2019 EDELMAN TRUST BAROMETER

Global Report

#TrustBarometer

Edelman trustbarometer 2019 | ANNUAL GLOBAL STUDY

Edelman

19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

All fieldwork was conducted between October 19 and November 16, 2018

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% (26,000+), half-sample global general online population +/- 0.8 (N=15,525).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N=min 200, varies by market, China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N =min 739, varies by market).

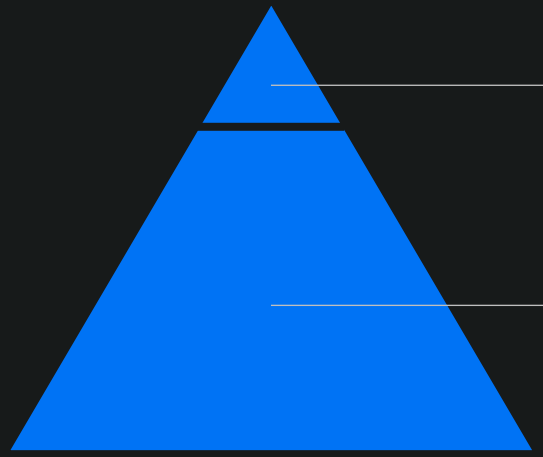
Employee MOE: 27-market = +/- 0.8% (N=16,944)
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

General Online Population

1,150 respondents per market

Ages 18+

All slides show general online population data unless otherwise noted



Informed Public

500 respondents in U.S. and China; 200 in all other markets

Represents 16% of total global population

Must meet 4 criteria

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

Mass Population

All population not including informed public

Represents 84% of total global population

2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed)

Oversample of employees of multinational companies: 500 respondents per market

TRUST IN RETROSPECT

2001
Rising Influence of NGOs

2002
Fall of the Celebrity CEO

2003
Earned Media More Credible Than Advertising

2004
U.S. Companies in Europe Suffer Trust Discount

2005
Trust Shifts from "Authorities" to Peers

2006
A "Person Like Me" Emerges as Credible Spokesperson

2007
Business More Trusted Than Government and Media

2008
Young Influencers Have More Trust in Business

2009
Business Must Partner with Government to Regain Trust

2010
Trust is Now an Essential Line of Business

2011
Rise of Authority Figures

2012
Fall of Government

2013
Crisis of Leadership

2014
Business to Lead the Debate for Change

2015
Trust is Essential to Innovation

2016
Growing Inequality of Trust

2017
Trust in Crisis

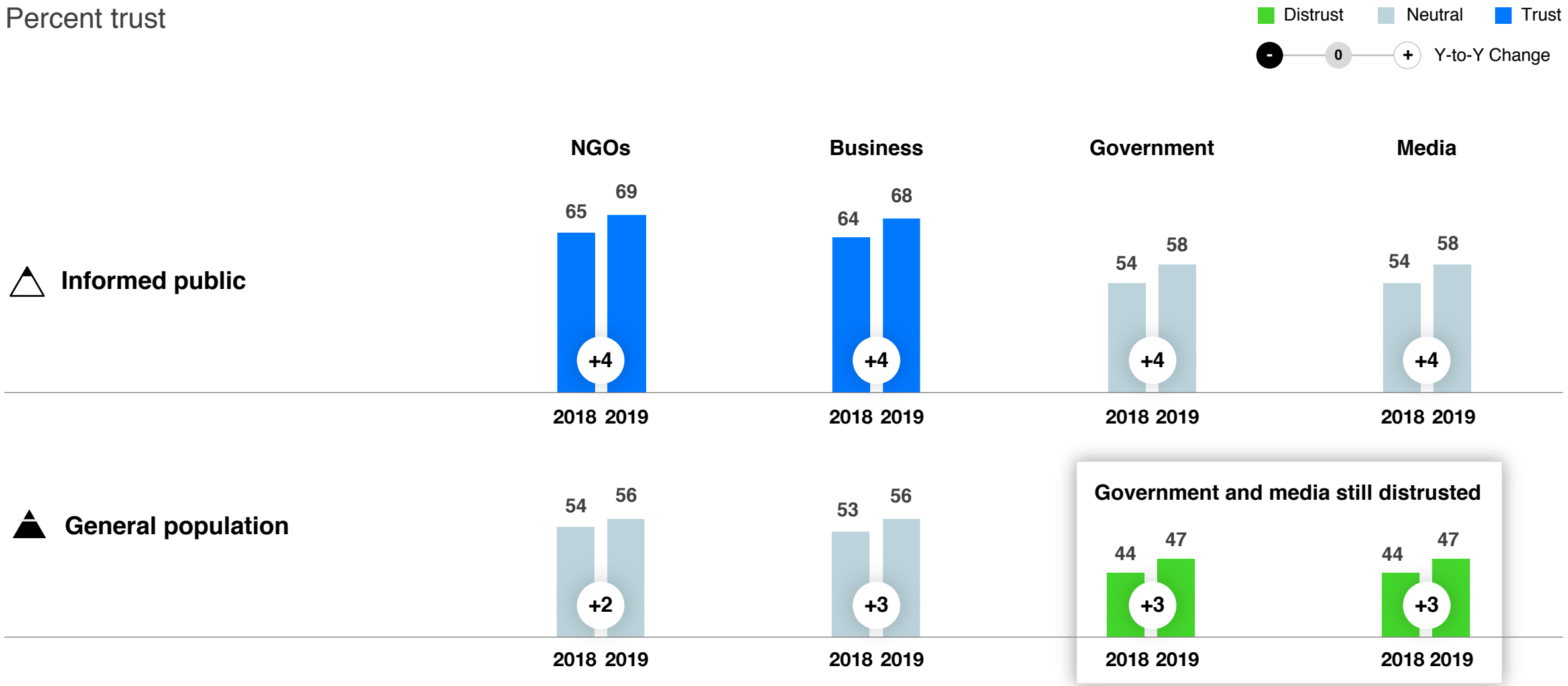
2018
The Battle for Truth

2019
Trust at Work

Divided by Trust

A MODEST RISE IN TRUST

Percent trust



2019 Edelman Trust Barometer. 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 nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. Informed public and general population, 26-market average.

DISTRUST CONTINUES

Trust Index

Global Trust Index increases 3 pts to neutral

15 of 26 markets are distrusters, down 3 from 2018

2019 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 using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

2018 General Population	
49	**Global 26**
74	China
71	Indonesia
68	India
66	UAE
58	Singapore
54	Mexico
54	The Netherlands
53	Malaysia
49	Canada
47	Argentina
47	Colombia
47	Spain
46	Turkey
45	Hong Kong
44	Brazil
44	S. Korea
43	Italy
43	U.S.
41	Germany
40	Australia
40	France
39	U.K.
38	Ireland
38	S. Africa
37	Japan
36	Russia

2019 General Population	
52	**Global 26**
79	China
73	Indonesia
72	India
71	UAE
62	Singapore
59	Malaysia
58	Mexico
56	Canada
55	Hong Kong
54	The Netherlands
52	Colombia
49	U.S.
48	Australia
46	Argentina
46	Brazil
46	Italy
46	S. Korea
45	S. Africa
45	Turkey
44	France
44	Germany
43	U.K.
42	Ireland
40	Spain
39	Japan
29	Russia

Trust (60-100)

Neutral (50-59)

Distrust (1-49)

Biggest changes in

Hong Kong	**+10**
Australia	**+8**
Canada	**+7**
S. Africa	**+7**
Russia	**-7**
Spain	**-7**

TRUST RISES FOR INFORMED PUBLIC

Trust Index

A 4-point increase in the global Trust Index

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2018 Informed Public	
59	**Global 26**
83	China
81	Indonesia
77	India
76	UAE
70	Singapore
67	The Netherlands
65	Malaysia
65	Mexico
62	Canada
60	Argentina
57	Italy
57	Turkey
56	France
55	Australia
55	Germany
55	Spain
52	U.K.
51	Brazil
50	Colombia
49	Hong Kong
49	S. Korea
48	Ireland
47	Russia
46	Japan
45	S. Africa
45	U.S.

2019 Informed Public	
63	**Global 26**
88	China
83	India
83	Indonesia
83	UAE
74	Canada
70	Malaysia
69	Singapore
68	Mexico
67	The Netherlands
66	Hong Kong
64	U.K.
61	S. Korea
60	Germany
60	U.S.
59	Australia
59	France
56	Colombia
53	Argentina
53	Italy
53	Japan
53	S. Africa
53	Turkey
51	Brazil
48	Ireland
47	Spain
35	Russia

Trust (60-100)

Neutral (50-59)

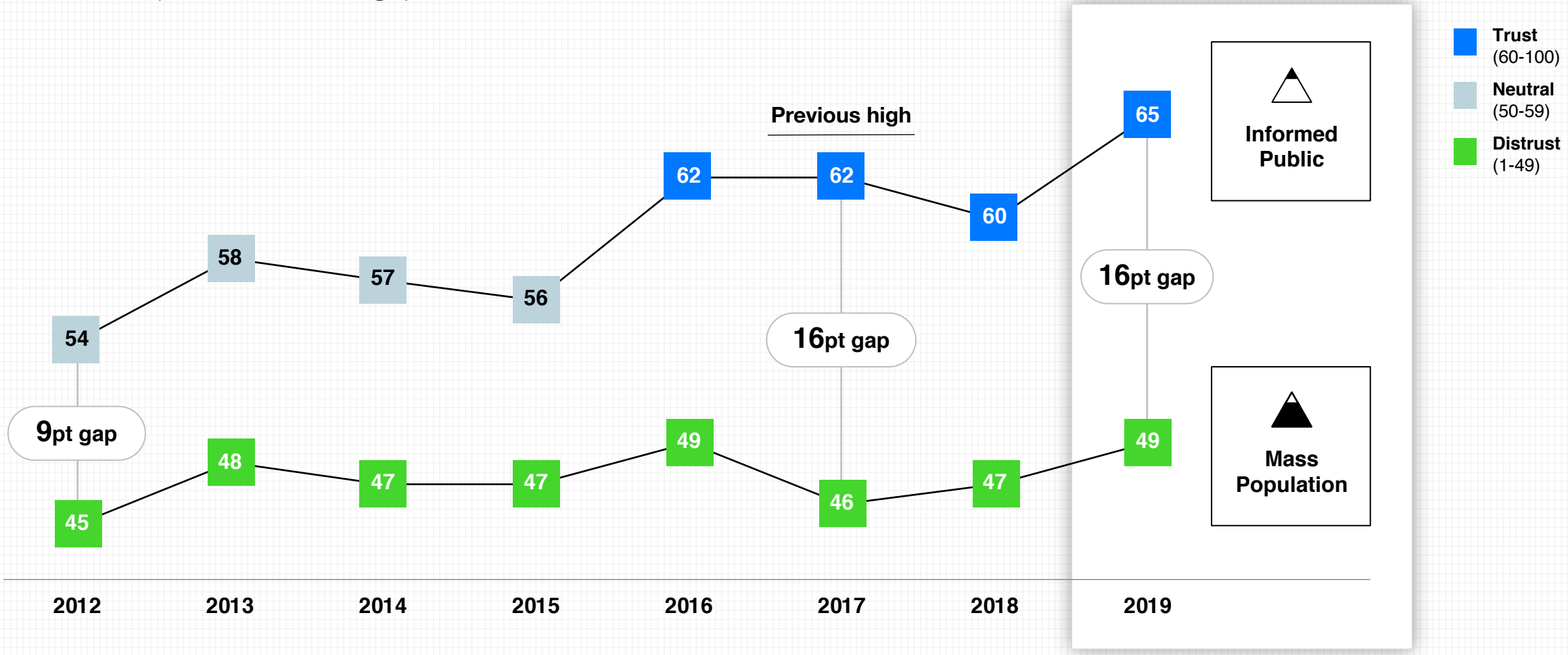
Distrust (1-49)

Biggest changes in

Hong Kong	**+17**
U.S.	**+15**
Canada	**+12**
U.K.	**+12**
Russia	**-12**

TRUST INEQUALITY RETURNS TO RECORD HIGHS

Trust Index (23-market average)



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A WORLD OUT OF BALANCE

Trust Index

Mass population 14 points less trusting

18 markets with double-digit trust gaps

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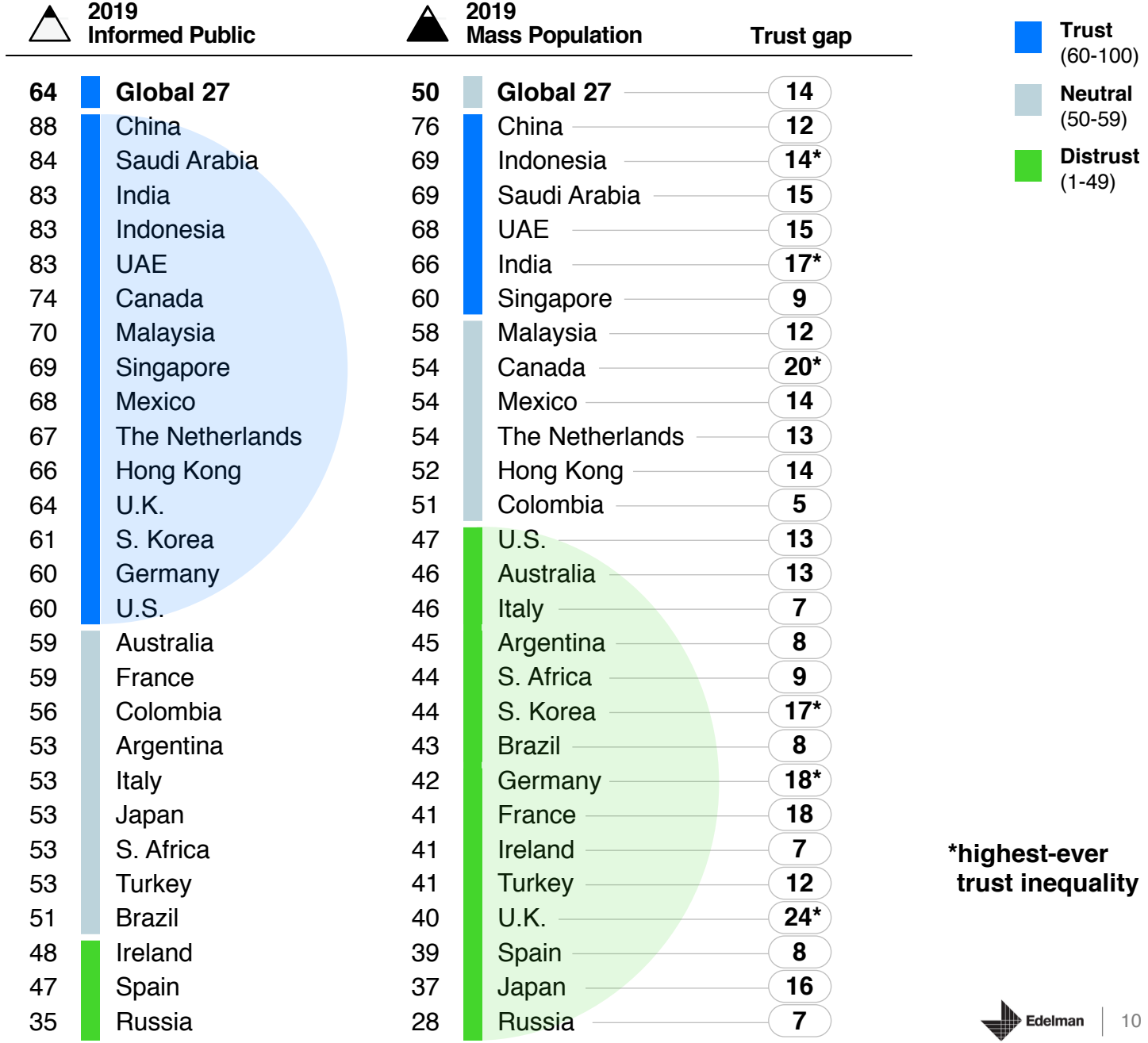
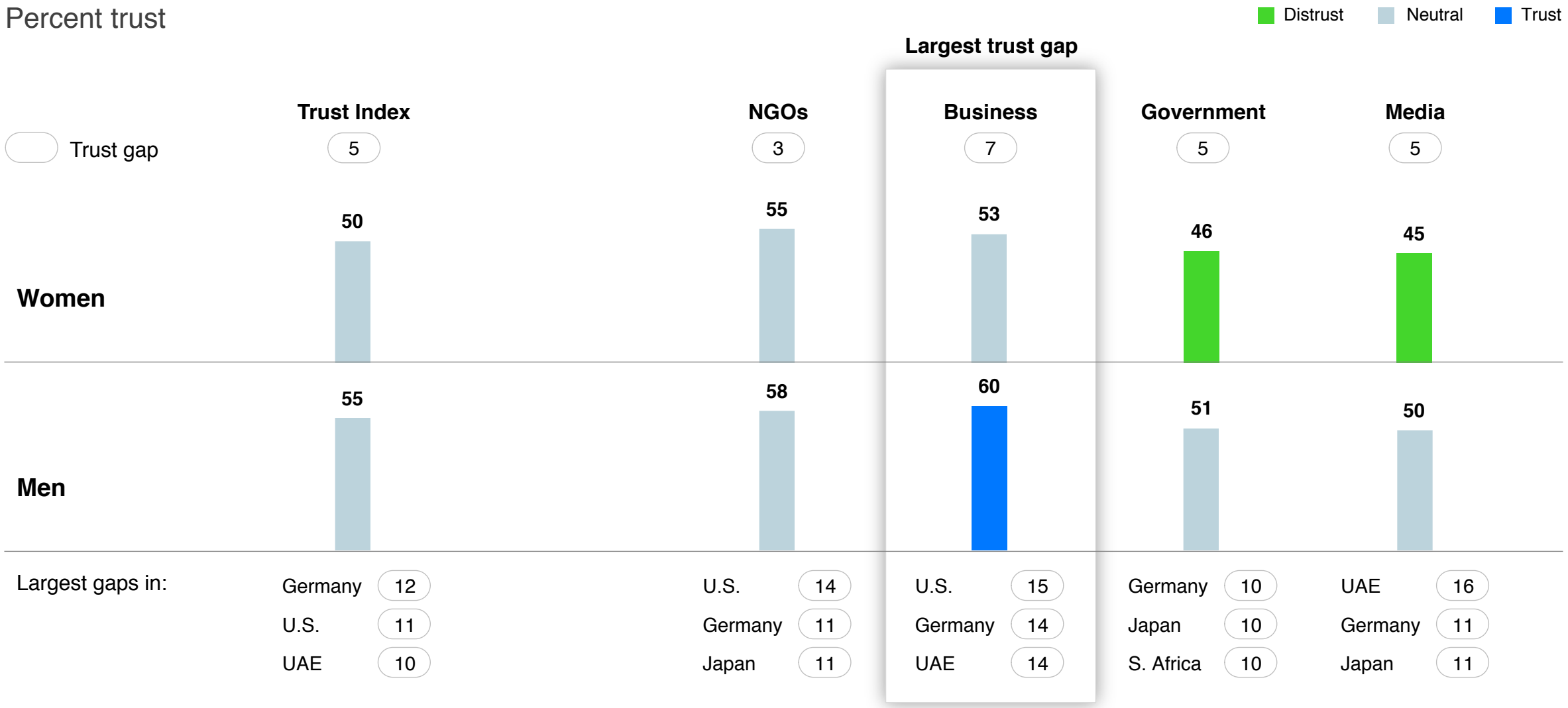


