



A study by
eon
The Stakeholder Relations Firm

The Philippine Trust Index

A Quantitative Study on the Level and Drivers of Trust
in Stakeholder Groups in the Philippines

15 September 2011

About the Philippine Trust Index

Measures the level of trust in stakeholder groups

Identifies key drivers of trust in organizations

Targets informed publics aged 25 to 64 years old

Covers NCR, Cebu and Davao

Face to face interviews: May-June 2011

Respondents' Profile

Media Consumption

Television

- 93% watches TV everyday
- 5% watches TV twice a week

Radio

- 35% listens to radio everyday
- 35% listens to radio twice a week

Internet

- 55% uses internet everyday
- 26% uses internet twice a week

Area	No.
NCR	300
Cebu	100
Davao	100

Gender	%
Male	49
Female	51

Education	%
Complete 3 rd yr college	27
College graduate	71
Post graduate	2

Age	%
25-29 yrs old	22
30-34 yrs old	19
35-39 yrs old	14
40-44 yrs old	14
45-49 yrs old	11
50-54 yrs old	7
55-59 yrs old	6
60-64 yrs old	7

SEC	%
AB	10
Upper C	30
Lower C	60



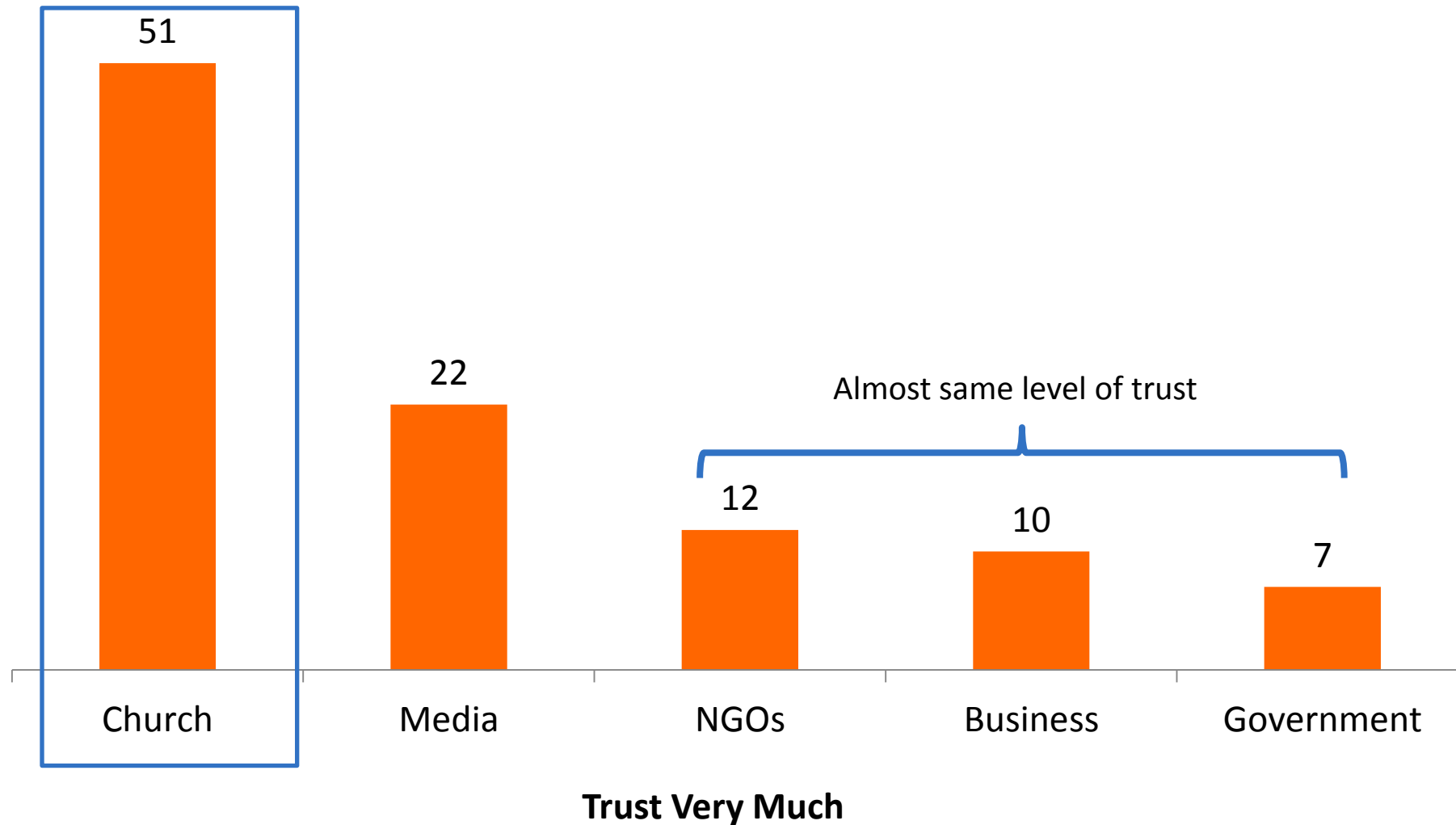
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How trusted are they?

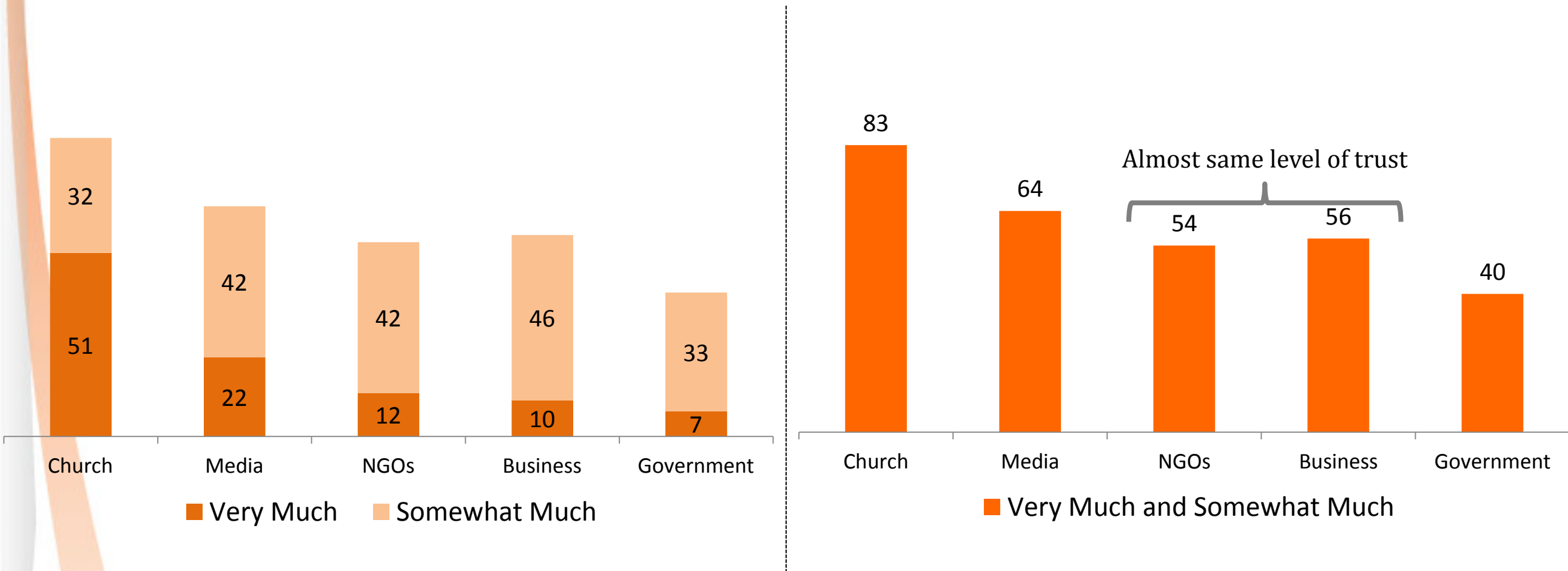
Measuring the level of trust per stakeholder group

Church is most trusted, followed by media

Kindly tell me how much or how little do you trust each institution that I will mention?

