

2016 Edelman Trust Barometer

An Opportunity for Business



Methodology

Online Survey in 28 Countries

- ▶ 16 years of data
- ▶ 33,000+ respondents total
- ▶ All fieldwork was conducted between October 13th and November 16th, 2015



General Online Population

- ▶ 5 years in 25+ markets
- ▶ Ages 18+
- ▶ 1,150 respondents per country



Informed Public

- ▶ 8 years in 20+ markets
- ▶ Represents 15% of total global population
- ▶ 500 respondents in U.S. and China; 200 in all other countries

Must meet 4 criteria:

- ▶ Ages 25-64
- ▶ College educated
- ▶ In top 25% of household income per age group in each country
- ▶ Report significant media consumption and engagement in business news



Mass Population

- ▶ All population not including Informed Public
- ▶ Represents 85% of total global population

An Opportunity for Business



A Position of Strength

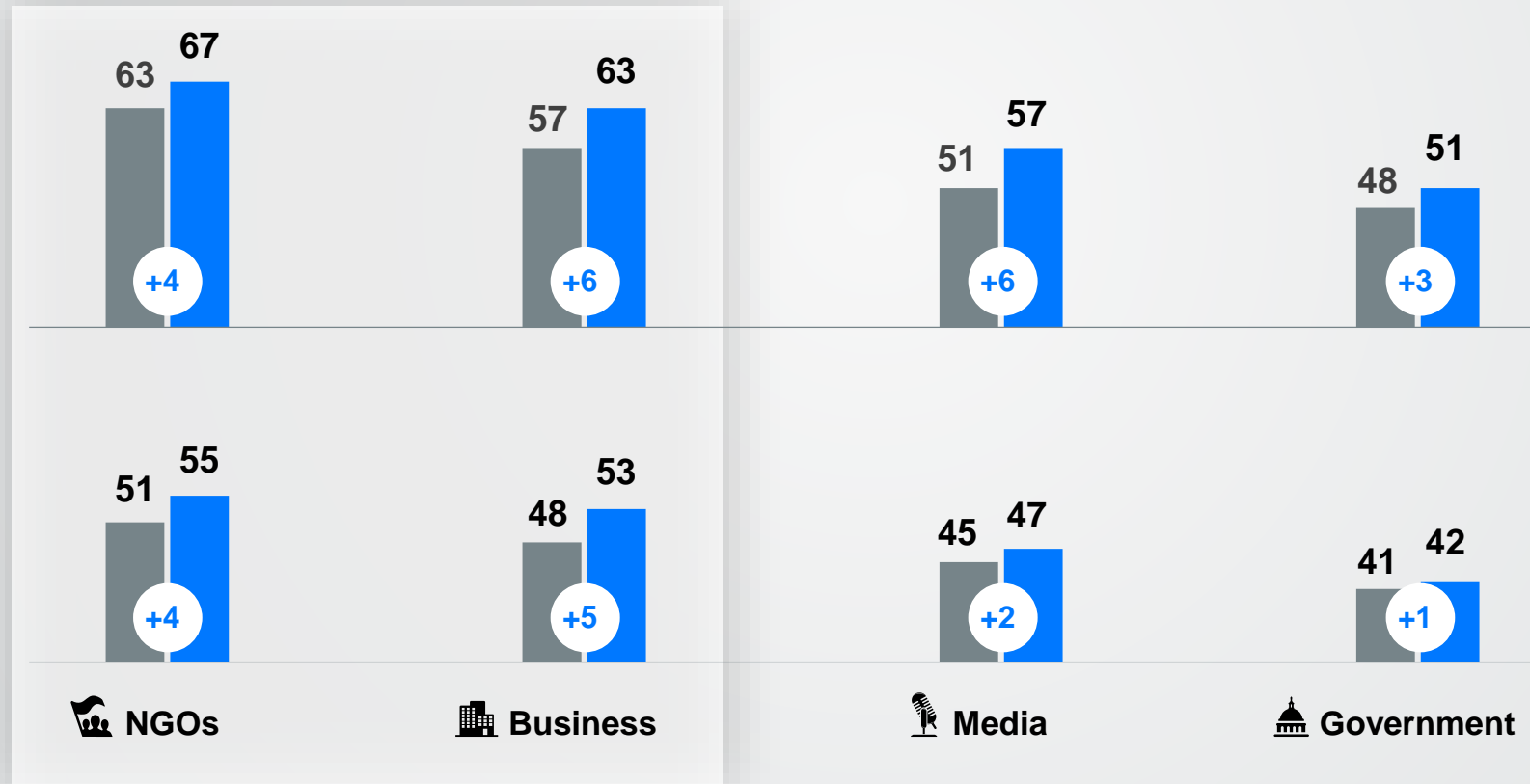
Percent trust in the four institutions of government, business, media and NGOs, 2015 vs. 2016

