

Trust in
Australia



Edelman Trust Barometer 2020



20th ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 markets

34,000+ respondents total

All fieldwork was conducted between
October 19 and November 18, 2019

2020 Edelman Australia Trust Supplementary
Study. Fieldwork was conducted in February 2020

28-market global data margin of error: General population +/- 0.6% (N=32,200), informed public +/- 1.2% (N=6,200), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8% (N=16,100).

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).

Gen Z MOE: 28-market = +/- 1.5% (N=4,310)

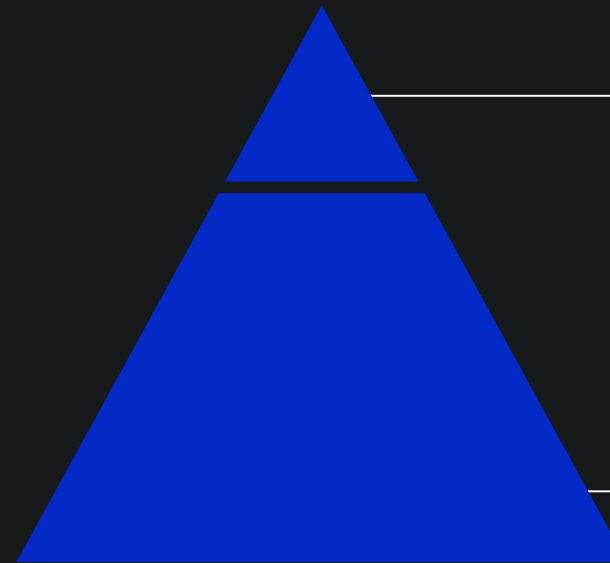
Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

General Online Population

1,150
respondents
per market

Ages
18+

All slides show general
online population data
unless otherwise noted



2020 Gen Z oversample

250 respondents age 18-24 per market



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

TRUST INEQUALITY SETS NEW RECORDS

Trust Index

Mass population 14 points less trusting

23 markets with double-digit trust gaps

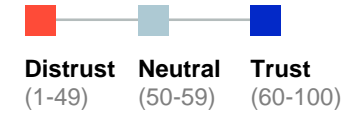
2020 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, 28-mkt avg.

2020 Informed public

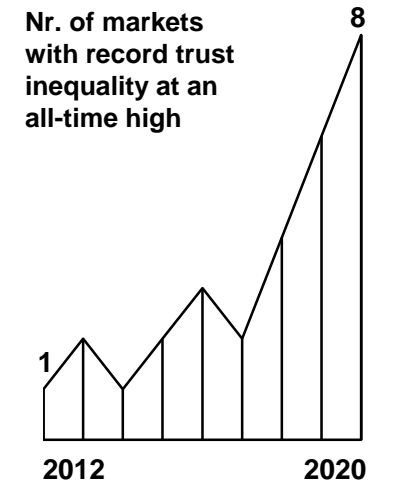
65	Global 28
90	China
87	India
82	Indonesia
80	Saudi Arabia
78	Thailand
75	UAE
71	Mexico
71	Singapore
68	Australia
68	Malaysia
67	Canada
67	The Netherlands
64	Germany
64	Italy
63	France
62	Colombia
60	Argentina
60	Brazil
60	Ireland
59	Spain
58	Kenya
57	U.K.
54	Hong Kong
53	Japan
53	U.S.
50	S. Korea
49	S. Africa
41	Russia

2020 Mass population | Trust gap

51	Global 28	14
77	China	13
74	India	13
70	Indonesia	12
64	UAE	11
62	Thailand	16
60	Singapore	11
59	Saudi Arabia	21
58	Malaysia	10
58	Mexico	13
57	The Netherlands	10
56	Kenya	2
52	Colombia	10
51	Canada	16
49	Brazil	11
49	Hong Kong	5
49	S. Korea	1
48	Argentina	12
48	Italy	16
45	Australia	23
45	U.S.	8
44	Germany	20
44	S. Africa	5
43	Ireland	17
42	France	21
42	Japan	11
42	Spain	17
39	U.K.	18
27	Russia	14

