2019 EDELMAN
TRUST BAROMETER

Expectations for CEOs

#TrustBarometer

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trustbarometer
2019 | ANNUAL GLOBAL STUDY

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19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

All fieldwork was conducted between October 19 and November 16, 2018

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% (26,000+), half-sample global general online population +/- 0.8 (N=15,525).

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 739, varies by market).
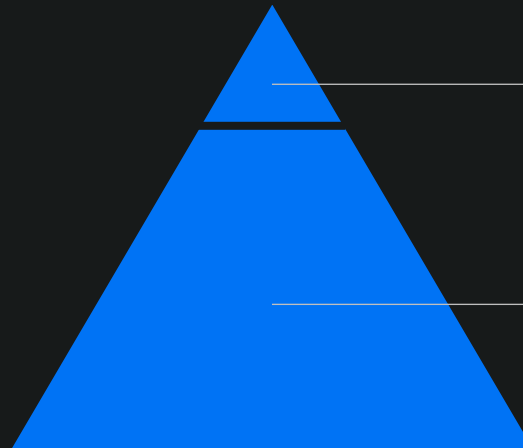
Employee MOE: 27-market = +/- 0.8% (N=16,944)
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

General Online Population

1,150 respondents per market

Ages 18+

All slides show general online population data unless otherwise noted

Informed Public △

500 respondents in U.S. and China; 200 in all other markets

Represents 16% 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 84% of total global population

2019 Focus on Employer-Employee Relationship

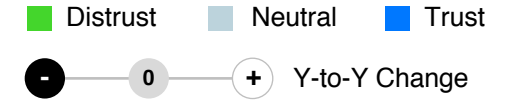55% of global general population are full- or part-time employees (but not self-employed)

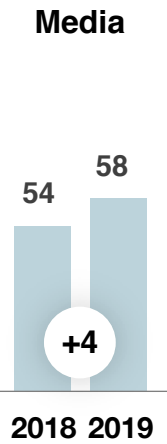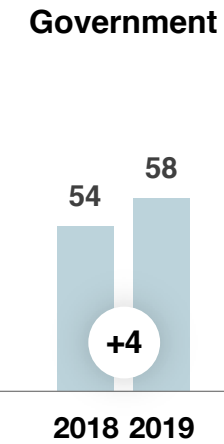Oversample of employees of multinational companies: 500 respondents per market

CEOs
Must Lead

A MODEST RISE IN TRUST

Percent trust

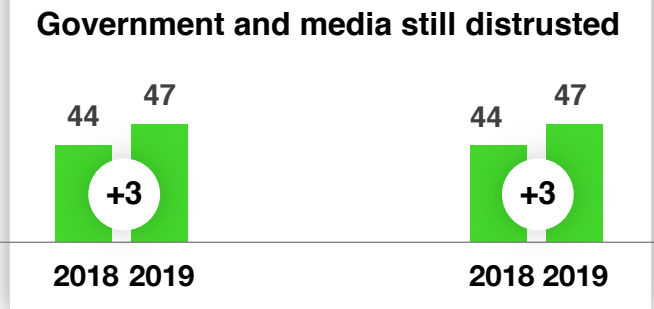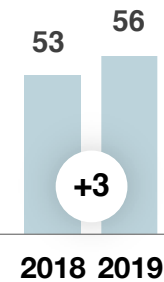- ─ 0 ─ + Y-to-Y Change

	NGOs	Business	Government	Media
Informed public	65 → 69 (+4)	64 → 68 (+4)	54 → 58 (+4)	54 → 58 (+4)
2018 2019	2018 2019	2018 2019	2018 2019	2018 2019

△ Informed public

NGOs: 65 (2018), 69 (2019), +4
Business: 64 (2018), 68 (2019), +4
Government: 54 (2018), 58 (2019), +4
Media: 54 (2018), 58 (2019), +4

▲ General population

NGOs: 54 (2018), 56 (2019), +2
Business: 53 (2018), 56 (2019), +3

Government and media still distrusted

Government: 44 (2018), 47 (2019), +3
Media: 44 (2018), 47 (2019), +3
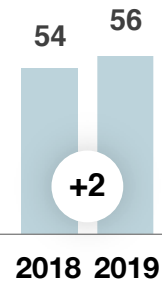
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DISTRUST CONTINUES

