2017 Edelman Trust Barometer

Mexico
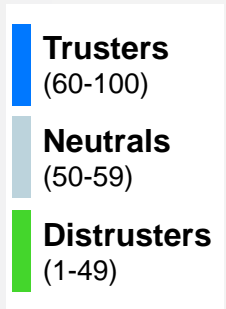

Edelman
trustbarometer
2017 | ANNUAL GLOBAL STUDY

Edelman

Trust in Retrospect

2001 — Rising Influence of NGOs

2002 — Fall of the Celebrity CEO

2003 — Earned Media More Credible Than Advertising

2004 — U.S. Companies in Europe Suffer Trust Discount

2005 — Trust Shifts from "Authorities" to Peers

2006 — "A Person Like Me" Emerges as Credible Spokesperson

2007 — Business More Trusted Than Government and Media

2008 — Young Influencers Have More Trust in Business

2009 — Business Must Partner with Government to Regain Trust

2010 — Trust is Now an Essential Line of Business

2011 — Rise of Authority Figures

2012 — Fall of Government

2013 — Crisis of Leadership

2014 — Business to Lead the Debate for Change

2015 — Trust is Essential to Innovation

2016 — Growing Inequality of Trust

2017 — **Trust in Crisis**

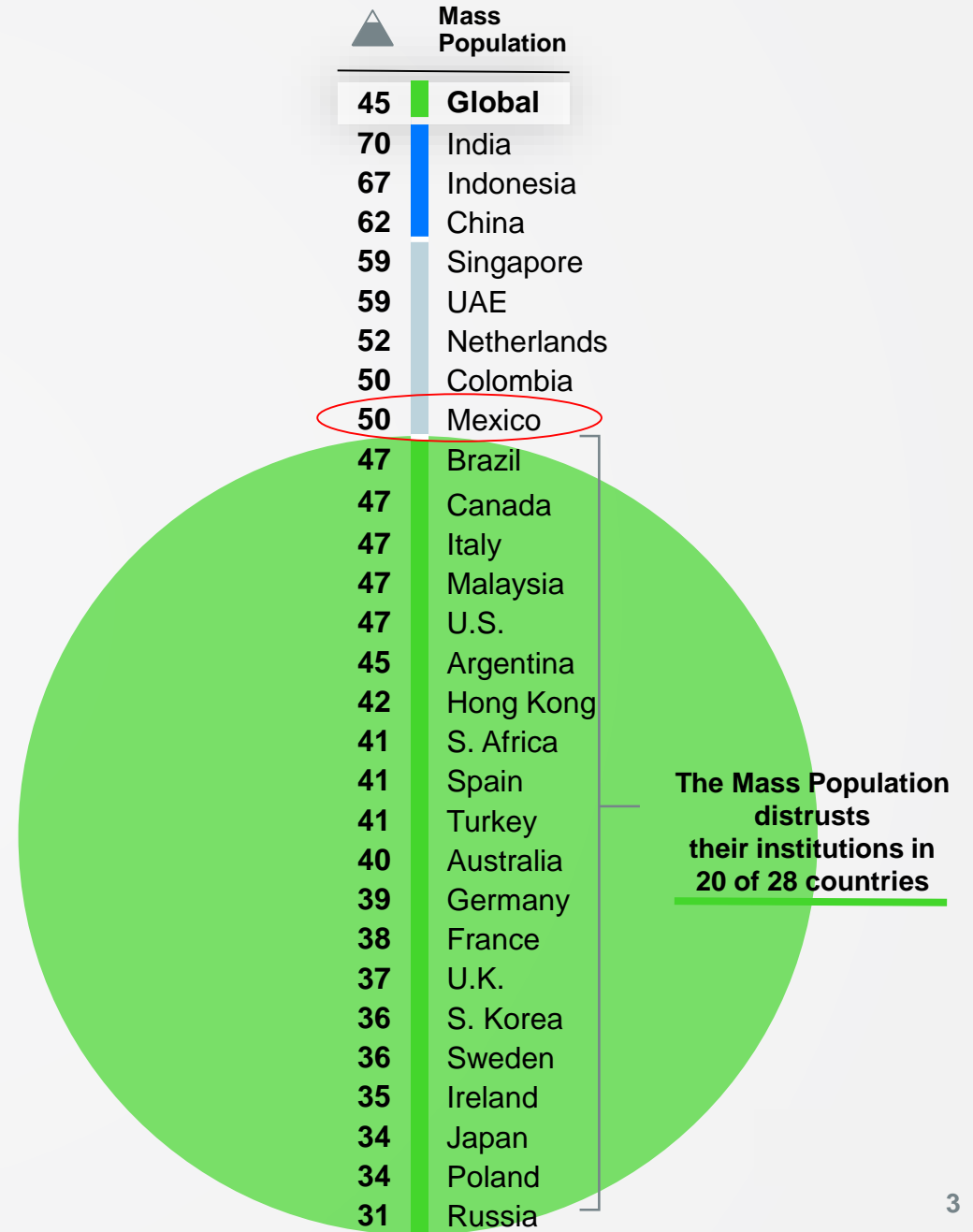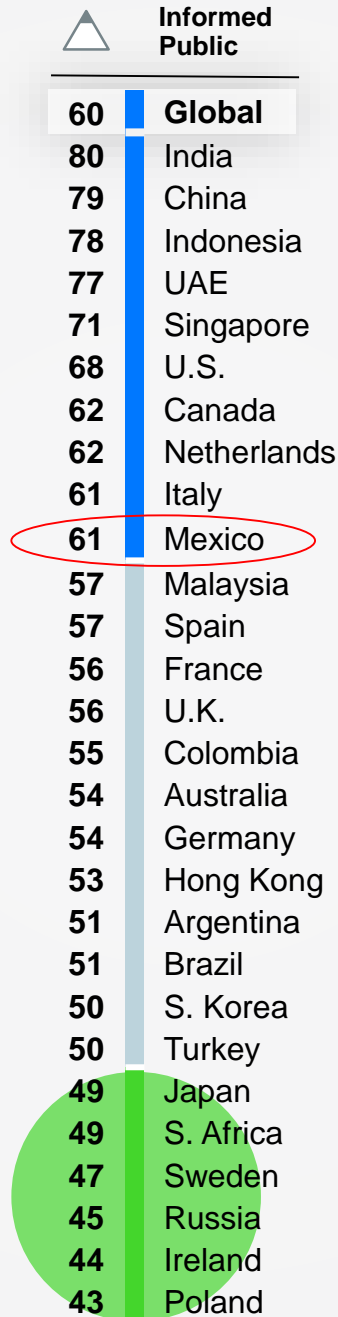# Trust Index
Mass Population Left Behind

Average trust in institutions,
Informed Public vs. Mass Population

Trusters (60-100)

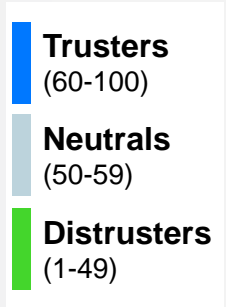**Neutrals** (50-59)

Distrusters (1-49)

Source: 2017 Edelman Trust Barometer.
The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, 28-country global total.

