2019 EDELMAN TRUST BAROMETER

Trust in Technology

#TrustBarometer

Edelman trustbarometer 2019 | ANNUAL GLOBAL STUDY

Edelman

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).

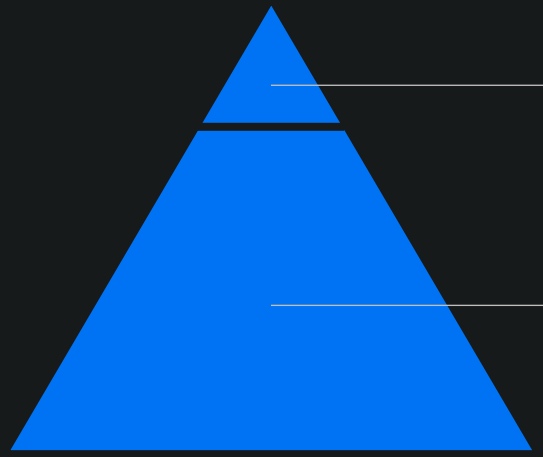
Employee MOE: 27-market = +/- 0.8% (N=16,944)
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

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

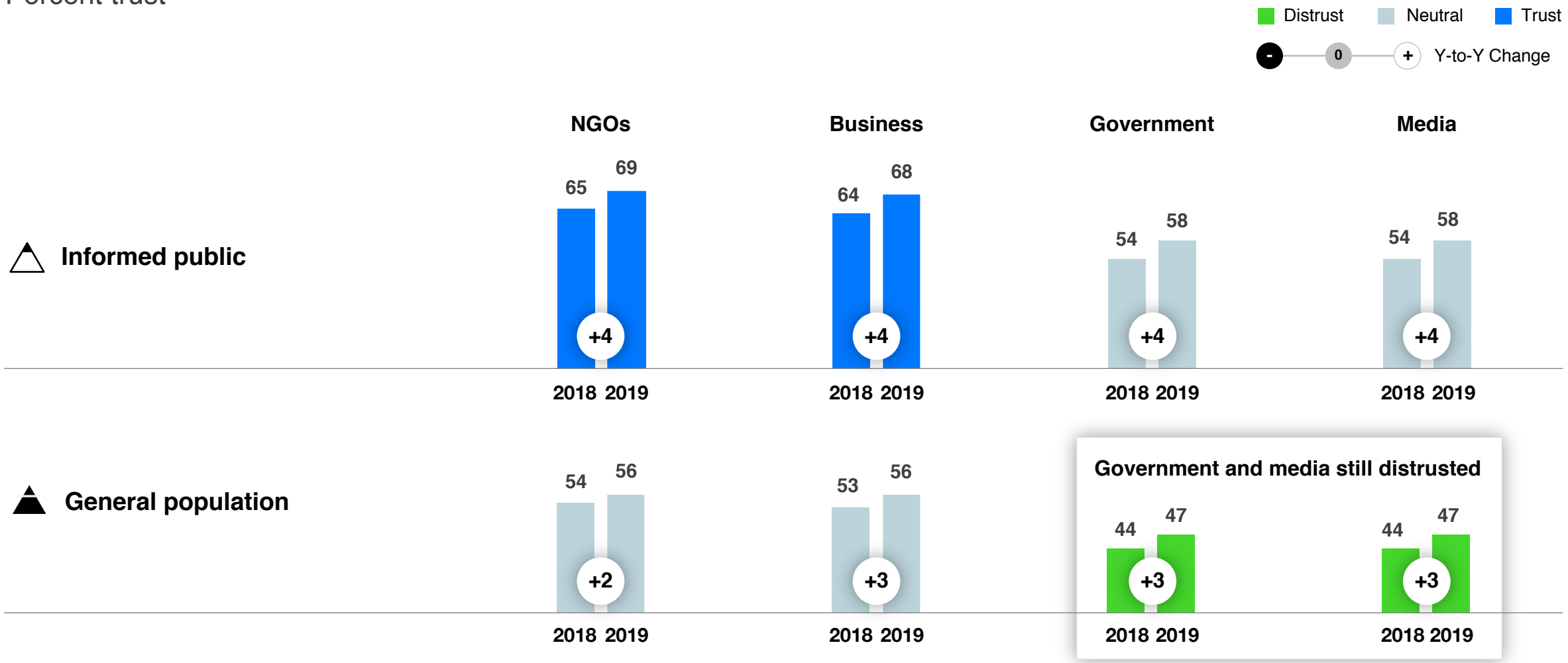
2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed); 4% are technology employees

Oversample of employees of multinational companies: 500 respondents per market

A MODEST RISE IN TRUST

Percent trust



2019 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 using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. Informed public and general population, 26-market average.

2018: YEAR OF THE TECHLASH

FT Series **Year in a Word 2018**

Opinion **Language and grammar**

Year in a Word: Techlash

The reputation of big tech faltered as scandals emerged over the past months with regularity

Unsure about tech's impact on me

BBC

CES 2019: 'I feel my sanity draining away'

theguardian

More than 70% of US fears robots taking over our lives, survey finds

Unsure about tech's impact on society

POLITICO

Forget 'techlash', the biggest problem for tech is a widening transatlantic rift

Washington Examiner

2020 prospect Mark Cuban warns killer AI is the 'ultimate threat to humanity'