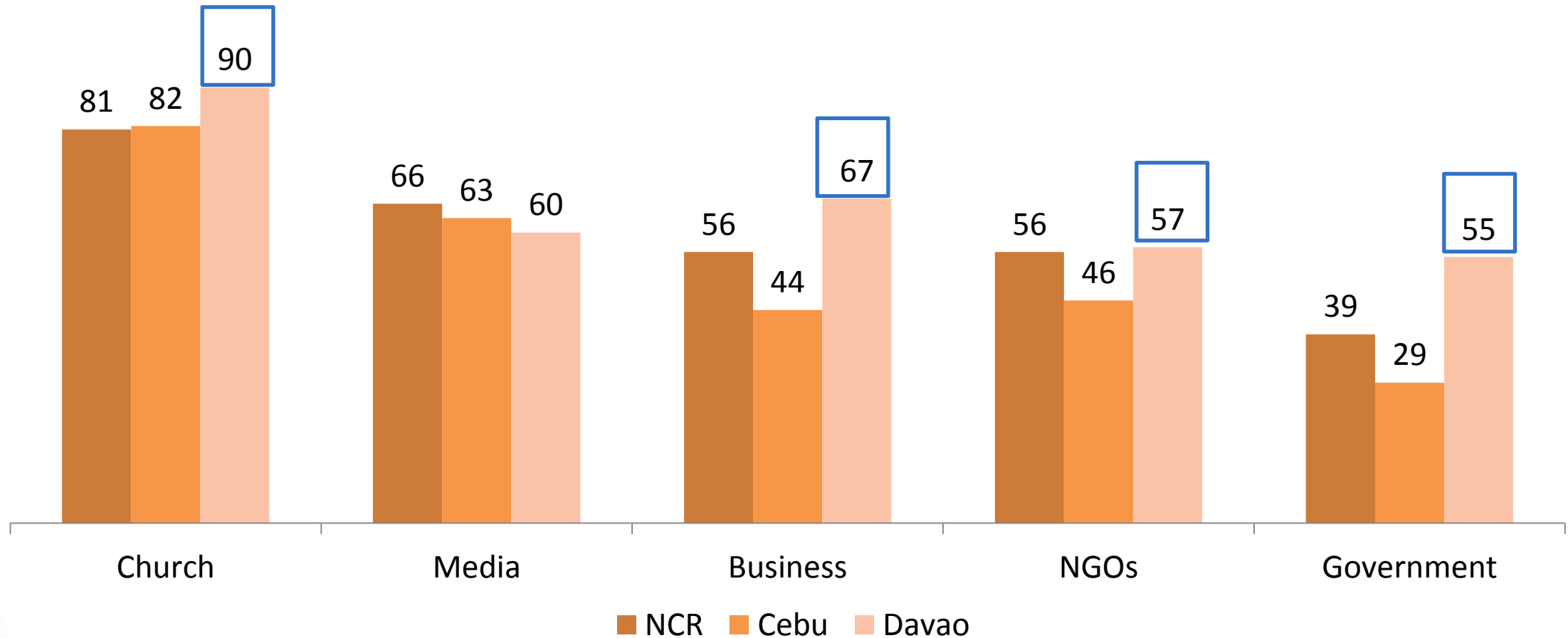


Majority of respondents have a good level of trust in institutions; except in government



Davao respondents are more trusting

Kindly tell me how much or how little do you trust each institution that I will mention?

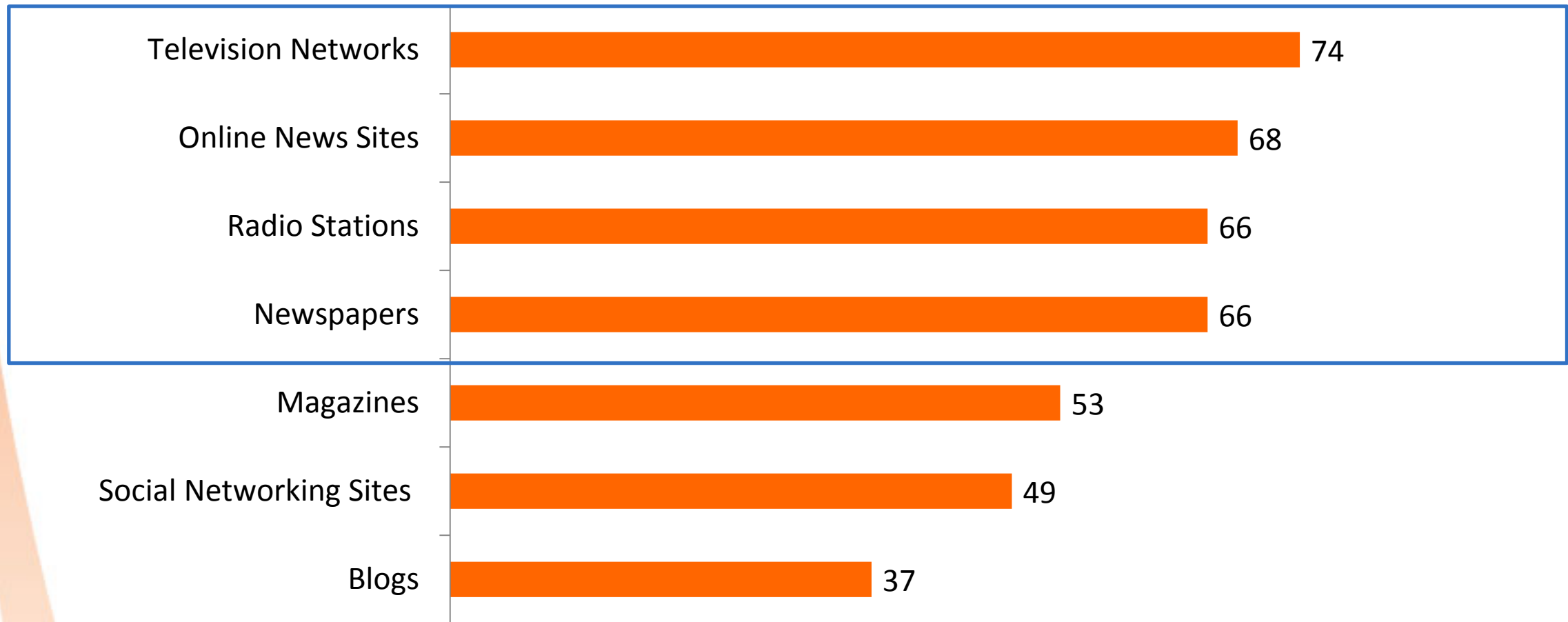


N (NCR) = 300, (Cebu) = 100, (Davao) = 100;

In percentage; Very much and somewhat much responses

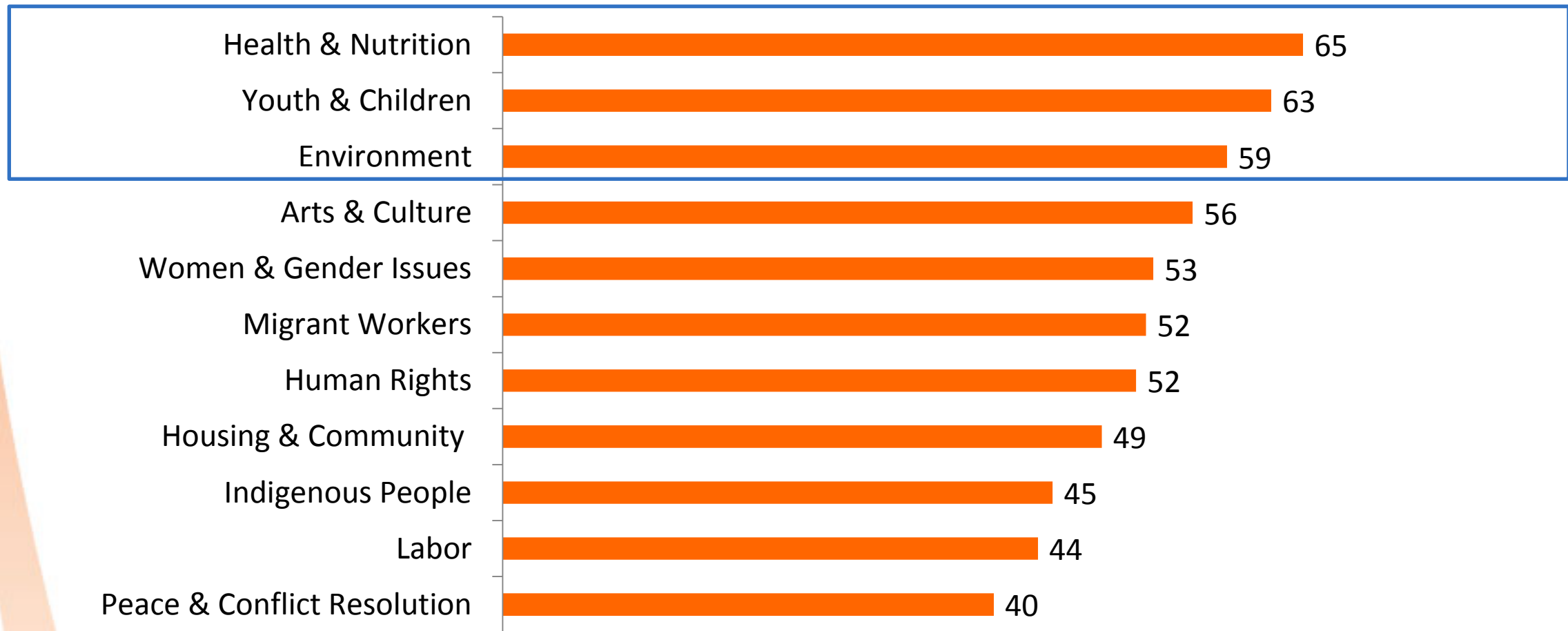
There is a high level of trust in almost all media channels; trust on blogs is low

How much or how little do you trust [media channel]?



