NEW DCN RESEARCH: TRUST AS A PROXY FOR BRAND VALUE

Understanding the Role of Trust in Digital Content Consumption, Engagement and Advertising

December 2017
Digital Content Next seeks to better understand the consumer mindset in regards to trust and premium content today. In particular, the research looks to uncover the role trust plays in driving consumption for premium digital publishers and how the trust a consumer places in a publisher impacts engagement and advertising effectiveness. DCN commissioned Frank N. Magid Associates, Inc. to conduct the research.

Objectives and Methodology:

Quantitative research methodology:

- U.S. online survey of 1,000 respondents with home internet connection, weekly or more engagements with social media and brand sites/apps of ages 18-64.
- Data was collected October 2017.
- Study averaged 19 minutes in length.
- A high-quality online research panel and data collection firm was used for recruitment and data collection.
- Response rates for content categories: National news, entertainment, sports, lifestyle, educational, business/finance, product reports/information.

This research specifically examined:

- What is the role of trust in driving consumption and value for publishers?
- What trust means for consumers in relationship to their digital content experience?
- If and how trust relationships differ for premium content, for social platforms (e.g., Facebook, Twitter, Instagram), Search Engines and YouTube?
- How does trust affect advertisers?
Research Committee:

David Iudica, VP Ad Sales Research, CNN
Daniel Rothman, Director of Insight, Financial Times
EXECUTIVE SUMMARY
Executive Summary

- The digital media landscape is rapidly changing due to steady emergence of new platforms, the growth of incumbents like Facebook, Google, Twitter and Snapchat, and the changing content strategies of all players. With consumers using social media as their digital gateway to information of all types -- Facebook’s newsfeed is the number one place users go to get digital content -- it’s essential to understand the value of trust in digital media and what publishers and advertisers need to build lasting consumer relationships built on trust.

- Interestingly, while consumers use social platforms as a primary access point for information, only 55 percent trust the information they find there. It appears that newsfeed automation and algorithms have a hand in the problem, promoting random content on social media and confusing readers as to what is credible or not.

- This has created a younger audience of “Social Skeptics,” seven in ten of whom choose quality brand sites for content and prefer brand sites/apps for information.

- Fake news and the spread of misinformation has also greatly impacted consumer trust in digital media. Eighty-two percent of consumers think there is a lot of fake news on social media and that perspective is trickling into brand sites. Therefore, brand sites must focus on four key areas to build trust: attribution (confirming multiple sources), reputation or authority, navigation/user experience, and prediction -- building a direct relationship with consumers that builds upon past experiences.

- Higher trust in brand sites results in a trust halo effect for advertisers which can be further leveraged when advertisers build emotional connections and identify with the style and tone of the brand site.

- Overall, consumer expectations around trust is higher for brand sites and apps which they expect to be trustworthy, credible, accurate, and up-to-date. Thus, brands should closely monitor trust and work to maintain it as a key differentiator in the volatile digital media marketplace.
KEY FINDINGS
Key Findings: Trust as a Proxy of Brand Value

1. Social Platforms transition to information gateways
   Facebook leads, followed by brand sites and YouTube. As the digital landscape continues to shift, Twitter, Instagram, Snapchat and other social players evolve as consumer access points for information.

2. Trust is an important differentiator for premium publishers
   Brand sites/apps (81% Top 2 box) are trusted more for their information (+20%) than social media, which positions them favorably against top competitor platforms.

3. “Fake News” is a real problem for all digital media especially social
   80%+ of consumers believe there is a lot of “fake news” on social media platforms. However, the problem extends to brand sites/apps with more than half (55%) saying there is a lot of fake news on premium sites/apps. Younger generations (Millennials/Xers) are more likely to believe there is a fake news problem.

4. A skeptical social mindset emerges
   89% of the market prefers content on brand sites/apps and believes there is too much low quality, non-credible content on social media. This mindset has led to an erosion of trust and represents an opportunity for premium brands to take advantage of this moment in time.
Consumer expectation is highest for brand sites/apps, which means brands have to work harder at building trust. In order to drive trust it is critical for premium brands to position their content as regularly updated, respected, and authentic in addition to the core positioning of high quality and trustworthy.

Being popular, going viral and sharing a POV all can work to build trust. Importantly, uniqueness is a hidden driver to trust. To help drive your positioning, uncover – and highlight – what’s unique about your brand and your content.

The three most important elements to develop a trusting relationship (Trust Model) with a brand site/app are centered around confirming stories with multiple sources (attribution), the authority (reputation) of the brand, ease of navigation and experience with the brand (prediction).

