



# 2018 Edelman Trust Barometer

New Zealand Report

#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

### Survey in New Zealand

3 years of data

1,000+ respondents total

New Zealand fieldwork was conducted in 11<sup>th</sup>-21<sup>st</sup> November, 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), New Zealand +/- 4.4 (N=1,150).

## General Online Population

7 years in 25+ countries

Ages 18+

1,150 respondents per country

1,150 respondents in New Zealand

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 global study countries

158 in New Zealand

Must meet 4 criteria:

Ages 25-64

College educated

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

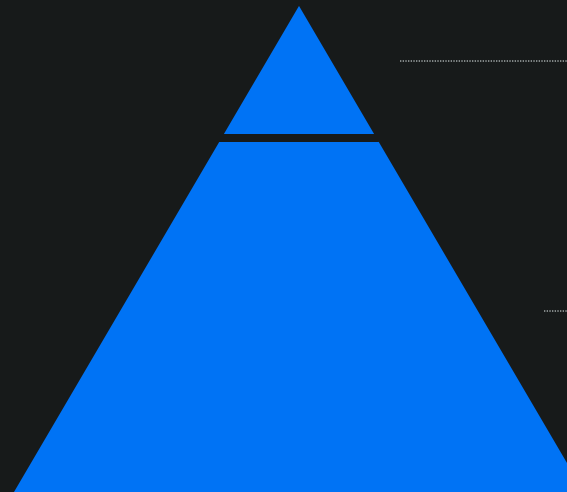
Report significant media consumption and engagement in business news

## Mass Population

All population not including informed public

Represents 85% of total global population

1,065 in New Zealand



# Trust in Retrospect

<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	"A Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young Influencers Have More Trust in Business	Business Must Partner with Government to Regain Trust

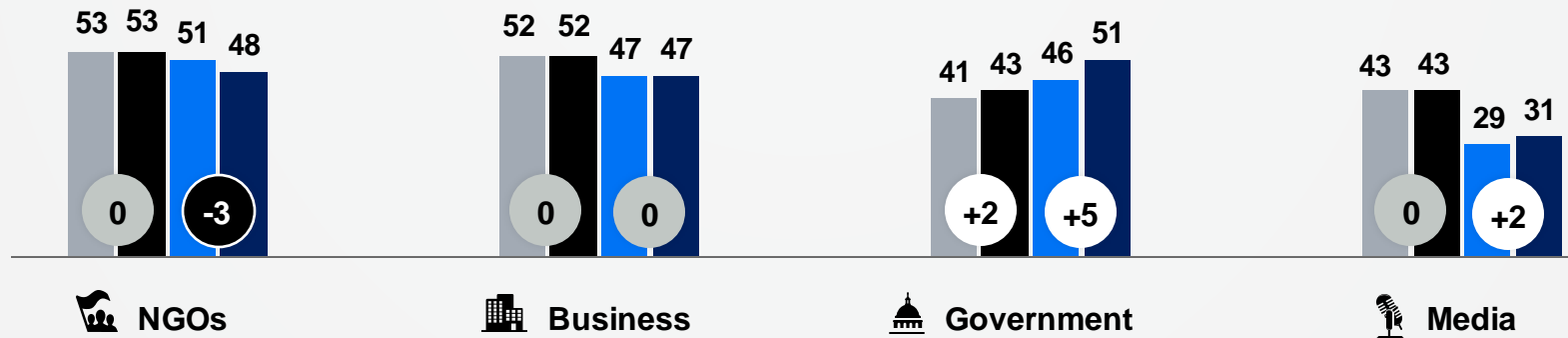
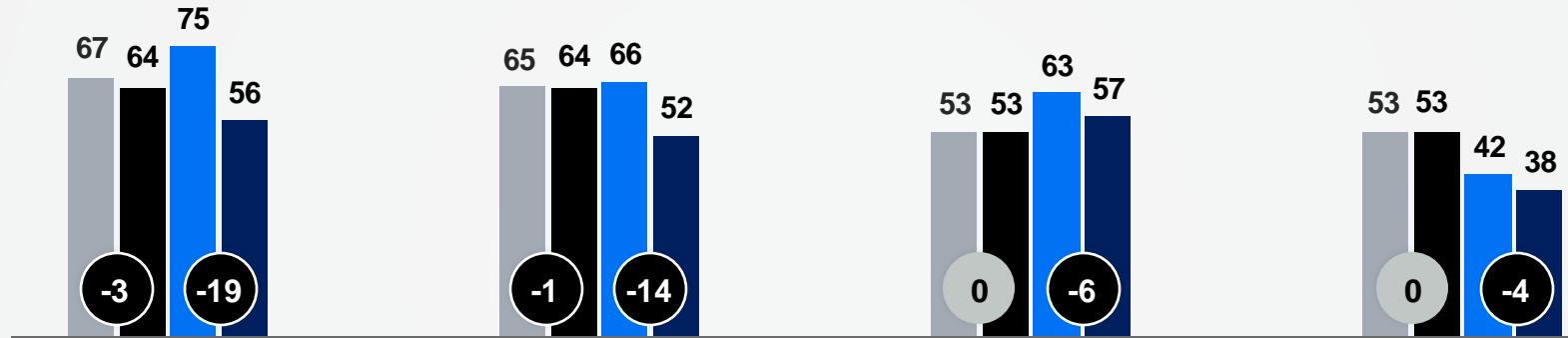
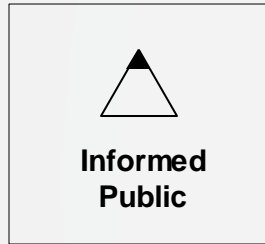
<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
Trust is Now an Essential Line of Business	Rise of Authority Figures	Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	<b>The Battle for Truth</b>



# A Polarization of Trust

# No Recovery in Trust Globally, Increase in Government Trust in New Zealand

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, New Zealand General Population (n=1,150).

# Trust Index A World of Distrust

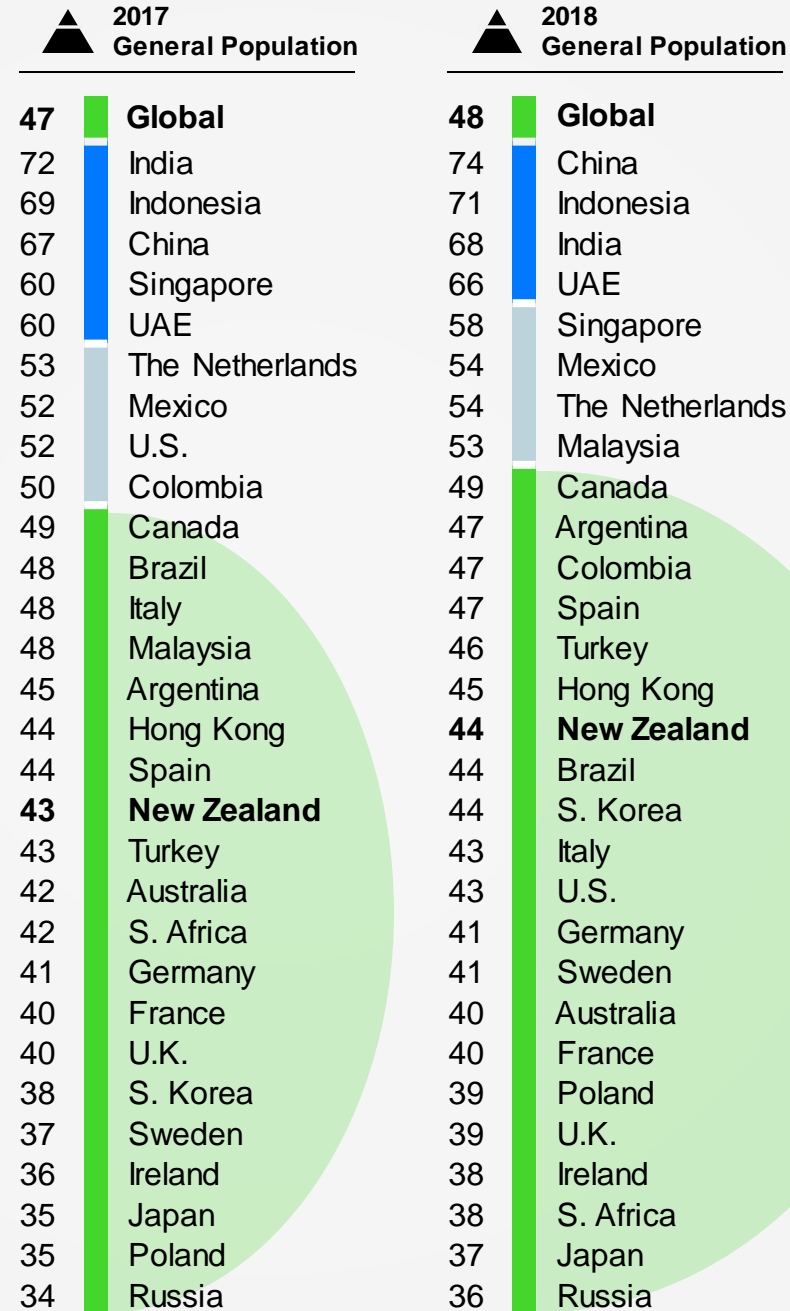
Average trust in institutions,  
general population, 2017 vs. 2018

Global Trust Index remains at distruster level

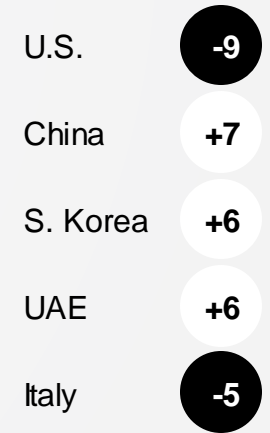
20 of 28 countries are distrusters, up 1 from 2017

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, New Zealand General Population (n=1,150).

Global totals exclude New Zealand figures.



## 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. General population, 28-country global total, New Zealand Informed Public (n=158).

Global totals exclude New Zealand figures.



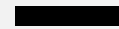


# A World Moving Apart

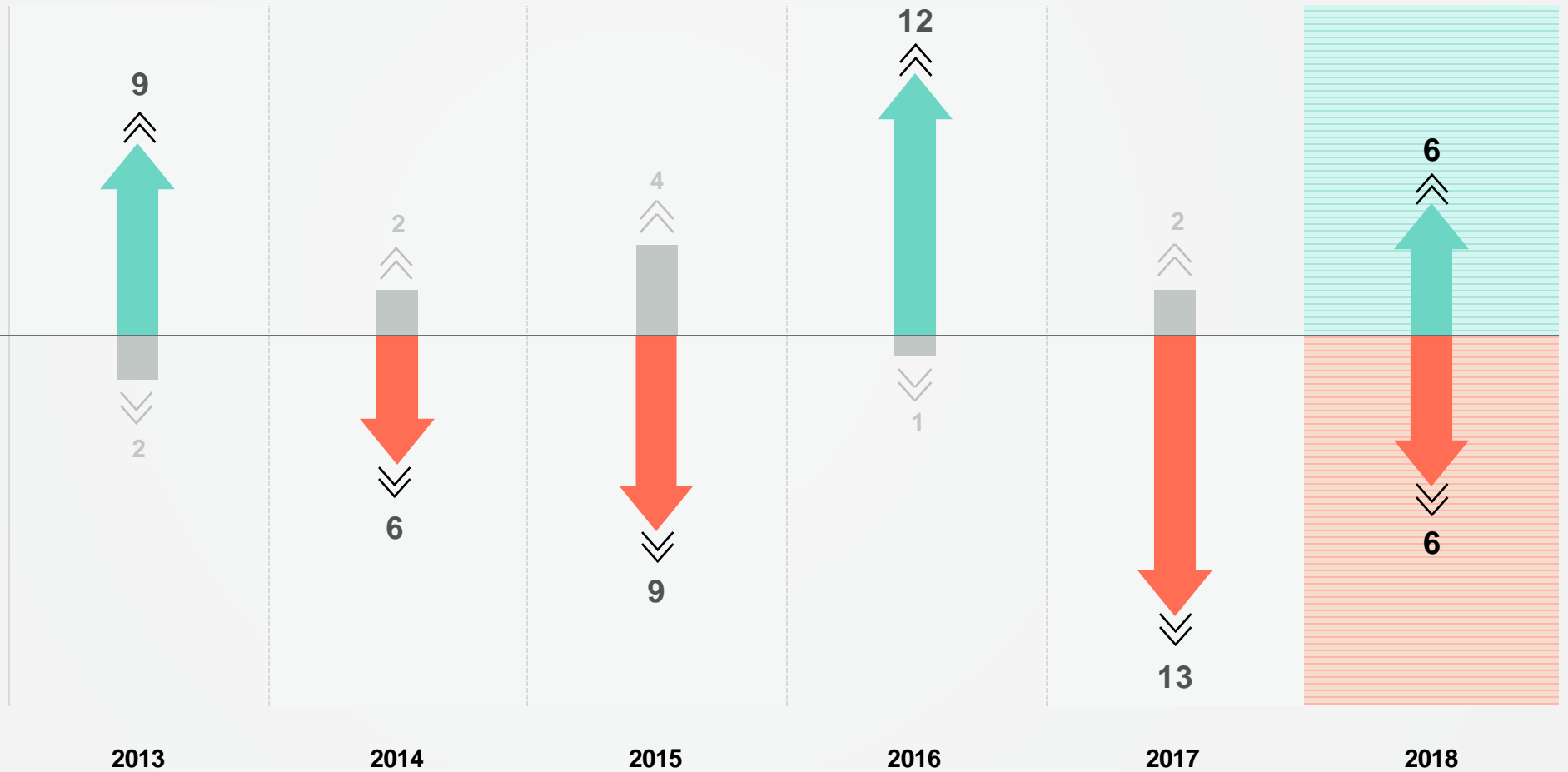
Number of countries with extreme changes in their aggregate trust in the four institutions, 2013 to 2018



