

Edelman Trust Barometer 2021



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

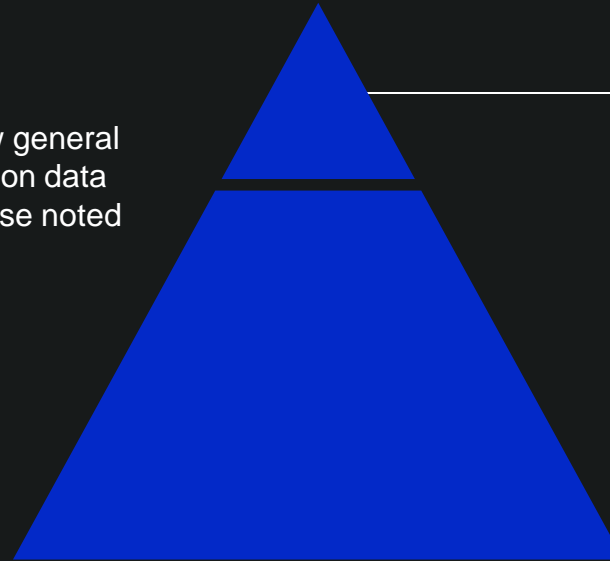
Must meet 4 criteria:

- ▶ 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



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 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	

AUSTRALIA LEADS THE GLOBE IN TRUST GAINS

Trust Index



Greatest decline in China (-10);
greatest increase in Australia (+12)

16 countries gained trust,
9 countries lost trust

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.

2020 General population

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

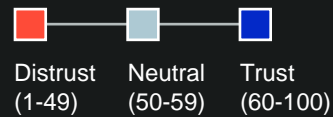
2021 General population | YoY Change

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	+3
48	S. Africa	+4
48	U.S.	+1
47	Argentina	-2
47	S. Korea	-3
45	Spain	0
45	UK	+3
40	Japan	-2
31	Russia	+1



TRUST INEQUALITY DEEPENS

Trust Index



Mass population 16 points less trusting

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2021 Informed public

2021	Global 27
68	India
86	Saudi Arabia
86	Indonesia
83	China
82	The Netherlands
79	UAE
78	Malaysia
77	Australia
76	Singapore
75	Thailand
66	Italy
66	Mexico
65	France
65	Kenya
65	S. Africa
64	Canada
63	Ireland
62	Brazil
62	Germany
62	U.S.
59	Colombia
59	S. Korea
59	UK
57	Spain
56	Argentina
52	Japan
52	Nigeria*
41	Russia

2021 Mass population | Trust gap

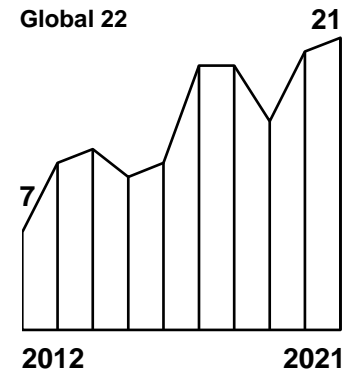
2021	Global 27	Trust gap
52	China	16
68	Indonesia	14
68	India	15
67	Saudi Arabia	19
67	Singapore	19
66	UAE	10
65	Malaysia	14
63	The Netherlands	15
62	Kenya	17
58	Mexico	7
56	Thailand	10
56	Australia	19
55	Canada	22
55	Germany	9
52	Italy	10
51	Nigeria*	15
49	Ireland	3
48	Brazil	15
47	Colombia	15
46	France	13
45	Argentina	20
44	S. Africa	12
44	Spain	21
44	U.S.	13
44	S. Korea	18
43	UK	16
43	Japan	16
39	Russia	13
28		13

