Edelman trustbarometer

2014 | ANNUAL GLOBAL STUDY

Australia | #EdelTrust

ABOUT EDELMAN'S 14TH ANNUAL TRUST BAROMETER SURVEY

Legend

GLOBAL RESPONSE

The 2014 Edelman Trust Barometer surveyed 33,000 people online across 27 countries between October 16 – November 2013.

INFORMED PUBLICS

Edelman surveys an informed public demographic which meet the following criteria: university educated; household income in top quartile for age; read or watch business/news media at least several times a week; follow public policy issues several times per week. 500 respondents interviewed in the U.S. and China and 200 in other markets including Australia.

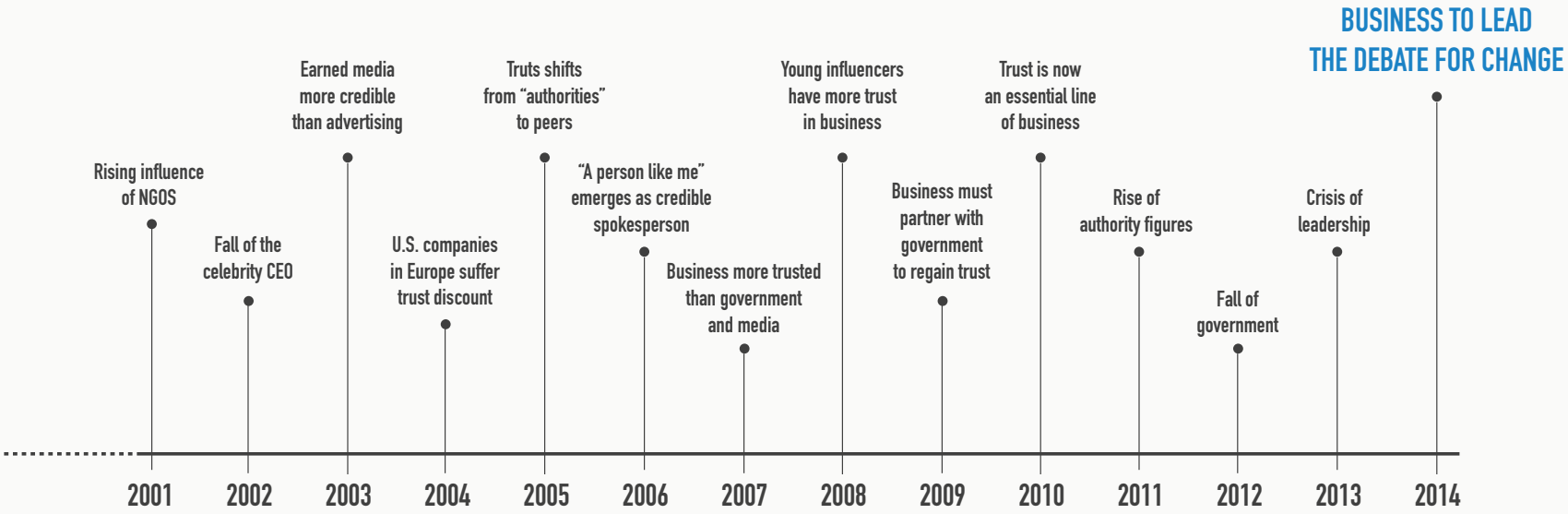
AUSTRALIA RESPONSE

In Australia we have collected six years of data with the informed public and three years of data with the general population.

GENERAL POPULATION

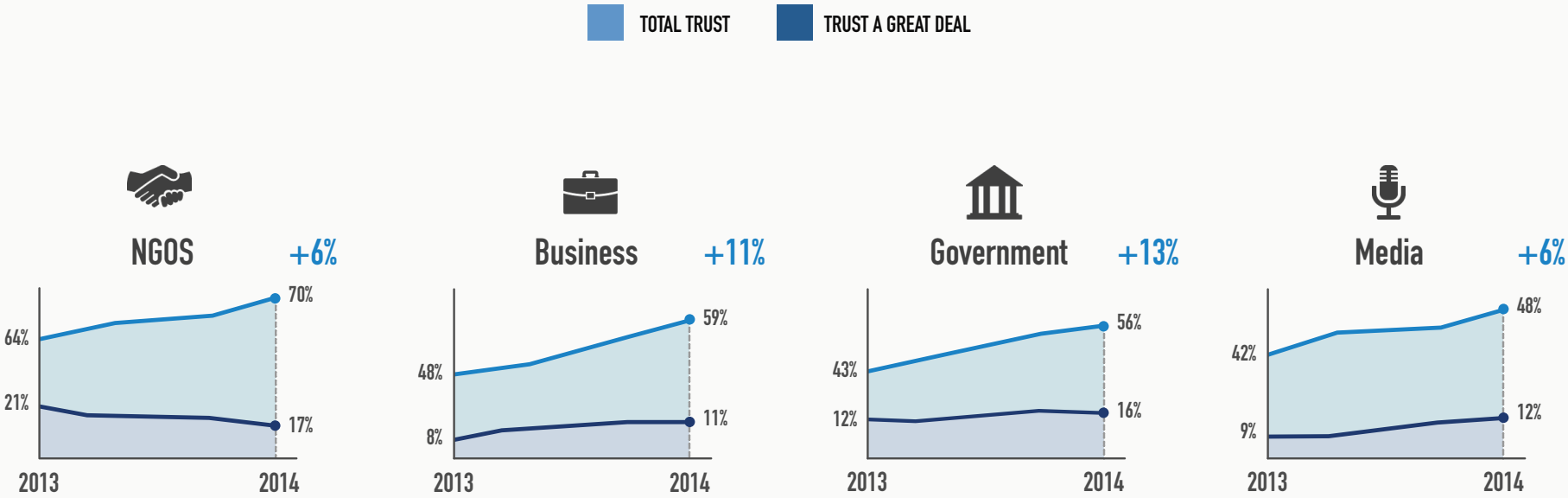
There are 1,000 respondents surveyed per country including Australia. The 20 minute online interviews are conducted with general population aged 18 and over.

EDELMAN TRUST BAROMETER IN RETROSPECT



REVERSAL OF FORTUNE: TRUST INCREASES ACROSS THE BOARD

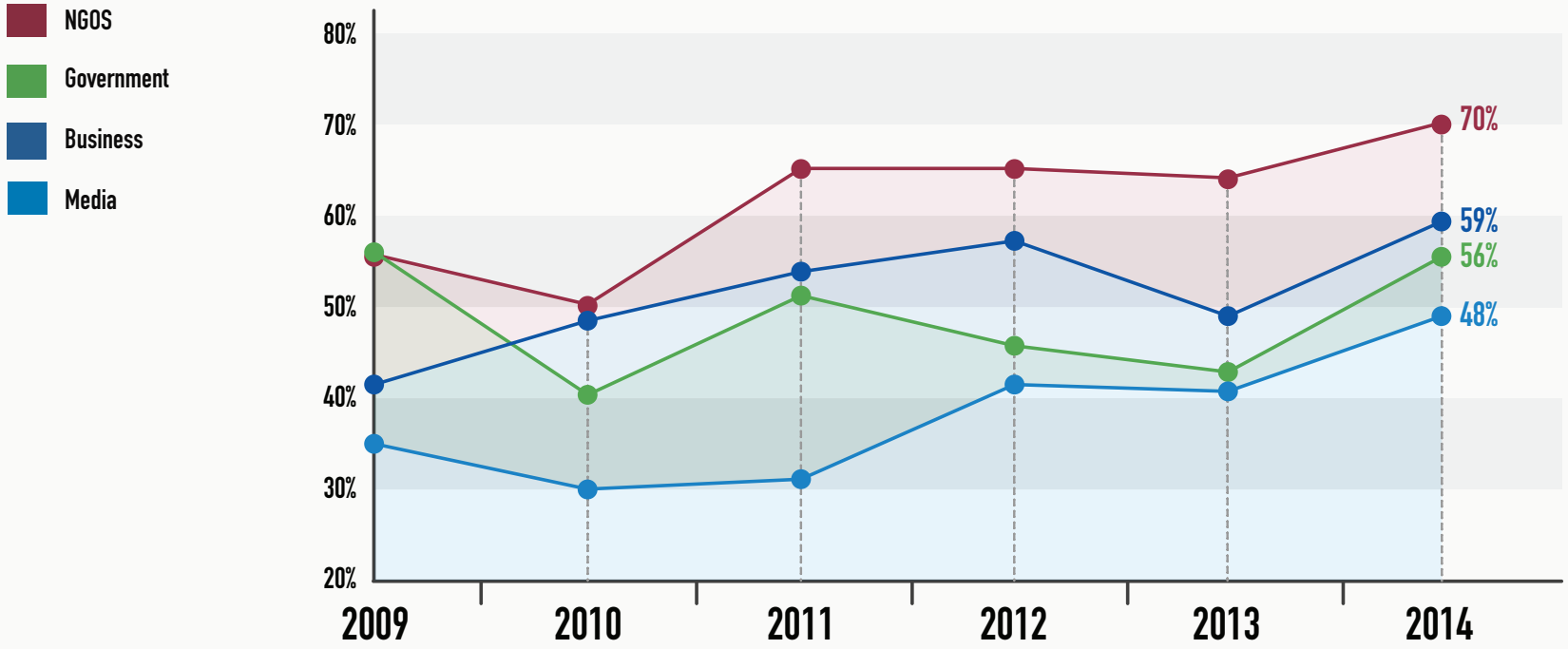
Trust in the four institutions



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.

