



# Edelman Trust Barometer 2021



# 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	<b>Declaring Information Bankruptcy</b>	

# 2021 Edelman Trust Barometer

Surveys conducted this year and presenting today

## January 2021: A Pandemic Inspired Infodemic

Online survey in 28 countries: 33,000+ respondents total  
Timing of Fieldwork: October 19 - November 18, 2020

## Spring Update: A World in Trauma

Online survey in 14 countries: 16,800+ respondents total  
Timing of Field Work: April 30 - May 11, 2021

## Special Report: Trust The New Brand Equity

Online survey in 14 countries: 14,000 respondents total  
Timing of Fieldwork: May 12 - June 2, 2021

## Special Report: The Belief-Driven Employee

Online survey in 7 countries: 7,000 respondents total  
Timing of Fieldwork: August 3 - August 12, 2021

# 5 Key Findings from January 2021 Edelman Trust Barometer and Spring Update

01

## Globally “Covid-19 trust bubble” bursts

- Trust in all four institutions drops (government, business, media and NGO)
- Business only trusted institution

02

## In Japan, trust continues to stagnate

- None of the four institutions are trusted
- Japan is the only market there was no trust bubble

03

## Trust levels in news sources are at record lows globally and in Japan

- Only 1 in 4 globally and 1 in 5 in Japan have good information hygiene

04

## ‘My Employer’ is the most trusted institution

- It is the ONLY trusted one in Japan
- Employer media most trustworthy

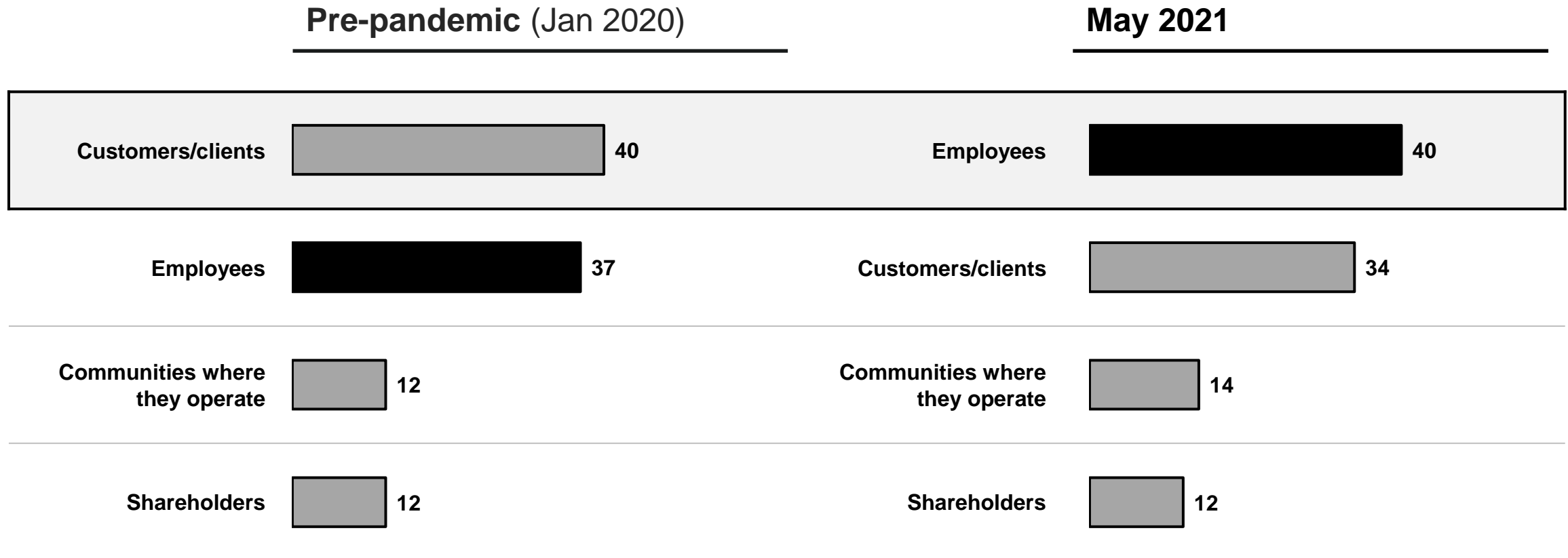
05

## Business has opportunity and accountability

- 60% (global) and 53% (Japan) believe business is central to resolving challenges – and doing better than government
- 53% (global) and 41% (Japan) believe companies must help fill the information void
- 65% believe the pandemic will lead to innovation