Rising tech employee expectations

QUARTZ

Silicon Valley's backlash against Trump is being led by employees

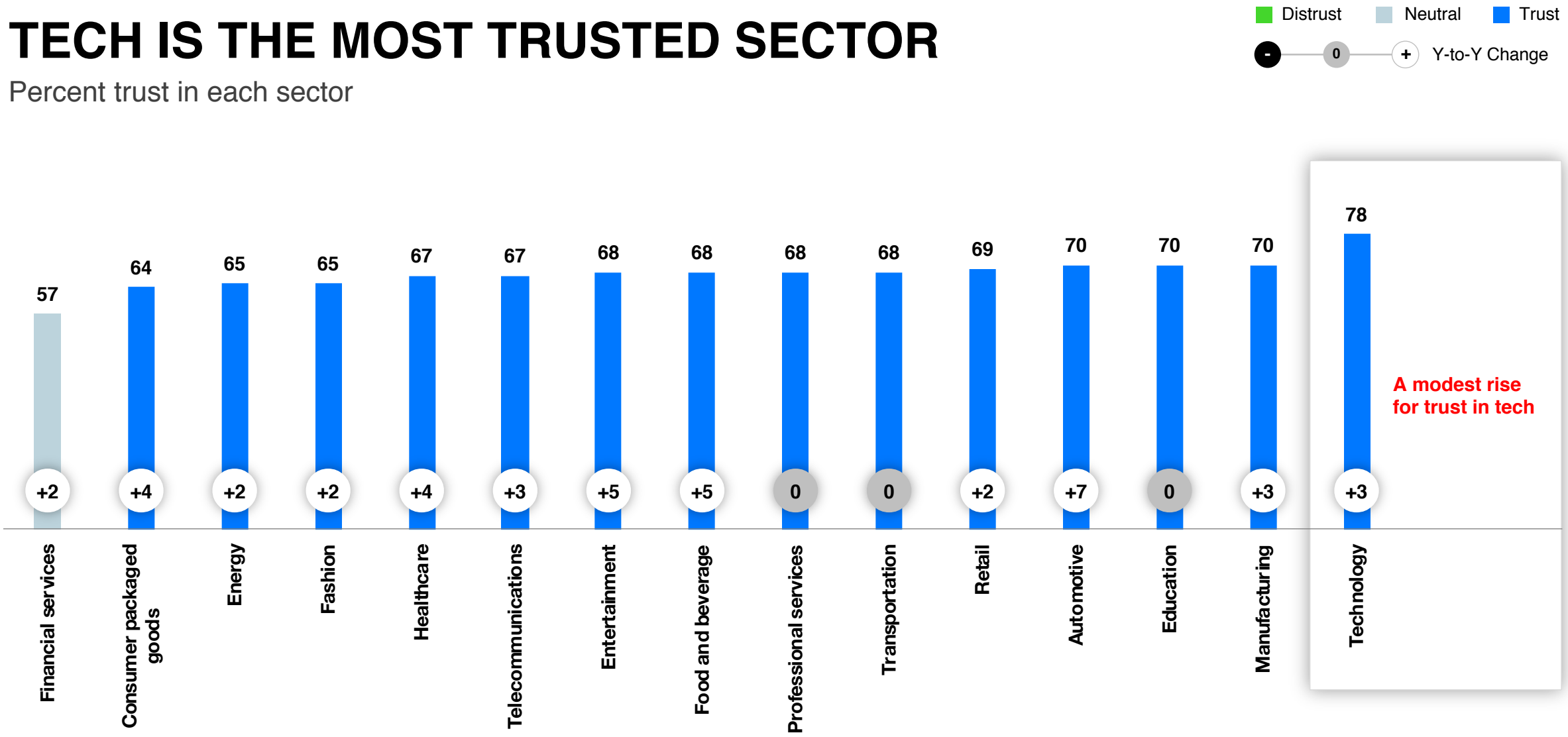
BuzzFeed News

Clashes Over Ethics At Major Tech Companies Are Causing Problems For Recruiters

Trust In Technology
Strong But Vulnerable

TECH IS THE MOST TRUSTED SECTOR

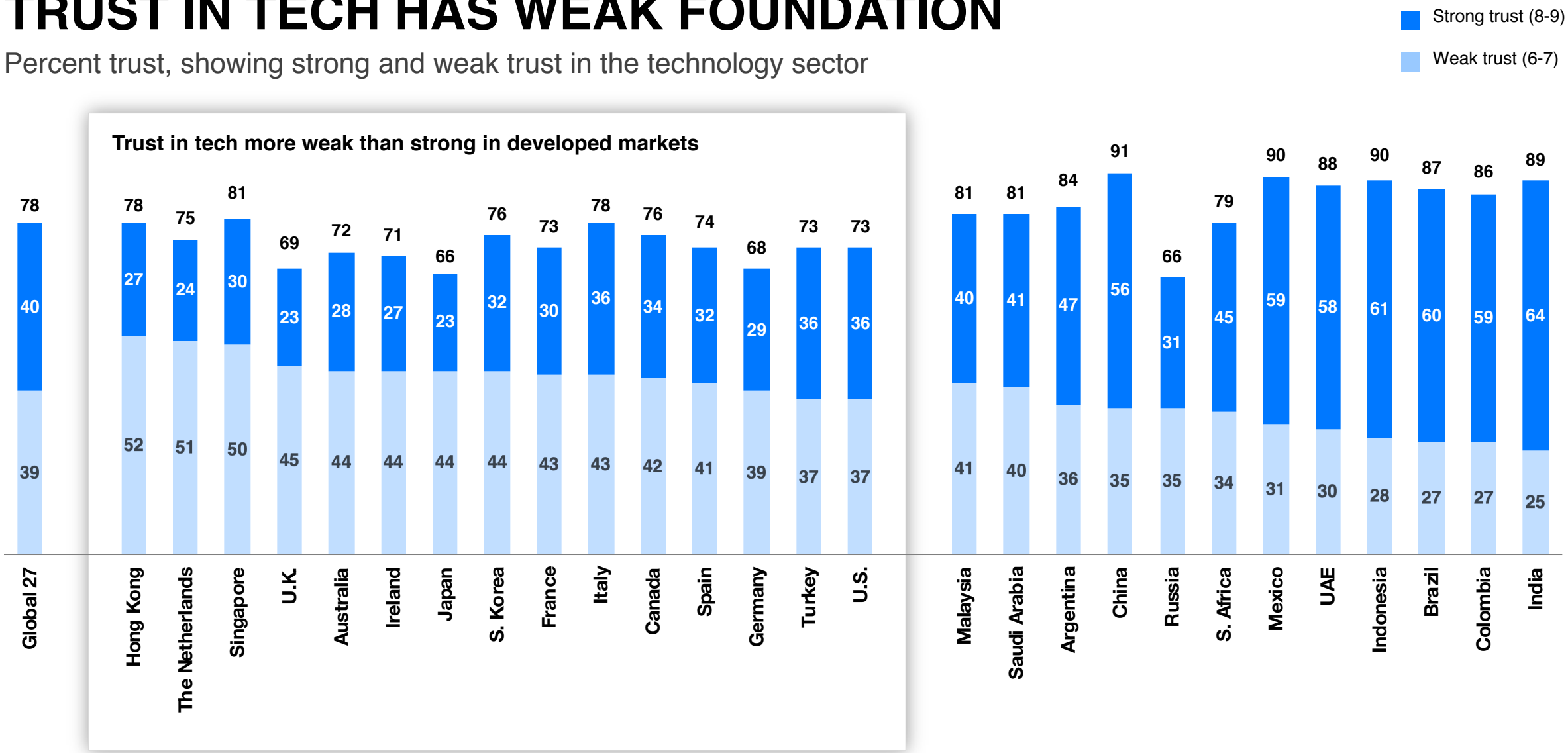
Percent trust in each sector



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

TRUST IN TECH HAS WEAK FOUNDATION

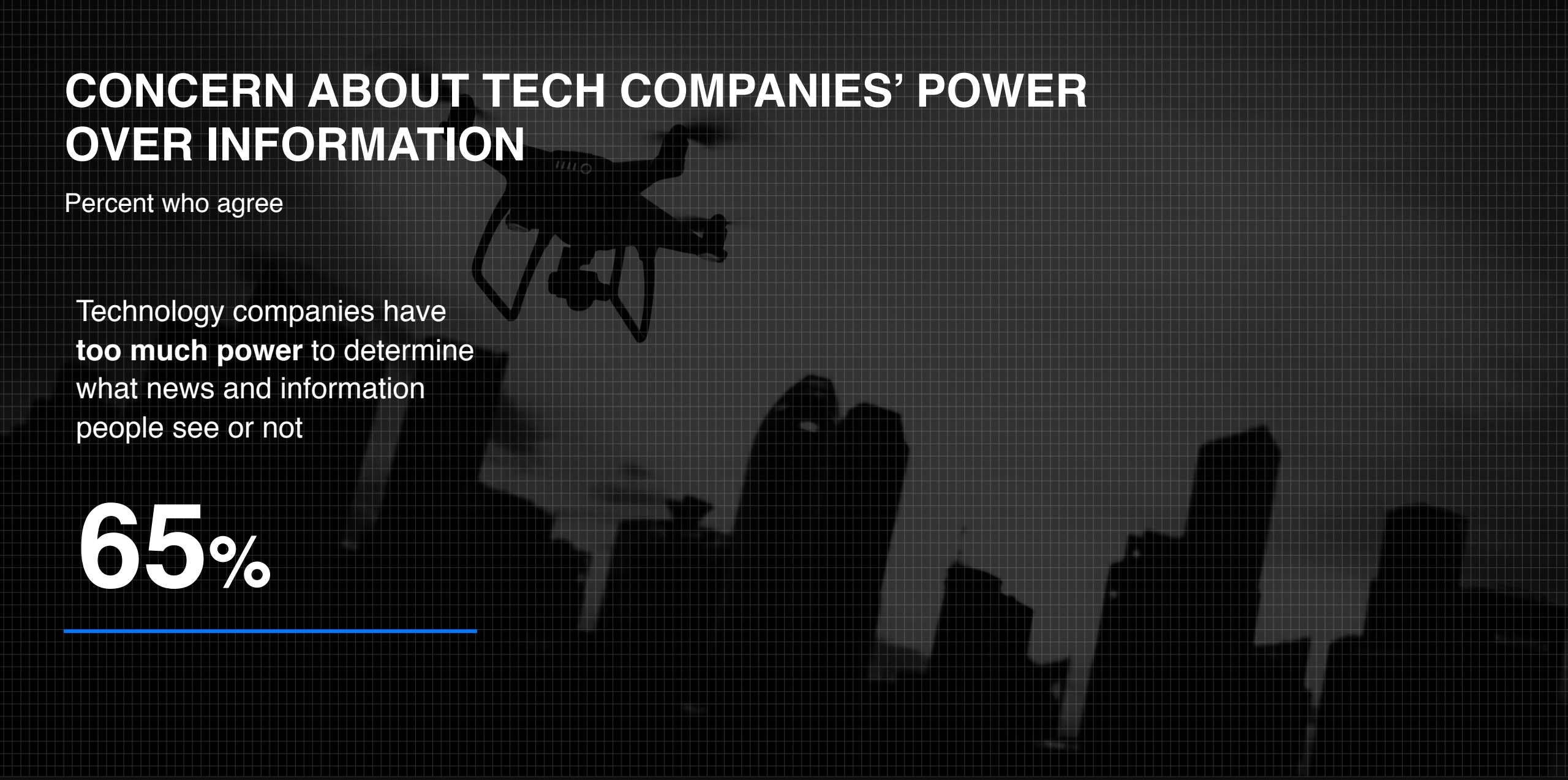
Percent trust, showing strong and weak trust in the technology sector



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 2 box, strong trust; codes 6-7, weak trust. Industries shown to half of the sample. General population, 27-market average.

CONCERN ABOUT TECH COMPANIES' POWER OVER INFORMATION

Percent who agree



Technology companies have **too much power** to determine what news and information people see or not

65%

2019 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement 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-market average.

