

Spring Update:
A World in Trauma



2021 Edelman Trust Barometer

Spring Update: A World in Trauma

Methodology



Online survey in 14 countries:

Brazil, Canada, China, France, Germany, India, Japan, Mexico, Saudi Arabia, S. Africa, S. Korea, UAE, UK, and U.S.

16,800+ respondents total

All fieldwork was conducted between April 30 and May 11, 2021

January 2021 Trust Barometer fieldwork was conducted between October 19 and November 18, 2020

14-market global data margin of error: General population +/- 0.8% (n=16,800), informed public +/- 2.6% (n=1,400), mass population +/- 0.8% (n=13,633).

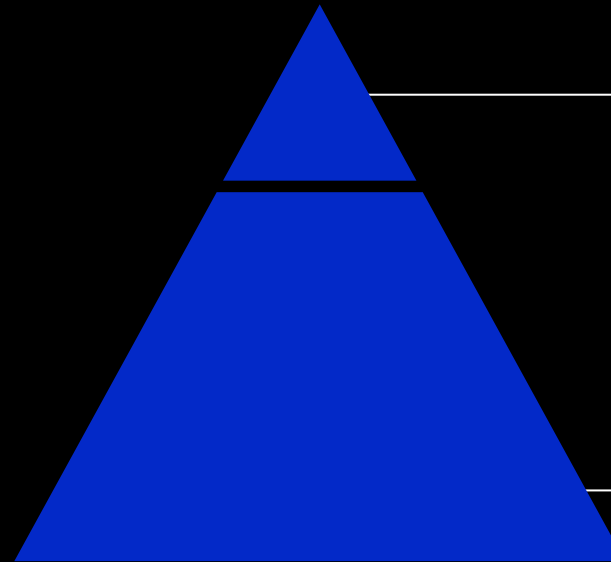
Market-specific data margin of error: General population +/- 2.8% (n=1,200), informed public +/- 9.8% (n=100), mass population +/- 3.0% to 3.7% (n=min 708, varies by market).

General Online Population

1,200
respondents
per country

Ages
18+

All slides show general
online population data
unless otherwise noted



Informed Public

100 respondents in each country

Represents **19%** of total global population

Must meet 4 criteria

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

Mass Population

All population not including informed public

Represents **81%** of total global population

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STATE OF TRUST: AN UNEQUAL RECOVERY

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DOUBLE-DIGIT TRUST INEQUALITY IN 13 OF 14 COUNTRIES

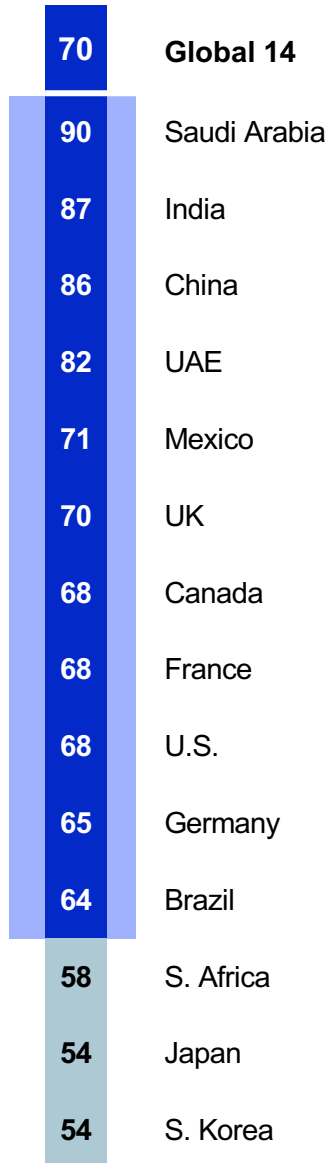
Trust Index

Informed public 17 points more trusting than the mass population

Double-digit trust inequality in 13 of 14 countries measured

2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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, 14-mkt avg.

△ 2021 Spring Update
Informed public



▲ 2021 Spring Update
Mass population | Trust gap

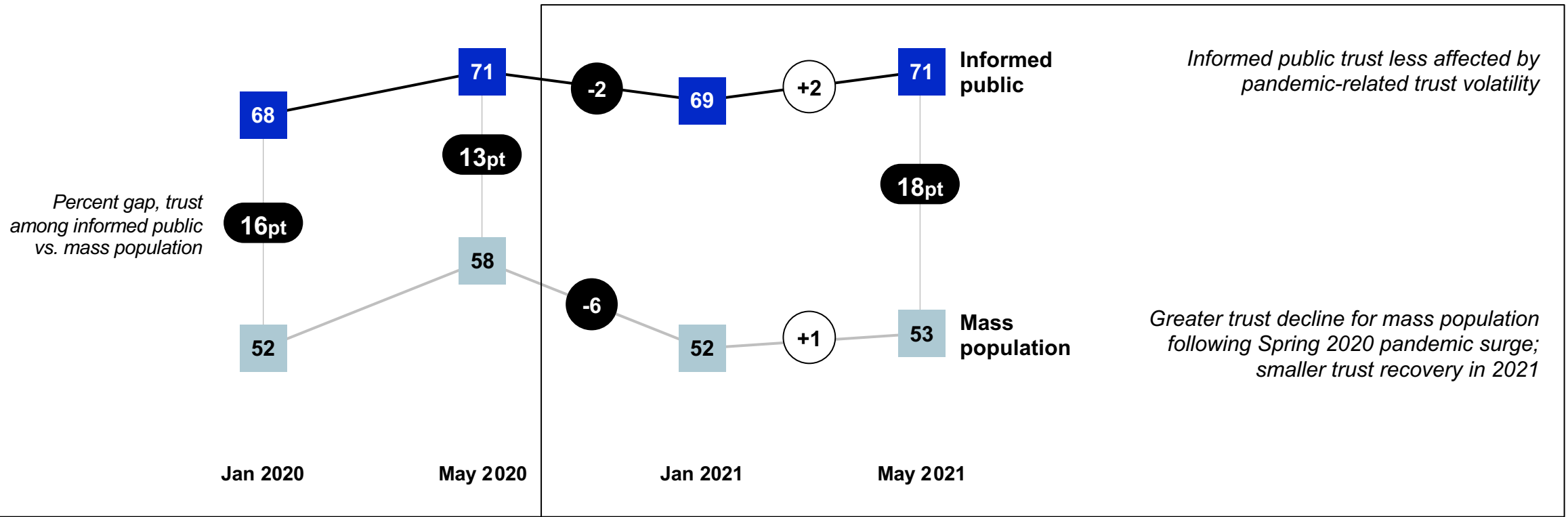


▶ 4 countries with record trust inequality

A DEEPENING TRUST GAP

Percent trust

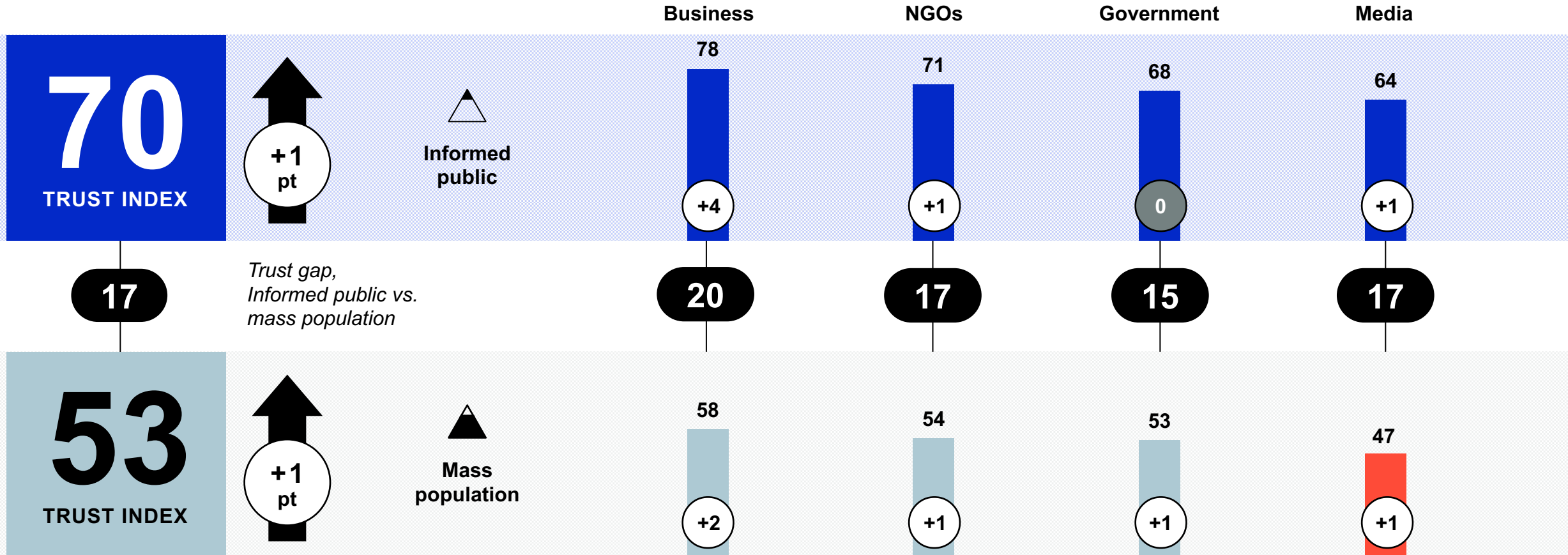
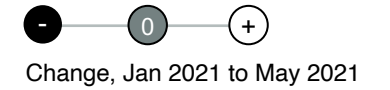
Global 11



DOUBLE-DIGIT TRUST GAPS ACROSS INSTITUTIONS

Percent trust

Greatest trust inequality for business



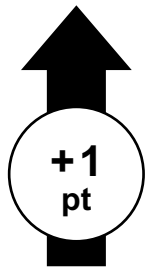
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GOVERNMENT NOT TRUSTED IN 10 OF 14 COUNTRIES

