



# 2018 Edelman Trust Barometer

Healthcare: Global

# 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

28-market global data margin of error: General population +/- 0.6% (N=32,200), informed public +/- 1.2% (N=6,200), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8 (N=16,100).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N = min 200, varies by market, China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N =min 740, varies by market).

### 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

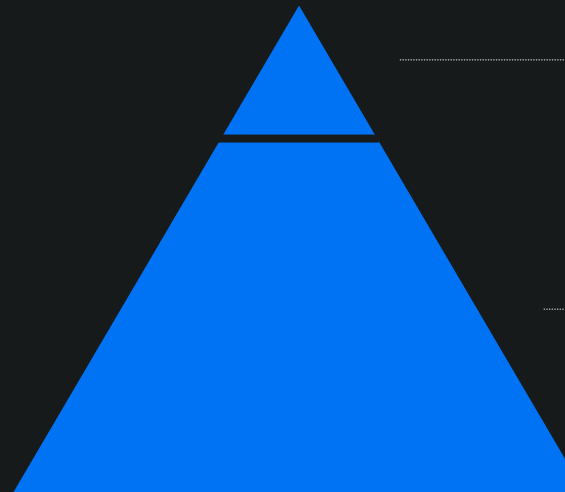
In top 25% of household income per  
age group in each market

Report significant media consumption  
and engagement in business news

### Mass Population

All population not including informed public

Represents 85% of total global population



# Trust in Retrospect

<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from “Authorities” to Peers	“A Person Like Me” Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young Influencers Have More Trust in Business	Business Must Partner with Government to Regain Trust
<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
Trust is Now an Essential Line of Business	Rise of Authority Figures	Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	<b>The Battle for Truth</b>



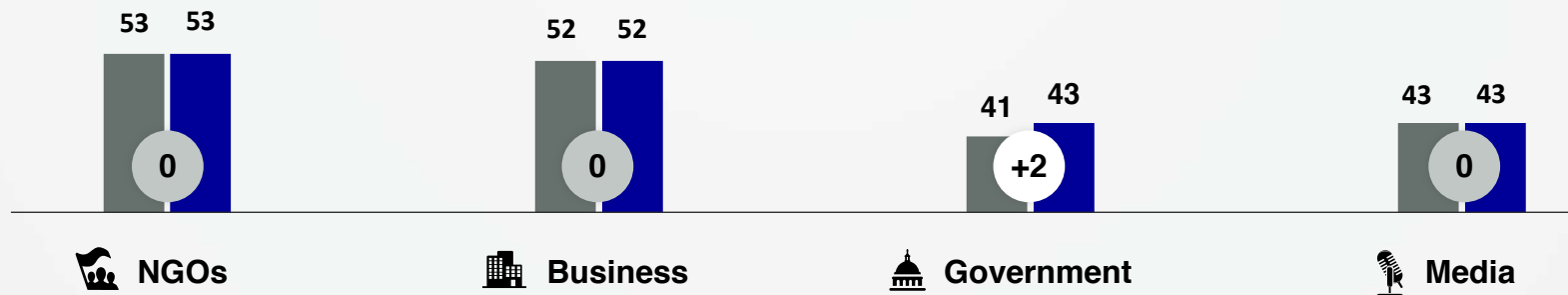
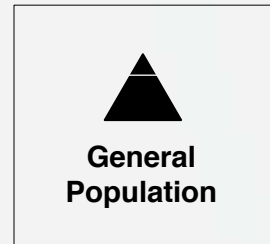
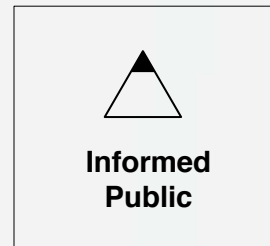


# A Polarization of Trust



# No Recovery in Trust

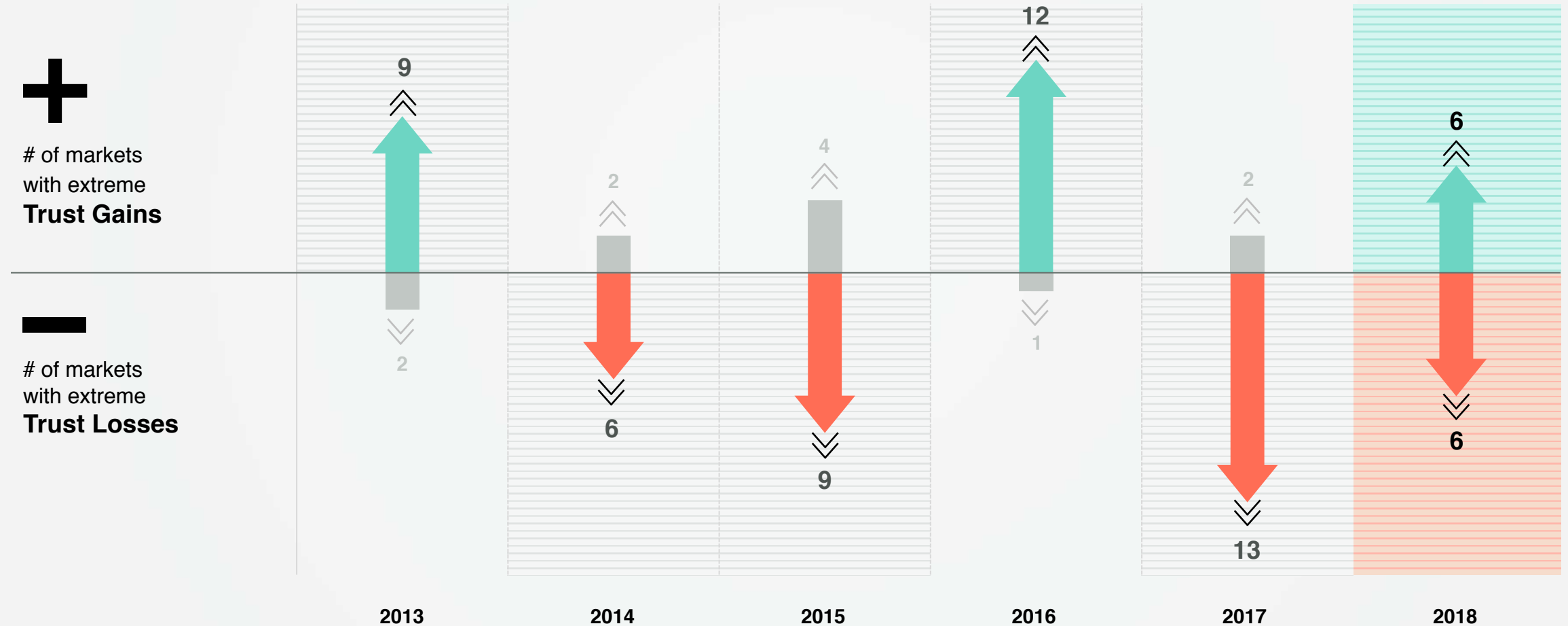
Percent trust in each institution, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_INS. 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) Informed Public and General Population, 28-market global total.

# A World Moving Apart

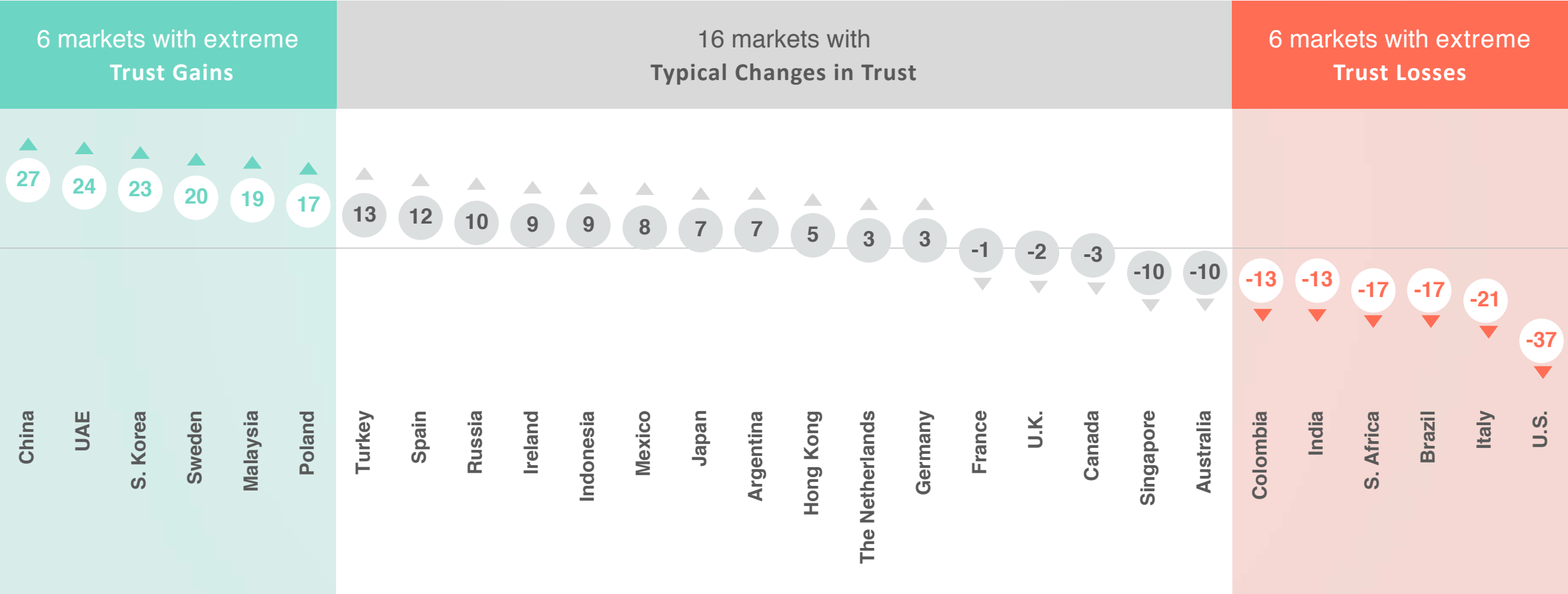
Number of markets with extreme changes in their aggregate trust in the four institutions, 2013 to 2018



Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2013-2018) percentage point change across the four institutions (TRU\_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.

# The Polarization of Trust

Aggregate percentage point change in trust in the four institutions, and change from 2017 to 2018

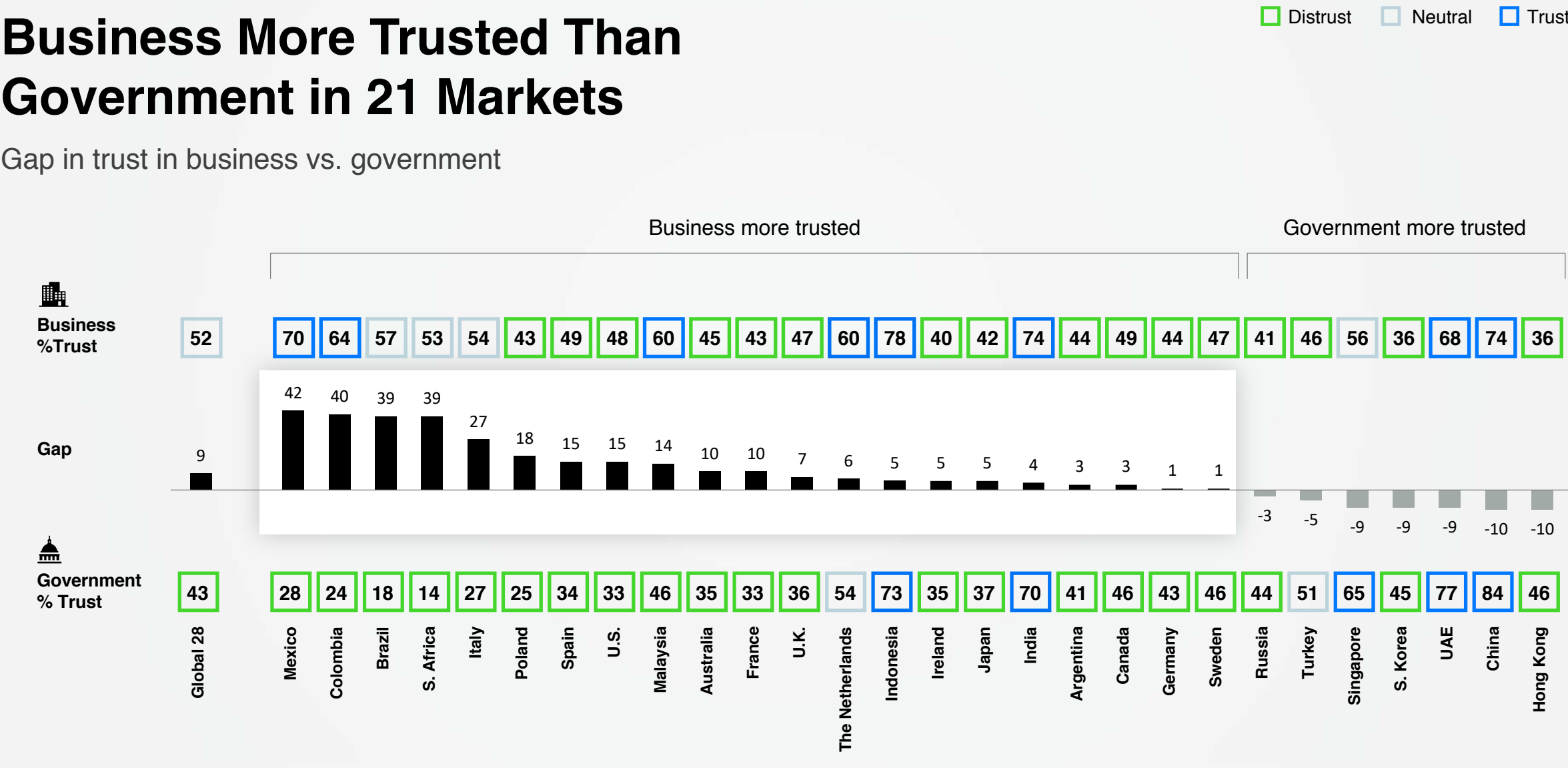


Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2017-2018) percentage point change across the four institutions (TRU\_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.



# Business More Trusted Than Government in 21 Markets

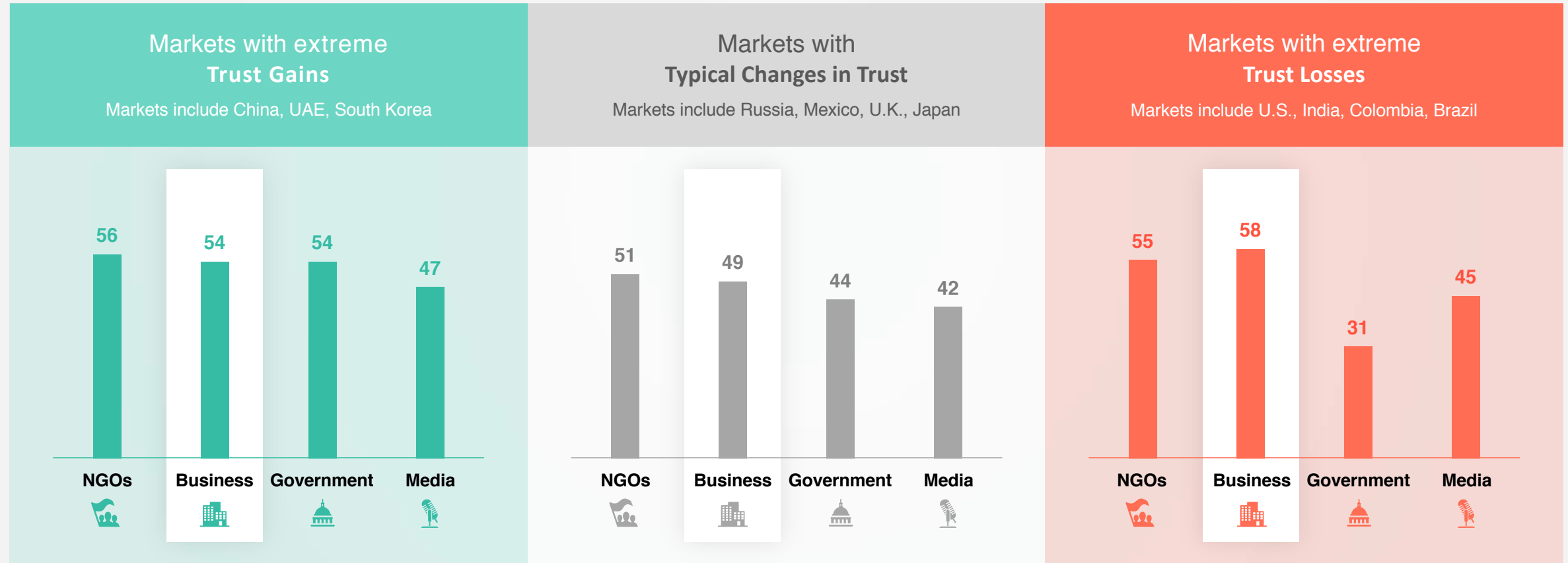
Gap in trust in business vs. government



Source: 2018 Edelman Trust Barometer. TRU\_INS. 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.

