



# 2019 EDELMAN TRUST BAROMETER

## Methodology

### Online Survey in 27 Markets

33,000+ respondents total

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

■ Non-Hispanic White Americans

■ Oversample of Black Americans

■ Latinx oversample

■ Asian American oversample

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)

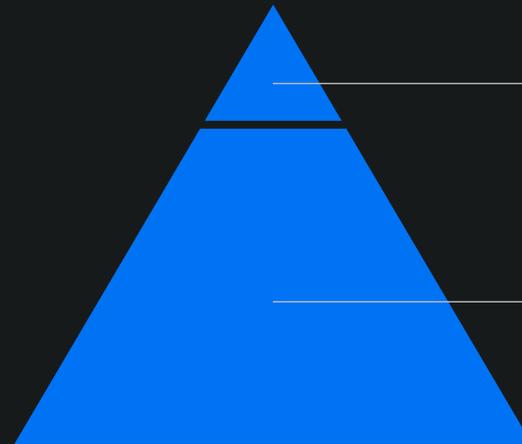
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

## 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



# Divided by Trust

# NO CONSENSUS ON MOST TRUSTED INSTITUTION

Percent trust

■ Distrust
 ■ Neutral
 ■ Trust

○ Community with highest agreement

White



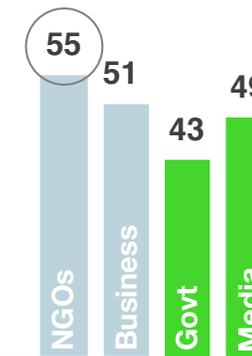
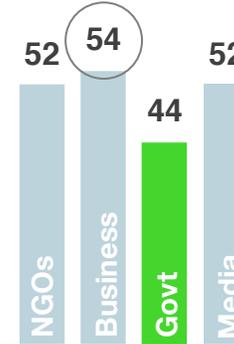
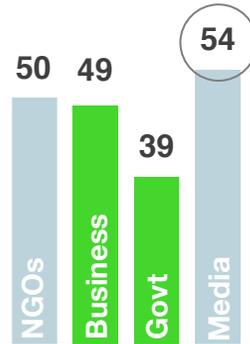
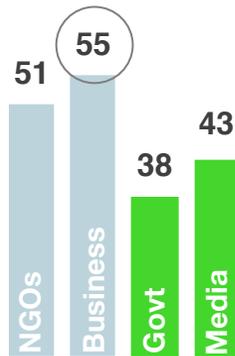
Black



Latinx



Asian American



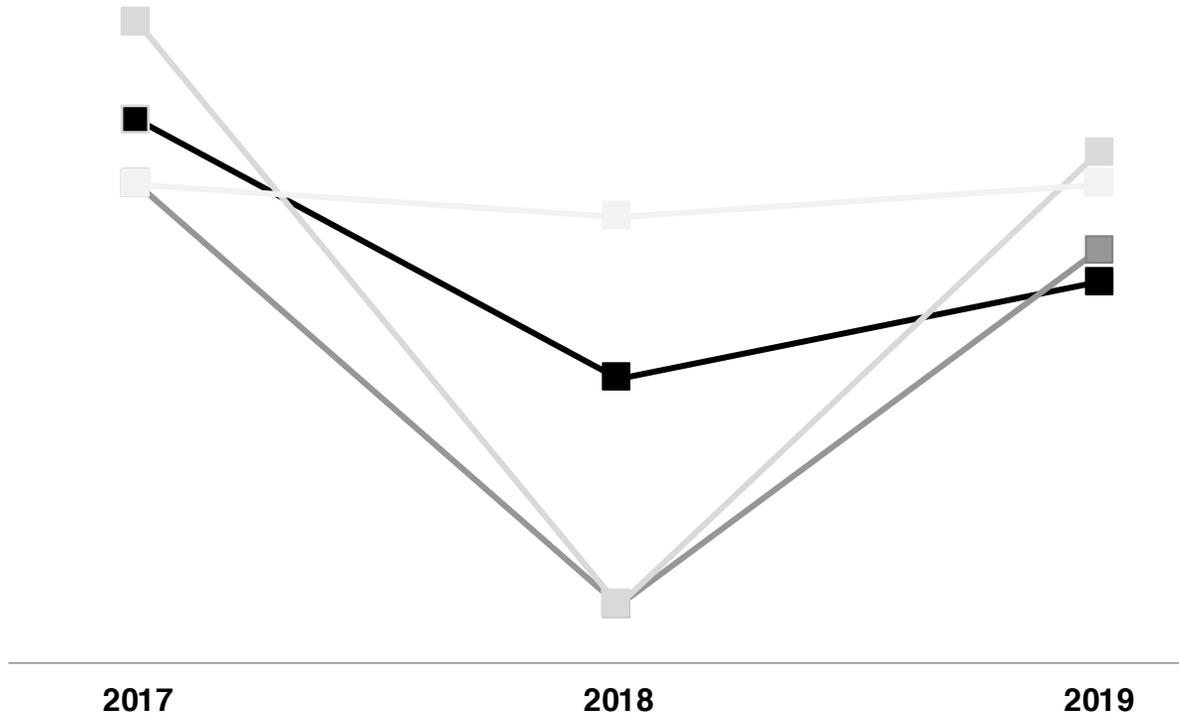
2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Non-Hispanic White, Black, Latinx and Asian American populations.

# U.S. COMMUNITIES OF COLOR HAVE YET TO REGAIN LOST TRUST

Trust index

■ Distrust ■ Neutral ■ Trust

● - 0 + Y-to-Y Change



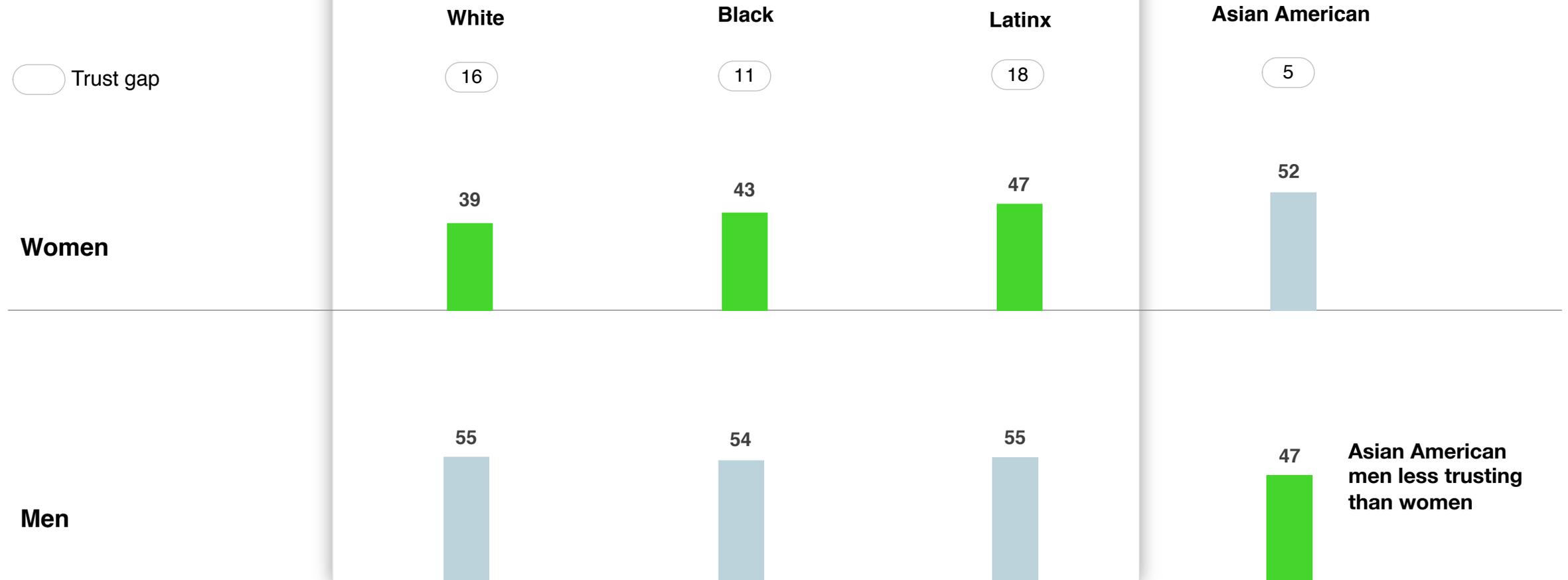
Ethnicity	2017	2018	2019	3 yr trend
Latinx	55	37	51	-4
Asian American	50	49	50	0
Black	50	37	48	-2
White	52	44	47	-5

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. Non-Hispanic White, Black, Latinx and Asian American populations.

