

Spring Update:  
A World in Trauma



# Edelman Trust Barometer 2021



## 2021 Edelman Trust Barometer

# Spring Update: A World in Trauma

## Methodology



Online survey in 14 countries:

**Brazil, Canada, China, France, Germany, India, Japan, Mexico, Saudi Arabia, S. Africa, S. Korea, UAE, UK, and U.S.**

16,800+ respondents total

All fieldwork was conducted between April 30 and May 11, 2021

January 2021 Trust Barometer fieldwork was conducted between October 19 and November 18, 2020

14-market global data margin of error: General population +/- 0.8% (n=16,800), informed public +/- 2.6% (n=1,400), mass population +/- 0.8% (n=13,633).

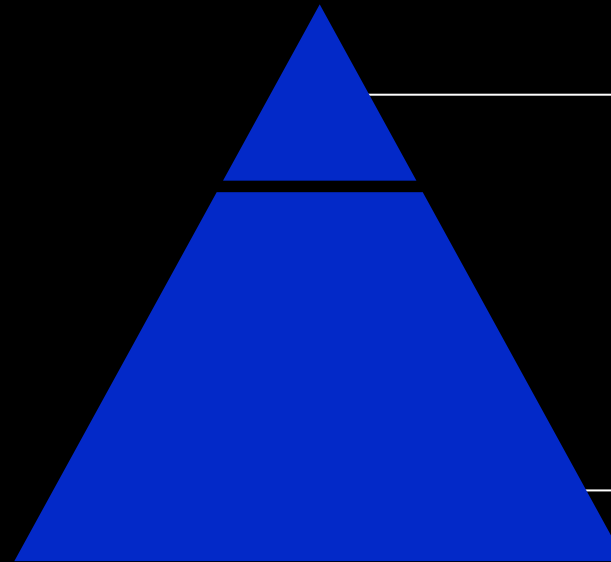
Market-specific data margin of error: General population +/- 2.8% (n=1,200), informed public +/- 9.8% (n=100), mass population +/- 3.0% to 3.7% (n=min 708, varies by market).

## General Online Population

**1,200**  
respondents  
per country

Ages  
**18+**

All slides show general  
online population data  
unless otherwise noted



### Informed Public

**100** respondents in each country

Represents **19%** of total global population

Must meet 4 criteria

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



### Mass Population

All population not  
including informed public

Represents **81%** of total  
global population

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# STATE OF TRUST: AN UNEQUAL RECOVERY

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# DOUBLE-DIGIT TRUST INEQUALITY IN 13 OF 14 COUNTRIES

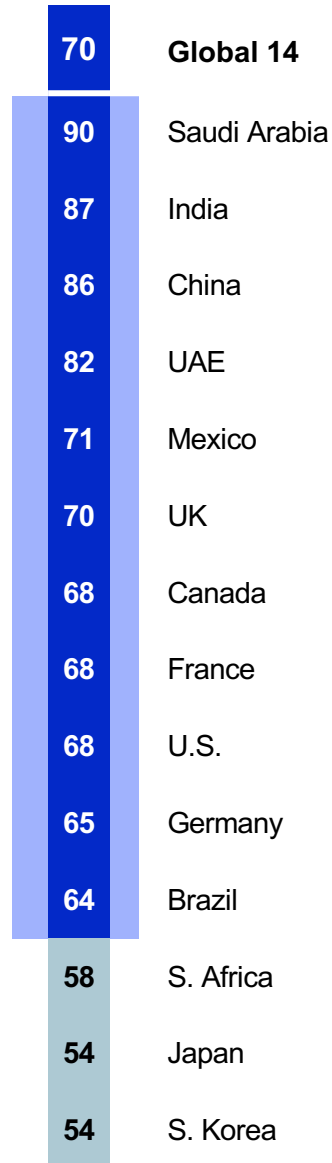
Trust Index

Informed public 17 points more trusting than the mass population

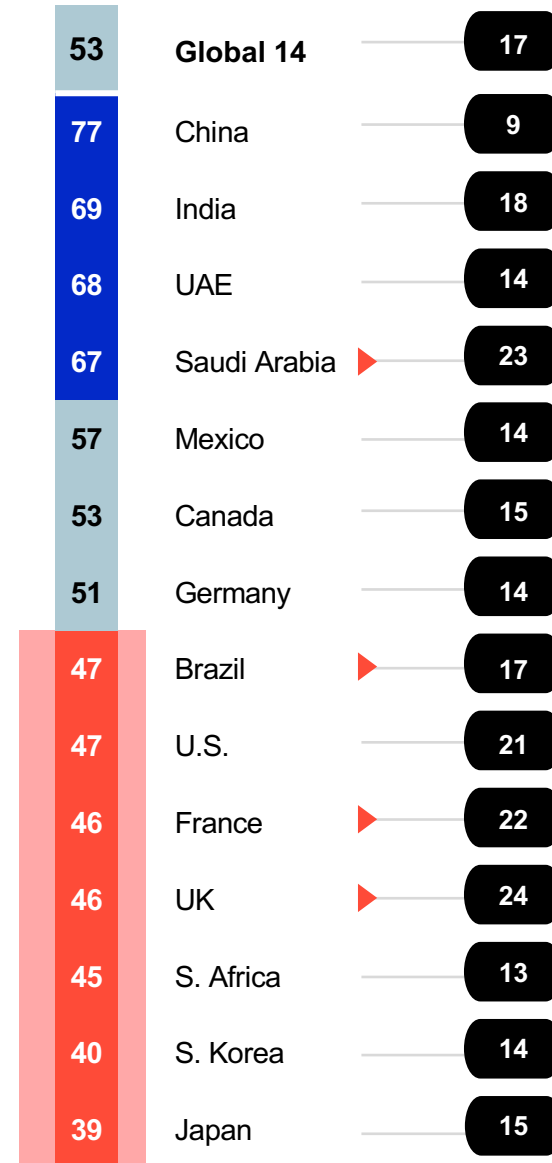
Double-digit trust inequality in 13 of 14 countries measured

2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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. Informed public and mass population, 14-mkt avg.