# Where Trust Loss is Extreme, Business is the Retaining Wall

Percent trust in the four institutions, in countries with extreme and typical changes in trust



Source: 2018 Edelman Trust Barometer. TRU\_INS. 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). Trust Volatility Measure. The net year-over-year (2017-2018) percentage point change across the four institutions (TRU\_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.

The background of the slide features a dark, grayscale image of several microphones, suggesting a media or news environment. Overlaid on this are several thin, white, wavy lines that create a sense of motion and flow, particularly concentrated around the text area.

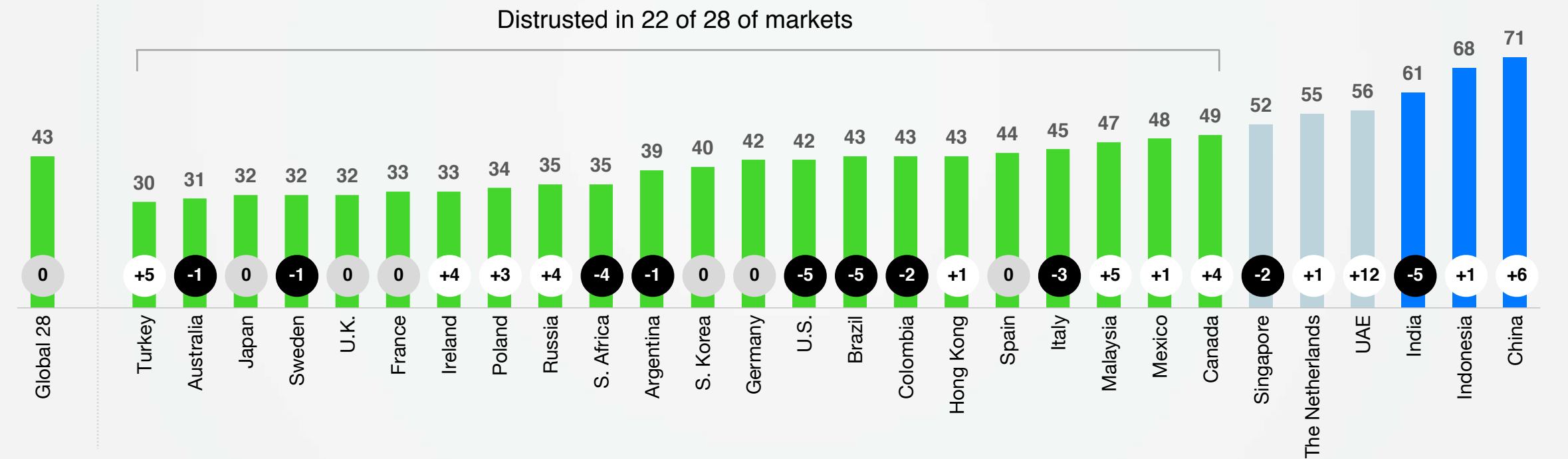
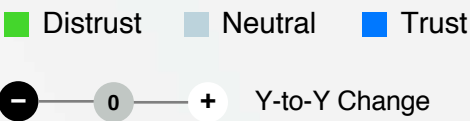
# Trust in the Media

2018 Edelman Trust Barometer



# Media Now Least Trusted Institution

Percent trust in media, and change from 2017 to 2018

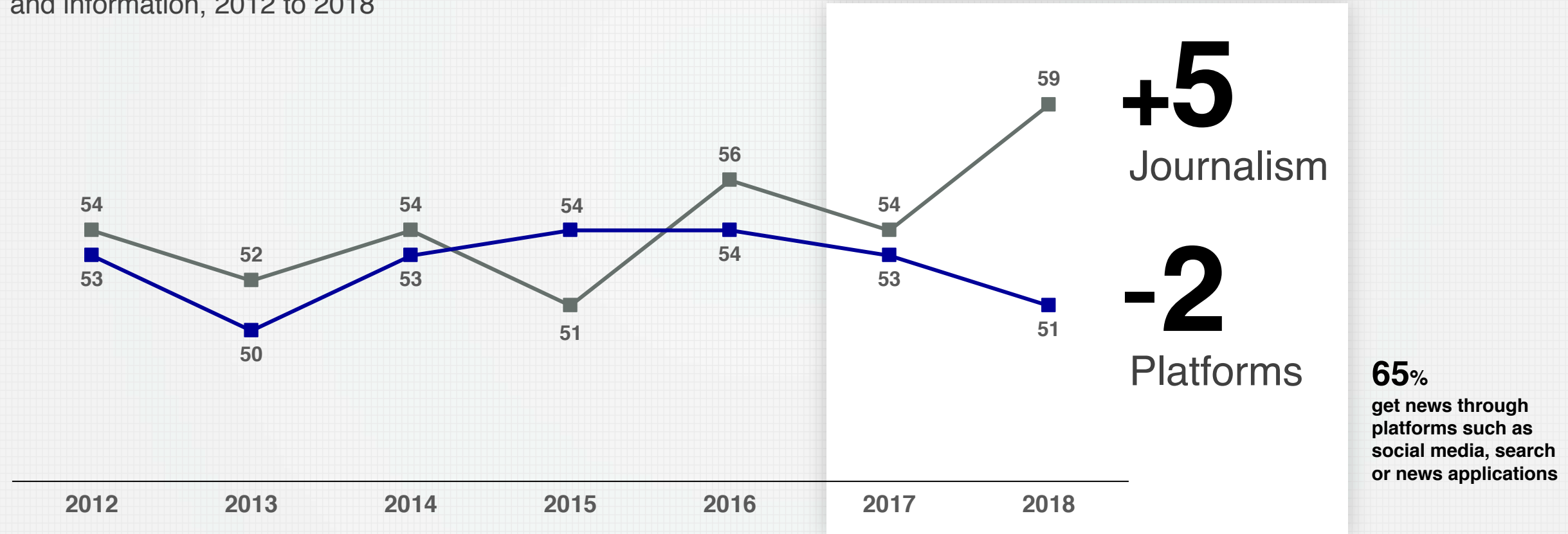


Source: 2018 Edelman Trust Barometer. TRU\_INS. [MEDIA IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General population, 28-market global total.

# While Trust in Platforms Declines, Trust in Journalism Rebounds

Percent trust in each source for general news and information, 2012 to 2018

- Average trust in traditional and online-only media
- Average trust in search engines and social media platforms

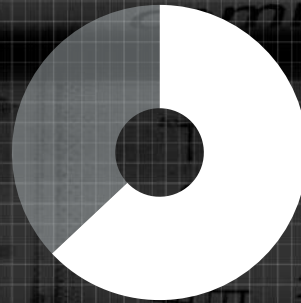


Source: 2018 Edelman Trust Barometer. COM\_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust), question asked of half of the sample. General population, 25-market global total.

Journalism is an average of traditional media and online-only media. Platforms is an average of search engines and social media.

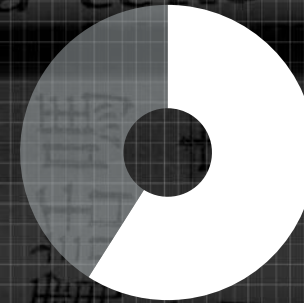
# Uncertainty Over Real vs. Fake News

Percent who agree that ...



**63%**

The average person does not know how to tell good journalism from rumor or falsehoods



**59%**

It is becoming harder to tell if a piece of news was produced by a respected media organization

Source: 2018 Edelman Trust Barometer. ATT\_MED\_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree), question asked of half of the sample. General population, 28-market global total.



# Half Disengaged With the News

## Consumption

How frequently do you consume news produced by major news organizations, either at the original source, shared by others or pushed to you in a feed?

## Amplification

How often do you share or forward news items, or post opinions or other content?

**50%**

### The Disengaged

Consume news  
less than weekly

**25%**

### Consumers

Consume news  
about weekly  
or more

**25%**

### Amplifiers

Consume news about  
weekly or more AND  
share or post content  
several times a month  
or more

Source: 2018 Edelman Trust Barometer. News Engagement Scale, built from MED\_SEG\_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. General population, 28-market global total. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

# Lack of Confidence in Media Undermining Trust and Truth

Percent of respondents who feel they are experiencing these consequences as a result of media not fulfilling its responsibilities

## Loss of Truth

I am not sure what is true and what is not

59%

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## Loss of Trust in Government Leaders

I do not know which politicians to trust

56%

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## Loss of Trust in Business

I don't know which companies or brands to trust

42%

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Source: 2018 Edelman Trust Barometer. MED\_CON. What consequences are you experiencing as a direct result of the media not doing a good job fulfilling its responsibilities? Question asked of those 64% who answered codes 1-3 at MED\_RSP. General population, 28-market global total.



# Trust in Health

2018 Edelman Trust Barometer



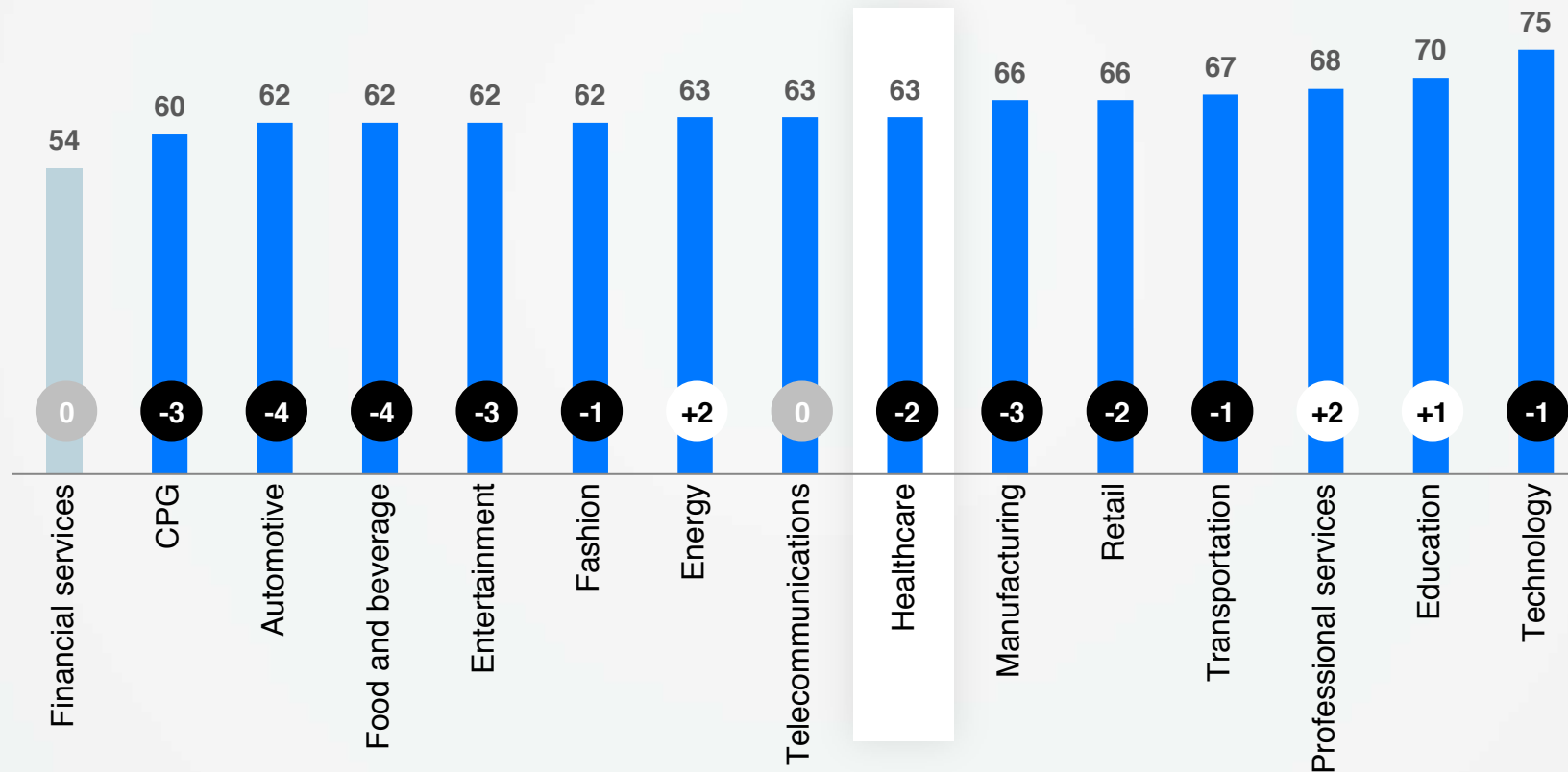
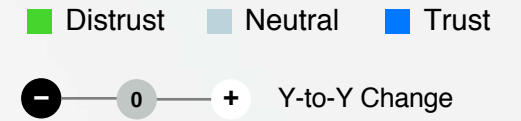
# Health Headlines in 2017

January	February	March	April	May	June
<p>Coalition for Epidemic Preparedness and Innovations, End Malaria Council both launch at Davos</p> <p>A Martin Shkreli website blasts industry execs on drug pricing</p>	<p>NHS admits losing 500,000 confidential medical records</p> <p>Anthem approaches Cigna for potential acquisition</p>	<p>Congressional attempts to replace ACA with AHCA fail in America</p>	<p>Alphabet's Verily unveils new health-focused smartwatch</p> <p>March for Science protest is held in Washington, D.C.</p>	<p>Dr. Tedros Adhanom Ghebreyesus appointed WHO Director-General</p> <p>Merck's Keytruda first drug FDA-approved to treat genetic biomarkers</p>	<p>Global report finds more than 10 percent of the world's population is obese</p> <p>Anthem / Cigna deal falls through</p>
July	August	September	October	November	December
<p>PhRMA launches "Let's Talk About Cost" campaign</p> <p>Measles outbreak across Europe gains traction</p>	<p>Cholera outbreak in Yemen hits 500,000</p> <p>Google unveils online test for depression</p> <p>Merck CEO Ken Frazier resigns from the U.S. President's Manufacturing Council</p>	<p>CAR T-Cell therapy approved for treatment of leukemia</p> <p>Hurricane Maria hits drug production facilities in Puerto Rico</p>	<p>Opioid abuse declared national public health emergency in U.S.</p> <p>CVS and Aetna acquisition talks begin</p>	<p>Speculation about Amazon's possible entry into healthcare</p> <p>AHA announces new hypertension guidelines</p> <p>WHO announces global commitment to end TB</p>	<p>Spark Therapeutic's gene therapy Luxturna approved by FDA to treat vision loss</p> <p>Safety and efficacy of Sanofi's Dengvaxia called into question in the Philippines</p>

