



2018 Edelman Trust Barometer

Healthcare: U.S.

2018 Edelman Trust Barometer

Methodology

Online Survey in 28 Markets

18 years of data

33,000+ respondents total

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

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

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

General Online Population

7 years in 25+ markets

Ages 18+

1,150 respondents per market

All slides show general online
population data unless otherwise noted

Informed Public

10 years in 20+ markets

Represents 15% of total global
population

500 respondents in U.S. and China;
200 in all other markets

Must meet 4 criteria:

Ages 25-64

College educated

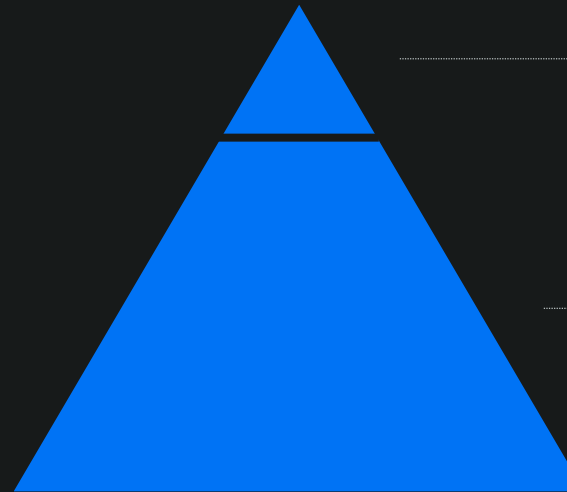
In top 25% of household income per
age group in each market

Report significant media consumption
and engagement in business news

Mass Population

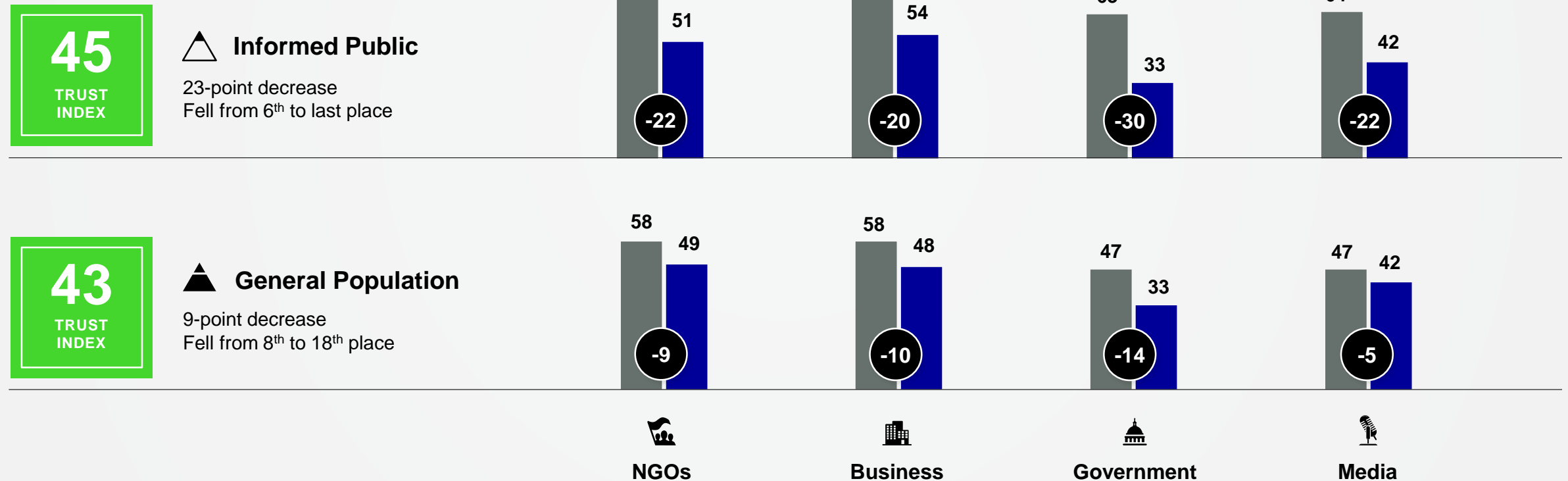
All population not including informed public

Represents 85% of total global population



Trust Crash in U.S.

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



Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and General Population, U.S. The Trust Index is an average of a market’s trust in the institutions of government, business, media and NGOs. Informed Public and General Population, U.S.