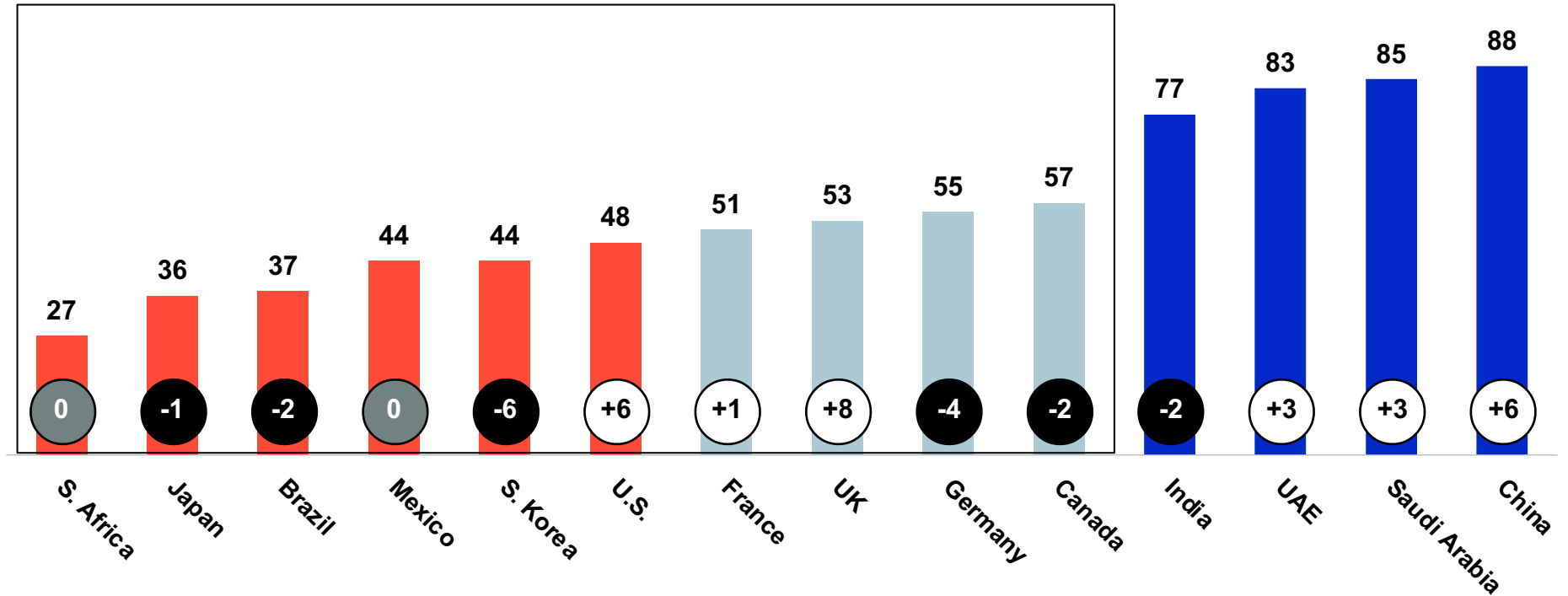
Percent trust



Global 14



Change,
Jan 2021 to
May 2021



MY EMPLOYER MOST TRUSTED INSTITUTION

Percent trust



My employer



Business



NGOs



Government



Media



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PANDEMIC LEGACY: A WORLD AWASH IN FEAR

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12 OF 14 COUNTRIES STILL IN PANDEMIC MINDSET

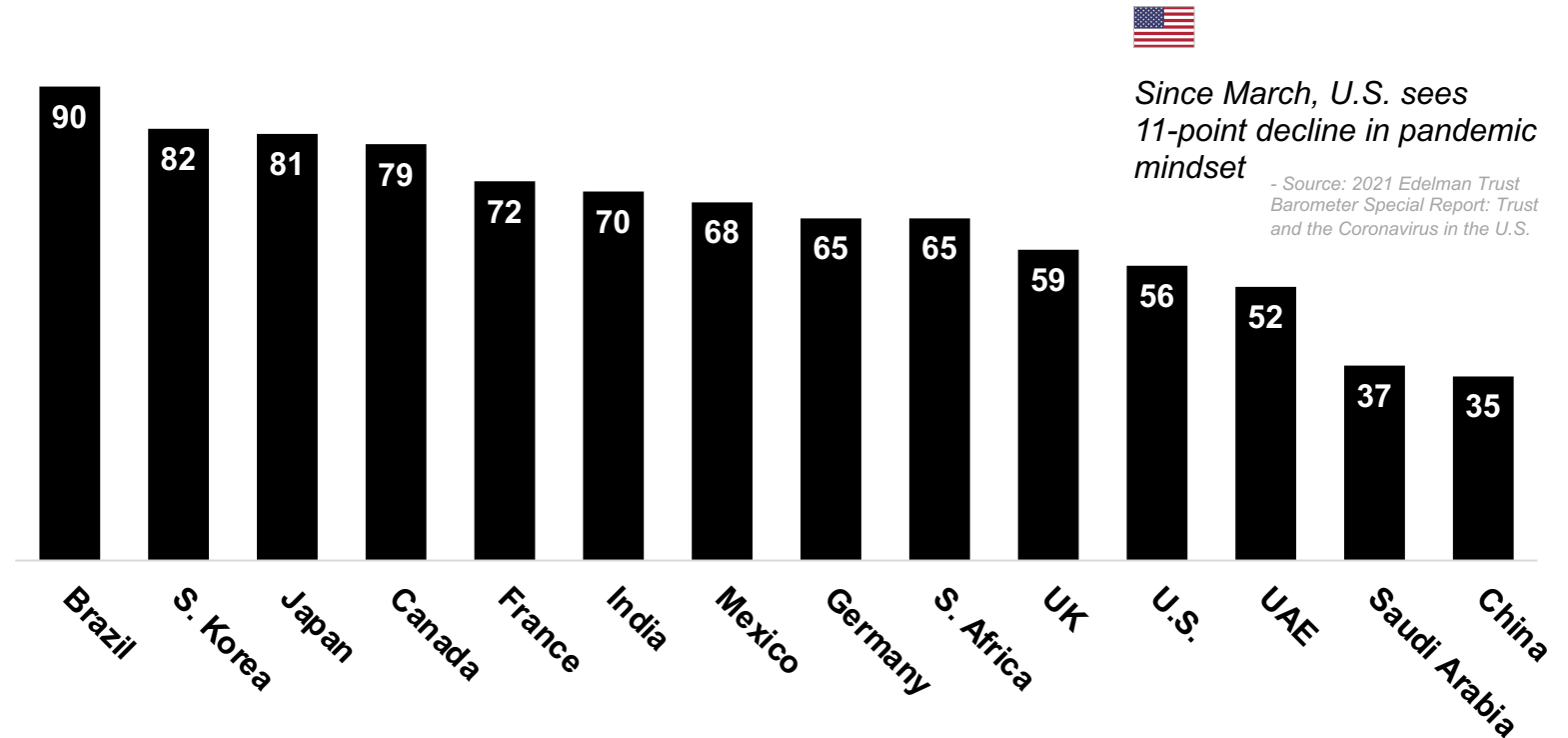
Which best describes how you are feeling?

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 pre-pandemic 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?

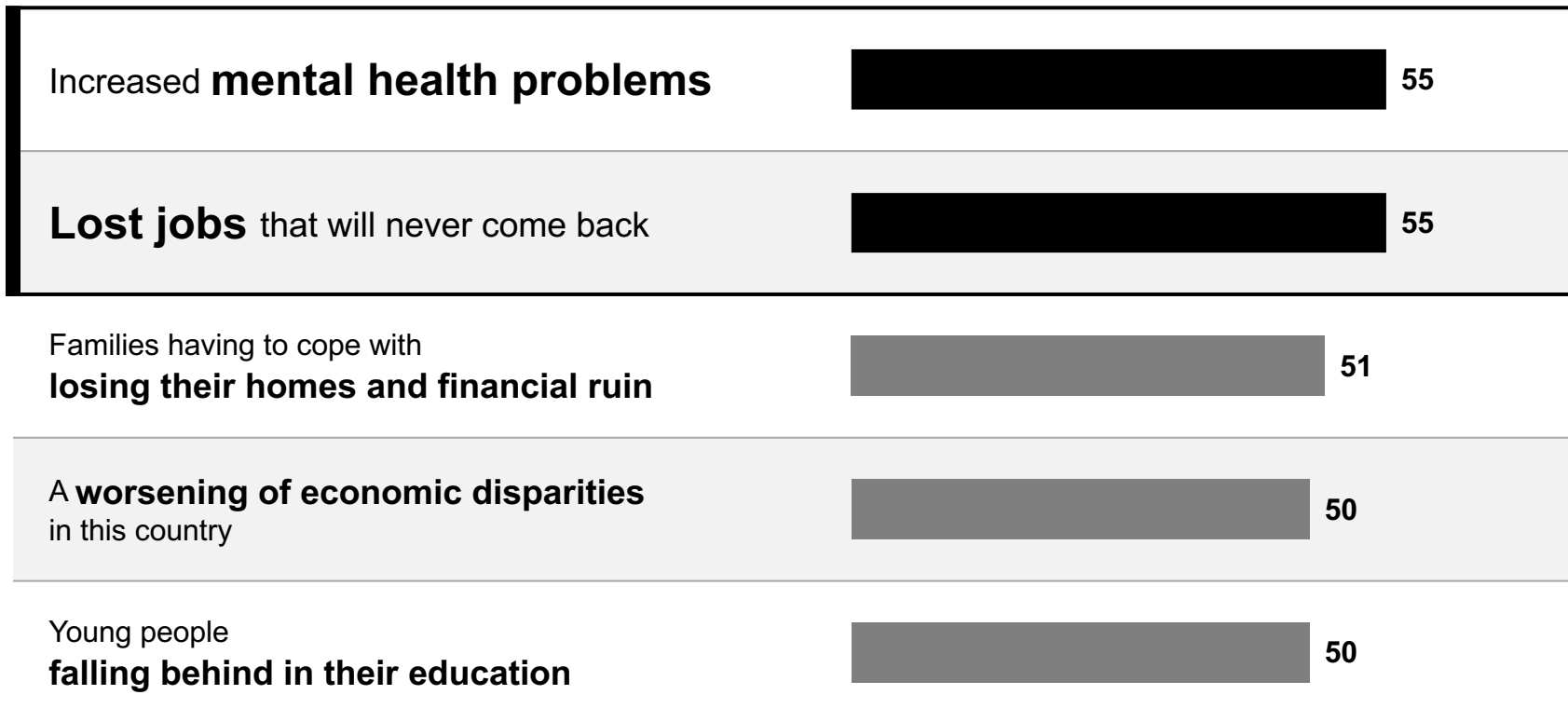
2021 Edelman Trust Barometer Spring Update: A World in Trauma. SAFE. Which of the following would you, or do you, feel safe doing right now. Pick all that apply. General population, 14-mkt avg., and by those who are "fully vaccinated" (VACCINE4/1).

		Among those who have been fully vaccinated
Shopping in stores	48	52
Going to doctors' offices	43	50
Going to my workplace	34	37
Dining indoors at restaurants	28	35
Staying at hotels	23	29
Sending kids to schools	22	25
Using public transportation	19	22
Flying commercial airlines	16	22

Vaccination does not confer peace of mind about resuming normal activities

PANDEMIC FALLOUT: TWIN CRISES OF MENTAL HEALTH AND JOB LOSS

Percent who believe each will be among the worst negative consequences of the pandemic



2021 Edelman Trust Barometer Spring Update: A World in Trauma. WORSE. The pandemic is likely to have some lasting negative impacts on the lives of individuals and on our society as a whole. Which of the following do you believe will be among the worst long-term, negative consequences of the pandemic in addition to all of the lives lost? Pick all that apply. Question asked of half of the sample. General population, 14-mkt avg. "All of the above" added to each response.

