



TRUST.  
RELATIONSHIPS.  
LEADERSHIP.



ENGAGE



**Junie del Mundo**  
Chief Executive, EON

In 2011, we undertook a pioneering research with the goal of gaining a better understanding of the Filipinos’ concept of trust as it relates to institutions around them. Since then, the Philippine Trust Index became a yearly endeavor that supports EON’s vision of leveraging trust and communication in building better, stronger Filipino institutions.

Over the past four years of working on the PTI, we have witnessed the dynamic nature of trust among Filipinos. From simply wanting to capture how people experienced the institutions around them and their expectations from these groups, we uncovered so many insights that widened our understanding of the dynamic interplay of trust between Filipinos and these institutions.

Our first study in 2011 revealed that Filipinos in general kept a good level of trust in most institutions, especially the Church, followed by the Media as a distant second. The study also showed that integrity, efficiency, responsiveness to needs and being results-oriented were the key drivers to gaining trust.

In the succeeding years, we were pleased to note that the key trust drivers across institutions now included protection of the environment and contribution to nation building – two items that were not part of the general consciousness and conversations before this study.

Specific to institutions, we also learned that being incorruptible and the ability to deliver results are important trust drivers for Government, while being incorruptible and free of political interests drove trust for NGOs. For Business as well as Government and NGOs, the ability to communicate emerged as a very important trust driver.

Understandably, we have seen some swings in trust ratings throughout the years. We have introduced enhancements to our research methodologies to better capture these insights, which mean that some data sets may not be comparable year to year. However, our goal is not to simply measure trust levels, but to make the PTI an evolving research adaptive to the times. Among the enhancements we implemented was to add the Academe among the stakeholder groups we studied, increasing the number of respondents to 1,600 from just 500 in the very first run, expanding the profile of interviewees to include both informed and general publics from urban and rural areas, and adding a qualitative aspect through FGDs, to our quantitative face to face interviews. Last year, we also began looking at institutions’ performance vis-à-vis trust drivers. We likewise tracked results against our benchmark figures, allowing us some glimpses into the evolution of trust-building among Filipinos.

For the 2015 PTI, we took another step closer at the Filipinos’ perceptions of an engaging leader in both the public and private sectors, with the goal of understanding the role leaders play in trust-building. These findings, we believe, will provide fresh insights that would better guide us at EON in delivering strategic and timely advice to our partners and clients.

With the deeper insights that it is able to reveal year on year, the Philippine Trust Index has proven a valuable resource into the heart of what gains the trust of Filipinos. And even as we continuously enhance our methods and expand our coverage, our vision for the Philippine Trust Index remains the same: that it becomes the important nation-building tool that we have always intended it to be.



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# The Philippine Trust Index

The Philippine Trust Index (PTI) is EON’s proprietary research that culls insights and opinions of Filipinos from various socioeconomic, educational and demographic backgrounds hailing from urban and rural areas all over the country.

The respondents shared their opinions about six key Philippine institutions – the Government, the Business Sector, the Media, Non-Governmental Organizations, the Church, and the Academe – to shed light on the levels and drivers of trust of the Filipino people. This year, the PTI has expanded to include the Filipino peoples’ perceptions of an engaging leader in both the public and private sectors to understand the leadership qualities most valued by the people.

For the fourth iteration of the PTI, EON collected responses from 1,620 Filipinos from July to August 2015. Out of the universe of respondents, 1,200 are considered the general public and representative of the country as a whole. An additional 420 screened respondents were also added to come up with 600 respondents who deemed the informed public; these are Filipinos who are at least college graduates and who access media for news at least thrice a week.

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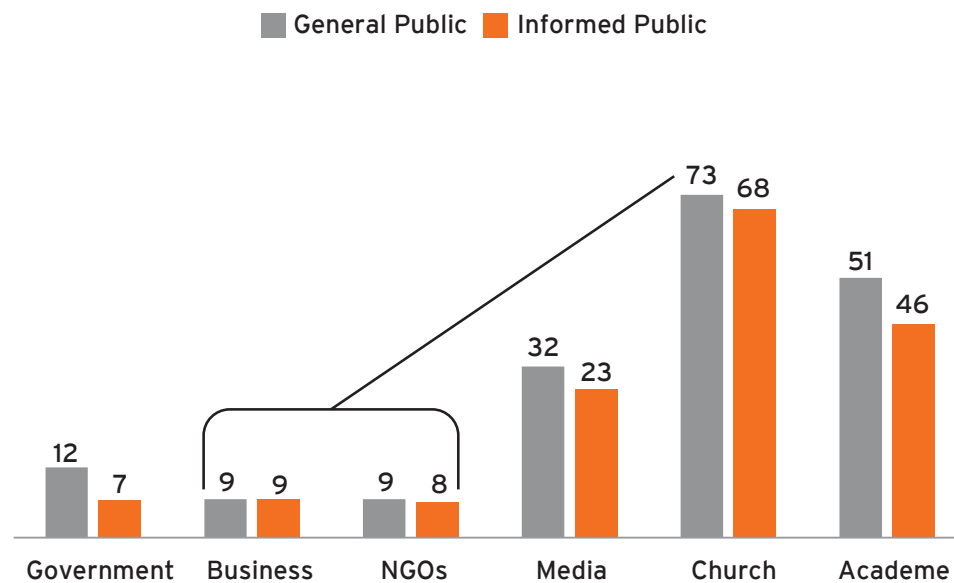
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## The State of Trust

