

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

Special Report: Brands and Social Media

1,000 respondents in each of 9 markets: **Brazil, Canada, China, France, Germany, India, UAE, U.K., and U.S.** All fieldwork was conducted online between April 16 and April 30, 2018.

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

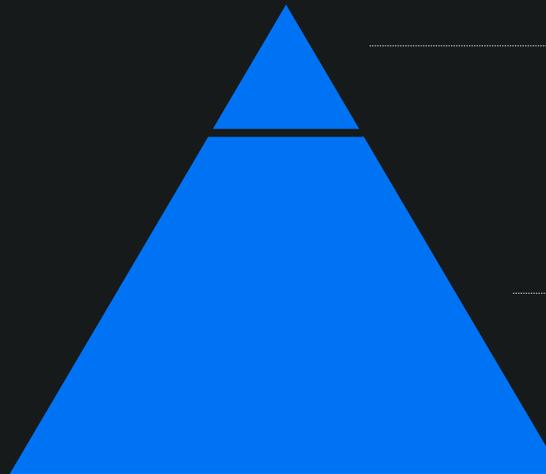
Mass Population

All population not including informed public

Represents 85% of total global population

28-market global data margin of error: General population +/- 0.6% (N=32,200), half-sample global general online population +/- 0.8% (N=16,100). Market-specific data margin of error: General population +/- 2.9% (N=1,150).

Special Report: Brands and Social Media survey data margin of error: 9-market average +/- 1.0% (N=9,000), market-specific data +/- 3.1% (N=1,000).



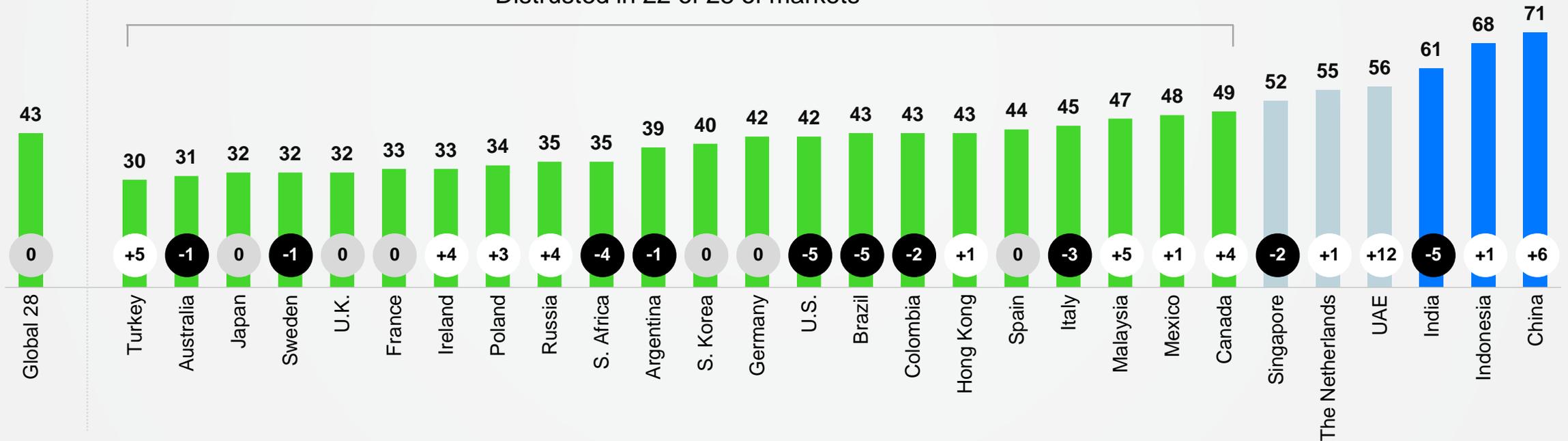
January 2018 Trust Barometer

Media Now Least Trusted Institution

Percent trust in media, and change from 2017 to 2018



Distrusted in 22 of 28 of markets



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-market global total.

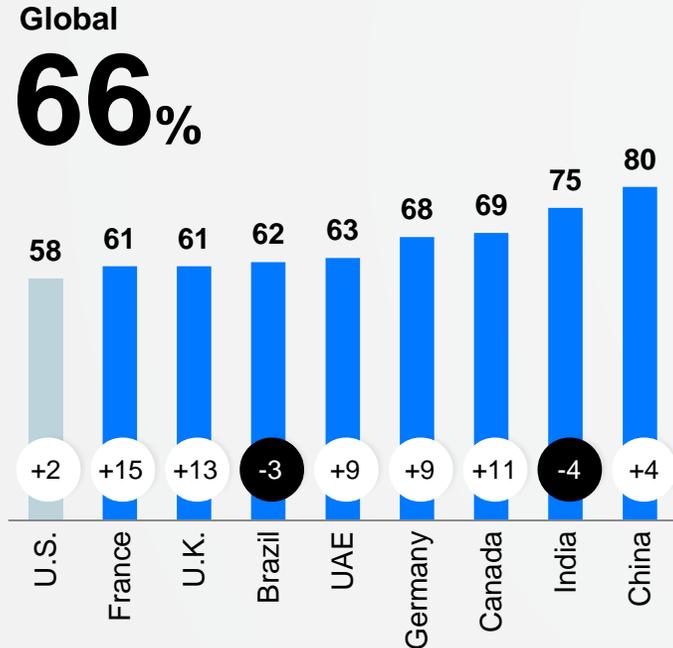
January 2018 Trust Barometer

Traditional Media, Search Trusted; Social Media Not

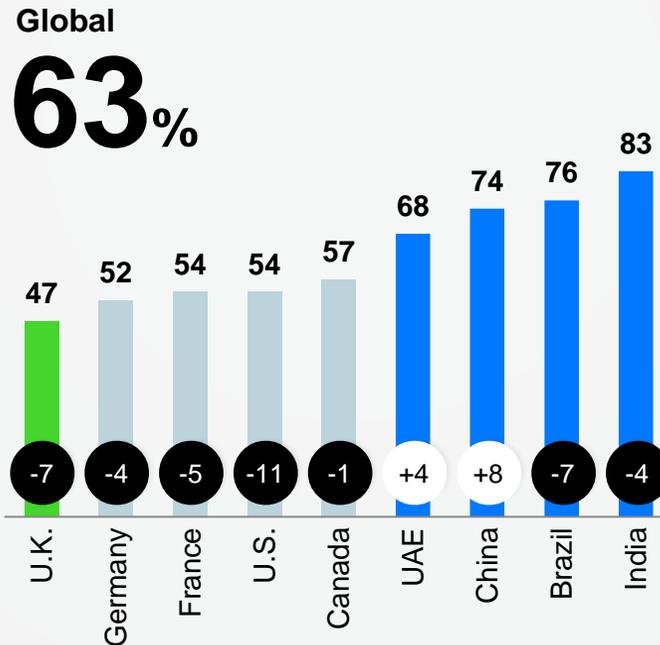
Percent trust in traditional media, search engines and social media platforms, and change from 2017 to 2018



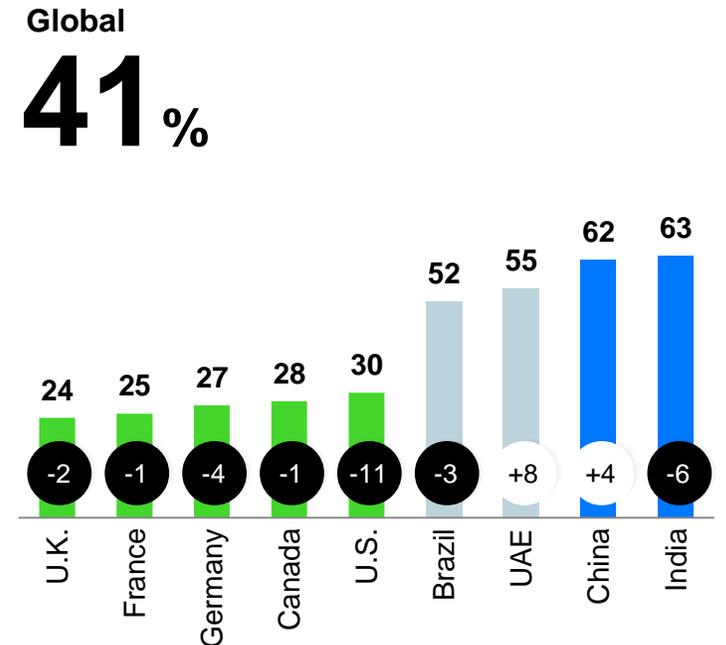
Traditional Media



Search Engines



Social Media



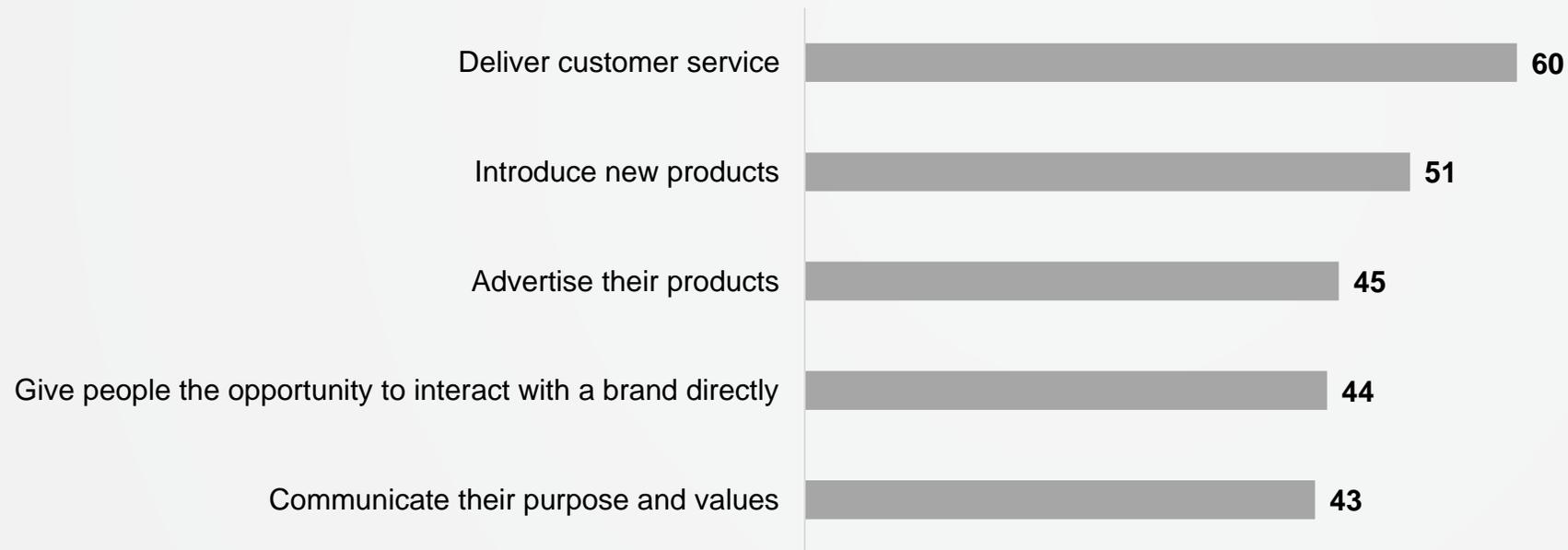
Source: 2018 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust), question asked of half of the sample. General population, 9-market average.

A grayscale photograph of a person's hand holding a surfboard. The image is overlaid with a series of blue, wavy, parallel lines that create a sense of motion and depth. The text is centered over the image.