*Edelman Trust Barometer survey  
conducted October 28 – November 20, 2017*

# Trust Declines in 10 of 15 Sectors

Percent who trust each sector, and change from 2017 to 2018

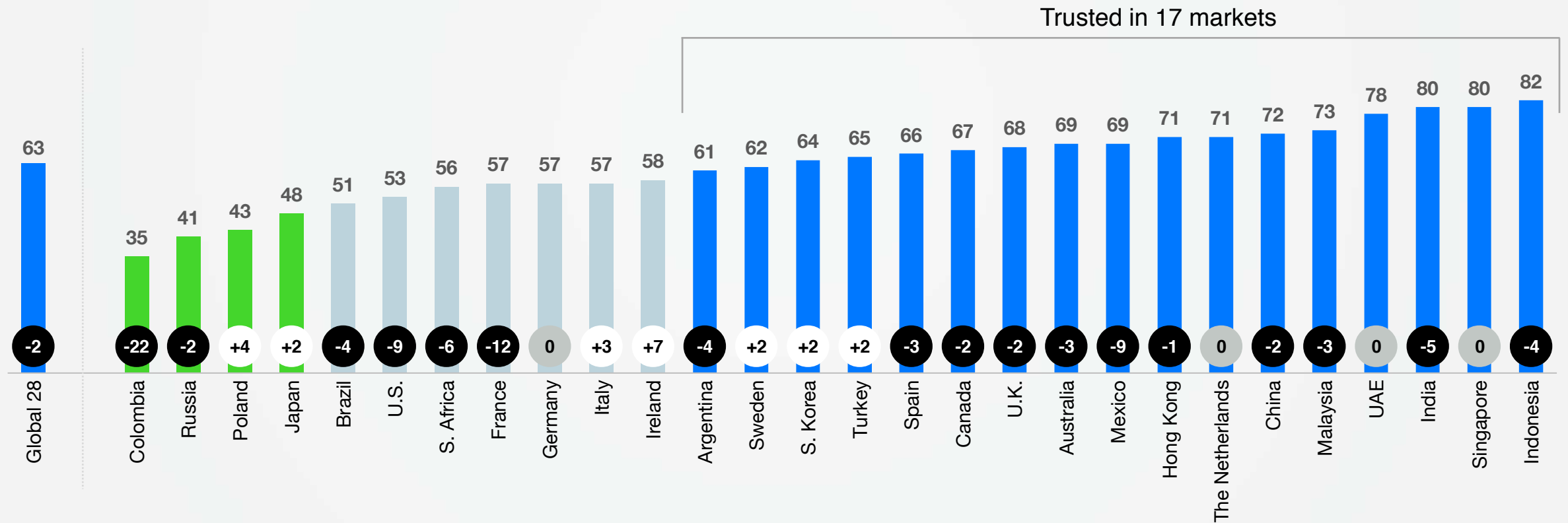
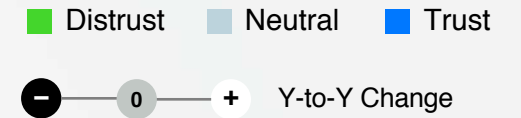


Source: 2018 Edelman Trust Barometer. TRU\_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. (Top 4 Box, Trust), industries shown to half of the sample. General Population, 28-market global total.

# Trust in Health

## Declines in 17 of 28 Markets

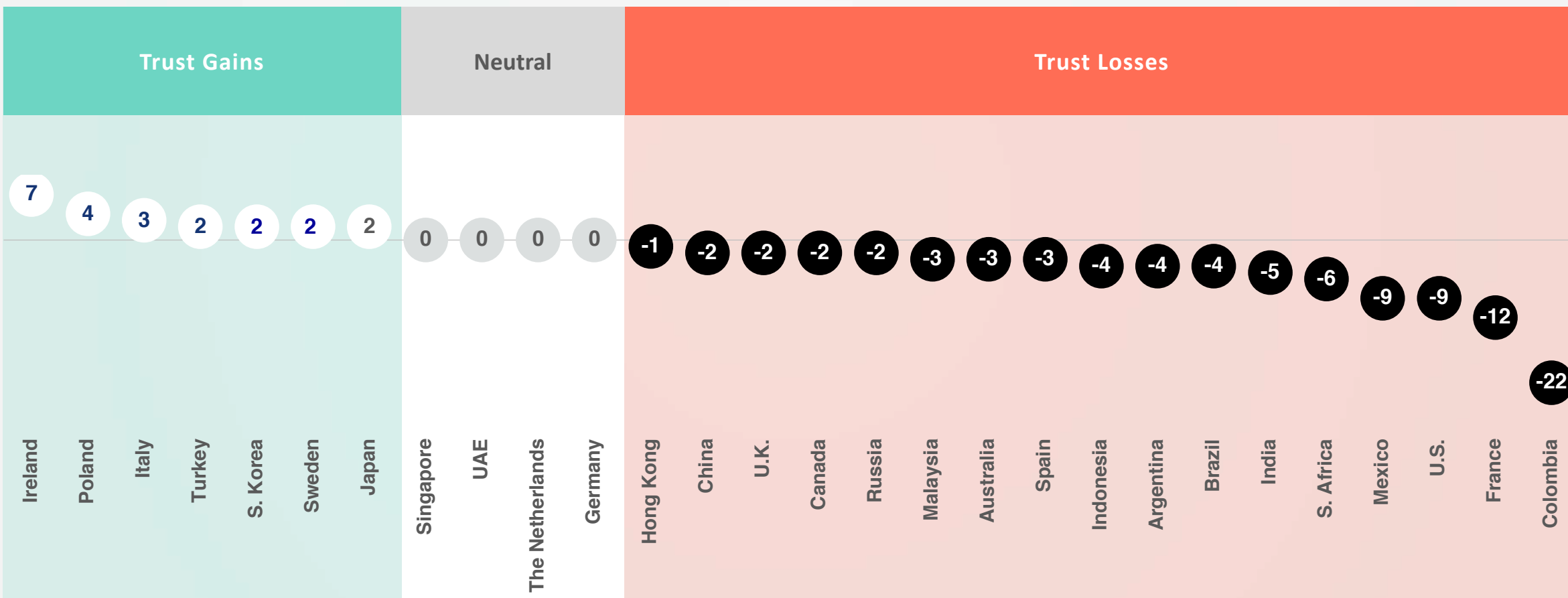
Percent trust in the healthcare sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_IND. 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), industries shown to half of the sample. General population, 28-market global total.

# Trust in Health Declines in 17 of 28 Markets

Percent trust in the healthcare sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_IND. 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), industries shown to half of the sample. General population, 28-market global total.

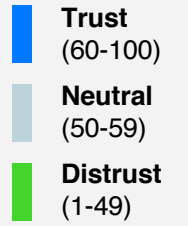
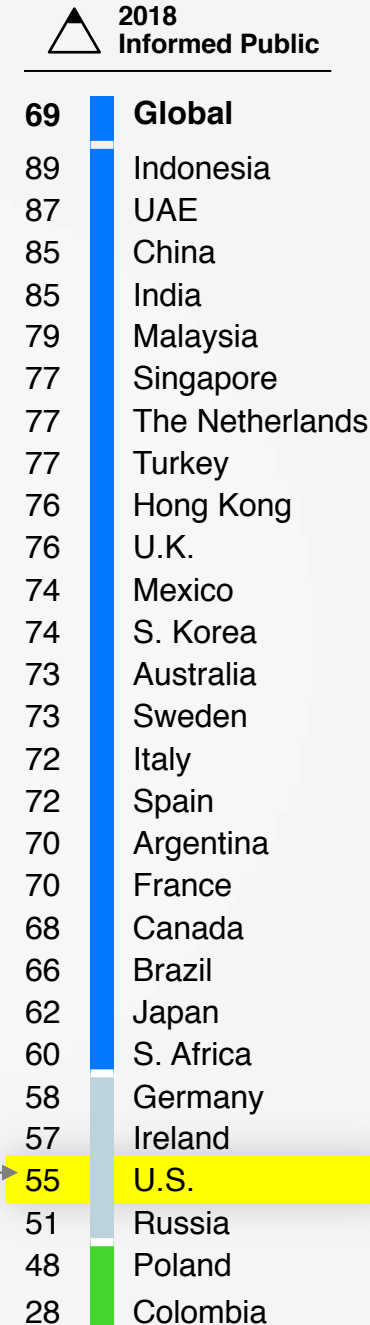
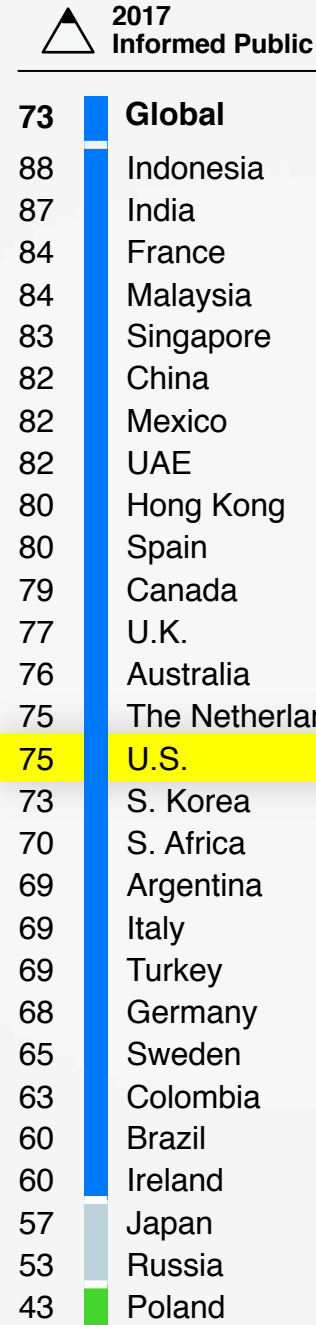


# Trust in Healthcare Informed Public Declines in 16 of 28 Markets

Percent trust in the health sector,  
informed public, and change from  
2017 to 2018

A 4-point decline in Trust in health, Globally

Source: 2018 Edelman Trust Barometer. TRU\_IND. 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), industries shown to half of the sample. Informed public, 28-market global total.



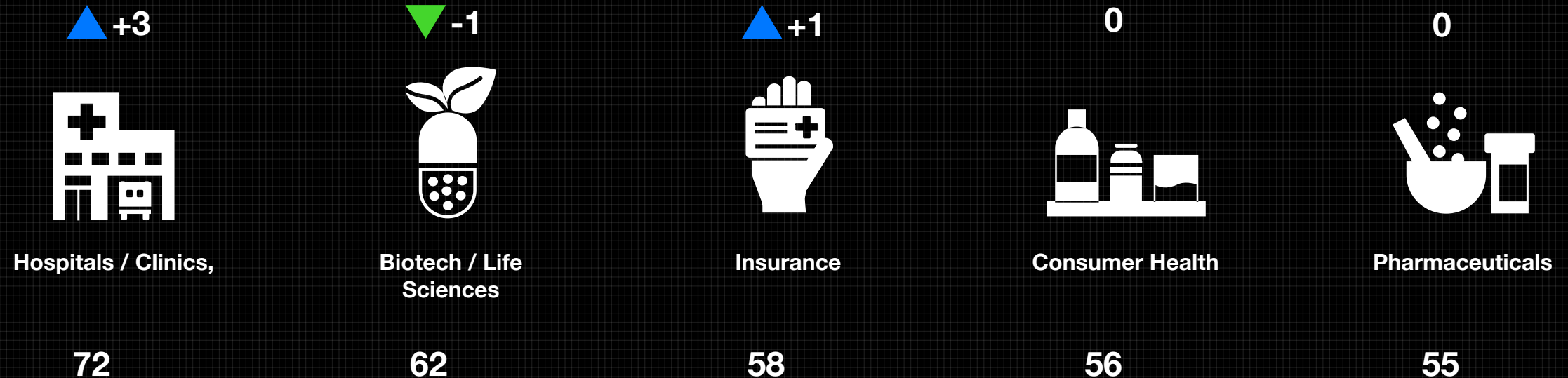
## Biggest changes



U.S. trust in healthcare  
crashes 20 points

# Global Trust Fluctuation in Health Sub-Sectors Seems Minimal, Different Story at Market Level

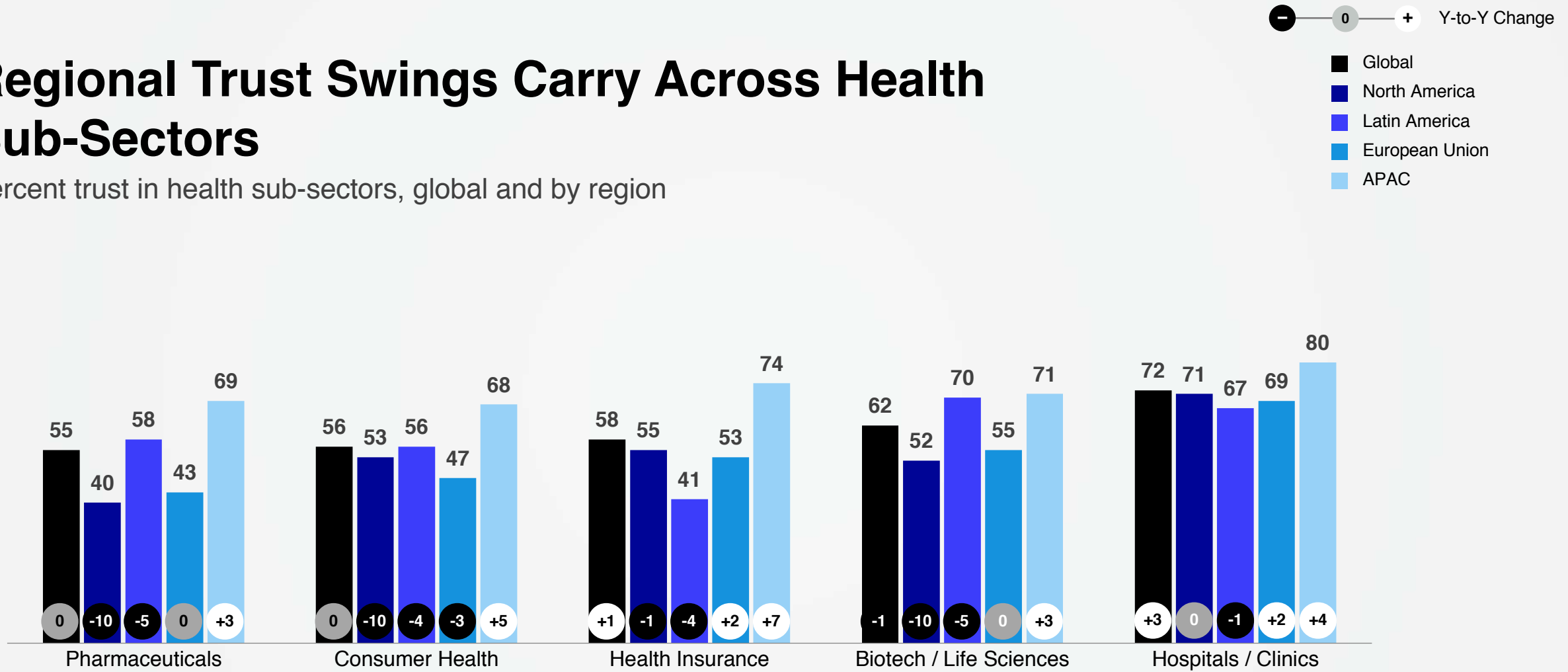
Percentage point change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

