

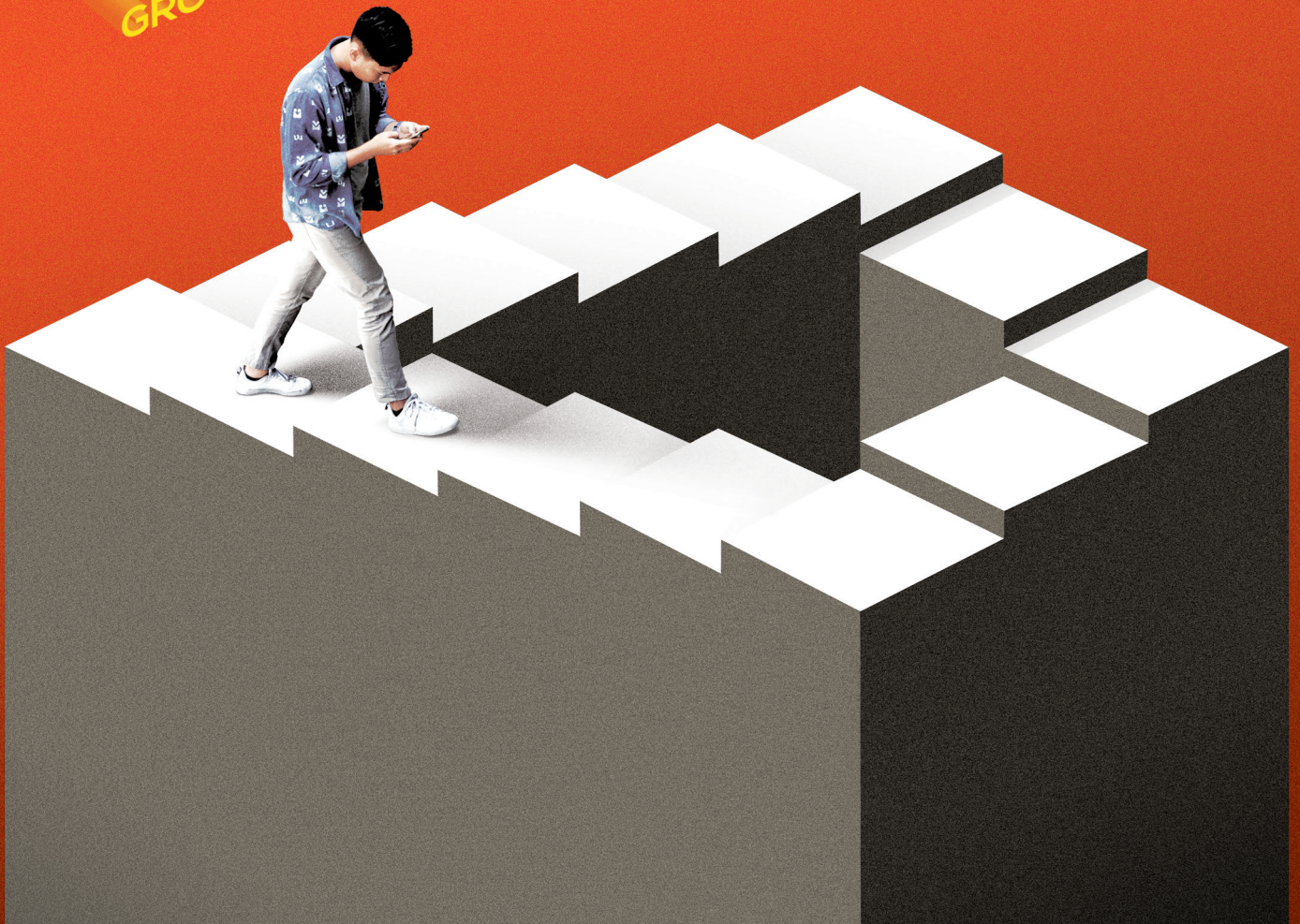


PHILIPPINE  
TRUST INDEX

EXECUTIVE  
SUMMARY

# THE PHILIPPINE PARADOX

GROWING TRUST IN A TIME OF GROWING UNCERTAINTY





## About PTI

The **Philippine Trust Index (PTI)** is the EON Group's multi-awarded proprietary research that looks into the levels and drivers of trust among Filipinos. It is a nationwide survey that cuts across socioeconomic, educational, geographic and demographic backgrounds to discover just how much Filipinos trust the six key institutions in society - the Government, the Business Sector, the Media, Non-Governmental Organizations, the Church and the Academe.

For the fifth iteration of the PTI, EON collected responses from 1,200 Filipinos aged 18 and above from March to April 2017. These Filipinos represent the sentiments of the general public. Among this larger pool is a sample of 600 Filipinos deemed the informed public - Filipinos who are at least 25 years old with at least 3 years of tertiary education and who tune in to news updates at least twice a week.

As EON has always endeavored to go the extra mile to remain timely and relevant, the PTI goes beyond trust levels to look deeper into pressing issues important to Filipinos. This year, EON turned social media into a pillar of the study by exploring Filipinos' trust in social media compared to other institutions, and by listening in on social media conversations about trust in the six key institutions to discover whether online discussions truly reflect on-the-ground realities.

This initiative is driven by EON's commitment to championing truth-telling for meaningful and lasting change. The PTI is born out of the belief that telling the truth well can only be done by understanding trust in the Filipino society.

For a more in-depth look at the discoveries of the **Philippine Trust Index 2017**, a digital copy of the Primer is available upon request. Please email [researchandanalytics@eon.com.ph](mailto:researchandanalytics@eon.com.ph)

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# THE PHILIPPINE PARADOX

All over the world, we are seeing rises that rapidly change the way society functions.

**We are seeing a rise in uncertainty.**

From unconventional and unpredictable leaders of nations, monumental events in international relations and an apparent return to protectionism, to the growing threat of terrorism to both security and the economy - all these new players plus the constantly evolving rules of the game have made it all the more difficult to navigate the local and global arenas.

