



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

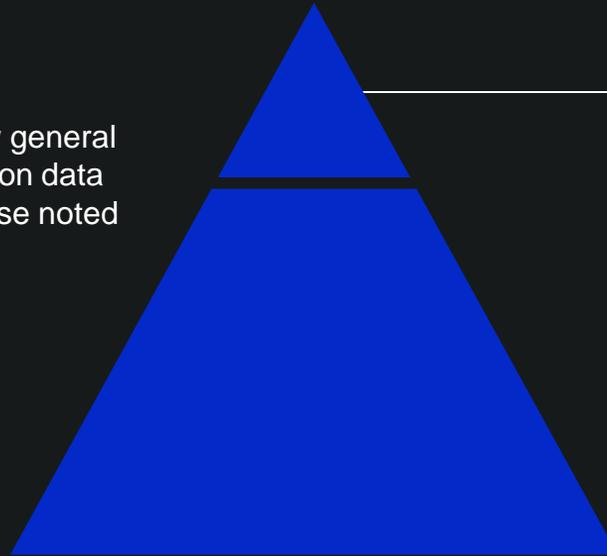
1,150

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

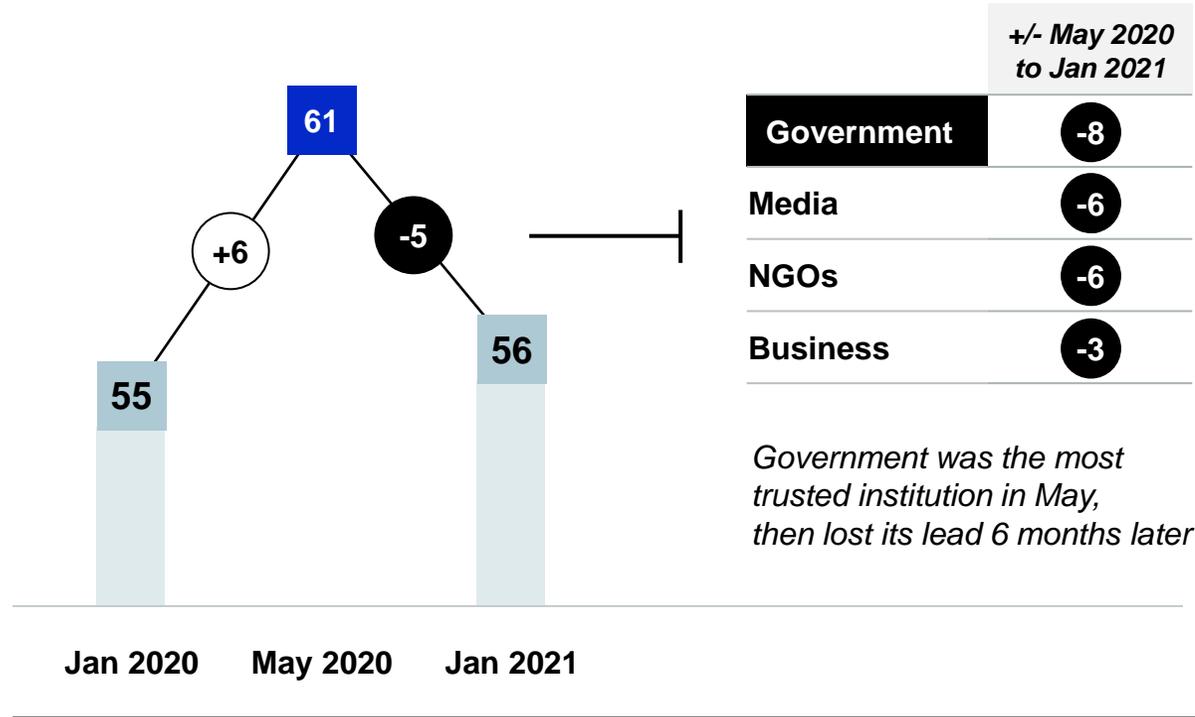
1,500 U.S. respondents, fielded December 14 to 18, 2020

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.

