



**2024
Edelman
Trust
Barometer**

Special Report:

**Brands
and Politics**

↘ **Edelman** Trust Institute

2024 Edelman Trust Barometer Special Report: Brands and Politics

Methodology

6th annual online survey on trust and brands

Fieldwork conducted: Apr 13 – 24, 2024

15

Countries

15,000

Respondents

1,000+/-

Respondents per country**

Brazil	France	Indonesia*	Saudi Arabia	UAE
Canada	Germany	Japan	S. Africa	UK
China	India	Mexico	S. Korea	U.S.

Data collected is representative of the general population across age, gender, region and ethnicity/nationality (where applicable) within each country

**The sample size varies by country from 955 to 1,002
 14-market global data margin of error: General population +/- 1.1 percentage points (n=14,957)
 Country-specific data margin of error: General population +/- 4.1 to 4.2 percentage points (varies by country based on sample size, n=955 to n=1,002)
 Margin of error is calculated at the 99% confidence level

Global averages

Unless otherwise indicated, global averages are composed of 14 of 15 countries surveyed.

*Indonesia is excluded from all global averages.

Statistical significance



Indicates a statistically meaningful difference or change in the data that is unlikely to be due to chance or a random fluctuation.

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

Shortened question text

Throughout the report, question text has been edited for readability.

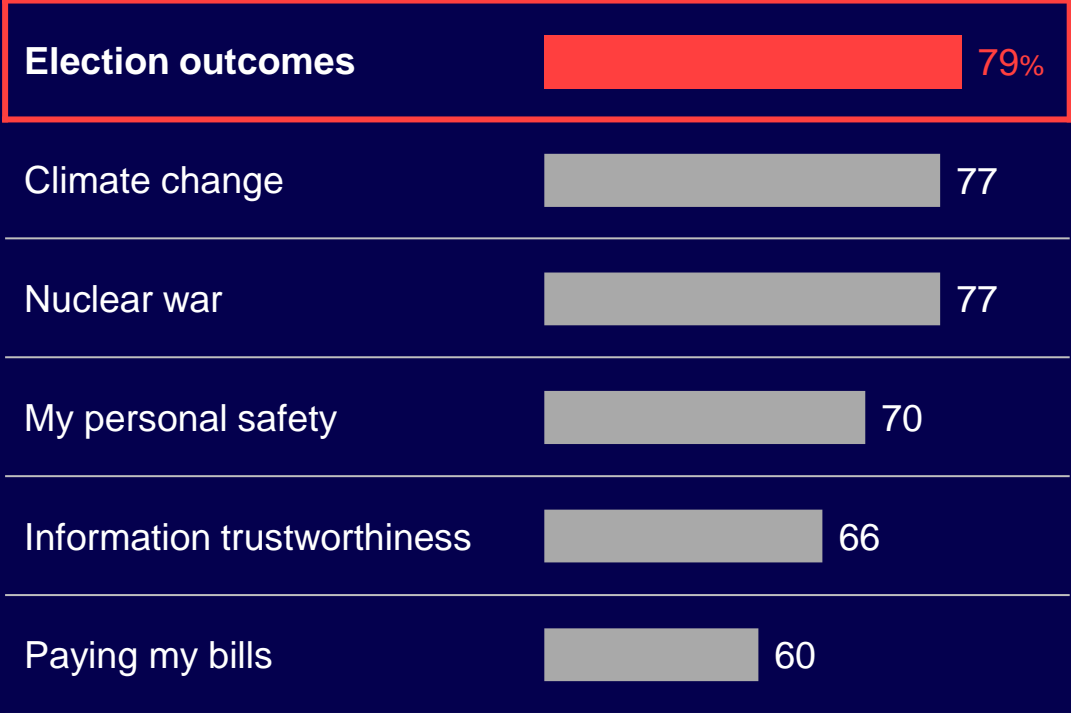
For more details on global averages, country-specific sample information, or to see the full text for any shortened statements, please see the Technical Appendix

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Concern Over Election Outcomes Tops Societal Fears

I worry about...

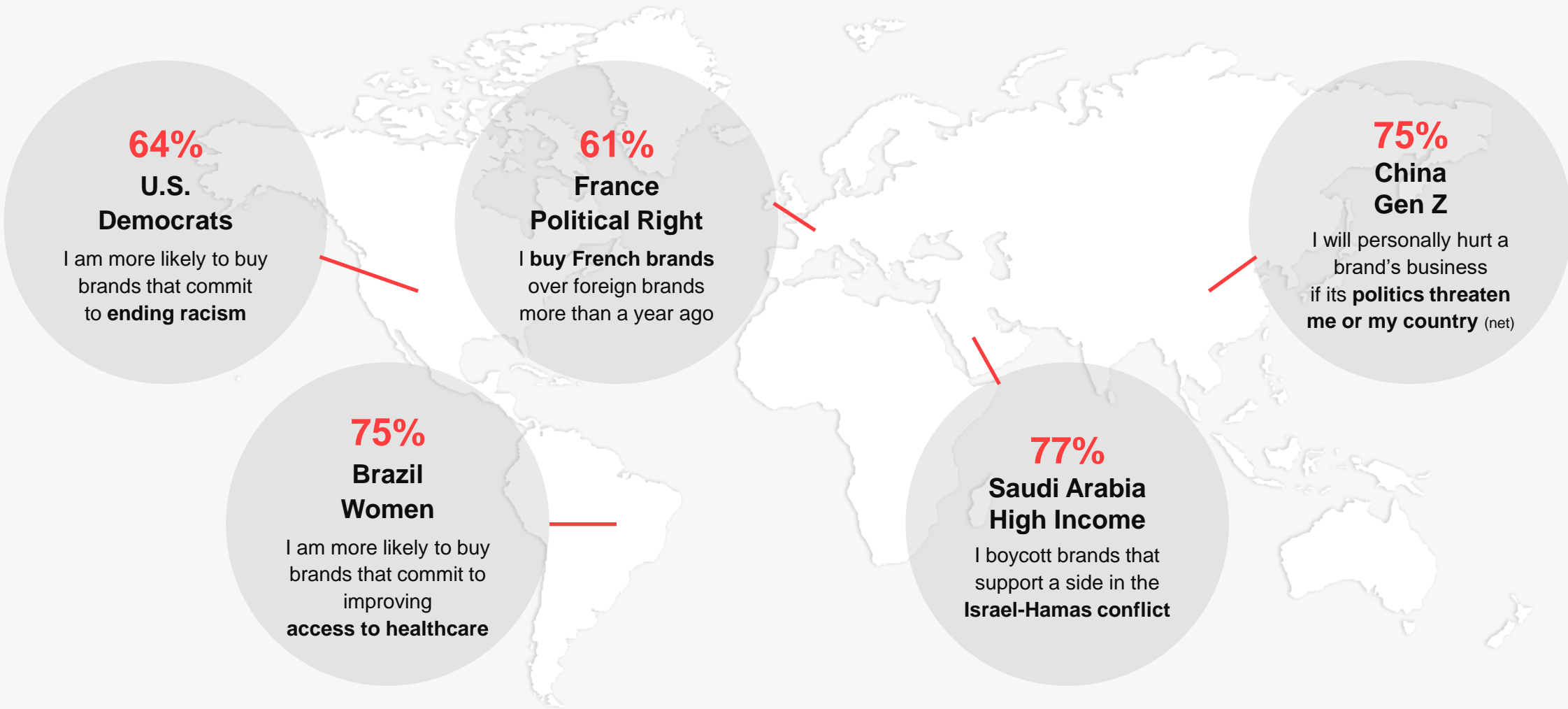


GLOBAL 11 excl. China, Saudi Arabia, UAE

2024 Edelman Trust Barometer Special Report: Brands and Politics. PERS_EMO. How much do you worry about each of the following? 9-point scale; top 4 box, worried. General population, 11-mkt avg. "Election outcomes" was not asked in China, Saudi Arabia, or UAE.

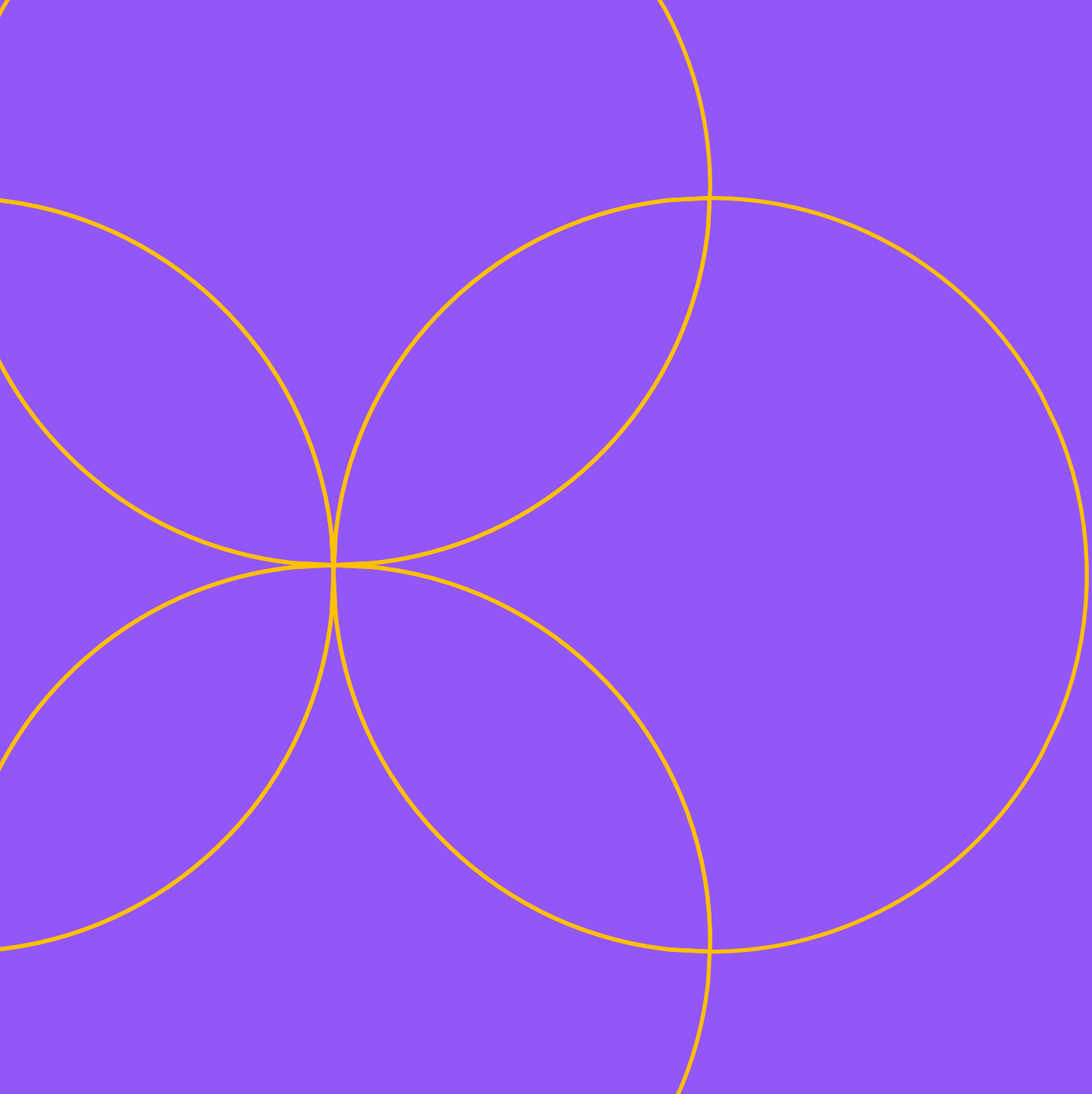


Brands in the Crosshairs: Consumers Buy or Boycott to Express Political Power



2024 Edelman Trust Barometer Special Report: Brands and Politics. RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? 4-point scale; code 4, more likely. Question asked of half the sample. General population, by Democrats in the U.S. and Women in Brazil. BRD_OPIN1. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, by political right in France and high income in Saudi Arabia. BDB_Q17. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Data shown is a net of attributes 24 and 38. General population, by those aged 18-27 in China.





