

TRUST: THE TRUTH?

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IN BRITAIN TRUST IN
SCIENTISTS, THE CIVIL
SERVICE, PROFESSORS AND
JOURNALISTS HAS RISEN IN
RECENT YEARS¹¹



FOREWORD

“There is a crisis of trust and rise of prejudice around the world. Deference is dead and everywhere the elites and mainstream media are challenged by an angry populace.”

We decided to write this report because we wanted to test if this prevailing narrative matched the data. The ‘truth about trust’ is that trust is complex, and takes many forms [many of these forms are not in crisis or decline]. Without some degree of trust society simply would not function.

That is not to say that there is not a problem – there is – but it is not new, nor is trust in terminal decline. We dissect it in detail in this report. That we are worried about it is in itself telling us something, but our concern is out of step with reality: in recent years, in many international surveys trends in social trust have been flat or rising. There has been a historic decline in trust in government since the 1960s, but it is not new or as dramatic as media coverage suggests. In the UK trust in experts has risen over the last few decades. Trust in politicians is low – but it always has been. Trust in other people has changed little in the last 20 years in both Britain and America.

TRUST IS NOT IN TERMINAL
DECLINE. WE OFTEN
TRUST EACH OTHER AS
MUCH AS WE EVER DID

The obsession with trust, the hand-wringing at Davos and elsewhere, reflects a trend we call the 'Crisis of the Elites'.¹ Unlike a crisis in trust, it is fair to say that elites do feel under more scrutiny than ever. They are attacked by populists all over the world – even when the populist politicians are often from the elite themselves.

Trying to be dispassionate, and empirical, and reviewing all the time series we can find, this report highlights that trust does not appear to be in terminal decline but is often lower than half a century ago. We find that a much more nuanced conversation has to be had – less about trust per se, and more about what organisations and individuals need to do to be 'trustworthy' in a particular context. There is a lot of painstaking work to be done, but trust can be rebuilt.



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Trust: the Truth?

IN 2017, NEARLY HALF OF
EUROPEANS [46%] SAID THEY
DID NOT TRUST THE INTERNET,
COMPARED WITH THE 38%
WHO SAID THEY DID TRUST IT^{III}



Introduction

TRUST

INTRODUCTION

Is trust in crisis, or is it just complicated?

GIDEON SKINNER

Research Director

You don't have to look very hard to see media stories about trust being in crisis. This obsession with 'trust' among politicians, business leaders and the media is in part triggered by recent so-called 'populist' revolts against elites around the world. But when you look at the data in detail, it paints a much more complex picture that suggests sweeping statements like this need to be taken with a pinch of salt – especially when you combine it with a more sophisticated understanding of what 'trust' really means, as discussed elsewhere in this report.

The purpose of this report is to take a look at what the survey data on public attitudes to trust from around the world actually shows. For a topic as huge as trust, that has so many implications across the personal, public and private spheres, we are not going to pretend that it can be reduced to a single simple soundbite, nor that what happens in one country or for one type of trust holds true for all others.

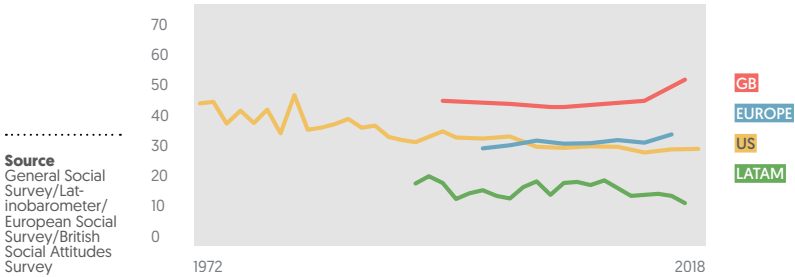
WE BELIEVE THAT THE FIRST STAGE OF UNDERSTANDING WHAT IS HAPPENING WITH TRUST, AND HOW WE MIGHT IMPROVE IT IN THE FUTURE, STARTS WITH AN OPEN-MINDED LOOK AT WHAT THE EVIDENCE REALLY SHOWS

Instead, we believe that the first stage of understanding what is happening with trust, and how we might improve it in the future, starts with an open-minded look at what the evidence really shows, rather than with some of the myths that have developed over the years. The rest of this report goes into this evidence in more detail, but what are some of the overall conclusions?

Trust is low in many arenas, and often has been for years. Low levels of trust seem to be a chronic issue, rather than a very new acute one.

Looking at the absolute levels of trust around the world shows there is little room for complacency. It is rare that the majority of the population in any country thinks that most of their fellow citizens can be trusted, and in many countries, it is significantly less than that. There are also low levels of trust in many of the key institutions that society relies on – especially those of government and politics, the media, big business and more.

At the same time, low levels of trust are not new. The respected British Social Attitudes Survey (BSA) shows that trust in others in the UK has changed little over the last twenty years, and going even further back, the General Social Survey (GSS) in the United States found even in the early-1970s only a minority felt that most people could be trusted – and it has been falling steadily since then, not just recently. Data from Pew suggests that a majority of Americans

DIFFERENT TRENDS IN TRUST IN OTHERS AROUND THE WORLD...**% who say that most people can be trusted (or variant of)**

said they trusted the government in Washington most of the time in the 1950s and 1960s, but this had disappeared by the mid-1970s. Even during the Second World War, a famous Gallup study found that only a minority of Britons felt that politicians were doing their best for the country (though it has dropped even further since then). Furthermore, as we discuss in more detail below, there are wide variations in levels of trust between different countries, different institutions and different groups of people.

This suggests that, on the one hand, talk of a worldwide crisis in trust as a new phenomenon is misplaced; low levels of trust are not new, and indeed there are plenty of examples of rising trust that can be found. But on the other hand, just because it is not new, it does not mean there is nothing to be worried about. To take the analogy further, if trust is a chronic issue rather than an acute one, it implies that it has been developing over the long term, and may have multiple causes rather than a single, simple diagnosis. It might also reduce society's resilience against other sicknesses.

Very few people think trust has been rising over the last twenty years

Nevertheless, the perception of large numbers of people around the world is that trust has been falling over the last twenty years or so, as shown in the chart overleaf. Perceptions that trust is in decline are particularly high for the institutions we see with some of

PEOPLE ARE MUCH MORE LIKELY TO THINK TRUST HAS
FALLEN OVER THE LAST TWENTY YEARS THAN INCREASED

Over the last twenty years or so, do you think the proportion of
people in [COUNTRY] who say they trust each of the following
has increased, decreased, or stayed about the same?

% global average across 24 countries

THINK FEWER PEOPLE ABOUT THE SAME DON'T KNOW THINK MORE PEOPLE
TRUST THEM TRUST THEM

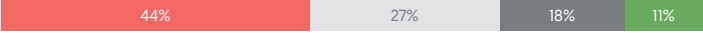
The government



The press



Major companies



Other people



Source
Ipsos Global
Advisor

Base
17,022 online
adults aged
16-74 across 24
countries
October 2018

the lowest levels of absolute trust – the government and the press
– but even for our trust in others, slightly more think it has fallen
than stayed the same, and very few think trust has actually risen.

In some cases this will simply reflect reality, but in other countries
where survey data suggests trust is stable [or even sometimes
showing signs of improvement], this may reflect our negativity bias
that we see in much of our other perceptions work. It can be both
fed by, and feed into, media stories of trust in crisis. For example,
around four in ten in the US believe that levels of trust in others have
fallen in the last twenty years, which reflects a real (though small) fall
in the trends there over that time. But four in ten Swedes also believe
trust has fallen – when in fact it has stayed at a relatively high level
over that time, as do four in ten in Brazil [where trust has stayed at the
same low level over that period]. And four in ten Brits also believe
that trust in others has been falling – where if anything the trend is

IN MANY COUNTRIES, PERCEPTIONS ARE OUT OF LINE WITH REALITY

COUNTRY	FEWER PEOPLE TRUST OTHERS	TRUST ABOUT THE SAME	MORE PEOPLE TRUST OTHERS	ACTUAL CHANGE
Over a third in these countries correctly believe trust in others is falling...				
US	41%	37%	6%	2000 › 2018 35% › 31%
Mexico	34%	28%	17%	2000 › 2018 34% › 19%
But as many in these countries also believe trust in others is falling when it is stable or improving ...				
Brazil	43%	27%	8%	2000 › 2018 4% › 4%
Sweden	43%	33%	4%	2002 › 2016 52% › 51%
Italy	41%	25%	6%	2002 › 2016 20% › 21%
GB	40%	35%	5%	1998 › 2017 47% › 54%
Belgium	34%	29%	8%	2002 › 2016 26% › 33%
Germany	32%	30%	6%	2002 › 2016 23% › 33%

Source
GSS, Latinobarometer, ESS,
BSA, Ipsos
Global Advisor

slightly up. There have also been rises in trust in others in Germany and Belgium since the early 2000s, but fewer than one in ten in those countries think that trust is rising.

Perceptions that trust in governments is falling are even stronger. Again, in several countries this reflects what survey data is showing – between around six and seven in ten in the US, France, Spain, Italy, Chile and Brazil all believe that fewer people trust the government than did twenty years ago, all of which is in line with trends in survey data in those countries.

But people in countries that have seen little change in trust in government, or even improvements in some European countries,

**IS THERE A CRISIS OF CONFIDENCE IN
INSTITUTIONS BECAUSE TRUST IS FALLING,
OR IS TRUST FALLING BECAUSE
INSTITUTIONS ARE NOT SEEN TO BE
DELIVERING FOR THEIR CITIZENS?**

don't seem to recognise this. So again, almost just as many (around six in ten) in Sweden and Germany believe that trust in government is falling – but in those countries, measures of trust in government are, if anything, higher now than they were roughly twenty years ago.²

A crisis in confidence?

Much of the data looking at trust in key institutions is phrased as “confidence”, itself instructive in showing how people frame this issue. In the US, according to the General Social Survey (GSS), confidence in a whole range of institutions is at record lows. This applies to institutions of government (confidence in Congress fell from 24% in 1973 to 6% in 2018; in the federal executive from 29% to 12%), private sector companies (confidence in banks fell from 32% in 1975 to 19% in 2018; in major companies from 31% in 1973 to 20% in 2018), and other parts of the public sphere (confidence in education fell from 37% in 1973 to 25% in 2018; in organised religion from 36% to 21%).

Again, though, there are signs that this is a long-standing, chronic issue – confidence was never very high in any of them, and has been falling since the 1970s, not just in the last few years – and some institutions, such as the military, buck the trend. Perhaps just as importantly, it is not clear in which direction the causality lies. Is there a crisis of confidence in institutions because trust is falling, or is trust falling because institutions are not seen to be delivering for their citizens? This would reflect the strong ‘system is broken’

sentiment that we see at Ipsos through our global polling. Even if trust is falling, which particular aspect of trust is to blame? Simply bemoaning low levels of such a large and multifaceted issue as trust does not pinpoint what actions to take to improve it.

The trends in confidence in European countries are less clear cut and show a similarly mixed picture. According to the European Values Study (EVS), between the 1981/84 and 2008/10 waves, on average confidence fell for churches, but for many other institutions, such as parliament, the press, and major companies, confidence was little changed over those twenty years, and for several others (such as the army, education, civil service and labour unions) confidence actually *increased* (although this hides variation by country). The latest results of the EVS are yet to be published, which will tell us whether confidence in civil institutions in Europe has been affected by the last decade or so of austerity, but evidence from other surveys – such as the European Social Survey and Eurobarometer – suggests that the trend in Europe at least is slightly less negative than elsewhere.

There is some limited evidence that confidence is improving in the last couple of years. Ipsos measured public confidence in seven institutions in 21 countries around the world in 2016 and 2018: international institutions, governments, banks, the media, big companies, the justice system and political parties. On average, confidence remains low for all of them – especially the media, government, and political parties – and had only changed marginally over the two years. However, that does hide a small number of more positive country changes – notably in Spain, Germany and Mexico. We can also detect surges in confidence in government with new leaders such as Trudeau, Modi and Macron – or at least when they were new.

Continents apart

This brings us to one of the clearest findings when looking at the data on public opinion on trust: you can't take a one-size-fits-all approach to different countries around the world. There are differences in question wording, approach, and fieldwork dates, so we have to caveat the comparisons to some extent. But nevertheless, the trends look very different – and not just on the confidence questions quoted previously. Take social trust

Introduction

[i.e. trust in other people], for example. It's not just the US where social trust looks to have fallen – there are also falls in many Latin American countries, in India and some African countries too [taking an overview of data from the World Values Survey and Latinobarometer]. But there are also countries where trust seems to be rising, and not just in Europe – rises have been recorded in Australia and New Zealand, and even a small rise in China [again according to the World Values Survey].

Even within Europe itself, there are clear differences by country. Since the turn of the millennium, according to Eurobarometer and the European Social Survey, there are countries that have seen a rise in trust in institutions, and those that have seen a fall. The countries where trust is on the up tend to be richer and in the north and centre of Europe – such as Germany, Austria, Switzerland, the Netherlands, Norway and Sweden, though also including Poland and the Czech Republic. Falls in trust on the other hand are particularly noticeable in the Mediterranean countries of Spain, France and Italy, and also Romania and Slovenia.

Trust in what?

Nor is it the case that all institutions are suffering from the same levels of [mis]trust. As the Ipsos MORI Veracity Index makes clear, the public distinguishes between different professions, and a similar pattern is found when comparing trust or confidence in institutions, from surveys such as the GSS in the US, and Eurobarometer, the European Social Survey and the European Values Study in Europe. Public services, such as education, healthcare/medicine, the police and the armed forces tend to receive more positive trust ratings from the public. Institutions such as banks and major companies, government, the press and parliament all receive low scores, but the very lowest levels of trust seem to be reserved for politicians and political parties. That reflects the low opinion many people living in democracies have for the people they vote for – but again, not a finding that is particularly new or surprising. Of course, distrust of politicians does not necessarily mean we prefer autocracies or direct democracy. In the UK, every time we have asked the public if they want to replace elected politicians with professional managers the answer has been no!

TRENDS IN TRUST DON'T JUST VARY BY INSTITUTION, BUT EVEN
ACROSS NEIGHBOURING COUNTRIES

I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.

	GERMANY % TEND TO TRUST			FRANCE % TEND TO TRUST		
	2001	2018	CHANGE	2001	2018	CHANGE
Police	72	87	+15	55	76	+21
Army	61	72	+11	59	80	+21
Radio	64	71	+7	64	56	-8
Justice system	58	70	+12	41	46	+5
Television	60	63	+3	54	33	-21
National parliament	42	58	+16	35	27	-8
The press	45	57	+12	54	50	-4
National government	39	54	+15	33	26	-7
European Union	33	51	+18	41	33	-8
United Nations	40	51	+11	42	41	-1
Political parties	16	31	+15	11	6	-5

Source Eurobarometer

Indeed, there are also examples of institutions where trust has actually been rising over time. As has already been noted, according to the GSS, confidence in the military rose from 33% in 1973 to 53% in 2016, and it rose from 56% to 62% on average in countries taking part in the European Values Study in 1980/1 to 2008/10. And

there are more examples on a country-by-country basis. Even in the US, confidence levels in organised labour and the scientific community are little changed from the 1970s. In Europe, according to the European Social Survey, trust in the police rose in 14 countries between 2002 and 2016, and trust in the legal system in twelve. There are even a small number of countries, including Germany, with rises in trust in political parties, albeit from very low bases.

The press and the internet

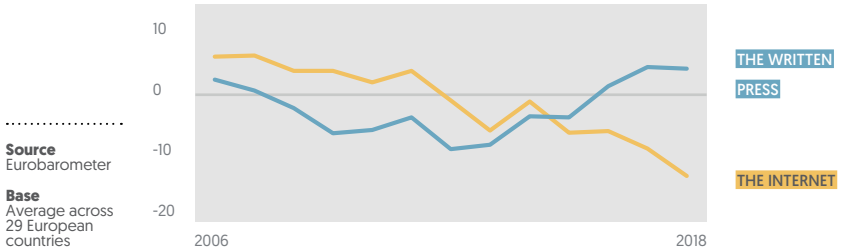
One aspect of our lives that is new, of course, is the internet and social media. Its rise and changing public opinion towards it may help to explain why there is such a strong feeling that trust is in crisis, even if that isn't always borne out by the data as a whole. One useful tracker of trust in the internet comes from Eurobarometer, which has been measuring it since 2006. On average across the 29 countries included from 2006 to 2018, trust in the internet was little changed, from 38% to 36%. However, in 2006 the proportion answering "don't know" stood at 31% – but twelve years later that figure had halved to 15%, while those not trusting the internet rose from 31% to 49%. The more Europeans saw of the internet, the more they decided they did not trust it.

It is useful to compare this with trust in the press in the same 29 countries over the same period. Unlike trust in the internet, trust in the press was little changed on average over those twelve years (although with a dip in the first six years, which then recovered), and is higher than trust in the internet, with 48% saying they trusted the press in 2018 and 44% not. The difference is starker at a country-by-country level. Twenty-two of the 29 countries measured saw a fall in trust in the internet over that time. However, of those 22, half actually saw a rise in trust in the press over the same period.

The same comparisons are not available for other countries, and not all the long-term trends for trust in the press elsewhere are as positive. For example, according to the General Social Survey in America, confidence in the press and in television in the US is lower in the 2000s than it was in previous decades, and the World Values Survey has also seen long-term falls in confidence in the press in other countries – such as Australia, Brazil, Mexico and Russia – although rises in other places such as India, Japan and South Africa.

TRUST IN THE WRITTEN PRESS VS TRUST IN INTERNET IN EUROPE

For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it?



Again, in Europe the picture is slightly different, with the European Values Study showing on average little change in confidence in the press between the 1980s/90s and 2008/10, with as many countries showing rises as falls. Nevertheless, there is more evidence to show that the internet, and social media, remains significantly less trusted as a source of information than more traditional media. According to a 2018 Eurobarometer study, over six in ten say they tend to trust the news they receive from the radio, television and printed news. But only half trusted online news, and just a quarter news from social media.

A 2016 Pew study³ in the US found that trust in information from national and local news organisations is about twice that of trust in information from social media, while research from Reuters⁴ showed that in five of seven countries, trust in digital media was lower than public service broadcasters, commercial TV or print.

There seems to be a bit of a paradox here. On the one hand trust in some traditional news outlets, and indeed in fellow citizens, seems to be holding up despite low trust in the internet and social media – which will of course involve interacting with the very same people and same media companies. This may suggest a welcome lack of naivety in our interactions online, as well as an equally welcome ability to distinguish between the sound and fury on social media and our dealings in the rest of our lives. But on the other hand, given the growth in internet usage, and the extent to which it is becoming out-of-date to talk about a

WHETHER YOU VOTED 'REMAIN' OR 'LEAVE' HAS BECOME MORE IMPORTANT TO PEOPLE'S POLITICAL IDENTITY THAN TRADITIONAL PARTY LOYALTIES

distinction between our online and offline lives, these low levels of trust should be a concern – particularly given other trends we are beginning to see of echo chambers and polarisation.

Beneath the surface – growing polarisation?

One of the drivers of the 'Age of Uncertainty' that Ipsos has described in the United States is a growth in tribalisation, and specifically a negative type of polarisation where people do not just stand up for their own views, but are increasingly antagonistic towards those with alternative views. This started before the modern age of social media – GSS⁵ data shows Democrats and Republicans becoming more polarised over abortion since the mid-1980s, for example – but it continues to get worse. According to Pew,⁶ between 1994 and 2016 the proportion of Republicans with a very unfavourable view of the Democratic Party rose from 21% to 58%, while the proportion of Democrats with a very unfavourable view of the Republican Party rose from 17% to 55%.

There are also some signs of polarisation in other countries, although the evidence is not as strong as in the US (and it is also less clear whether this is a new phenomenon or a long-term issue). Analysis by Schwarz and Draca⁷ using the World Values Survey has found the US stands out for its increase in polarisation among citizens, but nevertheless still finds 'muted' evidence for increasing polarisation and a 'disappearing centre' in some other countries.

IT COULD BE THAT LOW LEVELS OF TRUST OVER THE LONG TERM HAVE MADE US MORE SUSCEPTIBLE TO POLARISATION

The US also stands out as having the most polarised online media in a 2017 Reuters Institute analysis,⁸ where there is also evidence of polarisation in southern and central European countries such as Italy, Spain and Poland.

In the UK, analysis by Jonathan Wheatley of Oxford Brooks University⁹ has observed a growing gap between supporters of parties of the left (Labour, the Greens and the LibDems) and parties of the right (the Conservatives and UKIP) between the 2015 and 2017 general elections. The gap is not just there on issues of left- and right-wing approaches to the economy, but is growing even more on cultural/open vs closed values (such as attitudes to immigration, foreign aid and LGBT issues).

The Brexit vote has put even more emphasis on the cultural divide that it revealed, along with data showing that whether you voted 'remain' or 'leave' has become more important to people's political identity than traditional party loyalties, and this, if anything, has increased since the referendum.¹⁰ Other research has suggested it is the Remain side that is particularly insular – for example 37% of Remain voters said they would mind if one of the family married a Leave voter, but only 9% of Leavers felt the same of Remainers.¹¹ Our own analysis of Ipsos MORI's satisfaction trends with party leaders over the last 20 years also shows that the gap between Conservative and Labour supporters' views of their own party leader and those of the opposition

IS POLARISATION GROWING IN THE UK?

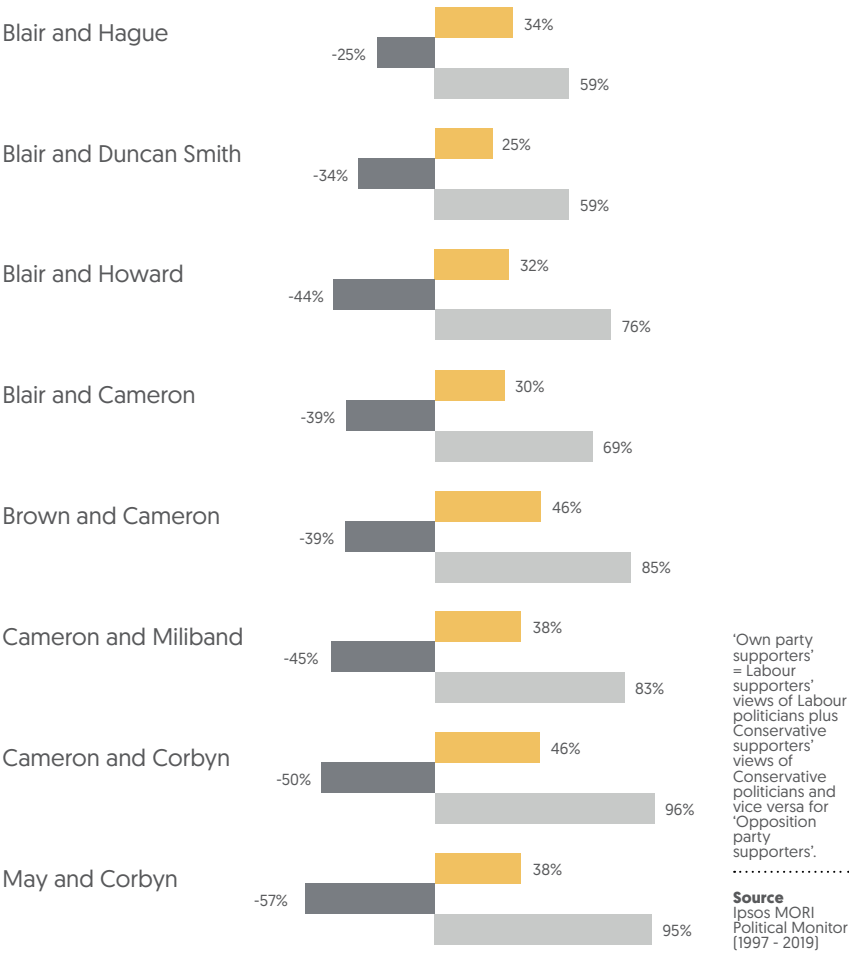
Are you satisfied or dissatisfied with the way xxx is doing his/her job as Prime Minister/leader of the Labour/Conservative party?

COMBINED RATING AVERAGE
OWN PARTY SUPPORTERS

COMBINED RATING AVERAGE
OPPOSITION PARTY SUPPORTERS

POLARISATION GAP

PARTY LEADERS



leader is growing. This is support for the theory that political polarisation may be growing, although not yet conclusive proof.

Having said that, even though many people believe that their society is becoming more divided, it is still easy to overstate the problem. Ipsos research for the BBC¹² shows that around the world, one in three think that political divisions are dangerous for society, but exactly the same proportion think that in fact it is healthy for society to have a range¹³ of different views. And only three in ten think that those with opposing political views don't care about people like them. It's also important not to mix up cause and effect – declining trust could be an outcome of this just as much as it is a driver, and other factors are likely to have an impact: for example, economic insecurity since the Great Recession has been shown to be associated with increases in support for populism and political distrust.¹⁴ Nevertheless, feelings of negative partisanship and antagonistic tribalism may be contributing to our perceptions of a crisis in trust. It could be that low levels of trust over the long term have made us more susceptible to polarisation.