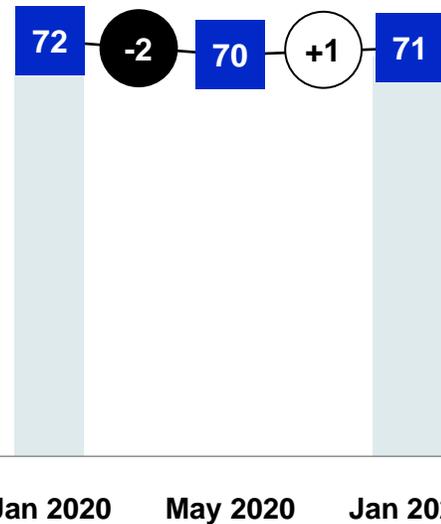
TRUST DECLINES ACROSS ALL INSTITUTIONS EXCEPT BUSINESS FOLLOWING SPRING SURGE

Percent trust in Mexico

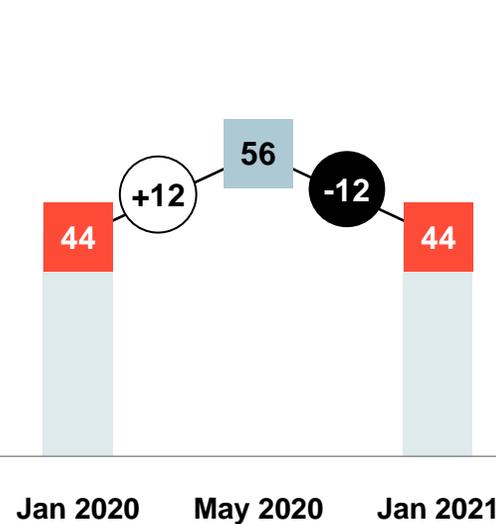


Business

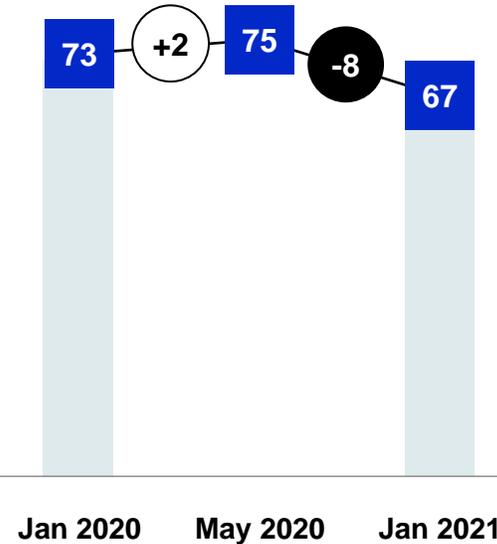
Business trust least volatile



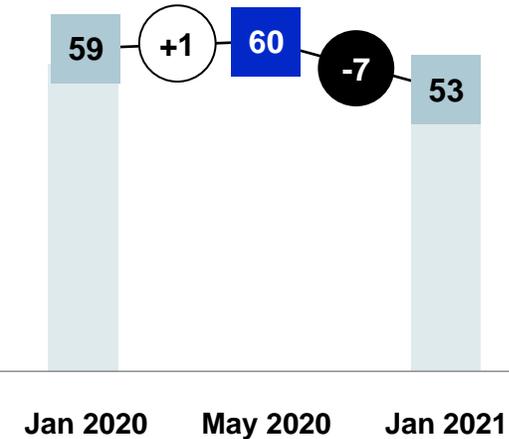
Government



NGOs

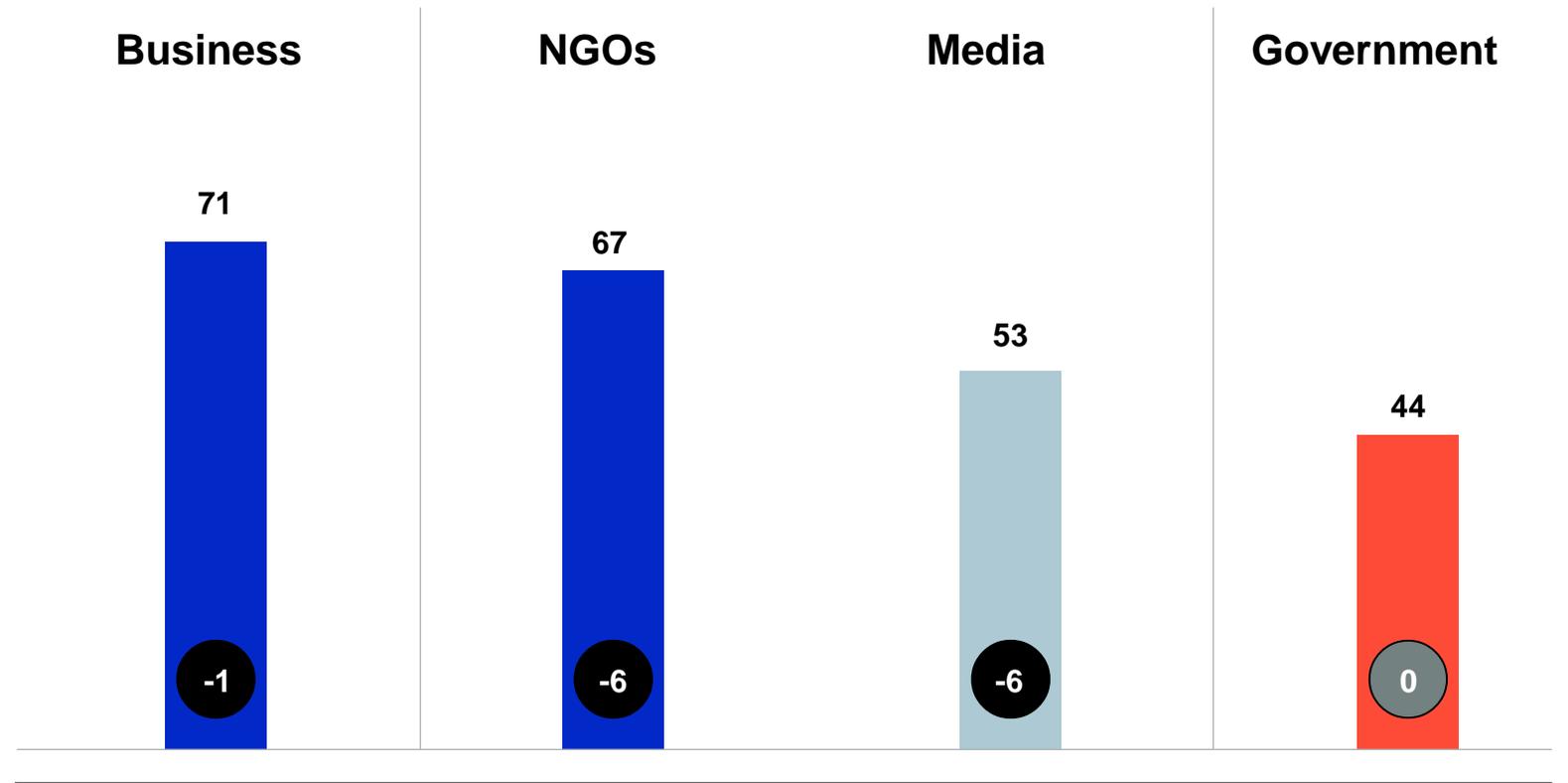


Media