# of countries with extreme **Trust Gains**



# of countries with extreme **Trust Losses**



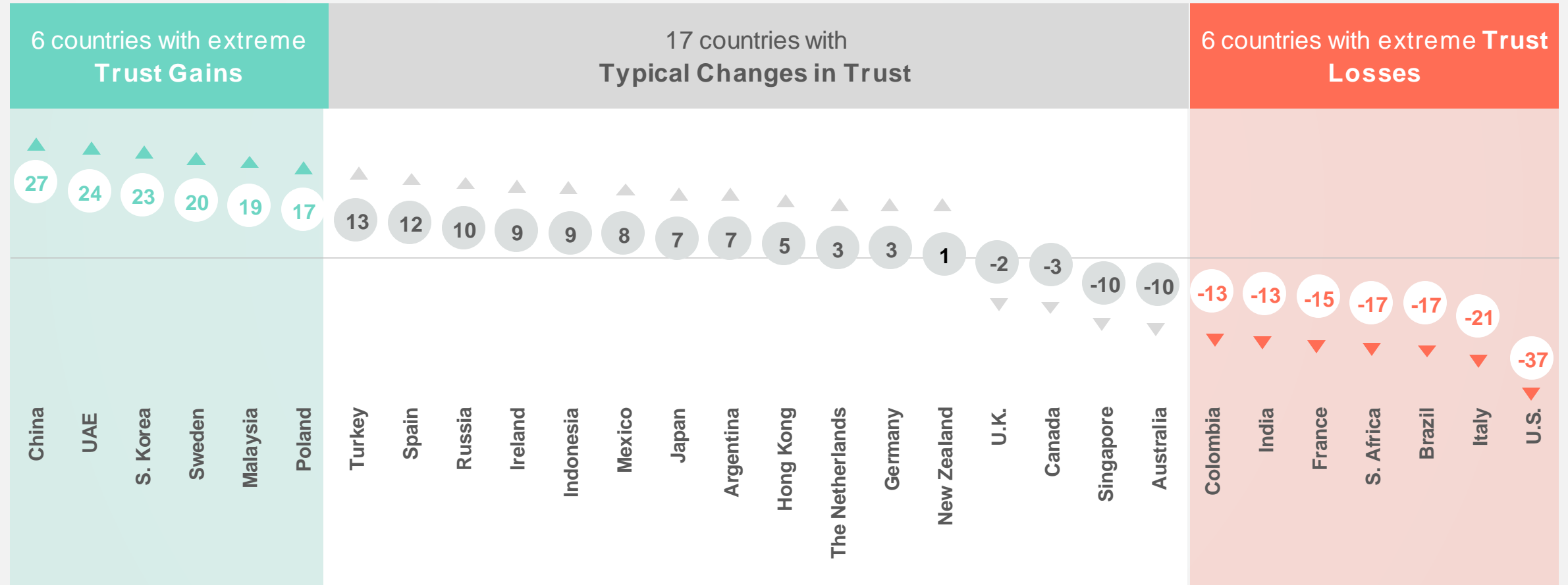
Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2013-2018) percentage point change across the four institutions (TRU\_INS). General population, 28-country global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical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

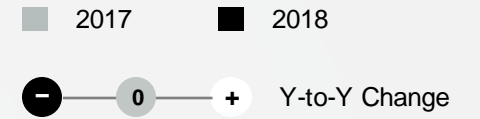


# Global Leaders Poles Apart



# Trust Crash in U.S.

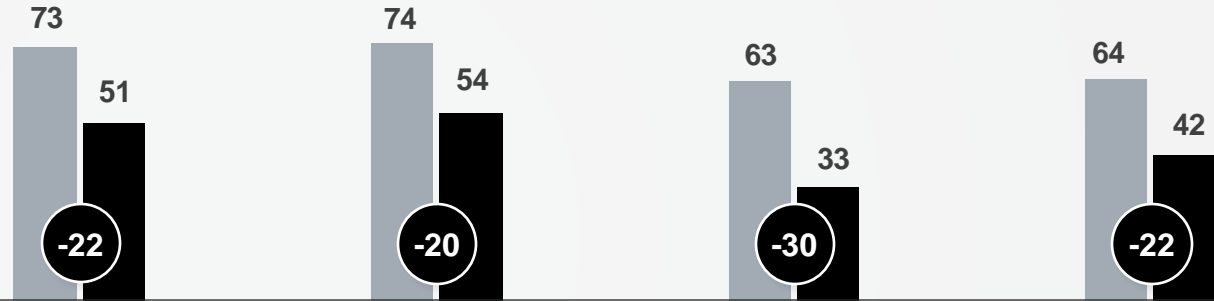
Percent trust in each institution, and change from 2017 to 2018



**45**  
TRUST INDEX

## ▲ Informed Public

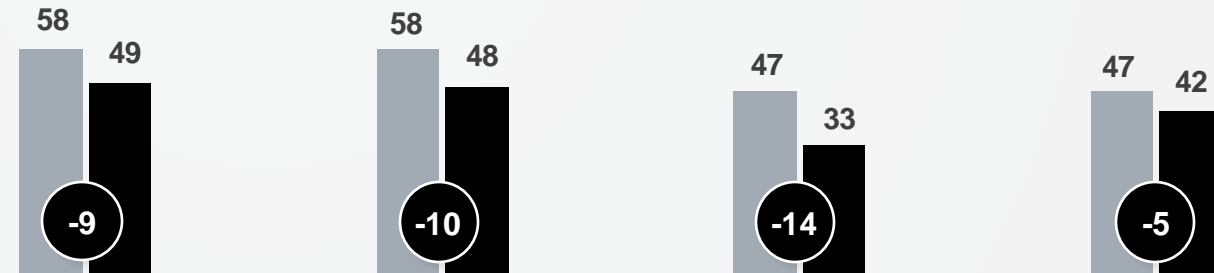
23-point decrease  
Fell from 6<sup>th</sup> to last place



**43**  
TRUST INDEX

## ▲ General Population

9-point decrease  
Fell from 8<sup>th</sup> to 18<sup>th</sup> place



NGOs



Business



Government



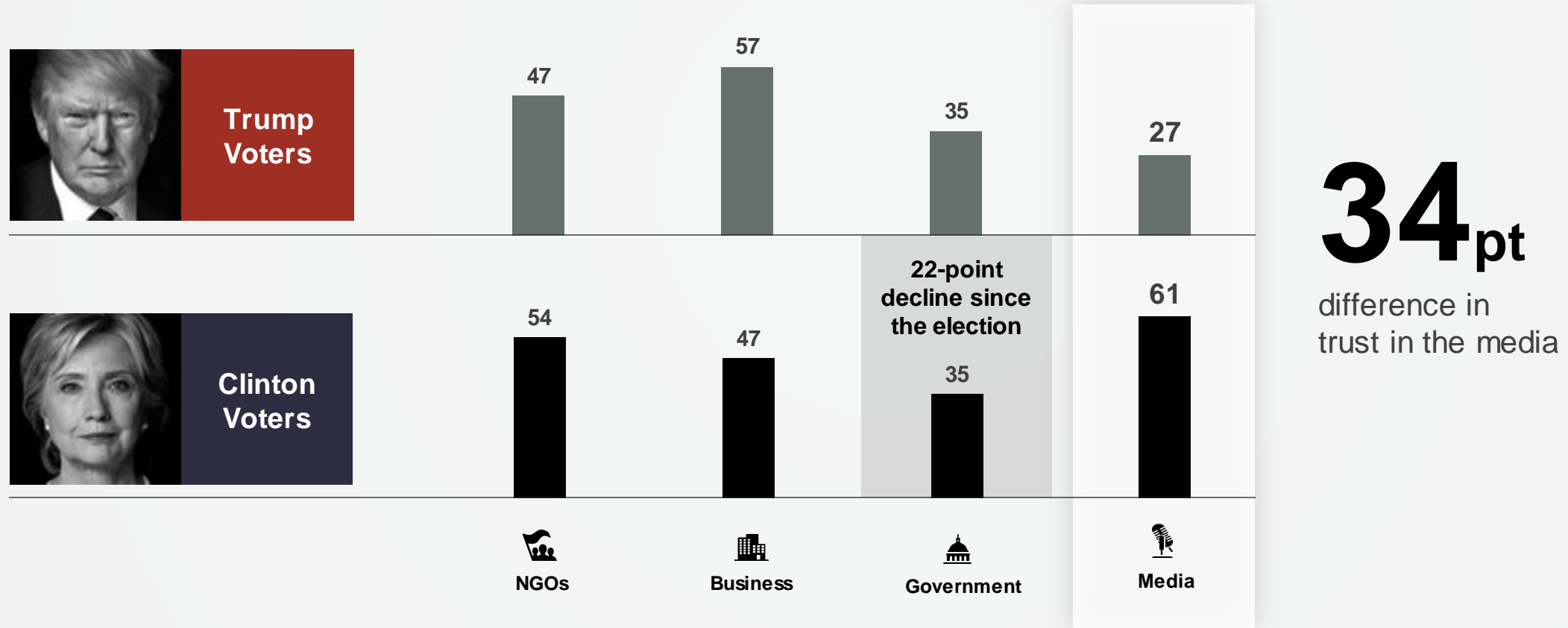
Media

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.



# U.S. Trust in Media Diverges Along Voting Lines

Percent trust in each institution, Trump vs. Clinton voters



Source: 2018 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) S11. For whom did you vote for in the last Presidential election? General population, U.S., among Trump (n=373) and Clinton (n=502) voters.



# China Rising

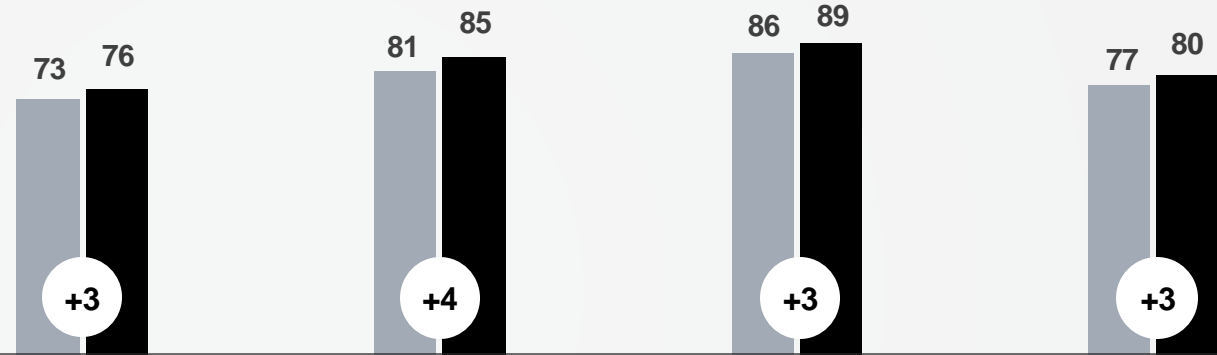
Percent trust in each institution, and change from 2017 to 2018



**83**  
TRUST INDEX

## ▲ Informed Public

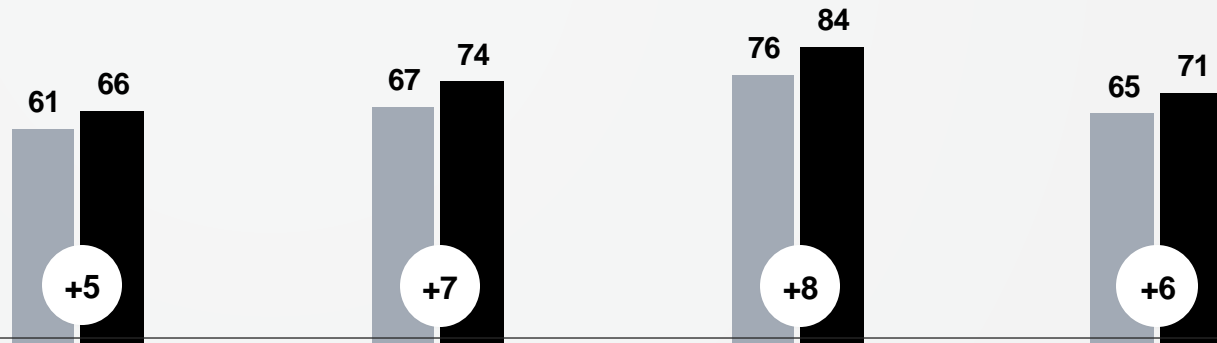
4-point increase  
Rose from 2<sup>nd</sup> to 1<sup>st</sup> place



**74**  
TRUST INDEX

## ▲ General Population

7-point increase  
Rose from 3<sup>rd</sup> place to 1<sup>st</sup> place



NGOs



Business



Government

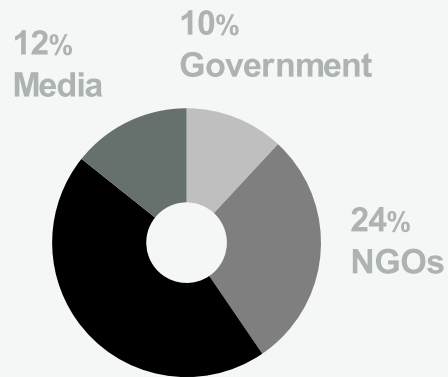


Media

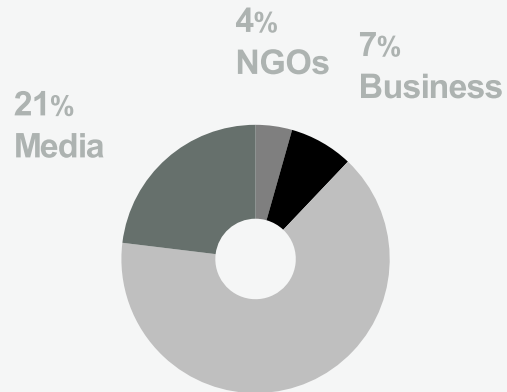
Source: 2018 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 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 Most Broken in the U.S.

