

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

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).

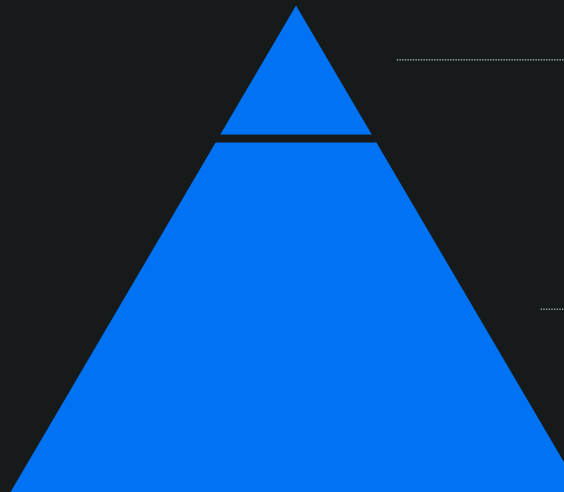
General Online Population

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

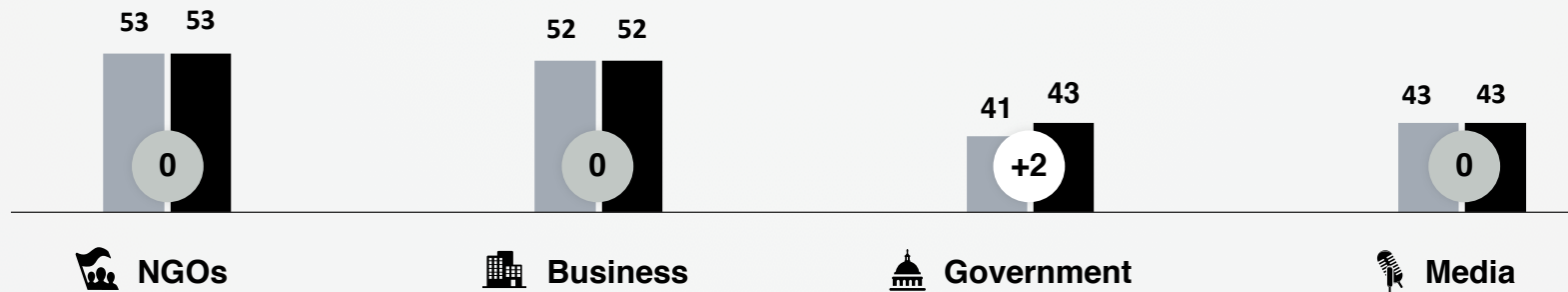
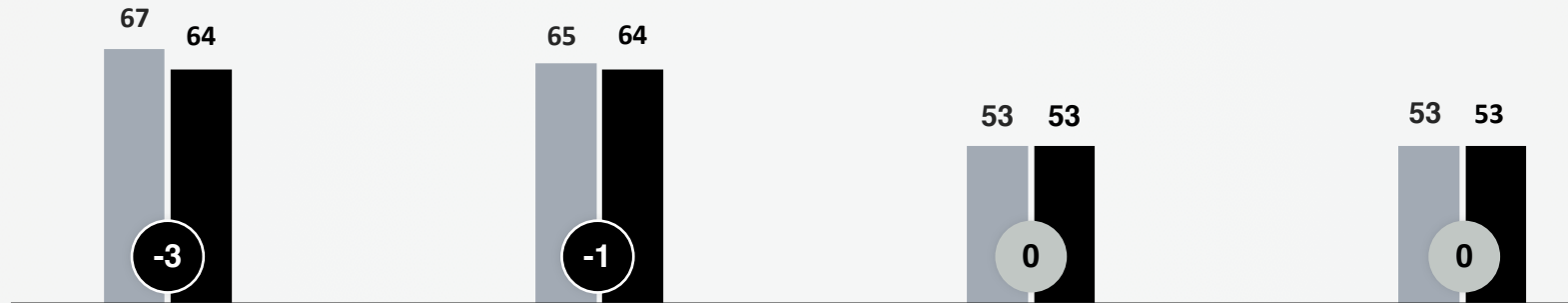
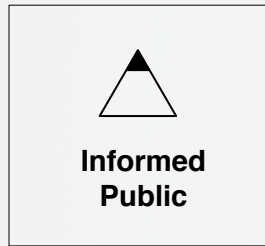
Represents 85% of total global population



A Polarization of Trust

No Recovery in Trust

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-market global total.

Trust Index A World of Distrust

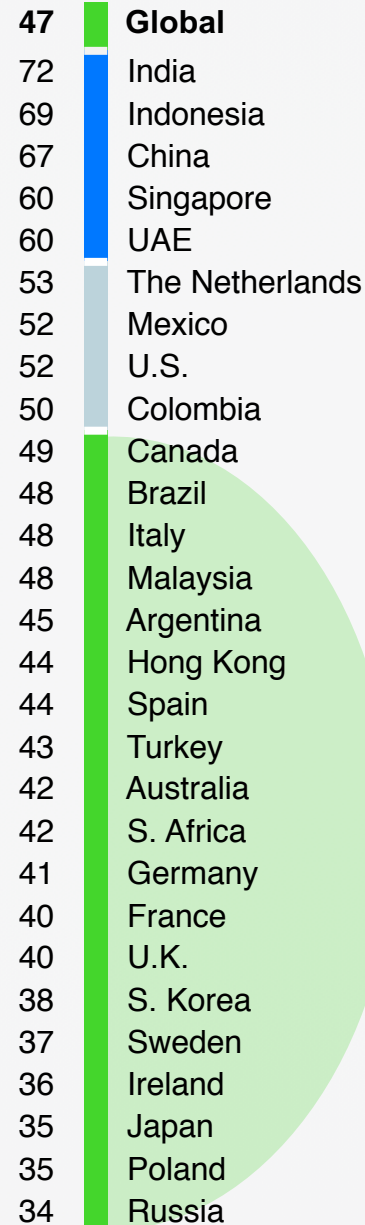
Average trust in institutions,
general population, 2017 vs. 2018

Global Trust Index remains at distruster level

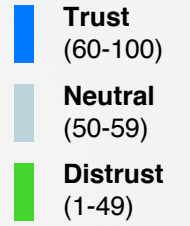
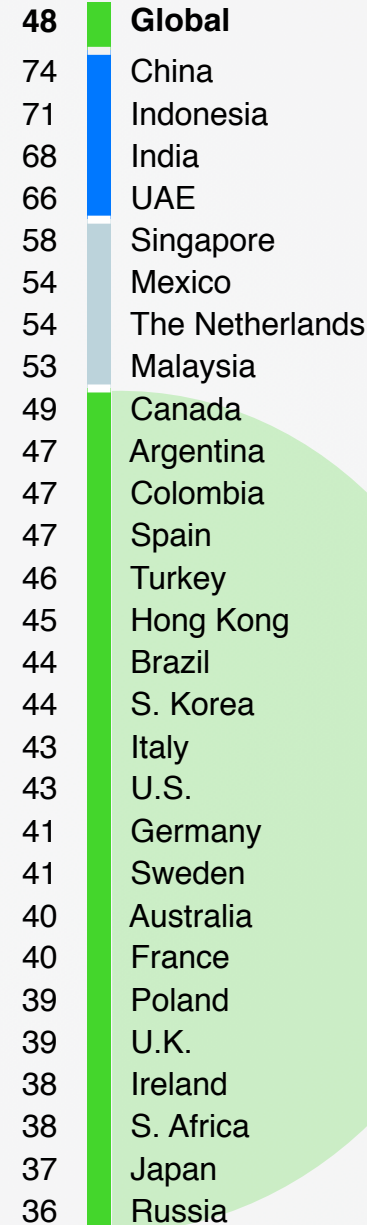
20 of 28 markets are distrusters, up 1 from 2017

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.

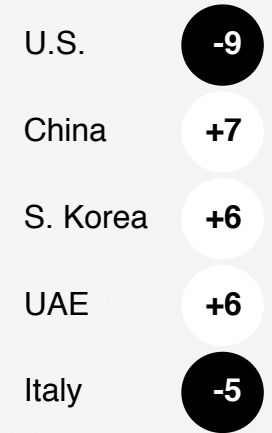
▲ 2017 General Population



▲ 2018 General Population



Biggest changes in



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

Trust Index Informed Public Declines to Neutral

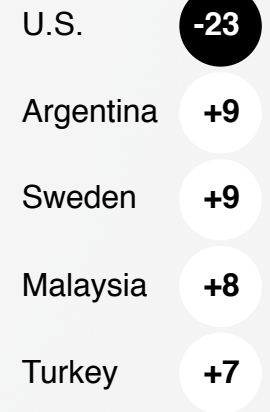
Average trust in institutions,
informed public, 2017 vs. 2018

A 1-point decline in the Global Trust Index

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



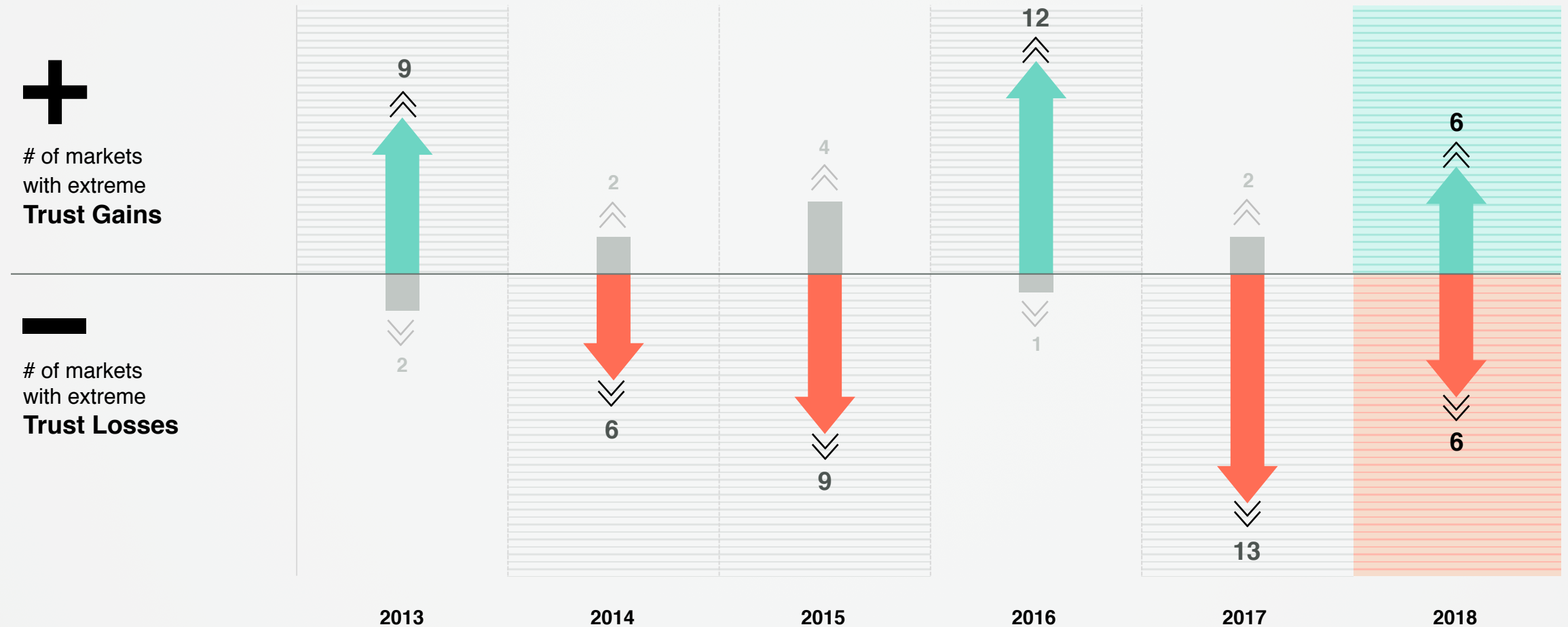
Biggest changes in



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

A World Moving Apart

Number of markets with extreme changes in their aggregate trust in the four institutions, 2013 to 2018



Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2013-2018) percentage point change across the four institutions (TRU_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.

