



Edelman Trust Barometer 2021



21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 countries*

33,000+ respondents

2021 Edelman Trust Barometer fieldwork
conducted from October 19 to November 18, 2020

**The 2021 Trust Barometer 27-market global averages (for the general population, mass population and informed public) do not include Nigeria*

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% (N=25,050+); half-sample global general online population +/- 0.8% (N=15,525).

Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).

U.S. Post-Election Supplement ethnicity-specific data margin of error: Non-Hispanic White +/- 3.3% (N=894); all others +/- 4.0 (N=607).

General Online Population

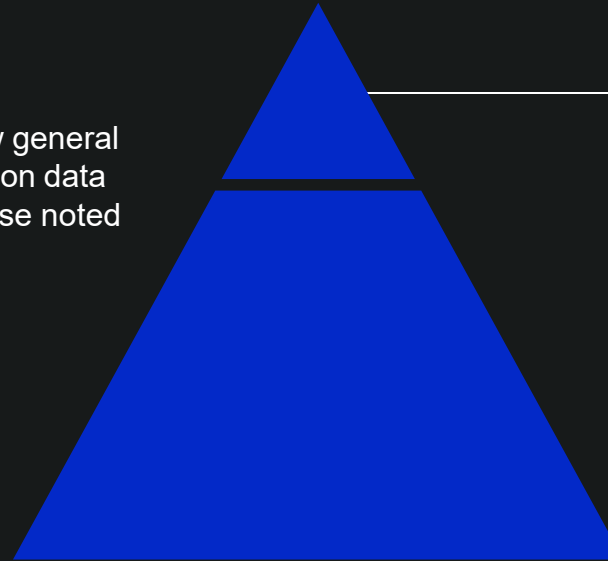
1,150

respondents per country

Ages

18+

All slides show general
online population data
unless otherwise noted



Informed Public

500 respondents in U.S. and China;
100 respondents in Nigeria;
200 in all other countries

Represents **17%** of total global population

Must meet 4 criteria:

- ▶ Age **25-64**
- ▶ College-educated
- ▶ In top **25%** of household income per age group in each country
- ▶ Report significant engagement in public policy and business news

Mass Population

All population not including
informed public

Represents **83%** of total global
population



U.S. Post-Election Supplement

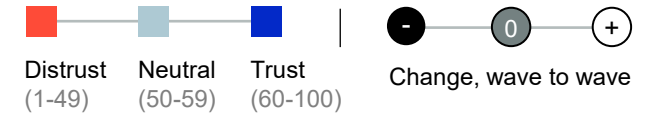
1,500 U.S. respondents, fielded December 14 to 18, 2020

21 YEARS OF TRUST

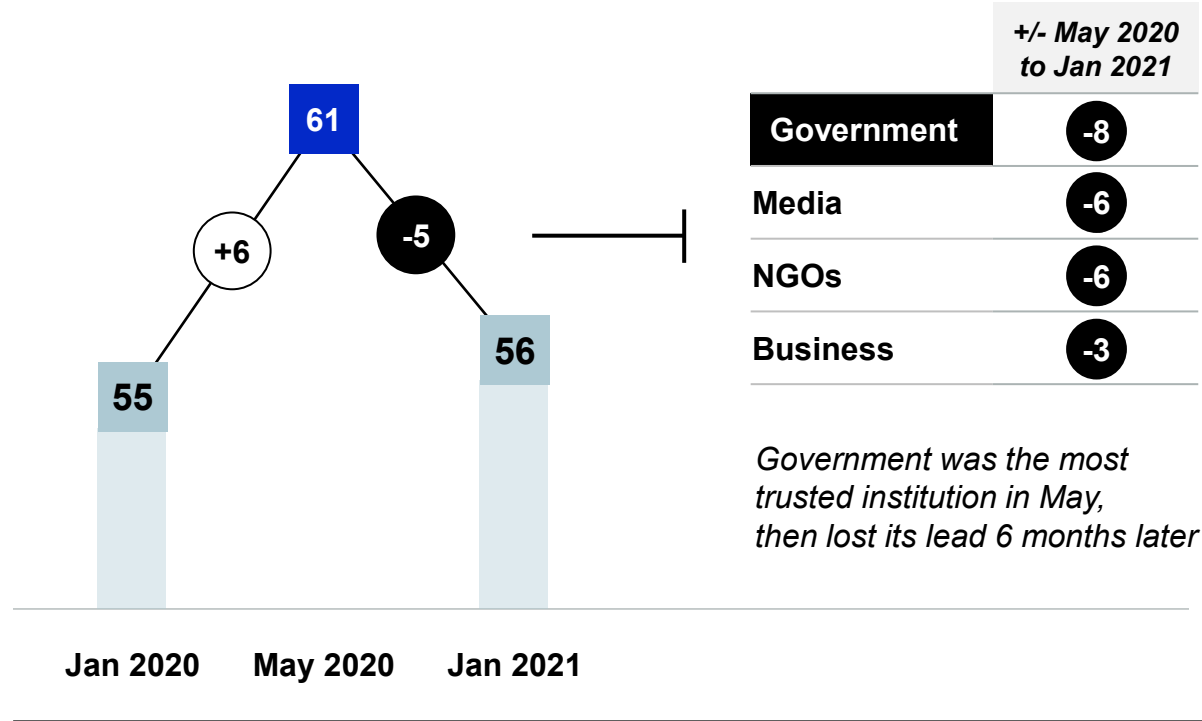
2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummet	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	
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	Declaring Information Bankruptcy	

SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

Trust Index, 11 countries included in the 2020 Trust Barometer Spring Update



Global 11

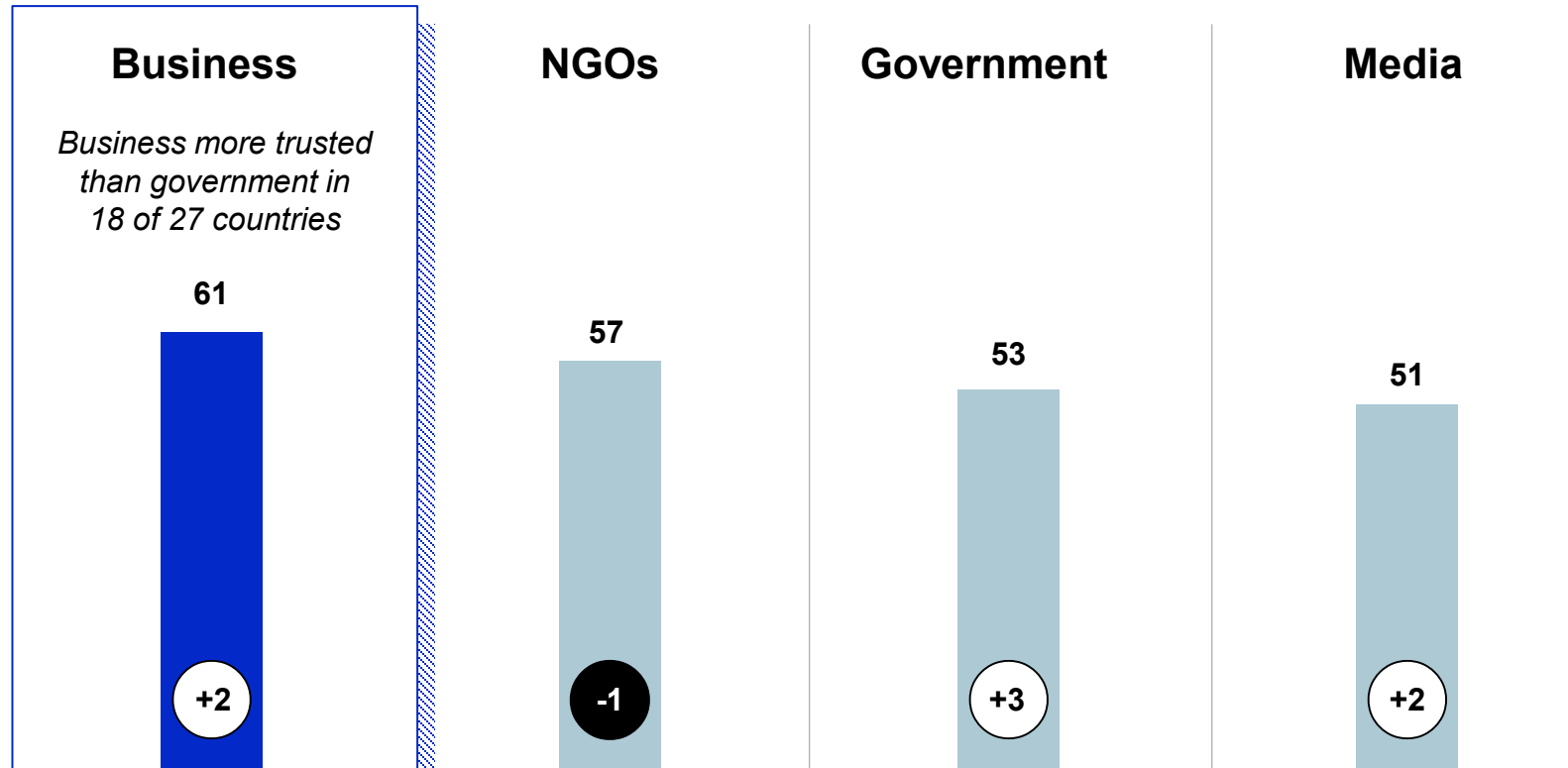
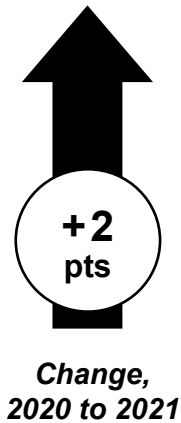


Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

2021 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, 11-mkt avg.

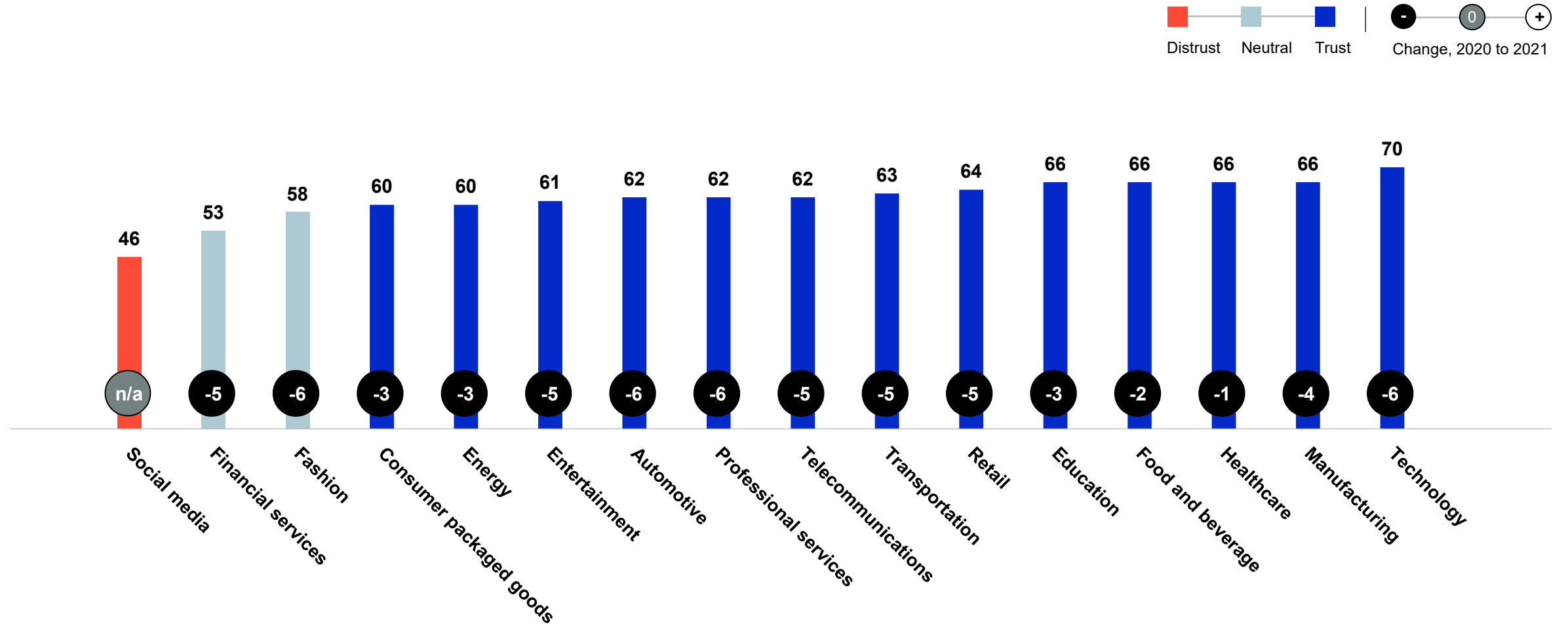
BUSINESS BECOMES ONLY TRUSTED INSTITUTION

Percent trust



TRUST IN TECHNOLOGY DECLINES

Percent trust in each sector



2021 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, 27-mkt avg.

WHY? OUR RELATIONSHIP WITH TECHNOLOGY IS COMPLICATED

Tech's union push
AXIOS

Dealing With Bias in Artificial Intelligence
The New York Times

To Increase Diversity, U.S. Tech Companies Need to Follow the Talent
Harvard Business Review

How AI Can Help Save Forests
THE WALL STREET JOURNAL.

