



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

Ages

18+

1,150 respondents per country

1,500 in Canada

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



All population not including informed public

Represents **83%** of total global population

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 Plummets	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

CANADA SEES MODERATE TRUST GAINS

Trust Index

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

Change, 2020 to 2021

+)

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 Per cent 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						
	54	Global 27	56	G				
	82	China	77	Ir				
	79	India	72	С				
	73	Indonesia	72	Ir				
	66	Thailand	69	S				
	65	UAE	68	S				
	62	Mexico	67	U				
	62	Singapore	66	N				
	61	Saudi Arabia	63	Т				
	60	Malaysia	61	Т				
	57	Kenya	59	Α				
	57	The Netherlands	59	K				
*	53	Canada	59	N				
	53	Colombia 😽	56	С				
	51	Brazil	53	G				
	50	S. Korea	52	lt				
	49	Argentina	51	В				
	49	Italy	50	Ir				
	47	Australia	48	С				
	47	U.S.	48	F				
	46	Germany	48	S				
	45	France	48	U				
	45	Ireland	47	A				
	45	Spain	47	S				
	44	S. Africa	45	S				
	42	Japan	45	U				
	42	UK	40	J				
	30	Russia	31	R				

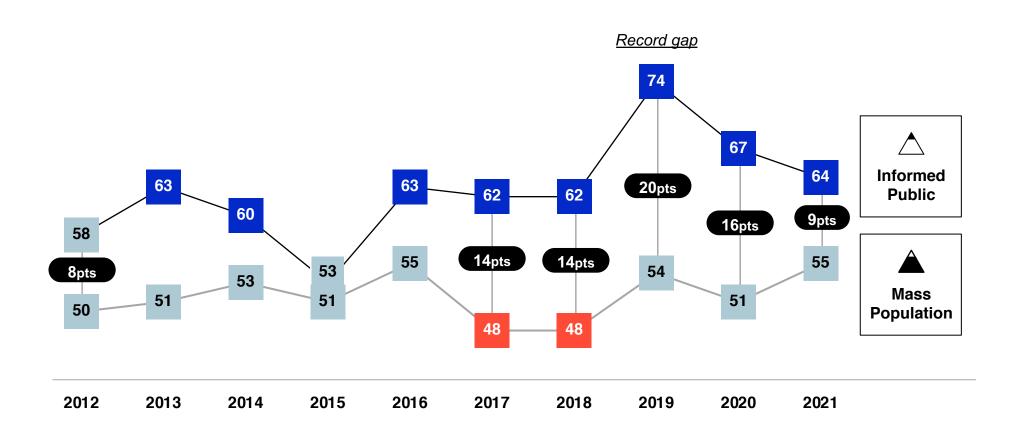


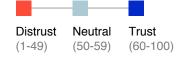
Record year-overyear decline in China's Trust Index

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TRUST INEQUALITY GAP CLOSING IN CANADA

Trust Index, Canada



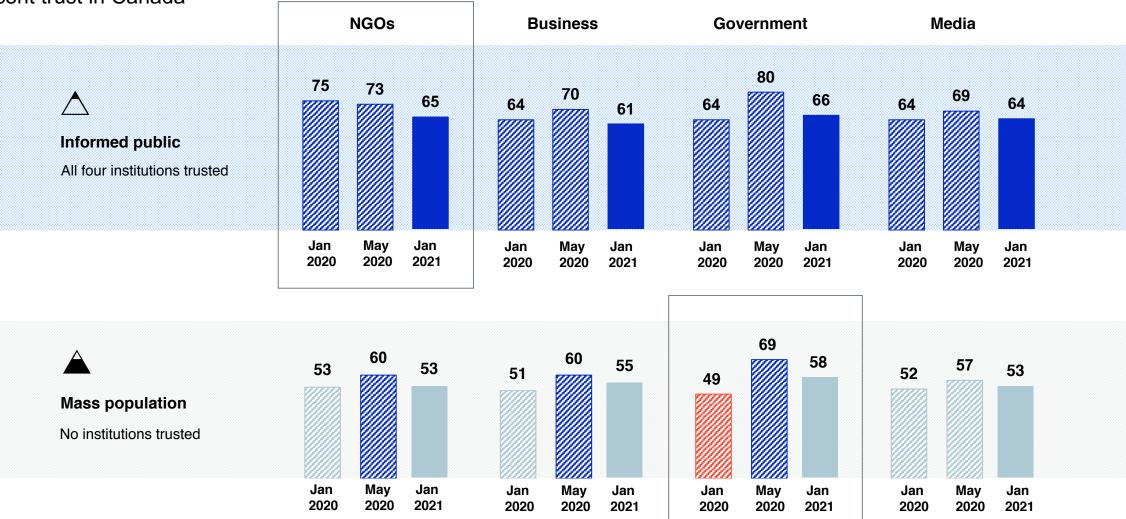


2021 Edelman Trust Barometer. The Trust Index is the average per cent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass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