# WOMEN TRUST LESS THAN MEN— EXCEPT AMONG ASIAN AMERICANS

■ Distrust ■ Neutral ■ Trust

Trust Index



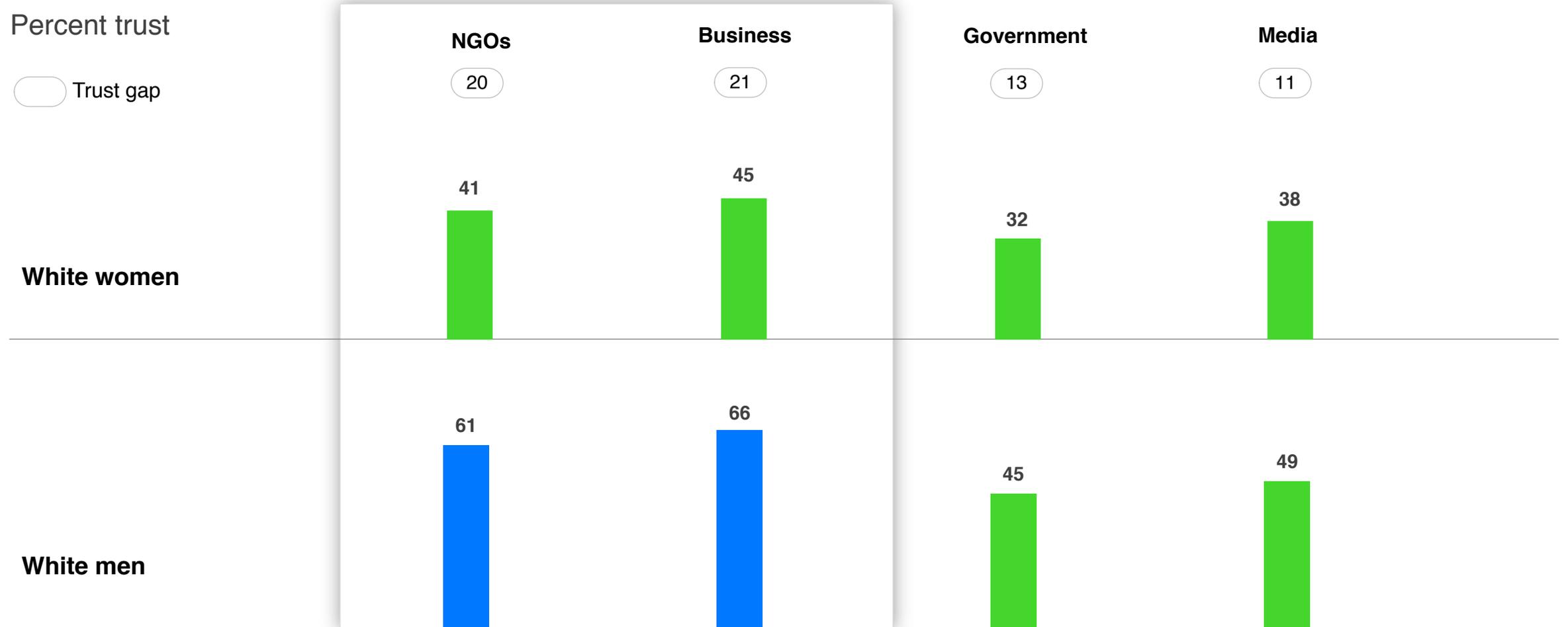
2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Non-Hispanic White, Black, Latinx and Asian American populations, by gender.

# WHITE WOMEN FAR LESS TRUSTING OF BUSINESS AND NGOS

Percent trust

Trust gap

Distrust Neutral Trust



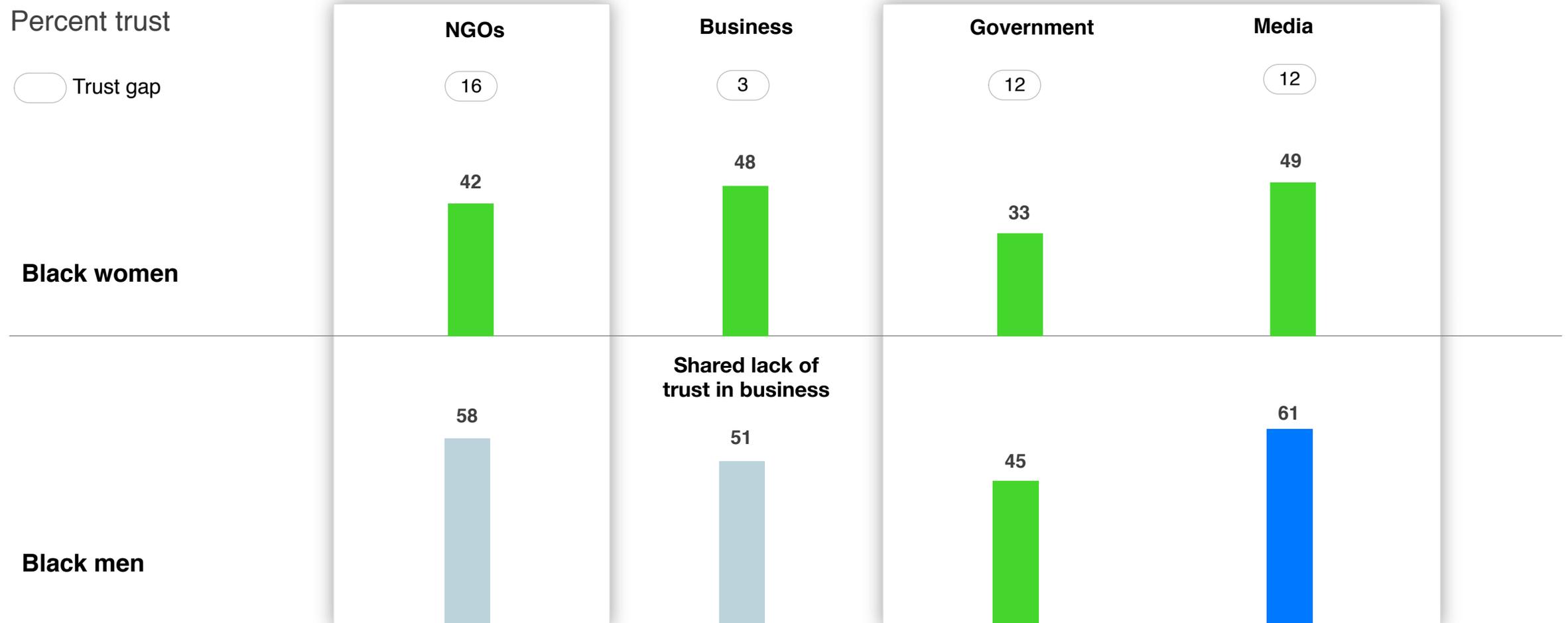
2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Non-Hispanic White population by gender.