△ 2021 Spring Update  
Informed public



▲ 2021 Spring Update  
Mass population

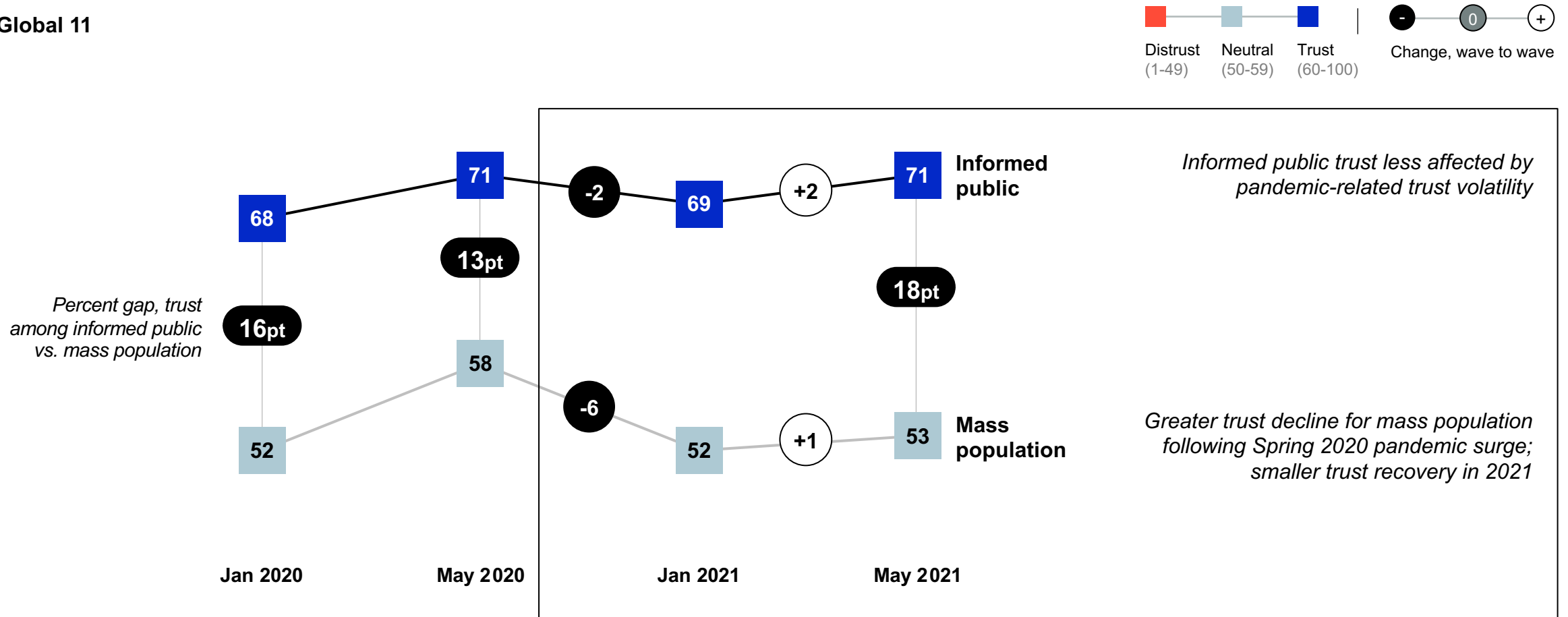


▶ 4 countries with record trust inequality

# A DEEPENING TRUST GAP

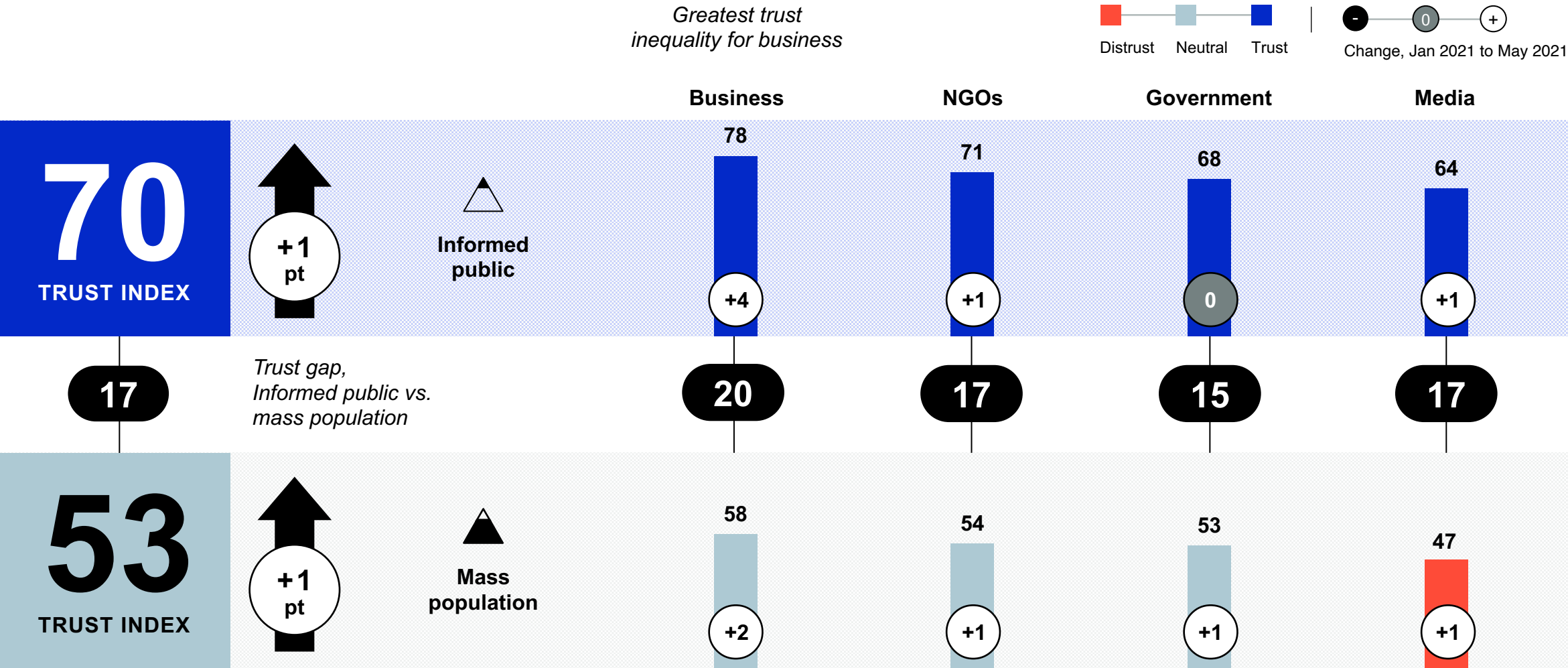
Percent trust

Global 11



# DOUBLE-DIGIT TRUST GAPS ACROSS INSTITUTIONS

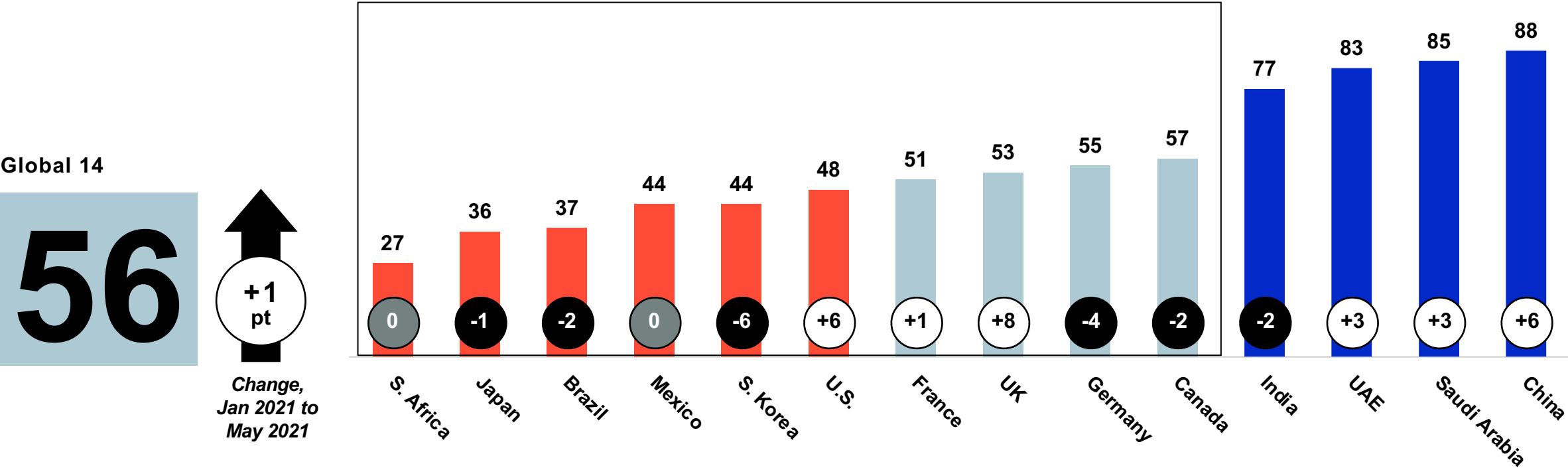
Percent trust



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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. Informed public and mass population, 14-mkt avg.

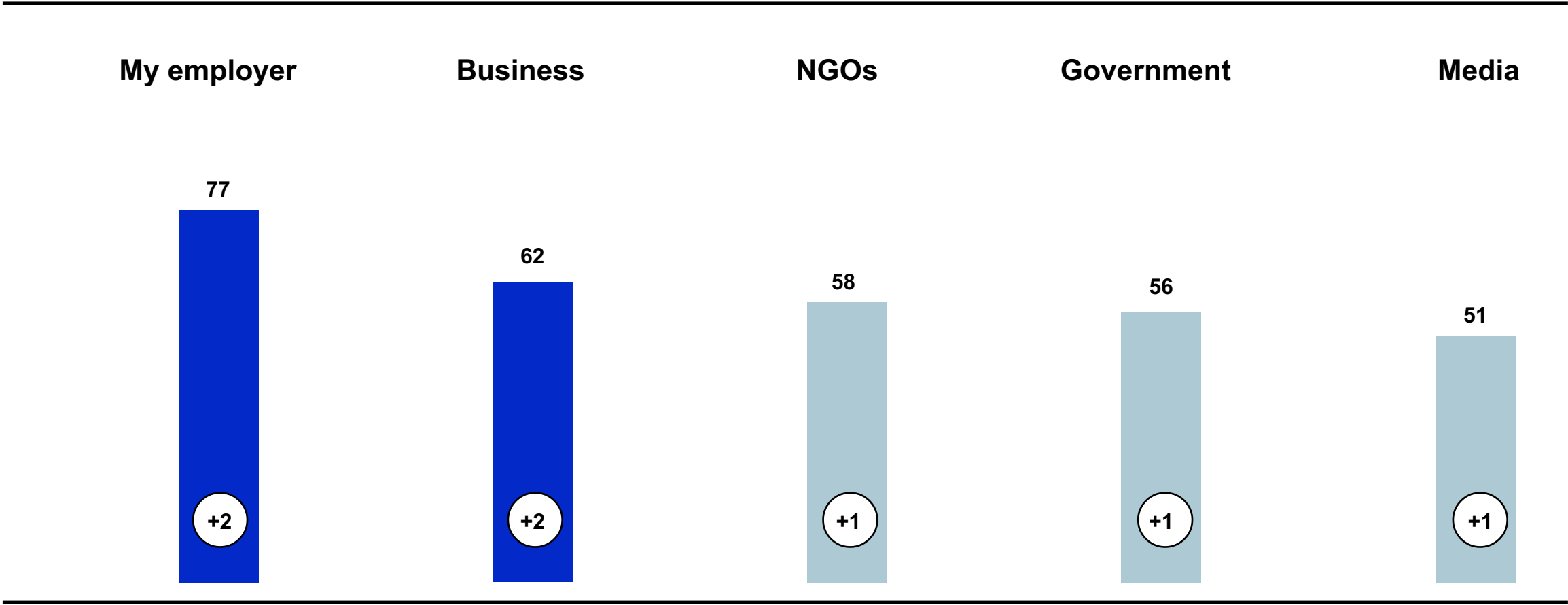
# GOVERNMENT NOT TRUSTED IN 10 OF 14 COUNTRIES

Percent trust



# MY EMPLOYER MOST TRUSTED INSTITUTION

Percent trust





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# **PANDEMIC LEGACY: A WORLD AWASH IN FEAR**

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# 12 OF 14 COUNTRIES STILL IN PANDEMIC MINDSET

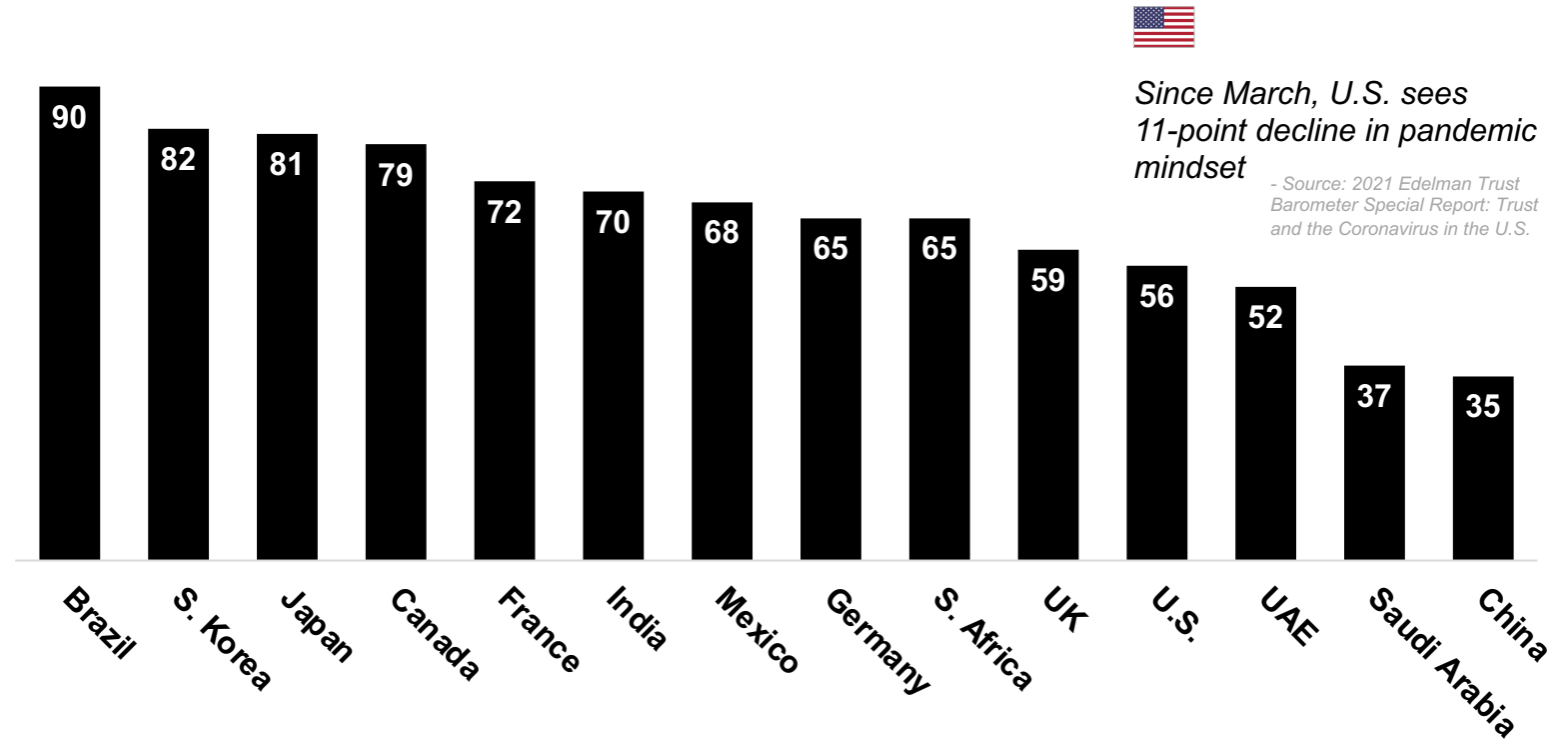
Which best describes how you are feeling?

Global 14

**65%** I am still in a pandemic mindset

VS

I feel that the pandemic is largely behind us and I am taking advantage of every opportunity I can to get back to my pre-pandemic life as quickly as possible



# EVEN THE VACCINATED DO NOT FEEL SAFE RESUMING NORMAL ACTIVITIES

Which would or do you feel safe doing right now?

