#TrustBarometer



FIORELLA PASSONI CEO EDELMAN ITALIA

HUGH TAGGART
Co-CEO EDELMAN UK







21st ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online survey in 28 countries*
33,000+ respondents

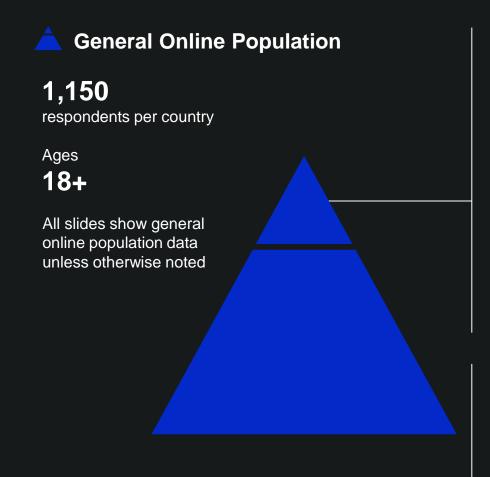
2021 Edelman Trust Barometer fieldwork conducted from October 19 to November 18, 2020

*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).





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	20 07	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 Plummets	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



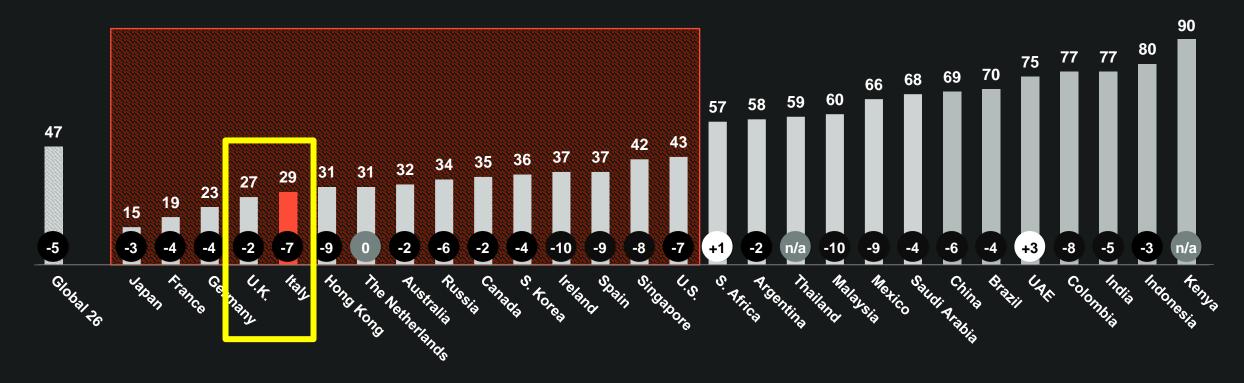
PESSIMISTIC ABOUT ECONOMIC PROSPECTS

Percent who believe they and their families will be better off in five years' time



Majority pessimistic in 15 of 28 markets

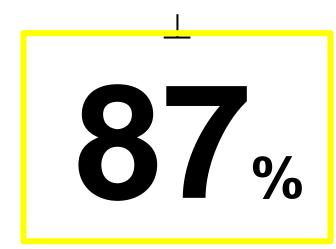
 \perp

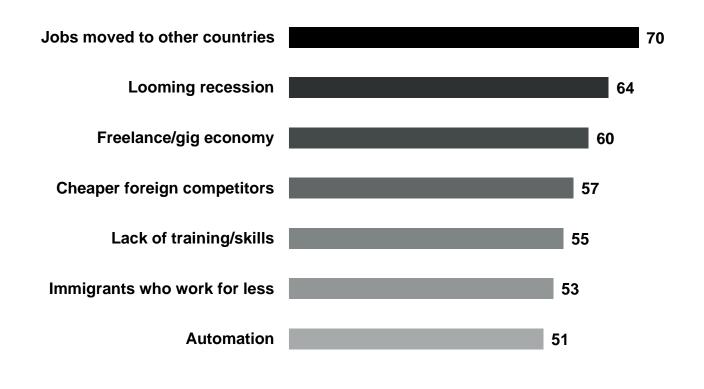


WORRY ABOUT THE FUTURE OF WORK

Percent of employees in Italy who worry about job loss due to each issue

I worry about **losing my job**due to one or more of these causes





JOB LOSS FEARS INTENSIFYING

Percent who are worried about losing their job due to each reason

Highest job loss worry in each market

Second-highest job loss worry

Third-highest job loss worry

	Gig-economy	Looming recession	Lack of training/skills	Foreign competitors	Immigration	Automation	Job moved abroad
Argentina	61	65	57	55	54	51	46
Australia	60	51	51	49	48	45	41
Brazil	64	67	68	56	52	58	54
Canada	56	49	50	42	43	45	36
China	65	62	67	59	56	63	59
Colombia	74	74	69	69	74	65	60
France	65	54	54	51	52	55	49
Germany	51	45	43	42	41	40	46
Hong Kong	60	52	58	46	49	50	44
India	82	80	81	79	80	77	77
Indonesia	61	58	61	58	56	57	52
Ireland	57	55	50	45	42	39	10
Italy	60	64	55	57	53	51	70
Japan	44	37	45	38	44	38	10
Kenya	64	64	63	58	49	52	49
Malaysia	70	71	67	73	71	69	61
Mexico	71	71	67	64	59	60	59
Russia	49	60	49	38	43	34	27
Saudi Arabia	47	48	44	46	45	41	44
Singapore	67	67	66	64	67	59	60
S. Africa	61	70	63	53	55	51	45
S. Korea	60	69	57	58	50	63	44
Spain	68	66	65	62	58	57	58
Thailand	68	76	67	66	67	65	60
The Netherlands		34	38	36	38	35	29
UAE	62	65	63	62	64	59	VV
<mark>U.K.</mark>	53	52	49	46	44	46	43
U.S.	55	49	51	42	47	46	TV

WORRY CHANGE DUE TO **TECHNOLOGY** IS OUT OF CONTROL

Percent in Italy who agree

The pace of change in technology is **too fast**

I worry technology will make it impossible to know if **what people are seeing or hearing is real** Government does not understand emerging technologies enough to regulate them effectively

