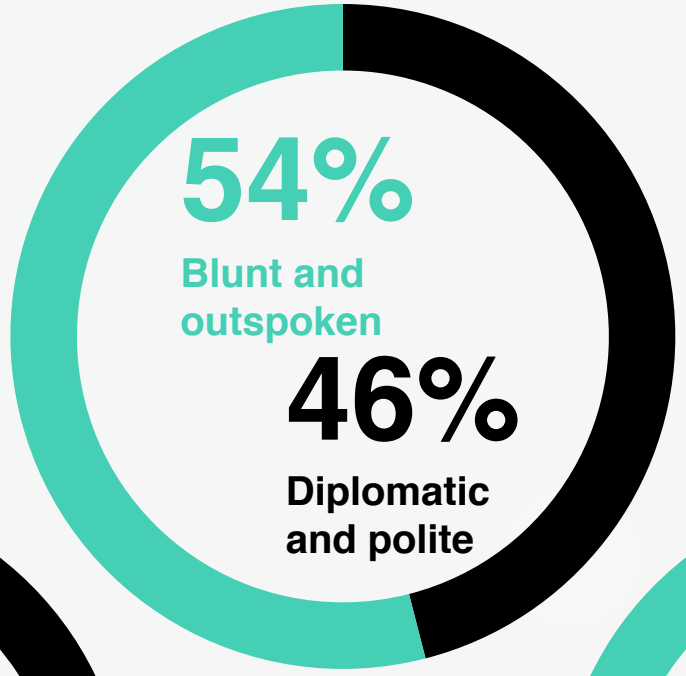
Most trusted spokesperson to communicate each topic

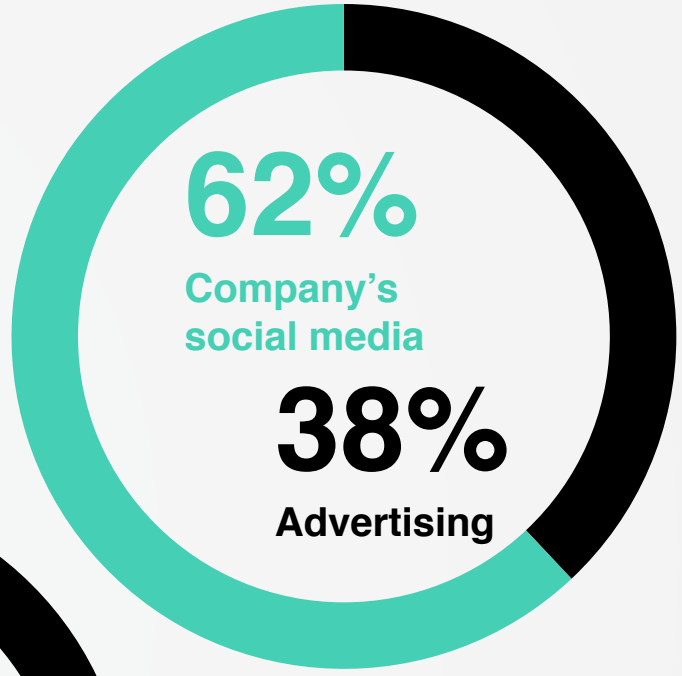


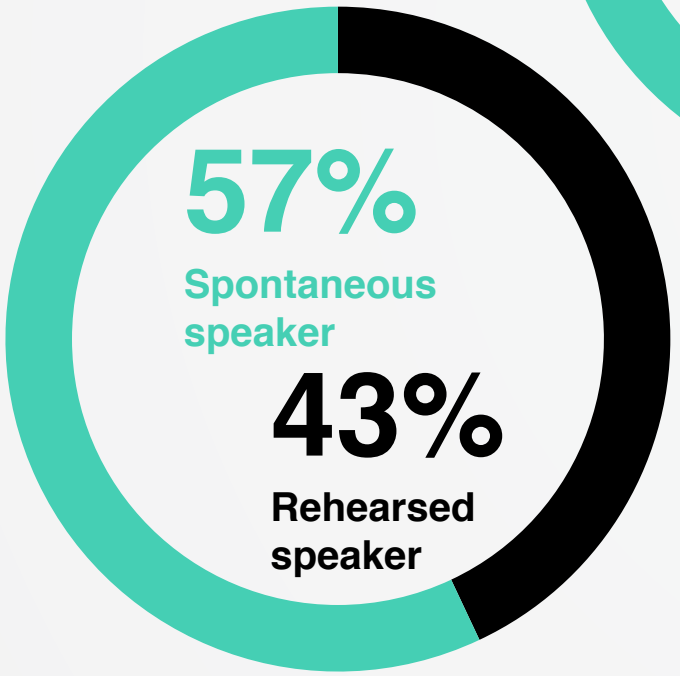
Source: 2017 Edelman Trust Barometer Q610. Who do you trust MOST to provide you with credible and honest information about a company's financial earnings and operational performance, and top leadership's accomplishments? Q611. A company's business practices, both positive and negative, and its handling of a crisis? Q612. A company's employee programs, benefits and working conditions, and how a company serves its customers and prioritizes customer needs ahead of company profits? Q613. A company's partnerships with NGOs and effort to address societal issues, including those to positively impact the local community? Q614. A company's innovation efforts and new product development? Q615. A company's stand on issues related to the industry in which it operates? General Population, 28-country global total, question asked of one-quarter of the sample.

