@EdelmanItalia

#TrustBarometer

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Edelman

21st ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online survey in 28 countries*

33,000+ respondents

2021 Edelman Trust Barometer fieldwork conducted from October 19 to November 18, 2020

**The 2021 Trust Barometer 27-market global averages (for the general population, mass population and informed public) do not include Nigeria*

27-market global data margin of error: General population +/- 0.6% (N=31,050); informed public +/- 1.3% (N=6,000); mass population +/- 0.6% (N=25,050+); half-sample global general online population +/- 0.8% (N=15,525).
Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

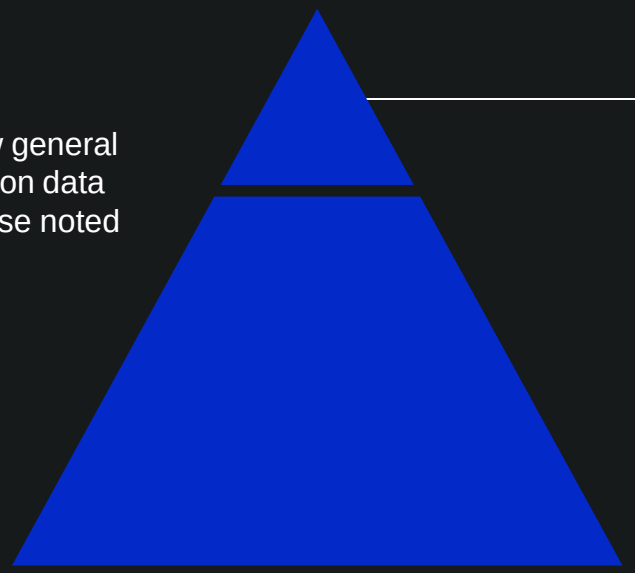
U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).
U.S. Post-Election Supplement ethnicity-specific data margin of error: Non-Hispanic White +/- 3.3% (N=894); all others +/- 4.0 (N=607).

General Online Population

1,150
respondents per country

Ages
18+

All slides show general online population data unless otherwise noted



Informed Public

500 respondents in U.S. and China;
100 respondents in Nigeria;
200 in all other countries

Represents **17%** of total global population

Must meet 4 criteria:

- Age **25-64**
- College-educated
- In top **25%** of household income per age group in each country
- Report significant engagement in public policy and business news

Mass Population

All population not including informed public

Represents **83%** of total global population

U.S. Post-Election Supplement

1,500 U.S. respondents, fielded December 14 to 18, 2020

21 YEARS OF TRUST

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from “Authorities” to Peers	A “Person Like Me” Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummets	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust

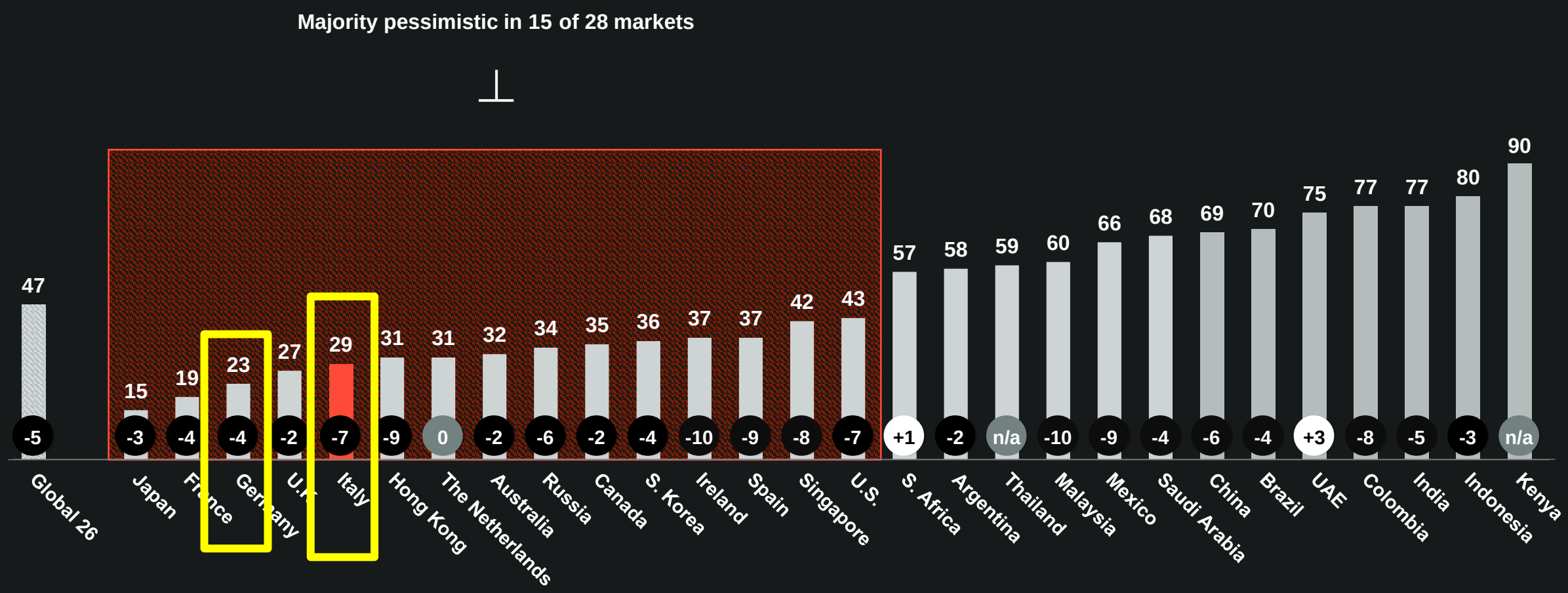
2012	2013	2014	2015	2016	2017	2018	2019	2020	**2021**
Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	The Battle for Truth	Trust at Work	Trust: Competence and Ethics	**Declaring Information Bankruptcy**

WHERE WE COME FROM
(THE WORLD PRE COVID-19)

PESSIMISTIC ABOUT ECONOMIC PROSPECTS

Percent who believe they and their families will be better off in five years' time

- 0 + Change, 2019 to 2020



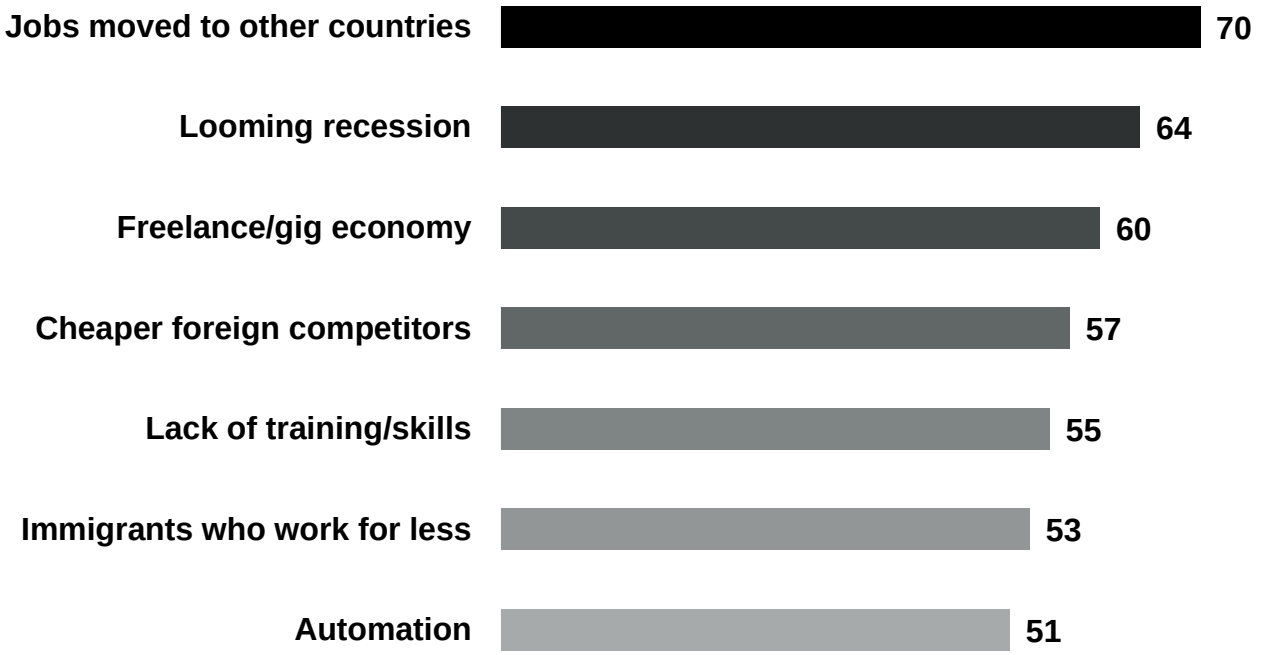
2020 Edelman Trust Barometer. CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time?
5-point scale; top 2 box, better off. General population, 26-mkt avg.

