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#TrustBarometer

2018 Edelman Trust Barometer

Methodology

Online Survey in 28 Countries

18 years of data

33,000+ respondents total

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

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

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).

General Online Population

7 years in 25+ countries

Ages 18+

1,150 respondents per country

All slides show general online
population data unless otherwise noted

Informed Public

10 years in 20+ countries

Represents 15% 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

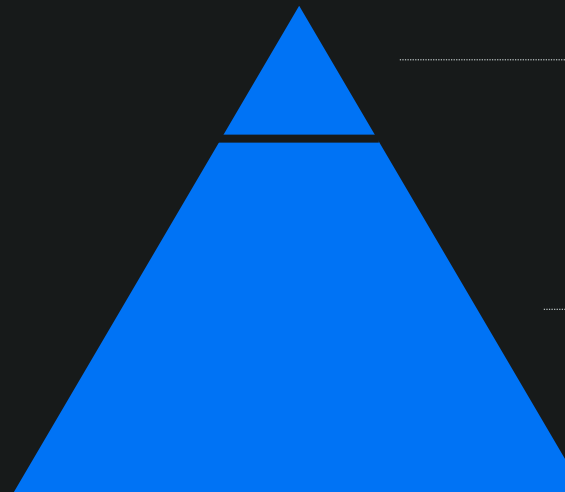
In top 25% of household income per
age group in each country

Report significant media consumption
and engagement in business news

Mass Population

All population not including informed public

Represents 85% of total global population



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

2018

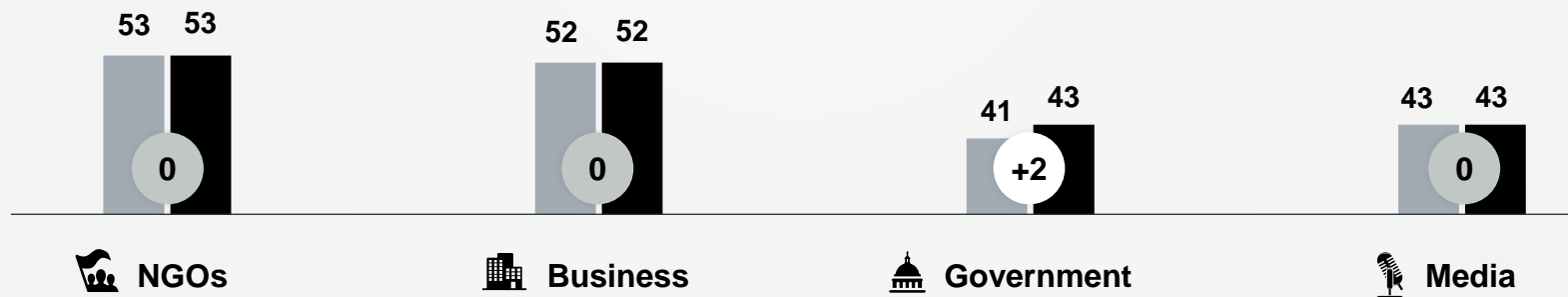
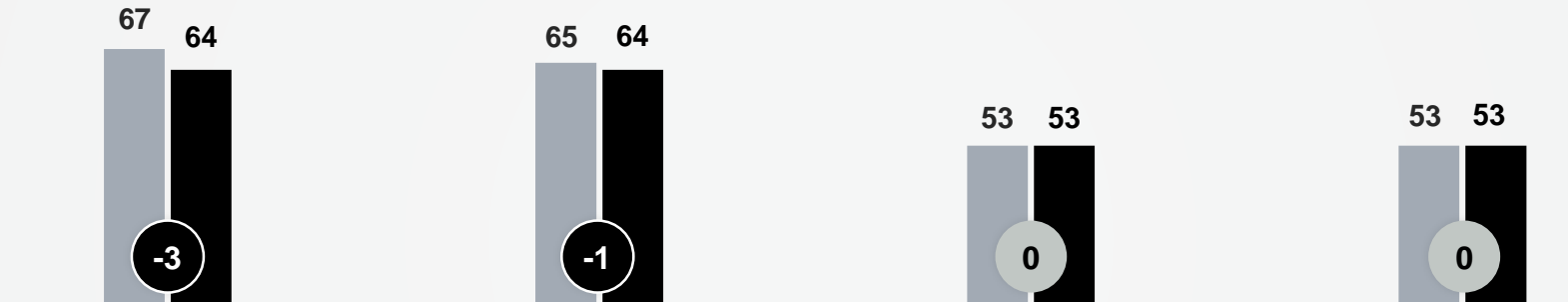
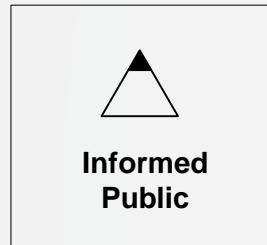
The Battle for Truth



A Polarization of Trust

No Recovery in Trust Globally

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



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) Informed Public and General Population, 28-country global total.

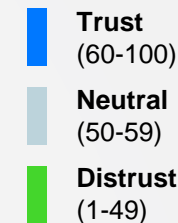
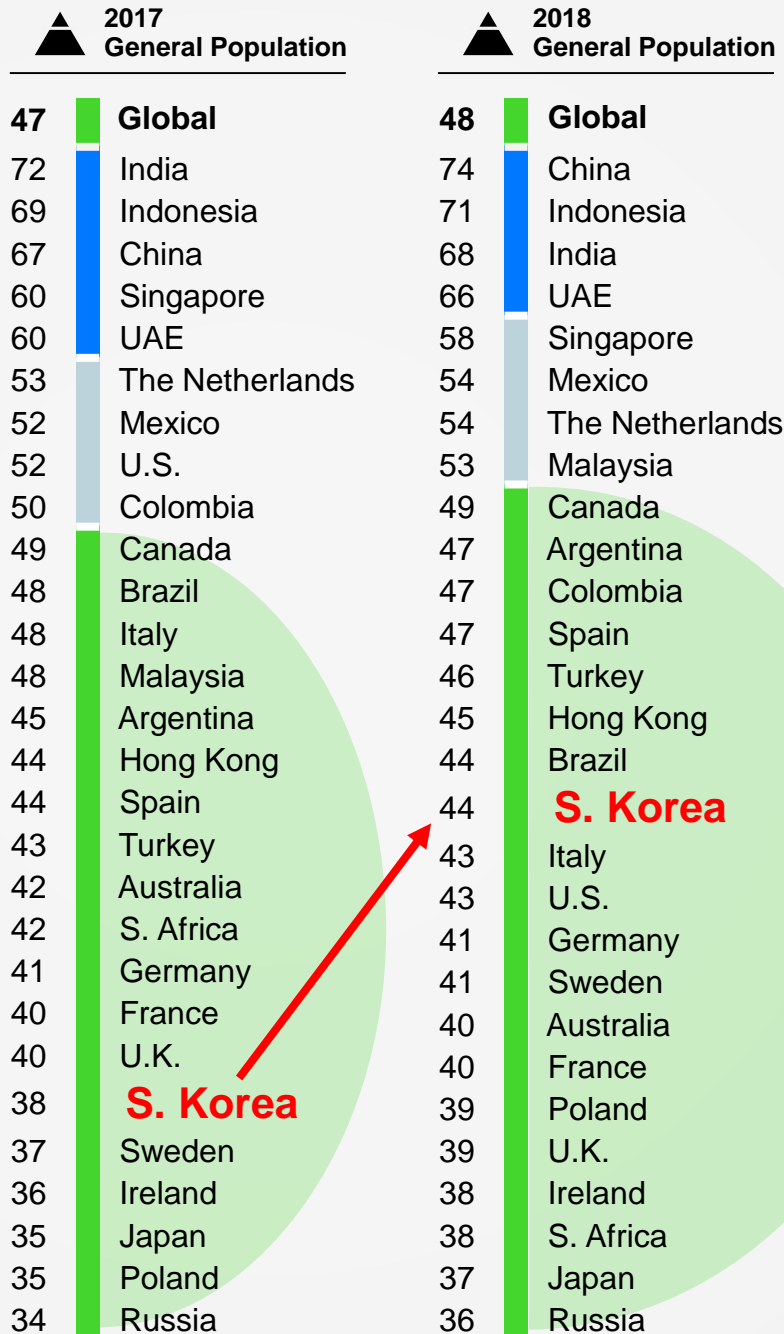
Trust Index A World of Distrust

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

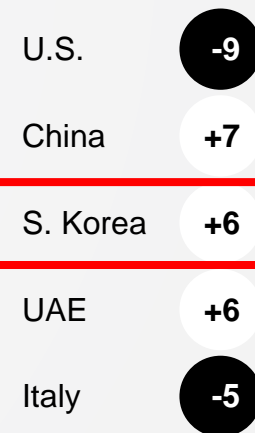
Global Trust Index remains at distruster level

20 of 28 countries are distrusters, up 1 from 2017

Source: 2018 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.