Record trust inequality

DOUBLE-DIGIT TRUST INEQUALITY IN RECORD NUMBER OF COUNTRIES

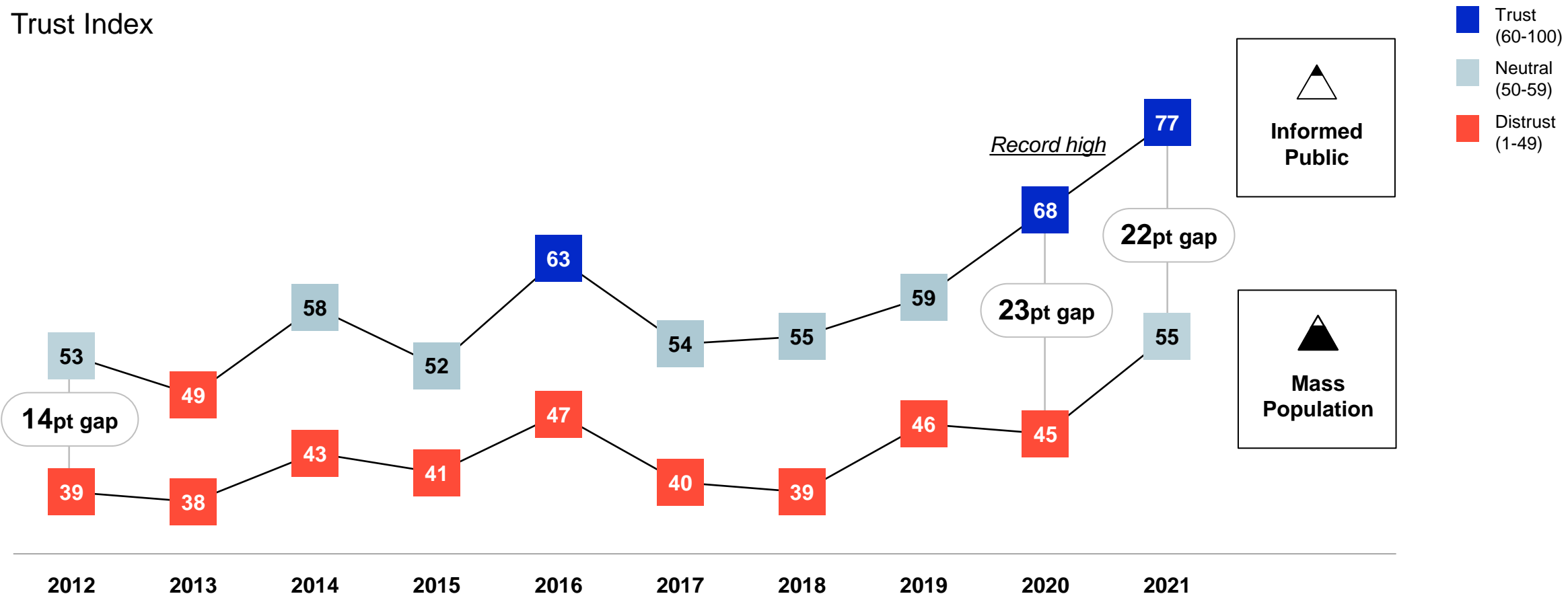


Nr. of countries with double-digit trust inequality



PERSISTENT TRUST INEQUALITY IN AUSTRALIA

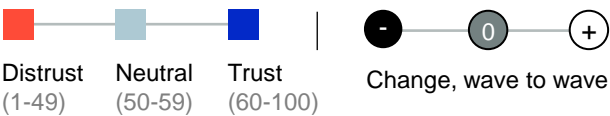
Trust Index



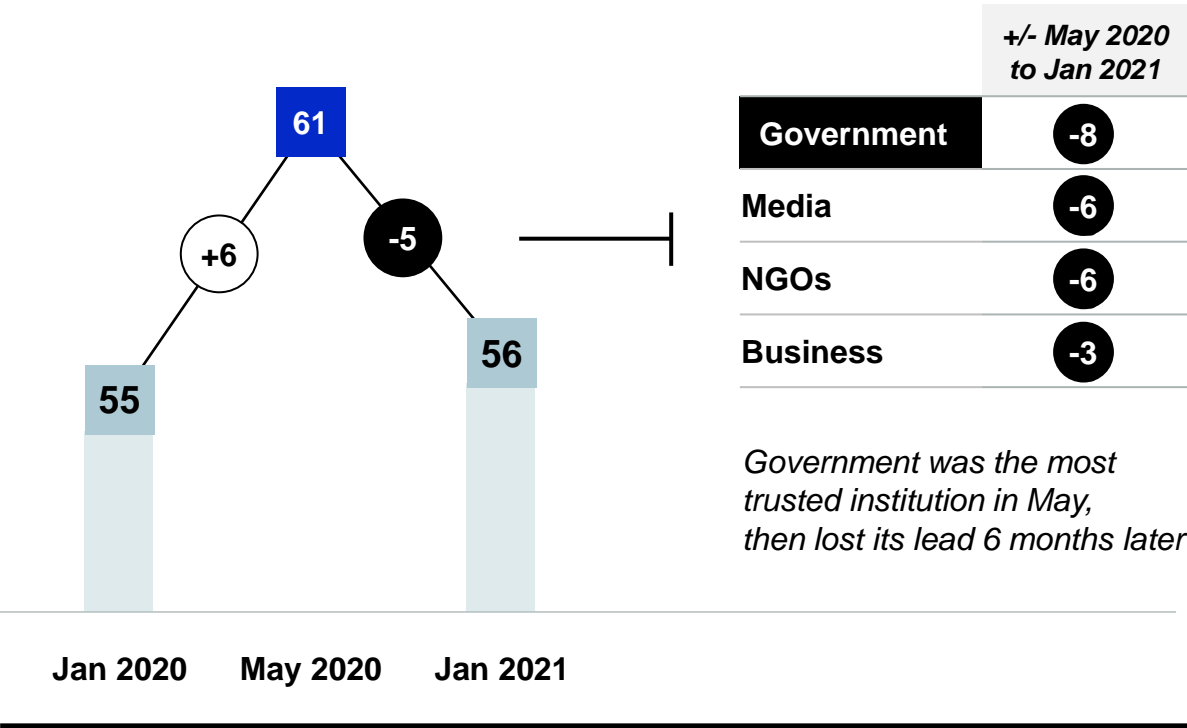
2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass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

SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

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



Global 11

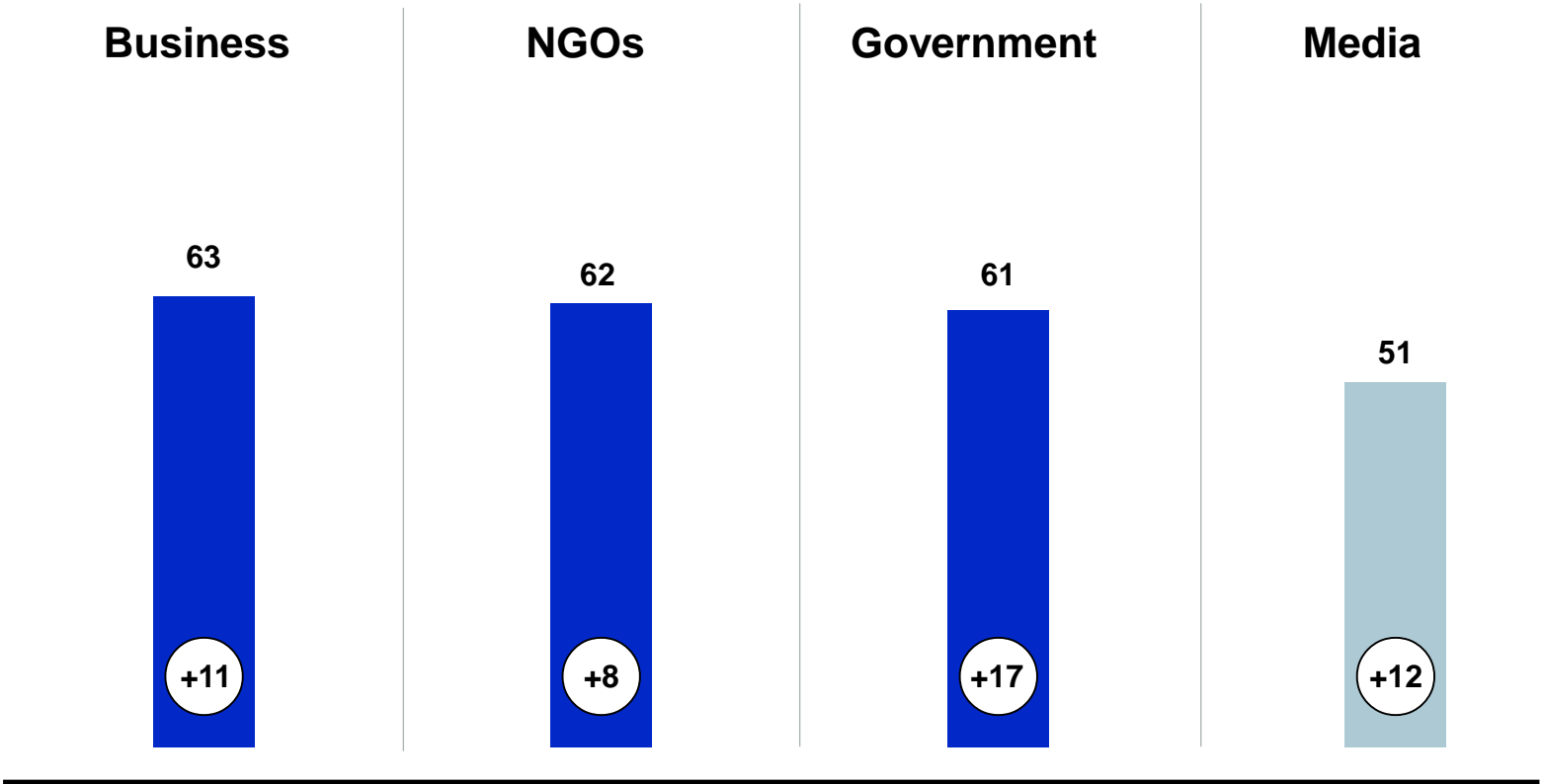
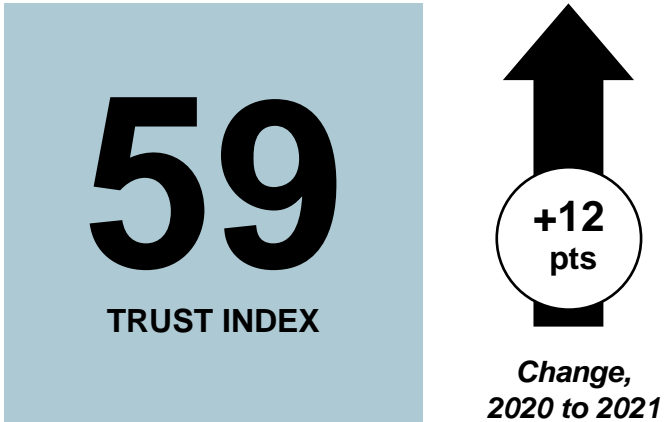


Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

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.