WORRY ABOUT THE FUTURE OF WORK

Percent of employees in Italy who worry about job loss due to each issue

I worry about **losing my job** due to one or more of these causes

87%



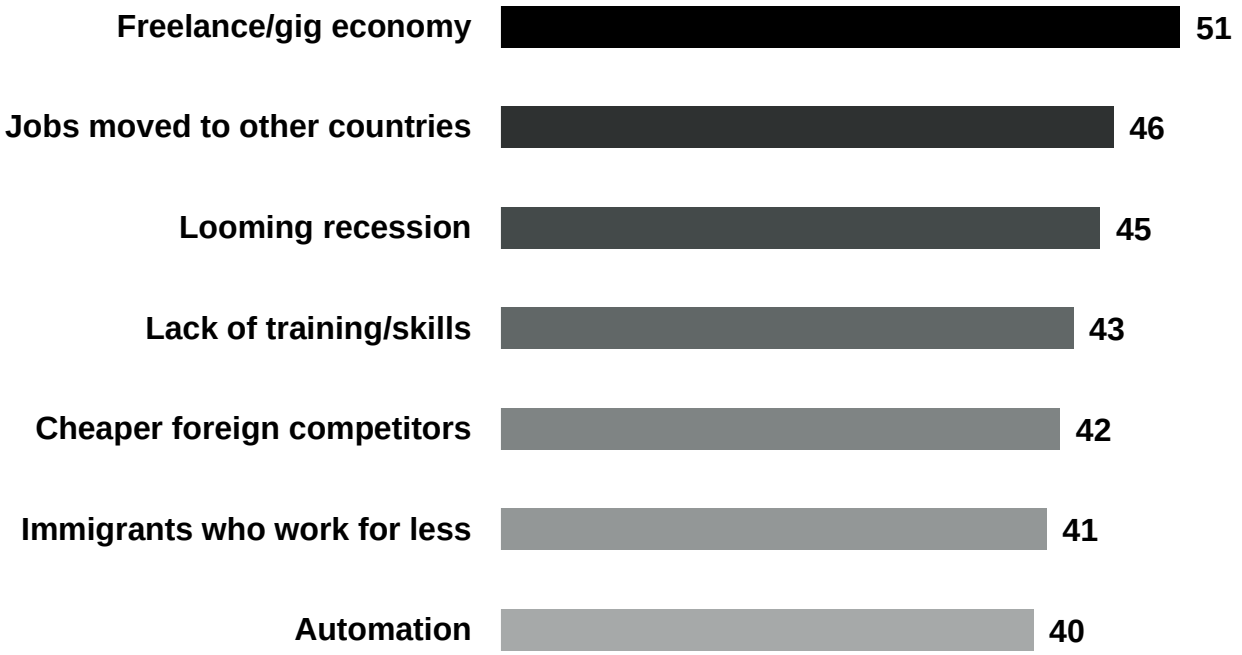
2020 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worried. Job loss net = codes 1,2,3,4,5,23,24. General population, Italy, among those who are employed (Q43/1).

WORRY ABOUT THE FUTURE OF WORK

Percent of employees in Germany who worry about job loss due to each issue

I worry about **losing my job** due to one or more of these causes

73%



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JOB LOSS

Percent who are worried about losing their job due to each reason

- **Highest job loss worry** in each market
- **Second-highest job loss worry**
- **Third-highest job loss worry**

	Gig-economy	Looming recession	Lack of training/skills	Foreign competitors	Immigration	Automation	Job moved abroad
Argentina	61	65	57	55	54	51	46
Australia	60	51	51	49	48	45	41
Brazil	64	67	68	56	52	58	54
Canada	56	49	50	42	43	45	36
China	65	62	67	59	56	63	59
Colombia	74	74	69	69	74	65	60
France	65	54	54	51	52	55	[illegible]
Germany	51	45	43	42	41	40	**46**
Hong Kong	60	52	58	46	49	50	[illegible]
India	82	80	81	79	80	77	77
Indonesia	61	58	61	58	56	57	52
Ireland	57	55	50	45	42	39	[illegible]
Italy	60	64	55	57	53	51	**70**
Japan	44	37	45	38	44	38	[illegible]
Kenya	64	64	63	58	49	52	49
Malaysia	70	71	67	73	71	69	61
Mexico	71	71	67	64	59	60	59
Russia	49	60	49	38	43	34	27
Saudi Arabia	47	48	44	46	45	41	44
Singapore	67	67	66	64	67	59	60
S. Africa	61	70	63	53	55	51	45
S. Korea	60	69	57	58	50	63	44
Spain	68	66	65	62	58	57	58
Thailand	68	76	67	66	67	65	60
The Netherlands	49	34	38	36	38	35	29
UAE	62	65	63	62	64	59	59
U.K.	53	52	49	46	44	46	**43**
U.S.	55	49	51	42	47	46	40

2020 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, worried. General population, 28-mkt avg, among those who are employed (Q43/1).

WORRY TECHNOLOGY IS OUT OF CONTROL

Percent in Italy who agree

The pace of change in technology is **too fast**	I worry technology will make it impossible to know if **what people are seeing or hearing is real**	Government **does not understand emerging technologies** enough to regulate them effectively
67%	**59%**	**80%**

Trust in technology 2019-2020	
Global 26	**-4**
Largest declines in:	
France	**-10**
Canada, Italy, Russia, Singapore	**-8**
U.S.	**-7**
Australia	**-6**

2020 Edelman Trust Barometer. CNG_POC. For the statements below, please think about the pace of development and change in society today and select the response that most accurately represents your opinion. 9-point scale; top 4 box, fast. Italy. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Italy. PER_GOV. How well do you feel the government is currently doing each of the following? 5-point scale; bottom 3 box, not doing well (data excludes DK responses). Italy. 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. 26-mkt avg. All questions asked of half of the sample among the general population.

WORRY TECHNOLOGY IS OUT OF CONTROL

Percent in Germany who agree

The pace of change in technology is **too fast**	I worry technology will make it impossible to know if **what people are seeing or hearing is real**	Government **does not understand emerging technologies** enough to regulate them effectively
50%	**59%**	**75%**

Trust in technology 2019-2020	
Global 26	**-4**
Largest declines in:	
France	**-10**
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WORRY ABOUT QUALITY INFORMATION

Percent in Italy who agree

The media I use are **contaminated with untrustworthy information**

63%

I worry about false information or **fake news being used as a weapon**

76%

+6 pts

Change, 2018 to 2020

2020 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Italy.

WORRY ABOUT QUALITY INFORMATION

Percent in Germany who agree

The media I use are **contaminated with untrustworthy information**

36%

I worry about false information or **fake news being used as a weapon**

68%

+7 pts

Change, 2018 to 2020

2020 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Germany.

PANDEMIC PUTS TRUST TO THE TEST

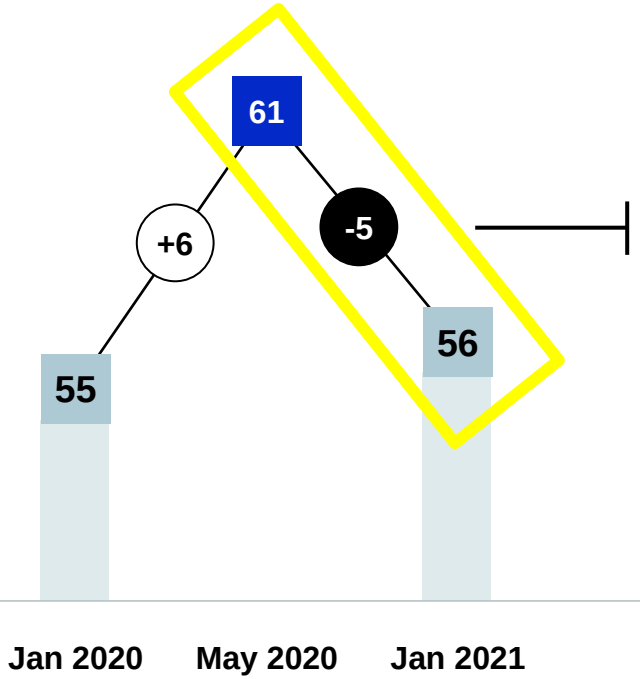
SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

Trust Index, 11 countries included in the 2020 Trust Barometer Spring Update

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

Change, wave to wave: - 0 +

Global 11



	+/- May 2020 to Jan 2021
Government	**-8**
Media	**-6**
NGOs	**-6**
Business	**-3**

Government was the most trusted institution in May, then lost its lead 6 months later

Government	*+/- Jan 2020 to May 2020*	***+/- May 2020 to Jan 2021***
S. Korea	+16	**-17**
UK	+24	**-15**
China	+5	**-13**
Mexico	+12	**-12**
Canada	+20	**-11**
India	+6	**-8**
U.S.	+9	**-6**
Germany	+19	**-5**
Japan	-5	**-1**
Saudi Arabia	+5	**-1**
France	+13	**+2**

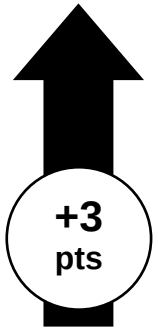
2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt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

