2017 Edelman Trust Barometer

Presentation to EuroPCom

November 2017

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Edelman

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**

2017 Edelman Trust Barometer Methodology

Online Survey in
28 Countries

- General Online Population
- Informed Public — Represents 13% of total global population
- Mass Population — Represents 87% of total global population

Trusters	**60 – 100%**
Neutrals	**50 – 60%**
Distrusters	**0 – 50%**

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).

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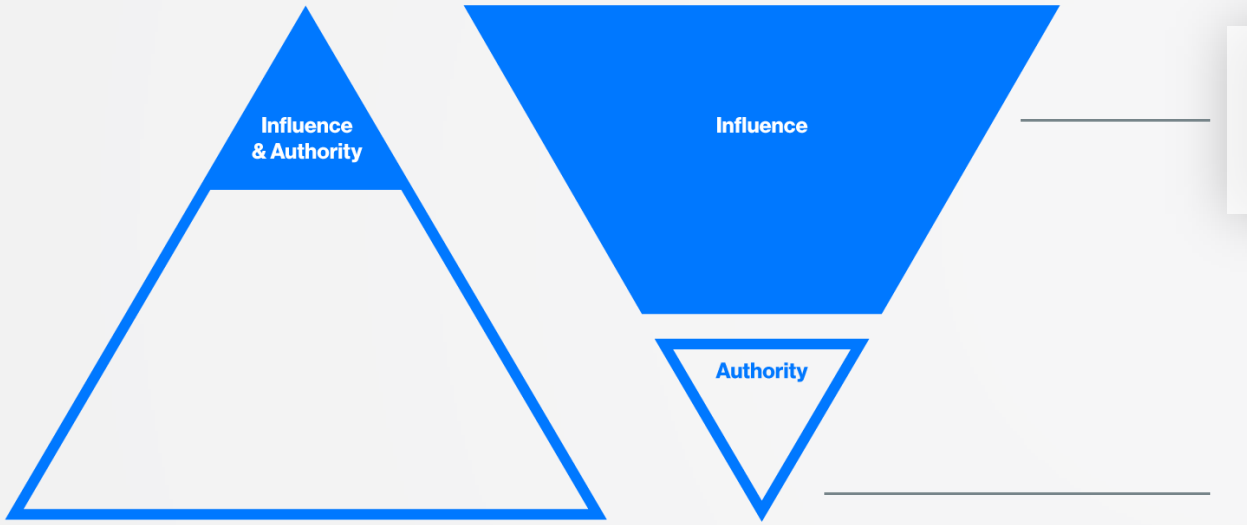
Trust in Crisis

2016: The Inversion of Influence



Mass Population	**87%** of population	**41** Trust Index
Informed Public	**13%** of population	**52** Trust Index

11pt Gap

Largest Gaps

21 pts

19 pts

18 pts

Source: 2016 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, European Union.

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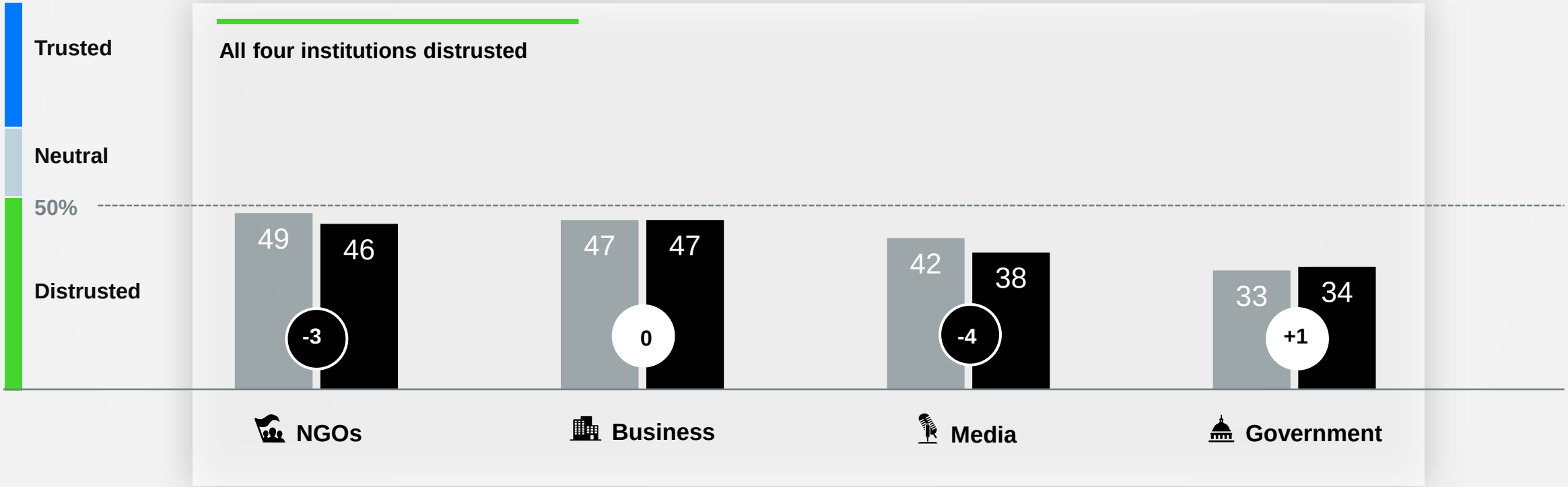
Trust in Media and NGO's Decline

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, European Union.