Biggest changes in



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

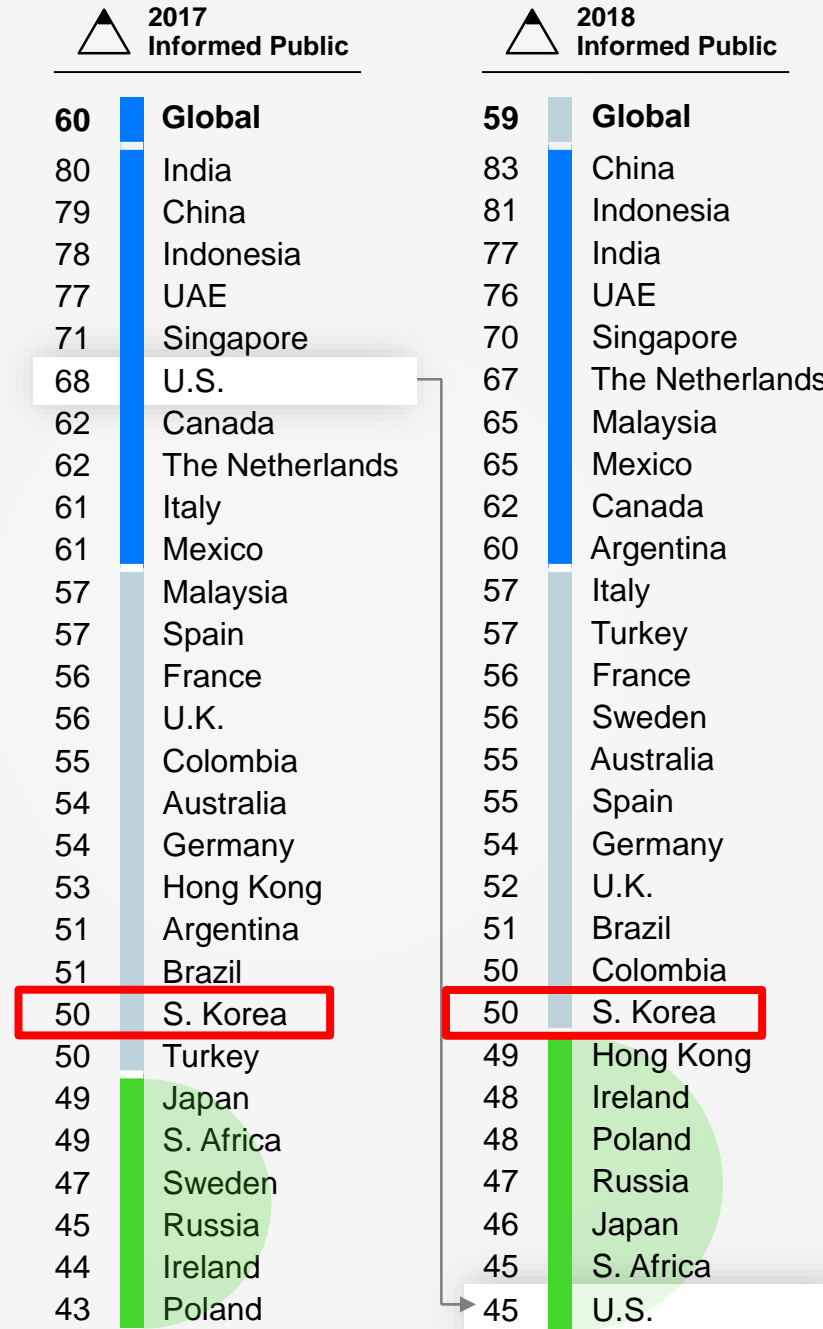


Trust Index Informed Public Declines to Neutral

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 country's trust in the institutions of government, business, media and NGOs. Informed public, 28-country global total.

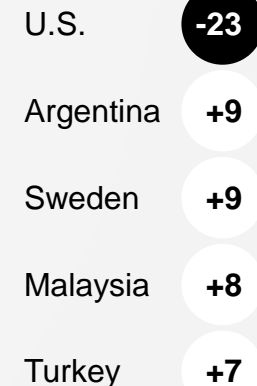


Trust
(60-100)

Neutral
(50-59)

Distrust
(1-49)

Biggest changes in



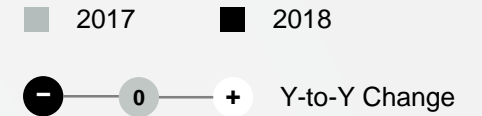
**U.S. Trust Index crashes
23 points**





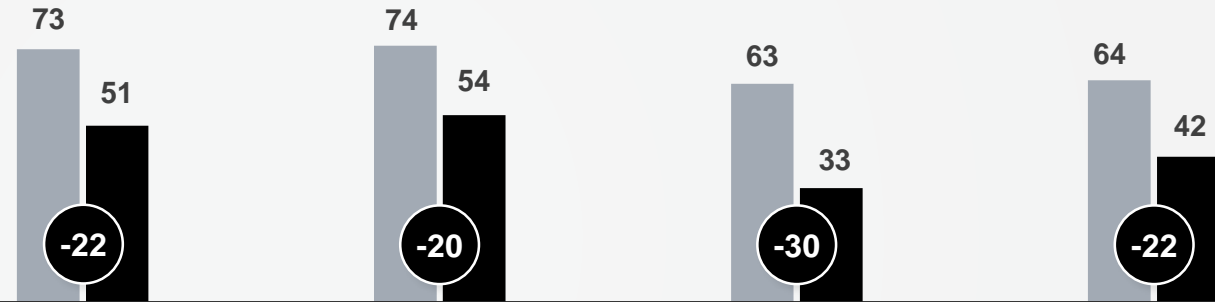
Trust Crash in U.S.

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



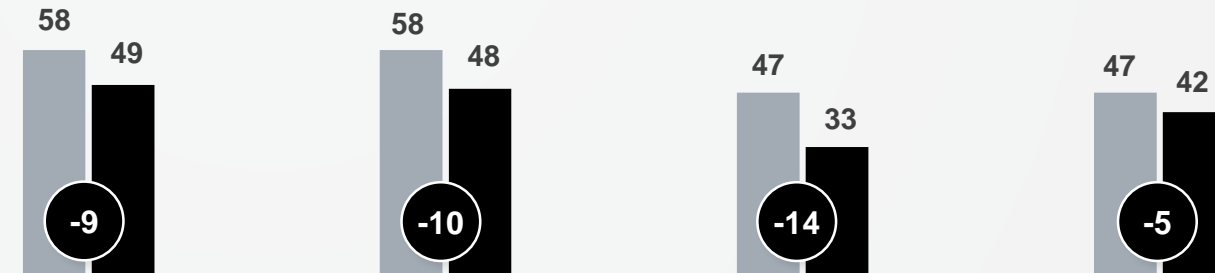
△ Informed Public

23-point decrease
Fell from 6th to last place



▲ General Population

9-point decrease
Fell from 8th to 18th place




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) Informed Public and General Population, U.S. The Trust Index is an average of a country’s trust in the institutions of government, business, media and NGOs. Informed Public and General Population, U.S.