We wrote this report because the widespread media focus on trust in crisis made us want to examine what the data actually said about it. As we show, whether there is a new crisis of trust is debatable. But the crash of 2008, the rise of 'culture wars' and the deeper drivers of the crisis of the elites that the world is experiencing are driving a focus on trust.

This report seeks to inform that debate on trust, and to highlight what could be done to rebuild it. It will not be simple. We have lived with low levels of trust for decades, but we hope that this report is part of a more realistic appraisal of where we currently are, and what might be done.

SECTION 1

THE TRUTH ABOUT TRUST

Modelling trust



MODELLING TRUST: WHAT IS IT, HOW DO I DO IT AND HOW DO I EARN IT?

HANNAH SHRIMPTON

Research Manager

ALIYA MIRZA

Research Manager

With increasing frequency, clients from every part of our business routinely ask us about trust. And they're right to. Trust is the building block of friendships, love, families, organisations and workplaces. It matters for economic, political and social success.¹⁵ When asking about how to be successful, clients are partly asking: how do I maintain or increase trust from my audiences, where should I place my trust and how does trust work?

However, most of the conversations and debates around trust often leave out the crucial question of what trust actually means (either practically or philosophically). It's a question that academia has been debating for years: the landscape is a complex map of theories, counter theories and contradictions. Unfortunately there is no common understanding of what constitutes trust, or how to measure it. It's at least clear that trust is highly contextual, and we would argue there can be no 'one-size-fits-all' model of trust which will suit every purpose and occasion. So our aim here is to cover some of the main components of trust that appear in academic

SO, IT IS NOT ENOUGH TO ASK
“WHAT IS TRUST?” OR “HOW CAN I
INCREASE TRUST?”. WE HAVE TO ASK
“WHO TRUSTS WHO TO DO WHAT?”

models to help build up a framework through which the rest of the articles are understood.

TYPES OF TRUST

But before exploring what trust *means*, the first thing to acknowledge is that trust functions on many different levels. It is clear that what would inspire someone to trust in a neighbour is very different to what would inspire trust in a coffee shop or a governmental system. Trust between individuals (interpersonal trust) is qualitatively different from institutional or organisational trust, or trust in systems, but on the other hand, some of the underlying factors are similar.

We will examine these various concepts of trust elsewhere in this report; but at least here, tackling the basic meaning of trust, it makes sense to do so through the paradigm of interpersonal trust. Trust between individuals is often argued to form the foundation of other types of trust.¹⁶ This is reflected in some of our own work for clients. For example, we find that brand relationships function in many ways like human-to-human relationships and, in fact, are often *directly* to do with relationships between humans, such as the impact of employees' behaviour on your customers' satisfaction.¹⁷

WHAT IS TRUST?

So how can you increase interpersonal trust? Although there is not a clear answer, the aim of most academic models of trust is to

provide tools to do just that. However, often models contradict, overlap or use different terms for the same concept.

So cutting through the conceptual quagmire, there are three dimensions to trust that consistently pop up across the academic trust models. As Hardin champions, trust is “generally a three part relation: A trusts B to do X”.¹⁸

- *How* to trust. The trustor must have some capabilities or characteristics that enable the transaction of trust.
- *Who* to trust. The trustee must have some ability to be trustworthy or have some characteristics that make them so.
- *What* you're trusting them to do. Trust is contextual and can mean different things in practice in different scenarios. We generally trust people to do certain things, for example to look after my belongings on a train, or to tell me the right directions. We rarely trust people unconditionally or completely.

So, it is not enough to ask “what is trust?” or “how can I increase trust?”. We have to ask “*who* trusts *who* to do *what*?”. Different models of trust flesh out these bare bones of trust in different ways. As we deal with each of these dimensions in turn, we'll draw on some of the different theories that elaborate or emphasise these elements.

HOW TO TRUST

Let's start with the trustor. In order to inspire trust in someone, we must ourselves have some ability or be in conditions through which trust can blossom.

Be vulnerable, be optimistic and have a ‘propensity to trust’

First, trust models often underline the necessity of vulnerability. Trust requires the trustor to be vulnerable. There must be some risk, some possibility that one can lose out, or be disappointed, as a result. If it was an absolute certainty that the stranger on the train would look after my laptop, then running to the on-train café and back wouldn't involve trust. As humans are unreliable things, most

Modelling trust

social interaction will involve some risk of disappointment – “trust is a device for coping with the freedom of others”.¹⁹

Secondly, trust requires a healthy dose of optimism from the trustor – a willingness to believe that someone will be honest or do what they say they will. Govier underlines this in her book on social trust.²⁰ People cannot trust one another if their automatic reaction is to be suspicious or assume the worst about the other, as in “it wasn’t an accident – he broke my watch on purpose because he doesn’t care about my feelings”. This balance of optimism can tip to pessimism depending on the circumstances.

Mayer, Roger and Schoorman’s interactive model of trust expands this, adding the variable of ‘trustor’s propensity’. Some people are simply more trusting than others – *regardless* of the circumstances. This means that you are not always going to be able to increase a certain individual’s trust in you – no matter what you do or who you are. The model says that propensity to trust depends on life experiences and personality type, but also takes into account cultural background – underlining cultural diversity in trusting behaviour²¹ [for example, Robert Putnam’s research finding Scandinavians are more trusting wherever you put them].

Making the judgement – reasoning and ‘leaping’

Trust then also needs the trustor to make a *judgement* about the trustworthiness of the trustee. This judgement can be both rational and emotional, and different models of trust emphasise the importance of each.

There has to be a rational element – we do at least try to cognitively calculate the level of risk when we trust someone. As I square up the stranger on the train, I’ll think through reasons why it seems a decent probability they won’t make off with my laptop. For starters – they can’t get far.

But many argue having robust, rational reasons to trust someone is not enough to ensure trust. We’re not robots and we simply don’t have time to go through and weigh up all possible scenarios.

WE SOMETIMES TRUST PEOPLE TO
DO THINGS EVEN THOUGH EVIDENCE
SEEMS STACKED AGAINST THEM. GEORGE
SIMMEL SAW THIS AS THE MYSTICAL
FAITH OF ONE HUMAN IN ANOTHER

Another human's brain is completely unreachable to us – the true probability of the stranger making off with my laptop isn't written down for me – and is why trust involves a risk in the first place. As Giddens argues, it's not just about coping with the freedom of others – it's about lack of full information.²²

So ultimately there is an emotional dimension to trust. There's a kind of magic to trusting – called a 'leap' or 'suspension' in the academic literature.²³ We sometimes trust people to do things even though evidence seems stacked against them. Experiments show that people will reject what they see as an unfair offer (even if in absolute terms it leaves them better off).²⁴ Why we do this is unclear – George Simmel saw this as the mystical faith of one human in another.²⁵

David DeSteno argues this 'mystical faith' actually has a biological basis. The hormone oxytocin, sometimes called the 'love hormone' due to its presence during hugging, sex and childbirth, has been linked to various social emotions too.²⁶ Recent studies have also shown that oxytocin can increase feelings of trust²⁷ by increasing people's willingness to take social risks. Fiddling about with customer's hormone levels is out of reach for most of our clients, but it's an interesting insight into how trust could be an integral part of our DNA.

TRUSTWORTHINESS ITSELF IS A
CHARACTER OR BEHAVIOURAL
TRAIT OF THE PERSON WHO WISHES
TO BE TRUSTED AND SOMETHING
TO AIM FOR TO INCREASE TRUST

HOW TO BE TRUSTWORTHY

Even if there is an emotional element to trust – part of the judgement mentioned above is the assessment of other people's trustworthiness. Trustworthiness itself is a character or behavioural trait of the person who wishes to be trusted and something to aim for to increase trust.²⁸

Be competent and reliable

Broadly, there are at least two drivers of trustworthiness that come up again and again in the different models of trust: competence and reliability.

As we have seen, trust is contextual. It is the requirement to have competence or skills in something that locks trust into a specific domain. To be trustworthy to someone, you don't have to be good at *everything*, but you do have to have an ability pertaining to a certain thing.²⁹ For example, my plumber may be highly competent at pipework, but completely useless at singing. I can therefore trust her to fix an overflowing toilet, but wouldn't let her near a stage. In order to build up trust, it's important to show you are competent at the things that matter for your business context – very few people will trust you completely.

But it's also argued that it's not enough to be good at something – you must also be reliable. To be dependable, there must

HOWEVER, SOME MODELS POSIT
THAT NOT ALL TYPES OF MOTIVATION
CAN LEAD TO TRUSTWORTHINESS.
FOR MAISTER, MOTIVATION
CANNOT BE PURELY SELF-ORIENTED

be some clear motivation communicated to the trustor. In our example, I have to see my plumber is committed to fixing the toilet – she could have all the competency in the world but remain unmotivated to get up and do it. This motivation could come from a variety of places (including that I'm paying her).

Philosopher Phillip Pettit has outlined three different types of trust, each of which incorporates higher levels of buy-in from the trustee.³⁰ The most fundamental of the three levels is basic trust, which combines the concepts of competence and reliability. This is what we often think of trust, essentially that we can expect others to behave in a consistent and coherent way.

Avoid self-interest

However, some models like Maister's Trust Equation posit that not all types of motivation can lead to trustworthiness. For Maister, motivation cannot be purely self-oriented.³¹ He argues even if you have competency and reliability, but appear to be self-oriented, i.e. acting in your own self-interest, then you can completely undermine your own efforts to be trustworthy: banks for example, might suffer here.

Others call this 'benevolence' – or the extent to which a trustee is believed to want to do good to the trustor, aside from an egocentric profit motive.³² From this model, I need to see at least some degree of personal kindness within my plumber. If she talked

WHILE DIFFERENT WAYS OF
CONCEPTUALISING OR UNDERSTANDING
TRUST HAVE THEIR VALUES, FOR
OUR PURPOSE OF INVESTIGATING
THE SO-CALLED 'CRISIS IN TRUST',
THE IDEA OF 'TRUSTWORTHINESS'
IS ACTUALLY MORE USEFUL

solely about money or showed little motivation other than getting my money, I'd be slightly less inclined to trust her, however good she was at plumbing.

This chimes with Pettit's next level of trust. Once basic trust has been achieved, the next level of consideration is whether the other party will treat you well. Do they have your well-being in mind when they make decisions and conduct their affairs? This is called active trust. Getting these sorts of 'duty of care' activities right offers brands a way of starting to build more meaningful levels of trust.

Have integrity and shared values

A perceived level of integrity is also sometimes seen to be important in the evaluation of trustworthiness. 'Integrity' is a complex concept that leads to various spin-off arguments, but McFall defines integrity as encompassing honesty, fair treatment and the avoidance of hypocrisy.³³ Your perceived level of integrity will be tied up in your past actions, whether and how often people

vouch for you and whether your actions match up with what you say – all of which are regular measurements of an individual's (and indeed a politician or a company's) reputation.

Pettit's third level of trust – interactive trust – builds on this, moving trust from fairly functional aspects of a relationship, to a very human set of characteristics. This type of trustworthiness means we expect the very act of trusting someone should bring out the best in them. Think of the stranger on the train who I ask to mind my bag. Pettit's interactive trust suggests that my trust in them will motivate them to help deliver on that trust. But why do we feel this way? Because we want to be well considered – we want others to think well of us. Another's assessment of us as trustworthy means we are often motivated to 'rise to the occasion'.

FROM TRUST TO TRUSTWORTHINESS

While different ways of conceptualising or understanding trust have their values, for our purpose of investigating the so-called 'crisis in trust', the idea of 'trustworthiness' is actually more useful. We have taken Pettit's levels of trust and the three key elements of 'trustworthiness' – be competent and reliable; avoid self-interest, and; have integrity and shared values – as our foundation.

Basic trust

- It is reliable/keeps its promises
- It is good at what it does

Active trust

- It behaves responsibly
- It is open and transparent about what it does
- It is well led

Interactive trust

- It does what it does with the best of intentions
- It shares my values
- It would try to take advantage of me if it could

In another section of this report, we analyse our latest data to understand what factors are most important to our decision to trust an organisation – the drivers of trustworthiness.

The drivers of trust in brands and government

UNTRUSTWORTHY



UNTRUSTWORTHY



UNTRUSTWORTHY



UNTRUSTWORTHY



THE DRIVERS OF TRUST IN BRANDS AND GOVERNMENT

GIDEON SKINNER

Research Director

Long-term trends allow us to explore the deeper societal undercurrents in trust. But what is the current state of trust in public and private sector institutions? To test this, Ipsos has set up a Global Trustworthiness Monitor, consisting of around 18,000 online interviews in 23 countries worldwide, to measure current attitudes towards the trustworthiness of institutions, and to explore what might drive them.

The research is some of the first we know of to directly ask about 'trustworthiness' rather than 'trust', and the initial results are not encouraging. Of the eight institutions asked about – government, public services, the media, banks, technology, pharmaceutical, oil and gas and food and drink companies – none are seen as trustworthy by a majority around the world overall. Governments come out particularly badly, with most describing them as untrustworthy, but the media, banks and oil and gas companies are also all seen as more untrustworthy than trustworthy by a margin of 2:1. Only technology companies receive a clearly positive score, though for public services and food and drink companies the net balance is roughly equal. It is also notable that anywhere between

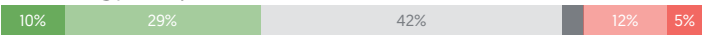
The drivers of trust in brands and government

IPSOS TRUSTWORTHINESS MONITOR

Please look at the list of different types of organisations and institutions. In general, do you think each is trustworthy or untrustworthy? Please use a scale of 1 to 5, where 1 is very trustworthy and 5 is very untrustworthy

VERY TRUSTWORTHY TRUSTWORTHY NEITHER
DON'T KNOW UNTRUSTWORTHY VERY UNTRUSTWORTHY

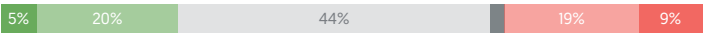
Technology companies



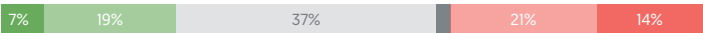
Public services



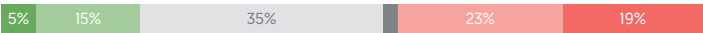
Food and drink services



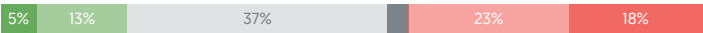
Pharmaceutical companies



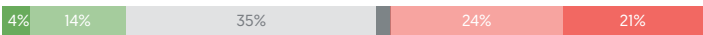
Banking companies



Oil and gas companies



The media



The government



Source
Ipsos Global
Advisor

Base
c16,400 – 17,800
online adults
aged 16-64 in
23 countries,
October 2018

30%-45% on average give a neutral or 'don't know' answer. This may be partly because of the focus on 'trustworthiness' rather than 'trust' – participants are being asked to make a judgement on whether or not the organisations deserve their trust, a harder question, and clearly many organisations are not giving enough information for the public to be able to judge that one way or the other.

Having said that, again we need to be wary of sweeping statements treating all countries and all institutions the same. In countries such as Britain, France, the US, Canada and Japan, for example, a clearly negative view of the government doesn't stop people having a more positive view towards public services. But, on the other hand, emerging economies such as South Africa, Argentina, Brazil and Mexico tend to be much less trustful of both government and public services – perhaps reflecting relatively high levels of concern about corruption in many of those countries. European countries, meanwhile, are particularly suspicious of business.

What is important about this study, though, is that as well as measuring overall attitudes towards trustworthiness, it also measured some of the specific factors that are said to drive trustworthiness. By comparing people's overall scores on trustworthiness with how they feel about particular attributes, can we discover what drives public attitudes towards trust? Based on examining the literature on trust, we asked participants about eight particular factors that might be associated with overall levels of trust, covering the three different types of trust – basic, active and interactive – identified earlier:

1. Is the organisation good at what it does?
2. Is it reliable/keeps its promises?
3. Is it well led?
4. Does it behave responsibly?
5. Is it open and transparent about what it does?
6. Does it do what it does with the best of intentions?
7. Does it share your values?
8. Would it try to take advantage of you if it could?

The drivers of trust in brands and government

All eight sectors fared worst when the public were asked whether these organisations would be prepared to take advantage of them, were open and transparent, and shared their values. People were more positive, however, about their overall levels of competence. This suggests that there is a disconnect between individual and institution, driving suspicion. People see a lack of openness, and feel not only that they do not share the values of many of these bodies, but that these sectors cannot be trusted to not actively take advantage of the public for their own benefit.

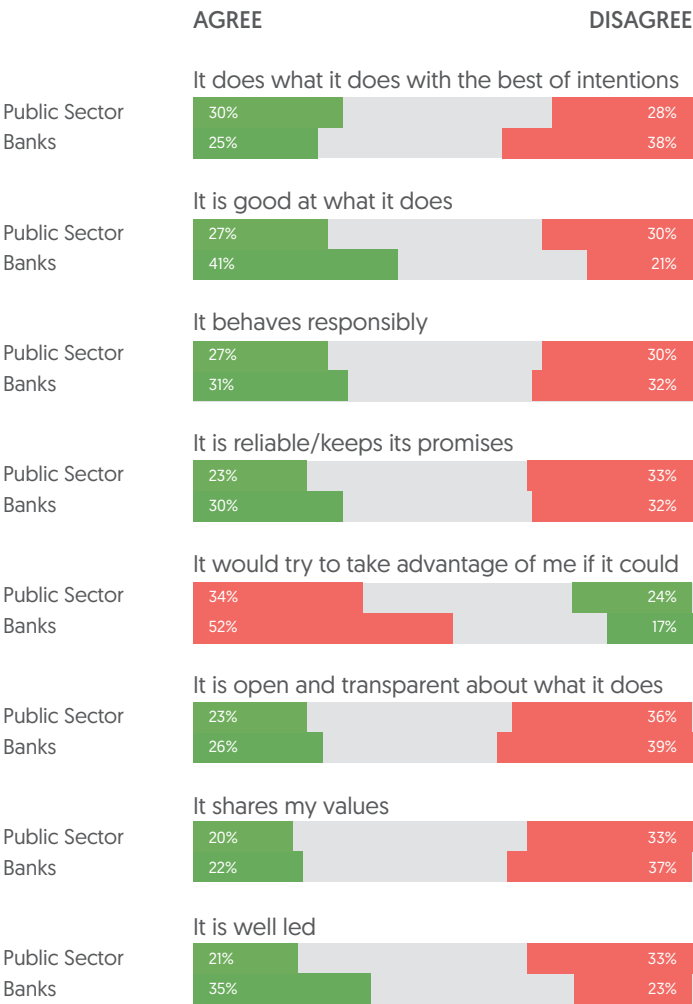
Overall, people's rankings of organisations on these factors were similar to the overall trustworthiness ratings, with government and media doing worst, and technology companies the best. This is of course reflecting perceptions rather than necessarily the truth: most civil servants and politicians do not go into government to deceive or thwart the public.

However, there were differences, which give some pointers about where the priorities should be for different sectors. Governments were rated especially badly, compared against the industry sectors, on competence, leadership, and reliability. Competence and perceived leadership were also issues for public services – but public services were the least likely to be accused of taking advantage of people. The opposite was true for banks, who received slightly above average scores for competence and leadership, but below average scores for having the best intentions, and for taking advantage of others if they could.

We also asked people what they felt was important in deciding whether or not to trust an organisation (whether it took advantage of you was not included). Across nearly every country, three factors stood out as most important: whether the organisation is reliable, whether it is open and transparent, and whether it behaves responsibly. This suggests that what people think they want to see is a mixture of traditional and newer factors. Reliability has been a staple part of many models of trust for some time, but this data also suggests that in today's world, citizens and consumers want to see openness and transparency too. Having said that, nearly all the factors were picked out as important by at least one in five people globally, with competence standing out as notably important in Italy, France and Turkey. Leadership was

HOW PUBLIC SERVICES AND BANKS COMPARE
ON DIFFERENT FACTORS OF TRUST

To what extent, if at all, would you agree or disagree
with the following statements about [organisation]?



Source
Ipsos Global
Advisor

Base
c16,400 – 17,800
online adults
aged 16-64 in
23 countries,
October 2018

The drivers of trust in brands and government

THE DRIVERS OF TRUST

How strongly associated are individual trust factors with ratings of overall trustworthiness?

Is reliable/keeps its promises

15%

Does what it does with the best of intentions

13%

Behaves responsibly

12%

Would try to take advantage of you if it could

-10%

Shares your values

10%

Open and transparent about what it does

9%

Is good at what it does

8%

Well led

5%

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S

Source
Ipsos Global
Advisor

Base
c17,800 online
adults aged
16-64 in 23
countries,
October 2018

$r^2=0.39$ [in other words, this model explains 39% of the variation in the question "In general, do you think [ORGANISATION] is trustworthy or untrustworthy?"]

seen as least important to trust, but was still not negligible, and especially so in China and Saudi Arabia.

We took our analysis a step further. As well as asking people what they thought was driving their trust in an organisation, we also carried out statistical analysis to uncover what factors really were associated with different levels of trust, holding everything else

constant. The results might be surprising, and do not match up exactly with people's stated beliefs.

First of all, this analysis found that all the eight factors were significant drivers of trust in their own right. This backs up the idea that 'trustworthiness' really is a complex, multi-faceted concept that cannot be easily reduced to a simple model of just one or two factors (and whilst our model was reasonably strong, with an r-squared coefficient of 0.39, it also suggests that there are other factors that will play a part that we weren't able to cover). This means that there is no shortcut for organisations that are trying to build trust. As we would expect for such an all-encompassing idea, it is affected by every aspect of what an organisation may do: its core competence, its delivery of outcomes, its values and behaviours, its communications and openness, and its leadership.

It is also interesting to compare the relative order of the strength of these factors with people's stated views. In both, reliability is clearly key, while the quality of leadership is less so (but leadership still makes a difference). But there are some differences in emphasis elsewhere. Notably, the importance of an organisation's intentions, or integrity, is relatively more important in the statistical model, while core competence is relatively less so. Again, this doesn't mean that being good at the basics isn't important, just that when it comes to being trusted, what you set out to do is even more so. It also goes to show that people take into account selfish behaviours too. If they think an organisation is likely to actively seek to take advantage of them if they get the opportunity, that has a negative impact on trust.

Within this overall model, there are further subtle differences within country and within sector – again demonstrating that a simplistic, one-size-fits-all approach to trust just doesn't work. For example, there are several countries where simple competence does become relatively more important – such as Argentina, France, Italy, Mexico, Saudi Arabia and Spain. Reliability and keeping promises is particularly important in Japan and South Korea. Sharing values has more of a relative impact in Germany and Sweden, while integrity is particularly powerful in the US. In the UK, trust is likely to fall if people think organisations are out to take advantage of them. There are also nuances by sector.

The drivers of trust in brands and government

Setting out with good intentions is particularly important to trust ratings of government and public services, while the importance of leadership drops out of the model completely for the media, public services, pharmaceuticals, and food and drink companies. For banks, competence is also not in the model [perhaps because it is assumed to be there as a hygiene factor]; instead, the top three are sharing values, reliability and being transparent. Reliability and competence are both important for technology companies, while responsible behaviour is most important for oil and gas and food and drink companies.

So what are the key conclusions from this first Ipsos Global Trustworthiness Monitor?

- Few people around the world think their governments, public services, media or many industrial sectors are trustworthy – with governments and the media particularly low down on the list.
- Many are in a neutral position rather than being actively negative – if citizens and consumers can be engaged with on the issues that matter to them, improvement is possible.
- Our model of the drivers of trust shows that there is no silver bullet to being seen as trustworthy, and no cutting corners. This is fitting for a concept as important as trust, and one that reaches into every aspect of an institution's behaviour – if the answer was easy, it wouldn't be as prized.
- For the public themselves, they perceive the most important drivers of trustworthiness to be reliability, transparency and responsible behaviour.
- All of this can vary by country and by sector – you need to have an understanding of your specific cultural and market context to succeed.

GLOBALLY, SCIENTISTS ARE SEEN AS THE MOST TRUSTWORTHY PROFESSION, WITH 60% OF PEOPLE AROUND THE WORLD TRUSTING THEM.

POLITICIANS ARE SEEN AS THE LEAST TRUSTWORTHY, WITH TWO-THIRDS [67%] SAYING THEY ARE UNTRUSTWORTHY^{IV}



SECTION 2

TRUST IN SOCIETY

Social trust: how much do we trust each other?



SOCIAL TRUST: HOW MUCH DO WE TRUST EACH OTHER?

RACHEL ORMSTON

Research Director

Social trust – the trust we have in each other – has preoccupied researchers and commentators for decades. While the impact of distrust in politicians on our inclination to vote in elections may be obvious, the consequences of lack of trust in our fellow citizens are arguably far more damaging and wide-ranging. Social trust has been linked not only with democratic engagement, but also with national economic growth, quality of life, and even rates of suicide.³⁴ Being able to trust each other is central to Putnam's concept of social capital – when people get together, their trust in each other and their ability to work collectively to solve social problems is increased.³⁵ In this context, anxiety about social trust is about much more than just how we feel about each other – but about the wider ripples low social trust creates for the democratic, social and economic wellbeing of society.