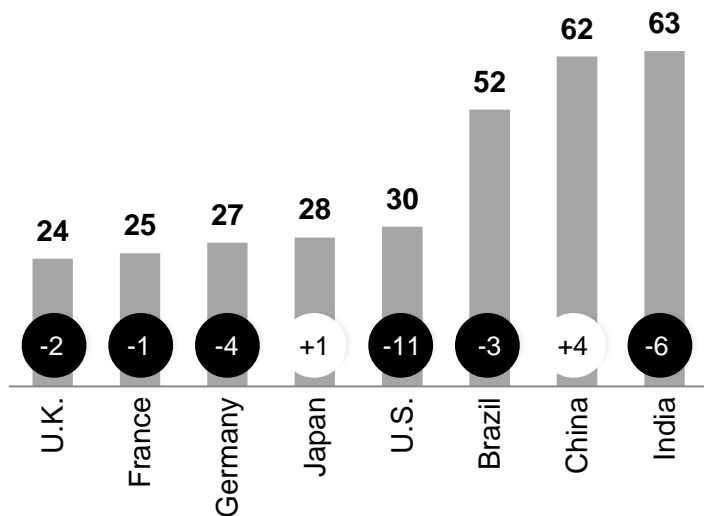
2018 Trust Barometer

Business Expect to Lead

Information platforms not trusted

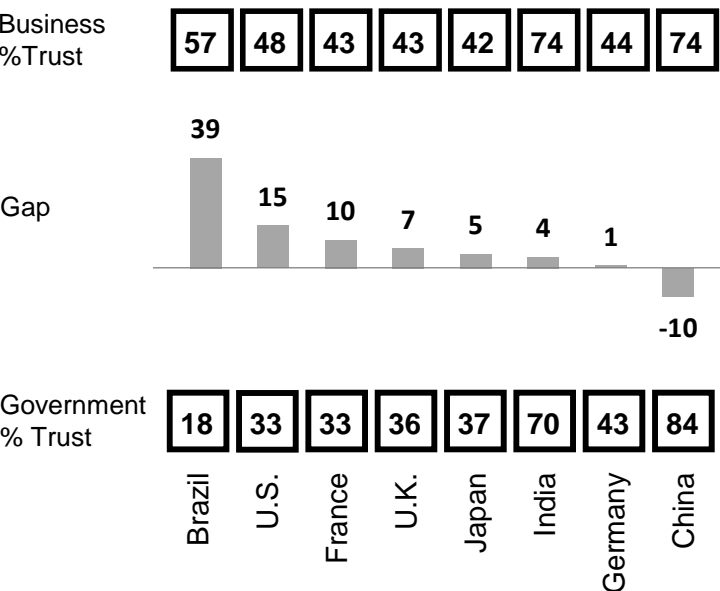
Percent trust in social media

— 0 — + Change, 2017 to 2018



Business more trusted than government

Gap in trust, business vs. government



Business expected to take initiative on change

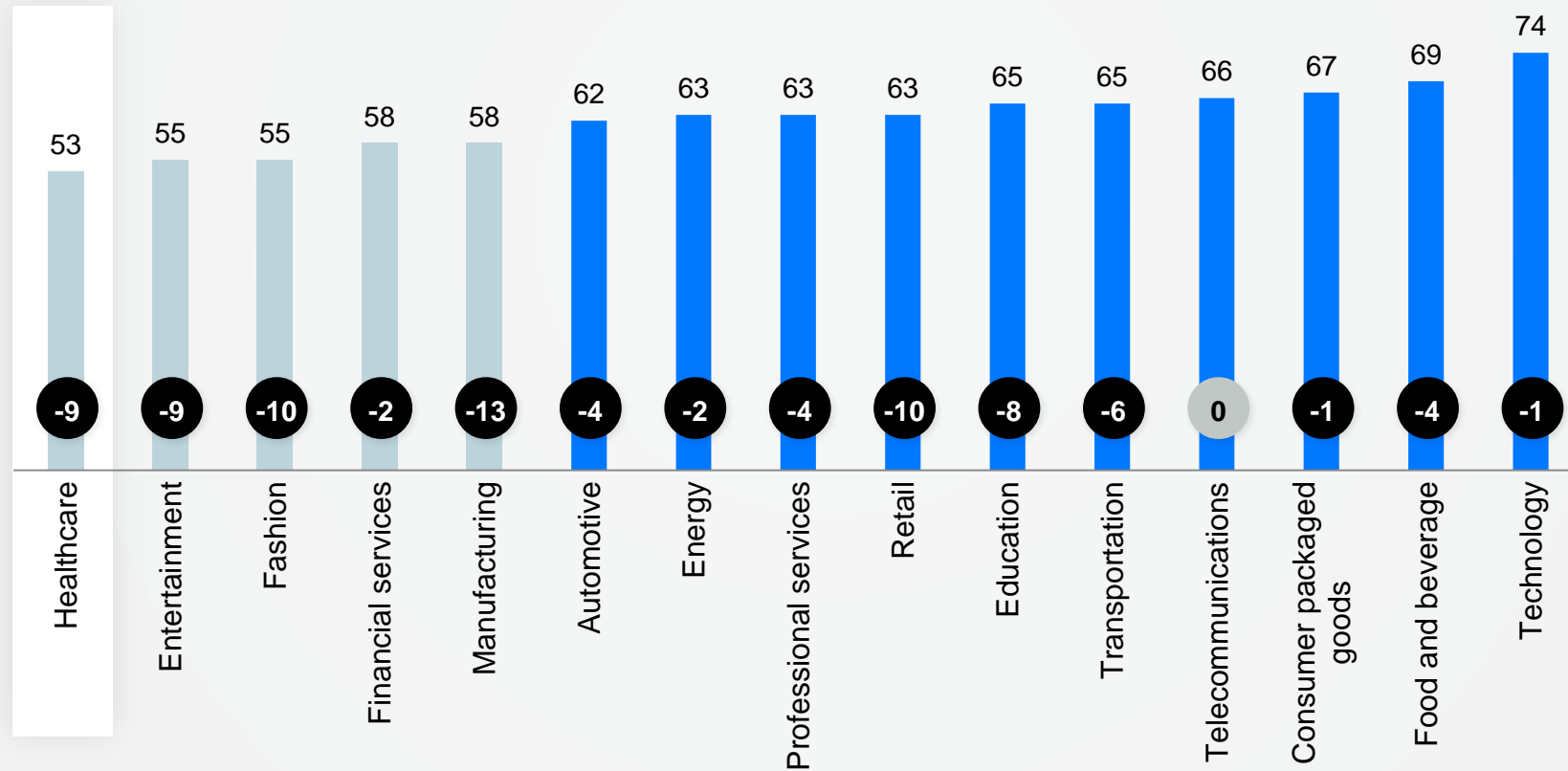
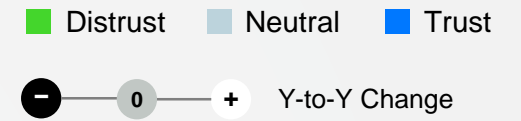
64%