At Risk: The Bond Between People and Brands

Social Media at the Heart of Today's Consumer Relationship

Percent who say the following are among the best and most effective ways for brands to be using social media to reach people like them



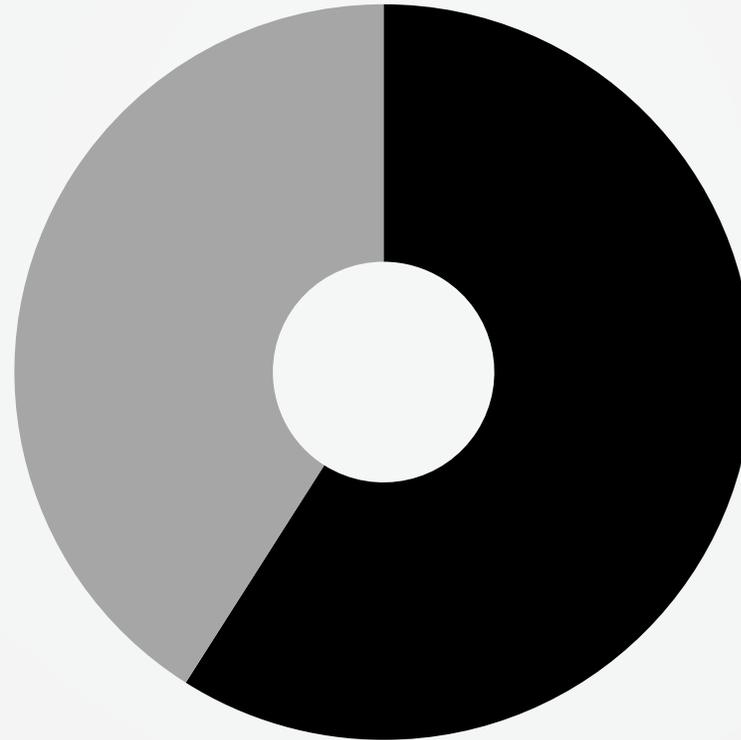
Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q14. Which of the following do you consider to be among the best and most effective ways for brands to be using social media to reach people like you? General population, 9-market average, among social media users.

Brand Conversations More Persuasive than Advertising

Which do you believe is giving you the truth?

41%

**What a brand says
in its advertising
and marketing materials**



59%

**What a brand says
in direct communications
with you** over email, instant
messaging or in response to a
comment you have posted

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q16. 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 is giving you the truth. While we know that some of these choices may not be easy, please do your best to select only one of the two options given--the one that is most likely to be true most often. General population, 9-market average.

Social Media Best for Brand Discovery and Brand Love

Social media chosen as best media channel for each of the following...

Social media

*Where I **discover** or hear about a new brand or product for the first time*

*Where I most often see and hear things that lead me to **fall in love with a brand***

*Where I most often see and hear things that lead me to **fall out of love with a brand***

True even among people who use social media infrequently (weekly or less)

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q7. Thinking about the five types of media, select the one that best fits each description below. Media types were traditional media, search, social media, owned and online-only media. General population, 9-market average.

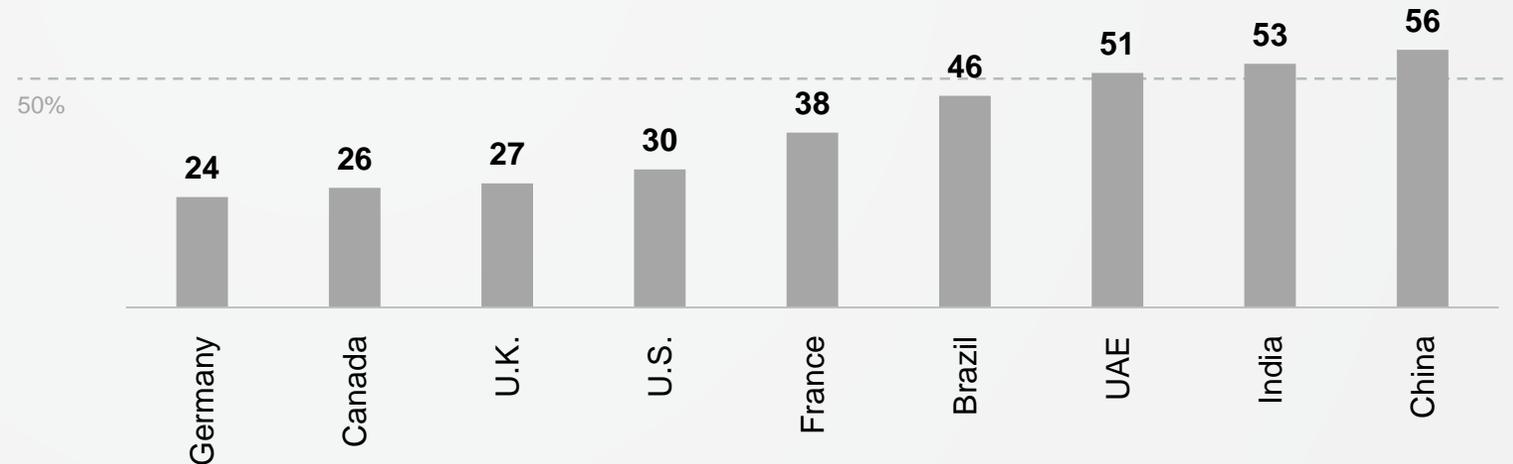
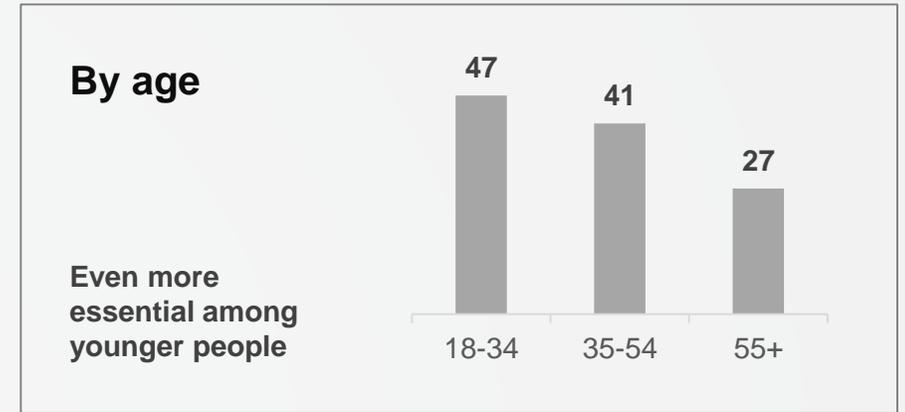
For a full list of descriptions, please see the Supplementary data appendix.

Social Media Essential for Building Emotional Bonds

Percent who agree

39%

I am unlikely to become emotionally attached to a brand unless we are interacting and communicating via social media



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q13. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means “strongly disagree” and nine means “strongly agree”. (Top 4 Box, Agree). General population, 9-market average, and by age.

The Risk: Without Trust, They Will Delete

Percent who agree

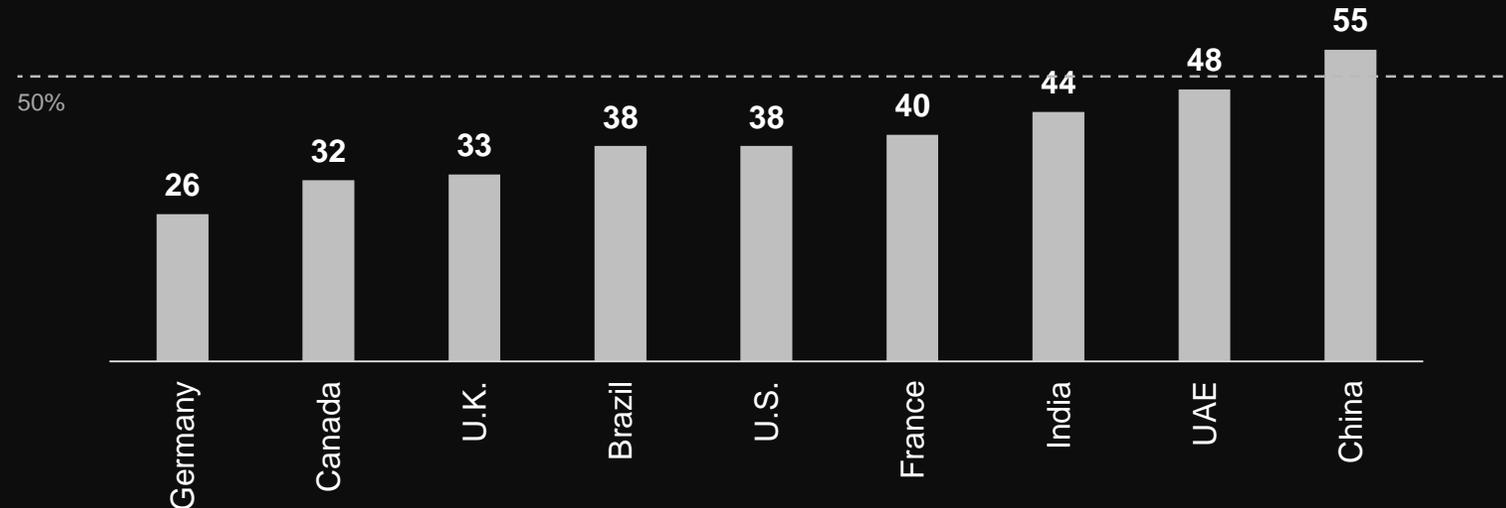
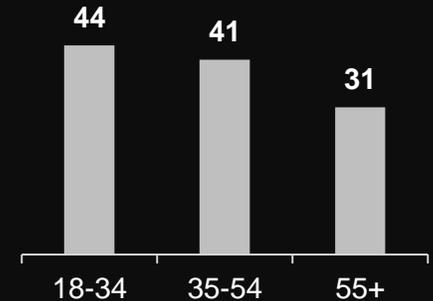
Global

40%

Say “I have deleted at least one of my social media accounts in the past year because I did not trust it to treat my personal information properly”

By age

Younger people more likely to delete social media if they don't trust it to properly use personal information



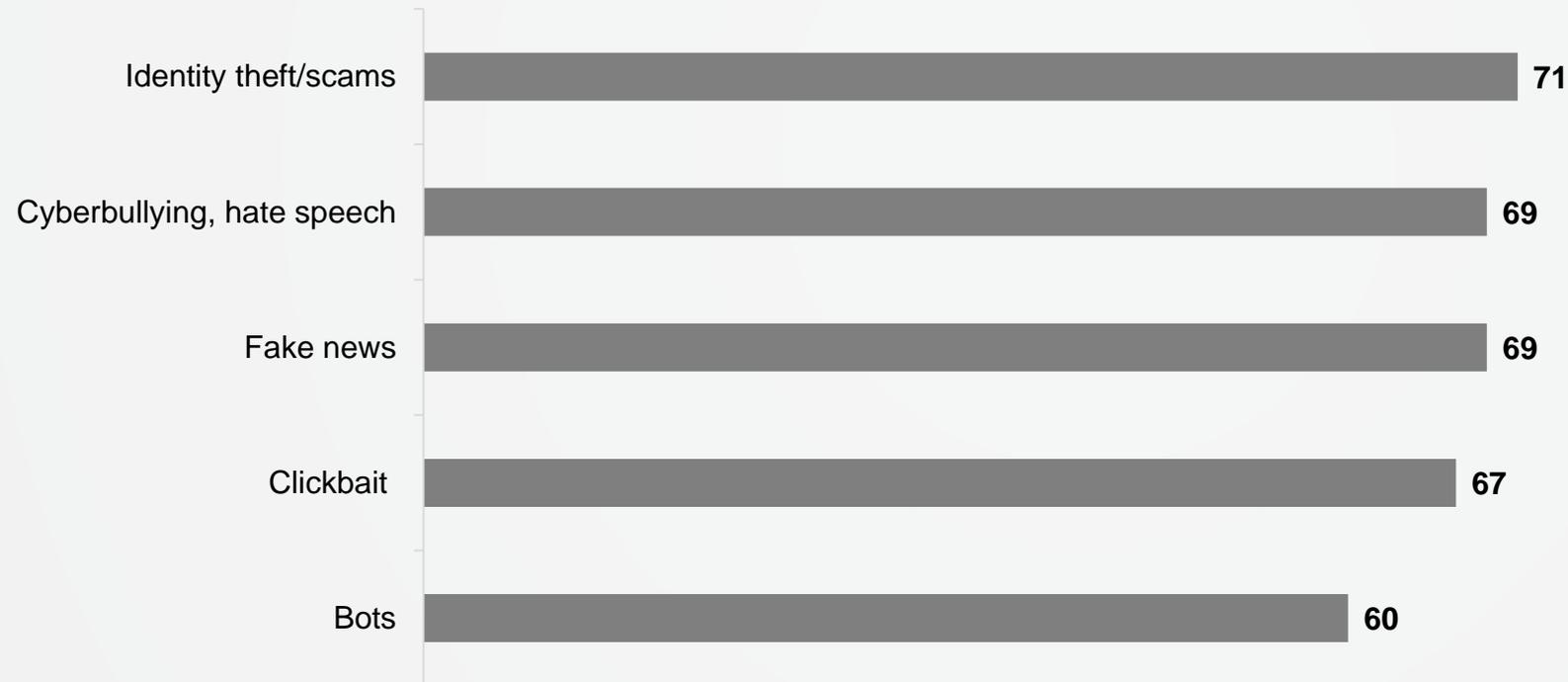
Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means “strongly disagree” and nine means “strongly agree”. (Top 4 Box, Agree). General population, 9-market average, and by age and among social media users.



