

2018 Edelman Trust Barometer

Methodology

Online survey in 28 markets

18 years of data

33,000+ respondents total

All fieldwork was conducted between October 28 and November 20, 2017



Special Report: Trust in Indian Business – A Global Perspective

2,000 respondents in India, and 1,000 respondents in each of 6 markets: **Brazil, China, S. Korea, UAE, the U.K. and the U.S.**

All fieldwork was conducted online between October 11 and October 22, 2018

Trust in Brand India survey margin of error: 6-market average +/- 1.3% (N=6,000), market-specific data +/- 3.1% (N=1,000).

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



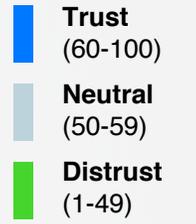
India Among Most Trusting Markets Globally

Average trust in institutions, general population

Global Trust Index at distruster level

20 of 28 markets are distrusters

Source: 2018 Edelman Trust Barometer. The Trust Index is an average of a market's trust in the institutions of government, business, media and NGOs. General population, 28-market global total.



Percent trust in each institution, India

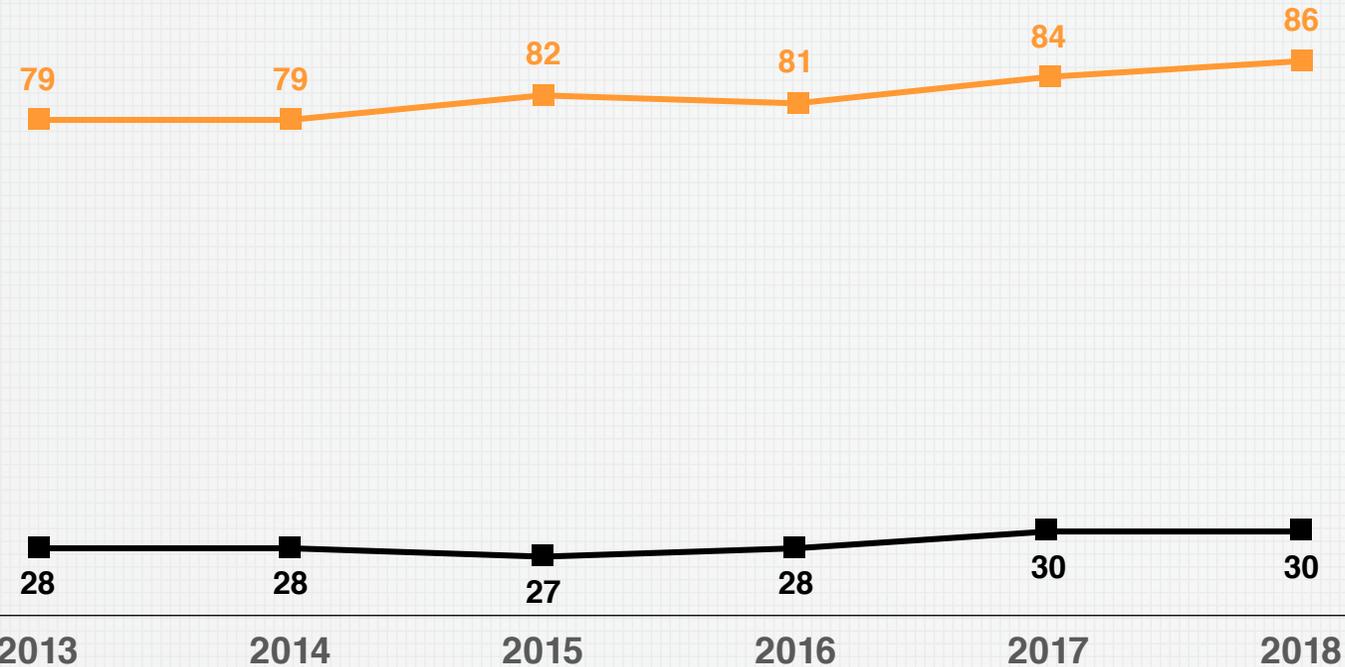
Business	74	Business trusted the most in India
Government	70	
NGOs	68	
Media	61	

The image features the Indian national flag (Tiranga) waving on a flagpole against a dark grey background. The flag is partially obscured by a series of wavy, overlapping lines in blue and white that sweep across the frame from left to right. The text is centered over the flag and the wavy lines.

Trust in Indian Business— A Global View

Trust in Indian Companies Rising at Home, Not Yet Improving Abroad

Trust in companies headquartered in India, among Indian respondents vs. respondents outside India



+7 pts

+2 pts

- India trust in Indian companies
- 24-market global average trust in Indian companies

● - 0 + Change, 2013 to 2018

6-year trend in top export markets

U.S.	+5
UAE	+14
China	-1
U.K.	+2
Germany	-3

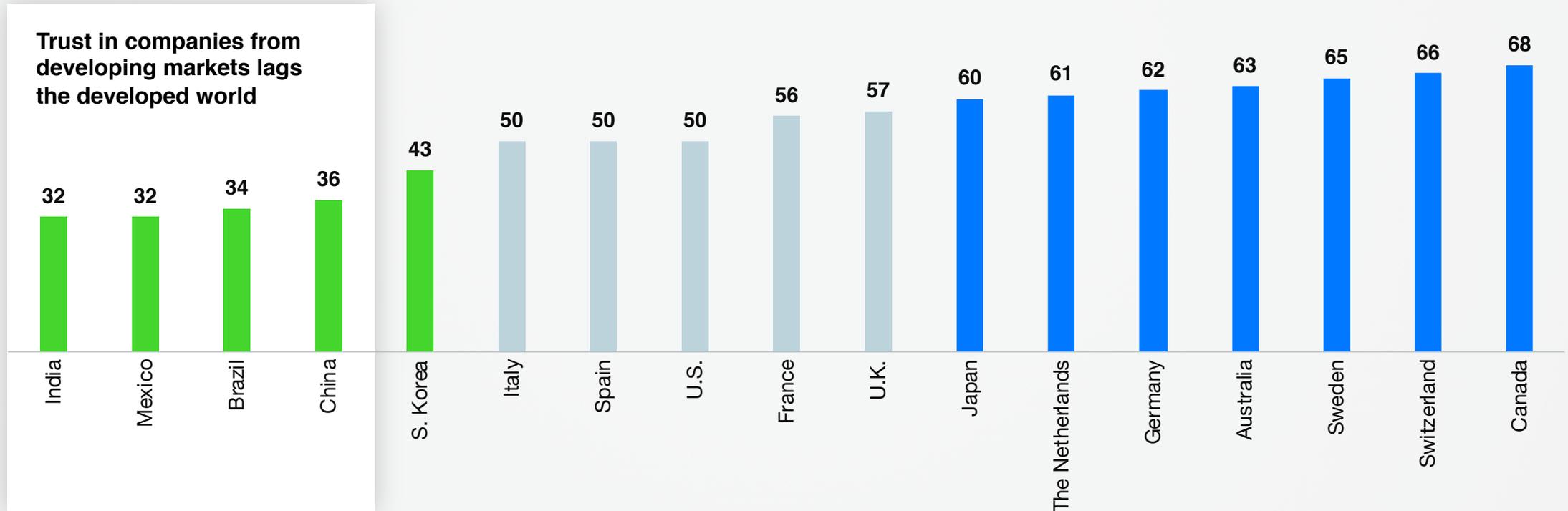
Source: 2018 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust, countries shown to half of the sample. General population, 24-market global average and India.

