



# 2015

## EDELMAN TRUST BAROMETER ITALY RESULTS

# EDELMAN'S *15<sup>th</sup> Annual* TRUST BAROMETER METHODOLOGY



## *Online Survey in 27 Countries*

- 33,000 respondents
- 7 years in 20+ markets
- 10 years in 10+ markets



## *General Online Population*

- 1,000 respondents per country surveyed
- Ages 18+
- 4 years in 25+ markets



## *Informed Public*

- 500 respondents in U.S. and China, and 200 in other countries
- Ages 25-64
- College-educated
- In top 25% of household income per age group in each country
- Report significant media consumption and engagement in business news and public policy
- 15 years of data

# ITALIA IN RIPRESA:

NUMBER OF TRUSTER  
COUNTRIES AT AN  
ALL-TIME LOW

TRUSTERS

NEUTRAL

DISTRUSTERS

2014		2015	
GLOBAL	56	GLOBAL	55
China	79	UAE	84
UAE	79	India	79
Singapore	73	Indonesia	78
Indonesia	72	China	75
India	69	Singapore	65
Malaysia	65	Netherlands	64
Canada	60	Brazil	59
Netherlands	60	Mexico	59
Hong Kong	59	Malaysia	56
Mexico	59	Canada	53
Australia	58	Australia	52
Brazil	57	France	52
Germany	57	U.S.	52
Argentina	53	Germany	50
U.K.	52	Italy	48
S. Korea	51	S. Africa	48
Sweden	51	Hong Kong	47
S. Africa	50	S. Korea	47
U.S.	49	U.K.	46
France	46	Argentina	45
Japan	44	Poland	45
Italy	43	Russia	45
Turkey	41	Spain	45
Ireland	39	Sweden	45
Spain	39	Turkey	40
Russia	37	Ireland	37
Poland	35	Japan	37

TRUSTERS  
from 30% to  
22% in 2015

DISTRUSTERS  
from 33% to  
48% in 2015



Informed  
Public



GLOBAL

The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. 27-country global total.

# MA C'E UN GAP TRA LA POPOLAZIONE GENERALE E IL PUBBLICO INFORMATO:

DEFICIT NEARLY 10  
POINTS LOWER AMONG  
GENERAL POPULATION,  
WITH AN AVERAGE 3  
POINT DECREASE IN  
TRUST ACROSS ALL  
COUNTRIES



TRUSTERS

NEUTRAL

DISTRUSTERS

2015	
GLOBAL	55
UAE	84
India	79
Indonesia	78
China	75
Singapore	65
Netherlands	64
Brazil	59
Mexico	59
Malaysia	56
Canada	53
Australia	52
France	52
U.S.	52
Germany	50
Italy	48
S. Africa	48
Hong Kong	47
S. Korea	47
U.K.	46
Argentina	45
Poland	45
Russia	45
Spain	45
Sweden	45
Turkey	40
Ireland	37
Japan	37

2015	
GLOBAL	46
India	68
UAE	68
Indonesia	67
China	63
Singapore	60
Malaysia	53
Canada	52
Netherlands	52
Mexico	51
Brazil	50
Hong Kong	47
U.S.	44
Argentina	43
Australia	42
Germany	42
Italy	42
S. Africa	42
Russia	40
U.K.	39
France	38
S. Korea	38
Sweden	37
Poland	36
Spain	36
Turkey	35
Japan	34
Ireland	32

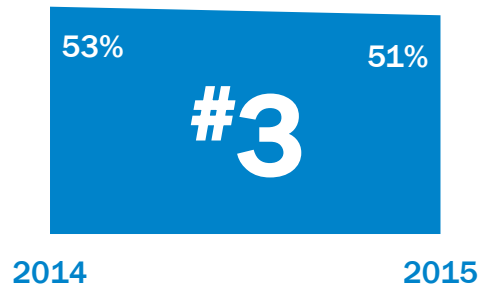
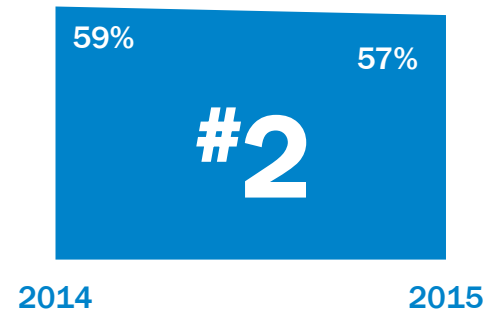
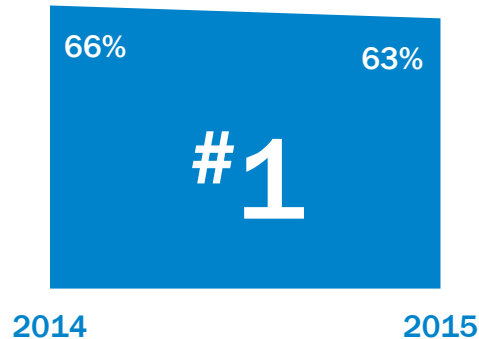


Nearly 2/3  
of countries are now  
**DISTRUSTERS**  
among the General  
Online Population

# FIDUCIA IN CALO IN NGO, BUSINESS, MEDIA, MA NON NEI GOVERNI



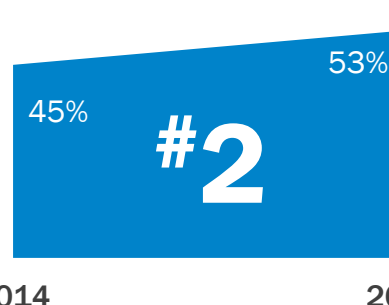
TRUST IN THE FOUR INSTITUTIONS OF GOVERNMENT, BUSINESS, MEDIA AND NGOS, 2014 VS. 2015



Q11-14. [TRACKING] 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 Publics in 27-country global total.

# ITALIA IN CONTROTEDENZA: FIDUCIA IN AUMENTO IN TUTTE LE CATEGORIE

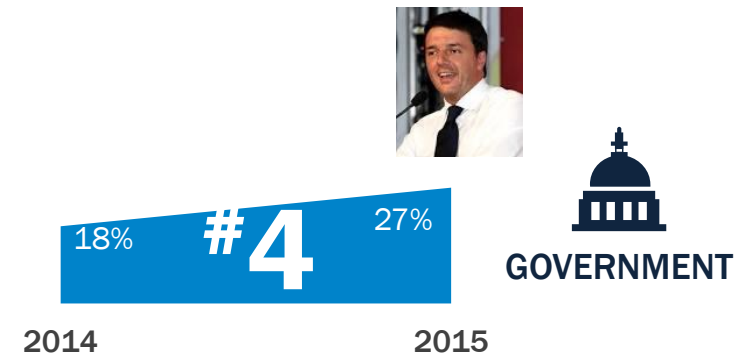
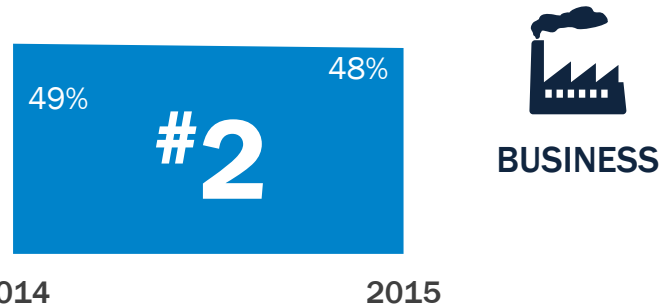
TRUST IN THE FOUR INSTITUTIONS OF GOVERNMENT, BUSINESS, MEDIA AND NGOS IN ITALY, 2014 VS. 2015



Q11-14. [TRACKING] 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 Publics in Italy.

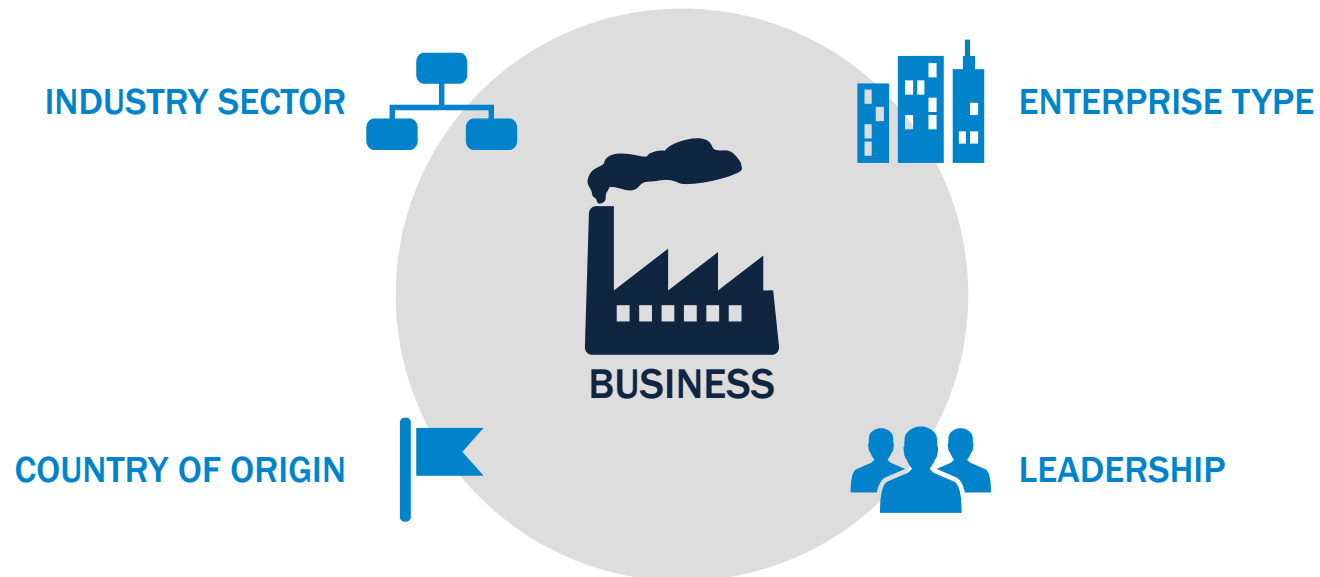
# E PER L'OPINIONE PUBBLICA C'È SOPRATTUTTO UN "EFFETTO RENZI"

TRUST IN THE FOUR INSTITUTIONS OF GOVERNMENT, BUSINESS, MEDIA AND NGOS IN ITALY, 2014 VS. 2015



Q11-14. [TRACKING] 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 in Italy.

