

Trust in
Argentina



Edelman Trust Barometer 2020



20th ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 markets

34,000+ respondents total

All fieldwork was conducted between
October 19 and November 18, 2019

28-market global data margin of error: General population +/- 0.6% (N=32,200), informed public +/- 1.2% (N=6,200), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8% (N=16,100).

Market-specific data margin of error: General population +/- 2.9% (N=1,150), informed public +/- 6.9% (N = min 200, varies by market), China and U.S. +/- 4.4% (N=500), mass population +/- 3.0% to 3.6% (N =min 736, varies by market).

Gen Z MOE: 28-market = +/- 1.5% (N=4,310)

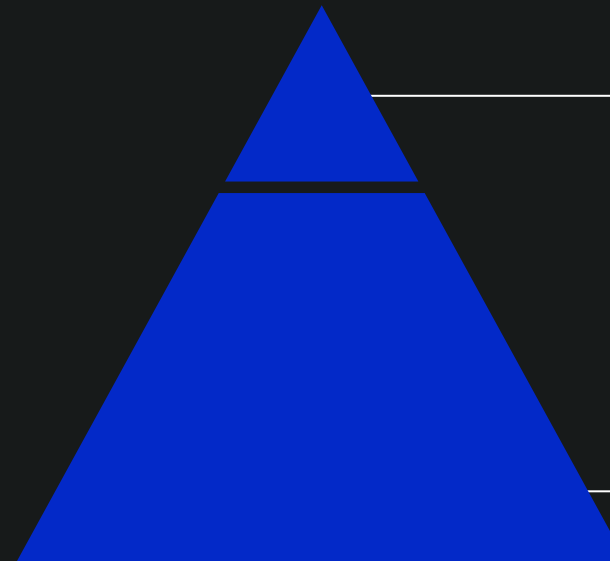
Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

General Online Population

1,150
respondents
per market

Ages
18+

All slides show general
online population data
unless otherwise noted



2020 Gen Z oversample

250 respondents age 18-24 per market



Informed Public

500 respondents in U.S. and China;
200 in all other markets

Represents **17%** of total global population

Must meet 4 criteria

- ▶ Ages **25-64**
- ▶ College-educated
- ▶ In top **25%** of household income per age group in each market
- ▶ Report significant media consumption and engagement in public policy and business news



Mass Population

All population not
including informed public

Represents **83%** of total
global population

TRUST ESSENTIAL FOR FUTURE SUCCESS

20 years of Edelman
research on trust



- 2M+ respondents
- 400+ companies
- 80k employee reviews
- Interviews with 50+ business leaders
- 23M measures of trust
- Review of 150+ academic articles and 80+ models of trust
- Trust and stock price analysis for 80 companies



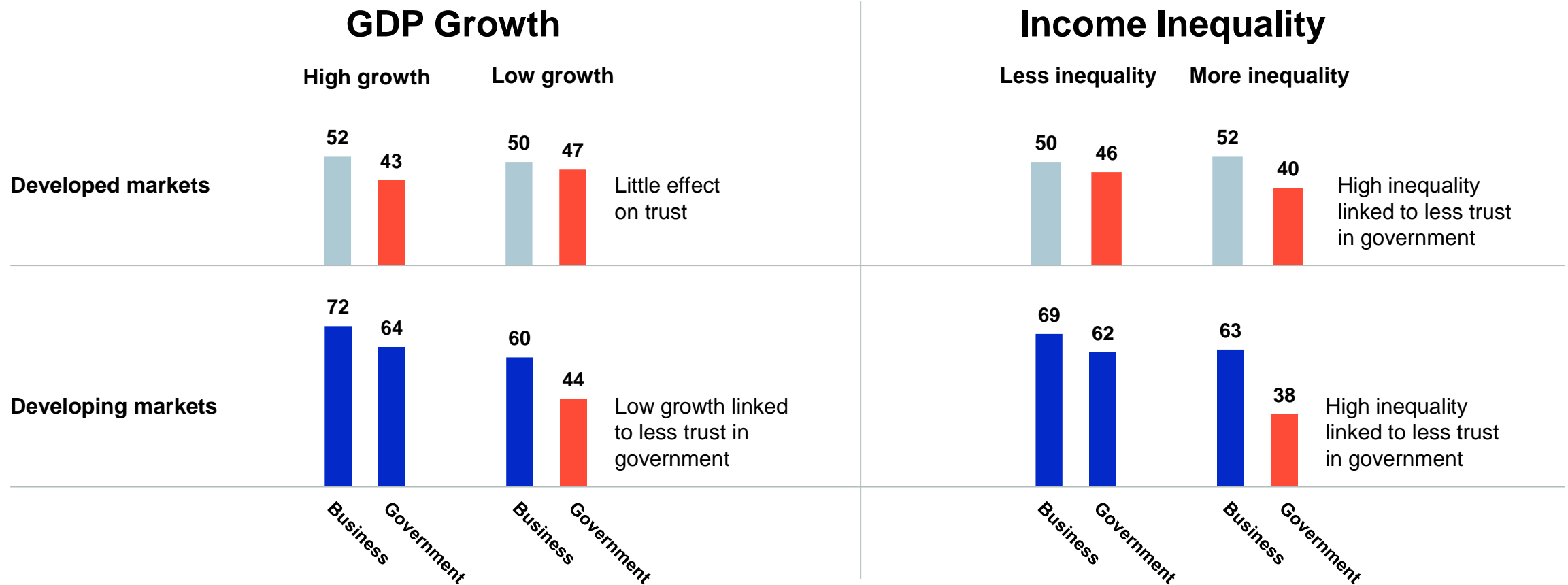
20 YEARS OF TRUST

| 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---------------------------|---|--|--|---|---|--|----------------------------|---|
| 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 |
| 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| Business Must Partner With Government to Regain Trust | 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 |

INCOME INEQUALITY NOW AFFECTS TRUST MORE THAN ECONOMIC GROWTH



Percent trust



2020 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 online population, 23-mkt avg., by developed and developing markets. High-growth economies are those with a Q2 2019 GDP of 1.4% or higher. Developing market high-growth economies: China, Colombia, India, Indonesia, Kenya, Malaysia, UAE; low growth economies: Argentina, Brazil, Mexico, Russia, Saudi Arabia, S. Africa, Thailand. Developed market high-growth economies: Australia, Canada, France, Ireland, The Netherlands, Spain, U.S.; low-growth economies: Germany, Hong Kong, Japan, Italy, Singapore, S. Korea, U.K.



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GROWING SENSE OF INEQUITY

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CONTINUED DISTRUST

Trust Index

Global Trust Index increases 1 pt., with increases in 16 of 26 markets measured

12 of 26 markets are distrusters, down 2 from 2019

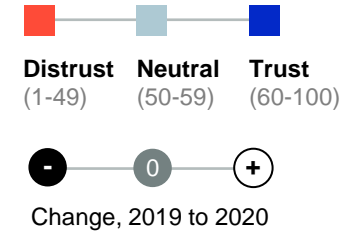
2020 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 26-mkt avg.

2019 General population

| | |
|----|-----------------|
| 53 | Global 26 |
| 79 | China |
| 73 | Indonesia |
| 72 | India |
| 71 | UAE |
| 70 | Saudi Arabia |
| 62 | Singapore |
| 59 | Malaysia |
| 58 | Mexico |
| 56 | Canada |
| 55 | Hong Kong |
| 54 | The Netherlands |
| 52 | Colombia |
| 49 | U.S. |
| 48 | Australia |
| 46 | Argentina |
| 46 | Brazil |
| 46 | Italy |
| 46 | S. Korea |
| 45 | S. Africa |
| 44 | France |
| 44 | Germany |
| 43 | U.K. |
| 42 | Ireland |
| 40 | Spain |
| 39 | Japan |
| 29 | Russia |

2020 General population

| | |
|----|-----------------|
| 54 | Global 26 |
| 82 | China |
| 79 | India |
| 73 | Indonesia |
| 65 | UAE |
| 62 | Mexico |
| 62 | Singapore |
| 61 | Saudi Arabia |
| 60 | Malaysia |
| 57 | The Netherlands |
| 53 | Canada |
| 53 | Colombia |
| 51 | Brazil |
| 50 | Hong Kong |
| 50 | S. Korea |
| 49 | Argentina |
| 49 | Italy |
| 47 | Australia |
| 47 | U.S. |
| 46 | Germany |
| 45 | France |
| 45 | Ireland |
| 45 | Spain |
| 44 | S. Africa |
| 42 | Japan |
| 42 | U.K. |
| 30 | Russia |



Declines in

| | |
|--------------|----|
| Saudi Arabia | -9 |
| UAE | -6 |
| Hong Kong | -5 |
| Canada | -3 |
| U.S. | -2 |
| Australia | -1 |
| S. Africa | -1 |
| U.K. | -1 |

TRUST INEQUALITY SETS NEW RECORDS

Trust Index

Mass population 14 points less trusting

23 markets with double-digit trust gaps

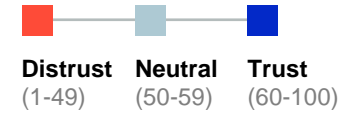
2020 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, 28-mkt avg.

2020 Informed public

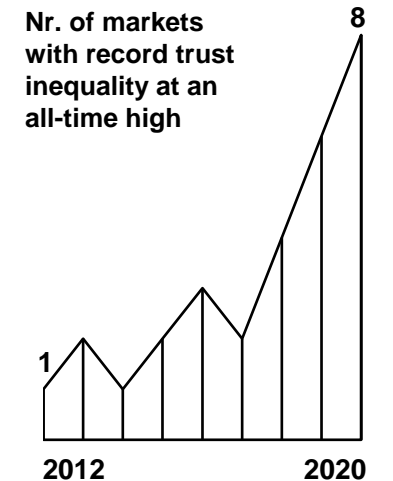
| | |
|-----------|------------------|
| 65 | Global 28 |
| 90 | China |
| 87 | India |
| 82 | Indonesia |
| 80 | Saudi Arabia |
| 78 | Thailand |
| 75 | UAE |
| 71 | Mexico |
| 71 | Singapore |
| 68 | Australia |
| 68 | Malaysia |
| 67 | Canada |
| 67 | The Netherlands |
| 64 | Germany |
| 64 | Italy |
| 63 | France |
| 62 | Colombia |
| 60 | Argentina |
| 60 | Brazil |
| 60 | Ireland |
| 59 | Spain |
| 58 | Kenya |
| 57 | U.K. |
| 54 | Hong Kong |
| 53 | Japan |
| 53 | U.S. |
| 50 | S. Korea |
| 49 | S. Africa |
| 41 | Russia |

2020 Mass population | Trust gap

| | | |
|-----------|------------------|-----------|
| 51 | Global 28 | 14 |
| 77 | China | 13 |
| 74 | India | 13 |
| 70 | Indonesia | 12 |
| 64 | UAE | 11 |
| 62 | Thailand | 16 |
| 60 | Singapore | 11 |
| 59 | Saudi Arabia | 21 |
| 58 | Malaysia | 10 |
| 58 | Mexico | 13 |
| 57 | The Netherlands | 10 |
| 56 | Kenya | 2 |
| 52 | Colombia | 10 |
| 51 | Canada | 16 |
| 49 | Brazil | 11 |
| 49 | Hong Kong | 5 |
| 49 | S. Korea | 1 |
| 48 | Argentina | 12 |
| 48 | Italy | 16 |
| 45 | Australia | 23 |
| 45 | U.S. | 8 |
| 44 | Germany | 20 |
| 44 | S. Africa | 5 |
| 43 | Ireland | 17 |
| 42 | France | 21 |
| 42 | Japan | 11 |
| 42 | Spain | 17 |
| 39 | U.K. | 18 |
| 27 | Russia | 14 |

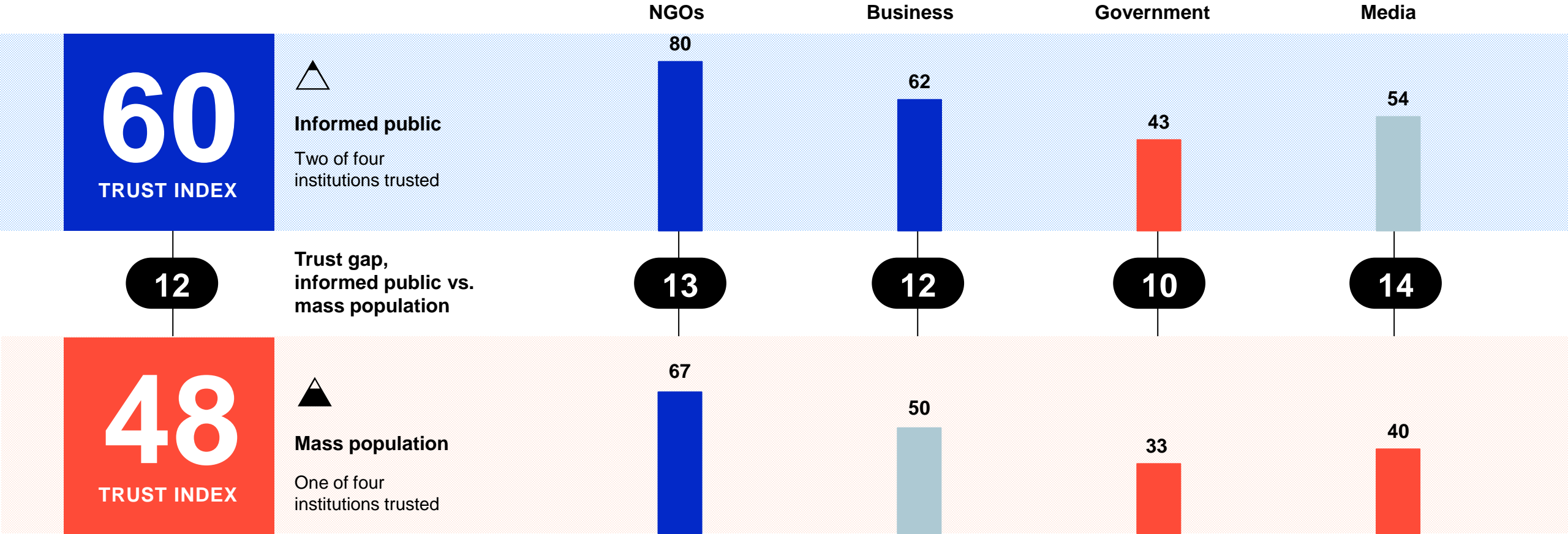


Record trust inequality



TWO DIFFERENT TRUST REALITIES

Percent trust in Argentina



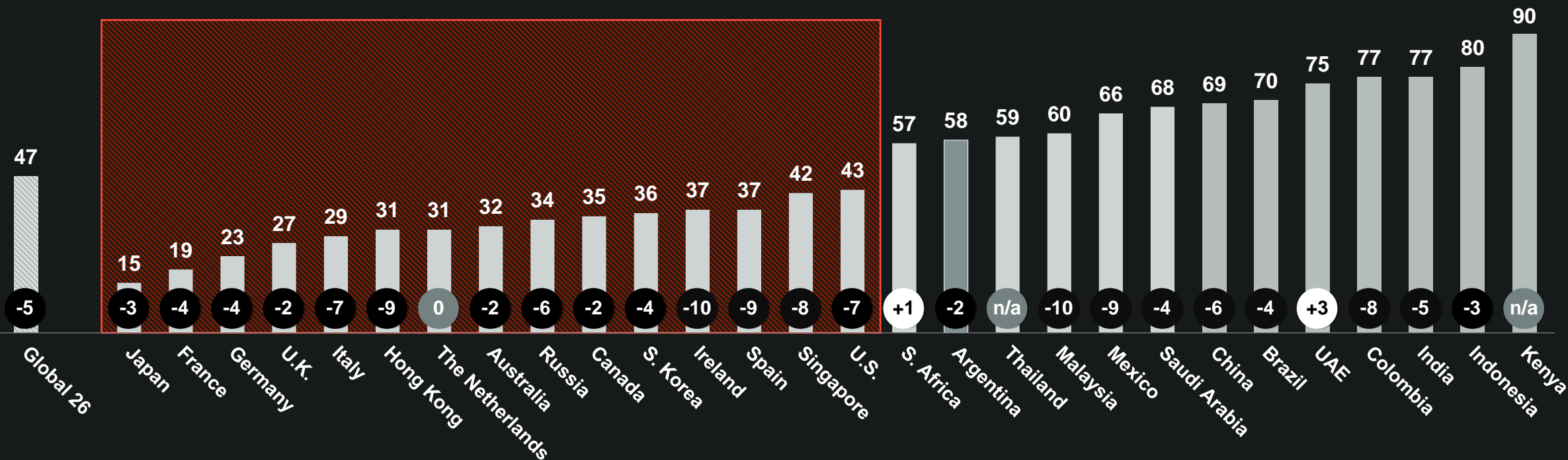
2020 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, Argentina.

