

2024 Edelman Trust Barometer

Germany Report



DUBAI 2023




2024 Edelman Trust Barometer

Methodology

Annual online survey in its 24th year

Fieldwork conducted: Nov 3 – Nov 22, 2023



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

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 1,109 to 1,500.
 28-market global data margin of error: General population +/- 0.7 percentage points (n=32,492)
 Country-specific data margin of error: General population +/- 3.3 to 3.9 percentage points (varies by country based on sample size, n=1,109 to n=1,500)
 Margin of error is calculated at the 99% confidence level

Global averages

Unless otherwise indicated, global averages are composed of all 28 countries surveyed.

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

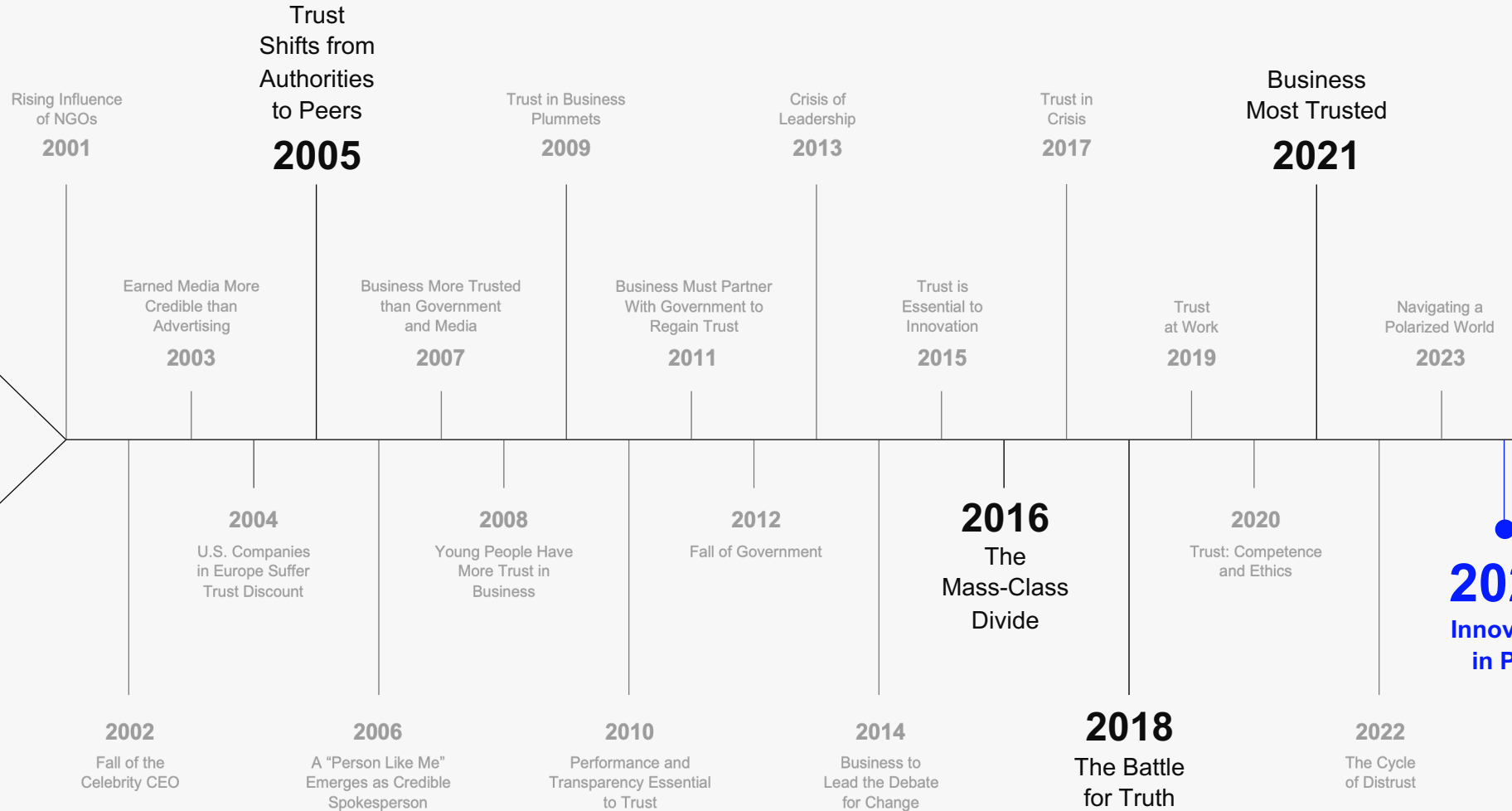
Throughout the report, question text has been edited for readability.

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

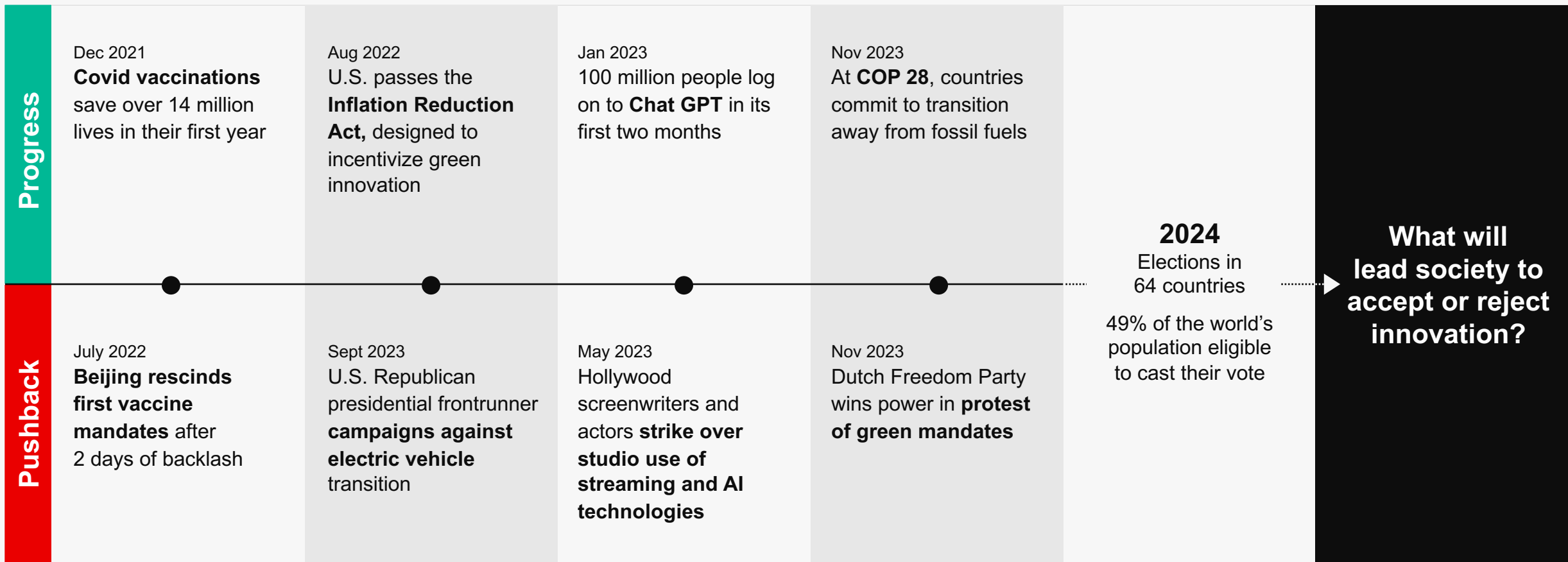


24

Years of Trust:
power shifts,
divisions deepen



A Global Referendum on Innovation in Society



Top row, left to right: [The Lancet](#), [Washington Post](#), [Reuters](#), [Reuters](#)

Bottom row, left to right: [Reuters](#), [CNN](#), [AP News](#), [Politico](#)

Far right: [Time](#)



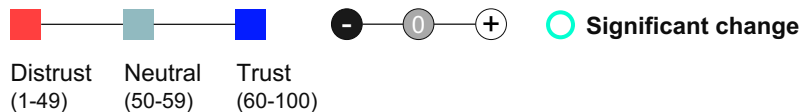
The Decline of Authority



Trust Index 2023 to 2024: Developing Countries Lead on Trust

Trust Index

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



2024 Trust Index among

Developing countries **63**

Developed countries **49**

2024 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, 28-mkt avg., and by developed and developing countries. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Due to a translation inconsistency in France, the 2023 Trust Index has been imputed using a model. For more details, please see the Technical Appendix.

2023 General population

| | |
|-----------|------------------|
| 55 | Global 28 |
| 83 | China |
| 75 | Indonesia |
| 74 | UAE |
| 73 | India |
| 71 | Saudi Arabia |
| 66 | Singapore |
| 66 | Thailand |
| 63 | Kenya |
| 62 | Malaysia |
| 61 | Mexico |
| 56 | Nigeria |
| 54 | Netherlands |
| 53 | Brazil |
| 52 | Canada |
| 51 | Colombia |
| 50 | Italy |
| 49 | Sweden |
| 48 | Australia |
| 48 | Ireland |
| 48 | U.S. |
| 47 | France |
| 47 | S. Africa |
| 46 | Germany |
| 44 | Spain |
| 43 | UK |
| 42 | Argentina |
| 38 | Japan |
| 36 | S. Korea |

2024 General population

| | |
|-----------|------------------|
| 56 | Global 28 |
| 79 | China |
| 76 | India |
| 74 | UAE |
| 73 | Indonesia |
| 72 | Saudi Arabia |
| 70 | Thailand |
| 68 | Malaysia |
| 67 | Singapore |
| 64 | Kenya |
| 61 | Nigeria |
| 59 | Mexico |
| 56 | Netherlands |
| 53 | Brazil |
| 53 | Canada |
| 52 | Australia |
| 50 | Italy |
| 49 | S. Africa |
| 49 | Sweden |
| 47 | Colombia |
| 47 | France |
| 47 | Ireland |
| 46 | Spain |
| 46 | U.S. |
| 45 | Germany |
| 43 | S. Korea |
| 39 | Argentina |
| 39 | Japan |
| 39 | UK |

Greatest changes in

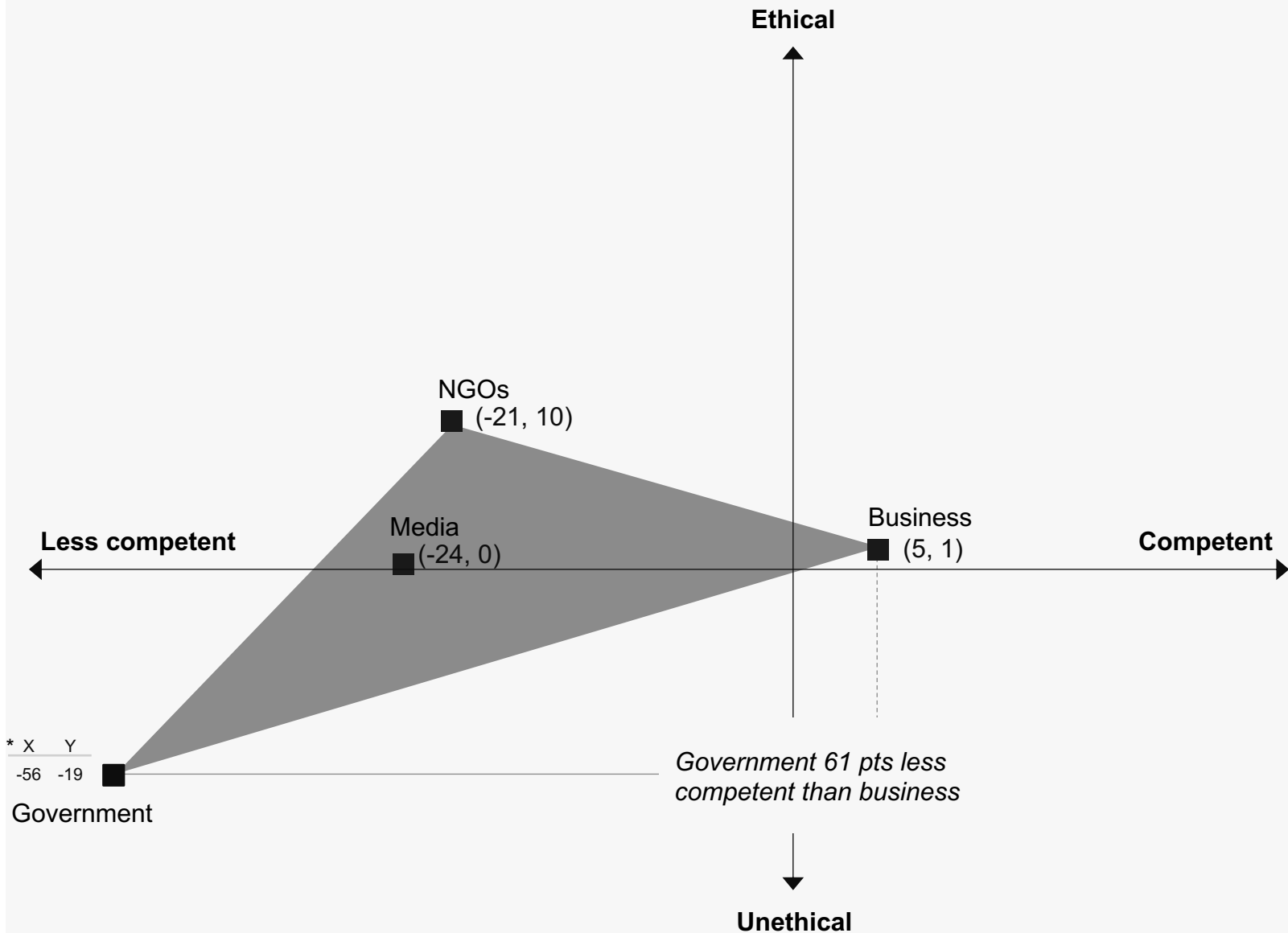
| | |
|-----------|-----------|
| S. Korea | +7 |
| Malaysia | +6 |
| Nigeria | +5 |
| Thailand | +4 |
| Australia | +4 |
| China | -4 |
| Colombia | -4 |
| UK | -4 |

*UK now among
least-trusting countries*



In Germany, Institutions Out of Balance: Government Seen as Far Less Competent and Ethical than Business

(Competence score, net ethical score)



2024 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]_PER_DIM/1-4. Media and NGOs were only asked of half the sample.



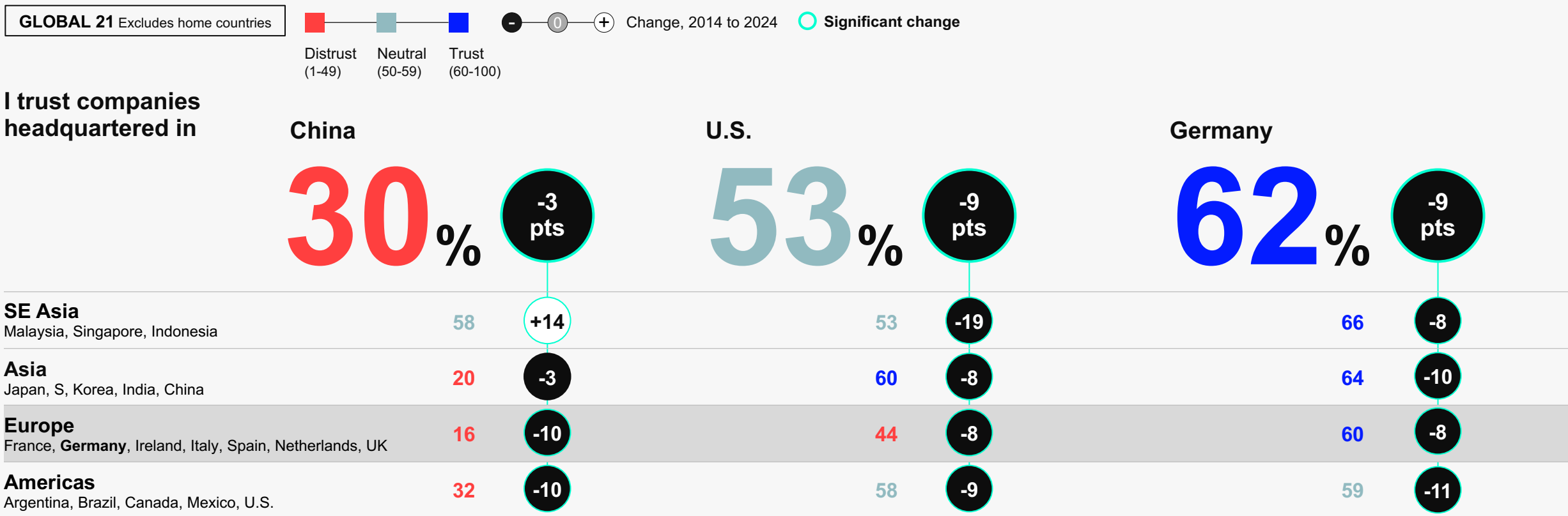
The competence score is a net based on TRU_3D_[INS]/1. Media and NGOs were only asked of half the sample. General population, Germany. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

*Coordinates provided for reference: government point not shown to scale



10-Year Shift: Less Trust for Companies Headquartered in Global Powers

Percent trust in companies headquartered in each country, among respondents from outside each country being rated



2024 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 21-mkt avg., and by region. Data excludes respondents from the country being rated. Ten-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Nearly 1 in 2 Worry Establishment Leaders Not Trusted to Tell Us the Truth

Percent who worry, in Germany

● 0 ● + Significant change

49%

+3 pt

Change, 2023 to 2024

Government leaders

46%

+2 pts

Change, 2023 to 2024

Business leaders

46%

-3 pts

Change, 2023 to 2024

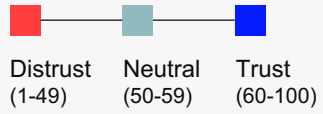
Journalists and reporters

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

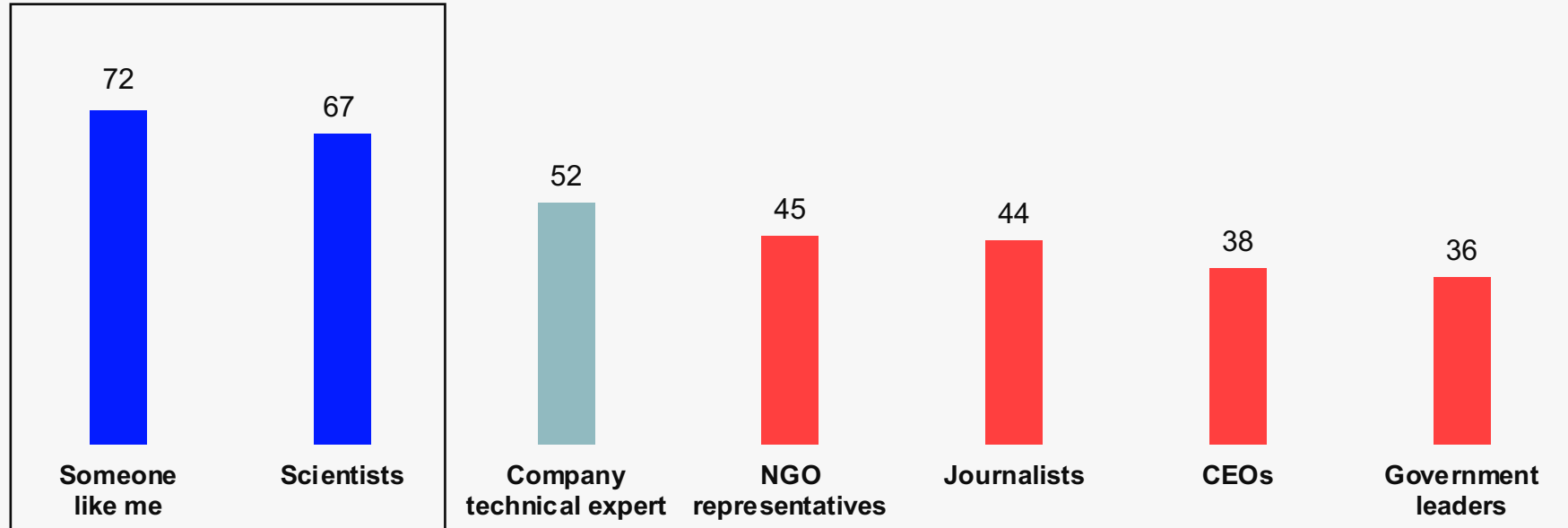


Dispersion of Authority: Peers on Par With Scientists

Percent trust, in Germany



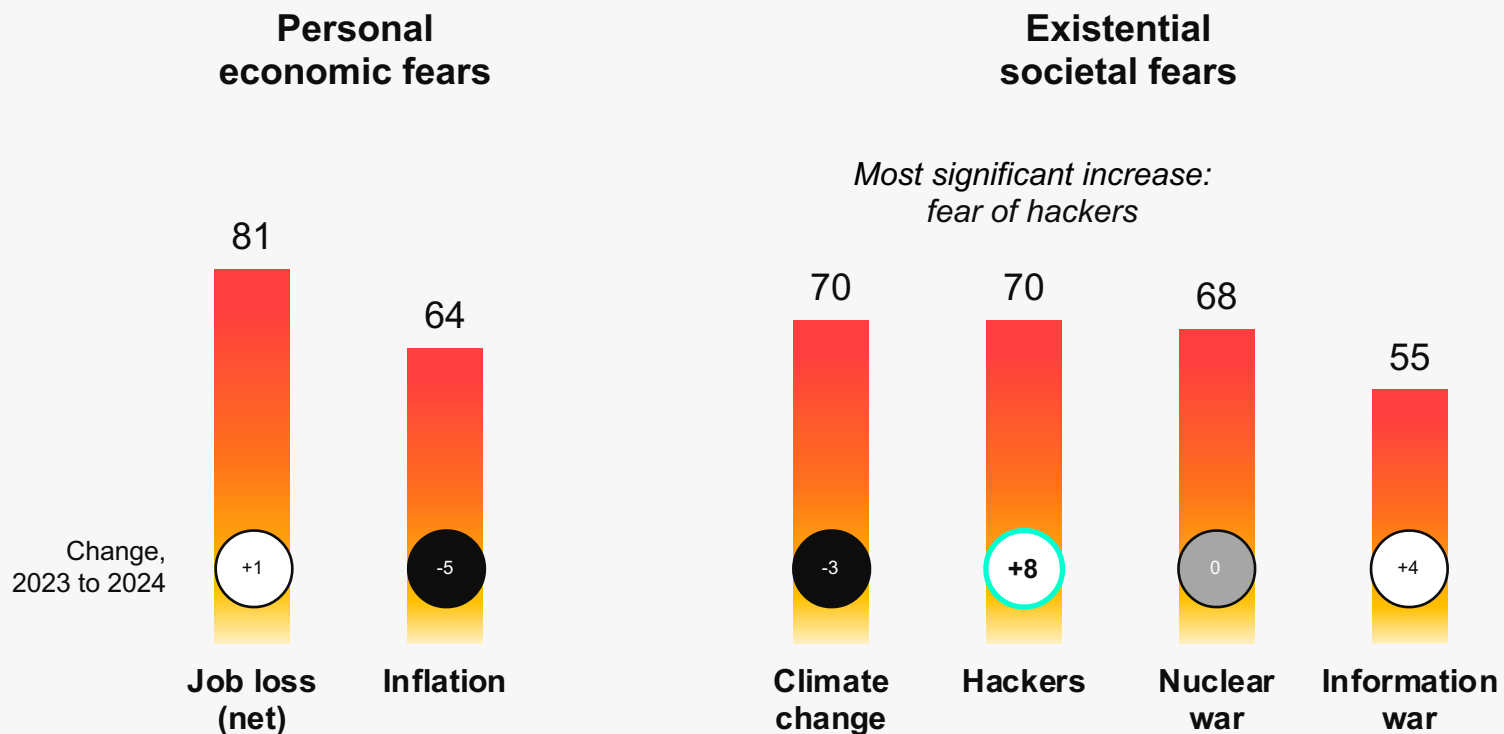
I trust each to tell me the truth about new innovations and technologies



Societal Fears on Par with Personal Economic Fears

In Germany, percent who worry about...