# BLACK WOMEN FAR LESS TRUSTING OF NGOS, GOVERNMENT AND MEDIA

■ Distrust ■ Neutral ■ Trust

Percent trust

○ Trust gap

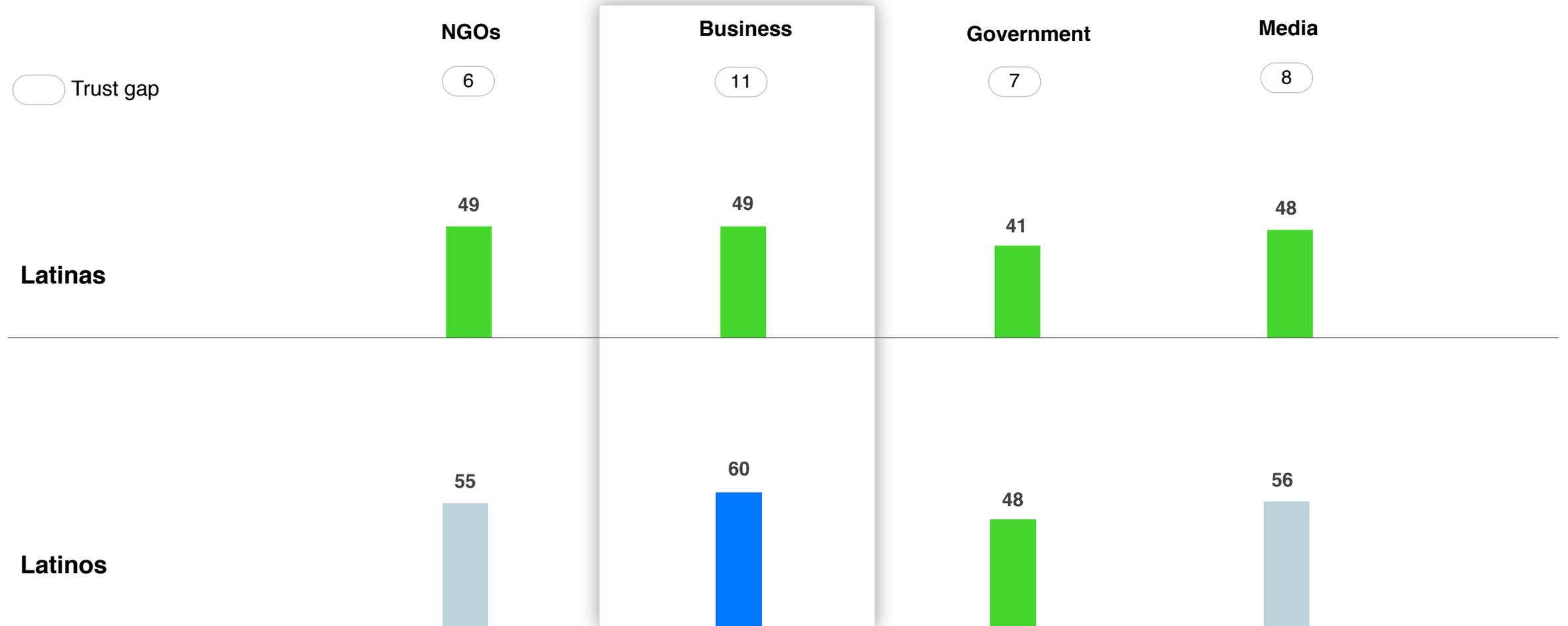


2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Black population by gender.

# LATINAS FAR LESS TRUSTING OF BUSINESS

Percent trust

■ Distrust ■ Neutral ■ Trust



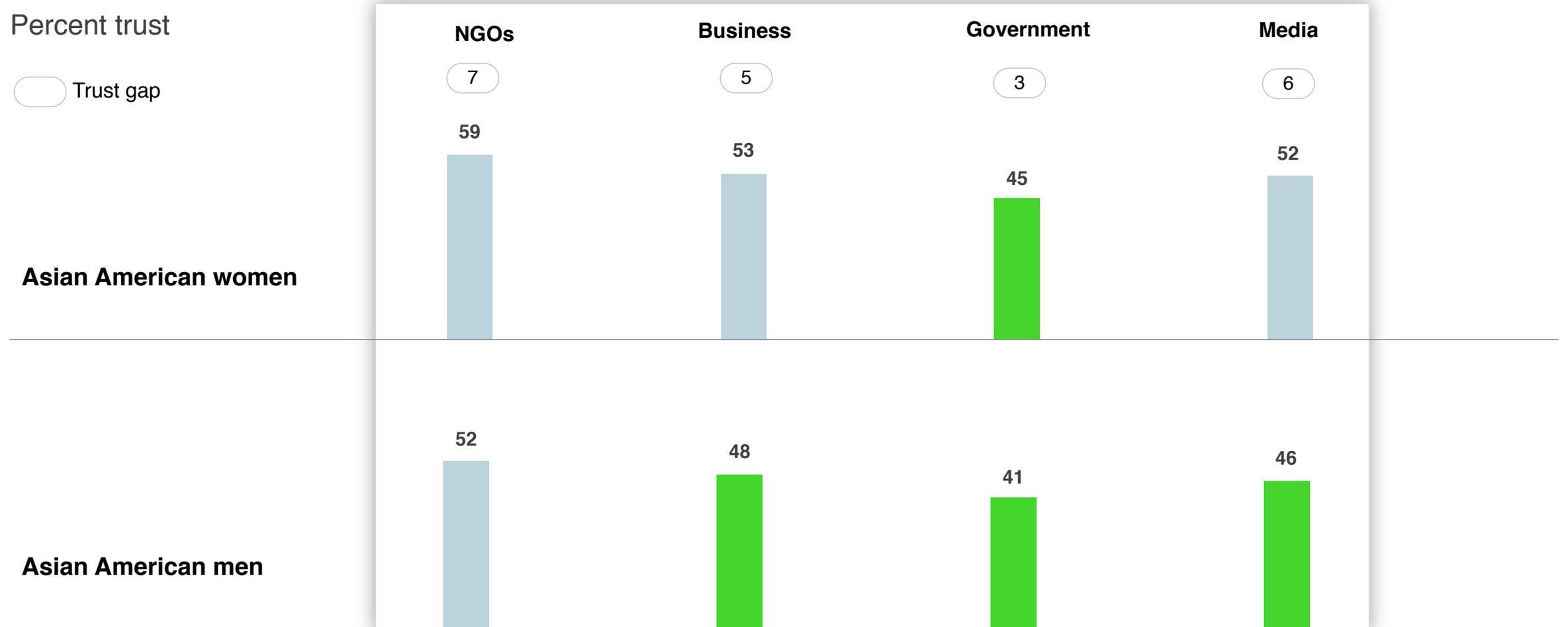
2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Latinx population, by gender.

# ASIAN AMERICAN WOMEN MORE TRUSTING ACROSS ALL FOUR INSTITUTIONS

■ Distrust ■ Neutral ■ Trust

Percent trust

○ Trust gap





# An Urgent Desire for Change

WE MUST ALL FACE  
THE CHOICE BETWEEN  
WHAT IS RIGHT  
AND WHAT IS EASY

Public  
schools  
Super  
collous  
Fascist  
Braggs  
doc

THIS IS FOR MY  
MOM WHO TAUGHT ME  
ABOUT FEMINISM  
REST-IN-PEACE

STAND  
MARCH  
RISE

KEEP YOUR  
POLICIES  
OFF MY BOSS

SILENCE  
WILL NOT  
PROTECT  
YOU

HATE  
WONT MAKE  
GREAT!

I'M  
WITH  
HER

EQUALITY  
FOR ALL!  
UNITED  
WE STAND!

FREE

TOO  
MANY  
THINGS  
WRONG  
FOR  
ONE  
SMALL  
POSTER!

WOMEN'S  
RIGHTS  
HUMAN  
CUTS

WHY I  
MARCH

I WILL  
NO LONGER

LOVE

PROTECT  
YOUR  
CHILDREN

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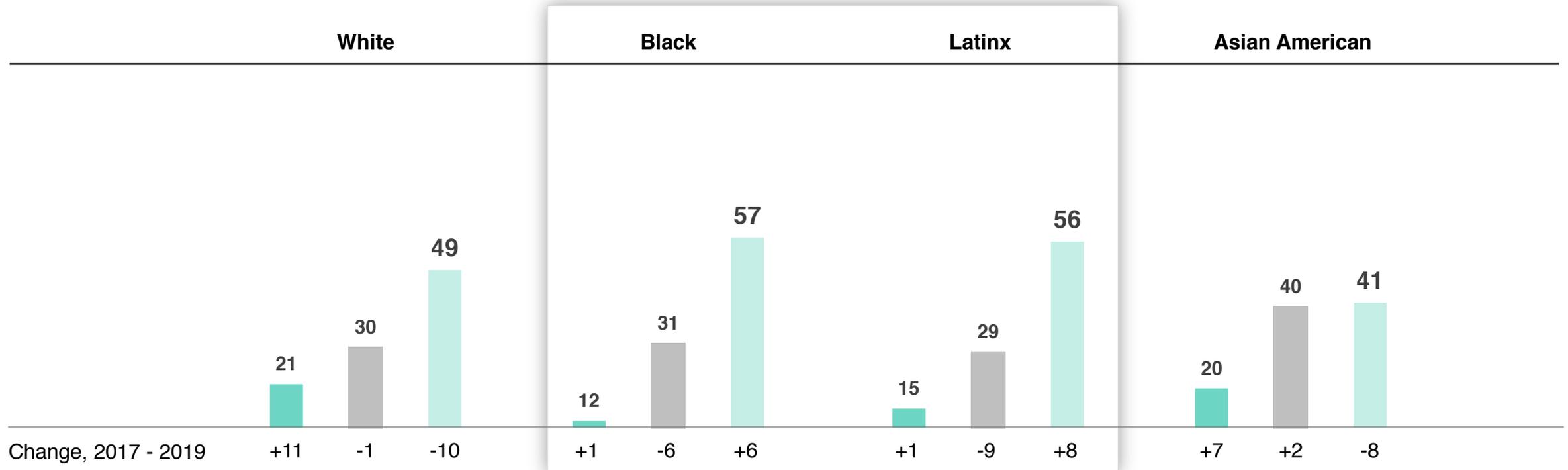
LOVE

PROTECT  
YOUR  
CHILDREN

# COMMUNITIES OF COLOR BELIEVE THE SYSTEM IS FAILING THEM

Percent in the U.S. who agree the system is...

