2026 Edelman Trust Barometer

Special Report:
Brand Growth in an Insular World

Edelman
Trust Institute

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World

METHODOLOGY

Annual online survey in its 8th year

Fieldwork conducted: April 23 – May 11, 2026

15
Countries

17,688
Respondents

1,200+/-
Respondents per country*

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

Data collected is representative of the general population across age, gender, and region within each country.**

*The sample size varies by country, from 1,121 to 1,200.

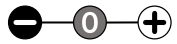
**Data also representative across nationality in Saudi Arabia and UAE, and race/ethnicity in the UK and U.S.

Margin of error for full general population 15-market global average: +/- 1.0 percentage points.
Margin of error for full general population country averages: +/- 3.7 to 3.8 percentage points (varies by country).
Margin of error is calculated at the 99% confidence level.

Global averages

Unless otherwise indicated, global averages are composed of all 15 countries surveyed.

Statistical significance



Significant change

Indicates a statistically meaningful difference or change in the data that is unlikely to be due to chance or a random fluctuation.

All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level.

Shortened question text

Throughout the report, question text has been edited for readability.

For more details on the margin of error, global averages, country-specific sample information, questions asked to partial sample, or to see the full text for any shortened statements, please see the Technical Appendix.

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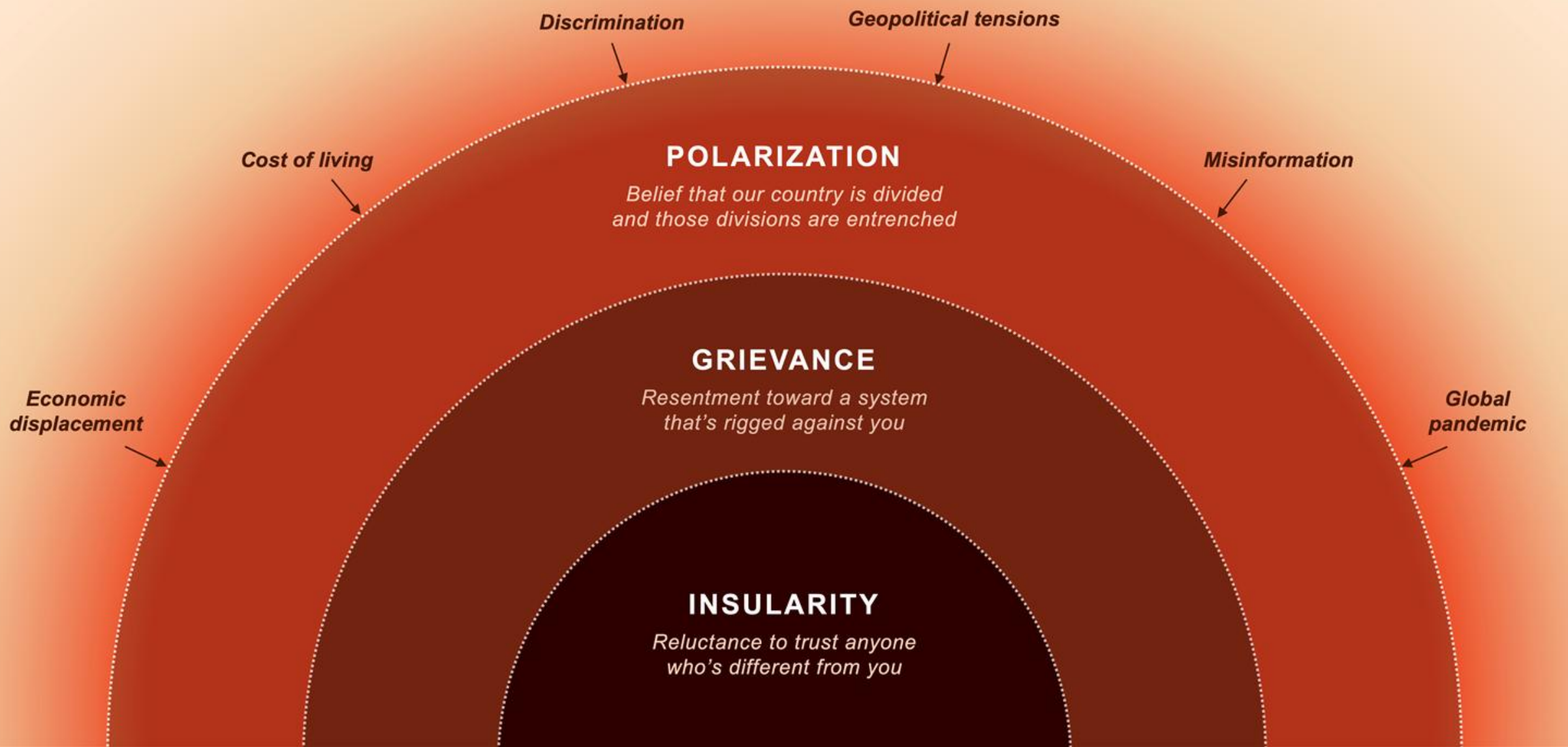
The Retreat Into Insularity



Inflation, Job Loss, and Misinformation Fears Undermine Sense of Stability

Percent who say

GLOBAL 14 excl. China

I worry about …

Not being able to **afford things I need** because of inflation

71%

Losing my job or having my hours reduced *(among employees)*

66%

Being able to **find trustworthy information** about important issues

65%

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. PERS_EMO. How much do you worry about each of the following? 9-point scale; top 4 box, worried. Question asked to partial sample, and "Losing my job or having my hours reduced" was only asked to those who are employees of an organization (Q43/1). General population, 14-mkt avg., excluding China.

The New Market Reality: 2 in 3 Have an Insular Trust Mindset

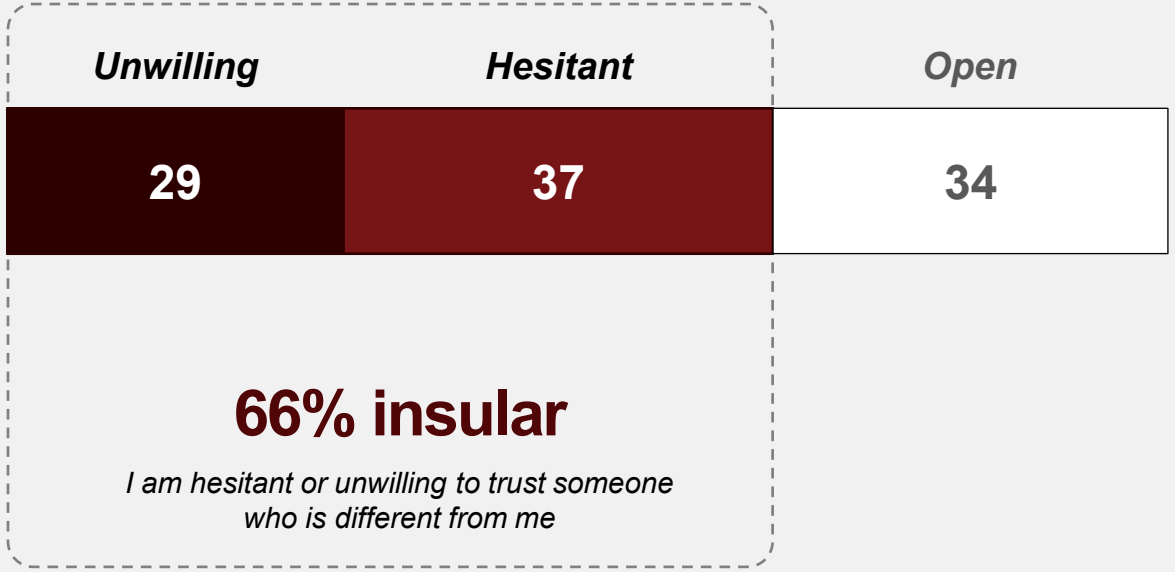
On average, percent who say

GLOBAL 15

When it comes to **trusting someone who:**

- *Lives by **different core values** than me*
- *Believes **different facts** and trusts **different sources** than I do*
- *Wants to address **societal problems differently** than I do*
- *Has a **different culture, background, or lifestyle** than mine*

I am generally …



Those with Insular Trust Mindset Reject Brands That Cater to Those Who Are Different From Them

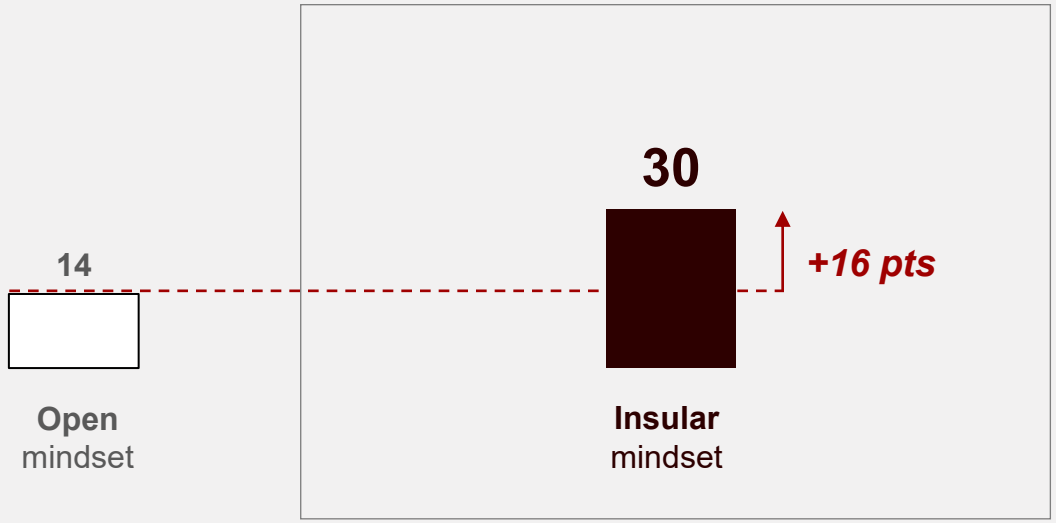
On average, percent who say

GLOBAL 15

I am **unwilling to use brands** that are **used by people who:**

- *Live by **different core values** than me*
- *Believe **different facts** and trusts **different sources** than I do*
- *Want to address **societal problems differently** than I do*
- *Have a **different culture, background, or lifestyle** than mine*

Insularity increases unwillingness to use brands associated with people different from them



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. INS_USE_1-4. We want to know whether you would use brands that are mainly used by or associated with people who [live by different core values; have different solutions to societal problems; have different facts they rely on; have different culture, life experiences, or backgrounds] than you. Please read through the following scenarios and indicate for each whether you would or would not be willing to use, or continue using, the brand being described. 5-point scale; bottom 2 box, somewhat or very unwilling. Data shown is the average across the four dimensions of difference. For each dimension, data was netted to measure all who selected very or somewhat unwilling at any of the three offered scenarios. The scenarios included: the brand is very good at solving your specific problems and satisfying your needs, but is primarily used by people with this difference; a brand that other people would see you using in public that is primarily associated with people with this difference; a brand you currently use that decides to start selling its products to people with this difference. Questions asked to partial sample. General population, 15-mkt avg., by insularity segments. For a full explanation of how this analysis was done and how the insularity segments were created, please see the Technical Appendix.