CONCERN THAT TECH PUTS PROFIT BEFORE CUSTOMERS

Percent who agree the technology sector is performing well on…

Only

55%

Protecting customer data

Only

49%

Believe tech is putting the welfare of its customers ahead of profits

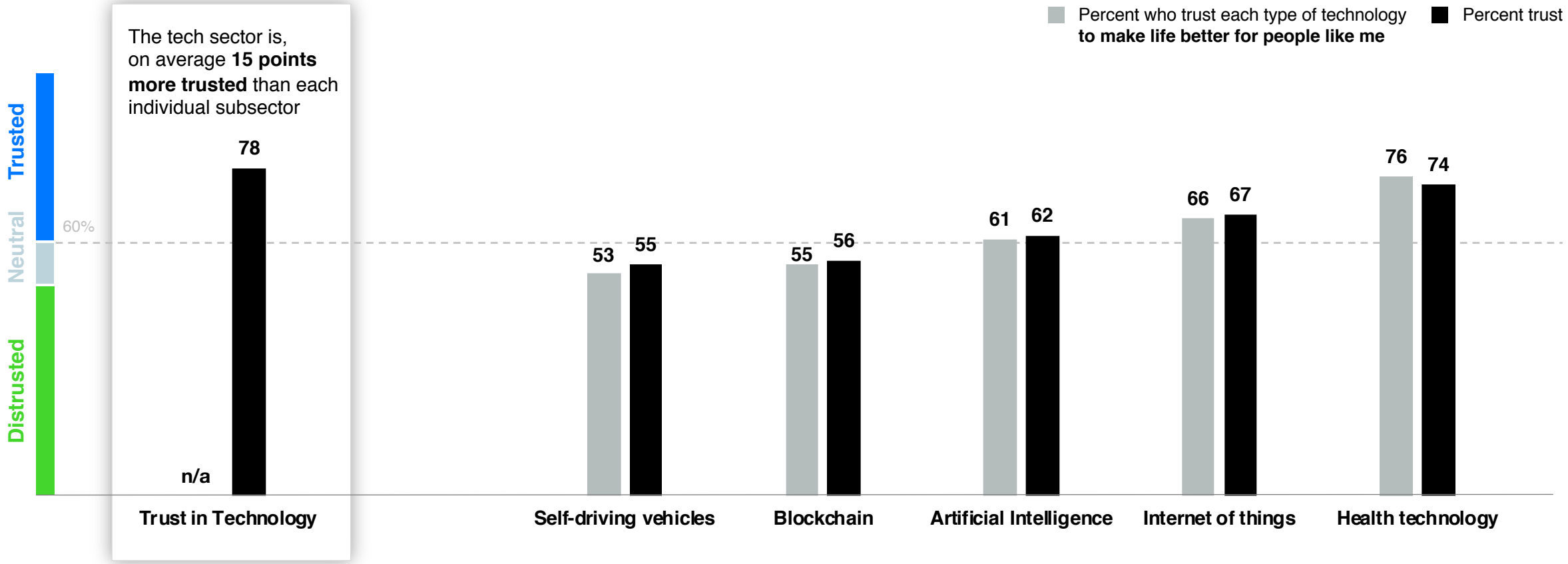
Stronger concern among developed markets with only 39% belief in sector performance

2019 Edelman Trust Barometer. DRV_TEC_GEN. How well do you think the technology industry is performing on the behaviors listed below? Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". 9-point scale; top 4 box, performing well. Question asked of one-fifth of the sample. General population, 27-market average.

My Fears About Tech

I TRUST TECH ONLY AS MUCH AS IT BENEFITS ME

Percent who trust technologies to make life better for people like them, and percent who trust each subsectors



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. DRV_TEC_BET. Please indicate how much you trust each of the following types of technology to make life better for people like you. Again, please use the same 9-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-market average.

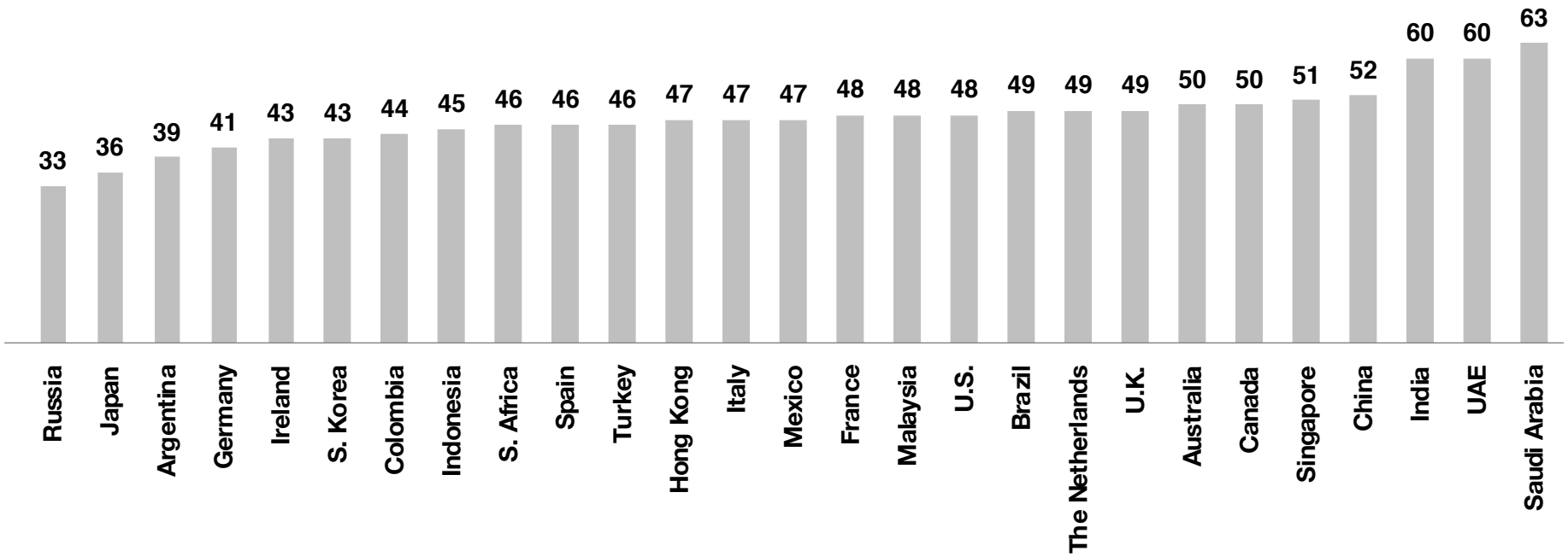
PACE OF DISRUPTION IS TOO FAST TO BENEFIT ME

Percent who believe

Globally,

47%

Technological innovations are **happening too quickly** and are leading to **changes that are not good for people like me**



2019 Edelman Trust Barometer. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. General population, 27-market average.

EMERGING TECH POSES A THREAT TO MY LIVELIHOOD

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

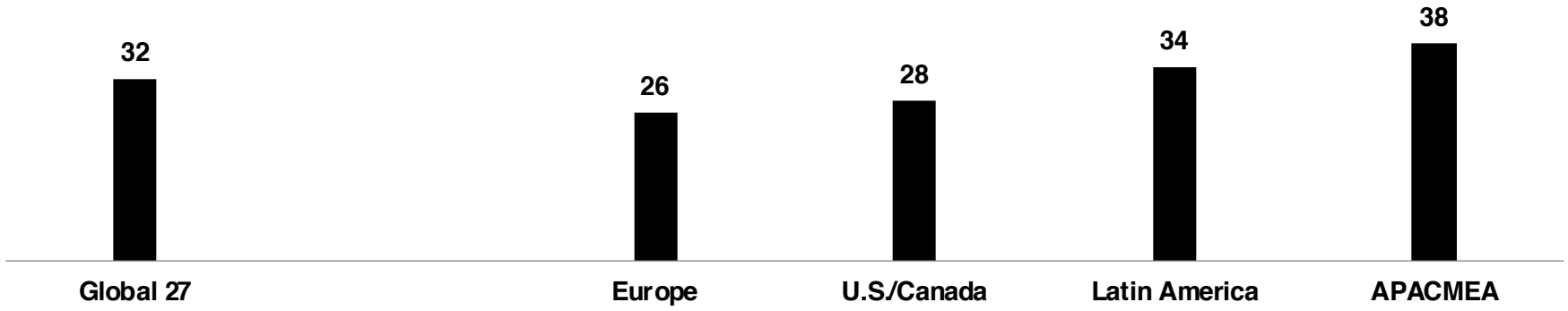
	Not having the **training** and skills necessary to get a good paying job	**Automation** and/or other innovations taking your job away
All employees	**59%**	**55%**

2019 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? Please indicate your answer using a nine-point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". 9-point scale; top 4 box, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average.

FEAR CAN BECOME MY REALITY

Percent who agree

I have **personally suffered loss or hardship** because of technological innovations

