



Edelman Trust Barometer 2022

2022 EDELMAN TRUST BAROMETER

Methodology

27-market global data margin of error: General population +/- 0.6% (n=31,050); half-sample global general online population +/- 0.8% (n=15,525).
Country-specific data margin of error: General population +/- 2.9% (n=1,150); half-sample +/- 4.1% (n=575).

Annual online survey in its 22nd year

Fieldwork conducted: Nov 1 – Nov 24, 2021

28

countries

36,000+

respondents

1,150+

respondents/country

GLOBAL AVERAGES vary based on the number of countries surveyed each year:

GLOBAL 27 does not include Nigeria*

GLOBAL 22 does not include Colombia, Kenya, Nigeria, Saudi Arabia, S. Africa and Thailand

GLOBAL 24 Not asked in China, Russia, Thailand

the sensitive nature of the question prevented this data from being collected in these markets

Other global averages detailed in technical appendix

**To prevent skewing the global results, Nigeria is not included in any global averages because the online population is not representative of the true population*

Argentina
Australia
Brazil
Canada
China
Colombia
France
Germany
India
Indonesia
Ireland
Italy
Japan
Kenya
Malaysia
Mexico
Nigeria
Russia
Saudi Arabia
Singapore
S. Africa
S. Korea
Spain
Thailand
The Netherlands
UAE
UK
U.S.

22 YEARS OF TRUST

'01	'02	'03	'04	'05	'06	'07	'08	'09	'10	'11
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 Plummets	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
'12	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22
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	Business Most Trusted	The Cycle of Distrust



TRUST DOWN UNDER

I WAS HOPING TO LIVE A COOLER DEATH

is climate change a cork?

WE WOULD BE IN RISK IF THE POLITICIANS WERE DOING THEIR JOB

STOP CLIMATE CHANGE OR WE'LL FIRE YOU

DENIAL IS SUICIDE

I'm Sir Dinosaur. I thought they'd kill me. Not!

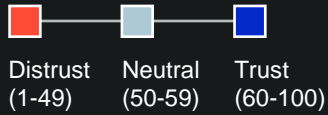
There IS NO Planet B
Let's change for climate sake!

ITS OUR FUTURE

THE CLIMATE IS CHANGING WHY AREN'T WE?

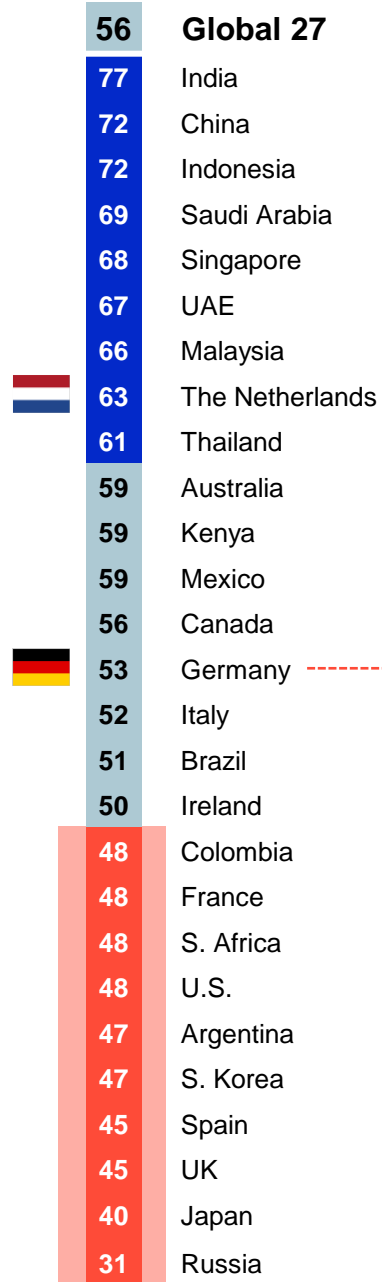
AUSTRALIA AMONG THE BIGGEST LOSERS

Trust Index

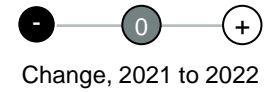
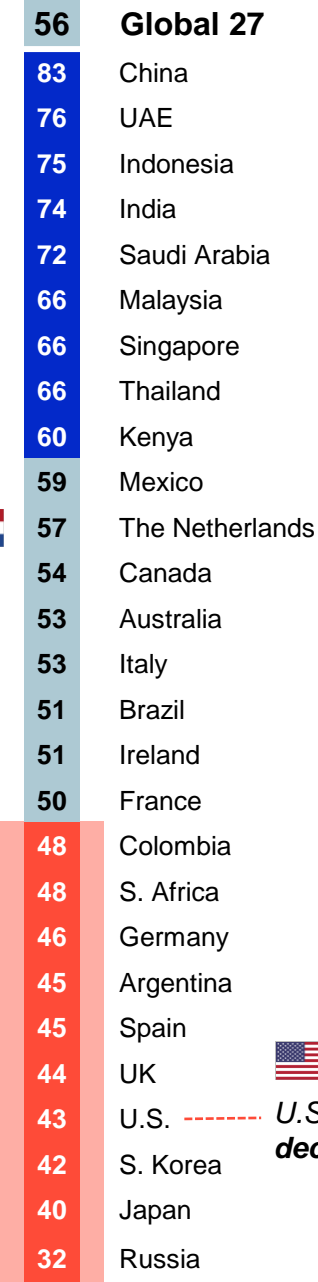


2022 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg.

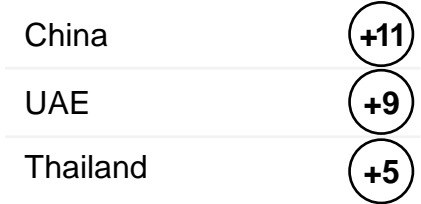
2021 General population



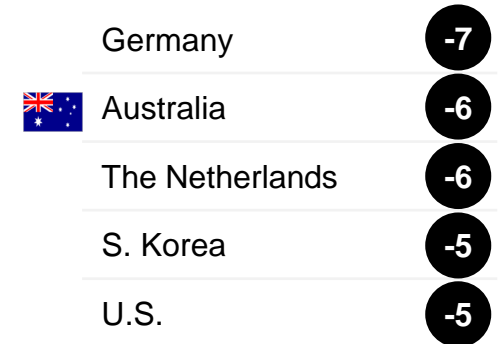
2022 General population



Biggest gainers:



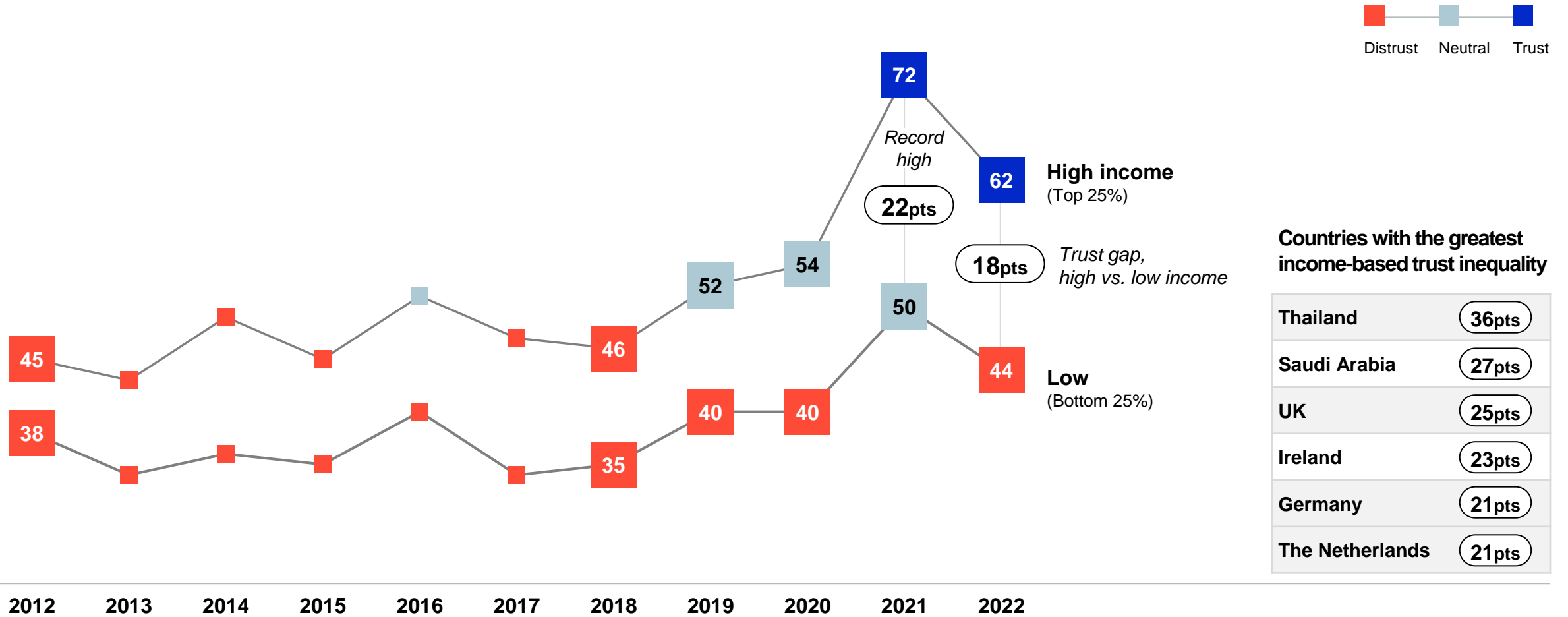
Biggest losers:



U.S. Trust Index has declined 10 pts since 2017

CONTINUED TRUST INEQUALITY IN AUSTRALIA

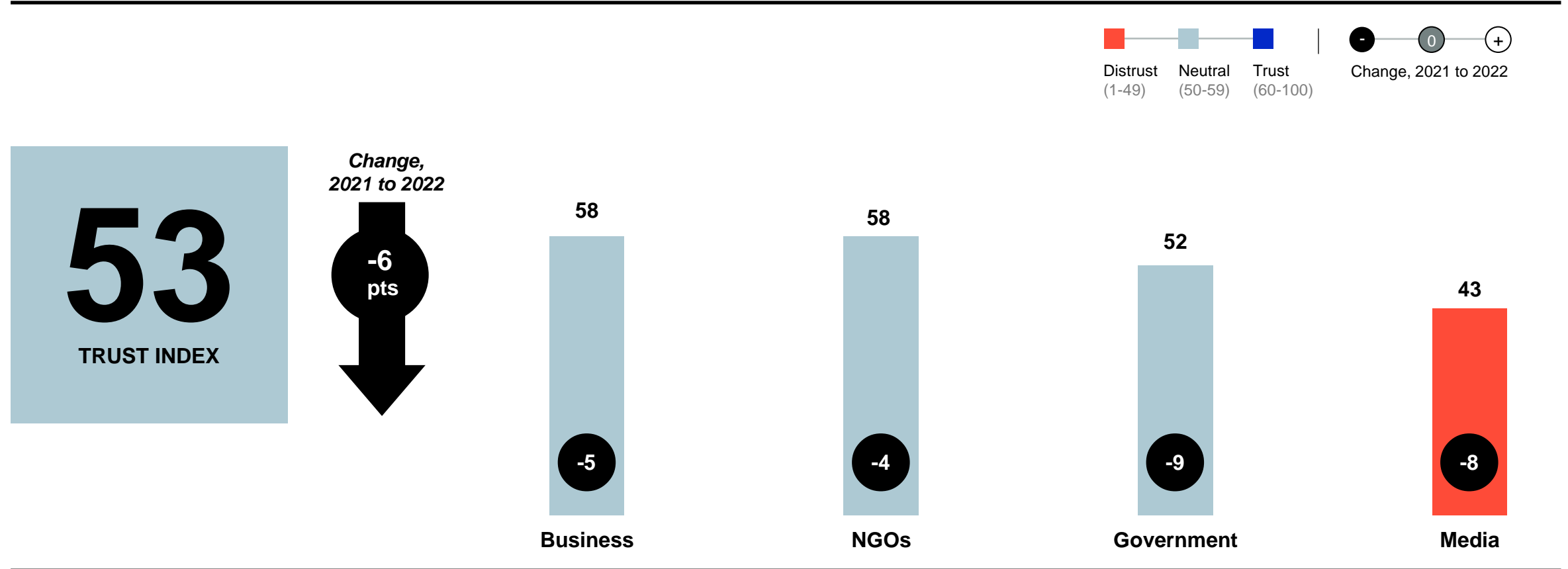
Trust Index in Australia



2022 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, Australia, by income.