Which institution is the most broken?



**38%**  
Business 🏢



**59%**  
Government 🏛️

# Government Path to Better Future in China

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



**Government 68%**

NGOs 8%

Business 9%

Media 7%

Government 15%

**NGOs 29%**

Business 22%


Media 8%

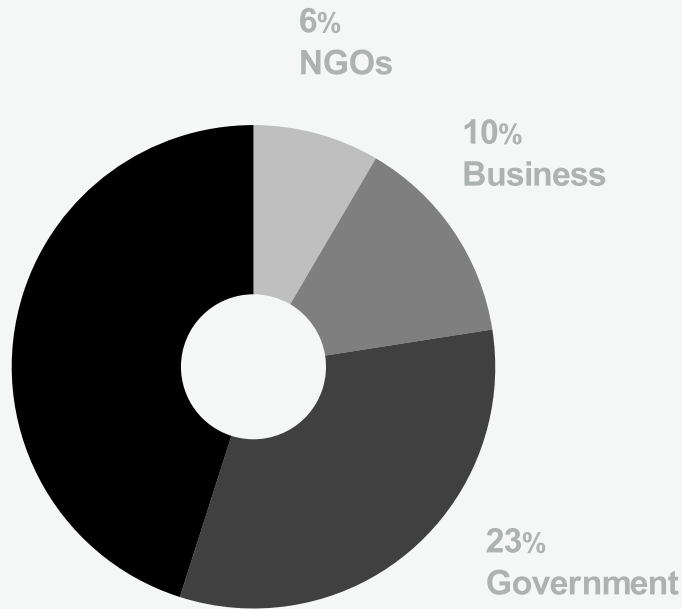
Source: 2018 Edelman Trust Barometer. ATT\_STE. Please indicate which institution – Government, Media, Business or NGO's – is best described by each of the following statements? General population, U.S. and China.

# Media Most Broken in New Zealand

Which institution is the most broken?

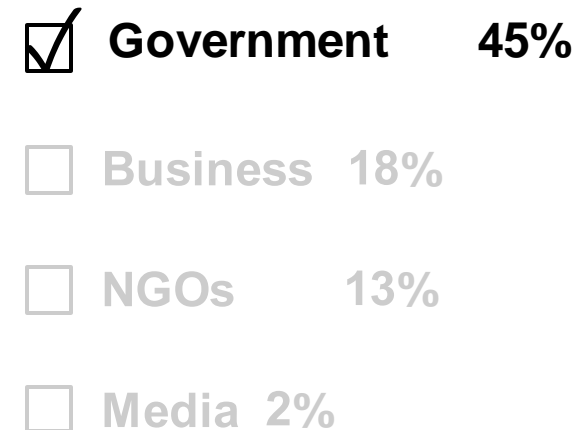


**32%**  
Media 



# Government Path to Better Future in New Zealand

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, U.S. and China, New Zealand General Population (n=1,150).

NB: Charts exclude "Don't know" answer option.

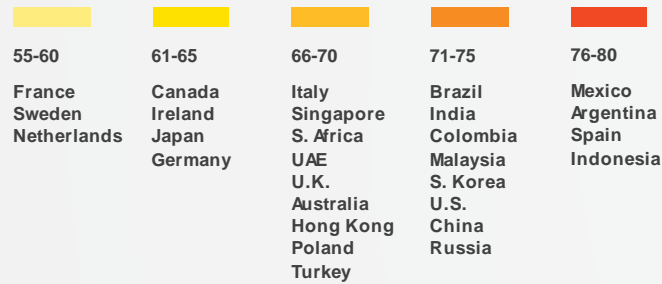


# In Search of Truth



# World Worried About Fake News as a Weapon

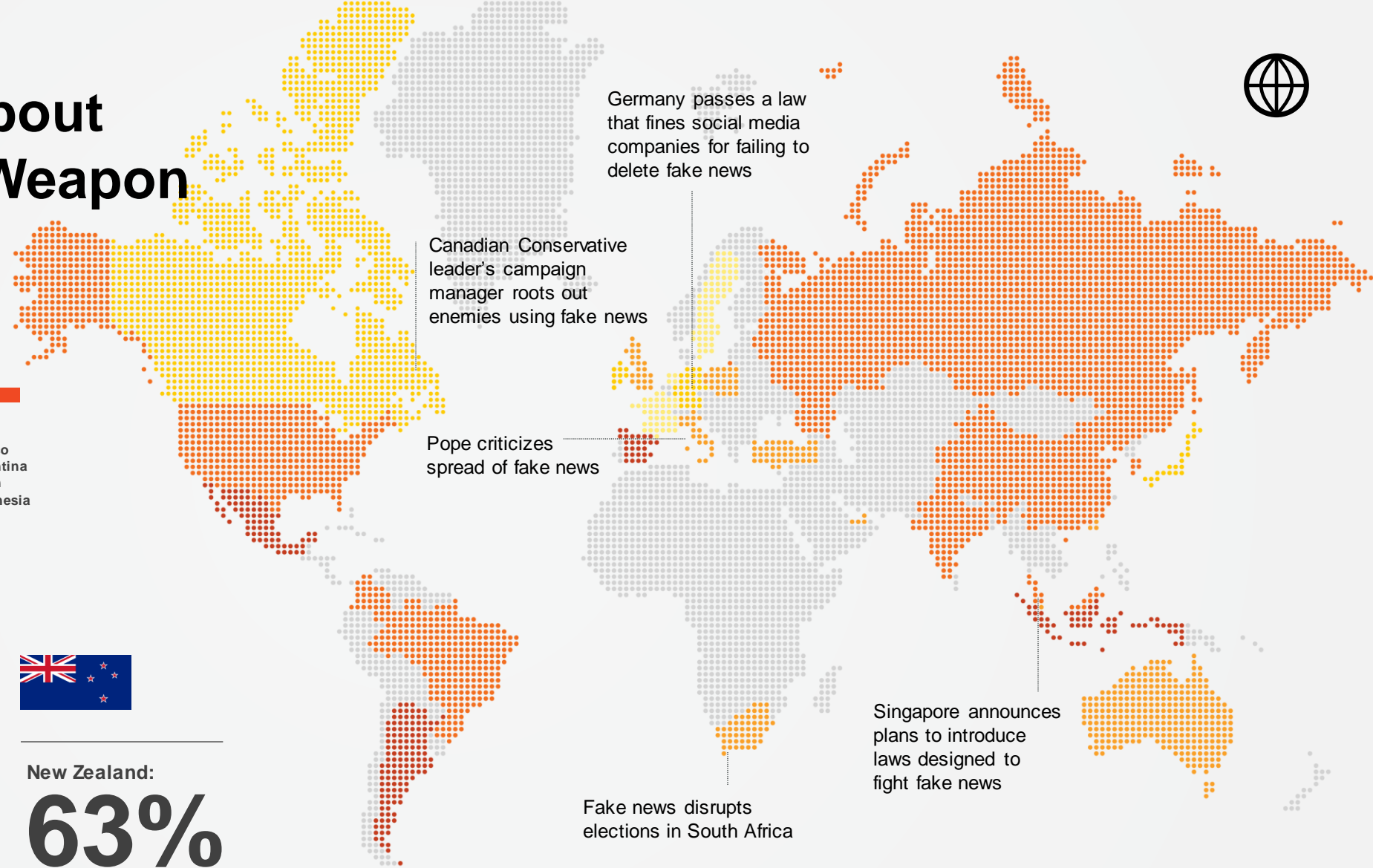
Percent who worry about false information or fake news being used as a weapon



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



New Zealand:  
**63%**



Germany passes a law that fines social media companies for failing to delete fake news

Canadian Conservative leader's campaign manager roots out enemies using fake news

Pope criticizes spread of fake news

Fake news disrupts elections in South Africa

Singapore announces plans to introduce laws designed to fight fake news

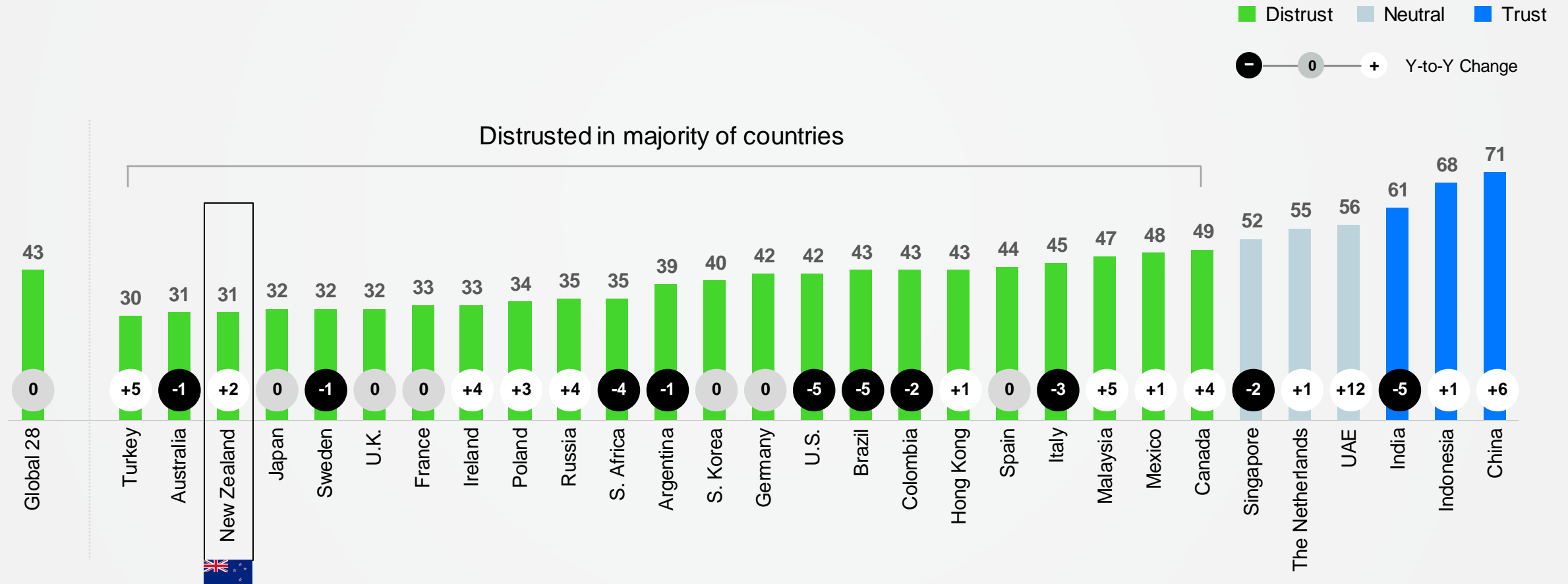


Source: 2018 Edelman Trust Barometer. ATT\_MED\_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree), question asked of half of the sample. General population, 28-country global total, New Zealand General Population (n=575).



# Media Now Least Trusted Institution

Percent trust in media, and change from 2017 to 2018



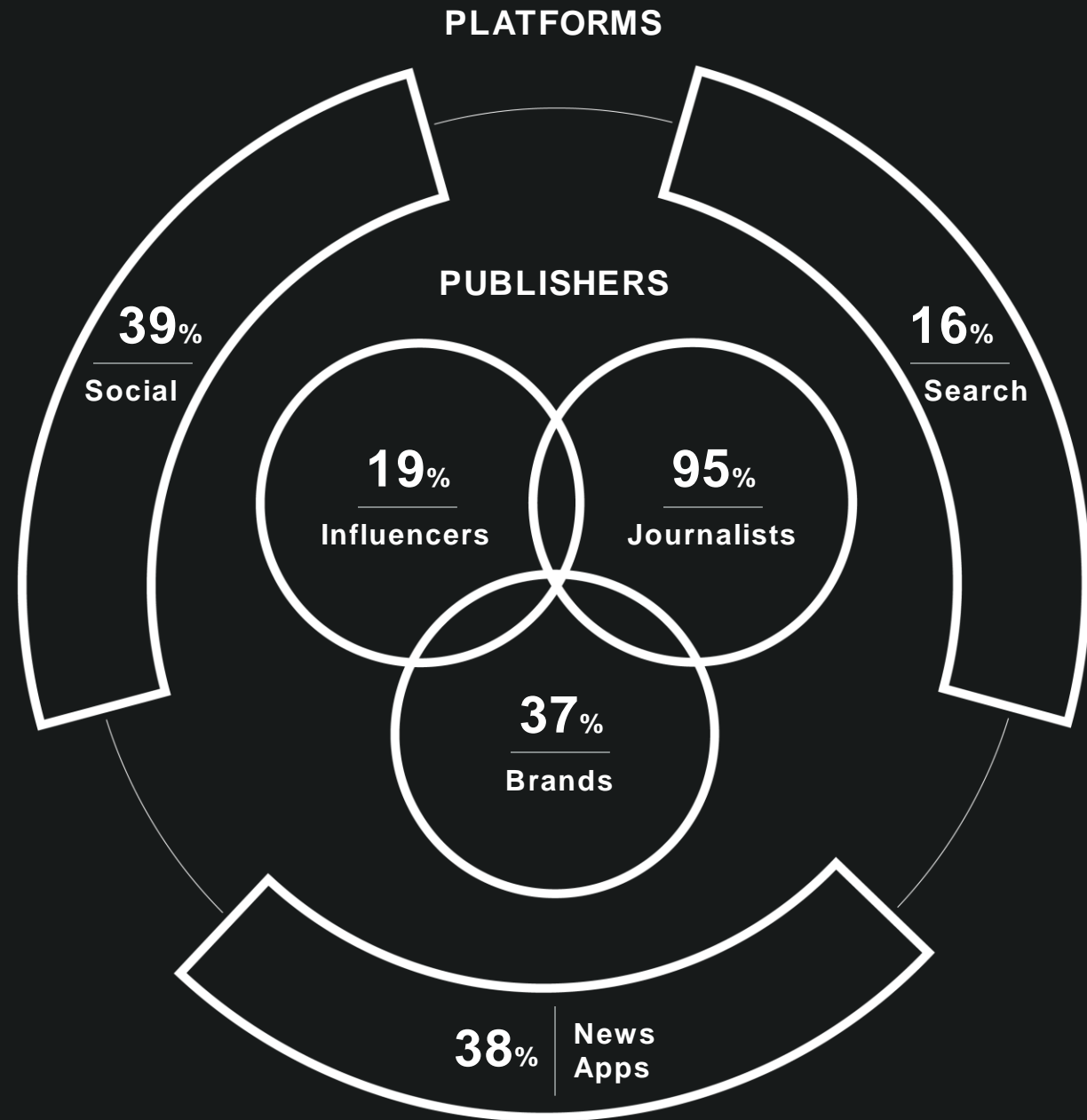
Source: 2018 Edelman Trust Barometer. TRU\_INS. [MEDIA IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General population, 28-country/global total, New Zealand General Population (n=1,150).