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

Source: 2018 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” 9-point scale; top 4 box, trust, question asked of half of the sample. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? 9-point scale; top 4 box, agree, question asked of half of the sample. General population, 8-market average.

Healthcare Least Trusted of 15 Sectors

Percent who trust each sector, and change from 2017 to 2018, in the U.S.



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

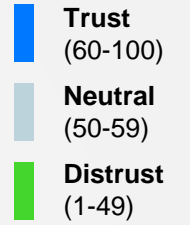
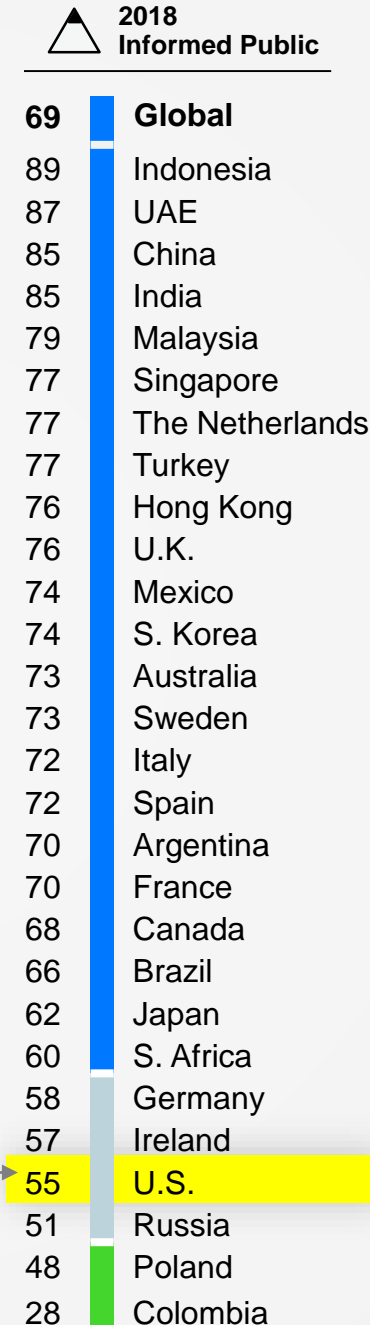
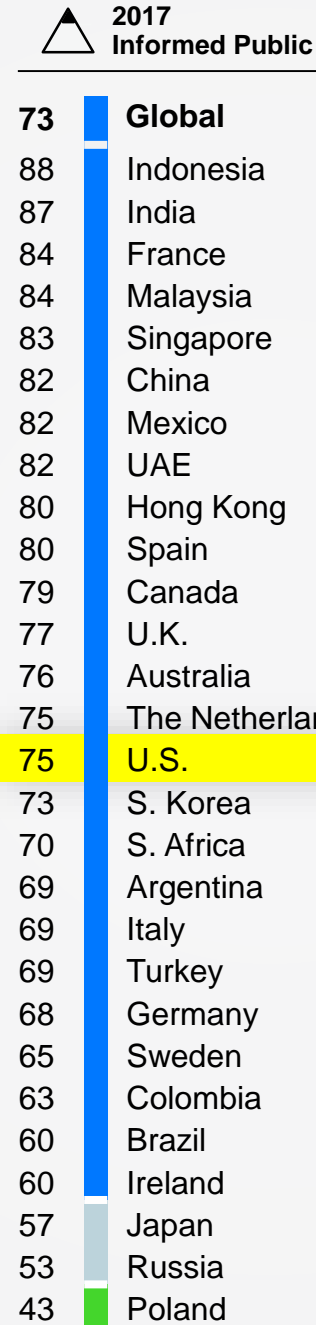


