



2019 EDELMAN TRUST BAROMETER

Women and Trust



19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

Sample weighted to reflect natural gender distribution in each market.

Global average: 50% Women, 50% Men

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)

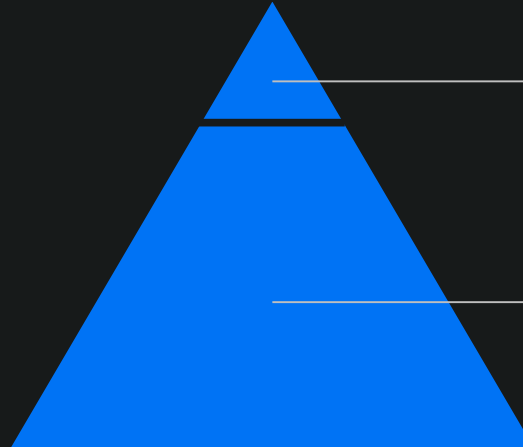
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

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 the 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

TRUST IN RETROSPECT

2001

Rising Influence of NGOs

2002

Fall of the Celebrity CEO

2003

Earned Media More Credible Than Advertising

2004

U.S. Companies in Europe Suffer Trust Discount

2005

Trust Shifts from "Authorities" to Peers

2006

A "Person Like Me" Emerges as Credible Spokesperson

2007

Business More Trusted Than Government and Media

2008

Young Influencers Have More Trust in Business

2009

Business Must Partner with Government to Regain Trust

2010

Trust is Now an Essential Line of Business

2011

Rise of Authority Figures

2012

Fall of Government

2013

Crisis of Leadership

2014

Business to Lead the Debate for Change

2015

Trust is Essential to Innovation

2016

Growing Inequality of Trust

2017

Trust in Crisis

2018

The Battle for Truth

2019

Trust at Work

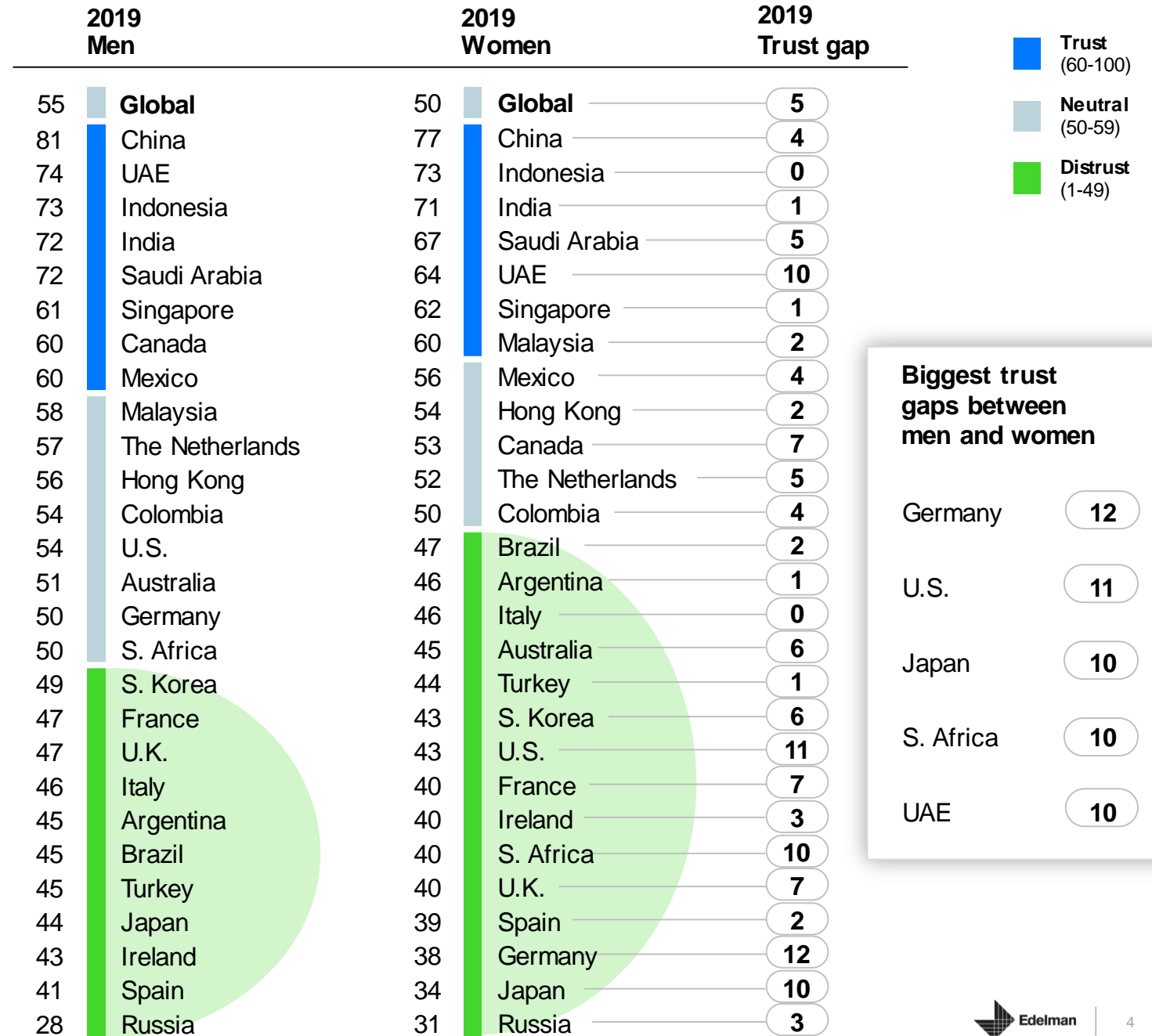
WOMEN TRUST LESS THAN MEN

Trust Index

Global Trust Index neutral for men and women

Women distrust their institutions in 15 of 27 markets, four more than men

2019 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 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. General population, 27-market average, by gender.