Concerns About Data and Content Eroding Trust

Identity Theft, Hate Speech, Fake News Damage Trust in Social Media

Percent who say each has damaged their trust in social media



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q9. Please rate how much damage each of the following has had on your trust in social media. Indicate your answer using a 9-point scale where one means “no damage at all” and nine means “a lot of damage”. (Top 4 Box, Damage). General population, 9-market average.

“Cyberbullying, hate speech” is an average of Q9r3 and Q9r7

“Fake news” is an average of Q9r1, Q9r5, and Q9r9

Seeds of Distrust Dispersed Around the World

Percent who say these concerns have damaged their trust in social media, shown as an average across all five concerns

- Identity theft/scams
- Cyberbullying, hate speech
- Fake news
- Clickbait
- Bots



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q9. Please rate how much damage each of the following has had on your trust in social media. Indicate your answer using a 9-point scale where one means “no damage at all” and nine means “a lot of damage”. (Top 4 Box, Damage). General population, 9-market average.

“Cyberbullying, hate speech” is an average of Q9r3 and Q9r7

“Fake news” is an average of Q9r1, Q9r5, and Q9r9

Social Media Platforms Not Trusted to Address Fake News, Hate Speech

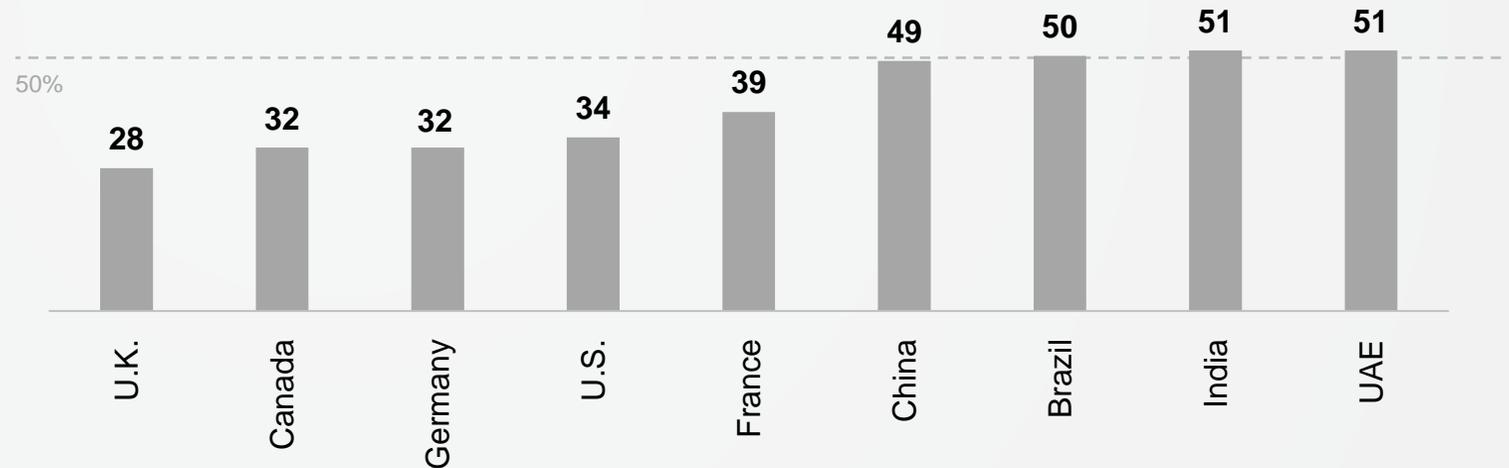
Percent who say social media is performing well on the following attributes

Only

40%

Agree social media is performing well in

- Controlling the spread of false information
- Controlling hate speech, trolling and intimidation



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q10. Please rate social media on how well you think it is performing in general on each of the following attributes. Use a 9-point scale where one means it is “performing extremely poorly” and nine means it is “performing extremely well”. (Top 4 Box, Performing well). General population, 9-market average.

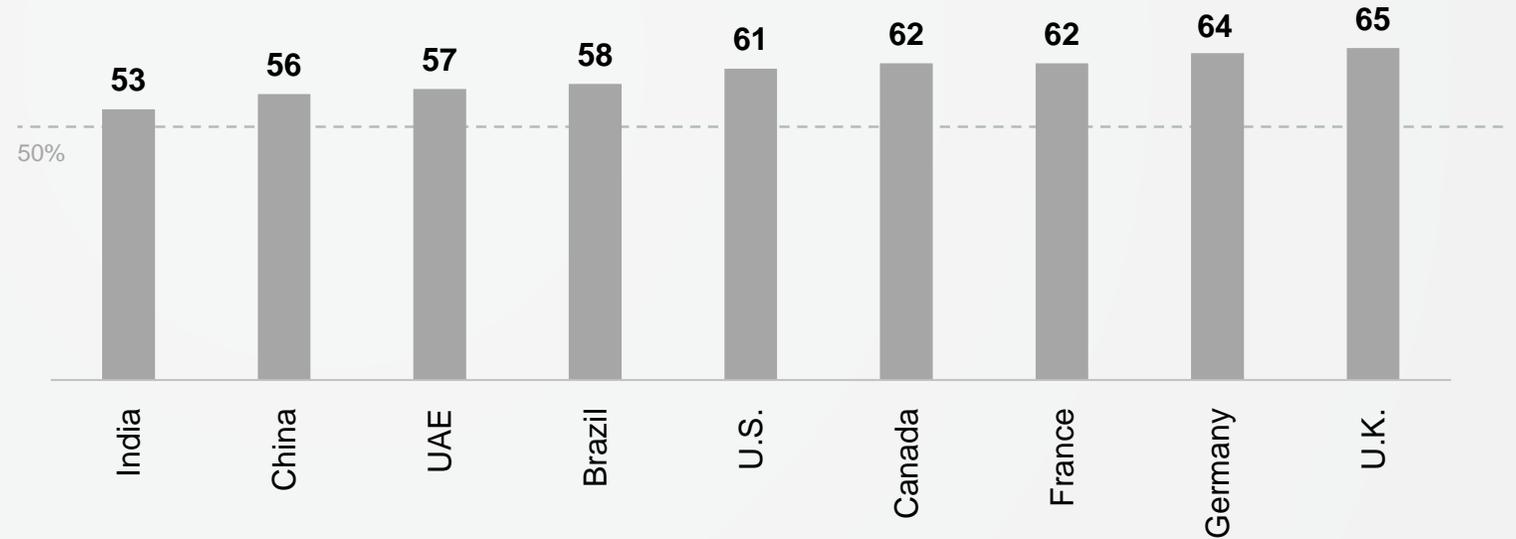
Numbers are an average of Q10r4 and Q10r6.

Social Media Platforms Not Trusted with User Data

Percent who agree

60%

I don't trust social media companies to behave responsibly with the information they collect about me



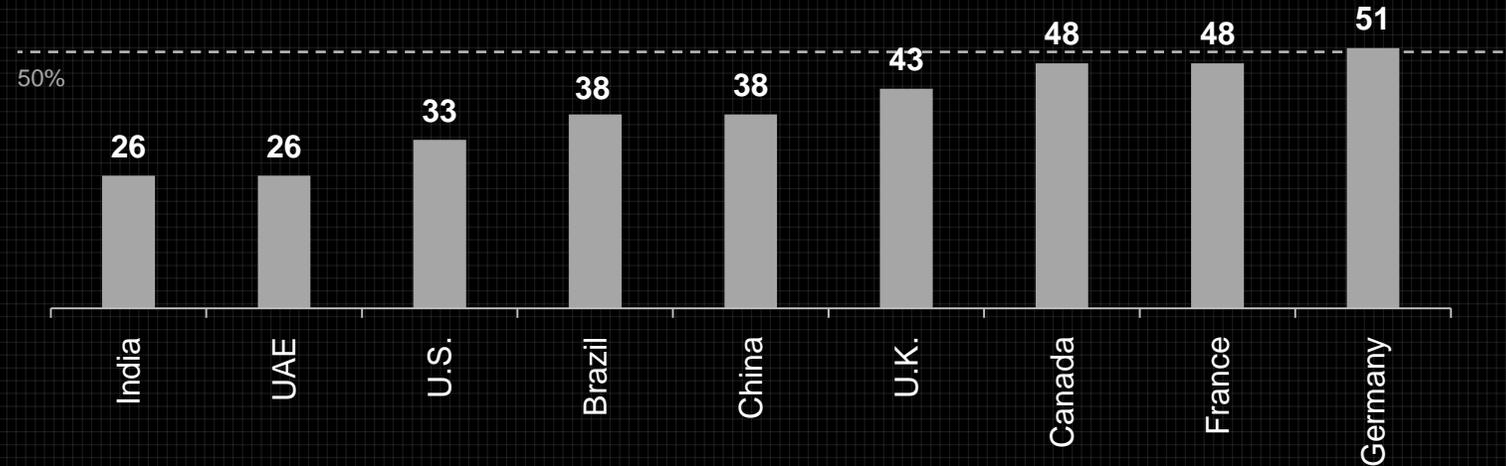
Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average.

Impact Broadens: Third-Party Data Under Scrutiny

Percent who rate the following practice used by brands as illegal

39%

It should be illegal for brands to buy your personal information from other companies you do business with



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Code 6, This should be illegal; Don't know omitted), question asked of half of the sample. General population, 9-market average.



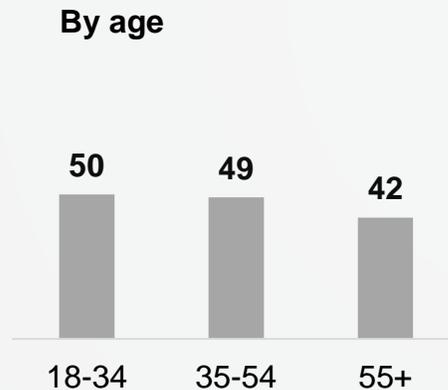
Brands Must Act

Brands Held Accountable for Adjacent Content

Percent who agree

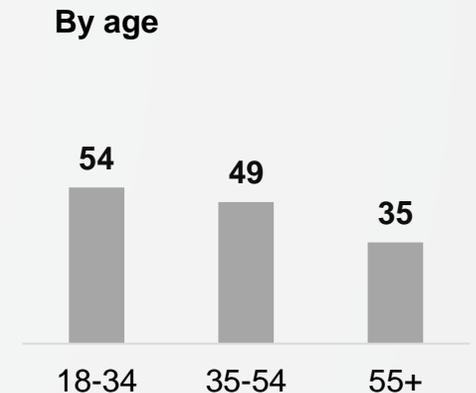
48%

It is a brand's own fault if its advertising appears next to hate speech, violent or sexually inappropriate content on web pages



47%

The points of view that appear near a brand's advertising and marketing messages are **an indication of that brand's values** and what it stands for



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q13. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average, and by age.