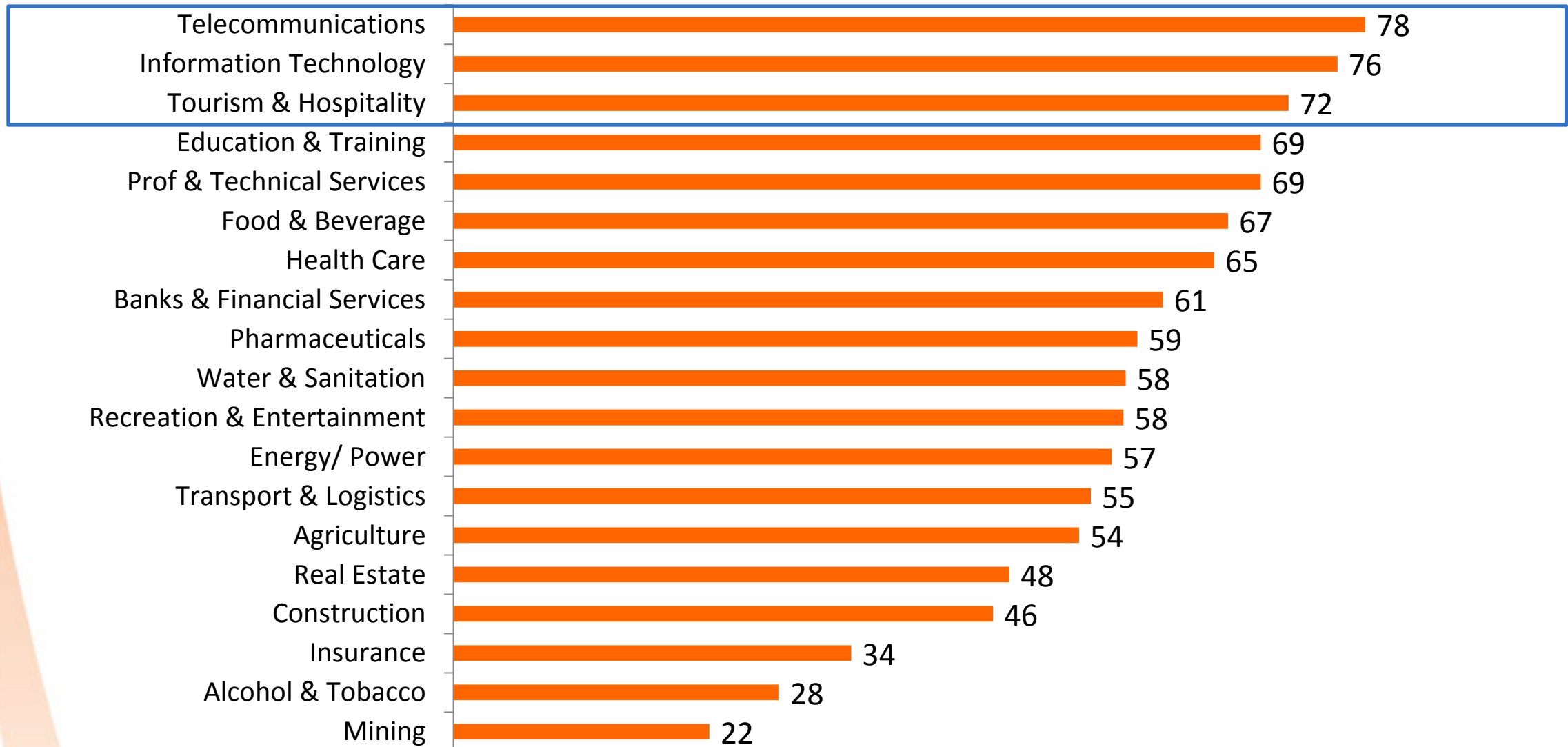
Trust in NGOs advocating for health & nutrition, youth & children, and environment is highest

How much or how little do you trust NGOs advocating/ supporting [advocacy area]?



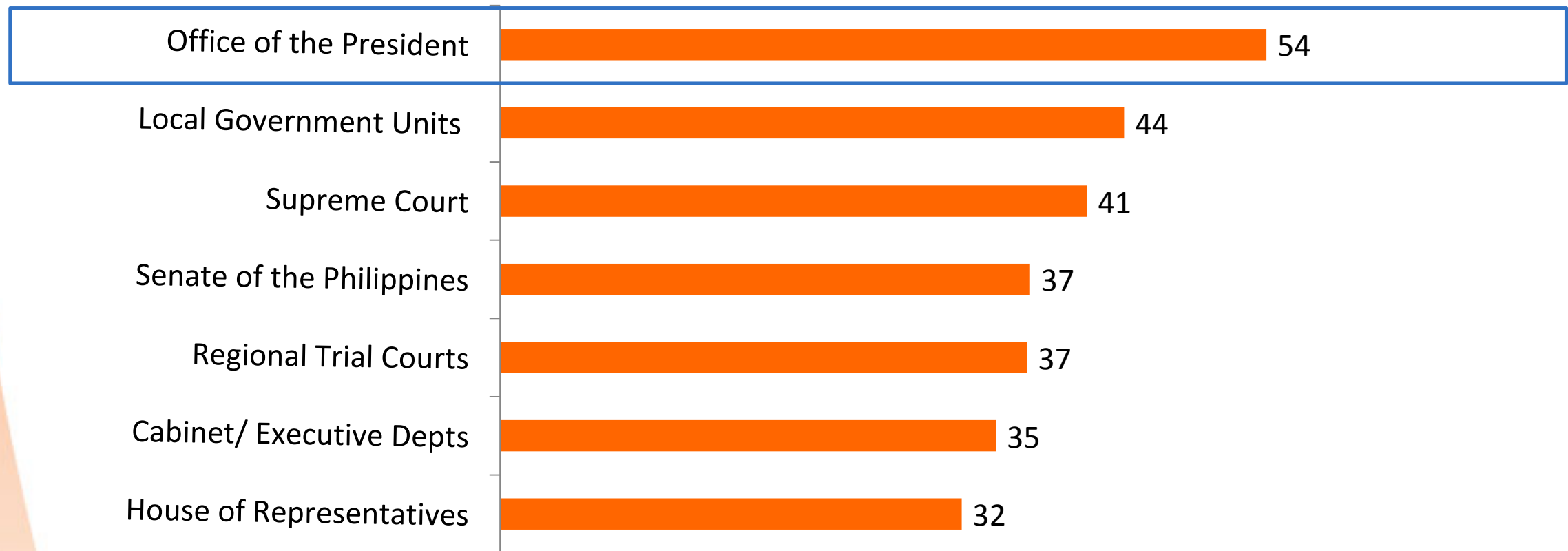
IT and Telecommunications are the most trusted industries; Mining is the least trusted

How much or how little do you trust each industry that I will mention?



Trust level on the Office of the President is much higher compared to other government offices

Kindly tell me how much or how little do you trust each institution that I will mention.





