Special Report:
Trust in Technology

Edelman Trust Barometer 2020

Edelman

20th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online survey in 28 markets

34,000+ respondents total

All fieldwork was conducted between October 19 and November 18, 2019

28-market global data margin of error: General population +/- 0.6% (N=32,200), informed public +/- 1.2% (N=6,200), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8% (N=16,100).

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 736, varies by market).

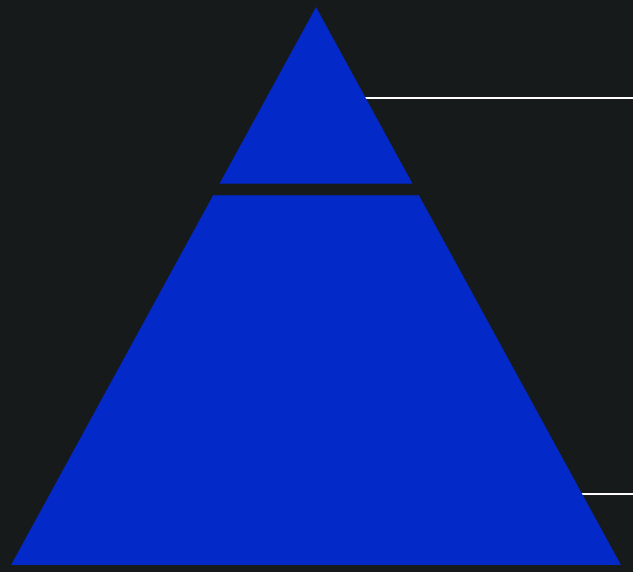
Gen Z MOE: 28-market = +/- 1.5% (N=4,310)
Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

General Online Population

1,150 respondents per market

Ages **18+**

All slides show general online population data unless otherwise noted



2020 Gen Z oversample

250 respondents age **18-24** per market

Informed Public

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

Represents **17%** 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

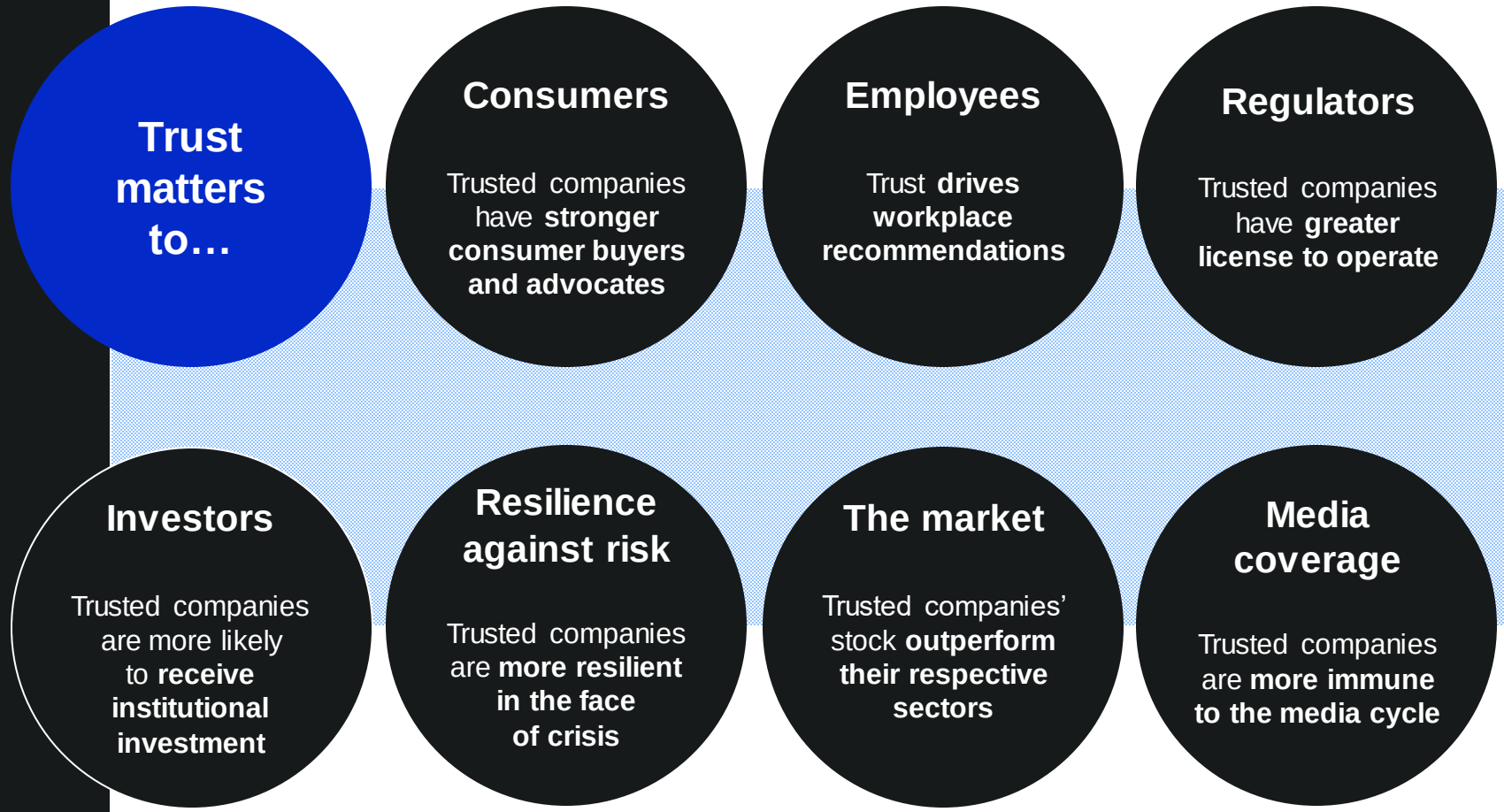
All population not including informed public

Represents **83%** of total global population

TRUST ESSENTIAL FOR FUTURE SUCCESS

20 years of Edelman research on trust

- 2M+ respondents
- 400+ companies
- 80k employee reviews
- Interviews with 50+ business leaders
- 23M measures of trust
- Review of 150+ academic articles and 80+ models of trust
- Trust and stock price analysis for 80 companies



20 YEARS OF TRUST

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
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
2011	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**
Business Must Partner With Government to Regain Trust	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**

CONTINUED DISTRUST

Trust Index

Global Trust Index increases 1 pt., with increases in 16 of 26 markets measured

12 of 26 markets are distrusters, down 2 from 2019

2020 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, 26-mkt avg.

2019 General population	
53	**Global 26**
79	China
73	Indonesia
72	India
71	UAE
70	Saudi Arabia
62	Singapore
59	Malaysia
58	Mexico
56	Canada
55	Hong Kong
54	The Netherlands
52	Colombia
49	U.S.
48	Australia
46	Argentina
46	Brazil
46	Italy
46	S. Korea
45	S. Africa
44	France
44	Germany
43	U.K.
42	Ireland
40	Spain
39	Japan
29	Russia

2020 General population	
54	**Global 26**
82	China
79	India
73	Indonesia
65	UAE
62	Mexico
62	Singapore
61	Saudi Arabia
60	Malaysia
57	The Netherlands
53	Canada
53	Colombia
51	Brazil
50	Hong Kong
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	U.K.
30	Russia

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

\- 0 +

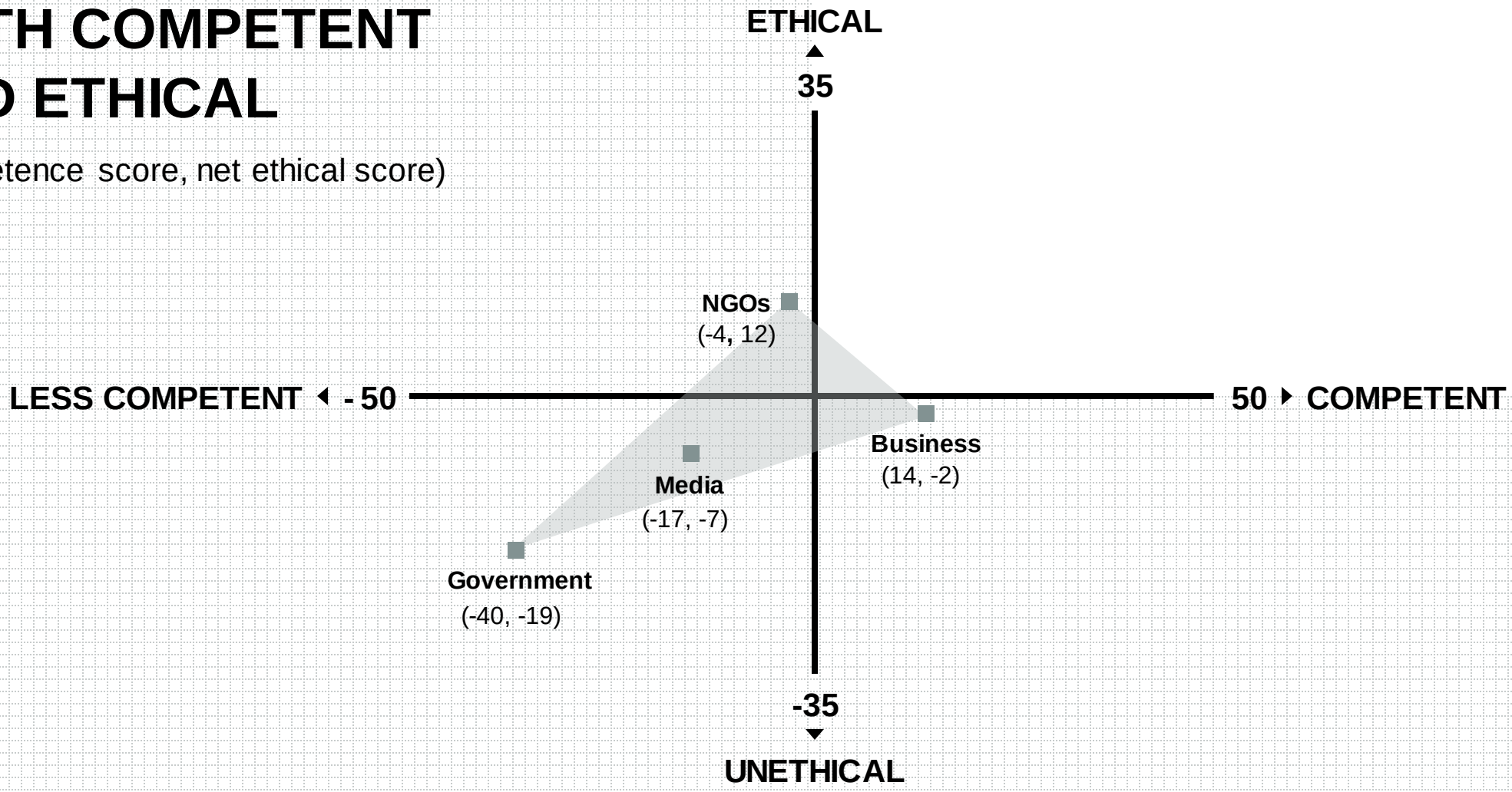
Change, 2019 to 2020

Declines in

Saudi Arabia	-9
UAE	-6
Hong Kong	-5
Canada	-3
U.S.	-2
Australia	-1
S. Africa	-1
U.K.	-1

NO INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL

(Competence score, net ethical score)



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D _[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, 25-mkt avg. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

UNPREPARED FOR THE FUTURE

WORRY TECHNOLOGY IS OUT OF CONTROL

Percent who agree

The pace of change in technology is **too fast**

61%

I worry technology will make it impossible to know if **what people are seeing or hearing is real**

66%

Government **does not understand emerging technologies** enough to regulate them effectively

61%

Trust in technology 2019-2020	
Global 26	**-4**
Largest declines in:	
France	**-10**
Canada, Italy, Russia, Singapore	**-8**
U.S.	**-7**
Australia	**-6**

2020 Edelman Trust Barometer. CNG_POC. For the statements below, please think about the pace of development and change in society today and select the response that most accurately represents your opinion. 9-point scale; top 4 box, fast. 28-mkt avg. 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. 28-mkt avg. PER_GOV. How well do you feel the government is currently doing each of the following? 5-point scale; bottom 3 box, not doing well (data excludes DK responses). 25-mkt avg. (data not collected in China, Russia, and Thailand). TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. 26-mkt avg. All questions asked of half of the sample among the general population.