As David Halpern argues:

“In short, it's not much fun living in a place where you don't think other people can be trusted. Low trust implies a society where you have to keep an eye over your shoulder; where deals need lawyers instead of handshakes; where you don't see the point of

Social trust: how much do we trust each other?

paying your tax or recycling your rubbish (since you doubt that your neighbour will do so); and where you employ your cousin or brother-in-law to work for you rather than a stranger who would probably be much better.”³⁶

So just how much trust do we have in each other? And do we trust each other less than we used to? In this article, we take an overview of trends in survey data around the world to try to answer this question.

The most common measure of social trust is based on some variation of the question:

“Generally speaking, would you say that most people can be trusted or that you can’t be too careful in dealing with people?”

A variant of this question has been included regularly on the World Values Survey and European Values Survey (since 1981), Latinobarometro (since 1996), European Social Survey (since 2002), the General Household Survey in the USA (since 1972) and British Social Attitudes (since 1998), so we can compare patterns across countries and over time.

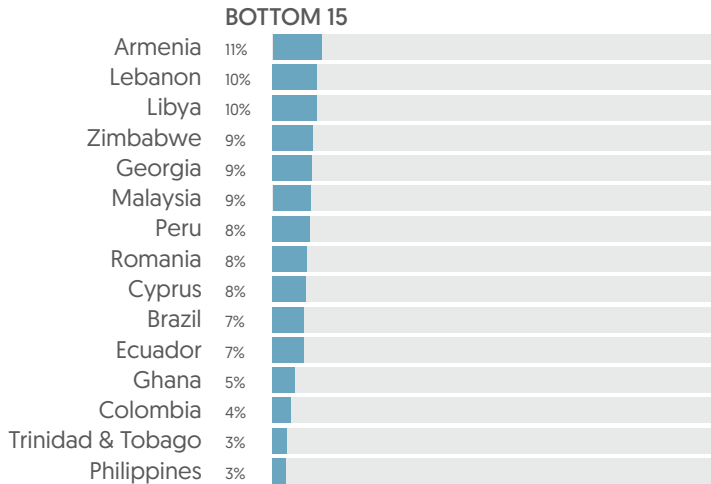
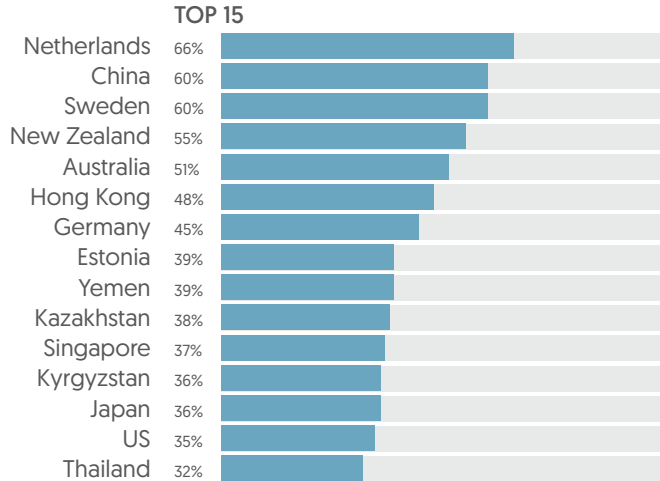
Scandinavia tops the trust tables

While the exact figures produced by different surveys vary, in all the surveys in which they feature, Norway, Denmark and Sweden feature in the top five most trusting, with 60%+ saying they feel most people can be trusted. The Netherlands, Finland and Iceland also occupy positions near the top (for example see the most recent wave of ESS), as does China [60%] in the most recent World Values Survey [WVS] [2010-14].

At the other end of the trust rankings are many Latin American countries. In the most recent Latinobarometro [2017] only Ecuador recorded trust levels above 20%. The small number of African countries included in the WVS tend to have low levels of social trust as well. Eastern European countries also tend to be less trusting than those in the west of the continent, with some notable exceptions – France, for example, falls in the bottom half of the social trust rankings in both the most recent European Social Survey [ESS] and the European Values Survey

WHICH COUNTRIES ARE THE MOST TRUSTING?

World Values Survey 2010-14, % 'Most people can be trusted'



Source

World Values
Survey data
analyser,
available at:
<http://www.worldvalues-survey.org/wvs.jsp>

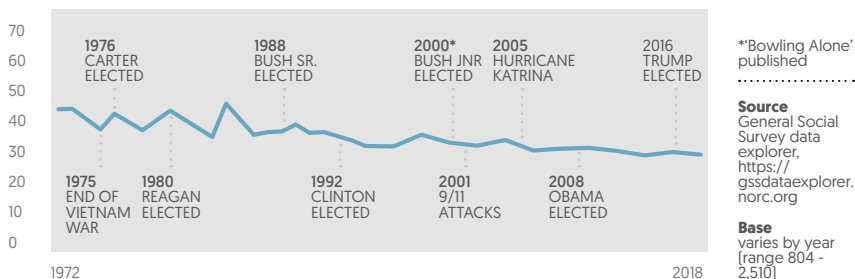
Base

varies by
country [range:
841-3,531]

Social trust: how much do we trust each other?

CHANGING SOCIAL TRUST IN THE US

General Social Survey, % saying 'Most people can be trusted'



[EVS]. Meanwhile, trust levels across Asia vary widely, from 9% in Malaysia to over 60% in China [WVS, 2010-14].

Declining social trust is not a uniform global phenomenon

Examining patterns over time also shows that, in spite of media narratives to the contrary, social trust is not declining in a uniform manner across the world – there are clear variations in trends in trust between countries.

Americans have become more inclined to bowl alone

In the USA – the focus of Putnam's seminal work on declining social capital – there is indeed some evidence for a long-term fall in social trust, although much of the decline occurred by the mid-1990s. The General Social Survey shows that, in the 1970s and 1980s, the proportion of Americans who said most people could be trusted fluctuated around the 40% mark, before falling to the mid-30s by the early 1990s, and to the low-30s from the mid to late 2000s. The World Values Survey also shows declining trust in the United States, falling from 44% in 1981-84 to 35% by 1995-98 [and staying at this level in the most recent data, from 2010-14].

However, while social trust remains at a historically low level, there is no evidence that the apparent sharpening of political divides in the USA since the election of Donald Trump in 2016 has led to any

further decline. The 2018 GSS figure puts trust at 31% – on a par with figures from 2006 onwards. However, if general trust in others has not changed since Trump, our willingness to trust people whose political beliefs differ from ours may have suffered more. Research has highlighted a steep increase in political polarisation in the US – the proportion of both Democrats and Republicans who hold ‘very unfavourable’ views of their counterparts in the other party has rocketed since the mid-1990s.³⁷ So while Americans’ general propensity to trust each other has not fallen any further over the last decade, the intensity of distrust between partisans may well have increased.

Long-term downward trend in Latin America (but a lot of movement in between)

Only two of the 18 countries included in the most recent Latinobarometro [Ecuador and Chile] recorded higher levels of social trust compared with the earliest year of the survey in 1996. Across the other 16 countries, people’s trust in their fellow citizens has either stayed at its previous low level [Costa Rica, Peru] or fallen, by 14 percentage points or more in the cases of Guatemala, Panama, Paraguay and Uruguay.

However, the decline in social trust apparent across Latin American countries has not been linear. In Venezuela, for example, trust increased from 11% in 1996 to 25% in 2007, before falling back again from 2013 onwards, following the death of Hugo Chavez and the subsequent political and economic turmoil, to its current low of 9%. Other Latin American countries have also seen similar rises and falls over the last 20 years.

Trends in trust vary widely across Europe (and between surveys)

Establishing a clear picture of trends in trust across Europe is complicated by differences in trends between different studies [WVS, EVS and ESS]. For example, the WVS finds that trust has fallen since the 1990s in six out of the eight Eastern European countries included in the 2010-2014 wave. The ESS, in contrast, shows mean trust scores increasing between 2002-06 and 2012-16 for four of these countries!

IN THE UK, MILLENNIALS [THOSE
BORN BETWEEN 1980 AND 1995]
WERE MARKEDLY LESS TRUSTING
AS YOUNG ADULTS THAN PREVIOUS
GENERATIONS, THOUGH THEY HAVE
BECOME MORE TRUSTING WITH AGE

However, what is clear is that there is no evidence of a Europe-wide decline in social trust. Indeed, a number of countries have seen their levels of trust in other people increase substantially in recent years. Scandinavia (Sweden, Norway and Denmark) has become even more trusting, improving on an already high base, while Germany and the Netherlands also recorded double-digit increases in social trust from the 1981-84 to 2008-10 waves of the EVS.

Meanwhile, in Britain, recently published British Social Attitudes data indicates that, after remaining broadly constant from 1998 to 2014 [at 45-47%], the proportion who say most people can be trusted actually increased to 54% between 2014 and 2017. Very similar patterns of rising trust in the ordinary man or woman in the street are apparent from Ipsos MORI's annual Veracity Index. So in spite of the apparently extreme divides in Brexit Britain, if anything, Brits are becoming more inclined to trust each other, not less.

There is no clear trend across the rest of the world

Levels of social trust have also gone up as well as down elsewhere in the world. In Australia, for example, social trust fell back between the 1981-84 and 1995-98 rounds of the WVS, before increasing again in 2010-14. In India, trust fell from 34% in the early 1990s to just 17% in 2010-14 [WVS]. Trust has also fallen in recent years [to a lesser extent] in South Korea and Taiwan, but has held steady at around 60% in China. In short, while a number of countries have

seen social trust fall in recent decades, there is no single consistent pattern – claims of a ‘global crisis’ are overstated.

What explains diversity in social trust?

Theories about what underpins social trust abound. Recent work for the IMF has explored the impacts of economic inequality on social trust, arguing that inequality lowers people’s sense of fairness and therefore their trust in others [Gould and Hijzen, 2016]. This may help explain why the USA, where income inequality has increased over time, has seen declining trust, while high levels of trust have held steady or improved in countries like Sweden and Denmark where income is more equally distributed. Other research has looked at demographic and generational patterns to trust – for example, Ipsos MORI’s ‘Generations’ project in the UK found that while overall, most people become more trusting with age, there are also marked cohort effects. Millennials (those born between 1980 and 1995) were markedly less trusting as young adults than previous generations, though they have become more trusting with age. In contrast, however, ‘Generation Z’ (those born 1996 onwards) are much more likely to say they “generally trust the man or woman in the street to tell the truth” than their suspicious predecessors at the same age. In the US, generational divisions in trust are even more apparent. As Baby Boomers have entered older age, they have shown a pronounced decline in trust, while Generation X and Millennials started off with lower social trust and have remained less trusting.³⁸ The relationship between social networks – who you spend your time with – and social trust is another ongoing theme [e.g. Li et al, 2019]. In short, evidence suggests that the number of people in your social circle and their social status help predict how much you trust other people in general.

As overall patterns and trends in trust vary substantially between different countries, it is also likely that the drivers of trust vary across the globe. What is clear is that claims that people across the globe are becoming less likely to trust each other are premature. That is not to say that there is no reason to be concerned. Even in countries where trust is not continuing to decline, it is clear that the bar is set fairly low – with some notable exceptions, a majority of people across most countries are unwilling to trust their fellow citizens.

Social trust: how much do we trust each other?

This is a major problem. 'Transactional costs' will be higher for individuals and companies [as we formalise our exchanges because we don't trust each other to honour informal agreements]. We won't work effectively to solve collective problems – particularly when a lack of trust is combined with antipathy to people of a different political persuasion to our own. And our quality of life and even national economic growth may be hampered.

There is clearly no easy answer to restoring our trust in each other – if there were, governments would have done so decades ago. Action needs to focus on both the macro- and micro-levels. At a macro-level, given evidence that the degree of economic inequality within countries is a strong predictor of levels of social trust, particularly in advanced economies,³⁹ addressing the unequal distribution of wealth may also help to boost trust. At a micro-level, creating more opportunities for us all to mix with people who are not like us – including our political 'opposites' – to tackle increased social and political polarisation could, in turn, help us re-build our trust in each other. More generally, we need to look to those parts of the world where trust is high and growing for lessons on how to support and build trust between citizens, so that more of us can enjoy the economic, social and cultural benefits of a 'high trust' society.

THE 'DECLINE IN TRUST' HAS NOT BEEN LINEAR. IN VENEZUELA, FOR EXAMPLE, TRUST INCREASED FROM 11% IN 1996 TO 25% IN 2007, BEFORE FALLING BACK AGAIN FROM 2013 ONWARDS, TO ITS CURRENT LOW OF 9%^v



Trust in professionals and the Global Trustworthiness Monitor



TRUST IN PROFESSIONALS AND THE GLOBAL TRUSTWORTHINESS MONITOR

MIKE CLEMENCE

Research Manager

Do we trust some professions more than others? For over 35 years Ipsos MORI's Veracity Index has been asking the public which professions they think are most likely to tell the truth. While some professions are perpetually at the bottom [politicians], doctors were found to be the most trusted profession every year between 1993 and 2016.⁴⁰ More recent years have not shown a drop in trust in doctors – rather it was the addition of nurses to the roster which finally dislodged them from the top spot.

Building on this survey, here we widen our scope to 23 countries around the world and focus on trustworthiness, asking participants to rate how trustworthy they find different professions, on a scale of one to five.

We have chosen 'trustworthiness' as our measure, reflecting David Maister's research into operationalising trust, because it is a good fit for assessing professions:

- Some of our list, such as judges, should hold 'credibility' from their qualifications;

- Doctors might score highly on 'reliability' as we go to them for cures;
- Those with children entrust their care to teachers, which could be a measure of 'intimacy'.

It leaves only the denominator – perceived self-interest – unaccounted for, and this is where the public value of a profession can come into play. Those jobs which are held in high esteem

MAISTER'S THEORY

Proposed in 2000 by the Harvard professors David Maister, Charles Green and Robert Galford in their book 'The Trusted Advisor', the trust equation is an attempt to create a mathematical expression of how trust works. The theory relies on four factors – credibility, reliability, intimacy and self-interest.

The first three are at the top of the equation:

Credibility: does this person appear to know what they are talking about?

Reliability: does this person do what they say they will?

Intimacy: how well does this person understand me and my needs?

And the fourth fits at the bottom:

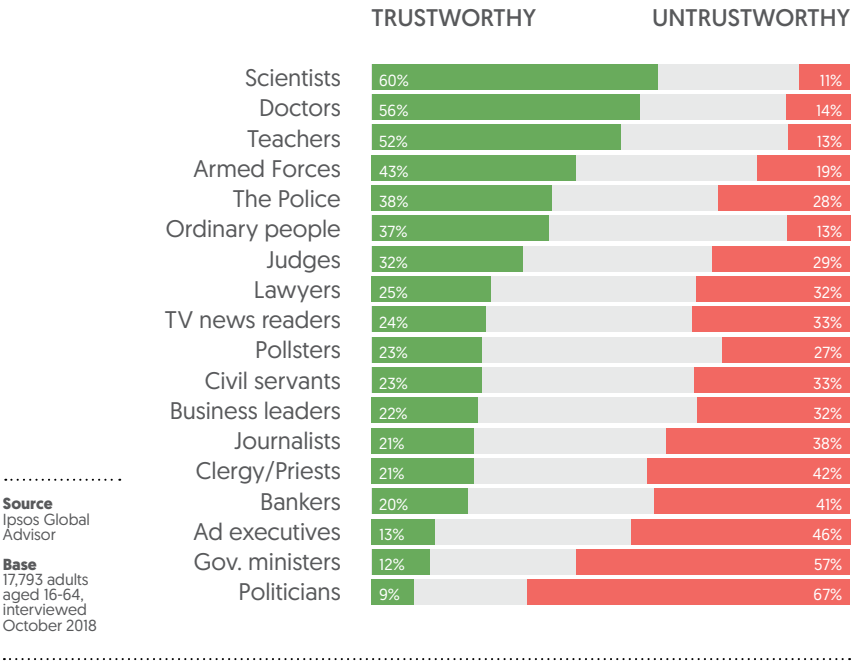
Self-interest: Is this person acting in their own interests [and not mine]?

The trust equation

$$\text{Trustworthiness} = \frac{\text{Credibility} + \text{Reliability} + \text{Intimacy}}{\text{Self-interest}}$$

GLOBAL TRUSTWORTHINESS OF PROFESSIONS

Please look at this list of different types of people. In general, do you think each is trustworthy or untrustworthy in your country?



by national publics (e.g. doctors) might be upweighted here, as people assume these positions' self-interest is aligned with theirs. By contrast professions which suffer from public doubts about their motives (for instance, bankers) might lose out.

In this chapter, after reviewing the most – and least – trustworthy professions, we will examine the drivers of trust in the average person, before considering how culture impacts the extent to which different countries are willing to say they find professions trustworthy. This leads to a presentation of the Ipsos Trustworthiness Monitor, which provides a more rounded view of which countries put greater faith in the professions.

Which are the most trustworthy professions?

Our new data shows that, perhaps unsurprisingly, doctors are widely trusted. But while they are rarely outside the top three in any given country, they aren't the most trustworthy profession: that distinction is reserved for scientists!

Six in ten (60%) rate scientists either a four or five out of five for trustworthiness and just 11% put them at one or two on the scale. Country-level trust ranges from a high of 76% in Russia to four in ten in South Korea and Japan (42% and 40%, respectively). The latter two countries are the only ones in our sample where less than half of the population give a high trustworthiness score to scientists. Although it is worth noting that the proportion who give them a low score is directly in line with most other nations, and in part reflects cultural difference in how Japanese and Korean people answer surveys – something we find across all subject areas.

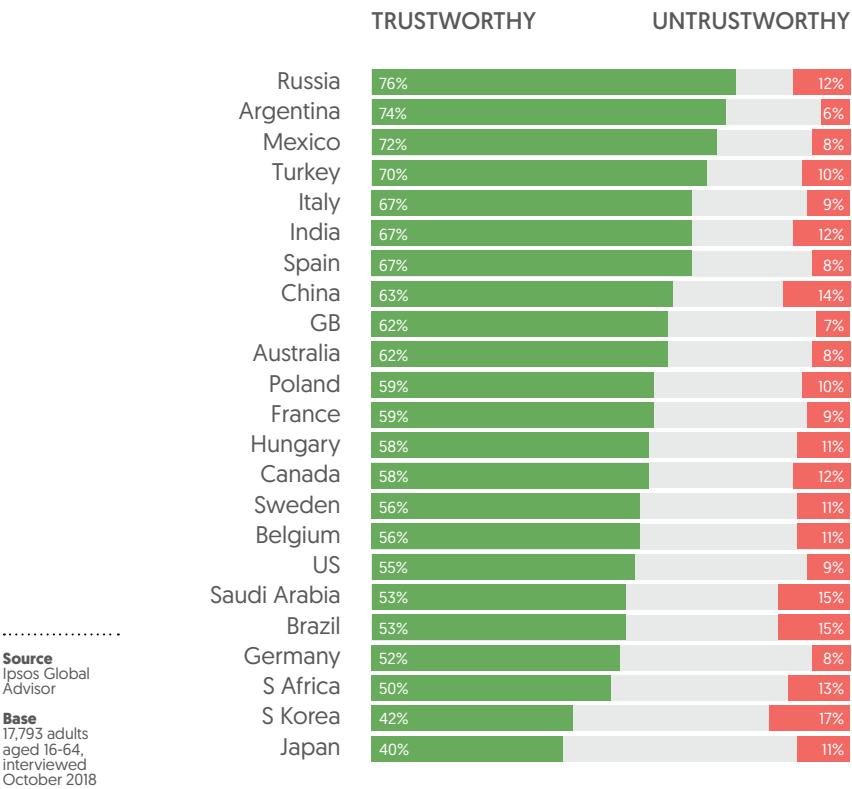
Doctors occupy the global second spot on 56%, with Spain and Australia the two most trusting of doctors (both 69%). Japan (39%) and South Korea (28%) are again the least likely to accord a high level of trustworthiness to doctors, but this time they are joined by Hungary (38%).

Teachers are the third most trustworthy profession worldwide, on 52 per cent. While Russians show the highest absolute level of trust in teachers (76%) they esteem scientists more highly still, and it is Brazilians and Americans who give teachers top marks for trustworthiness (57% and 61% respectively).

Few countries do not rate one of this triad of professions as the most trustworthy, but those that do represent a substantial chunk of the world's population – Indians consider members of the armed forces to be the most trustworthy profession (70%), while Chinese citizens report highest trust in the police (80%).

TRUSTWORTHINESS OF SCIENTISTS WORLDWIDE

In general, do you think scientists are trustworthy or untrustworthy in your country?

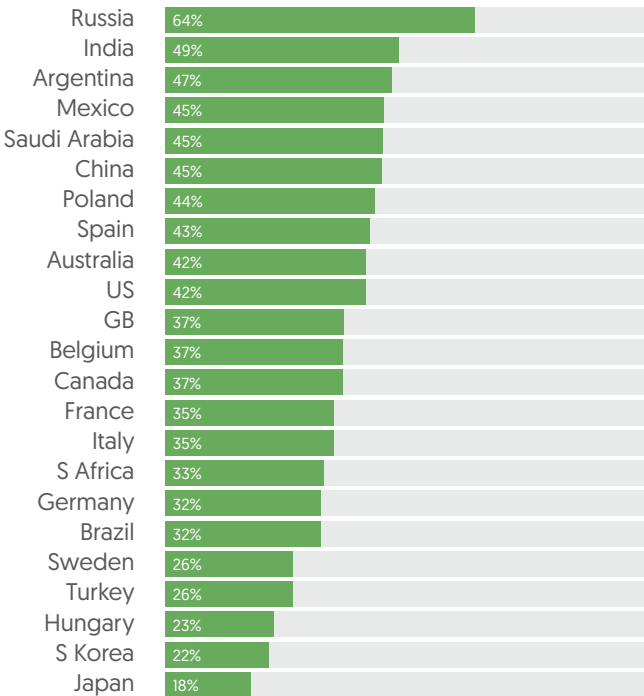


... and which are the least?

There is greater uniformity in low-trusted professions, with just two main types coming bottom in every country: politicians and advertising executives. Politicians are the clear winners of this dubious prize – 15 countries put “politicians generally” or “government ministers” bottom, compared with six countries that opt for advertisers.

WHO TRUSTS THE GENERAL PUBLIC THE MOST?

In general, do you think ordinary men and women are trustworthy or untrustworthy in your country?



Source
Ipsos Global
Advisor

Base
17,793 adults
aged 16-64,
interviewed
October 2018

- Politicians are lowest for Argentina, Brazil, Canada, France, Germany, India, Italy, Japan, Mexico, Poland, South Africa [as government ministers], South Korea, Spain, Turkey and the US
- Advertising executives are lowest for Australia, Belgium, Hungary, Russia, Sweden and Great Britain.

Where does the average citizen stand?

Trust in other people is commonly considered as a central pillar of social capital – and the proportion in any society who feel that “most people can be trusted” is one of its most important, and longest-running, metrics.⁴¹ Our poll approaches the topic from another angle, adding ‘ordinary men/women’ to the list of professions and asking the global public how trustworthy they are. On this measure we find emerging economies (often considered countries with lower social capital) to be the most positive about the average person. This does not necessarily match the described pattern in the previous chapter, but methodological differences should be taken into account. The Global Trustworthiness Monitor was carried out online, which means that in emerging economies respondents are more likely to be more educated and more urban than the population as a whole. This does reflect findings elsewhere – levels of trust tend to be higher for higher educated groups.

Russia leads the way with two-thirds of Russian citizens finding ordinary people to be trustworthy [64%]. The next most positive country is India [49%], followed by Argentina [47%] and Mexico, Saudi Arabia and China (all 45%). Although not all emerging economies are similarly optimistic – trust is much lower in Turkey [26%] and Brazil [32%].

By contrast, developed economies score lower: Spain is the most optimistic with 43% rating the average person as trustworthy and in France and Italy this is 35%. Sweden – usually a paragon of social capital – is in the bottom five, with 26% rating ordinary people as trustworthy. Hungary, South Korea and Japan form a now-familiar bottom three, on 23%, 22% and 18% respectively.

There may be other reasons for this inversion of expectation beyond methodological differences. The ‘optimism divide’ between emerging and developed markets⁴² means that those in the former group of countries might be more willing to give the benefit of the doubt to regular people, or the use of the term “ordinary” in a list of professions may make this type of person more sympathetic in some countries rather than others. And, as we show in the Trustworthiness Monitor overleaf, when we include all professions we get an ordering of countries more in line with the

expected pattern. Whatever the underlying reasons, it points to the importance of culture in mediating trust.

The impact of culture and the Trustworthiness Monitor

Differences between countries in survey response are a well-established part of international research, as are the theories to explain it, from “emotional expressiveness”⁴³ in some Mediterranean cultures, to the avoidance of extremes commonly witnessed in East Asian societies.