TRUST IN EVERY INSTITUTION AT ITS HIGHEST POINT SINCE 2009

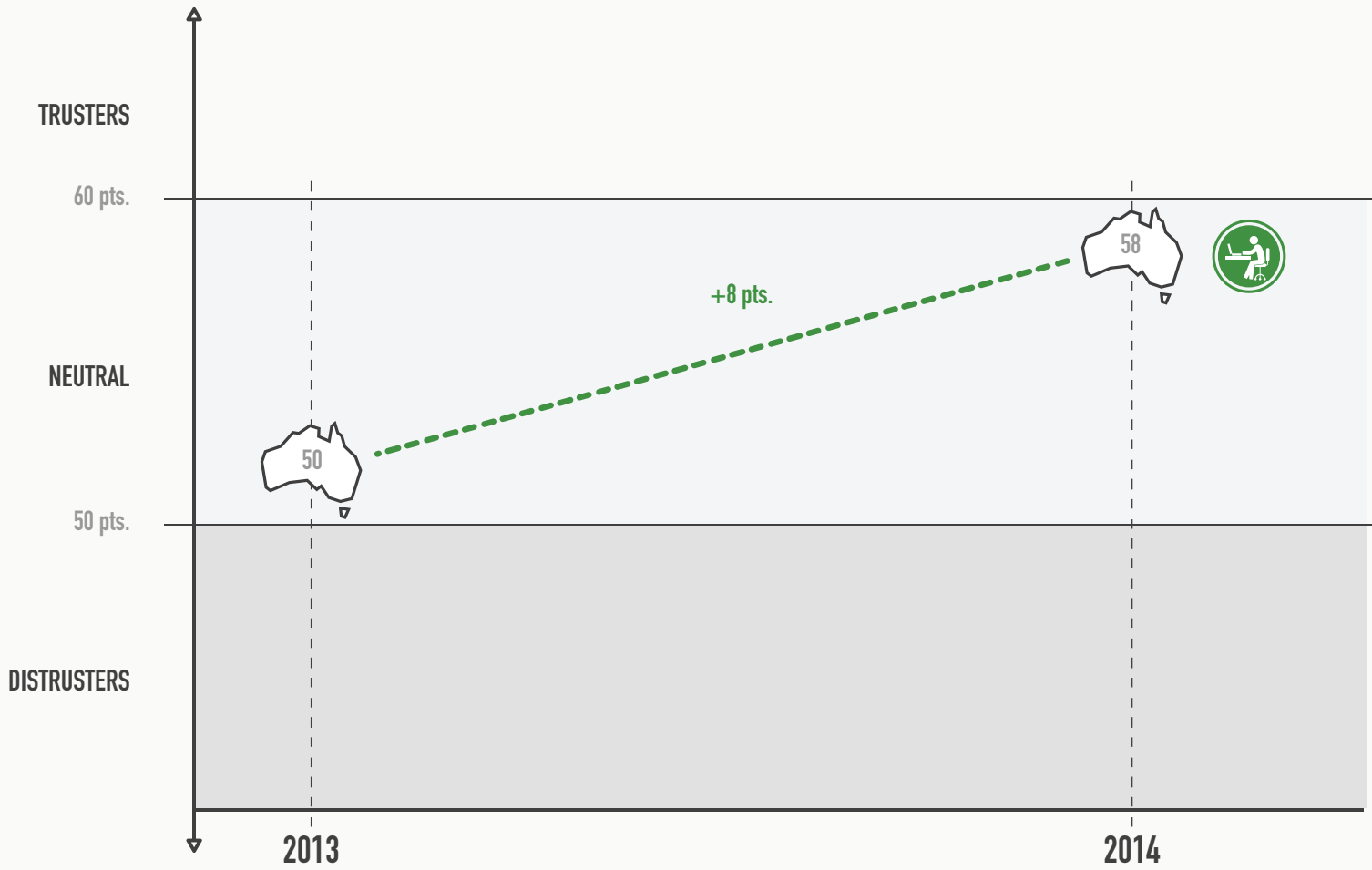
Australia trust in the four institutions since 2009



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.

AUSTRALIA IS ONE OF THE FEW COUNTRIES

to see a significant lift in trust



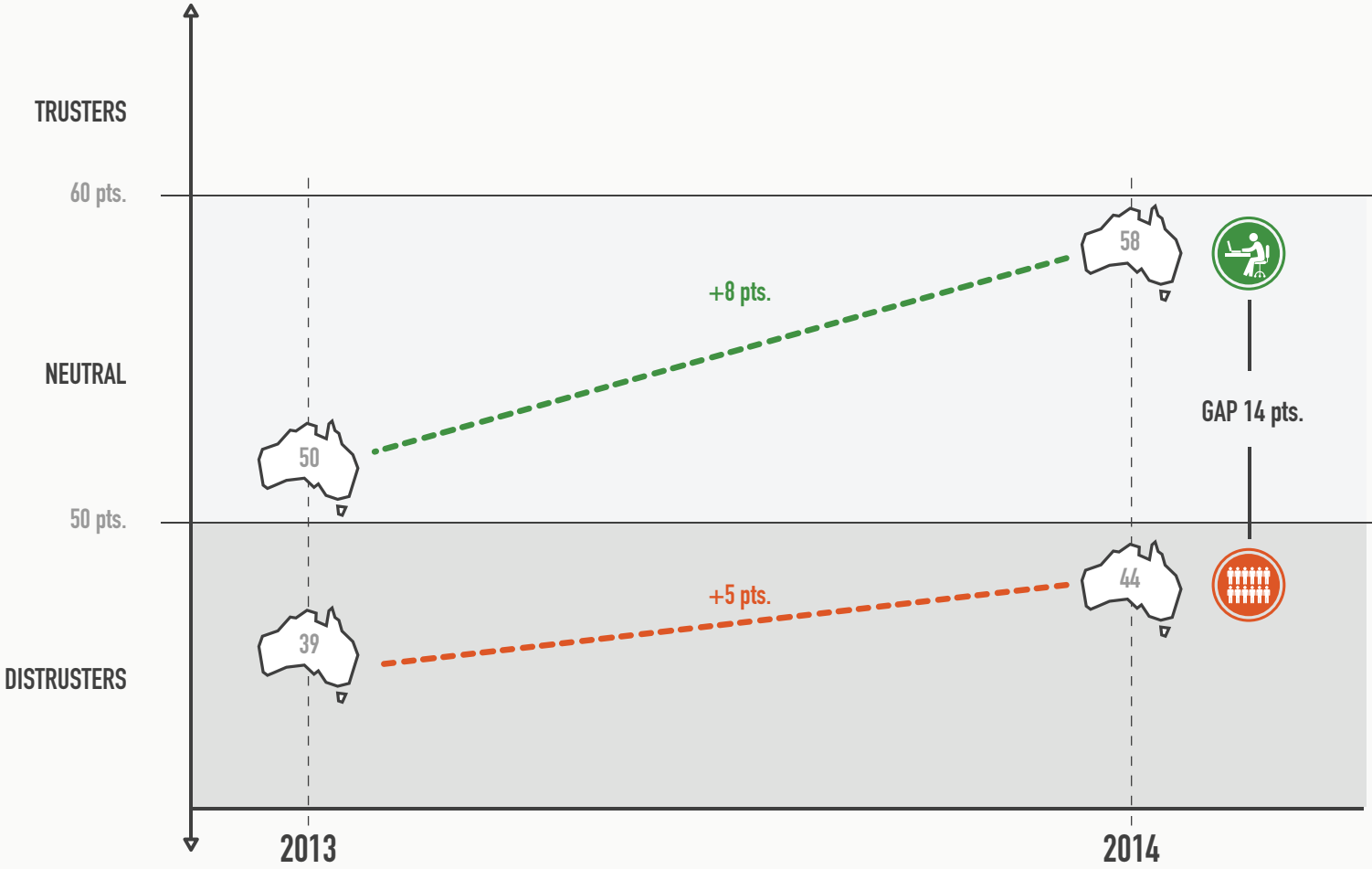
UAE	79 pts.
CHINA	79 pts.
SINGAPORE	73 pts.
INDONESIA	72 pts.
INDIA	69 pts.
MALAYSIA	65 pts.
CANADA	60 pts.
NETHERLANDS	60 pts.
MEXICO	59 pts.
HONG KONG	59 pts.
AUSTRALIA	58 pts.
BRAZIL	57 pts.
GERMANY	57 pts.
ARGENTINA	53 pts.
U.K.	52 pts.
SWEDEN	51 pts.
S. KOREA	51 pts.
S. AFRICA	50 pts.
U.S.	49 pts.
FRANCE	46 pts.
JAPAN	44 pts.
ITALY	43 pts.
TURKEY	41 pts.
SPAIN	39 pts.
IRELAND	39 pts.
RUSSIA	37 pts.
POLAND	35 pts.