PESSIMISTIC ABOUT ECONOMIC PROSPECTS

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

Legend: - 0 + Change, 2019 to 2020

Majority pessimistic in 15 of 28 markets

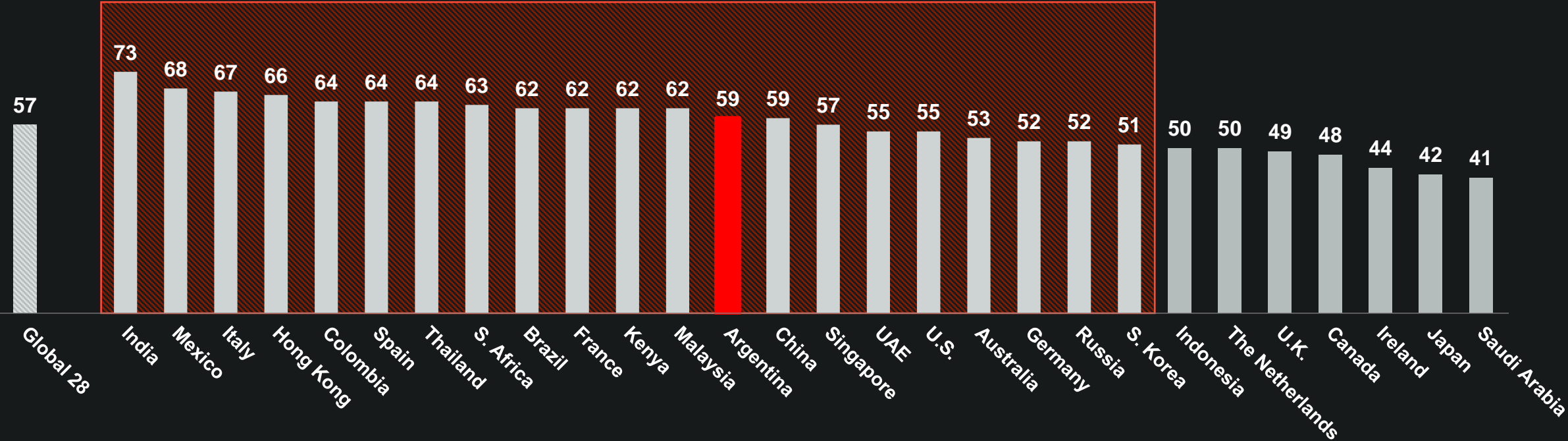


FEAR BEING LEFT BEHIND

Percent who are worried

I worry about people like me **losing the respect and dignity** I once enjoyed in this country

Majority share concern in 21 of 28 markets



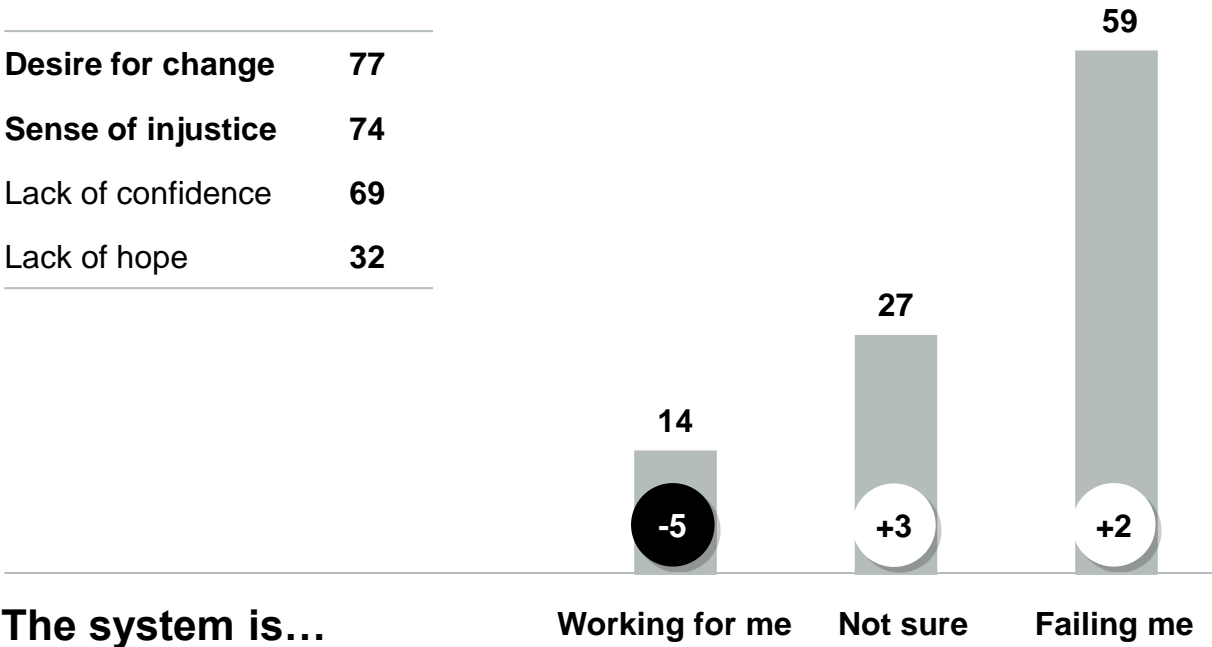
CAPITALISM UNDER FIRE

Percent in Argentina who agree



How true is this for you?

| | |
|--------------------|----|
| Desire for change | 77 |
| Sense of injustice | 74 |
| Lack of confidence | 69 |
| Lack of hope | 32 |



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

⊥
51%

2020 Edelman Trust Barometer. “System failing” measure. For full details on how the “system failing” measure was calculated, please refer to the Technical Appendix. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is. 9-point scale; top 4 box, true. General population, Argentina. Sense of injustice is an average of POP_MDC/1,2,3,8; Desire for change is POP_MDC/9; Lack of confidence is POP_MDC/10; Lack of hope is an average of POP_MDC/18,19,20 [reverse scored]. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Argentina.

⊥

UNPREPARED FOR THE FUTURE

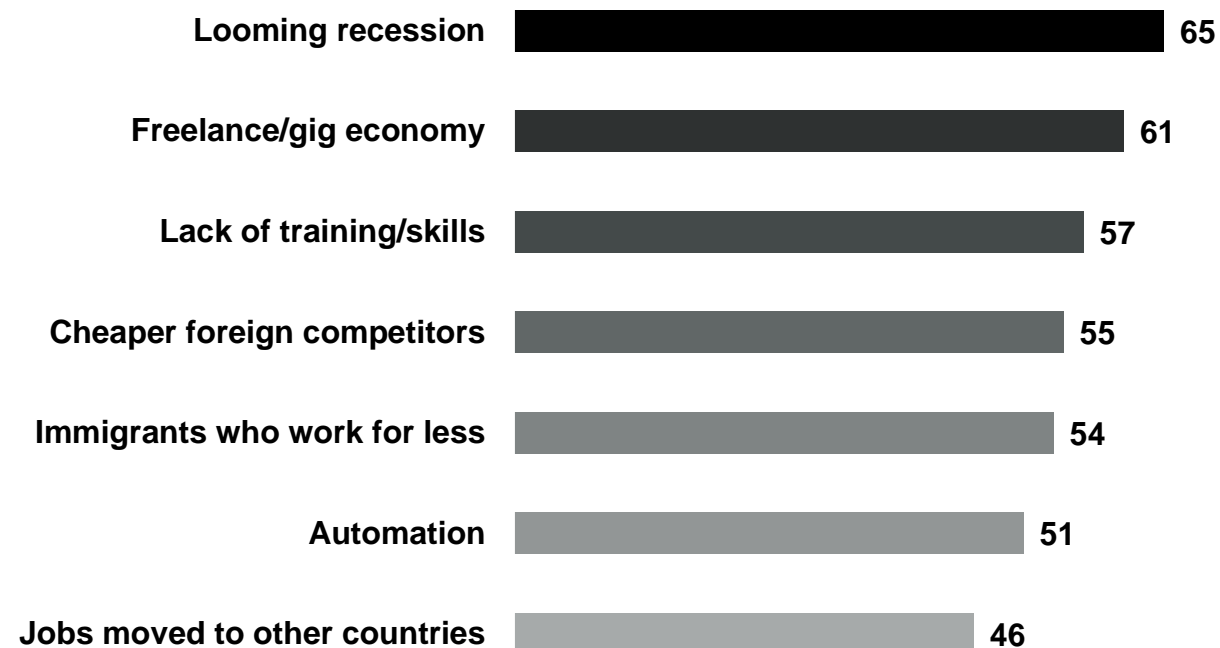
⊥

WORRY ABOUT THE FUTURE OF WORK

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

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

⊥
87%



WORRY TECHNOLOGY IS OUT OF CONTROL

Percent in Argentina 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

⊥
60%

⊥
65%

⊥
57%

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. Argentina. 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. Argentina. 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). Argentina. 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 ABOUT QUALITY INFORMATION

Percent in Argentina who agree

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

⊥
62%

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

⊥
77%
-2 pts
Change,
2018 to 2020

SOCIETAL LEADERS NOT TRUSTED TO ADDRESS CHALLENGES

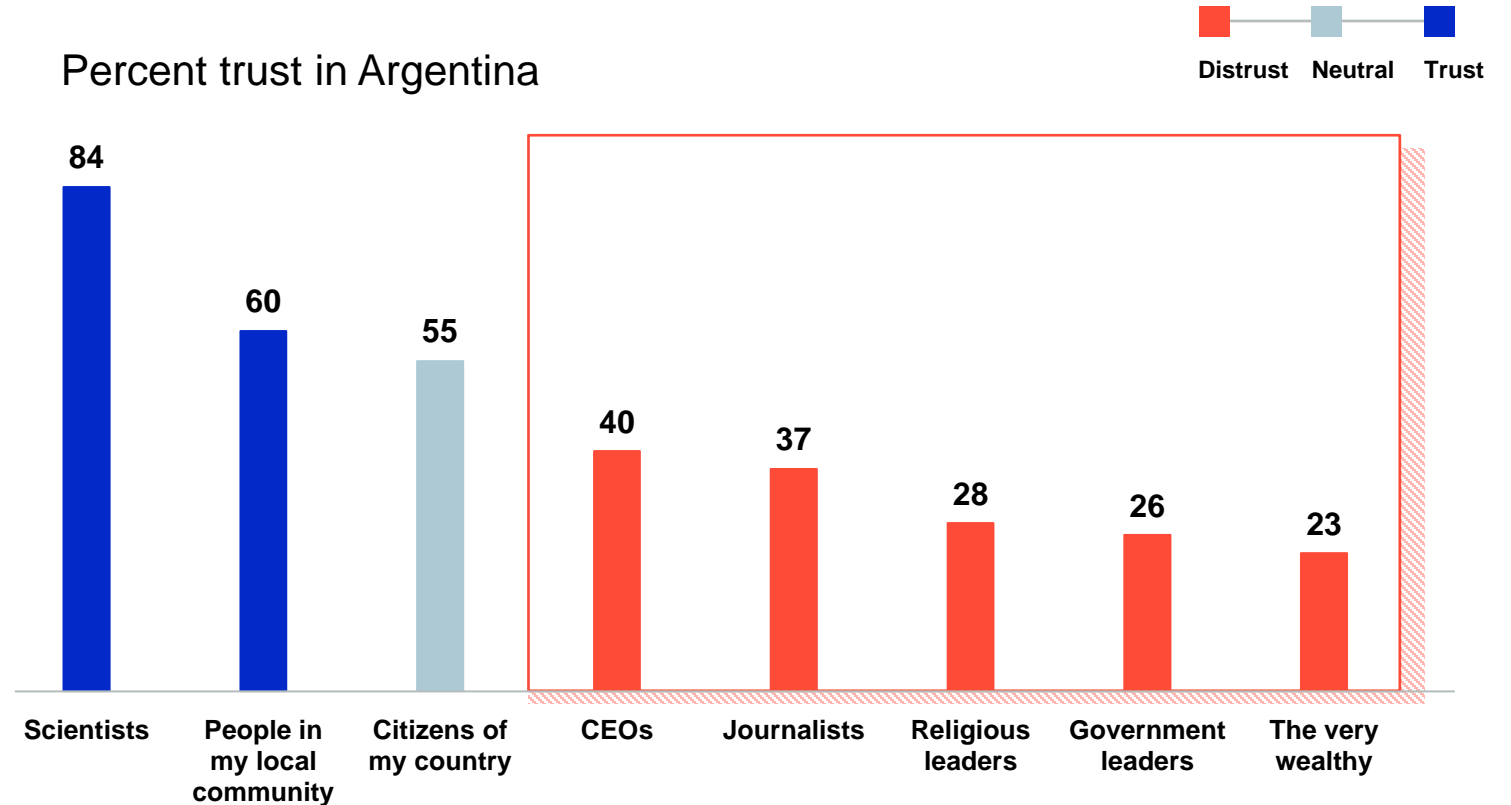
“

I do not have confidence that our current leaders will be able to successfully **address our country's challenges**

”

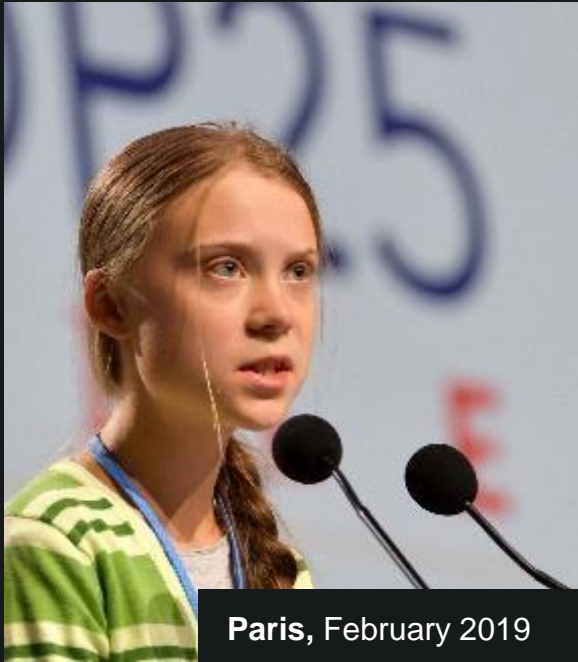
69%

Percent trust in Argentina



TAKING THE FUTURE INTO THEIR OWN HANDS

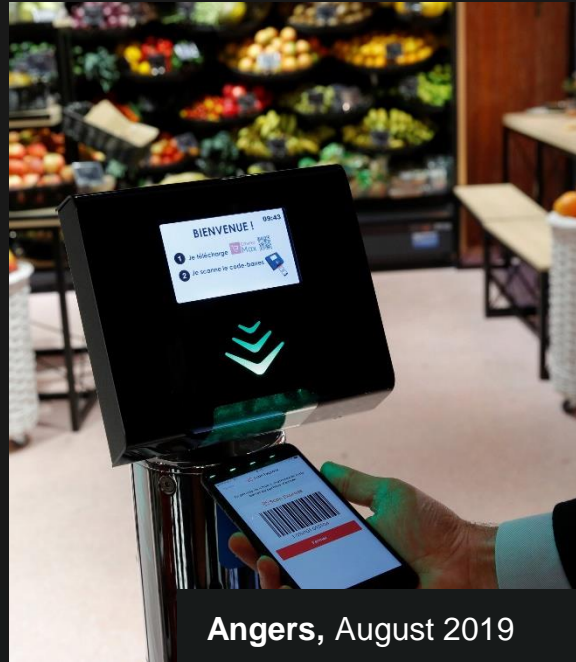
Climate Change



Paris, February 2019

Students protest to draw attention to climate change

Automation



Angers, August 2019

Unions protest a Géant automated supermarket

Income Inequality



London, November 2019

McDonald's employees protest for higher wages

#MeToo



Oregon, December 2019

Nike employees protest company's treatment of women



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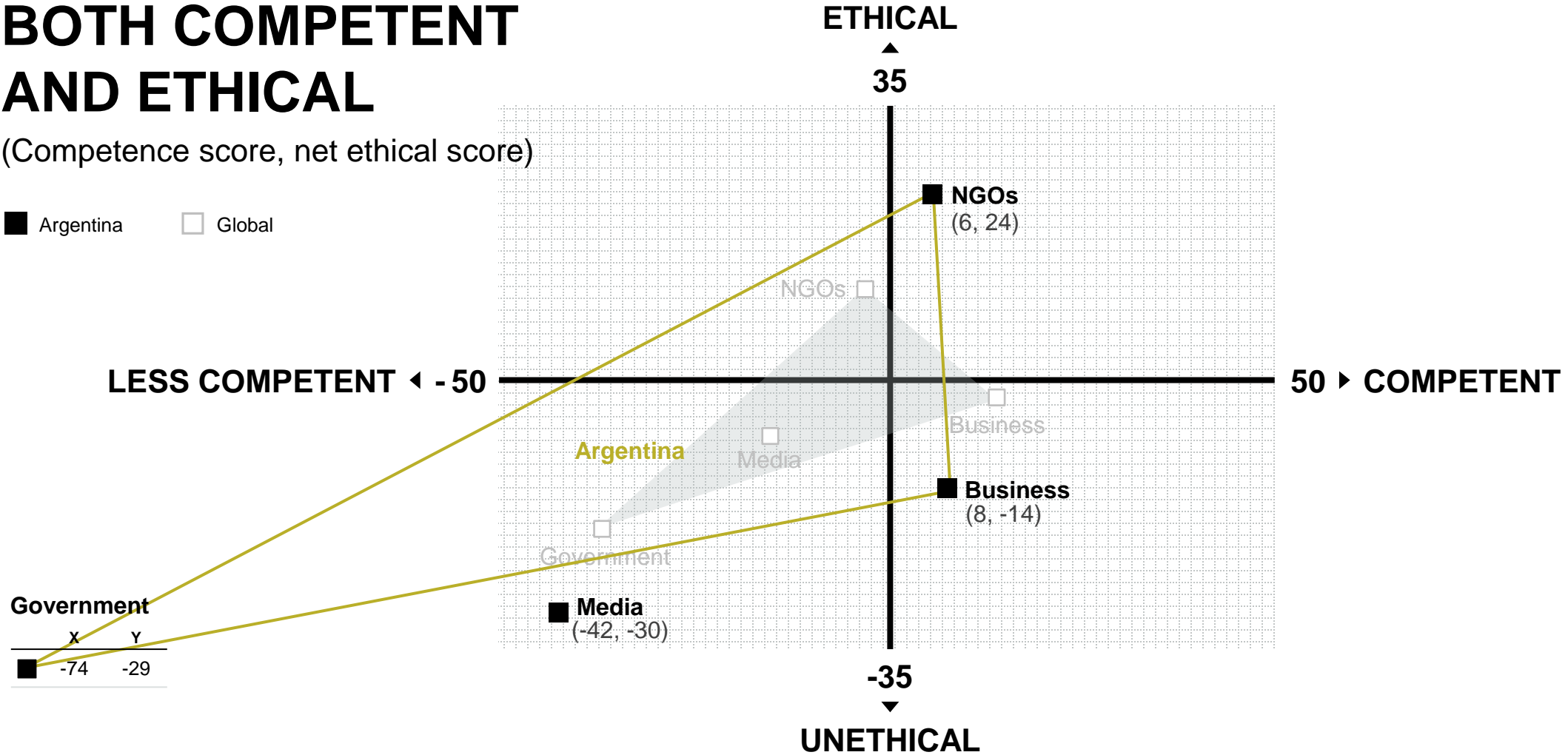
TRUST IS BUILT ON COMPETENCE AND ETHICS

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NGOS SEEN AS BOTH COMPETENT AND ETHICAL

(Competence score, net ethical score)