In our survey, the impact is seen in large differences in the *extent* to which professions are considered trustworthy. To give one example, while scientists are the most trustworthy profession in both Hungary and Russia, the proportion who consider them trustworthy is 58% in the former and 76% in the latter. Overall there appear to be three key country groupings:

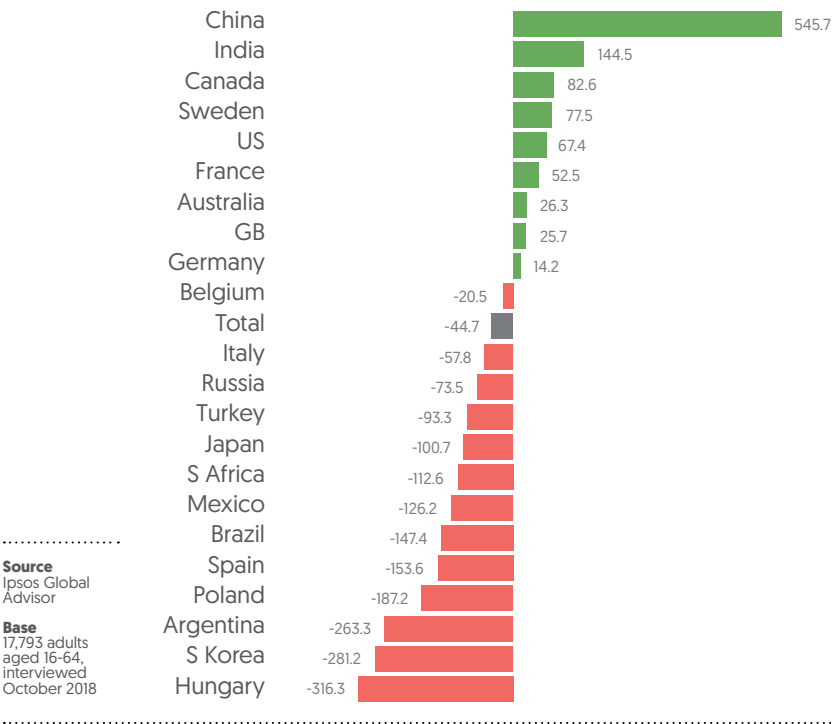
- Optimists: Countries, typified by China and India, who rate those in many professions as trustworthy
- Pessimists: For instance Hungary and Argentina, with a gloomier view who consider most professions to be untrustworthy
- Contingent: In this group, exemplified by Germany and Japan, we see a greater proportion who are ambivalent and perhaps less likely to make a judgement call solely based on a person's professional status.

A standard treatment of the data will miss the distinction between pessimists and contingent countries, as both show low overall percentages for trustworthiness. The difference between these groups is that while pessimists show high levels of distrust, among the contingent group distrust is lower. This means that the latter group may well be net positive about a number of professions, despite the lower trustworthiness scores they give.

To overcome this we have created the Trustworthiness Monitor: a measure which takes the sum score of trustworthiness for all professions and subtracts it from the sum score of the proportion

THE TRUSTWORTHINESS MONITOR

Net trust score across all professions



who find each profession not trustworthy. This reveals that the country most likely to consider most of the professions in the survey to be trustworthy is China – and Hungarians are the least trusting in our global sample.

The ordering of countries in the Monitor presents a mix of the theories mentioned previously: China and India, key emerging markets which tend to score higher on optimism but lower on social capital, are at the top of the list. Those countries commonly associated with higher social capital – such as Canada, Sweden and the US, alongside other anglophone countries are also towards the top with a net positive score. Finally, Latin American and post-Soviet societies, which rank lower in social capital and

THE MONITOR, LIKE SO MUCH
RESEARCH INTO TRUST,
HIGHLIGHTS THE IMPORTANCE
OF UNDERSTANDING EACH
COUNTRY'S CONTEXT –
GENERALISATIONS ONLY
TAKE US SO FAR

tend to have a more pessimistic outlook, fall into negative territory. The Monitor also produces a large gap between Japan and South Korea: while they often score similarly on trustworthiness of individual professions, there is greater negativity in South Korea and this is reflected here.

Our data on the trustworthiness of professions is another example of the complexity of trust. While each theory of trust can explain so much, it is incomplete unless the wider context is considered. The Monitor, like so much research into trust, highlights the importance of understanding each country's context – generalisations only take us so far.

A man in a dark shirt and glasses is seen from behind, looking out at a bright sunburst through curtains. The sunburst is composed of many yellow rays emanating from a central point. The curtains are grey and hang on either side of the sunburst. The man's head is slightly turned to the right.

Trust: the Truth?

CHINA AND INDIA
ARE THE MOST
OPTIMISTIC COUNTRIES
– RATING MOST
PROFESSIONS TO
BE TRUSTWORTHY^{VI}

A contract under strain – trust in government and politics



A CONTRACT UNDER STRAIN – TRUST IN GOVERNMENT AND POLITICS

GIDEON SKINNER

Research Director

If there is a crisis of trust anywhere, it is to be found in public attitudes towards government and politics. Consistently, trust ratings in the institutions and individuals who run our countries are some of the lowest that we see, compared against other institutions and other professions, and there are signs of long-term decline in several countries where data exists. At the same time, a closer look at the survey data suggests that trust in government and politics was never very high. It is also very different in different countries, for different branches of government, and trends over the last 10-20 years are less clear-cut than the longer-term pattern. This means it is vital to have a more sophisticated understanding of what trust in government actually means, and what specific aspects are driving discontent, rather than simply calling out a 'crisis'.

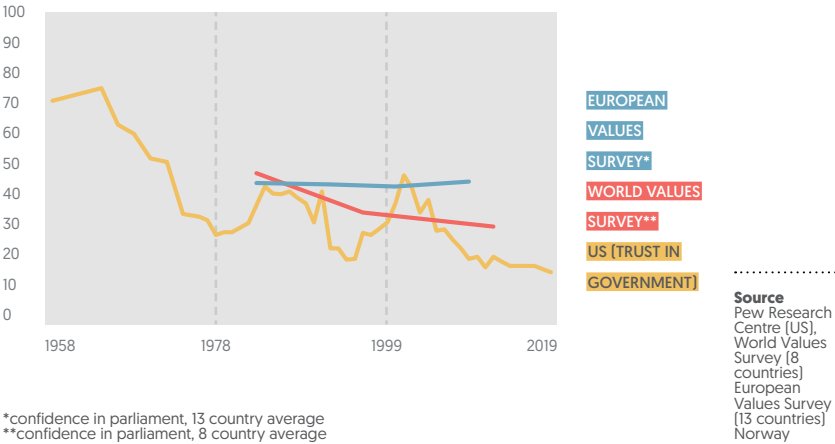
Trends in trust

The oldest survey trends of trust in government are found in the US, and here there is evidence of long-term decline. In the 1950s and 1960s a majority said they trusted the government in Washington

LONG-TERM TRENDS IN TRUST IN GOVERNMENT INSTITUTIONS

% trust the government in Washington always/most of the time [US],

% a great deal/quite a lot of confidence in parliament [WVS, EVS]



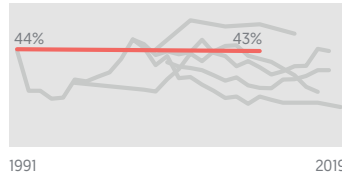
most of the time, according to Pew, but this took a sharp drop in the 1970s to only one in three. It rose again in the 1980s (though not to its former heights), fell again in the 1990s, rose and fell again. For the last decade it has been consistently low, at only around one in five, but it has not changed significantly over that time. Although trust reached equally poor levels for a short time in the 1990s, this is the longest period trust has been this low – again suggesting it could be a chronic issue. There are also declines in other countries around the world – especially Latin America, according to Latinobarometer – and also in the World Values Survey, where of the eight countries measured consistently between 1981 and 2010, six saw falls in confidence in their parliament.

Having said that, as with the US, the trend over the shorter-term period is less clear, which reflects different debates within the academic literature.⁴⁴ Again looking at the World Values Survey, more countries saw a rise or no change in confidence in their government between the 1990s and 2010s than saw a fall. The average levels of trust in parliament in Africa, according to

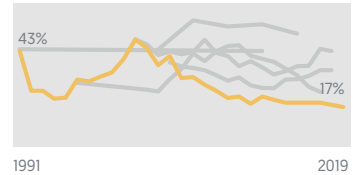
RECENT TRENDS IN TRUST IN GOVERNING INSTITUTIONS

% trust/confidence in government/parliament

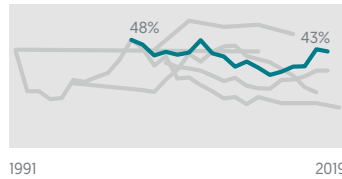
WORLD VALUES SURVEY



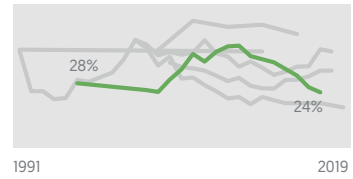
US (TRUST IN GOVERNMENT)



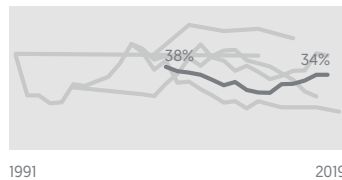
EUROBAROMETER 1



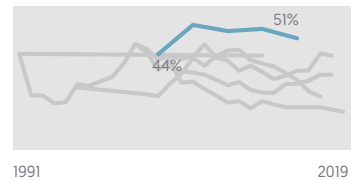
LATINOBAROMETER



EUROBAROMETER 2



AFROBAROMETER



Source

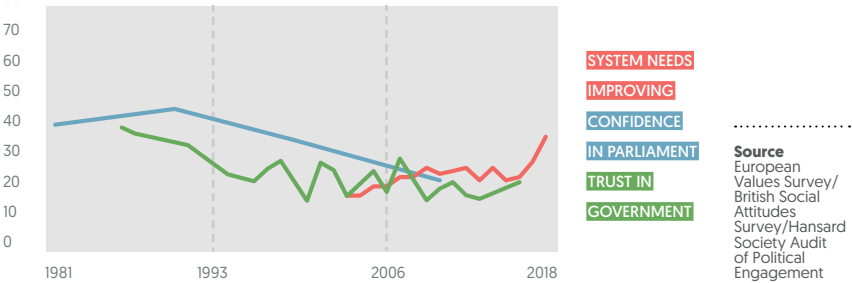
World Values Survey – confidence in parliament, 53 country average
Eurobarometer 1 – trust in government, EU15 average
Latinobarometer – confidence in government, 15 country average
Eurobarometer 2 – trust in government, average of new EU member states and Turkey
Afrobarometer – trust in parliament, 16 country average
Pew Research Centre

Afrobarometer, have also been fairly stable, although with a small decline in recent years.

Since the turn of the millennium, and similar to other aspects of trust, Europe shows a more mixed picture. According to Eurobarometer, of the 18 countries surveyed between 2001 and 2018, eight showed a fall in trust in government overall, but another

SIGNS OF GROWING DISCONTENT WITH THE SYSTEM OF GOVERNMENT IN THE UK ...

How much confidence do you have in Parliament [% great deal/quite a lot, European Values Survey]; How much do you trust British governments of any party to place the needs of the nation above the interests of their own political party [% almost always/most of the time, British Social Attitudes Survey]; Which of these statements best describes your opinion on the current system of governing Britain? [% needs a great deal of improvement, Audit of Political Engagement]



seven showed no change or even a rise – especially in wealthier Northern and Western European countries such as Austria, Germany and Sweden. Europe as a whole also shows recent signs of recovery from the nadir in public trust in government in the post – 2010 period, although this hides individual country variation.

Nevertheless, there are limitations to relying solely on survey evidence to measure trust in government. Long-term trends are patchy and only exist for a few countries, and question wordings are often different, or either emphasise one aspect of trust or leave it undefined. This makes drawing precise conclusions difficult, and can sometimes even lead to what appear to be contradictory results.

A case study: the United Kingdom

The UK is a good candidate for exploring the different trends in trust because of its long history in survey research. One well-known measure of trust in government is the question asked by the British Social Attitudes Survey (BSA): “How much do you trust

British governments of any party to place the needs of the nation above the interests of their own political party?" This question was first asked more than 30 years ago, and shows that the proportion of people who say they trust the government at least most of the time has fallen from 40% in 1986 to 22% in 2016 (although the biggest fall was in the period up to the turn of the century; since the mid-2000s it has been relatively stable, albeit at a low level). The European Values Survey also saw a fall in confidence in parliament in Great Britain over the long term, from 41% in 1981 to 23% in 2010. Furthermore, there is evidence of growing discontent with the political system from the Hansard Society's Audit of Political Engagement, which shows that the proportion of people who think the present system of governing Britain needs "a great deal of improvement" has risen from 18% in 2003 to 37% in 2018.

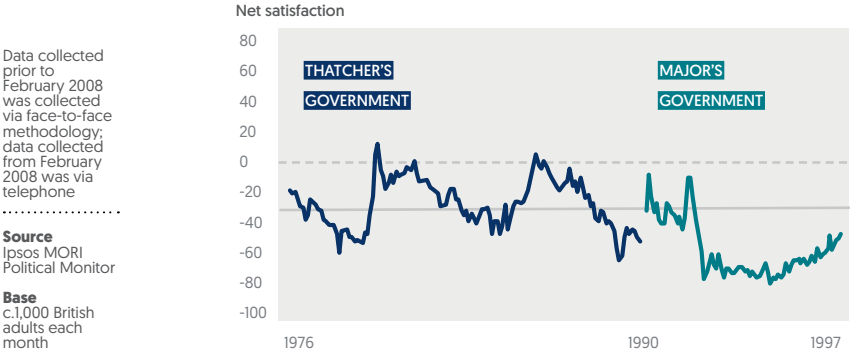
On the other hand, figures from Eurobarometer and the European Social Survey suggest that Britons' trust in government, parliament, political parties and politicians are very similar in 2018 to where they were at the start of the millennium, and indeed show some signs of improvement from lows in the 2009-2011 period. Over the longer term, Ipsos MORI also collects regular monthly satisfaction ratings for how well the government is running the country, which we can use to compare the performance of governments in the eyes of the public over the last 40 years. Comparing these figures seems to show little evidence of declining public satisfaction with British governments – each individual government suffers a fall over its lifetime, but overall the trendline has hardly moved.

Some of the differences between all these measures can be explained by different time periods – there is some evidence of a long-term decline, but little change in more recent years (and even some small signs that the nadir after the financial crash has been passed). Of course there are also differences in question wording and methodology that need to be borne in mind. But it is also important to understand that trust is such a broad concept that it needs to be unpacked – these different measures may be picking up on different aspects of trust.

A classic distinction in political science, first made by Easton in 1965,⁴⁵ is between specific support and diffuse support. Specific

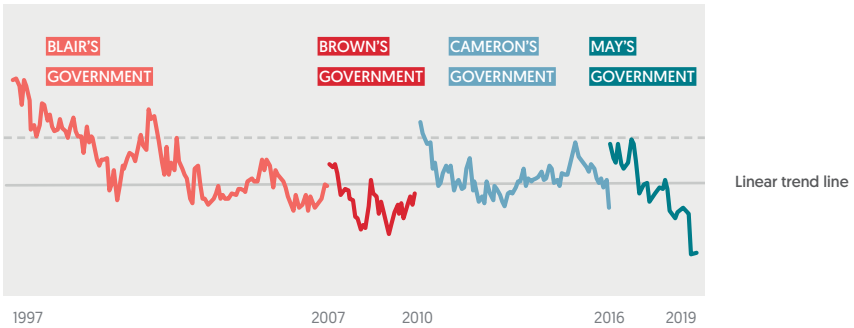
**LITTLE CHANGE IN TREND OF SATISFACTION
WITH INDIVIDUAL GOVERNMENTS SINCE 1979**

How satisfied or dissatisfied are you with the
way the government is running the country?



support measures support for the government of the day and its performance, diffuse support is confidence in the wider political system and its principles. These concepts have been discussed and amended over the years, and a third element [see Jennings et al 2015]⁴⁶ is that of political alienation, which they define as “alienation from the operation of the political system” [for example, through feelings of lack of influence, distrust in the motives of political leaders, that the political system operates by rules that make little sense and are unpredictable, and that the values of the political establishment are seen as fundamentally different to those of some of its citizens]. Thus, the rise in discontent may reflect the ‘system is broken’ sentiment that Ipsos research has shown is related to the rise in so-called populist views around the world.⁴⁷ Simply focusing on ‘a crisis of trust’ in politics does not answer the question of why, nor does it explain if falls in trust are because of failures elsewhere in the way governments are delivering for their citizens.

So there are signs that trust in government has been getting worse in some countries over the long-term, but the picture is not negative for every country. It’s also important to remember that trust in government and politics has never been very high. As we have seen, the first big falls in trust in government were first noted



in the 1970s, along with academic papers with headlines such as Crozier, Huntington, and Watanuki's 'The Crisis of Democracy' in 1975. Across the 20 or so countries in the first World and European Values Surveys (WVS and EVS) in the early 1980s, on average only around half said they had confidence in their parliament.

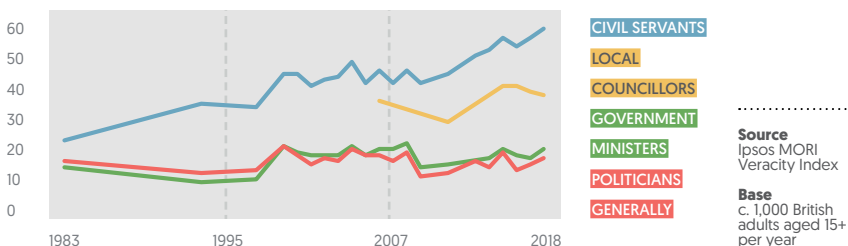
Another example of this is in Ipsos MORI's Veracity Index, which has been running in Britain since 1983. In the very first wave, government ministers and politicians were only trusted to tell the truth by 16% and 18% respectively, putting them right at the bottom of the list along with journalists and trade union officials. In the 2018 survey they again made up two of the bottom three, trusted by 22% and 19% respectively. There have been other movers during that time though, one of which is civil servants, whose trust rating has risen hugely from 25% to 62%. This brings us to another finding from the data which we consider below – trust in different parts of government and politics is not the same.

Trust is different for different institutions

Throughout this report, we have argued that you can't take a blanket approach to trust – you need to be specific about what

**THOUGH TRUST IN POLITICIANS GENERALLY IS LOW
IN BRITAIN, TRUST IN CIVIL SERVANTS IS ON THE RISE**

% trust to tell the truth



aspect you are talking about. This applies to government and politics just as much as for any other institution. There seems to be a pattern whereby local institutions and civil servants are trusted more than elected parliaments and governments, with politicians and their parties trusted least of all. In the latest rounds of both WVS and EVS, the civil service gets the fewest people saying they have no confidence in them at all, followed by government and parliament, rising to around three in ten on average who say they have no confidence at all in political parties. The order is similar in the most recent 2018 Eurobarometer survey, as shown in the chart overleaf, which shows trust is highest for regional/local authorities and public administration, followed by supra-national bodies such as the UN and EU, then national governments and parliaments, and bottom of the table political parties once again.

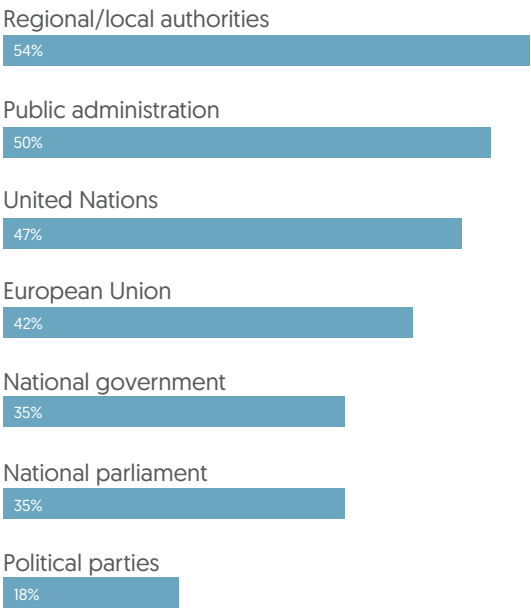
This not only suggests we have to be precise about what we mean when we talk about trust in government, but that we also have to break down our understanding of trust into specific factors to be able to pinpoint why certain arms of government do better than others, and what can be done to improve it.

What drives trust in government?

Analysis of Ipsos' Global Trustworthiness Monitor shows a relatively strong model of the specific factors that are associated with feeling your government is trustworthy. The pattern is similar to the other public and private institutions tested, but is

TRUST VARIES FOR DIFFERENT BRANCHES OF GOVERNMENT

I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it. % tend to trust



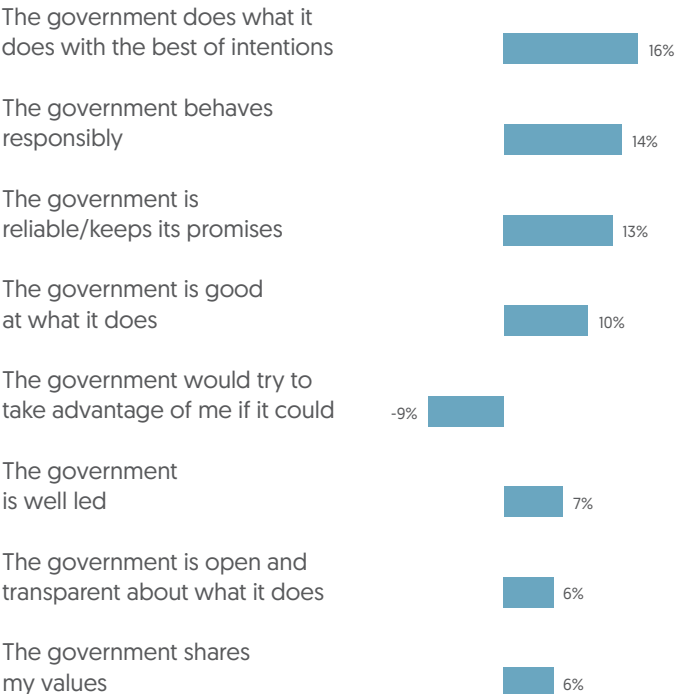
Source
Eurobarometer

Base
32,600
interviews
across 34
countries,
November 2018

more robust for government, explaining more of the variance in people's views. Particularly important are perceptions of a government's intentions, responsibility and keeping its promises, but a range of other factors also make a difference, including its competence and whether it is well led.

There are overlaps between this model and the OECD's framework for understanding citizens' trust in public institutions.⁴⁸ This takes two foundations of trust – competence and values – and identifies five critical dimensions of trust: 1) providing quality public services, and responsiveness to citizens' needs, 2) reliability in the face of

HOW STRONGLY ASSOCIATED ARE INDIVIDUAL FACTORS WITH OVERALL TRUSTWORTHINESS?



$r^2 = 0.48$

Source
Ipsos Global
Advisor

Base
c16,400 online
adults aged 16-
64; 22 countries,
October 2018

changing needs, and minimising uncertainty, 3) behaving with integrity, 4) openness in dealing with citizens and 5) fairness in treating citizens equally and improving living standards for all.

It is also useful to compare how well citizens around the world rate their government on these individual factors compared with the average across eight sectors as a whole (media, public services, technology companies, banks, pharmaceutical, oil and gas, and food companies). As we would expect given its low overall trust scores, government tends to do worse on most of these factors (although it is not seen as much more likely to take advantage of

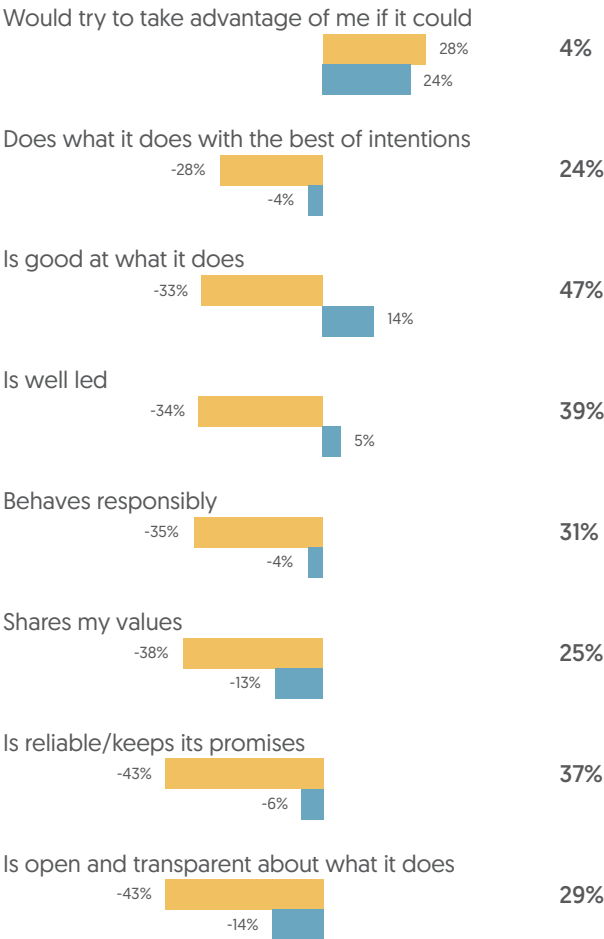
GOVERNMENT PERFORMS BELOW AVERAGE ON MOST TRUST FACTORS, ESPECIALLY COMPETENCE, BEING WELL LED, AND RELIABILITY/KEEPING PROMISES

To what extent, if at all, would you agree or disagree with the following statements about [ORGANISATION]? +/-% net agree

RATING OF GOVERNMENT ON FACTOR

AVERAGE RATING OF 8 SECTORS ON FACTOR

Government performance gap



Source
Ipsos Global
Advisor

Base
c16,400 – 17,800
online adults
aged 16-64 in
23 countries,
October 2018

people than many private sector companies]. But government does particularly badly on three key aspects: being good at what it does, being well led, and being reliable/keeping its promises.