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

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

■ Have always believed this is true ■ Pandemic has led me to believe this is true

Climate change

needs to be taken more seriously as a threat to human life



We are in the midst of an information crisis



Our country is too reliant on other countries for essential products



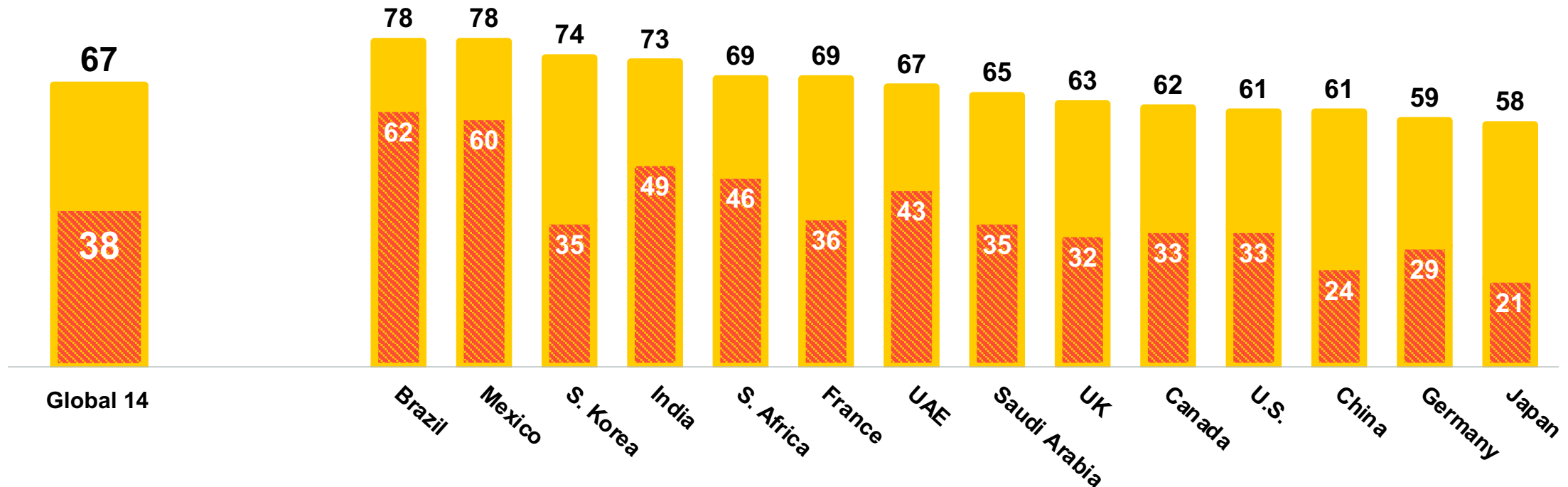
2021 Edelman Trust Barometer Spring Update: A World in Trauma. LESSONS. Living through a global pandemic can give people a new perspective on things. For each of the items listed below, please indicate if this is something you felt was true before the pandemic began, something that the pandemic has led 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.

NEARLY 7 IN 10 FEAR ANOTHER PANDEMIC

Percent who are concerned

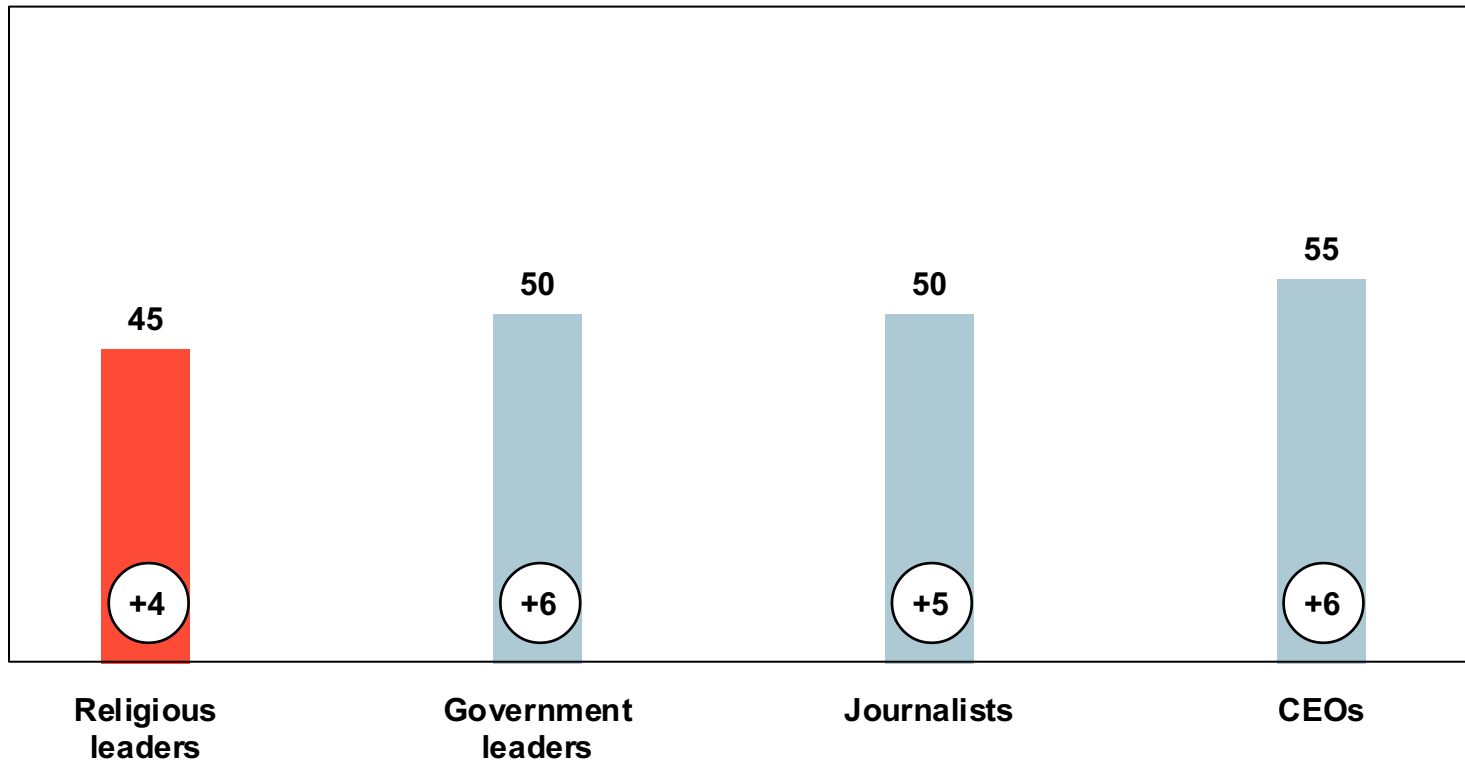
I am concerned about **another global pandemic worse than COVID-19**

■ Percent who are concerned
■ Percent who are fearful

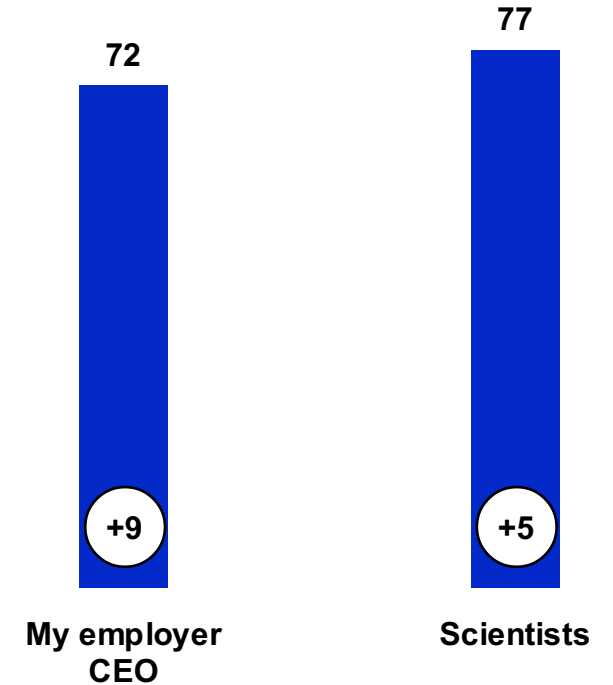


KEY SOCIETAL LEADERS NOT TRUSTED

Percent trust



*My employer CEO
only trusted societal leader*



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NO END TO THE INFODEMIC

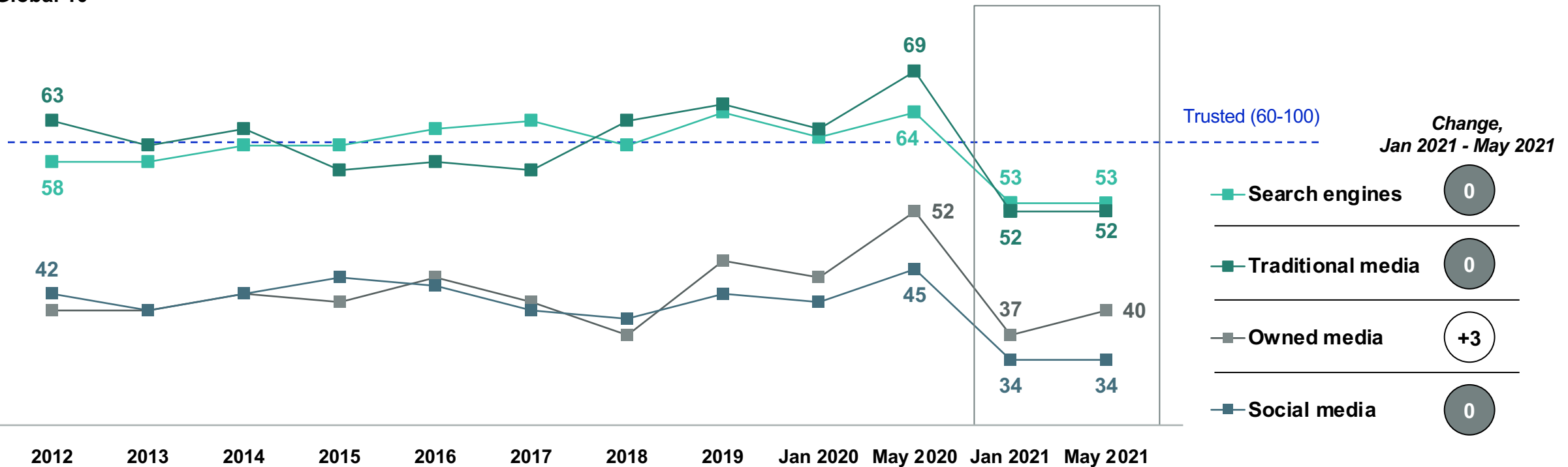
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TRUST IN NEWS SOURCES STILL AT RECORD LOWS; ONLY OWNED MEDIA GAINS IN TRUST