■ Argentina □ Global

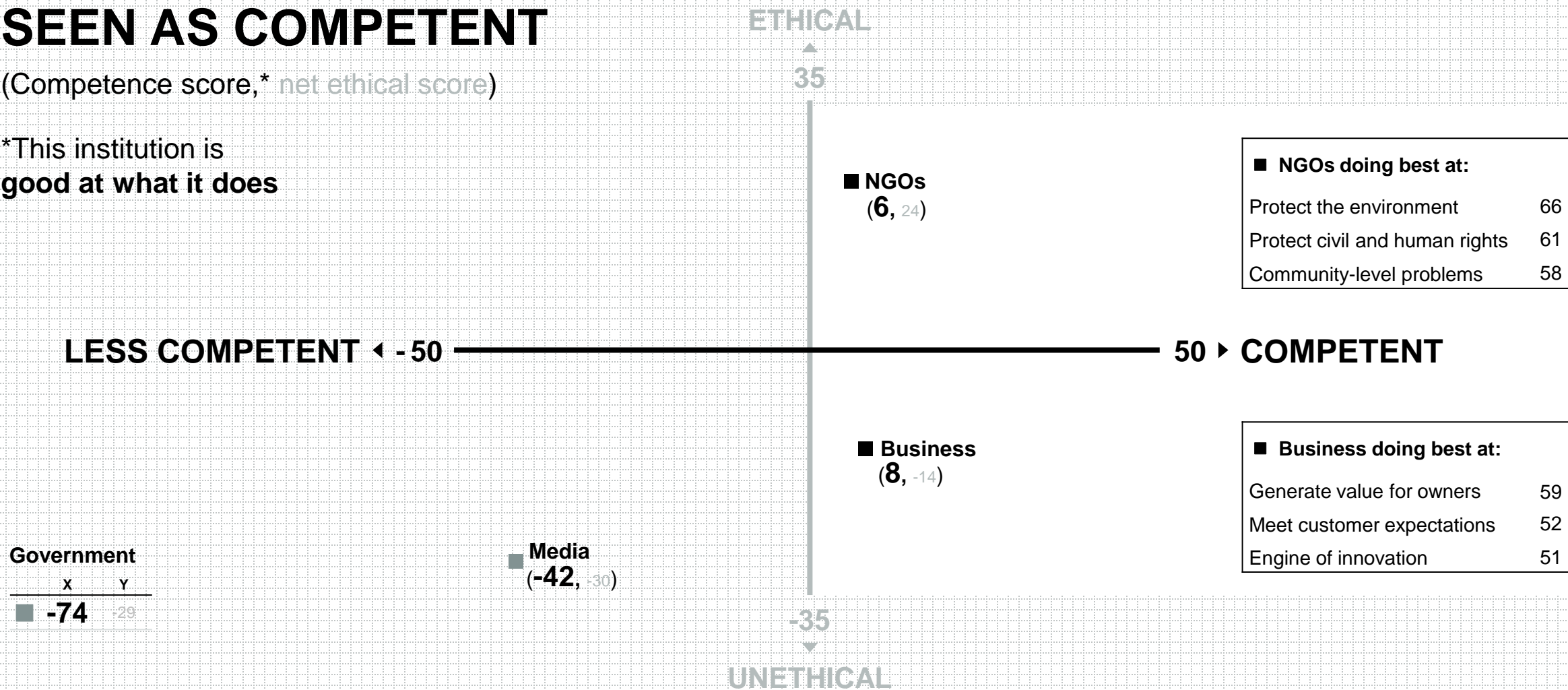


2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INSTITUTION] r1. Depending on the question it was either asked of the full or half the sample. General population, 25-mkt avg and Argentina. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

NGOS AND BUSINESS SEEN AS COMPETENT

(Competence score,* net ethical score)

*This institution is
good at what it does



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. PER_[INSTITUTION]: How well do you feel [institution] is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of half of the sample. General population, Argentina. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

ONLY NGOS SEEN AS ETHICAL

(Competence score, net ethical score*)

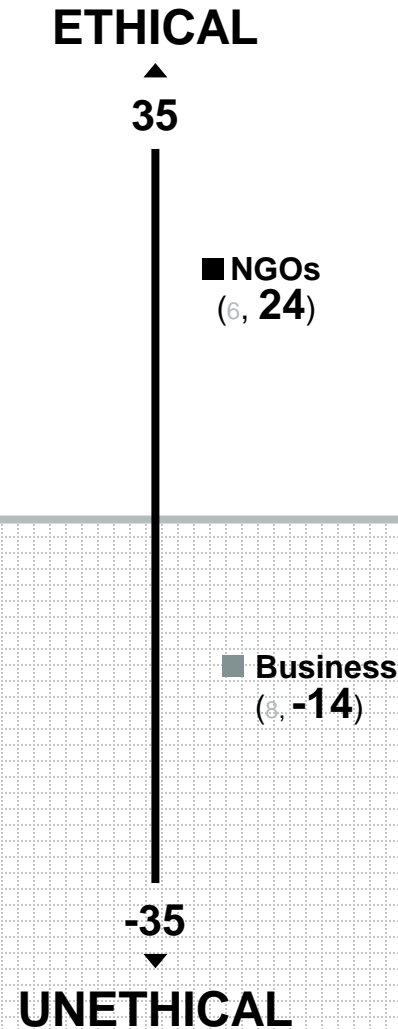
*This institution...

- Is **purpose driven**
- Is **honest**
- Has **vision**
- Is **fair**

Government

| | X | Y |
|---|-----|-----|
| ■ | -74 | -29 |

■ Media
(-42, -30)



■ NGOs doing best at:

| | |
|--------------------------------|----|
| Protect the environment | 66 |
| Protect civil and human rights | 61 |
| Community-level problems | 58 |

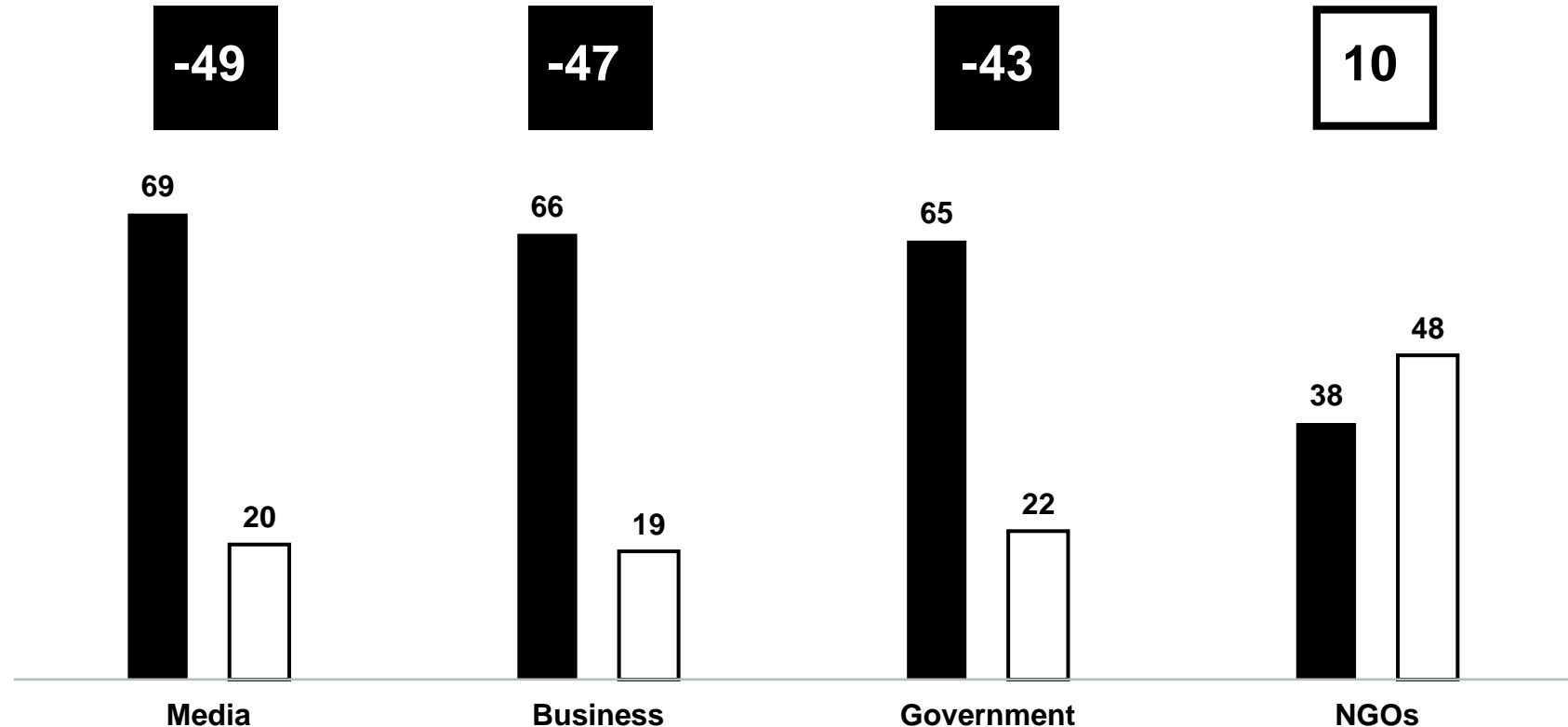
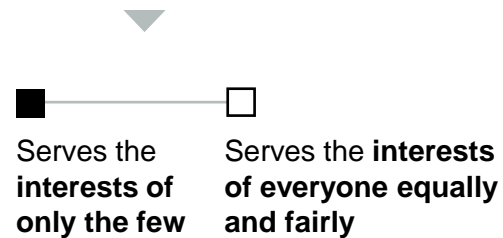
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ONLY NGOs SEEN AS FAIR

Percent in Argentina who cite each as a reason they trust or distrust each institution

This institution...

- Is purpose-driven
- Is honest
- Has vision
- **Is fair**



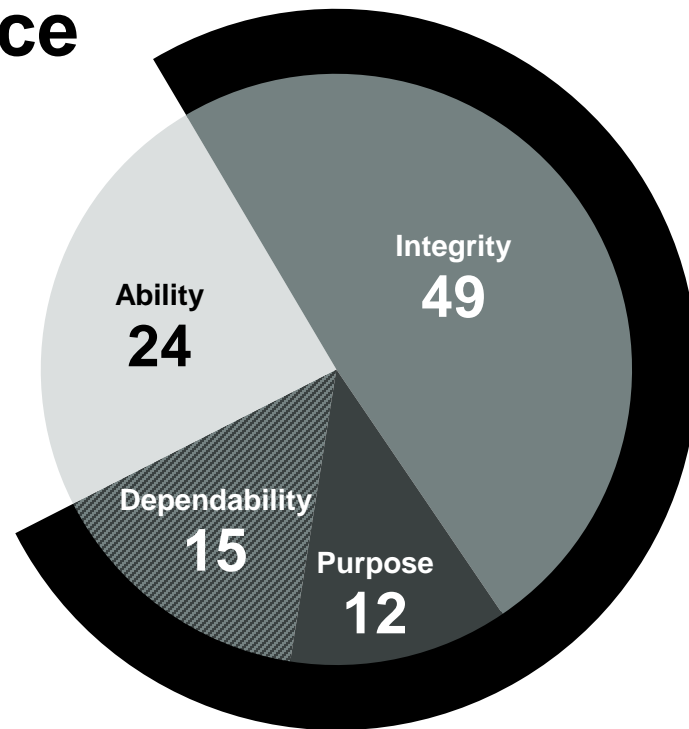
2020 Edelman Trust Barometer. Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive; bottom 5 box, negative. Question asked of half of the sample. General population, Argentina.

ETHICAL DRIVERS 3X MORE IMPORTANT TO COMPANY TRUST THAN COMPETENCE

Percent of predictable variance in trust explained by each dimension

Competence

24%



Ethics

76%

Washington, August 2019

The Business Roundtable redefines the purpose of a corporation



Biarritz, August 2019

Business for Inclusive Growth (B4IG) coalition forms to address inequality and diversity



New York, September 2019

Coalition of business, civil society and UN leaders pledge to set climate targets to 1.5°C



New York, January 2020

BlackRock shifts investment strategy to focus on sustainability



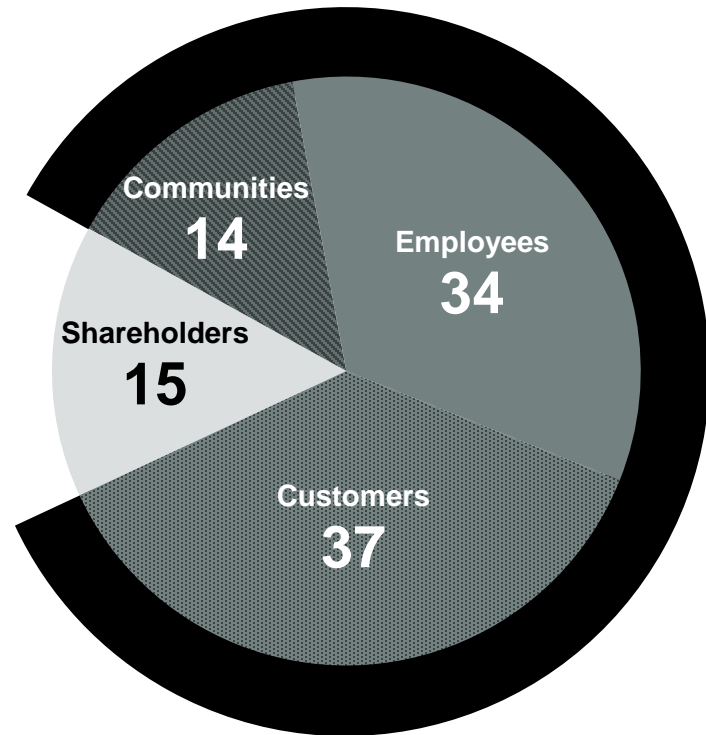
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BUSINESS: CATALYST FOR CHANGE

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SERVE THE INTERESTS OF ALL STAKEHOLDERS

Percent in Argentina who ranked each group as most important



— 85%

Stakeholders, not
shareholders, are most
important to long-term
company success

Percent in Argentina who agree

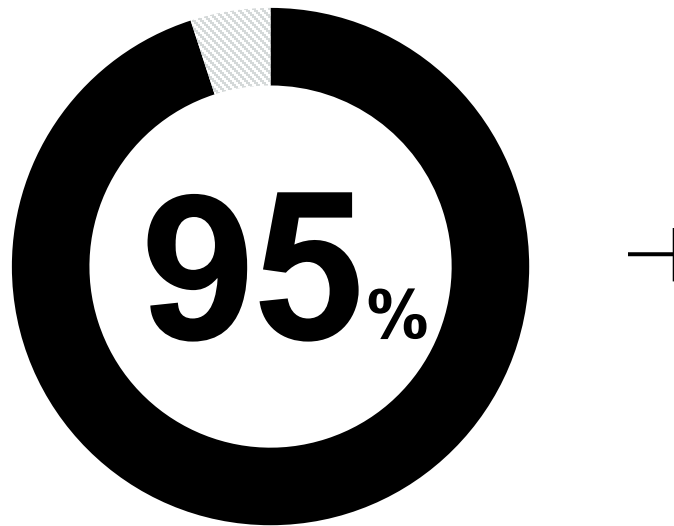
74%

a company can take actions
that both increase profits
and improve conditions in
communities where it operates

CEOS MUST LEAD

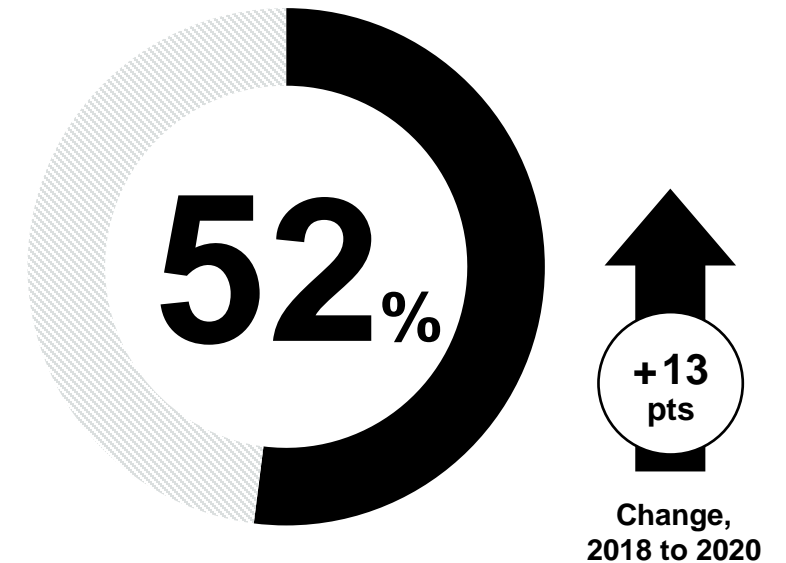
Percent in Argentina who agree

It is important that **my employer's CEO speak out** on one or more of these issues



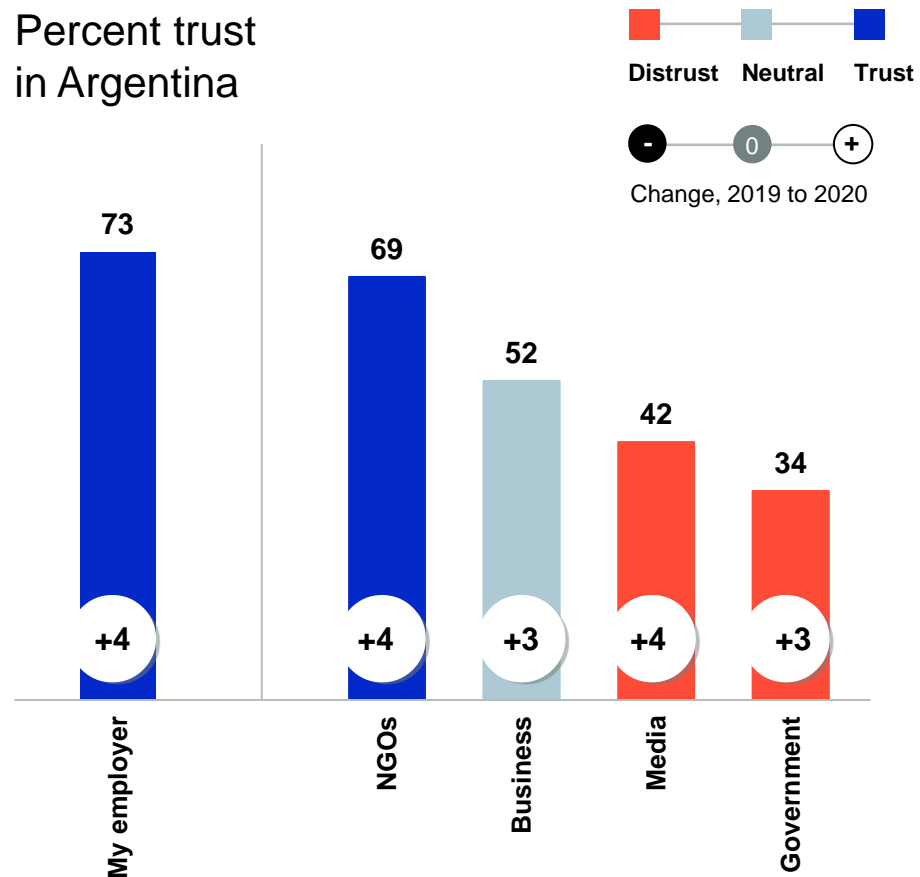
| | |
|---------------------------------|----|
| Training for jobs of the future | 86 |
| Ethical use of tech | 83 |
| Automation's impact on jobs | 82 |
| Income inequality | 80 |
| Diversity | 73 |
| Climate change | 72 |
| Immigration | 59 |

