



Edelman Trust Barometer 2021



21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 countries*

33,000+ respondents

2021 Edelman Trust Barometer fieldwork
conducted from October 19 to November 18, 2020

**The 2021 Trust Barometer 27-market global averages (for the general population, mass population and informed public) do not include Nigeria*

27-market global data margin of error: General population +/- 0.6% (N=31,050); informed public +/- 1.3% (N=6,000); mass population +/- 0.6% (N=25,050+); half-sample global general online population +/- 0.8% (N=15,525).

Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).

U.S. Post-Election Supplement ethnicity-specific data margin of error: Non-Hispanic White +/- 3.3% (N=894); all others +/- 4.0 (N=607).

General Online Population

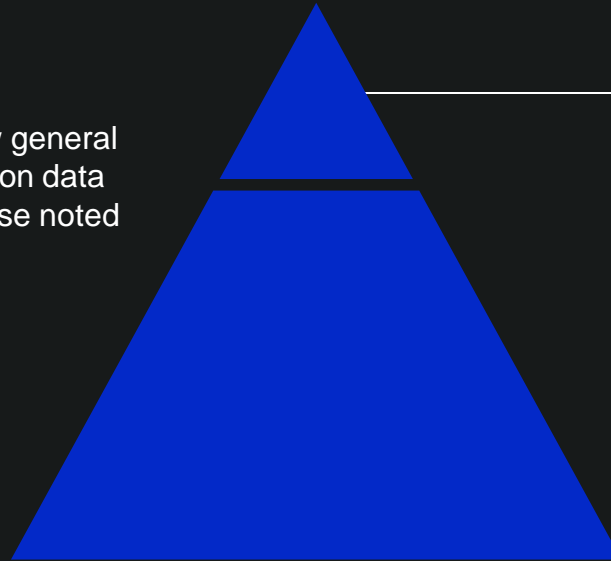
1,150

respondents per country

Ages

18+

All slides show general
online population data
unless otherwise noted



Informed Public

500 respondents in U.S. and China;
100 respondents in Nigeria;
200 in all other countries

Represents **17%** of total global population

Must meet 4 criteria:

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

Mass Population

All population not including
informed public

Represents **83%** of total global
population



U.S. Post-Election Supplement

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

21 YEARS OF TRUST

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummet	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	
Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	The Battle for Truth	Trust at Work	Trust: Competence and Ethics	Declaring Information Bankruptcy	

TRUST INDEX IN INDONESIA DECLINES BY 1 POINT

Trust Index



Greatest decline in China (-10);
greatest increase in Australia (+12)

16 countries gained trust,
9 countries lost trust

2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg.

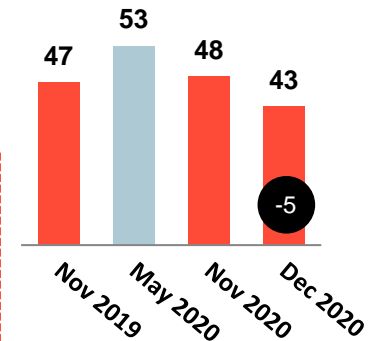
▲ 2020 General population

Rank	Country	Trust Index
54	Global 27	
82	China	
79	India	
73	Indonesia	
66	Thailand	
65	UAE	
62	Mexico	
62	Singapore	
61	Saudi Arabia	
60	Malaysia	
57	Kenya	
57	The Netherlands	
53	Canada	
53	Colombia	
51	Brazil	
50	S. Korea	
49	Argentina	
49	Italy	
47	Australia	
47	U.S.	
46	Germany	
45	France	
45	Ireland	
45	Spain	
44	S. Africa	
42	Japan	
42	UK	
30	Russia	

▲ 2021 General population | YtY Change

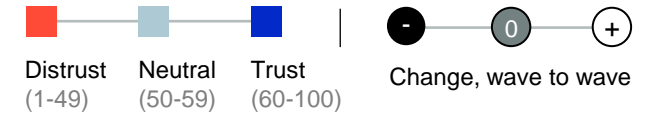
Rank	Country	Trust Index	YtY Change
56	Global 27		+2
77	India		-2
72	China		-10
72	Indonesia		-1
69	Saudi Arabia		+8
68	Singapore		+6
67	UAE		+2
66	Malaysia		+6
63	The Netherlands		+6
61	Thailand		-5
59	Australia		+12
59	Kenya		+2
59	Mexico		-3
56	Canada		+3
53	Germany		+7
52	Italy		+3
51	Brazil		0
50	Ireland		+5
48	Colombia		-5
48	France		+3
48	S. Africa		+4
48	U.S.		+1
47	Argentina		-2
47	S. Korea		-3
45	Spain		0
45	UK		+3
40	Japan		-2
31	Russia		+1