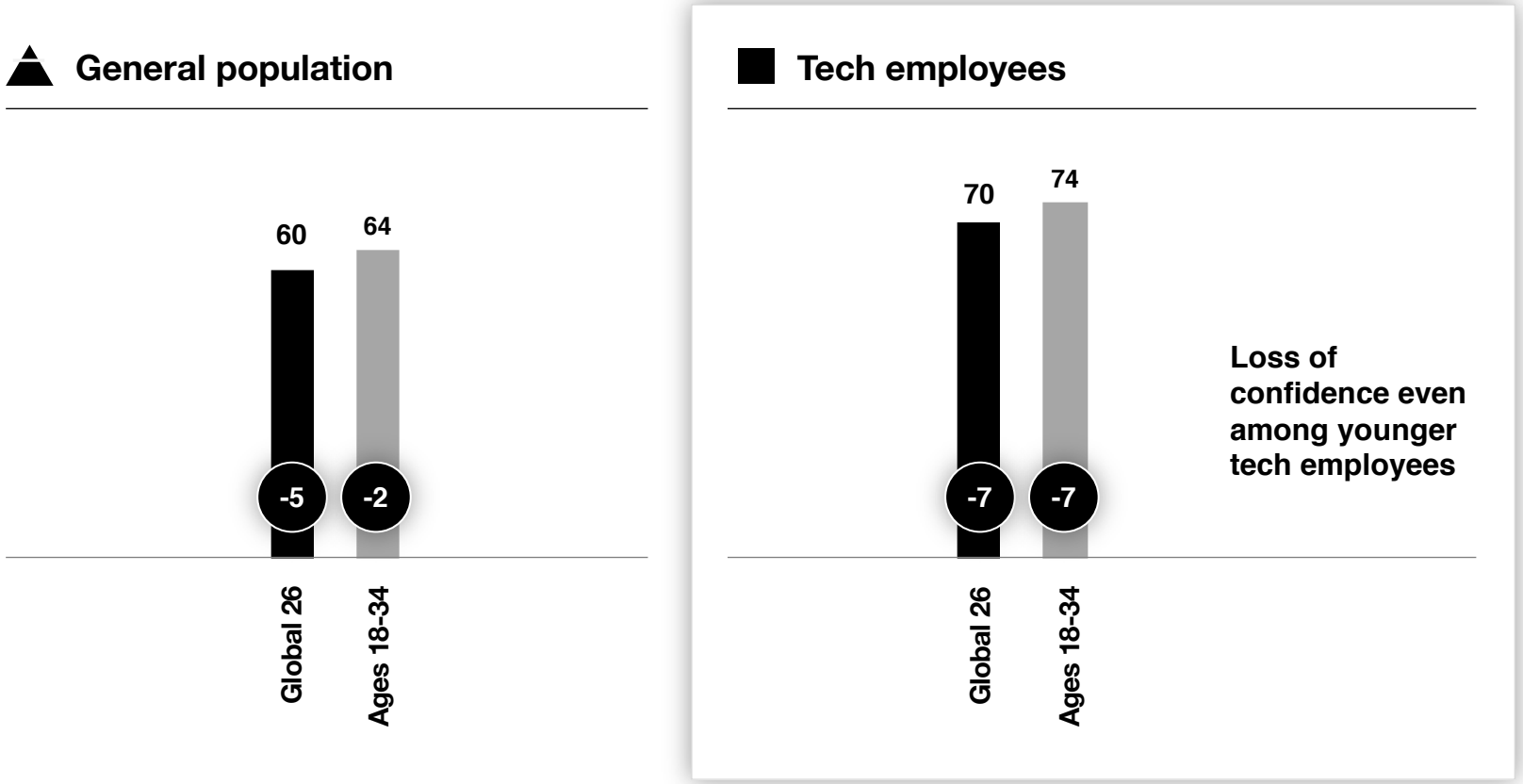


2019 Edelman Trust Barometer. POP_CAB. For each of the statements below, please indicate how much you agree or disagree. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-market average and by region.

ERODING BELIEF THAT TECHNOLOGY HAS A POSITVE IMPACT ON SOCIETY

Percent who agree the tech sector is conscious of societal impact and contributes to the greater good

- 0 + Y-to-Y Change



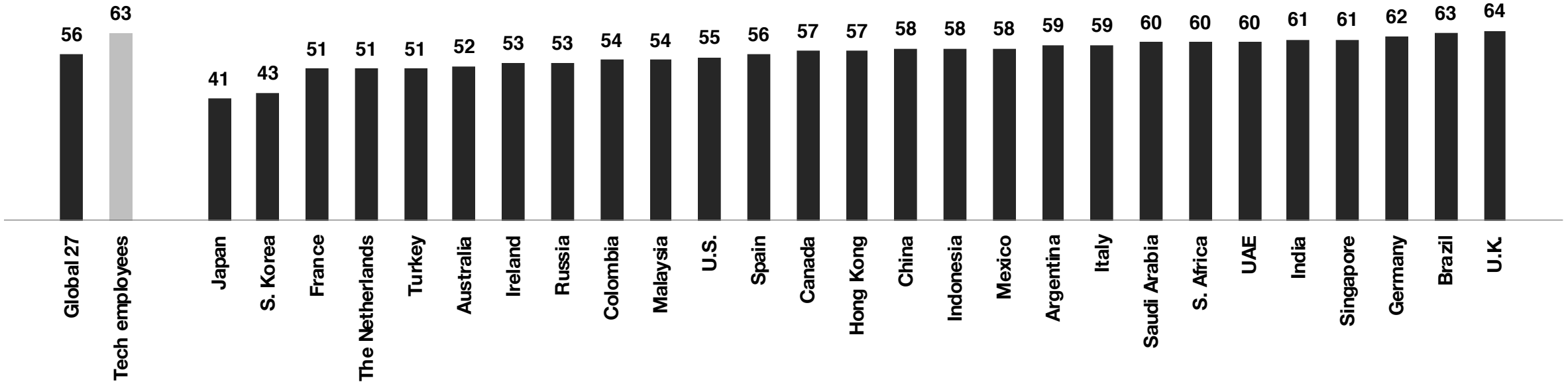
2019 Edelman Trust Barometer. DRV_TEC_GEN. How well do you think the technology industry is performing on the behaviors listed below? Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". 9-point scale; top 4 box, performing well. Question asked of one-fifth of the sample. General population and employees working in the technology sector (Q420/13 AND NOT Q421/8), 26-market average, and by 18-34 year olds.

A New Societal Contract for Tech

GUIDE PEOPLE THROUGH THE CHANGES THEY FEAR

Percent who agree

Tech companies are **not doing enough to prepare society** for the full impact of emerging new technologies



2019 Edelman Trust Barometer. DRV_TEC_AGR. For each of the statements below, please indicate how much you agree or disagree. 9-point scale; top 4 box, agree. Question asked of one-fifth of the sample. General population and employees working in the technology sector (Q420/13 AND Q43/1 AND NOT Q28/7), 27-market average.

MAKE TECH A FORCE FOR POSITIVE CHANGE

Percent who agree

Tech companies should **play a larger role to help ensure that our education system keeps pace** with emerging skills people will need in the future

Global
77%

Tech employees
81%

Tech companies are **proactively partnering with government to shape policies that ensure technology benefits** everyone and not only the upper classes

Global
56%

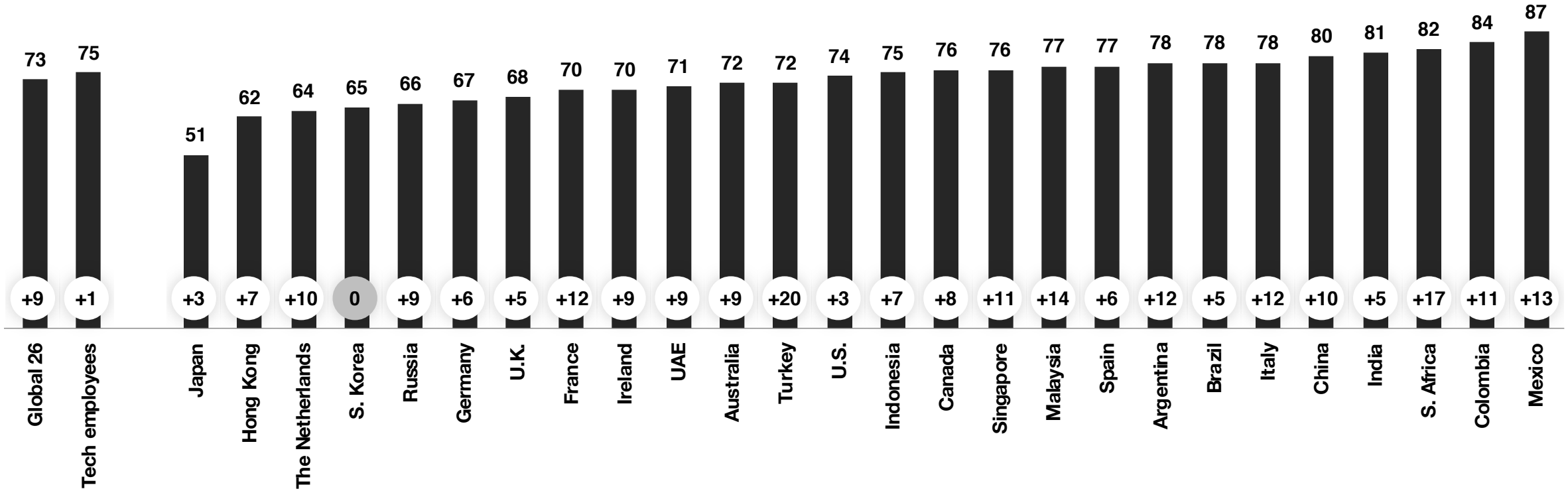
Tech employees
65%

2019 Edelman Trust Barometer. DRV_TEC_AGR. For each of the statements below, please indicate how much you agree or disagree. 9-point scale; top 4 box, agree. Question asked of one-fifth of the sample. DRV_TEC_GEN. How well do you think the technology industry is performing on the behaviors listed below? Use a 9-point scale where one means they are "performing extremely poorly" and nine means they are "performing extremely well". 9-point scale; top 4 box, performing well. Question asked of one-fifth of the sample. General population and employees working in the technology sector (Q420/13 AND Q43/1 AND NOT Q28/7), 27-market average.

PROFITABILITY IS NO EXCUSE

Percent who agree

A company can take specific actions that both **increase profits and improve the economic and social conditions** in the communities where it operates



2019 Edelman Trust Barometer. 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 the sample. General population and employees working in the technology sector (Q420/13 AND NOT Q421/8), 26-market average.