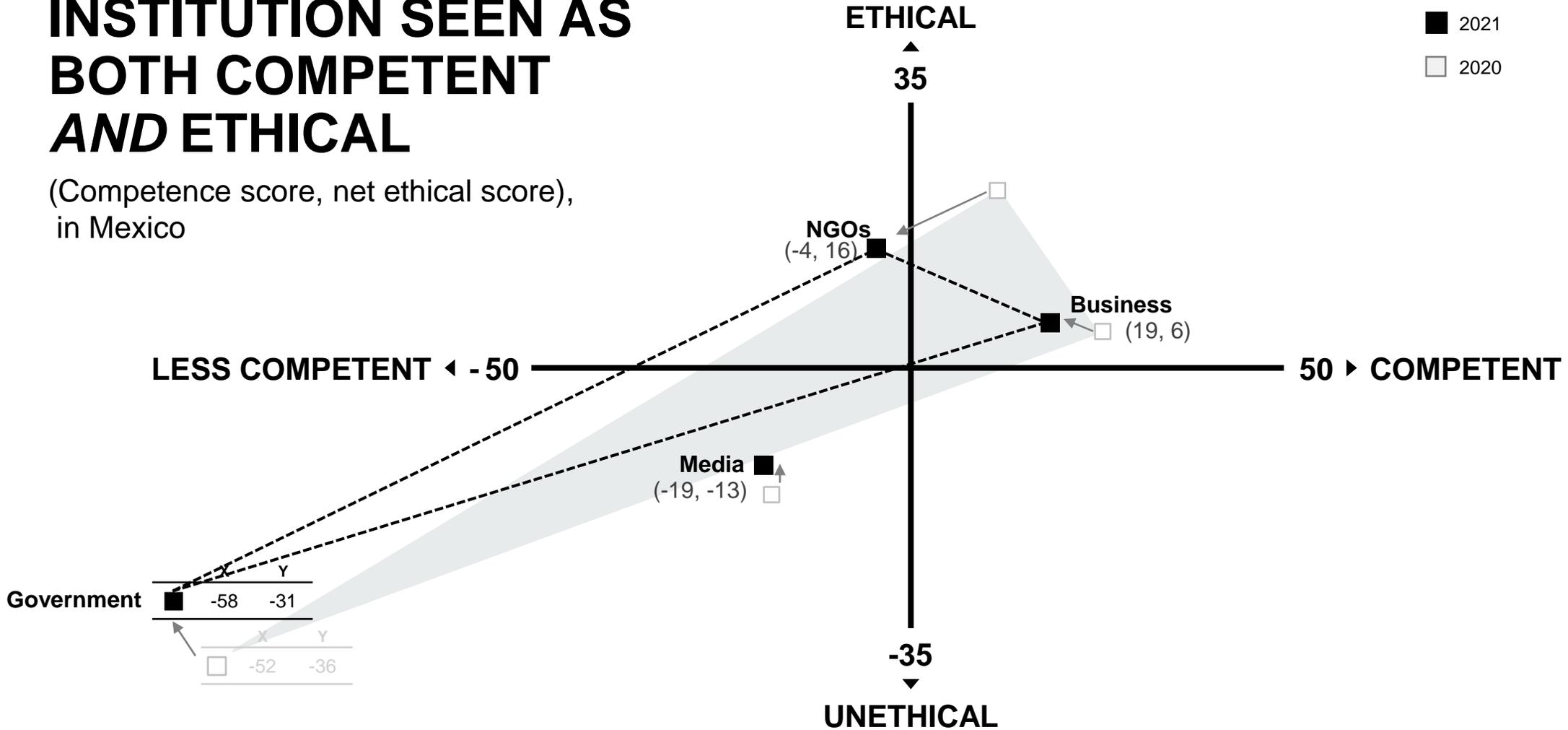
IN MEXICO, BUSINESS MOST TRUSTED INSTITUTION

Percent trust, in Mexico



BUSINESS NOW ONLY INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL

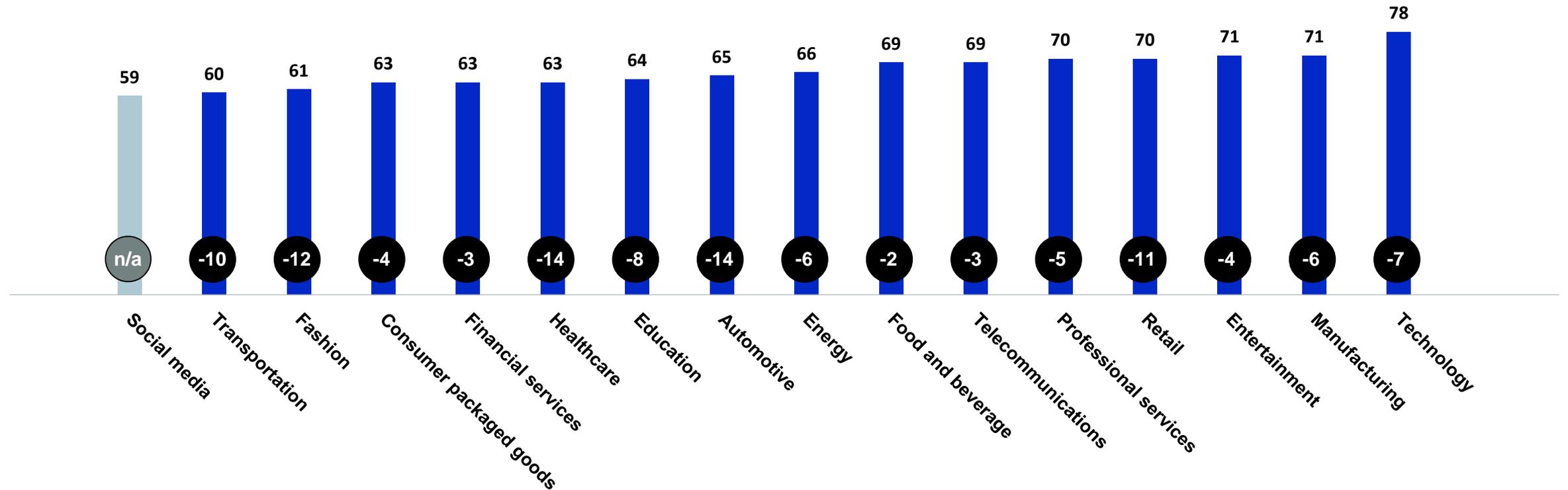
(Competence score, net ethical score),
in Mexico



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, Mexico. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