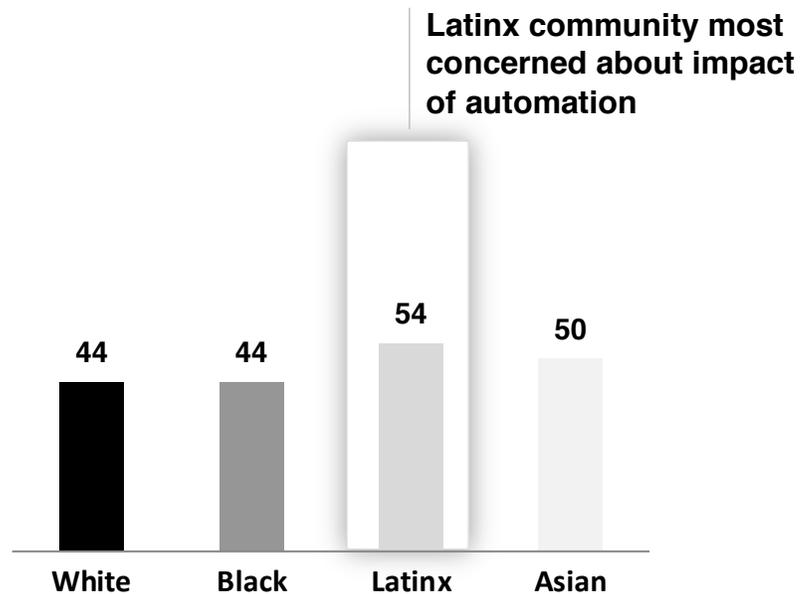
■ Working for me  
 ■ Not sure  
 ■ Failing me



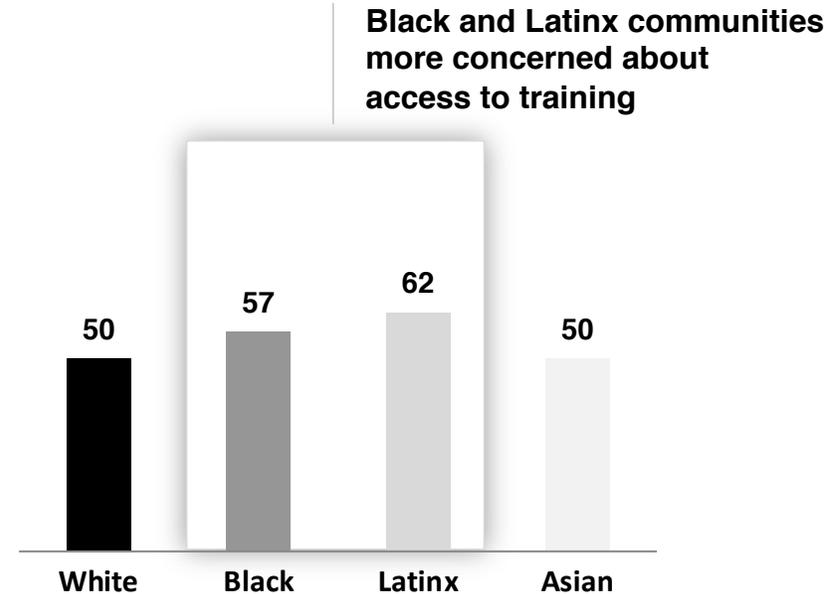
# FEARS OF JOB LOSS REMAIN HIGH ACROSS ETHNICITIES

Percent of employees across each race/ethnic population who worry about job loss due to each issue

**Automation** and/or other innovations taking your job away



Not having the **training** and skills necessary to get a good paying job



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). Employees among the Non-Hispanic White, Black, Latinx and Asian American populations.

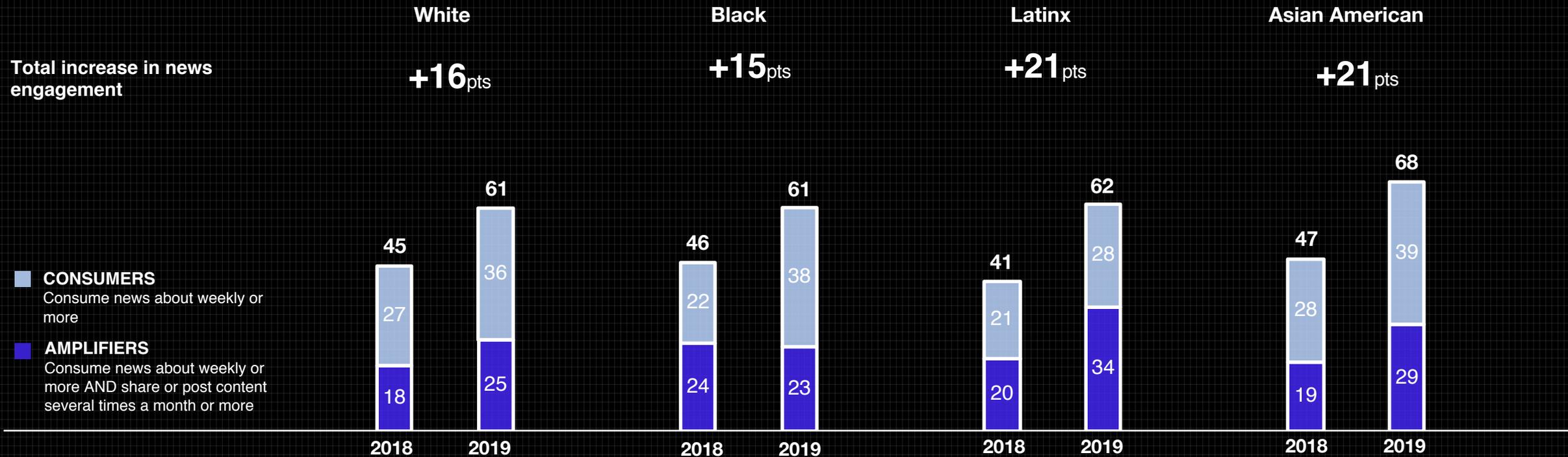




# Making Change Happen

# MASSIVE RISE IN NEWS ENGAGEMENT; LATINX AND ASIAN COMMUNITIES LEAD THE CHARGE

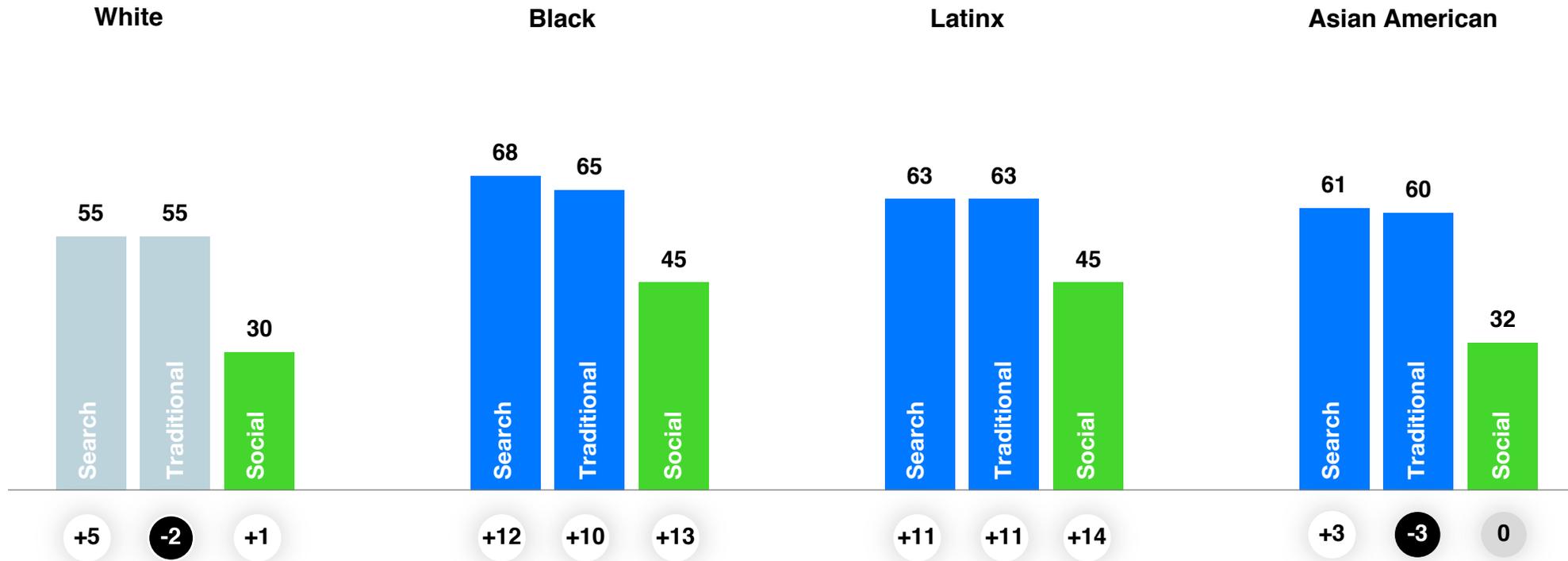
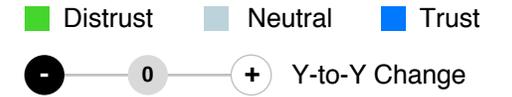
How often do you engage in the following activities related to news and information?