Trust in Healthcare Informed Public Declines in 16 of 28 Markets

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

A 4-point decline in Trust in health, Globally

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




Biggest changes

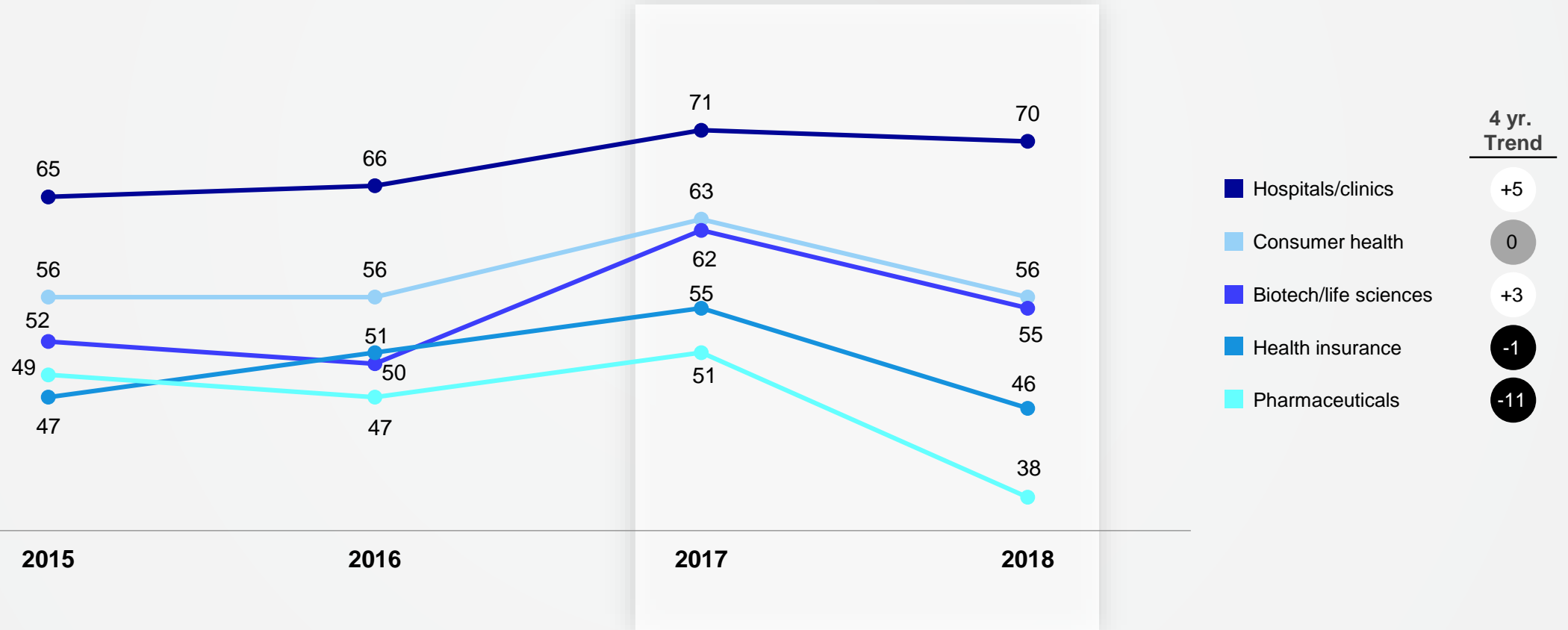


U.S. trust in healthcare
crashes 20 points

Largest Trust Decline in U.S. Health Sub-Sectors Since 2015

Percent trust in the health sub-sectors, and change from 2017 to 2018, in the U.S.


 Change, 2017 to 2018



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



Navigating a Polarized World

Every Healthcare Company Must:

- 1 Be its own publisher
 - 2 Use a chorus to tell the story
 - 3 Make patients tech partners
 - 4 Be prepared for the storm
 - 5 Act with purpose
-

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

Trust in Media

56%

Trust the media to report accurate information about healthcare

Credibility of Health Companies

65%

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

Source: 2018 Edelman Trust Barometer. DRV_HEA_CRE. How credible is the information that is provided by healthcare companies about medical conditions and their treatments? (Top 4 Box, Trust), question asked of one-fifth of the sample. DRV_HEA_REP. How much do you trust the media to report accurate information about healthcare, such as diseases, treatments and prevention? (Top 4 Box, Trust), question asked of one-fifth of the sample. General population, U.S.



Present Content in Multiple Formats

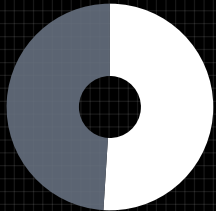
Which do you believe is giving you the truth?