Informed Public

Score	Country
60	Global
80	India
79	China
78	Indonesia
77	UAE
71	Singapore
68	U.S.
62	Canada
62	Netherlands
61	Italy
61	Mexico
57	Malaysia
57	Spain
56	France
56	U.K.
55	Colombia
54	Australia
54	Germany
53	Hong Kong
51	Argentina
51	Brazil
50	S. Korea
50	Turkey
49	Japan
49	S. Africa
47	Sweden
45	Russia
44	Ireland
43	Poland

Mass Population

Score	Country
45	Global
70	India
67	Indonesia
62	China
59	Singapore
59	UAE
52	Netherlands
50	Colombia
50	Mexico
47	Brazil
47	Canada
47	Italy
47	Malaysia
47	U.S.
45	Argentina
42	Hong Kong
41	S. Africa
41	Spain
41	Turkey
40	Australia
39	Germany
38	France
37	U.K.
36	S. Korea
36	Sweden
35	Ireland
34	Japan
34	Poland
31	Russia

The Mass Population distrusts their institutions in 20 of 28 countries

3

Trust Index
A World of Distrust

Average trust in institutions,
General Population, 2016 vs. 2017

Trusters
(60-100)

Neutrals
(50-59)

Distrusters
(1-49)

2016	
50	**Global**
73	China
66	UAE
65	India
64	Singapore
62	Indonesia
60	Mexico
56	Canada
55	Colombia
52	Netherlands
51	Argentina
51	Malaysia
50	Brazil
49	Australia
49	Italy
49	U.S.
47	Hong Kong
46	Spain
45	S. Africa
42	Germany
42	S. Korea
42	U.K.
41	France
41	Ireland
41	Turkey
39	Russia
38	Japan
37	Sweden
35	Poland

2017	
47	**Global**
72	India
69	Indonesia
67	China
60	Singapore
60	UAE
53	Netherlands
52	Mexico
52	U.S.
50	Colombia
49	Canada
48	Brazil
48	Italy
48	Malaysia
45	Argentina
44	Hong Kong
44	Spain
43	Turkey
42	Australia
42	S. Africa
41	Germany
40	France
40	U.K.
38	S. Korea
37	Sweden
36	Ireland
35	Japan
35	Poland
34	Russia

3-point decrease in the global Trust Index

Trust declines in 21 of 28 countries—the broadest declines since beginning General Population tracking in 2012

2 in 3 countries are now distrusters

Source: 2017 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.

4

Trust in Media Plunges to All-Time Lows

Percent trust in media, and change from 2016 to 2017
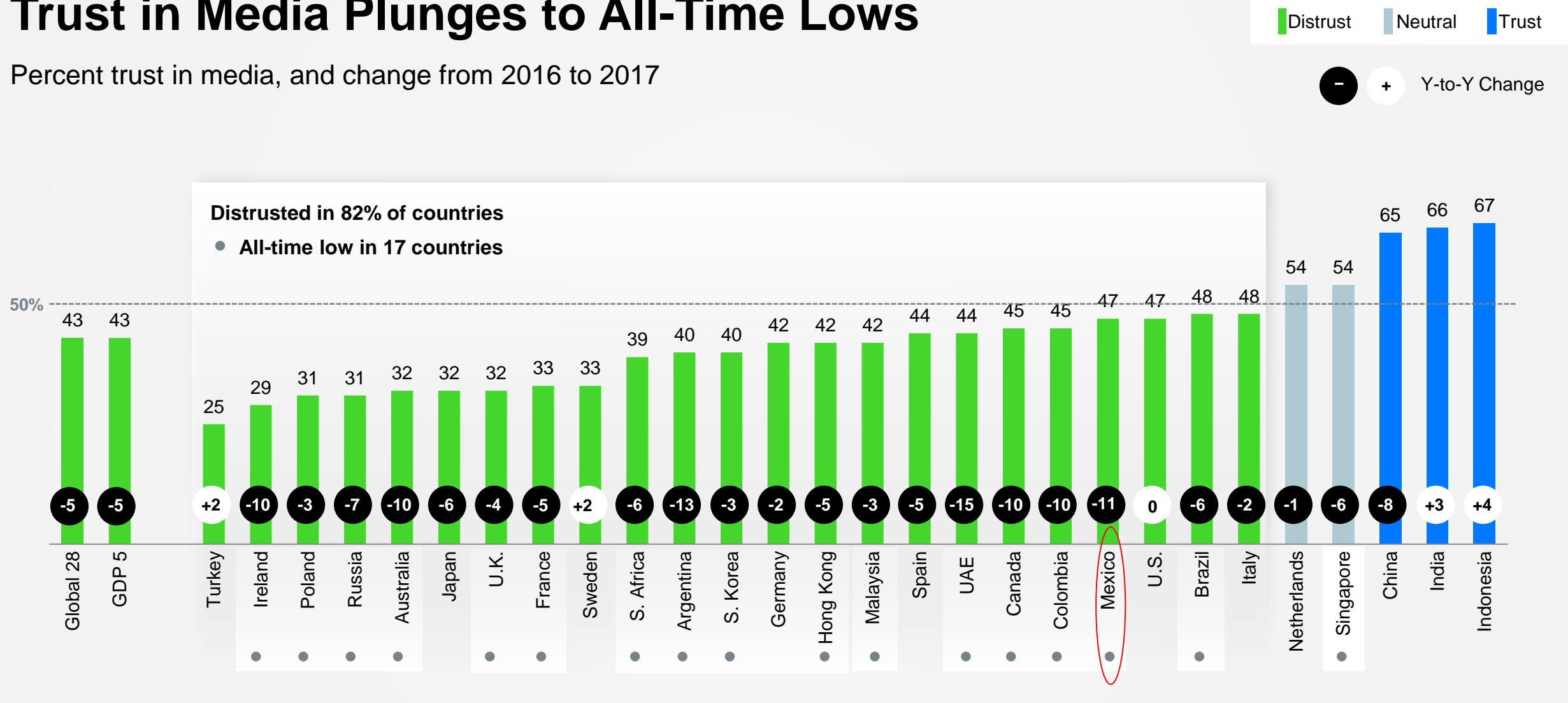
■ Distrust ■ Neutral ■ Trust

● − ○ + Y-to-Y Change
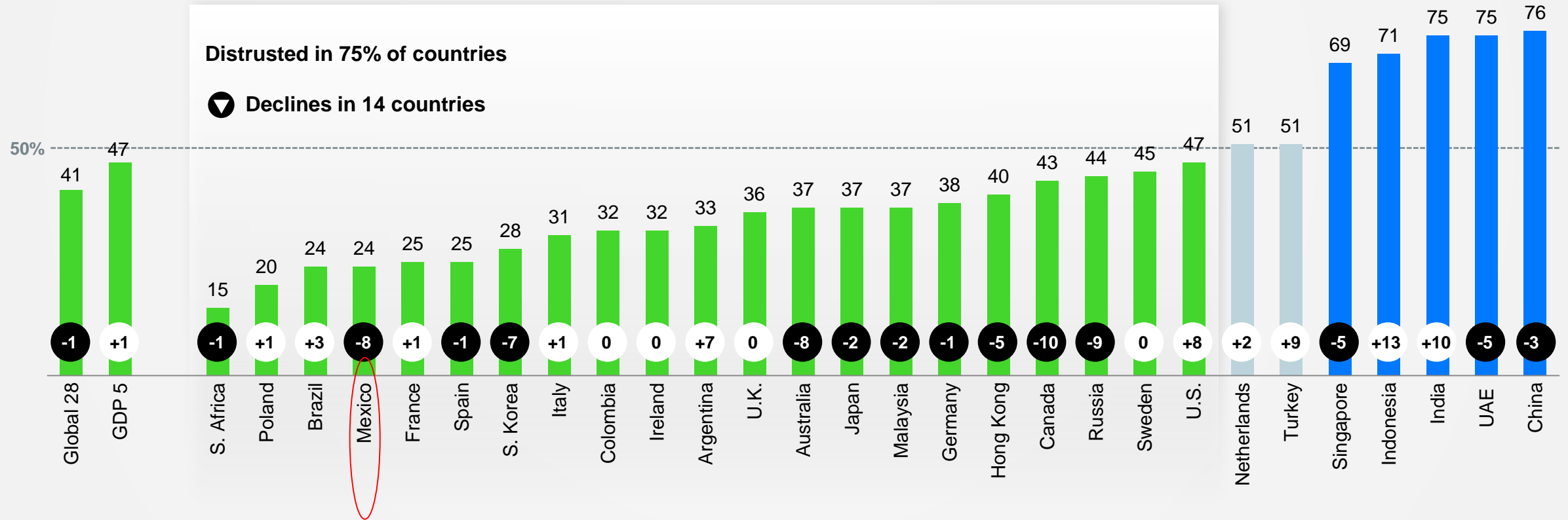
Distrusted in 82% of countries