WORRY ABOUT QUALITY INFORMATION

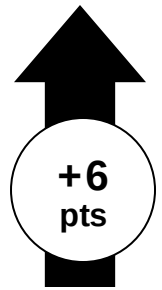
Percent who agree

The media I use are **contaminated with untrustworthy information**

57%

I worry about false information or **fake news being used as a weapon**

76%



Change, 2018 to 2020

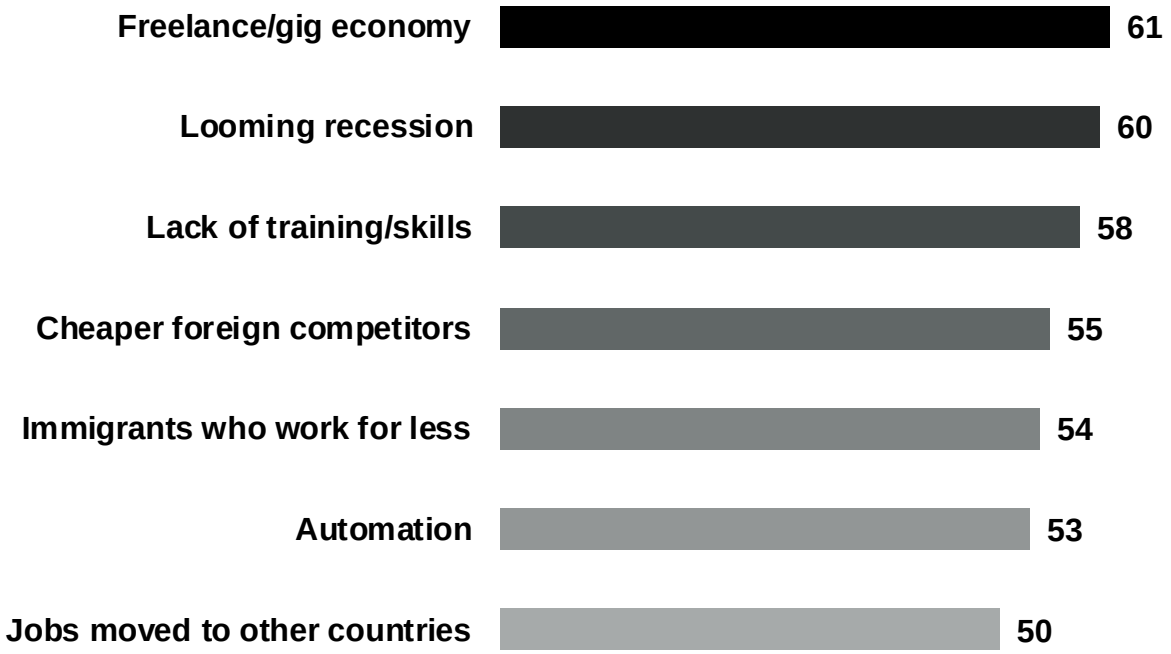
2020 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 25-mkt avg. Data on the left not collected in China, Russia and Thailand. Data on the right excludes Kenya, Thailand, and Saudi Arabia.

WORRY ABOUT THE FUTURE OF WORK

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

I worry about **losing my job** due to one or more of these causes

83%

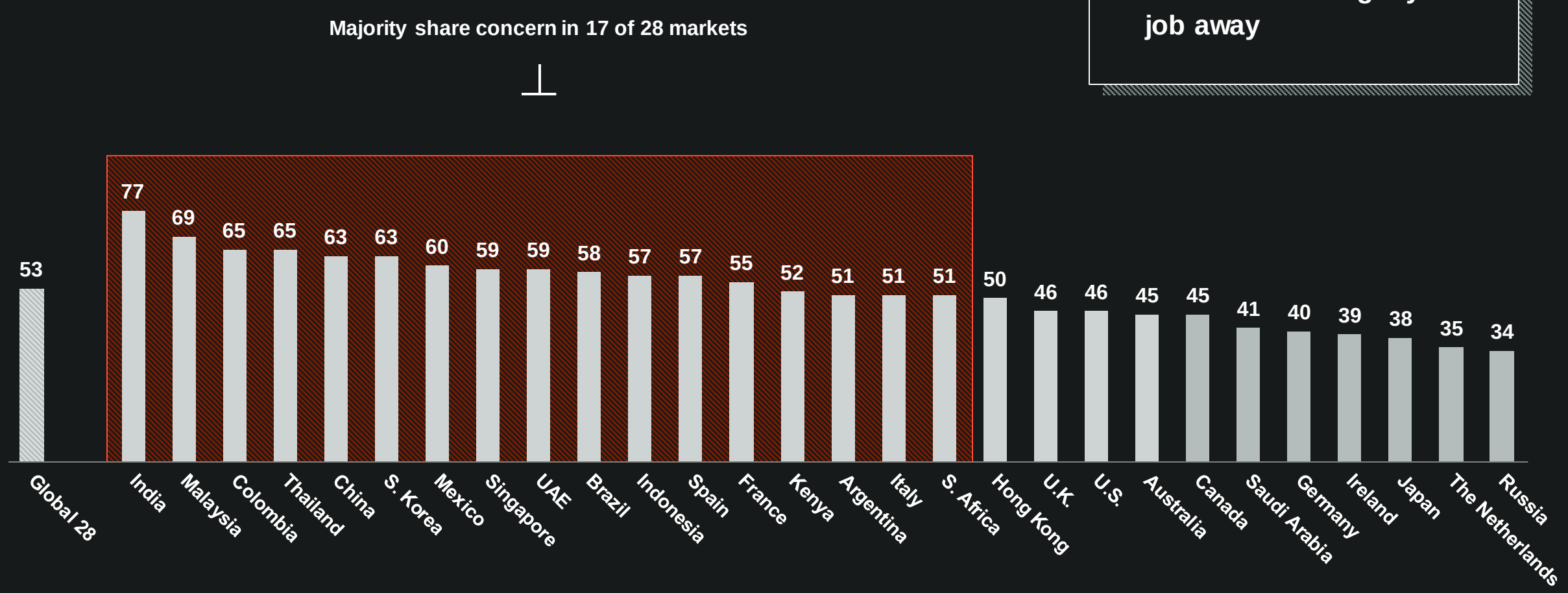


2020 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worried. Job loss net = codes 1,2,3,4,5,23,24. General population, 28-mkt avg, among those who are employed (Q43/1).

OVER 1 IN 2 WORRY ABOUT JOB LOSS DUE TO AUTOMATION

Percent who are worried

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



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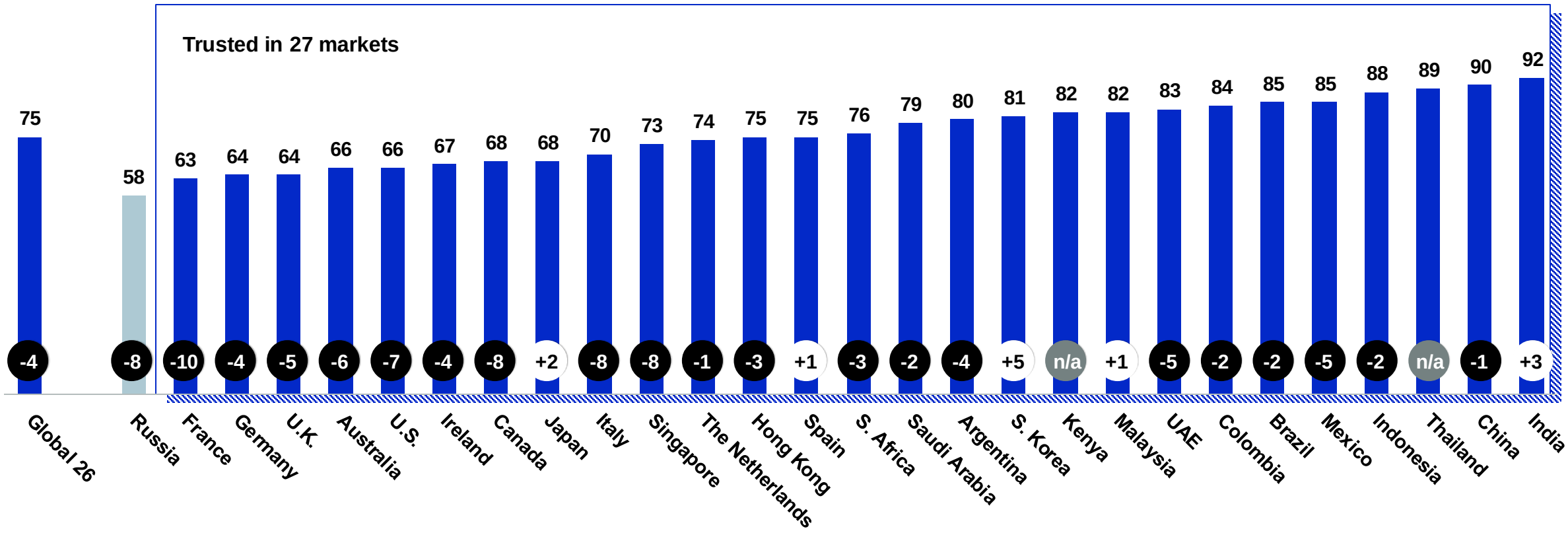
TECHNOLOGY LOSING ITS TRUST ADVANTAGE

TRUST IN TECHNOLOGY DECLINES IN 21 OF 26 MARKETS

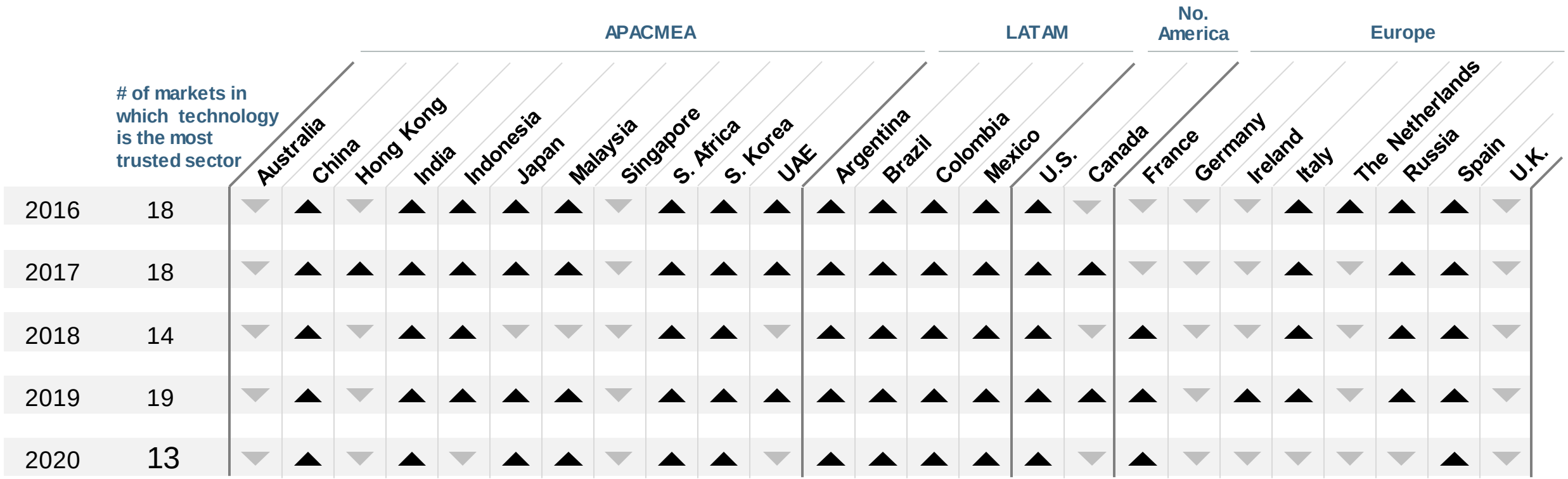
Percent trust in technology



2020 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-mkt avg.