TRUST DECLINES FOR ALL INSTITUTIONS; NO INSTITUTION TRUSTED IN AUSTRALIA

Percent trust, in Australia

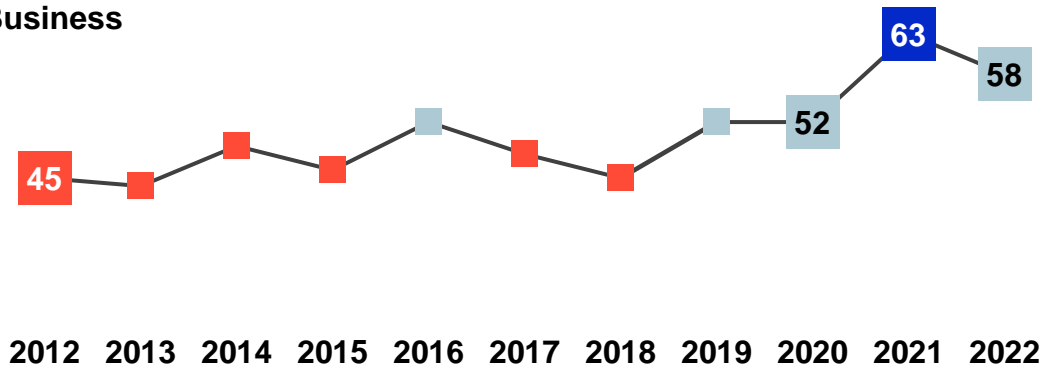


AUSTRALIA'S TRUST BUBBLE HAS BURST

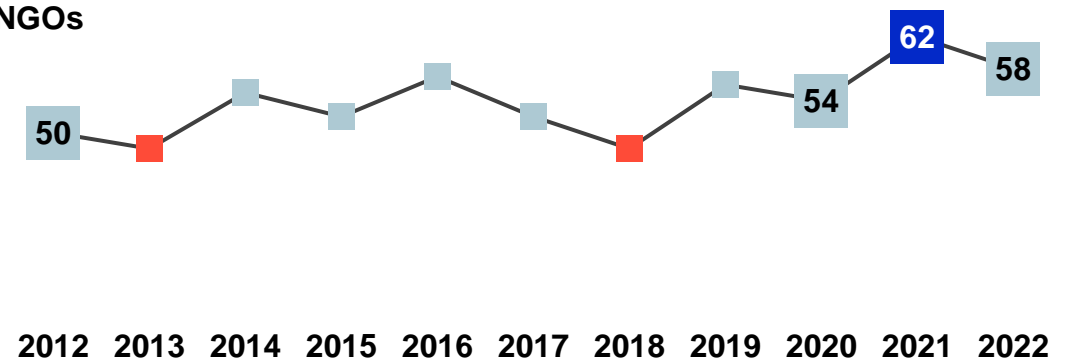
Per cent trust, in Australia

■ — ■ — ■
 Distrust Neutral Trust

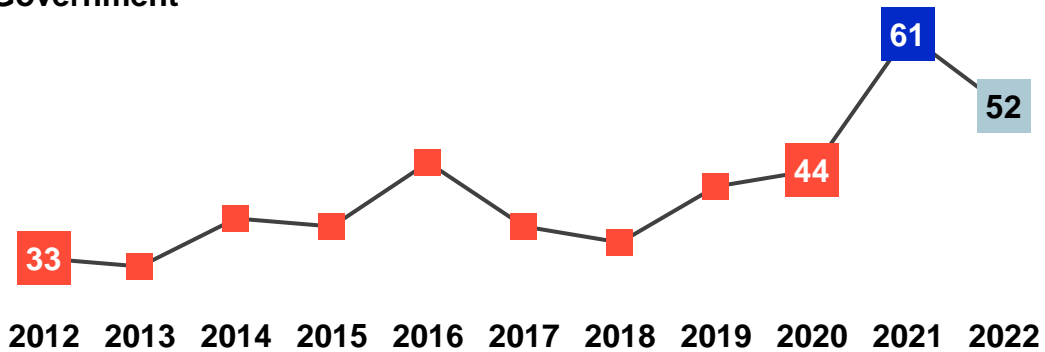
Business



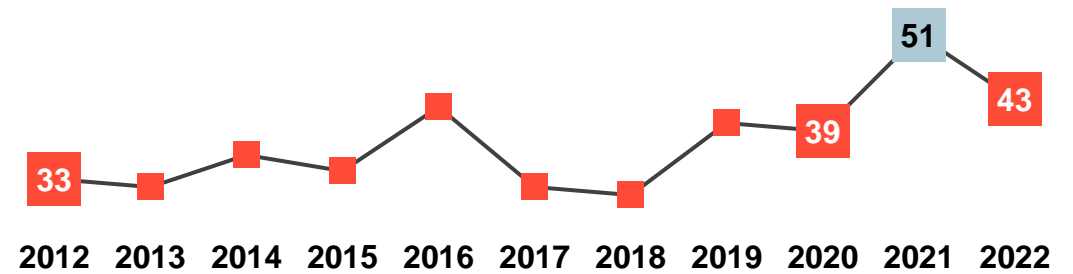
NGOs



Government



Media

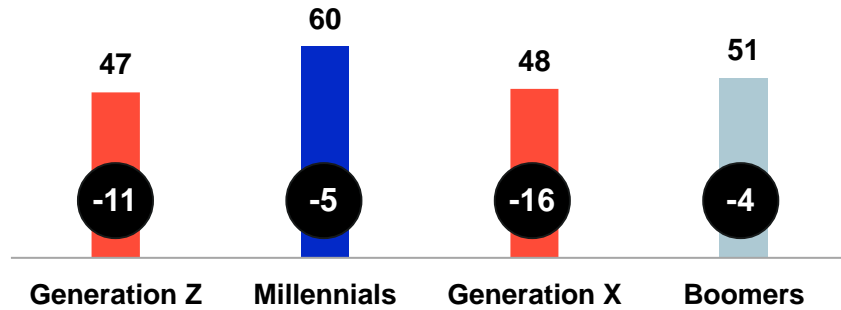


MILLENNIALS MOST TRUSTING GENERATION; GEN Z LEAST TRUSTING

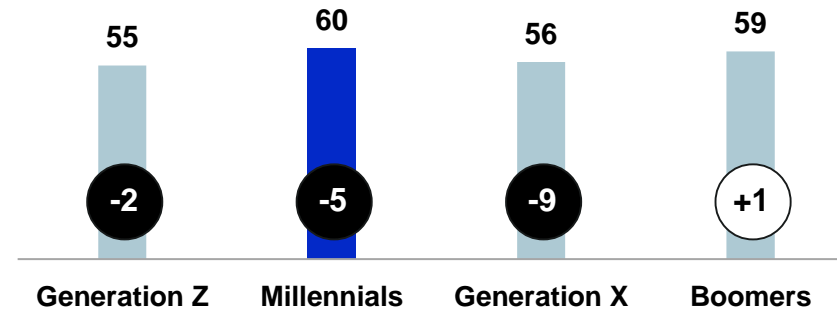
Per cent trust



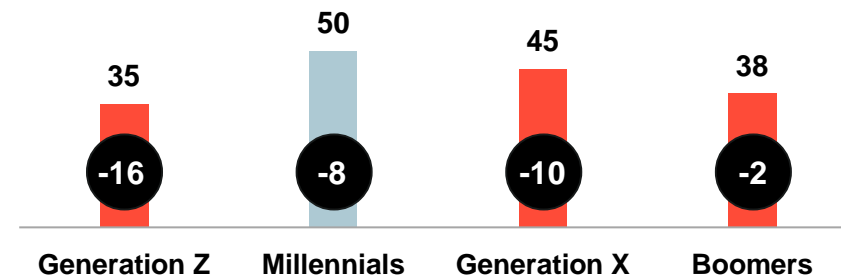
Government



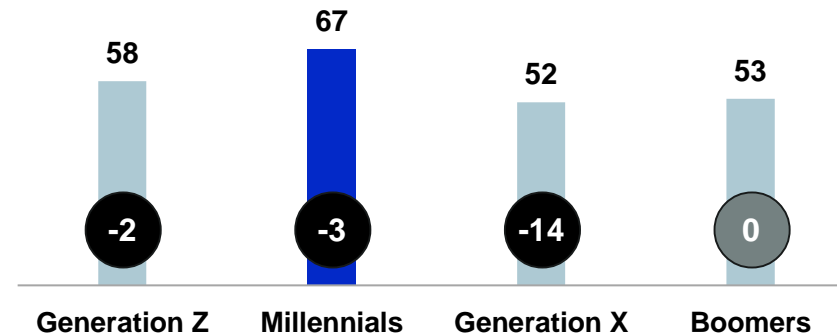
Business



Media

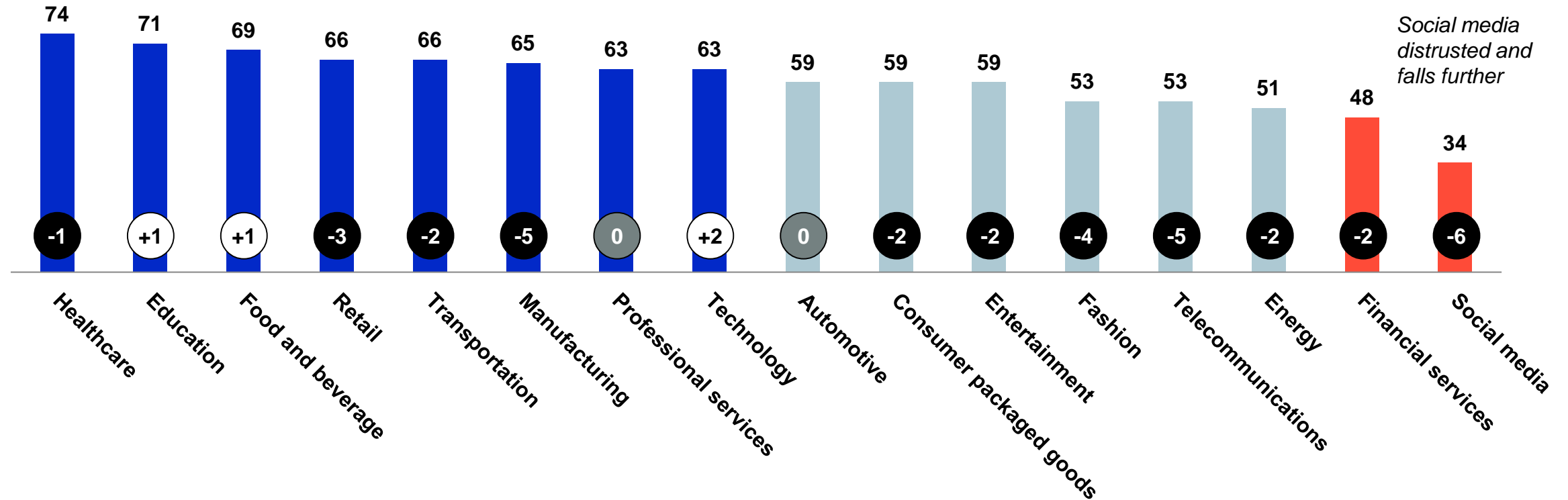
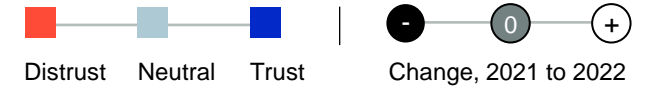


NGOs



TRUST IN MOST INDUSTRY SECTORS DECLINE

Per cent trust, in Australia



MY EMPLOYER REMAINS A BASTION OF TRUST

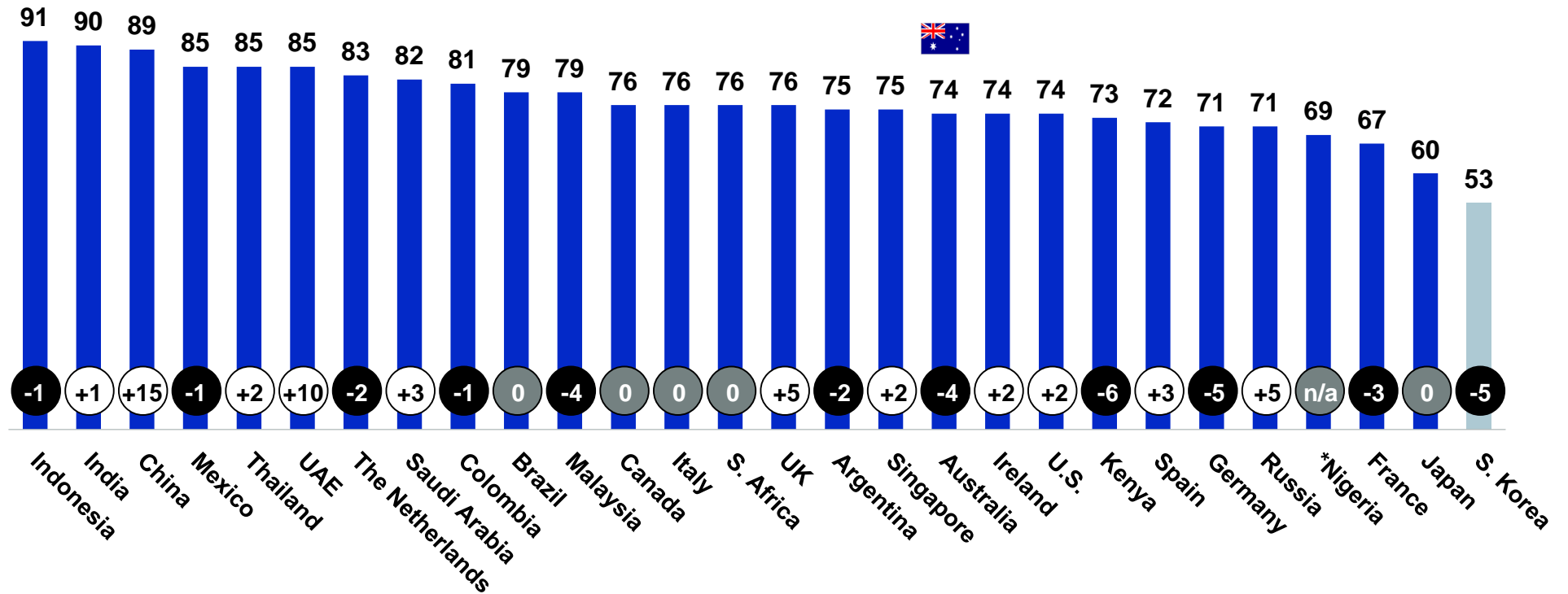
Per cent trust



Australia



Business	58
NGOs	58
Government	52
Media	43



2022 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. 9-point scale; top 4 box, trust. General population, by market. "Your employer" only shown to those who are an employee of an organization (Q43/1). *Nigeria is not included in the global average.



A CYCLE OF DISTRUST

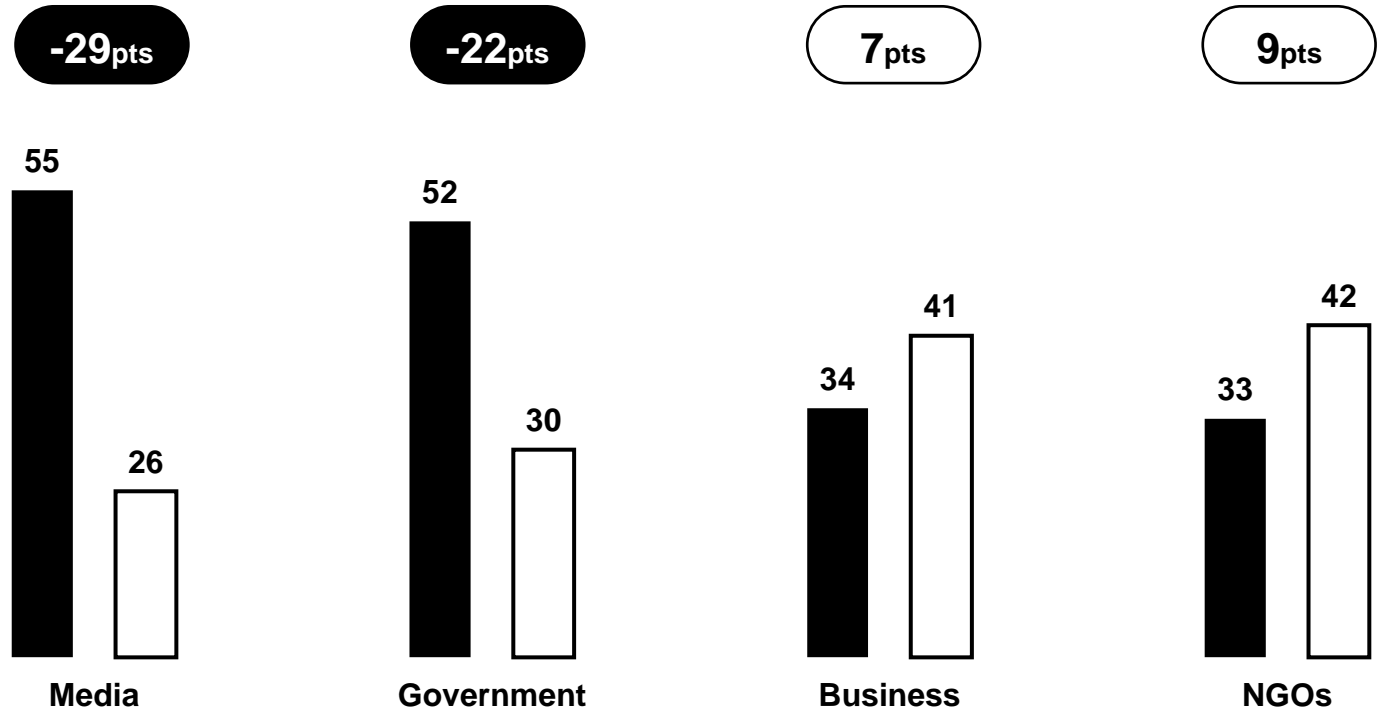
GOVERNMENT AND MEDIA SEEN AS DIVISIVE

Per cent who say, in Australia

These institutions are...