Trust Index

Global Trust Index increases 3 pts to neutral

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15 of 26 markets are distrusters, down 3 from 2018
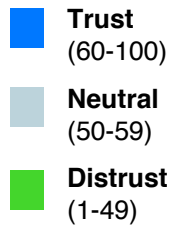

▲ 2018 General Population		▲ 2019 General Population	
49	**Global 26**	**52**	**Global 26**
74	China	79	China
71	Indonesia	73	Indonesia
68	India	72	India
66	UAE	71	UAE
58	Singapore	62	Singapore
54	Mexico	59	Malaysia
54	The Netherlands	58	Mexico
53	Malaysia	56	Canada
49	Canada	55	Hong Kong
47	Argentina	54	The Netherlands
47	Colombia	52	Colombia
47	Spain	49	U.S.
46	Turkey	48	Australia
45	Hong Kong	46	Argentina
44	Brazil	46	Brazil
44	S. Korea	46	Italy
43	Italy	46	S. Korea
43	U.S.	45	S. Africa
41	Germany	45	Turkey
40	Australia	44	France
40	France	44	Germany
39	U.K.	43	U.K.
38	Ireland	42	Ireland
38	S. Africa	40	Spain
37	Japan	39	Japan
36	Russia	29	Russia

Trust (60-100)
Neutral (50-59)
Distrust (1-49)

Biggest changes in

Hong Kong	+10
Australia	+8
Canada	+7
S. Africa	+7
Russia	-7
Spain	-7

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FEARS OF JOB LOSS REMAIN HIGH

Percent of employees who worry about job loss due to each issue
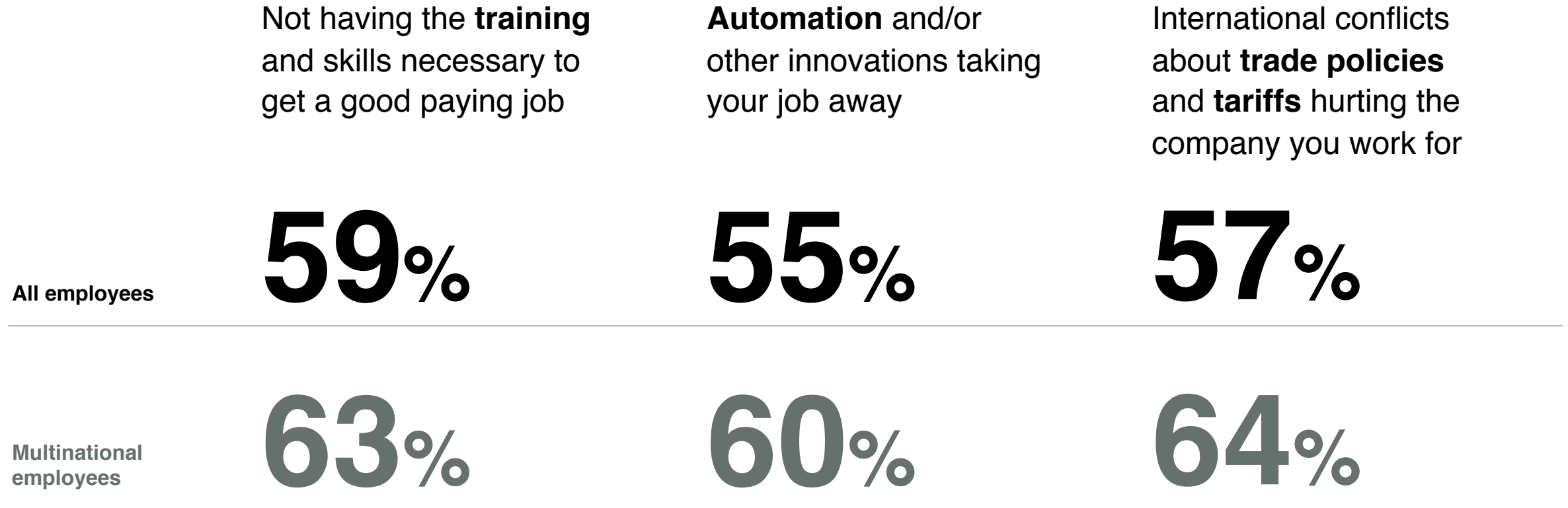
	Not having the **training** and skills necessary to get a good paying job	**Automation** and/or other innovations taking your job away	International conflicts about **trade policies** and **tariffs** hurting the company you work for
All employees	**59%**	**55%**	**57%**
Multinational employees	**63%**	**60%**	**64%**