U.S. Trust Index

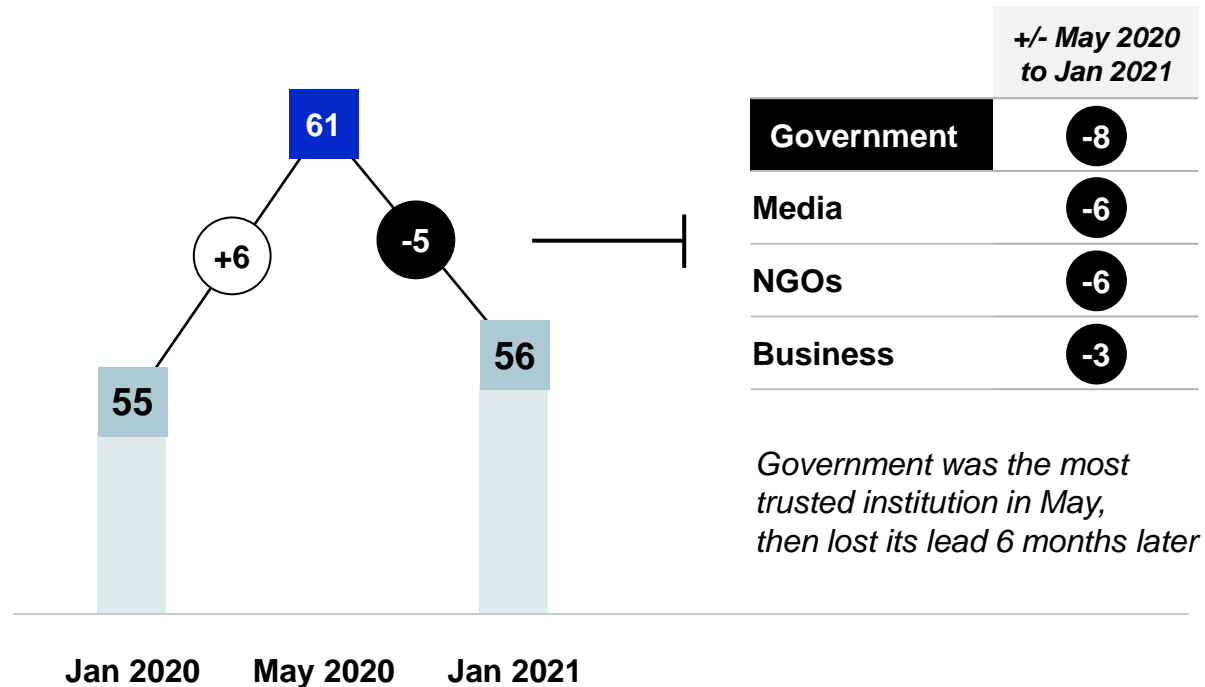


SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT IN 11 COUNTRIES

Trust Index, 11 countries included in the 2020 Trust Barometer Spring Update



Global 11



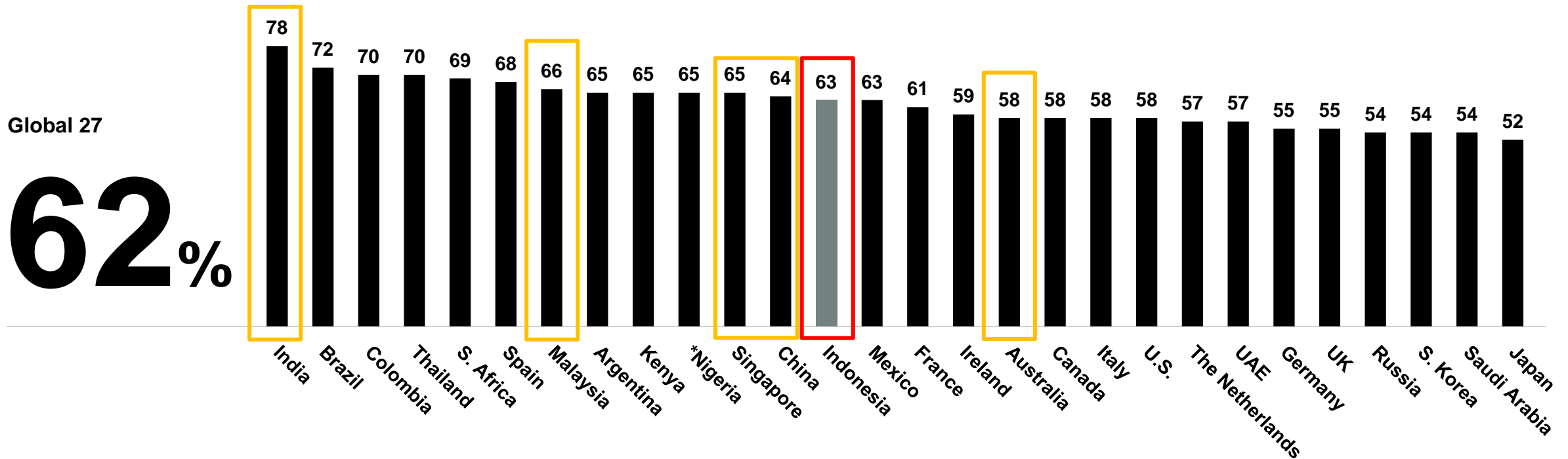
Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

PANDEMIC DEEPENS INEQUITIES AROUND THE WORLD

Percent who agree

Those with **less education, less money and fewer resources are being unfairly burdened** with most of the suffering, risk of illness, and need to sacrifice due to the pandemic