# 4 FATTORI CHIAVE CONDIZIONANO LA FIDUCIA NELLE IMPRESE



**All are showing** similar patterns of a post-recovery increase in trust, followed by new declines in the last 12 – 18 months

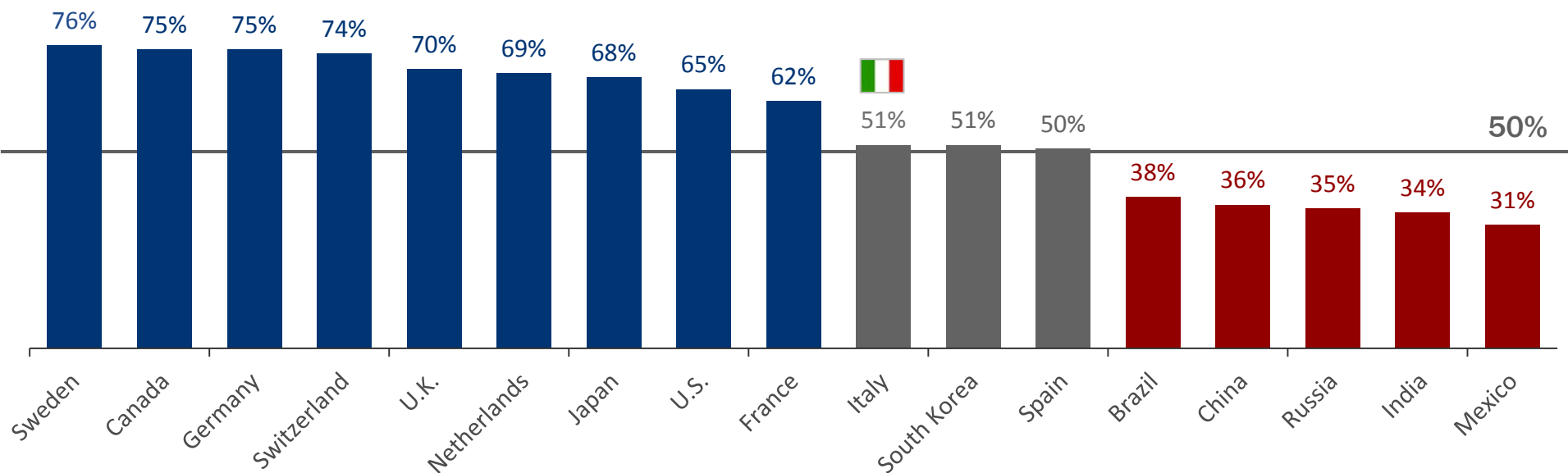


# PAESE D'ORIGINE: IL “MADE IN ITALY” FRENA



2015

Most Trusted

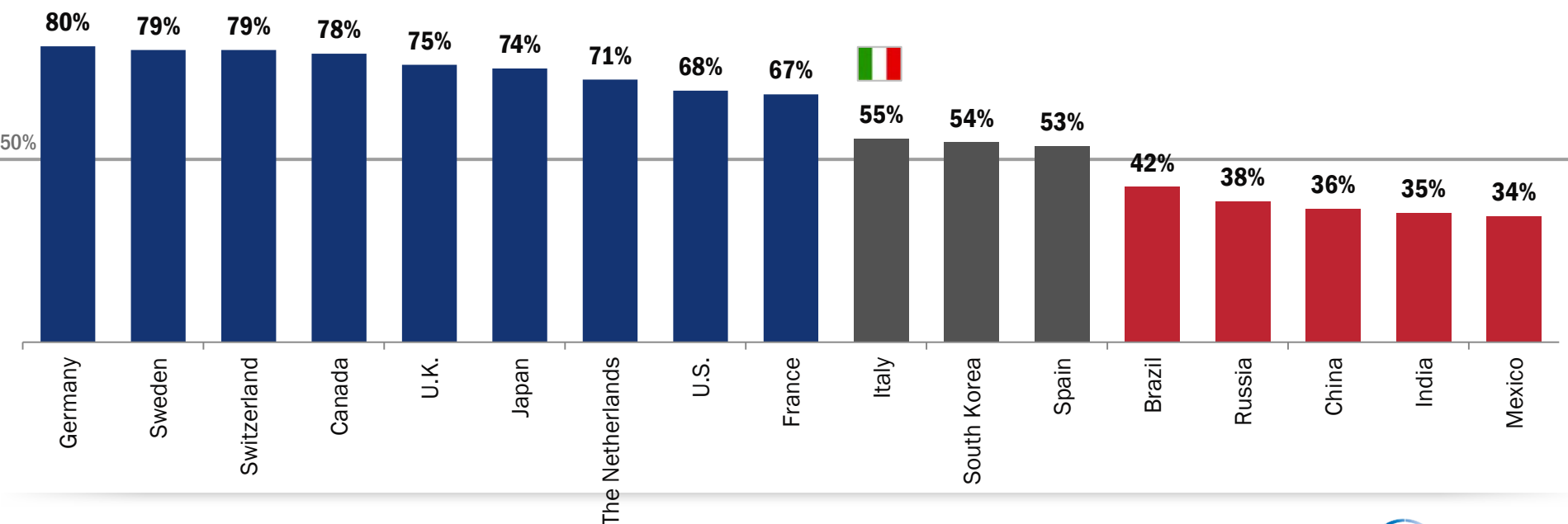


Q26-Q42. [TRACKING] Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Publics, 27-country global total.

# PAESE D'ORIGINE: L'ITALIA PERDE TERRENO RISPETTO AL 2014

2014

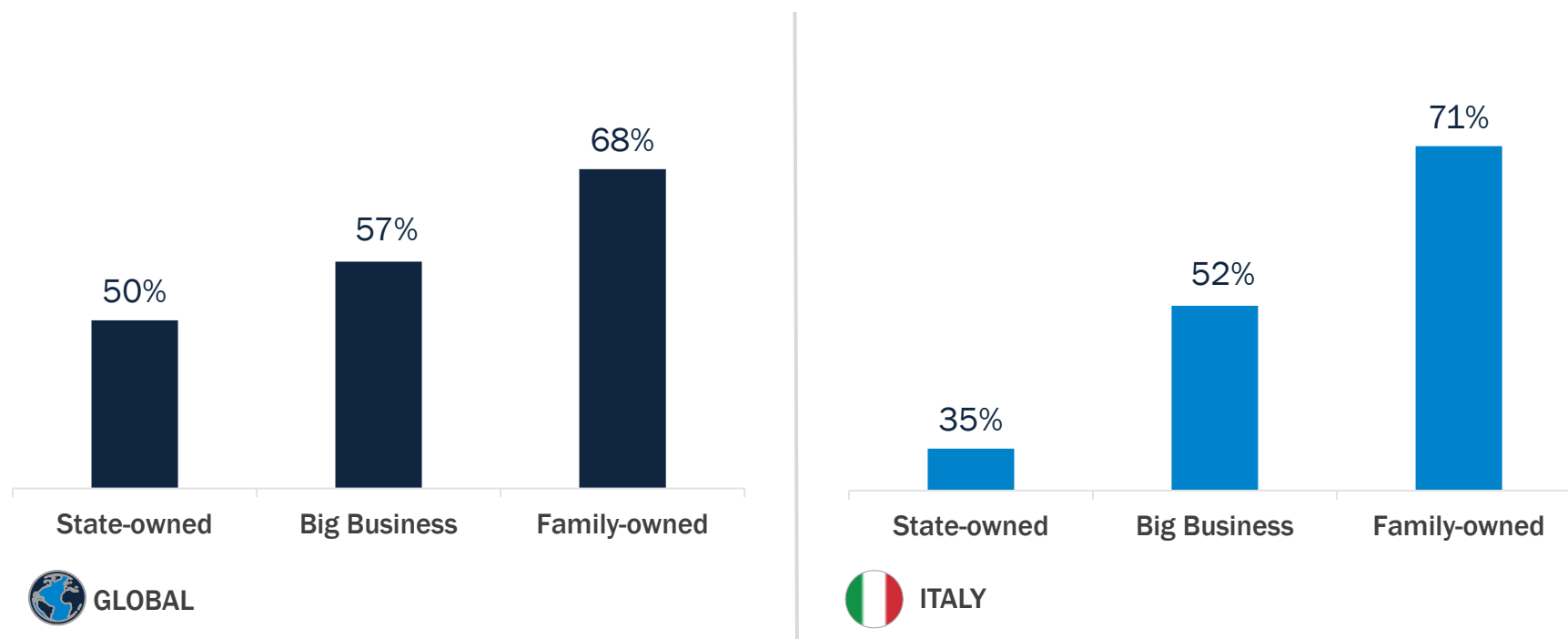
M O S T   T R U S T E D



# TIPO DI IMPRESA: IN ITALIA PIU' FIDUCIA ALLE AZIENDE FAMILIARI

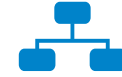


TRUST IN DIFFERENT TYPES OF BUSINESS, GLOBAL VS. ITALY



Q15-17C. Thinking about different types of businesses, please indicate how much you trust each type of business 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 Publics, in Italy and 27-country global total.