● **All-time low in 17 countries**

Country	Value	Y-to-Y Change
Global 28	43	-5
GDP 5	43	-5
Turkey	25	+2
Ireland	29	-10
Poland	31	-3
Russia	31	-7
Australia	32	-10
Japan	32	-6
U.K.	32	-4
France	33	-5
Sweden	33	+2
S. Africa	39	-6
Argentina	40	-13
S. Korea	40	-3
Germany	42	-2
Hong Kong	42	-5
Malaysia	42	-3
Spain	44	-5
UAE	44	-15
Canada	45	-10
Colombia	45	-10
Mexico	47	-11
U.S.	47	0
Brazil	48	-6
Italy	48	-2
Netherlands	54	-1
Singapore	54	-6
China	65	-8
India	66	+3
Indonesia	67	+4

50%

Trust in Government Further Evaporates

Percent trust in government, and change from 2016 to 2017

Distrusted in 75% of countries

▼ **Declines in 14 countries**

Country	Value	Change
Global 28	41	-1
GDP 5	47	+1
S. Africa	15	-1
Poland	20	+1
Brazil	24	+3
Mexico	24	-8
France	25	+1
Spain	25	-1
S. Korea	28	-7
Italy	31	+1
Colombia	32	0
Ireland	32	0
Argentina	33	+7
U.K.	36	0
Australia	37	-8
Japan	37	-2
Malaysia	37	-2
Germany	38	-1
Hong Kong	40	-5
Canada	43	-10
Russia	44	-9
Sweden	45	0
U.S.	47	+8
Netherlands	51	+2
Turkey	51	+9
Singapore	69	-5
Indonesia	71	+13
India	75	+10
UAE	75	-5
China	76	-3

50%

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Trust in NGOs Declines

Percent trust in NGOs, and change from 2016 to 2017
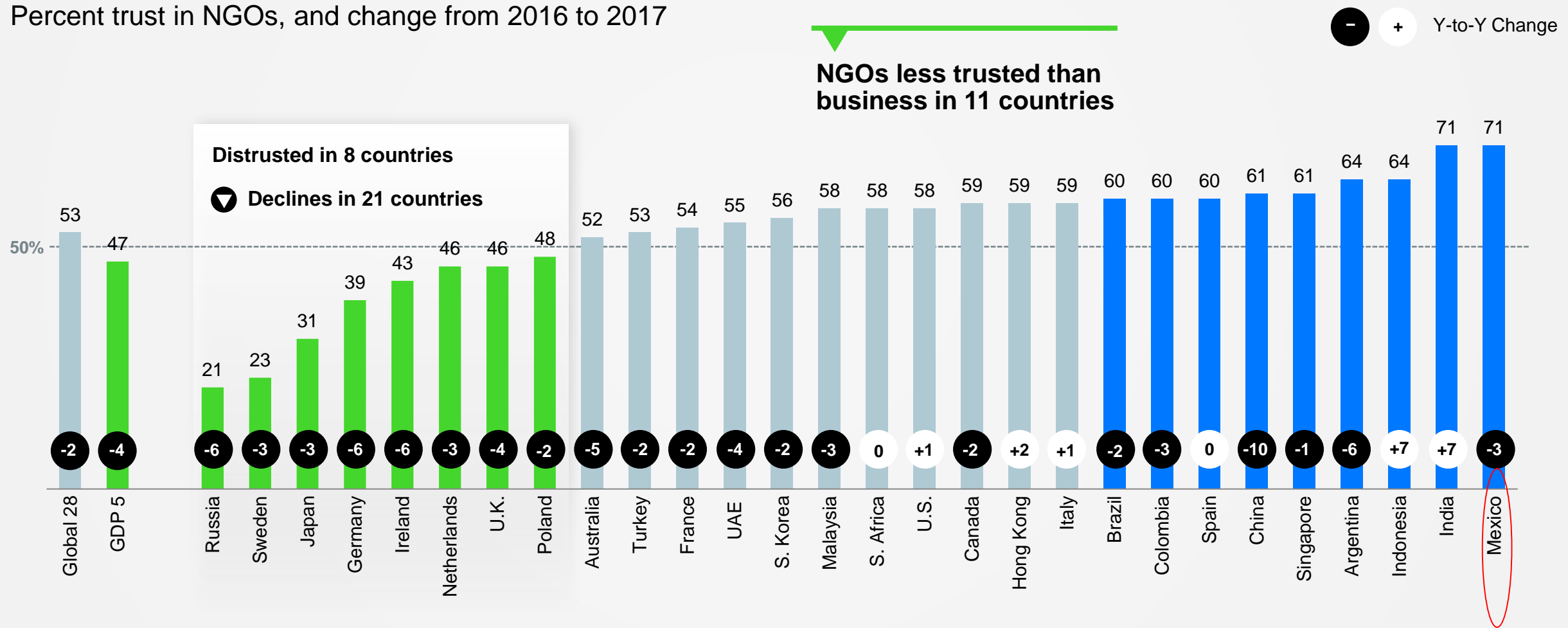
Legend: Distrust (green) · Neutral (grey) · Trust (blue)

- / + Y-to-Y Change

NGOs less trusted than business in 11 countries

Distrusted in 8 countries

▼ **Declines in 21 countries**

50%

Country	Value	Y-to-Y Change
Global 28	53	-2
GDP 5	47	-4
Russia	21	-6
Sweden	23	-3
Japan	31	-3
Germany	39	-6
Ireland	43	-6
Netherlands	46	-3
U.K.	46	-4
Poland	48	-2
Australia	52	-5
Turkey	53	-2
France	54	-2
UAE	55	-4
S. Korea	56	-2
Malaysia	58	-3
S. Africa	58	0
U.S.	58	+1
Canada	59	-2
Hong Kong	59	+2
Italy	59	+1
Brazil	60	-2
Colombia	60	-3
Spain	60	0
China	61	-10
Singapore	61	-1
Argentina	64	-6
Indonesia	64	+7
India	71	+7
Mexico	71	-3

Business on the Brink of Distrust

Percent trust in business, and change from 2016 to 2017

Legend: Distrust (green) · Neutral (grey) · Trust (blue)

− / + Y-to-Y Change

Distrusted in 13 countries

▽ Declines in 18 countries

50%

Country	Value	Y-to-Y Change
Global 28	52	-1
GDP 5	51	+1
S. Korea	29	-4
Hong Kong	34	-5
Russia	39	+1
Poland	40	+2
Ireland	41	-2
Japan	41	-2
Germany	43	+1
Turkey	43	+1
Argentina	45	-8
U.K.	45	-1
Spain	46	-2
Sweden	46	0
Australia	48	-4
France	50	+4
Canada	50	-6
Italy	55	-2
Malaysia	56	-2
S. Africa	56	-4
Singapore	58	-2
U.S.	58	+7
Netherlands	60	+4
Brazil	61	-3
Colombia	64	-6
UAE	64	-3
China	67	-3
Mexico	67	-9
India	74	+5
Indonesia	76	+5

Without Trust, Belief in the System Fails

Lack of Belief in System

NGOs
Business
Media
Government

Loss of Trust in Institutions

How true are each of the following?