Global totals exclude New Zealand figures.

# People in New Zealand 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, 28-country global total, New Zealand General Population (n=1,150). 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.

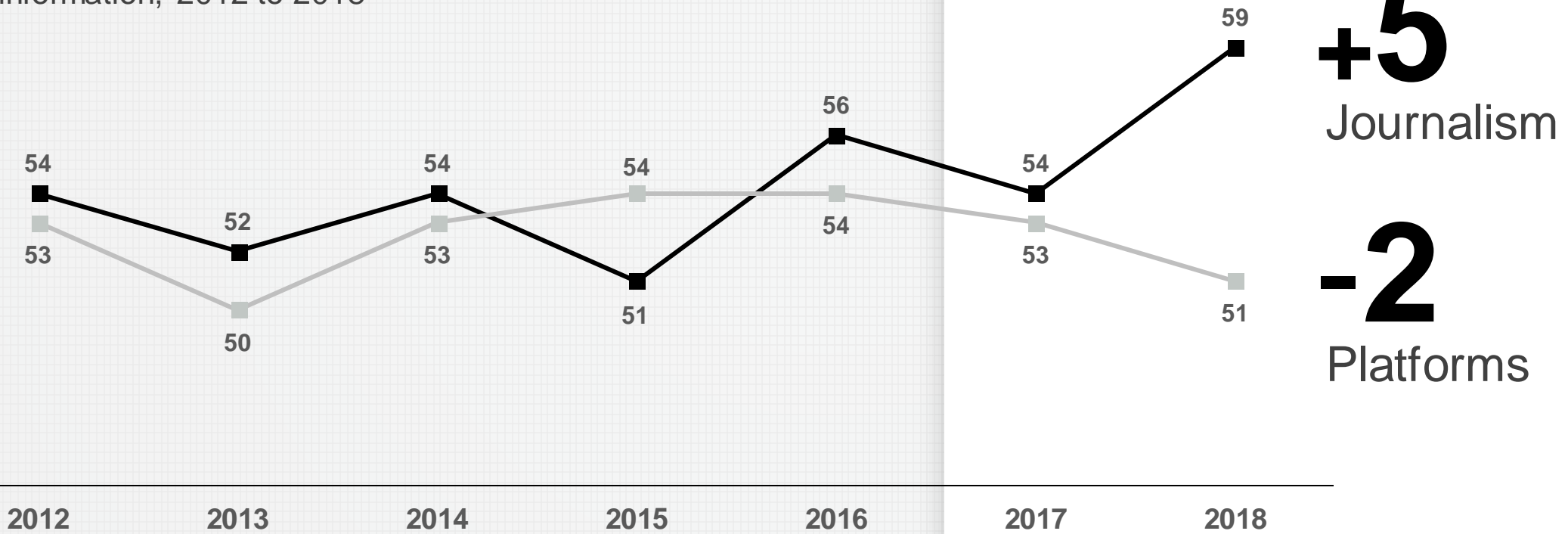




■ Average trust in traditional and online-only media    ■ Average trust in search engines and social media platforms

# Globally, While Trust in Platforms Declines, Trust in Journalism Rebounds

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



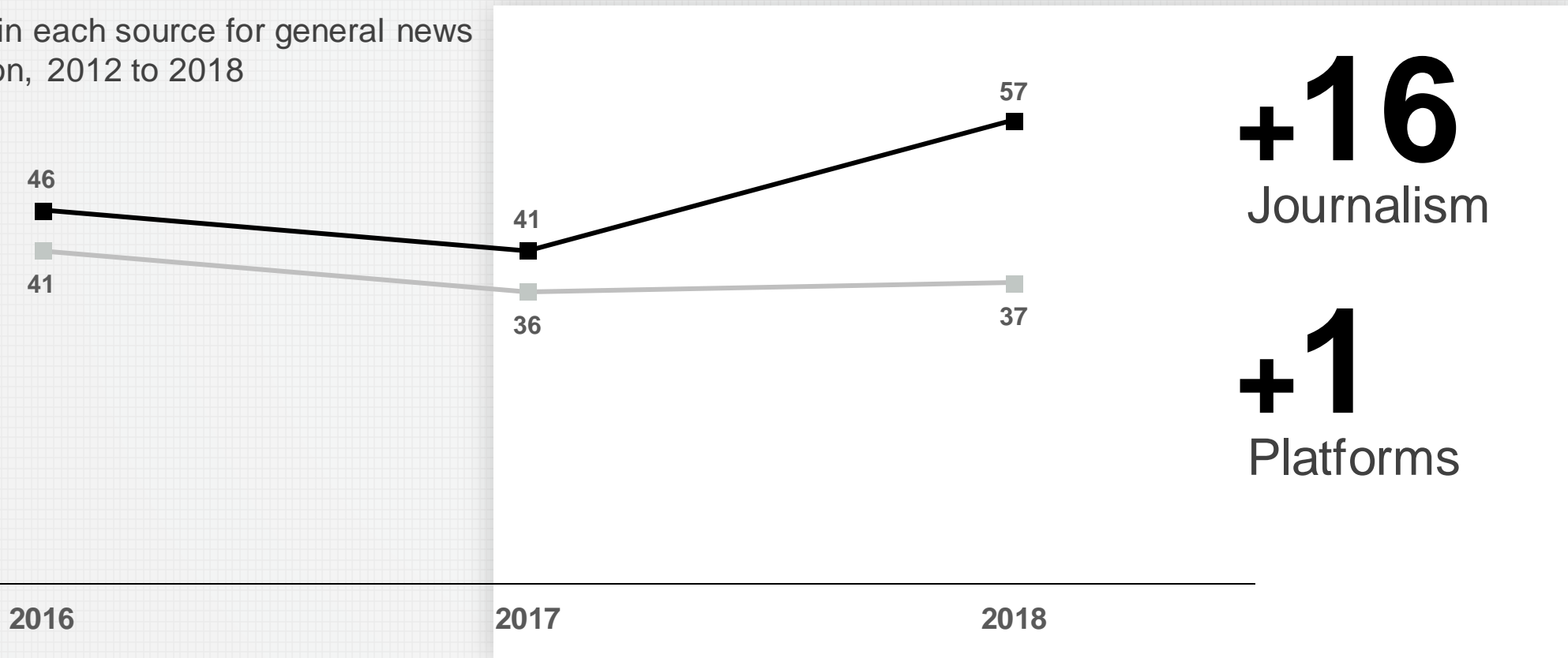
Source: 2018 Edelman Trust Barometer. COM\_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust), question asked of half of the sample. General population, 25-country global total.

Journalism is an average of traditional media and online-only media. Platforms is an average of search engines and social media.



# Trust in Journalism Outpaces Trust in Platforms in New Zealand

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



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-country global total, New Zealand General Population (n=1,150).

Journalism is an average of traditional media and online-only media. Platforms is an average of search engines and social media.

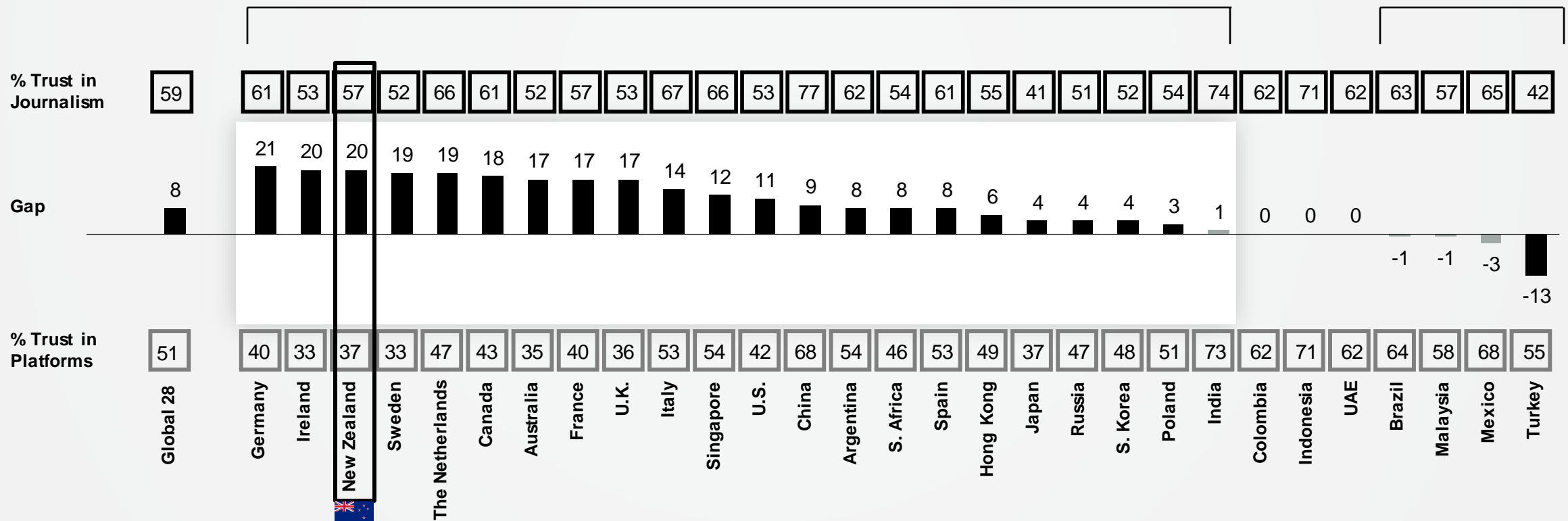
# Journalism More Trusted Than Platforms in Most Countries

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

Gap in trust in journalism vs. platforms

Journalism More Trusted

Platforms More Trusted



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, 28-country global total.

Journalism is an average of traditional media and online-only media. Platforms is an average of search engines and social media.

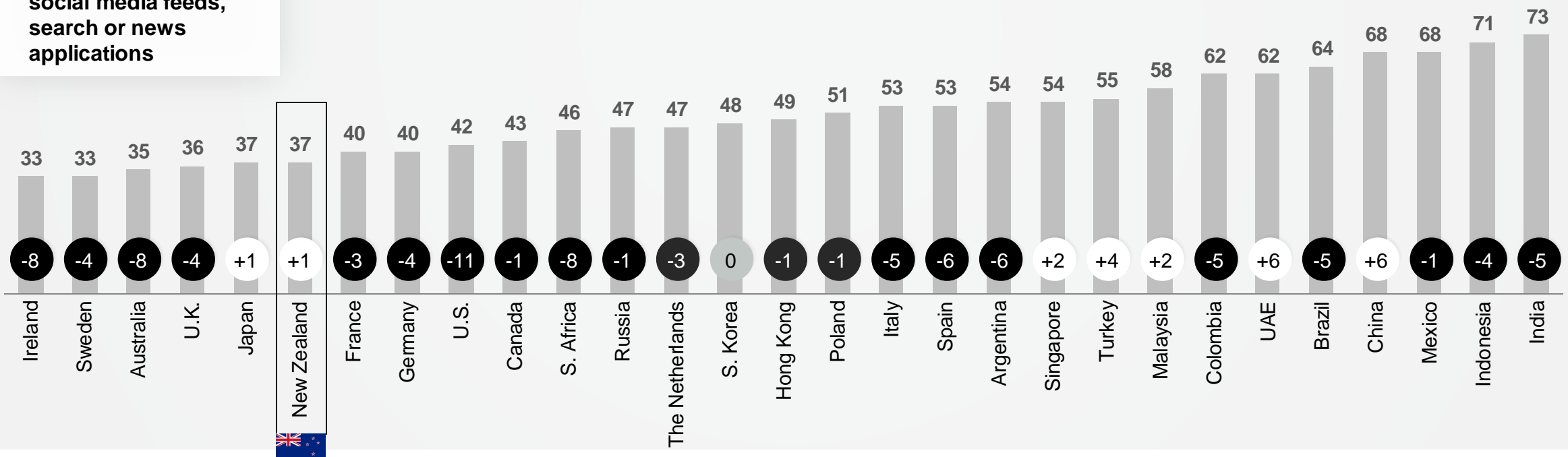


# Trust in Platforms Decreased in Most Countries

Average trust in search engines and social media platforms, and change from 2017 to 2018

Y-to-Y Change

**65%** globally receive news through platforms such as social media feeds, search or news applications



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. 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-country global total, New Zealand General Population (n=1,150).

Platforms is an average of search engines and social media. Global totals exclude New Zealand figures.