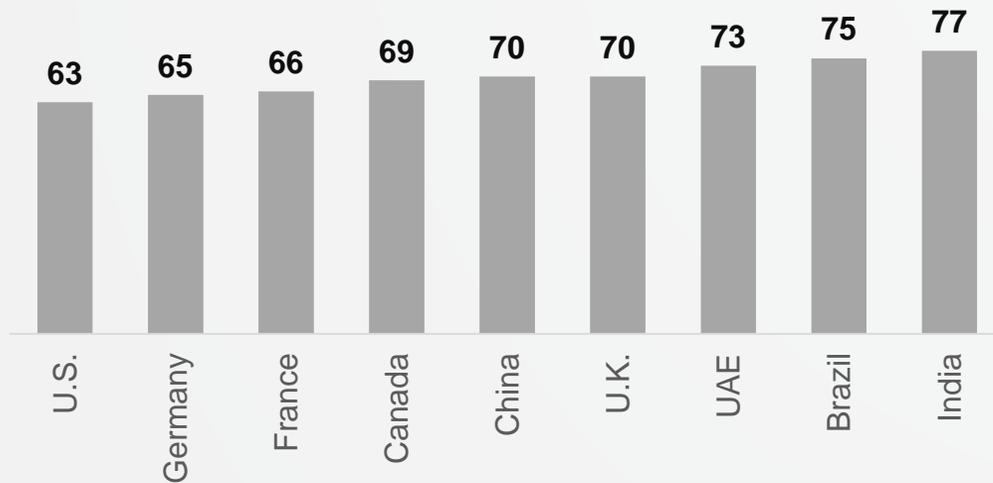
Brands Expected to Pressure Platforms to Address Fake News and Hate Speech

Percent who agree that brands should pressure social media to...

Global

70%

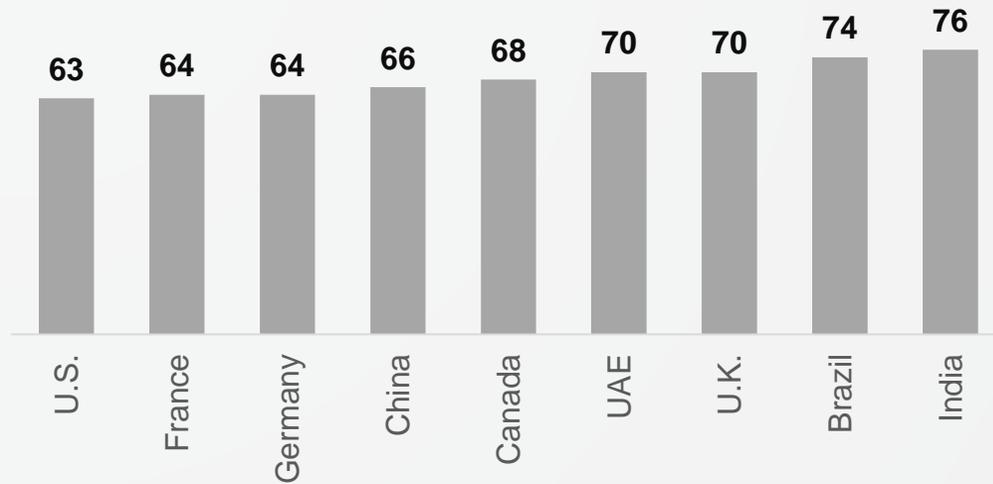
Do more about false information and fake news



Global

68%

Protect users from offensive/harmful content



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average.

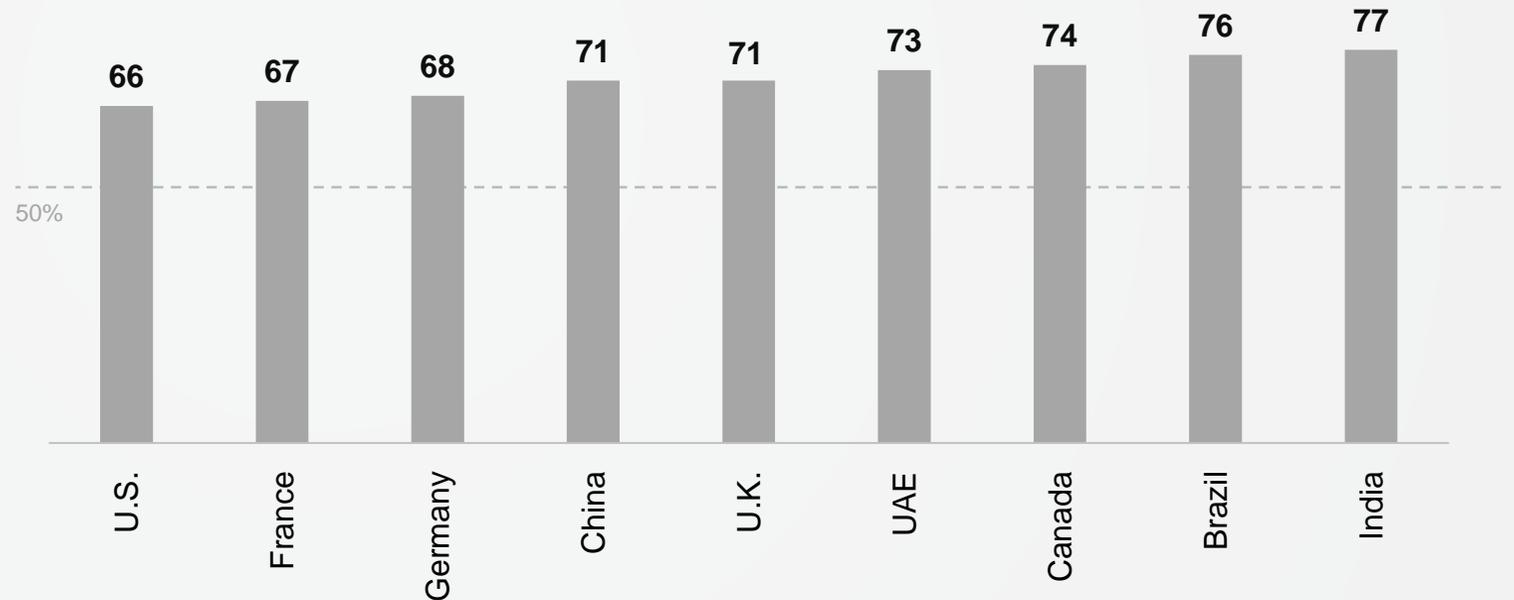
Brands Expected to Pressure Platforms to Protect and Defend Personal Data

Percent who agree that brands should pressure social media to...

Global

71%

Ensure personal data is protected and used ethically



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average.

Brands Must Act

- 1. Give them a better deal for their data**
- 2. Create trusted content on social media**
- 3. Join forces to build trust in social media**



1. Give Them a Better Deal for Their Data

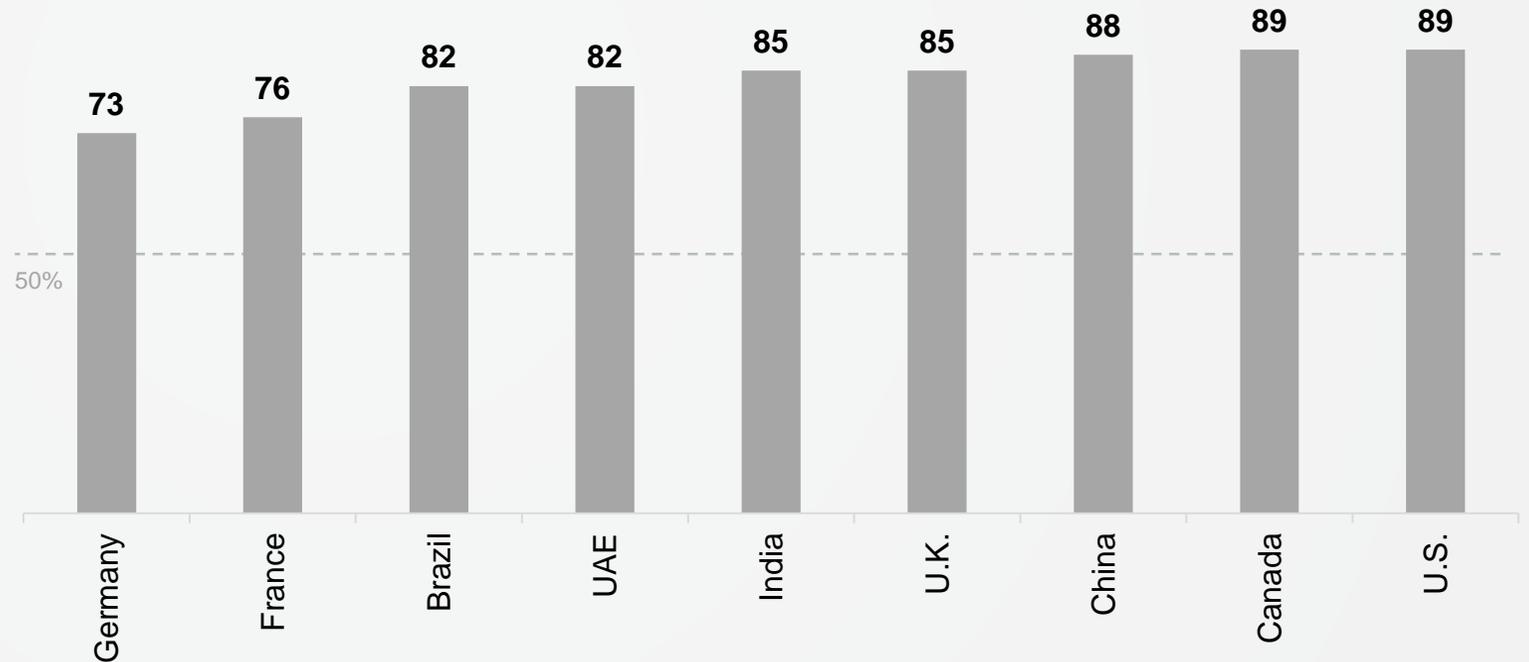
January 2018 Trust Barometer

Strong Obligation for Business to Protect Personal Data

Percent who think business has an obligation to protect people's privacy and personal information

83%

Protection of privacy and personal information is **one of the most important responsibilities** for business, or an issue business must help solve



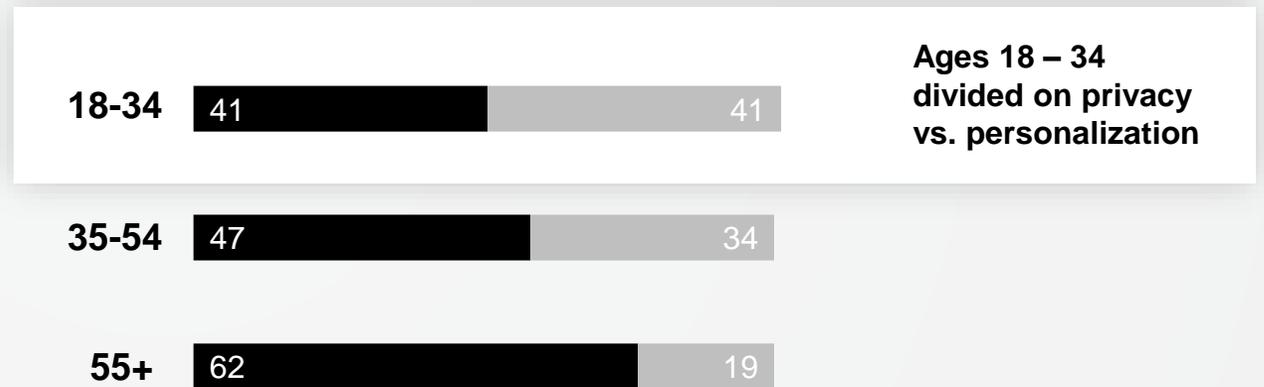
Source: 2018 Edelman Trust Barometer. INS_EXP_BUS. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about business in general, how would you characterize each using the following three-point scale. (Codes 2 and 3, Something business should contribute to/one of the most important responsibilities), question asked of one-third of the sample. General population, 9-market average.