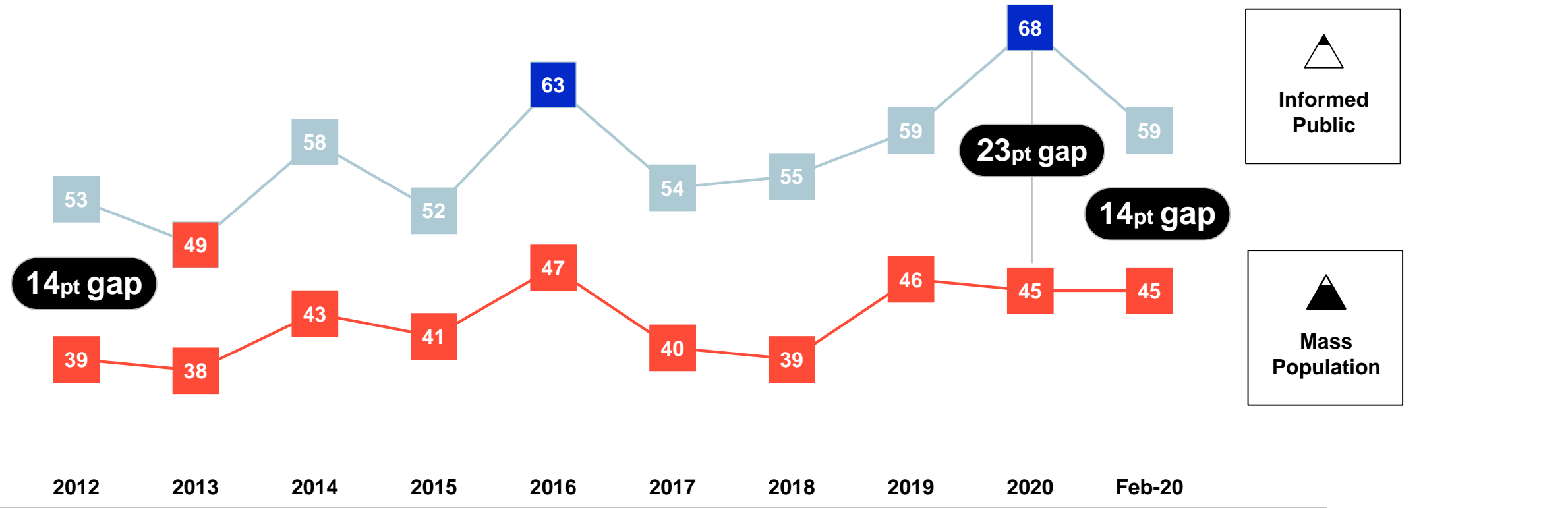


Record trust inequality



TRUST INEQUALITY INCREASES THEN FALLS IN THREE MONTHS

Trust Index



2020 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, Australia.