Percent trust in each source for general news and information

● 0 ● + Change, Jan 2021 to May 2021

Global 10



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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, 10-mkt avg. *From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

MEDIA FAILS TO IMPROVE INFORMATION QUALITY

Percent who believe each media source to be doing a good job in reducing misleading and false information

○ Lowest performance within countries

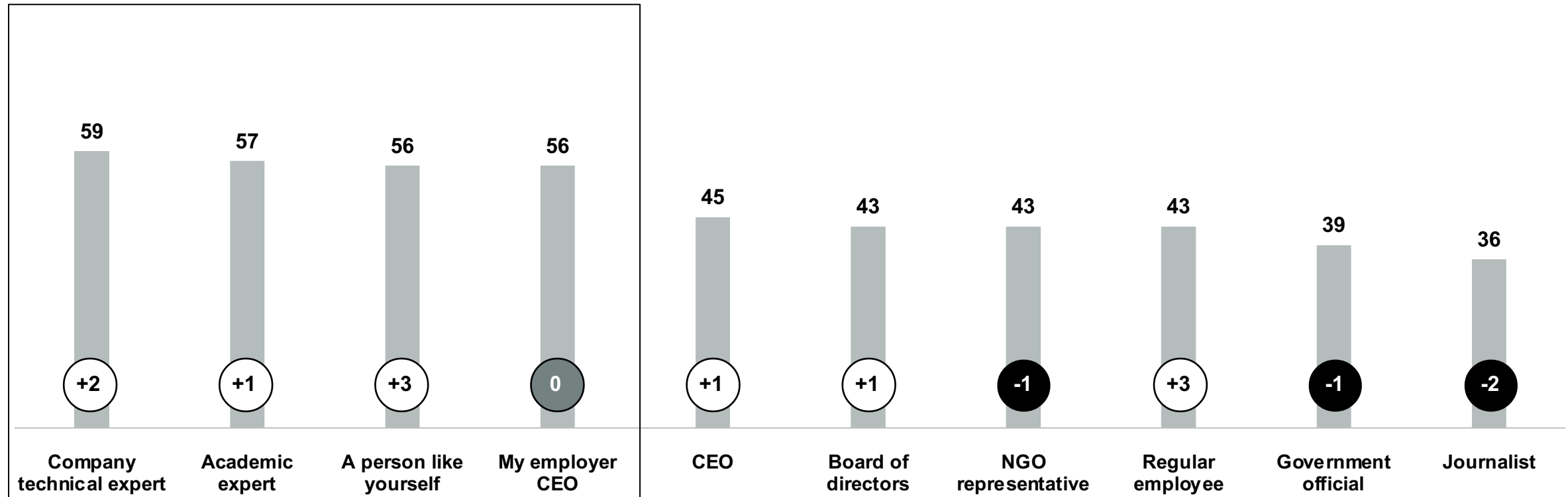


2021 Edelman Trust Barometer Spring Update: A World in Trauma. CLEANUP. Which of the following media sources do you believe is doing a good job when it comes to cutting down on the amount of misleading and false information that people who get their news and information from them might be exposed to? Pick all that apply. Question asked of half of the sample. General population, 14-mkt avg.

EXPERTS, PEERS, EMPLOYER CEOS MOST CREDIBLE SPOKESPEOPLE

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

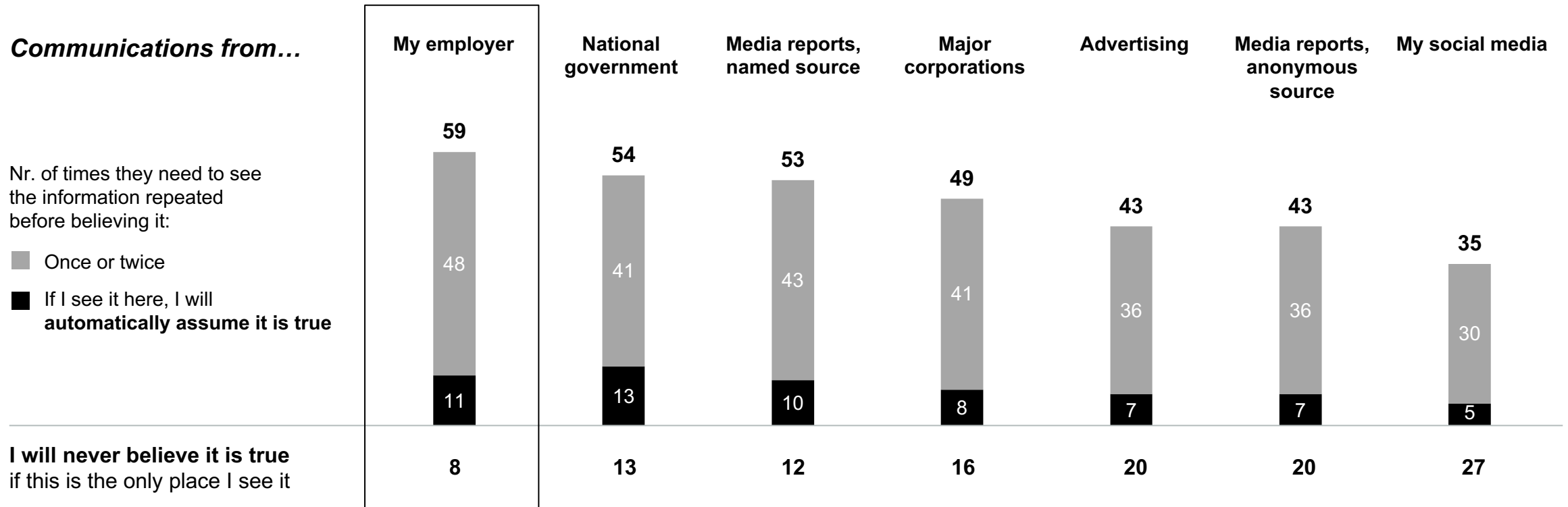
Change, Jan 2021 to May 2021



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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. General population, 14-mkt avg. “My employer CEO” only asked of those who are an employee (Q43/1).

EMPLOYER MEDIA MOST BELIEVABLE

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



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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, 14-mkt avg. "Employer communications" only asked of those who are an employee (Q43/1).

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GOVERNMENT UNDERPERFORMS

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BUSINESS OUTPERFORMS GOVERNMENT ACROSS KEY SOCIETAL CHALLENGES

Percent who say institutions are doing well on each

	Business	Government	<i>Performance gap, business vs. government</i>
Driving economic growth and job creation	42	35	7
Responding to the health and public safety aspects of the COVID-19 pandemic	43	40	3
Guarding information quality	37	34	3
Addressing systemic inequalities	33	30	3
Improving our healthcare system	37	37	0
Ensuring our education system is preparing people for jobs of the future	33	34	-1
Addressing climate change	31	32	-1

Business seen as performing as well or better, even in roles traditionally performed by government

2021 Edelman Trust Barometer Spring Update: A World in Trauma. PER_BUS. How well do you feel business is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; top 2 box, doing well. Question asked of half the sample. PER_GOV. How well do you feel the government is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; top 2 box, doing well. Question asked of half the sample. General population, 13-mkt avg. Data not collected in China.

ONLY GOVERNMENT LEADERS SEEN AS LESS HONEST AND CREDIBLE THAN A YEAR AGO

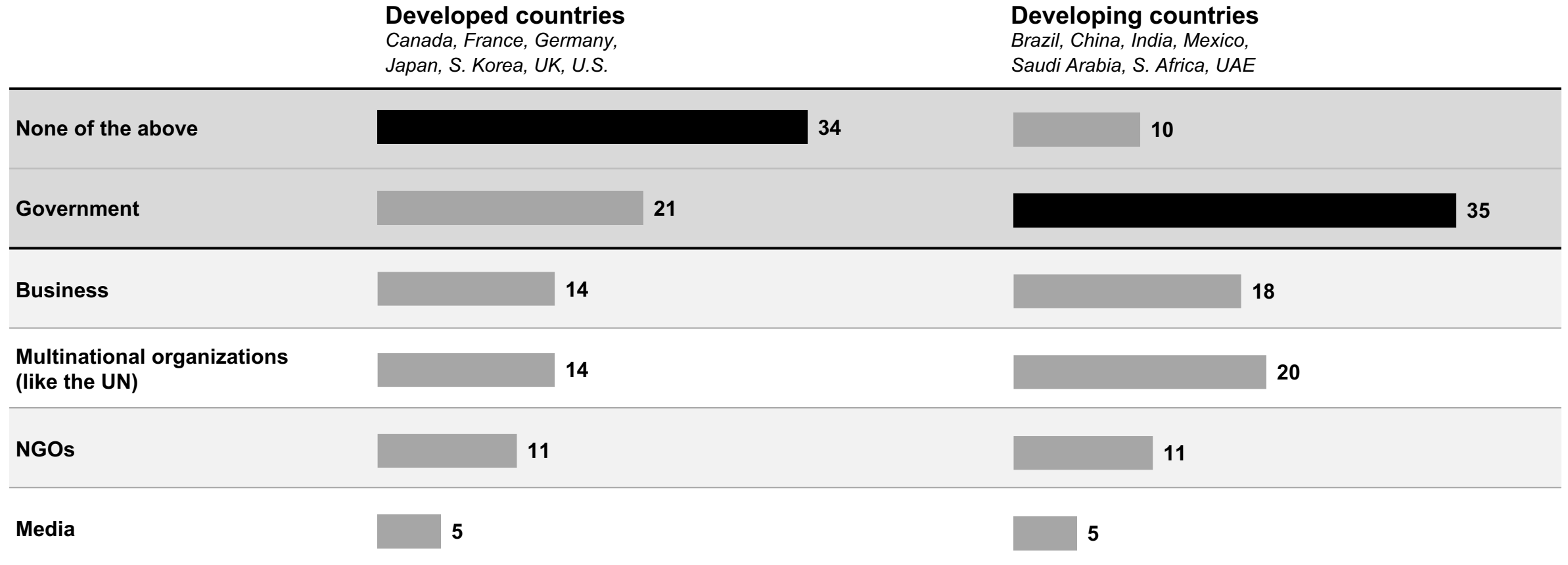
Percent who say their perception of the honesty and credibility of each has stayed high, increased or decreased in the last year

2021 Edelman Trust Barometer Spring Update: A World in Trauma. CRISIS_CRED. Comparing your feelings now to what they were a year ago, how has your perceptions of the honesty and credibility of these leaders changed or not based on what they have said and how they have acted since the start of the pandemic. Please indicate your answer using the 4-point scale below. 4-point scale; code 1, remained high over the past year; code 3, significantly increased over the past year; code 4, significantly decreased over the past year. Question asked of half of the sample; "My employer CEO" only asked of those who are an employee (Q43/1). General population, 14-mkt avg.