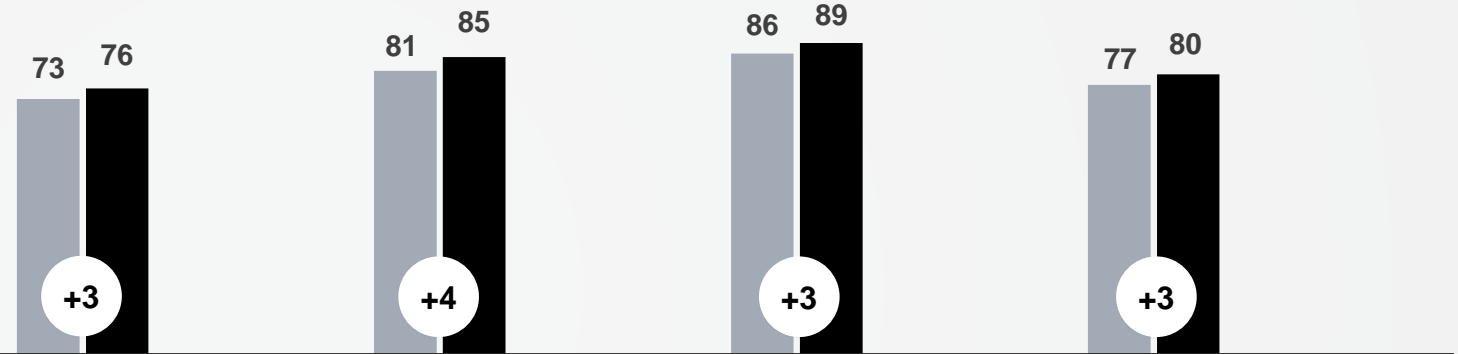
China Rising

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



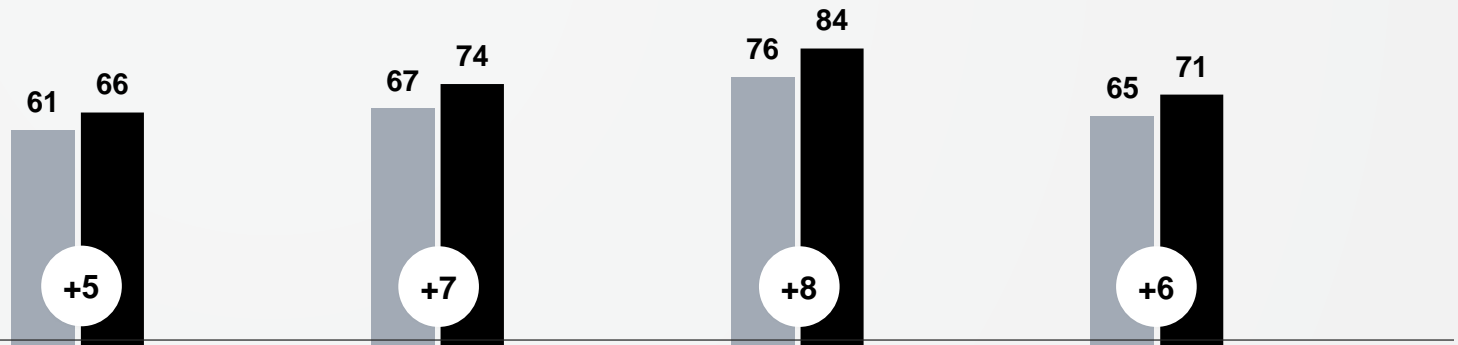
△ Informed Public

4-point increase
Rose from 2nd to 1st place



▲ General Population

7-point increase
Rose from 3rd place to 1st place




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) Informed Public and General Population, China. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and General Population, China.

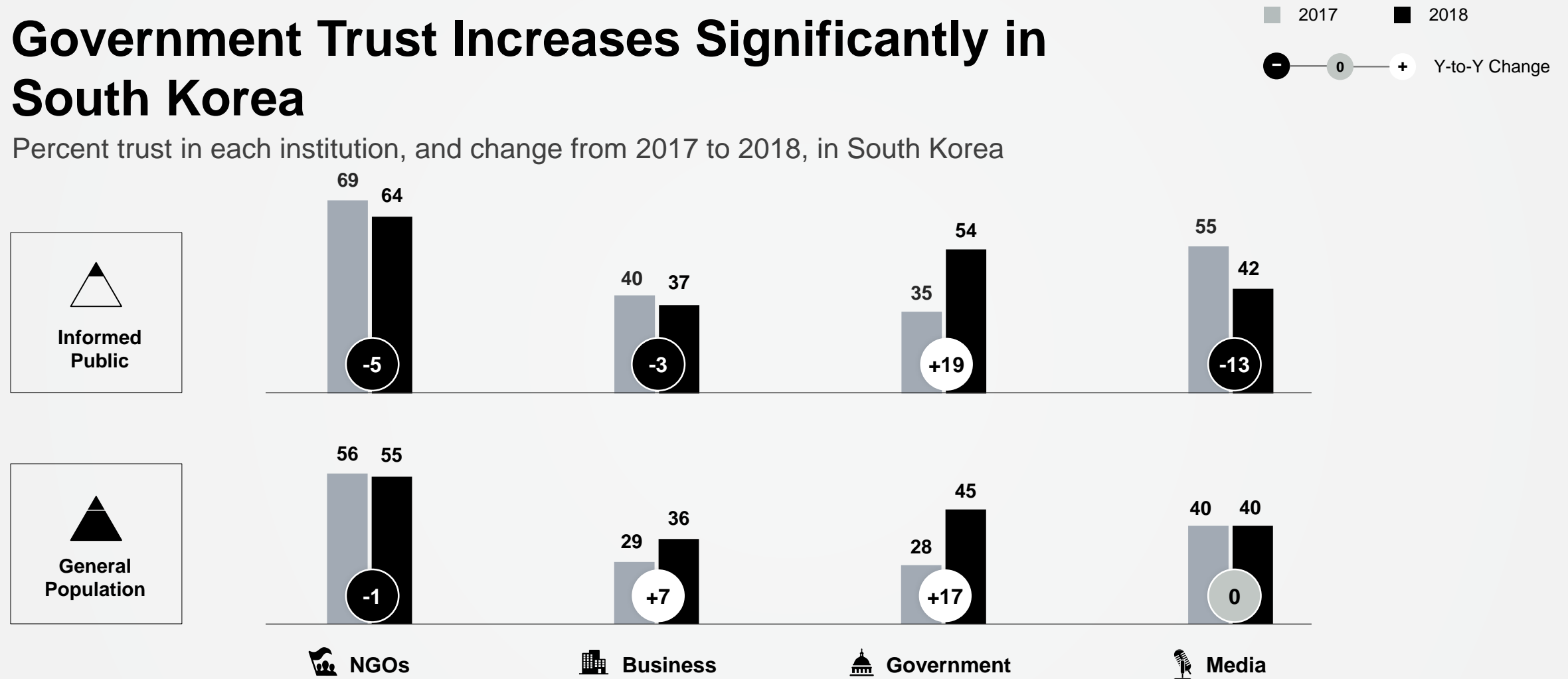




**Government Leadership
is in Alert**

Government Trust Increases Significantly in South Korea

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

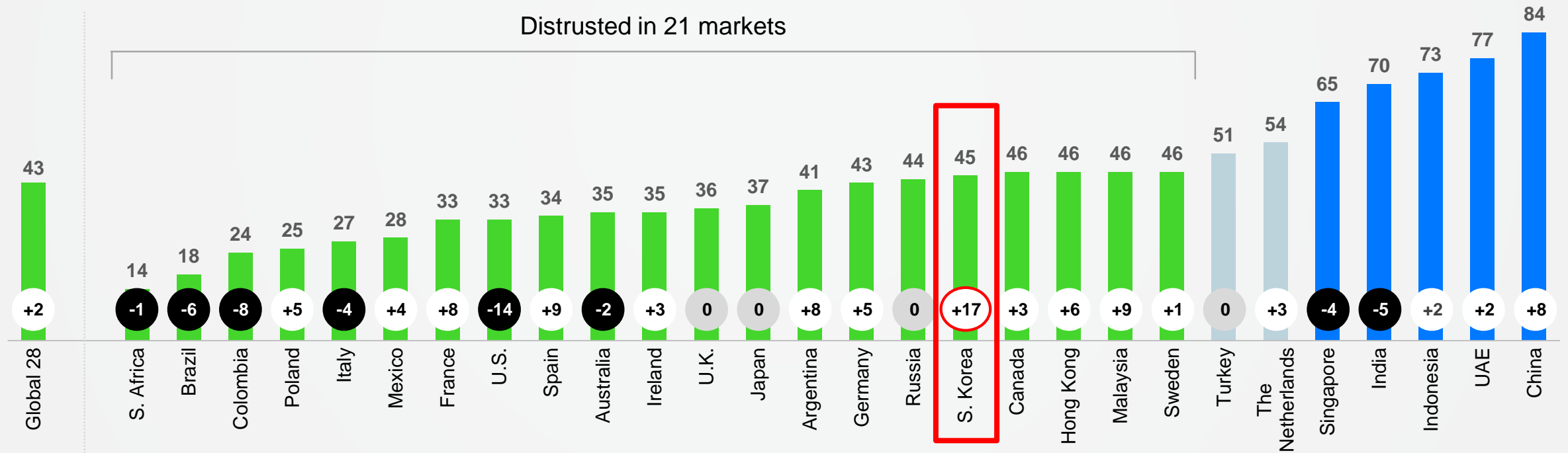
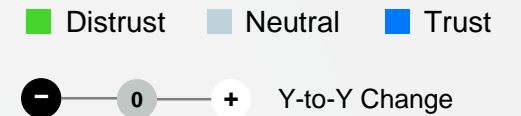


Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and General Population, South Korea.

