



Edelman Trust Barometer 2021

CAUTION: DATA NOT FACT-CHECKED, DO NOT DISTRIBUTE
UNDER EMBARGO UNTIL JANUARY 13, 2021

NARRATIVE

FOR SARAH/TONIA/DAVID

REQUEST DONE

21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 markets

33,000+ respondents total

All fieldwork was conducted between
October 19 and November 18, 2020

27-market global data margin of error: General population +/- 0.6% (N=31,050), informed public +/- 1.2% (N=5,000), mass population +/- 0.6% (26,050+), half-sample global general online population +/- 0.8% (N=15,525).

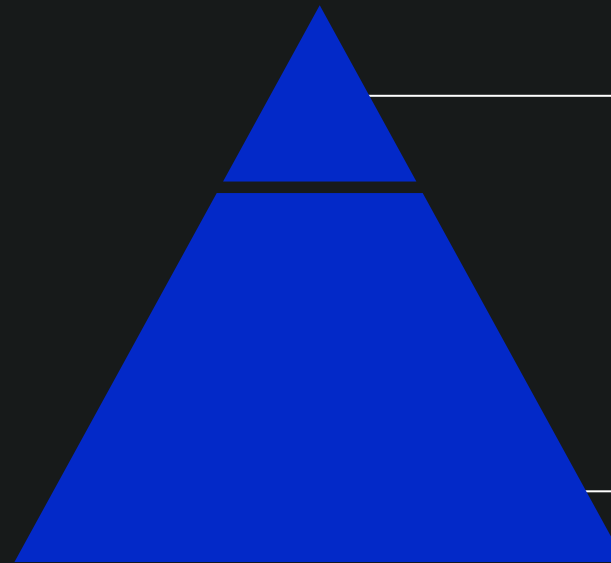
Market-specific data margin of error: General population +/- 2.9% (N=1,150), informed public +/- 6.9% (N = min 200, varies by market), China and U.S. +/- 4.4% (N=500), mass population +/- 3.0% to 3.6% (N =min 736, varies by market).

General Online Population

1,150
respondents
per market

Ages
18+

All slides show general
online population data
unless otherwise noted



Informed Public

500 respondents in U.S. and China;
200 in all other markets

Represents **17%** of total global population

Must meet 4 criteria

- ▶ Ages **25-64**
- ▶ College-educated
- ▶ In top **25%** of household income per age group in each market
- ▶ Report significant media consumption and engagement in public policy and business news

Mass Population

All population not
including informed public

Represents **83%** of total
global population

*TBD - Add a note about Nigeria not in global average
All slides show 27 market averages unless otherwise
indicated*

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PANDEMIC PUTS TRUST TO THE TEST

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A YEAR OF TRUST WINNERS AND LOSERS

Trust Index

15 countries gained trust,
10 countries lost trust

Global Trust Index increases 2 points,
with increases in 17 and decreases in 10 of
27 markets

2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg.

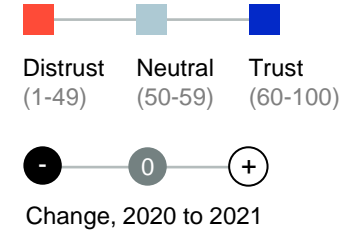
CAUTION: DATA NOT FACT CHECKED

▲ 2020 General population

2020 Trust Index	Country
54	Global 27
82	China
79	India
73	Indonesia
66	Thailand
65	UAE
62	Mexico
62	Singapore
61	Saudi Arabia
60	Malaysia
57	Kenya
57	The Netherlands
53	Canada
53	Colombia
51	Brazil
50	S. Korea
49	Argentina
49	Italy
47	Australia
47	U.S.
46	Germany
45	France
45	Ireland
45	Spain
44	S. Africa
42	Japan
42	UK
30	Russia

▲ 2021 General population | YtY Change

2021 Trust Index	Country	YtY Change
56	Global 27	+2
77	India	-2
72	China	-10
72	Indonesia	-1
69	Saudi Arabia	+8
68	Singapore	+6
67	UAE	+2
66	Malaysia	+6
63	The Netherlands	+6
61	Thailand	-5
59	Australia	+12
59	Kenya	+2
59	Mexico	-3
56	Canada	+3
53	Germany	+7
52	Italy	+3
51	Brazil	0
50	Ireland	+5
48	Colombia	-5
48	France	-5
48	S. Africa	+3
48	U.S.	+4
47	Argentina	+1
47	S. Korea	-2
45	Spain	-3
45	UK	0
40	Japan	-2
31	Russia	+1



EPIDEMIC OF TRUST INEQUALITY SPREADS FURTHER

Trust Index

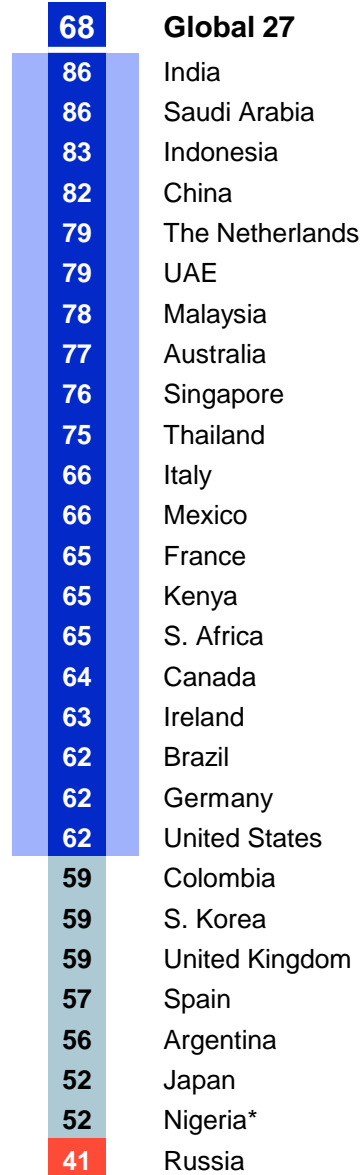
Mass population 16 points less trusting

Record number of markets with double-digit trust inequality

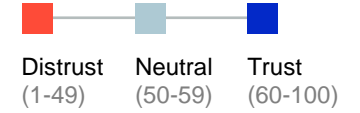
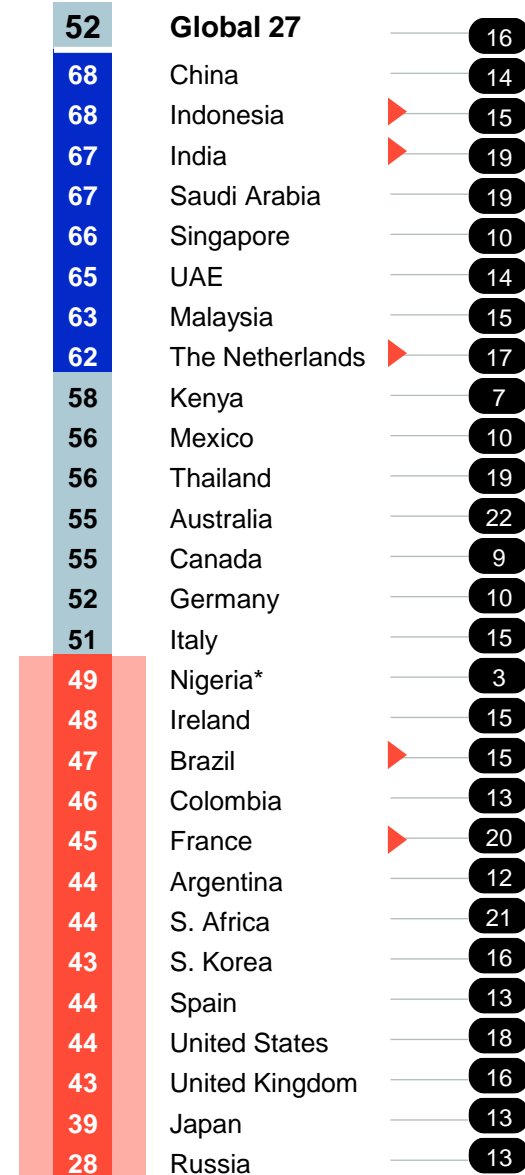
2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, 27-mkt avg. *Nigeria is excluded from the global average.

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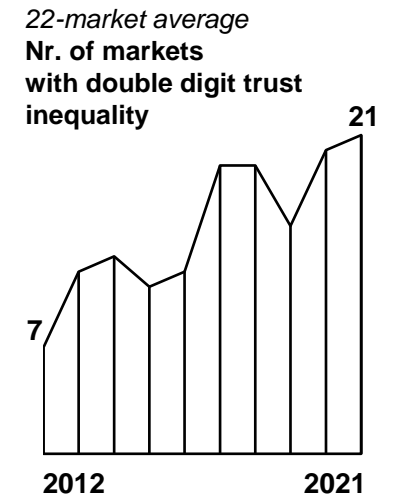
2021 Informed public



2021 Mass population Trust gap



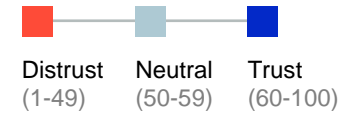
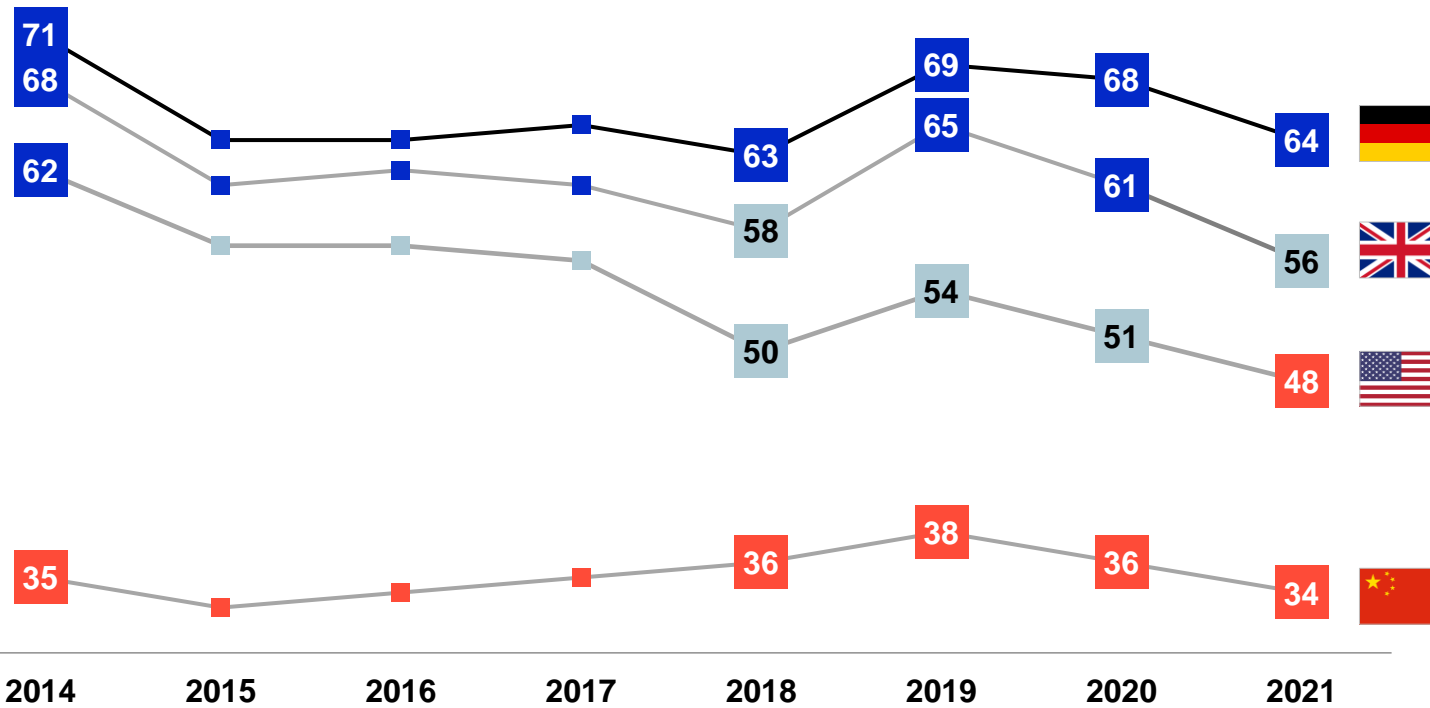
Record trust inequality



