Edelman

Edelman trustbarometer 2014 | ANNUAL GLOBAL STUDY

2014

EDELMAN TRUST BAROMETER

IRELAND RESULTS

Edelman's 14th annual survey

ONLINE SURVEY IN 27 COUNTRIES

- 33,000 respondents
- 6 years in 20+ markets
- 9 years in 10+ markets

GENERAL POPULATION

- 1000 respondents per country surveyed
- Ages 18+
- 3 years in 25+ markets

INFORMED PUBLICS

- 500 respondents in U.S. and China & 200 in other countries
- 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 and public policy
- 14 years of data

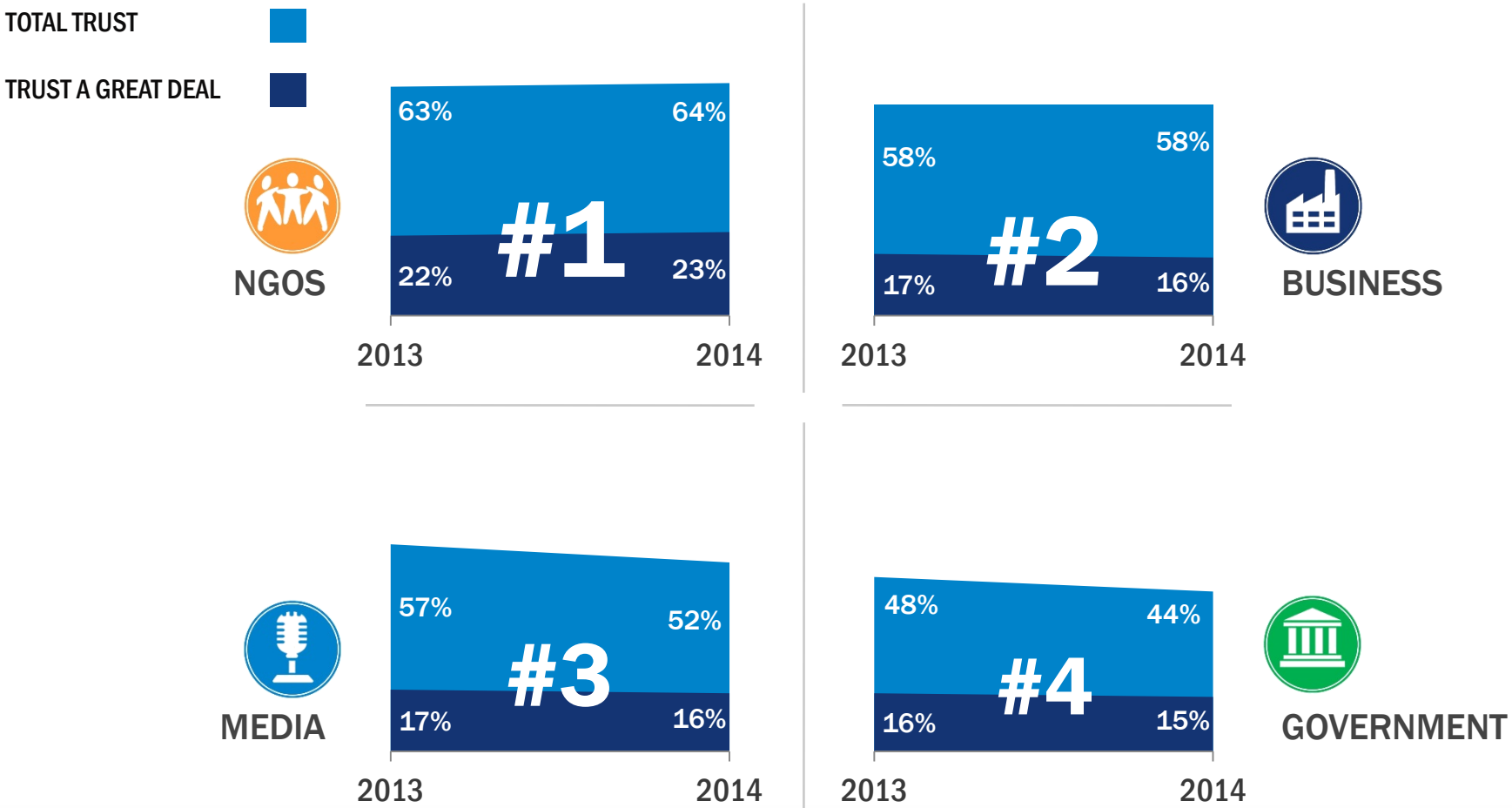
Edelman trust barometer in retrospect

2014	**BUSINESS TO LEAD THE DEBATE FOR CHANGE**
2013	CRISIS OF LEADERSHIP
2012	FALL OF GOVERNMENT
2011	RISE OF AUTHORITY FIGURES
2010	TRUST IS NOW AN ESSENTIAL LINE OF BUSINESS
2009	BUSINESS MUST PARTNER WITH GOVERNMENT TO REGAIN TRUST
2008	YOUNG INFLUENCERS HAVE MORE TRUST IN BUSINESS
2007	BUSINESS MORE TRUSTED THAN GOVERNMENT AND MEDIA
2006	“A PERSON LIKE ME” EMERGES AS CREDIBLE SPOKESPERSON
2005	TRUST SHIFTS FROM “AUTHORITIES” TO PEERS
2004	U.S. COMPANIES IN EUROPE SUFFER TRUST DISCOUNT
2003	EARNED MEDIA MORE CREDIBLE THAN ADVERTISING
2002	FALL OF THE CELEBRITY CEO
	RISING INFLUENCE OF NGOS

ONE | The State of Trust

GLOBAL TRUST IN BUSINESS AND NGOs REMAINS STABLE, TRUST IN GOVERNMENT AND MEDIA DECREASES

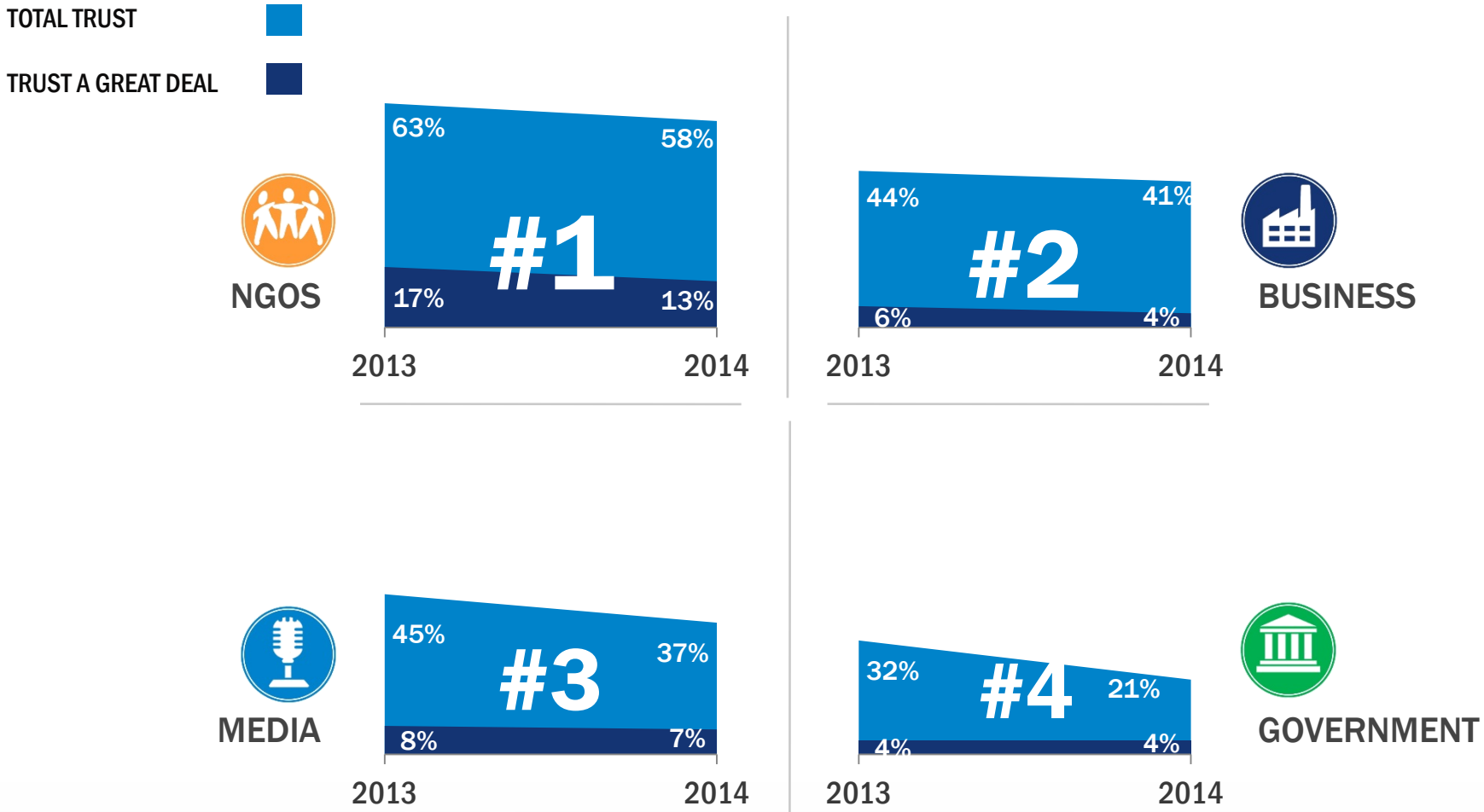
TRUST IN THE FOUR INSTITUTIONS OF GOVERNMENT, BUSINESS, MEDIA AND NGOS, 2013 VS. 2014



Q11-14. [TRACKING] Below is a list of institutions. For each one, please indicate how much you trust that institution 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 2 Box, Trust a great deal and Top 4 Box, Trust) Informed Publics in 20-country global total.