Edelman #EdelTrust

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). Informed Public

Edelman trustbarometer 2014 | ANNUAL GLOBAL STUDY

BUT ALSO REVEALS A GROWING DIVIDE



UAE	79 pts.
CHINA	79 pts.
SINGAPORE	73 pts.
INDONESIA	72 pts.
INDIA	69 pts.
MALAYSIA	65 pts.
CANADA	60 pts.
NETHERLANDS	60 pts.
MEXICO	59 pts.
HONG KONG	59 pts.
AUSTRALIA	58 pts.
BRAZIL	57 pts.
GERMANY	57 pts.
ARGENTINA	53 pts.
U.K.	52 pts.
SWEDEN	51 pts.
S. KOREA	51 pts.
S. AFRICA	50 pts.
U.S.	49 pts.
FRANCE	46 pts.
JAPAN	44 pts.
ITALY	43 pts.
TURKEY	41 pts.
SPAIN	39 pts.
IRELAND	39 pts.
RUSSIA	37 pts.
POLAND	35 pts.

Edelman #EdelTrust

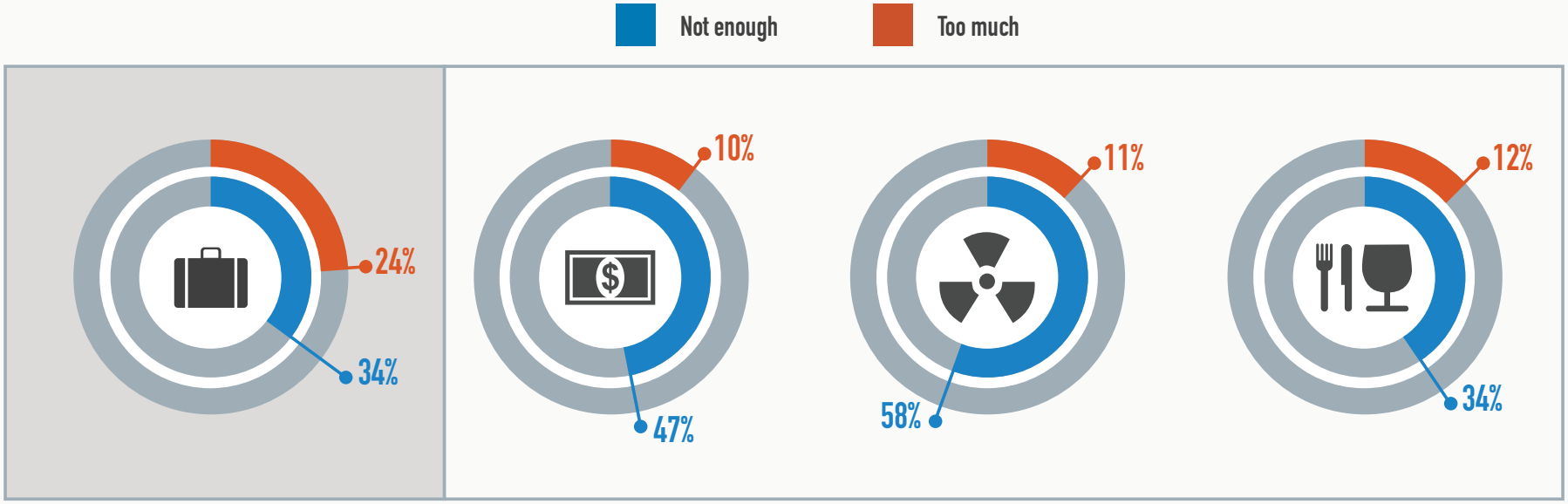
Trust Index is an average of a country's trust in the four institutions of government, business, media and NGOs.
20-country global total (does not include Argentina, Hong Kong, Malaysia, Singapore, South Africa, Turkey, UAE). Informed Public and General Public.

Edelman trustbarometer 2014 | ANNUAL GLOBAL STUDY

THE BUSINESS GOVERNMENT DYNAMIC

RENEWED OPTIMISM TEMPERED BY DESIRE FOR MORE REGULATION

Government regulation of business and sectors



Government Regulation of Business

Government Regulation of Financial Services Industry

Government Regulation of the Energy Industry

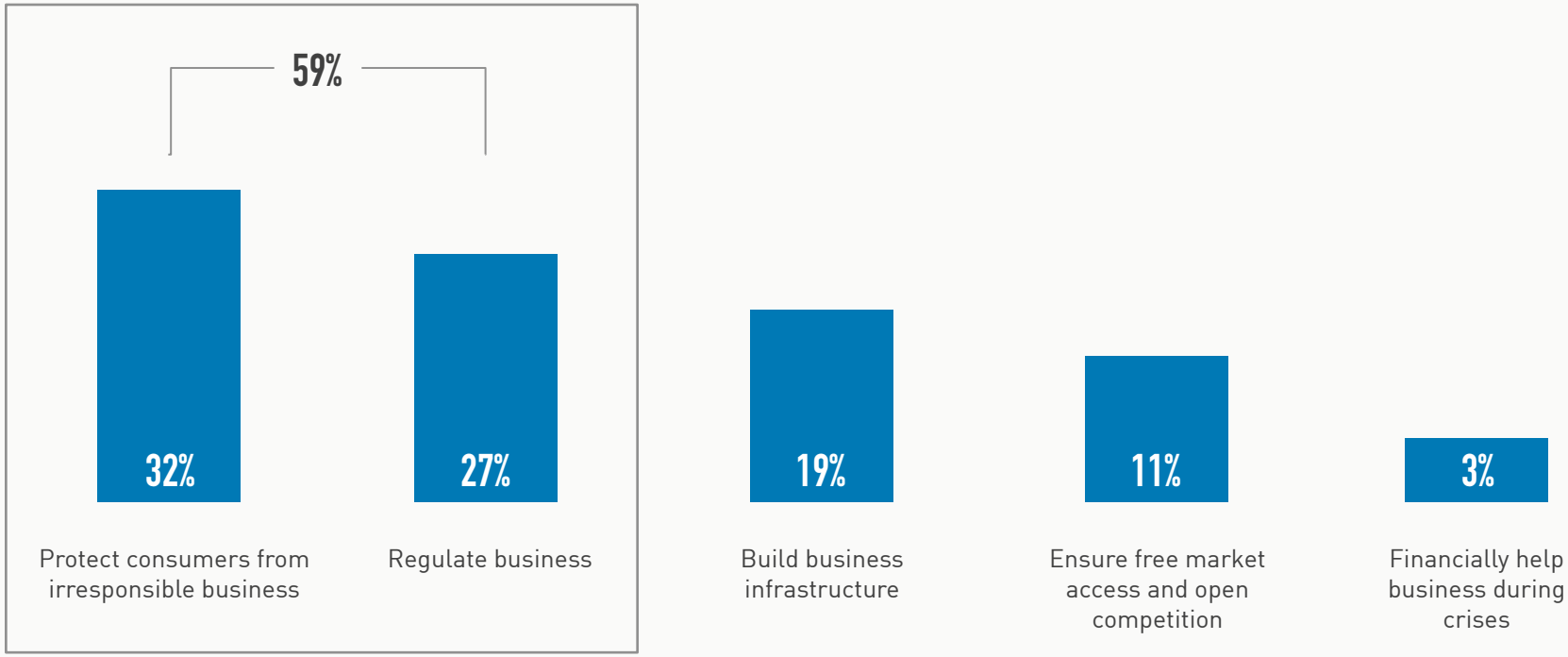
Government Regulation of the Food and Beverage Industry

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.

