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# Airmic Live 2021

Digital Event Series

## The Edelman Trust Barometer report 2021

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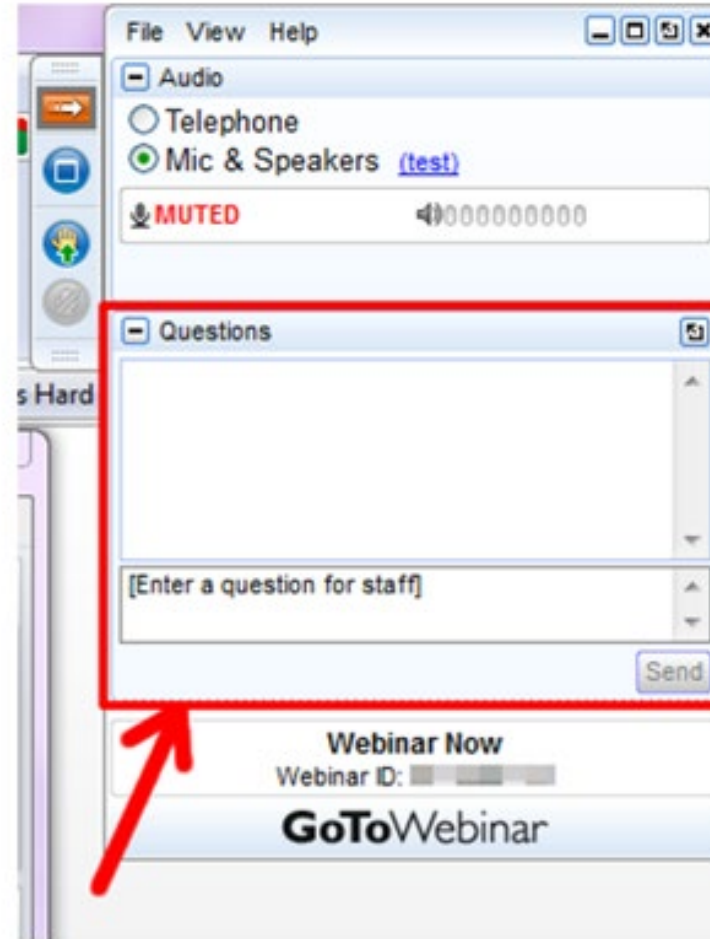
Airmic Live 2021

Digital Event Series





# How to ask questions







# Edelman Trust Barometer 2021



DUE TO THE  
COVID-19 PANDEMIC  
FOR THE HEALTH  
+ SAFETY OF  
STAFF + CUSTOMERS  
WE ARE CLOSED  
UNTIL FURTHER  
NOTICE.





# AGENDA

1

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**REPORT  
OVERVIEW**

2

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**KEY  
FINDINGS**

3

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**TAKEAWAYS**

4

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**Q&A**



# 21<sup>st</sup> 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

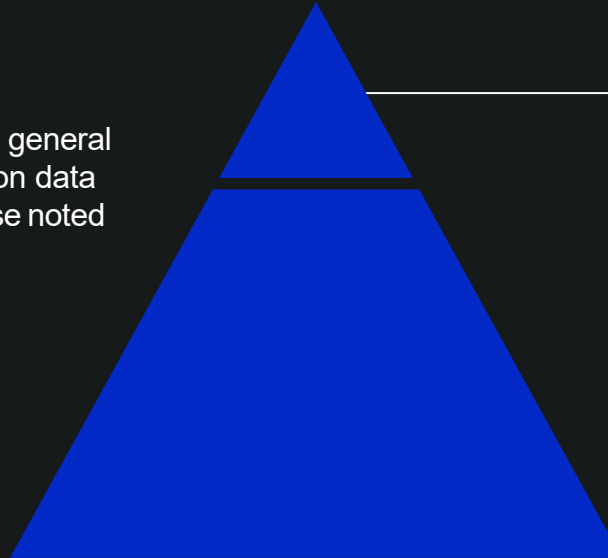
**1,150**

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 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	<b>Declaring Information Bankruptcy</b>	