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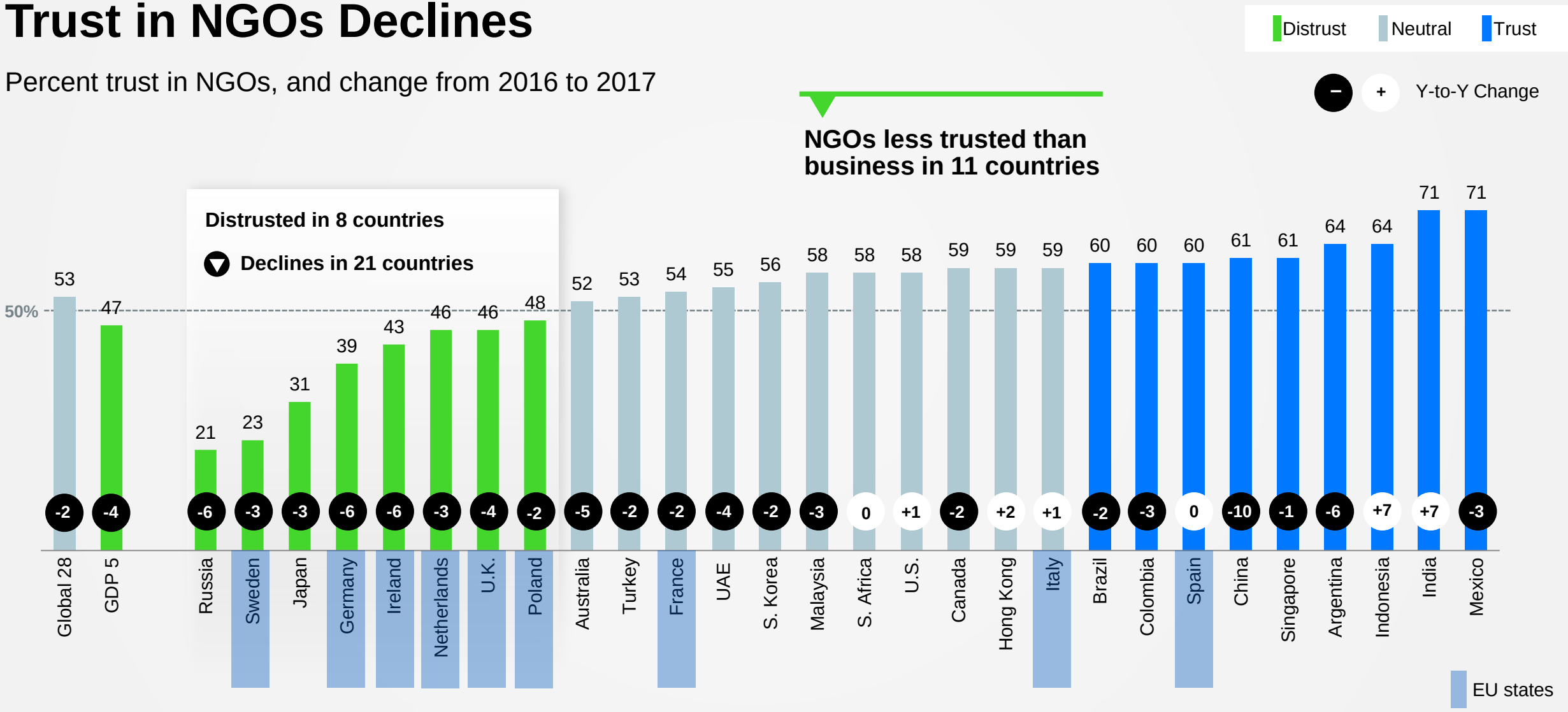
Trust in NGOs Declines

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.

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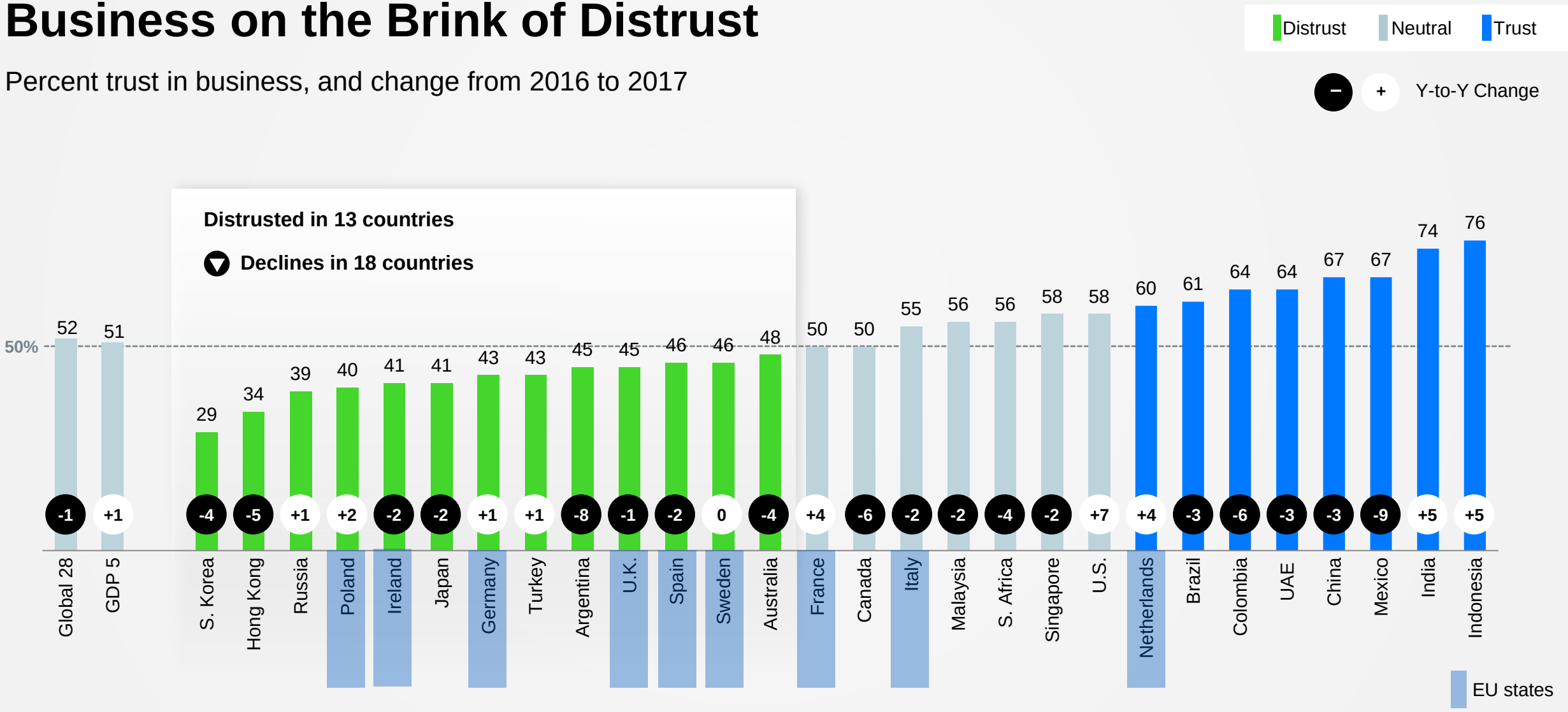
Business on the Brink of Distrust

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.