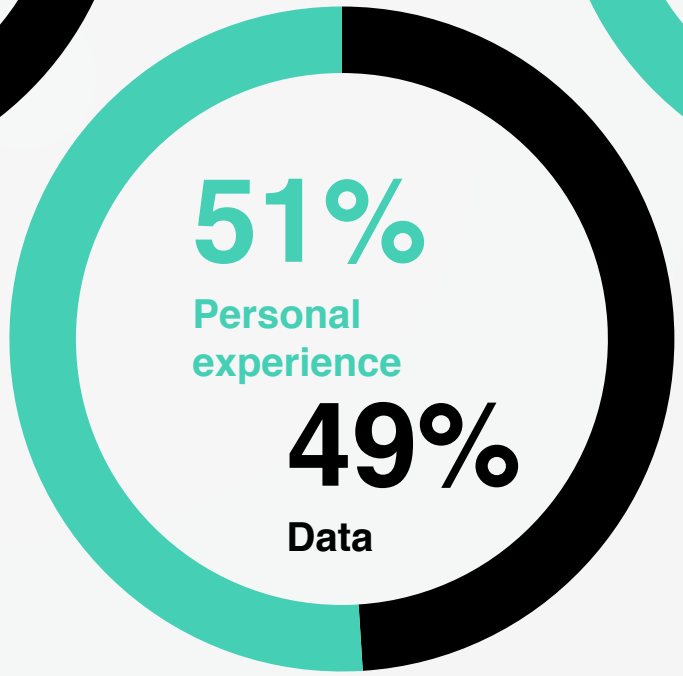
Talk With, Not At

Which is more believable?









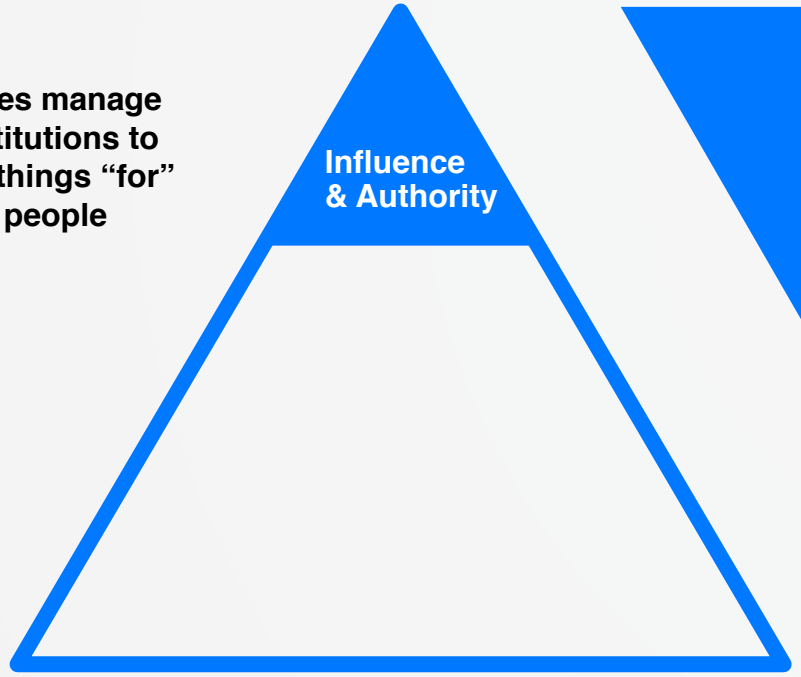
Source: 2017 Edelman Trust Barometer Q754. You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. For each pair, we want you to choose the one that you are more likely to believe is giving you the truth. While we know that some of these choices may not be easy, please do your best to select only one of the two options given-the one that is most likely to be true most often. General Population, 28-country global total, choices shown to half the sample.