	Was high and <i>stayed high</i>	Was low, but significantly <i>increased</i>	Was high, but significantly <i>decreased</i>
Doctors and healthcare providers	38	29	8
Academics and scientists	32	27	10
My employer CEO	27	24	12
Global health authorities (WHO, CDC)	24	23	19
National government leaders	20	19	23
State or local government leaders	19	21	23
CEOs and business leaders	17	22	14

GLOBAL DIVERGENCE ON WHETHER GOVERNMENT CAN BE TRUSTED TO LEAD

Percent who trust each institution to lead the world into a better future



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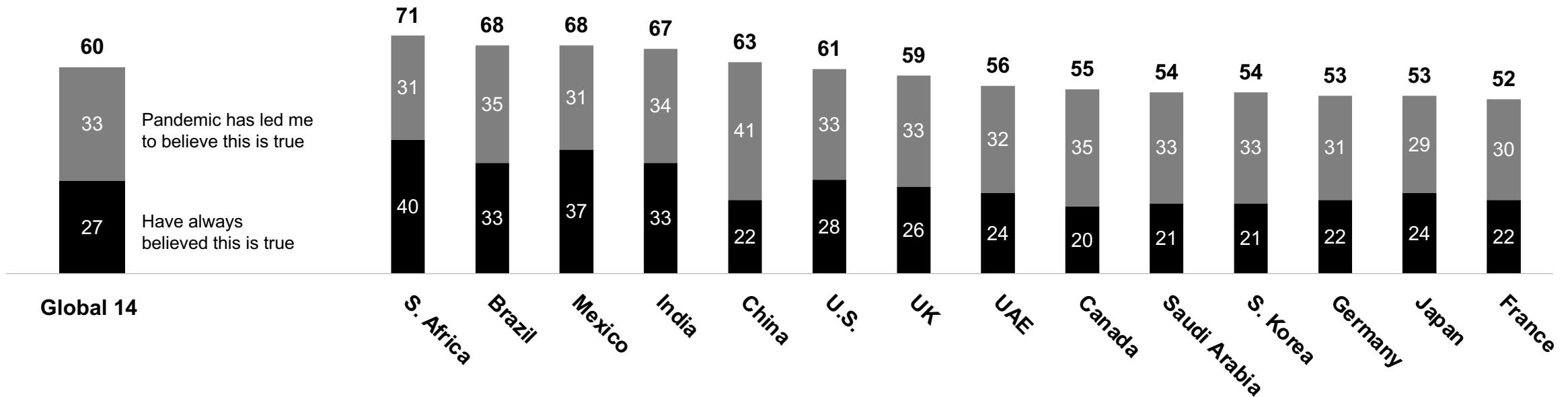
**BUSINESS:
BURDENED BY
GREAT EXPECTATIONS**

⊥

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

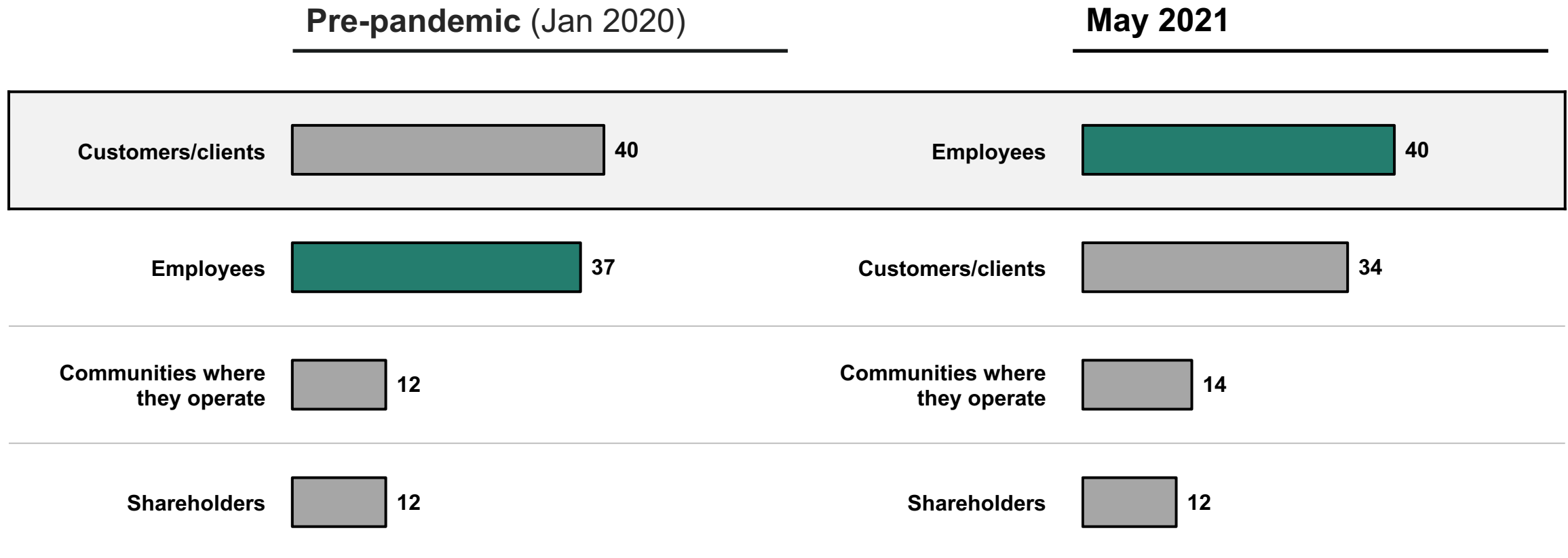
Our country will not be able to overcome our challenges **without business' involvement**



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.

EMPLOYEES NOW MOST IMPORTANT STAKEHOLDER

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



NEARLY 8 IN 10 EMPLOYEES EXPECT THEIR COMPANY TO ACT ON SOCIETAL ISSUES

Percent of employees who expect their employer to take one or more actions on each issue:

Vaccine hesitancy	84
Climate change	81
Automation	79
Infodemic	79
Racism	79
Immigration and border security	70

on average,

+ **79%**

of employees expect their employer to take action

PUBLIC EXPECTS CEOS TO PRIORITIZE SOCIETAL ISSUES EVEN MORE

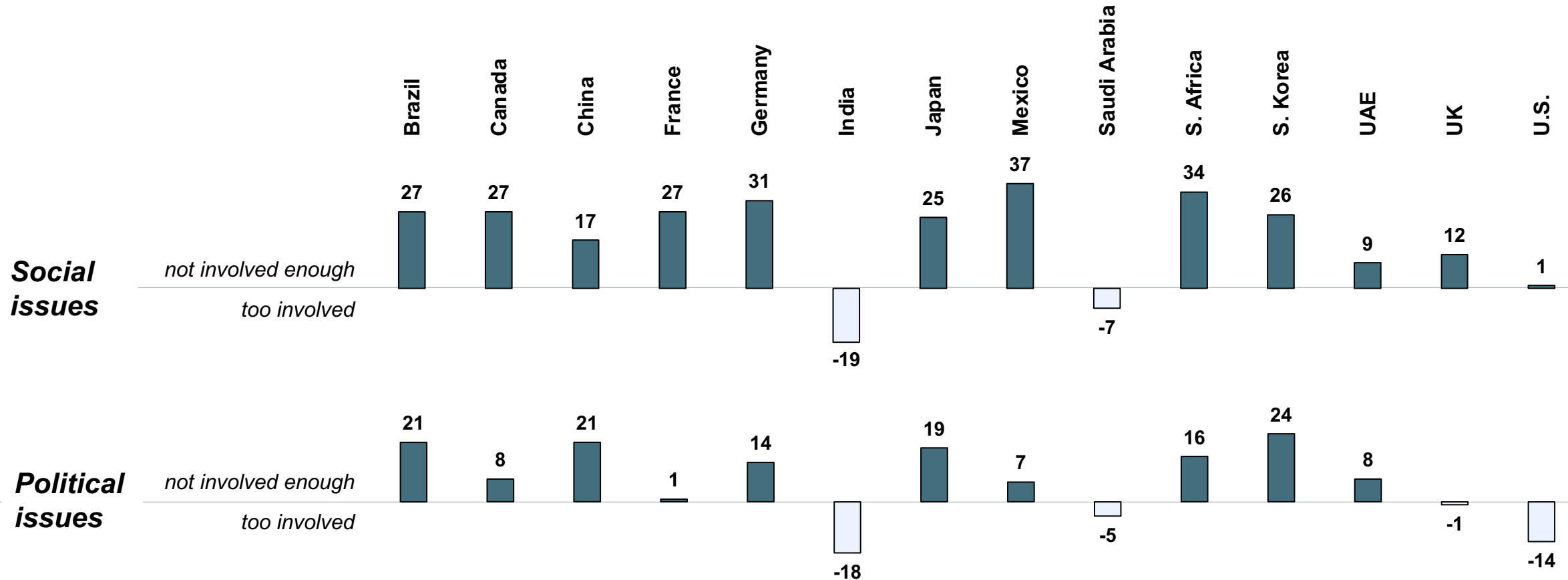
Percent who feel that CEOs need to be making a higher priority than they currently are

	Global 14	Brazil	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	UK	U.S.
Majority feel this way															
Over a third feels this way															
Gender and ethnic pay equality	51	58	57	42	55	51	48	40	56	45	65	39	50	50	52
Ensure their company is trusted	42	59	47	30	33	44	36	21	48	37	58	44	42	48	42
Ensure their company is paying its fair share of taxes	40	42	51	27	49	43	33	29	40	27	50	36	30	52	47
Reduce their carbon footprint	40	47	48	30	50	46	30	33	50	28	49	39	36	43	37
Ensure their company's workforce is inclusive and diverse	30	35	35	31	25	21	28	20	28	26	43	30	30	37	34
Increase their company's profits and stock price	21	18	19	23	12	11	24	19	17	27	25	30	27	19	25

2021 Edelman Trust Barometer Spring Update: A World in Trauma. CEO_BETTER. Below is a list of potential expectations that you might have for a company CEO. Which ones do you feel that CEOs in general need to be making a higher priority than they currently are? Pick all that apply. Question asked of half of the sample. General population, 14-mkt ag. "Gender and ethnic pay equality" is a net of attributes 10 and 11.

MORE SUPPORT FOR CEOs TO PRIORITIZE 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 with more?

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%

OR

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

Improvements to our healthcare system	57
Greater preparedness for future pandemics	55
Innovations around how we work	47
Accelerated development of technologies	39
More attention on climate change	37

2021 Edelman Trust Barometer Spring Update: A World in Trauma. PER_CHOICE. You are about to see a series of two choices. For each pair, we want you to choose the one that you agree with more. BETTER. You just indicated that you believe that the pandemic will lead to some changes for the better. Which of the following do you believe will be included in those positive changes? Pick all that apply. Question asked of those who said, "living through the pandemic will lead to changes for the better" (PER_CHOICE/2). General population, 14-mkt avg.