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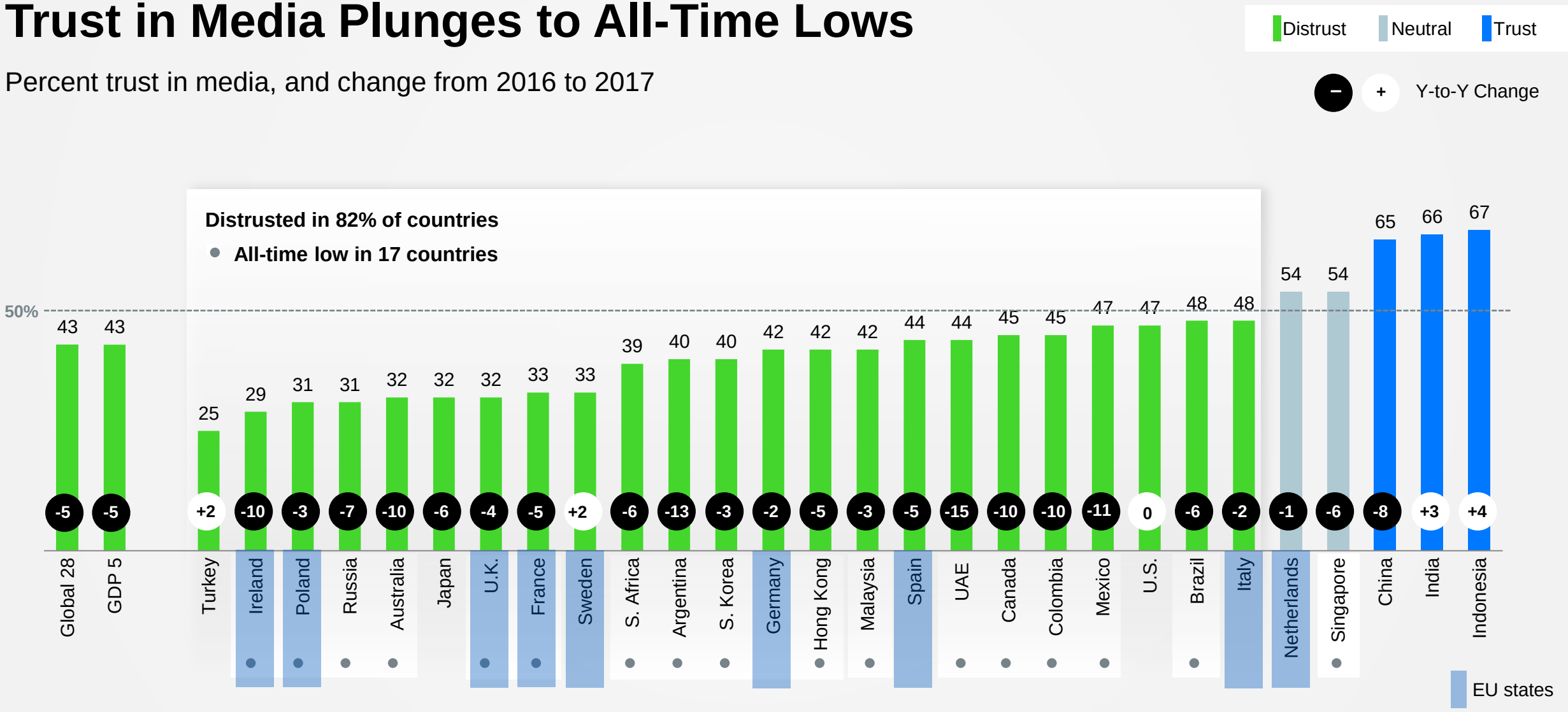
Trust in Media Plunges to All-Time Lows

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.

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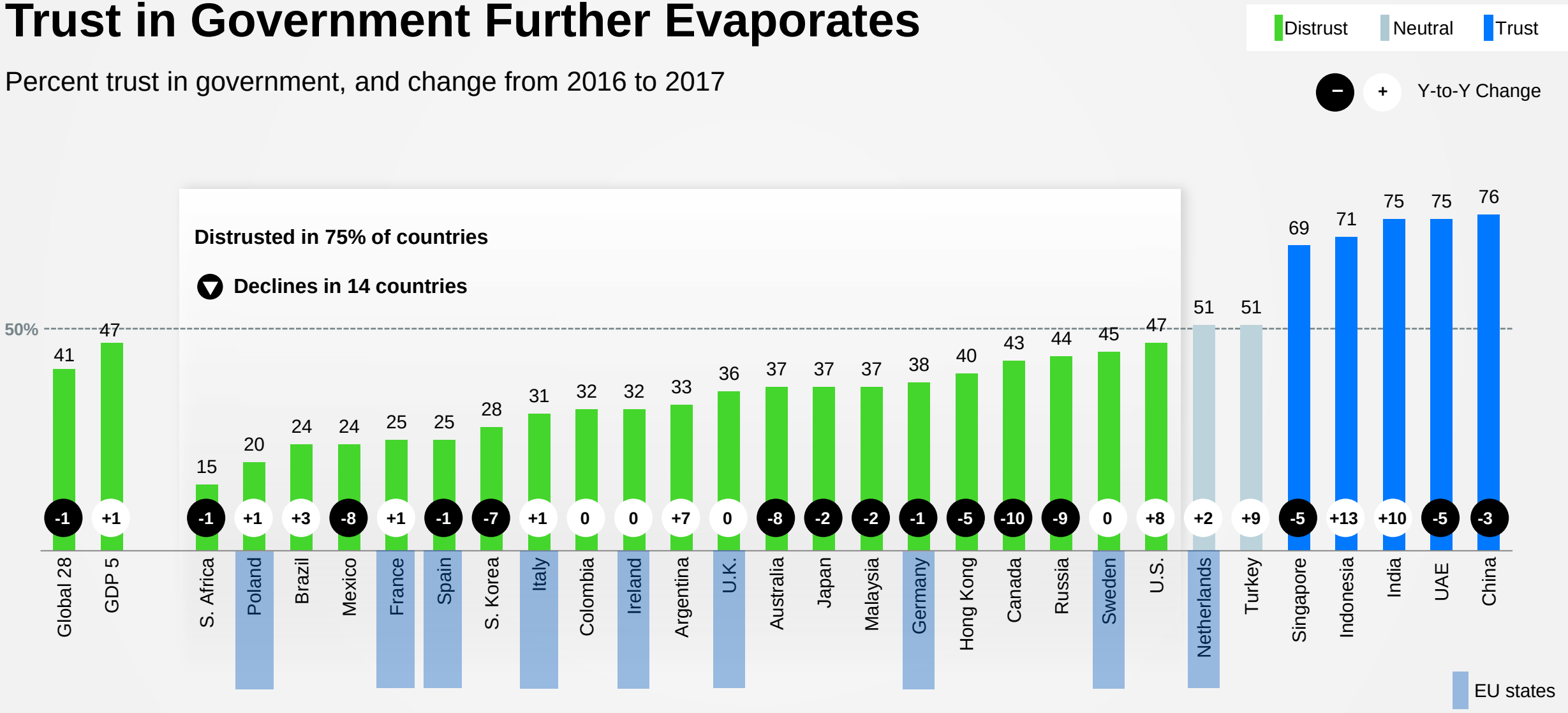
Trust in Government Further Evaporates

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.