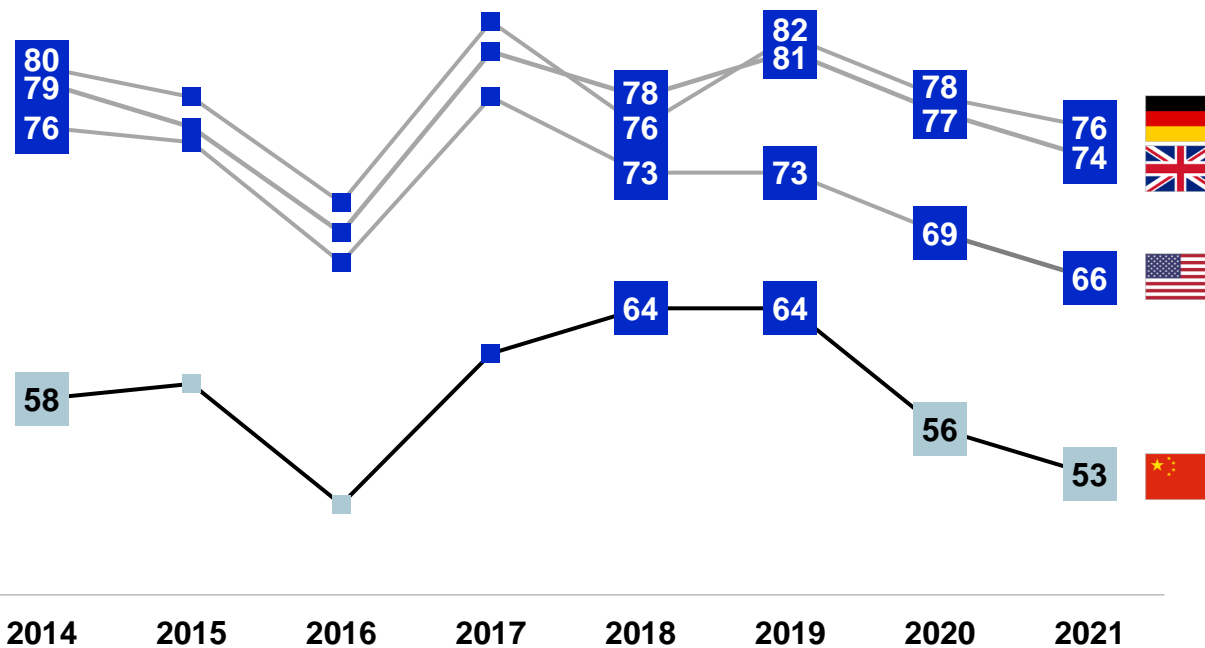
2021 Edelman Trust Barometer. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

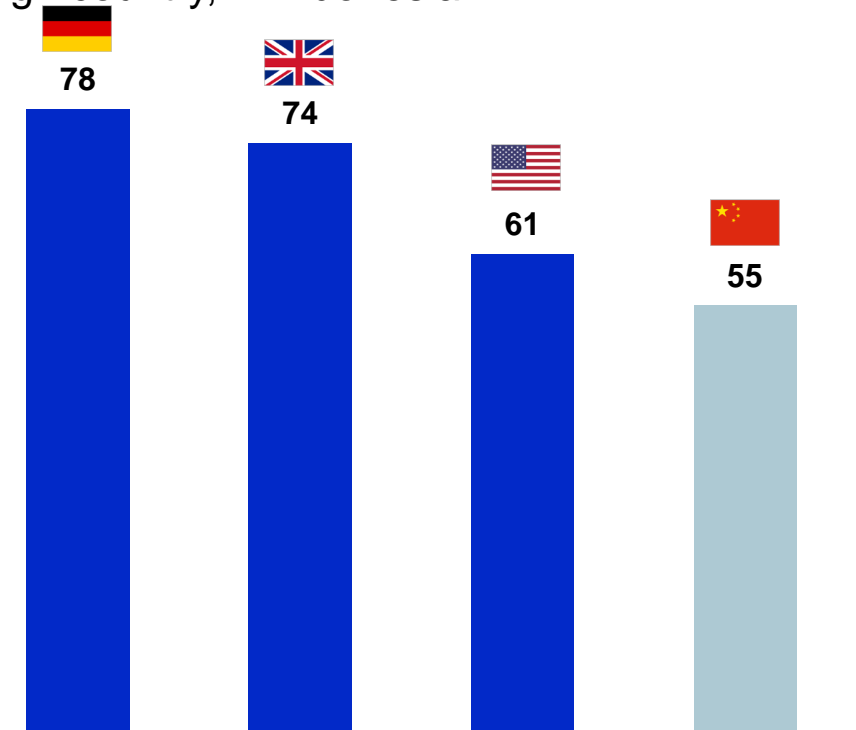
AMONG RESPONDENTS IN INDONESIA, TRUST IN POWERFUL COUNTRIES DECLINES

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

Percent trust in **companies** headquartered in each country, in Indonesia



Percent trust in the **national government** of each foreign country, in Indonesia



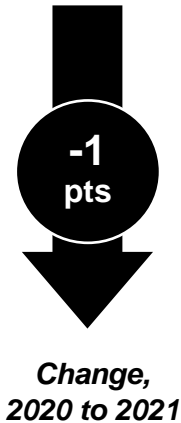
2021 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. TRU_GOV. Please indicate how much you trust the national government of each of the following countries to do what is right using a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of half of the sample. Respondents were not asked to rate their home country. General population, Indonesia.