Tech giants struggle to stem 'infodemic' of false coronavirus
The Guardian

The 'Hybrid' Skills That Tomorrow's Jobs Will Require
THE WALL STREET JOURNAL.

How Tech Companies Can Help Promote Digital Inclusion In 2021
Forbes

Tech heats up climate race
FINANCIAL TIMES

How Big Tech failed to stop misinformation in 2020
Mashable

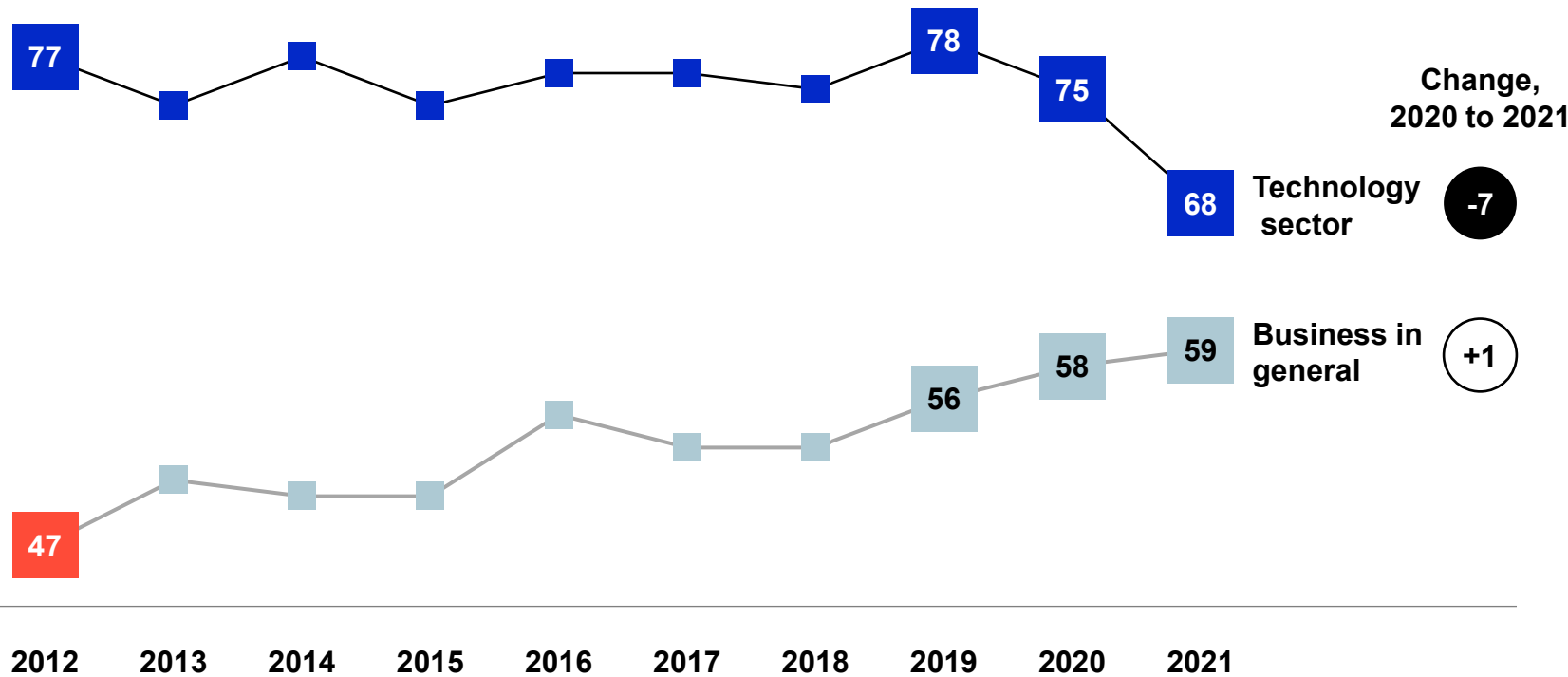
⊥

TRUST DECLINES FOR TECHNOLOGY SECTOR

T

TECHNOLOGY SECTOR TRUST DECLINE DEEPENS

Percent trust in the technology sector vs. trust in business



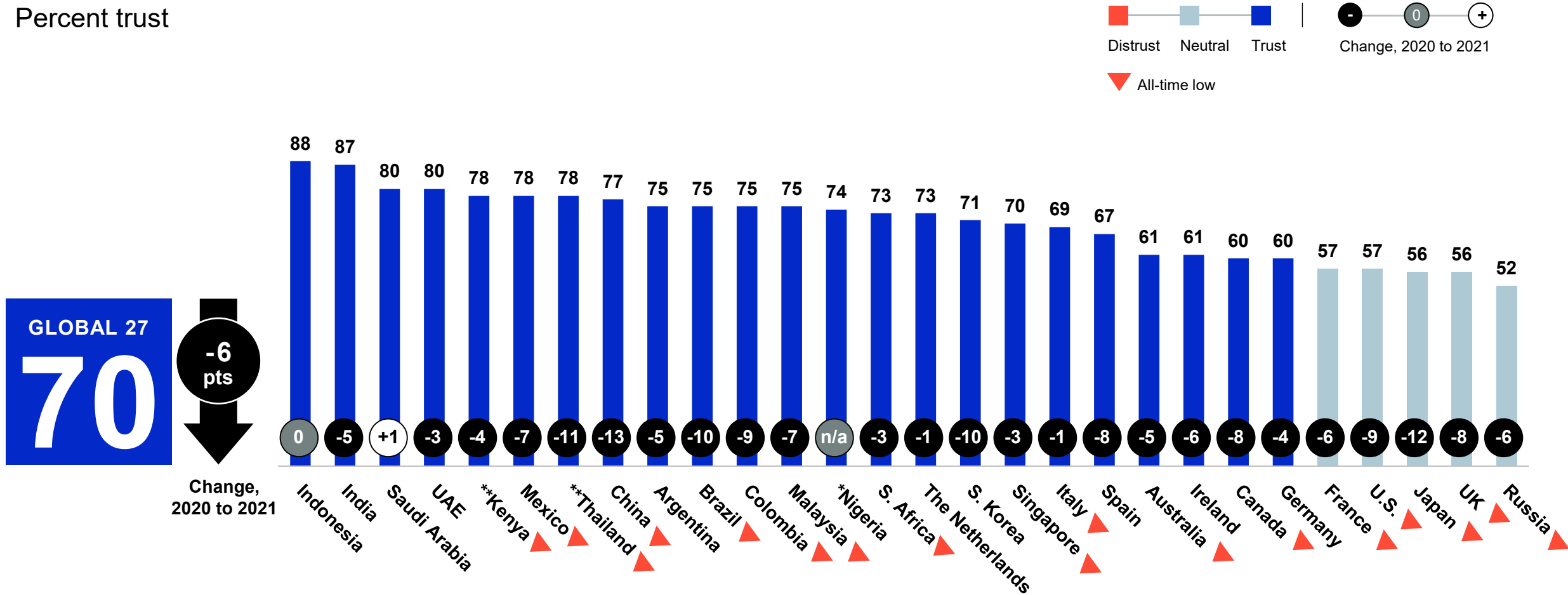
Countries with double-digit declines in technology trust since 2020

	Percent trust, 2021	Change, 2020 to 2021
China	77	-13
Japan	56	-12
Thailand	78	-11
Brazil	75	-10
S. Korea	71	-10

2021 Edelman Trust Barometer. TRU_IND. [TECHNOLOGY] 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. TRU_INS. [BUSINESS] 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, 22-mkt avg.

TRUST IN TECHNOLOGY REACHES ALL-TIME LOWS IN 17 OF 27 COUNTRIES

Percent trust



2021 Edelman Trust Barometer. TRU_IND. [TECHNOLOGY] 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.

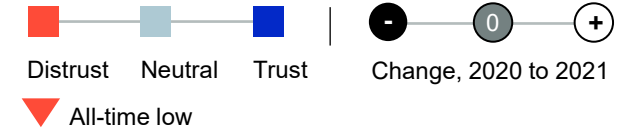
Industries shown to half of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

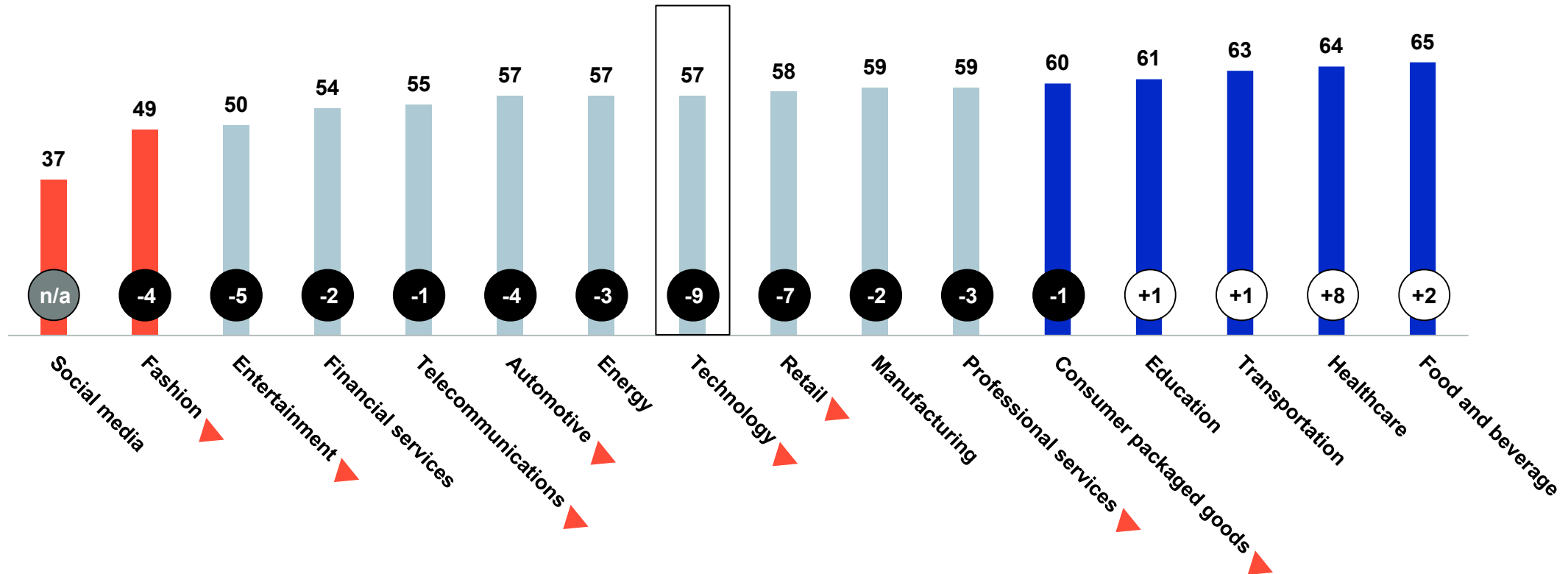
**Kenya and Thailand only asked from 2020-21

IN THE U.S., GREATEST TRUST DECLINE IN TECHNOLOGY

Percent trust in each sector, in the U.S.

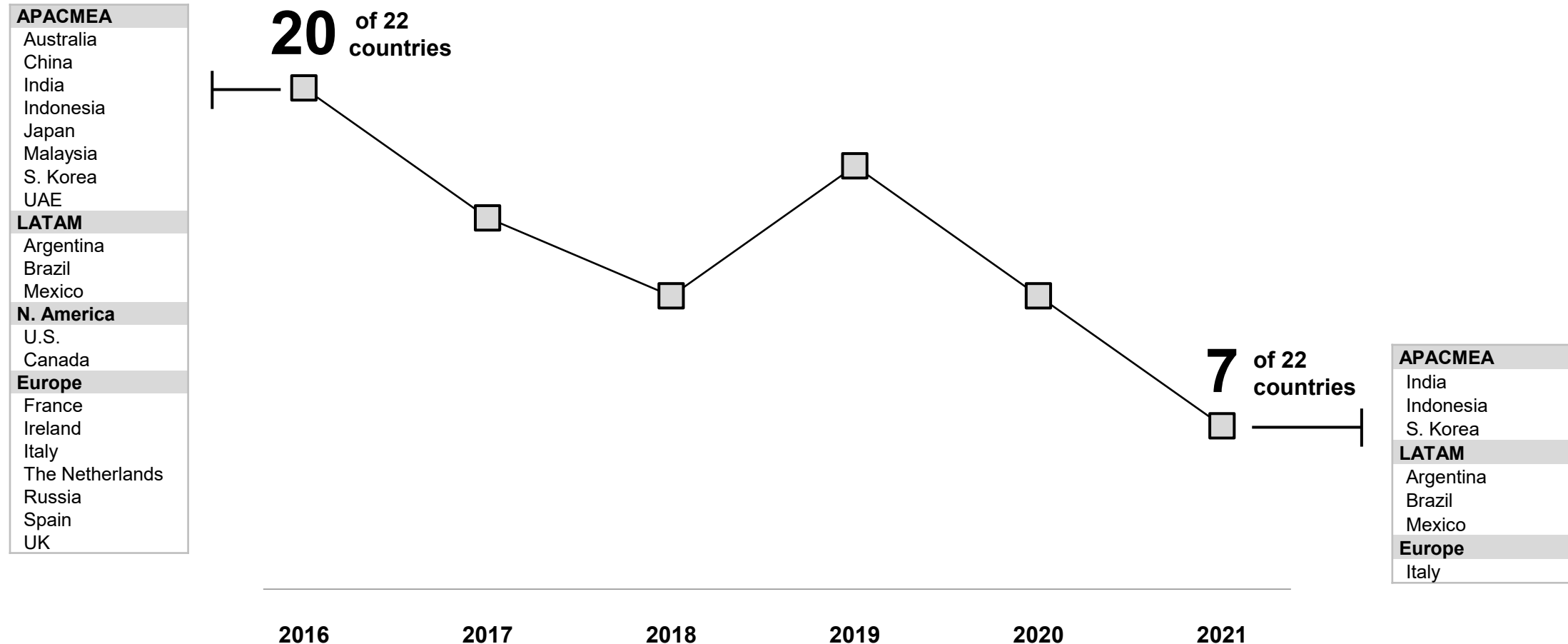


*In 2020, technology was the most trusted sector in the U.S.
In 2021, it falls to 9th place*