DIVIDED ALONG GENDER LINES

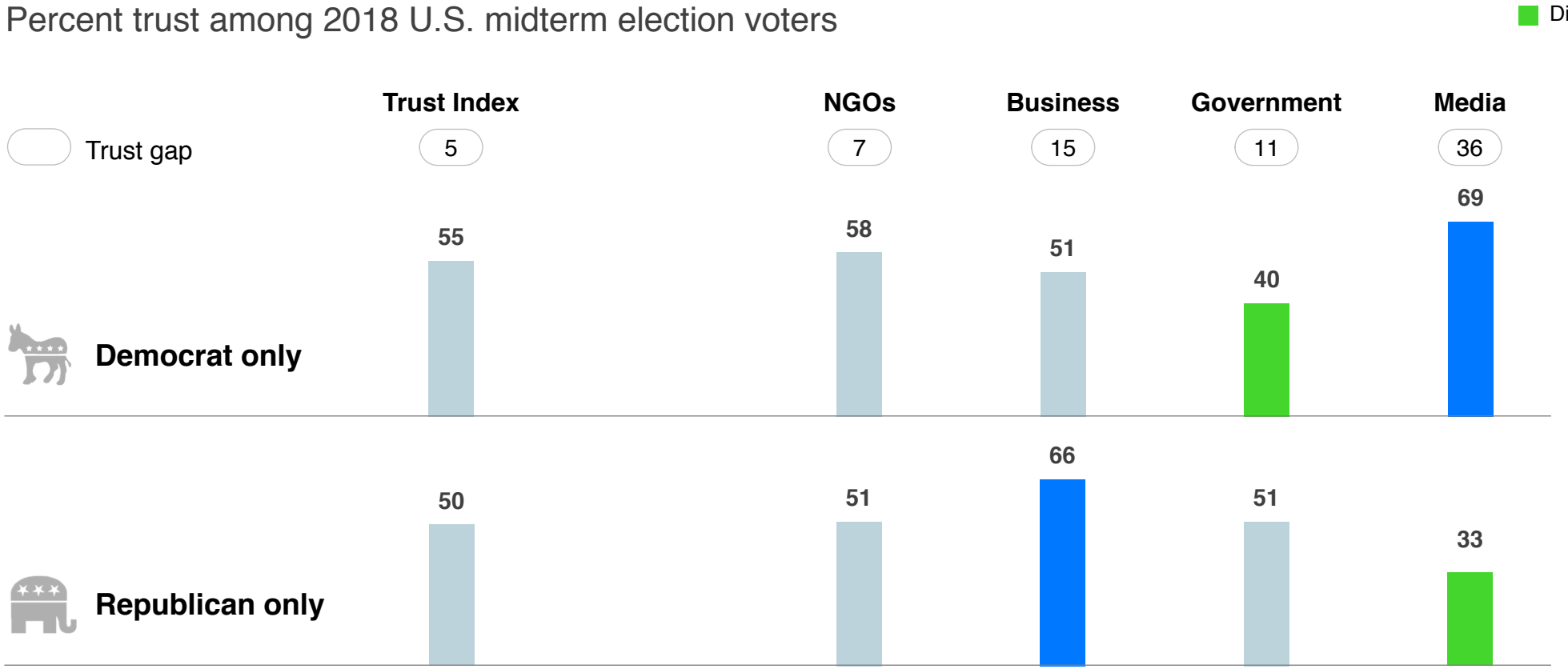
Percent trust



2019 Edelman Trust Barometer. 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 nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 27-market average, by gender.

CONTINUED POLITICAL DIVIDE IN THE U.S.

Percent trust among 2018 U.S. midterm election voters



Which political party did you vote for/ intend to vote for in November's congressional midterm election? (%)

37	Democrat only
25	Republican only
25	Mix
11	None

2019 Edelman Trust Barometer. 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 nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. Q39. Which political party do you intend to vote for or did you vote for in this November's congressional midterm elections? General population, U.S., among Democratic only voters (n=405) and Republican only voters (n=269).

An Urgent Desire for Change

FEARS OF JOB LOSS REMAIN HIGH

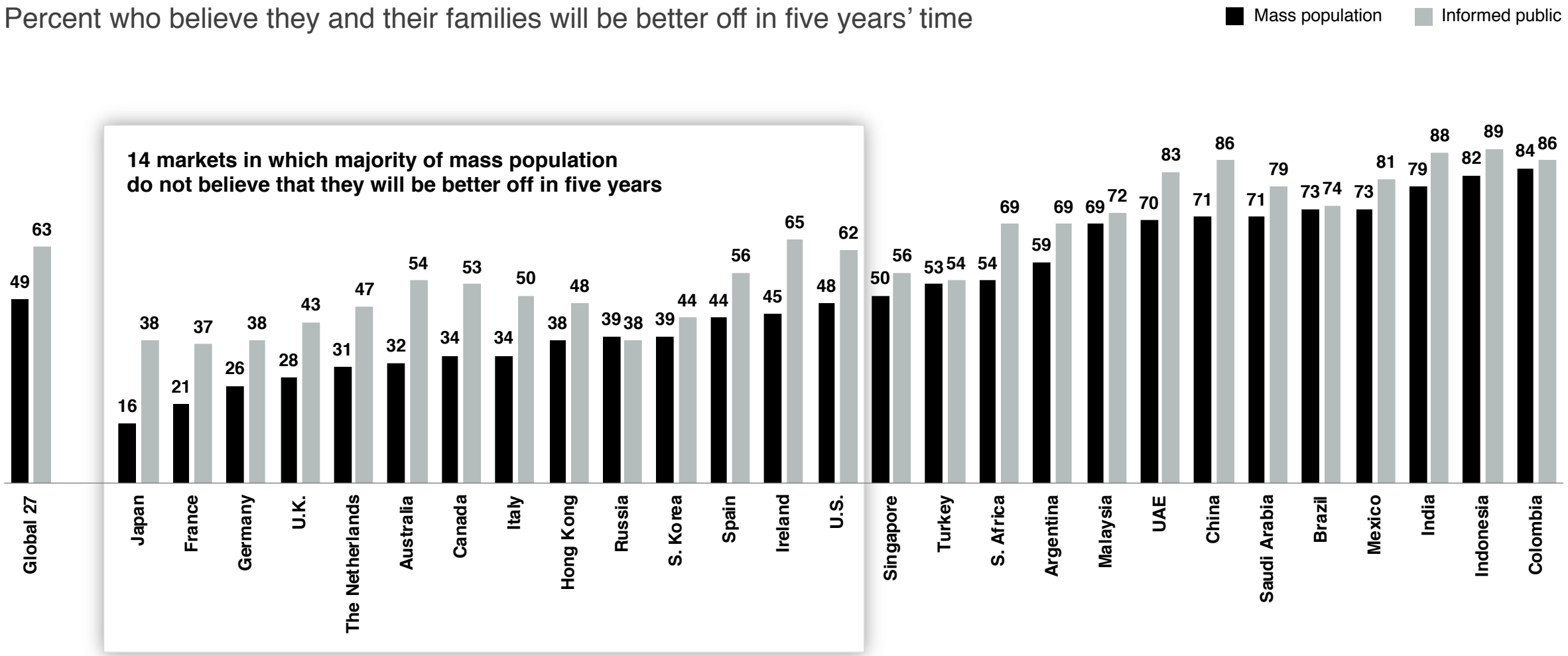
Percent of employees who worry about job loss due to each issue

	Not having the **training** and skills necessary to get a good paying job	**Automation** and/or other innovations taking your job away	International conflicts about **trade policies** and **tariffs** hurting the company you work for
All employees	**59%**	**55%**	**57%**
Multinational employees	**63%**	**60%**	**64%**

2019 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? Please indicate your answer using a nine-point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". 9-point scale; top 4 box, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, 27-market average.

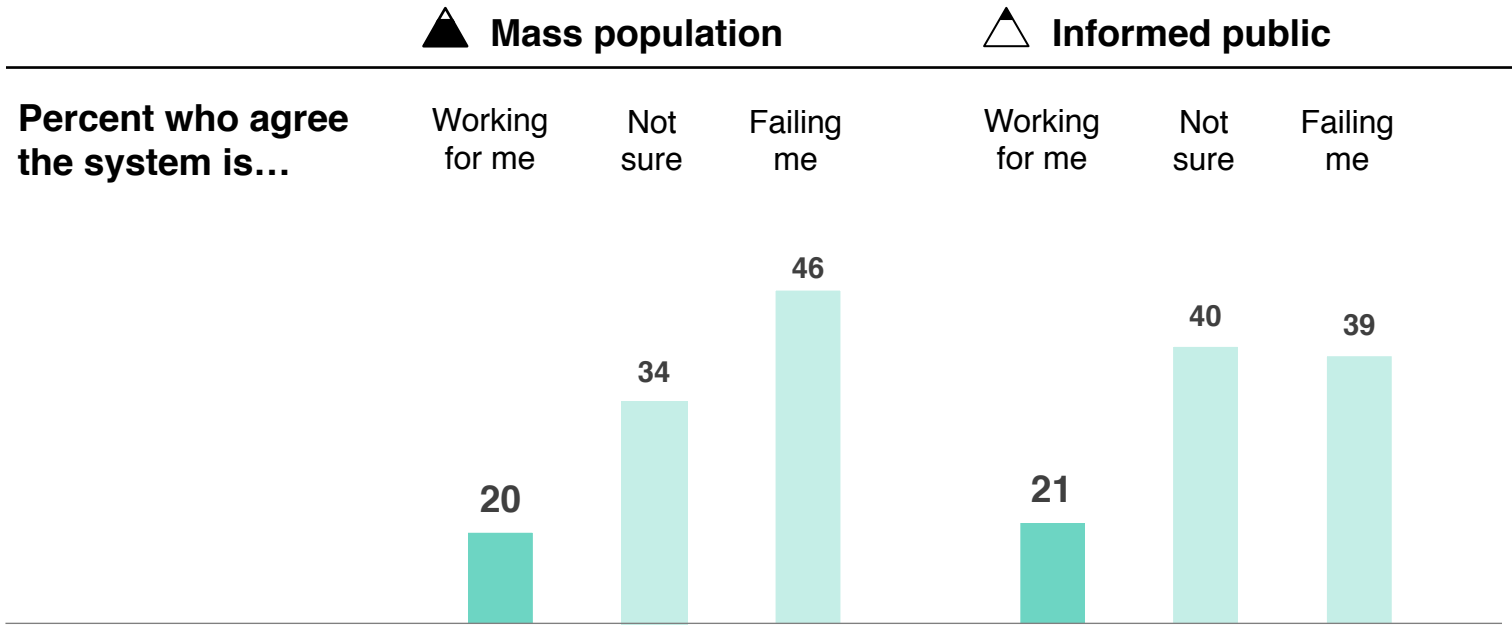
DEVELOPED WORLD PESSIMISTIC ABOUT FUTURE

Percent who believe they and their families will be better off in five years' time



2019 Edelman Trust Barometer. 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? 5-point scale; top 2 box, better off. Informed public and mass population, 27-market average.

ONLY 1 IN 5 BELIEVE THE SYSTEM IS WORKING FOR THEM



How true is this for you?	▲	△
Sense of injustice	**72**	**74**
Desire for change	**70**	**76**
Lack of confidence	**63**	**68**
Lack of hope	**24**	**17**

2019 Edelman Trust Barometer. "System failing" measure. For full details on how the "system failing" measure was calculated, please refer to the Technical Appendix. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. Informed public and mass population, 27-market average. Sense of injustice is an average of POP_MDC/1,2,3,8; Desire for change is POP_MDC/9; Lack of confidence is POP_MDC/10; Lack of hope is an average of POP_MDC/18,19,20 [reverse scored].