MOST POWERFUL COUNTRIES LOSE TRUST CAPITAL

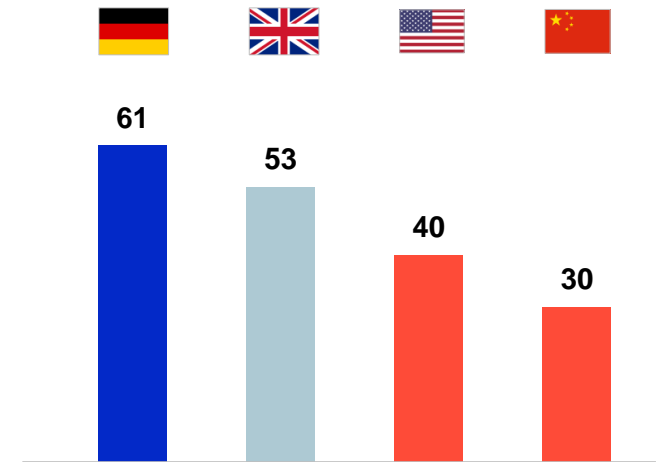
Trust in companies headquartered in each market

Global 22



Global 27

Percent trust in the **national government** of each foreign country

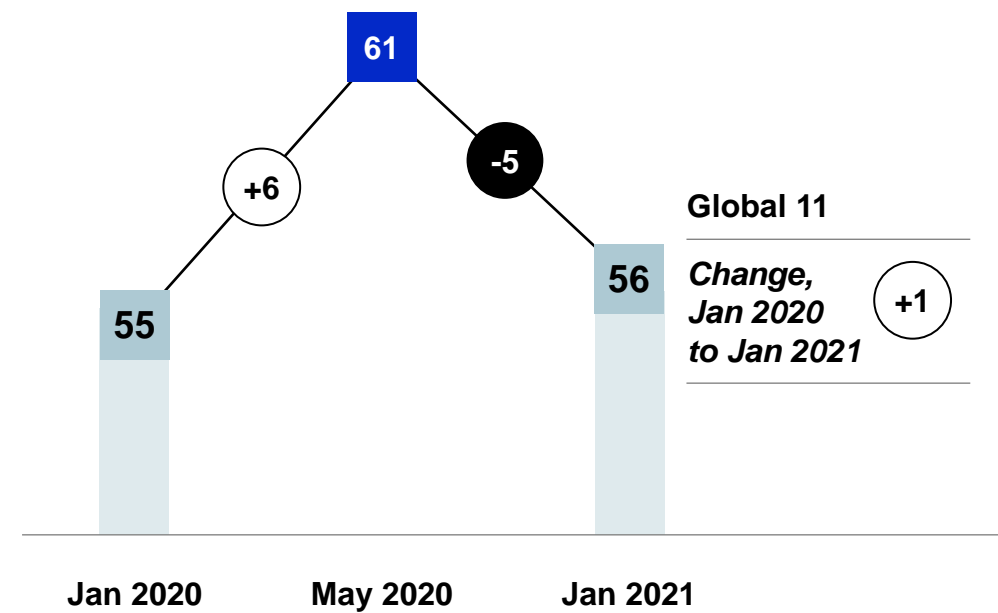
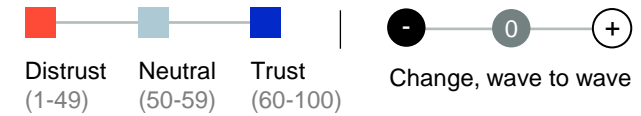


2021 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg. TRU_GOV. Please indicate how much you trust the national government of each of the following countries 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”. 9-point scale; top 4 box, trust. Question asked of half of the sample. Respondents were not asked to rate their home country. General population, 27-mkt avg.

SPRING PANDEMIC TRUST SURGE FOLLOWED BY DECLINES

Trust Index, 11 countries included in the 2020 Trust Barometer Spring Update

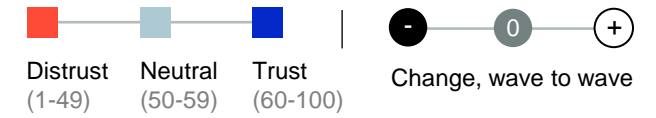
	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021	+/- Jan 2020 to Jan 2021
China	+8	-18	-10
S. Korea	+8	-11	-3
Canada	+10	-7	+3
UK	+10	-7	+3
Mexico	+3	-6	-3
U.S.	+6	-5	+1
Germany	+10	-3	+7
India	+1	-3	-2
France	+4	-1	+3
Japan	-2	0	-2
Saudi Arabia	+7	+1	+8



2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

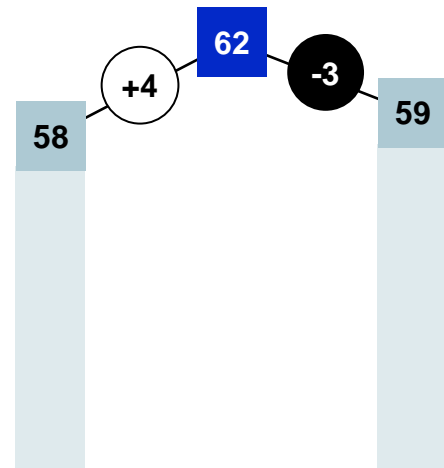
TRUST DECLINES ACROSS ALL INSTITUTIONS FOLLOWING SPRING SURGE

Percent trust (11-market average)

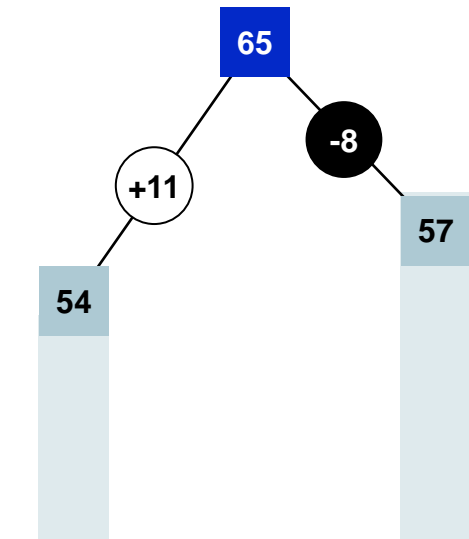


Business

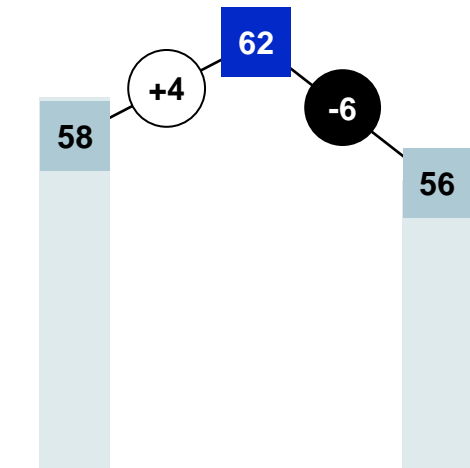
Business trust least volatile



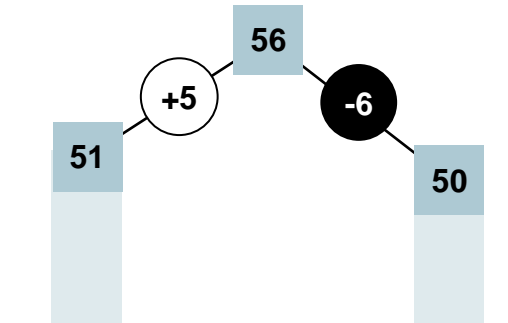
Government



NGOs



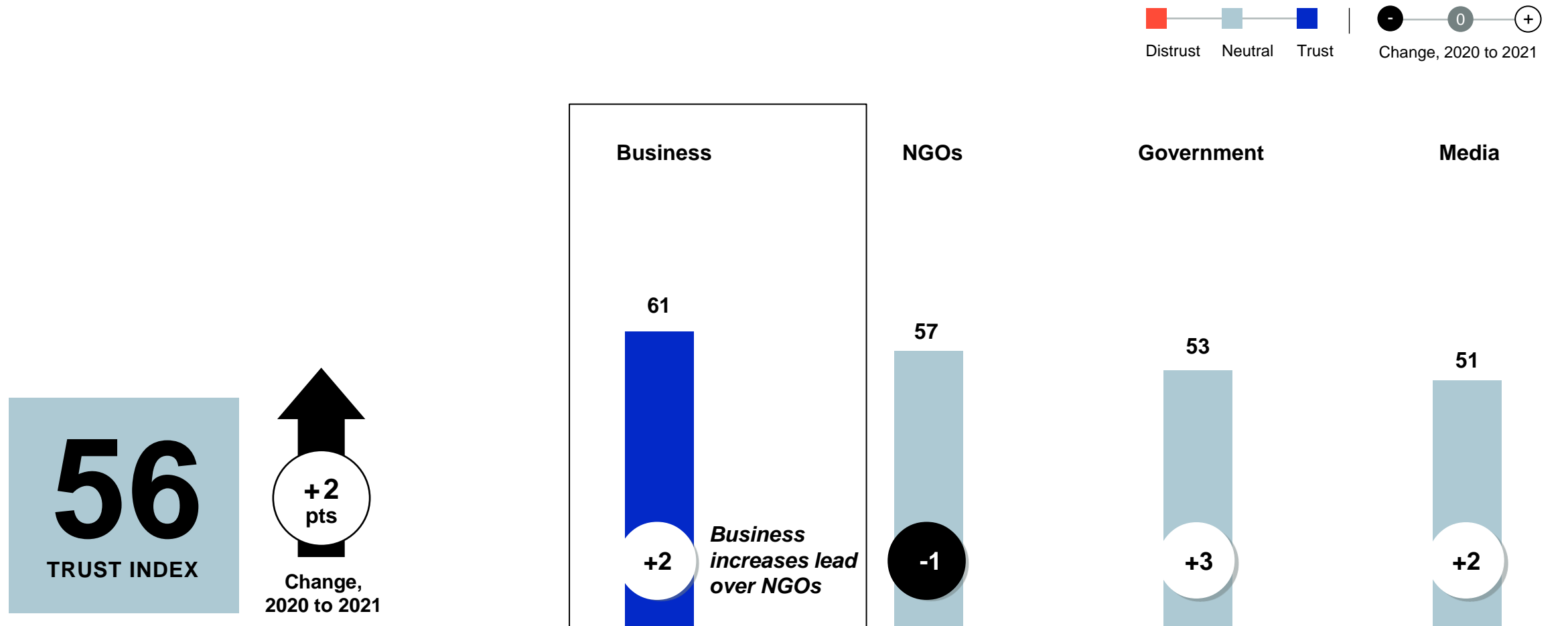
Media



2021 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. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