TOWARD A POST-PANDEMIC WORLD

1

Beware the pedestal

Business has proven itself invaluable in the pandemic but can't solve all societal problems on its own.

2

Lean into comparative advantage

Business must make choices and lead where they have expertise—jobs, training, fair wages and innovation—and continue to take action on inclusion and sustainability.

3

Employees are now job one

Business must prioritize employees, now their most important stakeholder.

4

Government must lead on foundational challenges

Government involvement is essential on broad societal issues such as vaccination, return to workplace, privacy, income inequality and climate change.

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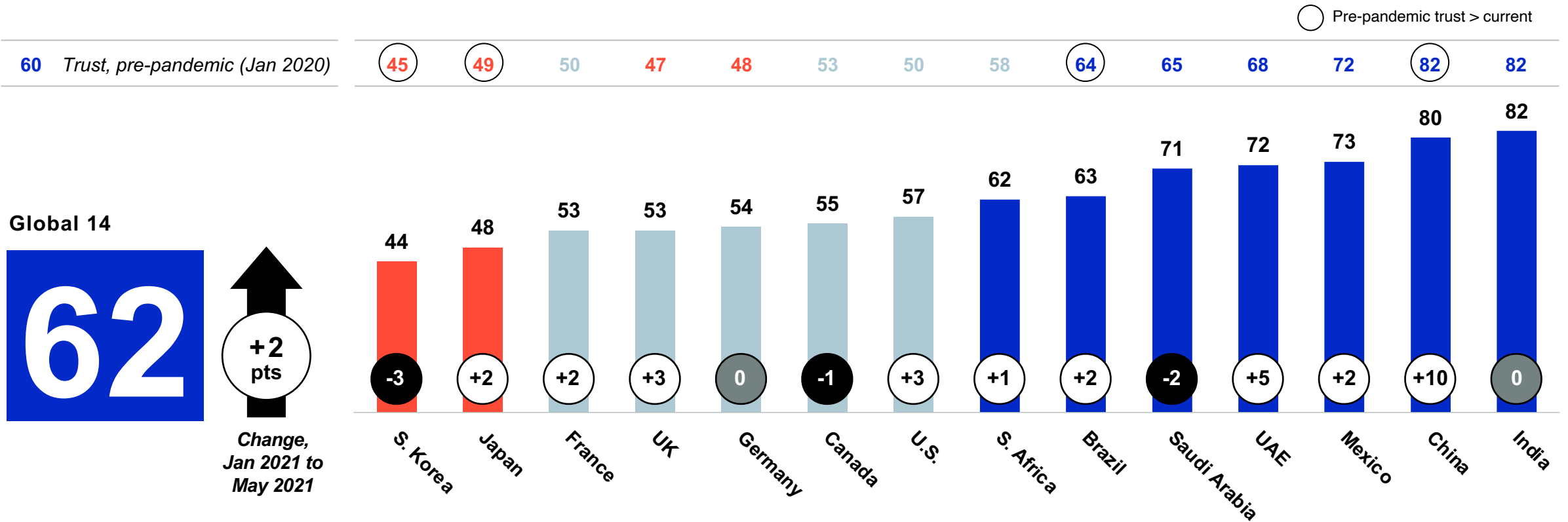
SUPPLEMENTAL DATA

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Since January 2021...

TRUST IN BUSINESS INCREASES IN 9 OF 14 COUNTRIES

Percent trust



Since January 2021...

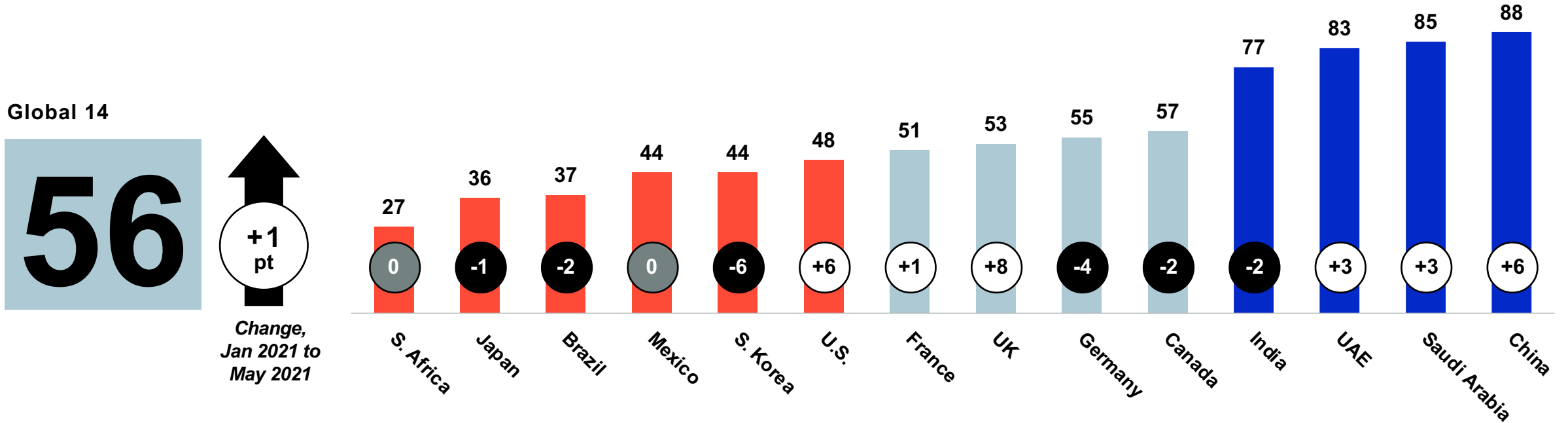
GOVERNMENT NOT TRUSTED IN 10 OF 14 COUNTRIES

Percent trust



52 Trust, pre-pandemic (Jan 2020)

○ Pre-pandemic trust > current



Since January 2021...

TRUST IN MY EMPLOYER INCREASES IN 8 OF 14 COUNTRIES

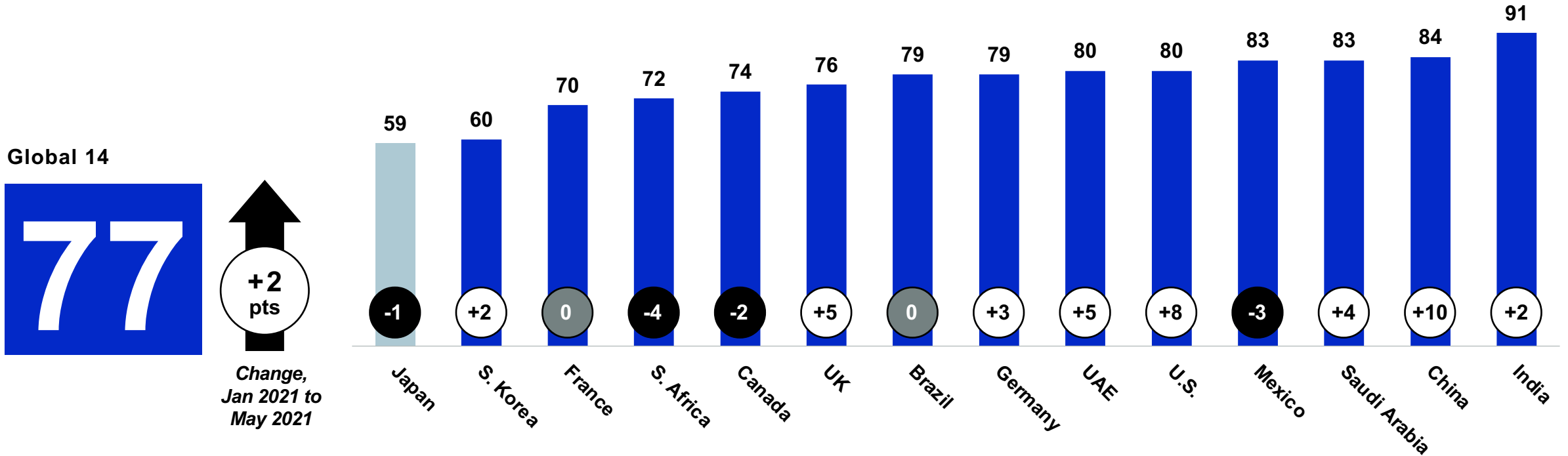
Percent trust



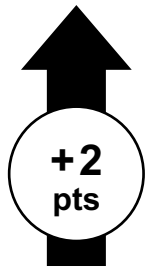
Global 14

77 Pre-pandemic (Jan 2020)

○ Pre-pandemic trust > current



Global 14

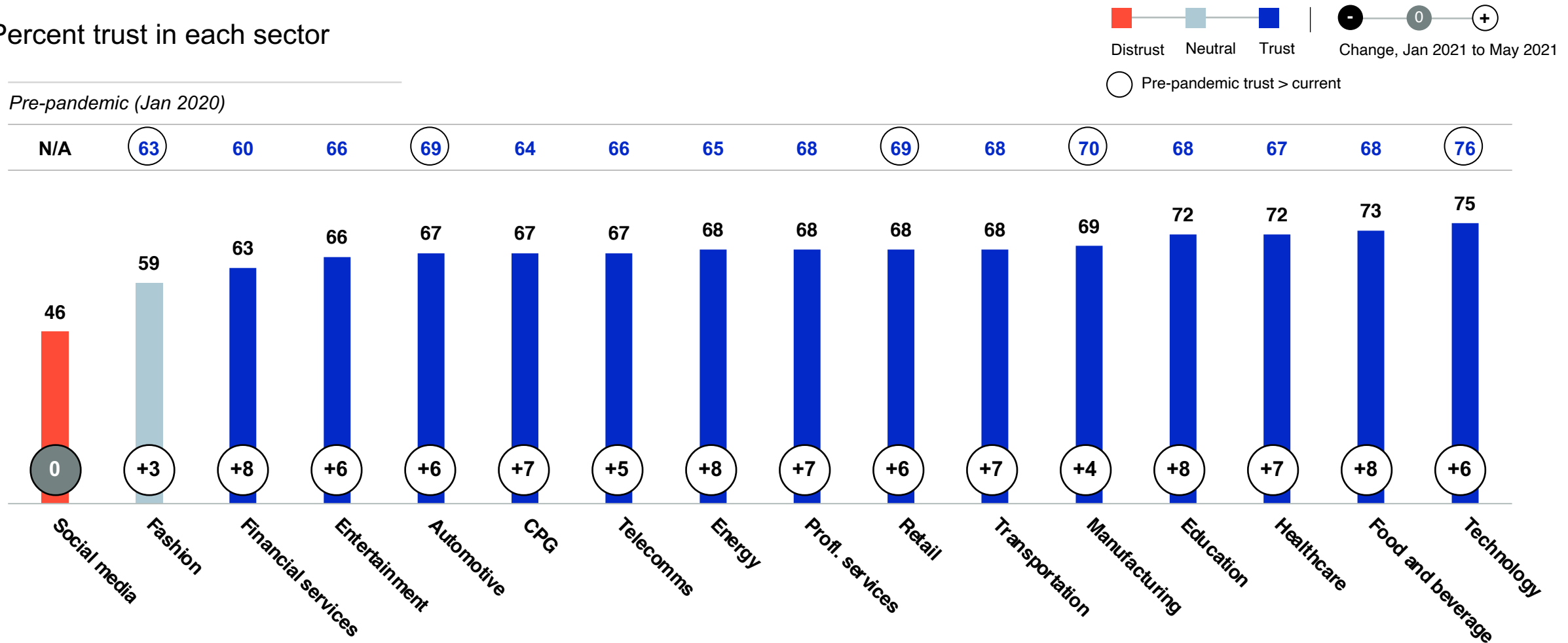


Change, Jan 2021 to May 2021

Since January 2021...