AUSTRALIANS WANT GOVERNMENT TO PROTECT US

from irresponsible business practice

Most important role for government in business

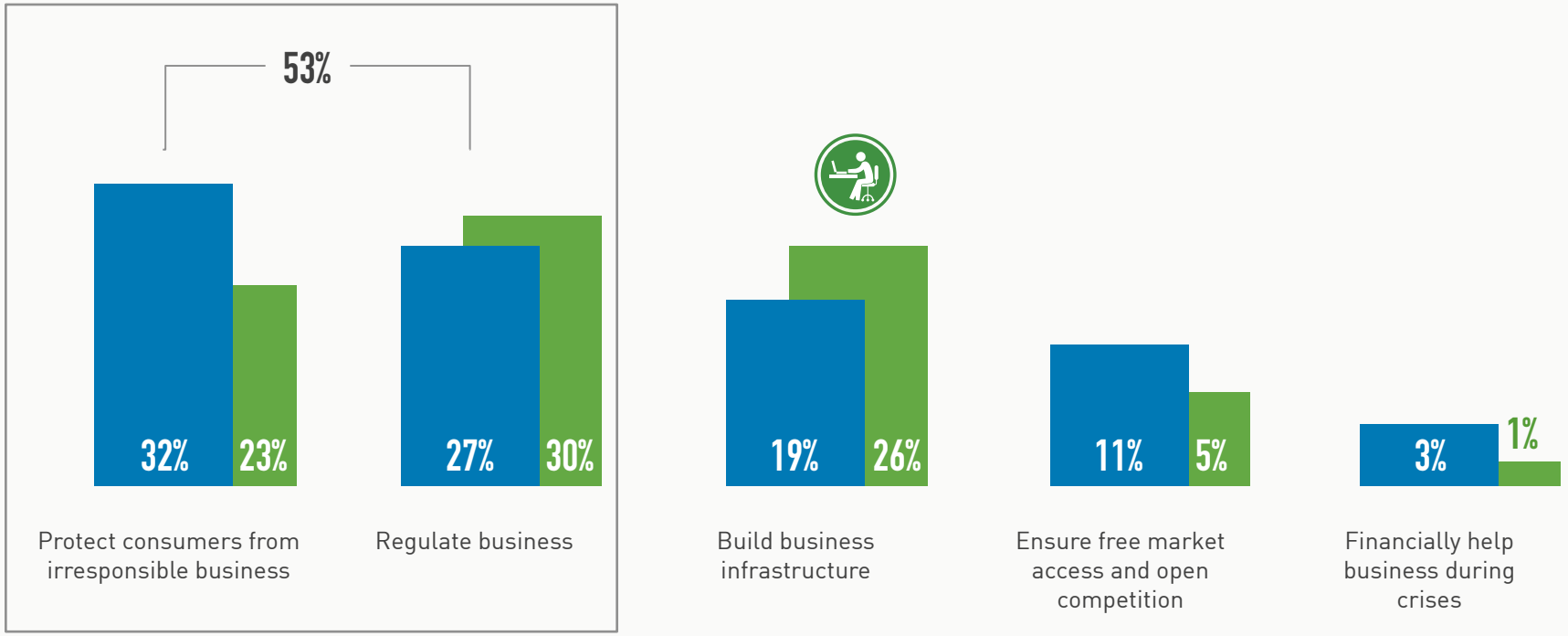


Q149. [TRACKING] Which of the following is the most important role that government should play in business? General Publics, Australia

AUSTRALIANS WANT GOVERNMENT TO PROTECT US

from irresponsible business practice

Most important role for government in business

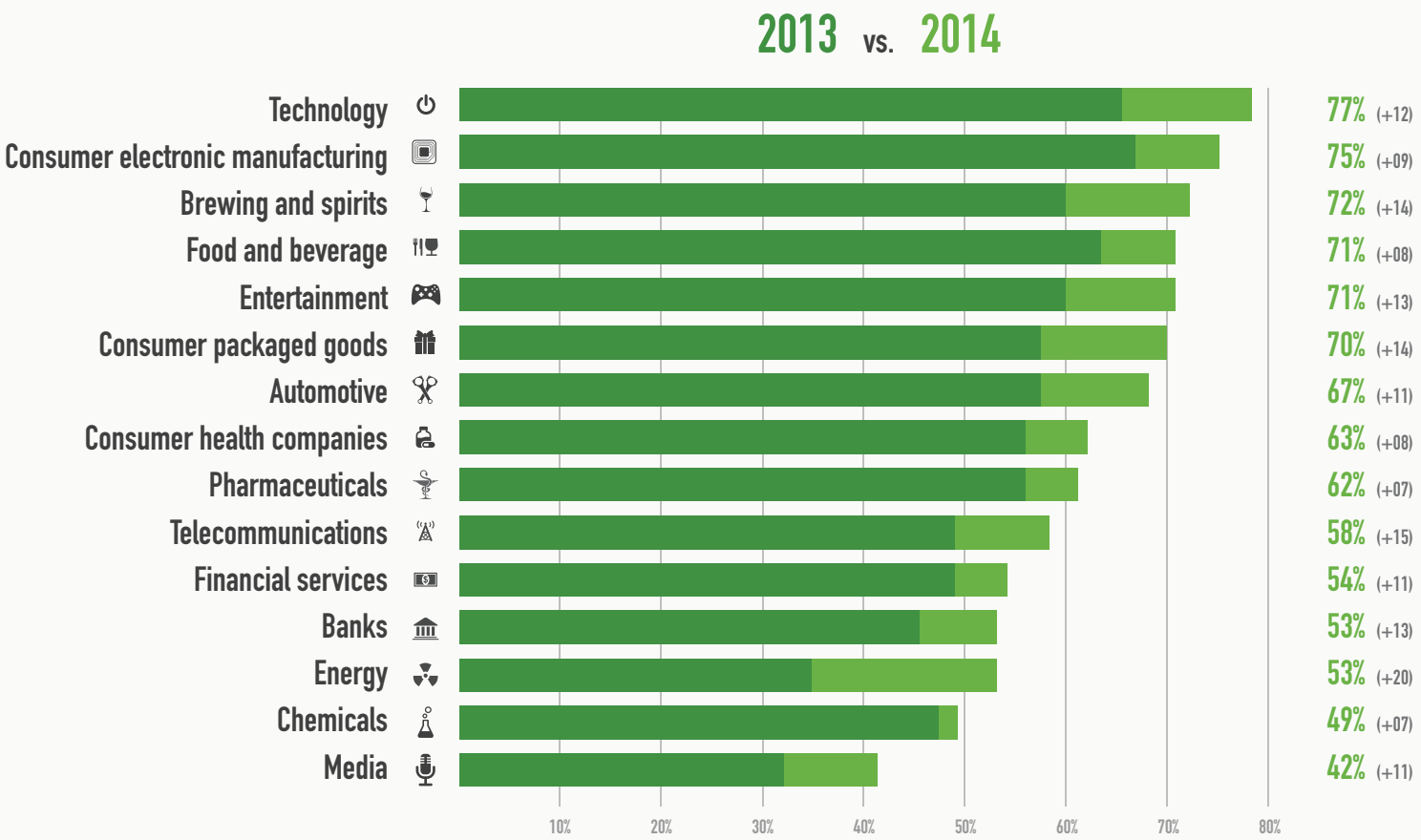


Q149. [TRACKING] Which of the following is the most important role that government should play in business? General Publics, Informed Public, Australia

TRUST IN BUSINESS

ENERGY AND TELCO INDUSTRIES LEAD OVERALL INCREASE IN TRUST

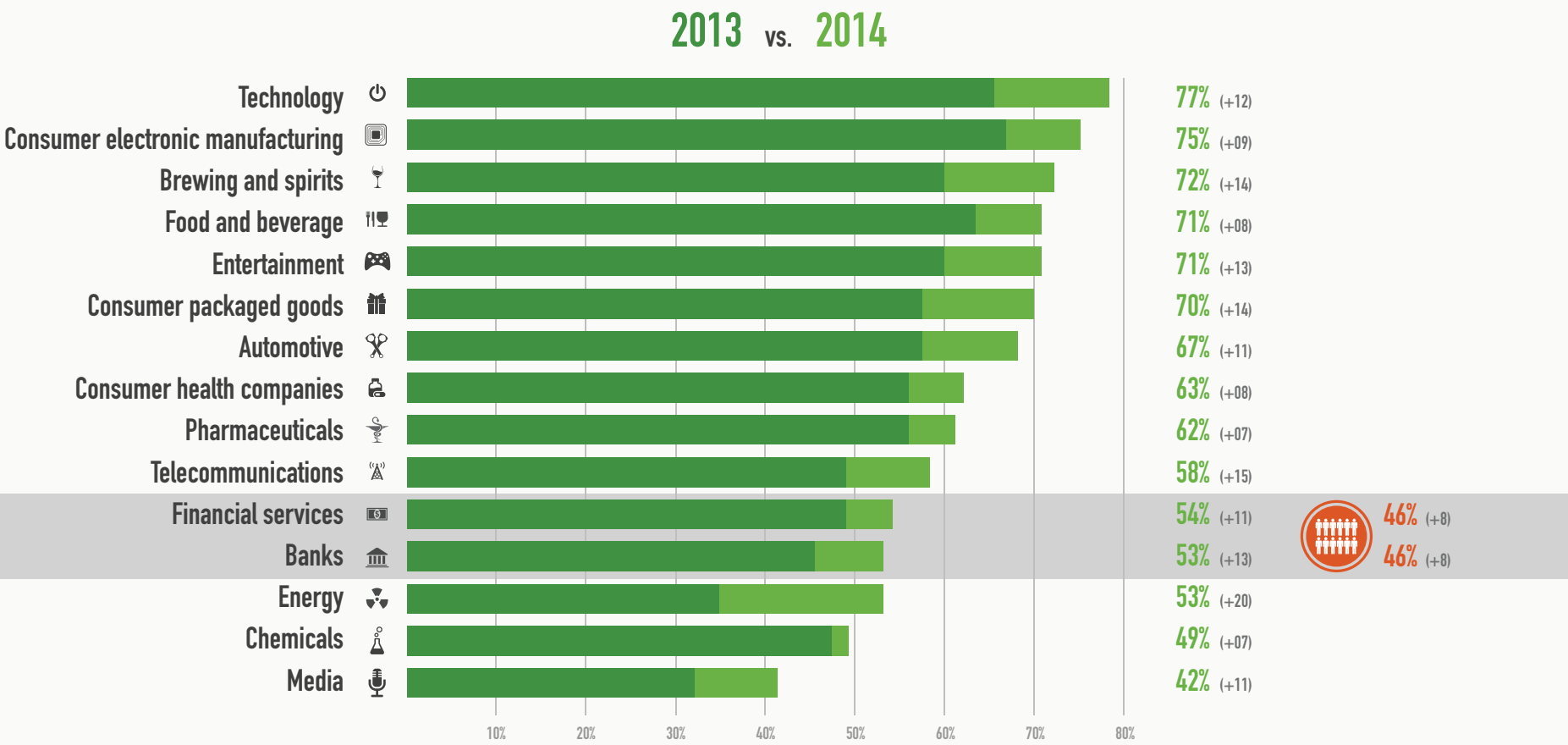
Trust businesses in industries



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.