TECHNOLOGY NO LONGER MOST TRUSTED SECTOR IN RECORD NUMBER OF MARKETS

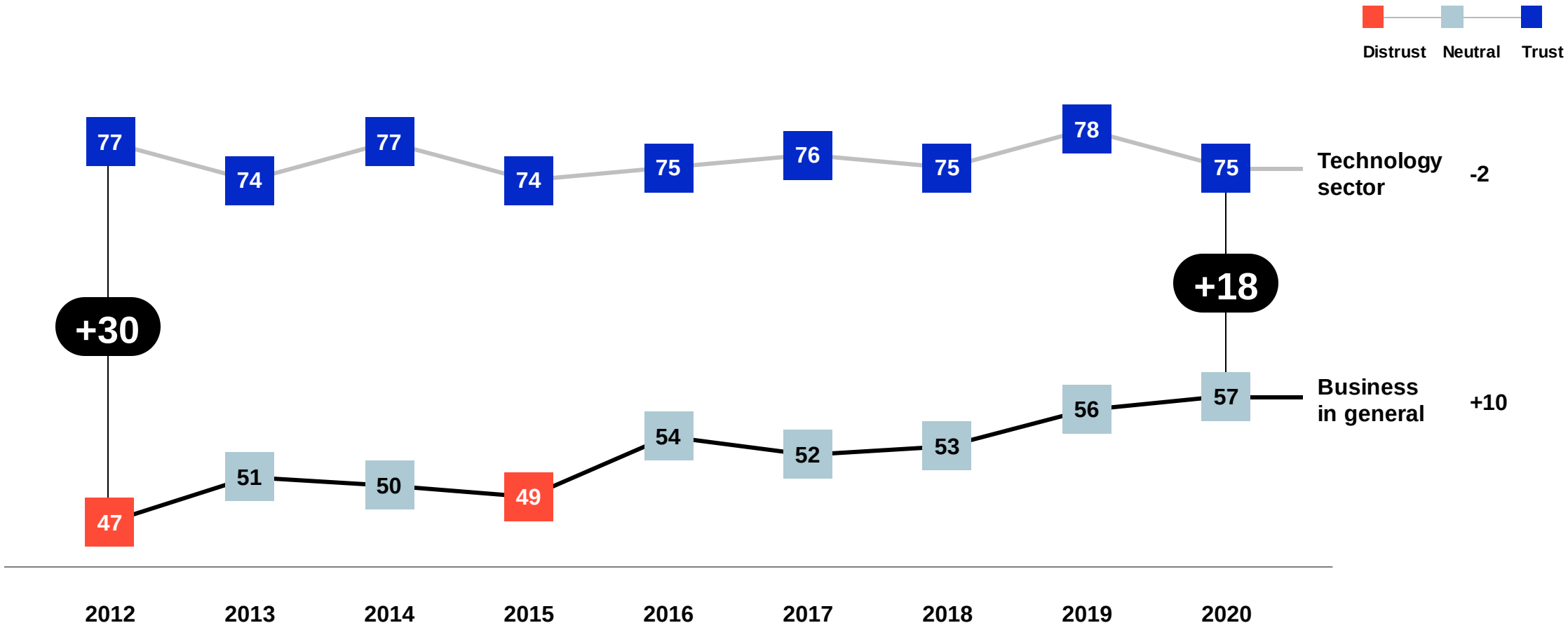
Markets in which technology is the most trusted sector measured



2020 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 25-mkt avg.

TECHNOLOGY SECTOR TRUST NOT KEEPING PACE

Percent trust in technology and business, change from 2012 to 2020

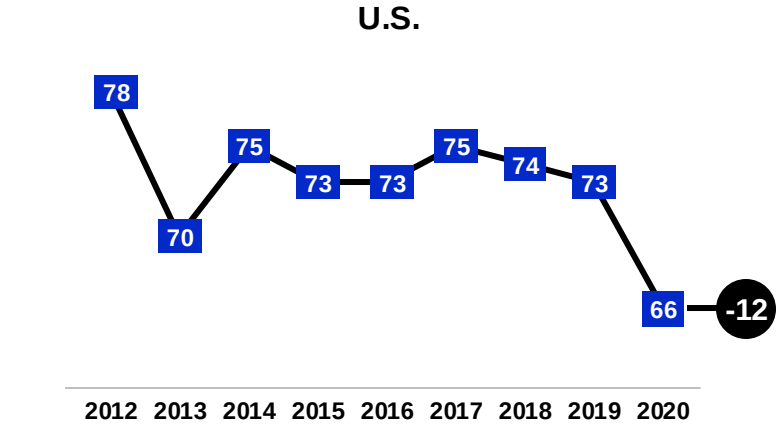


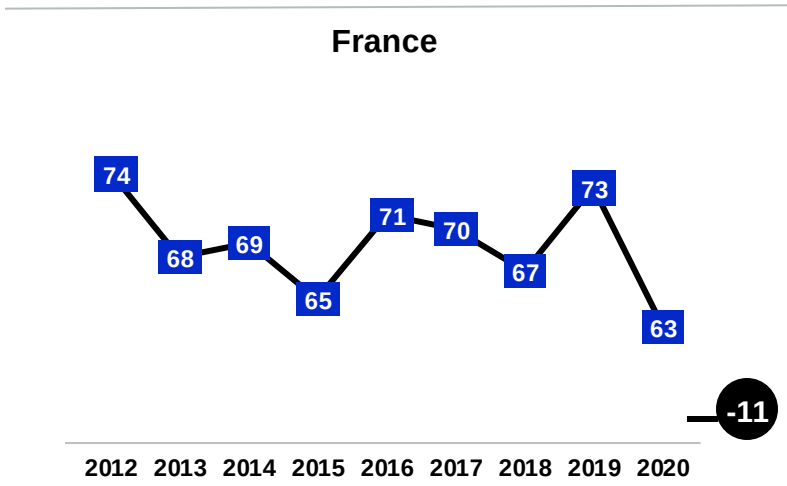
2020 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 23-mkt avg.

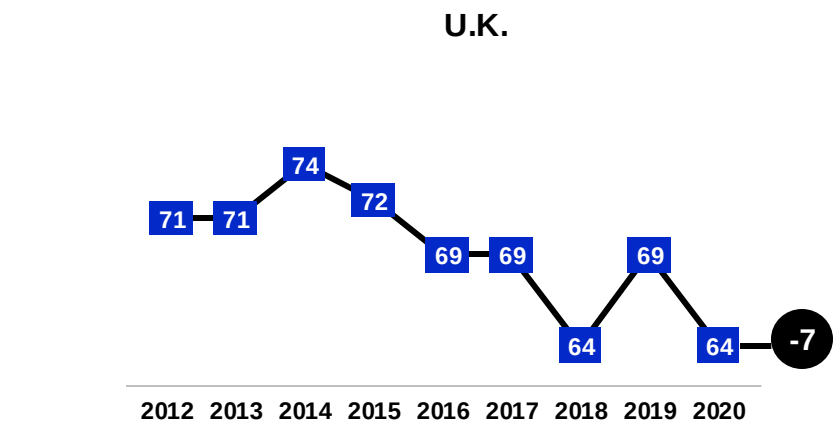
SHARP DECLINES IN KEY MARKETS FOLLOWING YEARS OF ERODING TRUST

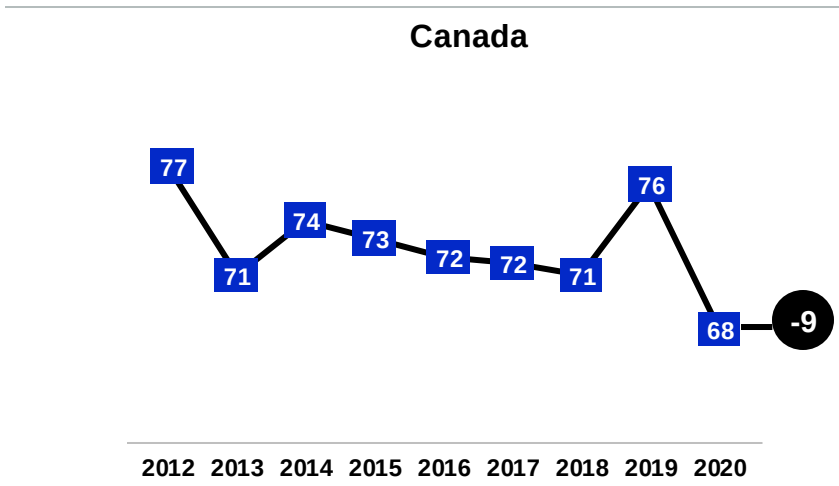
Percent trust in technology, 2012 to 2020

Largest declines since 2019:	
France	-10
Canada, Italy, Russia, Singapore	-8
U.S.	-7
Australia	-6





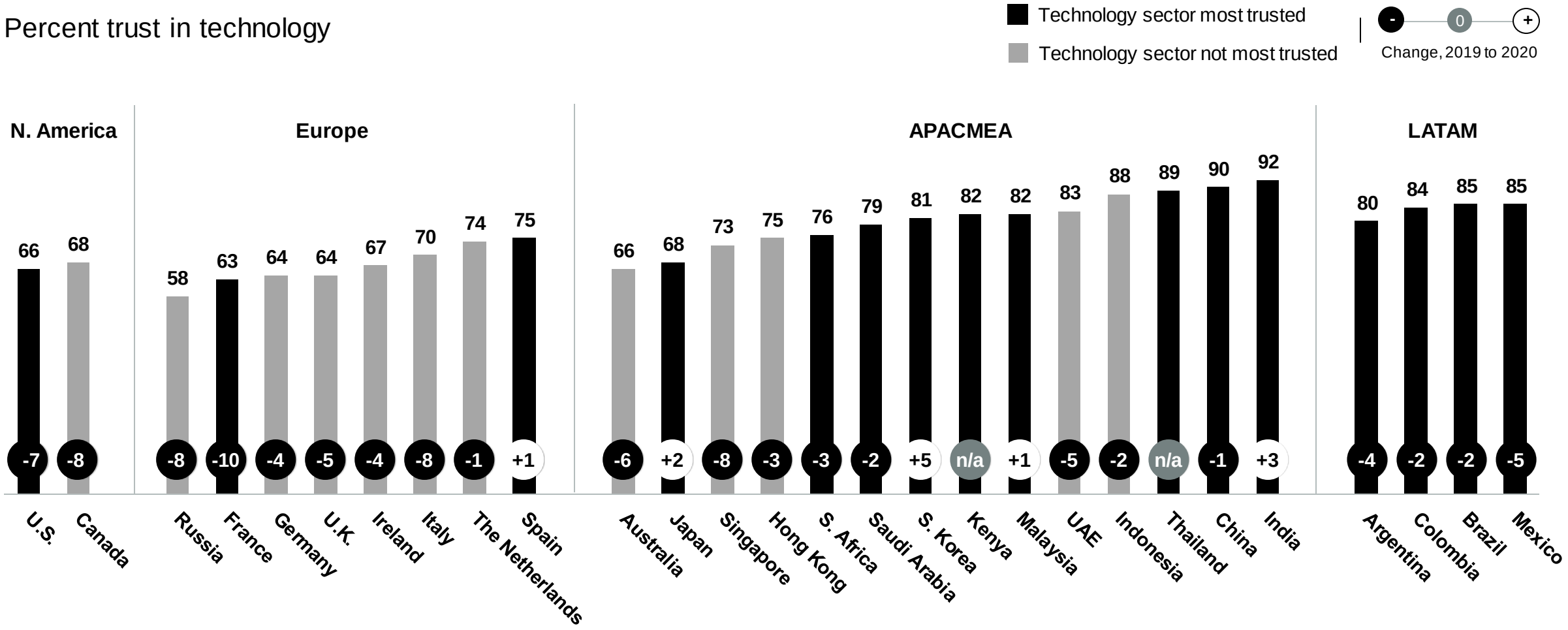




2020 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, U.S., U.K., France and Canada.

TECH NO LONGER MOST TRUSTED SECTOR IN EUROPE AND CANADA

Percent trust in technology



2020 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-mkt avg.