Trust in technology 2019-2020

Global 26

France

-4

Largest declines in:

-10

Canada, Italy, Russia, Singapore

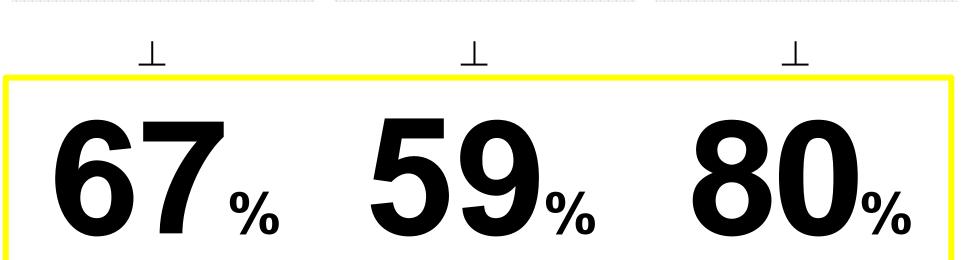
-8

U.S.

-7

Australia

-6



2020 Edelman Trust Barometer. CNG_POC. For the statements below, please think about the pace of development and change in society today and select the response that most accurately represents your opinion. 9-point scale; top 4 box, fast. Italy. 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. Italy. PER_GOV. How well do you feel the government is currently doing each of the following? 5-point scale; bottom 3 box, not doing well (data excludes DK responses). Italy. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. 26-mkt avg. All questions asked of half of the sample among the general population.



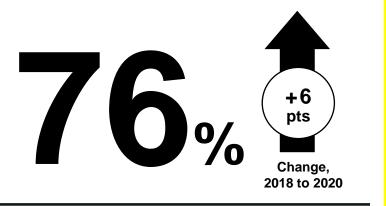
WORRY ABOUT QUALITY OF INFORMATION

Percent in Italy who agree

The media I use are **contaminated** with untrustworthy information

I worry about false information or **fake** news being used as a weapon



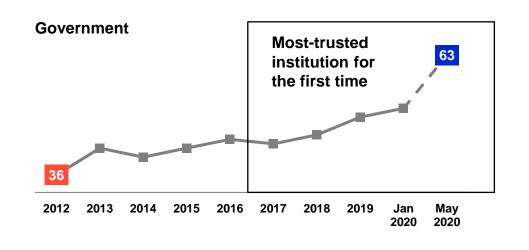


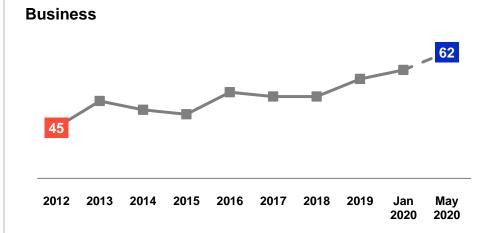


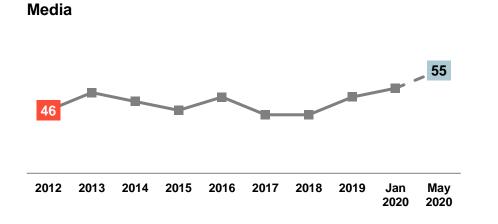
RECORD HIGHS FOR ALL INSTITUTIONS

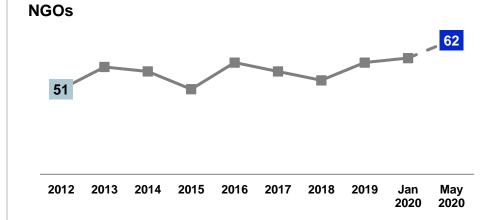


Percent trust (10-market average)







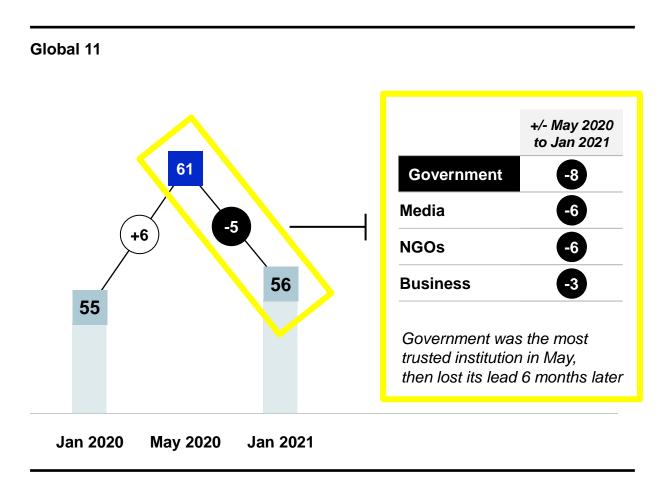




SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

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





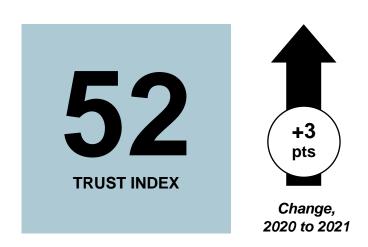
Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	47
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	4
Saudi Arabia	+5	•
France	+13	+2

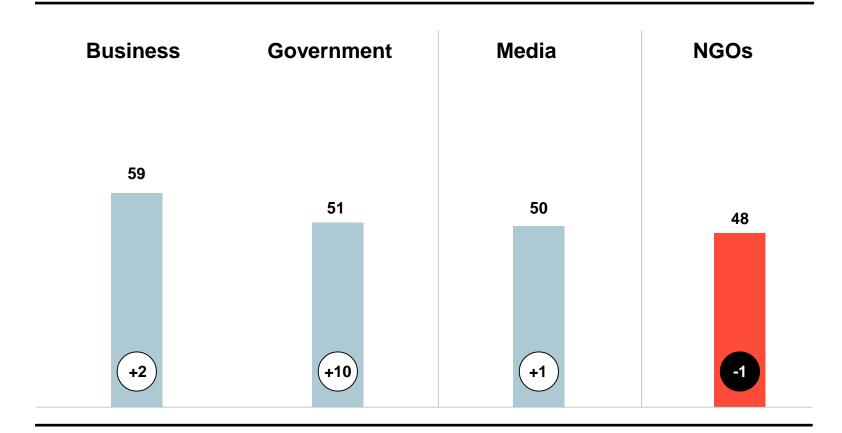
IN ITALY, TRUST IN GOVERNMENT RISES YEAR-ON-YEAR