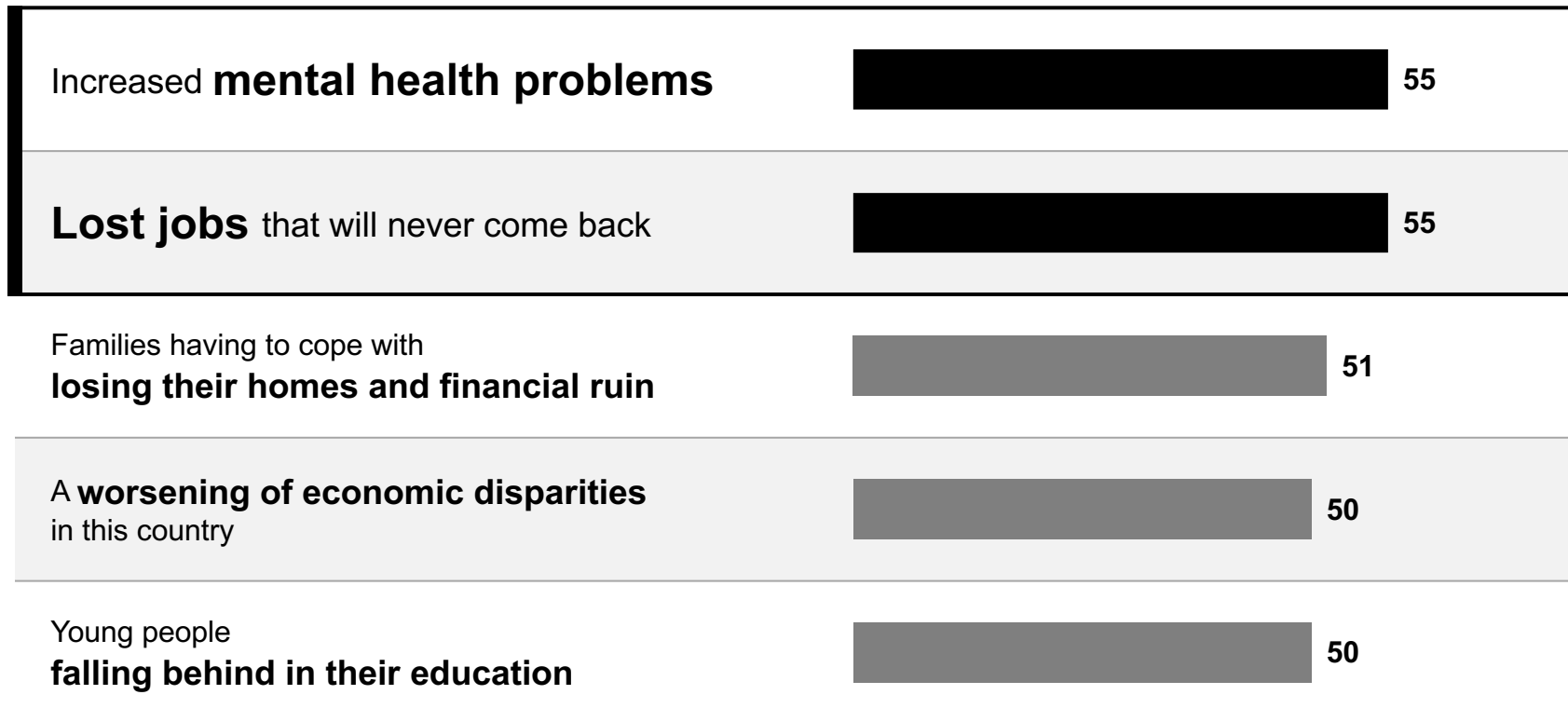
2021 Edelman Trust Barometer Spring Update: A World in Trauma. SAFE. Which of the following would you, or do you, feel safe doing right now. Pick all that apply. General population, 14-mkt avg., and by those who are "fully vaccinated" (VACCINE4/1).

		Among those who have been fully vaccinated
Shopping in stores	48	52
Going to doctors' offices	43	50
Going to my workplace	34	37
Dining indoors at restaurants	28	35
Staying at hotels	23	29
Sending kids to schools	22	25
Using public transportation	19	22
Flying commercial airlines	16	22

*Vaccination does not confer peace of mind about resuming normal activities*

# PANDEMIC FALLOUT: TWIN CRISES OF MENTAL HEALTH AND JOB LOSS

Percent who believe each will be among the worst negative consequences of the pandemic



2021 Edelman Trust Barometer Spring Update: A World in Trauma. WORSE. The pandemic is likely to have some lasting negative impacts on the lives of individuals and on our society as a whole. Which of the following do you believe will be among the worst long-term, negative consequences of the pandemic in addition to all of the lives lost? Pick all that apply. Question asked of half of the sample. General population, 14-mkt avg. "All of the above" added to each response.

# PANDEMIC FALLOUT: MORE PEOPLE NOW ALARMED BY CLIMATE, INFORMATION AND SUPPLY CHAIN THREATS

Percent who have always believed each is true, and percent who believe it is due to the pandemic

■ Have **always** believed this is true    ■ Pandemic has led me to believe this is true

## Climate change

needs to be taken more seriously  
as a threat to human life



## We are in the midst of an information crisis



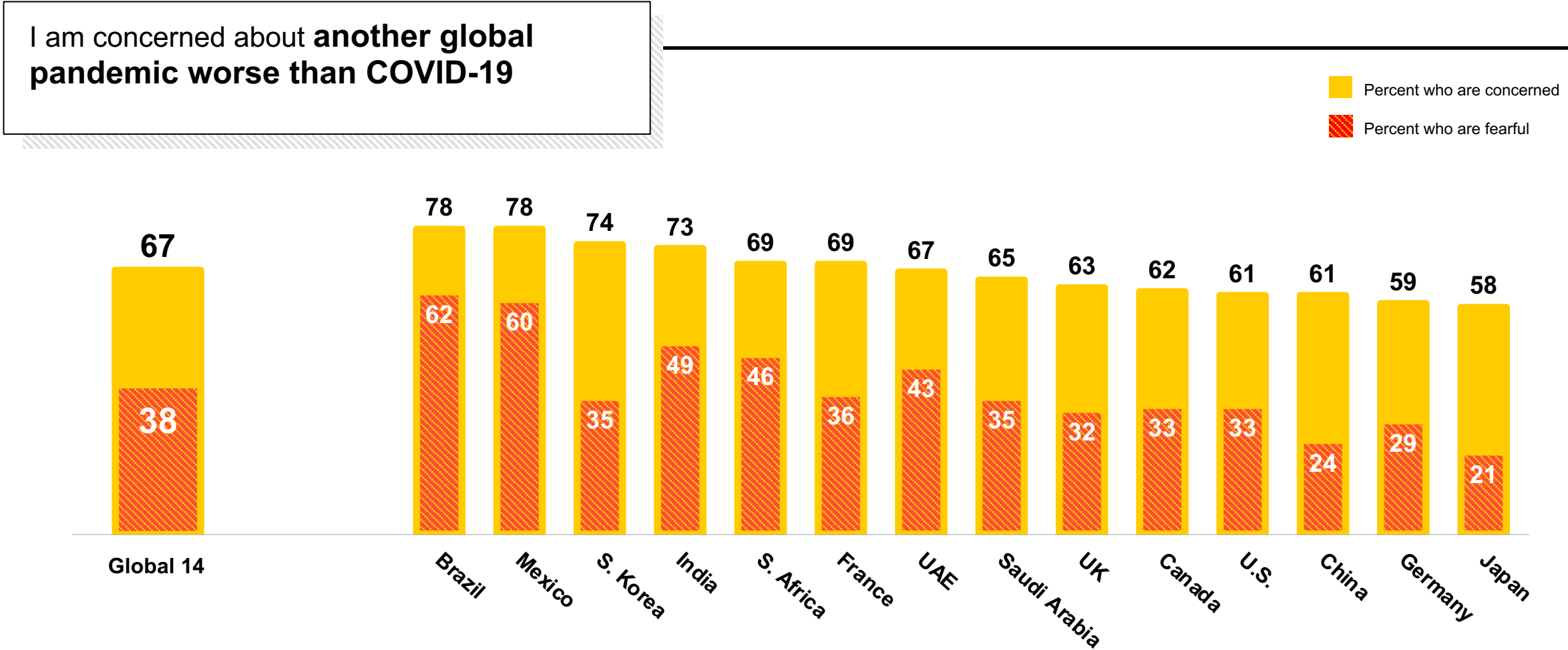
Our country is  
**too reliant on other countries**  
for essential products



2021 Edelman Trust Barometer Spring Update: A World in Trauma. LESSONS. Living through a global pandemic can give people a new perspective on things. For each of the items listed below, please indicate if this is something you felt was true before the pandemic began, something that the pandemic has led you to believe is true, or something that the pandemic has led you to believe is no longer true. 4-point scale; code 1, always believed to be true; code 2, believe to be true because of the pandemic. General population, 14-mkt avg.