STRONG DESIRE FOR CHANGE
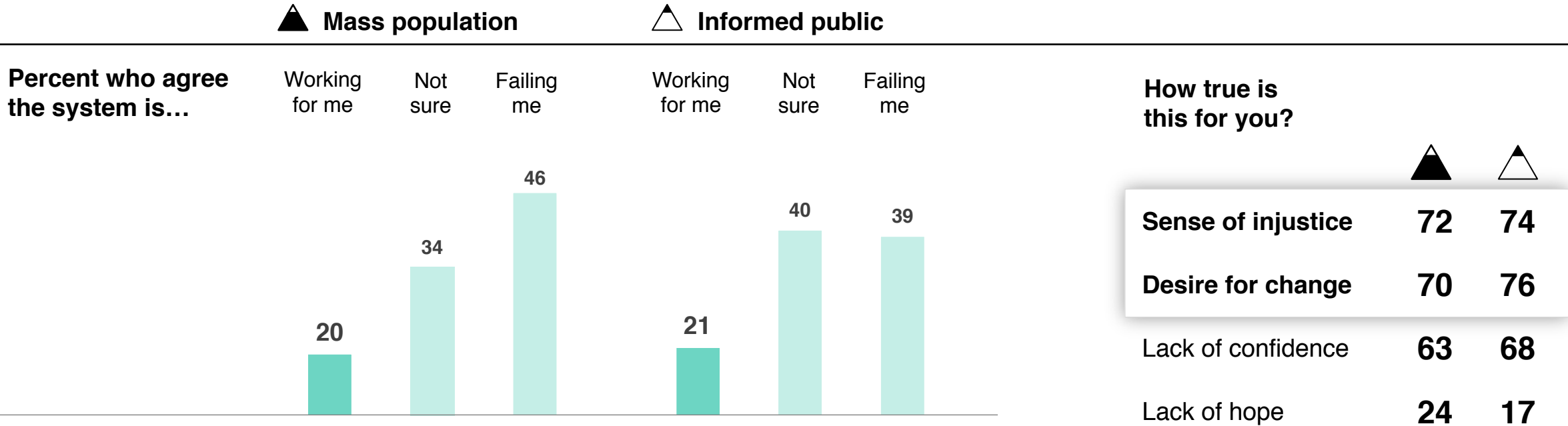
▲ **Mass population**   △ **Informed public**

Percent who agree the system is…

	Working for me	Not sure	Failing me	Working for me	Not sure	Failing me
Mass population	20	34	46			
Informed public				21	40	39

How true is this for you?

	▲	△
Sense of injustice	**72**	**74**
Desire for change	**70**	**76**
Lack of confidence	**63**	**68**
Lack of hope	**24**	**17**

SOCIETY EXPECTS CEOS TO LEAD CHANGE

Percent who say that CEOs should **take the lead on change** rather than waiting for government to impose it

76% ↑ +11pts

Percent who agree CEOs can create positive change in:

Equal pay	65
Prejudice and discrimination	64
Training for the jobs of tomorrow	64
The environment	56
Personal data	55
Sexual harassment	47
Fake news	37
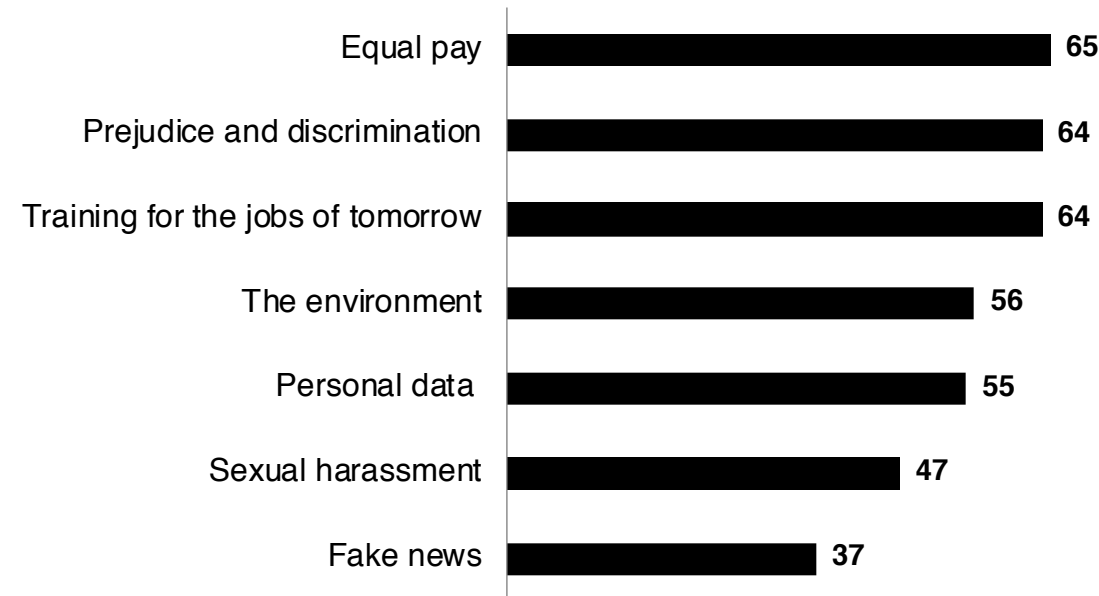
Expectations
of Leaders

STRONG DESIRE
FOR SPONTANEITY
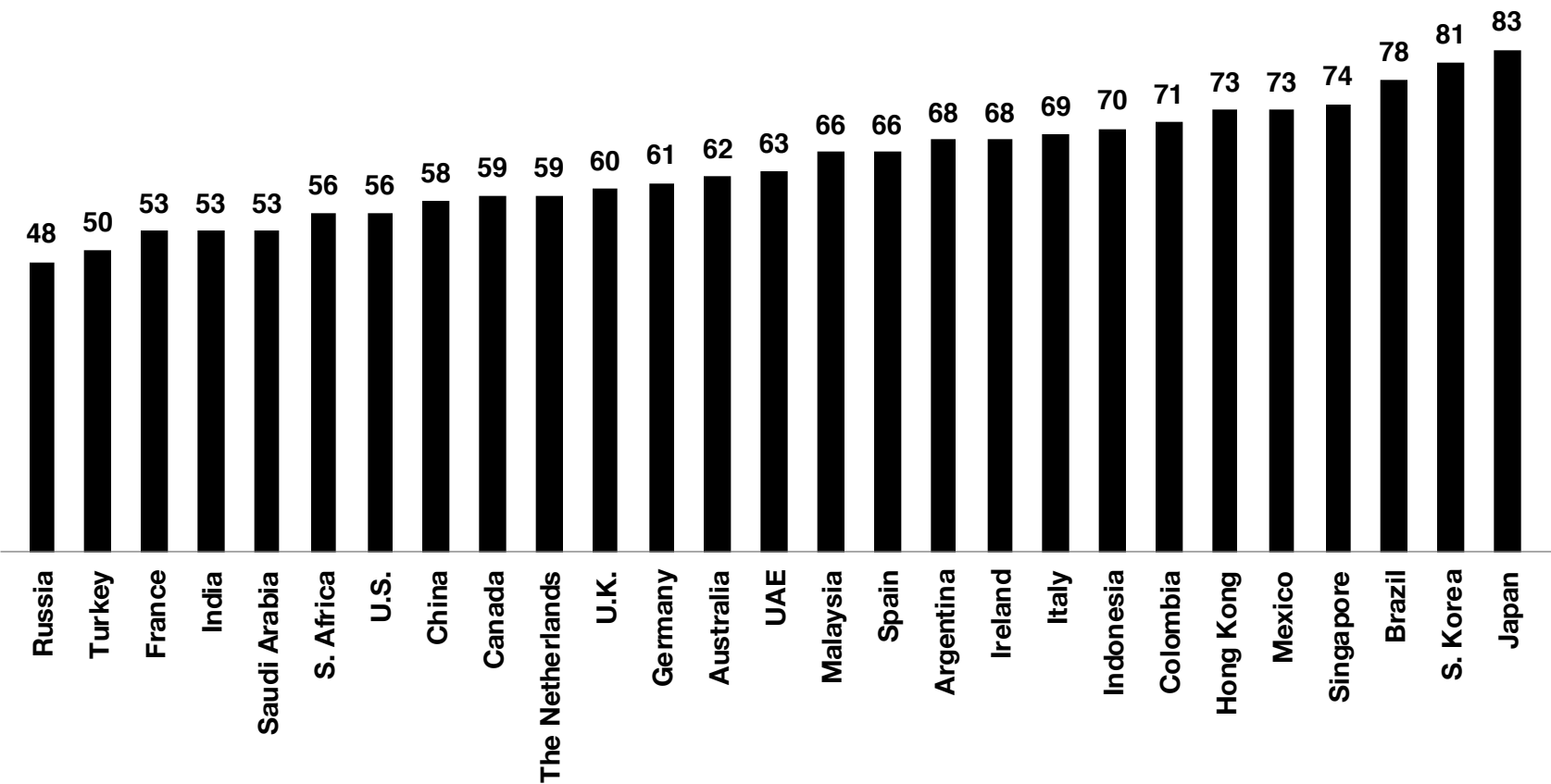
Percent who say each characteristic best describes the type of
business leader they would trust to lead us into a better future