IN ITALY, TRUST IN GOVERNMENT RISES YEAR-TO-YEAR

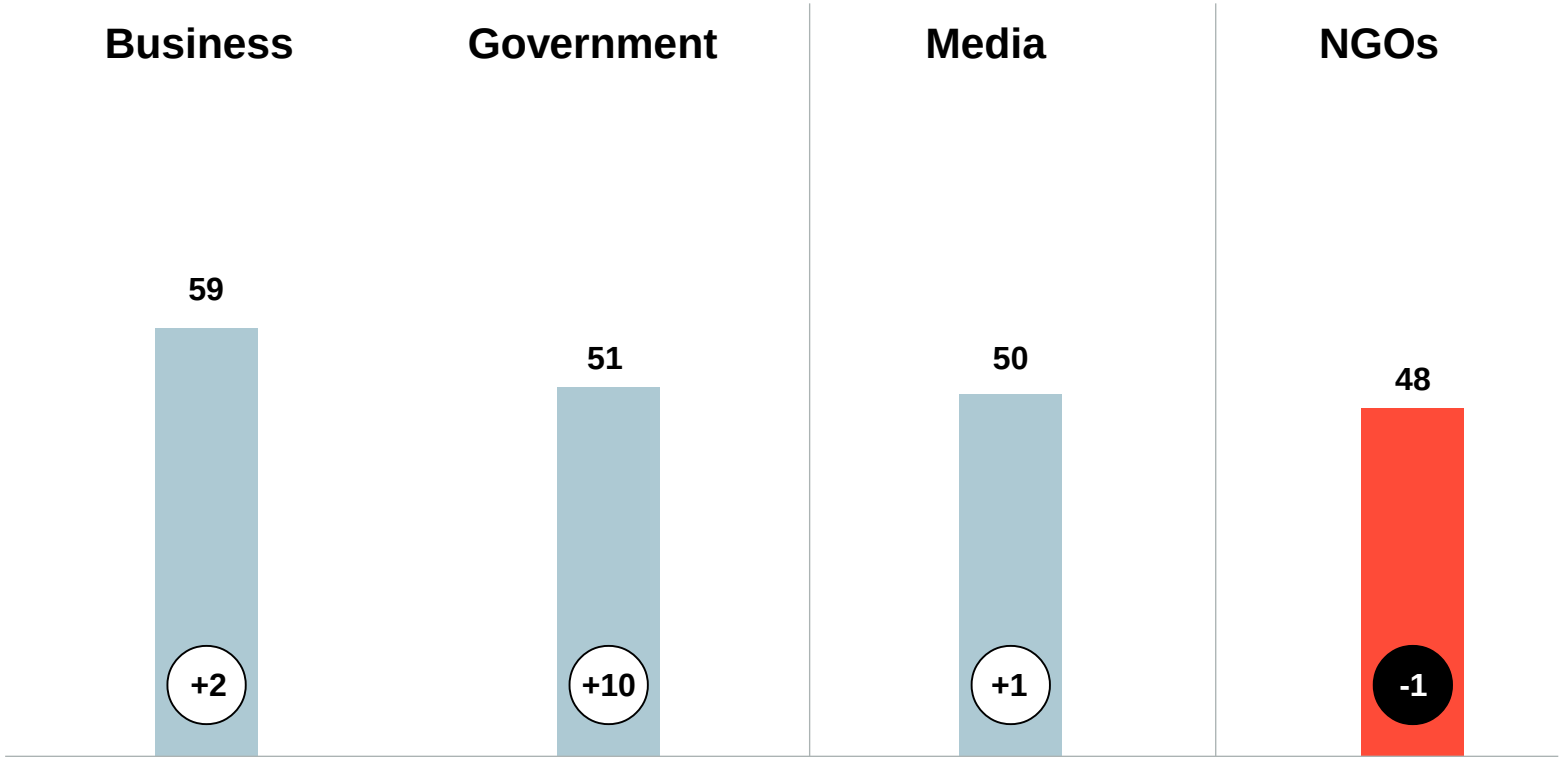
Percent trust, in Italy

52

TRUST INDEX



Change, 2020 to 2021



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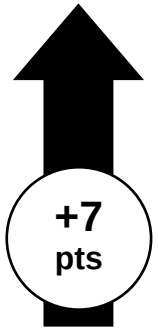
YEAR-ON-YEAR, ALL INSTITUTIONS GAIN TRUST

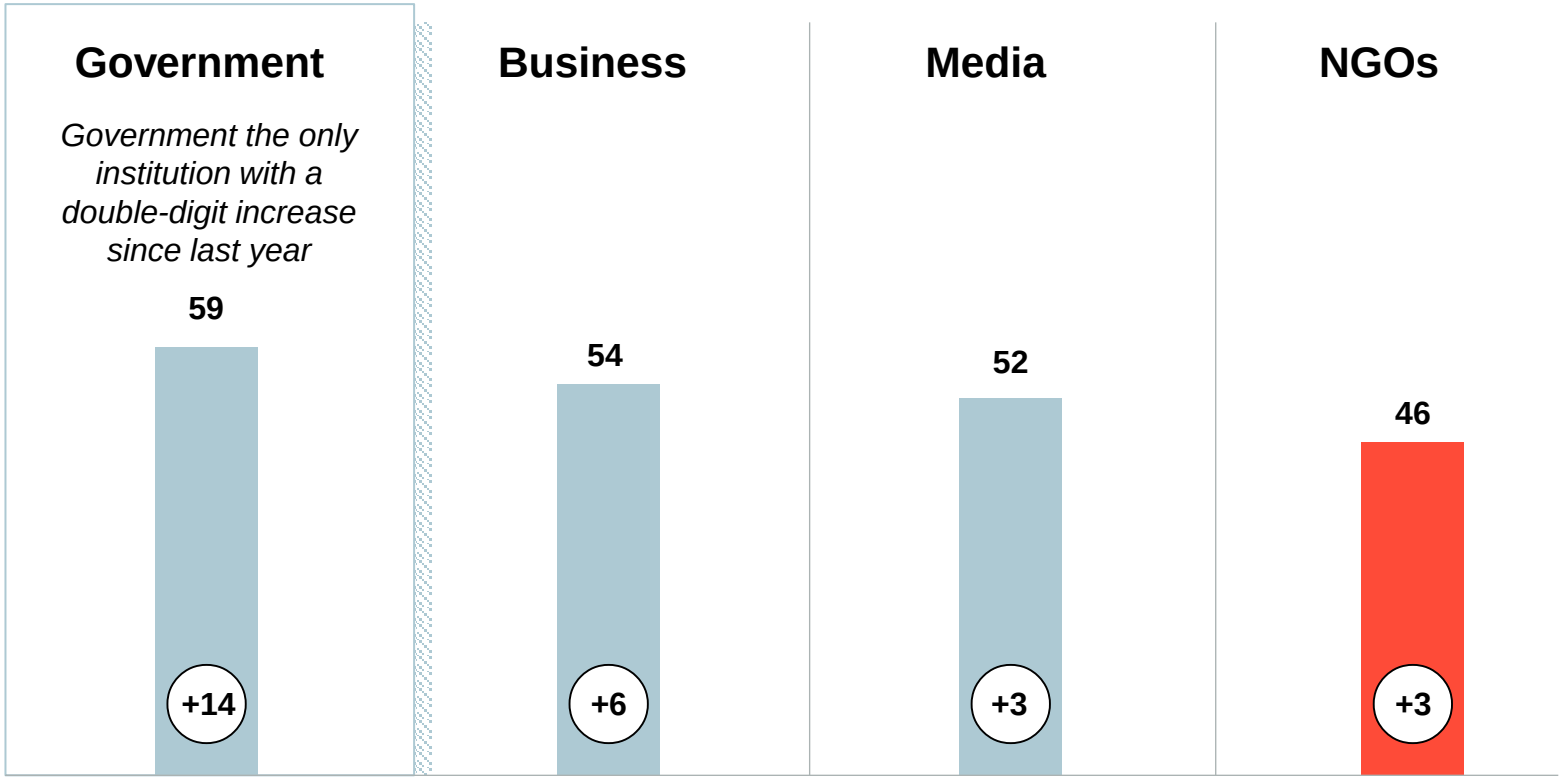
Percent trust, in Germany

53

TRUST INDEX



Change, 2020 to 2021



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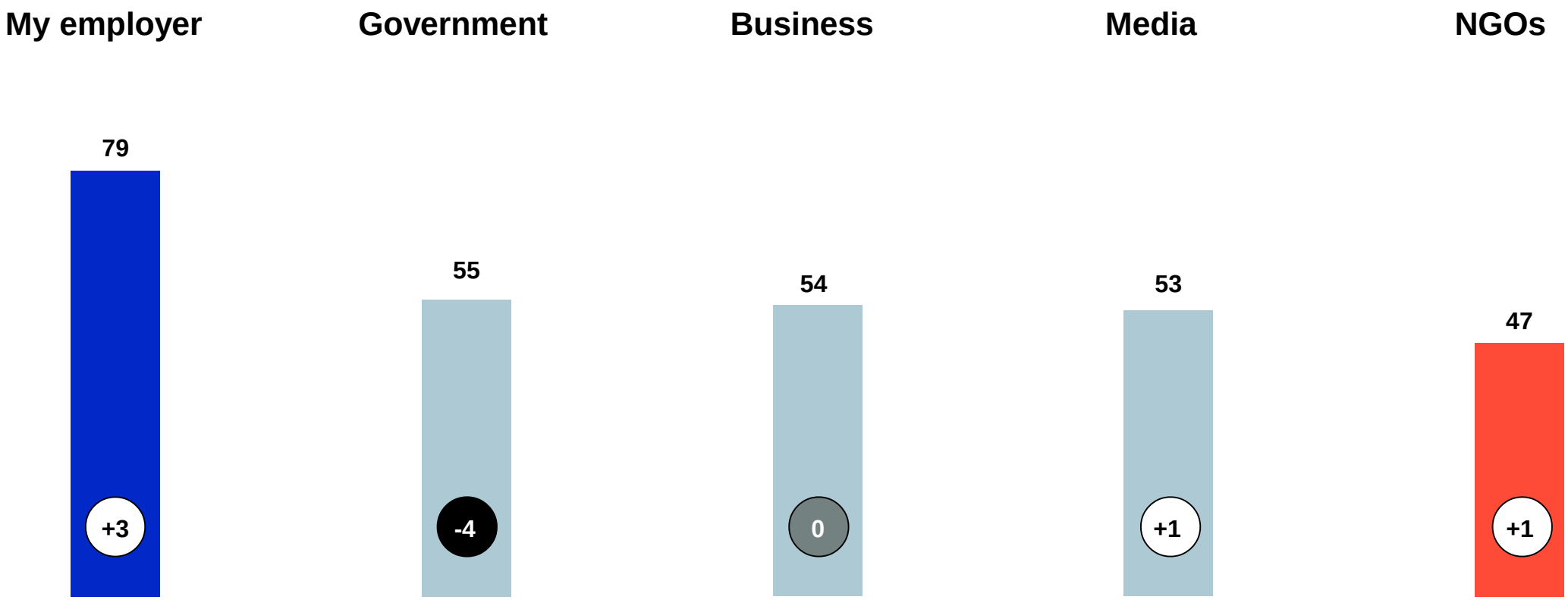
MY EMPLOYER ONLY TRUSTED INSTITUTION

