

Special Report:
The Belief-Driven
Employee



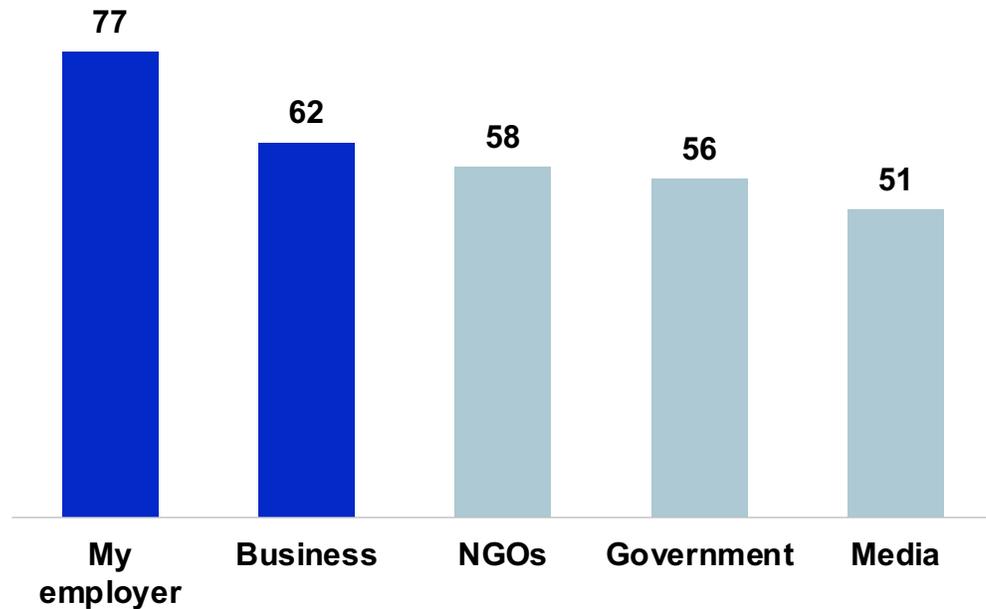
Edelman Trust Barometer 2021



A CRITICAL ROLE FOR EMPLOYERS

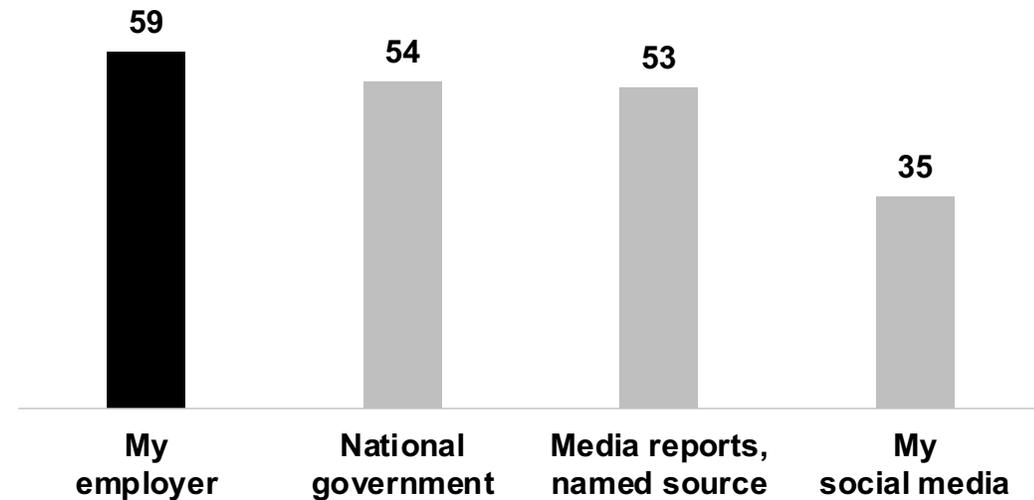
MY EMPLOYER MOST TRUSTED INSTITUTION

Percent trust



EMPLOYER MEDIA MOST BELIEVABLE

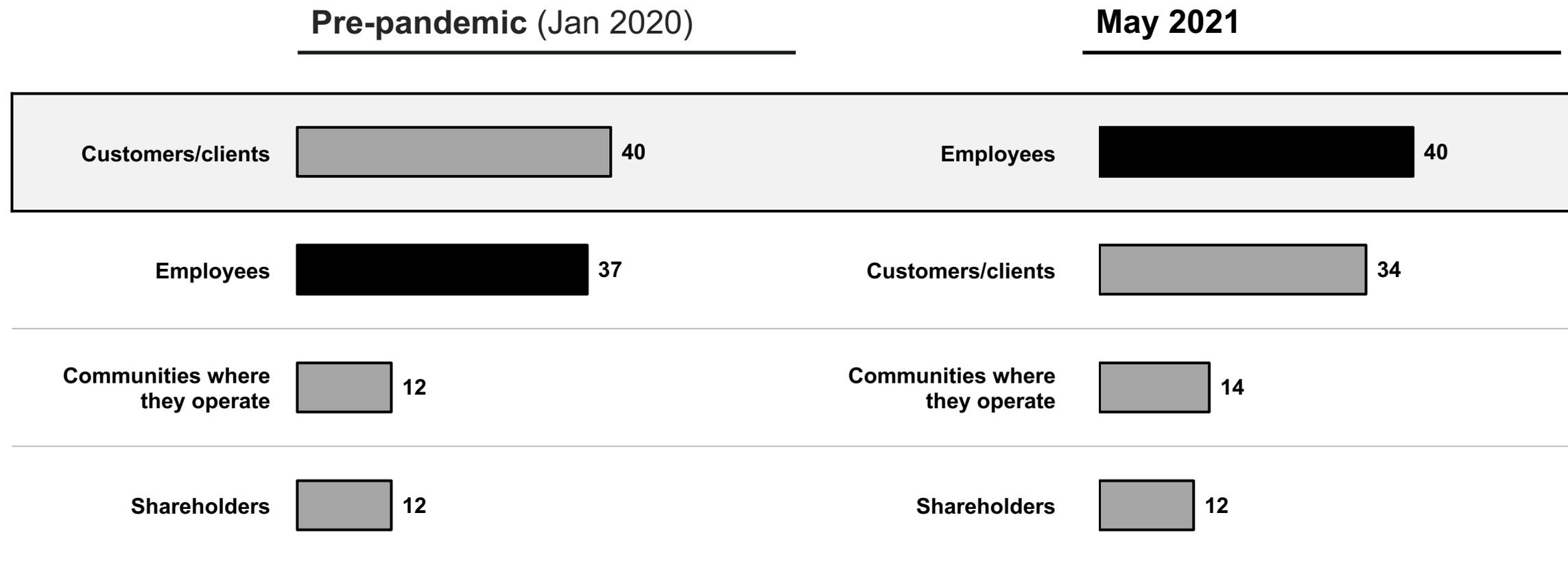
Percent who believe information from each automatically, or after seeing it twice or less



2021 Edelman Trust Barometer Spring Update: A World in Trauma. 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. "Your employer" asked among those who are employed (Q43/1). 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, 14-mkt avg. "Employer communications" only asked of those who are an employee (Q43/1).

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.

The Belief-Driven Employee

7-market online survey

- 7,000 employees (1,000 per market)
- Brazil, China, Germany, India, Japan, UK and U.S.
- The sample was weighted to be representative of employee demographics across age, gender and region, using a historical analysis of previous Trust Barometer data

Timing of Fieldwork: August 3 – August 12, 2021

All data in this report is a subset of the employee sample collected – looking at those employed at an organization or corporation

Margin of error – reported sample:

- 7-market global data margin of error: +/- 1.2% (n=6,446)
- Market-specific data margin of error: +/- 3.1% to 3.4% (n=min 842, varies by market)

ANXIETY ABOUT JOB LOSS REMAINS HIGH

Percent who worry

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

- Looming recession*
- Lack of training/skills*
- Freelance/gig economy*
- Automation*
- Cheaper foreign competitors*
- International conflicts*
- Jobs moved to other countries*
- Immigrants who work for less*