WOMEN ARE DRIVING CHANGE GLOBALLY



#MeToo and #TimesUp – women speak up globally



India's "Women's Wall" demonstrate for equality



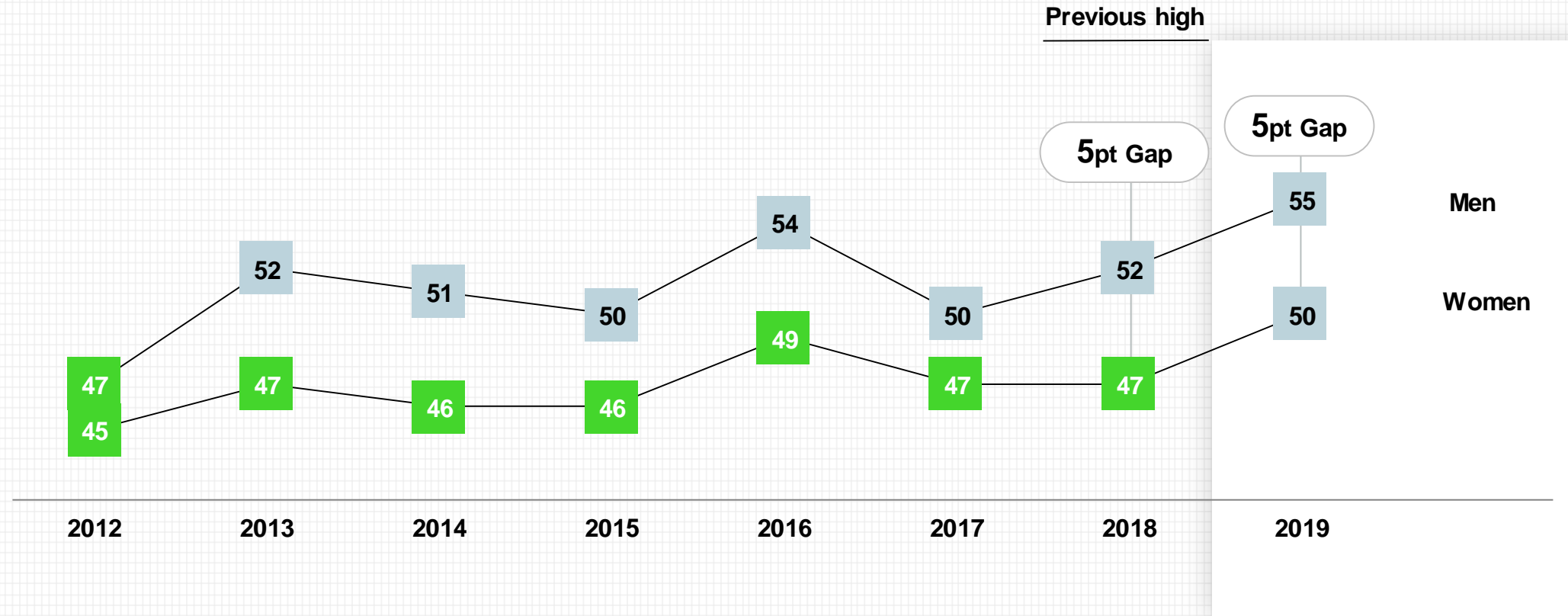
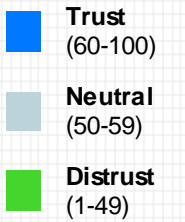
"Womenomics" for Japan's shrinking workforce



Alexandria Ocasio-Cortez of the 116th U.S. Congress

CONTINUED TRUST GAP BETWEEN MEN AND WOMEN

Trust Index (23-market average)