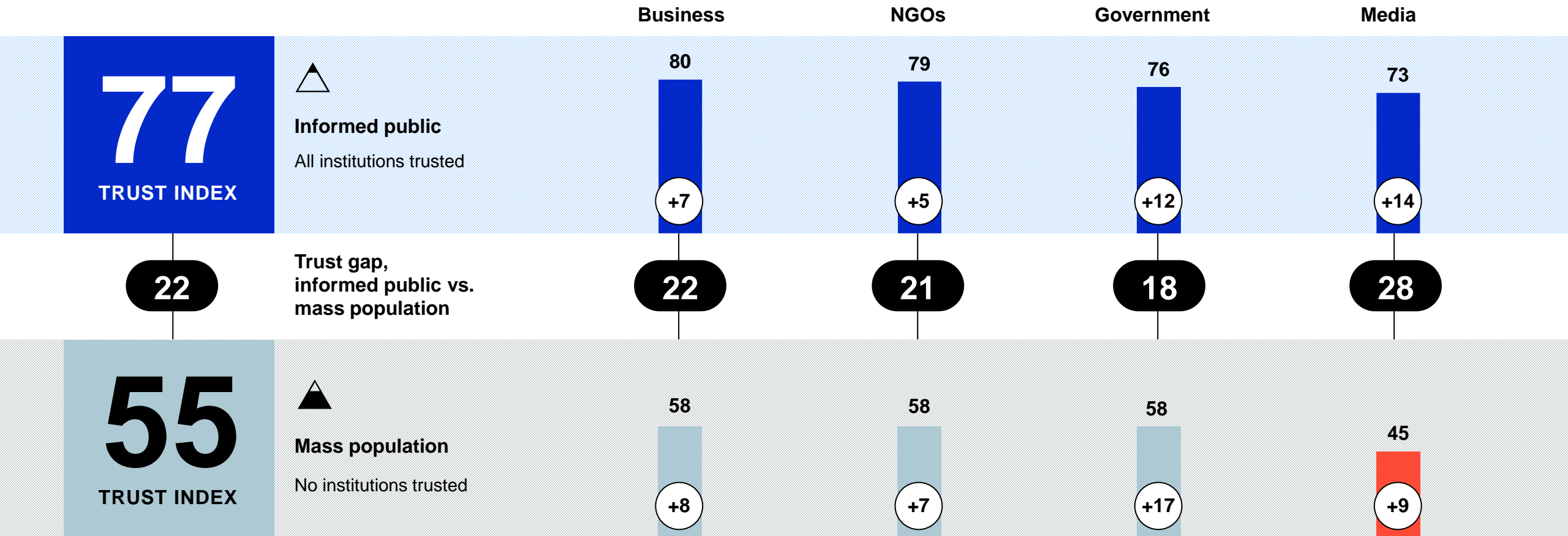
TRUST SURGE IN AUSTRALIA: BUSINESS, GOVERNMENT, NGOS NOW TRUSTED

Percent trust, in Australia



TWO DIFFERENT TRUST REALITIES IN AUSTRALIA

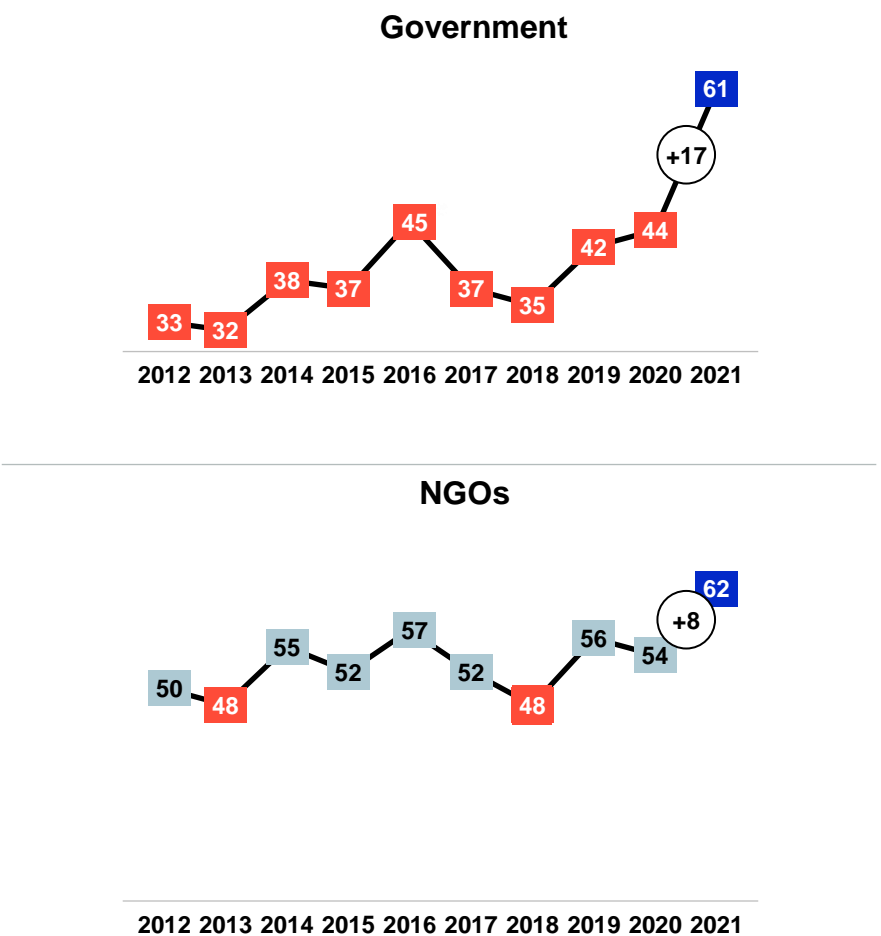
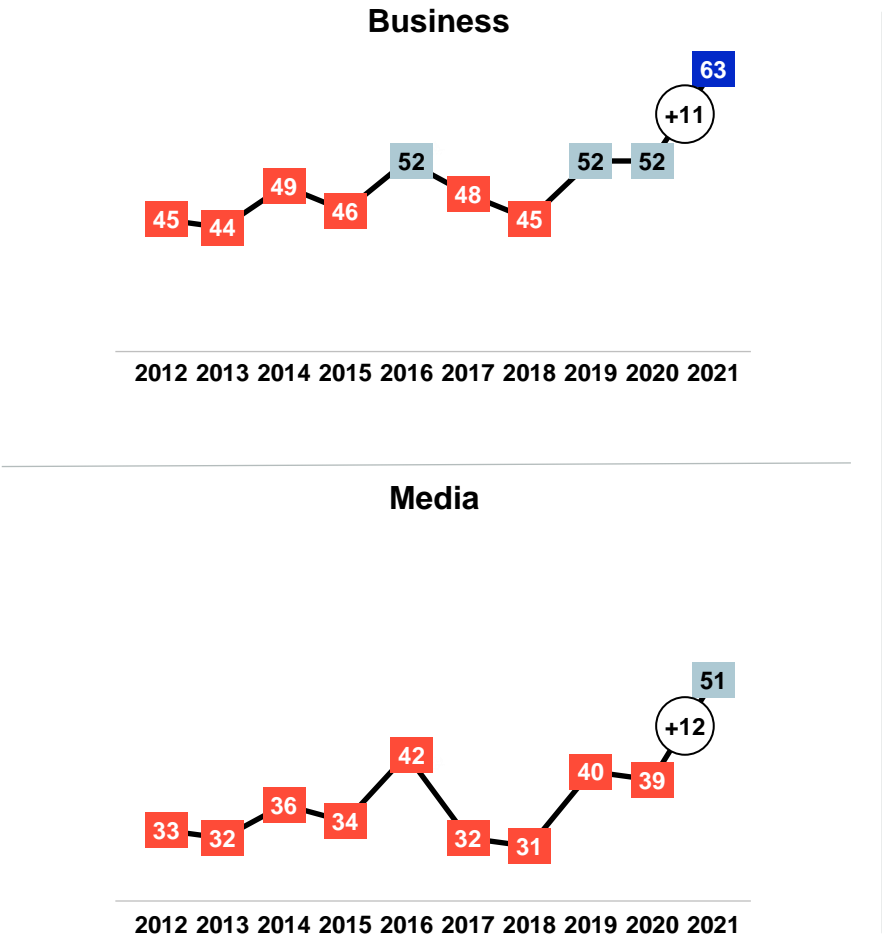
Percent trust, in Australia



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. Mass population and informed public, Australia.