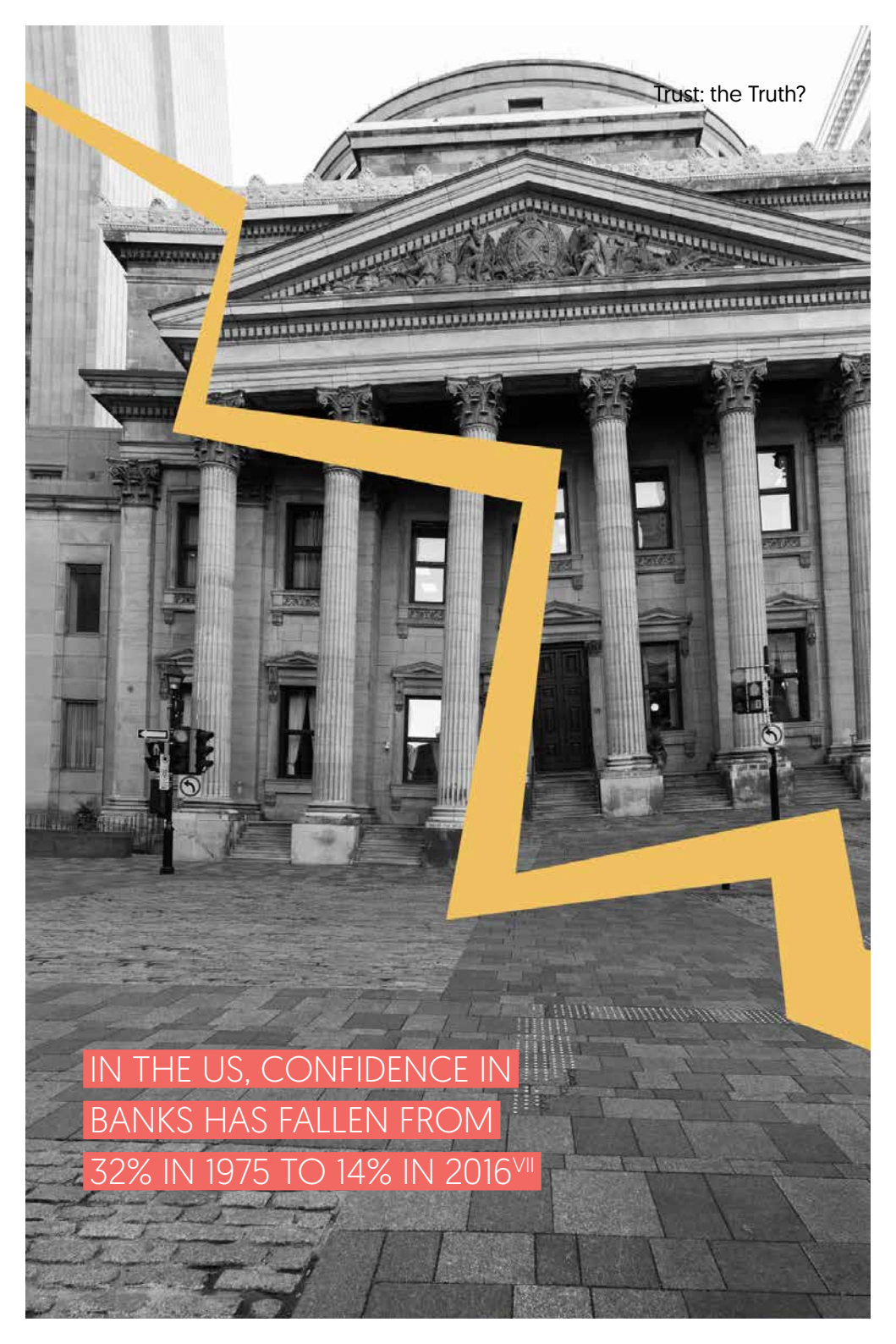
Qualitative analysis by Jennings et al [2015]⁴⁹ also suggests that which factors of trust in politics are most dominant can change over time. Comparing verbatim responses from the Mass Observation Archive from 1945-50 and in 2014, they find that both periods share perceptions that politicians are not straight-talking, out for personal gain, and so on. But in 2014, views of politicians as out-of-touch with ordinary people have become more prominent, with a greater focus on their personality, and concerns about their integrity prompted by the expenses scandal of 2009. Which means that even with long-running time series of survey data, we need to be sensitive to how conceptions of trust, and the factors that drive it, may change.

Conclusion: a long-term issue needing multiple solutions

In conclusion, then, it's no surprise to see politicians and the media regularly talking about the need to rebuild trust in government and politics. Indeed, as this is a decades-old problem, they have been doing so for years. But simply talking in general terms about a crisis in trust isn't enough and is in danger of missing the real reasons why so many people around the world are unhappy with the way their countries are run.

Our analysis shows that the most important steps would be to consider exactly how governments can better deliver outcomes for all their citizens; address public scepticism about their intentions and enhance connections with ordinary people (even if this is always likely to be a feature of modern democracies); and demonstrate that they can keep their promises.

Given a deficit trust has been a chronic condition of modern societies for some time, attempts to address it will need to be consistent and long term. Rather than focusing just on trust as a generic measure, we need to understand exactly why trust and confidence is so low, and why it is better in some countries and for some parts of government than others, if we are to come up with a solution.



Trust: the Truth?

IN THE US, CONFIDENCE IN
BANKS HAS FALLEN FROM
32% IN 1975 TO 14% IN 2016^{VII}

Unravelling trust in the media



UNRAVELLING TRUST IN THE MEDIA

KATHERINE JAMESON ARMSTRONG

Head of Qualitative Research, Media Development

We live in a world of overwhelming amounts of information, 'fake news', opinion, and conjecture, where public conversation has arguably become more polarised and even hostile to the media itself.

Surely, in such a world, trust in the media *must* be in crisis? The answer is, as it so often is, complex.

Traditional media: a good news story?

Industry conversations have for some time been firmly focused on the decreased relevance of traditional media over time. The influence and power of traditional gatekeepers of content has been eroded to a certain extent with the explosion in content sources. Whereas traditional media may have been seen as the voice of authority, this sense of top down production for consumption has been undermined by the internet. In a world where audiences can check multiple sources, they have at least the ability to back up their own conclusions about 'the truth'. There are suggestions

Unravelling trust in the media

that the concept of 'universal truth' may no longer even exist in this environment, where facts are replaced with theories.

However, evidence suggests that trust in traditional media has in fact managed to withstand this challenge over a long period of time. Data collected between 2007 and 2018, shows no significant long-term decline in claimed trust in traditional media. According to Eurobarometer, running since 2000 across 29 countries, over six in ten also say they tend to trust the news they receive from the radio, television, and printed news. This is backed by the Ipsos Veracity Index, where we see that 62% trust television newsreaders to tell the truth in 2018 (with little change in this figure since the index started in 1983). Whilst trust in journalists have always been low (26% in 2018), this had actually gone up +7 ppt overall since 1983. Importantly, our 2018 study 'In Media We Trust'⁵⁰ showed when it comes to trust in print media (newspapers/magazines), trust was consistent across all ages.

That said, while this appears to be a very good news story for traditional media there are indications that 2019 may represent something of a turning point for trust. Ipsos' 2019 Global Advisor survey – run in 27 markets globally – shows that there may be signs of trust in news outlets beginning to wane. The study found that over the past year (2019 vs. 2018) there has been a decline in trust in traditional sources of news and information (including: TV, radio, newspapers, and magazines). It will be important to continue to monitor whether the impact of this continues beyond the past year's shifts in social/political agenda and media narratives.

Importantly, this data presents an overall picture, and does not drill down to individual brands. Our qualitative work in this area suggests an even more complex picture, where traditional media brands are still struggling with the thorny question of trust, with deep rooted tribalism at play. We hear concerns about bias, sources and the distance between traditional media brands and real lives at a local level. Perhaps then, the fact that the media is driving conversation about trust in itself is in part driving perceptions, and its very coverage of the debate about trust also raises questions about its own credibility.

COULD IT BE THAT CHANGES IN ATTITUDES TO DIGITAL MEDIA SOURCES ARE HAVING THE GREATEST IMPACT ON AN OVERALL SENSE THAT TRUST IN MEDIA IS A PROBLEM?

Our 2018 study 'In Media We Trust' showed that globally trust in the media is also correlated with educational levels, those with higher levels of education trusting the media more than those with lower levels of education. We would suggest that this relates to a greater self confidence in ascertaining what people believe to be true or not, but could also be driven by the perception that media brands talk from a position of privilege that does not always reflect the 'person on the street'.

Critical thinking around digital media

When looking at the evidence from long running studies, it is clear that globally, people have tended to trust traditional media more than digital media. The mounting pressure faced by digital platforms such as Google and Facebook has dominated conversations on trust, with initiatives launched to combat this (such as fact-checking and flagging extremist content) being met with varying degrees of scepticism. It is interesting that Facebook has attempted to re-position itself as a technology company, rather than a media provider (i.e. providing products and services as their primary goal, rather than hosting and producing content). However, whether users are taking this on board remains to be seen.

GLOBALLY THOSE UNDER 35 ARE
FAR MORE LIKELY TO TRUST DIGITAL
PLATFORMS THAN PEOPLE OVER 50,
WHILE BABY BOOMERS ARE MORE
LIKELY TO TRUST IN TV/RADIO
THAN MILLENNIALS

In this context, could it be that changes in attitudes to digital media sources are having the greatest impact on an overall sense that trust in media is a problem?

As mentioned in our introduction, as people get more familiar with the internet, they trust it less. The Eurobarometer shows those *not* trusting the internet rose from 31% to 46% in 2006-2017. Twenty-two of the 29 countries measured saw a fall in trust in the internet over that time. In the US, a 2016 Pew study found that trust in information from national and local news organisations is about twice that of trust in information from social media, while research from Reuters shows that in five of seven countries, trust in digital media is lower than public service broadcasters, commercial TV or print.⁵¹

Whilst the digital media world offers significant benefits to audiences in terms of relevance, personalisation and choice, this data suggests a growing sense of awareness that there are trade-offs in terms of certainty. Lower levels of trust in digital communication reflect perceptions of quality and rigour versus traditional media - TV, radio and print – which are expensive to produce.

There is also more nuance to be explored here. There is for example, a global age divide; the young trust digital platforms more than older people. Globally those under 35 are far more likely to trust digital platforms than people over 50, while Baby Boomers are more likely to trust in TV/radio than Millennials.

Elsewhere, there are signs that younger people are increasingly developing a degree of positive critical thinking around trust in online news sources. Ofcom's 2018 report 'Children and parents: Media use and attitudes'⁵² shows that whilst social media sites are a very popular source of news for young teens in the UK, this group also ranks them as the least trustworthy and accurate source. Conversely, they rank TV news most highly against these attributes while more than eight in ten of those who use TV for news consider it trustworthy [85%] and accurate [86%]. There is also an increasing awareness and understanding of fake news, 74% are aware of its meaning as 'false/made up news stories written deliberately to mislead people' vs. 67% in 2017.

Cultural nuance is everything

Finally, we must be very careful here not to make global assumptions about levels of trust in the media. Whilst global digital platforms are making inroads everywhere, the strength and cultural power of the media is often a national and even local issue. Cultural nuance is essential - people's perceptions and relationship to the media is driven by historical levels of trust in their country. Therefore, the power dynamics of the media industry in each market, the extent of regulation, official interference or manipulation also matter.

Certainly, trust in newspapers and magazines vary greatly across individual countries. According to the 2019 Ipsos Global Advisor study, Indians are most likely to trust newspapers and magazines to be a reliable source of news and information with a 55% net trust score. Serbia and Hungary are least likely to trust newspapers and magazines whilst the UK sits at the global average, with trust and distrust in newspapers and magazines about even [1% net trust].

Globally, consumers are more likely to trust television and radio [net score +4% points vs. newspapers and magazines] as a news source. This is particularly true in the UK which has a 32% net trust score for television and radio, a traditional pattern reflecting stronger rules for impartiality on broadcasters than print media.

WHERE THERE IS A DECLINE IN TRUST,
PERCEIVED OR ACTUAL, WE SHOULD VIEW
THIS AS AN OPPORTUNITY FOR MEDIA
OWNERS TO RE-NEGOTIATE THEIR OWN
RELATIONSHIPS WITH THEIR AUDIENCES

There appears to be an issue with trust in established markets, focused on digital platforms. Emerging markets, like Indonesia, have marginally higher levels of trust, but also more people who say their trust in the media has grown in the past five years than say it decreased. The reverse is true in established markets where the share of people who say they trust media less than they did five years ago exceeds the share of those who say they trust it more by -15 points. It is important to note here that this decline is self-claimed and doesn't show up in trend data – we just *think* our trust in the media is in decline. That in itself, as with our general obsession with 'trust' is important as a reflection of our anxiety.

Above all, the US is bucking the trend, and because of its cultural dominance, this may in part explain media interest in trust globally. The General Social Survey shows a significant decline in confidence in the press. In 1973 only 15% had 'hardly any' confidence in the press, but this has risen steadily to 50% in 2016. Indeed, the Ipsos Global Advisor survey supports the reduction in level of trust in the US. In one year between 2018 and 2019 trust that print (newspapers and magazines) and TV and radio, were a reliable source of news fell by 10% points each to just half of the US population (51%) respectively.

We also need to explore the link that satisfaction with the media may have with socio-political change. Global research from the Pew Research Center finds a strong correlation between satisfaction with the media and trust that the government will do

what is right for its country.⁵³ The gap is largest in Vietnam, Sweden and the UK. In the US, there is no difference in media satisfaction between those who trust the government and those who do not.

So where to next?

So, there has not been a long term, global crisis of trust in all media. Where there is a decline in trust, perceived or actual, we should view this as an opportunity for media owners to re-negotiate their own relationships with their audiences. People are consuming more media than ever, across more channels than ever before – mass media's role in society has hardly diminished.

We also need to be mindful of the evolving context. There has been an increase in conversations around trust in media, which may see a significant shift in the data for 2019. The evolving context with the acceleration of AI (e.g. the impressive face swapping technology such as 'deep fakes') and the shift toward 'virtuality' (and the virtual economy) means the online and offline worlds are blurring – and audiences may find it harder and harder to know who or what to trust.

Media brands cannot simply stay as 'traditional' offline propositions to gain trust – as we know their relevance is waning. However, there does seem to be a real opportunity here for long standing media brands to stake and provide a stamp of trust in an increasingly murky and blurry virtual world. Record circulations for titles like the Financial Times and the Washington Post, that invest in quality, in part reflect a search for 'real' news, not fake news.

There is clearly a role for media owners to be more transparent and more honest about how they work and how they are funded. Digital brands need to address the issue of trust head on with more transparency, better tools and a renewed sense of purpose.

The most trusted profession?



THE MOST TRUSTED PROFESSION?

MELISSA LEVY

Senior Research Executive

RACHEL SANDFORD

Associate Director

In a world where trust is supposedly in crisis, the vast majority of us say we trust our doctors to tell the truth [92% in the UK].⁵⁴ Doctors are among the most trusted professions [second only to nurses at 96%]⁵⁵ and have consistently been at the top of the tree year after year. But do we really trust them as much as we say we do? Our actions may suggest otherwise.

There is no doubt that trust matters. There is evidence that it can have a significant impact on treatment outcomes. Adherence to medical regimes is often linked to trust in a patient-doctor relationship. If a patient does not trust their physician's advice or treatment decisions, this can cause poor adherence, resulting in poor outcomes. Adherence rates have been found to be three times higher in primary care relationships where high levels of trust are coupled with the physician's knowledge of the patient.⁵⁶

However, the world is changing. The healthcare system looks very different now than it did only a decade ago. We are moving away from the traditional one-way, unequal doctor-patient relationship, towards a more balanced conversation. There are two main factors

The most trusted profession?

AS PATIENTS EDUCATE THEMSELVES
MORE ABOUT THEIR OPTIONS,
THEY ARE ABLE TO PLAY A MUCH
LESS PASSIVE ROLE IN THEIR
TREATMENT DECISIONS

influencing this; a greater patient ownership of both our health and health data, and the loss of the 'family doctor'.

Patients are now better able to seek a second opinion when they are dissatisfied with the advice they receive. Patient support groups, patient associations, and 'Dr Google' are all ways in which patients (especially those with chronic conditions) can educate themselves on their treatment options. This is particularly prevalent in HIV where there is a strong community element to the condition; friends talk about their medications and often deliberately take the same ARVs (anti-retrovirals) as each other, while patient support groups offer up to date information about novel treatments to consider.

We are also monitoring our own health more than ever, with one in ten participants in our latest Global Trends Survey actively using a connected health device.⁵⁷ As patients educate themselves more about their options, they are able to play a much less passive role in their treatment decisions.

The nature of general practice is also changing. Historically a GP would look after a whole family, from grandparents to grandchildren, understanding their shared medical history, social background, and economic situation, thus enabling them to act

OUR STUDIES HAVE SHOWN THAT PATIENTS' LEVEL OF TRUST IN PHYSICIANS CAN VARY DEPENDING ON THEIR ROLE AND LEVEL OF PERCEIVED EXPERTISE

as a trusted advisor as much as a physician. Nowadays it can be a rarity to see the same GP more than a few times, let alone share them with other members of your family. Telemedicine has played a role in this, with 34% of doctors surveyed in the UK reporting having used telemedicine for remote consultations in 2017.⁵⁸

Our studies have shown that patients' level of trust in physicians can vary depending on their condition and the professional's role. For example, patients with long-term conditions can sometimes have lower levels of trust in their GP, and are more likely to see GPs as 'gatekeepers' to specialist care. And while specialists are seen as experts in their field, the overall relationship may still not be a close one, due to the infrequency of contact. For this reason, specialist nurses are often trusted above all. They have a more personal relationship with the patient, as well as expert knowledge on the day-to-day realities of a disease, beyond that of the specialist doctor. For example, stoma* nurses are able to assess a stoma and identify exactly which product would work best for that specific patient in a way that the surgeon would not.

Despite all of this though, overall trust in doctors (and particularly GPs) remains high. And results from the GP Patient Survey back this up; 96% of patients in 2018 said that they had confidence and trust

*A stoma is an opening on the abdomen that can be connected to either your digestive or urinary system to allow waste (urine or faeces) to be diverted out of your body.⁵⁹

The most trusted profession?

PATIENTS STILL NEED TO BE
EMPOWERED TO SPEAK UP DURING
THEIR APPOINTMENTS AND
EQUIPPED WITH THE RIGHT
TOOLS TO DO SO EFFECTIVELY

in the healthcare professional they saw at their last appointment, including 69% who said they definitely did.⁶⁰ Qualitatively, patients tell us that while they want to be involved in decisions about their own care, they rely heavily on the doctor's opinion and advice. While they might be taking more ownership of their health, this doesn't mean that they trust their doctor any less.

So, yes, the world is changing, the health landscape is changing, patients are changing, but amongst all of this is one constant – our trust in our doctors.

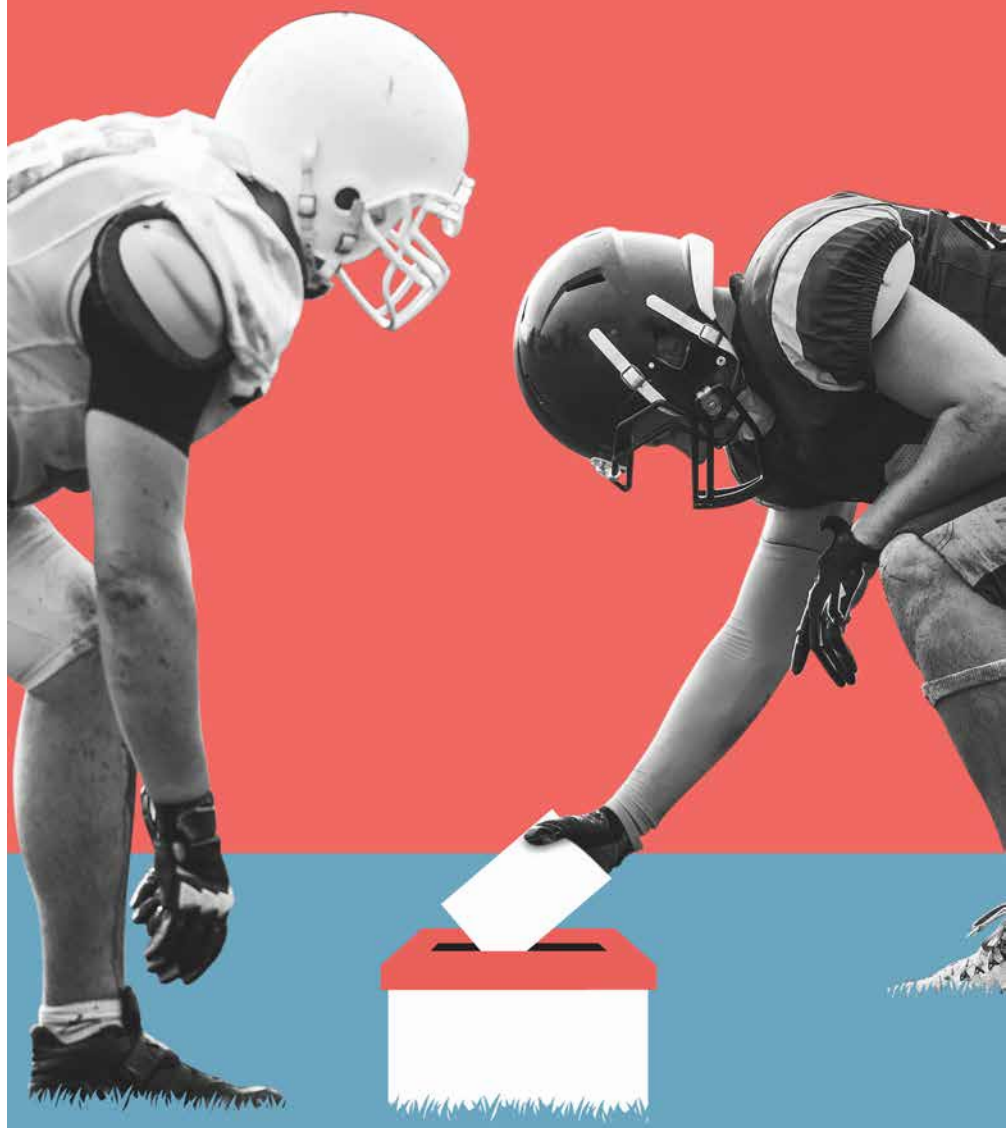
Trust: the Truth?

OVER SIX IN TEN EUROPEANS
TRUST THE NEWS THEY RECEIVE
FROM THE RADIO, TELEVISION
AND PRINTED NEWS.

BUT ONLY HALF TRUST ONLINE
NEWS, AND JUST A QUARTER
NEWS FROM SOCIAL MEDIA^{VIII}



Distrust and tribalism in the US



DISTRUST AND TRIBALISM IN THE US: THE DRIVERS OF OUR AGE OF UNCERTAINTY

CHRIS JACKSON

Vice President, Ipsos US Public Affairs

MALLORY NEWALL

Director, Ipsos US Public Affairs

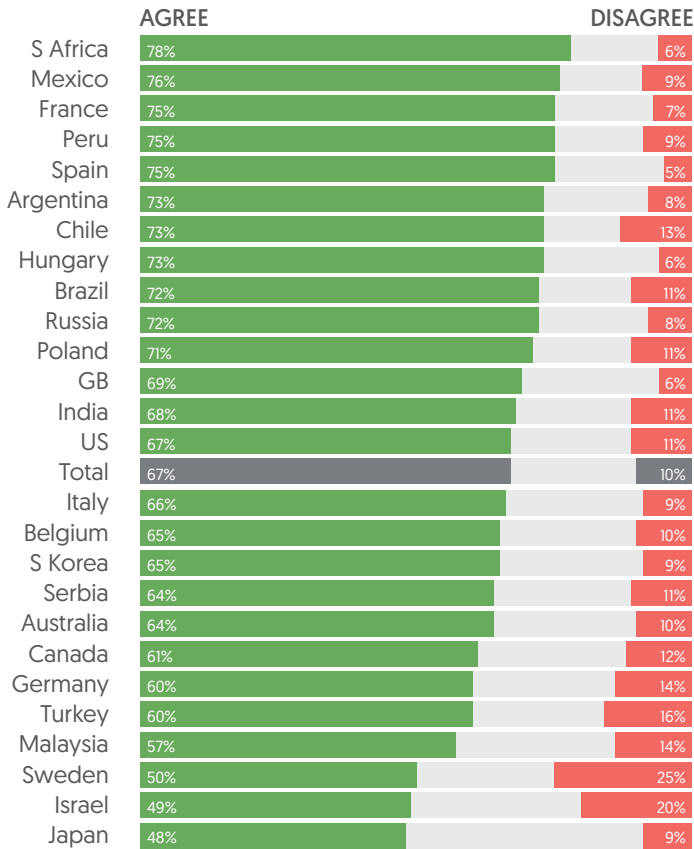
People could be forgiven for thinking that much of the western world is in a state of dysfunction. Media is rife with references to failing governments, unscrupulous businesses, social protests, and global problems. Focusing on the United States highlights the challenges as the country struggles to deal with events ranging from the Great Recession, to Black Lives Matter, to the election of Donald Trump. At Ipsos, we call this moment 'Our Age of Uncertainty', based on a depth of research with the public in various countries around the world. Our analysis indicates that this era of instability is characterised by the long-term chronic decline in public confidence in institutions and the increasing power of more tribal loyalties.