For the fourth year running, the Church is deemed as the most trusted institution in the nation with 73% of the general public and 68% of the informed public trusting the Church “very much”. The Academe remains to be the second most trusted institution since its inclusion to the PTI, though far fewer Filipinos claim to trust the Academe “very much” compared to the Church. Maintaining its position as the third most trusted institution is the Media.

Retaining their position as the Filipinos’ three least trusted institutions are the Government, the NGOs, and the Business Sector. This year, the Government has regained the favor of Filipinos, overtaking the Business Sector and NGOs with 12% of the general public claiming to trust the Government “very much”. Both the Business Sector and NGOs lost favor among the people as these institutions tie as the least trusted with only 9% of the general public claiming to very much trust either of the institutions. The low trust in businesses and NGOs become more glaring when compared to the trust ratings given to the highest rated institution. There is a 64 percentage point trust gap between the Church and the two lowest-rated institutions.

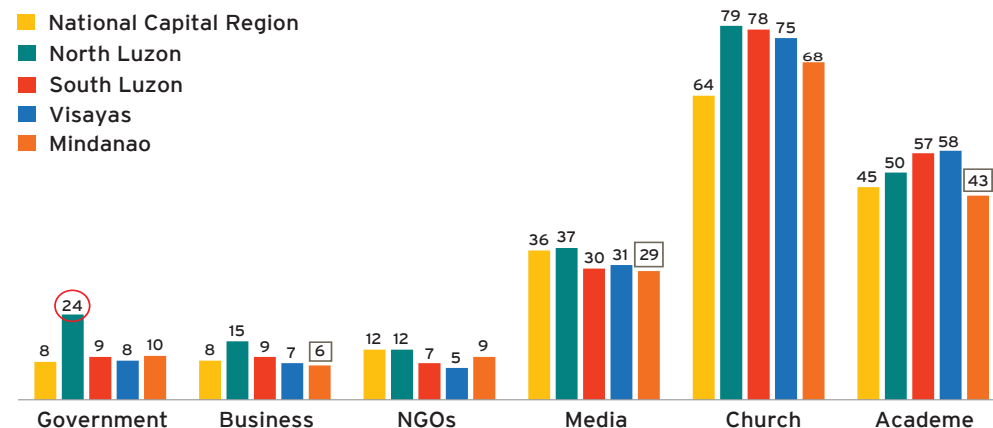
### THE STATE OF TRUST IN INSTITUTIONS



While the informed public generally trusts institutions less than the general public, the most trust gap between the two publics is experienced by the Media.

For 2015, North Luzon gave the highest trust ratings to institutions. North Luzon’s propensity to trust more than the national average is most notable in the ratings it gave the Government - 24% compared to 8% in NCR and Visayas. On the other hand, Filipinos in Mindanao are less trusting of institutions compared to other regions in the country, giving the lowest trust ratings to the Academe, Business Sector, and Media.

### TRUST IN INSTITUTIONS BY REGION



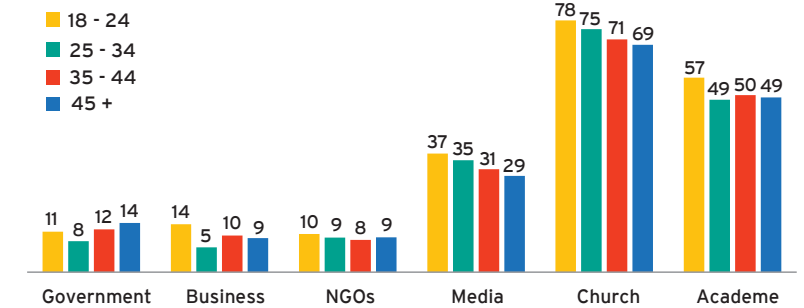
Filipinos aged 18 to 24 years are the most trusting among all age groups, giving the highest ratings to most institutions with the sole exception of the Government. The 18 to 24 age demographic is more trusting of the Academe compared to the older age groups. On the other hand, Filipinos aged 25 to 34 years are the least trusting of Government and Business. There is also a perceivable decline in trust levels in the Media and the Church as Filipinos age.

