EDELMAN’S 14TH ANNUAL SURVEY, LARGEST GLOBAL EXPLORATION OF TRUST

**ONLINE SURVEY IN 27 COUNTRIES**
- 33,000+ respondents
- 6 years in 20+ markets
- 9 years in 10+ markets

**GENERAL POPULATION**
- 1000 respondents per country surveyed
- Ages 18+
- 3 years of data

**INFORMED PUBLICS**
- 500 respondents in U.S. and China & 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
- 14 years of data
EDELMAN TRUST BAROMETER IN RETROSPECT

2014
BUSINESS TO LEAD THE DEBATE FOR CHANGE

2013
CRISIS OF LEADERSHIP

2012
FALL OF GOVERNMENT

2011
RISE OF AUTHORITY FIGURES

2010
TRUST IS NOW AN ESSENTIAL LINE OF BUSINESS

2009
BUSINESS MUST PARTNER WITH GOVERNMENT TO REGAIN TRUST

2008
YOUNG INFLUENCERS HAVE MORE TRUST IN BUSINESS

2007
BUSINESS MORE TRUSTED THAN GOVERNMENT AND MEDIA

2006
“A PERSON LIKE ME” EMERGES AS CREDIBLE SPOKESPERSON

2005
TRUST SHIFTS FROM “AUTHORITIES” TO PEERS

2004
U.S. COMPANIES IN EUROPE SUFFER TRUST DISCOUNT

2003
EARNED MEDIA MORE CREDIBLE THAN ADVERTISING

2002
FALL OF THE CELEBRITY CEO

2001
RISING INFLUENCE OF NGOS
TRUST IN BUSINESS AND NGOS REMAINS STABLE, TRUST IN GOVERNMENT AND MEDIA DECREASES

TRUST IN THE FOUR INSTITUTIONS OF GOVERNMENT, BUSINESS, MEDIA AND NGOS, 2013 VS. 2014

<table>
<thead>
<tr>
<th>TOTAL TRUST</th>
<th>TRUST A GREAT DEAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>NGOS</td>
<td></td>
</tr>
<tr>
<td>BUSINESS</td>
<td></td>
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<tr>
<td>MEDIA</td>
<td></td>
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<tr>
<td>GOVERNMENT</td>
<td></td>
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2013 | 2014
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The Trust Index: Slight decline in trust over the past year with strong regional variations; major declines in Poland, U.S. & Mexico

<table>
<thead>
<tr>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GLOBAL</strong></td>
<td>57</td>
</tr>
<tr>
<td>China</td>
<td>80</td>
</tr>
<tr>
<td>Singapore</td>
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<td>India</td>
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<td>Mexico</td>
<td>68</td>
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<tr>
<td>Hong Kong</td>
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<tr>
<td>UAE</td>
<td>66</td>
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<td>Malaysia</td>
<td>64</td>
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<tr>
<td>Canada</td>
<td>62</td>
</tr>
<tr>
<td>Indonesia</td>
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<tr>
<td>U.S.</td>
<td>59</td>
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<tr>
<td>Netherlands</td>
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<tr>
<td>Brazil</td>
<td>55</td>
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<td>Germany</td>
<td>55</td>
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<td>France</td>
<td>54</td>
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<tr>
<td>Sweden</td>
<td>54</td>
</tr>
<tr>
<td>U.K.</td>
<td>53</td>
</tr>
<tr>
<td>Italy</td>
<td>51</td>
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<tr>
<td>Australia</td>
<td>50</td>
</tr>
<tr>
<td>Poland</td>
<td>48</td>
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<tr>
<td>S. Korea</td>
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<tr>
<td>Ireland</td>
<td>46</td>
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<tr>
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<td>Turkey</td>
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<tr>
<td>Japan</td>
<td>41</td>
</tr>
<tr>
<td>Russia</td>
<td>36</td>
</tr>
</tbody>
</table>

Trust Index is an average of a country’s trust in the four institutions of government, business, media and NGOs. 20-country global total (does not include Argentina, Hong Kong, Malaysia, Singapore, South Africa, Turkey, UAE).