# EMPLOYEES NOW MOST IMPORTANT STAKEHOLDER; FOLLOWED BY CUSTOMER/CLIENTS

Percent who ranked each group as most important to a company achieving long-term success



2021 Edelman Trust Barometer Spring Update: A World in Trauma. PPL\_RNK. Please rank the following four groups of people in terms of their importance to a company achieving long-term success. Give the most important group a rank of 1 and the least important a rank of 4. Question asked of half of the sample. General population, 14-mkt avg.

⊥

**BELIEF-DRIVEN  
EMPLOYEE**

⊥



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

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

Better fit with my values

48%

Better fit for my lifestyle

55%

Better compensation or career advancement

31%

*least likely to be a reason for leaving*

**Net agreement**

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

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

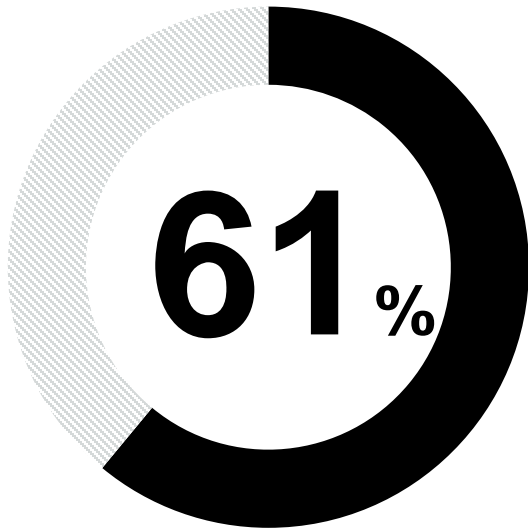
- Looking to earn more money or get better benefits
- Looking to move up and advance my career

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

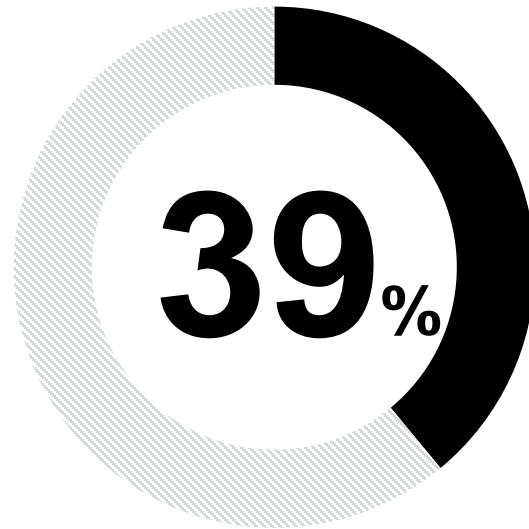


# 6 IN 10 GLOBALLY CHOOSE THEIR EMPLOYER BASED ON BELIEFS

Percent who choose employers based on their values and beliefs



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



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

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

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

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

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

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

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



# ALL JOB EXPECTATIONS RISE; OVER 1 IN 2 EXPECT OPPORTUNITIES FOR SOCIAL IMPACT

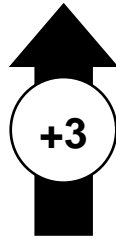
Average percent who say each is a strong expectation or a deal breaker when considering a job, in Japan