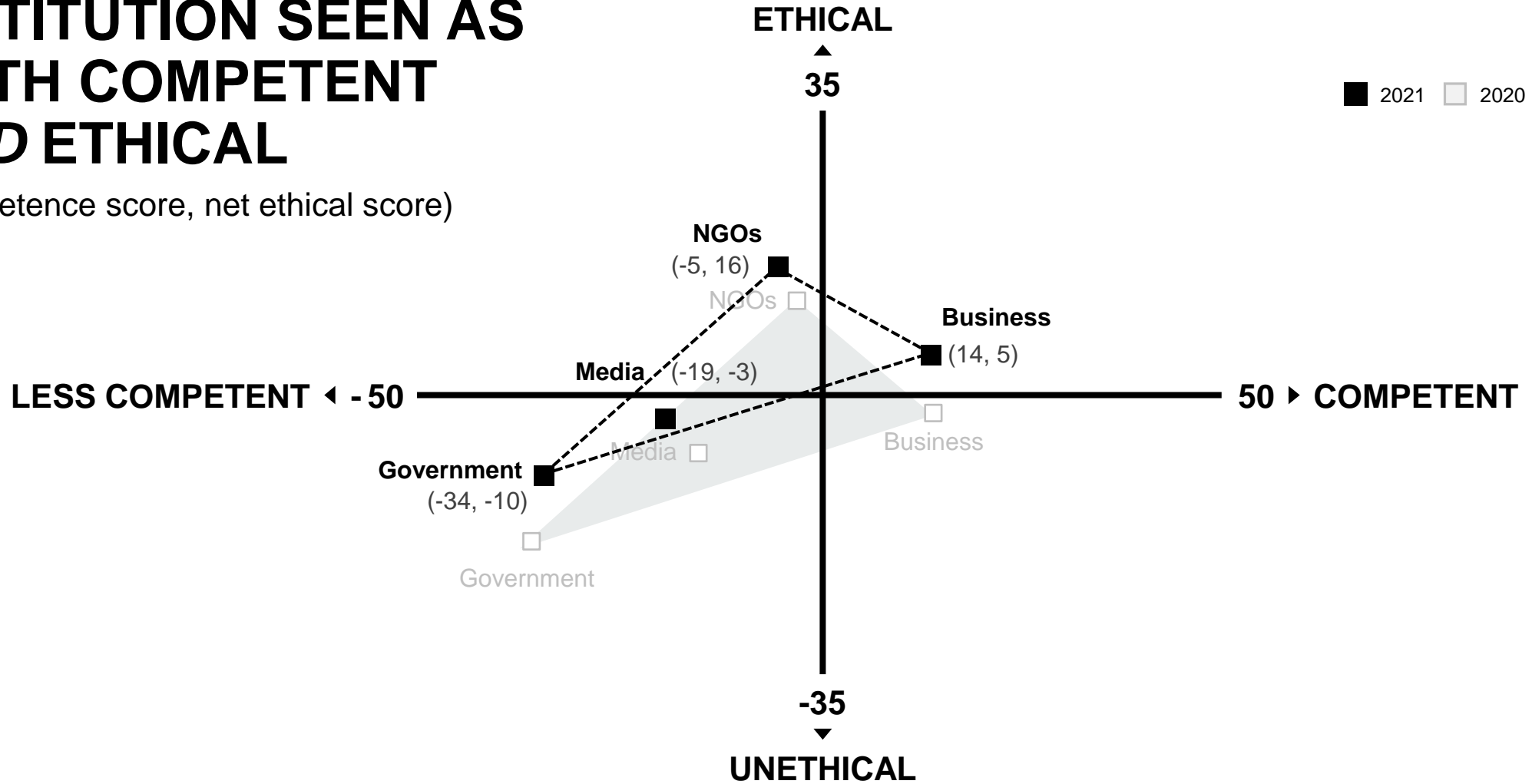
BUSINESS IS MOST TRUSTED INSTITUTION

Percent trust



BUSINESS NOW ONLY INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL

(Competence score, net ethical score)



2021 Edelman Trust Barometer. The ethical scores are averages of nets based on INS_PER_DIM/1-4. Question asked of half of the sample. The competence score is a net based on TRU_3D_INS/1. Depending on the question it was either asked of the full of half the sample. General population, 24-mkt avg. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

MY EMPLOYER CONTINUES TO BE TRUSTED AROUND THE WORLD

Percent trust in my employer

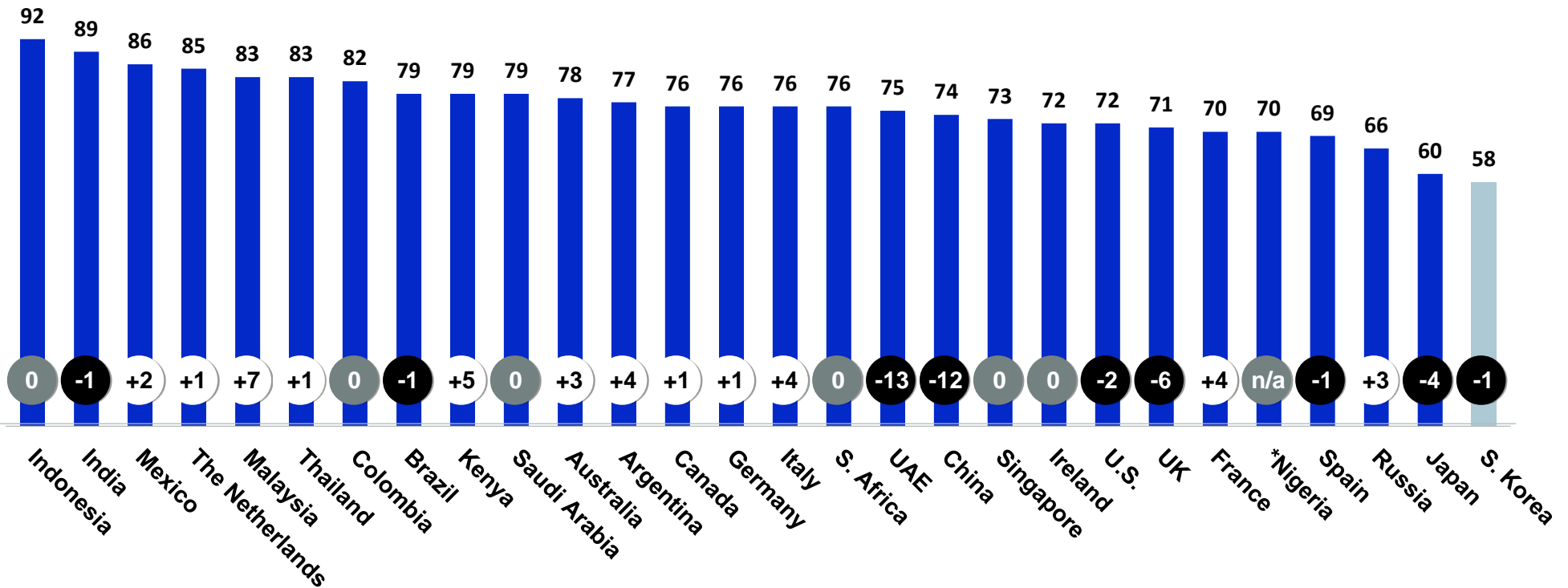


Trust in my employer stable or rising in 18 of 27 markets

Global 27

76%

Business	61
NGOs	57
Government	53
Media	51



My employer more trusted than institutions

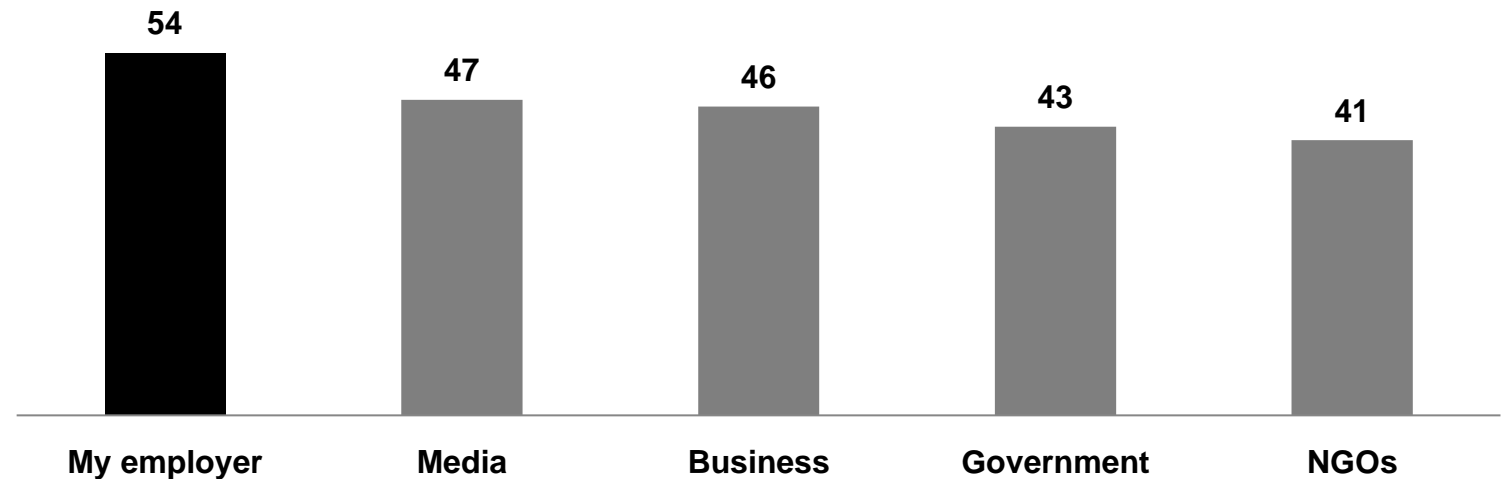
2021 Edelman Trust Barometer. TRU_INS. [Your employer] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. Question asked among those who are employed (Q43/1).

*Nigeria not included in the global average

ALL INSTITUTIONS FAILING ON PANDEMIC RESPONSE

Percent who say each are doing well or very well on the below

Meeting my overall expectations for how they should be responding to the **health and public safety aspects, as well as the economic consequences** of the COVID-19 pandemic



2021 Edelman Trust Barometer. PER_INS. How well do you feel the institution is currently doing each of the following? 5-point scale; top 2 box, doing well. Questions asked of half of the sample. PER_EMP. How well do you believe your employer is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of those who are an employee (Q43/1). General population, 24-mkt avg. Data not collected in China, Russia and Thailand. Data is an average of health safety and economic consequences.