Percent trust, in Germany

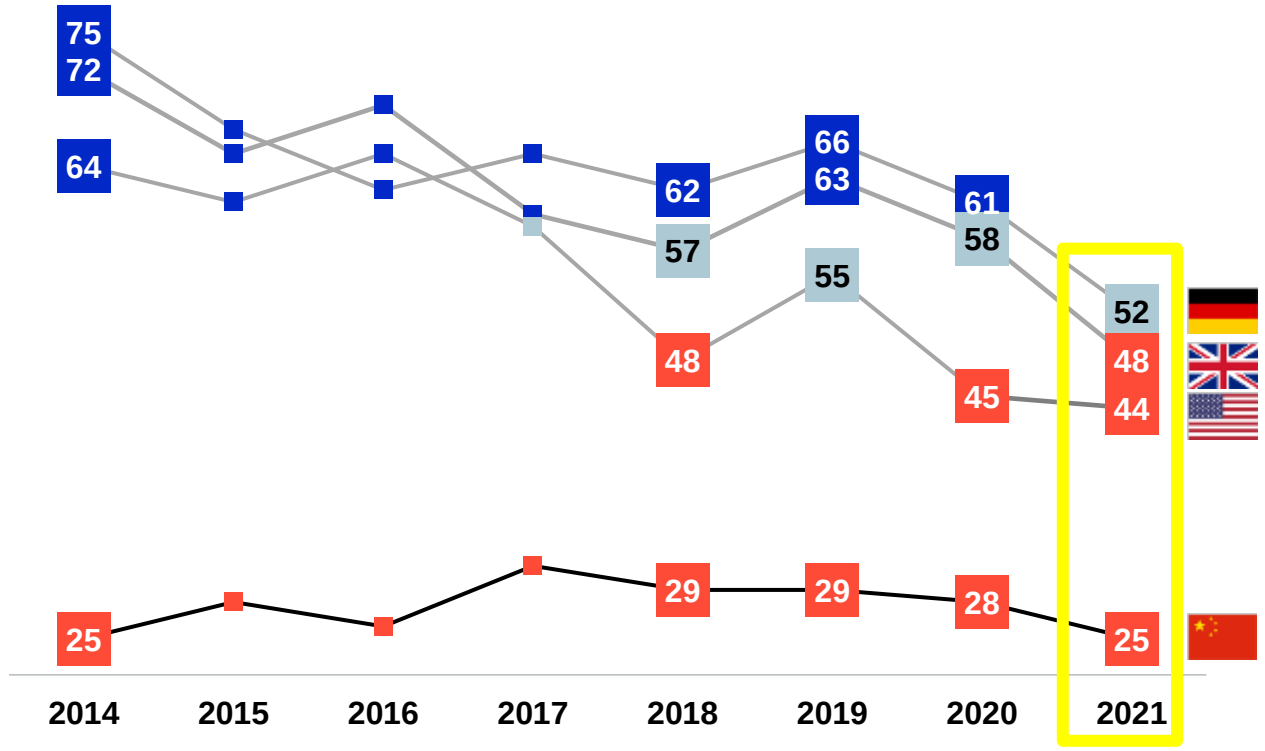


2021 Edelman Trust Barometer Spring Update: A World in Trauma. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, Germany. "Your employer" asked among those who are employed (Q43/1).

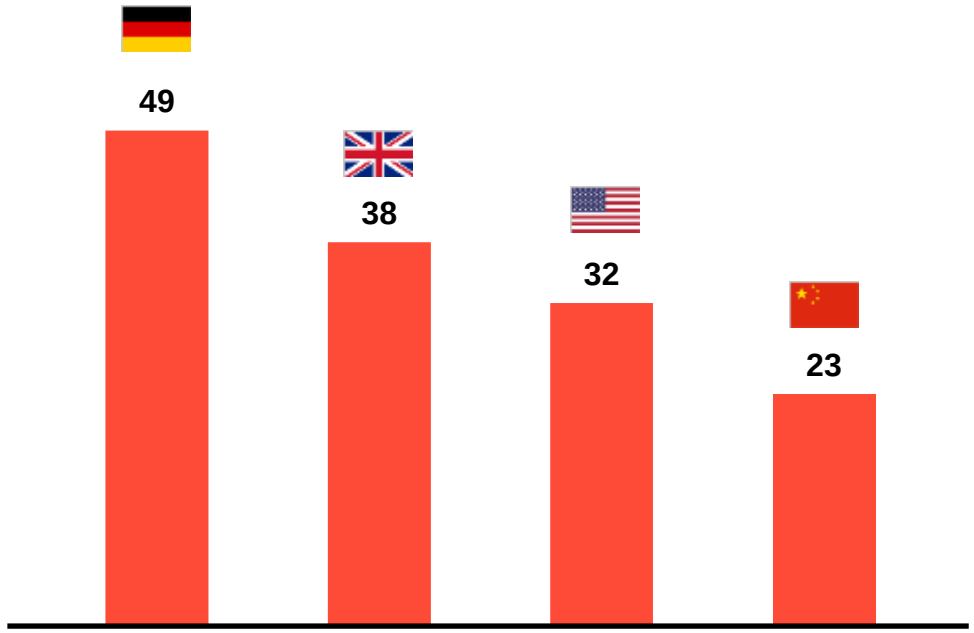
AMONG RESPONDENTS IN ITALY, LACK OF TRUST IN FOREIGN COUNTRIES

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

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



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

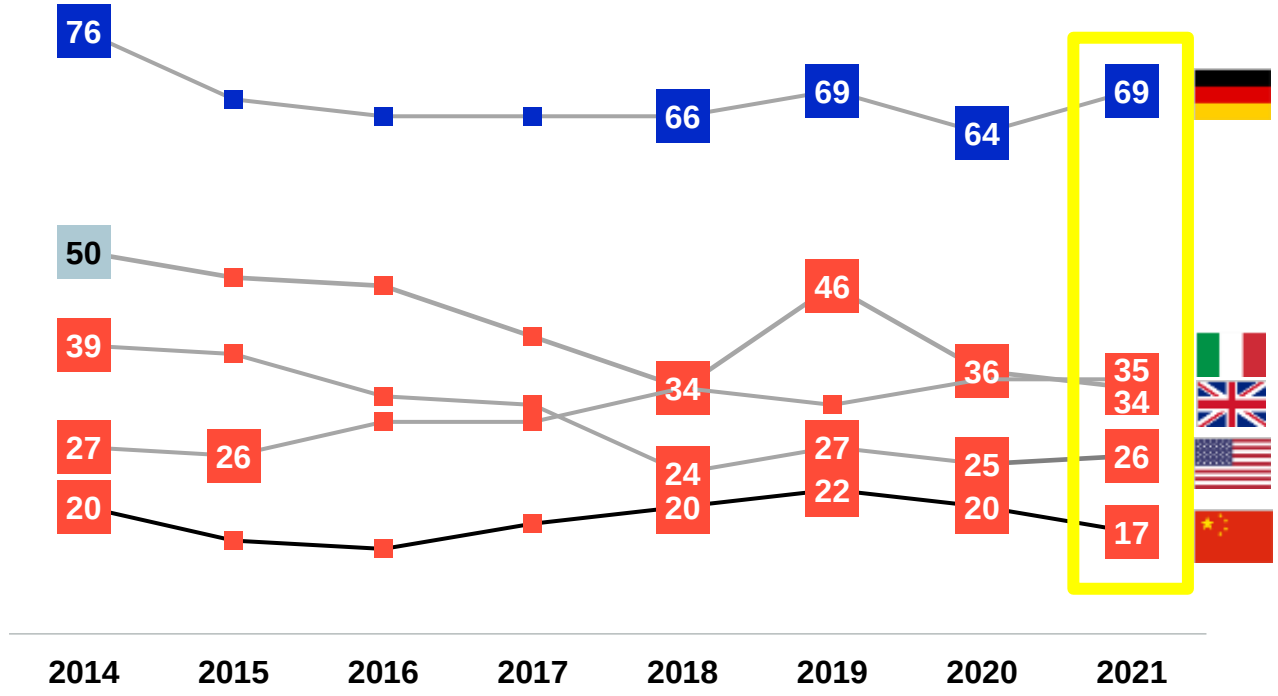


2021 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. TRU_GOV. Please indicate how much you trust the national government of each of the following countries to do what is right using a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. Question asked of half of the sample. Respondents were not asked to rate their home country. General population, Italy.

AMONG RESPONDENTS IN GERMANY, FOREIGN COUNTRIES DISTRUSTED

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

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



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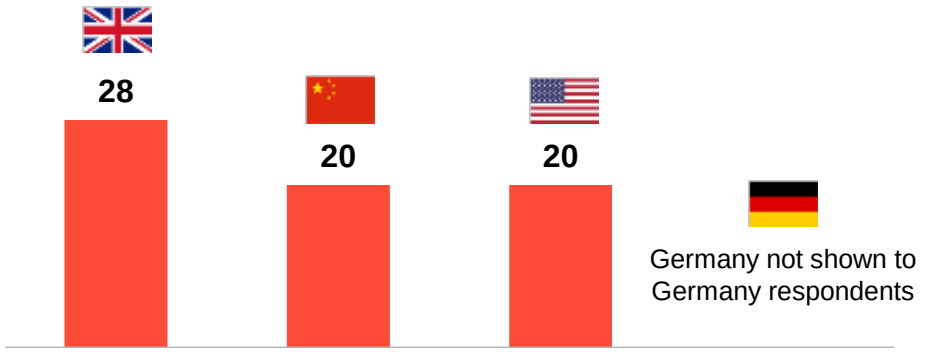