TECHNOLOGY SECTOR LOSES ITS TRUST LEADERSHIP

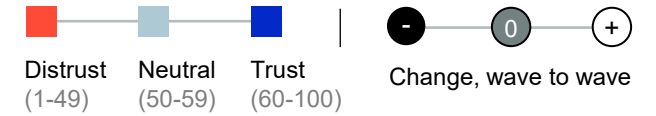
Number of countries in which technology is the #1 most trusted sector



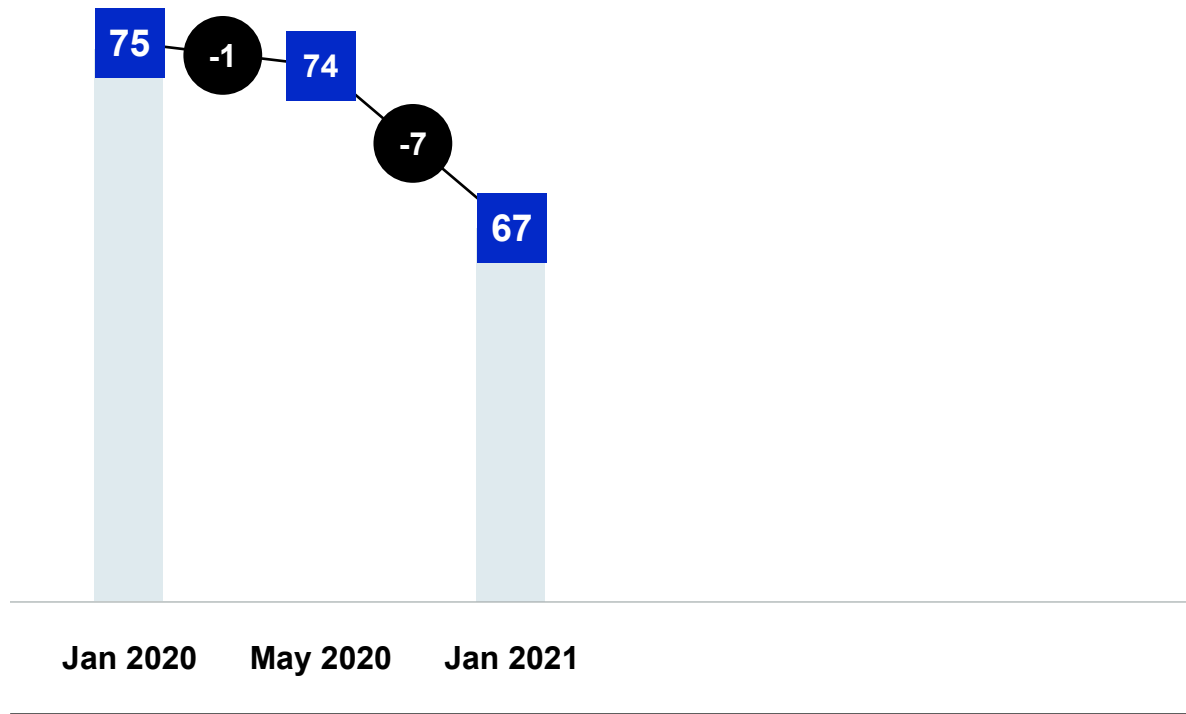
2021 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 22-mkt avg.

DRAMATIC DROPS IN TECHNOLOGY TRUST DURING PANDEMIC

Trust in technology, 11 countries included in the 2020 Trust Barometer Spring Update



Global 11, trust in technology



Countries	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
China	+3	-16
Canada	+7	-15
U.S.	+4	-13
UK	+4	-12
Germany	+3	-7
France	0	-6
Mexico	-1	-6
S. Korea	-6	-4
Japan	-10	-2
India	-4	-1
Saudi Arabia	0	+1

2021 Edelman Trust Barometer. TRU_IND. [TECHNOLOGY] 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, 11-mkt avg.

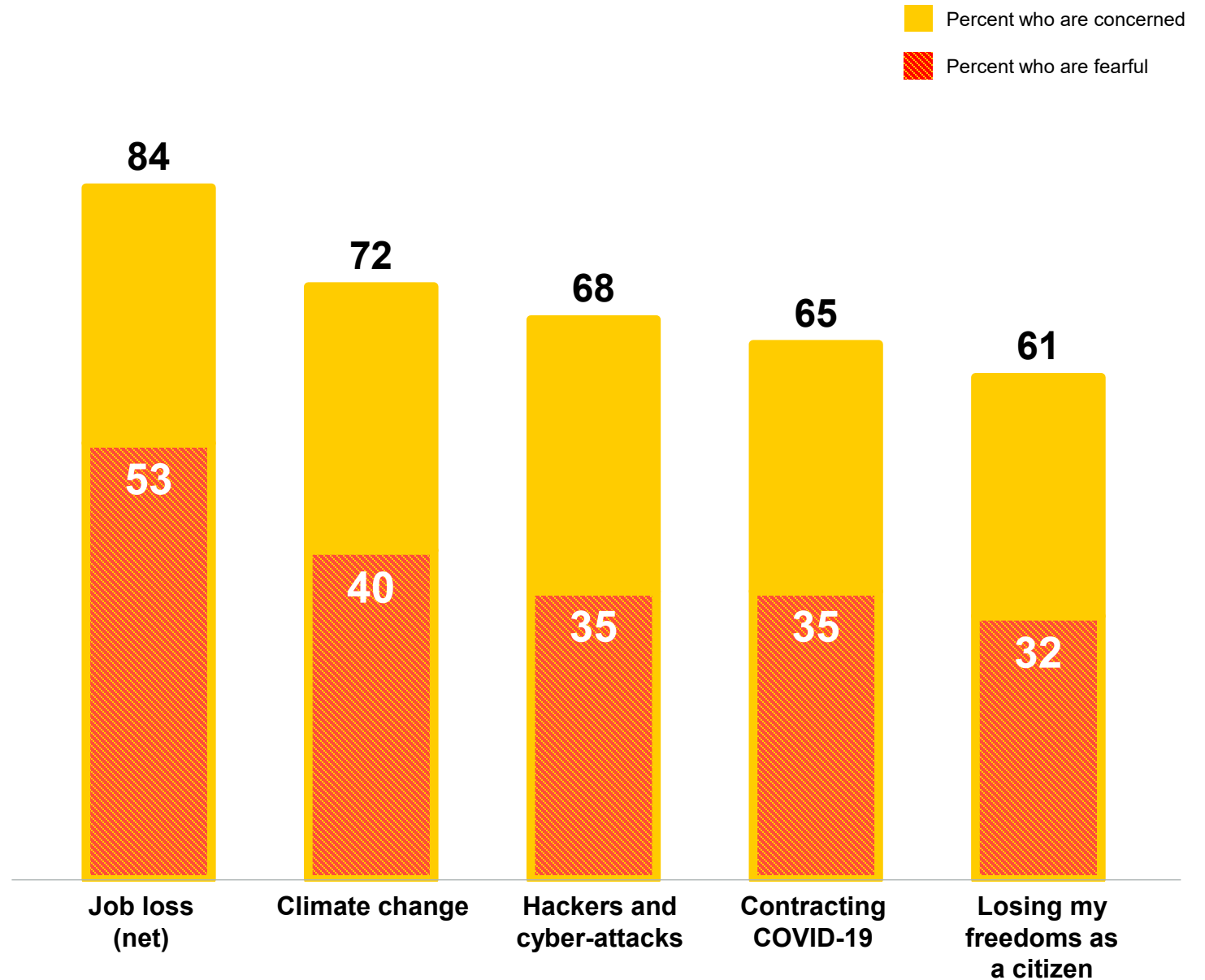
┆

PANDEMIC MAGNIFIES TECH-RELATED FEARS

┆

BIGGEST DRIVERS OF SOCIETAL CONCERNS AND FEARS TODAY

Percent who are concerned, and percent who are fearful

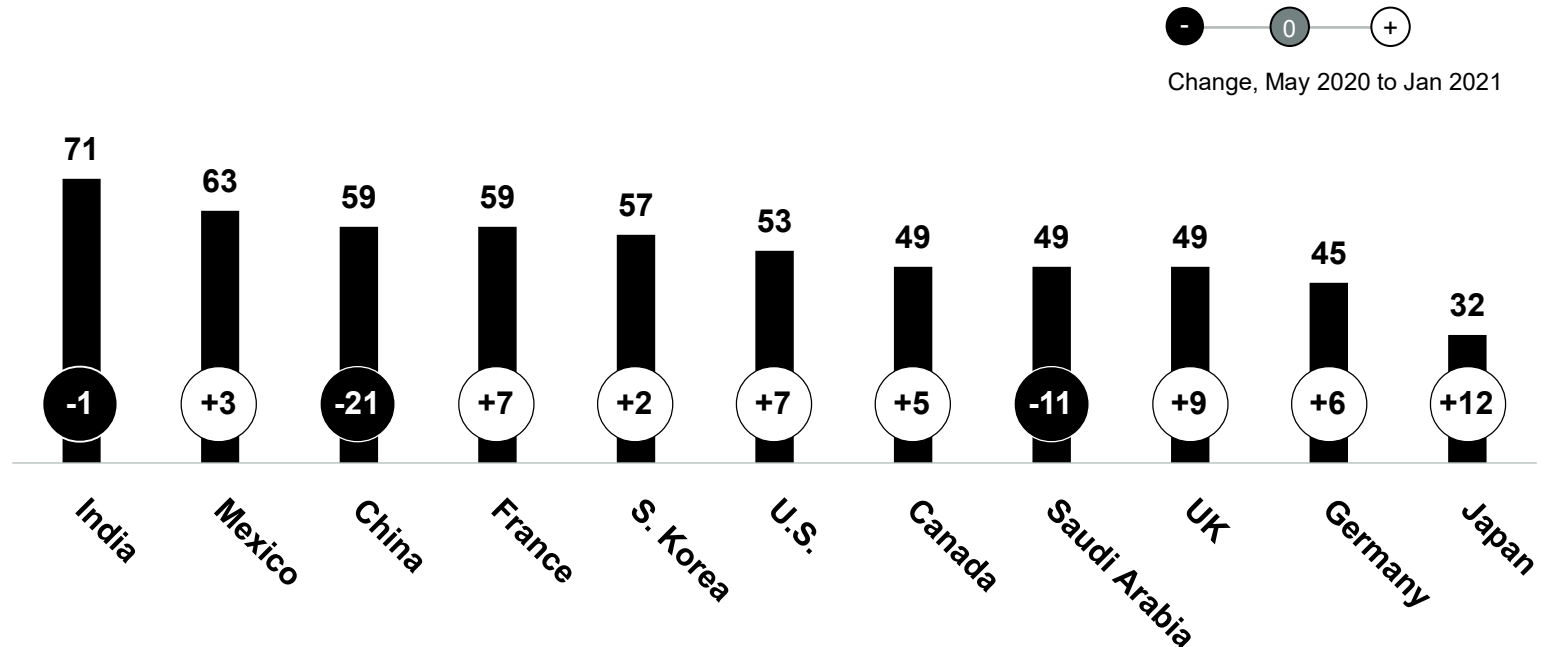
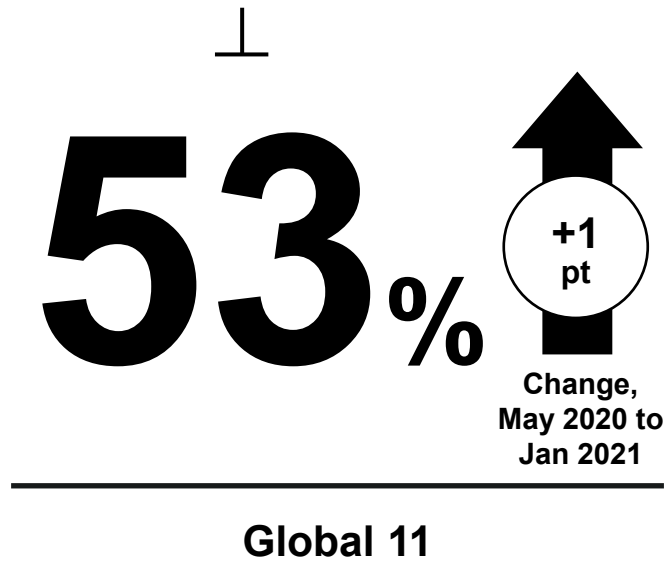


2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes shown to half of the sample. General population, 27-mkt avg. Job loss asked of those who are an employee (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.