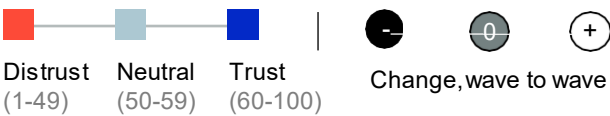


# PANDEMIC PUTS TRUST TO THE TEST

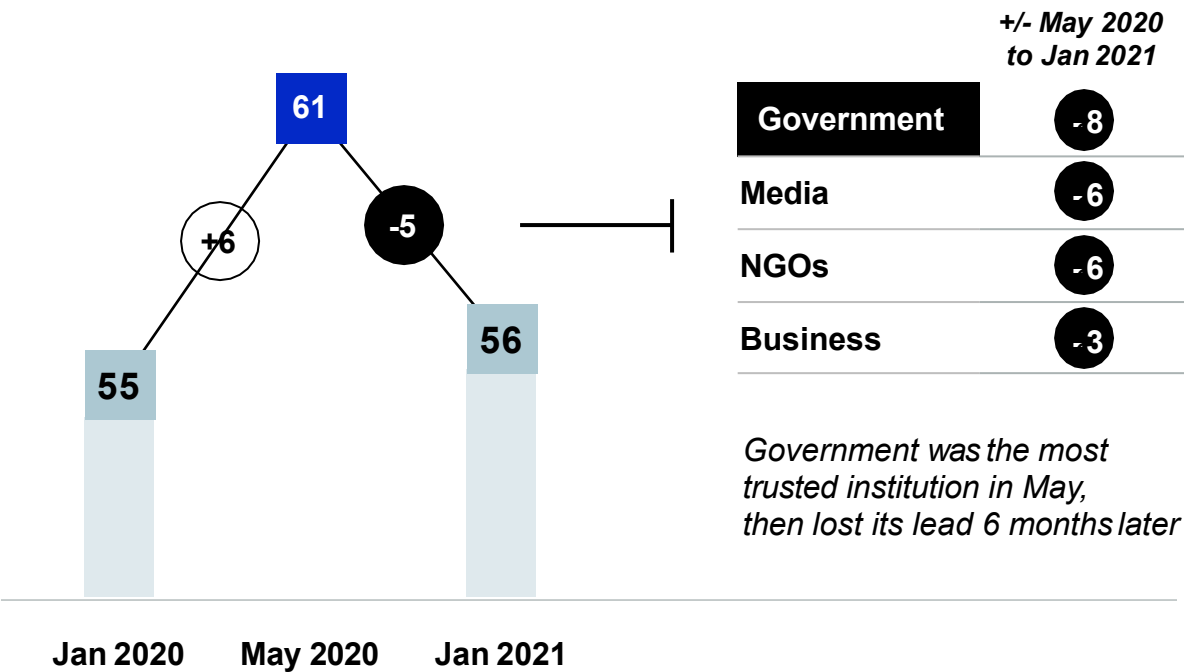


# SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

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	+22

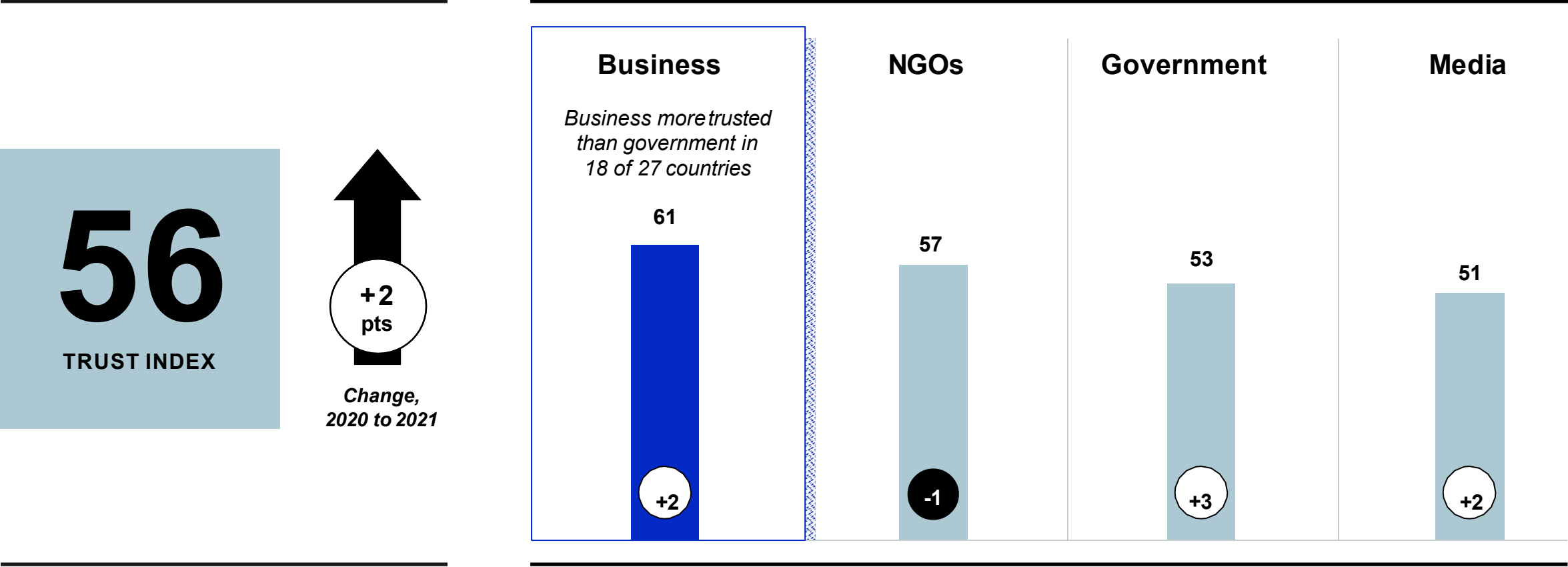
2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt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





# BUSINESS BECOMES ONLY TRUSTED INSTITUTION

Percent trust



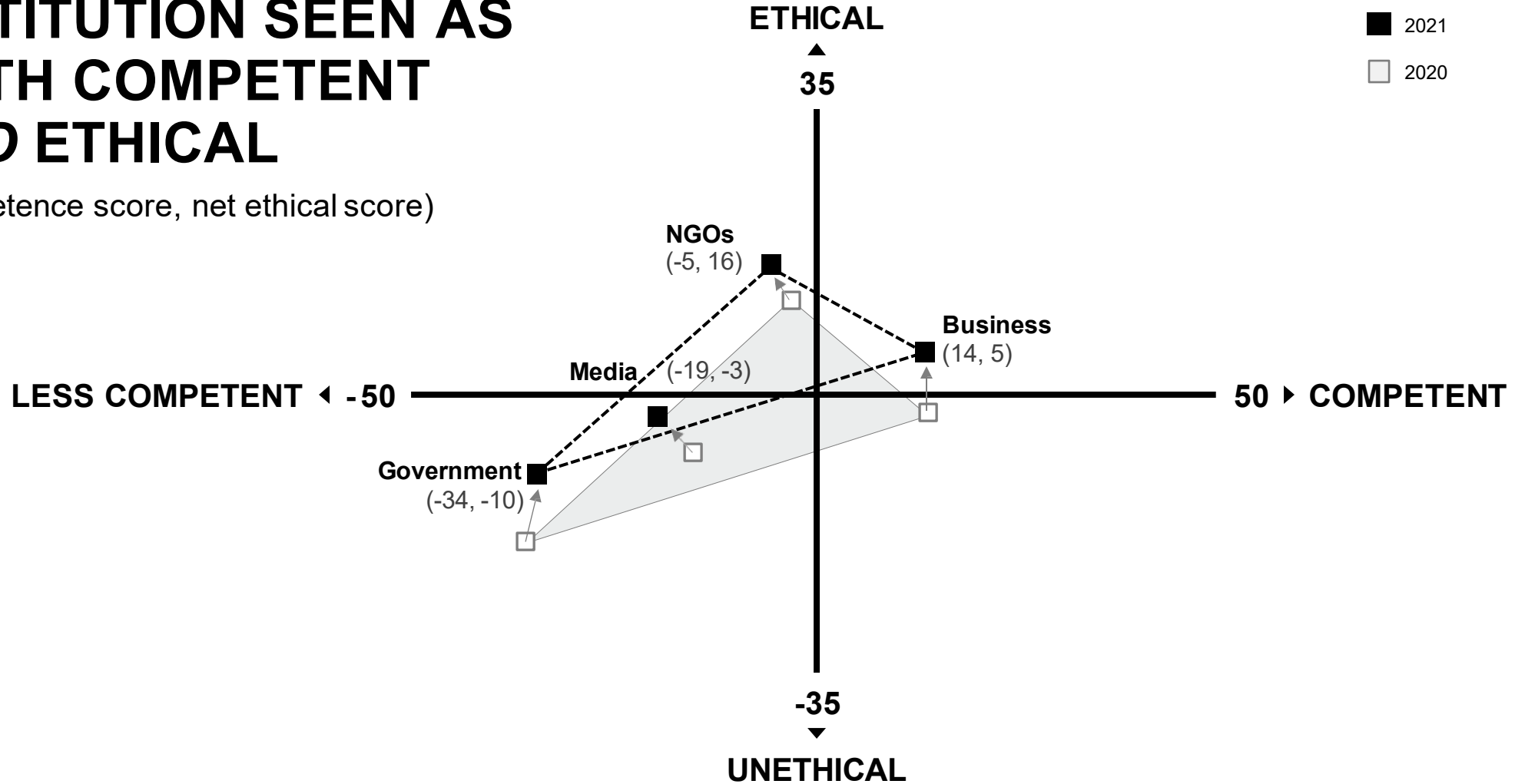
2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt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





# BUSINESS NOW ONLY INSTITUTION SEEN AS BOTH COMPETENT *AND* ETHICAL

(Competence score, net ethical score)



**2021 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, 24-mkt avg. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.



# TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

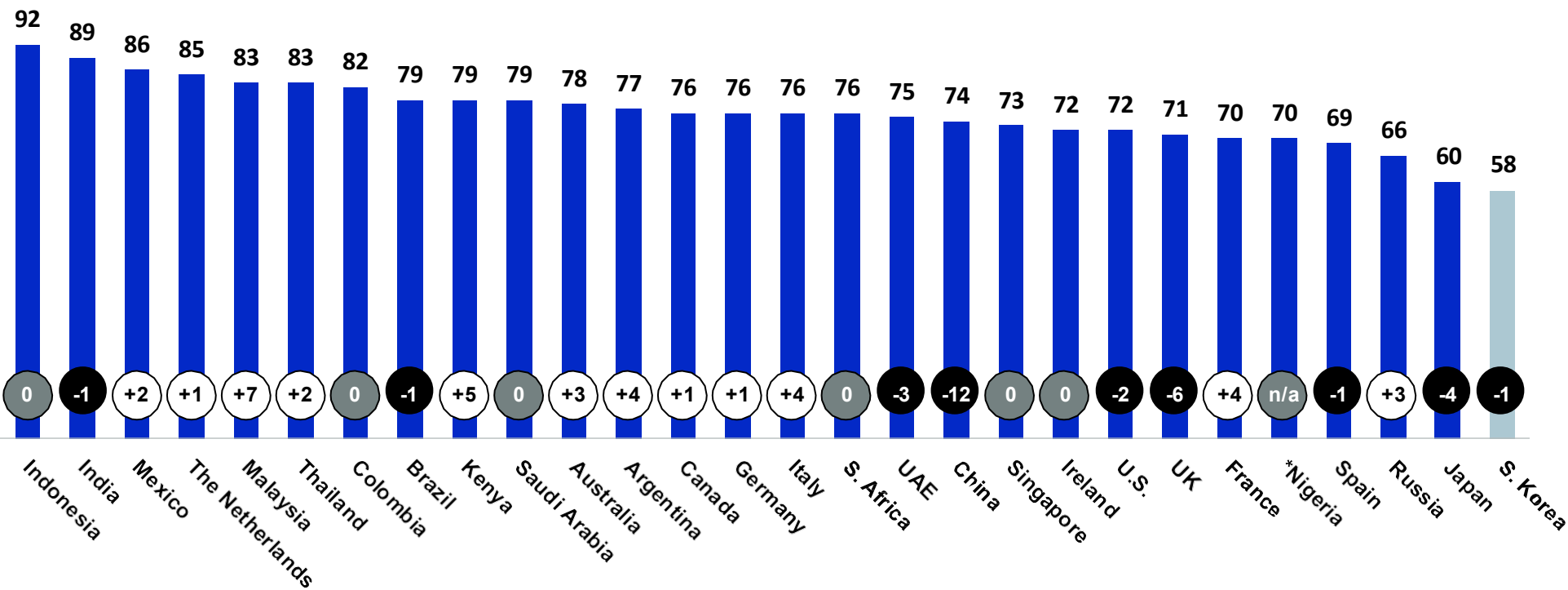
Percent trust in my employer



Global 27



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



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, 27-mkt avg. Question asked among those who are employed (Q43/1).  
\*Nigeria not included in the global average



# A TRUST RECKONING FOR CHINA AND THE U.S.

## 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

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

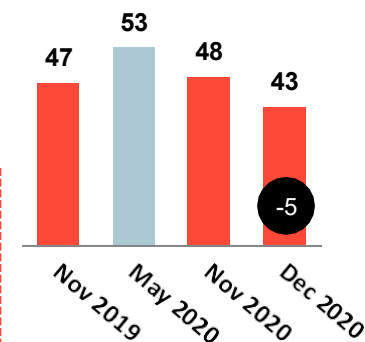
## 2021 General population

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

## YtY Change

Record year-over-year decline in China's Trust Index

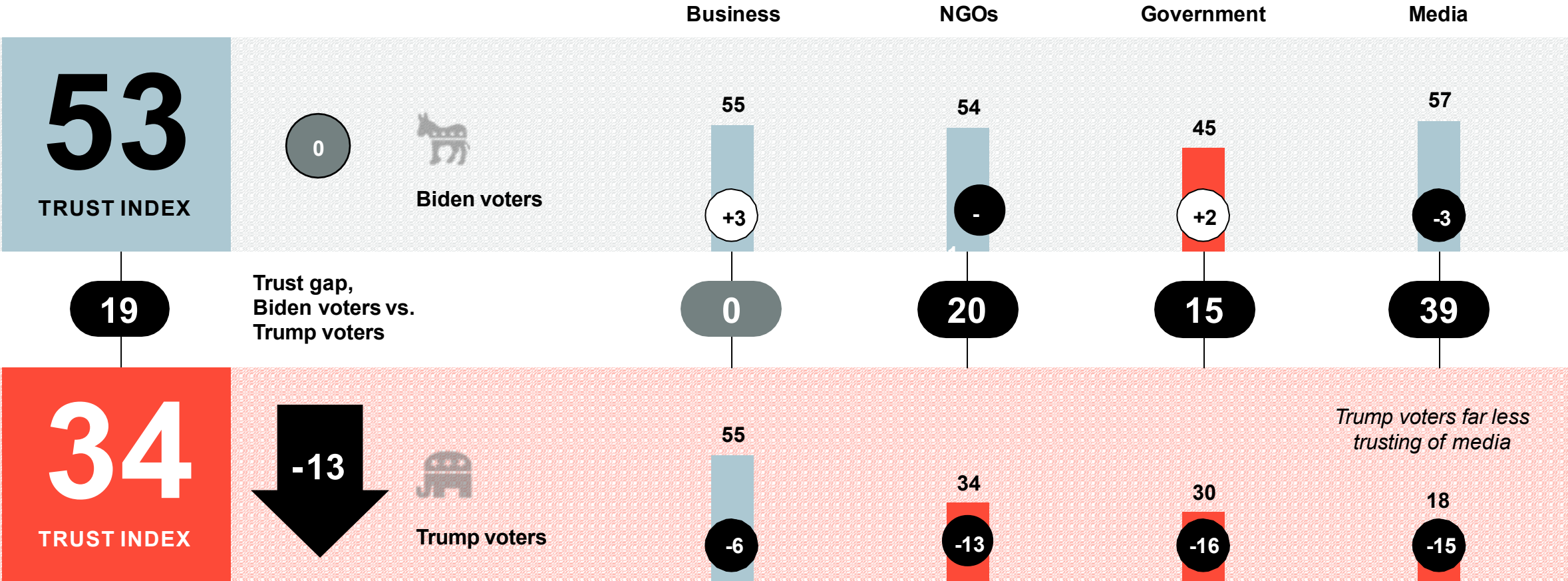
## U.S. Trust Index





# TRUST CRASHES AMONG TRUMP VOTERS POST U.S. ELECTION

Percent trust among Biden and Trump voters in the 2020 U.S. Presidential election, and change from November to December



2021 Edelman Trust Barometer U.S. Post-Election Supplement. 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. VOTE. Whom did you vote for in the 2020 United States Presidential election? General population, U.S. among respondents that intended to vote for or did vote for Biden or Trump.