THEY'RE TAKING CHANGE INTO THEIR OWN HANDS

"Yellow Vests" demonstrate for economic justice

India's "Women's Wall" demonstrate for equality

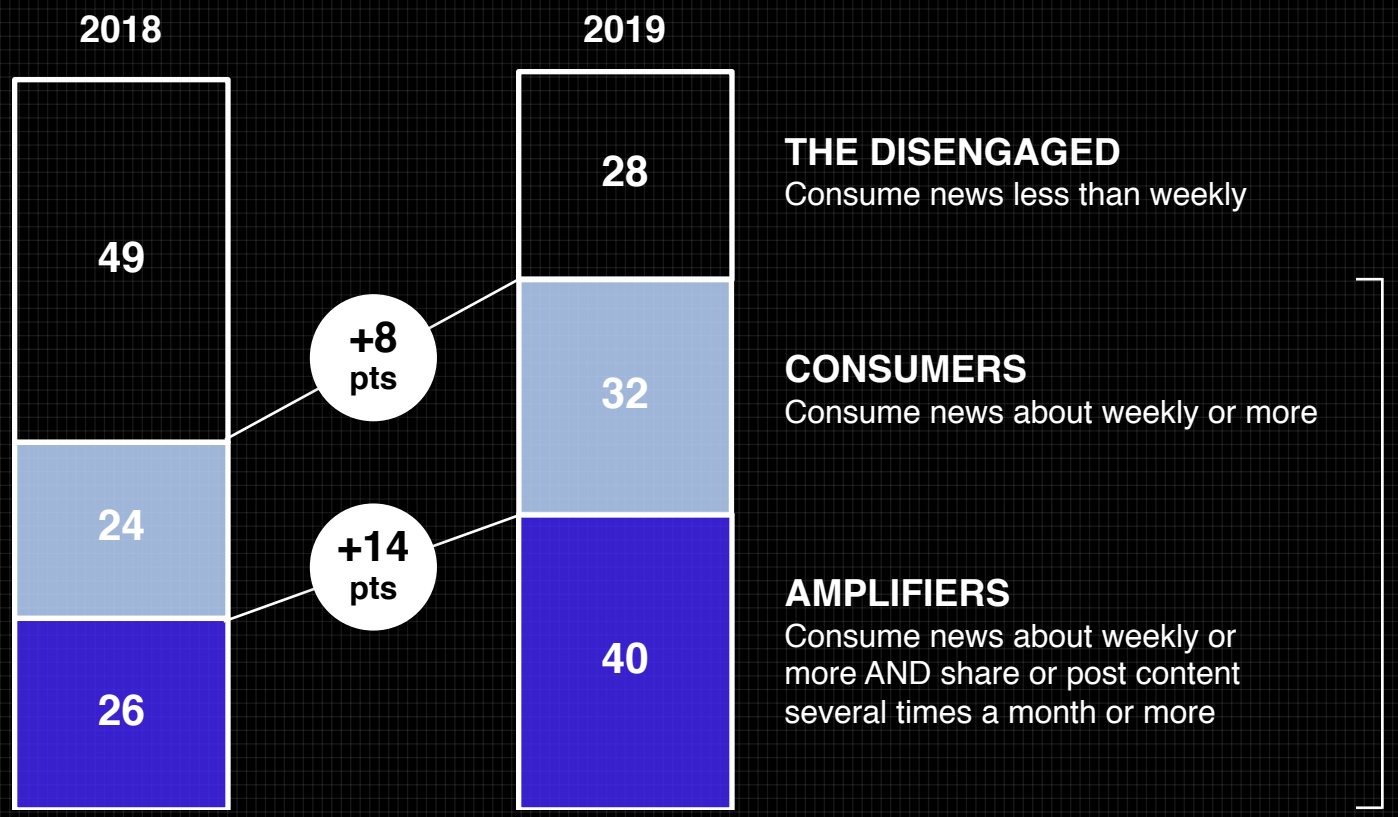
Protest against Salesforce's work with border agency

Making Change Happen

MASSIVE RISE IN NEWS ENGAGEMENT

How often do you engage in the following activities related to news and information?

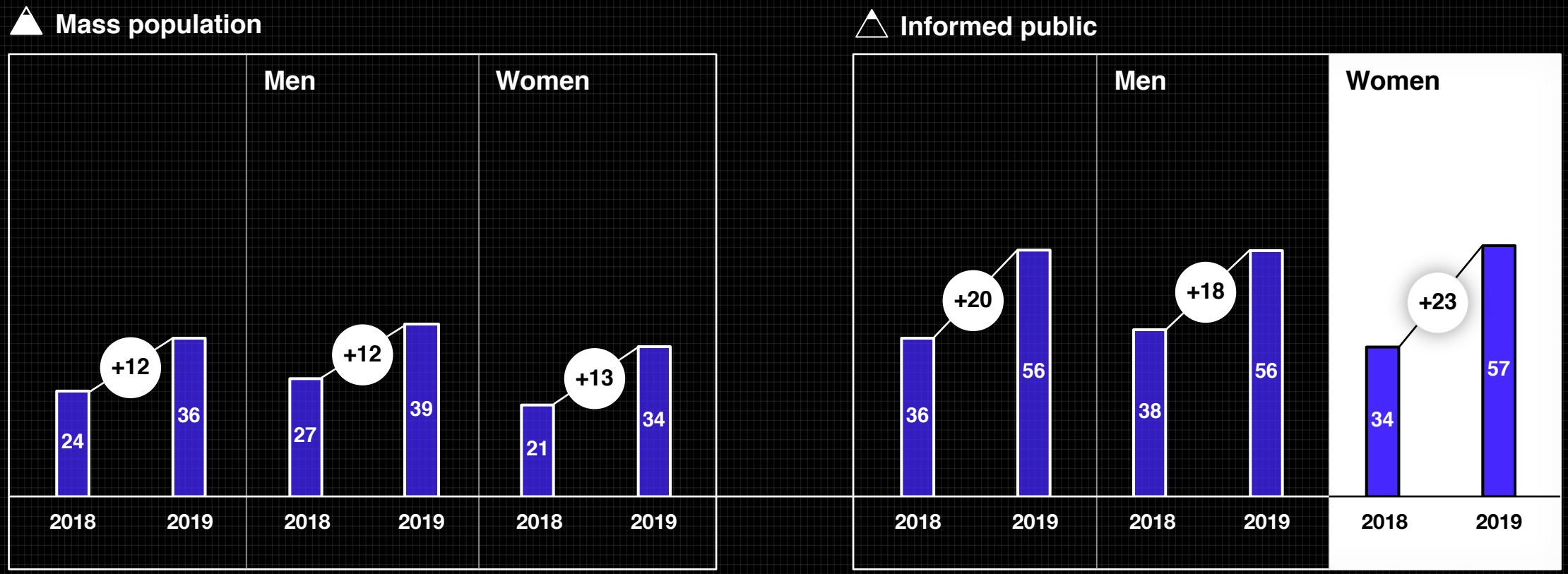
- 0 + Y-to-Y Change



2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. General population, 26-market average. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

MORE WOMEN THAN MEN BECOME AMPLIFIERS

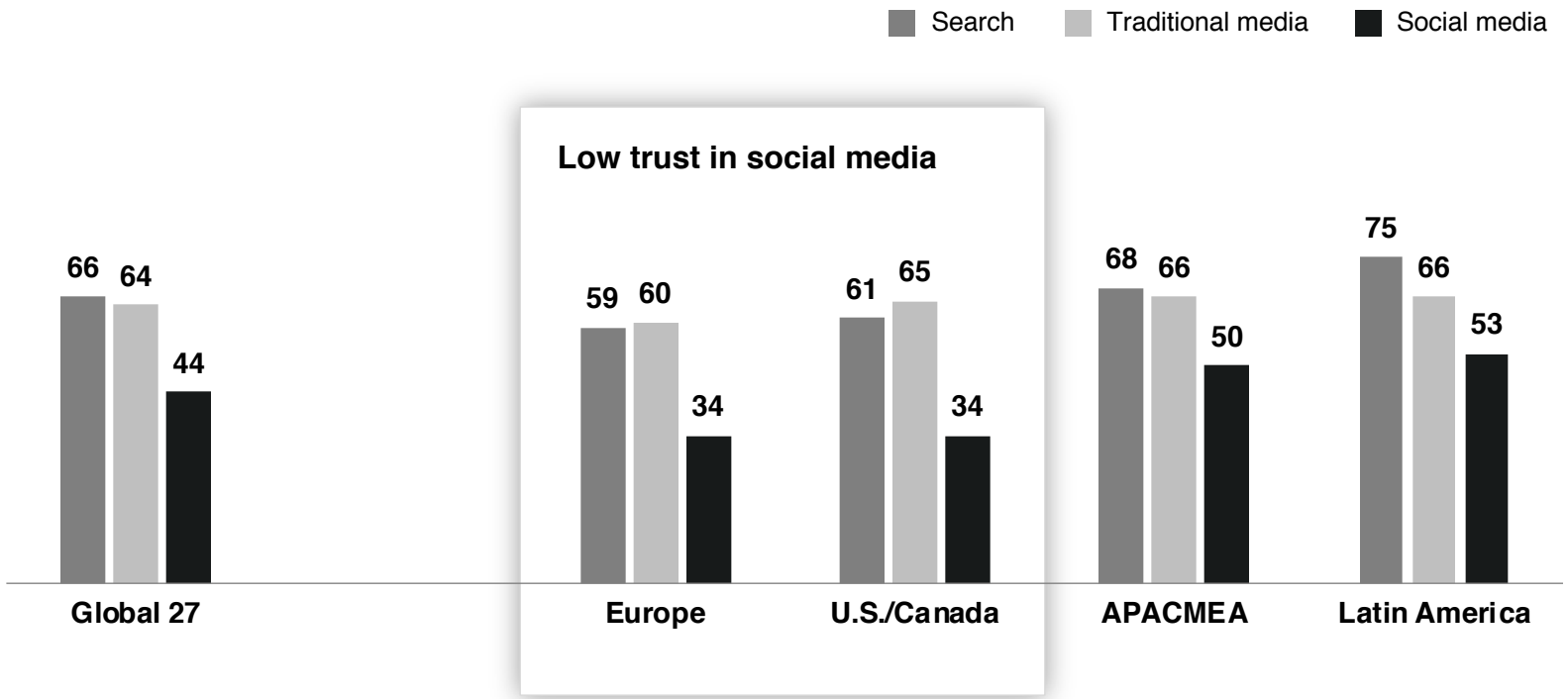
Percent of amplifiers in each segment



2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. Mass population and informed public, 26-market average, among amplifiers by gender. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

LOOKING FOR RELIABLE SOURCES

Percent who trust each source of news



73%

worry about false information or fake news being used as a weapon

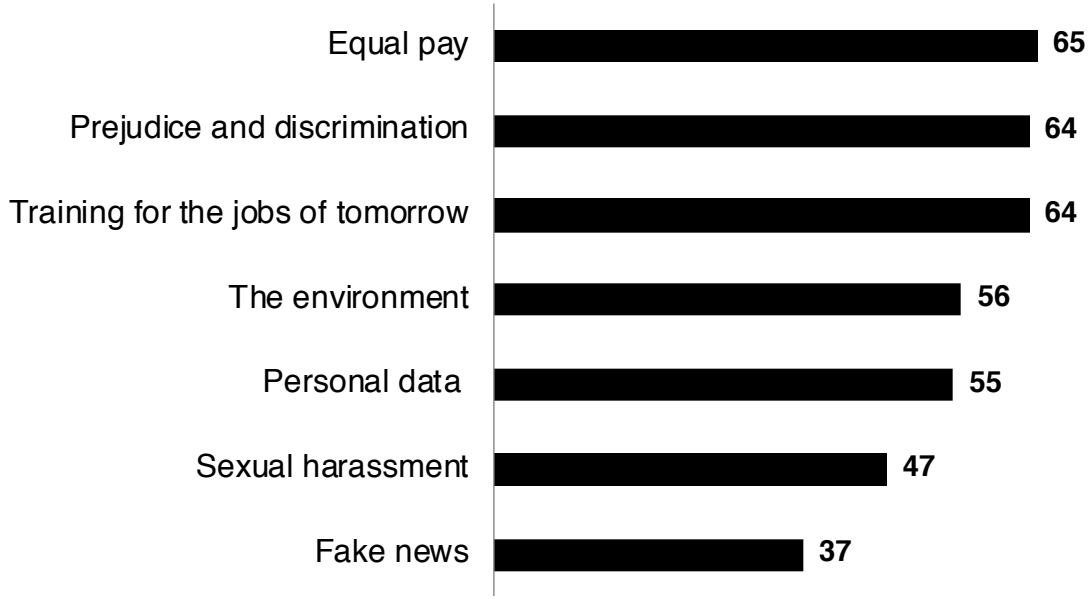
2019 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-market average. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal". 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 27-market average and by region.

LOOKING FOR LEADERSHIP FROM CEOS

Percent who say that CEOs should take the lead on change rather than waiting for government to impose it

76% **+11pts**

Percent who agree CEOs can create positive change in:



2019 Edelman Trust Barometer. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? 9-point scale; top 4 box, agree. Question asked of half of the sample. CEO_SIG. In which of the following areas do you think CEOs can have significant impact or create the most positive change? Question asked of half of the sample. General population, 25-market average (excluding the Netherlands and Saudi Arabia).

LOOKING FOR LEADERSHIP FROM MY EMPLOYER

71%

of employees agree
It's critically important for my CEO to respond to challenging times

- Industry issues
- Political events
- National crisis
- Employee-driven issues

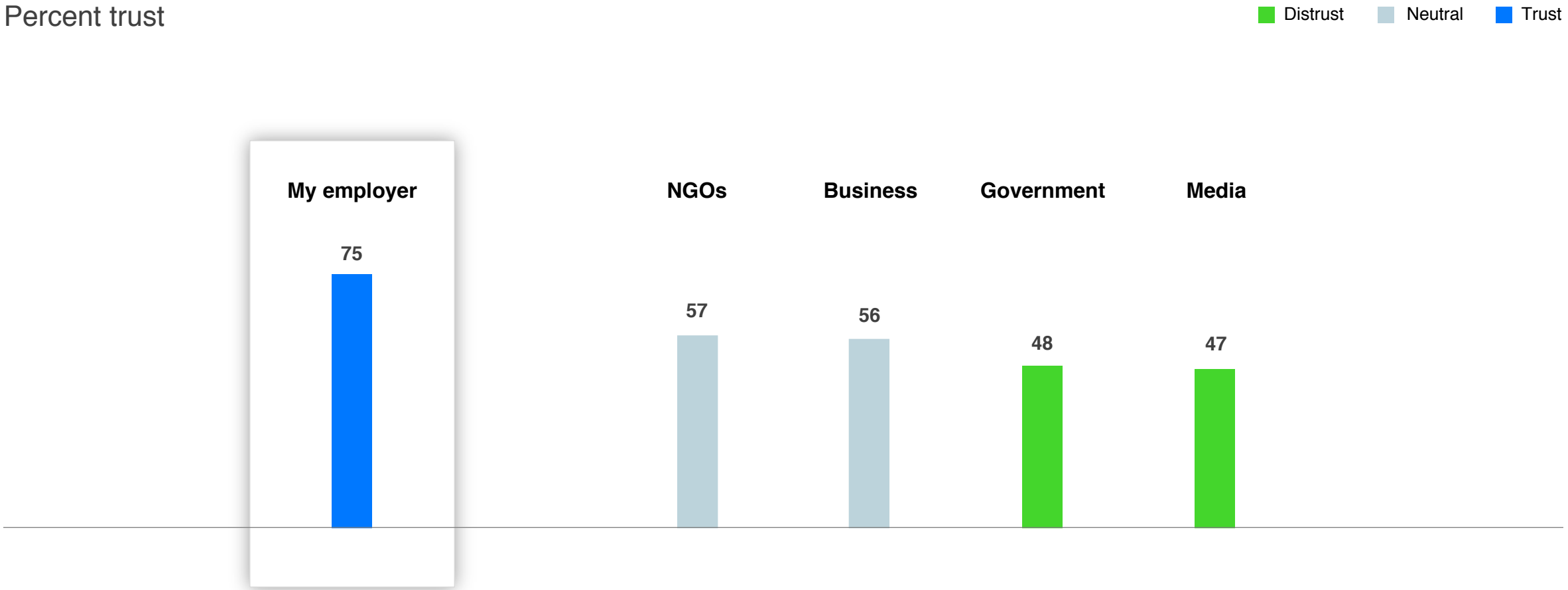
2019 Edelman Trust Barometer. CEO_DIR. On which of the following occasions do you believe it is critically important to hear directly from the CEO or head of the organization you work for? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average.

Data shown is a net of "when there is major news or an event that affects our industry or sector," "when there is a major social or political event that affects our country," "when there is a crisis in the country," and "when employees demand that the CEO publicly take a stand on an important issue".