The two most critical elements to build a trust relationship with advertisers center on creating an emotional connection with the site/app (bonding) and the style and tone of the site/app (identification). Millennials find these elements significantly more important. This suggests that native advertising, both seamless and unobtrusive in nature, may be an effective approach for millennial-focused brands.
Key Findings: Trust as a Proxy of Brand Value

9 Advertisers get significant trust lift on brand sites/apps

Consumers trust advertisers on brand sites/apps (69%) significantly more (~+15%) compared to advertisers of on social media (54%) and YouTube (55%). Brand sites can further build advertiser trust by positioning themselves as credible, high quality, accurate and secure.

10 Trusted brands can fight ad blocking

Currently, almost half of consumers use ad blockers. Consumers are open to disabling ad blockers for trusted brand sites. In fact, 68% of those who use ad blockers today have disabled ad blocking when asked by a trusted brand site/app.
PART 1:
THE CONSUMER MINDSET
Total N=1000. Q1 Now, think about how you access information online or on mobile, which of the following do you use?

<table>
<thead>
<tr>
<th>Digital Sources Used to Access Information Online/Mobile</th>
<th>Total</th>
<th>Millennials 21-40</th>
<th>Gen Xers 41-52</th>
<th>Boomers 53-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook page/news feed</td>
<td>84%</td>
<td>82%</td>
<td>76%</td>
<td>84%</td>
</tr>
<tr>
<td>Brand's website on a computer</td>
<td>73%</td>
<td>80%</td>
<td>71%</td>
<td>74%</td>
</tr>
<tr>
<td>YouTube</td>
<td>65%</td>
<td>64%</td>
<td>60%</td>
<td>61%</td>
</tr>
<tr>
<td>Search engine like Google</td>
<td>61%</td>
<td>60%</td>
<td>65%</td>
<td>60%</td>
</tr>
<tr>
<td>Brand's website on mobile</td>
<td>72%</td>
<td>53%</td>
<td>45%</td>
<td>51%</td>
</tr>
<tr>
<td>Twitter page/news feed</td>
<td>48%</td>
<td>53%</td>
<td>29%</td>
<td>38%</td>
</tr>
<tr>
<td>Brand's mobile app</td>
<td>42%</td>
<td>37%</td>
<td>27%</td>
<td>31%</td>
</tr>
<tr>
<td>Instagram page/news feed</td>
<td>38%</td>
<td>31%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Snapchat Discover</td>
<td>19%</td>
<td>11%</td>
<td>6%</td>
<td>13%</td>
</tr>
<tr>
<td>Apple News</td>
<td>13%</td>
<td>18%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

SOCIAL PLATFORMS TRANSITION TO INFORMATION GATEWAYS (FACEBOOK LEADS), BRAND SITES/APPS STILL REMAIN CENTRAL
...Trust is an important differentiator for premium publishers
ALL AGES ARE SIGNIFICANTLY MORE LIKELY TO TRUST INFORMATION ON BRAND SITE/APP THAN YOUTUBE AND SOCIAL MEDIA

Trust in Information on the Following Digital Information Sources

(Top 2 – 4+5)

<table>
<thead>
<tr>
<th>Source</th>
<th>Total</th>
<th>Millennials 21-40</th>
<th>Gen Xers 41-52</th>
<th>Boomers 53-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand’s Site / App</td>
<td>81%</td>
<td>83%</td>
<td>81%</td>
<td>75%</td>
</tr>
<tr>
<td>YouTube</td>
<td>60%</td>
<td>64%</td>
<td>56%</td>
<td>48%</td>
</tr>
<tr>
<td>Social Media</td>
<td>55%</td>
<td>60%</td>
<td>48%</td>
<td>45%</td>
</tr>
</tbody>
</table>
89% of consumers agree with at least one of the following statements:

**AGREE STATEMENTS (TOP TWO BOX)**

- I choose my online and mobile sources for content based mostly on quality brand websites/apps: 71%
- I prefer the overall experience on individual brand websites/apps over social media pages/news feeds: 70%
- There's so much random content on social media, there's no way to tell if an article is credible or not: 62%

Total N=1000. Q14 How much do you agree or disagree with the following statements regarding your use of [insert content type in Q2A] information online or on mobile.
Premium Preferred, Social Skeptic Mindset Surfaces: WHO ARE THEY?