(net)
78%
Change,
Jan 2020 to
Aug 2021
-3
pts

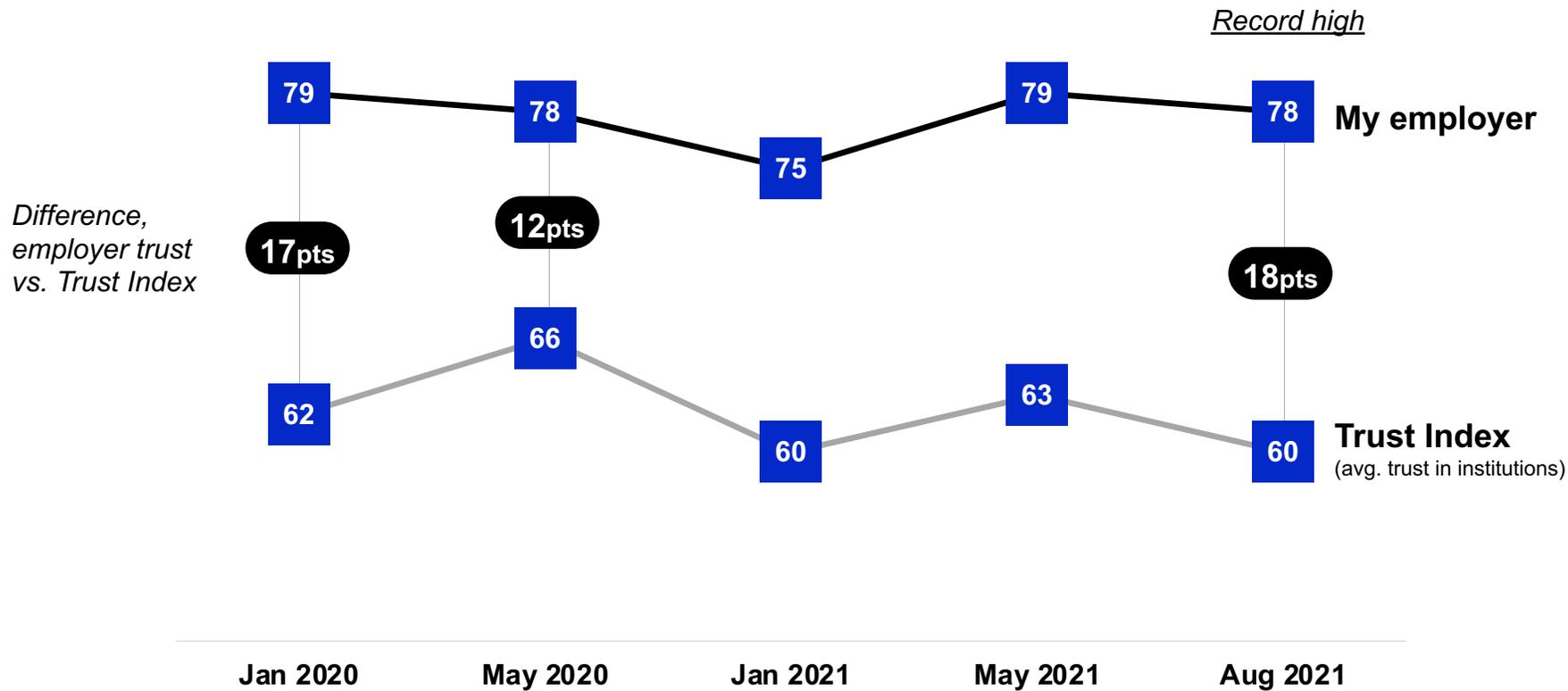
I worry that the **pandemic will accelerate the rate at which companies move to replace human workers with AI and robots**

49%

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worried. Question asked of half of the sample. 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. 7-mkt. avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1). "Losing my job" is a net of attributes 1-5, 22-24 at POP_EMO.

EMPLOYER TRUST ADVANTAGE AT RECORD HIGHS

Percent trust, among employees



Business	67
NGOs	60
Government	56
Media	55

2021 Edelman Trust Barometer Special Report: **The Belief-Driven Employee**. 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. "Your employer" asked among those who are employed (Q43/1). 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

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PANDEMIC RAISES STAKES FOR EMPLOYER TRUST

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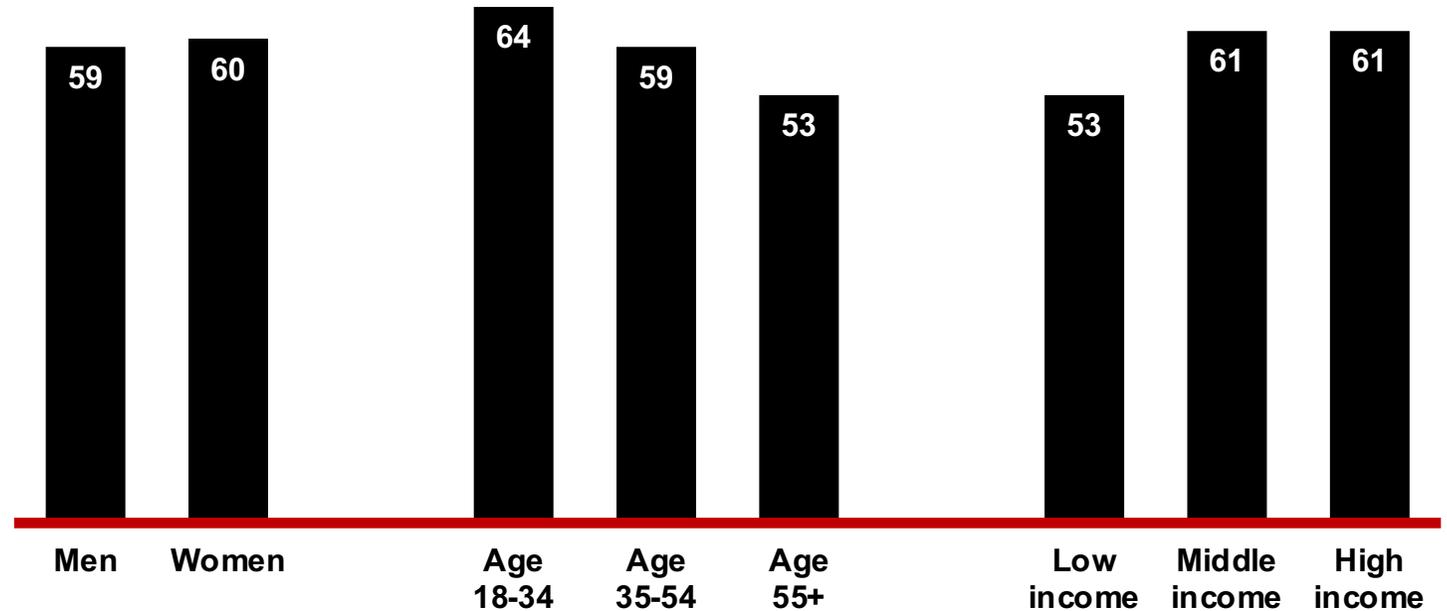
PANDEMIC ACCELERATES POWER SHIFT TO EMPLOYEES

60%

Which do you agree with more?

Compared to before the pandemic, **our employees have more power and leverage** when it comes to creating change within our organization

or
our employees have *less* power and leverage



JOB SEEKERS ARE RAISING THE BAR

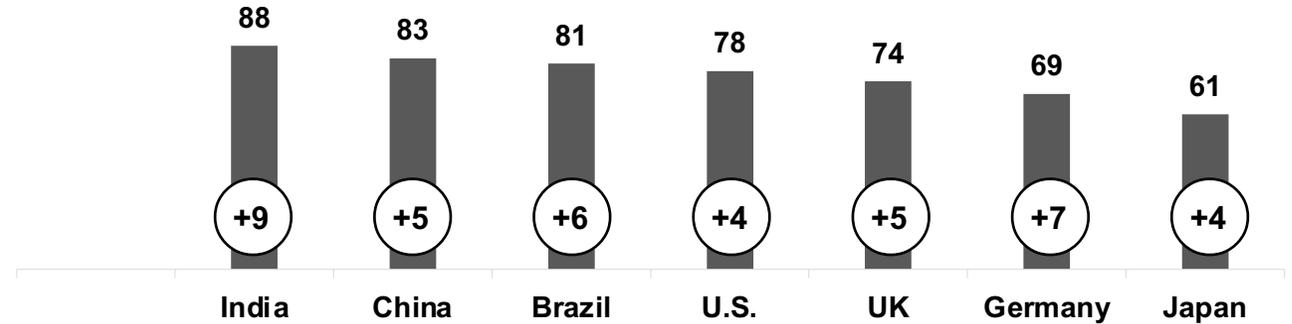
Average percent who say each is a strong expectation or a deal breaker when considering a job



Change, Jan 2019 to Aug 2021

I have **higher expectations for a prospective employer** than I did three years ago

