



Edelman Trust Barometer 2021



DUE TO THE COVID-19 PANDEMIC FOR THE HEALTH + SAFETY OF STAFF + CUSTOMERS WE ARE CLOSED UNTIL FURTHER NOTICE.



21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 countries*

33,000+ respondents

2021 Edelman Trust Barometer fieldwork
conducted from October 19 to November 18, 2020

**The 2021 Trust Barometer 27-market global averages (for the general population, mass population and informed public) do not include Nigeria*

27-market global data margin of error: General population +/- 0.6% (N=31,050); informed public +/- 1.3% (N=6,000); mass population +/- 0.6% (N=25,050+); half-sample global general online population +/- 0.8% (N=15,525).

Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).

U.S. Post-Election Supplement ethnicity-specific data margin of error: Non-Hispanic White +/- 3.3% (N=894); all others +/- 4.0 (N=607).

General Online Population

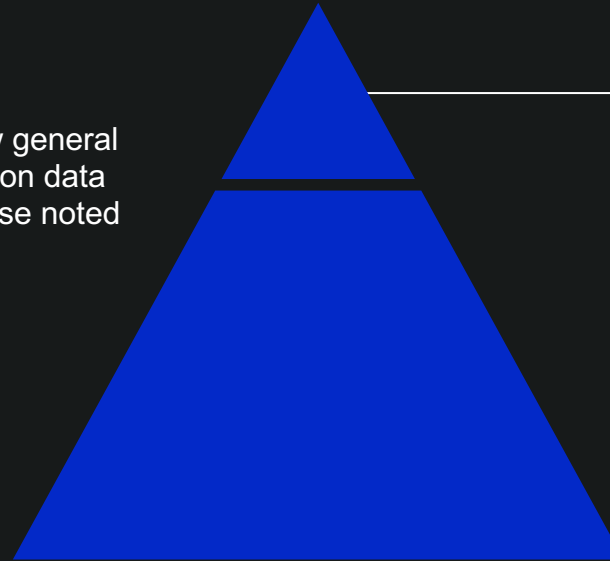
1,150

respondents per country

Ages

18+

All slides show general
online population data
unless otherwise noted



Informed Public

500 respondents in U.S. and China;
100 respondents in Nigeria;
200 in all other countries

Represents **17%** of total global population

Must meet 4 criteria:

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

Mass Population

All population not including
informed public

Represents **83%** of total global
population



U.S. Post-Election Supplement

1,500 U.S. respondents, fielded December 14 to 18, 2020

21 YEARS OF TRUST

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummet	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	
Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	The Battle for Truth	Trust at Work	Trust: Competence and Ethics	Declaring Information Bankruptcy	



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PANDEMIC PUTS TRUST TO THE TEST

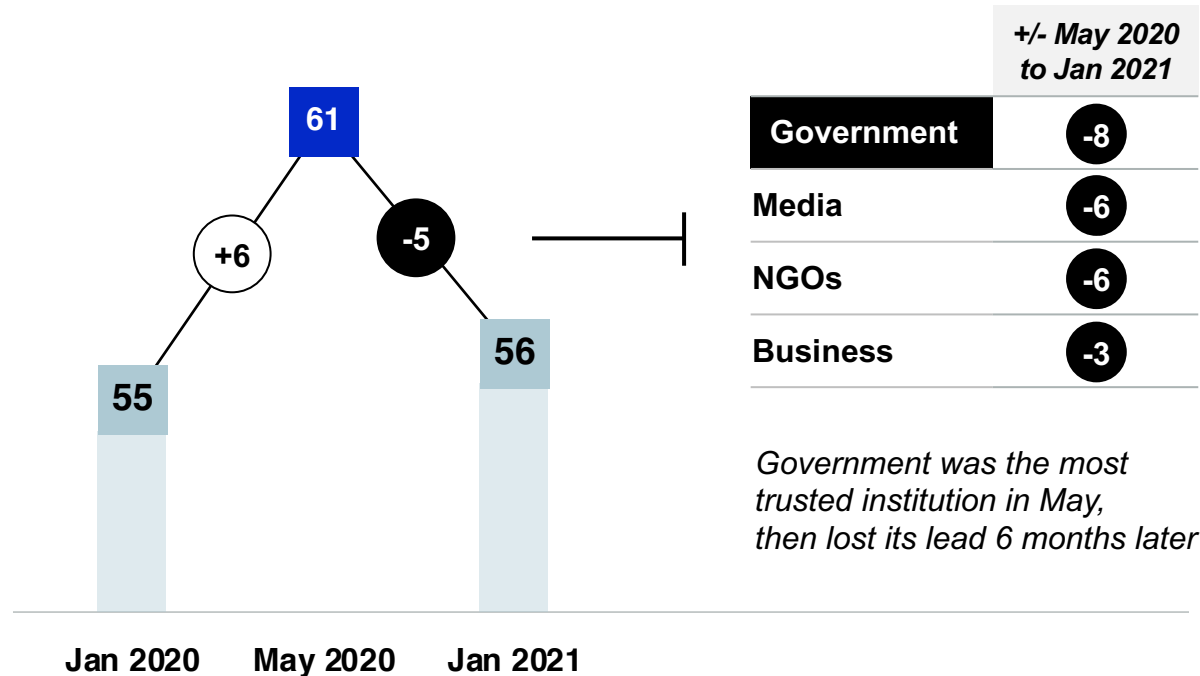
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SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

