



#TrustBarometer

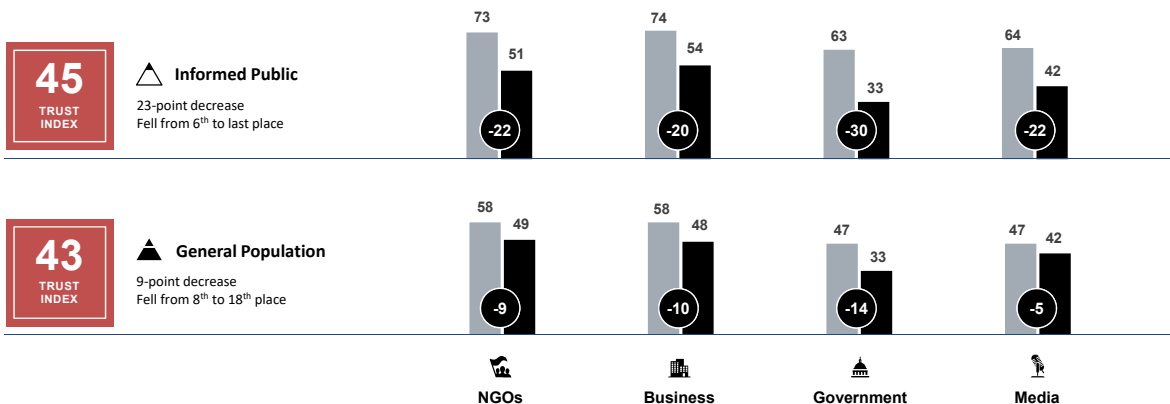
2018 Edelman Trust Barometer



Trust Crash in U.S.

Percent trust in each institution, and change from 2017 to 2018

2017 2018
 - 0 + Y-to-Y Change

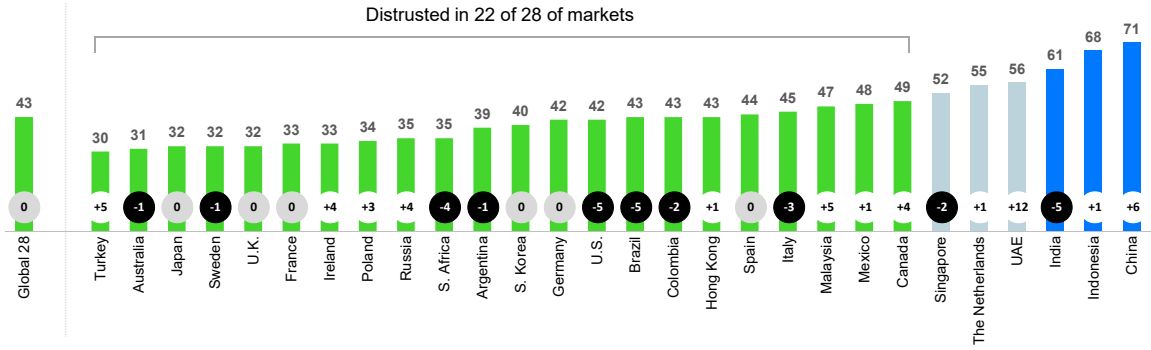


Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) Informed Public and General Population, U.S. The Trust Index is an average of a market's trust in the institutions of government, business, media and NGOs. Informed Public and General Population, U.S.