● ○ + ○ Significant change

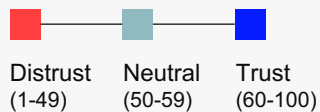


2024 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Some attributes asked of half the sample. General population, Germany. 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. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



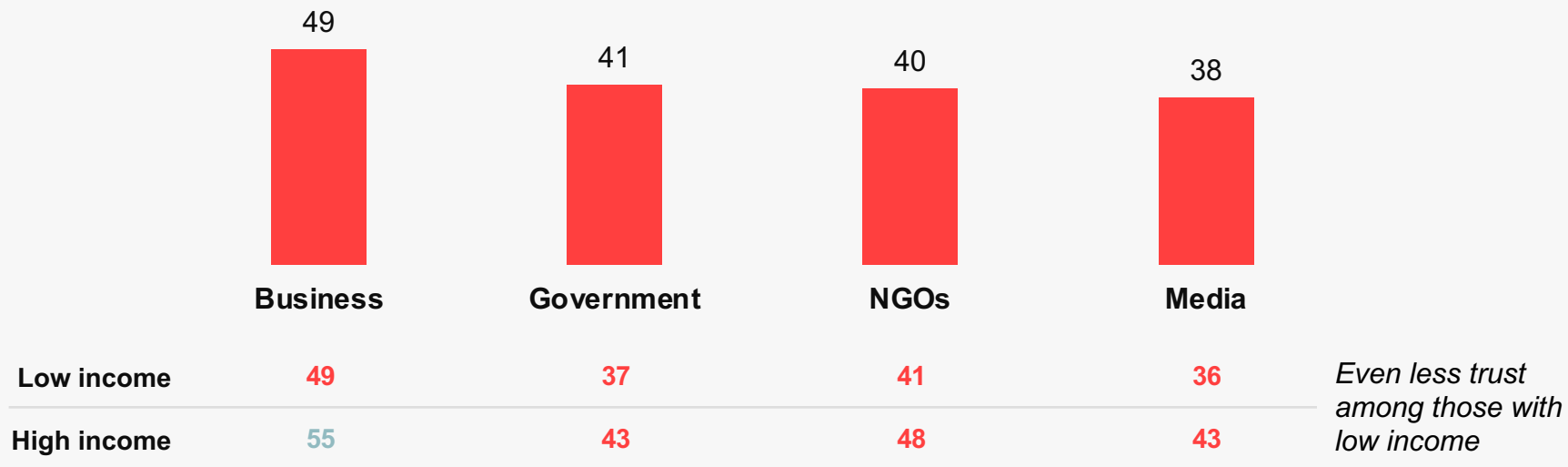
All Institutions Distrusted to Integrate Innovation into Society

Percent trust, in Germany



I trust each with the introduction of innovations into society, ensuring they are

- *Safe*
- *Understood by the public*
- *Beneficial*
- *Accessible*

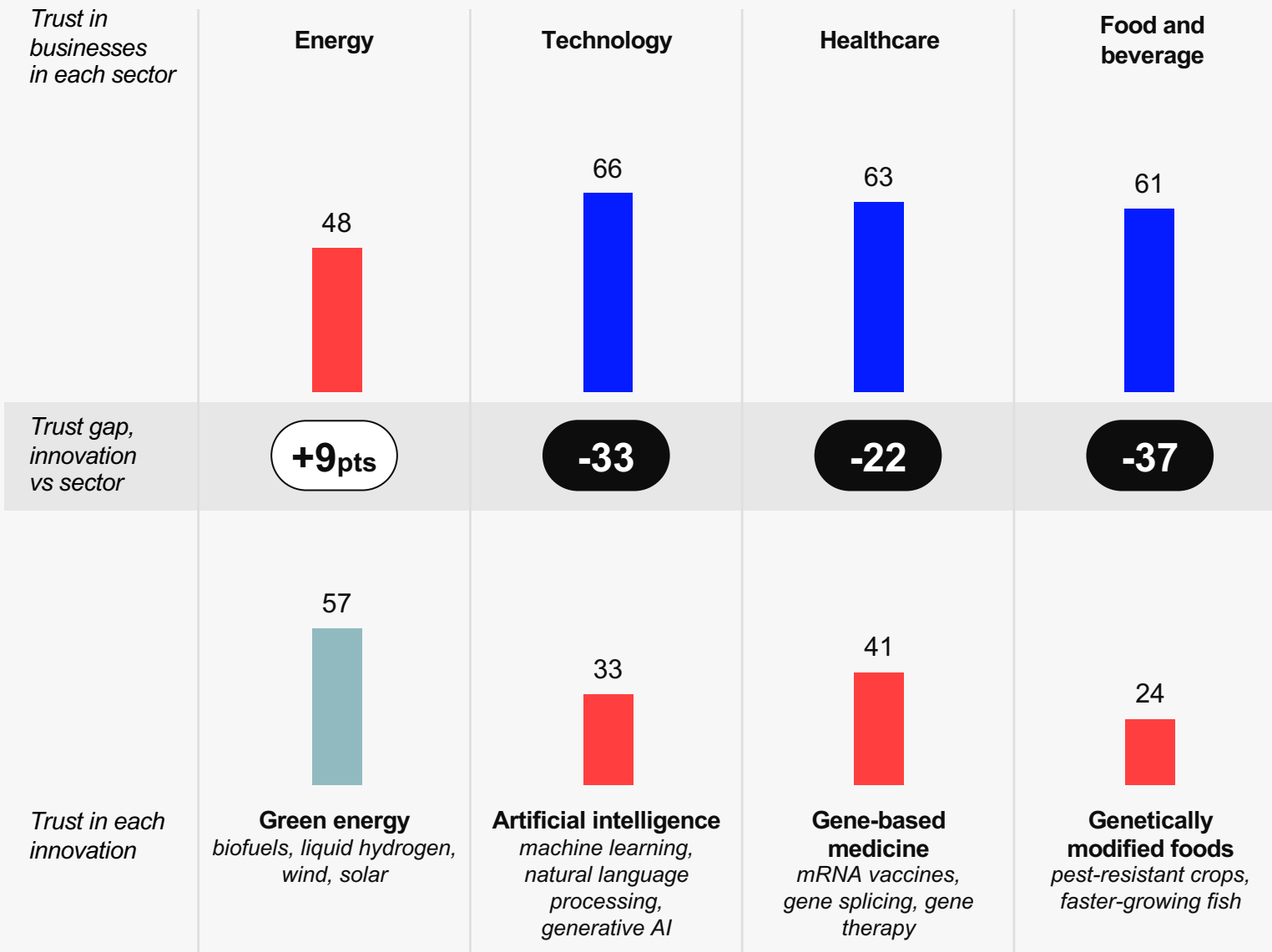
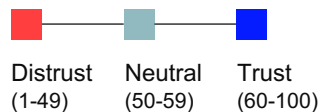


2024 Edelman Trust Barometer. TRU_INS_TCNG. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right when it comes to ensuring that the introduction of new technologies and innovations into society is well-managed (e.g., they are safe, understood by the public, beneficial to society as a whole, and accessible to the people who need them). 9-point scale; top 4 box, trust. Question asked of half the sample. General population, Germany, and by income.



Trust in Industry Sectors Does Not Guarantee Trust in Industry Innovations

Percent trust, in Germany

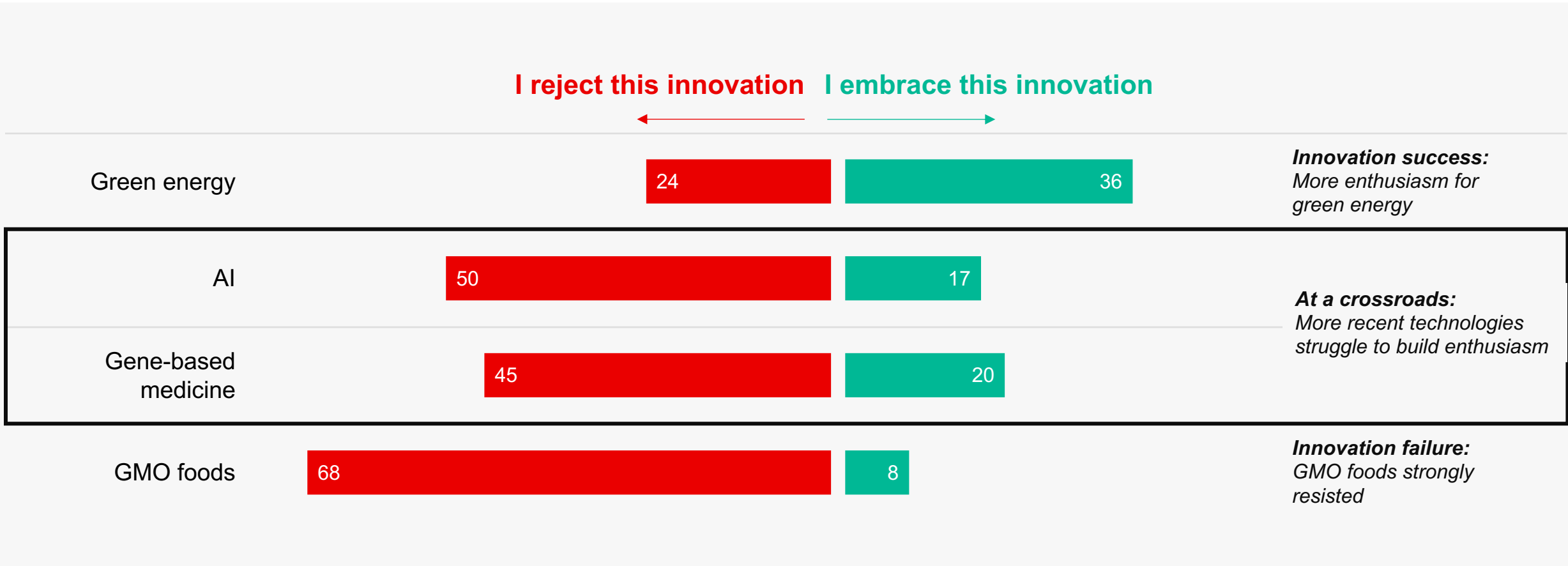


2024 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. TEC_TRU. How much do you trust each of these technologies? 9-point scale; top 4 box, trust. Question asked of half the sample. General population, Germany.



Acceptance of Innovation at Stake

Percent who say, in Germany



Innovation is on the Ballot



Government Lacks Competence to Regulate Emerging Innovations

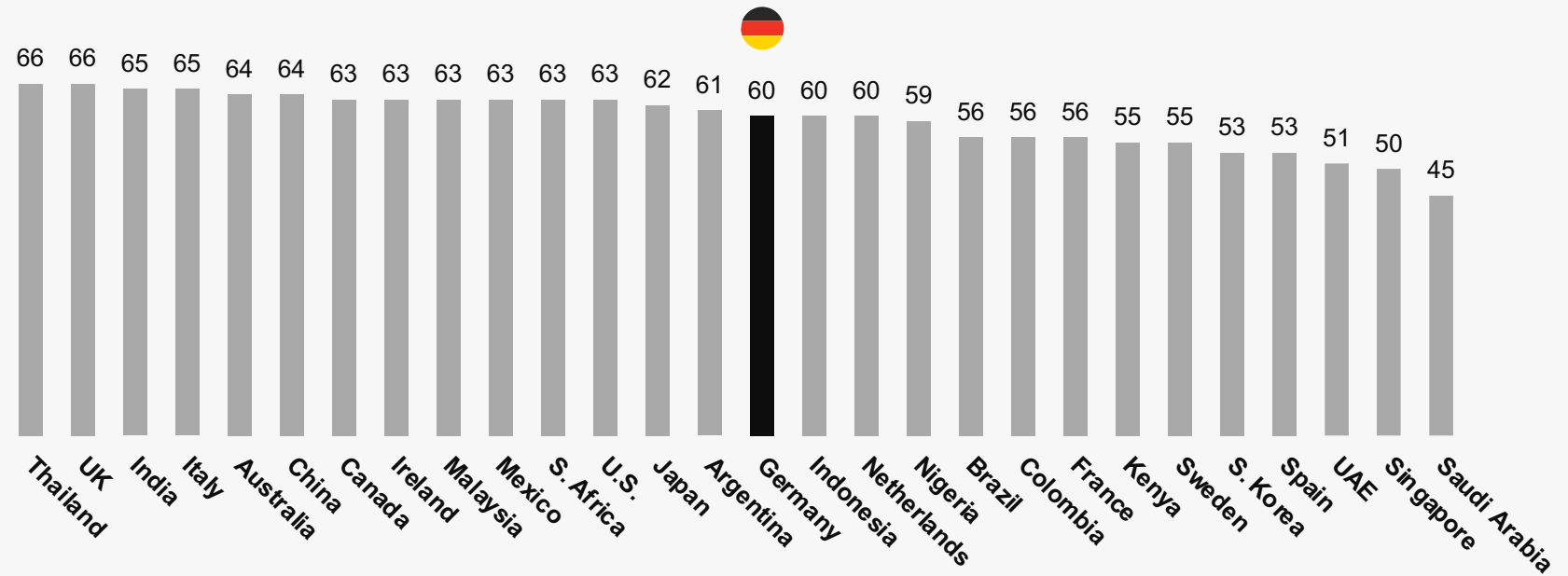
Percent who say this is true

GLOBAL 28

Government regulators **lack adequate understanding of emerging technologies to regulate them effectively**

Majority in 26 of 28 countries say government not regulating well

59%



2024 Edelman Trust Barometer. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. General population, 28-mkt avg.



Concerned Government Has Too Much Influence on Science

Percent who agree, in Germany

Science has become politicized in this country

Government and organizations that fund research have **too much influence** on how science is done

55%

54%



Globally, Nearly 2x More Likely to Fear Innovation Poorly Managed

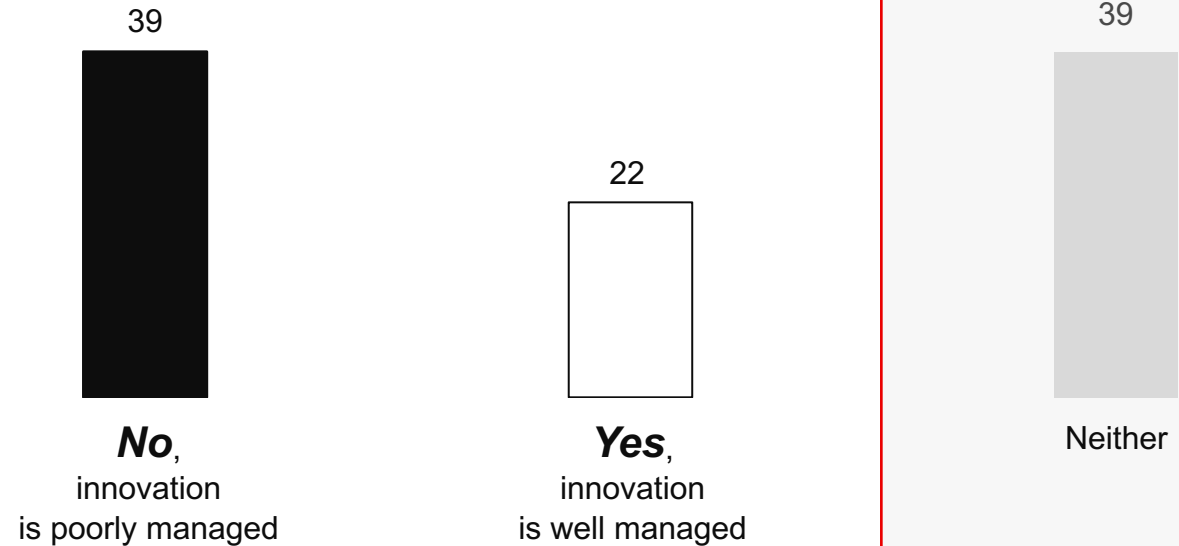
On average, percent who say

GLOBAL 28

In thinking about innovation –

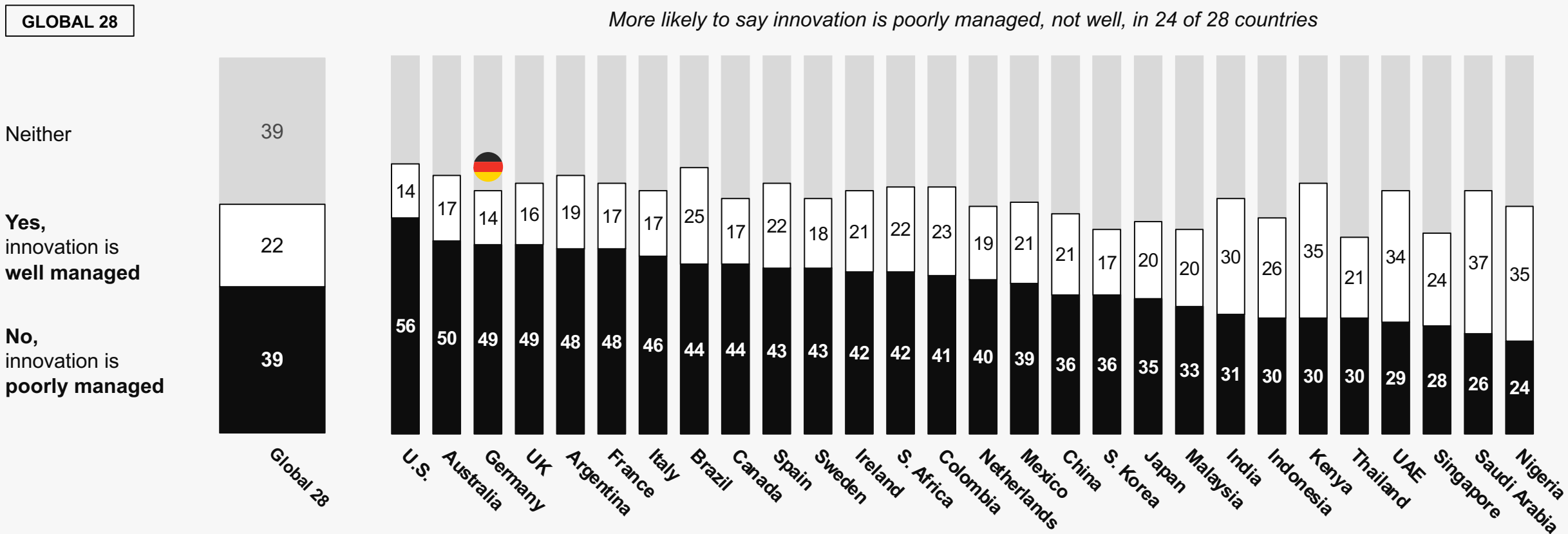
- *Do I trust how **business** and **NGOs** introduce innovations into society?*
- *Can **government** regulate new technologies?*
- *Is science independent of **politics** and **money**?*

Nearly **2x more likely**
to say innovation is poorly managed vs well managed



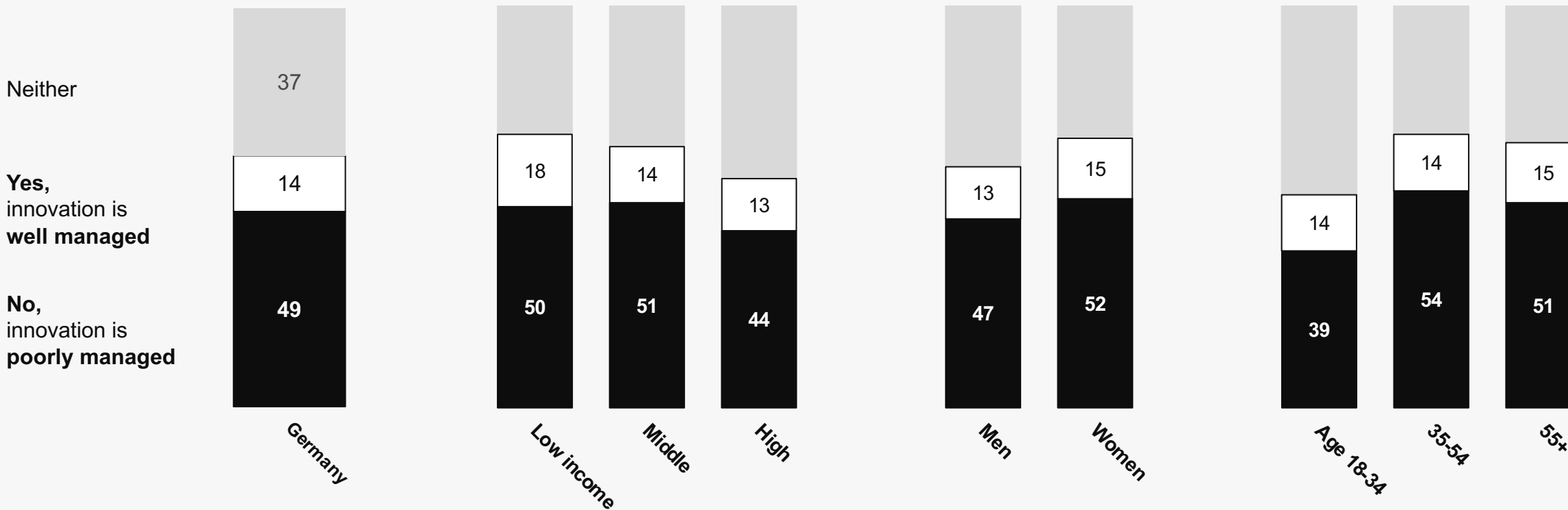
Nearly All Countries More Likely to Believe Innovation is Mismanaged Rather Than Well Managed