# Regional Trust Swings Carry Across Health Sub-Sectors

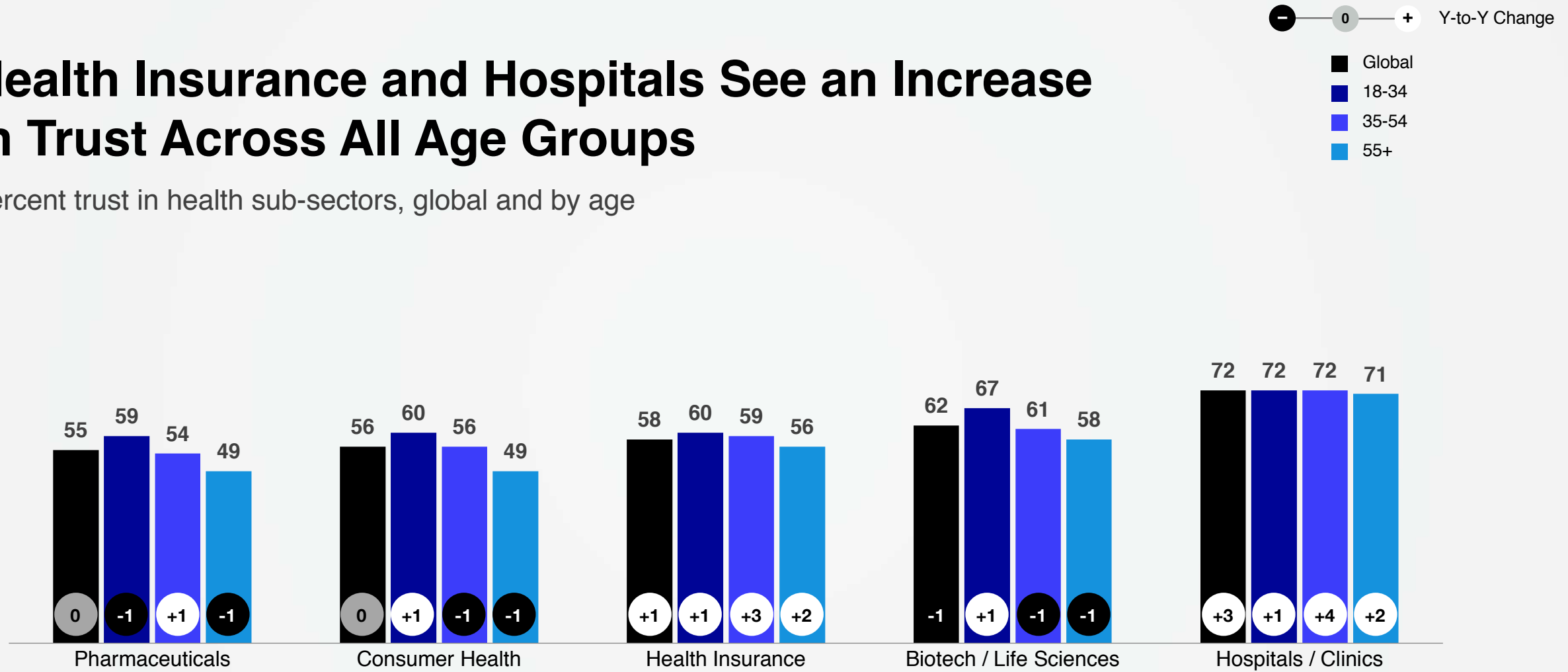
Percent trust in health sub-sectors, global and by region



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total and by region.

# Health Insurance and Hospitals See an Increase in Trust Across All Age Groups

Percent trust in health sub-sectors, global and by age



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total and by age.

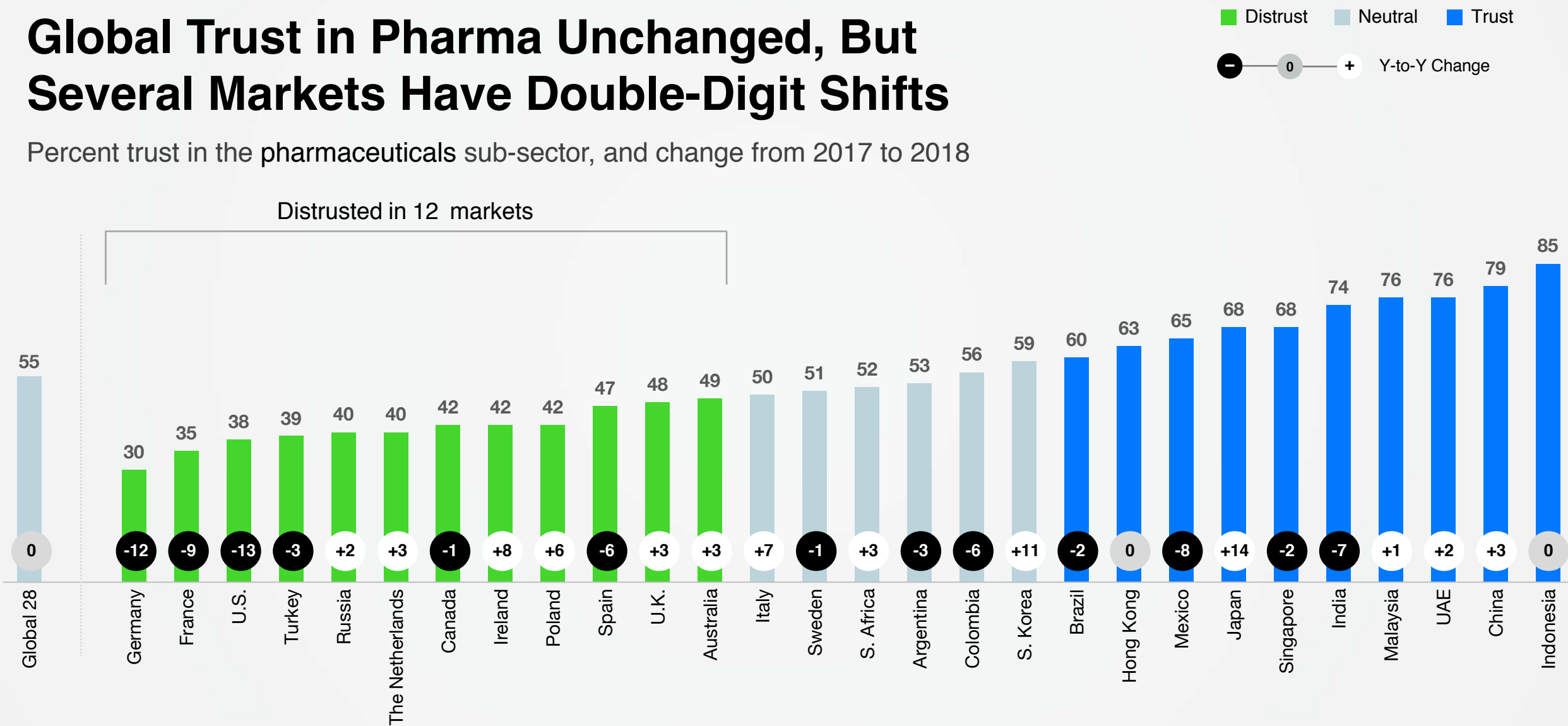


A low-angle, black and white photograph of several skyscrapers reaching towards the sky. Overlaid on the image are several thin, blue, wavy lines that create a sense of motion and data flow, starting from the left and curving across the frame.

# **2018 Edelman Trust Barometer Health Sub-sector Data**

# Global Trust in Pharma Unchanged, But Several Markets Have Double-Digit Shifts

Percent trust in the pharmaceuticals sub-sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.



# Notable Trust Shifts in Pharmaceuticals

## U.S. -13

Pharma industry blamed for high cost of drugs and aggressive marketing of opioids as addiction reaches epidemic levels

## France -9

9,000 adverse events reported with reformulation of Levothyrox, in addition to ongoing pricing concerns

## Japan +14

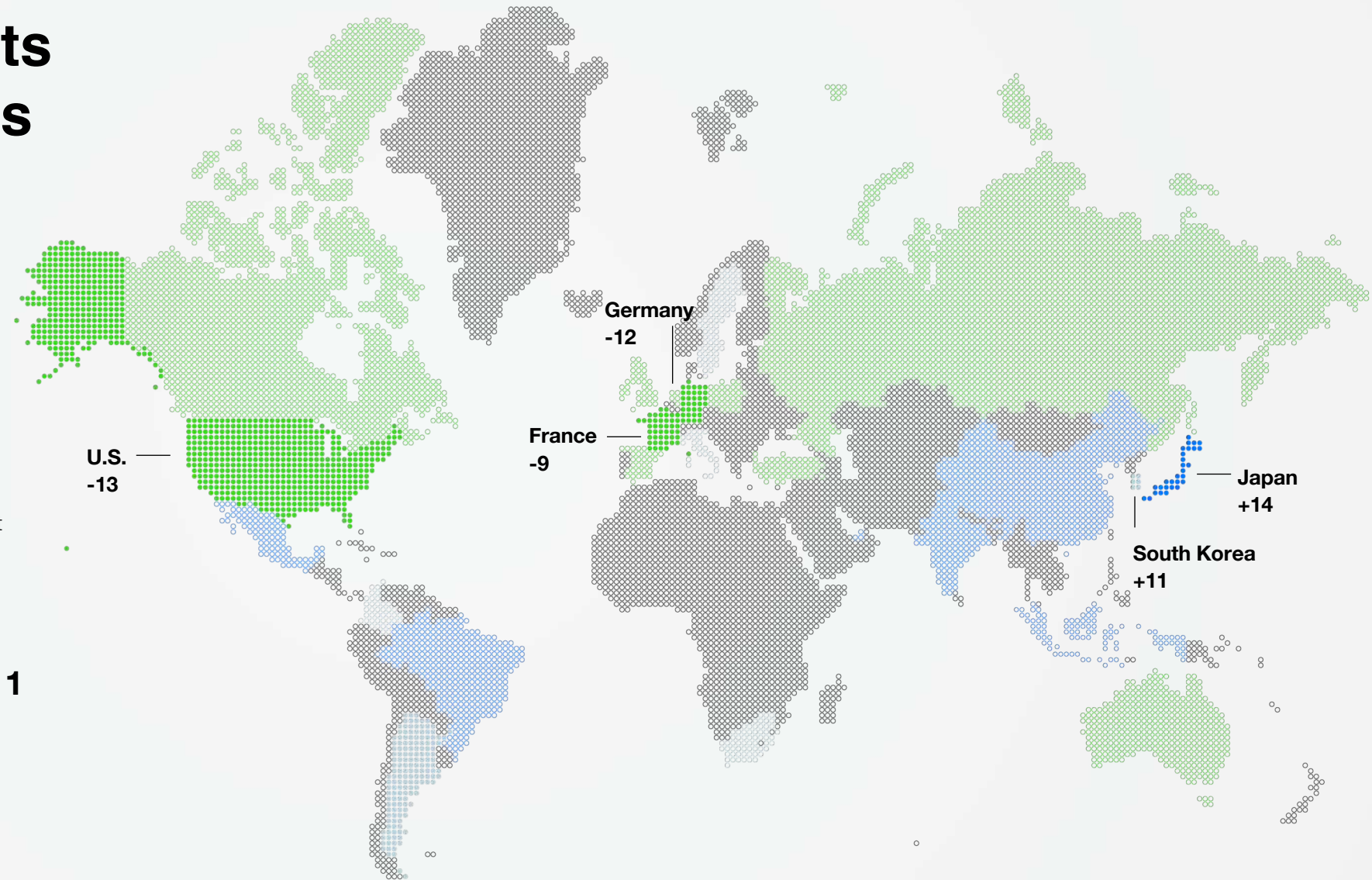
New medicines available to patients, including new oncology treatment launched by a Japanese pharma

## Germany -12

Headlines marked public outrage over pricing, in addition to perception that Pharma is primarily concerned with profit

## South Korea +11

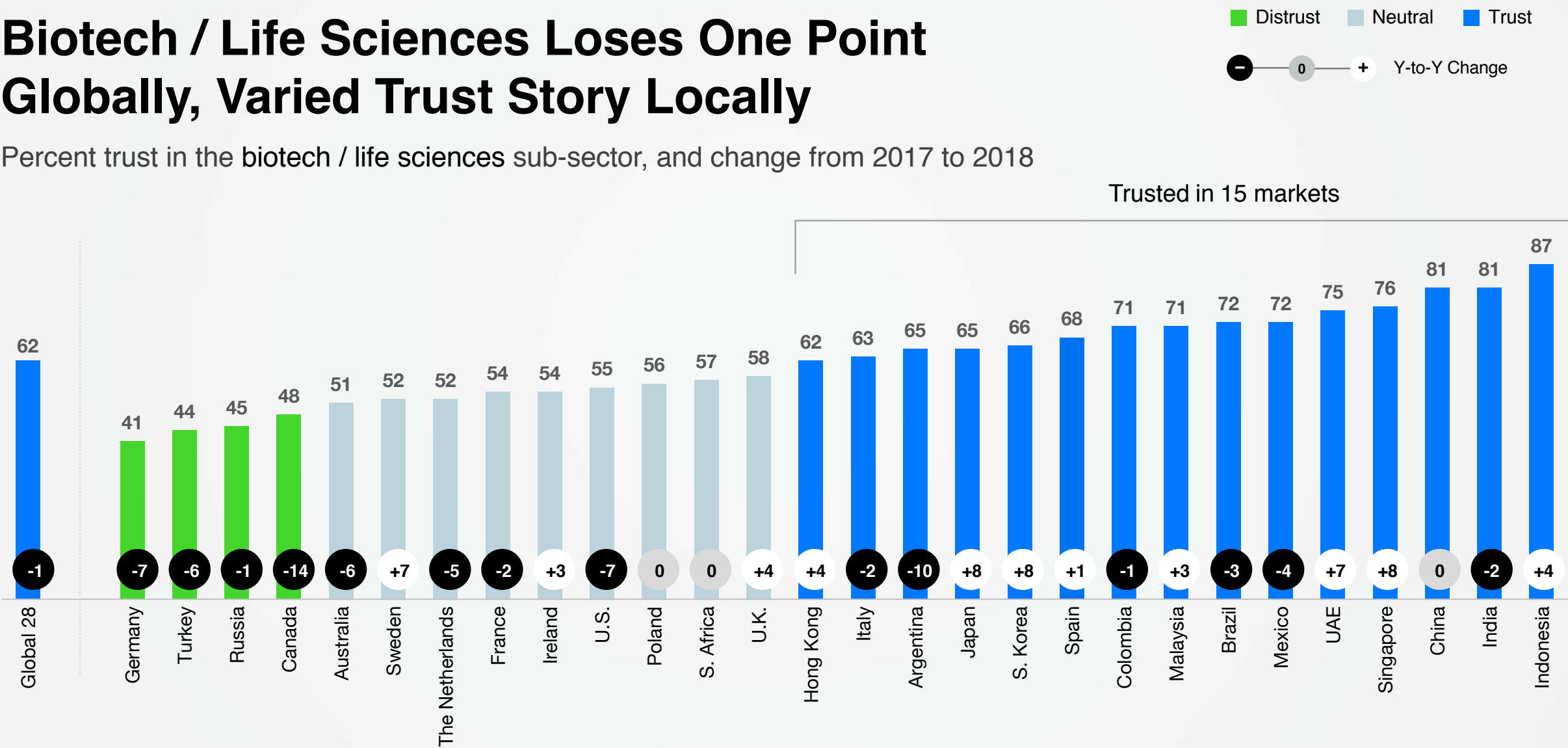
Pharma's adoption of anti-corruption regulation and marketing reform garnered public approval



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

# Biotech / Life Sciences Loses One Point Globally, Varied Trust Story Locally

Percent trust in the biotech / life sciences sub-sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.