■ a **dividing** force in society
□ a **unifying** force in society

Gap,
difference between
unifying force vs.
dividing force



GOVERNMENT NOT SEEN AS ABLE TO SOLVE SOCIETAL PROBLEMS

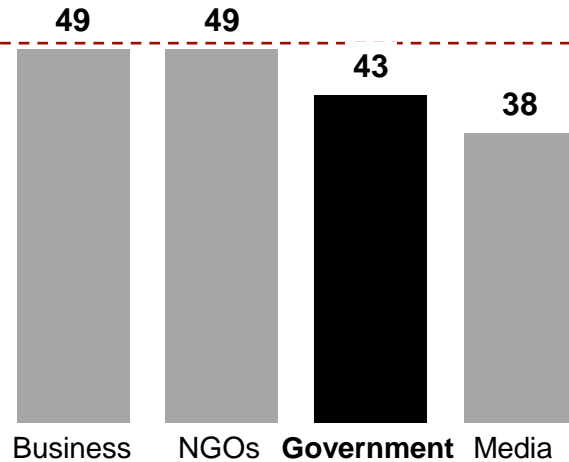
Per cent who say each is a strength of institutions, in Australia

Take a leadership role

Coordinate cross-institutional efforts to solve societal problems

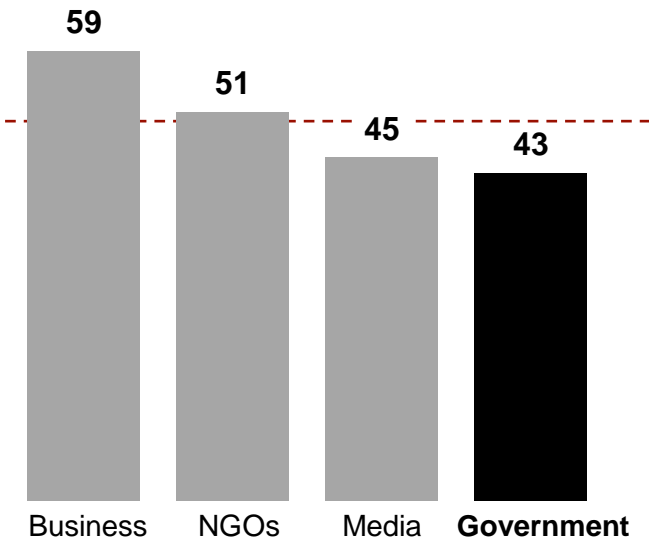
Majority do not see as strength

50%



Get results

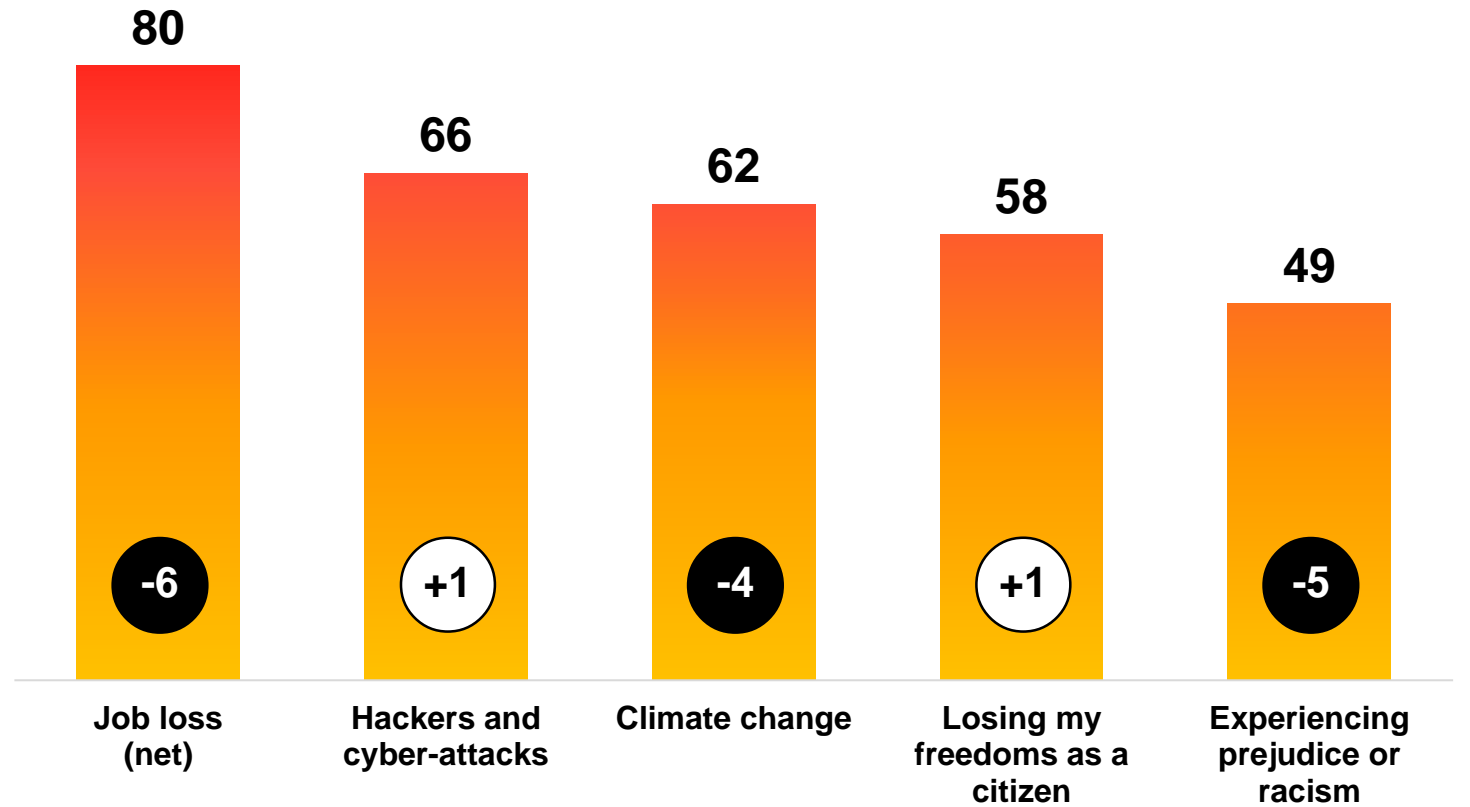
Successfully execute plans and strategies that yield results



PERSISTENT SOCIETAL FEARS IN AUSTRALIA

Per cent who worry about each, in Australia

● — 0 — ●
Change, 2021 to 2022



2022 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. Non-job loss attributes shown to half of the sample. General population, Australia. Job loss asked of those who are an employee of an organization (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.



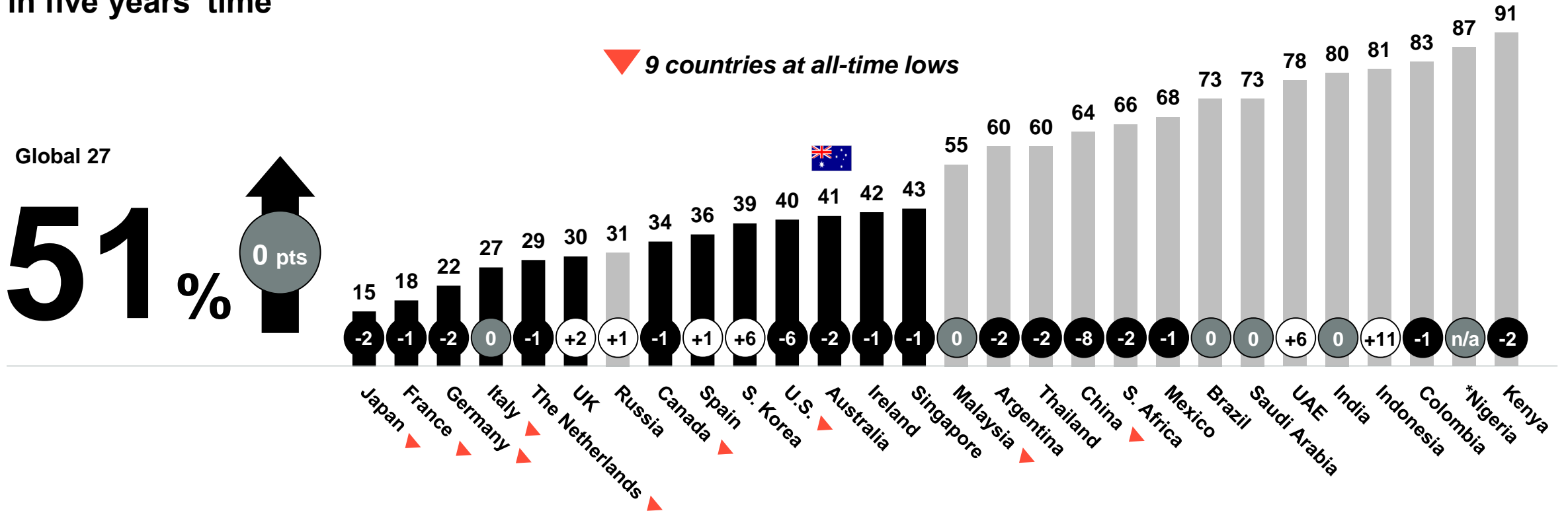
DECLINING ECONOMIC OPTIMISM IN AUSTRALIA