A YEAR IN FLASHBACK



IN INDONESIA, ALL INSTITUTIONS TRUSTED

Percent trust, in Indonesia



Business

78

-1

Media

72

+3

Government

70

-5

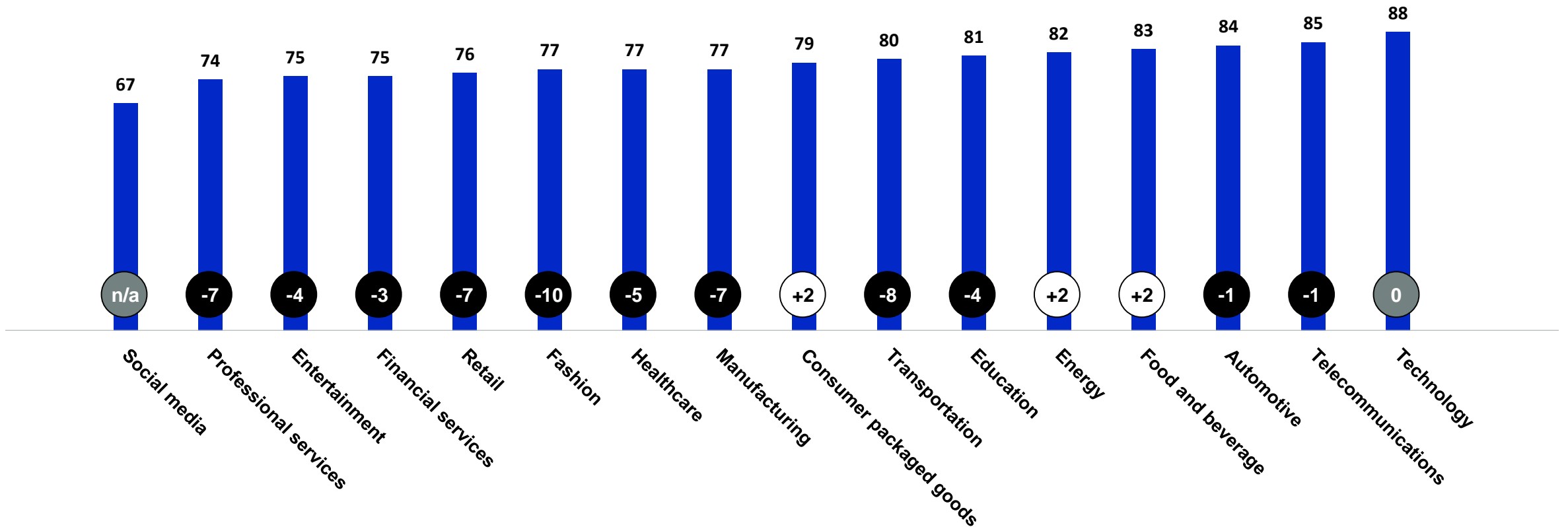
NGOs

68

0

TRUST DECREASES IN 11 of 15 SECTORS

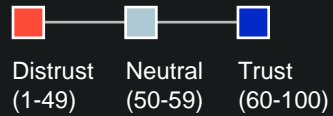
Percent trust in each sector, in Indonesia



2021 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, Indonesia.

TRUST INEQUALITY SPREADS FURTHER

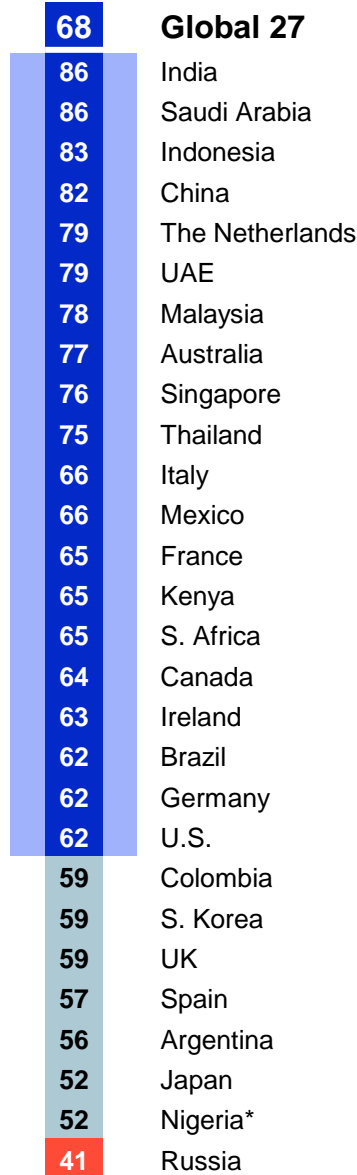
Trust Index



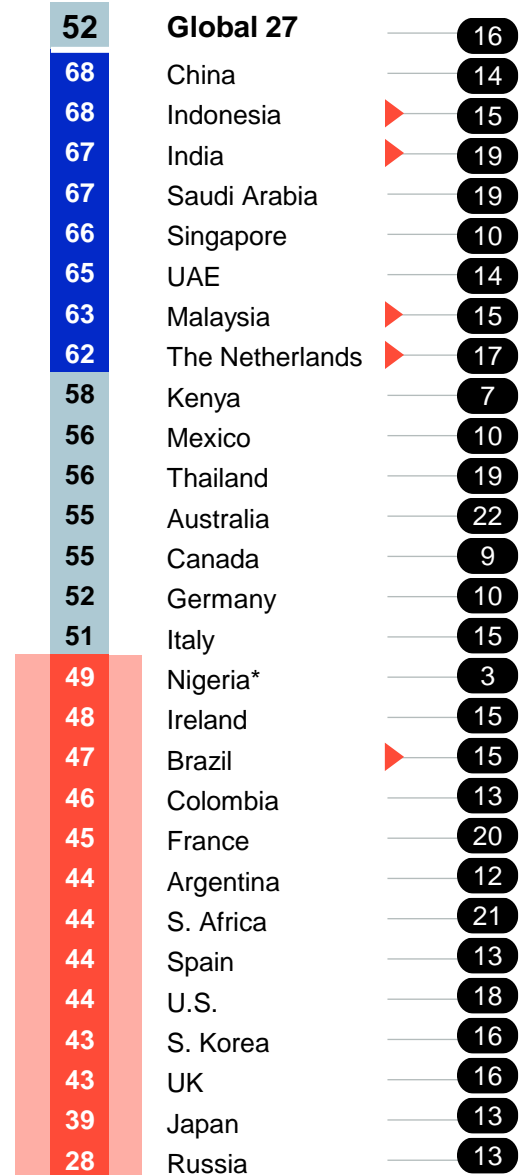
Mass population 16 points less trusting

2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, 27-mkt avg. *Nigeria not included in the global average