The Path to Mass Appeal Becomes More Difficult for Brands

Diffusion of Authority

Influence shifts from brand-led messaging to consumer-led pressure for action

2022 Edelman Trust Barometer Special Report: The New Cascade of Influence

Collapse of the Purchase Funnel

Purchase is no longer the end point; it is the starting point of an ongoing consumer relationship

2023 Edelman Trust Barometer Special Report: The Collapse of the Purchase Funnel

Rise of Brand Nationalism

Rising nationalism and politically-driven buying reshape brand choice

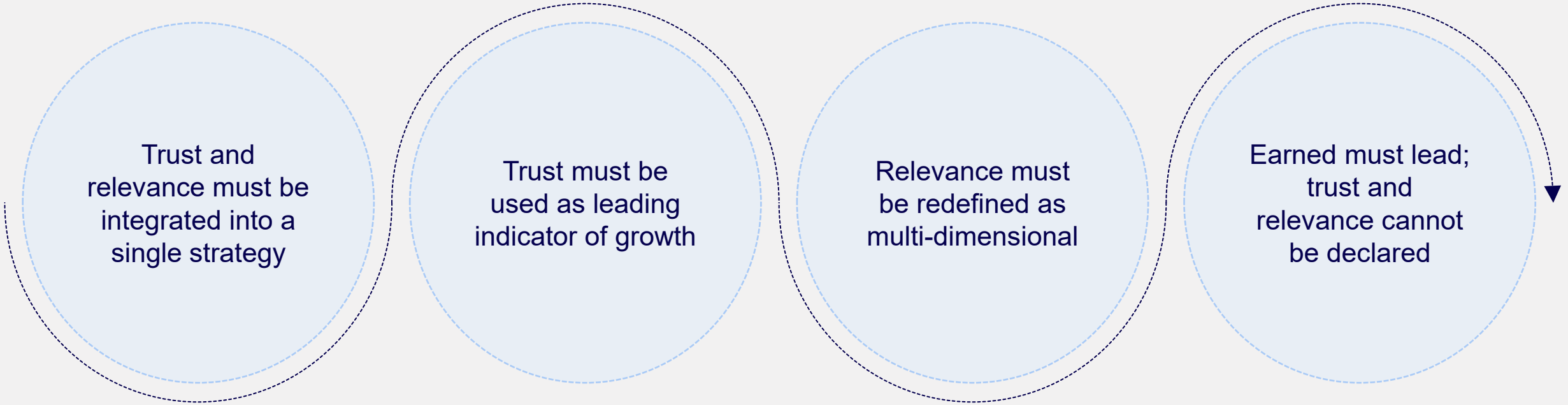
2024 Edelman Trust Barometer Special Report: Brands and Politics

Brand Purpose Becomes Personal

Brands must do good in *my* world, not just *the* world

2025 Edelman Trust Barometer Special Report: Brand Trust, From We to Me

How Does a Brand Grow When Insularity Is the Norm?



Insularity Threatens Brand Growth

Rising Stakes of Brand Choice: Brands Communicate Our Identities and Define Our Alliances

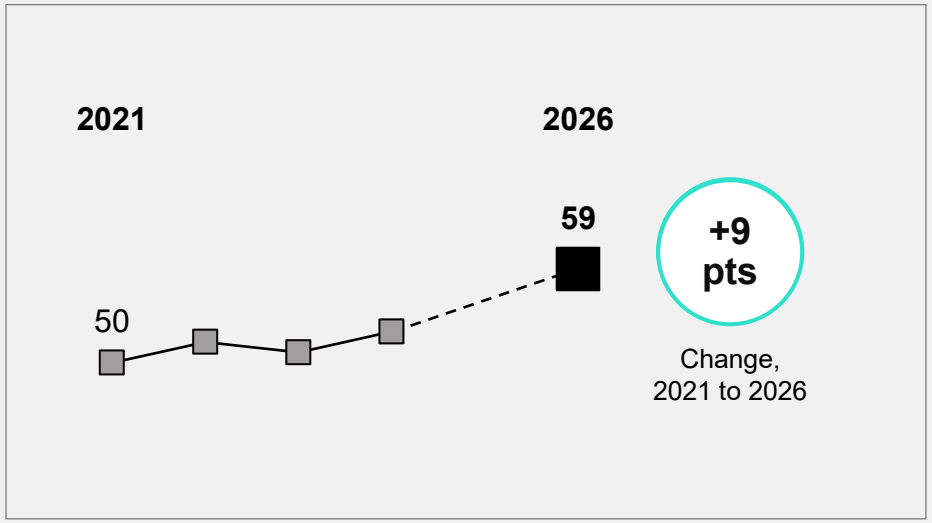
Percent who agree

GLOBAL 13 excl. China, Indonesia

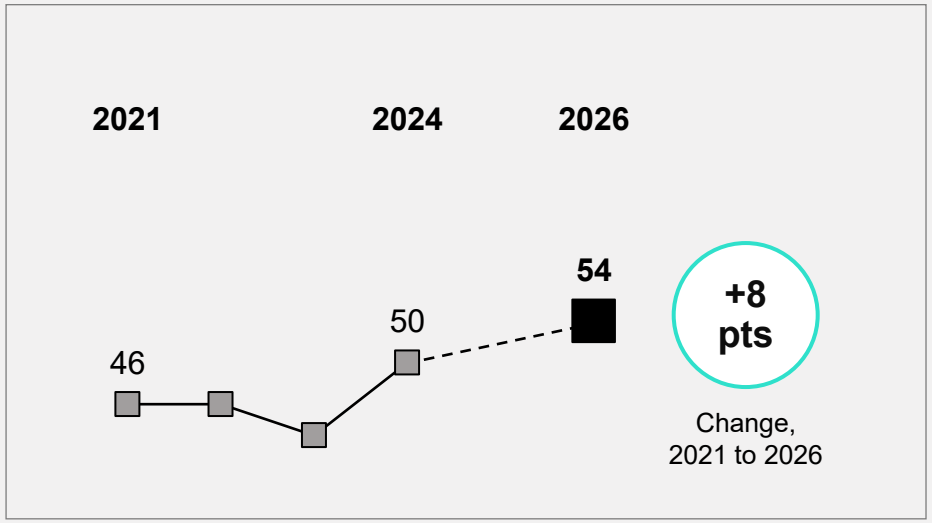
⊖ 0 ⊕

Significant change

The brands I choose to buy or not buy **say a lot about my values and priorities** in life



I feel a **connection to people who use the same brands as I do**



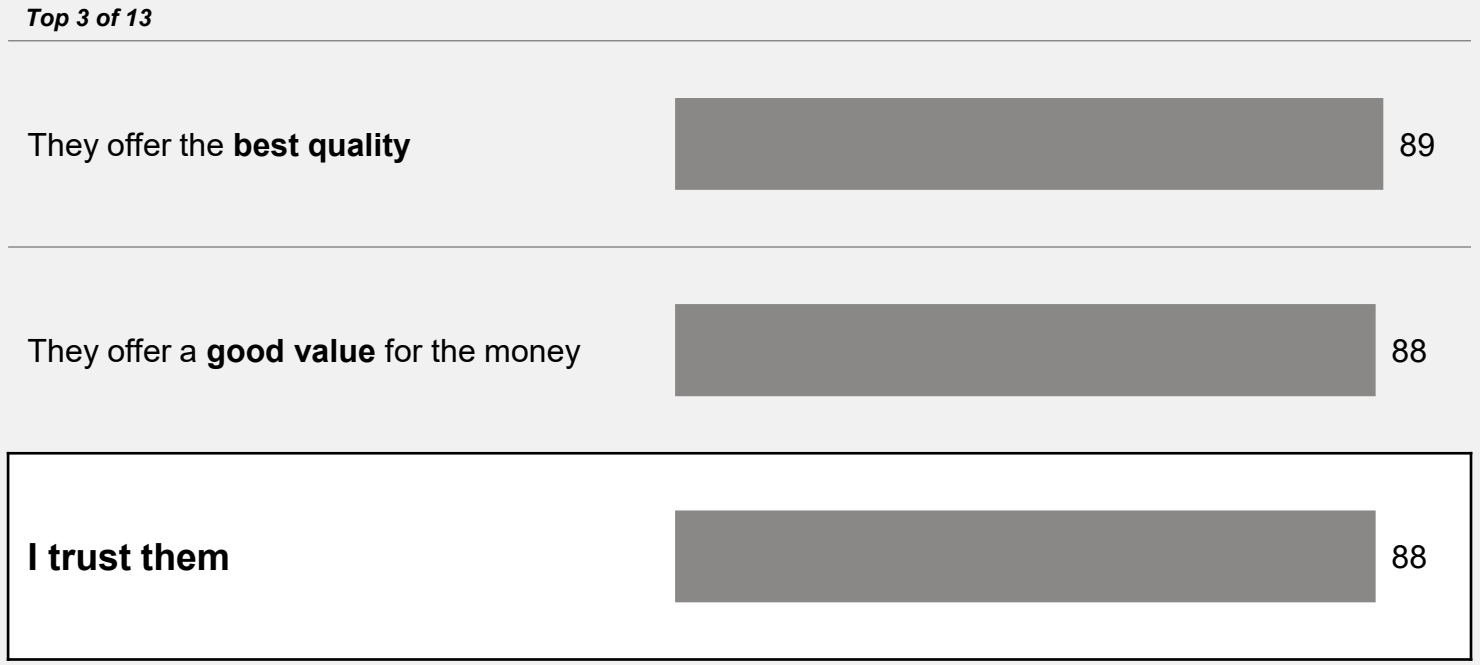
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. BRD_OP. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked to partial sample. General population, 13-mkt avg., excluding China and Indonesia. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level. Question was not asked in 2025.

Trust on Par with Quality and Value as Purchase Consideration

Percent who say

GLOBAL 15

When it comes to the brands I buy or use, it's **important, or a critical deal breaker,** that:



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior and not what you would do in a perfect world. 3-point scale; codes 1-2, important to have or a critical deal breaker. Question asked to partial sample. General population, 15-mkt avg. Data is showing the top 3 of 13 characteristics, with ties broken by decimal.

We Increasingly Use Brands We Do Not Fully Trust

Percent who say

GLOBAL 14 excl. Indonesia

Significant change

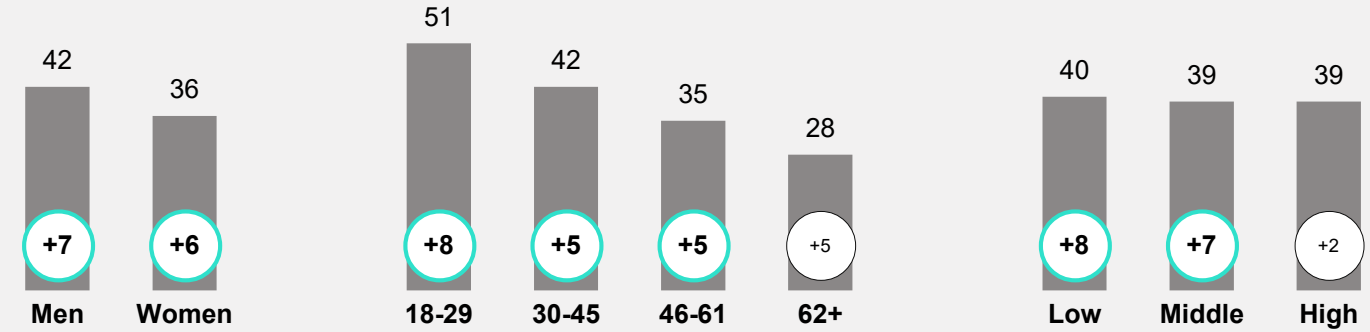
There are **brands I use, but don't fully trust**

39%

+6 pts
Change, 2022 to 2026

GENDER | AGE | INCOME

Half of Gen Z use brands they do not fully trust



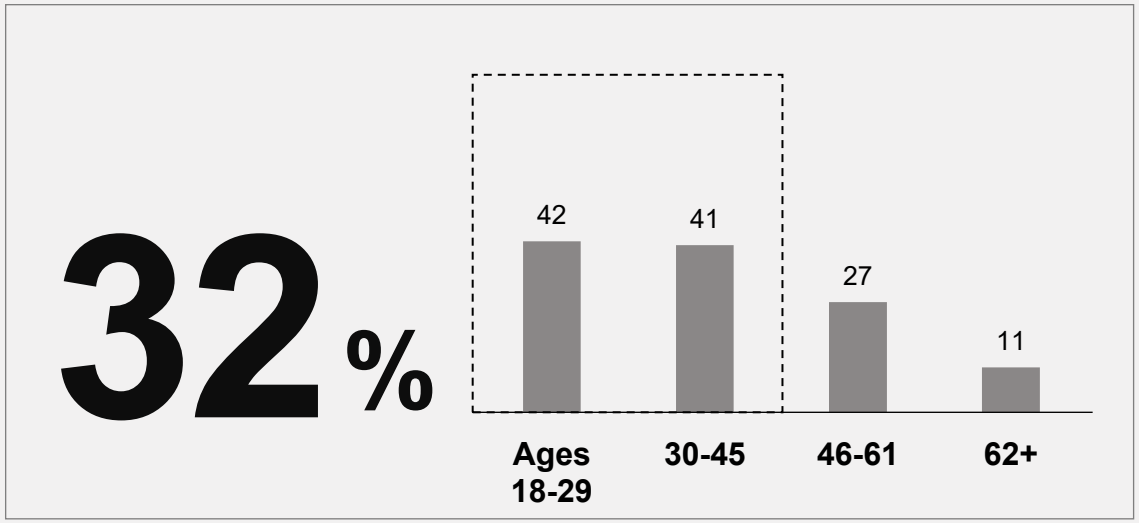
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. USE. Are there some brands that you use, but do not fully trust? Code 1, yes. Question asked to partial sample. General population, 14-mkt avg., excluding Indonesia, and by gender, age, and income. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Brand-Related Stigma and Peer Pressure Shape How, or If, We Use Brands