On average, percent who say



In Germany, Concern Innovation is Mismanaged Shared Across Income, Gender, and Age

On average, percent who say, in Germany

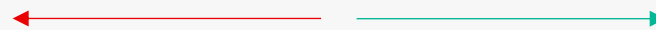


When Institutions Mismatch Innovation: More Rejection, Less Enthusiasm for Emerging Technologies

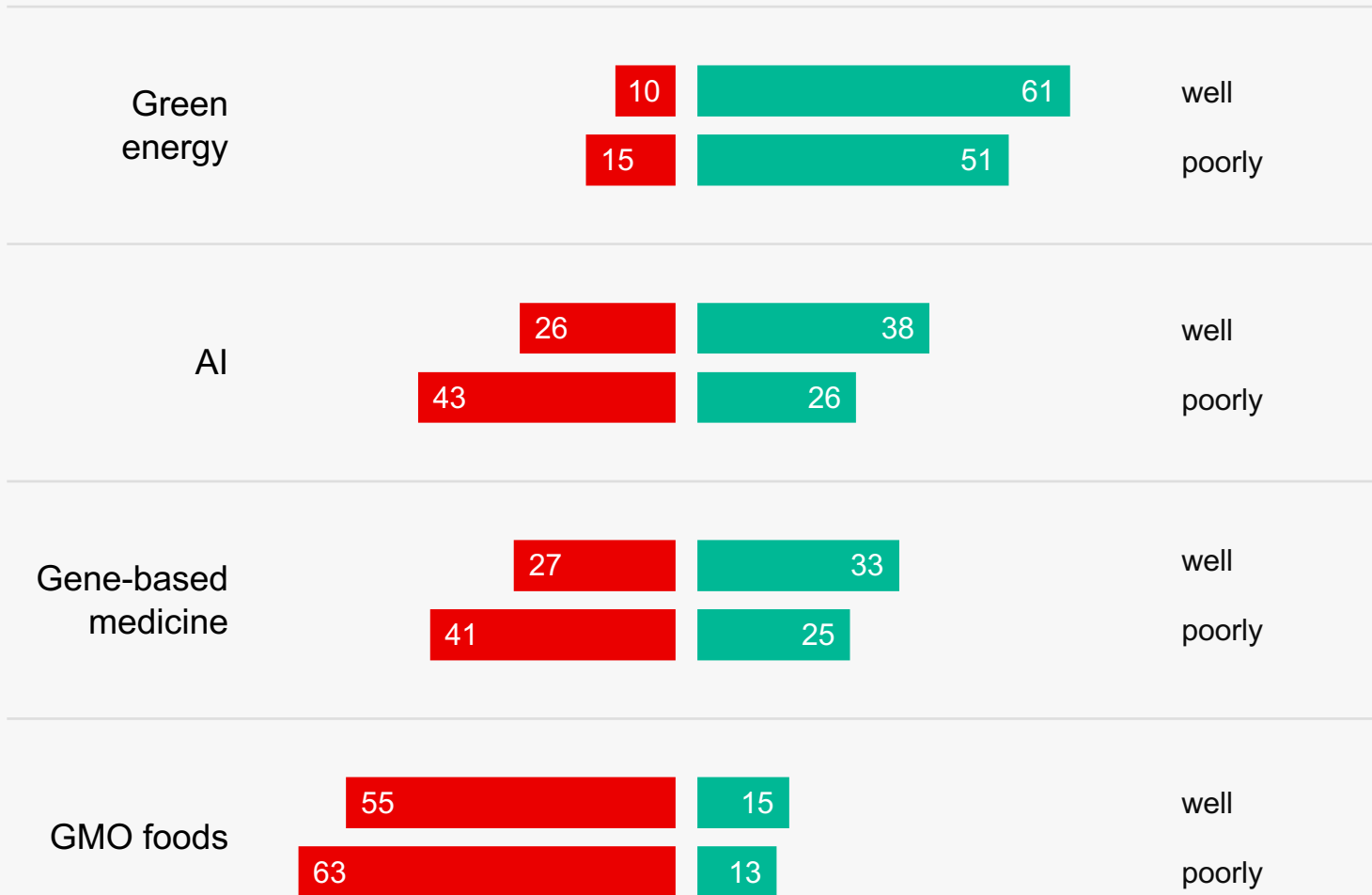
Percent who say

GLOBAL 28

I reject this innovation I embrace this innovation



Innovation is managed ...



2024 Edelman Trust Barometer. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; bottom 2 box, resistant or hesitant = reject; top 2 box, enthusiastic or passionate = embrace. General population, 28-mkt avg., by the innovation management scale. For a full explanation of how the Innovation Management Scale was developed, please see the Technical Appendix.



In Western Democracies, Resistance to Innovation Is Political

Percent of respondents who reject innovation, based on their individual average acceptance rating across green energy, AI, gene-based medicine, and GMO foods

GLOBAL 21

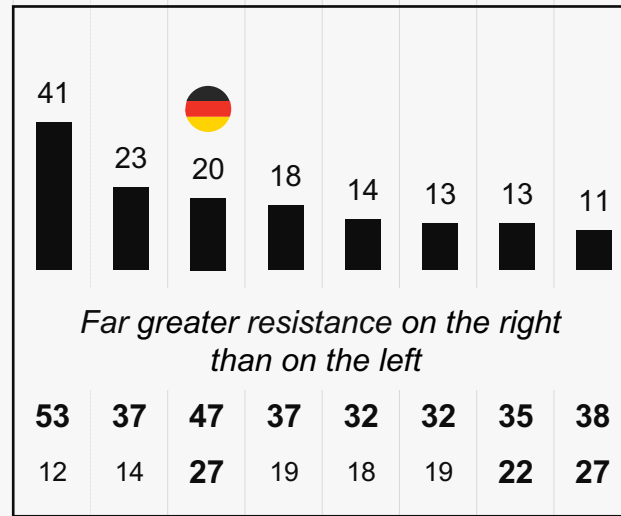
Difference in innovation rejection
between those who lean right or left politically

Political leaning

Right

Left

7 pts



Far greater resistance on the right than on the left

bold font indicates
20% or more reject innovation

2024 Edelman Trust Barometer. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; Data is showing the percent of respondents who, on average, rejected innovation when looking at the mean scores "acceptance ratings" for each of the four innovations, and the differences between those who lean left or right politically. Those that rejected innovation averaged a score between 1 and 2.49 on the 5-point scale. General population, 21-mkt avg., by political leaning. Political leaning is not asked in China, Saudi Arabia, Thailand or the UAE. Indonesia, Japan, and Singapore are excluded from the analysis due to having sample sizes too low to report (less than n100).



When Institutions Mismanage Innovation, We Feel Both Technology and Society Are Leaving Us Behind

Among those in Germany who say innovation is poorly managed, percent who say

**Technology is changing too quickly,
in ways that are not good for people like me**

**Our society is changing too quickly
and not in ways that benefit people like me**

Among those who say
innovation is
poorly managed

45%

70%



2024 Edelman Trust Barometer. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. General population, Germany, by the innovation management scale. For a full explanation of how the Innovation Management Scale was developed, please see the Technical Appendix.



The base size for the "well managed" segment is too low to report (less than n100 respondents).

When Institutions Mismanage Innovation, Fairness and Capitalism in Question

Among those in Germany who say innovation is poorly managed, percent who say

The system is
biased in favor of the rich

Capitalism as it exists today
does more harm than good in the world

Among those who say
innovation is
poorly managed

85%

57%



2024 Edelman Trust Barometer. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Attribute asked of half the sample. General population, Germany, by the innovation management scale. For a full explanation of how the Innovation Management Scale was developed, please see the Technical Appendix.



The base size for the "well managed" segment is too low to report (less than n100 respondents).

A Reset for Science in Society

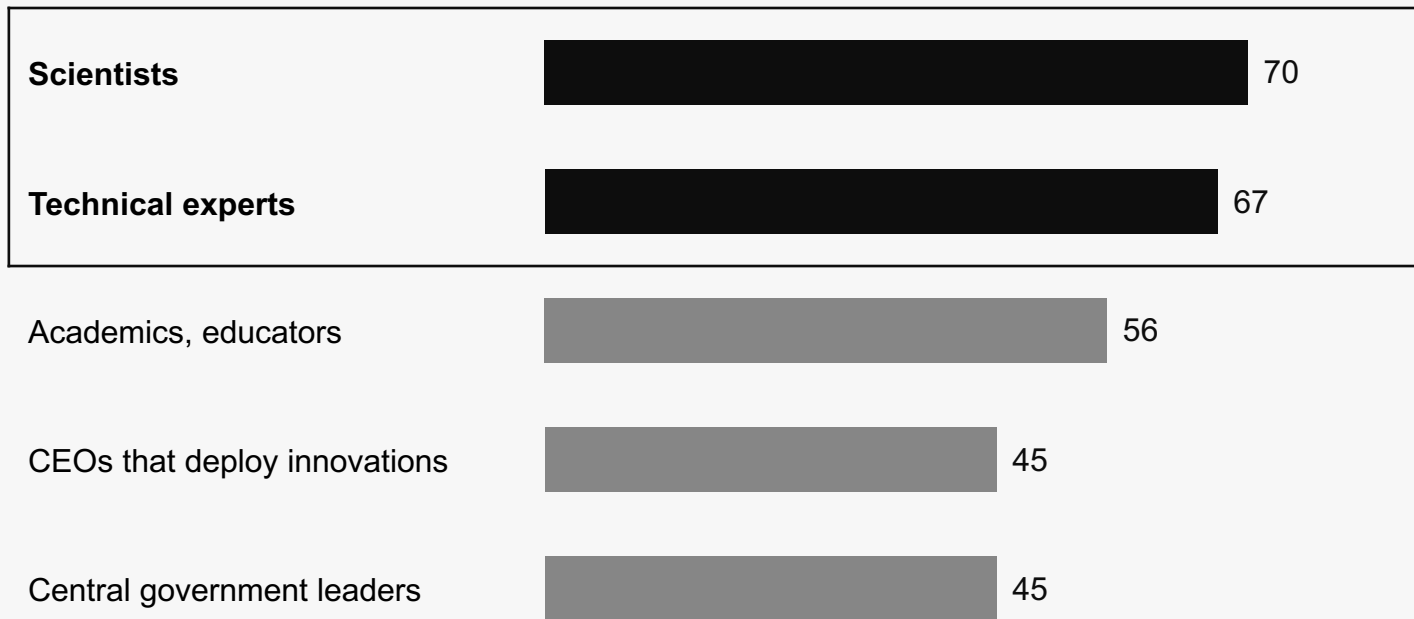


Scientists and Experts Expected to Lead on Implementation of Innovation

Percent who say, in Germany

I believe each **should have a big role** in managing the introduction of innovation

Showing top 5 of 11 items



To Earn My Acceptance, Show Me the Innovation Is Vetted by Scientists and Ethicists

Average acceptance rating

for each innovation

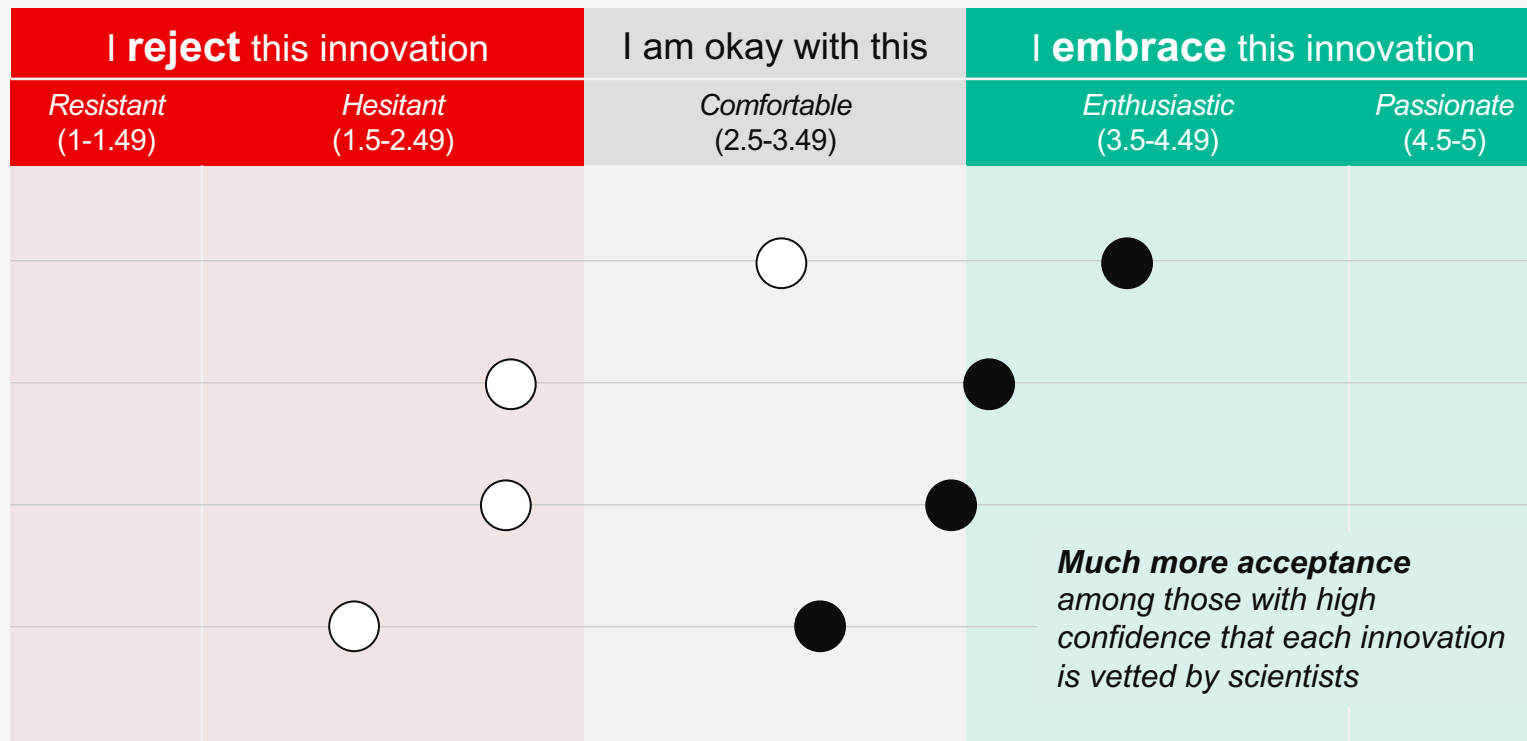
GLOBAL 28

Among those who have

○ low ● high

confidence that each innovation has been **evaluated by scientists and ethicists**

Green energy
AI
Gene-based medicine
GMO foods



2024 Edelman Trust Barometer. TEC_TST. How confident are you that these technologies have been adequately tested, evaluated, and assessed by scientists, ethicists, and other experts? 5-point scale; top 2 box, high confidence; bottom 2 box, low confidence. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of confidence. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



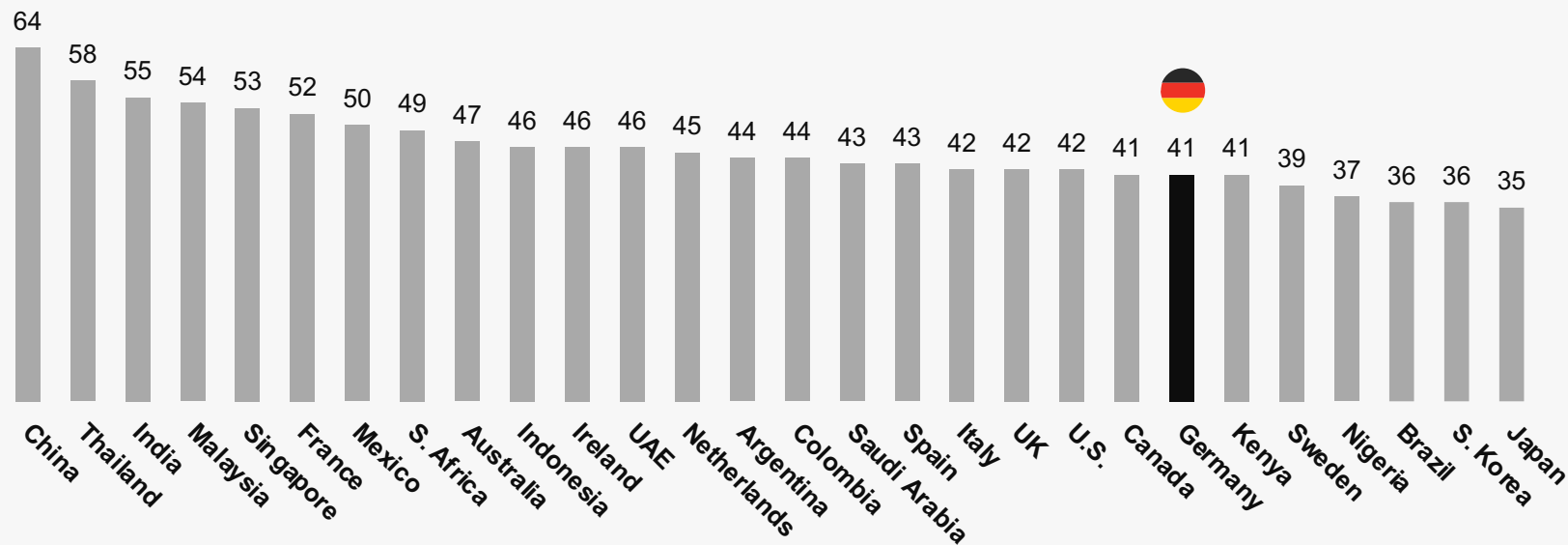
Make the Science Transparent and Accessible to the Public

Percent who agree

GLOBAL 28

Scientists do not know how to communicate with people like me

45%



2024 Edelman Trust Barometer. CHG_AGR. 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, 28-mkt avg.

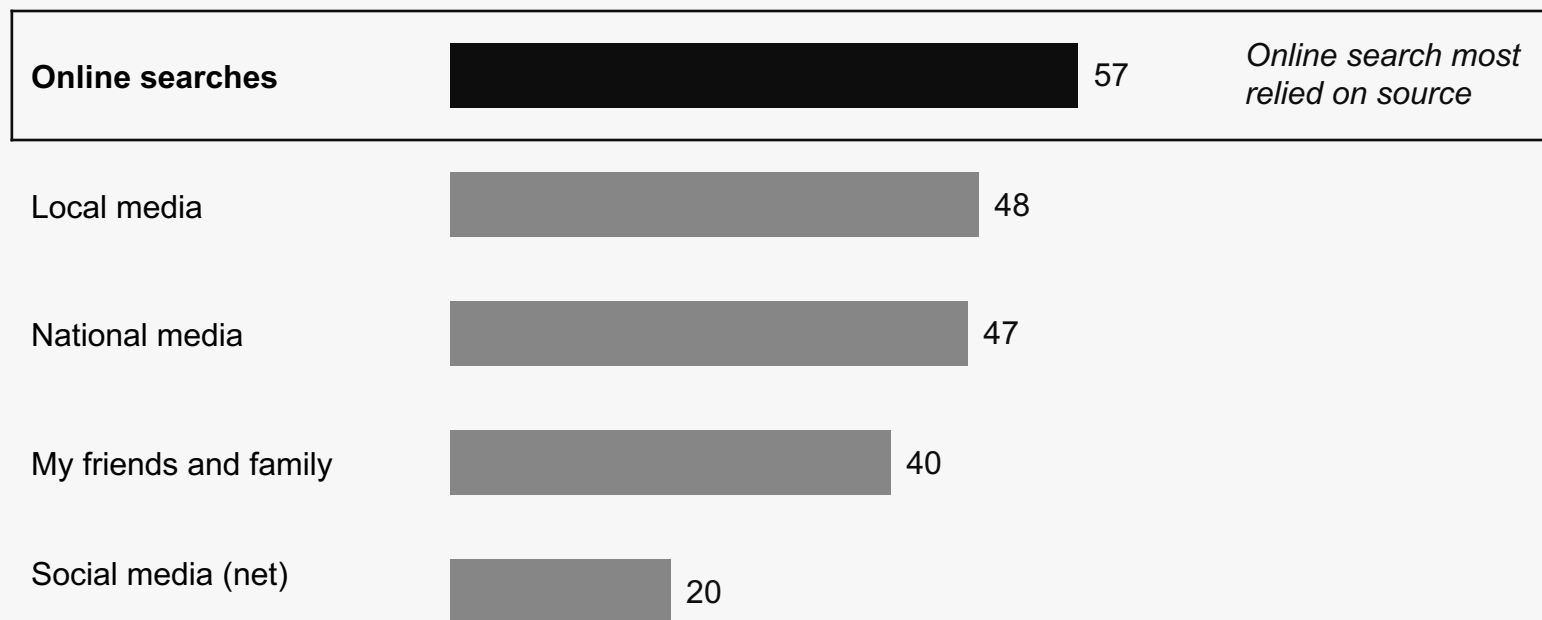


I'm Doing My Own Research: Help Me Find Information I Can Trust

Percent who say, in Germany

This is where I get most of my information about new technologies and innovations

Showing top 5 of 9 items



To Be Trusted With Innovation, Give Me a Voice

Percent who say this is **important** to earning or keeping their trust in each institution to be good managers of change, in Germany, showing the top 3 actions

Across institutions, listening is a top 3 trust-building action

| Business | % |
|--|-----------|
| Keep innovations affordable | 84 |
| Hear our concerns, let us ask questions | 82 |
| Communicate pluses and minuses | 81 |

| NGOs | % |
|--|-----------|
| Aid the vulnerable | 76 |
| Hear our concerns, let us ask questions | 71 |
| Help people keep up | 70 |

| Government | % |
|--|-----------|
| Hear our concerns, let us ask questions | 81 |
| Institute safeguards | 80 |
| Ensure our country isn't falling behind | 79 |

| Media | % |
|--|-----------|
| Hear our concerns, let us ask questions | 81 |
| Investigate innovations | 79 |
| Communicate pluses and minuses | 78 |