The Polarization of Trust

Aggregate percentage point change in trust in the four institutions, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2017-2018) percentage point change across the four institutions (TRU_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.



State of Trust in Business

Without Trust, They Will Stop Buying

“ A good reputation may get me to try a product—but **unless I come to trust the company behind the product I will soon stop buying it, regardless of its reputation**”

63% agree

Trust-building mandates for business

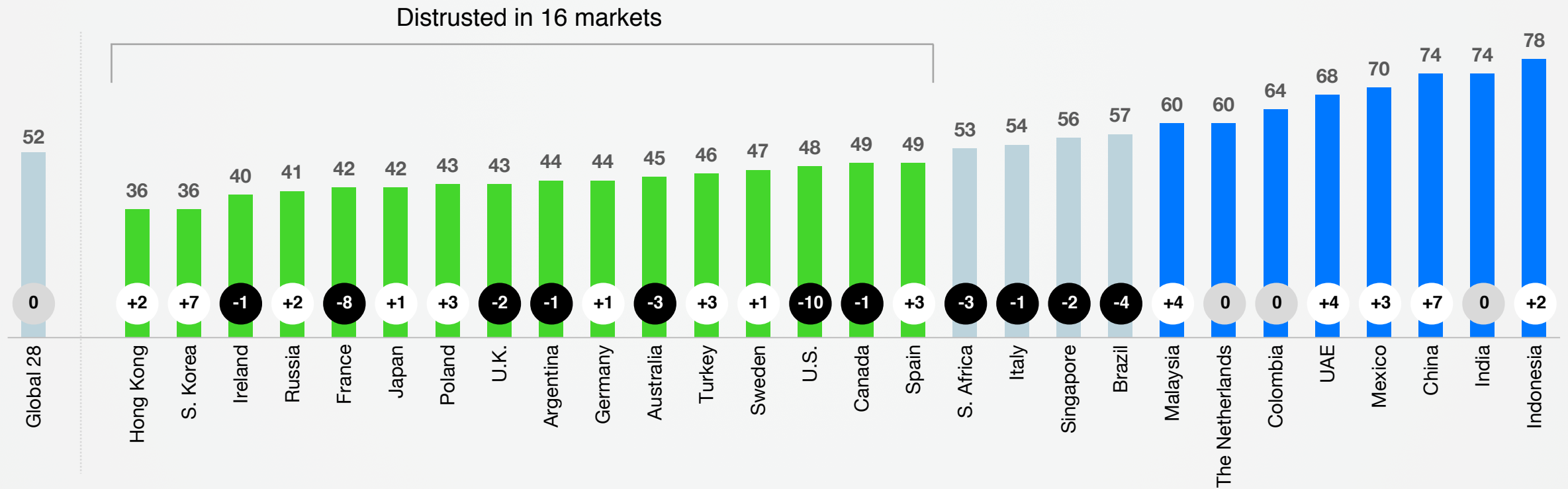
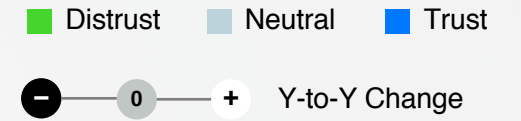
- 1 Safeguard privacy
- 2 Drive economic prosperity
- 3 Invest in jobs
- 4 Ensure competitive workforce
- 5 Consumer safety

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. Trust-building mandates Analysis. The most effective trust building mandates for each institution. INS_EXP_BUS. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about business in general, how would you characterize each using the following three-point scale. Question asked of one-third of the sample. General Population, 28-market global total.

Trust in Business

Increases in 14 of 28 Markets

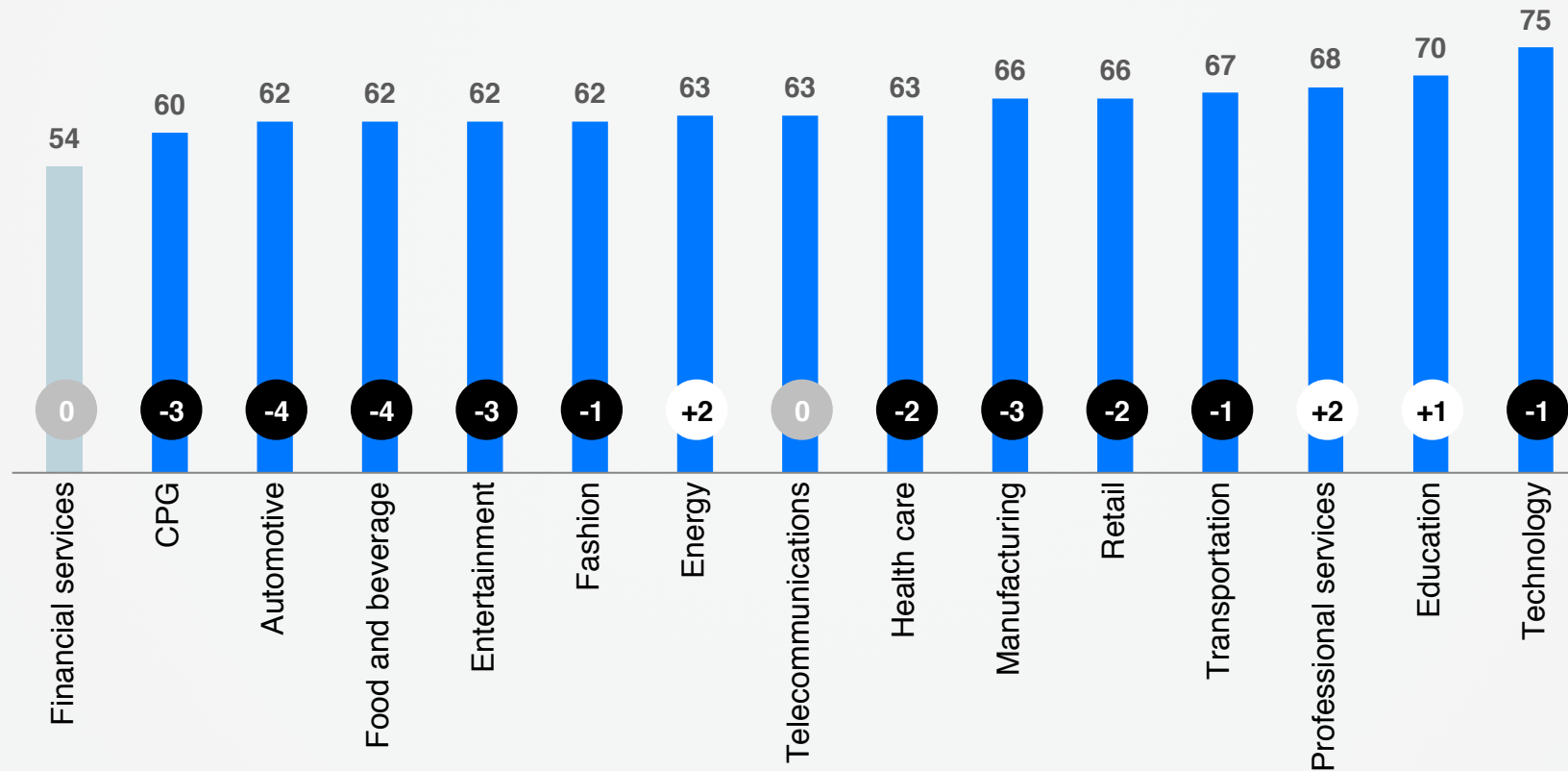
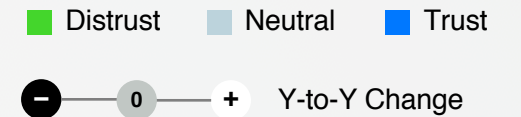
Percent trust in business, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU_INS. [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-market global total.

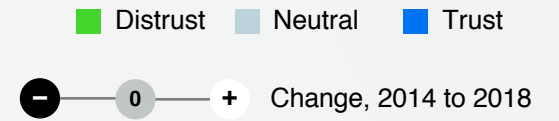
Most Sectors Remain Trusted, Despite Declines in 10 of 15 Sectors Measured

Percent who trust each sector, and change from 2017 to 2018

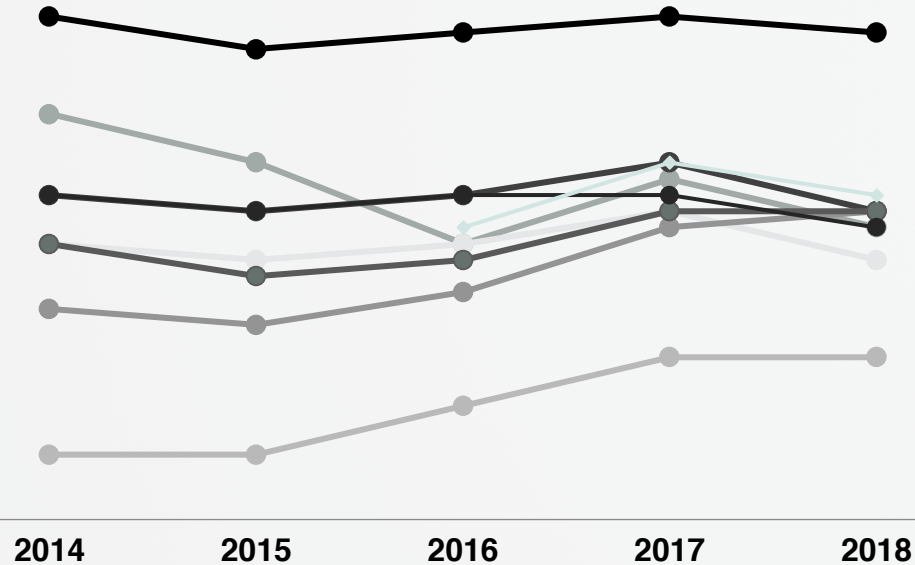


Source: 2018 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. (Top 4 Box, Trust), industries shown to half of the sample. General Population, 28-market global total.