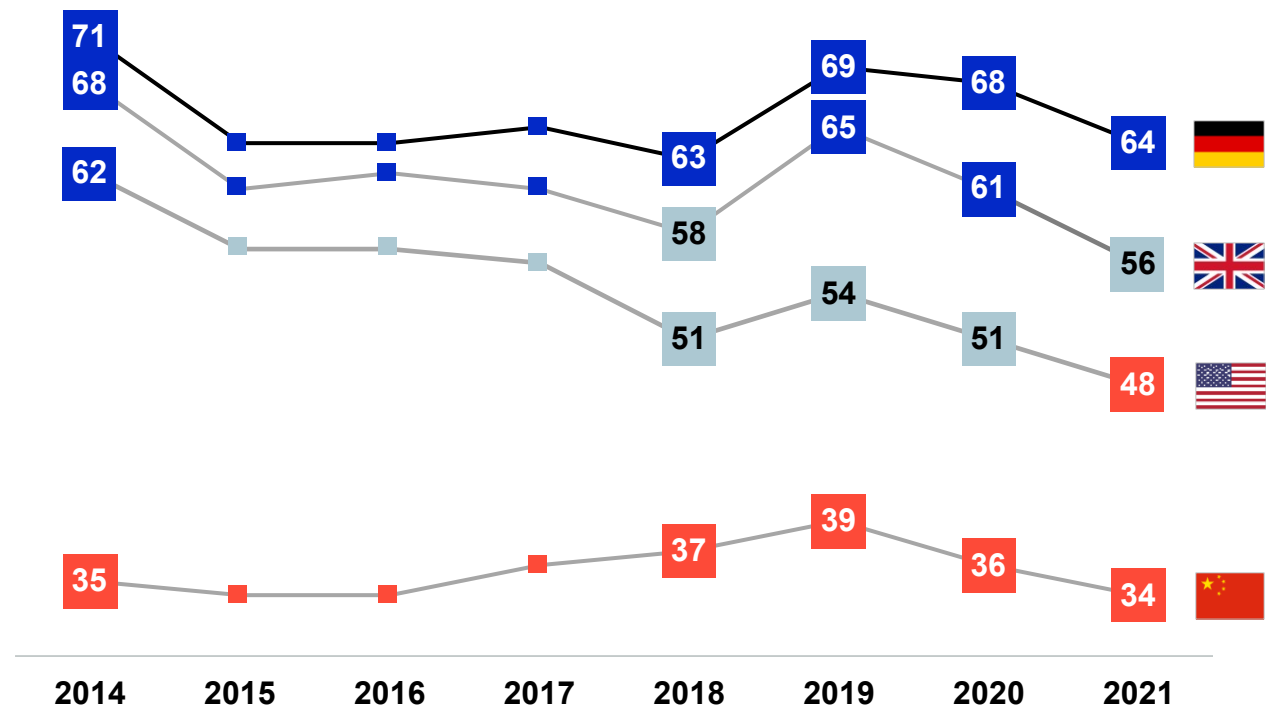




# MOST POWERFUL COUNTRIES LOSE TRUST CAPITAL

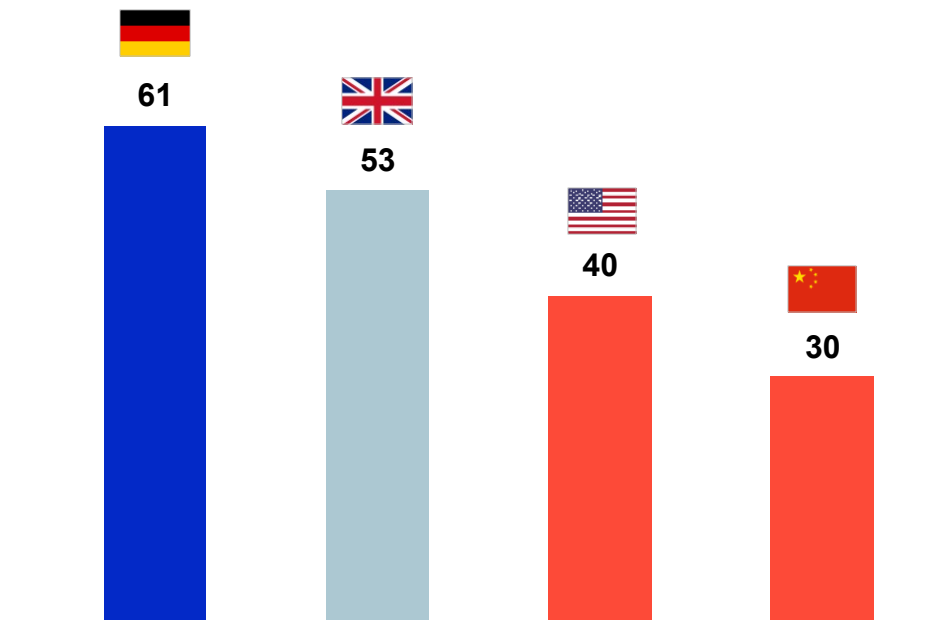
Percent trust in **companies** headquartered in each country

Global 22



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

Global 27

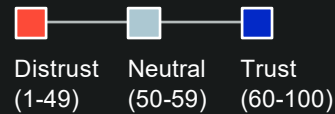


2021 Edelman Trust Barometer. TRU\_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg. 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, 27-mkt avg.



# 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	Global 27
68	India
86	Saudi Arabia
86	Indonesia
83	China
82	The Netherlands
79	UAE
78	Malaysia
77	Australia
76	Singapore
75	Thailand
66	Italy
66	Mexico
65	France
65	Kenya
65	S. Africa
64	Canada
63	Ireland
62	Brazil
62	Germany
62	U.S.
59	Colombia
59	S. Korea
59	UK
57	Spain
56	Argentina
52	Japan
52	Nigeria*
41	Russia

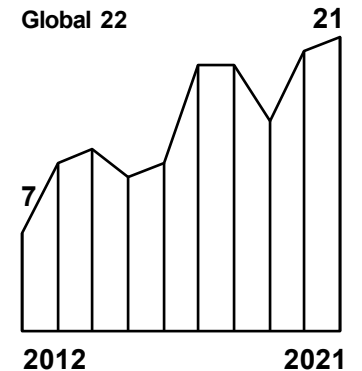
## 2021 Mass population Trust gap

2021	Global 27	Trust gap
52	China	16
68	Indonesia	14
68	India	15
67	Saudi Arabia	19
67	Singapore	19
66	UAE	10
65	Malaysia	14
63	The Netherlands	15
62	Kenya	17
58	Mexico	7
56	Thailand	10
56	Australia	19
55	Canada	22
55	Germany	9
52	Italy	10
51	Nigeria*	15
49	Ireland	3
48	Brazil	15
47	Colombia	13
46	France	20
45	Argentina	12
44	S. Africa	21
44	Spain	13
44	U.S.	18
43	S. Korea	16
43	UK	16
39	Japan	13
28	Russia	13

Record trust inequality

## DOUBLE-DIGIT TRUST INEQUALITY IN RECORD NUMBER OF COUNTRIES

Nr. of countries with double-digit trust inequality







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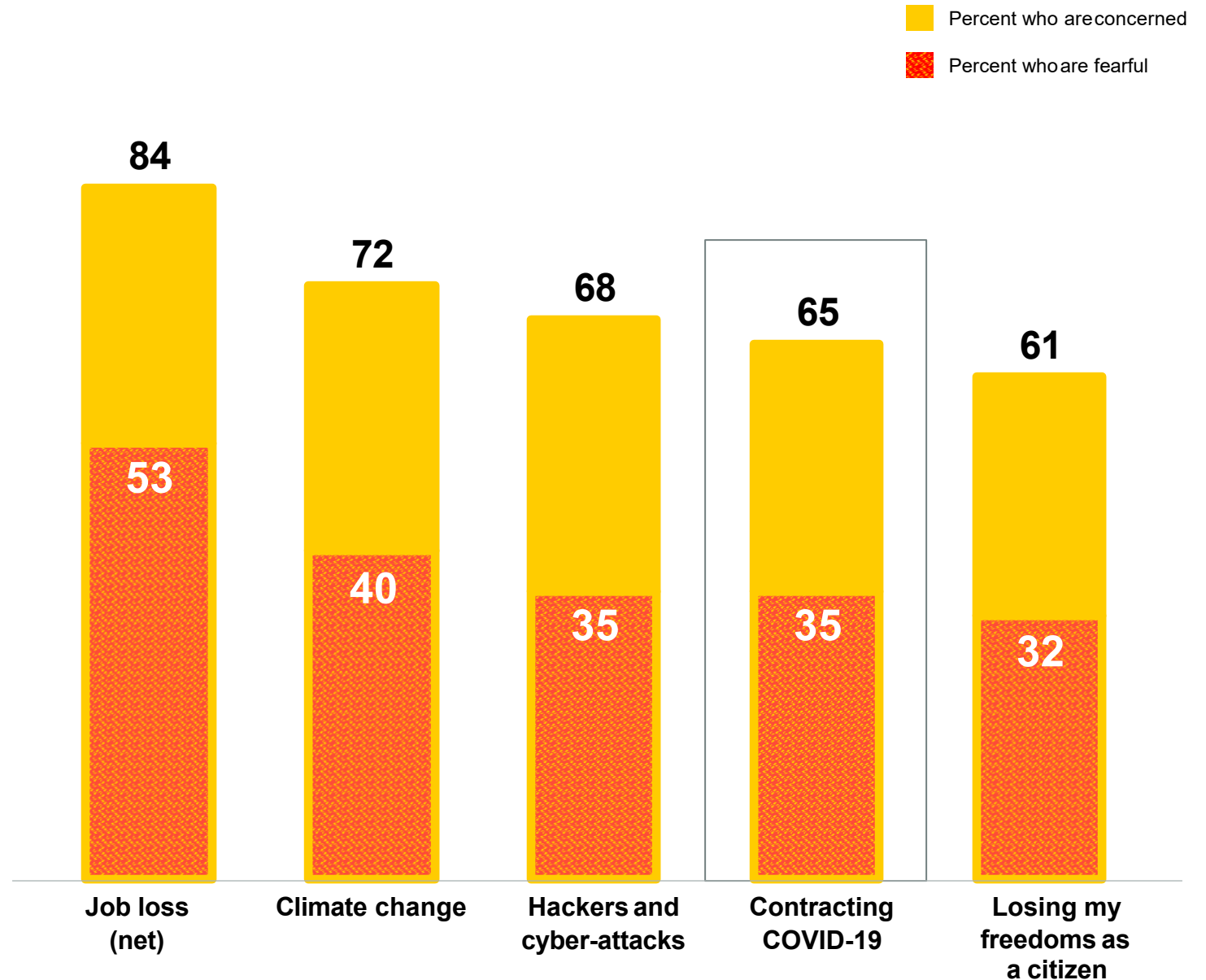
# PANDEMIC FURTHER FUELS FEARS