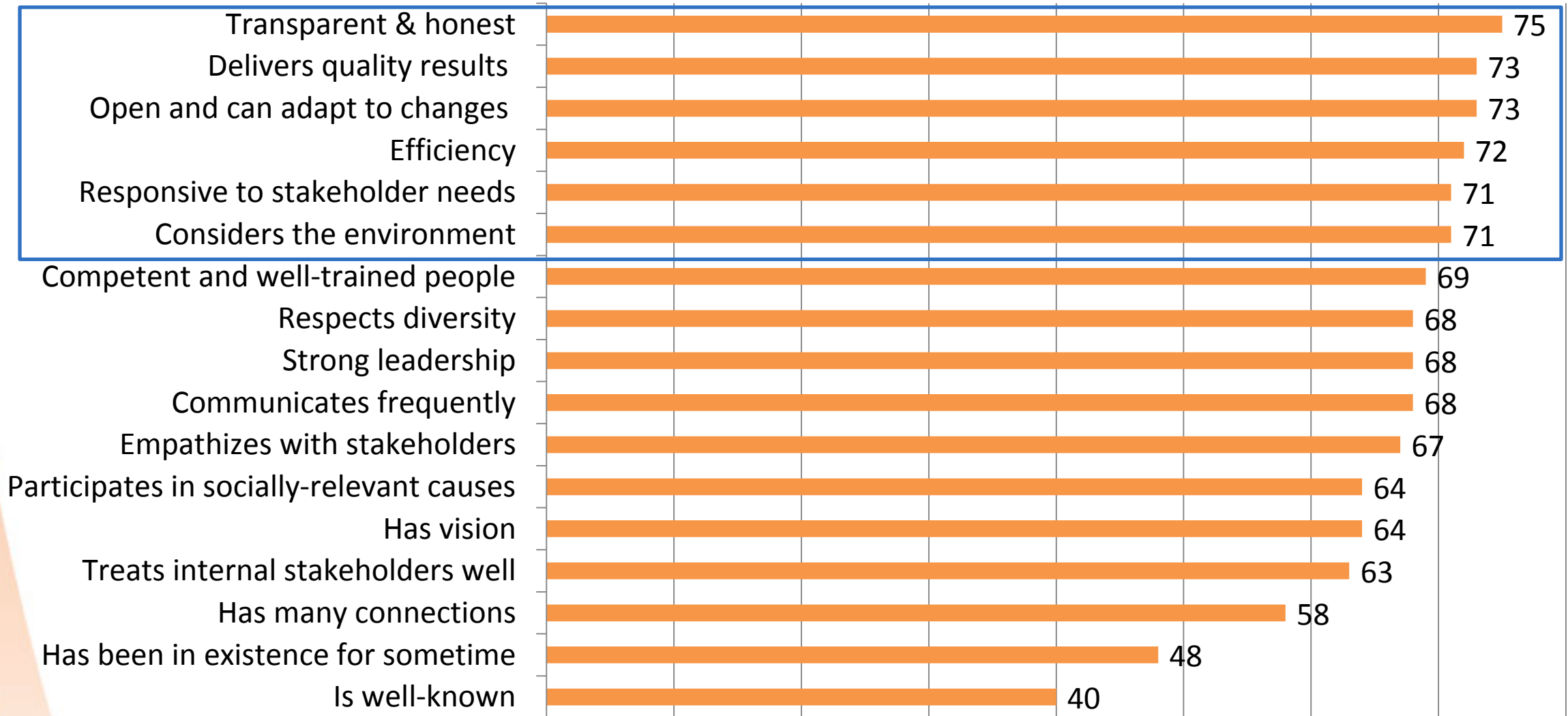
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Why trust them?

Identifying the drivers of trust in stakeholder groups

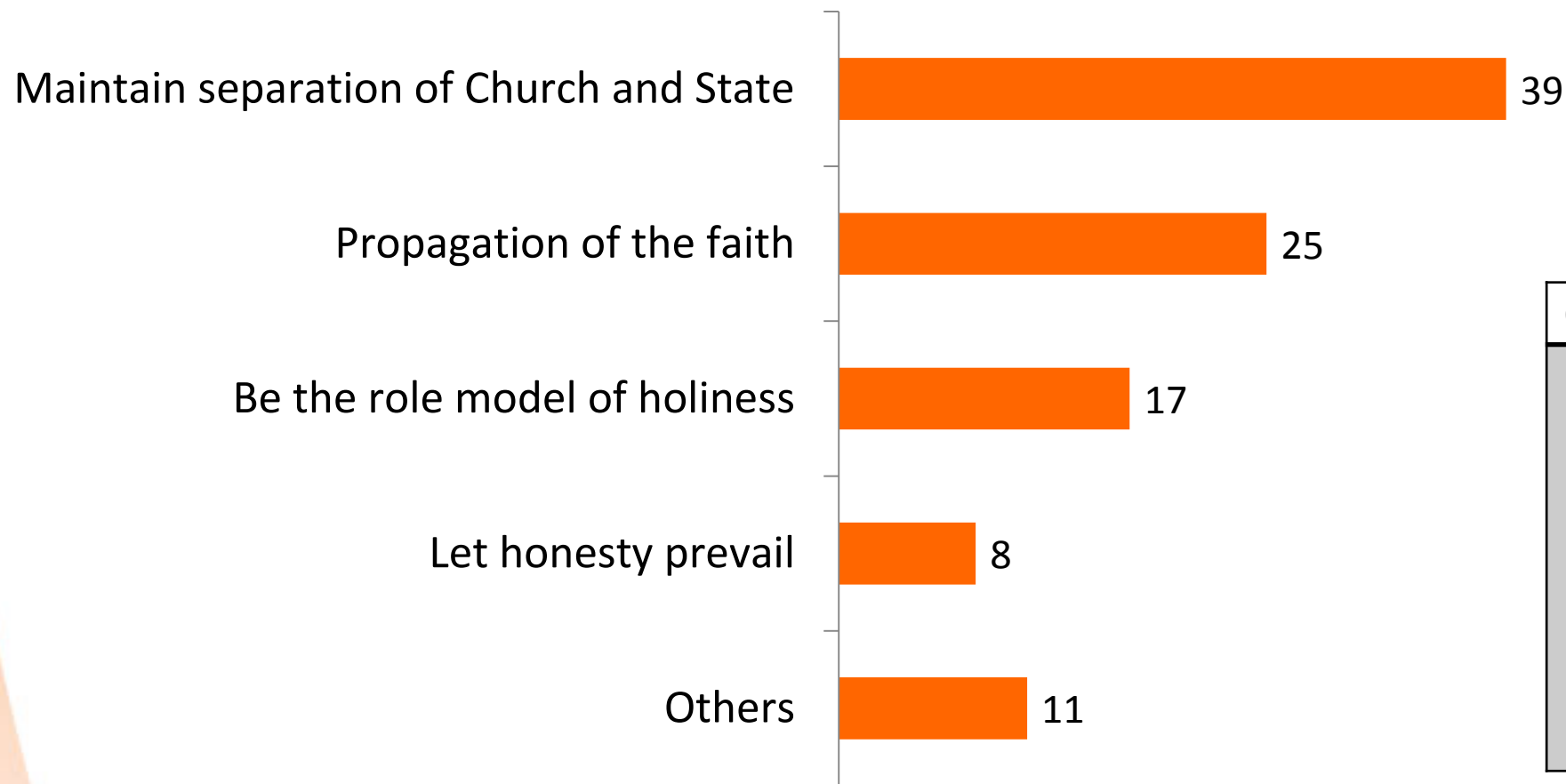
Integrity, efficiency, results, and concern for the environment are important attributes when evaluating trustworthiness

Please tell me how **important** or unimportant the following attributes are when evaluating an institution's trustworthiness?



Maintaining the separation of church and state is an important driver of trust

What qualities do you think are important for church to have in order to be trusted?



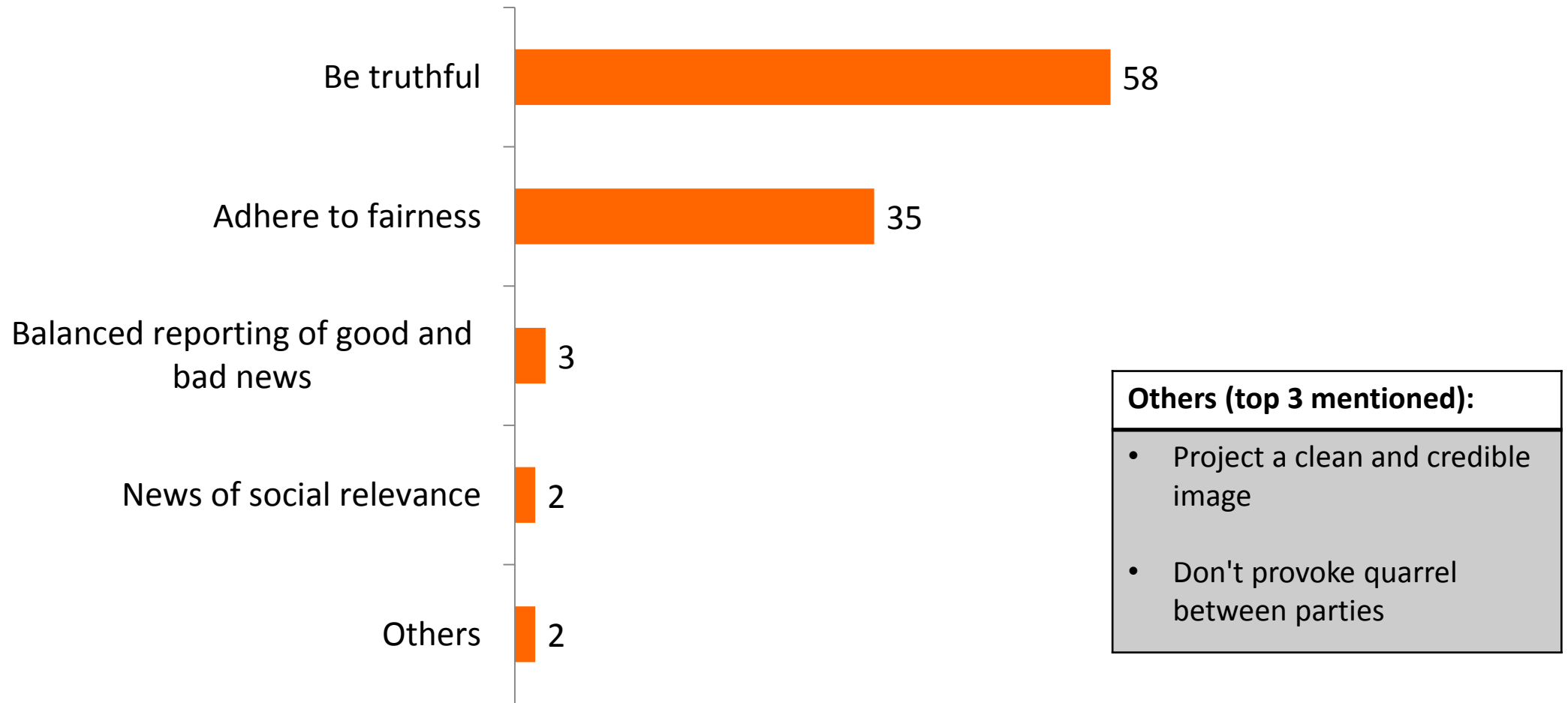
Others (top 3 mentioned):

