2023 Edelman Trust Barometer

Methodology

Annual online survey in its 23rd year

Fieldwork conducted: Nov 1 – Nov 28, 2022

28 Countries
32,000+ Respondents
1,150+- Respondents per country**

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

Russia, part of the Edelman Trust Barometer from 2007 to 2022, was not included in this wave

Global averages

These vary based on the number of countries surveyed each year:

GLOBAL 27

*To protect the stability of the global average, Sweden will not be included in the average until there are at least two years of recent data

GLOBAL 25 Excludes China and Thailand

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

Statistical significance

All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level

For more details on global averages and country-specific methodology, please refer to the Technical Appendix

Due to a translation inconsistency, the France data measuring trust in government, as well as competence and ethics was removed from certain slides. For more details contact the Trust Barometer research team
Why Trust matters?

Trusted organizations are better prepared against risk, more resilient in the face of crisis, and better equipped to unlock the full potential of their corporate, consumer and employer brand across all their audiences.

1. ADVOCATES
   Trusted organizations have stronger advocates

2. EMPLOYERS
   Trust drives workplace recommendations

3. REGULATORS
   Trusted organizations have greater license to operate

4. INVESTORS
   Trusted organizations are more likely to receive institutional investment

5. RESILIENCE AGAINST RISK
   Trusted organizations are more resilient in the face of crisis

6. MARKET
   Trusted organizations outperform their respective sectors

7. MEDIA COVERAGE
   Trusted organizations are more immune to the media cycle
Trust Index: Trust Remains High in the UAE, and Stable Globally Despite Economic Headwinds

UAE consistently ranked as highly trusted country

Trust Index (the average percent trust in NGOs, business, government and media)

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

Significant change

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2023 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, 25-mkt avg. *Sweden is not included in the global average.

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Navigating A Polarized World
Forces That Lead To Global Polarization

Economic Anxieties
Economic optimism is collapsing around the world, with 24 of 28 countries seeing all-time lows in the number of people who think their families will be better off in five years.

Institutional Imbalance
Business is now the sole institution seen as competent and ethical; government is viewed as unethical and incompetent. Business is under pressure to step into the void left by government.

Mass-Class Divide
People in the top quartile of income live in a different trust reality than those in the bottom quartile.

The Battle for Truth
A shared media environment has given way to echo chambers, making it harder to collaboratively solve problems. Media is not trusted, with especially low trust in social media.
Polarization Most Severe When Deep Divisions Become Entrenched

- **Severely polarized**: I see deep divisions, and I don't think we’ll ever get past them.
- **Moderately polarized**: I see deep divisions but I think they might be addressable.
- **Less polarized**: I see few deep divisions.

My country is very/extremely divided... and I do not feel these divisions can be overcome.
UAE A Highly Unified Country

2023 Edelman Trust Barometer. POL_DEG. Using the scale below, please indicate how divided on key societal issues you believe your country is today. 5-point scale: top 2 box, very/extremely divided. POL_PROG. How likely or unlikely do you think it is that your country will be able to work through or overcome its ideological divisions and lack of agreement on key issues and challenges? 8-point scale; codes 2-5, divisions can't be overcome. General population, by market. Data for “entrenched” is POL_PROG/2-5 filtered by those who feel their country is very/extremely divided (POL_DEG/4-5). All data is rebased to exclude those that said, “don’t know.”

Entrenched...

and I do not feel these divisions can be overcome
In the UAE, Business, Government and NGOs are Seen As Competent and Ethical

(Competence score, net ethical score)
When Prompted, People Made Clear They Think About…

Percent in the UAE

<table>
<thead>
<tr>
<th>Personal economic fears</th>
<th>Existential societal fears</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job loss (net)</td>
<td>Inflation</td>
</tr>
<tr>
<td>90</td>
<td>67</td>
</tr>
<tr>
<td>Climate change</td>
<td>Food shortages</td>
</tr>
<tr>
<td>74</td>
<td>67</td>
</tr>
<tr>
<td>Food shortages</td>
<td>Nuclear war</td>
</tr>
<tr>
<td>67</td>
<td>65</td>
</tr>
<tr>
<td>Nuclear war</td>
<td>Energy shortages</td>
</tr>
<tr>
<td>65</td>
<td>60</td>
</tr>
</tbody>
</table>

9-point scale; top 4 box, worry. Some attributes asked of half of the sample.

General population, UAE. 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.
My family and I will be better off in five years

2019 | 2023
---|---
53 | 50
40 | 

Change, 2022 to 2023: -10 pts

24 of 28 countries at all-time lows

Developed countries

GLOBAL 24

CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years’ time? 5-point scale; top 2 box, better off. General population, 24-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.
In the UAE, All Institutions Trusted

Percent trust

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

Government

<table>
<thead>
<tr>
<th>Institution</th>
<th>Trusting Country</th>
<th>Trust</th>
<th>Distrusting Country</th>
<th>Distrust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>Japan</td>
<td>33</td>
<td>S. Africa</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Spain</td>
<td>49</td>
<td>Japan</td>
<td>47</td>
</tr>
</tbody>
</table>