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# PANDEMIC ADDED TO PERSISTENT PERSONAL AND SOCIETAL FEARS

Percent who are concerned,  
and percent who are fearful



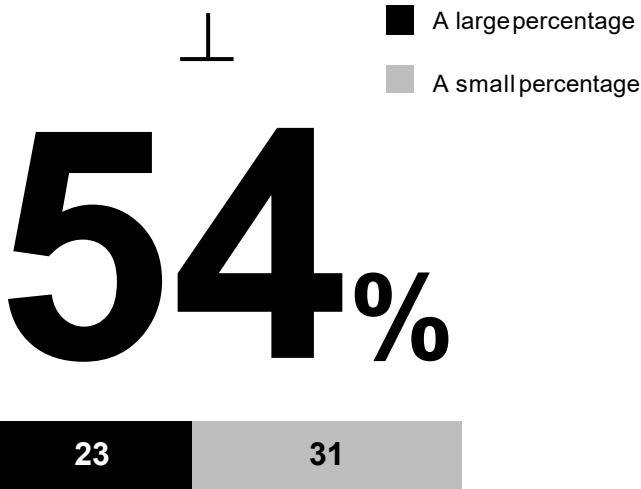
2021 Edelman Trust Barometer. POP\_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry; top 2 box, fear. Non-job loss attributes shown to half of the sample. General population, 27-mkt avg. Job loss asked of those who are an employee (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.



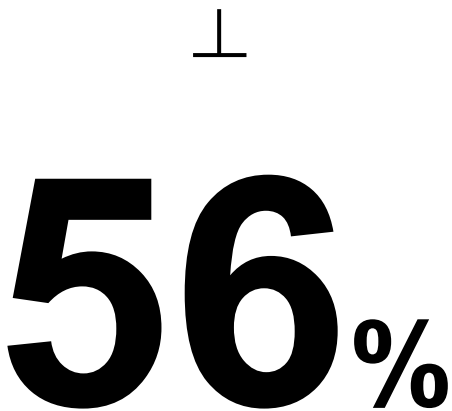
# PANDEMIC ACCELERATES JOB LOSS FEARS

Percent who agree

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, 27 -mkt avg.





# 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, 27-mkt avg. Net change is the difference between more and less important.

<i>Change in importance since last year</i>	Net change	<i>More Important</i>	<i>Less Important</i>
Improving our <b>healthcare system</b>	<b>+62</b>	70	8
Addressing <b>poverty</b> in this country	<b>+53</b>	62	9
Improving our <b>education system</b>	<b>+53</b>	62	9
Addressing <b>climate change</b>	<b>+51</b>	61	10
Finding ways to combat <b>fake news</b>	<b>+50</b>	60	10
Protecting people's <b>individual freedoms</b>	<b>+50</b>	59	9
Closing the <b>economic and social divide</b>	<b>+48</b>	58	10
Addressing <b>discrimination and racism</b>	<b>+42</b>	53	11



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# CRISIS OF LEADERSHIP

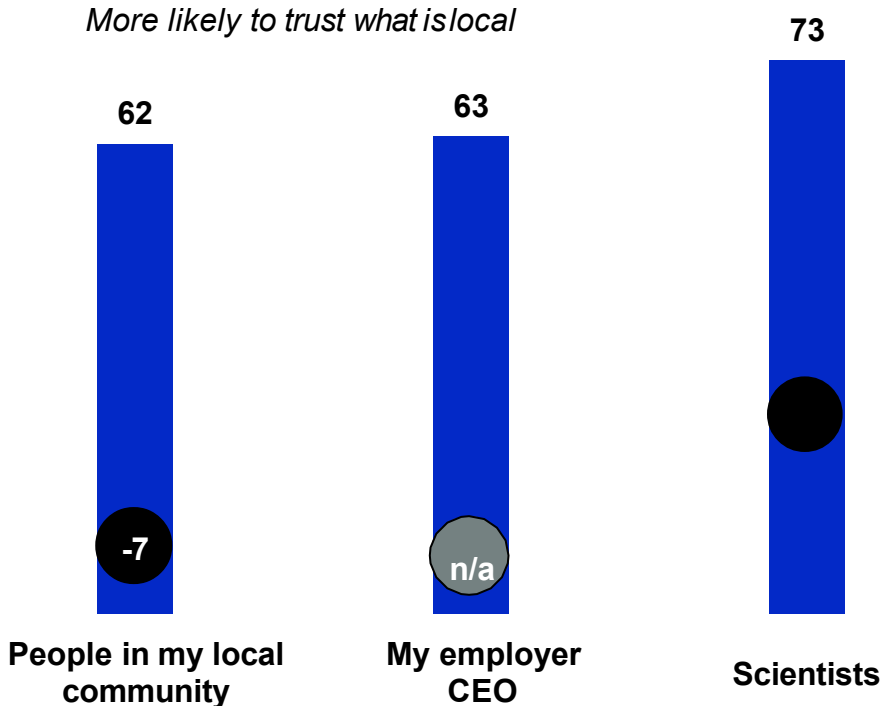
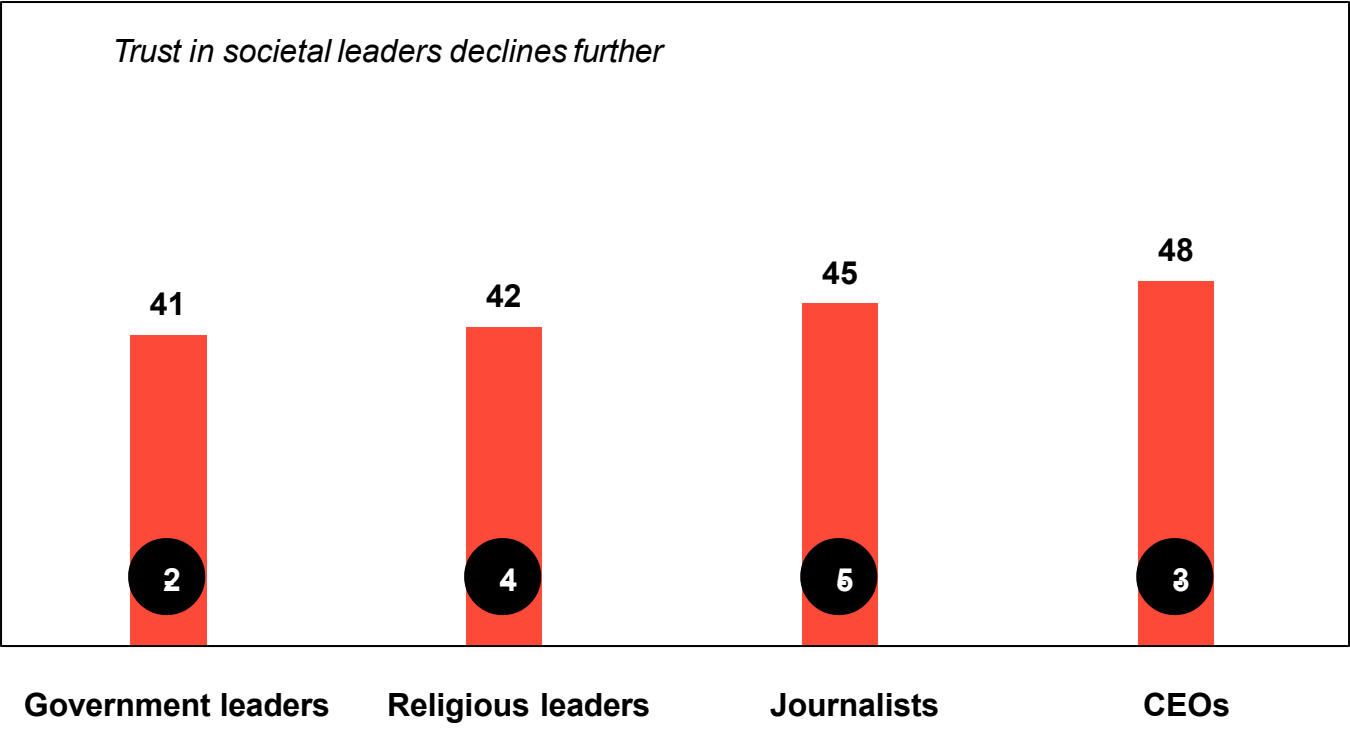
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# SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust



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, 27-mkt avg.





# SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Percent who worry

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

└

**57%**

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

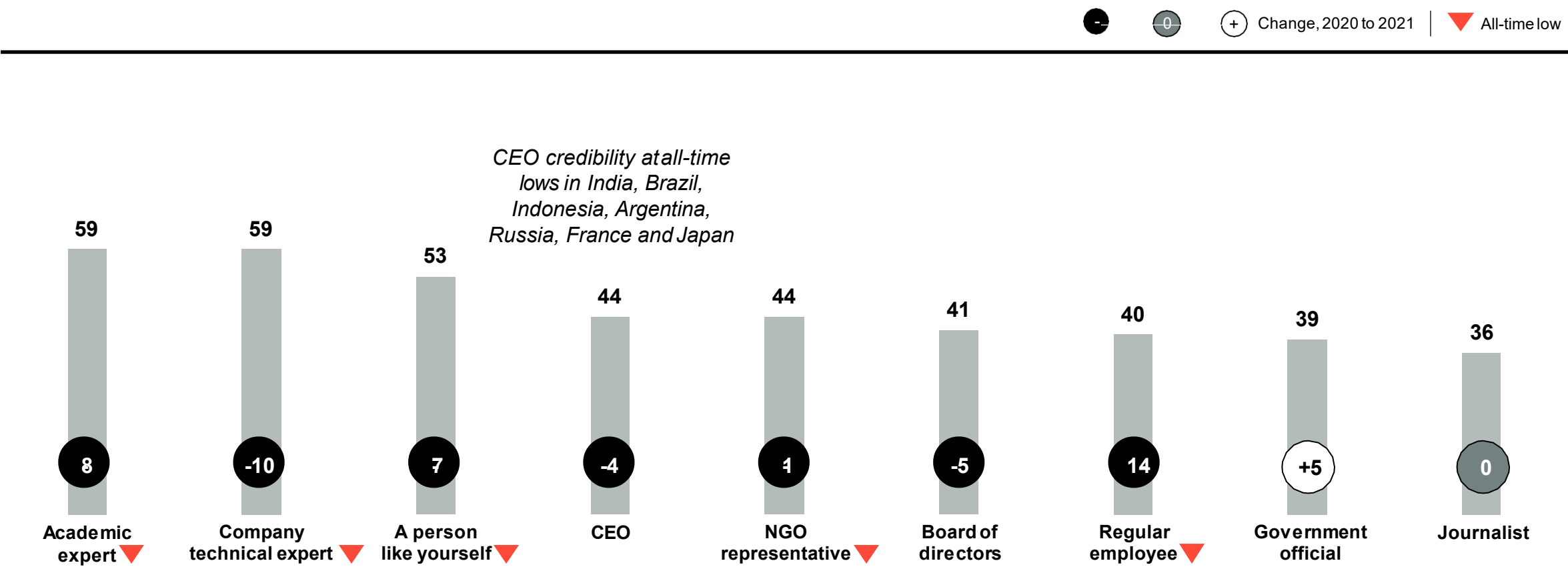
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**56%**



# SPOKESPEOPLE LOSE CREDIBILITY

Percent who rate each as very/extremely credible  
as a source of information about a company





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# RAGING INFODEMIC FEEDS MISTRUST