RECORD TRUST HIGHS ACROSS THE BOARD

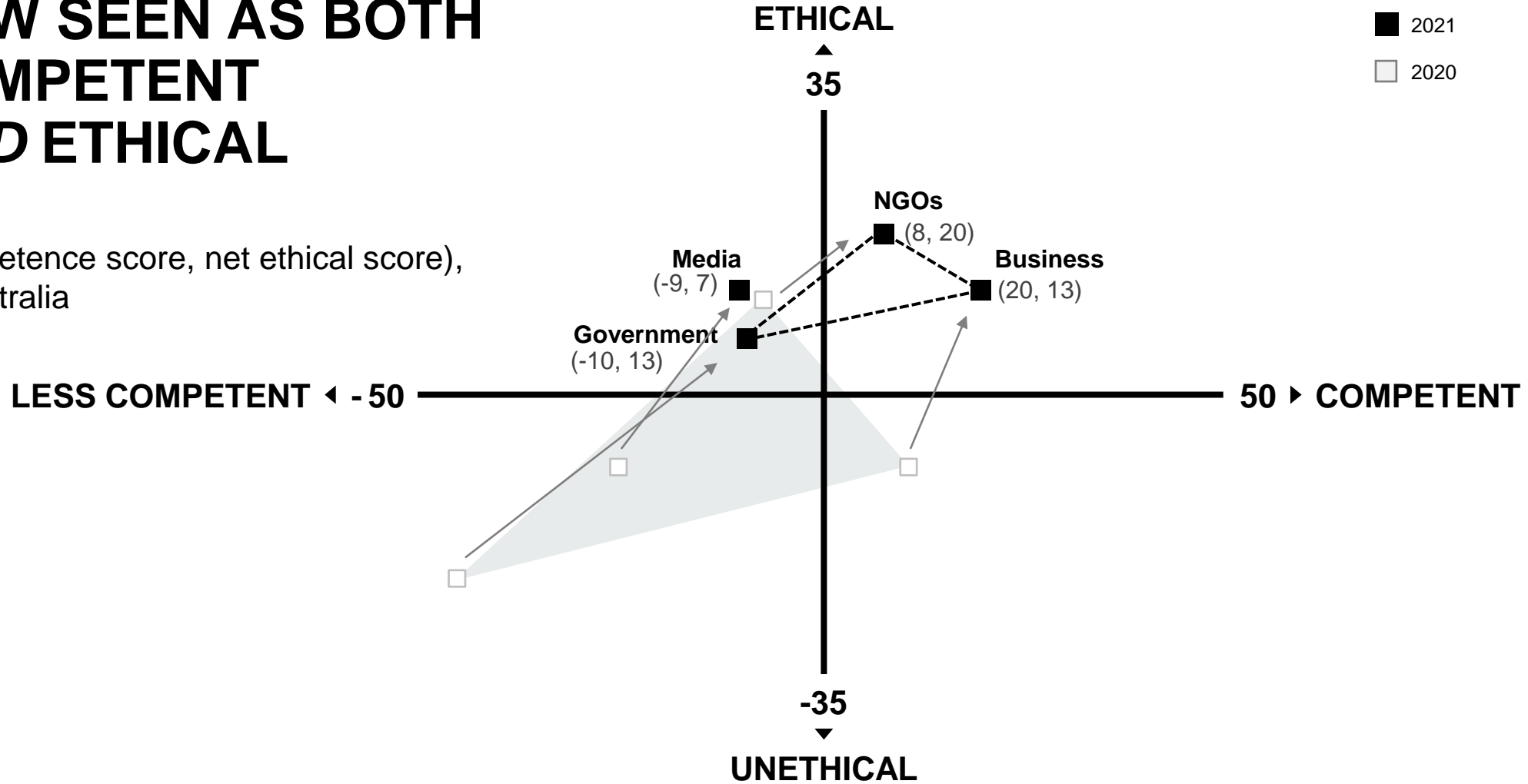
Percent trust in each institution



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, Australia.

BUSINESS AND NGOS NOW SEEN AS BOTH COMPETENT AND ETHICAL

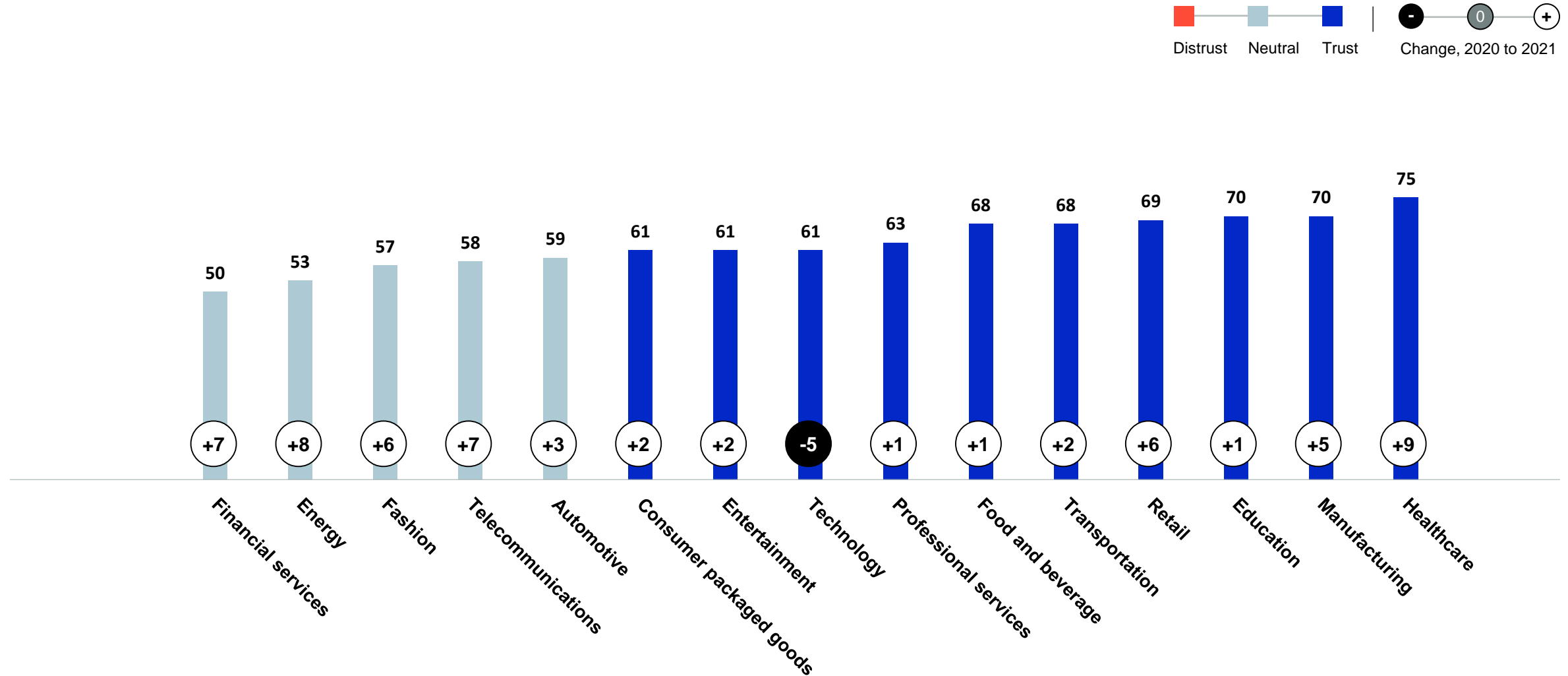
(Competence score, net ethical score),
in Australia