Sense of Injustice

System biased in favor of elites, elites indifferent to the people, getting richer than they deserve

Lack of Hope

Hard work not rewarded, children will not have a better life, country not moving in right direction

Lack of Confidence

No confidence in current leaders

Desire for Change

Need forceful reformers to bring change

1 in 2 Countries Have Lost Faith in the System

Percent of population who believe the system is not working

Above global average

Aligned with global average

Below global average
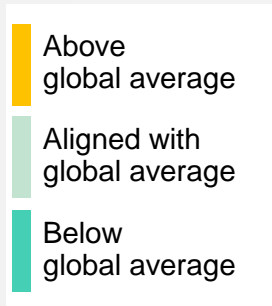
In 14 countries, the percent of population that has lost faith is above the global average

	Global	France	Italy	Mexico	S. Africa	Spain	Poland	Brazil	Colombia	Germany	U.K.	Australia	Ireland	U.S.	Netherlands	Canada	Sweden	Argentina	Malaysia	Turkey	Russia	S. Korea	Indonesia	Japan	India	Hong Kong	Singapore	China	UAE
System failing	53	72	72	67	67	67	64	62	62	62	60	59	59	57	56	55	55	53	52	51	48	48	42	42	36	35	30	23	19
Uncertain	32	22	24	25	24	25	25	25	27	26	29	30	26	33	33	30	29	29	37	31	28	41	40	45	45	50	43	47	40

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2016: The Inversion of Influence

Influence & Authority

Influence

Authority

Mass Population — 83% of population — 57 Trust Index

Informed Public — 17% of population — 72 Trust Index

15pt Gap
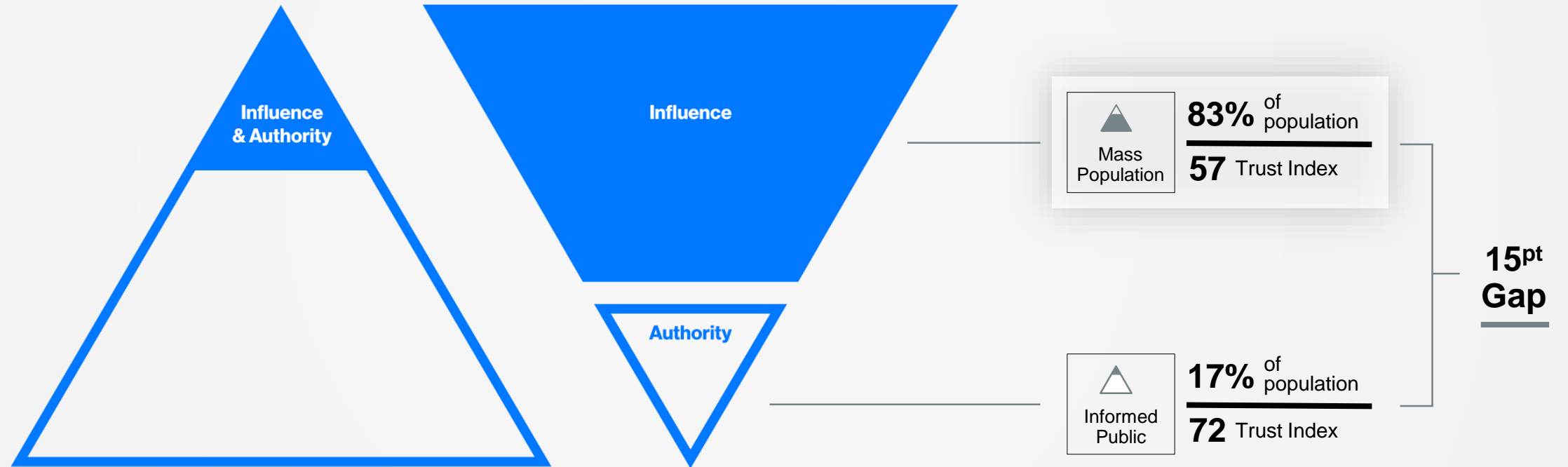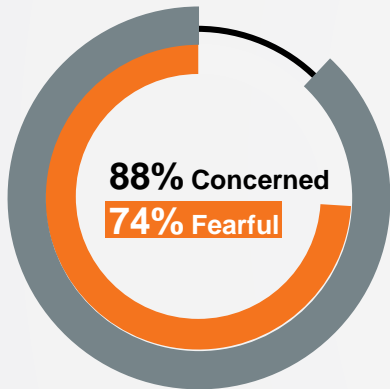
Source: 2016 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed Public and Mass Population, Mexico.

Mexico
data

2017: Double-Digit Trust Gap Continues

Percent trust in the four institutions of government, business, media and NGOs, 2012 to 2017