*The 24-market global average excludes India.

Companies From All Developing Markets Share Trust Challenge

■ Distrust ■ Neutral ■ Trust

Percent trust in companies headquartered in each country



Source: 2018 Edelman Trust Barometer. TRU_NAT. 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 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), markets shown to half of the sample. General Population, 28-market global total.

Brand India Competitive With Brand China on Key Attributes

Attributes of Indian and Chinese companies, comparing ratings from the three markets (U.S., U.K. and Brazil) surveyed in both studies

Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India, Brand China. Q2. Please rate global companies headquartered in [INSERT COUNTRY] on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, India and China.

Percentage point difference
between average scores for
Brand India and Brand China

Work to protect and improve the environment	+3	Brand India leads
Treat employees well	+2	Statistically tied
Encourage interactions with the public	+1	
Have transparent and open business practices	+1	
Invite the public to help shape their products	+1	
Pay their workers fairly	+1	
CEOs are leaders beyond their business	+1	
Positively impact communities in which they operate	0	
Have ethical business practices	0	
Pay their fair share of taxes	0	
The profits they make here stay in this country	-1	
Have a public image or heritage I can relate to	-1	
Respect our country, traditions and people	-1	
Offer high quality products or services	-2	
Listen to customer needs and feedback	-4	Brand China leads
Products / services are a good value for the money	-5	
Train employees	-5	
Understand what products / services people want	-6	
Create many new jobs	-7	
Innovators of new products, services or ideas	-11	

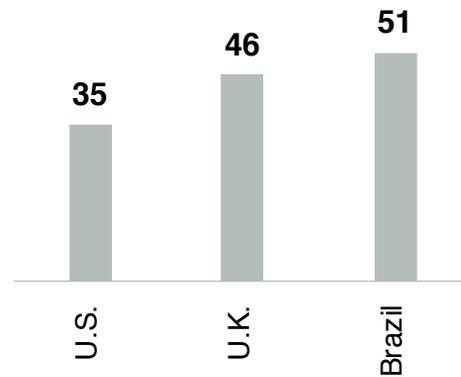
More Support for India's Growth Than China's

Percent who agree, comparing the three markets surveyed in both studies

If this country's power and influence keeps growing it will be **good for world peace and global economic stability**

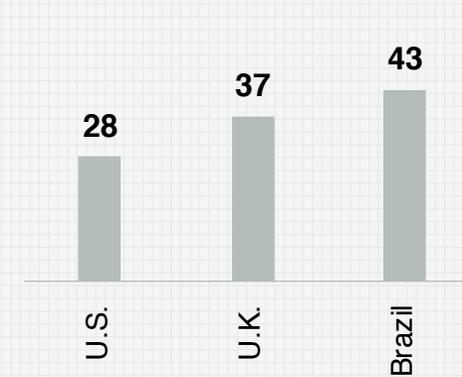
Trust Barometer Special Report:
Brand India

44% 3-market average



Trust Barometer Special Report:
Brand China

36% 3-market average



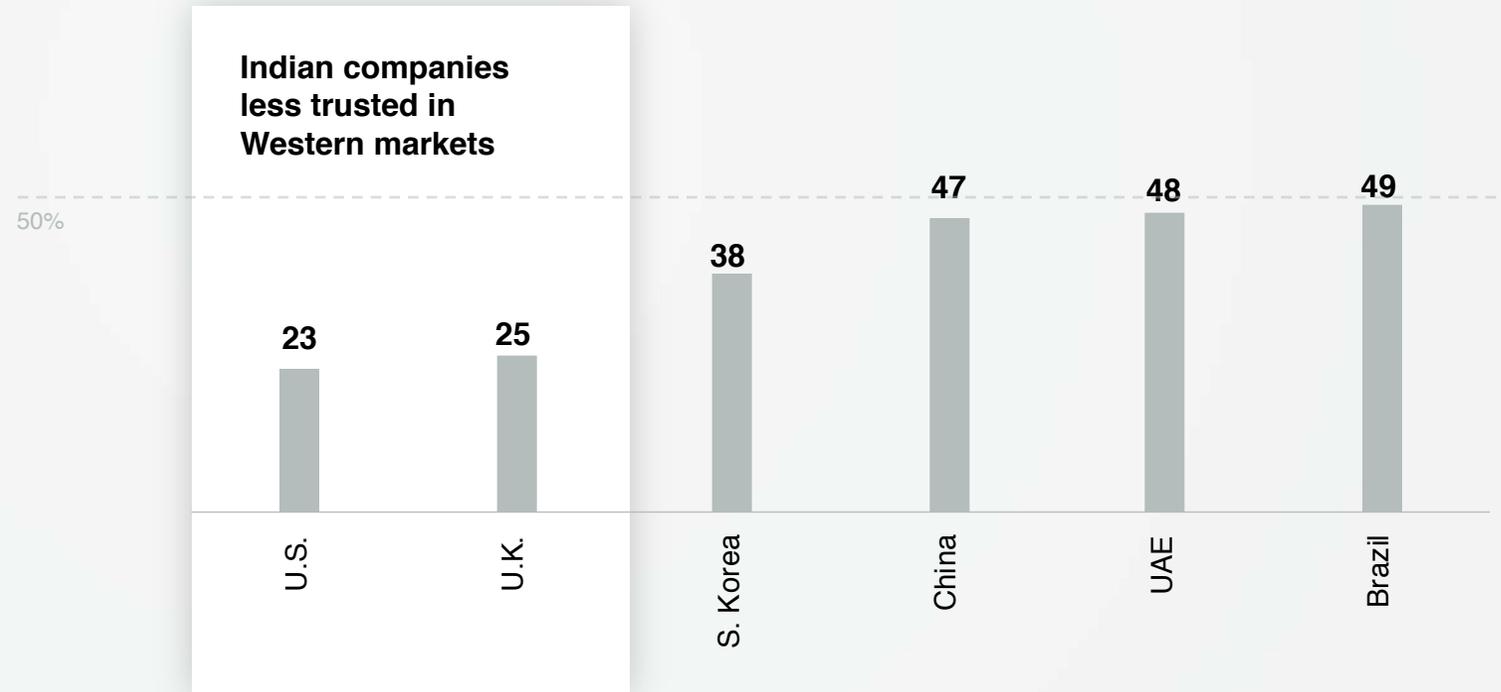
Source: 2018 Edelman Trust Barometer: Special Reports: Trust in Brand India and Brand China. Q9. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. General population, 3-market average.

Indian Companies Face Greatest Trust Challenges in Western Markets

Percent in each market who trust global companies headquartered in India

38%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q1. We would like you 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 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”. 9-point scale; top 4 box, trust. General population, 6-market global average.