Steady Recovery in Financial Services, Energy; Automotive Declining



Trust in each sector, and change from 2014 to 2018

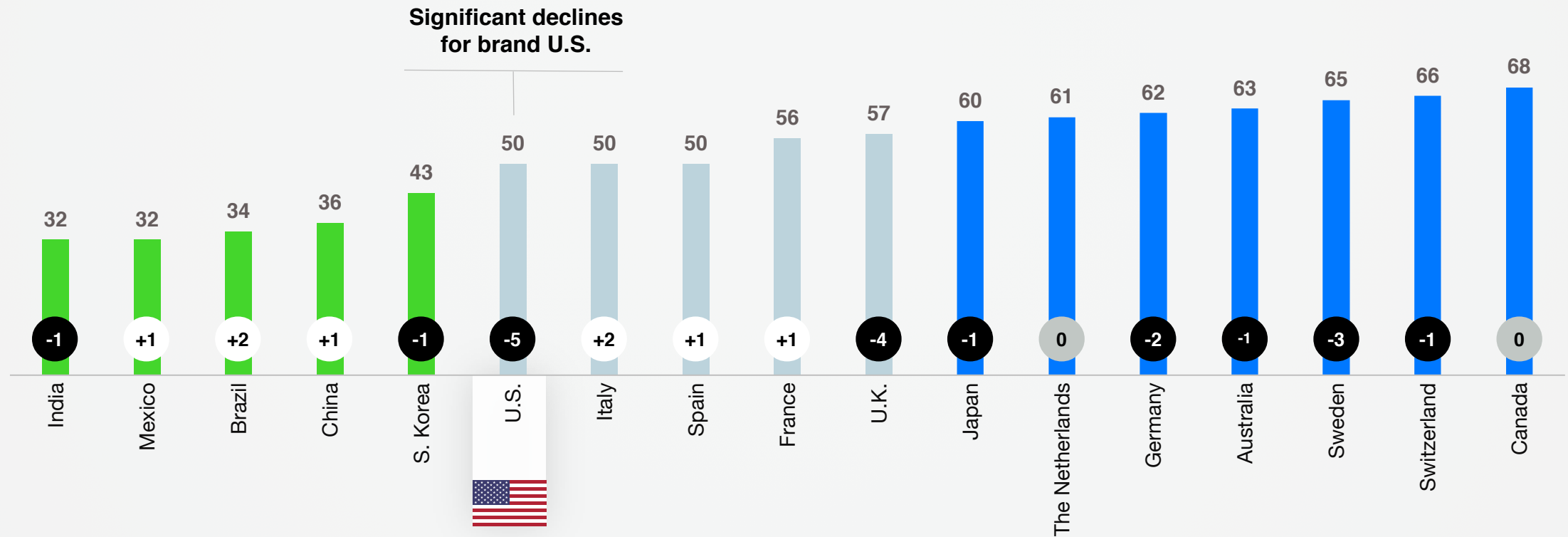
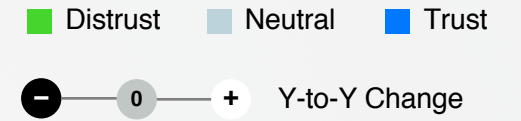


Industry	2014	2015	2016	2017	2018	5 yr. Trend
Technology	75%	73%	74%	75%	74%	-1
Health Care	-	-	62%	66%	64%	-
Energy	57%	56%	58%	62%	63%	+6
Food And Beverage	64%	63%	64%	66%	63%	-1
Telecommunications	61%	59%	60%	63%	63%	+2
Automotive	69%	66%	60%	65%	62%	-7
Entertainment	64%	63%	64%	64%	62%	-2
Consumer Packaged Goods	61%	60%	61%	63%	60%	-1
Financial Services	48%	48%	51%	54%	54%	+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, 27-market global total.

Trust Declines in Nine Country Brands

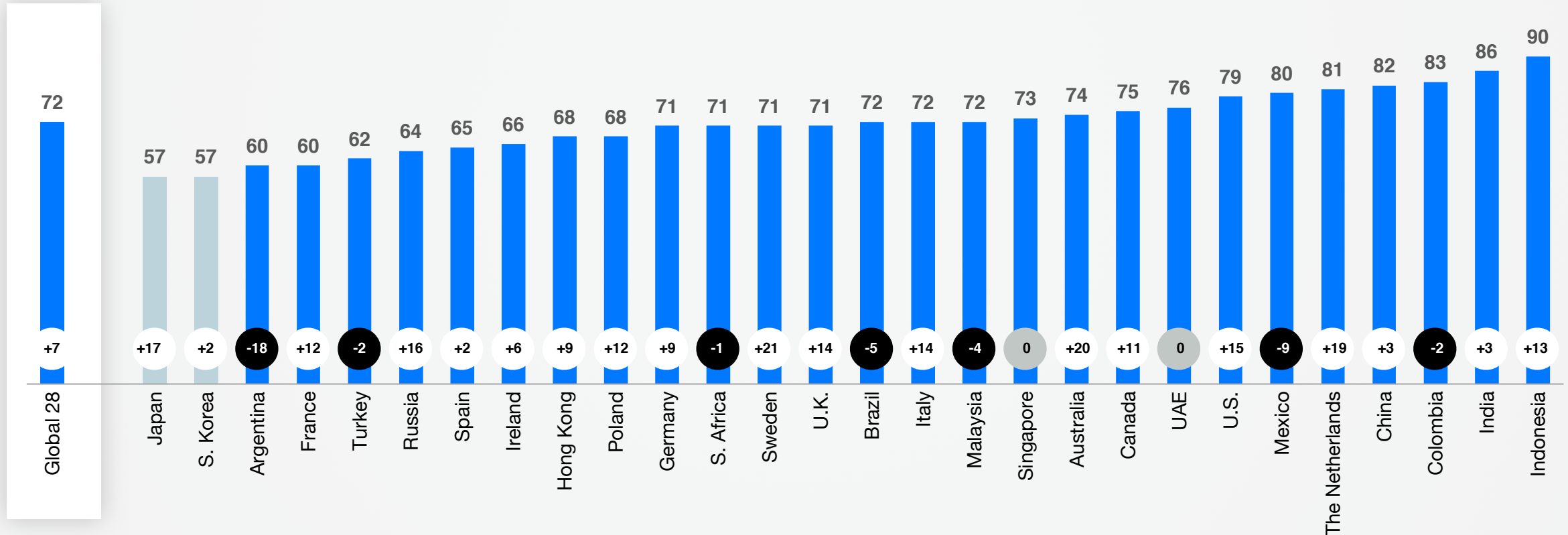
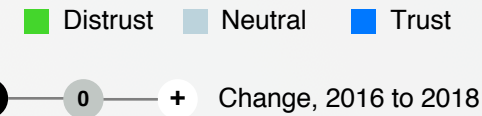
Trust in companies headquartered in each country, and change from 2017 to 2018



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, 28-market global total.

Employers Trusted Around the World

Percent trust in employer, and change from 2016 to 2018

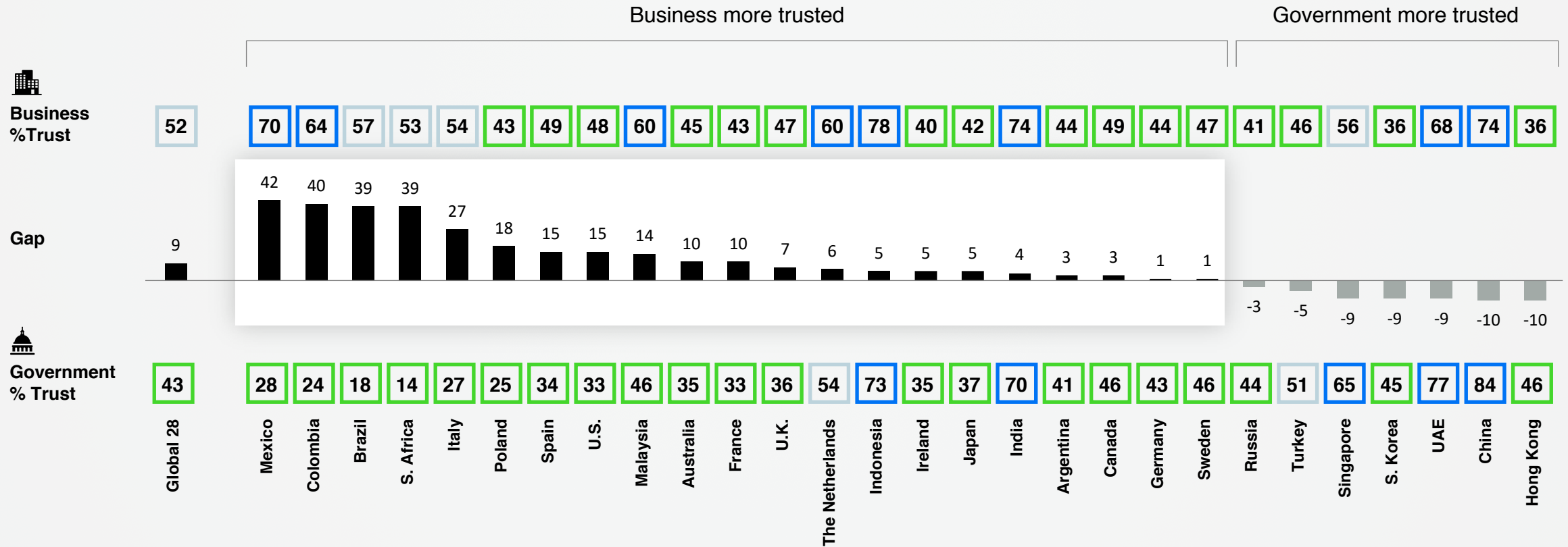


Source: 2018 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great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