2015 2016

Business closing NGO's long-held lead in trust

Informed Public

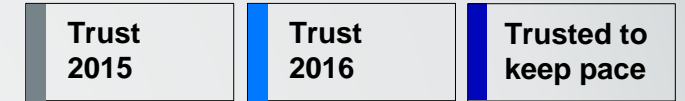
General Population



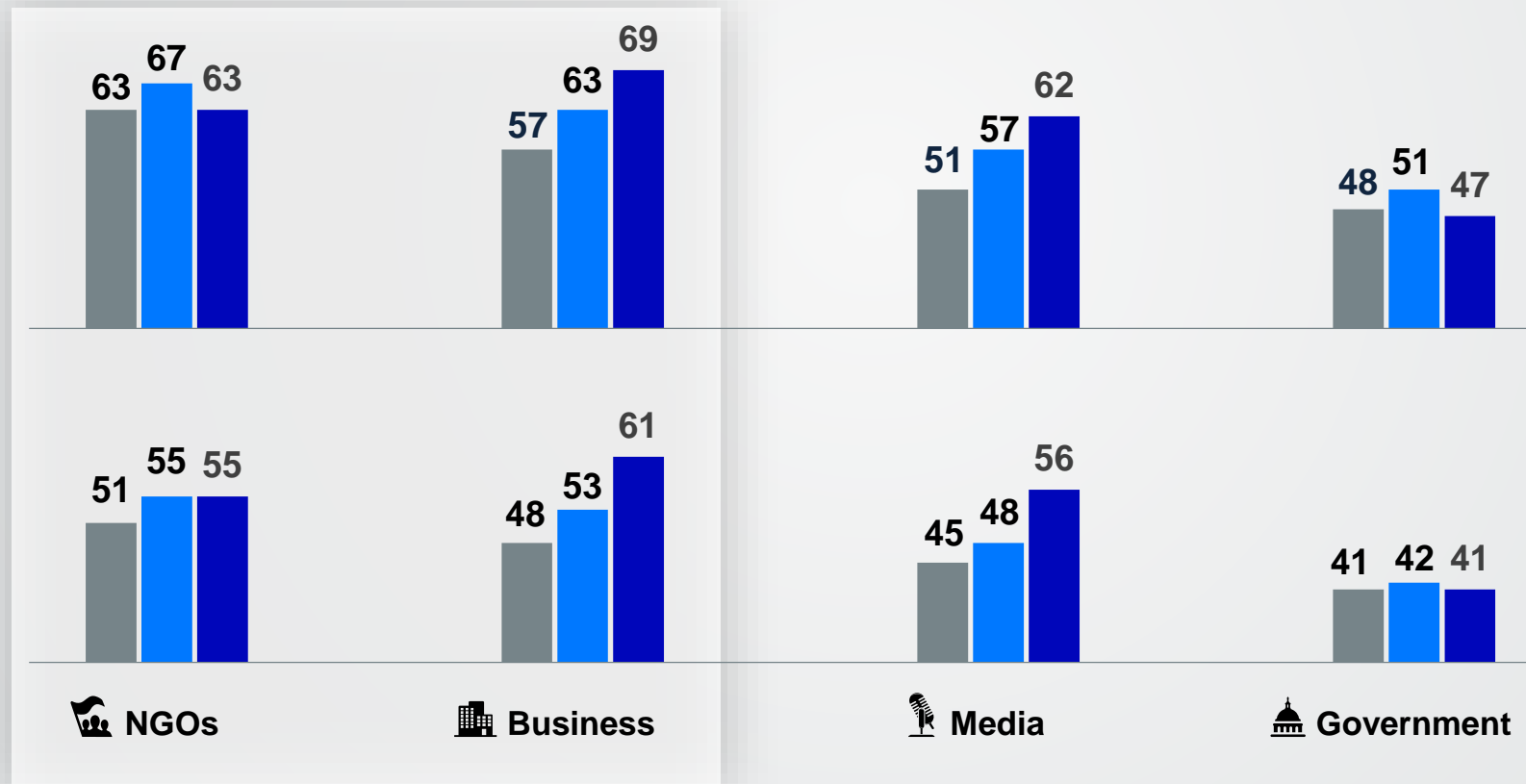
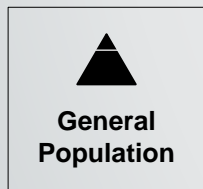
Source: 2016 Edelman Trust Barometer Q11-14. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and General Population, 27-country global total.

