

2018 Edelman Trust Barometer

Methodology

Online Survey in 28 Markets

18 years of data

33,000+ respondents total

All fieldwork was conducted between October 28 and November 20, 2017

■ U.S. Hispanic Oversample

Sample = 400 Hispanics. 185 came from the main sample and 215 were collected as a separate oversample. Respondents were given the choice to complete the survey in Spanish or English

28-market 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+), half-sample global general online population +/- 0.8 (N=16,100).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N = min 200, varies by market, China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N =min 740, varies by market).

Hispanic data margin of error: +/-4.9% (N=400).

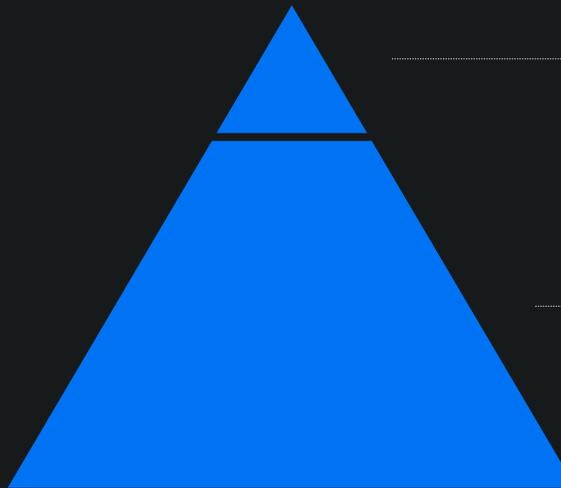
General Online Population

7 years in 25+ markets

Ages 18+

1,150 respondents per market

All slides show general online population data unless otherwise noted



Informed Public

10 years in 20+ markets

Represents 15% of total global population

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

Must meet 4 criteria:

Ages 25-64

College educated

In top 25% of household income per age group in each market

Report significant media consumption and engagement in business news

Mass Population

All population not including informed public

Represents 85% of total global population



Trust Crash in the U.S.

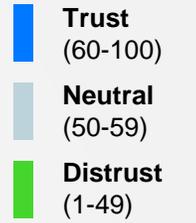
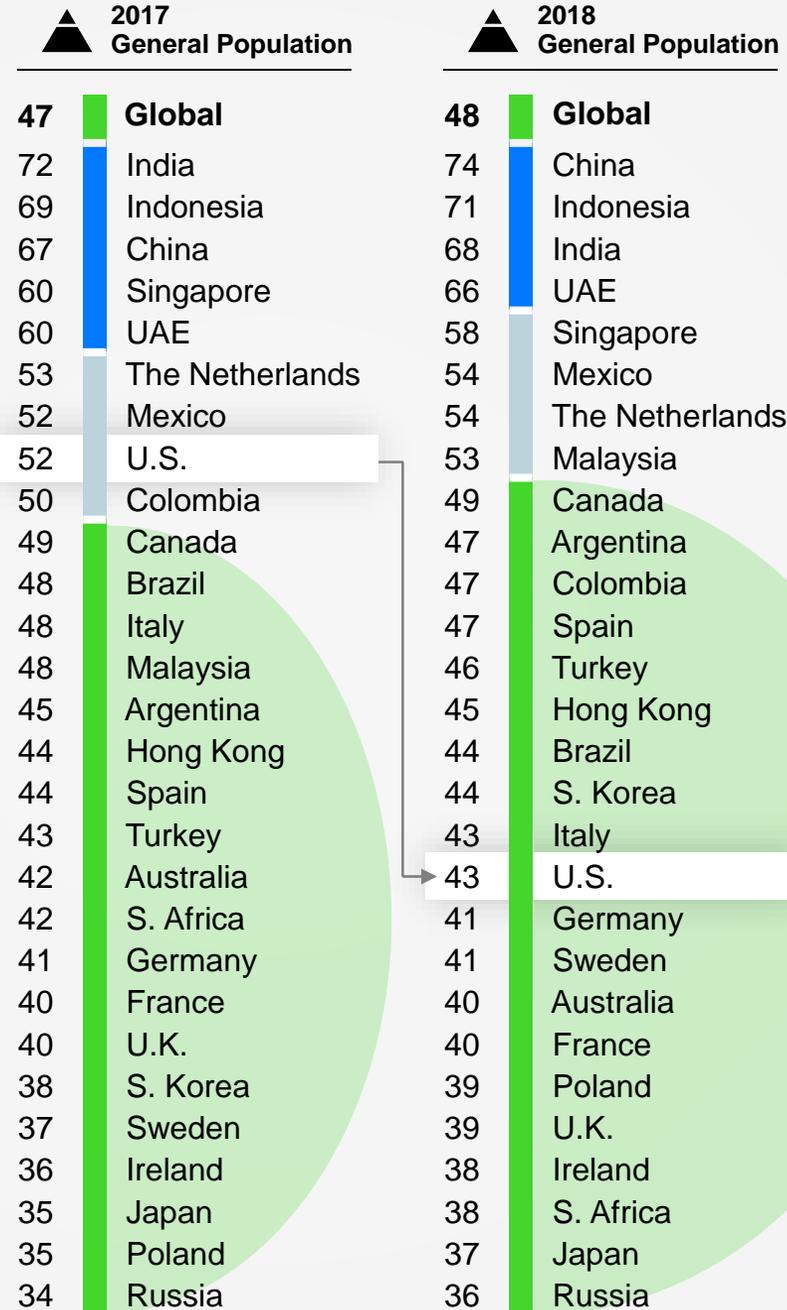
Trust Index U.S. Trust Plummets