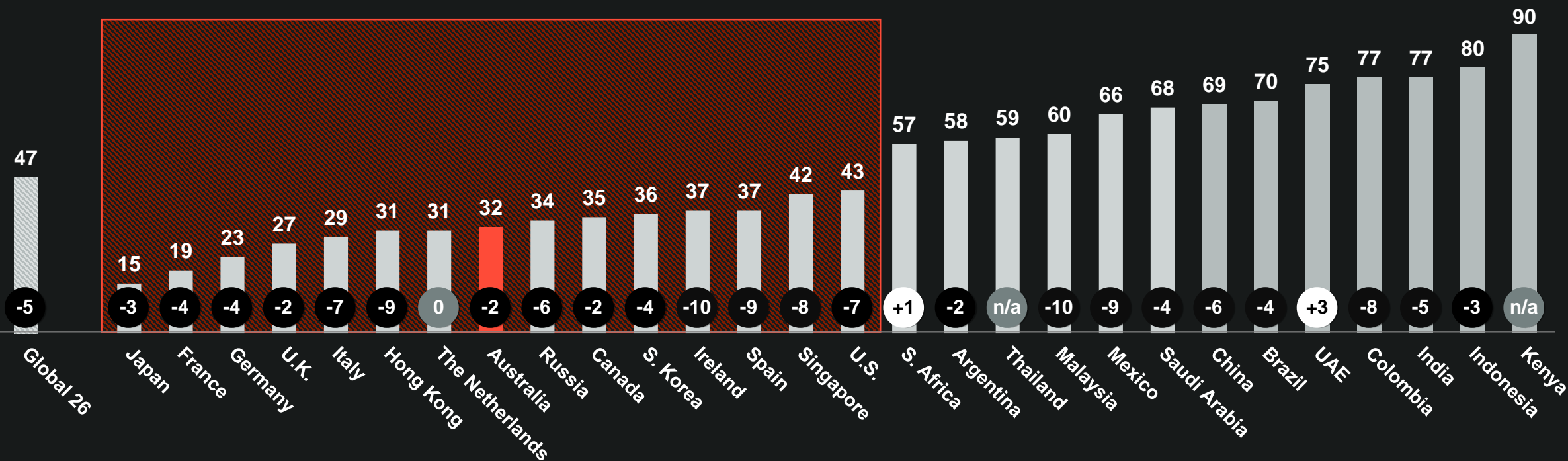
2020 Edelman Australia Trust Supplementary Study. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, Australia.

PESSIMISTIC ABOUT ECONOMIC PROSPECTS

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

Change, 2019 to 2020

Majority pessimistic in 15 of 28 markets



2020 Edelman Trust Barometer. CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. General population, 26-mkt avg.

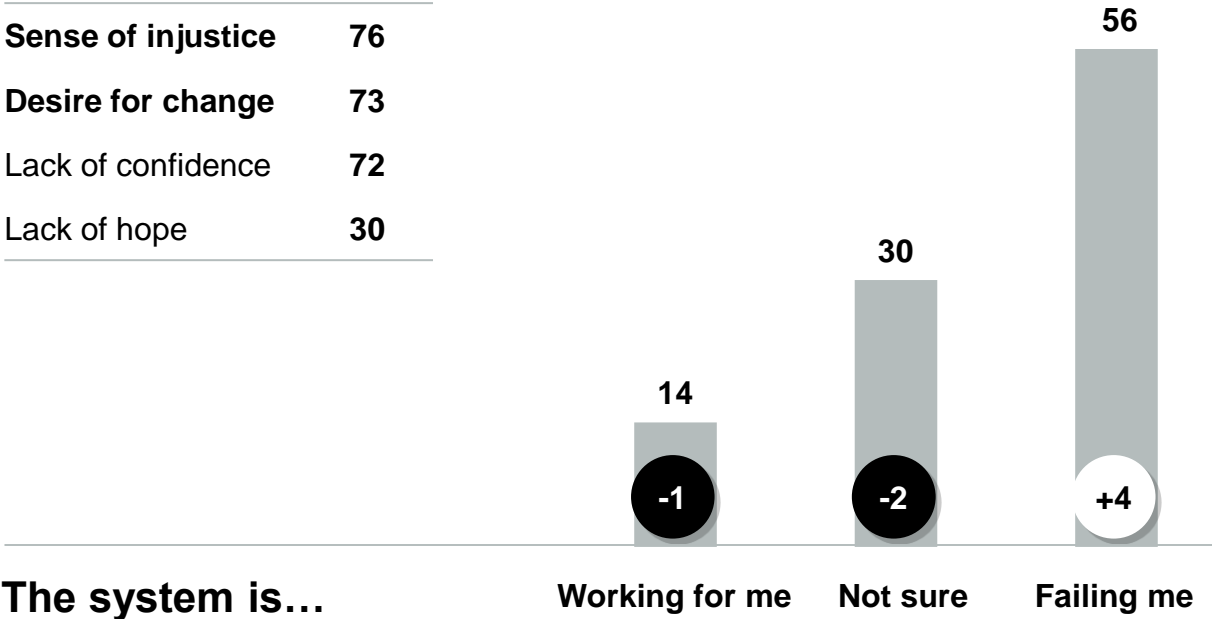
A FAILING SYSTEM

Percent in Australia who agree



How true is this for you?