Lead Change from the Inside-Out

TECH EMPLOYEES EXPECT EMPLOYERS TO BE PART OF THE SOLUTION

Percent of Tech employees who expect each from a prospective employer

Shared Action

Solve Issues

71%

There are opportunities within my job to engage in activities that help **address social problems or support the local community**

Reflect My Values

77%

My **values are reflected** in the way the organization goes about its business

Lead from the Front

74%

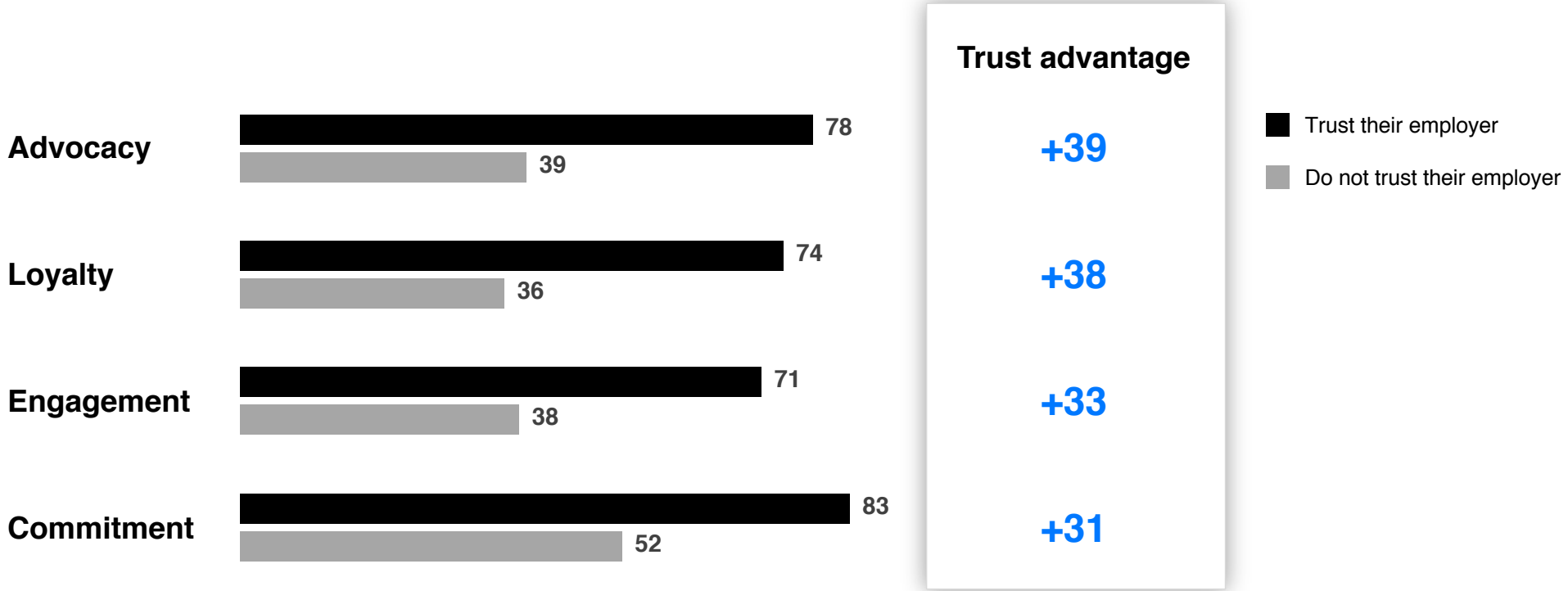
of Tech employees agree **It's critically important for my CEO to respond to challenging times**

- Industry issues
- Political events
- National crisis
- Employee-driven issues

2019 Edelman Trust Barometer. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). CEO_DIR. On which of the following occasions do you believe it is critically important to hear directly from the CEO or head of the organization you work for? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). Technology employees (Q420/13 AND Q43/1 AND NOT Q28/7), 27-market average. Data shown is a net of "when there is major news or an event that affects our industry or sector," "when there is a major social or political event that affects our country," "when there is a crisis in the country," and "when employees demand that the CEO publicly take a stand on an important issue".

EMPLOYEE TRUST IS CRITICAL

Percent of employees who engage in these types of behaviors on behalf of their employer



2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99). TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average. Advocacy is an average of (EMP_ENG/3-5); Loyalty is an average of (EMP_ENG/1-2); Engagement is an average of (EMP_ENG/10-15); Commitment is an average of (EMP_ENG/6-9). See the tech appendix for a complete list of the items that went into each employee KPI dimension.

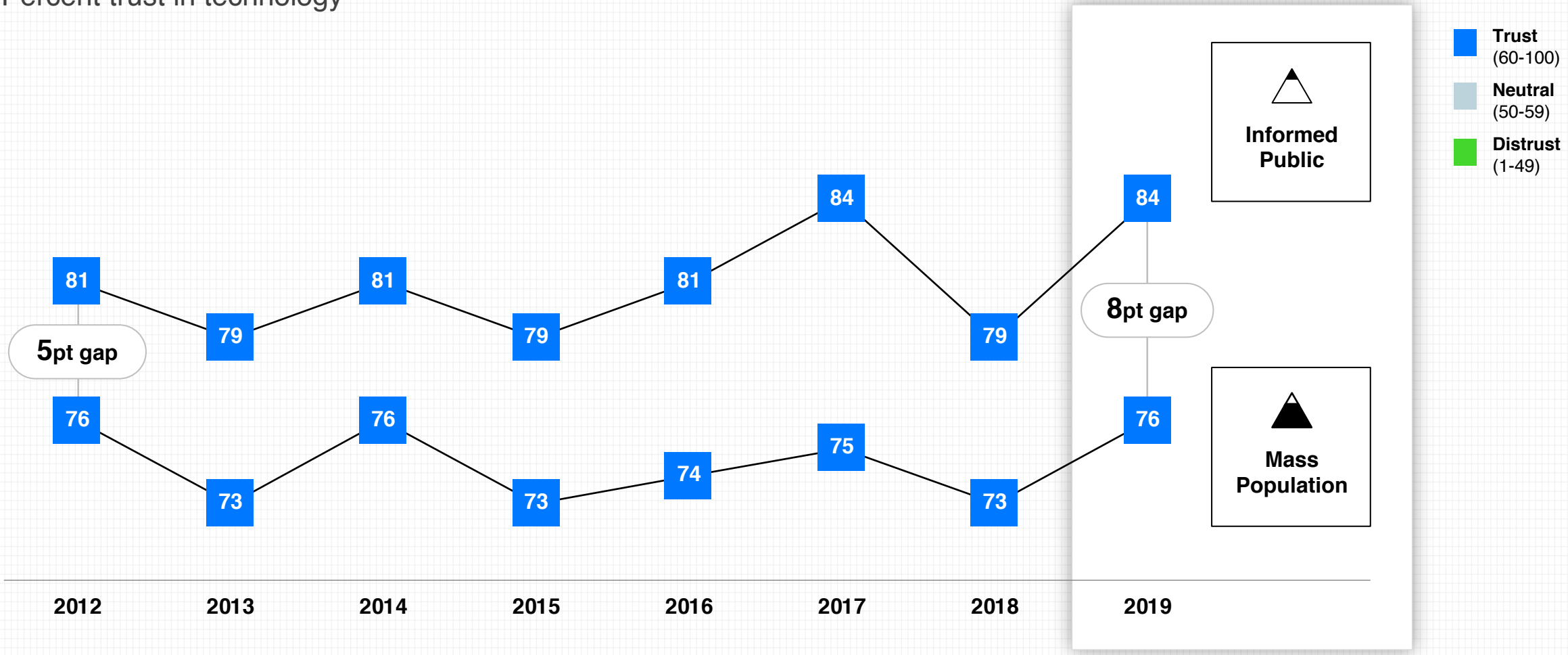
STAY AHEAD OF TECHLASH

1. Address the personal benefits *and* risks of innovation
2. Assume responsibility to guide society through disruption
3. Form partnerships to ensure tech benefits everyone
4. Activate employees as ambassadors
5. CEOs to lead from the front and commit to positive change