└

NO VACCINE

NEEDED

I HAVE



AN

IMMUNE  
SYSTEM

MY BODY

MY CHOICE

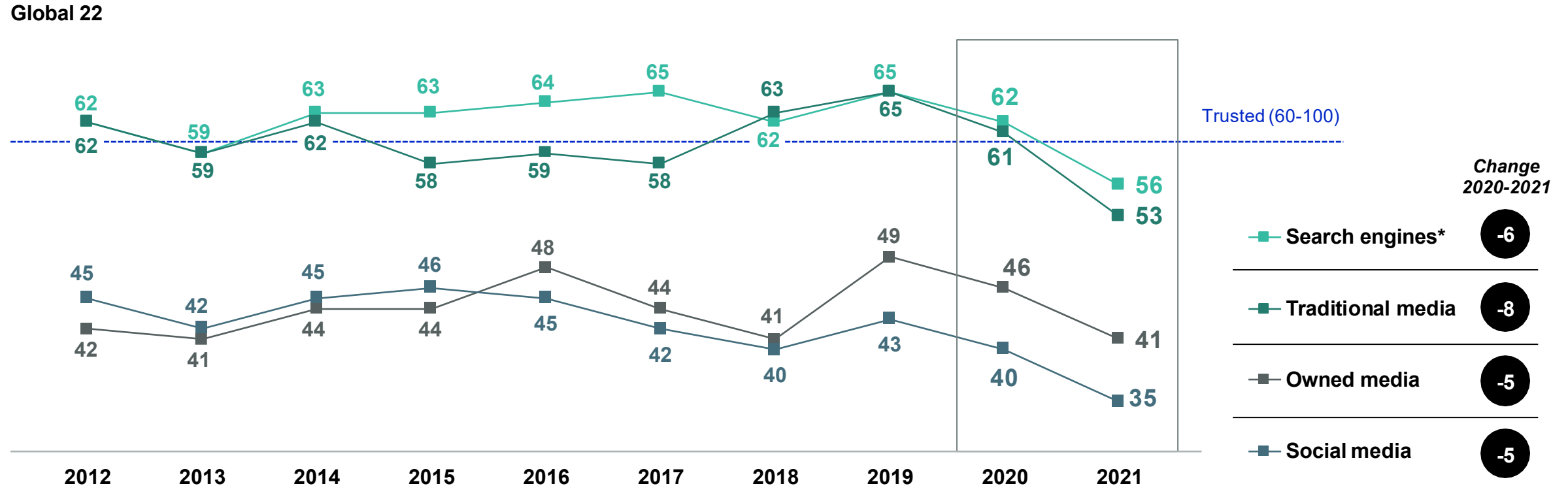
FAKE

NEWS  
RTE



# TRUST IN ALL INFORMATION SOURCES AT RECORD LOWS

Percent trust in each source for general news and information



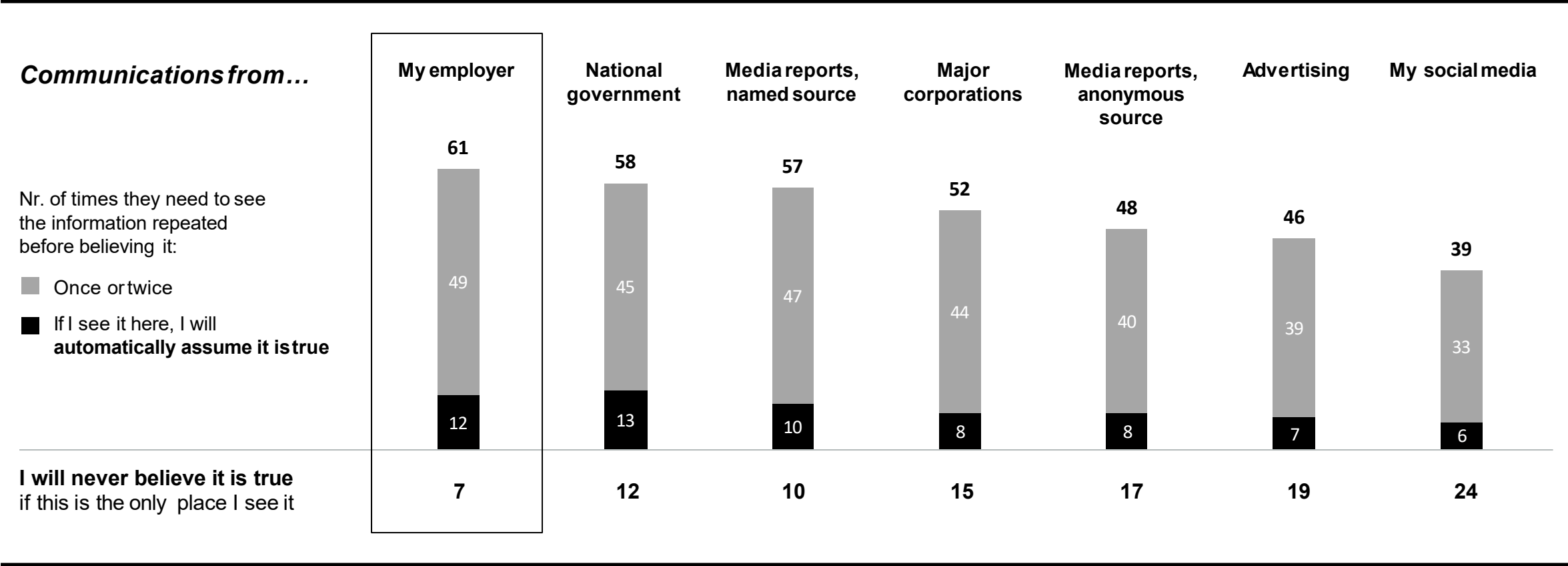
2021 Edelman Trust Barometer. COM\_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg.

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



# EMPLOYER MEDIA MOST BELIEVABLE

Percent who believe information from each source automatically, or after seeing it twice or less





# PRIORITIES SHIFT: MY INFORMATION LITERACY NOW MATTERS MORE

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

2021 Edelman Trust Barometer. IMP\_VALUES. For each of the following, please indicate whether 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. Question asked of half of the sample. General population, 27-mkt avg. Net change is the difference between more and less important.

<i>Change in importance since the start of the year...</i>	Net change	<i>More Important</i>	<i>Less Important</i>
Prioritizing my family and their needs	<b>+56</b>	64	8
Increasing my <b>media and information literacy</b>	<b>+46</b>	55	9
Increasing my <b>science literacy</b>	<b>+43</b>	52	9
Being politically aware	<b>+39</b>	51	12
Speaking out when I see the need for changes and reforms	<b>+36</b>	47	11





⊥

# HIGH STAKES FOR PUBLIC HEALTH AND THE ECONOMY

⊥



# VACCINE HESITANCY REMAINS A MAJOR HURDLE

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

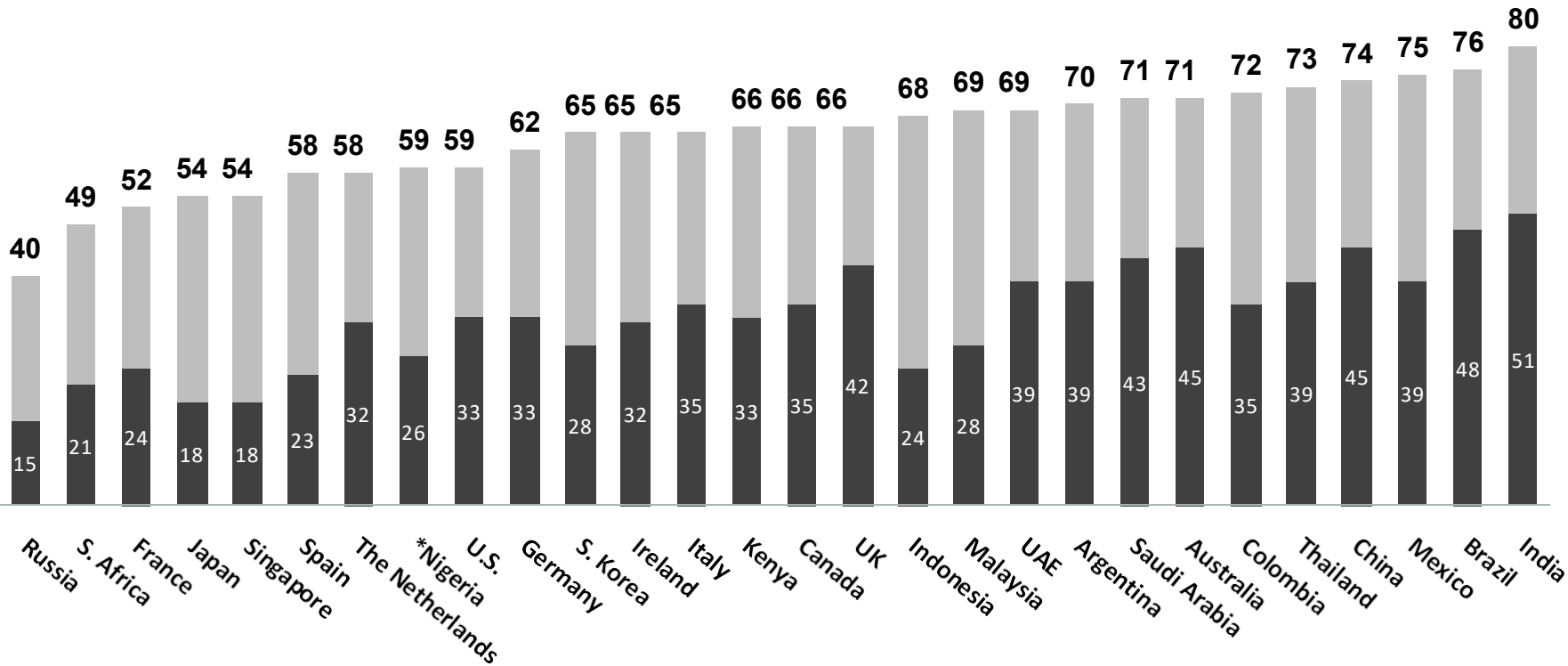
Global 27

64%

Willing to vaccinate...

31	Six months to one year
33	As soon as possible

Only 1 in 3 ready to take the vaccine as soon as possible



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, with in a year. Question asked of half of the sample. General population, 27-mkt avg.  
\*Nigeria not included in the global average



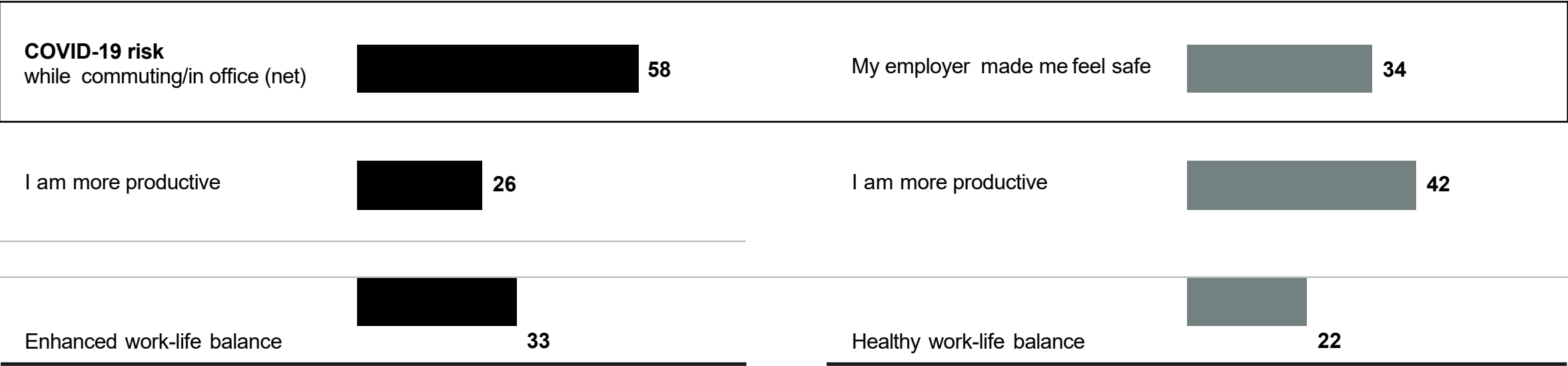


# PANDEMIC FEARS IMPEDE RETURN TO WORKPLACE

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

52% choosing to **work at home**,  
for the following reasons:

48% choosing to **return to the office**,  
for the following reasons:



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, 27-mkt avg. COVID-19 risk while commuting / in office is a net of WHY\_HOME/2-3.