Percent trust, in Italy

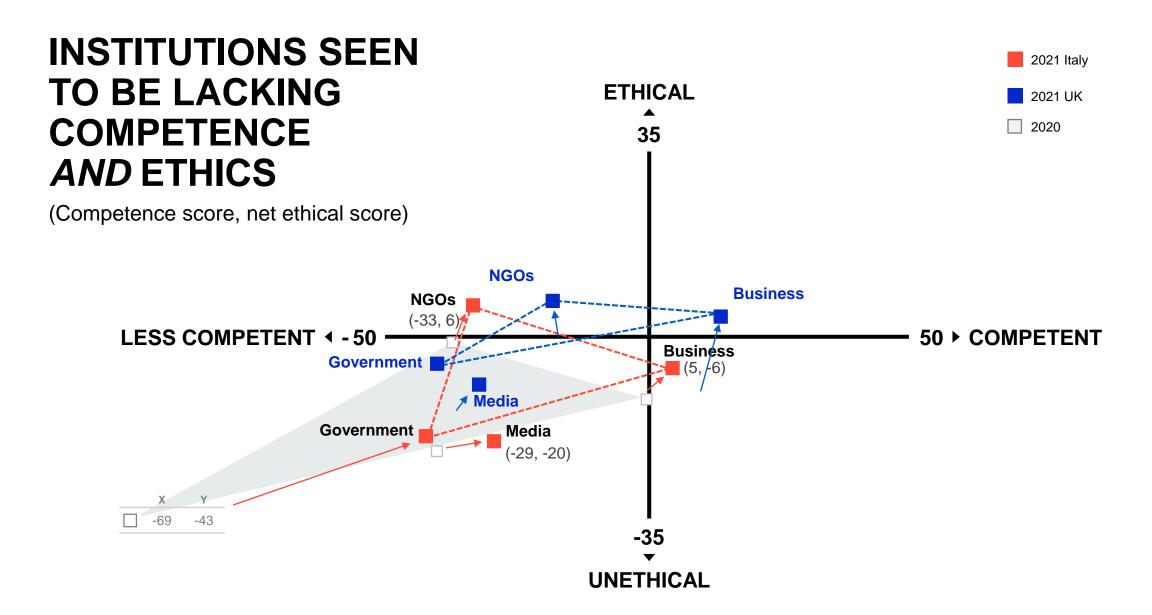








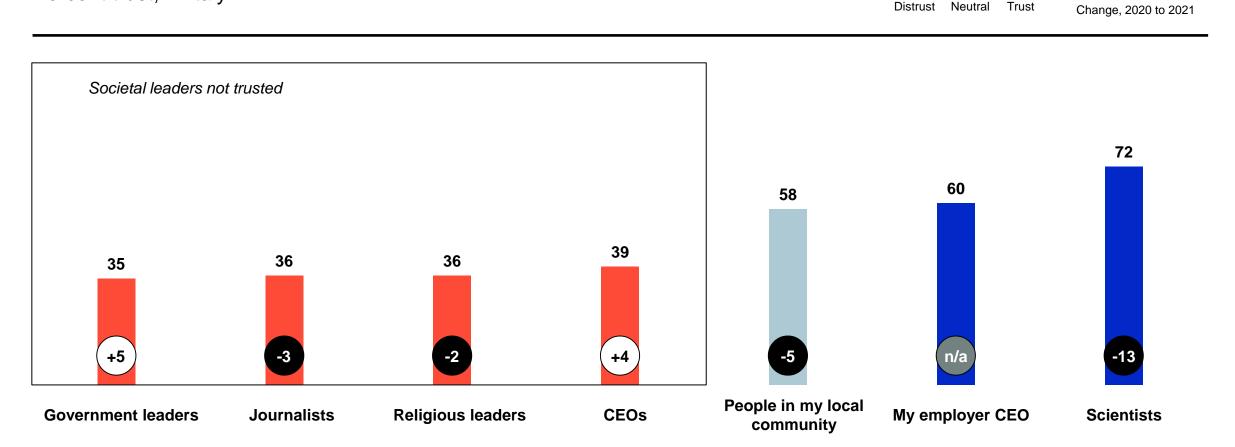






SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust, in Italy







TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

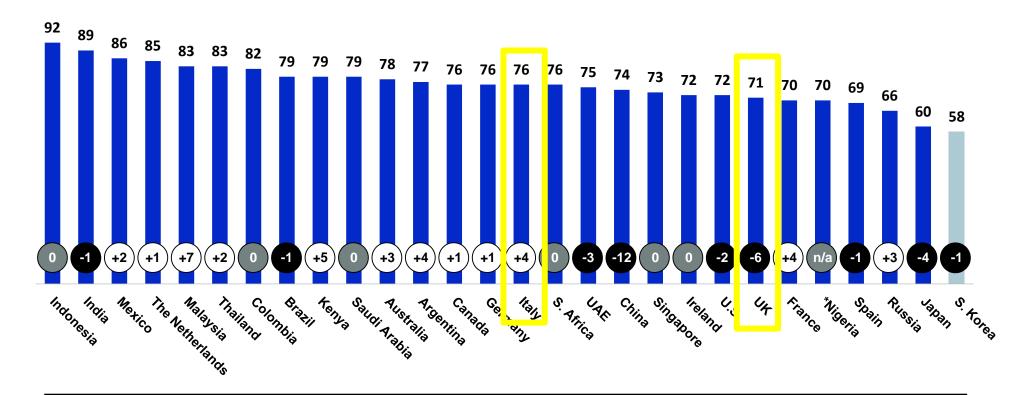


Percent trust in my employer

Italy



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



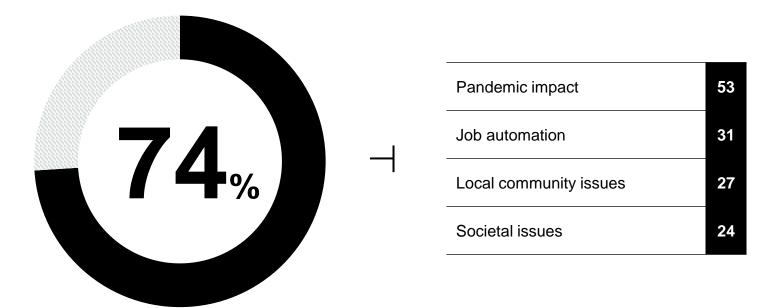






CEOS MUST LEAD ON SOCIETAL ISSUES

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





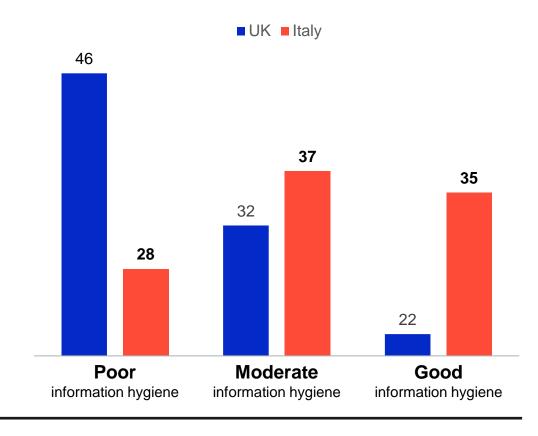
NO VACCINE MY BODY NEEDED MYCHOICE RAGING INFODEMIC
FEEDS MISTRUST IMMUNE SYSTEM

FEW PEOPLE PRACTICE 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



Globally, **only 26%** of the total population have good information hygiene.





INDUSTRY SECTORS OVER TIME

Percent trust in each sector, in Italy



Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend
Technology	79	72	78	77	78	79	78	78	70	69	-10
Healthcare	-	-	-	-	50	54	57	59	61	66	n/a
Food and beverage	67	59	63	64	64	64	62	65	62	65	-2