ENERGY AND TELCO INDUSTRIES LEAD OVERALL INCREASE IN TRUST

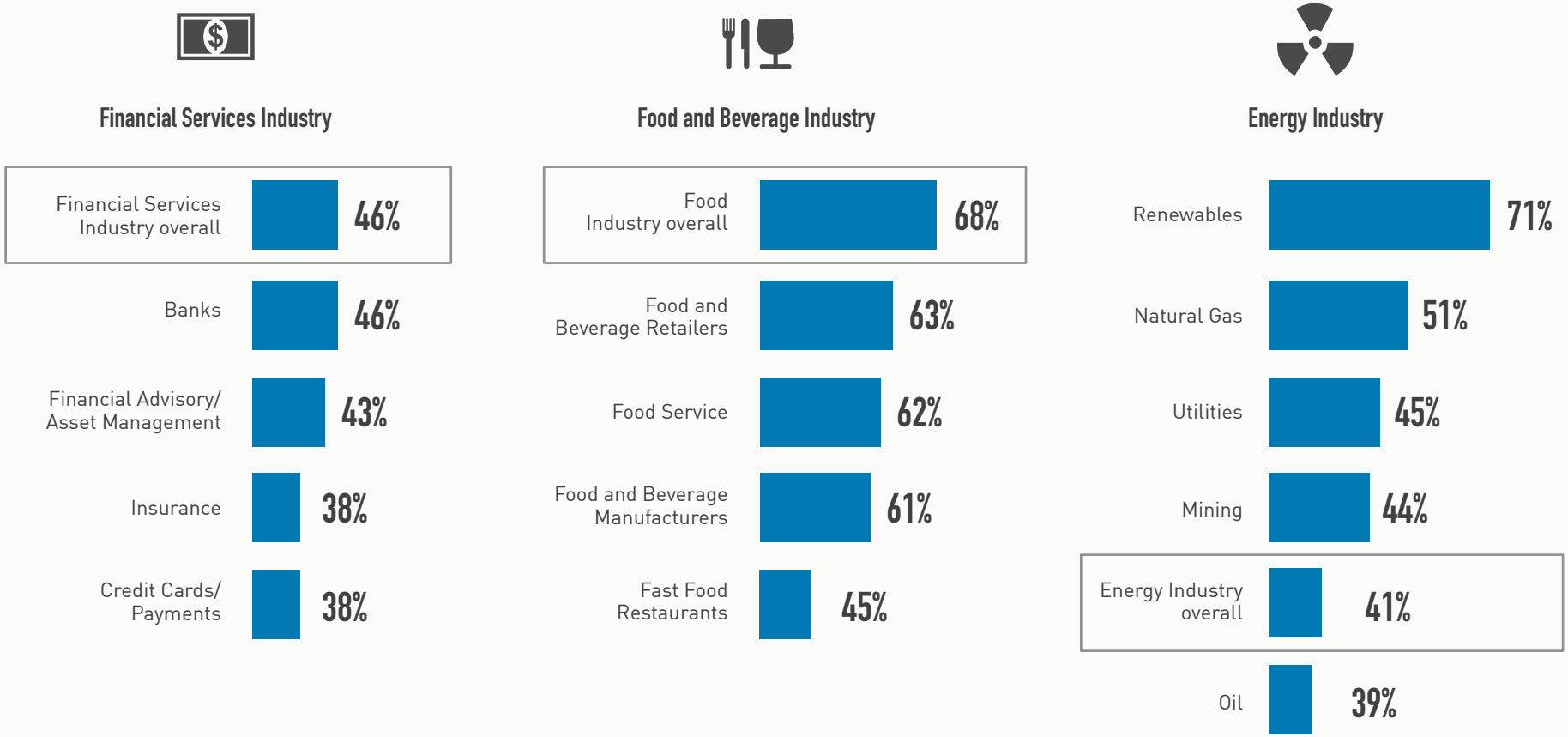
Trust businesses in industries



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.

NUANCE WITHIN EACH INDUSTRY SECTOR

Trust businesses in each industry sector

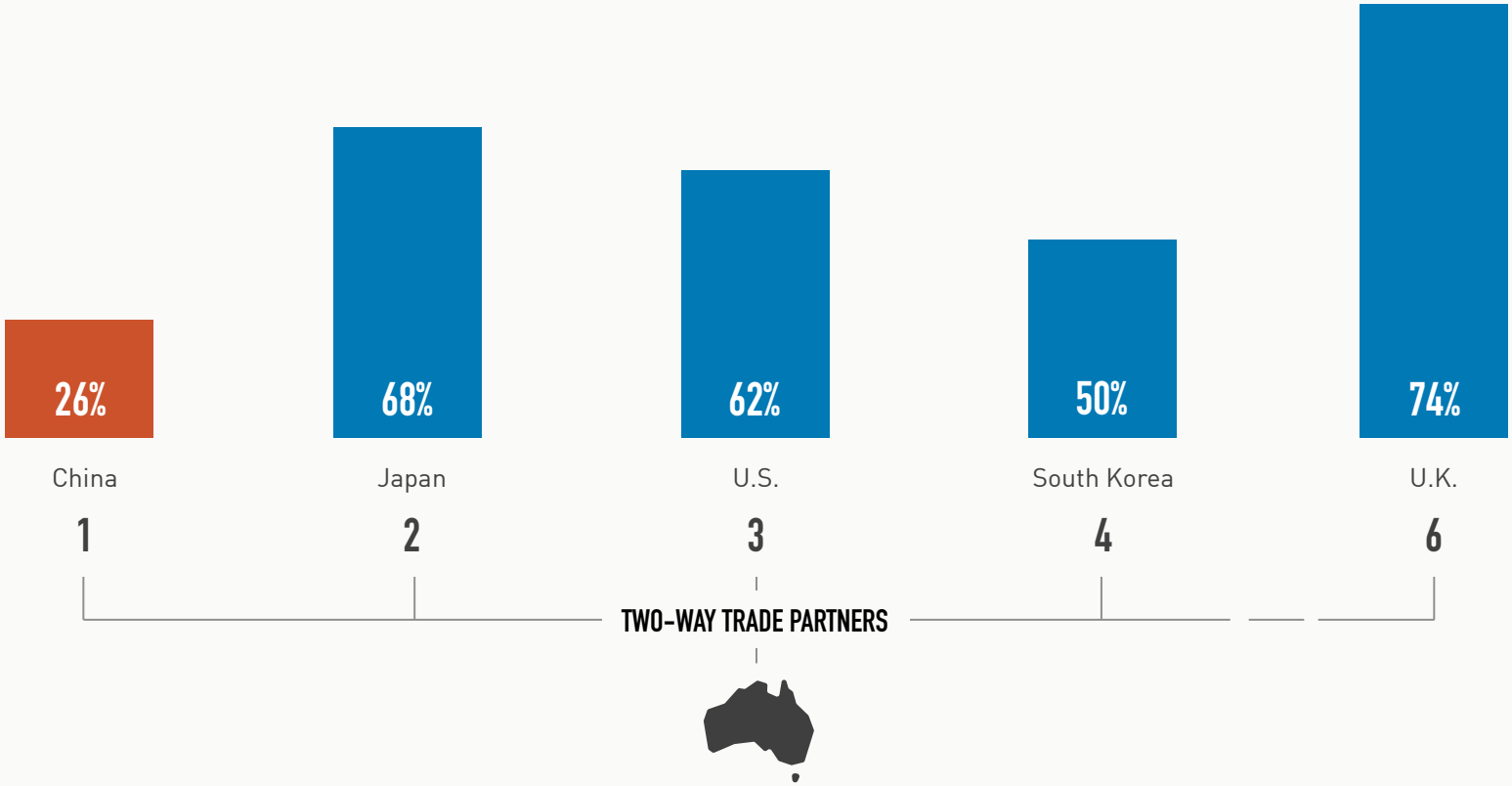


Q61A-64A. [SPLIT SAMPLE] Now thinking about specific sectors within the [TYPE OF INDUSTRY], please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 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". [RANDOMIZE. SELECT ONE RESPONSE] (Top 4 Box, Trust) General Publics.