Business More Trusted Than Government in 21 Markets

■ Distrust
 ■ Neutral
 ■ Trust

Gap in trust in business vs. government

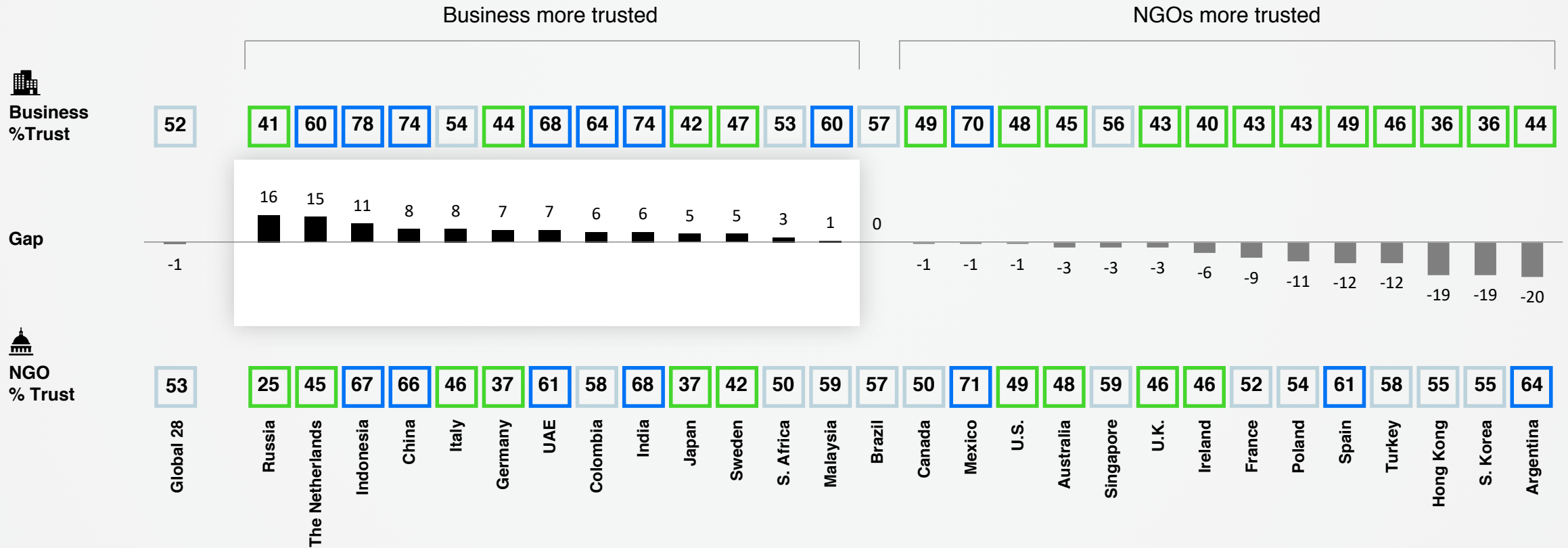


Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4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

Business More Trusted Than NGOs in 13 Markets

■ Distrust
 ■ Neutral
 ■ Trust

Gap in trust in business vs. NGOs



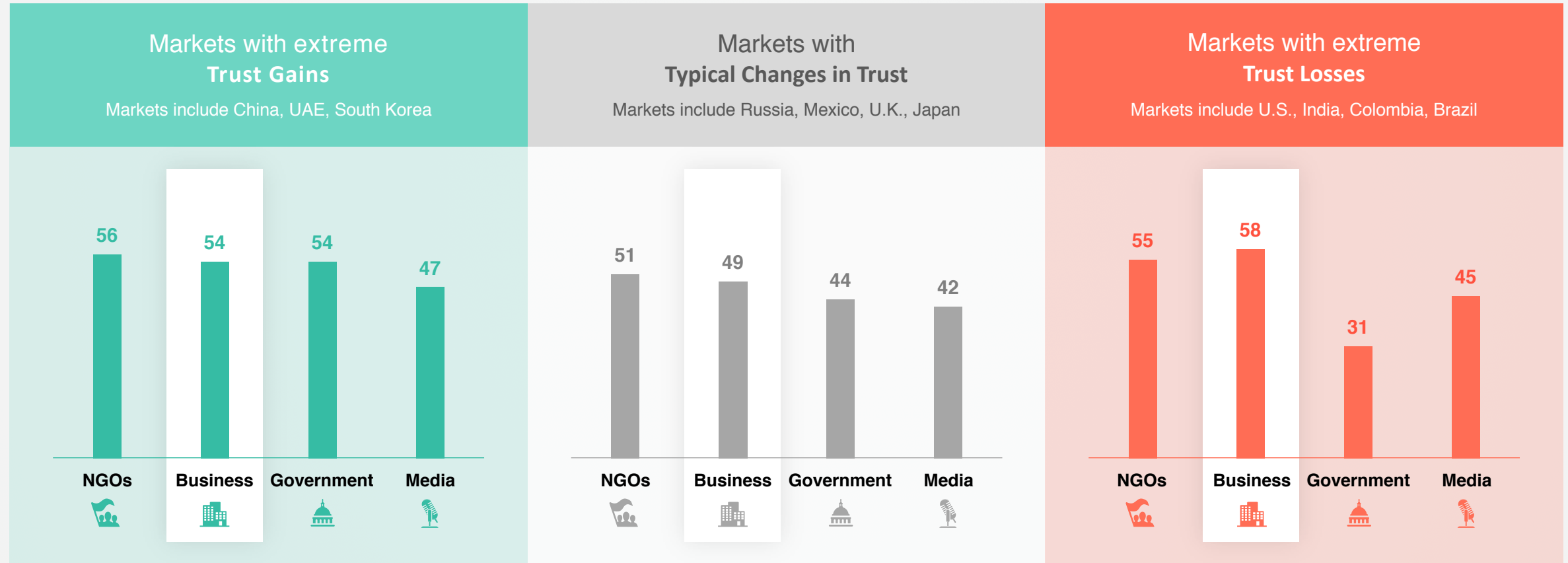
Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4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



Navigating a Polarized World

Where Trust Loss is Extreme, Business is the Retaining Wall

Percent trust in the four institutions, in countries with extreme and typical changes in trust



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). Trust Volatility Measure. The net year-over-year (2017-2018) percentage point change across the four institutions (TRU_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.

Where Trust Loss is Extreme, Employer Trust is Strongest

Percent trust in employer, in markets with extreme and typical changes in trust



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). Trust Volatility Measure. The net year-over-year (2017-2018) percentage point change across the four institutions (TRU_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.

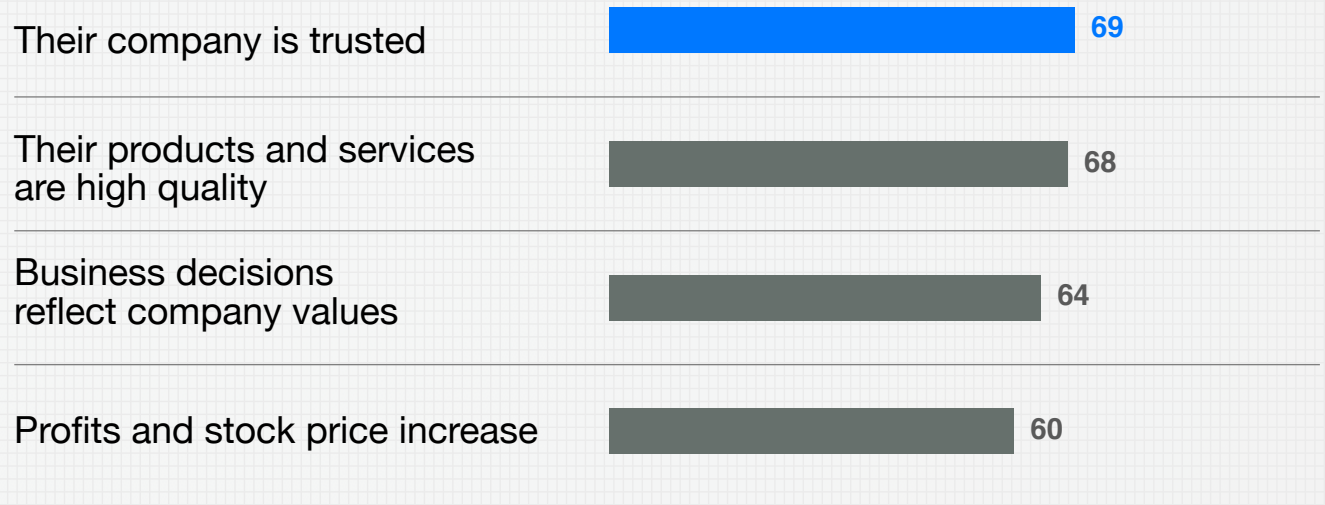
Business Is Expected to Lead

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

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 job one



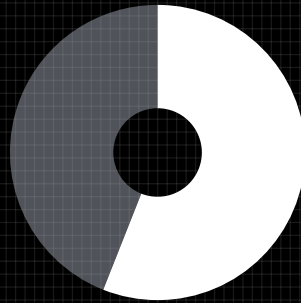
Source: 2018 Edelman Trust Barometer. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular market, 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, 28-market global total.

Navigating a Polarized World

- 1 Go beyond the 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

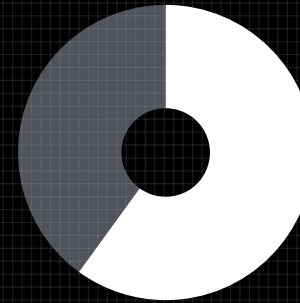
Business Must Show Commitment Beyond the Business

Percent who agree that...



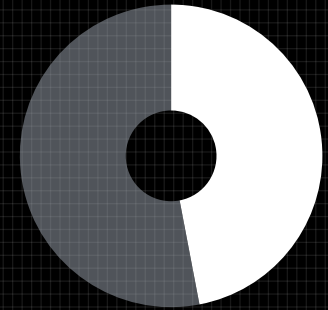
56%

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



60%

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



47%

CEOs are so focused on global issues that they overlook local and national matters

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. General population, 28-market global total.

2. LOCALIZE TRUST-BUILDING STRATEGIES

Business Must Address Market Dynamics

Trust-building mandates for business in markets with extreme or typical trust changes

Markets with extreme Trust Gains Markets include China, UAE, South Korea	Markets with Typical Changes in Trust Markets include Russia, Mexico, U.K., Japan	Markets with extreme Trust Losses Markets include U.S., India, Colombia, Brazil
Invest in Jobs	Invest in Jobs	Guard Information Quality
Consumer Safety	Ensure Equal Opportunity	Consumer Safety
Improve Quality of Life	Safeguard Privacy	Safeguard Privacy
Ensure Competitive Workforce	Drive Economic Prosperity	Drive Economic Prosperity
Innovate	Provide for Future Generations	Innovate

Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2017-2018) percentage point change across the four institutions (TRU_INS). General population, 28-market global total. Trust-building mandates for each institution. Mandates not shown in rank order. INS_EXP_BUS. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about business in general, how would you characterize each using the following three-point scale. General population, 28-market global total. For more details on the Trust Volatility Measure and Trust Mandates Analysis, please refer to the Technical Appendix.



**Silence is a
Tax on Truth**

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

Loss of Truth

I am not sure what is true and what is not

59%

Loss of Trust in Government Leaders

I do not know which politicians to trust

56%

Loss of Trust in Business

I don't know which companies or brands to trust

42%

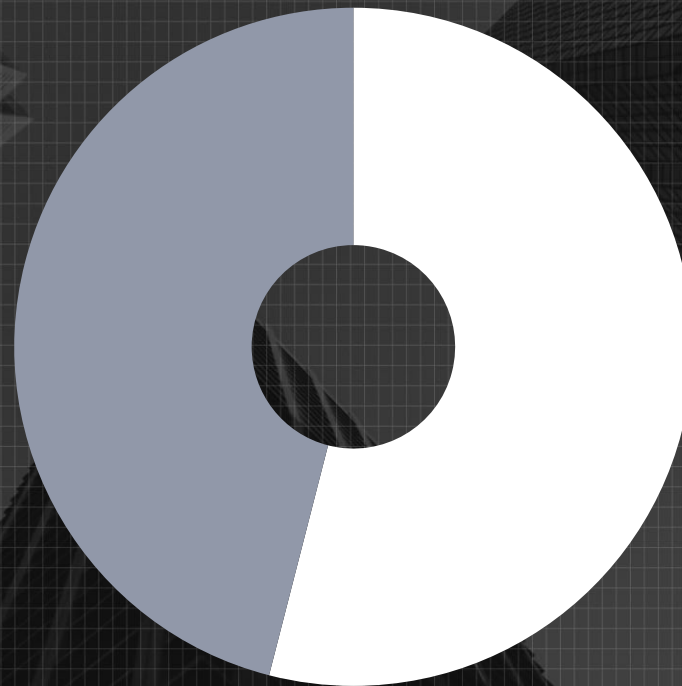
Source: 2018 Edelman Trust Barometer. MED_CON. What consequences are you experiencing as a direct result of the media not doing a good job fulfilling its responsibilities? Question asked of those 64% who answered codes 1-3 at MED_RSP. General population, 28-market global total.