2021 Informed public



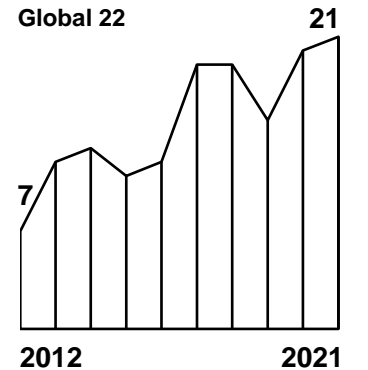
2021 Mass population | Trust gap



Record trust inequality

DOUBLE-DIGIT TRUST INEQUALITY IN RECORD NUMBER OF COUNTRIES

Nr. of countries with double-digit trust inequality





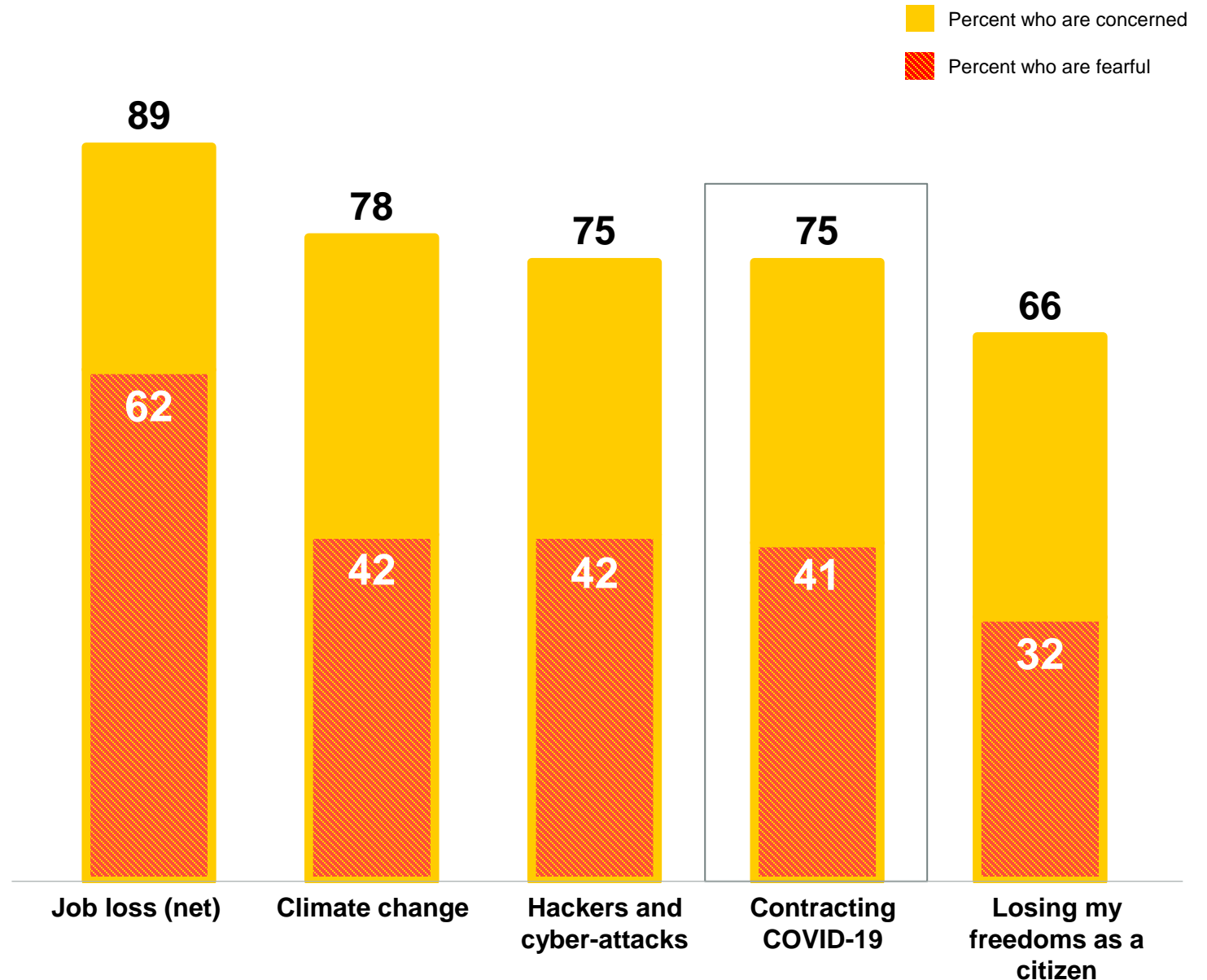
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PANDEMIC PUTS TRUST TO THE TEST

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PANDEMIC ADDED TO PERSISTENT PERSONAL AND SOCIETAL FEARS

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



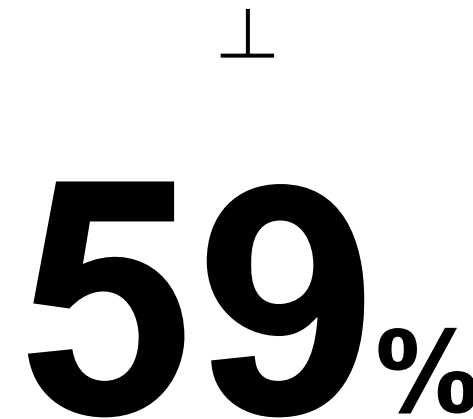
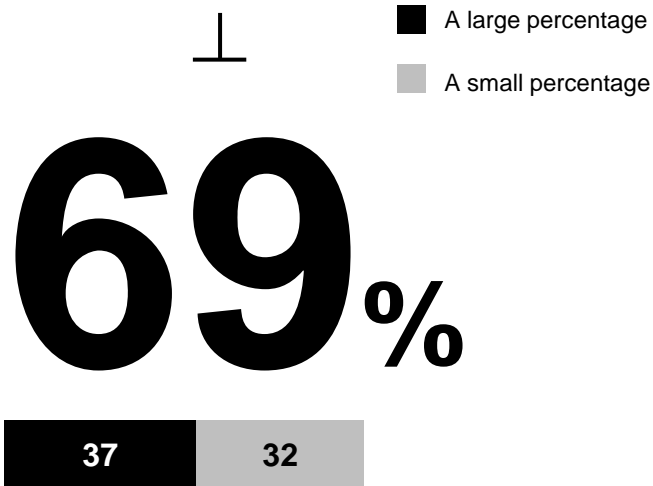
2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes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