15^{pt} Gap

8^{pt} Gap

11^{pt} Gap
A 4-point decrease in the last year

72

63

61

55

57

50

△ Informed Public

▲ Mass Population

| 2012 | 2016 | 2017 |
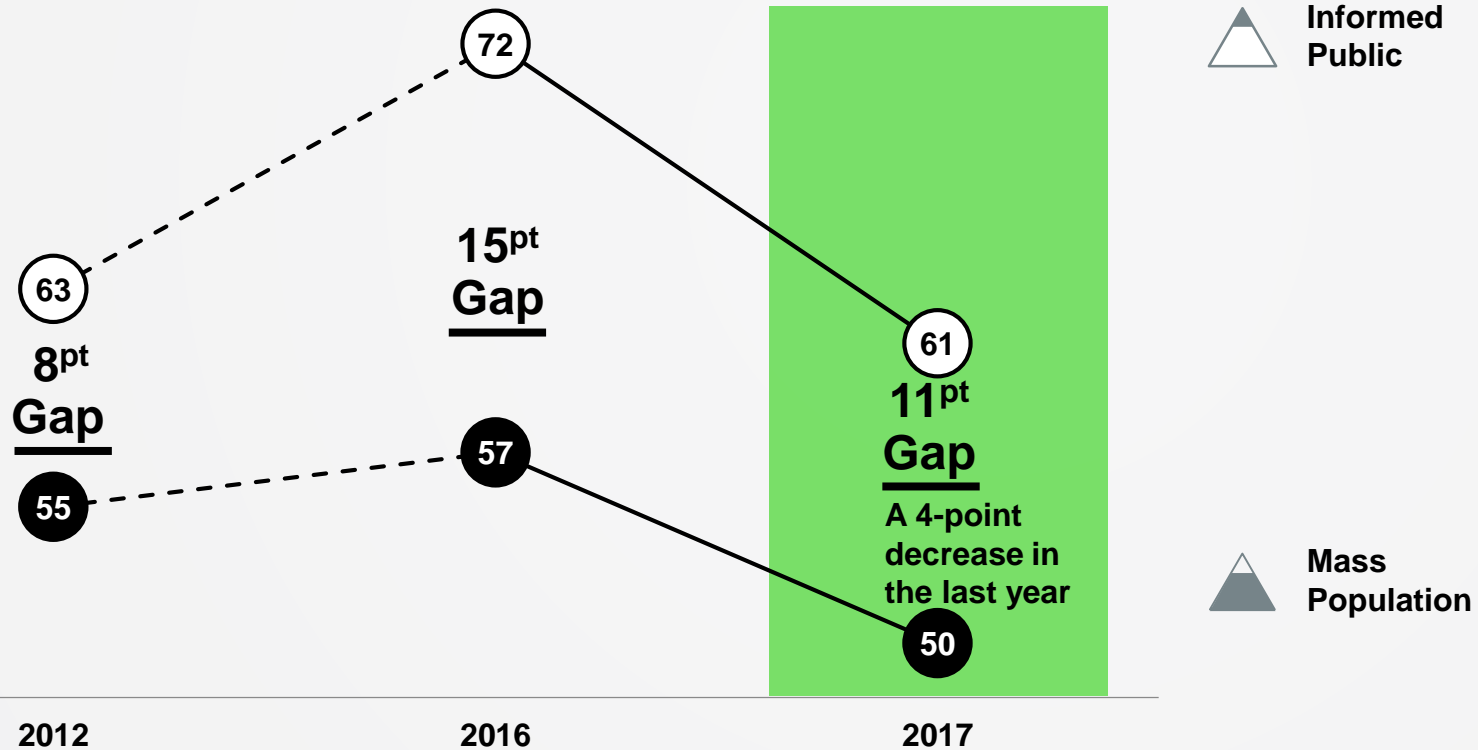
Largest Gaps

21 pts

19 pts

18 pts

Trust in All Four Institutions Declines

Percent trust in the four institutions of government,
business, media and NGOs, 2016 vs. 2017

2016   2017

Global Values
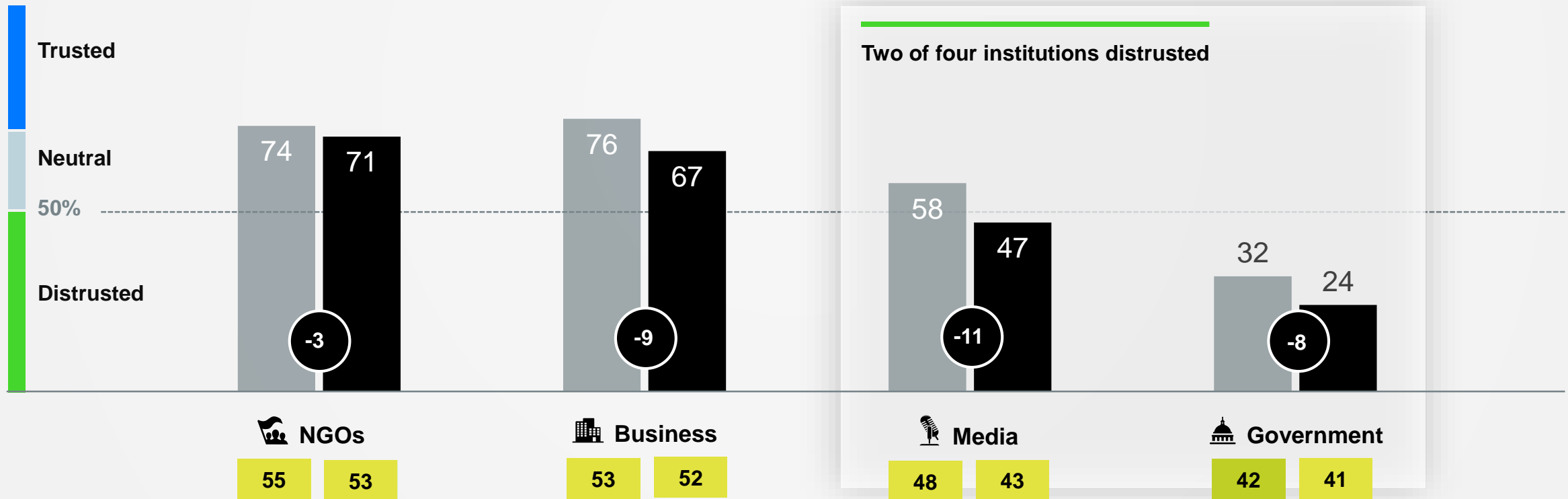
Trusted

Neutral

50%

Distrusted

Two of four institutions distrusted

	NGOs	Business	Media	Government
2016	74	76	58	32
2017	71	67	47	24
Change	-3	-9	-11	-8
Global 2016	55	53	48	42
Global 2017	53	52	43	41

Credibility of Government Leaders in Crisis

Percent who rate each spokesperson as very/extremely credible

CEOs
61%
Credible

Government Officials
20%
Credible
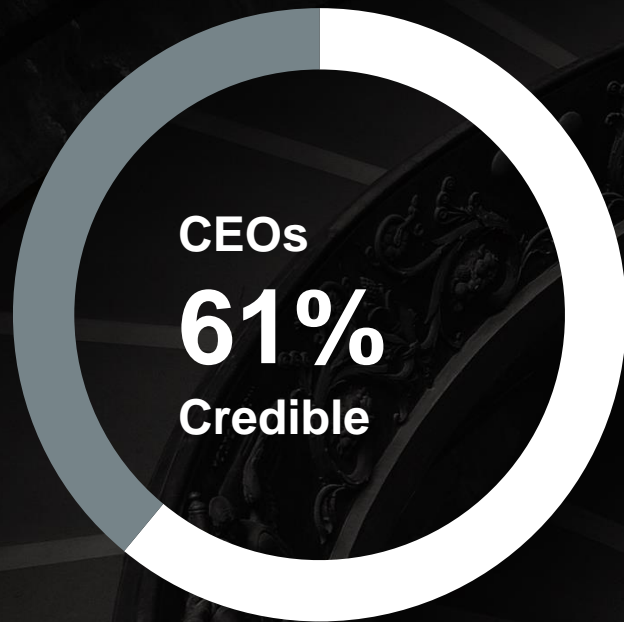
Source: 2017 Edelman Trust Barometer. Q130-747 Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible) General Population, Mexico, question asked of half the sample.

Majority Believe the System is Failing Them

How true is this for you?