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



TRUST IS LOCAL: EMPLOYEES EXPECT TO BE HEARD

Percent trust
in Argentina



Percent of employees in Argentina who expect
each from a prospective employer

77%

Opportunity to **shape
the future** of society

74%

Employees **included
in planning**

CONSUMERS EXPECT BRANDS TO ACT

Percent of customers who are belief-driven buyers

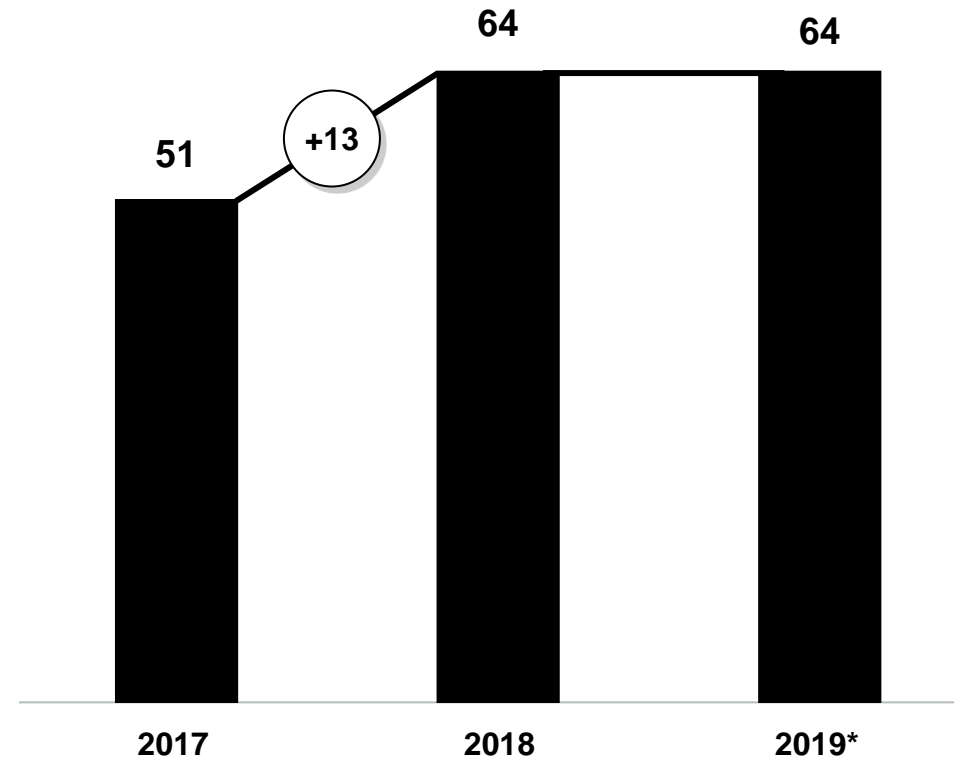
— 0 — + Change, 2017 to 2018

Brand Democracy

I believe brands can be a powerful force for change.

I expect them to represent me and solve societal problems.

My wallet is my vote.



Belief-driven buyers:

- choose
- switch
- avoid
- boycott

a brand based on its stand on societal issues

2018 Edelman Earned Brand. Belief-driven buying segments. 8-mkt avg. Belief-driven buyers choose, switch, avoid or boycott a brand based on its stand on societal issues.

*2019 Edelman Trust Barometer Special Report: In Brands We Trust? Mobile Survey. Belief-driven buying segments. 8-mkt avg. See Technical Appendix for a detailed explanation of how the Belief-driven buying score was calculated.

OVERCOME SKEPTICISM THROUGH ACTION

Percent in Argentina who agree

 Business **has a duty** to do this  I trust business **will do this**

Retrain employees
affected by automation
or innovation



Pay everyone a decent wage, even if that means
I must pay more



PARTNERSHIP BETWEEN BUSINESS AND GOVERNMENT ESSENTIAL ON JOBS

Percent who say each institution is the one they trust most to address each challenge (global data in background)



ADDRESSING GREATEST FAILURES GETS EVERY INSTITUTION TO TRUST

Percent who think each institution is doing well/very well on the issue, and the potential trust gains associated with doing each well



| NGOs | |
|--------------------------------|-----------|
| Transparency about funding | 35 |
| Expose corruption | 35 |
| Avoid becoming politicized | 35 |
| Partner with government | 38 |
| Partner with business | 38 |

| Business | |
|--------------------------------|-----------|
| Partner with NGOs | 33 |
| Jobs that pay a decent wage | 35 |
| Partner with government | 37 |
| Deal fairly with suppliers | 40 |
| Contribute to communities | 41 |

| Government | |
|------------------------------|-----------|
| Reduce partisanship | 26 |
| Partner with NGOs | 30 |
| Community-level problems | 31 |
| Social services for the poor | 34 |
| Partner with business | 34 |

| Media | |
|--------------------------------|----|
| Keep social media clean | 34 |
| Being objective | 35 |
| Information quality | 38 |
| Important vs sensationalized | 38 |
| Differentiate opinion and fact | 39 |



2020 Edelman Trust Barometer. Regression analysis. PER_[INSTITUTION]. How well do you feel [institution] is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of half of the sample. General population, 25-mkt avg. Data not collected in China, Russia and Thailand. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 25-mkt avg (excluding CN, RU, and TH). For a full explanation of how this data was calculated, please see the Technical Appendix.

ADDRESS GREATEST FAILURES TO IMPROVE TRUST IN ARGENTINA

Percent in Argentina who think each institution is doing well/very well on the issue

| NGOs | |
|--------------------------------|-----------|
| Expose corruption | 35 |
| Partner with government | 36 |
| Avoid becoming politicized | 38 |
| Transparency about funding | 40 |
| Partner with business | 44 |

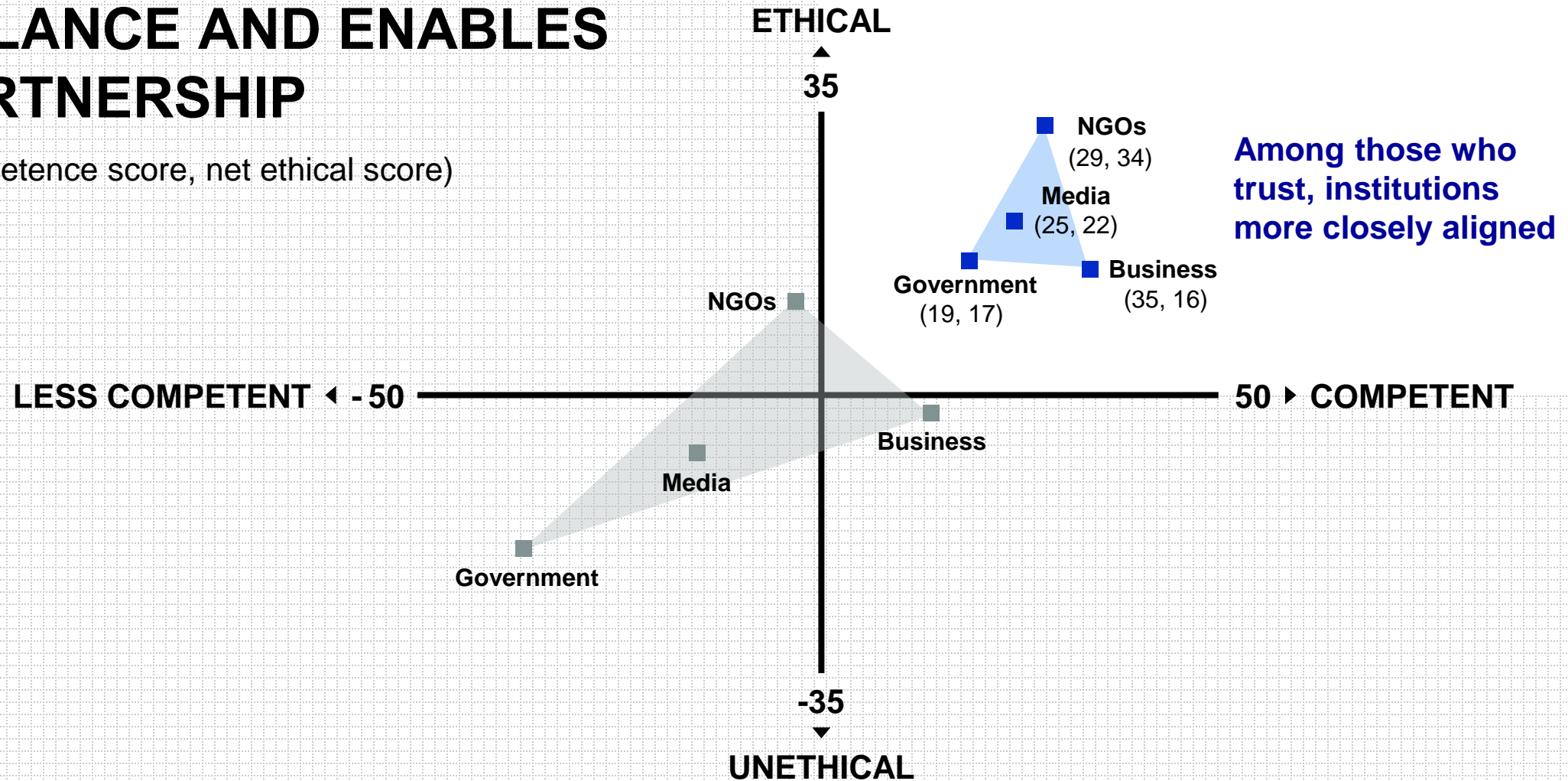
| Business | |
|--------------------------------|-----------|
| Partner with NGOs | 24 |
| Partner with government | 25 |
| Jobs that pay a decent wage | 26 |
| Drive economic prosperity | 36 |
| Contribute to communities | 36 |

| Government | |
|------------------------------|-----------|
| Reduce partisanship | 20 |
| Partner with NGOs | 25 |
| Partner with business | 25 |
| Community-level problems | 31 |
| Education | 32 |

| Media | |
|--------------------------------|----|
| Being objective | 23 |
| Keep social media clean | 28 |
| Important vs sensationalized | 29 |
| Information quality | 29 |
| Differentiate opinion and fact | 33 |

TRUST RESTORES BALANCE AND ENABLES PARTNERSHIP

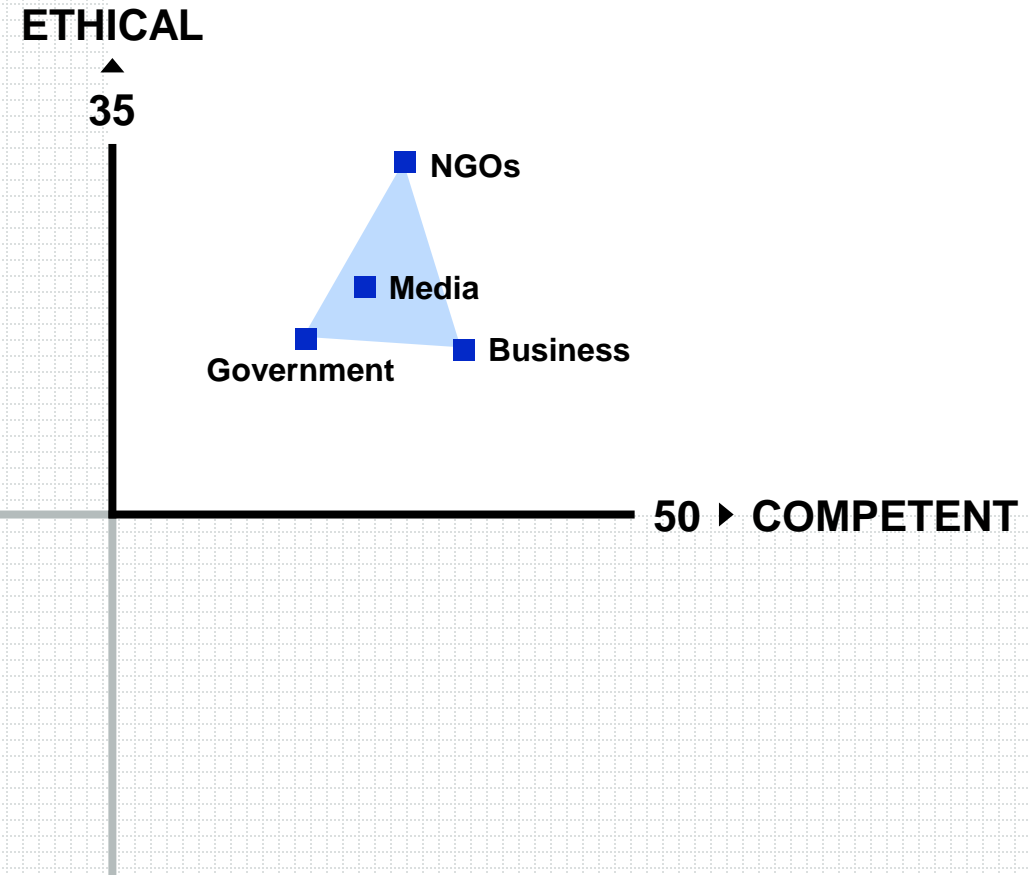
(Competence score, net ethical score)



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, 25-mkt avg. Data not collected in China, Russia and Thailand. Data for blue triangle is among those who trust each institution (TRU_INS top 4 box, trust). For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

BUILDING TRUST FOR THE FUTURE

- Pay fair wages
- Focus on education and retraining
- Embrace an all-stakeholders model
- Partner across institutions



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**SUPPLEMENTAL
DATA**
T

2020

2020 Edelman Trust Barometer

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Supplemental Data

1. Institutions: trust and performance

- NGOs
- Business
- Government
- Media
- Local vs central government
- The United Nations
- The European Union
- Performance