Majority Not Willing to Pay for Personalization With Their Data

Percent who agree....

“I am willing to sacrifice some of my data privacy in return for a more personalized shopping experience”

9-market
global average



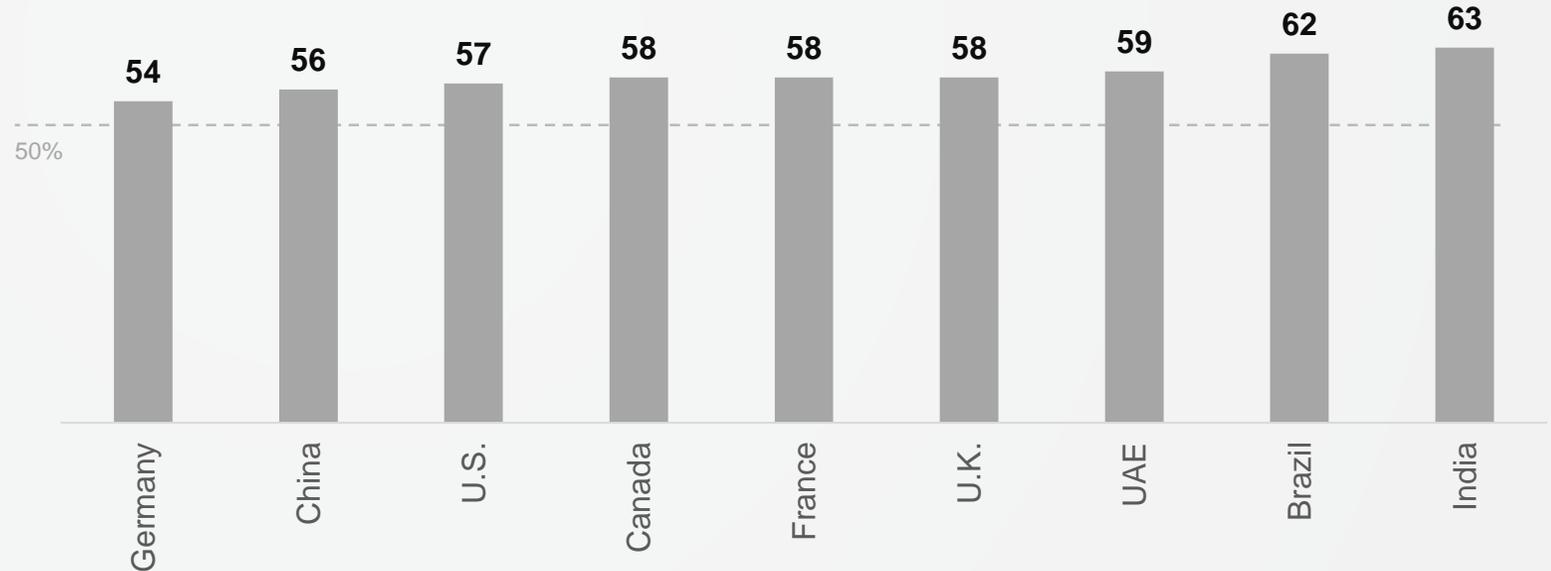
Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q13. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means “strongly disagree” and nine means “strongly agree”. (Top 4 Box, Agree; Bottom 4 Box, Disagree). General population, 9-market average, and by age.

Data Policies Must Be More Clear

Percent who agree

58%

It is often difficult to understand what information I am giving platforms or applications access to or permission to collect and use

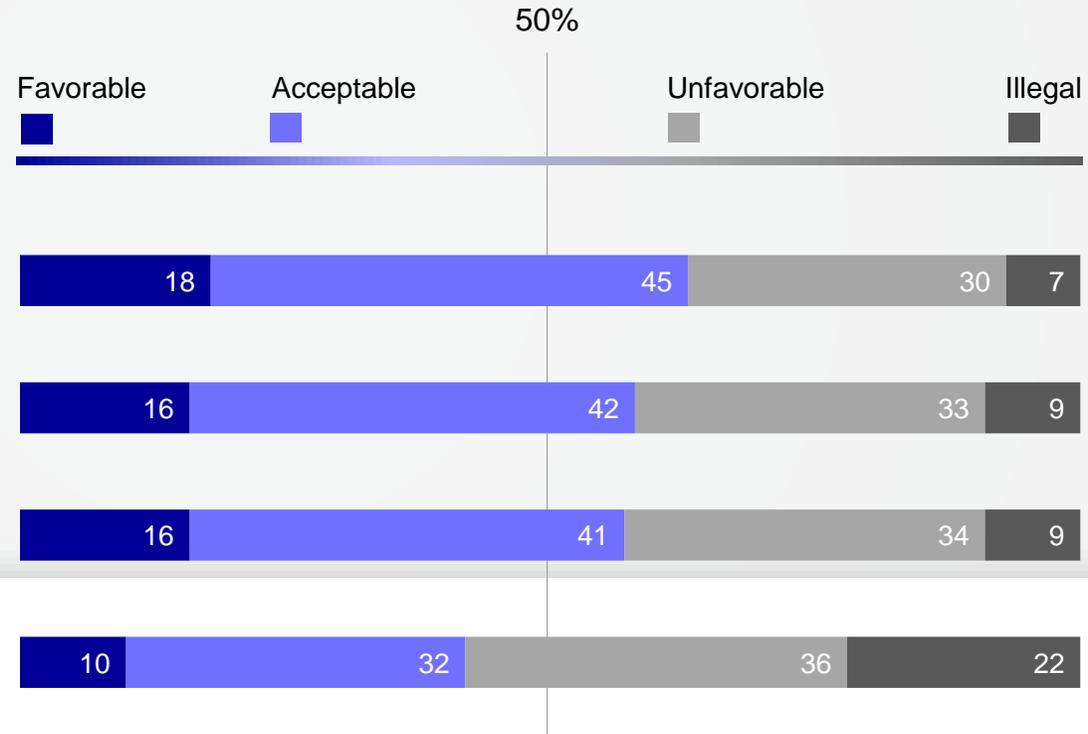


Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average.

Use Likes, Shares and Views to Personalize Content—But Be Cautious With Politics

Percent who rate each of the following practices as favorable, acceptable, unfavorable or illegal

Is it OK for brands to use social media behavior for targeting?



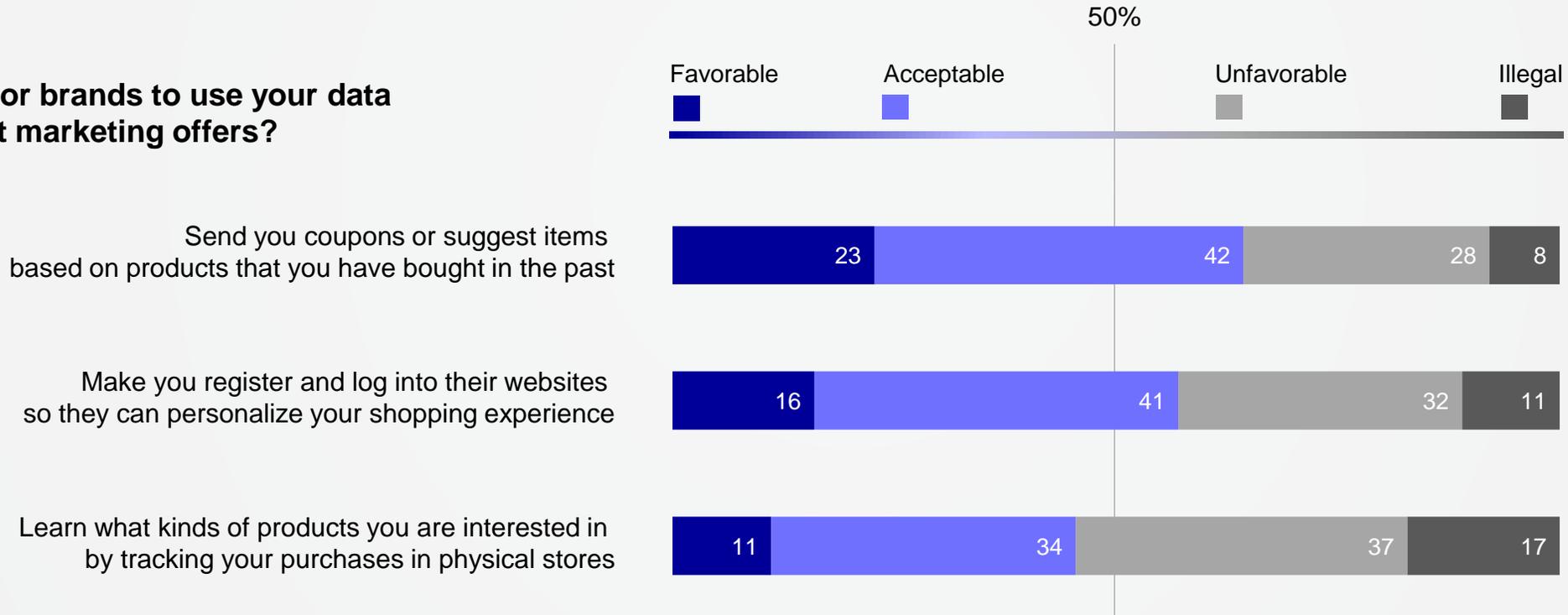
Greater sensitivity about political targeting

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Favorable, Code 1; Acceptable, Codes 2-3; Unfavorable, Codes 4-5; Illegal, Code 6; Don't know omitted), question asked of half of the sample. General population, 9-market average.

Build a Direct Relationship

Percent who rate each of the following practices as favorable, acceptable, unfavorable or illegal

Is it OK for brands to use your data for direct marketing offers?