TRUST DECLINES ACROSS SECTORS

Percent trust in each sector, in Mexico



TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

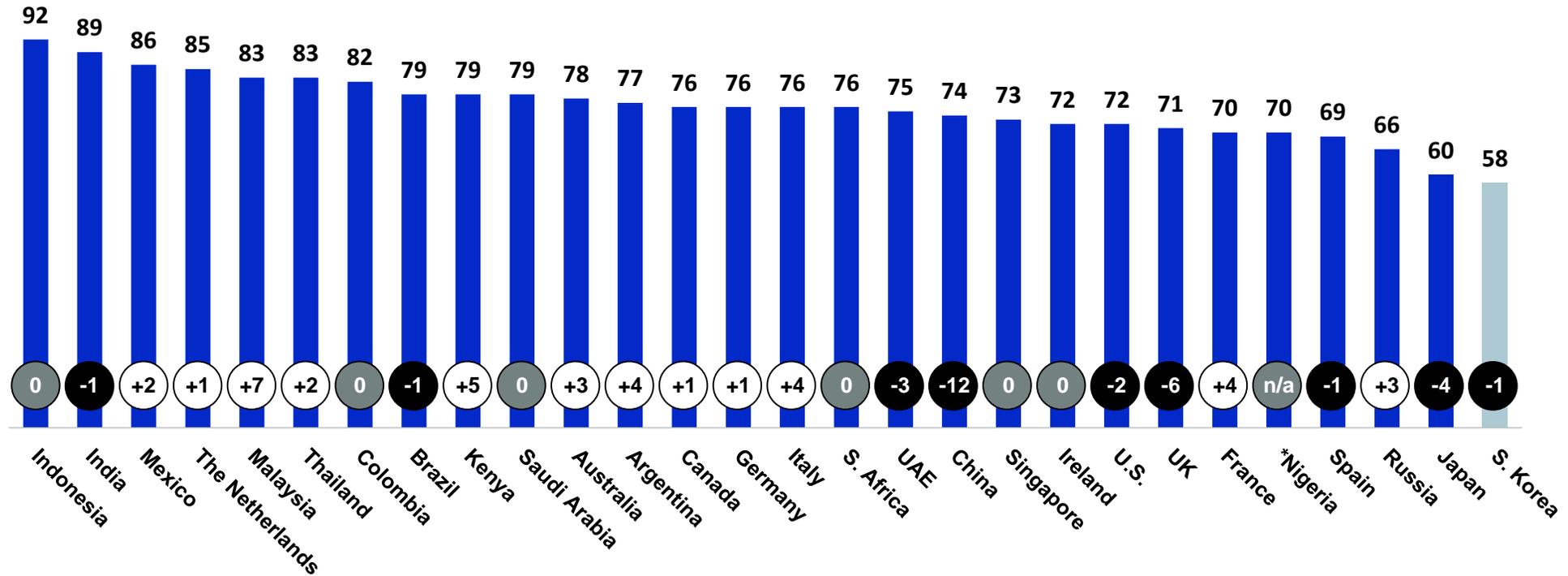
Percent trust in my employer



Mexico



Trust in my employer stable or rising in 18 of 27 countries



TRUST INEQUALITY SPREADS FURTHER

Trust Index



Mass population 16 points less trusting

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. Informed public and mass population, 27-mkt avg. *Nigeria not included in the global average