- Sense of injustice
- Lack of hope
- Lack of confidence
- Desire for change
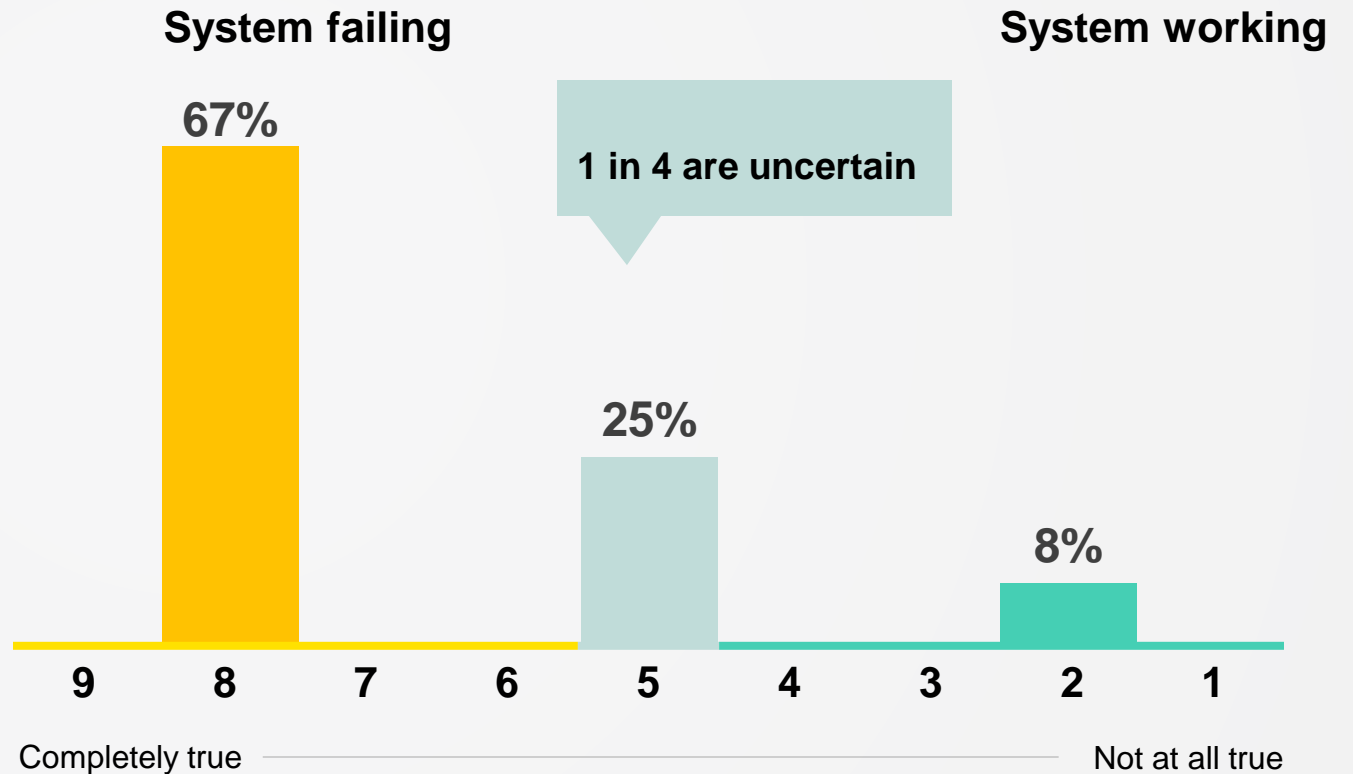
System failing

System working

67%

1 in 4 are uncertain

25%

8%

9 8 7 6 5 4 3 2 1

Completely true ———————————————— Not at all true

Even Those at the Top Are Disillusioned

Percent who believe the system is not working

High-Income	College-Educated	Well-Informed
Top quartile of income	College degree or higher	Follow business and public policy information several times a week or more
68%	68%	66%

Trust Critical to Belief in the System

Average trust in institutions

Among those who believe the **System is Failing**	Among those who are **Uncertain**	Among those who believe the **System is Working**
Trust Index **48**	Trust Index **60**	Trust Index **60**

Trust differentiates those who are uncertain and those who believe the system is failing them

Concerns Have Become Fears

Percent of respondents who are concerned or fearful regarding each issue

Corruption	Globalization	Eroding Social Values	Immigration	Pace of Innovation
88% Concerned **74%** Fearful	**58%** Concerned **27%** Fearful	**63%** Concerned **34%** Fearful	**41%** Concerned **21%** Fearful	**47%** Concerned **27%** Fearful

Corruption

Widespread corruption

Compromising the safety of our citizens

Makes it difficult to institute the changes necessary to solve our problems

Globalization
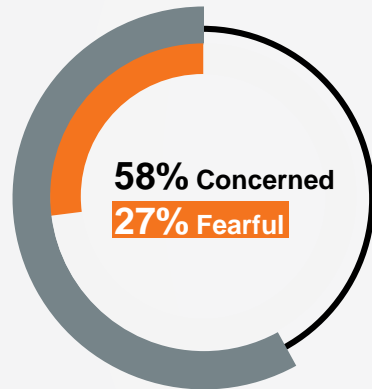
Protect our jobs from foreign competition

Foreign companies/influence damaging our economy/ national culture

Foreign corporations favor their home country

Most countries cannot be trusted to engage in fair trade practices

Eroding Social Values
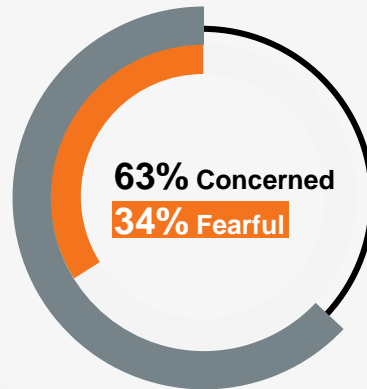
Values that made this country great are disappearing

Society changing too quickly and not in ways that benefit people like me

Immigration
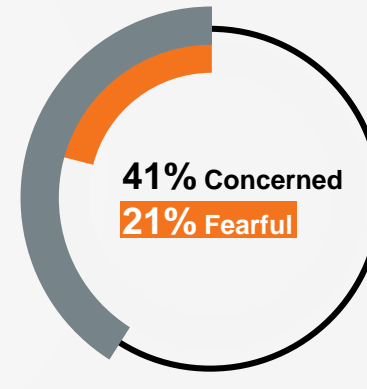
Influx of people from other countries damaging our economy and national culture

Pace of Innovation
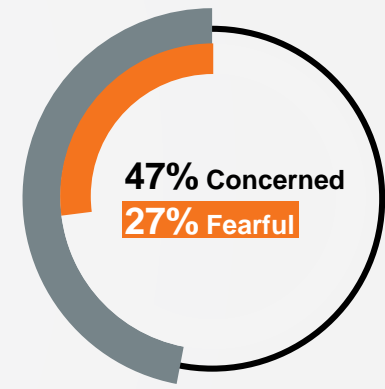
Technological innovations happening too quickly and leading to changes not good for people like me

Fears Further Erode Belief in the System

Percent of respondents with various fears who also believe the system has failed them

79	**81**	**84**	**78**	**73**
Corruption	Globalization	Eroding Social Values	Immigration	Pace of Innovation

When fears collide with a belief that the system is failing, conditions are ripe for populist action