Consumer packaged goods	62	55	58	59	57	62	60	62	59	61	-1
Entertainment	-	58	66	66	64	65	66	68	64	59	n/a
Telecommunications	61	53	57	60	60	62	57	61	56	58	-3
Automotive	56	54	63	64	54	63	58	66	61	57	+1
Energy	58	49	54	56	56	59	62	62	57	54	-4
Financial services	32	26	32	36	40	41	43	41	41	42	+10





INDUSTRY SECTORS OVER TIME

Percent trust in each sector, in the UK



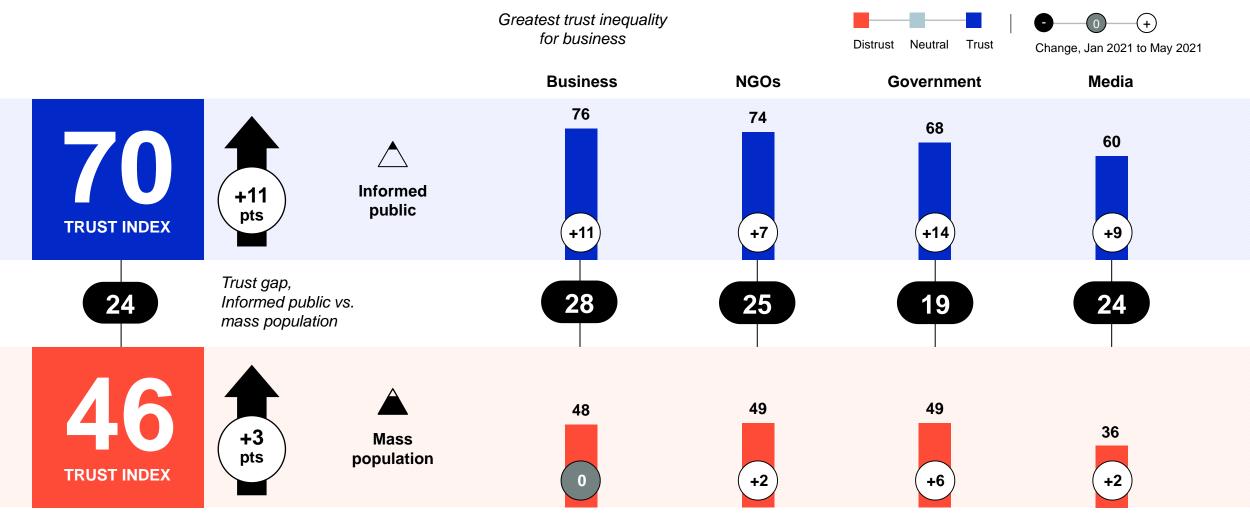
Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend	
Healthcare	-	-	-	-	68	70	68	71	69	68	n/a	
Food and beverage	64	68	70	68	64	68	62	68	66	59	-5	
Technology	71	71	74	72	69	69	64	69	64	56	-15	Trust in technology at an all-time low; not trusted for
Entertainment	-	64	68	69	64	63	55	67	61	54	n/a	the first time
Telecommunications	51	57	57	56	52	56	54	61	58	54	+3	
Automotive	55	61	64	63	45	57	49	60	55	50	-5	
Consumer packaged goods	55	61	63	63	59	60	53	57	55	50	-5	
Financial services	29	35	37	36	41	45	46	51	47	47	+18	Trust in the financial services
Energy	29	37	31	37	43	47	43	50	46	46	+17	and energy sectors reach record highs