2021 Informed public



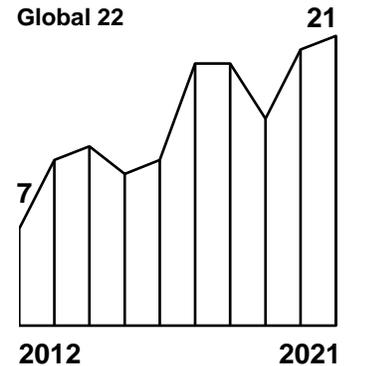
2021 Mass population | Trust gap



Record trust inequality

DOUBLE-DIGIT TRUST INEQUALITY IN RECORD NUMBER OF COUNTRIES

Nr. of countries with double-digit trust inequality

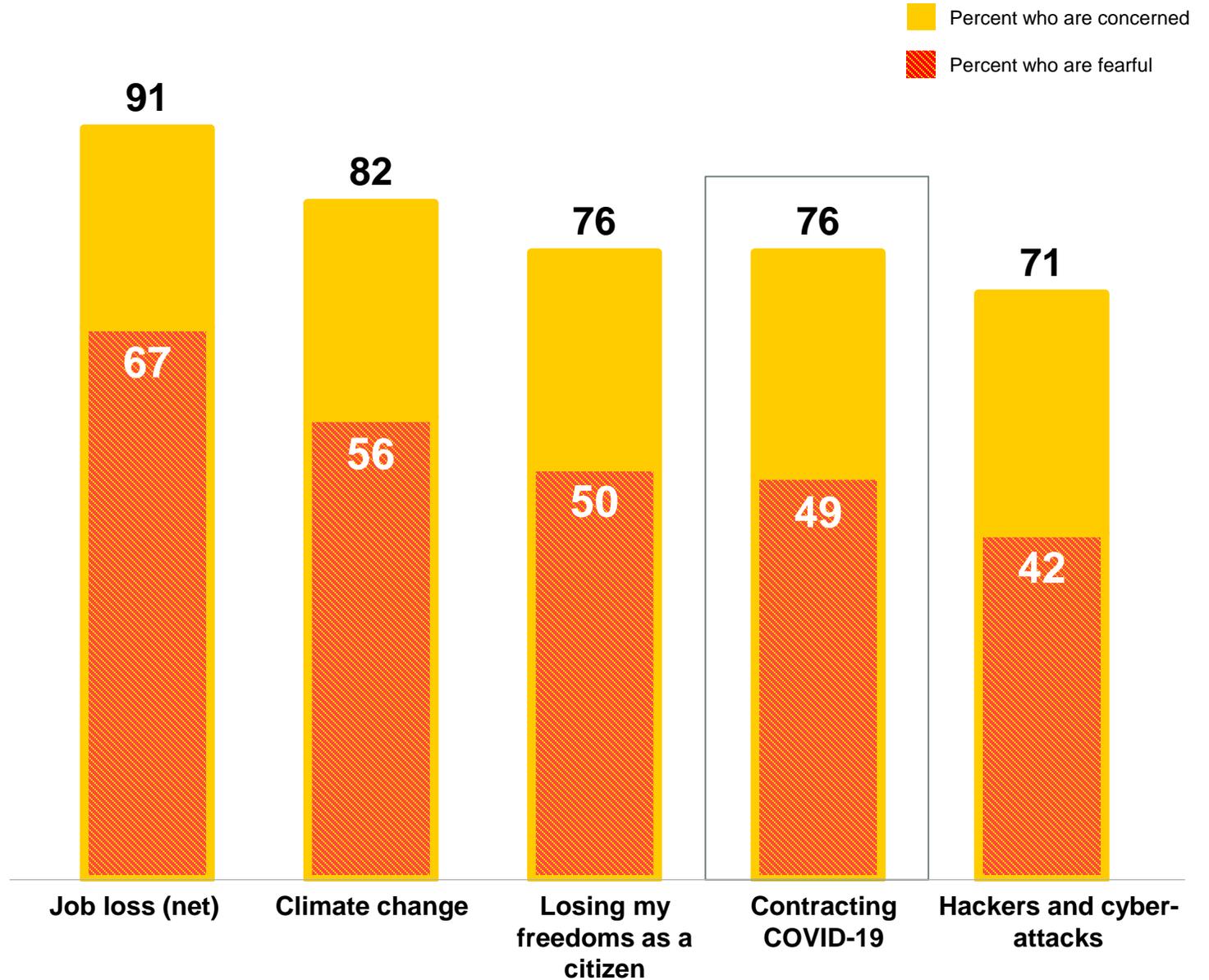




⊥
**PANDEMIC
FURTHER FUELS FEARS**
⊥

PANDEMIC ADDED TO PERSISTENT PERSONAL AND SOCIETAL FEARS

Percent who are concerned, and percent who are fearful, in Mexico



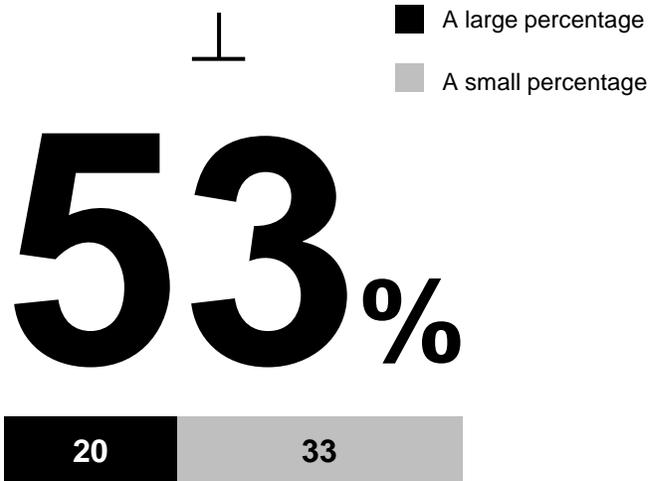
2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes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



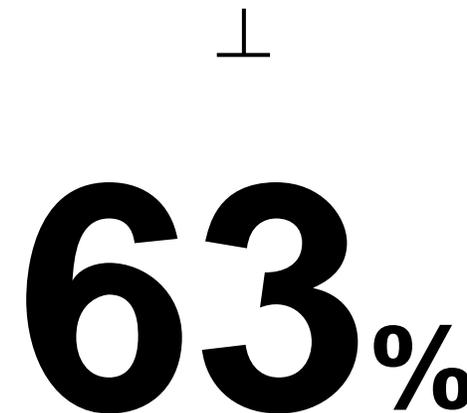
PANDEMIC ACCELERATES JOB LOSS FEARS

Percent who agree, in Mexico

As a result of the of the pandemic, a portion of our workforce has seen their **work hours reduced or their jobs eliminated**



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



2021 Edelman Trust Barometer. LAY_OFFS. Has the organization you work for had to lay-off or furlough any employees as a result of the economic impact of the pandemic? Code 1, yes, a large percentage; code 2, yes, a small percentage. Question asked of those who are an employee (Q43/1). Total layoff/furlough percentage is a sum of code 1 and 2. SOC_AGR. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Mexico.

INCREASED URGENCY TO ADDRESS FOUNDATIONAL PROBLEMS

Change in importance since last year
(more important minus less important)

2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it 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. General population, Mexico. Net change is the difference between more and less important.

<i>Change in importance since last year, in Mexico</i>	Net change	More Important	Less Important
Improving our healthcare system	+74	80	6
Improving our education system	+71	77	6
Addressing climate change	+70	75	5
Addressing poverty in this country	+66	72	6
Protecting people's individual freedoms	+63	69	6
Addressing discrimination, racism	+60	67	7
Closing the economic and social divide	+60	67	7
Finding ways to combat fake news	+60	68	8



⊥

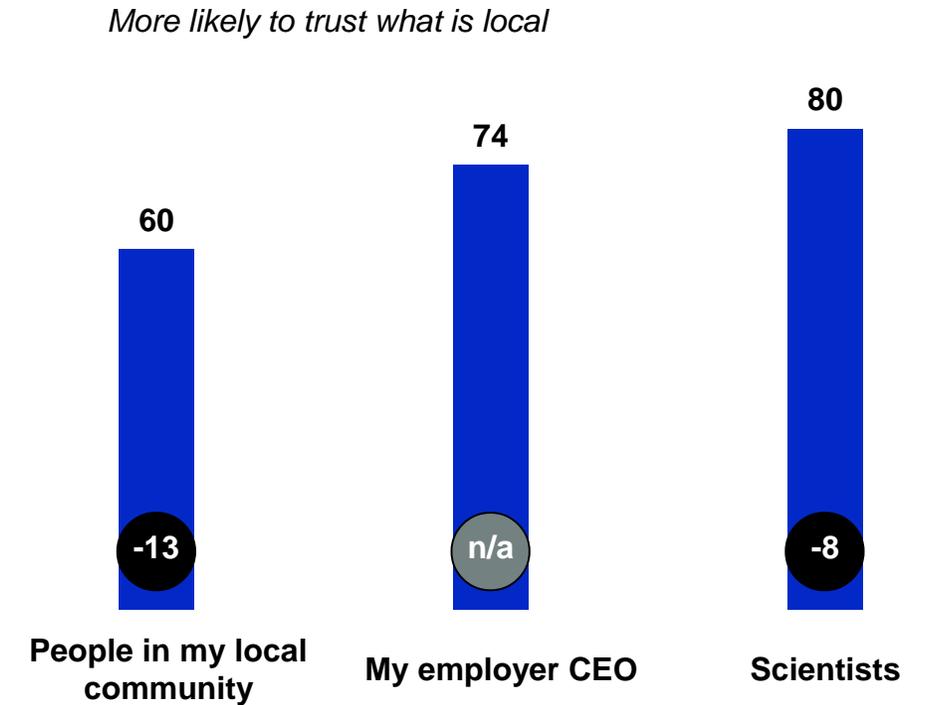
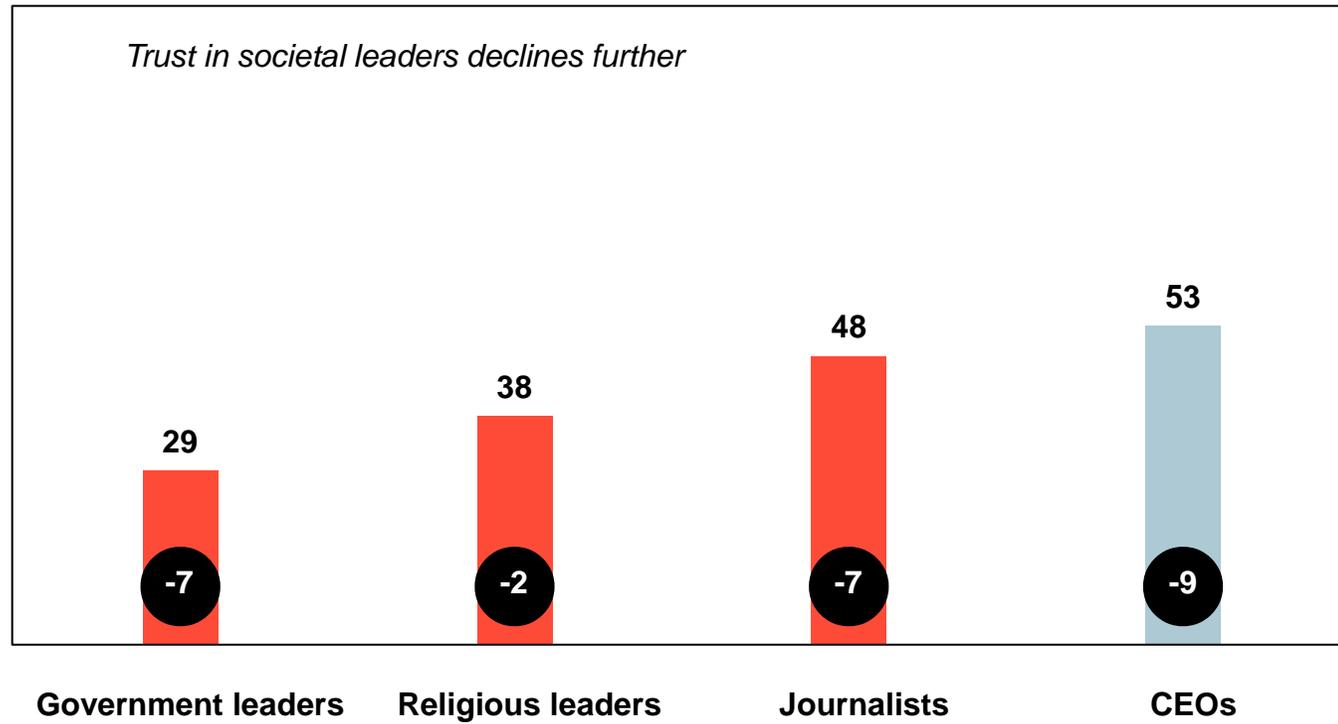
CRISIS OF LEADERSHIP