PANDEMIC ACCELERATES TECH-RELATED JOB LOSS FEARS

Percent who agree

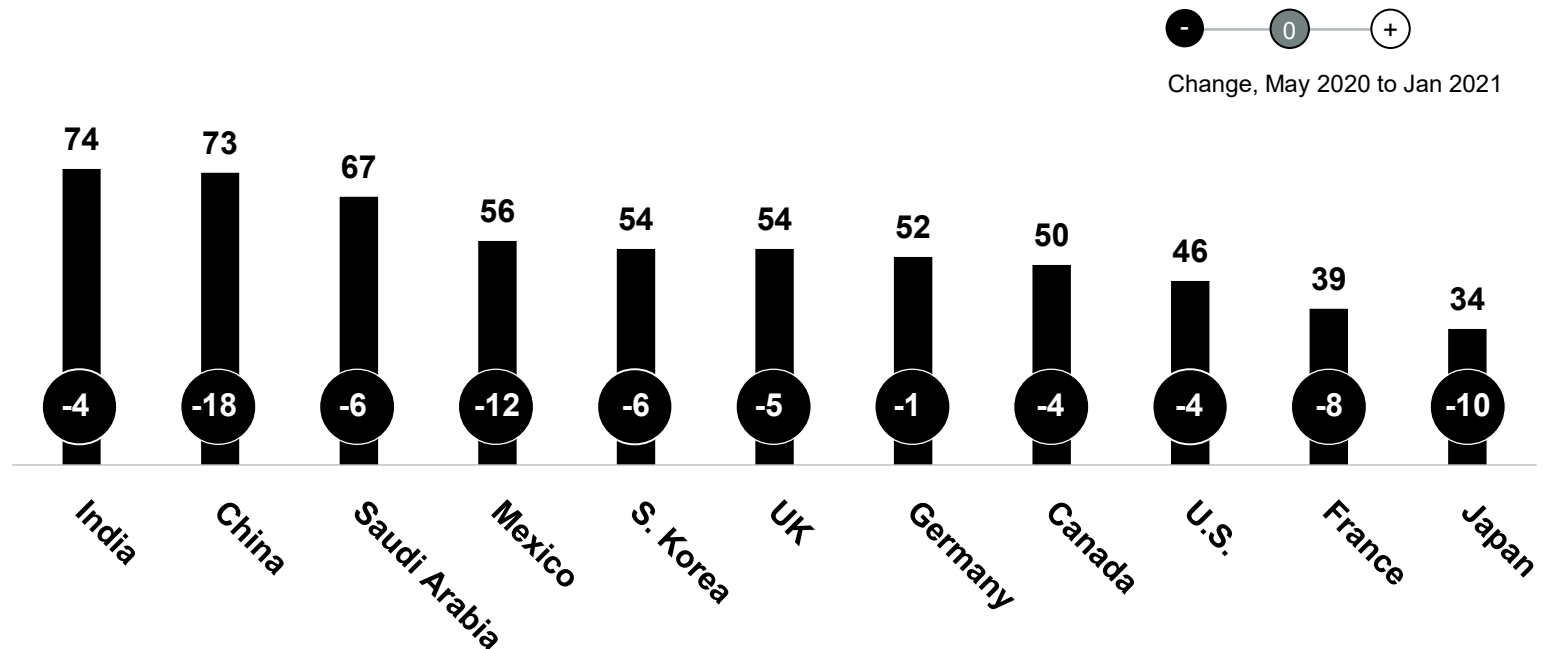
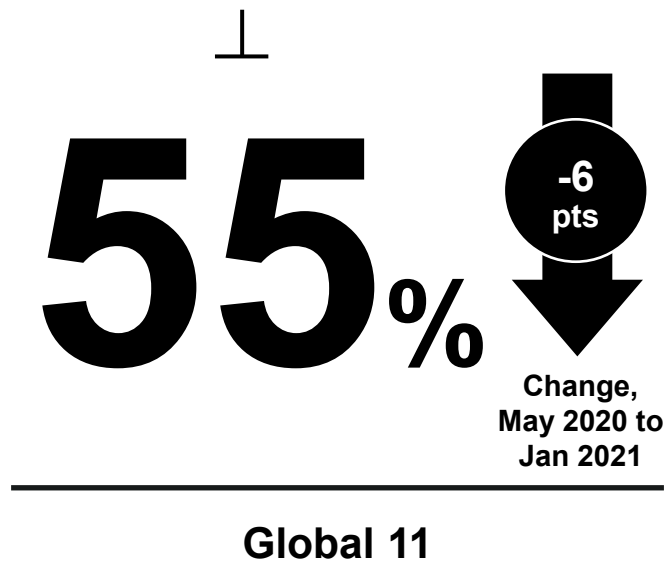
I worry that the **pandemic will accelerate** the rate at which companies **replace human workers with AI and robots**



WILLINGNESS TO SHARE PERSONAL DATA TO FIGHT PANDEMIC DECLINES

Percent who agree

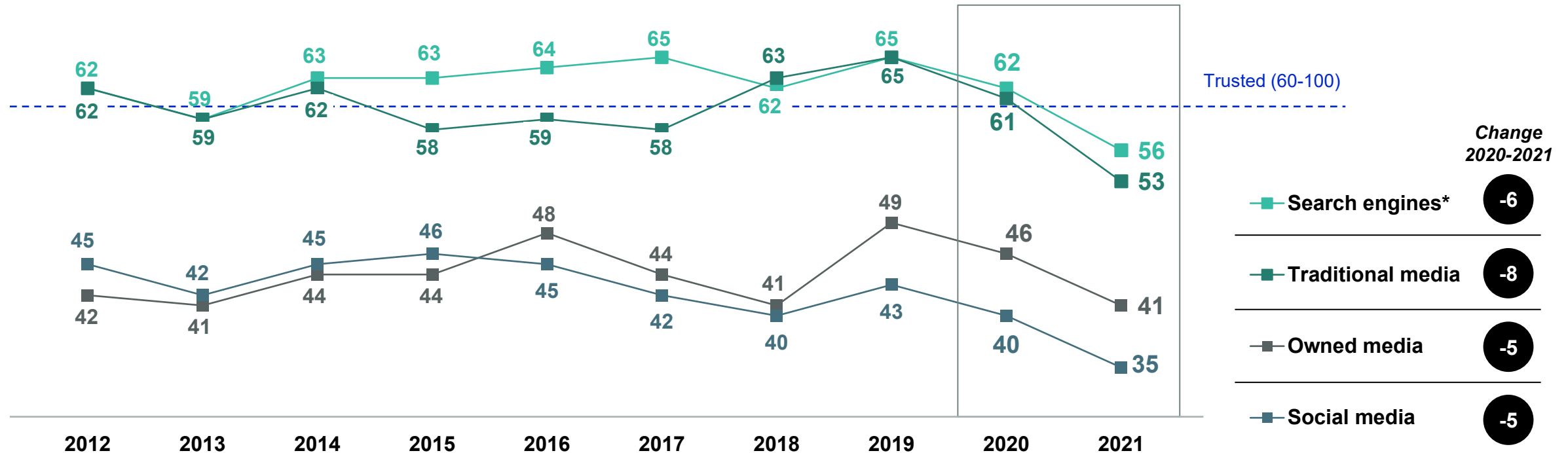
I am **willing to give up more of my personal health and location tracking information** to the government than I normally would in order to help track and contain the spread of the virus



TRUST IN ALL INFORMATION SOURCES AT RECORD LOWS

Percent trust in each source for general news and information

Global 22



2021 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? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg.

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

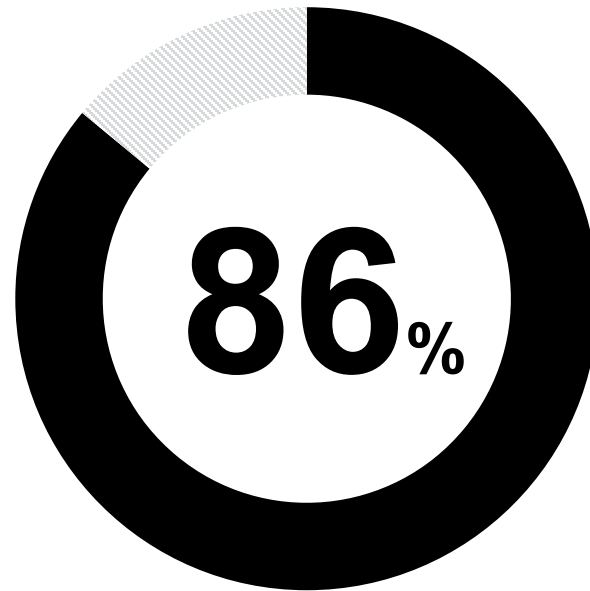
⌊

**BUSINESS IS EXPECTED
TO LEAD RESPONSIBLY
ON SOCIETAL ISSUES**

⌋

CEOS MUST LEAD ON SOCIETAL ISSUES SUCH AS PANDEMIC IMPACT AND JOB AUTOMATION

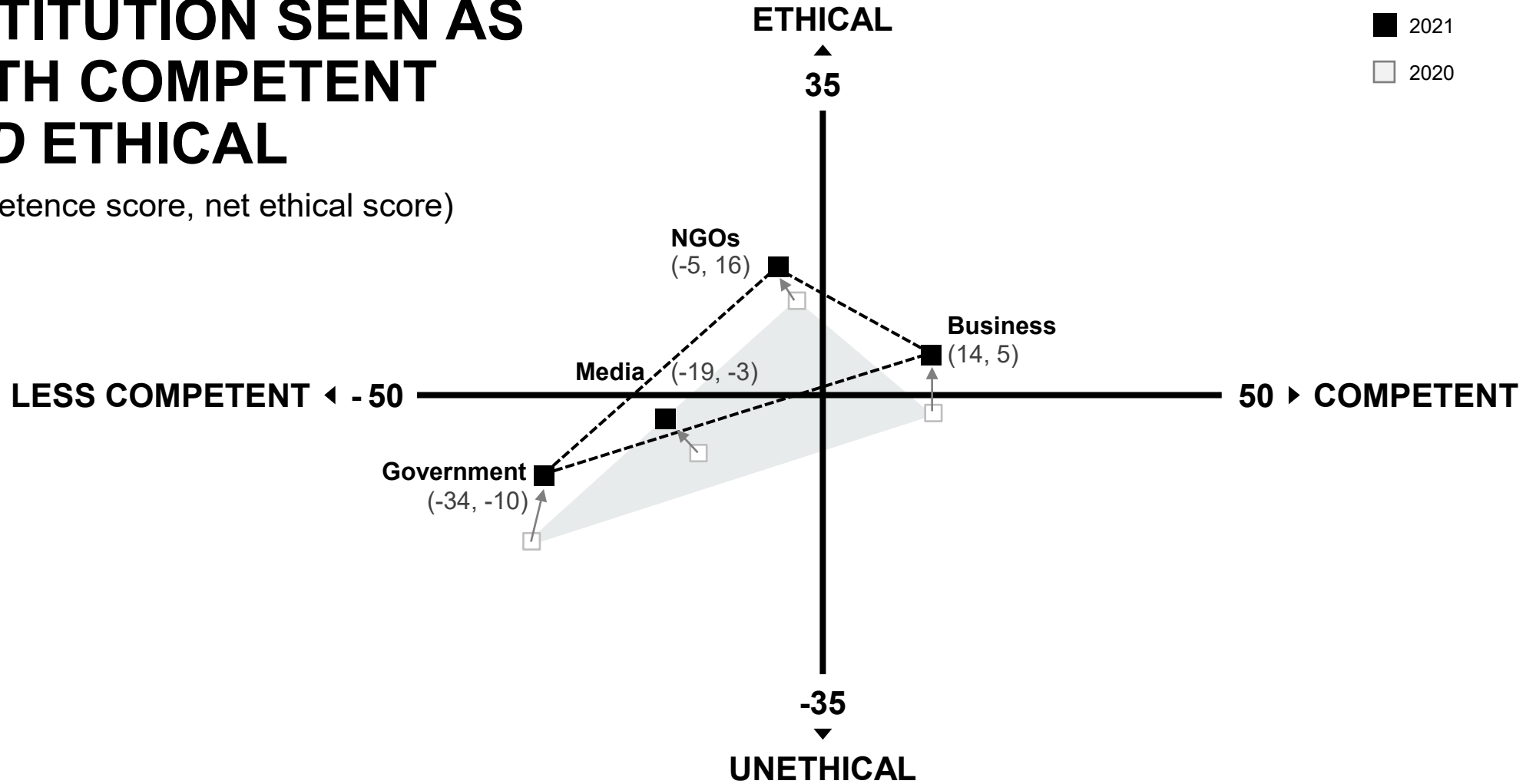
I expect **CEOs to publicly speak out** about one or more of these societal challenges



Pandemic impact	59
Job automation	51
Societal issues	43
Local community issues	40

BUSINESS NOW ONLY INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL

(Competence score, net ethical score)



2021 Edelman Trust Barometer. The ethical scores are averages of nets based on INS_PER_DIM/1-4. Question asked of half of the sample. The competence score is a net based on TRU_3D_INS/1. Depending on the question it was either asked of the full of half the sample. General population, 24-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.