• 61% are under 40

• 44% currently pay for a subscription to a brand site/app

• 71% visit brand sites/apps often in an average week

• 68% purchased a product based on an ad they saw online in the last 30 days

89% of 18-64 year-olds fit this description – PREMIUM PREFERRED, SOCIAL SKEPTIC
Lack of trust, while concentrated on social media, is trickling into brand sites
8 IN 10 AGREE – “A LOT OF FAKE NEWS ON SOCIAL MEDIA”; BRAND SITE AND APPS AFFECTED, BUT TO A SIGNIFICANTLY LESSER EXTENT

Agreement that There is a lot of Fake News on...
(Top 2 – 4+5)

- ...Brand Sites / Apps
- ...Social Media Platforms

Total
55%
82%

Millennials 21-40
56%
84%

Gen Xers 41-52
58%
77%

Boomers 53-64
47%
79%

Total N=1000. Q16.1 Please indicate how much you agree with the following statement. There is a lot of fake news on brand websites/apps (e.g. CNN, Sports Illustrated, People, Refinery29 etc.). Q16.2 Please indicate how much you agree with the following statement. There is a lot of fake news on social media platforms like Facebook and Twitter, etc..
**FALSE STORIES ON A BRAND SITE/APP WILL BREAK TRUST OF MORE THAN HALF OF CONSUMERS**

**Top Reasons to Break Trust in a Brand Site/App**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>If a story turns out to be false</td>
<td>55%</td>
</tr>
<tr>
<td>If a headline is misleading</td>
<td>30%</td>
</tr>
<tr>
<td>If a story is opinionated but claims to be objective</td>
<td>16%</td>
</tr>
<tr>
<td>If a brand website or app asks you to subscribe to get the content</td>
<td>15%</td>
</tr>
<tr>
<td>If a brand website or app serves up too many ads while you are reading or viewing a story</td>
<td>14%</td>
</tr>
<tr>
<td>If a story promises new information but does not deliver</td>
<td>12%</td>
</tr>
<tr>
<td>If a person associated with the brand has a scandal</td>
<td>12%</td>
</tr>
<tr>
<td>If a story is sensational</td>
<td>11%</td>
</tr>
<tr>
<td>If the story is a teaser to tune into TV to get the information</td>
<td>9%</td>
</tr>
<tr>
<td>If a brand website or app asks you to share the story on social media</td>
<td>7%</td>
</tr>
<tr>
<td>If a story you are not interested in shows up as a mobile notification</td>
<td>6%</td>
</tr>
</tbody>
</table>
THESE FOUR THINGS BREAK TRUST 81% OF TIME

Too many ads could be breaking trust with your users

Adding responses expands reach (additive)

<table>
<thead>
<tr>
<th>Reasons to Break Trust</th>
<th>If a story turns out to be false</th>
<th>If a headline is misleading</th>
<th>If a brand serves up too many ads while reading/viewing a story</th>
<th>If a story is sensational</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total reach %</td>
<td>55%</td>
<td>67% (+12%)</td>
<td>75% (+8%)</td>
<td>81% (+6%)</td>
</tr>
</tbody>
</table>

Total N=1000. Q15 What factors/reasons are most likely to break your TRUST in a brand website/app? Select up to two.

TURF (“Total Unduplicated Reach and Frequency”) Identifies best mix of fewest options that will represent the greatest number of consumers in terms of unduplicated answers: Unduplicated – Each feature in the optimal mix will appeal to a unique subset of consumers.
A BRAND SITE/APP HELD TO HIGHER EXPECTATIONS MUST BE TRUSTWORTHY, CREDIBLE, ACCURATE and CURRENT

<table>
<thead>
<tr>
<th>Tier 1: 90%-95% Attribute importance (4+5)</th>
<th>Brand Site/App</th>
<th>Social Media</th>
<th>Search Engines</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustworthy Credible Accuracy Up-to-date High quality Current</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tier 2: 85%-90% Attribute importance (4+5)</th>
<th>Brand Site/App</th>
<th>Social Media</th>
<th>Search Engines</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentic Respected Expertise</td>
<td>Trustworthy Accuracy Credible Current Up-to-date High quality</td>
<td>Accuracy Current Credible Up-to-date Trustworthy High quality Easy-to-use Authentic</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tier 3: 80%-85% Attribute importance (4+5)</th>
<th>Brand Site/App</th>
<th>Social Media</th>
<th>Search Engines</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-depth Easy-to-use Security</td>
<td>Authentic Easy-to-use Respected Expertise</td>
<td>Expertise Respected In-depth</td>
<td>Up-to-date Credible Accuracy Trustworthy Current High quality</td>
<td></td>
</tr>
</tbody>
</table>
THE CONSUMER MINDSET - KEY TAKEAWAYS:

1. **Social Platforms transition to information gateways.** Facebook leads, followed by brand sites and YouTube. As new social platforms crowd the space, Facebook shows signs of aging out with 94% of Boomers using as a digital access point compared to Gen-Xers (84%) and Millennials (82%).