Politics Urends the Business of Brands

Politically Driven Buying: 6 in 10 Buy Brands to Express Their Politics

Percent who say

GLOBAL 14 ● ○ + ○ Significant change ■ Politics[†]

I buy, choose, or avoid brands based on my politics

I have switched brands over politics

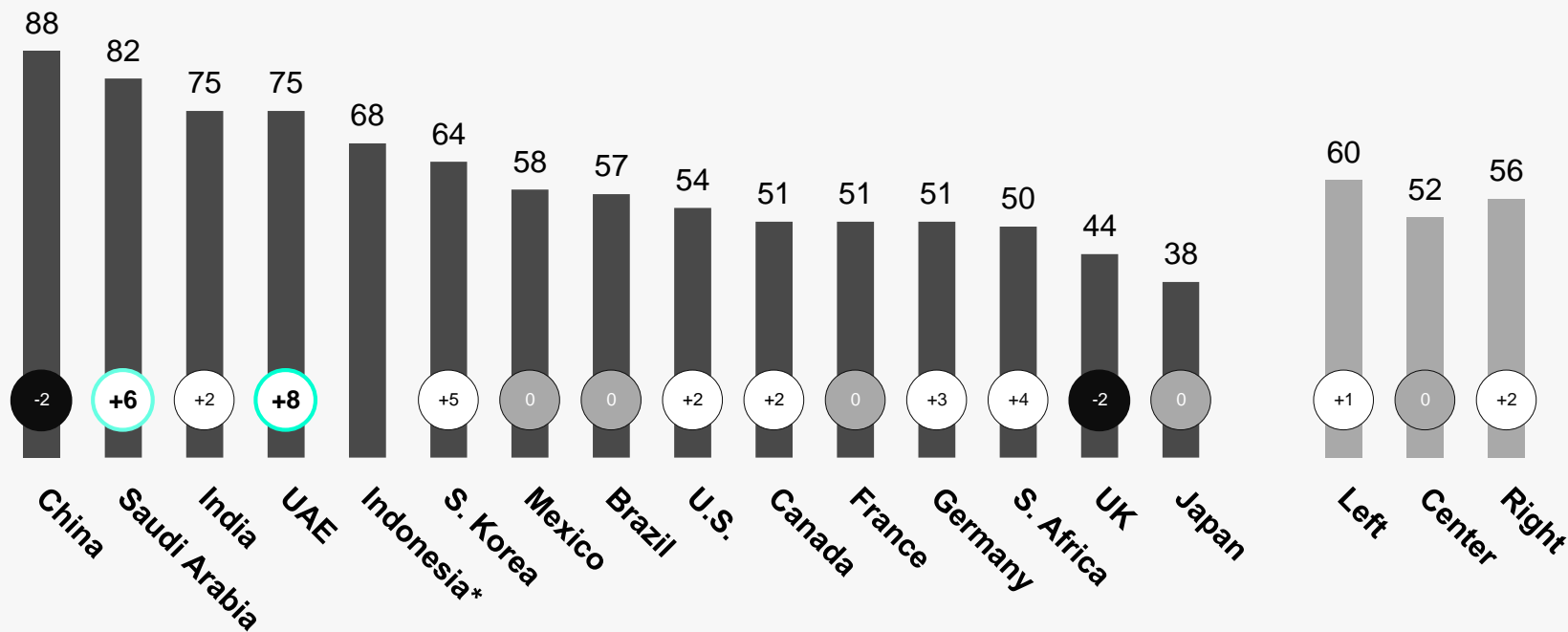
My brand choices express my political opinions

I have boycotted a brand because it stayed silent on a political issue

60%

+2 pts

Change, June 2023 to June 2024



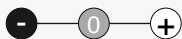
2024 Edelman Trust Barometer Special Report: Brands and Politics. Politically driven consumer segments. General population, 14-mkt avg., and by political leaning. *Indonesia is not included in the global average. †Political leaning was not asked in China, Saudi Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg. For a full explanation of how politically driven consumers were measured, please refer to the Technical Appendix.



Brand Nationalism: Israel-Hamas Conflict Sparks Boycotts

Percent who agree

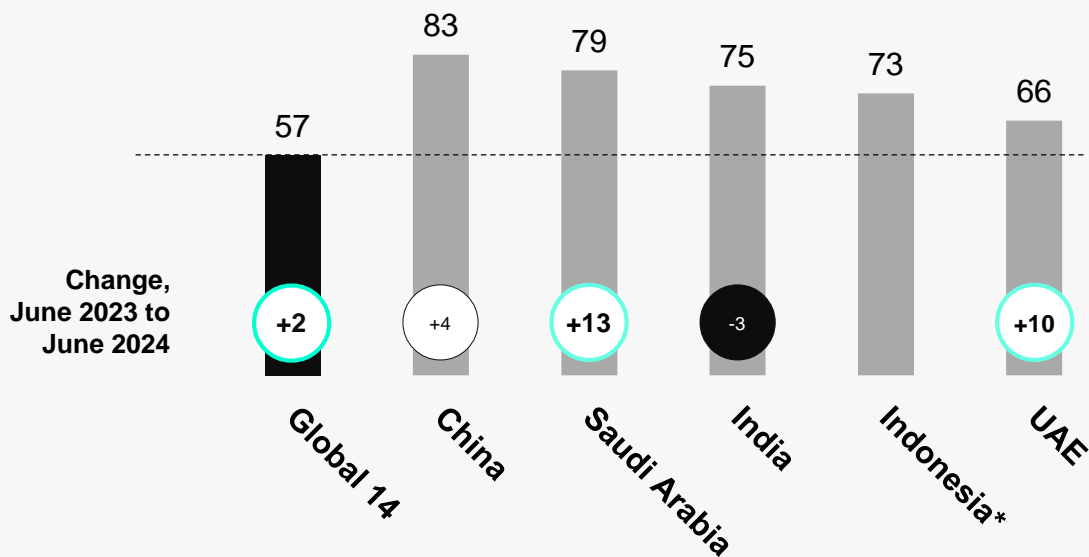
GLOBAL 14



Significant change

I am buying my country's brands instead of foreign brands **more often** today than I was a year ago

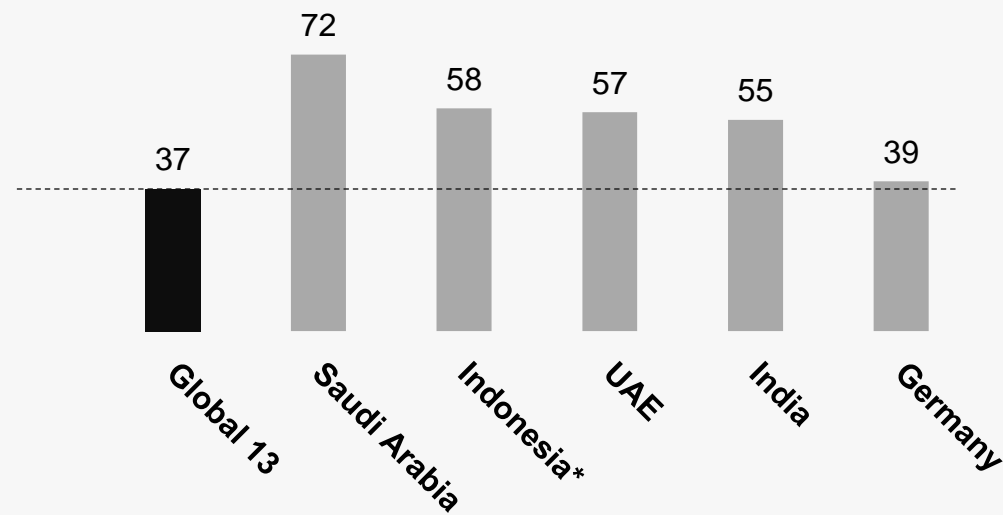
Top 5 of 15 countries



GLOBAL 13 excl. China

I am **boycotting brands** that support a side on the Israel-Hamas conflict

Top 5 of 14 countries

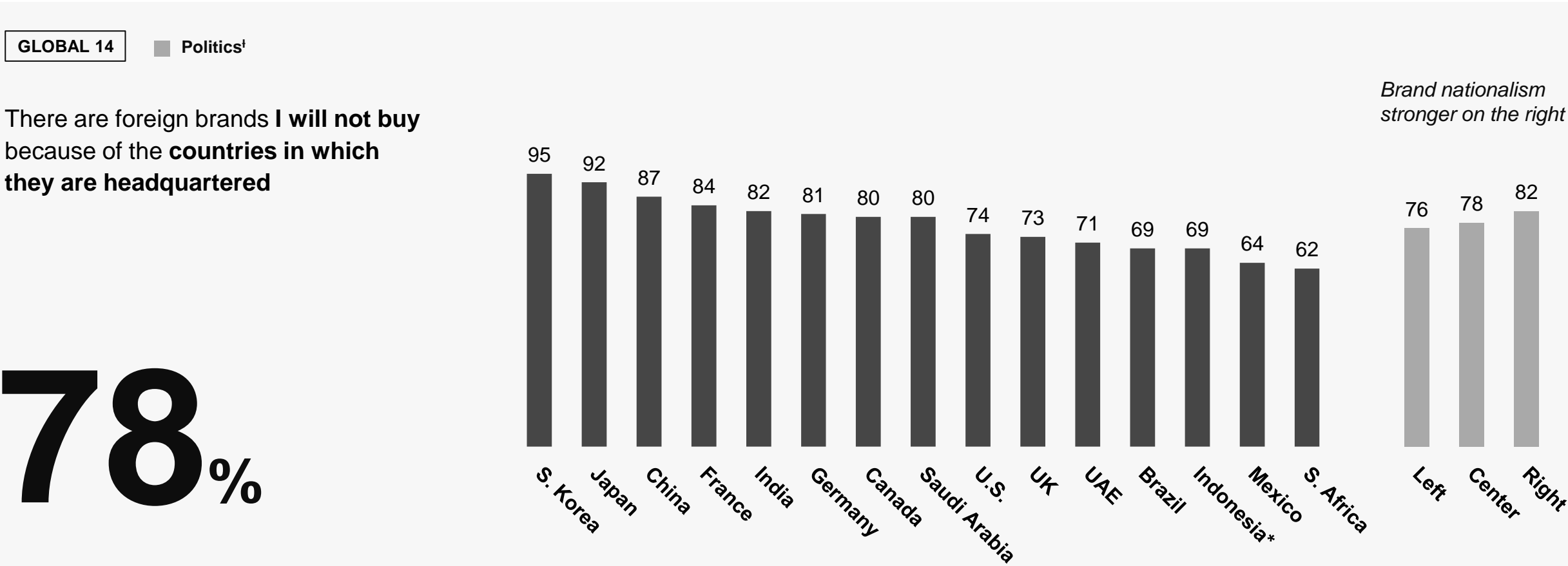


2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_OPIN1. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 14-mkt avg. for data on the left; 13-mkt avg. for data on the right. Data was not collected in China for "I am boycotting brands that support a side on the Israel-Hamas conflict." Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Brand Nationalism: Majority Around the World Boycott Foreign Brands

Percent who agree



2024 Edelman Trust Barometer Special Report: Brands and Politics. WILL_BUY_FGN. Using the scale below, please indicate your attitude towards buying brands from companies headquartered in each of the following countries. 4-point scale; top 2 box, avoid or will not buy. Question asked of half the sample. General population, 14-mkt avg., and by political leaning. *Indonesia is not included in the global average. †Political leaning was not asked in China, Saudi Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg. For this analysis, respondents were shown a list of countries – the same 15 countries included in the survey – and the data shown is a net of all countries being rated, except Indonesia, S. Africa, and the respondent's home country.