**BIG TRUST INCREASES FROM 2013**
- UAE +13 pts.
- Indonesia +10 pts.
- Australia +10 pts.
- Argentina +8 pts.

**BIG TRUST DECREASES FROM 2013**
- Poland -13 pts.
- U.S. -10 pts.
- Mexico -9 pts.
SUBSTANTIALLY LOWER TRUST AMONG GENERAL PUBLIC THAN INFORMED PUBLIC

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

TRUSTERS

Neutral

Distrusters

GLOBAL TRUST DIFFERENCE OF 9 points

MARKETS WITH LARGEST PERCEPTION GAPS:

- UAE (15 pts.)
- Australia (14 pts.)
- Germany (13 pts.)
- France (13 pts.)
- Sweden (13 pts.)
TRUST IN NGOS ON THE RISE, WITH MAJORITY OF MARKETS AT OR ABOVE 60% TRUST LEVEL

TRUST IN NON-GOVERNMENTAL ORGANIZATIONS (NGOS), 2013 VS. 2014

HIGHER TRUST IN 17 COUNTRIES

LOWER/EQUAL TRUST IN 9 COUNTRIES

NGOs most trusted institution in 20 of the 27 countries surveyed in 2014
Q316-321. Thinking about different types of non-governmental organizations, please indicate how much you trust each type of NGO to do what is right using a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.

- Disaster Relief and Development: 66%
- Health: 64%
- Environmental: 63%
- Social Justice/Human Rights: 59%
- Labor: 56%
- Faith-Based: 46%
TRUST IN BUSINESS STABILIZES; WESTERN SKEPTICISM ENTRENCHED, DEVELOPING MARKETS SOAR

Trust in Business, 2013 vs. 2014

<table>
<thead>
<tr>
<th>Country</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>N.A.</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>58%</td>
<td>58%</td>
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<tr>
<td>UAE</td>
<td>63%</td>
<td>65%</td>
</tr>
<tr>
<td>Australia</td>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>Argentina</td>
<td>49%</td>
<td>48%</td>
</tr>
<tr>
<td>Germany</td>
<td>59%</td>
<td>58%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>57%</td>
<td>63%</td>
</tr>
<tr>
<td>South Korea</td>
<td>31%</td>
<td>39%</td>
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<tr>
<td>Indonesia</td>
<td>72%</td>
<td>74%</td>
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<tr>
<td>Brazil</td>
<td>70%</td>
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<td>Russia</td>
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<tr>
<td>Canada</td>
<td>64%</td>
<td>62%</td>
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<tr>
<td>China</td>
<td>52%</td>
<td>53%</td>
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<tr>
<td>Japan</td>
<td>82%</td>
<td>77%</td>
</tr>
<tr>
<td>U.K.</td>
<td>56%</td>
<td>53%</td>
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<tr>
<td>France</td>
<td>44%</td>
<td>43%</td>
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<tr>
<td>India</td>
<td>81%</td>
<td>79%</td>
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<tr>
<td>Ireland</td>
<td>44%</td>
<td>44%</td>
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<tr>
<td>Turkey</td>
<td>41%</td>
<td>43%</td>
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<tr>
<td>U.S.</td>
<td>44%</td>
<td>41%</td>
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<tr>
<td>Spain</td>
<td>62%</td>
<td>58%</td>
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<tr>
<td>Singapore</td>
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<tr>
<td>Netherlands</td>
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<tr>
<td>Mexico</td>
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<tr>
<td>Hong Kong</td>
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<tr>
<td>Italy</td>
<td>45%</td>
<td>45%</td>
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<tr>
<td>Poland</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Q11-14. [BUSINESS 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 9-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, 20-country global total.
FAMILY-OWNED AND SMALL- AND MEDIUM-SIZED BUSINESSES HAVE A TRUST ADVANTAGE EXCEPT IN ASIA; STATE-OWNED LEAST TRUSTED GLOBALLY

TRUST IN DIFFERENT TYPES OF BUSINESS – BY REGION

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 9-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.
GLOBAL TRUST IN MEDIA REVERTS TO 2010 LEVELS; NEARLY 80% OF COUNTRIES REPORT TRUSTING MEDIA LESS OVER THE LAST YEAR

TRUST IN MEDIA, 2013 VS. 2014

HIGHER TRUST IN 5 COUNTRIES

LOWER/EQUAL TRUST IN 21 COUNTRIES

Q11-14. [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 9-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, 20-country global total.
SIGNIFICANT TRUST DECLINE FOR GOVERNMENT; LARGEST TRUST DROPS IN U.S., FRANCE AND HONG KONG