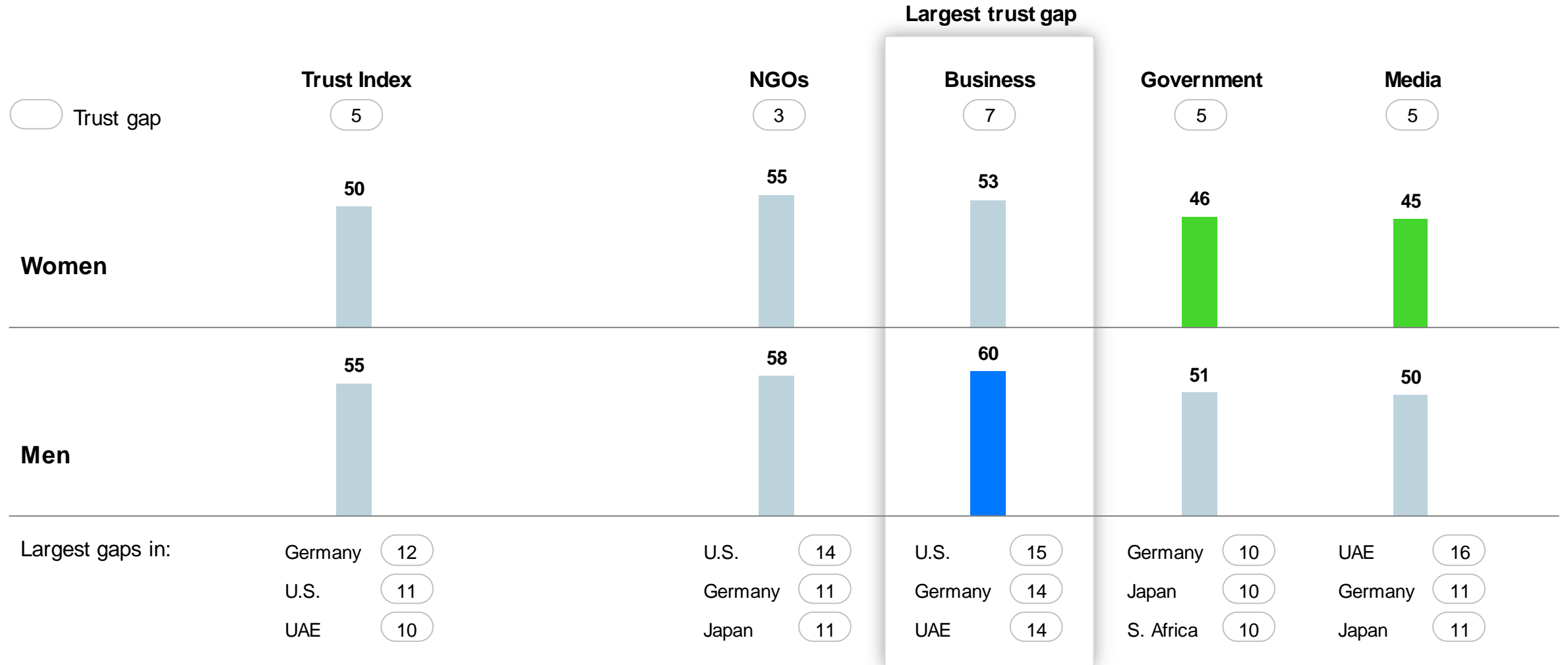


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GENDER DIVIDE GREATEST FOR TRUST IN BUSINESS

Percent trust in the four institutions

■ Distrust ■ Neutral ■ Trust

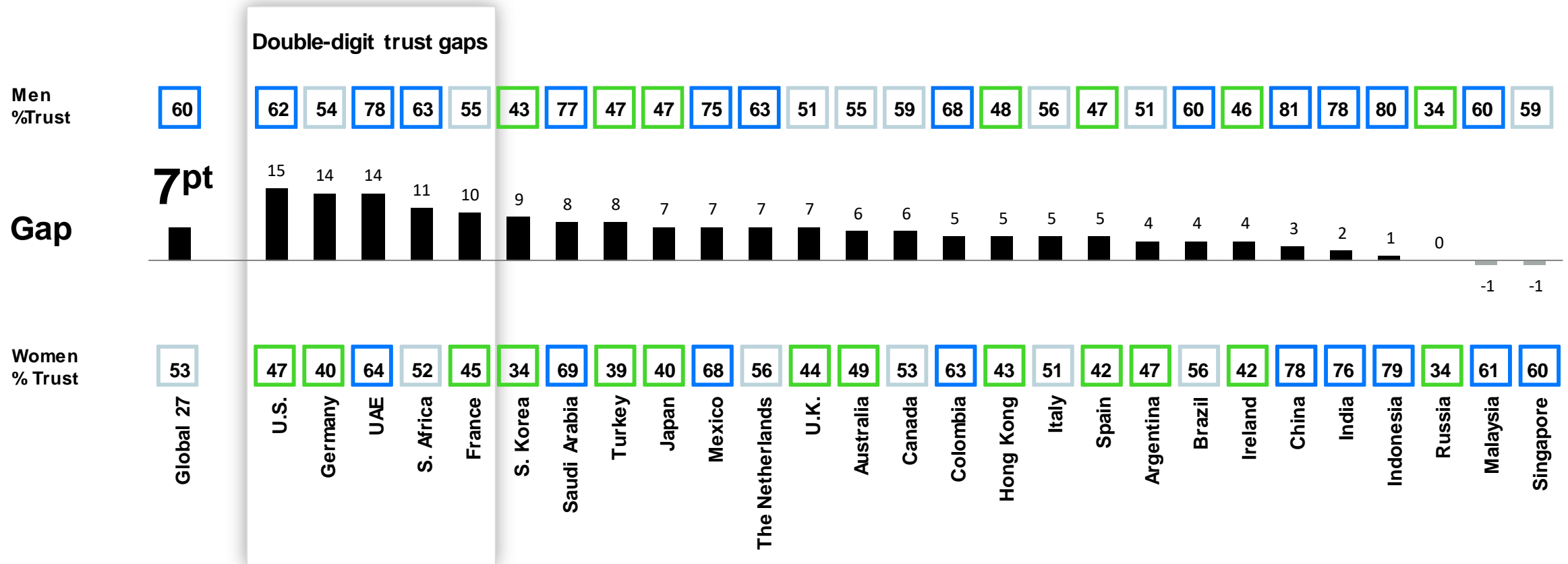


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DOUBLE-DIGIT GENDER GAPS IN BUSINESS TRUST IN KEY MARKETS

■ Distrust
 ■ Neutral
 ■ Trust

Trust gap, comparing the difference between men's and women's trust in business



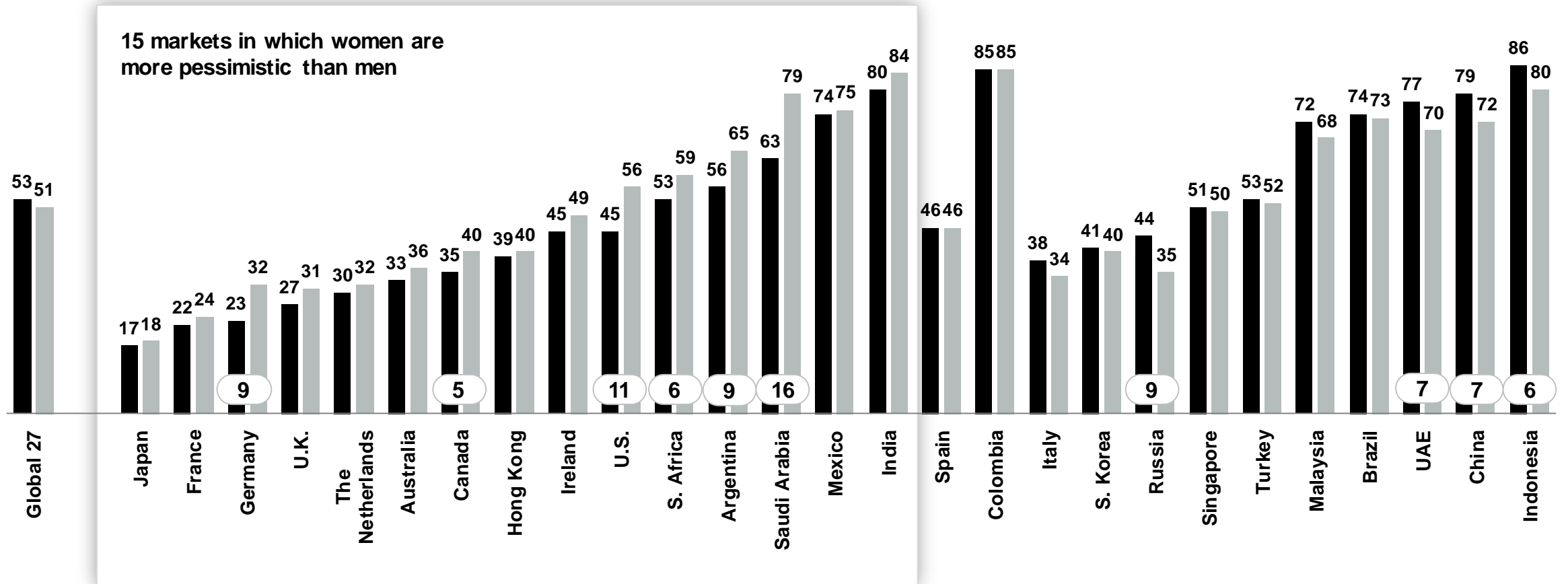
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WOMEN MORE PESSIMISTIC ABOUT THE FUTURE IN MOST DEVELOPED MARKETS