Greater preference for spontaneous speakers
among 55+ age group
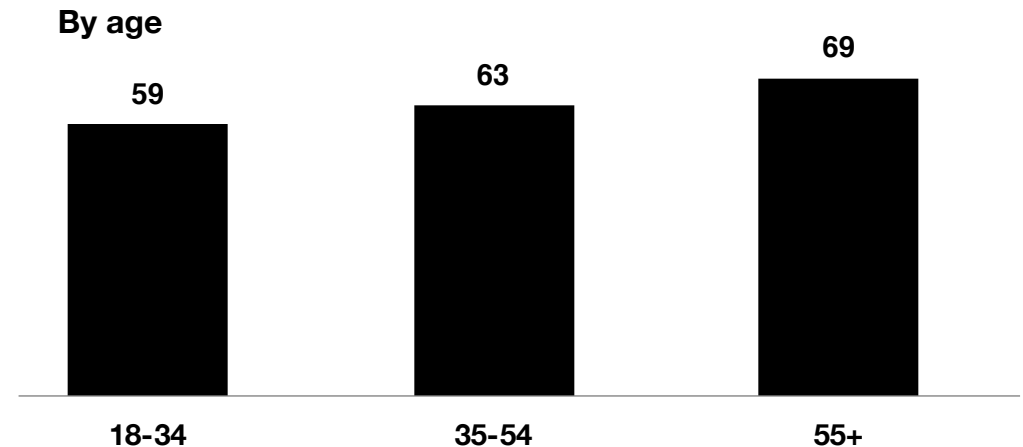
By age

37% | **vs.** | **63**%

They **deliver well-
rehearsed speeches** | | They **speak
spontaneously**

18-34	35-54	55+
59	63	69

LOOKING FOR CEOS TO MODEL WORK/LIFE BALANCE

Percent who say each characteristic best describes the type of business leader they would trust to lead us into a better future

36%

They **work long hours, weekends and rarely take vacation**

vs.