The Power of Indian Business



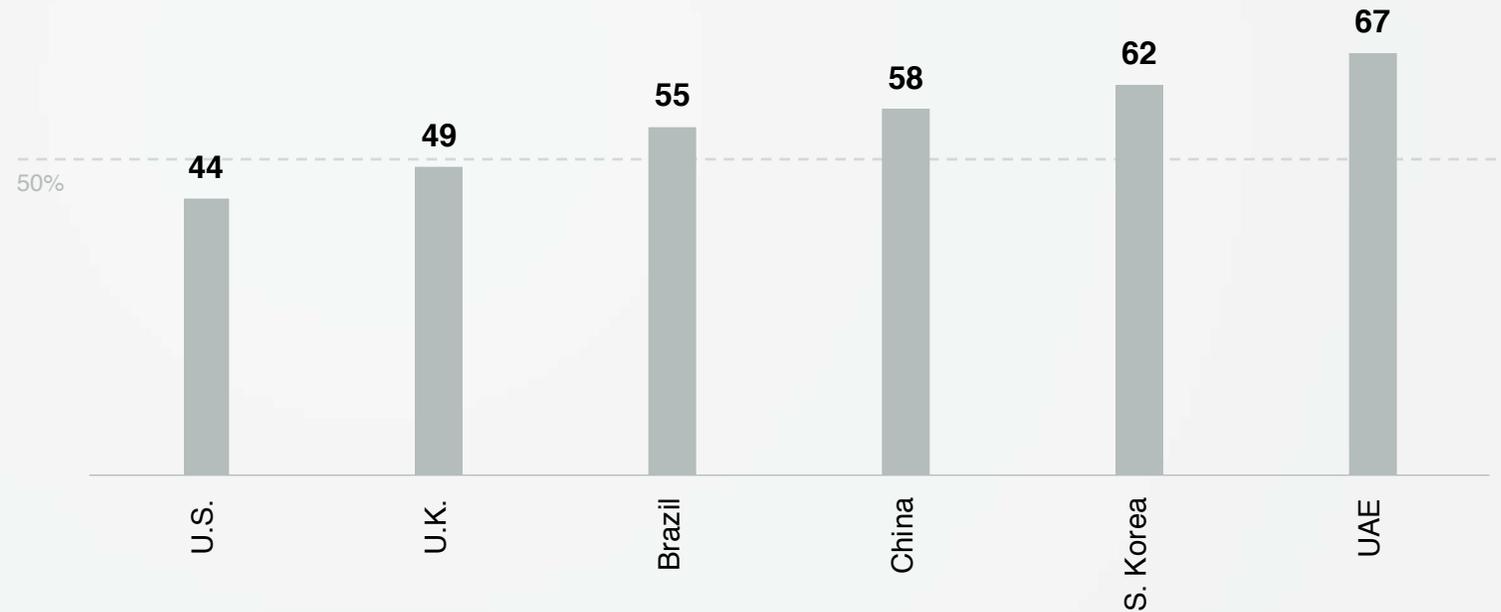
Indians Seen as Well-Educated

Percent who agree

Indian engineers, programmers
and scientists are **among the
best educated in the world**

56%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q9. 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”. 9-point scale; top 4 box, agree. General population, 6-market global average.

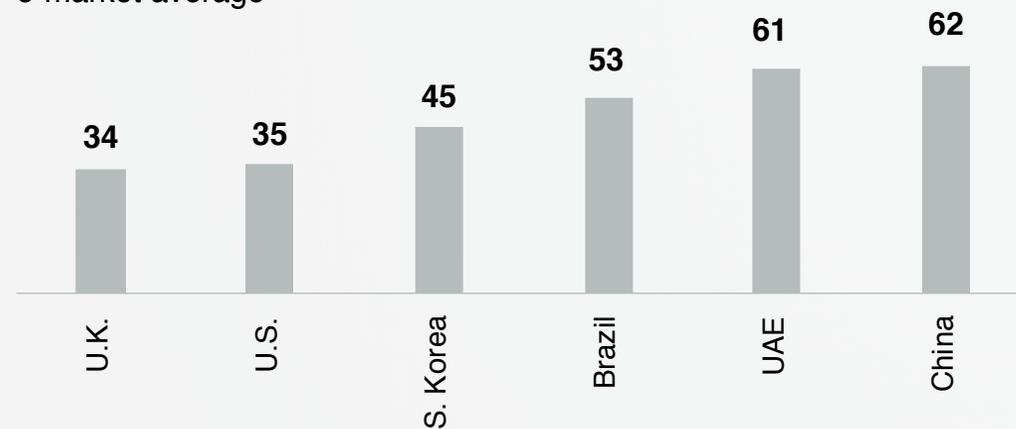
Indian Engineering and Innovation Recognized

Percent who say companies headquartered in India are performing well on this attribute

Innovators of new products, services or ideas

48%

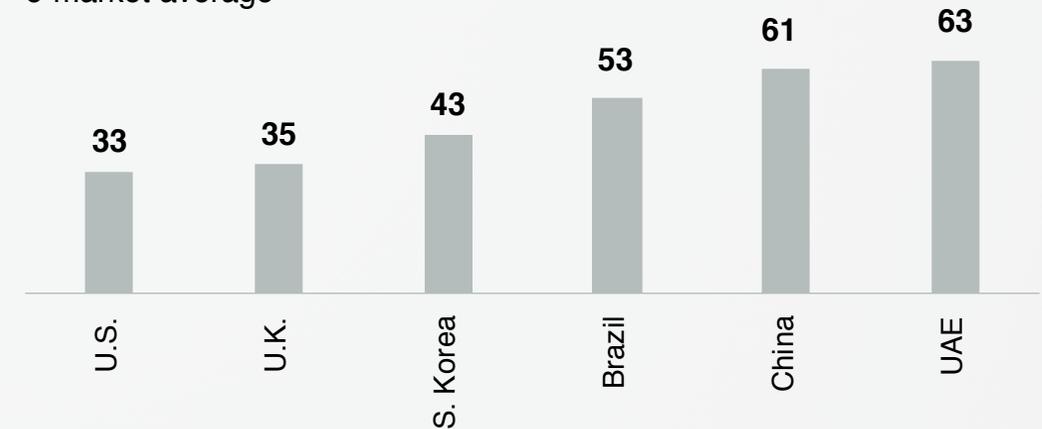
6-market average



Products well-engineered

48%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market global average.

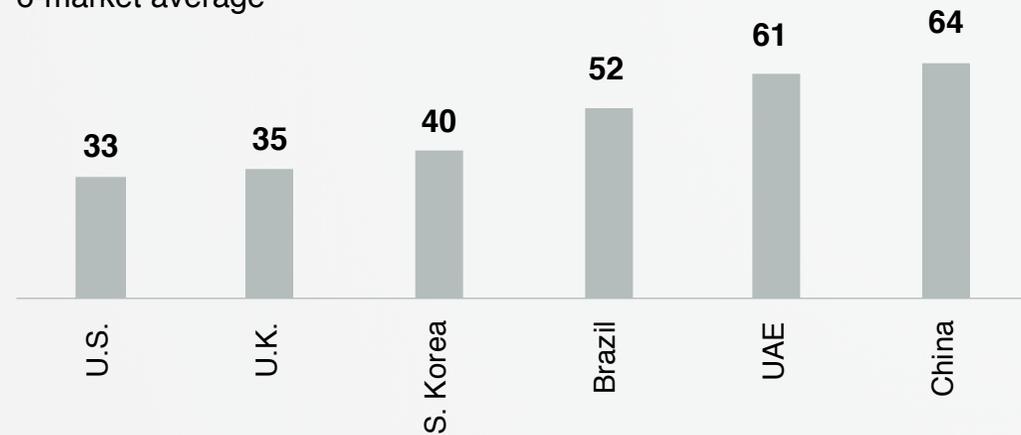
Indian Quality and Value Recognized

Percent who say companies headquartered in India are performing well on this attribute