Sense of injustice	76
Desire for change	73
Lack of confidence	72
Lack of hope	30



Capitalism as it exists today
**does more harm than
good in the world**

⊥
50%

2020 Edelman Trust Barometer. “System failing” measure. For full details on how the “system failing” measure was calculated, please refer to the Technical Appendix. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is. 9-point scale; top 4 box, true. General population, Australia. Sense of injustice is an average of POP_MDC/1,2,3,8; Desire for change is POP_MDC/9; Lack of confidence is POP_MDC/10; Lack of hope is an average of POP_MDC/18,19,20 [reverse scored]. TMA_SIE_SHV. 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, Australia.

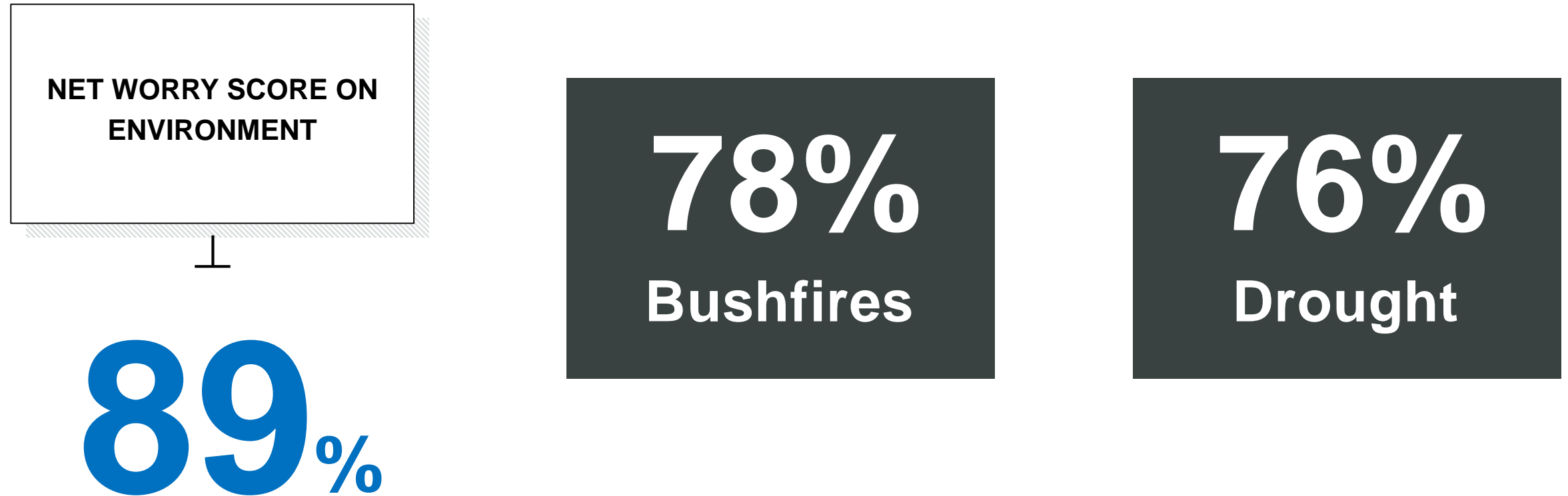
⊥

UNITED IN OUR WORRIES

⊥

WE'RE ALL WORRIED ON ENVIRONMENTAL MATTERS

