



# AN EXTERNAL VIEW OF TRUST: EDELMAN SESSION

## JULY 2015

For more information please  
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# EDELMAN UK

- **500+** consultants
- **HEADS** of Public Affairs, Technology, Brand, Corporate Reputation, Digital, Employee Engagement, Crisis based in our London **HUB OFFICE**
- A unique agency offering global research, research based approach to communications and an unparalleled events programme

## DELIVERING AWARD WINNING WORK

- **International Agency of the Year 2013** (PRCA UK)
- **European Agency of the Year, European Excellence Awards 2013**
- **Best Pan-European Agency to work for** (Holmes Report 2013)
- **3 Cannes Lions Gold** (Cannes Lions 2013)



# WHY WE'RE HERE TODAY

To introduce our Trust Barometer, and some of its key learnings

To show you why Trust matters, and what drives it

To talk to you about our experience in other sectors

# Introducing the Edelman Trust Barometer & Overall Learnings

# EDELMAN'S 15<sup>th</sup> Annual TRUST BAROMETER

We fielded an additional UK study in mid-July 2015, reflecting the same sample as the Trust Barometer, to deep dive into Transport and Rail.



## *Online Survey in 27 Countries*

- 33,000 respondents
- 7 years in 20+ markets
- 10 years in 10+ markets



## *General Online Population*

- 1,000 respondents per country surveyed
- Ages 18+
- 4 years in 25+ markets



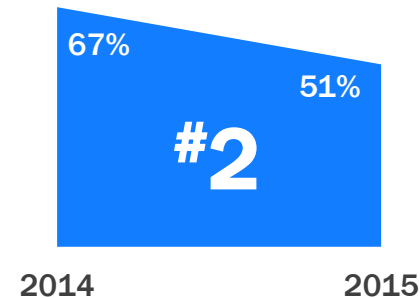
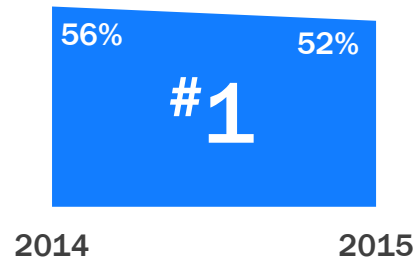
## *Informed Public*

- 500 respondents in U.S. and China, and 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
- 15 years of data

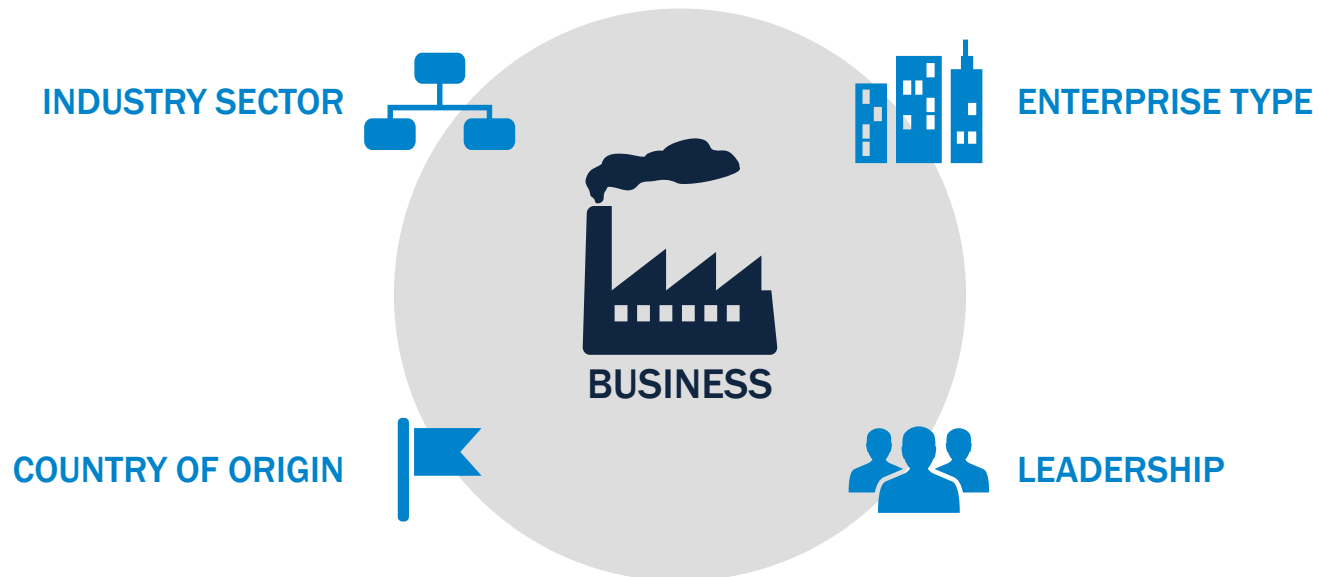
# TRUST IN INSTITUTIONS:

## UK TRUST IN BUSINESSES IS DROPPING, AND IT NEEDS TO BE AN AREA OF FOCUS

TRUST IN THE FOUR INSTITUTIONS OF GOVERNMENT, BUSINESS, MEDIA AND NGOS IN UK, 2014 VS. 2015



# FOUR KEY FACTORS AFFECT TRUST IN BUSINESS



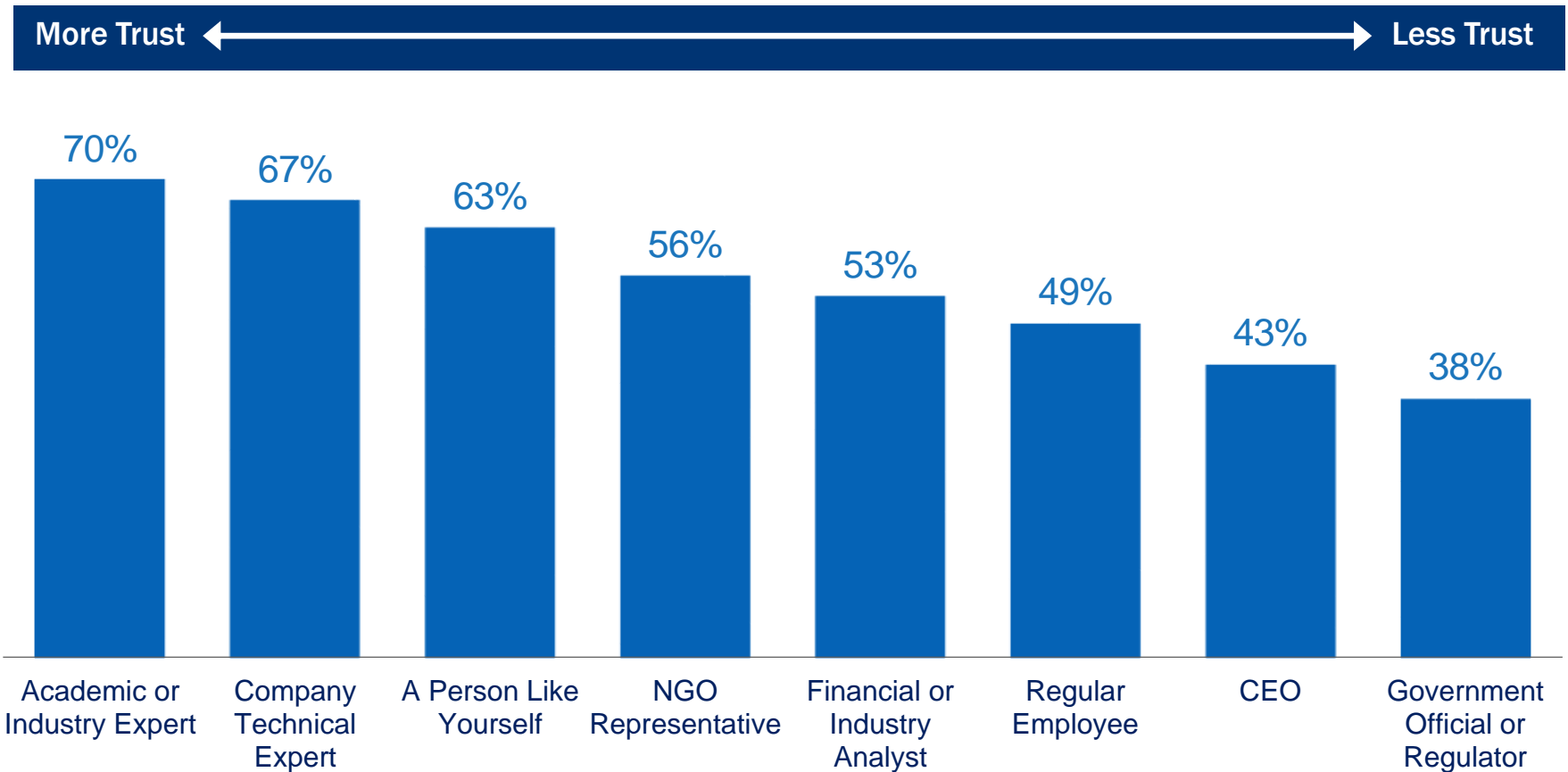
**All are showing** similar patterns of a post-recovery increase in trust, followed by new declines in the last 12 – 18 months