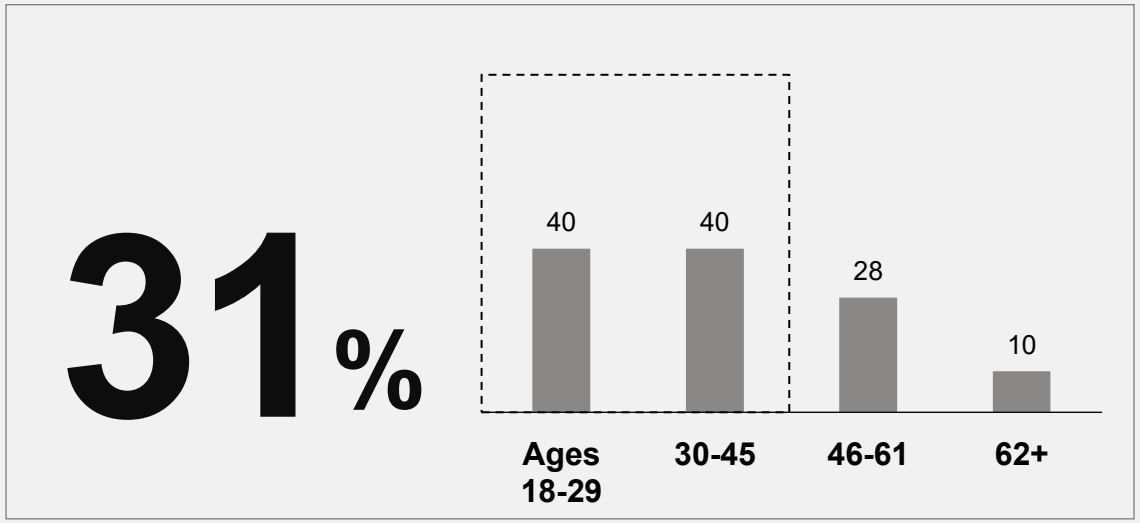
Percent who agree

GLOBAL 14 excl. China

There are **brands I use in secret to avoid the stigma** associated with them



There are **brands I've stopped using because of peer pressure**, not my personal convictions



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. BRD_OP. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked to partial sample. General population, 14-mkt avg., excluding China, and by age.

Domestic Brand Dominance: Preference for Home Country Brands Grows

Percent who say

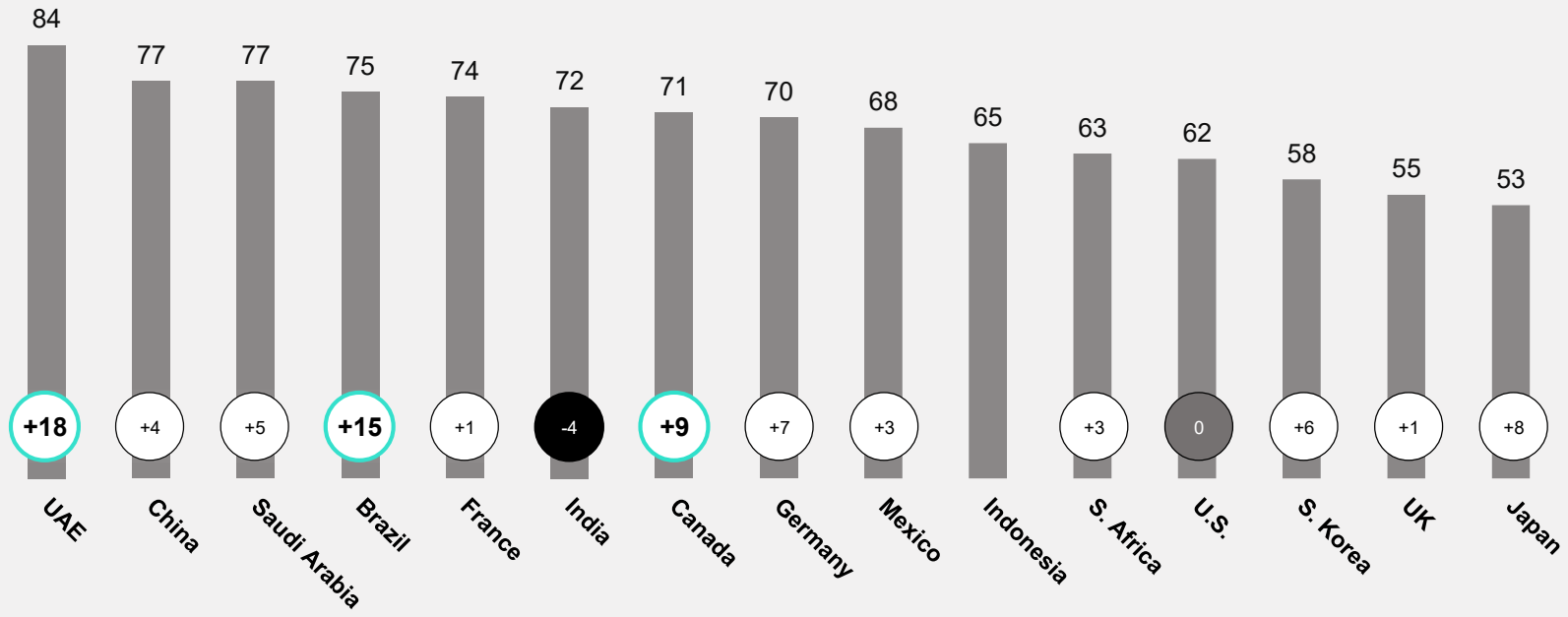
GLOBAL 14 excl. Indonesia

Significant change

When it comes to the brands I buy or use, it's **important, or a critical deal breaker,** that they are **headquartered in my country**

68%

+5 pts
Change, 2023 to 2026



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior and not what you would do in a perfect world. 3-point scale; codes 1-2, important to have or a critical deal breaker. Question asked to partial sample. General population, 14-mkt avg., excluding Indonesia. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

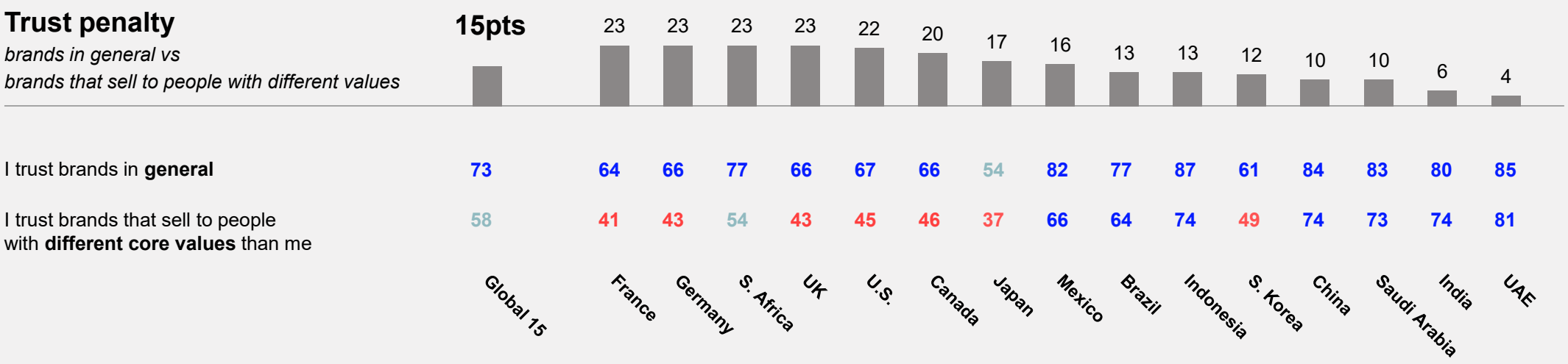
Insularity Undermines Audience Expansion: We Do Not Trust Brands That Sell to Those with Different Values Than Us

Percent who say

GLOBAL 15

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

Greater trust penalties in developed vs developing markets



Relevance Fails to Meet the Moment

Brands Must Prove They Fit Into My Life to Earn My Purchase

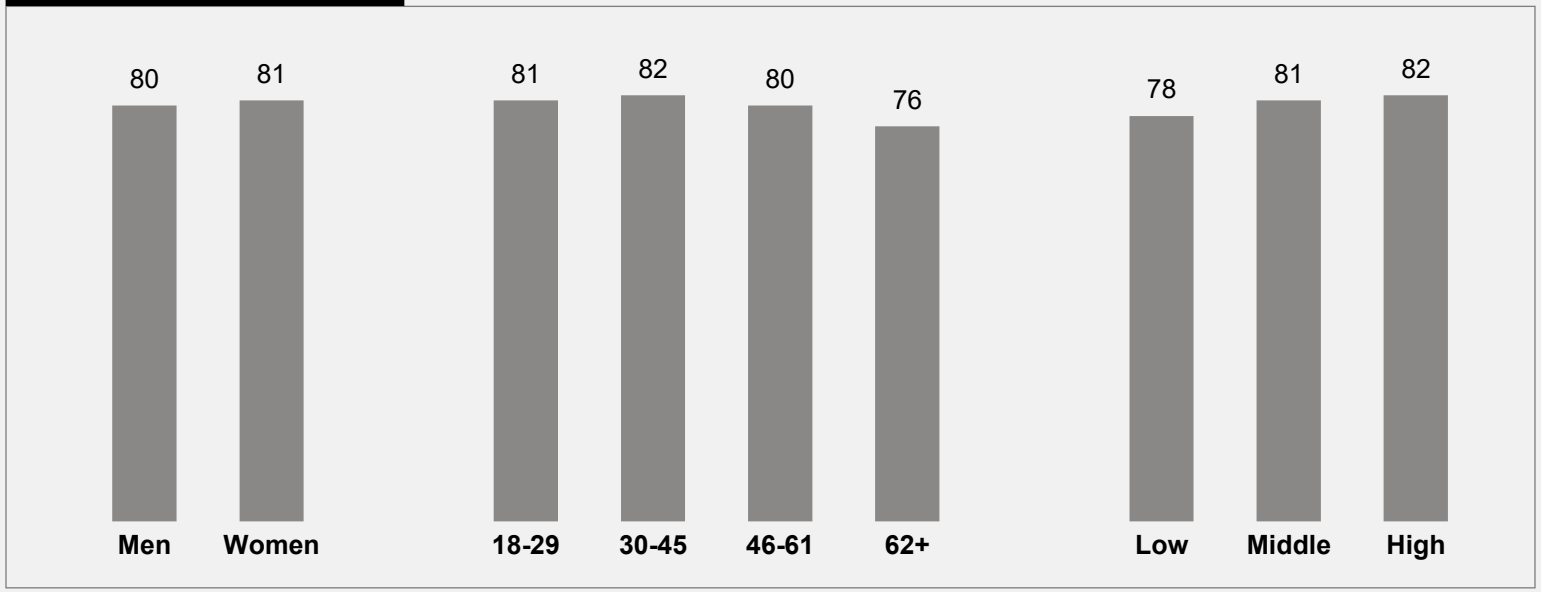
Percent who say

GLOBAL 15

When it comes to the brands I buy or use, it's **important, or a critical deal breaker,** that they are a **good fit with who I am as a person**

80%

GENDER | AGE | INCOME



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior and not what you would do in a perfect world. 3-point scale; codes 1-2, important to have or a critical deal breaker. Question asked to partial sample. General population, 15-mkt avg, and by gender, age, and income.