**We are seeing a rise in social media's ubiquity and its power to influence real-world outcomes.**

The Internet penetration rate and social media access around the world (including the Philippines) are on the rise, but still only make up less than half of the global population. Still, political and market outcomes in the last years would suggest that online conversations are representative of public sentiment, or at the very least they spur concrete actions - from rallies to boycotts to high-profile resignations.

**We are seeing a rise in demands placed on institutions to do well and to do good.**

Social media has given us a platform to air our grievances, and the result is that now more than ever, for better or for worse, fairly or unfairly, we have become a more demanding society, most especially of institutions. With social media acting as both our megaphone to the public and our direct line to institutions, we make sure that institutions know not only our demands, but also that we are constantly watching and scrutinizing their every move.

The result of these rises is a society that is constantly uncertain of institutions' motives, of political and market outcomes, and of the truth. And when uncertainty rises, trust falls.

**The world is experiencing a crisis of trust!**

Across the globe, trust in society's four key institutions - the government, the business sector, NGOs and the media - have all dropped like never before.

**In the Philippines, trust is on the rise.  
This is the Philippine Paradox.**

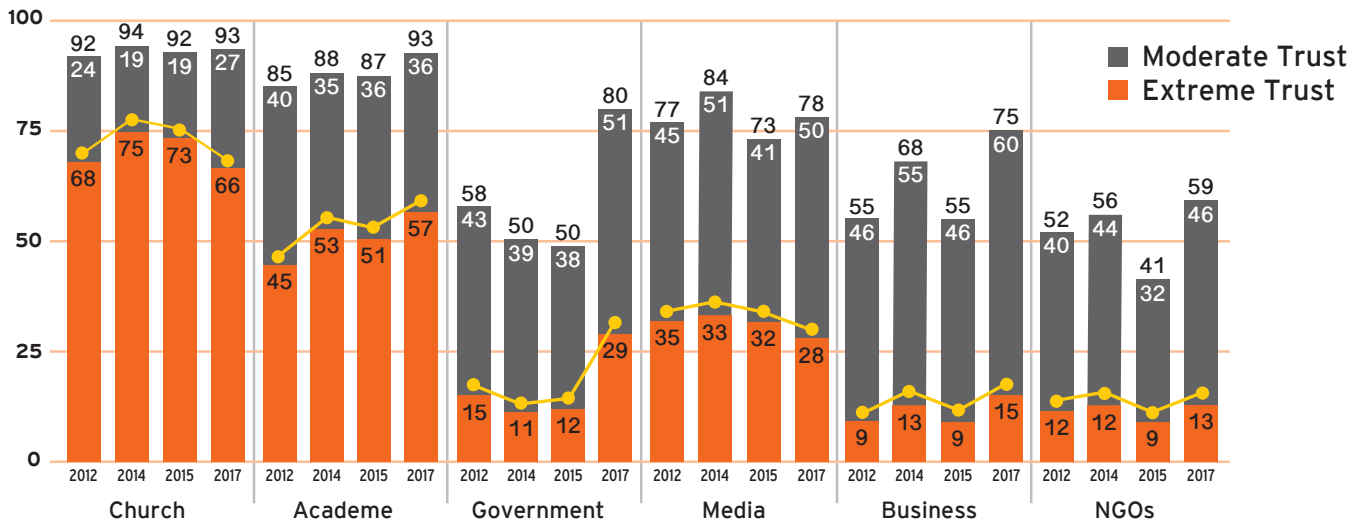


## PART I: WHERE DO FILIPINOS PLACE THEIR TRUST?

This year marks a time of many firsts for the Philippine Trust Index (PTI). Four out of society's six institutions gained the trust and favor of the Filipino people, while trust in two, the Church and the Media, stagnated this 2017. The greatest gainer of Filipinos' favor is the government as extreme trust almost tripled since 2015 while overall trust levels are up by 30 percentage points (pp). This sharp incline puts trust in the government at par with trust in the media - a first in PTI history.

While the Church, regardless of religion, remains to be the most trusted by Filipinos, trust in this institution continues to decline - a trend going on since 2014 - while overall trust has stagnated. This plateau is matched by the growing overall trust in the Academe, which means that for the first time in PTI history, Filipinos' overall trust in the Church and the Academe are at the same level.