- Fight for what is righteous – go against the RH Bill
- Charity to the street children/poor
- Open-mindedness to the changing times

N=500; In percentage; MOE = +/- 4.47%
Some figures may not total to 100 due to rounding off

Trust in media is driven by truthfulness and fairness

What qualities do you think are important for media to have in order to be trusted?

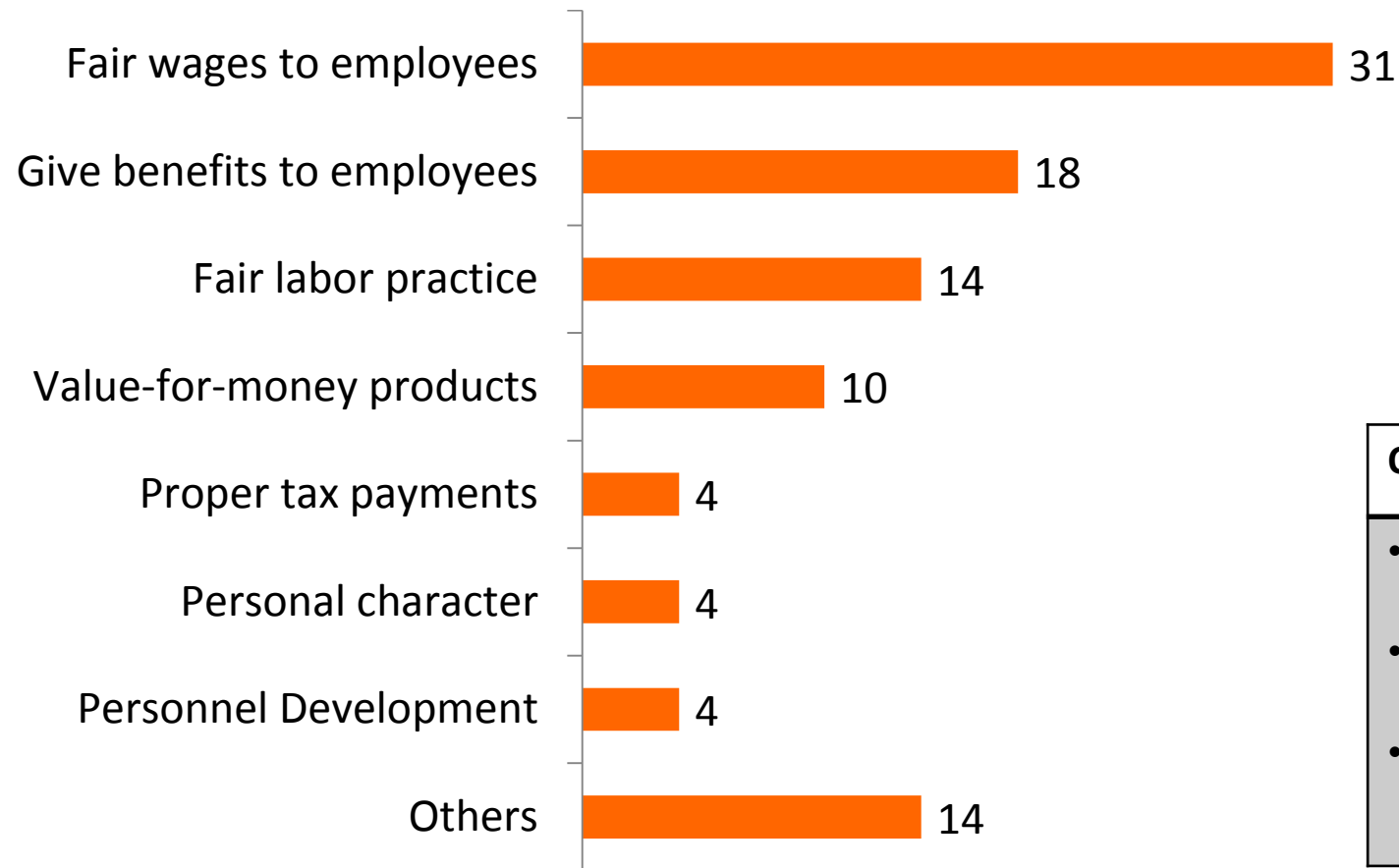


N=500; In percentage; MOE = +/- 4.47%

Some figures may not total to 100 due to rounding off

Businesses are expected to be fair with internal stakeholders

What qualities do you think are important for businesses to have in order to be trusted?



Others (top 3 mentioned):

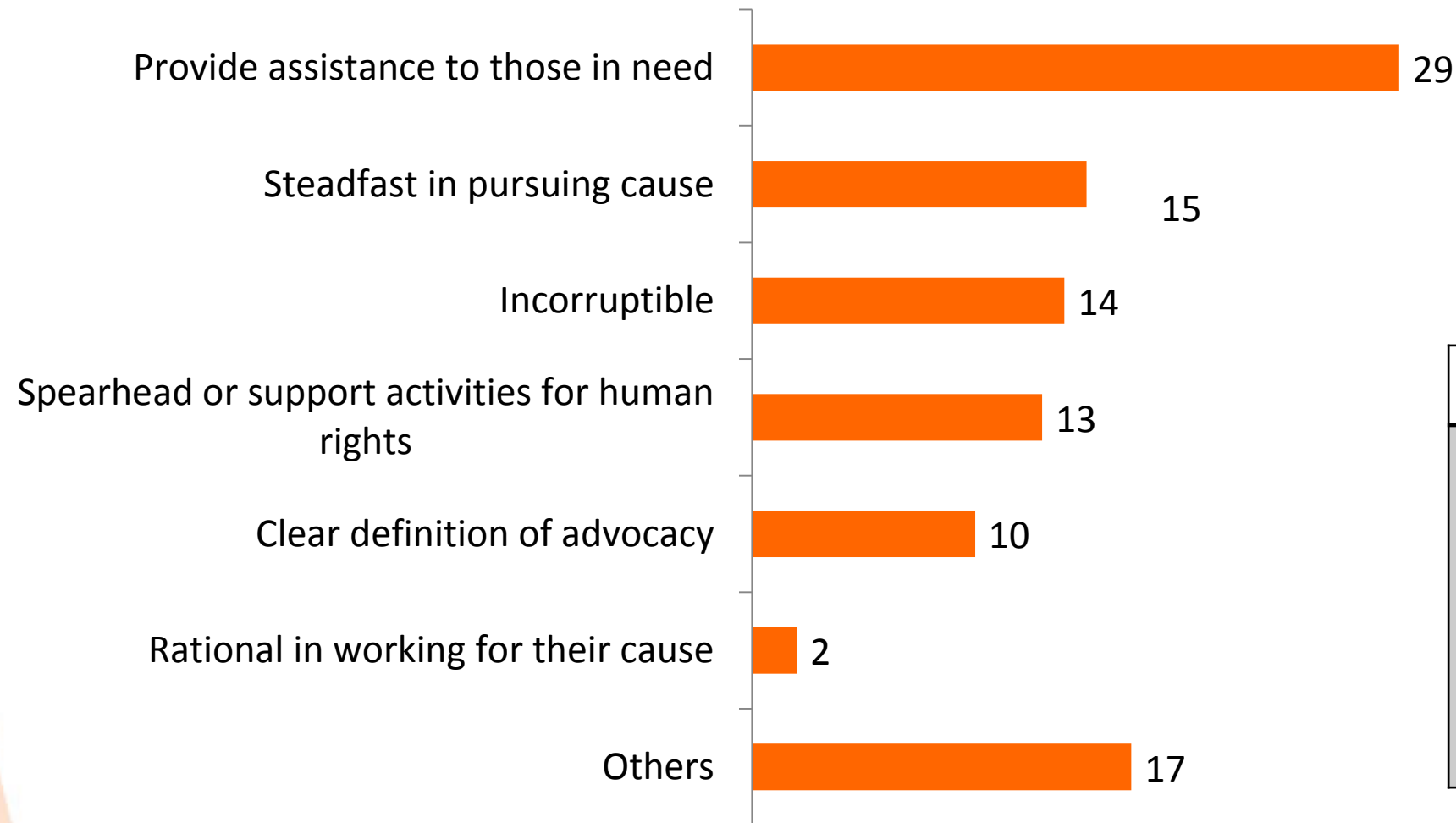
- Give overtime pay
- Pay wages/salaries on time
- Have a common minimum wage across the country