With the People,
Not For the People

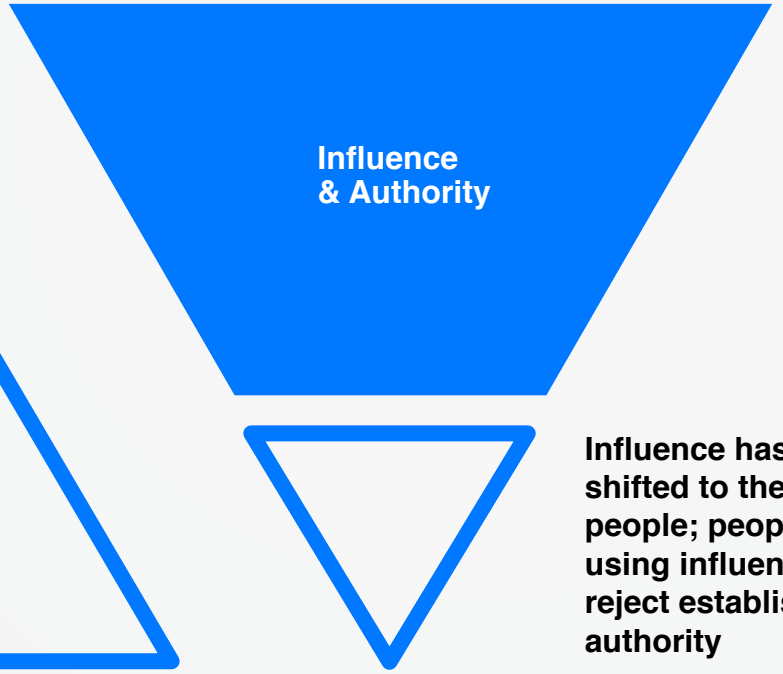
A Fundamental Shift

Old Model: *For* the People

Elites manage institutions to do things "for" the people

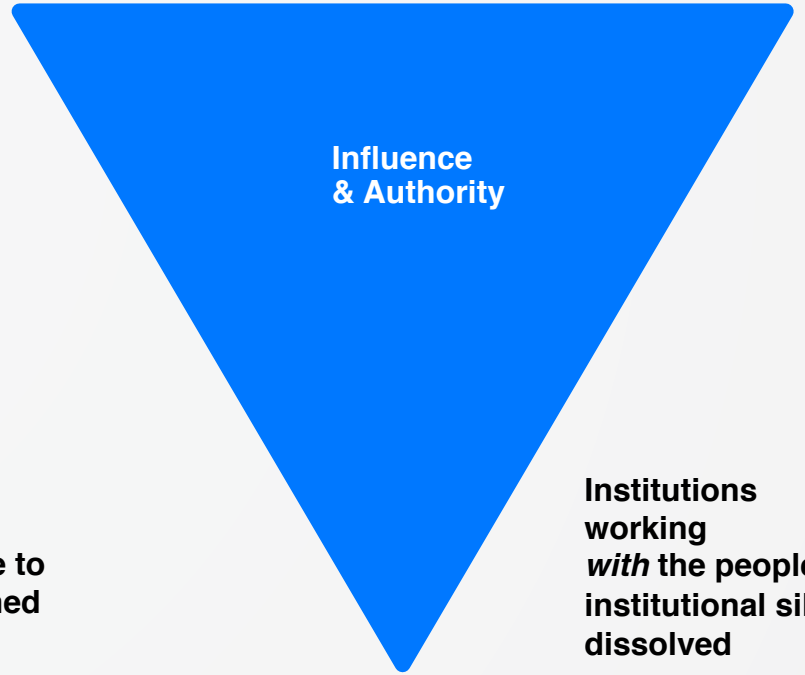


Current Tension



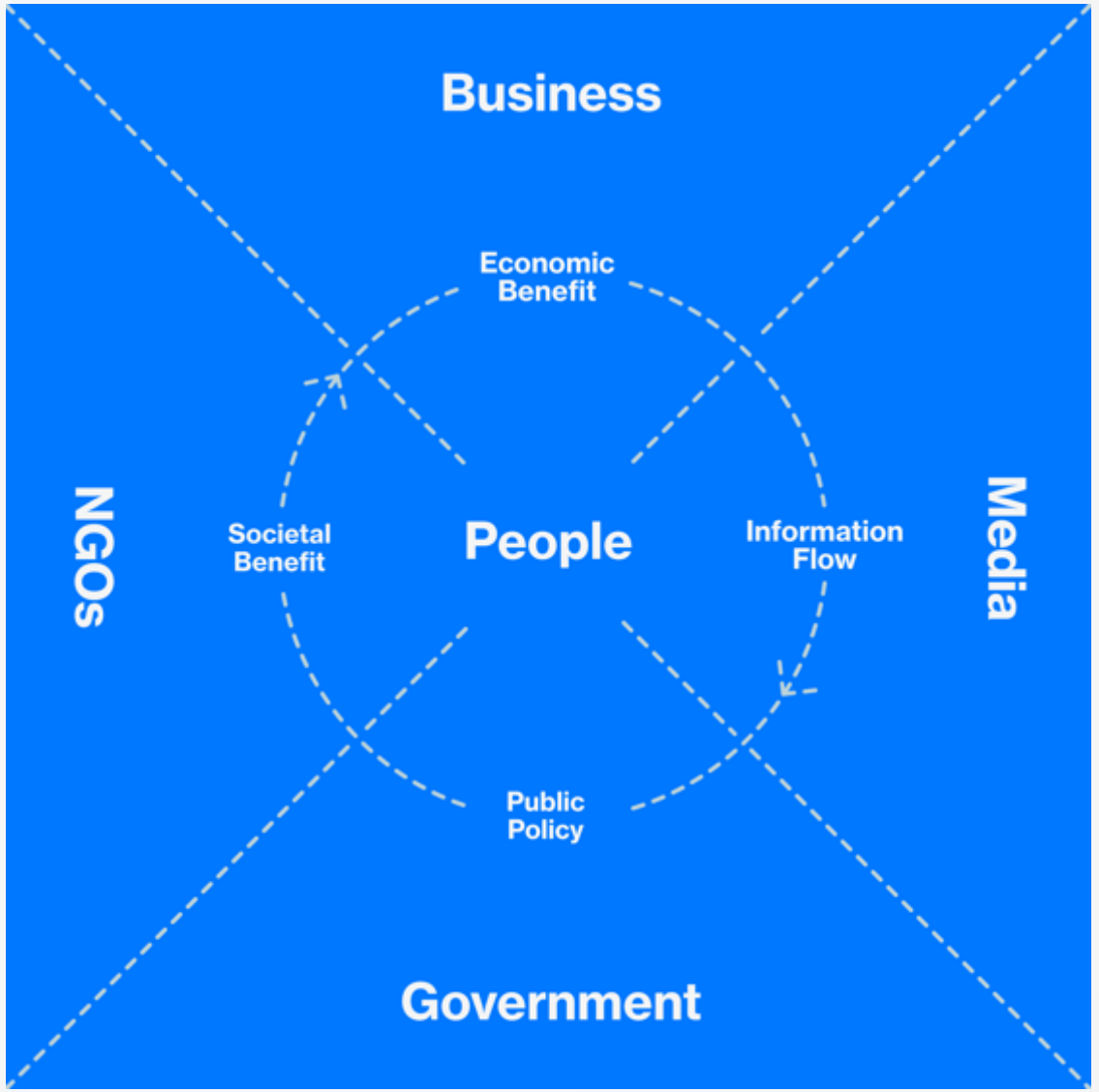
Influence has shifted to the people; people using influence to reject established authority

New Model: *With* the People



Institutions working *with* the people; institutional silos dissolved

With the People: The New Integrated Operating Model



Thank You

Edelman trustbarometer 2017 | ANNUAL GLOBAL STUDY

Edelman

Technical Appendix

2017 Edelman Trust Barometer

Table of Contents

2017 Edelman Trust Barometer Technical Appendix

1. Why Edelman studies trust
2. The trust-building attributes
3. Methodology
4. The sample
5. How we measured: belief that the system is failing
6. How we measured: societal and economic fears
7. About the research team
8. About the social policy team

Why Edelman Studies Trust

In modern society, we delegate important aspects of our well-being to the four institutions of business (economic well-being), government (national security and public policy), media (information and knowledge) and NGOs (social causes and issues).

In order to feel safe delegating important aspects of our lives and well-being to others, we need to trust them to act with integrity and with our best interests in mind. Trust, therefore, is at the heart of an individual's relationship with an institution and, by association, its leadership.

If trust in these institutions breaks down, we begin to fear that we are no longer in safe, reliable hands. Without trust, the fabric of society can unravel to the detriment of all.

From an institutional standpoint, trust is a forward-looking metric. Unlike reputation, which is based on an organization's historical behavior, trust is a predictor of whether stakeholders will find you credible in the future, will embrace new innovations you introduce and will enthusiastically support you.

For these reasons, trust is a valuable asset for all institutions, and ongoing trust-building activities should be one of the most important strategic priorities for every organization.

The Trust-Building Attributes

Each year, we ask respondents to rate the importance of a series of attributes in building trust in a company, and how well companies are performing against them. These can be grouped into five clusters: Integrity, Engagement, Products, Purpose and Operations. These original 16 trust-building attributes are shown on the next slide.