# SETTORI INDUSTRIALI: IN FLESSIONE IL TECH, I MEDIA FANALINO DI CODA

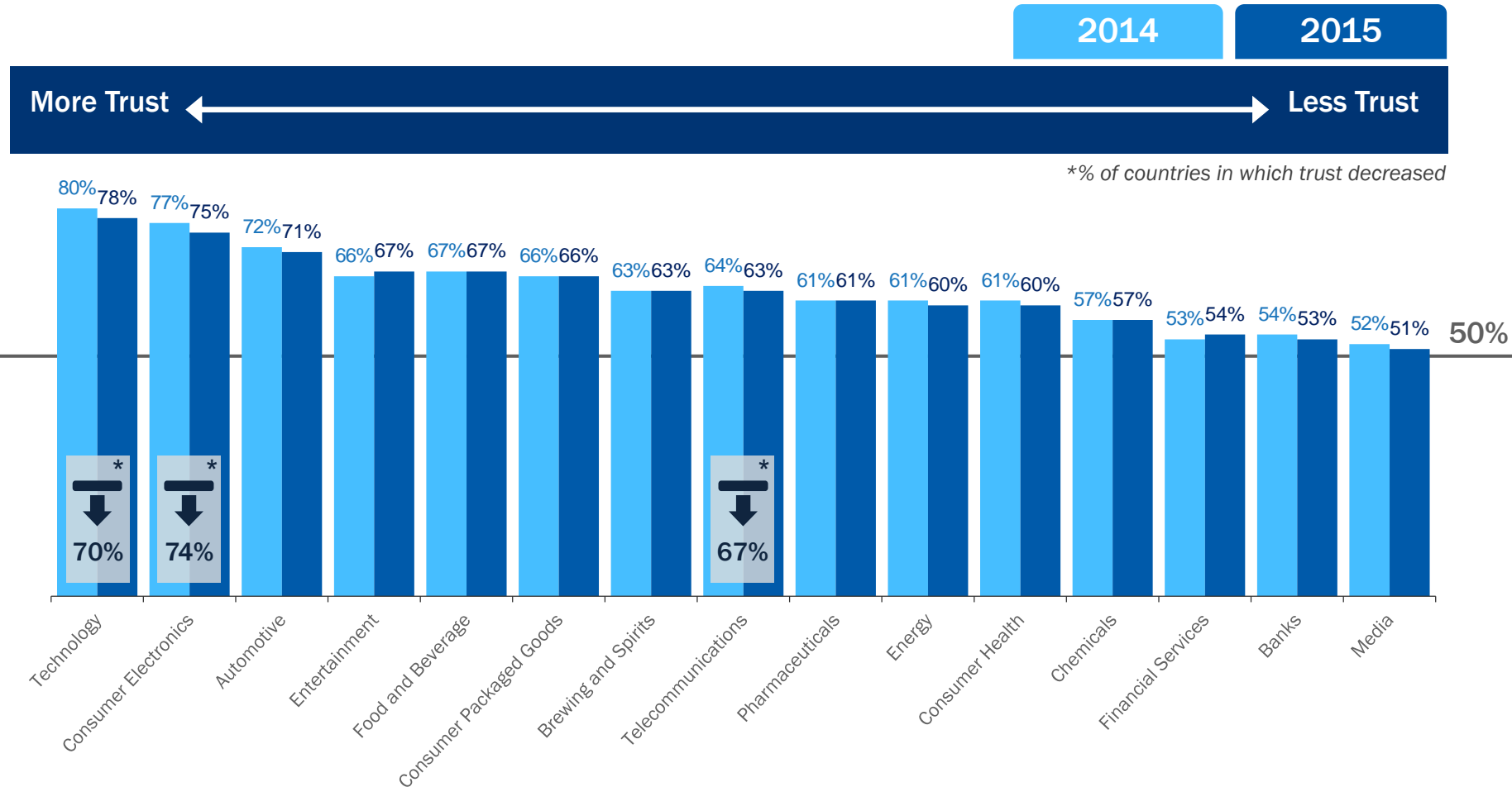


Informed  
Public



GLOBAL

TRUST IN INDUSTRIES 2014 VS 2015, DECLINES COMPARED TO 2014



Q43-60. [TRACKING] Please indicate how much you trust businesses in each of the following industries to do what is right. Again please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Publics, 27-country global total.