TWO DIFFERENT TRUST REALITIES



Per cent trust in Canada

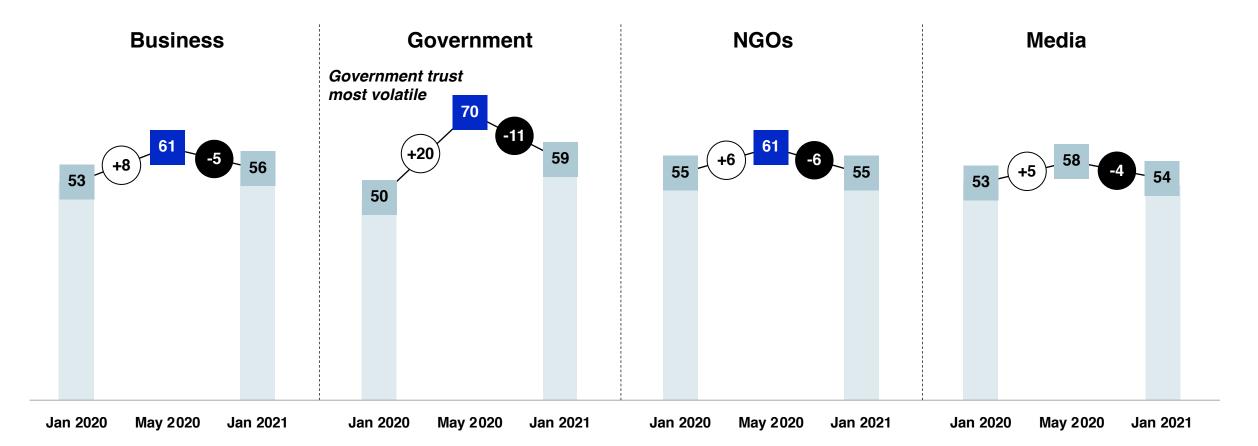


2021 Edelman Trust Barometer. The Trust Index is the average per cent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass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

IN CANADA, TRUST DECLINES ACROSS ALL INSTITUTIONS FOLLOWING SPRING SURGE

Per cent trust in Canada

Distrust
(1-49)Neutral
(50-59)Trust
(60-100)Change, wave to wave

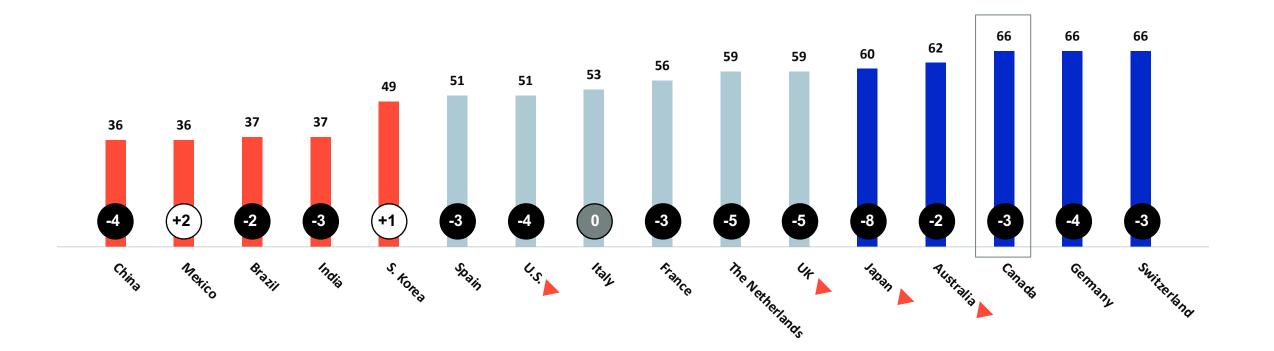




BRAND CANADA MAINTAINS TRUST

Trust in companies headquartered in each country





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. General population, 27-mkt avg.

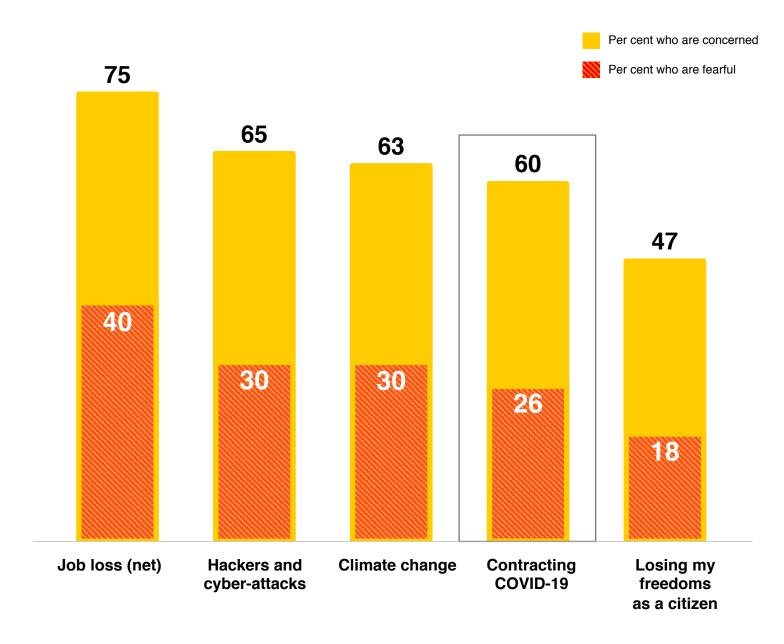
PANDEMIC IMPACT

PANDEMIC ADDS TO SOCIETAL FEARS

Per cent who are concerned, and per cent who are fearful, in Canada

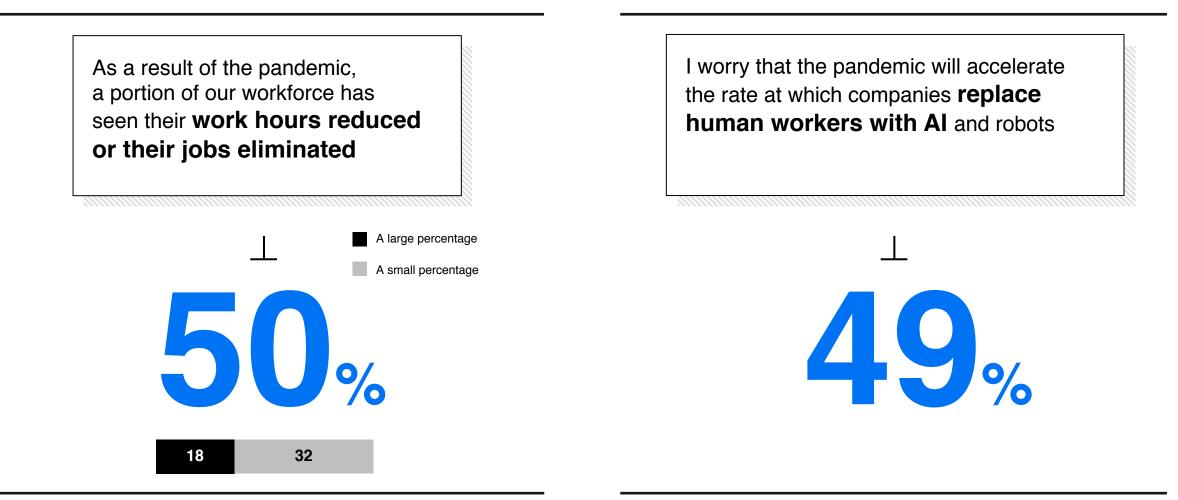
2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes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