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



Global 11

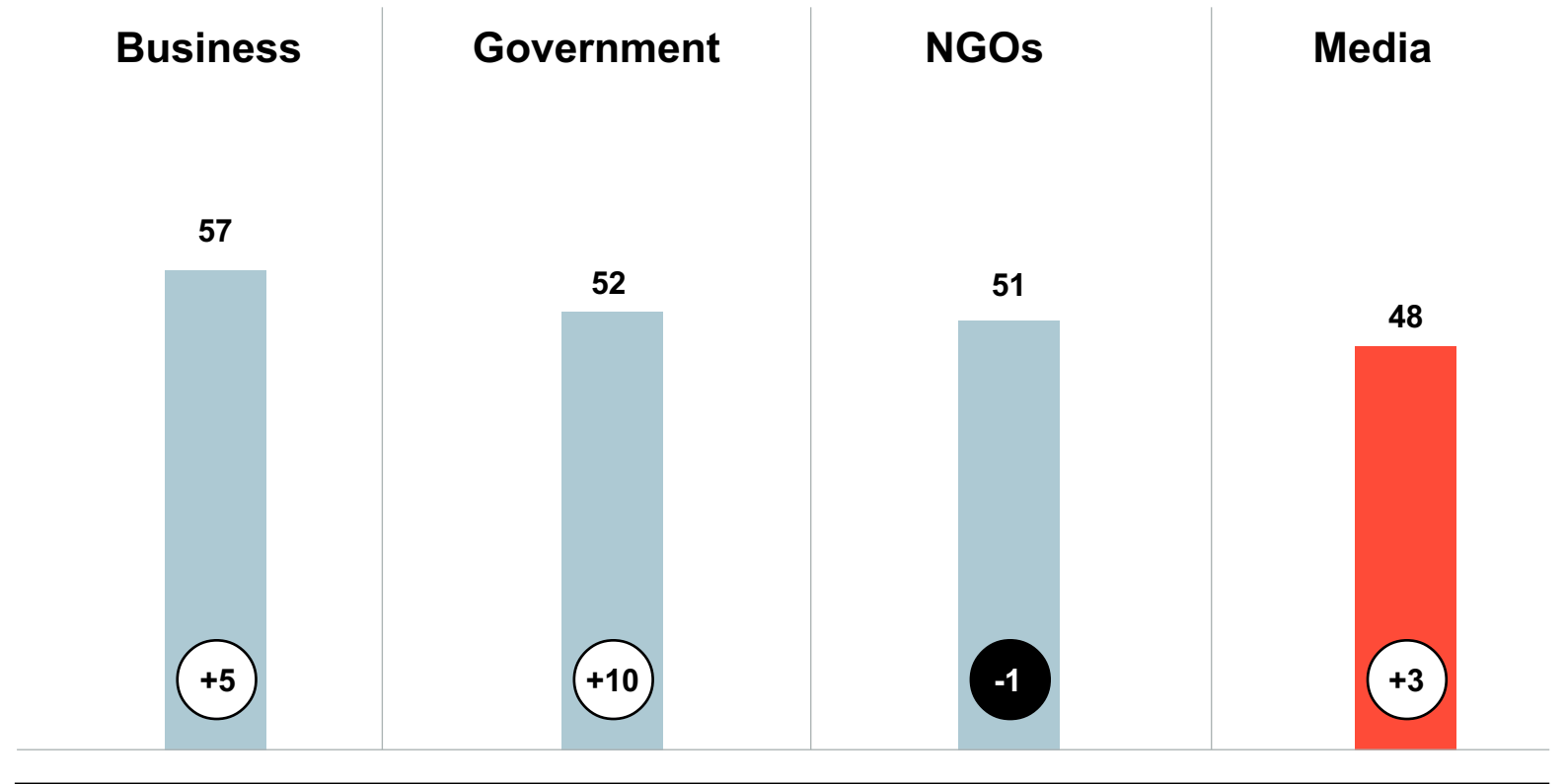


Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

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.