BUSINESS GAINS THE MOST TRUST BY BEING A GUARDIAN OF INFORMATION QUALITY

Percent increased likelihood of trusting business associated with performing well on each action

<i>When these actions are performed well...</i>	Increased likelihood of trust
Guarding information quality	+5.8%
Embracing sustainable practices	+5.7%
Robust COVID-19 health and safety response	+4.8%
Driving economic prosperity	+4.7%
Long-term thinking over short-term profits	+4.6%

⌊

**TECHNOLOGY COMPANIES MUST
ENAGAGE EMPLOYEES TO
ADVANCE CHANGE**

⌋

EMPLOYER TRUST HIGHEST AMONG TECHNOLOGY SECTOR EMPLOYEES

Percent trust in my employer, among sector employees

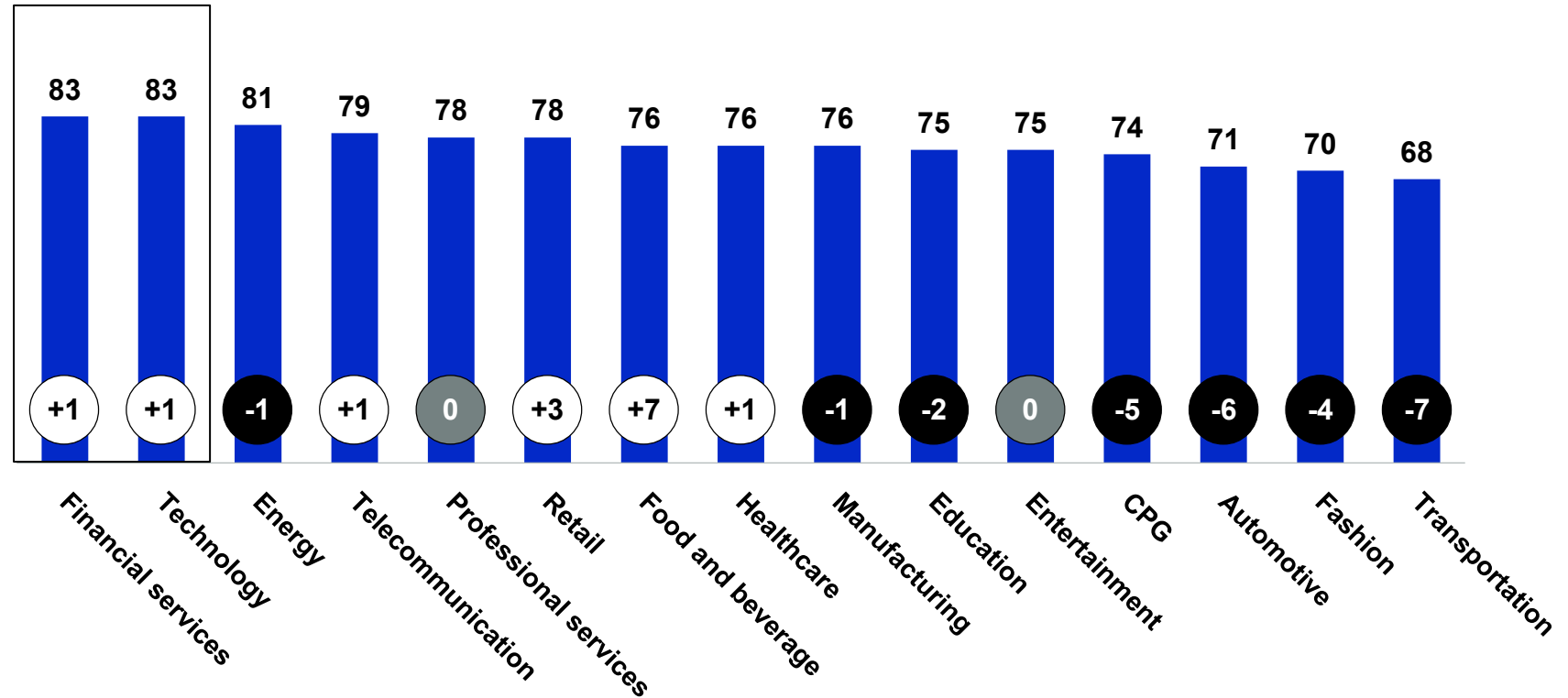


Among those employed in each of the following sectors..

All employees, global 27

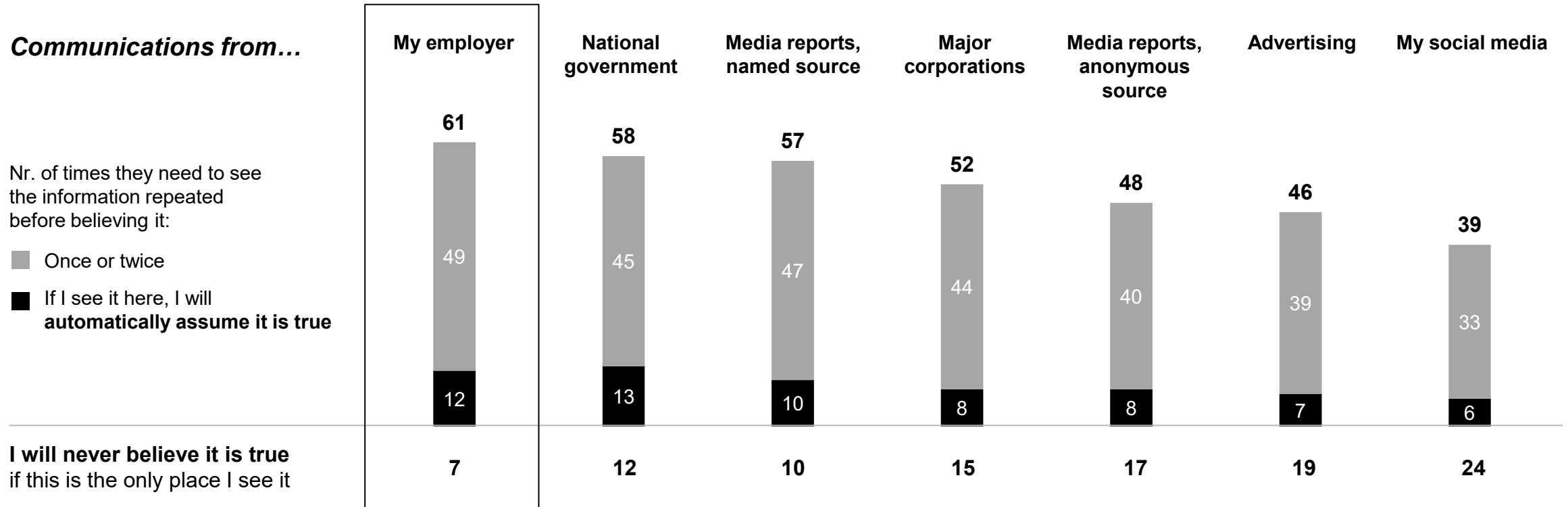


Change, 2020 to 2021



EMPLOYER MEDIA MOST BELIEVABLE

Percent who believe information from each source automatically, or after seeing it twice or less



2021 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample. "Once or twice" is a sum of codes 2 and 3. General population, 27-mkt avg. "Employer communications" only shown to those that are an employee (Q43/1).

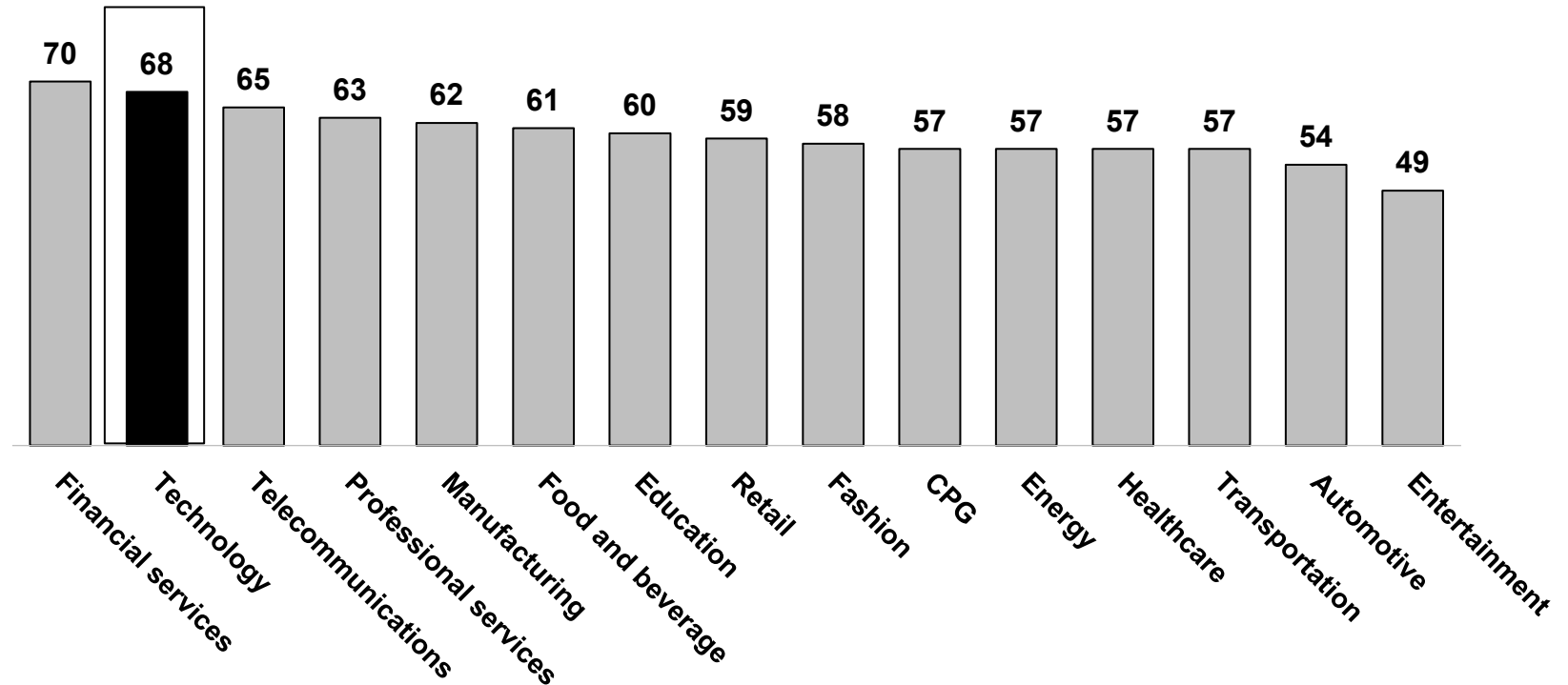
TECH EMPLOYERS EXPECTED TO BE TRUSTED SOURCES OF INFORMATION

Percent who agree, among sector employees

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 in our country today

All employees,
global 27

59%



TECHNOLOGY EMPLOYEES PLACE MORE IMPORTANCE ON REMOTE WORK OPTION AND UPSKILLING

Change in importance since last year (more important minus less important,) among technology sector employees

2021 Edelman Trust Barometer. EMP_IMP_VAL. When considering an organization as a potential place of employment, please indicate whether each of the following has become more important to you, less important to you, or has stayed the same in importance since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. Question asked of those who are an employee (Q43/1). General population, 27-mkt avg., and among technology employees (Q43/1 AND Q420/13). Net change is the difference between more and less important.