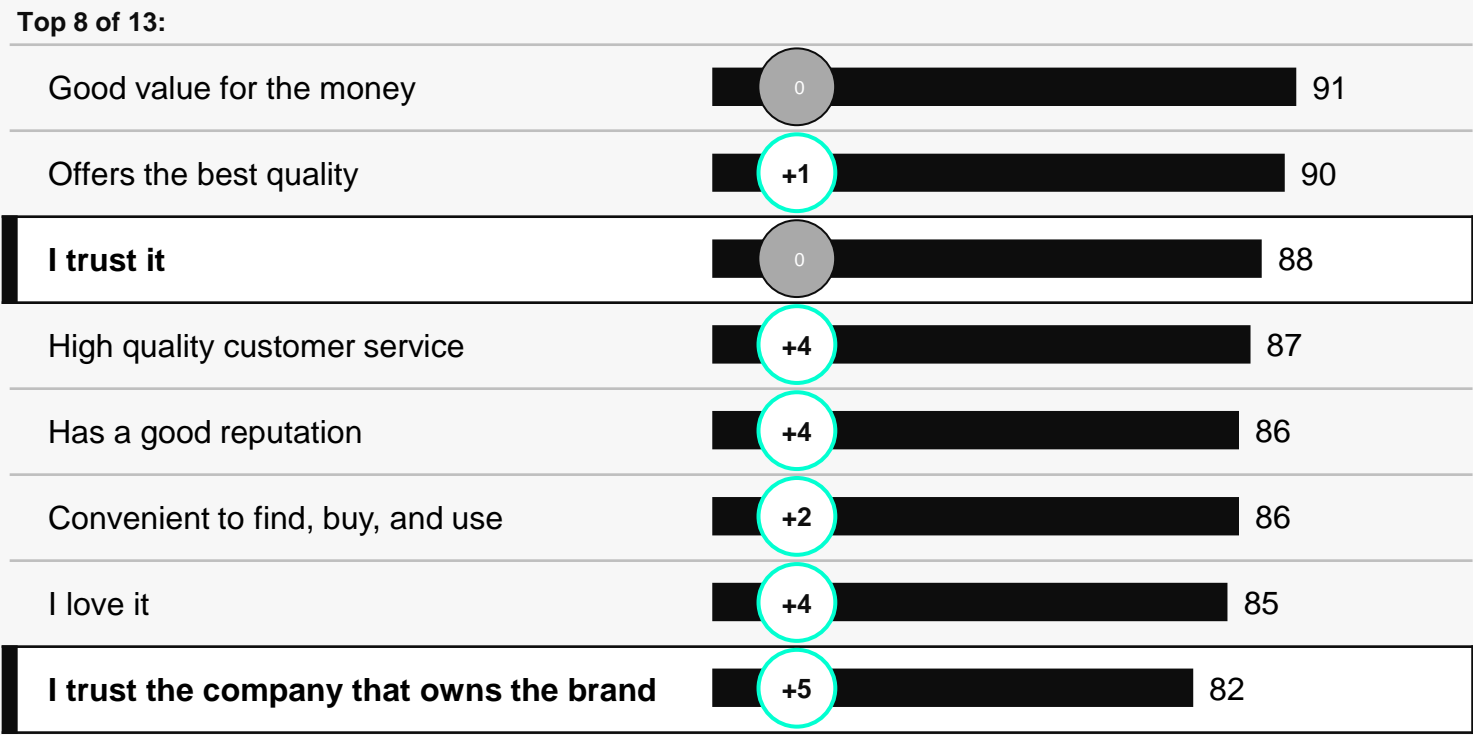


Need for Trust Expands: Trust in Parent Company Rises as Critical Purchase Criteria

Percent who say

GLOBAL 14 - 0 + Change, June 2023 to June 2024 Significant change

When it comes to the brands I buy or use, this is **important or a dealbreaker**



Trust remains a top 3 purchase criteria

Greater scrutiny of a brand's parent company

2024 Edelman Trust Barometer Special Report: Brands and Politics. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior and not what you would do in a perfect world. 3-point scale; codes 1-2, dealbreaker or important. Question asked of half the sample. General population, 14-mkt avg. Data is showing the top 8 criteria, with ties broken by decimal. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

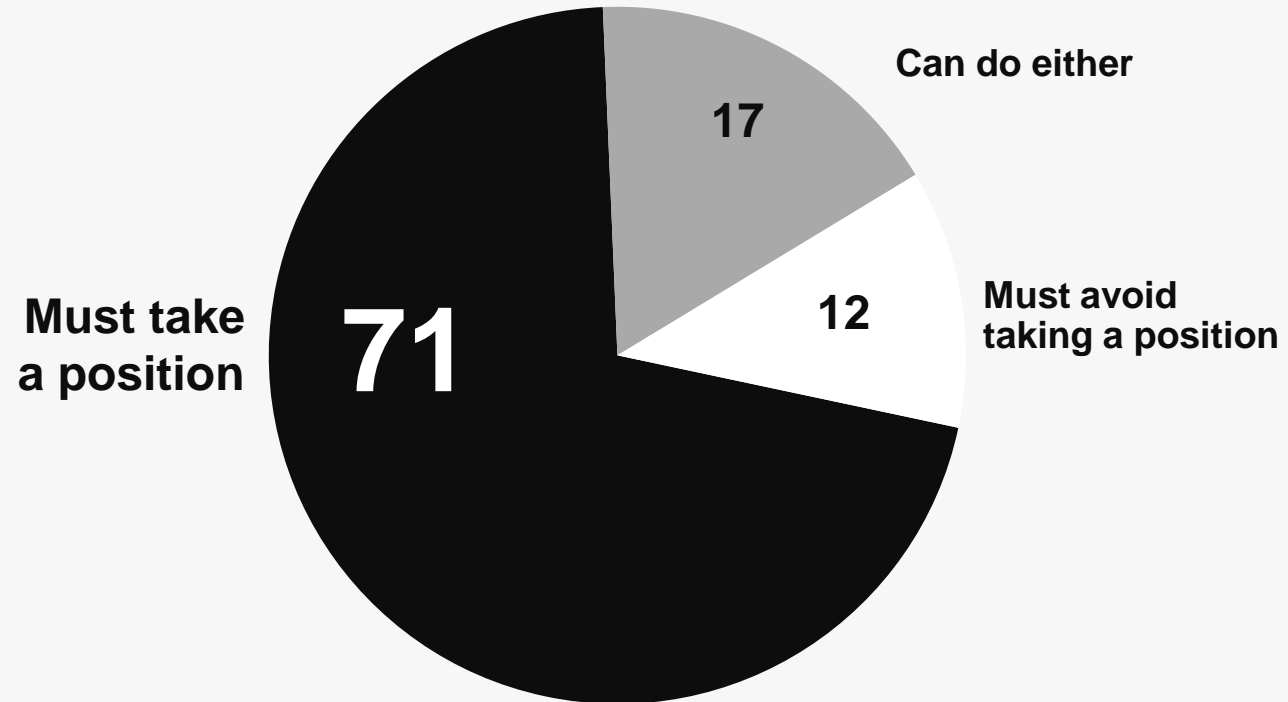


In Face of Political Pressure, Brands Can't Hide

Percent who say

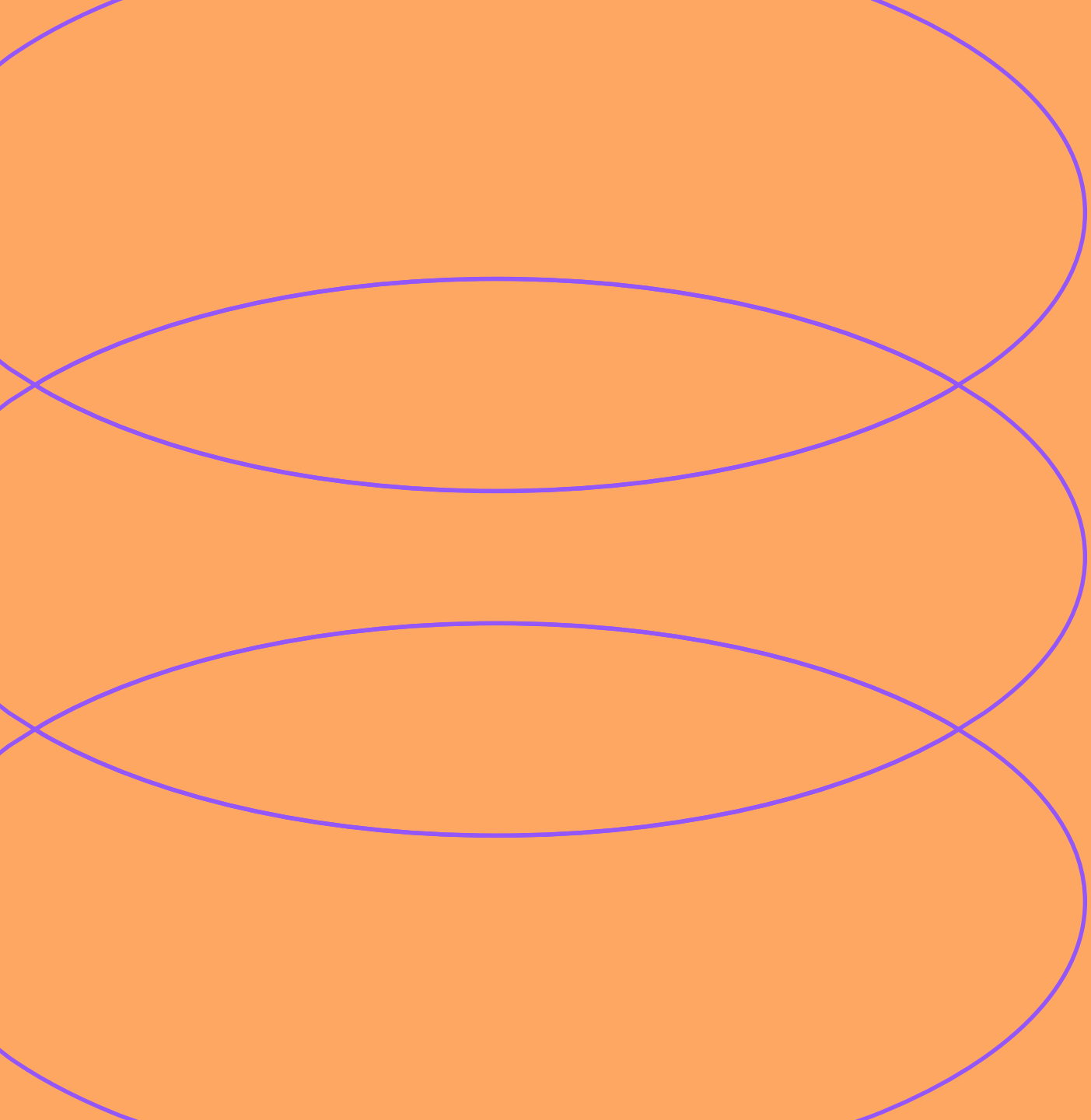
GLOBAL 14

When **under pressure to take a side** on a controversial or political issue, the brand...



2024 Edelman Trust Barometer Special Report: Brands and Politics. EB_Q59. If a brand or company is being pressured to decide which side of an important but controversial social or political issue to support, which of the following do you feel are acceptable ways for that brand to behave? Pick all that apply. Question asked of half the sample. General population, 14-mkt avg. "Must take a position" is anyone who said a brand should take some kind of action (attributes 2-11) but did not say it should avoid taking a position; "Must avoid taking a position" is anyone who said that exclusively; "Can do either" is anyone who said a brand should take some kind of action (attributes 2-11) and should avoid taking a position.