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PANDEMIC FURTHER FUELS FEARS

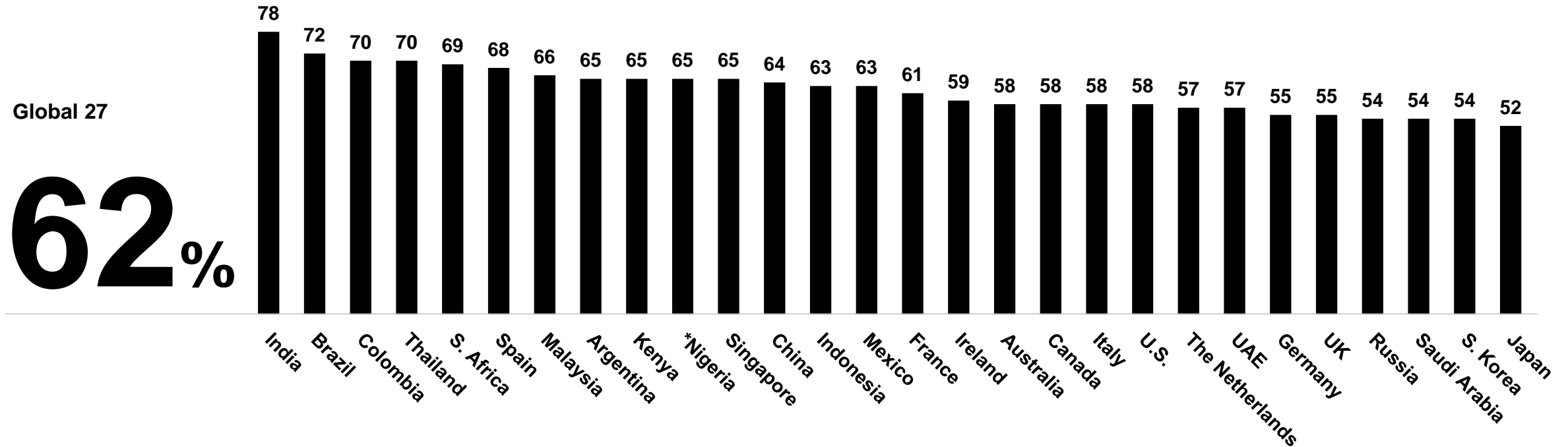
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PANDEMIC DEEPENS INEQUITIES AROUND THE WORLD

Percent who agree

Those with **less education, less money and fewer resources** are being unfairly **burdened** with most of the suffering, risk of illness, and need to sacrifice **due to the pandemic**



2021 Edelman Trust Barometer. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg.

*Nigeria is excluded from the global average.

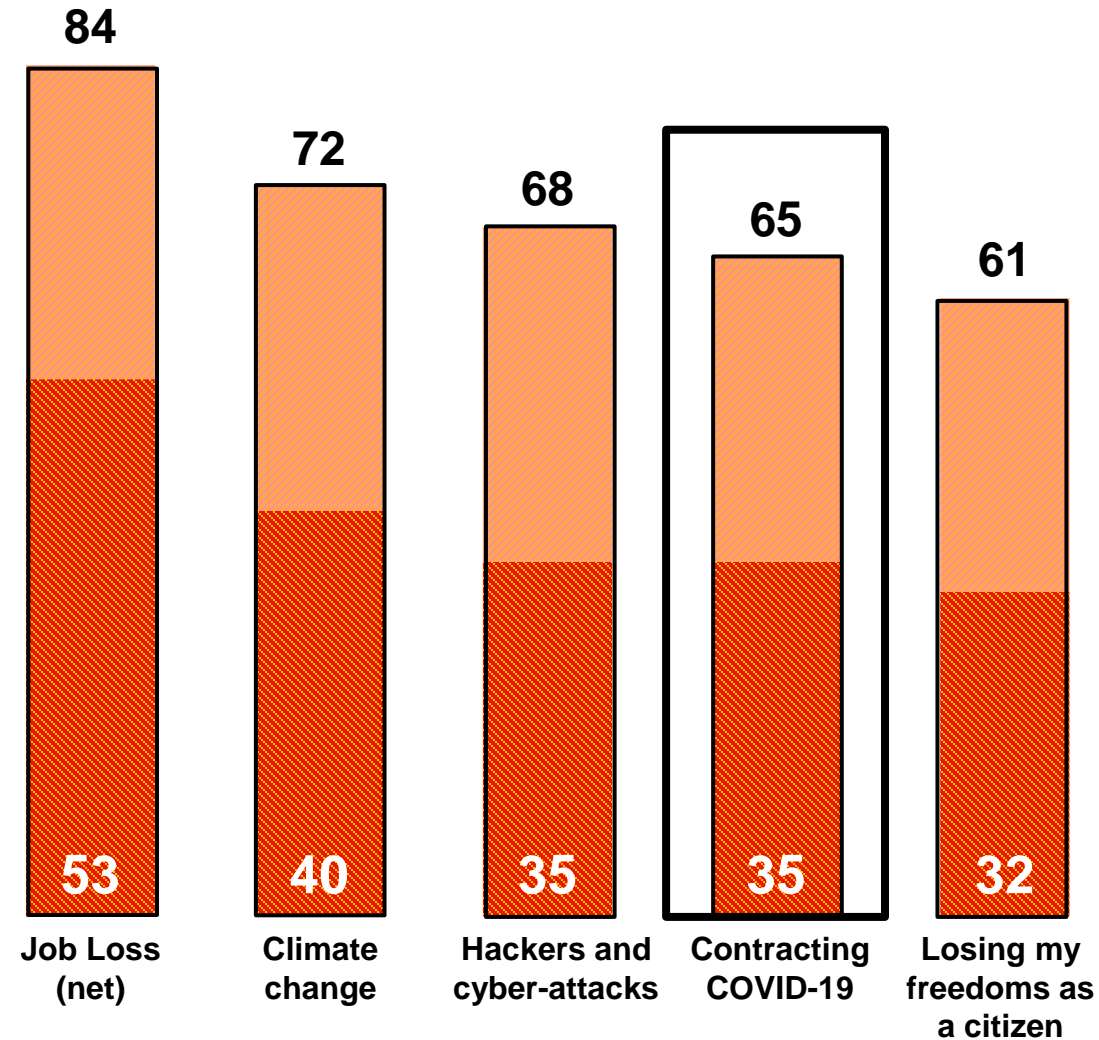
COVID FEARS ADD TO EXISTING CRISES

Percent who are worried

2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes shown to half of the sample. General population, 27-mkt avg. Job loss asked of those who are an employee (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.

CAUTION: DATA NOT FACT CHECKED

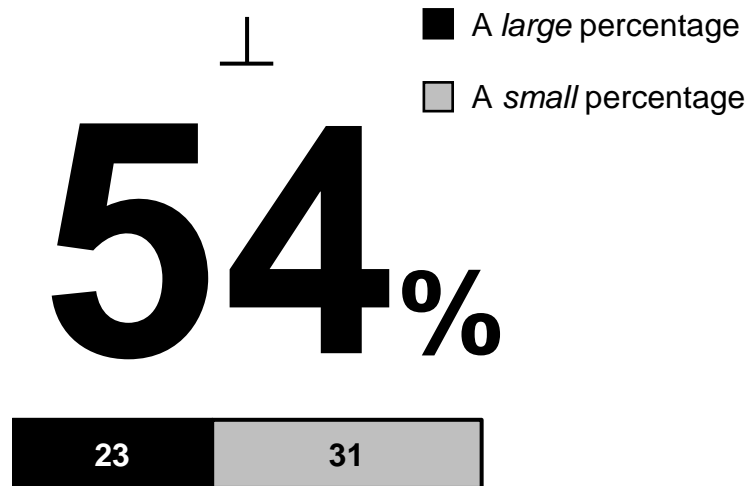
■ Percent who are concerned
■ Percent who are fearful



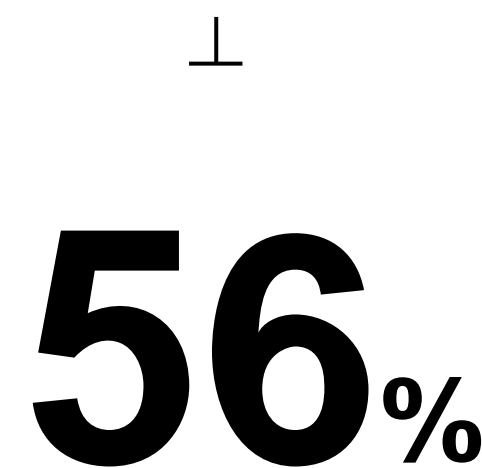
PANDEMIC ACCELERATES JOB LOSS FEARS

Percent who agree

As a result of the economic impact of the pandemic, a **portion of our workforce has seen their work hours reduced or their jobs eliminated**



I worry that the **pandemic will accelerate** the rate at which companies move to **replace human workers with AI and robots**



2021 Edelman Trust Barometer. LAY_OFFS. Has the organization you work for had to lay-off or furlough any employees as a result of the economic impact of the pandemic? Code 1, yes, a large percentage; code 2, yes, a small percentage. Question asked of those who are an employee (Q43/1). Total layoff/furlough percentage is a sum of code 1 and 2. SOC_AGR. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg.

MOUNTING URGENCY OVER NEED TO FIX SOCIETAL PROBLEMS

Change in importance since last year
(more important minus less important)

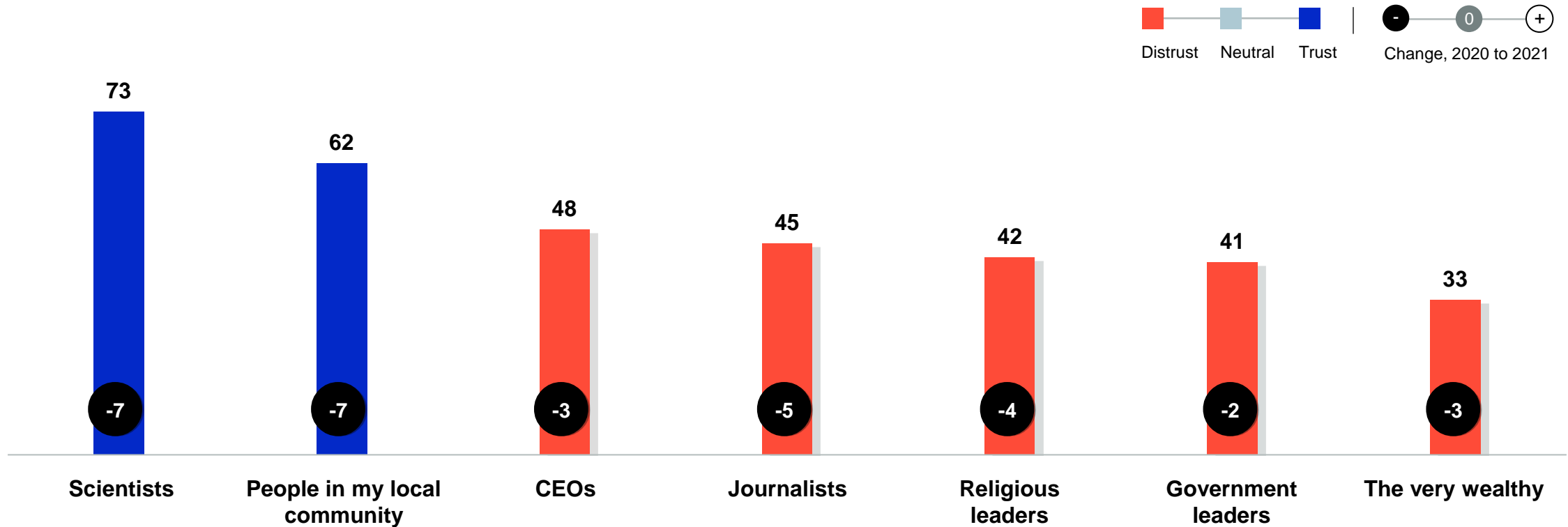
*Change in importance
since the start of the year...*

	Net change	More Important	Less Important
Improving our healthcare system	+62	70	12
Addressing poverty in this country	+53	62	9
Improving our education system	+53	62	9
Addressing climate change	+51	61	10
Finding ways to combat fake news	+50	60	10
Protecting people's individual freedoms	+50	59	9
Closing the economic and social divide	+48	58	10
Addressing discrimination, racism	+42	53	11

2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. General Population, 27-mkt avg. Net change is the difference between more and less important.