LOW TRUST IN CHINA

despite being Australia's largest two-way trading partner

Trust in companies headquartered in the following countries

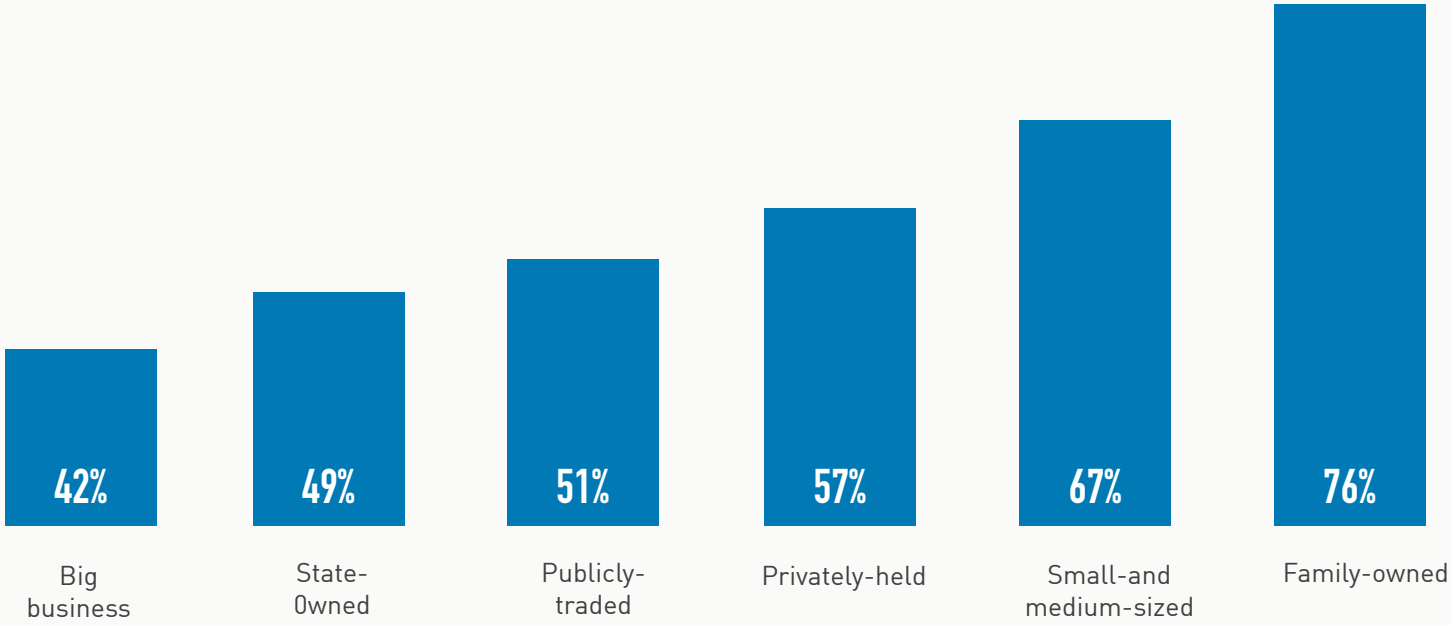


Q26-Q42. [TRACKING] Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". (Top 4 Box, Trust) Informed Publics.
Australia's Top Two Way Trading Partners, DFAT Trade at a Glace 2012 Report based on ABS trade data

FAMILY-OWNED AND SMALL-AND MEDIUM-SIZED BUSINESSES

have a trust advantage as Aussies prove skeptical of big business

Trust in different types of businesses

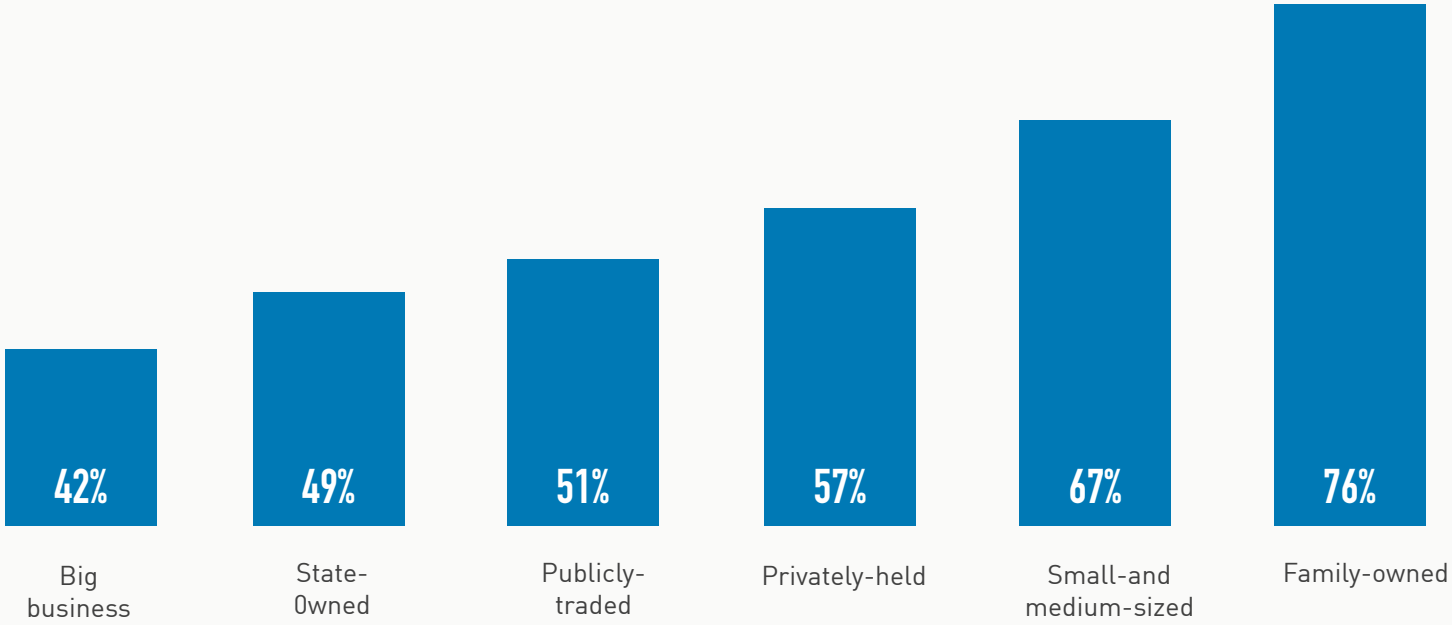


Q15-17C. Thinking about different types of businesses, please indicate how much you trust each type of business to do what is right using a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". (Top 4 Box, Trust) General Publics.

PUBLICLY TRADED COMPANY SEEN AS HAVING MORE POLITICAL INFLUENCE

and being less responsive to customer

Phrases associated with publicly-traded & privately-held businesses



RESPONSIVE TO CUSTOMER NEEDS

Privately-held: 65%

Publicly-traded: 55%

HAVE TOO MUCH POLITICAL INFLUENCE

Privately-held: 41%

Publicly-traded: 57%

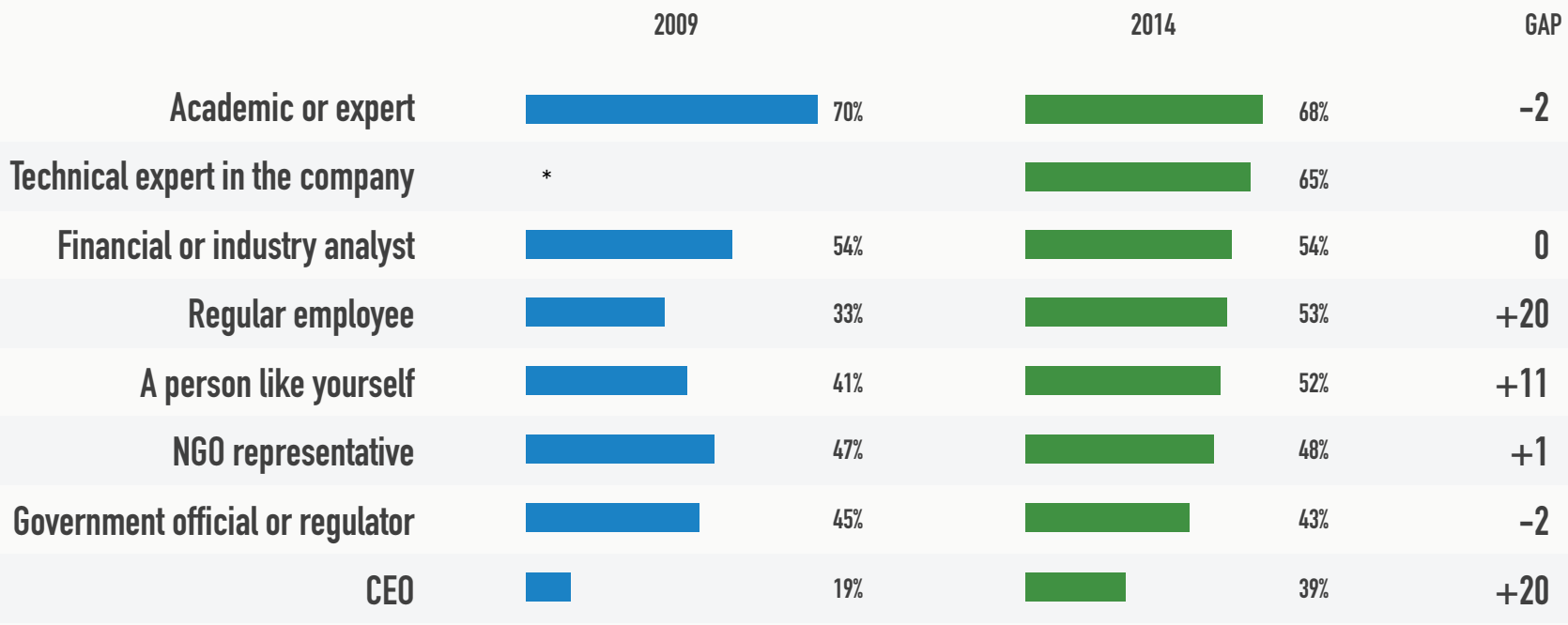
Q296-311. [SPLIT SAMPLE] Based on the information you know about PRIVATELY-HELD BUSINESSES OR COMPANIES, please tell us how much you associate each statement with PRIVATELY-HELD BUSINESSES OR COMPANIES. Please use a 9point scale, where nine means you strongly associate that statement with PRIVATELY-HELD BUSINESSES OR COMPANIES and one means you do not associate that statement at all with PRIVATELY-HELD BUSINESSES OR COMPANIES. (Top 4 Box, Associate) General Publics.