Appendix

TRUST IN TECHNOLOGY OVER TIME

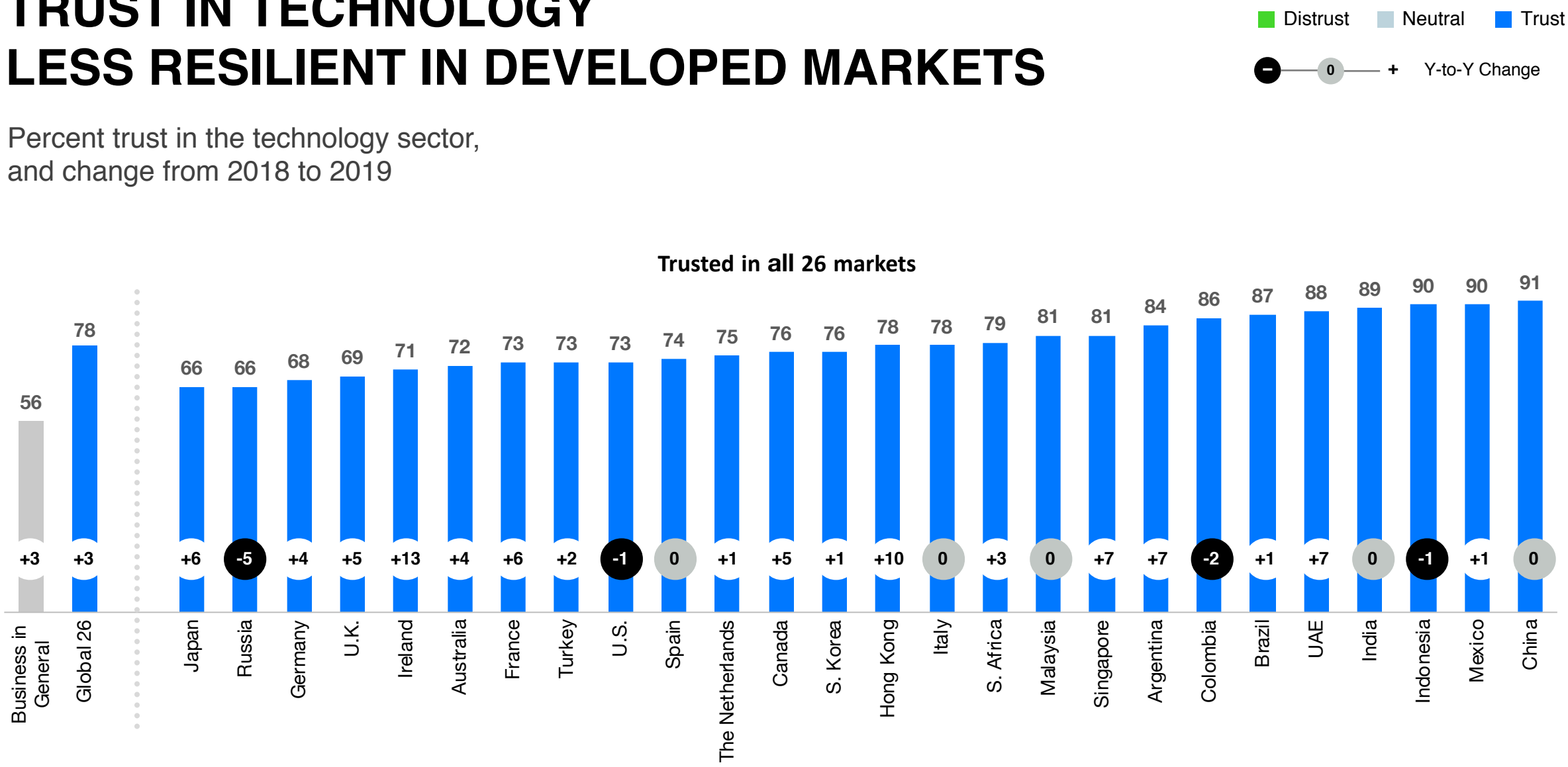
Percent trust in technology



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. Informed public and mass population, 23-market average.

TRUST IN TECHNOLOGY LESS RESILIENT IN DEVELOPED MARKETS

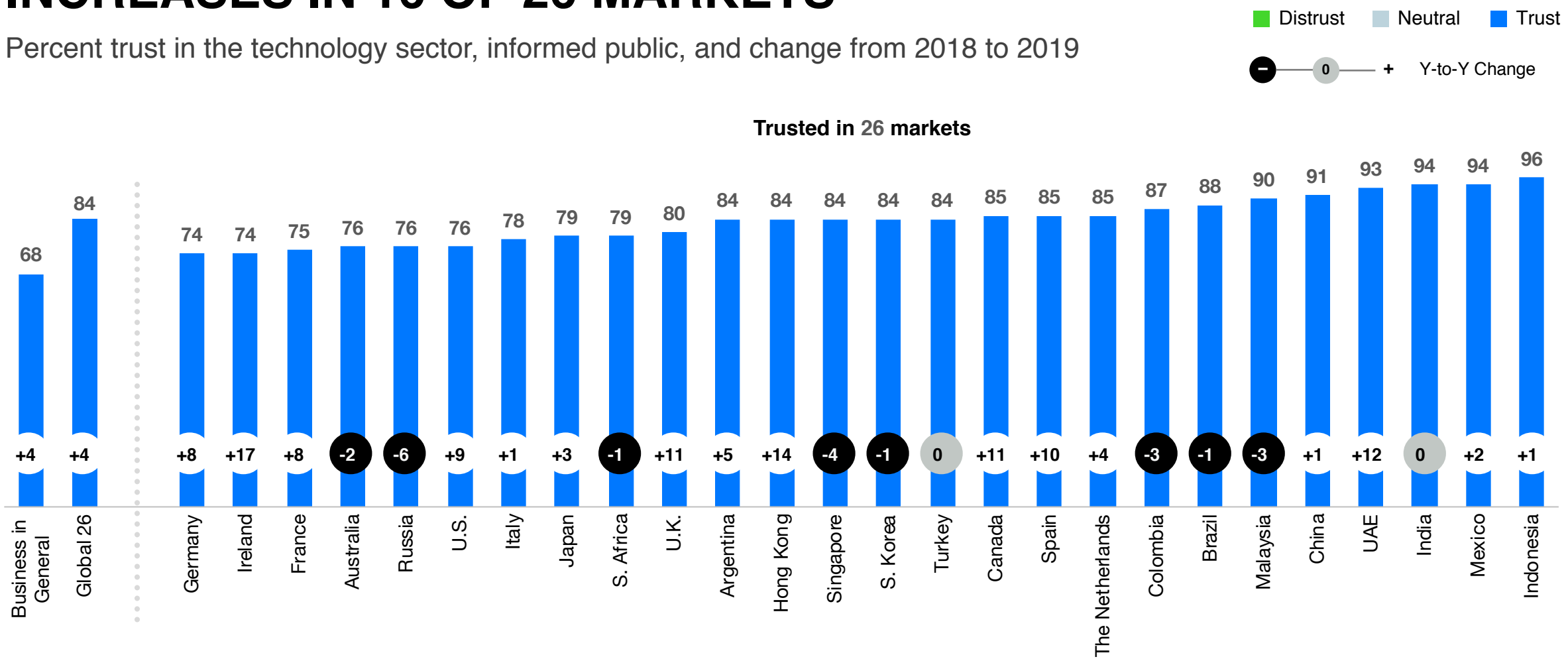
Percent trust in the technology sector, and change from 2018 to 2019



2019 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 using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

INFORMED PUBLIC TRUST IN TECHNOLOGY INCREASES IN 16 OF 26 MARKETS

Percent trust in the technology sector, informed public, and change from 2018 to 2019



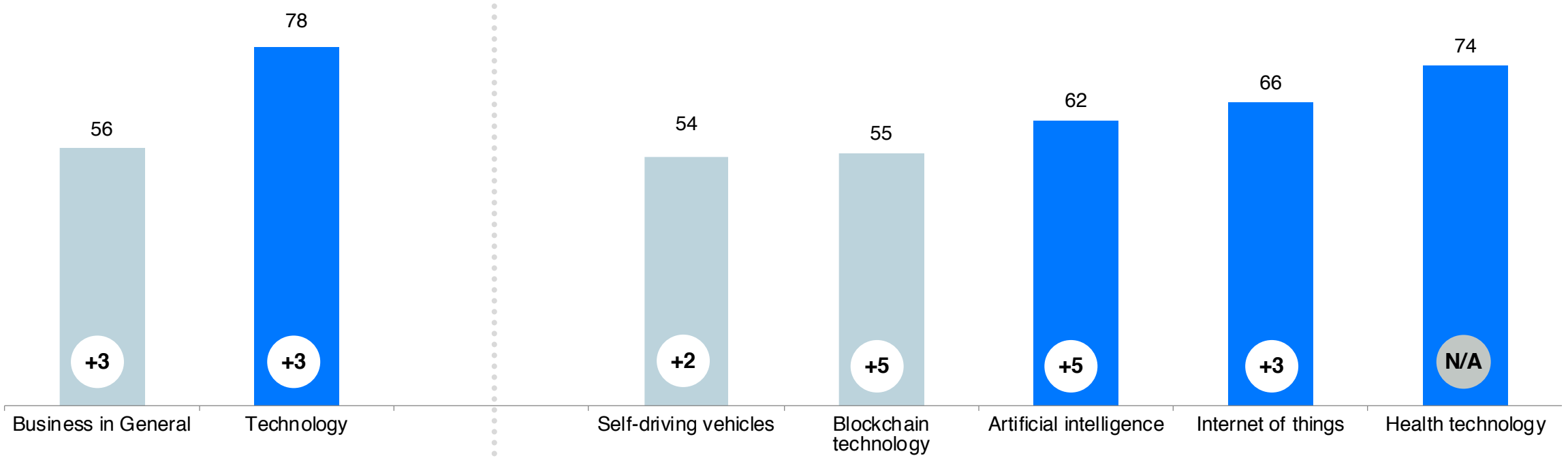
2019 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. Informed public, 26-market average.