IN EU, TRUST INCREASE FOR GOVERNMENT AND BUSINESS; BUT NO INSTITUTIONS TRUSTED

Percent trust, in EU



TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

Percent trust in my employer

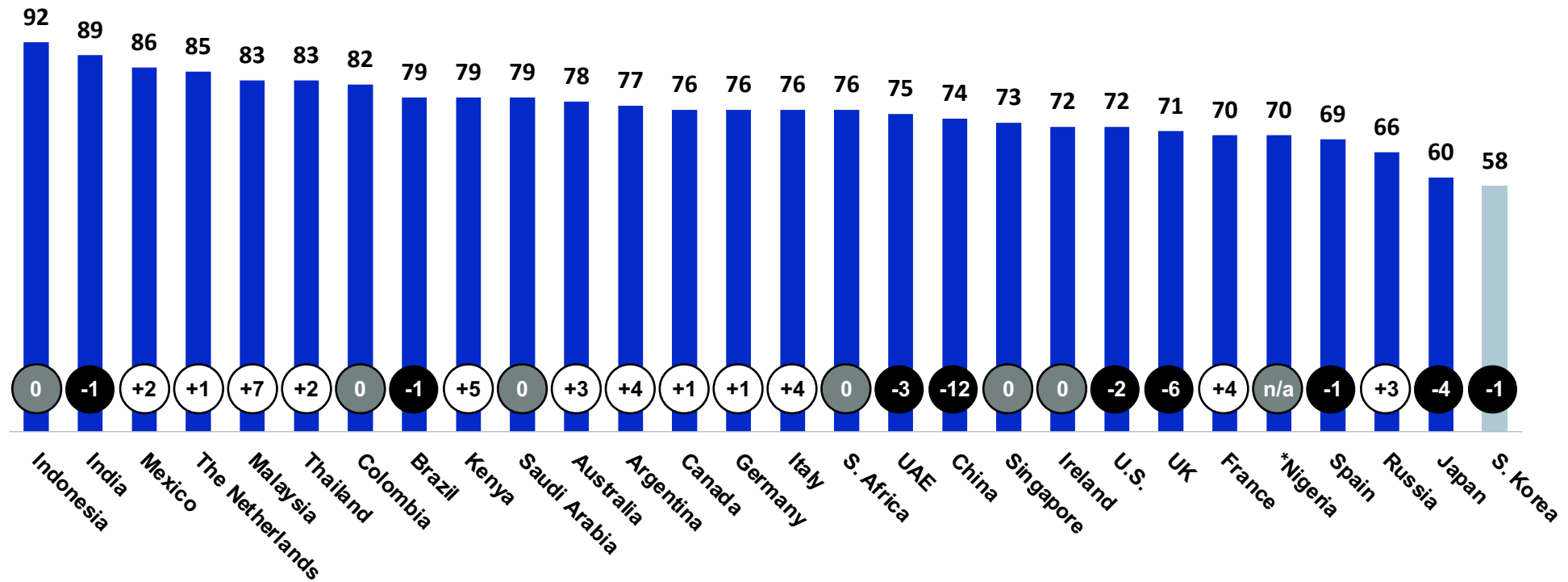


EU

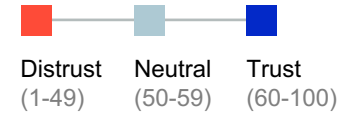


Business	57
Government	52
NGOs	51
Media	48

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

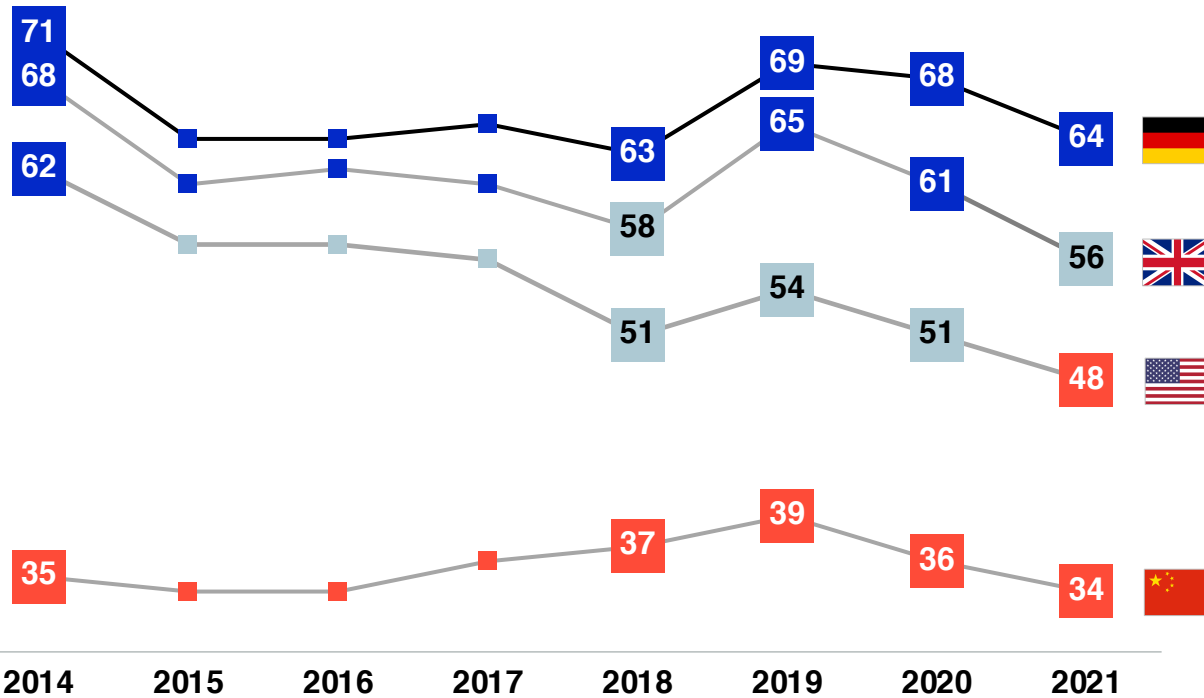


MOST POWERFUL COUNTRIES LOSE TRUST CAPITAL



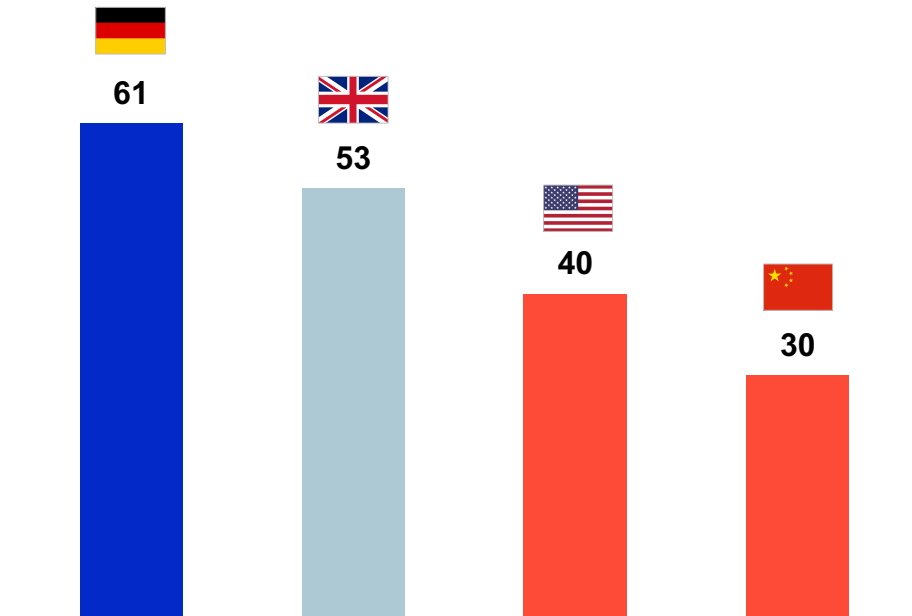
Percent trust in **companies** headquartered in each country

Global 22



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

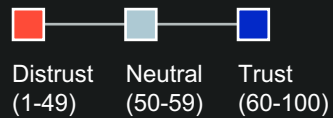
Global 27



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.