# LEADERSHIP: EXPERT AND “A PERSON LIKE YOURSELF” MORE CREDIBLE THAN CEO

## CREDIBILITY OF SPOKESPERSONS



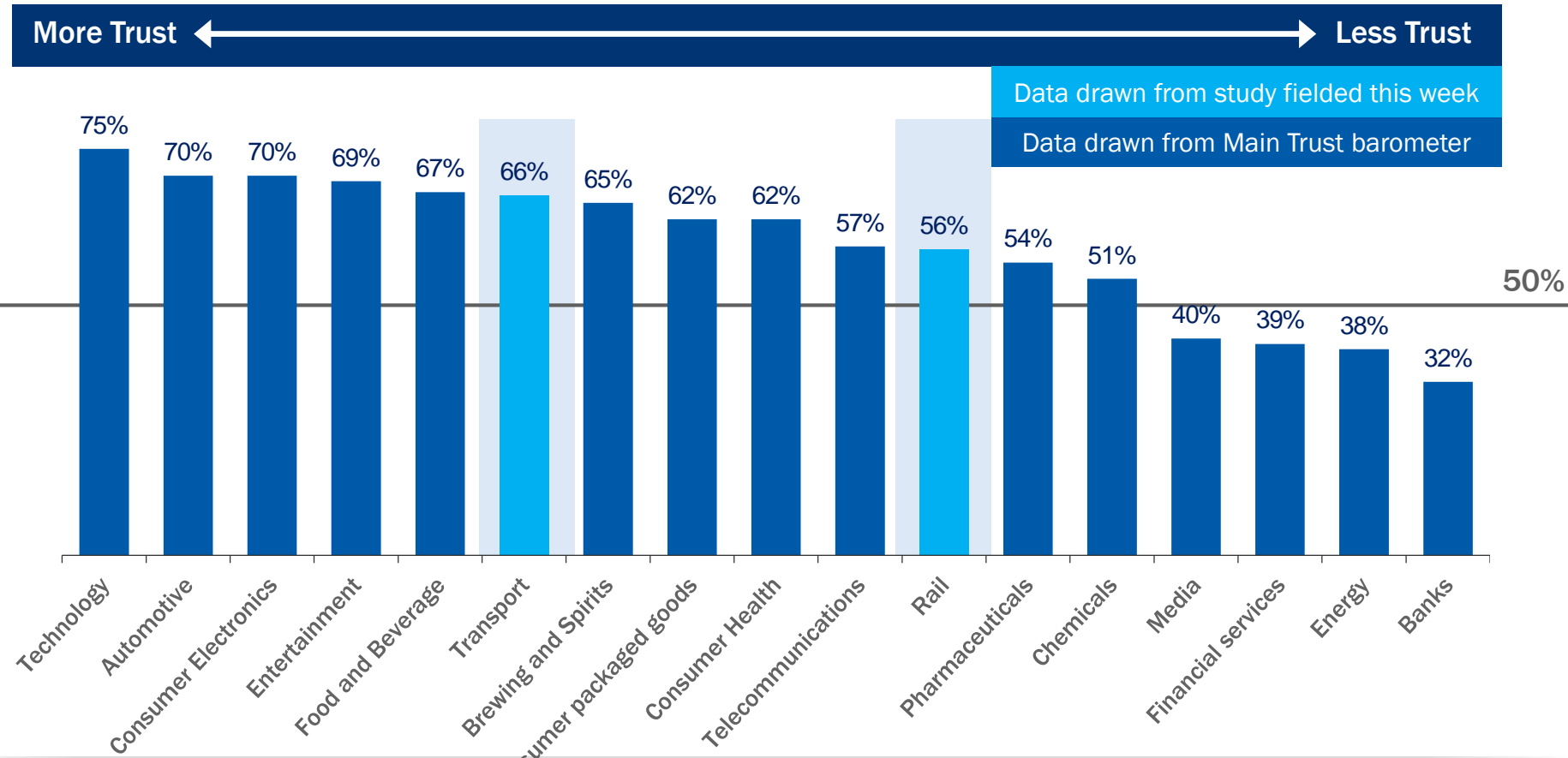
Informed  
Public  
GLOBAL  
DATA



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, 27-country global total.

