

Net Trust Score (NTS)

Sport – Executive Summary Report

30 May 2018



Executive Summary

“Always look on the bright side of life,” sang Monty Python, but when it comes to national and global brands, that may have been bad advice. Encouraging us to ‘look for the silver lining’ or ‘focus on the positive’ may have taken us down a yellow brick road of delusion.

Trust is the foundation of all human connections – from intimate relationships to everyday business transactions. But it’s Distrust where our deepest fears, pain and betrayal surface: the shock of discovering we were foolish to trust too much.

Trust = game on

Distrust = game over

Why does this matter?

- Distrust triggers sport-supporter churn
- Distrust kills audience engagement
- Distrust is the tipping point for reputational damage
- Distrust kills sponsor potential
- Distrust is the bellwether for an unsustainable future

This summary shows that any measurement of trust is only truthful when distrust is simultaneously measured and one is subtracted from the other to reveal the real picture – a brand’s Net Trust Score.

But first, a quick description of our methodology.

Methodology

We have asked approximately 4,000 Australians which BRANDS they TRUST and which they DISTRUST. The questions in these surveys are unprompted and context-free. Respondents are recruited from the Roy Morgan Single Source database.

To date we have conducted 4 rounds of interviews:

- October 2017
- January 2018
- February 2018
- April 2018

Each round was conducted and analysed separately. We then aggregated the results from the first two rounds into one baseline against which future rounds are compared as they’re tracked over time.

In April we surveyed an additional 1,111 Australians to identify which **SPORTS** they **TRUST** and which they **DISTRUST**, and **60 sports** were nominated.

We subtract the distrust score of each nominated sport from its trust score. The result is a Net Trust Score or NTS.

Every respondent is also asked *WHY* they trust or distrust their nominated sports.

Net Trust Score – General Industry Categories

Limiting the measurement of overall brand performance by asking only if a customer has had a positive experience with a brand, or if someone would recommend a brand to their family or friends (i.e. a positive action) skews the outcome. This can be compared to looking only at one side of a coin and ignoring the opposite face.

While traditional measures such as NPS or customer satisfaction are valid, tried and tested measures, they have one fundamental flaw; they only score on a scale of positive sentiment; they only reveal one side of the coin. Positive sentiment is the degree to which consumers feel a brand meets / delivers a positive experience or image. What these measures fail to recognise is that the other side of the coin, the scale of negative sentiment, is more important in understanding brand performance and its drivers of success. But, until now, it has been ignored.

The true measure of a brand is revealed when we subtract its distrust score from its trust score – providing a brand's Net trust Score or NTS. Only four industry categories enjoy a positive Net Trust Score (NTS):

1. Retail
2. Travel
3. Charities
4. Medical

The full report for your sport

The full **Sport Net Trust Score Report** is now available.

This report is customised to your sport and will provide a comprehensive analysis of your sport's baseline trust position, revealing how many Australians TRUST and DISTRUST it, its key 'competitors', key sponsors and key media partners – reported by:

- National Net Trust Scores (NTS) and rankings
- NTS scores and rankings by State
- NTS scores and rankings by Gender
- NTS scores and rankings by Generation
- Your NTS compared to the highest and lowest brands (all brands)
- Your NTS compared to the highest and lowest sporting brands
- The Drivers of TRUST and DISTRUST – why do Australian's feel the way they do about your sport? And your competitors?

This report is available for \$35,000. Please contact us to secure your report, contact 1800 633 813 or email askroymorgan@roymorgan.com.