Relevance is Multi-Faceted: It's Not Just Pop Culture

Percent who say

GLOBAL 15

These are the things that make a **brand relevant** to me:

Utility *(avg)*	85%	• Solves a problem I have • Is innovative
Identity reflection *(avg)*	81%	• Champions my values and beliefs • Reflects my culture and background • Addresses societal problems important to me
Community connection *(avg)*	77%	• Talks about topics important to people who share my interests • Offers me ways to connect with people who share my interests
Emotional resonance *(avg)*	76%	• Creates enjoyable content • Creates advertising that make me feel strong emotions
Pop culture fluency *(avg)*	67%	• Uses pop culture in its marketing or advertising • Participates in convos about major news and events • Uses content creators I trust • Sparks discussion among creators I follow on social media

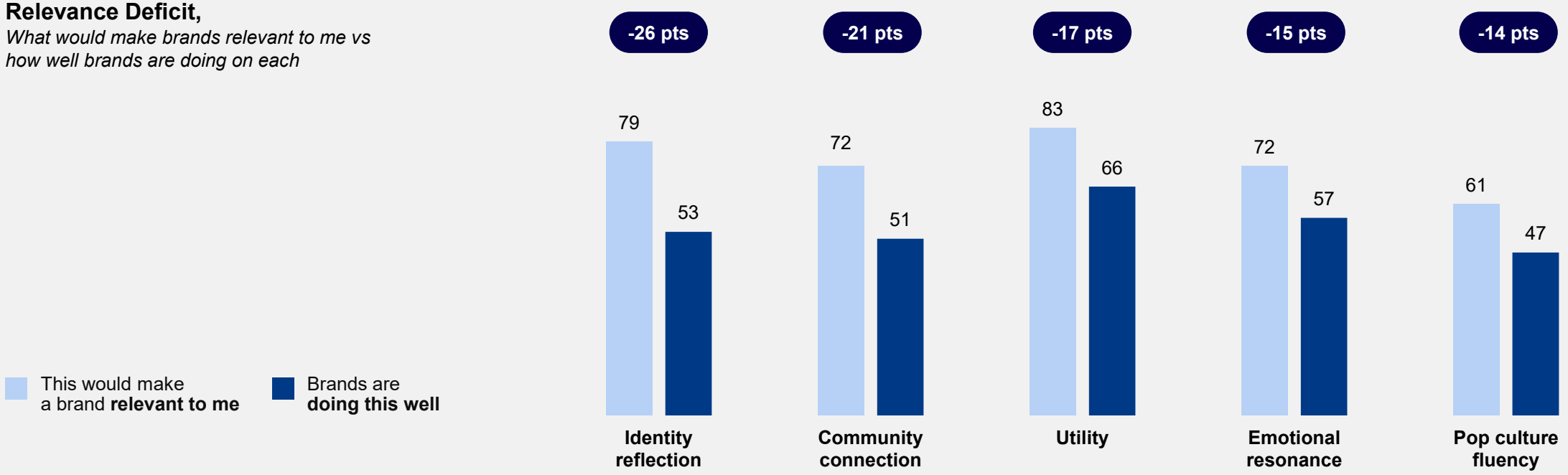
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World.
BRD_CUL_REL. Beyond just offering products and services that people need, companies try to make their brands as relevant as possible to make it more likely that people will be attracted to them. We want to know what makes a brand relevant to you. For each of the following, please indicate whether it would be effective or not at making you feel that a brand was relevant to you. 5-point scale; top 3 box, moderately or more effective. Question asked to partial sample. General population, 15-mkt avg. "Utility" is an average of items 1-2; "Identity reflection" is an average of items 3-4, 14; "Community connection" is an average of items 6-7; "Emotional resonance" is an average of items 8, 10; "Pop culture fluency" is an average of items 9, 11-13.

Relevance Deficit: Brands Fail to Establish Relevance with the Insular

Among those with an **insular trust mindset (66%)**, percent who say, on average

GLOBAL 15

Relevance Deficit,
What would make brands relevant to me vs how well brands are doing on each



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. BRD_CUL_REL. Beyond just offering products and services that people need, companies try to make their brands as relevant as possible to make it more likely that people will be attracted to them. We want to know what makes a brand relevant to you. For each of the following, please indicate whether it would be effective or not at making you feel that a brand was relevant to you. 5-point scale; top 3 box, moderately or more effective. Question asked to partial sample. REL_PERF. Generally speaking, how well would you say brands are doing when it comes to each of the following? 5-point scale; top 2 box, doing well. Question asked to partial sample. General population, 15-mkt avg. For both questions, "Utility" is an average of items 1-2; "Identity reflection" is an average of items 3-4, 14; "Community connection" is an average of items 6-7; "Emotional resonance" is an average of items 8, 10; "Pop culture fluency" is an average of items 9, 11-13.

Relevance Deficit:
Brands Fail to Establish Relevance with Gen Z, Especially on Identity Reflection

Difference, percent who say this would **make a brand relevant to me** versus percent who say brands are **doing this well**

GLOBAL 15

Relevance Deficit,
What would make a brand relevant to me vs how well brands are doing on each

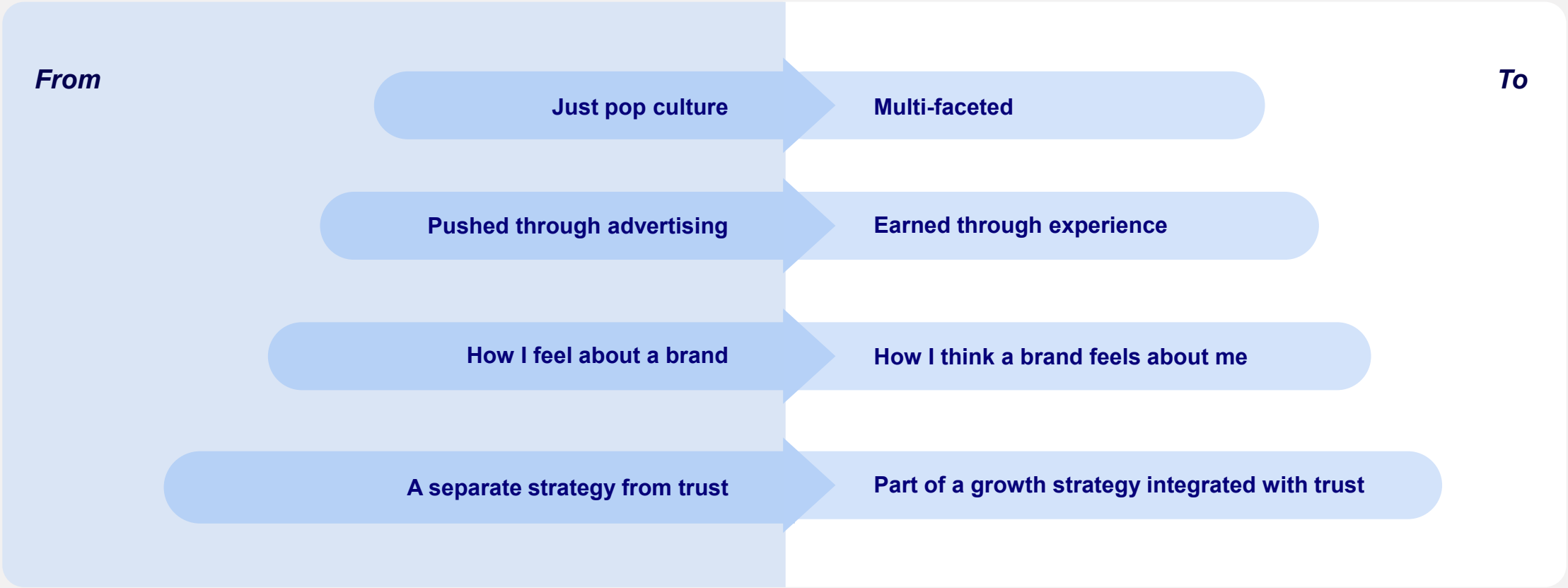
Greater than 20 points
15-20 points
Less than 15 points

	Ages 18-29	30-45	46-61	62+
Identity reflection *(avg)*	-23	-19	-24	-22
Community connection *(avg)*	-21	-18	-19	-16
Utility *(avg)*	-16	-14	-17	-15
Emotional resonance *(avg)*	-17	-15	-13	-12
Pop culture fluency *(avg)*	-16	-13	-12	-9

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. BRD_CUL_REL. Beyond just offering products and services that people need, companies try to make their brands as relevant as possible to make it more likely that people will be attracted to them. We want to know what makes a brand relevant to you. For each of the following, please indicate whether it would be effective or not at making you feel that a brand was relevant to you. 5-point scale; top 3 box, moderately or more effective. Question asked to partial sample. REL_PERF. Generally speaking, how well would you say brands are doing when it comes to each of the following? 5-point scale; top 2 box, doing well. Question asked to partial sample. General population, 15-mkt avg., by age. Data shown is the percentage point differential between performance (doing well) and effectiveness (moderately or more effective). For both questions, "Utility" is an average of items 1-2; "Identity reflection" is an average of items 3-4, 14; "Community connection" is an average of items 6-7; "Emotional resonance" is an average of items 8, 10; "Pop culture fluency" is an average of items 9, 11-13.

In an Insular World, Relevance Requires a Reframe

Relevance is …



Growth Happens With the Integration of Trust and Relevance

Brands Need Both Trust and Relevance

Percent who say

GLOBAL 15

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. Trust and Relevance segments. General population, 15-mkt avg. For a full explanation of how the trust and relevance segments were created, please see the Technical Appendix.

When Trust and Relevance Are Integrated: Greater Willingness to Give a Brand Permission to Expand Customer Base

On average, percent who say

GLOBAL 15

I would be willing to continue to use a brand that **decides to start selling to people who:**

- *Live by **different core values** than me*
- *Believe **different facts** and trusts **different sources** than I do*
- *Want to address **societal problems differently** than I do*
- *Have a **different culture, background, or lifestyle** than mine*

Those who trust brands and feel they are relevant
***35 pts** more likely to stick with the brand than those who say neither*

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. INS_USE_1-4. We want to know whether you would use brands that are mainly used by or associated with people who [live by different core values; have different solutions to societal problems; have different facts they rely on; have different culture, life experiences, or backgrounds] than you. Please read through the following scenarios and indicate for each whether you would or would not be willing to use, or continue using, the brand being described. 5-point scale; top 2 box, somewhat or very willing. Data shown is the average across the four dimensions of difference. Questions asked to partial sample. General population, 15-mkt avg., by Trust and Relevance segments. For a full explanation of how the trust and relevance segments were created, please see the Technical Appendix.