# INDUSTRY SECTOR TRUST:

## TRANSPORT AND RAIL ARE FAIRLY WELL TRUSTED, BUT THERE IS OPPORTUNITY FOR IMPROVEMENT



RAIL DELIVERY GROUP STUDY: JULY 2015 Q1: Please indicate how much you trust businesses in each of the following industries to do what is right. (Top 4 Box, Trust) UK Informed Public, N=100.

MAIN TRUST BAROMETER 2015: UK DATA. 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 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 Publics

**Trust – How to build it and what  
drives it?**

# 16 KEY ATTRIBUTES TO BUILDING TRUST

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

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

## INTEGRITY

- Has ethical business practices
- Takes responsible actions to address an issue or crisis
- Has transparent and open business practices

## 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

## 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 3<sup>rd</sup> 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

# 16 KEY ATTRIBUTES TO BUILDING TRUST

Our two areas of focus for  
today

## INTEGRITY

Has ethical business practices

Takes responsible actions to address an issue or crisis

Has transparent and open business practices

## ENGAGEMENT

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**Transport and Rail Industry focus**

# KEY INDUSTRY FINDINGS: TRANSPORT AND RAIL INDUSTRIES

## Overall trust levels in transport and rail

In the UK, the **transport** industry is more trusted than the **rail** industry. When looking at overall levels of trust in industry sectors, both the transport and rail industries score fairly well.

## Transport and Rail regulation

Nearly half of the UK population think that there is not enough regulation in the transport and rail industries. There is a perception that there is room for both industries to become more active and engaged participants in the broader debate over UK transport policy.

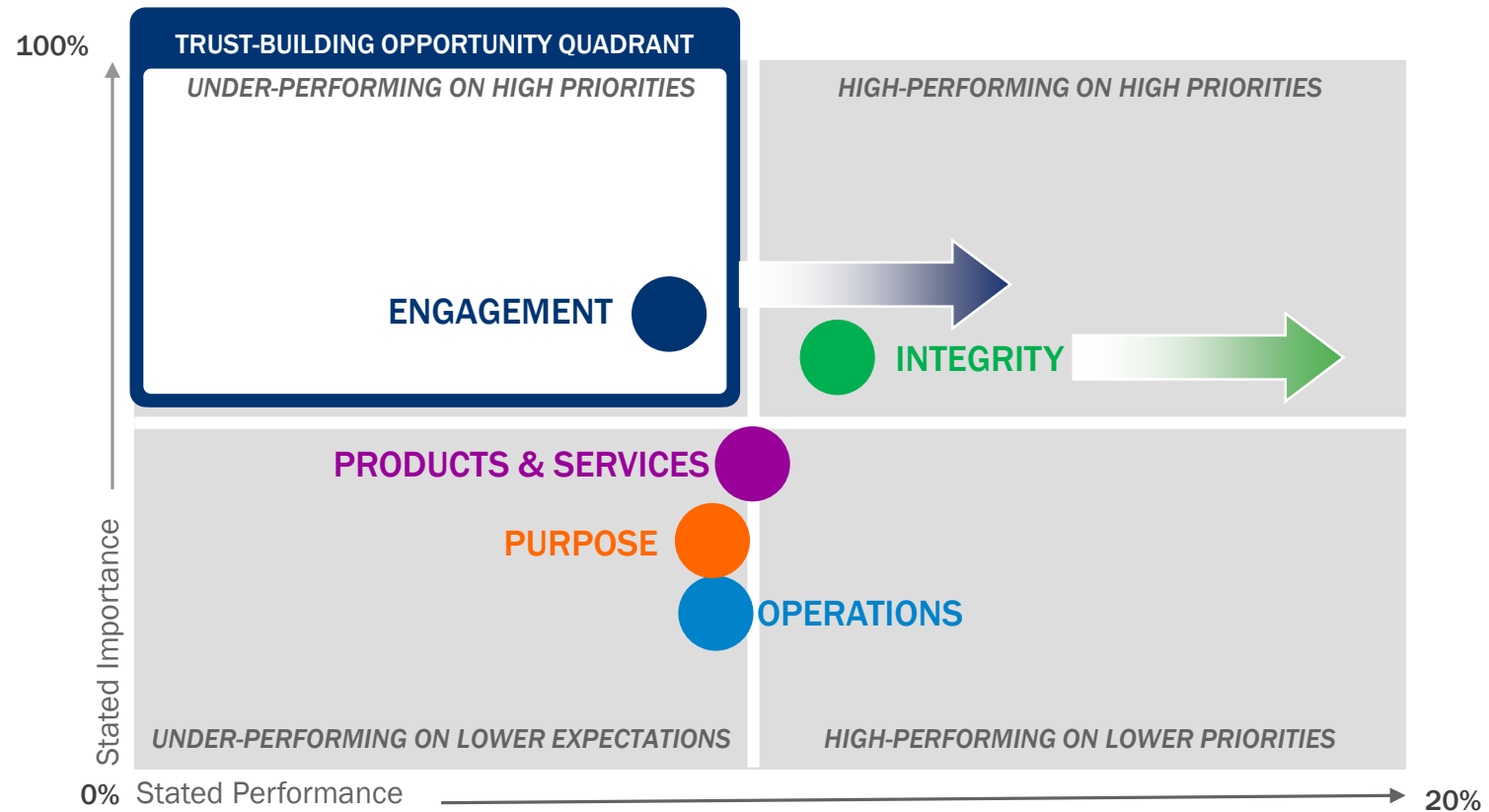
## Transport and rail performance against attributes of trust