My Employer: A Trusted Partner for Change

MY EMPLOYER MOST-TRUSTED RELATIONSHIP

Percent trust



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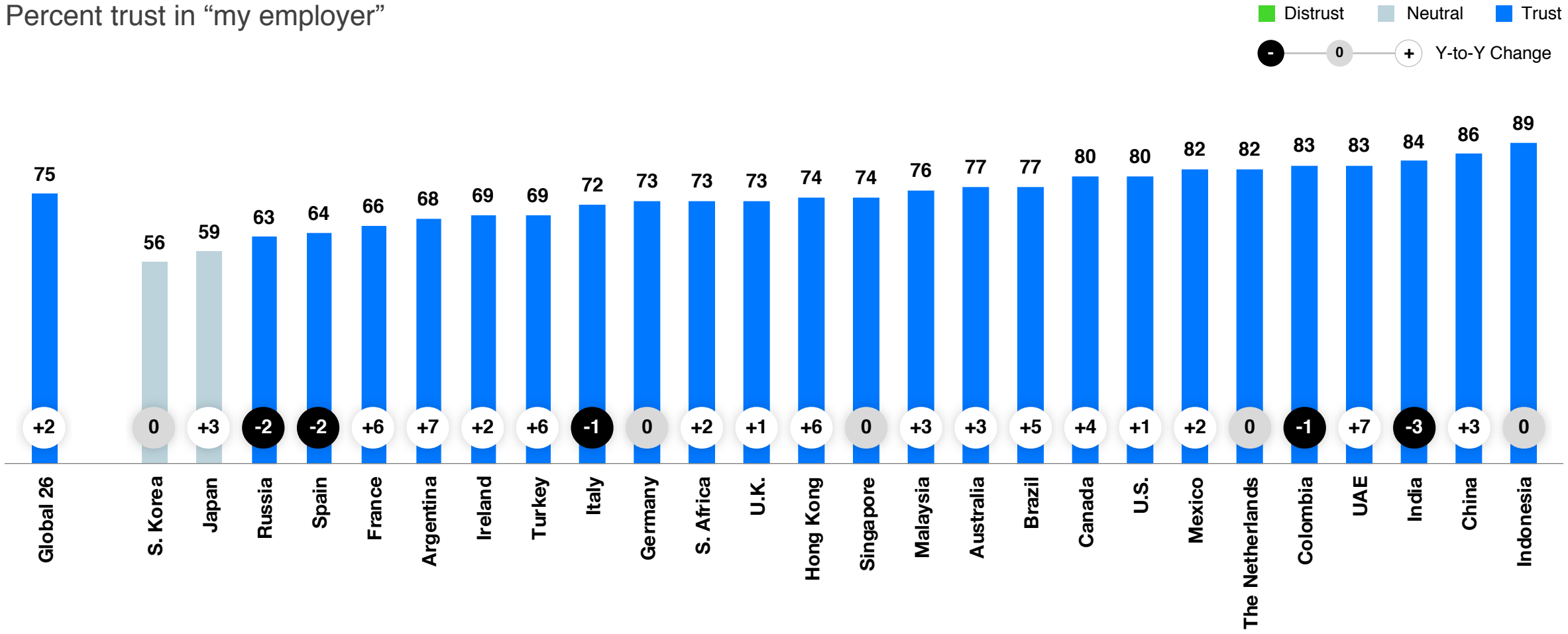
STRONG RELATIONSHIP WITH MY EMPLOYER AROUND THE WORLD

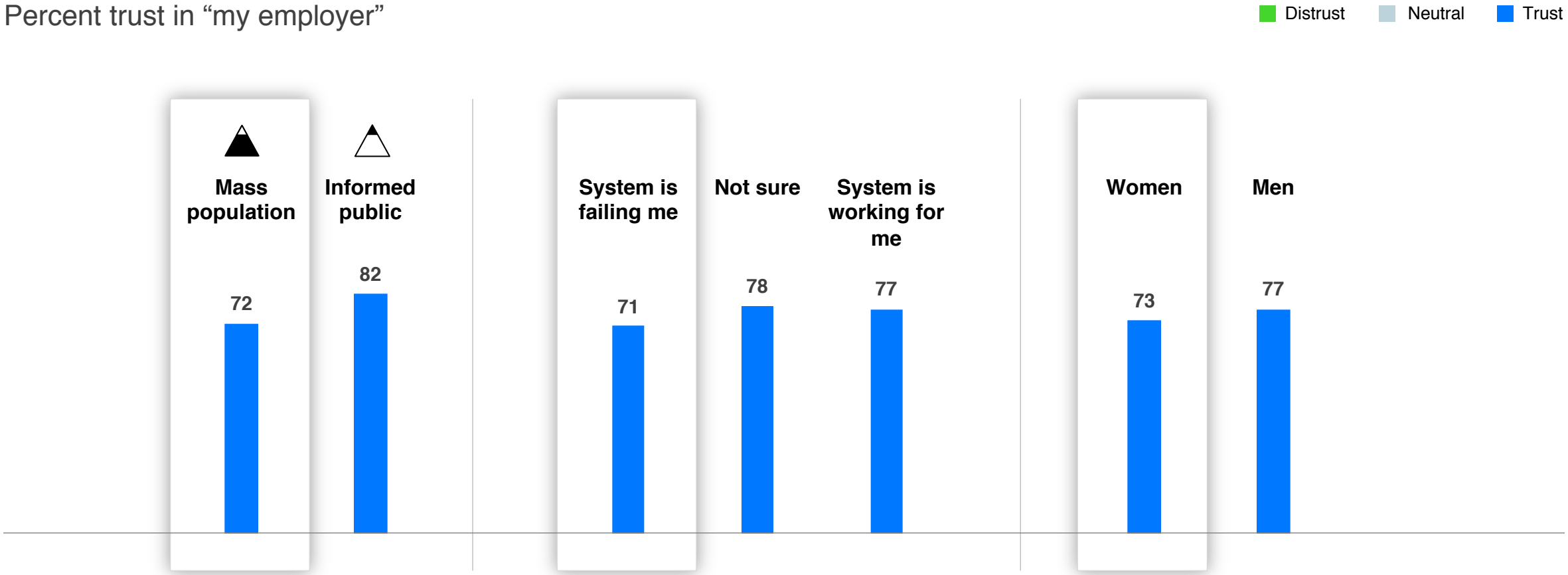
Percent trust in “my employer”



2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population employees, 26-market average.

EMPLOYERS TRUSTED EVEN BY THE DISENFRANCHISED

Percent trust in “my employer”



2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population employees, mass population employees and informed public employees, 27-market average, by gender, and “system failing” scale.

For details on how the “system failing” measure was calculated, please refer to the Technical Appendix.

EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

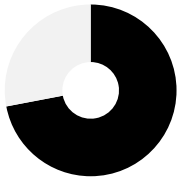
Percent who agree

I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**

All employees **58%**

Multinational employees **63%**

Employees see business as trustworthy source on:



72%
The Global Economy

58%
Technology

2019 Edelman Trust Barometer. 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, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, 27-market average. BUS_SRC. Below is a list of topics and social issues. Please indicate about which of the following you believe business in general to be a trustworthy information source. Question asked of half of the sample. General population, 27-market average, among those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7).

"The Economy" is a net of BUS_SRC/3,7,8,9,10; "Technology" is a net of BUS_SRC/2,5,6,11.

TRUSTED EMPLOYERS LEAD ON CHANGE

Top five communications topics that are most effective in increasing employer trust, as determined by discrete choice logit analysis

	Relative importance in building employer trust (A coefficient of 2 or higher is significant)
Societal Impact The organization's contributions for the betterment of society	**3.78**
Values The organization's values	**3.24**
The Future The organization's vision for the future	**3.12**
Purpose The organization's mission and purpose	**2.85**
Operations Operational decisions, including decisions that may affect my job	**2.62**

2019 Edelman Trust Barometer. EMP_COM. Good communication within an organization is important. In looking through the list of topics below, please indicate which ones the organization you work for does a good job communicating about to its employees? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average. Reported coefficients are marginal effects calculated using a discrete choice logit model which allows us to calculate the trust effect of good communication about each topic, while holding other variables constant.

Trust at Work

EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

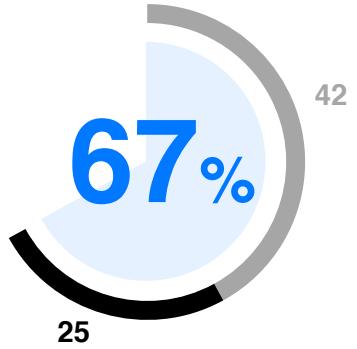
Percent of employees who expect each from a prospective employer

Strong expectation
You would have to **pay me a lot more** to work for an organization that does not offer this

Deal breaker
I would **never** work for an organization that does not offer this

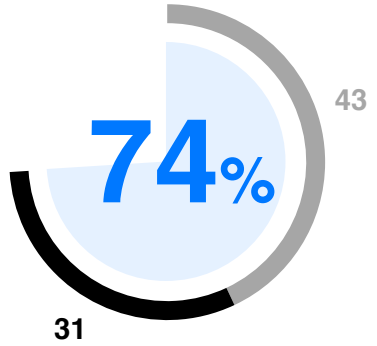
Shared Action

My employer has a greater purpose, and my job has a meaningful societal impact



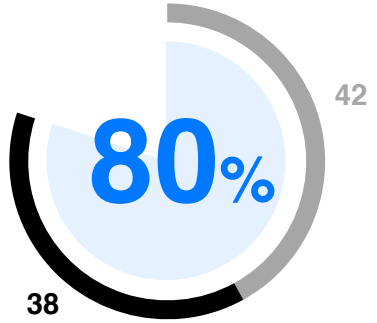
Personal Empowerment

I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



Job Opportunity

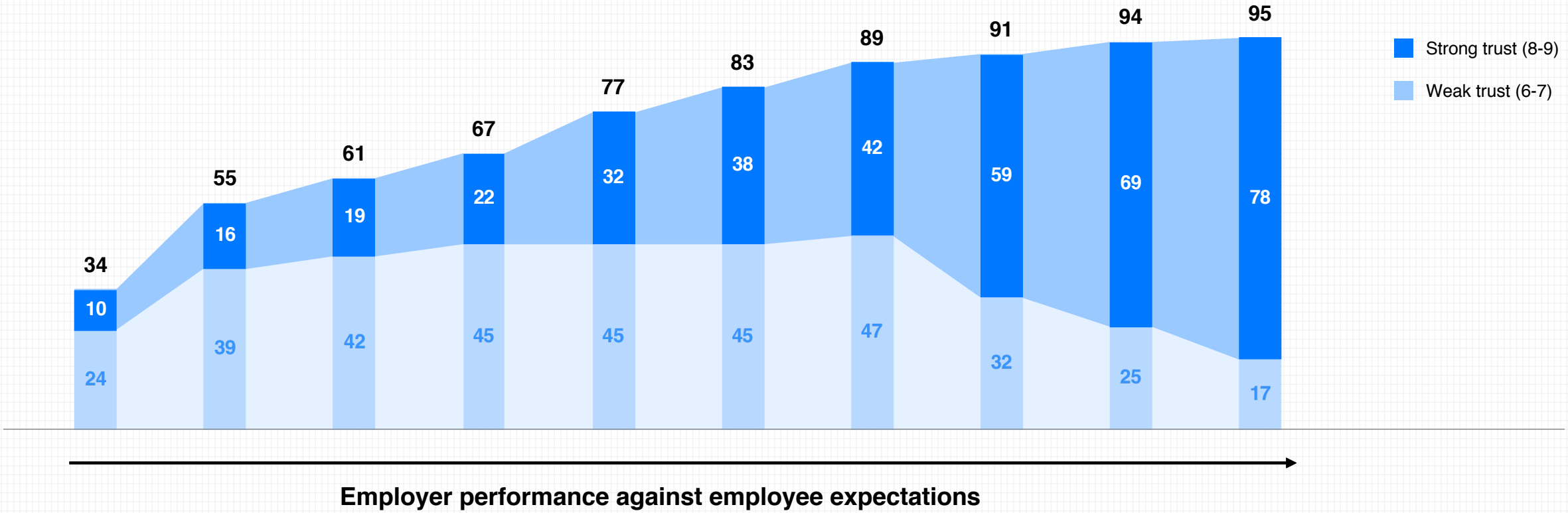
My employer offers wage growth, training, career growth and work which I find interesting & fulfilling



2019 Edelman Trust Barometer. 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? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average. Buckets are the sum of the average of codes 1 & 2 for the items that make up each dimension. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.

MEETING EMPLOYEE EXPECTATIONS BUILDS RESILIENT TRUST

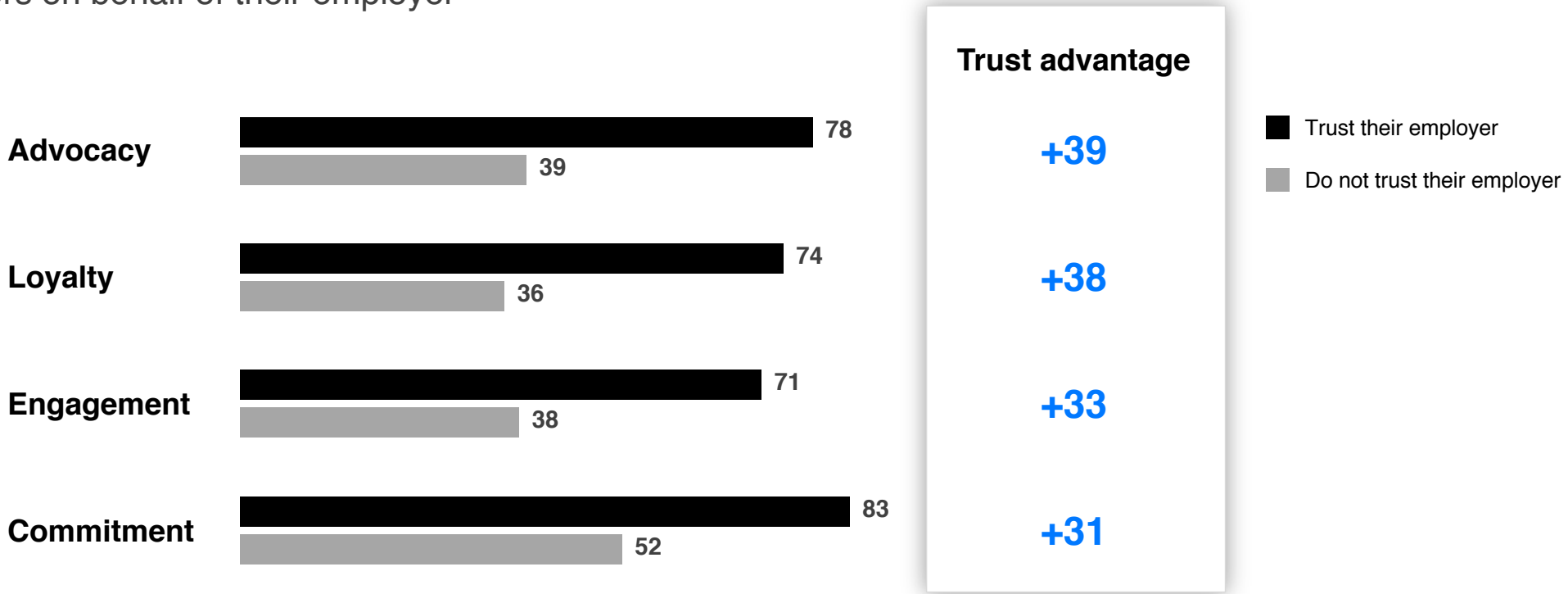
Percent who trust their employer, by degree to which employee expectations are met



2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). 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, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average. For details on how the Expectation Fulfilment score was built and modeled against trust, please refer to the Technical Appendix.