TRUST IN GOVERNMENT, 2013 VS. 2014

<table>
<thead>
<tr>
<th>Institution</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>UAE</td>
<td>73%</td>
<td>63%</td>
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<tr>
<td>Australia</td>
<td>56%</td>
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<tr>
<td>Japan</td>
<td>53%</td>
<td>47%</td>
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<tr>
<td>Indonesia</td>
<td>40%</td>
<td>32%</td>
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<tr>
<td>Argentina</td>
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<td>Turkey</td>
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<tr>
<td>Brazil</td>
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<td>Germany</td>
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<td>S. Korea</td>
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<td>Russia</td>
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<td>Spain</td>
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<td>Sweden</td>
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<td>53%</td>
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<tr>
<td>India</td>
<td>42%</td>
<td>47%</td>
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<tr>
<td>U.K.</td>
<td>81%</td>
<td>76%</td>
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<tr>
<td>China</td>
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<tr>
<td>Malaysia</td>
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<td>58%</td>
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<tr>
<td>Canada</td>
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<tr>
<td>Italy</td>
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<td>Poland</td>
<td>30%</td>
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<tr>
<td>Ireland</td>
<td>32%</td>
<td>32%</td>
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<tr>
<td>Mexico</td>
<td>28%</td>
<td>21%</td>
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<tr>
<td>U.S.</td>
<td>41%</td>
<td>37%</td>
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<tr>
<td>France</td>
<td>49%</td>
<td>42%</td>
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<tr>
<td>Hong Kong</td>
<td>50%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Q11-14. [GOVERNMENT 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 9-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, 20-country global total.
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 9-point scale where one means that you ‘do not trust them at all’ and nine means that you ‘trust them a great deal’. (4 Box, Trust) Informed Publics in 20-country global total.
4 KEY FACTORS SHAPE TRUST IN BUSINESS

- Industry Sector
- Leadership/CEO Trust
- Enterprise Type
- Country of Origin (Headquarters)
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 9-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.
SOME SCEPTICISM IN AUSTRALIA

AUSTRALIA TRUST IN COMPANIES HEADQUARTERED IN THE FOLLOWING COUNTRIES

MOST TRUSTED

- Canada: 82%
- Sweden: 81%
- Germany: 79%
- Switzerland: 79%
- U.K.: 74%
- The Netherlands: 74%
- Japan: 68%
- U.S.: 62%
- France: 61%
- South Korea: 50%
- Italy: 46%
- Spain: 42%
- Brazil: 29%
- China: 26%
- Russia: 25%
- Mexico: 22%
- India: 20%

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 9-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.
HIGH SCORE IN CHINA, BUT, CHINA IS A HIGH TRUST NATION

CHINA TRUST IN COMPANIES HEADQUARTERED IN THE FOLLOWING COUNTRIES

MOST TRUSTED

<table>
<thead>
<tr>
<th>Country</th>
<th>Trust Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>91%</td>
</tr>
<tr>
<td>Switzerland</td>
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<td>Japan</td>
<td>66%</td>
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<tr>
<td>Mexico</td>
<td>65%</td>
</tr>
<tr>
<td>India</td>
<td>52%</td>
</tr>
</tbody>
</table>
MIDDLE OF THE ROAD IN SINGAPORE

SINGAPORE TRUST IN COMPANIES HEADQUARTERED IN THE FOLLOWING COUNTRIES

MOST TRUSTED

- Sweden: 87%
- U.K.: 86%
- Germany: 84%
- Switzerland: 84%
- Japan: 84%
- Canada: 80%
- U.S.: 79%
- The Netherlands: 77%
- South Korea: 76%
- France: 72%
- Italy: 61%
- Spain: 57%
- Brazil: 48%
- Russia: 42%
- Mexico: 39%
- China: 37%
- India: 36%

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 9-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.
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 9-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.
Being American is not an issue in the majority of your markets. Technology versus Energy provides you with a much wider swing.
TECHNOLOGY CONTINUES TO LEAD, BANKS TRAIL
TRUST IN INDUSTRIES, 2009 VS. 2014

**2009**
- TECHNOLOGY: 76%
- AUTOMOTIVE: 58%
- FOOD AND BEVERAGE: 56%
- CONSUMER PACKAGED GOODS: 54%
- ENERGY: 55%
- PHARMACEUTICALS: 53%
- MEDIA: 43%
- BANKS: 47%

**2014**
- TECHNOLOGY: 79%
- AUTOMOTIVE: 70%
- FOOD AND BEVERAGE: 66%
- CONSUMER PACKAGED GOODS: 65%
- ENERGY: 59%
- PHARMACEUTICALS: 59%
- MEDIA: 51%
- BANKS: 51%

**2009 VS. 2014**
- TECHNOLOGY: +3
- AUTOMOTIVE: +12
- FOOD AND BEVERAGE: +10
- CONSUMER PACKAGED GOODS: +11
- ENERGY: +4
- PHARMACEUTICALS: +6
- MEDIA: +8
- BANKS: +4