For the three least trusted institutions, trust ratings are relatively equal among the different socioeconomic classes although the AB and Upper C classes are visibly more trusting of businesses than Lower C and DE classes. On the other hand, the Upper C class is significantly less trusting of the Church and the Academe compared to other classes. The most notable trust gap, however, is experienced by the Media as the Lower C and DE classes are largely more trusting of the institution compared to the AB and Upper C classes. There is a 22 percentage point difference in the Lower C’s trust in Media versus the AB’s trust in Media.

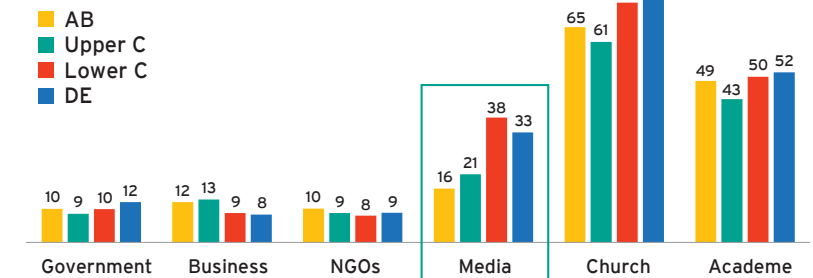
However, while there have been slight increases and decreases in the levels of trust in institutions, particularly following notable nationwide events and issues, trust ratings of most institutions have barely moved since 2012 for both the general and informed publics. Movement is instead more perceivable in the trust ratings of sub-institutions that have been rising and falling considerably over the years.

There is no unified “millennial” (18 to 34 years old) outlook on trust.

### TRUST IN INSTITUTIONS BY AGE GROUP



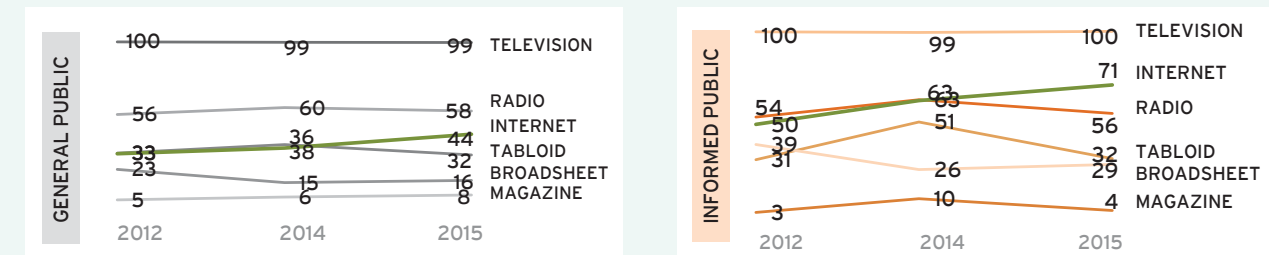
### TRUST IN INSTITUTIONS BY SOCIOECONOMIC STATUS



## Trust in Information Sources: The Rise of Digital

While television remains to be the usual source of information of Filipinos, there is a significant leap in internet usage, especially among the youth. Usage of Internet rose from 33% in 2012 to 44% in 2015 among general public and from 50% in 2012 to 71% in 2015 among informed public. This incline is in contrast with the decline experienced by publications - both broadsheets and tabloids.

### USUAL SOURCES OF INFORMATION





Trust in online media has also risen considerably as trust in other top sources of information plateau or even decline. Television remains to be the most trusted source of information about all six institutions. For information about the Government, NGOs, and the Media, radio is the second most trusted source. For businesses, newspapers take this rank. However, for the Church and the Academe, colleagues, family and friends are the second most trusted sources of information.

MOST TRUSTED SOURCES OF INFORMATION

GOVERNMENT				
	2012	2014	2015	
Television	57	58	58	
Radio	13	15	14	
Internet	n/a	n/a	9	
Newspapers	13	10	8	
Colleague, family, or friend	5	3	3	
Online news sites of newspaper	7	5	3	
Social media	1	3	3	
Website	2	3	1	
Forum / conferences/ seminars	n/a	0.8	0.4	
Magazines	1	0.4	0.3	
Information materials	0.3	0.1	0.1	
INTERNET/ ONLINE COMBINED	10	11	16	

BUSINESS				
	2012	2014	2015	
Television	46	43	45	
Newspapers	14	15	11	
Radio	10	12	10	
Internet	n/a	n/a	9	
Colleague, family, or friend	8	6	6	
Online news sites of newspaper	8	7	4	
Social media	4	4	4	
Website	4	4	3	
Magazines	4	3	2	
Information materials	3	2	2	
Forum / conferences/ seminars	n/a	2	2	
INTERNET/ ONLINE COMBINED	16	15	20	