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. Non-Hispanic White, Black, Latinx and Asian American populations, by gender. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

# LOOKING FOR RELIABLE SOURCES

Percent across each race/ethnic population who trust each source of news



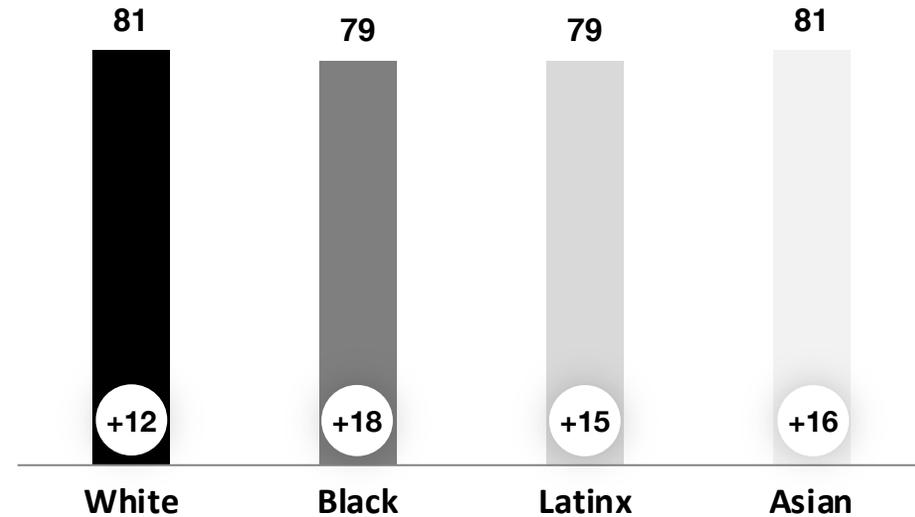
2019 Edelman Trust Barometer. COM\_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; top 4 box, trust. Question asked of half of the sample. Non-Hispanic White, Black, Latinx and Asian American populations.

# U.S. LOOKING FOR LEADERSHIP FROM CEOS

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

**81%**  **12pts**

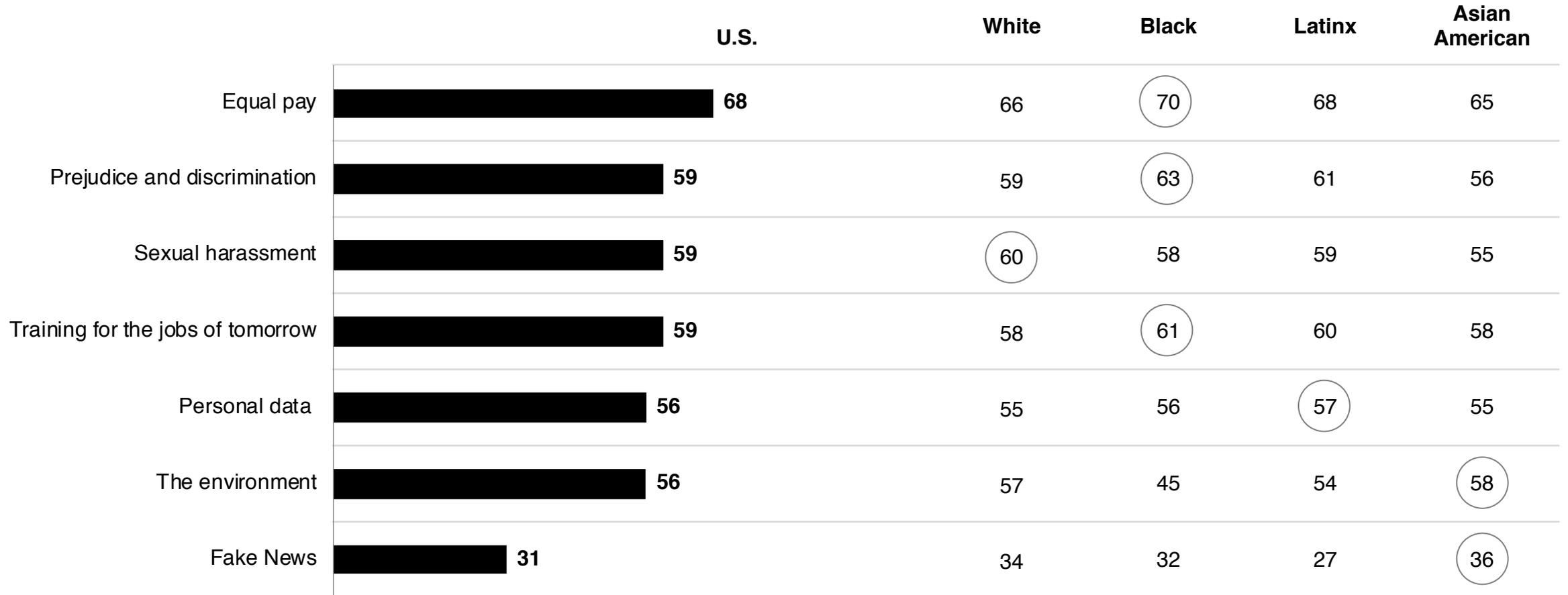
 Y-to-Y Change



# SHARED EXPECTATION THAT CEOs WILL ADDRESS SOCIETAL ISSUES

Percent who agree CEOs can create positive change in:

○ Community with highest agreement



# LOOKING FOR LEADERSHIP FROM MY EMPLOYER

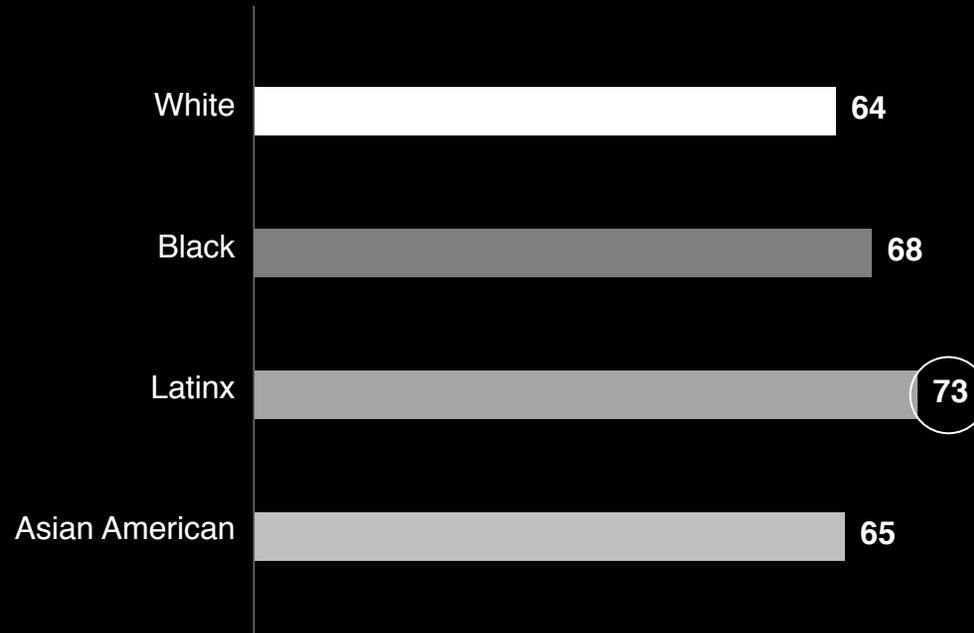
Percent in U.S. who look to their employers to act

○ Community with highest agreement

# 66%

of U.S. 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. 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? Pick all that apply. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, U.S. and employees among the Non-Hispanic White, Black, Latinx and Asian American populations. 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”.