Business

<table>
<thead>
<tr>
<th>Institution</th>
<th>Trusting Country</th>
<th>Trust</th>
<th>Distrusting Country</th>
<th>Distrust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td><em>Sweden</em></td>
<td>44</td>
<td>Germany</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>UK</td>
<td>37</td>
<td>Japan</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>S. Korea</td>
<td>38</td>
<td>S. Korea</td>
<td>27</td>
</tr>
</tbody>
</table>

NGOs

<table>
<thead>
<tr>
<th>Institution</th>
<th>Trusting Country</th>
<th>Trust</th>
<th>Distrusting Country</th>
<th>Distrust</th>
</tr>
</thead>
<tbody>
<tr>
<td>NGOs</td>
<td>Japan</td>
<td>47</td>
<td>S. Korea</td>
<td>38</td>
</tr>
</tbody>
</table>

Media

<table>
<thead>
<tr>
<th>Institution</th>
<th>Trusting Country</th>
<th>Trust</th>
<th>Distrusting Country</th>
<th>Distrust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media</td>
<td>Japan</td>
<td>34</td>
<td>S. Korea</td>
<td>27</td>
</tr>
</tbody>
</table>

Least-trusting countries for each institution:

- Government: Japan, S. Africa, Argentina
- Business: *Sweden*, Japan, Germany, S. Korea
- NGOs: Japan, S. Korea
- Media: Japan, S. Korea

Note: Sweden is not included in the global average. Due to a translation inconsistency, the France data was removed from this slide. For more details contact the Trust Barometer research team.
In the UAE, Institutional Leaders Trusted

Percent trust, in the UAE

<table>
<thead>
<tr>
<th>Group</th>
<th>Trust (60-100)</th>
<th>Neutral (50-59)</th>
<th>Distrust (1-49)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journalists</td>
<td>61</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CEOs</td>
<td>68</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My neighbors</td>
<td>70</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government leaders</td>
<td>71</td>
<td></td>
<td></td>
</tr>
<tr>
<td>People in my local community</td>
<td>72</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My CEO</td>
<td>76</td>
<td></td>
<td></td>
</tr>
<tr>
<td>My coworkers</td>
<td>76</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Citizens of my country</td>
<td>78</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scientists</td>
<td>84</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Institutions Seen as Reliable Sources of Information in the UAE

Percent who say

These institutions are a reliable source of trustworthy information

GLOBAL 25
Excludes China and Thailand

UAE

GLOBAL 26

Media
NGOs
Business
Government

42
46
51
49
48
53
39
59

11-point scale; top 5 box, positive; bottom 5 box, negative. Media and NGOs shown to half of the sample. General population, UAE, 25-55 avg. Data not collected in China and Thailand.
The Power of Brands Create a Shared Identity

Brands celebrating what brings us together and emphasizing our common interest strengthen the social fabric

 Percent who say

68%
Expectations for Business and CEOs
In the UAE, CEOs Most Expected To Act on Employees, Discrimination, and Climate

Percent who say, in the UAE

I expect CEOs to take a public stand on this issue:

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treatment of employees</td>
<td>84</td>
</tr>
<tr>
<td>Discrimination</td>
<td>81</td>
</tr>
<tr>
<td>Climate change</td>
<td>79</td>
</tr>
<tr>
<td>Wealth gap</td>
<td>77</td>
</tr>
<tr>
<td>Immigration</td>
<td>69</td>
</tr>
</tbody>
</table>

2023 Edelman Trust Barometer. CEO_ISS_EXP. For each of the following issues, please indicate what you expect CEOs to do. 3-point scale; code 1, publicly take a stand; code 2, take a stand and use resources. Question asked of half of the sample. General population, UAE. Data is rebased to exclude those that said, “don’t know,” and showing the sum of codes 1 and 2.
Want More Societal Engagement from Business, Not Less

Percent who say, in the UAE

On addressing each societal issue, business is

<table>
<thead>
<tr>
<th>Issue</th>
<th>Multiplier not doing enough vs overstepping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Climate change</td>
<td>3.5x</td>
</tr>
<tr>
<td>Economic inequality</td>
<td>2.5x</td>
</tr>
<tr>
<td>Energy shortages</td>
<td>2.5x</td>
</tr>
<tr>
<td>Trustworthy information</td>
<td>2.5x</td>
</tr>
<tr>
<td>Workforce reskilling</td>
<td>2.5x</td>
</tr>
<tr>
<td>Healthcare access</td>
<td>2x</td>
</tr>
</tbody>
</table>

For each issue, respondents were asked to rate whether business was doing too much (overstepping), doing the right amount, or not doing enough. The multipliers are rounded to the nearest .5.

Source: 2023 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, UAE. The multipliers are rounded to the nearest .5.
ACTION LEADS TO TRUST
Navigating a Polarized World

1. **Maintain economic optimism**
   Maintain the high economic optimism seen in the UAE through collaboration, and by acting competently and ethically.

2. **Advocate for truth**
   Institutions have an essential role to play in the information ecosystem. Be a source of reliable information, and hold false information sources accountable through corrective messaging, reinvestment, and other action.

3. **Business must continue to contribute**
   As a trusted institution, business holds the mantle of expectation and responsibility. Leverage comparative advantage to inform debate and deliver solutions across climate, diversity and inclusion, and skill training.

4. **Collaborate with government**
   The best results come when business and government work together, not independently. Build consensus and collaborate on policies and standards to deliver results that push us toward a secure and thriving society.
END