# Notable Trust Shifts in Biotech / Life Sciences

■ Distrust ■ Neutral ■ Trust

## Canada -14

Increased scrutiny on the high prices of biologics, in addition to media reports questioning safety and quality of patient support programs and facilities

## Argentina -10

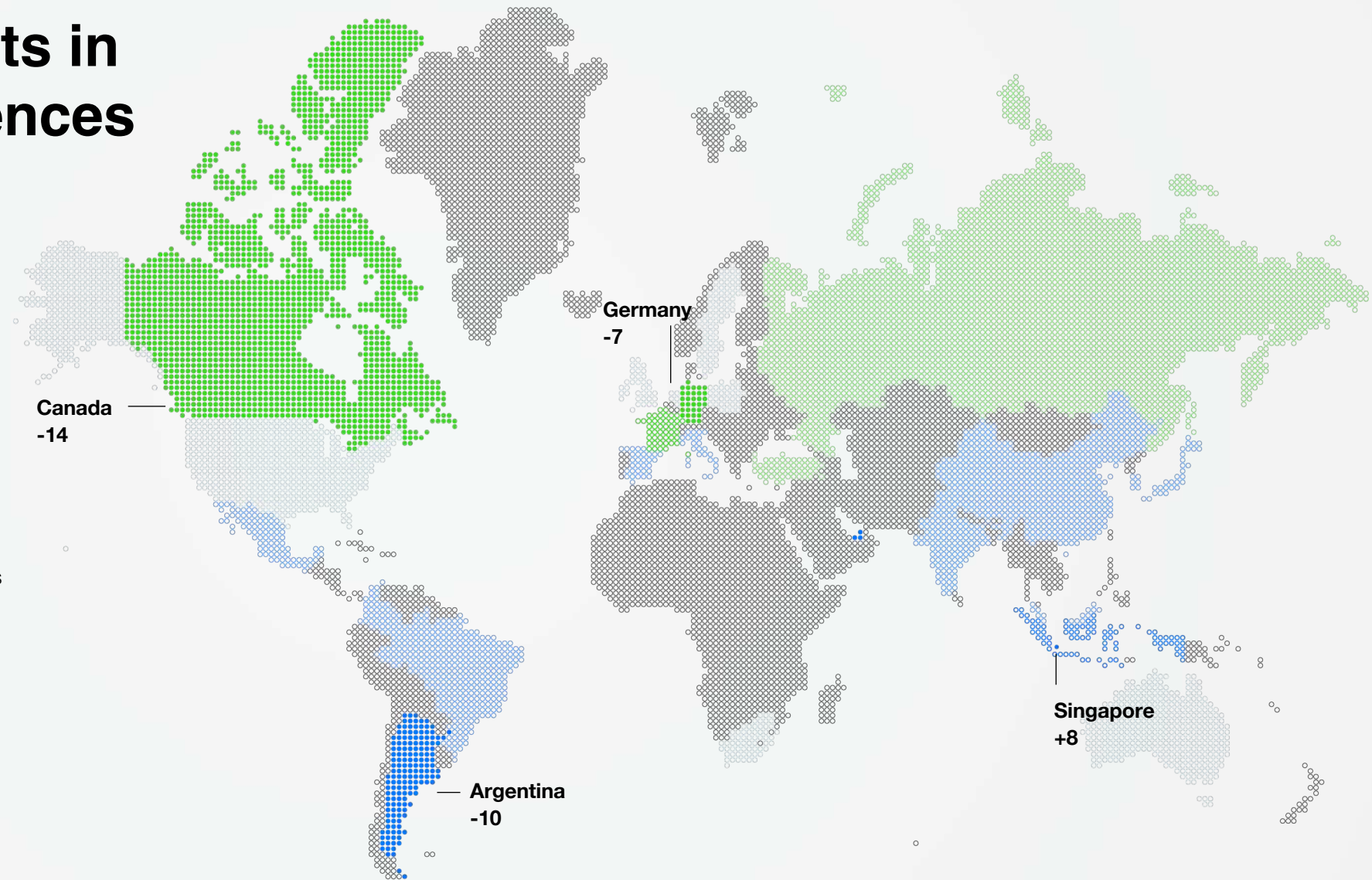
Public distrust of biotechnology in agriculture, particularly gene-edited food, may have impacted trust in this sub-sector

## Germany -7

Linked to Pharma with high pricing, in addition to low public understanding of Biotech

## Singapore +8

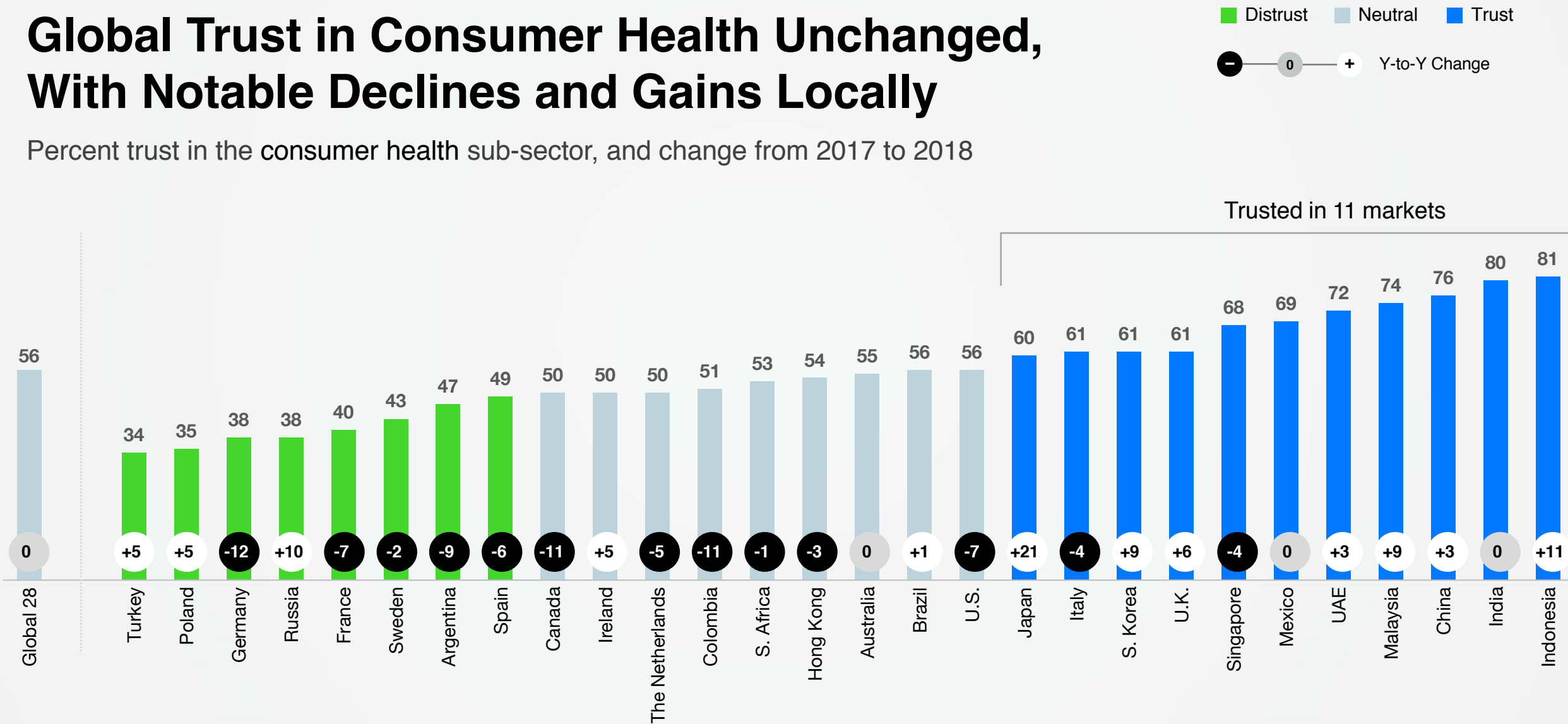
Increasing presence of established and start-up biotechs, furthering country's goal to be a main hub for R&D



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

# Global Trust in Consumer Health Unchanged, With Notable Declines and Gains Locally

Percent trust in the consumer health sub-sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.



# Notable Trust Shifts in Consumer Health

■ Distrust ■ Neutral ■ Trust

## Germany -12

Merck KGaA and Pfizer made moves to sell their Consumer Health units, linking OTC to Pharma and pricing concerns

## Canada -11

Media questioned science behind vitamins claims, physicians debated responsible use of acetaminophen, adding to growing skepticism

## Colombia -11

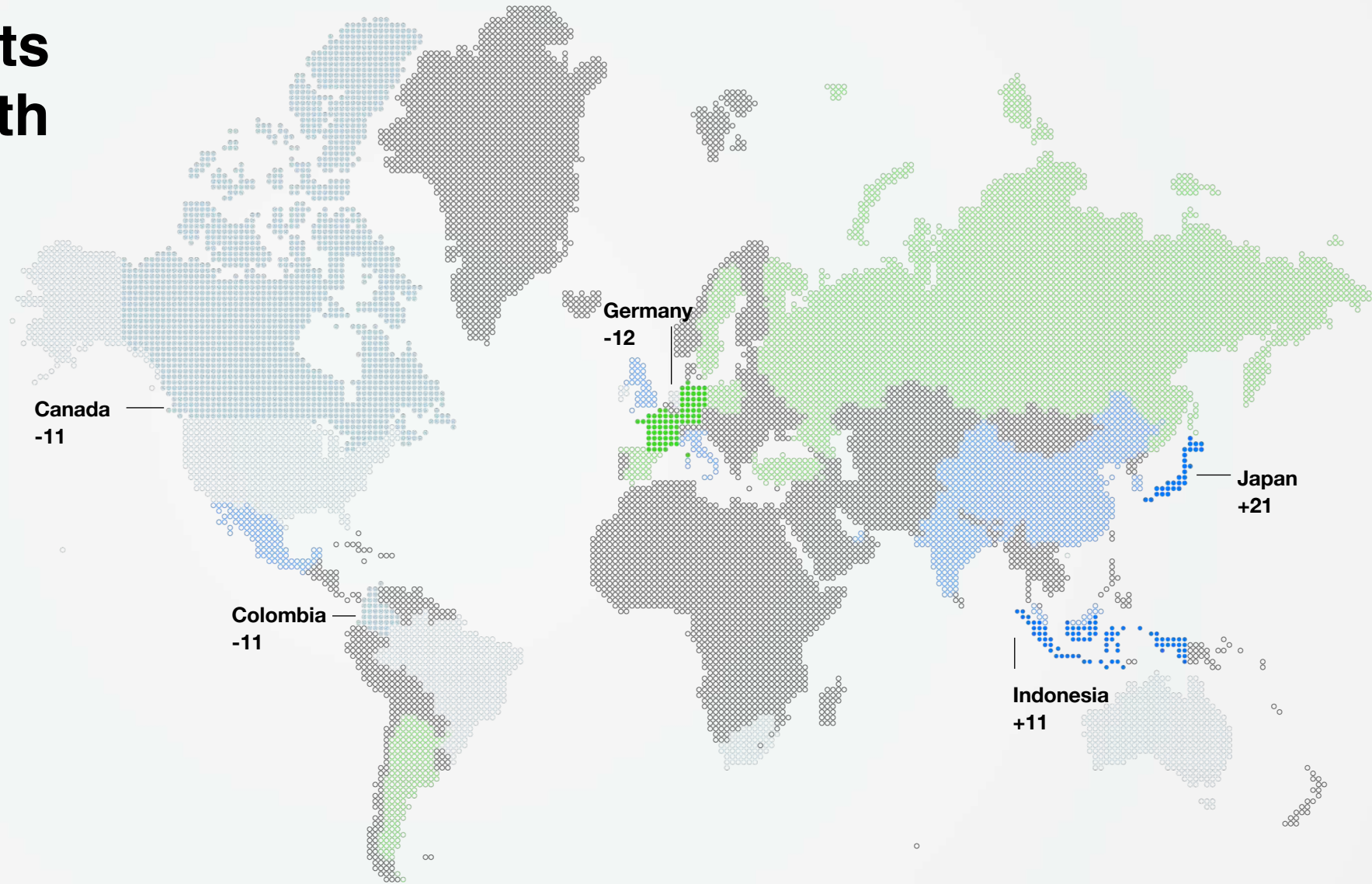
Negatively impacted by infighting between government, health system and private health companies

## Japan +21

Market expansion of highly effective OTC products, particularly those produced by Japanese companies

## Indonesia +11

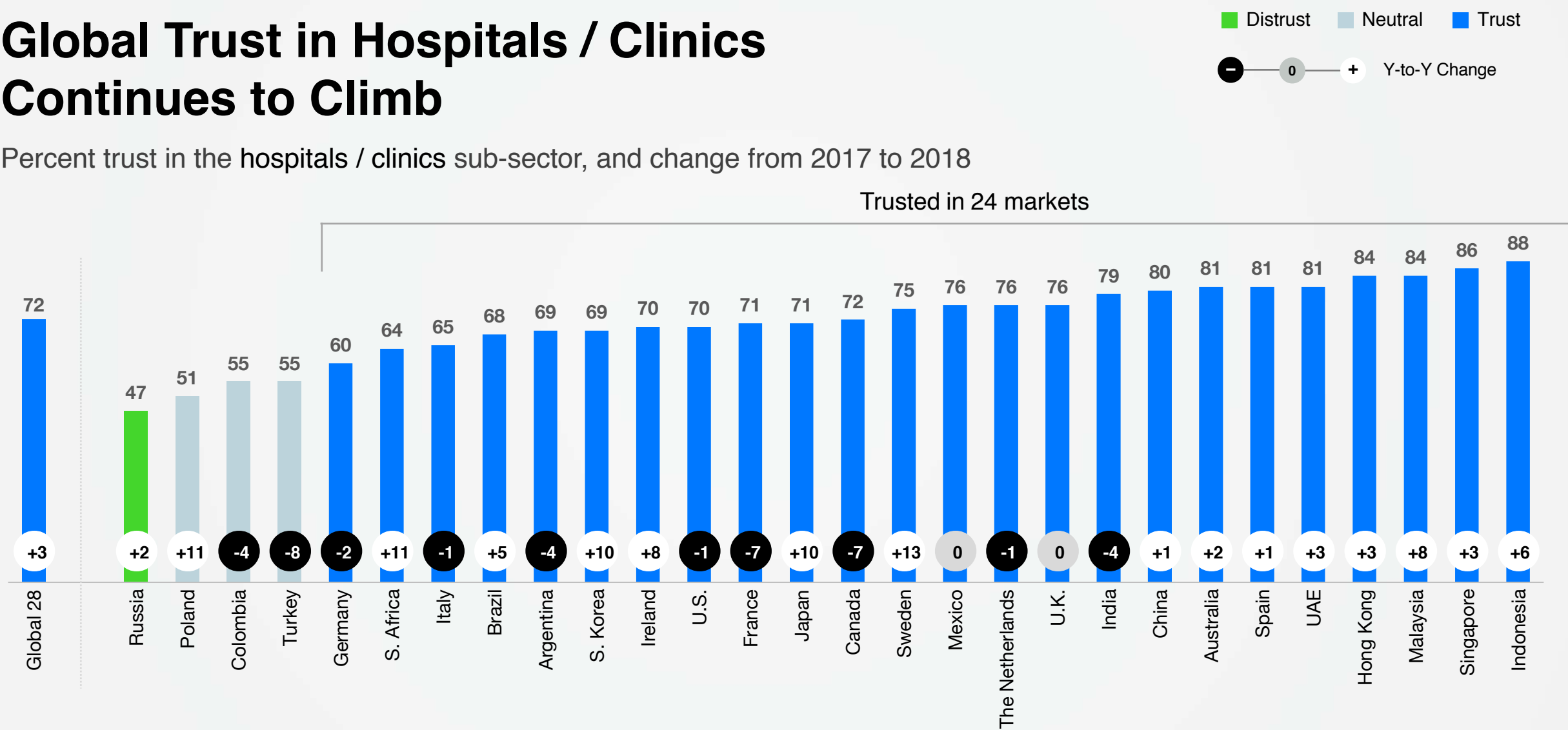
Consumer health products seen as safe, accessible and affordable in the face of several pharma safety and quality issues



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

# Global Trust in Hospitals / Clinics Continues to Climb

Percent trust in the hospitals / clinics sub-sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.