Long-term decline in trust

Trust did not start decaying in the US yesterday, nor has this decline impacted just one area of society. The current low levels of trust and confidence – in government, business, the media, other institutions, and each other, as discussed elsewhere in this report –

DISSATISFACTION WITH THE ELITES AROUND THE WORLD

“Traditional parties & politicians don't care about people like me”



Source
Ipsos Global
Advisor

Base
Online sample
of 20,019 adults
aged 16-64 in
28 participating
countries,
22 February -
8 March 2018

began falling five decades ago and have remained at historically low levels for the last decade. Trust has fallen but is not in constant freefall. As an example, according to the Pew Research Center, the average proportion of Americans who trust the government in Washington always or most of the time has stayed within the 17-21% range since 2011.

While academics have established there is a decline in public trust, they have not reached a consensus as to the cause. Suggested causes include a whole range of demographic, social, cultural, and political changes. Many of these are long-term issues, such as different generational values, change in the ethnic makeup of America, immigration, a fractured information landscape, economic inequality, changing power structures (as discussed in Moses Naim's 'The End of Power') and so on. All these lead to opportunities for anti-system political actors such as Donald Trump or Bernie Saunders, the growth of 'alternative facts', and an associated driver of this age of uncertainty: growing tribalism in a post-global world.

Trust as the immune system

In a healthy society with robust levels of trust, people assume that others will hold up their ends of the social contract, are less likely to listen to divisive claims, and are more likely to allow space for change. Solving difficult, complex problems in society requires robust trust between the governed and the governing, where the former are willing to give up something now in exchange for the promise of a benefit later. At this moment (and arguably since the mid-2000s), most Americans do not trust political elites to honour their promises.

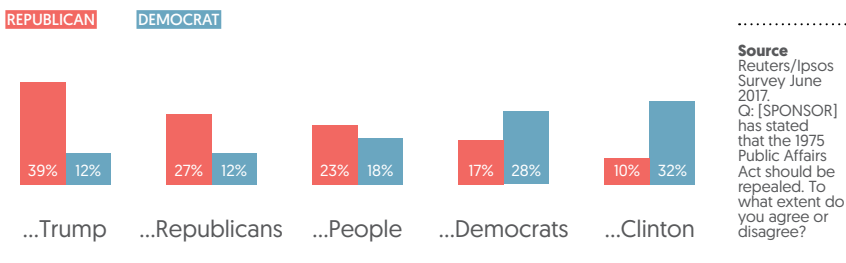
One consequence of the shortage of trust in elites is that people turn to other groups of people they have more in common with, sometimes termed 'alternative' authorities. These 'tribal' alternatives can vary widely and are largely social constructions emerging from shared histories or shared goals.

Psychology of tribalism

This new tribalism is powerful because it builds on how our brains are wired. People do not actually make carefully reasoned political decisions. [See for example Jonathan Haidt's work, or the concept of 'hot cognition', defined here as a person coming to a summary judgment without considering alternative information. Hot cognition occurs when strong emotive responses to stimuli short-circuit reasoned decision-making⁶¹]. The reality is that people look for shortcuts in decision-making in politics, as in their consumer decisions. Politics and governance are highly complicated and

DIFFERENTIAL CREDIBILITY AND RISE OF ALTERNATE FACTS

% who support the repeal of the 1975 Public Affairs Act
when repeal is endorsed by ...



abstract. Most people do not need to, or want to, spend a great deal of time thinking about it to be successful in their day-to-day life. Therefore, rather than expend the rather significant mental energy to become experts on all facets of governance, most people look for signifiers to make quick decisions. One of the most frequently used cues is tribal identity. Essentially, if a person identifies with a group of people strongly, they generally trust other members of that group, and a representative of that group who had a clear opinion would be trusted to represent all others.

The power of tribalism can be seen in the rise of what we call differential credibility, where credibility or legitimacy is derived from association with one's tribal colours or 'cues'. Recently, we ran an experiment at Ipsos which reinforces this point. In it, we asked respondents if they supported or opposed the 1975 Public Affairs Act. This bill is fictitious. The findings are striking and illustrate the impact of trust and partisanship on communications. Independent of the merits, Republicans are much more likely to support the bill if it was linked to Trump, and Democrats the same if associated with Clinton. Such cues of source credibility are key, and they litter our political landscape. Merit or fact is less important than packaging.

The weaponisation of tribalism

The loss of popular trust and the tribalisation of loyalties makes society more susceptible to fear, division and instability. Political and media entrepreneurs [defined as people using strongly

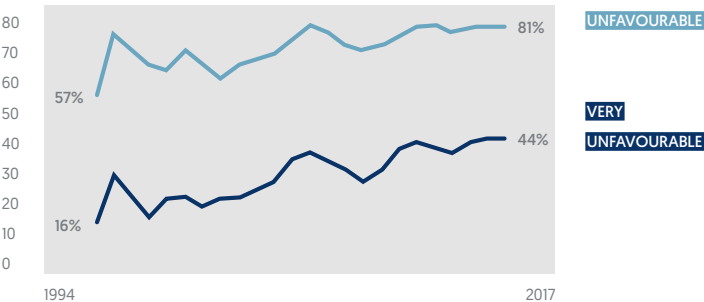
political rhetoric for personal advancement] have seized on these low levels of trust to promote themselves by weaponising tribalism. Many prominent figures understand that fear and anger are quick ways to mobilise people into action and build cohesive bases of support. Some have focused on stoking fear and anger towards the 'other' in societies. In the United States, the main tribal dividing line has become partisan identification with a subtext of race or ethnicity. This deployment of tribalism has a clear example in the election of Donald Trump, his effective priming of his Republican base, and ongoing trolling of his Democratic opponents (and even further afield, including the Mayor of London, Sadiq Khan, which has been echoed in the UK).

We should make clear the difference between partisanship and this more caustic form of tribalism. Partisanship is not in itself a bad thing. Taking a side or voicing an identity is a vital part of exercising democracy. What has changed in recent years is the rise of a hostile and tribalised negative partisanship, and even hatred of the 'other side'. Over the past two decades, the number of Americans voicing an allegiance to the Democratic or Republican party is mostly unchanged. However, over the same time period, the percentage of people who express strong antipathy towards people from the other party has more than doubled. This hostility is the natural outcome of the countless hours of political entrepreneurs attacking opponents in personal and moralistic language. People on the other side are increasingly seen as not just having differing beliefs, but as being fundamentally morally wrong. In an environment where your opponents are 'evil', how does reasoned debate or compromise happen? There are also some signs of this happening in other countries. For instance, in Britain we have seen the same pattern with Brexit going from an issue that concerned fewer than one in ten people in 2015 to the defining line of British politics. It has brought together different sociocultural trends to polarise British politics into Leavers versus Remainers with opponents called 'mutineers', 'traitors', and worse.

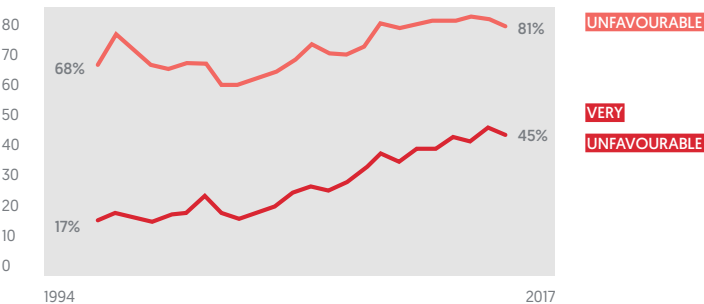
The risk is that societies with low levels of trust and strong negative partisanship are caught in a negative feedback cycle. These two social forces reinforce each other and make it increasingly difficult to either build trust or a more positive form of tribal identity.

SIGNS OF GROWING POLARISATION IN THE US

% of Democrats and Democratic leaners who have a ... opinion of the Republican Party



% of Republicans and Republican leaners who have a ... opinion of the Democratic Party



Data shown are yearly averages

Source
Pew Research Centre. Survey conducted 8-18 June 2017

What this means for societies

Not all societies are equally affected by our current divisions. However, this dynamic of weak institutional trust, mass media-driven divisive rhetoric, and tribalisation of societies is a risk everywhere. We must not exaggerate divisions. However, the new online, self-created echo chambers people can now inhabit, where partisan messaging circulates far faster than ever before, create new challenges. It means antagonistic tribal identities continually reinforce themselves, and anyone trying to bridge divides can find it even harder to break through. Countries that still have

THIS NEW TRIBALISM IS POWERFUL BECAUSE IT BUILDS ON HOW OUR BRAINS ARE WIRED

robust levels of institutional trust should safeguard that through good governance and transparent corporate social responsibility. Countries trapped in the negative feedback cycle have a tougher road. The path out for them is much harder to see.

These levels of disjunction will require generational change or a major external shock to break down. They are unlikely to be resolved as a result of a single election or change in government. The challenge for everyone interested in promoting healthy societies will be plotting a course through this instability back towards a healthy world. This path will centre on building and reinforcing trust and positive relationships between groups and institutions. Understanding how we got here is the first step.

WHAT CAN INDIVIDUALS DO?

There are small steps we as individuals can take to mitigate this growth in negative partisanship. Start by actively unfiltering your own media consumption and listen to the arguments of 'the other side'. Try to avoid the assumption that everything is getting worse – as Hans Rosling and Steven Pinker demonstrate, it is not. Call out fake news with hard evidence whenever you see it. Above all, do not assume you are 'normal'. If you are reading this report you are almost certainly not.

SECTION 3

TRUST IN BUSINESS

Trust and business



TRUST AND BUSINESS

CARL PHILLIPS

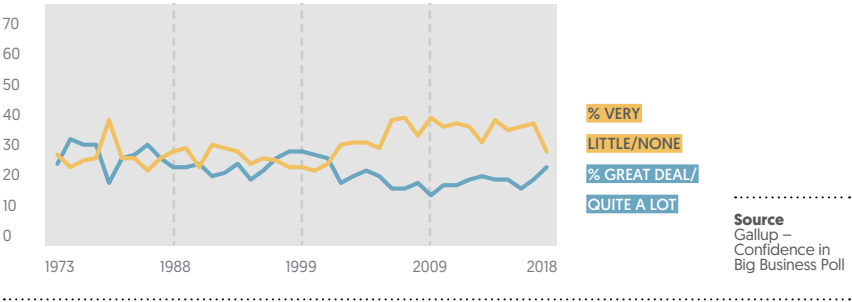
Research Director

The widely accepted ‘narrative’ is that public trust in business is broken and getting worse. This has been the established ‘truth’ for several years now and has been supported by a wide range of publications, academic institutions, and consultancies, as well as headlines. The LSE’s Business review, for instance, points out that the value of trust, that we all “depend in our social, business, financial, and political affairs” has been devalued. The 2017 Edelman Trust Barometer press release claimed that “trust is in crisis around the world”. This narrative extends to all sectors – business, government, NGOs, and media.

Intuitively, of course, the crisis narrative feels right, which is no doubt why it has been accepted so widely. How could the many corporate scandals of the last 20+ years in various sectors have not dented levels of public trust more generally? This is especially plausible when you overlay the major changes in the media landscape that have occurred over the last forty years – starting with the advent of 24-hour news in 1980 and culminating in the current social media landscape. Together, these factors have created an environment where public scrutiny of companies has

CONFIDENCE IN BIG BUSINESS IN THE US

% saying they have confidence in 'Big Business' – US



never been easier, and rolling news ensures that reputational crises are not easily, and quietly, dealt with.

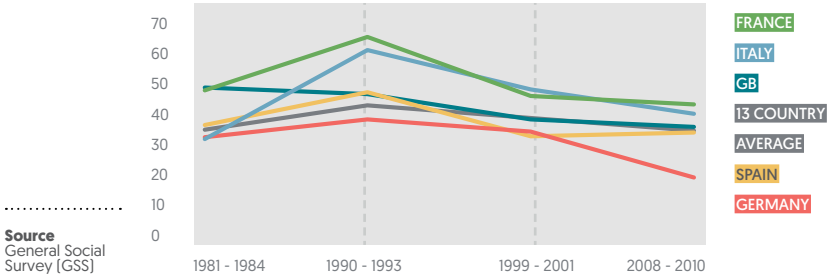
But is this narrative of broken trust in business really borne out by the evidence? If it is, we would be able to see clear evidence of ruptures in long-term trust or confidence in business trends. Of course, this way of thinking infers a direct link between trust in individual businesses or sectors and trust in business in general. But judging by the available evidence, this link does not hold that well. When we zoom out from specific companies or sectors and take the long-term view, we predominantly see periods of stability – including over the last decade – punctuated by times of change [notably a decline around the turn of the century]. That said, the story is not necessarily a positive one, so the accepted narrative is at least partially correct.

A crucial caveat is that long-term trends in trust specifically are few and far between, which forces us to look at trends for other, similar concepts such as confidence in business as a proxy for trust in business. While not perfect, the interconnectedness of the two concepts is such that any change in one will likely be mirrored [directionally rather than exactly] in the other.

Let's start in the US where Gallup has been running its Confidence in Business tracker since 1973. Over the period 1973 – 2008,

EUROPEAN CONFIDENCE IN MAJOR COMPANIES

% saying they have confidence in major companies – Europe



confidence in big business [% a great deal/quite a lot] has fluctuated from a high of 34% in 1975 to a low of 16% in 2009, although the year on year changes have been small and only twice being greater than 4 points. Over the same period the proportion of people who say they have very little or no confidence in business has fluctuated similarly, with similar, low levels, of year on year changes. Crucially, in 2001 those with very little or no confidence in business started to dominate, and they have outnumbered their more positive counterparts ever since. Clear evidence of the accepted narrative? Partially, yes, a negative viewpoint is certainly stronger than positive, but this has been the case for nearly 20 years with no significant change – certainly attitudes towards business are not getting worse. A very similar pattern can be seen if you examine the “confidence in major companies” data (also starting in 1973) collected as part of the General Social Survey, or GSS, run by NORC at the University of Chicago. It’s also worth noting that since the late 1990s Gallup has consistently found a clear majority say they have confidence in small business, at least twice and even three times the number who say they have confidence in big business, and this trend shows no sign of decline over that time [if anything, a marginal improvement].

Looking at the European Values survey data [% a great deal/quite a lot, confidence in major companies] shows a similar trend to the US – from a high in the early 90’s to a more negative position

EDELMAN TRUST BAROMETER

Trust in business - top 4 box of 9 point scale

INDUSTRY	2015	2016	2017	2018	2019
Technology	74	75	76	75	78
Automotive	67	61	66	62	69
Entertainment	64	65	65	63	68
Food and Beverage	64	65	68	64	68
Healthcare	-	64	67	65	68
Telecommunications	60	61	64	64	67
Consumer packaged goods	61	62	64	61	65
Energy	57	59	63	63	65
Financial Services	49	53	55	55	57
Global Business	57	53	52	52	56

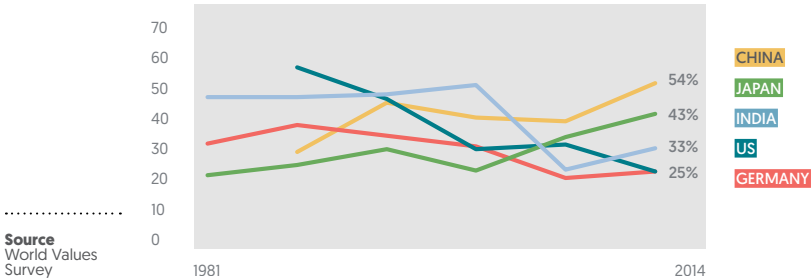
Source
2019 Edelman
Trust Barometer.
9-point scale;
top 4 box,
trust. Industries
shown to half
of the sample.
General
population,
23-market
average

today. In Europe there does seem to be more evidence to support the narrative of a decline in trust, certainly in Germany confidence in major businesses has nearly halved between the early 90s and the late 2000's, and other countries such as France and Italy have also seen a sharp decline. However, although there is a decline on average since the early 1990s, some countries are stable (such as Norway and Ireland), and others even see some improvements, such as in Denmark and the Baltic states.

Edelman's own figures also show that there has been little change when it comes to levels of trust in global business over the last five years. Even when breaking it down further to look at individual sectors, the story is one of stability rather than decline.

CONFIDENCE IN BUSINESS VARIES AROUND THE WORLD

Confidence in major companies – a great deal/quite a lot



Despite this it is certainly possible to find data that challenges this picture of stability or gentle decline. For instance, looking at confidence in business across China, Germany, India, Japan and the US using data from the World Values Survey tells a different story where the US opinion is much more volatile and German opinion is far more stable.

What does this mean for our understanding of trust and how it has changed over the last few decades? Critically it seems to indicate that trust in business is not in constant freefall around the world as some people may assume – it has periods of stability (even sometimes rises) and different patterns in different countries, and this is despite sectors like banking and technology experiencing major problems with trust during the time periods we are looking at. Furthermore, it looks like the major shift in opinion, from being generally more positive to being generally more negative, towards business happened nearly 20 years ago rather than recently, and that since then opinion has changed little.

This stability could well reflect the idea that the system represented by 'business' is still seen as trustworthy, despite parts of it failing periodically. After all, companies build trust daily with their customers through routine interactions, and the vast bulk of businesses are competent and trustworthy in their actions.

So, despite the scandals that have rocked individual companies, and entire sectors, over the past 40 years, trust is more stable

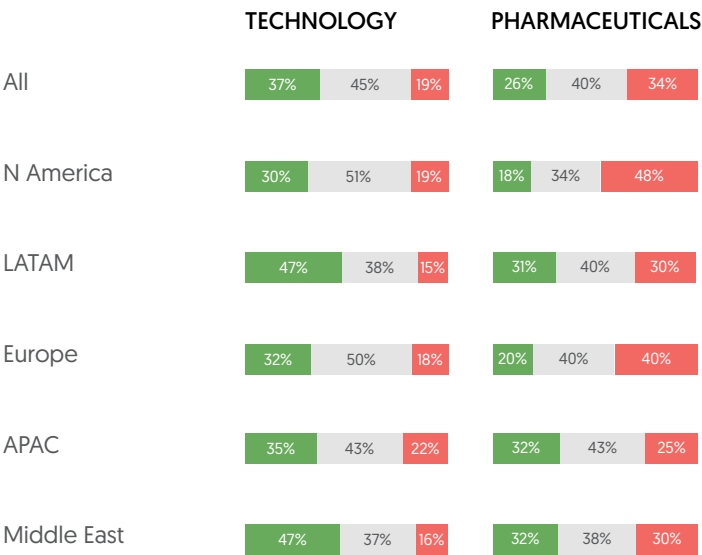
PLEASE LOOK AT THIS LIST OF DIFFERENT TYPES OF ORGANISATIONS AND INSTITUTIONS. IN GENERAL, DO YOU THINK EACH IS TRUSTWORTHY OR UNTRUSTWORTHY?

Please use a scale of 1 to 5, where 1 is very trustworthy and 5 is very untrustworthy.

TRUSTWORTHY

NEUTRAL/DON'T KNOW

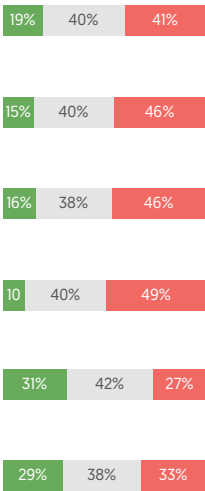
UNTRUSTWORTHY



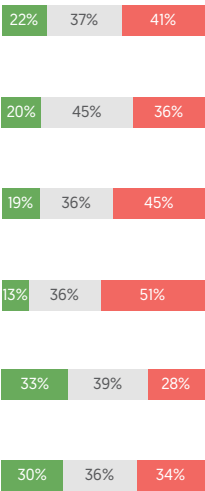
than most of us might have believed. In fact, while it is tempting to regard trust as unstable, and that we are in the midst of a burgeoning trust crisis on the macro level, the evidence does not seem to be there.

That said, it is certainly true that, right now, the public across much if the world is more likely to say that major industry sectors are untrustworthy than trustworthy. Using data collected from the Ipsos Global Trustworthiness Monitor we can look across the world and see not only where different sectors are seen as trustworthy (or not) but also how they perform across the eight factors that we believe are critical to any proper understanding of this metric.

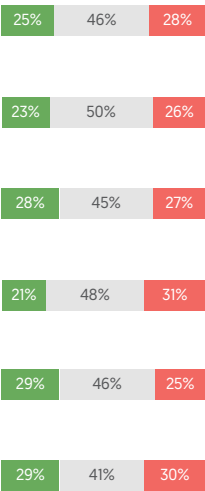
OIL & GAS



BANKING



FOOD & DRINK



Source
Ipsos Global
Trustworthiness
Monitor

Base
19,782 online
adults age 16-64
across 27 coun-
tries, 26 Nov - 7
Dec 2018

Let us start with trustworthiness overall. The most notable finding is that despite a genuine annus horribilis (otherwise known as “techlash”) the technology sector is the only one of the five sectors measured which is rated as more trustworthy than untrustworthy. That said, two fifths (45%) of the public on a global level opted for the mid-point on the scale, or did not know, suggesting that a sizable minority are neutral or have yet to make up their minds.

The picture for the other sectors is bleaker – from a global perspective, more people see the Pharmaceutical, Oil & Gas, Banking and Food & Drink sectors as untrustworthy than trustworthy. It is little wonder, therefore, that the narrative tends to

TO WHAT EXTENT, IF AT ALL, WOULD YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT [SECTOR]?

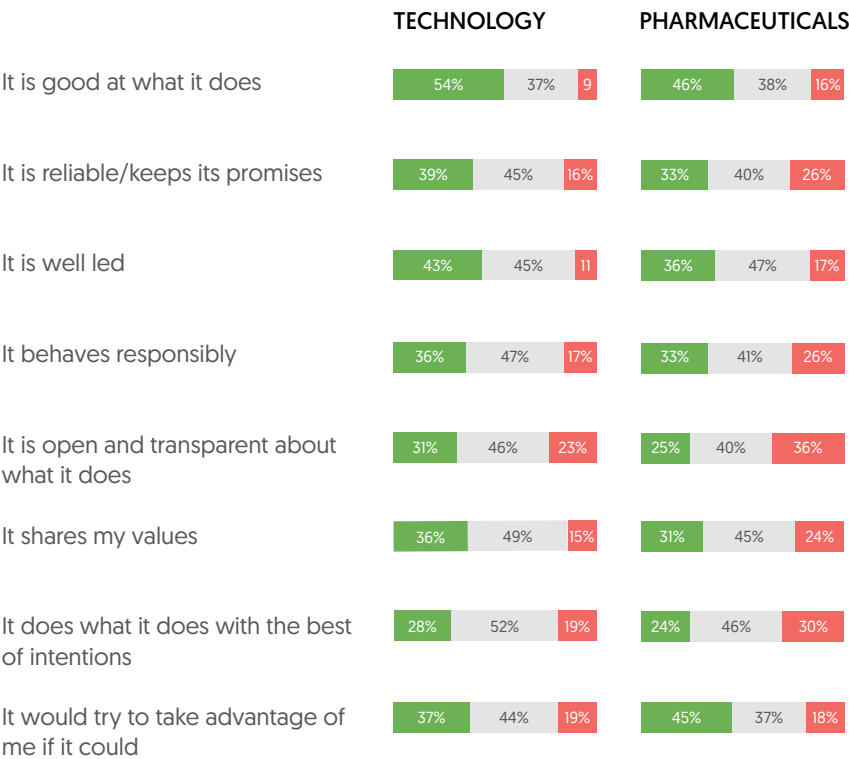
Strongly Agree and Tend to Agree = Trustworthy.

Tend to Disagree/Strongly Disagree = Untrustworthy.

TRUSTWORTHY

NEUTRAL/DON'T KNOW

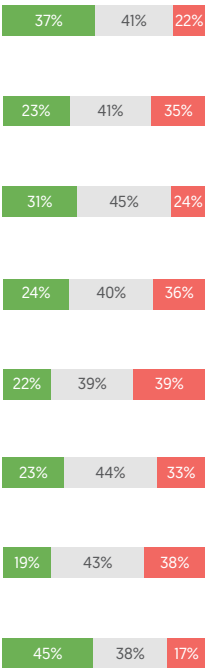
UNTRUSTWORTHY



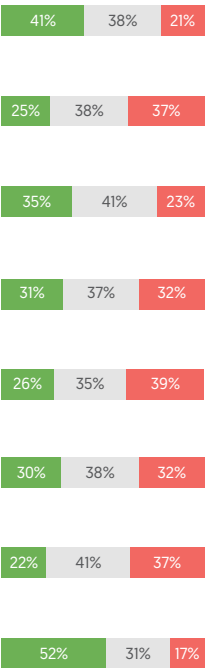
be one of “crisis in trust”. Global averages also conceal substantial regional differences that need to be highlighted.