High quality products or services

47%

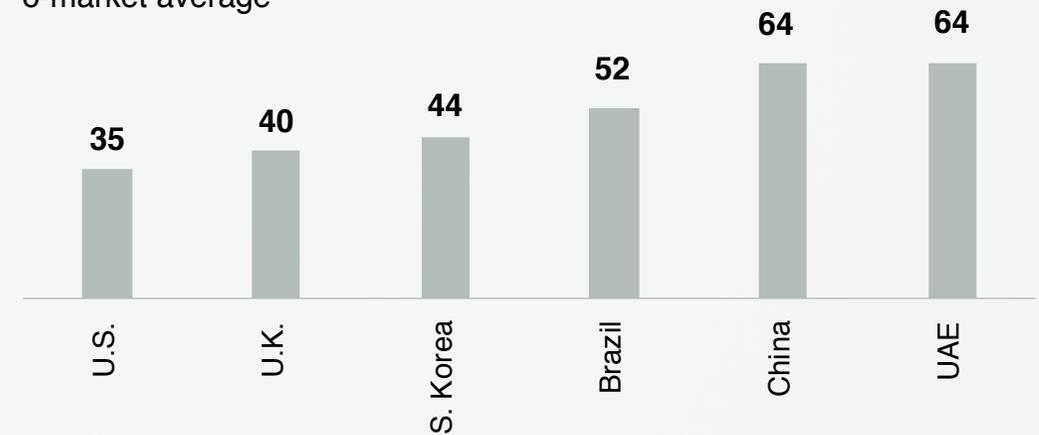
6-market average



Good value for the money

50%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market global average.

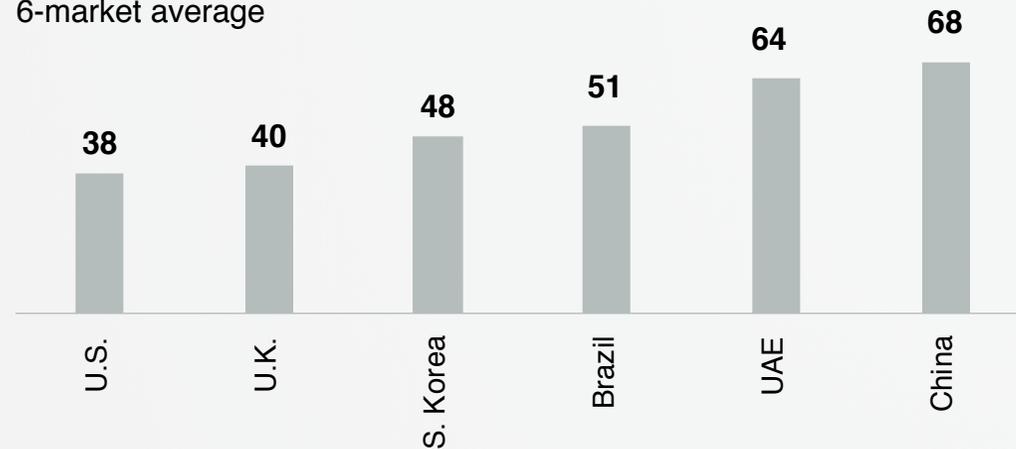
Indian Companies Seen as Creating Opportunity

Percent in each market who say companies headquartered in India are performing well on this attribute

Create many new jobs

52%

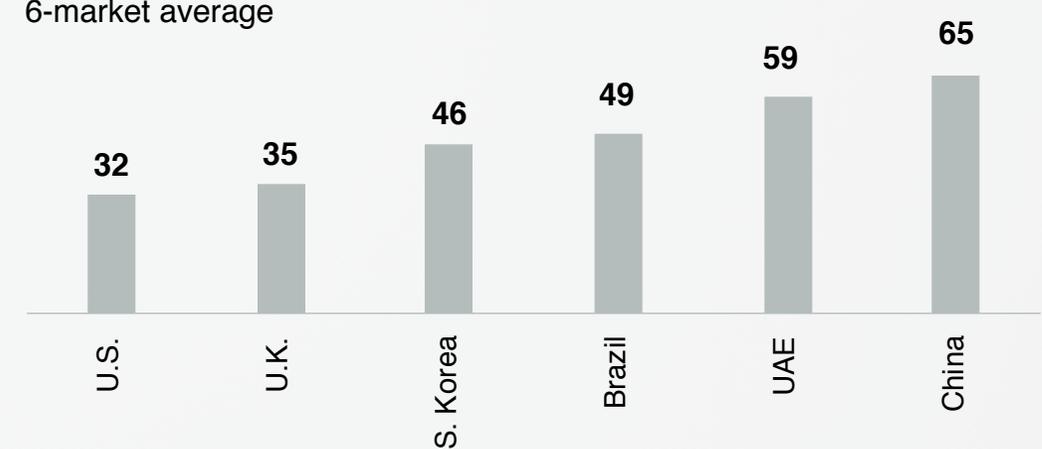
6-market average



Train their employees

48%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market global average.



Unlocking the Potential of Indian Business

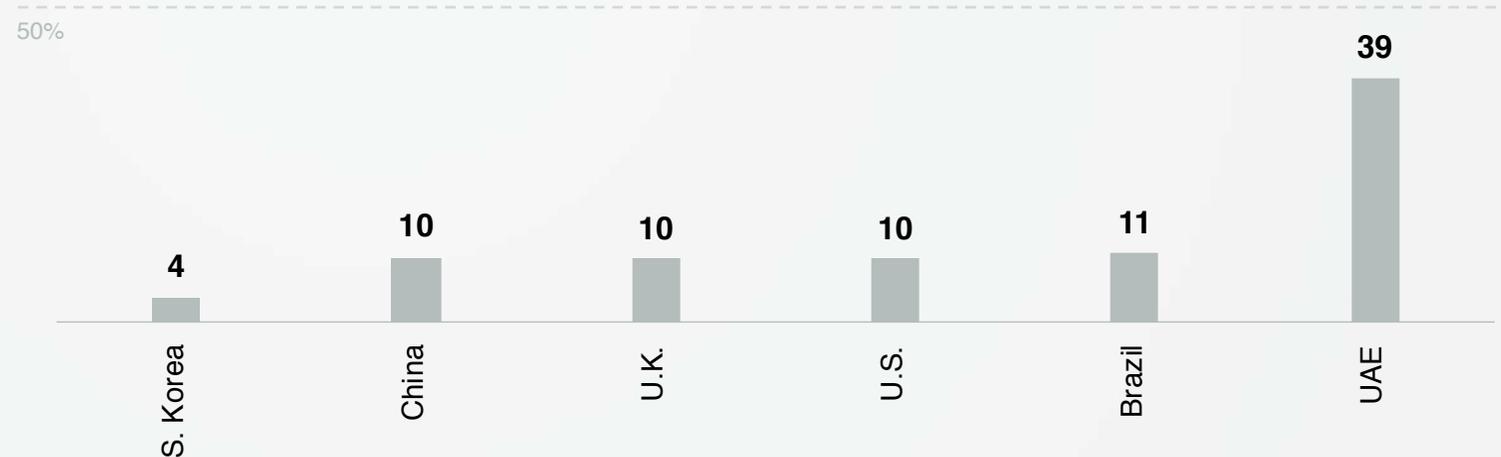
Low Awareness of Indian Companies Abroad