TRUST INEQUALITY SPREADS FURTHER

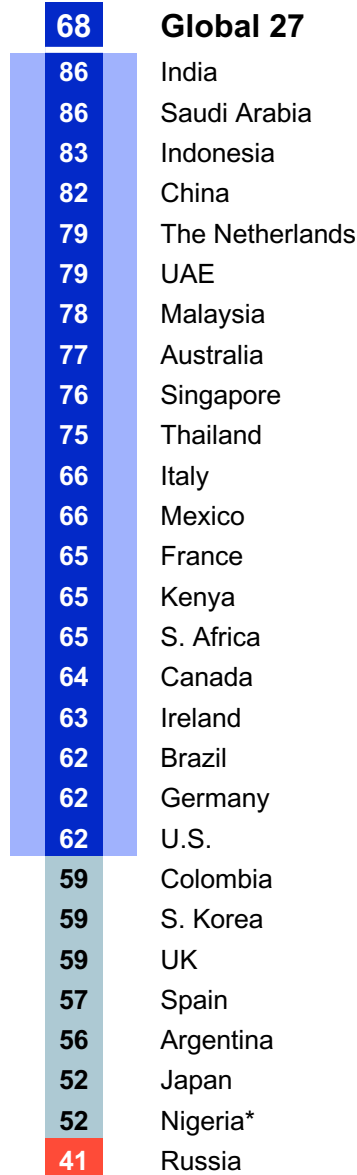
Trust Index



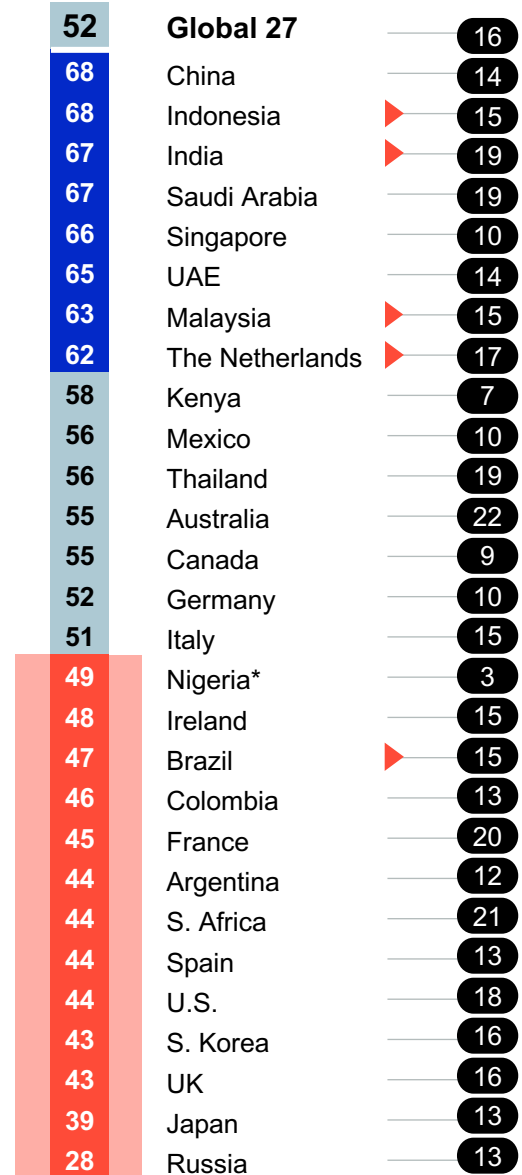
Mass population 16 points less trusting

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 not included in the global average

2021 Informed public



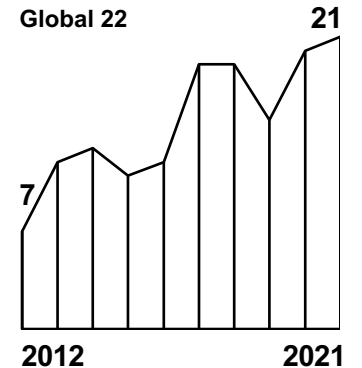
2021 Mass population | Trust gap



Record trust inequality

DOUBLE-DIGIT TRUST INEQUALITY IN RECORD NUMBER OF COUNTRIES

Nr. of countries with double-digit trust inequality





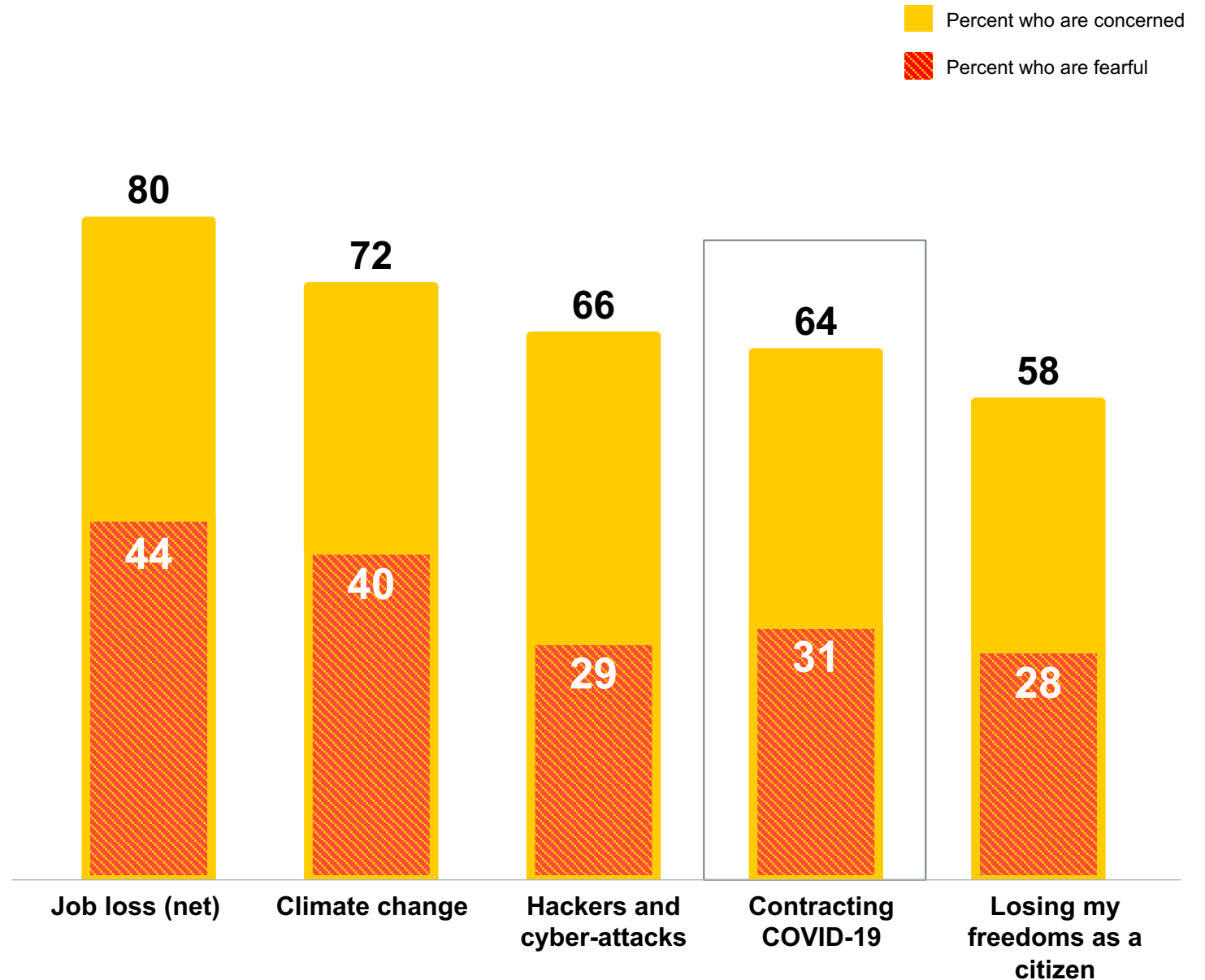
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PANDEMIC FURTHER FUELS FEARS