NGOs				
	2012	2014	2015	
Television	45	50	49	
Radio	11	15	14	
Newspapers	10	11	10	
Colleague, family, or friend	11	6	7	
Internet	n/a	n/a	5	
Forum / conferences/ seminars	n/a	3	3	
Website	2	3	3	
Social media	3	3	3	
Information materials	3	2	2	
Online news sites of newspaper	4	4	2	
Magazines	1	0.9	0.6	
INTERNET/ ONLINE COMBINED	9	10	13	

CHURCH				
	2012	2014	2015	
Television	41	35	38	
Colleague, family, or friend	31	28	28	
Radio	8	10	9	
Forum / conferences / seminars	n/a	13	9	
Newspapers	6	4	4	
Information materials	5	3	3	
Internet	n/a	n/a	3	
Website	2	1.8	1.4	
Social media	1.7	1.9	1.4	
Online news sites of newspaper	2.7	1.5	0.6	
Magazines	1	0.4	1	
INTERNET/ ONLINE COMBINED	6	5	6	

MEDIA				
	2012	2014	2015	
Television	58	60	58	
Radio	16	18	16	
Newspapers	11	10	9	
Internet	n/a	n/a	5	
Colleague, family, or friend	5	3	3	
Social media	1	2	2	
Online news sites of newspaper	4	3	2	
Website	1	2	1	
Magazines	1	1	1	
Forum / conferences / seminars	n/a	1	0.4	
Information materials	1	0.4	0.3	
INTERNET/ ONLINE COMBINED	6	7	10	

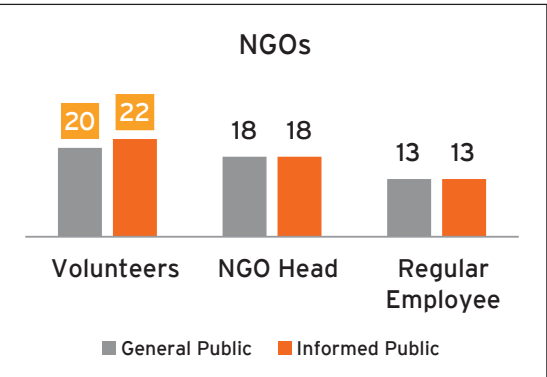
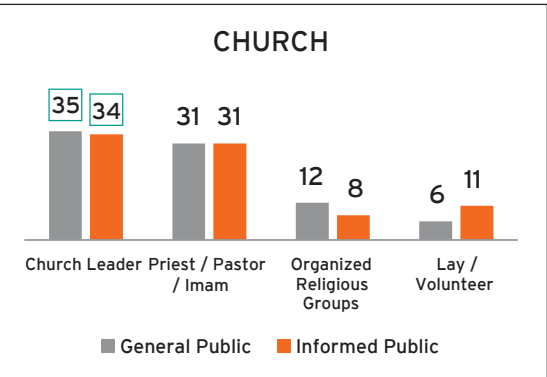
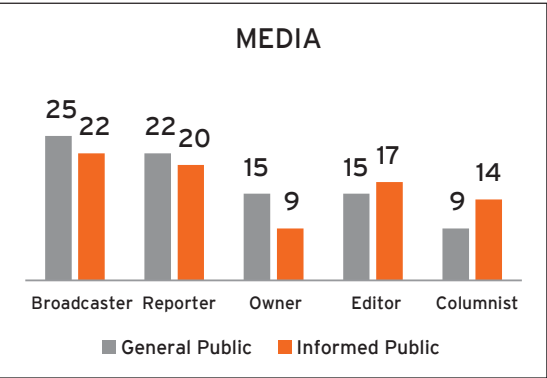
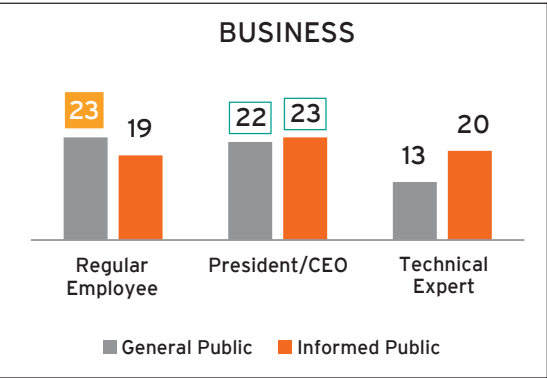
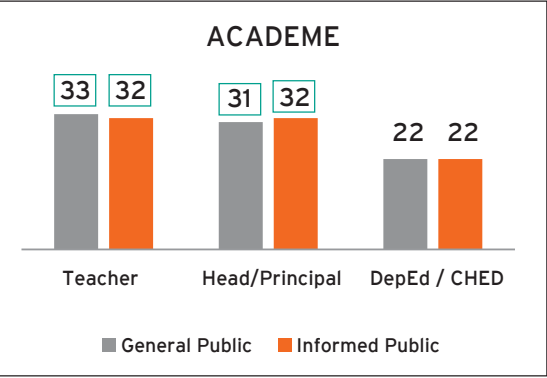
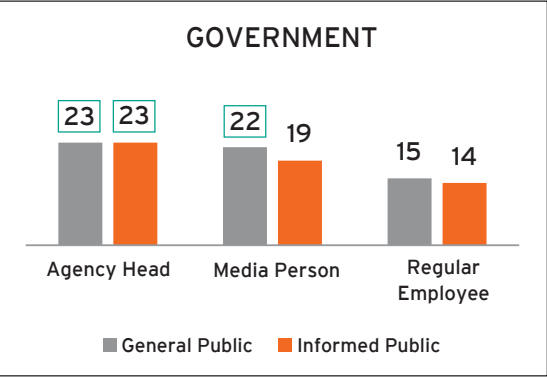
ACADEME				
	2012	2014	2015	
Television	40	36	38	
Colleague, family, or friend	26	24	23	
Radio	7	9	8	
Internet	n/a	n/a	7	
Information materials	6	7	6	
Forum / conferences / seminars	n/a	5	5	
Newspapers	7	6	5	
Social media	3	4	3	
Website	5	5	2	
Online news sites of newspaper	5	3	2	
Magazines	2	1	1	
INTERNET/ ONLINE COMBINED	13	12	14	