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

Women
 Men

 Trust gap of 5 or greater



SHARED FEARS ABOUT JOB SECURITY

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

■ Women ■ Men

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% 60%

54% 55%

54% 59%

Employees who work for multinational companies

64% 63%

61% 60%

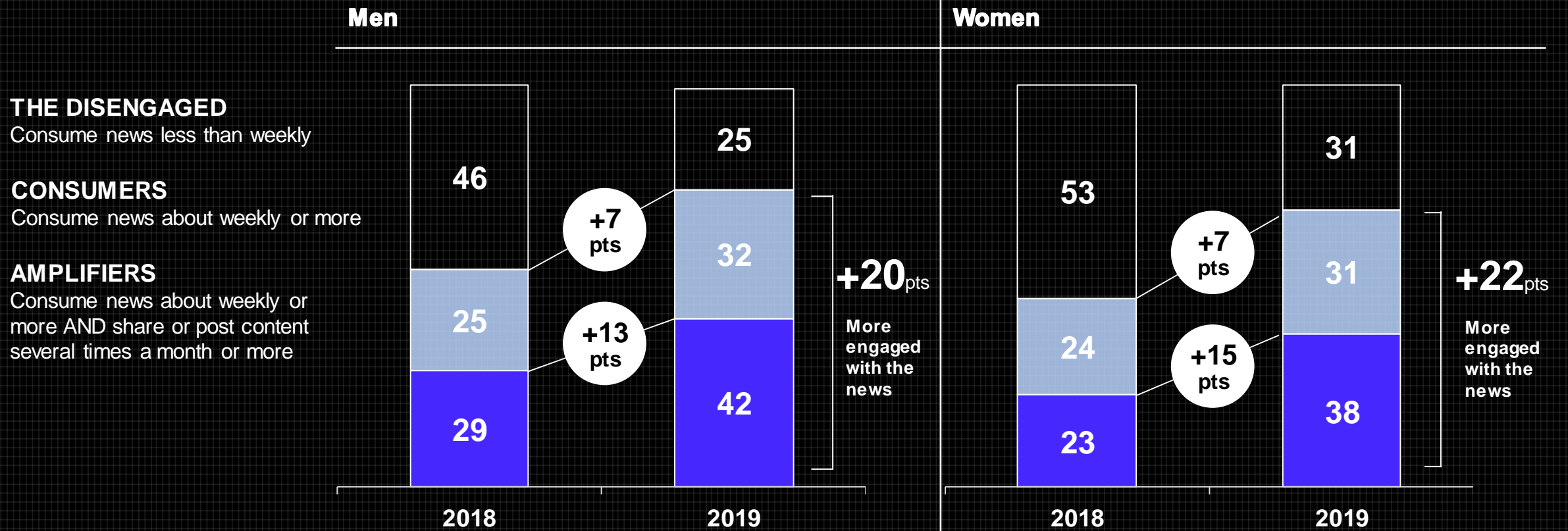
61% 66%

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 and multinational employees, 27-market average, by gender.

THEY'RE LOOKING FOR ANSWERS

How often do you engage in the following activities related to news and information?