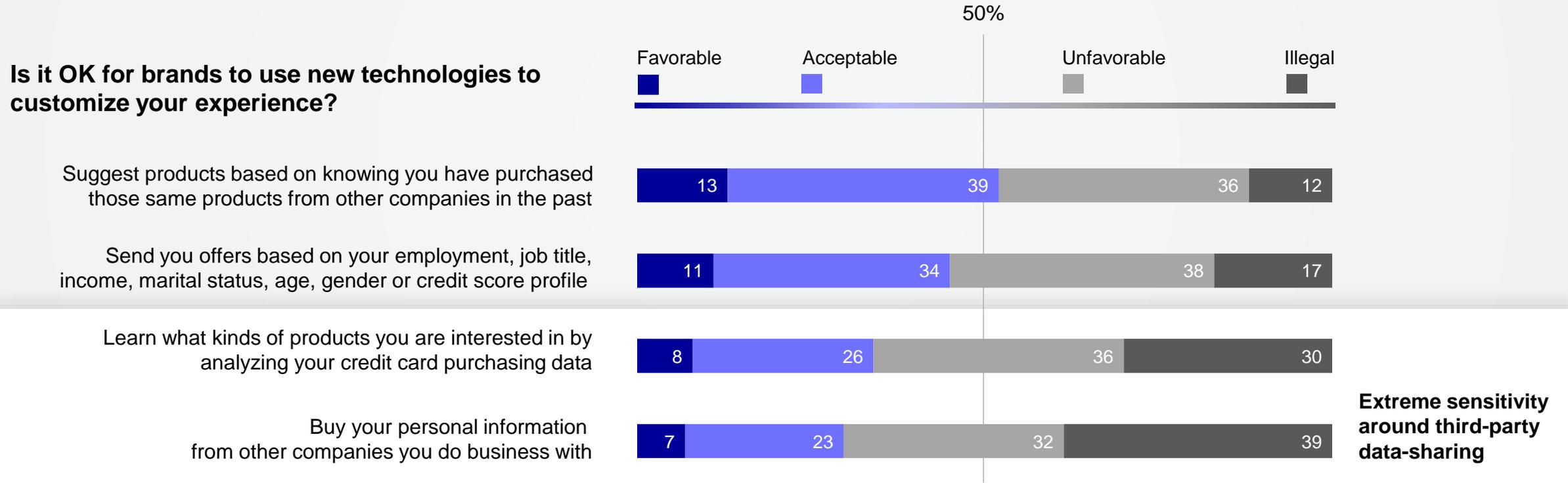


Make sure loyalty programs are well-explained

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Favorable, Code 1; Acceptable, Codes 2-3; Unfavorable, Codes 4-5; Illegal, Code 6; Don't know omitted), question asked of half of the sample. General population, 9-market average.

Assess Your Risks of Using Third-Party Data

Percent who rate each of the following practices as favorable, acceptable, unfavorable or illegal



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Favorable, Code 1; Acceptable, Codes 2-3; Unfavorable, Codes 4-5; Illegal, Code 6; Don't know omitted), question asked of half of the sample. General population, 9-market average.

A man in a dark shirt is looking down at a smartphone. The image is dark and has a blue wavy graphic overlay that flows across the middle of the frame. The text '2. Create Trusted Content on Social Media' is written in white, with the number '2' underlined in blue.

2. Create Trusted Content on Social Media

Signal Credibility Through Production, Credentials and Transparency

Percent who rated each attribute as important in making a decision about whether or not to trust information or other content they see on social media

Quality of the writing or visuals	65
Author's credentials or expertise	63
Content is well-designed and looks formal	58
It is easy to determine who paid for the content	57
The logo of the organization that produced the content is displayed next to the post	55

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q17. When you are judging whether or not to trust information or other content you see on social media, how important is each of the following attributes in making your decision? Indicate your answer using a 9-point scale where one means it is "not at all important" and nine means it is "critically important". (Top 4 Box, Important), question asked of half of the sample. General population, 9-market average, among social media users.

Build a Strong Relationship

Percent who rated each attribute as important in making a decision about whether or not to trust information or other content they see on social media

You have opted in to receive communications from this organization	59
It was placed on the platform by a brand you buy	56
Who liked, shared or sent you the content	53

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q17. When you are judging whether or not to trust information or other content you see on social media, how important is each of the following attributes in making your decision? Indicate your answer using a 9-point scale where one means it is “not at all important” and nine means it is “critically important”. (Top 4 Box, Important), question asked of half of the sample. General population, 9-market average, among social media users.

Use the Right Media Mix, and Build Frequency Across Channels

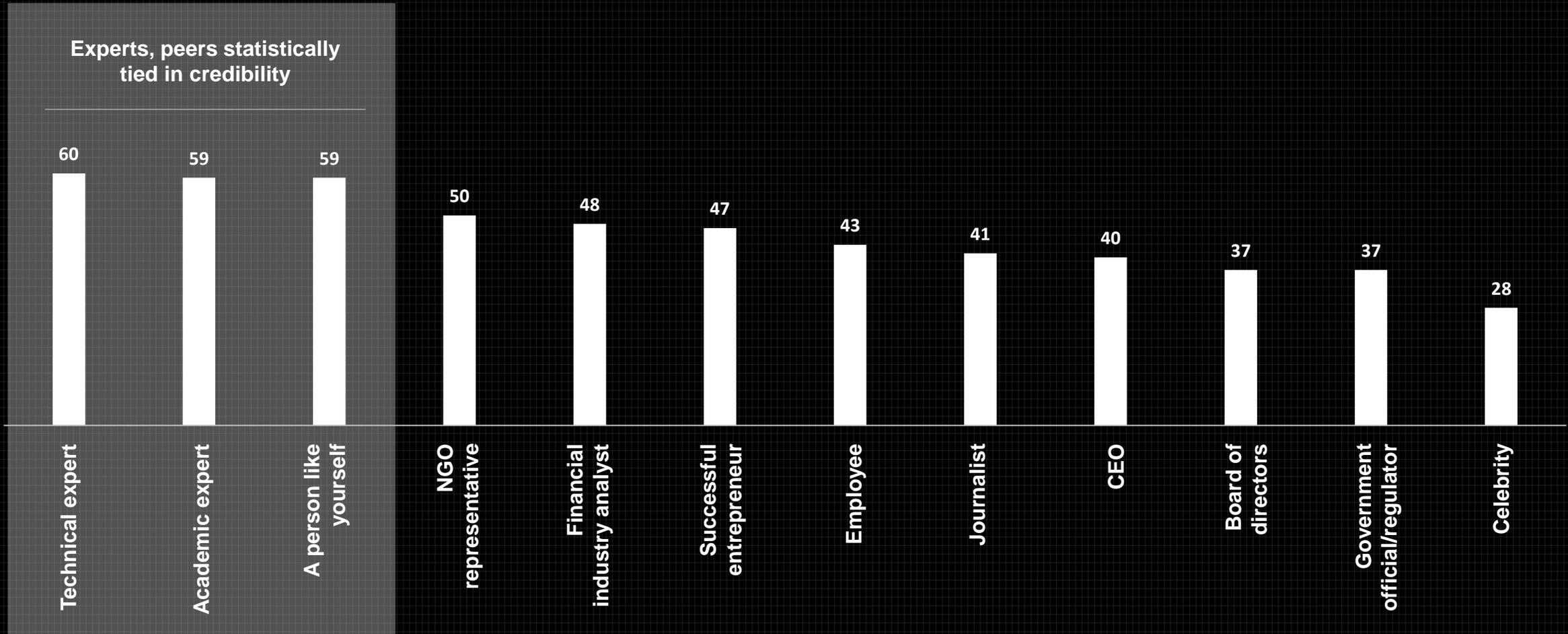
Percent who rated each attribute as important in making a decision about whether or not to trust information or other content they see on social media

If you have seen the same information on TV or in the newspapers	65
If you have seen the same information on several social media platforms	59
If the same information has been shared with you by several people	57

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q17. When you are judging whether or not to trust information or other content you see on social media, how important is each of the following attributes in making your decision? Indicate your answer using a 9-point scale where one means it is “not at all important” and nine means it is “critically important”. (Top 4 Box, Important), question asked of half of the sample. General population, 9-market average, among social media users.

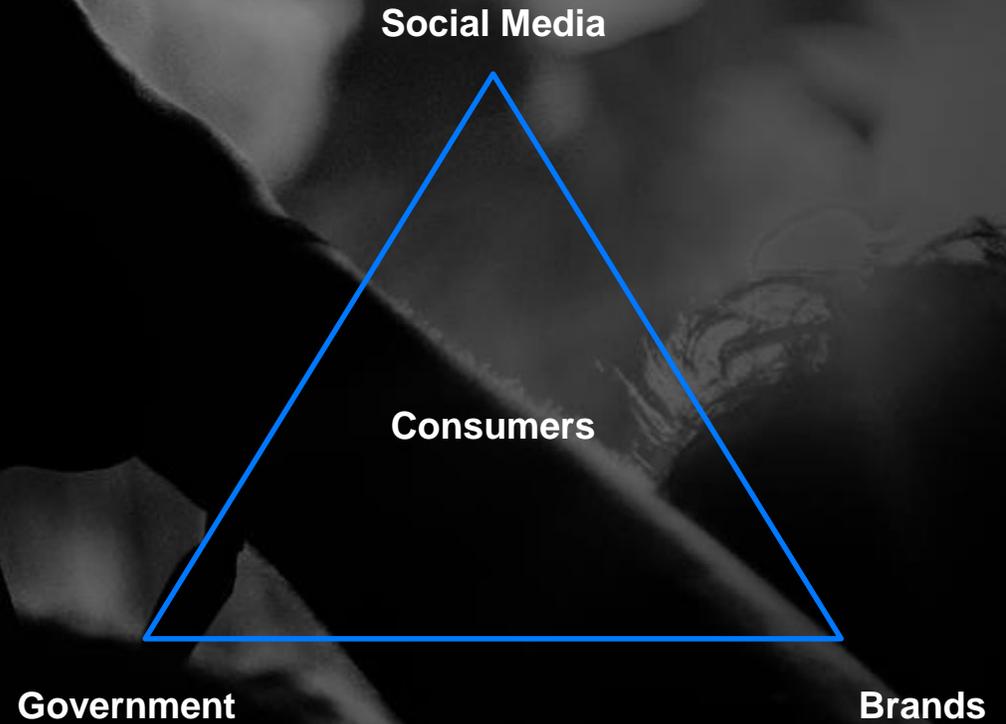
Deploy Credible Expert and Peer Voices

Percent who rate each spokesperson as very/extremely credible for information about a brand



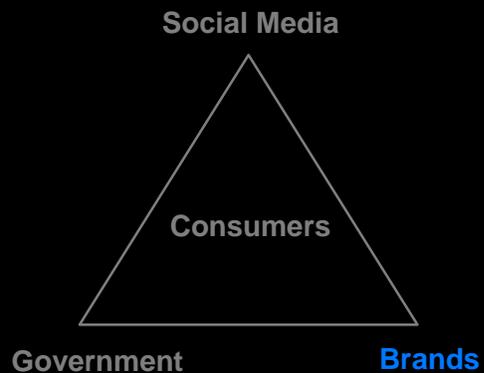
Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q21. Below is a list of people. In general, when forming an opinion of a brand, if you heard information about that brand from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely credible). General population, 9-market average.

3. Join Forces to Build Trust in Social Media



Brands Expected to Help Solve Data and Content Challenges

Percent who have a strong expectation that brands inform policy and offer solutions on each topic

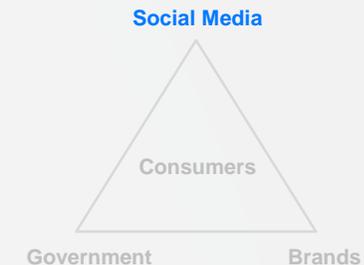


Data privacy	67
Economic prosperity	59
Global warming	57
Automation	53
Globalization	53
Cost of living	52
Discrimination	52
Sexual harassment	52
Fake news	51
Infrastructure	49
Reducing violence	48
Healthcare	47
Education	46
Government corruption	42
Immigration	38
LGBTQ issues	33

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q2. For each of the following topics, please indicate to what degree brands should be held responsible for directly helping to inform policy and offer solutions. (Top 2 Box, Strong expectation), question asked of half of the sample. General population, 9-market average.