<i>Change in importance as an employer attribute since the start of the year...</i>	<i>Net change</i>			
	All employees	Tech employees	More Important	Less Important
Keep workers, customers safe	+49	+50	61	11
Option to work remotely, even when the pandemic is over	+42	+50	61	11
Job skills training programs	+44	+48	59	11
Regular employee communications	+44	+47	58	11

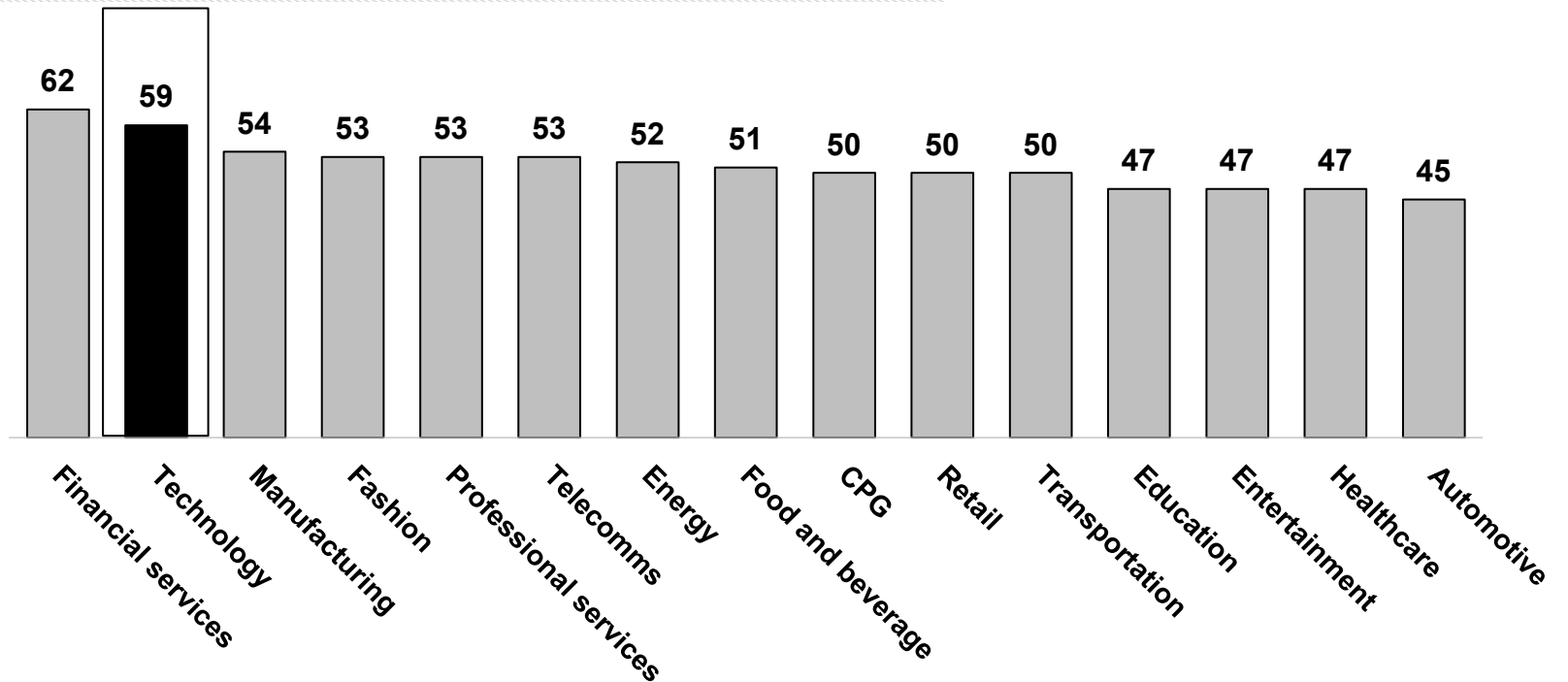
TECH EMPLOYEES AMONG MOST LIKELY TO SPEAK OUT AND PROTEST AT WORK

Percent who agree, among sector employees

I am more likely now than a year ago to voice my objections to management or engage in workplace protest if I were to strongly disagree with an action the organization has taken or a policy they have implemented

All employees, global 27

50%



EMPLOYEES AND CONSUMERS ARE KEY STAKEHOLDERS – AND KEY CHANGE AGENTS

Percent who agree

62%

Employees ...

68%

Consumers ...

**have the power to force
corporations to change**

TRUST IN TECH MUST ADVANCE WITH THE PACE OF CHANGE

ACROSS THE MOST IMPORTANT ISSUES OF OUR TIME

Shared Prosperity

Automation, jobs, skills & the economy

Codifying Trust in Technology

Fairness, explainability, robustness

Diversity & Innovation

Diversity, equity & inclusion in tech

Data Responsibility

Human rights & privacy

Technology For Social Good

Innovation & SDGs

Sustainable Technology

Lifecycles & ecosystems

ROADMAP FOR RESTORING TRUST IN TECHNOLOGY

1

Business: Embrace mandate to lead

CEOs must lead on issues from responsible AI and automation to upskilling. Act first, talk after.

2

Lead with facts, act with empathy

Societal leaders must have the courage to provide straight talk, but also empathize and address people's fears.

3

Provide trustworthy content

Tech companies must provide truthful, unbiased, reliable information.

4

Partner for stronger outcomes

Tech companies should lead by forging new partnerships with institutions and across industries to take collective action and solve societal problems.

⊥

THANK YOU

⊥

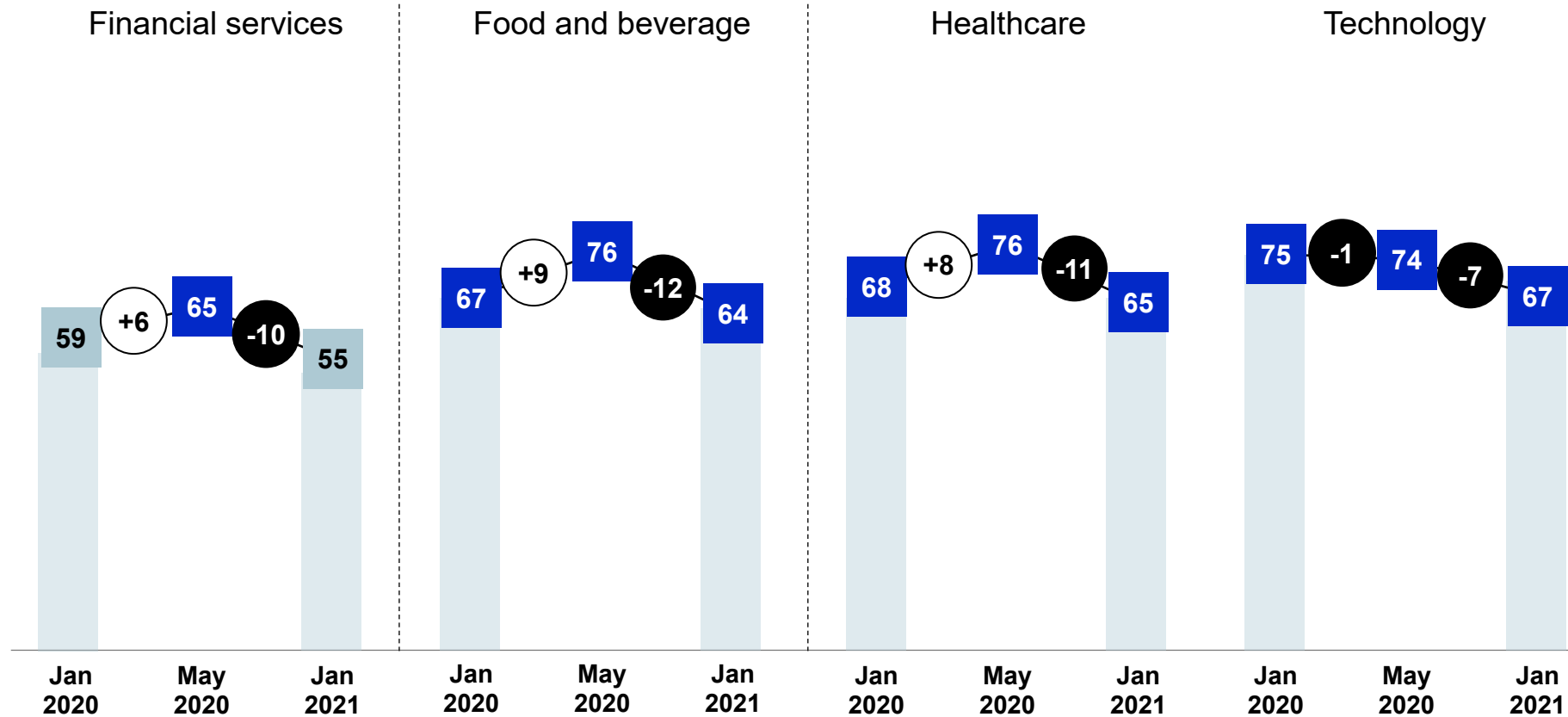
⊥

APPENDIX

⊥

NO SPRING PANDEMIC TRUST SURGE FOR THE TECHNOLOGY SECTOR

Percent trust in sectors, 11 countries included in the 2020 Trust Barometer Spring Update



2021 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, 11-mkt avg.

BUSINESS MUST DO MORE TO DEMONSTRATE SUSTAINABLE PRACTICES

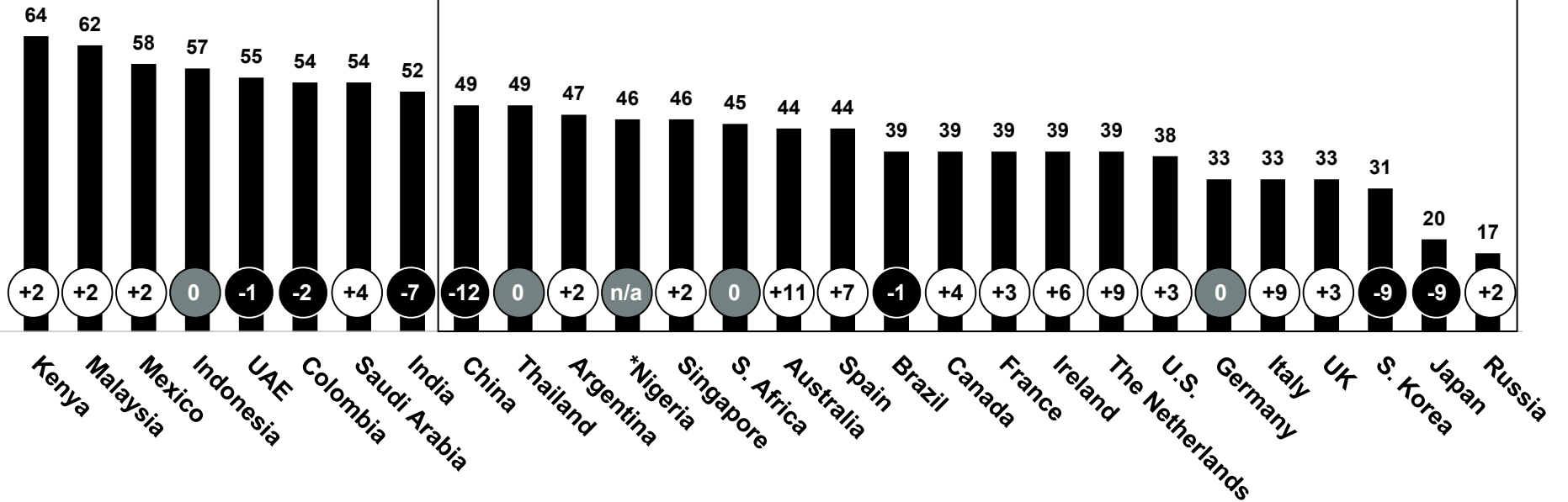
Percent who say

Business is doing well on **embracing sustainable practices across their business**

● 0 ● Change, 2020 to 2021

Global 27

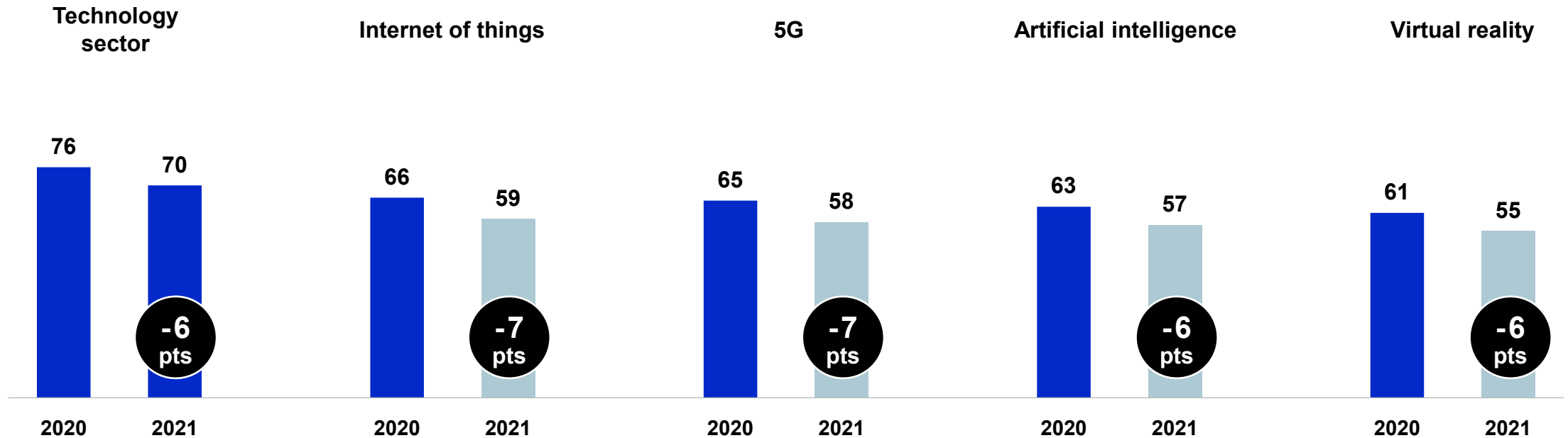
43% Opt
Change, 2020 to 2021



2021 Edelman Trust Barometer. PER_BUS. How well do you feel business is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of half of the sample. General population, 27-mkt avg.
*Nigeria not included in the global average