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

■ Developed countries

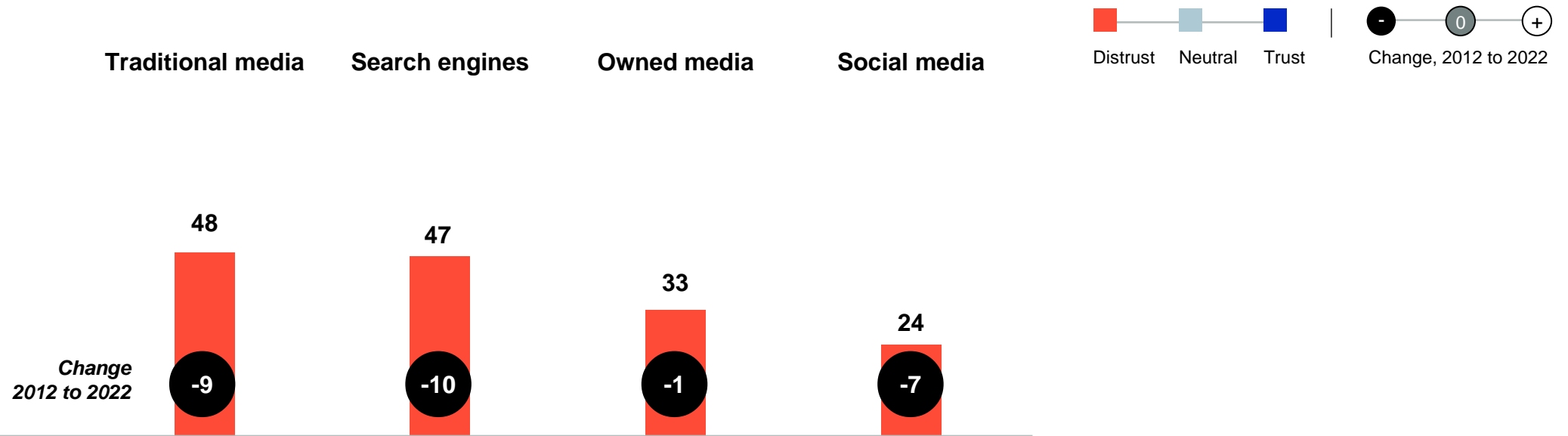
● 0 ● + Change, 2021 to 2022

My family and I will be better off
in five years' time



NEWS SOURCES FAIL TO FIX THEIR TRUST PROBLEM

Per cent trust, in Australia



Least-trusting countries for each source

U.S.	45	Russia	35	S. Korea	24	France	19
Japan	47	Japan	39	Russia	28	Germany	20
Australia	48	S. Korea, U.S.	43	U.S.	28	Canada	21

2022 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, Australia.

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

FAKE NEWS CONCERNS AT ALL-TIME HIGHS

Per cent who agree

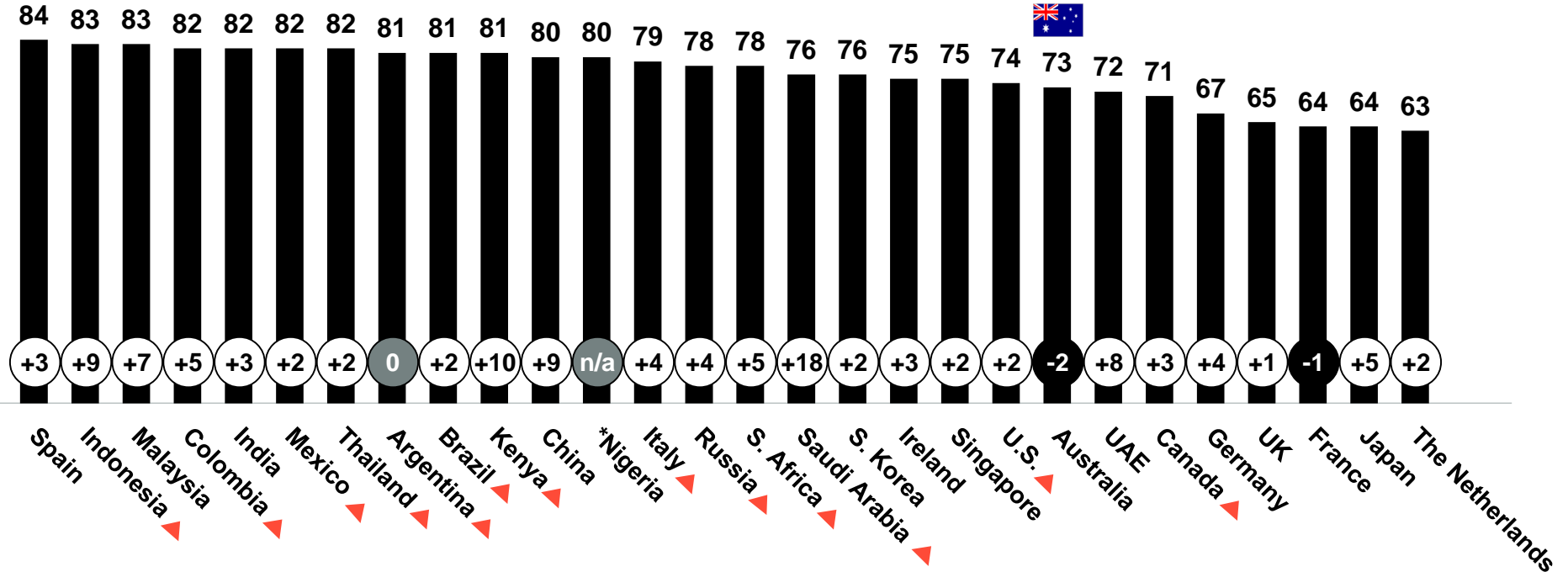


Change, 2021 to 2022

▲ All-time high in 13 of 27 countries

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

Global 27

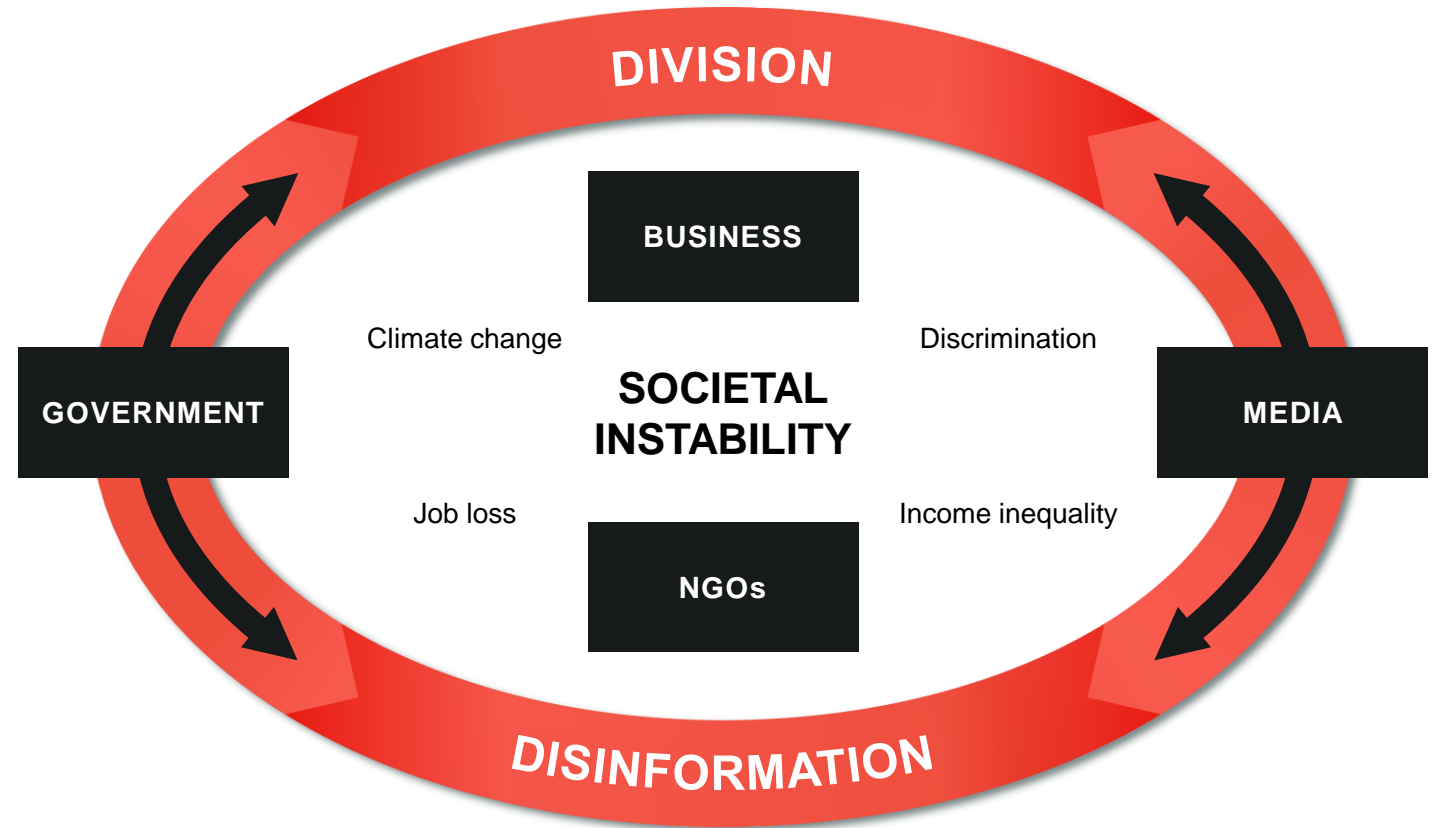


2022 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 27-mkt avg. *Nigeria is not included in the global average

CYCLE OF DISTRUST THREATENS SOCIETAL STABILITY

Government and media feed cycle of division and disinformation for votes and clicks

NGOs and business pressured to take on societal problems beyond their abilities



A black and white photograph of a protest. In the foreground, several people are holding up signs that read "BETRAYED BY MY GOVERNMENT". The signs are held high, and the protesters are looking in various directions. The background shows trees and a building. The overall mood is one of anger and dissatisfaction.