64%

They **prioritize work life balance**

Country	Value
Russia	48
Turkey	50
France	53
India	53
Saudi Arabia	53
S. Africa	56
U.S.	56
China	58
Canada	59
The Netherlands	59
U.K.	60
Germany	61
Australia	62
UAE	63
Malaysia	66
Spain	66
Argentina	68
Ireland	68
Italy	69
Indonesia	70
Colombia	71
Hong Kong	73
Mexico	73
Singapore	74
Brazil	78
S. Korea	81
Japan	83

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EMPLOYEES QUESTION CEO ETHICS

Percent who say this is important when considering an organization as a potential place of employment vs. those who say their current employer is doing this

■ Employee expectation

■ Employer performance

They question your honesty

Performance Gap

Management always
tells the truth

79
55

24pt gap

They question your values

CEO embodies
organization's values

74
60

14pt gap

They don't see you speaking up

CEO speaks
publicly on controversial
political and social issues

54
48

6pt gap

CEOS LESS CREDIBLE THAN OTHER VOICES

Percent who rate each source as very/extremely credible
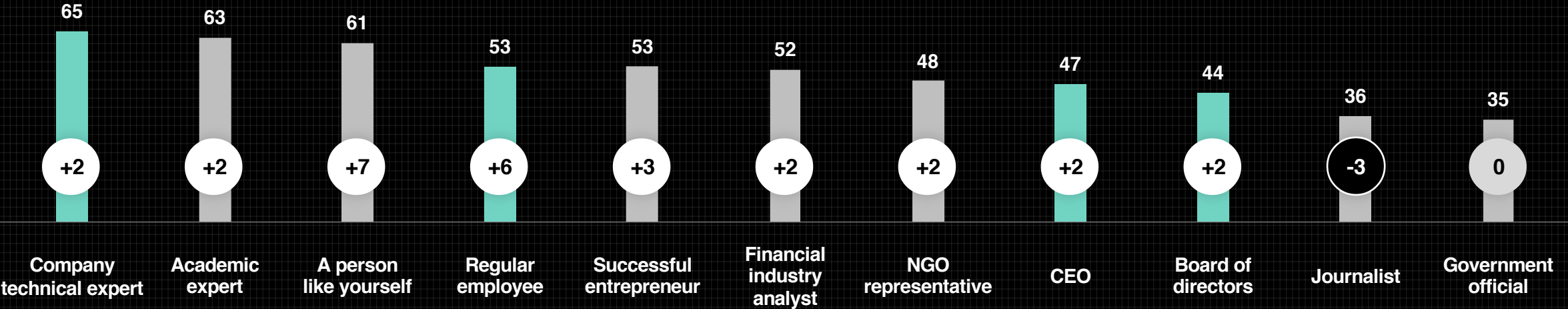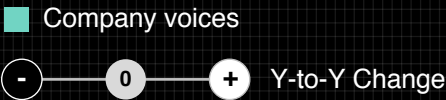
■ Company voices

- ──O── + Y-to-Y Change

Company technical expert	Academic expert	A person like yourself	Regular employee	Successful entrepreneur	Financial industry analyst	NGO representative	CEO	Board of directors	Journalist	Government official
65	63	61	53	53	52	48	47	44	36	35
+2	+2	+7	+6	+3	+2	+2	+2	+2	-3	0

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New Rules for Authentic Leadership

SPEAK UP ON ISSUES

Percent who say this is important when considering an organization as a potential place of employment

Globally,

54%

CEO speaks publicly on controversial political and social issues that I care about

Expectation that CEOs speak out **highest among upper management**

Non-management employee	Middle management	Upper management
48	61	68

SHOW UP FOR EMPLOYEES

71%

of employees agree
**It's critically important for my CEO
to speak out** on one or more of the
following:

- Industry issues

- Political events

- National crises

- Employee-driven issues

BE PERSONAL

Percent who say it is important to have information on each of the
following aspects of the CEO's personal life outside of their business

79%

say knowing the CEO's
personal values is
important to building trust

71%

say knowing the
**obstacles the CEO overcame
to become successful** is
important to building trust