DON'T KNOW WHOM TO TRUST

Percent trust



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RAGING INFODEMIC FEEDS MISTRUST

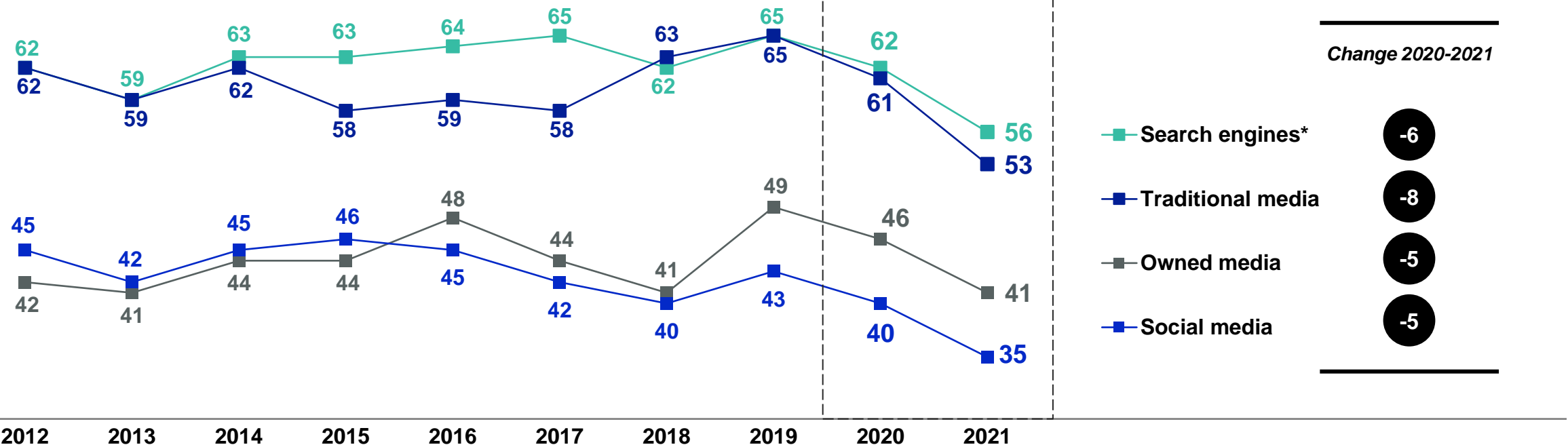
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TRUST IN ALL NEWS SOURCES AT RECORD LOWS

Percent trust in each source for general news and information (22-market average)

Global 22



2021 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? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22 and 27-mkt avg.

*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

Analysis in progress

NEWS ORGANIZATIONS SEEN AS BIASED

Percent who agree

Most news organizations are more concerned with supporting an ideology or political position than they are with informing the public about what is happening in the world

⊥

Global 27

59%

The media is **not** doing well at **being objective and non-partisan** in how it reports the news

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Global 24

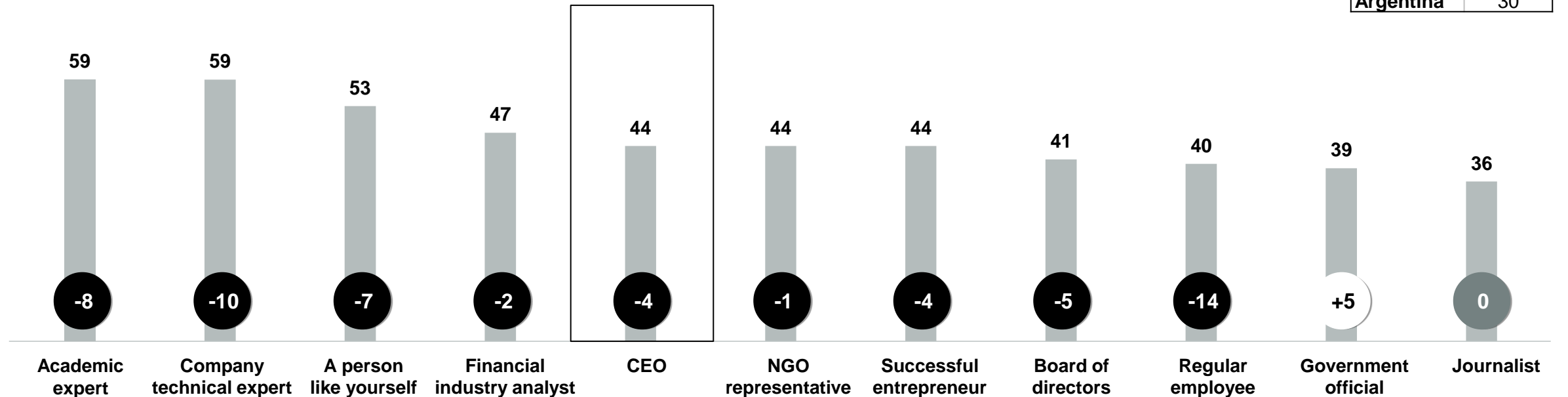
61%

2021 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. General Population, 27-mkt avg. PER_MED. How well do you feel the media is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; **bottom 3 box, not doing well**. Question asked of half the sample. General population, 24-mkt avg. Data not collected in China, Russia, and Thailand.

ALL SPOKESPEOPLE LOSE CREDIBILITY

Percent who rate each source as very/extremely credible

Change, 2020 to 2021



CEO credibility lowest in...	
Japan	18
France	22
Russia	28
Canada	29
Argentina	30

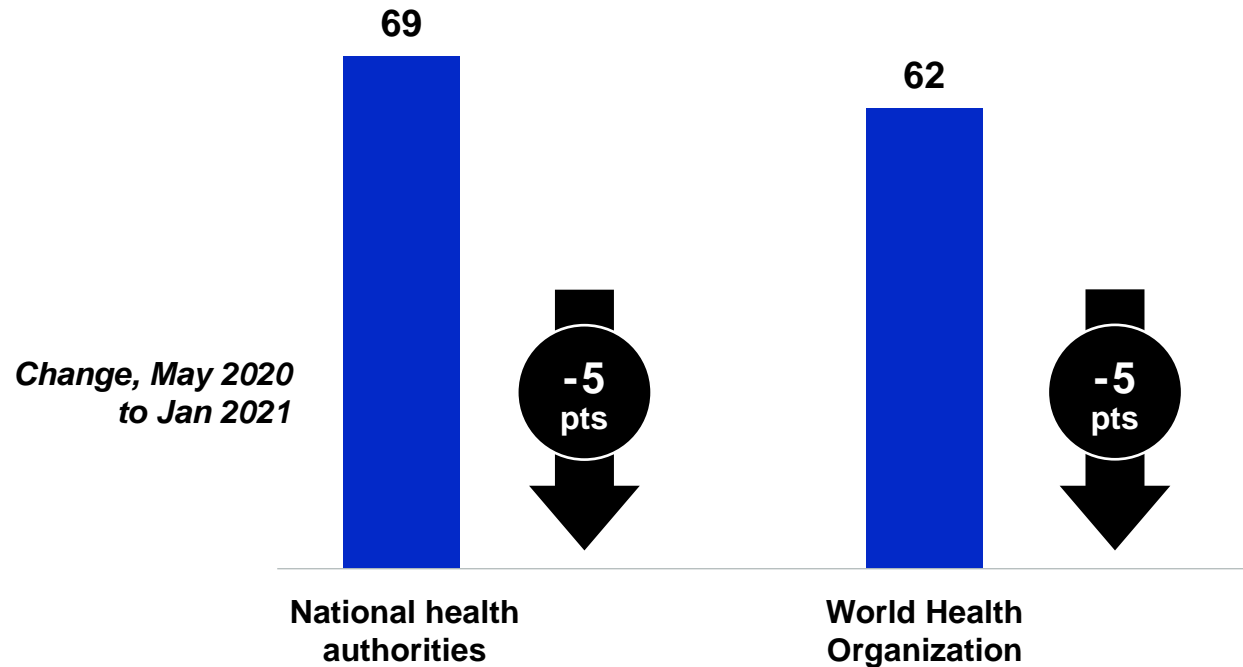
2021 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all. 4-point scale; top 2 box, credible. Spokespeople asked of half of the sample. General population, 27-mkt avg.

PUBLIC HEALTH EXPERTS LOSE TRUST DURING PANDEMIC

Percent trust



Global 11



Global 27

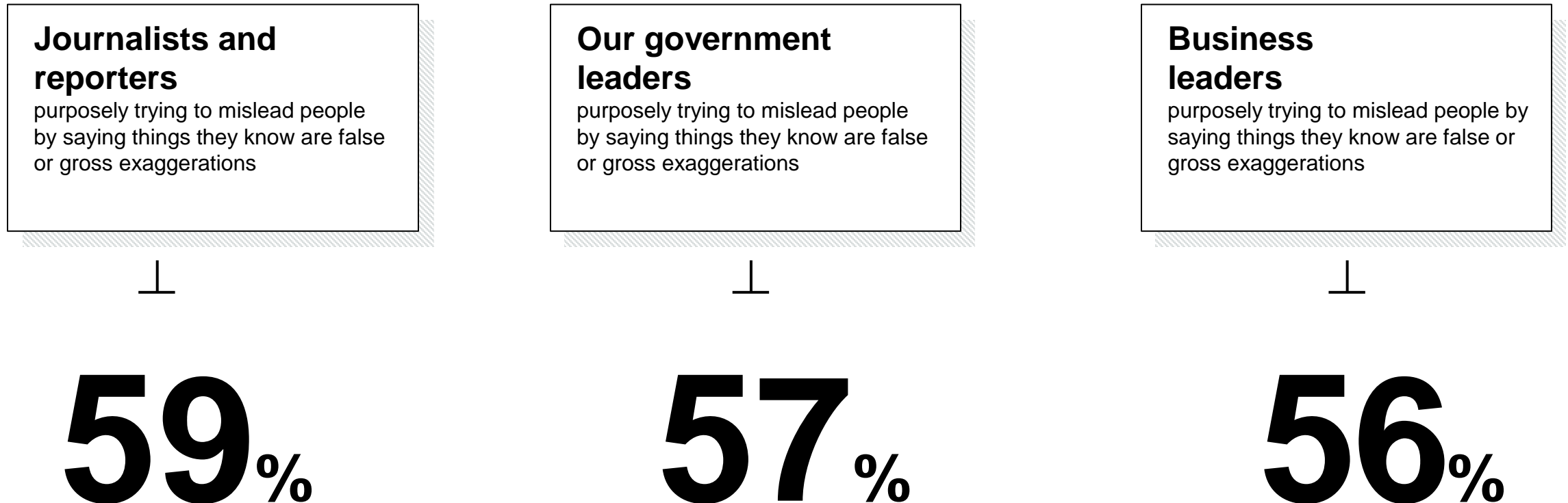
46% agree

it has been difficult for them to find reliable and trustworthy information about the virus and its effects

2021 Edelman Trust Barometer. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-market avg. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Attributes shown to half of the sample. General population, 11-mkt avg.