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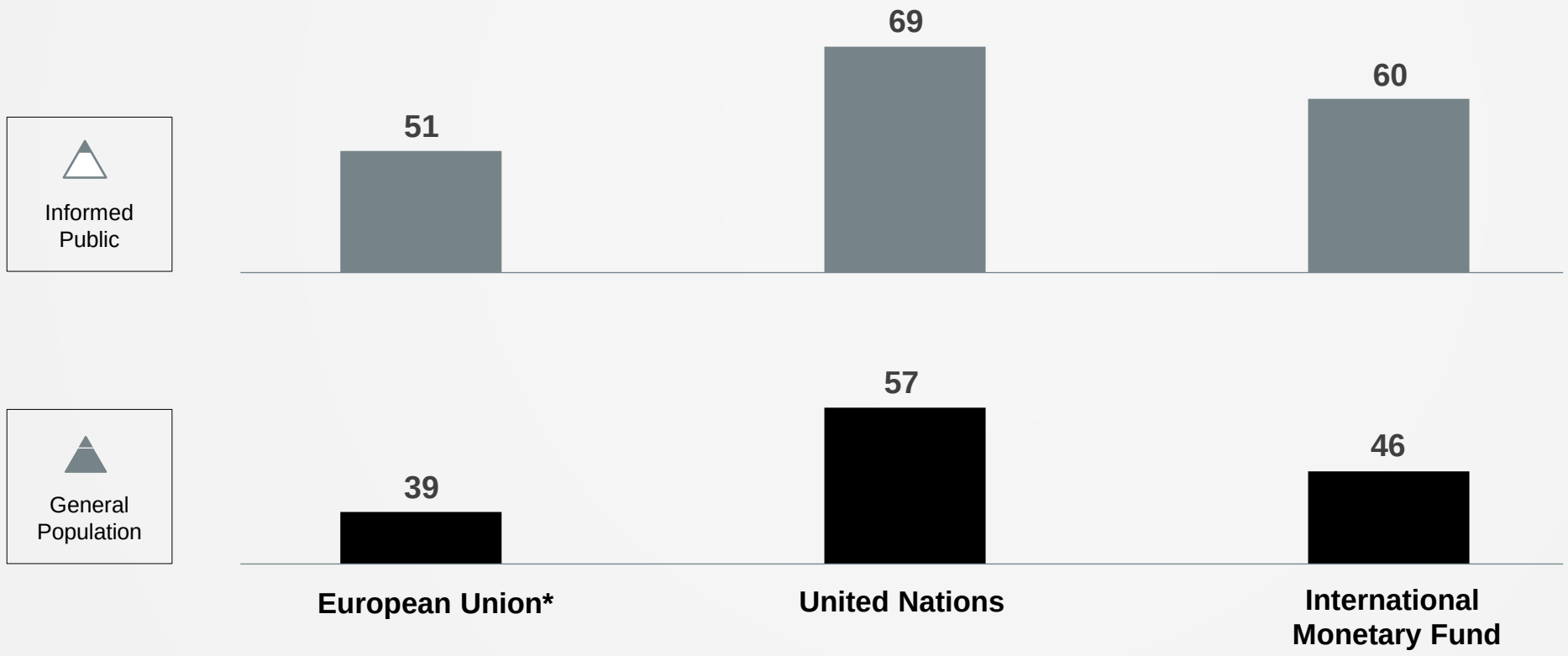
What about global institutions?

United Nations Most Trusted Multinational Institution

Percent trust in the three new institutions of the
European Union, United Nations and International Monetary Fund



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*The European Union is only asked of 11 European Countries.

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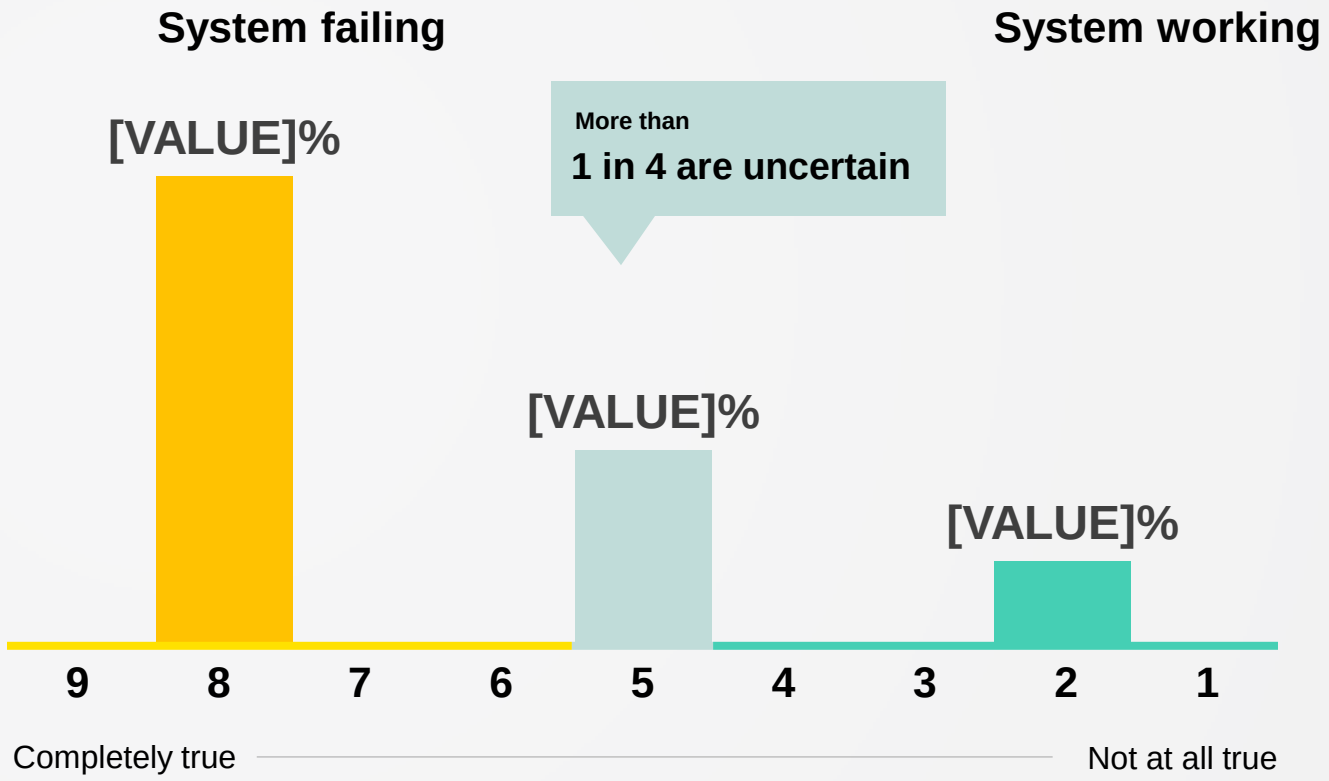
Is the system broken?