In 2017, we explored additional dimensions to building trust in a company. These new dimensions fall into five areas, shown on the following slide: Employee Engagement, Diversity, Citizenship, Leadership and Relationship-Building.

The Trust-building Attributes

Company Importance vs. Performance

	% Importance	% Performance	Gap
Integrity	**56**	**39**	**17**
Has ethical business practices	56	40	16
Takes responsible actions to address an issue or a crisis	55	39	16
Has transparent and open business practices	55	39	16
Engagement	**56**	**40**	**16**
Treats employees well	62	43	19
Listens to customer needs and feedback	58	41	17
Places customers ahead of profits	55	38	17
Communicates frequently and honestly on the state of its business	52	37	15
Products	**51**	**41**	**10**
Offers high quality products or services	59	44	15
Is an innovator of new products, services or ideas	44	39	5
Purpose	**45**	**34**	**11**
Works to protect and improve the environment	52	38	14
Creates programs that positively impact the local community	46	36	10
Addresses society's needs in its everyday business	46	35	11
Partners with NGOs, government and third parties to address societal issues	37	30	7
Operations	**40**	**34**	**6**
Has highly-regarded and widely admired top leadership	42	34	8
Ranks on A global list of top companies, such as best to work for or most admired	38	34	4
Delivers consistent financial returns to investors	38	34	4

Source: 2017 Edelman Trust Barometer Q80-95. How important is each of the following attributes to building your TRUST in a company? Use a 9-point scale where one means that attribute is “not at all important to building your trust” and nine means it is “extremely important to building your trust” in a company. (Top 2 Box, Importance) Q114-129. Please rate businesses in general on how well you think they are performing on each of the following attributes. Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". (Top 2 Box, Performance) General Population, 28-country global total.

Additional Dimensions that Inform Business Trust

Company Importance vs. Performance

	% Importance	% Performance	Gap
Employee Empowerment	**40**	**31**	**9**
Empowers its employees to make decisions	41	32	9
Regular employees have a lot of influence in how the company is run	37	30	7
Supports employees joining worker's/trade unions or other organizations that represent their interests	42	31	11
Diversity	**37**	**31**	**6**
Has a lot of ethnic diversity within its management team	34	30	4
Has a lot of gender diversity within its management team	36	30	6
Has a lot of diversity when it comes to attitudes, values and points of view within its management team	40	32	8
Citizenship	**50**	**38**	12
It creates many new jobs	47	38	**9**
The profits it makes in this country stay in this country	46	36	10
Pays its fair share of taxes	56	41	15
Leadership	**38**	**31**	**7**
The CEO gets personally involved in societal issues	39	31	8
The CEO is compensated based on the ability to produce sustainable, long-term growth	40	33	7
I know who the CEO is and what he or she stands for	36	29	7
Relationship Building	**42**	**33**	9
Invites the public to contribute to and help shape their products, services or policies	40	32	**8**
Has a public image or heritage that I can appreciate and relate to	42	34	8
Actively encourages and facilitates conversations and interactions with the public	43	34	9

Source: 2017 Edelman Trust Barometer Q625-639. How important is each of the following attributes to building your TRUST in a company? Use a 9-point scale where one means that attribute is "not at all important to building your trust" and nine means it is "extremely important to building your trust" in a company. (Top 2 Box, Importance) Q640-654. Please rate businesses in general on how well you think they are performing on each of the following attributes. Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". (Top 2 Box, Performance) General Population, 28-country global total.

Methodology

2017 Edelman Trust Barometer

Online Survey in 28 Countries

17 years of data

33,000+ respondents total

All fieldwork was conducted between October 13th and November 16th, 2016

General Online Population

6 years in 25+ markets

Ages 18+

1,150 respondents per country

All slides show General Online Population unless otherwise noted

Informed Public

9 years in 20+ markets

Represents 13% of total global population

500 respondents in U.S. and China; 200 in all other countries

Must meet 4 criteria:

- Ages 25-64
- College educated
- In top 25% of household income per age group in each country
- Report significant media consumption and engagement in business news

Mass Population

All population not including Informed Public

Represents 87% of total global population

28-country global data margin of error: General Population +/-0.6% (N=32,200), Informed Public +/- 1.2% (N=6,200), Mass Population +/- 0.6% (26,000+). Country-specific data margin of error: General Population +/- 2.9 (N=1,150), Informed Public +/- 6.9% (N = min 200, varies by country), China and U.S. +/- 4.4% (N=500), Mass Population +/- 3.0 to 3.6 (N =min 740, varies by country), half sample Global General Online Population +/- 0.8 (N=16,100).