To Earn My Acceptance, Give Us Control Over the Impact of Innovations

Average acceptance rating
for each innovation

GLOBAL 28

Among those who believe
“people like me” have

○ little ● a lot of

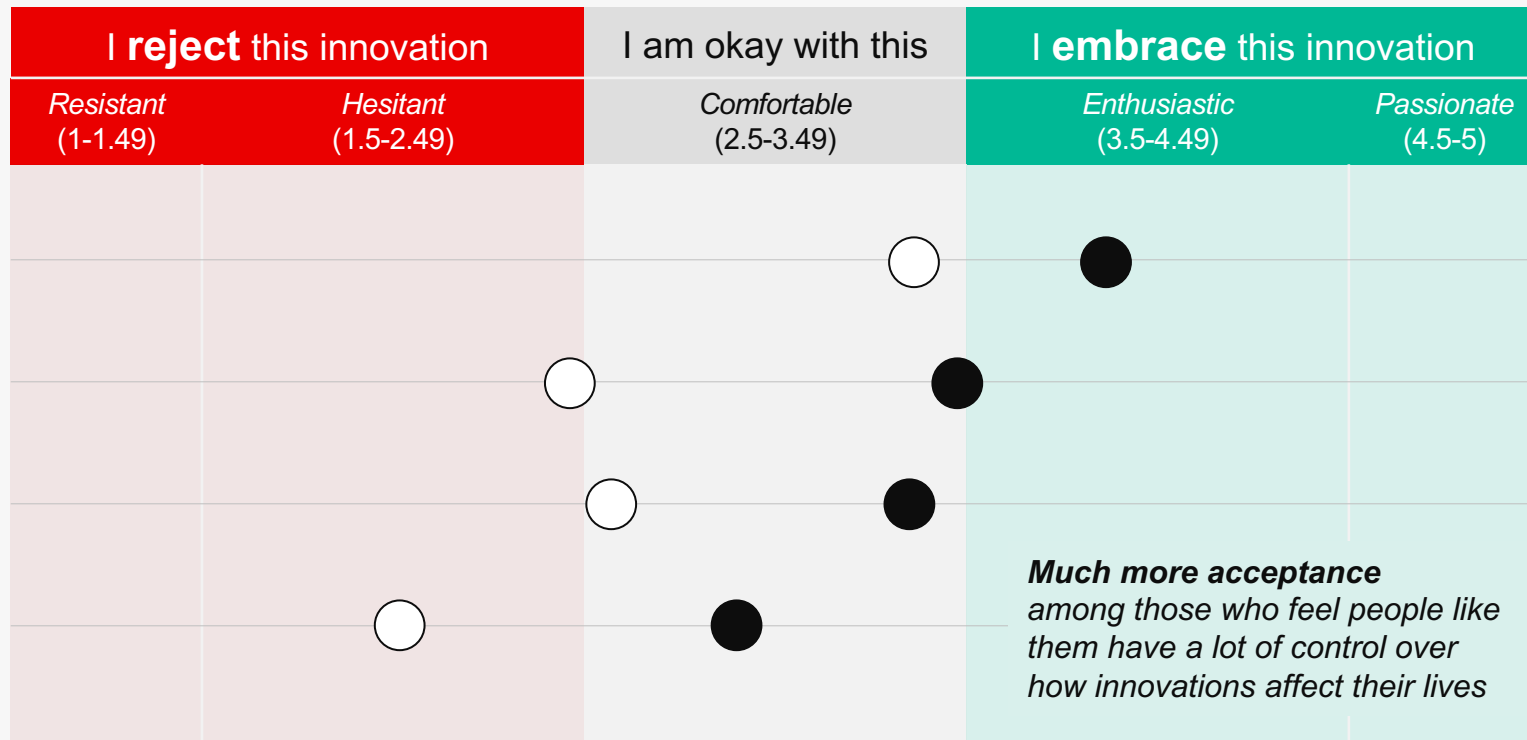
control over how
these innovations
affect their lives

Green energy

AI

Gene-based medicine

GMO foods



2024 Edelman Trust Barometer. TEC_INF. How much influence or control do you feel people like you have over how these technologies are used in ways that might affect their lives? 5-point scale; top 2 box, a lot of control; bottom 2 box, a little control. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of control. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



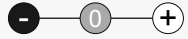
Restoring Trust in the Promise of Innovation



Over Past Decade, Demand for Business-Government Partnership on Innovation Surges

Percent who say

GLOBAL 22



2015 to 2024

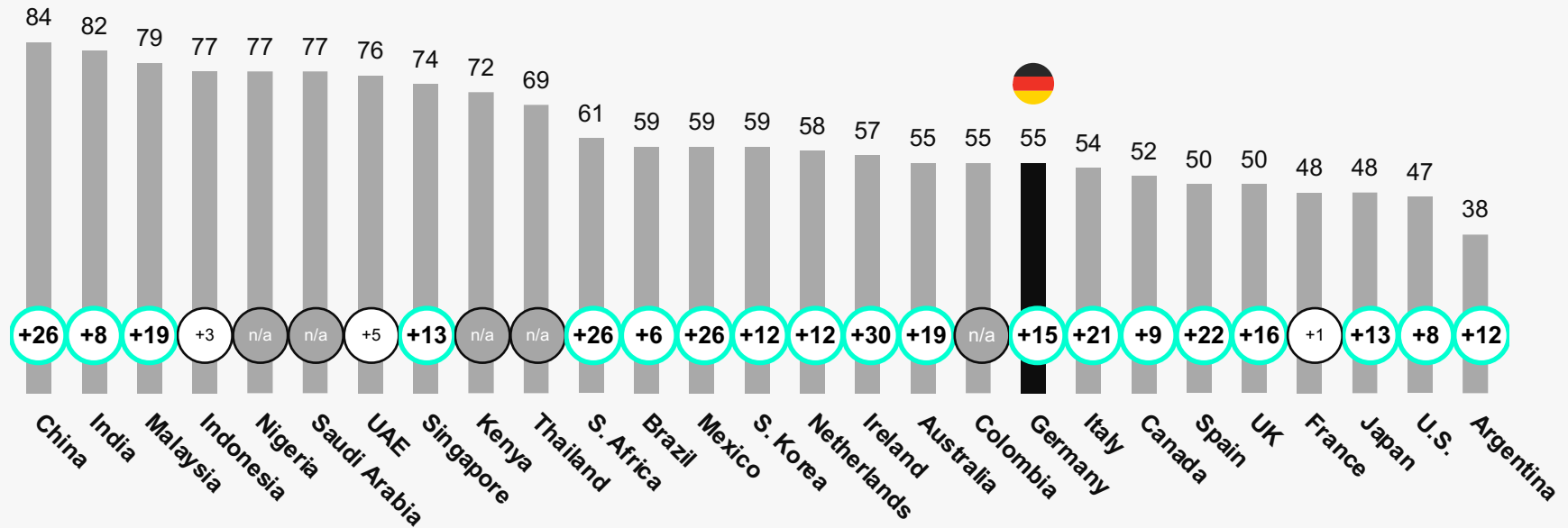
Significant change

If business partners with government, I would trust it more with technology-led changes

60%

+15 pts

Change, 2015 to 2024



2024 Edelman Trust Barometer. INS_PTN. Below are a number of actions that could impact your trust in business and industry to develop and implement technology-led changes. What impact would each of these actions have on your trust? 9-point scale, top 4 box, trust business and industry more. General population, 22-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Confidence in Effective Regulation Drives Adoption

Average acceptance rating

for each innovation

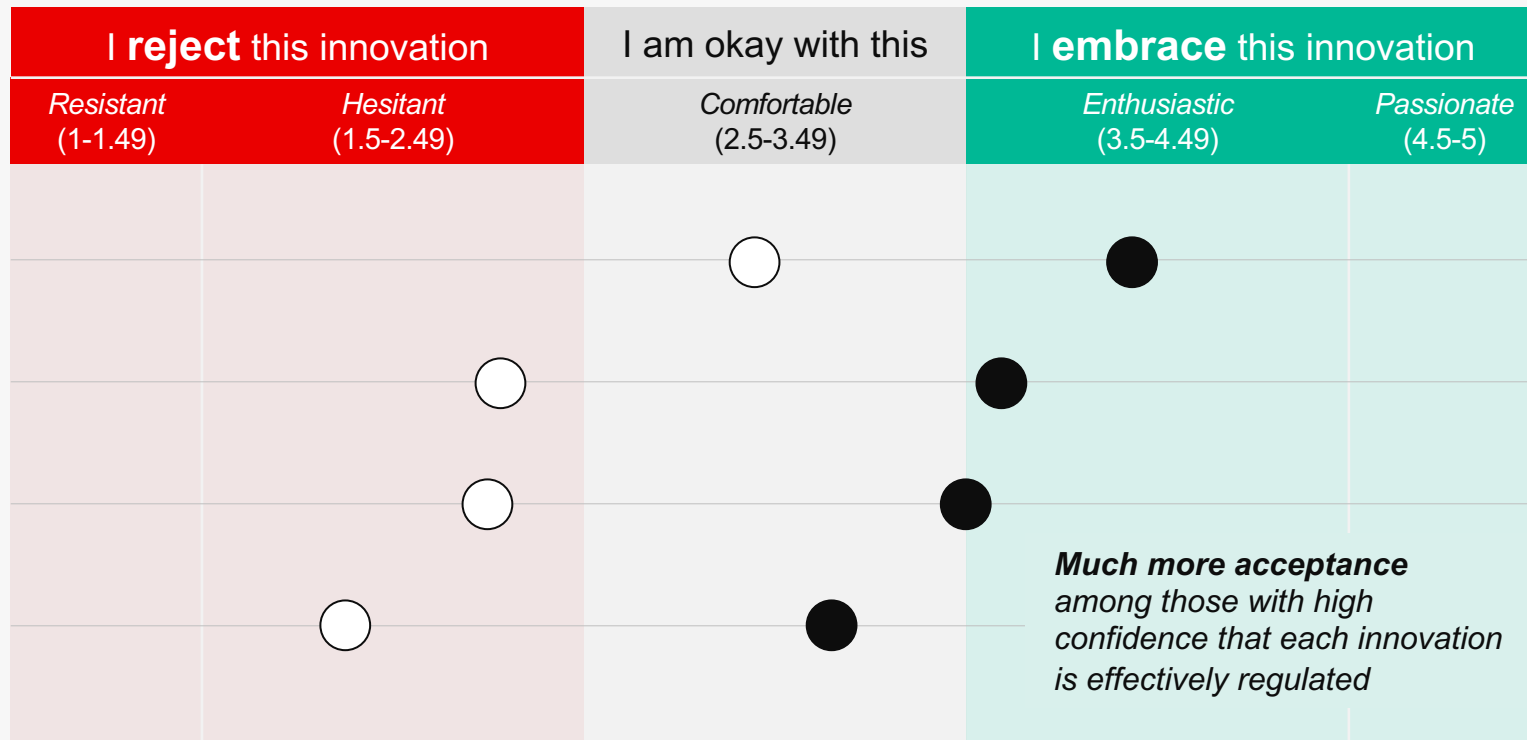
GLOBAL 28

Among those who have

○ low ● high

confidence that each innovation is **effectively regulated**

Green energy
AI
Gene-based medicine
GMO foods



2024 Edelman Trust Barometer. TEC_SAF. How confident are you that each of the following is being effectively regulated? 5-point scale; top 2 box, high confidence; bottom 2 box, low confidence. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of confidence. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



CEOs: Address Impacts of Innovation in Society

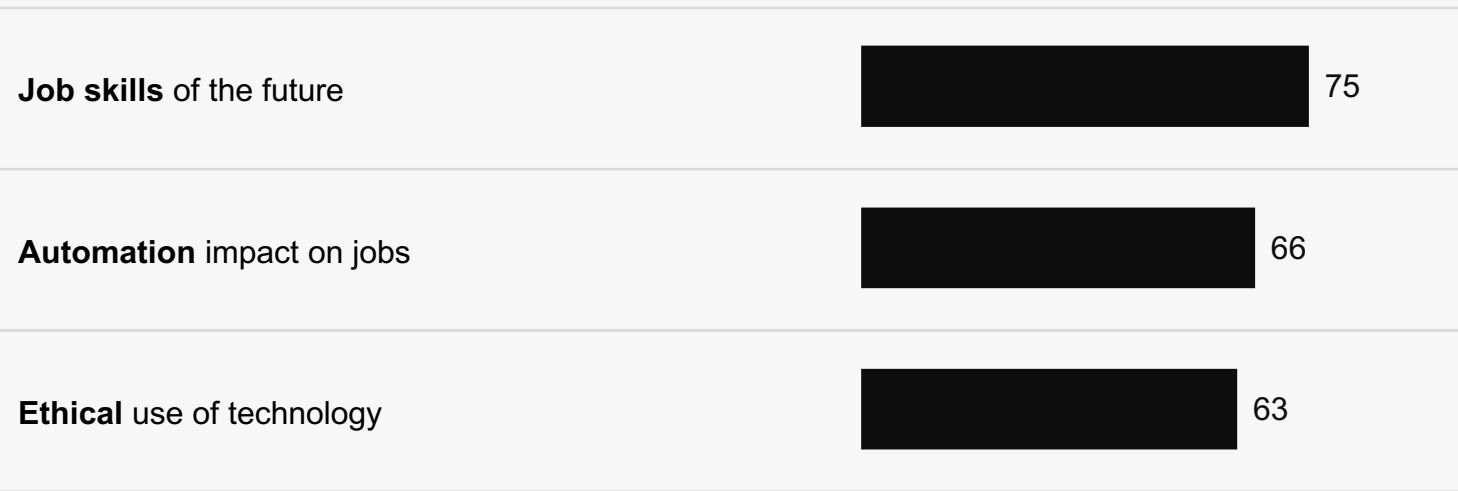
Percent who say, in Germany

I expect CEOs to **manage changes occurring in society**, not just those occurring in their business

59%

Among employees,

It is important to me that **my CEO speaks publicly** about issues such as:



Show Me How Innovation Will Bring Us a Better Future

Average acceptance rating

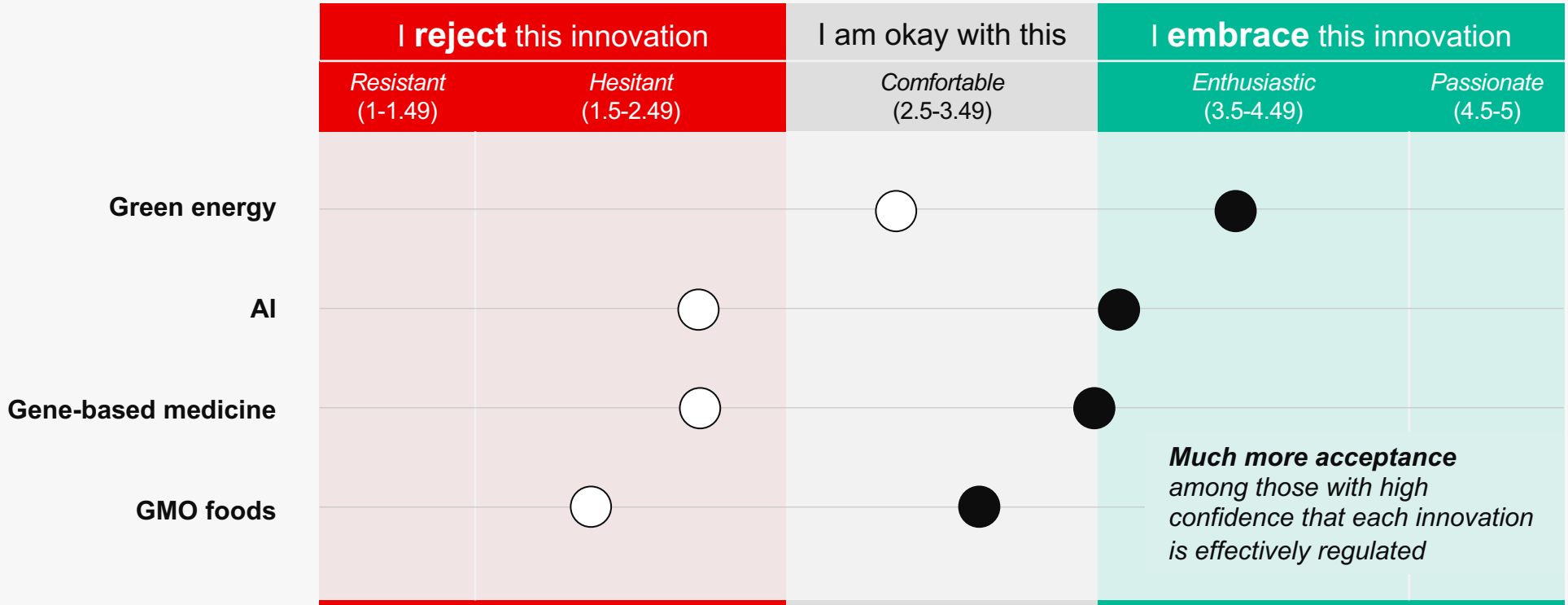
for each innovation

GLOBAL 28

Among those who have

○ low ● high

confidence that each innovation **will lead to a better future**



2024 Edelman Trust Barometer. TEC_FUT. How confident are you that these technologies will lead us to a better future? 5-point scale; top 2 box, high confidence; bottom 2 box, low confidence. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of confidence. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



Restoring Trust in the Promise of Innovation

1

Implementation as important as invention

Mismanaged innovations are as likely to ignite backlash as advance society. With breakthroughs like AI, vaccines, and green energy on the line, explaining the science and managing impacts is essential.

2

Business must partner for change

Business is most trusted to introduce innovation into society, with an emphasis on partnering with government. CEOs need to safeguard jobs and take a stand on emerging ethical concerns.

3

Science must integrate with society

Scientists are still trusted—but increasingly subject to public scrutiny. To build trust in expert recommendations, explain the research, engage in dialogue, and harness peer voices as advocates.

4

Give me control over my future

When people feel in control over how innovations affect their lives, they are more likely to embrace them, not resist them. Listen for concerns, be open to questions.



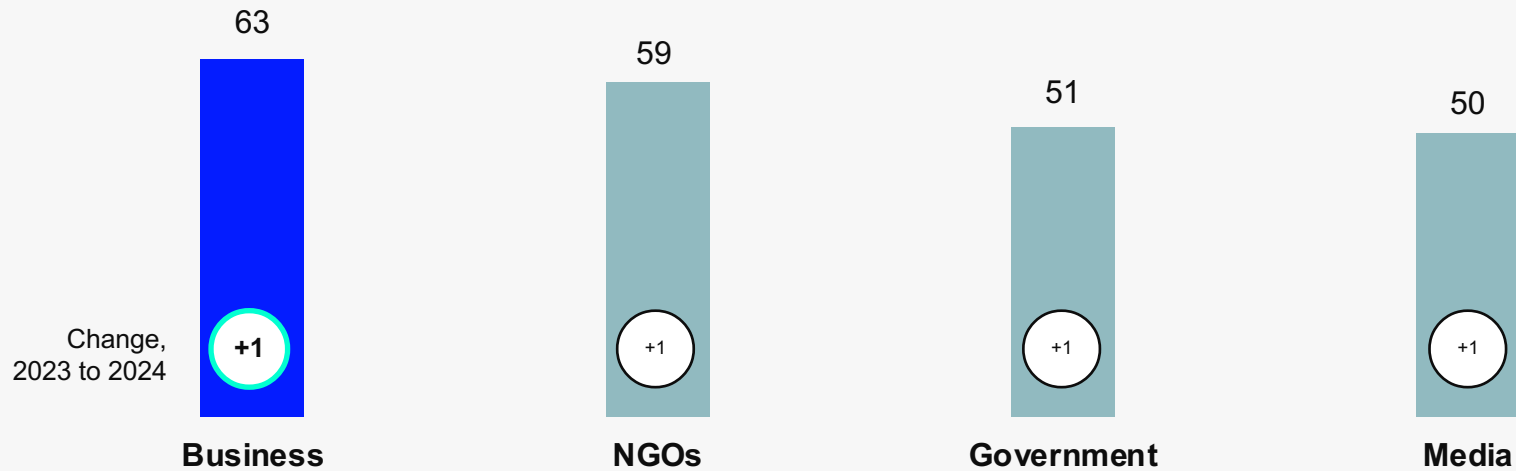
Supplemental Data



Business Remains Only Trusted Institution

Percent trust

GLOBAL 28 ■ Distrust (1-49) ■ Neutral (50-59) ■ Trust (60-100) ● - ● 0 ● + ○ Significant change



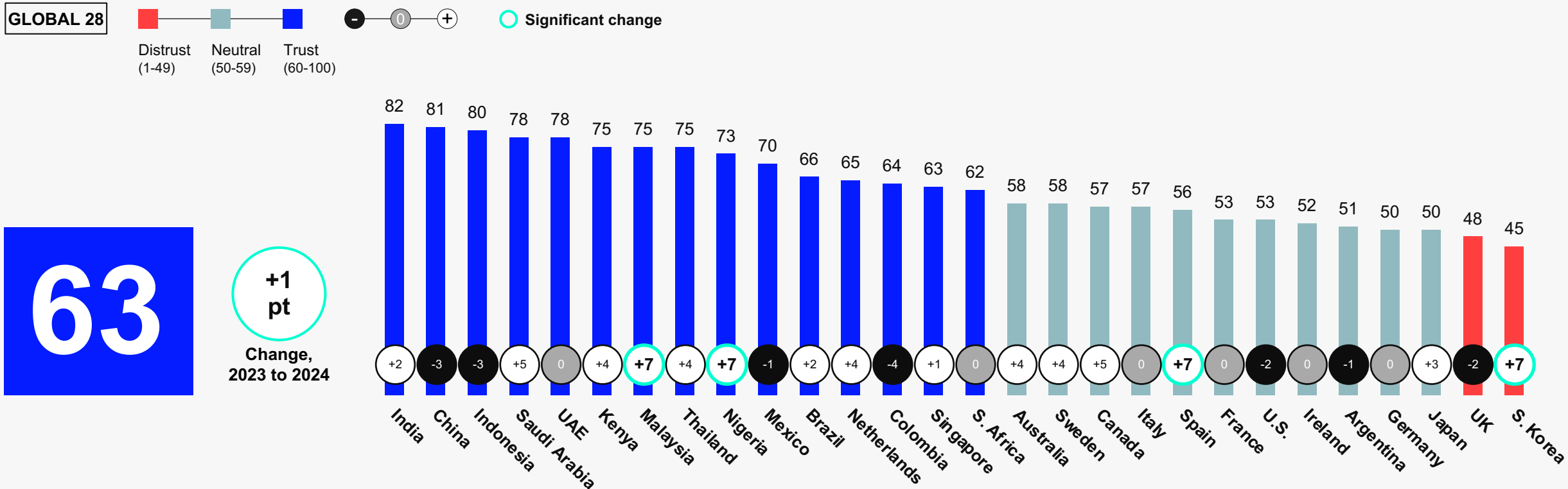
2024 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Due to a translation inconsistency in France, the 2023 Trust Index has been imputed using a model. For more details, please see the Technical Appendix.