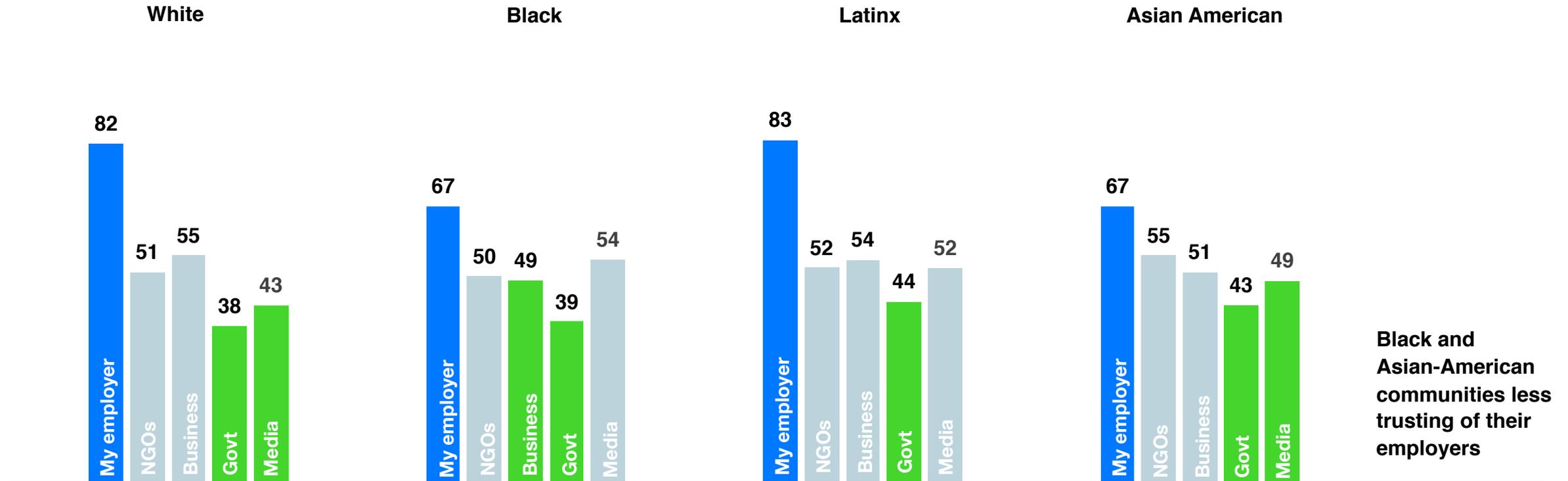


**My Employer:  
A Trusted Partner  
for Change**

# MY EMPLOYER MOST-TRUSTED RELATIONSHIP ACROSS COMMUNITIES

■ Distrust ■ Neutral ■ Trust

Percent trust



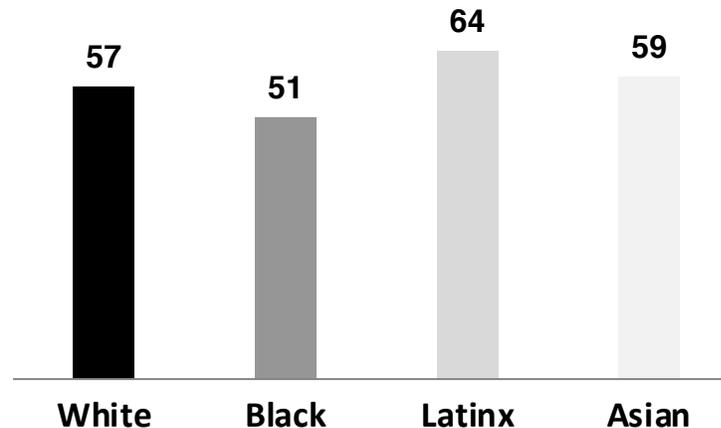
2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. “Your employer” asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). Non-Hispanic White, Black, Latinx and Asian American populations.



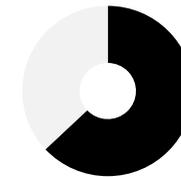
# EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

Percent of all segments who agree; with the Latinx segment leading

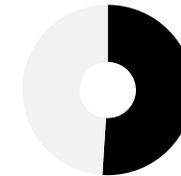
I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**



**U.S. employees see business as trustworthy source on:**



**63%**  
The Global Economy



**51%**  
Technology

 **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). Employees among the Non-Hispanic White, Black, Latinx and Asian American populations. BUS\_SRC. Below is a list of topics and social issues. Please indicate about which of the following you believe business in general to be a trustworthy information source. Question asked of half of the sample. General population, U.S., among those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7).

“The Economy” is a net of BUS\_SRC/3,7,8,9,10; “Technology” is a net of BUS\_SRC/2,5,6,11.

A black and white photograph of a woman in a meeting room, looking thoughtfully to the right. She is wearing a dark jacket. The room contains a table with papers, a pen holder, and a glass. In the background, another person is visible. Overlaid on the image are several thin, blue, wavy lines that flow from the bottom left towards the top right, creating a sense of movement and connectivity.

# Trust at Work

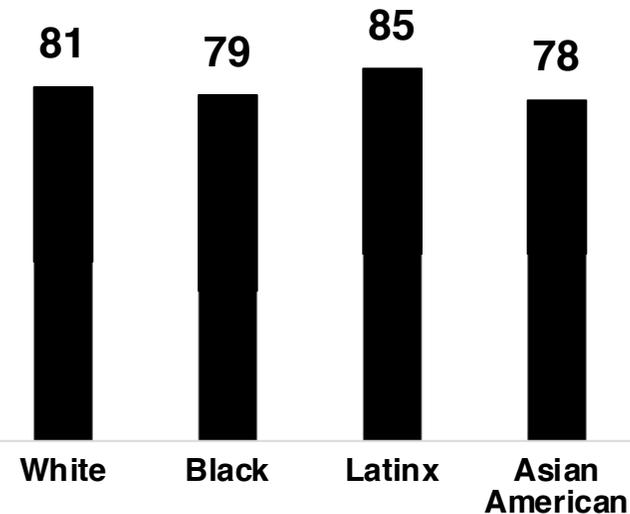
# U.S. EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

Percent of employees across each race/ethnic population who expect each from a prospective employer