IN IRELAND TRUST IN ALL INSTITUTIONS DECLINES

IRELAND TRUST IN THE FOUR INSTITUTIONS: GOVERNMENT, BUSINESS, MEDIA AND NGOS, 2013 VS. 2014



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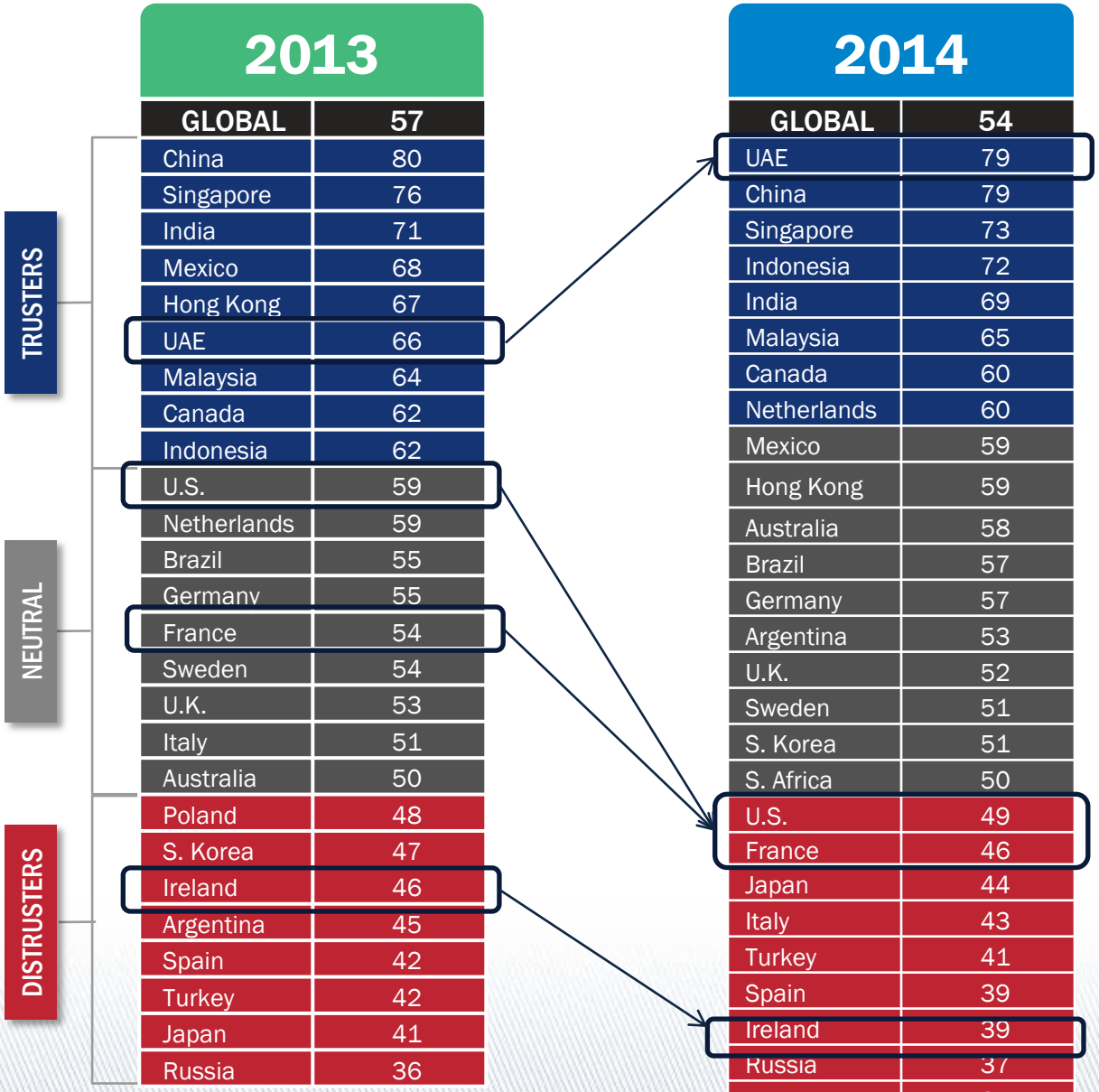
THE TRUST INDEX: SLIGHT DECLINE IN TRUST OVER THE PAST YEAR WITH STRONG REGIONAL VARIATIONS; MAJOR DECLINES IN POLAND, U.S. & MEXICO

INFORMED PUBLIC



BIG TRUST INCREASES FROM 2013

UAE +13 pts.
Indonesia +10 pts.
Australia + 8 pts.
Argentina + 8 pts.

BIG TRUST DECREASES FROM 2013

Poland -13 pts.
U.S. -10 pts.
Mexico -9 pts.

Trust Index is an average of a country's trust in the four institutions of government, business, media and NGOs. 20-country global total (does not include Argentina, Hong Kong, Malaysia, Singapore, South Africa, Turkey, UAE).

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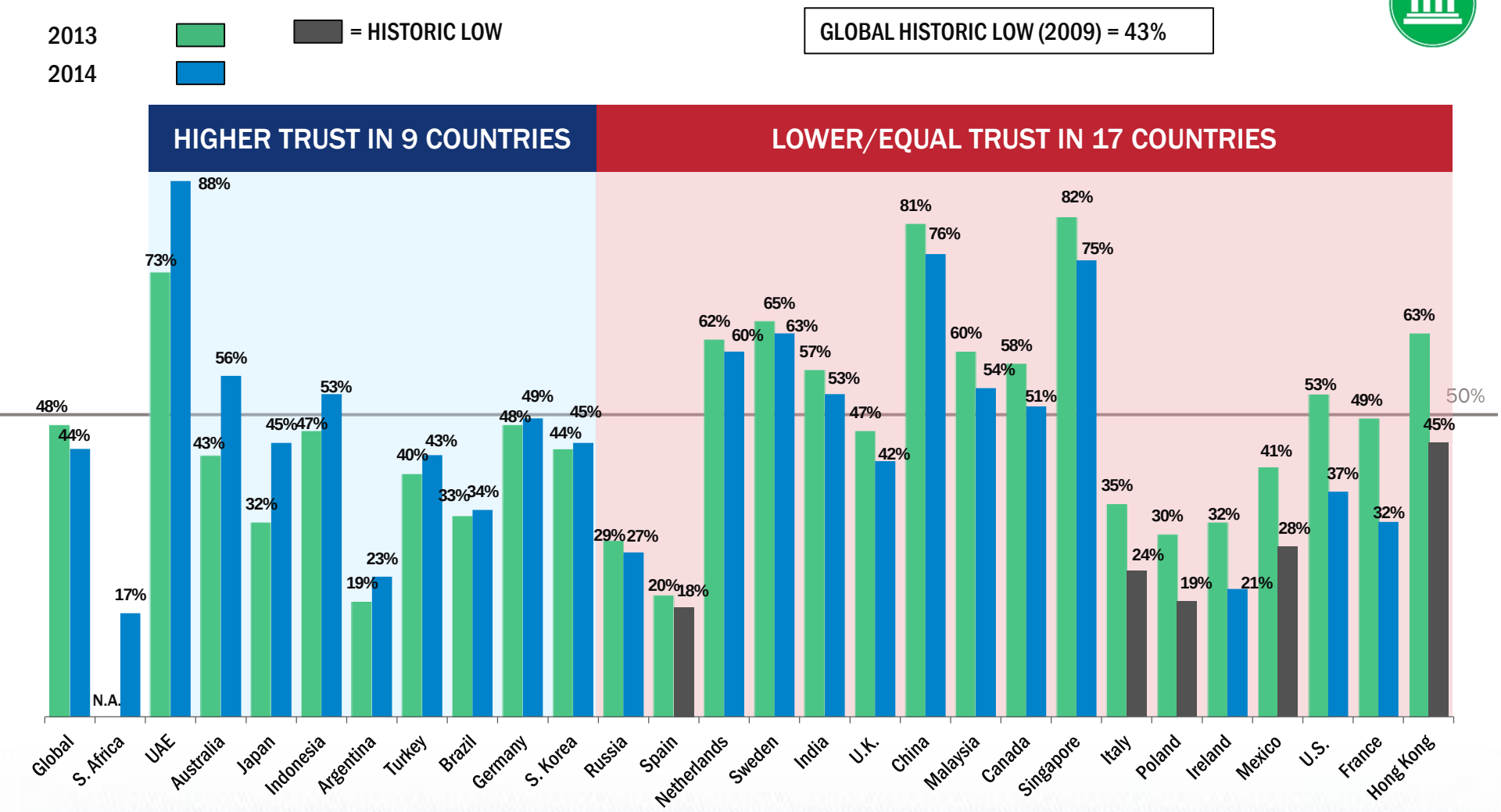
SIGNIFICANT TRUST DECLINE FOR GOVERNMENT; LARGEST TRUST DROPS IN U.S., FRANCE AND HONG KONG

TRUST IN GOVERNMENT, 2013 VS. 2014



Q11-14. [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 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) Informed Publics, 20-country global total.