 $\boldsymbol{*}$



PANDEMIC ACCELERATES JOB LOSS FEARS

Per cent who agree, in Canada



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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 Per centage; code 2, yes, a small Per centage. Question asked of those who are an employee (Q43/1). Total layoff/furlough Per centage 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, Canada.

PANDEMIC FEARS IMPEDE RETURN TO WORKPLACE

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



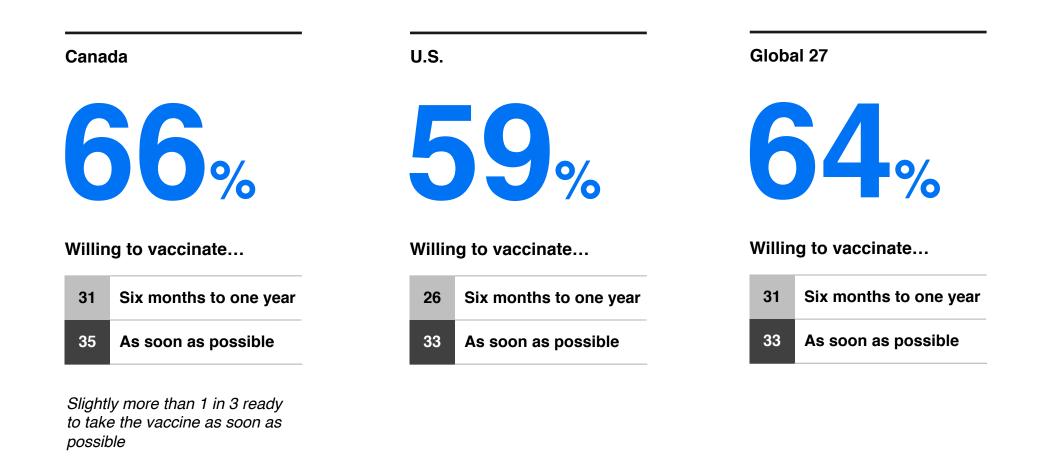
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2021 Edelman Trust Barometer. WRK_CHOICE. Which of the following best describes your current working situation? Question asked of those who are an employee (Q43/1). Data among employees that have a choice of working from home or their workplace. WHY_HOME. 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, Canada. COVID-19 risk while commuting / in office is a net of WHY_HOME/2-3.

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VACCINE HESITANCY REMAINS A CONCERN