Business Most Trusted to Keep Pace

Percent trust, 2015 and 2016, and percent who trust each institution to keep up with the changing times, 2016



Business in the lead



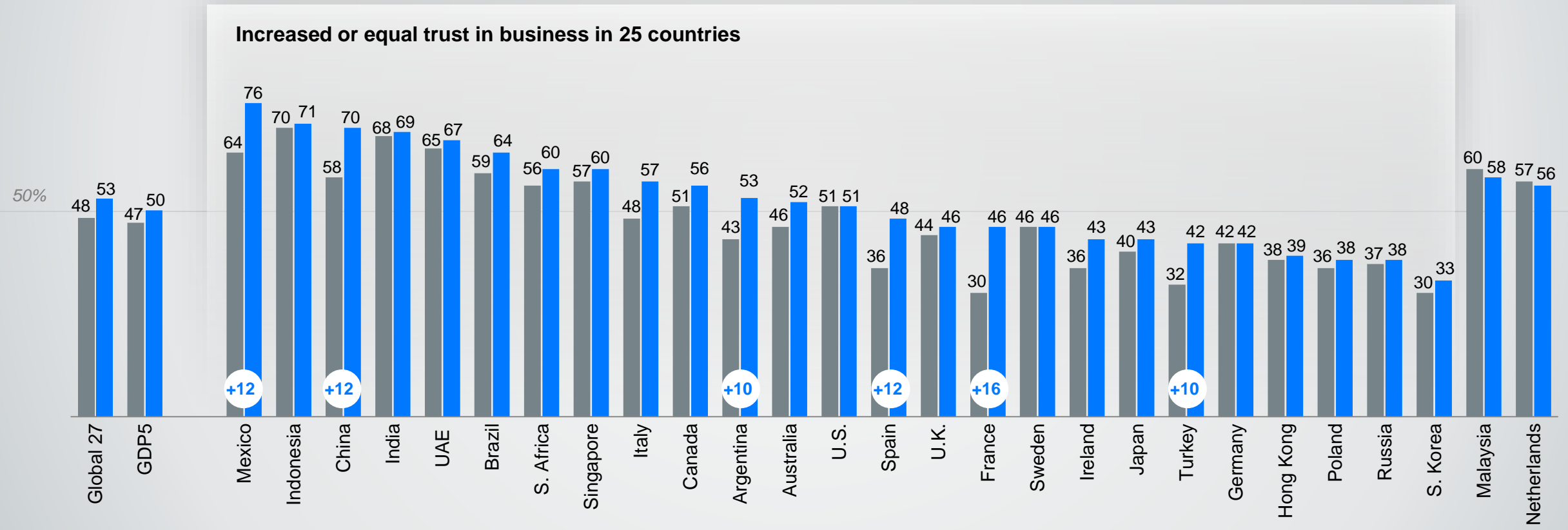
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Global Increase in Business Trust