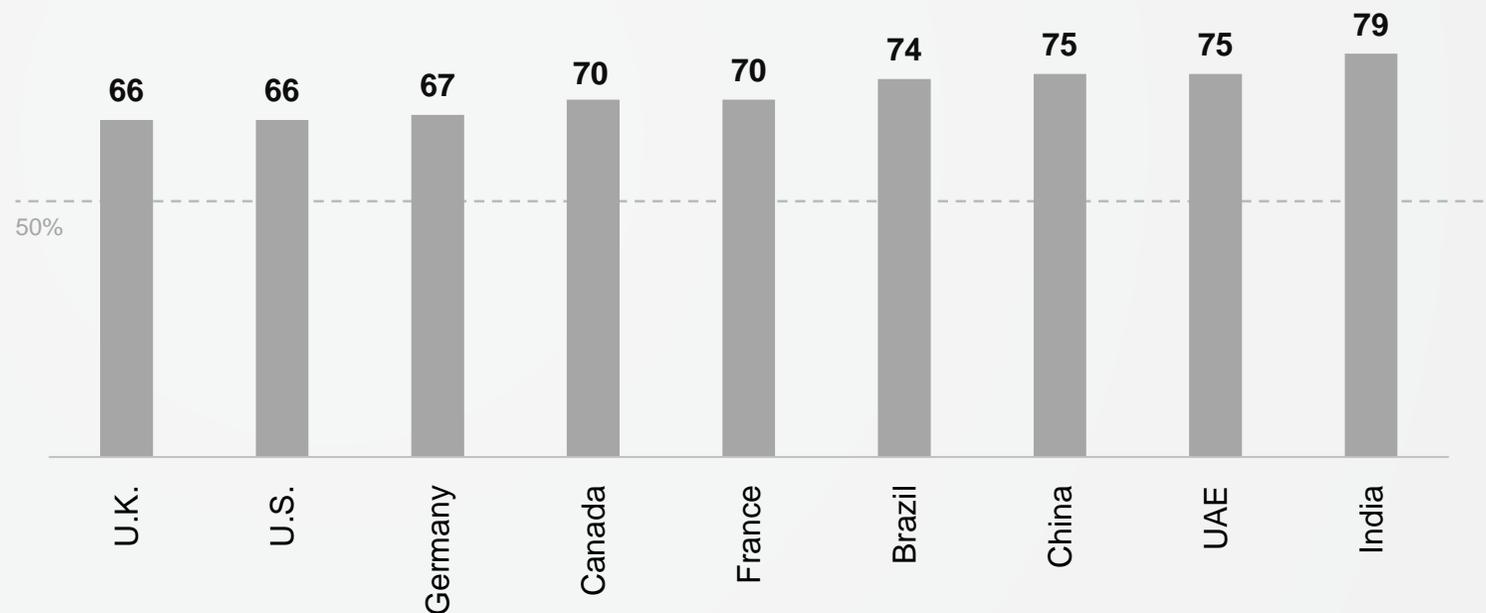
Partner with Social Media: Support for Quality Journalism Wanted

Percent who agree



71%

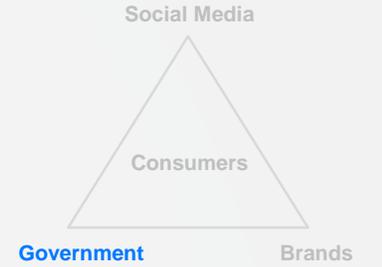
Social media should do more to support high-quality journalism



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average.

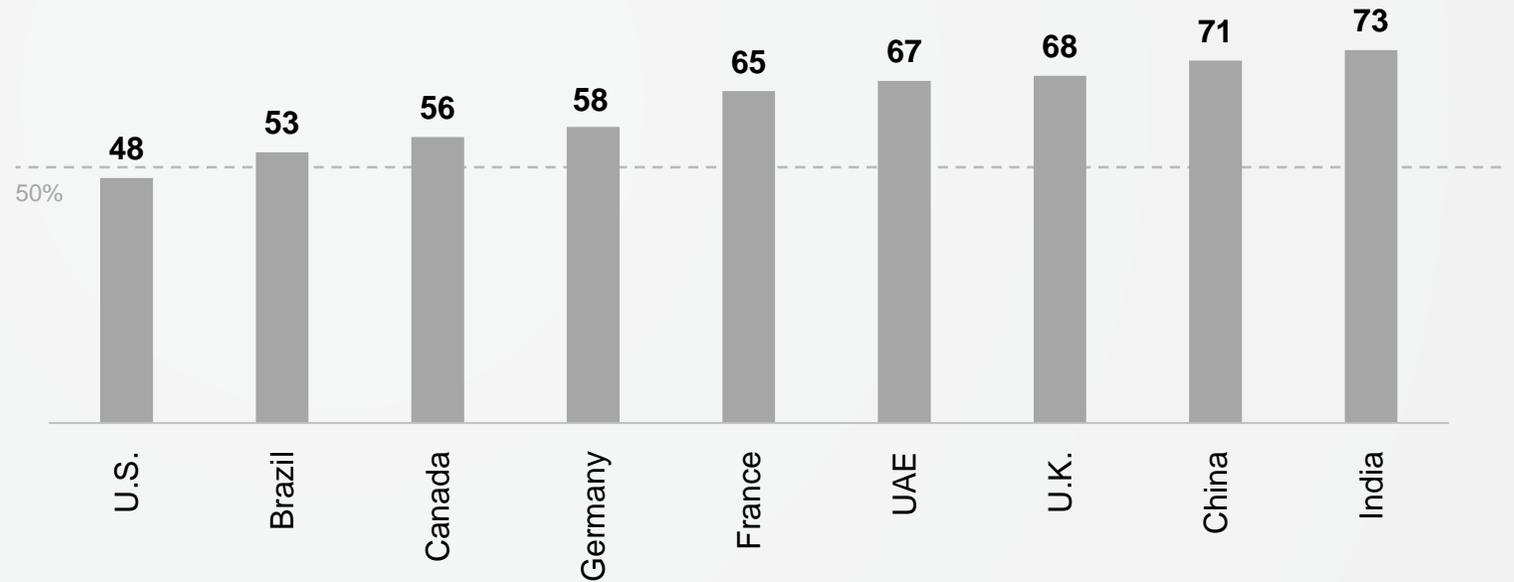
Partner with Government: More Regulation Wanted

Percent who agree



62%

Governments should do more to regulate social media



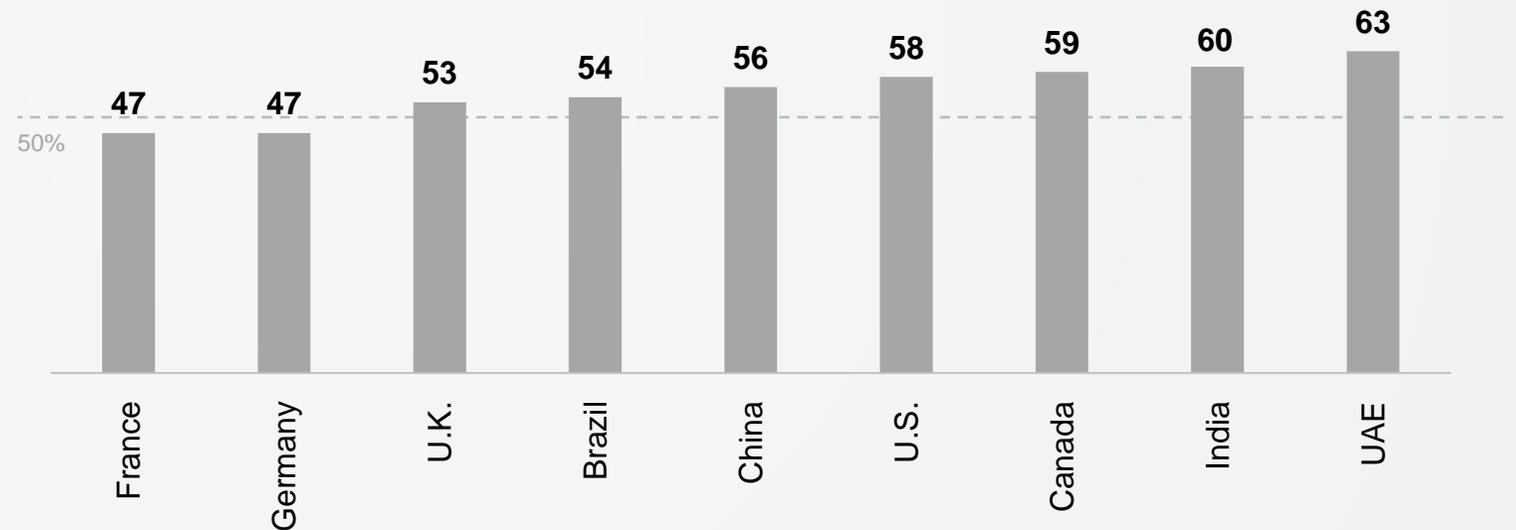
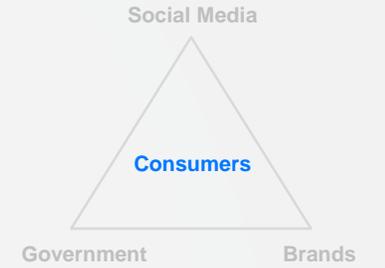
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Partner with Consumers: They Understand Limits

Percent who agree

55%

It would be almost impossible for social media companies to remove all offensive and inappropriate content without abandoning the value of freedom of speech



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q8. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a 9-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree). General population, 9-market average.

Taking Action to Earn Trust

- 1 Build a coalition
- 2 Take a public stand
- 3 Go direct
- 4 Be proactive about data and privacy
- 5 Create and champion quality content
- 6 Act with integrity, transparency and humanity

Supplementary Data

2018 Edelman Trust Barometer

Special Report: Brands and Social Media



The Role Different Types of Media Plays in People's Lives

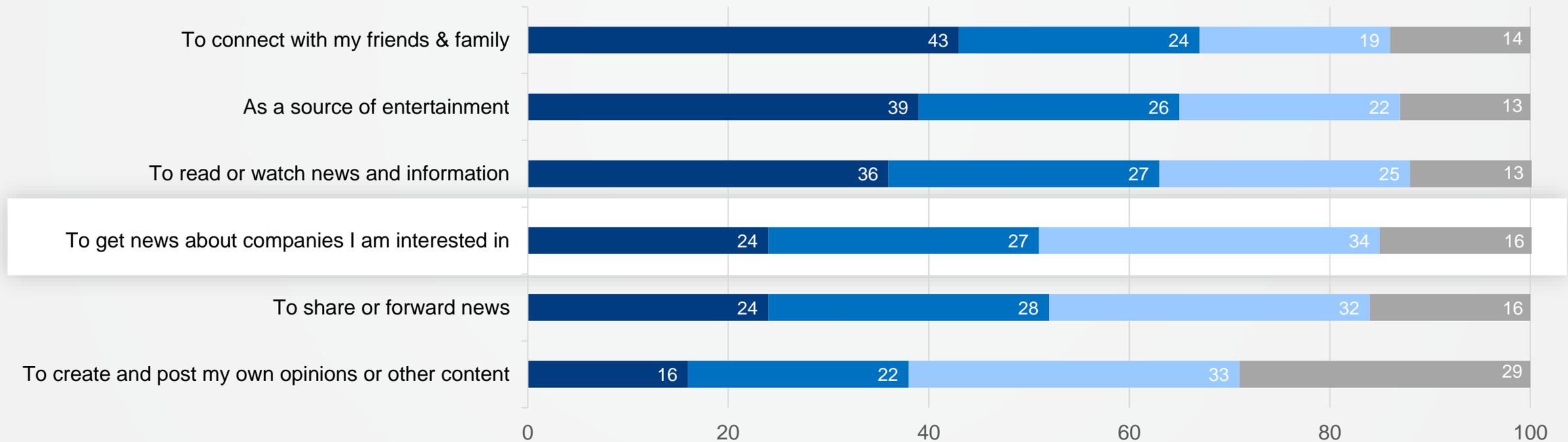
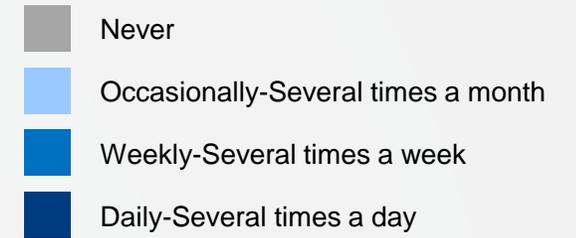
Which type of media—traditional media, online-only media, search, company-owned or social media—best fits each description below?