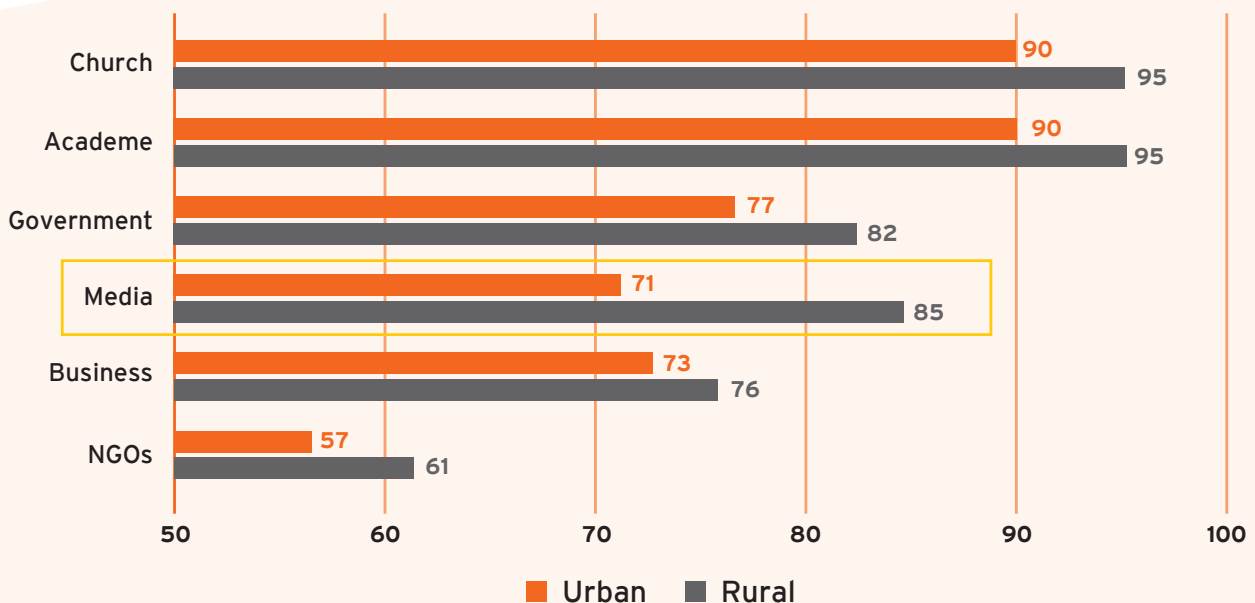
Trust in Institutions over Time



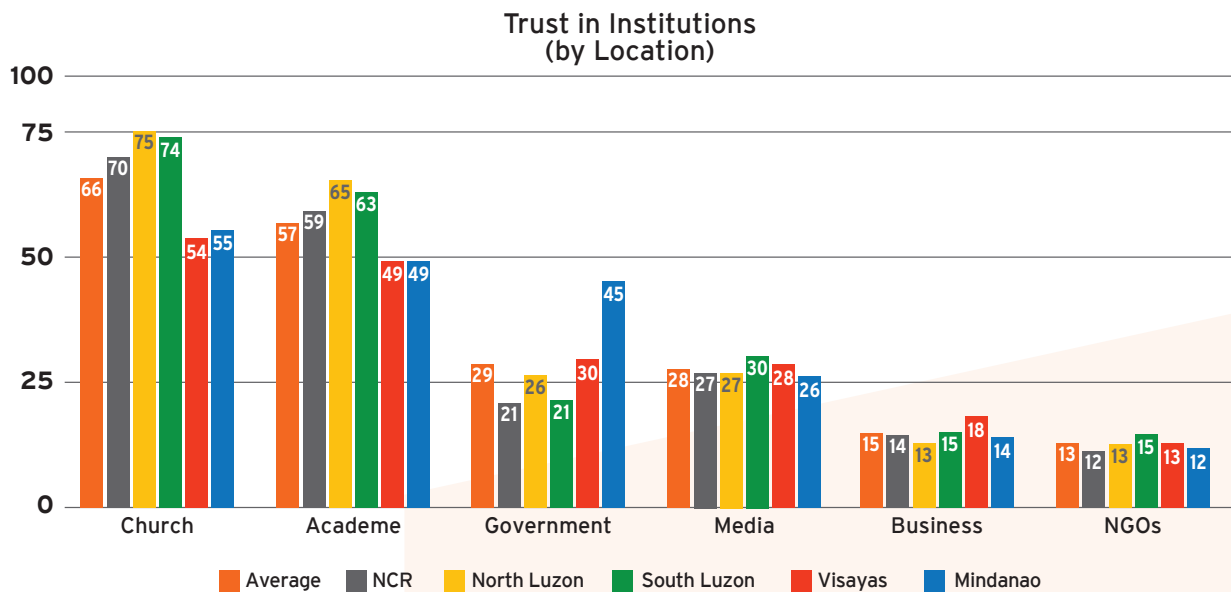
### LOOKING DEEPER: WHAT FACTORS AFFECT FILIPINOS' TRUST?

1. Rural residents are a more trusting people than urban dwellers. Trust in all institutions are generally higher among rural residents versus their urban counterparts, but the difference is most stark (14pp) for people's trust in media.

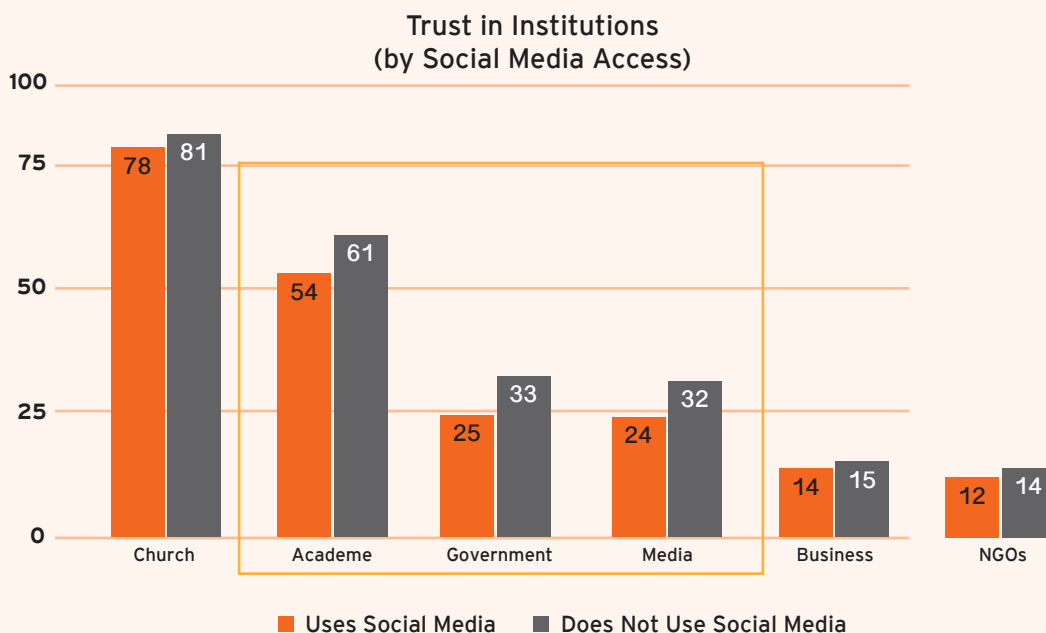
Trust in Institutions (by Area)



2. Trust levels across institutions and sub-institutions vary significantly among Luzon, Visayas and Mindanao. The three island groups are most divided about their trust in the Church, Academe and Government. Luzonians trust the Church and Academe far more than Visayans and Mindanaoans, but the Government is significantly more trusted by Mindanaoans.