Trust in Government

Increases in 16 of 28 Markets

Percent trust in government, and change from 2017 to 2018



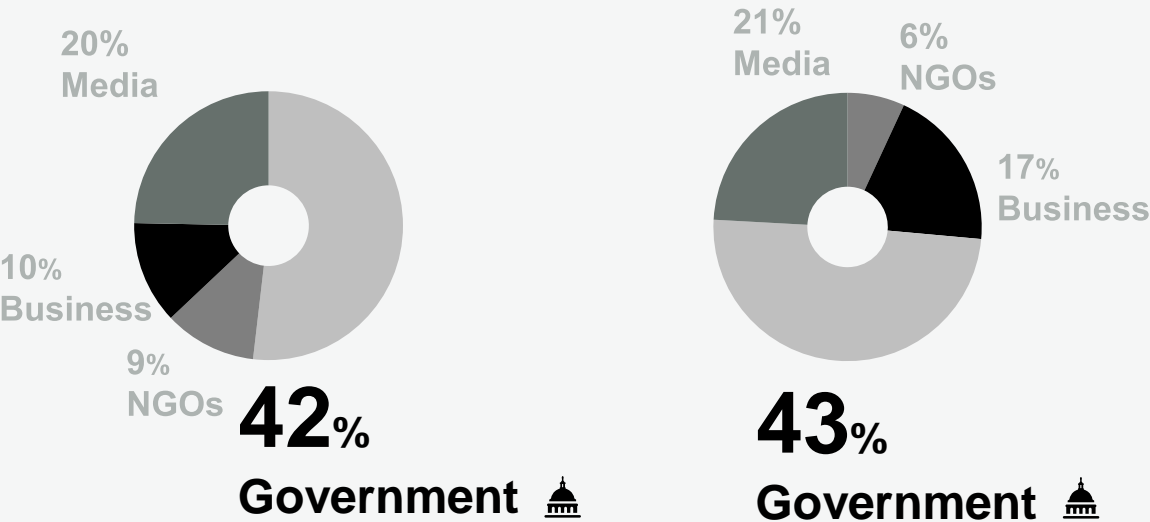
Source: 2018 Edelman Trust Barometer. TRU_INS. [GOVERNMENT IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General Population, 28-country global total.



Government Still Most Broken in South Korea

Which institution is the most broken?

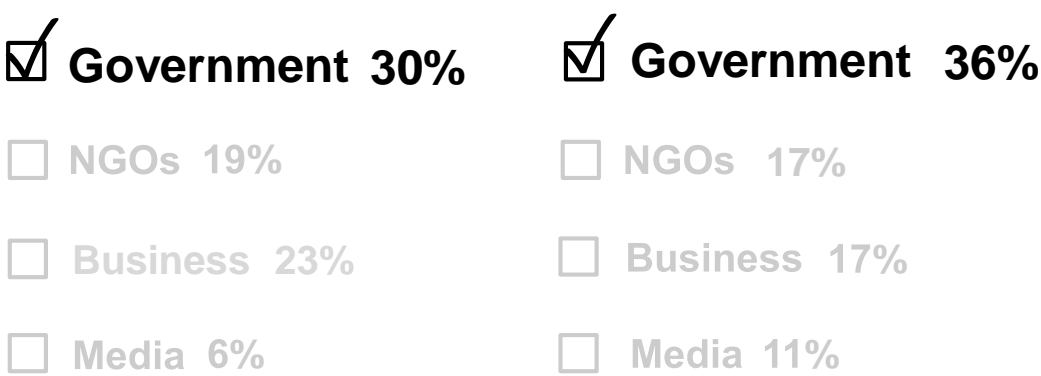
Global



Government Path to Better Future in South Korea

Which institution is most likely to lead to a better future?

Global





























Source: 2018 Edelman Trust Barometer. ATT_STE. Please indicate which institution – Government, Media, Business or NGO’s – is best described by each of the following statements? General population, 28-country global total and South Korea.

Government is Most Broken Yet Most Crucial for Guiding a Market

Which institution is the most broken?

Which institution is most likely to lead to a better future?

Source: 2018 Edelman Trust Barometer. ATT_STE. Please indicate which institution – Government, Media, Business or NGO's – is best described by each of the following statements? General population; APACMEA markets, APAC total and 28-country global total.

	Most Broken		Better Future	
GLOBAL		Government 42%		Government 30%
APAC		Government 32%		Government 40%
Australia		Government 56%		Government 22%
China		Business 38%		Government 68%
Hong Kong		Government 31%		Government 28%
India		Government 30%		Government 44%
Indonesia		Media 31%		Government 59%
Japan		Government 30%		Government 23%
Malaysia		Government 43%		Business 33%
Singapore		Media 25%		Government 53%
S. Africa		Government 82%		Business 45%
S. Korea		Government 43%		Government 36%
UAE		Media 32%		Government 52%

Government's Role as a Social Institution

Percent who rate each as one of the most important responsibilities for government, and percent of those who say government is performing well, APAC region

Responsibilities	Expectation	Performance
BE A GUARDIAN OF FAIRNESS & EQUITY		
Work to ensure that everyone has an equal opportunity to succeed	56	30
Prevent one group from discriminating against another	58	32
Be the champion of the ordinary person, helping to make sure that they are not being cheated or taken advantage of by those with more wealth or power	54	27
FOSTER PROSPERITY		
Drive the economic prosperity of our country	72	44
Foster an environment in which innovation and scientific advancement can thrive	59	40
Work to ensure that our workers have the skills necessary to be competitive in the global job market	50	37
Improve and advance our quality of life	61	37
TAKE CARE OF THE PEOPLE		
Make sure that even the poorest people in society have the minimum they need to live a decent life	67	34
Work to ensure that there are plenty of good job opportunities available	61	34
Make it more difficult for people to make bad decisions regarding their health and well being	37	31
Ensure that future generations are provided for	57	33
Provide society with entertainment and amusement	29	41
Build schools, roads, hospitals and engage in other infrastructure development projects	72	51

Responsibilities	Expectation	Performance
Provide social services such as daycare, education, housing assistance and job training		
	62	41
Keep people safe from physical harm	57	43
Protect people's privacy and personal information	56	37
EDUCATE		
Shape or influence public opinion	32	38
Ensuring that people have access to the information they need to make good life decisions	45	38
Educate people on important social, political and economic issues	51	38
CHECK & BALANCE OTHER SOCIAL INSTITUTIONS		
Serve as a check and balance on the other social institutions preventing them from getting too powerful	49	36
Be the guardian of information quality, working to ensure that only true, verified information is being shared and circulated	48	37
Investigate corruption and wrongdoing	71	43
Support political leaders in realizing their vision from the future of the country	52	41
PROTECT TRADITION		
Be the guardian of the values and morals that made this country great	59	39
Work to ensure that our unique culture, history and traditions are preserved	60	44
Create a sense of community. Foster an environment in which people feel connected to one another	51	38