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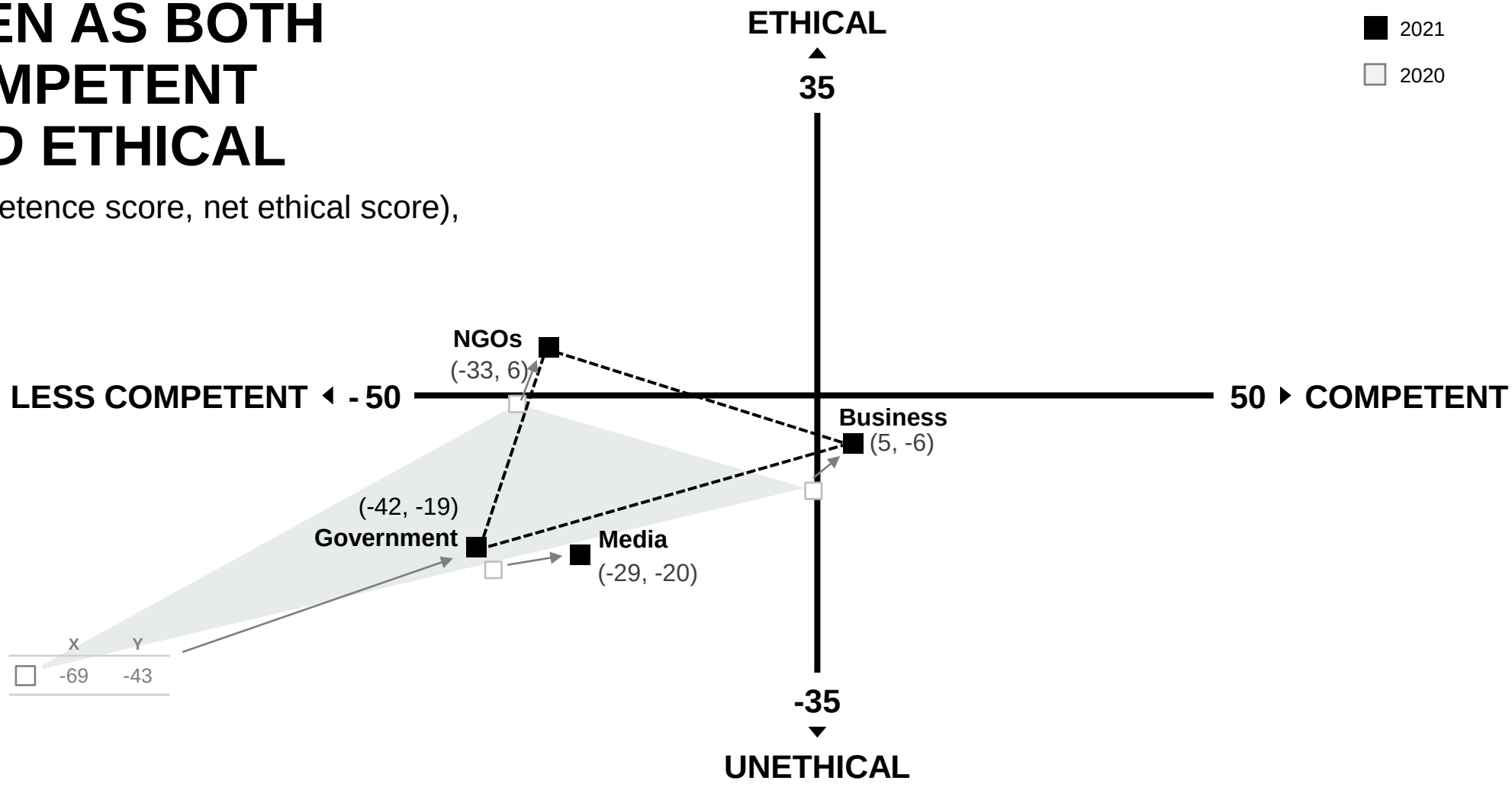
PANDEMIC FURTHER FUELS FEARS

NO INSTITUTION SEEN AS BOTH COMPETENT *AND* ETHICAL

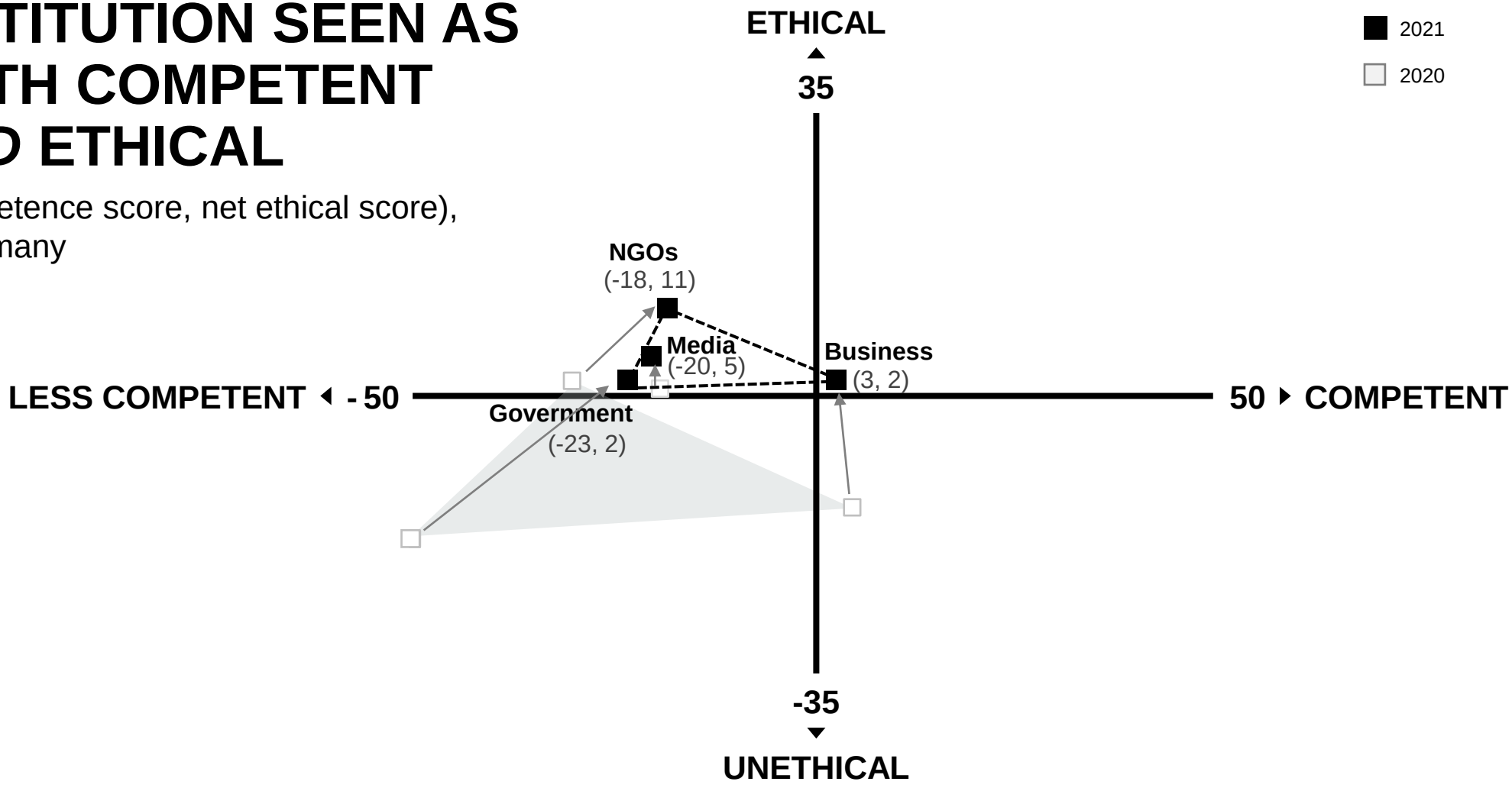
(Competence score, net ethical score), in Italy



2021 Edelman Trust Barometer. The ethical scores are averages of nets based on INS_PER_DIM/1-4. Question asked of half of the sample. The competence score is a net based on TRU_3D_INS/1. Depending on the question it was either asked of the full of half the sample. General population, Italy. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

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

(Competence score, net ethical score), in Germany



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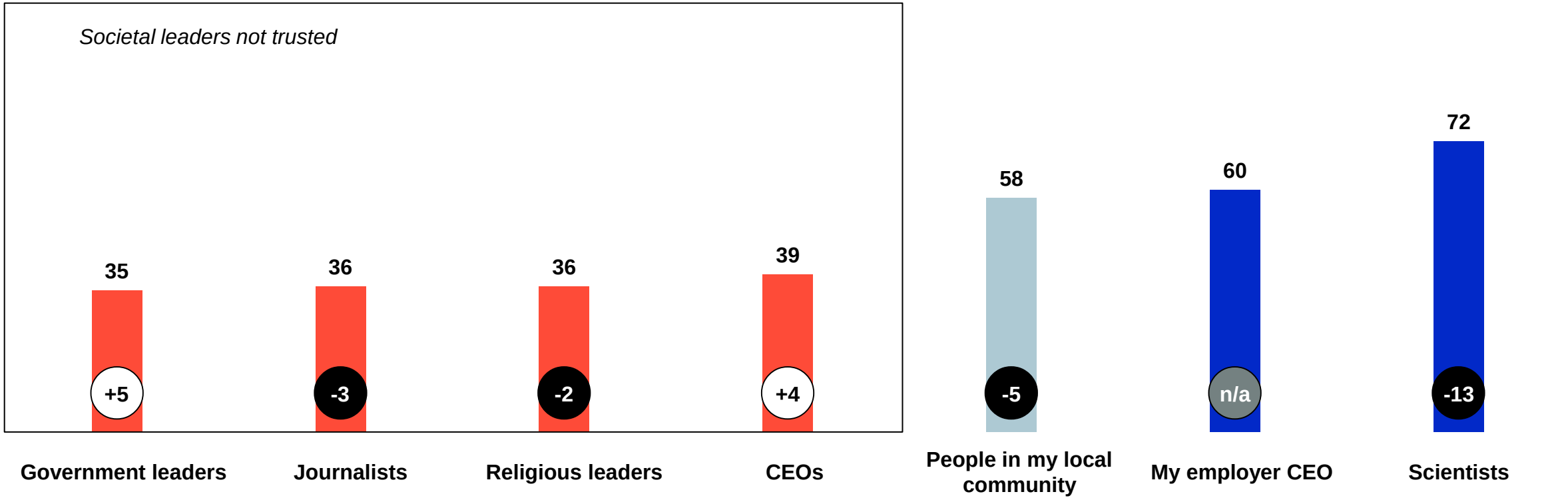
CRISIS OF LEADERSHIP

SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

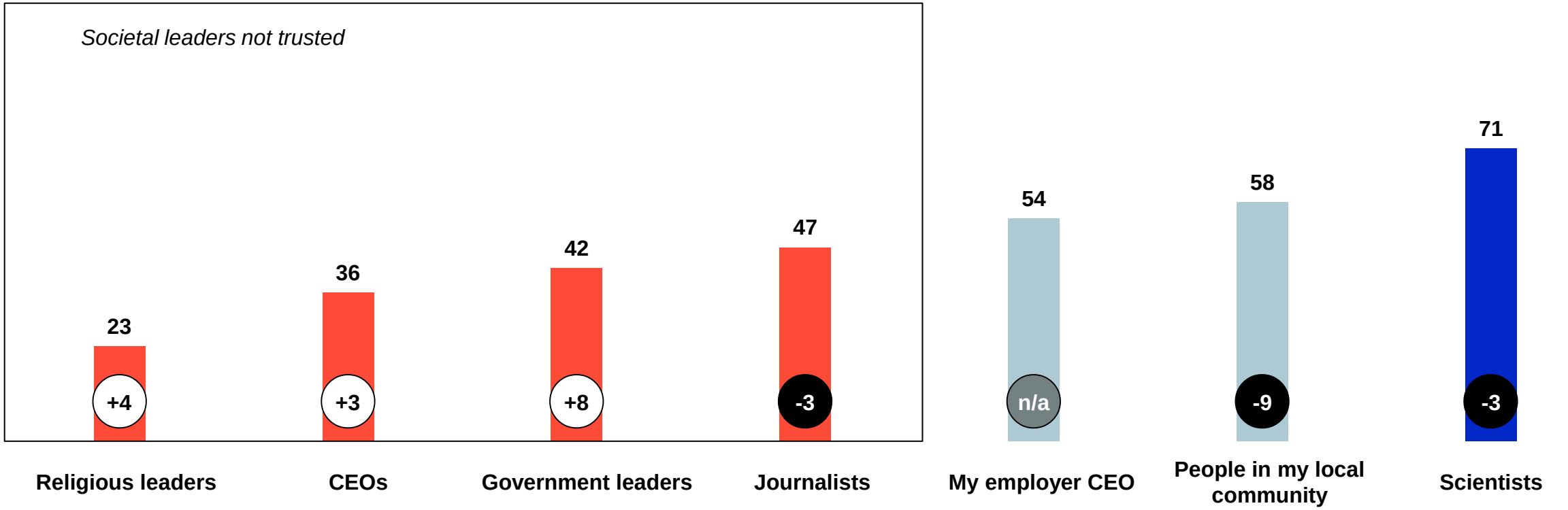
Percent trust, in Italy



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

SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust, in Germany



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SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Percent who worry, in Italy

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

64%

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

63%

2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Attributes shown to half of the sample. General population, Italy.