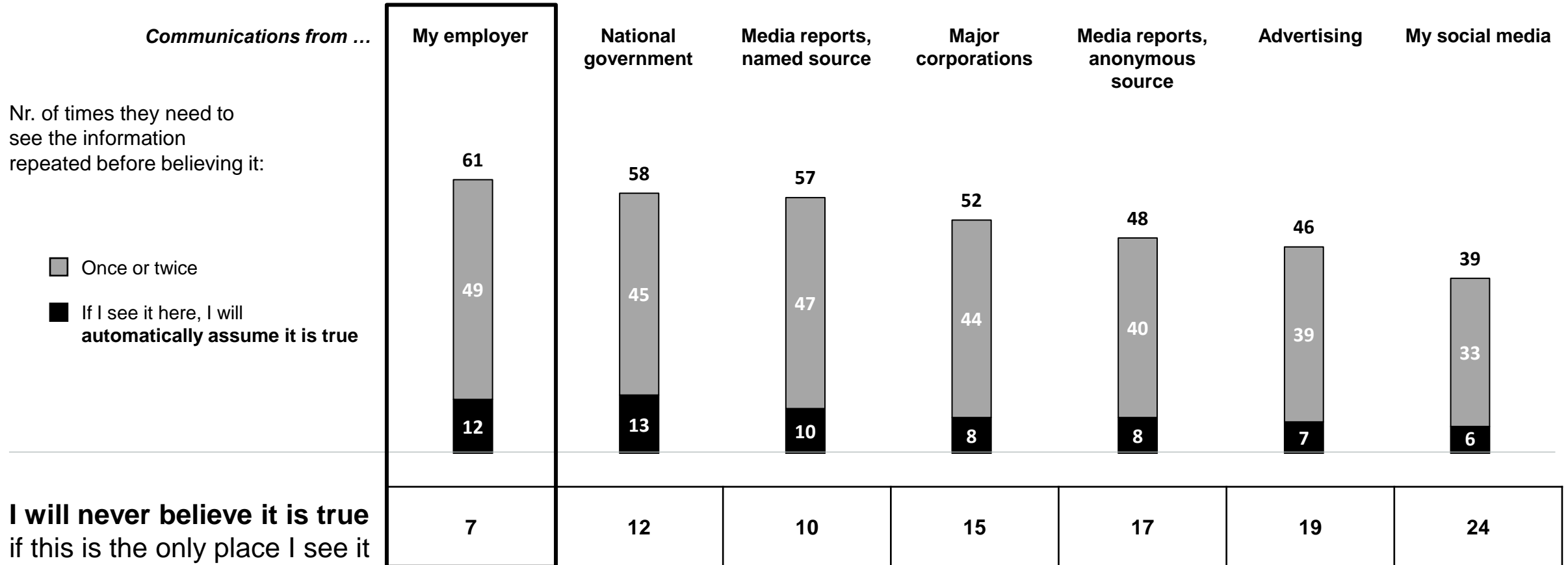
SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Percent who agree



MY EMPLOYER MEDIA MOST BELIEVABLE

Percent who report they believe information from each source



2021 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample. "Once or twice" is a sum of codes 2 and 3. General Population, 27-mkt avg. "Employer communications" was only asked of those employed (Q43/1).

PRIORITIES SHIFT: MY OWN INFORMATION LITERACY NOW MATTERS MORE

Change in importance since last year
(more important minus less important)

Change in importance
since the start of the year...

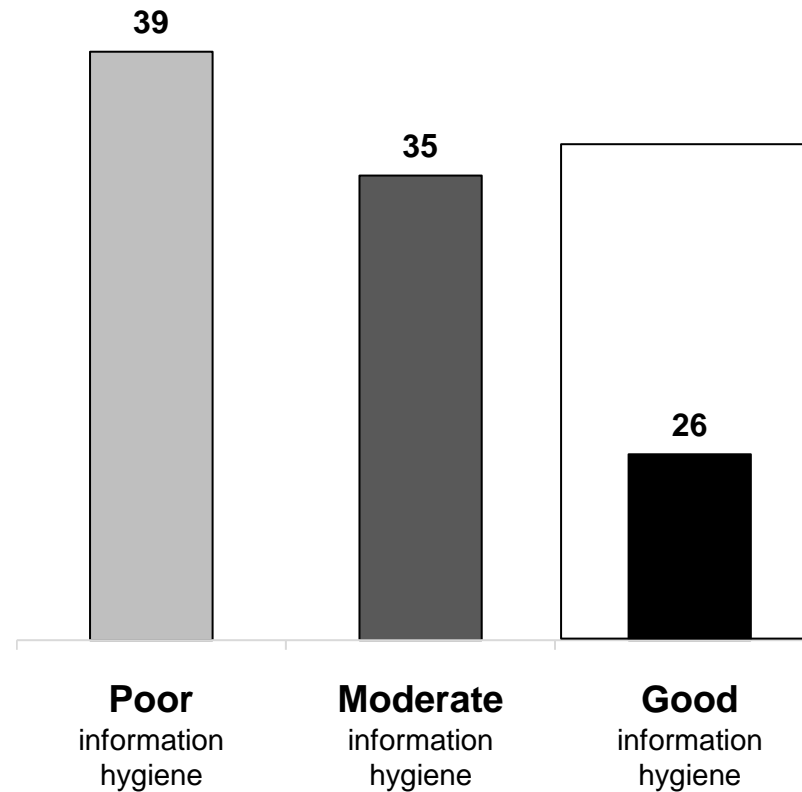
	Net change	More Important	Less Important
Prioritizing my family and their needs	+56	64	8
Increasing my media and information literacy	+46	55	9
Increasing my science literacy	+43	52	9
Being politically aware	+39	51	12
Speaking out when I see the need for changes and reforms	+36	47	11

2021 Edelman Trust Barometer. IMP_VALUES. For each of the following, please indicate whether it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. Question asked of half of the sample. General Population, 27-mkt avg. Net change is the difference between more and less important.

ONLY 1 IN 4 HAVE GOOD INFORMATION HYGIENE

Percent in each segment

- Information hygiene:**
1. News engagement
 2. Avoid information echo chambers
 3. Verify information
 4. Do not amplify unvetted information



57% of respondents **share or forward news items** that they find to be interesting. Of those, **less than 30%** have good information hygiene

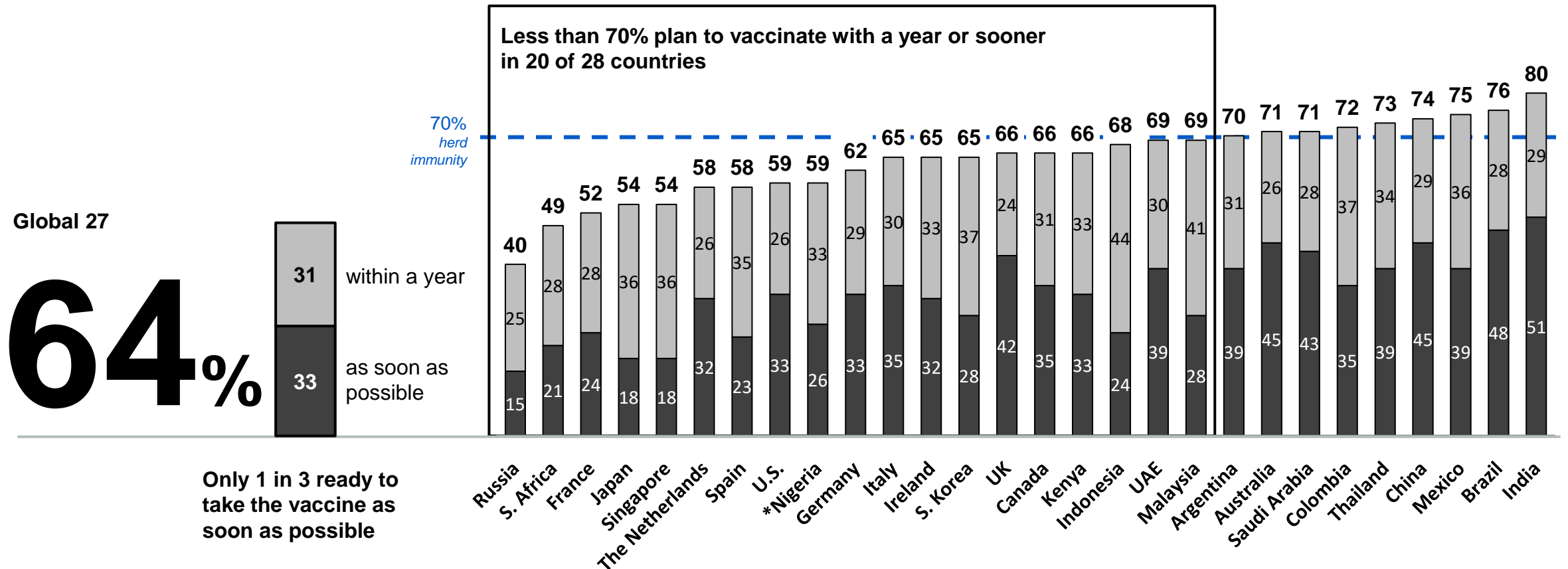
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HIGH STAKES FOR BUSINESS AND PUBLIC HEALTH

┆

AS OF NOVEMBER 2020, VACCINE HESITANCY TOO HIGH TO ACHIEVE HERD IMMUNITY

Percent who say they will take the COVID-19 vaccine when it becomes available



2021 Edelman Trust Barometer. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half the sample. General Population, 27-mkt avg.

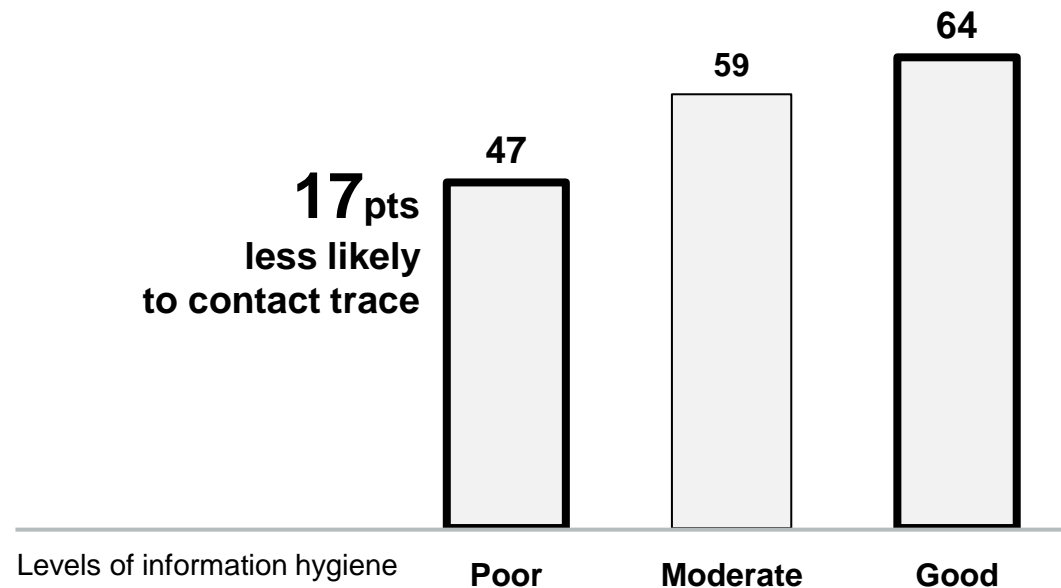
*Nigeria is excluded from the global average.