MOST INDUSTRY SECTORS AT OR ABOVE PRE-PANDEMIC TRUST LEVELS

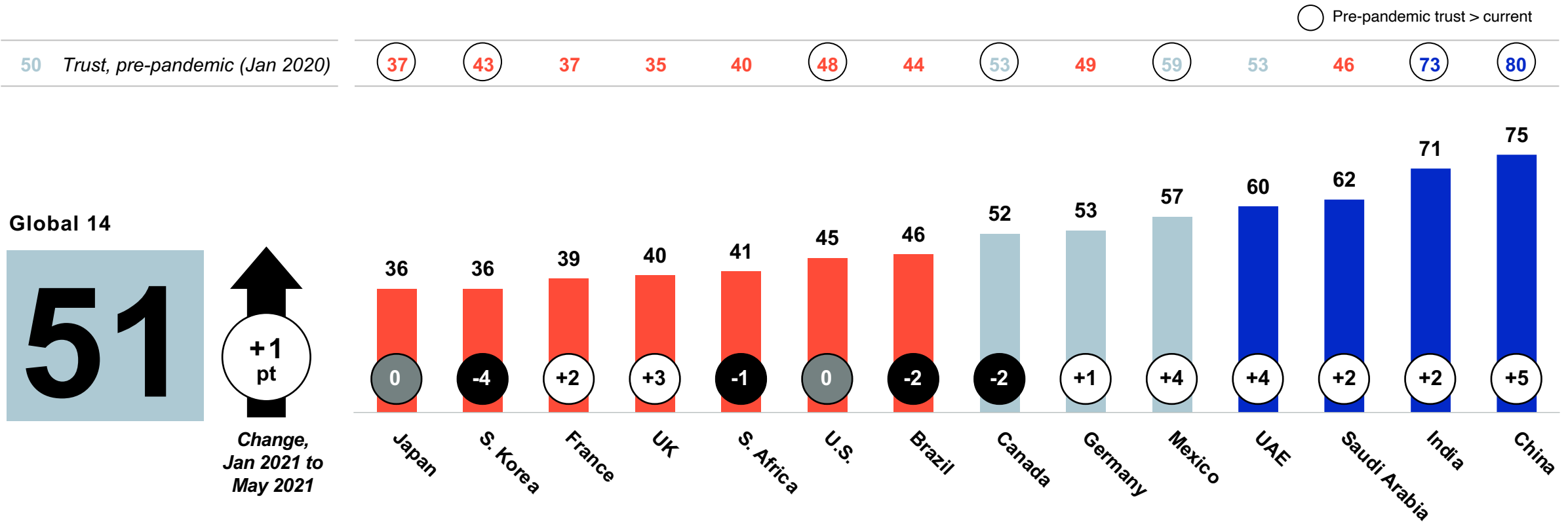
Percent trust in each sector



Since January 2021...

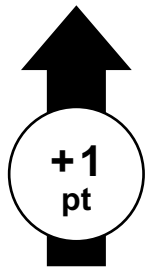
TRUST IN MEDIA INCREASES IN 8 OF 14 COUNTRIES

Percent trust



Global 14

51

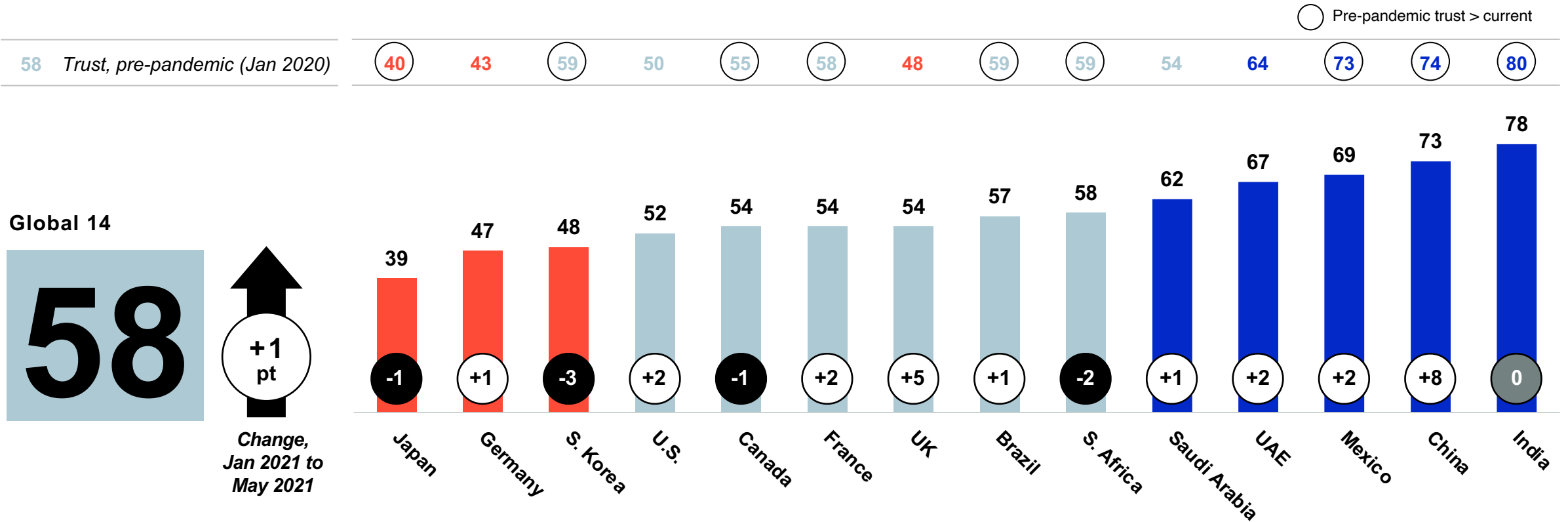


Change, Jan 2021 to May 2021

Since January 2021...

TRUST IN NGOS INCREASES IN 9 OF 14 COUNTRIES

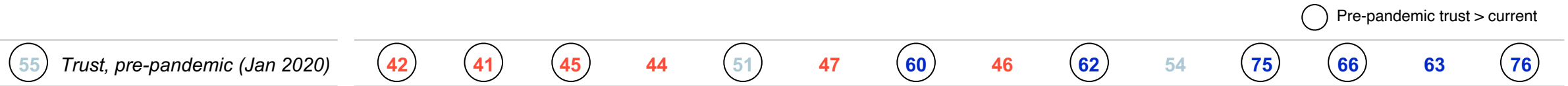
Percent trust



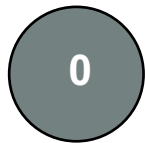
Since January 2021...