Percent who said

I have definitely used a product or service from an Indian company in the last 12 months

14%

6-market average



Source: 2018 Edelman Trust Barometer Special Report: Trust in Brand India. Q6. Thinking back over the past 12 months, has the following happened? Please indicate your answer using the five-point scale below. (Code 5, I definitely have done this). General population, 6-market global average

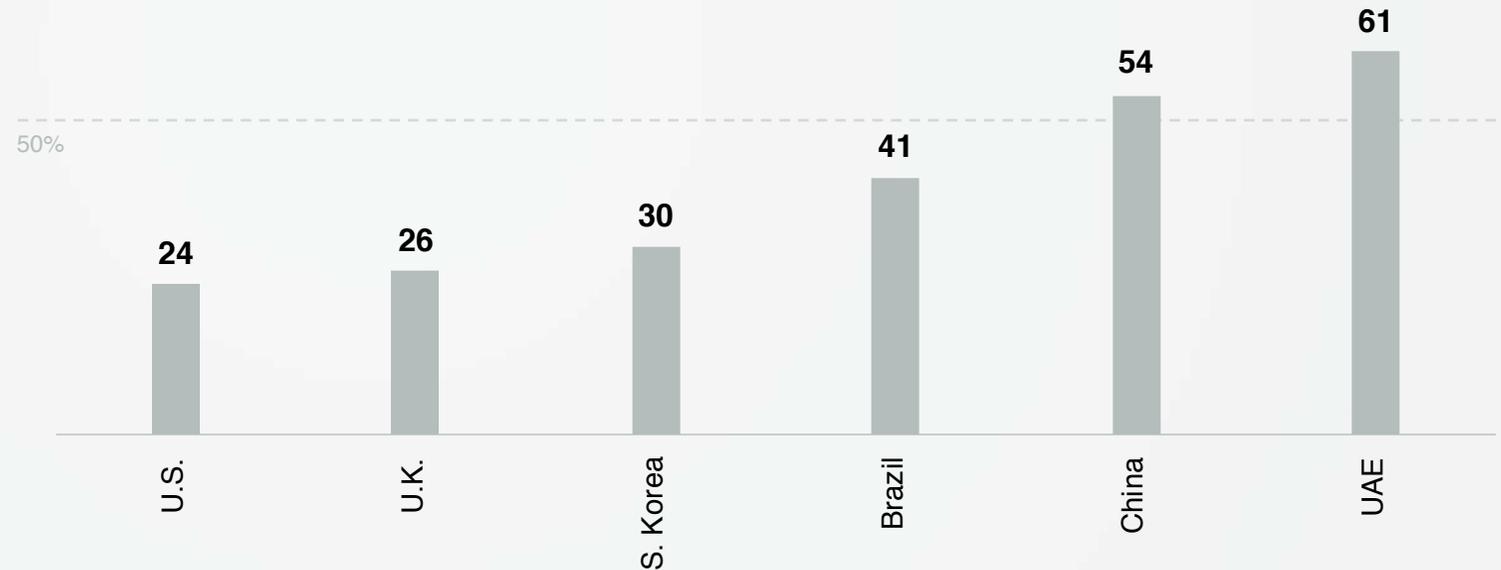
India Lacks a Well-Known Hero Brand

Percent who agree

There is at least one Indian brand that I consider to be **among the best brands in the world**

39%

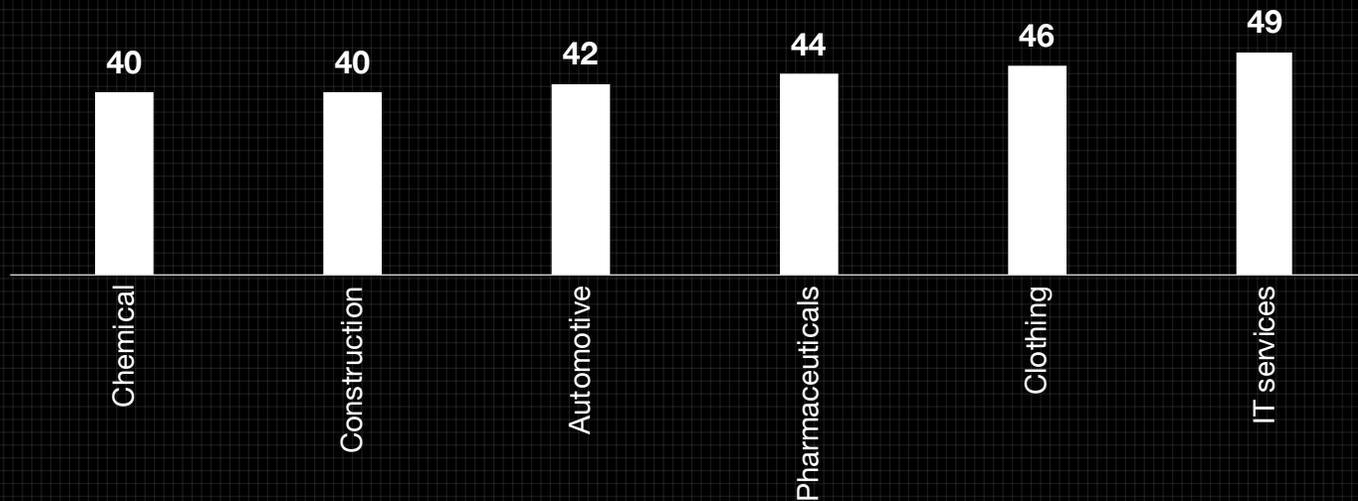
6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q3. 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". 9-point scale; top 4 box, agree. General population, 6-market global average.

India Lacks a Breakthrough Industry Sector

Percent who trust Indian companies in each sector, 6-market average



Percent trust in each industry sector in general, (6-market avg.)	Trust gap
Chemical	51 (-11)
Construction	n/a
Automotive	67 (-25)
Pharmaceuticals	60 (-16)
Clothing	n/a
Technology in general	78 (-31)