\* “Forums/ conferences/ seminars” was only added as a response option in 2014 PTI while “Internet” was only added in 2015 PTI

When asked who they consider the most credible persons to give information about institutions, Filipinos trust institution heads as spokespersons for the Government, Businesses, the Church and the Academe. However, the general public also believes information coming from the Media just as much as government agency heads. In businesses, regular employees are just as trusted as company executives, while in the Academe, teachers are just as trusted as heads of schools.

On the other hand, the public is more likely to trust information about NGOs that come from volunteers - those who are neither fully external nor fully internal to the organizations.

MOST TRUSTED SPOKESPERSONS

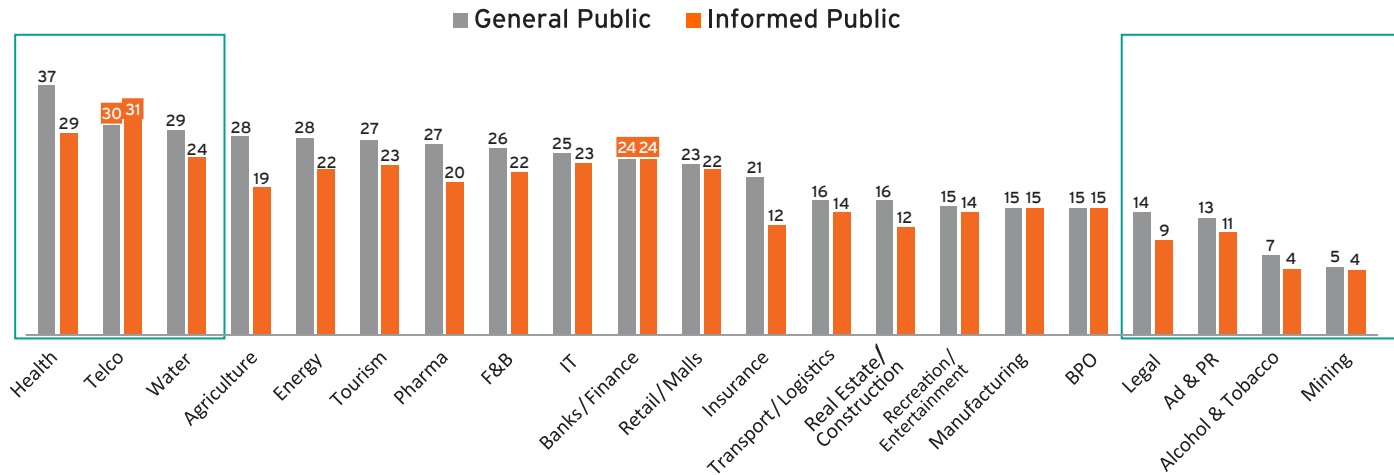




## Trust in Businesses

The Healthcare, Telecommunications, and Water Services sectors lead as the most trusted industries among the Business Sector. Healthcare has been the most trusted industry since 2012, experiencing a steady increase in trust levels since then. On the other hand, Legal Services, Advertising and Public Relations, Alcohol and Tobacco, and Mining industries are the least trusted institutions in 2015.

### TRUST IN BUSINESSES BY INDUSTRY



Out of all the industries covered by the survey, Telecommunications as well as Banks and Financial Services gained the most favor from Filipinos. Trust ratings on both industries moved up 6 notches among the general public and 11 notches among the informed public from 2012.