Firstly, it is certainly true that attitudes in North America and Europe to the Oil & Gas, Banking and Pharmaceutical sectors is poor – all three are seen as far more untrustworthy than they are

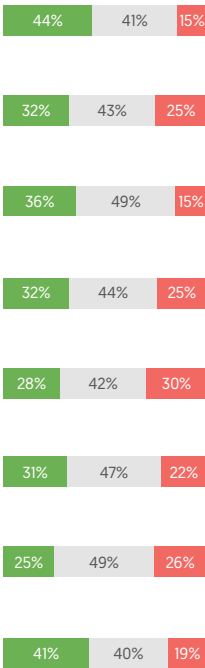
OIL & GAS



BANKING



FOOD & DRINK



Source
Ipsos Global
Trustworthiness
Monitor

Base
19,782 online
adults age 16-64
across 27 coun-
tries, 26 Nov - 7
Dec 2018

trustworthy. The Food & Drink sector, while not attracting the same level of opprobrium, is still net-negative when the public rate its trustworthiness. There is some variation in attitudes between North American and Europe; the Europeans rate the Banking sector more negatively than North Americans do, while the reverse is true for the pharmaceutical sector. Neither is surprising given the profile of

the pharmaceutical sector in North America (especially the US) and attitudes to the banking sector in Europe post-2008.

In direct contrast are the APAC countries where each of the sectors measured is regarded as more trustworthy than untrustworthy. Some of this is cultural difference – the region contains several countries where it is 'normal' to rate companies and sectors more positively than other parts of the world. Furthermore, the online nature of the sample may also mean that more educated groups are interviewed in those countries, who may be more trusting. That said, the largest group in the population prefers to express neutrality than a positive or negative opinion on each of the five industry sectors.

The tech sector aside, the story in LATAM is interesting. While LATAM respondents see Banking and Oil & Gas as untrustworthy, for the other sectors the population is evenly split between positive and negative views.

So, what is going on? Why is the tech sector, despite the cascade of negative media attention over the past 18 months, still seen as more trustworthy than these other sectors? Perhaps it is the accumulated baggage that these sectors have, given their age relative to the tech sector, that is dragging their scores down? Or perhaps they simply lack the profile of the tech sector?

Looking at how the tech sector performs across the trustworthiness drivers goes some way to explaining why tech leads the other sectors. Simply put, the tech sector out-performs the others on every metric measured – they are comfortably the sector most regarded as being good at what it does and being well led. Furthermore, and despite their year of bad press on this issue, fewer people agree that the tech sector would try and take advantage of them than with the other four sectors measured.

Potentially more interesting, though, is that while many people were unable to give an answer one way or the other across the tech sector's trust drivers, the sector also has, relative to the other sectors at least, very few people disagreeing with any of these metrics. That the tech sector is open and transparent about what it does, its worst score, was disagreed with by only 23%, while the

WHATEVER PEOPLE MAY
THINK OF THEM FROM A
MORAL VIEWPOINT, ALL THESE
SECTORS ARE VERY SUCCESSFUL
FROM A FINANCIAL PERSPECTIVE

other sectors all have scores above 30% on at least one metric. Oil & Gas and Banking both have five.

Simply, when it comes to two core areas that drive trustworthiness, role competence and reciprocity, the tech sector outperforms their older peers on a global level.

Looking across the trustworthiness drivers for the other four sectors is revealing. While none reach the same levels of performance as the tech sector, around two-fifths agree that these sectors are good at what they do, and around a third agree that they are well led. This is unsurprising given that, whatever people may think of them from a moral viewpoint, all these sectors are very successful from a financial perspective. Clearly, role competence is not their issue.

Where things begin to be problematic for these sectors, and Oil & Gas and Banking in particular, is their behaviour, especially in their relationship with the public. Firstly, over a third disagree that these two sectors act with the best of intentions, share the same values as the public or behave responsibly. Secondly, a third disagree that either sector keeps its promises, while even more (45% and 52% respectively) agree that the Oil & Gas and Banking sectors would try to take advantage of them if they could. On top of that, neither are regarded as open and transparent. Clearly, both sectors have multiple, overlapping issues that are dragging down their trustworthiness scores.

The Pharmaceutical and Food & Drink sectors outperform Oil & Gas and Banking because they have fewer weaknesses. For both sectors their key areas of negativity, where disagree outweighs agreement, relate to transparency and the belief that they would take advantage of the consumers if they could. However, both are net positive when it comes to sharing values, behaving responsibly and keeping promises – all issues that Oil & Gas and Banking are struggling with.

It is hard to see what steps these sectors need to take to improve things, as their areas of weakness are both hard to define in a real-world situation and hard to disprove, even when defined, to sceptical members of the public. A policy of radical transparency, already popular and commonly advocated for as a business strategy, will help to address some of these issues but only if the public believe such transparency is genuine. Dealing with the issue of keeping promises may be impossible in the short term, as that sentiment is likely deep-rooted and related to historical behaviour. Time may be the only salve for that damage to the sector's reputation. On the other hand, understanding what the public wants from, say, the Oil & Gas sector, when it comes to sharing common values in responsible behaviour and intent almost certainly boils down to maintaining a balance between a sector's traditional business model and the public's changing expectations about that sector. In such a situation, a sector, or a company within it, may choose to accept relatively poor trustworthiness ratings in the short to medium-term because their ability to fundamentally change their behaviour is limited to the long term only.

A key recommendation, however, is for the sectors to focus on converting the people who are neutral towards them, rather than those who are negative or who rate the sectors as untrustworthy. Compared to other metrics we commonly use, such as favourability, the threshold to rate a sector trustworthy or untrustworthy is high and many people instead choose to sit on the fence either consciously or through ignorance of the sector or its issues. Over two-fifths of the public fall into the neutral category across each metric – a vast pool of potential for any sector willing to change their behaviour and also capable of convincing the public that they are acting in good faith and for the long term.

Trust: the Truth?

IN THE UK, NURSES ARE THE MOST
TRUSTED PROFESSION – 96% OF US TRUST
THEM TO TELL THE TRUTH – FOLLOWED
CLOSELY BY DOCTORS AT 92%^{IX}



How trust builds across business



HOW TRUST BUILDS ACROSS BUSINESS

GUILLERMO FERNANDEZ

Associate Director

In a world where global supply chains and markets are the norm, trustworthiness is increasingly the currency facilitating business – for example, we're more likely to buy our products and services from sources we feel we can rely on. In this context, global corporations need to ensure they maximise the level of trustworthiness generated through their many touchpoints with customers (such as their brands, communications, websites or the services they provide) and that they maintain the required reliability over time.

For big companies, touchpoints need to work in harmony, building a consistent narrative in order to maximise their appeal and credibility – it's no good running adverts about how concerned you are about the environment and then packaging your products in excessive amounts of single-use plastic. Attributes or equities attached to one entity (such as an organisation or brand) can be transferred (or 'flow') to another entity through stakeholders' understanding of the relationship between the two. For instance, if I like my iPhone and think that Apple works to keep my data safe, and designs

EQUITY CAN BE SAID TO FLOW WHEN
ASSOCIATIONS OR FEELINGS ABOUT
ONE ENTITY IMPACT THE ASSOCIATIONS
OR FEELINGS ABOUT ANOTHER WITH
WHICH IT HAS A RELATIONSHIP

products that fit my needs, I might then be more likely to use Apple cloud storage or Apple Music. Equity can be said to flow when associations or feelings about one entity impact the associations or feelings about another with which it has a relationship.

If you are a large food manufacturer with numerous consumer-facing brands looking to build trust through a commitment to sustainability and engagement in the local communities where you operate, there are two main avenues to achieve this: your corporate brand and your product brands.

Focusing on your corporate brand may have the effect of the positive (or negative) associations trickling down to your client-facing product brand, increasing favourability, willingness to recommend and purchase. However, this effect is limited if consumers do not connect the parent company with their brands – it is little use knowing that Unilever is committed to reducing its environmental impact if I don't know that Magnum is a Unilever brand when I'm standing in the freezer aisle of the supermarket trying to decide what ice cream to buy.

The other option is to begin at the other end of the spectrum, and ensure your product brands reliably deliver on your strategic vision of sustainability and responsibility. Due to equity flow, your overall corporate brand can be positively affected. This could translate into increased support from stakeholders who are knowledgeable

IF YOU PRODUCE GOODS SUSTAINABLY
AND THERE IS A CLEAR CONNECTION
WITH THE ENTITY BEHIND THEM,
YOU'RE MORE LIKELY TO BE SEEN
AS A SUSTAINABLE COMPANY

about your product portfolio and are looking to, for example, recommend your company as an investment. In practice, if you produce goods sustainably, and there is a clear connection with the entity behind them, you're more likely to be seen as a sustainable company.

The challenge is that equity flow means that it is not enough to talk the talk. If either end of the line is at odds with the image you are trying to portray you may be seen as inauthentic and suffer as a result.

For any organisation with a brand portfolio, equity flow is part of the commercial case for investing in building reputation. Companies that actively and consistently build trust amongst consumers across their entire spectrum of brands gain greater marketing efficiency. They face fewer headwinds in marketing and selling their products and services, have more effective advertising due to higher believability, and can charge a premium for their products.

TRUST IN REVIEWS AND RECOMMENDATIONS

KATHERINE SHIPTON
Research Manager

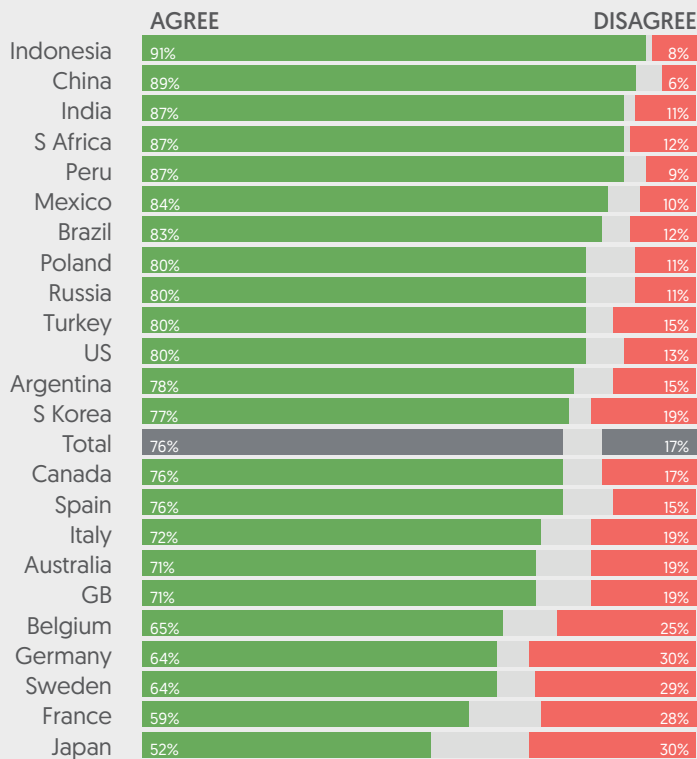
As trust in central authority has declined, we still trust 'other people', especially online. The majority of us are still happy to trust the reviews and recommendations of other consumers.

Three quarters of us [76%] say we will try a product or service that gets a lot of good reviews.⁶² But we are not blindly trusting, of course. Perfection makes us a little sceptical – studies show that 4.4 out of 5 is the consumer review score most likely to result in purchase, and reviews higher than this see a slight decline in the likelihood to purchase.⁶³



THREE QUARTERS WILL TRY A PRODUCT OR SERVICE THAT GETS
A GOOD REVIEW

If a product or service gets a lot of good reviews, I will try it



Source
Global Trends
Survey

Base
18,180 adults
across 23
countries,
online, 12 Sept
– 11 Oct 2016

Data distrust and the privacy paradox



DATA DISTRUST AND THE PRIVACY PARADOX

MARK MCGEOGHEGAN

Senior Research Executive

A large part of our economic model is now completely dependent on the willingness of users to hand over their personal data.

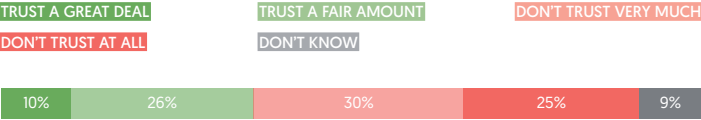
So, it is understandable that commentators and practitioners look at the low public trust in any organisation to collect and use data responsibly, and declare it a 'crisis' particularly with declining trust in information online. But, as ever, the reality is more complicated.

Data (dis)trust

It's not controversial to say that trust in how business handles data is low. An Ipsos/World Economic Foundation global study found that fewer than two in five people trust any public organisations or private companies to use the personal data they hold 'in the right way'.⁶⁴ Only healthcare providers are trusted by a majority to use their personal data correctly.

**THE MAJORITY OF US DON'T TRUST ORGANISATIONS
TO USE OUR PERSONAL DATA 'IN THE RIGHT WAY'**

% Trust to use personal data 'in the right way'



*Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, United States.

Source
Ipsos/World
Economic
Forum

Base
18,813 adults
aged 16-64
across 26
countries*

However, there is no evidence to suggest this is anything new. In 1991, two-thirds of EU citizens on average were concerned about data privacy; by 2008 that figure for the EU27 had barely changed [although there were country by country moves].⁶⁵ Between 2010 and 2015 the average proportion of EU citizens concerned about misuse of their data dropped only one point.⁶⁶

Europe is one of the most privacy sceptical regions in the world, so it should come as no surprise that people tend to be uncomfortable about handing control of personal data over to others, and that this has been the case since before the world wide web existed.

Yet this sceptical and distrusting environment is the one in which the new digital economy has emerged and thrives.

The privacy paradox

A 2010 study found that perceived privacy – a user's subjective expectation of how much personal data they are disclosing – and trust in an organisation to not misuse data, or collect it unnecessarily, could predict whether a user would disclose personal data.⁶⁷ In cases of low trust, high perceived privacy led to disclosure; in cases of low perceived privacy, high trust in an organisation did likewise. A customer may not trust big businesses such as Tesco, Arcadia or Amazon, but will still disclose a range of personal details to make a purchase and have it delivered to them, because they see this disclosure as necessary and not excessive.

CONCERN ABOUT DATA PRIVACY IS NOT CHANGING

EU citizens who are concerned about the collection of personal data



EU citizens who are concerned about the misuse of personal data



Source
Eurobarometer

Base
1991, 2008:
EU 12/15,
c 12,000,
2010, 2015:
EU 27/28
26,574,
27,980

However, per the study, where users don't see an immediate need to disclose data, or discover they are disclosing more than they thought, they will refuse disclosure unless they trust the business they are making the disclosure to. From this view, the narrative that data distrust is a crisis makes sense – concern about privacy, in the absence of trust, should cripple the new digital economy.

Yet concern and distrust have not stopped us from 'confessing' to Google, revealing our inner selves on Facebook, and allowing sites to track us across the web using cookies. These 'revealed preferences' pose a significant problem for the 'crisis' narrative, because they show that we are, generally, OK with disclosing personal data regardless of our 'expressed' concern and distrust.

A 2018 evidence review by Ipsos MORI suggested several factors that might explain this.⁶⁸ We may be more apathetic than we like to admit – saying that we worry about data collection and misuse, but not caring 'in the moment'. We may also overestimate our knowledge of both the extent and methods of data collection, and our understanding of how to protect our privacy. We should also

USERS DON'T SEE THEIR PERSONAL
DATA THE WAY BUSINESSES DO,
AND ARE GENERALLY UNAWARE
OF HOW VALUABLE IT IS

consider how easy it is to disclose personal data. Data collection is passive, it doesn't require us to do anything, making disclosure the path of least resistance in most cases. Disclosure is made all the easier by a devaluing of data – users don't see their personal data the way businesses do, and are generally unaware of how valuable it is.

A new model for your data?

The dominant 'crisis' narrative has led many to propose new models of data collection which compensate users for collecting and using their data and give them more personal control. They advocate new incentives to overcome the barriers of concern and distrust.

But concern and distrust are not the barriers to consumers' use of online services we might think. The role of data trust in the new digital economy is smaller than often assumed, and is part of a more complex psychology in which disclosure of personal data isn't just driven by trust, but by apathy, perception, and frictionless user experiences making 'disclosure' the easy thing to do.

Interrupting that seamless process of disclosure and putting a price on data will undermine the flow of data in two ways. It will stop disclosure from being the path of least resistance, prompting users to take more active decisions in which their expressed preferences

DISCLOSURE OF PERSONAL DATA ISN'T JUST DRIVEN BY TRUST, BUT BY APATHY, PERCEPTION, AND FRICTIONLESS USER EXPERIENCES MAKING 'DISCLOSURE' THE EASY THING TO DO

will play a greater role. It will also create clearer indicators as to how much data is being disclosed and when, filling gaps in users' knowledge about data collection and use.

The risk is that users' concerns are confirmed, increasing distrust, while also removing some of the additional factors which make disclosure easy. Why would we expect an informed, distrusting user to disclose data just because they are being paid, and what would the equilibrium cost of any given data be? Many online businesses are completely dependent on users' data, and their services are not a necessity – the price point at which users would disclose data could render their business models unsustainable.

This would not only impact businesses, but users too. A backlash against data disclosure could lead to services shifting from being free to subscription-based, without targeted advertising, making online interaction costlier for users, and online consumer choice more complex.

Data trust is not the be-all and end-all. In reality a range of other factors matter, and failing to appreciate the complexity of the situation precipitates the very crisis we're seeking to avoid.

Automation, AI and the changing nature of trust



AUTOMATION, AI AND THE CHANGING NATURE OF TRUST

SARAH CASTELL

Head of Futures

REBECCA WRITER-DAVIES

Research Manager

We are in the middle of the fourth industrial revolution. Computing has reached the point at which AI can learn directly from examples, data, and experience – enabling it to perform specific tasks intelligently and more rapidly and accurately than any human. Combine this with blockchain technology and the internet of things, and some writers have said that ‘trust’ will be revolutionised as it will become so much easier to authenticate data about provenance, technical details and more.

The public know that change is coming – but they do not know how to respond to it or how it might affect them. Around the world, people agree both that technology improves lives (76%) but many also fear that technical progress is destroying our lives [50%].⁶⁹ Equally, the British public are uncertain about the societal benefits of automation (32% agree they are positive) and are unconvinced about its impact on quality of life (30% agree and 26% disagree).⁷⁰ It is not just the public who are unsure – governments also express concern. UK parliamentarians surveyed by Ipsos MORI agree that automation will have a positive impact on the economy (66% agree) but also worry about its impact on

GLOBALLY, ONLY ONE IN THREE
PEOPLE SAY THEY HAVE A CLEAR IDEA
OF WHAT DATA COMPANIES
HOLD ABOUT THEM AND
WHAT THEY DO WITH IT

jobs – almost half [45%] think more jobs will be lost than gained as a result of automation in the next 15 years.

So, for business and government, it is becoming more important to consider the ethics of using these technologies, and the kinds of worlds that consumers and citizens want to see as a result of innovation. In the UK, public engagement on this is developing; bodies such as the Academy of Medical Science, the Royal Society and the Ada Lovelace Institute are engaging the public on the role of data science, machine learning and AI in the future. Responses to these public dialogues show both an interest, as well as an uneasiness about the role of AI and other automated technologies in society.

The first challenge is explaining purpose. Globally, only one in three people say they have a clear idea of what data companies hold about them and what they do with it.⁷¹ The general public want to know how an organisation intends to use any data it collects from consumers or the public, and crucially whether this will lead to broader social benefits (like increased choice) without causing harm (like leaving vulnerable or poorer people without choice). We see high trust in public institutions, like the NHS, compared with big business – the UK public are significantly more likely to trust NHS hospitals/clinics [76%] than business generally [47%].⁷² But even then, they are uncertain whether they should trust public sector healthcare providers with their data – just half [51%] of the British public say they trust the NHS with their data, while a third [35%] say they distrust it.⁷³ Our UK public dialogue work suggests that when

EQUALLY, THE BRITISH PUBLIC ARE
UNCERTAIN ABOUT THE SOCIETAL BENEFITS
OF AUTOMATION [32% AGREE THEY ARE
POSITIVE] AND UNCONVINCED ABOUT ITS
IMPACT ON QUALITY OF LIFE

a positive broad social purpose becomes clear, organisations are more trusted with our data.

The second challenge is how to understand the longer term effects of introducing automated systems on society. For consumers, data-driven services are already shaping ever more personalised experiences – but people in our UK dialogues express concern that if the switch to a more automated experience is made, consumer experience will change; being unable to talk to a ‘real human’ rather than a chatbot, for example. This ‘self-service checkout world’ tends to be described with constant mild annoyance and the potential benefits tend to go under the radar.

Aware of the need to keep the public on side – especially where huge public data sets are required to develop complex machine learning algorithms – industries which rely heavily on data-driven technologies are starting to come forward with guidelines for how society should proceed. In 2018, Microsoft published its six ethical principles to guide the development and use of artificial intelligence. In the same year, the UK Government set up the Centre for Data Ethics and Innovation to advise Ministers on how to unlock the potential of AI while ensuring it is developed safely. The ethics of using digital technology in healthcare have already been much discussed, given bioscience’s long tradition of ethical debate – in February 2019, the UK NHS published its Code of Conduct for data-driven health and care technology to inform the use of AI within the institution.

IT IS BECOMING MORE IMPORTANT TO
CONSIDER THE ETHICS OF USING THESE
TECHNOLOGIES, AND THE KINDS OF
WORLDS THAT CONSUMERS AND CITIZENS
WANT TO SEE AS A RESULT OF INNOVATION

We think all industries need to consider how their implied social contract will change as a result of AI and automation. The public have expressed concern about the impact of AI on jobs – half [54%] believe more jobs will be lost than gained as a result of automation within the next 15 years.⁷⁴ Companies need to consider what they are bringing to people as both citizens and consumers. Though individuals may want faster, cheaper, automated services at the point of purchase, how do businesses offer a narrative as employers which benefits society? Amazon's success has shown that worry about high street shops closing is not enough for consumers to avoid using faster, cheaper services – but at what point does its impact start to have a backlash and where are the public's 'red lines'?

Amara's Law⁷⁵ suggests that we tend to overestimate the effect of technology in the short-term, but underestimate its effect in the long-term. This makes it difficult for the public to imagine what the future will look like. Along with the pace of technological development, it is very difficult to future-proof legislation and governance in these areas. Knowing what the public see as 'trustworthy' and what they see as 'creepy' – both now and in the future – will be important. We will be following it closely.

Trust: the Truth?

IN MEXICO, JUST ONE IN
TEN PEOPLE THINK THE
POLICE ARE TRUSTWORTHY.
THIS RISES TO EIGHT
IN TEN IN CHINA^x



Trust and advertising



TRUST AND ADVERTISING

SALLY LAIRD

Research Director

VANESSA WEST

Research Director

No one really trusts ads, do they? All the smiling, happy people and amazing claims. But while we may take the promises of whiter whites and reduced fine lines with a pinch of salt, advertising still works!

In the world of advertising, not all ads are created equal – in particular when it comes to trust. While the secretive, targeted adverts used on Facebook during the EU referendum campaign may have shaken trust in advertising (and democracy), wide-reaching traditional media, such as TV and print ads, still actually play a key role in developing, sustaining, and (re)building consumer trust.

First, they are in the public domain and highly visible. Everyone – from the public to the regulators – can see the advertising and hold brands to account if there is dissonance between claims and reality (unlike the above mentioned targeted Facebook ads used during the EU referendum, invisible to huge swathes of the population).⁷⁶ Secondly, advertising is regulated in many markets and brands cannot make unsubstantiated claims without challenge.

WHETHER AN ORGANISATION IS
SEEN AS OPEN AND TRANSPARENT IS
VITAL TO TRUSTWORTHINESS.
ADVERTISING CAN BE KEY TO THIS

As discussed in the article on the drivers of trust, whether an organisation is seen as open and transparent is vital to trustworthiness. Advertising can be key to this.

Brands can use advertising to leverage trust. McDonald's, one of the original 'villains' of the fast food industry, was the subject of intense negative speculation about its ingredients and production methods. By the mid-2000s trust in the brand had hit an all-time low,⁷⁷ with the 'Super-Size Me' documentary a driving force in consumers questioning the quality of McDonald's produce [rumours included 'mutant laboratory meat', 'fries that fail to decompose – ever' and 'chicken nuggets formed from pink slime'].