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PANDEMIC ADDED TO PERSISTENT PERSONAL AND SOCIETAL FEARS

Percent who are concerned, and percent who are fearful, in EU

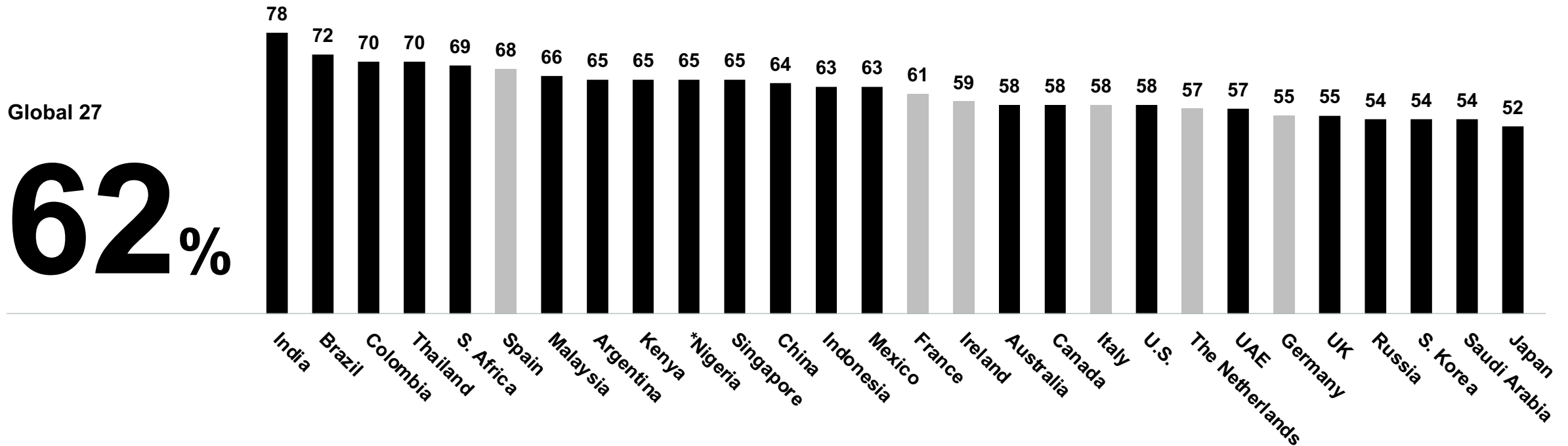


2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes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

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 not included in the global average

INCREASED URGENCY TO ADDRESS FOUNDATIONAL PROBLEMS

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

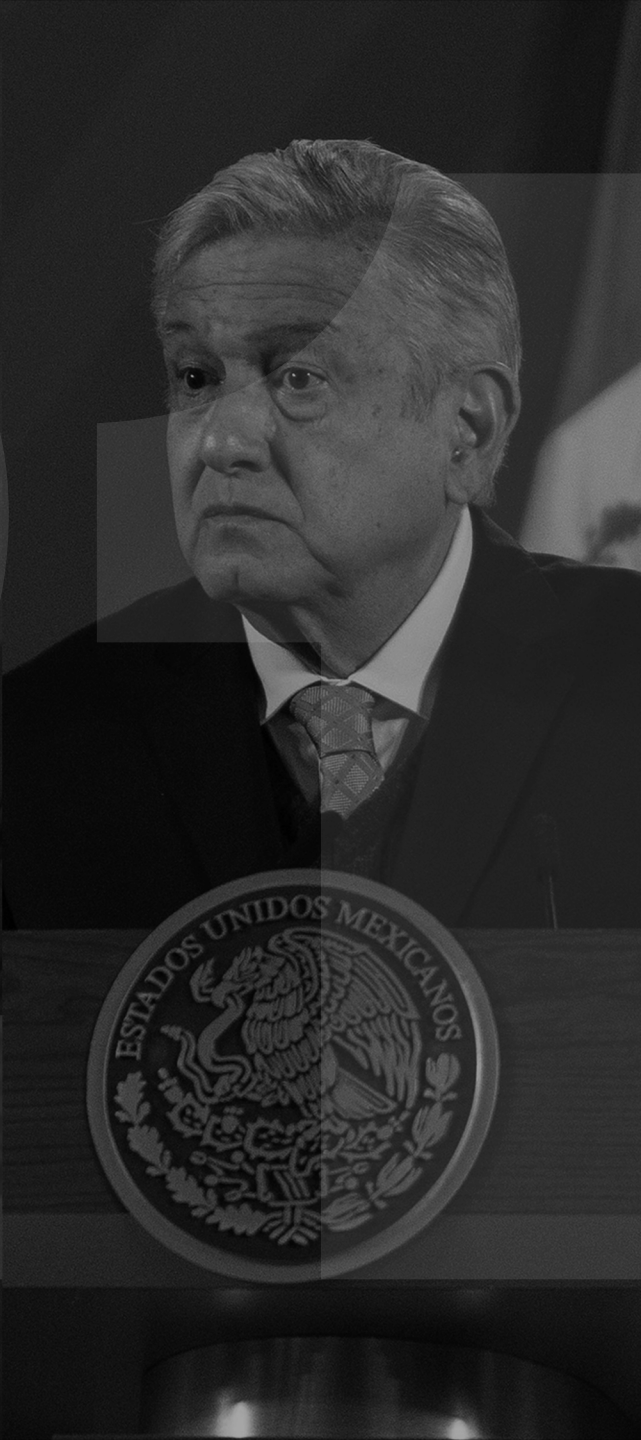
2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important;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

<i>Change in importance since last year, in EU</i>	Net change	More Important	Less Important
Improving our healthcare system	+63	69	6
Addressing poverty in this country	+49	57	8
Finding ways to combat fake news	+49	57	8
Improving our education system	+48	56	8
Closing the economic and social divide	+46	54	8
Addressing climate change	+45	55	10
Protecting people's individual freedoms	+45	53	8
Addressing discrimination, racism	+35	47	12