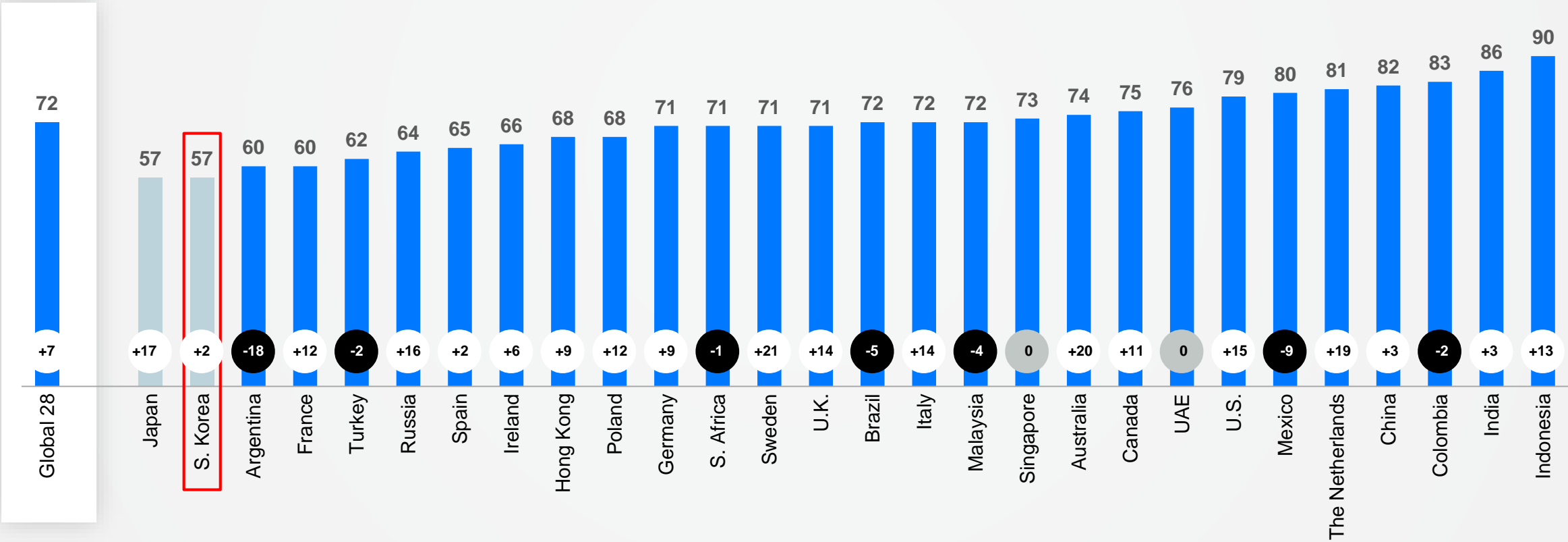
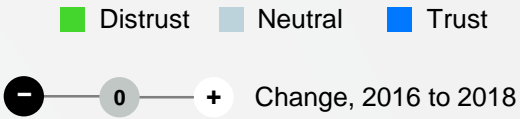
Source: 2018 Edelman Trust Barometer. INS_EXP_GOV. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about government in general, how would you characterize each using the following three-point scale. INS_PER_GOV. How well do you feel the government is currently meeting this obligation to society? Please indicate your answer using the 5-point scale below. (Top 2 Box, Performing well), question only asked of those codes 2 or 3 at the expectation question with data displayed only among code 3. General population, APAC total.

A black and white photograph of two men in business attire shaking hands. The man on the left is seen in profile, wearing a dark suit and white shirt. The man on the right is facing him, smiling, wearing a dark blazer over a light-colored button-down shirt. They are standing in front of a large window that looks out onto a city skyline. Overlaid on the image are several thin, blue, concentric wave-like lines that sweep across the frame from left to right. The text 'Balancing Act for Business' is written in a large, white, sans-serif font across the middle of the image.

Balancing Act for Business

Employers Trusted Around the World

Percent trust in employer, and change from 2016 to 2018



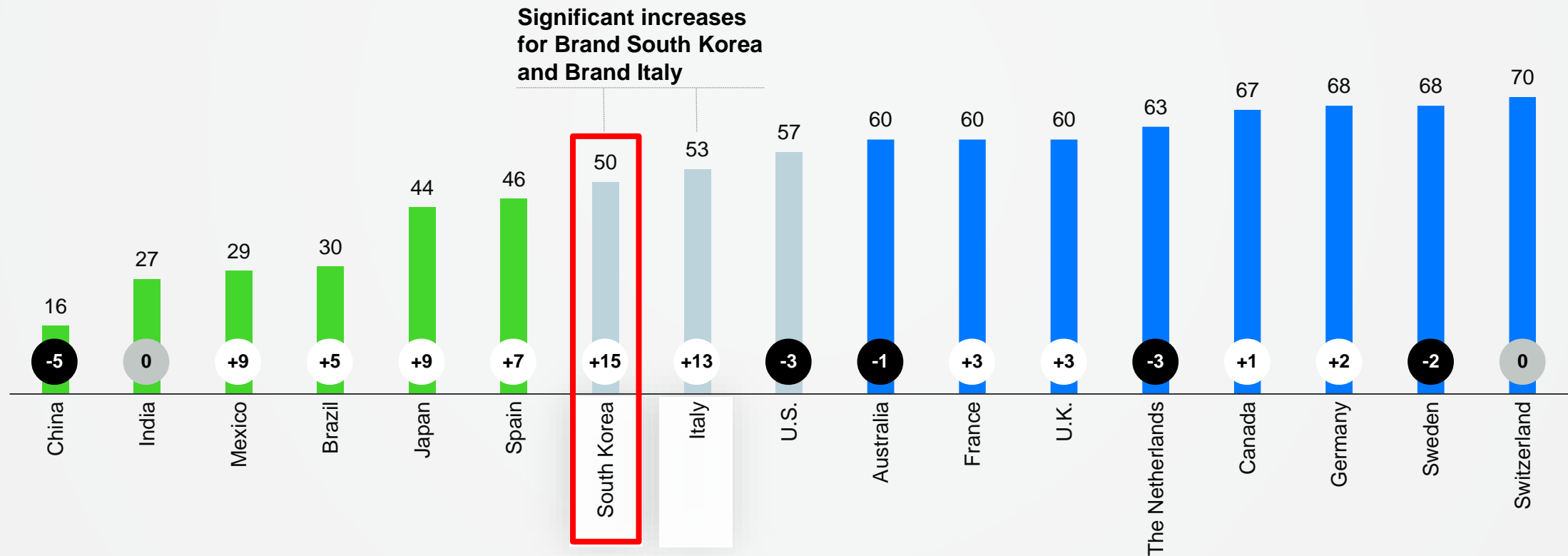
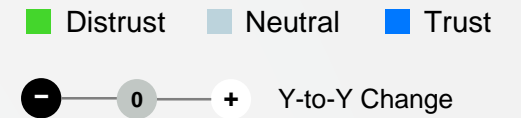
Source: 2018 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General population, 28-country global total.

Note: 2016 data was taken from Q525-526. Thinking about your own company and other companies in your industry, please indicate how much you trust each 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), question asked of half of the sample. General population, 28-country global total.



Largest Increases in S. Korea for Home Brand and Brand Italy

Trust in companies headquartered in each country, and change from 2017 to 2018, in South Korea

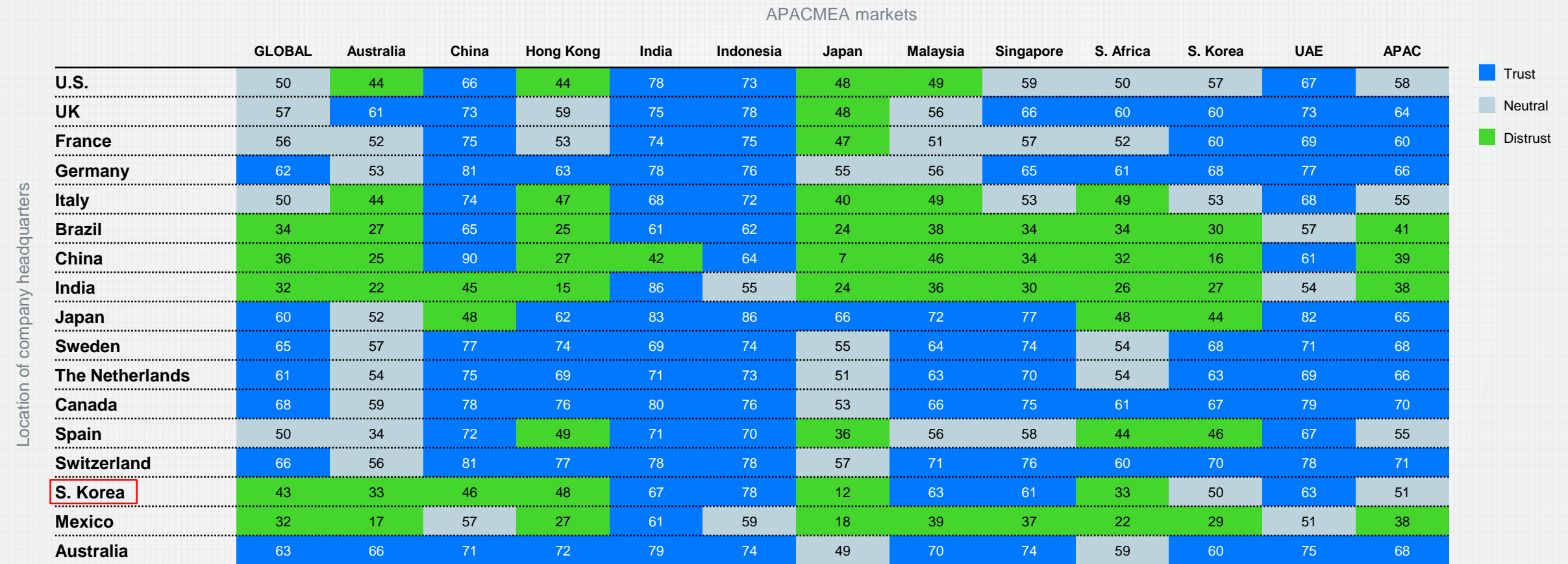


Source: 2018 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust), countries shown to half of the sample. General Population, South Korea.