51%

Personal experiences

49%

Data

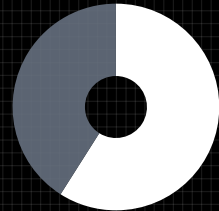


59%

Video

41%

Words

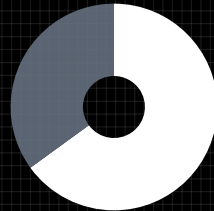


65%

Spontaneous speaker

35%

Rehearsed speaker

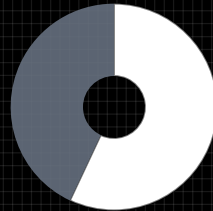


57%

Detailed argument

43%

Short and simple argument

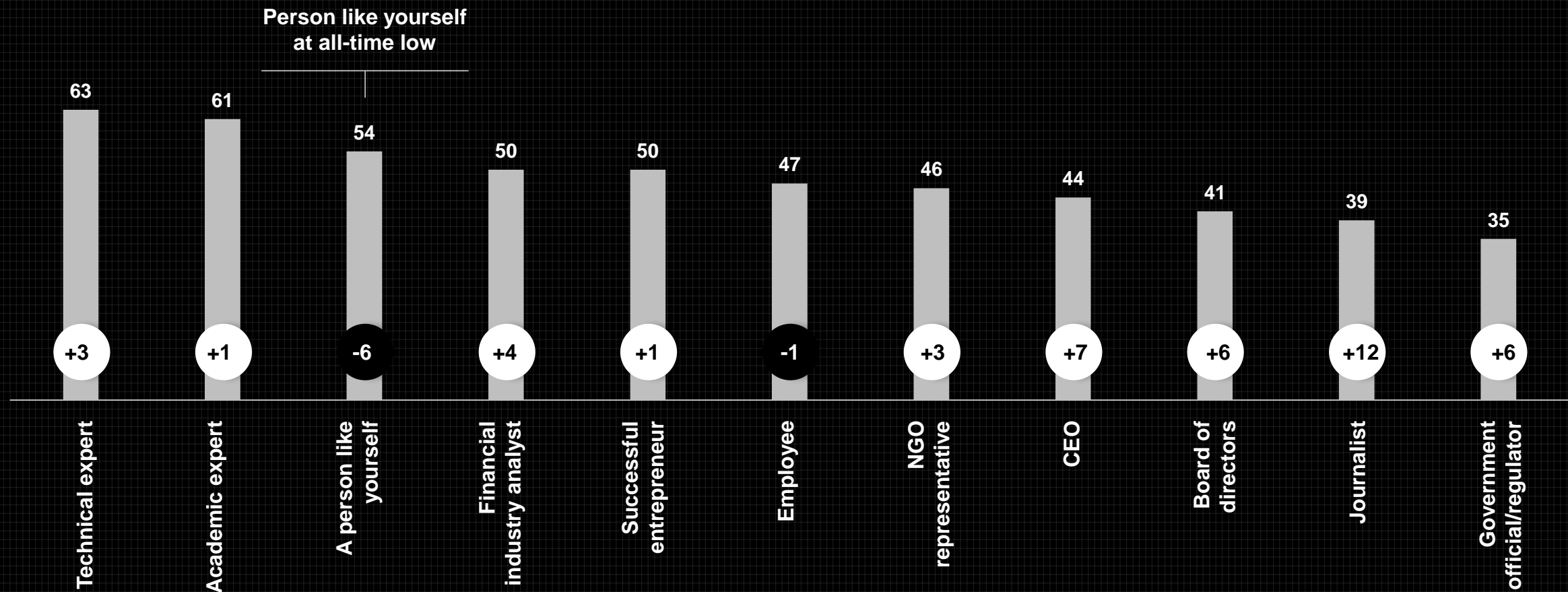


Source: 2018 Edelman Trust Barometer. COM_RFB. You are about to see a series of two choices. For each pair, we want you to choose the one that you are more likely to believe. Question asked to half of the sample. General Population, 28-market global total.

Voices of Authority Regain Credibility

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

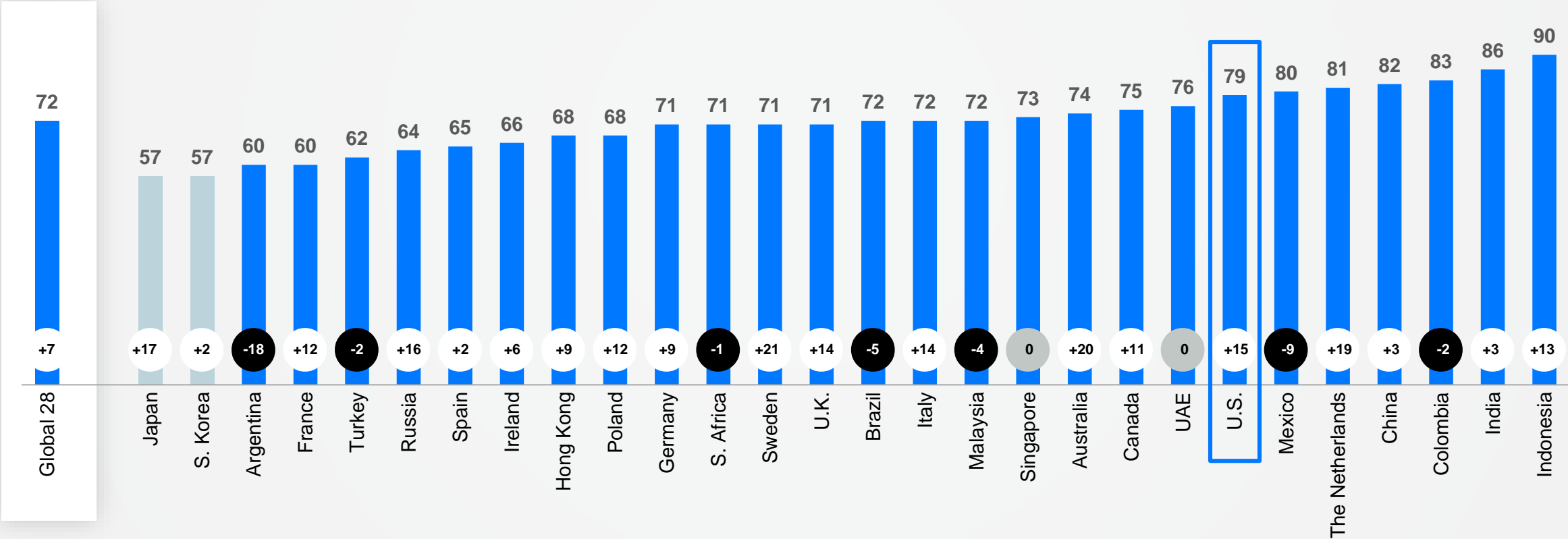
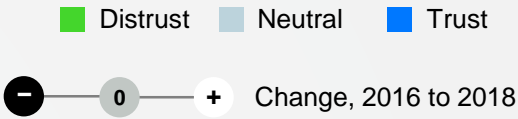
Y-to-Y Change