Majority Believe the System is Failing Them

EU

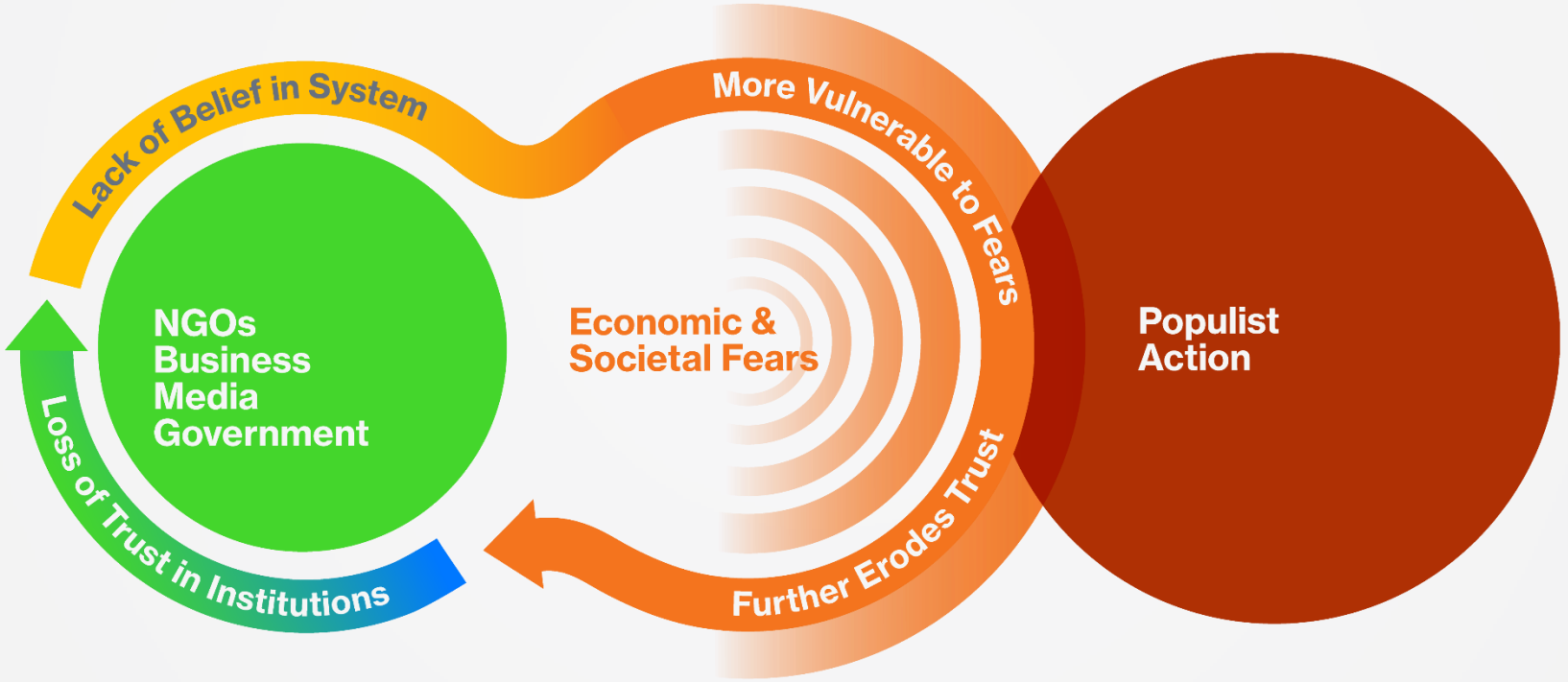
How true is this for you?

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



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

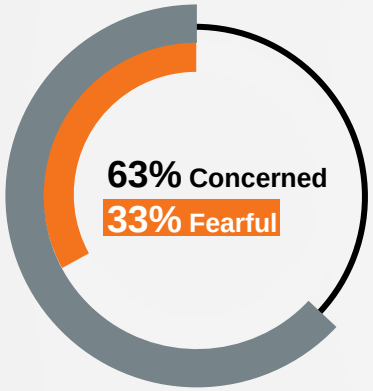
The Cycle of Fear and Distrust



Concerns Have Become Fears

Percent of respondents who are concerned or fearful regarding each issue

Corruption

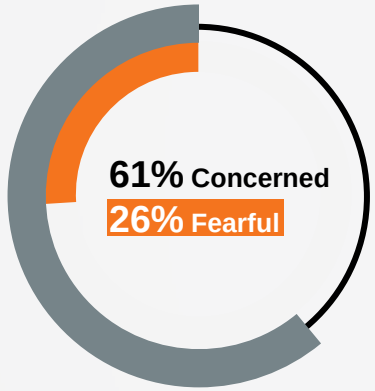


Widespread corruption

Compromising the safety of our citizens

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

Globalization



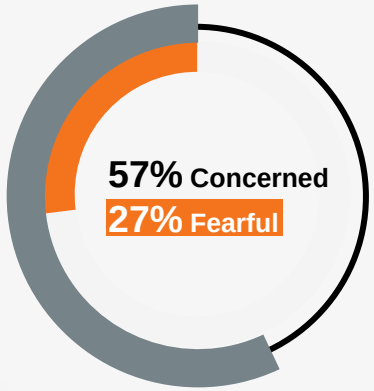
Protect our jobs from foreign competition

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

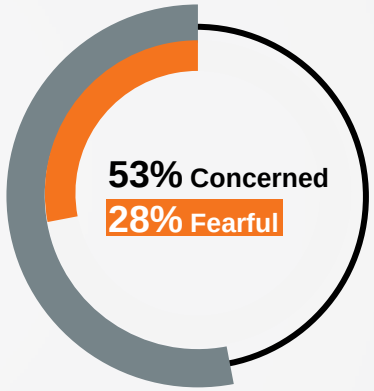
Eroding Social Values



Values that made this country great are disappearing

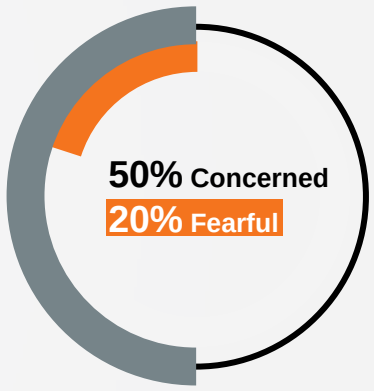
Society changing too quickly and not in ways that benefit people like me

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. European Union. For details on how the societal fears were measured, please refer to the Technical Appendix.