2. Trust in business in detail

3. Modeling trust

4. Trust and information

5. Societal issues

6. Employee expectations

⊥

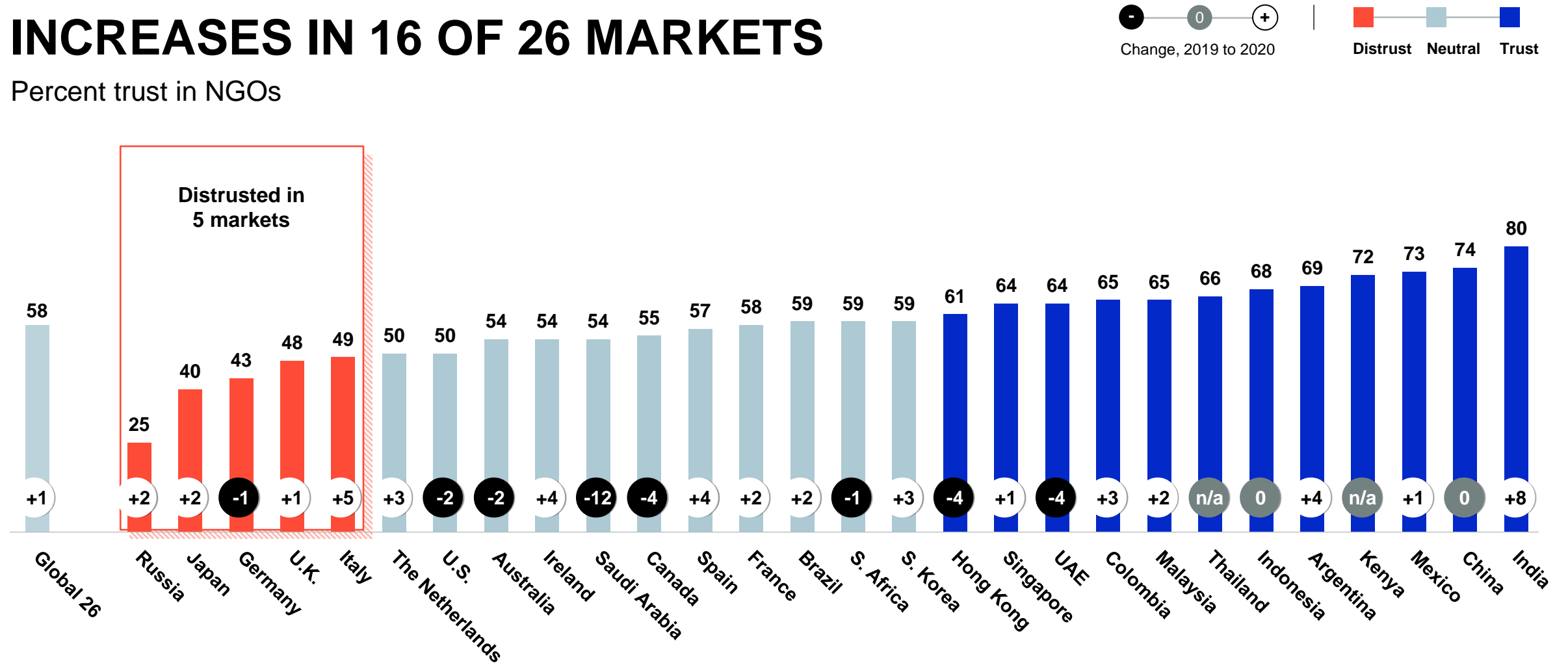
Institutions: Trust and Performance

T

TRUST IN NGOS

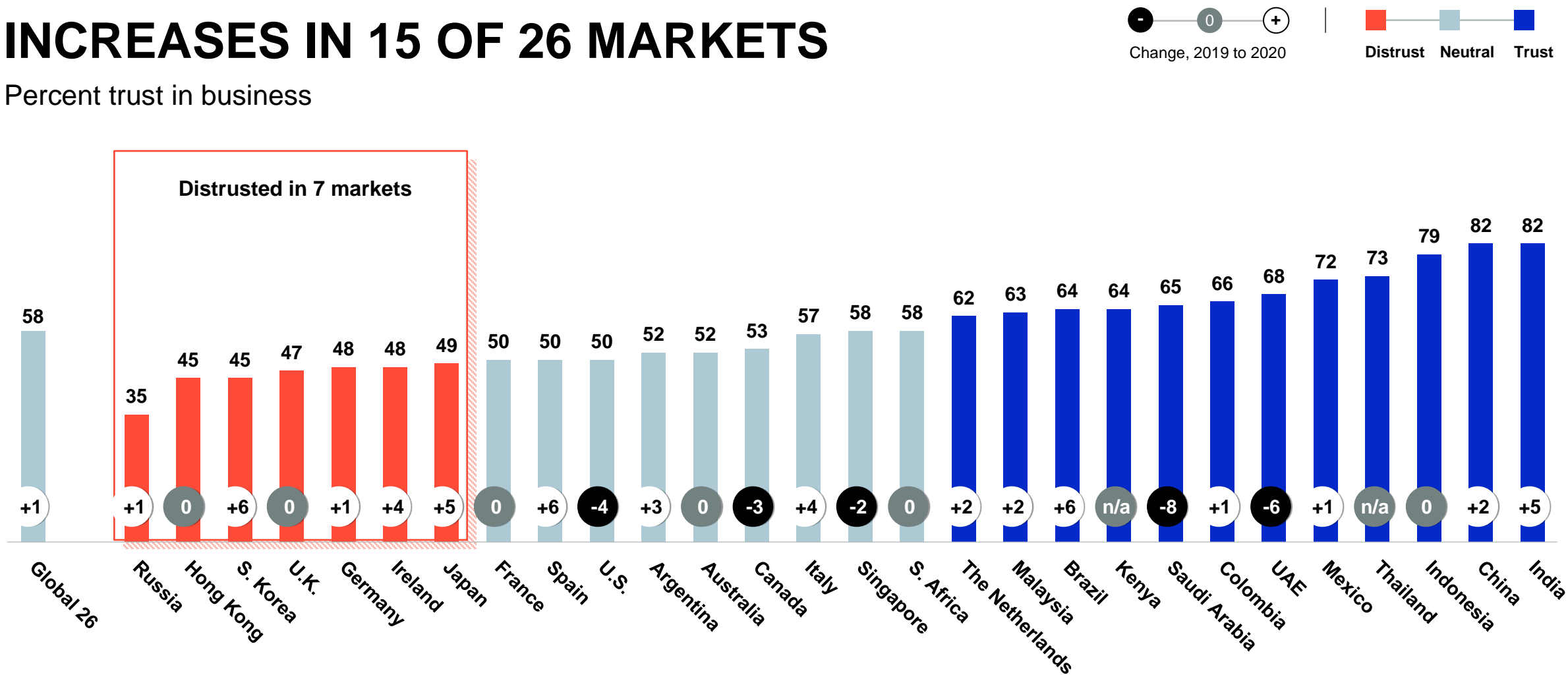
INCREASES IN 16 OF 26 MARKETS

Percent trust in NGOs



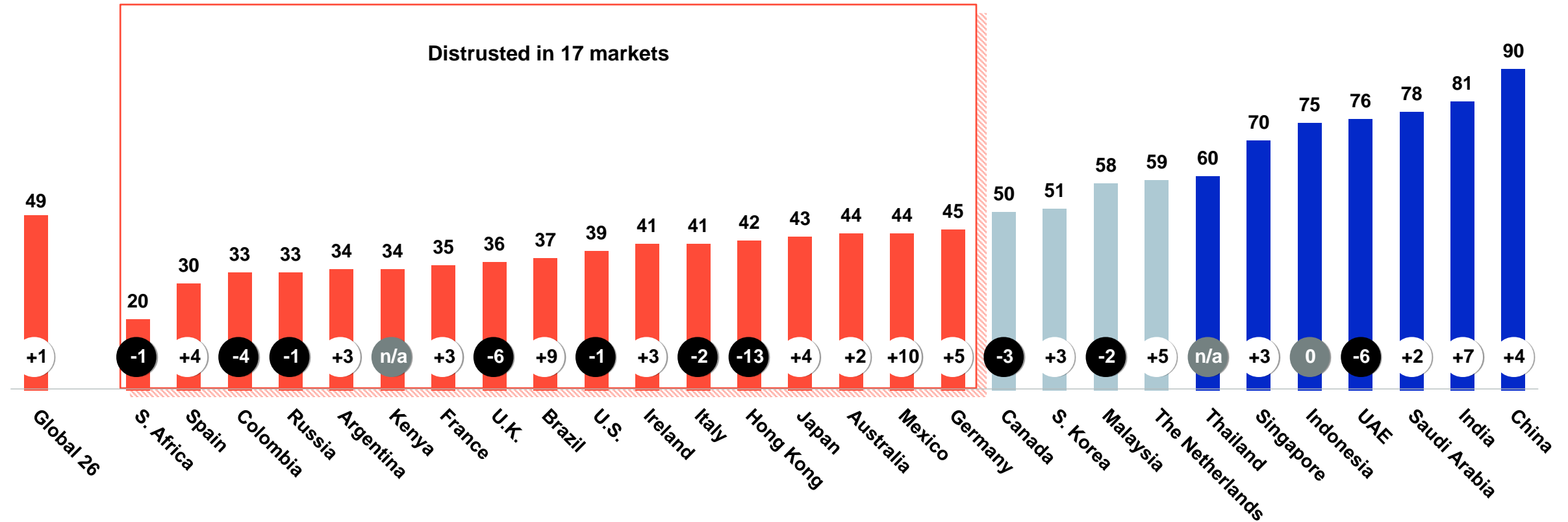
TRUST IN BUSINESS INCREASES IN 15 OF 26 MARKETS

Percent trust in business



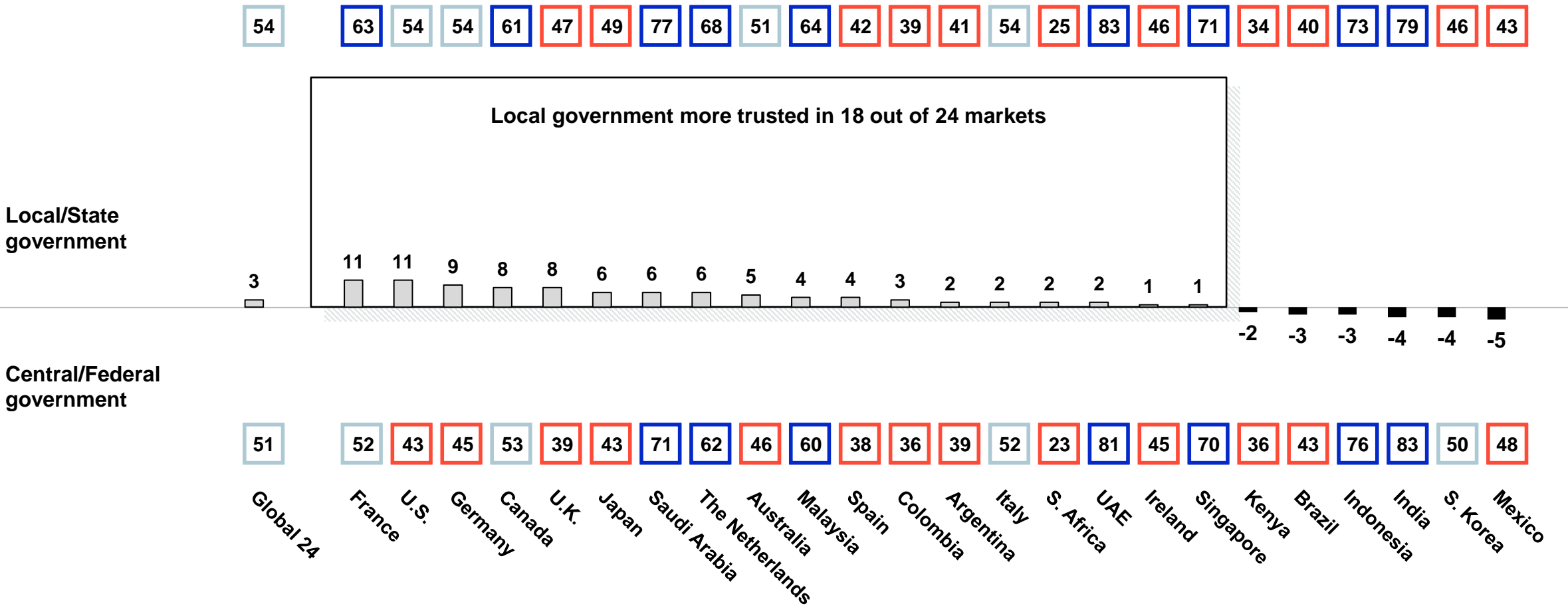
TRUST IN GOVERNMENT INCREASES IN 15 OF 26 MARKETS

Percent trust in government



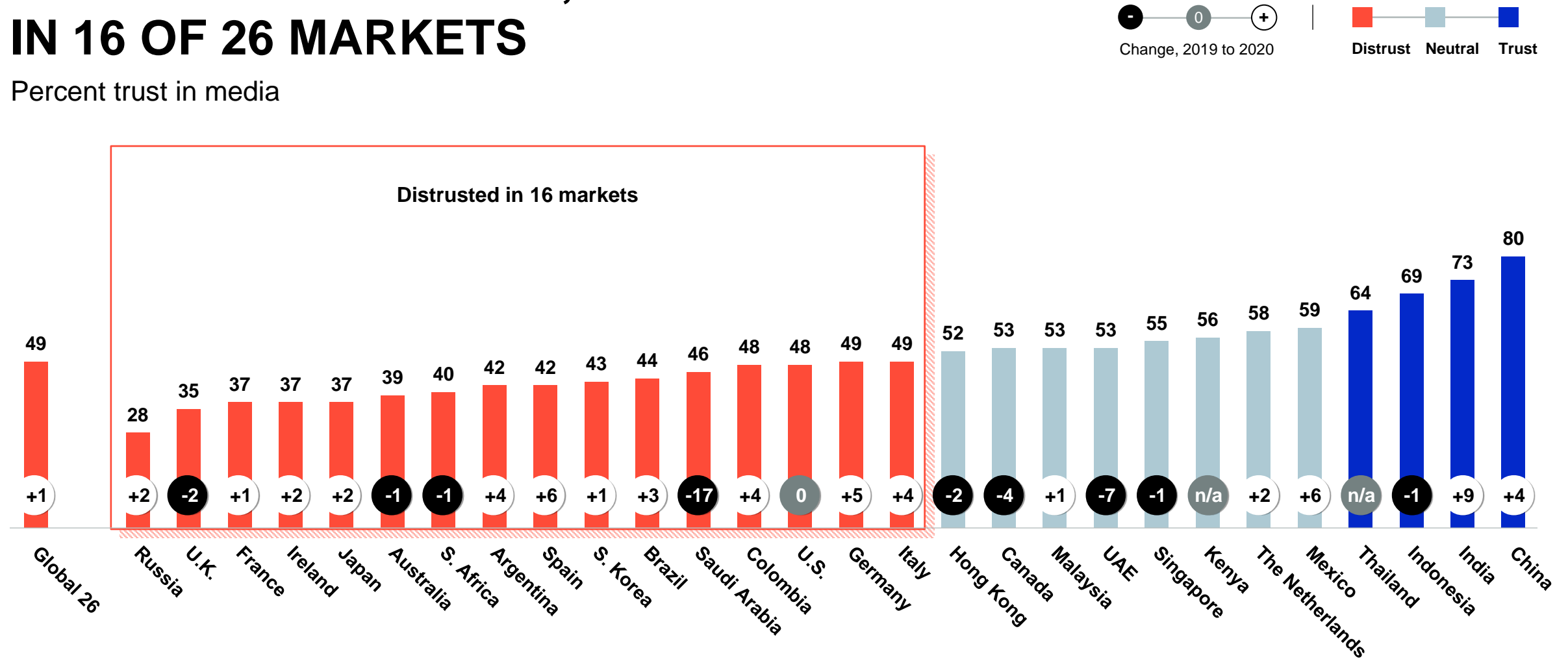
MORE TRUST IN LOCAL GOVERNMENT

Percentage point gap between trust in local/state government and central/federal government



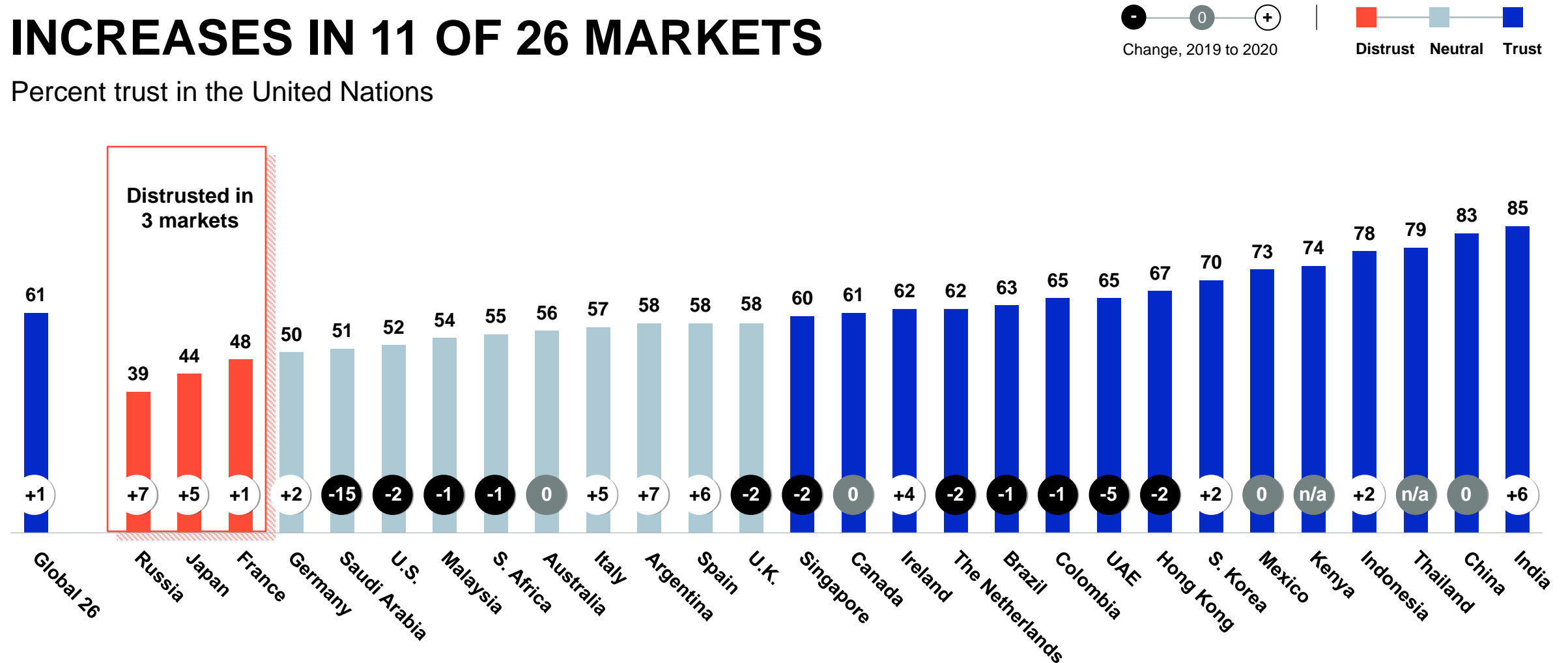
TRUST IN MEDIA RISES, IN 16 OF 26 MARKETS

Percent trust in media



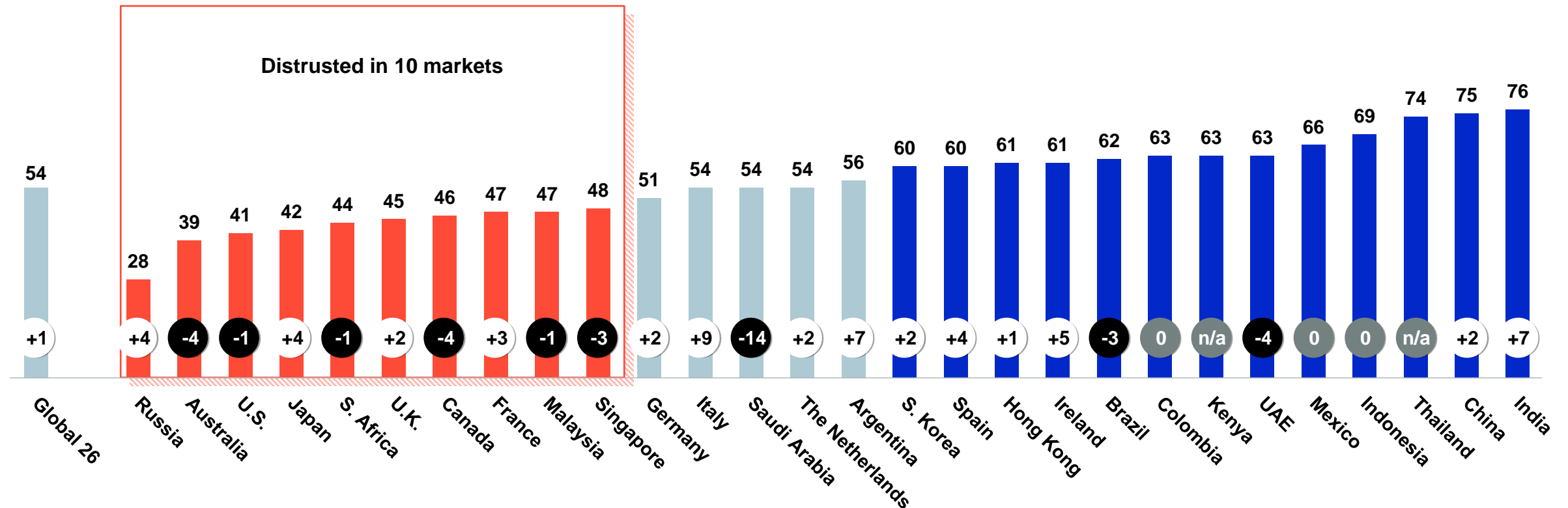
TRUST IN THE UNITED NATIONS INCREASES IN 11 OF 26 MARKETS

Percent trust in the United Nations



TRUST IN THE EUROPEAN UNION INCREASES IN 14 OF 26 MARKETS

Percent trust in the European Union



INSTITUTIONAL PERFORMANCE

Percent in Argentina who think each institution is doing well/very well on the issue

Strength > 50%

Weakness < 50%

| NGOs | |
|---------------------------------------|----|
| Protect the environment | 66 |
| Protect civil and human rights | 61 |
| Community-level problems | 58 |
| Global-level problems | 56 |
| Educate people for good decisions | 56 |
| Poverty, illiteracy, disease | 53 |
| Set goals with regular public updates | 46 |
| Partner with business | 44 |
| Transparency about funding | 40 |
| Avoid becoming politicized | 38 |
| Partner with government | 36 |
| Expose corruption | 35 |

| Business | |
|--------------------------------|----|
| Generate value for owners | 59 |
| Meet customer expectations | 52 |
| Engine of innovation | 51 |
| Sustainable business practices | 45 |
| Diversity in the workplace | 38 |
| Invest in employee training | 38 |
| Deal fairly with suppliers | 37 |
| Contribute to communities | 36 |
| Drive economic prosperity | 36 |
| Jobs that pay a decent wage | 26 |
| Partner with government | 25 |
| Partner with NGOs | 24 |

| Government | |
|---|----|
| Safe and modern infrastructure | 46 |
| International alliances, defense | 46 |
| Regulate emerging tech | 41 |
| Protect civil and human rights | 41 |
| Balance national interests and international engagement | 35 |
| Maintain law and order | 35 |
| Social services for the poor | 34 |
| Education | 32 |
| Community-level problems | 31 |
| Partner with business | 25 |
| Partner with NGOs | 25 |
| Reduce partisanship | 20 |

| Media | |
|--------------------------------|----|
| Covering national news | 63 |
| Covering international news | 58 |
| Covering local news | 57 |
| Enough journalists | 56 |
| Let people be heard | 45 |
| Exposing corruption | 37 |
| Information for good decisions | 35 |
| Differentiate opinion and fact | 33 |
| Information quality | 29 |
| Important vs sensationalized | 29 |
| Keep social media clean | 28 |
| Being objective | 23 |



2020 Edelman Trust Barometer. PER_[INSTITUTION]. How well do you feel [institution] is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of half of the sample. General population, Argentina.