# Notable Trust Shifts in Hospitals / Clinics

## France -7

Reorganization of hospital system, including decreasing public funding and closing smaller facilities, shook public confidence

## Sweden +13

Strong hospital system, access to high-quality services and affordability of treatments linked to higher public trust

## Canada -7

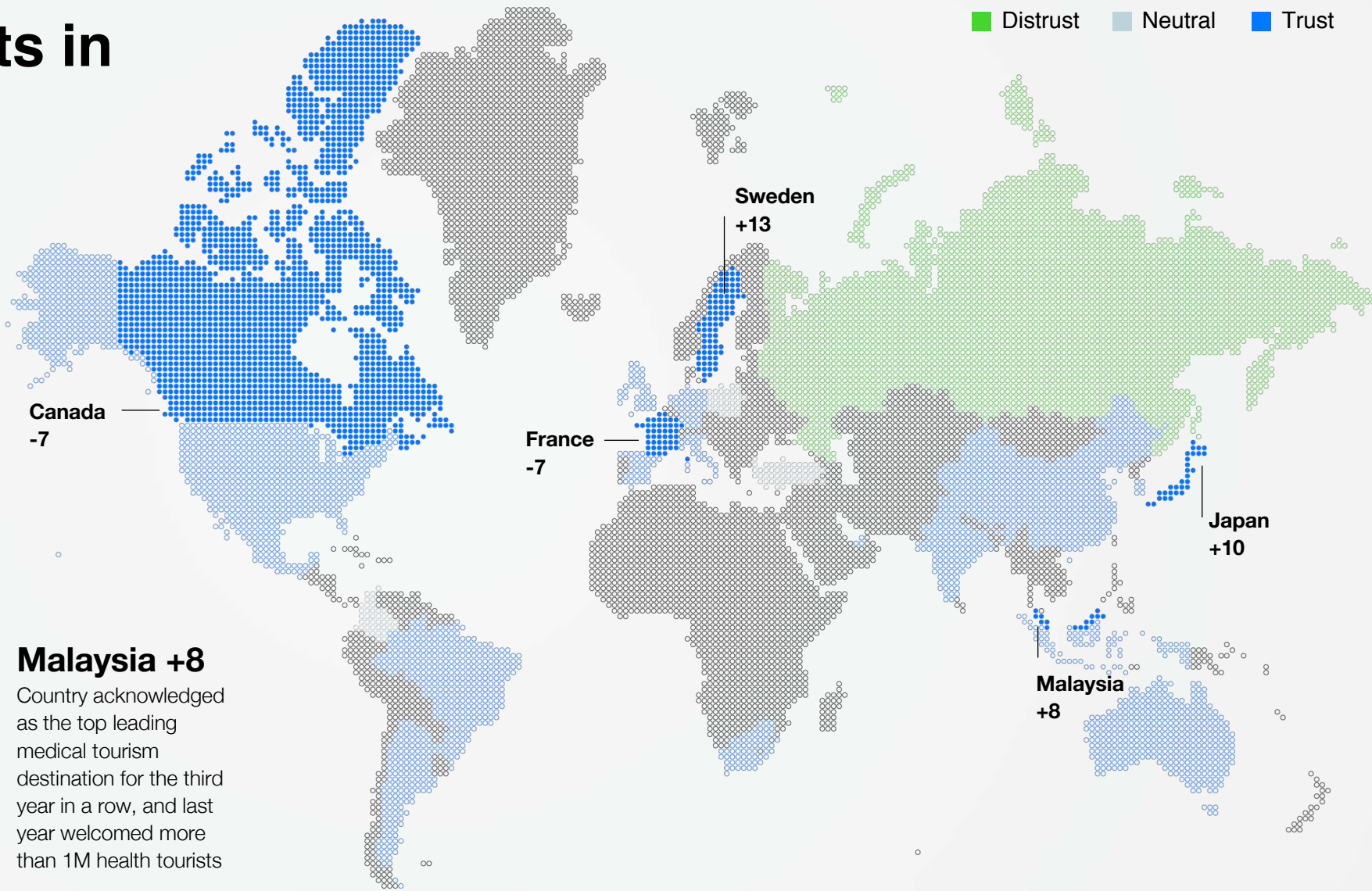
A shortage of beds and perceived slow adoption of health technology driving discontent

## Japan +10

Embarked on promoting global medical services, including elevating international hospitals for medical tourism

## Malaysia +8

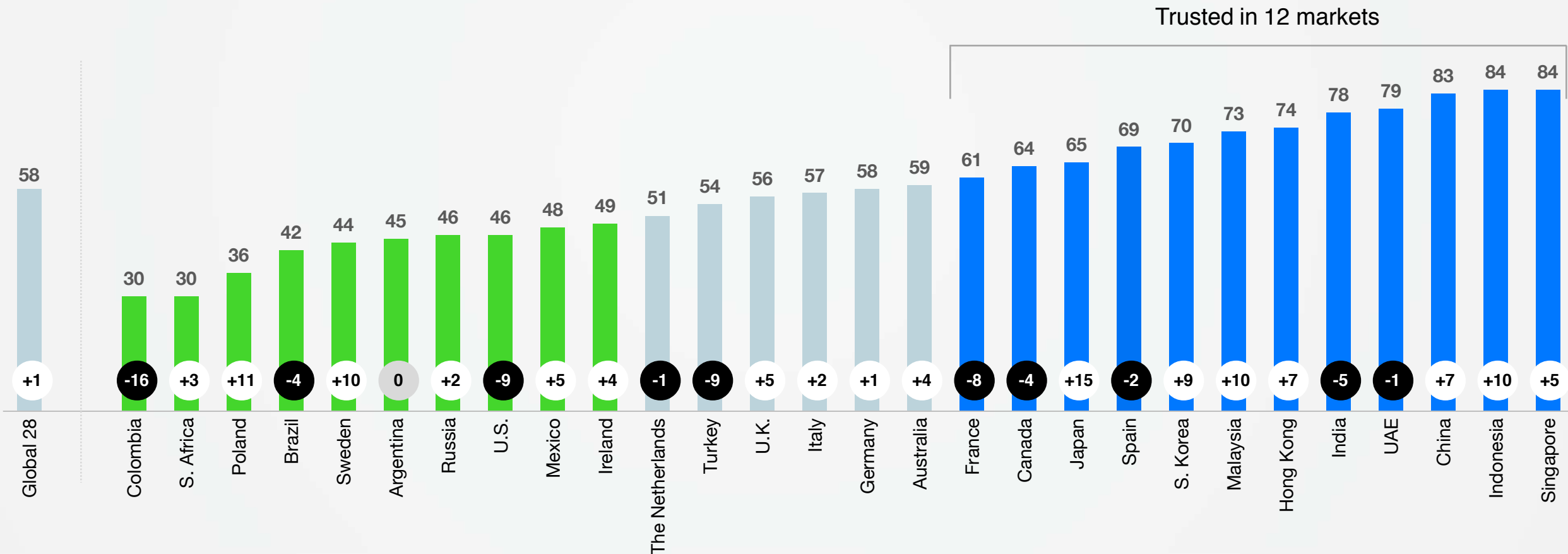
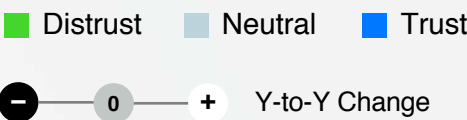
Country acknowledged as the top leading medical tourism destination for the third year in a row, and last year welcomed more than 1M health tourists



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

# Health Insurance Gains One Point Globally, Moving Toward Trust

Percent trust in the health insurance sub-sector, and change from 2017 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.



# Notable Trust Shifts in Health Insurance

## Colombia -16

Reports uncover that \$160 million in tax dollars was embezzled by health system officials

## Japan +15

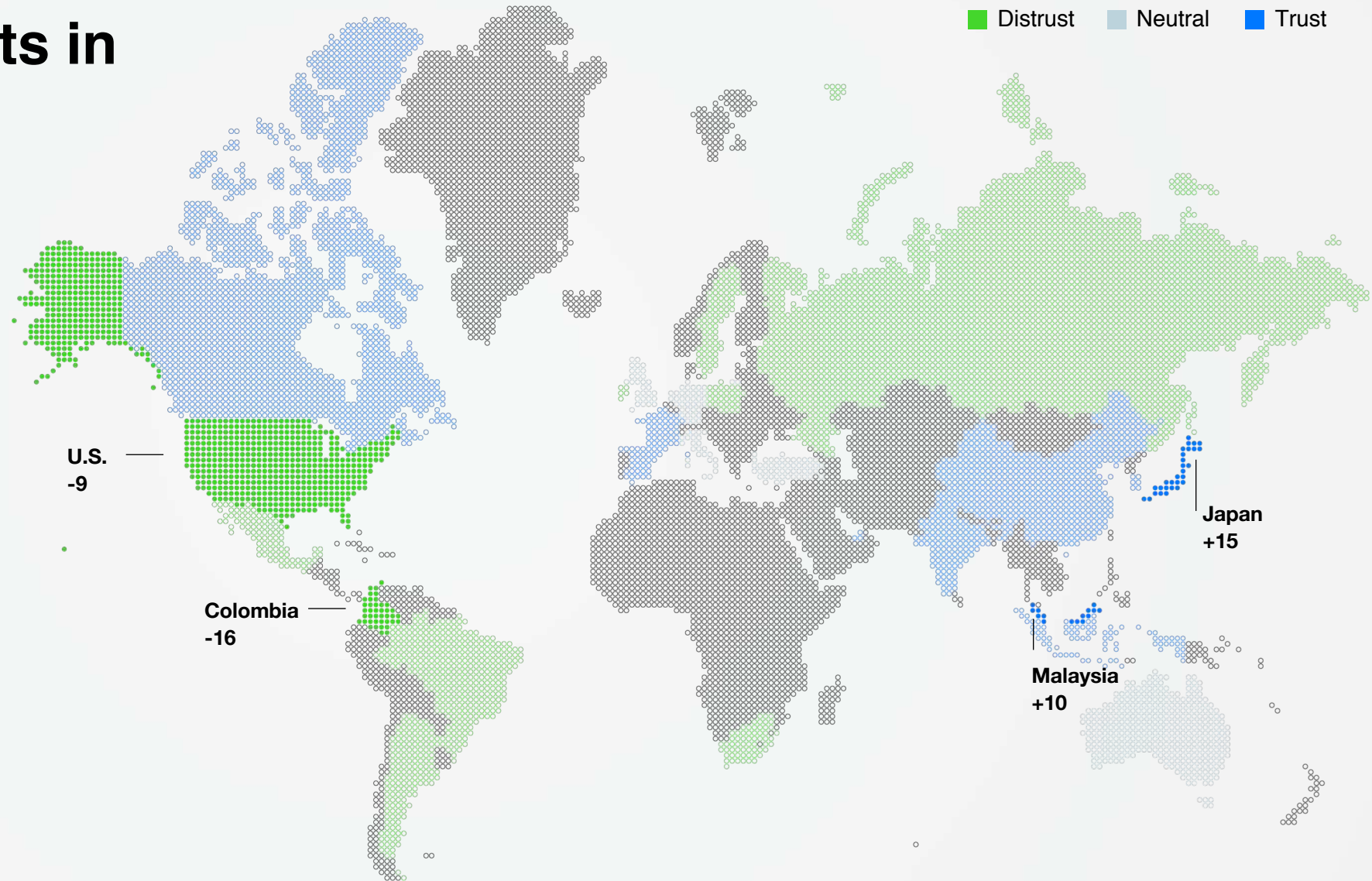
High public approval of government's announced plans to reduce drug prices and simplify medical expenses

## U.S. -9

Uncertainty over the ACA raged and several private insurers dropped out of markets, in addition to ongoing war of words on drug pricing

## Malaysia +10

Private insurers launched B2C campaigns focused on customer health, in addition to cost-saving measures introduced by the Ministry of Health

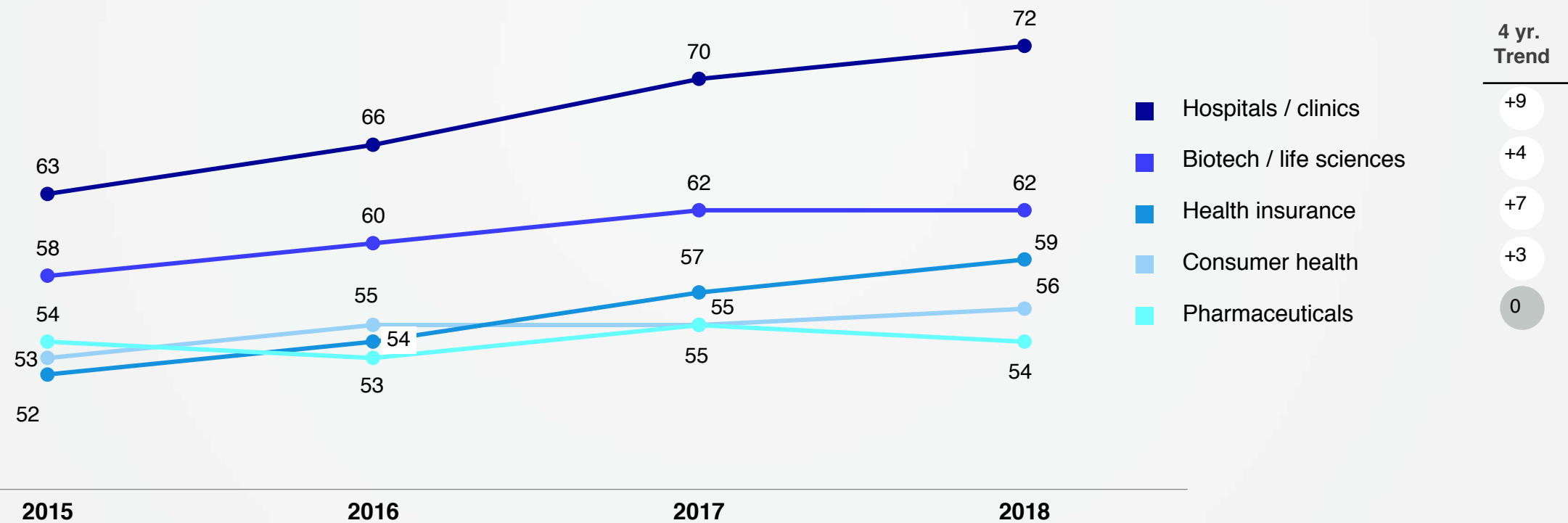


Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

# Four-Year Trend Upward in Trust in all Sub-Sectors Except Pharma

Percent trust in the health sub-sectors, 2015 to 2018

Change, 2015 to 2018



Source: 2018 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health 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”. (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 27-market global total.





# Navigating a Polarized World



A dark, grayscale photograph of a hospital hallway. The hallway is long and narrow, with rows of doors on both sides. A person is walking away from the camera in the distance, towards a brighter area at the end of the hallway. The lighting is dim, creating a somber and institutional atmosphere.

# Every Healthcare Company Must **Be Your Own Publisher**

# Health Company Consumer Information Seen as Credible, Trust in Accuracy of Media Lower

## Trust in Media

53%

Trust the media to report accurate information about healthcare

## Credibility of Health Companies

64%

Credibility of information provided by health companies about medical conditions and their treatments

Source: 2018 Edelman Trust Barometer. DRV\_HEA\_CRE. How credible is the information that is provided by healthcare companies about medical conditions and their treatments? (Top 4 Box, Trust), question asked of one-fifth of the sample. DRV\_HEA\_REP. How much do you trust the media to report accurate information about healthcare, such as diseases, treatments and prevention? (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

## Present Content in Multiple Formats

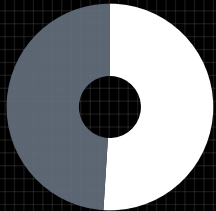
Which do you believe is giving you the truth?