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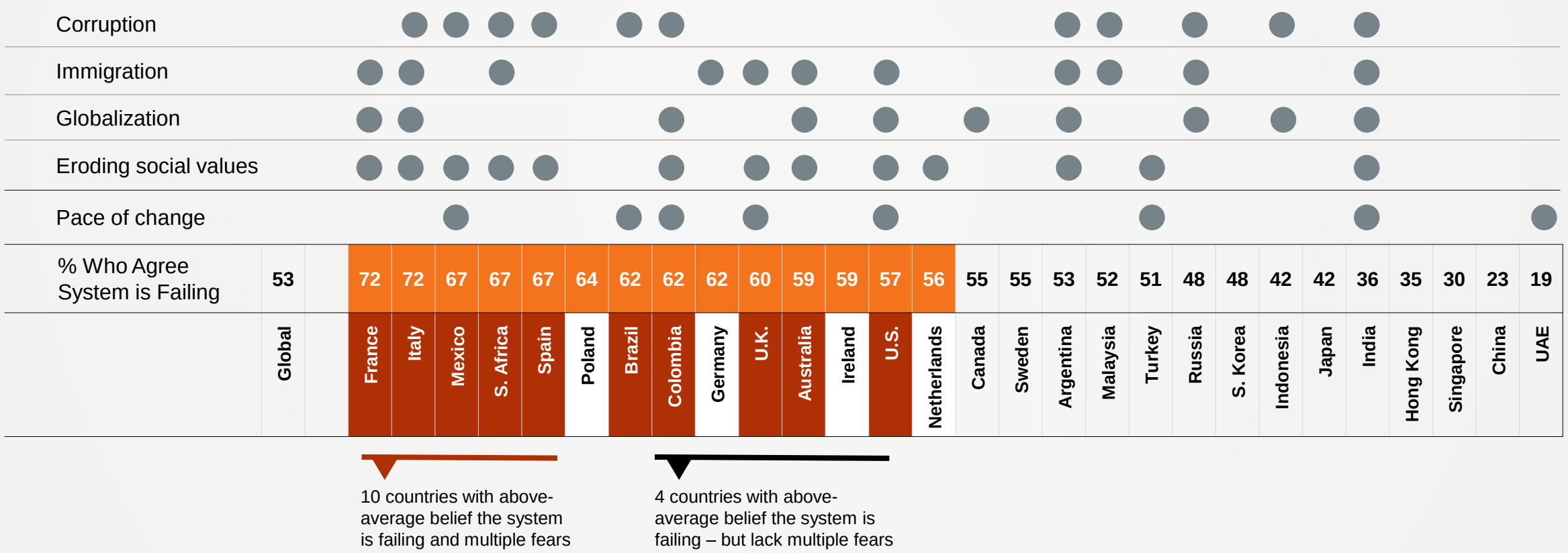
Systemic Distrust and Fear Trigger Action



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.

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How is information flow compounding the problem?

The Echo Chamber in Action

Facts matter less

More than
2 in 5 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

52%

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

3.5x more likely

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

No humans needed

More likely to believe

54% Search Engines

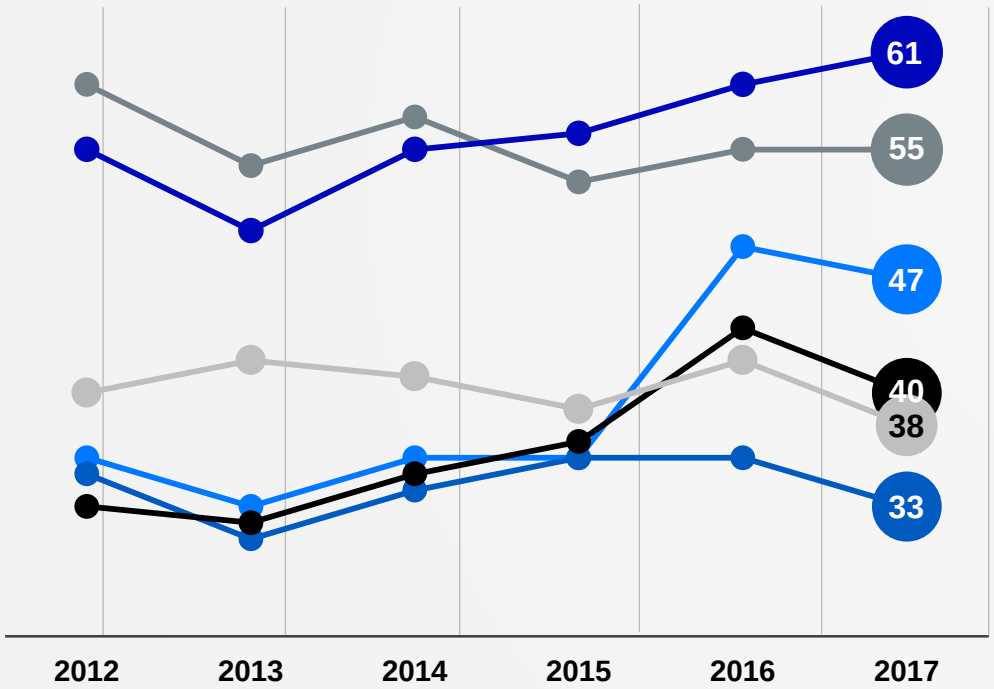
46% Human Editors

49% 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, European Union. 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, European Union, question asked of half the sample.

Online-Only Media Shows Largest Increase

Percent trust in each source for general news and information



	2012	2017	Change, 2012 - 2017
Search engines*	55	61	+6
Traditional media	59	55	-4
Online-only media**	36	47	+11
Owned media	33	40	+7
Social media	35	33	-2
Media as an institution	**40**	**38**	**-2**

Online media up 11 points

Owned media now more trusted than 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, European Union, 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."