TRUST CEMENTS THE EMPLOYER-EMPLOYEE PARTNERSHIP

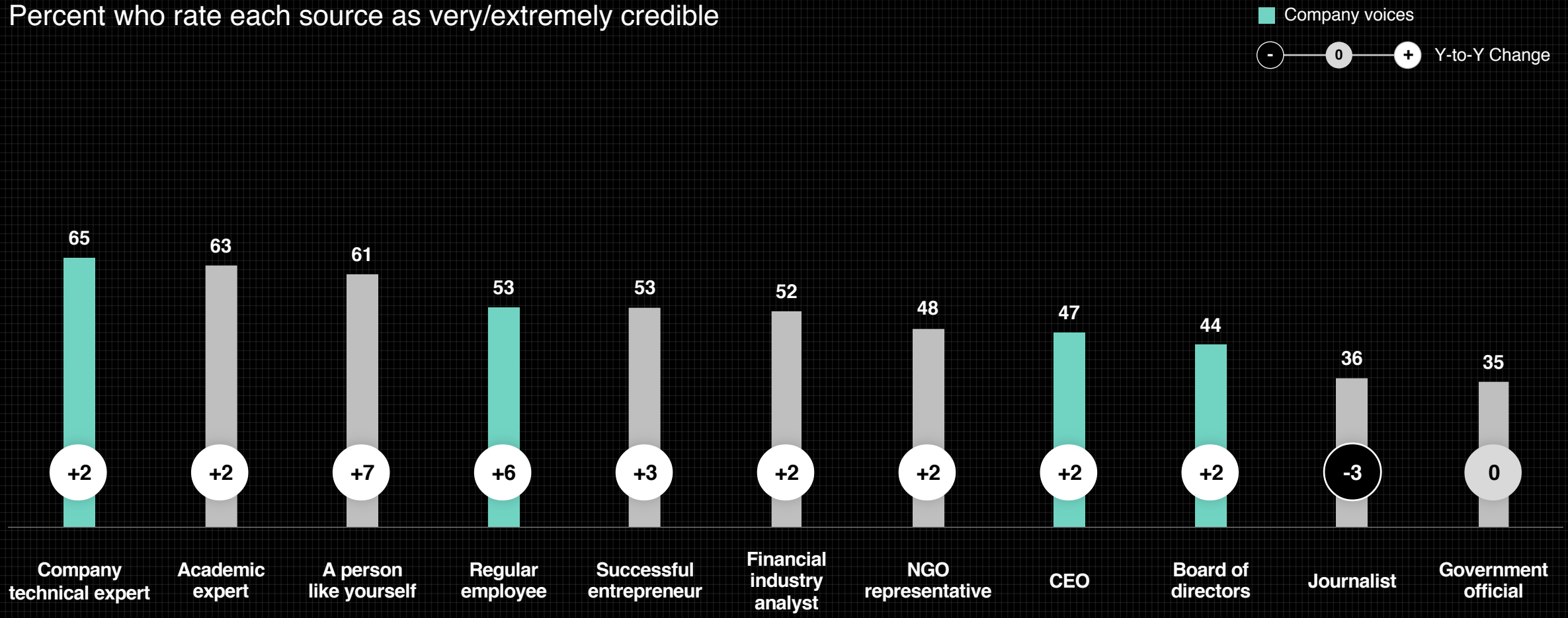
Percent of employees who engage in these types of behaviors on behalf of their employer



2019 Edelman Trust Barometer. 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, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99). TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average. Advocacy is an average of (EMP_ENG/3-5); Loyalty is an average of (EMP_ENG/1-2); Engagement is an average of (EMP_ENG/10-15); Commitment is an average of (EMP_ENG/6-9). See the tech appendix for a complete list of the items that went into each employee KPI dimension.

ACTIVATE EMPLOYEE VOICES

Percent who rate each source as very/extremely credible



2019 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, 26-market average.

INVESTING IN EMPLOYEE TRUST IS INVESTING IN YOUR BOTTOM LINE

How a company treats its employees is one of the best indicators of its level of trustworthiness

78%

Percent who agree that “a good reputation may get me to try a product, but unless I come to trust the company behind the product, I will soon stop buying it”

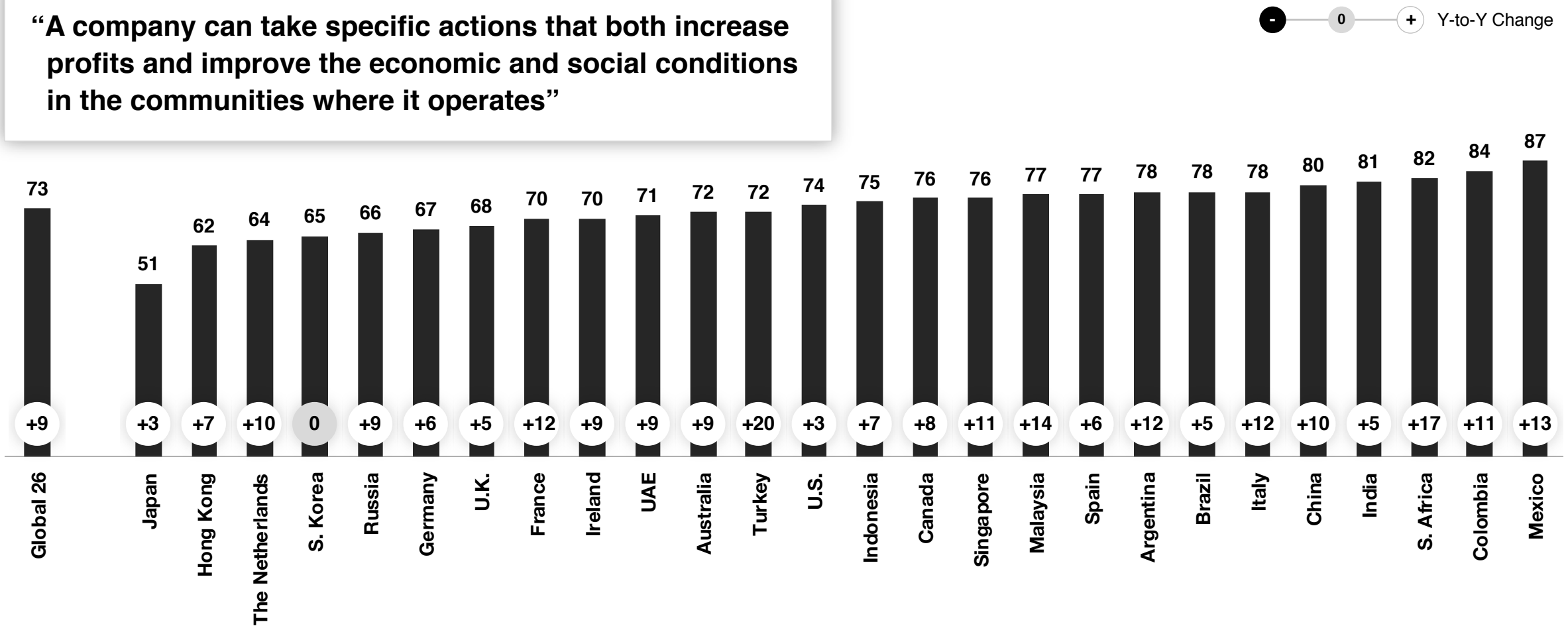
67%

2019 Edelman Trust Barometer. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree.
Question asked of half the sample. General population, 27-market average.

COMPANIES CAN IMPROVE SOCIETY—AND ALSO DO WELL

Percent who agree

"A company can take specific actions that both increase profits and improve the economic and social conditions in the communities where it operates"



2019 Edelman Trust Barometer. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree.
Question asked of half the sample. General population, 26-market average.

TRUST AT WORK:
THE NEW EMPLOYER-EMPLOYEE CONTRACT

1. Lead Change

- Be aspirational
- Address concerns about the personal impact of change
- Train the workforce of the future

2. Empower Employees

- Give them a voice
- Create opportunities for shared action
- Empower them with information

3. Start Locally

- Solve problems at home
- Improve societal conditions in the local communities in which you operate

4. CEO Leadership

- Live your values
- Engage directly
- Be visible and show a personal commitment, inside and outside the organization

Supplemental Data Appendix

2019 Edelman Trust Barometer

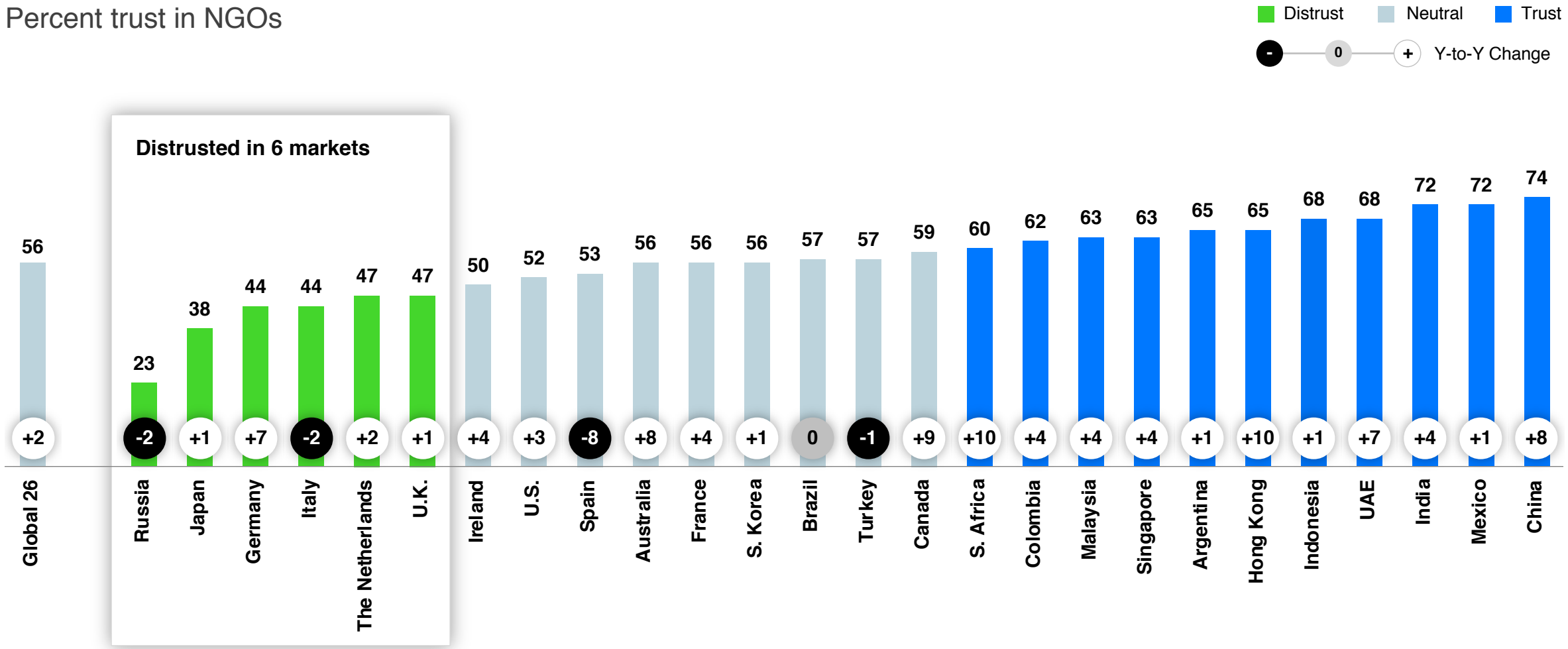
TABLE OF CONTENTS

Supplemental Data

1. Trust in institutions
   - NGOs
   - Business
   - Government
   - The European Union
   - The United Nations
   - By Gender
2. Trust in industry sectors
3. Trust in countries of origin
4. Trust in news sources
5. Media engagement segments
6. Employee expectations