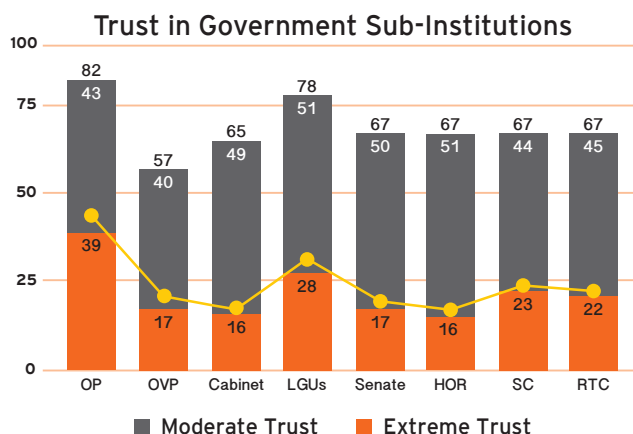


3. Institutions are trusted less by Filipinos on social media than by Filipinos offline. The gaps are most significant for the government (8pp), the media (8pp), and the academe. It's also worth noting that rural residents are less likely to have social media access (36.4%) than urban dwellers (63.6%).

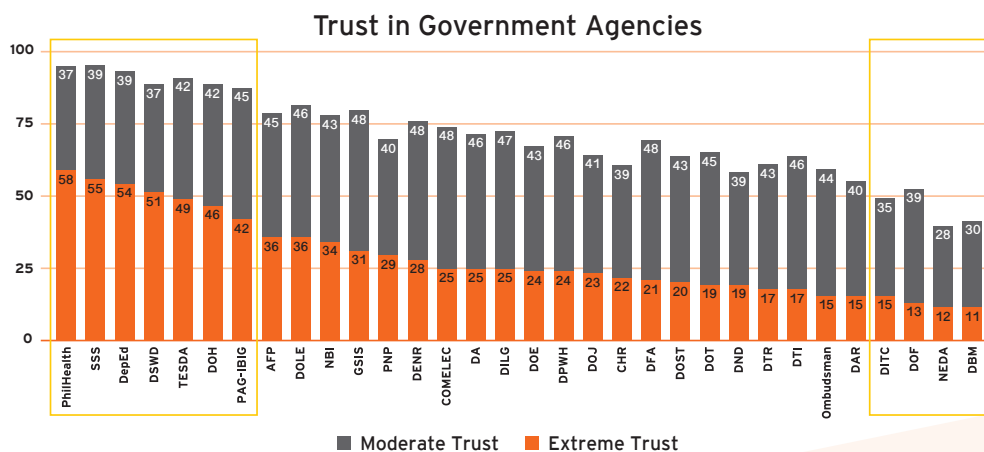


## THE PTI 2017 WILDCARD: TRUST IN THE GOVERNMENT

Filipinos trust most government sub-institutions more now than ever before. The Office of the President experienced an unprecedented jump in extreme trust (24pp) and overall trust (31pp) levels. This makes OP this year's most trusted government sub-institution, surpassing LGUs despite the gains of the latter, while the Office of the Vice President has the lowest trust ratings in 2017.



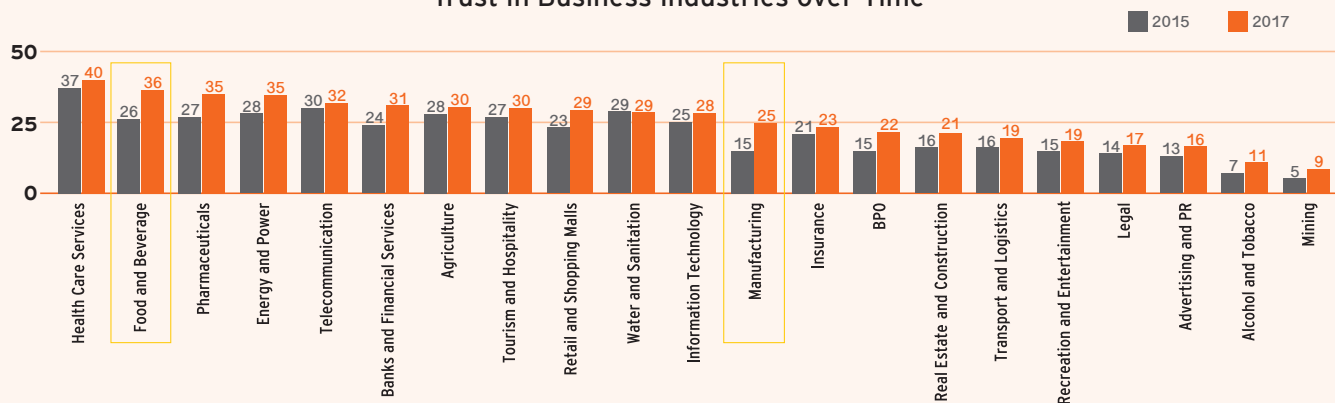
Filipinos are most likely to trust government agencies with which they always interact, evident in the fact that Filipinos' most trusted government agencies provide social services while the least trusted are those with which the everyday Filipino would rarely interact. PhilHealth, SSS and DepEd are at the top of the list with at least 93% of Filipinos putting their trust in these agencies, while NEDA, DBM and DOF have the most number of Filipinos unfamiliar with these agencies, and unsurprisingly, the least number of Filipinos claiming to trust in them.



## CREEPING GROWTH: TRUST IN THE BUSINESS SECTOR

Extreme trust in business industries are on the rise this 2017. Almost all businesses are now more trusted by Filipinos compared to two years ago. The Manufacturing and Food & Beverages (F&B) Industries gained the most trust in the past two years (10pp jump each), while the Water and Sanitation industry is the sole stagnant industry. Among the general public, healthcare maintains its position as the most trusted industry, but for this year, the F&B and pharmaceutical industries flank healthcare as each jumped 8 ranks and 1 rank respectively in the last two years. On the other side, Filipinos trust least the Mining, Alcohol and Tobacco, Advertising and PR, and Legal industries, all of which hold their positions as the least trusted industries. While they certainly are a far cry from being trusted by Filipinos, trust in these industries nonetheless improved by 3-4pp since 2015.