Markets



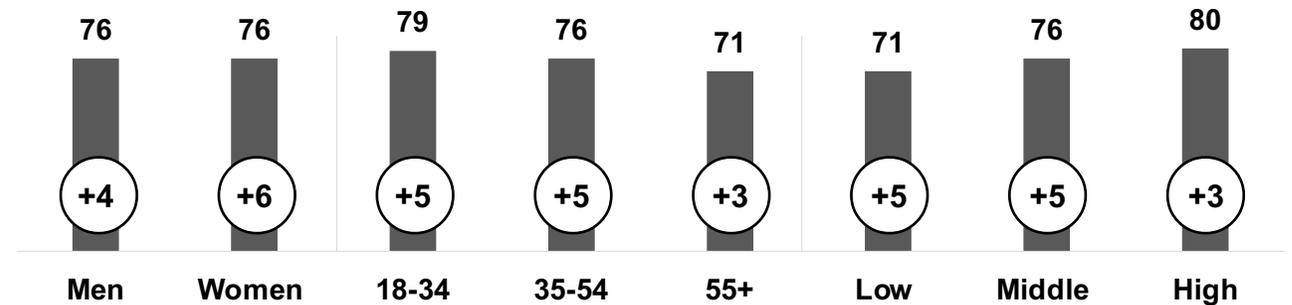
Average, global 7

76%



Change, Jan 2019 to Aug 2021

Gender | Age | Income



2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item using the scale below. 3-point scale; top 2 box, important. 7-mkt avg., and by demographics. Data is an average across all 17 attributes. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

1 IN 5 QUITTING THEIR JOBS

Percent who say they have left their job in the last six months, or plan to do so in the next six months

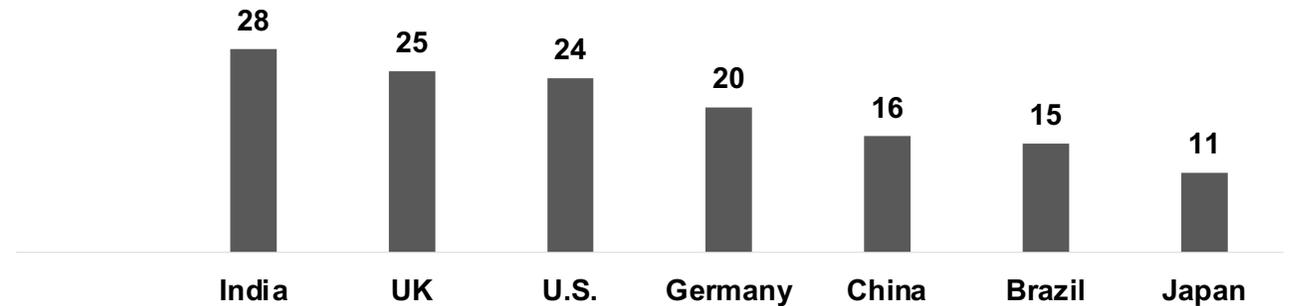
I plan to or have done one of these within the last or next six months

Quit my current job and **look for or start a new one**

Quit my current job to **start my own business**

Retire and stop working

Markets

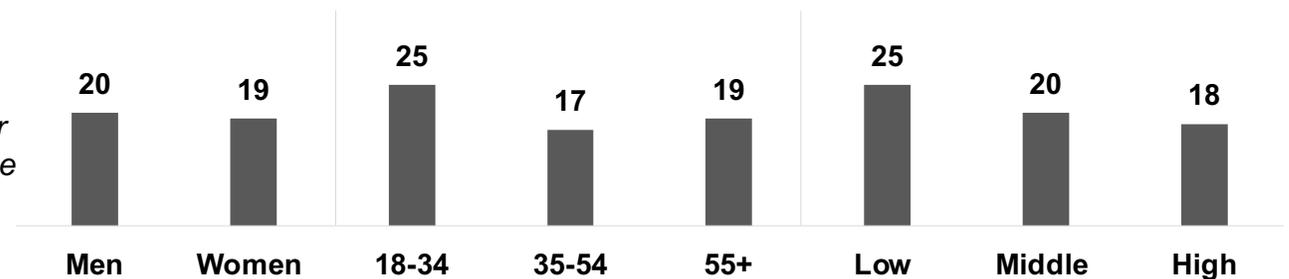


Global 7

20% (net)

Highest turnover for younger, low income

Gender | Age | Income



BURNOUT NOW A BOTTOM-LINE ISSUE

Percent who say

During the pandemic, **I have increased my value to my employer** by taking on more work and responsibility

My employer is not doing well on **taking the issue of employee burnout seriously** and actively taking steps to prevent it

62%

43%

*Among those who feel that their employer isn't addressing burnout, **25%** have quit, or will quit their job in the next six months*

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee (Q43/1). PER_EMP. How well do you believe your employer 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 those who are an employee (Q43/1). 7-mkt avg. JOB_ATT. Which of the following best describes your job situation? Net of attributes 2, 3, 4, and 6. 7-mkt avg, among those who said their employer is not doing well at taking burnout seriously (PER_EMP bottom 3 box). All data is filtered to be among employees who work for an organization or corporation (Q43/1).

THOSE LEAVING WANT SHARED VALUES AND BETTER LIFESTYLE FIT, MORE THAN HIGHER PAY

Percent of those who are currently changing jobs who say each is a reason why they are leaving/looking to leave

Better fit with my values

59%

Better fit for my lifestyle

50%

Better compensation or career advancement

31%

least likely to be a reason for leaving

Net agreement, in rank order

- Want a job that's more personally fulfilling
- Want to go where they feel more valued
- Want something entirely new
- Want more continuous learning
- Want a more socially engaged organization
- Want a more inclusive culture

- Want better work-life balance
- Want a job less likely to lead to burnout
- My employer requiring that I return to an office
- Want a safer workplace
- Too difficult or unsafe to work in the country where I was/am employed

- Looking to earn more money or get better benefits
- Looking to move up and advance my career

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. ATT_WHY. Which of the following best describe the specific reasons why you have left, or are looking to leave, your current job? Pick up to three. Question asked among those who have or plan to alter their current employment situation (JOB_ATT/2-4;6). 7-mkt avg. "Better fit my values" is a net of attributes 4, 7, 8, 10, 11, 17; "Better fit for my lifestyle" is a net of attributes 3, 5, 6, 15, 18; "Better compensation or career advancement" is a net of attributes 1 and 2. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

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EMPLOYEES NOW POWERED BY BELIEFS

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ALL JOB EXPECTATIONS RISE; 7 IN 10 EXPECT OPPORTUNITIES FOR SOCIAL IMPACT

Average percent who say each is a strong expectation or a deal breaker when considering a job



Change, Jan 2019 to Aug 2021

Career advancement

82%



Average agreement, in rank order

- Competitive wages
- Valuable work experiences and training
- Opportunities to move up

Personal empowerment

77%



- Regular, truthful communication
- Easy for employees to give input
- Include employees in the planning process
- CEO embodies the values of the organization
- Employees reflect customer diversity
- Will not promote those who do not live up to company values

Social impact

71%

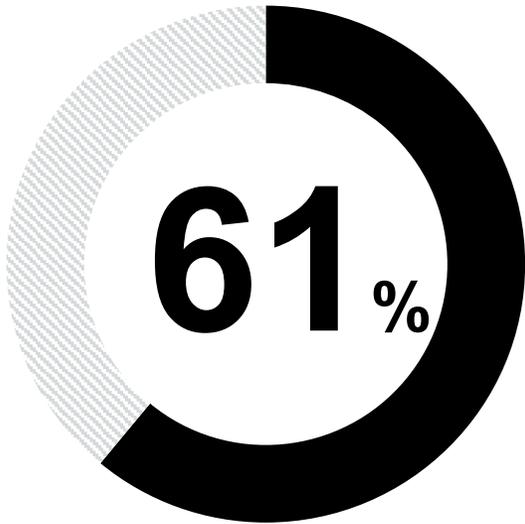


- Business reflects my values
- Has a greater purpose
- Meaningful work that shapes society
- Opportunities to address social problems
- Would stop engaging in specific business practices if employees objected
- CEO addresses controversial issues I care about

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item using the scale below. 3-point scale; top 2 box, important. 7-mkt avg. "Career advancement" is an average of attributes 1-4; "Personal empowerment" is an average of attributes 5-11; "Social impact" is an average of attributes 12-17. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

6 IN 10 CHOOSE THEIR EMPLOYER BASED ON BELIEFS

Percent who choose employers based on their values and beliefs



Choose, leave, avoid or consider employers based on their values and beliefs



I would never work in some industries because they are **fundamentally immoral**

I will not work at a company if I **disagree with their stand on social issues**

Organizations I choose to work for are one **important way I express my opinions on issues**

I am more interested in working for an organization that **prides itself on being socially responsible** vs. its marketplace success

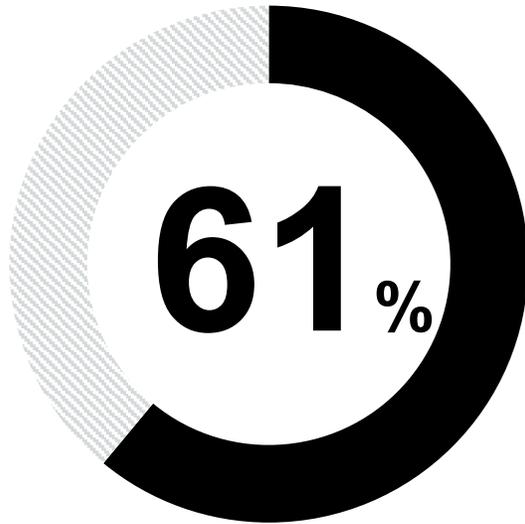
I've left a job and taken another because **I liked the values** of one more than the other