# Half Disengaged With the News

## Consumption

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

## Amplification

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

Source: 2018 Edelman TrustBarometer. 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-country global total. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

NB: Numbers for New Zealand do not sum to 100% due to rounding



**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



**54%**  
**The Disengaged**

**32%**  
**Consumers**

**13%**  
**Amplifiers**

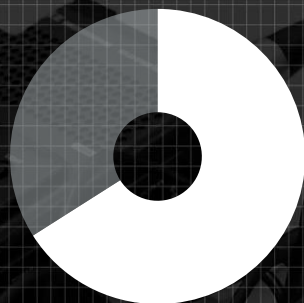




# Skeptical About News Organizations

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

## Attracting Large Audiences

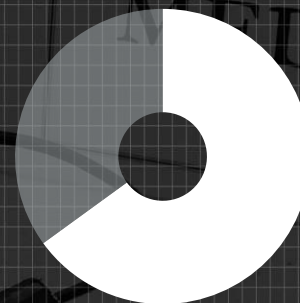


**66%**  
are more concerned with attracting a big audience than reporting

New Zealand:

**69%**

## Breaking News

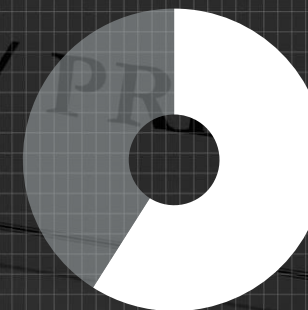


**65%**  
sacrifice accuracy to be the first to break a story

New Zealand:

**64%**

## Politics



**59%**  
support an ideology vs. informing the public

New Zealand:



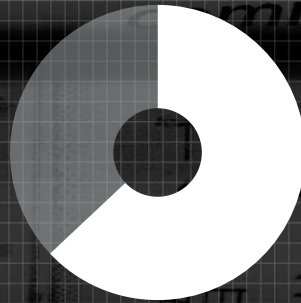
**48%**

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, New Zealand General Population (n=575).



# Uncertainty Over Real vs. Fake News

Percent who agree that ...

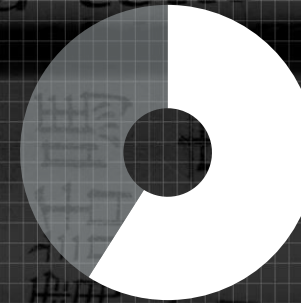


**63%**

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

New Zealand:

**64%**



**59%**

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

New Zealand:

**53%**



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, New Zealand General Population (n=575).



# Media Failing to Meet Expectations in New Zealand

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

## Trust-Building Mandate

## Performance Score

Guard information quality

26%

Educate people on important issues

46%

Investigate corruption and wrongdoing

44%

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. New Zealand General Population (n=1,150). For more details on the Trust-building mandates Analysis, please refer to the Technical Appendix.



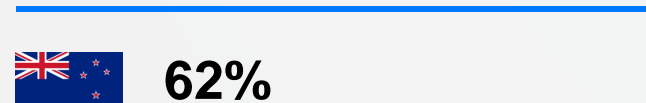
# Lack of Confidence in Media Undermining Trust and Truth

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

## Loss of Truth

I am not sure what is true and what is not

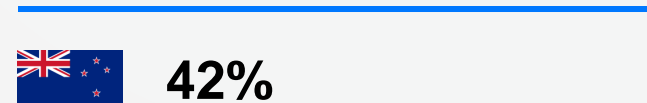
**59%**



## Loss of Trust in Government Leaders

I do not know which politicians to trust

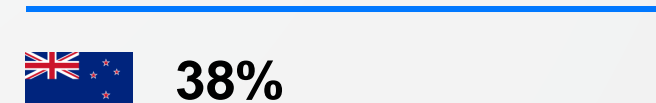
**56%**



## 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 who answered codes 1-3 at MED\_RSP. General population, 28-country global total, New Zealand General Population (n=365).



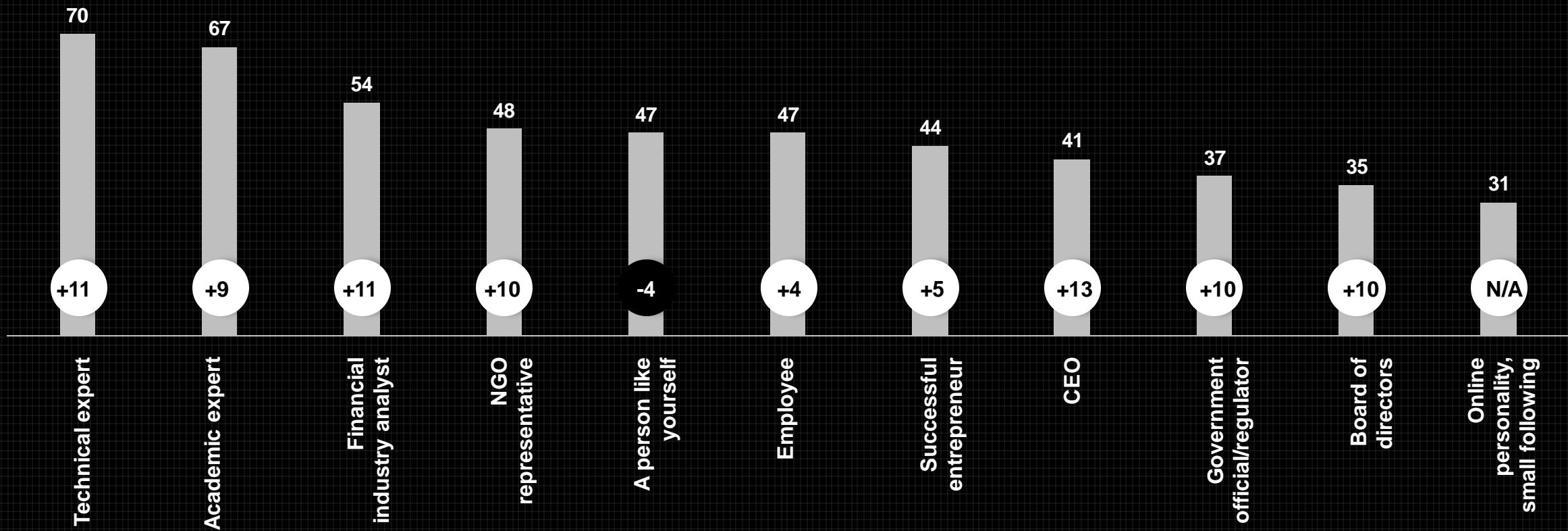
# Navigating a Polarized World



# Experts Further Strengthen Credibility

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

— 0 + Y-to-Y Change



Source: 2018 Edelman TrustBarometer. 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. New Zealand General Population (n=575).




# 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


# 60%

## For CEOs, reflecting company values is job one

Ensure their company is trusted  74

Business decisions reflect company values  74

Their products and services are high quality  72

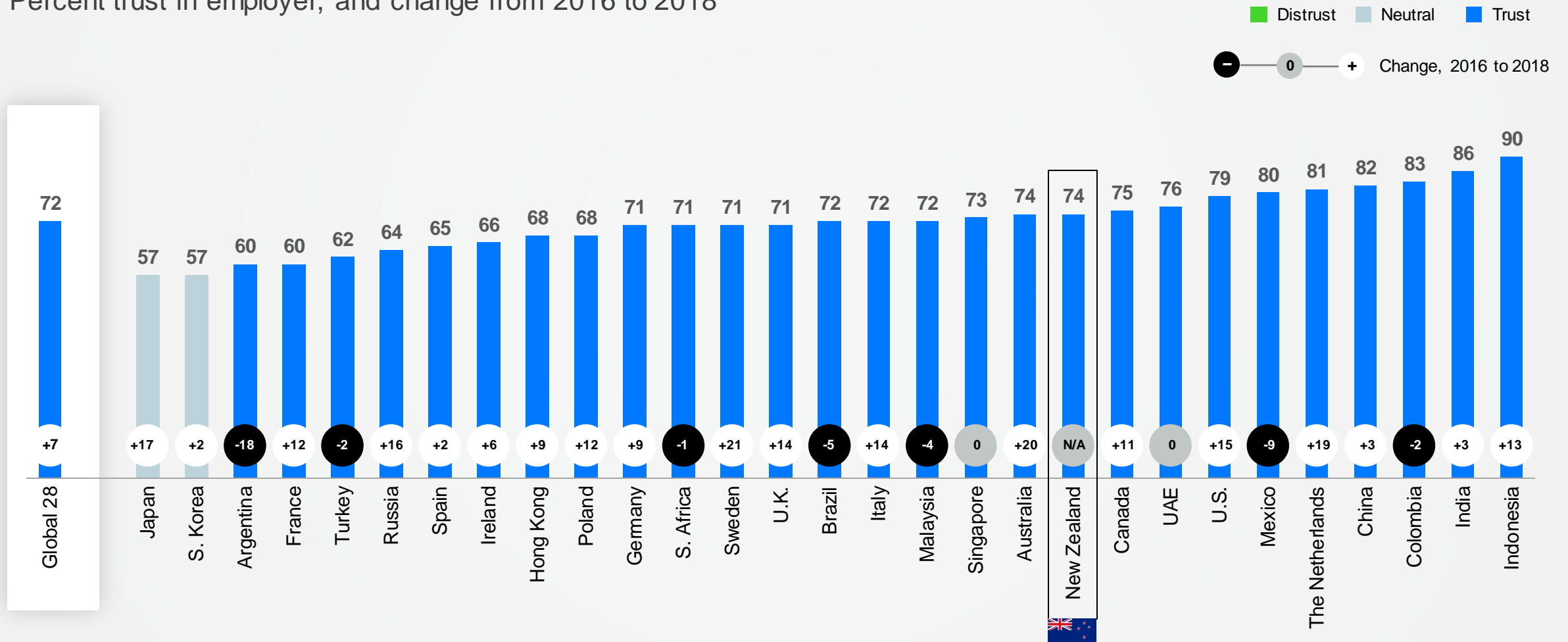
Set high ethical standards  70

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. New Zealand General Population (n=575).



# 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. New Zealand General Population (n=575).

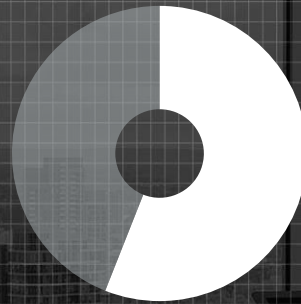
Note: 2016 data was taken from Q525-526. Thinking about your own company and other companies in your industry, please indicate how much you trust each to do what is right using a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". (Top 4 Box, Trust), question asked of half of the sample. General population, 28-country global total. Global total excludes New Zealand figures.



# Business Must Show Commitment to Long-Term



Percent who agree that ...

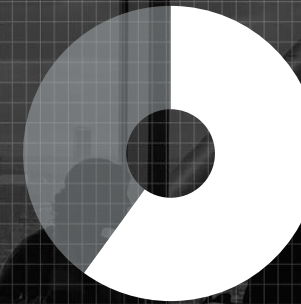


**56%**

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

New Zealand:

**44%**



**60%**

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

New Zealand:

**59%**



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-country global total, New Zealand General Population (n=575).

# Sector and Home Country

## Provide Context for Business Leadership

Y-to-Y Change

Percent trust in companies by industry sector and by their country of origin, and change from 2017 to 2018

### Sectors - Global



#### Most Trusted

Technology	75%
Education	70%
Professional Services	68%

#### Least Trusted

Financial Services	54%
CPG	60%
Automotive	62%

#### Biggest Y-to-Y Changes

Food and Beverage	-4
Automotive	-4
CPG	-3

### Sectors – New Zealand



#### Most Trusted

Education	71%
Healthcare	70%
Professional services	67%
Transportation	67%

#### Least Trusted

Fashion	43%
Financial Services	45%
Consumer Packaged Goods	49%
Entertainment	49%

#### Biggest Y-to-Y Changes – New Zealand

Consumer Packaged Goods	-7
Entertainment	-6
Professional Services	+5

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 asked of half of the sample. 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 asked of half of the sample. General Population, 28-country global total, New Zealand General Population (n=575).



# Business Must Address Market Dynamics

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

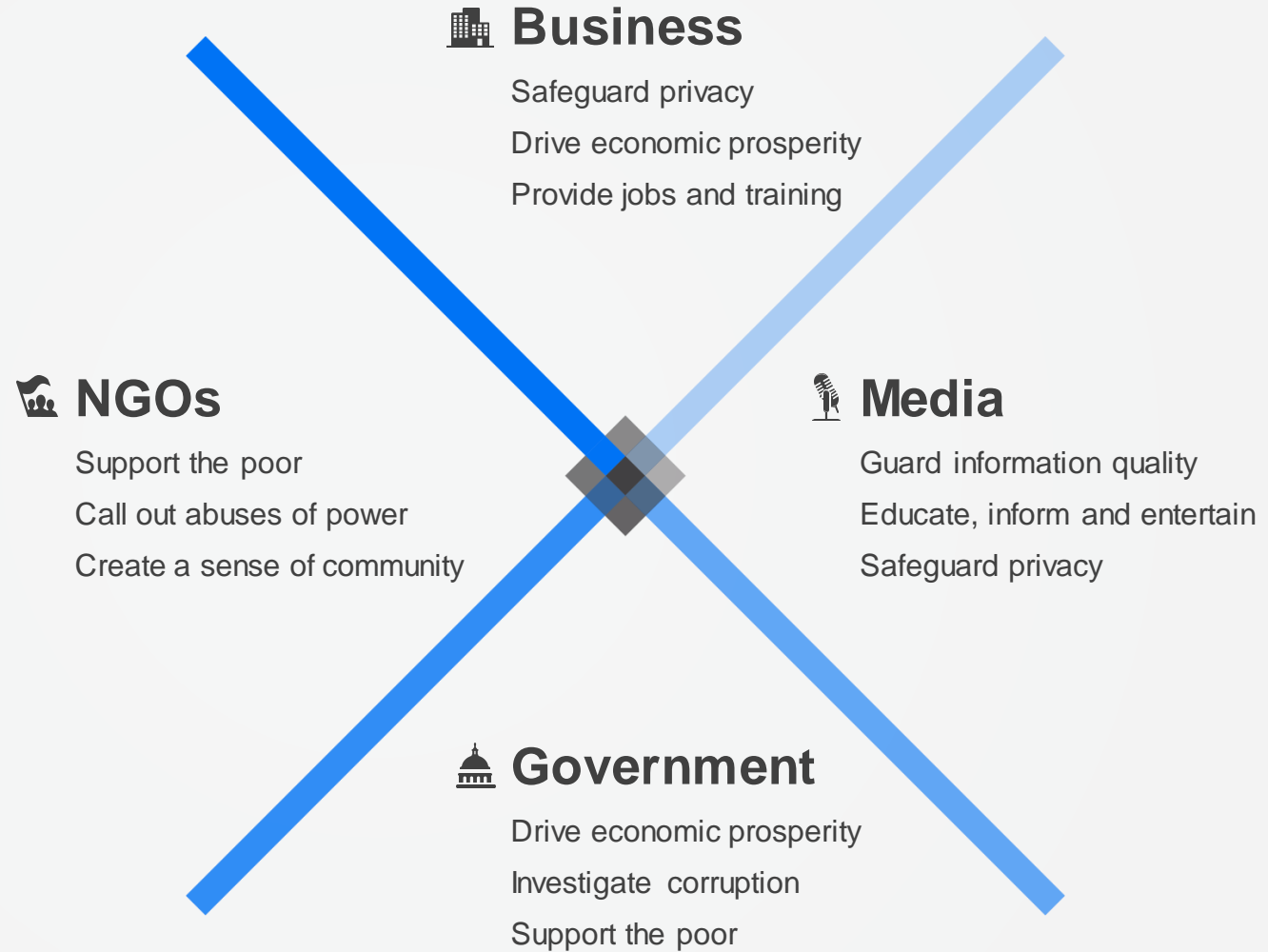
<b>Countries with extreme Trust Gains</b> <small>Countries include China, UAE, South Korea</small>	<b>Countries with Typical Changes in Trust</b> <small>Countries include Russia, Mexico, U.K., Japan</small>	<b>Countries with extreme Trust Losses</b> <small>Countries include U.S., India, Colombia, Brazil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