Average trust in institutions,
general population, 2017 vs. 2018

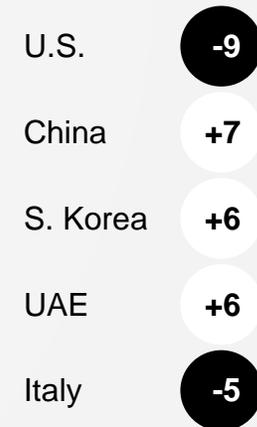
Global Trust Index remains at distruster level

20 of 28 markets are distrusters, up 1 from 2017

Source: 2018 Edelman Trust Barometer.
The Trust Index is an average of a market's trust in the institutions of government, business, media and NGOs. General population, 28-market global total.



Biggest changes in



Trust decline in the U.S. is
the steepest ever measured

Trust Index

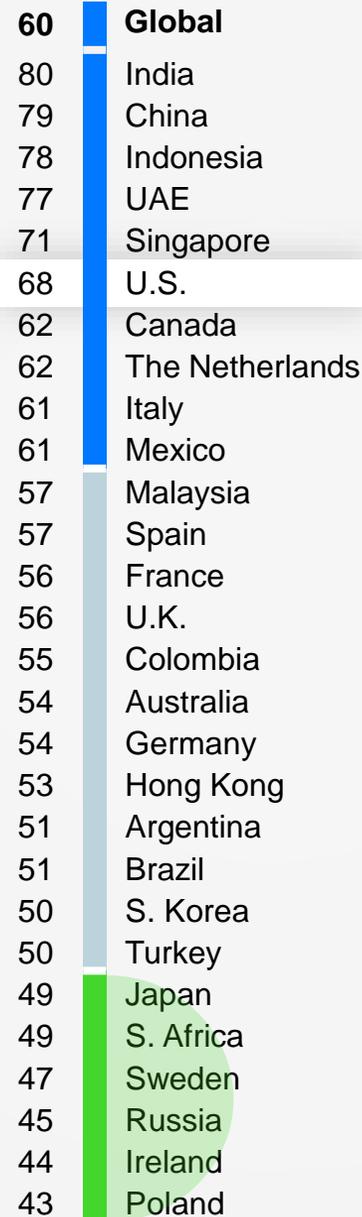
U.S. Informed Public Now Least Trusting Globally

Average trust in institutions, informed public, 2017 vs. 2018

A 1-point decline in the Global Trust Index

Source: 2018 Edelman Trust Barometer.
The Trust Index is an average of a market's trust in the institutions of government, business, media and NGOs. Informed public, 28-market global total.