Per cent who say they will take the COVID-19 vaccine within the next year

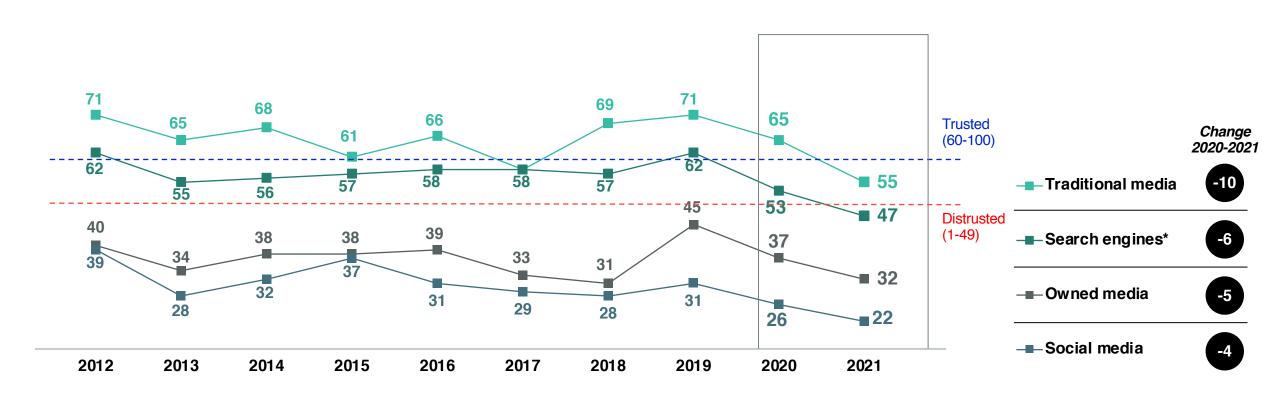




NO VACCINE MY BODY NEEDED MYCHOICE MISINFORMATION FEEDS MISTRUST MEWS IMMUNE SYSTEM

TRUST IN MOST INFORMATION SOURCES AT RECORD LOWS

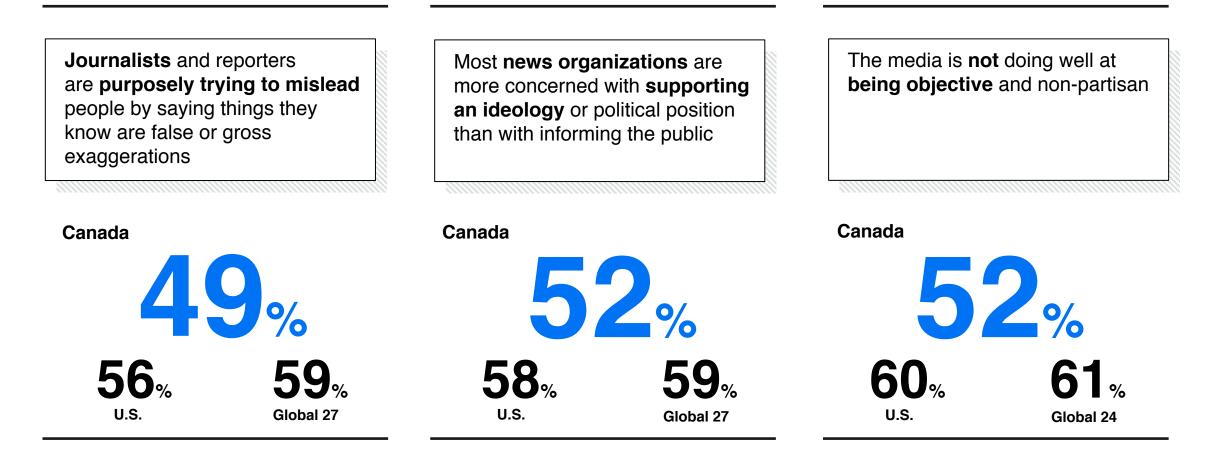
Per cent trust in each source for general news and information, in Canada



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

EVOLVING PERCEPTIONS CHALLENGE CANADIAN NEWSROOMS

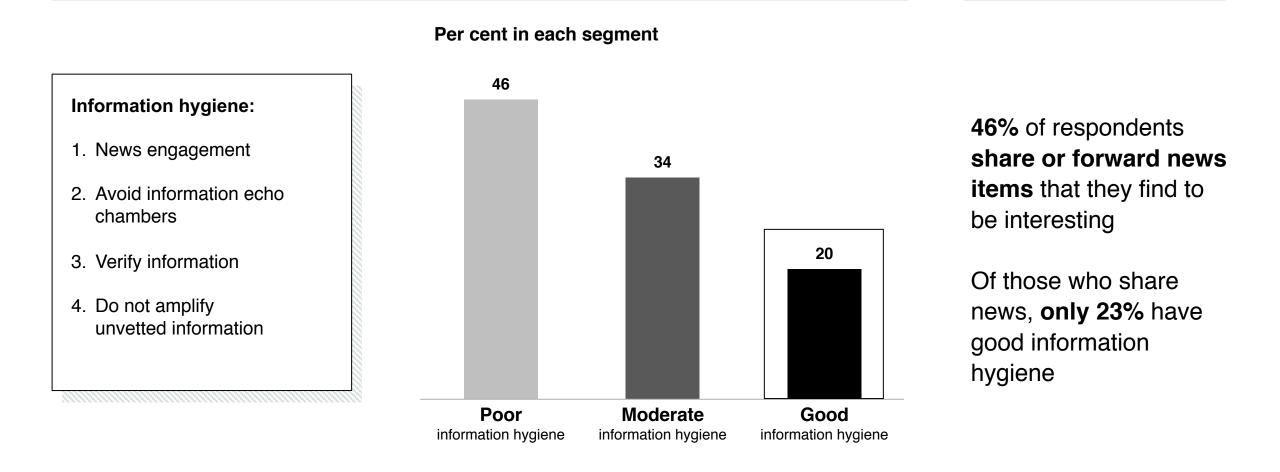
Per cent who agree, in Canada



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. Attributes shown to half of the sample. General population, Canada, U.S., and 27-mkt avg. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Canada, U.S., and 27-mkt avg. PER_MED. How well do you feel the media is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; bottom 3 box, not doing well. Question asked of half of the sample. General population, Canada, U.S., and 24-mkt avg. Data not collected in China, Russia, and Thailand.

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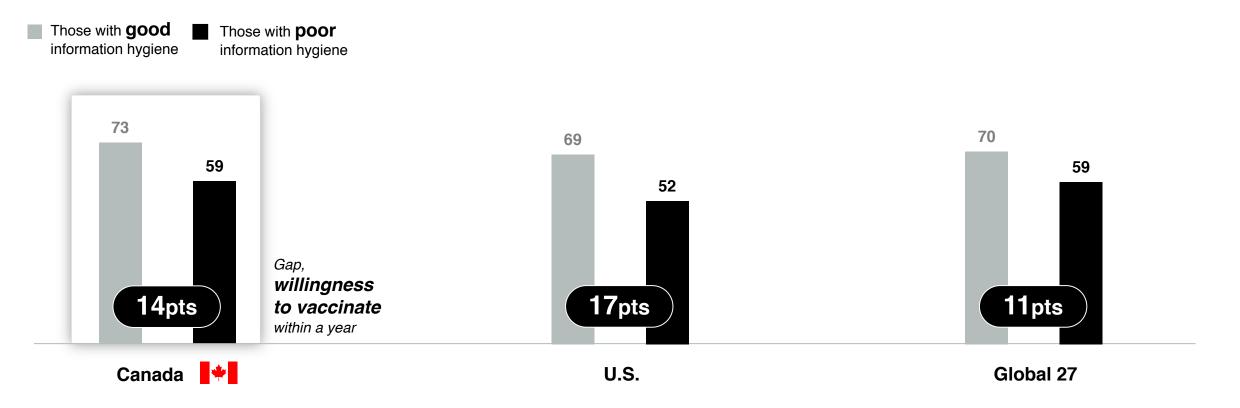
IN CANADA, ONLY 1 IN 5 HAVE GOOD INFORMATION HYGIENE



2021 Edelman Trust Barometer. Information Hygiene Scale. 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. 7-point scale; top 5 box, several times a month or more. General population, Canada. For full details on how the Information Hygiene Scale was built, please refer to the Technical Appendix.