-
0
+ Y-to-Y Change



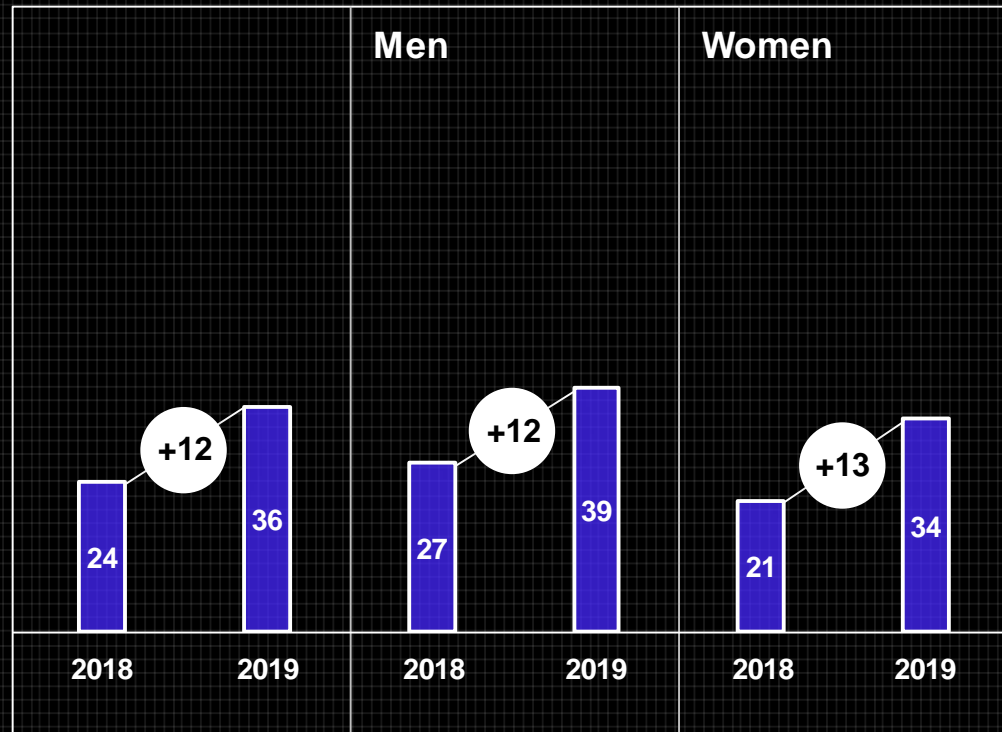
2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. General population, 26-market average, by gender. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