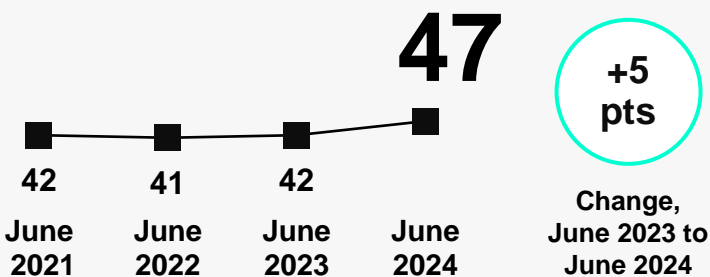
Your Brand, My Politics

My Brand Choices Express My Political Values

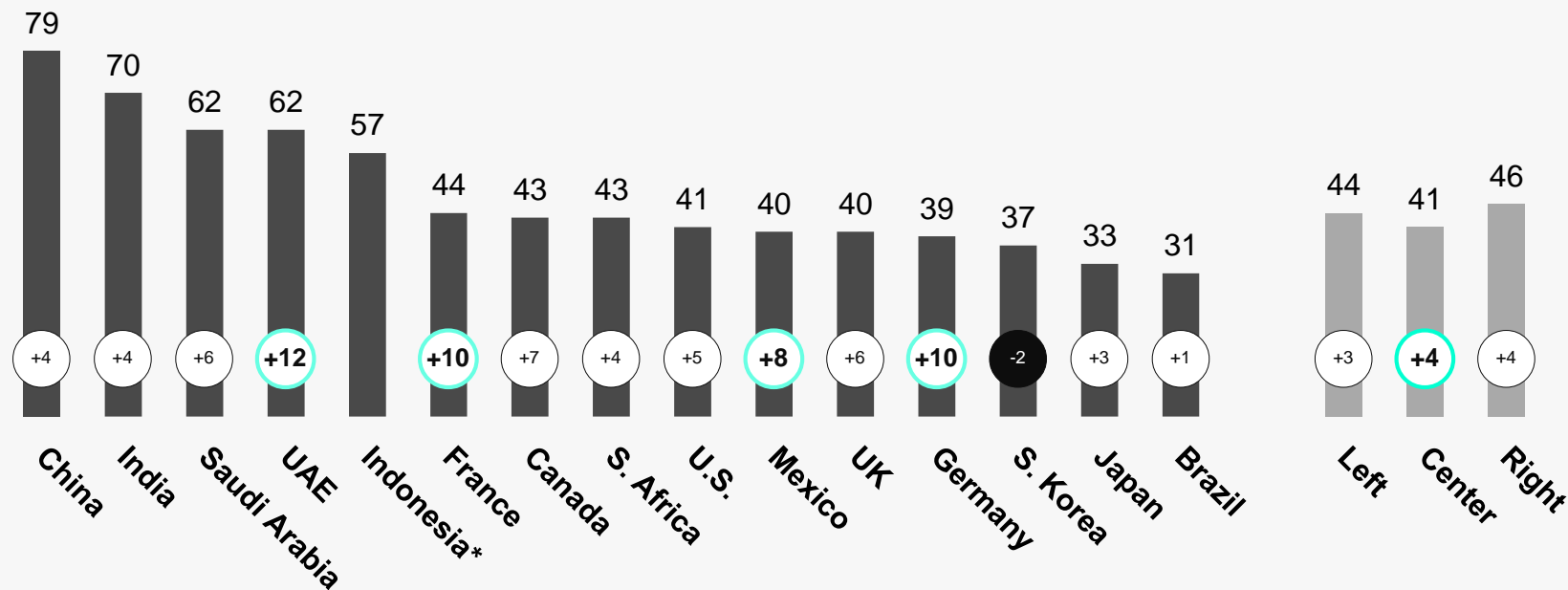
Percent who agree

GLOBAL 14 ● ○ + ○ Significant change ■ Politics[†]

Using a brand from a particular country **signals approval of that country's government**



Significant increases in UAE, France, Mexico, Germany



2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_OPIN1. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 14-mkt avg., and by political leaning. *Indonesia is not included in the global average. †Political leaning was not asked in China, Saudi Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



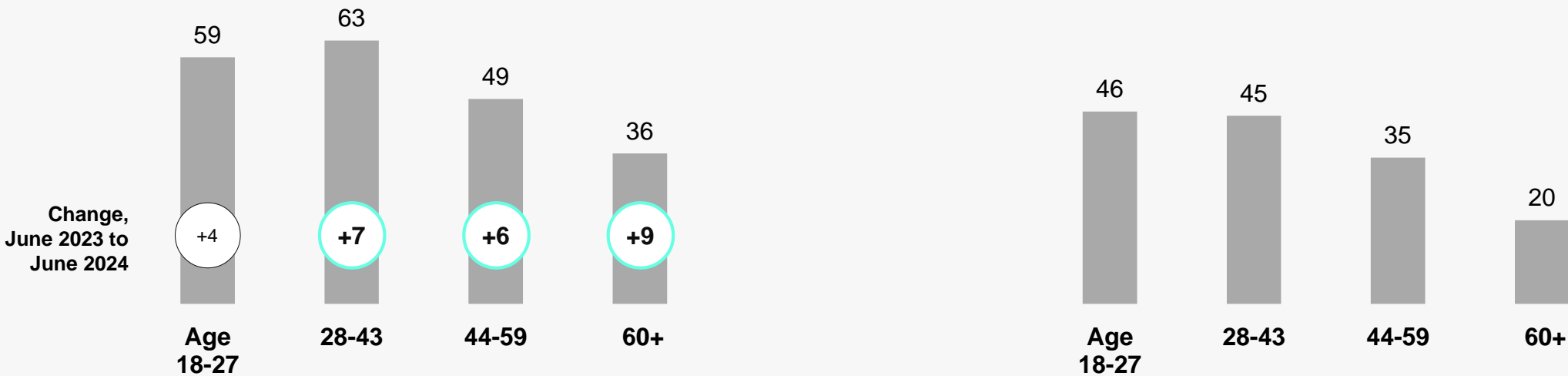
My Brand Choices Define My Social Identity

Percent who agree

GLOBAL 14 ● ○ + ○ Significant change

I feel a connection to people who use the same brands I do

I judge people on the brands they buy or use



2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_OP. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 14-mkt avg., by generation. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level. These age segments represent generations, please refer to the Technical Appendix for how we define generations each year.



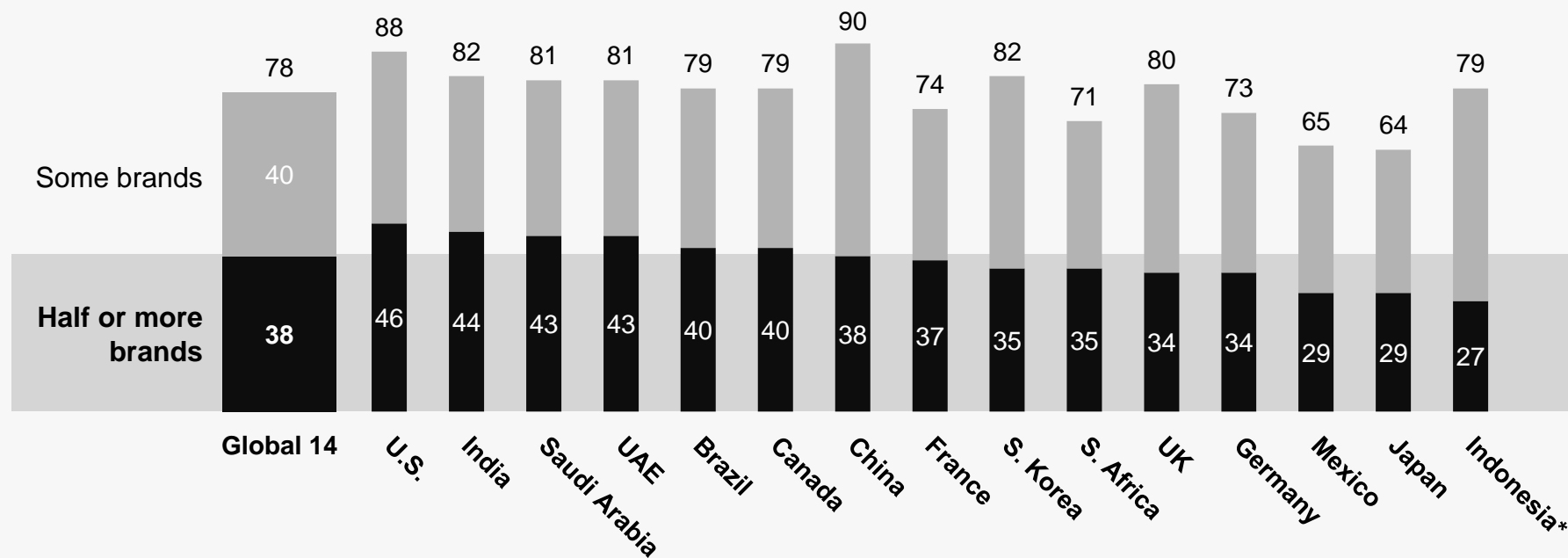
8 in 10 See Brands as Political

Percent who say

GLOBAL 14

I feel brands are doing things I consider to be **political or politically motivated**

Nearly 1 in 2 U.S. consumers believe half or more brands are political



2024 Edelman Trust Barometer Special Report: Brands and Politics. POL_PER. Thinking about the brands in general that you are aware of, how many of them do you feel are engaged in behavior or actions that you consider to be political or politically-motivated? Code 2, some brands; codes 3-5, half or more brands. General population, 14-mkt avg. *Indonesia is not included in the global average.

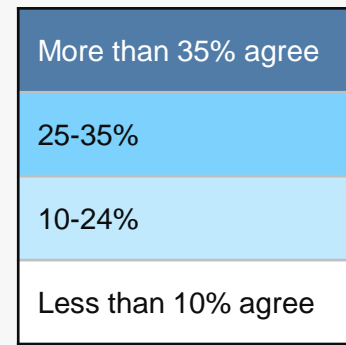
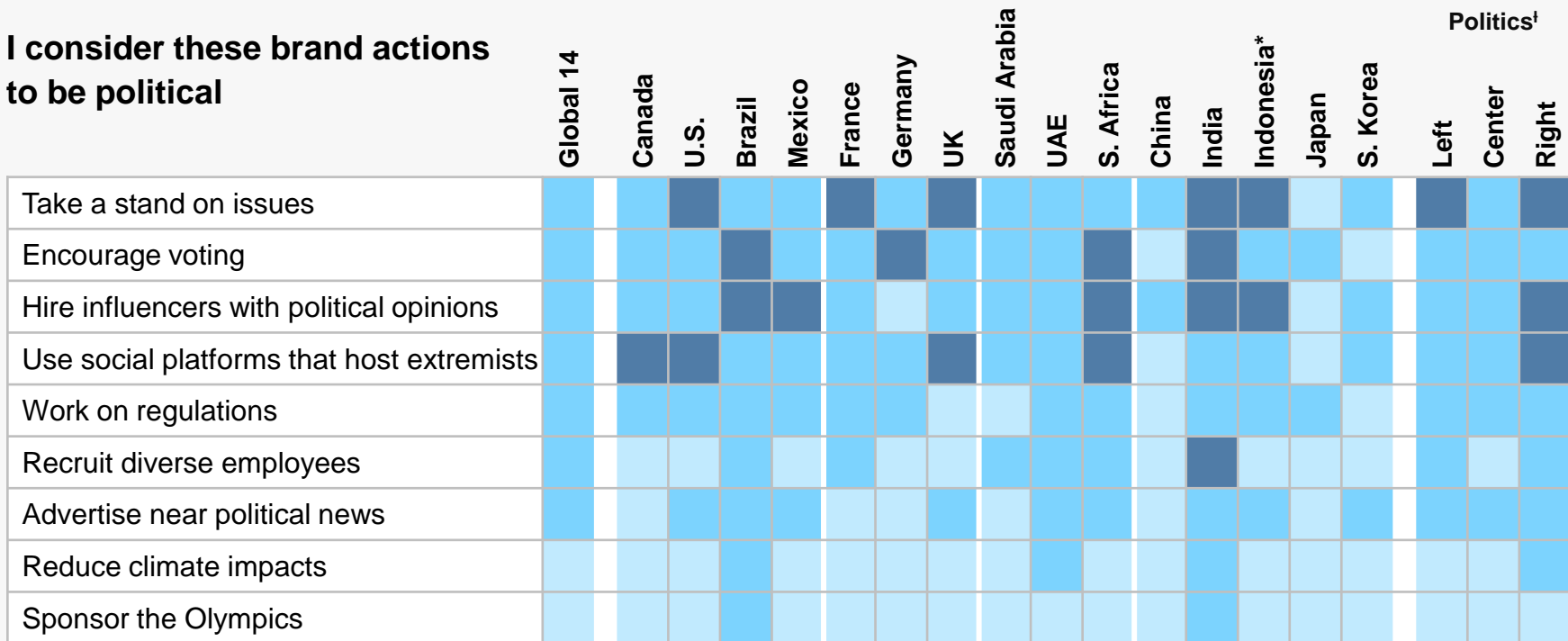


Everyday Brand Actions Seen as Political

Among the 78% globally who feel at least some brands are doing political things, percent who say

GLOBAL 14

I consider these brand actions to be political



2024 Edelman Trust Barometer Special Report: Brands and Politics. WHAT_POL. Which of the following brand actions, if any, do you consider to be political or politically motivated? Pick all that apply. Question asked to those who said they feel at least some brands are doing things they consider to be political (POL_PER/2-5). General population, 14-mkt avg., and by political leaning. *Indonesia is not included in the global average. †Political leaning was not asked in China, Saudi Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg.