Percent in Australia who worry about each concern

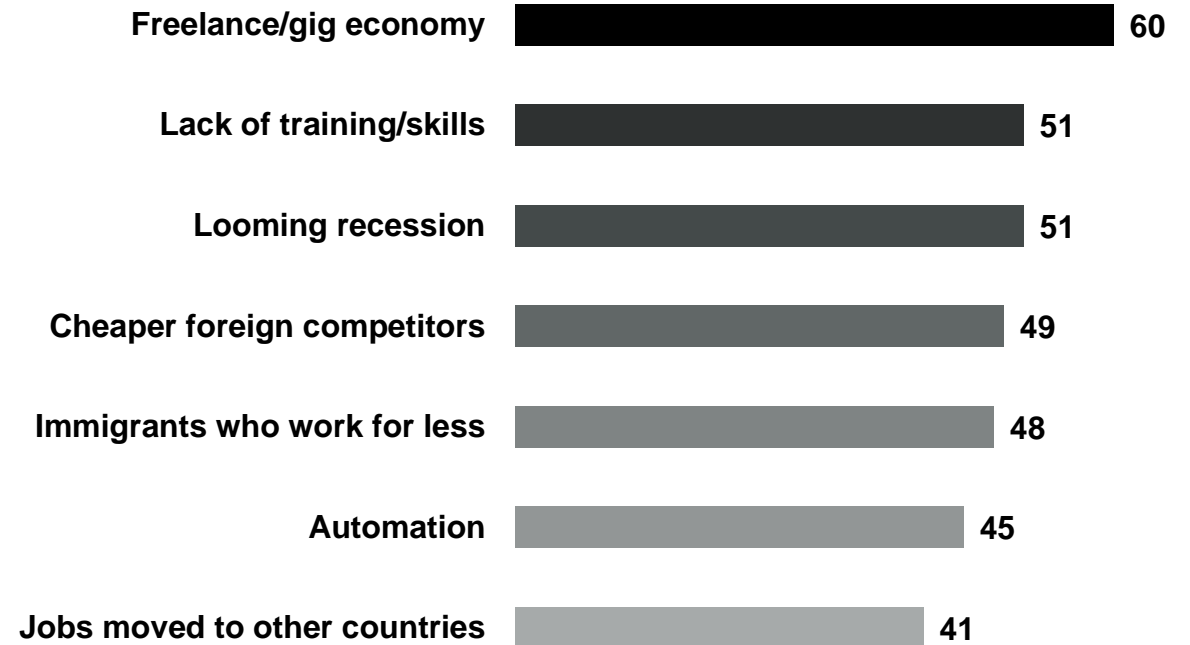


THE FUTURE OF WORK RAISES WORRIES ABOUT JOBS

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

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

⊥
80%



TECHNOLOGY IS OUT OF CONTROL

Percent in Australia who agree

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

⊥

59%

I worry technology will make it impossible to know if **what people are seeing or hearing is real**

⊥

69%

Government **does not understand emerging technologies** enough to regulate them effectively

⊥

69%

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. Australia. 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. Australia. 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). Australia. All questions asked of half of the sample among the general population.