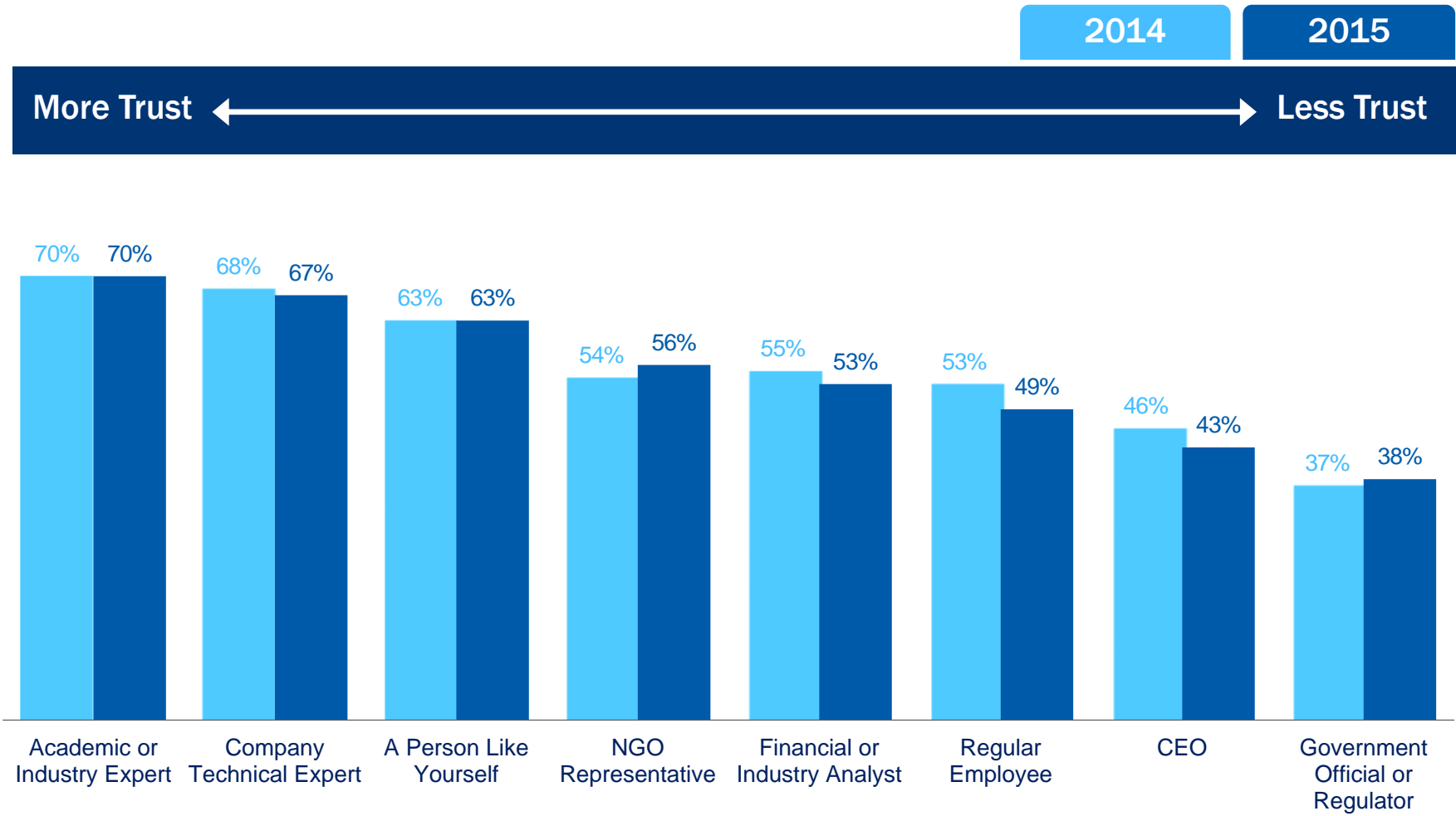
# LEADERSHIP: ESPERTI E “PERSONE COME ME” CREDIBILI IL DOPPIO DEI CEO



Informed  
Public



CREDIBILITY OF SPOKESPERSONS, 2014 VS. 2015

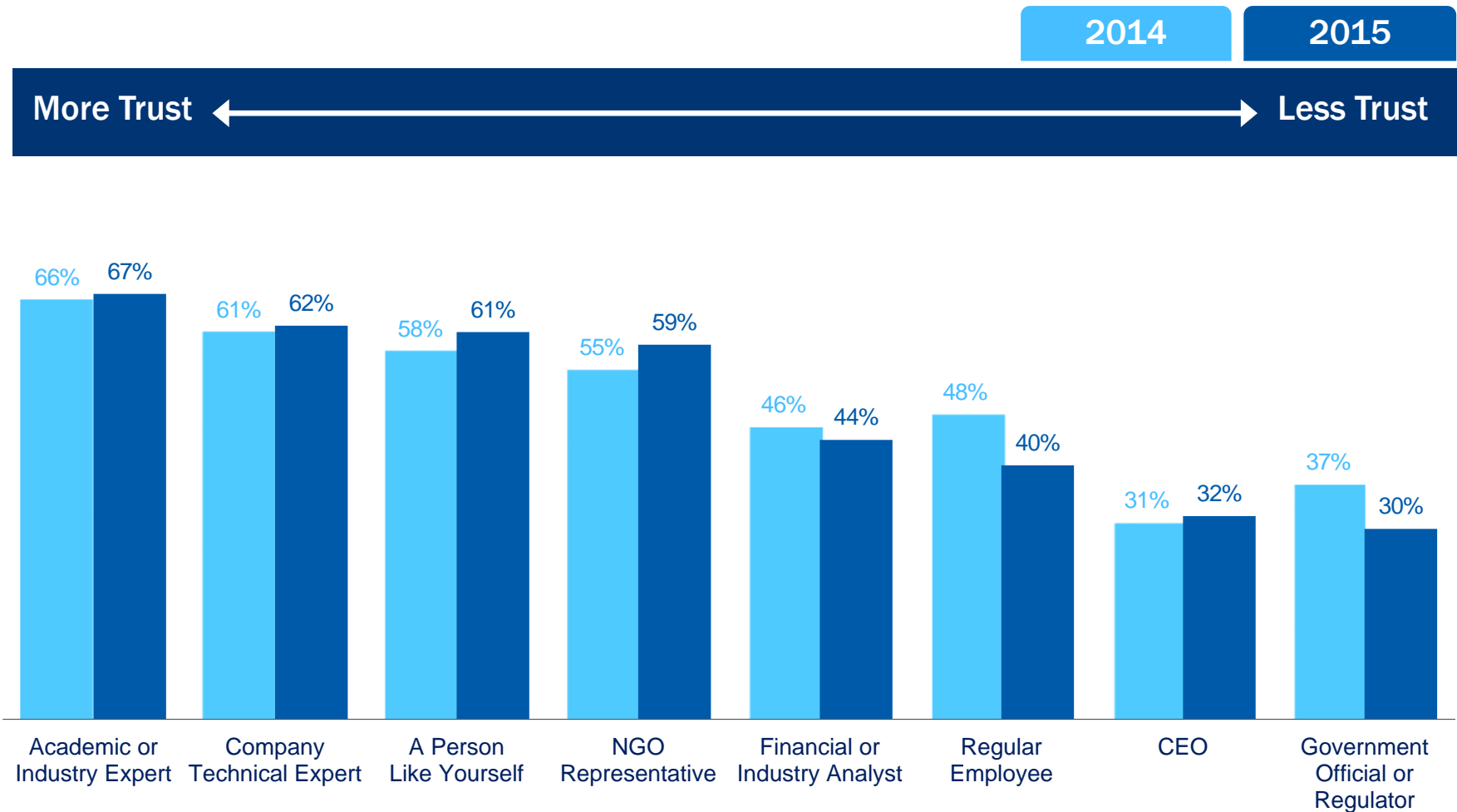


Q130-143. [TRACKING] Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible) Informed Publics, 27-country global total.

# LEADERSHIP: FORTE GAP ANCHE IN ITALIA



CREDIBILITY OF SPOKESPERSONS, 2014 VS. 2015 IN ITALY

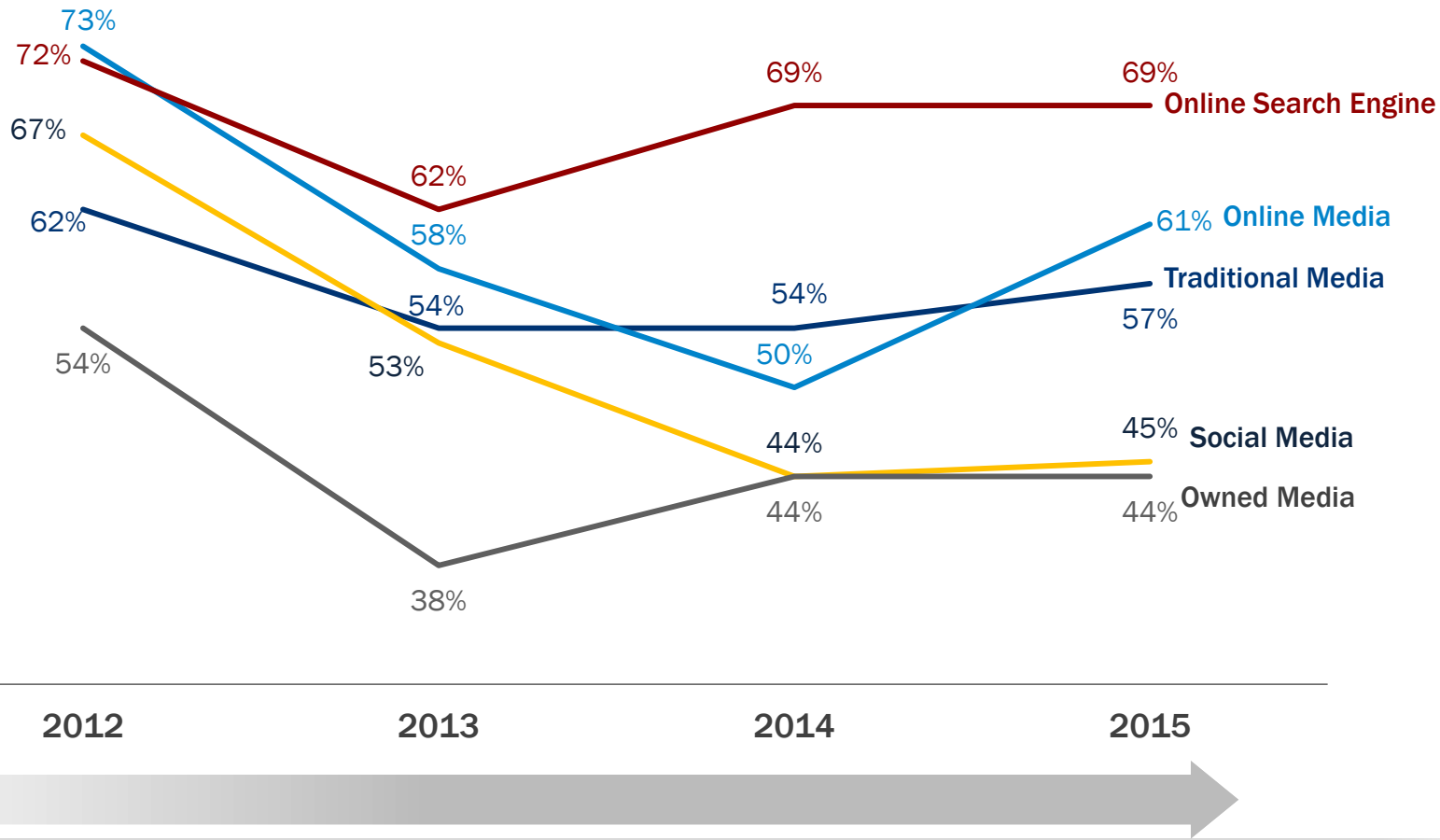


Q130-143. [TRACKING] Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Trust) Informed Publics, in Italy.

# TRUST AND MEDIA

# FONTI MEDIA: MOTORI DI RICERCA BATTONO MEDIA TRADIZIONALI

TRUST IN EACH SOURCE FOR GENERAL NEWS AND INFORMATION IN ITALY



Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale, where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust) Informed Publics, in Italy.