Source: 2018 Trust Barometer

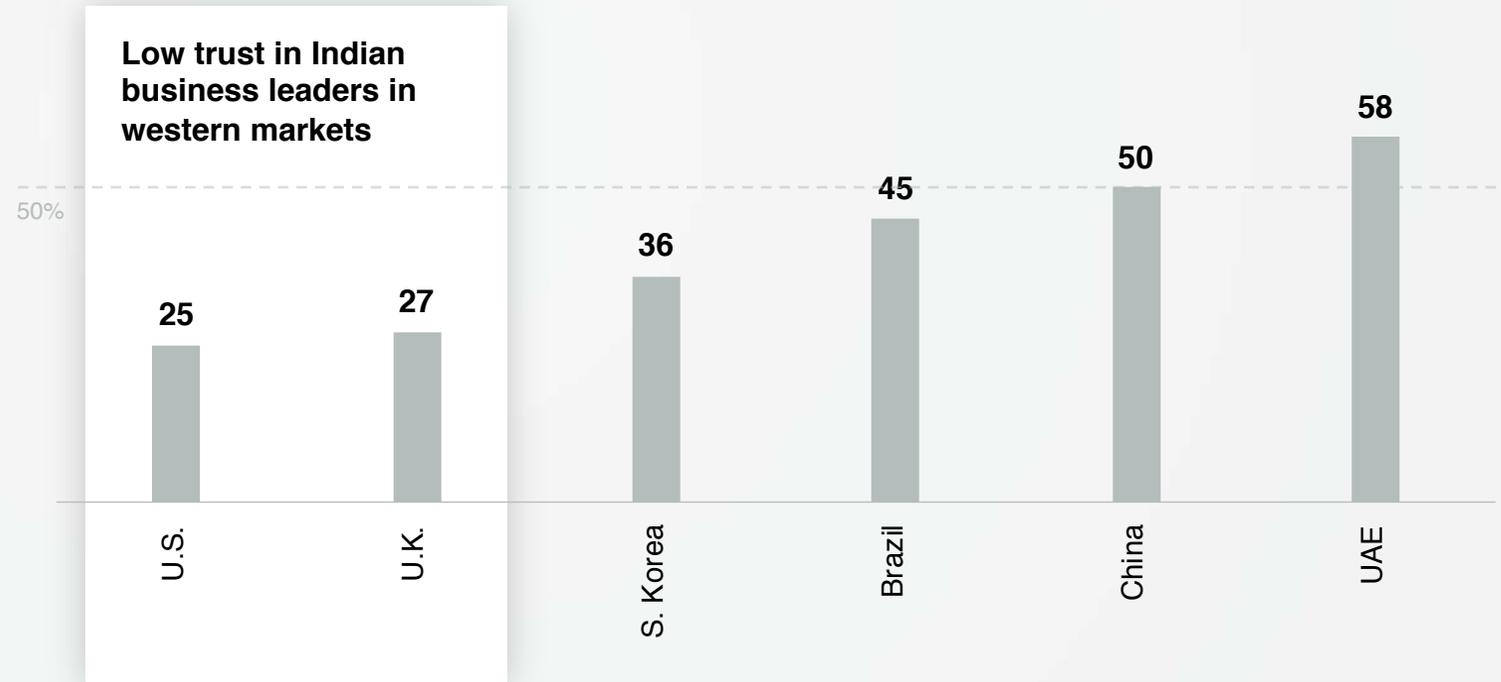
Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q1a. Please indicate how much you trust each of the following to do what is right. Again, please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. General population, 6-market global average. 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. Industries shown to half of the sample. 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. 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”. Question asked to one-fifth of the sample. TRU_SUB_ENE. Now thinking about specific sectors within the energy and manufacturing industries, please indicate how much you trust businesses in each of the following sectors to do what is right. 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”. Question asked to one-fifth of the sample. 9-point scale; top 4 box, trust. General population, 6-market global average.

Indian CEOs and Business Leadership Face a Trust Deficit in the West

Percent who trust Indian business leaders in general to do what is right

40%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. BUS_LED_IND. We would like you to think about Indian business leaders. Please indicate how much you trust the following business leaders to do what is right. Use the following nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. General population, 6-market global average.

They Don't Know What You Stand For

Percent who agree

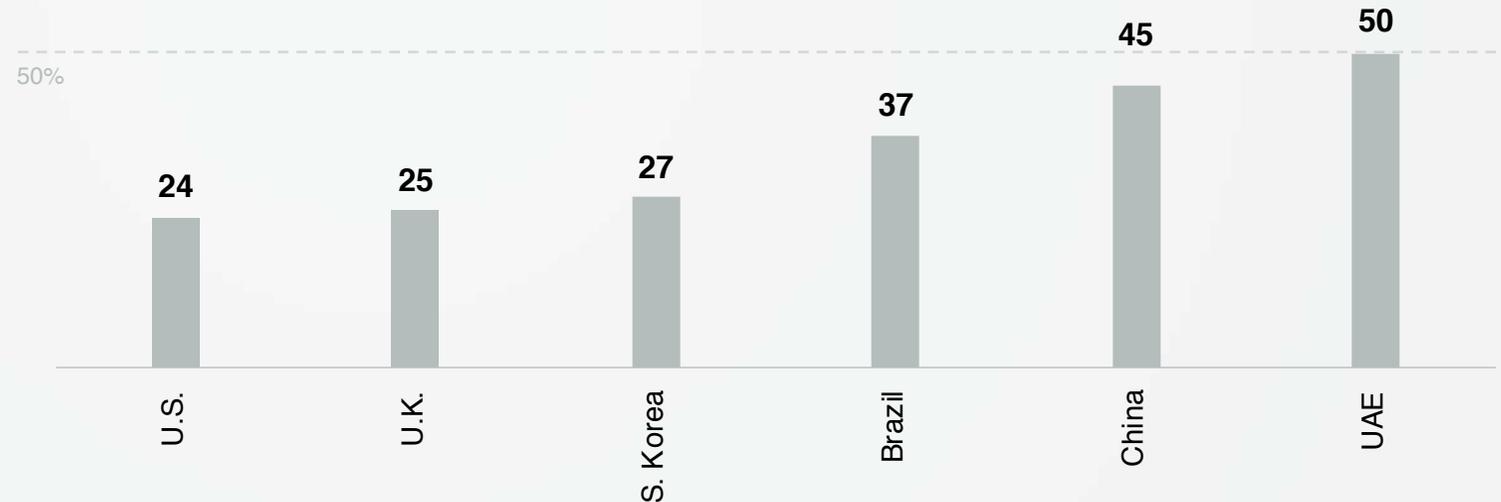
The **values and views** of most Indian companies **match my own**

34%

6-market average

2018 Edelman Earned Brand

64% choose, switch, avoid or boycott a brand based on its stand on societal issues



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q3. 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". 9-point scale; top 4 box, agree. General population, 6-market global average.

2018 Edelman Earned Brand. Belief-driven buying segments. 8-market average.

Western Markets Concerned About Treatment of Employees

Percent who say companies headquartered in India are performing well on this attribute

Indian companies **treat employees well** and pay their workers fairly

42%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market global average.

Average of “Treat employees well” and “Pay their workers fairly”.



The Opportunity for India

COVID TESTER
VAC

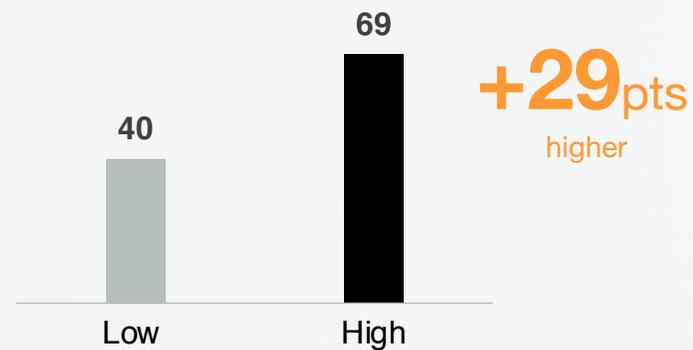
Ph. 9144-4017879
9144-4017770
S... TR...
Railway Ticket Air Ticket
Email: oms@travel...