DOUBLE-DIGIT TRUST GAPS ACROSS INSTITUTIONS

Percent trust, in the UK



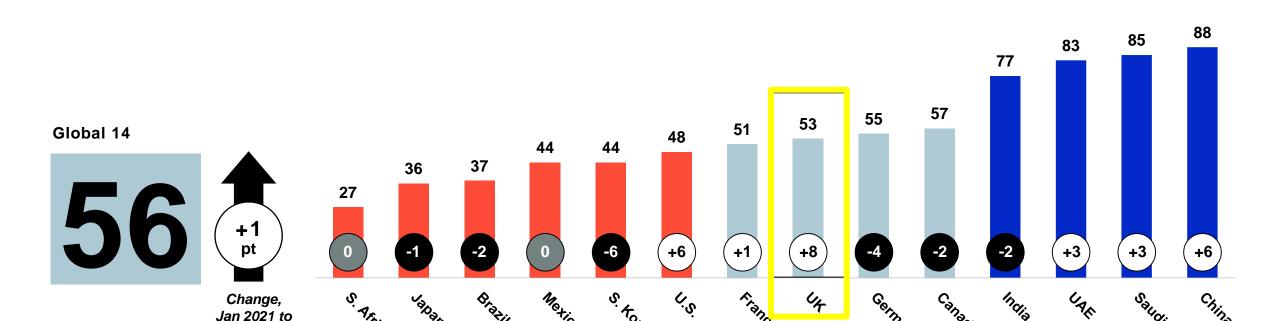




DESPITE GAINS, GOVERNMENT STILL NOT TRUSTED IN THE UK

Percent trust

May 2021



Change, Jan 2021 to May 2021

Trust

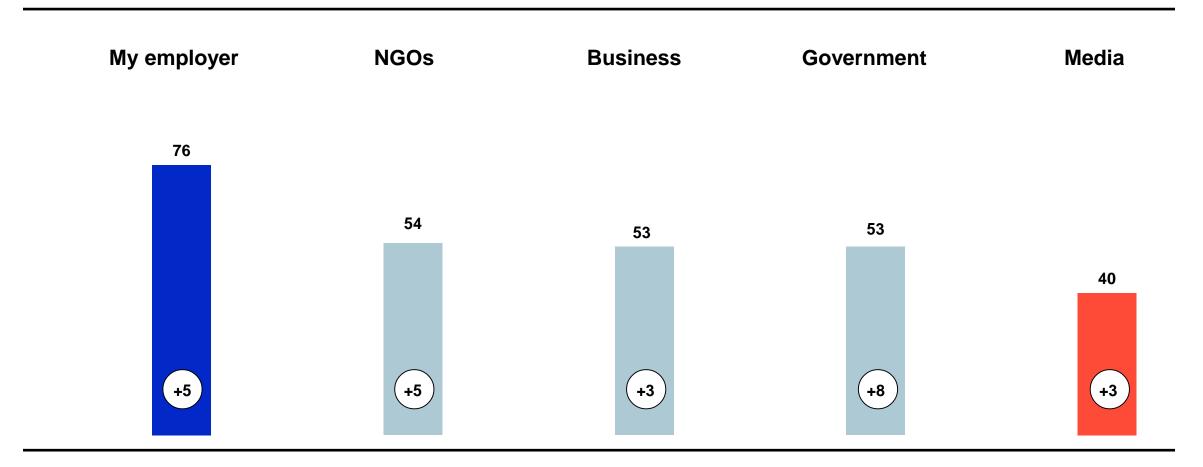
Neutral

Distrust

MY EMPLOYER ONLY TRUSTED INSTITUTION

Percent trust, in the UK







12 OF 14 COUNTRIES STILL IN PANDEMIC MINDSET

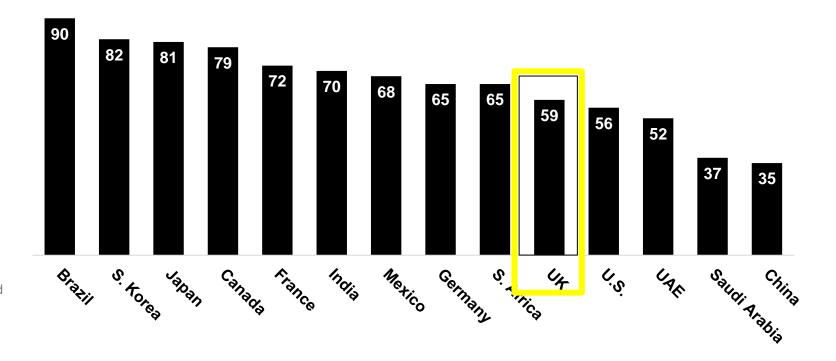
Which best describes how you are feeling?

Global 14

65% I am still in a pandemic mindset

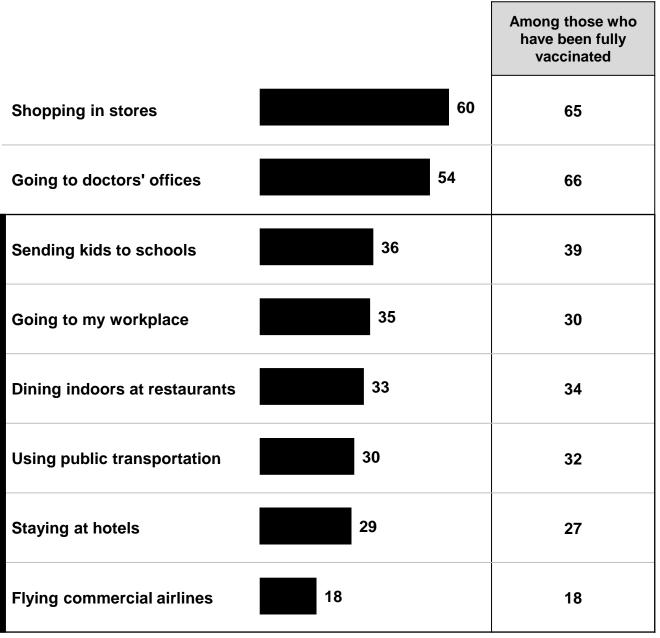
VS

I feel that the pandemic is largely behind us and I am taking advantage of every opportunity I can to get back to my prepandemic life as quickly as possible