N=500; In percentage; MOE = +/- 4.47%

Some figures may not total to 100 due to rounding off

Trust in NGOs is driven not just by work for those in need but also by commitment to their cause

What qualities do you think are important for NGOs to have in order to be trusted?



Others (top 3 mentioned):

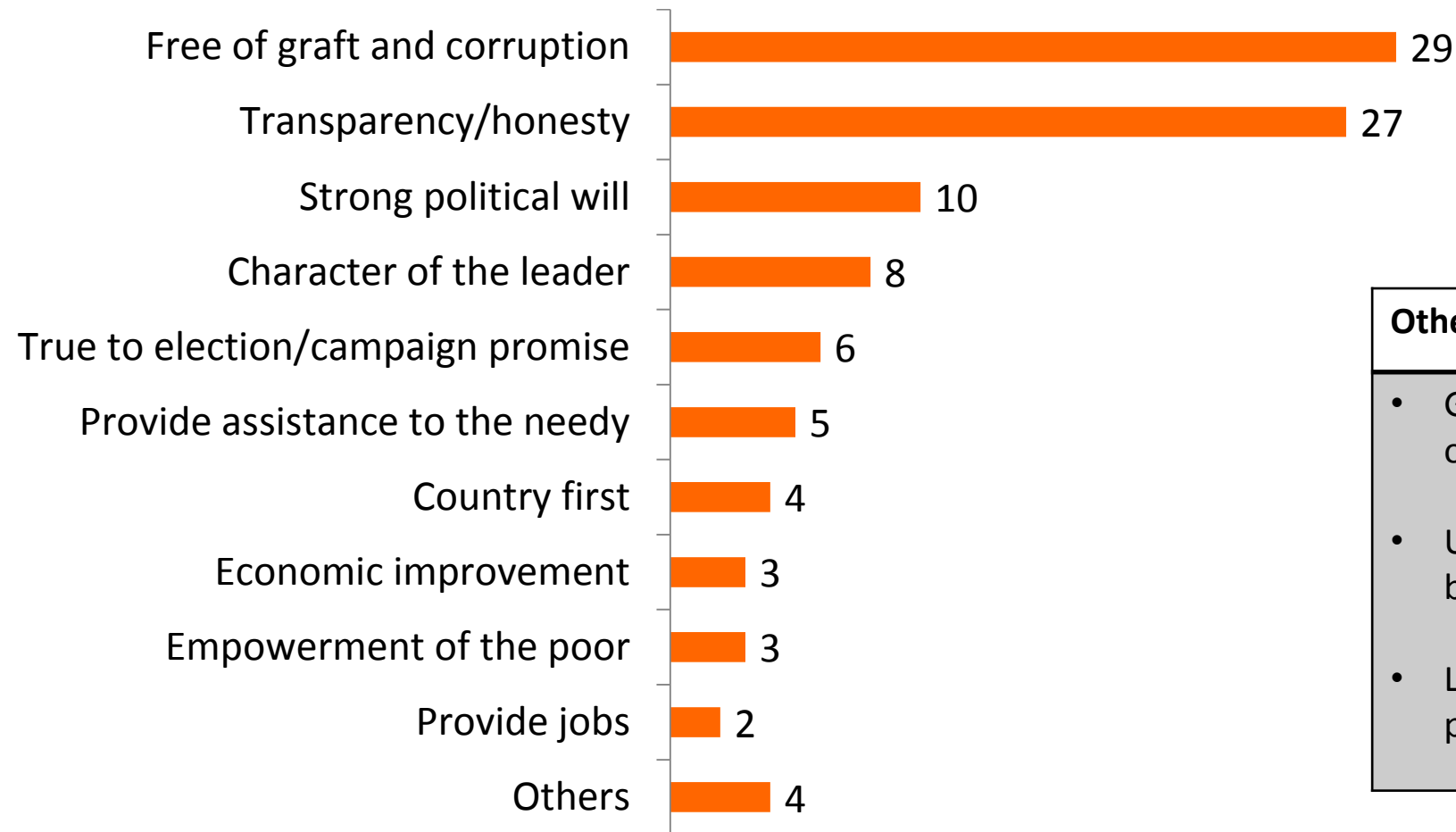
- Full accounting of monies and donations
- Don't be the cause of chaos on the streets
- Collaborative with other NGOs of related advocacies

N=500; In percentage; MOE = +/- 4.47%

Some figures may not total to 100 due to rounding off

Free of graft & corruption and transparency are key drivers of trust in government

What qualities do you think are important for government to have in order to be trusted?



Others (top 3 mentioned):

- Good/efficient management of public funds
- Unity among government branches
- Long-term solution to every problem

N=500; In percentage; MOE = +/- 4.47%

Some figures may not total to 100 due to rounding off



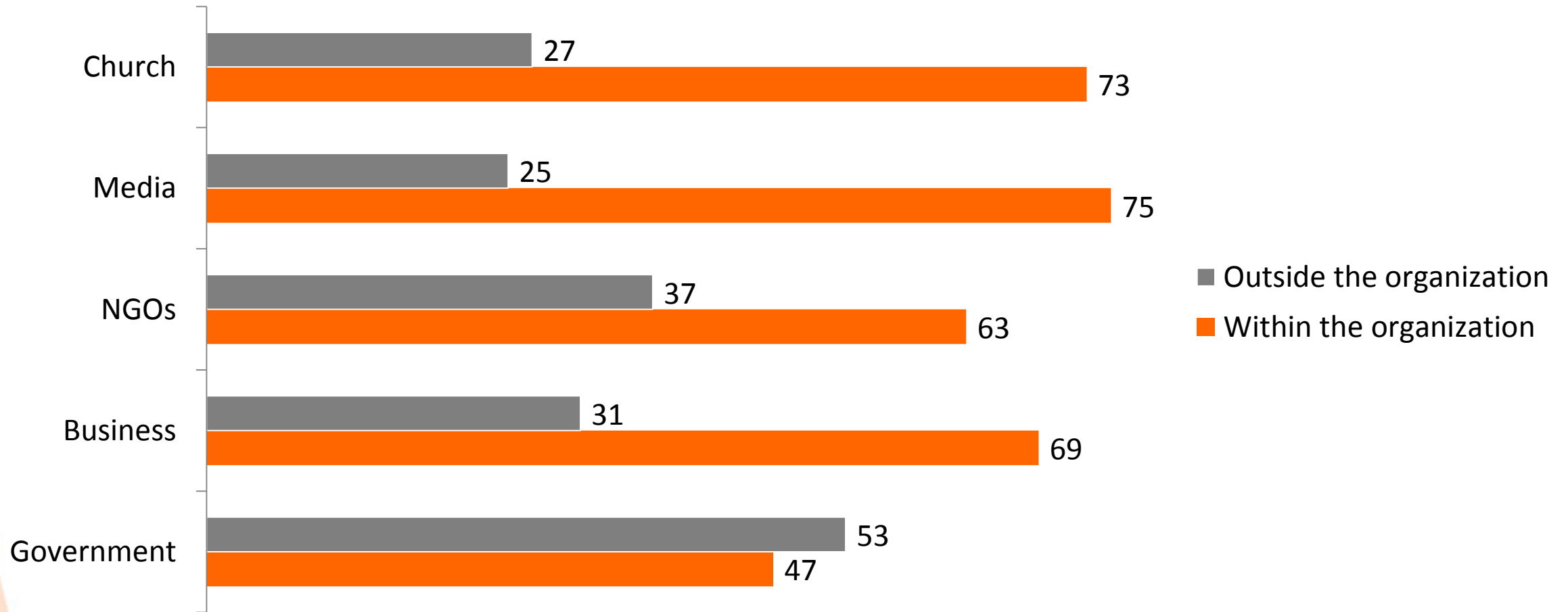
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Who should speak? Which channel is trusted?