POOR INFORMATION HYGIENE THREATENS PANDEMIC RECOVERY

Per cent who say they will take the COVID-19 vaccine within a year



2021 Edelman Trust Barometer. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half of the sample. General population, Canada, U.S., and 27-mkt avg., by hygiene level. For full details on how the Information Hygiene Scale was built, please refer to the Technical Appendix.

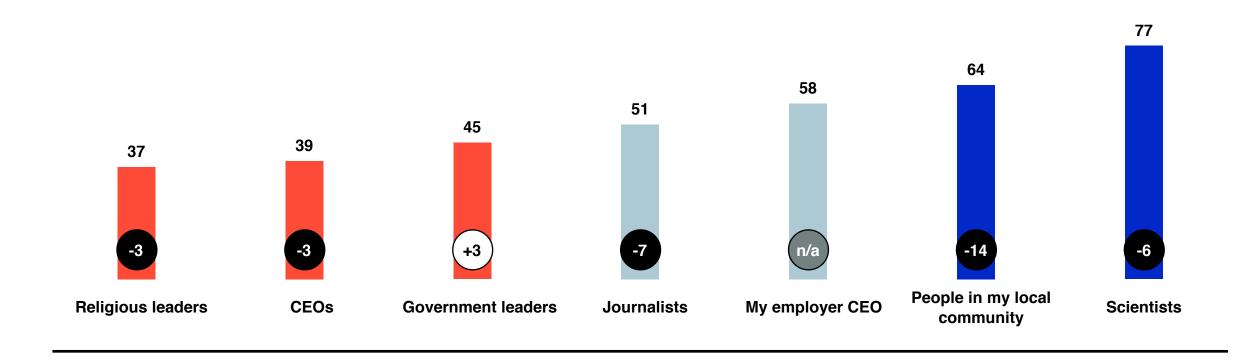
CRISIS OF LEADERSHIP

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SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Per cent trust, in Canada

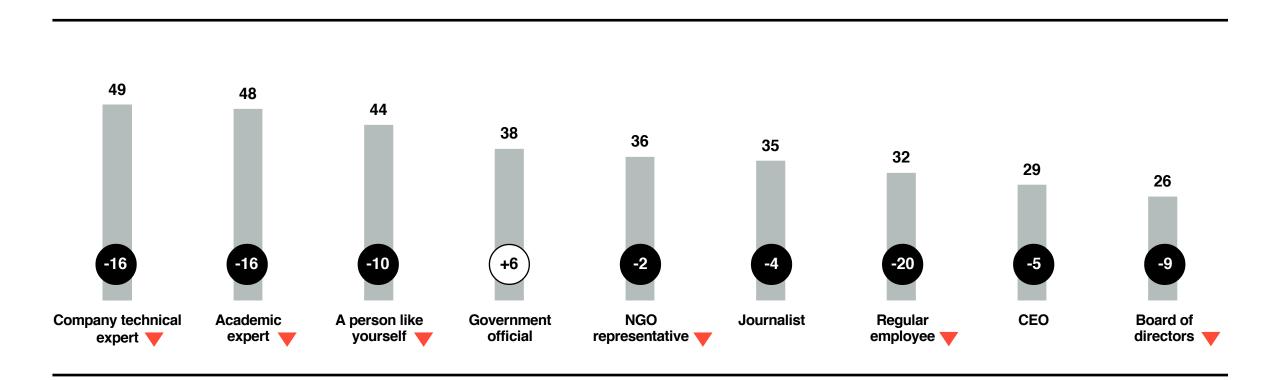




2021 Edelman Trust Barometer. TRU_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. Attributes shown to half of the sample; "My employer CEO" only shown to those that are an employee (Q43/1). General population, Canada.

NEARLY ALL SPOKESPEOPLE LOSE CREDIBILITY

Per cent who rate each as very/extremely credible as a source of information about a company, in Canada



2021 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, Canada.

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All-time low

Change, 2020 to 2021

(+)

SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Per cent who worry, in Canada

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

50%

46%

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. Attributes shown to half of the sample. General population, Canada.

AN EXPANDED MANDATE FOR BUSINESS

BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Per cent who agree, in Canada

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

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

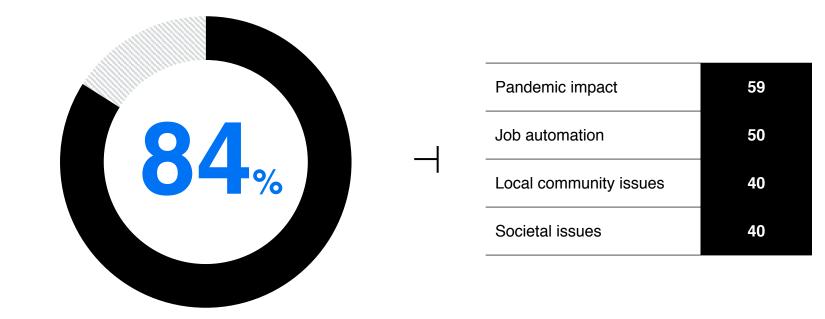
b y_%

65%

2021 Edelman Trust Barometer. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? 3-point scale, sum of codes 2 and 3. Question asked of half of the sample. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Canada.

CEOS MUST LEAD ON SOCIETAL ISSUES

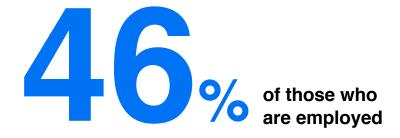
Per cent in Canada who expect **CEOs to publicly speak out** about one or more of these societal challenges



2021 Edelman Trust Barometer. CEO_SPEAK. Looking at the topics listed below, please select the ones you expect CEOs to currently be speaking out about publicly. Select all that apply. Question asked of half of the sample. General population, Canada. CEO expectation to speak out is a net of attributes 1, 2, 5 and 7.