TRUST IN INNOVATIONS LAGS TRUST IN SECTORS

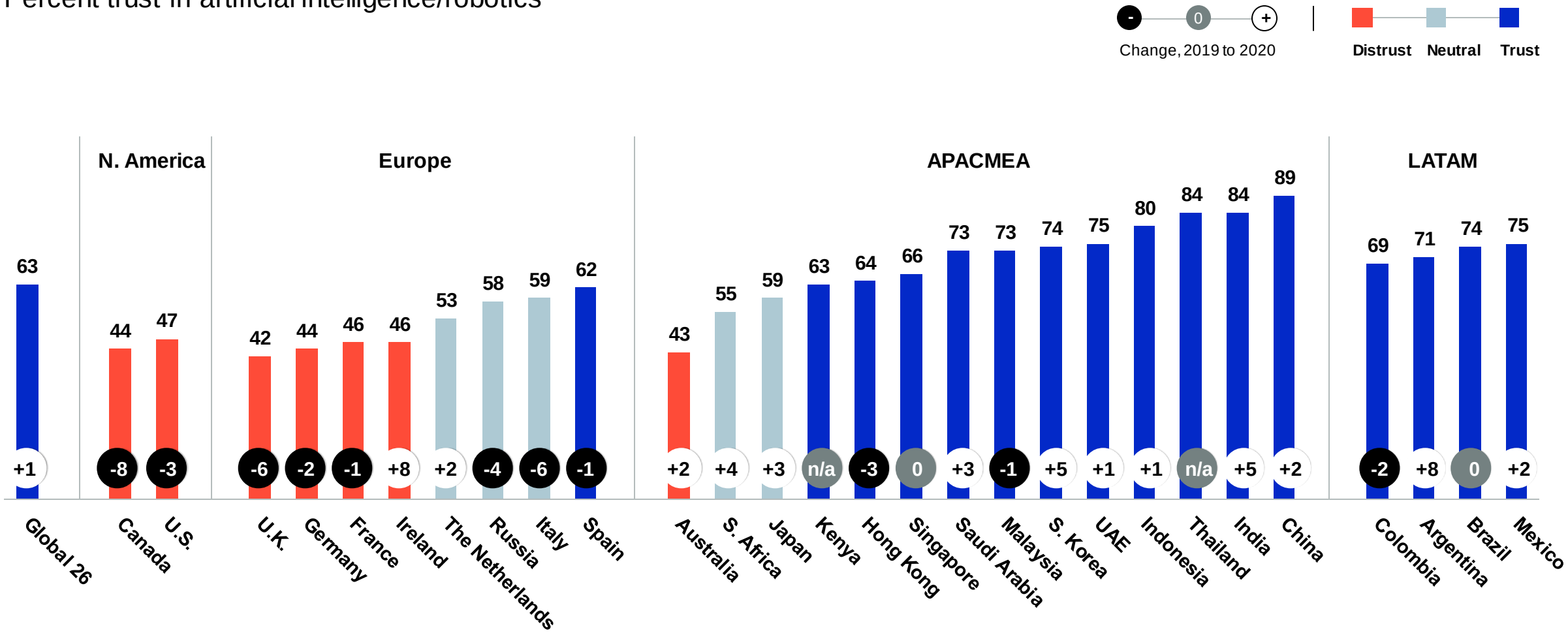
Percent trust

	Food & Beverage	Technology	Automotive	Financial Services	Healthcare
67 AVG TRUST — **Sector trust** — Four of five sectors trusted	68	76	68	58	67
Trust gap, sector vs. sector innovation	20	13	10	9	3
56 AVG TRUST — **Trust in sector innovation** — Two of five emerging technologies trusted	48	63	58	49	64
	Cell-cultured meats/ gene editing	Artificial intelligence/ robotics	Driverless cars	Cryptocurrency/ blockchain	Personalized medicines/ gene mapping

2020 Edelman Trust Barometer. SEC_TEC. Now thinking about the specific subsectors below, please indicate how much you trust businesses in each of the following to do what is right. 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. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 28-mkt avg.

AI DISTRUSTED IN KEY MARKETS

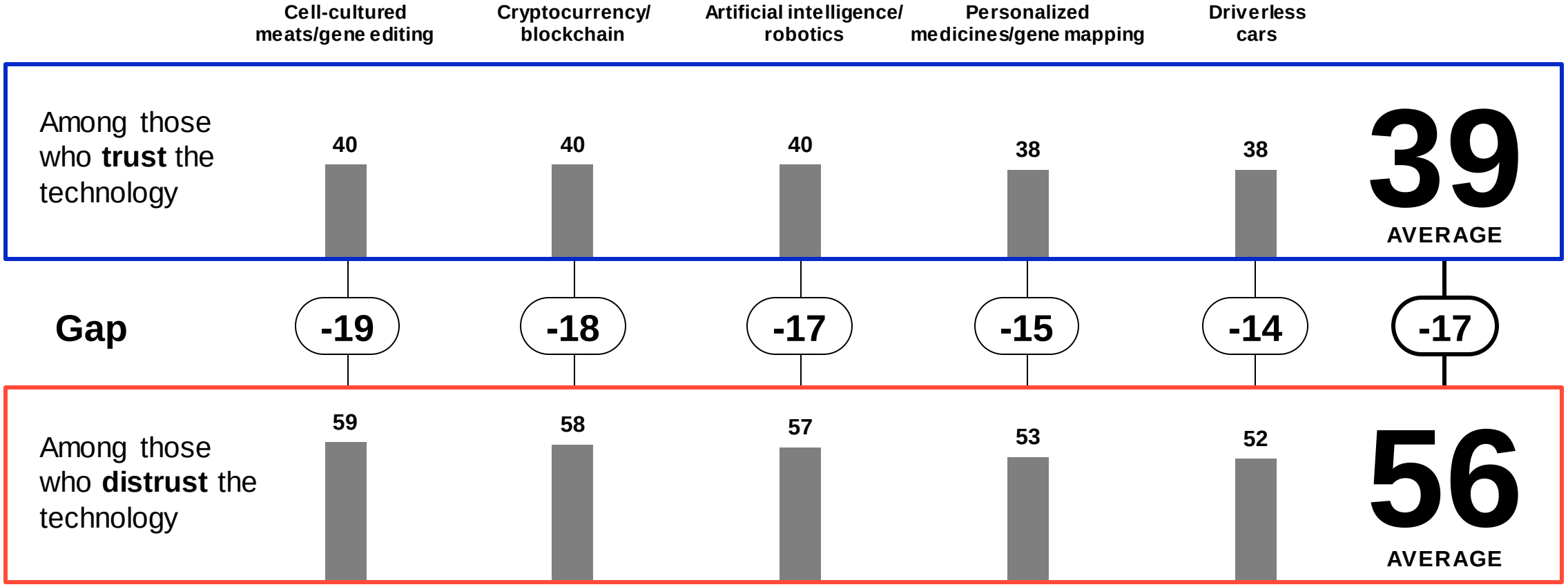
Percent trust in artificial intelligence/robotics



2020 Edelman Trust Barometer. SEC_TEC. Now thinking about the specific subsectors below, please indicate how much you trust businesses in each of the following to do what is right. 9-point scale; top 4 box, trust. General population, 26-mkt avg.

HIGHER CALL FOR REGULATION WHEN INNOVATIONS ARE DISTRUSTED

Percent who think the emerging technologies are not regulated enough

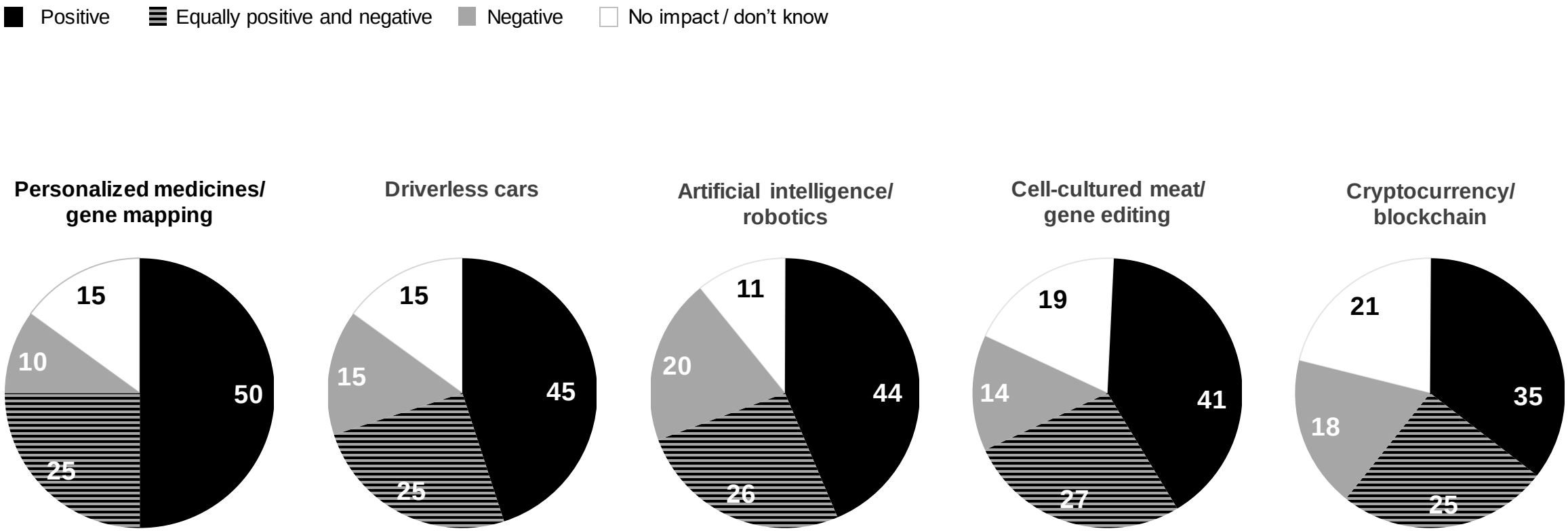


2020 Edelman Trust Barometer. ET_XXX_REG. When it comes to regulation of these new AI technologies, do you think they are regulated too much, not enough orthe right amount? (Please select one response.) SEC_TEC. Now thinking about the specific subsectors below, please indicate how much you trust businesses in each of the following to do what is right. 9-point scale; top 4 box, trust, bottom 4 box, distrust. Questions asked to two-fifths of the sample. General population, 28-market average. .

BUILDING TRUST IN EMERGING TECHNOLOGIES

MAJORITY UNCONVINCED OF POSITIVE IMPACT

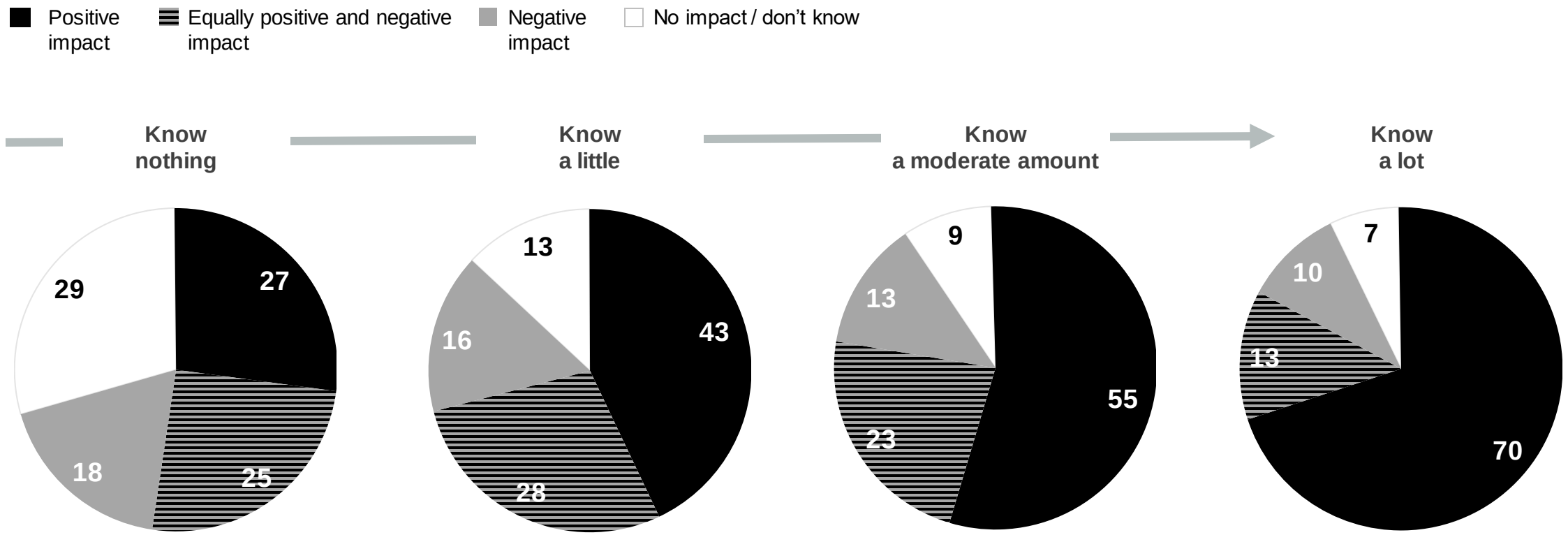
Percent who feel emerging technologies will have a positive or negative impact



2020 Edelman Trust Barometer. ET_XX_IMP. For each of the following areas please indicate what you think the impact of [insert technology] will be using thefollowing scale. 5-point scale; codes 88 and 99, no impact/don't know. Question asked to two-fifths of the sample. General population, 28-mkt avg. Scores are averages of all 5 attributes.