Knowing who could be credible spokespersons and which channels should be used to deliver information

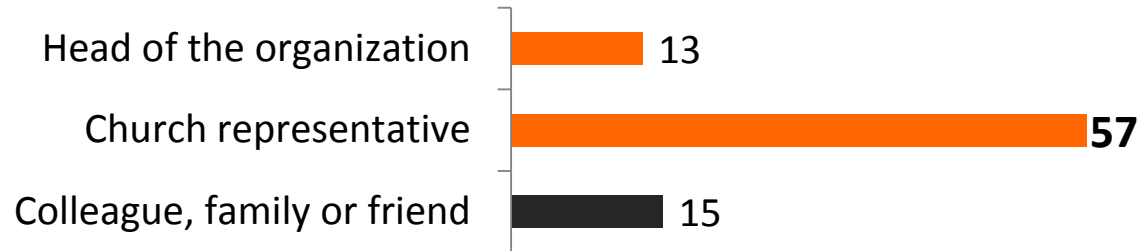
Except in government, the most trusted source of information is a representative of the organization

Who among the following **persons** would you trust the most to give credible information about *[institution]*?

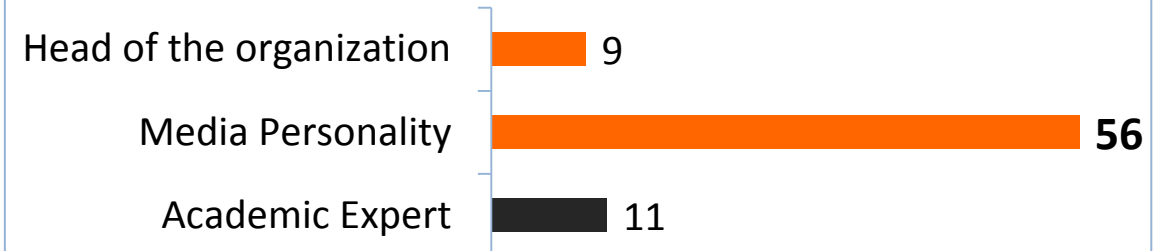


The head of the organizations is less trusted than a representative of the organization

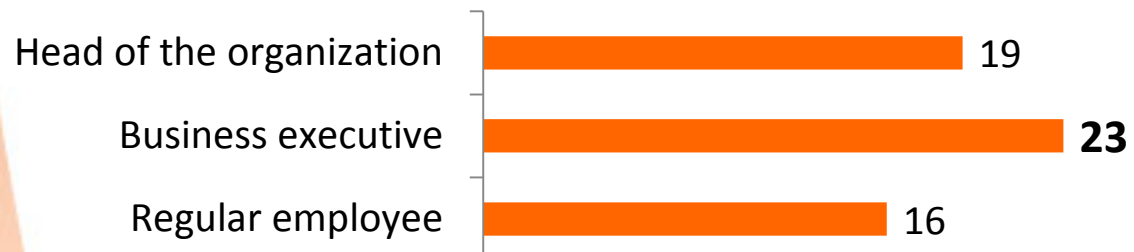
Church



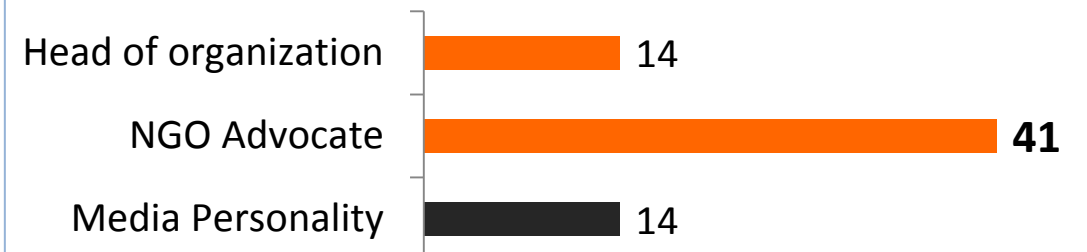
Media



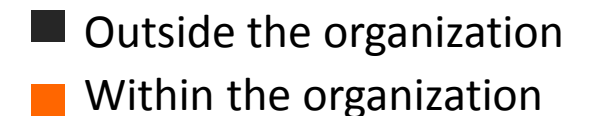
Business



NGOs



Government

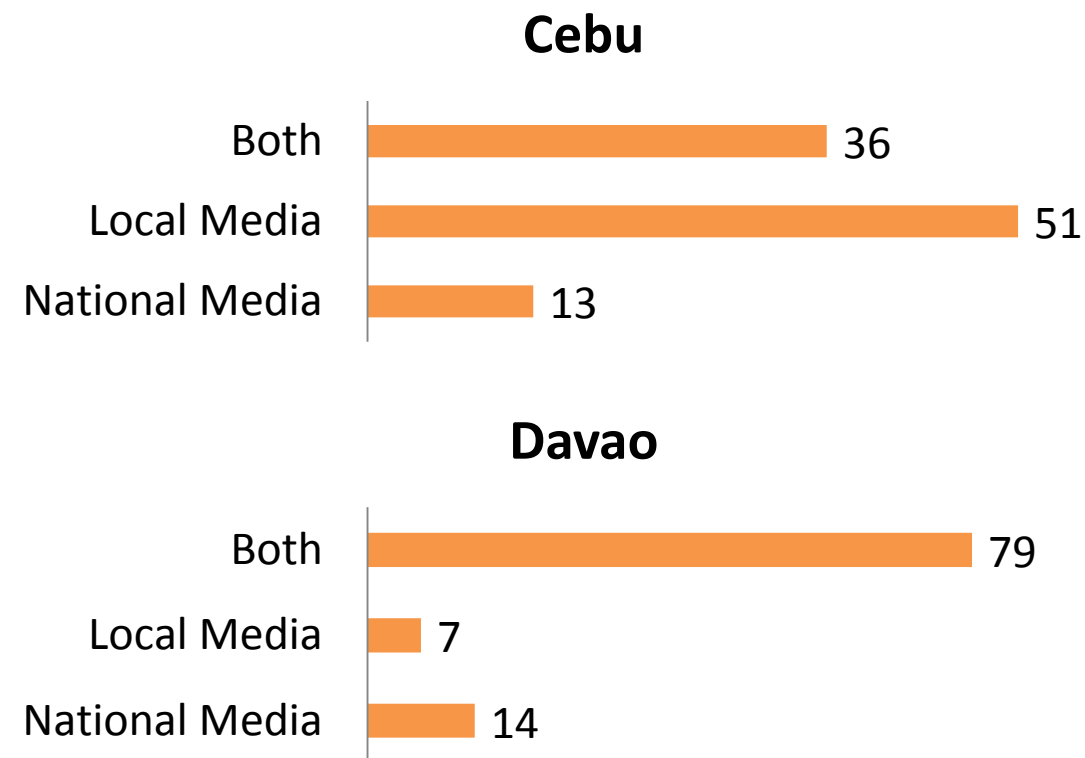
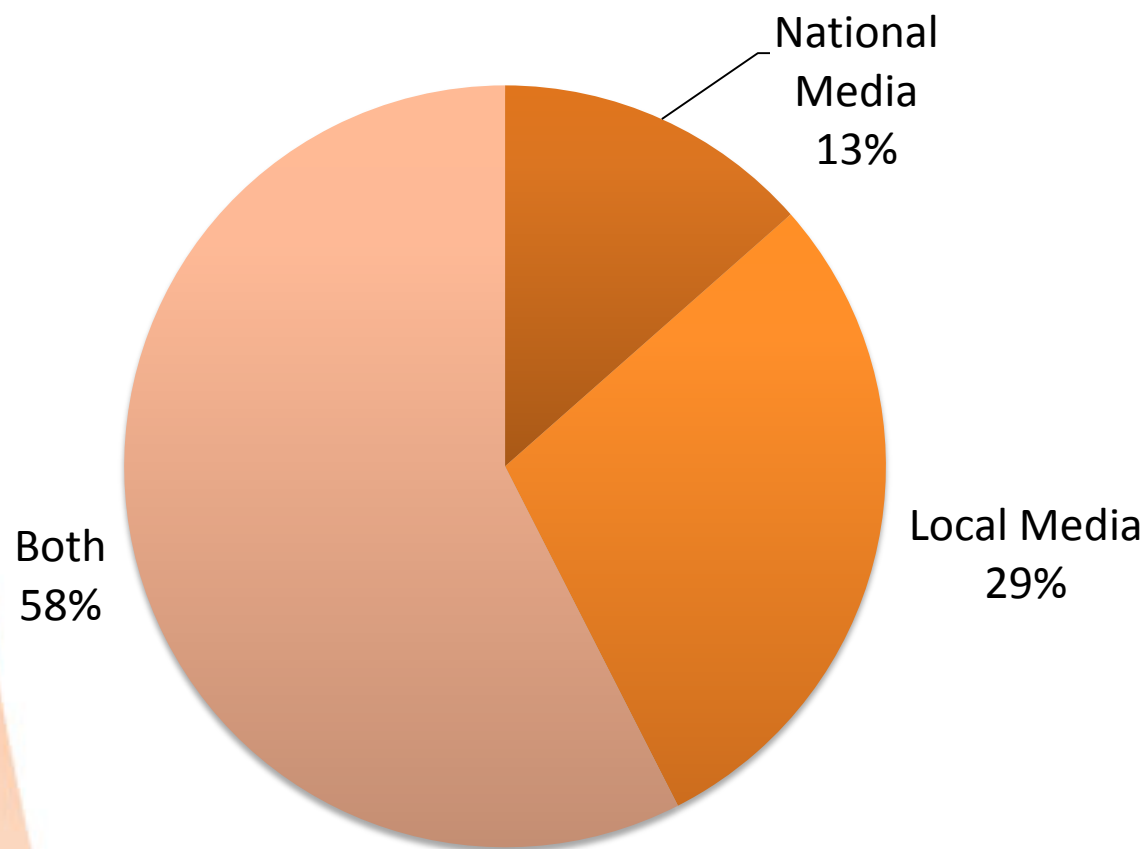