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, Australia. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

TRUST INCREASES IN ALL SECTORS BUT TECHNOLOGY

Percent trust in each sector, in Australia



INDUSTRY SECTORS OVER TIME

Percent trust in each sector, in Australia



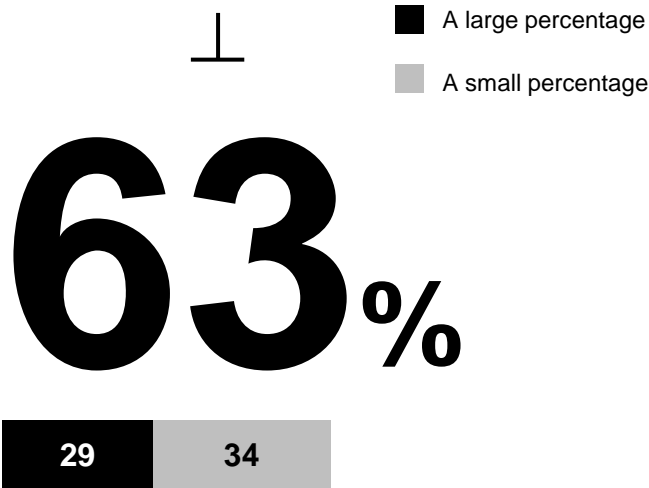
Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend
Healthcare	-	-	-	-	71	72	69	70	66	75	n/a
Food and beverage	67	63	68	67	68	70	67	74	67	68	+1
Consumer packaged goods	56	54	58	58	62	61	56	64	59	61	+5
Entertainment	-	61	64	66	66	63	61	70	59	61	n/a
Technology	74	65	73	71	72	71	68	72	66	61	-13
Automotive	58	58	60	59	55	61	54	64	56	59	+1
Telecommunications	47	45	48	50	55	54	53	53	51	58	+11
Energy	41	36	41	43	51	50	39	45	45	53	+12
Financial services	46	38	46	43	48	50	49	45	43	50	+4



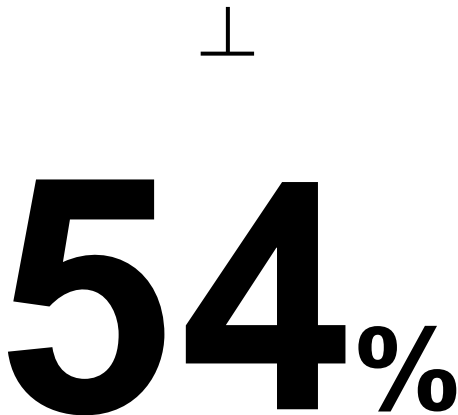
PANDEMIC ACCELERATES JOB LOSS FEARS

Percent who agree, in Australia

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



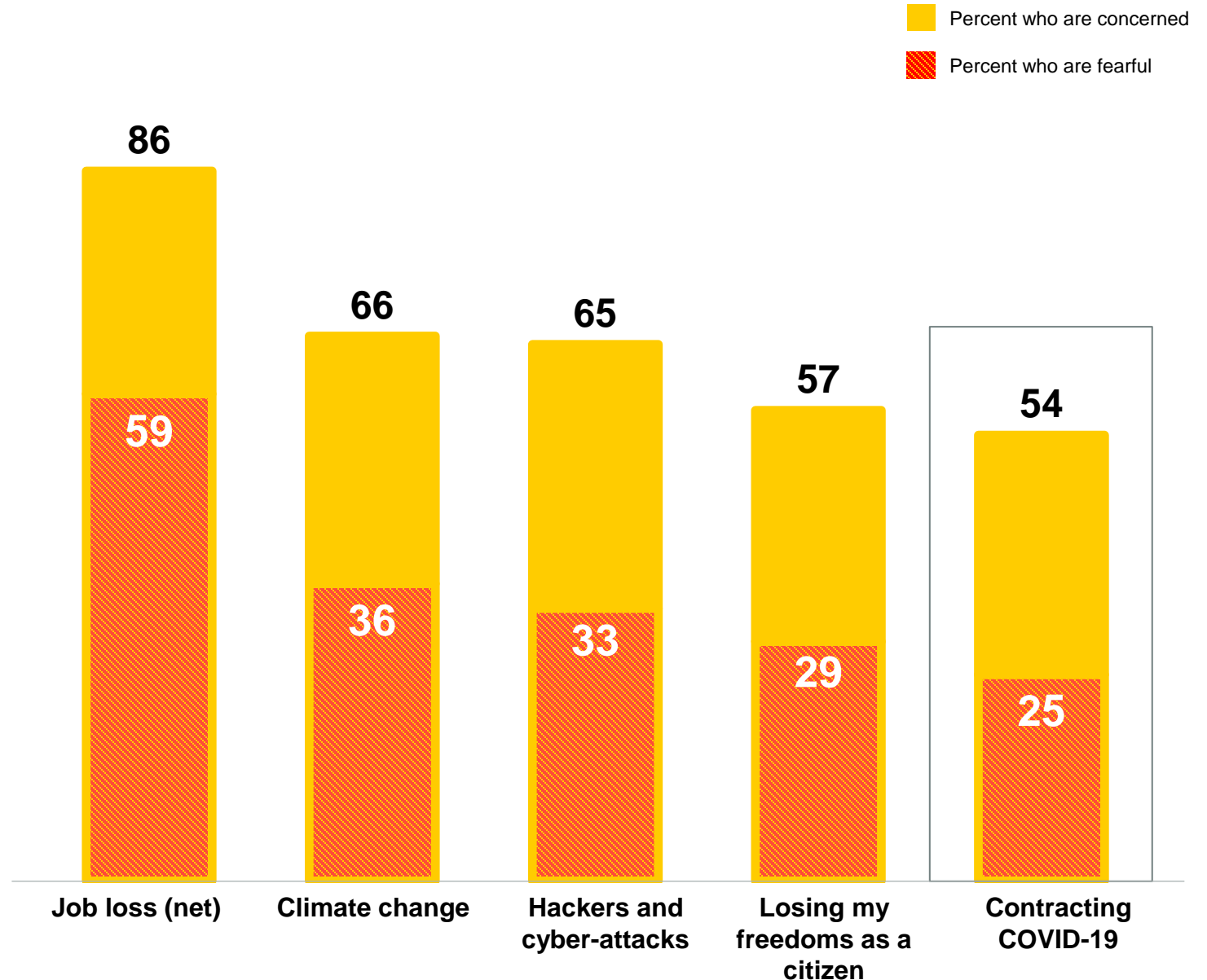
I worry that the pandemic will accelerate the rate at which companies **replace human workers with AI** and robots



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, Australia.