The rail and transport industries are two industries that perform quite poorly against the 16 attributes that build trust – they underscore on the performance average of ‘businesses in general’. In particular, they underperform when it comes to **Engagement** and **Products & Services**: two areas identified as high-priority areas.

Engagement

# TRANSPORT INDUSTRY: ENGAGEMENT IS A PRIORITY AREA

STATED IMPORTANCE VS. STATED PERFORMANCE ON 16 TRUST ATTRIBUTES - UK

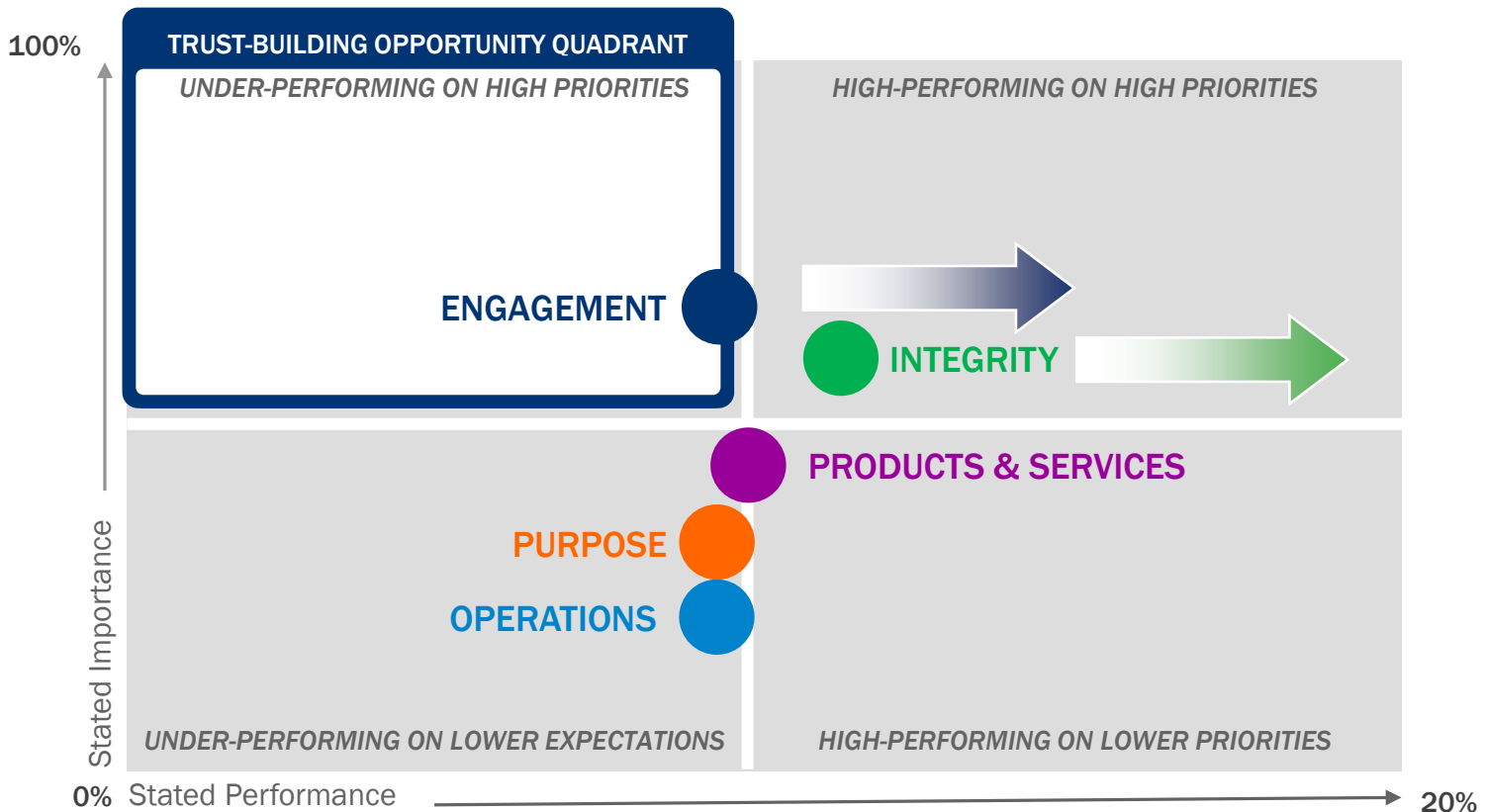


## THE AREAS OF FOCUS ARE CONSISTENT WITH THE RAIL INDUSTRY

RAIL DELIVERY GROUP STUDY: JULY 2015. Q4: Please rate the transport industry on how well you think it is performing 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 2 Box, Performing Extremely Well)  
General Public, U.K. \*Excludes don't know responses N = 1,000

# RAIL INDUSTRY: ENGAGEMENT IS A PRIORITY AREA

STATED IMPORTANCE VS. STATED PERFORMANCE ON 16 TRUST ATTRIBUTES - UK



# TRANSPORT AND RAIL INDUSTRIES: THE KEY ELEMENTS TO FOCUS ON TO BUILD TRUST IN 'ENGAGEMENT' DRIVERS ARE:

- Listening to customer needs and feedback
- Treating employees well, and letting the public know
- Placing customers ahead of profits
- Communicating frequently and honestly on the state of your business

# TRANSPORT AND RAIL: BOTH INDUSTRIES HAVE THE LICENSE TO ENGAGE

## TRANSPORT INDUSTRY

**75%** The **transport industry** should be a **more active** participant in the broader debate over UK transport policy

## RAIL INDUSTRY

**72%** The **rail industry** should be a **more active** participant in the broader debate over UK transport policy

# TRANSPORT AND RAIL REGULATIONS: INDUSTRY HAS THE LICENSE TO ENGAGE

TRUST LEVEL TOWARDS POLICYMAKERS ARE LOWER FOR THE GENERAL PUBLIC



## TRANSPORT INDUSTRY

### We Need More Regulation in the Transport Industry – But Don't Trust Policy Makers Alone

- 42%** Not enough government regulation of the transport industry