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-country global total. Trust-building mandates Analysis. The most effective 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-country global total. For more details on the Trust Volatility Measure and Trust Mandates Analysis, please refer to the Technical Appendix.



# Each Institution Must Play its Role

Top trust-building mandates for each institution



Source: 2018 Edelman Trust Barometer. Trust-Building Mandates Analysis. The most effective trust building mandates for each institution. INS\_EXP\_GOV; INS\_EXP\_MED; INS\_EXP\_BUS; and INS\_EXP\_NGO. 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. General population, 28-country global total. For more details on the Trust Mandates Analysis, please refer to the Technical Appendix.



**2018**  
**Edelman Trust Barometer**  
**Supplementary Data**

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## Supplementary Data

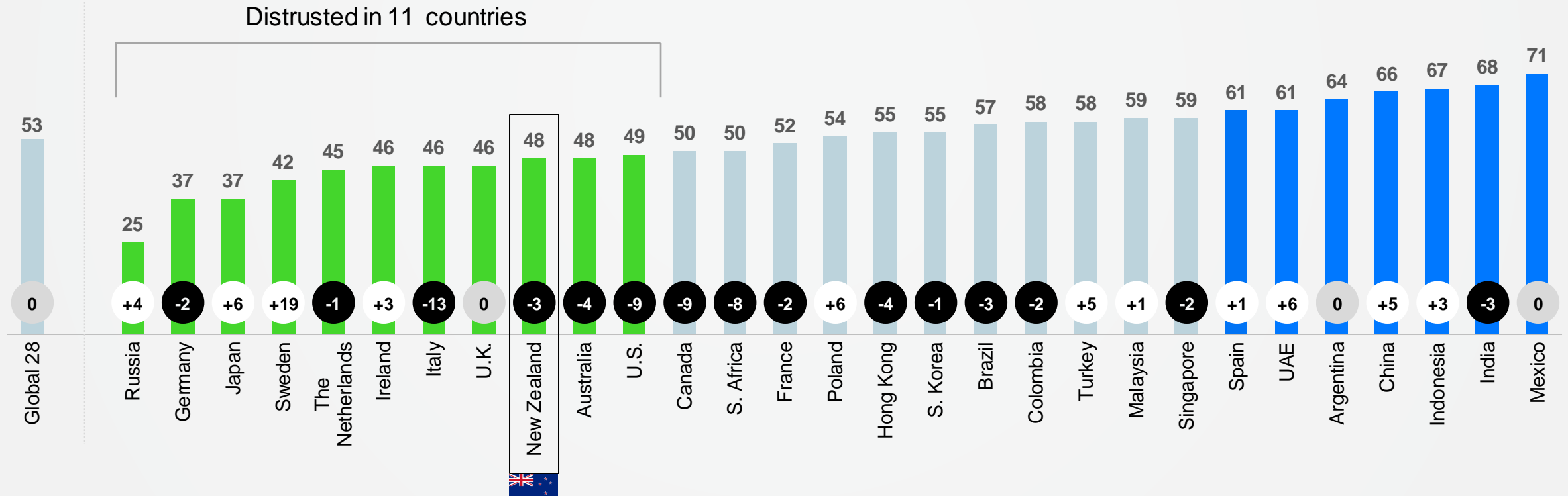
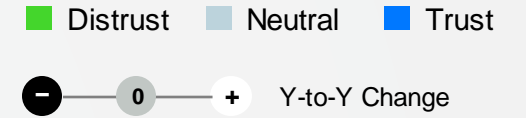
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- 1. Trust in institutions, 2018 and change from 2017**
- 2. Trust in institutions, 2012 to 2018**
- 3. Trust in industry sectors, 2018 and trends from 2012 to 2018**
- 4. Trust in countries of origin, 2018 and change from 2017**



# Trust in NGOs Declines in 15 Countries

Percent trust in NGOs, and change from 2017 to 2018



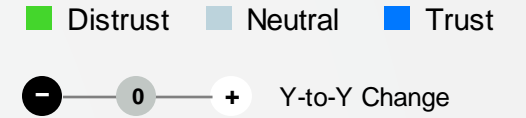
Source: 2018 Edelman Trust Barometer. TRU\_INS. [NGOs IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, 28-country global total, New Zealand General Population (n=1,150).

Global total excludes New Zealand figures.

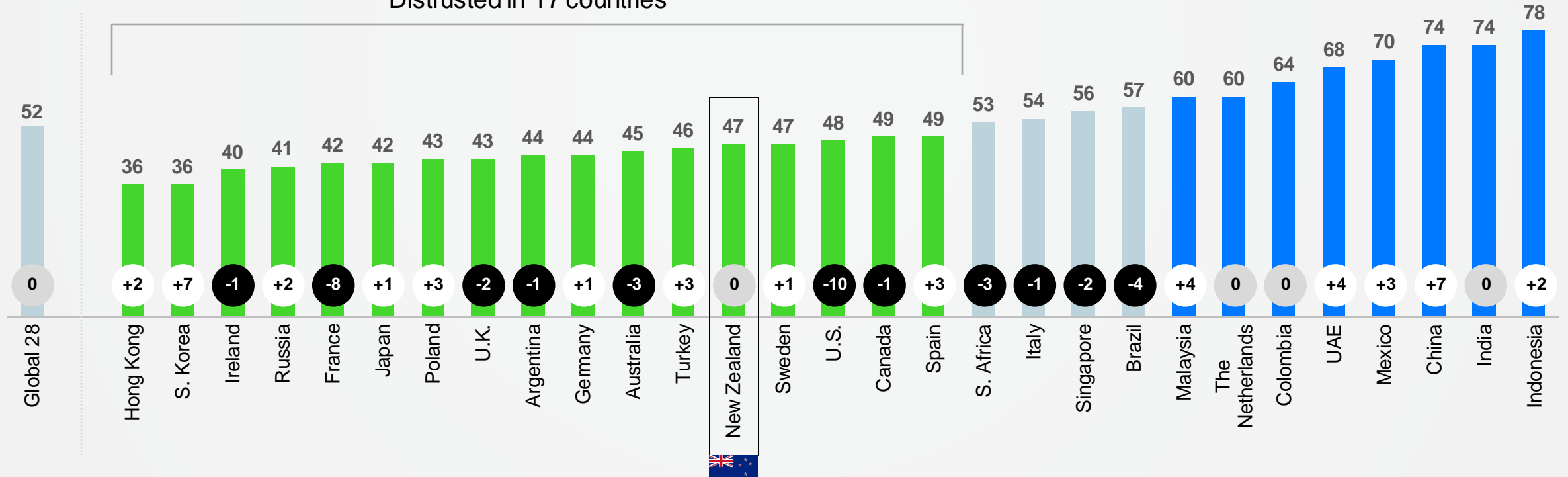


# Trust in Business Increases in 14 Countries

Percent trust in business, and change from 2017 to 2018



## Distrusted in 17 countries



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-country global total, New Zealand General Population (n=1,150).

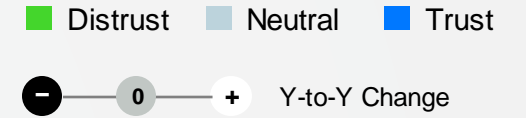
Global total excludes New Zealand figures.



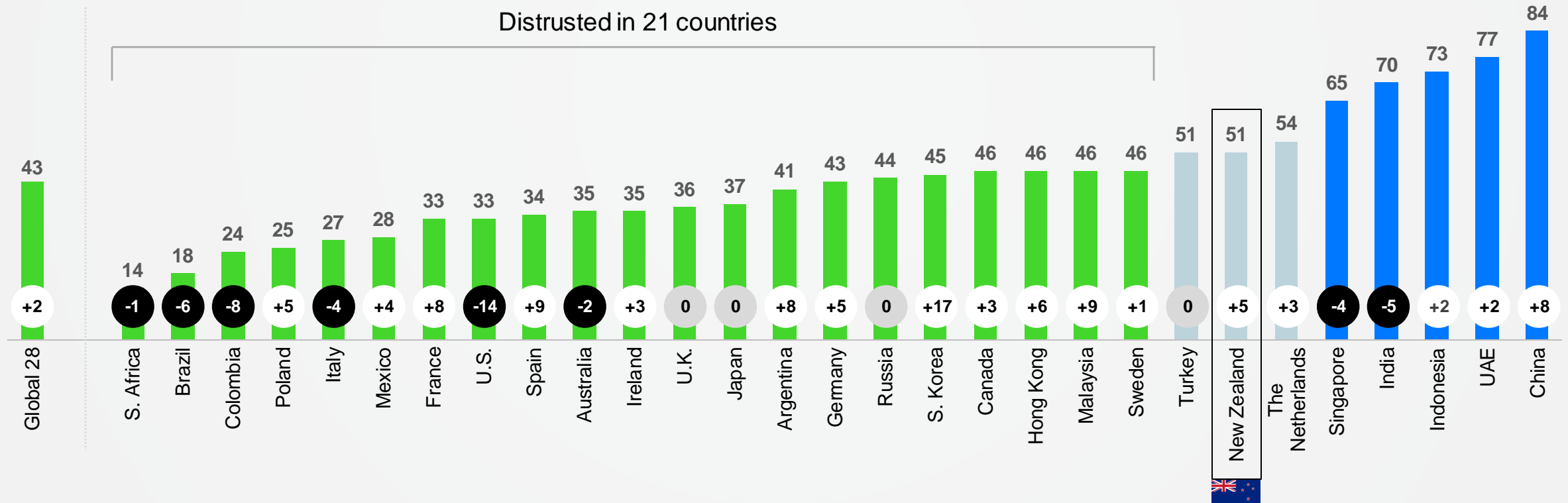


# Trust in Government Increases in 17 Countries

Percent trust in government, and change from 2017 to 2018



Distrusted in 21 countries



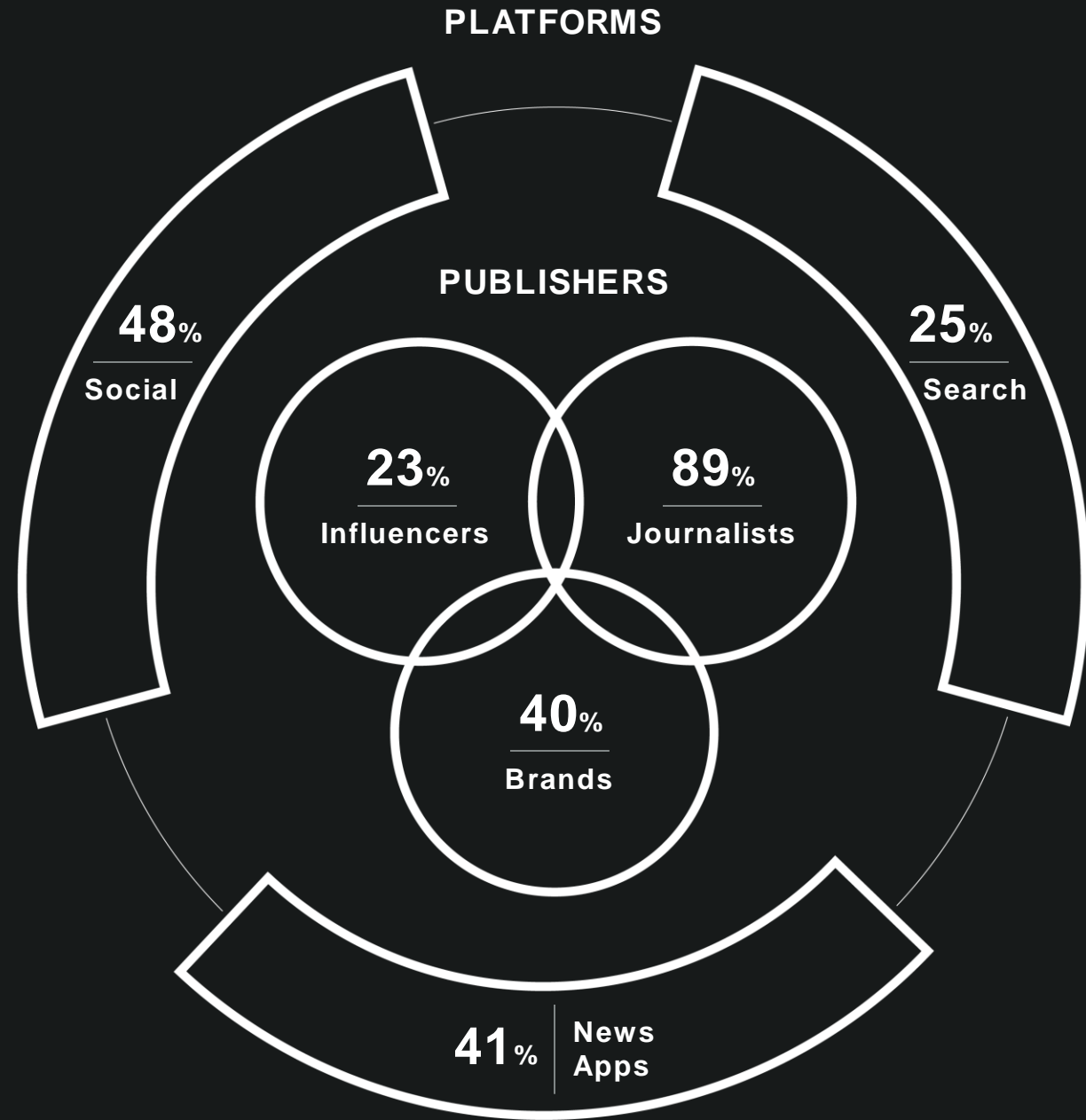
Source: 2018 Edelman Trust Barometer. TRU\_INS. [GOVERNMENT IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, 28-country global total, New Zealand General Population (n=1,150).