⊥



SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust, in Mexico



SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Percent who worry, in Mexico

Our government leaders are **purposely trying to mislead** people by saying things they know are false or gross exaggerations

⊥

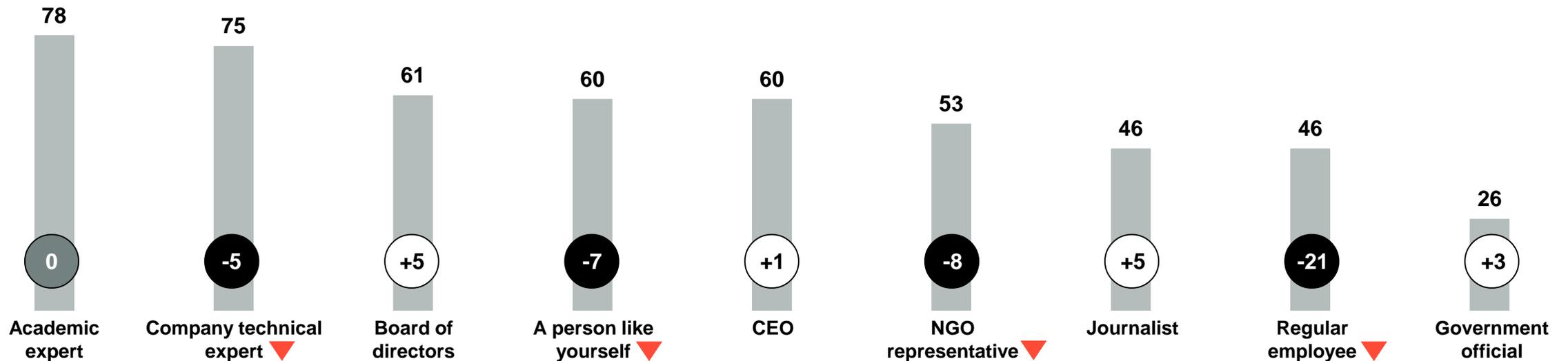
73%



SPOKESPEOPLE LOSE CREDIBILITY

Percent who rate each as very/extremely credible as a source of information about a company, in Mexico

● Change, 2020 to 2021 | ▼ All-time low



2021 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? 4-point scale; top 2 box, credible. Question asked of half of the sample. General population, Mexico.

NO VACCINE

MY BODY

NEEDED

MY CHOICE

I HAVE

~~AN~~

FAKE

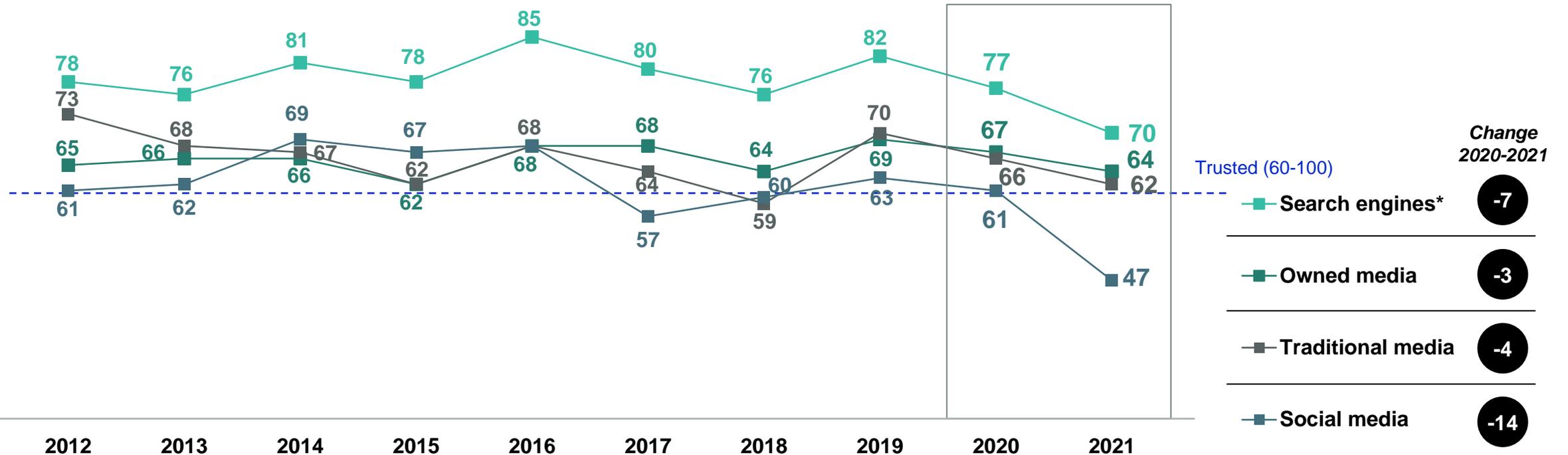
IMMUNE
SYSTEM

NEWS
RTE

↑
RAGING INFODEMIC
FEEDS MISTRUST
↓

SOCIAL MEDIA ONLY INFORMATION SOURCE NOT TRUSTED

Percent trust in each source for general news and information, in Mexico



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, Mexico.