Silence Is Political: When Brands Say Nothing, 1 in 2 Assume the Worst

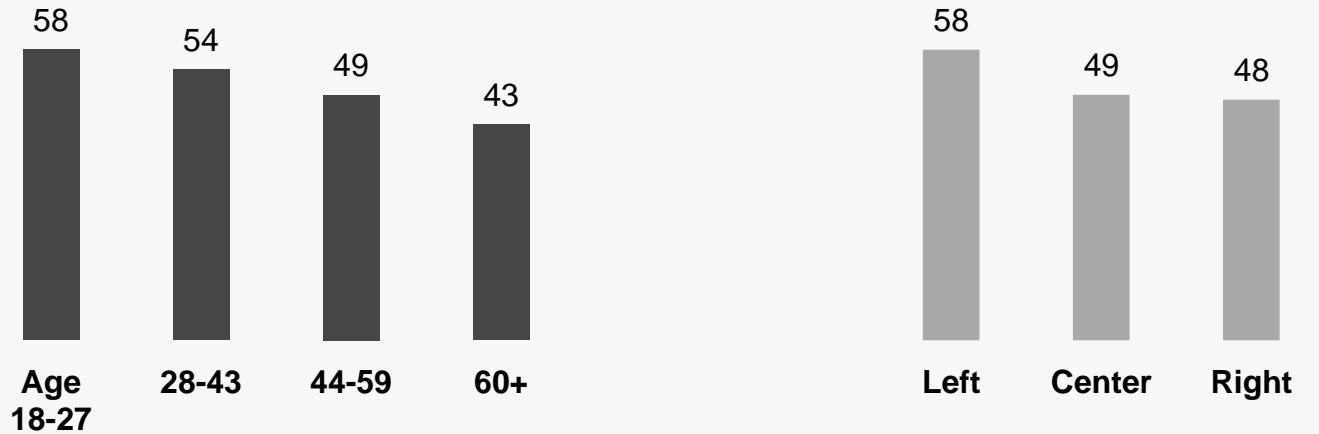
Percent who say

GLOBAL 14 ■ Politics[†]

If a brand doesn't communicate its actions to address societal issues, **I assume it is doing nothing or hiding something** (net)

51%

Nearly 6 in 10 Gen Z assume the worst when brands stay silent



2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_SILENT. If a brand does not mention in its advertising or public communications the things it is doing to address issues like climate change, increasing diversity within its organization, equity and racial justice, or retraining workers who lose their jobs due to automation, which of the following are you most likely to assume is true? Data shown is a net of codes 2-3. Question asked of half the sample. General population, 14-mkt avg., and by generation and political leaning. [†]Political leaning was not asked in China, Saudia Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg.



Brands Expected to Do More, Not Less

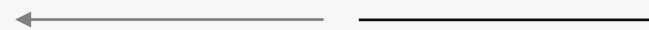
Percent who say

GLOBAL 14

2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_BND. Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more. 3-point scale; code 1, too far; code 3, not far enough. General population, 14-mkt avg. "Diversity" is referring to "Having a marketing strategy that aims to ensure that people from diverse backgrounds are consistently represented."

On these issues, brands...

are going too far should do more



Climate



Fair pay



Retraining



Misinformation



Public health



Diversity



Voter participation



Weigh in on politics





Defining Your Brand's Permission to Act

Action Drives Trust: Each Brand's Permission Space Creates Clarity for Action

Shared values, along with the political and cultural context, define when, why, and how a brand should act—whether the action be big or small, external or internal

The political and cultural context is highly volatile and can quickly expand or limit a brand's permission space



Anchor Brand Action in Shared Values

Percent who say

GLOBAL 14

I need to share values with a brand in order to buy it (net)

84%

... and the categories where this matters most to me are:	Global 14	Age 18-27	28-43	44-59	60+
Personal health	44	47	47	43	37
Food and beverage (avg)	39	40	42	38	34
Fashion and apparel	37	47	44	36	23
Financial services	34	32	35	34	32
Pharmaceuticals	33	30	34	34	32
Social media	32	42	38	29	20
Cosmetics and beauty	31	40	37	30	18
Car/automobile	30	29	32	30	29
Personal technology	30	33	35	29	22

Generation with highest agreement

For many brand categories, shared values matter more to younger generations

2024 Edelman Trust Barometer Special Report: Brands and Politics. VAL_MATCH_IMP. Please indicate for which of the following brand categories a shared set of values between you and the brand is an important purchase consideration. Pick all that apply. General population, 14-mkt avg., and by generation. Data on the left is a net of attributes 1-12 (the inverse of "I do not need to share values with a brand in order to use it"). "Food and beverage" is an average of attributes 2, 10, and 11.



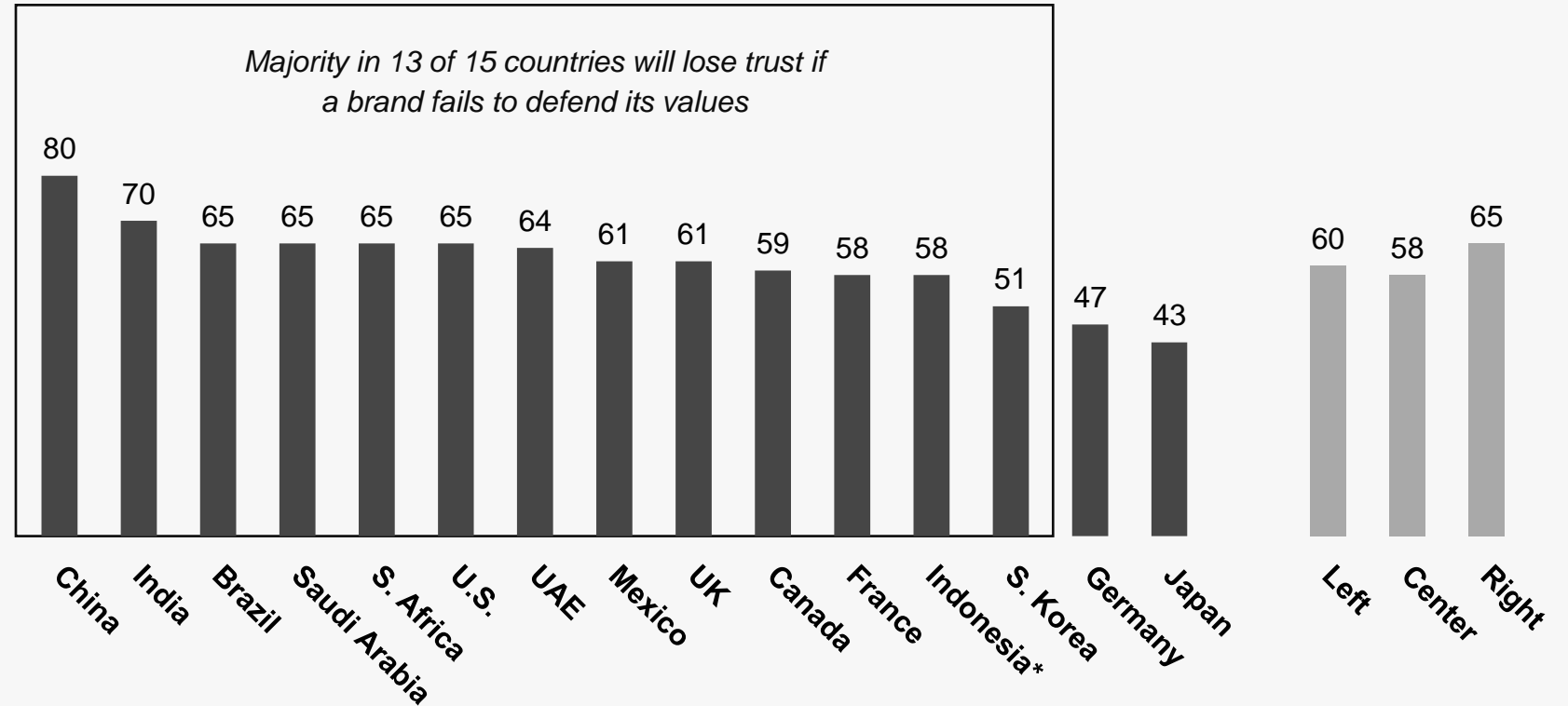
Don't Compromise Your Values When Under Attack

Percent who agree

GLOBAL 14 ■ Politics[†]

I am **less likely to trust a brand that surrenders** to politically motivated attacks rather than defends its values

61%



2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_CUL. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 14-mkt avg., and by political leaning. *Indonesia is not included in the global average. †Political leaning was not asked in China, Saudi Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg.



Avoid Contextual Naïveté: Map Your Brand’s Permission to Act Against the Local Cultural Context

Analysis comparing the percent who say brands should do more vs brands are going too far

GLOBAL 14

Consensus for more brand action on each issue:

- Strong consensus
- Weaker consensus
- Little consensus

	Global 14	Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea
Climate	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Fair pay	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Retraining	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Misinformation	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Public health	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Diversity	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Voter participation	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Weigh in on politics	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●

2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_BND. Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more. 3-point scale; code 1, too far; code 3, not far enough. General population, 14-mkt avg. *Indonesia is not included in the global average. This graphic is based on a multiplier analysis, measuring the percent who say brands should do more vs brands are going too far. "Strong consensus" are multipliers that are more than 2, "Weaker consensus" are multipliers between 1 and 2, "Little consensus" are multipliers less than 1. "Diversity" is referring to "Having a marketing strategy that aims to ensure that people from diverse backgrounds are consistently represented."

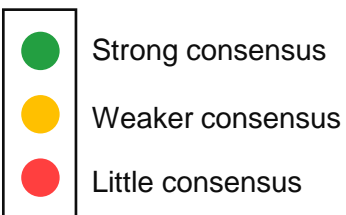


U.S. Case Study

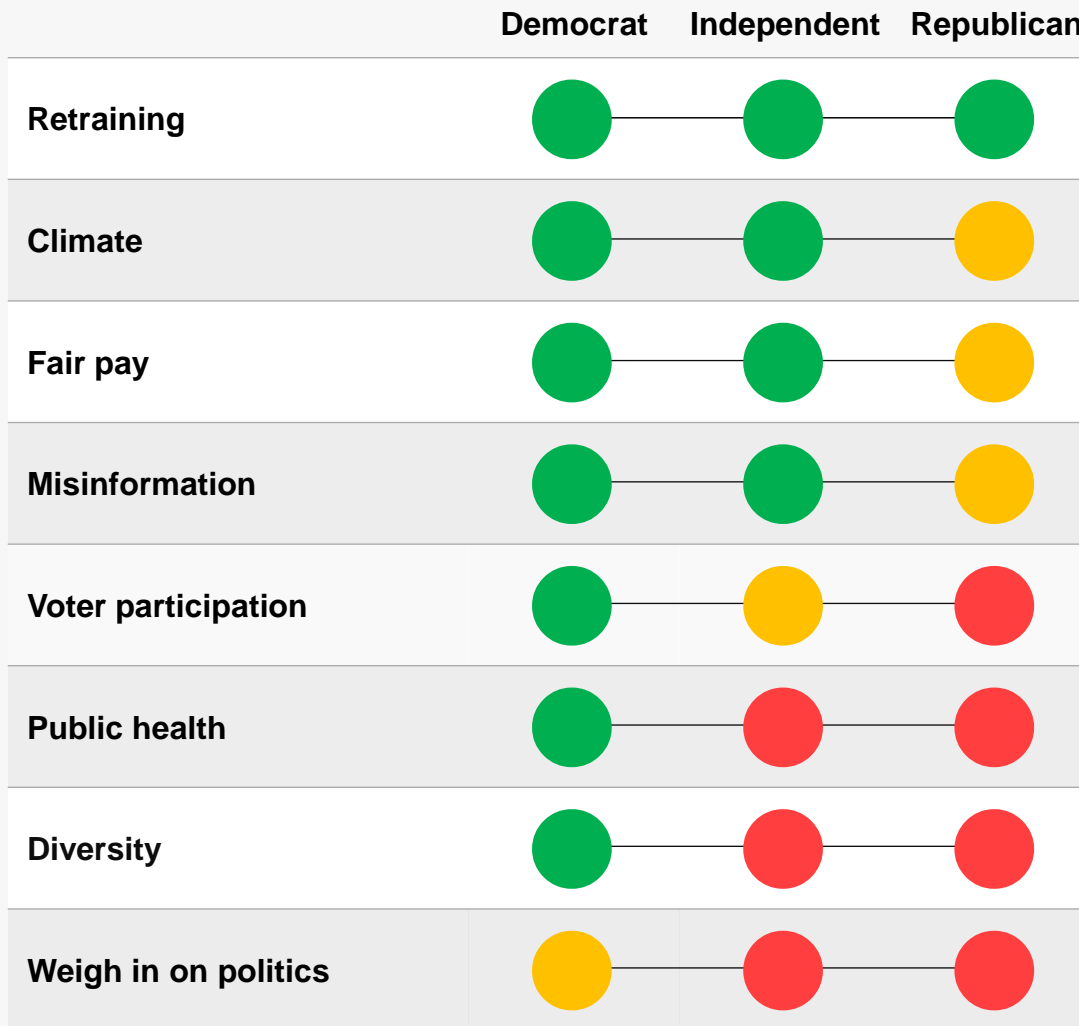
To Know Your Audience Is to Know Their Politics

Analysis comparing the percent who say brands should do more vs brands are going too far, in the U.S.