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 9-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, 20-country global total.
THE TOP THREE AND BOTTOM THREE MARKETS FOR TRUST IN FINANCIAL SERVICES, FOOD & BEVERAGE AND ENERGY INDUSTRIES

LEVELS OF TRUST IN INDUSTRY – TOP THREE & BOTTOM THREE COUNTRIES

**FINANCIAL SERVICES INDUSTRY**
- China: 76%
- Indonesia: 74%
- India: 70%
- UAE: 76%
- Mexico: 76%
- Poland: 42%
- Russia: 43%
- Spain: 24%
- Ireland: 23%
- Germany: 23%

**FOOD & BEVERAGE INDUSTRY**
- India: 79%
- UAE: 76%
- Mexico: 76%
- Turkey: 43%
- Russia: 43%
- Poland: 42%
- Sweden: 36%
- U.K.: 31%

**ENERGY INDUSTRY**
- India: 81%
- China: 78%
- UAE: 76%
- Germany: 36%
- Sweden: 36%
- U.K.: 31%

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 9-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.
**TRUST IN INDUSTRIES, 2013 VS. 2014 - AUSTRALIA**

<table>
<thead>
<tr>
<th>Industry</th>
<th>2013</th>
<th>2014</th>
<th>2013 vs. 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>65%</td>
<td>77%</td>
<td>+12</td>
</tr>
<tr>
<td>Consumer Electronics</td>
<td>66%</td>
<td>75%</td>
<td>+9</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>58%</td>
<td>72%</td>
<td>+14</td>
</tr>
<tr>
<td>Brewing and Spirits</td>
<td>63%</td>
<td>71%</td>
<td>+8</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>58%</td>
<td>71%</td>
<td>+13</td>
</tr>
<tr>
<td>Entertainment</td>
<td>56%</td>
<td>70%</td>
<td>+14</td>
</tr>
<tr>
<td>Consumer Packaged Goods</td>
<td>56%</td>
<td>67%</td>
<td>+11</td>
</tr>
<tr>
<td>Automotive</td>
<td>55%</td>
<td>63%</td>
<td>+8</td>
</tr>
<tr>
<td>Consumer Health Companies</td>
<td>55%</td>
<td>55%</td>
<td>+0</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>43%</td>
<td>43%</td>
<td>+0</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>43%</td>
<td>58%</td>
<td>+15</td>
</tr>
<tr>
<td>Financial Services</td>
<td>40%</td>
<td>54%</td>
<td>+11</td>
</tr>
<tr>
<td>Banks</td>
<td>33%</td>
<td>53%</td>
<td>+13</td>
</tr>
<tr>
<td>Energy</td>
<td>42%</td>
<td>53%</td>
<td>+20</td>
</tr>
<tr>
<td>Chemicals</td>
<td>31%</td>
<td>49%</td>
<td>+7</td>
</tr>
<tr>
<td>Media</td>
<td></td>
<td>42%</td>
<td>+11</td>
</tr>
</tbody>
</table>
CHINA HIGHEST OF ENERGY TRUST IN ANY MARKET

TRUST IN INDUSTRIES, 2013 VS. 2014 - CHINA

2013

- TECHNOLOGY: 88%
- AUTOMOTIVE: 85%
- ENERGY: 84%
- CONSUMER PACKAGED GOODS: 82%
- BANKS: 80%
- TELECOMMUNICATIONS: 79%
- FINANCIAL SERVICES: 78%
- PHARMACEUTICALS: 75%
- CHEMICALS: 78%
- MEDIA: 76%
- BREWING AND SPIRITS: 73%
- CONSUMER HEALTH COMPANIES: 69%
- FOOD AND BEVERAGE: 71%
- ENTERTAINMENT: 73%

2014

- TECHNOLOGY: 93%
- AUTOMOTIVE: 89%
- ENERGY: 86%
- CONSUMER PACKAGED GOODS: 85%
- BANKS: 85%
- TELECOMMUNICATIONS: 82%
- FINANCIAL SERVICES: 82%
- PHARMACEUTICALS: 82%
- CHEMICALS: 80%
- MEDIA: 78%
- BREWING AND SPIRITS: 78%
- CONSUMER HEALTH COMPANIES: 77%
- FOOD AND BEVERAGE: 76%
- ENTERTAINMENT: 74%

2013 vs. 2014

- TECHNOLOGY: +5
- AUTOMOTIVE: +1
- ENERGY: +2
- CONSUMER PACKAGED GOODS: +3
- BANKS: +5
- TELECOMMUNICATIONS: +3
- FINANCIAL SERVICES: +4
- PHARMACEUTICALS: +7
- CHEMICALS: +2
- MEDIA: +2
- BREWING AND SPIRITS: +5
- CONSUMER HEALTH COMPANIES: +8
- FOOD AND BEVERAGE: +5
- ENTERTAINMENT: +1