Sample Size, Quotas and Margin of Error

2017 Edelman Trust Barometer

	General Population			Informed Public		
	Sample Size	**Quotas Set On***	**Margin of Error**	**Sample Size****	**Quotas Set On*****	**Margin of Error**
Global	**32,200**	**Age, Gender, Region**	**+/- 0.6% total sample +/- .08% split sample**	**6,200**	**Age, Education, Gender, Income**	**+/- 1.2% total sample +/- 1.8% split sample**
China and U.S.	1,150	Age, Gender, Region	+/- 2.6% total sample +/- 4.1% split sample	500	Age, Education, Gender, Income	+/- 4.4% total sample +/- 6.2% split sample
All other countries	1,150	Age, Gender, Region	+/- 2.6% total sample +/- 4.1% split sample	200	Age, Education, Gender, Income	+/- 6.9% total sample +/- 9.8% split sample

* In U.S., U.K. and UAE, there were additional quotas on ethnicity.
** Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.
*** In the UAE there was an additional quota on ethnicity.

Languages and Internet Penetration by Country

2017 Edelman Trust Barometer

The Edelman Trust Barometer is an online survey. In developed countries, a nationally representative online sample closely mirrors the general population. In countries with lower levels of Internet penetration, a nationally-representative online sample will be more affluent, educated, and urban than the general population.

	Languages	Internet Penetration*
Global	-	50%
Argentina	Localized Spanish	79%
Australia	English	92%
Brazil	Portuguese	68%
Canada	English & French Canadian	93%
China	Simplified Chinese	52%
Colombia	Localized Spanish	59%
France	French	84%
Germany	German	88%
Hong Kong	English & Traditional Chinese	80%

	Languages	Internet Penetration*
India	Hindi & English	37%
Indonesia	Indonesian	51%
Ireland	English	83%
Italy	Italian	62%
Japan	Japanese	91%
Malaysia	Malay	68%
Mexico	Localized Spanish	56%
Netherlands	Dutch & English	96%
Poland	Polish	68%
Russia	Russian	71%

	Languages	Internet Penetration*
Singapore	English & Simplified Chinese	81%
South Africa	English & Afrikaans	53%
South Korea	Korean	92%
Spain	Spanish	77%
Sweden	Swedish & English	95%
Turkey	Turkish	60%
UAE	Arabic & English	92%
U.K.	English	92%
U.S.	English	89%

*Data source: http://www.internet worldstats.com/stats.htm.

How Did We Measure if People Believed the System is Failing Them?

Four dimensions were examined to determine whether or not respondents believe the system is failing them:

1) A sense of injustice stemming from the perception that society's elites have co-opted the system to their own advantage at the expense of regular people,
2) A lack of hope that the future will be better for you and your family,
3) A lack of confidence in the leaders of societal institutions to solve the country's problems, and
4) A desire for forceful reformers in positions of power that are capable of bring about much-needed change.

Respondents were asked:

For each one, please rate how **true** you believe that statement is using a nine-point scale where one means it is "**not at all true**" and nine means it is "**completely true**".

Sense of Injustice Items

"The elites who run our institutions are out of touch with regular people" *Q678*

"The elites who run our institutions are indifferent to the will of the people" *Q672*

"As regular people struggle just to pay their bills, the elites are getting richer than they deserve" *Q673*

"The system is biased against regular people and in favor of the rich and powerful" *Q674*

Lack of Hope Items

"My hard work will be rewarded" (reverse scored) *Q688*

"My children will have a better life than I do" (reverse scored) *Q689*

"The country is moving in the right direction" (reverse scored) *Q690*

Lack of Confidence Items

"I do not have confidence that our current leaders will be able to address our country's challenges" *Q680*