▲ 2017 Informed Public

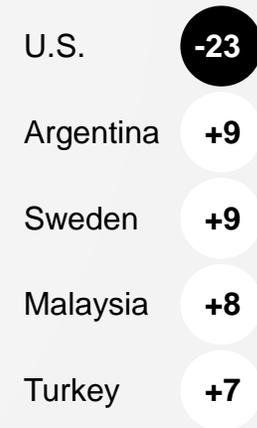


▲ 2018 Informed Public



Trust (60-100)
Neutral (50-59)
Distrust (1-49)

Biggest changes in

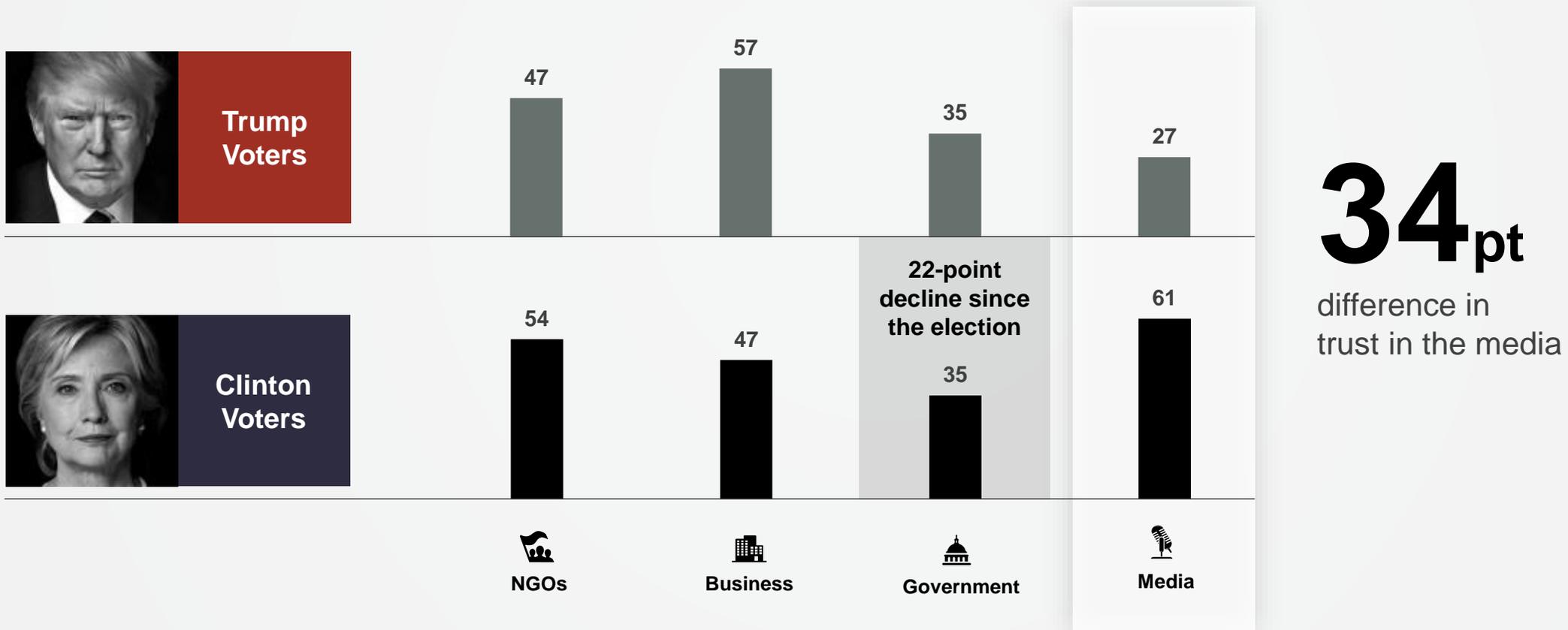


U.S. Trust Index crashes 23 points



U.S. Trust Diverges Along Voting Lines

Percent trust in each institution, Trump vs. Clinton voters



Source: 2018 Edelman Trust Barometer. TRU_INS. 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) S11. For whom did you vote for in the last Presidential election? General population, U.S., among Trump (n=373) and Clinton (n=502) voters.



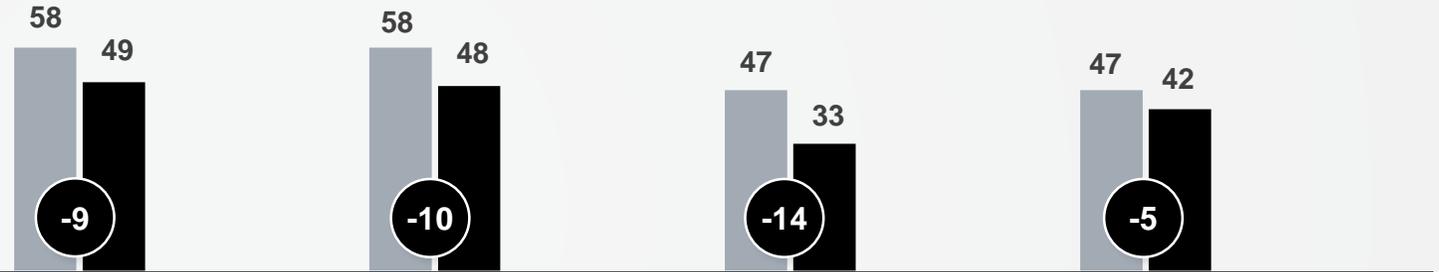
Trust Crash Even More Extreme Among Hispanics