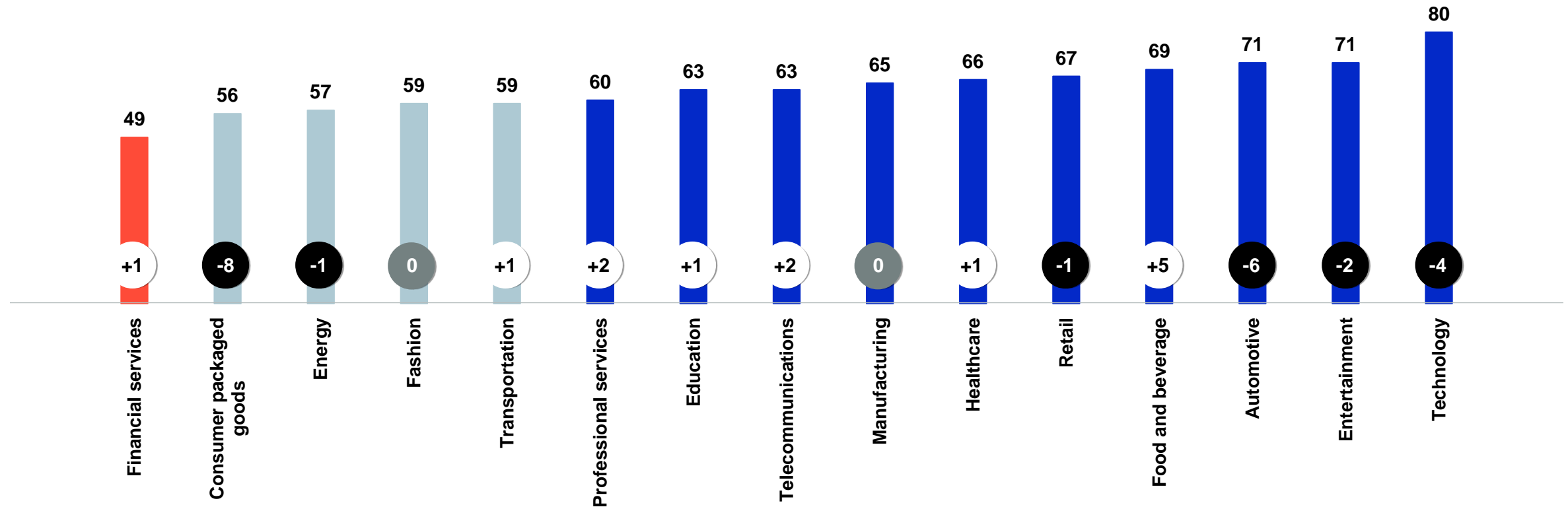
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Trust in Business in Detail

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TRUST IN INDUSTRY SECTORS

Percent trust in each sector in Argentina



INDUSTRY SECTORS OVER TIME

Percent trust in each sector in Argentina

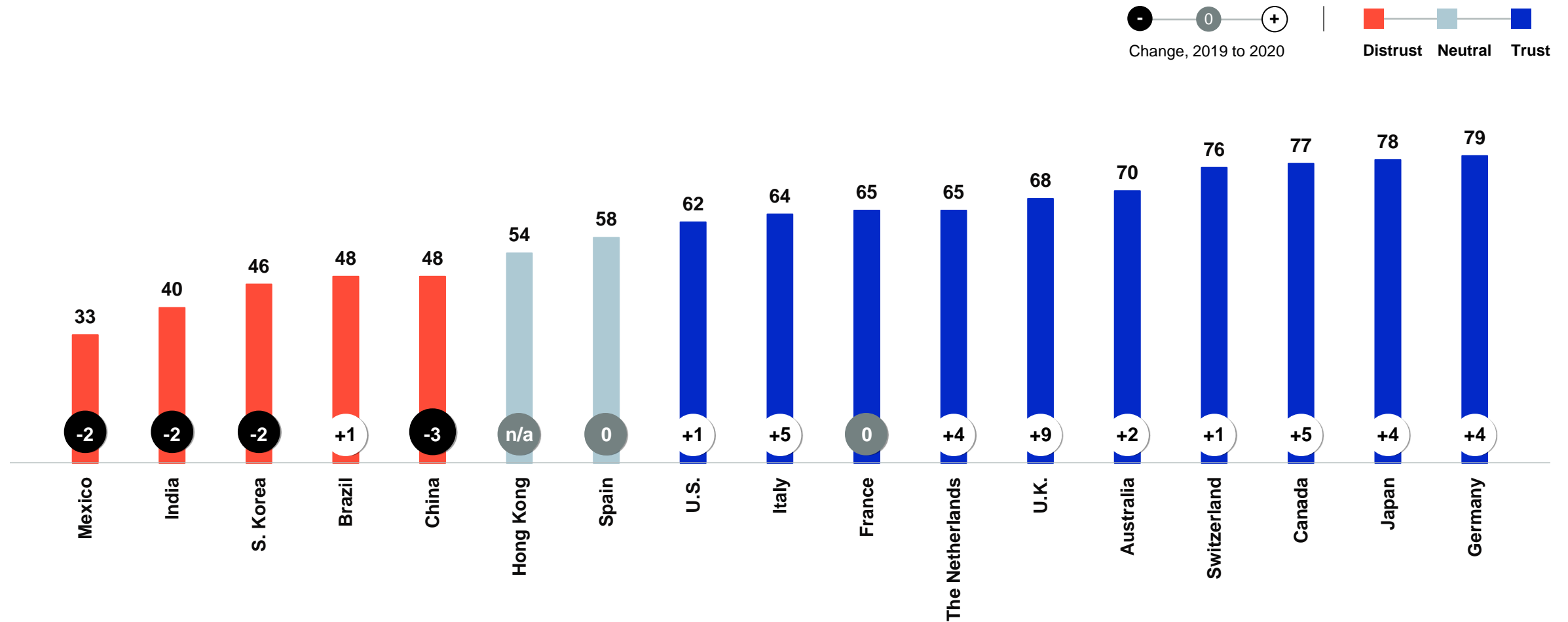


| Industry | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 8yr. Trend |
|-------------------------|------|------|------|------|------|------|------|------|------|------------|
| Technology | 84 | 81 | 82 | 74 | 79 | 77 | 77 | 84 | 80 | -4 |
| Automotive | 73 | 75 | 80 | 69 | 69 | 70 | 67 | 77 | 71 | -2 |
| Entertainment | - | 71 | 72 | 65 | 67 | 66 | 65 | 73 | 71 | n/a |
| Food and beverage | 70 | 73 | 72 | 66 | 67 | 68 | 61 | 64 | 69 | -1 |
| Healthcare | - | - | - | - | 61 | 65 | 61 | 65 | 66 | n/a |
| Telecommunications | 55 | 59 | 53 | 49 | 49 | 53 | 58 | 61 | 63 | +8 |
| Energy | 52 | 57 | 55 | 47 | 51 | 50 | 56 | 58 | 57 | +5 |
| Consumer packaged goods | 60 | 60 | 59 | 54 | 58 | 56 | 53 | 64 | 56 | -4 |
| Financial services | 39 | 42 | 44 | 41 | 43 | 42 | 45 | 48 | 49 | +10 |



TRUST IN COMPANIES FROM DIFFERENT MARKETS

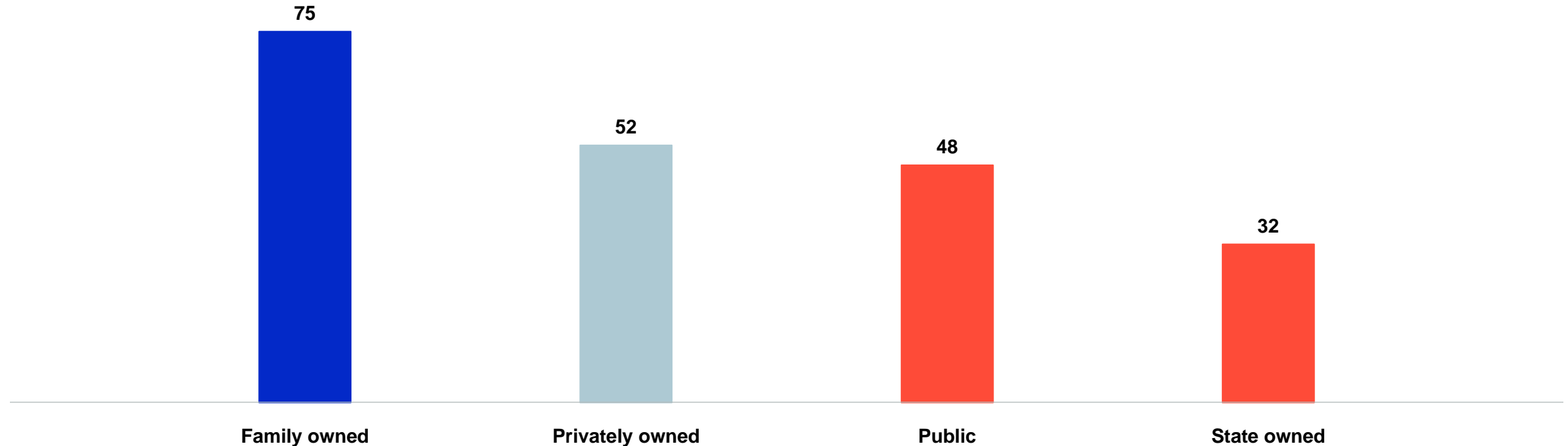
Trust in companies headquartered in each market in Argentina



FAMILY-OWNED BUSINESSES MOST TRUSTED

Percent trust in each type of business in Argentina

 Distrust Neutral Trust



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Modeling Trust

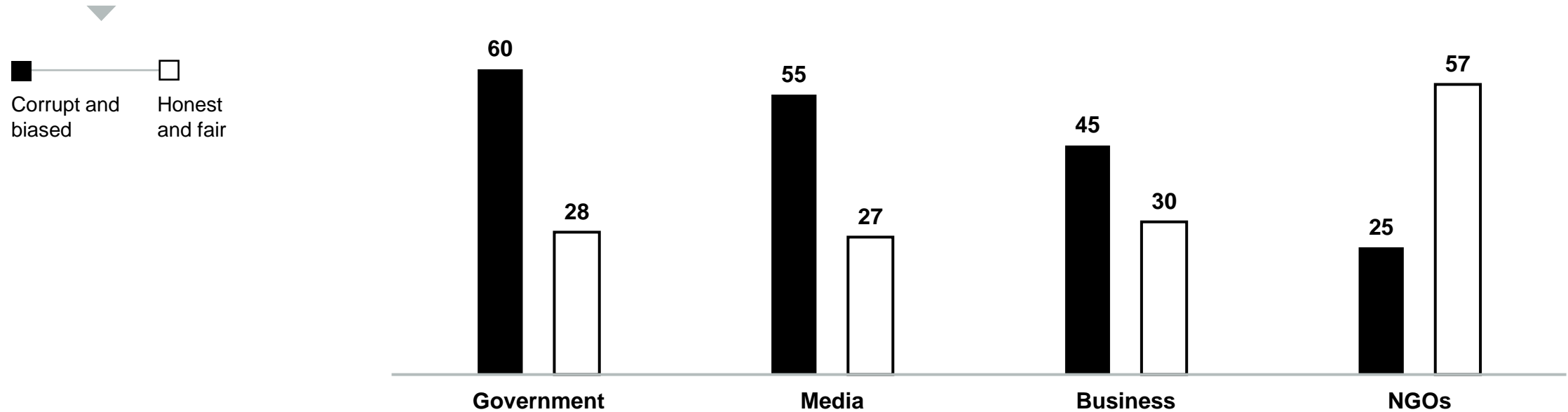
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ONLY NGOs SEEN AS HONEST

Percent in Argentina who cite each as a reason they trust or distrust each institution

This institution...

- Is purpose-driven
- **Is honest**
- Has vision
- Is fair

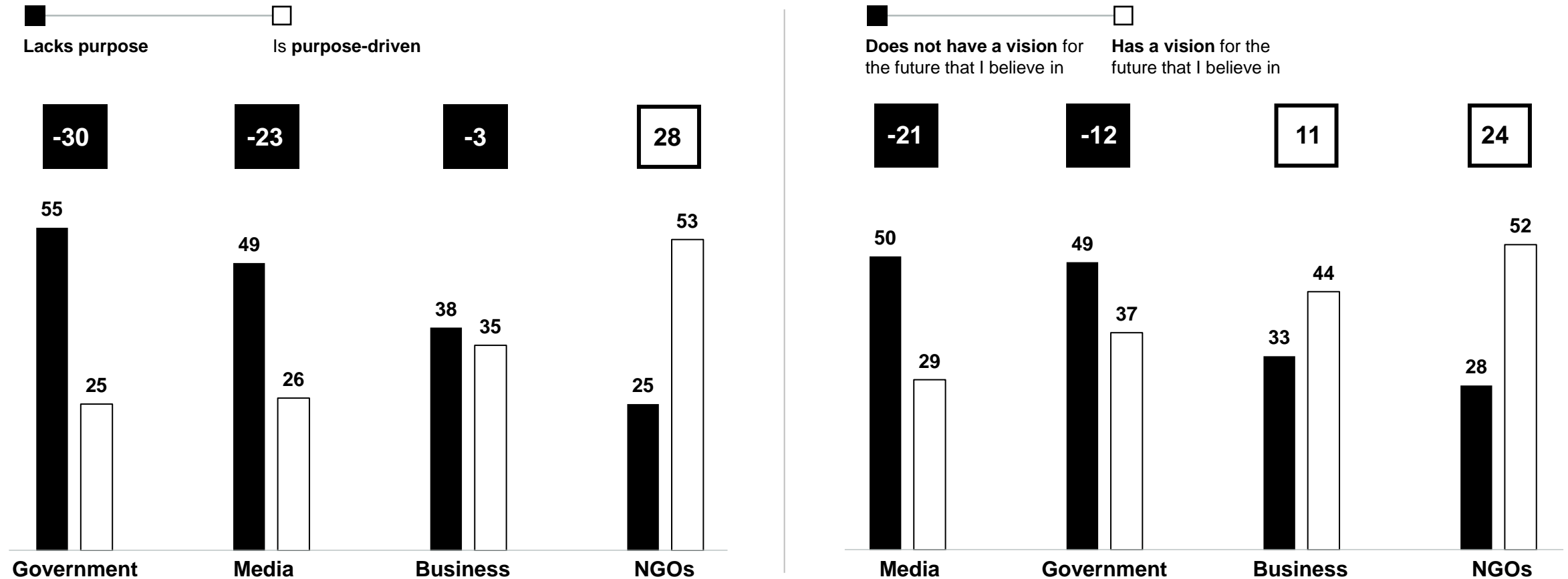


2020 Edelman Trust Barometer. Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive; bottom 5 box, negative. Question asked of half of the sample. General population, Argentina.