The More They Know You, The More They Appreciate You

■ Low Familiarity ■ High Familiarity

Percent who say companies headquartered in India are performing well on each group of attributes, comparing those with low vs. high familiarity of Indian companies

Product Attributes

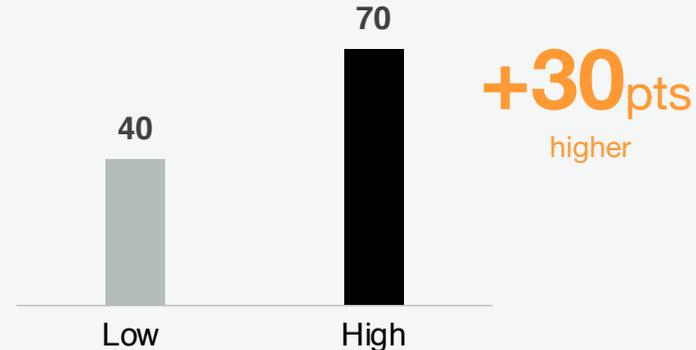


Good value for the money

Offer high quality products/services

Their products are well-engineered

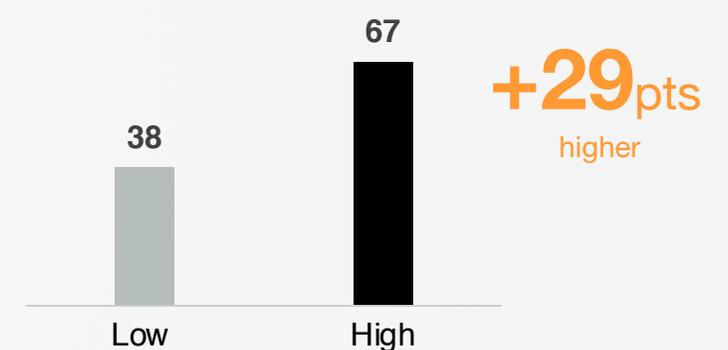
Leadership Attributes



CEOs lead beyond the business

They are run by competent managers

Engagement Attributes



Understand products/services I want

Respect our country/people

Listen to customer needs/feedback

Have a public image/heritage I can relate to

Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market global average.

Indian CEOs Must Lead Beyond the Business

Percent who say companies headquartered in India are performing well on this attribute

Indian companies' CEOs are leaders in the broader community **beyond their business**

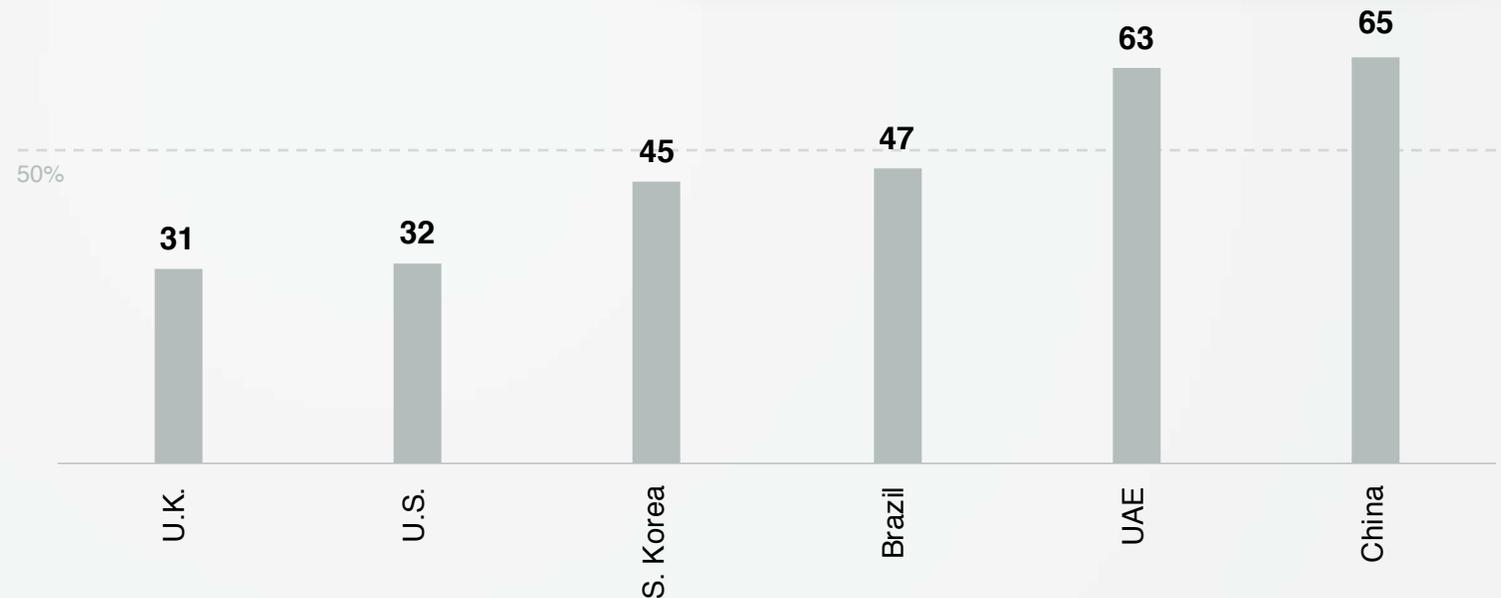
47%

6-market average

2018 Trust Barometer Global Report

64%

CEOs should take the lead on change rather than waiting for government to impose it



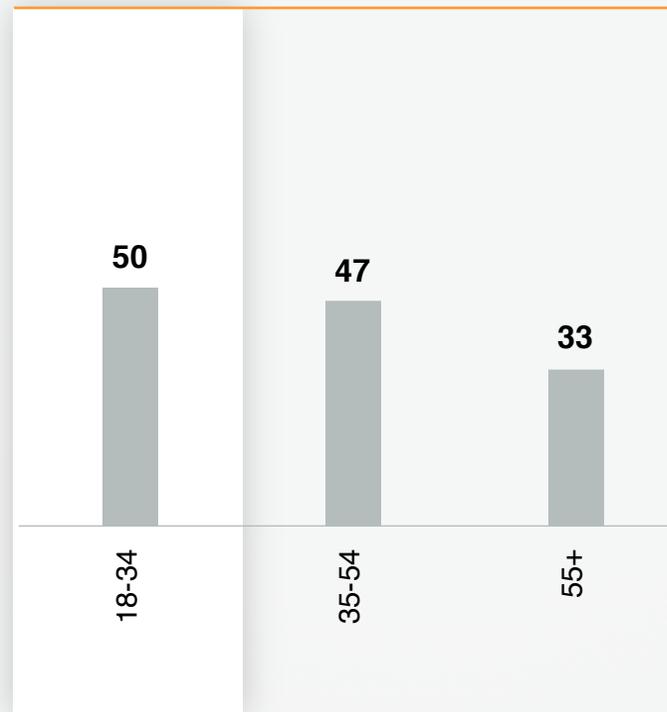
Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". 9-point scale; top 4 box, performing well. General population, 6-market global average. 2018 Edelman Trust Barometer. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? 9-point scale; top 4 box, agree, question asked of half of the sample. General population, 28-market average.