A Company's Headquarters Impacts Trust in Asia Pacific

Percent trust in companies headquartered in each market

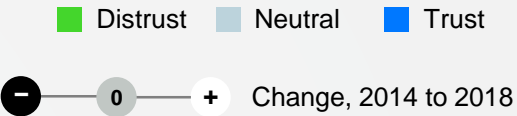
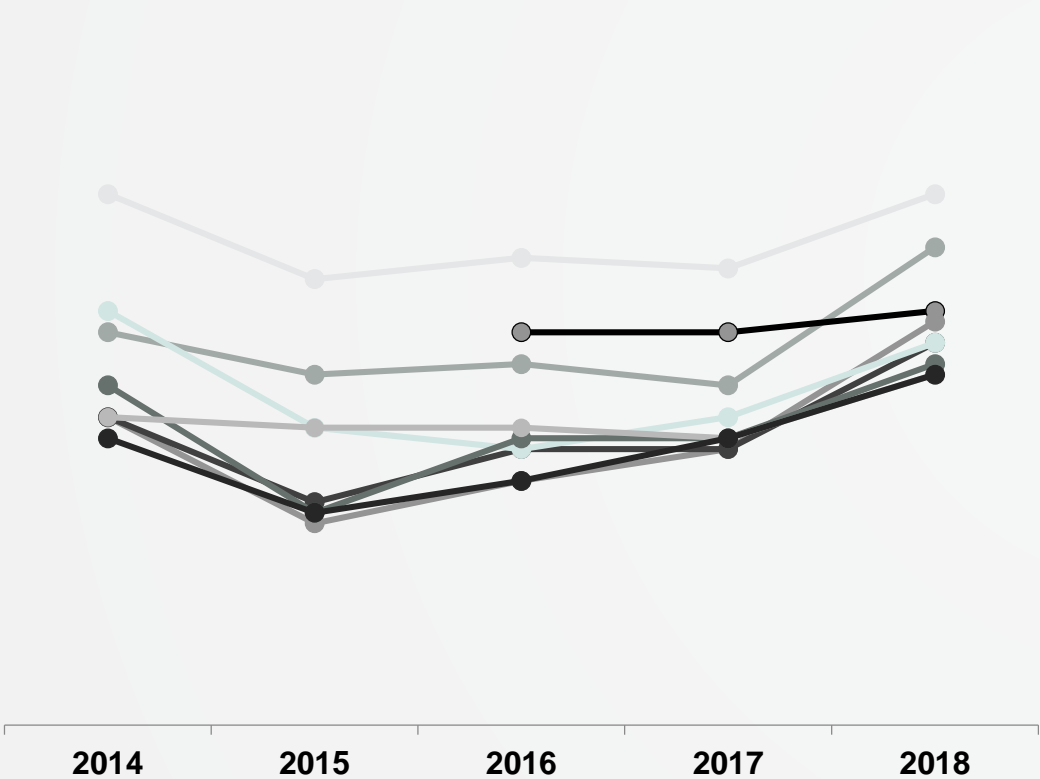


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Sector Trends

All Sectors Rebound, Except Automotive

Trust in each industry sector, and change from 2014 to 2018, in South Korea



Industry	2014	2015	2016	2017	2018	5 yr. Trend
Technology	75	67	69	68	75	0
Energy	62	58	59	57	70	+8
Health care	-	-	62	62	64	-
Telecommunications	54	44	48	51	63	+9
Consumer packaged goods	54	46	51	51	61	+7
Automotive	64	53	51	54	61	-3
Financial services	57	45	52	52	59	+2
Entertainment	54	53	53	52	58	+4
Food and beverage	52	45	48	52	58	+6

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. General Population, South Korea.



Business Is Expected to Lead

Percent who agree and percent who say each is one of the most important expectations they have for a CEO, in South Korea

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

79%

For CEOs, building trust is job one

Ensure their company is trusted 84

Products and services are high quality 76

Communicate regularly with employees 72

Set high ethical standards 71

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. General population, South Korea.

Helping CEOs and Business Find Its Moral Compass

Percent who agree with this statement

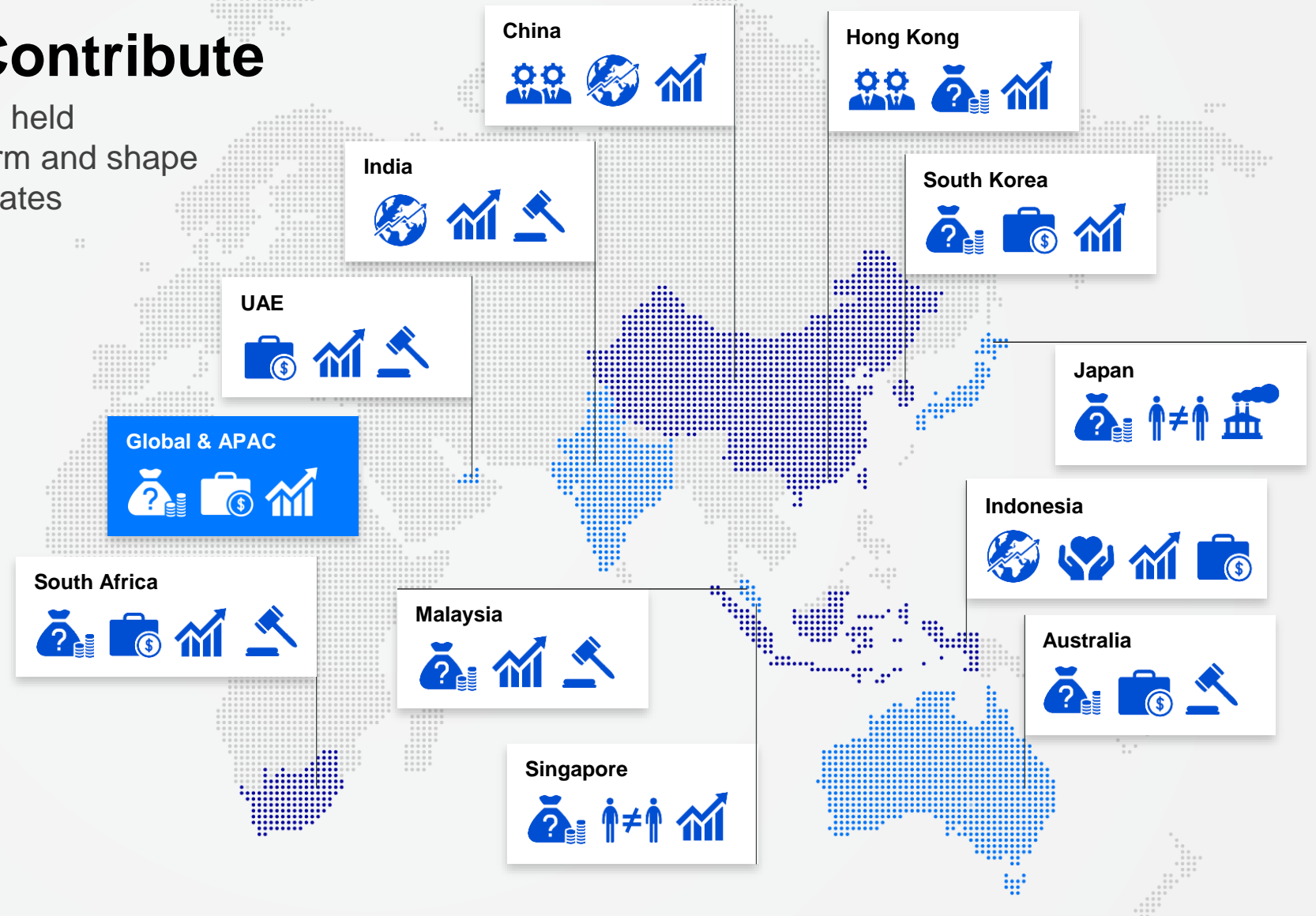
I have no respect for CEOs that remain silent on important issues	Global	Australia	China	Hong Kong	India	Indonesia	Japan	Malaysia	Singapore	S. Africa	S. Korea	UAE	APAC
	56	51	66	50	70	59	53	65	60	66	73	64	61
In the long run, a company is more likely to succeed if it takes a stand on important societal issues than if it stays silent	Global	Australia	China	Hong Kong	India	Indonesia	Japan	Malaysia	Singapore	S. Africa	S. Korea	UAE	APAC
	61	53	74	56	75	73	51	71	62	66	70	65	65
CEOs are driven more by greed than a desire to make a positive difference in the world	Global	Australia	China	Hong Kong	India	Indonesia	Japan	Malaysia	Singapore	S. Africa	S. Korea	UAE	APAC
	60	66	52	57	65	49	39	57	58	63	76	59	58

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. General population; 28-country global total and APACMEA markets.