2. **Trust is a key differentiator for brand sites/apps.** Brand sites/apps (81% top 2 box) are trusted more for their information (+20%) than social media, which positions them favorably against top competitor platforms. Brand sites are held to a higher standard.

3. **Make no mistake, there is a fake news problem. It’s a likely disruptor social media’s standing in the consumer mindset.** 80%+ of consumers believe there is a lot of “fake news” on social media platforms. The problem also affects brand sites/apps to a lesser extent with more than half (55%) saying there is a lot of fake news on premium sites/apps. Younger generations (Millennials/Xers) are more likely to believe there is a fake news problem.
The Consumer Mindset - Key Takeaways:

**4. The fake news problem is exacerbated by misleading headlines and, of course, if a story is false.** However, it is not just about a story turning out to be false. Trust is harmed by misleading headlines and if a website serves up too many ads on a story.

**5. A social media skeptic mindset has emerged.** 89% of consumers prefer content on brand sites/apps and/or believe there is too much low quality, non-credible content on social media. This mindset has led to an erosion of trust and represents an opportunity for premium brands to take advantage of this moment in time.

**6. Consumer expectations around trust is higher for brand sites/apps.** Being trustworthy, credible, accurate, up-to-date, high quality and current are all essential for premium brands. The bar is much higher for brand sites/apps. Social media has a lower threshold and YouTube has the lowest threshold for the same content.
PART 2: TRUST DRIVERS FOR PREMIUM CONTENT
OK, CLEARLY TRUST MATTERS....

But what drives “trust”? 
Digital Content Next Asked: How does consumers’ trust of sources impact engagement with brands associated with specific types of content?

Advanced Analytics Approach
Derived importance analytics were conducted to identify unmet customer needs, and to uncover opportunities for focus moving forward in comparing drivers of higher trust ratings.

**Derived Importance: Explanation**

- **Hidden Driver**: Strong driver, Low importance
- **Vital Needs**: Strong driver, Strong importance
- **Limited Impact**: Weak driver, Weak importance
- **Necessary Needs**: Weak driver, Strong importance
HOW TO READ STATED AND DERIVED CHARTS

**Derived Importance**

- **Hidden Driver**
  - High derived importance
  - Low stated importance

- **Limited Impact**
  - Low derived importance
  - Low stated importance

- **Vital**
  - High derived importance
  - High stated importance

- **Necessary Needs**
  - Low derived importance
  - High stated importance
Total N=1000. Q4 When it comes to choosing a brand’s website/app to get information on [insert content type in Q2A] how important are each of the following?  Q7 Please rate how much you TRUST [insert content type in Q2A] the information on the following?
VITAL DRIVERS TO TRUST
TRUSTWORTHY
UP-TO-DATE
HIGH QUALITY
CURRENT
RESPECTED
AUTHENTIC
EXPERTISE
IN-DEPTH
EASY TO USE

HIDDEN DRIVERS TO TRUST
POPULAR
PERSPECTIVE/POV
VIRAL
ENTERTEAINING
EDITORIAL
PERSONALIZED
UNIQUE
**MILLENNIALS: POPULAR, OBJECTIVE, TRANSPARENCY ARE HIDDEN DRIVERS**

**Derived Importance**
- Popular
- Transparency
- Objective

**Limited Impact**
- Opinionated
- Provocative
- Viral
- Used by my friends and family
- Unique
- Concise
- Visual appealing
- Privacy
- Personalized
- Represents me
- Heritage
- Security
- High quality
- Credible
- Accuracy
- Security

**Stated Importance**
- Expertise
- Has a perspective or has a point of view
- Has a perspective or has a point of view
- Editorial
- Has a perspective or has a point of view

**Vital**
- Up to date
- Current
- In-depth
- Trustworthy
- Authentic
- Easy to use

**Respected**
- Editorial
- Has a perspective or has a point of view

**Necessary Needs**
- Respected
- Heritage
- Respected
- Respected
- Limited

---

Total N=1000. Q4 When it comes to choosing a brand’s website/app to get information on [insert content type in Q2A] how important are each of the following? Q7 Please rate how much you TRUST [insert content type in Q2A] the information on the following?
KEY DRIVERS TO TRUST BY VERTICAL