Change, Jan 2019 to Aug 2021

## Career advancement

68%



## Personal empowerment

63%



## Social impact

54%



**Average agreement**

Competitive wages

Valuable work experiences and training

Opportunities to move up

Regular, truthful communication

Easy for employees to give input

Include employees in the planning process

CEO embodies the values of the organization

Employees reflect customer diversity

Will not promote those who do not live up to company values

Business reflects my values

Has a greater purpose

Meaningful work that shapes society

Opportunities to address social problems

Would stop engaging in specific business practices if employees objected

CEO addresses controversial issues I care about

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

# WORKPLACE ACTIVISM BECOMES THE NORM

Percent who will take action

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



76% 60%

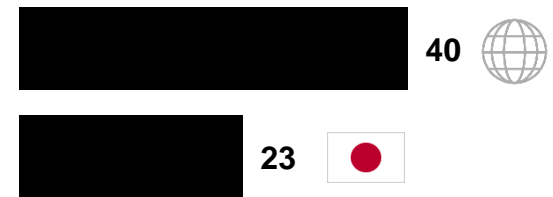
## Work within the system

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



## Take it public

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

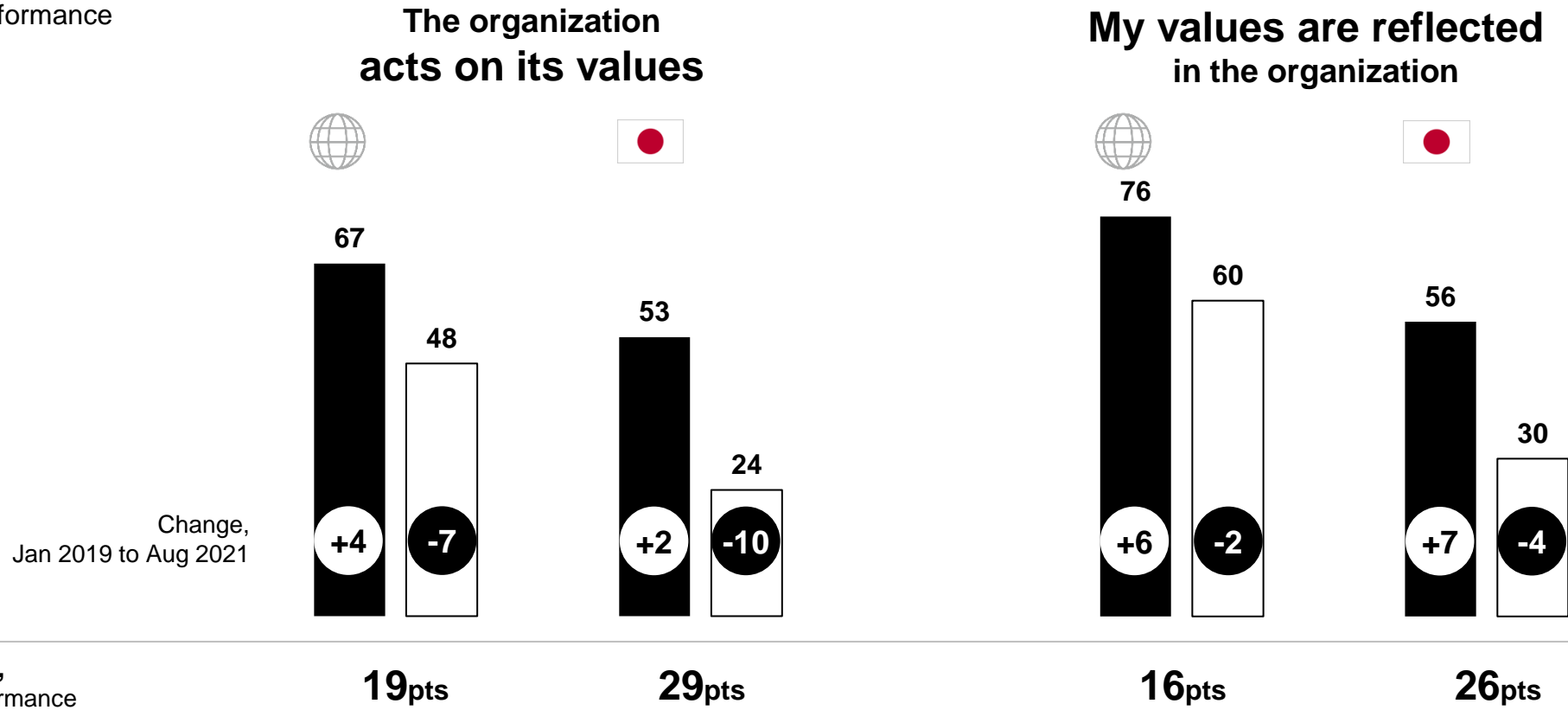


# MIND THE GAP: WALK THE TALK ON VALUES

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



Expectation      Performance

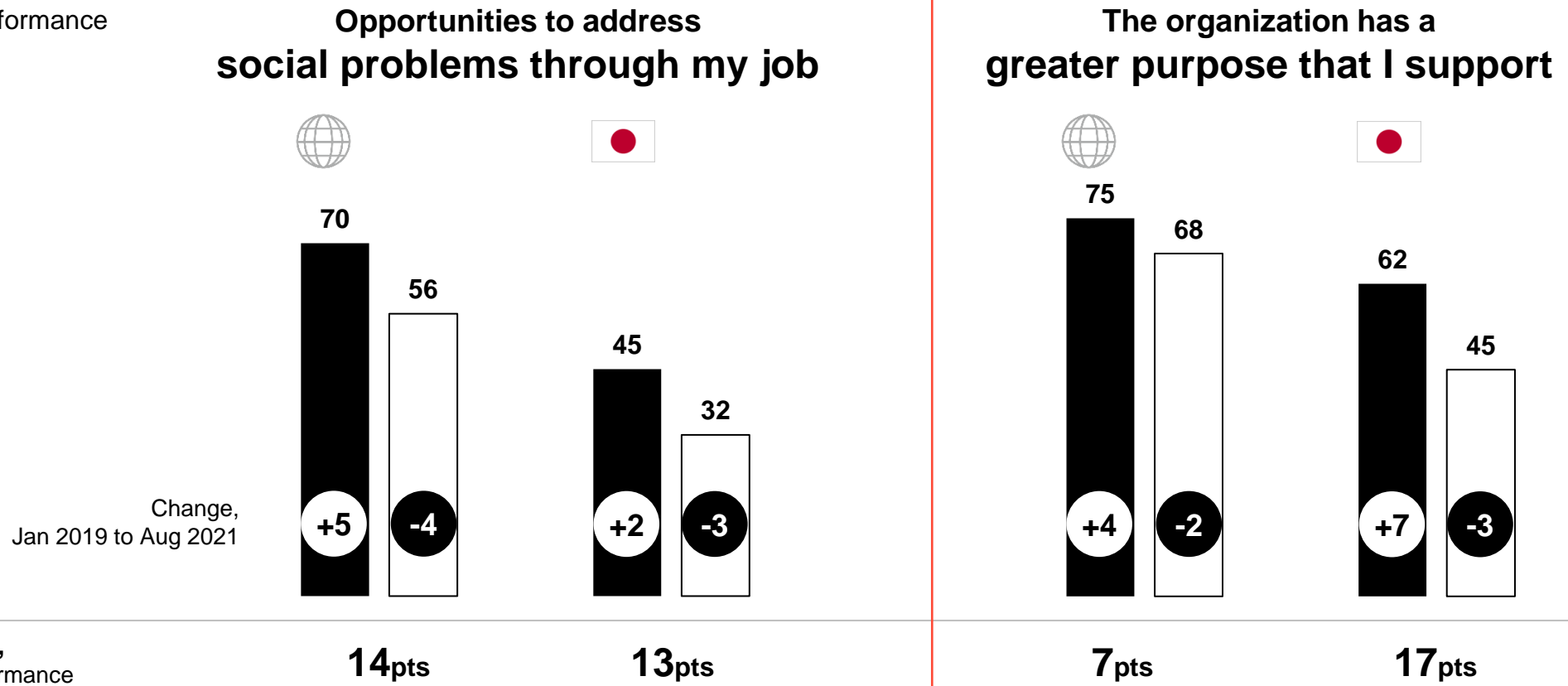


2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. EMP\_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item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

# ENABLE THEM TO HAVE SOCIAL IMPACT

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

■ Expectation □ Performance



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

# ACCELERATE COMMITMENTS TO SUSTAINABILITY, TRAINING, AND DEI

## Environment

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

## Reliable employment

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

## DEI

It is important to me that employees at all levels within the organization **reflect the diversity of the customers and community we serve**



62% 45%



81% 64%



75% 59%

2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee. BIG\_SELL. Jobs can come with many enticements to get you to go sign on with a particular organization over another. Using the scale below, rate each of the following enticements in terms of how compelling each would be in getting you to take a job offer with one organization over another which could not offer that same thing. 5-point scale, top 2 box, compelling. EMP\_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Please indicate your answer to each item using the scale below. 3-point scale; top 2 box, important. Question asked of those who are an employee (Q43/1). 7-mkt avg., and Japan. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