Consensus for more brand action on each issue:



2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_BND. Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more. 3-point scale; code 1, too far; code 3, not far enough. General population, U.S. political affiliation. This graphic is based on a multiplier analysis, measuring the percent who say brands should do more vs brands are going too far. "Strong consensus" are multipliers that are more than 2, "Weaker consensus" are multipliers between 1 and 2, "Little consensus" are multipliers less than 1. "Diversity" is referring to "Having a marketing strategy that aims to ensure that people from diverse backgrounds are consistently represented."



Greater mass appeal across political divides

More opportunity for brands to provoke conversation



Two decorative yellow lines are present on the left side of the slide. One is a horizontal, slightly curved line that spans across the middle of the slide. The other is a vertical, curved line that starts from the top and goes down, crossing the horizontal line. Together, they form a shape resembling a stylized '4' or a cross with rounded ends.

Your Permission
Space Is Your
Obligation to Act

Brands That Act on Good Values Have More Value

Percent who agree

GLOBAL 14

● — 0 — ● Change, June 2023 to June 2024 ○ Significant change

Even if two products are almost identical,
there are brands worth paying more for because...

of the good they do in the world

59% +3 pts

they have earned my trust

62% +2 pts

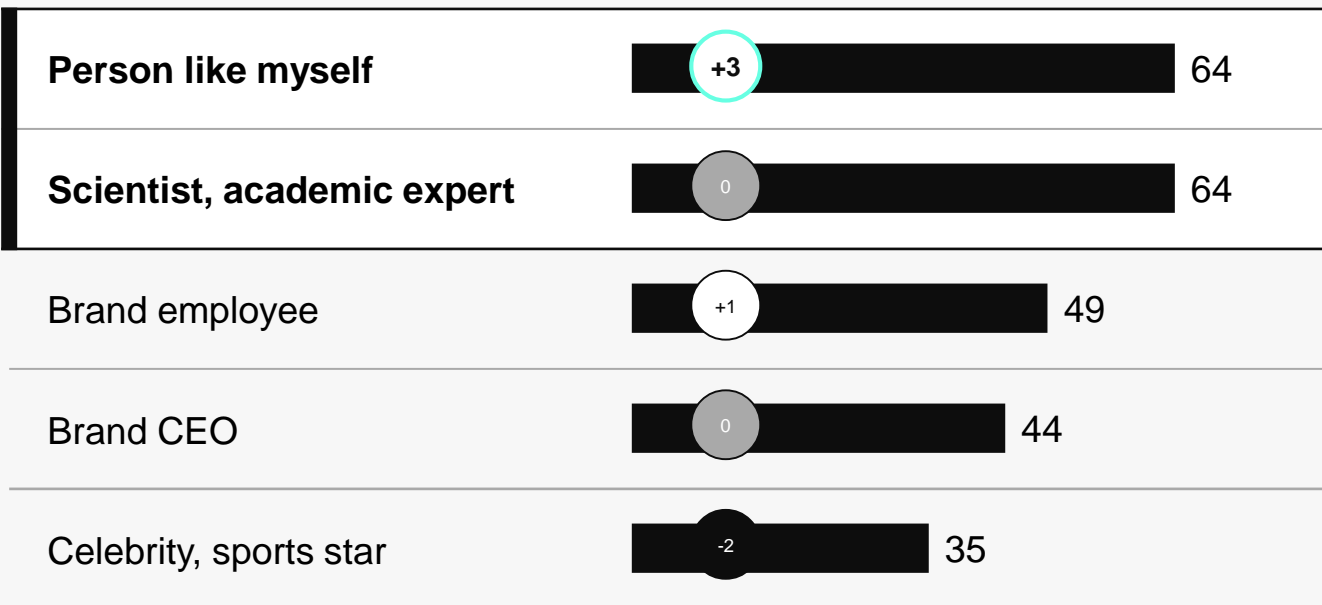


Expert and Everyday Voices Most Credible; Ensure Brand Ambassadors Live Your Values

Percent who say

GLOBAL 14 ● ○ + Change, June 2023 to June 2024 ○ Significant change

I consider each to be a **credible brand spokesperson**



Brands should fire spokespeople who go against the brand's values in their private lives

56%

2024 Edelman Trust Barometer Special Report: Brands and Politics. ABILITY_SPK_A. If a brand were to use each of the following as their spokesperson/brand ambassador, how credible or believable would you consider them to be? 4-point scale; top 2 box, credible. Question asked of half the sample. Q17. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 14-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



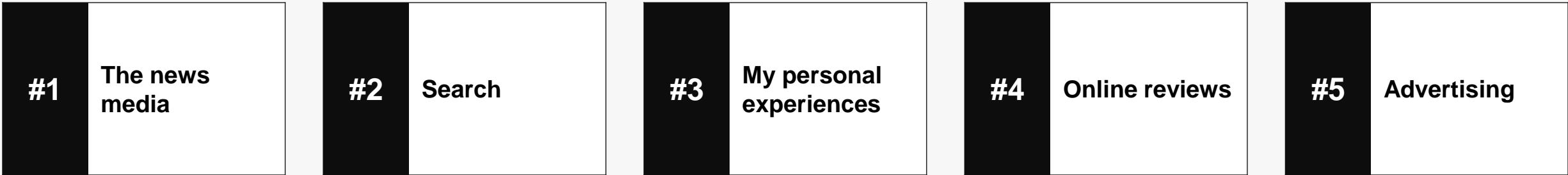
Brand Values Are Made and Broken in the Media; Don't Rely on Advertising Alone to Convince Me of Your Impact

Percent who say

GLOBAL 14

This is where I find out about
brands' positive impact on society

Top 5 of 9



2024 Edelman Trust Barometer Special Report: Brands and Politics. BRD_CHNL1. Among the sources of information listed below, select the one that best fits each of the following descriptions. Question asked of half the sample. General population, 14-mkt avg. Data is showing the top 5 channels, with ties broken by decimal.

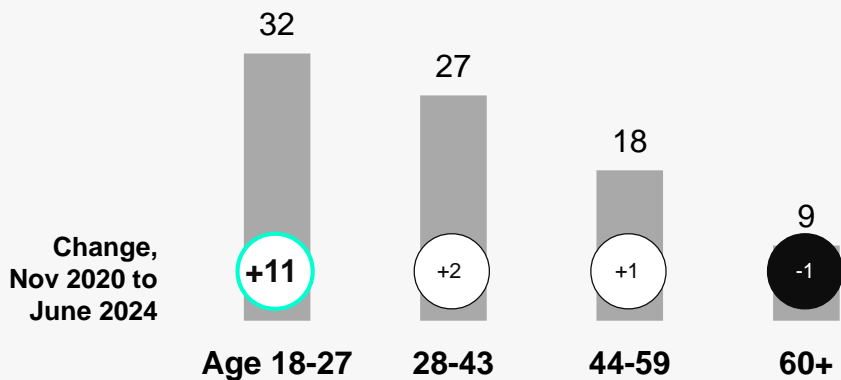


For Gen Z, Social Media is the Battleground for Trust

Percent who say

GLOBAL 8 Significant change

In the last year, an **influencer has increased my trust in a brand**



GLOBAL 11 excl. China, Saudi Arabia, UAE

Globally, among the 32% who were upset by a brand in the last year:
This is **where I learned a brand did something to upset me**

	Age 18-27	28-43	44-59	60+
Social media	#1	#1	#3	#3
My personal experience	#2	#2	#2	#2
In the news	#3	#3	#1	#1

2024 Edelman Trust Barometer Special Report: Brands and Politics. WIN_TRUST. Thinking back over the past year, have you seen or heard anything about a brand that increased your trust in that brand from any of the following sources of information? Pick all that apply. Question asked of half the sample. General population, 8-mkt avg. CON_HEAR. How did you first learn about the issue? Question asked among those who said a brand has upset them in the last year (BRD_CON/1). General population, 11-mkt avg. "In the news" was not asked in China, Saudi Arabia, and UAE. Data on the right is showing the top 3 sources, with ties broken by decimal. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level. These age segments represent generations, please refer to the Technical Appendix for how we define generations each year.



Consumers Will Protect the Brands They Trust

Percent who say

GLOBAL 14

I'm more likely to do this on behalf of a brand I fully trust vs one I do not

Purchase (net)

*Buy new products
Buy it even if it's more expensive*

63%

Stay loyal (net)

*Do not shop around for other brands
Even if it makes a mistake
Even if others accuse it of wrongdoing*

55%

Advocate

*Recommend the fully trusted brand
to other people*

53%



Brands and Politics: How to Live Your Values and Earn Trust in a Politicized Culture

1

Don't be paralyzed by politics

Today, culture is politics and many everyday brand actions can be seen as political. In a world where silence is a stance, the question isn't "should I get involved in politics?" but rather "how do I navigate politics?"

2

Act multi-local

Against a backdrop of geopolitical tension and polarization, brands must be agile and adaptable. They must live their values locally and demonstrate positive impact everywhere they do business.

3

Know *their* politics

To know your audience means to know their politics—a fundamental difference in how relevance and trust are earned today. Be authentic and defend the values you share with customers and employees.

4

Action drives trust

Good business is powered by action and every brand has an opportunity to act. Know your brand's unique permission space for clarity on when, why, and how to act.



Appendix: Supplemental Data



Full List of Brand Purchase Criteria, Across Countries

Percent who say When it comes to the brands I buy or use, this is important or a dealbreaker...

Significant change*	Global 14		Brazil		Canada		China		France		Germany		India		Indonesia*		Japan		Mexico		Saudi Arabia		S. Africa		S. Korea		UAE		UK		U.S.	
	+/- June 2023 to June 2024																															
	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-	%	+/-
Good value for the money	91	0	93	1	95	3	92	2	93	0	87	0	87	-3	91		93	1	90	-3	85	-3	93	1	87	0	89	1	95	4*	90	-3
Offers the best quality	90	1*	93	0	90	0	92	1	93	4	86	2	88	-2	93		91	9*	90	-3	86	-2	93	3	88	3	89	-1	94	6*	91	0
I trust it	88	0	92	4	91	2	91	0	87	1	80	-2	89	0	91		94	2	85	-1	85	0	91	4	87	2	88	-1	88	0	90	0
High quality customer service	87	4*	92	2	83	4	92	2	88	5*	79	7*	89	-1	88		87	11*	86	1	84	1	88	2	88	5*	87	1	86	9*	86	7*
Has a good reputation	86	4*	92	4*	90	9*	92	3	83	3	77	7*	88	1	88		83	8*	84	0	85	2	89	7*	86	3	87	1	89	9*	86	4
Convenient to find, buy, and use	86	4*	87	3	86	2	88	1	87	4	80	5	85	1	89		90	2	87	1	86	2	86	2	88	4	87	1	86	2	87	1
I love it	85	4*	83	12*	86	7*	90	1	82	8*	76	4	85	-1	88		86	1	85	0	85	2	89	7*	85	1	89	5	83	7*	86	3
I trust the company that owns the brand	82	5*	84	2	83	9*	91	2	79	7*	79	3	85	2	79		86	6*	77	6	83	1	81	5	72	3	84	2	77	5	84	8*
Reflects me as a person	81	5*	86	6*	76	10*	93	5*	75	7*	75	8*	84	1	81		83	0	78	8*	81	-1	83	12*	83	4	87	6*	72	7*	77	4
Treats its employees well	78	6*	87	6*	74	6	87	6*	79	8*	70	2	80	1	82		66	8*	74	5	78	2	82	8*	74	9*	83	6*	75	8*	80	9*
Has a small climate impact	76	3*	80	0	72	4	92	9*	74	0	72	3	81	0	85		64	6	81	2	76	-1	78	9*	76	4	81	5	69	4	69	4
Has a clear mission	73		77		70		83		72		69		81		77		58		75		77		76		65		82		64		68	
Headquartered in my country	70	7*	69	9*	69	7*	78	5	78	5	66	3	80	4	70		55	10*	72	7*	77	5	67	7*	62	10*	73	7*	59	5	72	10*

2024 Edelman Trust Barometer Special Report: Brands and Politics. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. Please base your answers, using the scale below, on your actual purchase behavior and not what you would do in a perfect world. 3-point scale; codes 1-2, dealbreaker or important. Question asked of half the sample. General population, 14-mkt avg. *Indonesia 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.