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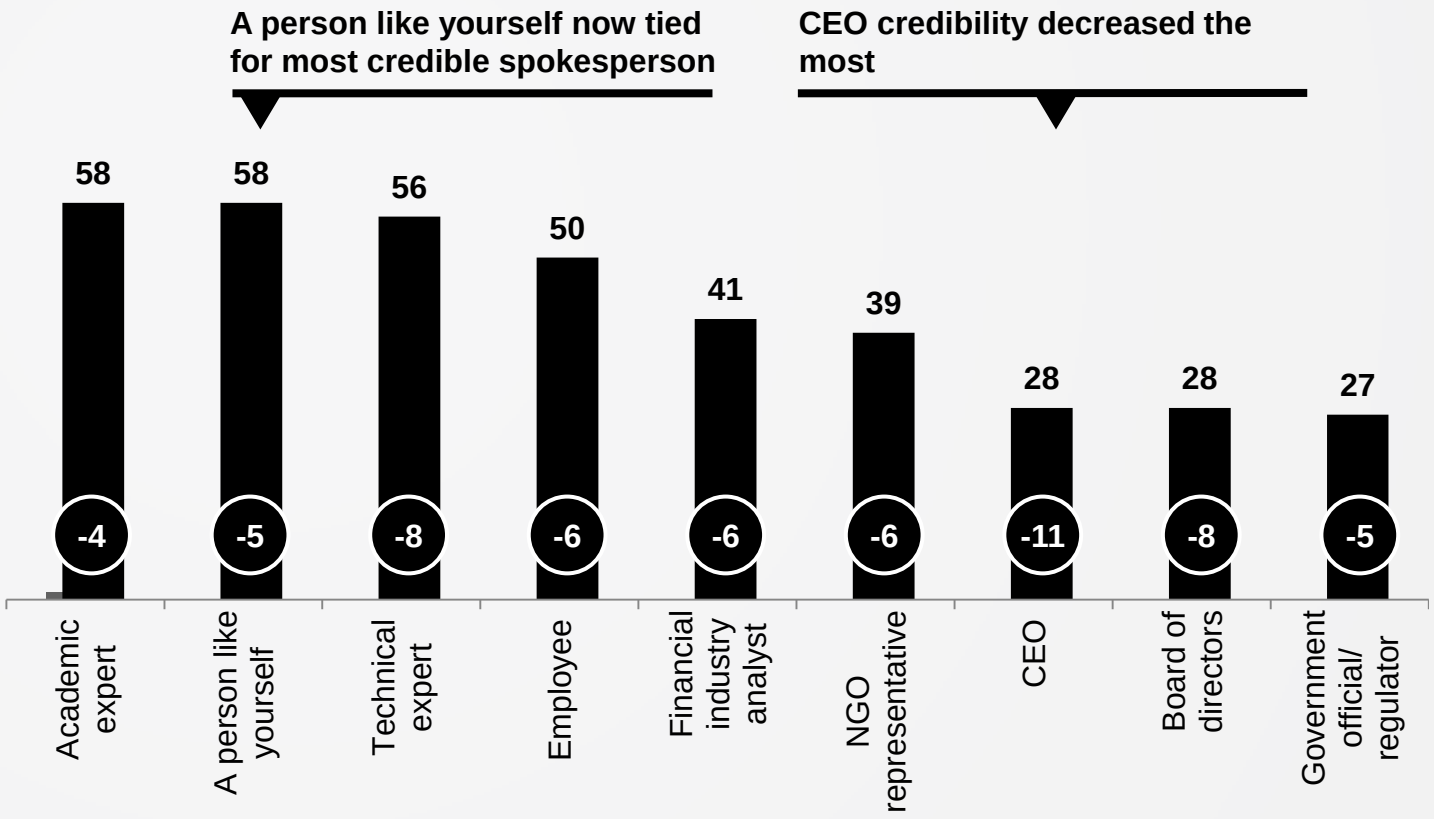
How do we rebuild trust?

1. Be both technocrats and populists

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, European Union, question asked of half the sample.

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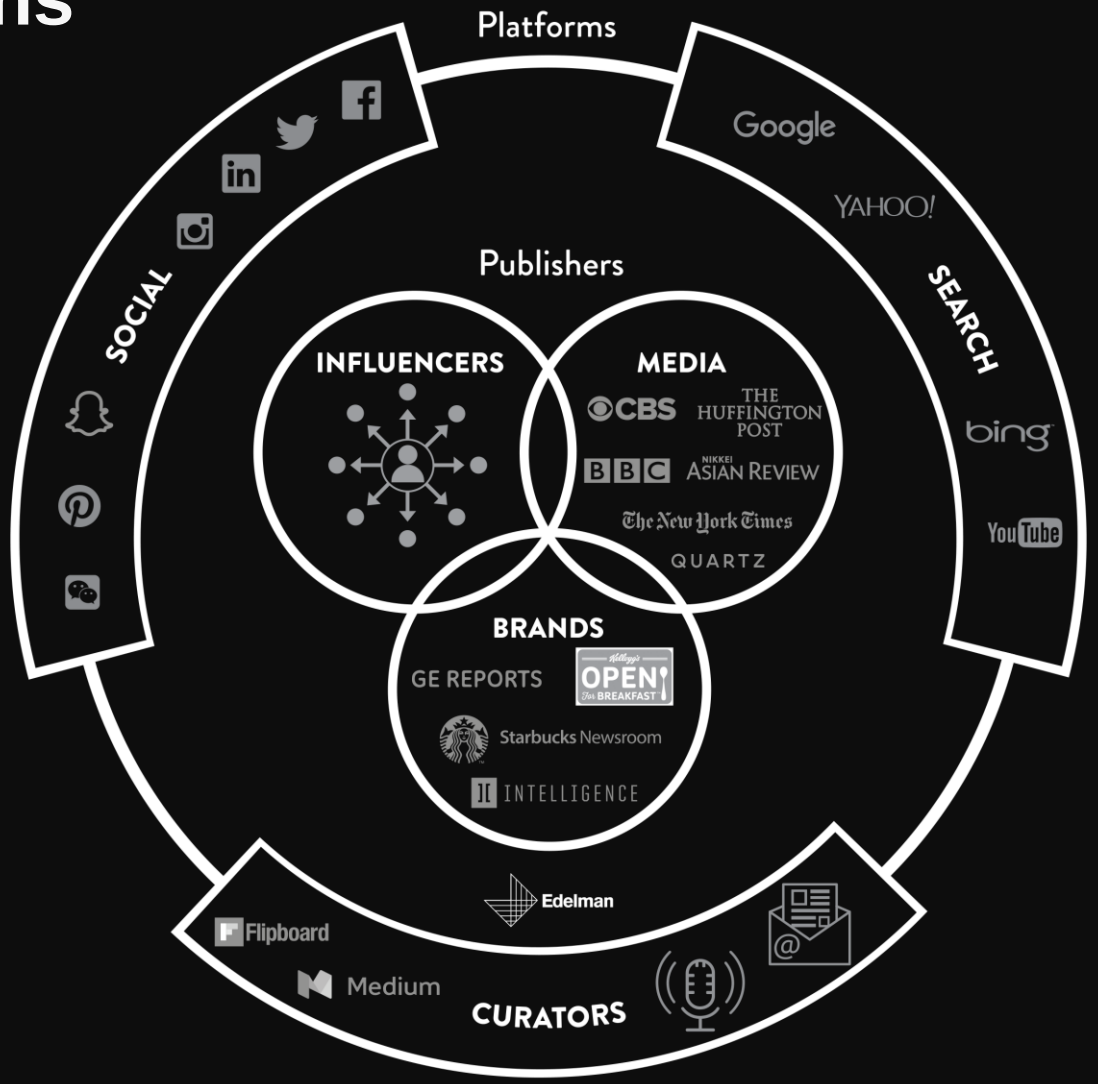
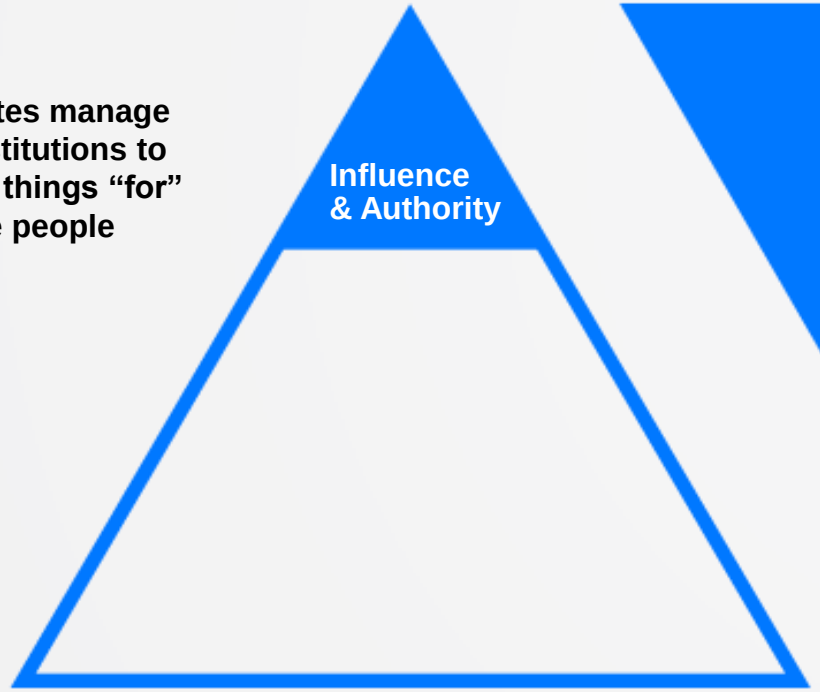
2. Understand how our world is changing and what that means for communications