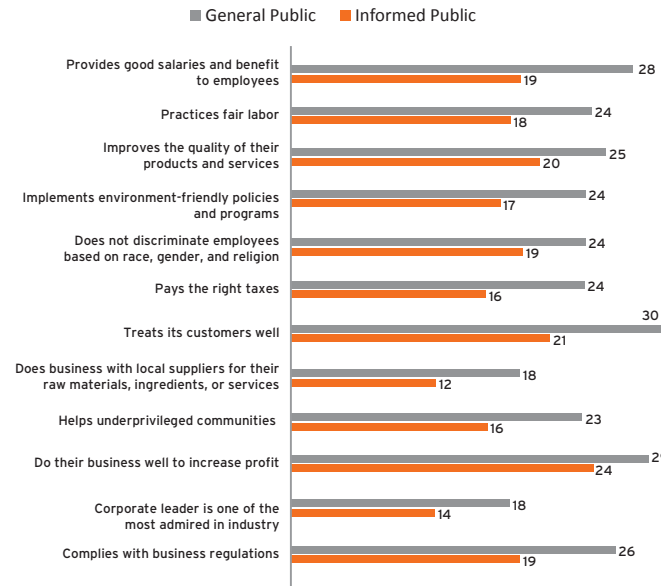
Trust in businesses is heavily driven by how companies treat their employees - a constant concern of Filipinos since the first PTI. Almost half of the informed public listed employee-focused criteria among their main trust drivers. Both the general and informed publics cite "provides good salaries and benefits" as well as "practices fair labor" as the top two drivers of trust in businesses.

### DRIVERS OF TRUST IN BUSINESSES



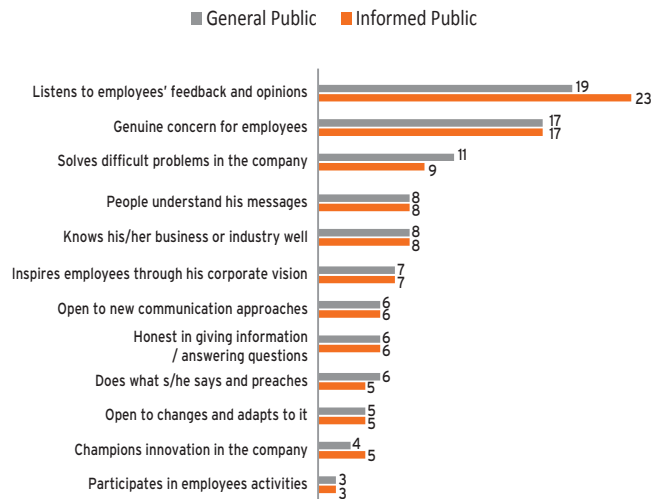
When asked to list their most trusted companies in the Philippines, almost one in every three companies mentioned are either manufacturers or malls. A total of 30% of the general public and 36% of the informed public enumerated companies in the Manufacturing sector, while 28% of the general public and 27% of the informed public named malls and supermarkets. Other sectors often mentioned include banks and utility companies.

### PERFORMANCE RATINGS FOR THE DRIVERS OF TRUST IN BUSINESSES



On the leadership front, the general public's most valued qualities of a business leader are the willingness to listen to employees' feedback and a genuine concern for employees. These further prove that trust in the Business Sector is primarily driven by how employees are treated.

### MOST VALUED QUALITIES OF A BUSINESS LEADER



However, only 23% of the general public and 18% of the informed public strongly agree that local CEOs listen to their employees' feedback. Business leaders today fare best when rated for their knowledge of their business and industry - a trait that ranks fifth among the most valued qualities of a business leader.

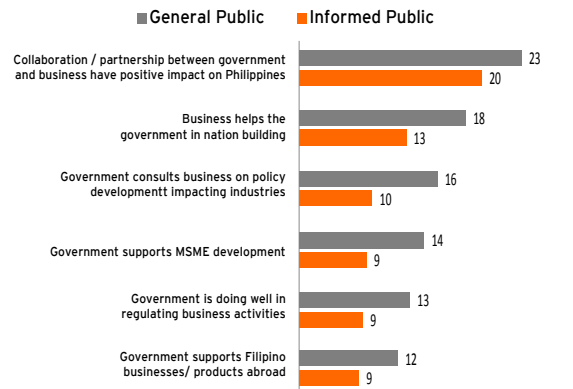
### PERFORMANCE OF CEOS TODAY AGAINST THE MOST VALUED QUALITIES OF A BUSINESS LEADER



### Building Trust in the Government and Businesses

Filipinos largely disagree that the Government and Businesses work together well. Only two in every ten Filipinos think that partnerships between the Government and Businesses positively impact the Philippines. Fewer Filipinos believe that businesses help the Government in nation building, while only 12% of the general public believes that the Government helps Filipino businesses that expand abroad.