Desire for Change Items

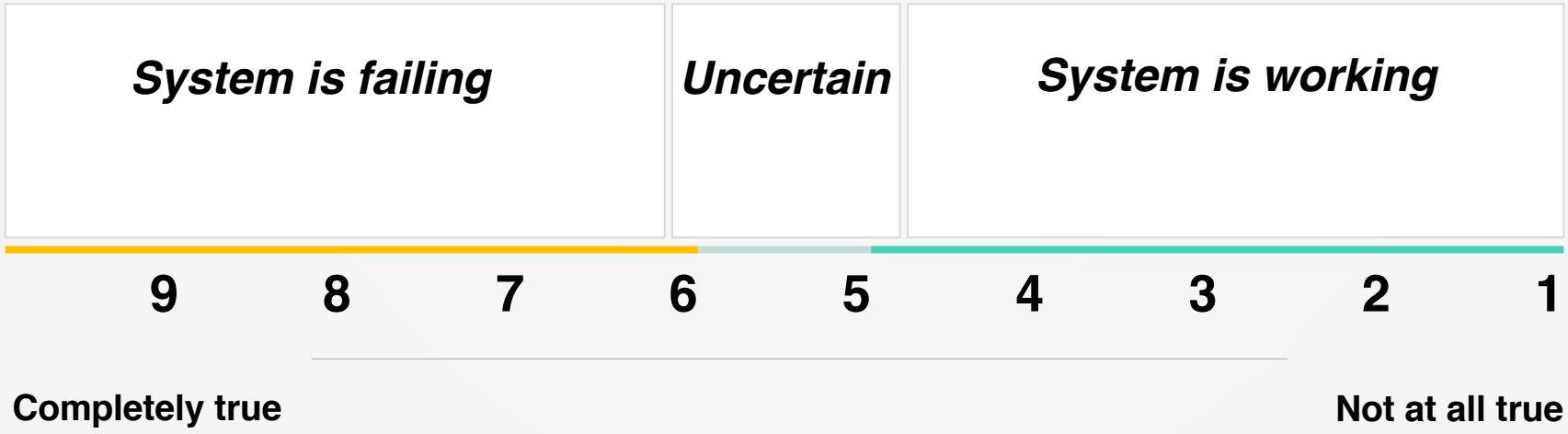
"We need forceful reformers in positions of power to bring about much-needed change" *Q679*

How Did We Categorize People Based on Their Perceptions of the System?

Overall system perception scores were calculated by taking the average of the nine item scores.

Respondents were categorized into one of three segments based their mean score:

- Those who averaged 6.00 or higher believe the ***system is failing*** them
- Those who averaged between 5.00 and 5.99 were labelled as ***uncertain***
- Those who averaged less than 5.00 believe the ***system is working***



How Reliable is the System Failing Measure?

Alpha Reliability analyses were performed globally and within each of the 28 countries. Results indicated that the scale was reliable in every market and that all of the items tap into different aspects of the same underlying construct.

Note: Alpha levels above .6 are considered to indicate good internal reliability.

Country	General Population Alpha Reliability
Global Average	0.77
Argentina	0.77
Australia	0.79
Brazil	0.67
Canada	0.79
China	0.76
Colombia	0.66
France	0.81
Germany	0.83
Hong Kong	0.72
India	0.76
Indonesia	0.79
Ireland	0.78
Italy	0.79

Country	General Population Alpha Reliability
Japan	0.76
Malaysia	0.75
Mexico	0.68
Netherlands	0.82
Poland	0.74
Russia	0.80
Singapore	0.77
South Africa	0.71
South Korea	0.75
Spain	0.81
Sweden	0.79
Turkey	0.80
UAE	0.77
U.K.	0.79
U.S.	0.73

Societal Fears Subscales in Detail

In the 2017 Edelman Trust Barometer study we measured five societal fears as defined below.

Respondents rated how true each statement is using a nine-point scale where one means it is “not at all true” and nine mean it is “completely true.”

Corruption Items	Globalization Items	Eroding Social Values Items	Immigration Item	Pace Of Innovation Item
Widespread corruption: Compromising the safety of our citizens (*Q686)* Makes it difficult to institute the changes necessary to solve our problems (*Q687)*	Protect our jobs from foreign competition (*Q681)* Foreign companies/influence damaging our economy/ national culture (*Q682)* Foreign corporations favor their home country (*Q683)* Most countries cannot be trusted to engage in fair trade practices (*Q684)*	Values that made this country great disappearing (*Q676)* Society changing too quickly and not in ways that benefit people like me (*Q758)*	Influx of people from other countries damaging our economy and national culture (*Q685)*	Technological innovations happening too quickly and leading to changes that not good for people like me (*Q677)*
Scale Scoring: Concerned = % who gave Top-four box response to both items. Fearful = % who gave Top-two box response to both items.	Scale Scoring: Concerned = % who gave Top-four box response to 3+ items. Fearful = % who gave Top-two box response to 3+ items.	Scale Scoring: Concerned = % who gave Top-four box response to both items. Fearful = % who gave Top-two box response to both items	Scale Scoring: Concerned = % who gave Top-four box response to item. Fearful = % who gave Top-two box response to item.	Scale Scoring: Concerned = % who gave Top-four box response to item. Fearful = % who gave Top-two box response to item.

The Research Team: Edelman Intelligence

Edelman Intelligence is a world class research and analytics consultancy. It works to understand the mechanics of human attitudes and behavior, organize and analyze content and conversations, and uncover connections and patterns in complex data sets. The team is made up of experts from different backgrounds with different skillsets.