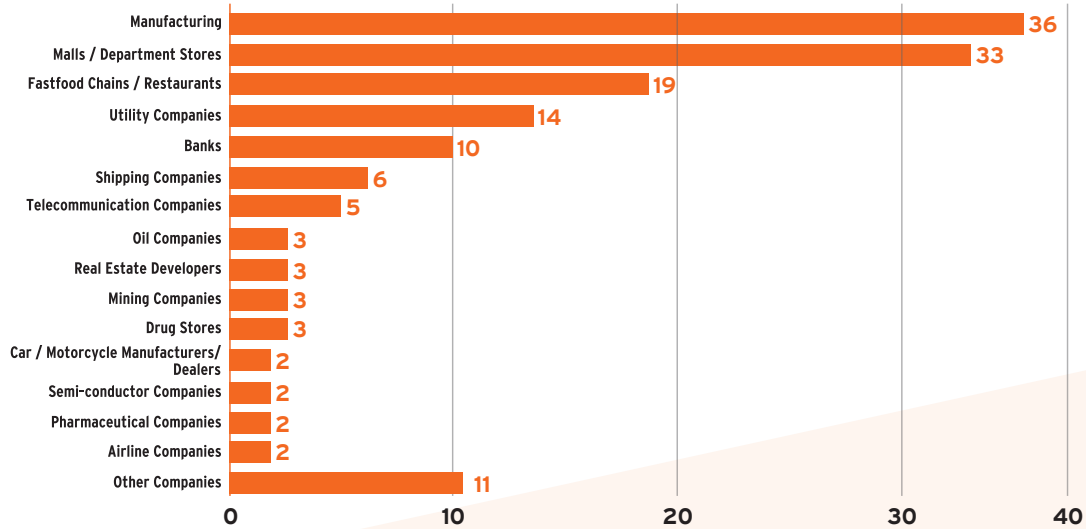
Trust in Business Industries over Time



That this roster of most trusted industries all include brands that Filipinos use or come in contact with regularly suggests that repeated interactions is what builds trust.

Filipinos trust brands that they come in contact with most often, whether as employees or as customers. Tallying together the Filipinos' most trusted brand names, most fall under the manufacturing and retail sectors, followed by restaurants and fastfood chains.

Most Trusted Brands by Sector



Trust versus Fame:

Which brands are the most popular and which are the most trusted among Filipinos?

The Most Popular & The Most Trusted

GENERAL PUBLIC

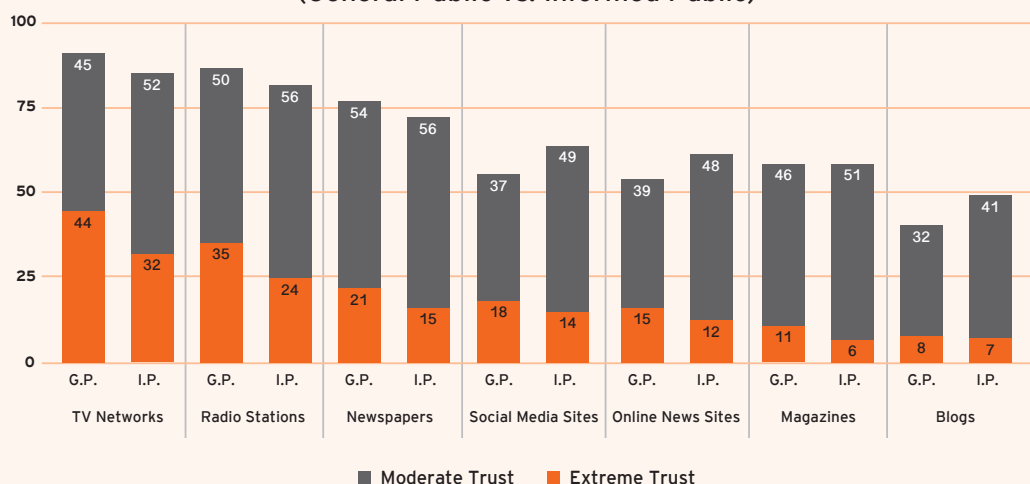
INFORMED PUBLIC

| GENERAL PUBLIC     |                    | INFORMED PUBLIC  |                  |
|--------------------|--------------------|------------------|------------------|
| MOST POPULAR       | MOST TRUSTED       | MOST POPULAR     | MOST TRUSTED     |
| SM                 | SM                 | SM               | SM               |
| Jollibee           | San Miguel Corp.   | San Miguel Corp. | San Miguel Corp. |
| San Miguel Corp.   | Jollibee           | Jollibee         | Jollibee         |
| Coca-Cola          | Coca-Cola          | Coca-Cola        | Coca-Cola        |
| McDonald's         | McDonald's         | Metro Gaisano    | Aboitiz          |
| Robinsons          | BDO                | Mitsumi          | Mitsumi          |
| BDO                | Robinsons          | Aboitiz          | Metro Gaisano    |
| Nestle Philippines | Aboitiz            | McDonald's       | BDO              |
| Meralco            | Nestle Philippines | PLDT             | McDonald's       |
| PLDT               | Meralco            | Robinsons        | PLDT             |