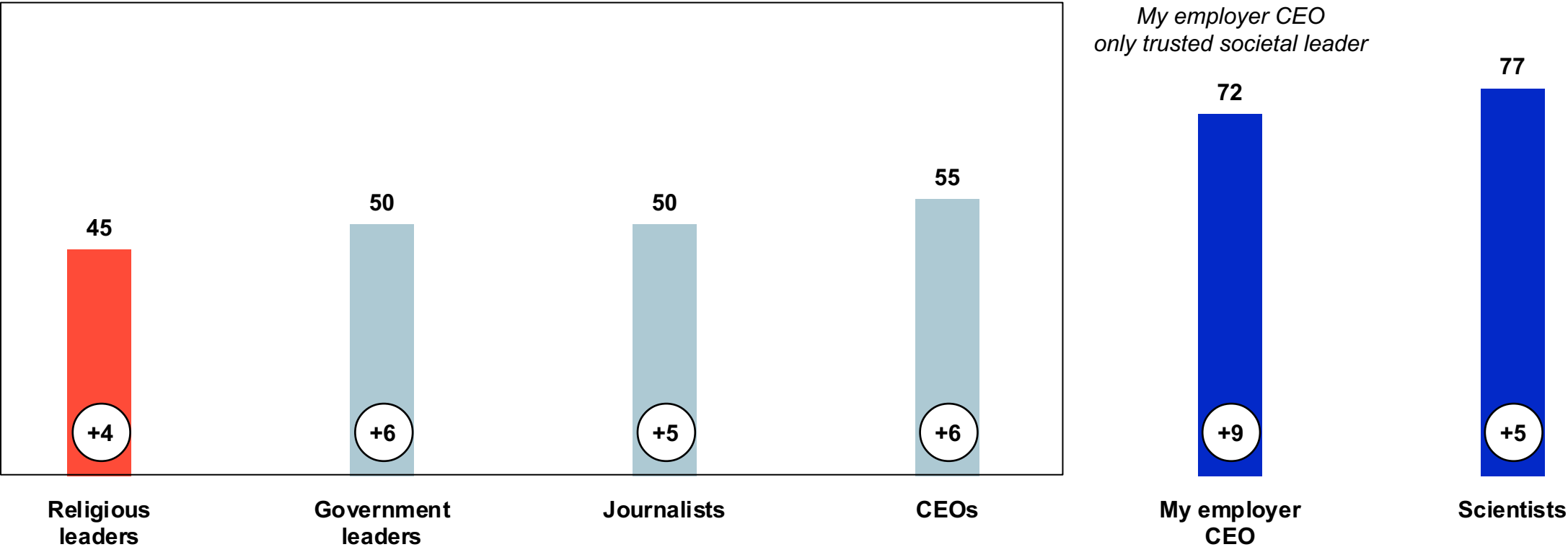
# NEARLY 7 IN 10 FEAR ANOTHER PANDEMIC

Percent who are concerned



# KEY SOCIETAL LEADERS NOT TRUSTED

Percent trust



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**NO END TO THE INFODEMIC**

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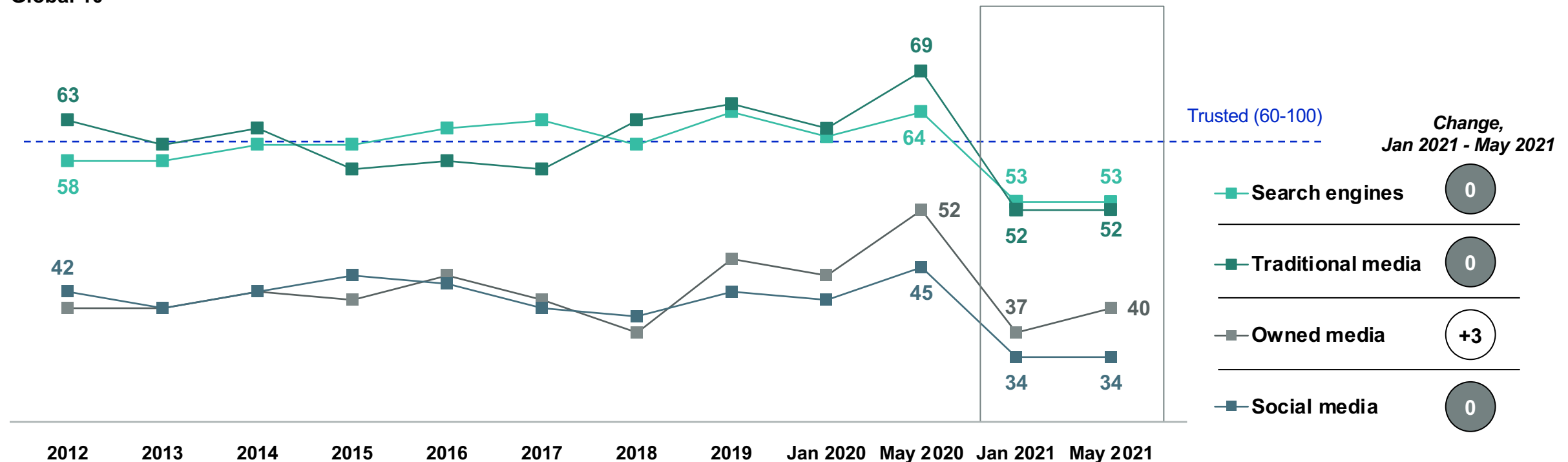


# TRUST IN NEWS SOURCES STILL AT RECORD LOWS; ONLY OWNED MEDIA GAINS IN TRUST

Percent trust in each source for general news and information

● 0 ● + Change, Jan 2021 to May 2021

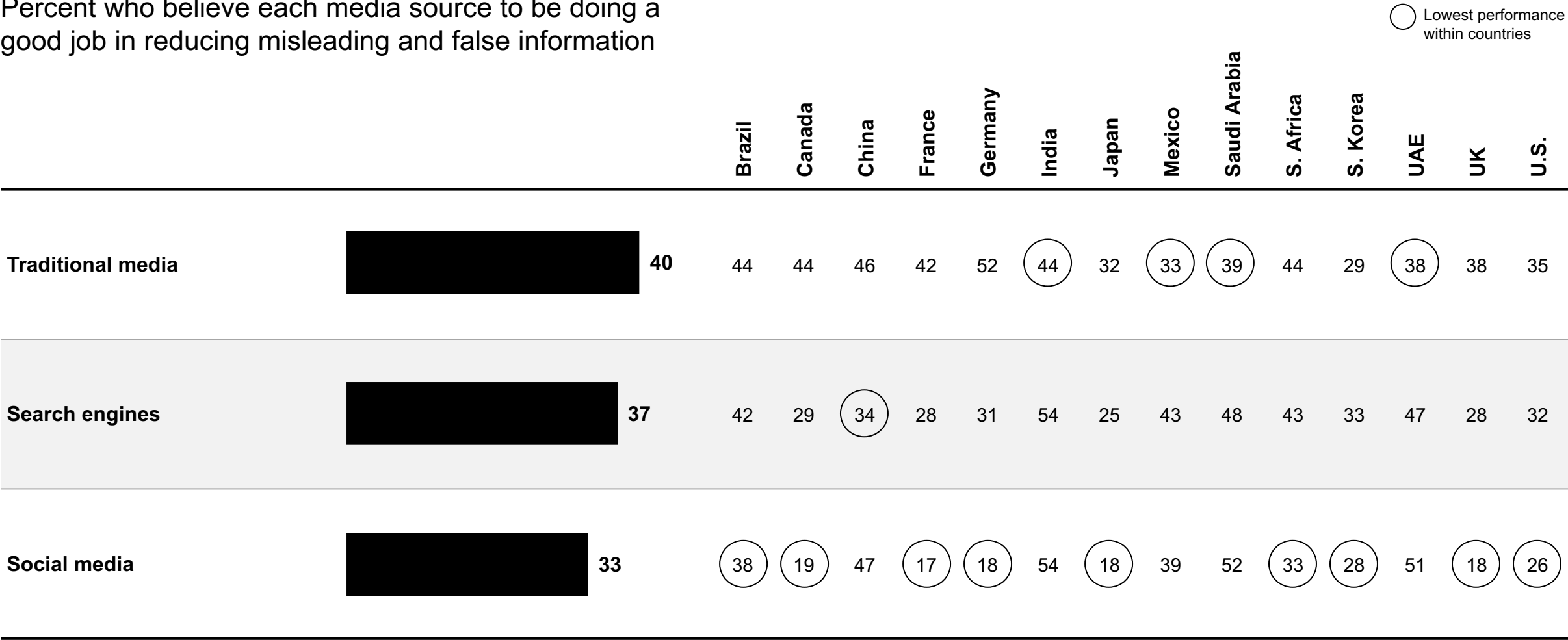
Global 10



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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, 10-mkt avg.  
\*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

# MEDIA FAILS TO IMPROVE INFORMATION QUALITY

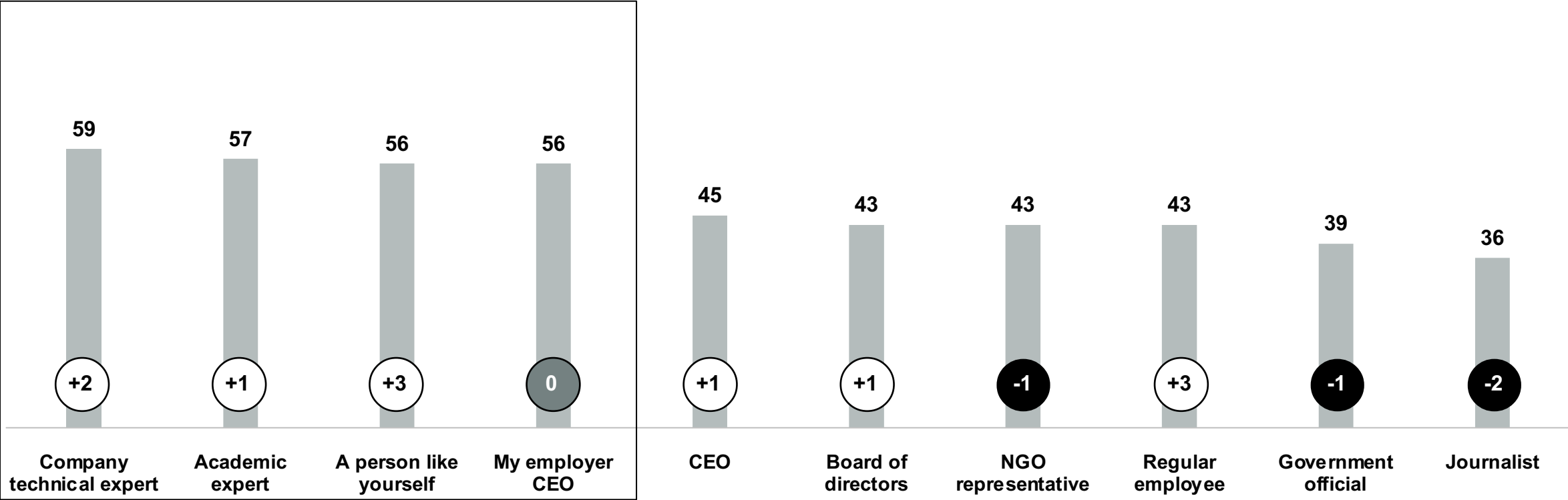
Percent who believe each media source to be doing a good job in reducing misleading and false information



# EXPERTS, PEERS, EMPLOYER CEOS MOST CREDIBLE SPOKESPEOPLE

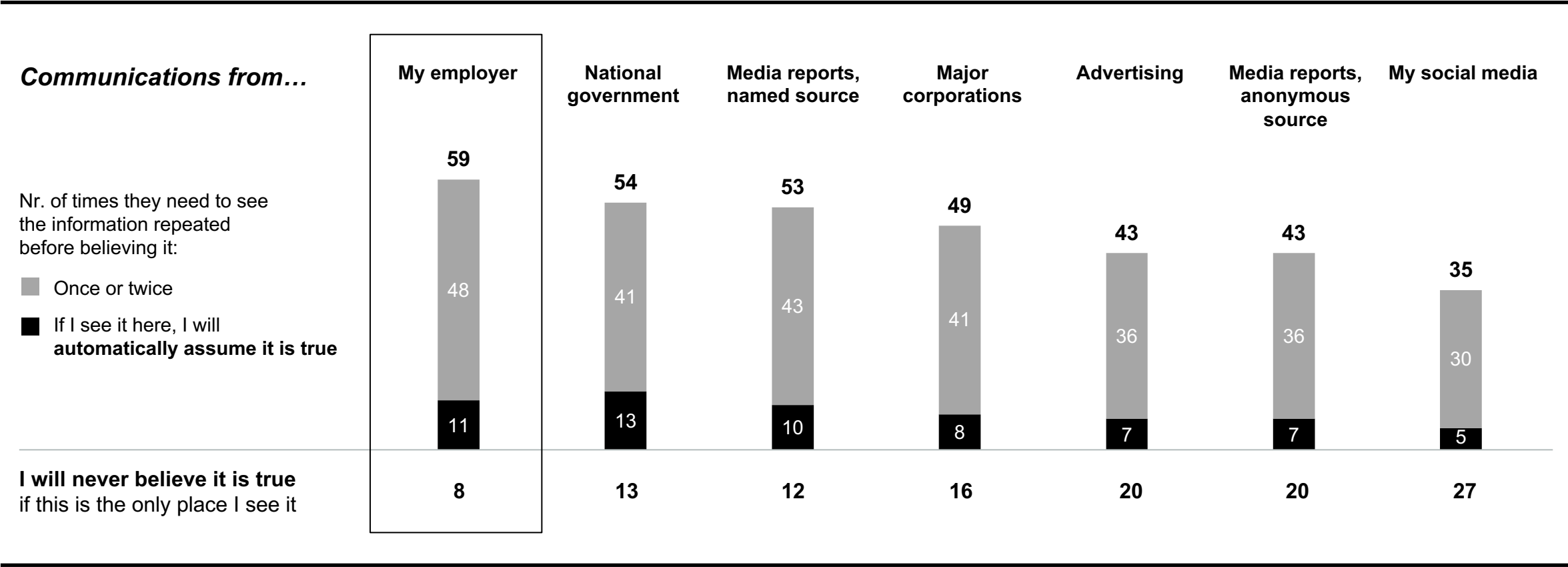
Percent who rate each as very/extremely credible  
as a source of information **about a company**