Media Now Least Trusted Institution

Percent trust in media, and change from 2017 to 2018

■ Distrust ■ Neutral ■ Trust
● ● + Y-to-Y Change

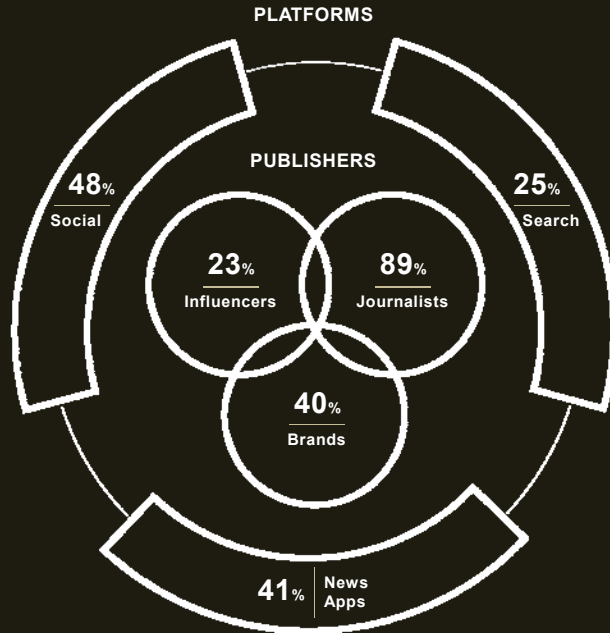


Source: 2018 Edelman Trust Barometer. TRU_INS. [MEDIA IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." (Top 4 Box, Trust) General population, 28-market global total.

People Define "Media" As Both Content and Platforms

What did you assume was meant by the phrase "media in general"?

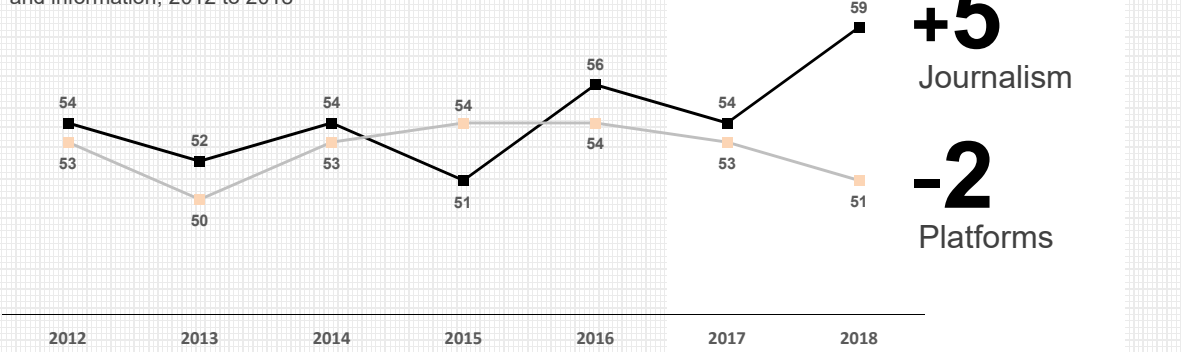
Source: 2018 Edelman Trust Barometer. TRU_MED. In the above question, what did you assume was meant by the phrase "media in general"? General population, 28-market global total. Social is a net of TRU_MEDr3 and r12, Influencers is r5, Search is r7, Brands is a net of r10 and r11, Journalists is a net of r1 and r6, News Apps is r8.



MEDIA | JOURNALISM | PLATFORMS

While Trust in Platforms Declines, Trust in Journalism Rebounds

Percent trust in each source for general news and information, 2012 to 2018



Source: 2018 Edelman Trust Barometer. COM_MCL. 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), question asked of half of the sample. General population, 25-market global total.

Journalism is an average of traditional media and online-only media. Platforms is an average of search engines and social media.

Use Multiple Formats to Earn Credibility

Which do you believe is giving you the truth?

51%
Personal experiences

59%
Video

65%
Spontaneous speaker

57%
Detailed argument

49%
Data

41%
Words

35%
Rehearsed speaker

43%
Short and simple argument



Source: 2018 Edelman Trust Barometer. COM_RFB. You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. For each pair, we want you to choose the one that you are more likely to believe is giving you the truth. While we know that some of these choices may not be easy, please do your best to select only one of the two options given the one that is most likely to be true most often. Choices shown to half of the sample. General population, 28-market global total.

Build on What Makes Peers Trustworthy and Relatable

Top three characteristics that give respondents a sense that "a person like them" is more trustworthy or credible than other sources

1.

They are very honest.
They always say what they truly believe

2.