⊥

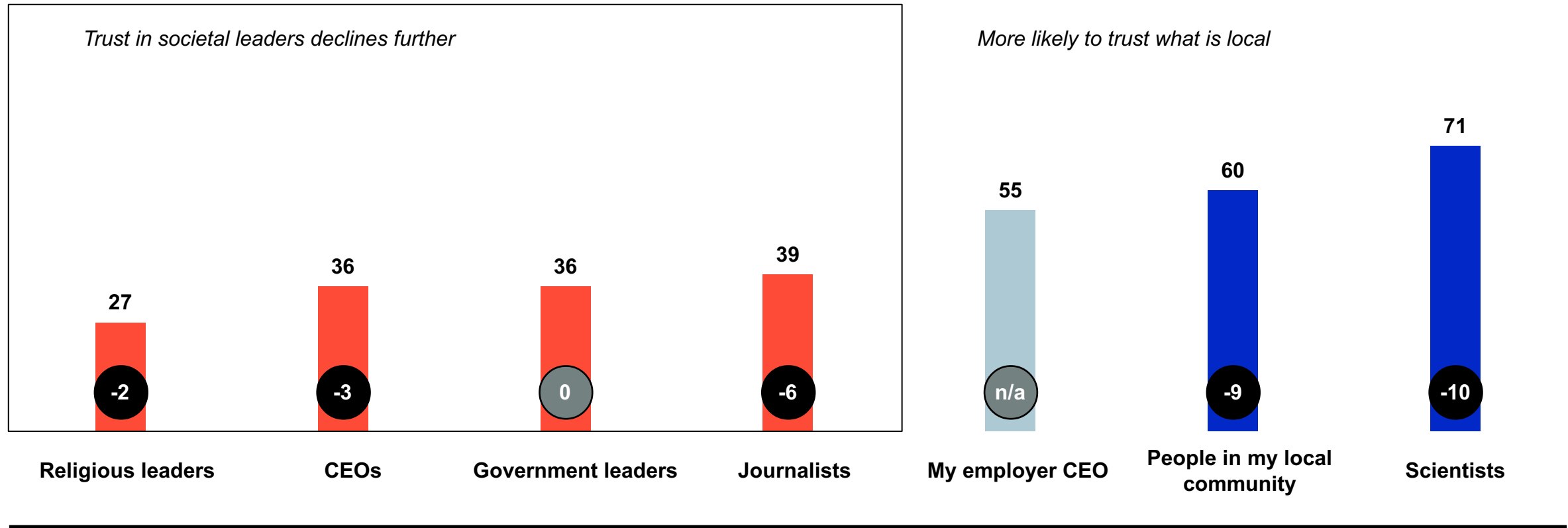
CRISIS OF LEADERSHIP

⊥



SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust, in EU



SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Percent who worry, in EU

Our government leaders
are **purposely trying to mislead**
people by saying things they know are false
or gross exaggerations

⊥

52%

Business leaders
are **purposely trying to mislead**
people by saying things they know are false
or gross exaggerations

⊥

53%



NO VACCINE

MY BODY

NEEDED

MY CHOICE

I HAVE

FAKE



AN

NEWS

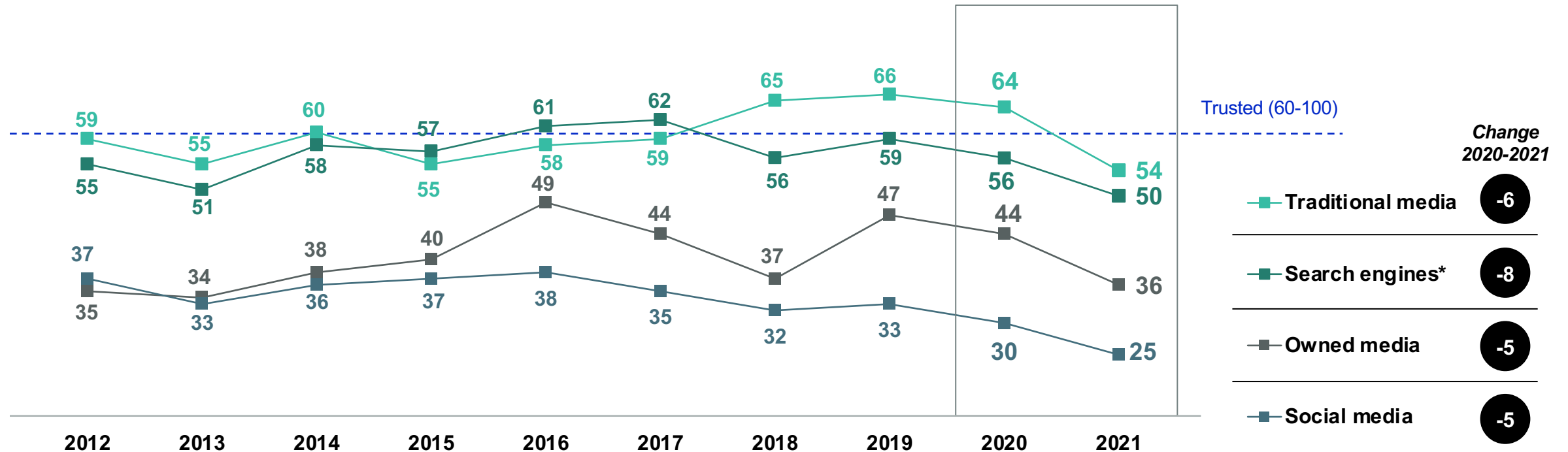
IMMUNE
SYSTEM

RTE

↑
RAGING INFODEMIC
FEEDS MISTRUST
↓

TRUST IN INFORMATION SOURCES NEAR RECORD LOWS

Percent trust in each source for general news and information, in EU



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, EU.