Percent trust in business, 2015 vs. 2016

▲ General Population

2015 2016



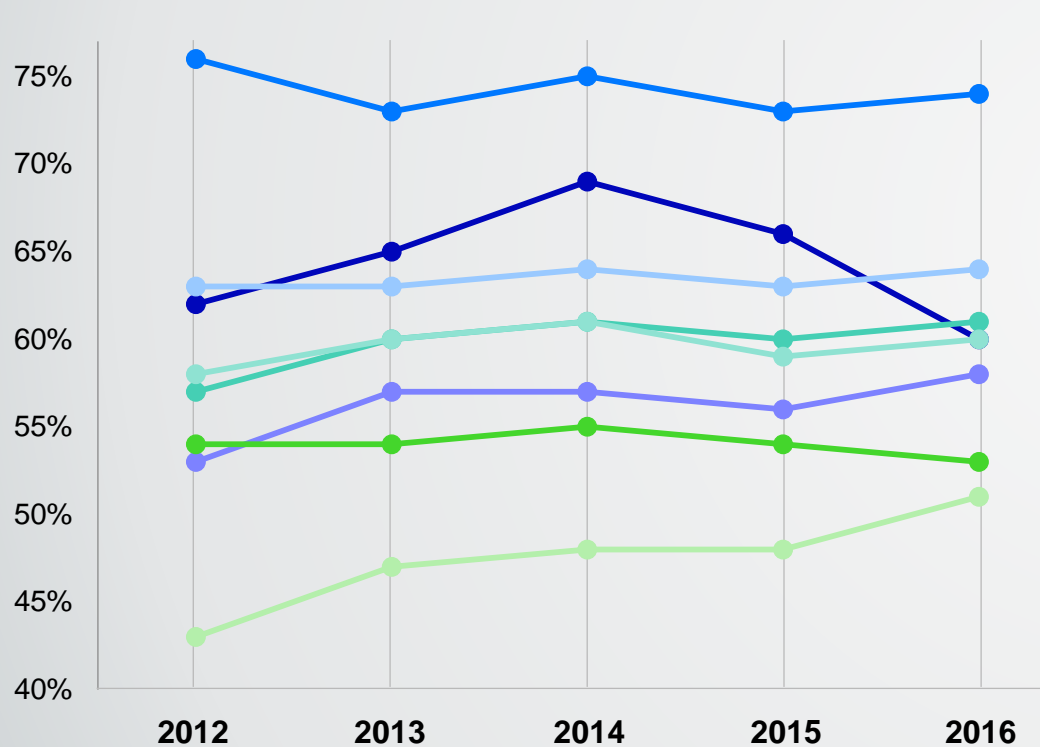
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GDP 5 = U.S., China, Japan, Germany, U.K.

Sector Trends: Financial Services Rebounds

Trust in each industry sector, 2012-2016

▲ General Population



Industry	2012	2013	2014	2015	2016	5 yr. Trend
Technology	76%	73%	75%	73%	74%	▼ 2
Food & Beverage	63%	63%	64%	63%	64%	▲ 1
Consumer Packaged Goods	57%	60%	61%	60%	61%	▲ 4
Telecommunications	58%	60%	61%	59%	60%	▲ 2
Automotive	62%	65%	69%	66%	60%	▼ 2
Energy	53%	57%	57%	56%	58%	▲ 5
Pharmaceutical	54%	54%	55%	54%	53%	▼ 1
Financial Services	43%	47%	48%	48%	51%	▲ 8

Source: 2016 Edelman Trust Barometer Q45-429. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please 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) General Population, 25-country global total. *From 2012-2014, Pharma included as subsector(Q). **From 2012-2015, Pharma included as an industry sector (Q43-60). 2012-2014 data recalibrated as a sector.