Business Trusted in 15 of 28 Countries

Percent trust in business



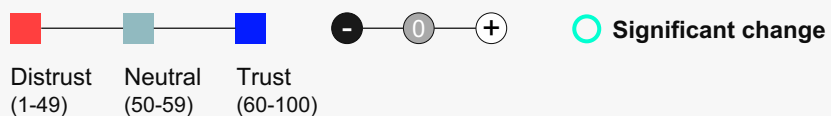
2024 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



NGOs Trusted in 12 of 28 Countries

Percent trust in NGOs

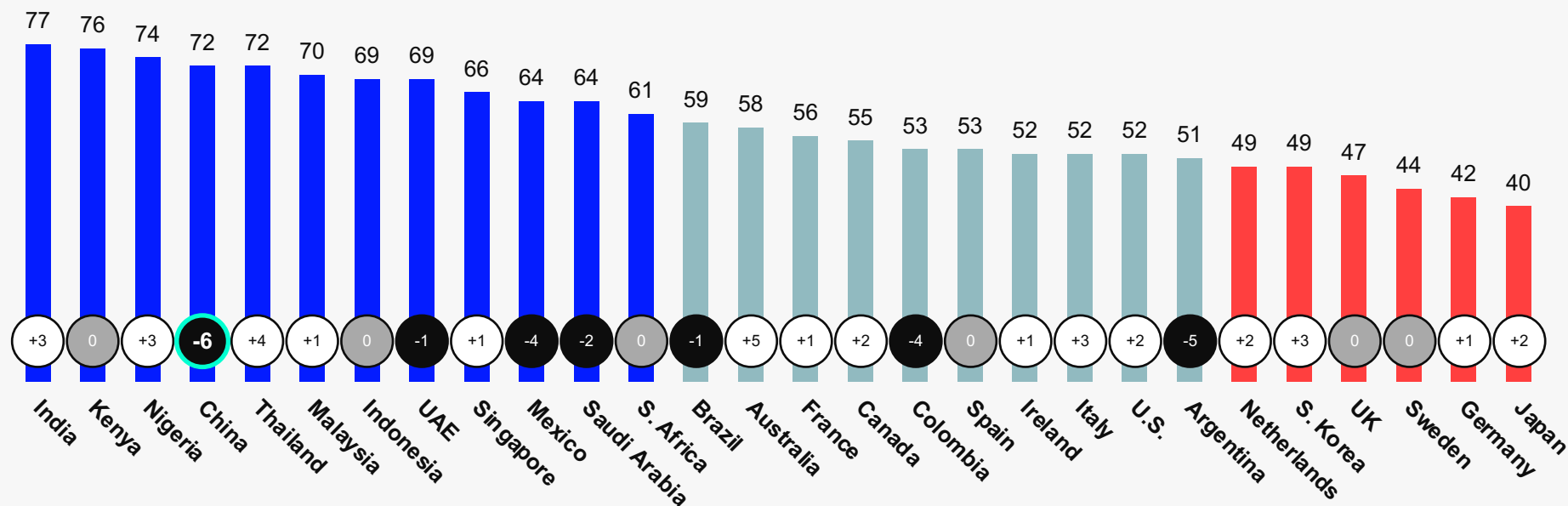
GLOBAL 28



59

+1 pt

Change, 2023 to 2024



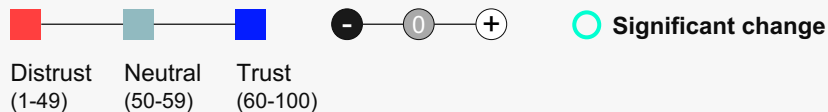
2024 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Government Distrusted in 17 of 28 Countries

Percent trust in government

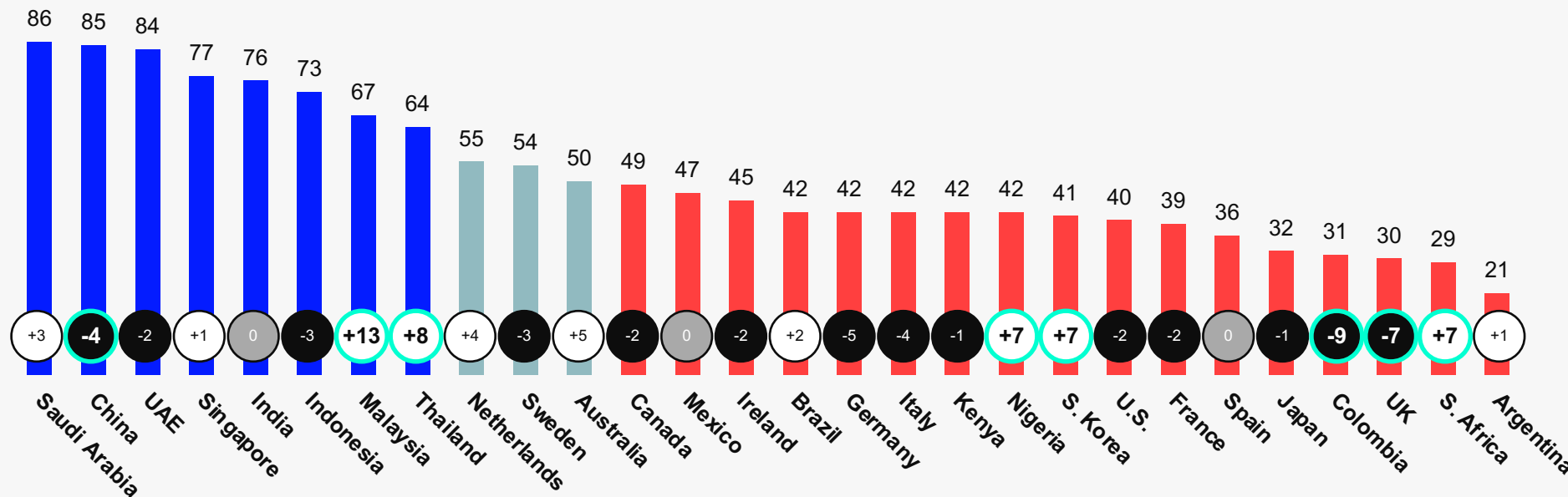
GLOBAL 28



51

+1 pt

Change, 2023 to 2024



2024 Edelman Trust Barometer. 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, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

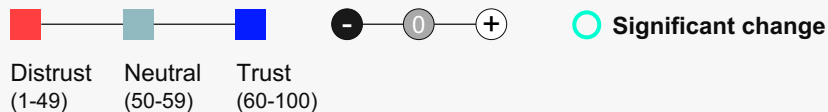
Due to a translation inconsistency in France, the 2023 government in general data has been imputed using a model. For more details, please see the Technical Appendix.



Media Distrusted in 15 of 28 Countries

Percent trust in media

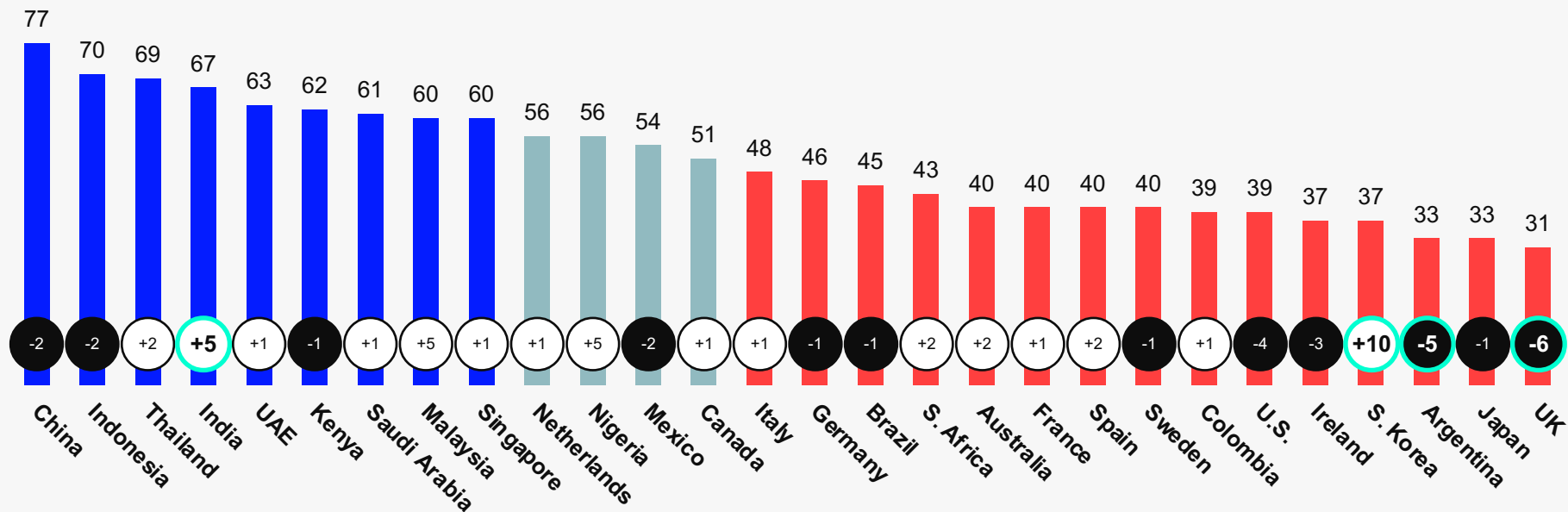
GLOBAL 28



50

+1 pt

Change, 2023 to 2024



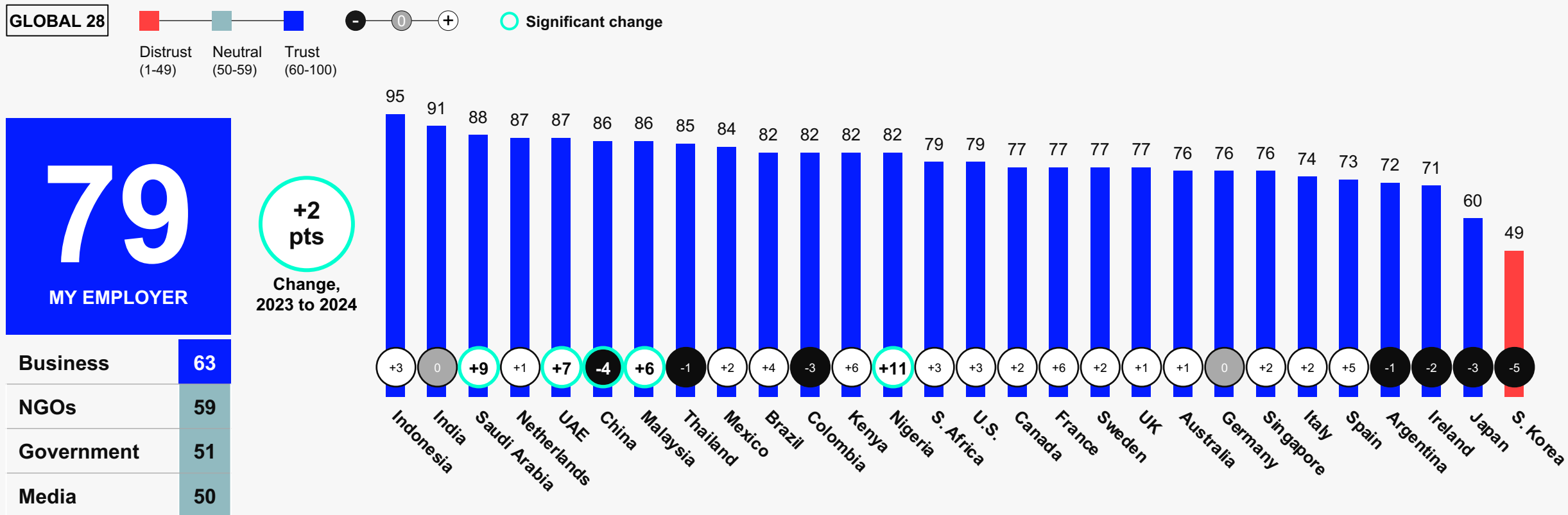
2024 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

For S. Korea, the language used in 2023 for "media" translated to "press." In 2024 it was adjusted to translate as "media."



My Employer Trusted in 27 of 28 Countries

Percent trust



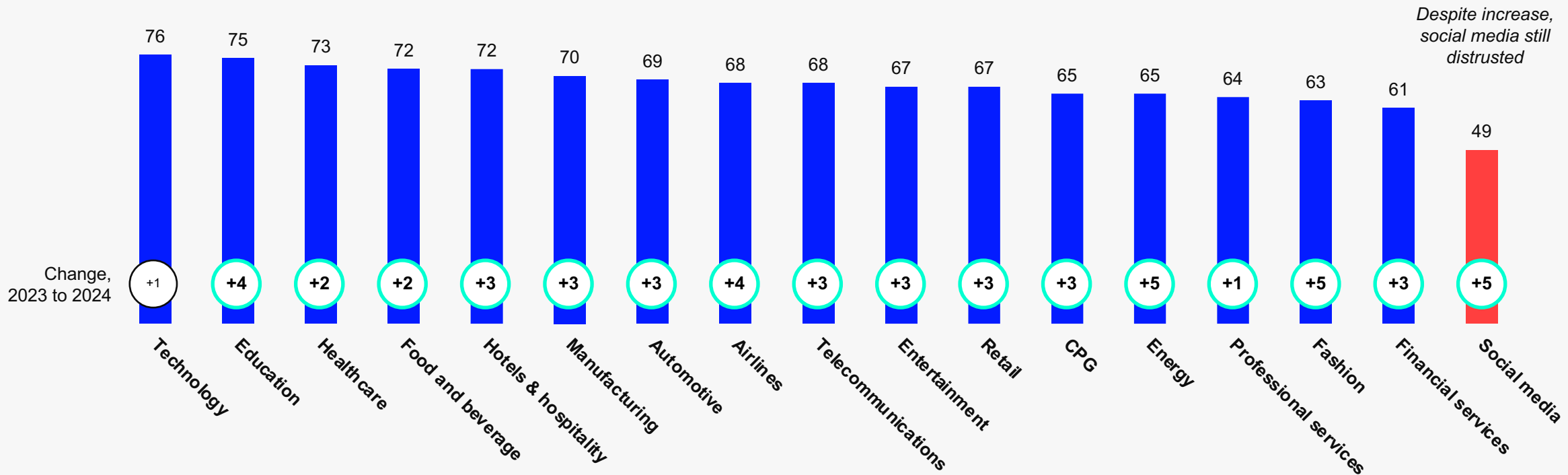
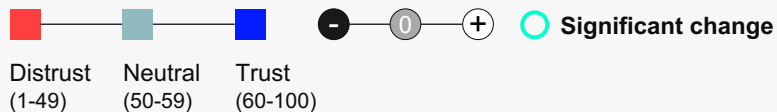
2024 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 28-mkt avg. "Your employer" only shown to those who are an employee of an organization (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Significant Trust Increases Across Most Industry Sectors

Percent trust in businesses in the following industries to do what is right

GLOBAL 25 Excludes Mexico, S. Africa, U.S.



2024 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 25-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

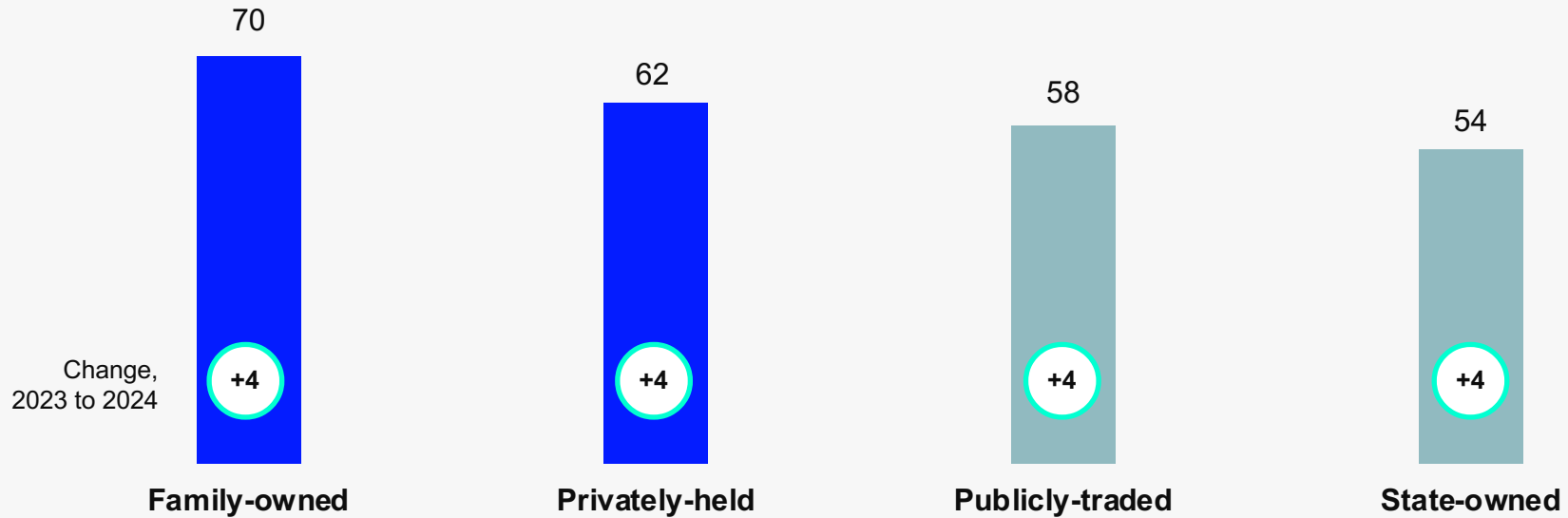
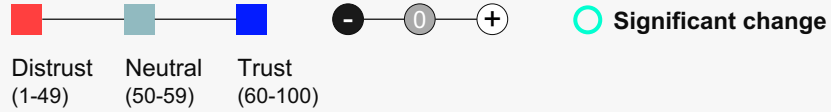
In S. Africa, the Afrikaans translation for "Food and beverage" was updated in 2024. In Mexico and the U.S., the Spanish translation for "Automotive" was updated in 2024. These language changes mean the 2024 data cannot be compared to data from previous years and have been removed from this analysis for all sectors to ensure a consistent global average is shown for each.



Family-Owned Businesses Most Trusted

Percent trust in each type of business to do what is right

GLOBAL 28

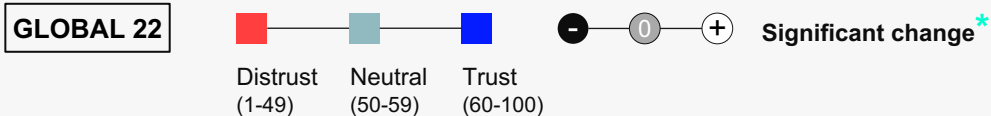


2024 Edelman Trust Barometer. TRU_ORG. Thinking about different types of businesses, please indicate how much you trust each type of business to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Family-Owned Business Most Trusted Type of Business

Percent trust in each type of business to do what is right



| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 10yr change |
|-----------------|------|------|------|------|------|------|------|------|------|------|------|-------------|
| Family-owned | 70 | 66 | 68 | 70 | - | 70 | 69 | 63 | 67 | 66 | 68 | -2 |
| Privately-held | 57 | 53 | 56 | 58 | - | 60 | 59 | 55 | 57 | 56 | 60 | +3* |
| Publicly-traded | 55 | 49 | 52 | 56 | - | 58 | 58 | 53 | 55 | 53 | 56 | +1* |
| State-owned | 49 | 44 | 47 | 53 | - | 56 | 52 | 50 | 51 | 49 | 53 | +4* |

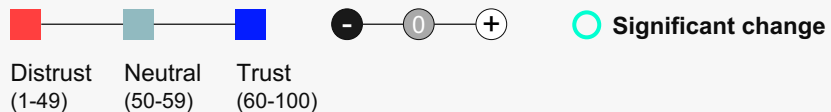
2024 Edelman Trust Barometer. TRU_ORG. Thinking about different types of businesses, please indicate how much you trust each type of business to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 22-mkt avg. Ten-year changes were tested for significance using a t-test set at the 99%+ confidence level.