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 9-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, 20-country global total.
<table>
<thead>
<tr>
<th>Industry</th>
<th>2013</th>
<th>2014</th>
<th>2013 vs. 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>83%</td>
<td>86%</td>
<td>+3</td>
</tr>
<tr>
<td>Consumer Electronics</td>
<td>78%</td>
<td>82%</td>
<td>+4</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>76%</td>
<td>80%</td>
<td>+4</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>81%</td>
<td>78%</td>
<td>-3</td>
</tr>
<tr>
<td>Automotive</td>
<td>75%</td>
<td>78%</td>
<td>+3</td>
</tr>
<tr>
<td>Consumer Packaged Goods</td>
<td>72%</td>
<td>78%</td>
<td>+6</td>
</tr>
<tr>
<td>Consumer Health Companies</td>
<td>72%</td>
<td>78%</td>
<td>+6</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>78%</td>
<td>77%</td>
<td>-1</td>
</tr>
<tr>
<td>Energy</td>
<td>72%</td>
<td>76%</td>
<td>+4</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>76%</td>
<td>75%</td>
<td>-1</td>
</tr>
<tr>
<td>Banks</td>
<td>72%</td>
<td>74%</td>
<td>+2</td>
</tr>
<tr>
<td>Chemicals</td>
<td>68%</td>
<td>74%</td>
<td>+6</td>
</tr>
<tr>
<td>Brewing and Spirits</td>
<td>74%</td>
<td>69%</td>
<td>-5</td>
</tr>
<tr>
<td>Financial Services</td>
<td>63%</td>
<td>68%</td>
<td>+5</td>
</tr>
<tr>
<td>Entertainment</td>
<td>69%</td>
<td>67%</td>
<td>-2</td>
</tr>
<tr>
<td>Media</td>
<td>67%</td>
<td>66%</td>
<td>-1</td>
</tr>
</tbody>
</table>
### HIGH IN INDONESIA AS WELL

**TRUST IN INDUSTRIES, 2013 VS. 2014 - INDONESIA**

<table>
<thead>
<tr>
<th>Industry</th>
<th>2013</th>
<th>2014</th>
<th>2013 vs. 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>TECHNOLOGY</td>
<td>94%</td>
<td>93%</td>
<td>-1</td>
</tr>
<tr>
<td>AUTOMOTIVE</td>
<td>93%</td>
<td>90%</td>
<td>-3</td>
</tr>
<tr>
<td>CONSUMER ELECTRONICS MANUFACTURING</td>
<td>92%</td>
<td>88%</td>
<td>-4</td>
</tr>
<tr>
<td>TELECOMMUNICATIONS</td>
<td>89%</td>
<td>88%</td>
<td>-1</td>
</tr>
<tr>
<td>BANKS</td>
<td>90%</td>
<td>87%</td>
<td>-3</td>
</tr>
<tr>
<td>PHARMACEUTICALS</td>
<td>87%</td>
<td>83%</td>
<td>-4</td>
</tr>
<tr>
<td>FOOD AND BEVERAGE</td>
<td>84%</td>
<td>80%</td>
<td>-4</td>
</tr>
<tr>
<td>ENERGY</td>
<td>84%</td>
<td>79%</td>
<td>-5</td>
</tr>
<tr>
<td>CONSUMER PACKAGED GOODS</td>
<td>80%</td>
<td>79%</td>
<td>-1</td>
</tr>
<tr>
<td>FINANCIAL SERVICES</td>
<td>84%</td>
<td>78%</td>
<td>-6</td>
</tr>
<tr>
<td>MEDIA</td>
<td>81%</td>
<td>78%</td>
<td>-3</td>
</tr>
<tr>
<td>ENTERTAINMENT</td>
<td>78%</td>
<td>77%</td>
<td>-1</td>
</tr>
<tr>
<td>CONSUMER HEALTH COMPANIES</td>
<td>76%</td>
<td>74%</td>
<td>-2</td>
</tr>
<tr>
<td>CHEMICALS</td>
<td>71%</td>
<td>74%</td>
<td>+3</td>
</tr>
<tr>
<td>BREWING AND SPIRITS</td>
<td>36%</td>
<td>43%</td>
<td>+7</td>
</tr>
</tbody>
</table>

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 9-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.
A deeper dive around Energy as an example of trust in Asia
TRUST IN ENERGY