Traditional Media Shows Steepest Decline

Percent trust in each source for general news and information

		2012	2017	Change, 2012 - 2017
■	Search engines*	78	80	+2
■	Online-only media**	67	70	+3
■	Owned media	65	68	+3
■	Traditional media	73	64	-9
■	Social media	61	57	-4
■	**Media as an institution**	**56**	**47**	**-9**
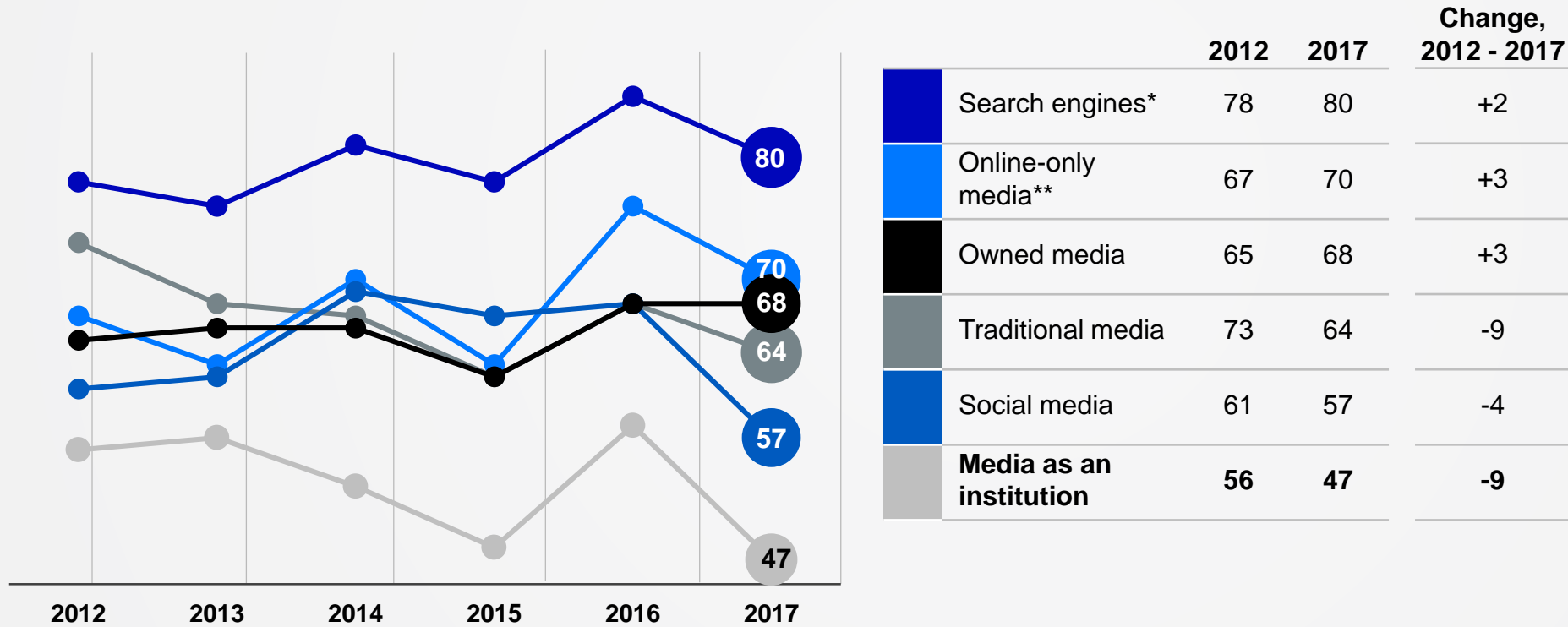
Traditional media down 9 points

Search Engines are most trusted

*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."
**From 2012-2015, "Hybrid Media" was included as a media type. In 2016, this was changed to "Online-Only media."

Official Sources Are Suspect

Percent who find each source more believable than its pair
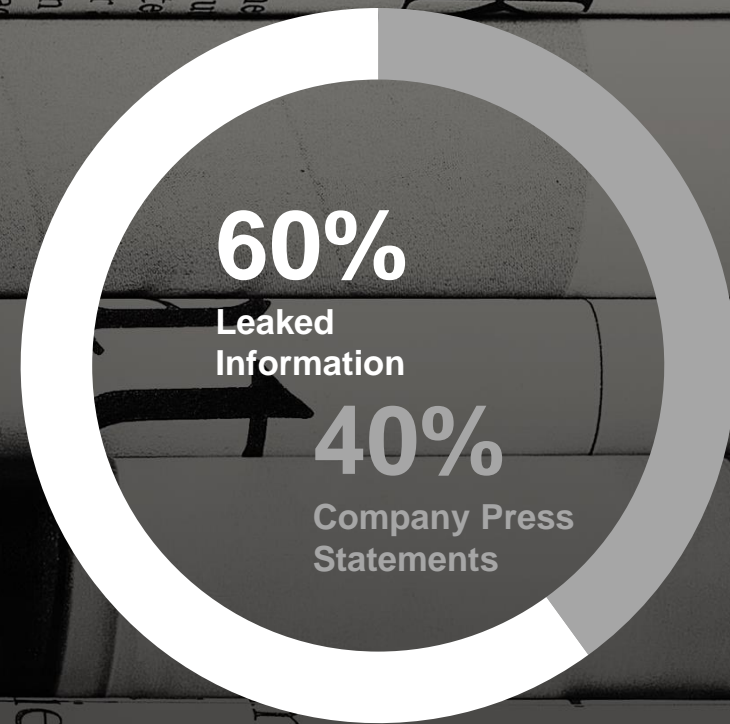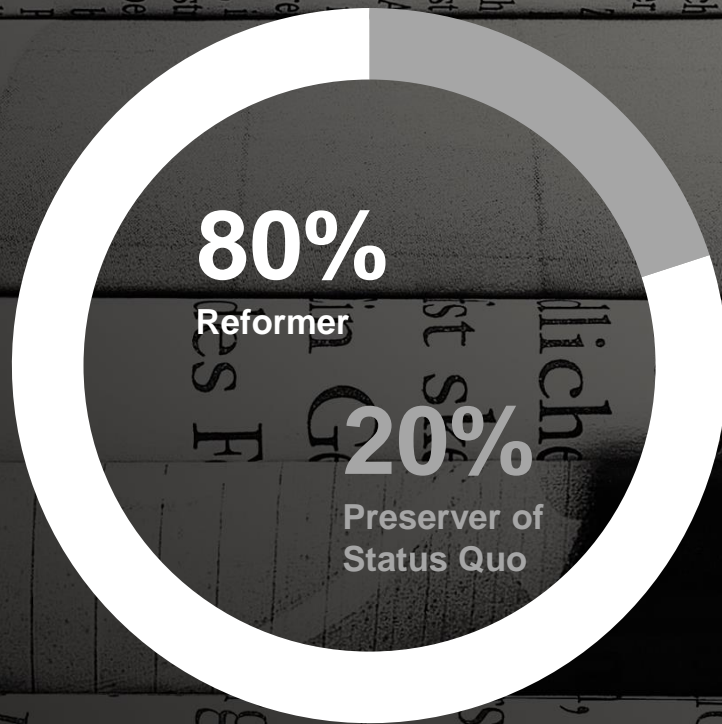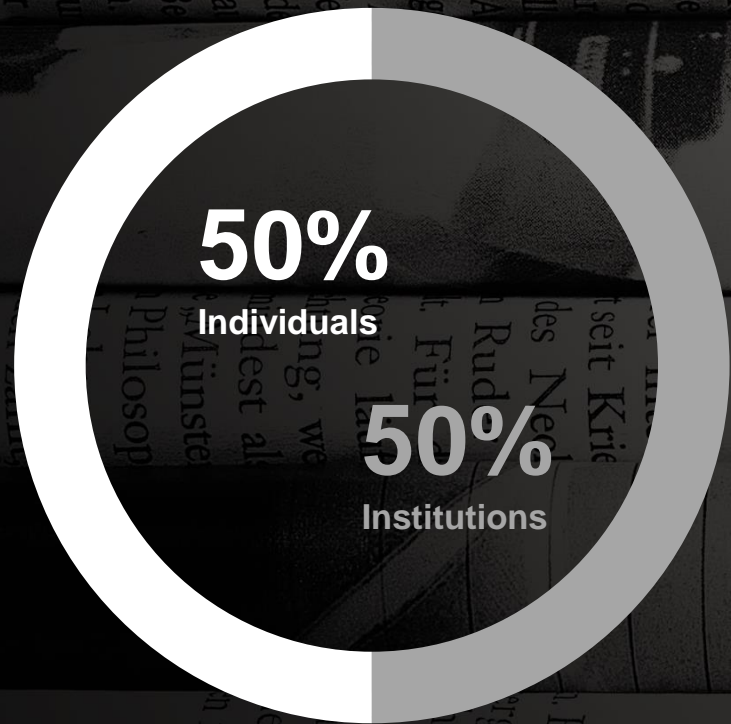
50%
Individuals