Percent trust in each institution, and change from 2017 to 2018



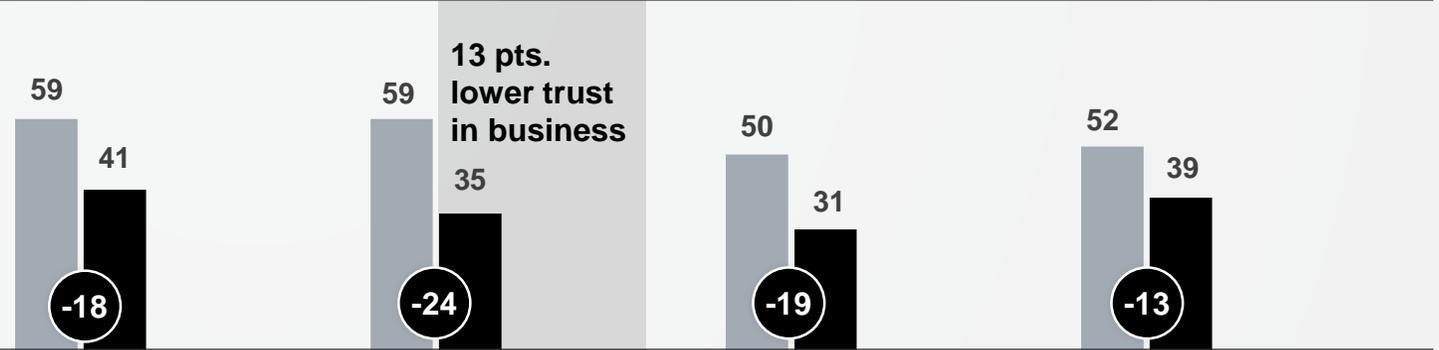
43
TRUST INDEX

▲ U.S. General Population
9-point decrease



37
TRUST INDEX

■ U.S. Hispanics
18-point decrease



NGOs Business Government Media

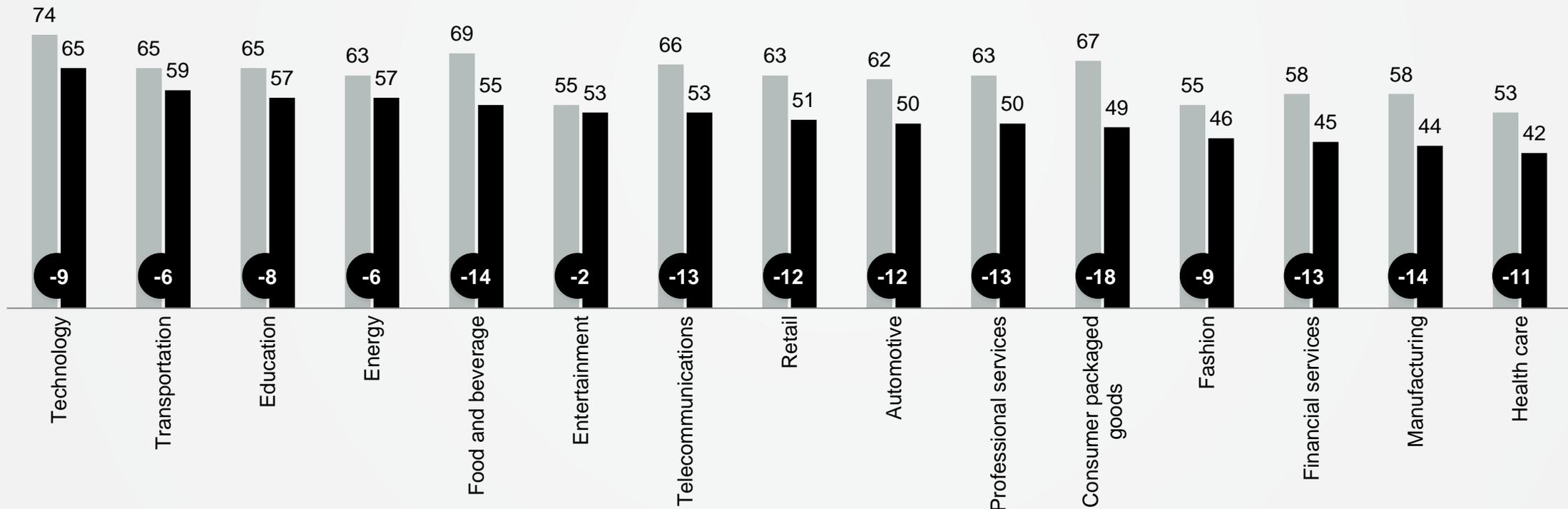
Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) The Trust Index is an average of a market’s trust in the institutions of government, business, media and NGOs. Hispanics and general population, U.S.