3. SPEAK UP ON KEY ISSUES

Business Credibility on Issues is High

Which do you believe is giving you the truth?

An analysis of an important social issue by ...



54%

A major news organization

46%

A major corporation

Source: 2018 Edelman Trust Barometer. CEO_RFB. You are about to see a series of two choices. For each pair, we want you to choose the one that you are more likely to believe. Question asked of half of the sample. General Population, 28-market global total.

CEOs Seen as Authority on Issues and Policy

Percent who have a strong expectation that CEOs shape conversations and policy debates about each issue

84%

expect CEOs to inform conversations and policy debates on one or more issues

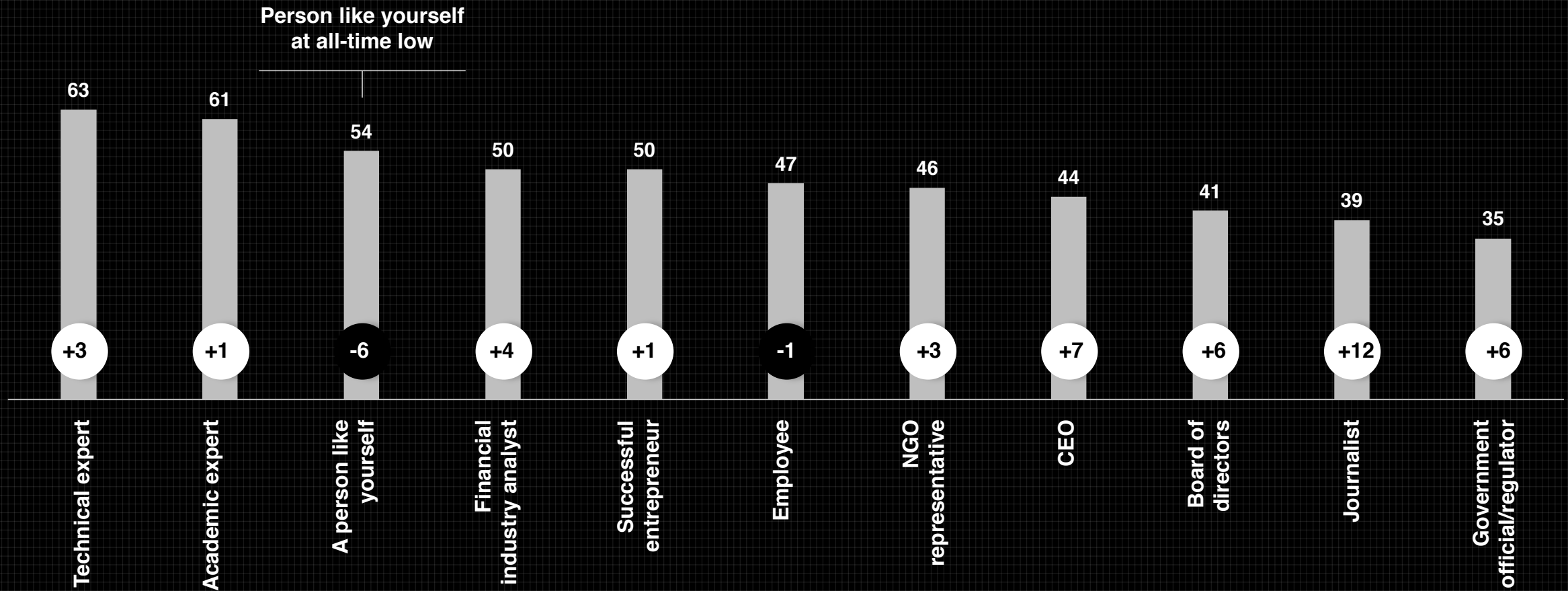
Global ranking

1	Jobs	8	Discrimination
2	The economy	9	Infrastructure
3	Automation	10	Cost of living
4	Regulations	11	Education
5	Globalization	12	Healthcare
6	Corruption	13	Immigration
7	Global warming		

Source: 2018 Edelman Trust Barometer. CEO_RSP. For each of the following topics, please indicate to what degree corporate CEOs should be held responsible for directly helping to inform and shape ongoing conversations and policy debates. (Some expectation, codes 4-5), question asked of half of the sample. General Population, 28-market global total.

Voices of Authority Regain Credibility

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



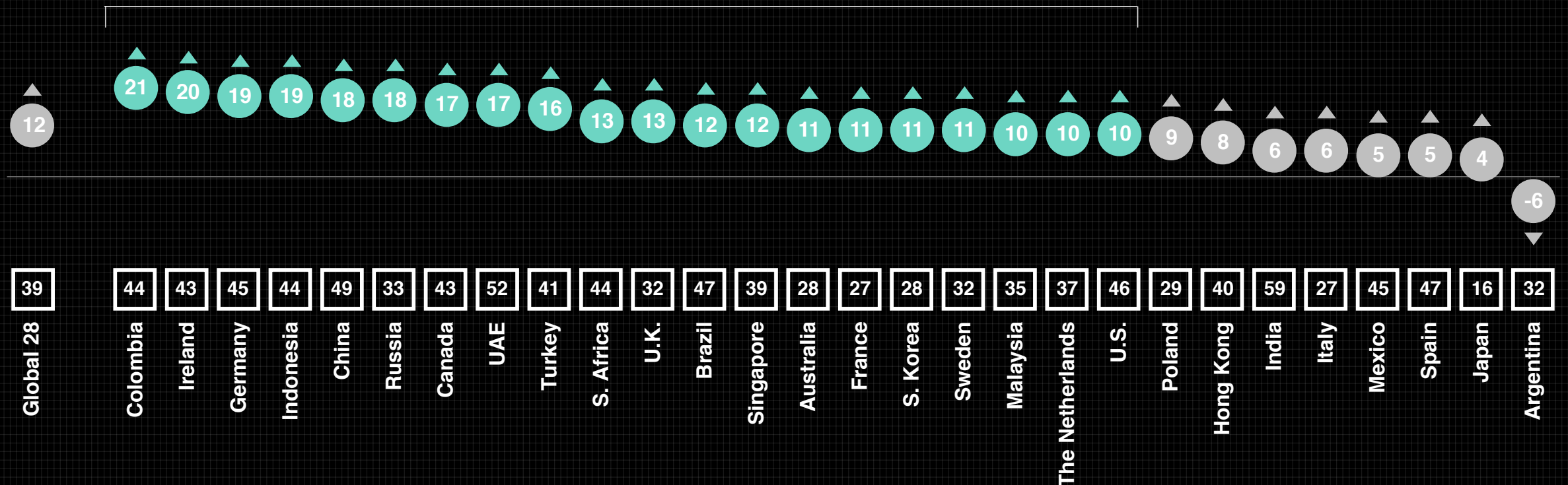
Source: 2018 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible), question asked of half of the sample. General population, 28-market global total.

Earned Media More Important than Ever

2018
journalist
credibility

Percentage point change from 2017 to 2018 in respondents who rate journalists as very/extremely credible, and percent who say journalists are credible

Double-digit increases in credibility of journalists in 20 of 28 countries

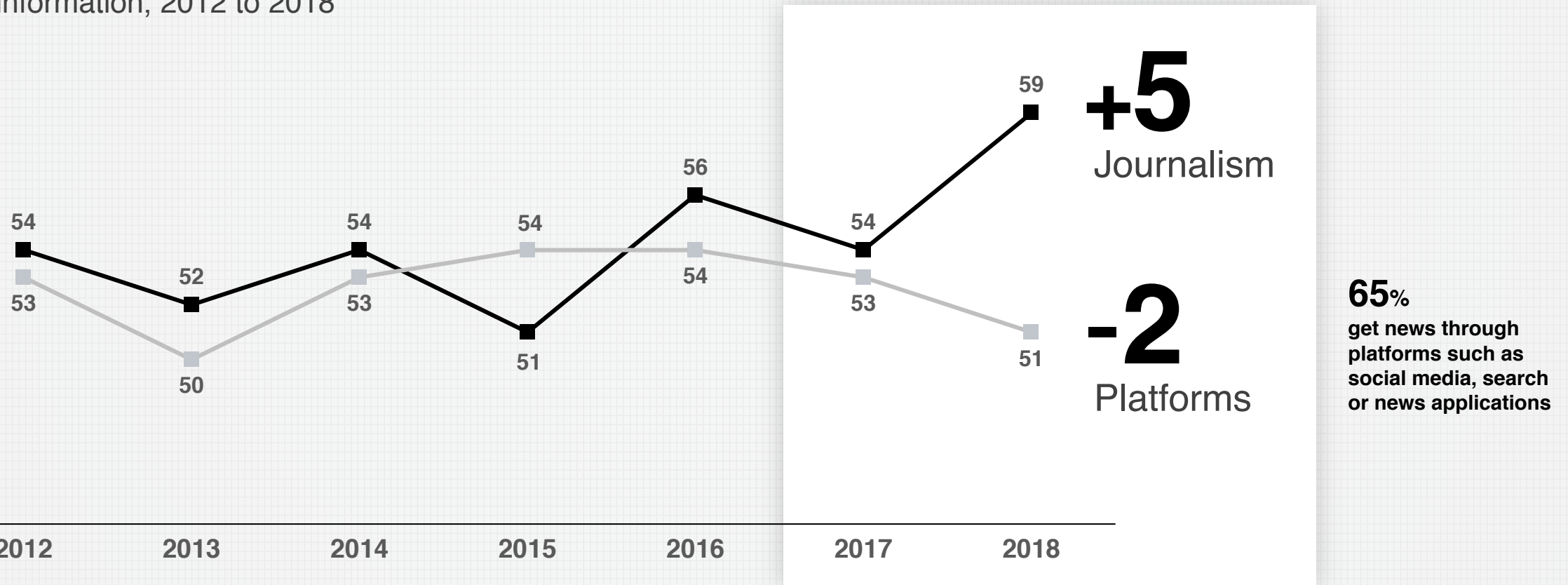


Source: 2018 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Credible), question asked of half of the sample. General Population, 28-market global total.