TECH SUBSECTORS EARNING TRUST OVER TIME

Distrust Neutral Trust

− 0 + Y-to-Y Change

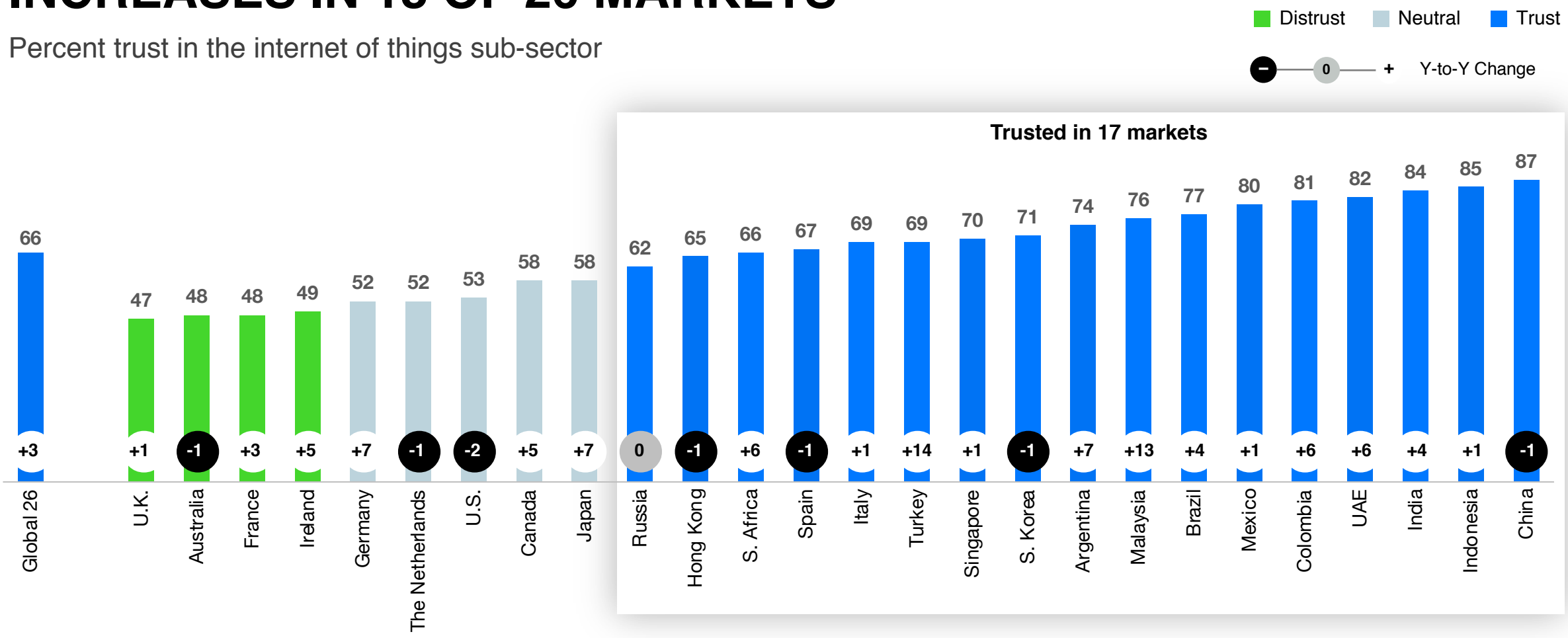
Percent trust in business, technology sector and technology sub-sectors, and change from 2018 to 2019



2019 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 using a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN INTERNET OF THINGS INCREASES IN 18 OF 26 MARKETS

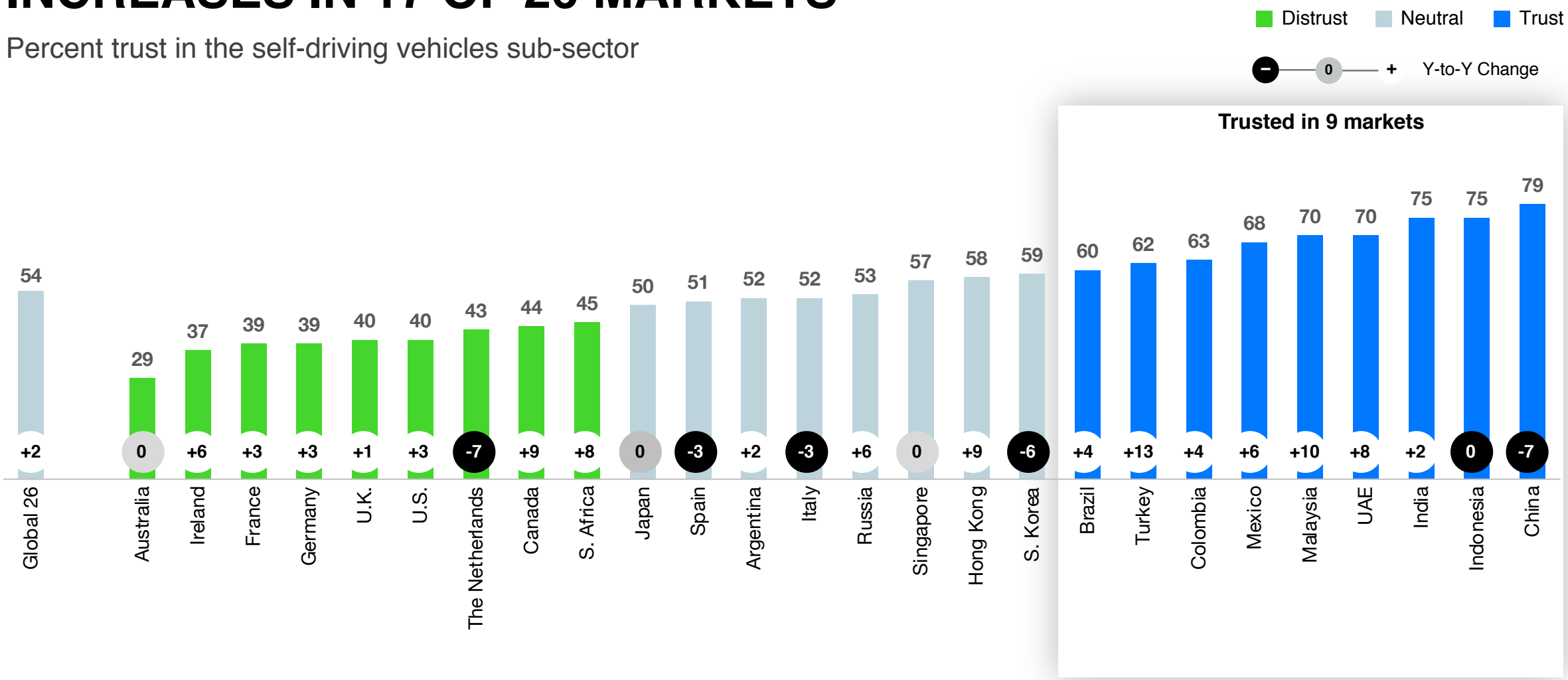
Percent trust in the internet of things sub-sector



2019 Edelman Trust Barometer. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN AUTONOMOUS/SELF-DRIVING VEHICLES INCREASES IN 17 OF 26 MARKETS

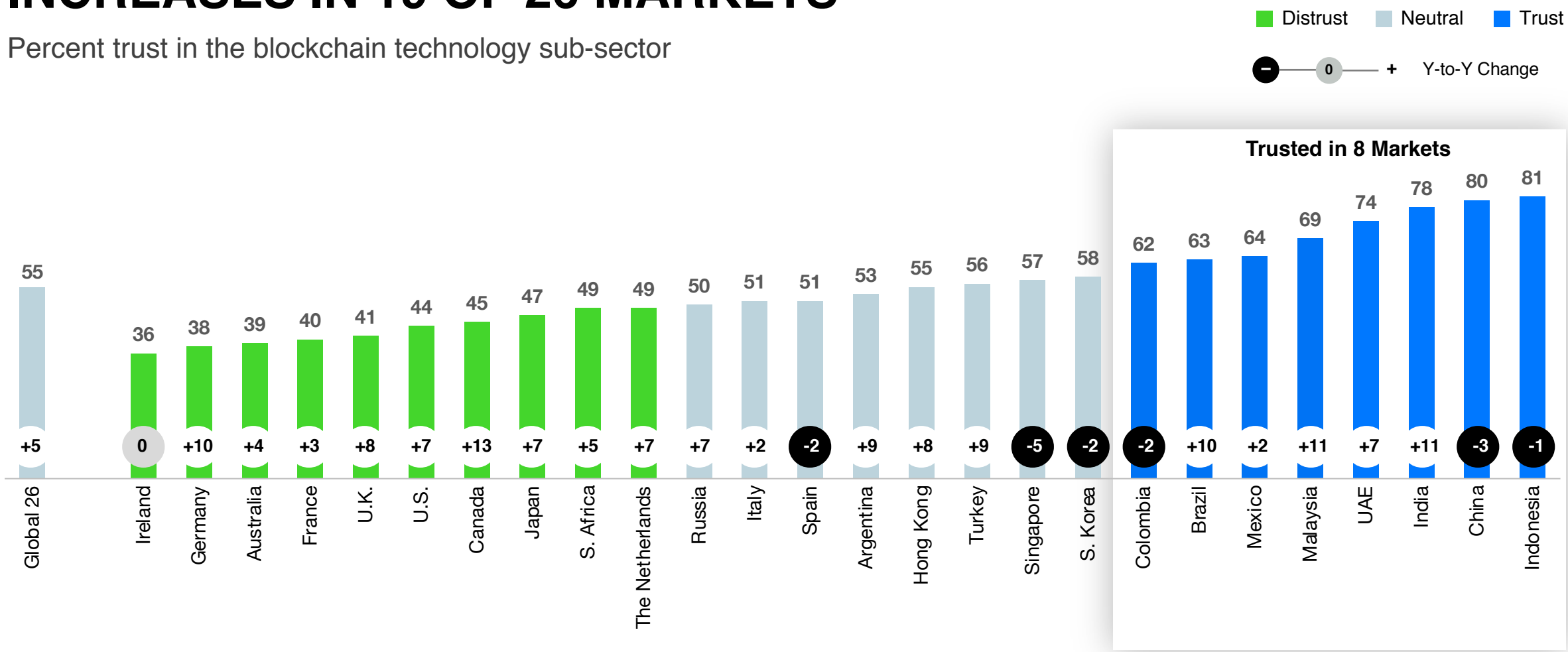
Percent trust in the self-driving vehicles sub-sector



2019 Edelman Trust Barometer. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN BLOCKCHAIN TECHNOLOGY INCREASES IN 19 OF 26 MARKETS