TRUST IN NGOS INCREASES IN 21 OF 26 MARKETS

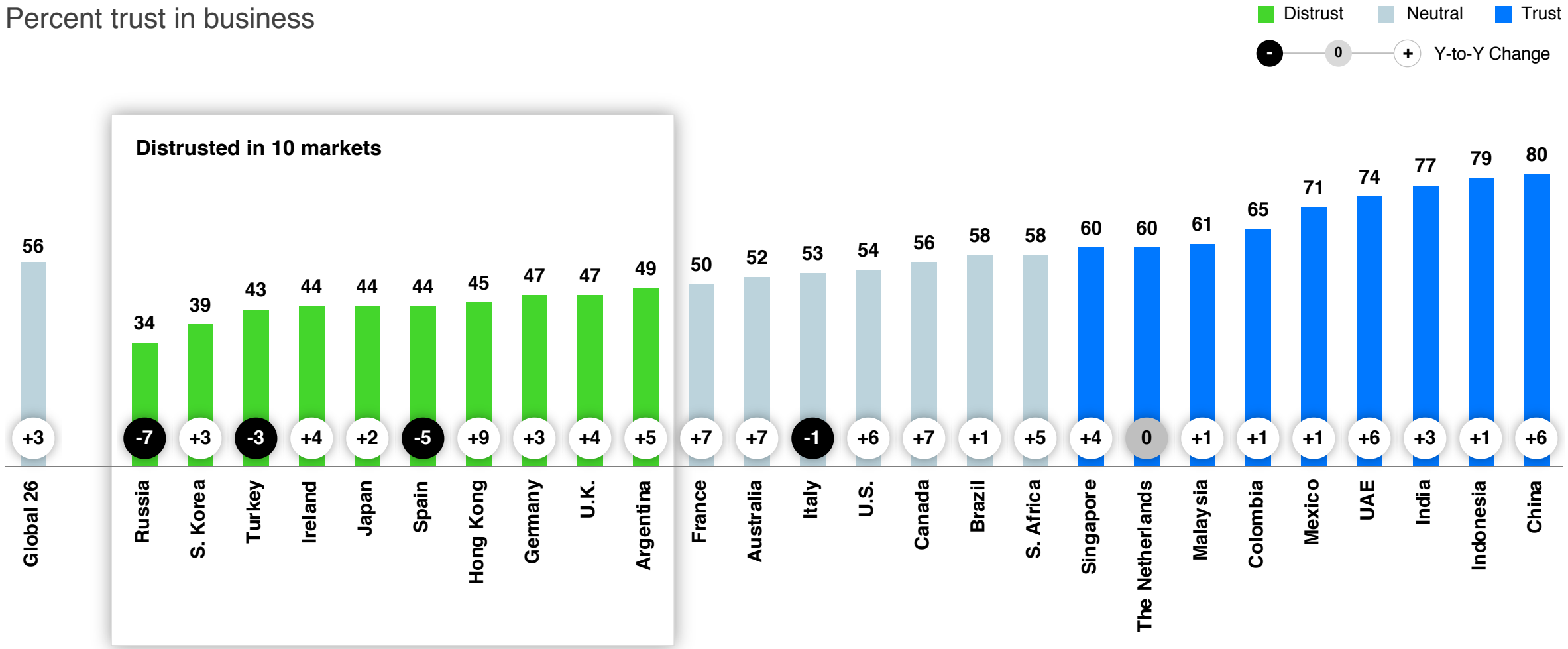
Percent trust in NGOs



2019 Edelman Trust Barometer. TRU_INS. [NGOs IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

TRUST IN BUSINESS INCREASES IN 21 OF 26 MARKETS

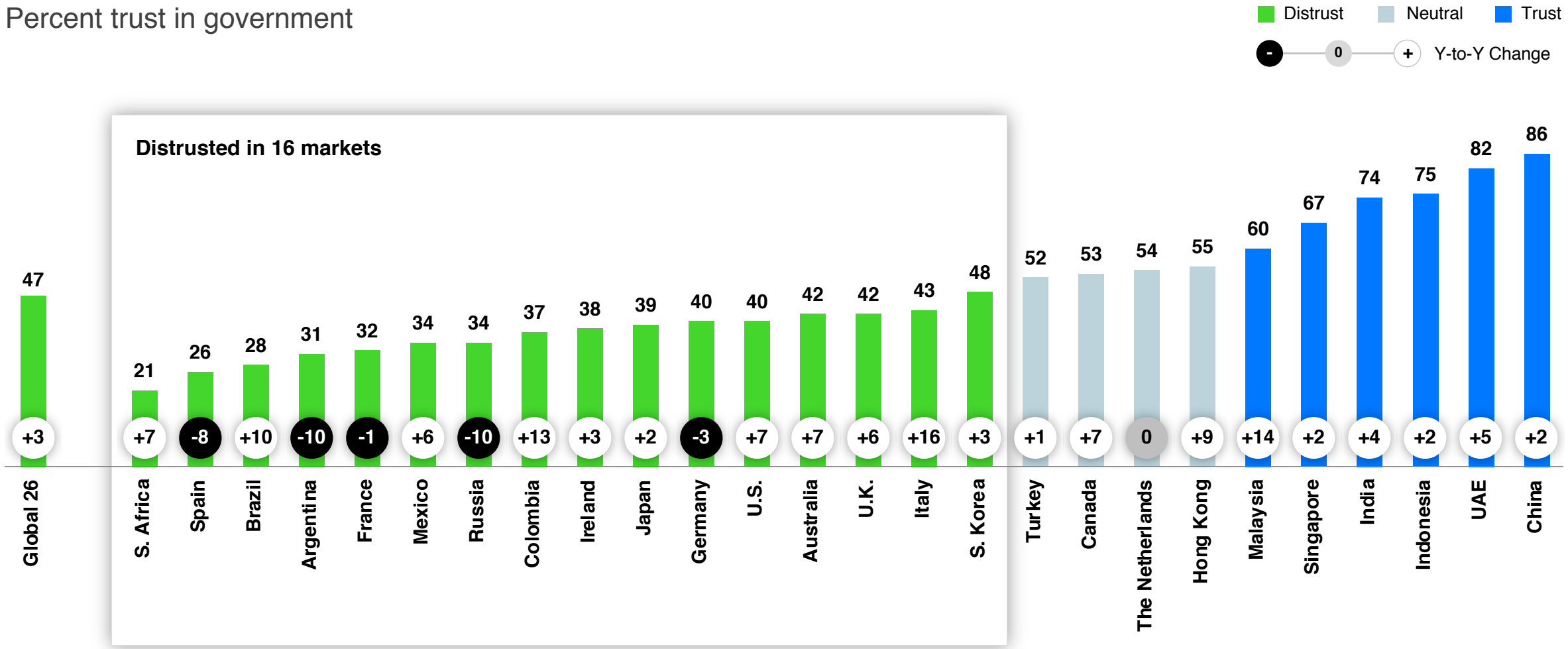
Percent trust in business



2019 Edelman Trust Barometer. TRU_INS. [BUSINESS IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

TRUST IN GOVERNMENT INCREASES IN 20 OF 26 MARKETS

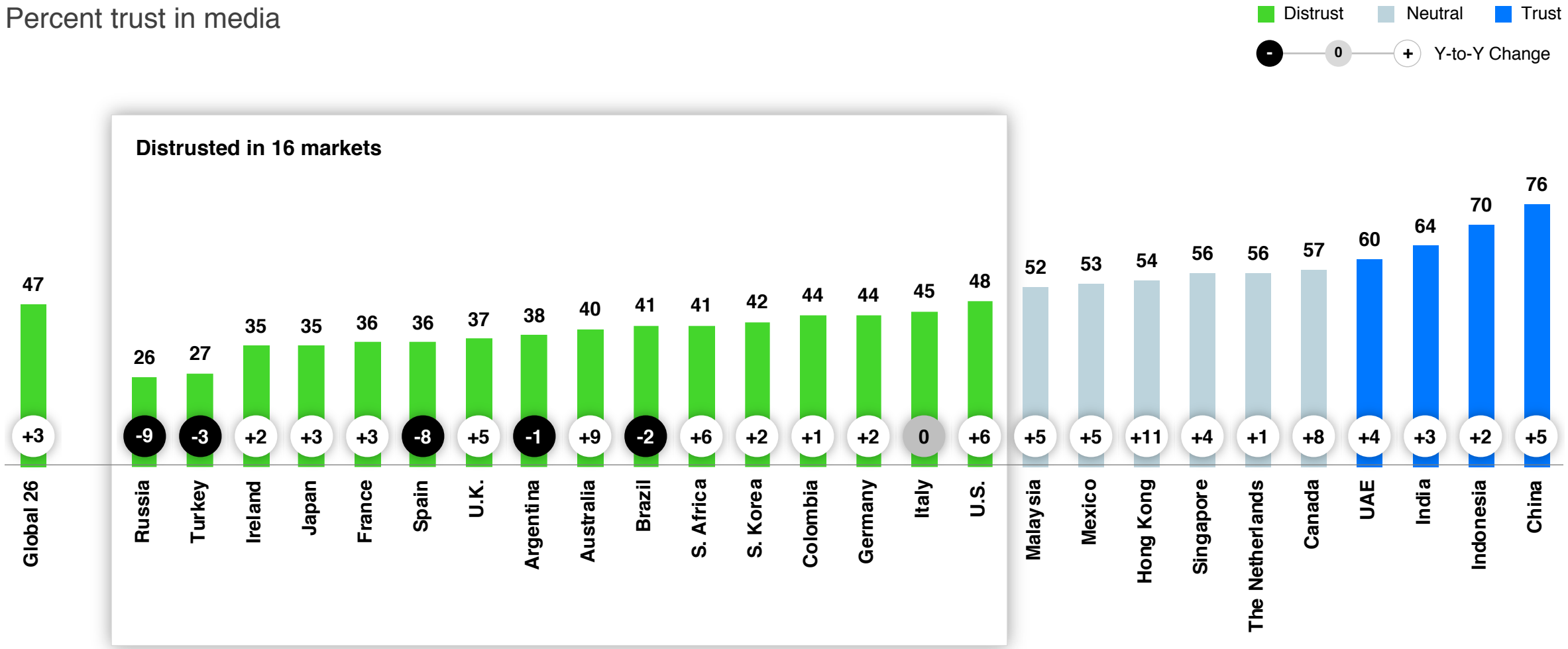
Percent trust in government



2019 Edelman Trust Barometer. TRU_INS. [GOVERNMENT IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

TRUST IN MEDIA RISES, REMAINS LEAST-TRUSTED INSTITUTION

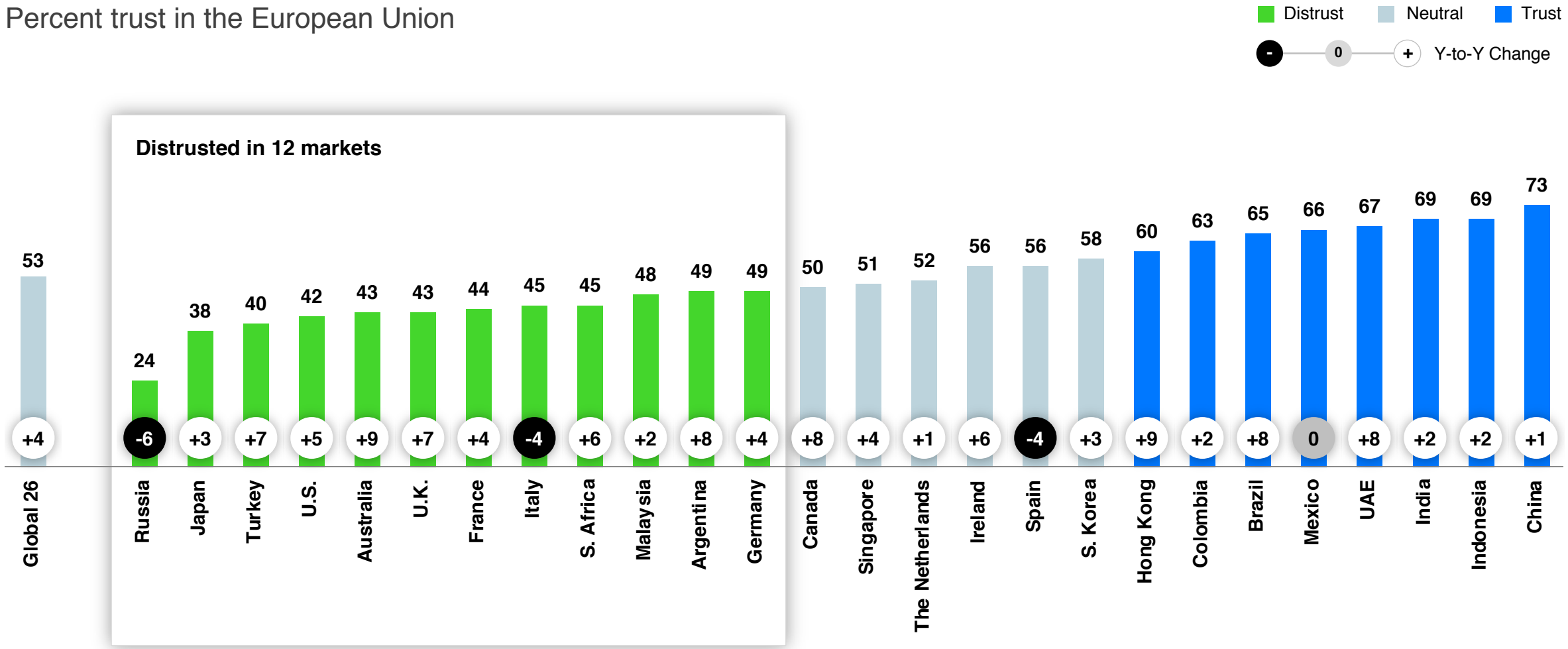
Percent trust in media



2019 Edelman Trust Barometer. TRU_INS. [MEDIA IN GENERAL] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

TRUST IN THE EUROPEAN UNION INCREASES IN 22 OF 26 MARKETS

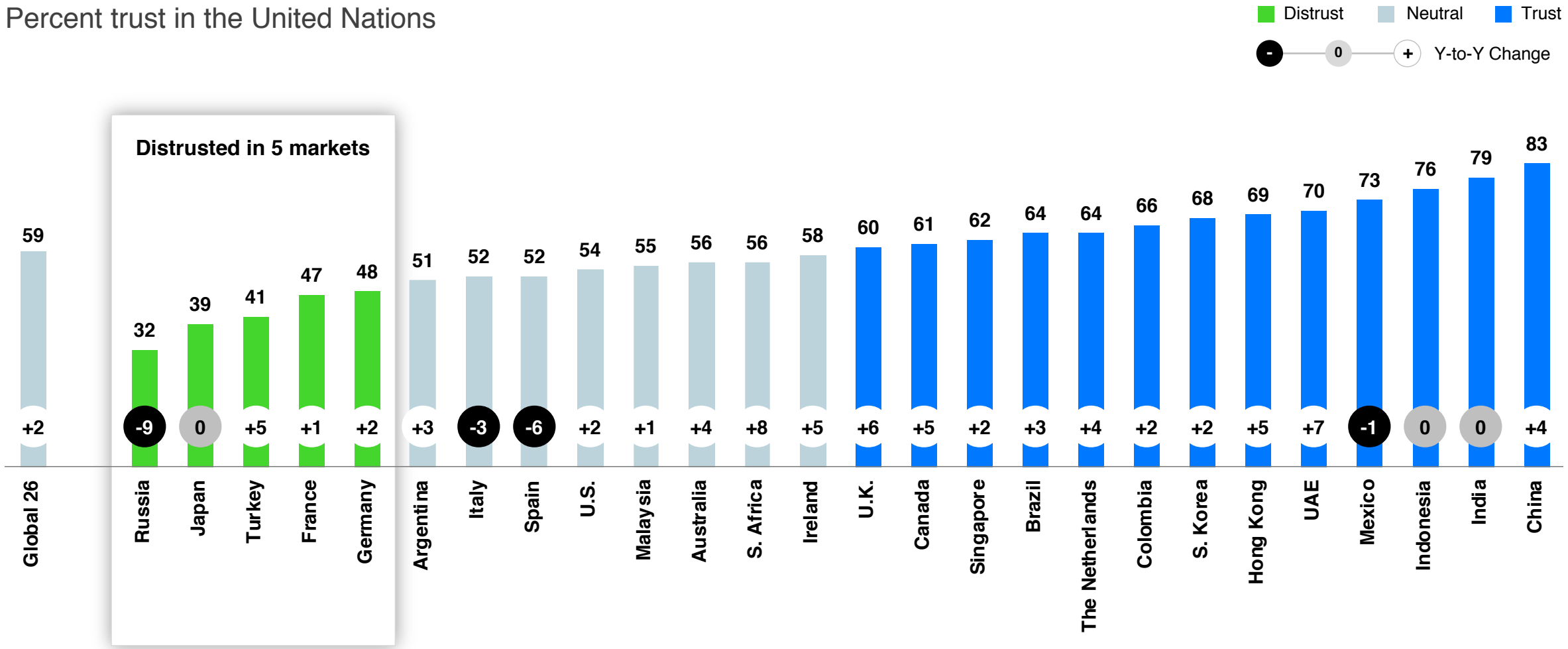
Percent trust in the European Union



2019 Edelman Trust Barometer. TRU_INS. [European Union] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

TRUST IN THE UNITED NATIONS INCREASES IN 19 OF 26 MARKETS

Percent trust in the United Nations



2019 Edelman Trust Barometer. TRU_INS. [United Nations] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 26-market average.