I've taken a job solely because I appreciated its **positions on controversial issues**

I've left my job solely because the organization **remained silent on an issue** they had an obligation to address

MAJORITY NOW CHOOSE JOBS ON BELIEFS ACROSS MOST COUNTRIES AND DEMOGRAPHICS

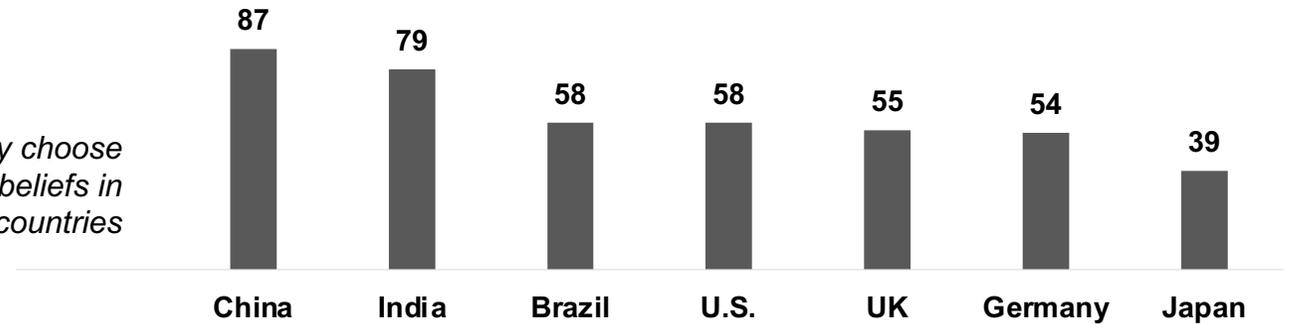
Percent of employees who choose jobs based on their values and beliefs



Choose, leave, avoid or consider employers
based on their values and beliefs

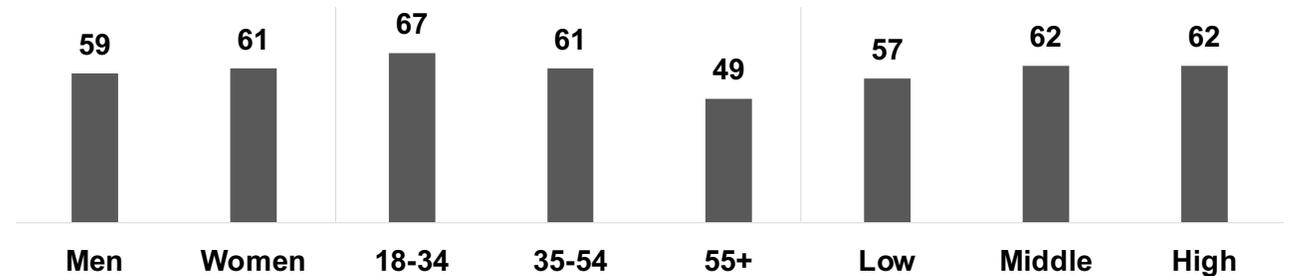
Markets

Majority choose jobs on beliefs in 6 of 7 countries



Gender | Age | Income

Young employees most likely to choose jobs on beliefs



EMPLOYEES NOW EMBOLDENED TO DRIVE CHANGE

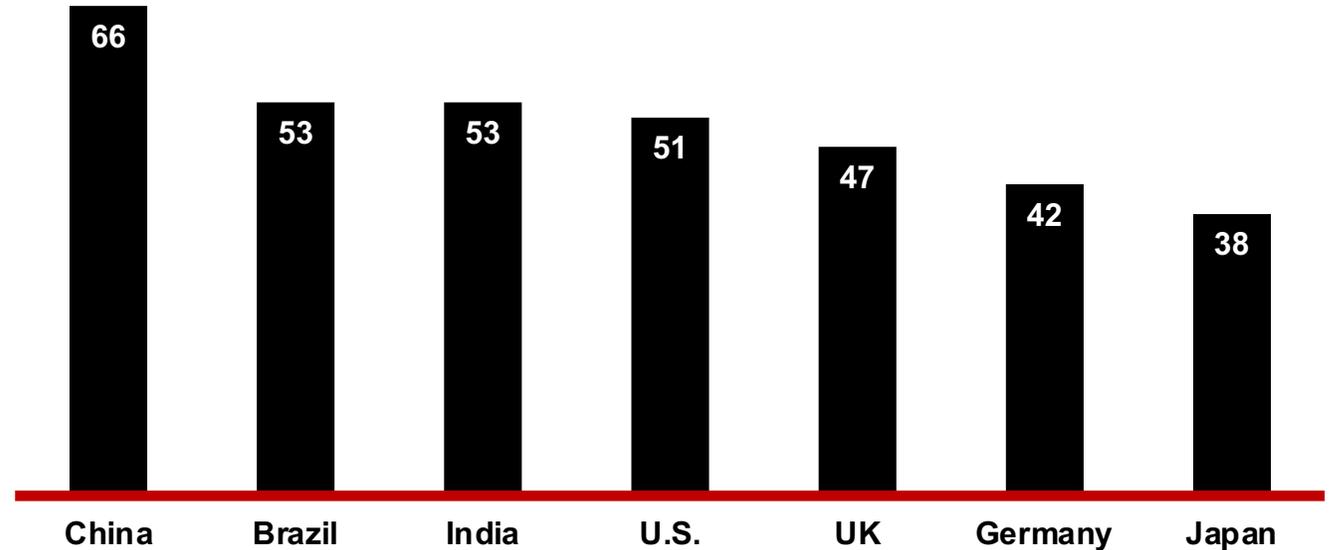
50%

Which do you agree with more?

A large group of employees exerting strong pressure within our organization **can get it to change almost anything about itself**

or -----

cannot force our organization to change anything that the organization itself does not want to change



WORKPLACE ACTIVISM BECOMES THE NORM

Percent who will take action

I will take action
to produce or motivate
urgently necessary changes
within my organization

76%

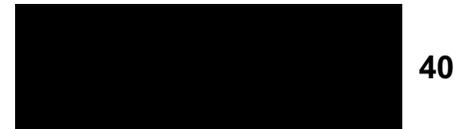
Work within the system

Petition senior management to make changes
Suggest changes to direct manager or HR
Send internal comms to senior management



Take it public

Whistleblowing
Go on strike or work slow-down
Leak internal documents or emails
Social media campaign
Protest outside our offices or factories

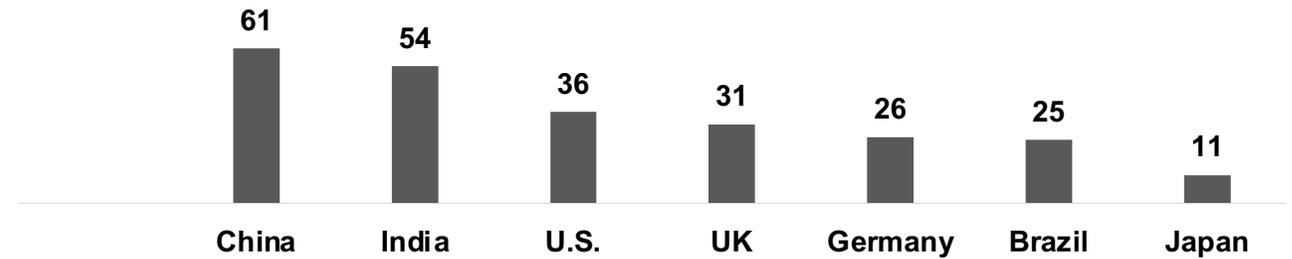


1 IN 3 HAVE LEFT THEIR JOB BECAUSE THEIR EMPLOYER FAILED TO TAKE A STAND

Percent who agree

I have left my job at an organization solely because it remained silent on a societal or political issue that I believed it had an obligation to publicly address