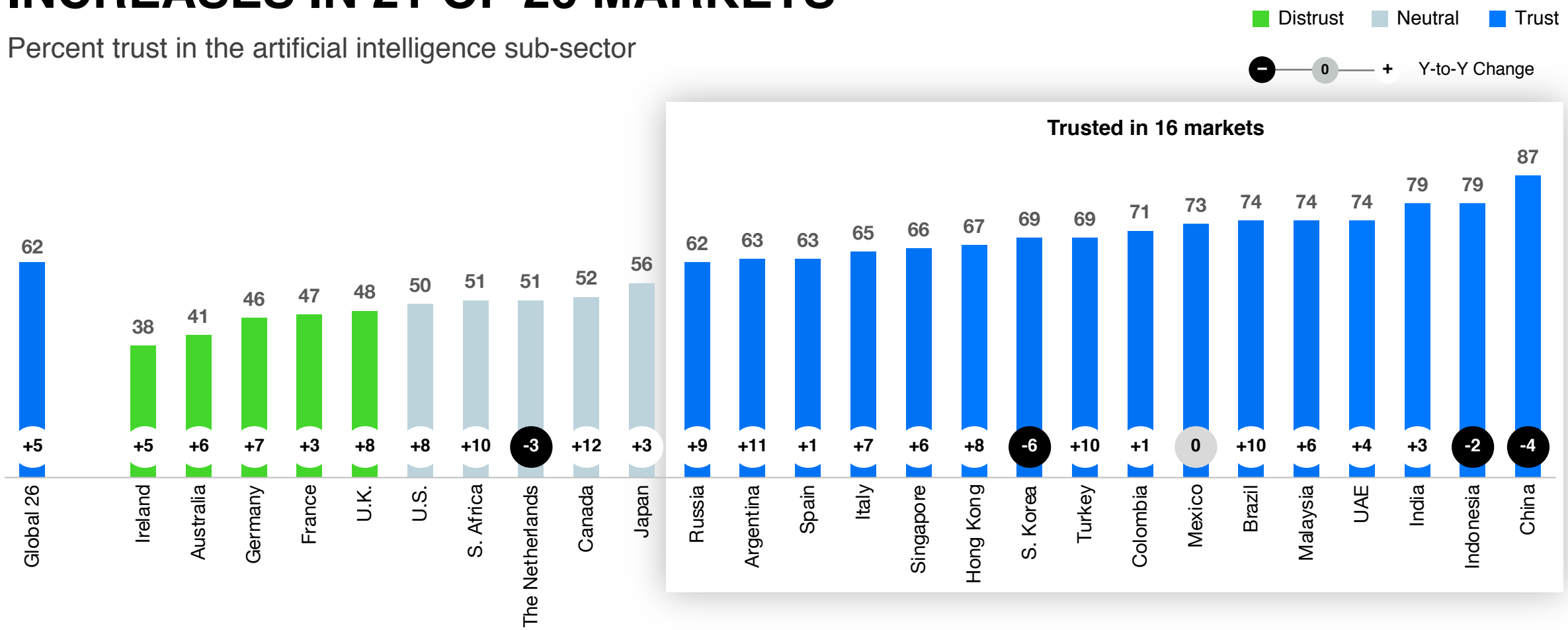
Percent trust in the blockchain technology sub-sector



2019 Edelman Trust Barometer. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN ARTIFICIAL INTELLIGENCE INCREASES IN 21 OF 26 MARKETS

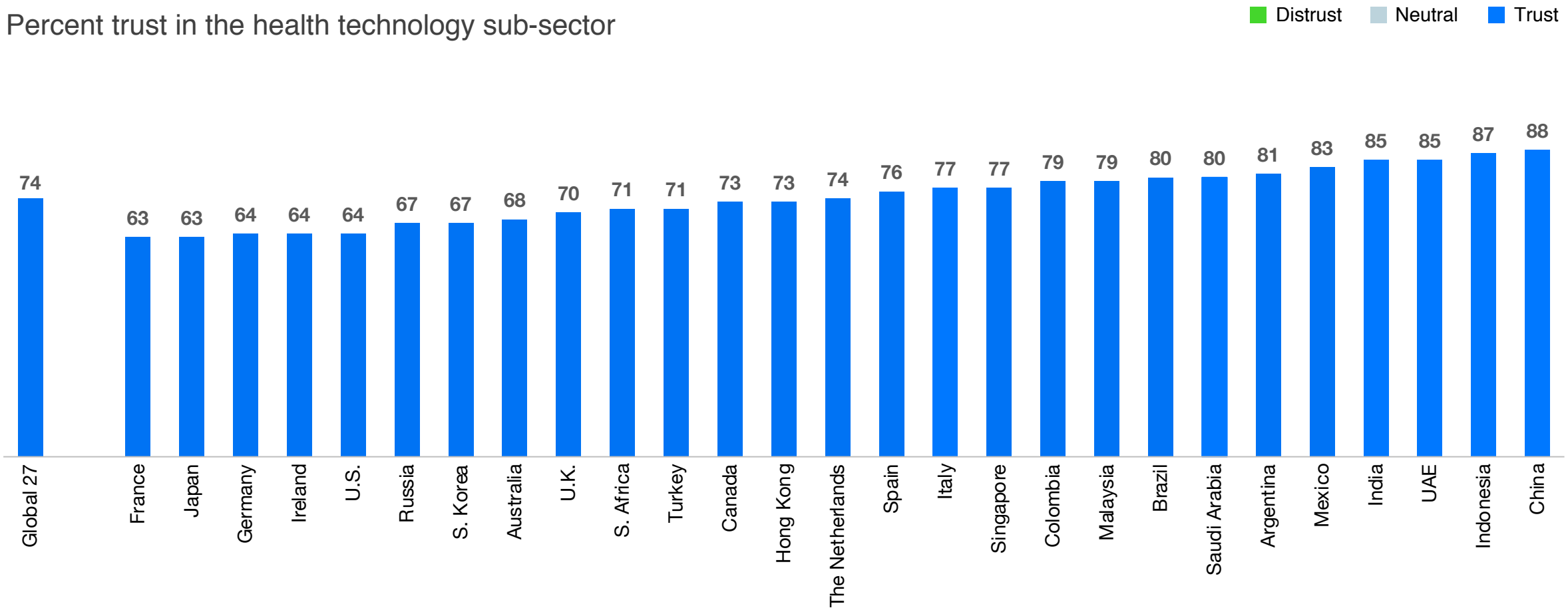
Percent trust in the artificial intelligence sub-sector



2019 Edelman Trust Barometer. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN HEALTH TECHNOLOGY TRUSTED IN ALL MARKETS

Percent trust in the health technology sub-sector



2019 Edelman Trust Barometer. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-market average.

TECH EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

Percent of employees who expect each from a prospective employer

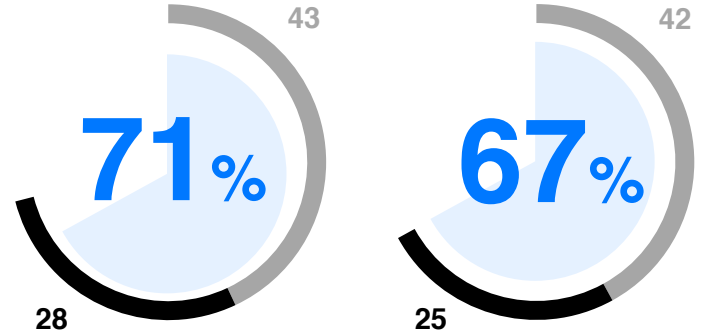
Strong expectation
You would have to **pay me a lot more** to work for an organization that does not offer this

Deal breaker
I would **never** work for an organization that does not offer this

Tech employees | All employees

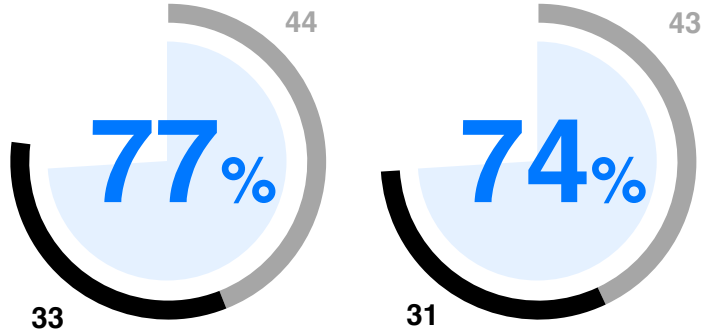
Shared Action

My employer has a greater purpose, and my job has a meaningful societal impact



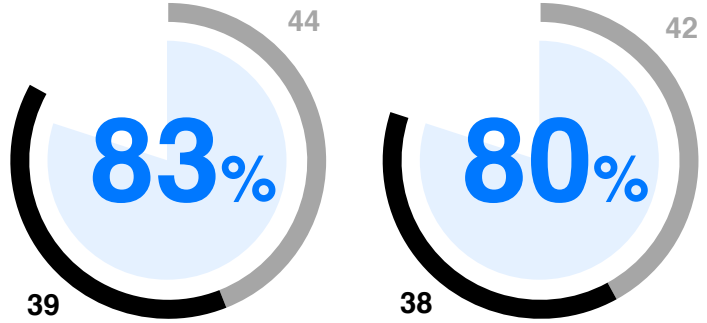
Personal Empowerment

I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



Job Opportunity

My employer offers wage growth, training, career growth and work which I find interesting & fulfilling



2019 Edelman Trust Barometer. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and employees working in the technology sector (Q420/13 AND Q43/1 AND NOT Q28/7), 27-market average. Buckets are the sum of the average of codes 1 & 2 for the items that make up each dimension. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.