PANDEMIC ADDED TO PERSISTENT PERSONAL AND SOCIETAL FEARS

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



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, Australia. Job loss asked of those who are an employee (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.

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

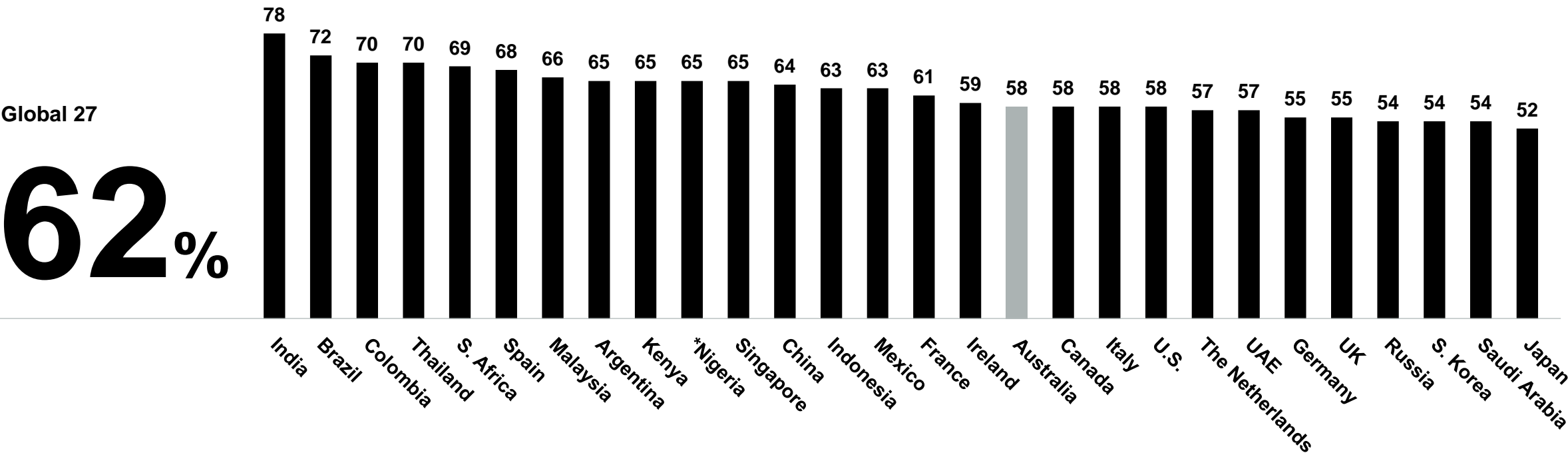


<i>Change in importance since last year, in Australia</i>	Net change	More Important	Less Important
Improving our healthcare system	+48	58	10
Addressing poverty in this country	+44	54	10
Finding ways to combat fake news	+42	53	11
Protecting people's individual freedoms	+39	49	10
Closing the economic and social divide	+36	48	12
Improving our education system	+34	45	11
Addressing climate change	+32	49	17
Addressing discrimination, racism	+28	42	14

PANDEMIC DEEPENS INEQUITIES AROUND THE WORLD

Percent who agree

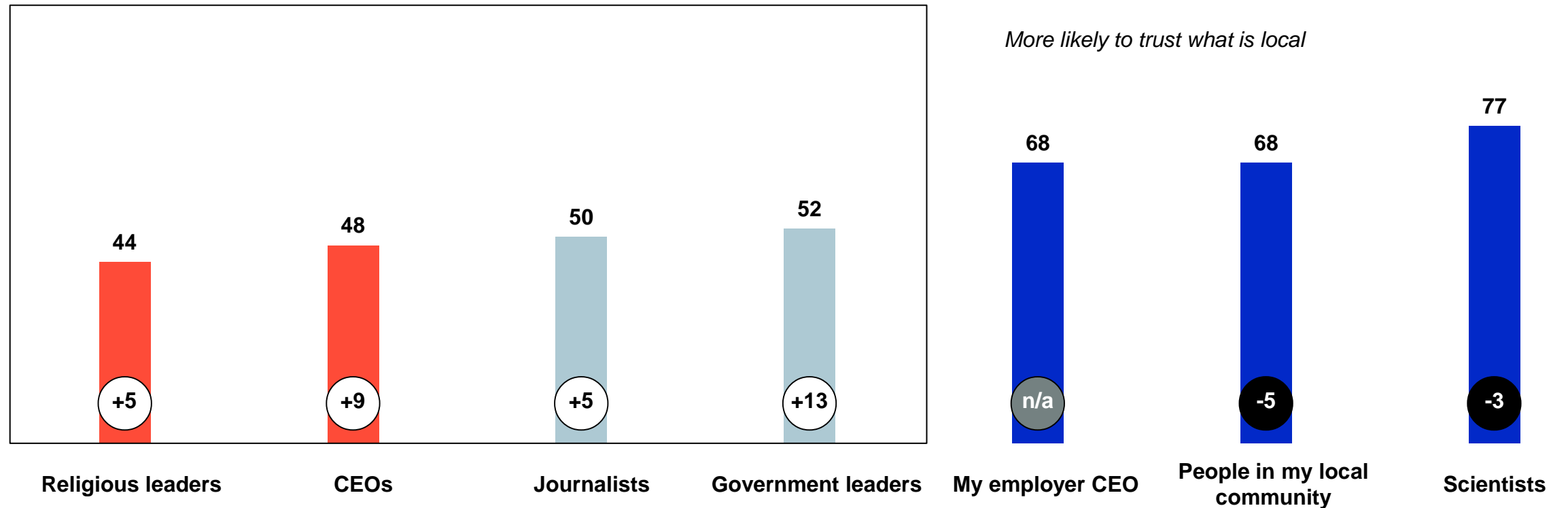
Those with **less education, less money and fewer resources are being unfairly burdened** with most of the suffering, risk of illness, and need to sacrifice due to the pandemic