○ Community with highest agreement

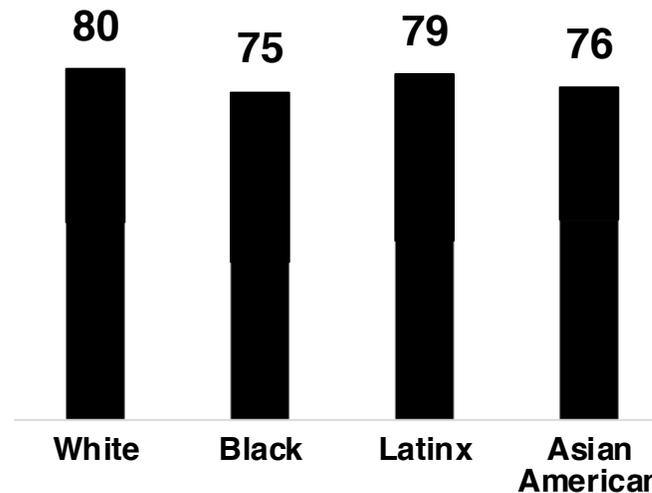
## Job Opportunity

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



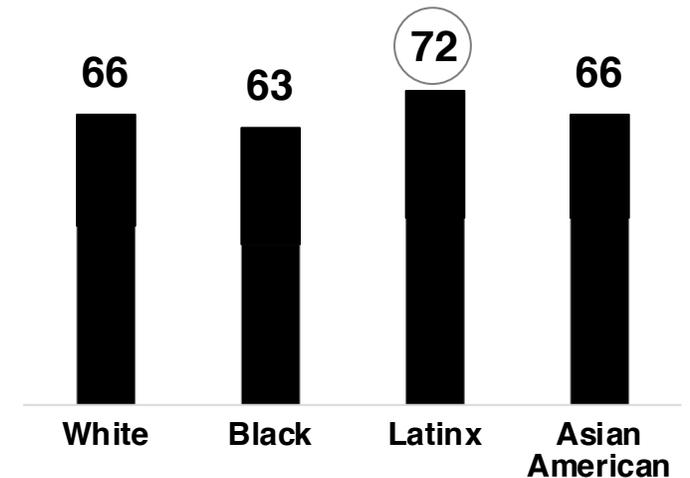
## Personal Empowerment

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



## Shared Action

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

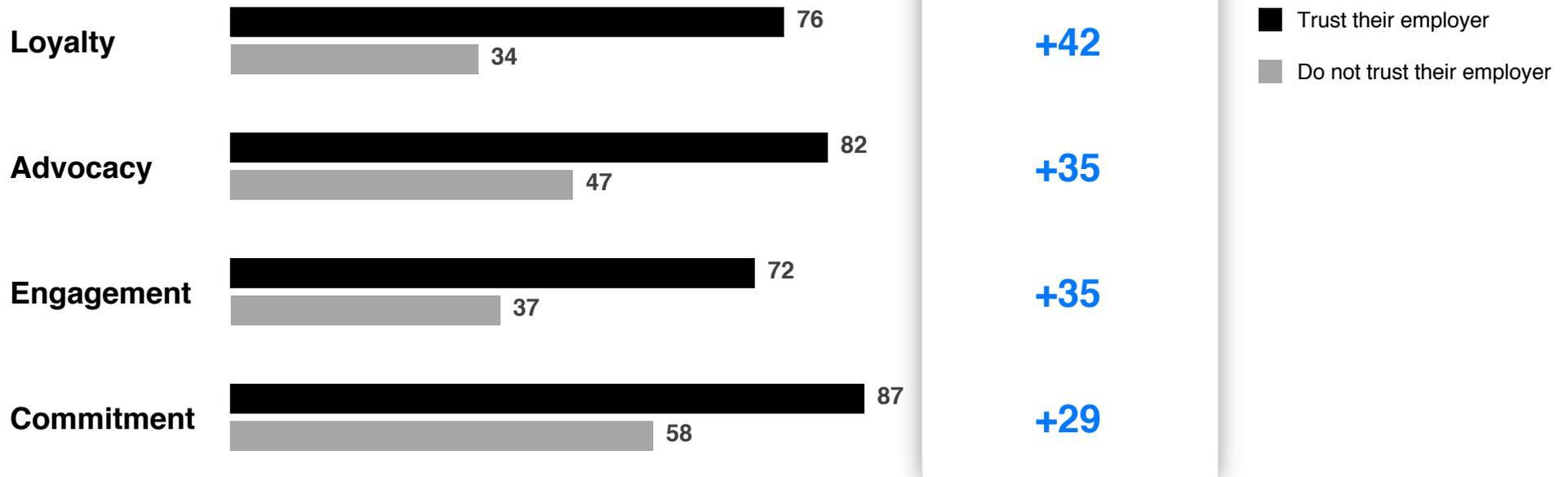


2019 Edelman Trust Barometer. EMP\_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). Employees among the Non-Hispanic White, Black, Latinx and Asian American populations. 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.



# TRUST CEMENTS THE EMPLOYER-EMPLOYEE PARTNERSHIP

Percent of U.S. 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, U.S., 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, U.S. 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.

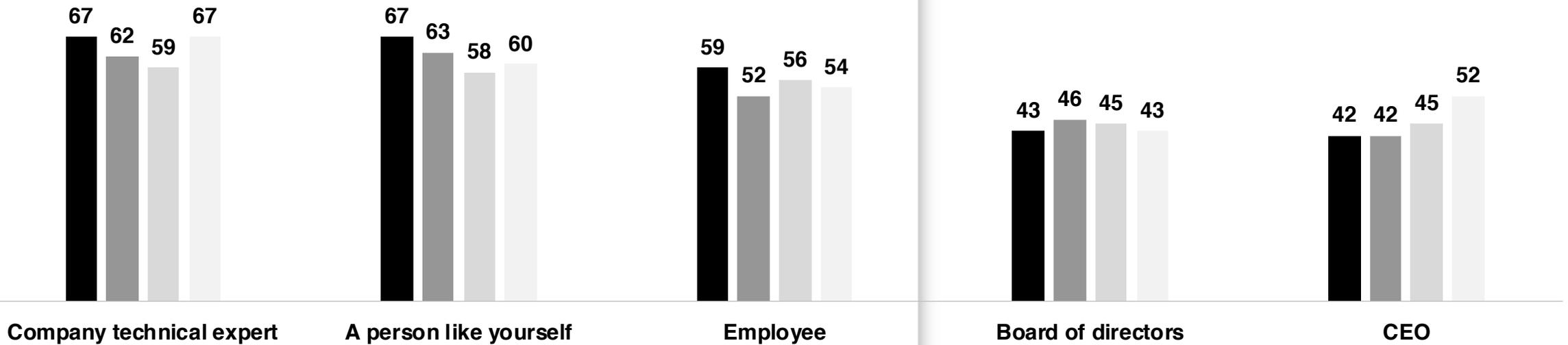


# ACTIVATE EMPLOYEE VOICES

Percent who rate each spokesperson as very/extremely credible

■ White ■ Black ■ Latinx ■ Asian American

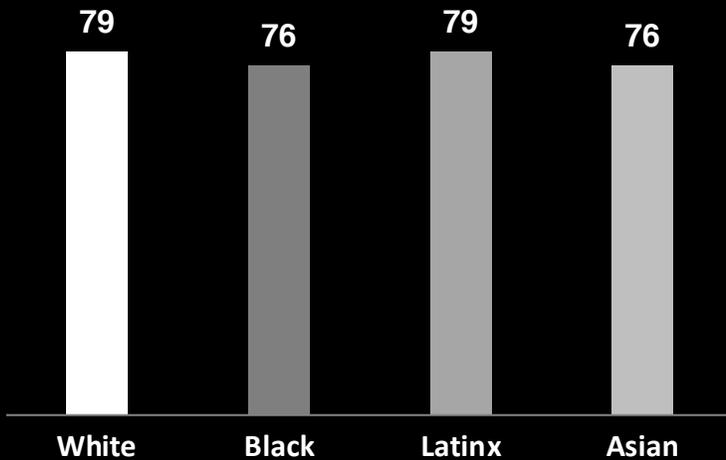
## Spokespeople with credibility among majority of all communities



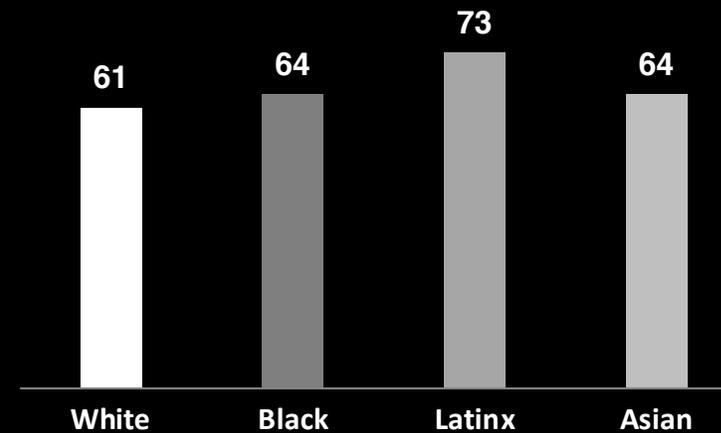
2019 Edelman Trust Barometer. CRE\_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all. 4-point scale; top 2 box, credible. Question asked of half of the sample. Non-Hispanic White, Black, Latinx and Asian American populations.