	Traditional	Online	Social	Owned	Search
Attributes					
Most entertaining			X		
Least annoying to use	X				
The one I would be the least able to live without			X		
The one I spend the most time with			X		
Where I most often go to get up-to-date on politics and political issues	X				
Connection to Brands					
The one I use to keep up with the companies and brands I like best					X
Where I discover or hear about a new brand or product for the first time			X		
Where I most often see and hear things that lead me to fall in love with a brand			X		
Where I most often see and hear things that lead me to fall out of love with a brand			X		
Where I am most likely to see information that convinces me to purchase a specific brand					X
The advertising is the least disruptive of my overall user experience	X				

Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q7. Thinking about the five types of media, select the one that best fits each description below. Media types were traditional media, search, social media, owned and online-only media. General population, 9-market average.

How Consumers Use Social Media

Percent who say they use social media for each activity

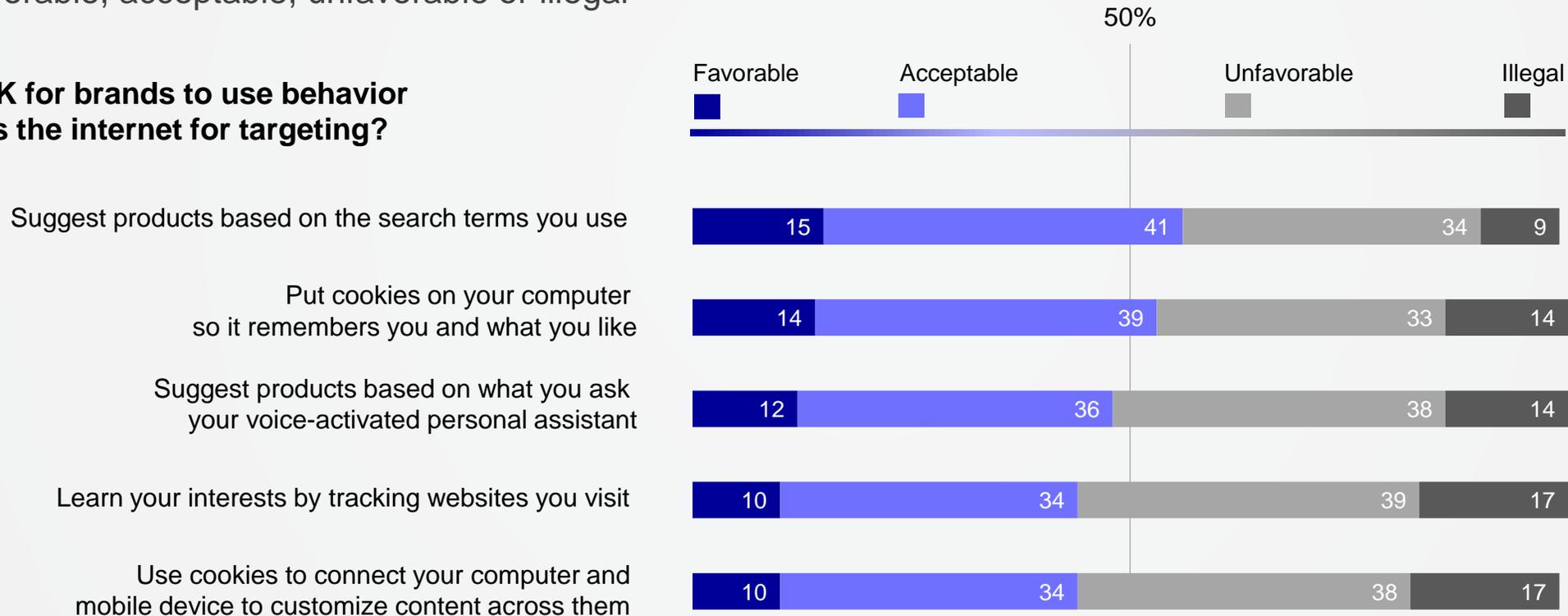


Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. S16. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. (Never, Code 1; Occasionally, Codes 2-3; Weekly, Codes 4-5; Daily, Codes 6-7). General population, 9-market average.

Search and Cookies Still Controversial; Cross-Platform Tracking More So

Percent who rate each of the following practices as favorable, acceptable, unfavorable or illegal

Is it OK for brands to use behavior across the internet for targeting?

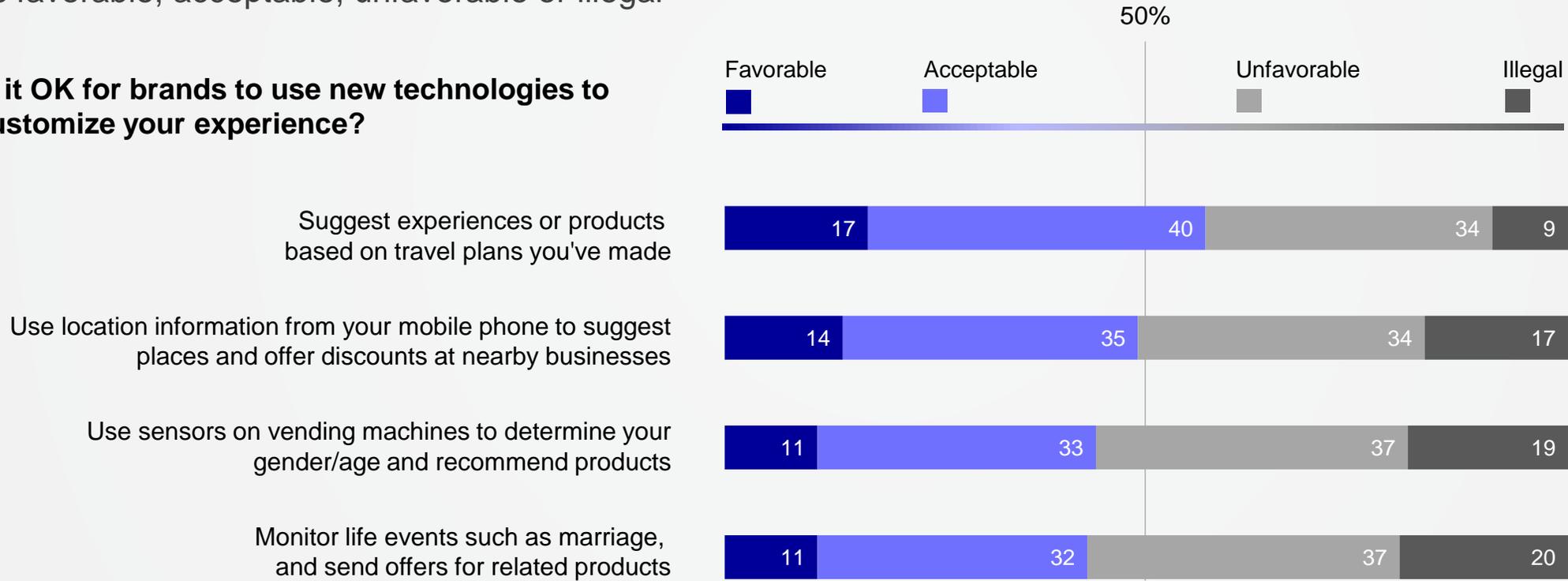


Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Favorable, Code 1; Acceptable, Codes 2-3; Unfavorable, Codes 4-5; Illegal, Code 6; Don't know omitted), question asked of half of the sample. General population, 9-market average.

Tread Carefully With Location Data and Sensors

Percent who rate each of the following practices as favorable, acceptable, unfavorable or illegal

Is it OK for brands to use new technologies to customize your experience?

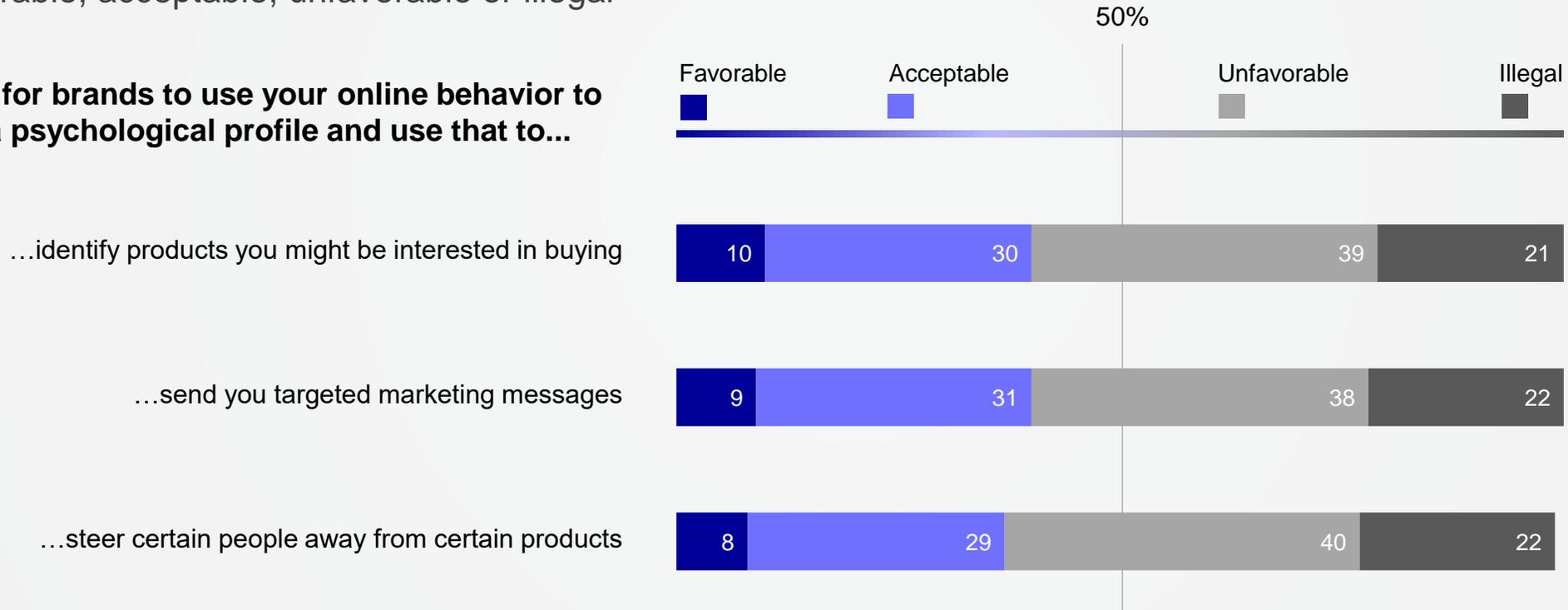


Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Favorable, Code 1; Acceptable, Codes 2-3; Unfavorable, Codes 4-5; Illegal, Code 6; Don't know omitted), question asked of half of the sample. General population, 9-market average.

Psychological Profiling Not Acceptable For Most Consumers

Percent who rate each of the following practices as favorable, acceptable, unfavorable or illegal

Is it OK for brands to use your online behavior to create a psychological profile and use that to...



Source: 2018 Edelman Trust Barometer: Special Report: Brands and Social Media. Q15. Below is a list of ways that brands and technology companies can gather information about people, their interests, and what things they may be thinking of purchasing so that they can sell products to you more effectively. For each one, please select the statement below that best describes your feelings about that practice. (Favorable, Code 1; Acceptable, Codes 2-3; Unfavorable, Codes 4-5; Illegal, Code 6; Don't know omitted), question asked of half of the sample. General population, 9-market average.