Hispanics Less Trusting Across Sectors

Percent of who trust each sector, ranked by gap between U.S. Hispanics and U.S. general population

■ U.S. general population ■ U.S. Hispanics

○ Trust gap



Source: 2018 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 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), industries shown to half of the sample. Hispanics and general population, U.S.



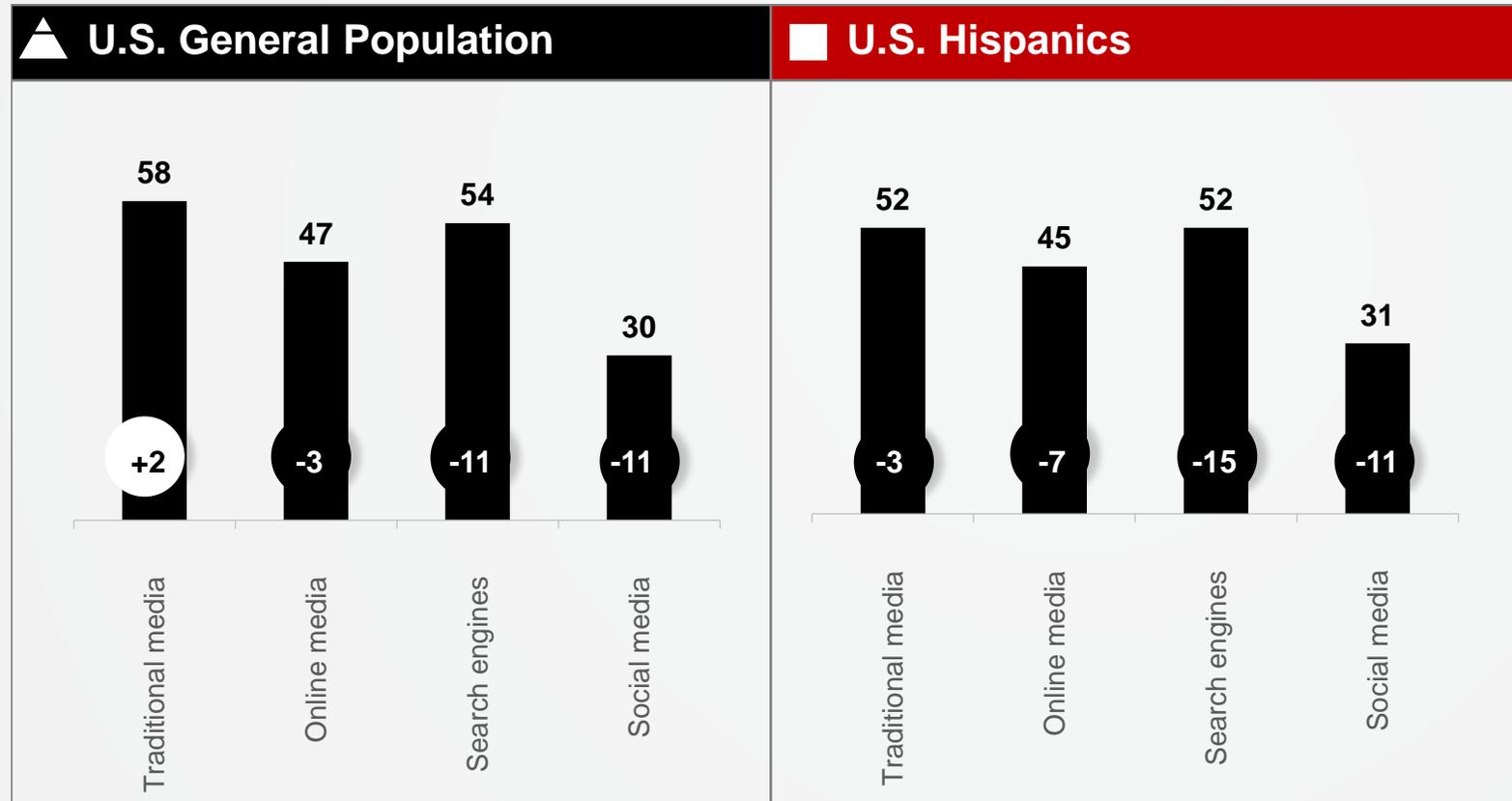


In Search of Truth

U.S. Hispanics Lose Trust in News Sources

Percent trust in each source for general news and information, and change from 2017 to 2018, general population vs Hispanics, in the U.S.


 Y-to-Y Change



Greatest trust declines in search and social media platforms; traditional media declines the least

Source: 2018 Edelman Trust Barometer. COM_MCL. 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), question asked of half of the sample. Hispanics and general population, U.S.

Traditional Media is defined as “Mainstream media sources that are available in a print or broadcast format, such as newspapers, magazines, television news and radio news. Social media is defined as “Includes social networking sites (such as Facebook, LinkedIn, Snapchat, Instagram, Ozone, RenRen), online discussion forums, content-sharing sites (such as YouTube) and microblogging sites (such as Twitter or Sina Weibo)”



More Than Half Disengaged With the News