**51%**

Personal experiences

**49%**

Data

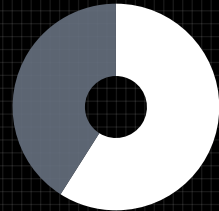


**59%**

Video

**41%**

Words

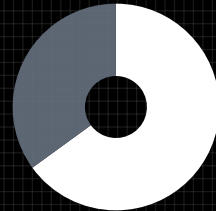


**65%**

Spontaneous speaker

**35%**

Rehearsed speaker

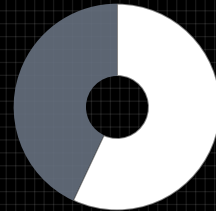


**57%**

Detailed argument

**43%**

Short and simple argument



Source: 2018 Edelman Trust Barometer. COM\_RFB. 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. Question asked to half of the sample. General Population, 28-market global total.

# Corporate Content and Format Matter to Media

Journalists covering biotech, pharma, healthcare and health business news share their preferences on company communications

## Facts & Stats

Prefer traditional numerical and fact-based disclosures

**86%**

---

## Visual

Would like to see more visual ways of sharing information

**78%**

---

## Social Media

Consult the company's social media for reporting purposes

**58%**

---

Source: Edelman 2018 JPM Survey. Somewhat Agree+Strongly Agree: When reporting on the sector, I prefer traditional numerical and fact-based disclosures. When researching a company I am reporting on, I would like to see more visual ways of sharing information (e.g., charts, infographics). When reporting on a company, I consult the company's social media.

A dark, grayscale photograph of a hospital hallway. The hallway is long and narrow, with a person walking away from the camera in the distance. The walls are lined with doors and windows, and the floor is polished. The lighting is dim, creating a somber and quiet atmosphere.

Every Healthcare Company Must

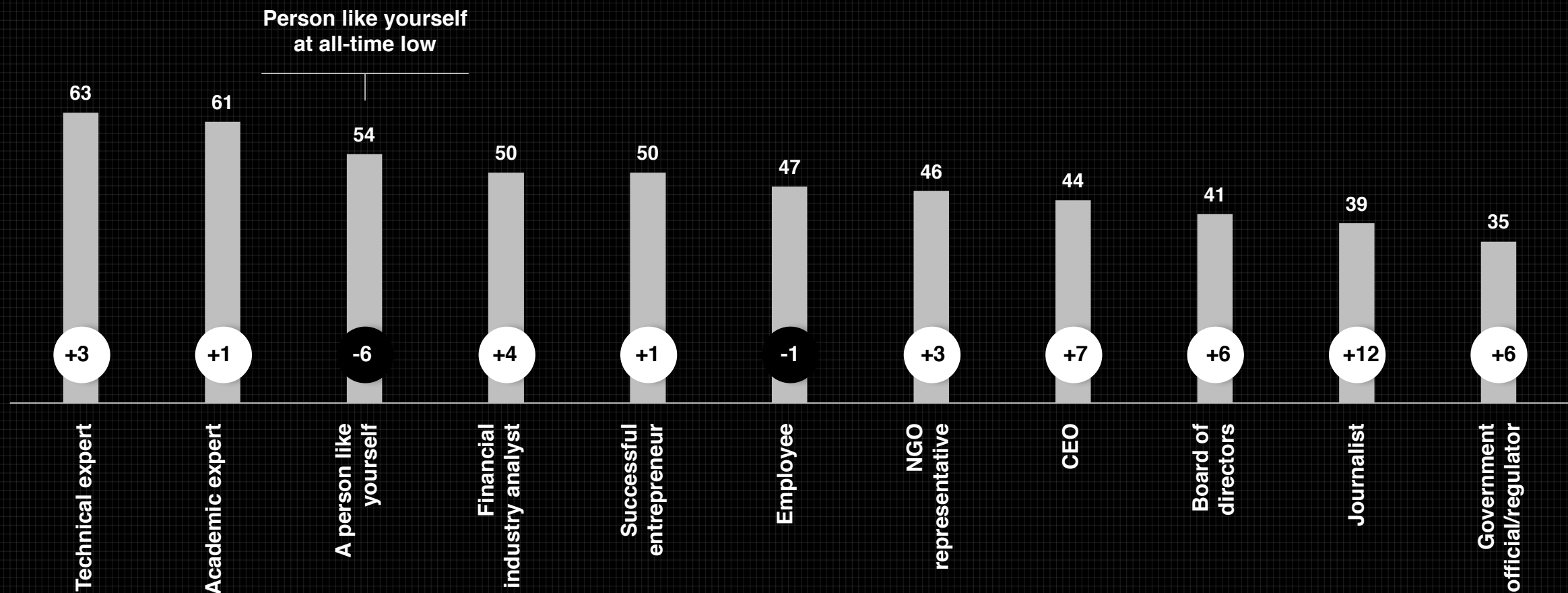
# Activate the Chorus to Tell the Story



# Voices of Authority Regain Credibility

Percent who rate each spokesperson as very/extremely credible, and change from 2017 to 2018

Y-to-Y Change



Source: 2018 Edelman Trust Barometer. CRE\_PPL. 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), question asked of half of the sample. General population, 28-market global total.

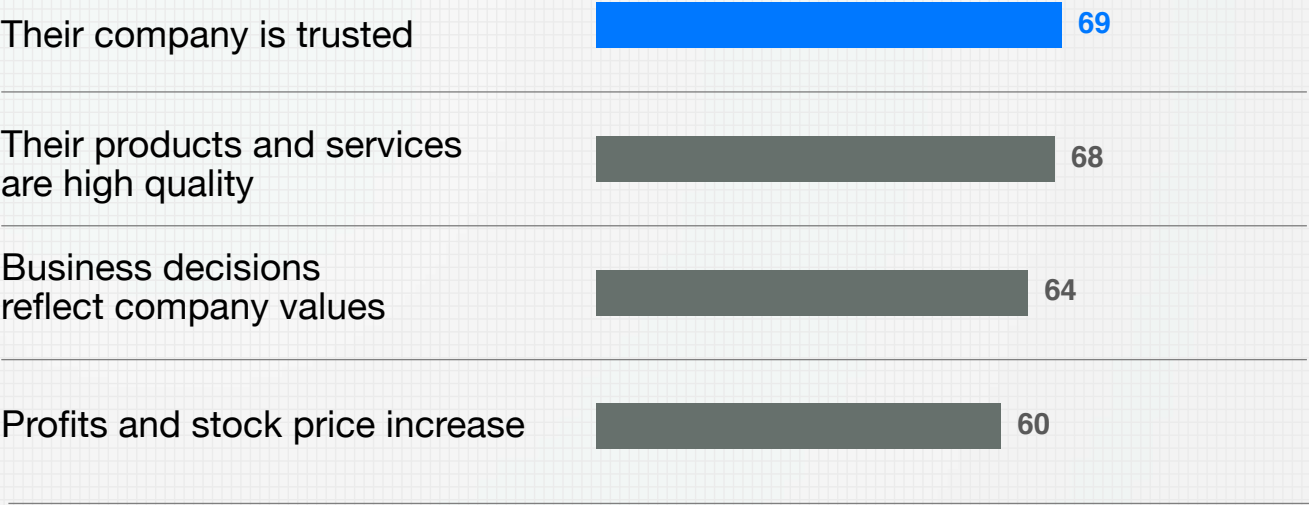
# Business Is Expected to Lead

Percent who agree and percent who say each is one of the most important expectations they have for a CEO

Percent who say that CEOs should take the lead on change rather than waiting for government to impose it

64%

## For CEOs, building trust is job one

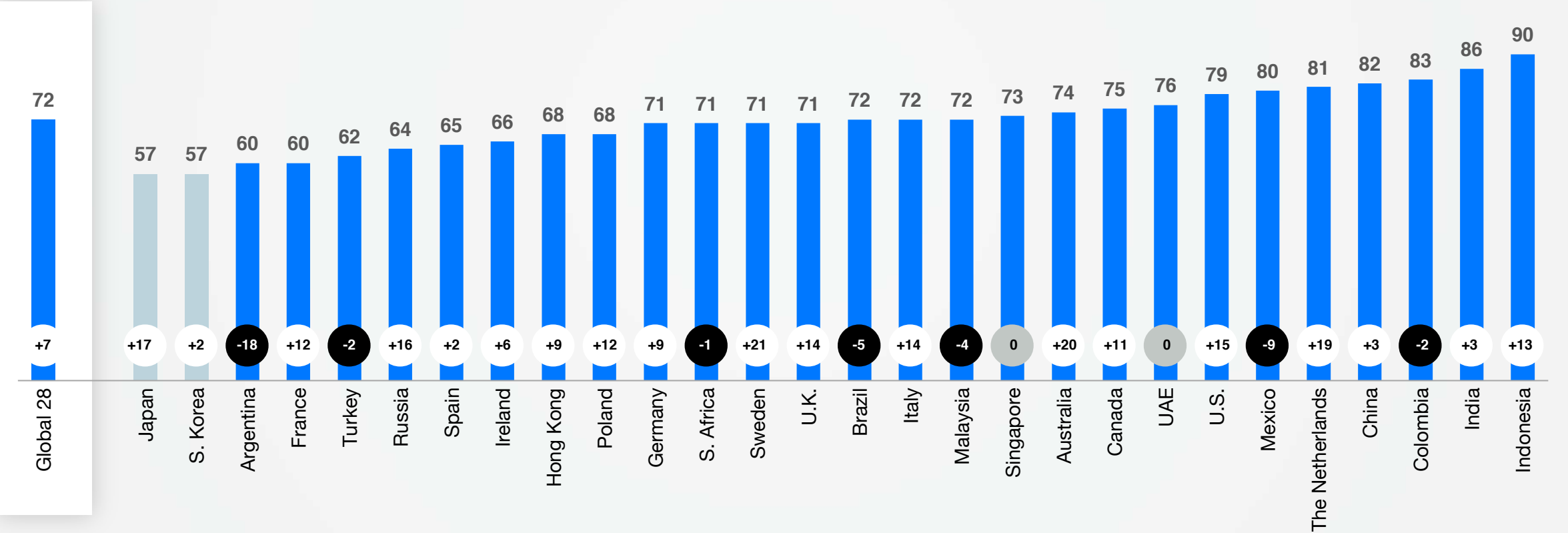


Source: 2018 Edelman Trust Barometer. CEO\_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. CEO\_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? (Most important responsibility, code 3), question asked of half of the sample. General population, 28-market global total.

2. ACTIVATE THE CHORUS

# Employers Trusted Around the World

Percent trust in employer, and change from 2016 to 2018

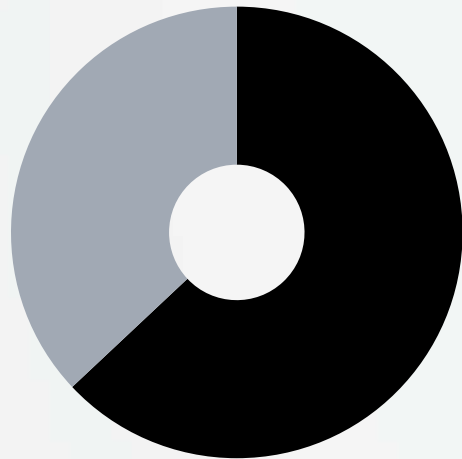


Source: 2018 Edelman Trust Barometer. TRU\_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General population, 28-market global total.

Note: 2016 data was taken from Q525-526. Thinking about your own company and other companies in your industry, please indicate how much you trust each 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), question asked of half of the sample. General population, 28-market global total.

## Engage in Conversation Across the Business

Which is more believable about a company?



**63%**

**Company's  
social media**

**37%**

**Company's  
advertising**

Percent who agree:

**52%**

**CEOs**

should regularly  
communicate directly to the  
public using social media

**64%**

**Employees**

should participate in  
their company's social  
media activities

Source: 2018 Edelman Trust Barometer. COM\_RFB. You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. 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. Choices shown to half of the sample. . CEO\_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. CEO\_EMP\_EXP. Below is a list of potential expectations that you might have for a company employee. Thinking about employees in general, how would you characterize each using the following five-point scale. (At least some expectation, codes 3-5), question asked of half of the sample. General Population, 28-market global total.

A dark, grayscale photograph of a hospital hallway. The hallway is long and narrow, with a person walking away from the camera in the distance. The walls are lined with doors and windows, and the floor is polished. The overall mood is somber and contemplative.

Every Healthcare Company Must

# Move Beyond the Transaction



## Treat the Whole Person

I would trust a pharmaceutical, drug or biotech company more if it also provided information, tools and support to help me manage my disease.

68%

AGREE

Source: 2018 Edelman Trust Barometer. DRV\_HEA\_AGR. How much do you agree or disagree with the following statement? (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, 28-market global total.

### 3. BEYOND THE TRANSACTION

## Share Your Vision for Health Tech and its Benefits

How is the application of technology to healthcare most likely to impact healthcare in the next 5 years?

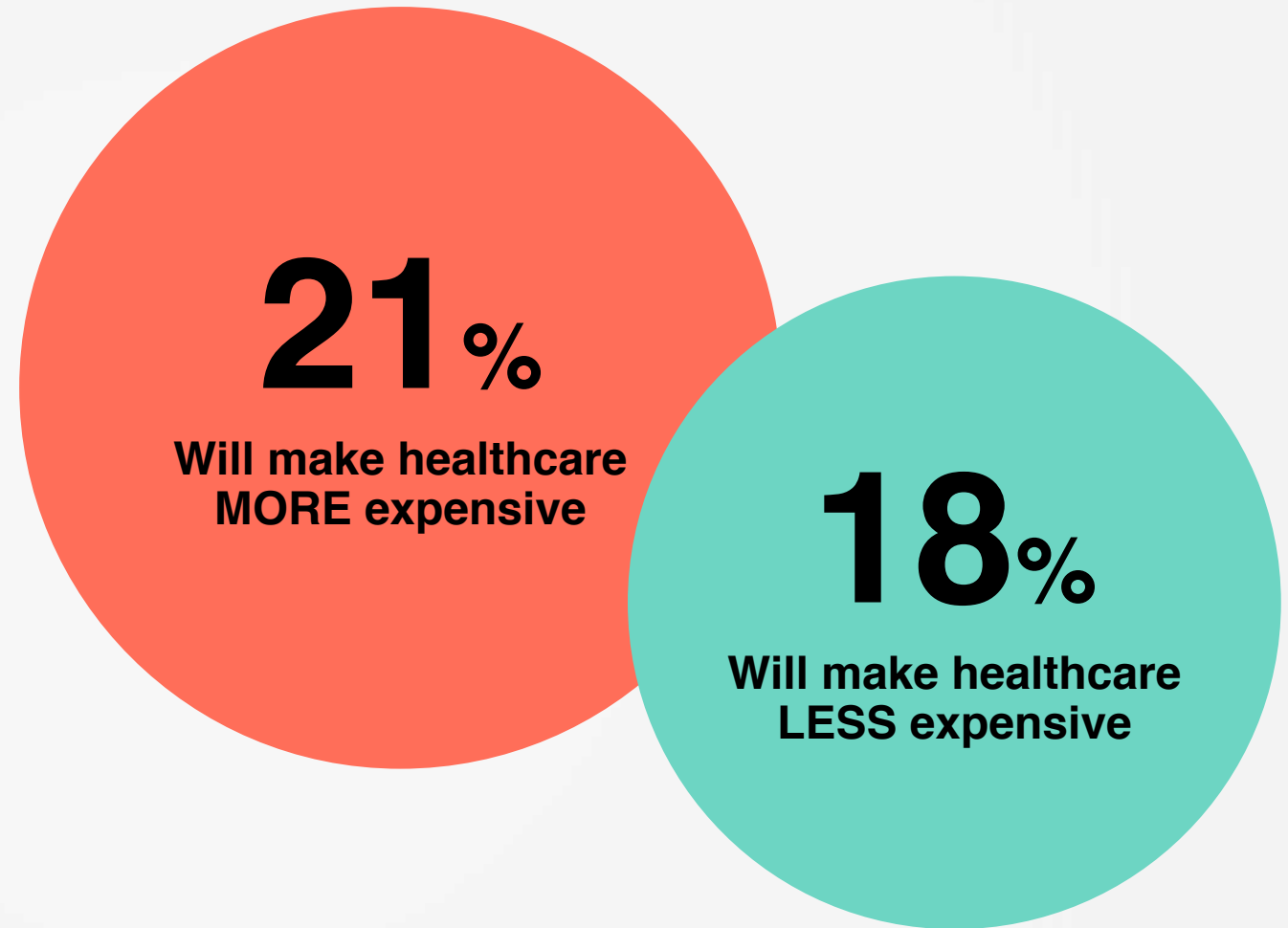
Source: 2018 Edelman Trust Barometer. DRV\_HEA\_APP. How is the application of technology to healthcare most likely to impact healthcare in the next 5 years? Question asked of one-fifth of the sample. General population, 28-market global total.