- 29%** Right amount of government regulation of the transport industry
- 11%** Too much government regulation of the transport industry

**40%** I trust policymakers to develop and implement appropriate regulations on the transport industry

### The Transport Industry Needs To Engage

**69%** The transport industry should be a more active participant in the broader debate over UK transport policy

## RAIL INDUSTRY

### We Need More Regulation in the Rail Industry – But Don't Trust Policy Makers Alone

- 49%** Not enough government regulation of the rail industry
- 23%** Right amount of government regulation of the rail industry
- 10%** Too much government regulation of the rail industry

**37%** I trust policymakers to develop and implement appropriate regulations on the rail industry

### The Rail Industry Needs To Engage

**64%** The rail industry should be a more active participant in the broader debate over UK transport policy

RAIL DELIVERY GROUP STUDY: JULY 2015 Q2: We'd like to ask you some questions about the transport industry. When it comes to government regulation of the transport industry, do you think that the government regulates it too much, not enough or the right amount? UK General Public N=1000. Q3: To what extent do you agree or disagree with the following statements? (TOP 4 box, Agree) N=1000.

RAIL DELIVERY GROUP STUDY: JULY 2015 Q5: We'd like to ask you some questions about the rail industry specifically. When it comes to government regulation of the rail industry, do you think that the government regulates it too much, not enough or the right amount? UK General Public N=1000. Q6: To what extent do you agree or disagree with the following statements? (TOP 4 box, Agree) N=1000  
Don't knows are not show but are included percentages