When Trust and Relevance Are Integrated: Greater Willingness to Use Brands in Public Despite Different Customer Base

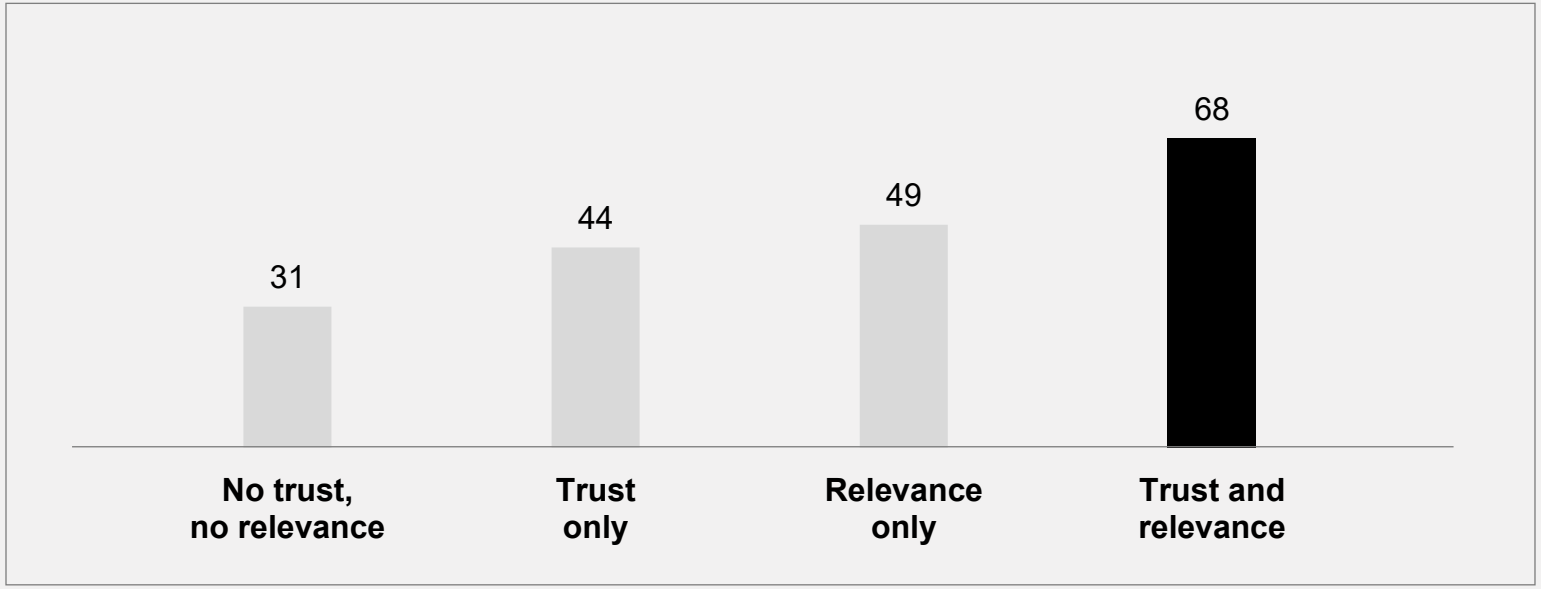
On average, percent who say

GLOBAL 15

I would be willing to use a brand that other people would **see me using in public** that is primarily associated with **people who:**

- *Live by **different core values** than me*
- *Believe **different facts** and trusts **different sources** than I do*
- *Want to address **societal problems differently** than I do*
- *Have a **different culture, background, or lifestyle** than mine*

Those who trust brands and feel they are relevant
***37 pts** more likely to use the brand in public than those who say neither*



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. INS_USE_1-4. We want to know whether you would use brands that are mainly used by or associated with people who [live by different core values; have different solutions to societal problems; have different facts they rely on; have different culture, life experiences, or backgrounds] than you. Please read through the following scenarios and indicate for each whether you would or would not be willing to use, or continue using, the brand being described. 5-point scale; top 2 box, somewhat or very willing. Data shown is the average across the four dimensions of difference. Questions asked to partial sample. General population, 15-mkt avg., by Trust and Relevance segments. For a full explanation of how the trust and relevance segments were created, please see the Technical Appendix.

When Trust and Relevance Are Integrated: More Engagement on Brand's Social Channels

Percent who say

GLOBAL 15

I **engage with others on a brand's social media channels** monthly or more

Those who trust brands <u>and</u> feel they are relevant
***32 pts** more likely to engage on a brand's social media than those who say neither*

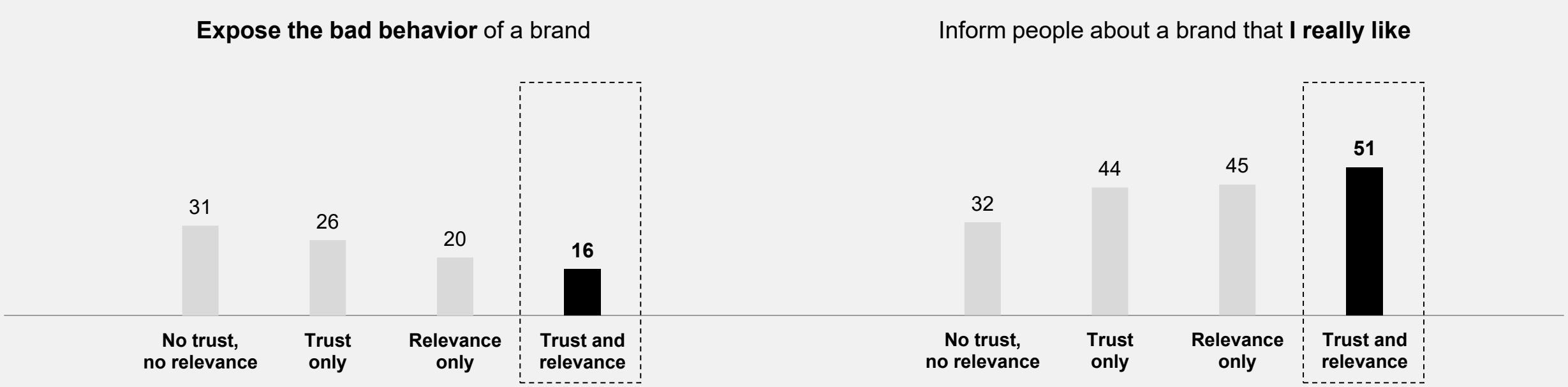
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. MED_SEG_OFT. How often do you engage in the following activities? 7-point scale; codes 3-7, monthly or more. Question asked to partial sample. General population, 15-mkt avg., by Trust and Relevance segments. For a full explanation of how the trust and relevance segments were created, please see the Technical Appendix.

When Trust and Relevance Are Integrated: Less Brand Backlash, Greater Brand Advocacy

Among those who have shared or forwarded brand-related content (74%), percent who say

GLOBAL 15

I **shared brand-related content** to:



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. WHY_SHARE. Why did you share or forward the brand-related piece of content? Pick all that apply. Question asked to partial sample; asked to those who share or forward brand-related content monthly or more (BRD_SHARE/1). General population, 15-mkt avg., by Trust and Relevance segments. For a full explanation of how the trust and relevance segments were created, please see the Technical Appendix.

The Trust-Relevance Disconnect: Nearly 1 in 2 Say Brands Are Failing to Earn Trust, Be Relevant, or Both

Percent who say

GLOBAL 15

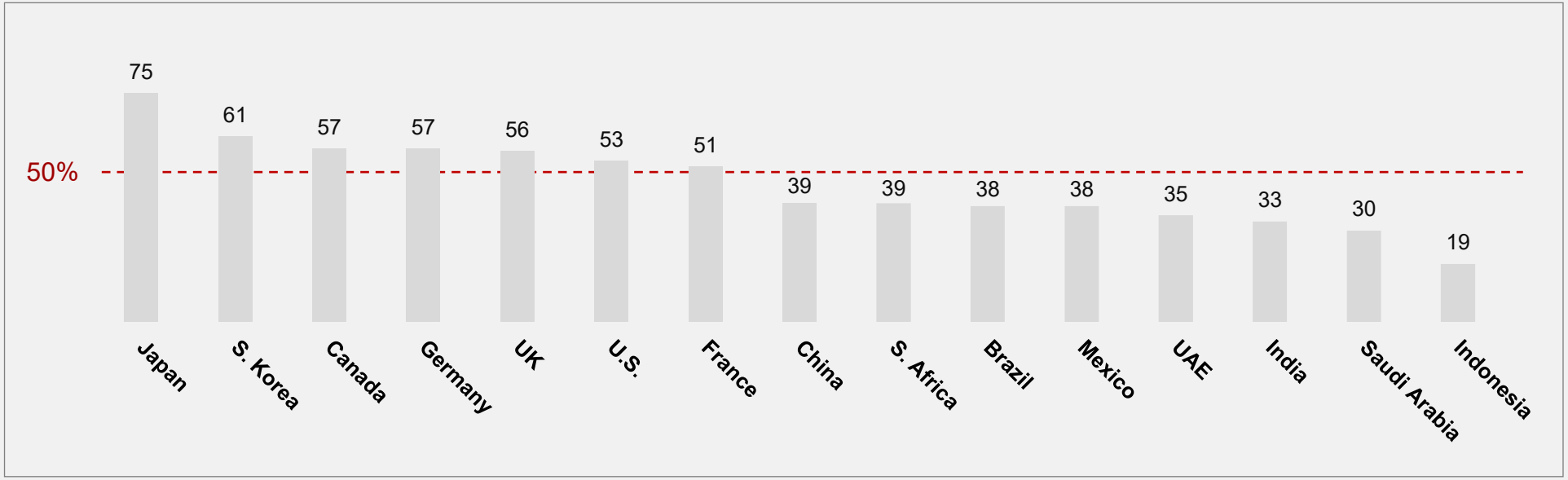
Trust only, relevance only, or neither

45%

I do not trust brands in general

and / or

I think brands are not doing well at being relevant (avg)



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. Trust and Relevance segments. General population, 15-mkt avg. For a full explanation of how the trust and relevance segments were created, please see the Technical Appendix. Data shown is a net of those who only trust brands, only think brands are doing well at being relevant, or don't trust brands or think they're doing well at being relevant.

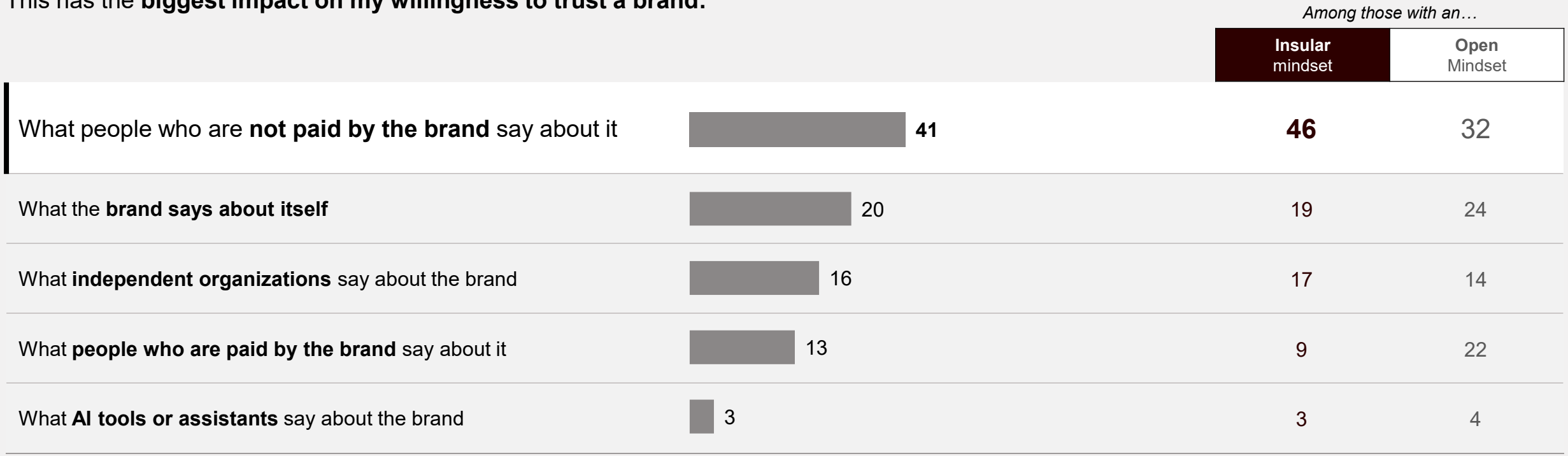
Trust and Relevance Are Built Through an Earned Strategy

Earned is the Most Powerful Way to Build Trust

Percent who say

GLOBAL 15

This has the **biggest impact on my willingness to trust a brand:**



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. TRU_SOURCE. Of the following ways you could learn about a brand, which one has the biggest impact on your willingness to trust the brand? Question asked to partial sample. General population, 15-mkt avg., and by insularity segments. For a full explanation of how the insularity segments were created, please see the Technical Appendix.

Emphasize Product Qualities and Functionality to Appeal Across Divides

Among those who say they would be **unwilling** to keep using a brand that starts selling to people different from them (17%), rank order based on percent who say

GLOBAL 15

A brand could do the following to make me feel more comfortable using it even if it decides to start selling to people who:

- *Live by **different core values** than me*
- *Believe **different facts** and trusts **different sources** than I do*
- *Want to address **societal problems differently** than I do*

***Top 5 of 11** (avg)*

#1	**Be transparent** about why they are trying to reach both of us as customers
#2	Make a **product so outstanding that there is no question** as to why someone would buy it
#3	**Focus its marketing on the qualities of the product** and not what its customers are like
#4	Help its customers feel like they are **both members of the same community**
#5	Provide **opportunities for feedback** and show they **listen to people like me**

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. INS_GROW_1-3. What, if anything, could a brand do to make you feel comfortable using it even though… It decides to start selling its products to people who [live by different core values; have different solutions to societal problems; have different facts they rely on] than you. Pick all that apply. Question asked to partial sample; asked to those who said they would be unwilling to use a brand in that scenario (INS_USE_1-3 = c1-2 at r3). Data averaged across the three dimensions of difference (INS_GROW_1-3); items shown are the top 5 of 11, with ties broken by decimal. General population, 15-mkt avg.