THE MORE INFORMED, THE MORE CONVINCED OF POSITIVE IMPACT

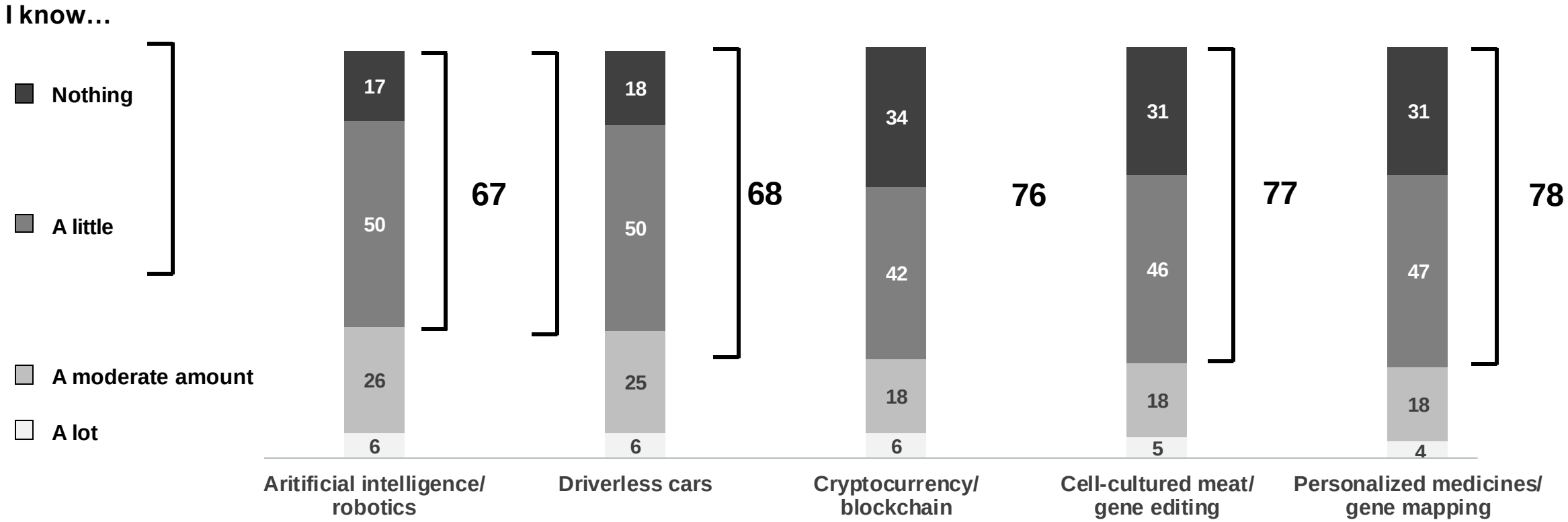
Percent who feel emerging technologies will have a positive or negative impact, among respondents with varying degrees of knowledge



2020 Edelman Trust Barometer. ET_[TEC]_INF. How well informed are you about [insert technologies]? Question asked of two-fifths of the sample. ET_[TEC]_IMP. For each of the following areas please indicate what you think the impact of [insert technologies] will be using the following scale. 5-point scale; top 2 box, positive; bottom 2 box, negative; code 3 equally positive and negative; codes 88 and 99, no impact/don't know. Question asked of two-fifths of the sample. Data is the average impact for all attributes across all five emerging technologies by degree of knowledge. General population, 28-mkt avg.

SIGNIFICANT KNOWLEDGE GAP ACROSS INNOVATIONS

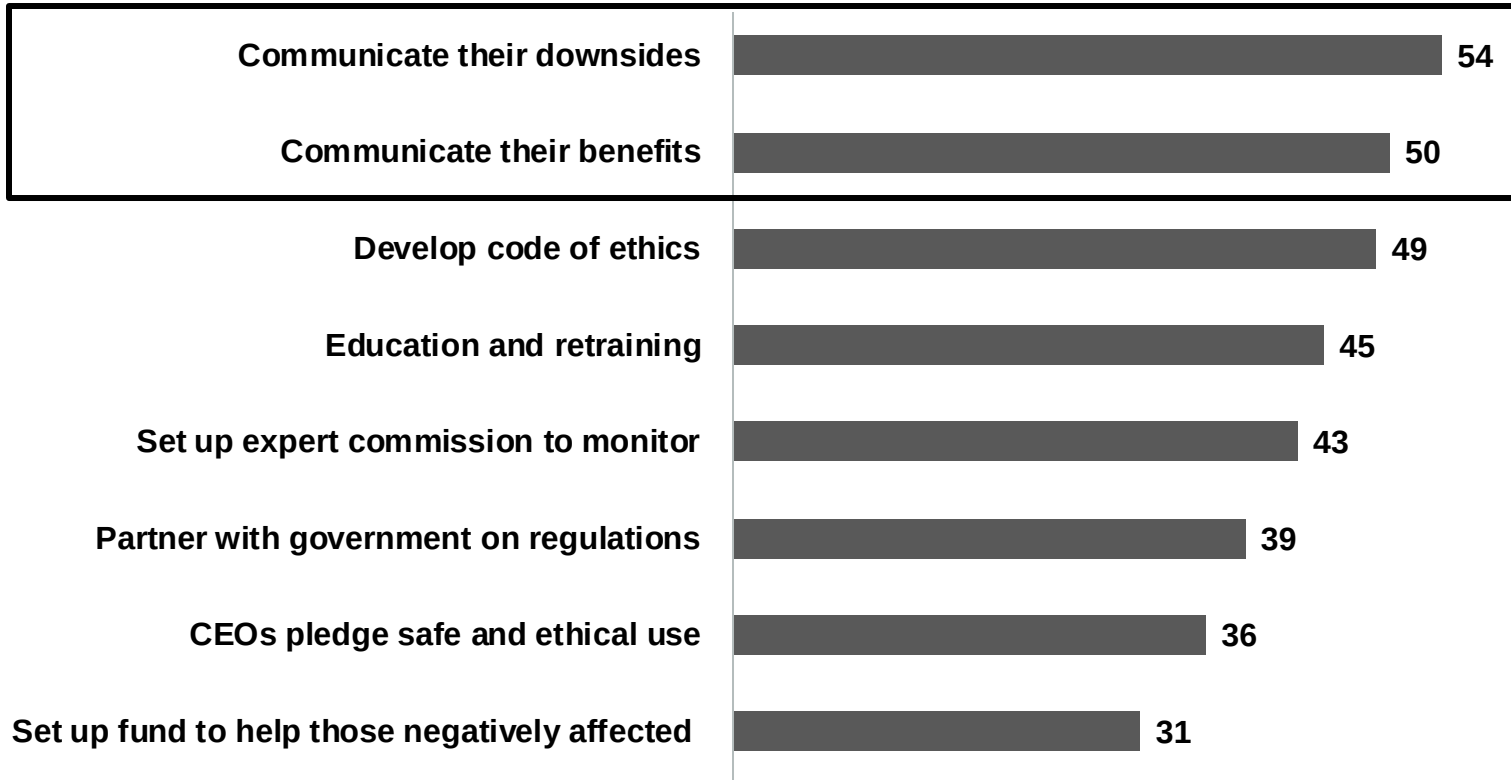
Percent who say they know nothing, a little bit, a moderate amount, or a lot about the emerging technologies



2020 Edelman Trust Barometer. ET_XXX_INF. How well informed are you about [insert technologies]? Question asked of two-fifths of the sample. General population, 28-mkt avg.

ADDRESS THE KNOWLEDGE GAP TO IMPROVE TRUST IN INNOVATIONS

Percent who say the following actions may act to increase trust in emerging technologies

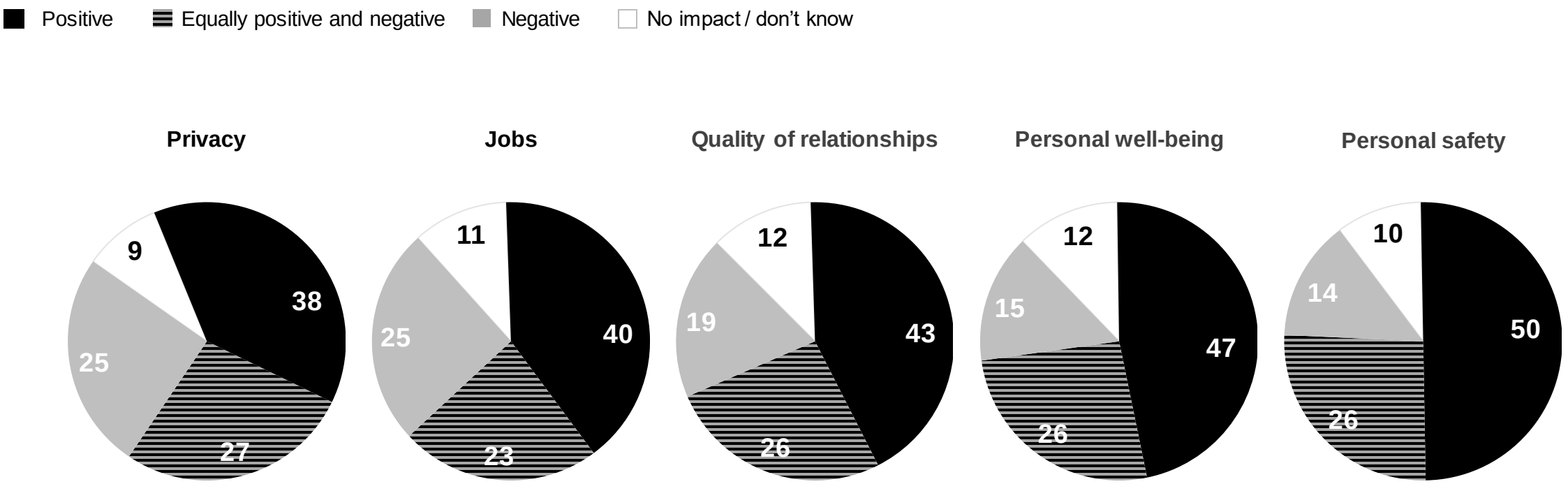


	Artificial Intelligence/ robotics	Driverless cars	Crypto-currency/ blockchain	Cell-cultured meats/ gene editing	Personalized medicines/ gene mapping
Communicate their downsides	57	57	47	55	55
Communicate their benefits	52	49	46	51	54
Develop code of ethics	53	47	43	50	51
Education and retraining	51	46	41	43	46
Set up expert commission to monitor	43	43	37	44	46
Partner with government on regulations	38	41	35	40	42
CEOs pledge safe and ethical use	38	38	34	36	36
Set up fund to help those negatively affected	33	30	28	30	34

2020 Edelman Trust Barometer. ET_[TEC]_TRU. What can [insert technologies] companies do to increase your trust in these technologies? Question asked of two-fifths of the sample. Data on the left is the average across all five technologies. General population, 28-mkt avg.

ADDRESS CONCERNS ABOUT IMPACT OF AI ON JOBS AND PRIVACY

Percent who feel artificial intelligence/robotics will have a positive or negative impact



2020 Edelman Trust Barometer. ET_AI_IMP. For each of the following areas please indicate what you think the impact of AI will be using the following scale.5-point scale; top 2 box, positive; bottom 2 box, negative; code 3 equally positive and negative; codes 88 and 99, no impact/don't know. Question asked of two-fifths of the sample. General population, 28-mkt avg.

TECHNOLOGY: CATALYST FOR POSITIVE CHANGE

SERVE THE INTERESTS OF ALL STAKEHOLDERS

Percent who ranked each group as most important

87%

Stakeholders, not shareholders, are most important to long-term company success

Percent who agree

73%

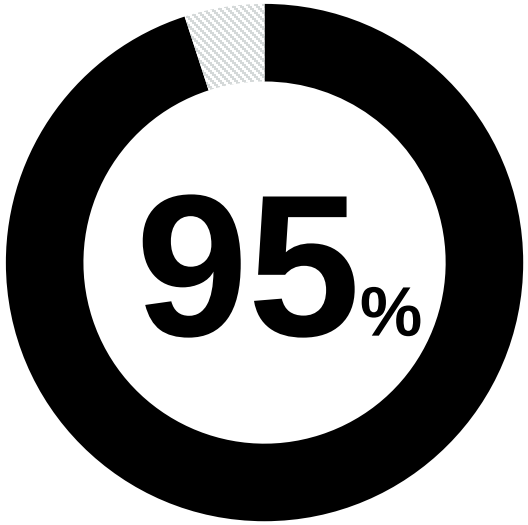
a company can take actions that both increase profits and improve conditions in communities where it operates

2020 Edelman Trust Barometer. PPL_RNK. Please rank the following four groups of people in terms of their importance to a company achieving long-term success. Give the most important group a rank of 1 and the least important a rank of 4. Stakeholders is a net of "Communities," "Customers," and "Employees". 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 of the sample. General population, 28-mkt avg.