European Union Distrusted in 12 of 28 Countries

Percent trust in the European Union

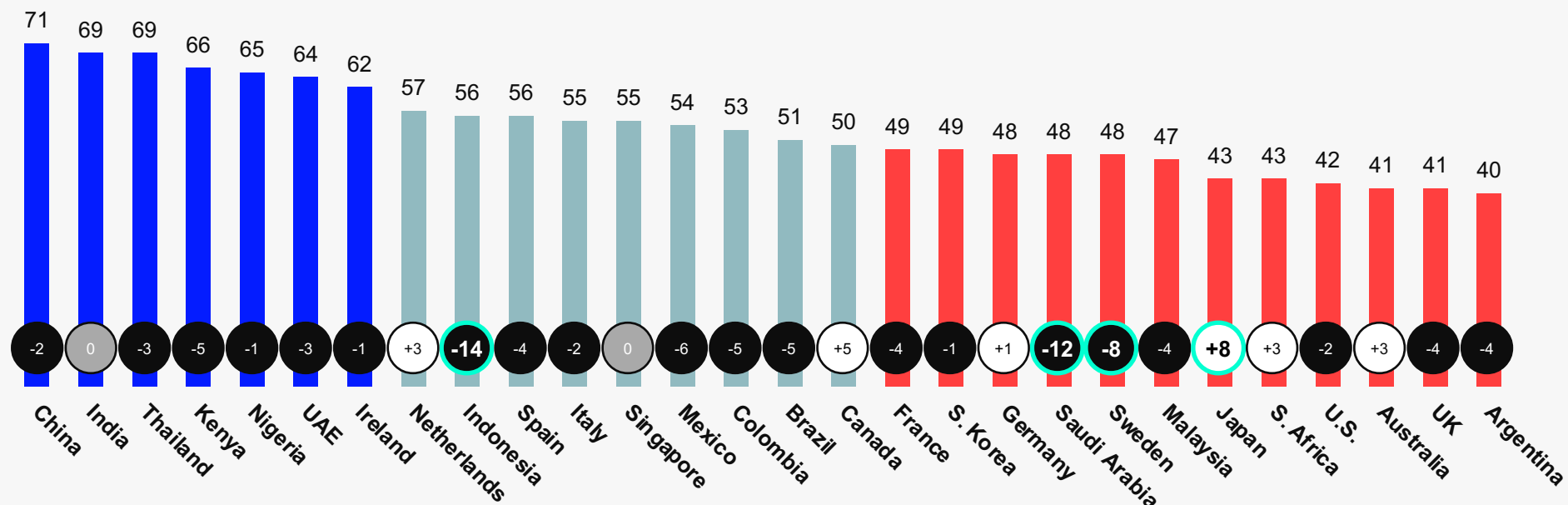
GLOBAL 28



53

-3 pts

Change, 2023 to 2024



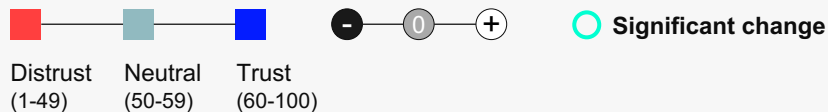
2024 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Attribute asked of half the sample. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



United Nations Trusted in 11 of 28 Countries

Percent trust in the United Nations

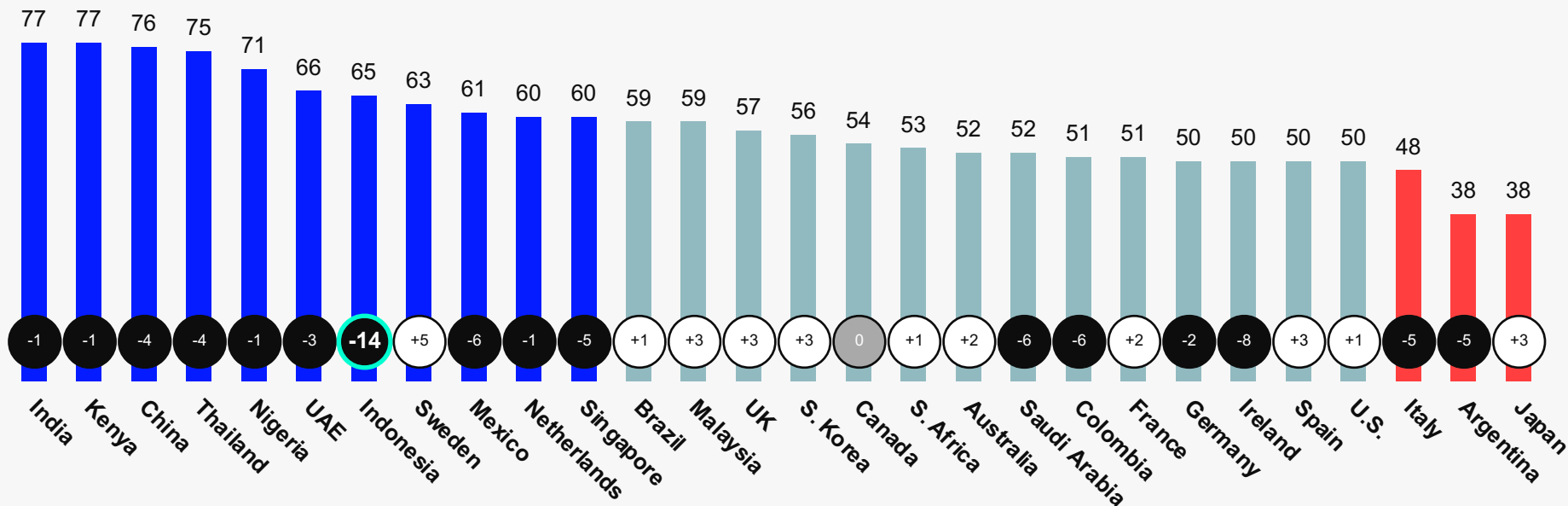
GLOBAL 28



58

-1
pts

Change,
2023 to 2024



2024 Edelman Trust Barometer. 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. Attribute asked of half the sample. General population, 28-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

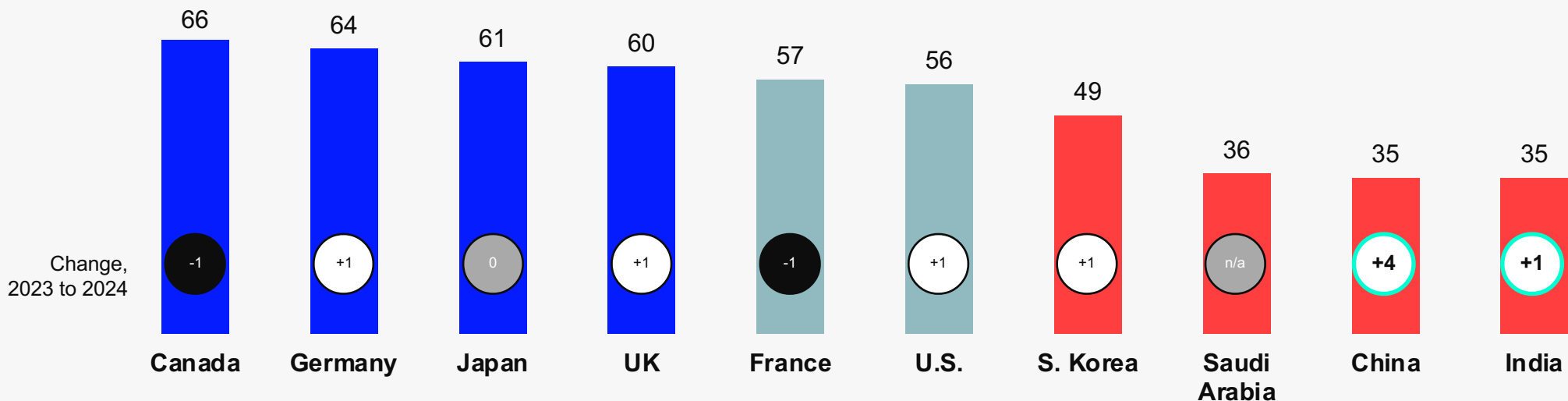
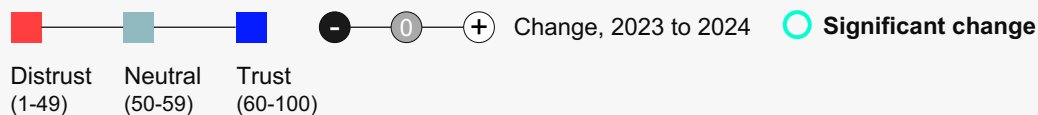
In India, the Hindi translation for "The United Nations" was updated in 2024 to the formal reference.



Trust in Companies Headquartered in Foreign Countries

Percent trust in companies headquartered in each country, among respondents from outside each country being rated

GLOBAL 27 Excludes home countries



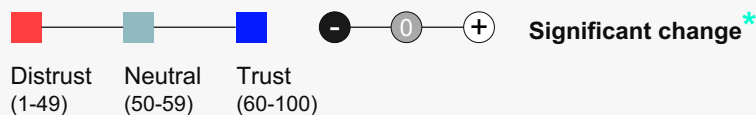
2024 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 27-mkt avg. Data excludes respondents from the country being rated. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



10-Year Trend : Trust in Companies Headquartered in Foreign Countries

Percent trust in companies headquartered in each country, among respondents from outside each country being rated

GLOBAL 21 Excludes home countries



| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 10yr change |
|--------------|------|------|------|------|------|------|------|------|------|------|------|-------------|
| Canada | 69 | 64 | 67 | 69 | 70 | 70 | 69 | 66 | 65 | 65 | 64 | -5* |
| Germany | 71 | 65 | 65 | 66 | 65 | 70 | 69 | 65 | 64 | 61 | 62 | -9* |
| Japan | 64 | 59 | 60 | 61 | 61 | 68 | 66 | 59 | 57 | 58 | 59 | -5* |
| UK | 68 | 62 | 64 | 63 | 60 | 66 | 63 | 57 | 57 | 56 | 57 | -11* |
| France | 60 | 54 | 56 | 58 | 58 | 62 | 58 | 56 | 56 | 56 | 55 | -5* |
| U.S. | 62 | 58 | 58 | 57 | 51 | 55 | 52 | 49 | 52 | 51 | 53 | -9* |
| S. Korea | 44 | 40 | 43 | 45 | 43 | 48 | 45 | 47 | 44 | 46 | 47 | +3* |
| Saudi Arabia | - | - | - | - | - | - | - | - | - | - | 35 | n/a |
| India | 30 | 27 | 30 | 31 | 31 | 37 | 35 | 33 | 31 | 31 | 32 | +2* |
| China | 33 | 31 | 32 | 33 | 34 | 36 | 34 | 31 | 27 | 26 | 30 | -3* |

2024 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 21-mkt avg. Data excludes respondents from the country being rated. Ten-year changes were tested for significance using a t-test set at the 99%+ confidence level.

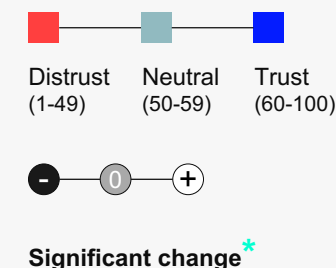


10-Year Trend: Trust in Companies Headquartered in Germany

Percent trust in companies headquartered in Germany

| Among those in... | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 10yr change |
|---------------------------|------|------|------|------|------|------|------|------|------|------|------|-------------|
| Global 21 (excl. Germany) | 71 | 65 | 65 | 66 | 65 | 70 | 69 | 65 | 64 | 61 | 62 | -9* |
| Argentina | 81 | 70 | 67 | 66 | 64 | 75 | 79 | 77 | 71 | 64 | 61 | -20* |
| Australia | 60 | 53 | 55 | 54 | 53 | 59 | 55 | 63 | 56 | 50 | 57 | -3 |
| Brazil | 73 | 74 | 77 | 76 | 72 | 77 | 77 | 68 | 68 | 65 | 64 | -9* |
| Canada | 63 | 58 | 59 | 57 | 60 | 62 | 56 | 56 | 53 | 52 | 56 | -7* |
| China | 85 | 76 | 87 | 80 | 81 | 89 | 84 | 69 | 71 | 71 | 72 | -13* |
| Colombia | - | - | 74 | 79 | 75 | 82 | 81 | 74 | 68 | 70 | 64 | n/a |
| France | 74 | 63 | 57 | 61 | 62 | 61 | 59 | 58 | 60 | 53 | 60 | -14* |
| India | 73 | 73 | 75 | 83 | 78 | 82 | 89 | 85 | 78 | 78 | 76 | +3 |
| Indonesia | 80 | 78 | 71 | 83 | 76 | 82 | 78 | 76 | 82 | 79 | 71 | -9* |
| Ireland | 61 | 48 | 52 | 55 | 53 | 63 | 63 | 63 | 64 | 62 | 56 | -5 |
| Italy | 75 | 67 | 62 | 65 | 62 | 66 | 61 | 52 | 61 | 53 | 57 | -18* |
| Japan | 63 | 55 | 47 | 58 | 55 | 54 | 54 | 44 | 52 | 46 | 50 | -13* |
| Kenya | - | - | - | - | - | - | 75 | 77 | 74 | 75 | 76 | n/a |

| Among those in... | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 10yr change |
|-------------------|------|------|------|------|------|------|------|------|------|------|------|-------------|
| Malaysia | 71 | 68 | 70 | 62 | 56 | 75 | 72 | 65 | 68 | 61 | 66 | -5 |
| Mexico | 80 | 75 | 78 | 78 | 80 | 83 | 83 | 80 | 73 | 69 | 69 | -11* |
| Netherlands | 72 | 69 | 62 | 71 | 71 | 69 | 72 | 73 | 72 | 70 | 72 | 0 |
| Nigeria | - | - | - | - | - | - | - | - | 75 | 65 | 75 | n/a |
| Saudi Arabia | - | - | - | - | - | 79 | 78 | 67 | 76 | 69 | 63 | n/a |
| Singapore | 71 | 68 | 68 | 69 | 65 | 72 | 66 | 66 | 65 | 62 | 60 | -11* |
| S. Africa | 71 | 69 | 67 | 64 | 61 | 74 | 69 | 65 | 57 | 58 | 61 | -10* |
| S. Korea | 74 | 71 | 69 | 66 | 68 | 65 | 73 | 61 | 60 | 57 | 59 | -15* |
| Spain | 66 | 57 | 60 | 63 | 66 | 68 | 69 | 60 | 64 | 61 | 63 | -3 |
| Sweden | 61 | 58 | 55 | 58 | 57 | - | - | - | - | 64 | 64 | +3 |
| Thailand | - | - | - | - | - | - | 81 | 71 | 79 | 71 | 71 | n/a |
| UAE | 78 | 75 | 81 | 74 | 77 | 86 | 82 | 75 | 80 | 77 | 73 | -5 |
| UK | 61 | 53 | 48 | 51 | 49 | 58 | 53 | 57 | 47 | 52 | 54 | -7 |
| U.S. | 55 | 47 | 49 | 53 | 51 | 58 | 52 | 54 | 46 | 51 | 46 | -9* |



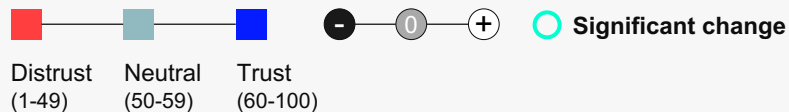
2024 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 21-mkt avg. Data excludes respondents from the country being rated. Ten-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Trust in People

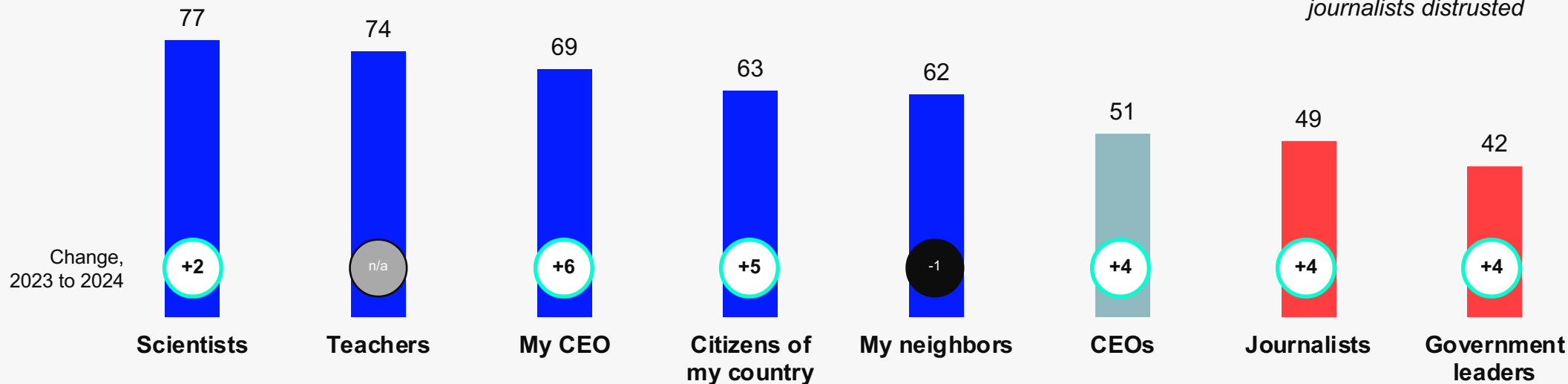
Percent trust to do what is right

GLOBAL 25 excl China, Singapore, Sweden



Greatest trust increase for employer CEOs

Government leaders and journalists distrusted



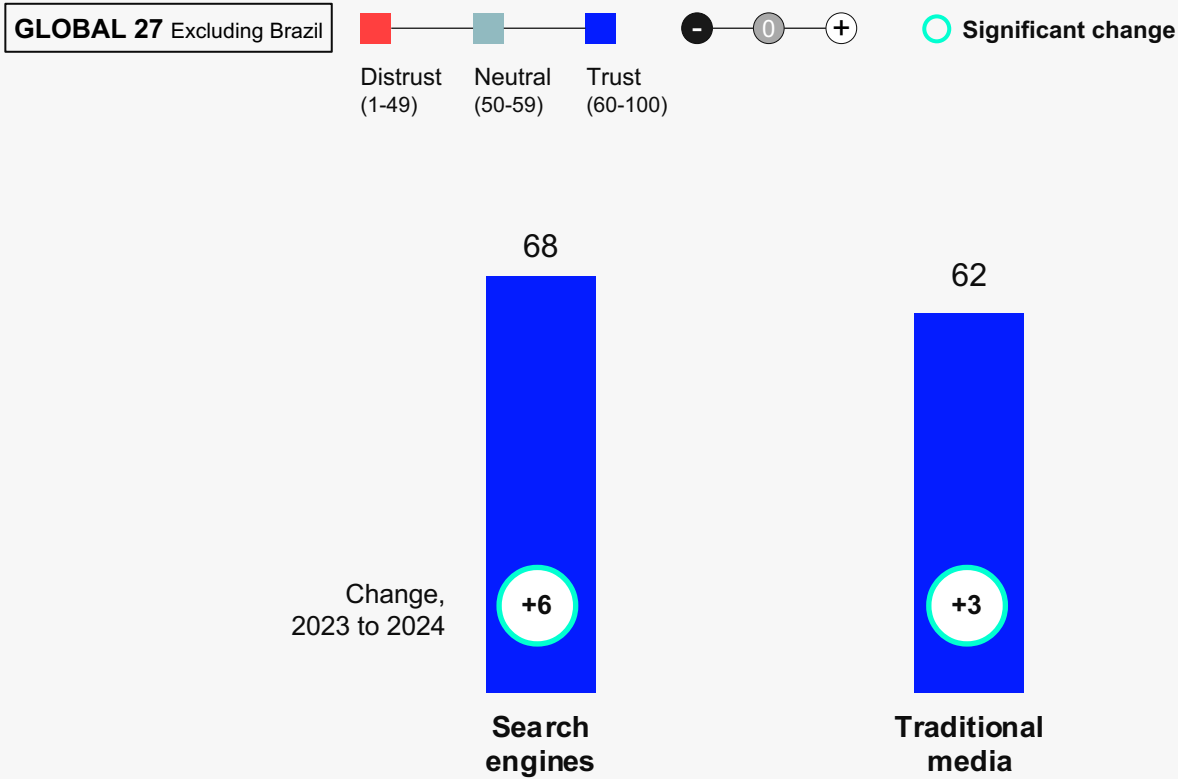
2024 Edelman Trust Barometer. TRU_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. Attributes asked of half the sample. General population, 25-mkt avg. "My CEO" only shown to those who are an employee of an organization (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

In Sweden, the Swedish translation for "Government leaders" was updated in 2024. In China and Singapore, the Chinese translation for "Journalists" was updated in 2024. These language changes mean the 2024 data cannot be compared to data from previous years and have been removed from this analysis for all items to ensure a consistent global average is shown for each.



Trust in Media Sources

Percent trust in each media source for general news and information



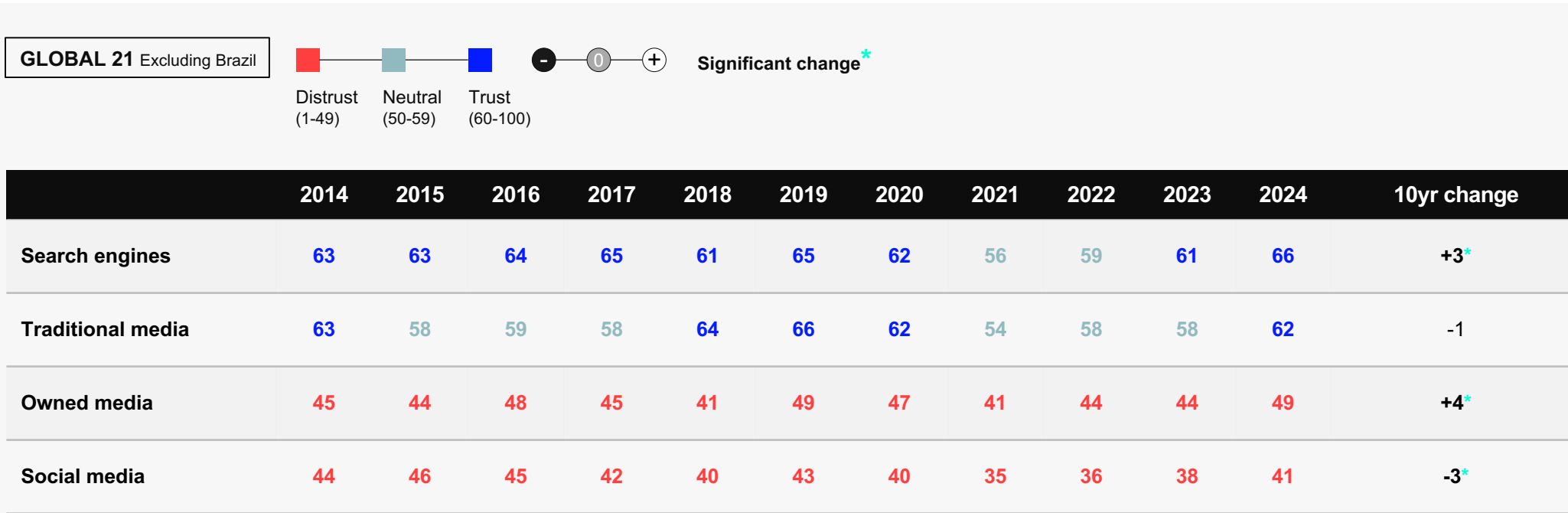
2024 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 27-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

In Brazil, the translation for "Search engines" was updated in 2024. This language change mean the 2024 data cannot compared to data from previous years and has been removed from this analysis for all items to ensure a consistent global average is shown for each.



10-Year Trend: Trust in Media Sources

Percent trust in each media source for general news and information



2024 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 the sample. General population, 21-mkt avg. Ten-year changes were tested for significance using a t-test set at the 99%+ confidence level.

In Brazil, the translation for "Search engines" was updated in 2024. This language change mean the 2024 data cannot compared to data from previous years and has been removed from this analysis for all items to ensure a consistent global average is shown for each.



Fear of Innovation Becomes Political, by Innovation

Percent who reject each innovation

| | | Global 21 | Argentina | Australia | Brazil | Canada | Colombia | France | Germany | India | Ireland | Italy | Kenya | Malaysia | Mexico | Netherlands | Nigeria | S. Africa | S. Korea | Spain | Sweden | UK | U.S. |
|-------------------------|----------------------------------|-----------|-----------|-----------|--------|--------|----------|--------|---------|-------|---------|-------|-------|----------|--------|-------------|---------|-----------|----------|-------|--------|----|------|
| Among those who lean... | | | | | | | | | | | | | | | | | | | | | | | |
| Green energy | Right | 18 | 10 | 28 | 12 | 25 | 11 | 21 | 37 | 15 | 14 | 15 | 10 | 9 | 10 | 20 | 14 | 15 | 13 | 18 | 20 | 20 | 40 |
| | Left | 10 | 7 | 7 | 9 | 6 | 11 | 13 | 10 | 17 | 12 | 9 | 6 | 17 | 14 | 10 | 19 | 15 | 10 | 8 | 8 | 6 | 6 |
| | <i>Difference, right vs left</i> | 8 | 3 | 21 | 3 | 19 | 0 | 8 | 27 | -2 | 2 | 6 | 4 | -8 | -4 | 10 | -5 | 0 | 3 | 10 | 12 | 14 | 34 |
| AI | Right | 38 | 23 | 52 | 31 | 53 | 29 | 56 | 48 | 19 | 59 | 45 | 20 | 26 | 30 | 53 | 17 | 32 | 21 | 44 | 41 | 54 | 59 |
| | Left | 42 | 40 | 52 | 30 | 53 | 32 | 58 | 51 | 22 | 53 | 39 | 22 | 25 | 29 | 57 | 25 | 31 | 22 | 43 | 46 | 57 | 51 |
| | <i>Difference, right vs left</i> | -4 | -17 | 0 | 1 | 0 | -3 | -2 | -3 | -3 | 6 | 6 | -2 | 1 | 1 | -4 | -8 | 1 | -1 | 1 | -5 | -3 | 8 |
| Gene-based medicine | Right | 37 | 28 | 37 | 39 | 41 | 38 | 42 | 48 | 20 | 37 | 40 | 38 | 41 | 30 | 49 | 30 | 44 | 29 | 34 | 31 | 36 | 53 |
| | Left | 30 | 31 | 22 | 20 | 22 | 32 | 39 | 36 | 21 | 33 | 21 | 43 | 47 | 31 | 39 | 33 | 46 | 24 | 26 | 31 | 29 | 23 |
| | <i>Difference, right vs left</i> | 7 | -3 | 15 | 19 | 19 | 6 | 3 | 12 | -1 | 4 | 19 | -5 | -6 | -1 | 10 | -3 | -2 | 5 | 8 | 0 | 7 | 30 |
| GMO foods | Right | 60 | 60 | 55 | 59 | 60 | 61 | 76 | 68 | 45 | 64 | 70 | 57 | 52 | 57 | 63 | 50 | 58 | 59 | 67 | 59 | 61 | 60 |
| | Left | 61 | 65 | 48 | 57 | 55 | 67 | 81 | 63 | 38 | 59 | 64 | 70 | 67 | 64 | 66 | 49 | 69 | 60 | 64 | 62 | 59 | 48 |
| | <i>Difference, right vs left</i> | -1 | -5 | 7 | 2 | 5 | -6 | -5 | 5 | 7 | 5 | 6 | -13 | -15 | -7 | -3 | 1 | -11 | -1 | 3 | -3 | 2 | 12 |

2024 Edelman Trust Barometer. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; bottom 2 box, resistant or hesitant = reject. General population, 21-mkt avg., by political leaning. Political leaning is not asked in China, Saudi Arabia, Thailand or the UAE. Indonesia, Japan, and Singapore are excluded from the analysis due to having sample sizes too low to report (less than n100).