Politically Driven Buying, Across Demographics

Percent who say

GLOBAL 14 ● ○ + ○ Significant change

I buy, choose, or avoid brands based on my politics

I have switched brands over politics

My brand choices express my political opinions

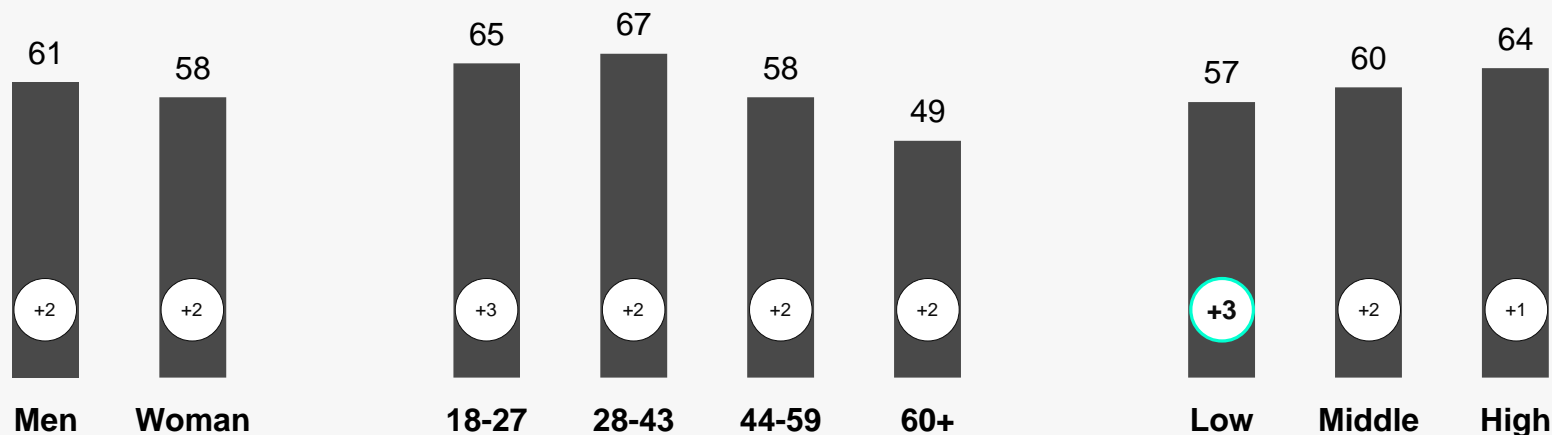
I have boycotted a brand because it stayed silent on a political issue

60%

+2 pts

Change, June 2023 to June 2024

Gender | Age | Income

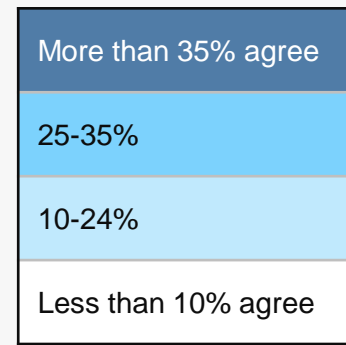


Everyday Brand Actions Seen as Political: Full Data

Among the 78% globally who feel at least some brands are doing political things, percent who say

GLOBAL 14

I consider these brand actions to be political	Global 14	Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea	Politics†		
																	Left	Center	Right
Take a stand on issues	33	32	43	34	31	38	33	37	28	34	33	26	40	36	23	28	38	31	40
Encourage voting	32	31	30	37	35	33	36	34	26	33	44	22	39	30	32	17	35	33	35
Hire influencers with political opinions	32	29	35	36	39	29	24	28	32	34	38	26	40	41	23	28	34	29	36
Use social platforms that host extremists	31	36	43	29	25	29	28	36	31	33	38	22	35	30	19	28	34	31	36
Work on regulations	27	28	27	33	28	27	30	24	23	27	34	22	33	29	30	20	33	28	28
Recruit diverse employees	26	24	22	34	24	26	19	22	31	33	32	19	40	24	19	17	26	23	32
Advertise near political news	26	24	29	31	32	23	19	27	23	27	33	20	32	25	21	25	29	26	28
Reduce climate impacts	22	21	20	29	21	24	23	20	18	27	23	17	32	19	15	12	24	21	25
Sponsor the Olympics	19	16	15	26	19	22	17	14	18	24	20	18	28	19	19	15	20	18	21



2024 Edelman Trust Barometer Special Report: Brands and Politics. WHAT_POL. Which of the following brand actions, if any, do you consider to be political or politically motivated? Pick all that apply. Question asked to those who said they feel at least some brands are doing things they consider to be political (POL_PER/2-5). General population, 14-mkt avg., and by political leaning. *Indonesia is not included in the global average. †Political leaning was not asked in China, Saudi Arabia or UAE; the Left, Center, and Right segments reflect an 11-mkt avg.



Boycotts of Brands From Foreign Countries

Percent who say

I will avoid or not buy brands from this country	Global 14	Brazil	Canada	China	France	Germany	India	Indonesia *	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	UK	U.S.
<i>I will not buy at least one foreign brand because of the countries in which they are headquartered (net)</i>	78	69	80	87	84	81	82	69	92	64	80	62	95	71	73	74
China	45	22	56		62	55	61	23	82	27	23	25	75	25	47	52
Saudi Arabia	44	47	54	38	66	60	31	15	69	38		28	62	12	52	48
India	42	42	44	60	56	52		45	67	32	33	31	66	29	31	31
UAE	41	41	46	39	64	55	24	13	68	34	28	23	63		45	41
Mexico	35	31	30	44	47	38	28	34	67		39	24	60	30	25	25
Brazil	33		31	39	46	39	28	32	67	25	35	17	58	24	24	24
S. Korea	31	29	27	37	42	38	30	13	68	26	29	21		24	26	24
Japan	22	15	18	51	33	25	15	8		14	22	15	46	14	13	15
Canada	21	20		32	24	16	26	28	40	14	35	13	26	22	8	9
France	21	21	11	28		13	21	29	35	15	41	12	26	29	14	14
UK	21	21	11	33	22	18	19	27	35	21	35	9	23	25		10
U.S.	20	13	10	36	29	22	16	33	34	11	41	12	18	24	12	
Germany	19	22	15	27	16		19	21	35	17	29	12	24	23	10	16

2024 Edelman Trust Barometer Special Report: Brands and Politics. WILL_BUY_FGN. Using the scale below, please indicate your attitude towards buying brands from companies headquartered in each of the following countries. 4-point scale; top 2 box, avoid or will not buy. Question asked of half the sample. General population, 14-mkt avg. *Indonesia is not included in the global average. For this analysis, respondents were shown a list of countries – the same 15 countries included in the survey – and the data shown is a net of all countries being rated, except Indonesia, S. Africa, and the respondent's home country.





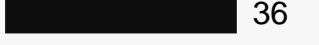

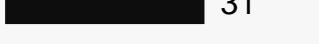
To Earn Trust Abroad, Local Impact Matters

Percent who say

GLOBAL 14 Higher than global average

A foreign brand will earn my trust if it ...

Global top 6 of 13

		Canada	U.S.	Brazil	Mexico	France	Germany	UK	Saudi Arabia	UAE	S. Africa	China	India	Indonesia*	Japan	S. Korea
Creates good jobs in my country	 49	56	53	59	55	55	50	53	43	47	64	23	53	50	28	40
Follows my country's laws	 47	53	49	51	39	55	40	54	41	46	58	35	52	55	39	46
Works with local suppliers	 44	48	40	53	52	51	45	49	34	43	58	29	51	52	23	31
Adapts products to my culture	 36	30	25	43	41	25	29	29	37	43	45	29	49	45	38	47
Respects our government policies	 33	37	34	40	37	20	25	32	36	41	40	37	43	55	14	31
Solves our societal challenges	 31	34	29	35	29	24	23	30	29	35	47	27	44	36	20	28

2024 Edelman Trust Barometer Special Report: Brands and Politics. CUL_SEN. Which of the following are ways that a foreign brand operating in your country could earn your trust? Pick all that apply. Question asked of half the sample. General population, 14-mkt avg. *Indonesia is not included in the global average. Data is showing the top 6 ways to earn trust, globally, with ties broken by decimal.



Trust KPIs Across Countries

Percent who say

I'm more likely to do this on behalf of a brand I fully trust vs one I do not

	Global 14	Brazil	Canada	China	France	Germany	India	Indonesia*	Japan	Mexico	Saudi Arabia	S. Africa	S. Korea	UAE	UK	U.S.
Purchase (net) <i>Buy new products</i> <i>Buy it even if it's more expensive</i>	63	70	60	57	62	60	76	72	52	66	60	73	57	68	59	61
Stay loyal (net) <i>Do not shop around for other brands</i> <i>Even if it makes a mistake</i> <i>Even if others accuse it of wrongdoing</i>	55	50	54	42	68	64	67	61	26	61	55	65	34	62	55	62
Advocate <i>Recommend the fully trusted brand</i> <i>to other people</i>	53	66	49	42	50	48	62	61	33	59	49	70	43	61	50	54



Technical Appendix



2024 Edelman Trust Barometer Special Report: Brands and Politics

Sample Size, Quotas and Margin of Error

Country	Weighed Sample Size ¹	Unweighted Sample Size	Margin of Error – Total Sample ²	Margin of Error – Half Sample ²	Quotas Set On ³
Global 14⁵	14,000	13,957	+/- 1.1 percentage points total sample	+/- 1.5 percentage points half sample	Quotas set at the market level
Brazil	1,000	1,001	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	Age, Gender, Region
Canada	1,000	1,000			
China⁴	1,000	1,000			
France	1,000	1,001			
Germany	1,000	1,001			
India	1,000	1,001			
Indonesia	1,000	1,000			
Japan	1,000	1,000			
Mexico	1,000	1,000			
Saudi Arabia	1,000	955	+/- 4.2 pct pts. total sample	+/- 5.9 pct pts. total sample	
S. Africa	1,000	998	+/- 4.1 pct pts. total sample	+/- 5.8 pct pts. half sample	
S. Korea	1,000	1,002			
UAE	1,000	997			
UK	1,000	1,001			
U.S.	1,000	1,001			

1. Data reported on slides is weighted to the same total base size to ensure each market has an equal effect on the global total. Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.

2. Margin of error is calculated on the unweighted sample sizes collected, at the 99% confidence level.

3. There were additional quotas on ethnicity in the UK and U.S., and on nationality in the UAE.

4. All data collected in China is from the mainland. Regions of Greater China were not surveyed.

5. Indonesia is excluded from the Global average. They will be included once they've been in the survey for two consecutive years and meet standards for inclusion, such as consistent ability to achieve quota targets and sample composition year-over-year.