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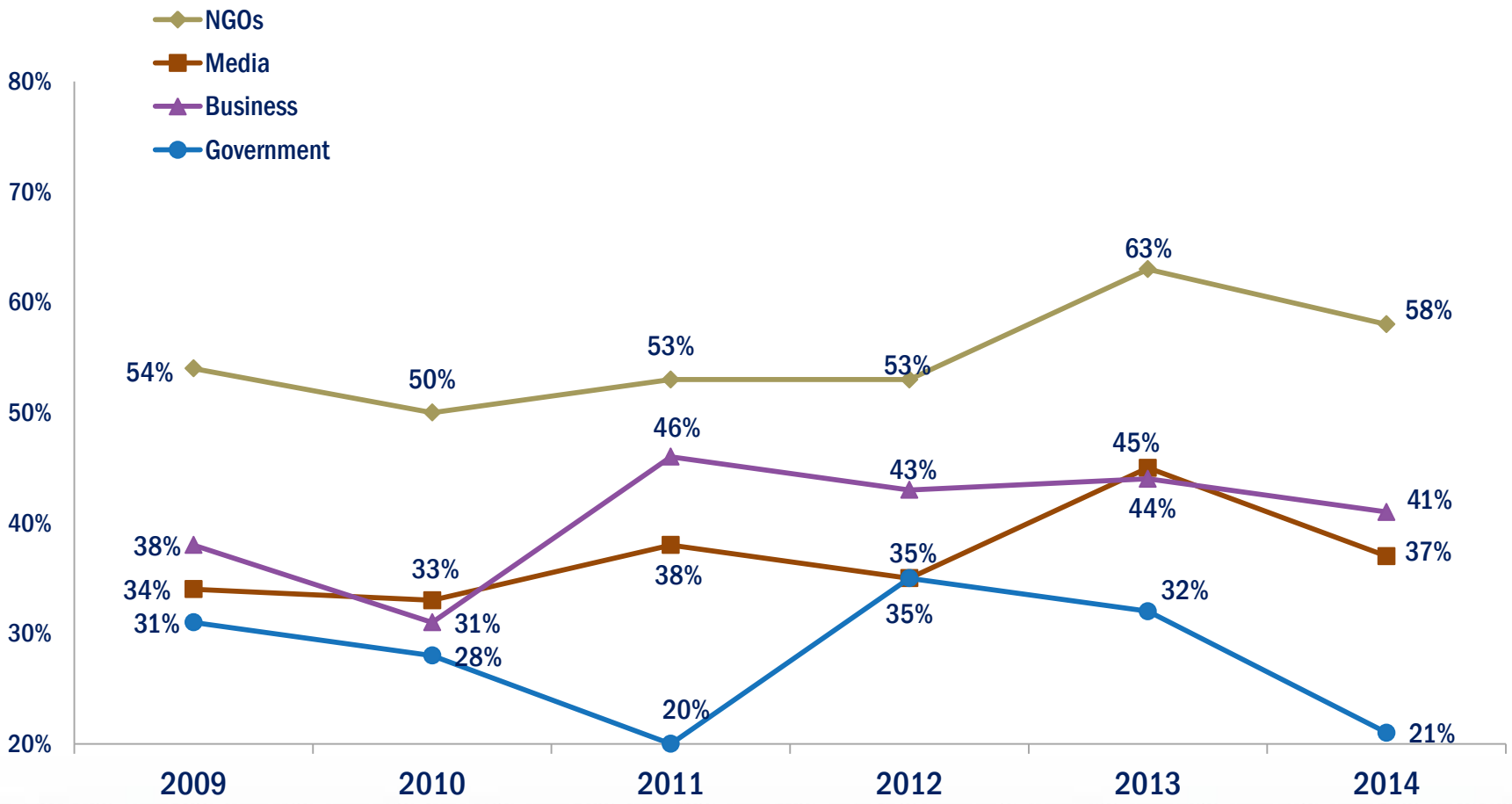
IN IRELAND TRUST IN GOVERNMENT FALLS BACK TO PRE-ELECTION LEVELS

IRELAND TRUST IN THE FOUR INSTITUTIONS SINCE 2009



Q11-14. [TRACKING] Below is a list of institutions. For each one, please indicate how much you trust that institution 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'. (4 Box, Trust) Informed Publics.

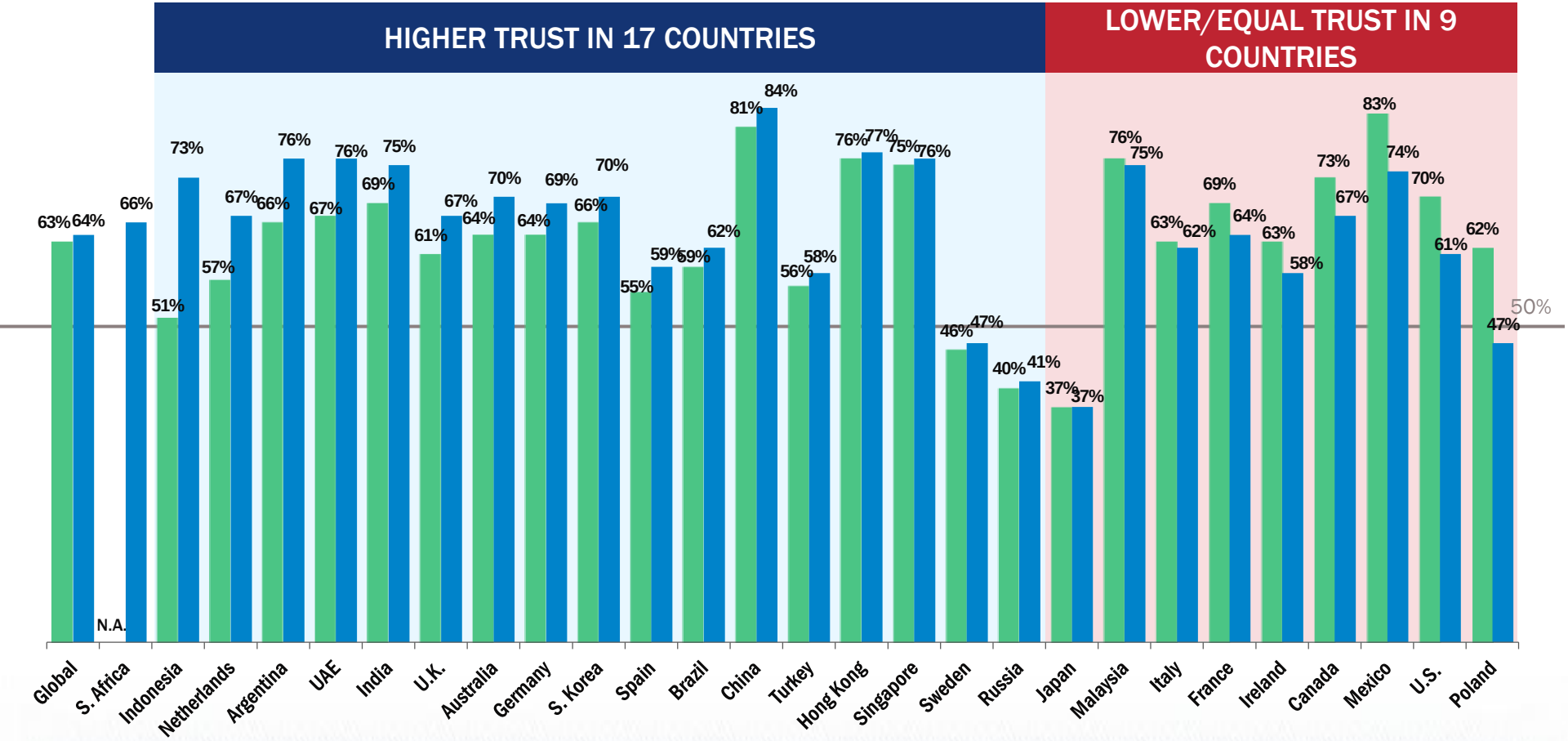
TRUST IN NGOS ON THE RISE, WITH MAJORITY OF MARKETS AT OR ABOVE 60% TRUST LEVEL

TRUST IN NON-GOVERNMENTAL ORGANIZATIONS (NGOS), 2013 VS. 2014

INFORMED PUBLIC

2013
2014

NGOs most trusted institution in 20 of the 27 countries surveyed in 2014



Q11-14. [NON-GOVERNMENTAL ORGANIZATIONS] Below is a list of institutions. For each one, please indicate how much you trust that institution 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) Informed Publics, 20-country global total.