50%
Institutions

80%
Reformer

20%
Preserver of Status Quo

60%
Leaked Information

40%
Company Press Statements

Peers More Credible Than CEOs and Gov.t Officials

Percent who rate each spokesperson as extremely/very credible,
and change from 2016 to 2017

− + Y-to-Y Change

CEO credibility decreased the
most, dropping to an all-time low

Academic expert	Technical expert	A person like yourself	Financial industry analyst	Employee	NGO representative	CEO	Board of directors	Government official/ regulator
85	83	77	73	72	69	61	60	20
+1	0	+1	-4	-5	0	-15	-8	-14

Business Plays a Role in Stoking Societal Fears

Global population worries about
losing their jobs due to:

Category	Percentage
Lack of training/skills	**76%**
Foreign competitors	**75%**
Jobs moving to cheaper markets	**72%**
Automation	**66%**
Immigrants who work for less	**62%**

57% the pace of change

in business and industry is
too fast

52% globalization

is taking us in the
wrong direction

Support for Anti-Business Policies

Protectionism

41% agree

"We should not enter into free trade agreements because they hurt our country's workers."

Protectionism

79% agree

"We need to prioritize the interests of our country over those of the rest of the world."

Slower Growth

74% agree

"The government should protect our jobs and local industries, even if it means that our economy grows more slowly."

Business Expected to Lead

88% agree
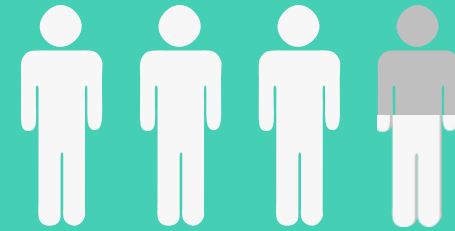
"A company can take specific actions that both increase profits and improve the economic and social conditions in the community where it operates."

NGOs Followed Closely by Business Most Trusted

■Distrust ▌Neutral ▌Trust

	Among those who believe the **System is Failing**	Among those who are **Uncertain**	Among those who believe the **System is Working**
% trust in each institution			
NGOs	69 ▌ Most Trusted	75 ▌ Most Trusted	70 ▌ Most Trusted
Business	65 ▌	73 ▌	66 ▌
Media	43 ▌	54 ▌	57 ▌
Government	17 ▌	36 ▌	45 ▌
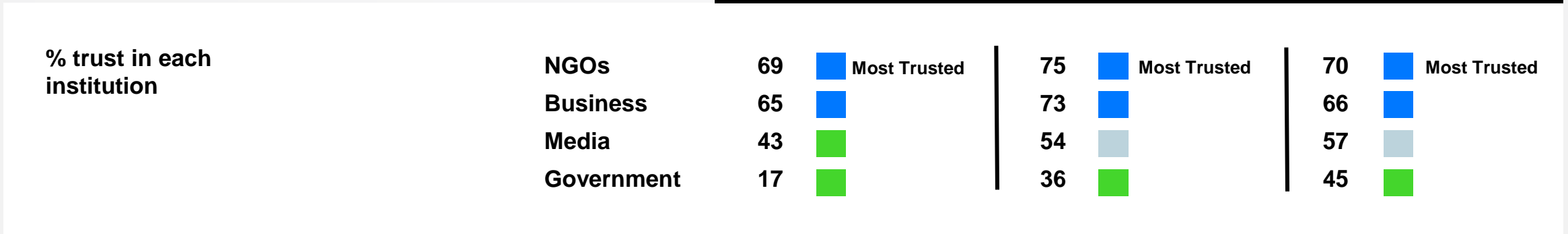
NGOs are most trusted among the 1 in 4 who are uncertain about the system

First, Do No Harm

Actions business can take that would most damage trust in a better future (top 5 most-selected)

1. Pay bribes to government officials to win contracts

2. Reduce employees' benefits

3. Reduce costs by lowering product quality

4. Move profits to other countries to avoid paying taxes

5. Reduce costs by cutting jobs

When the System is Failing, Companies Must Do More

Percent who rate each attribute as important in **building trust in a company** (top 5 most important shown)

Attribute	System Failing	General Population
Offers high quality products or services	83	79
Treats employees well	80	77
Listens to customer needs and feedback	80	77
Has ethical business practices	78	74
Works to protect and improve the environment	78	74

On average

+4 pts

higher expectations

Among those who have lost faith in the system, expectations are higher across the board

Employees Most Credible Across Majority of Topics
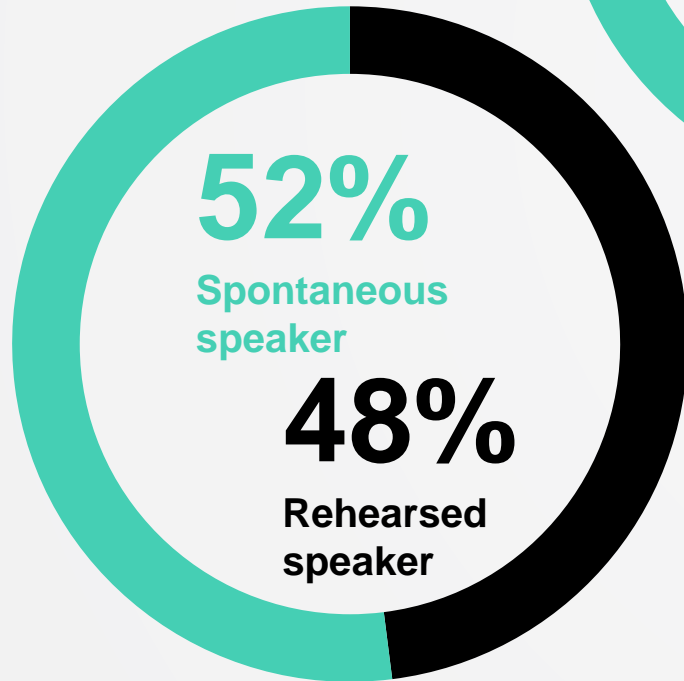
Most trusted spokesperson to communicate each topic

Legend:
- Company CEO
- Senior executive
- Employee
- Activist consumer
- Academic
- Media spokesperson

Treatment of employees/customers: 24, 25, 54, 39, 20, 5

Financial earnings & operational performance: 31, 22, 43, 38, 27, 5

Business practices/crisis handling: 32, 22, 38, 37, 29, 6

Innovation efforts: 33, 35, 33, 38, 19, 8

Views on industry issues: 43, 32, 30, 22, 28, 9

Partnerships/programs to address societal issues: 28, 24, 36, 32, 31, 13

Talk With, Not At

Which is more believable?

40%
Blunt and outspoken
60%
Diplomatic and polite

67%
Company's social media
33%
Advertising

52%
Spontaneous speaker
48%
Rehearsed speaker

42%
Personal experience
58%
Data

Thank You