Experience Establishes Relevance for the Insular; Paid is More Powerful for the Open

Percent who say

GLOBAL 15

This is **where I determine** whether a **product will satisfy my needs:**

	Among those with an…	
	Insular mindset	**Open** Mindset
My **own direct, personal experiences** with the brand	**29**	23
People I know in real life	**22**	15
The **brand's advertising**	19	**27**
Social media posts from **paid creators**	13	**24**

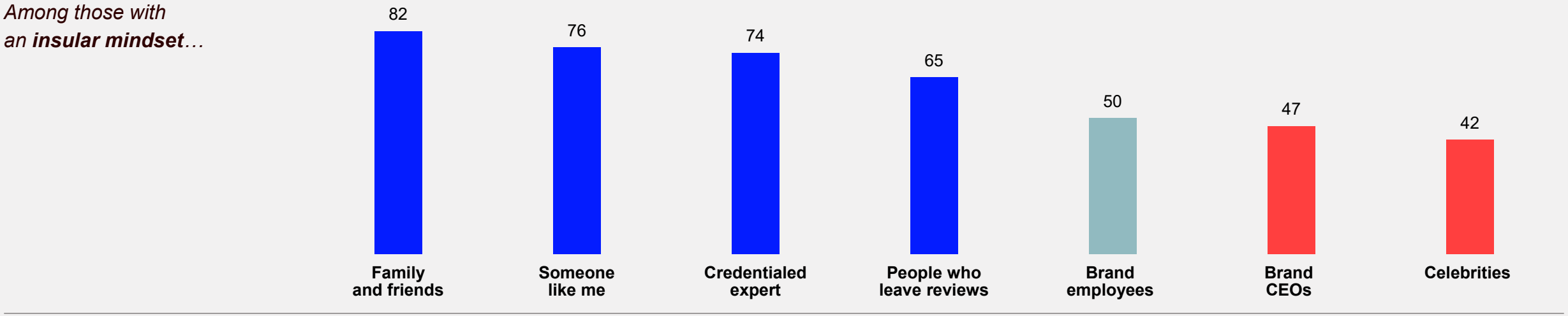
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. BRD_COMS. Among the following places you might find information about a brand, please select all that fit each description below. Pick all that apply. Question asked to partial sample. General population, 15-mkt avg., by insularity segments. For a full explanation of how the insularity segments were created, please see the Technical Appendix.

Relevance Conversation Has to Start Within Insular Trust Circles

Percent trust to give accurate information about a brand

GLOBAL 15

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



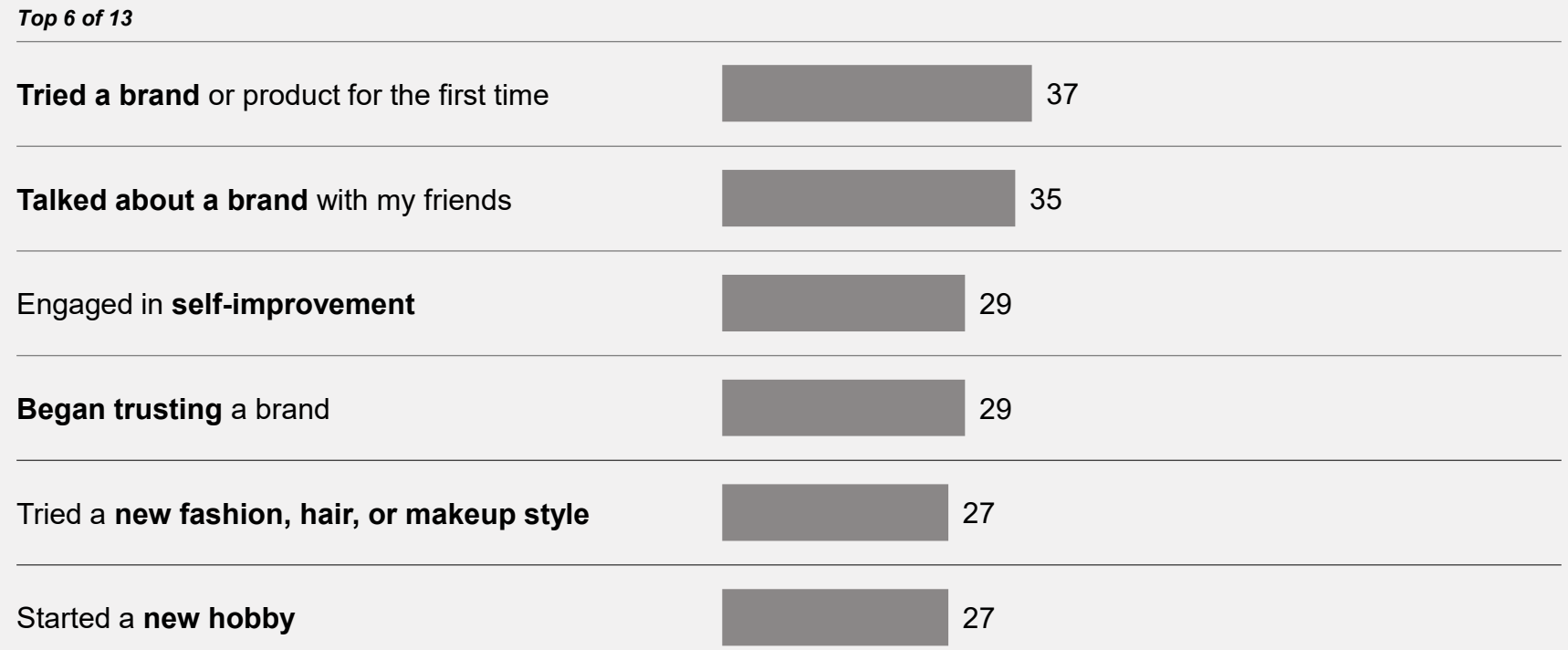
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. TRU_SPK. How much do you trust each of the following to give you accurate information about a brand? 9-point scale; top 4 box, trust. Question asked to partial sample. General population, 15-mkt avg., by insularity segments. For a full explanation of how the insularity segments were created, please see the Technical Appendix.

Creators Can Drive People to Action

Among those who follow content creators (62%), percent who say

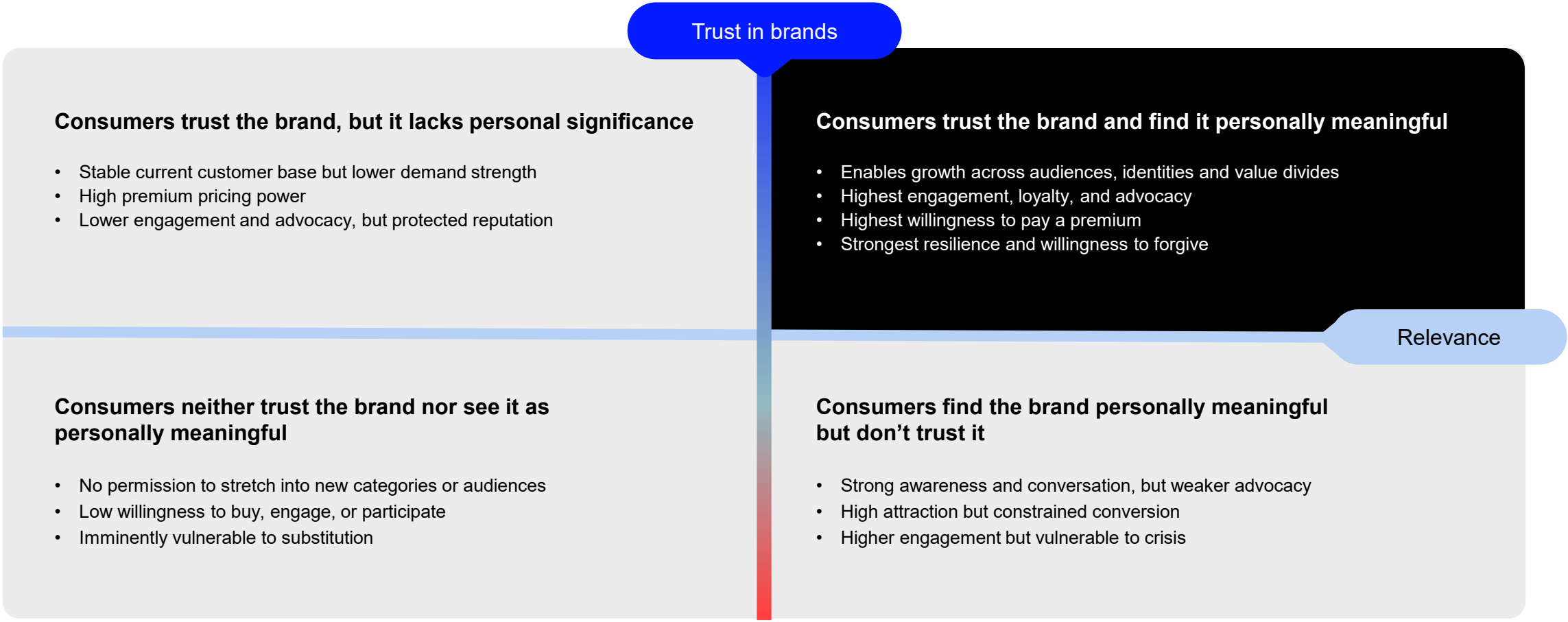
GLOBAL 15

In the past six months,
I have done the following **because of the content creators I follow:**



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. INFLU_ACT. Which of the following have you done in the last six months because of the content creators you follow? Pick all that apply. Question asked to those who follow a content creator (FOL_CON_CRE/1). General population, 15-mkt avg. Data is showing the top 6 of 13 actions, with ties broken by decimal.

Growth Happens When Trust and Relevance Are Integrated



Conceptual framework derived from research, illustrating the relationship between Trust and Relevance

Brand Playbook for Growth in an Insular World

1

Integrate trust and relevance into a growth strategy

Relevance creates fit, but being relevant at scale means you inherently risk alienating some. Pair every relevance move with trust proof, so the brand has permission to stretch without losing confidence.

2

Use trust as a leading growth indicator

Do not wait for trust to show up as a reputation issue. Track where trust is creating or constraining premium, loyalty, adoption, advocacy, forgiveness, and permission to stretch across audiences.

3

Choose the right relevance levers

Relevance isn't only culture or fame. Diagnose the growth problem, then activate the right dimension of fit: utility, identity, community, emotion, or pop culture fluency.

4

Lead with earned, scale with paid

Start with ideas credible enough for others to validate, translate, share, review, and carry forward. Make those proof points discoverable in LLM-driven search. Use owned and paid to substantiate and amplify what earned makes believable.

Appendix: Supplemental Data

Brands Have a Trust Advantage Over Institutions

Percent who say

GLOBAL 14 excl. Indonesia

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

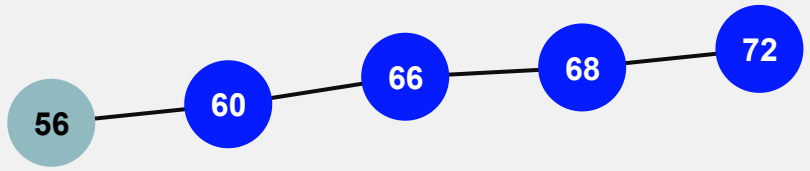
Trust in Institutions

I trust **institutions**
(Trust Index, avg of business, government, media, NGOs)

Jan 2022 — Jan 2026

Trust in Brands

I trust **brands in general**



June 2022 — June 2026

2026 Edelman Trust Barometer. The Trust Index is the average percent trust in business, government, media, and NGOs. 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, 14-mkt avg., excluding Indonesia. Due to a translation inconsistency in France, the 2021-2023 Trust Index scores have been imputed using a model. For more details, please see the Technical Appendix.
2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. TRU_BRD. For each of the following, please indicate how much you trust them to do what is right. 9-point scale; top 4 box, trust. General population, 14-mkt avg., excluding Indonesia.