Global total excludes New Zealand figures.

# 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, 28-country global total. 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 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

Trust-Building Mandate	Performance Score
Guard information quality	36%
Educate people on important issues	50%
Inform good life decisions	45%

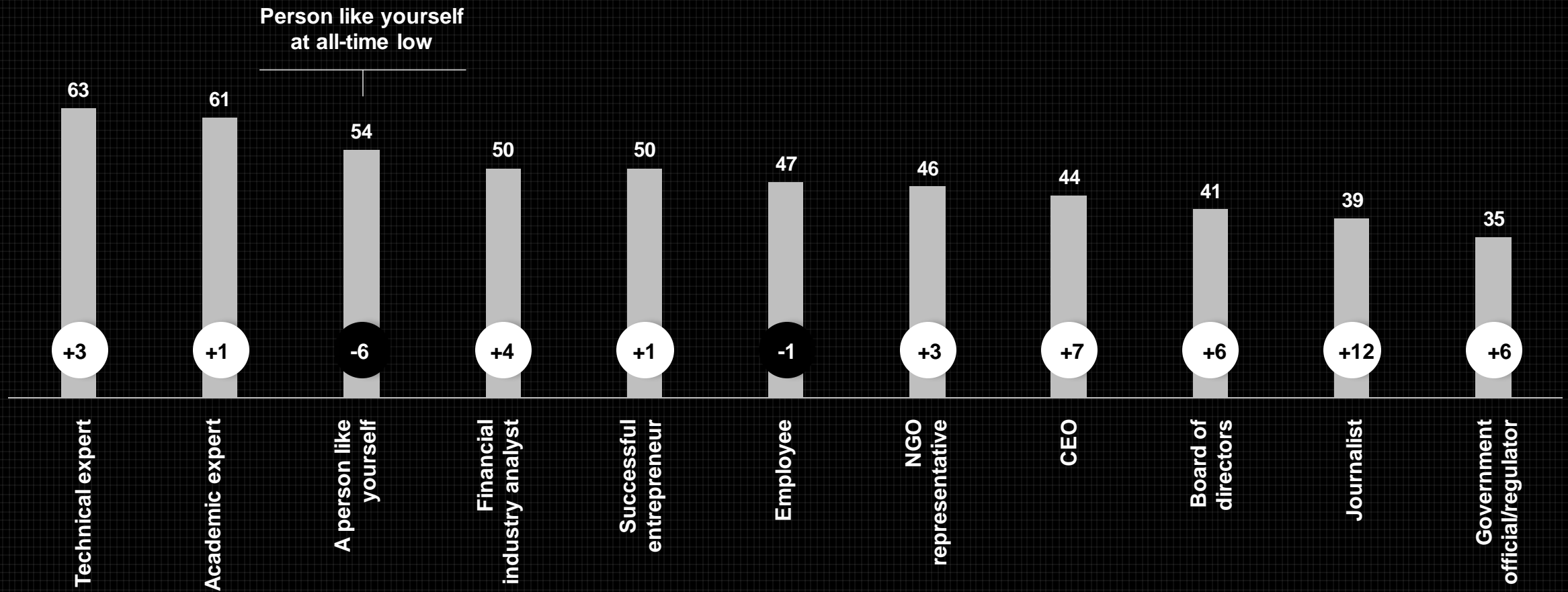
Source: 2018 Edelman Trust Barometer. Trust-building mandates Analysis. The most effective trust building mandates for each institution. INS\_EXP\_MED. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about the media in general, how would you 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, 28-country global total. For more details on the Trust-building mandates Analysis, please refer to the Technical Appendix.

# Voices of Authority Regain Credibility



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

— 0 + Y-to-Y Change



Source: 2018 Edelman TrustBarometer. 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-country global total.



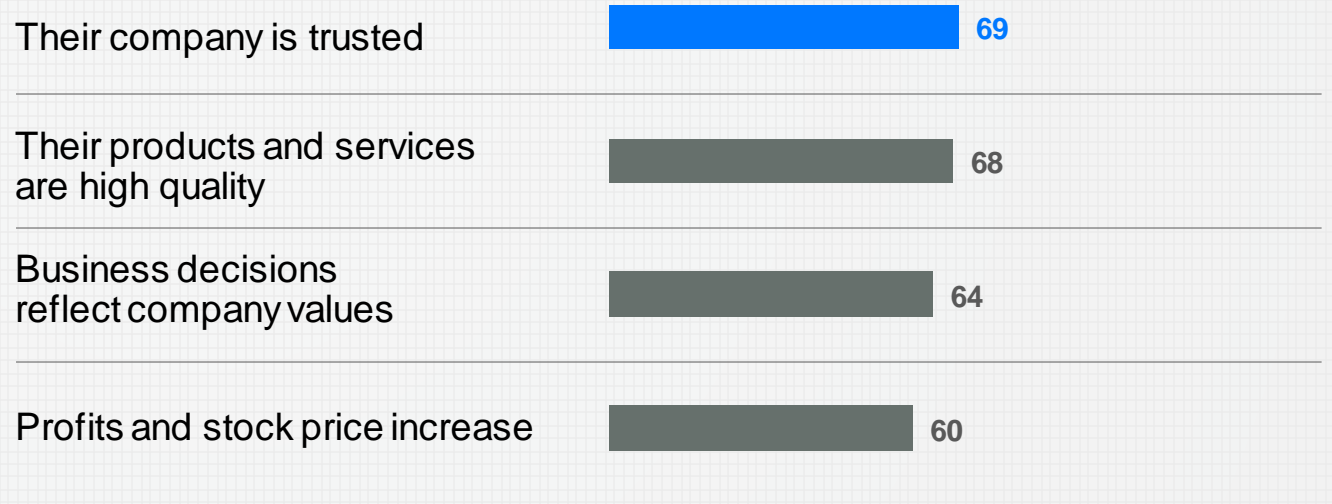
# Business Is Expected to Lead

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

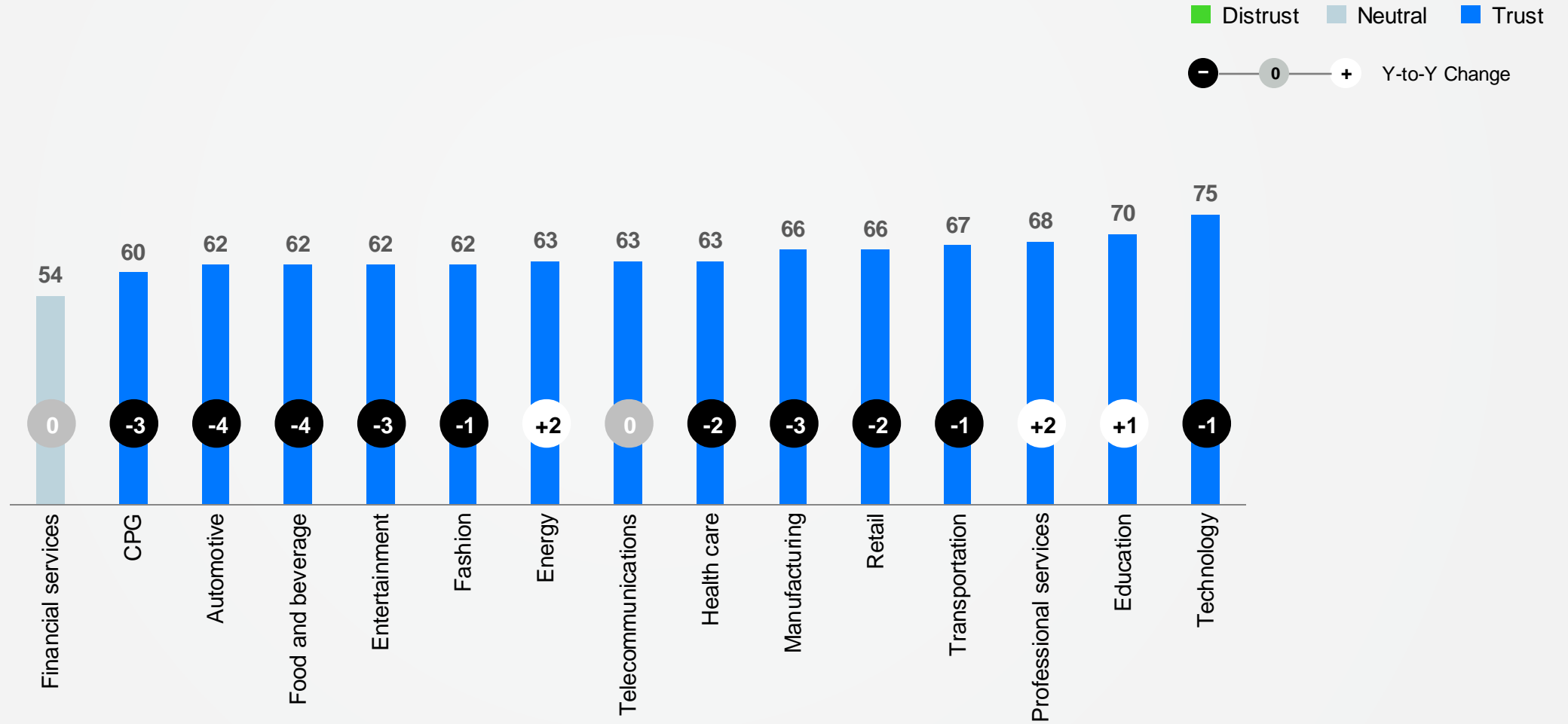


Source: 2018 Edelman Trust Barometer. CEO\_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. CEO\_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about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



# Trust Declines in 10 of 15 Sectors

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

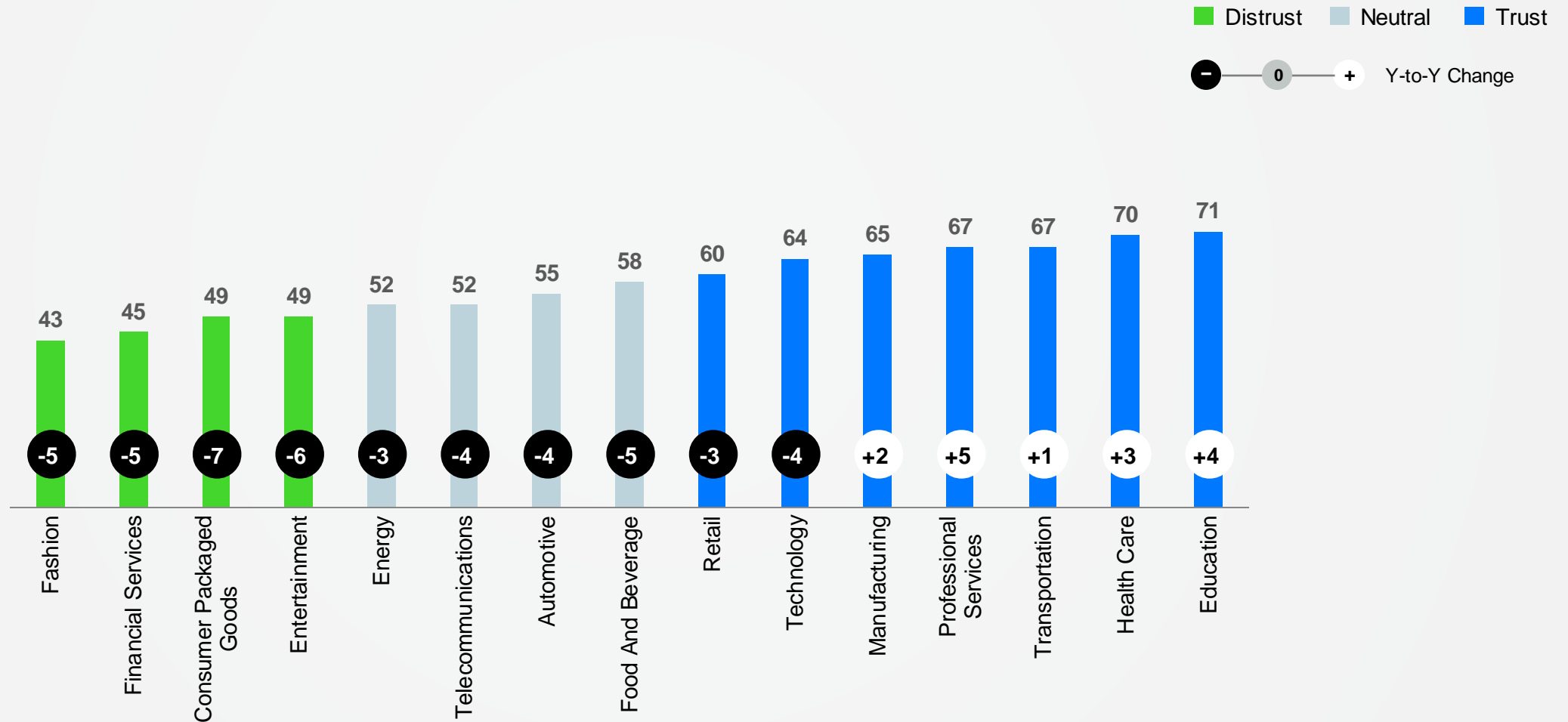


Source: 2018 Edelman Trust Barometer. TRU\_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. (Top 4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