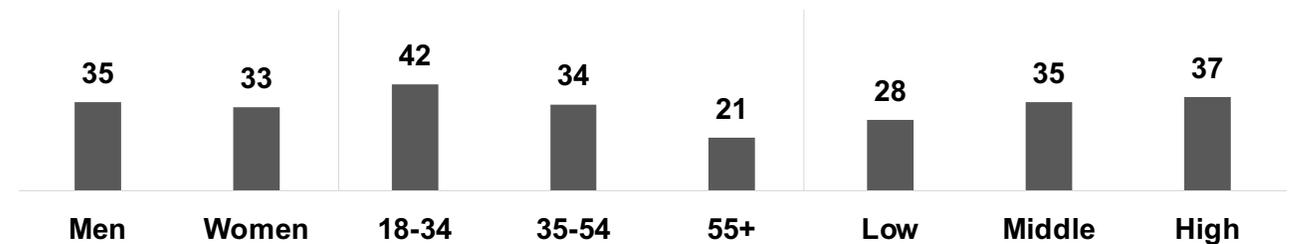
Markets



Global 7

34%

Gender | Age | Income

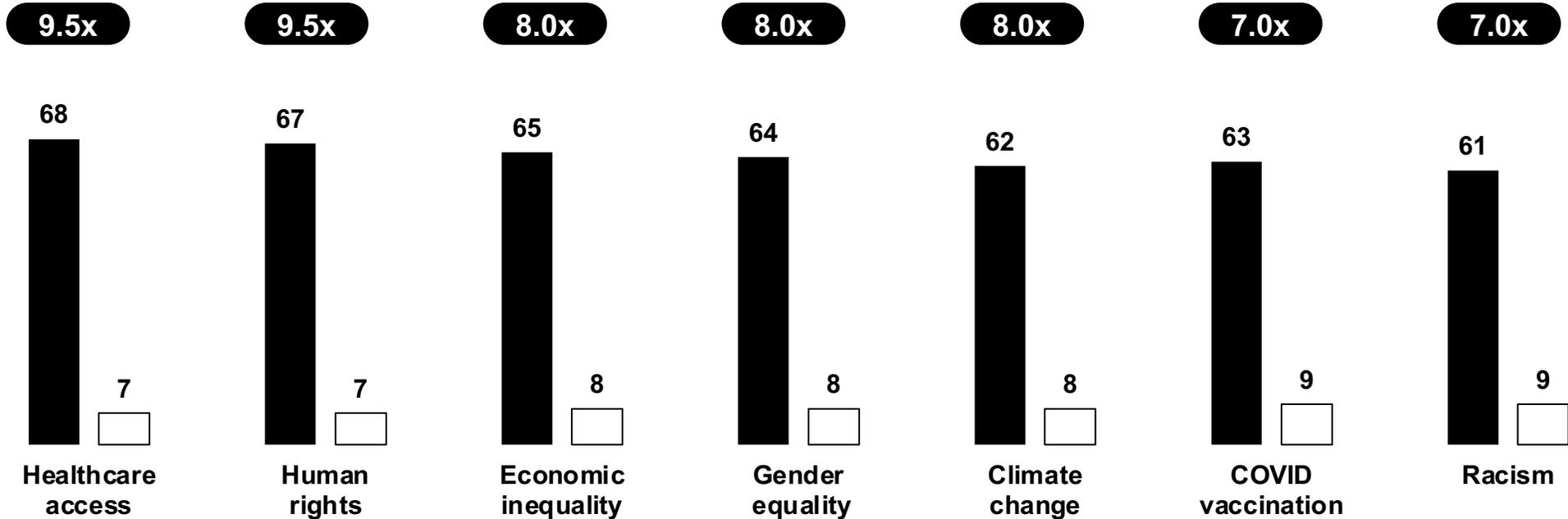


FOR EMPLOYERS THAT TAKE A STAND, REWARDS OUTWEIGH THE RISKS

Percent who would be **more or less likely to work** for an organization that publicly supports and demonstrates a commitment to each issue



Multiplier
More likely vs. less likely to work for an organization that takes a stand on each issue



2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_RISK. If a company/organization were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of working for that company/organization? 5-point scale; bottom 2 box, less likely; top 2 box, more likely. Question asked of half of the sample. 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

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THE POWER OF BELIEF-DRIVEN EMPLOYEES

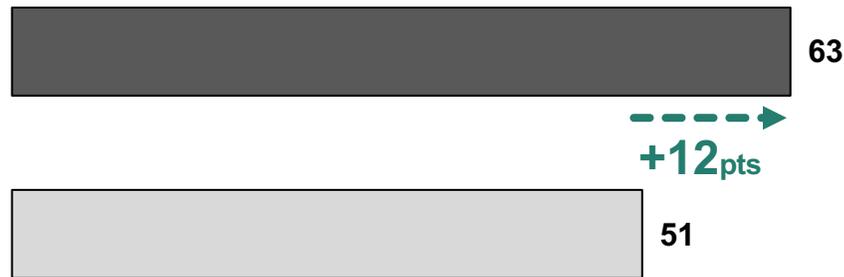
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BELIEF-DRIVEN EMPLOYEES MORE LIKELY TO ENGAGE IN ACTIVISM

To produce change in their organization,
percent who will ...

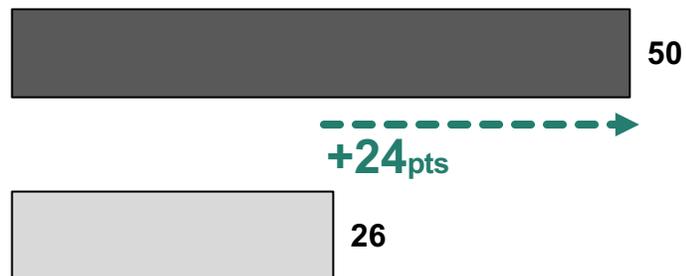
Work within the system

*Petition senior management to make changes
Suggest changes to direct manager or HR
Send internal comms to senior management*

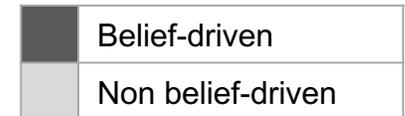


Take it public

*Whistleblowing
Go on strike or work slow-down
Leak internal documents or emails
Social media campaign
Protest outside our offices or factories*



Belief-driven employees:
*choose, leave, avoid or
consider employers based
on their values and beliefs*

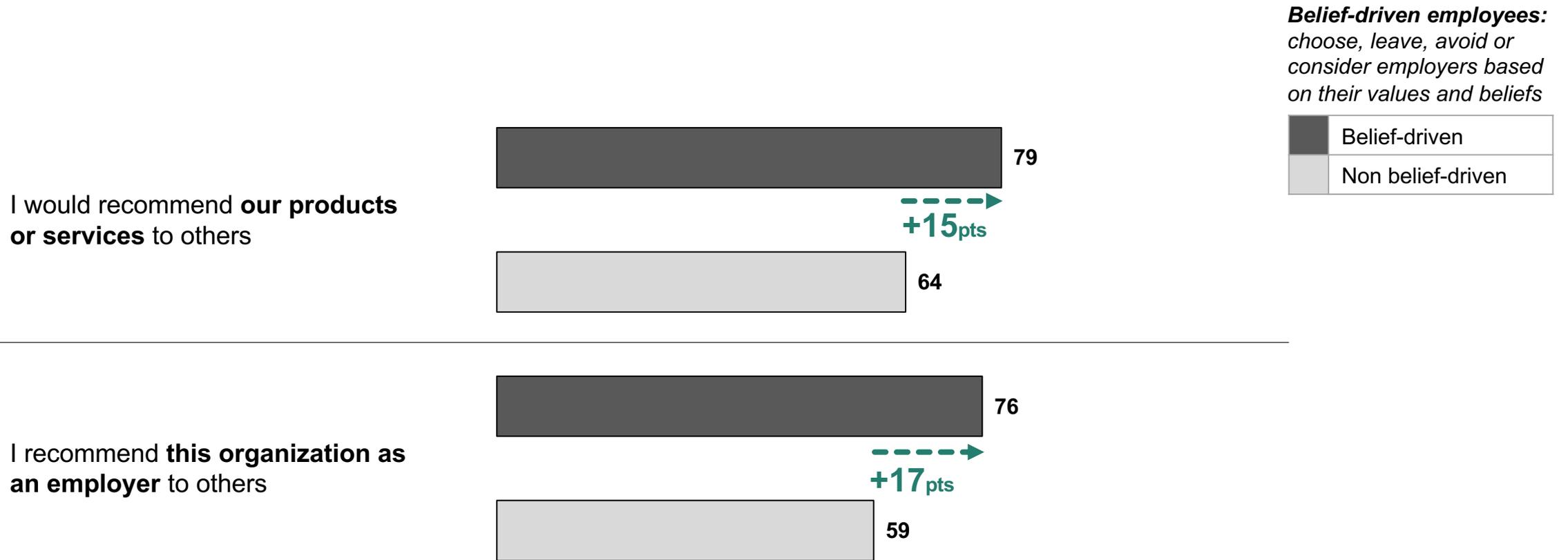


Belief-driven employees are
18pts more likely to engage
in workplace activism:



BELIEF-DRIVEN EMPLOYEES MORE LIKELY TO ADVOCATE

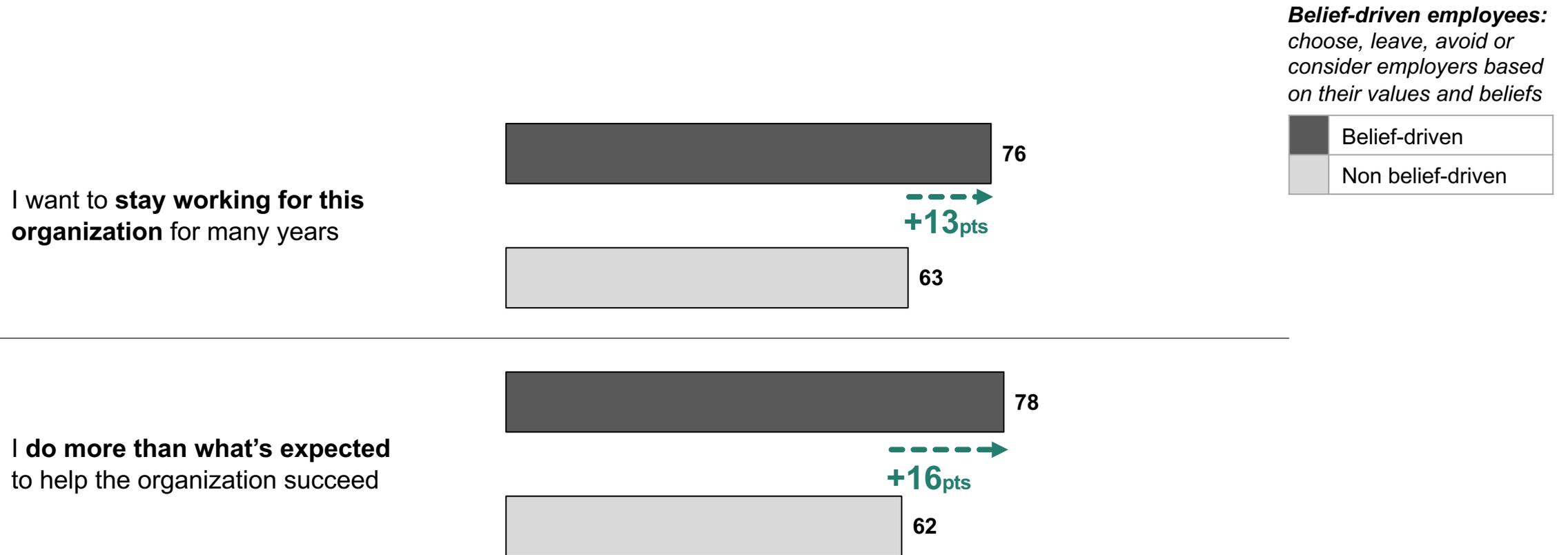
Percent who agree



2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements. 9-point scale; top 4 box, agree. Question asked of those who are an employee (Q43/1). 7-mkt avg., by belief-driven employee segments. All data is filtered to be among employees who work for an organization or corporation (Q43/1). See Technical Appendix for a full explanation of how belief-driven employees were measured.

BELIEF-DRIVEN EMPLOYEES MORE LOYAL AND COMMITTED

Percent who agree



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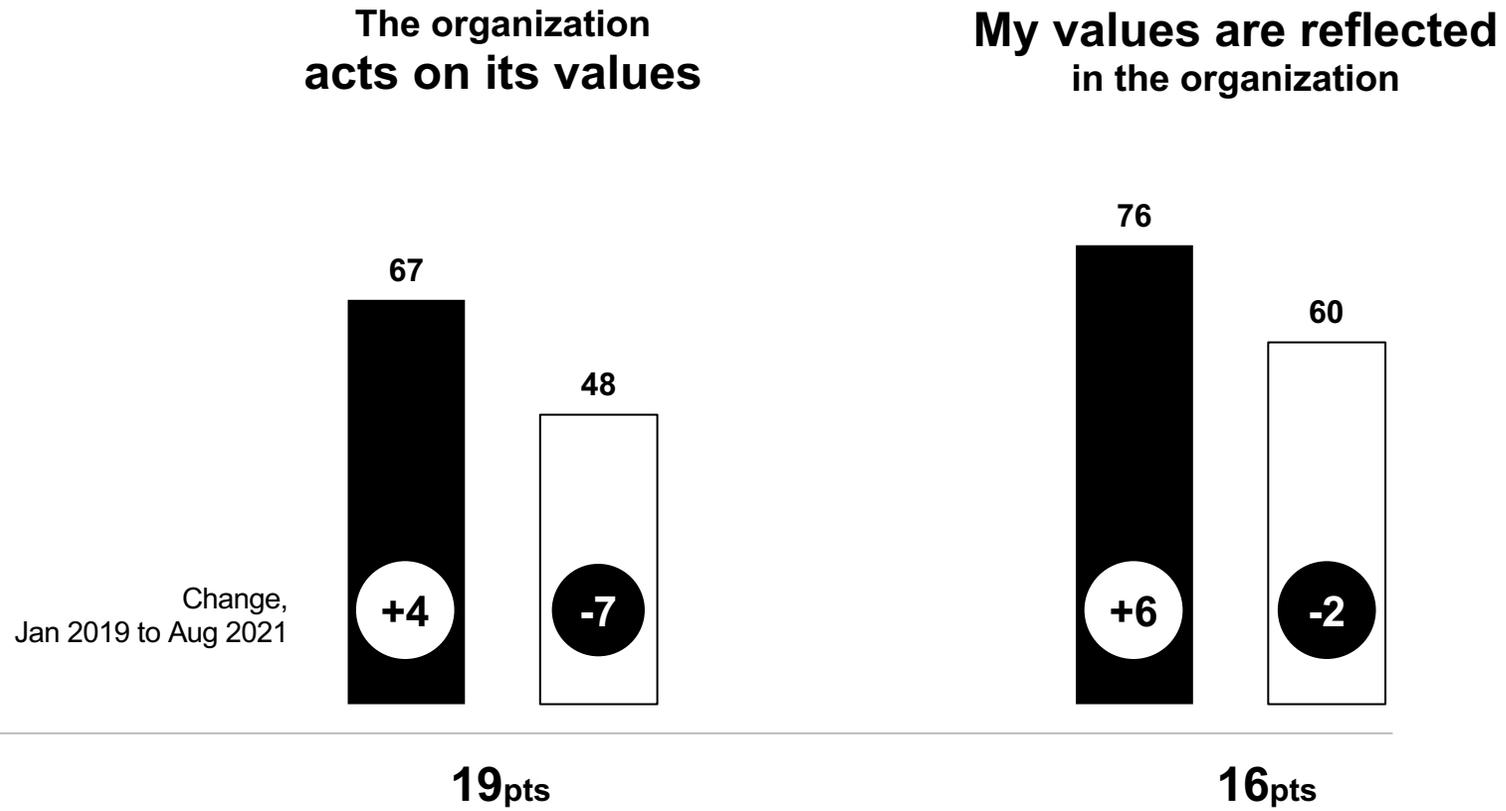
**BUILD EMPLOYER TRUST
THROUGH SHARED IMPACT**

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MIND THE GAP: WALK THE TALK ON VALUES

Percent who say each is a strong expectation or a deal breaker when considering a job, and percent who agree their employer is performing well on each