The New Market Reality: 2 in 3 Have an Insular Trust Mindset

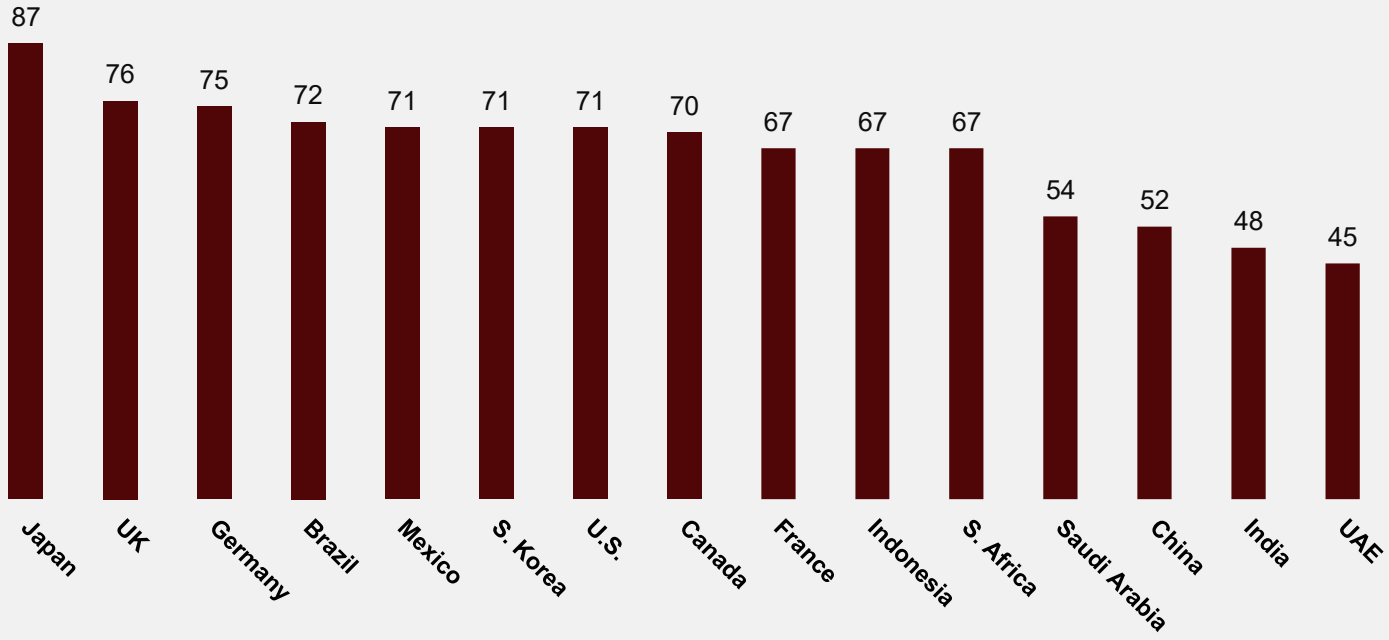
On average, percent who say

GLOBAL 15

I am generally **hesitant or unwilling** when it comes to **trusting someone who:**

- *Lives by **different core values** than me*
- *Believes **different facts** and trusts **different sources** than I do*
- *Wants to address **societal problems differently** than I do*
- *Has a **different culture, background, or lifestyle** than mine*

66%



2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. Insularity segments. General population, 15-mkt avg. For a full explanation of how the insularity segments were created, please see the Technical Appendix.

Relevance is Multi-Faceted: It's Not Just Pop Culture

Percent who say

GLOBAL 15

These are the things that make a **brand relevant** to me:

	Global 15	Brazil	Canada	China	France	Germany	India	Indonesia	Japan	Mexico	Saudi	S. Africa	S. Korea	UAE	UK	U.S.
Utility *(avg)*	**85**	91	83	85	84	83	88	94	72	87	93	87	83	90	76	82
Identity reflection *(avg)*	**81**	88	74	84	81	80	85	88	73	81	89	83	79	88	68	71
Community connection *(avg)*	**77**	85	64	82	72	73	83	86	66	78	87	80	79	86	61	67
Emotional resonance *(avg)*	**76**	84	64	84	67	69	85	88	64	79	85	82	75	88	60	67
Pop culture fluency *(avg)*	**67**	75	54	82	59	59	78	76	52	68	82	71	68	82	49	56

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. BRD_CUL_REL. Beyond just offering products and services that people need, companies try to make their brands as relevant as possible to make it more likely that people will be attracted to them. We want to know what makes a brand relevant to you. For each of the following, please indicate whether it would be effective or not at making you feel that a brand was relevant to you. 5-point scale; top 3 box, moderately or more effective. Question asked to partial sample. General population, 15-mkt avg. "Utility" is an average of items 1-2; "Identity reflection" is an average of items 3-4, 14; "Community connection" is an average of items 6-7; "Emotional resonance" is an average of items 8, 10; "Pop culture fluency" is an average of items 9, 11-13.

Emphasize Product Qualities and Functionality to Appeal Across Divides

Among those who say they would be **unwilling** to keep using a brand that starts selling to people different from them (17%), rank order based on percent who say

GLOBAL 15

A brand could do the following to make me feel more comfortable using it even if it decides to start selling to people who:

- *Live by **different core values** than me*
- *Believe **different facts** and trusts **different sources** than I do*
- *Want to address **societal problems differently** than I do*

Be transparent about why they are trying to reach both of us as customers	22
Making a product that is so outstanding that there's no question as to why someone would buy it	22
Focus its marketing on the qualities of the product and not what its customers are like	19
Help its customers feel like they are both members in the same community	18
Provide opportunities for feedback and show they listen to people like me	17
Highlight what I have in common with these customers	16
Ensure that people like me are represented in their advertising and marketing	16
Show authentic stories or testimonials from people like me who use the brand	16
Host events so that I can get to know these customers better	12
Use influencers and content creators I trust to talk about the brand	11
Nothing a brand does would make me feel comfortable using it in this situation	11

2026 Edelman Trust Barometer Special Report: Brand Growth in an Insular World. INS_GROW_1-3. What, if anything, could a brand do to make you feel comfortable using it even though… It decides to start selling its products to people who [live by different core values; have different solutions to societal problems; have different facts they rely on] than you. Pick all that apply. Question asked to partial sample; asked to those who said they would be unwilling to use a brand in that scenario (INS_USE_1-3 = c1-2 at r3). Data averaged across the three dimensions of difference (INS_GROW_1-3). Data shown in rank order, with ties broken by decimal. General population, 15-mkt avg.

Technical Appendix

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World*

Country Sample Sizes, Margins of Error, and Quotas

Country	Weighted Sample Size[1]	Unweighted Sample Size	Margin of Error[2]	Quotas Set On[3]
Global 15[4]	18,000	17,688	+/- 1.0 percentage points total sample	Quotas set at the country level
Brazil	1,200	1,192	+/- 3.7 pct pts. total sample	Age, Gender, Region
Canada	1,200	1,200		
China[5]	1,200	1,170	+/- 3.8 pct pts. total sample	
France	1,200	1,198	+/- 3.7 pct pts. total sample	
Germany	1,200	1,196		
India	1,200	1,128	+/- 3.8 pct pts. total sample	
Indonesia	1,200	1,121		
Japan	1,200	1,197	+/- 3.7 pct pts. total sample	
Mexico	1,200	1,139	+/- 3.8 pct pts. total sample	
Saudi Arabia	1,200	1,173		
S. Africa	1,200	1,197	+/- 3.7 pct pts. total sample	
S. Korea	1,200	1,198		
UAE	1,200	1,199		
UK	1,200	1,198		
U.S.	1,200	1,182		

1. Data reported on slides is weighted to the same total base size to ensure each country has an equal effect on the global average. Some questions were asked to partial sample. Please refer to the footnotes on each slide for details.
2. Margin of error is calculated on the unweighted sample sizes, utilizing a 99% confidence interval.
3. There were additional quotas on ethnicity in the UK and U.S., and on nationality in Saudi Arabia and the UAE.
4. The “global average” indicates the average result of all the countries where data was collected. As mentioned above, there has been no adjustment made to the population size relative to each country and the global average is not intended to suggest a total result of the entire global population.
5. All data collected in China is from the mainland. Regions of Greater China were not surveyed.

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World*

Partial Sample Size and Margin of Error

To improve respondent experience and minimize the length of interview, several questions included in this report were only asked to a subset of the sample[1]. Please refer to the below specifications to better understand which questions were not asked to the full sample and thus will have a larger margin of error than questions asked to all respondents.

Variable	Total Answering at Reported Global Avg (unweighted)	Country Base (unweighted)		Total Margin of Error[2] (+/- percentage points)	Country Margin of Error[2] (+/- percentage points)	
		min	max		range	
PERS_EMO	6,619	420	450	1.6	6.1	6.3
BRD_OP	5,763 (Global 13) 6,184 (Global 14)	419	451	1.6	6.1	6.3
TRUST_IMP	4,446 (Global 15) 4,166 (Global 14)	280 (Global 15) 282 (Global 14)	300	1.9	7.4	7.7
USE	4,166	282	300	1.9	7.4	7.7
BRD_CUL_REL	13,242	839	900	1.1	4.3	4.5
REL_PERF	6,623	419	451	1.5	6.1	6.3
MED_SEG_OFT	13,242	839	900	1.1	4.3	4.5
WHY_SHARE	5,289	141	544	1.7	5.5	10.9
TRU_SOURCE	13,242	839	900	1.1	4.3	4.5
BRD_COMS	6,623	419	451	1.5	6.1	6.3
TRU_SPK	6,623	419	451	1.5	6.1	6.3

1. Some items within a question were shown only to respondents who are employees of organizations. Employee-specific base size and margin of error is not reflected here.
2. Margin of error is calculated on the unweighted sample sizes, utilizing a 99% confidence interval.

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World*

Countries Included in the Various Global Averages

	Global 15	Tracking average Global 14	Exclusion average Global 14[1]	Tracking average & exclusion Global 13
All countries surveyed:	Used for **current year averages** and **tracking to 2024**	Used for **tracking to 2021, 2022, and 2023**	Used for **current year** averages; excludes **China**	Used for **tracking to 2021, 2022, and 2023**; excludes **China**
Brazil	Brazil	Brazil	Brazil	Brazil
Canada	Canada	Canada	Canada	Canada
China	China	China	----	----
France	France	France	France	France
Germany	Germany	Germany	Germany	Germany
India	India	India	India	India
Indonesia[2]	Indonesia	----	Indonesia	----
Japan	Japan	Japan	Japan	Japan
Mexico	Mexico	Mexico	Mexico	Mexico
Saudi Arabia	Saudi Arabia	Saudi Arabia	Saudi Arabia	Saudi Arabia
S. Africa	S. Africa	S. Africa	S. Africa	S. Africa
S. Korea	S. Korea	S. Korea	S. Korea	S. Korea
UAE	UAE	UAE	UAE	UAE
UK	UK	UK	UK	UK
U.S.	U.S.	U.S.	U.S.	U.S.

1. During our standard data quality review, we identified three survey questions for which responses from China showed unusually large changes year-over-year that could not be readily explained by external events or other findings in the dataset. As a precaution, China has been excluded from the results for these three questions only. No similar issues were identified elsewhere in the data.
2. Indonesia was first introduced to the survey in 2024. Any data trends to years prior to 2024 will exclude Indonesia from the analysis.

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World*

Survey Languages Used and Internet Penetration by Country

	Languages	Internet Penetration*
Brazil	Portuguese	84%
Canada	Localized English, Canadian French	94%
China	Simplified Chinese	92%
France	French	89%
Germany	German	93%
India	Localized English	70%
Indonesia	Indonesian	73%

	Languages	Internet Penetration*
Japan	Japanese	86%
Mexico	Localized Spanish	83%
Saudi Arabia	Localized English, Arabic	100%
S. Africa	Localized English, Afrikaans	78%
S. Korea	Korean	98%
UAE	Localized English, Arabic	100%
UK	Localized English	95%
U.S.	English, Localized Spanish	95%

*Data source: Individuals using the Internet (% of population) | Data (worldbank.org). Date accessed: June 16, 2026. In countries with lower internet penetration, the online sample in those countries tends to skew younger, urban, and more affluent.

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World:* Data Analysis in Detail

How We Measured Insularity

The insularity segmentation was created by assigning respondents into one of three groups based on how they rated their own willingness to trust someone who is different from themselves.