While Trust in Platforms Declines, Trust in Journalism Rebounds

Percent trust in each source for general news and information, 2012 to 2018

- Average trust in traditional and online-only media
- Average trust in search engines and social media platforms



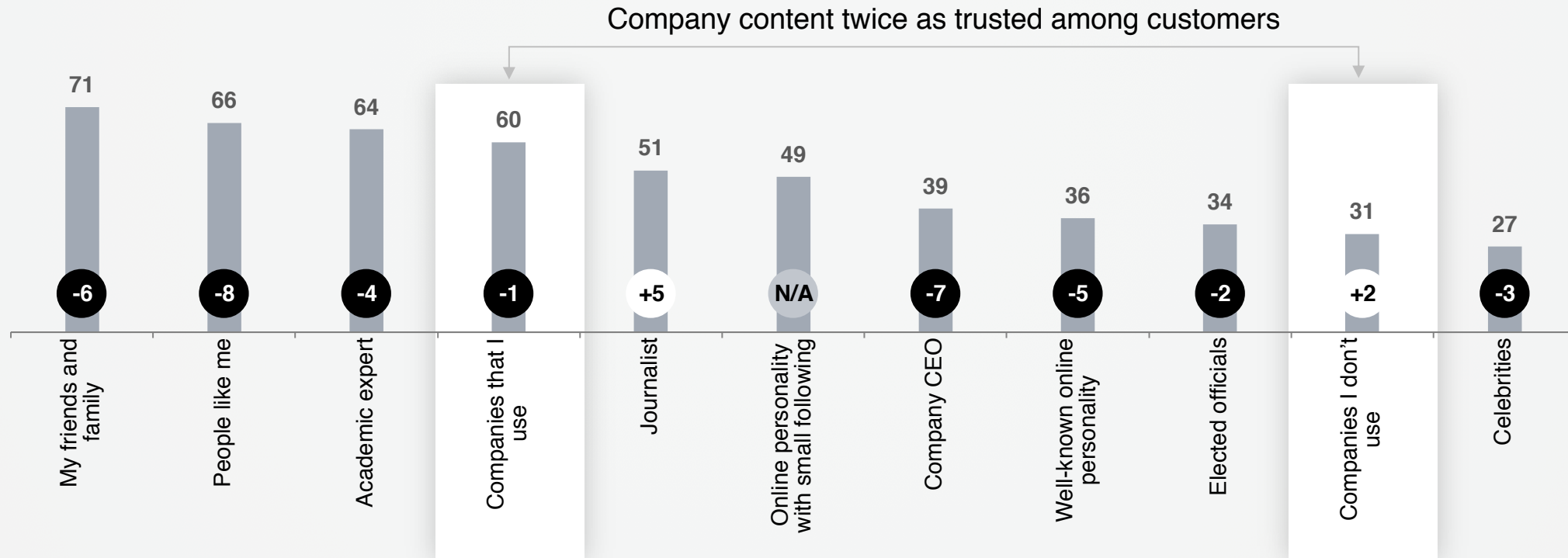
Source: 2018 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust), question asked of half of the sample. General population, 25-market global total. MED_NEW_CSP. How do you normally get your news? (callout is net of codes 2, 5 and 7), question asked of half of the sample. General population, 28-market global total. Journalism is an average of traditional media and online-only media. Platforms is an average of search engines and social media



The Opportunity to Inform and Engage

Company Content is Trusted (When You Have A Relationship)

Percent who trust information created by each author, 2017 vs. 2018



Source: 2018 Edelman Trust Barometer. COM_TAC. Thinking about the information you consume, how much do you trust the information from each of the following authors or content creators? (Top 4 Box, Trust), question asked of half of the sample. General Population, 28-market global total.

4. INFORM AND ENGAGE

Emulate Quality Journalism

Percent who rate each as true and important when describing their favorite media source

Rigorous

Engage in
high-quality journalism

62%

Clear

Present information in a simple
and easy-to-understand way

66%

Accessible

I can access it
anytime, anywhere

66%

Source: 2018 Edelman Trust Barometer. MED_SPF_SRC. Please indicate how important each of the following is in making this one of your favorite media sources using the 6-point scale below where zero means the statement is “not an accurate description of this media source”, one means the statement is “true of this media source, but it is not at all important in making this source one of my favorites” and five means the statement is “true and it is extremely important in making this source one of my favorites”. (Top 2 Box, True and Important), question asked of half of the sample. General Population, 28-market global total.

Present Content in Multiple Formats

Which do you believe is giving you the truth?

51%

Personal experiences

59%

Video

65%

Spontaneous speaker

57%

Detailed argument

49%

Data

41%

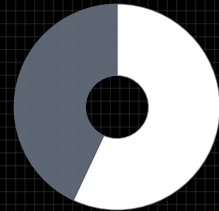
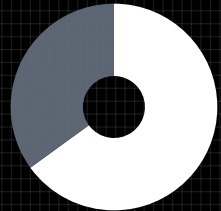
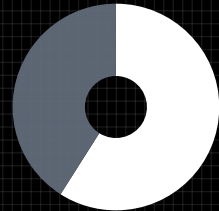
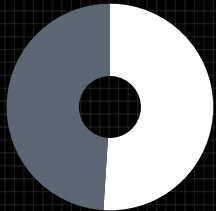
Words

35%

Rehearsed speaker

43%

Short and simple argument



Source: 2018 Edelman Trust Barometer. COM_RFB. You are about to see a series of two choices. For each pair, we want you to choose the one that you are more likely to believe. Choices shown to half of the sample. General Population, 28-market global total.

4. INFORM AND ENGAGE

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?

50%

The Disengaged

Consume news less than weekly

25%

Consumers

Consume news about weekly or more

25%

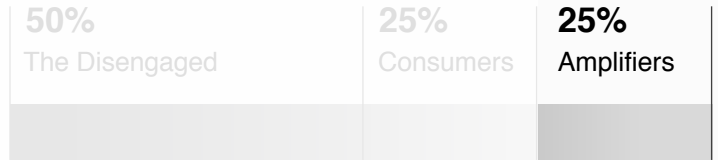
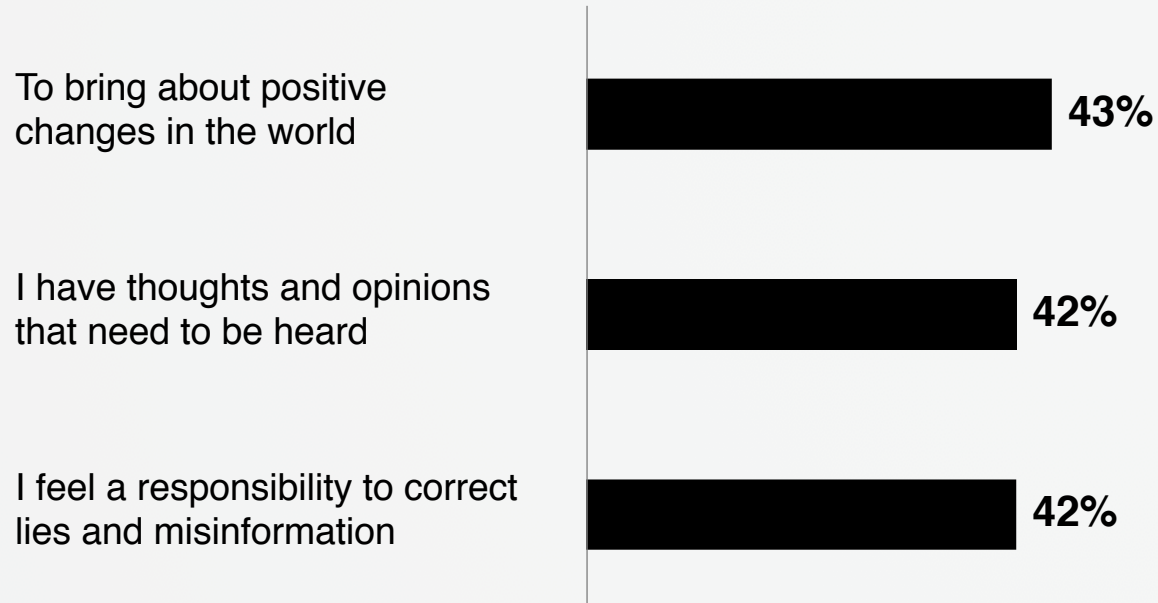
Amplifiers

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

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, 28-market global total. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

Engage Amplifiers as Advocates

Percent of Amplifiers who say they regularly share content for the following reasons



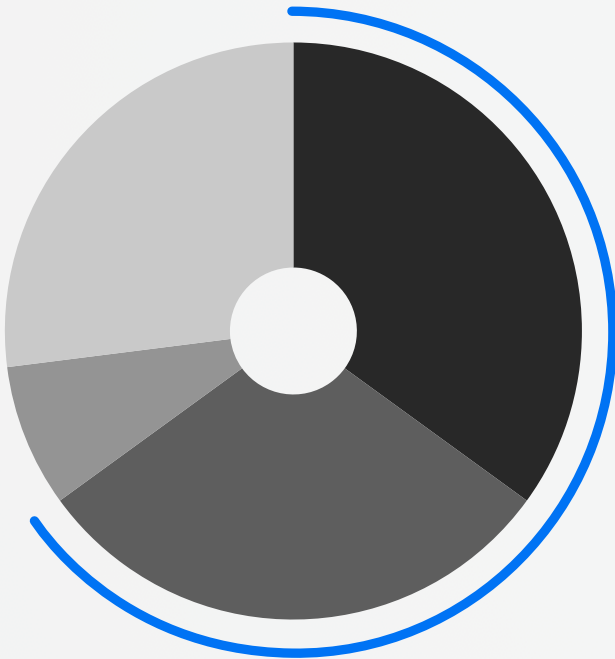
Amplifiers

Share your commitment to the truth

Source: 2018 Edelman Trust Barometer. MED_SEG_REG. Why do you regularly post your opinions or other content? Question only asked of those who selected codes 3-7 at MED_SEG_OFT. General population, 28-market global total, among Amplifiers. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

Use Peer Voices to Draw Attention

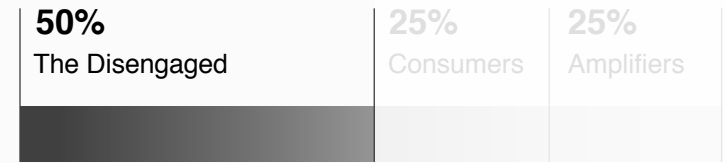
Percent who would check out a news story they were not automatically interested in after hearing about it from other people



65%

Will check out a news story after hearing about it **five times or less**

- 1-2 times 35%
- 3-5 times 30%
- 6 or more times 8%
- I would probably never check out the story if I was not already interested in it 27%



Among the Disengaged,

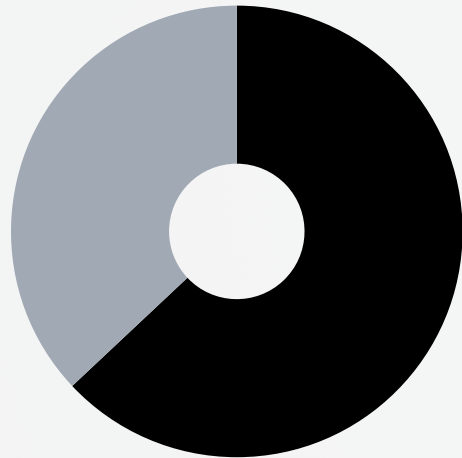
51%

Will check out a news story after hearing about it five times or less

Source: 2018 Edelman Trust Barometer. MED_SEG_TIM. In your experience, if there is a news story that you are not automatically interested in, how many times on average do you need to see or hear people you know talking about it before your curiosity or fear of missing out drives you to check the story out yourself? General population, 28-market global total and among the Disengaged. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

Engage in Conversation Across the Business

Which is more believable about a company?