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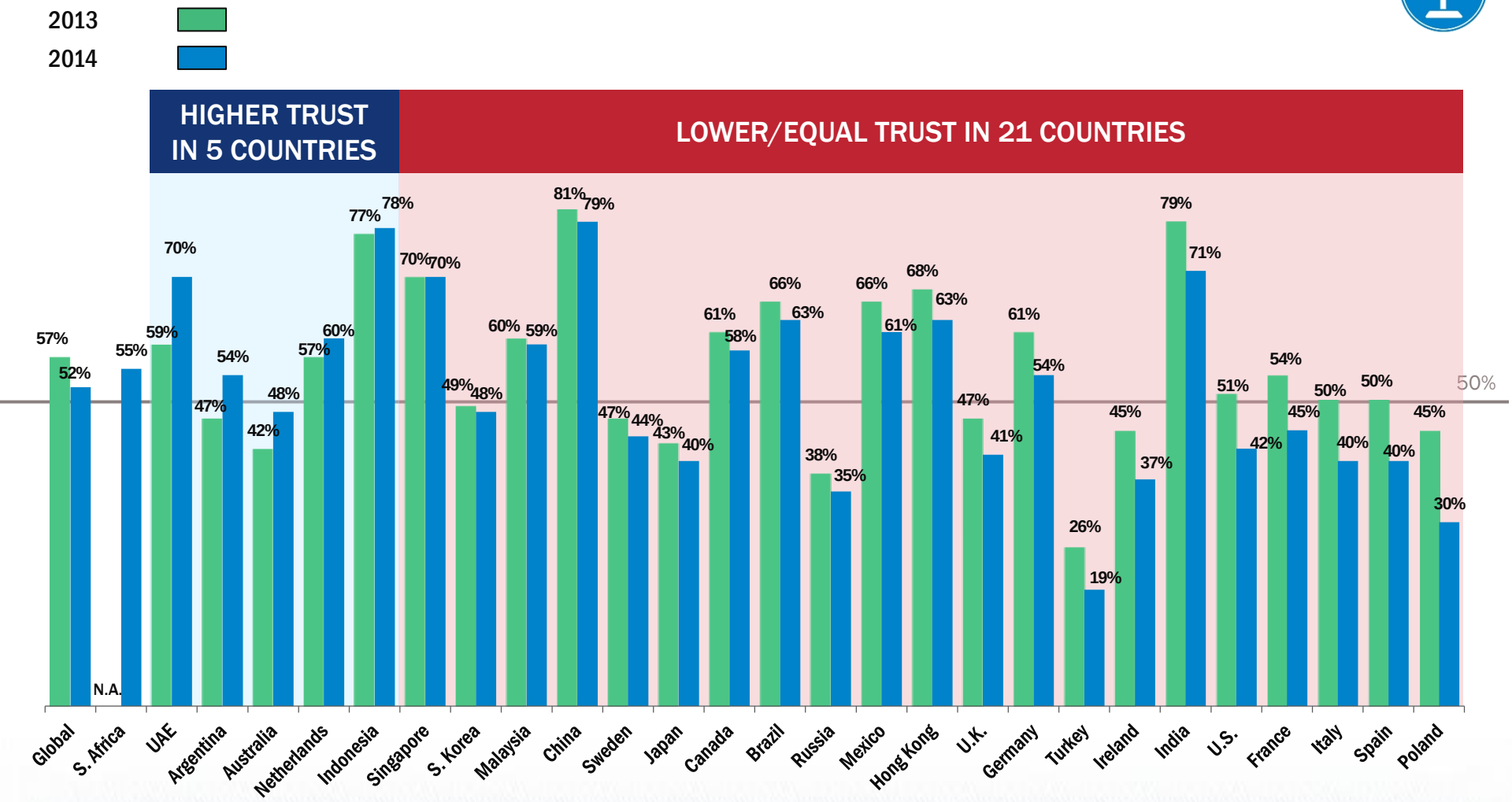
GLOBAL TRUST IN MEDIA REVERTS TO 2010 LEVELS; NEARLY 80% OF COUNTRIES REPORT TRUSTING MEDIA LESS OVER THE LAST YEAR

TRUST IN MEDIA, 2013 VS. 2014

INFORMED PUBLIC



Q11-14. [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 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) Informed Publics, 20-country global total.

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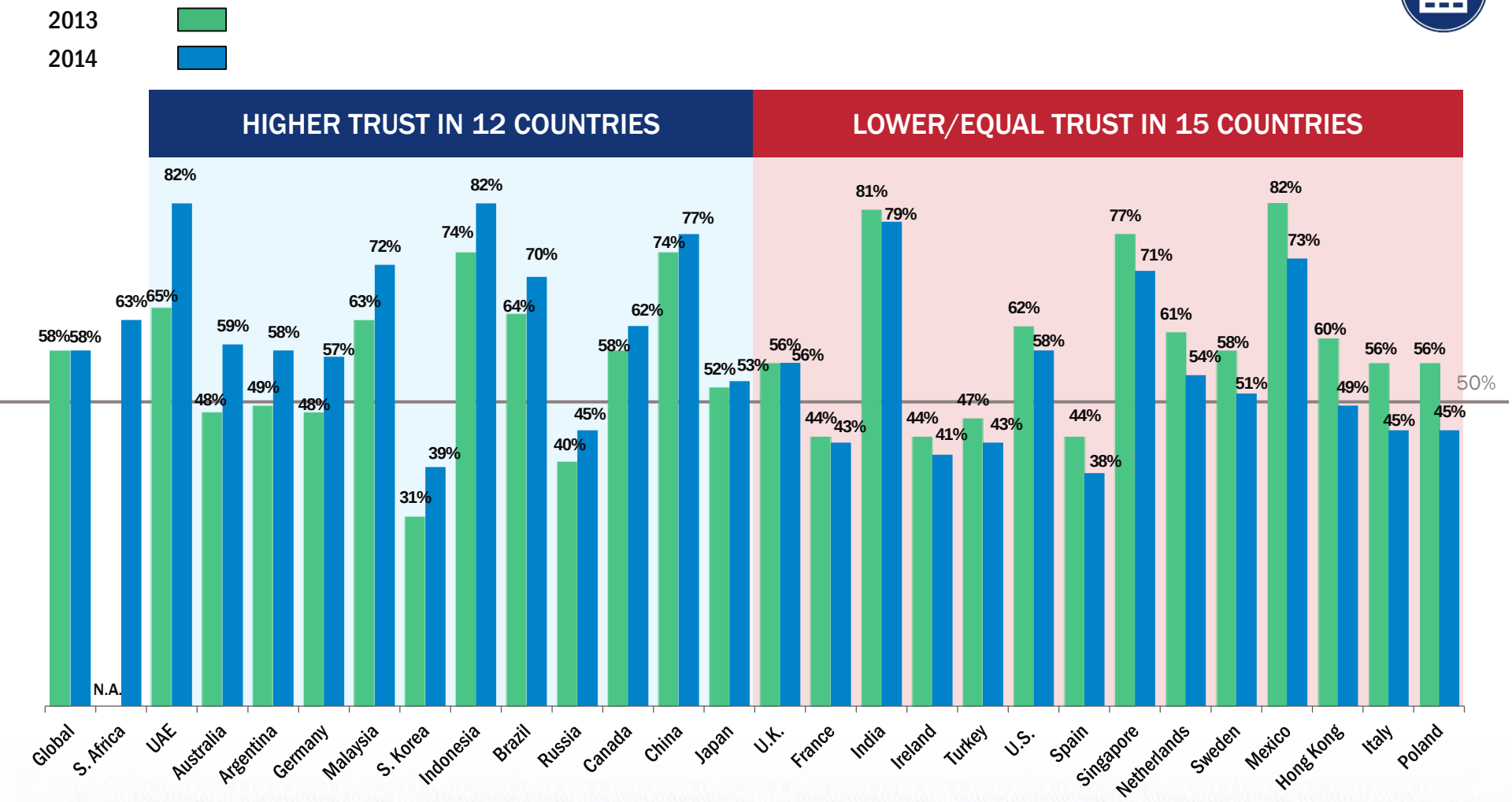
TRUST IN BUSINESS STABILIZES; WESTERN SKEPTICISM ENTRENCHED, DEVELOPING MARKETS SOAR

TRUST IN BUSINESS, 2013 VS. 2014

INFORMED PUBLIC



Q11-14. [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 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) Informed Publics, 20-country global total.

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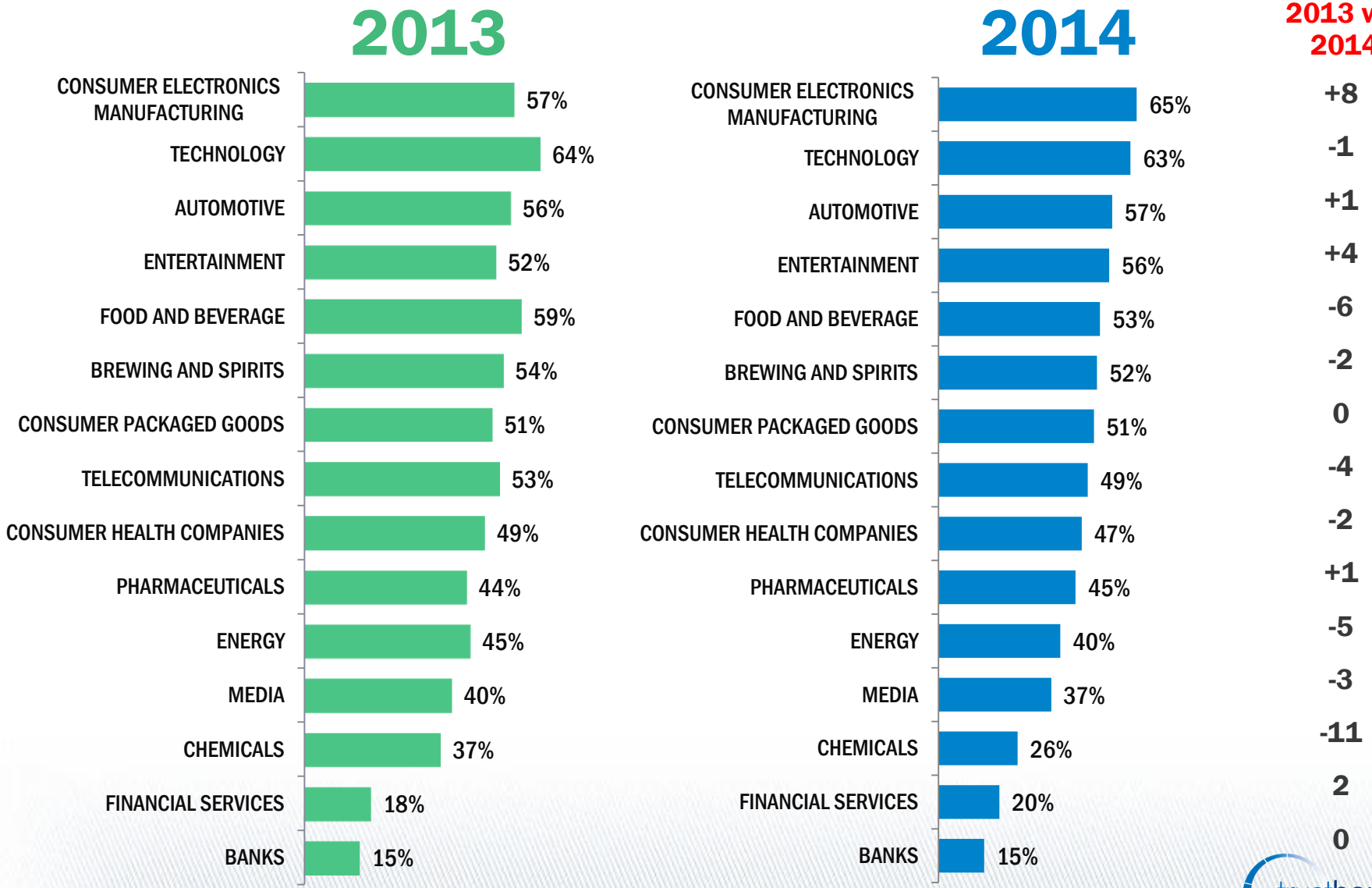
TWO | Who is trusted?