Respondents were shown four ways someone could differ from them: their values they live by, approaches to solving societal problems, trusted facts and sources, and culture or background. For each dimension of difference, they were asked to assess their willingness to trust someone like this using the scale points to the right.

A respondent's individual ratings at each dimension of difference were averaged together* to create one number indicating their overall average willingness to trust someone who is different from them.

That score was then used to classify respondents into one of three groups:

- **Unwilling to trust (29%):** average score between 1 and 2.5
- **Hesitant to trust (37%):** average score between 2.51 and 3.49
- **Open to trust (34%):** average score between 3.5 and 5

Question text	**TRU_CIR_PEP.** We want to know what kinds of people you do and do not trust. Please indicate whether you could, or currently do, trust someone who was different from you in the following ways. (Please select one response for each.)
Scale points	1. Definitely not, I could never trust someone like this 2. Probably not 3. Probably yes 4. Definitely yes, I could trust someone like this 5. Yes, and I currently do trust someone like this 99. Don't know / Not sure
Dimensions of difference	1. Many of the core values they live by are different from yours. Their moral code, sense of right and wrong, or beliefs about justice do not match yours. 2. They want to solve societal problems differently than you do. They would use different approaches or different types of solutions than you would to address societal challenges. 3. Many of the facts they rely on are different from yours. They believe different things are true and trust different sources of information. 4. Their culture, life experiences, or backgrounds are different from yours. They have a different level of education or wealth, live in a different part of the world, or have a different lifestyle.

*If a respondent said "Don't know / Not sure" to any of the four dimensions of difference, that dimension was left out of the average score calculated for that respondent.

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World:* Data Analysis in Detail

How We Measured Trust and Relevance

The trust and relevance segmentation was created by assigning respondents into one of four groups based on how they rated their trust in brands in general and overall performance of brand relevance.

Respondents were first asked to rate their overall trust in brands in general using a 9-point scale.

- Trust (73%): Score between 6 and 9
- Do not trust (27%): Score between 1 and 5; or 99 (don't know)

Next, respondents were shown 13 ways in which a brand could be relevant. For each relevance behavior, they were asked to assess how well brands are performing using the 5 scale points in the table to the right.

A respondent's individual ratings for each relevance behavior were averaged together* to create one number indicating their overall average performance rating of brands achieving relevance. If that number was between 3.5 and 5, respondents were categorized as thinking brands are relevant. These scores were then used to classify respondents into one of four groups:

- No trust, no relevance (14%): Trust score between 1 and 5; or 99; average relevance score between 1 and 3.49
- Trust only (20%): Trust score between 6 and 9; average relevance score between 1 and 3.49
- Relevance only (11%): Trust score between 1 and 5; or 99; average relevance score between 3.5 and 5
- Trust and relevance (55%): Trust score between 6 and 9; average relevance score between 3.5 and 5

Items	Question text
Trust In brands	**TRU_BRD:** For each of the following, please indicate how much you **trust** them to do what is right. Please indicate your answer using a 9-point scale where one means that you "**do not trust them at all**" and nine means that you "**trust them a great deal**".
	Brands in general
Relevance performance scale	**REL_PERF:** Generally speaking, how well would you say brands are doing when it comes to each of the following? *(Please select one response for each.)* 1. They are failing at this 2. They are doing poorly on this 3. They are doing mediocre on this 4. They are doing this well 5. They are doing this very well 99. Don't know / Not sure
Relevance behaviors	Solving a problem or satisfying a need that I have
	Being innovative or cutting edge
	Addressing social or societal problems that are important to me
	Championing values and beliefs that matter to me
	Offering me ways of connecting with other people who share my interest and passions
	Talking about topics that are important to people who share my hobbies and interests
	Creating online content that is enjoyable, entertaining, or fun to engage with
	Sparking debate or discussion among the influencers or content creators I follow on social media
	Creating marketing or advertising that causes me to feel strong emotions
	Using or incorporating popular culture in its marketing or advertising
	Using or incorporating the content creators and influencers I trust in their marketing or advertising
	Referencing or participating in conversations about major news and cultural events
	Reflecting the cultural traditions and values that I grew up with

*If a respondent chose "Don't know / Not sure" at any of the 13 relevance behaviors, that behavior was left out of the average score calculation for that respondent.

An average score between 3.5 and 5 means a respondent on average answered either 4 or 5 for each of the items shown at REL_PERF.

2026 Edelman Trust Barometer Special Report: *Brand Growth in an Insular World:* Data Analysis in Detail

How We Measured Unwillingness to Buy Brands Across Dimensions of Difference

Respondents were asked how willing they would be to use a brand across three brand-use scenarios associated with people who differ from them. The study examined four dimensions of difference, resulting in twelve distinct scenario-by-dimension combinations overall. Each respondent evaluated a subset of these combinations.

The net percentage of respondents who selected very or somewhat unwilling at any of the three scenarios involving that dimension of difference was calculated separately for each dimension of difference.

The resulting four percentages were averaged together to get an overall average percent who are unwilling to use a brand when associated with people who are different.

This analysis was conducted separately for open and insular segments.

Dimension of difference	Net, unwilling in one or more of the three scenarios	
	Open	Insular
INS_USE_1: core values	15	35
INS_USE_2: solutions to societal problems	14	30
INS_USE_3: facts	13	31
INS_USE_4: culture or background	13	24
Average	*14*	*30*

Question text	We want to know whether you would use brands that are mainly used by or associated with people who…	
	INS_USE_1	live by **different core values** than you.
	INS_USE_2	have **different solutions to societal problems** than you.
	INS_USE_3	have **different facts they rely on** than you.
	INS_USE_4	have **different culture, life experiences, or backgrounds** than you.
	Please read through the following scenarios and indicate for each whether you would or would not be willing to use, or continue using, the brand being described. *(Please select one response for each.)*	
Scale points	1. Very unwilling 2. Somewhat unwilling 3. Neither willing nor unwilling 4. Somewhat willing 5. Very willing 99. Don't know / Not sure	
Brand Scenarios	1. The brand is very good at solving your specific problems and satisfying your needs, but is primarily used by people who [INSERT DIMENSION OF DIFFERENCE] than you 2. A brand that other people would see you using in public that is primarily associated with people who [INSERT DIMENSION OF DIFFERENCE] than you 3. A brand you currently use that decides to start selling its products to people who [INSERT DIMENSION OF DIFFERENCE] than you	

About the Data:

French Data Model

In 2021, the translation of “government in general” in the French questionnaire was incorrectly changed to “authorities in general,” affecting data in all studies conducted in France from 2021 to 2023. When we discovered the inconsistency in early 2023, we suppressed all affected data while investigating the possibility of modeling and replacing the missing data.

Over the course of 2023, we built a data model that could reliably predict what the France data would have been if the translation were consistent. This involved identifying items (shown in the list on the right) that are predictive of trust in government in other Western democracies and testing whether they had similar predictive power in France.

To build a model with a sufficient level of accuracy, we iterated through 5,000 different randomly split samples, controlling for gender, income, age, and other demographics, of France data collected in the 2024 Edelman Trust Barometer and in the 2023 Special Report: Trust and Climate Change. In both surveys, we used the accurate translation for trust in “government in general,” along with the predictor variables. In both surveys, we also included the trust in “authorities in general” attribute for our French respondents. This allowed us to include the mistranslated variable in our model as one of the predictors for trust in government.

For each split sample, 75% of the sample was used to train the data, and the remaining 25% was used as a test group. Using a random forest classification model, we were able to accurately classify 89.41% of respondents as trusters or non-trusters, which gave us the confidence to repopulate the data in affected reports with data from our predictive model.

The modeled data was applied to the France data from each impacted year (2021, 2022, and 2023) to predict the overall level of trust in government in general. The Trust Index for those years has also been updated, given that trust in government is part of that calculation.

Predictors	Question text
Trust in institutions	**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 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.
	Media in general
	Business in general
	Non-governmental organizations (NGOs)
	Authorities in general
Economic optimism	**CNG_FUT:** Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years’ time?
Government competence	**TRU_3D_GOV:** To what extent do you agree with the following statement?
	Government in general is good at what it does
Fears of gig-economy	**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?
	Permanent jobs with benefits being replaced by freelance, gig-economy or short-term jobs that do not offer benefits
Government ethics dimensions	**GOV_PER_DIM:** In thinking about why you do or do not trust government in general, please specify where you think it falls on the scale between the two opposing descriptions.
	Highly effective agent of positive change
	Honest and fair
	Has a vision for the future that I believe in
	Serves the interests of everyone equally and fairly

Full Text for Shortened Answer Choices

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Full Text For Answer Choices Abbreviated

Domestic Brand Dominance: Preference for Home Country Brands Grows

TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior and not what you would do in a perfect world.

Shortened	Full
Headquartered in my country	It is a domestic brand headquartered in my country

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Full Text For Answer Choices Abbreviated

Relevance is Multi-Faceted: It's Not Just Pop Culture

BRD_CUL_REL. Beyond just offering products and services that people need, companies try to make their brands as relevant as possible to make it more likely that people will be attracted to them. We want to know what makes a brand relevant to you. For each of the following, please indicate whether it would be effective or not at making you feel that a brand was relevant to you.

Shortened	Full
Solves a problem I have	Solving a problem or satisfying a need that I have
Is innovative	Being innovative or cutting edge
Champions my values and beliefs	Championing values and beliefs that matter to me
Reflects my culture and background	Reflecting the cultural traditions and values that I grew up with
Addresses societal problems important to me	Addressing social or societal problems that are important to me
Talks about topics important to people who share my interests	Talking about topics that are important to people who share my hobbies and interests
Offers me ways to connect with people who share my interests	Offering me ways of connecting with other people who share my interest and passions
Creates enjoyable content	Creating online content that is enjoyable, entertaining, or fun to engage with
Creates advertising that makes me feel strong emotions	Creating marketing or advertising that causes me to feel strong emotions
Uses pop culture in its marketing or advertising	Using or incorporating popular culture in its marketing or advertising
Participates in convos about major news and events	Referencing or participating in conversations about major news and cultural events
Uses content creators I trust	Using or incorporating the content creators and influencers I trust in their marketing or advertising
Sparks discussion among creators I follow on social media	Sparking debate or discussion among the influencers or content creators I follow on social media

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Full Text For Answer Choices Abbreviated

Earned is The Most Powerful Way to Build Trust

TRU_SOURCE. Of the following ways you could learn about a brand, which one has the biggest impact on your willingness to trust the brand?

Shortened	Full
What people who are not paid by the brand say about it	What people who are not paid by the brand say (e.g., reviews, friends, online communities)
What the brand says about itself	What the brand says about itself (e.g., its advertising, website)
What independent organizations say about the brand	What independent organizations say about the brand (e.g., journalists, media, product analysts)
What people who are paid by the brand say about it	What people who are paid by the brand say (e.g., influencers, spokespeople)

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Full Text For Answer Choices Abbreviated

Experience Establishes Relevance for The Insular; Paid is More Powerful for The Open

BRD_COMS. Among the following places you might find information about a brand, please select all that fit each description below.

Shortened	Full
My own direct, personal experiences with the brand	My own direct, personal experiences or interactions with the brand or product
The brand's advertising	The brand's advertising that I see on TV, streaming, website, or apps
Social media posts from paid creators	Social media posts from creators or influencers who are being paid to talk about the brand

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Full Text For Answer Choices Abbreviated

Relevance Conversation Has to Start Within Insular Trust Circles

TRU_SPK. How much do you trust each of the following to give you accurate information about a brand?

Shortened	Full
Someone like me	A person like yourself who regularly uses the brand
Credentialed expert	A credentialed expert such as a doctor or scientist
People who leave reviews	People who leave reviews about a brand’s products or services
Brand employees	An employee of the brand
Brand CEOs	The CEO of the brand
Celebrities	A celebrity or sports star

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Full Text For Answer Choices Abbreviated

Creators Can Drive People to Action

INFLU_ACT. Which of the following have you done in the last six months because of the content creators you follow?

Shortened	Full
Engaged in self-improvement	Engaged in self-improvement (e.g., broke a bad habit or started a healthy new habit)
Started a new hobby	Started a new hobby or began exploring a new interest