# Trust Declines in Majority of Sectors



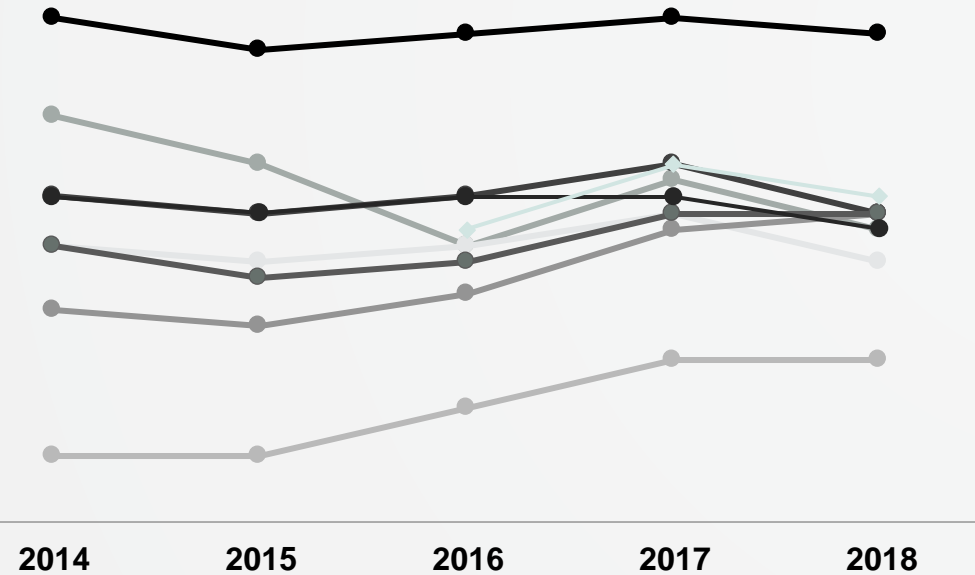
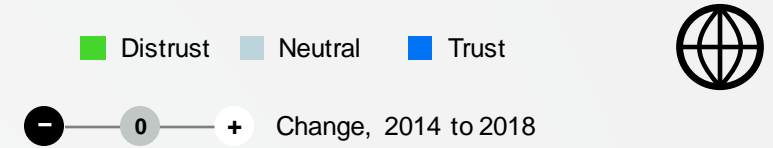
Percent who trust each sector, and change from 2017 to 2018



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. New Zealand General Population (n=575).

# Trust in Industry Sectors, Five-Year Trends


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-country global total.





**2018**  
**Edelman Trust Barometer**  
**Technical Appendix**

# 2018 Edelman Trust Barometer

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### Technical Appendix

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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 Countries



18 years of data

33,000+ respondents total

All fieldwork was conducted between

October 28 and November 20, 2017

### Survey in New Zealand



3 years of data

1150 respondents total

New Zealand fieldwork was conducted in XX  
December, 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), New Zealand +/- 4.4 (N=1,150).

## General Online Population

7 years in 25+ countries

Ages 18+

1,150 respondents per country

1,150 respondents in New Zealand

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

XX in New Zealand

Must meet 4 criteria:

Ages 25-64

College educated

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

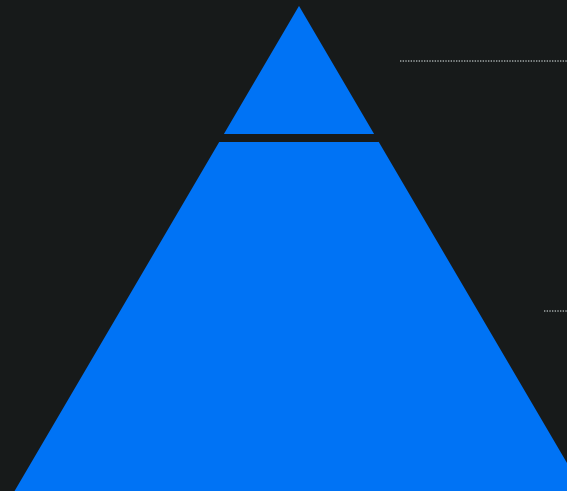
Report significant media consumption and engagement in business news

## Mass Population

All population not including informed public

Represents 85% of total global population

1,065 in New Zealand



## 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
<b>Global</b>	<b>32,200</b>	<b>Age, Gender, Region</b>	<b>+/- 0.6% total sample +/- 0.8% half sample</b>	<b>6,200</b>	<b>Age, Education, Gender, Income</b>	<b>+/- 1.2% total sample +/- 1.8% split sample</b>
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 countries	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
New Zealand	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	158	Age, Education, Gender, Income	+/- 7.8% total sample +/- 11.0% 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 Country

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

	Languages	Internet Penetration*		Languages	Internet Penetration*		Languages	Internet Penetration*
<b>Global</b>	-	50%	<b>India</b>	Hindi & English	34%	<b>Singapore</b>	English & Simplified Chinese	81%
<b>Argentina</b>	Localized Spanish	79%	<b>Indonesia</b>	Indonesian	50%	<b>South Africa</b>	English & Afrikaans	54%
<b>Australia</b>	English	88%	<b>Ireland</b>	English	94%	<b>South Korea</b>	Korean	93%
<b>Brazil</b>	Portuguese	66%	<b>Italy</b>	Italian	87%	<b>Spain</b>	Spanish	87%
<b>Canada</b>	English & French Canadian	90%	<b>Japan</b>	Japanese	94%	<b>Sweden</b>	Swedish & English	93%
<b>China</b>	Simplified Chinese	53%	<b>Malaysia</b>	Malay	79%	<b>Turkey</b>	Turkish	70%
<b>Colombia</b>	Localized Spanish	58%	<b>Mexico</b>	Localized Spanish	65%	<b>UAE</b>	Arabic & English	91%
<b>France</b>	French	87%	<b>Netherlands</b>	Dutch & English	95%	<b>U.K.</b>	English	95%
<b>Germany</b>	German	90%	<b>Poland</b>	Polish	73%	<b>U.S.</b>	English	88%
<b>Hong Kong</b>	English & Traditional Chinese	87%	<b>Russia</b>	Russian	76%			

\*Data source: <http://www.internet-worldstats.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.

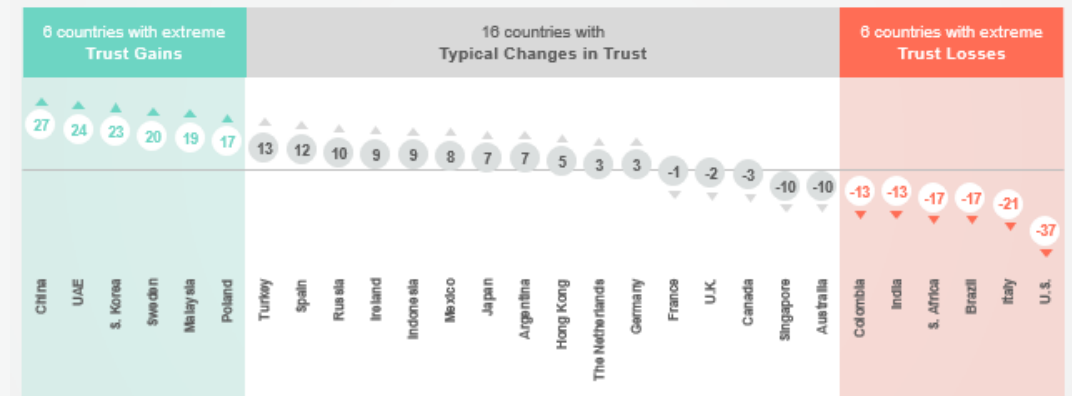
The volatility measure is the aggregate year-over-year change in trust for each of the four institutions at the country level. The individual trust changes (positive and negative) were summed across all four institutional entities to yield the aggregate trust volatility. This method reflects the net 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 country for every year from 2013-2018, we characterized greater-than-expected aggregate trust gains and losses. We looked at the volatility scores from all countries 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 countries—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 country 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 Country

	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.

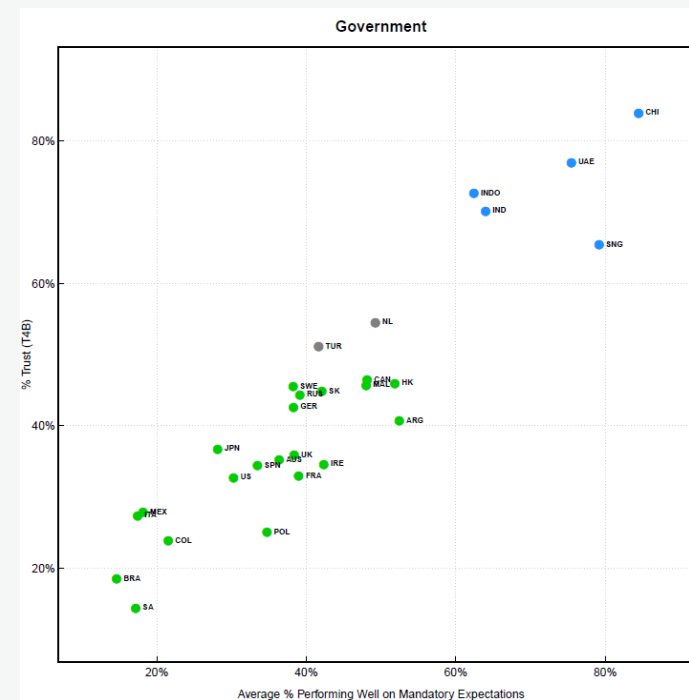
Globally, respondents identified an average of 10 mandates for each institution, and there was large variation in the mandates among respondents, even from within the same country. Thus, an institution’s overall performance must first be evaluated at a respondent level, rather than as country averages.

To measure this, we averaged the performance scores of all the mandates for each respondent. Then, we calculated the percent of respondents within each country 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 countries.

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

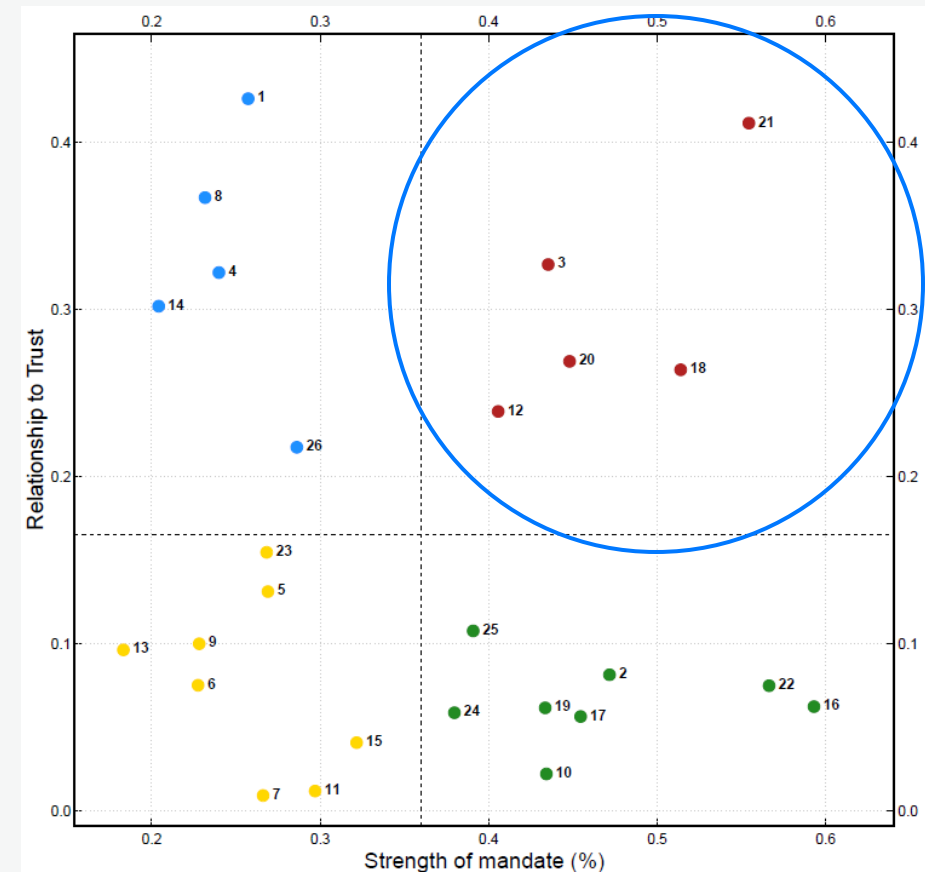
# 2. How We Prioritized the Trust-Building Mandates

The next step was to establish a hierarchy within the mandates, as different institutions have different societal roles, which may also vary by country. 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**  
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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.