2014 EDELMAN TRUST BAROMETER

The 2014 Edelman Trust Barometer is the firm’s 14th annual exploration of trust. We surveyed 33,000 people (27,000 General Public and 6,000 Informed Public respondents) in 27 markets around the world on their trust in institutions, credible sources/channels and specific issues and perceptions impacting trust in business and government. Figures in this map relate to General Publics. For the full energy trust report, visit www.edelman.com/energy-trust-2014
Q43-60. ENERGY Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-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 27-country global total and across 27 countries
THE REGULATORY ENVIRONMENT IS ONLY GOING TO GET TOUGHER FOR ENERGY

Not Enough Regulation of Business
Not Enough Regulation for Energy

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. Q263. When it comes to government regulation of the energy 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.
Your trust scores are generally linked to the desire for regulation in the energy sector. Trust in energy services is inversely related to the desire for more regulations in the energy industry. The chart shows the distribution of trust scores globally and by country. Trust in energy services is highest in the UAE at 60%, while the lowest is in Russia at 37%. The desire for more regulation is lowest in the UAE at 28% and highest in Russia at 64%. The graph indicates a clear correlation between trust and regulation desires across different countries.
THAT SAID, WITH THE EXCEPTION OF APAC COUNTRIES, POLICYMAKERS ARE NOT TRUSTED TO APPROPRIATELY REGULATE THE ENERGY INDUSTRY

PERCENTAGE AGREEING WITH EACH STATEMENT

I trust policymakers to develop and implement appropriate regulations on the energy industry.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage Agreeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>49%</td>
</tr>
<tr>
<td>UAE</td>
<td>84%</td>
</tr>
<tr>
<td>China</td>
<td>76%</td>
</tr>
<tr>
<td>India</td>
<td>73%</td>
</tr>
<tr>
<td>Singapore</td>
<td>73%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>72% 71%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>65%</td>
</tr>
<tr>
<td>Italy</td>
<td>63%</td>
</tr>
<tr>
<td>South Korea</td>
<td>60%</td>
</tr>
<tr>
<td>Brazil</td>
<td>48%</td>
</tr>
<tr>
<td>Australia</td>
<td>47%</td>
</tr>
<tr>
<td>Mexico</td>
<td>46%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>46%</td>
</tr>
<tr>
<td>Turkey</td>
<td>44%</td>
</tr>
<tr>
<td>Japan</td>
<td>43%</td>
</tr>
<tr>
<td>Canada</td>
<td>42%</td>
</tr>
<tr>
<td>South Africa</td>
<td>41%</td>
</tr>
<tr>
<td>Argentina</td>
<td>37%</td>
</tr>
<tr>
<td>US</td>
<td>36%</td>
</tr>
<tr>
<td>UK</td>
<td>34%</td>
</tr>
<tr>
<td>Sweden</td>
<td>33%</td>
</tr>
<tr>
<td>Germany</td>
<td>33%</td>
</tr>
<tr>
<td>France</td>
<td>32%</td>
</tr>
<tr>
<td>Spain</td>
<td>32%</td>
</tr>
<tr>
<td>Ireland</td>
<td>30%</td>
</tr>
<tr>
<td>Russia</td>
<td>29%</td>
</tr>
<tr>
<td>Poland</td>
<td>28%</td>
</tr>
</tbody>
</table>
AND MOST FEEL GOVERNMENT SHOULD CONSULT MULTIPLE STAKEHOLDERS WHEN DEVELOPING REGULATIONS—ENERGY HAS LICENSE TO ENGAGE

PERCENTAGE AGREEING WITH EACH STATEMENT

When policymakers are developing new regulations on businesses and industries, they should consult with multiple stakeholders (e.g., NGOs, academics, the affected businesses/industries, etc.) before making final decisions.
THERE IS AN OPPORTUNITY FOR THE ENERGY INDUSTRY TO PLAY A KEY ROLE IN ENERGY POLICY DEBATE

PERCENTAGE AGREEING WITH EACH STATEMENT

The energy industry should be a more active participant in the broader debate over [COUNTRY] energy policy.
TRUST IN ENERGY SECTORS

Renewables are the most trusted sector by some distance; Oil and Mining are the least trusted

56% RENEWABLES
70% ENERGY
58% NATURAL GAS
54% UTILITIES
50% OIL
50% MINING

The 2014 Edelman Trust Barometer is the firm’s 14th annual exploration of trust. We surveyed 33,000 people (27,000 General Public and 6,000 Informed Public respondents) in 27 markets around the world on their trust in institutions, credible sources/channels and specific issues and perceptions impacting trust in business and government. Figures in this graphic relate to General Publics. For the full energy trust report, visit www.edelman.com/energy-trust-2014
UNANIMOUS TRUST IN RENEWABLES