Build On Your Momentum with Affluent and Young People

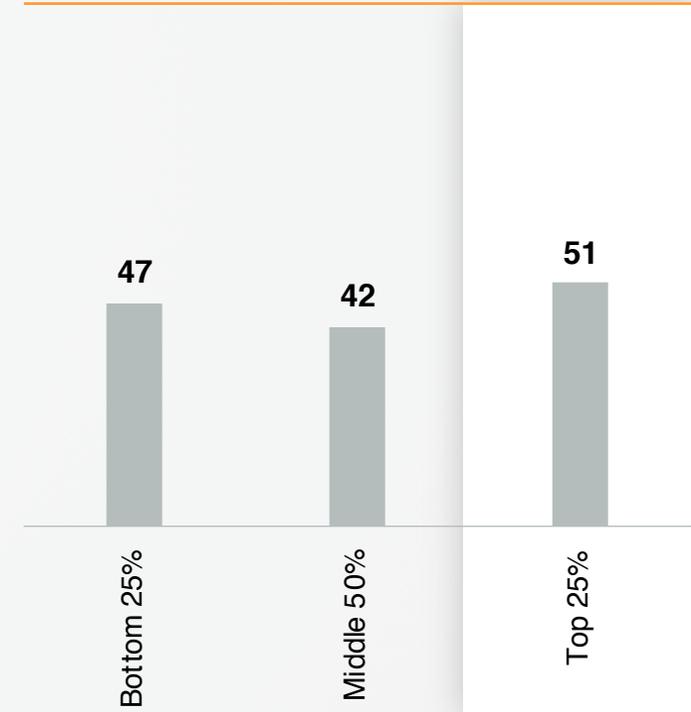
Percent who agree

My **perception of Indian companies** has significantly improved over the past few years

By Age



By Income



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q3. 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”. 9-point scale; top 4 box, agree. General population, 6-market global average, by age and income.

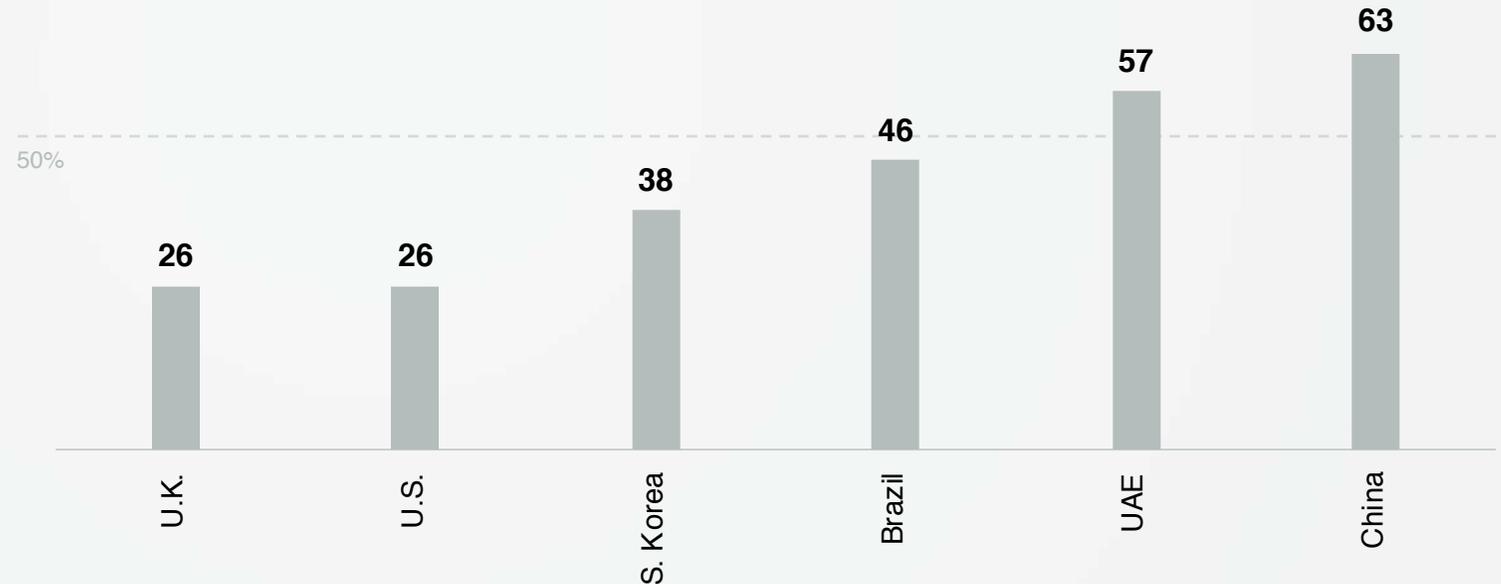
Talk With Them, Not at Them

Percent in each market who say companies headquartered in India are performing well on this attribute

Encourage interactions
with the public

43%

6-market average



Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in India on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market global average.

Take Action to Build Trust in Indian Business

Invest in yourself

Conduct business according to global standards and expectations

Invest in employees and treat them as your ambassadors

Engage with your audiences; go beyond the transaction or sale

Invest in brands

Build brand awareness by defining purpose, living by values, and taking a stand

Engage with young and affluent consumers who are more inclined to think favorably about Indian business

Invest in leadership

Company CEOs should lead from the front with a recognizable voice; be bigger than the business you lead with perspective on issues that matter to customers and employees

Summary of Attribute Ratings for Indian Companies

Percent in each market who say companies headquartered in India are performing well on this attribute, and 6-market average, ranked by the 6-market average

	6-market average	Brazil	China	S. Korea	UAE	U.K.	U.S.
Create many new jobs	52	51	68	48	64	40	38
Products and services are good value for the money	50	52	64	44	64	40	35
Understand products and services people want	49	50	62	41	63	39	36
Run by highly competent professional managers	49	51	65	45	65	35	35
Train their employees	48	49	65	46	59	35	32
Are innovators of new products services or ideas	48	53	62	45	61	34	35
Their products are well engineered	48	53	61	43	63	35	33
They get things done on time	48	49	63	42	59	39	34
Respect our country its traditions and its people	48	50	64	43	65	35	31
Offer high quality products or services	47	52	64	40	61	35	33
CEOs are leaders beyond their business	47	47	65	45	63	31	32
Listen to customer needs and feedback	45	48	64	42	60	28	30
Public image or heritage I can appreciate/relate to	44	46	61	41	61	26	27
Positively impact communities in which they operate	44	45	66	44	57	27	26
Pay their fair share of taxes	44	47	64	39	59	27	28
Have ethical business practices	43	47	63	37	57	26	27
Very careful about where they get raw materials	43	48	61	41	56	25	26
Invite the public to help shape their products services	43	45	61	41	57	27	26
Encourage and facilitate interactions with the public	43	46	63	38	57	26	26
Treat employees well	42	46	60	39	57	25	26
The profits they make in this country stay in this country	42	43	59	35	55	29	29
Have transparent and open business practices	41	45	59	36	54	26	26
Have controls/policies to uncover or prevent corruption	41	44	59	36	56	26	26
Pay their workers fairly	41	45	59	37	55	24	25
Keep their workers happy so they do not go on strike	41	45	58	36	53	28	28
Work to protect and improve the environment	41	45	59	37	57	25	24

Source: 2018 Edelman Trust Barometer: Special Report: Trust in Brand India. Q2. Please rate global companies headquartered in [INSERT COUNTRY] on how well you think they are performing in general on each of the following attributes. Use a nine-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. General population, 6-market average.