Change, Jan 2021 to May 2021



# EMPLOYER MEDIA MOST BELIEVABLE

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



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**GOVERNMENT UNDERPERFORMS**

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# BUSINESS OUTPERFORMS GOVERNMENT ACROSS SOCIETAL CHALLENGES

Percent who say institutions are doing well on each

	Business	Government	<i>Performance gap, business vs. government</i>
Driving <b>economic growth</b> and job creation	45	35	<b>10</b>
Responding to the health and public safety aspects of the <b>COVID-19 pandemic</b>	45	40	<b>5</b>
Guarding <b>information quality</b>	39	34	<b>5</b>
Addressing <b>systemic inequalities</b>	35	30	<b>5</b>
Improving our <b>healthcare system</b>	39	37	<b>2</b>
Ensuring our <b>education system</b> is preparing people for jobs of the future	36	34	<b>2</b>
Addressing <b>climate change</b>	34	32	<b>2</b>

*Business seen as doing better than government across all societal challenges*

2021 Edelman Trust Barometer Spring Update: A World in Trauma. PER\_BUS. How well do you feel business is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; top 2 box, doing well. Question asked of half the sample. PER\_GOV. How well do you feel the government is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; top 2 box, doing well. Question asked of half the sample. General population, 14-mkt avg.

# ONLY GOVERNMENT LEADERS SEEN AS LESS HONEST AND CREDIBLE THAN A YEAR AGO

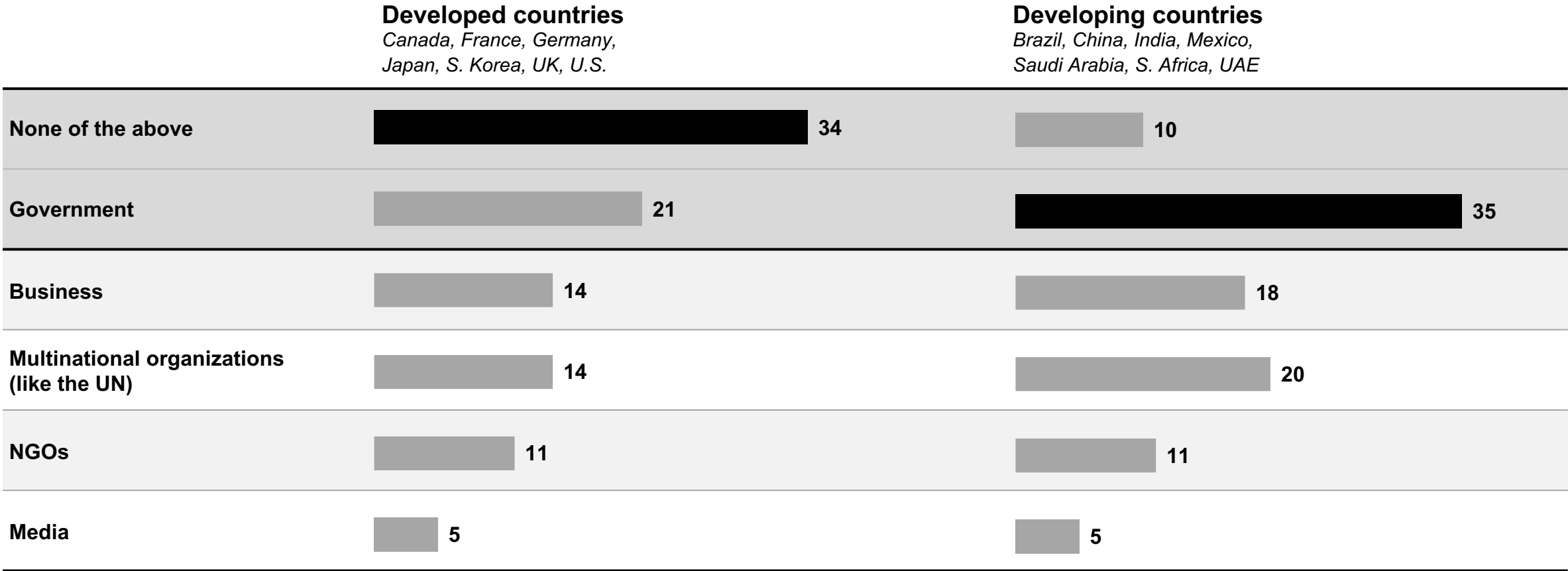
Percent who say their perception of the honesty and credibility of each has stayed high, increased or decreased in the last year

2021 Edelman Trust Barometer Spring Update: A World in Trauma. CRISIS\_CRED. Comparing your feelings now to what they were a year ago, how has your perceptions of the honesty and credibility of these leaders changed or not based on what they have said and how they have acted since the start of the pandemic. Please indicate your answer using the 4-point scale below. 4-point scale; code 1, remained high over the past year; code 3, significantly increased over the past year; code 4, significantly decreased over the past year. Question asked of half of the sample; “My employer CEO” only asked of those who are an employee (Q43/1). General population, 14-mkt avg.

	Was high and <i>stayed high</i>	Was low, but significantly <i>increased</i>	Was high, but significantly <i>decreased</i>
Doctors and healthcare providers	<div></div> 38	29	8
Academics and scientists	<div></div> 32	27	10
My employer CEO	<div></div> 27	24	12
Global health authorities (WHO, CDC)	<div></div> 24	23	19
National government leaders	<div></div> 20	19	23
State or local government leaders	<div></div> 19	21	23
CEOs and business leaders	<div></div> 17	22	14

# GLOBAL DIVERGENCE ON WHETHER GOVERNMENT CAN BE TRUSTED TO LEAD

Percent who trust each institution to lead the world into a better future





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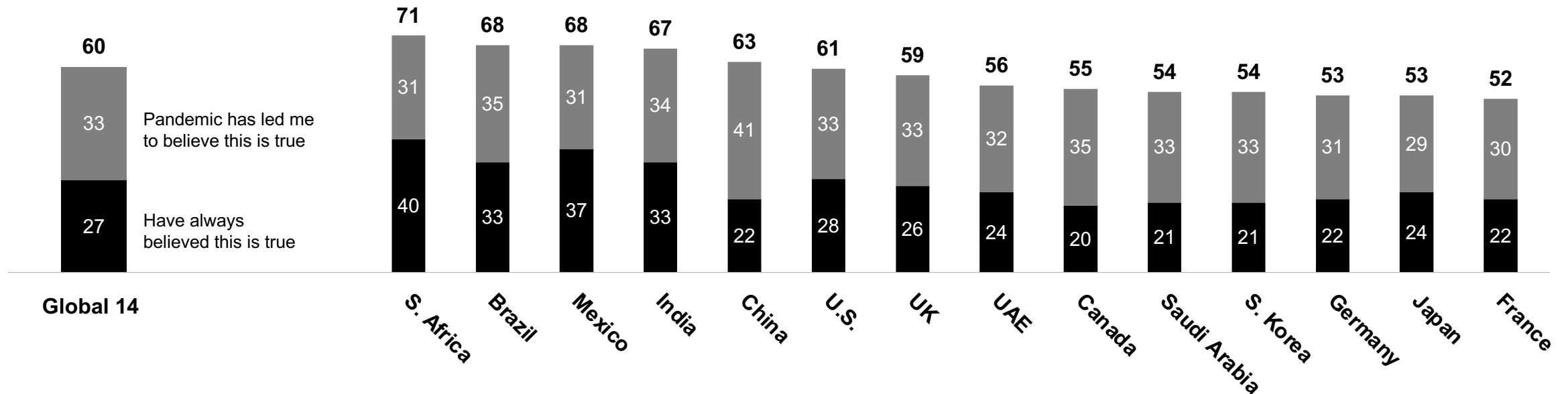
**BUSINESS:  
BURDENED BY  
GREAT EXPECTATIONS**

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# PRESSURE MOUNTS FOR BUSINESS TO TAKE ON SOCIETAL CHALLENGES

Percent who have always believed this is true, and percent who believe it is due to the pandemic

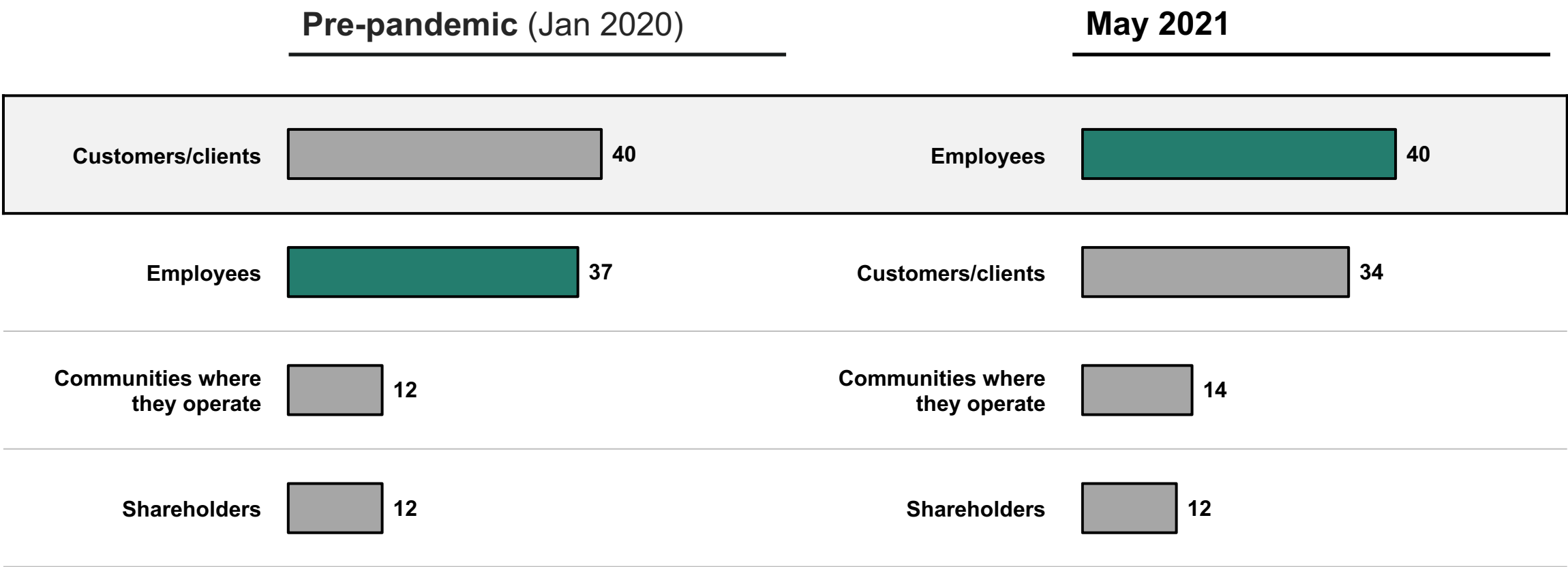
Our country will not be able to overcome our challenges **without business' involvement**



2021 Edelman Trust Barometer Spring Update: A World in Trauma. LESSONS. Living through a global pandemic can give people a new perspective on things. For each of the items listed below, please indicate if this is something you felt was true before the pandemic began, something that the pandemic has led you to believe is true, or something that the pandemic has led you to believe is no longer true. 4-point scale; code 1, always believed to be true; code 2, believe to be true because of the pandemic. General population, 14-mkt avg.