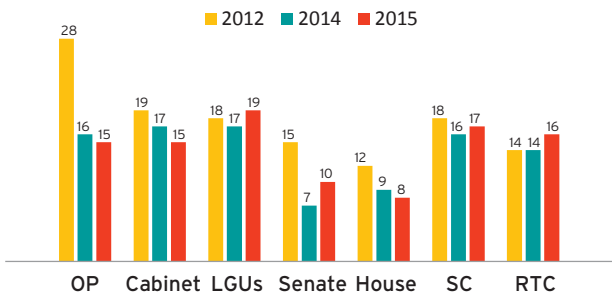
### RATINGS PUBLIC - PRIVATE SECTOR RELATIONSHIP



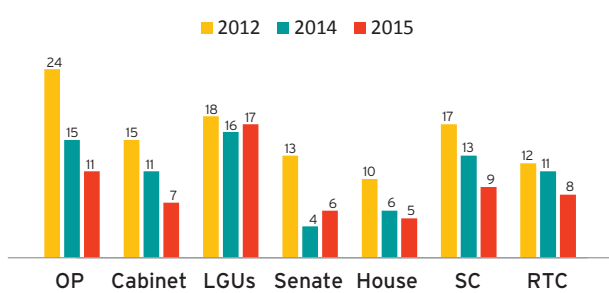
## The Declining Trust in Government

In the eyes of both the general and informed publics, Local Government Units enjoy the highest trust ratings among the different government sub-institutions while the House of Representatives is the least trusted. The largest loss of trust was felt by the Office of the President, declining by a 13 percentage point, since 2012. On the other hand, the Senate is recovering the trust of the people this 2015 after its steep loss between 2012 and 2014.

TRUST IN GOVERNMENT SUB-INSTITUTION  
(GENERAL PUBLIC)



TRUST IN GOVERNMENT SUB-INSTITUTION  
(INFORMED PUBLIC)



When segregated by region, Filipinos in North Luzon gave the highest trust ratings for government sub-institutions, often with large gaps between North Luzon's ratings and the average ratings of the other regions. On the other hand, Mindanao usually gave the lowest ratings, except for Local Government Units, for which Mindanao gave the highest trust ratings among all regions.

TRUST IN GOVERNMENT SUB-INSTITUTION  
BY REGION

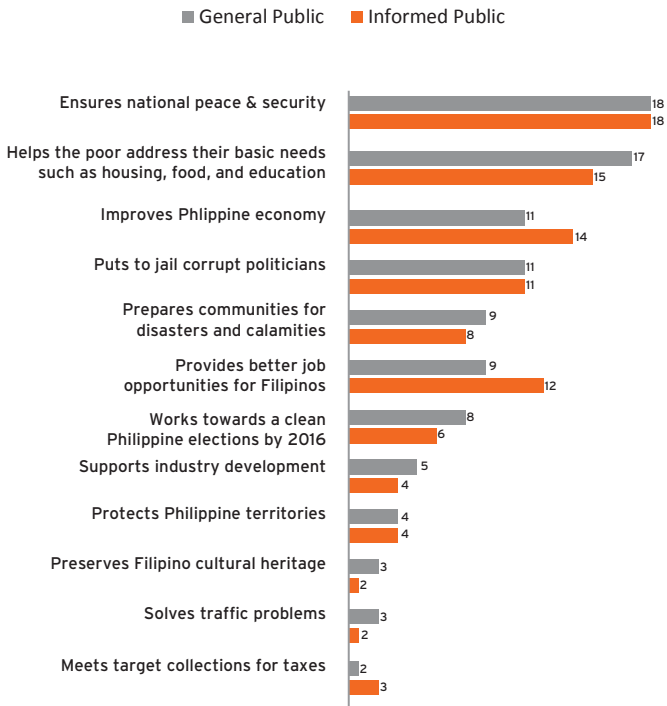
	National Capital Region	North Luzon	South Luzon	Visayas	Mindanao
LGU	12	23	17	19	24
SC	18	27	15	15	10
RTC	17	27	12	15	9
Cabinet	12	27	12	11	15
OP	10	23	16	16	9
Senate	8	18	18	8	6
House	8	13	7	6	5

When asked to cite a specific government agency that they trust, three out of ten respondents said that they do not trust any.

In 2014, "free of corruption" was named the most important trust driver. This year, the foremost driver of the Filipino's trust in the Government is its ability to ensure national peace and security. This is followed closely by "helps the poor address basic needs", "improves the Philippine economy", and "puts corrupt politicians to jail". This creates a mix of political, social and economic considerations in building trust.

Three out of every ten Filipinos do not trust any government agency.