While many would have sought to ignore the rumours for fear of fuelling them further, the brand tackled them head on. They launched a new campaign centred on the 'Good to know' theme, addressing some of the chicken myths (beaks in McNuggets) and dispelling them in a light-hearted way. At a time of increasing interest in the provenance of ingredients, the ads seemed to strike a chord with the British public. In the late 2000s, McDonald's sales steadily grew by over 50%!⁷⁸

Of course, tackling misconceptions is one thing, but when you have misled customers – such as Tesco and horsemeat, or Volkswagen and emissions – a very different strategy is required. In both these situations we can see similar steps underlying the response:

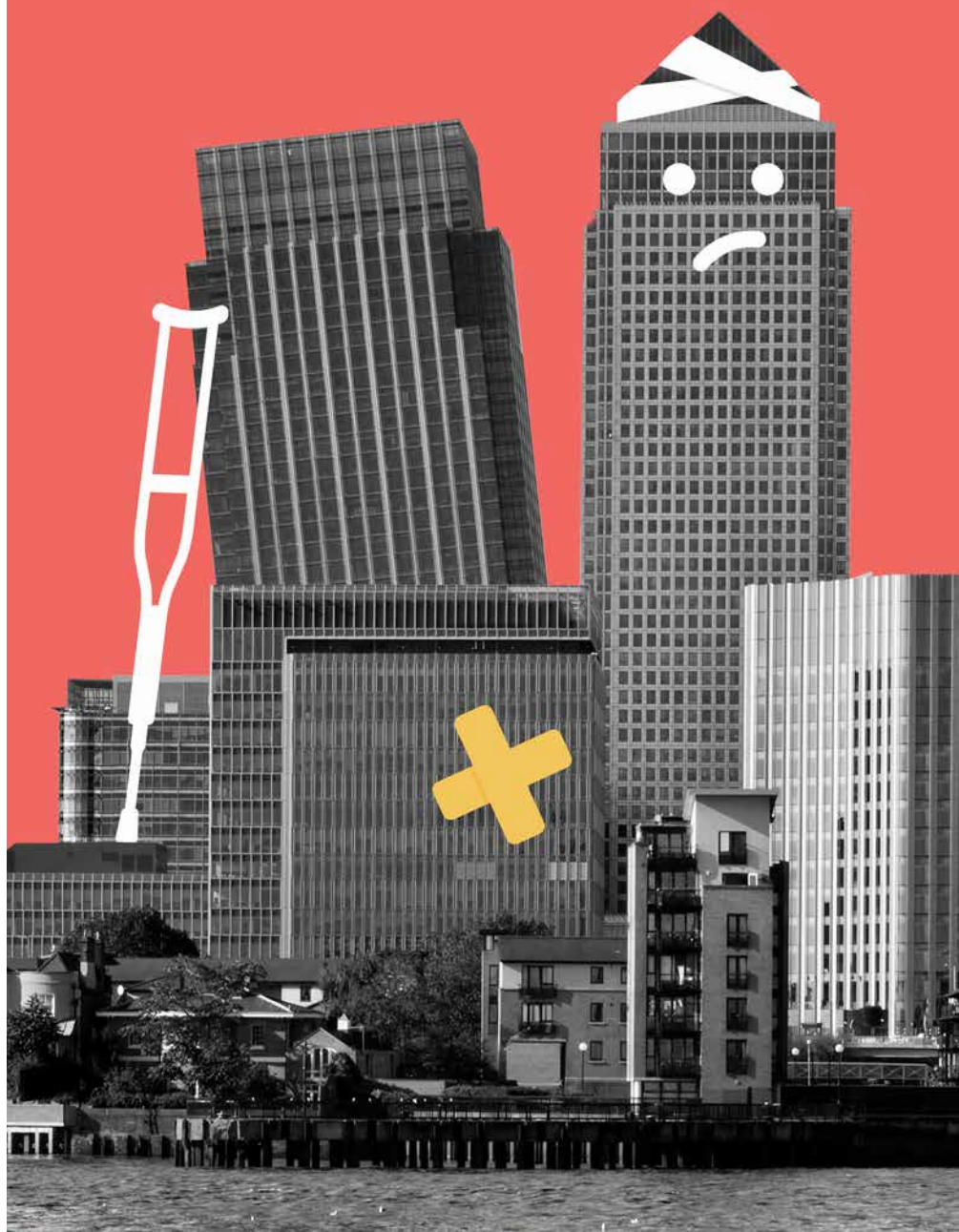
1. Admit to your mistakes in a bid to draw a line under them and move forwards. Both Tesco and Volkswagen did just that. Both ran press ads in national newspapers admitting their mistakes and apologising. Being open and honest, even if what you say isn't always positive, will help people to trust you in the long run.
2. Communicate the action you're taking as a result – Tesco refunded all affected customers and increased transparency in its supply chain in a bid to be more open about where produce comes from. Volkswagen offered affected customers money off a new Volkswagen and three years of free roadside assistance.
3. When the time is right, remind people why they fell in love with you in the first place and promote those values in communicating the brand's purpose for the future.

Volkswagen, by adhering to these principles, saw record sales in 2017, recording an overall rise of 3.8%,⁷⁹ becoming the world's biggest car manufacturer, despite its emissions scandal.

Once you've regained the public's trust, you may expect to see it pay dividends. Our research shows that consumers are more likely to see and believe advertising from companies that they trust. But more importantly, they are also more likely to act on this advertising by purchasing goods and services from the brand. Two thirds of people [64%] say they are willing to pay more for a product from a brand they trust a great deal.⁸⁰

Trust is a nebulous concept, but we think there are principles which brands can adhere to in order to build, or rebuild consumer trust: get your brand values right, be transparent about what you do, communicate this to consumers in the right way, and most importantly, do your utmost to follow through on who you say you are!

Trust in the financial sector



TRUST IN THE FINANCIAL SECTOR

PAUL STAMPER

Head of Financial Services Research

The global financial crisis in 2007 and 2008 kick started a conversation about trust in the financial services sector in the media, with policymakers, and among the general public. The already established perception, from the 1980s and 1990s, that ‘bankers’ were becoming ever greedier and more rapacious seemed to be reinforced. Added to this was the view that things had become so bad that the behaviour of these highly paid, massively self-interested elites was now having a direct impact on the everyday lives of ordinary people. When conducting focus groups on financial issues in the first few years following the crisis, one had to be prepared for the moment when the public would ‘kick off’ into an impassioned rant about the failings of the sector.

Things have moved on since then and our research shows that at least one aspect of trust in bankers has recovered. From our annual Veracity Index,⁸¹ the proportion of people who would trust bankers to tell the truth has actually risen steadily from a low of 21% in 2013, to 41% in 2018. However, it was clear, even at the heart of the sound and fury following the crash, that the trust picture in financial services was far from clear-cut.

As we see in this report, the complex issue of trust operates with particular dynamics in the financial services sector. At the most superficial level, one might ask oneself: “If trust in banks is so relatively low, why is it that we entrust them with all our money?” To some degree, of course, the answer is that we don’t have a great deal of choice. Right across the world, people are increasingly being paid electronically, and financial systems are set up so that a repository and independent guarantor of digital funds is necessary for one to access and use one’s money. Whether distributed ledger technology (the concept behind blockchain and Bitcoin) will eventually offer a credible alternative remains to be seen, but for now, for the vast majority of us, a bank is a necessity.

Revisiting Phillip Pettit’s three forms of trust (below), it would seem that basic trust is so foundational, at least in personal banking, that many would take it as read (a hygiene factor, as referred to in the discussion of the drivers of trust). However, we can’t simply ignore basic trust. A recent high-profile technology failure for TSB, when migrating from one IT system to another, led to many customers being unable to access their money for many days. This failure has not led to TSB losing all its customers, but the out-migration has been considerable. The run on Northern Rock during the financial crisis is another example of the catastrophic impact of failures in basic trust.

PETTIT’S THREE FORMS OF TRUST

Basic Trust – will the other party do what they say they will do?

Active Trust – will the other party treat you well, and have your wellbeing in mind when they make decisions and take action?

Interactive Trust – does your trust in the other party strengthen or reinforce their existing reasons to do what you rely on them to do?

TRUST DIMENSIONS FOR BANKING

TOTAL AGREE

TOTAL DISAGREE

BASIC TRUST

It is good at what it does



It is reliable/keeps its promises



ACTIVE TRUST

It is well led



It behaves responsibly



It is open and transparent about what it does



INTERACTIVE TRUST

It shares my values



It does what it does with the best of intentions



It would try to take advantage of me if it could



Source
Ipsos Global
Advisor

Base
19,782 online
adults aged
16-64 across
27 countries,
26 Nov - 7 Dec
2018

Moving to a consideration of active trust, we come to one of the key challenges for the banking and financial services sector. Even the most cursory understanding of how the system works can leave consumers with a sense of imbalance; the interest I receive on my savings is far less than the interest I pay on my borrowing. Against this foundational idea, it is hard to establish a view of the

Trust in the financial sector

sector as having my wellbeing at heart or treating me well, and because this is about 'my money' the subject tends to be emotive. Consumers may accept intellectually that banks need to make money somehow, to pay for the services they provide, but that it is at their customers' 'expense' is a harder reality for many to accept emotionally. When we look at the different elements of trust for banking, we see the highest levels of disagreement [39%] in response to the idea that banks are open and transparent about what they do. Add to this the impact of mis-selling scandals, such as PPI in the UK, and it is easy to see why many consumers find active trust hard to give, even to high street banks, the most directly relatable organisations in the financial services sector.

If active trust is so hard to achieve, interactive trust can easily be seen as a step too far for the financial services industry. The data on trust dimensions appears to bear this out. As a sector, banking is the one consumers are most likely to believe would try and take advantage of them, if it could [52% agree], and only a quarter of people would agree that it has the best intentions or shares their values.

However, the alternative engagement models which some of the neobanks [such as Monzo and N26] and FinTech providers are introducing offer approaches which could enable financial services brands to establish both active and interactive trust. Involving customers in decisions about new product features and launches; being open in discussing and responding to customer concerns; providing products or services which are beneficial to the customer and neutral for the bank [or even, on the surface, detrimental, such as reducing the charges they pay], are all strategies that offer potential for building consumer and customer trust in banks. If the new FinTech companies offer all these alongside reliability and security, the traditional banks will have an even bigger problem.

Trust: the Truth?

BANKING IS THE
SECTOR THAT
CONSUMERS ARE
MOST LIKELY TO
BELIEVE WOULD
TRY AND TAKE
ADVANTAGE OF
THEM, IF IT
COULD
[52% AGREE]^{XI}



What is the role of trust in consumer innovation?

WHAT IS THE ROLE OF TRUST IN CONSUMER INNOVATION?

ALEX BAVERSTOCK

Head of Product and Pack Testing, UK

Trust doesn't tell the whole story

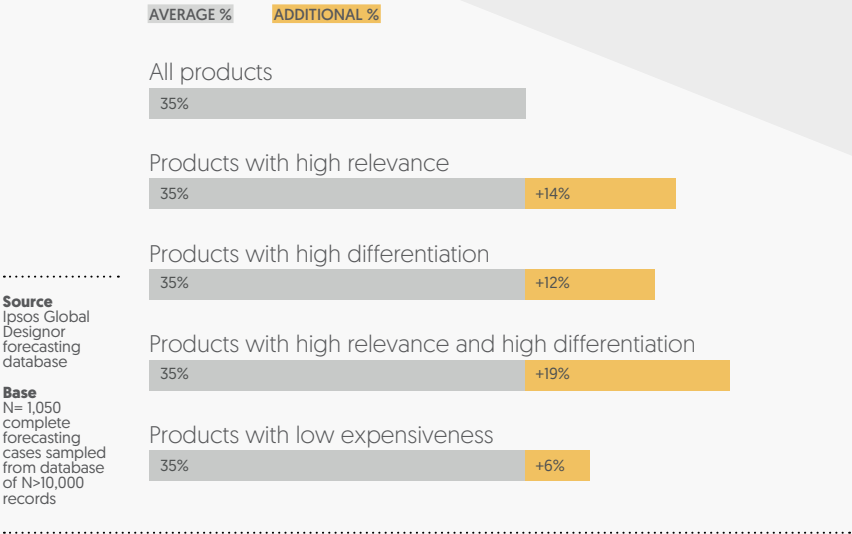
If you sell products or services, obviously it is better to be trusted than not – it's good for repeat business, with people choosing you ahead of other less trusted options.

Being trusted can also give you an edge when developing a new offer, and we know that concepts from familiar brands are more likely to be 'promising' propositions.⁸² However, innovations from familiar brands don't always show good potential.



**FOCUS ON DRIVERS OF INNOVATION SUCCESS:
RELEVANCE, EXPENSIVENESS, DIFFERENTIATION**

% of new products achieving a healthy level of trial in year 1



Focus on drivers of innovation success and trust should follow

When it comes to successful innovation, trust matters less than three key drivers: Relevance, Expensiveness and Differentiation. Perform strongly on these, relative to what exists on the market, and success is more likely.

The promise of something new and different drives much consumer innovation, so pre-existing trust isn't always important. But at the same time, how would new brands enter the market if people weren't willing to take a 'leap of faith' occasionally? This is another example of the nuances of trust and how it works differently in different scenarios.

Trust in e-commerce



Relaxed Armchair

£299

This ideal armchair is a delightful piece of furniture with a soft cushioned seat and is very versatile.



Dimensions

Fabric



TRUST IN E-COMMERCE

STUART WOOD

Director, Global Shopper and Retail

In traditional retailing, trust is built up through personal experience of a shop; a physical store is a tangible entity, you can browse, touch and sample things, you can physically see the store's popularity and other people buying (so this builds re-assurance). Most of the time you will actually walk out of the store with your purchase, you can speak with staff and have a direct channel for resolution should things not be to your liking or you need to return a product.

But e-commerce is flourishing. It provides ultimate convenience by giving us 24/7 unrestricted access to products and services, no matter where we are, AND we can have these things delivered to our homes or accessed immediately.

But with the transaction being more remote, trust becomes a bigger issue. Unlike bricks and mortar retail, even basic trust (as discussed earlier) involves a leap of faith, as we are often paying over money in the hope that the product actually exists and will arrive at our door in a matter of days, as agreed.

UNRELENTING E-COMMERCE GROWTH

% purchasing each category online in the past six months

	CHINA	S KOREA	US	GB	BRAZIL
Clothing & accessories	61%	48%	49%	47%	37%
Personal tech	35%	15%	20%	18%	23%
Personal care products	52%	38%	28%	24%	15%
Grocery (ambient)	41%	33%	14%	21%	4%
Take away food	34%	17%	19%	19%	9%

Source
Ipsos
Omnichannel
Trends Survey,
March 2018

This is especially true when someone is shopping for a particular item or brand for the first time. Their danger antennae are on full alert:

- How can I know the products will be as good as described/pictured?
- Will I receive them in good time [or at all]?
- Are the payment methods secure?
- How will the retailer treat my personal data?

Of course, trust is also a function of size and familiarity, so once a retailer becomes well-known and we deem them trustworthy, trust becomes less of an issue. Amazon is benefitting massively from this. But how do new players or lesser known websites communicate trust during that all important first encounter?

Websites can [and most do] build in signals of their trustworthiness into their website design and functionality. Trust signals are features or qualities of your site that inspire trust [and reassurance to buy] in the mind of the shopper.

These are seven of the most important:

1. Ratings and reviews

Ratings and reviews are critical as they provide evidence of satisfaction from prior customers: 93% of consumers say product reviews influence their purchase decisions and 85% trust online reviews as much as personal recommendation.⁸³ The quality of reviews and the number present are important, a high number of reviews indicates the site is well used, so another good sign.

However, negative reviews are also helpful for consumers, as a negative review provides the worst-case scenario for a product. They also aid in maintaining the credibility and authenticity of both the product and the site by providing balanced and candid information.⁸⁴

Amazon product reviews are the most popular and trusted. Shoppers will often go to Amazon for reviews even if they intend to purchase the product elsewhere.⁸⁵

2. Contact details

Despite the predominance of online purchasing, people still want the trust that comes from a physical location and tangible ways to make contact. A business should display its physical address (and ideally a map and directions), phone number and email. If it's a small business it's a great idea to show individuals and real pictures. These steps turn a faceless e-business into something more familiar, more tangible and more akin to a traditional store you might use.

3. Social media

Building social plug-ins into your site is another useful layer of trust. Social sites are where people spend their time and connect with their friends and peers. If you connect with potential customers this way they are more likely to trust you and your messaging.

4. Multiple payment options

An e-commerce business needs to provide multiple ways to pay, as shoppers prefer to pay in different ways depending on their preferences and desire for payment security. Even if a payment method is rarely used, offering a wide variety of payment options builds trust as it shows consideration. These kind of broader considerations echo Pettit's concept of interactive trust, elevating a brand beyond just functional levels of trust.

5. Third party badges and certifications

A third-party trust seal helps to communicate that a website is legitimate. These come in many forms: the secure padlock symbol beside the site URL, trust seals, SSL certificates (small data files that digitally bind a cryptographic key to an organisation's details when installed on a web server; these files activate the padlock and the http protocol and allows secure connections from a webserver to a browser) and third party branded endorsement. All of these elements reinforce trust, even if shoppers don't truly understand the technical implications – the badges evoke a perceived sense of security.

6. Be transparent with shipping costs

Unexpectedly high shipping costs are the biggest reason for cart abandonment. Be transparent with shoppers on shipping costs (and manage expectations regarding delivery) as early on as possible in the transaction process: do not hit customers with high delivery costs at check out.

7. Ease of return

Ease of return is a big factor for online shopping. If customers don't like a product, it's faulty or doesn't fit, they need to feel that returns are easy and free. Warby Parker (selling eyeglasses) was a pioneer in making e-commerce work for categories that have always relied on physical trial and professional advice in store. Their breakthrough was in shipping multiple pairs for a customer to try and only pay for the one[s] they keep.

AS HUMANS WE LOOK FOR FAMILIAR SHORTCUTS OR SIGNS OF TRUST TO KNOW WHO WE CAN PUT OUR FAITH IN

Building in heuristics to signify trust

Online, shoppers must make quick decisions, so trust is a key issue. As humans we look for familiar shortcuts or signs of trust to know who we can put our faith in. In order to gain that first sense of trust, businesses can easily build these signals into their website designs and functionality. However, trust is, of course, more than just skin deep. While these signposts of trust may help consumers to click that final 'purchase' button, ultimately businesses need to deliver on their promises to gain and maintain trust, or everything above is simply 'lipstick on a pig'.

Trust and the sharing economy



TRUST AND THE SHARING ECONOMY

TARA BEARD-KNOWLAND

Head of Social Intelligence Analytics

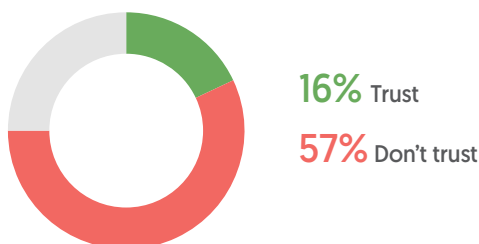
The sharing economy (including the likes of Airbnb and Uber as well as TaskRabbit and blablacar) takes reliance on trust to new levels. I'm a regular Airbnb user. When I book somewhere, I trust that it exists, looks like the pictures shown, is clean and tidy and safe. The owner trusts that I won't trash the place and will abide by their rules. We trust Airbnb to facilitate our transaction and Airbnb trusts that we keep our ends of the bargain, to not destroy the place, leave it filthy, or worse. That's a lot of trust in a single transaction!

As of July 2017, 62% of the UK adults claimed to have participated in the sharing economy in some way.⁸⁶

Once we start seeing the benefit of the sharing economy in one area, we're likely to start embracing it in others – 73% of those who use some sort of sharing economy platform once a month or more frequently also use other services.⁸⁷ Familiarity plays a role in uptake, but trust is a major barrier. In 2017, PWC identified trust as a key issue for the sharing economy to tackle⁸⁸ – and that hasn't improved with time. Using social intelligence, we have found that concerns about trust seem especially high in ride-sharing – not just Uber, but any

CONVERSATIONS ABOUT RIDE SHARING APPS ON SOCIAL MEDIA SHOW A LOT OF DISTRUST

Comments on social media regarding ride sharing



Source
Ipsos MORI
hand-coded
n=250 social
media posts
dated between
01-09-17 and
31-08-18.
Query syntax
is available on
request

type of ride-sharing service; some of these are generic "I don't trust them" and others more specific, especially physical safety concerns. In fact, an audit of social media perceptions showed that nearly six in ten of the randomly selected posts about trust and sharing economy brands in the UK were about people saying they did not trust the company or brand providing the sharing economy service.⁸⁹ Lack of trust in the individual providing the service was also especially noted.

A knotty issue is the one of responsibility: who has responsibility for poor service at Uber or Airbnb? Over the last ten years, studies have shown that sharing economy users are more likely to say the platforms themselves have responsibility, rather than the individuals providing the goods or service on them.⁹⁰

DEFINING THE SHARING ECONOMY

The sharing economy is typically defined as the sharing of assets or services between individuals, i.e. a peer-to-peer system. These are usually facilitated through some sort of platform, like Uber or Airbnb. However, there are also overlaps with other new economic models, including the collaborative economy (where people work together to sell something – the sharing economy is typically seen as a subset of this) and the gig economy (in which people sell services or things on a one-at-a-time gig basis).

DISTRUST POSTED ON SOCIAL MEDIA IS LARGELY ABOUT THE DIRECT SELLER – WHILE THE PLATFORM ITSELF IS OFTEN HELD RESPONSIBLE
 Comments on social media regarding sharing economy

Don't trust driver/host/seller



Lack of data protection



Lack of data safety



AI & self-driving (negative)



Pricing issues

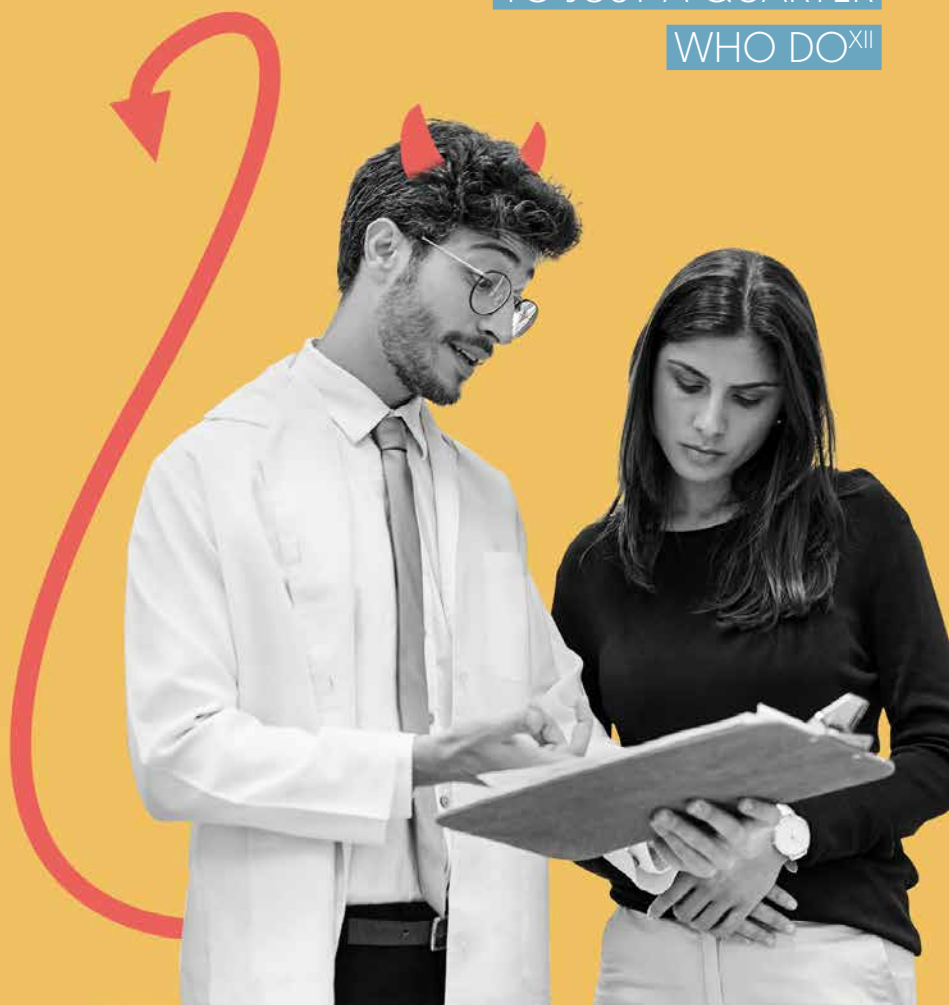


Source
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 Query syntax
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Lawsuits and complaints about assaults demonstrate that this is especially true with background checks.⁹¹ If we look into our social media analysis, consumers frequently name the platform providers as culprits, especially for not vetting the sellers enough, again particularly true with ride-sharing platforms. For example, in London in particular the safety issue is a real one as there is no real vetting of Uber drivers as there is for black cabs. This desire for corporate responsibility is not entirely surprising – we've seen in other studies that people are more likely to put the responsibility on the government or a corporation than on individuals, for example in dealing with waste.⁹²

Peer-to-peer interactions, on which the sharing economy relies, can be difficult to police, but platforms are going to need to build and maintain trust. The power of social media means every negative interaction has the potential to make a mark – chipping away at reputation and trust. The platforms themselves need to be more actively involved to address trust issues, as some have been doing already, or they can expect more government intervention.

FOUR IN TEN AMERICANS
DO NOT BELIEVE THAT
PHARMACEUTICAL
COMPANIES BEHAVE
RESPONSIBLY, COMPARED
TO JUST A QUARTER
WHO DO^{xii}



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