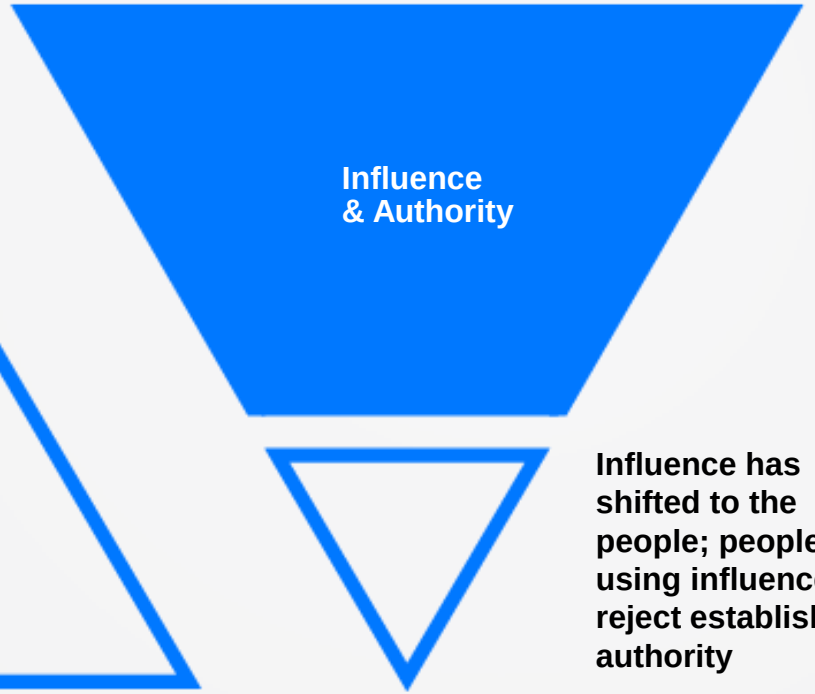
3. Deliver all communications through a simple test

Old Model: *For* the People

Elites manage institutions to do things "for" the people

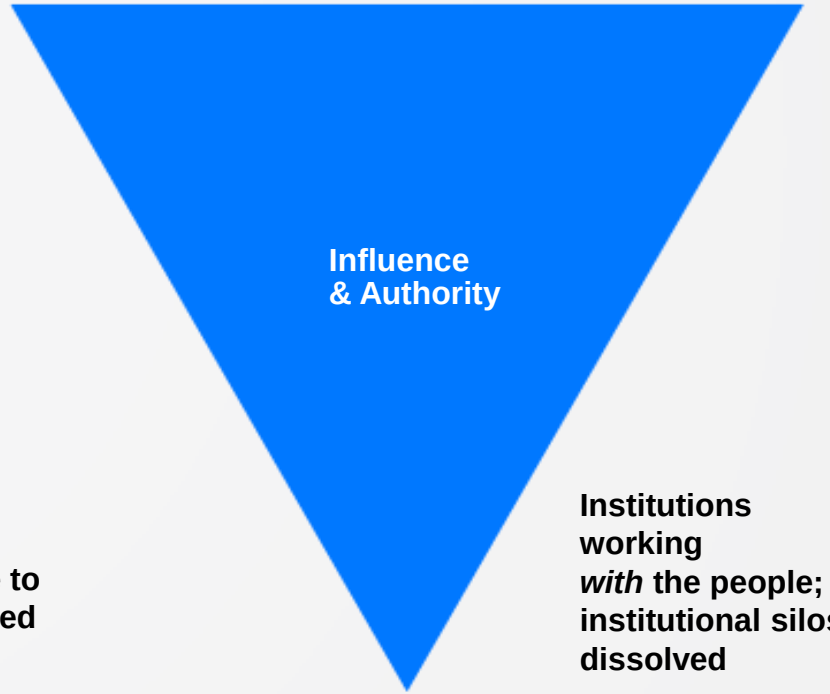


Current Tension



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

Thank You

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