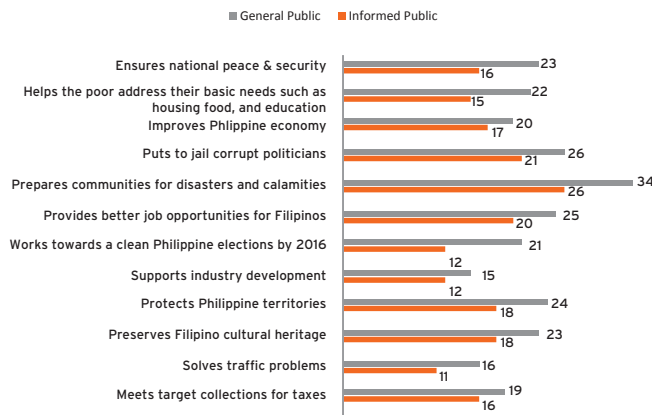
DRIVERS OF TRUST IN THE GOVERNMENT



Filipinos largely believe that the Government is unable to succeed in meeting these different criteria for trust. Only 23% of the general public strongly agrees that the government is able to ensure peace and security, while only 22% agrees that the Government helps the poor address their basic needs. Filipinos see disaster preparedness as the area where the Government has achieved the most success.

Preparedness in times of calamities and disasters is a trust driver that is increasingly at the forefront of the people's minds. Regardless of socioeconomic status, this criterion remains among the top 6 trust drivers in the Government.

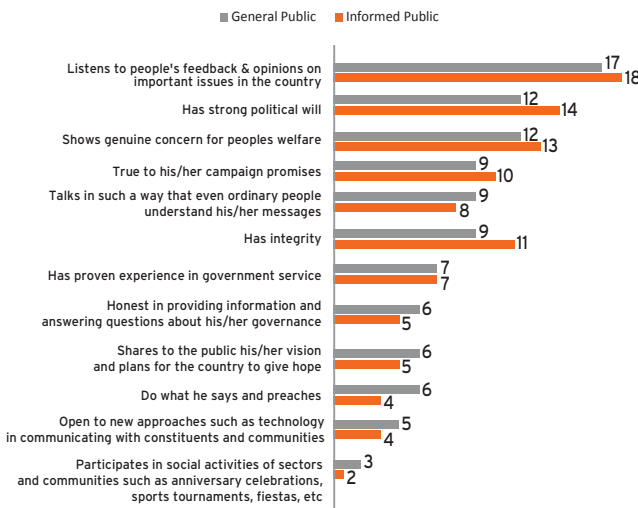
PERFORMANCE RATINGS FOR THE DRIVERS OF TRUST IN THE GOVERNMENT



## Assessing Today's Leader

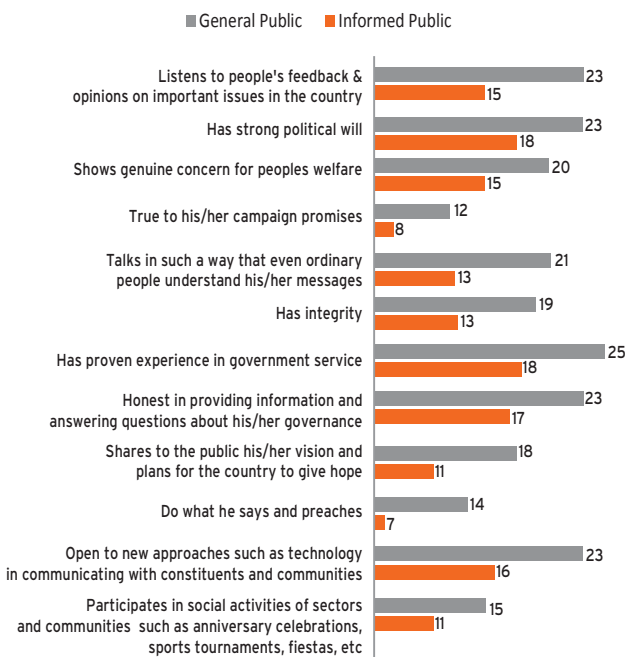
For Filipinos, the most important quality of a leader is their willingness to listen to what the people have to say. For government leaders, this trait is deemed most important by 17% of the general public. It is also important to both the general and informed publics that government leaders have strong political will and show genuine concern for the people.

MOST VALUED QUALITIES OF A GOVERNMENT LEADER



Communication is at the heart of good leadership. For Filipinos, the most important quality of a leader is their willingness to listen to what the people have to say. This is true for both government and business leaders.

PERFORMANCE OF GOVERNMENT TODAY AGAINST THE MOST VALUED QUALITIES OF A GOVERNMENT LEADER



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## About EON

Offering a holistic approach to communication, EON has expanded its service portfolio beyond public relations to include highly specialized areas such as corporate positioning and brand building, public affairs and government relations, research and communication planning, international conference management, advocacy and development communication, online community building, event and activation campaign management, coaching and executive training among other critical fields.

EON's four business units each have a distinct yet complimentary menu of services that enable clients to capably meet the requirements of their valued stakeholders. With a team of over 100 experts in the fields of media, advertising, branding, marketing, digital communication, government relations and diplomacy, tourism, civil service and public policy, research, finance, economics, sociology, education, design, and cultural studies, EON harnesses the powerful integration of various disciplines to provide primary resources for end-to-end communication.

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