SOCIETAL LEADERS SUSPECTED OF LIES AND MISINFORMATION

Percent who worry, in Germany

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

38%

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

42%

2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Attributes shown to half of the sample. General population, Germany.

TRUST IS LOCAL:
MY EMPLOYER A MAINSTAY OF TRUST

Percent trust in my employer

Distrust | Neutral | Trust

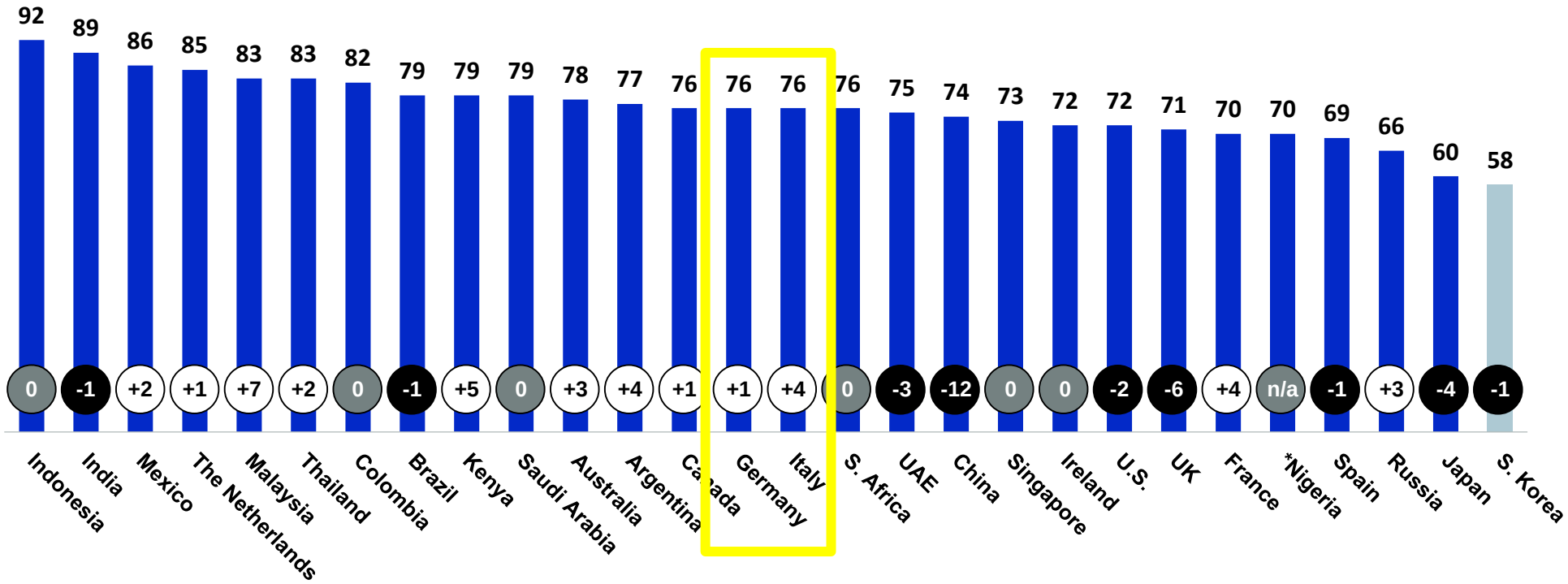
Change, 2020 to 2021

Italy

76
My employer

Business	59
Government	51
Media	50
NGOs	48

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

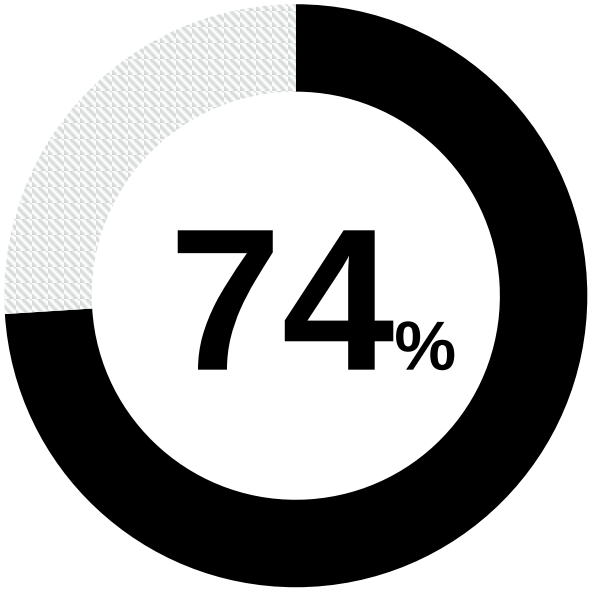


2021 Edelman Trust Barometer. TRU_INS. [Your employer] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, Italy. Question asked among those who are employed (Q43/1).

A NEW MANDATE FOR BUSINESS

CEOS MUST LEAD ON SOCIETAL ISSUES

Percent in Italy who expect **CEOs to publicly speak out** about one or more of these societal challenges

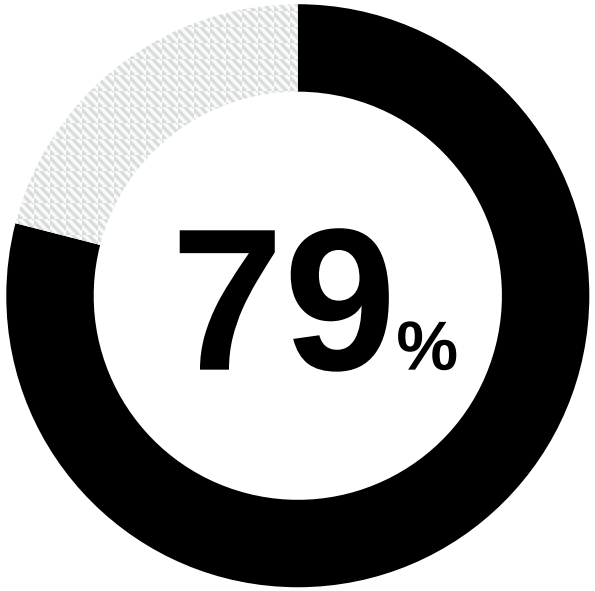


Pandemic impact	53
Job automation	31
Local community issues	27
Societal issues	24

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

CEOS MUST LEAD ON SOCIETAL ISSUES

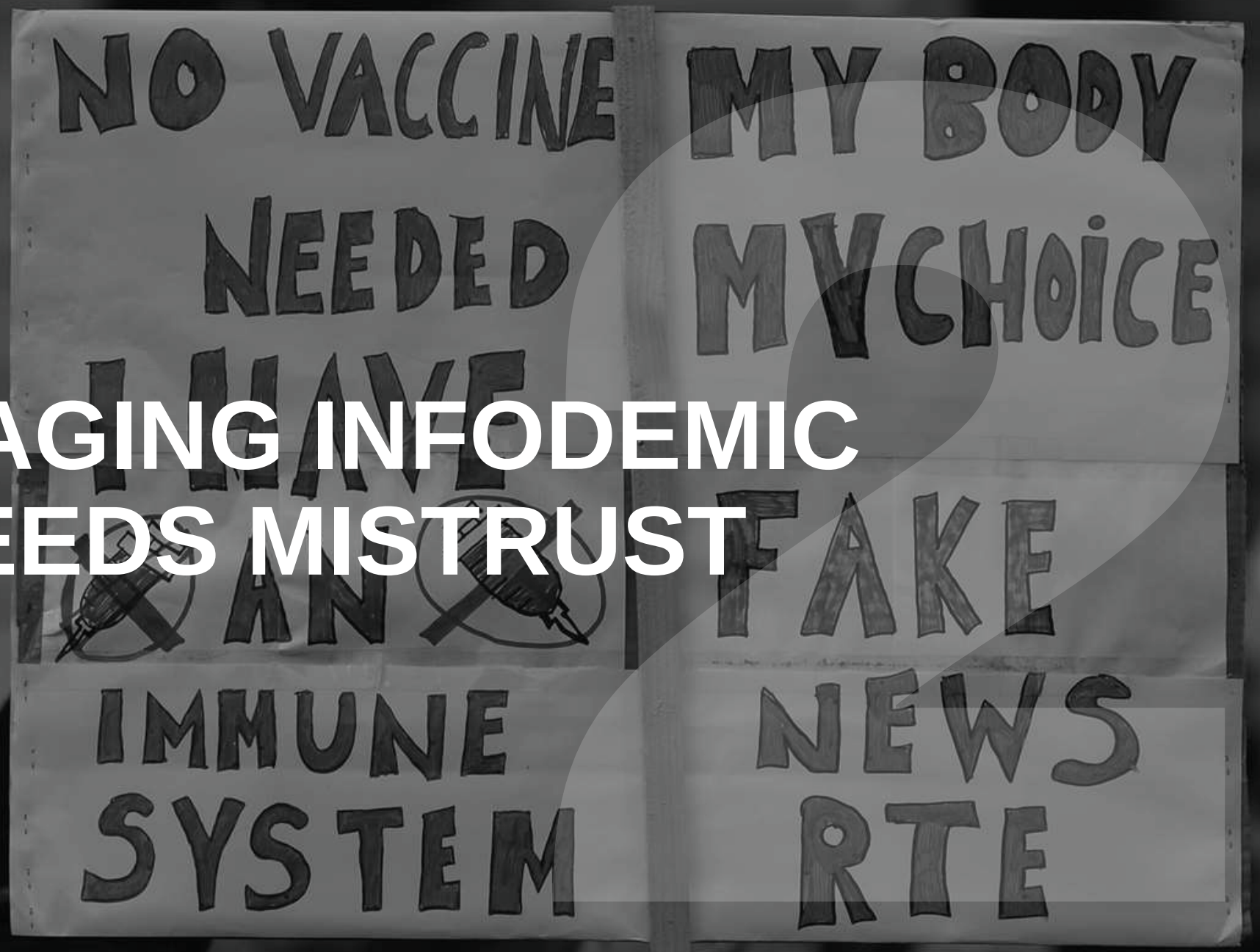
Percent in Germany who expect **CEOs to publicly speak out** about one or more of these societal challenges