TRUST IN LEADERS

RISE IN CREDIBILITY OF INTERNAL SPOKESPEOPLE

Employees continue to be more credible than CEOs

Credibility of spokespeople



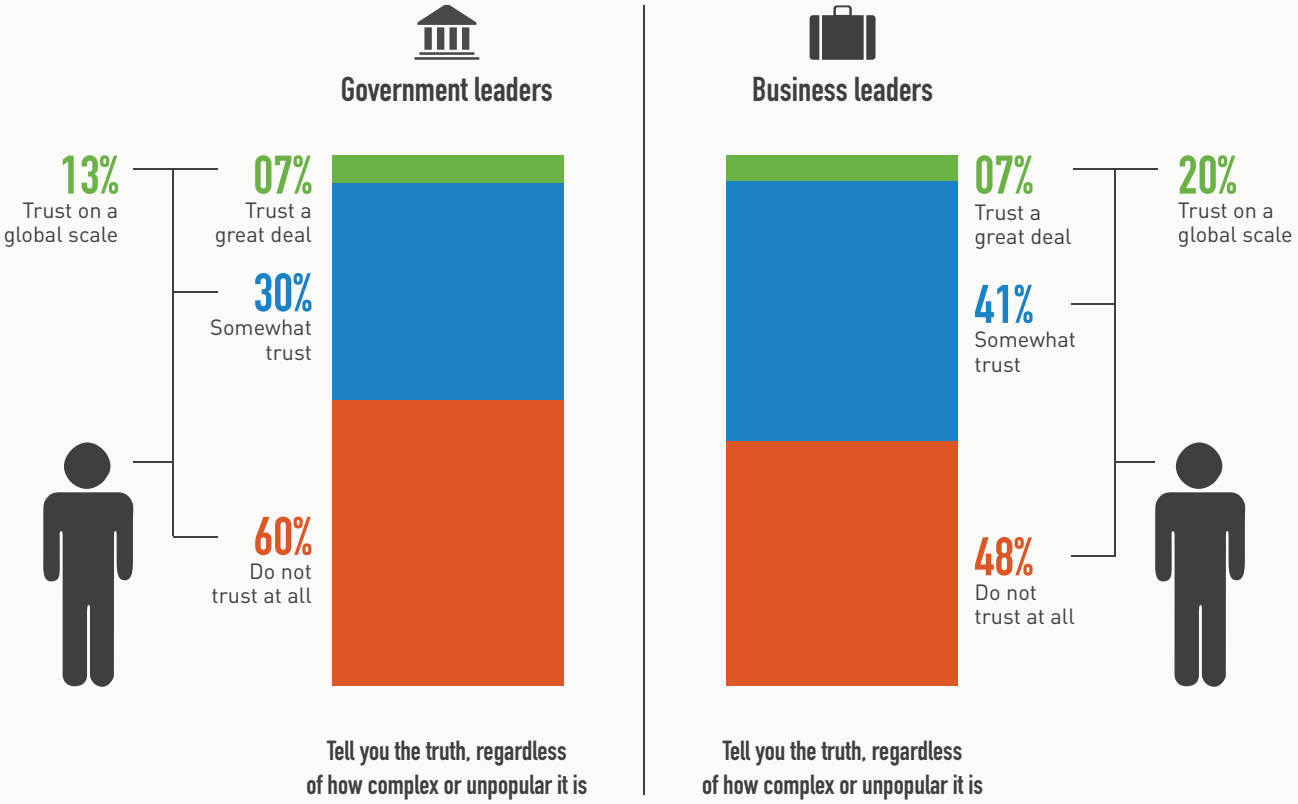
*Not tested in 2009

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.

THERE IS VERY LITTLE TRUST IN BUSINESS OR GOVERNMENT LEADERS

to tell the truth and act with integrity

Australia trust in business and government leaders to do the following

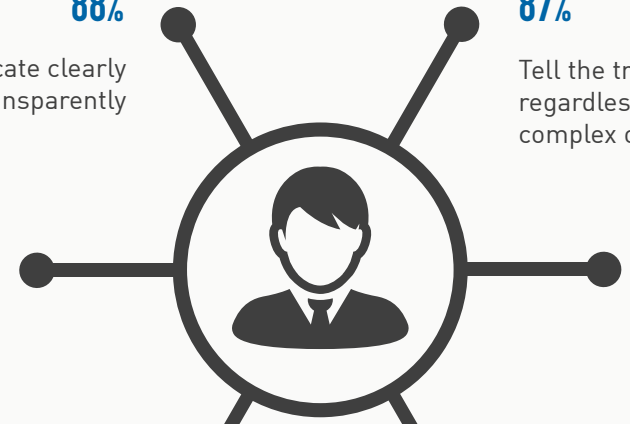


Q144A-147A. [SPLIT SAMPLE] How much do you trust business leaders to do the following?; Q144B-147B. [SPLIT SAMPLE] How much do you trust government leaders to do the following? (Top Box, Trust a great deal) General Publics.

BUILDING TRUST

ACTIONS CEOS CAN TAKE TO BUILD TRUST

Actions a CEO can take to build trust in themselves and their company



88% Communicate clearly and transparently

87% Tell the truth, regardless of how complex or unpopular it is

84% Engages with employees regularly to discuss the state of the business

83% Is front and center during challenging times (products recall, lawsuits, etc...)

56% Has an active media presence

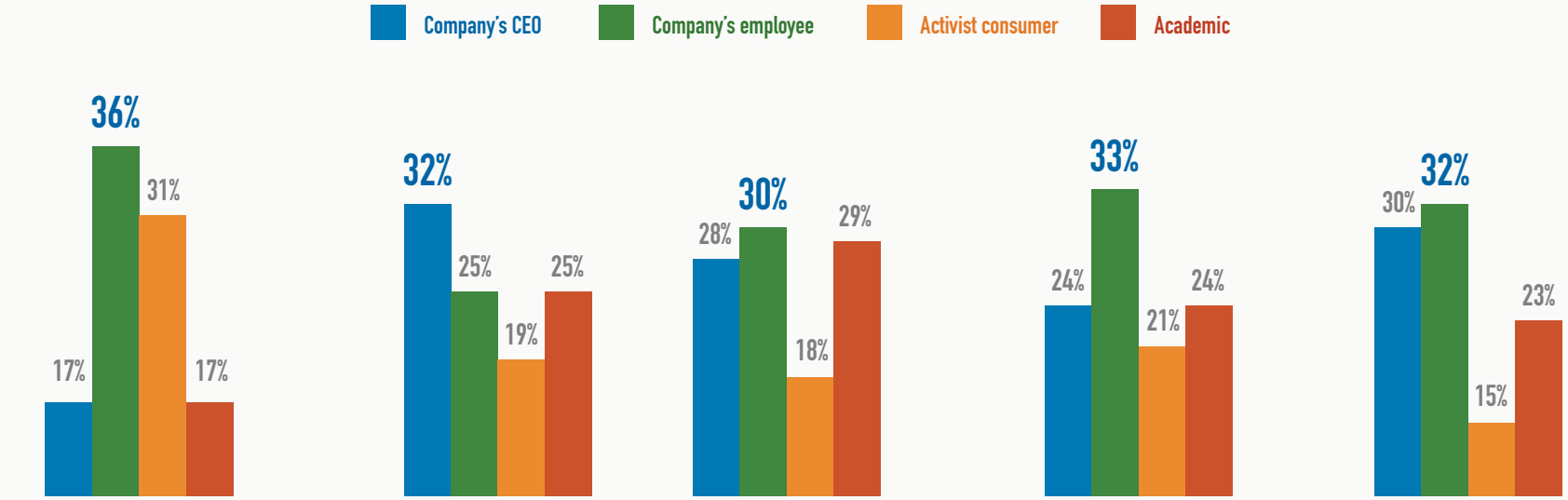
72% Is personally involved in supporting local charities and good causes

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) General Population.