67%

say knowing the CEO's
personal success story is
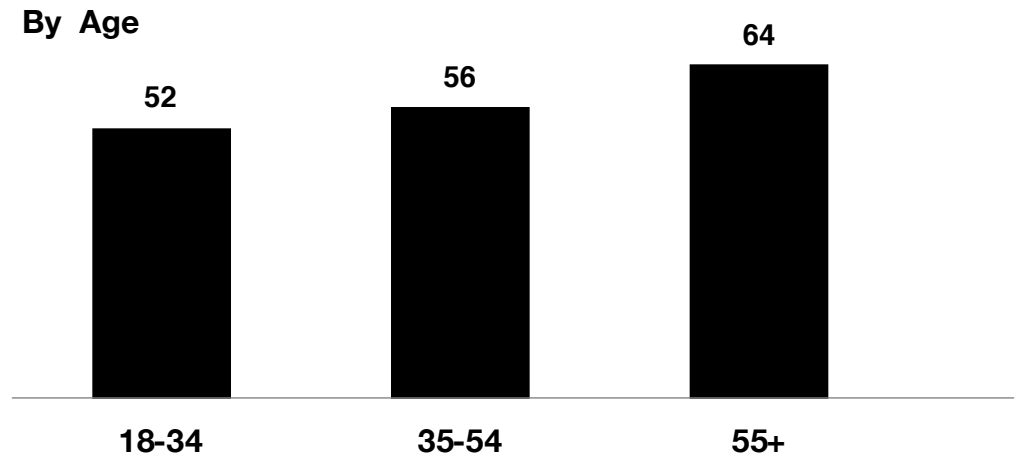important to building trust

BE RELATABLE

Percent who say each characteristic best describes the type of business leader they would trust to lead us into a better future

44% vs. **56**%

They **speak like a highly educated person**

They **speak like regular people**

Greater preference for relatability
among 55+ age group

By Age

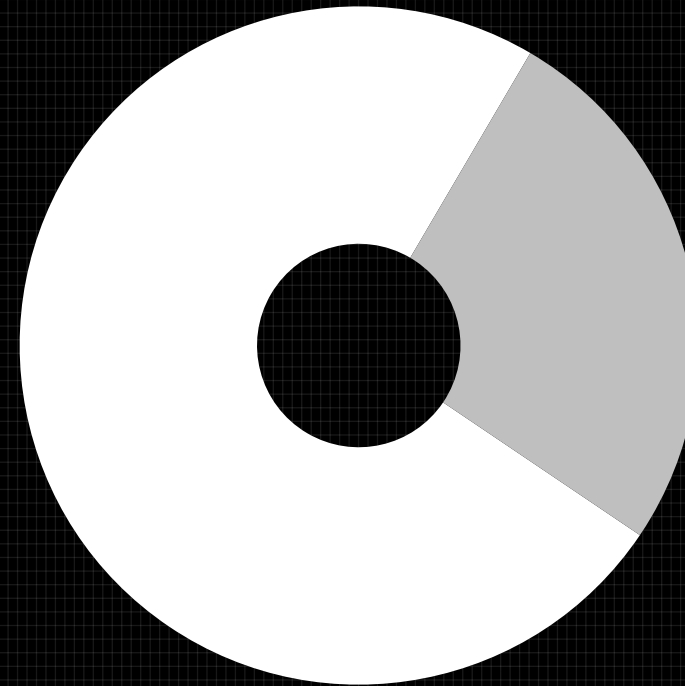| 18-34	35-54	55+
52	56	64

LEAD WITH FACTS

Percent who say they would trust CEOs to lead them to a better future if …

26%

VS.