EMPLOYEES AND CONSUMERS FEEL EMPOWERED TO DRIVE CHANGE

Per cent who agree, in Canada





Consumers ...

62%

Employees ...

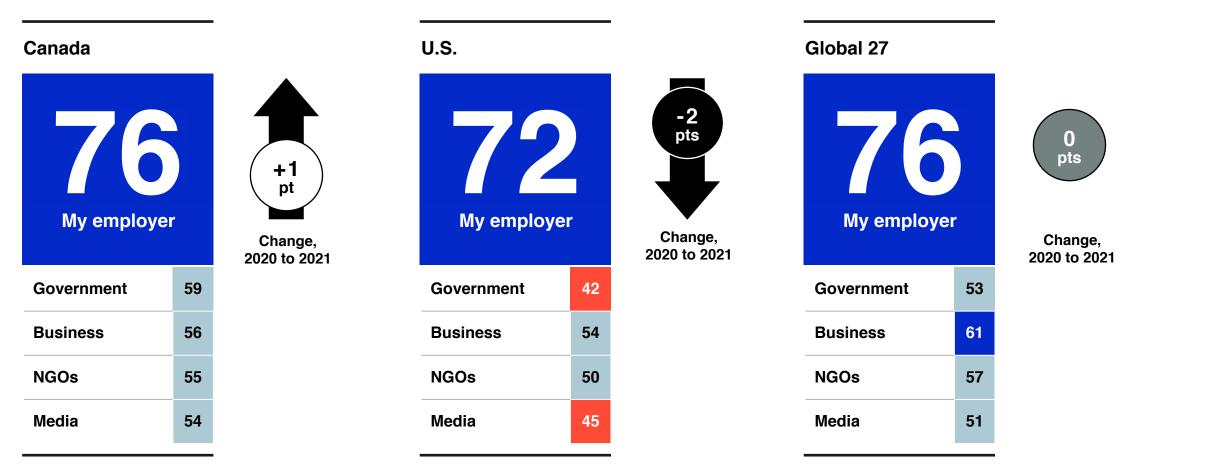
I am more likely now than a year ago to voice my objections to management or engage in workplace protest

have the power to force corporations to change

2021 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 of the sample. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee (Q43/1). General population, Canada.

TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

Per cent trust in my employer



2021 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. 9-point scale; top 4 box, trust. General population, Canada, U.S., and 27-mkt avg. Question asked among those who are employed (Q43/1).



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Change, 2020 to 2021

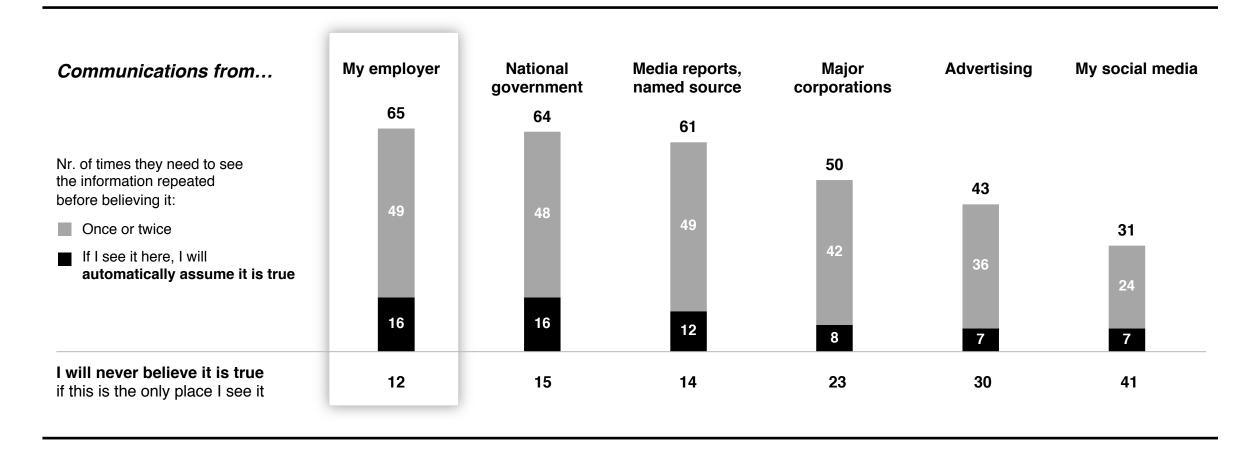
Distrust

Neutral

Trust

EMPLOYER COMMUNICATIONS MOST BELIEVABLE

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



2021 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, Canada. "Employer communications" only shown to those that are an employee (Q43/1).

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EMERGING FROM INFORMATION BANKRUPTCY

1.

Lead with facts, act with empathy

Societal leaders must have the courage to communicate transparently, but also empathize and address people's fears.

2.

Provide truthful, unbiased, reliable information

All institutions, including media, must provide truthful and trustworthy information.

3.

Business: Embrace imperative to lead or fall behind

Business must lead and communicate through their own channels on issues from pandemic impact and systemic racism to climate change.

4.