To Earn My Acceptance, Show Me the Innovation Is Vetted by Scientists and Ethicists

Average acceptance rating

for each innovation

GLOBAL 28

Among those who have

○ low ● high

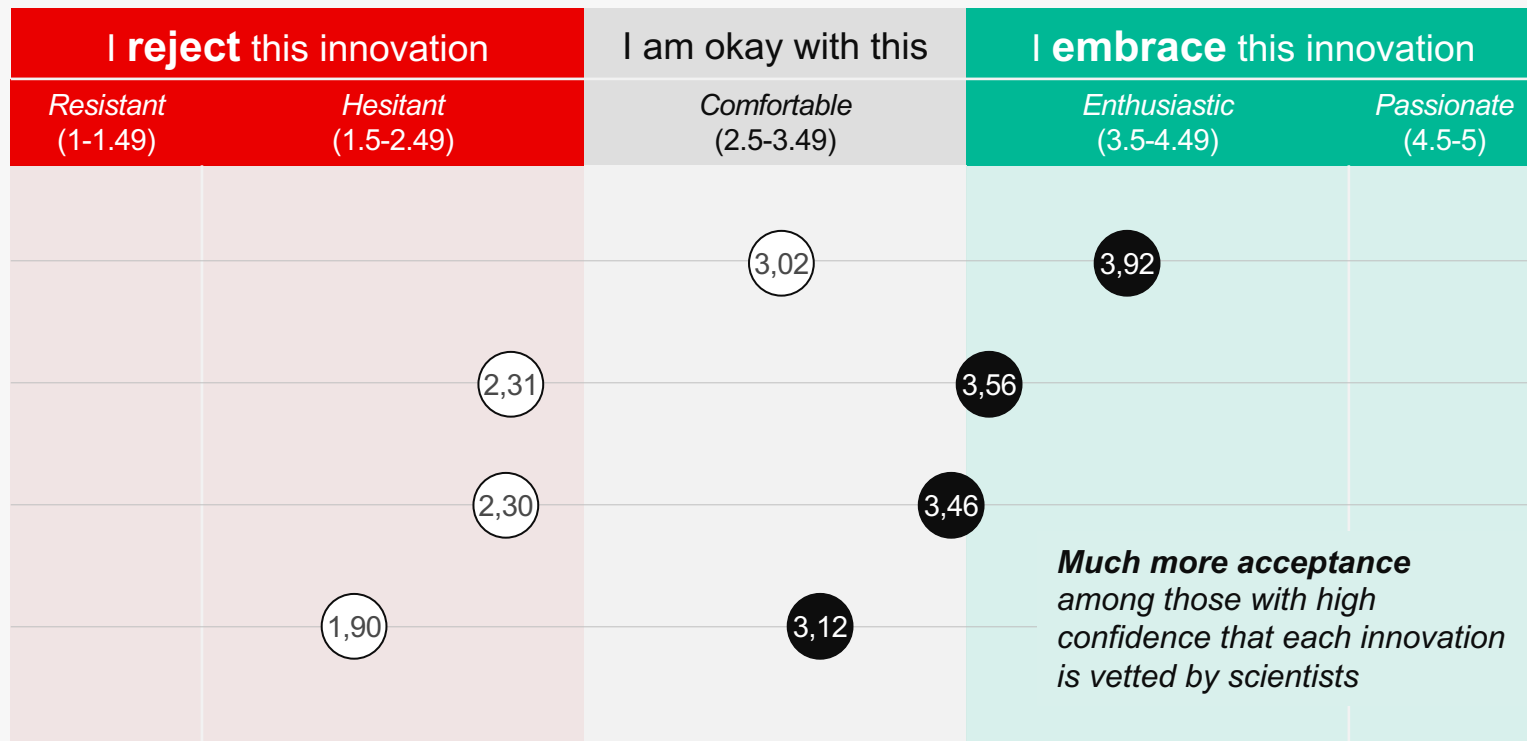
confidence that each innovation has been **evaluated by scientists and ethicists**

Green energy

AI

Gene-based medicine

GMO foods



2024 Edelman Trust Barometer. TEC_TST. How confident are you that these technologies have been adequately tested, evaluated, and assessed by scientists, ethicists, and other experts? 5-point scale; top 2 box, high confidence; bottom 2 box, low confidence. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of confidence. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



To Earn My Acceptance, Give Us Control Over the Impact of Innovations

Average acceptance rating
for each innovation

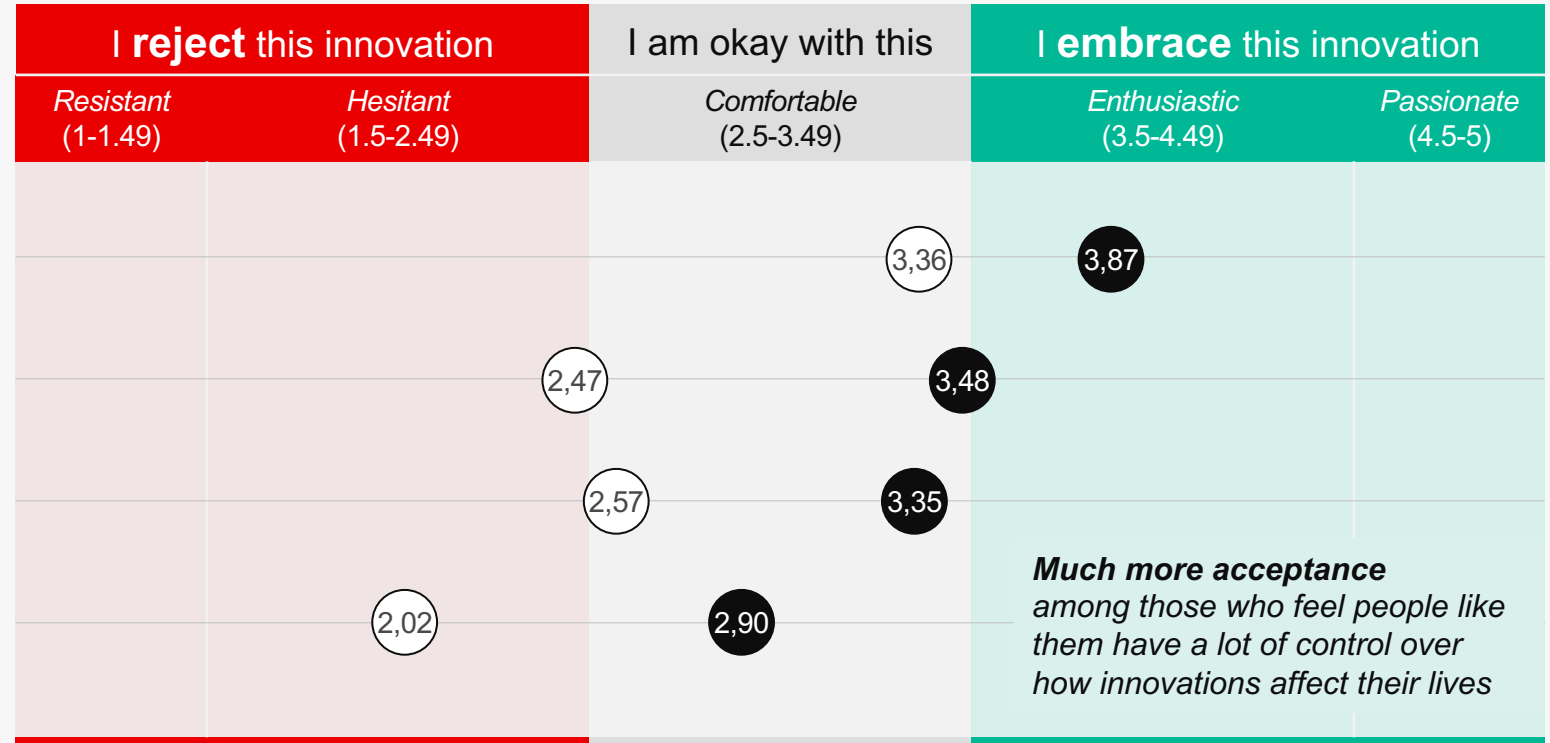
GLOBAL 28

Among those who believe
“people like me” have

○ little
● a lot of

control over how
these innovations
affect their lives

Green energy
AI
Gene-based medicine
GMO foods



2024 Edelman Trust Barometer. TEC_INF. How much influence or control do you feel people like you have over how these technologies are used in ways that might affect their lives? 5-point scale; top 2 box, a lot of control; bottom 2 box, a little control. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of control. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



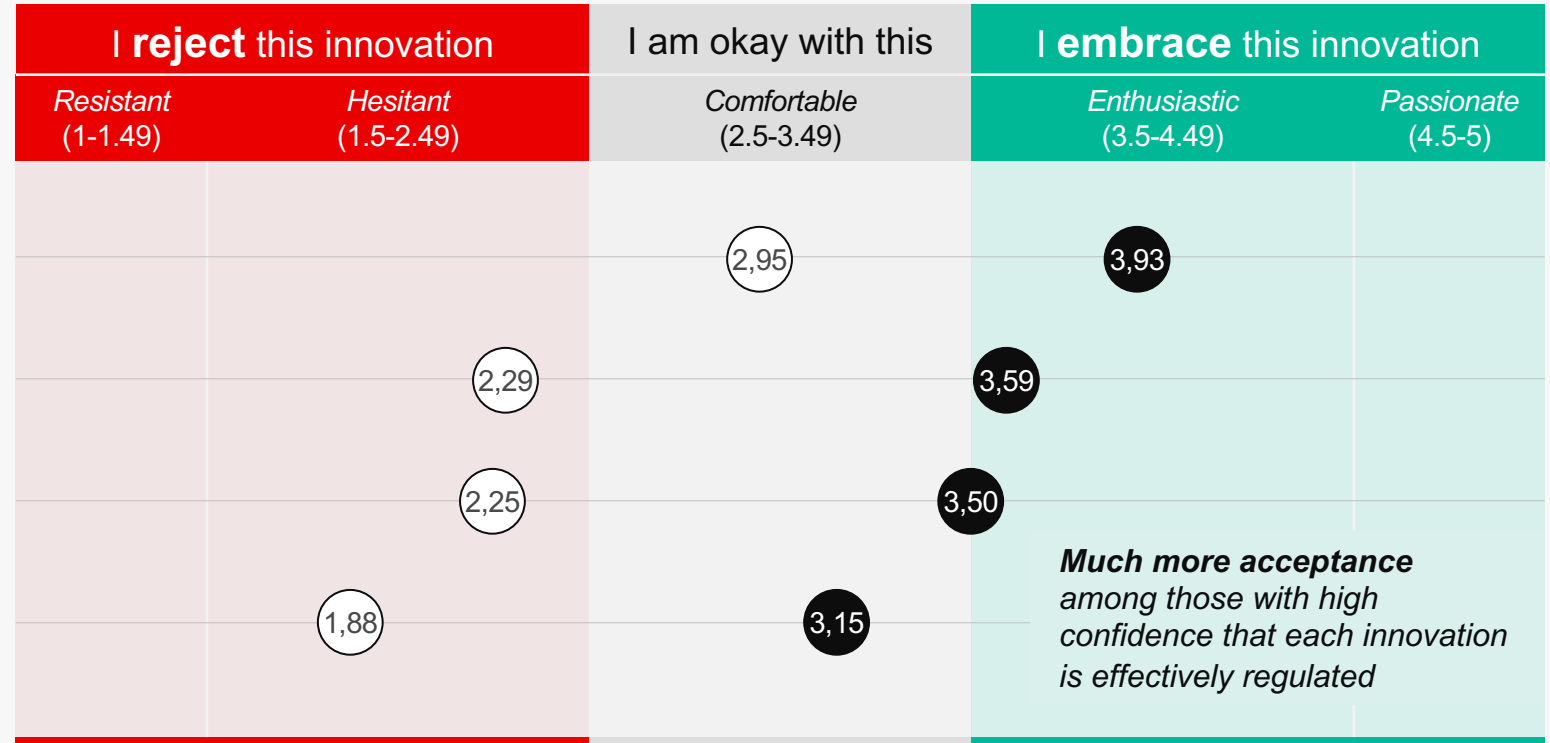
Confidence in Effective Regulation Drives Adoption

Average acceptance rating
for each innovation

GLOBAL 28

Among those who have
○ low ● high
confidence that each
innovation is
effectively regulated

Green energy
AI
Gene-based medicine
GMO foods



2024 Edelman Trust Barometer. TEC_SAF. How confident are you that each of the following is being effectively regulated? 5-point scale; top 2 box, high confidence; bottom 2 box, low confidence. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of confidence. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



Show Me How Innovation Will Bring Us a Better Future

Average acceptance rating

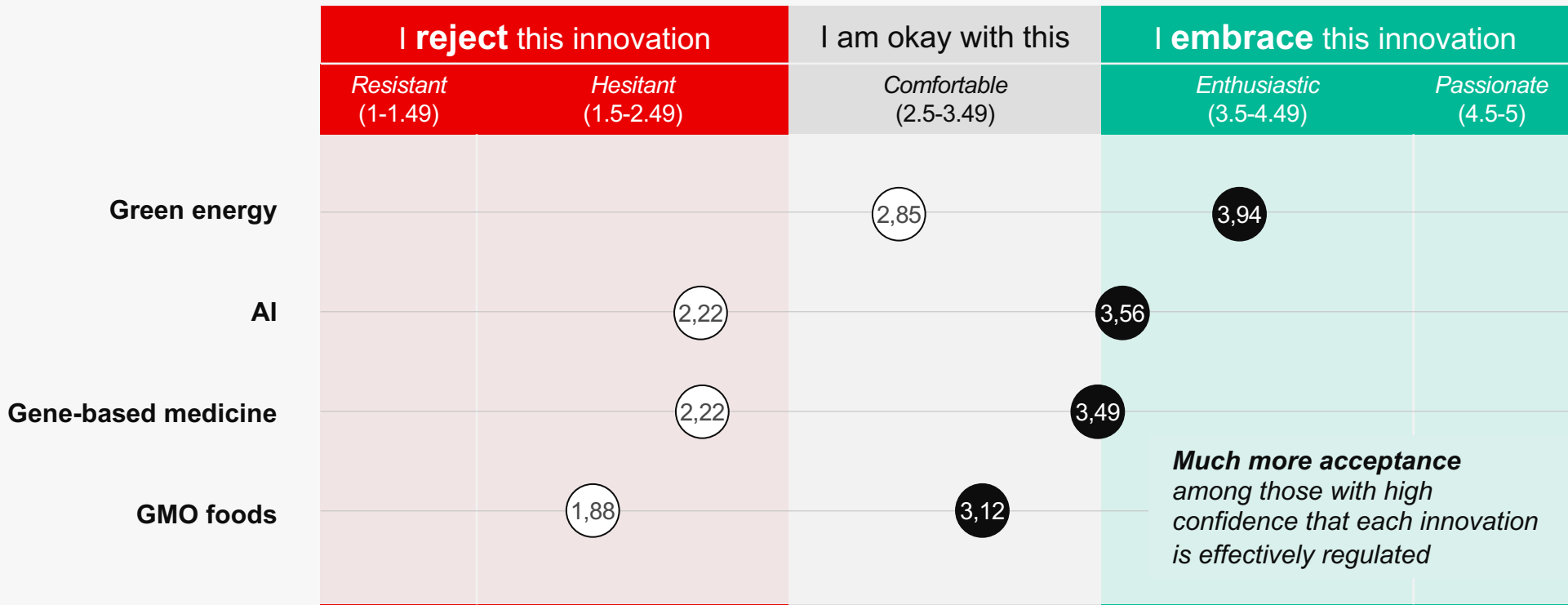
for each innovation

GLOBAL 28

Among those who have

○ low ● high

confidence that each innovation **will lead to a better future**



2024 Edelman Trust Barometer. TEC_FUT. How confident are you that these technologies will lead us to a better future? 5-point scale; top 2 box, high confidence; bottom 2 box, low confidence. Question asked of half the sample. CHG_TEC_COM. How would you characterize your feelings about each of the following? 5-point scale; data plotted is an average acceptance rating for each innovation. General population, 28-mkt avg., by level of confidence. For a full explanation of how the Average Acceptance Rating was calculated, please see the Technical Appendix.



Acceptance of Innovation at Stake, by Demographics

Percent who say

| | | Global 28 | Men | Women | Ages 18-34 | Ages 35-54 | Ages 55+ | Low income | Middle income | High income |
|---------------------|---------------------------|-----------|-----|-------|------------|------------|----------|------------|---------------|-------------|
| Green energy | I reject this innovation | 13 | 13 | 13 | 14 | 12 | 12 | 16 | 12 | 11 |
| | I embrace this innovation | 54 | 55 | 52 | 55 | 55 | 51 | 47 | 54 | 61 |
| AI | I reject this innovation | 35 | 32 | 38 | 29 | 33 | 44 | 39 | 35 | 29 |
| | I embrace this innovation | 30 | 33 | 28 | 37 | 32 | 21 | 27 | 30 | 37 |
| Gene-based medicine | I reject this innovation | 34 | 32 | 37 | 31 | 36 | 36 | 38 | 35 | 29 |
| | I embrace this innovation | 29 | 31 | 26 | 32 | 28 | 25 | 25 | 28 | 35 |
| GMO foods | I reject this innovation | 58 | 55 | 61 | 53 | 59 | 63 | 60 | 59 | 54 |
| | I embrace this innovation | 14 | 15 | 13 | 18 | 14 | 11 | 13 | 14 | 18 |



Technical Appendix



2024 Edelman Trust Barometer: Sample

Sample Size, Quotas and Margin of Error

| Country | Weighted Sample Size ¹ | Unweighted Sample Size | Margin of Error – Total Sample ³ | Margin of Error – Half Sample ³ | Quotas Set On ⁴ |
|------------------------|-----------------------------------|------------------------|---|--|---------------------------------|
| Global 28 ² | 32,200 | 32,492 | +/- 0.7 percentage points total sample | +/- 1.0 percentage points half sample | Quotas set at the country level |
| Argentina | 1,150 | 1,150 | +/- 3.8 pct pts. total sample | +/- 5.4 pct pts. half sample | Age, Gender, Region |
| Australia | 1,150 | 1,150 | | | |
| Brazil | 1,150 | 1,152 | +/- 3.3 pct pts. total sample | +/- 4.7 pct pts. half sample | |
| Canada | 1,150 | 1,500 | | | |
| China ⁵ | 1,150 | 1,150 | | | |
| Colombia | 1,150 | 1,150 | +/- 3.8 pct pts. total sample | +/- 5.4 pct pts. half sample | |
| France | 1,150 | 1,152 | | | |
| Germany | 1,150 | 1,150 | | | |
| India | 1,150 | 1,116 | | | |
| Indonesia | 1,150 | 1,152 | +/- 3.9 pct pts. total sample | +/- 5.5 pct pts. half sample | |
| Ireland | 1,150 | 1,151 | | | |
| Italy | 1,150 | 1,150 | | | |
| Japan | 1,150 | 1,151 | | | |
| Kenya | 1,150 | 1,150 | | | |
| Malaysia | 1,150 | 1,153 | | | |
| Mexico | 1,150 | 1,152 | | | |
| Netherlands | 1,150 | 1,150 | | | |
| Nigeria | 1,150 | 1,148 | | | |
| Saudi Arabia | 1,150 | 1,109 | | | |
| Singapore | 1,150 | 1,150 | +/- 3.8 pct pts. total sample | +/- 5.4 pct pts. half sample | |
| S. Africa | 1,150 | 1,152 | | | |
| S. Korea | 1,150 | 1,152 | | | |
| Spain | 1,150 | 1,150 | | | |
| Sweden | 1,150 | 1,151 | | | |
| Thailand | 1,150 | 1,151 | | | |
| UAE | 1,150 | 1,150 | | | |
| UK | 1,150 | 1,150 | | | |
| U.S. | 1,150 | 1,150 | | | |

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

2. The “global average” indicates the average result of all the countries where data was collected. As mentioned above, there has been no adjustment made to the population size relative to each country and the global average is not intended to suggest a total result of the entire global population.