MORE WOMEN BECOME AMPLIFIERS

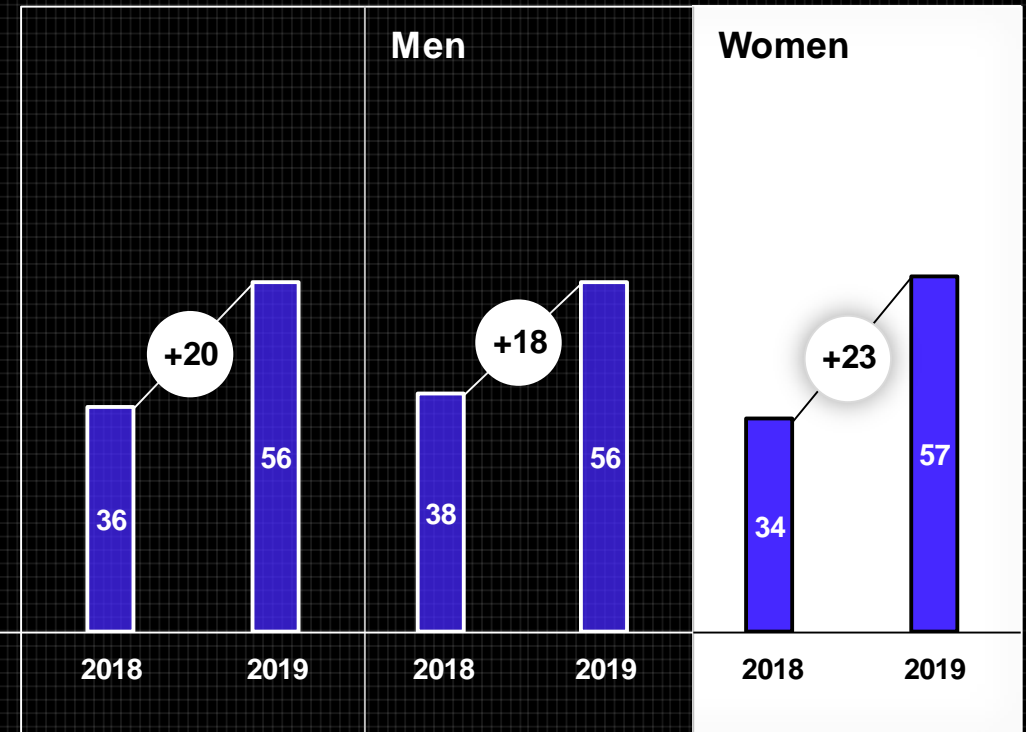
Percent of amplifiers in each segment

- 0 + Y-to-Y Change

▲ Mass population



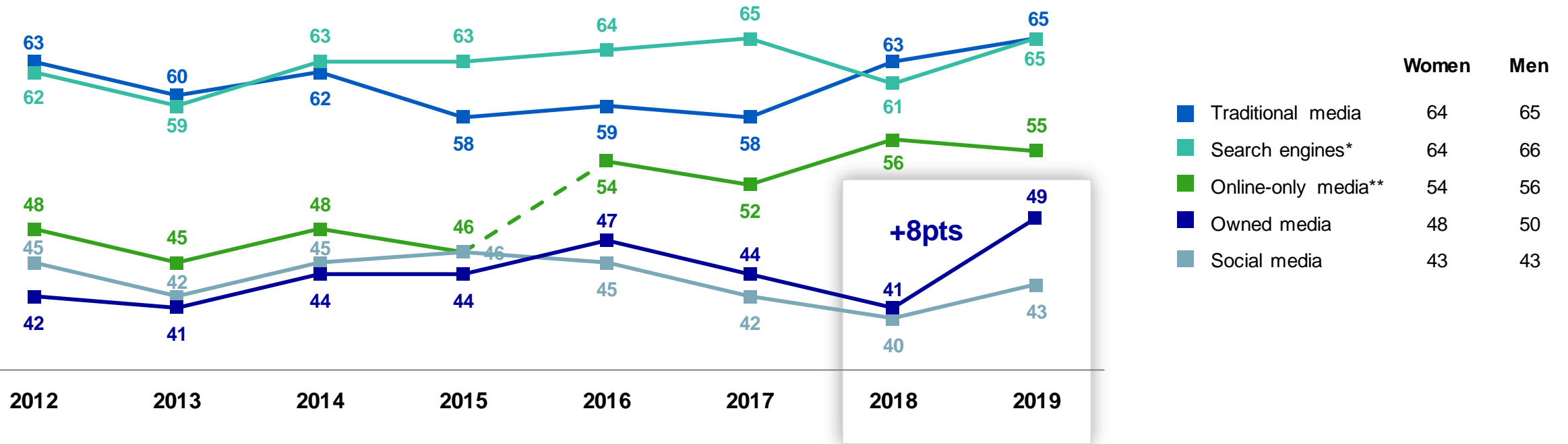
▲ Informed public



2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. Mass population and informed public, 26-market average, among amplifiers by gender. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

MORE SEE OWNED MEDIA AS A TRUSTED SOURCE

Percent trust in each source for general news and information



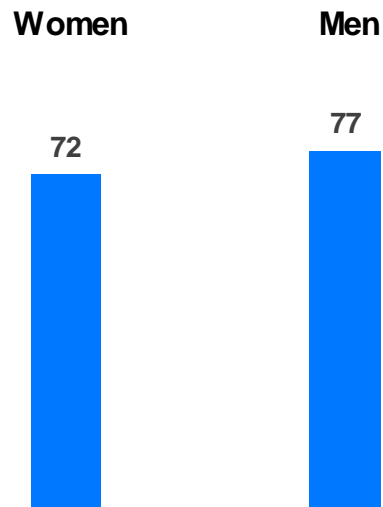
2019 Edelman Trust Barometer. COM_MCL When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 23-market average, and by gender.

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

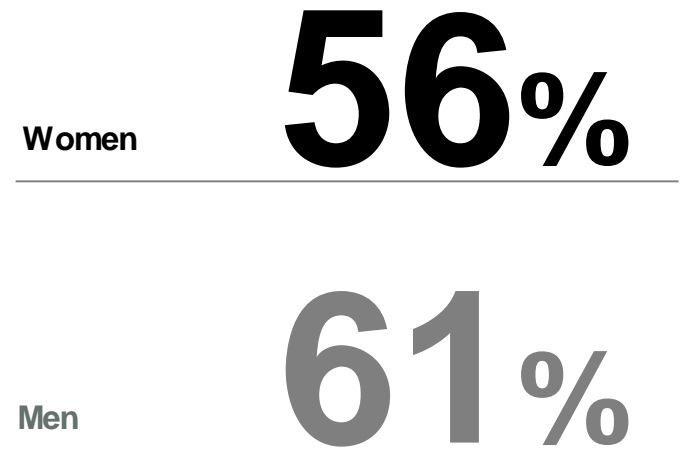
**From 2012-2015, “Hybrid Media” was included as a media type. In 2016, this was changed to “Online-Only media.”

EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

Percent trust in “my employer”