■ — □
Expectation Performance

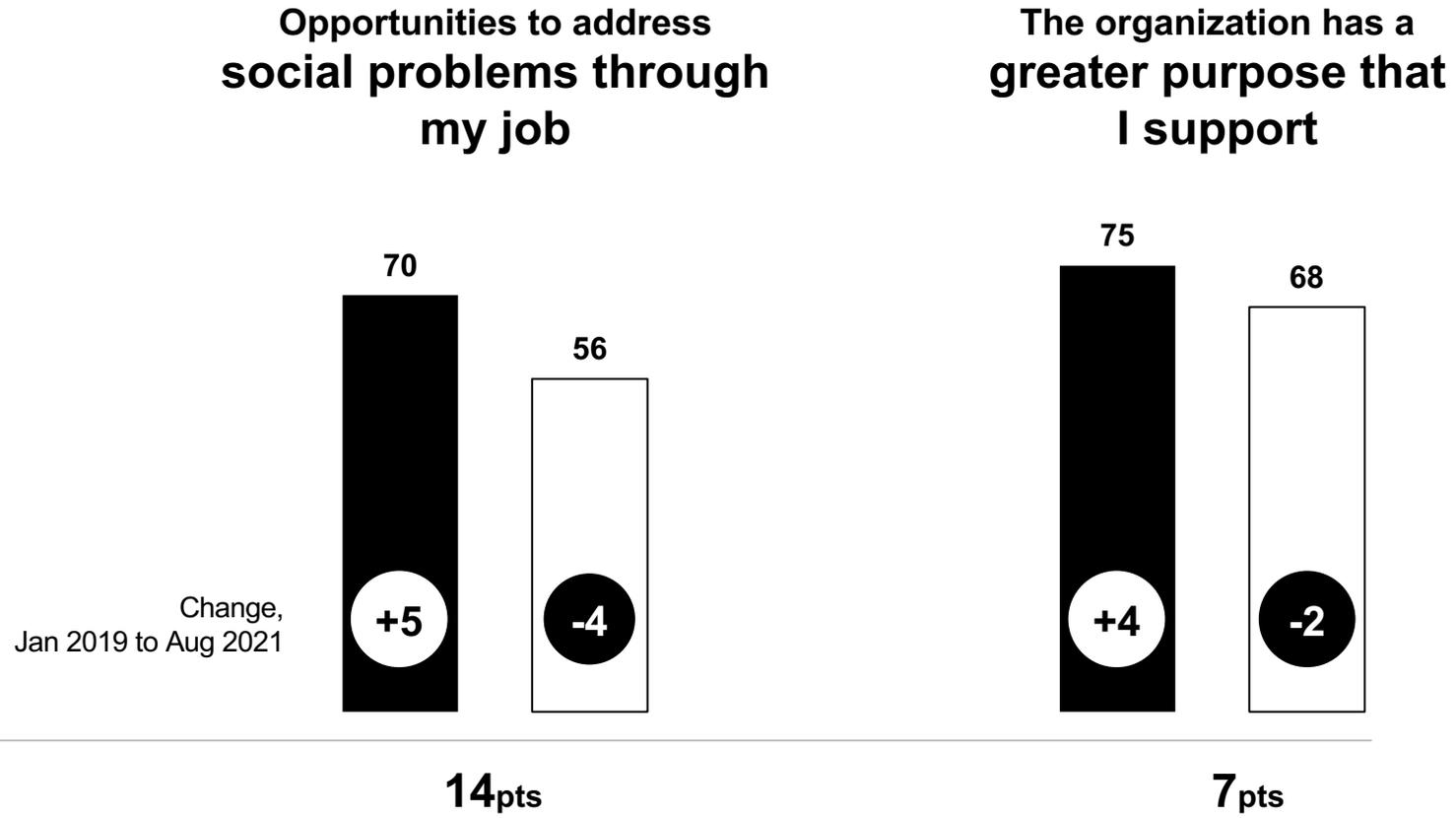


2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item using the scale below. 3-point scale; top 2 box, important. EMP_VAL. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee (Q43/1). 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

ENABLE THEM TO HAVE SOCIAL IMPACT

Percent who say each is a strong expectation or a deal breaker when considering a job, and percent who agree their employer is performing well on each

■ — □
Expectation Performance



Performance gap,
expectation vs. performance

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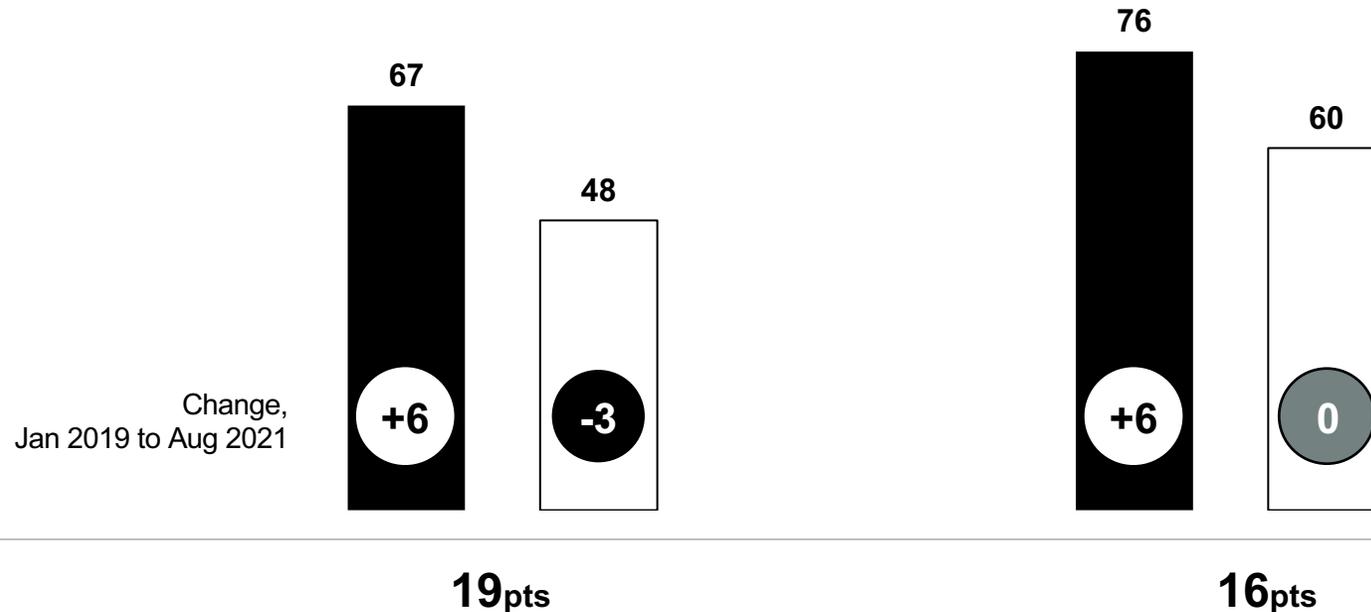
SHARE THE POWER

Percent who say each is a strong expectation or a deal breaker when considering a job, and percent who agree their employer is performing well on each

■ — □
Expectation Performance

If employees objected, the organization would stop certain business practices

The organization includes employees in the planning and strategy development process



Performance gap, expectation vs. performance

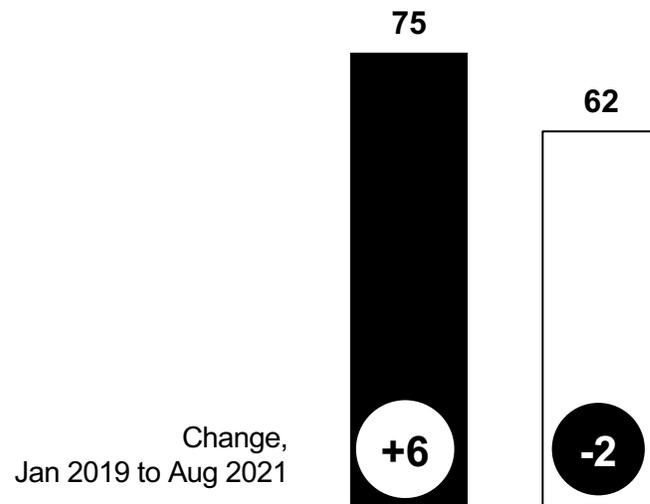
2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item using the scale below. 3-point scale; top 2 box, important. EMP_VAL. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee (Q43/1). 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

ACCELERATE COMMITMENTS TO DEI

Percent who say this is a strong expectation or a deal breaker when considering a job, and percent who agree their employer is performing well

■ Expectation □ Performance

Employees at all levels within the organization reflect the diversity of the customers and community we serve



	Expectation		Performance		Gap
Japan	59	+6	35	0	24
Brazil	78	+5	59	-7	19
U.S.	78	+5	65	-5	13
Germany	68	+10	57	+3	11
UK	72	+3	61	0	11
India	88	+10	81	+1	7
China	82	+8	79	+6	3

Performance gap,
expectation vs. performance

13pts

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ACCELERATE COMMITMENTS TO SUSTAINABILITY AND GOVERNANCE

Environment

The organization being highly socially responsible and **conscientious about its environmental impact** would compel me to **take a job offer there**

62%

Reliable employment

It is important to me that an organization **offers training programs to help keep my skills up to date**

81%

Governance

I'm looking to leave/have left my current job because I seek an **organization with better leadership**