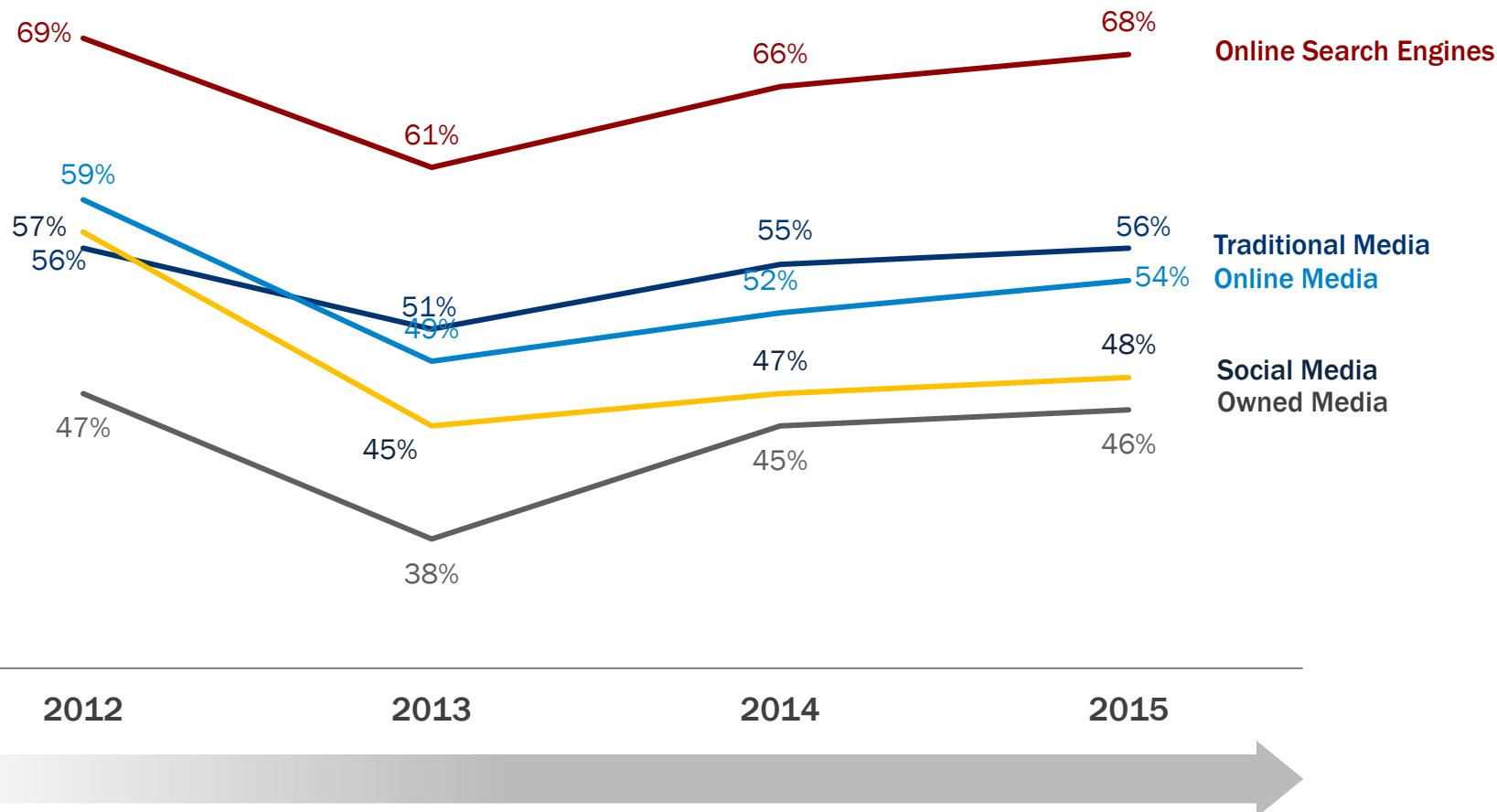


# FONTI MEDIA: STESSO TREND PER L'OPINIONE PUBBLICA

TRUST IN EACH SOURCE FOR GENERAL NEWS AND INFORMATION IN ITALY



General  
Population



Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale, where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust) General Population, in Italy.



# LE FONTI ONLINE PRIMA DI TUTTO

TRUST IN INFORMATION CREATED BY EACH AUTHOR ON SOCIAL NETWORKING SITES, CONTENT SHARING SITES AND ONLINE-ONLY INFORMATION SOURCES IN ITALY



NEWSPAPERS



TELEVISION

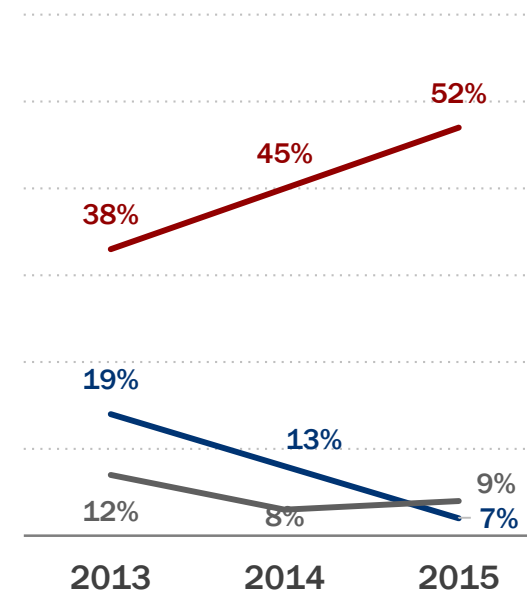
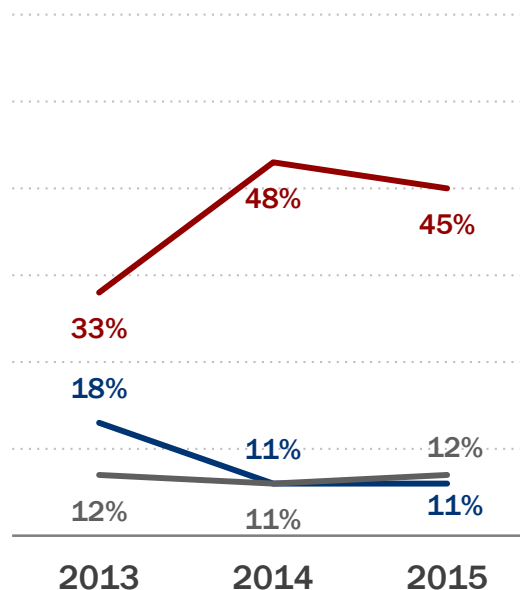
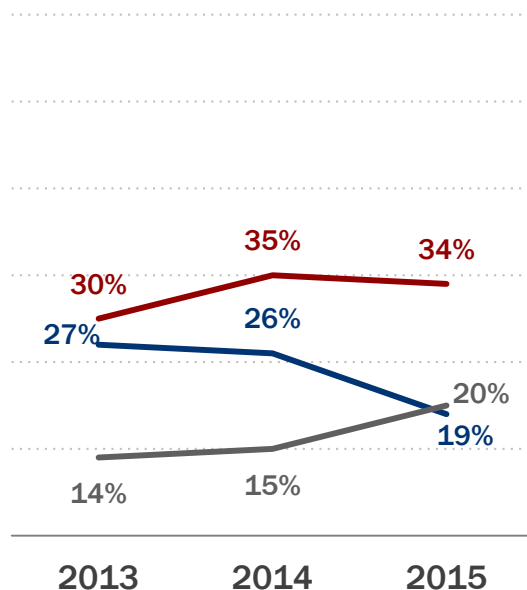


ONLINE SEARCH

The First Source for  
General Information

The First Source for  
Breaking News

Source Used Most to  
Confirm/Validate News



Q183. On a typical day, what is the first source that you go to for general information about business? Informed Publics, Informed Publics, in Italy.

Q184. What is the first source you go to for breaking news about business? Informed Publics, in Italy.

Q185. Which of the following sources do you turn to MOST often to confirm/validate information on breaking news about business? Informed Publics, in Italy.

# STESSO TREND PER L'OPINIONE PUBBLICA



TRUST IN INFORMATION CREATED BY EACH AUTHOR ON SOCIAL NETWORKING SITES, CONTENT SHARING SITES AND ONLINE-ONLY INFORMATION SOURCES IN ITALY



NEWSPAPERS



TELEVISION

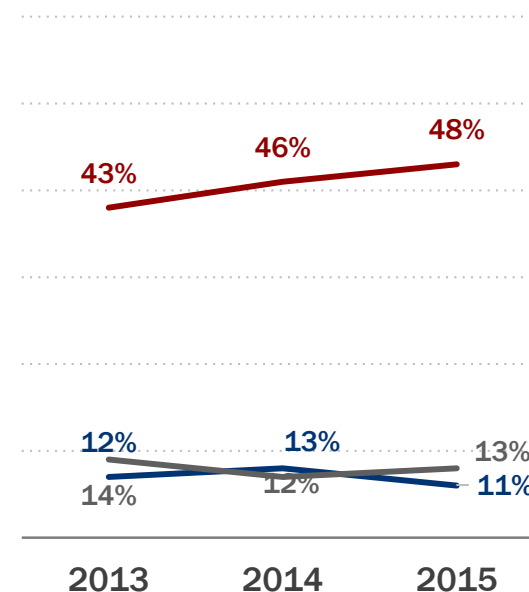
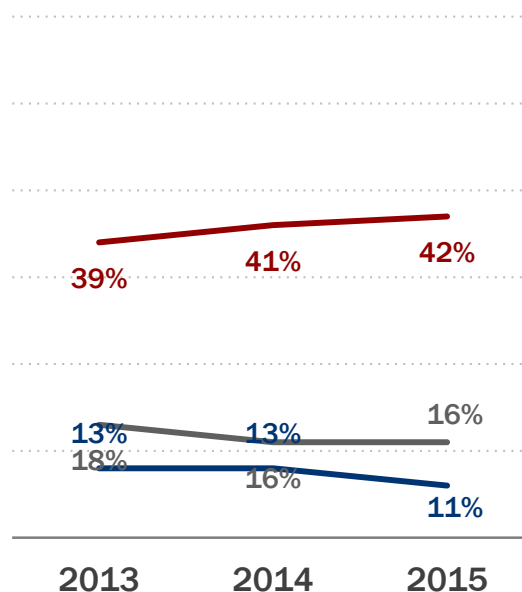
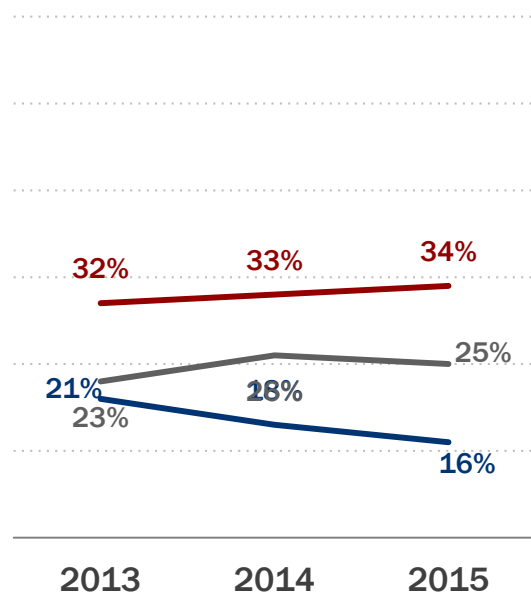