I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**

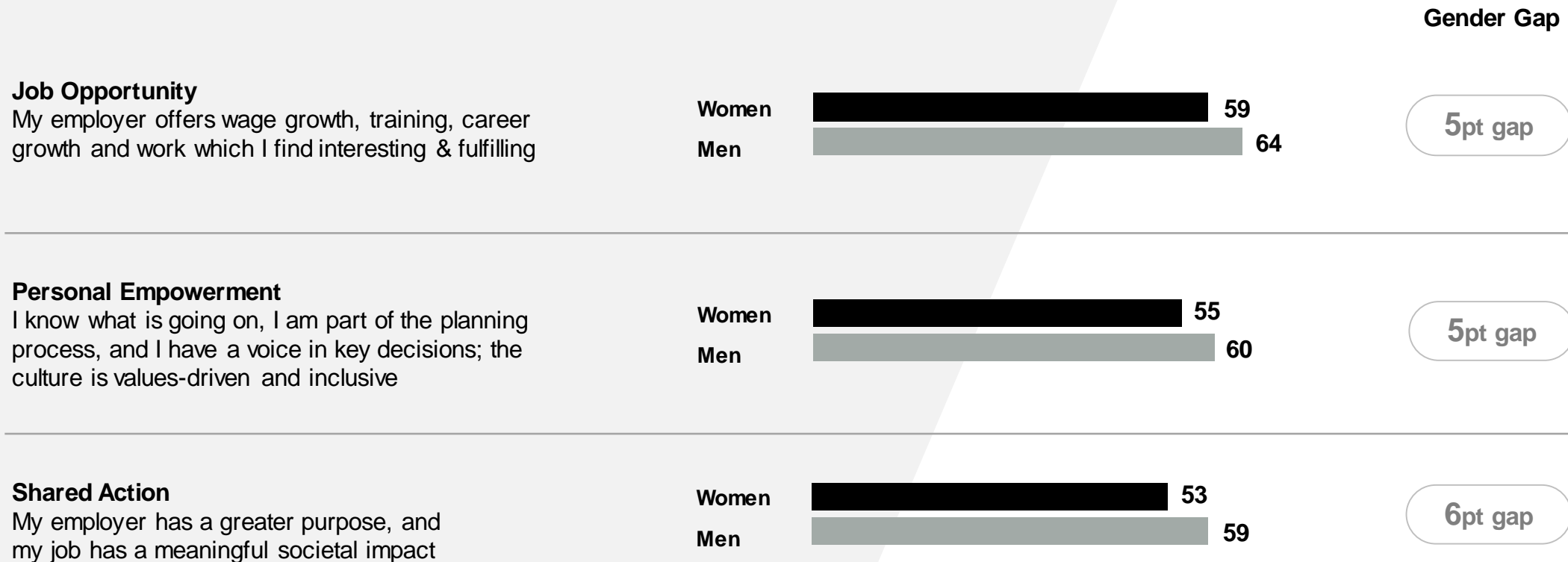


2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). 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, by gender.

For details on how the “system failing” measure was calculated, please refer to the Technical Appendix.

EMPLOYER PERFORMANCE: EMPLOYERS UNDERPERFORMING FOR WOMEN

Percent of employees who say their current employer is meeting each set of expectations



LOOKING FOR LEADERSHIP FROM CEOS

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

Women
74% 
+10pts

Men
78% 
+11pts

Percent who agree CEOs can create positive change in:

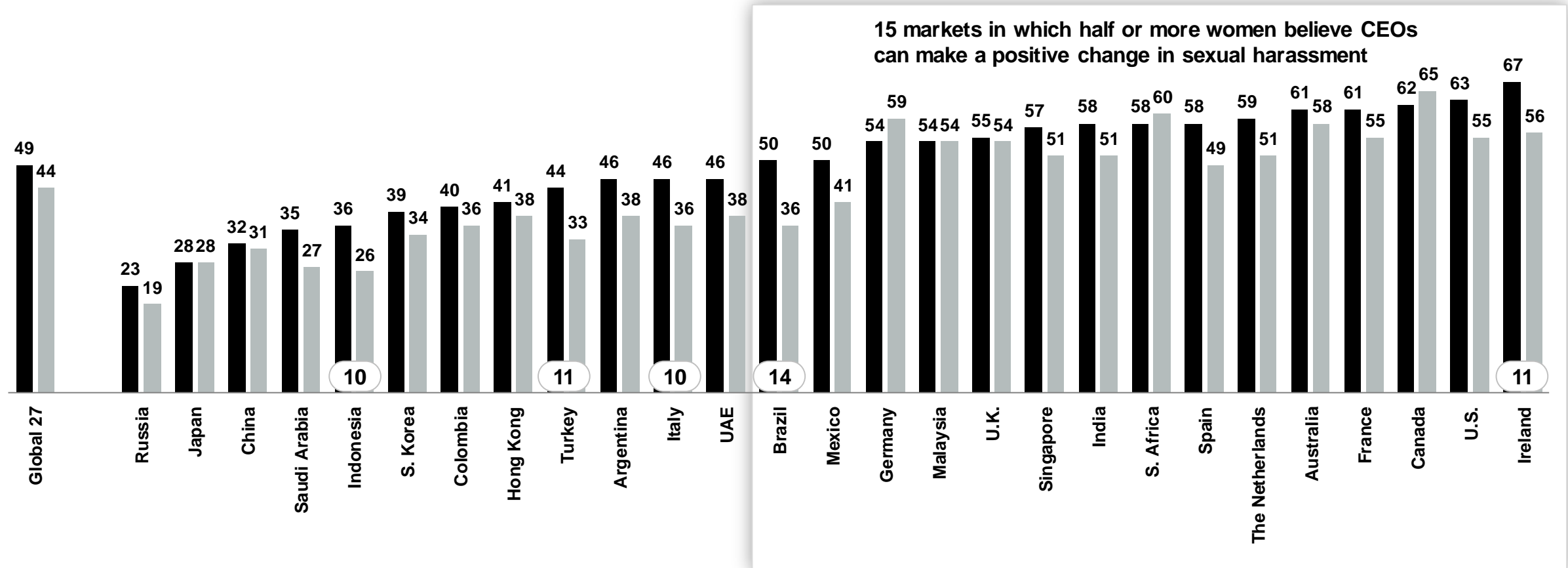
	Women	Men	Difference
Equal pay	68	62	6
Prejudice and discrimination	66	61	5
Training for the jobs of tomorrow	65	63	2
Personal data	57	54	3
The environment	56	56	0
Sexual harassment	49	44	5
Fake news	38	37	1

CEOS MUST ADDRESS SEXUAL HARASSMENT

Percent who agree CEOs can have a significant impact or create positive change in sexual harassment

■ Women ■ Men

○ Gender gap of 10 pts or higher



2019 Edelman Trust Barometer. CEO_SIG. In which of the following areas do you think CEOs can have significant impact or create the most positive change? Pick all that apply. Question asked of half of the sample. General population, 27-market average, by gender.

KEY ACTIONS FOR BUILDING TRUST

- 1 Get it right with your employees first.
- 2 CEOs have license to lead on equal pay.
- 3 Build brand stories that inspire women to engage.