TRUST IN INSTITUTIONS, MEN VS WOMEN

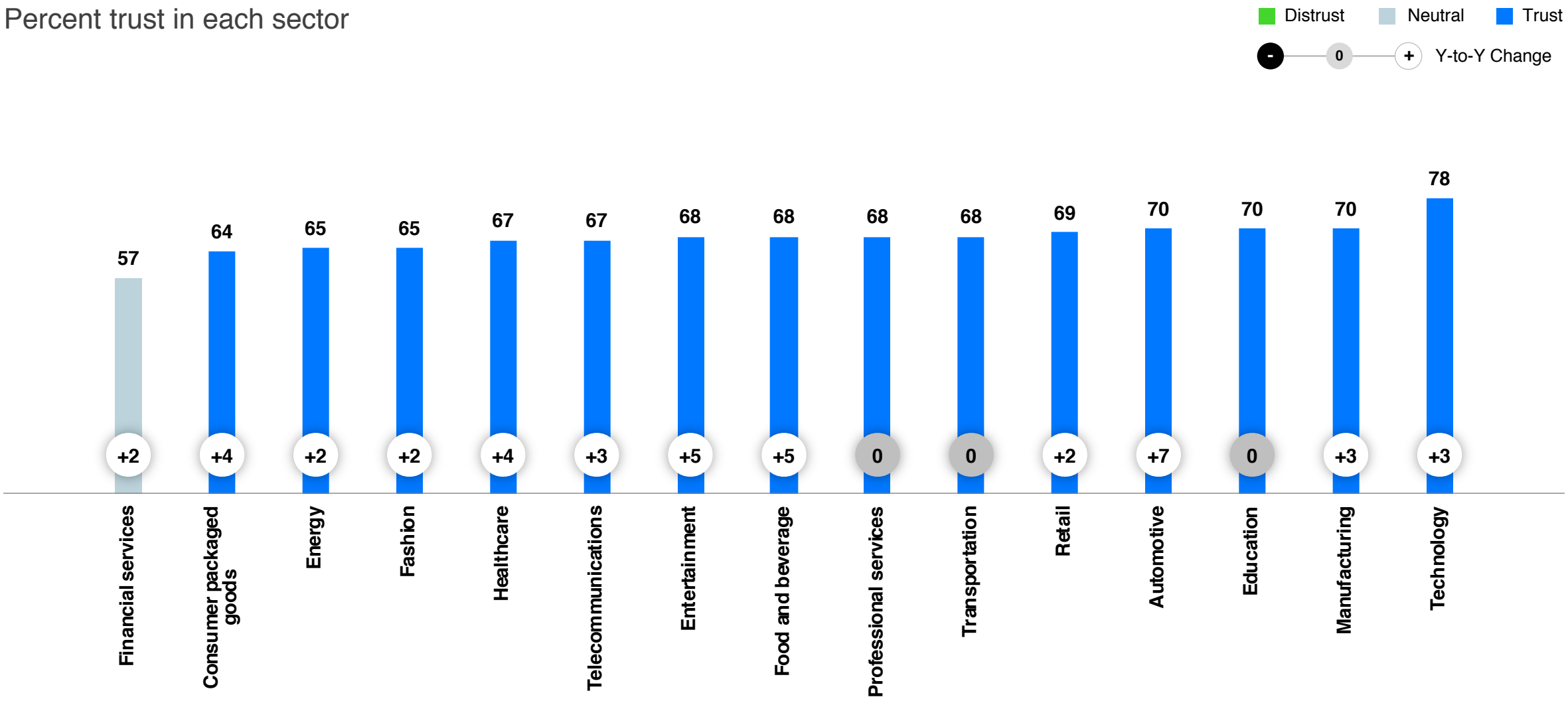
Percent trust

	Global 27			Argentina			Australia			Brazil			Canada			China			Colombia		
	M	W	Gap	M	W	Gap	M	W	Gap	M	W	Gap	M	W	Gap	M	W	Gap	M	W	Gap
Business	60	53	7	51	47	4	55	49	6	60	56	4	59	53	6	81	78	3	68	63	5
Government	51	46	5	31	31	0	45	39	6	27	28	1	56	50	6	86	86	0	41	33	8
NGOs	58	55	3	63	67	4	60	52	8	52	62	10	62	55	7	76	71	5	60	63	3
Media	50	45	5	36	40	4	42	38	4	41	41	0	61	53	8	79	73	6	46	41	5
Trust Index	**55**	**50**	**5**	**45**	**46**	**1**	**51**	**45**	**6**	**45**	**47**	**2**	**60**	**53**	**7**	**81**	**77**	**4**	**54**	**50**	**4**
	France			**Germany**			**Hong Kong**			**India**			**Indonesia**			**Ireland**			**Italy**		
Business	55	45	10	54	40	14	48	43	5	78	76	2	80	79	1	46	42	4	56	51	5
Government	35	29	6	45	35	10	56	54	2	73	74	1	74	76	2	40	35	5	46	40	6
NGOs	60	52	8	49	38	11	64	65	1	72	72	0	67	69	2	50	51	1	41	47	6
Media	39	33	6	50	39	11	56	53	3	66	62	4	71	68	3	37	33	4	42	47	5
Trust Index	**47**	**40**	**7**	**50**	**38**	**12**	**56**	**54**	**2**	**72**	**71**	**1**	**73**	**73**	**0**	**43**	**40**	**3**	**46**	**46**	**0**
	Japan			**Malaysia**			**Mexico**			**Russia**			**Saudi Arabia**			**Singapore**			**S. Africa**		
Business	47	40	7	60	61	1	75	68	7	34	34	0	77	69	8	59	60	1	63	52	11
Government	44	34	10	61	60	1	36	32	4	32	36	4	80	73	7	64	70	6	26	16	10
NGOs	43	32	11	61	65	4	74	71	3	21	24	3	68	64	4	63	63	0	64	56	8
Media	41	30	11	50	53	3	56	51	5	24	29	5	64	61	3	56	56	0	45	36	9
Trust Index	**44**	**34**	**10**	**58**	**60**	**2**	**60**	**56**	**4**	**28**	**31**	**3**	**72**	**67**	**5**	**61**	**62**	**1**	**50**	**40**	**10**
	S.Korea			**Spain**			**The Netherlands**			**Turkey**			**UAE**			**U.K.**			**U.S.**		
Business	43	34	9	47	42	5	63	56	7	47	39	8	78	64	14	51	44	7	62	47	15
Government	50	46	4	28	23	5	53	55	2	53	50	3	83	78	5	45	39	6	44	35	9
NGOs	58	53	5	54	53	1	51	44	7	56	59	3	69	65	4	49	45	4	59	45	14
Media	46	38	8	36	37	1	60	53	7	25	28	3	65	49	16	41	33	8	52	44	8
Trust Index	**49**	**43**	**6**	**41**	**39**	**2**	**57**	**52**	**5**	**45**	**44**	**1**	**74**	**64**	**10**	**47**	**40**	**7**	**54**	**43**	**11**

2019 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 using a nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal." 9-point scale; top 4 box, trust. General population, 27-market global average.

TRUST INCREASES IN 12 OF 15 SECTORS

Percent trust in each sector



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

INDUSTRY SECTORS AT FIVE-YEAR HIGHS

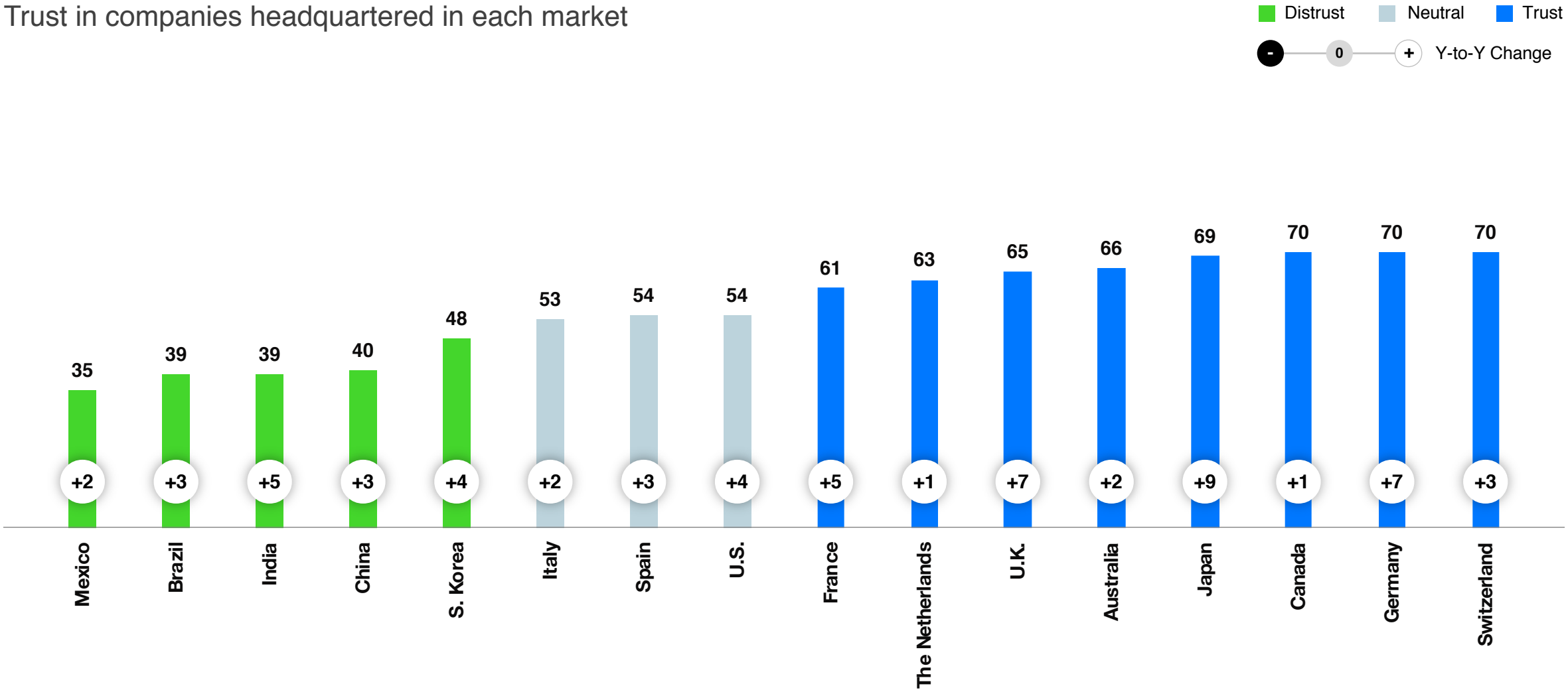
Percent trust in each sector

Industry	2015	2016	2017	2018	2019	5yr. trend
Technology	74	75	76	75	78	+4
Automotive	67	61	66	62	69	+2
Entertainment	64	65	65	63	68	+4
Food and beverage	64	65	68	64	68	+4
Healthcare	-	64	67	65	68	n/a
Telecommunications	60	61	64	64	67	+7
Consumer packaged goods	61	62	64	61	65	+4
Energy	57	59	63	63	65	+8
Financial services	49	53	55	55	57	+8

2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 23-market average.

TRUST RISES FOR ALL COUNTRY BRANDS

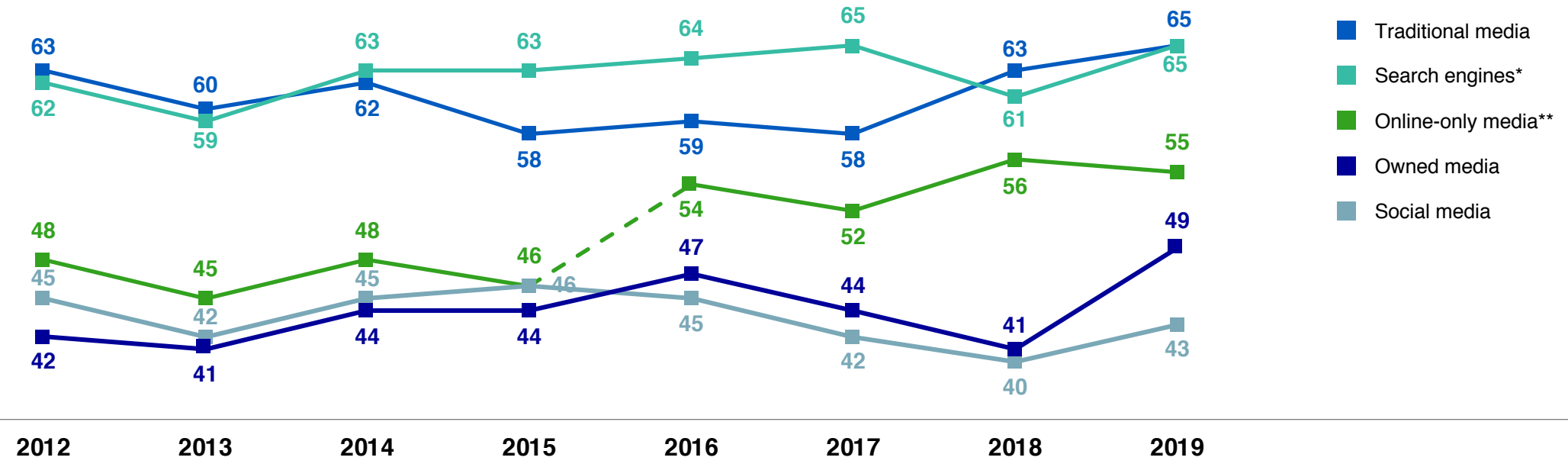
Trust in companies headquartered in each market



2019 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same nine-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Markets shown to half of the sample. General population, 26-market average.

TRADITIONAL MEDIA, SEARCH MOST TRUSTED

Percent trust in each source for general news and information



2019 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? Please use a nine-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal." 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 23-market average.

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

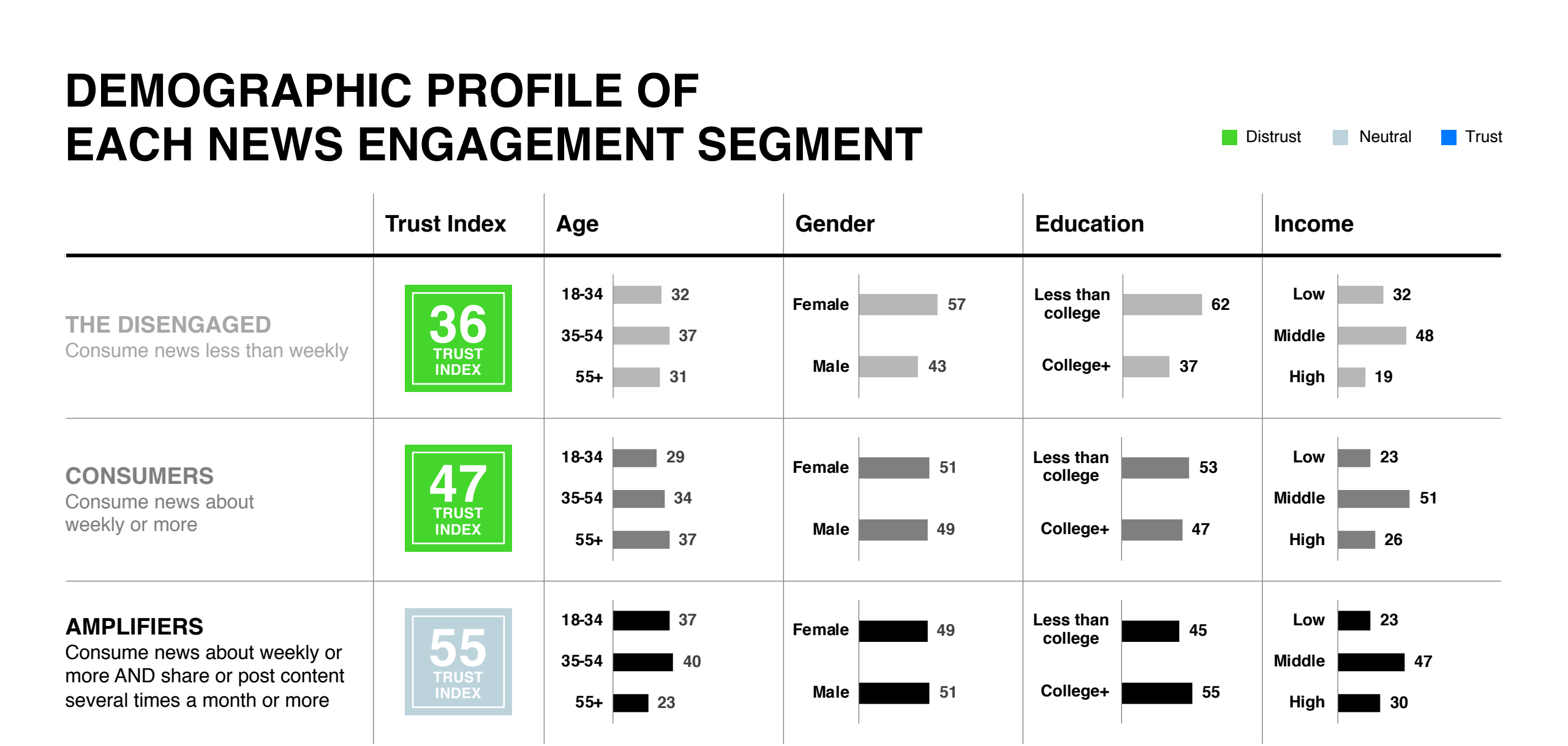
NEWS ENGAGEMENT SEGMENTS ACROSS MARKETS

Percent in each segment

	Global 26			Argentina			Australia			Brazil			Canada			China			Colombia			France			Germany		
	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y	2018	2019	Y-to-Y
Disengaged	49	28	-21	46	24	-22	60	34	-26	39	17	-22	54	33	-21	26	11	-15	38	21	-17	61	37	-24	67	49	-18
Consumers	24	32	8	26	28	2	28	46	18	23	25	2	31	42	11	28	24	-4	28	26	-2	23	36	13	15	28	13
Amplifiers	26	40	14	29	48	19	12	20	8	38	58	20	16	26	10	47	65	18	34	53	19	17	27	10	18	23	5
	Hong Kong			**India**			**Indonesia**			**Ireland**			**Italy**			**Japan**			**Malaysia**			**Mexico**			**Russia**		
Disengaged	40	20	-20	35	19	-16	45	19	-26	52	34	-18	54	31	-23	72	46	-26	45	19	-26	47	21	-26	47	24	-23
Consumers	31	39	8	19	18	-1	17	26	9	32	40	8	19	24	5	18	37	19	19	24	5	19	24	5	32	30	-2
Amplifiers	29	41	12	46	63	17	38	55	17	16	25	9	27	45	18	10	17	7	36	57	21	34	54	20	21	46	25
	Singapore			**S. Africa**			**S.Korea**			**Spain**			**The Netherlands**			**Turkey**			**U.K.**			**U.S.**			**UAE**		
Disengaged	49	24	-25	48	27	-21	60	36	-24	46	22	-24	53	29	-24	31	16	-15	59	37	-22	59	37	-22	55	39	-16
Consumers	30	40	10	24	32	8	18	27	9	26	36	10	34	47	13	23	20	-3	26	37	12	26	37	12	26	33	7
Amplifiers	21	36	15	27	41	13	22	36	14	28	43	15	14	24	10	45	65	20	16	26	10	16	26	10	20	27	7

2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. General population, 26-market average. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

DEMOGRAPHIC PROFILE OF EACH NEWS ENGAGEMENT SEGMENT



2019 Edelman Trust Barometer. The Trust Index is an average of a market's trust in the institutions of government, business, media and NGOs. S15. What is your current age? S6. Are you male or female? S7. What is the last grade in school you completed? S8. Thinking about your annual household income in 2017, which of the following categories best describes your total household income that year? General population, 27-market average, by the News Engagement Scale.