63%

Company's
social media

37%

Company's
advertising

Percent who agree:

52%

CEOs

should regularly
communicate directly to the
public using social media

64%

Employees

should participate in
their company's social
media activities

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. Choices shown to 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. CEO_EMP_EXP. Below is a list of potential expectations that you might have for a company employee. Thinking about employees in general, how would you characterize each using the following five-point scale. (At least some expectation, codes 3-5), question asked of half of the sample. General Population, 28-market global total.

6. ACTIVATE THE ENTIRE ORGANIZATION

Give Employees a Voice

Percent who expect each of the following of employees

72% Trust their employer

Speak up if they see their company doing wrong

82%

Support their company's causes and community activities

80%


Pressure management to weigh in on social issues

61%

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). CEO_EMP_EXP. Below is a list of potential expectations that you might have for a company employee. Thinking about employees in general, how would you characterize each using the following five-point scale. (At least some expectation, codes 3-5), question asked of half of the sample. General Population, 28-market global total.

Navigating a Polarized World

- 1 Go beyond the 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



2018
Edelman Trust Barometer
Technical Appendix

2018 Edelman Trust Barometer

Table of Contents

Technical Appendix

1. **Why Edelman studies trust**
2. **Methodology**
3. **The sample**
4. **How we measured trust volatility**
5. **How we measured trust in journalism and in platforms**
6. **How we defined the news engagement segments**
7. **How we measured the trust-building mandates**
8. **The Edelman Trust Barometer 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 diminishes, 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 or defend 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.

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

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).

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

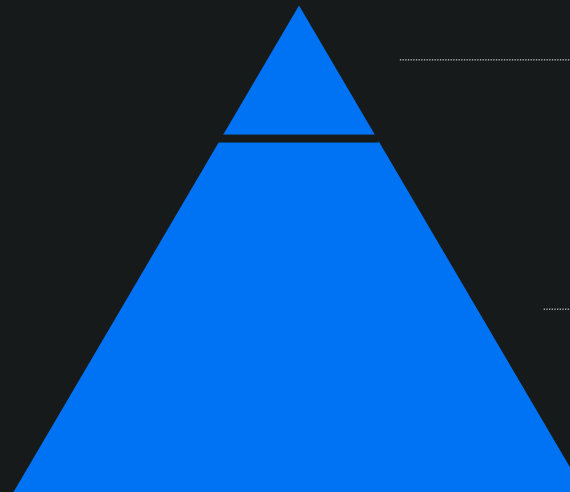
In top 25% of household income per age group in each market

Report significant media consumption and engagement in business news

Mass Population

All population not including informed public

Represents 85% of total global population



Methodology

Sample Size, Quotas and Margin of Error

	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 +/- 0.8% half sample	6,200	Age, Education, Gender, Income	+/- 1.2% total sample +/- 1.8% split sample
China and U.S.	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	500	Age, Education, Gender, Income	+/- 4.4% total sample +/- 6.2% split sample
All other markets	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	200	Age, Education, Gender, Income	+/- 6.9% total sample +/- 9.8% split sample

* Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.

** In the U.S., U.K. and UAE, there were additional quotas on ethnicity.

*** In the UAE, there were additional quotas on ethnicity.

Methodology

Languages and Internet Penetration by Market

The Edelman Trust Barometer is an online survey. In developed markets, a nationally- representative online sample closely mirrors the general population. In markets 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*		Languages	Internet Penetration*		Languages	Internet Penetration*
Global	-	50%	India	Hindi & English	34%	Singapore	English & Simplified Chinese	81%
Argentina	Localized Spanish	79%	Indonesia	Indonesian	50%	South Africa	English & Afrikaans	54%
Australia	English	88%	Ireland	English	94%	South Korea	Korean	93%
Brazil	Portuguese	66%	Italy	Italian	87%	Spain	Spanish	87%
Canada	English & French Canadian	90%	Japan	Japanese	94%	Sweden	Swedish & English	93%
China	Simplified Chinese	53%	Malaysia	Malay	79%	Turkey	Turkish	70%
Colombia	Localized Spanish	58%	Mexico	Localized Spanish	65%	UAE	Arabic & English	91%
France	French	87%	Netherlands	Dutch & English	95%	U.K.	English	95%
Germany	German	90%	Poland	Polish	73%	U.S.	English	88%
Hong Kong	English & Traditional Chinese	87%	Russia	Russian	76%			

*Data source: <http://www.internetworldstats.com/stats.htm> (June 30, 2017 Update)

Trust Volatility

How Did We Measure Trust Volatility?

In 2018, we analyzed the volatility of trust in social institutions. Specifically, we looked at volatility in trust in the institutions of government, media, business and NGOs.

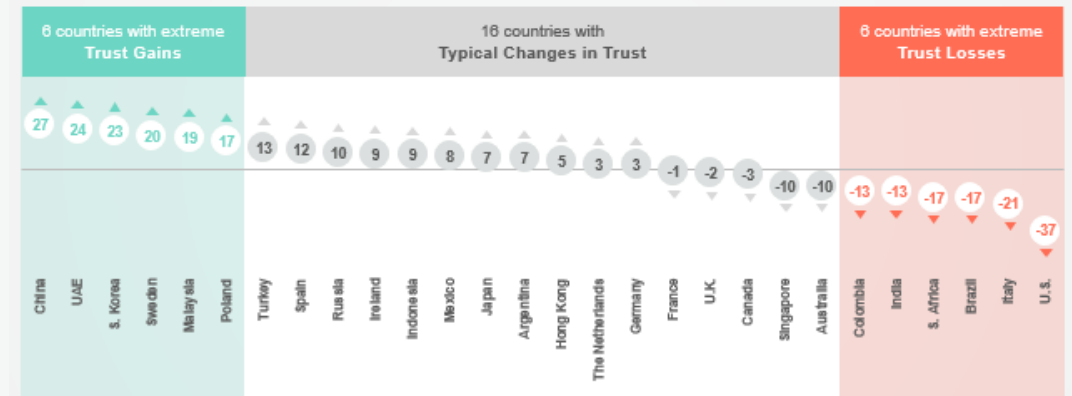
The volatility measure is the aggregate year-over-year change in trust for each of the four institutions at the market level. The individual trust changes (positive and negative) were summed across all four institutional entities to yield the aggregate trust volatility. This method reflects the net amount of change in either the positive or negative direction, rather than the absolute amount of change across the institutions (meaning a sum of both positive and negative numbers may cancel each other out).

For example, to measure institutional trust volatility in the U.S. in 2018, we calculated the percentage-point change in trust for each of the four main institutions from 2017 to 2018. This was done by subtracting the value in 2017 from the value in 2018, so that a decrease in trust was recorded as a negative number, and an increase in trust was recorded as a positive number. We then added these changes together across the four institutions, yielding a value of of -37. This shows that in the US, the four main institutions lost a combined 37 percentage points of trust from 2017 to 2018.

After calculating institutional volatility by market for every year from 2013-2018, we characterized greater-than-expected aggregate trust gains and losses. We looked at the volatility scores from all markets over the six-year period and identified the approximate lowest and highest 20 percent of scores (a combined 40 percent) as *noteworthy* changes in trust, while we characterized the approximate middle 60 percent of scores as *expected* trust changes. These groups of markets—those with extreme trust gains or losses, and those with typical trust changes—are shown on slide 9 of the global report. The image below is the volatility measure by market from 2017 to 2018.

The Polarization of Trust

Aggregate percentage point change in trust in the four institutions, and change from 2017 to 2018



News Sources

How Did We Measure Trust in Journalism vs. Platforms?

We measure multiple components of the media ecosystem within the Trust Barometer, including traditional media, online-only media, social media, and search engines. These components ladder up to define two components of today's media eco-system: journalism and platforms, as shown on page 19 of the global report .

“Journalism” is the professional creation of news content, and is represented by traditional media and online-only media. “Platforms” is how the content is delivered or discovered and is represented by social media and search engines.

Within the report, the journalism score is the average top four box percentage of trust in traditional and online-only media, as defined at right. The platform score is the average top four box percentage of trust in social media and search engines.

Trust in News Sources Scale Items

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”. (Please select one response for each.)

Journalism

Traditional Media: Mainstream media sources that are available in a print or broadcast format, such as newspapers, magazines, television news and radio news

Online-only Media: Online news sites and widely-followed blogs that report on top news stories, these do not have an offline version

Platforms

Social Media: 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)

Search Engines: Such as Google, Yahoo!, Bing or Baidu

News Engagement Segments

How Did We Define the News Engagement Segments?

The three news engagement segments shown on slide 22 of the global report (The Disengaged, Consumers, and Amplifiers) were defined based on two scales.

The first scale measured news consumption and the second measured sharing and posting of news content. Both scales were based on an average of two activities, rated on a seven-point scale of how often the respondent engaged in the activities. We used both scales together to determine three levels of overall news engagement.

We discovered that those who scored high on the posting/sharing scale were very unlikely to score low on the consumption scale, and those who scored low on the consumption scale were very unlikely to score high on the sharing/posting scale. As a result, despite there being four possible high/low combinations of the two scales, we chose to segment respondents into only three groups as defined below.

	Consumption	Sharing and Posting
The Disengaged	Less than weekly	Less than several times a month
Consumers	About weekly or more	Less than several times a month
Amplifiers	About weekly or more	Several times a month or more

News Consumption Scale Items:

Read, view or listen to news and information produced by major news organizations or publications at the original source

Read news and information from major news organizations sent to me by others or pushed to me on a news feed, social network platform or application

News Content Sharing/Posting Scale Items:

Share or forward news items that I find to be interesting

Create and post my own opinions or other news/information content on social media platforms or other online sites

Activity frequency scale response options:

I never do this

I occasionally do this

I do this several times a month

I do this weekly

I do this several times a week

I do this daily

I do this several times a day

News Engagement Segments

The News Engagement Segments by Market

	General Population	Informed Public																												
			Argentina	Australia	Brazil	Canada	China	Colombia	France	Germany	Hong Kong	India	Indonesia	Ireland	Italy	Japan	Malaysia	Mexico	Poland	Russia	Singapore	S. Africa	S. Korea	Spain	Sweden	The Netherlands	Turkey	UAE	U.K.	U.S.
The Disengaged	50	34	46	60	39	54	26	38	61	67	40	35	45	52	54	72	45	47	55	47	49	48	60	46	55	53	31	44	59	55
Consumers	25	31	26	28	23	31	28	28	23	15	31	19	17	32	19	18	19	19	23	32	30	24	18	26	31	34	23	18	25	26
Amplifiers	25	35	29	12	38	16	47	34	17	18	29	46	38	16	27	10	36	34	23	21	21	27	22	28	14	14	45	38	16	20

The Trust-Building Mandates

1. How We Identified the Mandates And Their Performance

This year we asked a series of questions designed to identify the trust-building mandates for each institution--the link between the role each institution is expected to play, its performance against that role, and the trust in that institution.