CEOS MUST LEAD

Percent of tech employees who agree

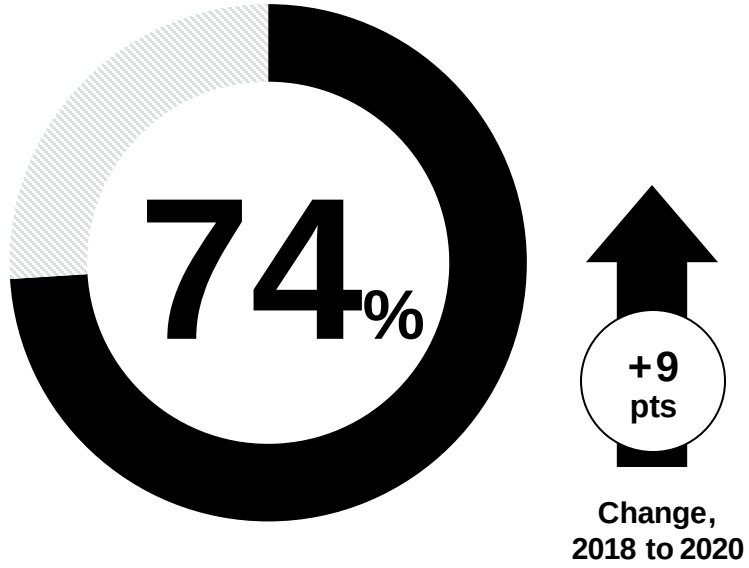
It is important that **my employer's CEO speak out** on one or more of these issues



	Tech employees	All employees
Training for jobs of the future	86	84
Automation's impact on jobs	87	81
Ethical use of tech	85	81
Income inequality	83	78
Diversity	80	77
Climate change	78	73
Immigration	70	62

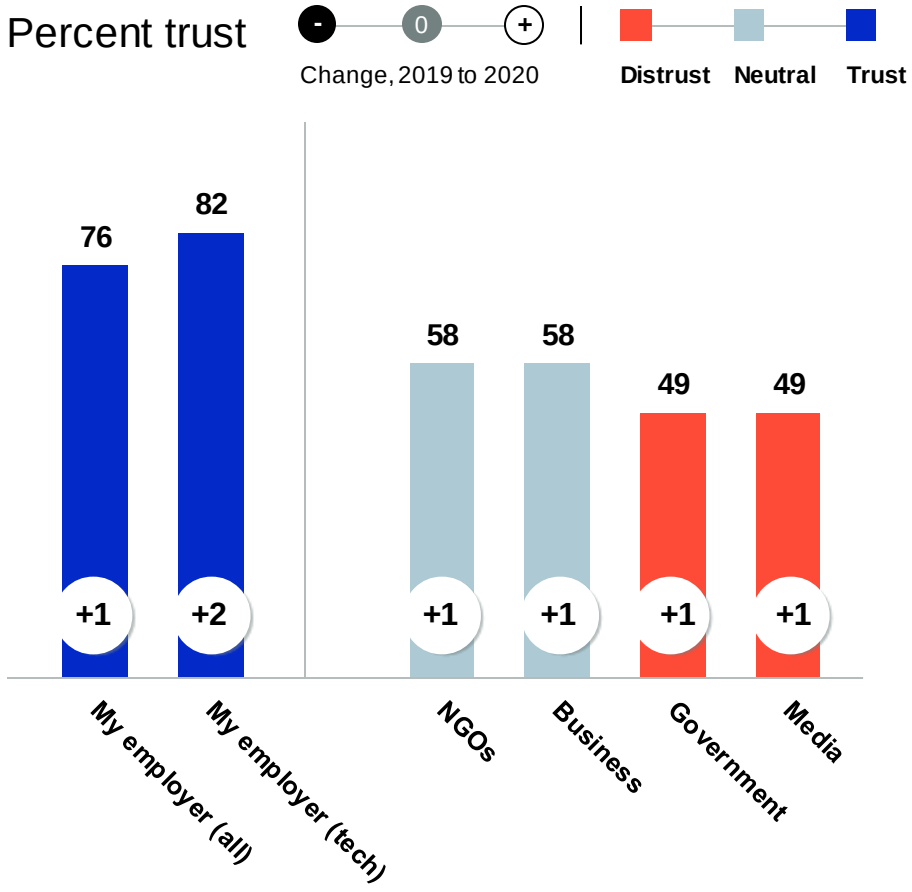
Percent who agree

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



2020 Edelman Trust Barometer. CEO_ISS. How important is it to you that the CEO or head of the organization you work for speaks out publicly about each of the following issues? 9-point scale; top 4 box, important. Question asked of those who are an employee (Q43/1). Issues is a net of codes 1-7. General population employees and employees in the technology industry, 28-mkt avg. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 25-mkt avg.

TRUST IS LOCAL:
EMPLOYEES EXPECT TO BE HEARD



Percent of employees who expect each from a prospective employer

Technology sector employees

All employees

76%

Opportunity to **shape the future** of society

76%

Employees **included in planning**

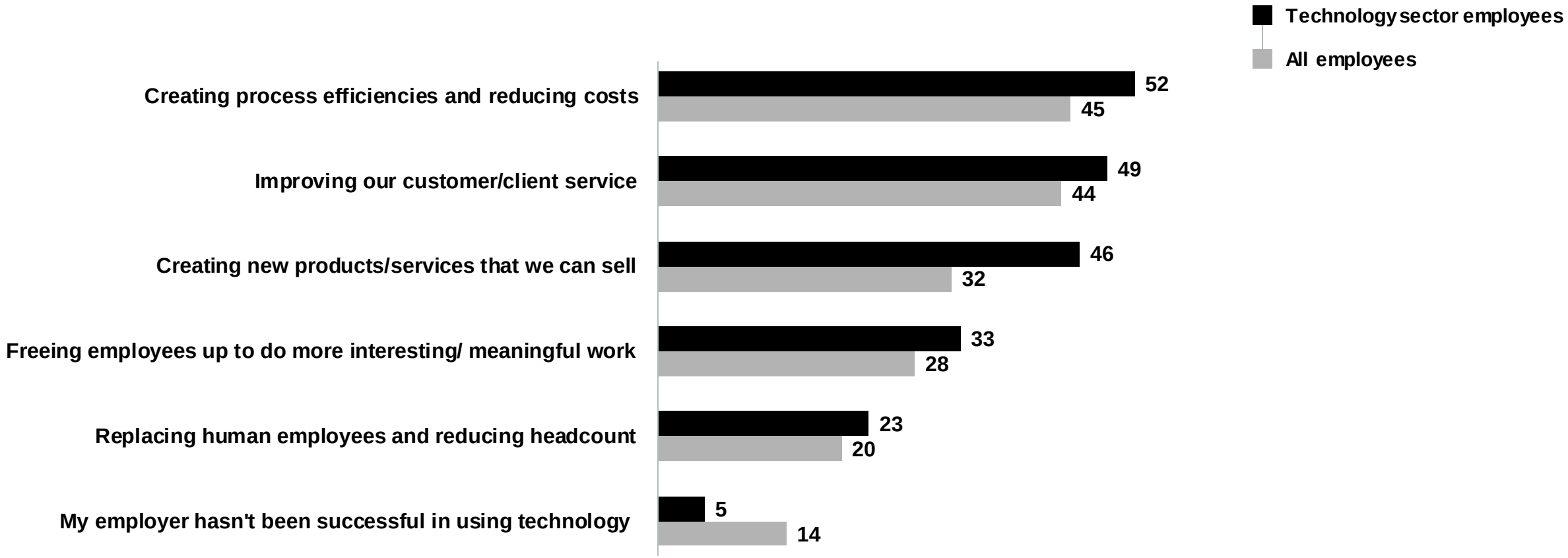
73%

73%

2020 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? 3-point scale; sum of codes 1 and 2, important. Question asked of those who are an employee (Q43/1). TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is. 9-point scale; top 4 box, trust. "Your employer" asked of those who are an employee (Q43/1). General population, 26-mkt avg.

POSITION TECH TO ADD VALUE, NOT JUST CUT COST

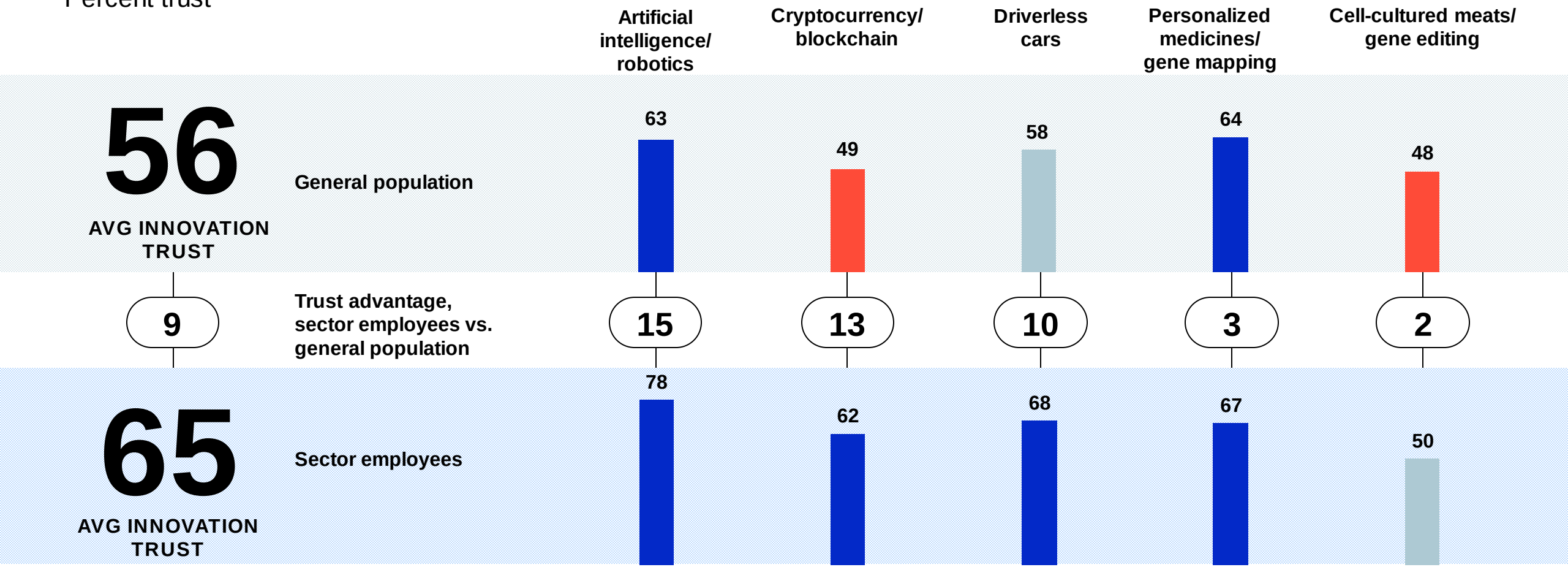
Percent who agree their employer has been successful in its use of technology



2020 Edelman Trust Barometer. SUC_USE_TEC. In which of the following areas has your employer been the most successful in its use of technology? Pick all that apply. Question asked of those who are an employee (Q43/1). General population employees and employees in the technology industry, 28-mkt avg.