3. Margin of error is calculated on the unweighted sample sizes collected, utilizing a 99% confidence interval.

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

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



2024 Edelman Trust Barometer: Sample

Countries Included in the Various Global Averages

| 28 countries surveyed | Global 28 average | Global 26 Excludes China and Saudi Arabia | Global 25 Excludes China, S. Korea, and Thailand | Global 22 |
|-----------------------|---|---|--|------------------------------------|
| | Used for current year averages and tracking to 2023 | Used for current year averages; excludes sensitive countries ¹ | Used for current year averages; excludes sensitive countries ¹ ; excludes S. Korea ² | Used for tracking to 2014 and 2015 |
| Argentina | Argentina | Argentina | Argentina | Argentina |
| Australia | Australia | Australia | Australia | Australia |
| Brazil | Brazil | Brazil | Brazil | Brazil |
| Canada | Canada | Canada | Canada | Canada |
| China | China | ---- | ---- | China |
| Colombia | Colombia | Colombia | Colombia | ---- |
| France | France | France | France | France |
| Germany | Germany | Germany | Germany | Germany |
| India | India | India | India | India |
| Indonesia | Indonesia | Indonesia | Indonesia | Indonesia |
| Ireland | Ireland | Ireland | Ireland | Ireland |
| Italy | Italy | Italy | Italy | Italy |
| Japan | Japan | Japan | Japan | Japan |
| Kenya | Kenya | Kenya | Kenya | ---- |
| Malaysia | Malaysia | Malaysia | Malaysia | Malaysia |
| Mexico | Mexico | Mexico | Mexico | Mexico |
| Netherlands | Netherlands | Netherlands | Netherlands | Netherlands |
| Nigeria | Nigeria | Nigeria | Nigeria | ---- |
| Saudi Arabia | Saudi Arabia | ---- | Saudi Arabia | ---- |
| Singapore | Singapore | Singapore | Singapore | Singapore |
| S. Africa | S. Africa | S. Africa | S. Africa | S. Africa |
| S. Korea | S. Korea | S. Korea | ---- | S. Korea |
| Spain | Spain | Spain | Spain | Spain |
| Sweden | Sweden | Sweden | Sweden | ---- |
| Thailand | Thailand | Thailand | ---- | ---- |
| UAE | UAE | 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 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. The three countries where we removed questions and/or answer options were China, Saudi Arabia, and Thailand.

2. Due to a translation inconsistency regarding the measure of competence in the four main institutions in S. Korea, the data was removed from the global average on the affected slide.



2024 Edelman Trust Barometer: Sample

Survey Languages Used and Internet Penetration by Country

| | Languages | Internet Penetration* | | Languages | Internet Penetration* | | Languages | Internet Penetration* |
|------------------|------------------------------------|-----------------------|---------------------|---------------------------|-----------------------|------------------|---------------------------------------|-----------------------|
| Global | - | - | Indonesia | Indonesian | 76% | Singapore | Localized English, Simplified Chinese | 92% |
| Argentina | Localized Spanish | 91% | Ireland | Localized English | 89% | S. Africa | Localized English, Afrikaans | 63% |
| Australia | Localized English | 89% | Italy | Italian | 91% | S. Korea | Korean | 97% |
| Brazil | Portuguese | 83% | Kenya | Localized English | 84% | Spain | Spanish | 92% |
| Canada | Localized English, Canadian French | 93% | Japan | Japanese | 93% | Sweden | Localized English, Swedish | 97% |
| China | Simplified Chinese | 70% | Malaysia | Malay | 94% | Thailand | Thai | 88% |
| Colombia | Localized Spanish | 83% | Mexico | Localized Spanish | 77% | UAE | Localized English, Arabic | 100% |
| France | French | 92% | Netherlands | Localized English, Dutch | 95% | UK | Localized English | 95% |
| Germany | German | 94% | Nigeria | Localized English | 68% | U.S. | English, Localized Spanish | 94% |
| India | Localized English, Hindi | 60% | Saudi Arabia | Localized English, Arabic | 89% | | | |

*Data source: <https://www.internetworldstats.com/stats.htm> as of Jan 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.



Data Analysis Explained:

French Data Model

In 2021, the translation of “government in general” in the French questionnaire was incorrectly changed to “authorities in general,” affecting data in all studies conducted in France from 2021 to 2023. When we discovered the inconsistency in early 2023, we suppressed all affected data while investigating the possibility of modeling and replacing the missing data.

Over the course of 2023, we built a data model that could reliably predict what the France data would have been if the translation were consistent. This involved identifying items (shown in the list on the right) that are predictive of trust in government in other Western democracies and testing whether they had similar predictive power in France.

To build a model with a sufficient level of accuracy, we iterated through 5,000 different randomly split samples, controlling for gender, income, age, and other demographics, of France data collected in the 2024 Edelman Trust Barometer and in the 2023 Special Report: Trust and Climate Change. In both surveys, we used the accurate translation for trust in “government in general,” along with the predictor variables. In both surveys, we also included the trust in “authorities in general” attribute for our French respondents. This allowed us to include the mistranslated variable in our model as one of the predictors for trust in government.

For each split sample, 75% of the sample was used to train the data, and the remaining 25% was used as a test group. Using a random forest classification model, we were able to accurately classify 89.41% of respondents as trusters or non-trusters, which gave us the confidence to repopulate the data in affected reports with data from our predictive model.

The modeled data was applied to the France data from each impacted year (2021, 2022, and 2023) to predict the overall level of trust in government in general. The Trust Index for those years has also been updated, given that trust in government is part of that calculation.

| Predictors | Question text |
|-------------------------------------|---|
| Trust in institutions | TRU_INS: Below is a list of institutions. For each one, please indicate how much you trust that institution 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”. |
| | Media in general |
| | Business in general |
| | Non-governmental organizations (NGOs) |
| Economic optimism | 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? |
| Government competence | TRU_3D_GOV: To what extent do you agree with the following statement? |
| | Government in general is good at what it does |
| Fears of gig-economy | 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? |
| | Permanent jobs with benefits being replaced by freelance, gig-economy or short-term jobs that do not offer benefits |
| Government ethics dimensions | GOV_PER_DIM: In thinking about why you do or do not trust government in general, please specify where you think it falls on the scale between the two opposing descriptions. |
| | Highly effective agent of positive change |
| | Honest and fair |
| | Has a vision for the future that I believe in |
| | Serves the interests of everyone equally and fairly |



Data Analysis Explained:

Innovation Management Scale

The Innovation Management scale was created by averaging respondents' answers to five attributes measured on 9-point scales, shown in the table to the right.

- Respondents who believe that innovation is well managed were those that scored between 1 – 4.49 on the Innovation Management Scale, meaning on average they disagreed with these statements.
- Respondents who scored between 4.5 – 5.49 on the scale were classified as neutral.
- Respondents who believe that innovation is poorly managed scored between 5.5 – 9 on the Innovation Management Scale, meaning on average they agreed with these statements.

The specific items in the scale were chosen for their ability to represent three dimensions of innovation management and development:

- **Trust in institutions** to manage the introduction of new technologies and innovations
- **Government's ability to regulate** emerging technologies effectively
- **Outside influence on science**, in terms of how it's conducted

| Items | Question text |
|---|---|
| Trust in business and NGOs | TRU_INS_TCNG. Below is a list of institutions. For each one, please indicate how much you trust that institution <u>to do what is right</u> when it comes to ensuring that the introduction of new technologies and innovations into society is well-managed (e.g., they are <u>safe</u> , <u>understood</u> by the public, <u>beneficial</u> to society as a whole, and <u>accessible</u> to the people who need them). – reverse scored |
| | Business in general |
| | Non-governmental organizations (NGOs) |
| Government regulation | POP_MDC. Below is a list of statements. For each one, please rate how <u>true</u> you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. |
| | The people in government in charge of regulating technology do not have an adequate understanding of emerging technologies to be able to regulate them effectively |
| Science influenced by politics and money | CHG_AGR. Please indicate how much you agree or disagree with the following statements. |
| | Science has become politicized in this country |
| | Government and other large organizations that fund research have too much influence on how science in this country is done |



Data Analysis Explained:

Classifying Respondents as Generally Resistant to Innovations

Respondents were asked to characterize their feelings about each of the four innovations (shown below) using the scale to the right.

To classify respondents as resistant to innovations, we calculated an average score across the four innovations. If a respondent's average score was less than 2.5 (rounded to a 1 or 2), they were classified as rejecting of innovation.

Innovations

The growing use of **artificial intelligence** such as machine learning, natural language processing, and generative AI

The growing use of **green energy** such as biofuels and renewable natural gas, liquid hydrogen, and wind and solar power

The growing use of **genetically modified foods** (foods that are derived from genetically modified organisms, commonly referred to as GMOs) such as drought-, pest-, and disease-resistant crops, faster-growing fish, and produce that has a longer shelf life

The growing use of **gene-based medical technologies** such as mRNA vaccines, gene splicing, and gene therapy

Scale points

1. **Resistant:** I am very worried about this. I boycott products and services that incorporate these technologies and urge others to do the same.
2. **Hesitant:** I am concerned about this. I personally try to avoid using products and services that incorporate these technologies.
3. **Comfortable:** I am okay with this. I will use products and services that incorporate these technologies but won't actively seek them out.
4. **Enthusiastic:** I am excited about this. I am looking to increase my use of products and services that incorporate these technologies.
5. **Passionate:** I am a big advocate for this. I am looking to increase my use of products and services that incorporate these technologies and actively encouraging others to do the same.



Data Analysis Explained:

Average Acceptance Rating

Respondents were asked to separately rate four technologies (green energy, artificial intelligence, gene-based medicine, and GMO foods, as shown on the previous Tech Appendix slide) on a 5-point scale, ranging from Resistant to Passionate (see full scale to the right). We calculated overall levels of acceptance across the population by taking the average scale point selected.

Segments of the population were classified as one of the five categories, based on the cut points in the table to the far right.

- If the average of an audience segment fell between 1-2.49, they were classified as “rejecting” the innovation.
- Audience segments with an average score of 3.5-5 were classified as “embracing” the innovation.

This method of calculating an average acceptance rating was applied to different audiences throughout the report.

| Segment category | Range |
|---|----------|
| Resistant: I am very worried about this. I boycott products and services that incorporate these technologies and urge others to do the same. | 1-1.49 |
| Hesitant: I am concerned about this. I personally try to avoid using products and services that incorporate these technologies. | 1.5-2.49 |
| Comfortable: I am okay with this. I will use products and services that incorporate these technologies but won't actively seek them out. | 2.5-3.49 |
| Enthusiastic: I am excited about this. I am looking to increase my use of products and services that incorporate these technologies. | 3.5-4.49 |
| Passionate: I am a big advocate for this. I am looking to increase my use of products and services that incorporate these technologies and actively encouraging others to do the same. | 4.5-5 |
| Don't know / not sure | |



Data Analysis Explained:

How We Plotted the Institutional Competence and Ethics Scores

We define trust as the combination of competence and ethics. The report features a chart depicting how competent and ethical each of the institution are rated to be. Here's how we calculated each score.

The competence score (the x-axis of the plot): An institution's competence score is a net of the top 3 box (AGREE) minus the bottom 3 box (DISAGREE) responses to the question "To what extent do you agree with the following statement? *[INSTITUTION] in general is good at what it does*". The resulting net score was then subtracted by 50, which means that for an institution to qualify as competent, it would require a net difference of 51 points or more in its percentage of top 3-box ratings versus its bottom 3-box ratings. This ensures that an institution could not be considered competent unless there is a majority who rate it as such.

The net ethical score (the y-axis of the plot): The ethics dimension is defined by four separate items. For each item, a net score was calculated by taking the top 5 box percentage representing a positive ethical perception minus the bottom 5 box percentage representing a negative ethical perception. The y-axis value is an average across those 4 net scores. Scores higher than zero indicate an institution that is perceived as ethical.

Respondents were asked:

In thinking about why you do or do not trust *[INSTITUTION]*, please specify where you think they fall on the scale between the two opposing descriptions. *(Please use the slider to indicate where you think [INSTITUTION] falls between the two extreme end points of each scale.)*

| Dimension | Ethical Perception | Unethical Perception |
|----------------|--|---|
| Purpose-Driven | Highly effective agents of positive change | Completely ineffective agents of positive change |
| Honest | Honest and fair | Corrupt and biased |
| Vision | Have a vision for the future that I believe in | Do not have a vision for the future that I believe in |
| Fairness | Serve the interests of everyone equally and fairly | Serve the interests of only certain groups of people |



**Full Question
Text**



2024 Edelman Trust Barometer:

Full Text For Answer Choices Abbreviated

Dispersion of Authority: Peers on Par With Scientists

TRU_PEP_TCNG. Below is a list of categories of people. For each one, please indicate how much you trust that person or group of people to tell you the truth about new innovations and technologies. (Please select one response for each.)

| Shortened | Full |
|--------------------------|---|
| NGO representatives | A representative of a non-profit organization or NGO |
| Scientists | Scientists or technical experts in general |
| Company technical expert | A scientist or technical expert working for a company that is helping to develop the new innovation or technology |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Economic Fears Persist as Societal Concerns Rise

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? Please indicate your answer using a nine-point scale where one means “I do not worry about this at all” and nine means “I am extremely worried about this”. (Please select one response for each.)

| Shortened | Full |
|-----------------|---|
| Job loss (net) | Automation and/or other innovations taking your job away Your job being moved to other countries where workers are paid less Cheaper foreign competitors driving companies like yours out of business Not having the training and skills necessary to get a good paying job International conflicts about trade policies and tariffs hurting the company you work for Losing your job as a result of a looming recession Permanent jobs with benefits being replaced by freelance, gig-economy, or short-term jobs that do not offer benefits |
| Inflation | Your pay increases not keeping up with the inflation rate causing you to lose ground financially |
| Climate change | Climate change leading to drought, rising sea levels and other natural disasters |
| Hackers | Hackers, cyber-attacks and cyber-terrorism |
| Nuclear war | International conflicts escalating into nuclear war |
| Information war | Other countries waging an information war against us by purposefully contaminating our media with falsehoods and publishing things meant to inflame our differences |



2024 Edelman Trust Barometer:

Full Text For Answer Choices Abbreviated

Trust in Industry Sectors Does Not Guarantee Trust in Industry Innovations

TEC_TRU. How much do you trust each of these technologies? (Please select one response for each.)

| Shortened | Full |
|----------------------------|---|
| Artificial intelligence | Artificial intelligence such as machine learning, natural language processing, and generative AI |
| Genetically modified foods | Genetically modified foods (foods that are derived from genetically modified organisms, commonly referred to as GMOs) such as drought-, pest-, and disease-resistant crops, faster-growing fish, and produce that has a longer shelf life |
| Green energy | Green energy such as biofuels and renewable natural gas, liquid hydrogen, and wind and solar power |
| Gene-based medicine | Gene-based medical technologies such as mRNA vaccines, gene splicing, and gene therapy |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Acceptance of Innovation at Stake

CHG_TEC_COM. How would you characterize your feelings about each of the following?

| Shortened | Full |
|---------------------------|--|
| I reject this innovation | Resistant: I am very worried about this. I boycott products and services that incorporate these technologies and urge others to do the same Hesitant: I am concerned about this. I personally try to avoid using products and services that incorporate these technologies. |
| I embrace this innovation | Enthusiastic: I am excited about this. I am looking to increase my use of products and services that incorporate these technologies. Passionate: I am a big advocate for this. I am looking to increase my use of products and services that incorporate these technologies and actively encouraging others to do the same. |
| Green energy | The growing use of green energy such as biofuels and renewable natural gas, liquid hydrogen, and wind and solar power |
| AI | The growing use of artificial intelligence such as machine learning, natural language processing, and generative AI |
| Gene-based medicine | The growing use of gene-based medical technologies such as mRNA vaccines, gene splicing, and gene therapy |
| GMO foods | The growing use of genetically modified foods (foods that are derived from genetically modified organisms, commonly referred to as GMOs) such as drought-, pest-, and disease-resistant crops, faster-growing fish, and produce that has a longer shelf life |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Government Lacks Competence to Regulate Emerging Innovations

POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. (Please select one response for each.)

| Shortened | Full |
|---|--|
| Government regulators lack adequate understanding of emerging technologies to regulate them effectively | The people in government in charge of regulating technology do not have an adequate understanding of emerging technologies to be able to regulate them effectively |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Nearly 2x More Likely to Fear Innovation Poorly Managed

TRU_INS_TCNG. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right when it comes to ensuring that the introduction of new technologies and innovations into society is well-managed (e.g., they are safe, understood by the public, beneficial to society as a whole, and accessible to the people who need them). (Please select one response for each.)

| Shortened | Full |
|--|---|
| Do I trust how business and NGOs introduce innovations into society? | Business in general Non-governmental organizations |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Nearly 2x More Likely to Fear Innovation Poorly Managed

POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. (Please select one response for each.)

| Shortened | Full |
|---|--|
| Can government regulate new technologies? | The people in government in charge of regulating technology do not have an adequate understanding of emerging technologies to be able to regulate them effectively |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Nearly 2x More Likely to Fear Innovation Poorly Managed

CHG_AGR. Please indicate how much you agree or disagree with the following statements. (Please select one response for each.)

| Shortened | Full |
|---|--|
| Is science independent of politics and money? | Science has become politicized in this country. Government and other large organizations that fund research have too much influence on how science in this country is done. |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

When Institutions Mismanage Innovation, We Feel Both Technology and Society Are Leaving Us Behind

POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. (Please select one response for each.)

Shortened

Full

Technology is changing too quickly, in ways that are not good for people like me

Technological innovations are happening too quickly and are leading to changes that are not good for people like me



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

When Institutions Mismanage Innovation, Fairness and Capitalism in Question

POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. (Please select one response for each.)

Shortened

The system is biased in favor of the rich

Full

The system is biased against regular people and in favor of the rich and powerful



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Scientists and Experts Expected to Lead on Implementation of Innovation

RSP_TEC_CHG. How big a role do you feel each of the following should have in ensuring that the introduction of new technologies and innovations is well-managed (e.g., they are safe, understood by the public, beneficial to society as a whole, and accessible to the people who need them)? (Please select one response for each.)

| Shortened | Full |
|------------------------------|---|
| CEOs that deploy innovations | The CEOs of the companies that produce, sell, or use these technologies |
| Central government leaders | Central / federal government leaders |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

To Earn My Acceptance, Show Me the Innovation Is Vetted by Scientists and Ethicists

TEC_TST. How confident are you that these technologies have been adequately tested, evaluated, and assessed by scientists, ethicists, and other experts?
(Please select one response for each.)

Shortened

Confidence that each innovation has been evaluated by scientists and ethicists

Full

How confident are you that these technologies have been adequately tested, evaluated, and assessed by scientists, ethicists, and other experts?



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

I'm Doing My Own Research: Help Me Find Information I Can Trust

INO_INF_SRC: Where do you get most of your information and knowledge about new technologies and innovations from?

| Shortened | Full |
|-----------------------|---|
| Social media (net) | My social media news feed On social media posted by, or forwarded from, someone in my social network |
| National media | National newspapers or national TV or radio news programs |
| My friends and family | In conversations with my friends and family |
| Local media | Local newspapers or local TV or radio news programs |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

To Be Trusted With Innovation, Give Me a Voice

[INS]_CHG_PER. If [institution] wants to earn or keep your trust in their being good stewards or managers of change, how important is it that they do each of the following in response to the technological and social changes taking place in your country today? (Please select one response for each.)

| Shortened | Full |
|---|--|
| Hear our concerns, let us ask questions | Give people the opportunity to ask questions and to have their concerns heard when it comes to change and innovation |
| Keep innovations affordable | Institute fair and reasonable pricing that makes new technologies or innovations generally affordable |
| Communicate pluses and minuses | Clearly communicate the nature of new innovations and technologies, including potential benefits and negative side effects |
| Aid the vulnerable | Aid those who need help coping with the consequences of change |
| Help people keep up | Help people keep up with and adjust to the changes happening all around them |
| Institute safeguards | Institute safeguards to protect us from potential harm or exploitation by new technologies developed in other countries |
| Ensure our country isn't falling behind | Make sure that our country is not falling behind in the tech and innovation space or take steps to address a current gap |
| Investigate innovations | Do investigative reporting on new technologies and innovations to uncover any hidden issues or dangers |



2024 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

CEOs: Address Impacts of Innovation in Society

CEO_RSP_CHOICE. You are about to see two choices. We want you to choose the one that best describes your beliefs. (Please select only one of the two options given.)

Shortened

I expect CEOs to manage changes occurring in society, not just those occurring in their business

Full

I expect CEOs to work to manage changes that are occurring in society in addition to those occurring within their organizations or that are directly related to their products and services



2024 Edelman Trust Barometer:

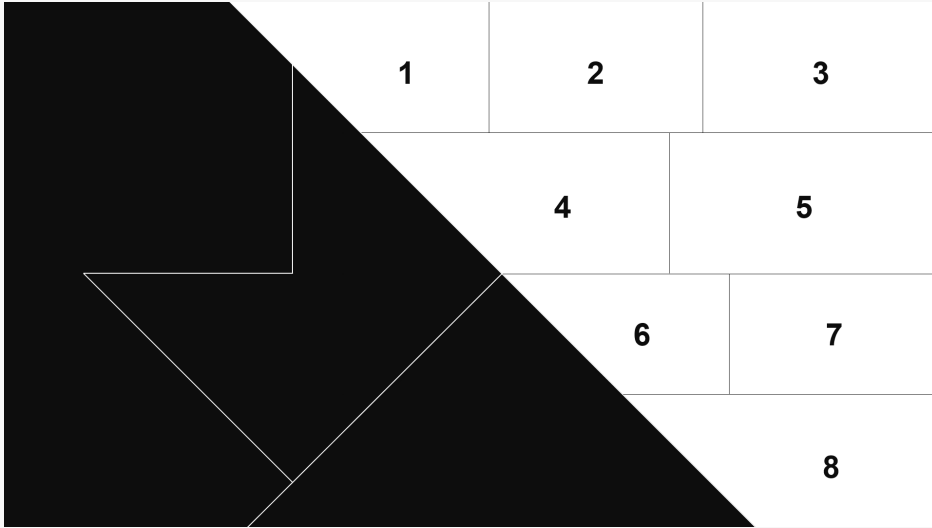
Full Text For Answer Choices Abbreviated

CEOs: Address Impacts of Innovation in Society

CEO_ISS. How important is it to you that the CEO or head of the organization you work for speaks out publicly about each of the following issues? Please indicate your answer using the following 9-point scale where one means “not at all important” and nine means “very important” (Please select only one response for each.)

| Shortened | Full |
|---------------------------|--|
| Job skills of the future | Training, education, and job skills of the future |
| Ethical use of technology | The ethical use of technology |
| Automation impact on jobs | Technology and automation and their impact on jobs |





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Slide 5 The Decline of Authority

Supporters of former President Jair Bolsonaro clash with security forces as they raid the National Congress in Brasilia, Brazil, 08 January 2023. *Joedson Alves/Anadolu Agency via Getty Images*

Slide 15 Innovation on the Ballot

A tractor with a flag that translates into “When farmers starve, hunger is born” drives back from a rural farmers’ protest against the government’s plan to curb nitrogen pollution by 70 percent by 2030, in Stroe, near Amsterdam: *Sem Van Der Wal/ANP/AFP via Getty Images*

Slide 25 A Reset for Science in Society

World Health Organization (WHO) Director-General Tedros Adhanom Ghebreyesus attends a daily press briefing on the COVID-19 outbreak: *Fabrice Coffrini/AFP via Getty Images*

Slide 32 Restoring Trust in the Promise of Innovation

Technician in sterile coverall holds wafer that reflects many different colors: *PonyWang via Getty Images*



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