Pandemic impact	51
Job automation	48
Societal issues	38
Local community issues	35

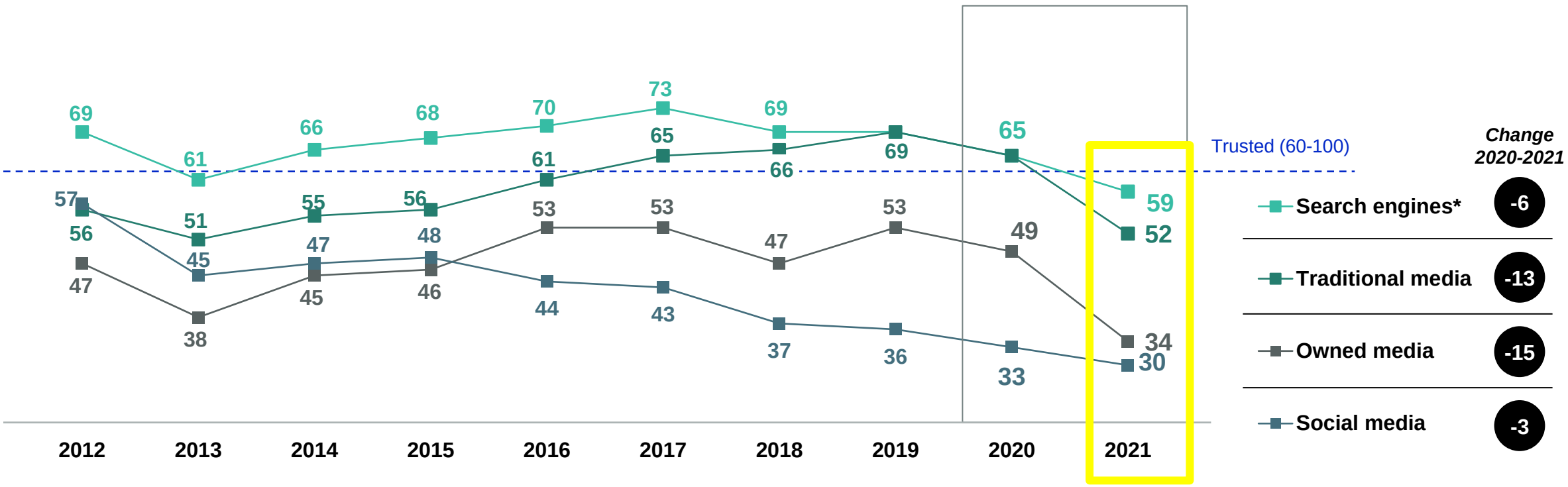
2021 Edelman Trust Barometer. CEO_SPEAK. Looking at the topics listed below, please select the ones you expect CEOs to currently be speaking out about publicly. Select all that apply. Question asked of half of the sample. General population, Germany. CEO expectation to speak out is a net of attributes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

RAGING INFODEMIC FEEDS MISTRUST



TRUST IN ALL INFORMATION SOURCES NEAR RECORD LOWS

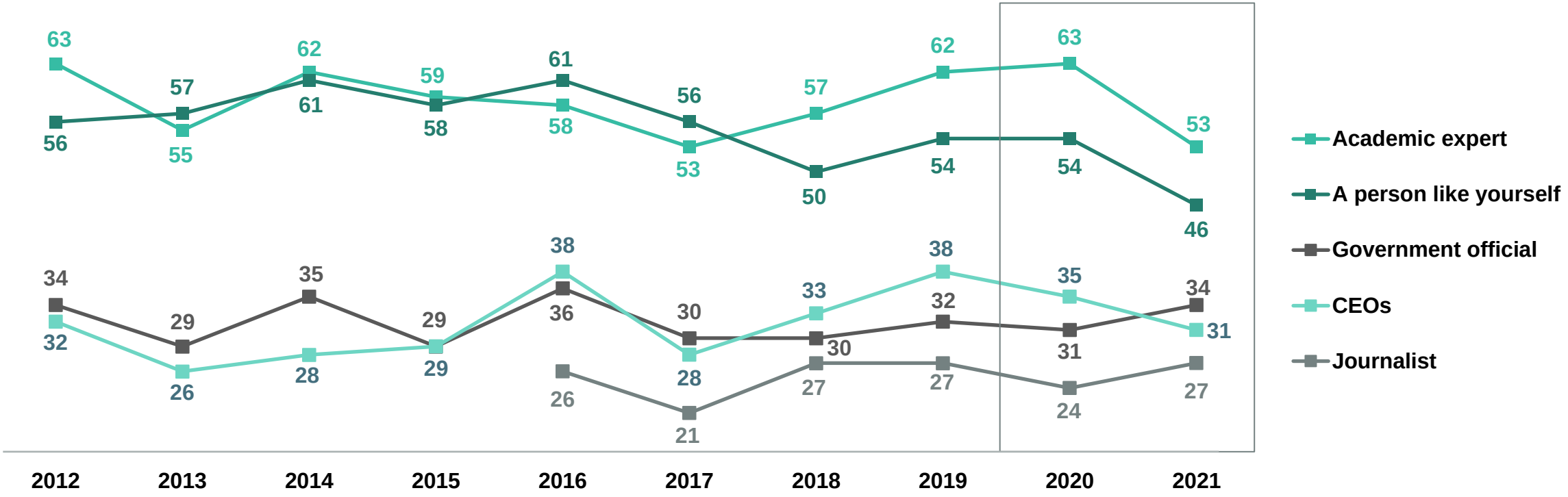
Percent trust in each source for general news and information, in Italy



2021 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Italy.
*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

SPOKESPEOPLE CREDIBILITY OVER TIME

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



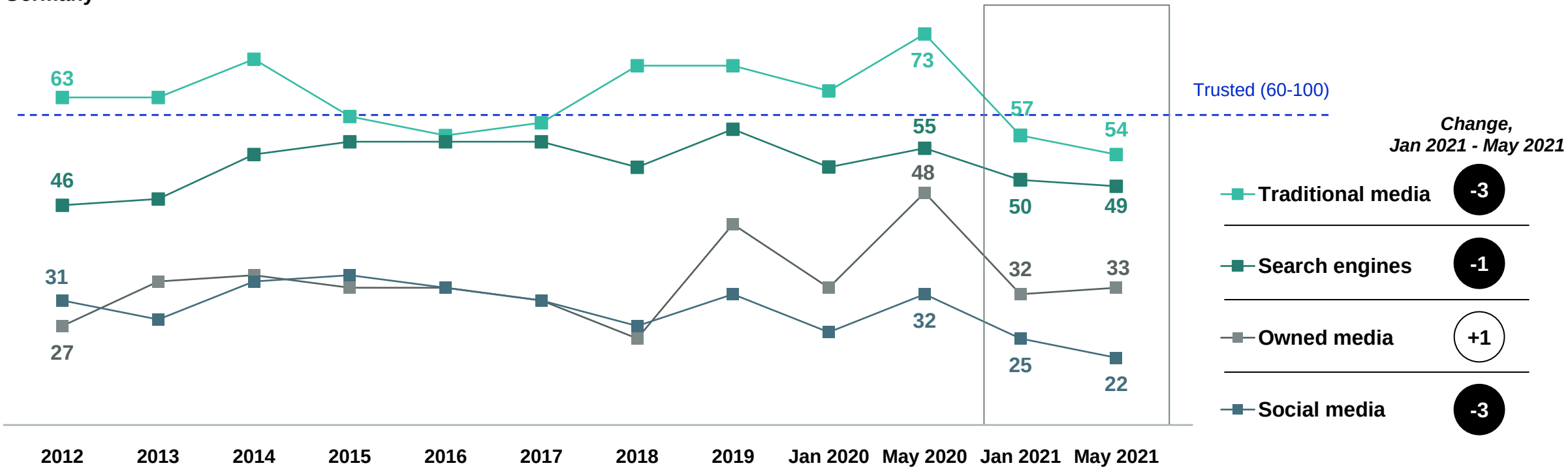
2021 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? 4-point scale; top 2 box, credible. Question asked of half of the sample. General population, Italy.