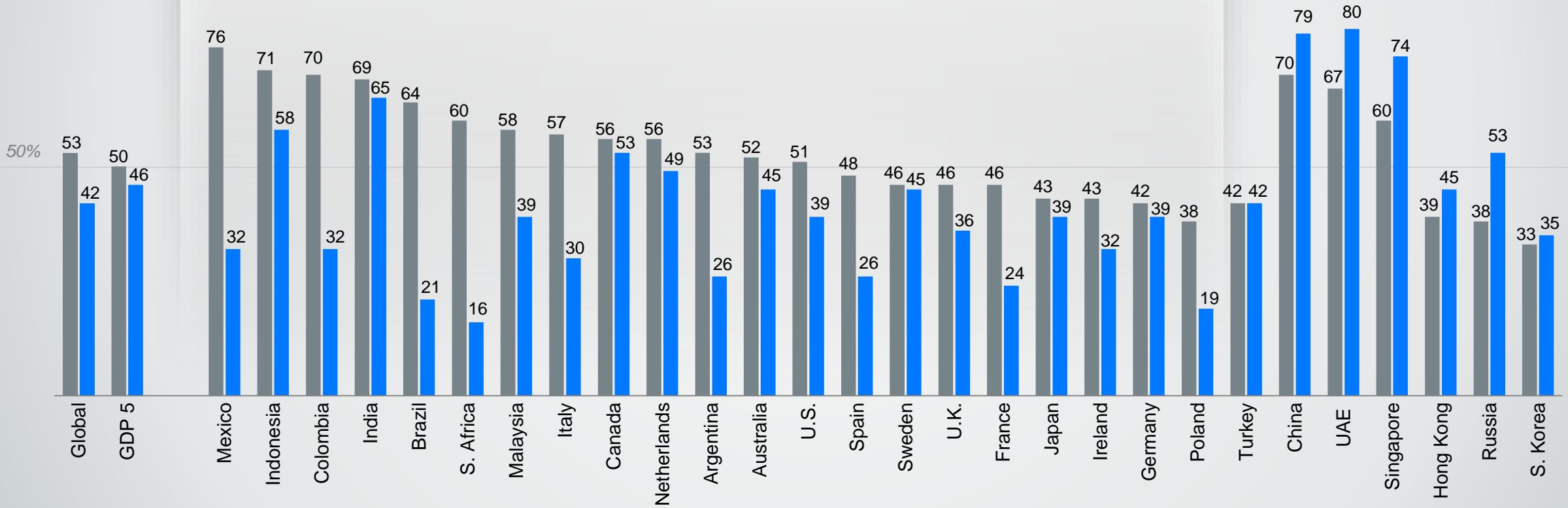
Business vs. Government

Percent trust in business vs. government, 2016, ranked by trust in business

▲ General Population

Business Government

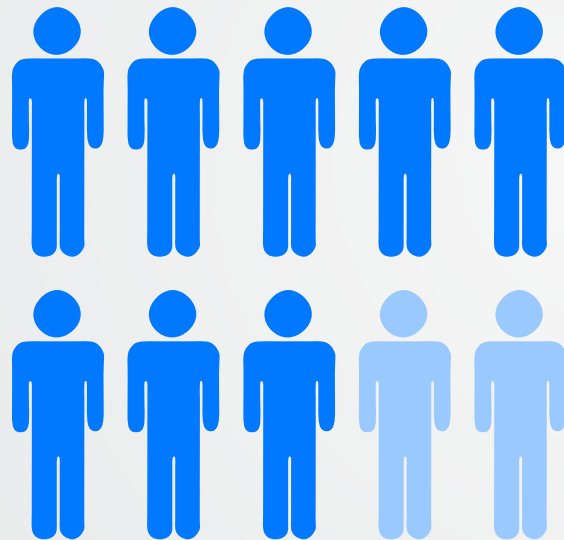
Higher trust in business in 21 countries



Source: 2016 Edelman Trust Barometer Q11-14. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, 28-country global total.

GDP 5 = U.S., China, Japan, Germany, U.K.

Business Must Lead to Solve Problems



80% agree

▲ up from 74% in 2015

“A company can take specific actions that both increase profits and improve the economic and social conditions in the community where it operates.”

Societal Expectations Vary

Most important issue for business to address in each country



- E** Access to education/training
- I** Address income inequality
- H** Access to healthcare
- E** Protecting/improving the environment
- P** Reducing poverty
- R** Supporting human & civil rights
- I** Modern infrastructure

Source: 2016 Edelman Trust Barometer Q561-573 Thinking about businesses in your country, how important is it that they play a role in solving each of the following societal issues? Please use a nine-point scale where one means that it is "not at all important" and nine means that it is "extremely important". (Top 4 Box, Importance) General Population, 28-country global total, question asked of one quarter the sample.

A man with a beard and mustache, wearing a dark suit jacket, white shirt, and dark tie, is smiling broadly while holding a red tablet computer with both hands. He is standing in an office environment with large windows in the background showing a cityscape. To his left is a large, dark monitor. On a desk in the foreground, there is a spiral notebook, a pen holder, and a small black box.

Thank You

View the full global results at www.edelman.com/trust2016