PANDEMIC ACCELERATES JOB LOSS FEARS

Percent who agree, in Indonesia

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

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



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

INCREASED URGENCY TO ADDRESS FOUNDATIONAL PROBLEMS

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

2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. General population, Indonesia. Net change is the difference between more and less important.

<i>Change in importance since last year, in Indonesia</i>	Net change	More Important	Less Important
Improving our healthcare system	+72	78	6
Addressing poverty in this country	+70	76	6
Improving our education system	+69	75	6
Closing the economic and social divide	+66	73	7
Addressing climate change	+62	68	6
Finding ways to combat fake news	+61	70	9
Protecting people's individual freedoms	+61	68	7
Addressing discrimination, racism	+60	68	8

The background is a dark, grainy photograph of a protest. A large, semi-transparent watermark '2021' is overlaid on the right side. In the background, a banner with the text 'WAKAS' and 'COVID-19' is visible. The main title is in white, bold, sans-serif font.

RAGING INFODEMIC FEEDS MISTRUST

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SOCIETAL LEADERS SUSPECTED OF MISINFORMATION

Percent who worry, in Indonesia

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



59%

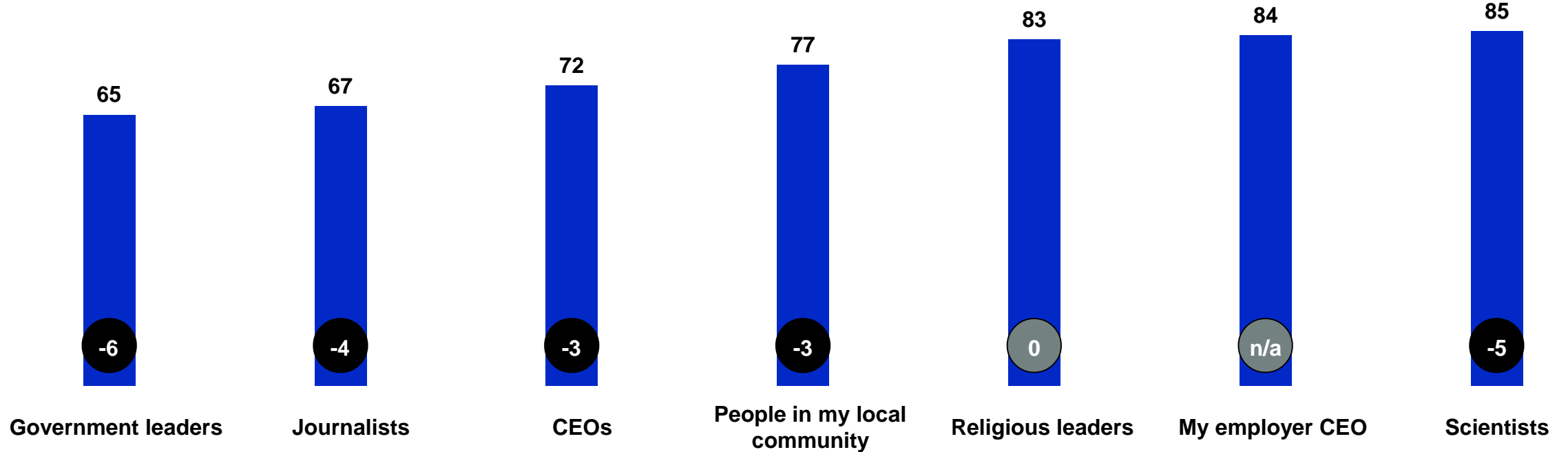
Business leaders
are **purposely trying to mislead**
people by saying things they know are false
or gross exaggerations