SOCIAL AND TRADITIONAL MEDIA AT ALL-TIME LOWS; ONLY OWNED MEDIA GAINS IN TRUST

Percent trust in each source for general news and information, in Germany

- 0 + Change, Jan 2021 to May 2021

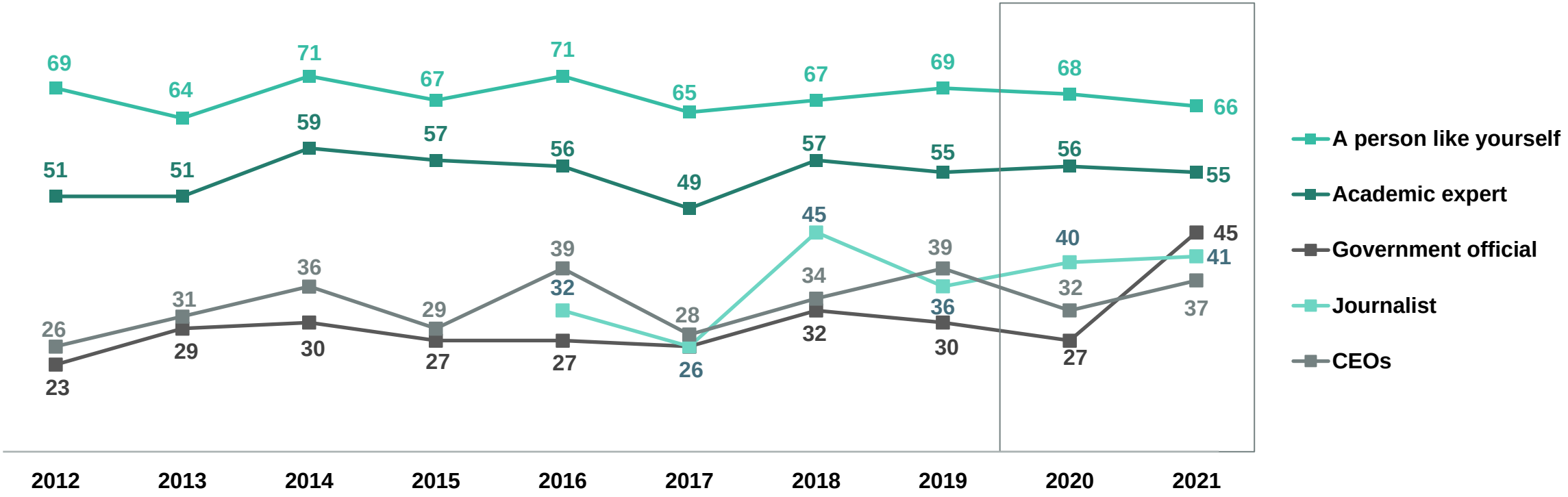
Germany



2021 Edelman Trust Barometer Spring Update: A World in Trauma. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Germany.
*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

SPOKESPEOPLE CREDIBILITY OVER TIME

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



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NEWS ORGANIZATIONS SEEN AS BIASED

Percent who agree, in Italy

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

69%

Most **news organizations** are more concerned with **supporting an ideology** or political position than with informing the public

71%

The media is **not** doing well at **being objective** and non-partisan

75%

2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Attributes shown to half of the sample. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. PER_MED. How well do you feel the media is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; bottom 3 box, not doing well. Question asked of half of the sample. General population, Italy.

NEWS ORGANIZATIONS SEEN AS BIASED

Percent who agree, in Germany

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

43%

Most **news organizations** are more concerned with **supporting an ideology** or political position than with informing the public

42%

The media is **not** doing well at **being objective** and non-partisan

59%

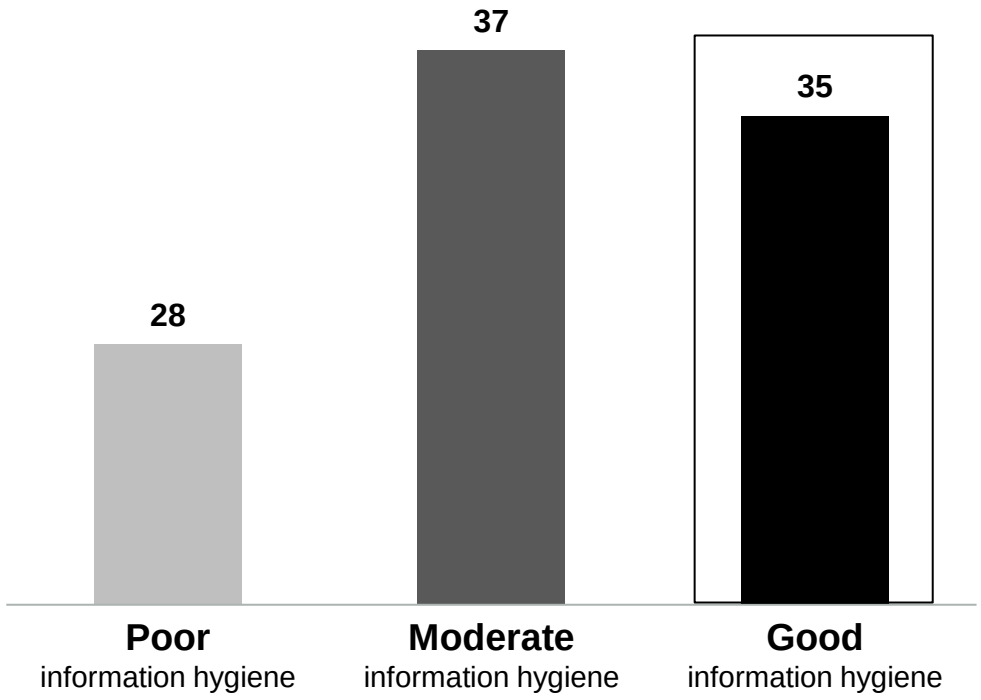
2021 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Attributes shown to half of the sample. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Question asked of half of the sample. PER_MED. How well do you feel the media is currently doing each of the following? Please indicate your answer using the 5-point scale below. 5-point scale; bottom 3 box, not doing well. Question asked of half of the sample. General population, Germany.

IN ITALY, ONLY 1 IN 3 HAVE GOOD INFORMATION HYGIENE

Information hygiene:

1. News engagement
2. Avoid information echo chambers
3. Verify information
4. Do not amplify unvetted information

Percent in each segment



67% of respondents **share or forward news items** that they find to be interesting.

Of those, **only 38%** have good information hygiene

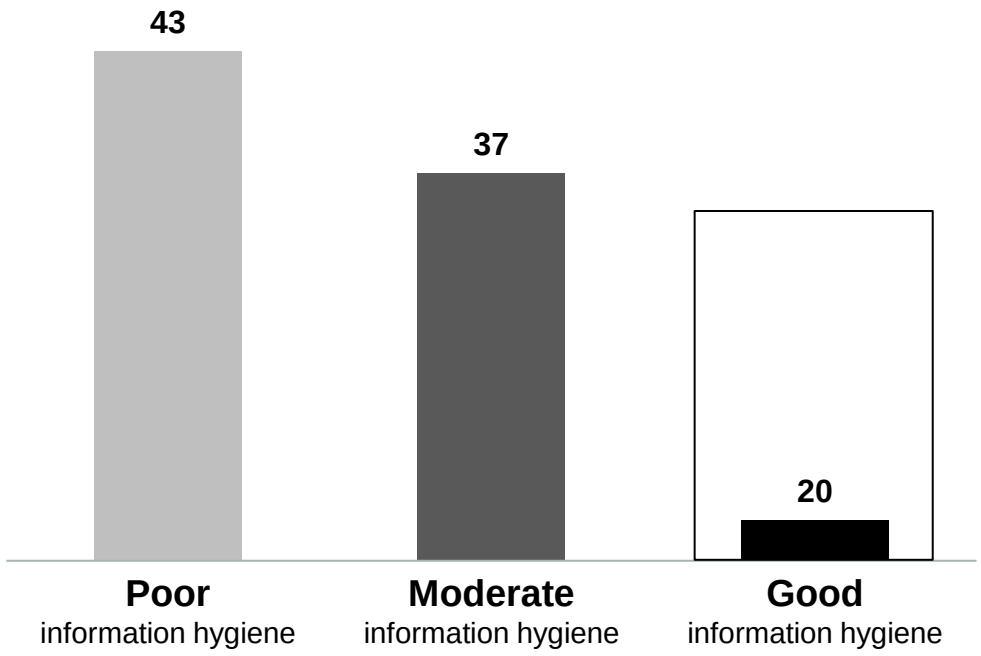
2021 Edelman Trust Barometer. MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. 7-point scale; top 5 box, several times a month or more. General population, Italy. For full details on how the Information Hygiene Scale was built, please refer to the Technical Appendix.

IN GERMANY, ONLY 1 IN 5 HAVE GOOD INFORMATION HYGIENE

Information hygiene:

1. News engagement
2. Avoid information echo chambers
3. Verify information
4. Do not amplify unvetted information

Percent in each segment



42% of respondents **share or forward news items** that they find to be interesting.

Of those, **only 20%** have good information hygiene

2021 Edelman Trust Barometer. MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. 7-point scale; top 5 box, several times a month or more. General population, Germany. For full details on how the Information Hygiene Scale was built, please refer to the Technical Appendix.

SECTORS’ CREDIBILITY

INDUSTRY SECTORS OVER TIME

Percent trust in each sector, in Italy

Distrust Neutral Trust | - 0 + Change, 2012 to 2021

Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend
Technology	79	72	78	77	78	79	78	78	70	69	-10
Healthcare	-	-	-	-	50	54	57	59	61	66	n/a
Food and beverage	67	59	63	64	64	64	62	65	62	65	-2
Consumer packaged goods	62	55	58	59	57	62	60	62	59	61	-1
Entertainment	-	58	66	66	64	65	66	68	64	59	n/a
Telecommunications	61	53	57	60	60	62	57	61	56	58	-3
Automotive	56	54	63	64	54	63	58	66	61	57	+1
Energy	58	49	54	56	56	59	62	62	57	54	-4
Financial services	32	26	32	36	40	41	43	41	41	42	+10

2021 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, Italy.

INDUSTRY SECTORS OVER TIME

Percent trust in each sector, in Germany

Distrust | Neutral | Trust

Change, 2012 to 2021: - | 0 | +

Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	10yr. Trend
Healthcare	-	-	-	-	56	57	57	62	58	64	n/a
Technology	58	60	62	61	63	63	64	68	64	60	+2
Food and beverage	49	56	59	55	57	60	56	57	57	57	+8
Consumer packaged goods	39	50	48	46	50	54	45	47	46	54	+15
Telecommunications	43	53	48	50	50	53	57	56	54	54	+11
Energy	30	37	36	40	44	51	50	50	51	50	+20
Entertainment	-	57	60	57	59	58	56	57	56	49	n/a
Automotive	51	58	62	61	41	48	35	36	42	44	-7
Financial services	17	28	23	25	32	35	38	38	40	41	+24

In Germany., trust in financial services at an all time high

2021 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, Germany.