GOVERNMENT AND MEDIA SEEN AS LACKING PURPOSE AND VISION FOR THE FUTURE

Percent in Argentina who cite each as a reason they trust or distrust each institution

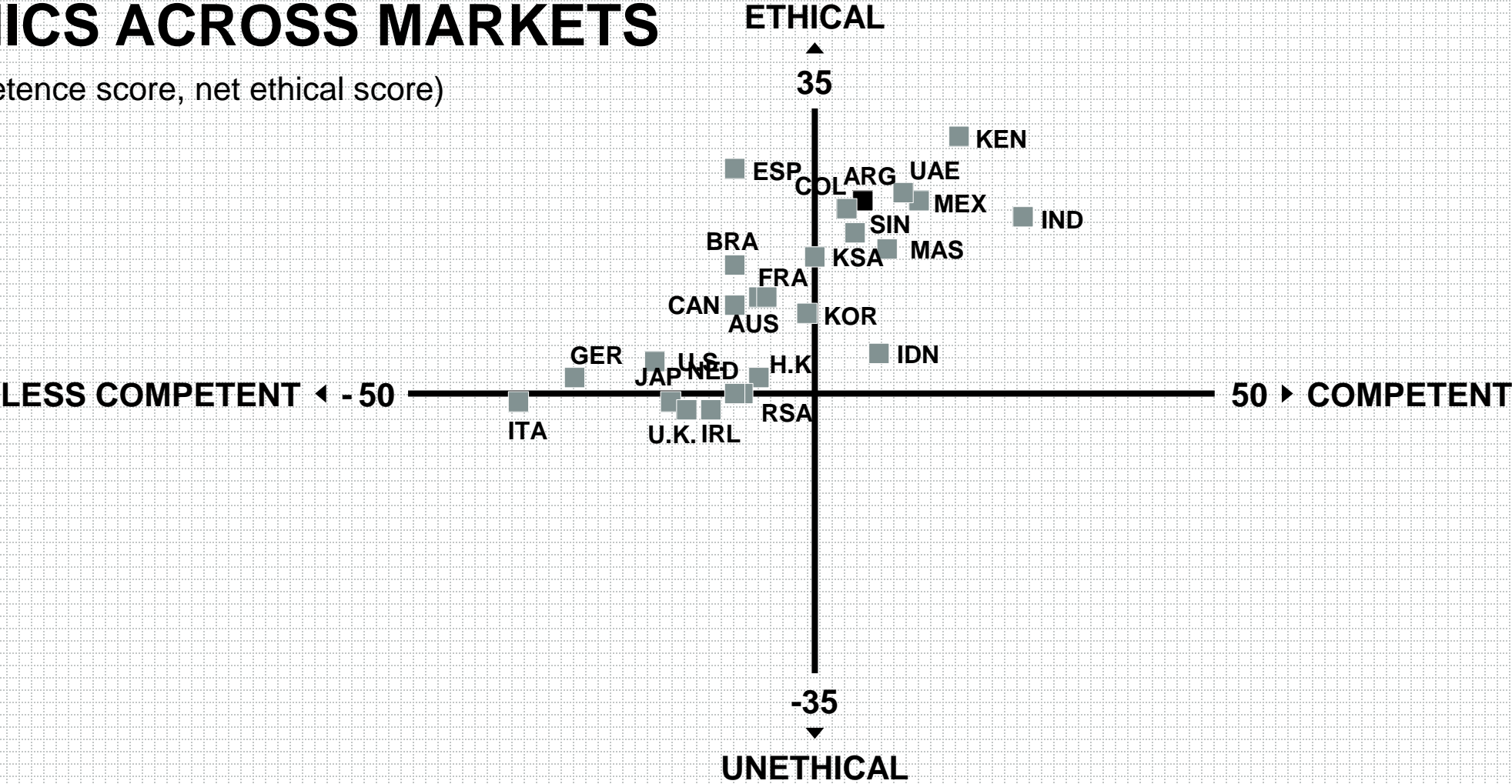
- This institution...
- Is purpose-driven
 - Is honest
 - Has vision
 - Is fair



2020 Edelman Trust Barometer. Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. 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. 11-point scale; top 5 box, positive; bottom 5 box, negative. Question asked of half of the sample. General population, Argentina.

NGOS: COMPETENCE AND ETHICS ACROSS MARKETS

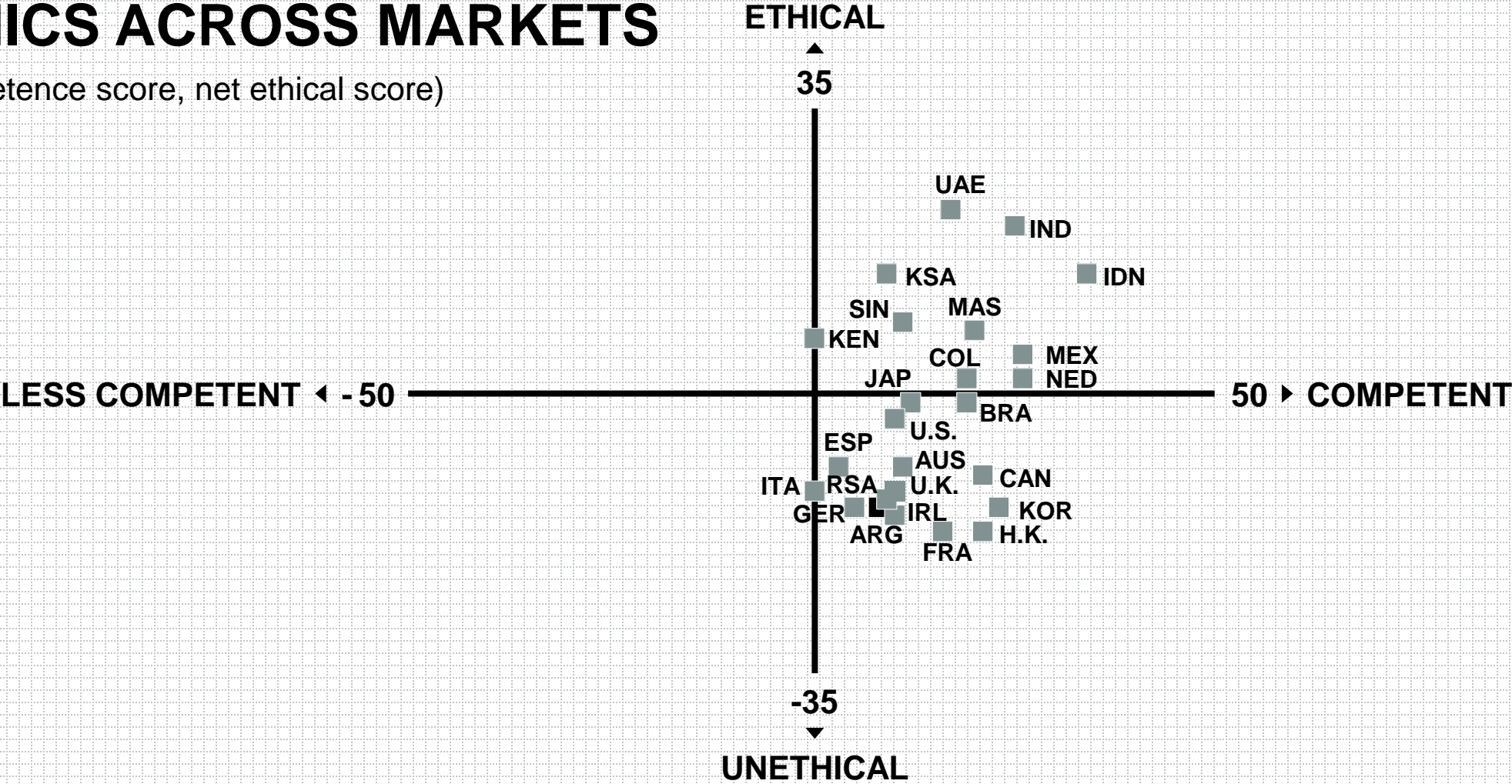
(Competence score, net ethical score)



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D [INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, by market. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

BUSINESS: COMPETENCE AND ETHICS ACROSS MARKETS

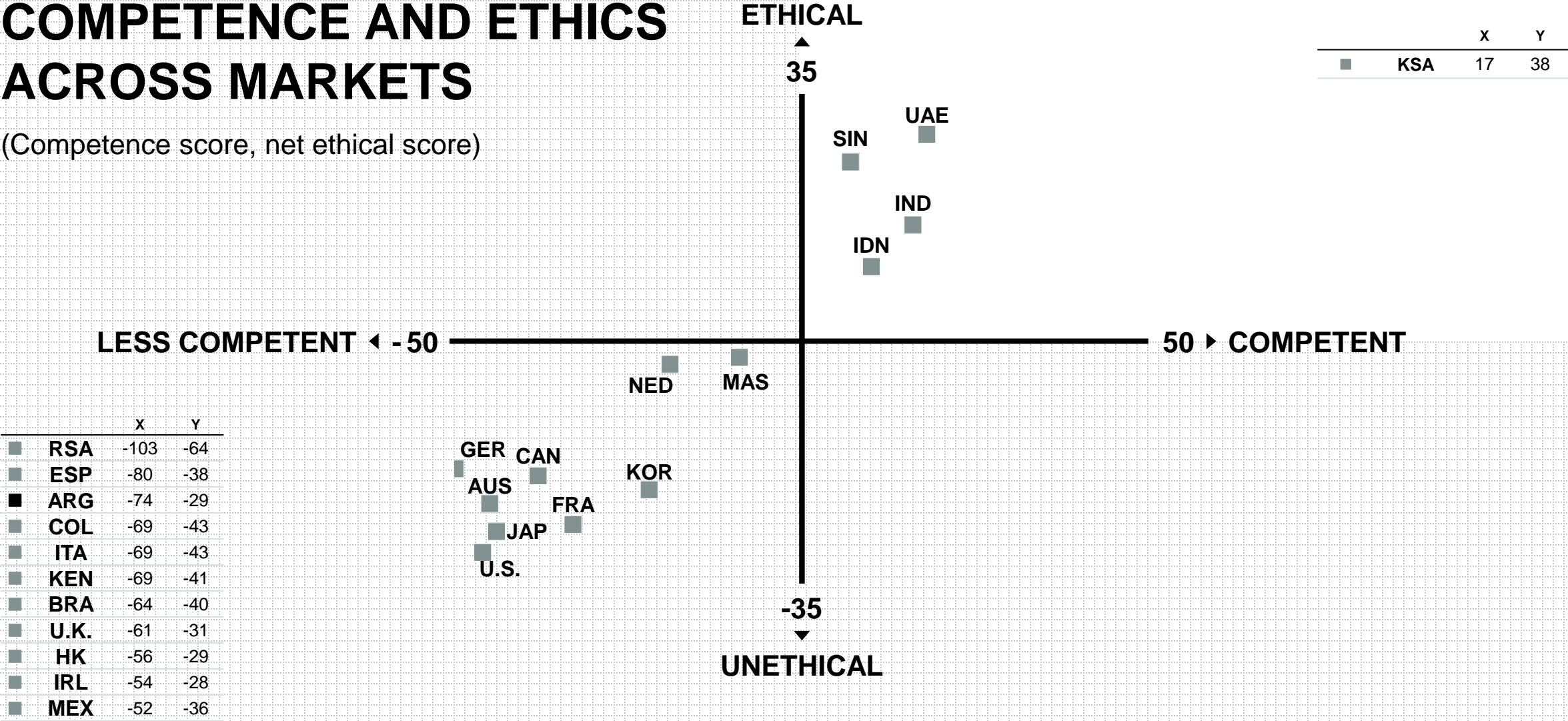
(Competence score, net ethical score)



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D [INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, by market. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

GOVERNMENT: COMPETENCE AND ETHICS ACROSS MARKETS

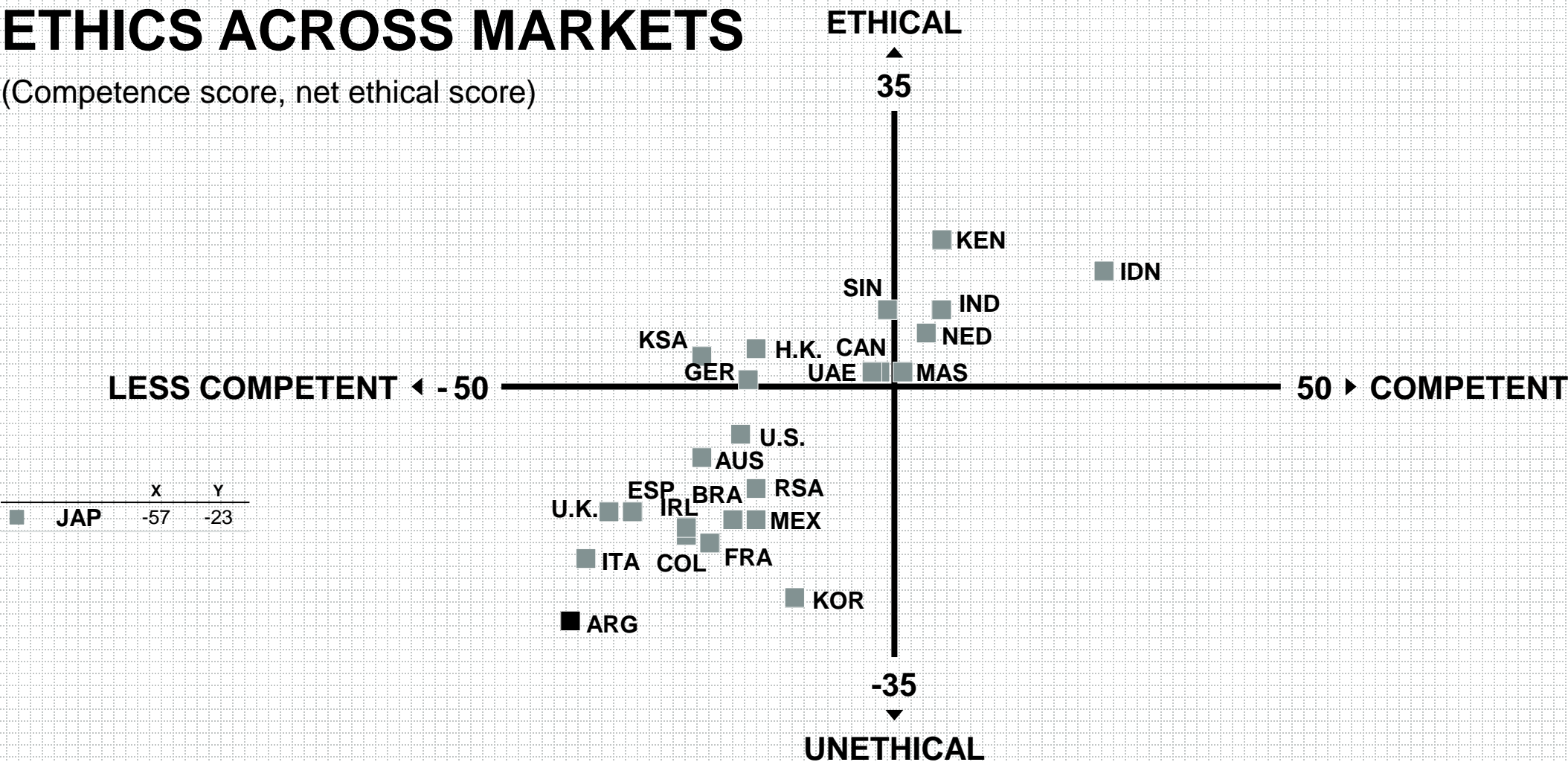
(Competence score, net ethical score)



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D _[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, by market. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

MEDIA: COMPETENCE AND ETHICS ACROSS MARKETS

(Competence score, net ethical score)



2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D [INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, by market. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

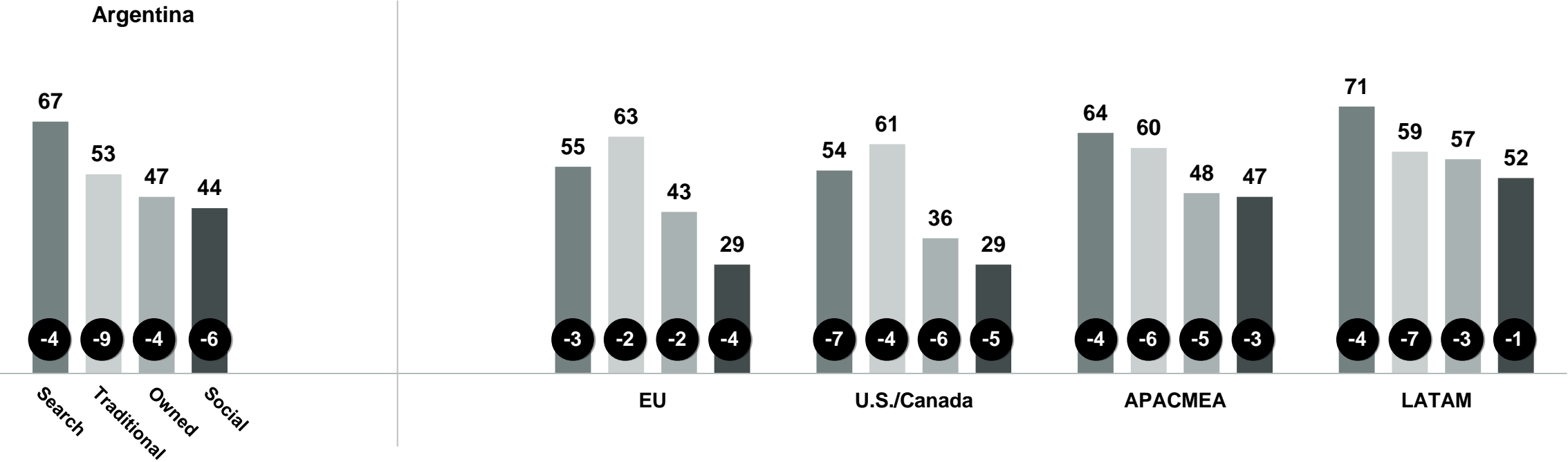
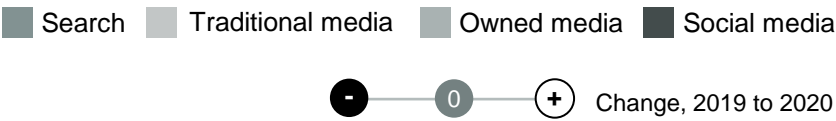
⊥