TRUST IN ENERGY SECTORS – RENEWABLES

2013

2014

Q61C-64C. [SPLIT SAMPLE] Now thinking about specific sectors within the energy industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. General Population, global total across 25 countries.
TRUST IN NATURAL GAS ABOVE 50 PERCENT IN 19 OF 27 MARKETS; GAINS IN A VARIETY OF MARKETS

TRUST IN ENERGY SECTORS – NATURAL GAS

- 2013
- 2014

Q61C-64C. [SPLIT SAMPLE] Now thinking about specific sectors within the energy industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. General Population, global total across 25 countries.
Q61C-64C. [SPLIT SAMPLE] Now thinking about specific sectors within the UTILITIES industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.

Population, global total across 25 countries.
COUNTRIES CLEARLY DIVIDED OVER TRUST IN THE OIL SECTOR; TRUST HIGHEST IN EMERGING AND ASIAN MARKETS

TRUST IN ENERGY SECTORS – OIL

- 2013
- 2014

Q61C-64C. [SPLIT SAMPLE] Now thinking about specific sectors within the energy industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. General Population, global total across 25 countries.
MINING IS MOST TRUSTED IN DEVELOPING NATIONS; CANADA, U.S. LEVELS MIGHT SURPRISE

TRUST IN ENERGY SECTORS – MINING

Q61C-64C. [SPLIT SAMPLE] Now thinking about specific sectors within the MINING industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. General Population, global total across 27 countries.
Trust, Leadership and Engagement
Q178-182. [TRACKING] When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-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, 27-country global total

Q183. On a typical day, what is the first source that you go to for general information about business? ; Q184. What is the first source you go to for breaking news about business? ; Q185. Which of the following sources do you turn to MOST often to confirm/ validate information on breaking news about business? Informed Publics, 27-country global total
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 9-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 27-country global total.
From 2009 to 2014, significant gains for regular employees, a person like yourself. CEOs flat from 2013.

Credibility of spokespeople

2009

2014

2009 vs. 2014

<table>
<thead>
<tr>
<th>Role</th>
<th>2009</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic or Expert</td>
<td>62%</td>
<td>67%</td>
<td>+5</td>
</tr>
<tr>
<td>Technical Expert*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A Person Like Yourself</td>
<td>47%</td>
<td>62%</td>
<td>+15</td>
</tr>
<tr>
<td>Financial or Industry Analyst</td>
<td>49%</td>
<td>53%</td>
<td>+4</td>
</tr>
<tr>
<td>NGO Representative</td>
<td>41%</td>
<td>52%</td>
<td>+9</td>
</tr>
<tr>
<td>Regular Employee</td>
<td>32%</td>
<td>52%</td>
<td>+20</td>
</tr>
<tr>
<td>CEO</td>
<td>31%</td>
<td>43%</td>
<td>+12</td>
</tr>
<tr>
<td>Government Official or Regulator</td>
<td>29%</td>
<td>36%</td>
<td>+7</td>
</tr>
</tbody>
</table>

* Not tested in 2009

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, 20-country global total.
Edelman Trust Barometer research reveals 16 specific attributes which build trust.

These can be grouped into five performance clusters listed here in rank order of importance.
IT TAKES A CHORUS TO GET YOUR STORY ACROSS
MOST TRUSTED INFLUENCER TO COMMUNICATE EACH TOPIC - INFLUENCER MESSAGE MAPPING

Q197-201(Global Summary). We would now like you to think about different types of information you may read, see or hear about a company. For each topic, please select which person you trust MOST to provide you with credible and honest information about a company. General Publics, 27-country global total.
WHATCEOS SHOULDDOTOBUILDTRUST
ACTIONS A CEO CAN TAKETO BUILD TRUST IN THEMSELVES AND THEIR COMPANY