# EMPLOYEES NOW MOST IMPORTANT STAKEHOLDER

Percent who ranked each group as most important to a company achieving long-term success



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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. Question asked of half of the sample. General population, 14-mkt avg.

# NEARLY 8 IN 10 EMPLOYEES EXPECT THEIR COMPANY TO ACT ON SOCIETAL ISSUES

Percent of employees who expect their employer to take one or more actions on each issue:

Vaccine hesitancy	84
Climate change	81
Automation	79
Infodemic	79
Racism	79
Immigration and border security	70

on average,

79%

of employees expect their employer to take action

# PUBLIC EXPECTS CEOS TO PRIORITIZE SOCIETAL ISSUES EVEN MORE

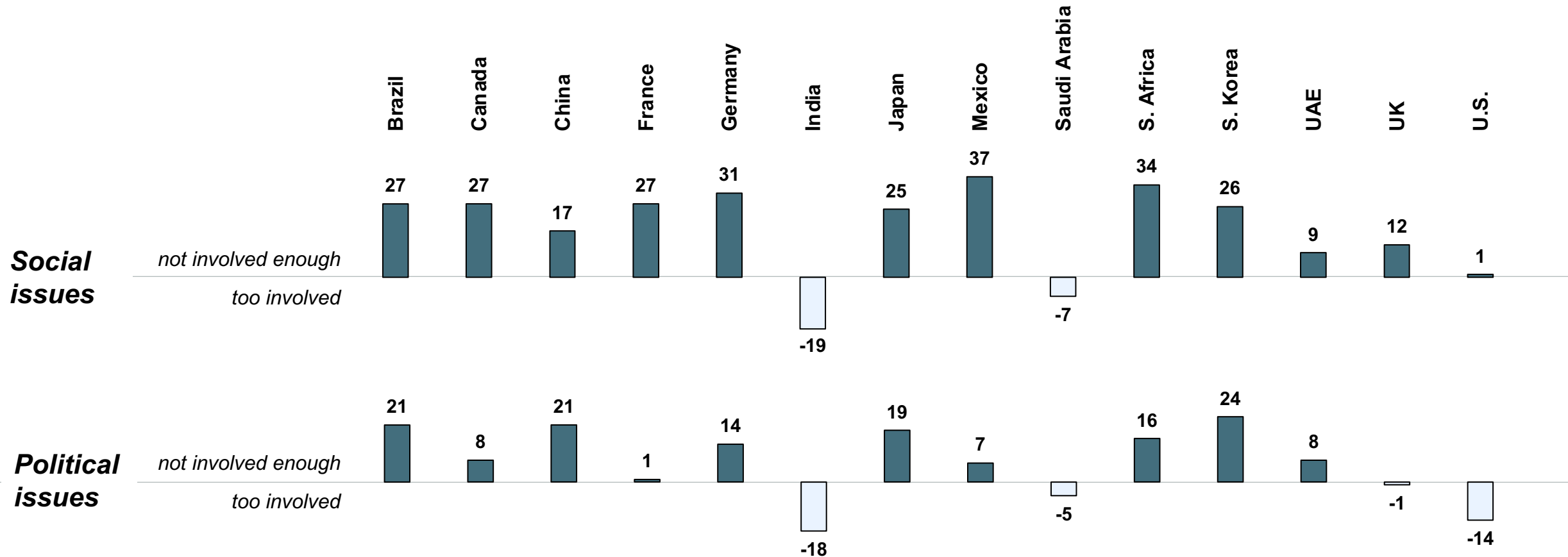
Percent who feel that  
CEOs need to be making a higher priority than they currently are

	Global 14	Brazil	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	UK	U.S.
Majority feel this way															
Over a third feels this way															
Gender and ethnic <b>pay equality</b>	51	58	57	42	55	51	48	40	56	45	65	39	50	50	52
Ensure their company is <b>trusted</b>	42	59	47	30	33	44	36	21	48	37	58	44	42	48	42
Ensure their company is paying its <b>fair share of taxes</b>	40	42	51	27	49	43	33	29	40	27	50	36	30	52	47
Reduce their <b>carbon footprint</b>	40	47	48	30	50	46	30	33	50	28	49	39	36	43	37
Ensure their company's <b>workforce is inclusive</b> and diverse	30	35	35	31	25	21	28	20	28	26	43	30	30	37	34
Increase their company's <b>profits and stock price</b>	21	18	19	23	12	11	24	19	17	27	25	30	27	19	25

2021 Edelman Trust Barometer Spring Update: A World in Trauma. CEO\_BETTER. Below is a list of potential expectations that you might have for a company CEO. Which ones do you feel that CEOs in general need to be making a higher priority than they currently are? Pick all that apply. Question asked of half of the sample. General population, 14-mkt ag. "Gender and ethnic pay equality" is a net of attributes 10 and 11.

# MORE SUPPORT FOR CEOS TO PRIORITIZE SOCIAL THAN POLITICAL ISSUES

Percentage point difference between those who say CEOs are not involved enough vs. too involved in social and political issues



2021 Edelman Trust Barometer Spring Update: A World in Trauma. CEO\_ENGAGES. In general, how would you characterize CEOs' current level of involvement in social issues? Question asked of half of the sample. CEO\_ENGAGEP. In general, how would you characterize CEOs' current level of involvement in political issues? Question asked of half of the sample. General population, by market.

# PANDEMIC UNLOCKS OPPORTUNITY FOR A BETTER FUTURE

Which do you agree with more?

Nothing good will come from this pandemic. It will ruin lives, further divide us as a society, and drain resources that could have been used to address other social problems.

36%

OR

As horrible as it is, **this pandemic will lead to valuable innovations** and changes for the better in how we live, work and treat each other

64%

Percent who say each is a positive change they believe will result from the pandemic

Improvements to our <b>healthcare system</b>	57
<b>Greater preparedness</b> for future pandemics	55
<b>Innovations</b> around how we work	47
Accelerated <b>development of technologies</b>	39
More attention on <b>climate change</b>	37

2021 Edelman Trust Barometer Spring Update: A World in Trauma. PER\_CHOICE. You are about to see a series of two choices. For each pair, we want you to choose the one that you agree with more. BETTER. You just indicated that you believe that the pandemic will lead to some changes for the better. Which of the following do you believe will be included in those positive changes? Pick all that apply. Question asked of those who said, “living through the pandemic will lead to changes for the better” (PER\_CHOICE/2). General population, 14-mkt avg.

# TOWARD A POST-PANDEMIC WORLD

1

## **Beware the pedestal**

*Business has proven itself invaluable in the pandemic but can't solve all societal problems on its own.*

2

## **Lean into comparative advantage**

*Business must make choices and lead where they have expertise—jobs, training, fair wages and innovation—and continue to take action on inclusion and sustainability.*

3

## **Employees are now job one**

*Business must prioritize employees, now their most important stakeholder.*

4

## **Government must lead on foundational challenges**

*Government involvement is essential on broad societal issues such as vaccination, return to workplace, privacy, income inequality and climate change.*



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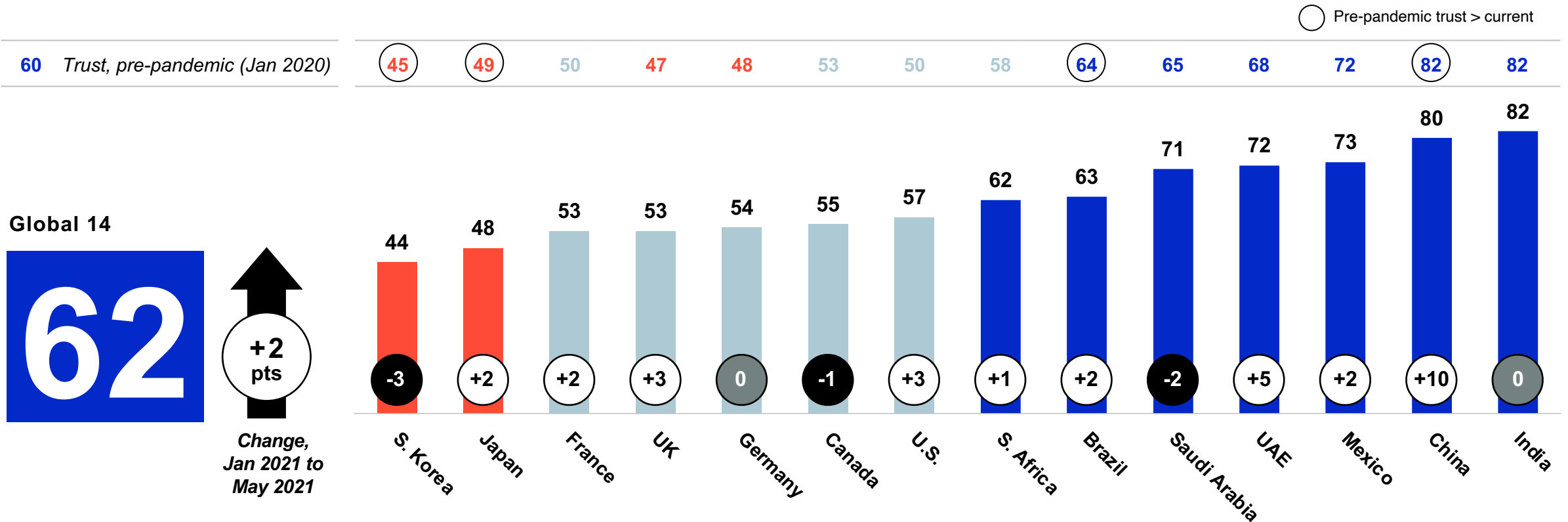
# **SUPPLEMENTAL DATA**

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Since January 2021...