2024 Edelman Trust Barometer Special Report: Brands and Politics

Countries Included in the Various Global Averages

15 countries surveyed	Global 14 average	Global 13 Excludes China	Global 11 Excludes China, Saudi Arabia, UAE	Global 8
	Used for current year averages and tracking to 2021, 2022, or 2023	Used for current year averages; excludes sensitive countries ¹	Used for current year averages; excludes sensitive countries ¹	Used for current year averages and tracking to Nov 2020
Brazil	Brazil	Brazil	Brazil	Brazil
Canada	Canada	Canada	Canada	Canada
China	China	----	----	----
France	France	France	France	France
Germany	Germany	Germany	Germany	Germany
India	India	India	India	India
Indonesia	----	----	----	----
Japan	Japan	Japan	Japan	Japan
Mexico	Mexico	Mexico	Mexico	----
Saudi Arabia	Saudi Arabia	Saudi Arabia	----	----
S. Africa	S. Africa	S. Africa	S. Africa	----
S. Korea	S. Korea	S. Korea	S. Korea	----
UAE	UAE	UAE	----	----
UK	UK	UK	UK	UK
U.S.	U.S.	U.S.	U.S.	U.S.

1. Because some of the content we ask is deemed politically or culturally 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. Certain data included in this report was not collected in China and is indicated in the global average note of relevant slides. Saudi Arabia and the UAE were also excluded from a subset of questions or attributes and those instances are noted in the footnote of relevant slides.



2024 Edelman Trust Barometer Special Report: Brands and Politics

Survey Languages Used and Internet Penetration by Country

	Languages	Internet Penetration*
Global	-	-
Brazil	Portuguese	81%
Canada	Localized English, Canadian French	93%
China	Simplified Chinese	76%
France	French	85%
Germany	German	92%
India	Localized English	46%
Indonesia	Indonesian	66%

	Languages	Internet Penetration*
Japan	Japanese	83%
Mexico	Localized Spanish	76%
Saudi Arabia	Localized English, Arabic	100%
S. Africa	Localized English, Afrikaans	72%
S. Korea	Korean	97%
UAE	Localized English, Arabic	100%
UK	Localized English	97%
U.S.	English, Localized Spanish	92%

**Data source: [Individuals using the Internet \(% of population\)](#) | Data ([worldbank.org](#)) as of June 11, 2024

Due to disproportionate access to internet in countries with lower internet penetration, the online sample in those countries tends to skew younger, urban, and more affluent.



2024 Edelman Trust Barometer Special Report: Brands and Politics

Generation¹ Age Ranges by Year

	Gen Z <i>Born between 1997-2012</i>	Millennials <i>1981-1996</i>	Gen X <i>1965-1980</i>	Boomers/Silent² <i>1928-1964</i>
Fielded in 2024	Age 18-27	28-43	44-59	60+
2023	Age 18-26	27-42	43-58	59+
2022	Age 18-25	26-41	42-57	58+
2021	Age 18-24	25-40	41-56	57+
2020	Age 18-23	24-39	40-55	56+

1. Age ranges for each generation are determined using the PEW Research Center's definitions and based on the year in which the data was collected: <https://www.pewresearch.org/short-reads/2019/01/17/where-millennials-end-and-generation-z-begins/>

2. Due to low sample sizes, the Boomer and older generations are combined



2024 Edelman Trust Barometer Special Report: Brands and Politics

HOW WE CALCULATED POLITICALLY DRIVEN BUYERS

Respondents were asked a series of questions regarding the role their political beliefs played in their brand purchasing decisions. The Politically Driven Buyer (PDB) scale was created by averaging respondents' answers to the three 9-point agree/disagree scale items, shown in the table to the right.

- Nonpolitically driven buyers were those that scored between 1 – 4.99 on the PDB scale, meaning on average they disagreed with these statements.
- Respondents who scored between 5.00 – 9.00 on the PDB scale were classified as politically driven buyers, meaning on average they saw themselves reflected at least to some extent in these statements

Respondents were asked:

Please indicate how much you agree or disagree with the following statements

1.	I have stopped buying one brand and started buying another because I liked the politics of one more than the other
2.	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.
3.	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



**Full
Question
Text**



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Politically Driven Buying: 6 in 10 Buy Brands to Express Their Politics

BDB_Q17: Please indicate how much you agree or disagree with the following statements.

Shortened	Full
I have switched brands over politics	I have stopped buying one brand and started buying another because I liked the politics of one more than the other
My brand choices express my political opinions	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.
I have boycotted a brand because it stayed silent on a political issue	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



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Brand Nationalism: Israel-Hamas Conflict Sparks Boycotts

BRD_OPIN1: Please indicate how much you agree or disagree with the following statements.

Shortened	Full
I am boycotting brands that support a side on the Israel-Hamas conflict	I am boycotting brands that have expressed support for one side over another in the current conflict between Israel and Hamas
I am buying my country's brands instead of foreign brands more often today than I was a year ago	I am buying my country's brands instead of foreign brands more often today than I was a year ago



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Need for Trust Expands: Trust in Parent Company Rises as Critical Purchase Criteria

TRUST_IMP: When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely nice to have.

Shortened	Full
Good value for the money	It offers good value for the money
Offers the best quality	It offers the best quality
I trust it	I trust it
High quality customer service	It offers high quality customer service
Has a good reputation	It has a good reputation
Convenient to find, buy, and use	It is convenient to find, buy and use
I love it	I love it
I trust the company that owns the brand	I trust the corporation that owns the brand
Has a small climate impact	It has as small a negative impact on the environment as possible
Treats its employees well	It treats its employees well
Headquartered in my country	It is a domestic brand headquartered in my country
Reflects me as a person	It is a good fit with who I am as a person
Has a clear mission	It has a mission or purpose in the world beyond making a profit



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Everyday Brand Actions Seen as Political

WHAT_POL: Which of the following brand actions, if any, do you consider to be political or politically motivated?

Shortened	Full
Take a stand on issues	Publicly expressing an opinion or taking a stand on a contentious social issue of any kind
Encourage voting	Encouraging people to vote in elections
Hire influencers with political opinions	Partnering on an ad campaign with an influencer, celebrity or athlete who has at any time expressed a political opinion, even if their political opinion is not relevant to the campaign itself
Use social platforms that host extremists	Being active on social media platforms that also support or host extremist views
Work on regulations	Working with the government to shape and develop effective regulations for their industry
Recruit diverse employees	Having a hiring strategy that aims to attract, source, and retain employees that come from a range of diverse religious, gender, ethnic, or socioeconomic backgrounds
Advertise near political news	Placing advertisements for their brand near or next to news articles about political topics
Reduce climate impacts	Having a strategy in place to reduce the extent to which its operations, products, and services are contributing to climate change
Sponsor the Olympics	Being a sponsor of the Olympic Games



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Silence Is Political: When Brands Say Nothing, 1 in 2 Assume the Worst

BRD_SILENT: If a brand does not mention in its advertising or public communications the things it is doing to address issues like climate change, increasing diversity within its organization, equity and racial justice, or retraining workers who lose their jobs due to automation, which of the following are you most likely to assume is true?

Shortened

If a brand doesn't communicate its actions to address societal issues, I assume it is doing nothing or hiding something (net)

Full

The brand is ignoring these issues and so has nothing to talk about

The brand has something negative to hide regarding what it is doing in these areas and is trying to avoid the topic



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Brands Expected To Do More, Not Less

BRD_BND: Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more.

Shortened	Full
Climate	Taking action to reduce its climate impacts
Fair pay	Taking steps to address economic inequality by ensuring their workers and employees have fair pay
Retraining	Doing the workforce reskilling and retraining necessary to keep people employable whose jobs are being eliminated or greatly altered by automation and artificial intelligence
Misinformation	Controlling the malicious spreading of misleading and false information and ensuring the availability of trustworthy information
Public health	Encouraging people to engage in behaviors that would improve public health outcomes, such as receiving vaccinations
Diversity	Having a marketing strategy that aims to ensure that people from diverse backgrounds are consistently represented
Voter participation	Encouraging people to vote in elections
Weigh in on politics	Weighing in on political issues and debates



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Anchor Brand Action in Shared Values

VAL_MATCH_IMP: . Please indicate for which of the following brand categories a shared set of values between you and the brand is an important purchase consideration.

Shortened	Full
Food and beverage (avg)	Food and beverage Food brands that I use everyday Beverage brands that I use everyday



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Avoid Contextual Naïveté: Map Your Brand's Permission to Act Against the Local Cultural Context

BRD_BND: Think about brands in general and their current level of engagement in addressing societal issues and challenges. When it comes to each of the following, please indicate if you think brands are going too far and overstepping what they should be doing, are doing just the right amount in regard to this activity, or are not going far enough in its actions and should be doing more.

Shortened	Full
Climate	Taking action to reduce its climate impacts
Fair pay	Taking steps to address economic inequality by ensuring their workers and employees have fair pay
Retraining	Doing the workforce reskilling and retraining necessary to keep people employable whose jobs are being eliminated or greatly altered by automation and artificial intelligence
Misinformation	Controlling the malicious spreading of misleading and false information and ensuring the availability of trustworthy information
Public health	Encouraging people to engage in behaviors that would improve public health outcomes, such as receiving vaccinations
Diversity	Having a marketing strategy that aims to ensure that people from diverse backgrounds are consistently represented
Voter participation	Encouraging people to vote in elections
Weigh in on politics	Weighing in on political issues and debates



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Expert and Everyday Voices Most Credible; Ensure Brand Ambassadors Live Your Values

ABILITY_SPK_A: If a brand were to use each of the following as their spokesperson/brand ambassador, how credible or believable would you consider them to be?

Shortened	Full
Person like myself	A person like yourself who regularly uses the brand
Scientist, academic expert	A scientist or academic expert
Brand employee	A regular employee of the brand
Brand CEO	The CEO of the company that owns the brand
Celebrity, sports star	A celebrity or sports star speaking as themselves



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Brand Values are Made and Broken in the Media; Don't Rely on Advertising Alone to Convince Me of Your Impact

BRD_CHNL: Among the sources of information listed below, select the one that best fits each of the following descriptions.

Shortened	Full
The news media	The news media
Search	Search or search engines
My personal experiences	My own direct, personal experiences or interactions with the brand or product
Online reviews	Customer/user reviews posted online
Advertising	The brand's advertising
Direct communication	A direct communication (e.g., post, blog, email, IM, text) from the brand itself
Special interest media	Special interest media (e.g., media that focuses on things like hobbies, specific topics like technology or automobiles, or lifestyle topics like home or pets or travel)
Influencers	An influencer that I follow
Someone on my social media	Someone in my social media network or in an online community I am a member of



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

For Gen Z, Social Media is the Battleground for Trust

CON_HEAR: How did you first learn about the [PIPE IN ISSUE FROM WHY_TRU_LOSS (ONLY BOLDED PORTION)]?

Shortened	Full
Social media	I saw someone talking or posting about it on social media
My personal experience	I came across it myself
In the news	I read about it in a newspaper or saw it on the news
Family and friends	I heard about it from family or friends
Politicians	A politician brought it to my attention
Consumer protection group	A consumer protection group made a statement about it
Religious leaders	A religious leader brought it to my attention
Brand competitors	The brand's competitors were talking about it



2024 Edelman Trust Barometer Special Report: Brands and Politics

Full Text For Answer Choices Abbreviated

Consumers Will Protect the Brands They Trust

TRUST_KPI: What are you more likely to do on behalf of a brand that you fully trust versus one that you DO NOT fully trust?

Shortened	Full
Buy new products	Buy new products or services the fully trusted brand introduces
But it even if it's more expensive	Buy the fully trusted brand even if it is not as cheap as some of my other options
Do not shop around for other brands	Stay loyal to the fully trusted brand, and not be actively shopping around for another brand that I might like better
Even if it makes a mistake	Stay loyal to the fully trusted brand even if it makes a mistake or something goes wrong
Even if others accuse it of wrongdoing	Stay loyal to the fully trusted brand even if I hear others accuse it of wrongdoing



Slide 3 Image Credits

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- 1. A woman casts her ballot to vote in India's general election. *Idrees Mohammed/AFP via Getty Images*
- 2. A supporter holds a banner with the image of Mexico's presidential candidate for the ruling Morena party, Claudia Sheinbaum, at her campaign rally in Mexico City. *Pedro Pardo/AFP via Getty Images*
- 3. Free Palestine' graffiti is daubed on a subway stop as a pro-Israel rally is held outside of Columbia University in New York. *Adam Gray via Getty Images*
- 4. Climate activists from "Reclaim The Future" protest outside of the Swedish parliament in Stockholm, Sweden. *Michael Campanella/Getty Images*
- 5. TikTok's booth at an exhibition in Hangzhou, Zhejiang province, China. *CFOTO/Future Publishing via Getty Images*