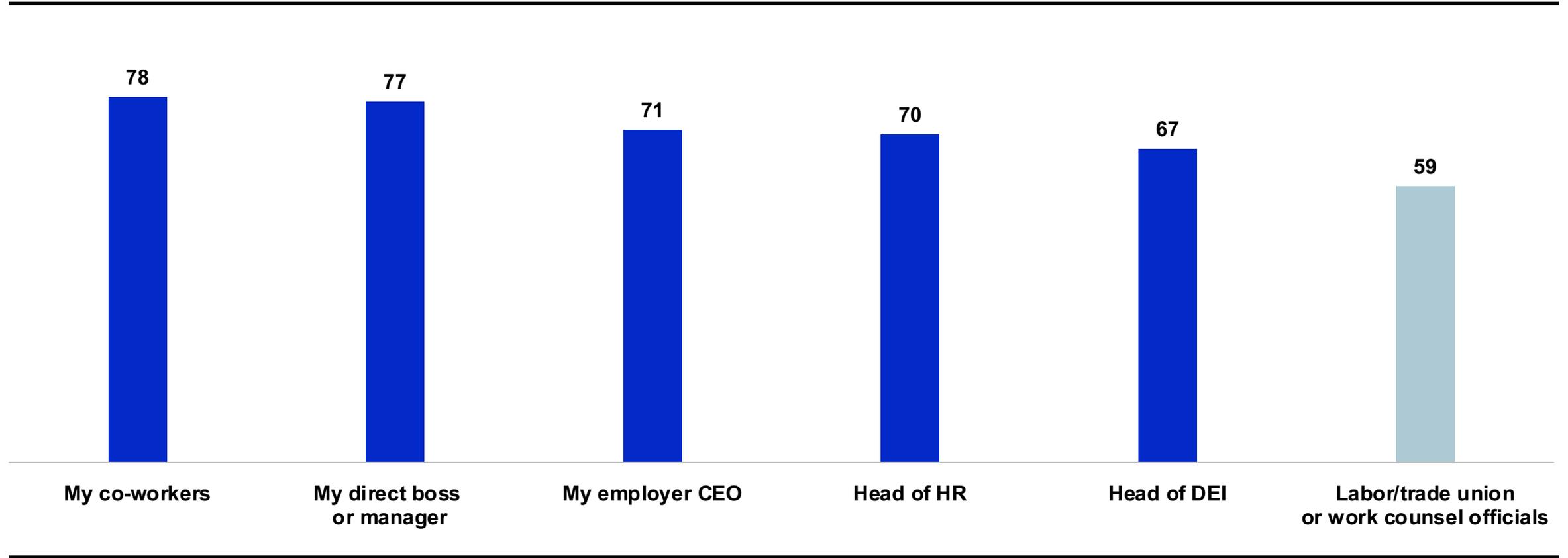
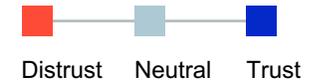
Want a more financially stable organization
Want better, more competent leadership
The organization handled a transition poorly

32% (net)

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. BIG_SELL. Jobs can come with many enticements to get you to go sign on with a particular organization over another. Using the scale below, rate each of the following enticements in terms of how compelling each would be in getting you to take a job offer with one organization over another which could not offer that same thing. 5-point scale, top 2 box, compelling. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item using the scale below. 3-point scale; top 2 box, important. ATT_WHY. Which of the following best describe the specific reasons why you have left, or are looking to leave, your current job? Pick up to three. Question asked among those who have or plan to alter their current employment situation (JOB_ATT/2-4;6). 7-mkt avg. "Governance" is a net of attributes 12-14. 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

LEVERAGE THE POWER OF TRUSTED VOICES

Percent trust, among employees



2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. TRU_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. All attributes asked among those who are employed (Q43/1) except "Labor/trade union or work counsel officials". All data is filtered to be among employees who work for an organization or corporation (Q43/1).

CEOS MUST EMBODY EMPLOYER VALUES

Percent increase in likelihood of trusting one's employer, showing top 5 (logistical regression analysis)

<i>When employees feel ...</i>	Increased likelihood of trust
that the CEO's actions embody our organization's values	+6.11%
that they have a safe working environment	+4.92%
valued by their employer	+4.70%
management always tells employees the truth	+4.64%
management communicates regularly with employees	+4.32%

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. Discrete choice analysis; results shown are marginal effects on likelihood to trust. EMP_VAL. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee (Q43/1). TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. "Your employer" asked among those who are employed (Q43/1). 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1). For a full explanation of how this data was calculated, please see the Technical Appendix.

CEOS FACE PRESSURE TO TAKE A STAND FROM CONSUMERS, INVESTORS AND EMPLOYEES

Belief-driven consumers

Percent who choose, switch, avoid or boycott a **brand** based on its stand on societal issues

64%

Source: 2021 Edelman Trust Barometer Special Report: Trust, the New Brand Equity

Belief-driven employees

Percent who choose, leave, avoid or consider **employers** based on their values and beliefs

61%

Percent of U.S. investors who agree

Business leaders have an obligation to use their power and influence to advocate for positive change in society

92%

Source: 2020 Edelman Trust Barometer Special Report: Institutional Investors

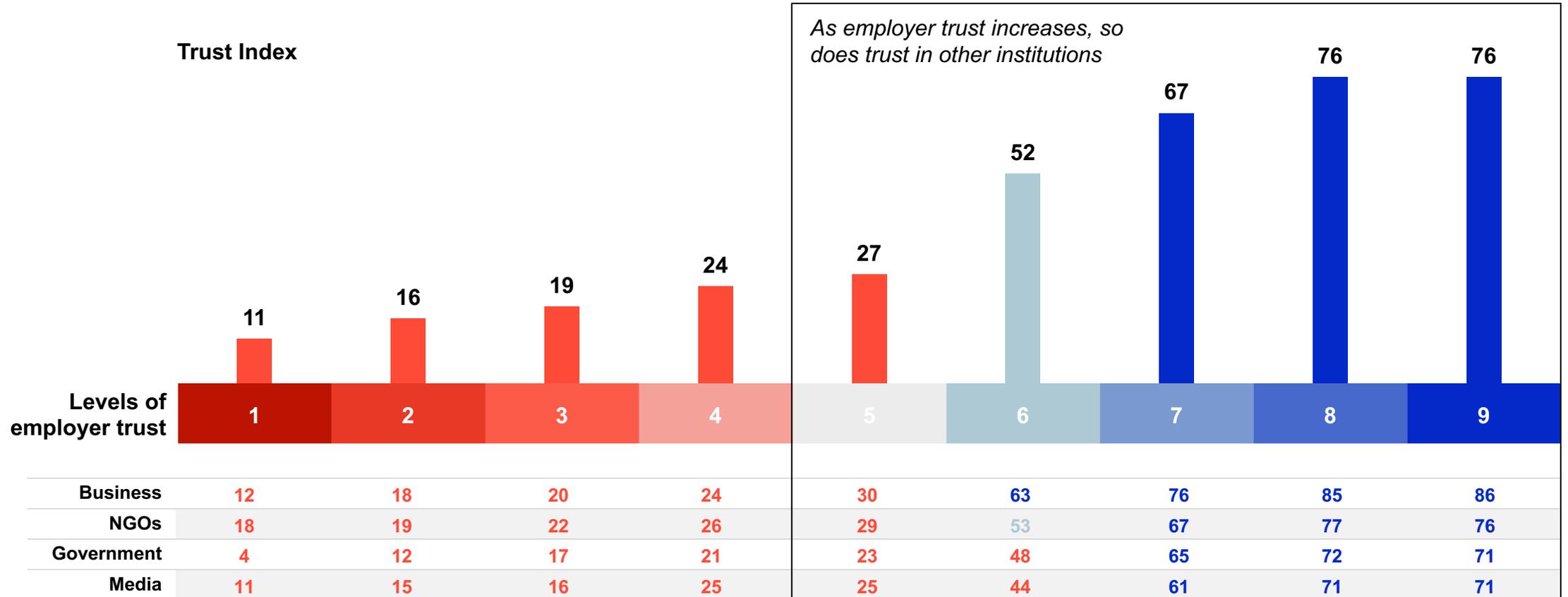
2021 Edelman Trust Barometer Special Report: Trust, The New Brand Equity. Belief-driven buyer segments. 14-mkt avg. See Technical Appendix for full explanation of how belief-driven buyers were measured.

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. Belief-driven employee segments. 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1). See Technical Appendix for a full explanation of how belief-driven employees were measured.

2020 Edelman Trust Barometer Special Report: Institutional Investors. US4. Please indicate the extent to which you agree or disagree with the following statements. Shown T2B. United States n=100

WHY IT MATTERS: CRITICAL ROLE FOR EMPLOYER TRUST IN A MULTI-STAKEHOLDER SOCIETY

Average trust across institutions (Trust Index) for each level of employer trust



2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. 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. "Your employer" asked among those who are employed (Q43/1). 7-mkt avg. Data is showing the top 4 box trust score (6-9) for each level of "employer" trust from 1 to 9. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

THE NEW EMPLOYER-EMPLOYEE COMPACT

1

Employees first

Consumers, investors and employees all agree that employees are now your most important—and influential—stakeholder. Meeting their expectations brings advocacy and loyalty. Employers who don't, risk disruptive activism and higher turnover.

2

Share the power

Employees know they now hold more power and want more participation. Practice bottom-up strategy planning to create more involvement.

3

Take a stand

Greater social impact is a strong expectation for the majority of job seekers. Center your business strategy and employer brand around your commitments on critical social issues such as healthcare, the environment and DEI.

4

Upskill your workforce

A broader societal remit doesn't relieve employers from the urgent need to train workers for the jobs of the future. Enabling workers to thrive in the age of automation and AI is a competitive advantage and builds employee trust.