A PARADIGM SHIFT IN COMMUNICATIONS: TRUST IN MEDIA AND SOCIAL MEDIA

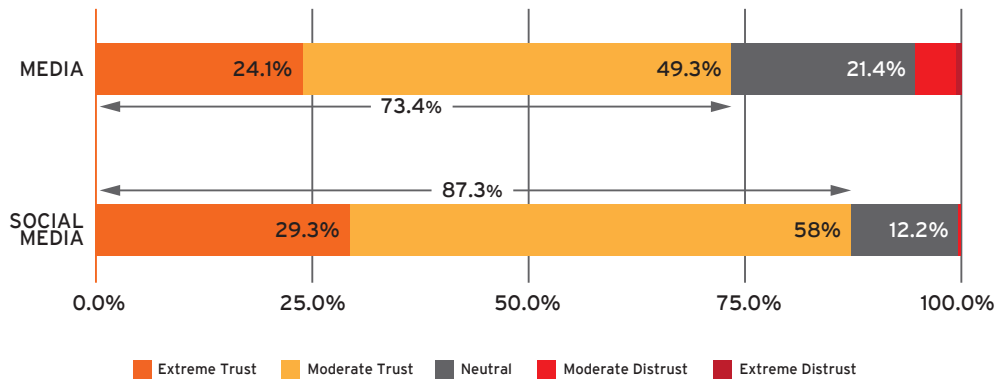
Television networks, radio stations, and newspapers - the triad of traditional media - remain to be the most trusted media channels among Filipinos, far surpassing the overall level of trust in social media sites. The general public trusts (both extreme and overall trust) most media channels more than their informed counterparts, with the sole exception of social media sites; while extreme trust in social media sites is slightly higher among the general public, overall trust in social media sites is significantly higher (10pp) among informed Filipinos.

Trust in Media Channels (General Public vs. Informed Public)



What is interesting to note is that while only 49% of Filipinos have access to social media, those who are online trust in social media more than they trust media as an institution, the latter being primarily associated with traditional media. There are also more people who flat out distrust the media than social media.

Trust and Distrust in Media and Social Media among Social Media Users



### The Philippines' Top Communicators: Who are Filipinos' most trusted media personalities?

| General Public      | Informed Public     |
|---------------------|---------------------|
| Jessica Soho        | Raffy Tulfo         |
| Vikki Morales       | Jessica Soho        |
| Mike Enriquez       | Mel Tiangco         |
| Mel Tiangco         | Mike Enriquez       |
| Noli de Castro      | Bernadette Sembrano |
| Bernadette Sembrano | Noli de Castro      |
| Ted Failon          | Ted Failon          |
| Karen Davila        | Julius Babao        |
| Julius Babao        | Karen Davila        |
| Korina Sanchez      | Korina Sanchez      |

Among those who do trust social media, organic and personal posts by friends and family are the most trusted social media content, while social media influencers' content and strangers' posts shared by their network are the least trusted

## PART II: WHAT DRIVES FILIPINOS TO TRUST?

### FILIPINOS WILL TRUST THE GOVERNMENT THAT IMPROVES THEIR EVERYDAY LIVES IN CONCRETE WAYS.

Filipinos' priorities remain unchanged since 2015, but people are far more satisfied with the government's performance today. Filipinos still value the government's ability to ensure peace and security and to help the poor as the foremost drivers of trust in institutions. People also consider providing better job opportunities and putting corrupt politicians in jail as major drivers of trust. Taken together, this shows that Filipinos' trust in the government is hinged on the institution's ability to improve their everyday lives in concrete ways.

What has changed in the last two years is how satisfied Filipinos are with the government's performance vis-a-vis these trust drivers. Filipinos are most satisfied with how the government has been putting corrupt politicians in jail (47%), preparing communities for disasters and calamities (46%) and ensuring national security (43%). The most radical increases are seen in the people's satisfaction with the government's economic prowess, particularly its ability to improve the Philippine economy (18pp) and to support industry development (17pp).

Government Performance Ratings vis-a-vis Trust Drivers



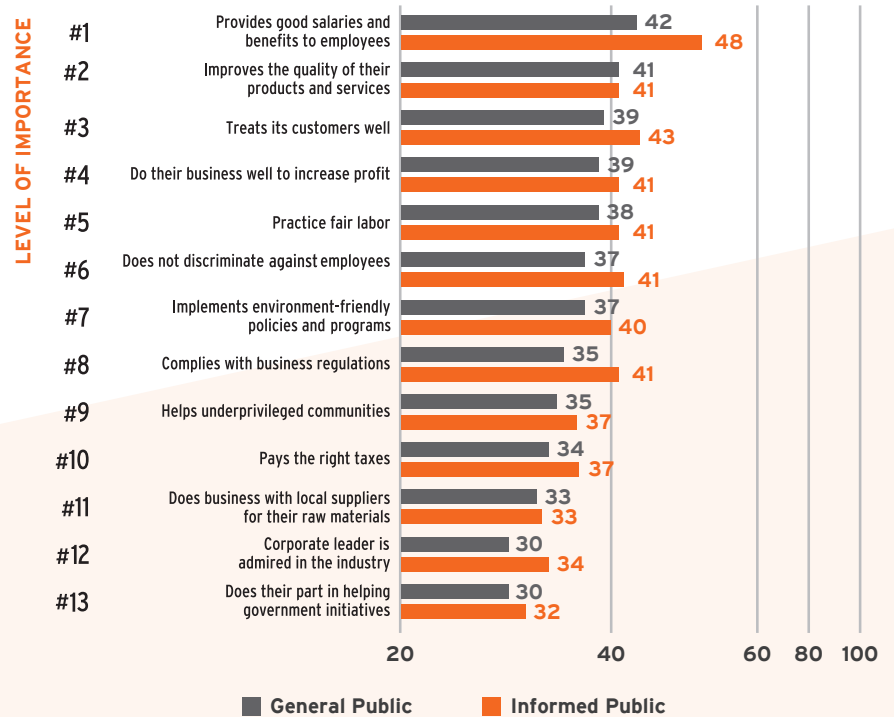


## FILIPINOS ARE MOST ATTENTIVE TO HOW BUSINESSES TREAT REGULAR PEOPLE, ESPECIALLY THEIR EMPLOYEES.

For Filipinos, how businesses treat their employees is the primary determinant of trust and distrust in the institution. Three of the five most important drivers of trust are tied to employee welfare, like providing good salaries and benefits and cultivating a fair and non-discriminatory workplace, while the other two are hinged on good customer service. This goes to show that more than corporate policies or leadership, people are more concerned about how businesses treat regular people - employees and customers alike.