EVEN THE VACCINATED DO NOT FEEL SAFE RESUMING NORMAL ACTIVITIES

Which would or do you feel safe doing right now? In the UK

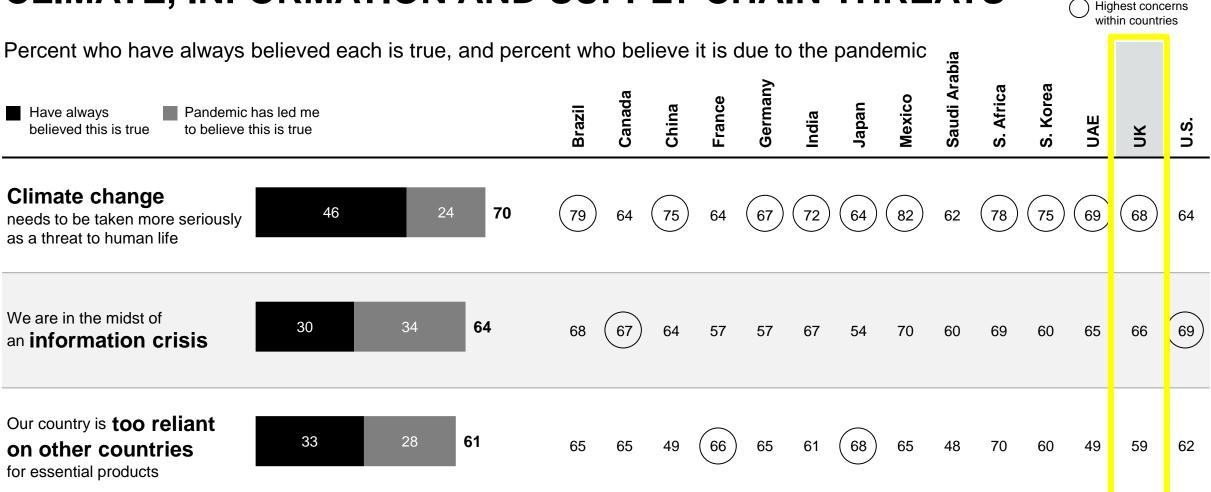


Vaccination does not confer peace of mind about resuming normal activities



2021 Edelman Trust Barometer Spring Update: A World in Trauma. SAFE. Which of the following would you, or do you, feel safe doing right now. Pick all that apply. General population, UK, and by those who are "fully vaccinated" (VACCINE4/1).

PANDEMIC FALLOUT: MORE PEOPLE NOW ALARMED BY CLIMATE, INFORMATION AND SUPPLY CHAIN THREATS

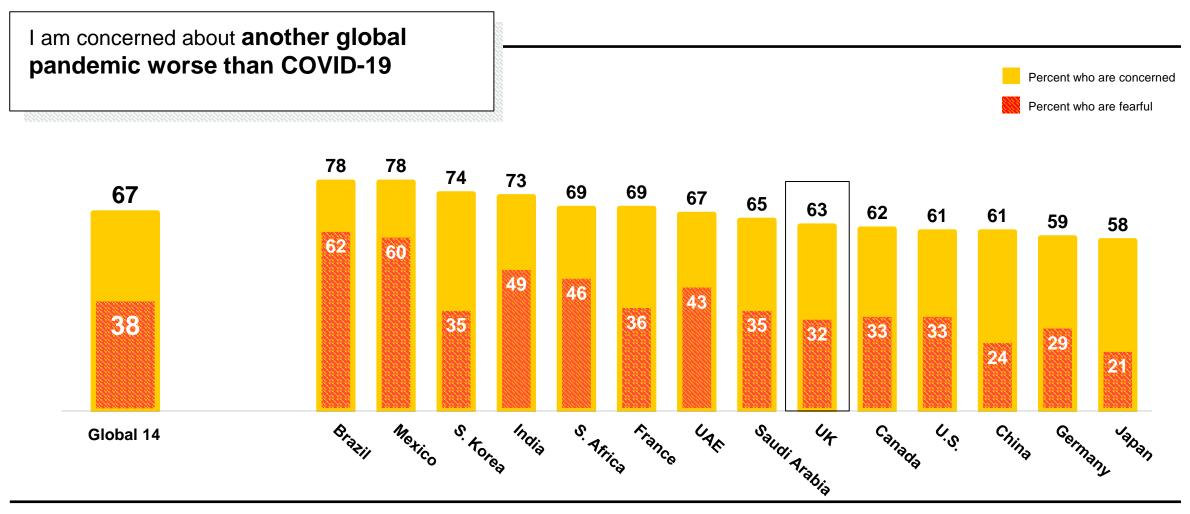


2021 Edelman Trust Barometer Spring Update: A World in Trauma. LESSONS. Living through a global pandemic can give people a new perspective on things. For each of the items listed below, please indicate if this is something you felt was true before the pandemic began, something that the pandemic has led you to believe is true, or something that the pandemic has led you to believe is no longer true. 4-point scale; code 1, always believed to be true; code 2, believe to be true because of the pandemic. General population, 14-mkt avg. Data on the right is a sum of codes 1 and 2.