DISTRUST BECOMES THE DEFAULT

BETRAYED
BY MY
GOVERNMENT

BETRAYED
BY MY
GOVERNMENT

BETRAYED
BY MY
GOVERNMENT

BETRAYED

Crime of the
century
Failure to act
on climate

BETRAYED

RA
ROU

GO

CONVINCED WE'RE BEING LIED TO BY SOCIETAL LEADERS

Per cent who worry, in Australia

Change, 2021 to 2022



Journalists and reporters



Business leaders



My country's government leaders

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



DISTRUST IS THE DEFAULT: NO BASIS FOR PEACEFUL DEBATE

Which are you more likely to believe?

55%

My tendency is to distrust until I see evidence that something is trustworthy

VS.

My tendency is to trust until I see evidence that something is untrustworthy

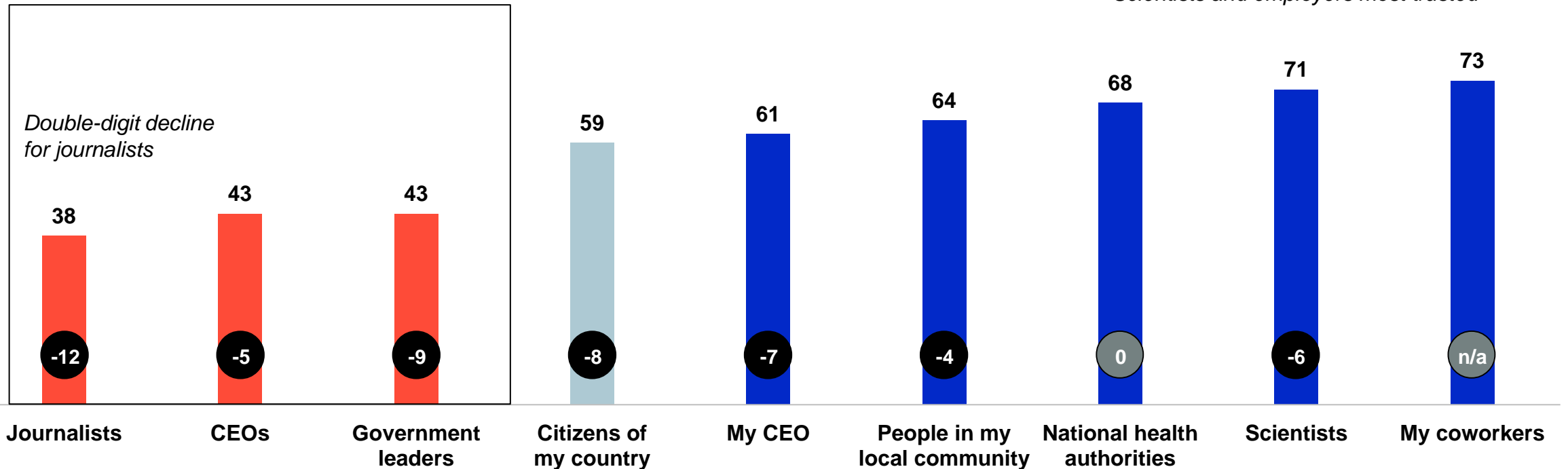
Per cent who agree

People in this country **lack the ability to have constructive and civil debates** about issues they disagree on

61%

TRUST BECOMES PERSONAL

Per cent trust, in Australia



2022 Edelman Trust Barometer. 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 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. Some attributes asked of half the sample. General population, Australia. “My coworkers” and “my CEO” only shown to those who are an employee of an organization (Q43/1).



SOCIETAL LEADERSHIP NOW A CORE BUSINESS FUNCTION

ALL STAKEHOLDERS HOLD BUSINESS ACCOUNTABLE

Per cent who agree

In Australia

56%

**Buy or advocate
for brands**
based on their beliefs
and values

57%

**Choose a place
to work**
based on their beliefs
and values

64%

Invest
based on their
beliefs and values

Global 7

Source: 2021 Edelman Trust Barometer
Special Report: Institutional Investors

88%

of institutional investors
subject ESG to the same scrutiny
as operational and financial
considerations

CEOS EXPECTED TO BE THE FACE OF CHANGE

Per cent who say

CEOs should be personally visible

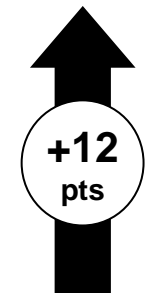
when discussing public policy with external stakeholders or work their company has done to benefit society

80%
(net)

When considering a job, I expect the CEO to speak publicly about **controversial social and political issues that I care about**

Among employees

60%



Change,
2019 to 2022

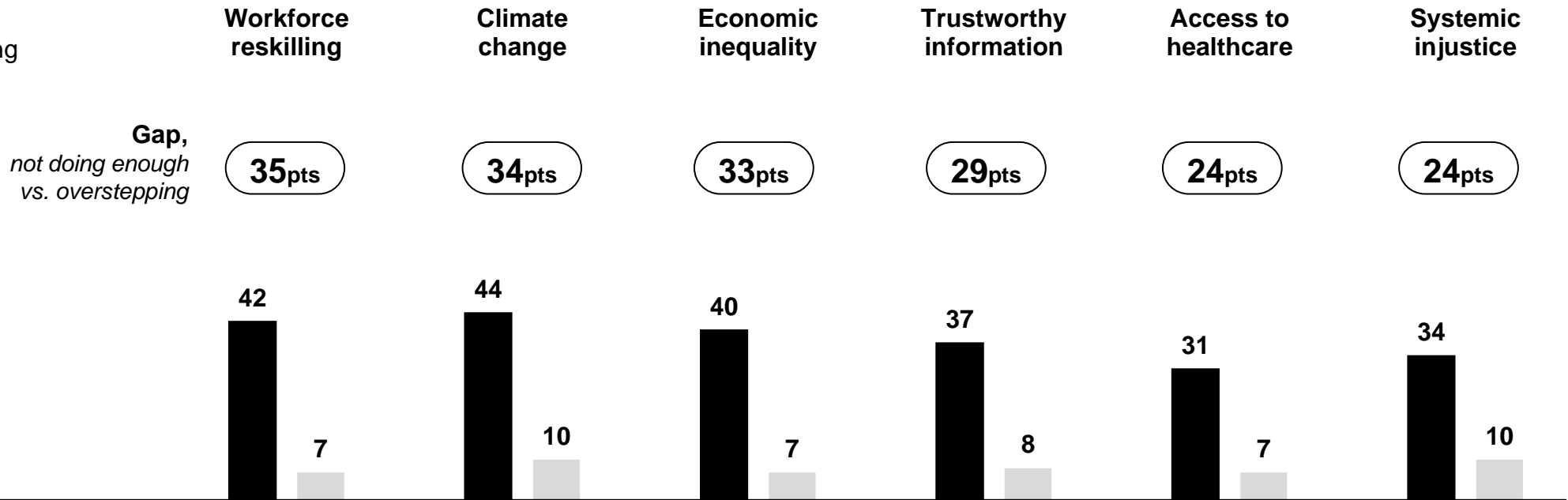
2022 Edelman Trust Barometer. CEO_VIS. How visible do you think a CEO should personally be in these different types of business situations? 9-point scale; top 4 box, visible. Question asked of half of the sample. Data shown is a net of attributes 2 and 10. EMP_IMP. When considering an organization as 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; top 2 box, important. Question asked of those who are an employee of an organization (Q43/1). General population, Australia.

WANT MORE, NOT LESS, BUSINESS ENGAGEMENT ON SOCIETAL ISSUES

Per cent who say, in Australia

On addressing each **societal issue**,
business is...

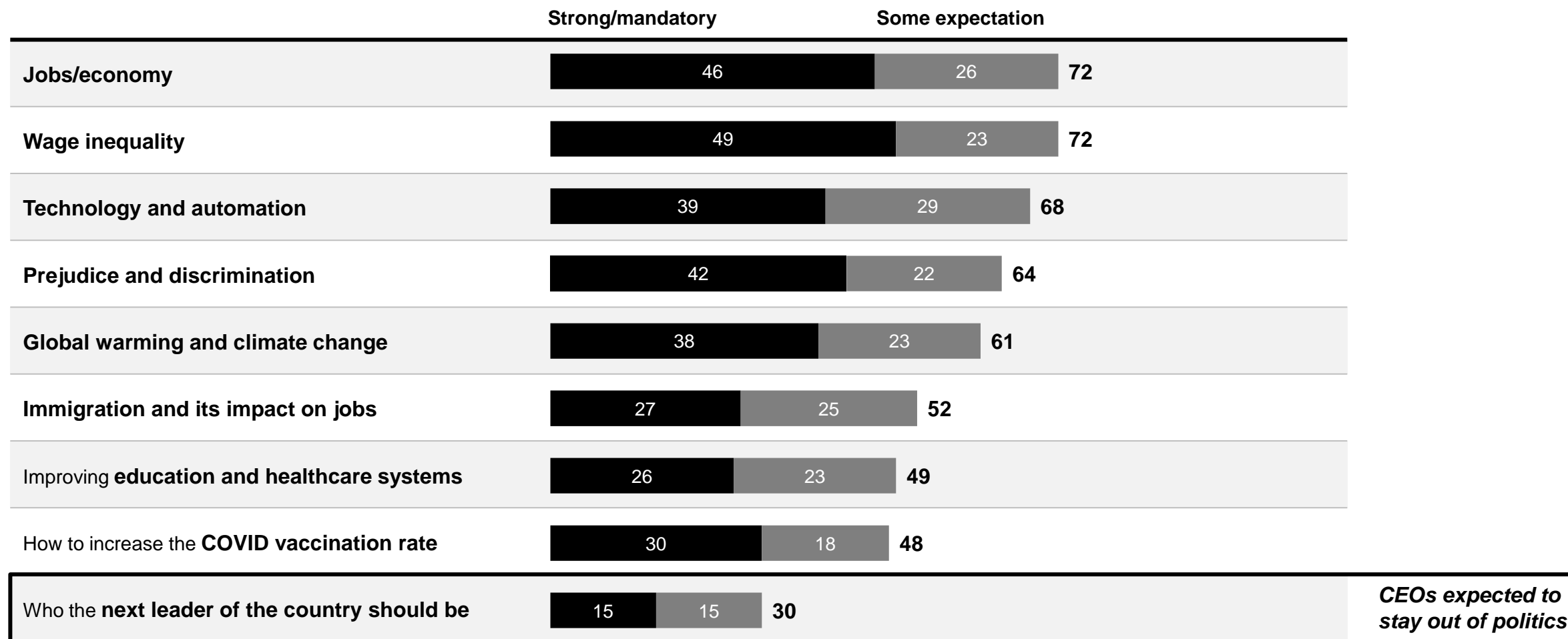
■ — □
not doing enough overstepping



2022 Edelman Trust Barometer. BUS_BND. Think about business as an institution, and its current level of engagement in addressing societal needs and issues. When it comes to each of the following areas, please indicate if you think business is going too far and overstepping what it should be doing, is doing just the right amount in regard to this activity, or is not going far enough in its actions and should be doing more. 3-point scale; code 3, "not doing enough"; code 1, "overstepping". General population, Australia.