# INVESTING IN EMPLOYEE TRUST IS INVESTING IN YOUR BOTTOM LINE

How a company treats its employees is one of the best indicators of its level of trustworthiness



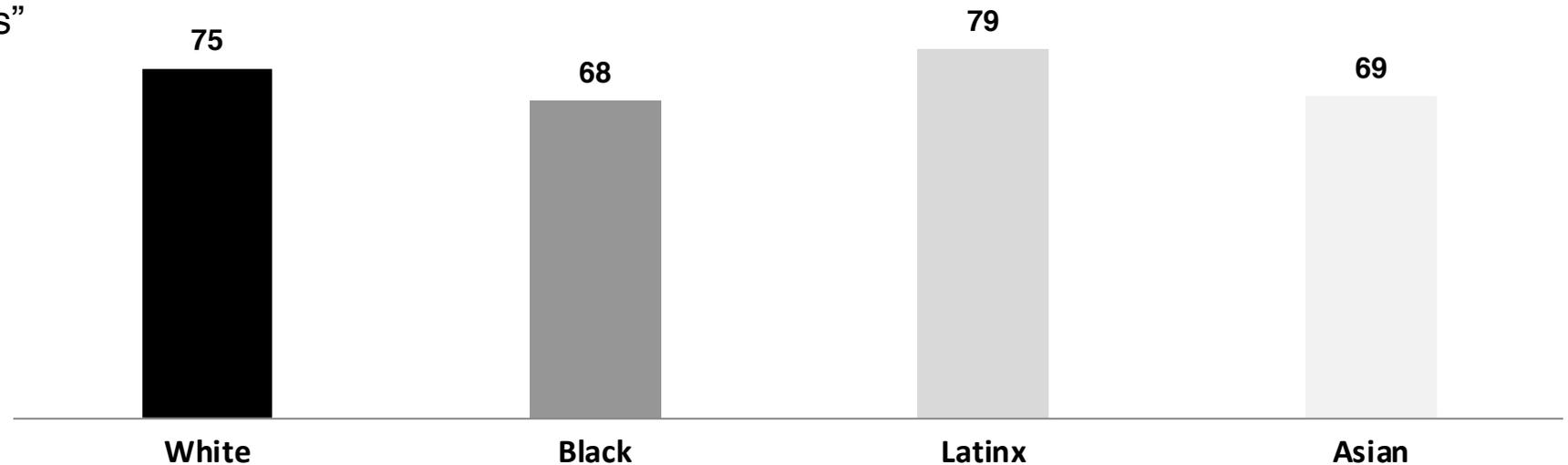
Percent who agree that “a good reputation may get me to try a product, but unless I come to trust the company behind the product, I will soon stop buying it



# COMPANIES CAN IMPROVE SOCIETY AND ALSO DO WELL

Percent who agree with the following statement

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



# TRUST AT WORK: THE NEW EMPLOYER-EMPLOYEE CONTRACT

## 1. Lead Change

- Be aspirational
- Promote a diverse workforce
- Train the workforce of the future

## 2. Empower Employees

- Activate diverse voices
- Create opportunities for shared action
- Empower them with information

## 3. Start at Home

- Improve societal conditions in the communities where you operate
- Commit to causes and organizations important to your employees

## 4. CEO Leadership

- Live your values
- Engage directly
- Be visible and show a personal commitment, inside and outside the organization



# Tech Appendix

# SAMPLE SIZE, QUOTAS AND MARGIN OF ERROR

	General Population			Informed Public		
	Sample Size*	Quotas Set On**	Margin of Error	Sample Size*	Quotas Set On***	Margin of Error
Global	31,050	Age, Gender, Region	+/- 0.6% total sample +/- 0.8% half sample	6000	Age, Education, Gender, Income	+/- 1.3% total sample +/- 1.8% split sample
China and U.S.	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	500	Age, Education, Gender, Income	+/- 4.4% total sample +/- 6.2% split sample
All other markets	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	200	Age, Education, Gender, Income	+/- 6.9% total sample +/- 9.8% split sample
U.S. Non-Hispanic White	682	Age, Gender, Region	+/- 3.8% total sample +/- 5.3% half sample			
Black	400	Age, Gender, Region	+/- 4.9% total sample +/- 6.9% half sample			
Asian American	300	Age, Gender, Region	+/- 5.7% total sample +/- 8.0% half sample			
Latinx	400	Age, Gender, Region	+/- 4.9% total sample +/- 6.9% half sample			

\* Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.

\*\* In the U.S., U.K. and UAE, there were additional quotas on ethnicity.

\*\*\* In the UAE, there were additional quotas on ethnicity.

# DEMOGRAPHICS DETAILS

	General Population		College Experience		Employment	Age			Income			Regions			
	Sample Size*	Margin of Error	Some college	Graduated college	Employed	18-34	35-54	55+	Low	Middle	High	Northeast	Midwest	South	West
U.S. Non Hispanic White	682	3.8	24	51	43	26	34	39	14	52	34	19	26	35	20
Black	400	4.9	33	44	47	36	35	29	25	54	22	17	18	57	9
Asian American	300	5.7	12	77	53	34	38	29	10	43	48	21	12	22	45
Latinx	400	4.9	27	48	46	41	38	21	21	55	24	14	9	37	40

2019 Edelman Trust Barometer. S7US. What is the last grade in school you completed? Q206. Which of the following best describes your current employment status? S15. What is your current age? S8US. Thinking about your annual household income in 2017, which of the following categories best describes your total household income that year? S2. Where do you live? Non-Hispanic White, Black, Latinx and Asian American populations.

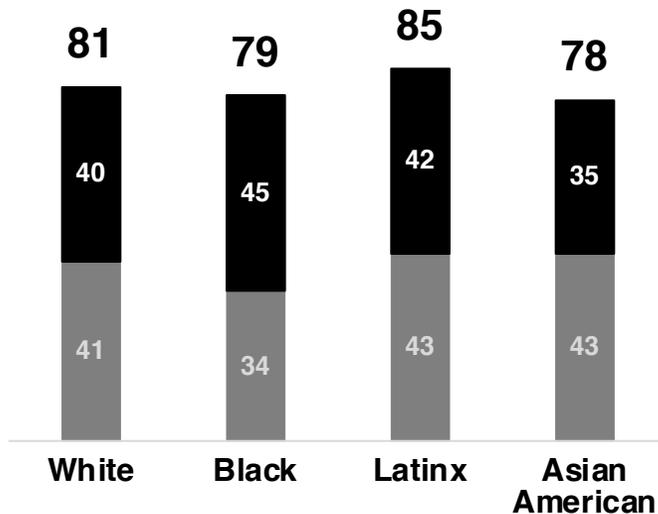
# U.S. EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

Percent of U.S. employees who expect each from a prospective employer

- Deal breaker**  
 I would **never** work for an organization that does not offer this
- Strong expectation**  
 You would have to **pay me a lot more** to work for an organization that does not offer this

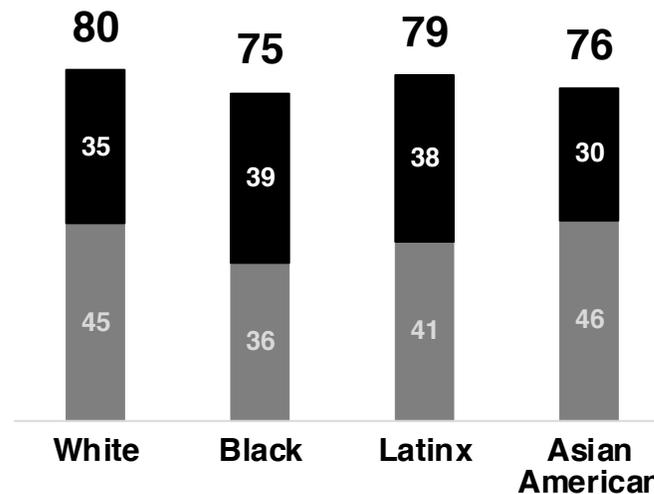
## Job Opportunity

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



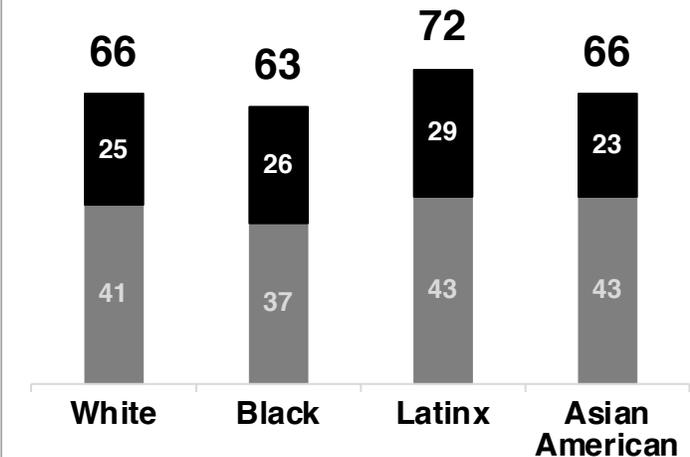
## Personal Empowerment

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



## Shared Action

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



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, U.S. 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.