These trust drivers have consistently been the most important to Filipinos, but this year, more Filipinos believe that the business sector is faring far better today compared to two years ago. The general public rated the business sector's performance against trust drivers an average of 14pp higher than they did in 2015. Filipinos are most satisfied with the business sector's performance in the five most important indicators as well as against the trust driver "does business well to increase profit", but the institution's performance ratings improved the most for how businesses treat their employees - i.e., providing good salaries and benefits (15pp) and practicing fair labor practices (14pp), including non-discrimination (14pp) - as well as for how the company treats the environment (14pp) and local suppliers (15pp).

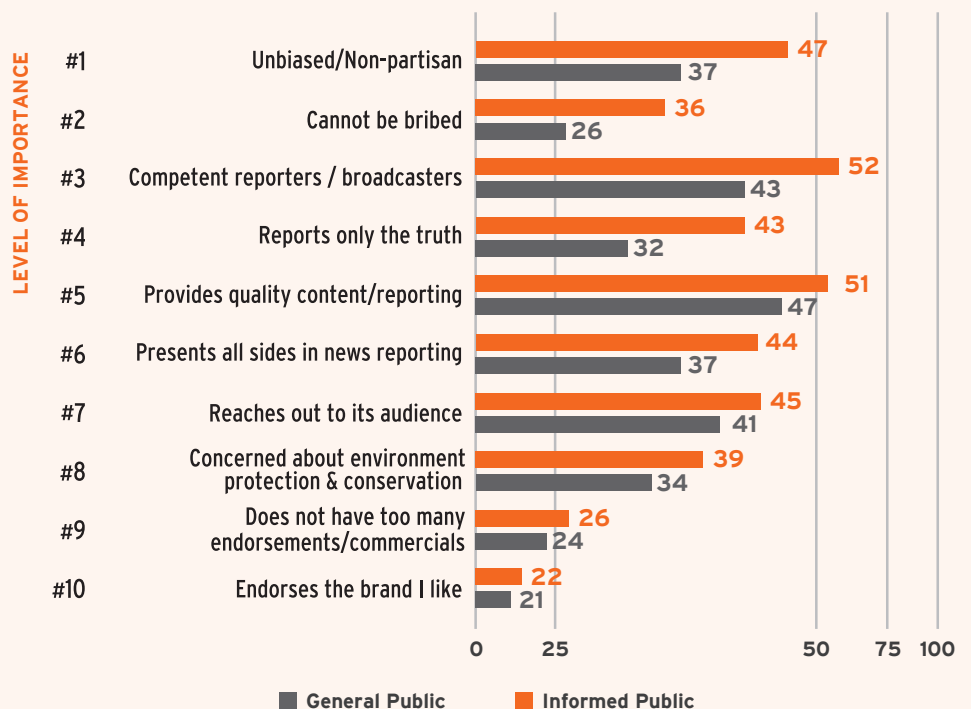
Business Sector Performance Ratings vis-a-vis Trust Drivers



## FILIPINOS' TRUST IN THE MEDIA IS HINGED ON THE INSTITUTION'S PERCEIVED INTEGRITY, OBJECTIVITY, AND COMPETENCE.

It comes as no surprise that the drivers of trust in the media that are most valued by Filipinos focus on their integrity as professionals, and competence and objectivity as reporters of facts. While the informed public rates the media's performance vis-a-vis these trust drivers significantly lower than the general public, Filipinos are unanimously most satisfied with the media's competence and objectivity when reporting facts, and unanimously least satisfied with the media's integrity.

Media Performance Ratings vis-a-vis Trust Drivers



## TRUST DRIVERS IN THE CHURCH, ACADEME AND NGOS

### WHAT DRIVES TRUST IN THE CHURCH?

1. Effectiveness in teaching the religion
2. Sound counsel of religious leaders
3. Outreach programs

### WHAT DRIVES TRUST IN NGOS?

1. Freedom from corruption
2. Effectiveness in helping those in real need
3. Freedom from political interests

### WHAT DRIVES TRUST IN THE ACADEME?

1. Effectiveness in providing quality education
2. Capability to teach good moral values
3. Ability to provide free education

Visayans are least satisfied with the media's integrity, objectivity and competence compared to all other regions in the Philippines. Visayans rated the media an average of 12pp lower than the national mean across all trust drivers, but the biggest gap was seen against the media's concern about environmental issues (22pp), as well as the media's ability to provide quality content (17pp) and present all concerned sides in the news (17pp).

## PART III: WHAT DOES THIS MEAN FOR TRUTH-TELLING?

### KEY INSIGHTS FROM THE PHILIPPINE TRUST INDEX

1. **Trust is built through repeated interactions.** People can only truly trust what they know and understand. Whether it be the government or the business sector, the most trusted institutions and sub-institutions are those that Filipinos come in contact with the most. Frequent and meaningful engagement with stakeholders is thus an imperative in cultivating trust in a brand. Using multiple channels to tell a brand's story is important in first generating awareness and eventually building trust-based relationships.
2. **Organizations must communicate tangible, relatable truths.** While news of great corporate policies or macroeconomic success can improve an institution's reputation among certain people, what the public at large care about most is how institutions can affect their daily lives in concrete ways. Stories that communicate how organizations can benefit the lives of regular Filipinos are more effective in building trust among the public.
3. **Social media has changed the way people deal with and trust in institutions.** While traditional media is still important in building credibility and reaching a wider audience, seeing that Filipinos on social media trust it more than media as an institution, it is critical that organizations also invest in digital communications. Social media has democratized information dissemination, but the risk is likewise great that people would use social media in irresponsible or even malicious ways. This is why organizations should capitalize on social media to establish their own social media assets as official sources of information, thus taking control of the conversations surrounding their brand.
4. **Filipinos generally trust institutions more today, which suggests that leaders of these key institutions are more influential now than in the last few years.** However, this rising trust in institutions is juxtaposed with an apparent lack of social trust among Filipinos. In fact, social media conversations in the Philippines suggest that Filipinos consider others who do not share their views and opinions with extreme distrust. This is worrying because social trust has been linked to social cohesion, improved safety and security<sup>1</sup>, and more stable and democratic societies<sup>2</sup>. To develop our society, it is thus crucial that leaders in society harness their influence and take advantage of the momentum of growing trust to cultivate trust among Filipinos, not just in institutions but in each other.