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

TRUST SHIFTS IN LEADERS TO DO WHAT'S RIGHT

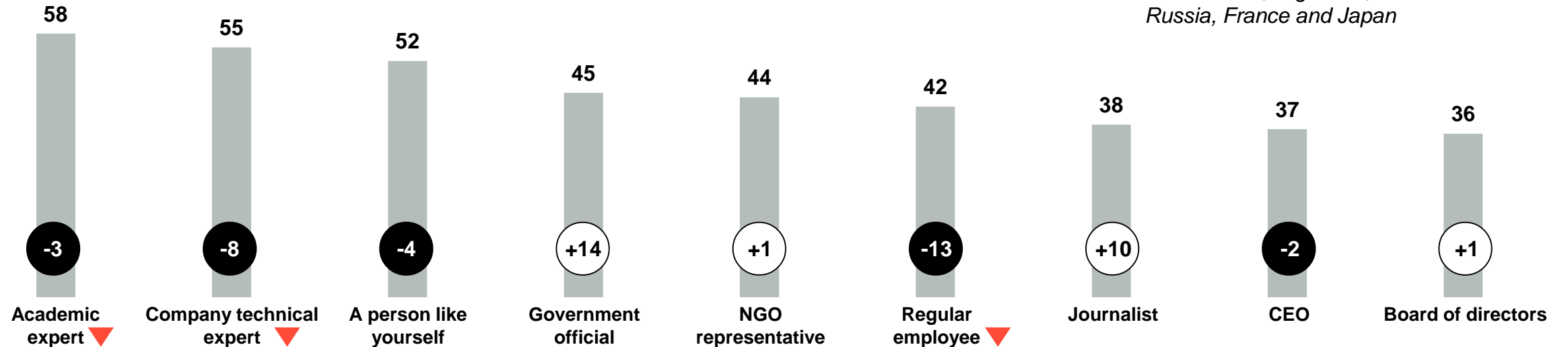
Percent trust, in Australia



INSTITUTIONAL SPOKESPEOPLE GAIN CREDIBILITY

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

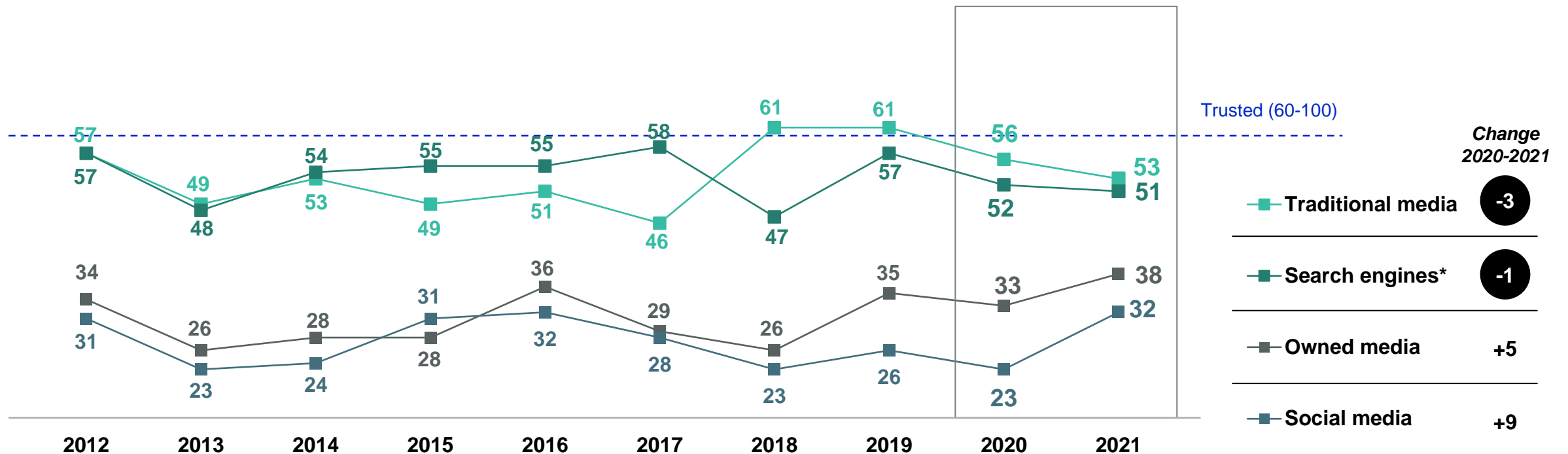
● — 0 — ● Change, 2020 to 2021 | ▼ All-time low



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. Question asked of half of the sample. General population, Australia.

NO MEDIA SOURCE TRUSTED

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



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, Australia.

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

NEWS ORGANISATIONS SEEN AS BIASED

Percent who agree, in Australia

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

64%

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

68%

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

59%

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, Australia.

PRIORITIES SHIFT: MY INFORMATION LITERACY NOW MATTERS MORE

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

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

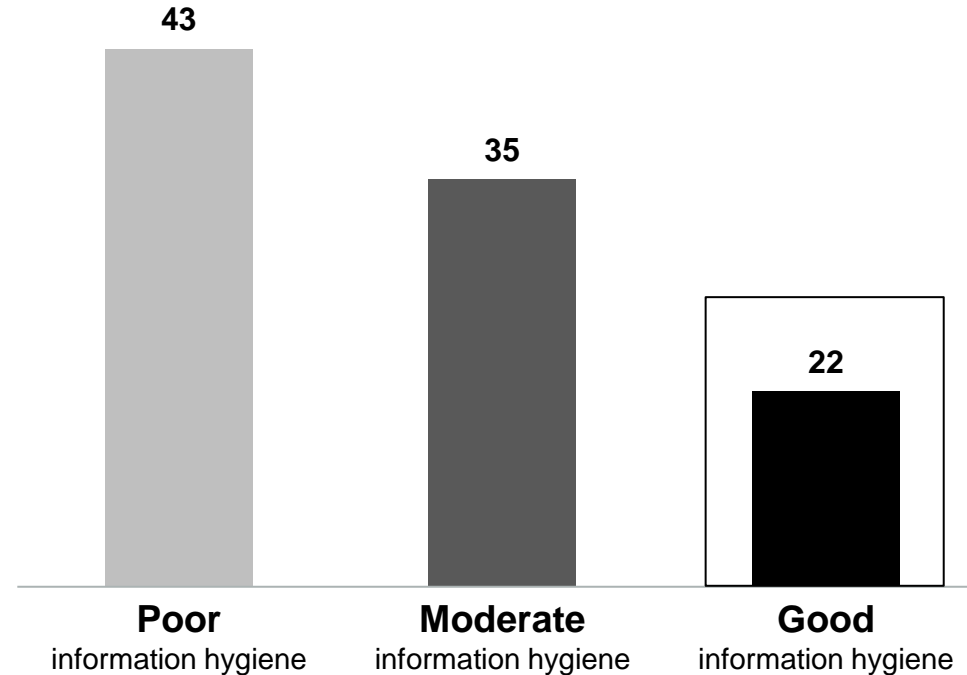
<i>Change in importance since the start of the year, in Australia...</i>	Net change	More Important	Less Important
Prioritizing my family and their needs	+44	54	10
Being politically aware	+33	44	11
Increasing my media and information literacy	+30	41	11
Increasing my science literacy	+23	37	14
Speaking out when I see need for changes and reforms	+22	35	13

IN AUSTRALIA, LESS THAN 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 24%** have good information hygiene

BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Percent who agree, in Australia

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

⊥
66%

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

⊥
72%

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

⊥
78%

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. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Australia.

CONSUMERS AND EMPLOYEES EXPECTED TO HAVE A SEAT AT THE TABLE

Percent who agree, in Australia

73%

Consumers ...

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

66%

Employees ...