SUPPLEMENTAL DATA

#TrustBarometer



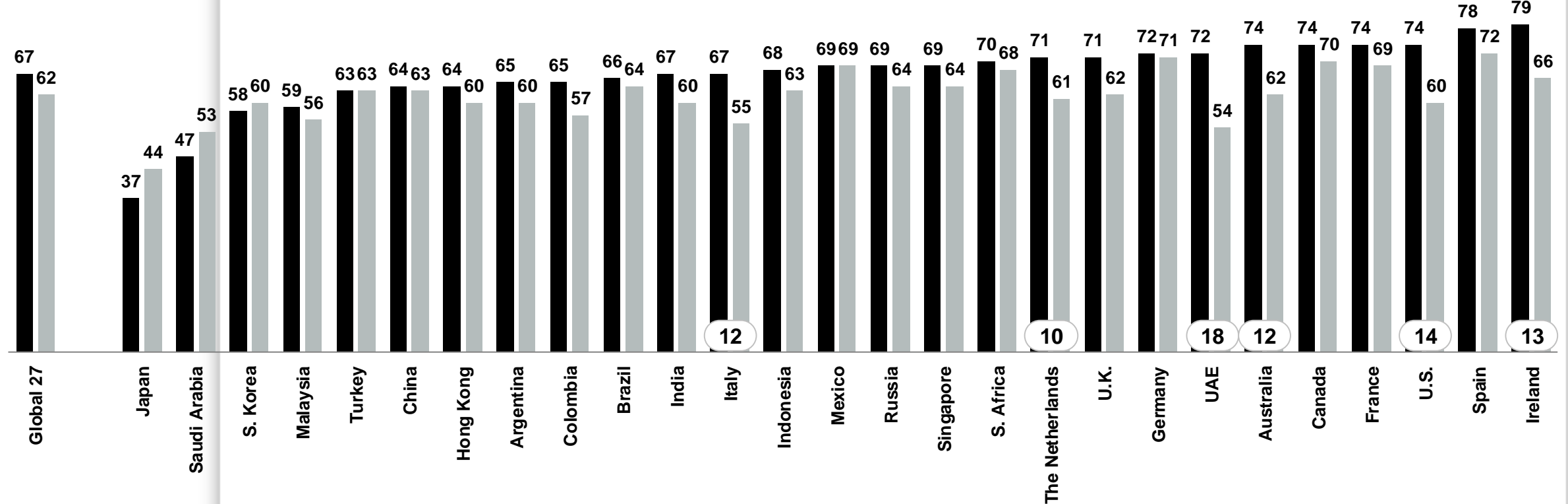
CEOS MUST ADDRESS EQUAL PAY

Percent who agree CEOs can have a significant impact or create positive change in equal pay

■ Women ■ Men

○ Gender gap of 10 pts or higher

25 markets in which half or more women believe CEOs can make a positive change in equal pay

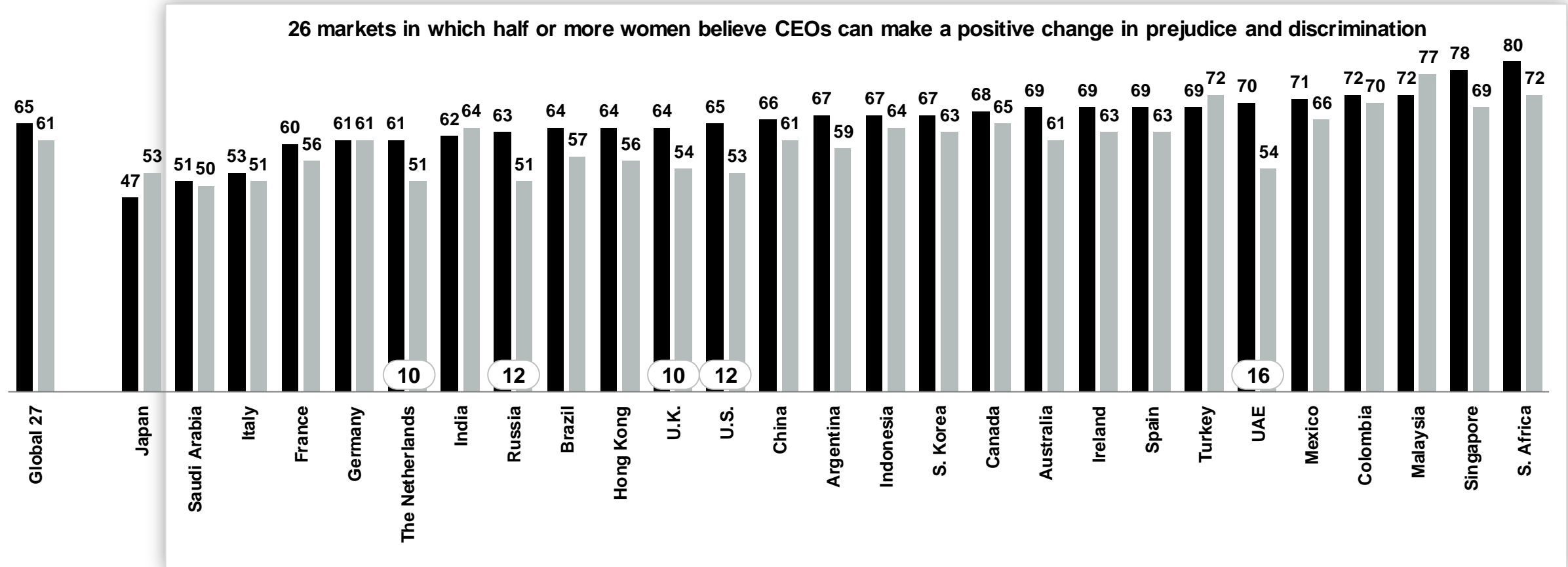


CEOS MUST ADDRESS PREJUDICE AND DISCRIMINATION

Percent who agree CEOs can have a significant impact or create positive change in prejudice and discrimination

■ Women ■ Men

○ Gender gap of 10 pts or higher



2019 EDELMAN TRUST BAROMETER WOMEN & TRUST TEAM

Chair & CEO, Edelman Canada and Chair, Latin America
Global Chair, Global Women's Equality Network (GWEN)

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