- UP-TO-DATE
- IN-DEPTH
- EASY TO USE
- RESPECTED
- CREDIBLE

- POPULAR
- PERSPECTIVE/POV
- VIRAL
- PROVOCATIVE
- ENTERTAINING

- ENTERTAINING
- TRUSTWORTHY
- CREDIBLE
- UP-TO-DATE
- AUTHENTIC

- EDITORIAL
- PERSONALIZED
- VISUALLY APPEALING
- PERSPECTIVE/POV
- ENTERTAINING
KEY DRIVERS TO TRUST BY VERTICAL

- RESPECTED
- IN-DEPTH
- EDITORIAL
- ENTERTAINING
- POPULAR

- RESPECTED
- CREDIBLE
- HIGH QUALITY
- TRANSPARENCY
- CURRENT

- VIRAL
- POPULAR
- UNIQUE
- UP-TO-DATE
- OPINIONATED

ITEM IS COLORED IF IT’S A VITAL OR HIDDEN TRUST DRIVER
WHAT DOES TRUST MEAN FOR THE CONSUMER?
(THEMES BASED ON VERBATIMS)

1. VERIFIED: Doing the legwork to verify stories based on multiple, legitimate sources.
2. FACTUAL: Content is based on accurate, objective information.
3. RELIABLE: A source that is professional and dependable for the above needs. Could mean a track record or historical excellence.
4. SECURITY: An emerging need for the publisher to make sure users’ personal information is not compromised. In some cases this could mean too many ads and/or clickbait.
### WHAT TRUST MEANS FOR CONSUMERS OF DIGITAL CONTENT

These are verbatims when asked “What does trust mean for you when getting information online or on mobile?”

<table>
<thead>
<tr>
<th>Verified</th>
<th>Factual</th>
<th>Reliable</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>“The information provided must be transparent with the consumer and have valid studies to back up their claims and theories.”</td>
<td>“A non-biased source that allows me to develop my own opinion on certain events.”</td>
<td>“Having reliable information that is vetted.”</td>
<td>“The information I’ve received or accessed and any info I input will be kept confidential.”</td>
</tr>
<tr>
<td>“I also want unbiased information, so I don’t feel like I’m watching or reading sponsored information.”</td>
<td>“I need to know that the information is factually accurate and is not made up or based on unreliable sources.”</td>
<td>“It means that I have to look at the source and it has to be a reputable source that I know and have researched.”</td>
<td></td>
</tr>
<tr>
<td>“I don’t want hearsay or speculation. I want the real story from verified sources.”</td>
<td>“Reliable information that has fact based reporting reviewed by experts prior to publication.”</td>
<td>“I have to believe that the network isn’t producing falsehoods, or spreading propaganda.”</td>
<td></td>
</tr>
<tr>
<td></td>
<td>“Accurate, objective information without any bias, fluff, or agenda.”</td>
<td>“Something reliable and dependable.”</td>
<td></td>
</tr>
</tbody>
</table>

Total N=1000. Q3.1 Now, we would like you to think about the relationship between trust and the brands you use to access digital content. What does trust mean for you when getting [insert content type in Q2A] information online or on mobile?
RELIABLE AND ACCURATE ARE THE TOP OF MIND WORDS FOR TRUSTED DIGITAL INFORMATION

Total N=1000. Q3.2 Again, we would like you to think about the relationship between trust and the brands you use to access digital content. What words come to mind when you think about trusted information online or on mobile?
TRUST DRIVERS - KEY TAKEAWAYS:

1. **Brand sites/apps must work harder at building trust by focusing on what’s vital to consumers.** To drive trust, it is critical for premium brand sites/apps to position their content as regularly updated, respected, and authentic in addition to the core positioning of high quality and trustworthy. Depending on the content vertical, news, entertainment, sports, lifestyle, etc., core attributes may require a different focus.

2. **Hidden drivers correlate strongly to trust, go beyond “the facts” to drive trust.** Being popular, going viral and sharing a POV can all work to build trust. Uniqueness is also a factor that can drive trust. Avoid “this brand represents me” positioning. That’s the clear sign of inauthenticity.

3. **Millennials have unique trust drivers that matter.** Millennials have some unique and hidden trust drivers including transparency, objectivity and entertaining. Content can be entertaining and trusted for Millennials – just look at the rise of John Oliver’s Last Week Tonight.

4. **Consumer verbatims also identify necessary and vital drivers.** Even when asked to elaborate on what they saw as the relationship between trust and the digital information they access, respondents repeated what the numbers say – verified, reliable, and factual content needs to be prioritized.
PART 3:
THE TRUST MODEL: BUILDING A TRUSTED RELATIONSHIP WITH BRAND SITES AND ADVERTISERS
Key components for a strong trust relationship between brand sites/apps and consumers
Consumers were asked how important each component of the Trust Model is to the development of a trusted relationship with a brand site/app and its content.