## Opinions Divided on the Impact of Tech to Cost of Healthcare

How is the application of technology to healthcare most likely to impact healthcare in the next 5 years?

Source: 2018 Edelman Trust Barometer. DRV\_HEA\_APP. How is the application of technology to healthcare most likely to impact healthcare in the next 5 years? Question asked of one-fifth of the sample. General population, 28-market global total.



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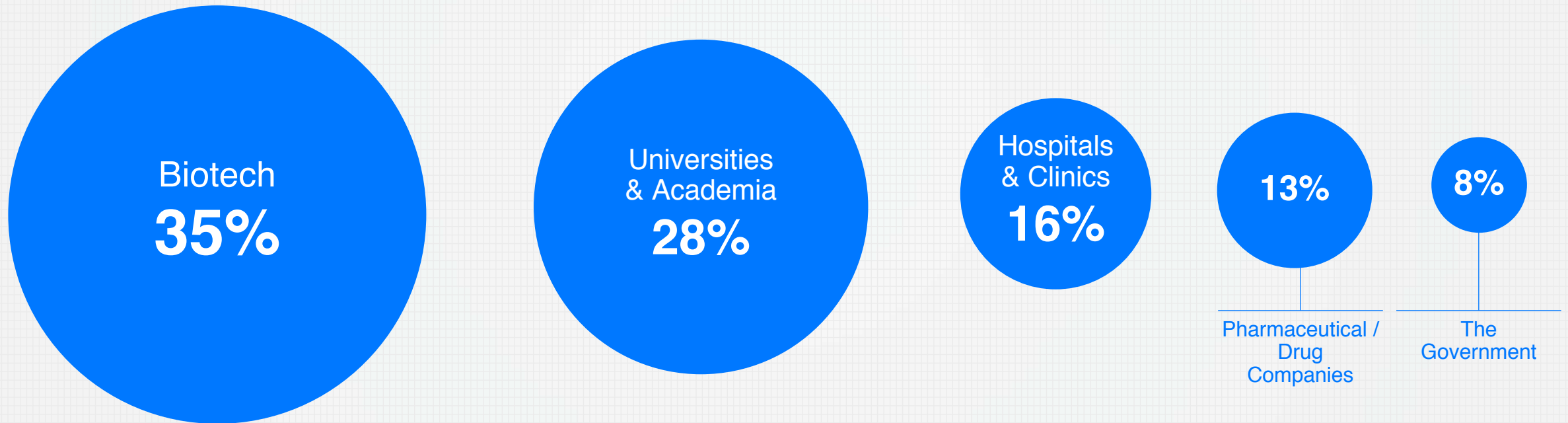
Every Healthcare Company Must

# Be the Lab, Not the Sales Force



## Biotech Seen as Delivering Advances

Followed by Universities / Academia and Hospitals / Clinics



Source: 2018 Edelman Trust Barometer. DRV\_HEA\_DEL. Which of the following is the most likely to deliver important new treatments that cure diseases or improve human health? Question asked of one-fifth of the sample. General population, 28-market global total.

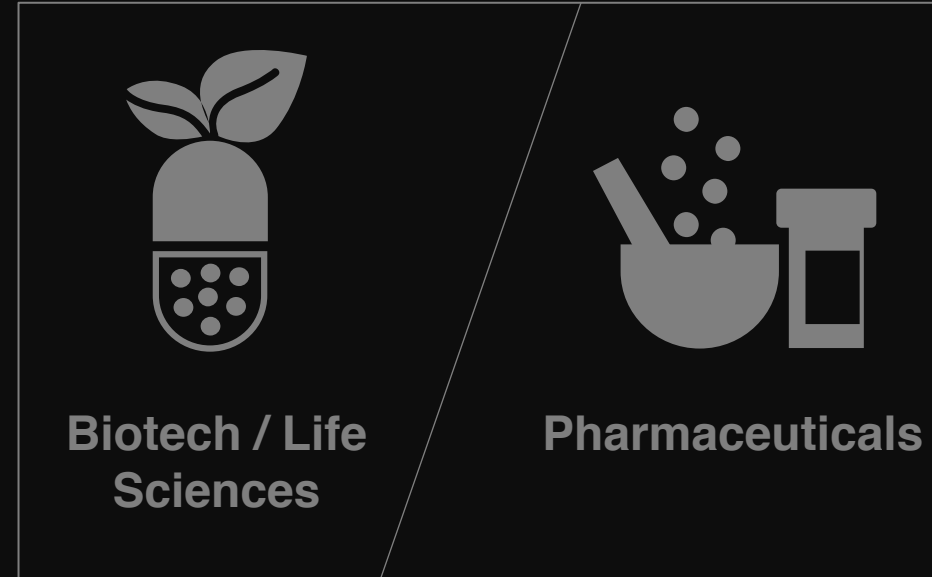
## Pharma vs. Biotech Category Not Understood

“

I'm not sure I know what  
their differences are”

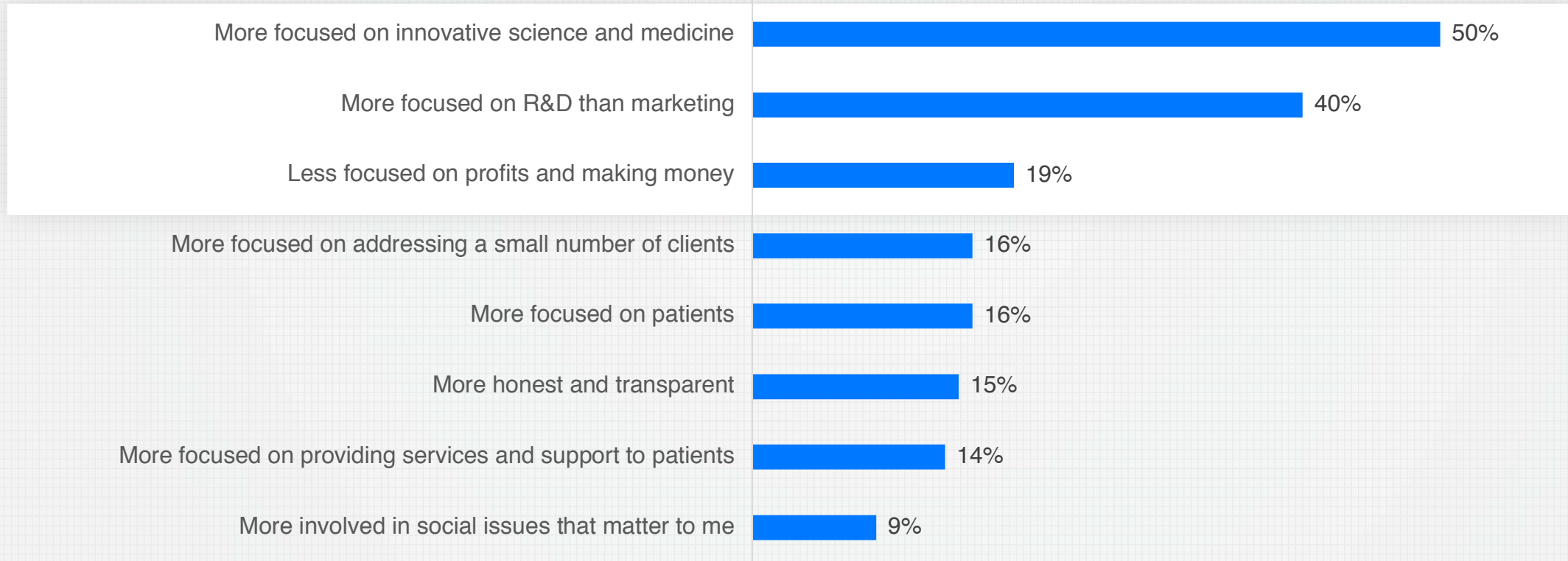
Nearly

1 in 5 AGREE



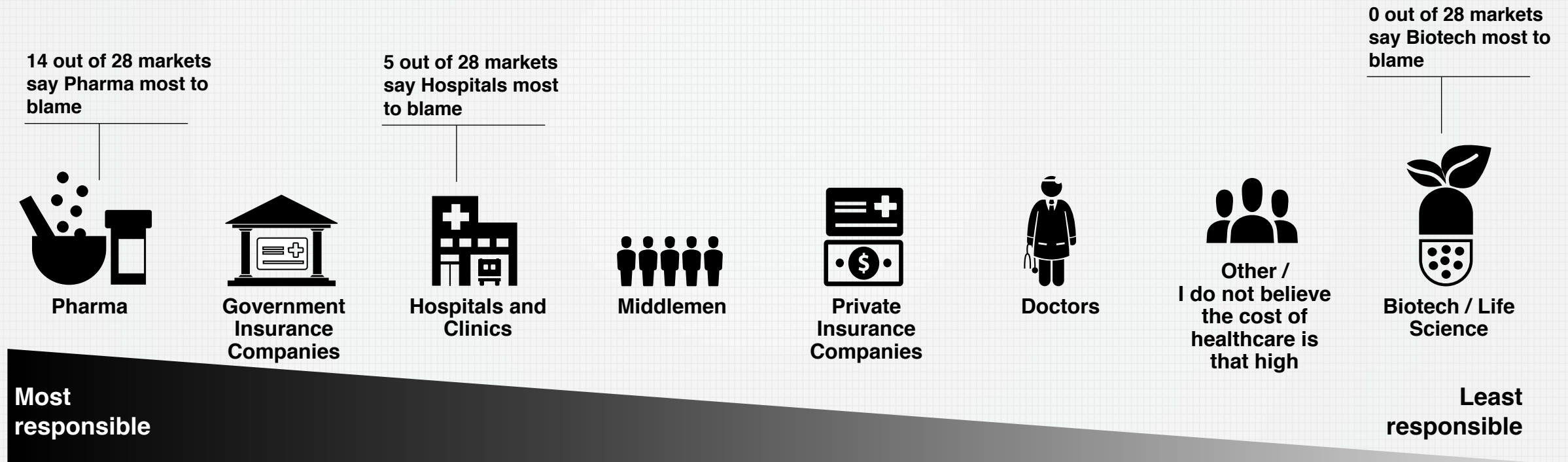
## Biotech Seen as the Laboratory vs Pharma

Respondents' input on how biotech companies differ from pharmaceutical companies



Source: 2018 Edelman Trust Barometer. DRV\_HEA\_DIF. How do you think Biotech companies differ from pharmaceutical companies? Question asked of one-fifth of the sample. General population, 28-market global total.

# All Health Companies Must Address Cost, Pharma Takes Bulk of Blame



Source: 2018 Edelman Trust Barometer. DRV\_HEA\_HCH. Which of the following is most responsible for the high cost of healthcare? Question asked of one-fifth of the sample. General population, 28-market global total.

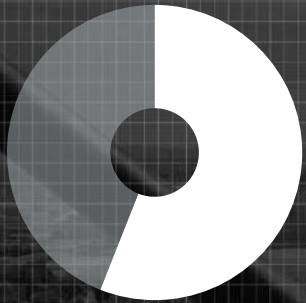


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# Every Healthcare Company Must **Act with Purpose**

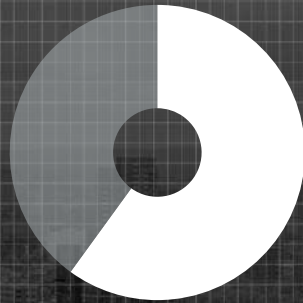
## Business Must Show Commitment to Long-Term

Percent who agree that ...



**56%**

**Companies that only think about themselves and their profits are bound to fail**



**60%**

**CEOs are driven more by greed than a desire to make a positive difference in the world**



**80%**

**Agree Pharmaceutical Industry Puts Profit Ahead of People**

Source: 2018 Edelman Trust Barometer. TMA\_SIE\_SHV. Please indicate how much you agree or disagree with the following statements. (Top 4 Box, Agree), question asked of half of the sample. CEO\_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top4 Box, Agree), question asked of half of the sample. 2017 Edelman Trust Barometer. Q667-670. For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree), question asked of one-fifth of the sample General population, 28-market global total.

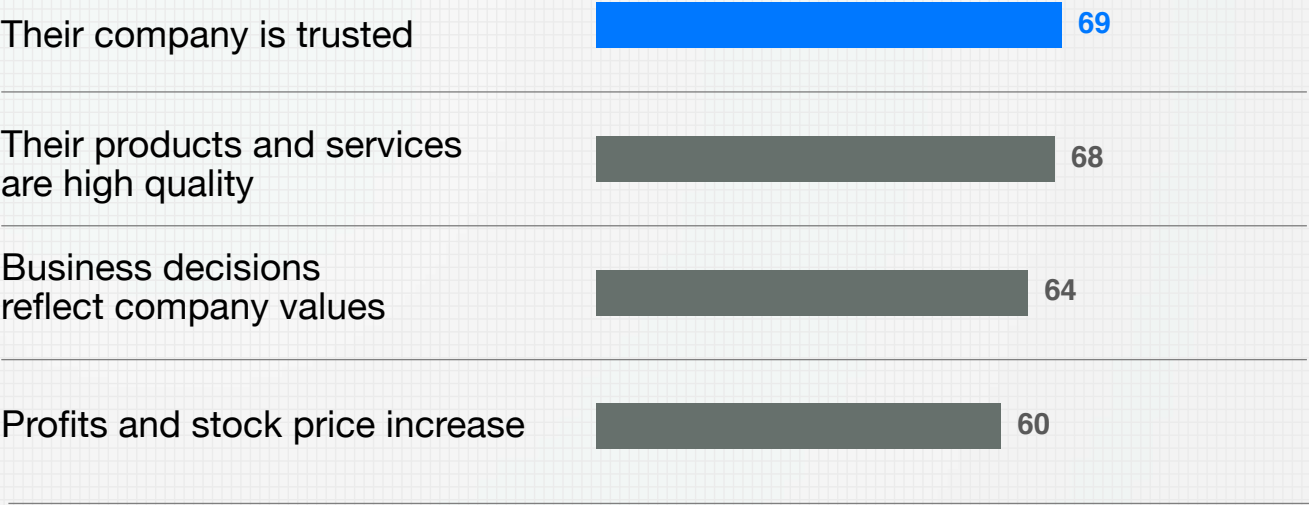
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Every Healthcare Company Must

**Embrace that Healthcare is Local**



# One Size Does Not Fit All: Blame for High Healthcare Cost Varied Around the Globe

## Government Insurance

Brazil  
Spain  
Turkey  
China  
Poland

## Hospitals

India  
Indonesia  
Malaysia  
South Korea  
UAE

## Pharma

Argentina  
Canada  
France  
Germany  
Hong Kong  
Ireland  
Italy  
Mexico  
Singapore  
South Africa  
Sweden  
The Netherlands  
UK  
U.S.

## Middlemen

Colombia  
Russia

Source: 2018 Edelman Trust Barometer. DRV\_HEA\_HCH. Which of the following is most responsible for the high cost of healthcare? Question asked of one-fifth of the sample. General population, 28-market global total.

# Every Healthcare Company Must

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- 1 Be your own publisher
  - 2 Activate the chorus to tell the story
  - 3 Move beyond the transaction
  - 4 Be the lab, not the sales force
  - 5 Act with purpose
  - 6 Embrace that healthcare is local
-