TRUST DECLINES ACROSS TECHNOLOGY SUBSECTORS

Percent trust

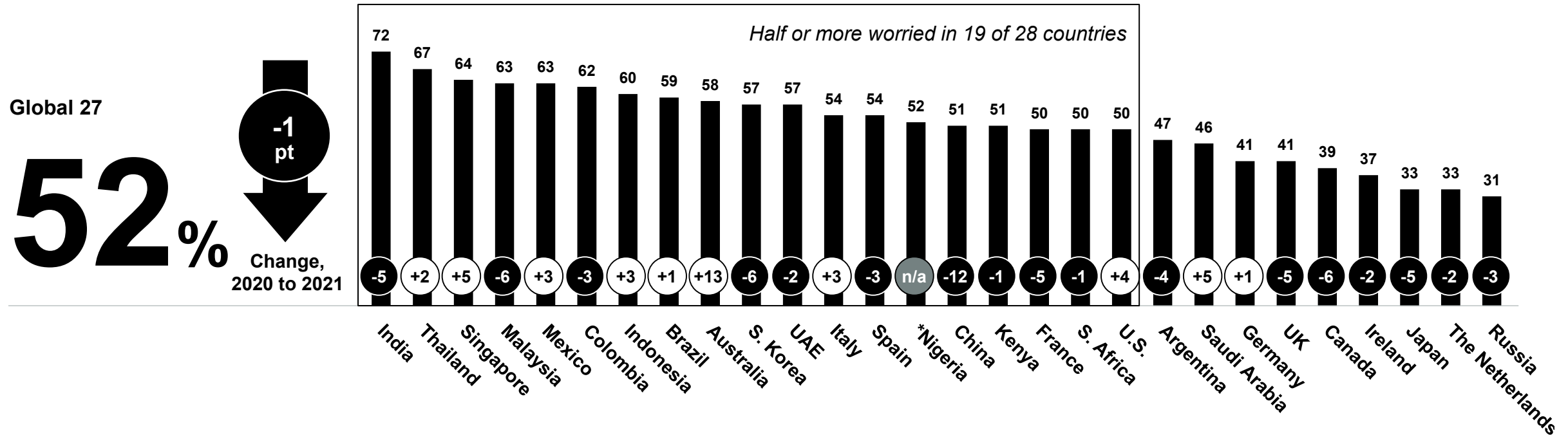


WIDESPREAD FEAR OF TECH-RELATED JOB LOSS

Percent who are worried

I worry that **automation/other innovations will take my job away**

● 0 ● Change, 2020 to 2021



2021 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, worry. Attribute asked among those who are an employee (Q43/1). General population, 27-mkt avg. *Nigeria not included in the global average

INDUSTRY SECTORS OVER TIME

Percent trust in each sector

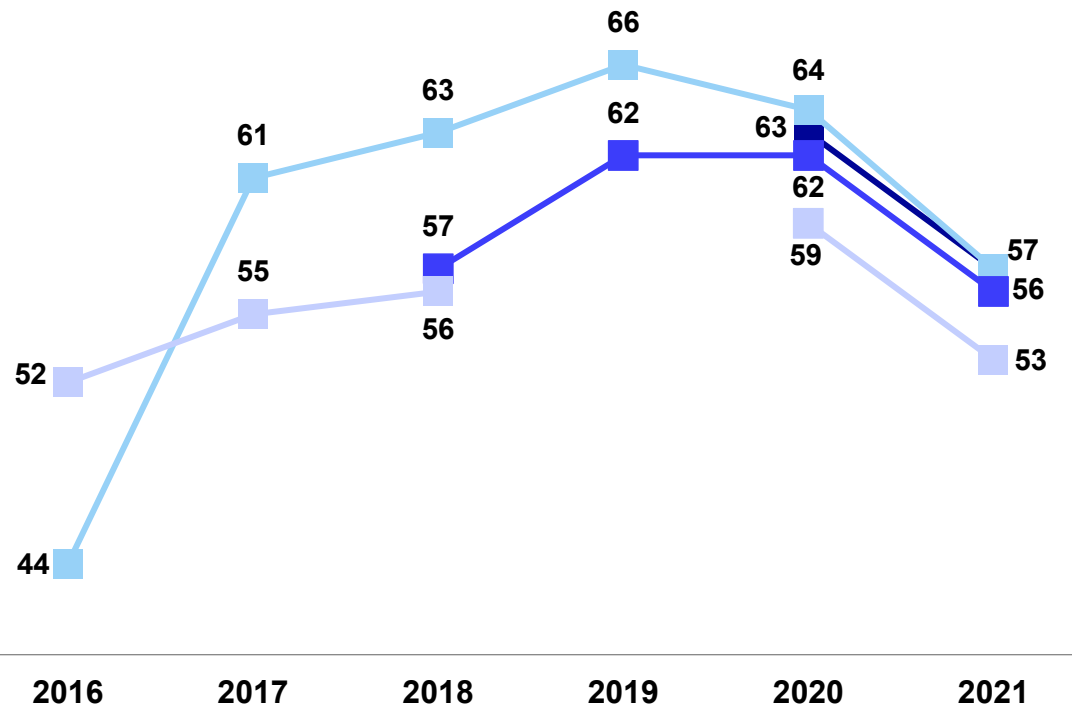
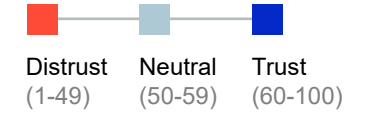


Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend
Technology	77	74	77	74	76	76	75	78	75	68	-9
Healthcare	-	-	-	-	64	67	65	68	67	66	n/a
Food and beverage	64	64	65	64	65	68	64	69	67	65	+1
Telecommunications	59	61	62	60	61	64	64	67	65	61	+2
Automotive	63	66	70	67	62	66	63	69	67	60	-3
Consumer packaged goods	58	61	62	61	62	64	61	65	62	60	+2
Energy	54	58	57	57	59	62	63	65	63	59	+5
Entertainment	-	63	66	64	66	65	63	68	65	59	n/a
Financial services	44	47	49	48	52	55	55	57	56	52	+8

2021 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, 22-mkt avg.

TRUST DECLINES ACROSS TECHNOLOGY SUBSECTORS

Percent trust in the technology subsectors



Subsectors	2016	2017	2018	2019	2020	2021
5G	-	-	-	-	63	57
Internet of things	44	61	63	66	64	57
Artificial Intelligence	-	-	57	62	62	56
V/R platforms	52	55	56	-	59	53

TRUST IN TECHNOLOGY SUBSECTORS DECLINES ACROSS REGIONS

Percent trust



Technology sector	Internet of things		5G		Artificial intelligence		Virtual reality	
	2021	+/- yty	2021	+/- yty	2021	+/- yty	2021	+/- yty
APACMEA	75	-6	66	-8	66	-7	65	-6
LATAM	76	-8	70	-6	64	-7	68	-4
N. America	59	-8	44	-4	47	+1	42	-4
Europe	63	-5	46	-6	45	-7	42	-8

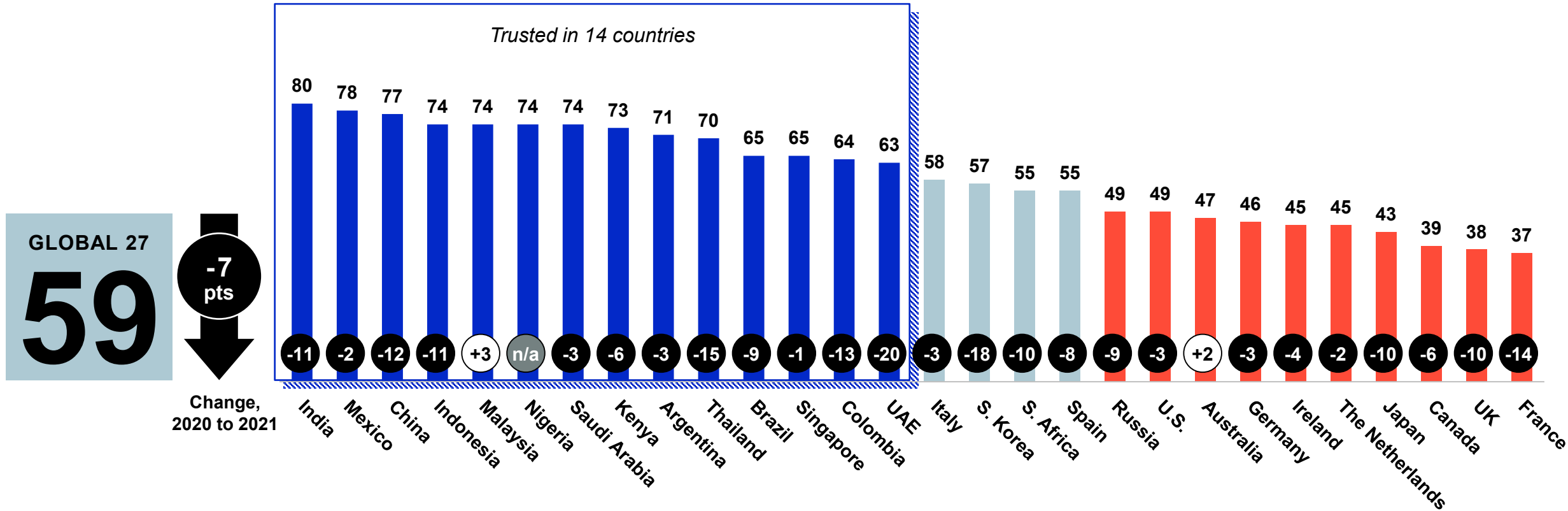
2021 Edelman Trust Barometer. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, by region.

*Nigeria not included in APACMEA average

TRUST IN INTERNET OF THINGS DECREASES IN 25 OF 27 COUNTRIES



Percent trust



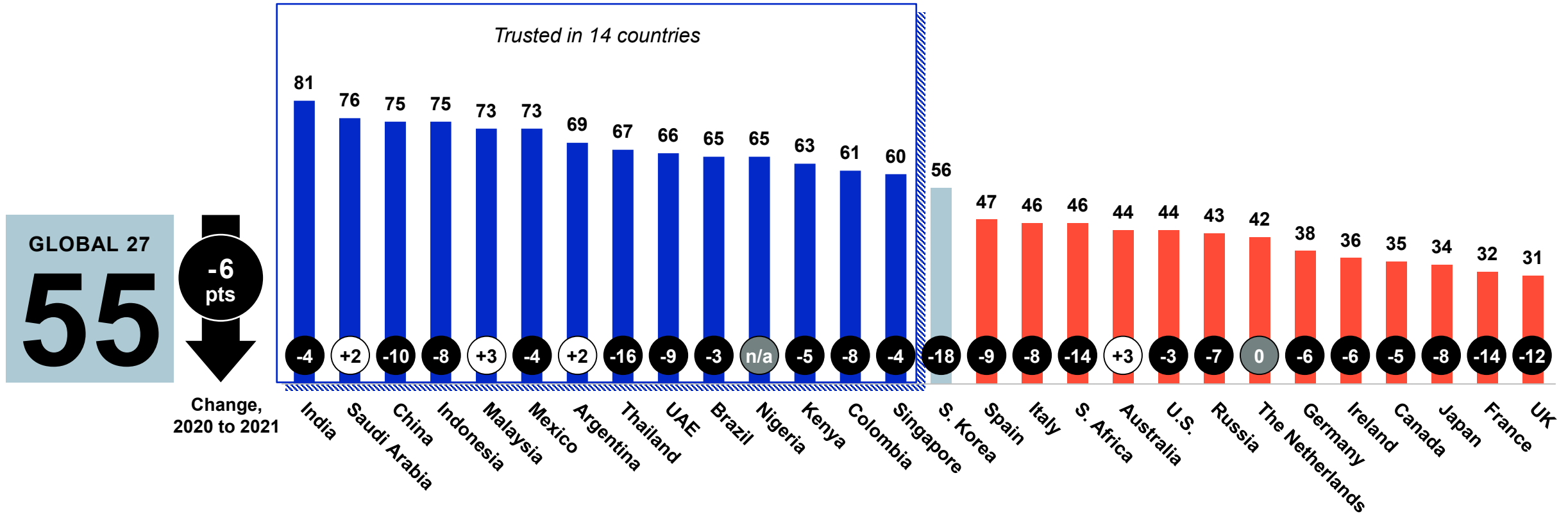
2021 Edelman Trust Barometer. TRU_SUB_TEC. [INTERNET OF THINGS] Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