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

NEWS ORGANIZATIONS SEEN AS BIASED

Percent who agree, in EU

Journalists and reporters are **purposely trying to mislead** people by saying things they know are false or gross exaggerations

55%

Most **news organizations** are more concerned with **supporting an ideology** or political position than with informing the public

56%

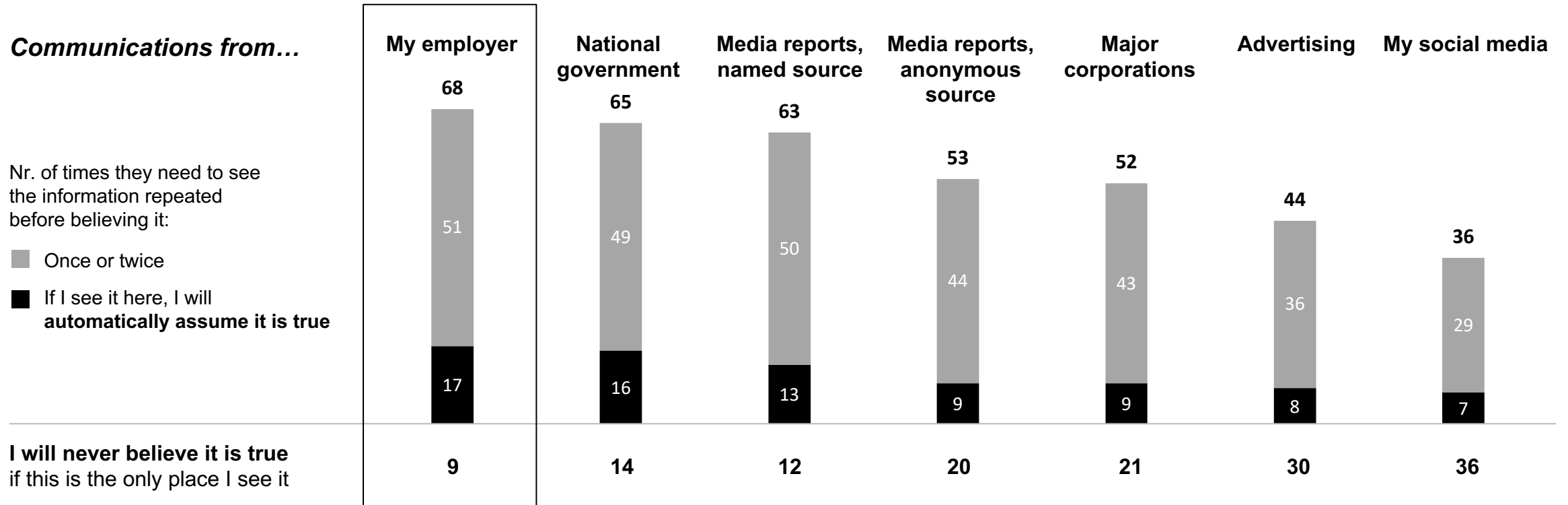
The media is **not** doing well at **being objective** and non-partisan

64%

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. Attributes shown to half of the sample. 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. 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 of the sample. General population, EU.

EMPLOYER MEDIA MOST BELIEVABLE

Percent who believe information from each source automatically, or after seeing it twice or less, in EU



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, EU. "Employer communications" only shown to those that are an employee (Q43/1).

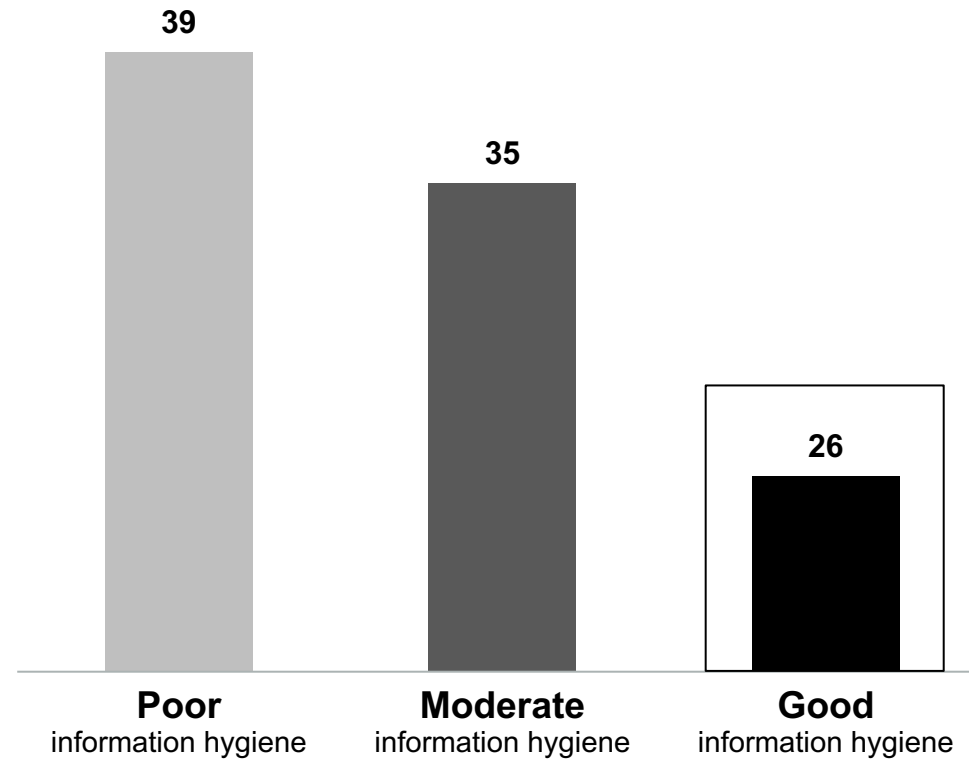


IN EU, ONLY 1 IN 4 HAVE GOOD INFORMATION HYGIENE

Percent in each segment

Information hygiene:

1. News engagement
2. Avoid information echo chambers
3. Verify information
4. Do not amplify unvetted information



50% of respondents **share or forward news items** that they find to be interesting.