# TRUST IN BUSINESS INCREASES IN 9 OF 14 COUNTRIES

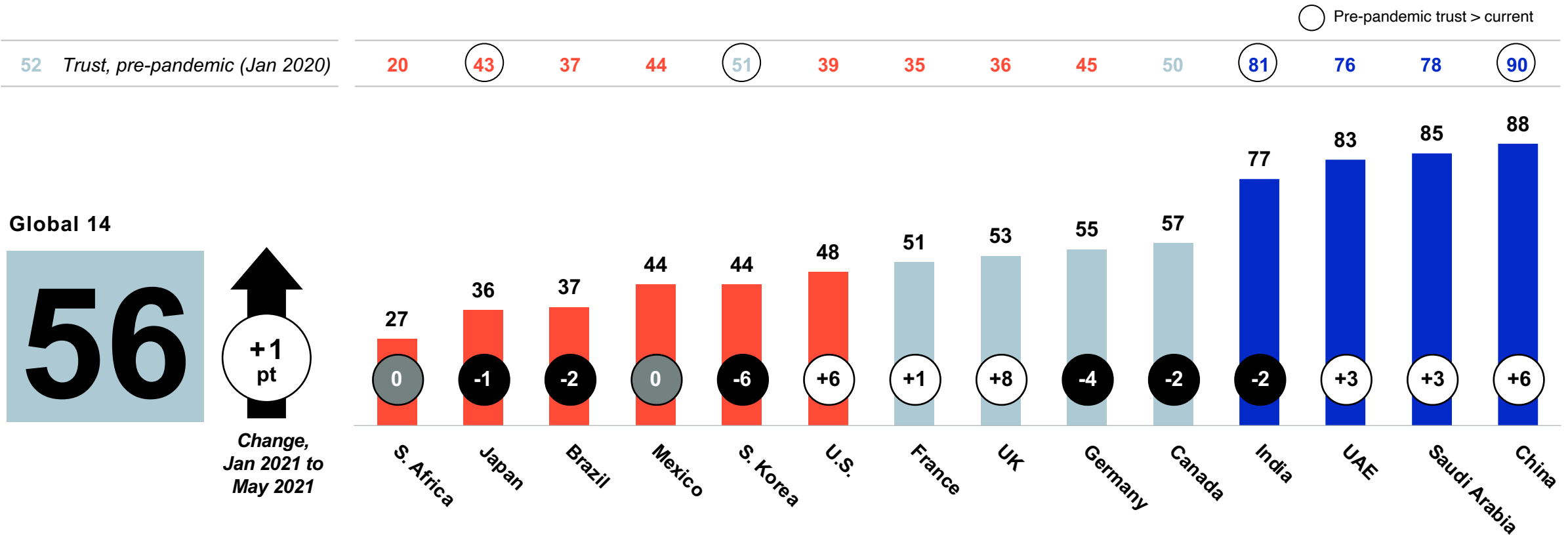
Percent trust



Since January 2021...

# GOVERNMENT NOT TRUSTED IN 10 OF 14 COUNTRIES

Percent trust



Since January 2021...

# TRUST IN MY EMPLOYER INCREASES IN 8 OF 14 COUNTRIES

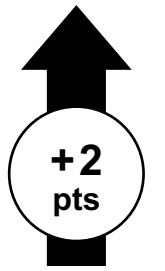
Percent trust



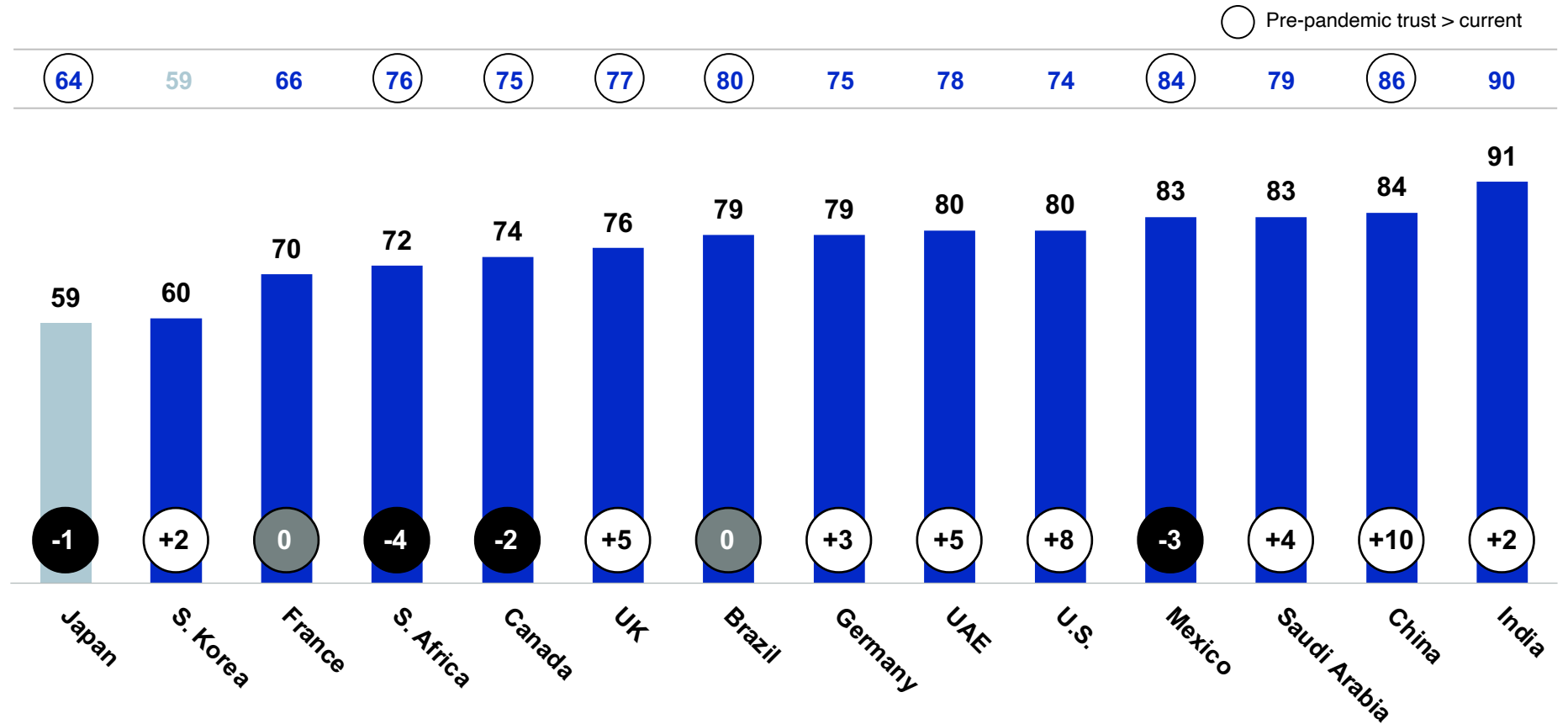
## Global 14

77 Pre-pandemic (Jan 2020)

## Global 14



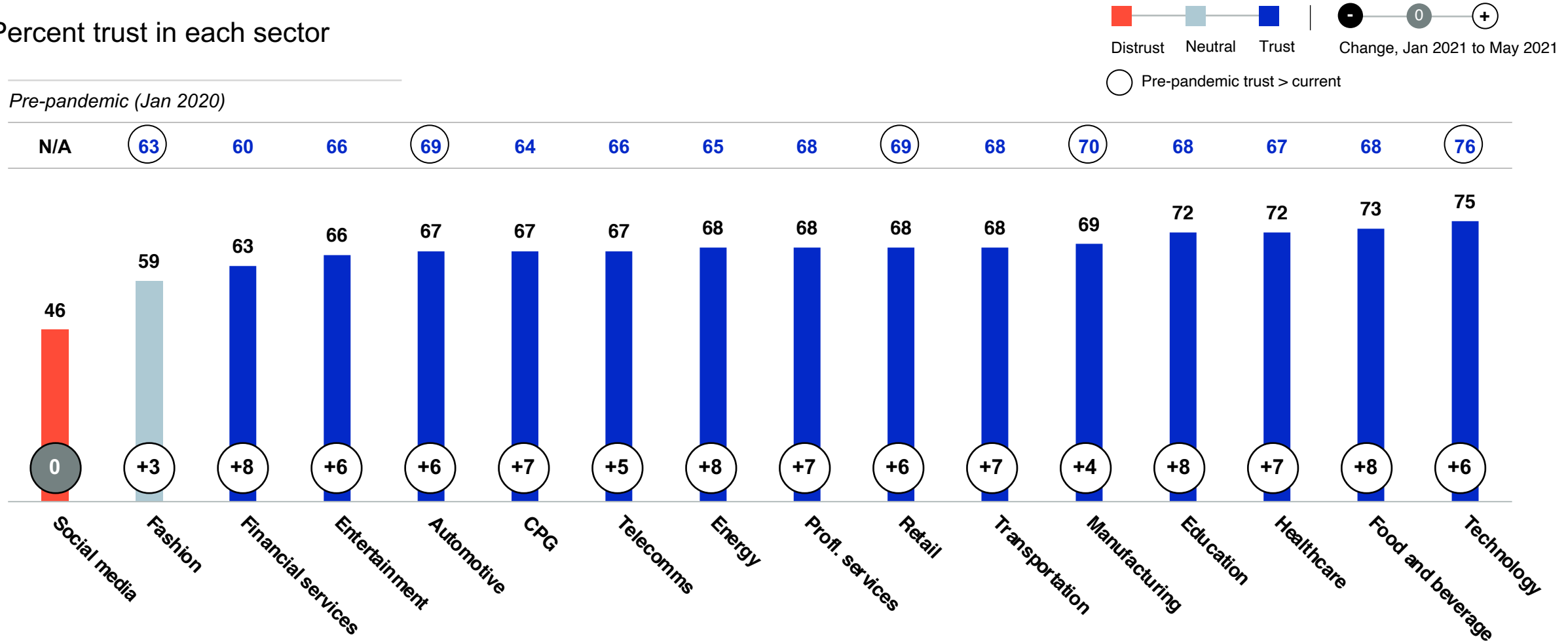
Change,  
Jan 2021 to  
May 2021



Since January 2021...

# MOST INDUSTRY SECTORS AT OR ABOVE PRE-PANDEMIC TRUST LEVELS

Percent trust in each sector



Since January 2021...

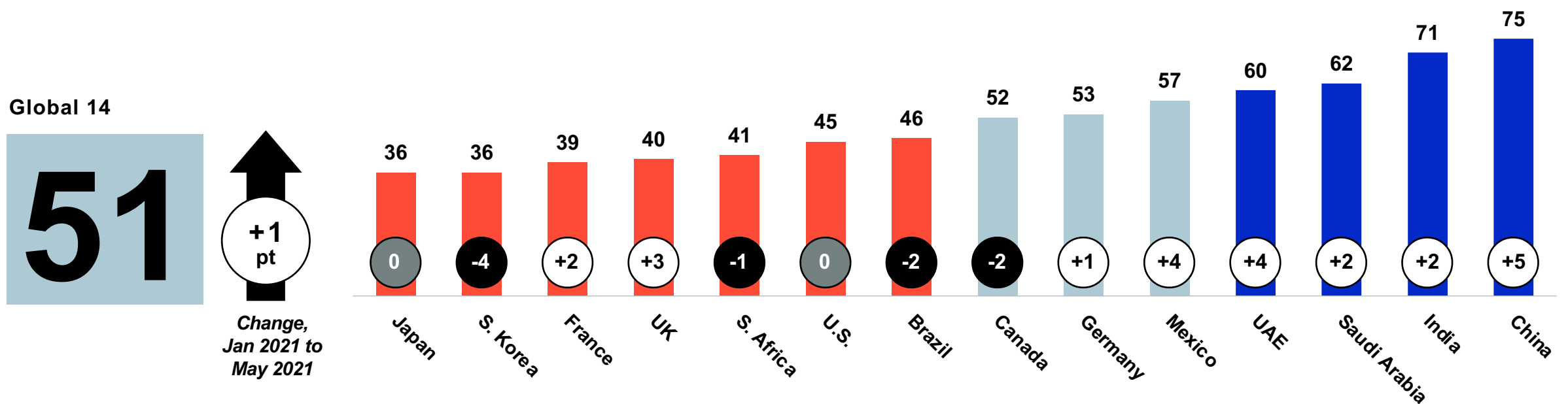
# TRUST IN MEDIA INCREASES IN 8 OF 14 COUNTRIES