Partner across institutions

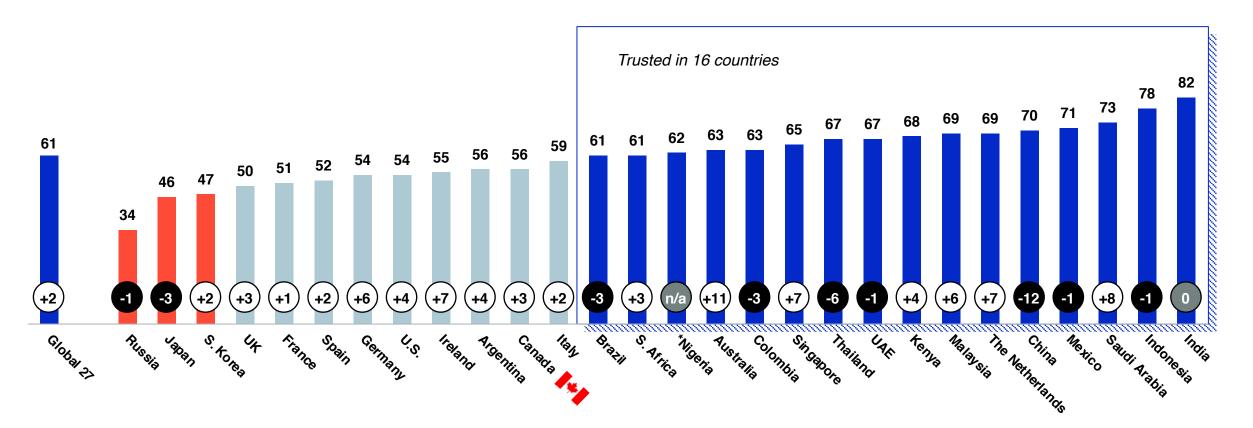
All institutions must find a common purpose and take collective action to solve societal problems.

SUPPLEMENTAL DATA

1000

CANADA SEES MODERATE TRUST GAINS IN BUSINESS

Per cent trust



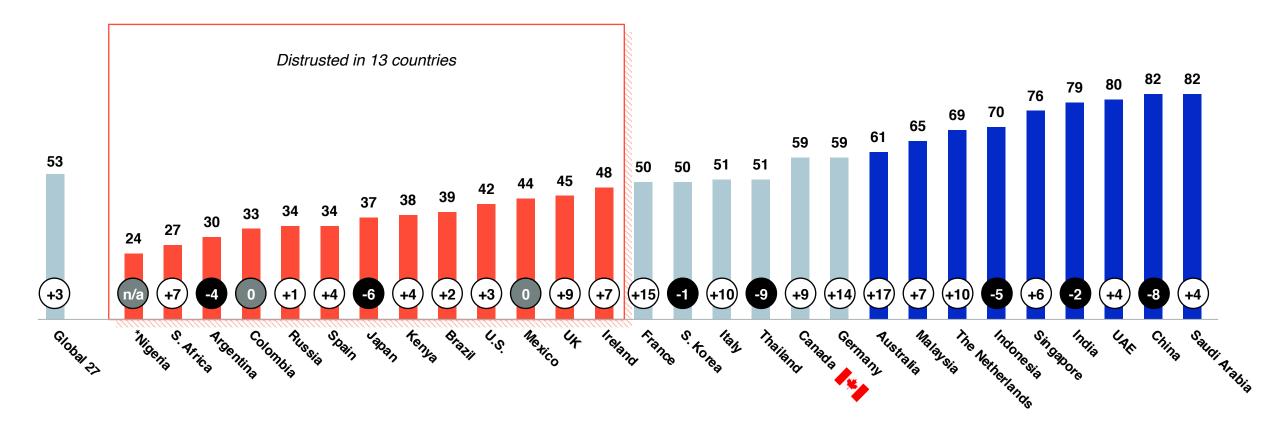
2021 Edelman Trust Barometer. TRU_INS. [Business in general] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Nigeria not included in the global average



TRUST IN GOVERNMENT INCREASES IN CANADA

Per cent trust

Distrust Neutral Trust Change, 2020 to 2021

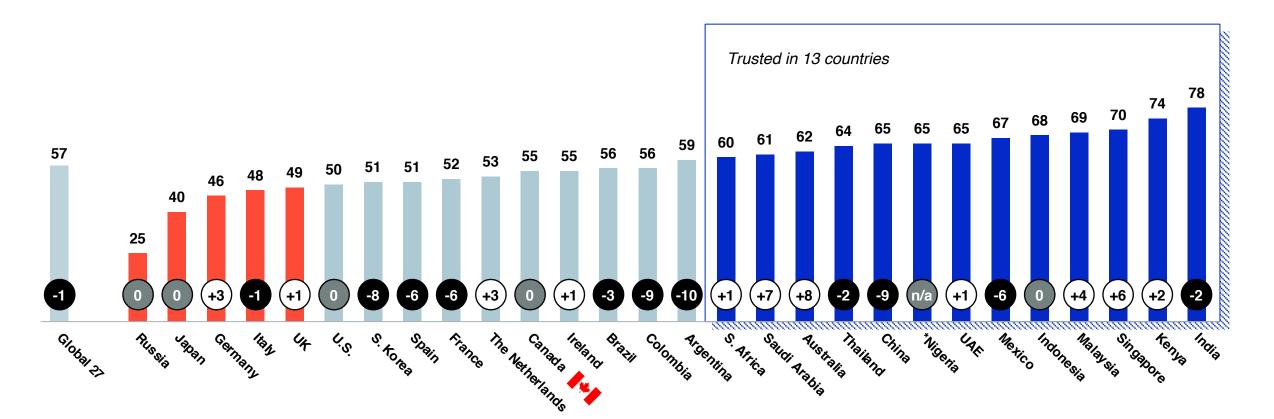


2021 Edelman Trust Barometer. TRU_INS. [Government in general] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Nigeria not included in the global average