TRUST IN VIRTUAL REALITY DECREASES IN 22 OF 27 COUNTRIES



Percent trust



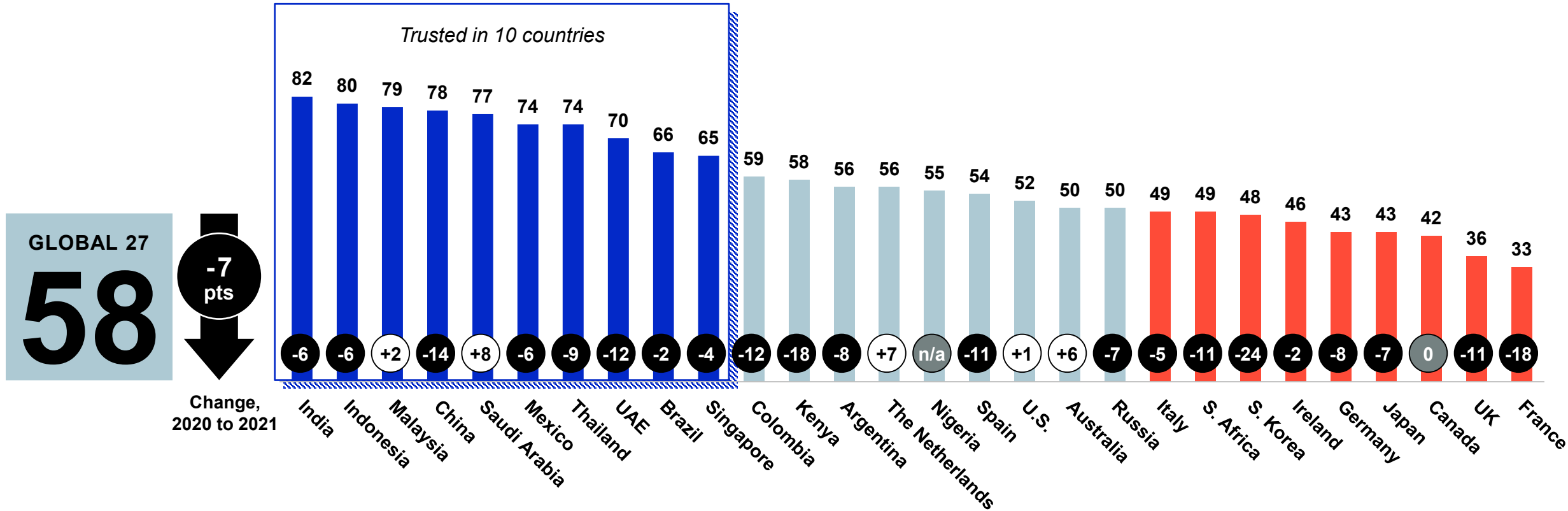
2021 Edelman Trust Barometer. TRU_SUB_TEC. [VIRTUAL REALITY] Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

TRUST IN 5G DECREASES IN 21 OF 27 COUNTRIES



Percent trust



2021 Edelman Trust Barometer. TRU_SUB_TEC. [5G] 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, 27-mkt avg.

*Nigeria not included in the global average

TRUST IN ARTIFICIAL INTELLIGENCE DECREASES IN 25 OF 27 COUNTRIES

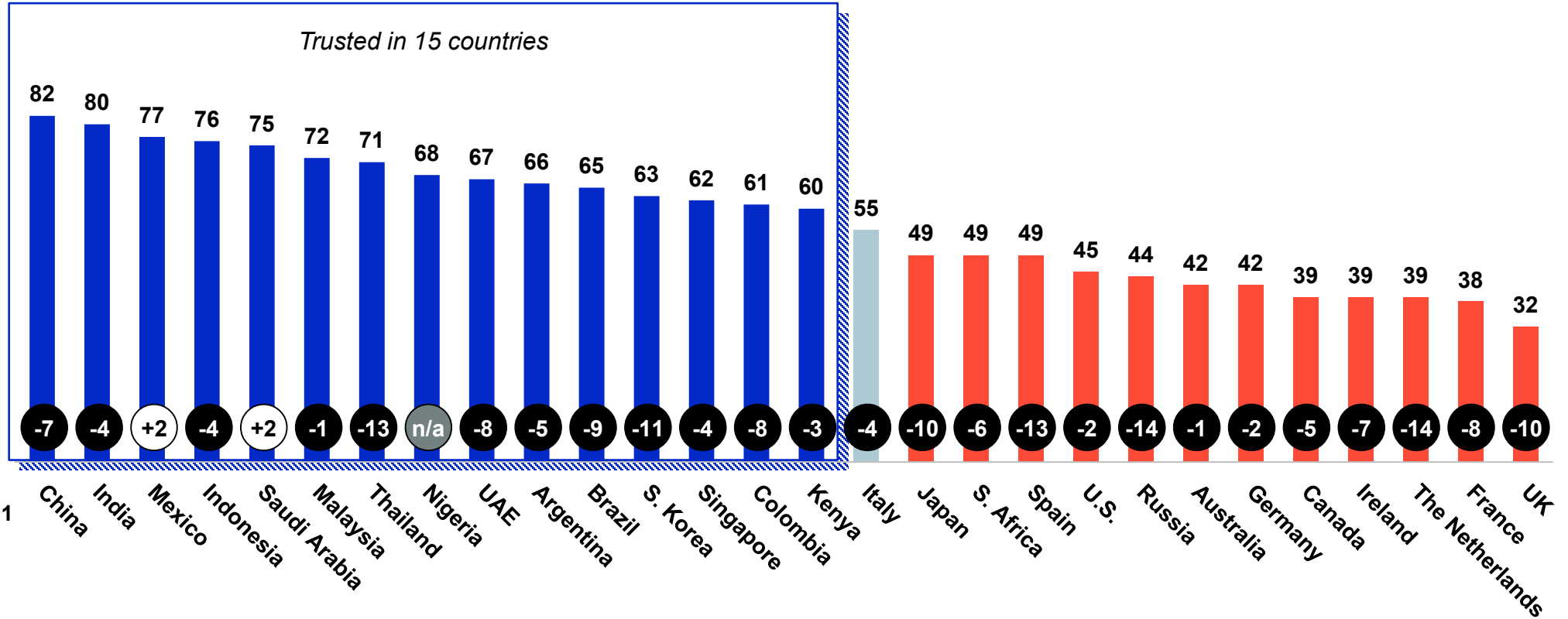


Percent trust

GLOBAL 27
57

-6 pts

Change, 2020 to 2021





2021 Edelman Trust Barometer. TRU_SUB_TEC. [ARTIFICIAL INTELLIGENCE] 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, 27-mkt avg.

*Nigeria not included in the global average

TECHNOLOGY NO LONGER MOST TRUSTED SECTOR IN 7 OF 22 COUNTRIES

Countries in which technology is the most trusted sector measured

 Technology sector most trusted
 Technology sector not the most trusted

# of countries in which technology is the most trusted sector	APACMEA									LATAM				No. America		Europe							
	Australia	China	India	Indonesia	Japan	Malaysia	Singapore	S. Korea	UAE	Argentina	Brazil	Mexico	Canada	U.S.	France	Germany	Ireland	Italy	Russia	Spain	The Netherlands	UK	
2016	20	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
2017	15	▼	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▼	▼	▼	▲	▲	▲	▼	▼	▼
2018	12	▼	▲	▲	▲	▼	▼	▼	▲	▼	▲	▲	▲	▼	▲	▼	▼	▲	▲	▲	▼	▼	▼
2019	17	▼	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▼	▲	▲	▲	▲	▼	▼	▼
2020	14	▼	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▼	▲	▲	▼	▼	▼	▲	▼	▼	▼
2021	7	▼	▼	▲	▲	▼	▼	▼	▲	▼	▲	▲	▲	▼	▼	▼	▼	▲	▼	▼	▼	▼	▼

2021 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, 22-mkt avg.

INDUSTRY SECTORS OVER TIME

Percent trust in each sector, in the U.S.



Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend
Food and beverage	70	64	69	68	70	73	69	71	63	65	-5
Healthcare	-	-	-	-	59	62	53	61	56	64	n/a
Consumer packaged goods	64	60	66	64	66	68	67	69	61	60	-4
Automotive	60	61	65	60	59	66	62	70	61	57	-3
Energy	54	53	56	59	61	65	63	65	60	57	+3
Technology	78	70	75	73	73	75	74	73	66	57	-21
Telecommunications	58	55	62	59	62	66	66	64	56	55	-3
Financial services	41	43	50	51	54	60	58	58	56	54	+13
Entertainment	-	53	61	61	64	64	55	62	55	50	n/a

In the U.S., trust in technology at an all time low; not trusted for the first time



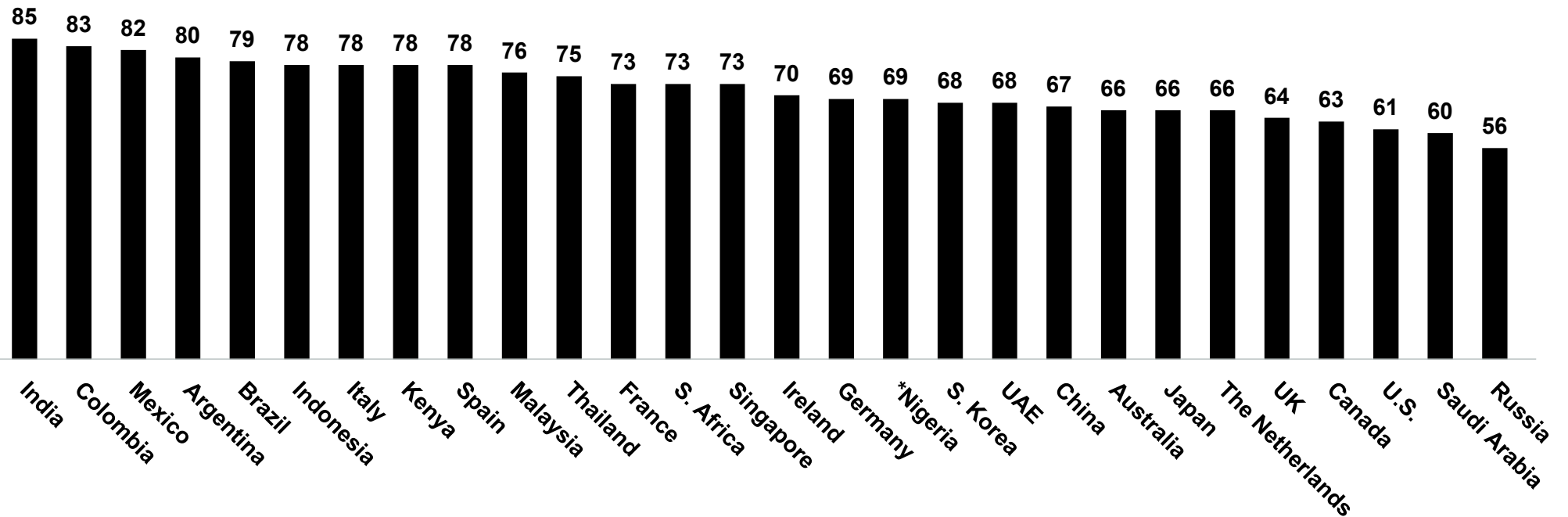
CLIMATE CHANGE CONCERNS HIGH AROUND THE WORLD

Percent who are worried

Climate change leading to drought, rising sea levels and other natural disasters

Global 27

72%

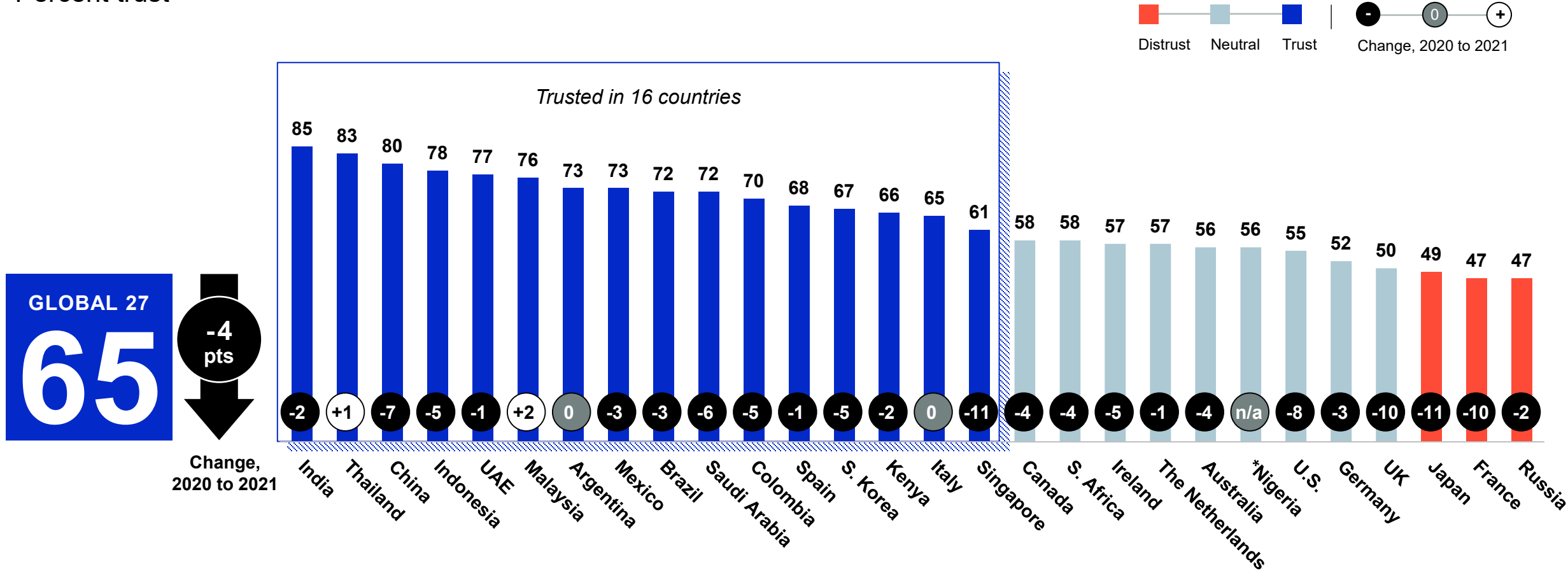


2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Attribute shown to half of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

TRUST IN CLEANTECH DECREASES IN 23 OF 27 COUNTRIES

Percent trust



2021 Edelman Trust Barometer. TRU_SUB_ENE. [CLEANTECH] Now thinking about specific sectors within the energy and manufacturing industries, 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, 27-mkt avg.

*Nigeria not included in the global average