CEOs Expected to Contribute

Top issues corporate CEOs should be held responsible for directly helping to inform and shape ongoing conversations and policy debates

-  Technology and automation's impact on jobs
-  Corruption
-  Prejudice and discrimination
-  Globalization and its impact on the economy
-  Global warming and climate change
-  Improving the healthcare system
-  Creating new, well-paying jobs
-  How to strengthen and growth the economy
-  The impact of new regulations on their industry



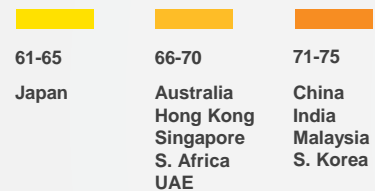
Source: 2018 Edelman Trust Barometer. CEO_RSP. For each of the following topics, please indicate to which degree corporate CEOs should be held responsible for directly helping to inform and shape ongoing conversations and policy debates. (Mandatory for CEOs). General population; 28-country global total, APAC total and APACMEA markets.



In Search of Truth

World Worried About Fake News as a Weapon

Percent who worry about false information or fake news being used as a weapon



Nearly
7 in 10
worry about false information or fake news being used as a weapon, globally

China: Military sets up website to report leaks, fake news

South Korea: Presidential election affected by fake news

India: Declining price of smartphones and data prices leads to surge in fake news

Indonesia: Jakarta governor targeted for his race and religion in election

Malaysia: Government plans to clamp down on fake news ahead of election

South Africa: Fake news disrupts elections

Singapore: Government poll: 90 percent of Singaporeans support stronger laws to remove or correct fake news

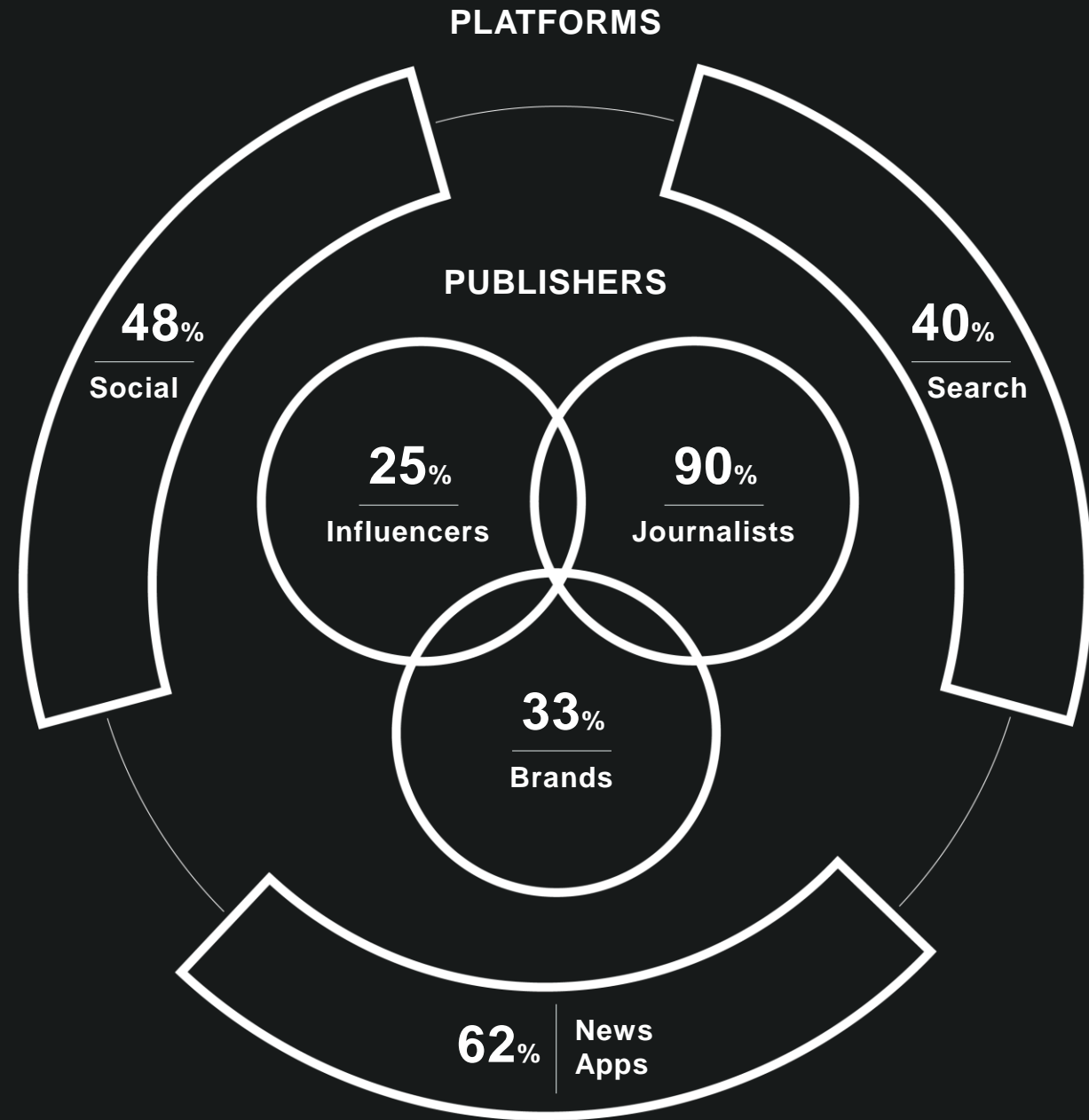
Australia: Study finds most young Australians cannot identify fake news online

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. General population; 28-country global total.

People Define “Media” As Both Content and Platforms

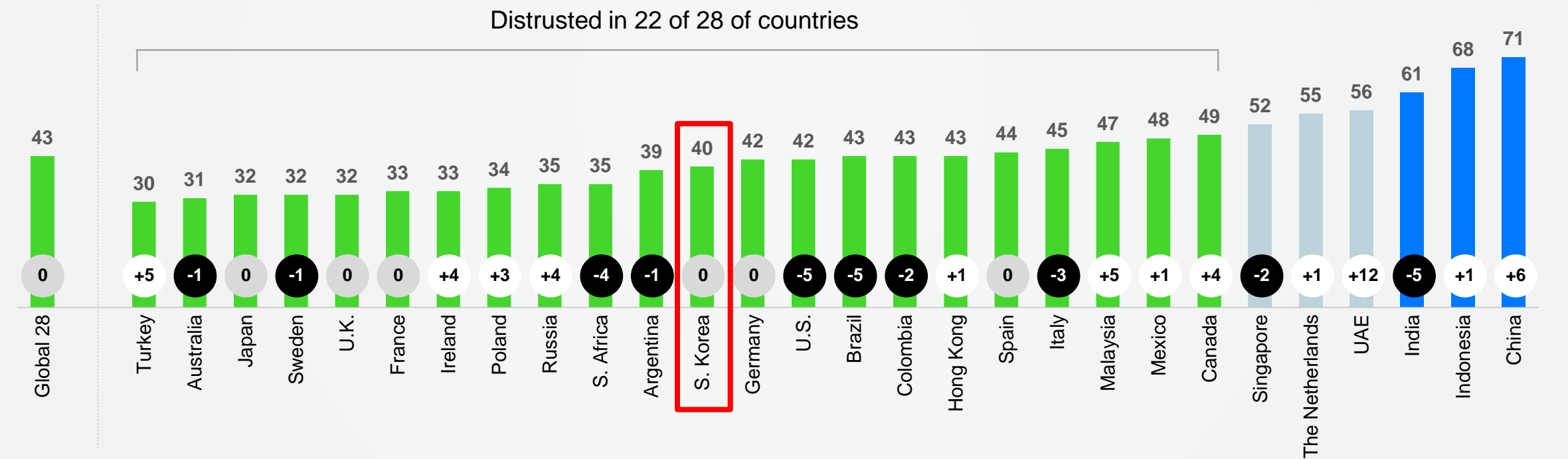
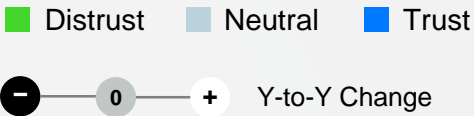
What did you assume was meant by
the phrase “media in general”?