58%

TRUST IN SOCIETAL LEADERS TO DO WHAT IS RIGHT DECLINES

Percent trust, in Indonesia

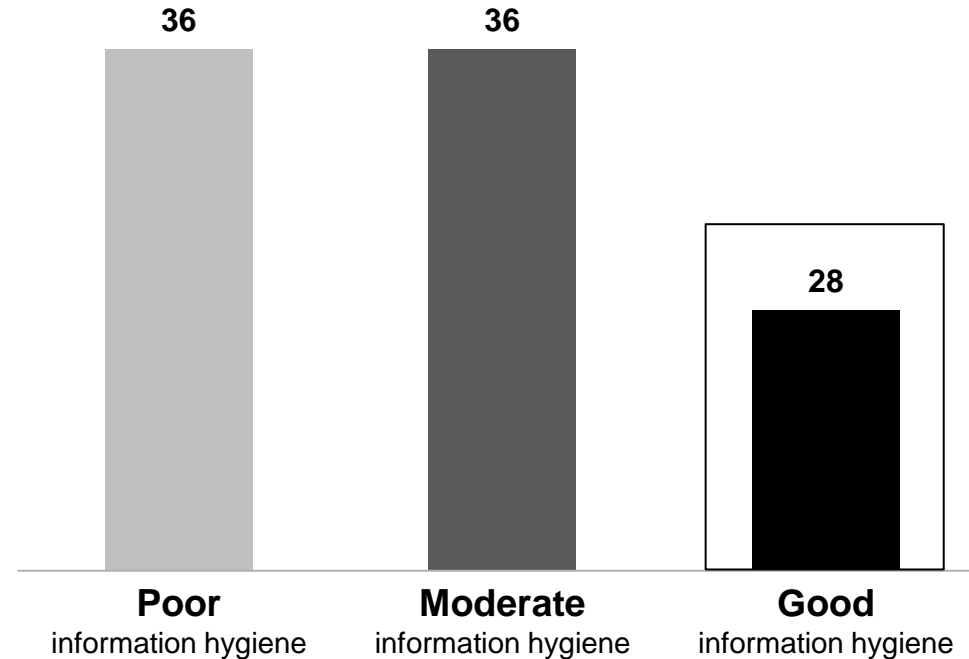


IN INDONESIA, ONLY 1 IN 4 HAVE GOOD INFORMATION HYGIENE

Percent in each segment

Information hygiene:

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

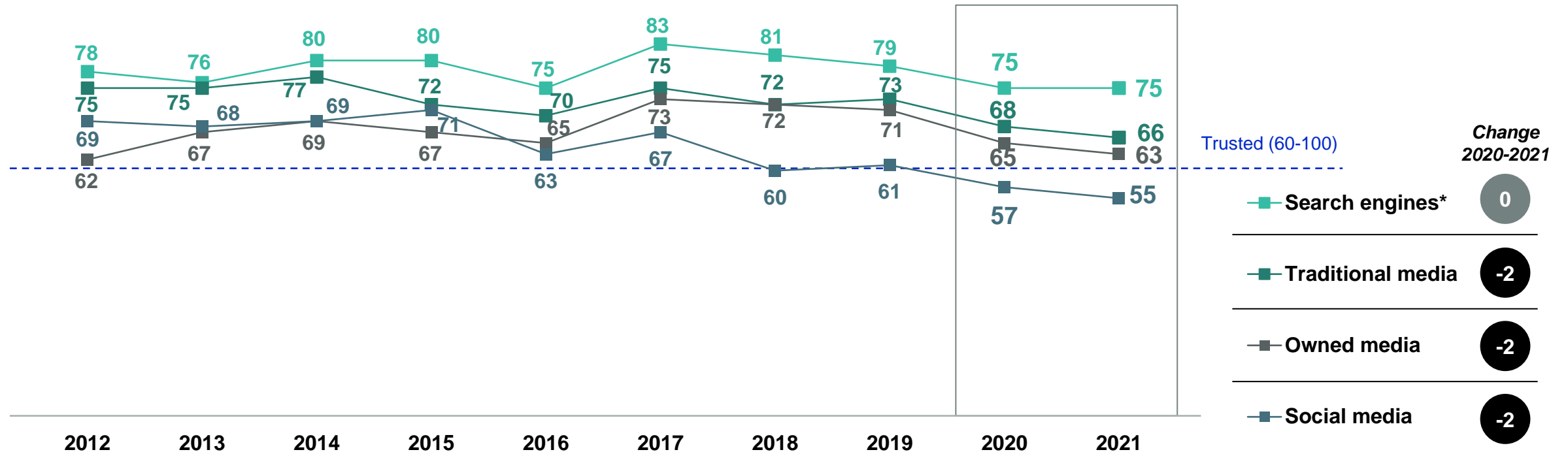


60% of respondents **share or forward news items** that they find to be interesting.

Of those, **only 32%** have good information hygiene

TRUST IN SOCIAL MEDIA AT AN ALL TIME LOW

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



2021 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Indonesia.