<table>
<thead>
<tr>
<th>Trust Model</th>
<th>How Trust is Developed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prediction</td>
<td>Prior experience with source</td>
</tr>
<tr>
<td>Attribution</td>
<td>Confirmation with multiple sources</td>
</tr>
<tr>
<td>Bonding</td>
<td>Evocation of emotional response</td>
</tr>
<tr>
<td>Reputation</td>
<td>Authority, certification, reviews, references</td>
</tr>
<tr>
<td>Identification</td>
<td>Resonance with style, arguments, objectives</td>
</tr>
<tr>
<td>Navigation</td>
<td>Usability, site design, etc.</td>
</tr>
</tbody>
</table>

FOUR COMPONENTS BUILD 76% OF THE TRUST RELATIONSHIP

<table>
<thead>
<tr>
<th>Aspects Important to Trust</th>
<th>Attribution (confirming multiple sources)</th>
<th>Reputation (brand authority)</th>
<th>Navigation (ease site navigation)</th>
<th>Prediction (past experience with brand)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total reach %</td>
<td>57%</td>
<td>66% (+9%)</td>
<td>72% (+6%)</td>
<td>76% (+4%)</td>
</tr>
</tbody>
</table>

Adding responses expands trust reach

TURF ("Total Unduplicated Reach and Frequency")
Identifies best mix of fewest options that will represent the greatest number of consumers in terms of *unduplicated* answers: *Unduplicated* – Each feature in the optimal mix will appeal to a unique subset of consumers
Consumers were asked how important each component of the Trust Model is to the development of a trusted relationship with a brand site/app and the advertisers seen on a brand site/app.

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<tr>
<td>Navigation</td>
<td>Usability, site design, etc.</td>
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</tbody>
</table>

TWO ATTRIBUTES MOST HIGHLY CORRELATED TO IMPORTANCE AND TRUST FOR ADVERTISERS ON BRAND SITES/APPS

1. BONDING
   (EMOTIONAL CONNECTION WITH A SITE/APP)

2. IDENTIFICATION
   (STYLE AND TONE OF A SITE/APP)

Total N=1000. Q10.1 How important is your emotional connection with a brand's website/app in order to TRUST the advertisers you see on a brand's website/app? Q12.1 How important is the style and tone of a brand's website/app in order to TRUST the advertisers you see on a brand's website/app? Q7.1 Please rate how much you TRUST the advertisers you see on the following? These are derived drivers
**BONDING: EMOTIONAL CONNECTION MOST IMPORTANT FOR MILLENNIALS TO TRUST ADVERTISERS ON THE SITE**

Importance of the *Emotional Connection* with a Brand Site/App In Order To Trust the Advertisers You See On a Brand Site/App

- **Total**: 6% (1 - Not at all important) 10% (2) 26% (3) 32% (4) 26% (5 - Very important)
- **Millennials 21-40**: 5% (1) 8% (2) 25% (3) 34% (4) 28% (5 - Very important)
- **Gen Xers 41-52**: 7% (1) 7% (2) 30% (3) 33% (4) 24% (5)
- ** Boomers 53-64**: 7% (1) 17% (2) 30% (3) 25% (4) 21% (5 - Very important)

Total N=1000. Q10.1 How important is your emotional connection with a brand’s website/app in order to trust the advertisers you see on a brand’s website/app?
### Importance of the Style and Tone of a Brand Site/App In Order To Trust the Advertisers You See On a Brand Site/App

<table>
<thead>
<tr>
<th>Age Group</th>
<th>1 - Not at all important</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>7%</td>
<td>25%</td>
<td>39%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Plurals 18-20</td>
<td>10%</td>
<td>19%</td>
<td>31%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Millennials 21-40</td>
<td>6%</td>
<td>23%</td>
<td>41%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Gen Xers 41-52</td>
<td>7%</td>
<td>26%</td>
<td>39%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Boomers 53-64</td>
<td>10%</td>
<td>31%</td>
<td>33%</td>
<td>19%</td>
<td></td>
</tr>
</tbody>
</table>

Total N=1000. Q12.1 How important is the style and tone of a brand’s website/app in order to TRUST the advertisers you see on a brand’s website/app?
THE ROLE OF TRUST - KEY TAKEAWAYS:

1. **Attribution, reputation, navigation and prediction are four key elements in building a trusted relationship.** Building off Kelton et al’s research, the four most critical components to drive trust are: confirming stories with multiple sources (attribution), the authority (reputation) of the brand, navigation ease, and past experience with the brand (predication).