ONLINE SEARCH

The First Source for General Information

The First Source for Breaking News

Source Used Most to Confirm/Validate News



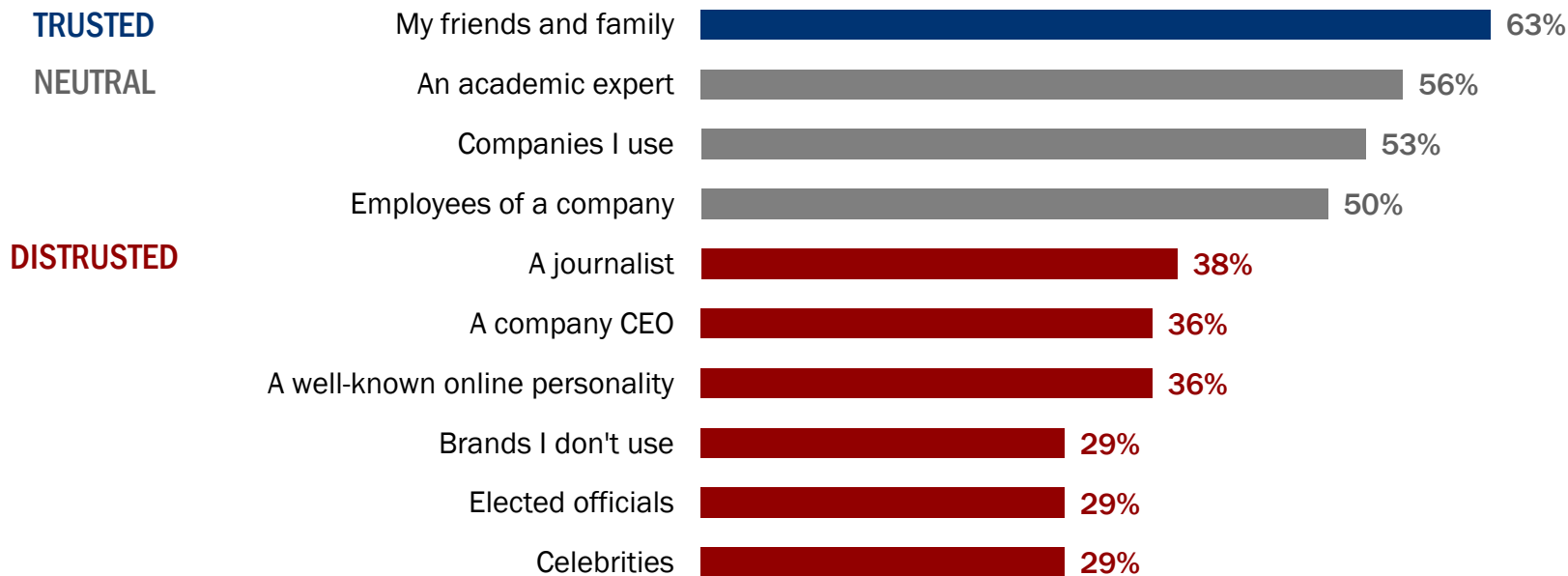
Q183. On a typical day, what is the first source that you go to for general information about business? Informed Publics, General Population, in Italy.

Q184. What is the first source you go to for breaking news about business? General Population, in Italy.

Q185. Which of the following sources do you turn to MOST often to confirm/validate information on breaking news about business? General Population, in Italy.

# CREATORI DI CONTENUTI: FIDUCIA SOPRATTUTTO AGLI AMICI E ALLA FAMIGLIA

TRUST IN INFORMATION CREATED BY EACH AUTHOR ON SOCIAL NETWORKING SITES,  
CONTENT SHARING SITES AND ONLINE-ONLY INFORMATION SOURCES IN ITALY



Q387-396. Thinking about the information you consume on social networking sites, such as Facebook, MySpace, LinkedIn, Meebo, Orkut, Qzone, RenRen, how much do you trust the information posted from each of the following authors or content creators? (Top 4 Box, Trust) Informed Publics, in Italy.

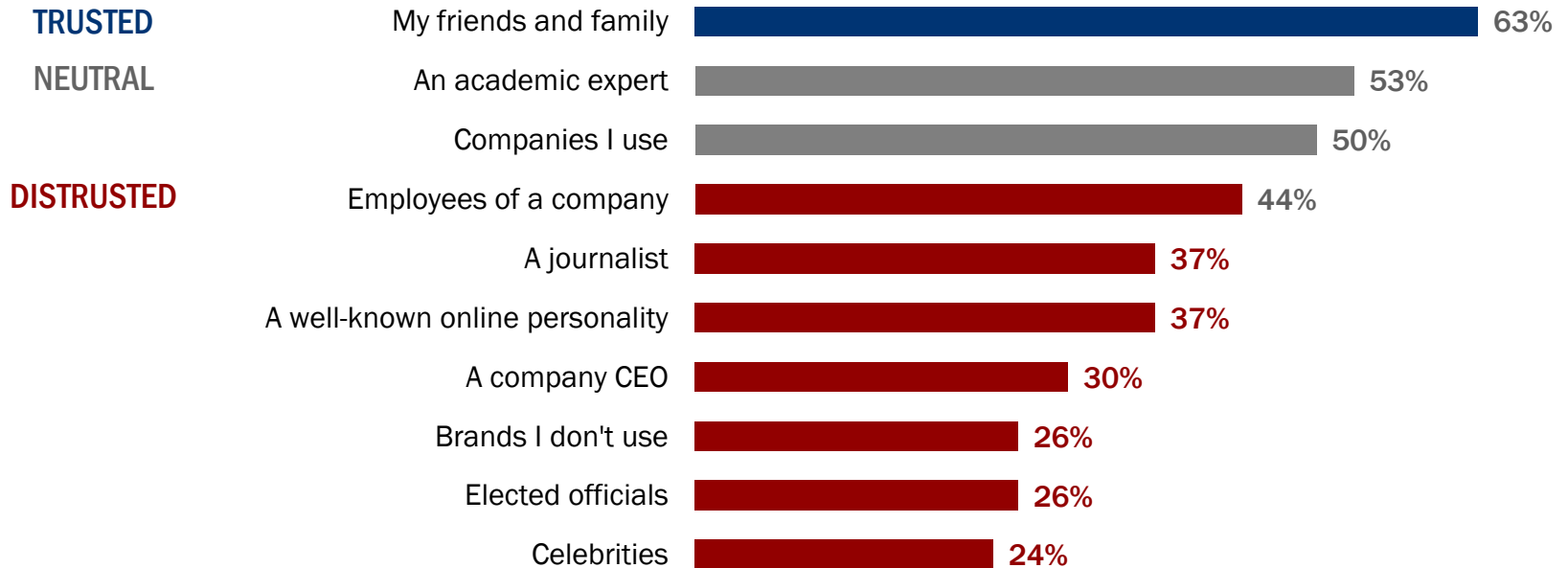
Q397-406. Thinking about the information you consume on content sharing sites, such as YouTube, how much do you trust the information posted from each of the following authors or content creators? Informed Publics, in Italy.

Q407 - 415 Thinking about the information you consume on online-only news and information sources, such as The Huffington Post, BuzzFeed, Techcrunch, etc., how much do you trust the information posted from each of the following authors or content creators? Informed Publics, in Italy.

# SOCIAL MEDIA: STESSO TREND PER PUBBLICO INFORMATO E POPOLAZIONE GENERALE



TRUST IN INFORMATION CREATED BY EACH AUTHOR ON SOCIAL NETWORKING SITES, CONTENT SHARING SITES AND ONLINE-ONLY INFORMATION SOURCES IN ITALY



Q387-396. Thinking about the information you consume on social networking sites, such as Facebook, MySpace, LinkedIn, Meebo, Orkut, Qzone, RenRen, how much do you trust the information posted from each of the following authors or content creators? (Top 4 Box, Trust) General Population, in Italy.

Q397-406. Thinking about the information you consume on content sharing sites, such as YouTube, how much do you trust the information posted from each of the following authors or content creators? General Population, in Italy.

Q407 - 415 Thinking about the information you consume on online-only news and information sources, such as The Huffington Post, BuzzFeed, Techcrunch, etc., how much do you trust the information posted from each of the following authors or content creators? General Population, in Italy.