They have nothing to gain from giving me bad information

3.

We see the world and think in the same way

Source: 2018 Edelman Trust Barometer. COM_PLM_TRU. Why are these kinds of people more trustworthy or credible in your mind than some other sources? Question asked of half of the sample and among those who answered codes 6-9 at COM_TAC/11. General population, 28-market global total.

DRIVE CHANGE. DRIVE ELECTRIC.



DRIVE CHANGE
DRIVE ELECTRIC

DRIVE CHANGE, DRIVE ELECTRIC TARGET AUDIENCES

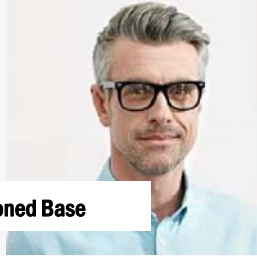


Grown Up Millennials

These older millennials are establishing their careers and their families; exurban and suburban

Mindset:

Their generation is drawn to electric cars but have concerns about "inconvenience" associated with ownership. However, once they're persuaded, they're more likely to purchase electric cars throughout their lives.



The Seasoned Base

Late Gen-X and Boomer men, educated and affluent

Mindset:

Generally favorable towards electric cars. Are considering an electric car given the savings on fuel costs but have specific concerns with regard to vehicle performance, range and charging station availability.



Next Chapter Women

Boomer women approaching retirement and empty nests

Mindset:

Have the least education about electric cars. Generally appreciate lower fuel costs and environmental benefits, but express anxiety about range and charging station availability.

WELCOME CHANGE

Removing Barriers to Purchase

Our testing showed that the biggest barrier to buying an electric vehicle was that consumers didn't understand how they work and fit into their day-to-day lives.

Adding Value to a Crowded Landscape

There are many websites and resources that exist that are focused on facts, incentives and other practical reasons for owning an electric car. *Drive Change. Drive Electric* was created to tackle the challenge of demystifying electric vehicle ownership from another perspective.

Welcome Change

Our strategy for success is to shift from selling the practical reasons for owning electric cars to selling the idea that not all change needs to be scary and that with small changes, electric car ownership is realistic and attainable.

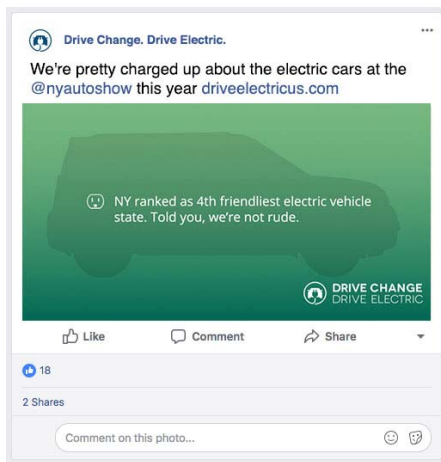


STORIES TARGETING LIFESTYLES

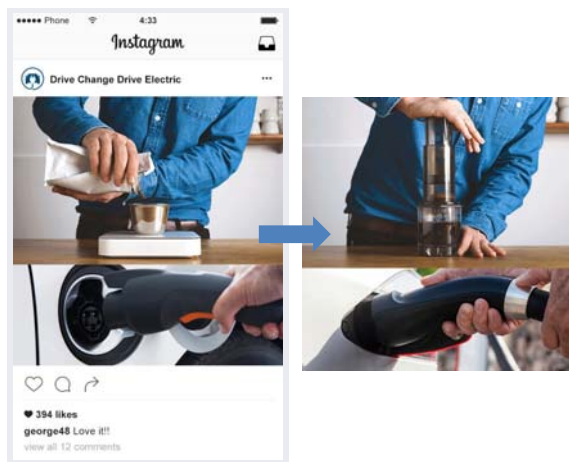


SOCIAL MEDIA LAUNCH CONTENT

Many Reasons



Easier Than



OTHER BRANDING EXAMPLES – PUBLIC ADVOCACY

#Loveisloveproject



PROJECT:TIME OFF