⊥

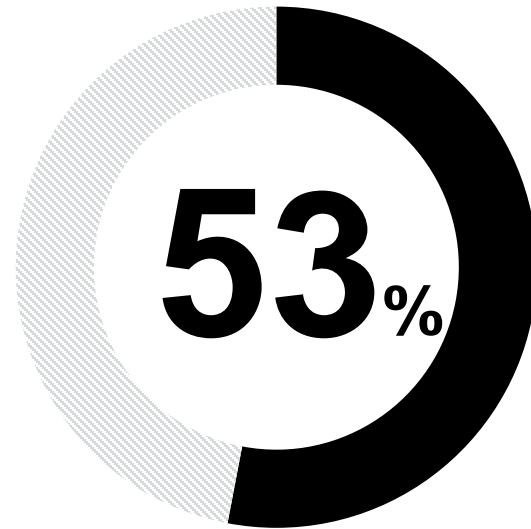
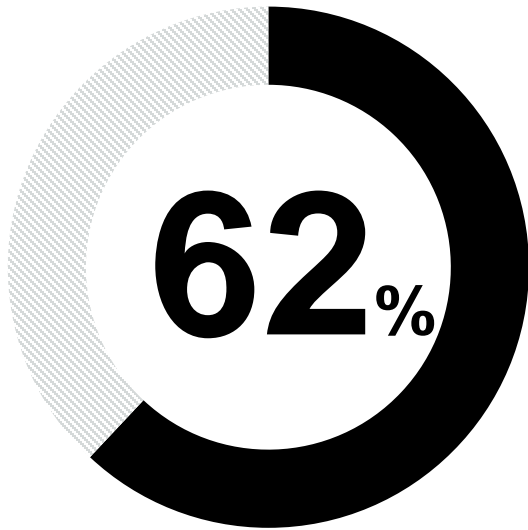
# BELIEF-DRIVEN BUYER

⊥



# NEARLY 2 IN 3 GLOBALLY BELIEF-DRIVEN BUYERS

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



**Choose, switch, avoid or boycott a brand**  
based on its stand on societal issues

Even if a company makes the product that I like most, I will not buy it if I disagree with the company's stand on important social issues

I have bought a brand for the first time for the sole reason that I appreciated its position on a controversial societal or political issue

I have stopped buying one brand and started buying another because I liked the politics of one more than the other

I have strong opinions about many societal and political issues. The brands I choose to buy and not buy are one important way I express those opinions

If a brand offers the best price on a product, I will **not** buy it because I disagree with the company's stand on controversial social or political issues

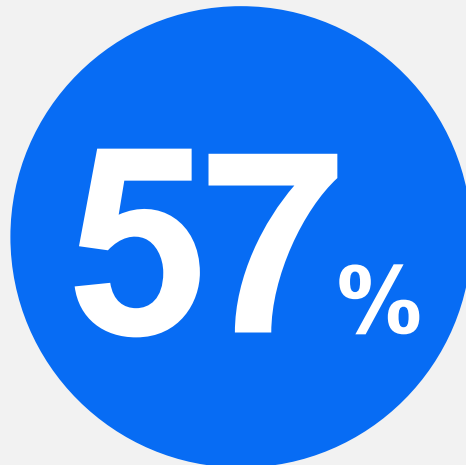
I have stopped buying a brand solely because it remained silent on a controversial societal or political issue that I believed it had an obligation to publicly address



# CONSUMERS WANT TO USE THEIR BRAND POWER TO MAKE SOCIETY BETTER



I can force a brand to change its **company's societal impact** (net)



## Consumers believe they can force brands to:



Reduce carbon footprint	37	23
Improve labor practices	38	22
Use environmentally-friendly materials	39	21
Increase workforce diversity	32	20
Manufacture products in this country	31	18
Get rid of CEO	25	17
Get CEO to speak out	27	12
Pay fair share of taxes	33	12

# OPERATING IN A BELIEF-DRIVEN WORLD

1

## Culture drives trust

*Articulating and living your purpose and values is critical.*

2

## Employees first

*Consumers, investors and employees all agree that employees are now your most important—and influential—stakeholder.*

3

## Channel the voice

*Employees know they now hold more power and want more participation. Create platforms and opportunities to share them.*

4

## Make a Difference

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