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

NEWS ORGANIZATIONS SEEN AS BIASED

Percent who agree, in Mexico

Journalists and reporters are **purposely trying to mislead** people by saying things they know are false or gross exaggerations

69%

Most **news organizations** are more concerned with **supporting an ideology** or political position than with informing the public

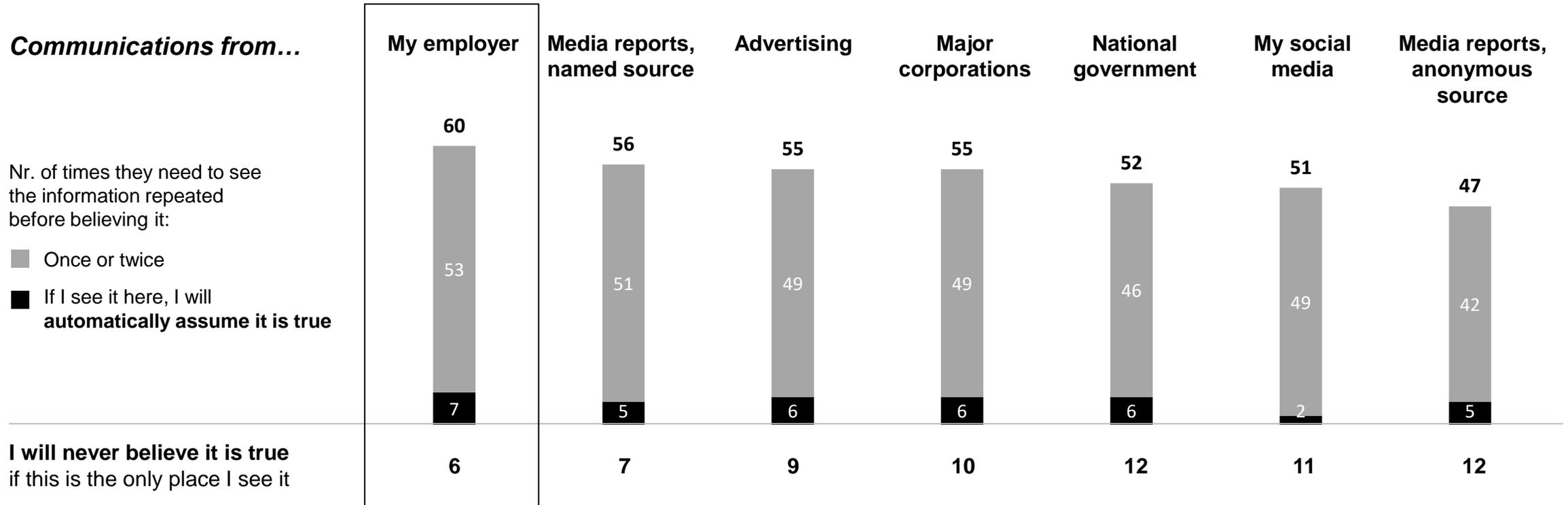
71%

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. Attributes shown to half of the sample. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. PER_MED. How well do you feel the media is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; bottom 3 box, not doing well. Question asked of half of the sample. General population, Mexico.



MY EMPLOYER OWNED MEDIA MOST BELIEVABLE

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



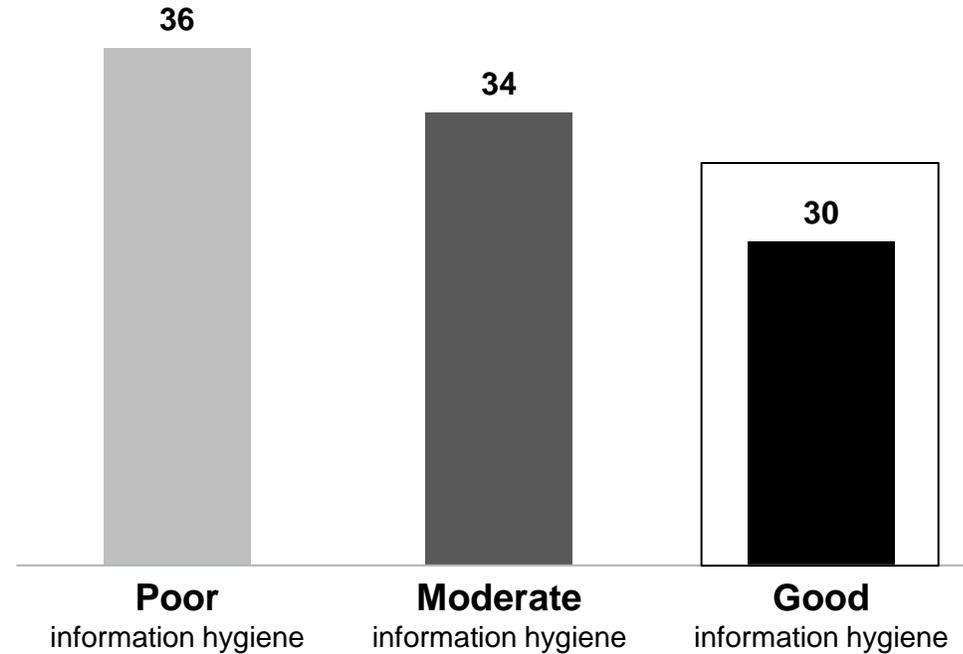
2021 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half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

IN MEXICO, ONLY 1 IN 3 HAVE GOOD INFORMATION HYGIENE

Percent in each segment

Information hygiene:

1. News engagement
2. Avoid information echo chambers
3. Verify information
4. Do not amplify unvetted information



60% of respondents **share or forward news items** that they find to be interesting.