# A NEW MANDATE FOR BUSINESS



# BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Percent who agree

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

⊥  
**68%**

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

⊥  
**66%**

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

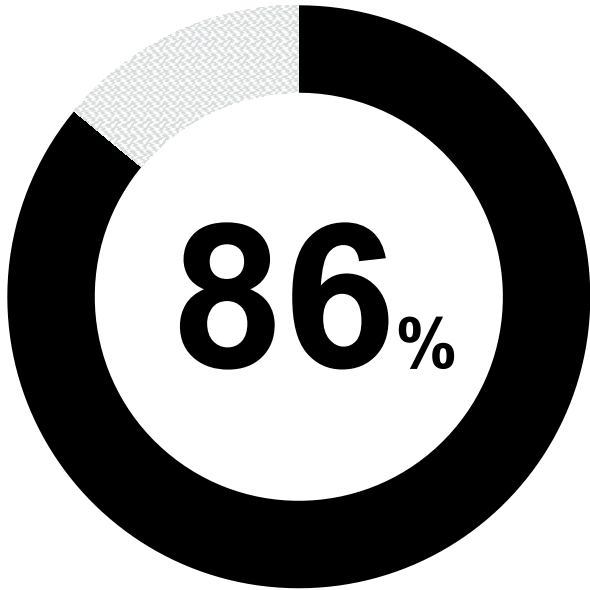
⊥  
**65%**

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, 27-mkt avg.



# CEOS MUST LEAD ON SOCIETAL ISSUES

I expect **CEOs to publicly speak out** about one or more of these societal challenges



—

Pandemic impact	59
Job automation	51
Societal issues	43
Local community issues	40



# BUSINESS GAINS THE MOST TRUST BY BEING A GUARDIAN OF INFORMATION QUALITY

Percent increased likelihood of trusting business associated with performing well on each action

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<i>When these actions are performed well...</i>	Increased likelihood of trust
<b>Guarding information quality</b>	<b>+5.8%</b>
Embracing sustainable practices	<b>+5.7%</b>
Robust COVID-19 health and safety response	<b>+4.8%</b>
Driving economic prosperity	<b>+4.7%</b>
Long-term thinking over short-term profits	<b>+4.6%</b>



# 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, 27-mkt avg. Net change is the difference between more and less important.

<i>Change in importance as an employer attribute since the start of the year...</i>	Net change	More Important	Less Important
<b>Keep workers, customers safe</b>	<b>+49</b>	59	10
<b>Job skills training programs</b>	<b>+44</b>	54	10
<b>Regular employee communications</b>	<b>+44</b>	54	10
<b>Diverse, representative workforce</b>	<b>+39</b>	50	11



# CONSUMERS AND EMPLOYEES EXPECTED TO HAVE A SEAT AT THE TABLE

Percent who agree

68%

Consumers ...

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

62%

Employees ...

50% 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**



# EMERGING FROM INFORMATION BANKRUPTCY

1

## **Business: Embrace expanded mandate**

*CEOs must lead on issues from sustainability and systemic racism 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.*

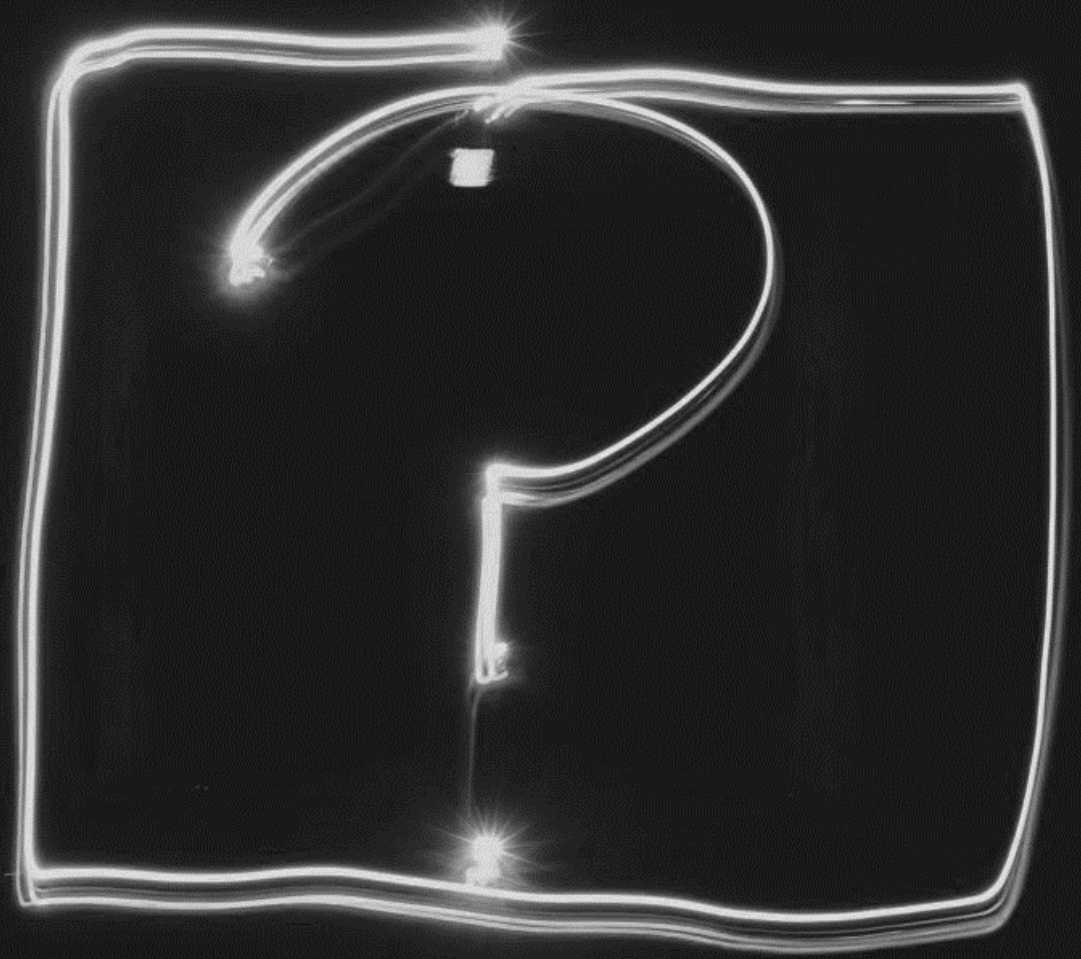
5

## **Regain trust**

*Businesses can earn trust from their employees and consumers through education opportunities, beyond the boundary of their own requirements.*



**QUESTIONS?**





# Coming up .....

13<sup>th</sup> May – Technology Forum



8<sup>th</sup> July – fastTrack Forum



4<sup>th</sup> – 6<sup>th</sup> October – Annual conference





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