This allows Edelman Intelligence to approach challenges in a unique way – taking different perspectives to find the best solutions to help drive growth for its clients.

Antoine Harary

Antoine is the global MD of Edelman Intelligence. With his team of over 150 intelligence experts, he manages international research and consulting projects across more than 50 countries.

Over the last four years his work has been recognized by two major awards from the Communications Industry: the 2011 EMEA Sabre Award for best public affairs campaign and the 2012 European Excellence award for PR measurement.

Before joining Edelman, Antoine worked in the automotive industry (PSA PEUGEOT CITROEN) as a senior research manager. Antoine holds two Masters Degrees: International PR from CELSA/Sorbonne and Political Sciences from Sciences Po Aix.

David M. Bersoff, Ph.D.

David is in charge of Edelman's global thought leadership research.

Before joining Edelman Intelligence, Dr. Bersoff served as The Futures Company's Chief Insights Officer. In that role, he drove the research, data analysis, IP creation and product development strategy for all of their syndicated consumer insights offers, including the Yankelovich MONITOR.

David holds a Ph.D. in social and cross-cultural psychology from Yale University.

Sarah Adkins

Sarah leads the operations side of all IP projects at Edelman Intelligence.

Prior to joining the EI team, Sarah spent 8 years at Nielsen (formerly Harris Interactive), designing surveys, overseeing all parts of the project management process, conducting data analysis and working closely with clients from all industries.

She has 16+ years of experience in market research, with more than half of that spent in the brand and communications industry.

Sarah graduated from Fredonia State University with a bachelors degree in business administration, specializing in marketing and communications.

The Social Policy Team

Edelman's Public Affairs practice uses stakeholder opinion insights, deep issue analysis, creative storytelling and digital campaigning to create a positive environment for public engagement and help shape better policy outcomes. The team has a deep and sophisticated understanding of global politics. Several Edelman Public Affairs experts provided expertise and served as advisors on the development of our model of Populist Action.

Steve Schmidt

As Vice-Chairman of Public Affairs at Edelman, Steve is a strategic counselor to chief executive officers and senior decision makers at global corporations, professional sports franchises, non-profit organizations and academic institutions. Previously, he served as a top strategist to President George W. Bush's 2004 re-election and as Deputy Assistant to the President and Counselor to the Vice President. During his tenure with the Administration, Steve played a leading role in the confirmations of Chief Justice John Roberts and Justice Samuel Alito to the United States Supreme Court. In 2006, Steve left the White House to lead the successful re-election of California Governor Arnold Schwarzenegger and subsequently served as a senior advisor to Senator John McCain's presidential campaign.

Steve is a graduate of the University of Delaware and a Senior Fellow at the school's Center for Political Communication.

Stephanie Lvovich

Stephanie Lvovich is the global chair of public affairs at Edelman. She has more than 23 years of public affairs and political research experience and specializes in multi-market issue advocacy and corporate positioning including issue-based communications, issue advocacy, and trade association creation, strategy and management. Her client experience focuses on the FMCG businesses and includes Mars, the World Trade Organisation, Unilever, the Coca-Cola Company, Mead Johnson Nutrition, Danone Group, Danone Baby Nutrition, and others.

Prior to joining Edelman, Stephanie worked for APCO Worldwide in London for nearly nine years where she built and managed APCO Worldwide's global Food & Consumer Products practice internationally as well as the firm's new business function for Europe, Middle East, Africa and India.

Stephanie has authored articles in the field of international public affairs and corporate reputation and was honoured by HRH Queen Elizabeth in 2003 as a Pioneer to the Life of the Nation. She is also an active presenter and moderator at international conferences.

Gustavo Bonifaz

Gustavo is a Senior Account Manager in Edelman's Public Affairs practice, specialising in comparative global politics and policy analysis. Gustavo is a researcher on the Edge global model for the practice of Public Affairs.

Prior to joining Edelman Gustavo earned a PhD in Political Science at the London School of Economics, where he also obtained a Msc. In Comparative Politics (Latin America).

Kristin Heume

Kristin is the global public affairs team's global development manager. She designs and delivers multi-market advocacy and engagement strategies, and advises clients on business-critical issues.

Prior to joining Edelman, Kristin worked at APCO Worldwide where she focused on issues and crisis counsel as well as managing multi-market campaigns in the aviation, food, tourism and international public sectors.

Kristin holds a double Master's degree in Global Media and Communications from the London School of Economics (MSc) and the University of Southern California (MA), as well as a Bachelor of Arts in European Studies and Economics from the University of Osnabrück, Germany, with a stint at Aarhus University, Denmark.