WHICH INDUSTRIES ARE THE MOST TRUSTED?

TRUST IN INDUSTRIES, 2013 VS. 2014 - IRELAND



Q43-60. [TRACKING] 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) Informed Publics.

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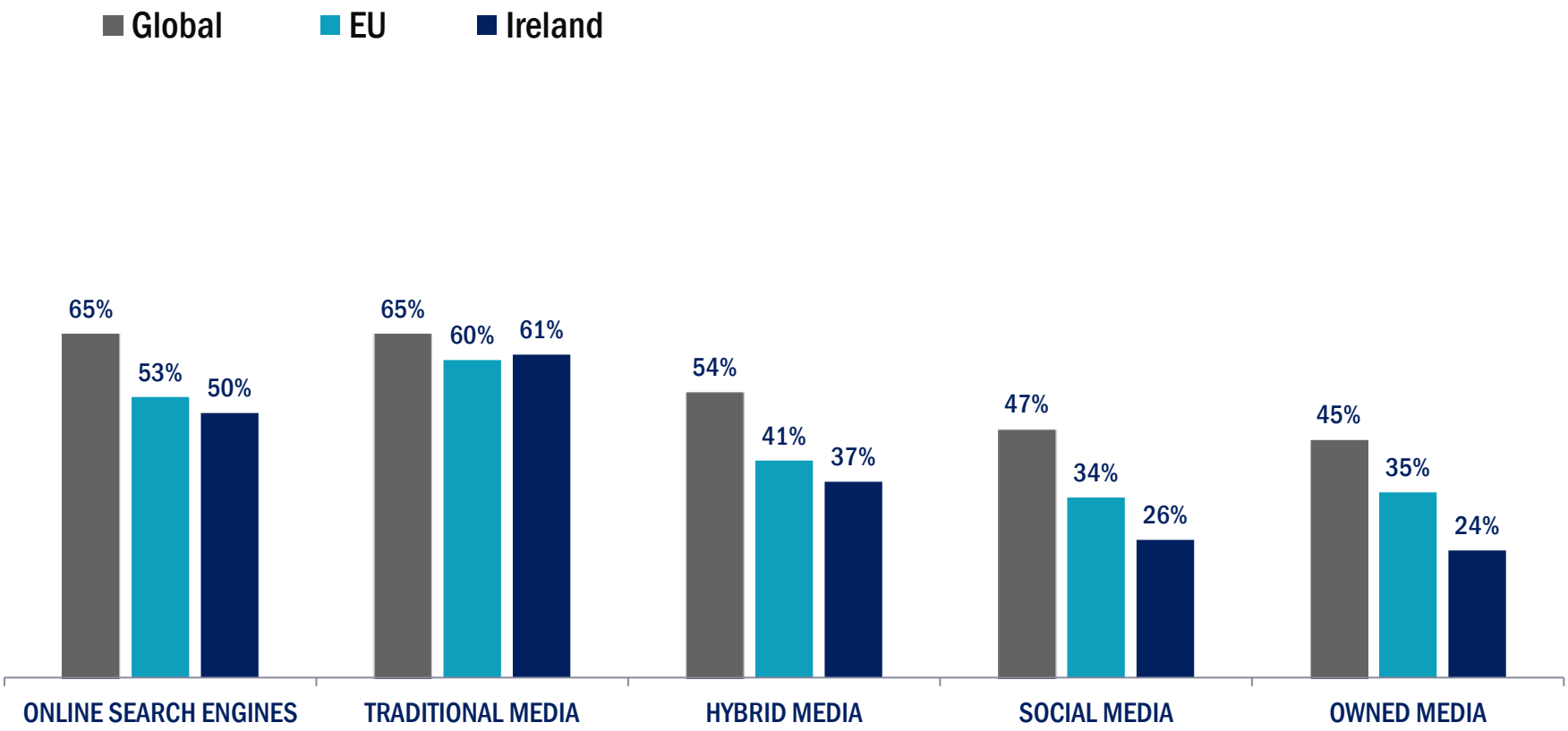
TRUST IN TYPES OF MEDIA

IRELAND TRUST IN DIFFERENT SOURCES OF INFORMATION

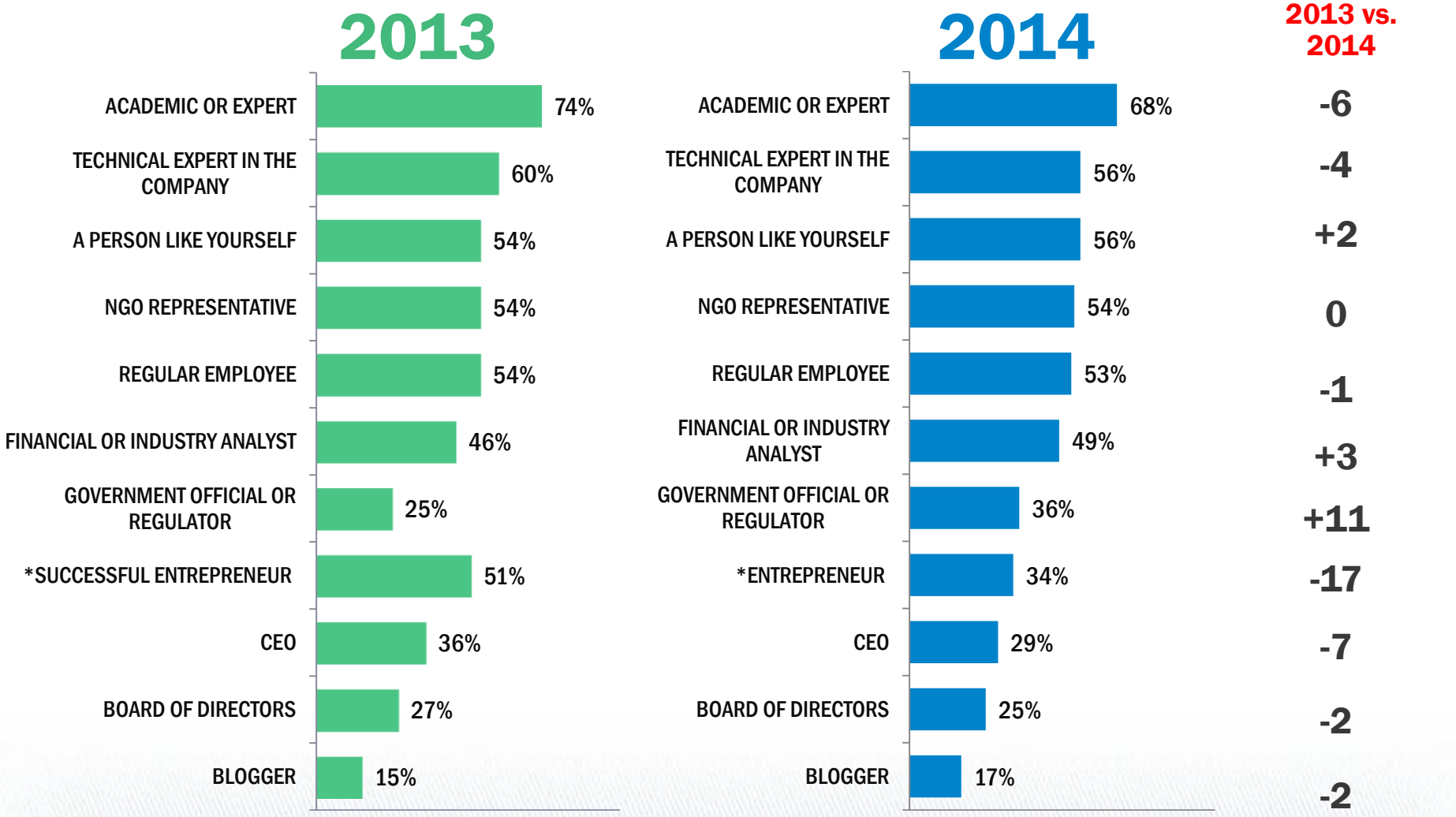


Q178-182. [TRACKING] When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal". (Top 4 Box, Trust) Informed Publics.