WORRY ABOUT QUALITY INFORMATION

Percent in Australia who agree

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

⊥
55%

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

⊥
74%

+7 pts
Change,
2018 to 2020



⊥

TRUST IS BUILT ON COMPETENCE AND ETHICS

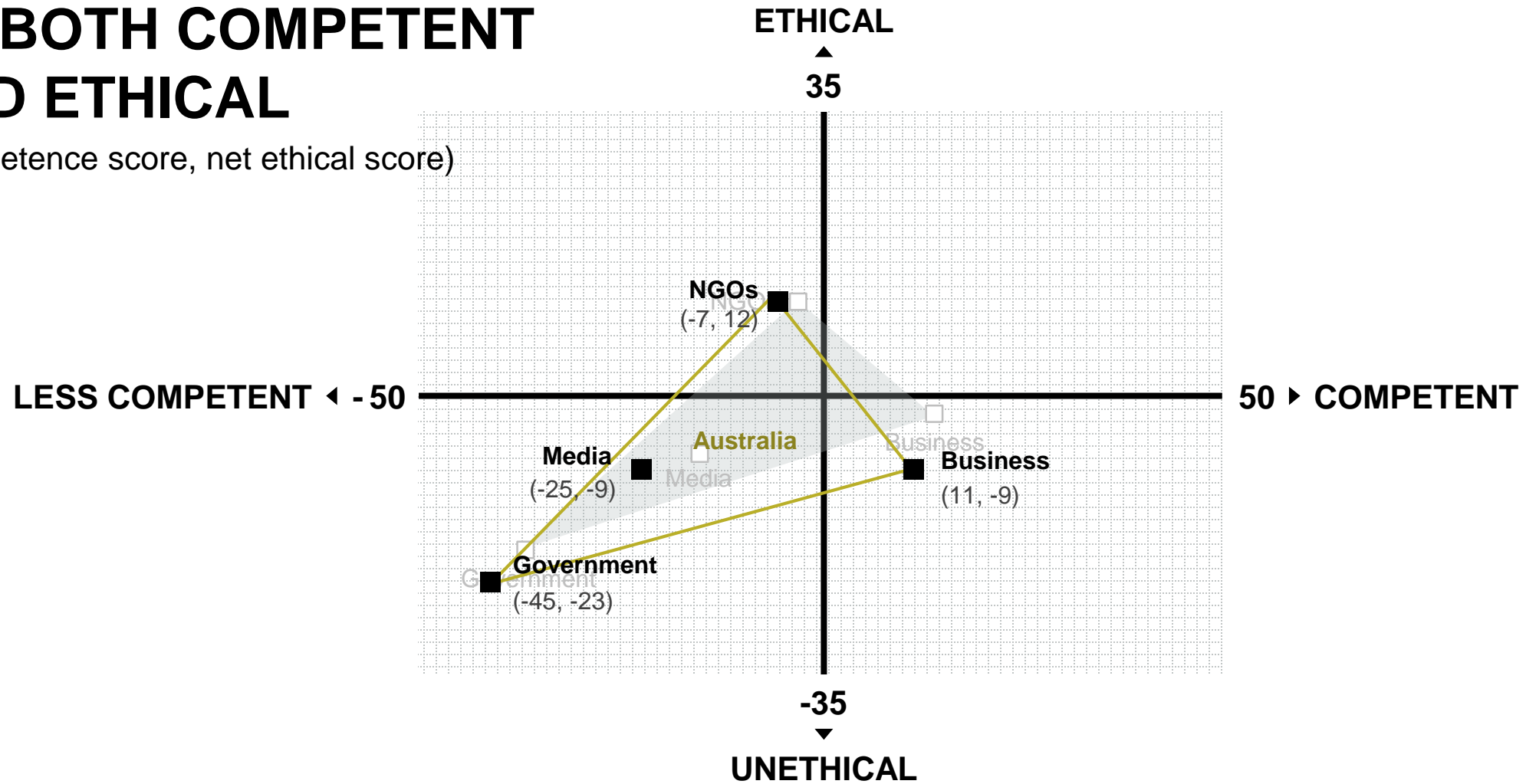
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NO INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL

(Competence score, net ethical score)