TRUST IN THE EU INCREASES IN 8 OF 14 COUNTRIES

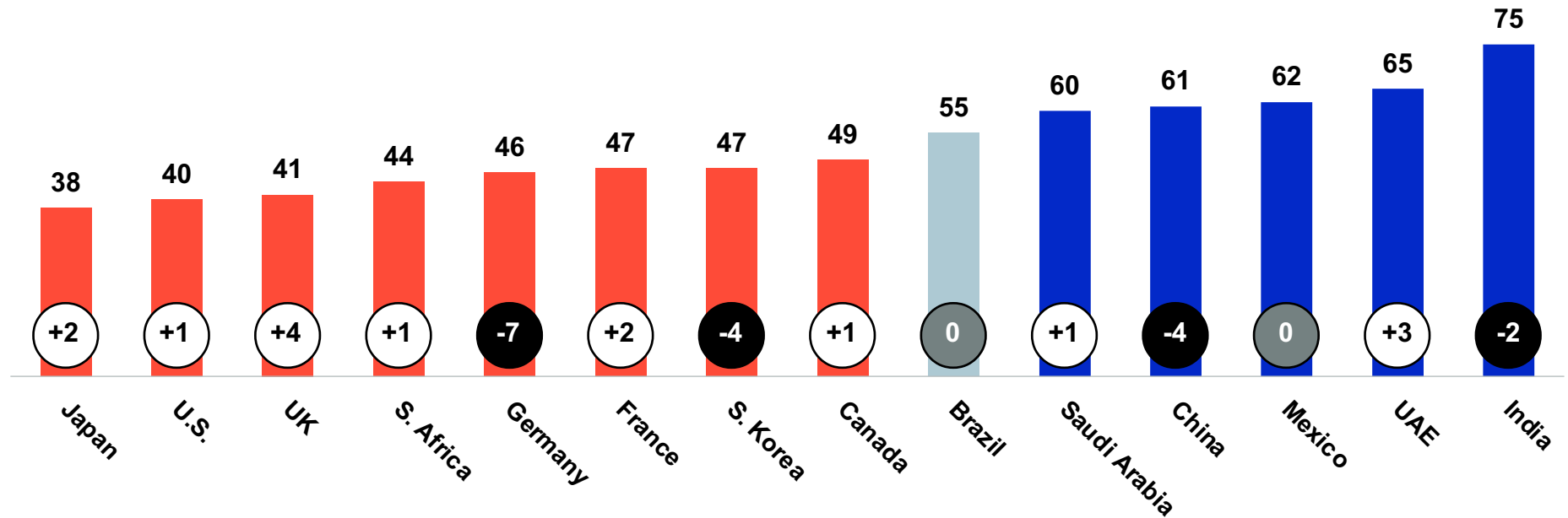
Percent trust



Global 14



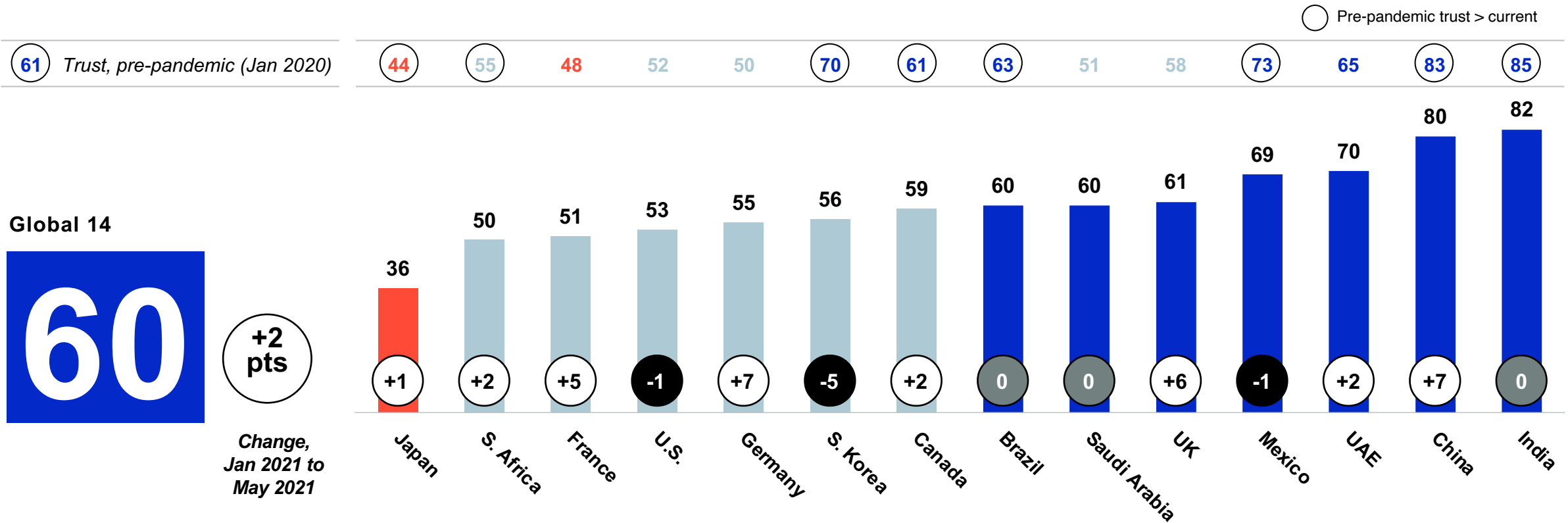
Change,
Jan 2021 to
May 2021



Since January 2021...

TRUST IN THE UN INCREASES IN 8 OF 14 COUNTRIES

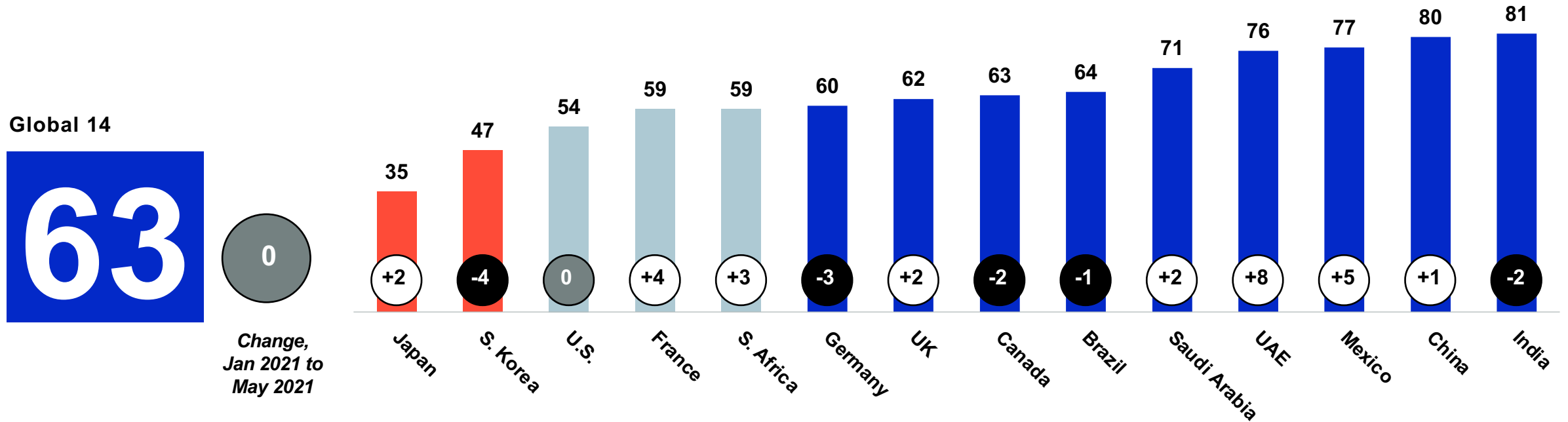
Percent trust



Since January 2021...

TRUST IN THE WORLD HEALTH ORGANIZATION INCREASES IN 8 OF 14 COUNTRIES

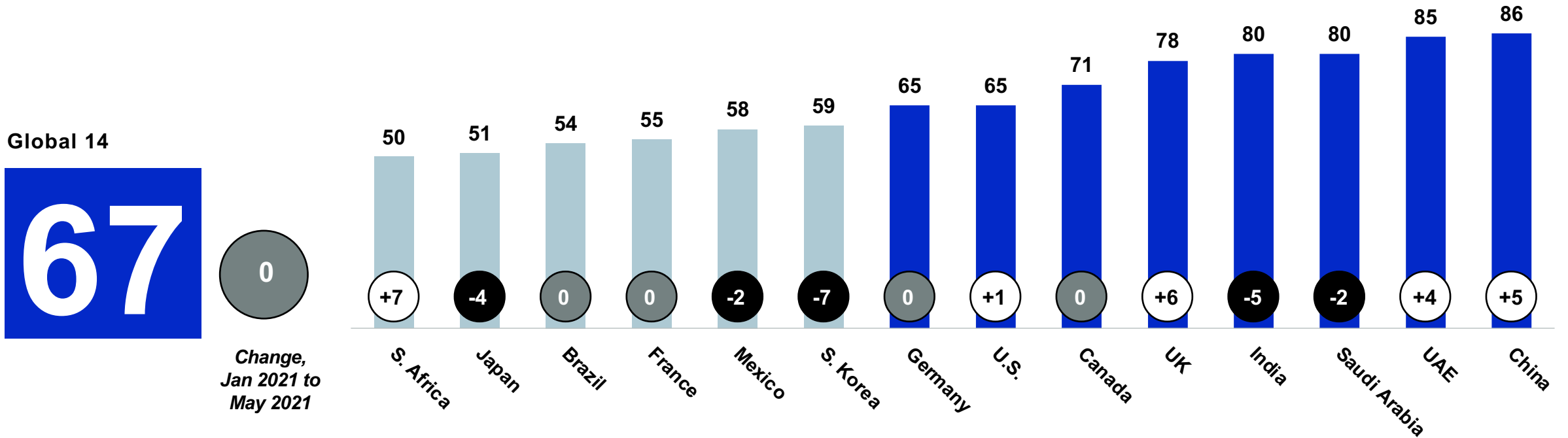
Percent trust

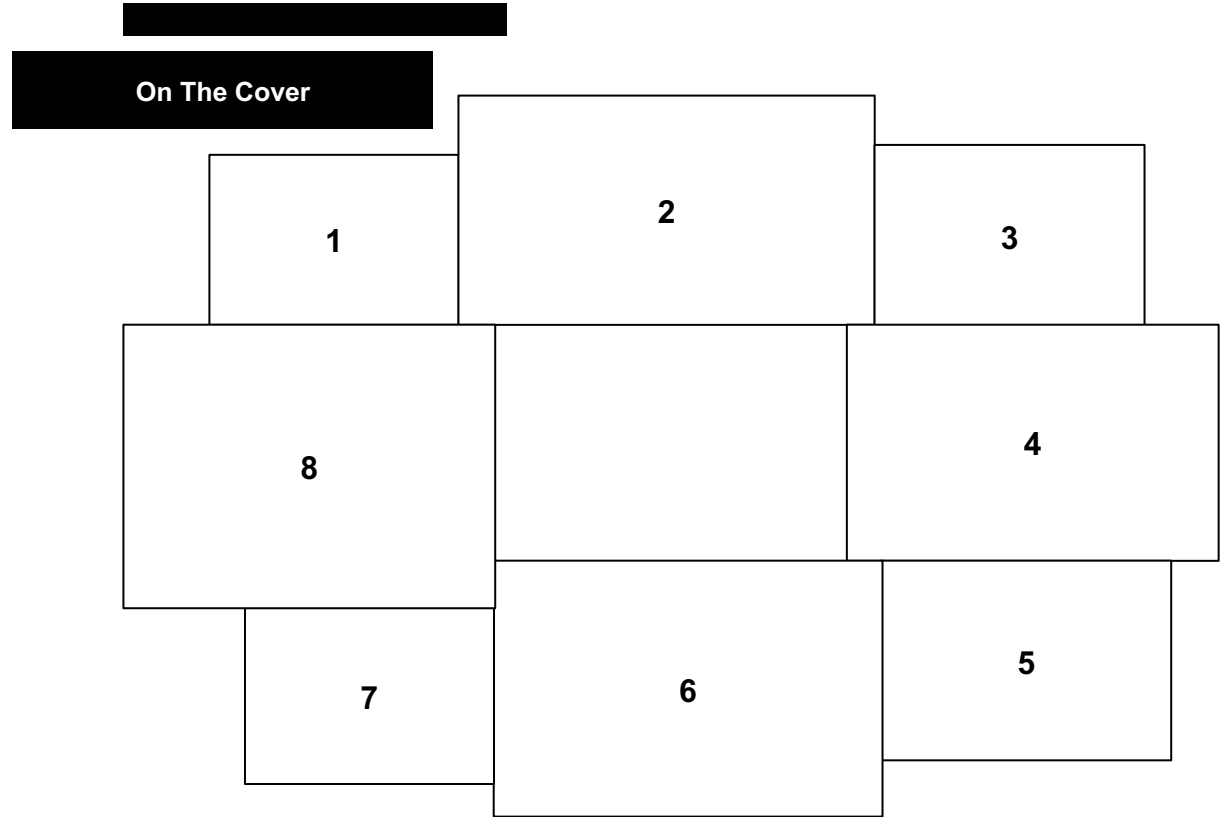


Since January 2021...

TRUST IN NATIONAL HEALTH AUTHORITIES INCREASES IN 8 OF 14 COUNTRIES

Percent trust





1 Boris Johnson Holds Press Conference On Government's COVID-19 Response: *Alberto Pezzali - WPA Pool/Getty Images* **2** A family member of Covid-19 infected patient carries an empty oxygen tank to refill: *Naveen Sharma/SOPA Images/LightRocket via Getty Images* **3** YOOX Net-A-Porter Offices, London, United Kingdom. Architect: Grimshaw, 2017: *Anthony Weller/View Pictures/Universal Images Group via Getty Images* **4** Protesters hold a demonstration against lockdowns: *Jonas Gratzner/LightRocket via Getty Images* **5** Brazil Fears New Surge Of COVID-19: *Mario Tama/Getty Images* **6** Windmills: *Jerry Zhang/Unsplash* **7** MEXICO-HEALTH-VIRUS-VACCINES: *PEDRO PARDO/AFP via Getty Images* **8** Olympics: *Chip Somodevilla/Getty Images*