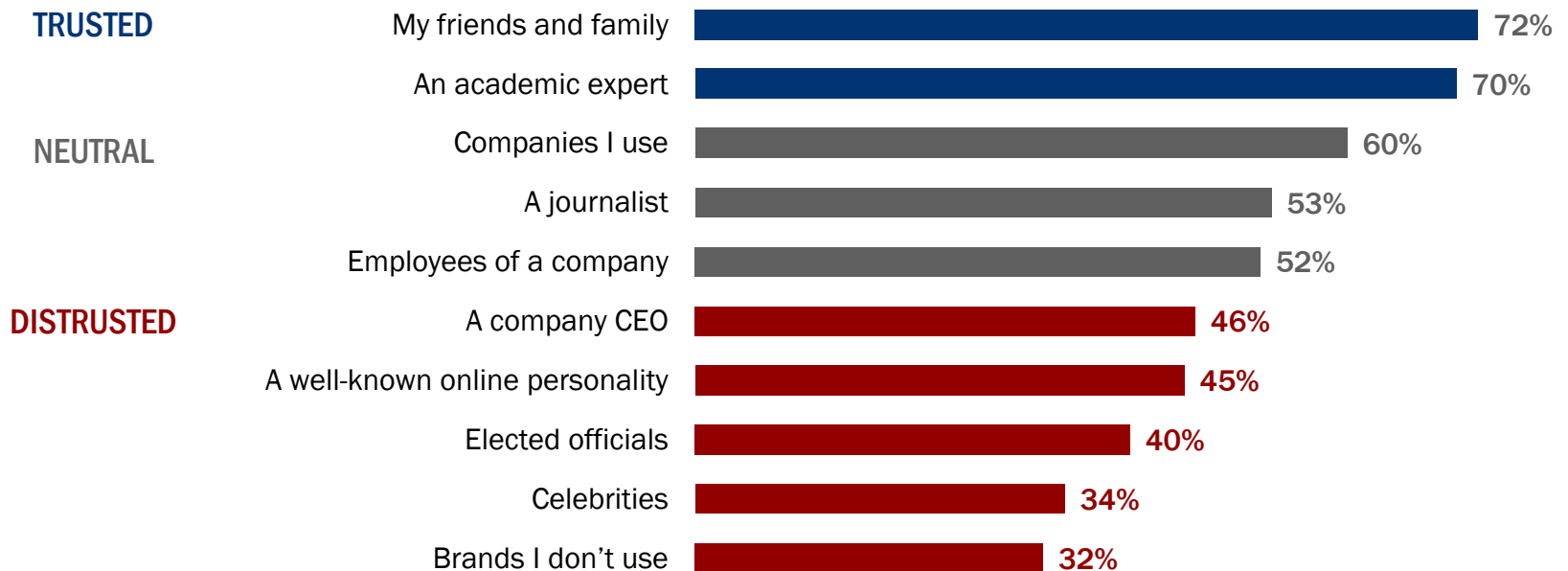
# SOCIAL MEDIA: IN ITALIA COME IN TUTTO IL MONDO



Informed  
Public



## TRUST IN INFORMATION CREATED BY EACH AUTHOR ON SOCIAL NETWORKING SITES, CONTENT SHARING SITES AND ONLINE-ONLY INFORMATION SOURCES



Q387-396. Thinking about the information you consume on social networking sites, such as Facebook, MySpace, LinkedIn, Meebo, Orkut, Qzone, RenRen, how much do you trust the information posted from each of the following authors or content creators? (Top 4 Box, Trust) Informed Publics, 27-country global total. | Q397-406. Thinking about the information you consume on content sharing sites, such as YouTube, how much do you trust the information posted from each of the following authors or content creators? Informed Publics, 27-country global total. | Q407-415. Thinking about the information you consume on online-only news and information sources, such as The Huffington Post, BuzzFeed, Techcrunch, etc., how much do you trust the information posted from each of the following authors or content creators? Informed Publics, 27-country global total.



# TRUST AND INNOVATION IN BUSINESS

# FIDUCIA NELL'INNOVAZIONE: “TROPPO VELOCE” PER LA MAGGIORANZA

THE PACE OF DEVELOPMENT AND CHANGE IN BUSINESS AND INDUSTRY TODAY IS...



28% Too Slow

19% Just Right

51% Too Fast



Q349-351. Below are a number of statements. For each, please think about the pace of development and change in business and industry today and select the response that most accurately represents your opinion. (Not Enough, Too Much) Informed Publics, 27-country global total.



# FIDUCIA NELL'INNOVAZIONE: SORPRESA, PER NOI ITALIANI E' TROPPO LENTA

THE PACE OF DEVELOPMENT AND CHANGE IN BUSINESS AND INDUSTRY IN ITALY TODAY IS ...



**GLOBALLY 51% FEEL THAT INNOVATION IS MOVING TOO FAST. IN ITALY IT IS THE OPPOSITE, 43% FEEL THAT INNOVATION IS MOVING TOO SLOW. WE ARE READY FOR A CHANGE!**



Informed  
Public



# FIDUCIA NELL'INNOVAZIONE

## ACTIONS THAT INCREASE TRUST IN INDUSTRY TO IMPLEMENT TECHNOLOGY CHANGES IN ITALY

Make test results available publicly for review	71%
Partner with an academic institution	68%
Run a clinical trial or beta test	68%
Partner with an NGO	61%
Partner with government	46%

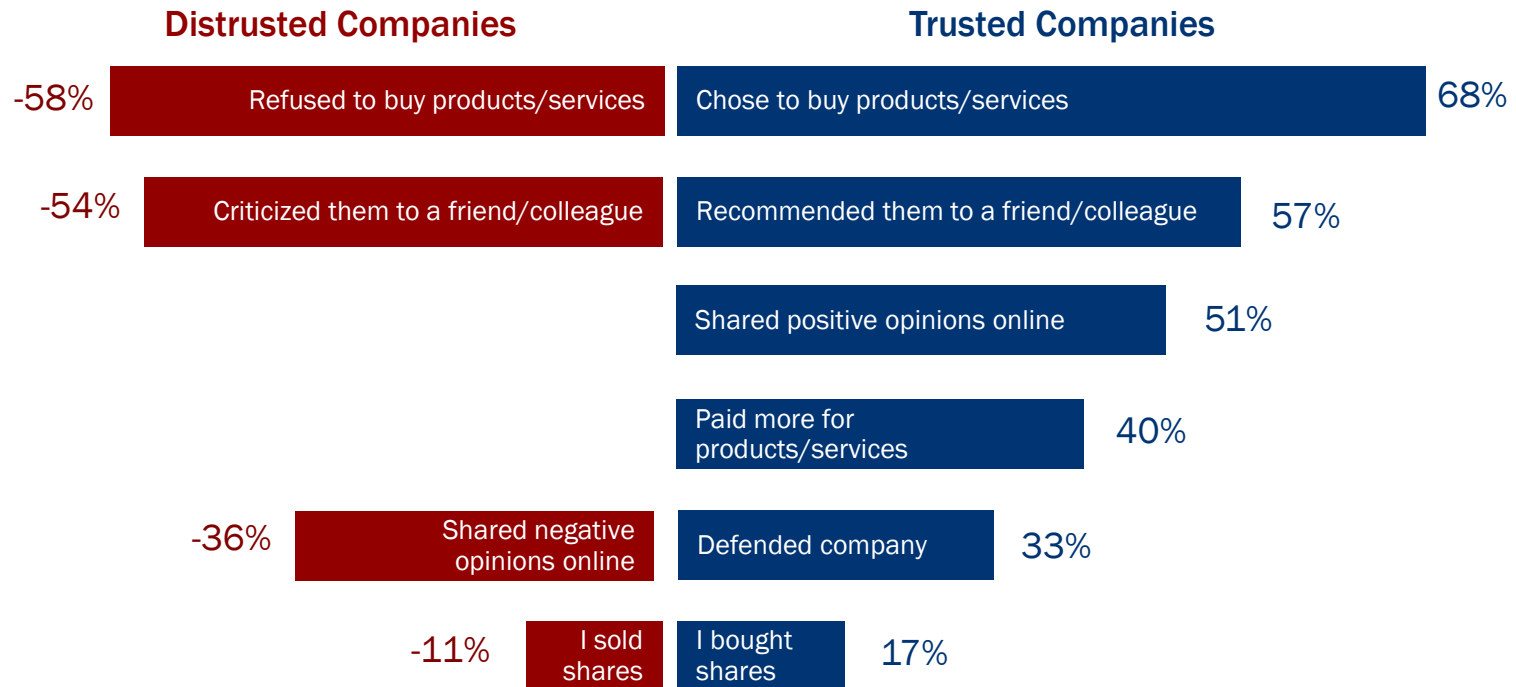
**47% AGREE:**  
*New developments  
are not tested  
enough*

Q365-369. Below is a number of actions that could impact your trust in business and industry to develop and implement technology-led changes such as those you just evaluated. What impact would each of these actions have on your trust? Informed Publics, in Italy.

Q349-351. Below are a number of statements. For each, please think about the pace of development and change in business and industry today, and select the response that most accurately represents your opinion. (Not Enough, Too Much) Informed Publics, in Italy.