WHO ARE THE MOST TRUSTED SPOKESPEOPLE?

CREDIBILITY OF SPOKESPEOPLE , 2013 VS. 2014 - IRELAND

INFORMED PUBLIC

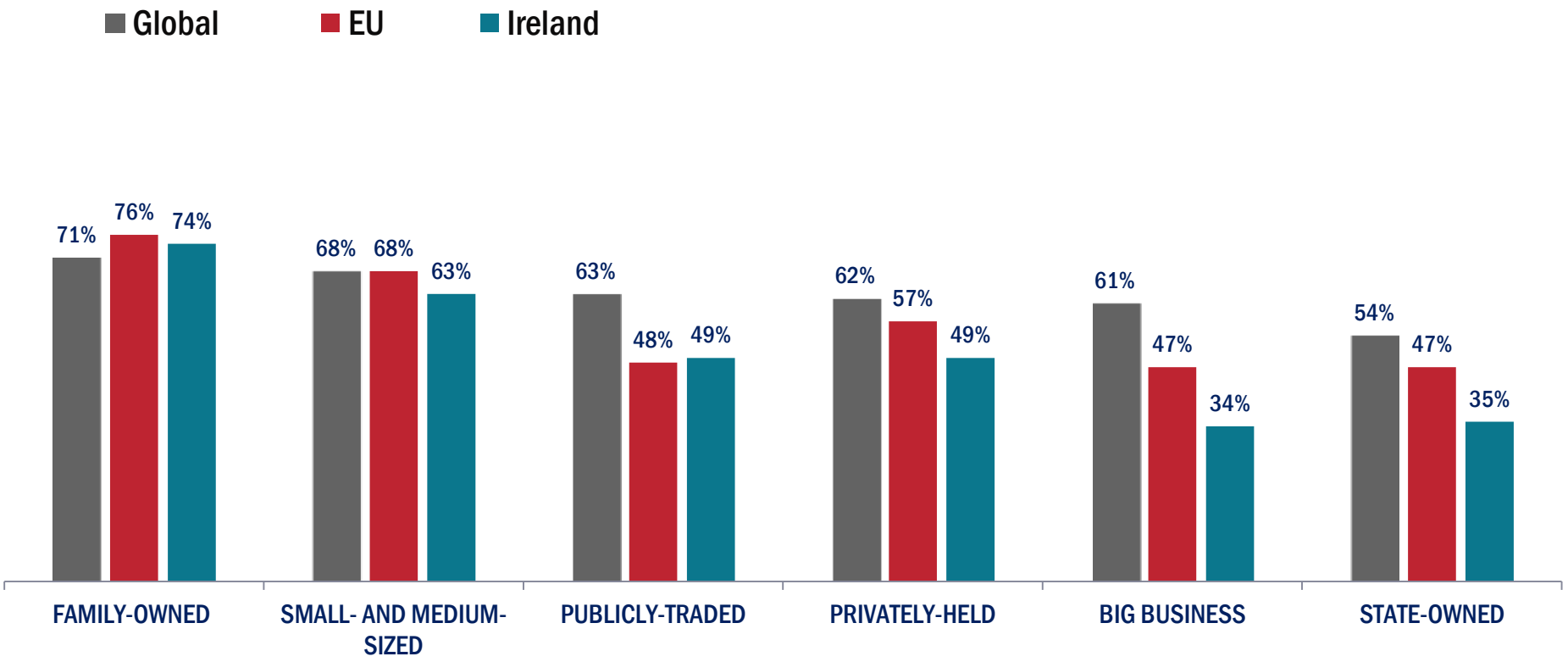


*Changed from "Successful Entrepreneur" in 2013

Q130-143. [TRACKING] 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) Informed Publics.

TRUST IN TYPES OF BUSINESS

IRELAND TRUST IN DIFFERENT TYPES OF BUSINESSES



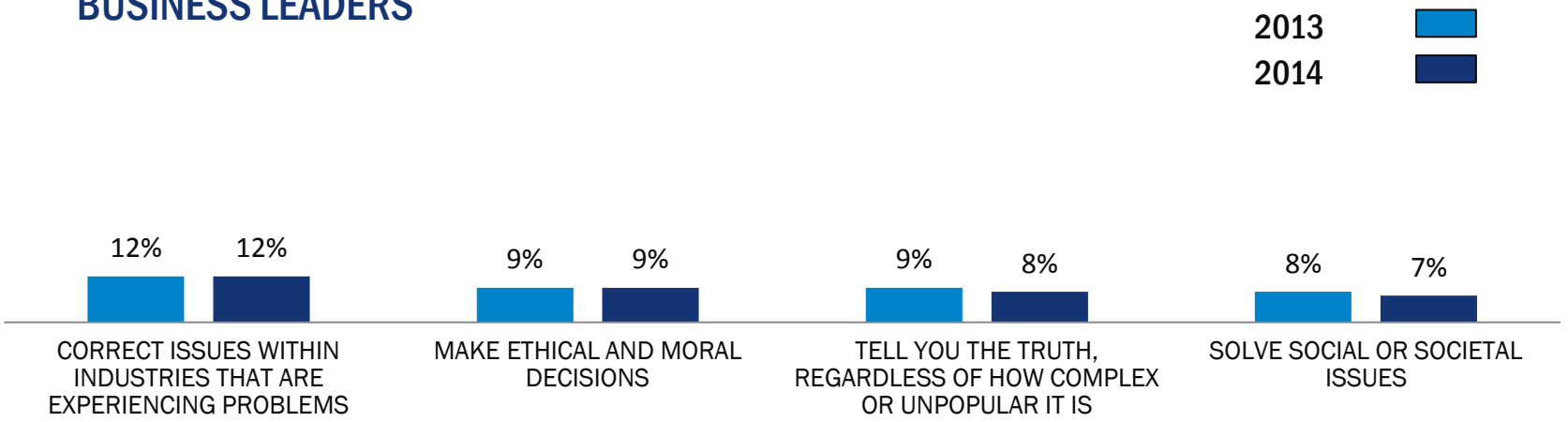
Q15-17C. Thinking about different types of businesses, please indicate how much you trust each type of business to do what is right using a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". (Top 4 Box, Trust) Informed Publics.

LEADERSHIP – A CRISIS OF TRUST

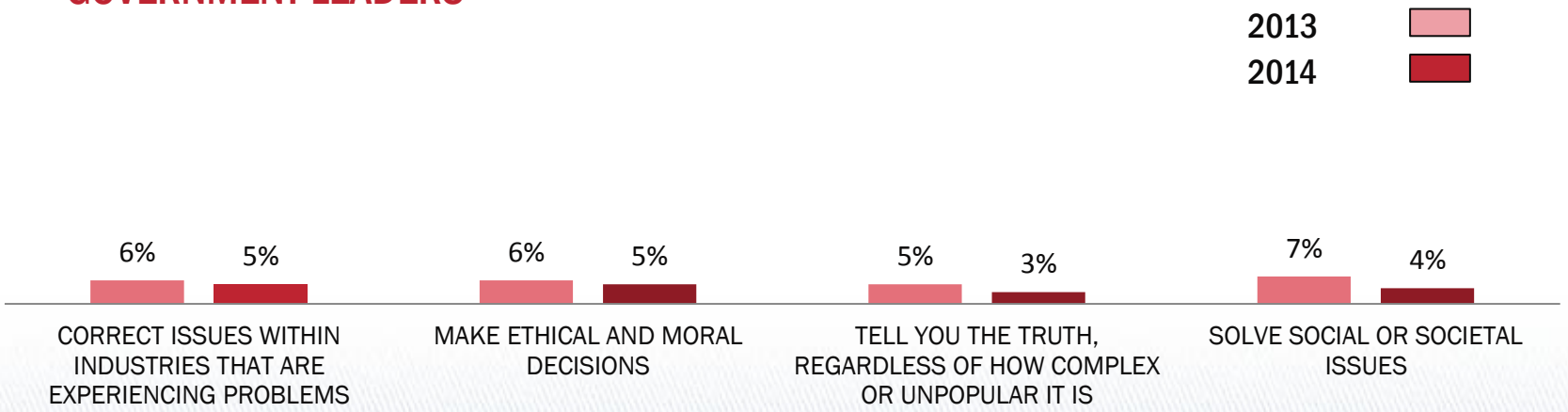
IRELAND TRUST IN BUSINESS AND GOVERNMENT LEADERS TO DO THE FOLLOWING

GENERAL PUBLIC

BUSINESS LEADERS



GOVERNMENT LEADERS



Q144A-147A. [SPLIT SAMPLE] How much do you trust business leaders to do the following?; Q144B-147B. [SPLIT SAMPLE] How much do you trust government leaders to do the following? (Top Box, Trust a great deal) General Publics.

THREE | Building Trust

16 KEY ATTRIBUTES TO BUILDING TRUST

Edelman Trust Barometer research reveals **16 specific attributes** which build trust.

These can be grouped into **five performance clusters** listed here in rank order of importance.