Consumption

How frequently do you consume news produced by major news organizations, either at the original source, shared by others or pushed to you in a feed?

Amplification

How often do you share or forward news items, or post opinions or other content?

Source: 2018 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Hispanics and general population, U.S.
For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

■ U.S. Hispanics

59%

The Disengaged

Consume news less than weekly

21%

Consumers

Consume news about weekly or more

20%

Amplifiers

Consume news about weekly or more AND share or post content several times a month or more

▲ U.S. General Population

55%

The Disengaged

26%

Consumers

20%

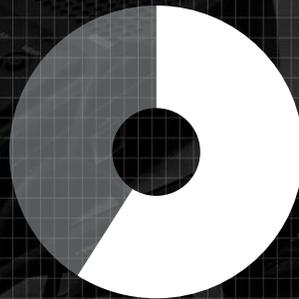
Amplifiers



U.S. Hispanics Skeptical About News Organizations

Percent of U.S. Hispanics who agree that news organizations are overly focused on ...

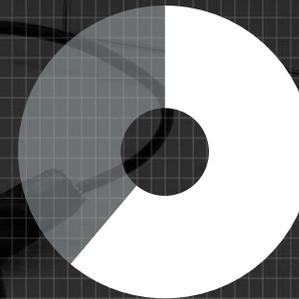
Attracting Large Audiences



59%

are more concerned with attracting a big audience than reporting

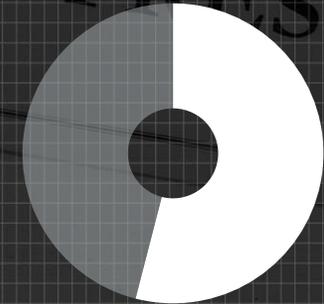
Breaking News



55%

sacrifice accuracy to be the first to break a story

Politics



54%

support an ideology vs. informing the public

Source: 2018 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree), question asked of half of the sample. Hispanics and general population, U.S.





