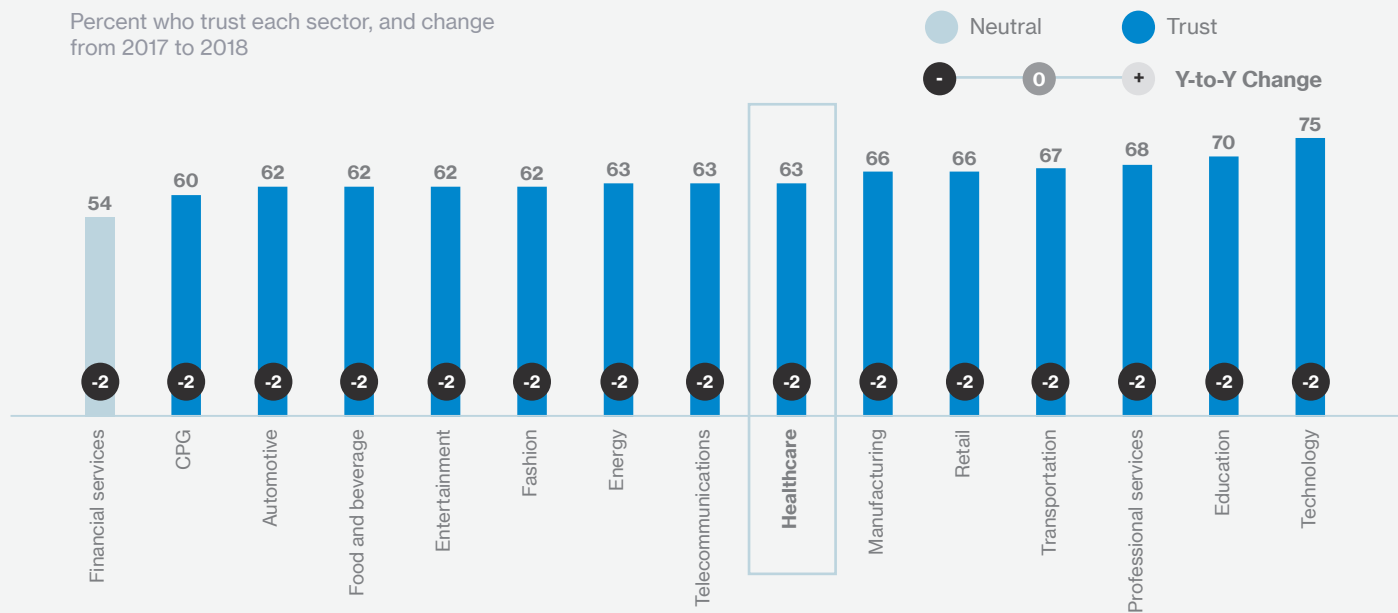


The Trust Health Barometer Top 5

1. Trust in overall global health sector is declining

But in the UK, trust in health is 68-points.

Percent who trust each sector, and change from 2017 to 2018

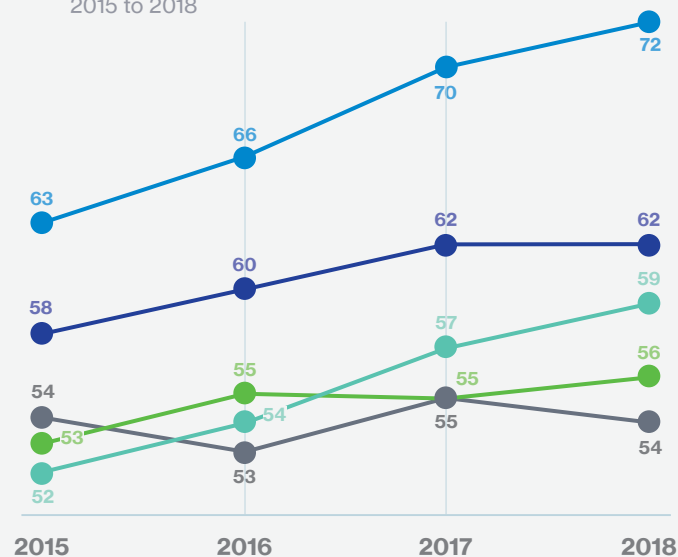


FACTS

- Global declines in 10 of 15 sectors
- In the UK, trust in healthcare is 68-points - the second most trusted sector after education

2. Trust in specific sub-sectors of global health is increasing

Percent trust in the health sub-sectors, 2015 to 2018



FACTS

- Worldwide, 54% trust the pharmaceutical industry to do the right thing
- UK trust is higher with trust in hospitals/clinics (76%), consumer health (61%), biotech/life sciences (58%), health insurance (56%) and pharmaceuticals (48%)

Change, 2015 to 2018

Sub-sector	4 yr. trend
Hospitals / clinics	+9
Biotech / life sciences	+4
Health insurance	+7
Consumer health	+3
Pharmaceuticals	0

3. Major fluctuations in trust in health across markets

Percent trust in the healthcare sector, and change from 2017 to 2018



FACTS

- Fluctuations in trust in health mirror polarization of trust across all sectors this year with an **aggregate 37-point drop in trust in U.S.**

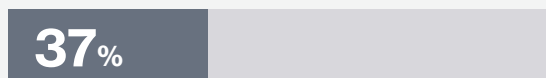
4. Social media is increasingly important

Globally, which is more believable about a company?

Social Media



Advertising



5. Call for business leadership

Worldwide, **64%** say CEOs should lead on change rather than waiting for government to impose it



FACTS

- 65%** get their news through platforms such as social media, search or news applications
- 5-point global** increase in trust in journalism as source for general news and information in **last 6 years**

FACTS

- In the UK**, trust in business is **11 points higher** than trust in government
- 14pt increase** in CEO credibility year-on-year
- For CEOs, building trust is the **#1** global priority