ENGAGEMENT

- LISTENS TO CUSTOMER NEEDS AND FEEDBACK
- TREATS EMPLOYEES WELL
- PLACES CUSTOMERS AHEAD OF PROFITS
- COMMUNICATES FREQUENTLY AND HONESTLY ON THE STATE OF ITS BUSINESS

INTEGRITY

- HAS ETHICAL BUSINESS PRACTICES
- TAKES RESPONSIBLE ACTIONS TO ADDRESS AN ISSUE OR CRISIS
- HAS TRANSPARENT AND OPEN BUSINESS PRACTICES

PRODUCTS & SERVICES

- OFFERS HIGH QUALITY PRODUCTS OR SERVICES
- IS AN INNOVATOR OF NEW PRODUCTS, SERVICES OR IDEAS

PURPOSE

- WORKS TO PROTECT AND IMPROVE THE ENVIRONMENT
- ADDRESSES SOCIETY'S NEEDS IN ITS EVERYDAY BUSINESS
- CREATES PROGRAMS THAT POSITIVELY IMPACT THE LOCAL COMMUNITY
- PARTNERS WITH NGOs, GOVERNMENT AND 3RD PARTIES TO ADDRESS SOCIETAL NEEDS

OPERATIONS

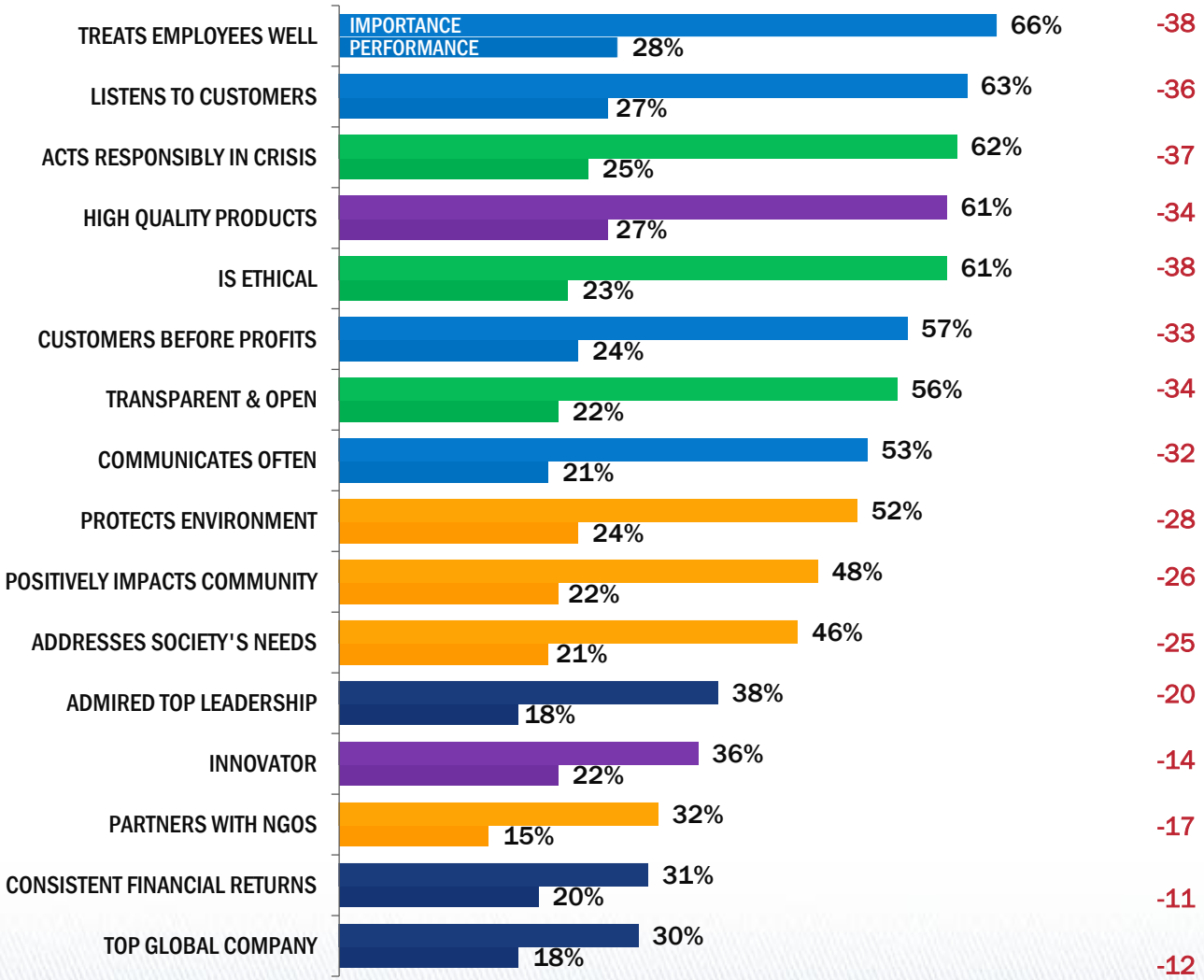
- HAS HIGHLY-REGARDED AND WIDELY ADMIRED TOP LEADERSHIP
- RANKS ON A GLOBAL LIST OF TOP COMPANIES
- DELIVERS CONSISTENT FINANCIAL RETURNS TO INVESTORS

EXPECTATION VERSUS DELIVERY

BUSINESS IMPORTANCE VS. BUSINESS PERFORMANCE ON 16 TRUST DRIVERS - IRELAND

GENERAL PUBLIC

ENGAGEMENT
INTEGRITY
PRODUCTS & SERVICES
PURPOSE
OPERATIONS

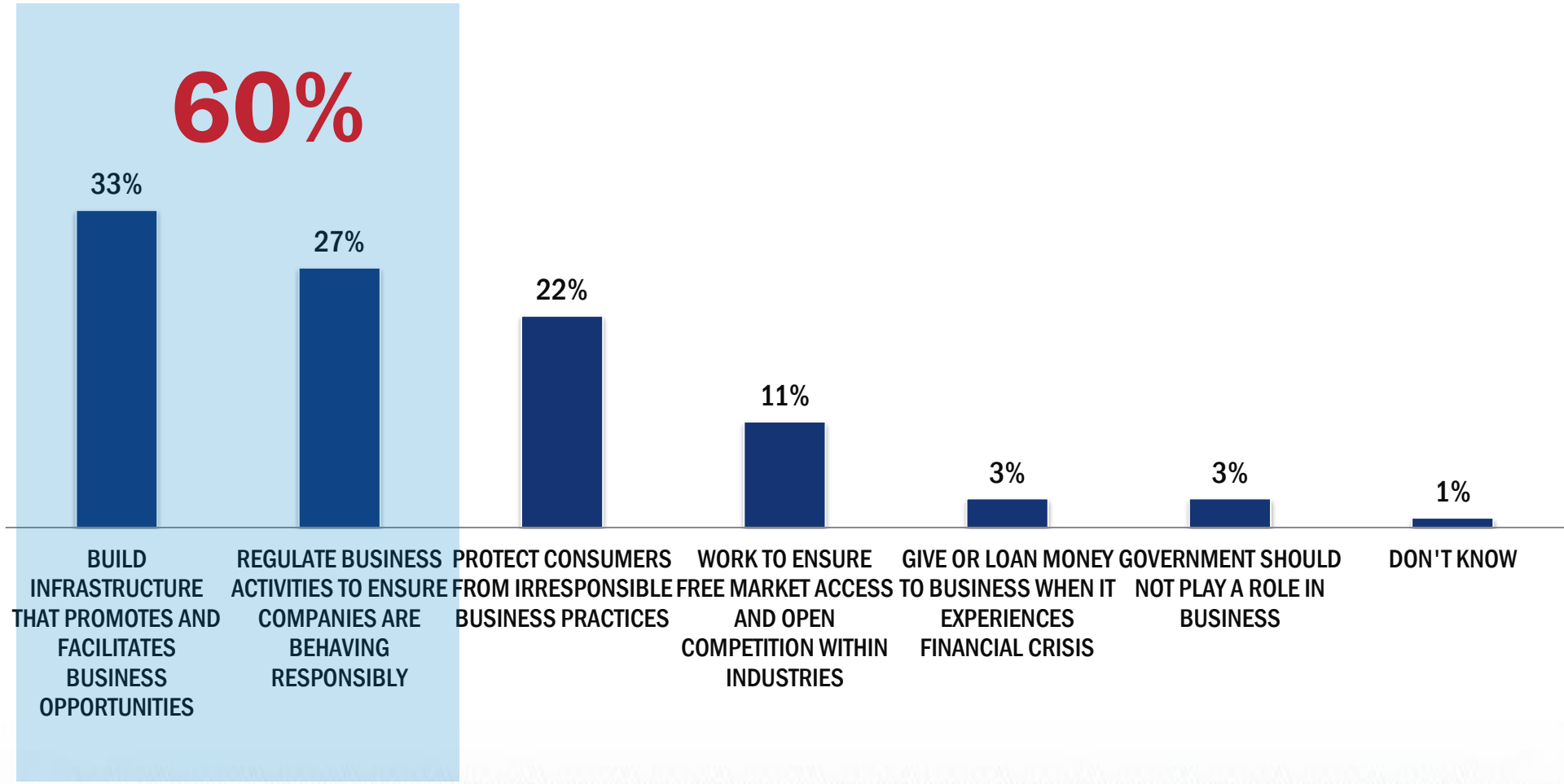


Q80-Q95. [TRACKING] How important is each of the following actions to building your TRUST in a company? Use a nine-point scale where one means that action is "not at all important to building your trust" and nine means it is "extremely important to building your trust" in a company. (Top 2 Box, Very/Extremely Important) Informed Publics, 27-country global total.; Q114-129. Please rate businesses in general on how well you think they are performing on each of the following attributes. Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". (Top 2 Box, Performing Extremely Well) Informed Publics.

WHAT ROLE SHOULD GOVERNMENT PLAY IN BUSINESS?

MOST IMPORTANT ROLE FOR GOVERNMENT IN BUSINESS - IRELAND

INFORMED PUBLIC



Q149. [TRACKING] Which of the following is the most important role that government should play in business? Informed Publics.