Source: 2018 Edelman Trust Barometer. TRU_MED. In the above question, what did you assume was meant by the phrase “media in general”? General population, South Korea. Social is a net of TRU_MEDr3 and r12, Influencers is r5, Search is r7, Brands is a net of r10 and r11, Journalists is a net of r1 and r6, News Apps is r8.



Media Now Least Trusted Institution Globally

Percent trust in media, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU_INS. [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.



6 in 10 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. General population, South Korea. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

60%

The Disengaged

Consume news less than weekly

18%

Consumers

Consume news about weekly or more

22%

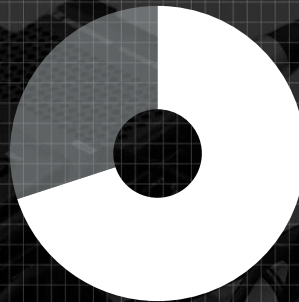
Amplifiers

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

Skeptical About News Organizations

Percent who agree that news organizations are overly focused on ...

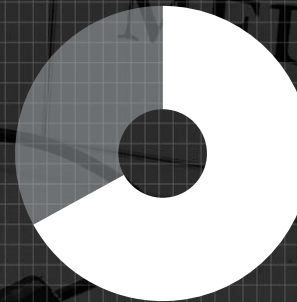
Attracting Large Audiences



70%

are more concerned with attracting a big audience than reporting

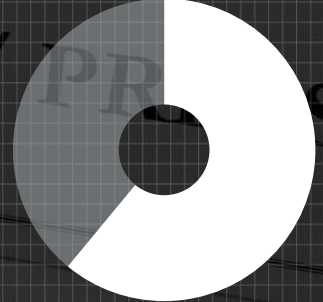
Breaking News



67%

sacrifice accuracy to be the first to break a story

Politics



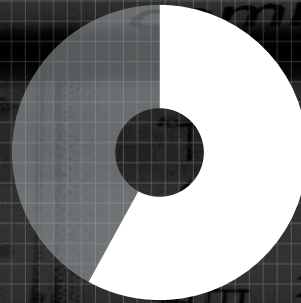
61%

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. General population, South Korea.

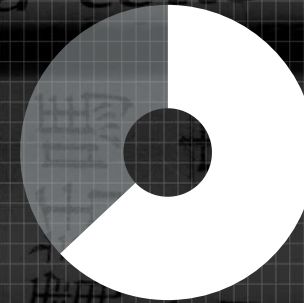
Uncertainty Over Real vs. Fake News

Percent who agree that ...



58%

The average person does not know how to tell good journalism from rumor or falsehoods



63%

It is becoming harder to tell if a piece of news was produced by a respected media organization

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. General population, South Korea.

Media Failing to Meet Expectations

Top three trust-building mandates for media, and percent who say the media is performing well or very well against them, in South Korea

Trust-Building Mandate	Performance Score
Shape public opinion	60%
Inform good life decisions	51%
Guard information quality	41%

Source: 2018 Edelman Trust Barometer. Trust-building mandates Analysis. The most effective trust building mandates for each institution. INS_EXP_MED. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about the media in general, how would you characterize each using the following three-point scale. INS_PER_MED. How well do you feel the media is currently meeting this obligation to society? Please indicate your answer using the 5-point scale below. (Top 2 Box, Performing well), question only asked of those codes 2 or 3 at the expectation question with data displayed only among code 3. General population, South Korea. For more details on the Trust-building mandates Analysis, please refer to the Technical Appendix.

Lack of Confidence in Media Undermining Trust and Truth

Percent of respondents who feel they are experiencing these consequences as a result of media not fulfilling its responsibilities, in South Korea

Loss of Truth

I am not sure what is true and what is not

61%

Loss of Trust in Government Leaders

I do not know which politicians to trust

49%

Loss of Trust in Business

I don't know which companies or brands to trust

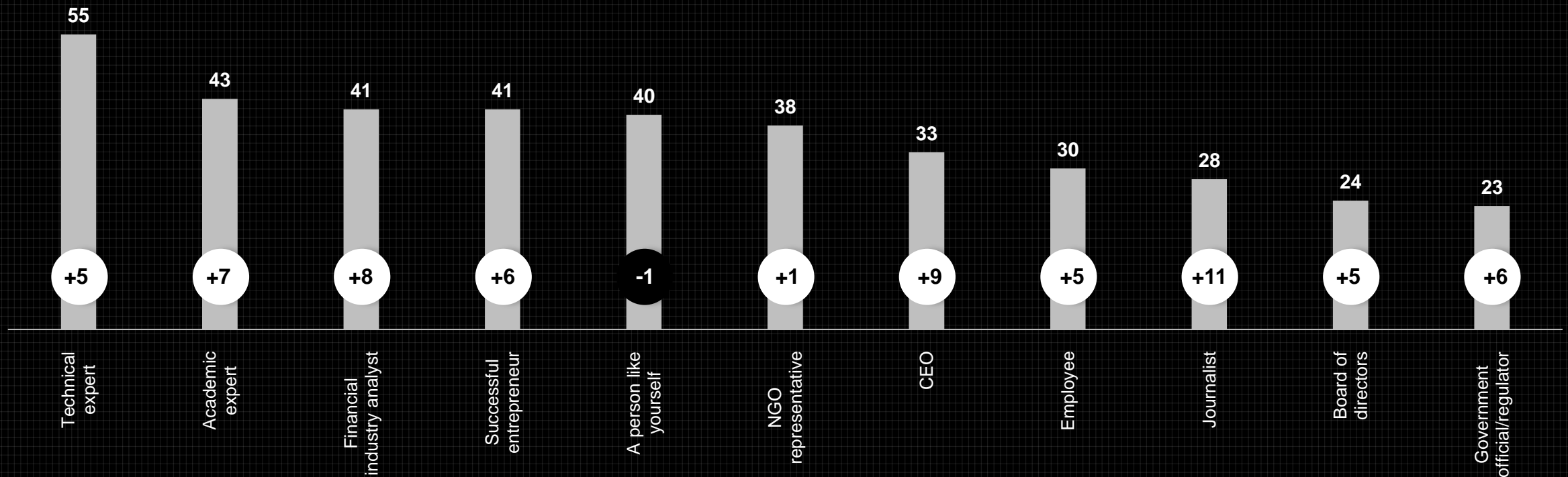
34%

Source: 2018 Edelman Trust Barometer. MED_CON. What consequences are you experiencing as a direct result of the media not doing a good job fulfilling its responsibilities? Question asked of those who answered codes 1-3 at MED_RSP. General population, South Korea.

Voices of Authority Regain Credibility

Percent who rate each spokesperson as very/extremely credible, and change from 2017 to 2018, in South Korea

— 0 + Y-to-Y Change



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. General population, South Korea.

Every Company is a Media Company

Which do you believe is more likely to give you the truth?

Message



Data and statistical analysis



The personal experiences of people you know

Sources



Individual people



Institutions and organizations

Format



A long, detailed argument with lots of supporting data



A short communication that makes a simple point



Words



Video

Global

APAC

UAE

South Africa

Malaysia

Singapore

India

China

Hong Kong

South Korea

Japan

Indonesia

Australia

Source: 2018 Edelman Trust Barometer. COM_RFB. 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, APAC total and APACMEA markets.

Navigating a Polarized World

- 1 Go beyond business
- 2 Localize trust-building strategies
- 3 Speak up on key issues
- 4 Inform and engage
- 5 Communicate through trusted voices
- 6 Activate entire organization

Source:



Thank You

#TrustBarometer