IT TAKES A CHORUS LEAD BY YOUR EMPLOYEES

seen as most credible for customer service, business practices

Most trusted to provide credible and honest information



Customer service
How a company serves its customers and prioritises customer needs ahead of company profits.

Crisis
A company situation in a time of crisis

Innovation
A Company's innovation efforts and new product development.

Business practices
A company's business practices, both positive & negative

Leadership
Accomplishments and information about a company's senior leadership.

Edelman #EdelTrust

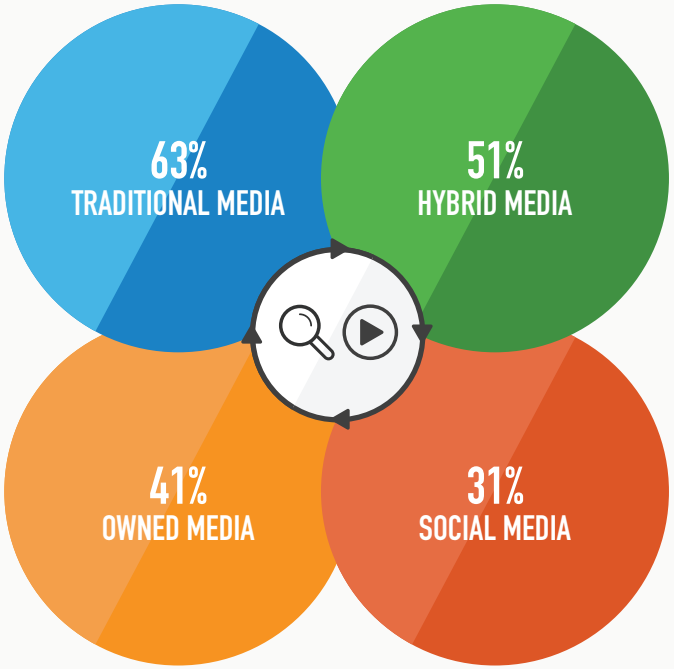
Q197-201. We would now like you to think about different types of information you may read, see or hear about a company. For each topic, please select which person you trust MOST to provide you with credible and honest information about a company. General Publics.

Edelman trustbarometer 2014 | ANNUAL GLOBAL STUDY

A DIVERSIFIED CHANNEL ENGAGEMENT STRATEGY

is reinforced by the levels of trust across the different media sources

Trust in different sources of information



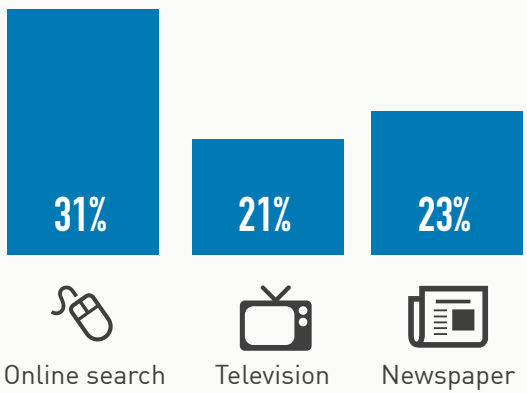
Q178-182. [TRACKING] When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal". (Top 4 Box, Trust) Informed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

MAKE IT FINDABLE: THE POWER OF SEARCH

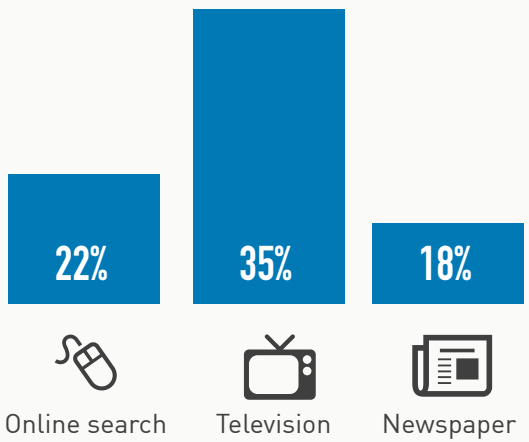
56% **trust** online search

First sources of information

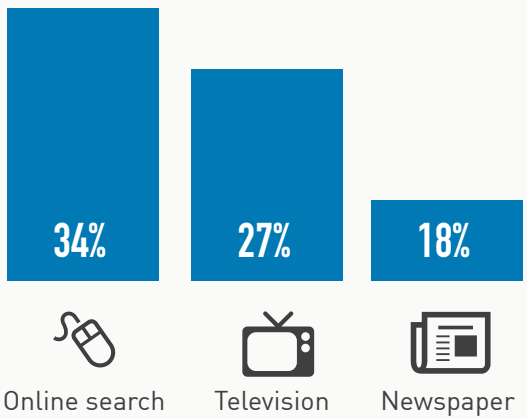
First source to turn to for
GENERAL BUSINESS
information



First source to turn to for
BREAKING NEWS
about business



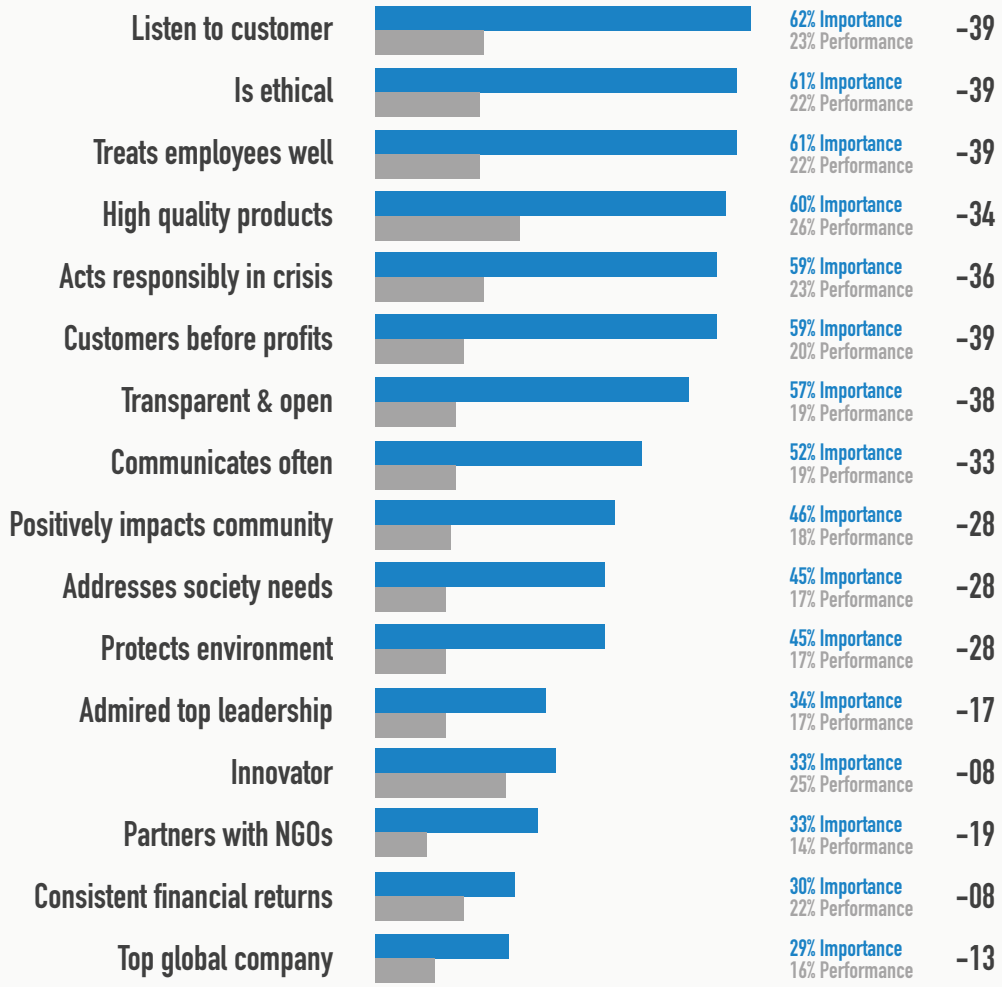
First source to turn to for
CONFIRM/VALIDE
breaking news about business



Q183. On a typical day, what is the first source that you go to for general information about business? ; Q184. What is the first source you go to for breaking news about business? ; Q185. Which of the following sources do you turn to MOST often to confirm/ validate information on breaking news about business? 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) General Population

BUSINESS HAS A LONG WAY TO GO TO MEET AUSTRALIAN EXPECTATION

Business importance vs. business performance on 16 trust drivers



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) General Publics.

Edelman trustbarometer

2014 | ANNUAL GLOBAL STUDY

Australia | #EdelTrust

www.edelman.com.au\trust