For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

EMPLOYEE EXPECTATIONS IN DETAIL

	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap
Job Opportunity	**42**	**38**	**80**	**61**	**19**
Wages keep up with the cost of living	40	44	84	58	25
Interesting work experience	43	37	80	68	12
Training programs	43	36	79	63	16
Career opportunities	42	35	77	56	21
Personal Empowerment	**43**	**31**	**74**	**58**	**16**
Management always tells the truth	38	41	79	55	24
Regular communications	44	34	78	61	17
Employees have a voice	46	31	77	59	18
CEO embodies organization's values	42	32	73	60	13
Employees included in planning	44	27	71	57	14
Diversity at all levels	44	27	71	61	9
Organization acts on its values	40	24	64	50	14
Shared Action	**42**	**25**	**67**	**56**	**10**
Shared values	44	29	72	59	13
Greater purpose	44	28	71	67	4
Meaningful work	44	27	71	59	12
Opportunities to address social problems	42	24	66	55	11
CEO speaks up on issues	35	19	54	48	6
Listens to employee objections	41	20	61	46	15

2019 Edelman Trust Barometer. 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? 3-point scale; code 1, very important (I would never work for an organization that lacked this characteristic); code 2, important (The pay or other benefits would have to be significantly higher than my other options to compensate for this not being a characteristic of the organization). Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). 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, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average.

EMPLOYEE EXPECTATIONS ACROSS DEMOGRAPHICS

By age	18-34					35-54					55+				
	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap
Job Opportunity	41	40	81	64	17	43	36	79	61	18	41	37	78	57	21
Personal Empowerment	43	32	75	61	14	43	30	73	56	17	40	32	72	52	20
Shared Action	42	26	68	59	9	42	24	66	55	11	38	23	61	48	13

By gender	Men					Women				
	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap
Job Opportunity	43	37	80	64	16	41	39	80	59	21
Personal Empowerment	43	30	73	60	13	42	31	73	55	18
Shared Action	42	25	67	59	8	41	25	66	53	13

2019 Edelman Trust Barometer. 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? 3-point scale; code 1, very important (I would never work for an organization that lacked this characteristic); code 2, important (The pay or other benefits would have to be significantly higher than my other options to compensate for this not being a characteristic of the organization). Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). 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, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average, by age and gender.

Technical Appendix

WHY EDELMAN STUDIES TRUST

In modern society, we delegate important aspects of our well-being to the four institutions of business (economic well-being), government (national security and public policy), media (information and knowledge) and NGOs (social causes and issues).

In order to feel safe delegating important aspects of our lives and well-being to others, we need to trust them to act with integrity and with our best interests in mind. Trust, therefore, is at the heart of an individual's relationship with an institution and, by association, its leadership.

If trust in these institutions diminishes, we begin to fear that we are no longer in safe, reliable hands. Without trust, the fabric of society can unravel to the detriment of all.

From an institutional standpoint, trust is a forward-looking metric. Unlike reputation, which is based on an organization's historical behavior, trust is a predictor of whether stakeholders will find you credible in the future, will embrace new innovations you introduce and will enthusiastically support or defend you.

For these reasons, trust is a valuable asset for all institutions, and ongoing trust-building activities should be one of the most important strategic priorities for every organization.

2019 Edelman Trust Barometer

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19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

All fieldwork was conducted between October 19 and November 16, 2018

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% (26,000+), half-sample global general online population +/- 0.8 (N=15,525).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N=min 200, varies by market, China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N =min 739, varies by market).

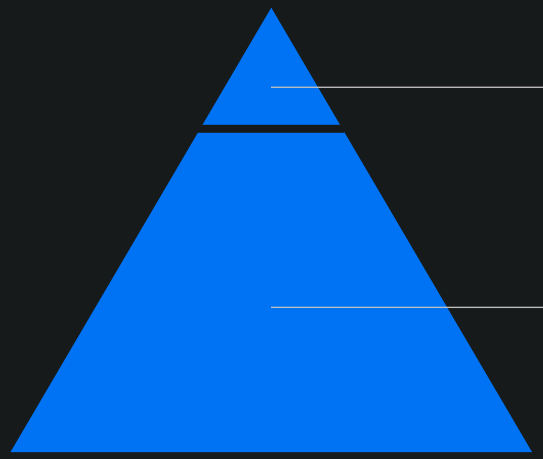
Employee MOE: 27-market = +/- 0.8% (N=16,944)
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

General Online Population

1,150 respondents per market

Ages 18+

All slides show general online population data unless otherwise noted



Informed Public

500 respondents in U.S. and China; 200 in all other markets

Represents 16% of total global population

Must meet 4 criteria

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

Mass Population

All population not including informed public

Represents 84% of total global population

2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed)

Oversample of employees of multinational companies: 500 respondents per market

SAMPLE SIZE, QUOTAS AND MARGIN OF ERROR

	General Population			Informed Public		
	Sample Size*	Quotas Set On**	Margin of Error	Sample Size*	Quotas Set On***	Margin of Error
Global	31,050	Age, Gender, Region	+/- 0.6% total sample +/- 0.8% half sample	6000	Age, Education, Gender, Income	+/- 1.2% total sample +/- 1.8% split sample
China and U.S.	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	500	Age, Education, Gender, Income	+/- 4.4% total sample +/- 6.2% split sample
All other markets	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	200	Age, Education, Gender, Income	+/- 6.9% total sample +/- 9.8% split sample

* Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.
** In the U.S., U.K. and UAE, there were additional quotas on ethnicity.
*** In the UAE, there were additional quotas on ethnicity.

LANGUAGES AND INTERNET PENETRATION BY MARKET

The Edelman Trust Barometer is an online survey. In developed markets, a nationally- representative online sample closely mirrors the general population. In markets with lower levels of internet penetration, a nationally-representative online sample will be more affluent, educated and urban than the general population.

	Languages	Internet Penetration*
Global	-	55%
Argentina	Localized Spanish	79%
Australia	English	88%
Brazil	Portuguese	66%
Canada	English & French Canadian	90%
China	Simplified Chinese	57%
Colombia	Localized Spanish	58%
France	French	93%
Germany	German	96%
Hong Kong	English & Traditional Chinese	87%

	Languages	Internet Penetration*
India	Hindi & English	34%
Indonesia	Indonesian	50%
Ireland	English	93%
Italy	Italian	92%
Japan	Japanese	93%
Malaysia	Malay	79%
Mexico	Localized Spanish	65%
Netherlands	Dutch & English	96%
Russia	Russian	76%
Saudi Arabia	Arabic & English	90%

	Languages	Internet Penetration*
Singapore	English & Simplified Chinese	84%
South Africa	English & Afrikaans	54%
South Korea	Korean	93%
Spain	Spanish	93%
Turkey	Turkish	68%
UAE	Arabic & English	98%
U.K.	English	95%
U.S.	English	88%

*Data source: http://www.internet worldstats.com/stats.htm (June 30, 2018 for Asian and Middle Eastern markets; December, 2017 for European and North American markets,)

HOW DID WE MEASURE BELIEF IN THE SYSTEM?

Four dimensions were examined to determine whether or not respondents believe the system is failing them:

1) A **sense of injustice** stemming from the perception that society's elites have co-opted the system to their own advantage at the expense of regular people,
2) A **lack of hope** that the future will be better for you and your family,
3) A **lack of confidence** in the leaders of societal institutions to solve the country's problems, and
4) A **desire for** forceful reformers in positions of power that are capable of bring about much-needed **change**.

Overall scores were calculated by taking the average of the nine item scores.

Respondents were categorized into one of three segments based their mean score:

- Those who averaged 6.00 or higher believe the ***system is failing*** them
- Those who averaged between 5.00 and 5.99 were labelled as ***uncertain***
- Those who averaged less than 5.00 believe the ***system is working***

Respondents were asked:

For each one, please rate how **true** you believe that statement is using a nine-point scale where one means it is "**not at all true**" and nine means it is "**completely true**".

Sense of Injustice Items

"The elites who run our institutions are out of touch with regular people" *POP_MDCr8*

"The elites who run our institutions are indifferent to the will of the people" *POP_MDCr1*

"As regular people struggle just to pay their bills, the elites are getting richer than they deserve" *POP_MDCr2*

"The system is biased against regular people and in favor of the rich and powerful" *POP_MDCr3*

Lack of Hope Items

"My hard work will be rewarded" (reverse scored) *POP_MDCr18*

"My children will have a better life than I do" (reverse scored) *POP_MDCr19*

"The country is moving in the right direction" (reverse scored) *POP_MDCr20*

Lack of Confidence Items

"I do not have confidence that our current leaders will be able to address our country's challenges" *POP_MDCr10*

Desire for Change Items

"We need forceful reformers in positions of power to bring about much-needed change" *POP_MDCr9*

HOW DID WE DEFINE THE NEWS ENGAGEMENT SEGMENTS?

The three news engagement segments shown on slide 22 of the global report (The Disengaged, Consumers, and Amplifiers) were defined based on two scales.

The first scale measured news consumption and the second measured sharing and posting of news content. Both scales were based on an average of two activities, rated on a seven-point scale of how often the respondent engaged in the activities. We used both scales together to determine three levels of overall news engagement.

We discovered that those who scored high on the posting/sharing scale were very unlikely to score low on the consumption scale, and those who scored low on the consumption scale were very unlikely to score high on the sharing/posting scale. As a result, despite there being four possible high/low combinations of the two scales, we chose to segment respondents into only three groups as defined below.

	Consumption	Sharing and Posting
The Disengaged	Less than weekly	Less than several times a month
Consumers	About weekly or more	Less than several times a month
Amplifiers	About weekly or more	Several times a month or more

News Consumption Scale Items

- Read, view or listen to news and information produced by major news organizations or publications at the original source
- Read news and information from major news organizations sent to me by others or pushed to me on a news feed, social network platform or application

News Content Sharing/Posting Scale Items

- Share or forward news items that I find to be interesting
- Create and post my own opinions or other news/information content on social media platforms or other online sites

Activity frequency scale response options

- I never do this
- I occasionally do this
- I do this several times a month
- I do this weekly
- I do this several times a week
- I do this daily
- I do this several times a day

HOW DID WE MEASURE EMPLOYEE EXPECTATIONS?

We identified three dimensions of employee expectations:

1) **Job Opportunity:** My employer offers good wages, training, career growth and interesting work experiences
2) **Personal Empowerment:** I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive
3) **Shared Action:** My employer has a greater purpose, and my work has a meaningful societal impact

Respondents were asked:

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?

Very important: I would never work for an organization that lacked this characteristic.

Important: The pay or other benefits would have to be significantly higher than my other options to compensate for this not being a characteristic of the organization.

Not very important: This might be nice to have but it isn't very important to me

Job Opportunity Items

- They offer training programs to help employees keep their skills up-to-date
- There are many opportunities for me to move up within the organization
- They ensure that their employees' wages keep up with increases in the cost of living over time
- They offer me interesting and valuable work experiences

Personal Empowerment Items

- The employees at all levels within the organization reflect the diversity of the customers and community it serves
- Management always tells employees the truth
- The organization refuses to promote or reward people who do not live up to its values even if they perform well in other ways
- Management communicates regularly with employees about what is happening within the organization
- The CEO's actions embody the values of the organization
- They make it easy for employees to give input and feedback to management
- They include employees in the planning and strategy development process

Shared Action Items

- There are opportunities within my job to engage in activities that help address social problems or support the local community
- The organization has a greater purpose that I understand and support
- The CEO speaks publicly about controversial social and political issues that I care about
- My values are reflected in the way the organization goes about its business
- I would have the opportunity to do work that will shape the future of society in some meaningful way
- If its employees objected, my employer would stop engaging in specific business practices or working with certain organizations

HOW DID WE MODEL THE RELATIONSHIP BETWEEN EMPLOYER PERFORANCE AND TRUST?

Respondents were asked:

Thinking about your current employer, to what extent do you **agree** with the following statements? Answers were given in reference to a 9-Point, Agree-Disagree scale.

Expectation fulfilment was calculated by assigning a score of 0-3 for each of the expectations dimensions (Job Opportunity, Personal Empowerment, and Shared Action) and then adding those scores up across the three dimensions. Thus, an employer's expectation fulfilment score could range from a total of 0 to 9.

Within a given dimension, if an employer's average score across the items was between 0 and 4.99, they were assigned a score of zero meaning that they fail to deliver on that dimension. If an employer's average score across the items was between 5.00 and 5.99, they were assigned a score of one meaning that they do not reliably deliver on that dimension. If an employer's average score across the items was between 6.00 and 7.49, they were assigned a score of two meaning that they deliver on that dimension. If an employer's score across the items was between 7.50 and 9.00, they were assigned a score of three meaning that they deliver strongly on that dimension.

The chart is based on calculating the average strong (top 2 box) and weak trust (3rd and 4th box) among employers who score 0 through 9 on expectation fulfilment.

Job Opportunity Items

- My employer makes sure that wages keep up with the cost of living over time
- My employer provides me with many opportunities to move up within the organization
- My job offers me interesting and valuable work experiences
- My employer offers training programs to help employees keep their skills up-to-date

Personal Empowerment Items

- My company makes it easy for me to give input to management
- The employees at all levels within the organization reflect the diversity of the customers and community we serve
- Management always tells employees the truth
- Management communicates regularly with employees about what is happening within the organization
- My organization includes employees in the planning and strategy development process
- My employer does not promote or reward people who do not live up to our organization's values, even if they perform well in other ways
- The CEO's actions embody the values of our organization

Shared Action Items

- My values are reflected in the way the organization goes about its business
- I understand and support my organization's greater purpose
- My employer offers me opportunities within my job to engage in activities that help address social problems or support the local community
- My organization's CEO speaks out publicly about controversial social and political issues that I care about
- I have the opportunity to do work that will shape the future of society in some meaningful way

HOW DID WE MEASURE THE ROI OF EMPLOYEE TRUST?

Four employee KPI dimensions were examined to determine the nature of the employer trust dividend:

1) Loyalty
2) Advocacy
3) Commitment
4) Engagement

Respondents were asked:

Thinking about your current employer, to what extent do you **agree** with the following statements? Answers were given in reference to a 9-Point, Agree-Disagree scale.

Loyalty items

- I want to stay working for this organization for many years
- I publicly support decisions taken by the organization's leadership

Advocacy items

- I would recommend our products or services to others
- I would defend the organization if I see or hear it being criticized
- I recommend this organization as an employer to others

Commitment items

- I want to do the best possible job for our customers or clients
- I am committed to helping the organization achieve its strategy and goals
- I feel motivated to perform at my best
- I do more than what's expected to help them succeed

Engagement items

- I behave in a way that epitomizes the organization's values
- I support the organization's social causes and community activities
- I offer suggestions for improving the organization's processes, products or services
- I would feel comfortable in speaking up if I were to see the organization engaging in wrong-doing
- I participate in the organization's social media activities
- I would feel comfortable pressuring management to weigh in on important social and political issues if I thought remaining silent would hurt the reputation of the organization
- I feel a sense of pride in my organization

HOW CAN ORGANIZATIONS MEASURE AND MANAGE THEIR TRUST?

Building on nearly two decades of experience in researching and analyzing trust, Edelman has developed a methodology for companies to measure, analyze and manage their trust capital. Edelman Trust Management (ETM) is a suite of flexible analytical tools and consulting services that help a business or organization better understand the extent to which it is trusted—and discover how it can best manage and build the trust of its audiences, stakeholders, and shareholders.

Grounded in 20 years of existing research in trust, ETM was devised and verified by a team of specialists across communications, business, and academia to link trust to real-life business outcomes. At the heart of ETM is our Edelman Net Trust Score (ENTS) and four dimensions of trust:

Overall Trust: “I trust this company to do what is right”
Ability: “This company is good at what it does”
Integrity: “This company is honest”
Dependability: “This company keeps its promises”
Purpose: “This company is trying hard to have a positive impact on society”

To learn more about Edelman Trust Management (ETM), please contact us at EdelmanTrustManagement@edelman.com

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