POOR INFORMATION HYGIENE THREATENS PANDEMIC RECOVERY

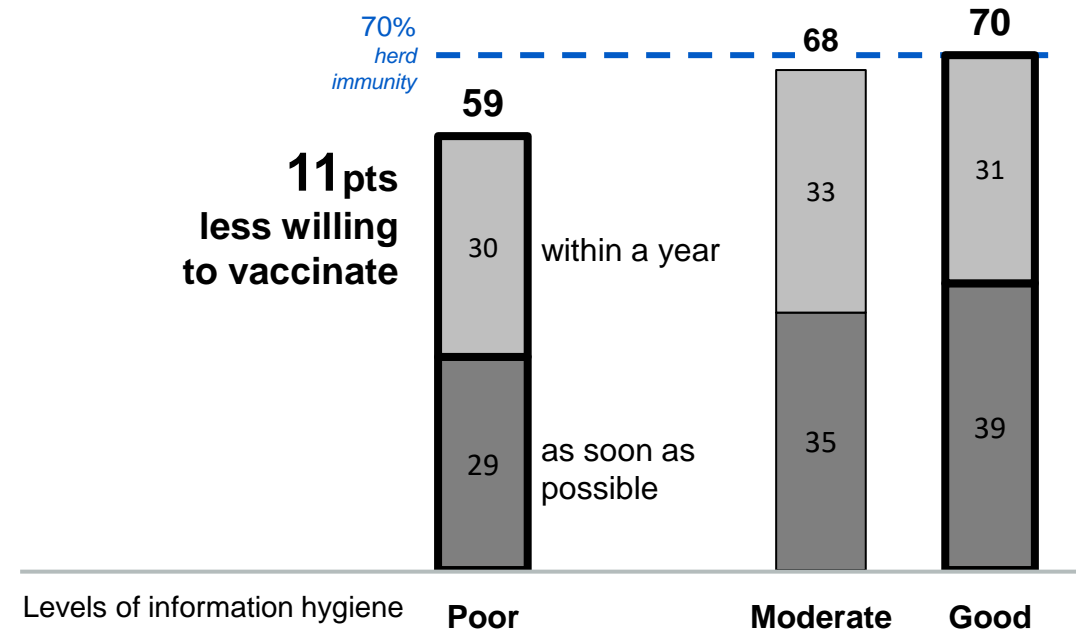
Percent who say they will take the COVID-19 vaccine when it becomes available

LESS LIKELY TO AID CONTACT TRACING

Percent who are willing to give up more personal information to the government to help track and contain the virus



LESS WILLING TO VACCINATE

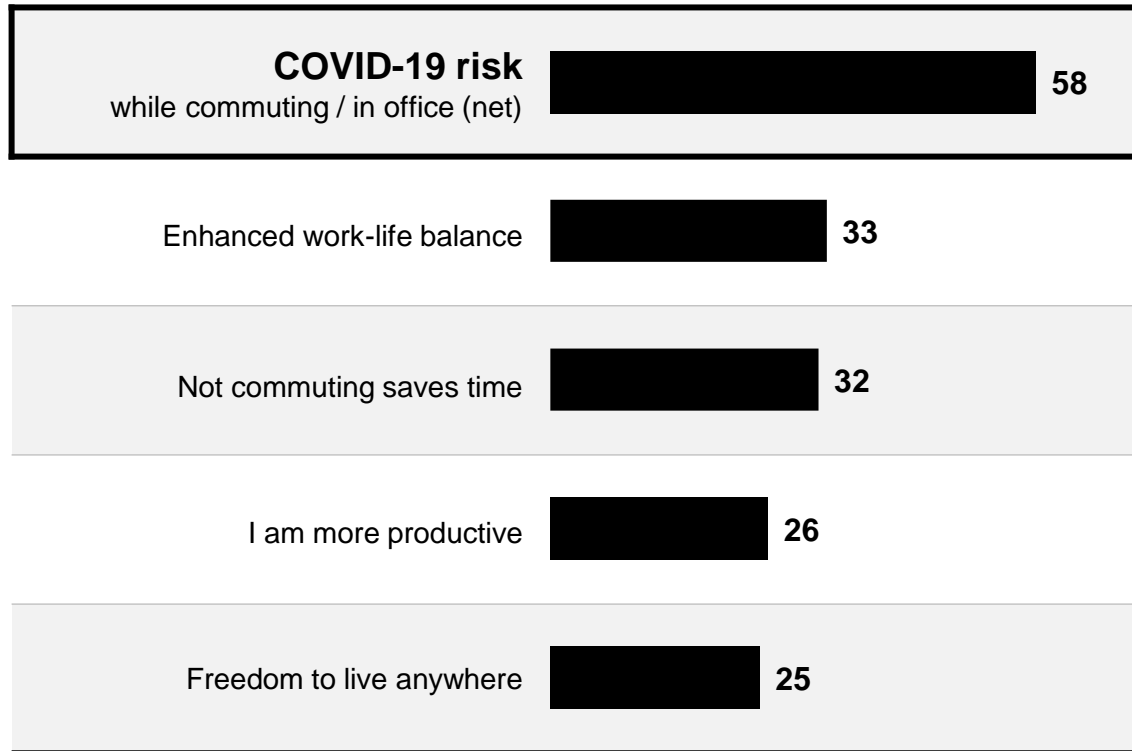


2021 Edelman Trust Barometer. Information Hygiene Scale. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half the sample. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half the sample. General Population, 27-mkt avg. For full details on how the Information Hygiene Scale was built, please refer to the Technical Appendix.

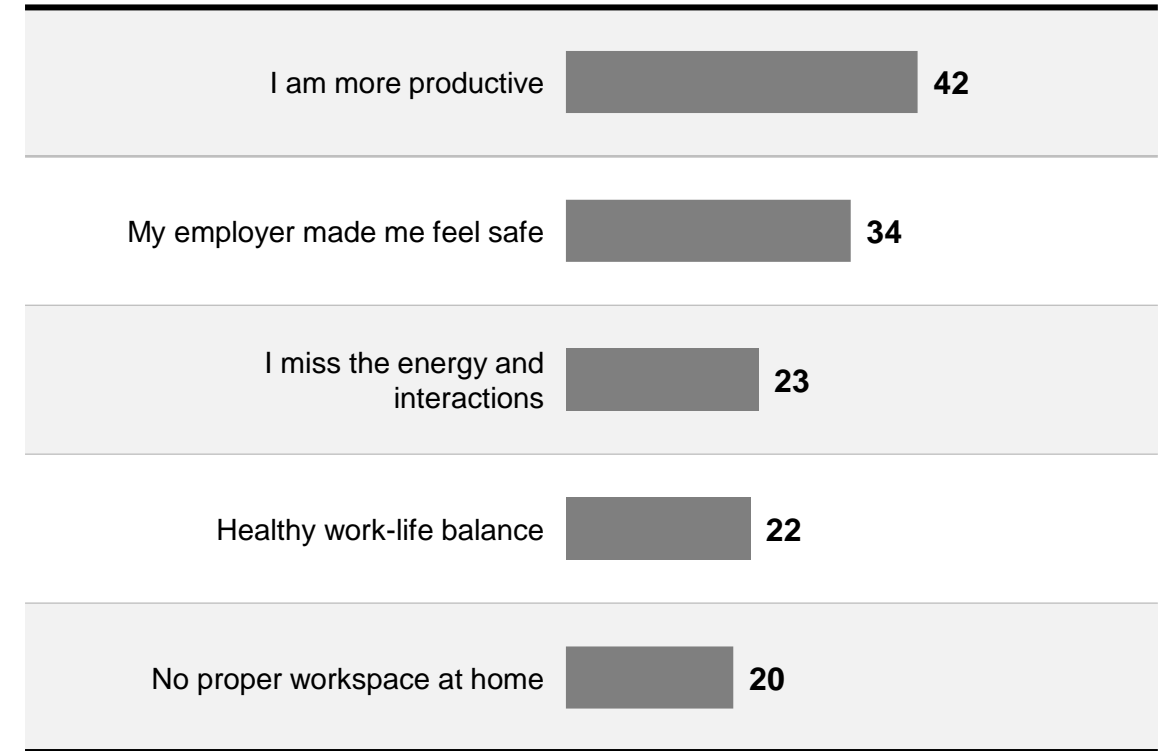
PANDEMIC FEARS IMPEDE RETURN TO WORKPLACE

Percent who say each reason is why they are choosing to work from home vs. returning to the workplace

■ **52%** choosing to work at home, for the following reasons:



■ **48%** choosing to return to the office, for the following reasons:



2021 Edelman Trust Barometer. WHY_HOME. Why are you choosing to continue working from home even though you could return to the workplace if you wanted to? Select all that apply. Question asked of employees that are choosing to work from home (Q43/1 AND WRK_CHOICE/3). WHY_OFFICE. Why are you choosing to work at an office or other workplace even though you could work remotely if you wanted to? Select all that apply. Question asked of employees that are choosing to return to their workplace (Q43/1 AND WRK_CHOICE/4). General Population, 27-mkt avg.

BUSINESS MANDATE NOW INCLUDES BOTH INFODEMIC AND PANDEMIC SOLUTIONS

Top five potential trust gains that business would earn by doing well on each action

Trust gain when performed well	
+5.8pts	Guard information quality
+5.7pts	Embrace sustainable practices
+4.8pts	Robust COVID-19 health and safety response
+4.7pts	Drive economic prosperity
+4.6pts	Long-term thinking over short-term profits

2021 Edelman Trust Barometer. Regression analysis. PER_BUS. How well do you feel business is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of half of the sample. General population, 27-mkt avg. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. For a full explanation of how this data was calculated, please see the Technical Appendix.

⊥

BATTLING THE TWINDEMIC OF COVID AND MISINFORMATION

⊥

BUSINESS EXPECTED TO FILL VOID LEFT BY MEDIA AND GOVERNMENT

Percent who agree

When **the news media is either absent** or failing to supply people with accurate and timely information, **corporations have a responsibility to step in and fill the information void**

⊥

53%

CEOs should step in when the government does not fix societal problems

⊥

68%

CEOs should hold themselves accountable to the public and not just to the board of directors or stockholders of the organizations they run

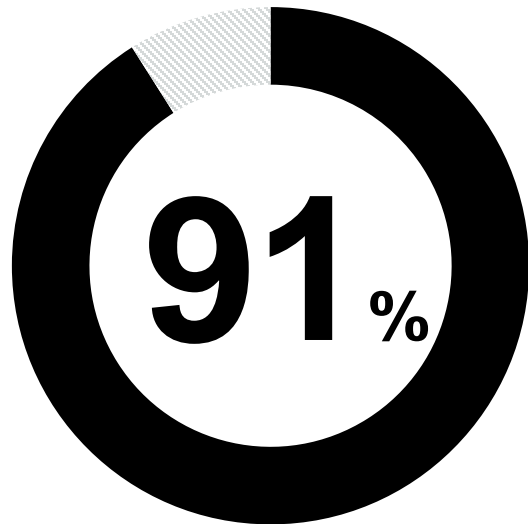
⊥

65%

2021 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? 3-point scale, sum of codes 2 and 3. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, agree. Each question asked of half of the sample. General population, 27-mkt avg.