CEOS EXPECTED TO INFORM POLICY, NOT POLITICS

Per cent who expect CEOs to **inform and shape conversations and policy debates** about each issue, in Australia



2022 Edelman Trust Barometer. CEO_RSP. For each of the following topics, please indicate to what degree corporate CEOs should be held responsible for directly helping to inform and shape ongoing conversations and policy debates. 5-point scale; codes 4-5, strong/mandatory; code 3, some expectation. Question asked of half the sample. General population, Australia. "Improving education and healthcare" is an average of attributes 9 and 10. "Jobs/economy" is an average of attributes 11 and 12.

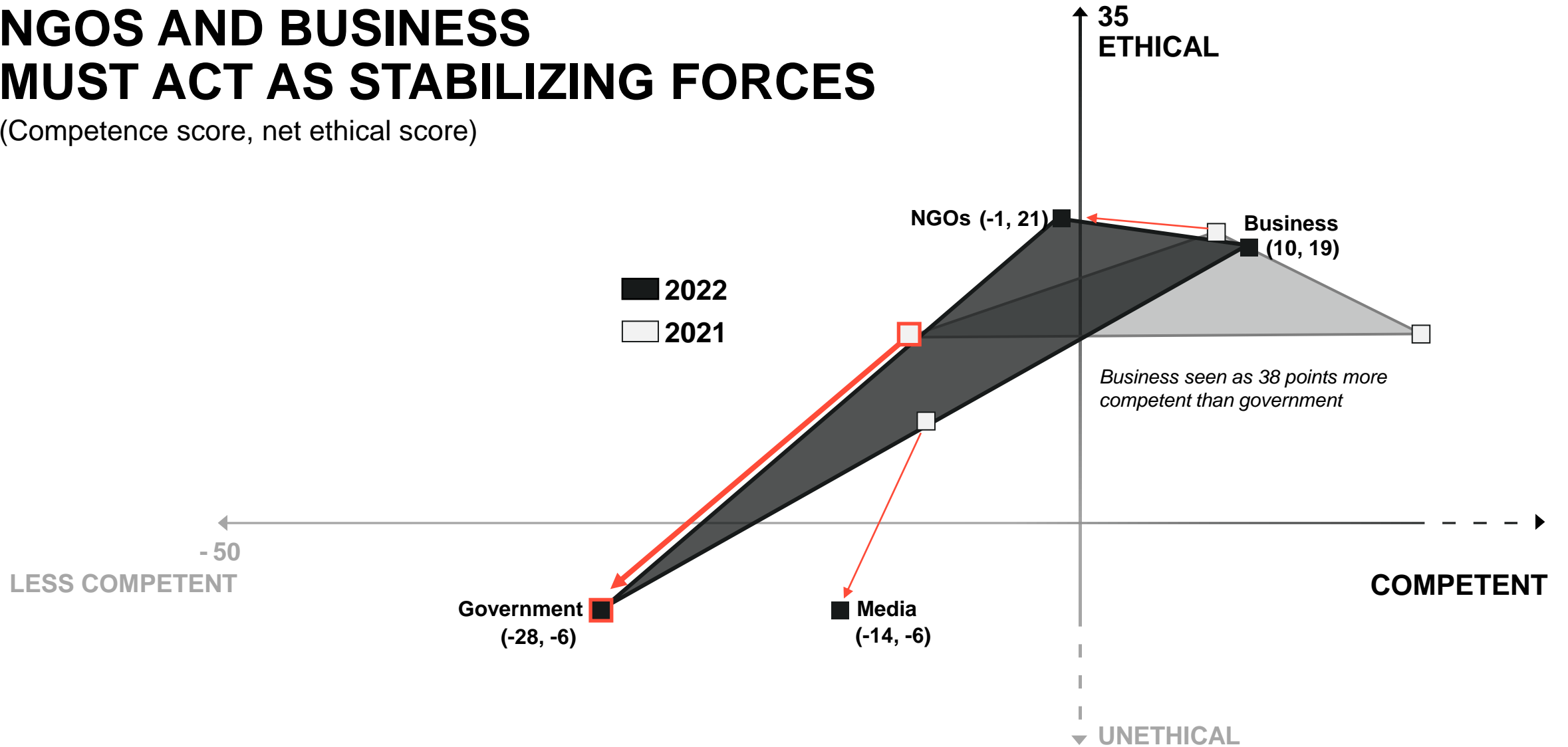




BREAKING THE CYCLE OF DISTRUST

NGOS AND BUSINESS MUST ACT AS STABILIZING FORCES

(Competence score, net ethical score)



2022 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]_PER_DIM/1-4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INS]/1. Depending on the question it was either asked of the full of half the sample. General population, Australia. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

GOOD INFORMATION CAN HELP CLOSE THE SOCIETAL DIVIDE

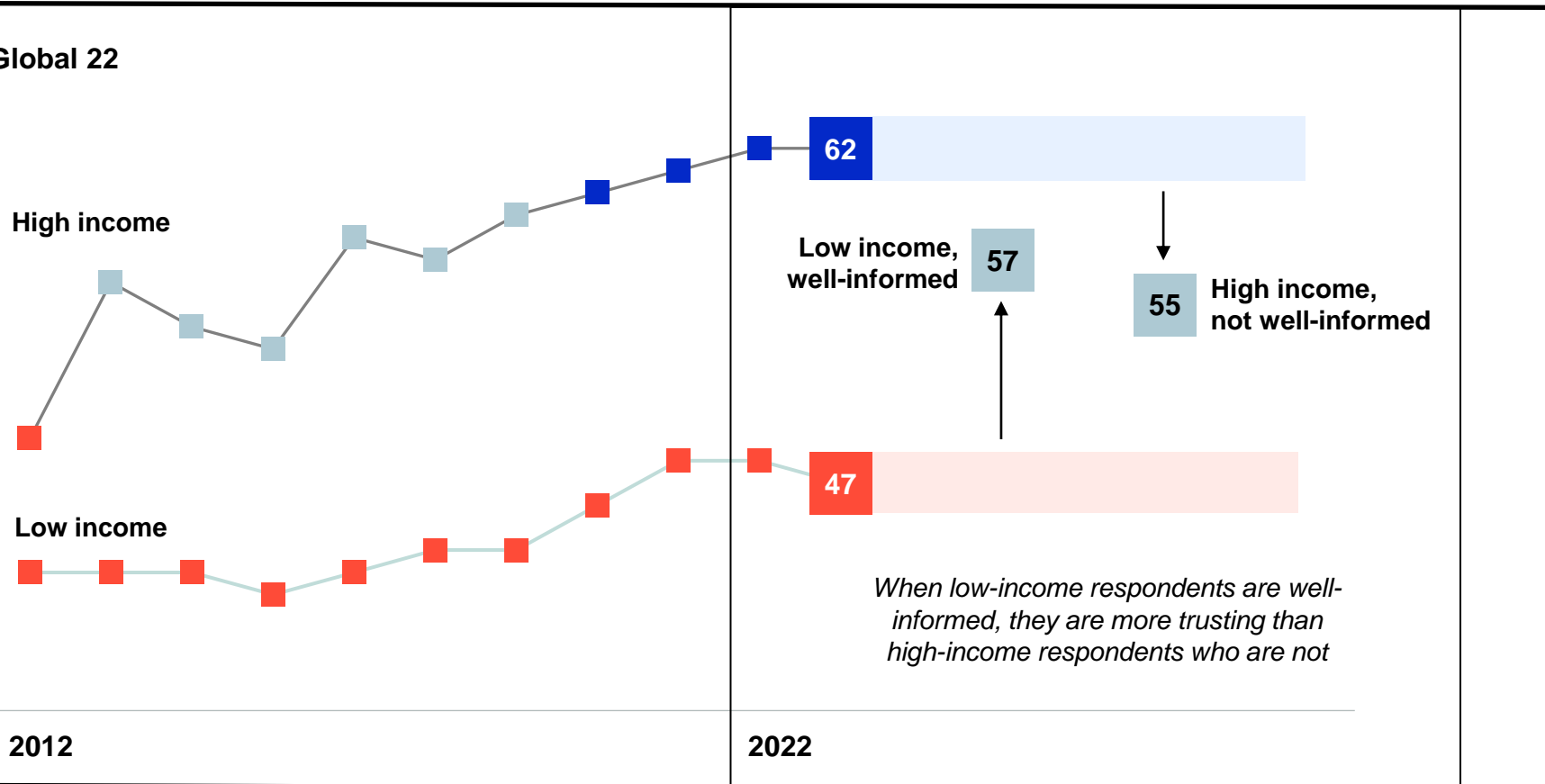
Trust Index



Global 22

High income

Low income



Well-informed

regularly do the following:

Follow news regularly

- Consult 3+ news sources daily
- Read business and/or public policy news

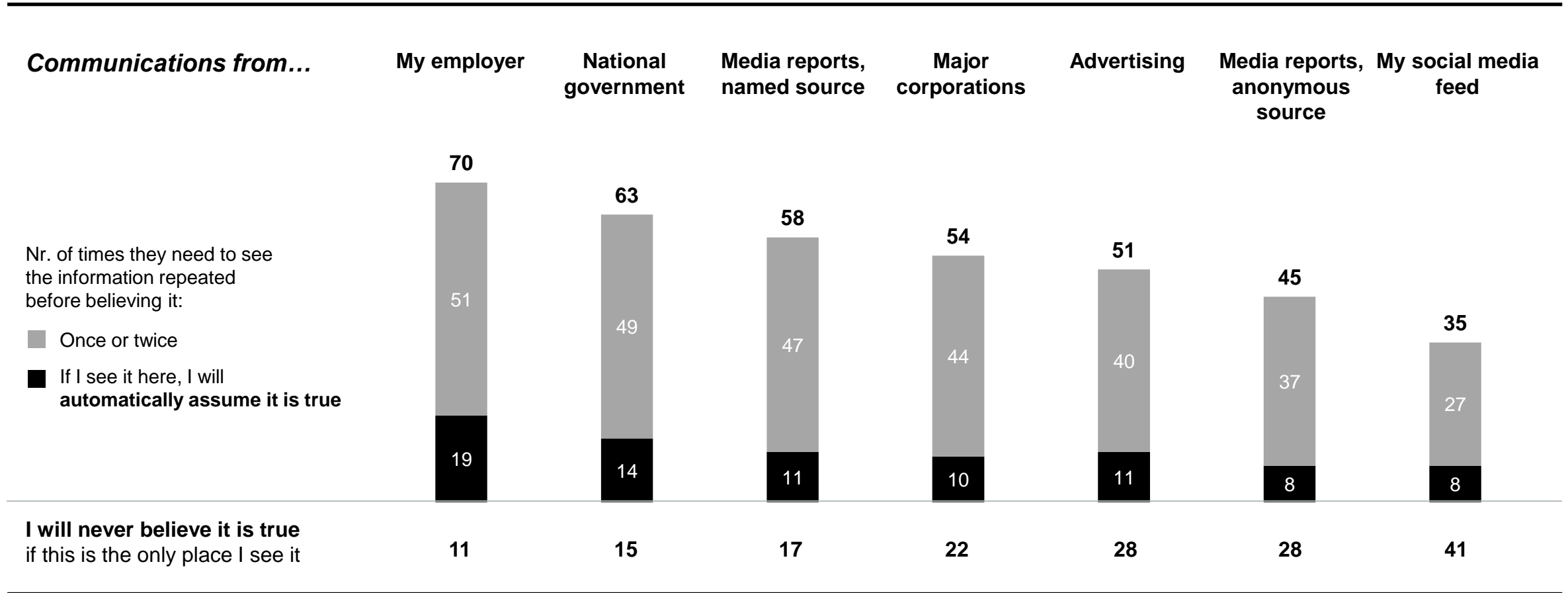
Seek quality information

- Consult news sources with which they disagree
- Check information against multiple sources

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MY EMPLOYER MEDIA MOST BELIEVABLE

Per cent who believe information from each source automatically, or after seeing it twice or less, in Australia



2022 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample. "Once or twice" is a sum of codes 2 and 3. General population, Australia. "Employer communications" only shown to those who are an employee of an organization (Q43/1).



INFORMATION QUALITY NOW MOST POWERFUL TRUST BUILDER ACROSS INSTITUTIONS

Potential trust gain associated with doing each well (top 5)

Business	% pt gain	NGOs	% pt gain	Government	% pt gain	Media	% pt gain
Information quality	3.0	Information quality	3.2	Information quality	6.1	Information quality	6.6
Hold others accountable	2.5	Exert power effectively	2.4	Take a leadership role	3.7	Communication and transparency	3.2
Communication and transparency	2.3	Work with other institutions and organizations	2.3	Exert power effectively	3.5	Exert power effectively	2.5
Exert power effectively	2.1	Take a leadership role	2.1	Long-term thinking and planning	3.2	Change management	2.2
Get results	1.8	Change management	2.0	Hold others accountable	3.2	Hold others accountable	2.0

2022 Edelman Trust Barometer. Regression analysis. CMP_ARE_[INS]. Thinking about [institution] as they are today, please indicate whether you consider each of the following dimensions to be one of their areas of strength or weakness. 5-point scale; top 2 box, strength. Question asked of half of the sample. 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, 24-mkt avg. For a full explanation of how this data was calculated, please see the Technical Appendix. Data not collected in China, Thailand and Russia for CMP_ARE_[INS].

RESTORING TRUST IS KEY TO SOCIETAL STABILITY

Business societal role is here to stay

People want more business leadership, not less.

Demonstrate tangible progress

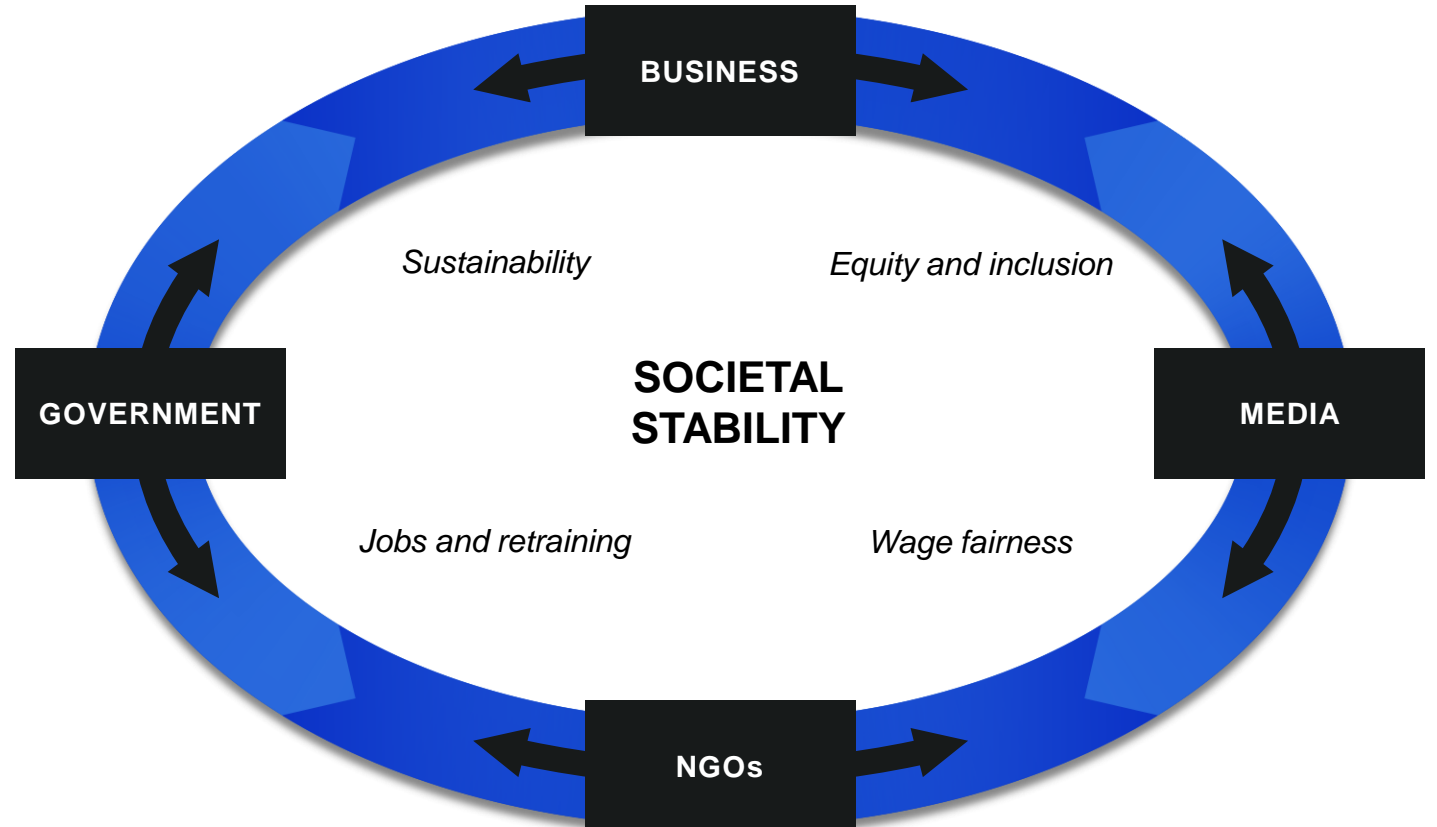
Restore belief in society's ability to build a better future: show the system works.

Leadership must focus on long-term thinking

Solutions over divisiveness; long-term thinking over short-term gain.

Every institution must provide trustworthy information

Clear, consistent, fact-based information is critical to breaking the cycle of distrust.



TECHNICAL APPENDIX



2022 EDELMAN TRUST BAROMETER: SAMPLES

SAMPLE SIZE, QUOTAS AND MARGIN OF ERROR

	General Population			Informed Public		
	Sample Size ¹	Quotas Set On ²	Margin of Error	Sample Size ⁵	Quotas Set On ³	Margin of Error
Global	31,050	Age, Gender, Region	+/- 0.6% total sample +/- 0.8% half sample	6,000	Age, Education, Gender	+/- 1.3% total sample +/- 1.8% half sample
China⁴ and U.S.	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	500	Age, Education, Gender	+/- 4.4% total sample +/- 6.2% half sample
Nigeria	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	100	Age, Education, Gender	+/- 9.8% total sample +/- 13.9% half sample
All other countries	1,150	Age, Gender, Region	+/- 2.9% total sample +/- 4.1% half sample	200	Age, Education, Gender	+/- 6.9% total sample +/- 9.8% half sample

NOTE: Because some of the content we ask is deemed politically sensitive there are several countries where we take special precautions in order to avoid putting our respondents, or ourselves, in a position to break any local laws. We work closely with our sample partner and its legal team to identify which questions, and in what countries, we should refrain from asking. The three countries where we removed questions and/or answer options were China, Russia, and Thailand.

1. Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.
2. For the general population, there were additional quotas on ethnicity in the UK and U.S., and on nationality in the UAE and Saudi Arabia.
3. For the informed public, there were additional quotas on nationality in the UAE and Saudi Arabia.
4. All data collected in China is from the mainland. Regions of Greater China were not surveyed.
5. In some cases, all the informed public sample was collected within the general population; some countries required an oversample to reach the desired target.