Percent trust



○ Pre-pandemic trust > current

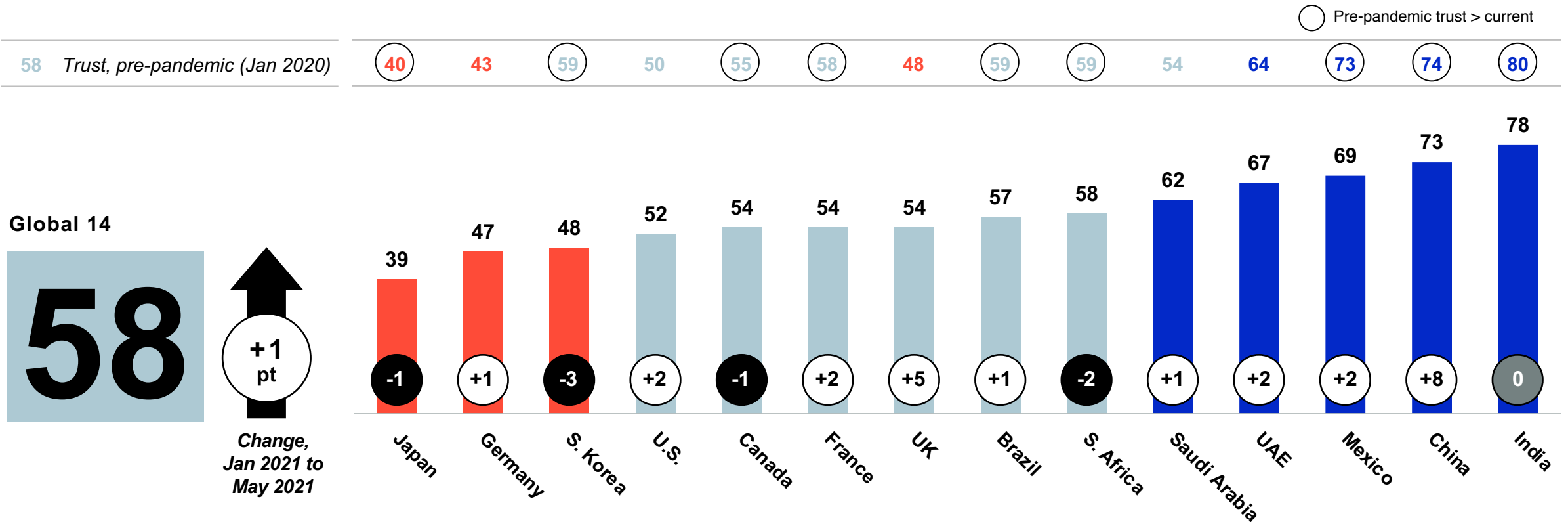
50 Trust, pre-pandemic (Jan 2020)



Since January 2021...

# TRUST IN NGOS INCREASES IN 9 OF 14 COUNTRIES

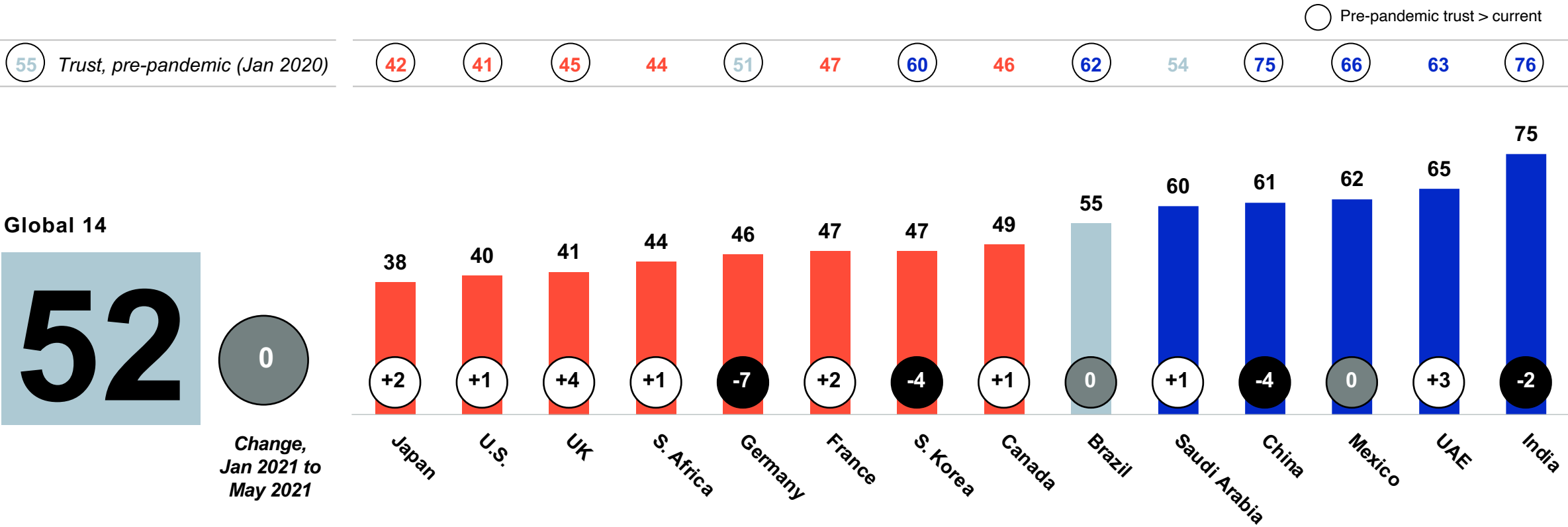
Percent trust



Since January 2021...

# TRUST IN THE EU INCREASES IN 8 OF 14 COUNTRIES

Percent trust

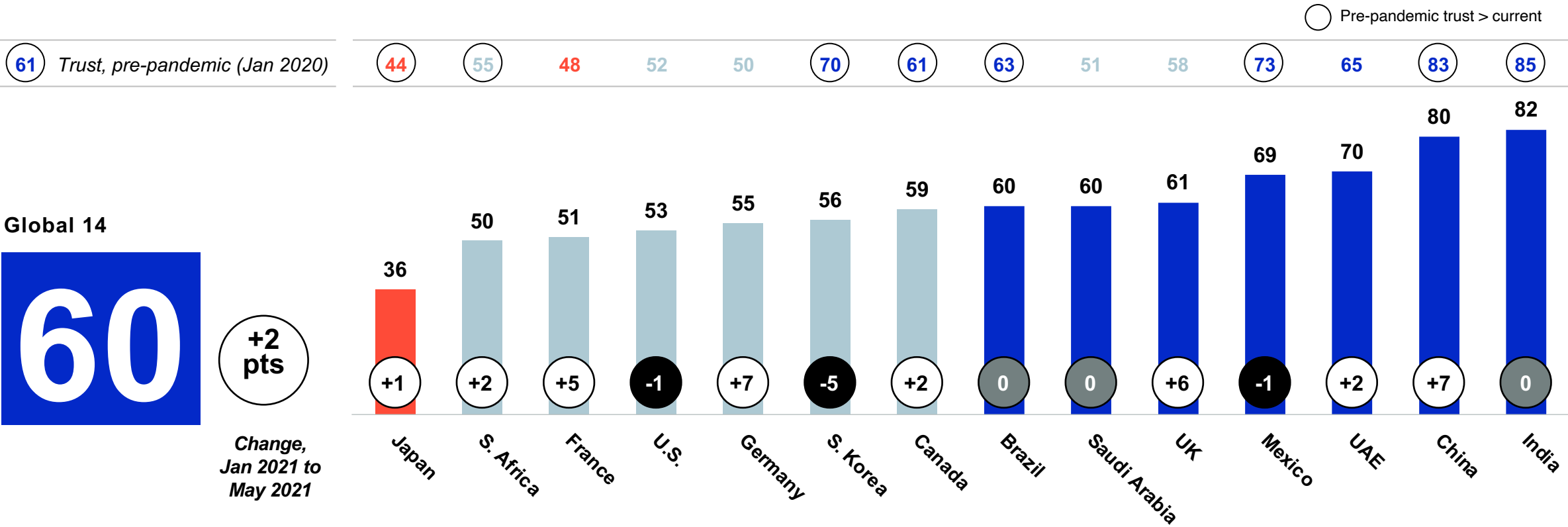




Since January 2021...

# TRUST IN THE UN INCREASES IN 8 OF 14 COUNTRIES

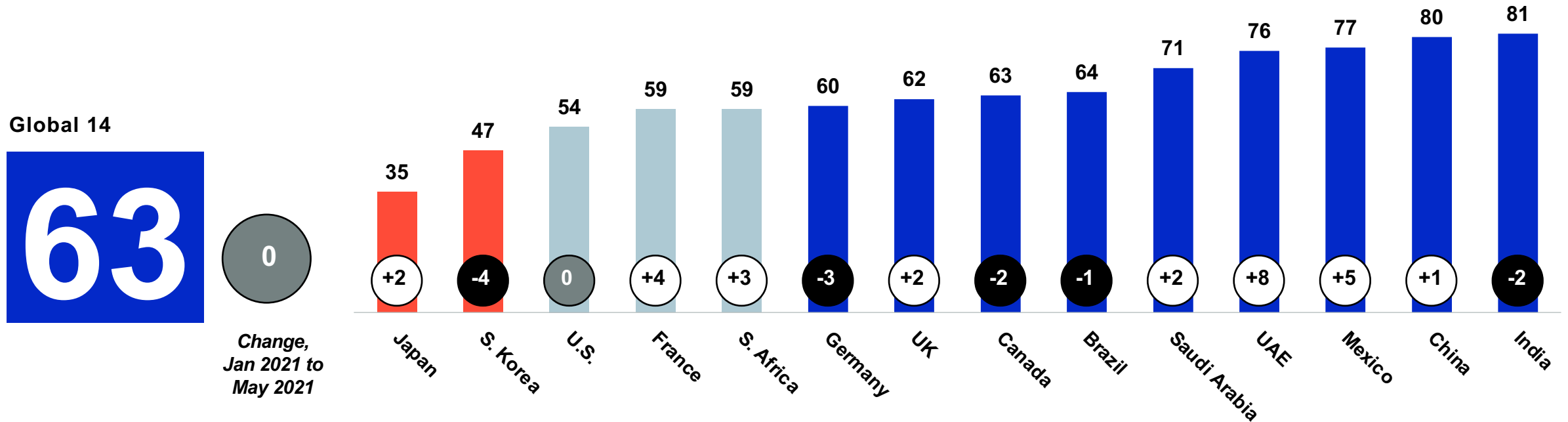
Percent trust



Since January 2021...

# TRUST IN THE WORLD HEALTH ORGANIZATION INCREASES IN 8 OF 14 COUNTRIES

Percent trust



Since January 2021...

# TRUST IN NATIONAL HEALTH AUTHORITIES INCREASES IN 8 OF 14 COUNTRIES

Percent trust