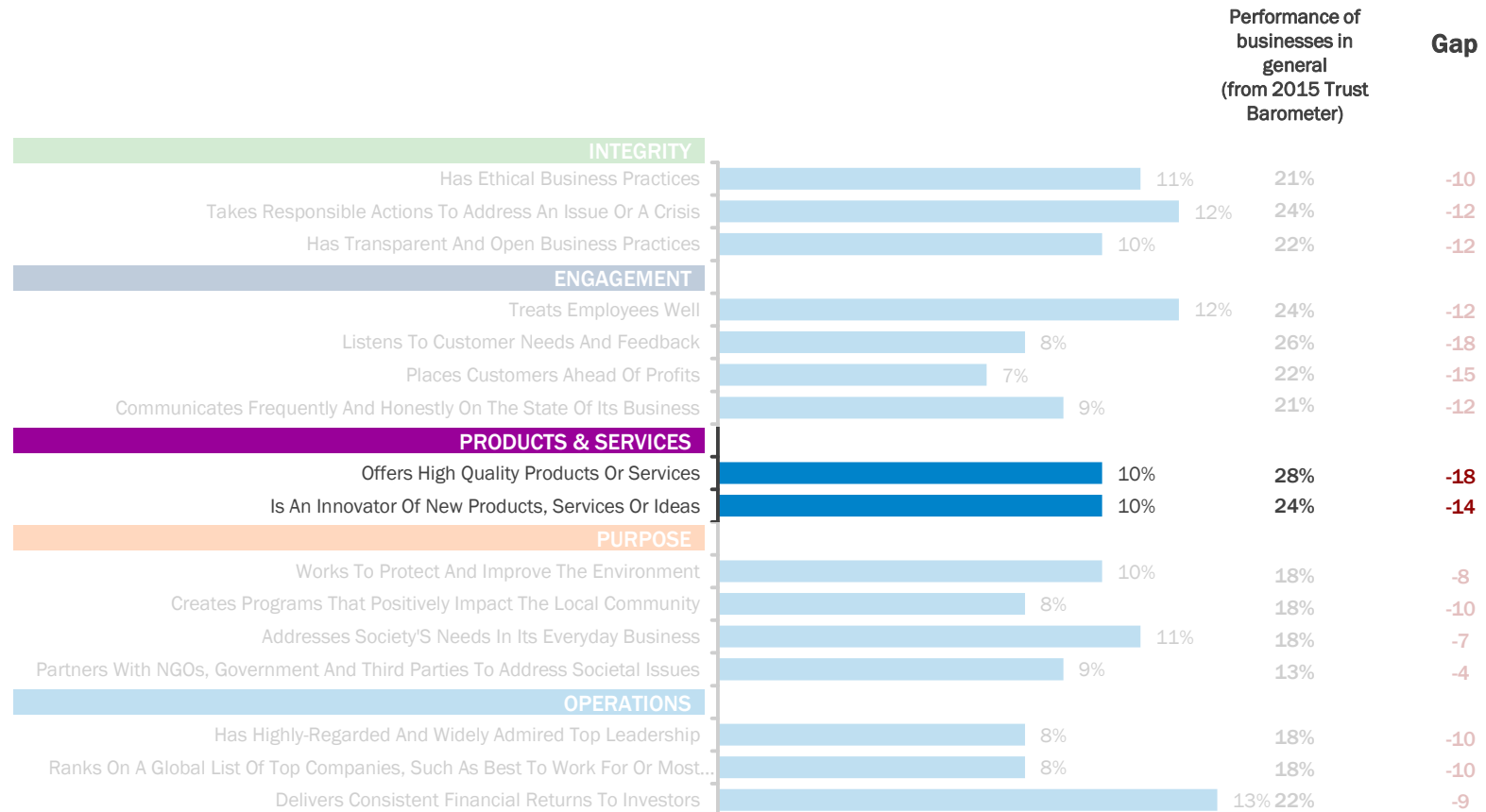
**Products & Services**

# THE INDUSTRY SCORES FAIRLY LOW ON ATTRIBUTES OF TRUST ON PRODUCTS & SERVICES:

THE AREAS TO FOCUS ON ARE HIGH QUALITY AND INNOVATION



## TRANSPORT INDUSTRY



Data shown in blue bars: RAIL DELIVERY GROUP STUDY: JULY 2015 Q4: Please rate the transport industry on how well you think it is performing 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 2 Box, Performing Extremely Well) General Public, U.K. \*Excludes don't know responses N = 1,000