TRUST IN NGOS REMAINS UNCHANGED IN CANADA

Per cent trust



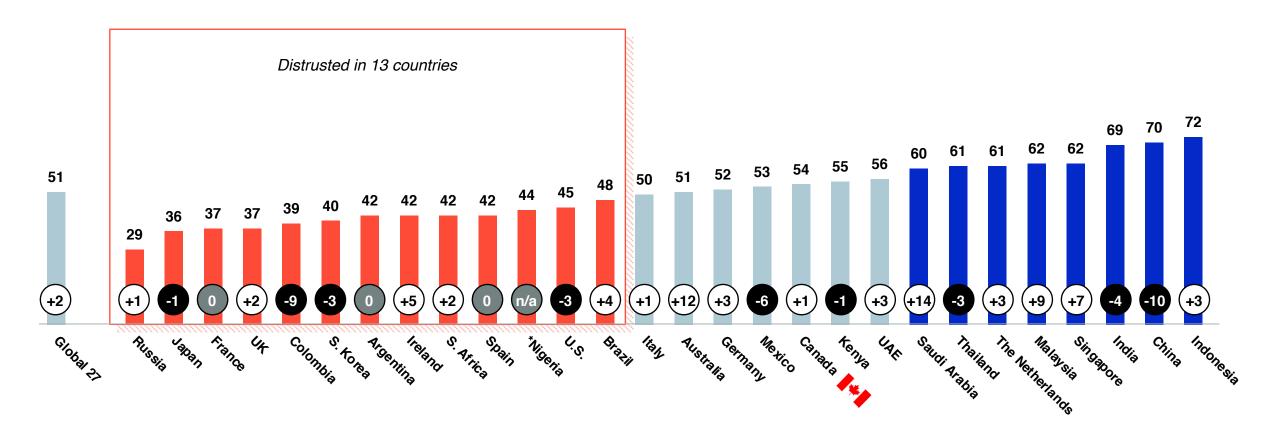


2021 Edelman Trust Barometer. TRU_INS. [NGOs in general] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Nigeria not included in the global average

CANADA SEES MODERATE TRUST GAINS IN MEDIA

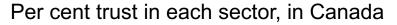
Per cent trust

Distrust Neutral Trust Change, 2020 to 2021

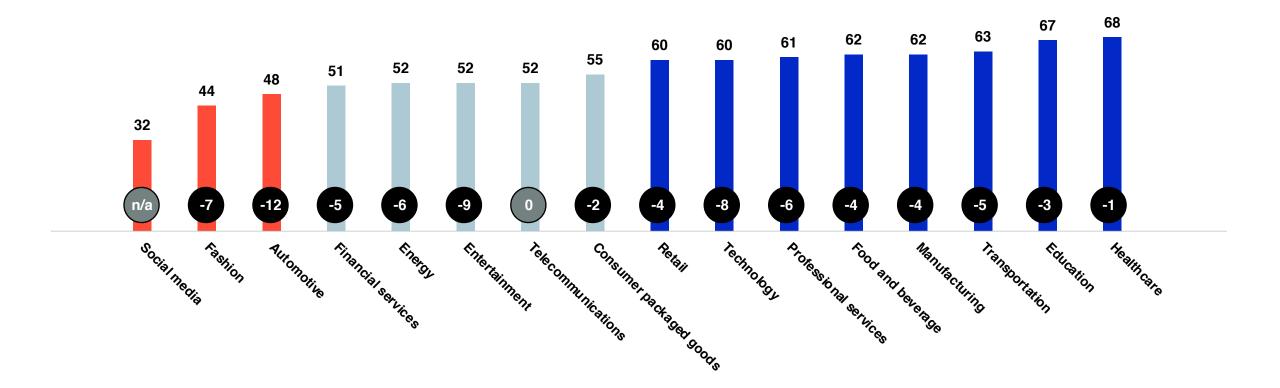


2021 Edelman Trust Barometer. TRU_INS. [Media in general] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Nigeria not included in the global average

TRUST DECLINES ACROSS SECTORS







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, Canada.

TECHNICAL APPENDIX

2021 EDELMAN TRUST BAROMETER HOW WE MEASURED INFORMATION HYGIENE

To determine whether respondents practiced good information hygiene, we measured four dimensions:

- 1. Regular engagement with news: Do they stay informed?
- 2. Engagement with differing points of view: Do they avoid information echo chambers?
- 3. Information verification: Do they avoid assuming something is true simply because it supports their point of view?
- 4. Avoids spreading misinformation: Do they check information veracity before forwarding content to others?

Each respondent's level of information hygiene was categorized based on their performance across the four dimensions:

- Good: Performs well on three or more dimensions
- Moderate: Performs well on any two dimensions
- Poor: Performs well on one or fewer dimensions

- 1. News engagement (does one or more of these several times a week or more)
- "Read, view or listen to news and information produced by major news organizations or publications at the original source" MED_SEG_OFTr1
- "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" MED_SEG_OFTr2
- "Read, view or listen to news and information put out by major corporations regarding important social and political issues and events" MED_SEG_OFTr16
- "Listen to podcasts or read newsletters or blog posts put out by independent individuals whom I trust to keep me informed about important issues, but who do not work for a news media company" MED_SEG_OFTr17
- 2. Avoiding information echo chambers (must say they do one or more of these)
- "How often do you read or listen to information or points of view from people, media sources or organizations with whom you often disagree?" NEWS_DIS (weekly or more)
- "When someone you know sends you some information that supports a position that you do NOT believe, which of the following do you typically do with it?" POS_DIS (study thoroughly)
- **3. Verify information** (must say they do two or more of these)
- "Confirm that a news story is really true by looking across multiple information sources" MED_SEG_OFTr15 (several times a week or more)
- "When someone you know sends you some information that supports a position you believe, which of the following do you typically do with it?" POS_BEL (use fact-checking sites and/or verify from people I know and/or go to original source material)
- **4.** Do not amplify unvetted information (must never do this)
- "Pass on news and information to others without first checking its accuracy or the integrity of the source" MED_SEG_OFTr18

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