Source: 2018 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible), question asked of half of the sample. General population, 28-market global total.

Employers Trusted Around the World

Percent trust in employer, and change from 2016 to 2018

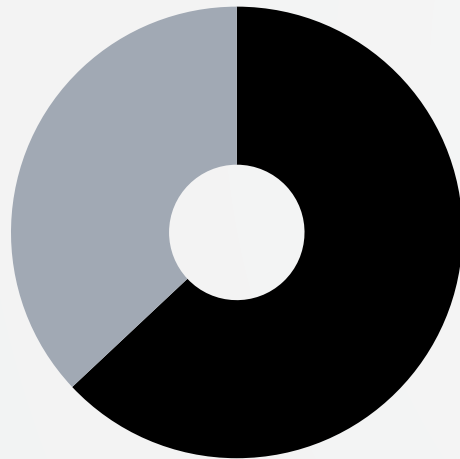


Source: 2018 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great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

Note: 2016 data was taken from Q525-526. Thinking about your own company and other companies in your industry, please indicate how much you trust each to do what is right using a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. (Top 4 Box, Trust), question asked of half of the sample. General population, 28-market global total.

Engage in Conversation Across the Business

Which is more believable about a company?



63%

Company's
social media

37%

Company's
advertising

Percent who agree:

52%

CEOs

should regularly
communicate directly to the
public using social media

64%

Employees

should participate in
their company's social
media activities

Source: 2018 Edelman Trust Barometer. COM_RFB. You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. For each pair, we want you to choose the one that you are more likely to believe is giving you the truth. While we know that some of these choices may not be easy, please do your best to select only one of the two options given--the one that is most likely to be true most often. Choices shown to half of the sample. . CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. CEO_EMP_EXP. Below is a list of potential expectations that you might have for a company employee. Thinking about employees in general, how would you characterize each using the following five-point scale. (At least some expectation, codes 3-5), question asked of half of the sample. General Population, 28-market global total.

3. MAKE PATIENTS TECH PARTNERS

Share Your Vision for Health Tech and its Benefits

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

Source: 2018 Edelman Trust Barometer. DRV_HEA_APP. How is the application of technology to healthcare most likely to impact healthcare in the next 5 years? Question asked of one-fifth of the sample. General population, U.S.