First, we established the role of each institution (its mandates), how well the institutions were performing against those mandates, and if there is a relationship between performance and trust.

We asked respondents to identify the responsibilities they felt were in the particular domain of each institution (NGOs, business, government and media). For those responsibilities rated as among the most important (“mandates”), respondents were also asked to evaluate the performance of the institution against that mandate.

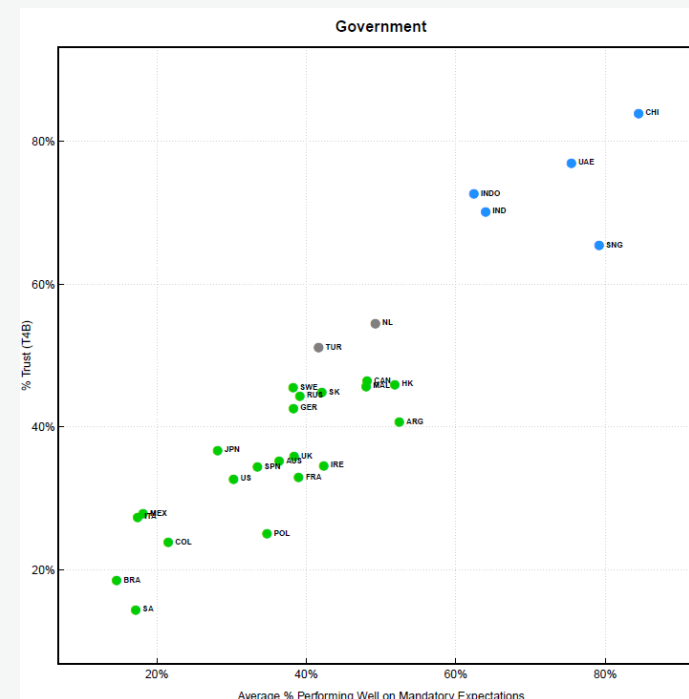
Globally, respondents identified an average of 10 mandates for each institution, and there was large variation in the mandates among respondents, even from within the same market. Thus, an institution’s overall performance must first be evaluated at a respondent level, rather than as market averages.

To measure this, we averaged the performance scores of all the mandates for each respondent. Then, we calculated the percent of respondents within each market who, on average, believe that the institution in question is performing better than mediocre across the mandates identified by that respondent.

Demonstrating the link to trust.

To highlight the relationship between performance against mandates and trust, we plot the percent of people who believe an institution is performing well against its mandates by the percent trust in that institution for each of the 28 markets.

The graph below demonstrates a strong, linear relationship between trust and performance against the trust-building mandates for government. A similar relationship was found for all four of the institutions.



The Trust-Building Mandates

The Questions and Full List of Mandates

Respondents were given a list of 26 potential societal roles, and asked how much of a responsibility each of the four institutions had in fulfilling that role. The questions we used and the full list of choices are shown below and at right.

Responsibility Characterization Question

Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about **[insert institution]** in general, how would you characterize each using the following three-point scale.

1. **[Insert institution]** has no direct responsibility for this
2. This is something that **[insert institution]** should help with or contribute to, but it is not one of its primary responsibilities to society
3. This is one of the most important responsibilities that **[insert institution]** has as an institution
4. Don't know

Performance Against Mandates Question

How well do you feel **[insert institution]** is currently meeting this obligation to society? Please indicate your answer using the 5-point scale below.

1. **[Insert institution]** is failing at this
2. **[Insert institution]** is doing poorly on this
3. **[Insert institution]** is doing mediocre on this
4. **[Insert institution]** is doing this well
5. **[Insert institution]** is doing this very well
6. Don't know

Guardian of Fairness and Equity	1	Ensure everyone has equal opportunities
	2	Prevent discrimination
	3	Protect ordinary people from abuses of power
Foster Prosperity	4	Drive economic prosperity
	5	Foster innovation and scientific advancement
	6	Ensure workers have globally competitive skills
	7	Improve our quality of life
Take Care of People	8	Ensure the poorest have the basic minimum
	9	Provide good job opportunities
	10	Prevent bad health choices
	11	Provide for future generations
	12	Entertain and amuse
	13	Build infrastructure
	14	Provide social services
	15	Keep people safe from physical harm
	16	Protect privacy and personal information
	Educate	17
18		Supply information for good life decisions
19		Educate people on important issues
Check & Balance Other Institutions	20	Check and balance other institutions
	21	Be the guardian of information quality
	22	Investigate corruption and wrongdoing
	23	Support political leaders
Protect Tradition	24	Guard the values that make this country great
	25	Preserve our unique cultural traditions
	26	Create a sense of community

The Trust-Building Mandates

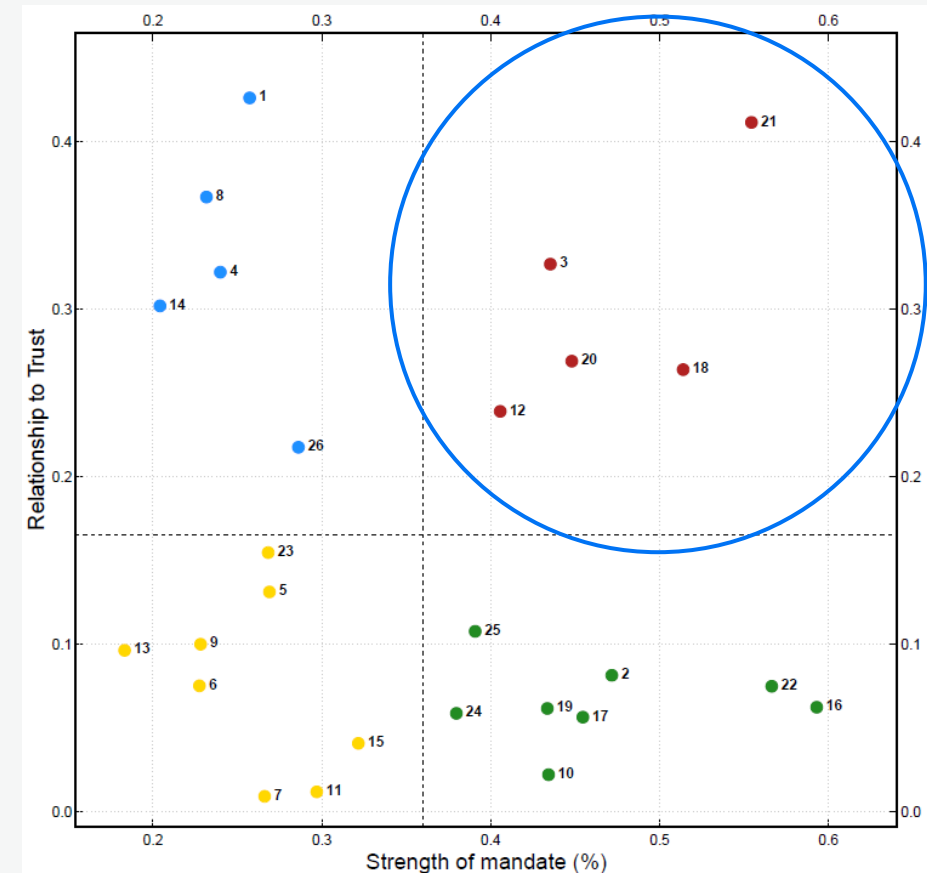
2. How We Prioritized the Trust-Building Mandates

The next step was to establish a hierarchy within the mandates, as different institutions have different societal roles, which may also vary by market. To prioritize the most important mandates for an institution to focus on, we analyzed the differences in the mandates' performance ratings between *trusters* and *distrusters* of that institution. We used a Linear Discriminate Analysis (LDA) to identify which mandates had the largest differences in performance ratings between *trusters* and *distrusters*. The LDA coefficients allow us to compare the relative contribution of each mandate to the overall separation between the trusters' and distrusters' responses to the performance question.

The inference we're making is that mandates with larger differences in performance ratings between trusters and distrusters have a more direct relationship to trust; the larger the LDA coefficient, the stronger the relationship to trust. If an institution prioritizes these mandates, it can maximize its trust building effect with stakeholders—specifically the distrusters who believe that institution could improve on those specific mandates.

We used both the LDA results and the percent of respondents who said each item was mandatory to prioritize the institutional responsibilities based on the strength of each mandate's relationship to trust. This blended method leverages both the order of what respondents *said* were the most important mandates, and the *strength* of each mandate's relationship to trust determined by the LDA.

To visualize this, we plotted each mandate's LDA coefficient (y-axis) by the percent of respondents who said it was a mandatory expectation (x-axis), for each institution. We then separated the plot into quadrants using the mean of each data series as quadrant boundary values, and assigned priority levels to each quadrant.



Trust-building mandates have the strongest relationship to trust, and an above-average percent of respondents who believe it is very important for the institution to play that role.

The Edelman Trust Barometer Research Team



Tonia E. Ries
Intellectual Property

Tonia is Global Executive Director, Intellectual Property, a role that includes stewardship of the Trust Barometer, the Earned Brand research into consumer relationships with brands, and the development of new thought leadership initiatives.

She leads the firm's global knowledge agenda across practices, geographies and clients, and acts as a catalyst for new thinking and discourse on business in a multi-stakeholder society.

Tonia is a graduate of Columbia University and has more than 25 years of experience in marketing, research, strategy, conferences, and media.



David M. Bersoff, Ph.D.
Edelman Intelligence

David leads global thought leadership research at Edelman Intelligence, a world-class research and analytics consultancy.

In this capacity, he is responsible for questionnaire development, enhancing our methodological rigor, leading data analysis and insight-development activities, and developing new frameworks for understanding trust, credibility and consumer-brand relationships.

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

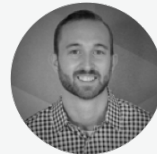


Sarah Adkins
Edelman Intelligence

Sarah leads the operations side of all thought leadership projects for Edelman Intelligence, a role she has held for five years.

Prior to joining Edelman, Sarah spent eight years at Nielsen designing surveys, 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.



Cody Armstrong
Edelman Intelligence

Cody manages the day-to-day operations of Edelman IP research. He has six years experience in the market research industry, with more than three of them spent on the IP research team. Cody's background includes secondary research, where he conducted media analysis for clients across several industries.

Cody holds a B.A. in Sociology from the University at Albany, where he also dual minored in Psychology and Business.



Jamis Bruening
Edelman Intelligence

Jamis manages data management, processing, and analysis. An environmental scientist by training, Jamis joined EI with several years of research in an academic setting, where he studied climate dynamics and global environmental change.

Jamis holds a M.S. in Environmental Science from Western Washington University, and previously graduated from Colgate University where he studied physics and geography.