LEVERAGE HIGHER TRUST AMONG EMPLOYEES TO BUILD TRUST IN INNOVATION

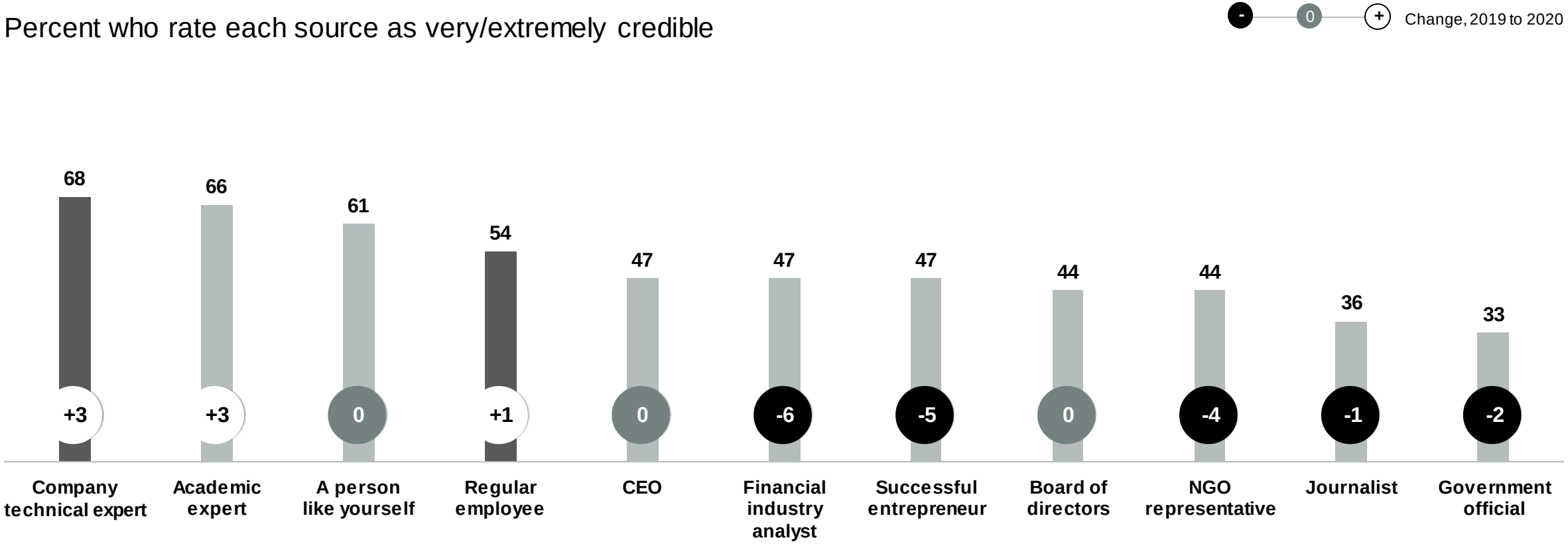
Percent trust



2020 Edelman Trust Barometer. SEC_TEC. Now thinking about the specific subsectors below, please indicate how much you trust businesses in each of the following to do what is right. 9-point scale; top 4 box, trust. Q420. Which of the following industries best describes the company or organization you work for or the type of work you do? *(Please select one response.)* General population and Sector Employees, 28-market average.

USE CREDIBLE EMPLOYEE VOICES AS SPOKESPEOPLE

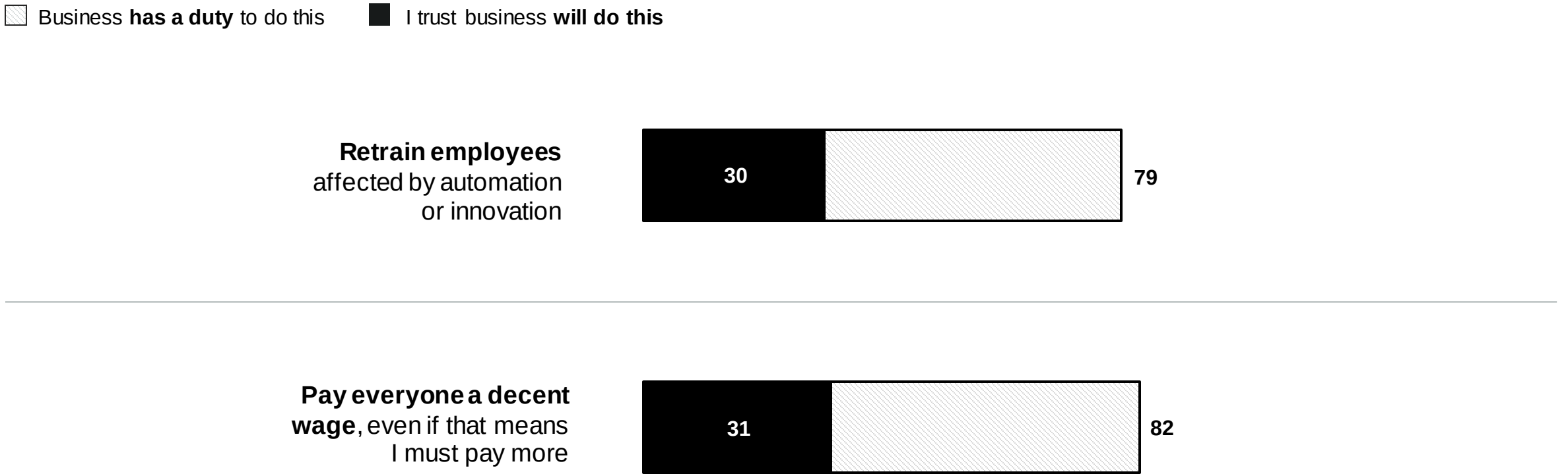
Percent who rate each source as very/extremely credible



2020 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. Spokespeople asked of half of the sample. General population, 26-mkt avg.

TAKE ACTION TO ADDRESS IMPACT OF AUTOMATION

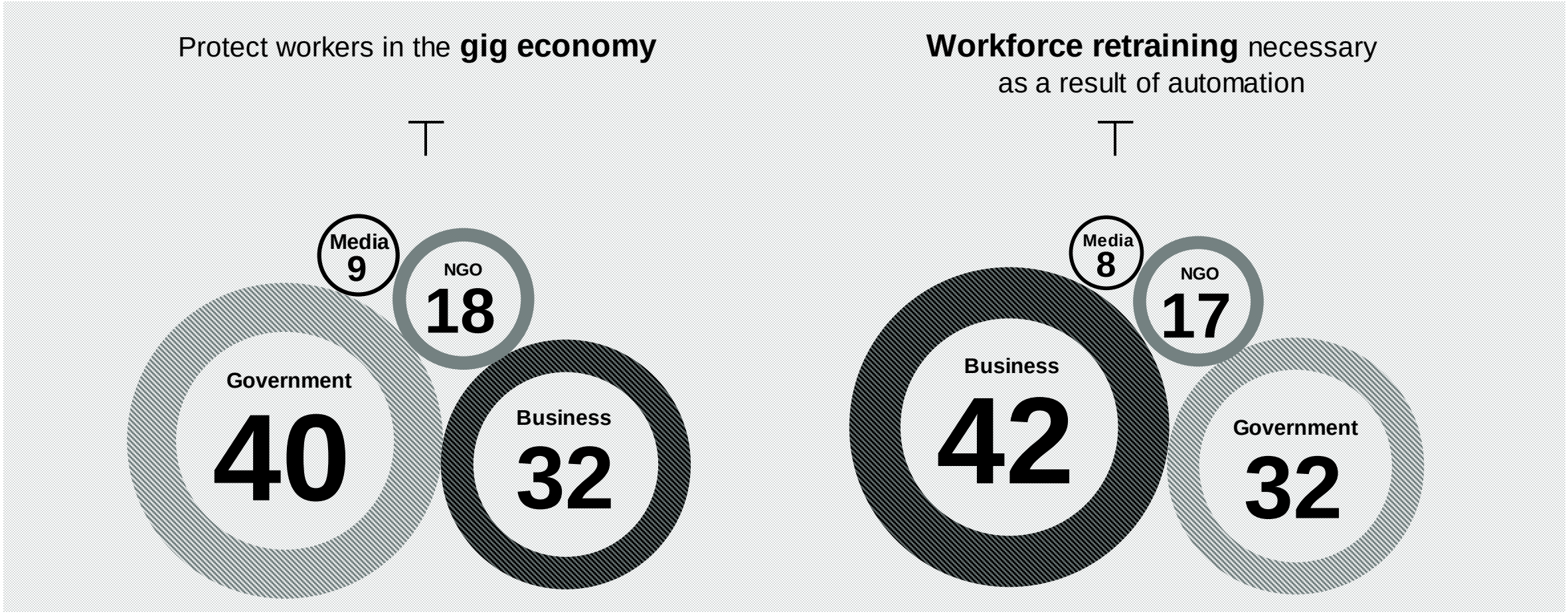
Percent who agree



2020 Edelman Trust Barometer. CMP_DUT. For each of the actions below, please indicate whether you believe that this is something that companies have a dutyto do, but you do/do not trust that they will ever follow through and consistentlydo it. 3-point scale; sum of codes 2 and 3, have a duty; code 3, have a duty and are trusted. General population, 28-mkt avg.

PARTNERSHIP BETWEEN BUSINESS AND GOVERNMENT ESSENTIAL ON JOBS AND RETRAINING

Percent who say each institution is the one they trust most to address each challenge



2020 Edelman Trust Barometer. INS_ADD. For each of the challenges described below, please indicate whether you trust business, government, media or NGOs the most to address that challenge and develop workable solutions. Question asked of half of the sample. General population, 28-mkt avg.

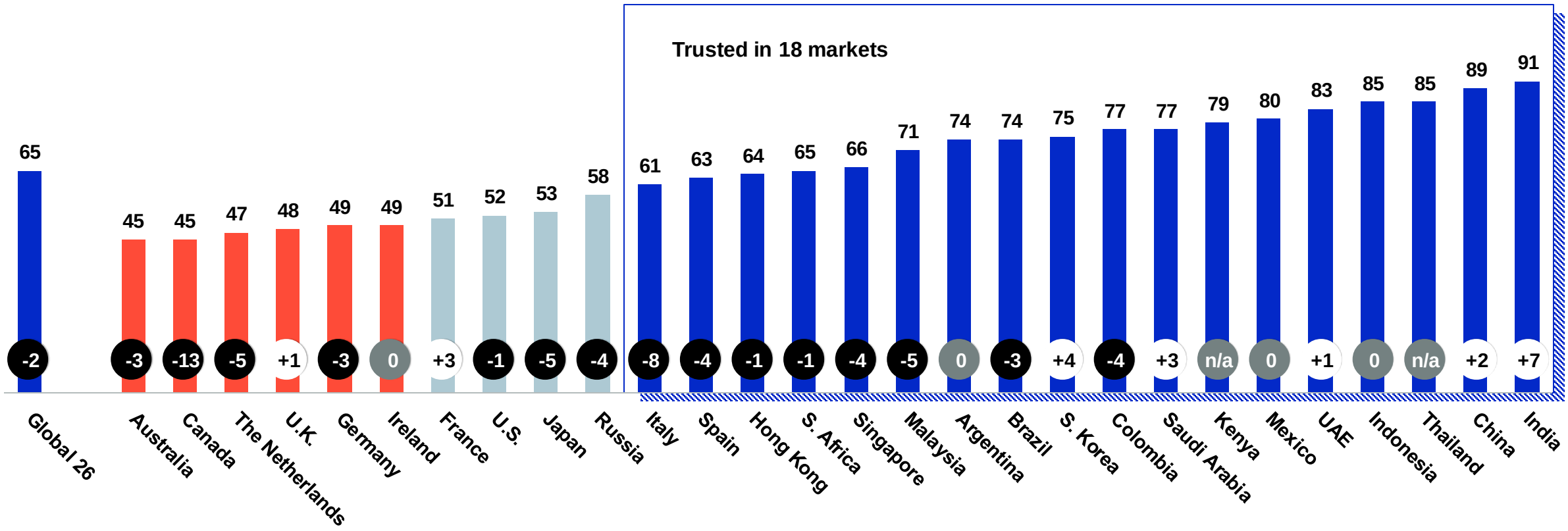
BUILDING TRUST IN TECHNOLOGY FOR THE FUTURE

1. **Address benefits *and* risks of innovation**
2. **Embrace all stakeholders model**
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 INTERNET OF THINGS DECREASED IN 15 OF 26 MARKETS