SHOULD BUSINESS HAVE A ROLE IN POLICY DEVELOPMENT?

PERCENTAGE AGREEING WITH EACH OF THE FOLLOWING STATEMENTS - IRELAND

INFORMED PUBLIC

When policymakers are developing new regulations on businesses and industries, they should consult with multiple stakeholders (i.e. NGOs, academics, the affected businesses/industries, etc.) before making final decisions

75%

The food and beverage industry should be a more active participant in the broader debate in Ireland over solutions to food and nutrition policy issues

68%

The energy industry should be a more active participant in the broader debate over Ireland energy policy

65%

The financial services industry should be a more active participant in the broader debate over the future of the Ireland banking system

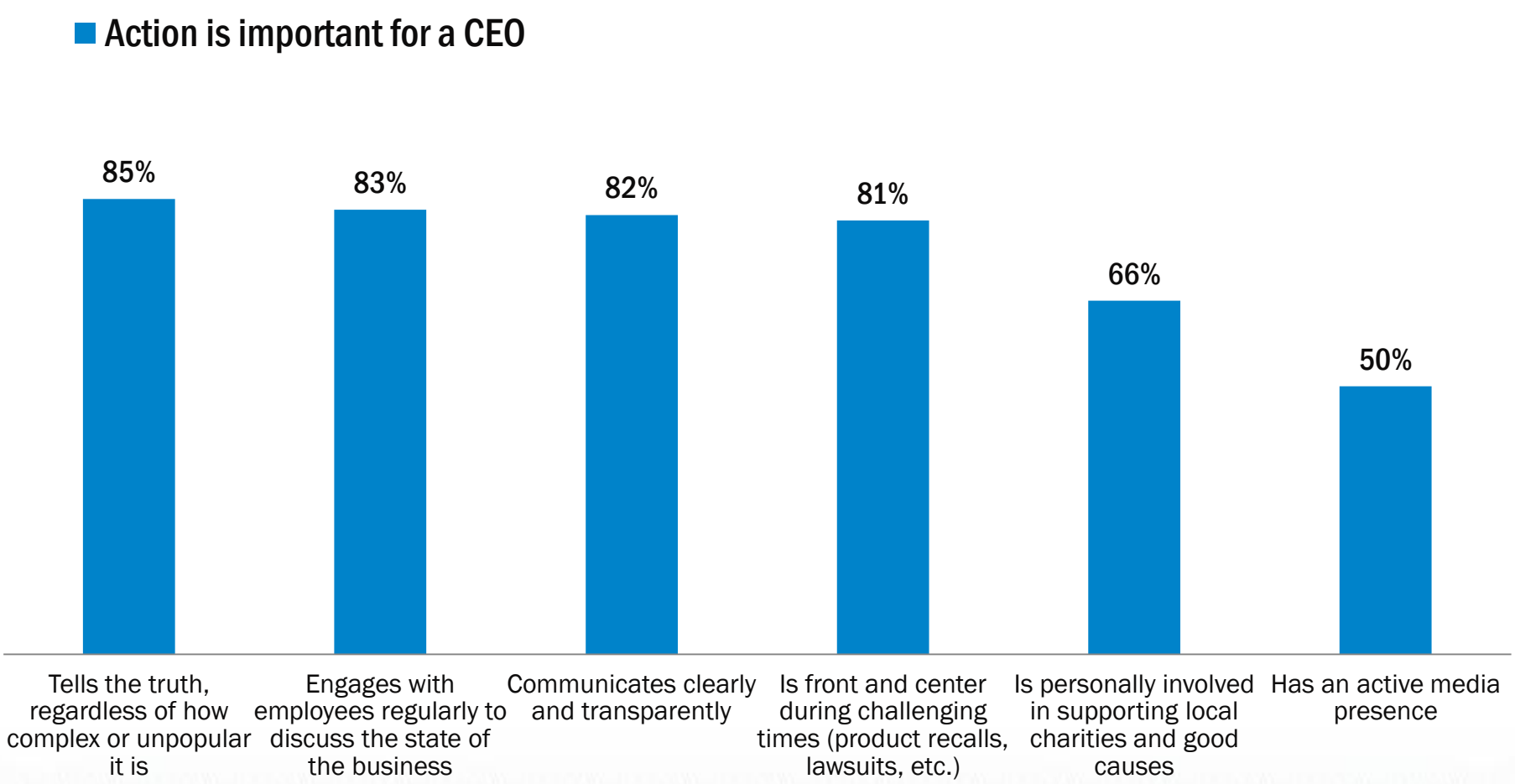
56%

Q265-270. Please indicate how much you agree or disagree with the following statements? Informed Publics.

WHAT CEOs SHOULD DO TO BUILD TRUST

ACTIONS A CEO CAN TAKE TO BUILD TRUST IN THEMSELVES AND THEIR COMPANY - IRELAND

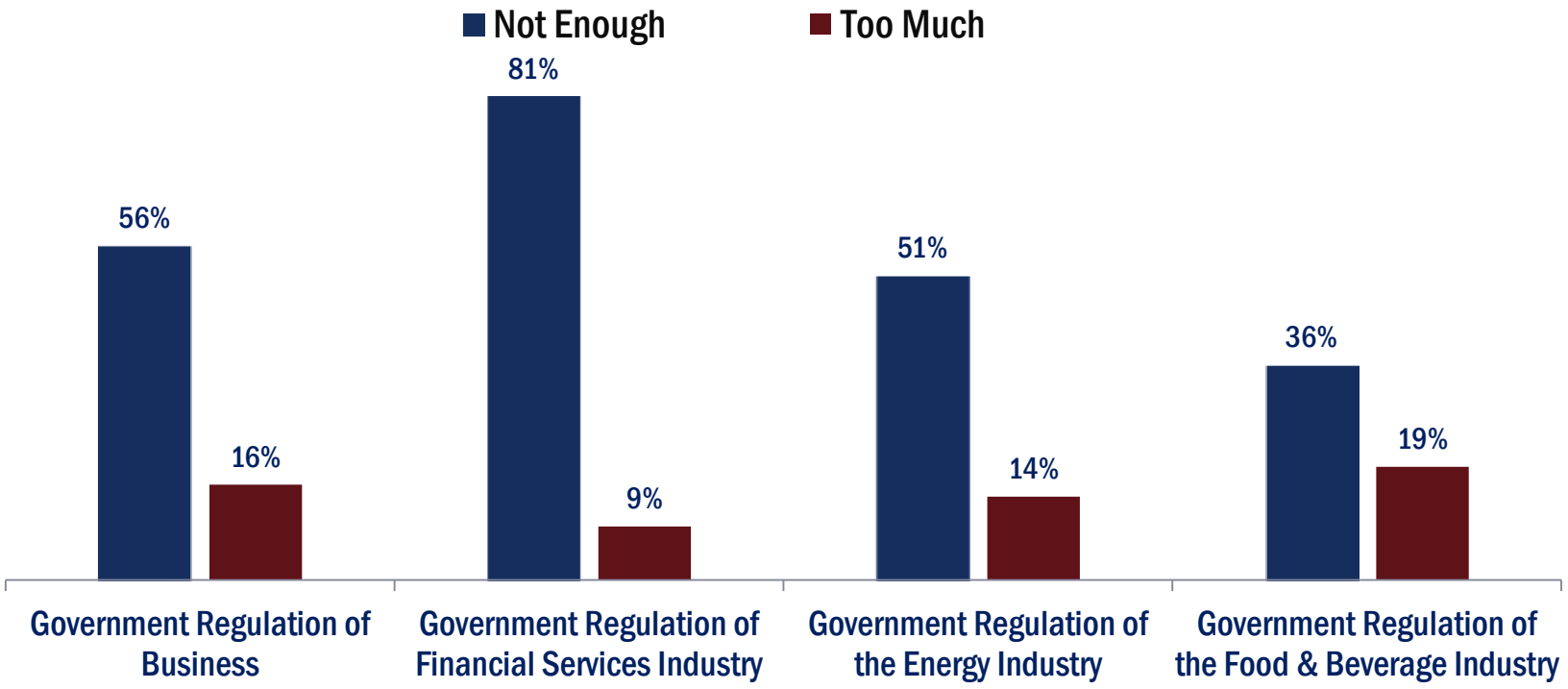
GENERAL PUBLIC



Q254A-261A. [SPLIT SAMPLE] Thinking about the following actions a CEO can take, how important is each of the following to building your TRUST in that CEO? (Top 4 Box, Total Important) Informed Publics.

IS GOVERNMENT DOING ENOUGH TO REGULATE?

GOVERNMENT REGULATION OF BUSINESS AND SECTORS - IRELAND



Q148. [TRACKING] When it comes to government regulation of business, do you think that your government regulates business too much, not enough or the right amount? (Not Enough, Too much) Informed Publics. Q262. When it comes to government regulation of the financial services industry, do you think that your government regulates it too much, not enough or the right amount? (Not Enough, Too much) Informed Publics. Q263. When it comes to government regulation of the energy industry, do you think that your government regulates it too much, not enough or the right amount? (Not Enough, Too much) Informed Publics. Q264. When it comes to government regulation of the food and beverage industry, do you think that your government regulates it too much, not enough or the right amount? (Not Enough, Too much) Informed Publics.

Conclusion

LEADING THE DEBATE FOR CHANGE

Participate

Business must join the societal debate.

Advocate

NGOs and Media have a job to do.

Evaluate

Government must reflect on original mandate for reform.

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