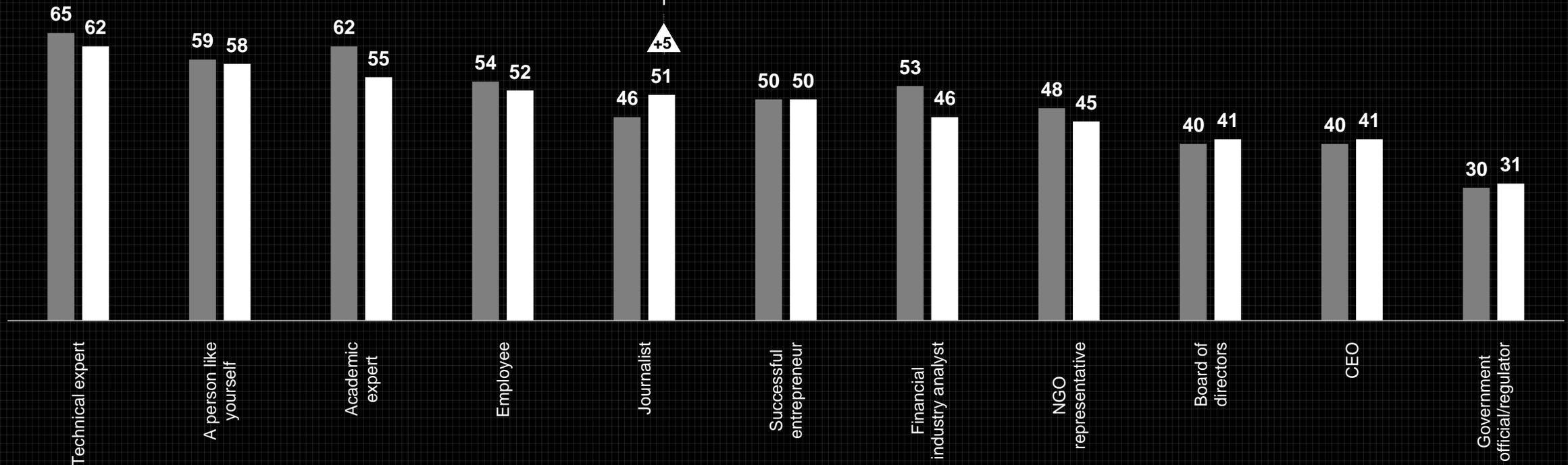
Regaining Trust Among U.S. Hispanics

Journalists More Credible Among U.S. Hispanics

■ U.S. general population ■ U.S. Hispanics

Percent who rate each spokesperson as very/extremely credible

Journalists are five points more credible and rank fifth among U.S. Hispanics, vs. eighth among the U.S. general population



Source: 2018 Edelman Trust Barometer. CRE_PPL. 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), question asked of half of the sample. Hispanics and general population, U.S.



Business Is Expected to Lead

Percent of U.S. Hispanics who agree, and who say each is one of the most important expectations they have for a CEO

Percent who say that CEOs should take the lead on change rather than waiting for government to impose it

64%

For CEOs, building trust is a top priority

High quality products and services 66

Decisions reflect values of company 63

Ensure company is trusted 62

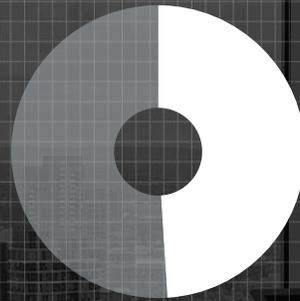
High ethical standards 59

Source: 2018 Edelman Trust Barometer. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? (Most important responsibility, code 3), question asked of half of the sample. Hispanics and general population, U.S.



Business Must Show Commitment to Long-Term

Percent who agree that ...



49%

Companies that only think about themselves and their profits are bound to fail



58%

CEOs are driven more by greed than a desire to make a positive difference in the world

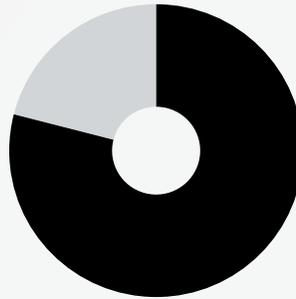
Source: 2018 Edelman Trust Barometer. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. (Top 4 Box, Agree), question asked of half of the sample. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. Hispanics and general population, U.S.



Employers Must Build Trust Among U.S. Hispanics

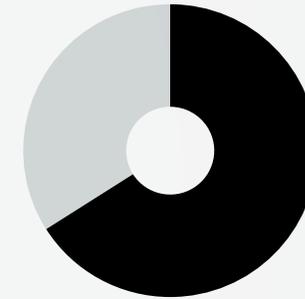
Percent who trust their employer

Among U.S. General Population



79%

Among U.S. Hispanics



66%

Employer trust among U.S. Hispanics is **13 points lower**

Source: 2018 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] 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) Hispanics and general population, U.S.

Earning Trust Among U.S. Hispanics

Business must

- 1 Leverage credibility of experts and peers
 - 2 Take the lead on positive change
 - 3 Increase CEO visibility on issues
 - 4 Commit to the long term
 - 5 Build trust among employees
 - 6 Give employees a voice
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