2. **Bonding and Identification are key to driving trusted relationship with advertisers.** The two most critical elements in building a trust relationship with advertisers are centered on the emotional connection (bonding) and the style and tone of the site/app (identification).

3. **Trust model for advertising is most significant for Millennials.** Millennials tell us bonding and identification connections with the site/app are significantly more important to developing trust for advertisers than other generations, especially Boomers. This suggests that native advertising, both seamless and unobtrusive in nature, may be an effective approach for Millennial-focused brands.
PART 4:
ADVERTISING, PREMIUM CONTENT AND TRUST
TRUST OF A BRAND SITE/APP POSITIVELY IMPACTS PERCEPTION OF ADVERTISERS

How Trust in a Brand Site/App Impacts Perception of the Advertiser

- Positively impacts my perception of the advertiser: 59%
- Has no impact on my perception of the advertiser: 37%
- Negatively impacts my perception of the advertiser: 56%
- Don't know: 42%

Total N=1000. Q7.2 If you see an advertisement on a brand’s website/app you TRUST, how does that impact how you perceive the advertiser?
HIGHER TRUST OF DIGITAL CONTENT LEADS TO TRUST HALO EFFECT FOR ADVERTISERS

Trust in Information and Advertisers on the Following Digital Information Sources

(Top 2 – 4+5)

<table>
<thead>
<tr>
<th>Information Sources</th>
<th>Trust in Information</th>
<th>Trust in Advertisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand's Site / App</td>
<td>81%</td>
<td>69%</td>
</tr>
<tr>
<td>Search Engines</td>
<td>80%</td>
<td>67%</td>
</tr>
<tr>
<td>YouTube</td>
<td>60%</td>
<td>55%</td>
</tr>
<tr>
<td>Social Media</td>
<td>55%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Premium Publishers are often high in search results, possibly driving high trust rating.
TRUSTWORTHY, CREDIBLE AND ACCURATE CONTENT IS VITAL FOR TRUSTING **ADVERTISERS** ON A BRAND SITE/APPL

Total N=1000. Q5.4 Now, we would like you to think about the advertisements you may see when getting digital news and information. Which of the following attributes of a brand website/app makes you most likely to TRUST the advertisers on the website/app? Select up to five.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustworthy</td>
<td>49%</td>
</tr>
<tr>
<td>Credible</td>
<td>43%</td>
</tr>
<tr>
<td>Accuracy</td>
<td>35%</td>
</tr>
<tr>
<td>High quality</td>
<td>27%</td>
</tr>
<tr>
<td>Up-to-date</td>
<td>23%</td>
</tr>
<tr>
<td>Respected</td>
<td>21%</td>
</tr>
<tr>
<td>Authentic</td>
<td>21%</td>
</tr>
<tr>
<td>Current</td>
<td>19%</td>
</tr>
<tr>
<td>Security</td>
<td>18%</td>
</tr>
<tr>
<td>Expertise</td>
<td>17%</td>
</tr>
<tr>
<td>Objective</td>
<td>16%</td>
</tr>
<tr>
<td>Transparency</td>
<td>16%</td>
</tr>
<tr>
<td>Easy-to-use</td>
<td>15%</td>
</tr>
<tr>
<td>Privacy</td>
<td>13%</td>
</tr>
<tr>
<td>Entertaining</td>
<td>13%</td>
</tr>
<tr>
<td>In-depth</td>
<td>13%</td>
</tr>
<tr>
<td>Concise</td>
<td>10%</td>
</tr>
</tbody>
</table>
FIVE ATTRIBUTES DRIVE 83% OF TRUST HALO EFFECT FOR ADVERTISERS

<table>
<thead>
<tr>
<th>Aspects Important to Trust</th>
<th>Trustworthy</th>
<th>Credible</th>
<th>High Quality</th>
<th>Accuracy</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total reach %</td>
<td>49%</td>
<td>65% (+16%)</td>
<td>74% (+9%)</td>
<td>79% (+5%)</td>
<td>83% (+4%)</td>
</tr>
</tbody>
</table>

Adding responses expands trust reach

TURF ("Total Unduplicated Reach and Frequency")
Identifies best mix of fewest options that will represent the greatest number of consumers in terms of unduplicated answers:
Unduplicated – Each feature in the optimal mix will appeal to a unique subset of consumers
A MAJORITY OF CONSUMERS HAVE OR WOULD DISABLE AN AD BLOCKER IF A TRUSTED BRAND SITE/APP ASKED

Ad Blocker Usage on Sites/Apps

- 68% of those currently using ad blockers have disabled an ad blocker when asked by a trusted brand site/app (74% for Millennials)
- 60% of those not currently using ad blockers would disable an ad blocker if a trusted brand site/app asked them to

Total N=1000. Q17 Do you currently use ad blockers on websites or apps? Q17.1 Have you disabled an ad-blocker when asked by a brand website/app you trust? Q17.2 Would you disable an ad-blocker if asked by a brand website/app you trust?
THE ROLE OF TRUST - KEY TAKEAWAYS:

1. Advertisers see significant boost for trust on brand sites/apps over social media and YouTube. Consumers trust advertisers (81% Top 2 box) on sites/apps significantly more (~+15%) compared to advertisers on social media and YouTube.