Create new, unforeseen issues that we are not prepared to address



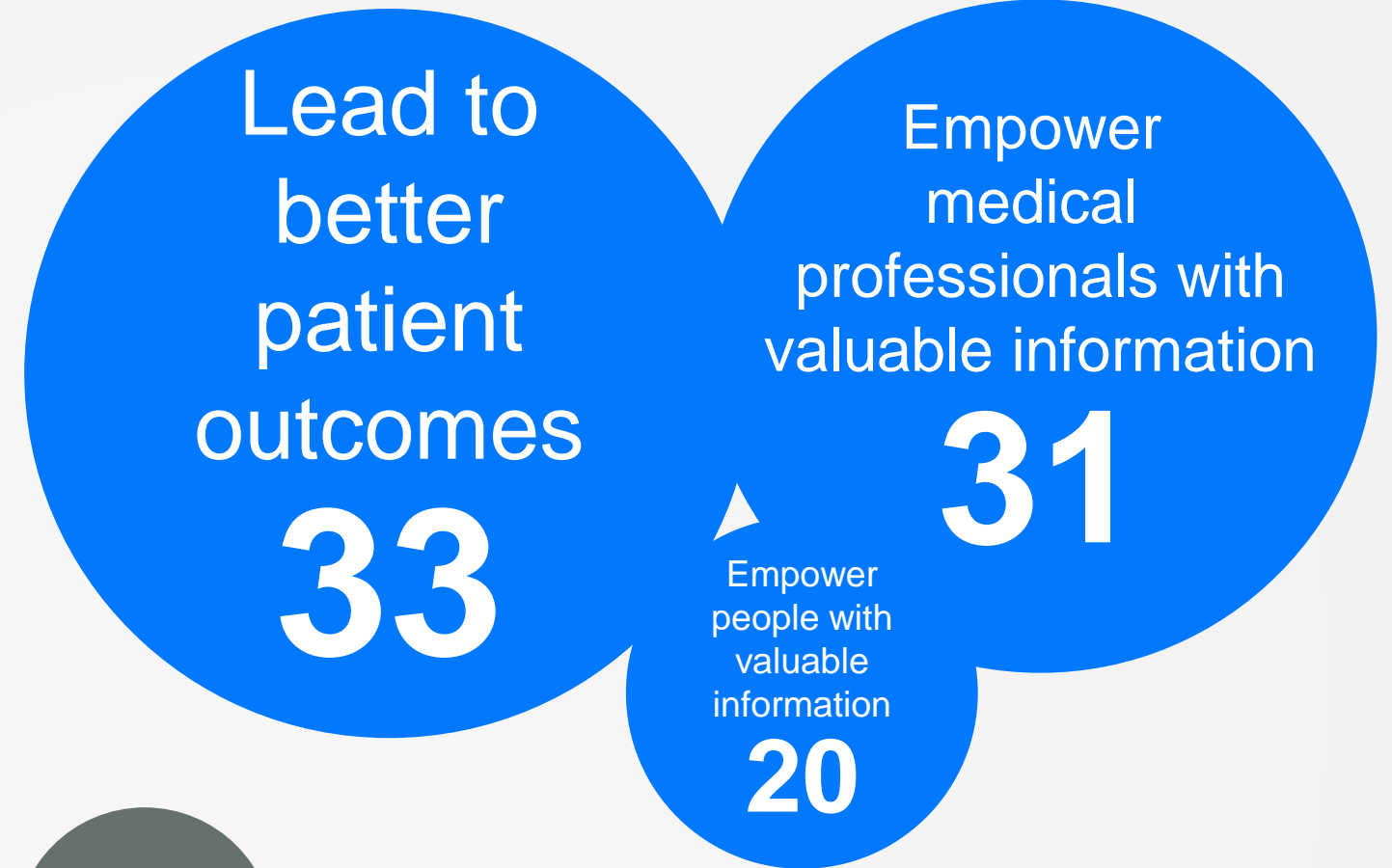
Provide me with information I may not want to have



Lead to worse outcomes to patients



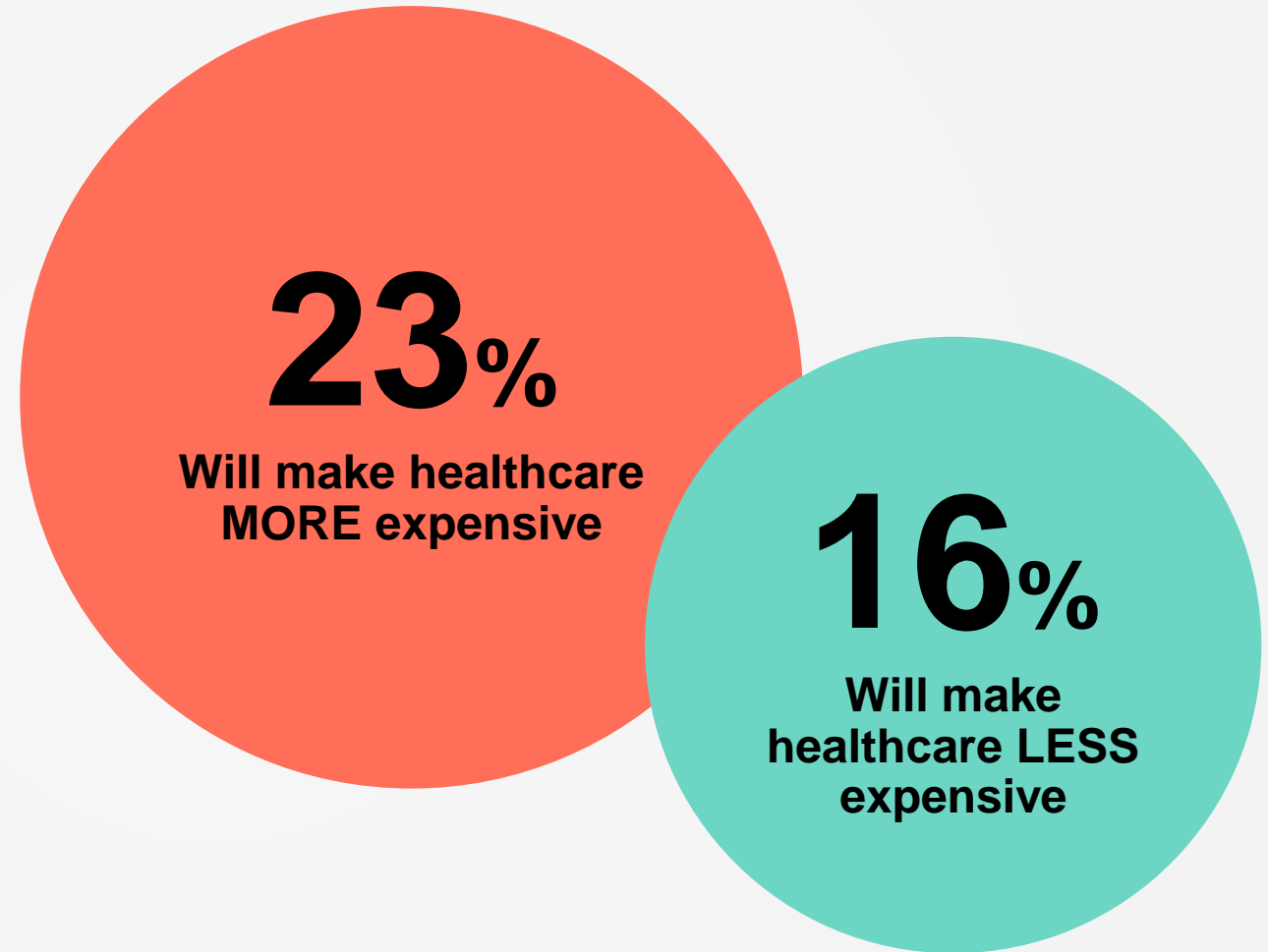
Give too much information to healthcare professionals / the healthcare system