Of those, **only 36%** have good information hygiene



+

HIGH STAKES FOR PUBLIC HEALTH AND THE ECONOMY

T

VACCINE HESITANCY REMAINS A MAJOR HURDLE

Percent who say they will take the COVID-19 vaccine within the next year

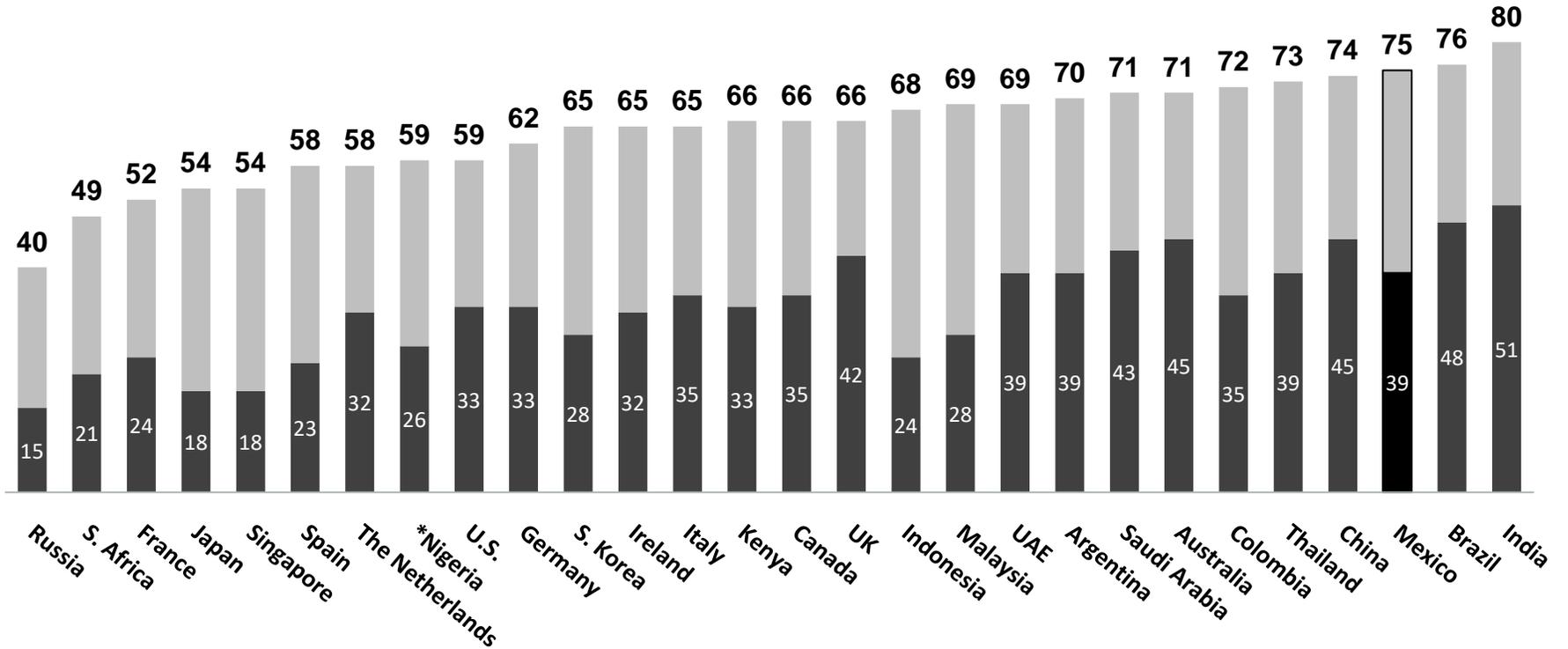
Global 27

64%

Willing to vaccinate...

31	Six months to one year
33	As soon as possible

Only 1 in 3 ready to take the vaccine as soon as possible



2021 Edelman Trust Barometer. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

PANDEMIC FEARS IMPEDE RETURN TO WORKPLACE

Percent who say each reason is why they are choosing to work from home vs. choosing to return to the workplace, in Mexico

44% choosing **to work at home**, for the following reasons:

56% choosing to **return to the office**, for the following reasons:

COVID-19 risk while commuting/in office (net) **66**

My employer made me feel safe **43**

I am more productive **22**

I am more productive **46**

Enhanced work-life balance **26**

Healthy work-life balance **23**

2021 Edelman Trust Barometer. WRK_CHOICE. Which of the following best describes your current working situation? Question asked of those who are an employee (Q43/1). Data among employees that have a choice of working from home or their workplace. WHY_HOME. Why are you choosing to continue working from home even though you could return to the workplace if you wanted to? Select all that apply. Question asked of employees that are choosing to work from home (Q43/1 AND WRK_CHOICE/3). WHY_OFFICE. Why are you choosing to work at an office or other workplace even though you could work remotely if you wanted to? Select all that apply. Question asked of employees that are choosing to return to their workplace (Q43/1 AND WRK_CHOICE/4). General population, Mexico. COVID-19 risk while commuting / in office is a net of WHY_HOME/2-3.

⊥

A NEW MANDATE FOR BUSINESS

⊥

IMAGINE

BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Percent who agree, in Mexico

CEOs should step in
when the government does not fix societal problems

⊥
72%

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

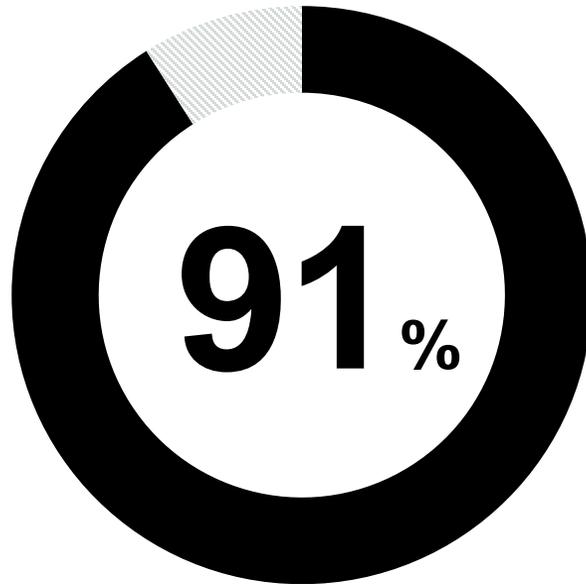
⊥
66%

CEOs should hold themselves accountable to the public and not just to the board of directors or stockholders

⊥
52%

CEOS MUST LEAD ON SOCIETAL ISSUES

Percent in Mexico who expect **CEOs to publicly speak out** about one or more of these societal challenges



Societal issues	60
Pandemic impact	58
Job automation	55
Local community issues	43

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%

EMERGING FROM INFORMATION BANKRUPTCY

1

Business: Embrace expanded mandate

CEOs must lead on issues from sustainability and systemic racism 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

All institutions must provide truthful, unbiased, reliable information.

4

Don't go it alone

Business, government, NGOs and others must find a common purpose and take collective action to solve societal problems.