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicates clearly and transparently</td>
<td>82%</td>
</tr>
<tr>
<td>Tells the truth, regardless of how complex or unpopular it is</td>
<td>81%</td>
</tr>
<tr>
<td>Engages with employees regularly to discuss the state of the business</td>
<td>80%</td>
</tr>
<tr>
<td>Is front and center during challenging times (product recalls, lawsuits, etc.)</td>
<td>79%</td>
</tr>
<tr>
<td>Is personally involved in supporting local charities and good causes</td>
<td>69%</td>
</tr>
<tr>
<td>Has an active media presence</td>
<td>53%</td>
</tr>
<tr>
<td>Positive Behaviors</td>
<td>Percentage</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------</td>
</tr>
<tr>
<td>ENSURES QUALITY CONTROL IN PRODUCTS</td>
<td>86%</td>
</tr>
<tr>
<td>PROTECTS CUSTOMER DATA</td>
<td>85%</td>
</tr>
<tr>
<td>RESPECTS EMPLOYEE RIGHTS</td>
<td>85%</td>
</tr>
<tr>
<td>RESPONSIBLE SUPPLY CHAIN MANAGEMENT</td>
<td>83%</td>
</tr>
<tr>
<td>PAYS APPROPRIATE LEVEL OF TAX</td>
<td>80%</td>
</tr>
</tbody>
</table>

**TURNING ATTRIBUTES INTO ACTION: TOP RANKED POSITIVE BEHAVIORS WILL IMPACT ENGAGEMENT CLUSTERS**

**THE LINK BETWEEN THE TOP FIVE POSITIVE EFFECTS ON TRUST AND TRUST CLUSTERS**

Q237-248. [SPLIT SAMPLE] How important are each of the following factors to building your trust in a company? Use a 9-point scale where one means that action is "not at all important to building your trust" and nine means it is "extremely important to building your trust" in a company. (Top 4 Box, Important in Building Trust) Informed Publics in 27-country global total.

**TURNING ATTRIBUTES INTO ACTION: TOP RANKED POSITIVE BEHAVIORS WILL IMPACT ENGAGEMENT CLUSTERS**

**THE LINK BETWEEN THE TOP FIVE POSITIVE EFFECTS ON TRUST AND TRUST CLUSTERS**

**If companies exhibit these positive behaviors...**

**...it will have its greatest impact in these clusters**

**ENGAGEMENT**

**INTEGRITY**

**PRODUCTS & SERVICES**

**PURPOSE**
NEGATIVE BEHAVIORS ARE MOST LIKELY TO AFFECT PERCEPTIONS OF HAVING AN ETHICAL BUSINESS PRACTICE
THE LINK BETWEEN THE TOP FIVE NEGATIVE EFFECTS ON TRUST AND TRUST ACTIONS

<table>
<thead>
<tr>
<th>Negative Behaviors</th>
<th>Impact on Trust Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unethical Business Practices</td>
<td>Engagement, Integrity</td>
</tr>
<tr>
<td>Fails to Keep Customer Information Secure</td>
<td>Integrity</td>
</tr>
<tr>
<td>Irresponsible During a Crisis</td>
<td>Integrity</td>
</tr>
<tr>
<td>Sub-Standard Work Conditions</td>
<td>Engagement, Integrity</td>
</tr>
<tr>
<td>Misrepresents the Company</td>
<td>Engagement, Integrity</td>
</tr>
</tbody>
</table>

Q226-236. [SPLIT SAMPLE] Please indicate whether each of the below actions would impact your trust in a company using a 9-point scale, where one means that action has "no impact on your trust in a company" and nine means it "has a significant negative impact on your trust in a company." You can use any number from one to nine, the higher the number the more that action would have a negative impact on your trust in a company. (Top 4 Box, Negative Impact on Trust) Informed Publics in 27-country global total.
Emerging opportunities for business and communications

New opportunities

Exciting changes for communications – international perspective, financing partnerships, better understanding of regional trends

New industries and new areas to drive debate, policy and be seen
- Agribusiness – world class and growing global need
- Gas and clean coal – access and technology catch up
- Tourism
- Education – STEM
- Wealth management – international

We have:
- Low sovereign risk
- Proximity to Asia
- Assets to develop

“Australian advantages meets global opportunities” – where they will intersect is the big question
Move from being consumed by channels and execution – outputs based – to broader business position

Regulatory, political and business environment presents opportunities

See the company’s role now and into the future

Play at a different level

Follow big trends, observe data and develop commercial feeling

PR + communication industry’s relevance based on advisory position not just execution.

There will always be requirement for communication tools, videos, community engagement.

Australia’s position presents real opportunity.
On the cover, from top left: Japanese Prime Minister Shinzo Abe: REUTERS/Toru Hanai; Malala Yousefzai: REUTERS/Darren Staples; Brazilian Oil and Gas Magnate Eike Batista: REUTERS/Fred Prouser; Anti-Government Protests in Turkey: REUTERS/Murad Sezer; Lord Justice Leveson, chair of The Leveson Inquiry: REUTERS/Stefan Wermuth; Hong Kong Protests in Favor of Edward Snowden: REUTERS/Bobby Yip; U.S. Government Shutdown: REUTERS/Mike Theiler