9 IN 10: CEOs MUST LEAD ON PANDEMIC, JOBS AND SOCIETAL ISSUES

I expect **CEOs to publicly speak out** on one or more of these societal challenges



Pandemic impact	59
Job automation	51
Societal issues	43
Local community issues	40
Hold government accountable	33
Hold media accountable	26
Protests or civil unrest	20

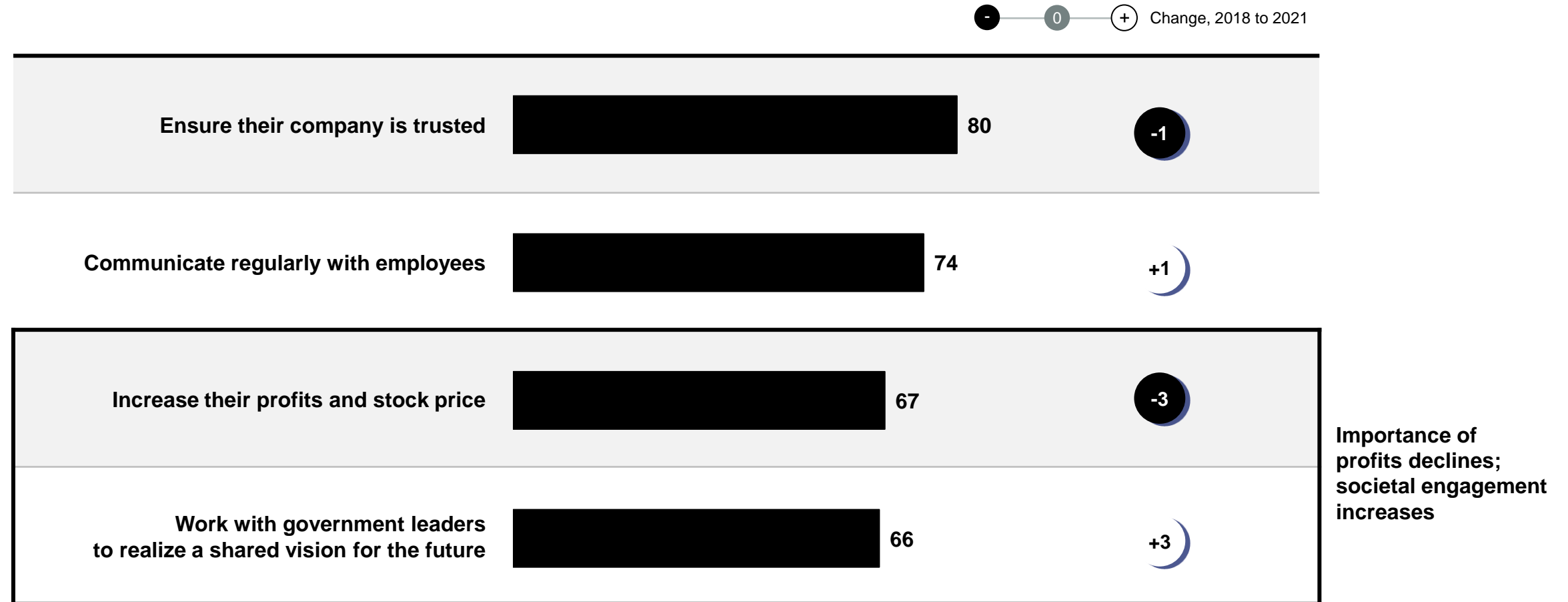
Percent who agree

CEOs should take the lead on change rather than waiting for government to impose change on them

66%

A NEW CEO MANDATE: SOCIETAL ENGAGEMENT NOW AS IMPORTANT AS PROFITS

Percent who expect the following from CEOs



2021 Edelman Trust Barometer. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? 3-point scale, sum of codes 2 and 3. Question asked of half of the sample. General population, 22-mkt avg.

EMPLOYER EXPECTATIONS: SAFETY AND JOBS TRAINING MATTER EVEN MORE

Change in importance since last year
(more important minus less important)

Change in importance as an employer attribute since the start of the year...

	Net change	More Important	Less Important
Keep workers, customers safe	+49	59	10
Job skills training programs	+44	54	10
Regular employee communications	+44	54	10
Remote work options post-pandemic	+42	54	12
Has weathered crises well	+42	52	10
Management always tells the truth	+41	53	12

2021 Edelman Trust Barometer. EMP_IMP_VAL. When considering an organization as a potential place of employment, please indicate whether each of the following has become more important to you, less important to you, or has stayed the same in importance since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. Question asked of those who are an employee (Q43/1). General Population, 27-mkt avg. Net change is the difference between more and less important.

CEOS EXPECTED TO REIMAGINE THE POST-PANDEMIC WORKPLACE

Which best describes how you want CEOs to respond to the pandemic?

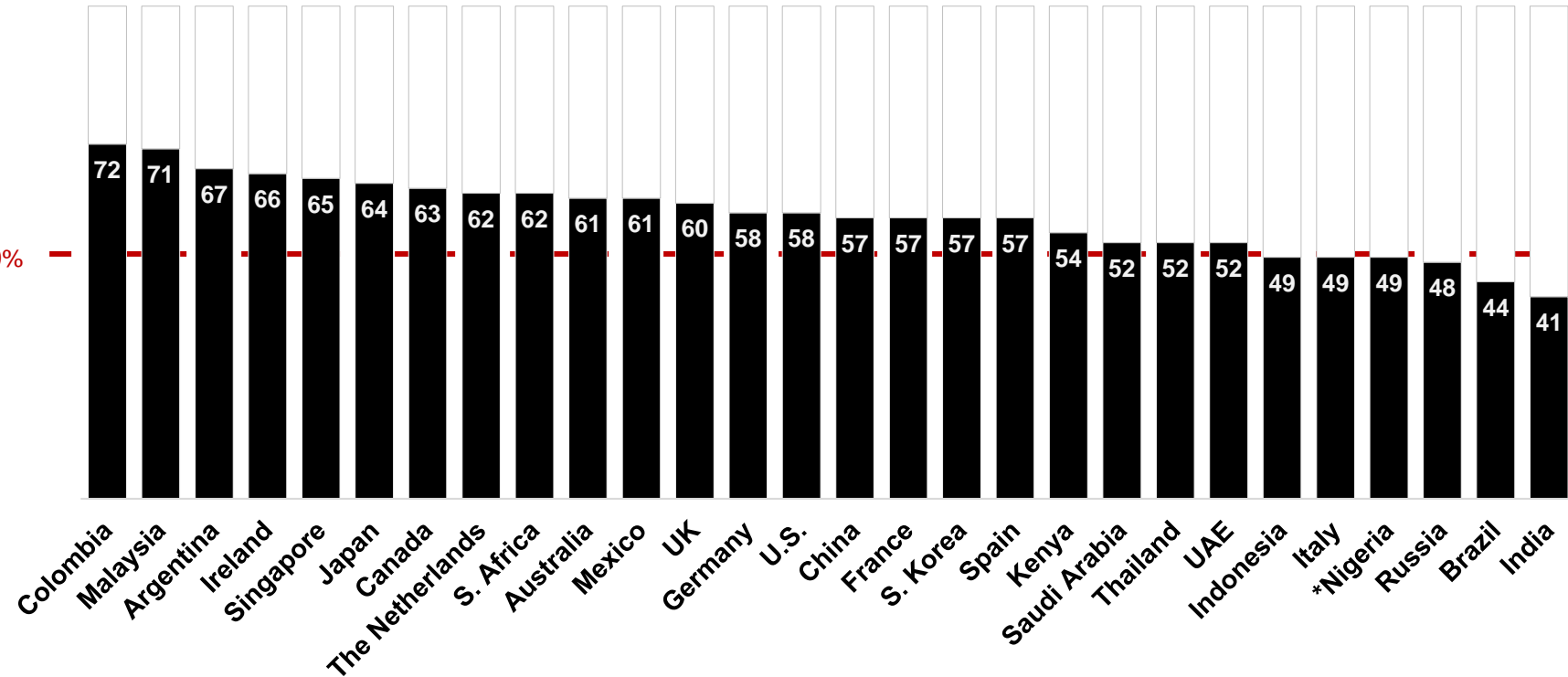
Global 27

CEOs should...

42% safely return the workplace back to the way things were pre-pandemic

OR 50%

58% re-imagine the workplace and how people work



2021 Edelman Trust Barometer. CEO_CHOICE. You are about to see two choices. We want you to choose the one that best describes how you want CEOs to respond to the pandemic. Question asked of half of the sample. General population, 27-mkt avg. *Nigeria is excluded from the global average.

CEOS EXPECTED TO REIMAGINE THE POST-PANDEMIC WORKPLACE

Which best describes how you want CEOs to respond to the pandemic?

Global 27

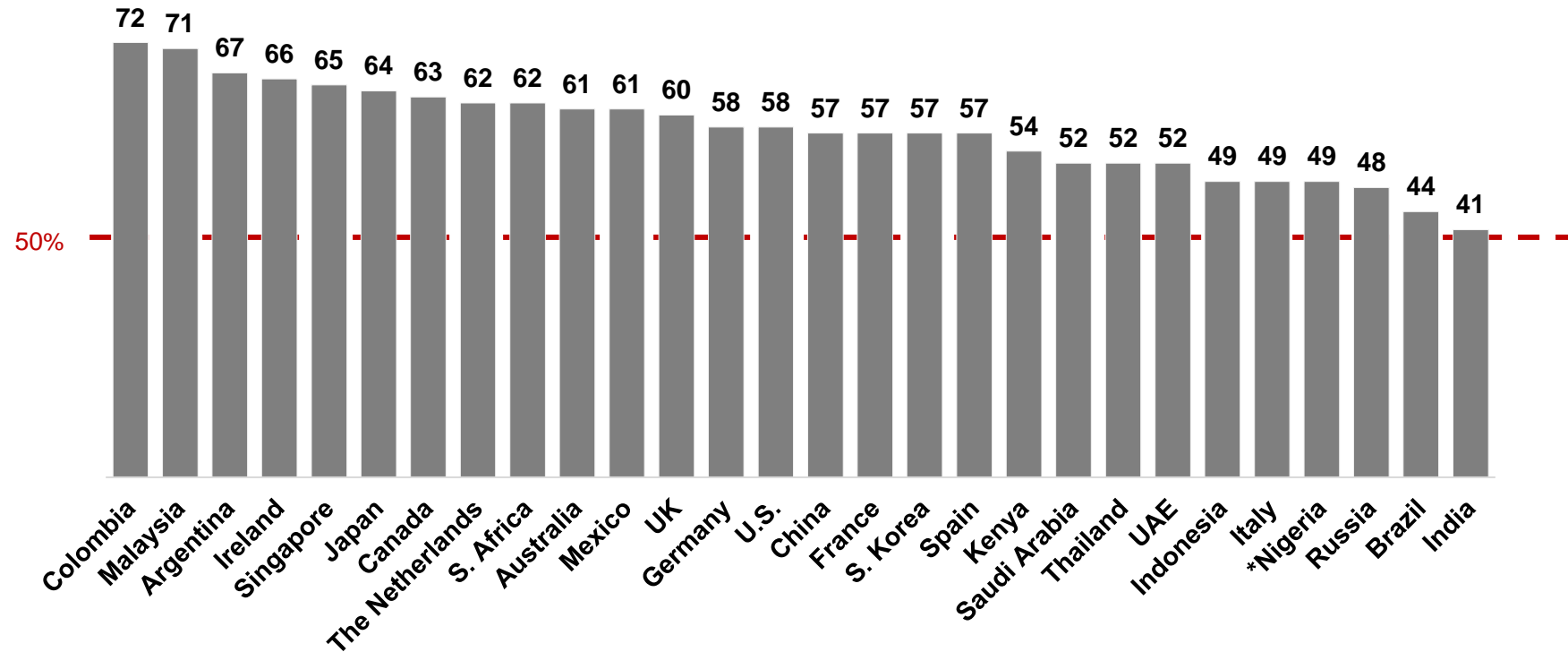
CEOs should...

58%

re-imagine the workplace

vs.

returning to the way things were



2021 Edelman Trust Barometer. CEO_CHOICE. You are about to see two choices. We want you to choose the one that best describes how you want CEOs to respond to the pandemic. Question asked of half of the sample. General population, 27-mkt avg. *Nigeria is excluded from the global average.

TRUST ESSENTIAL TO FIGHTING THE TWINDEMIC OF COVID AND MISINFORMATION

1

Embrace new mandate to prioritize societal engagement

2

Fight the infodemic and advocate for vaccinations

3

Accelerate job creation and skills training during economic crisis

4

Ensure a safe return to work and re-imagine the workplace

DRAFT

- 1) Stop short-term thinking
- 2) Use employer media to inform your employees
- 3) Model good information hygiene (e.g., information before vaccination)
- 4) Lead on stemming growing societal inequities
- 5) Reimagine the workplace and prepare employees for the future of work

⌊

SUPPLT DATA AND TECH APPENDIX TO COME

⌋