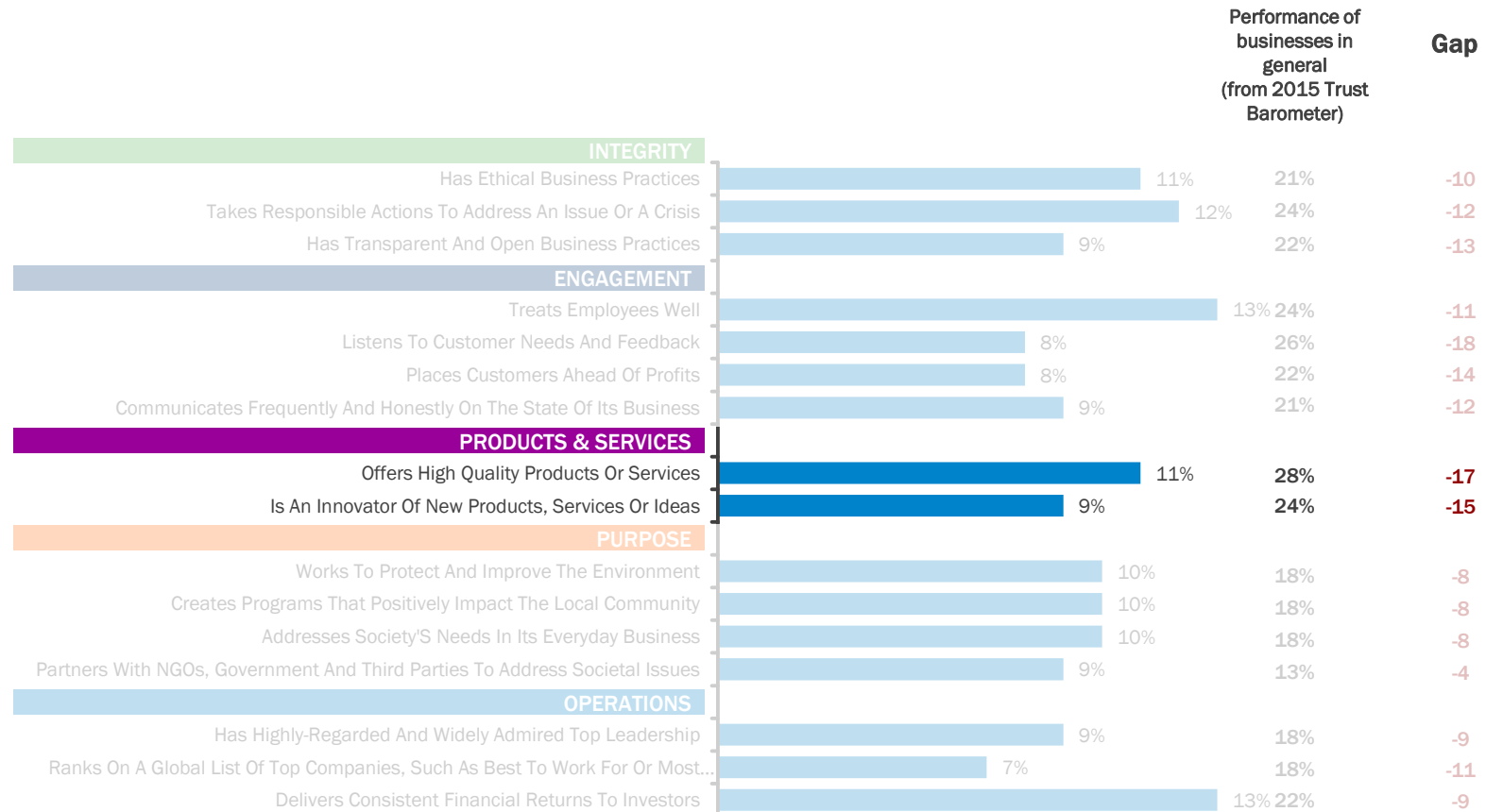
Data shown in column from Trust UK Survey: Q114-129. Please rate businesses in general on how well you think they are performing on each of the following attributes. Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". (Top 2 Box, Performing Extremely Well) General Population, U.K.\*Excludes don't know responses

# THE INDUSTRY SCORES FAIRLY LOW ON ATTRIBUTES OF TRUST ON PRODUCTS & SERVICES:

THE AREAS TO FOCUS ON ARE HIGH QUALITY AND INNOVATION



## RAIL INDUSTRY



Data shown in blue bars from RAIL DELIVERY GROUP STUDY: JULY 2015 : Q7: Please rate the rail industry on how well you think it is performing 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 2 Box, Performing Extremely Well) General Public, U.K. \*Excludes don't know responses N=1,000

Data shown in column from Trust UK Survey: 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) General Population, U.K.\*Excludes don't know responses

**Discussion**



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