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



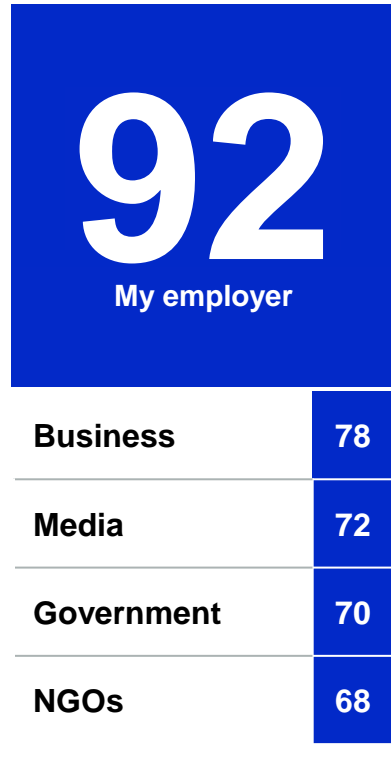
⊥
**A NEW MANDATE
FOR BUSINESS**
⊥

TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

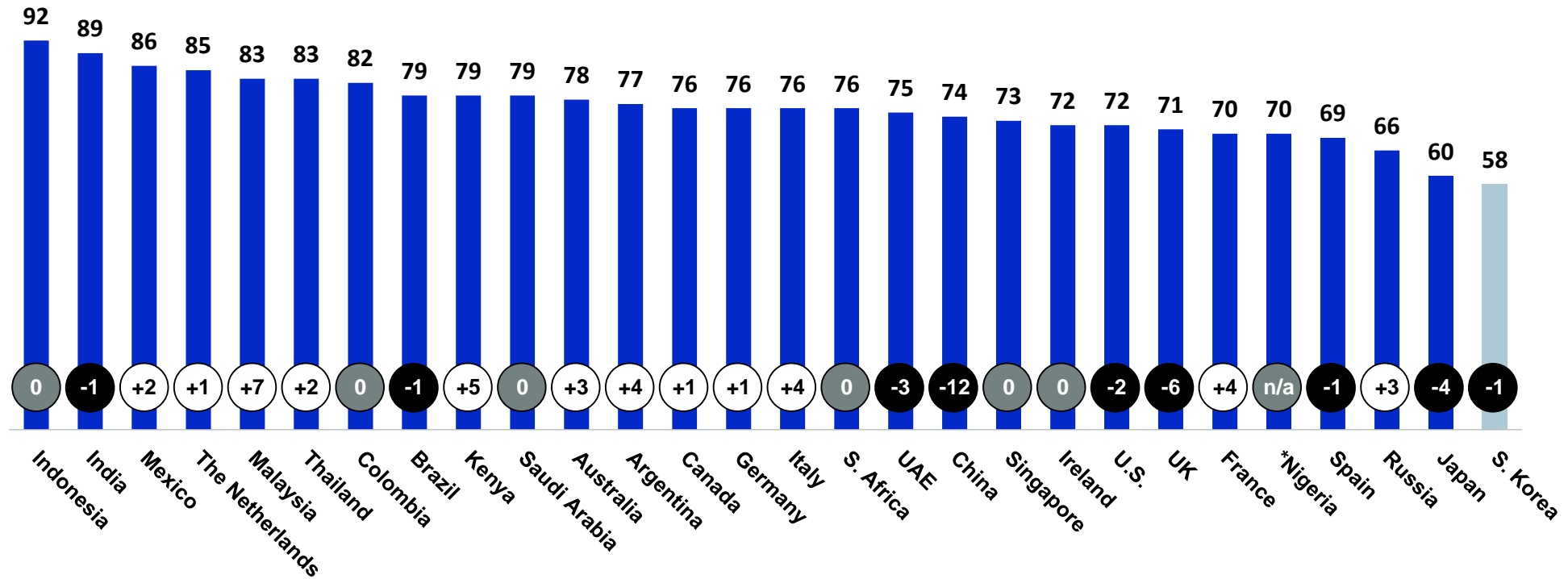
Percent trust in my employer



Indonesia



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



BUSINESS EXPECTED TO TAKE THE LEAD ON CHANGE

Percent who agree, in Indonesia

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

⊥
72%

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

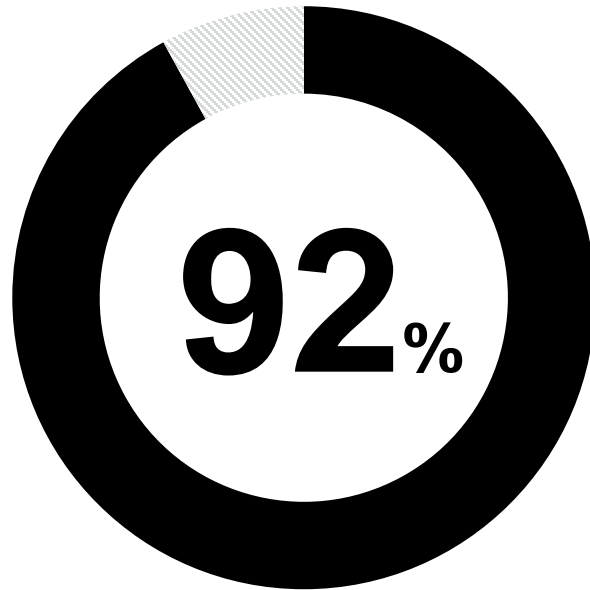
⊥
74%

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

⊥
72%

CEOS MUST LEAD ON SOCIETAL ISSUES

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



Pandemic impact	68
Job automation	54
Societal issues	54
Local community issues	45

CONSUMERS AND EMPLOYEES EXPECTED TO HAVE A SEAT AT THE TABLE

Percent who agree, in Indonesia

67%

Consumers ...

**have the power to force
corporations to change**

66%

Employees ...

51% of those who
are employed

I am more likely now than a year
ago to voice my objections to
management or **engage in
workplace protest**

EMPLOYEE EXPECTATIONS SHIFT: SAFETY AND UPSKILLING MATTER MORE

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

2021 Edelman Trust Barometer. EMP_IMP_VAL. When considering an organization as a potential place of employment, please indicate whether each of the following has become more important to you, less important to you, or has stayed the same in importance since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. Question asked of those who are an employee (Q43/1). General population, Indonesia. Net change is the difference between more and less important.

<i>Change in importance as an employer attribute since the start of the year in Indonesia...</i>	Net change	More Important	Less Important
Job skills training programs	+57	66	9
Regular employee communications	+57	65	8
Diverse, representative workforce	+56	64	8
Keep workers, customers safe	+55	63	8

PANDEMIC FEARS IMPEDE RETURN TO WORKPLACE

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

50% choosing **to work at home**,
for the following reasons:

50% choosing to **return to the office**,
for the following reasons:

COVID-19 risk while commuting/in office (net)  75

My employer made me feel safe  35

I am more productive  22

I am more productive  51

Enhanced work-life balance  27

Healthy work-life balance  31

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

EMERGING FROM INFORMATION BANKRUPTCY

1

Business: Embrace expanded mandate

CEOs must lead on issues from improving healthcare and address inequality to upskilling. Act first, talk after.

2

Lead with facts, act with empathy

Societal leaders must have the courage to provide straight talk, but also empathize and address people's fears.

3

Provide trustworthy content

All institutions must provide truthful, unbiased, reliable information.

4

Don't go it alone

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