Of those, **only 30%** have good information hygiene



+

HIGH STAKES FOR PUBLIC HEALTH AND THE ECONOMY

T

VACCINE HESITANCY REMAINS A MAJOR HURDLE

Percent who say they will take the COVID-19 vaccine within the next year

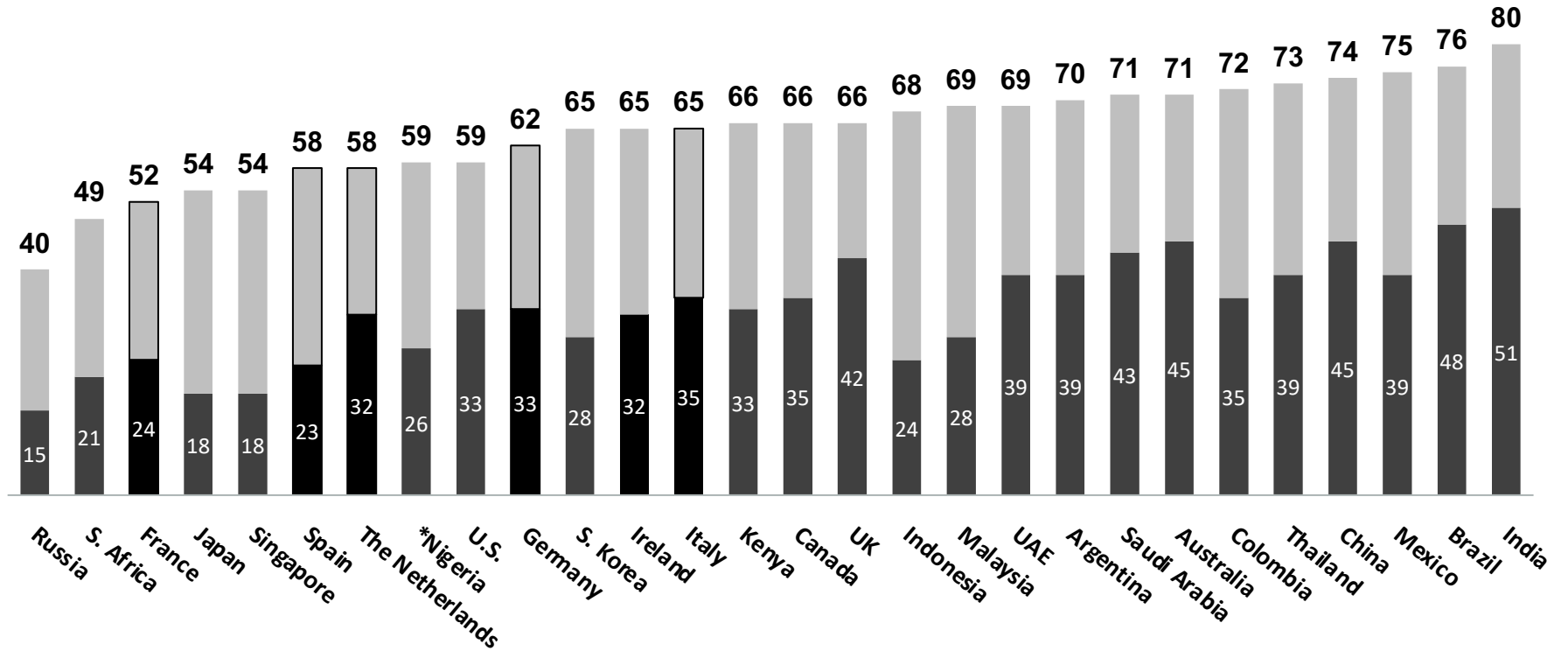
Global 27

64%

Willing to vaccinate...

31	Six months to one year
33	As soon as possible

Only 1 in 3 ready to take the vaccine as soon as possible



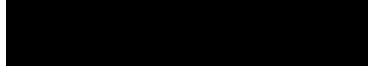
2021 Edelman Trust Barometer. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half of the sample. General population, 27-mkt avg. *Nigeria not included in the global average


PANDEMIC FEARS IMPEDE RETURN TO WORKPLACE

Percent who say each reason is why they are choosing to work from home vs. choosing to return to the workplace, in EU

51% choosing **to work at home**,
for the following reasons:

49% choosing to **return to the office**,
for the following reasons:


COVID-19 risk while commuting/in office (net)  **50**

My employer made me feel safe  **32**

I am more productive  **27**

I am more productive  **31**

Enhanced work-life balance  **35**

Healthy work-life balance  **19**

2021 Edelman Trust Barometer. WRK_CHOICE. Which of the following best describes your current working situation? Question asked of those who are an employee (Q43/1). Data among employees that have a choice of working from home or their workplace. 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, EU. COVID-19 risk while commuting / in office is a net of WHY_HOME/2-3.



⊥

A NEW MANDATE FOR BUSINESS

⊥



IMAGINE

BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Percent who agree, in EU

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

⊥
63%

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

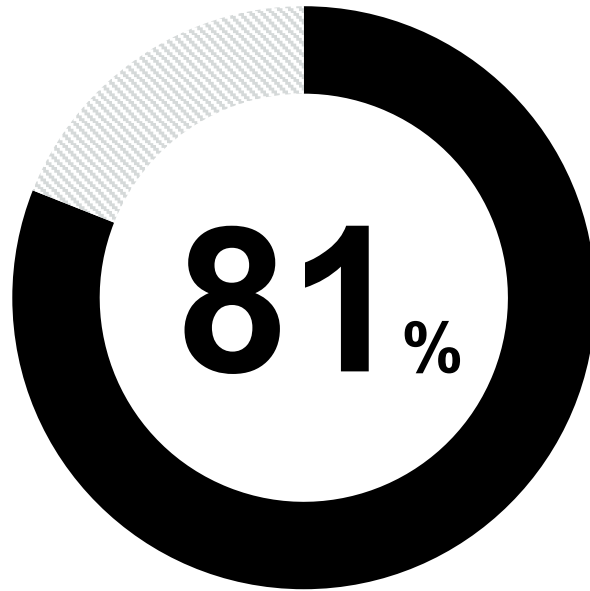
⊥
60%

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

⊥
63%

CEOS MUST LEAD ON SOCIETAL ISSUES

Percent in EU who expect **CEOs to publicly speak out** about one or more of these societal challenges



Pandemic impact	58
Job automation	43
Societal issues	35
Local community issues	34

EMPLOYEE EXPECTATIONS SHIFT: SAFETY AND UPSKILLING MATTER MORE

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

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, EU. Net change is the difference between more and less important.

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

	Net change	More Important	Less Important
Keep workers, customers safe	+44	53	9
Regular employee communications	+37	47	10
Job skills training programs	+33	44	11
Diverse, representative workforce	+28	39	11

CONSUMERS AND EMPLOYEES EXPECTED TO HAVE A SEAT AT THE TABLE

Percent who agree, in EU

69%

Consumers ...

**have the power to force
corporations to change**

59%

Employees ...

46% of those who
are employed

I am more likely now than a year
ago to voice my objections to
management or **engage in
workplace protest**

EMERGING FROM INFORMATION BANKRUPTCY

1

Business: Embrace expanded mandate

CEOs must lead on issues from sustainability and systemic racism to upskilling. Act first, talk after.

2

Lead with facts, act with empathy

Societal leaders must have the courage to provide straight talk, but also empathize and address people's fears.

3

Provide trustworthy content

All institutions must provide truthful, unbiased, reliable information.

4

Don't go it alone

Business, government, NGOs and others must find a common purpose and take collective action to solve societal problems.



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