59% of those who
are employed

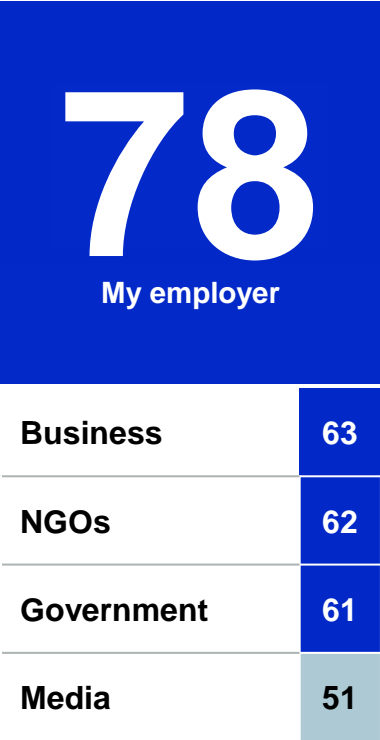
I am more likely now than a year
ago to voice my objections to
management or **engage in
workplace protest**

TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

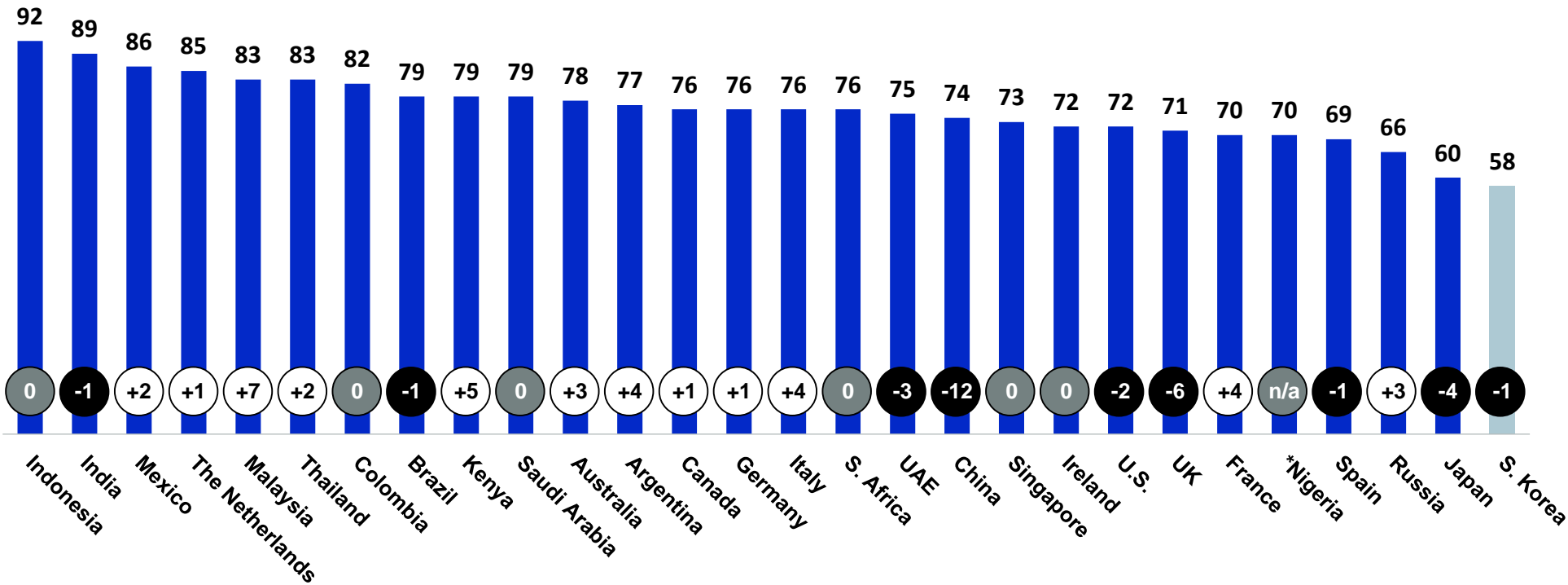
Percent trust in my employer



Australia

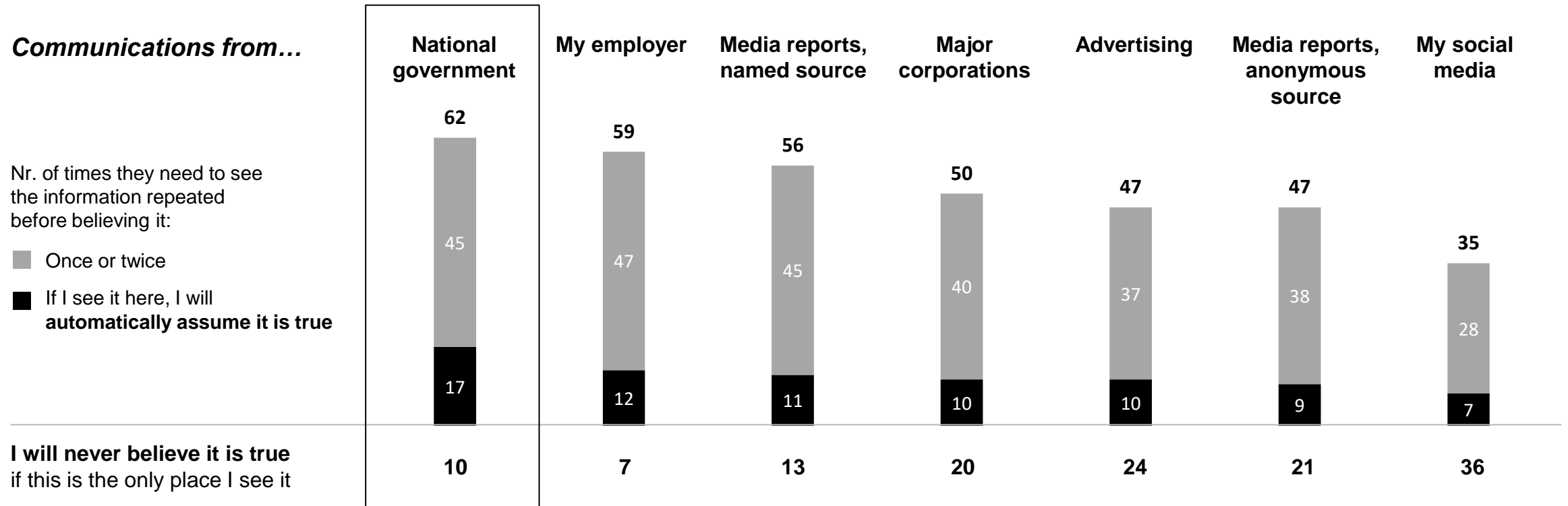


Trust in my employer stable or rising in 18 of 27 countries



BEHIND GOVERNMENT, EMPLOYERS EMERGE AS MOST TRUSTED

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



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

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



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

	Net change	More Important	Less Important
Keep workers, customers safe	+45	57	12
Regular employee communications	+44	54	10
Job skills training programs	+39	51	12
Diverse, representative workforce	+32	46	14

BUSINESS GAINS THE MOST TRUST BY BEING A GUARDIAN OF INFORMATION QUALITY

Percent increased likelihood of trusting business associated with performing well on each action

<i>When these actions are performed well...</i>	Increased likelihood of trust
Guarding information quality	+5.8%
Embracing sustainable practices	+5.7%
Robust COVID-19 health and safety response	+4.8%
Driving economic prosperity	+4.7%
Long-term thinking over short-term profits	+4.6%

USE IT OR LOSE IT

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 empathise 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.

1 Ruby Princess cruise ship departs Sydney: *James D. Morgan/Getty Images* **2** Prime Minister Scott Morrison announces further measures to stop the spread of COVID-19: *Sam Mooy/Getty Images* **3** COVID-19 application: *Daria Nipot/Shutterstock* **4** New South Wales Firefighters battling blaze: *Karl Hofman/Shutterstock* **5** Protests in Hyde Park to change the controversial date of Australia day: *Holli/Shutterstock* **6** Woman wearing a mask on a Melbourne tram: *Dave Hewinson/Shutterstock* **7** Vehicles waiting at COVID-19 checkpoint to cross the state border into Queensland: *Igor Corovic/Shutterstock* **8** Victorian Premier Daniel Andrews holds a press conference during Stage 3 lockdowns: *Darrian Traynor/Getty Images* **9** Stage 3 COVID-19 restriction warnings in Melbourne: *Dave Hewinson/Shutterstock* **10** Sydney Opera House with light display: *Srikant Sahoo/Shutterstock*.