NEARLY 7 IN 10 FEAR ANOTHER PANDEMIC

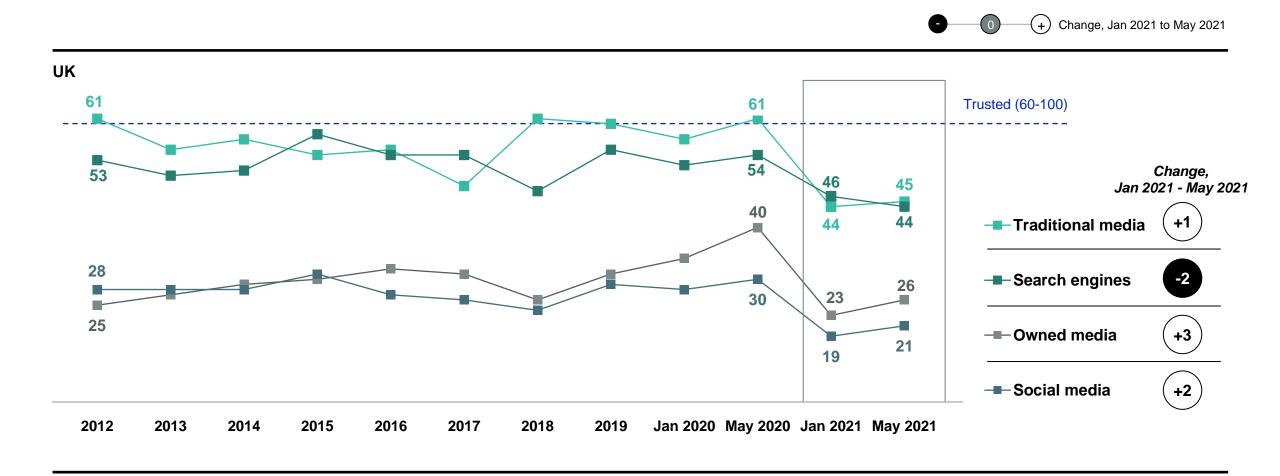
Percent who are concerned



NO VACCINE MY BODY NEEDED MYCHOICE NO END TO THE INFODEMIC NEWS IMMUNE SYSTEM

CONTINUED LOW TRUST IN NEWS SOURCES

Percent trust in each source for general news and information, in the UK



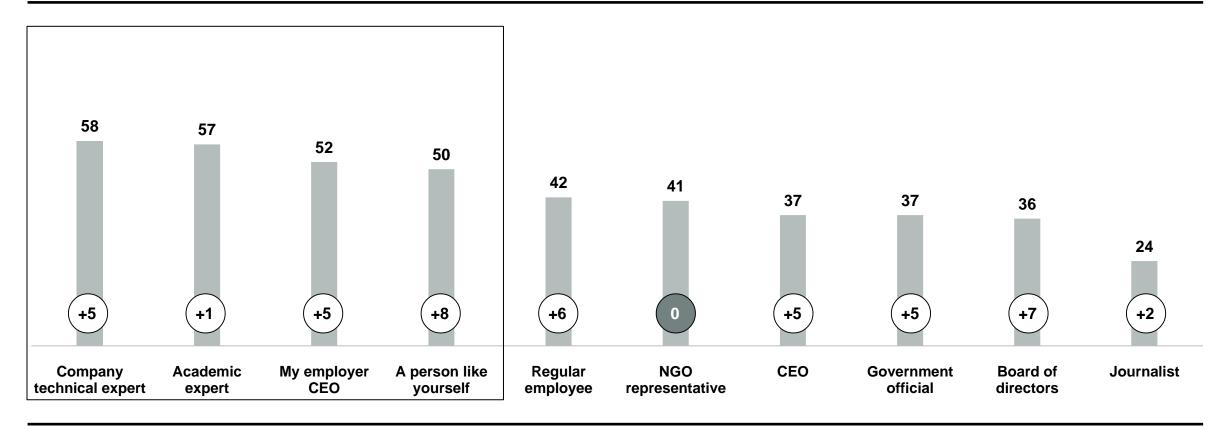




EXPERTS, EMPLOYER CEOS, PEERS MOST CREDIBLE SPOKESPEOPLE

Percent who rate each as very/extremely credible as a source of information **about a company**, in the UK



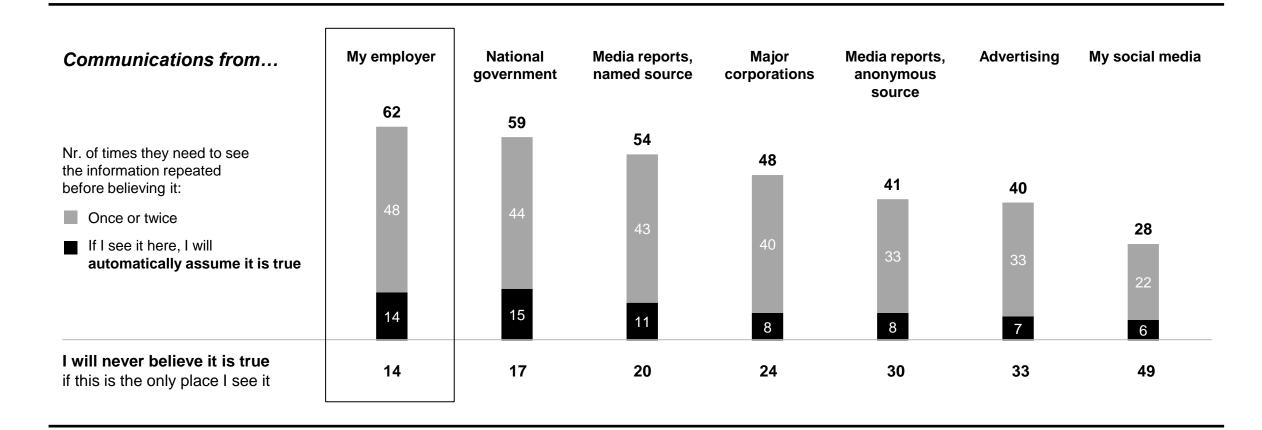






EMPLOYER MEDIA MOST BELIEVABLE

Percent who rate each as very/extremely credible as a source of information **about a company**, in the UK