TV is the most trusted source of information about media, NGOs, business and government

Which sources do you usually turn to when you wish to get news and information about *[institution]*?

Church		Media		Business		NGOs		Government	
Friends and family	48	Television	84	Television	52	Television	66	Television	79
Television	28	Newspapers	48	Newspapers	45	Newspapers	44	Newspapers	51
Newspapers	10	Radio	26	Online news sources	23	Radio	20	Online news sources	22
Radio	4	Online news sources	15	Website	22	Website	17	Radio	14
Online news sources	3	Website	8	Online search engine	16	Online news sources	14	Online search engine	10
Website	3	Friends & family	6	SNS	13	Friends & family	13	Website	9
Online search engine	2	Online search engine	5	Friends & family	11	SNS	10	SNS	6
SNS	1	SNS	4	Radio	9	Online search engine	8	Friends & family	5
Magazines	1	Magazines	3	Magazines	9	Magazines	7	Magazines	2

Respondents turn to both national and local media for credible information on provincial/ local events



Local media are preferred sources of news in Cebu (51%) than in Davao (7%)

Summary of Findings

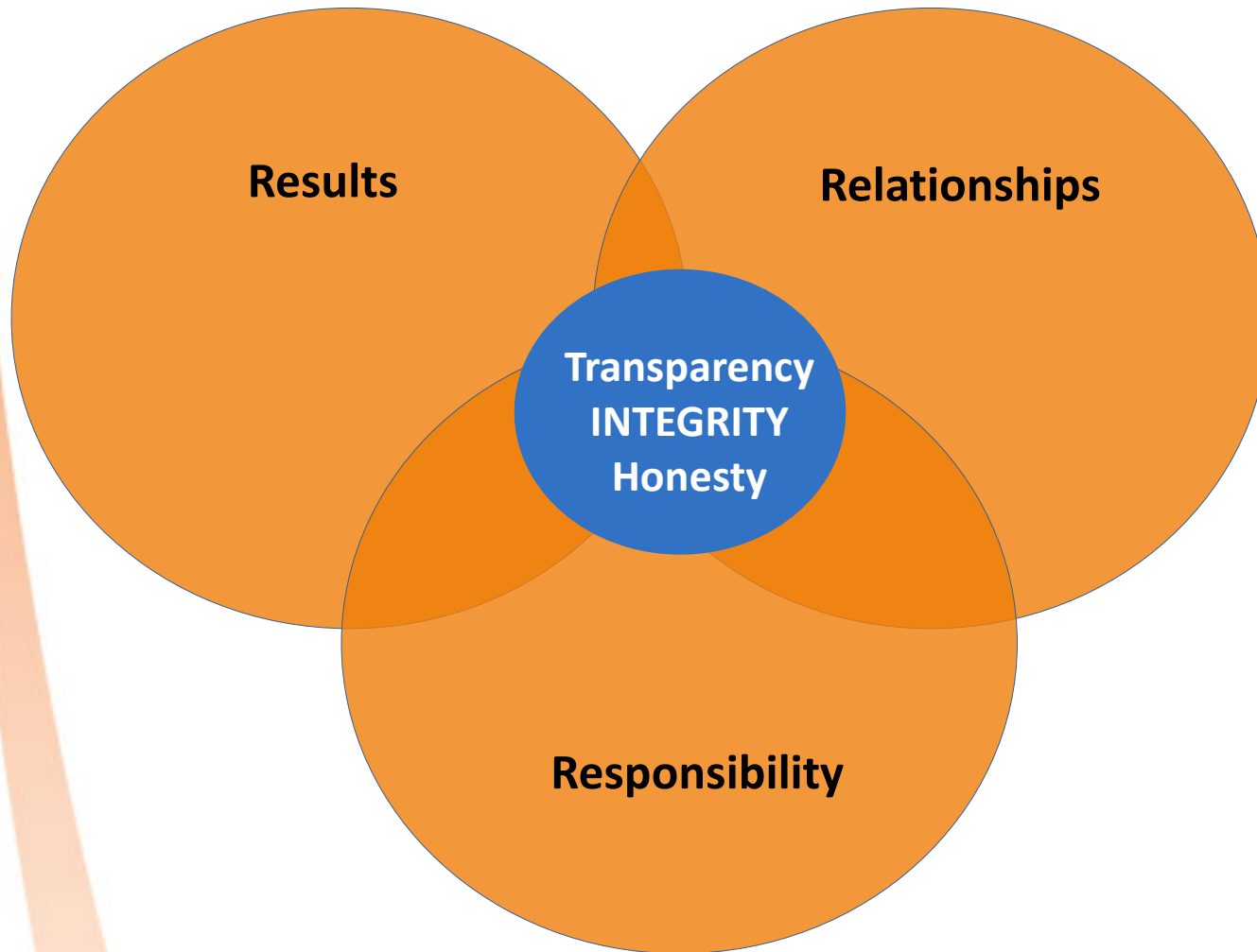
- Overall, the Church is the most trusted institution in the country, followed by the media. However, majority of respondents have a good level of trust in institutions, except in the government.
- Online news sites are now one of the trusted channels of information but there is still a high level of trust in traditional media channels: television, radio and newspapers.
- Across all institutions internal spokespersons are the most trusted sources of information, except in government where a third party is seen as the most credible source of information.
- When evaluating the trustworthiness of an institution six attributes were considered to be very important:
 - ✓ transparency and honesty
 - ✓ quality results
 - ✓ openness and adaptability to the changing times
 - ✓ responsiveness to stakeholders
 - ✓ concern for the environment



Insights

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Circles of Trust



The current communication landscape, coupled with people's frequent media exposure, results to increased stakeholder expectations and public skepticism. Trust consequently becomes more difficult to gain. Various dimensions have to be addressed by institutions aiming to gain public trust. Although the government, being in the limelight more often, is the most impacted institution, other stakeholder groups like businesses and NGOs are also affected.

The circles of trust show the key drivers of trust on institutions/ organizations. At the core of this trust architecture is integrity. Transparency and honesty are consistent parameters of stakeholders when assessing an organization's trustworthiness. How transparent are organizations in their processes? How sincere and honest/ truthful are they?

Surrounding integrity are three other requisites, namely:

- Results - is your organization able to deliver on its promise?
- Relationships – is your organization reaching out to its stakeholders and responding to their needs?
- Responsibility – is your organization a responsible member of the community

Things to Ponder On

Why is this happening?

- Given today's communication and media landscape, how exposed, visible is my organization? Consequently, how accountable are we to stakeholders? What are the expectations on us?
- What do we do as an organization that can help increase trust on us?
 - What are we doing to deliver expected **results**?
 - What **relationship** do we have with our stakeholders, employees?
 - How **socially responsible** are we perceived by our stakeholders? Do we have (and communicate) sustainability initiatives?
 - Is **integrity** important in our organization? Are we transparent/honest?
- Who is our current spokesperson? Is he trusted and credible?
- Have we maximized various communication channels to further our objectives? How can we generate better awareness on milestones?

What should we say to gain trust?

Who should communicate it?

In which channel should we communicate it?

THANK YOU

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