1 - Of Risk, Uncertainty, Safety, and Trust: (Re)Locating Human Insecurities by Victor King (2016)

2 - System of Trust as a Basis for a Safe and Secure Society by Kiyoshi Abe, et al (2010)

# ON-THE-NET VS. ON-THE-GROUND:

## DOES SOCIAL MEDIA BUZZ REFLECT PUBLIC SENTIMENTS?

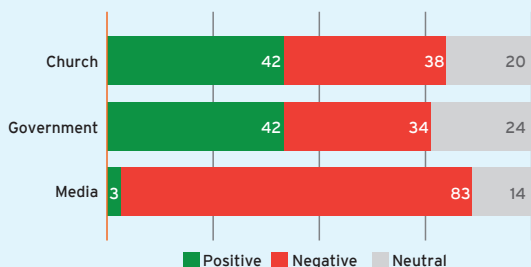
While only about half of Filipinos are online and active on social media, recent events have proven that whatever is trending on social media can impact the country in very tangible ways. Using Groundswell™, EON's proprietary and award-winning social media listening tool, we tuned in on online conversations from June 2016 to June 2017 to find out how Filipinos talk about trust in the six institutions.

We found out that while social media conversations capture only part of the picture, they nonetheless reflect on-the-ground realities about Filipino trust. Out of the six institutions, the Government (11,394), the Media (3,298) and the Church (2,006) were the most meaningfully discussed on social media, meaning the institutions were mentioned in posts that were relevant to the overall topic of trust in institutions, even though the Business Sector (6,721) and the Academe (3,833) garnered more mentions than the latter two.

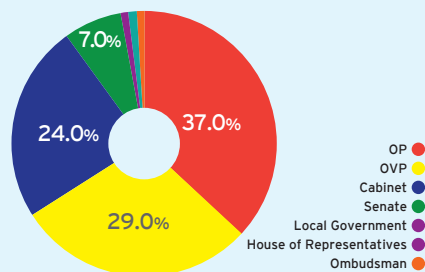
### WHEN WE DUG DEEPER, WE FOUND THESE THREE HIGHLIGHTS FROM SOCIAL MEDIA:

- The government was the most discussed institution on social media, and it also had the smallest share of negative mentions out of all the times it factored into conversations compared to other institutions.** Going down to the level of sub-institutions, the Office of the President (37%) and the Office of the Vice President (29%) were the most mentioned, with the former garnering the most positive sentiments and the latter, the most negative.

Sentiment Meter: Institutions on Social Media

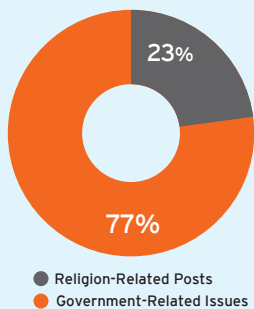


Share of Voice: Government Sub-Institutions

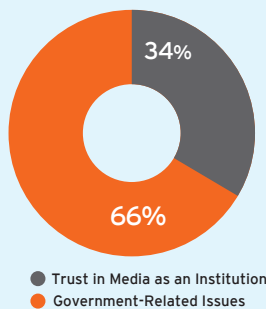


- The majority of online conversations about both the church and the media focused on government-related topics, and these were also from where the negative sentiments of Filipino netizens stemmed.** For the church, most of these government-related posts centered on peace and security issues (e.g., war on drugs, death penalty, extrajudicial killings), while for the media, the posts were largely about government personalities and often in the context of these personalities lambasting the media.

Topics of Conversations about the Church



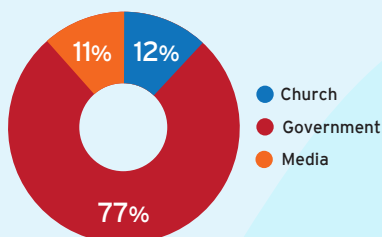
Topics of Conversations about the Media



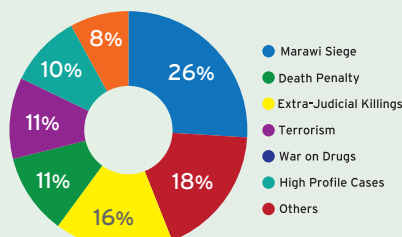
The Roman Catholic Church (55% of total mentions) was the most mentioned by Filipinos online. It was followed by non-denominational Christianity (25%), Islam (12%) and Iglesia Ni Cristo (8%).

- Out of all the issues covered by the different trust drivers of the six institutions, peace and security were the most discussed online** - and not just in relation to the government, but to the church and to the media as well. More specifically, the Marawi and Martial Law issues were the most discussed by people online, followed by the death penalty, extra-judicial killings, war on drugs and violent groups like the Abu Sayyaf and the NPA.

Share of Voice: Peace and Security



Peace and Security Conversation Topics



Presented by:



## About EON

The EON Group is a fully integrated communications agency committed to the vision of truth-telling as a compelling instrument for meaningful and lasting change. Through the years, EON focused on achieving synergies among its four practice areas - Corporate and Marketing public relations (EON PR), reputation management and public affairs (ENGAGE), creative technology (DIG), and experiential marketing (TANGERINE). Fuelled by highly specialized and diverse disciplines, The EON Group champions imaginative storytelling that is grounded firmly on data and analytics. As a leading communications agency in the ASEAN region, the company has been shortlisted by the Holmes Report for three consecutive years as Southeast Asia Consultancy of the Year. It is also the recipient of the two ASEAN Business Awards in 2013 and is the lone Philippine firm in Global PRWeek's Agency Business Report for 2016 and 2017.

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