They follow their instincts

74%

They make **decisions based on data and research**

GO DIRECT

Percent who agree

Globally,

63%

CEOs should regularly communicate directly to the public using social media

+11pts

Country	Percent
Japan	49
Germany	50
U.K.	52
Russia	53
Australia	56
France	56
Ireland	56
U.S.	56
Argentina	57
Italy	57
Canada	58
Spain	58
Colombia	61
The Netherlands	61
Hong Kong	65
Singapore	66
S. Africa	66
Mexico	68
S. Korea	70
Turkey	71
UAE	72
Brazil	73
Malaysia	73
Indonesia	78
India	80
China	81
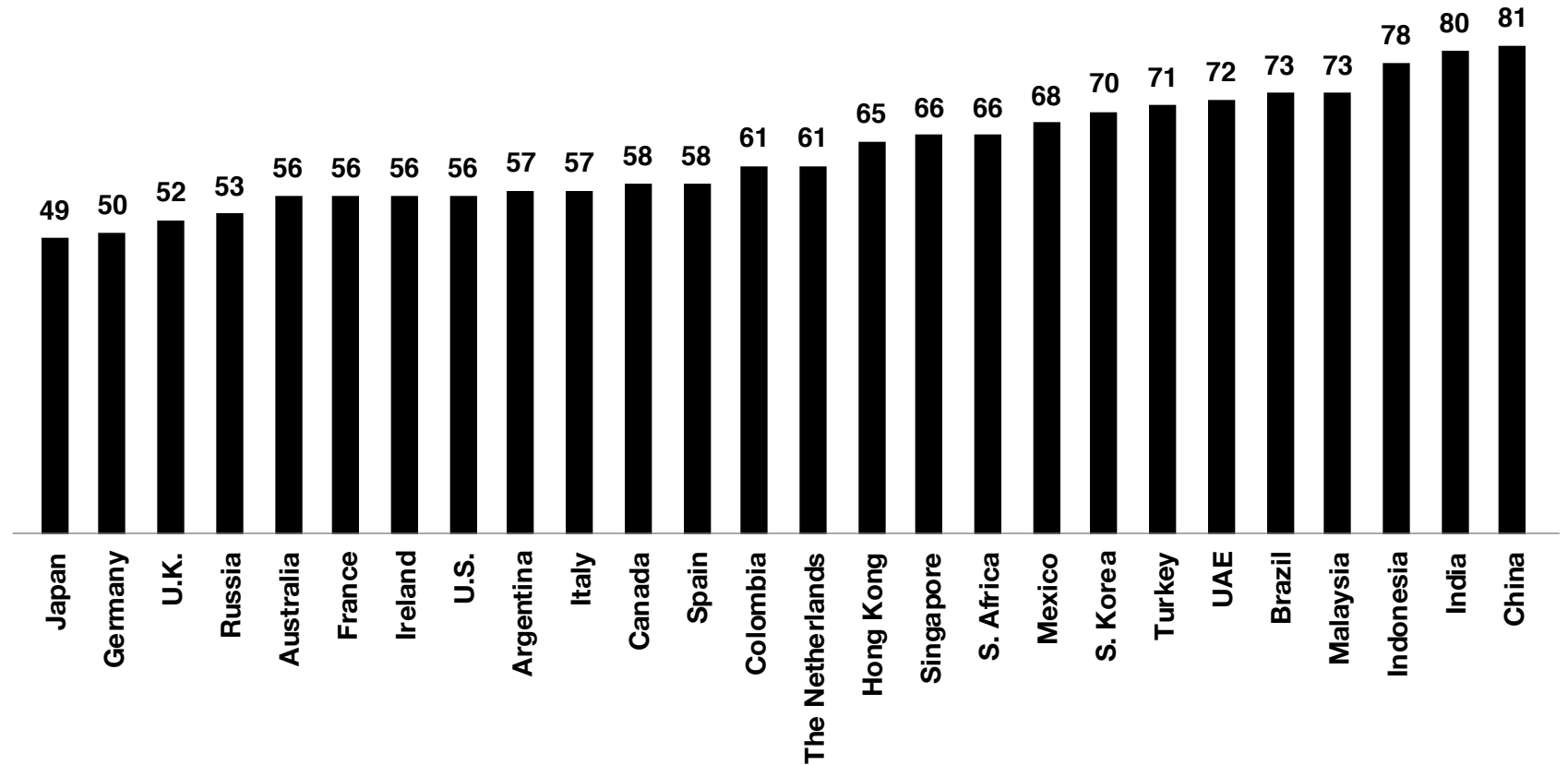
LEADERSHIP IMPERATIVES FOR CEOS

Speak Up

Take the lead on change

Focus on issues that matter most to stakeholders

Put Employees First

Embody and communicate your organization's values

Model work/life balance

Be Genuine

Share your personal values and backstory

Speak spontaneously and back up with facts