■ Australia

□ Global



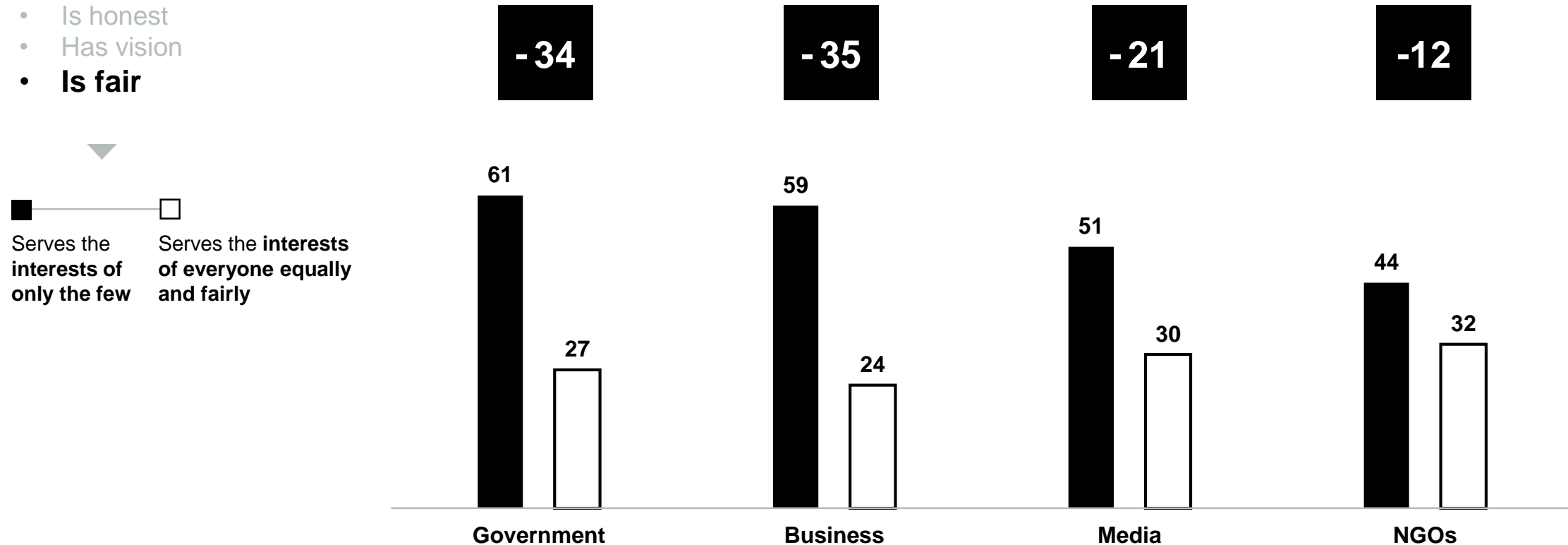
2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INSTITUTION] r1. Depending on the question it was either asked of the full or half the sample. General population, 25-mkt avg and Australia. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.


INSTITUTIONS SEEN AS UNFAIR

Percent in Australia who cite each as a reason they trust or distrust each institution

This institution...

- Is purpose-driven
- Is honest
- Has vision
- **Is fair**



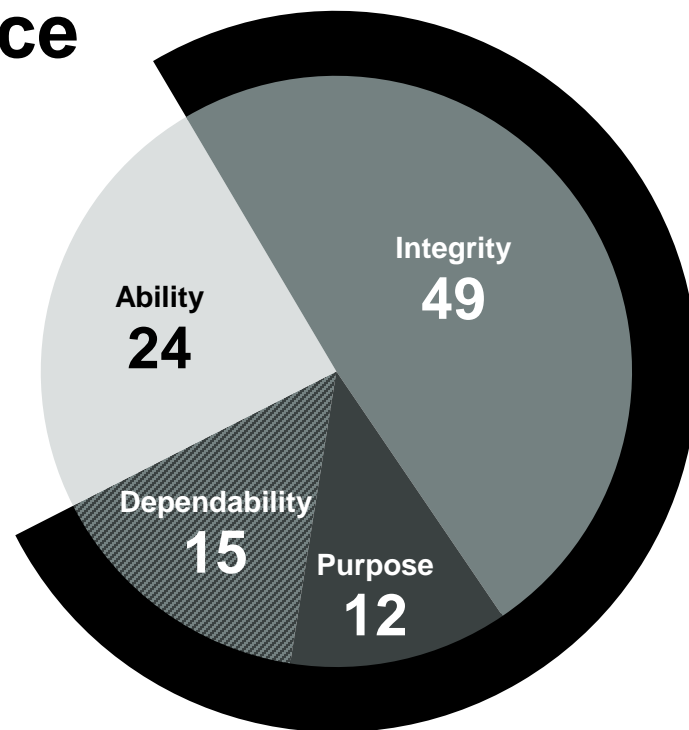
 **2020 Edelman Trust Barometer.** Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive; bottom 5 box, negative. Question asked of half of the sample. General population, Australia.