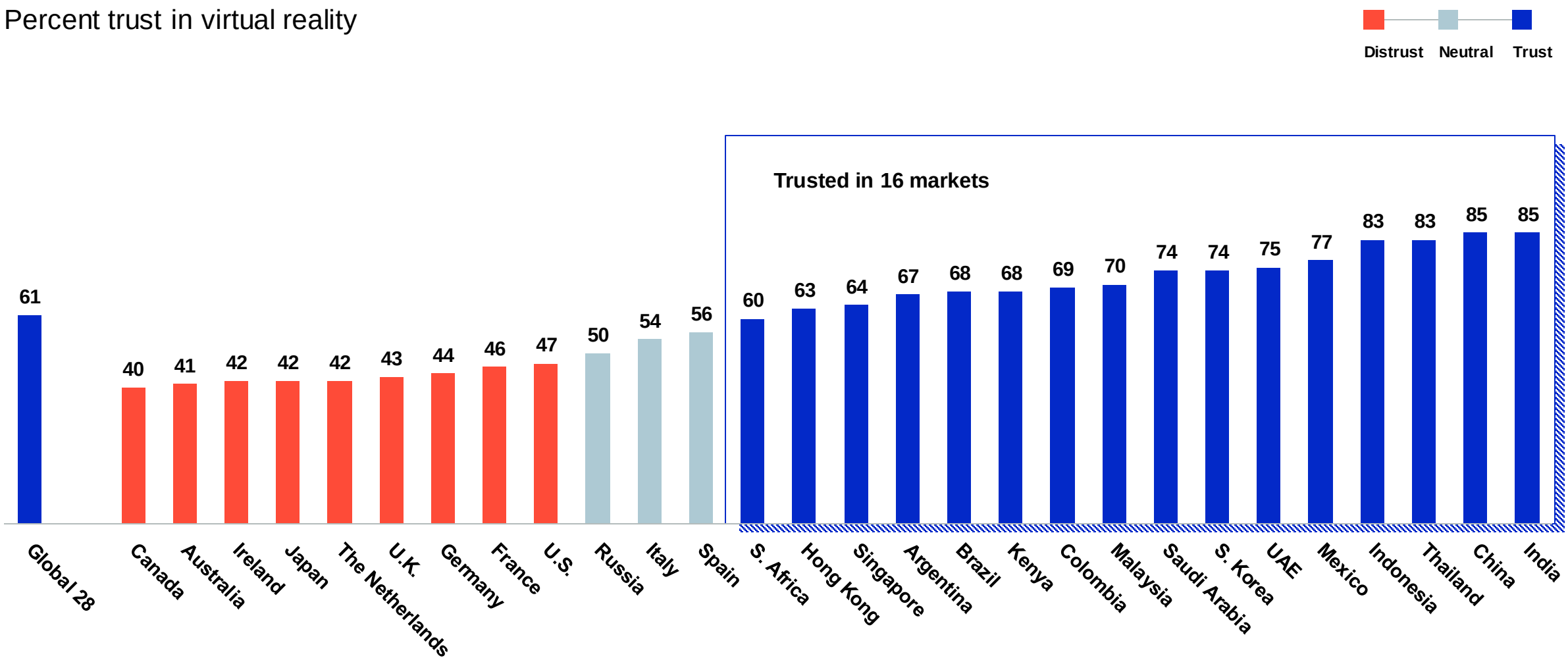
Percent trust in internet of things



2020 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. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-mkt avg.

VIRTUAL REALITY TRUSTED IN 16 MARKETS

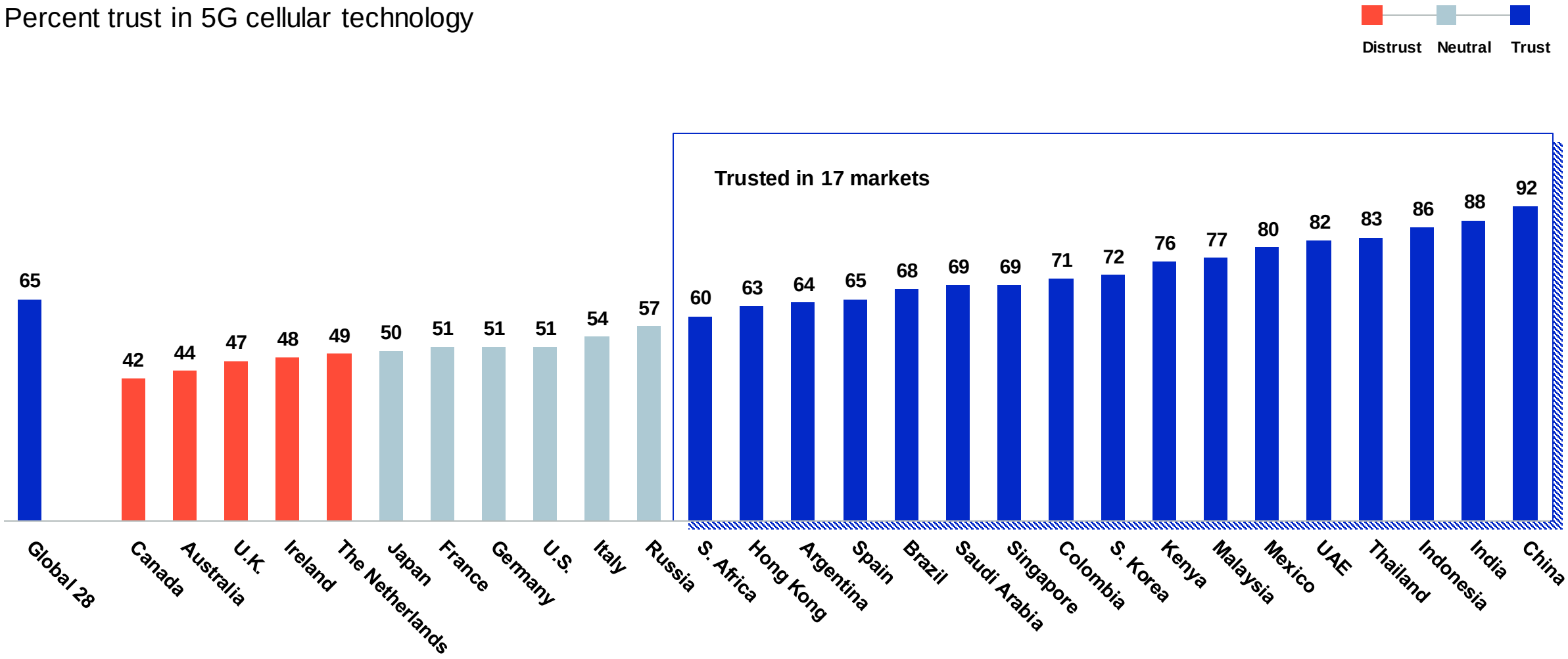
Percent trust in virtual reality



2020 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. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 28-mkt avg.

5G CELLULAR TECHNOLOGY TRUSTED IN 17 MARKETS

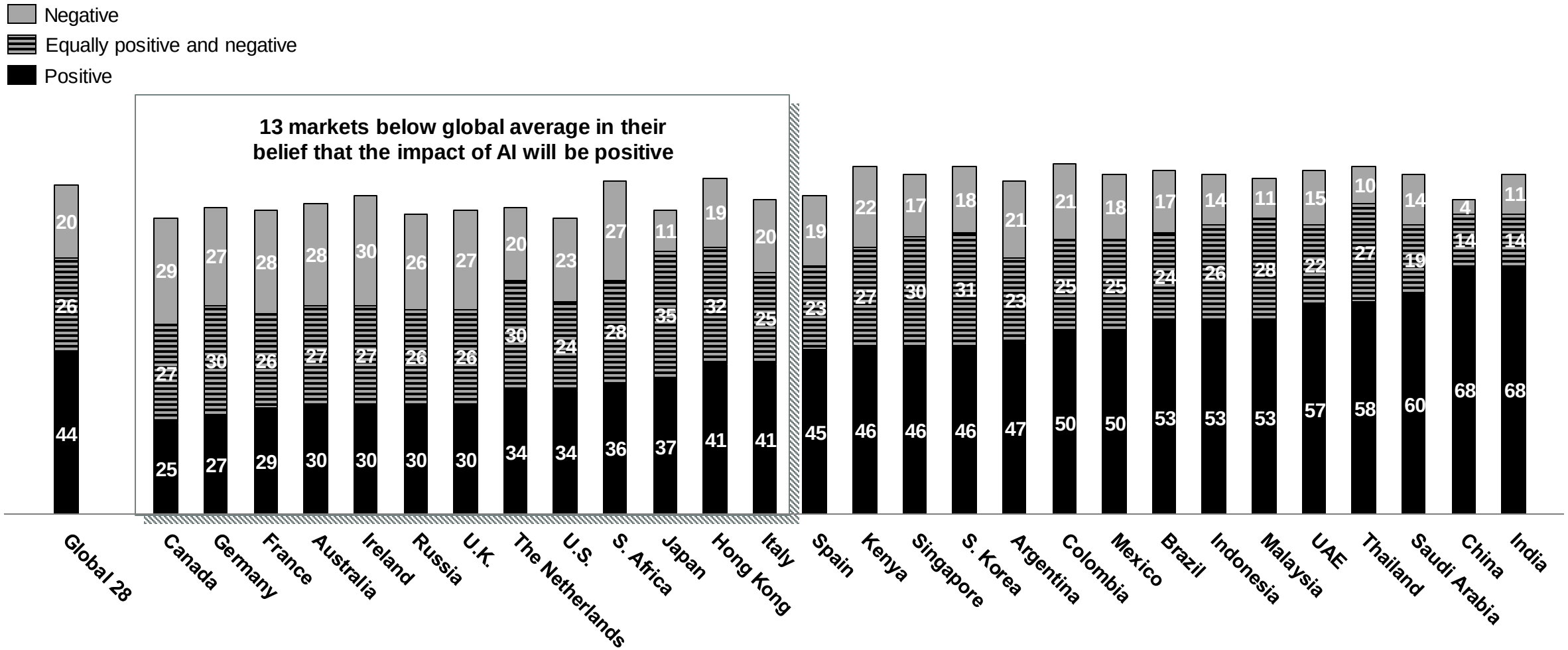
Percent trust in 5G cellular technology



2020 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. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 28-mkt avg.

MAJORITY UNCONVINCED OF POSITIVE IMPACT OF AI

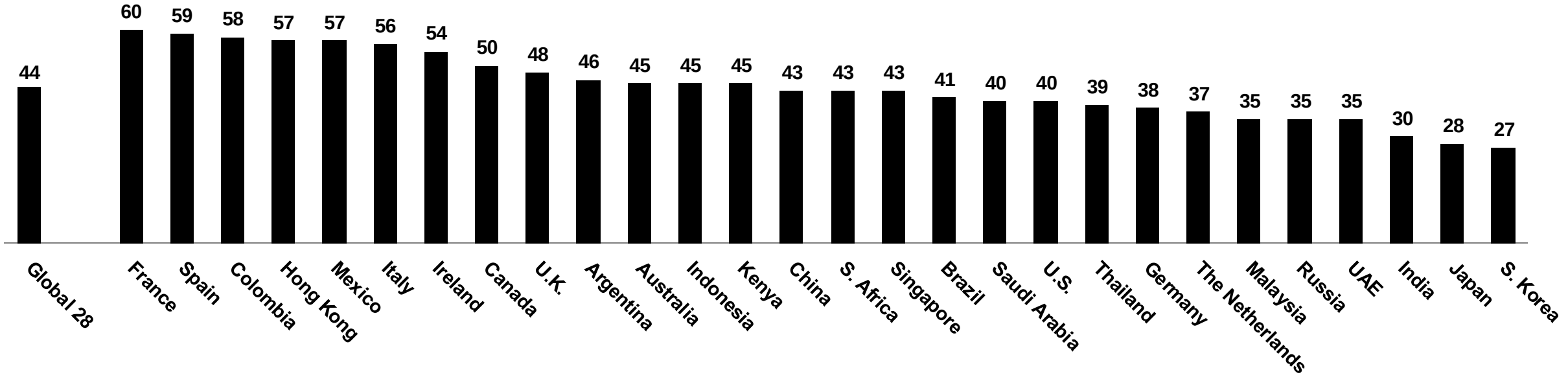
Percent who say the impact of artificial intelligence/robotics will be positive or negative



2020 Edelman Trust Barometer. ET_AI_IMP. For each of the following areas please indicate what you think the impact of AI will be using the following scale.5-point scale; codes 88 and 99, no impact/don't know. Question asked to two-fifths of the sample. General population, 28-market average. Scores are averages of all 5 attributes.

4 IN 10 BELIEVE AI NEEDS MORE REGULATION

Percent who think artificial intelligence/robotics is not regulated enough



2020 Edelman Trust Barometer. ET_AI_REG. When it comes to regulation of these new AI technologies, do you think they are regulated too much, not enough orthe right amount? Not enough. General population, 28-market average.

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