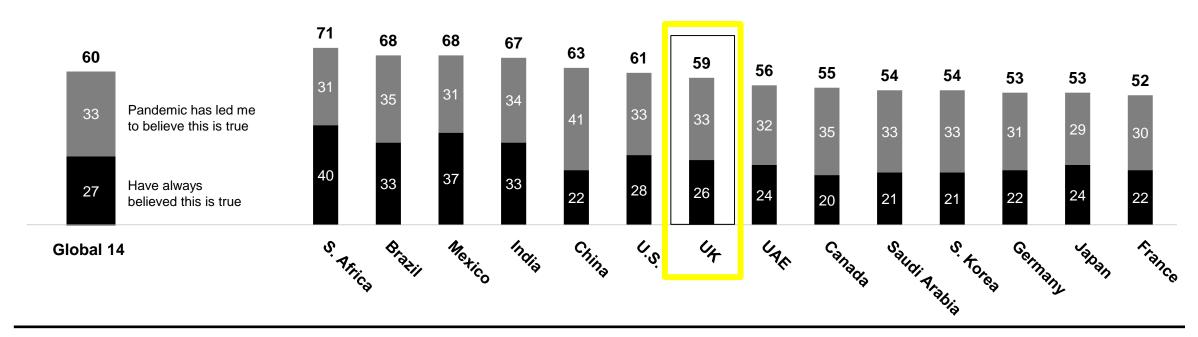




PRESSURE MOUNTS FOR BUSINESS TO TAKE ON SOCIETAL CHALLENGES

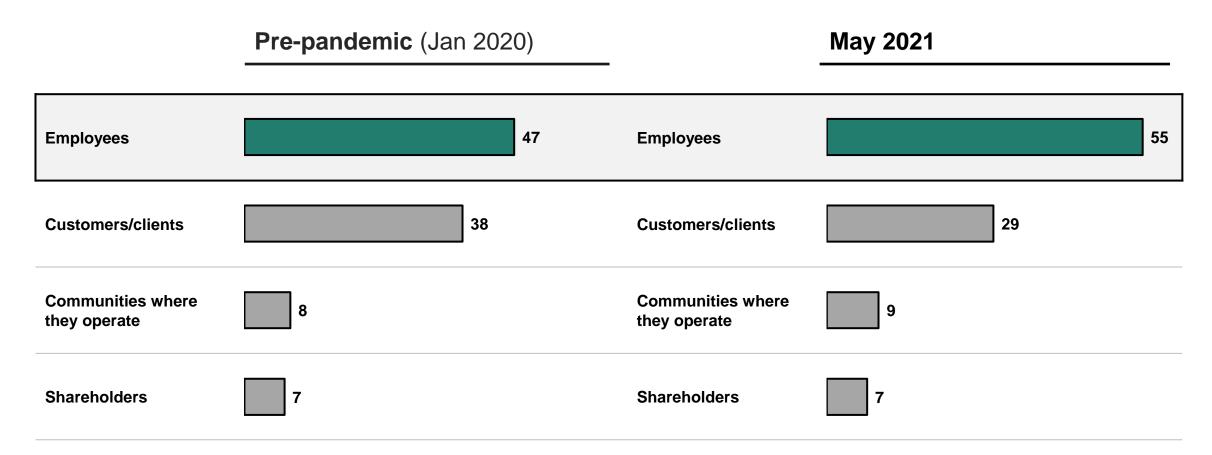
Percent who have always believed this is true, and percent who believe it is due to the pandemic

Our country will not be able to overcome our challenges without business' involvement



EMPLOYEES REMAIN MOST IMPORTANT STAKEHOLDER

Percent who ranked each group as most important to a company achieving long-term success, in the UK

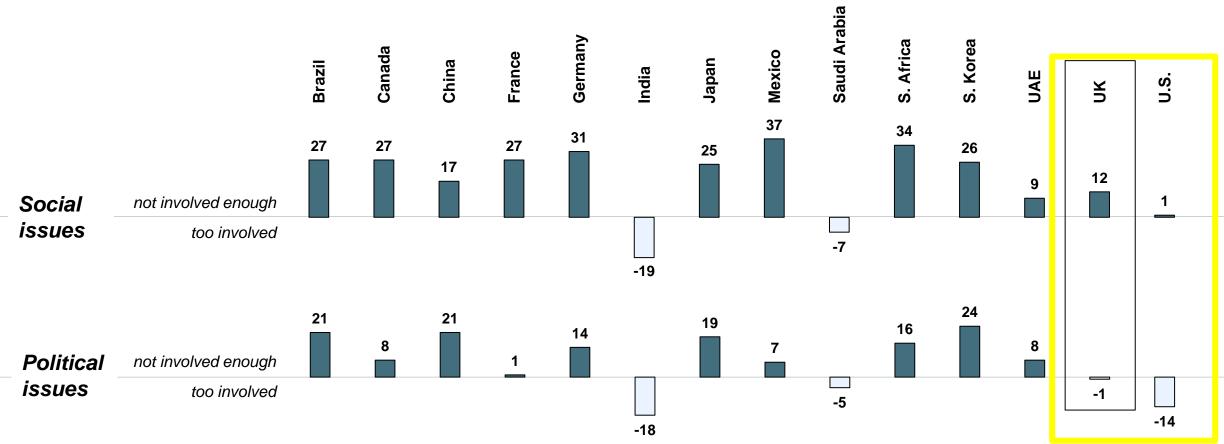






IN THE UK, MORE SUPPORT FOR CEOS TO PRIORITISE SOCIAL THAN POLITICAL ISSUES

Percentage point difference between those who say CEOs are not involved enough vs. too involved in social and political issues



2021 Edelman Trust Barometer Spring Update: A World in Trauma. CEO_ENGAGES. In general, how would you characterize CEOs' current level of involvement in social issues? Question asked of half of the sample. CEO_ENGAGEP. In general, how would you characterize CEOs' current level of involvement in political issues? Question asked of half of the sample. General population, by market.

PANDEMIC UNLOCKS **OPPORTUNITY FOR A BETTER FUTURE**

Which do you agree more? In the UK

Nothing good will come from this pandemic. It will ruin lives, further divide us as a society, and drain resources that could have been used to address other social problems.

36%

As horrible as it is. this pandemic will lead to valuable innovations and changes for the better in how we live, work and treat each other

64%

Percent in the UK who say each is a positive change they believe will result from the pandemic

Greater preparedness for future pandemics	59
Improvements to our healthcare system	51
Innovations around how we work	50
More attention on climate change	34
Accelerated development of technologies	32

TOWARD A POST-PANDEMIC WORLD

1

Business: Embrace expanded mandate

CEOs must lead on issues from sustainability and systemic racism to upskilling. But beware the pedestal: business can't solve all societal problems on its own.

2

Lean on your experts

People are losing trust in leaders, but technical experts provide a valuable voice to business. Lean on them to provide trustworthy content and drive information hygiene.

3

Employees are job one

Business must prioritize employees, their most important stakeholder.

4

Provide trustworthy content

All institutions must provide truthful, unbiased, reliable information.