2. Brands can further drive trust by positioning their advertising around credible, high quality, accurate and secure content. These are similar attributes as seen earlier in the content positioning, but security matters more when advertisers are added to the equation.

3. Most will disable ad blockers for trusted brands. Consumers are open to disabling ad blockers for trusted brands. In fact, 68% of those who use ad blockers today have disabled ad blocking when asked by a trusted brand.
FINAL THOUGHTS: INSIGHTS AND RECOMMENDATIONS
Recommendations for DCN Premium Publishers

1. **Social Platforms transition to information gateways**
   **RECOMMENDATION:** Supervise distributed content relationships closely. Include strong branding and messaging elements for clear recognition of consumer value.

2. **Trust is an important differentiator for premium publishers**
   **RECOMMENDATION:** Brands should measure trust internally and monitor closely. How trust goes, so goes every aspect of the brand.

3. **Fake news and distracting settings are significant problems in the digital landscape.**
   **RECOMMENDATION:** Trust is also broken by misleading headlines and serving up too many ads. Premium publishers can turn these pain points into potential opportunities by directly marketing premium publishers as a destination to avoid these annoyances.

4. **A social media skeptic mindset has emerged.**
   **RECOMMENDATION:** Target this consumer mindset and continue to provide strong branding of distributed content to message users the direct trust benefit of a premium content.
Recommendations for DCN Premium Publishers

4. Social media has a trust problem.
   **RECOMMENDATION:** Understand that social media could be harming long-term brand trust and reputation. Be mindful of your content on social media. Finds ways to own your relationship with the consumer. It directly impacts your brand health, acquisition, and retention.

5. Brands must build upon the vital drivers of trust
   **RECOMMENDATION:** To drive trust, premium brands’ content must be seen as in-depth, respected, expert and authentic. These are the definitions of trust that move the needle. Build them into every aspect of your products.

6. Hidden drivers like being viral and unique increase trust but be equally careful to avoid the traps.
   **RECOMMENDATION:** Being popular, going viral and sharing a POV can all work to build trust. However, remember that uniqueness is a hidden driver to trust. Ask what’s unique about your brand, your content – this should help drive your positioning.

**RECOMMENDATION:** Millennials have a few unique hidden trust drivers including transparency, objectivity and entertaining. It’s important to strike the right balance of tone and style that’s also authentic. Millennials are less trusting of brands when compared to Boomers but trust and loyalty can certainly be won. Stories built on objective facts, displaying transparency and told in an entertaining and/or authentic manner appeal to Millennials.

8. Attribution, reputation, navigation and prediction build strong trust relationship.

**RECOMMENDATION:** Attribution – confirming with multiple sources – is something every brand should do, as well as market and position around it. It’s is a signal of trust in every story. Reputation is about being an authority in a vertical, navigation is about ease and prediction is about prior experience. Reputation and prediction are both built through direct relationships with the consumer. Having a site/app with best-in-class navigation breeds trust and is a tangible factor that can happen immediately at the consumer point of entry.
Recommendations for DCN Premium Publishers

   **RECOMMENDATION:** When it comes to trusting advertisers, emotional connection with the site/app (bonding) and the style and tone of the site/app (identification) win. Identifying advertisers that are a good fit emotionally and tonally makes intuitive sense and drives value for consumers.

10. Millennials find bonding and identification significantly more important to building trust in an advertiser.
    **RECOMMENDATION:** The emotional connection and style and tone of an app must resonate in order for Millennials to trust the advertisers. This suggests that native advertising, both seamless and unobtrusive in nature, may be an effective approach for Millennial-focused brands.

11. Premium brand sites/apps drive extraordinary value for advertisers.
    **RECOMMENDATION:** Consumers trust advertisers on sites/apps significantly more (~+15%) compared to advertisers of similar content areas on social media and YouTube. Ad blocking is a major issue and one that trusted brands can circumvent with loyal users.
THANK YOU

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