# FIDUCIA NELL'INNOVAZIONE: COME CAMBIANO I COMPORTAMENTI

BEHAVIOR BASED ON TRUST IN ITALY



Q371-376. Thinking back over the past 12 months, have you taken any of the following actions in relation to companies that you trust? Please answer yes or no to each action. Informed Publics, Italy.

Q377-380. Still thinking about the past 12 months, have you taken any of the following actions in relation to companies that you do not trust? Please answer yes or no to each action. Informed Publics, Italy.

# COSTRUIRE E DIFENDERE LA FIDUCIA

*“A company can take specific actions that both increase profits and improve the economic and social conditions in the community where it operates.”*

**81%**  
agree

## Reasons Trust in Business Has Increased in ITALY

**49%**

Produces Economic  
Growth/Contributes  
to the Greater Good

**47%**

Allows Me to Be a  
Productive  
Member of Society

**39%**

Helps Me and My  
Family Live a  
Fulfilling Life

## Reasons Trust in Business Has Decreased in ITALY

**47%**

Fails to Contribute  
to the Greater Good

**46%**

Lacks Economic  
Growth

**38%**

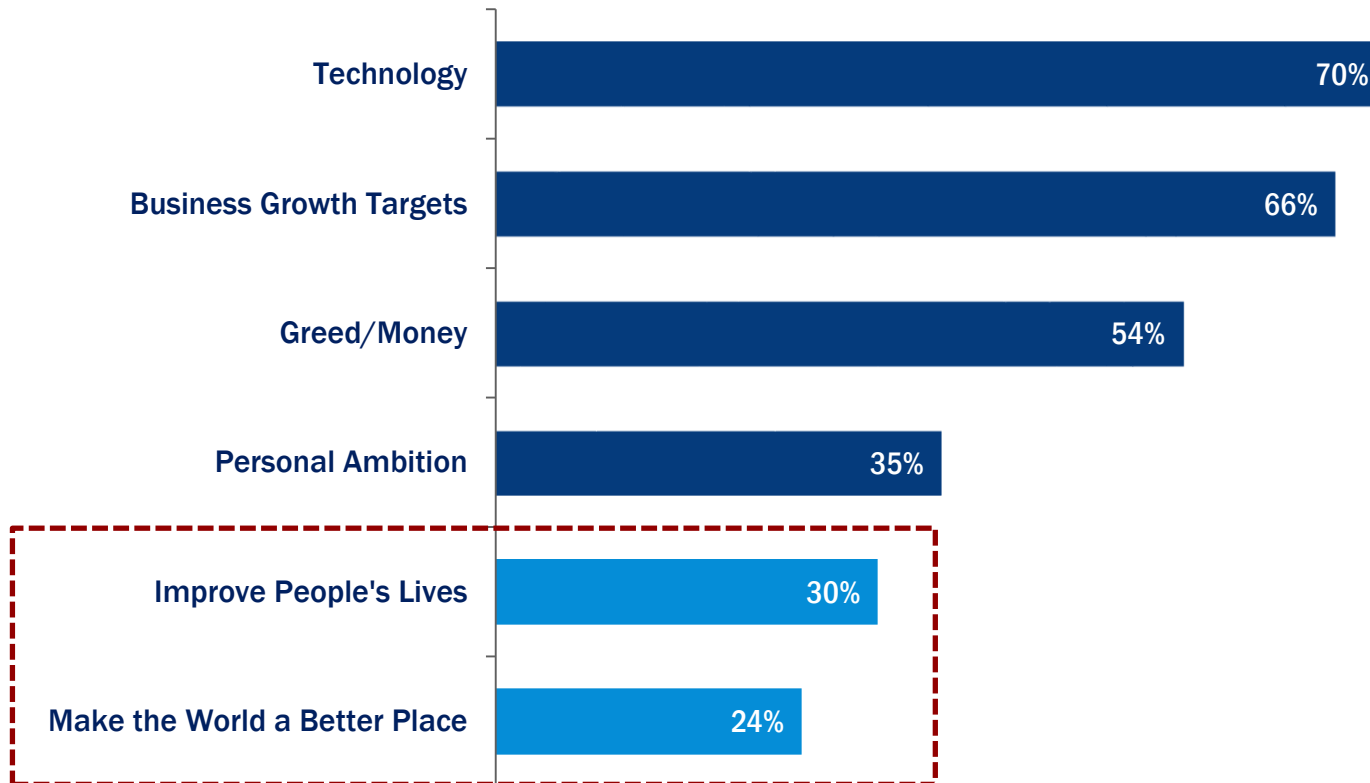
Does Not Allow Me to  
Be a Productive  
Member of Society

Q328-329. For which of the following reasons, if any, has your trust in each institution listed below increased over the past year? (Top 4 Box, Trust) Informed Publics, in Italy. Q330-331. For which of the following reasons, if any, has your trust in each institution listed below decreased over the past year? (Top 4 Box, Trust) Informed Publics, in Italy. Q249-252. Please indicate how much you agree or disagree with the following statements? (Top 4 Box, Trust) Informed Publics, in Italy.

# IL CAMBIAMENTO E' UN FATTO TECNOLOGICO CHE NON RENDE MIGLIORE IL MONDO NÉ LA VITA



DRIVERS OF CHANGE IN BUSINESS AND INDUSTRY TODAY ARE PERCEIVED TO BE:



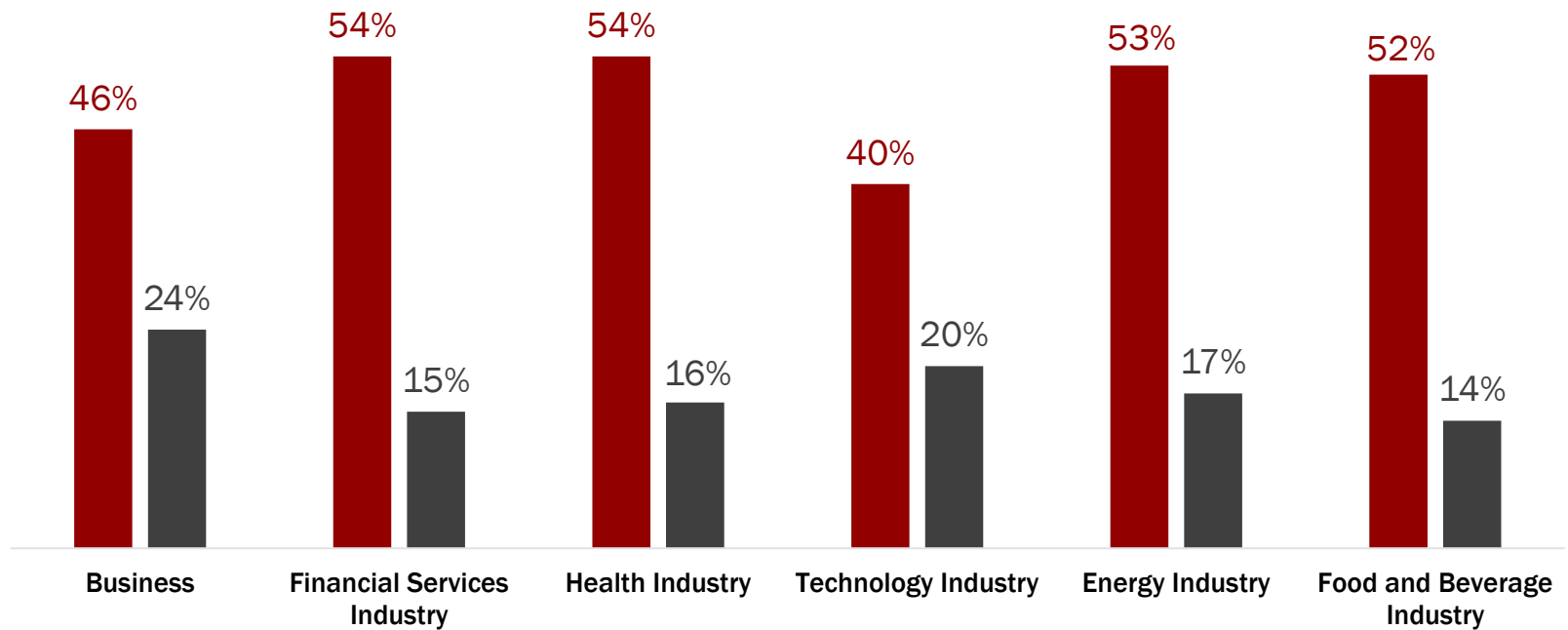
# BUSINESS INNOVATION: NON ABBASTANZA REGOLAMENTATA

GOVERNMENT REGULATION OF BUSINESS AND ACROSS  
INDUSTRY SECTORS IS PERCEIVED TO BE:

2014 TRUST BAROMETER:  
**51%**  
say the most important  
role for government in business is  
to protect consumers and regulate business



↓ NOT ENOUGH REGULATION      ↑ TOO MUCH REGULATION



Q148. [TRACKING] When it comes to government regulation of business, do you think that your government regulates business too much, not enough or the right amount? (Not Enough, Too much) Informed Publics, 27-country global total. Q262/Q263/Q264/Q381/Q382. When it comes to government regulation of the [financial services industry / energy industry / food and beverage industry / health industry / technology industry], do you think that your government regulates it too much, not enough or the right amount? (Not Enough, Too much) Informed Publics, 27-country global total.