ETHICAL DRIVERS 3X MORE IMPORTANT TO COMPANY TRUST THAN COMPETENCE

Percent of predictable variance in trust explained by each dimension

Competence

24%



Ethics

76%

Washington, August 2019

The Business Roundtable redefines the purpose of a corporation



Biarritz, August 2019

Business for Inclusive Growth (B4IG) coalition forms to address inequality and diversity



New York, September 2019

Coalition of business, civil society and UN leaders pledge to set climate targets to 1.5°C



New York, January 2020

BlackRock shifts investment strategy to focus on sustainability

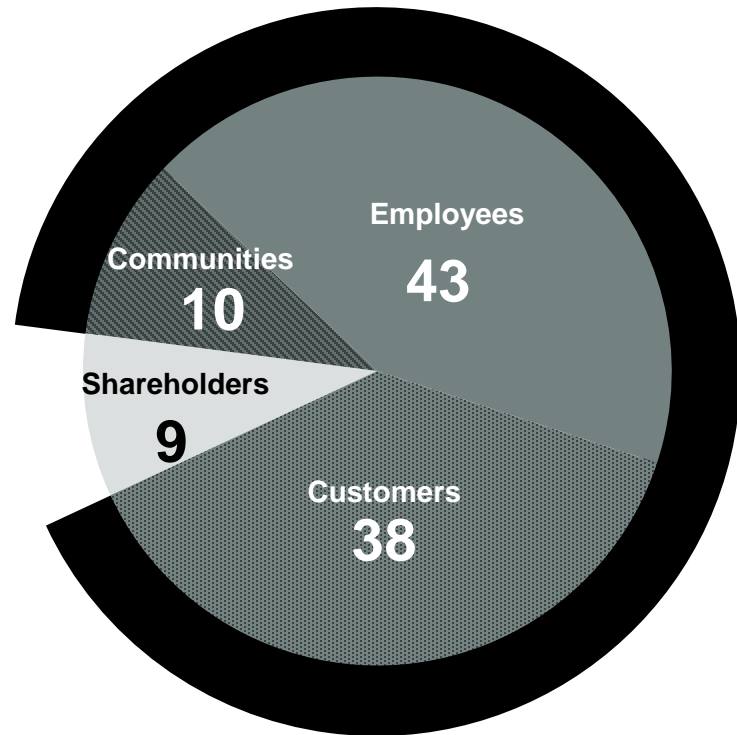


Business
Roundtable

IT'S TIME TO ACT

SERVE THE INTERESTS OF ALL STAKEHOLDERS

Percent in Australia who ranked each group as most important



+ 91%

Stakeholders, not
shareholders, are most
important to long-term
company success

Percent in Australia who agree

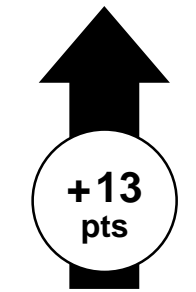
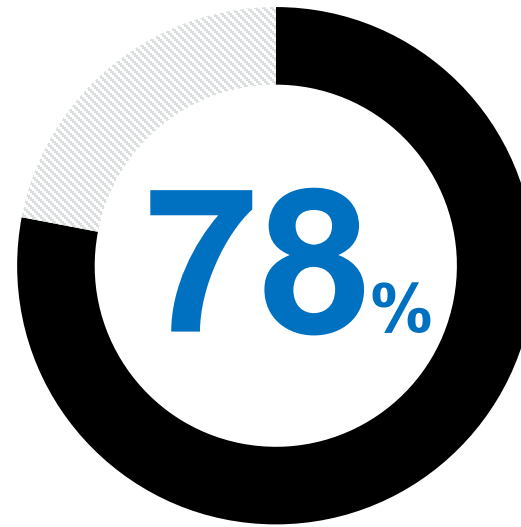
70%

a company can take actions
that both increase profits
and improve conditions in
communities where it operates

INCREASED EXPECTATION PLACED ON AUSTRALIAN BUSINESS LEADERS

Percent in Australia who agree

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



Change,
2018 to 2020

Trust in
Australia



Edelman Trust Barometer 2020