Opinions Divided on the Impact of Tech to Cost of Healthcare

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

Source: 2018 Edelman Trust Barometer. DRV_HEA_APP. How is the application of technology to healthcare most likely to impact healthcare in the next 5 years? Question asked of one-fifth of the sample. General population, U.S.



4. BE PREPARED FOR THE STORM

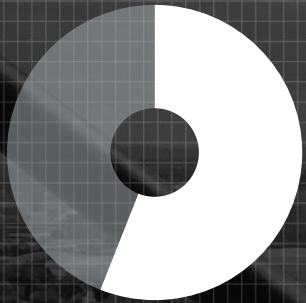
All Health Companies Must Address Cost, Pharma Takes Bulk of Blame



Source: 2018 Edelman Trust Barometer. DRV_HEA_HCH. Which of the following is most responsible for the high cost of healthcare? Question asked of one-fifth of the sample. General population, U.S.

Business Must Show Commitment to Long-Term

Percent who agree that ...



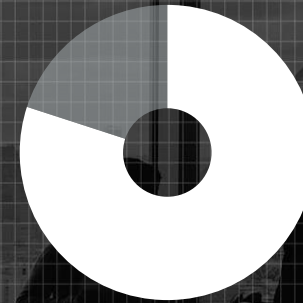
56%

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



60%

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



80%

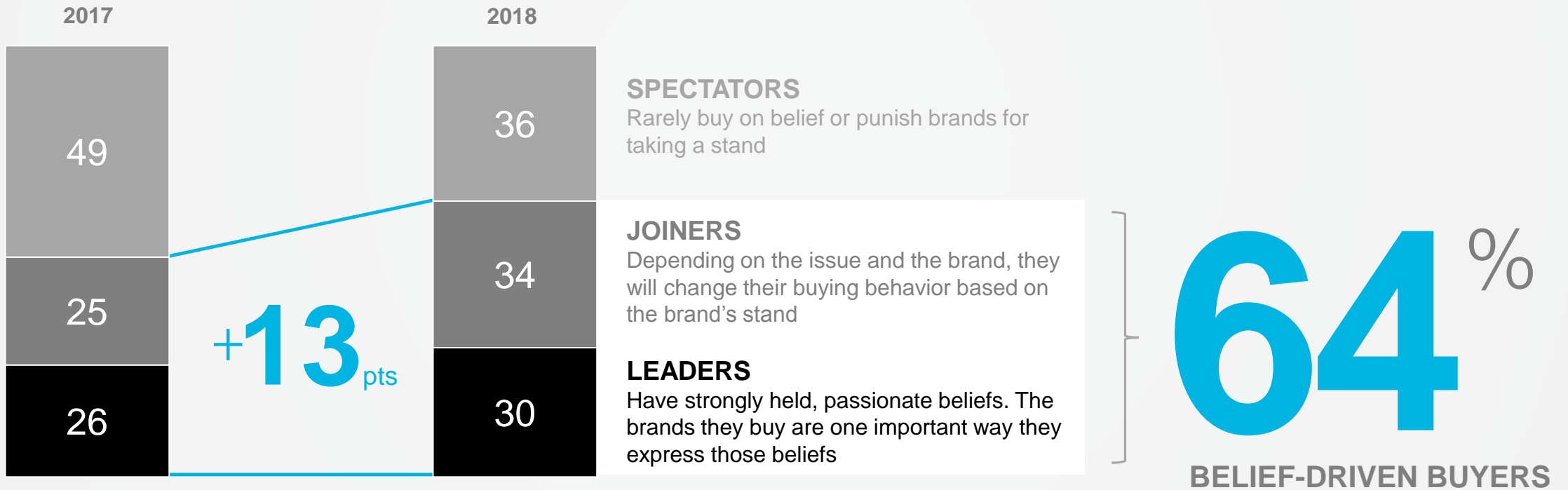
Agree pharmaceutical industry puts profit ahead of people

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

5. ACT WITH PURPOSE

Nearly 2 in 3 Now Belief-Driven Buyers

Do you choose, switch, avoid or boycott a brand based on its stand on societal issues? (Percent in each segment)



Source: 2018 Edelman Earned Brand. Belief-driven buying segments. 8-market average.
See Technical Appendix for a full explanation of how belief-driven buying was measured.

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 - 3 Address the whole person
 - 4 Be prepared for the storm
 - 5 Act with purpose
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Questions

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