Trust and Information

T

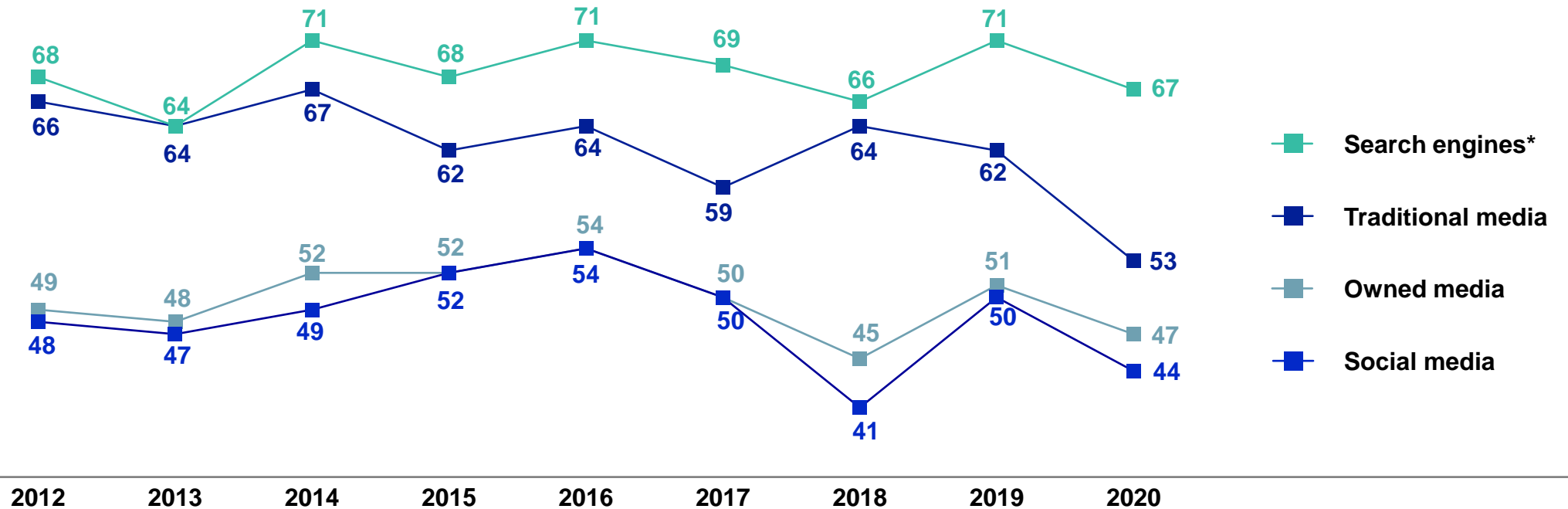
CHAMPION RELIABLE SOURCES

Percent who trust each source of news



SEARCH ENGINES AND TRADITIONAL MEDIA MOST TRUSTED MEDIA SOURCES

Percent trust in each source for general news and information in Argentina



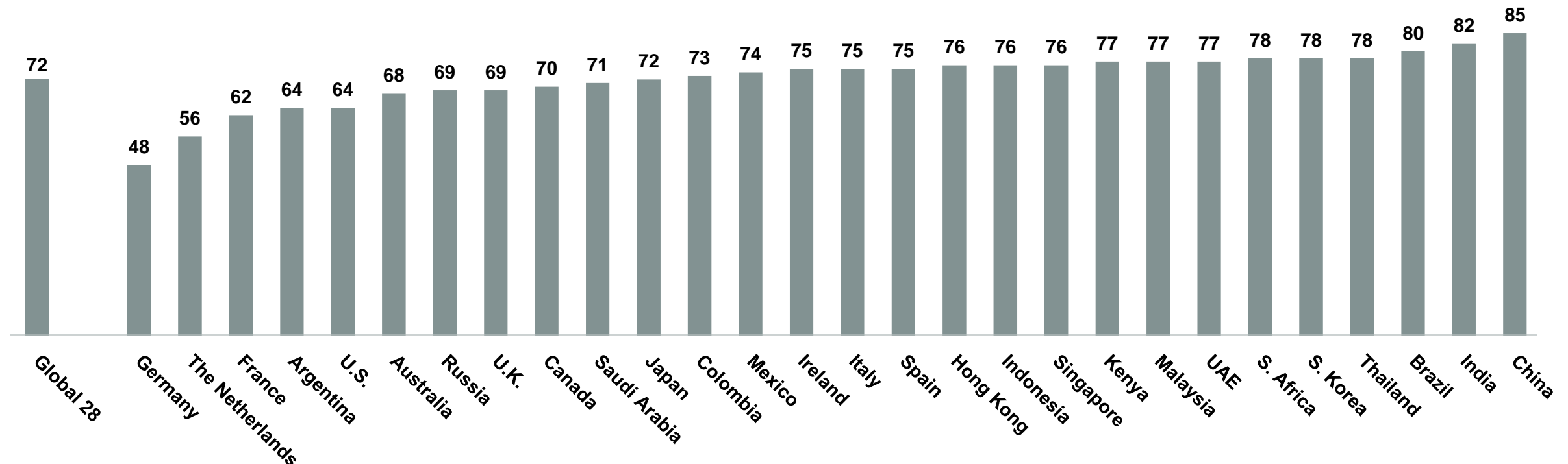
2020 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Argentina.

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

ADVERTISERS HELD ACCOUNTABLE FOR FAKE NEWS

Percent who agree

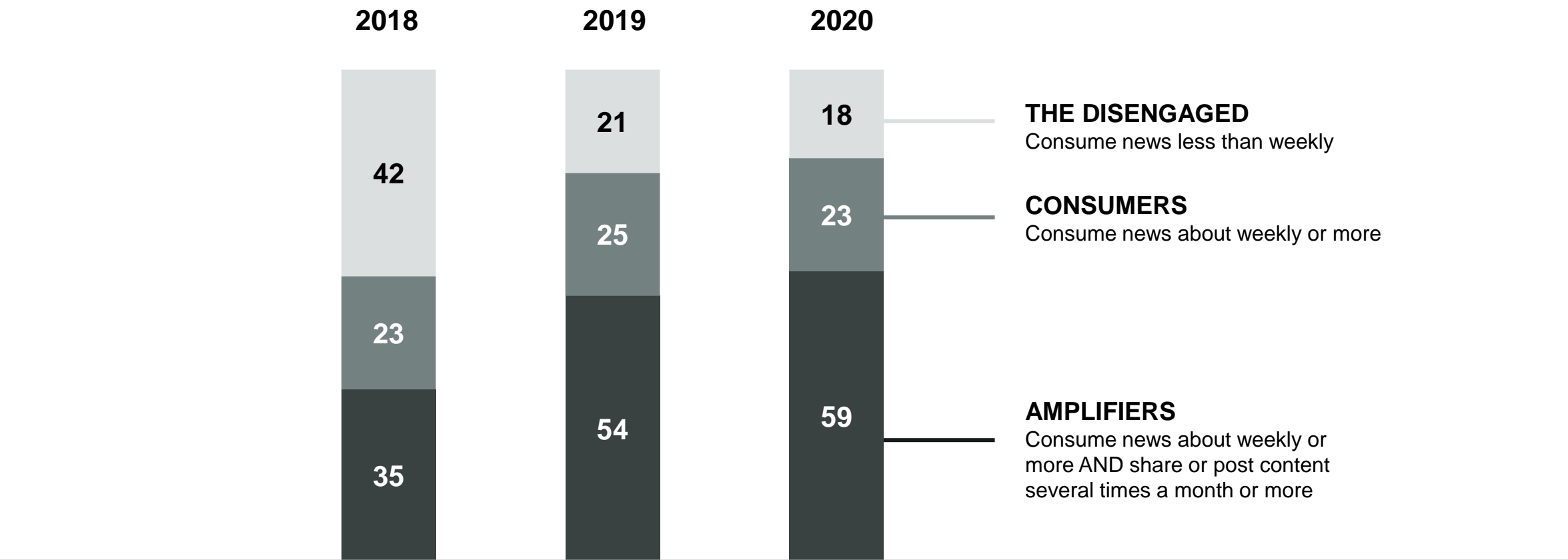
Companies **should stop advertising with any media platform** that fails to prevent the spread of fake news and false information



2020 Edelman Trust Barometer. CMP_DUT. For each of the actions below, please indicate whether you believe that this is something that companies have a duty to do, but you do/do not trust that they will ever follow through and consistently do it. 3-point scale; sum of codes 2 and 3, have a duty. General population, 28-mkt avg.

CONTINUED ENGAGEMENT WITH NEWS IN ARGENTINA

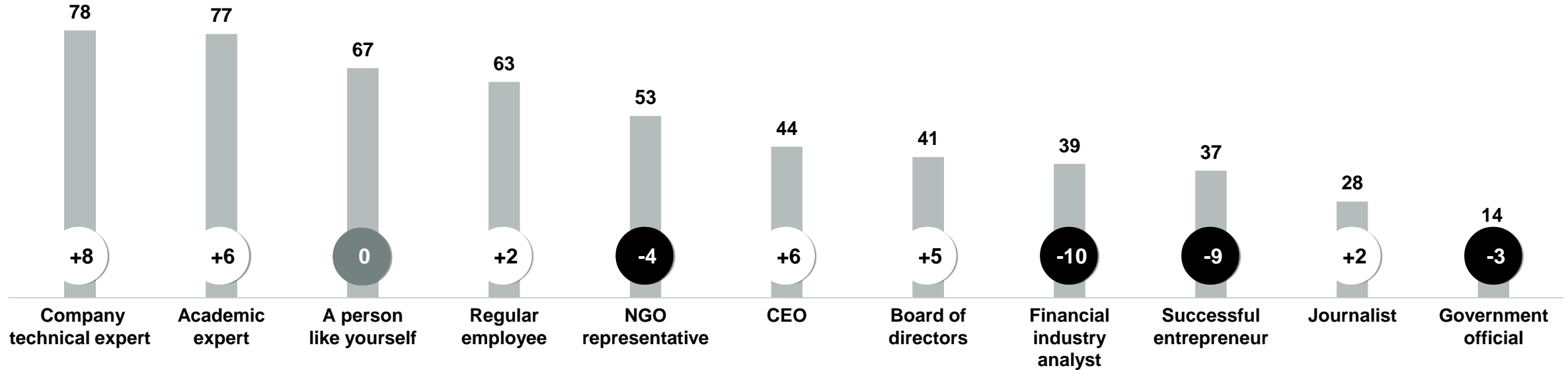
How often do you engage in the following activities related to news and information?




EXPERTS AND PEERS MOST CREDIBLE

Percent in Argentina who rate each source as very/extremely credible

 Change, 2019 to 2020



 **2020 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. Spokespeople asked of half of the sample. General population, Argentina.

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Societal Issues

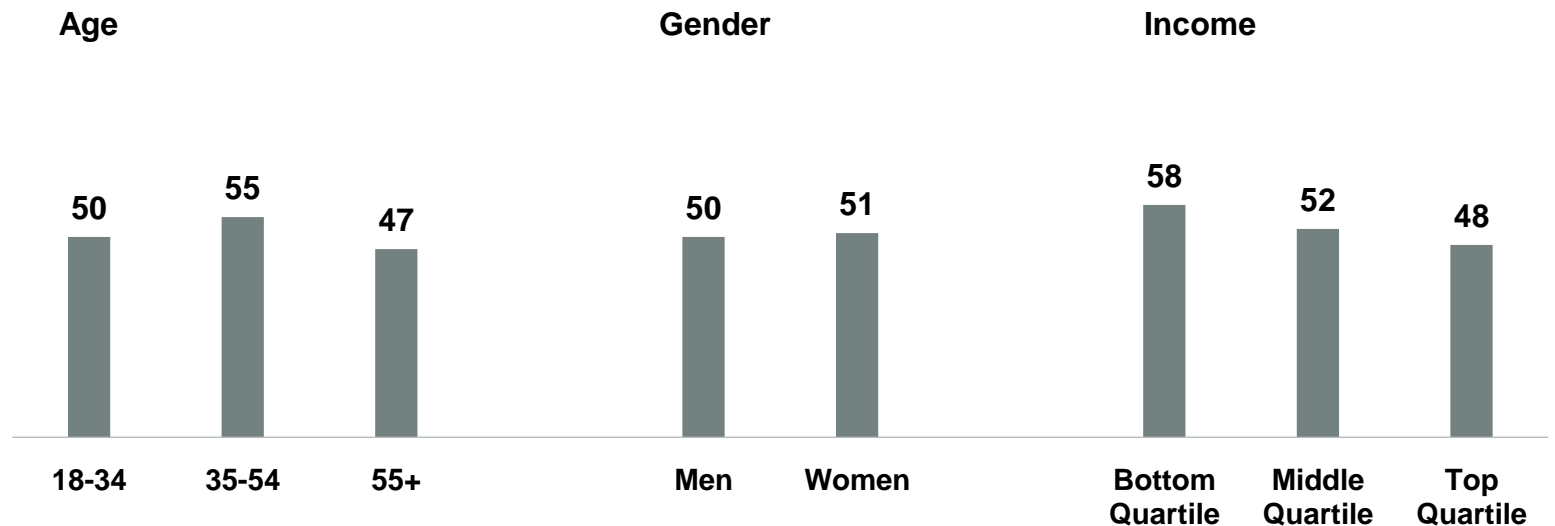
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CAPITALISM IN QUESTION ACROSS GENERATIONS, GENDERS AND INCOME GROUPS

Percent in Argentina who agree

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

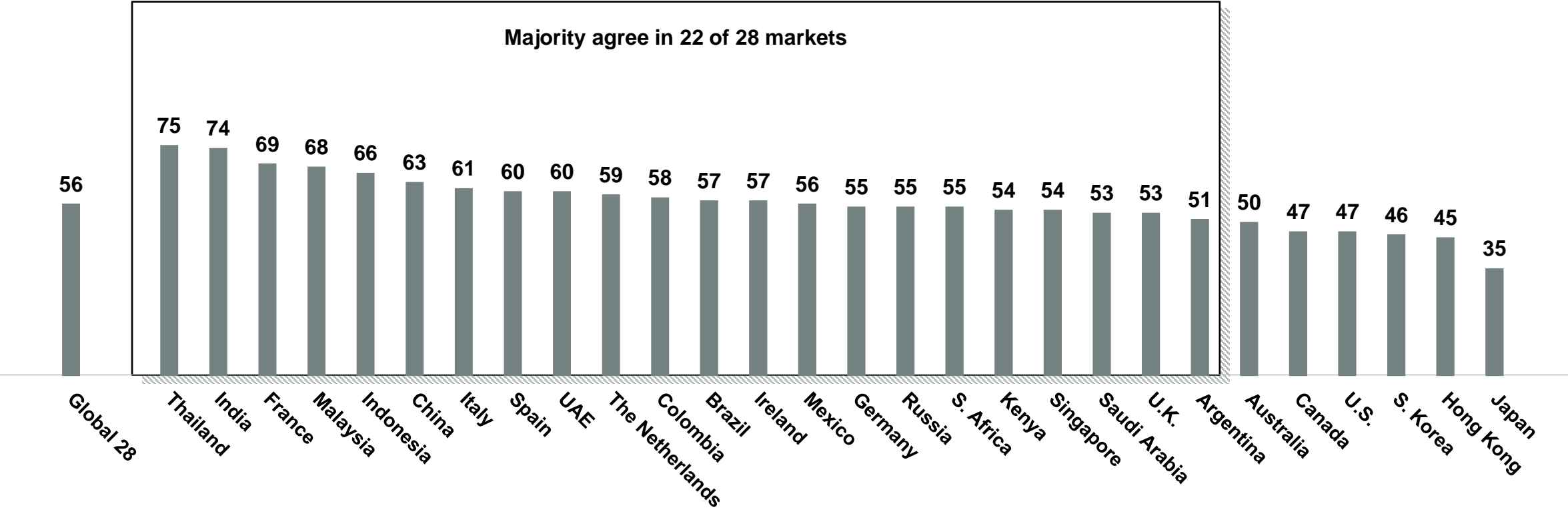
└
51%



CAPITALISM IN QUESTION AROUND THE WORLD

Percent who agree

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



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 | 49 |
| Germany | 51 | 45 | 43 | 42 | 41 | 40 | 46 |
| Hong Kong | 60 | 52 | 58 | 46 | 49 | 50 | 44 |
| India | 82 | 80 | 81 | 79 | 80 | 77 | 77 |
| Indonesia | 61 | 58 | 61 | 58 | 56 | 57 | 52 |
| Ireland | 57 | 55 | 50 | 45 | 42 | 39 | 40 |
| Italy | 60 | 64 | 55 | 57 | 53 | 51 | 70 |
| Japan | 44 | 37 | 45 | 38 | 44 | 38 | 40 |
| 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).

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TECHNICAL APPENDIX

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2. Sample sizes and margin of error

3. Markets covered and languages used

4. How we measured belief in the system

5. How we plotted the institutional competence and ethics scores

6. How we measured the importance of competence and ethics in determining trust in a company

7. How we measured belief-driven buying

8. How we calculated the trust gains associated with improved institutional performance

20th ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 markets

34,000+ respondents total

All fieldwork was conducted between
October 19 and November 18, 2019

28-market global data margin of error: General population +/- 0.6% (N=32,200), informed public +/- 1.2% (N=6,200), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8% (N=16,100).

Market-specific data margin of error: General population +/- 2.9% (N=1,150), informed public +/- 6.9% (N = min 200, varies by market), China and U.S. +/- 4.4% (N=500), mass population +/- 3.0% to 3.6% (N =min 736, varies by market).

Gen Z MOE: 28-market = +/- 1.5% (N=4,310)

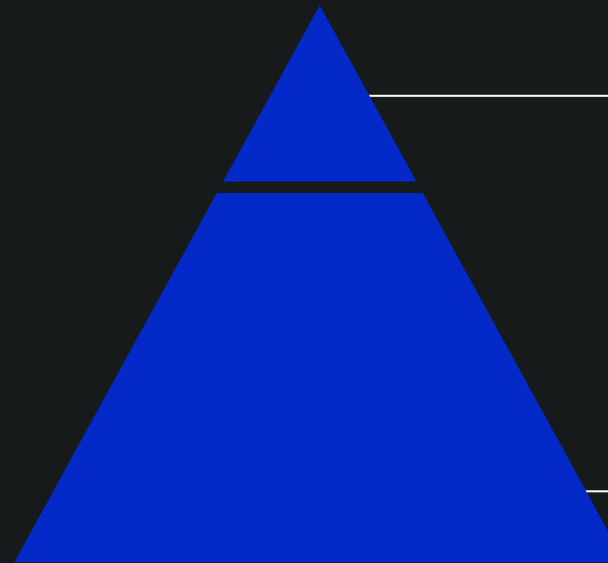
Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

General Online Population

1,150
respondents
per market

Ages
18+

All slides show general
online population data
unless otherwise noted



2020 Gen Z oversample

250 respondents age 18-24 per market



Informed Public

500 respondents in U.S. and China;
200 in all other markets

Represents **17%** of total global population

Must meet 4 criteria

- ▶ Ages **25-64**
- ▶ College-educated
- ▶ In top **25%** of household income per age group in each market
- ▶ Report significant media consumption and engagement in public policy and business news



Mass Population

All population not
including informed public

Represents **83%** of total
global population

2020 EDELMAN TRUST BAROMETER

SAMPLE SIZE, QUOTAS AND MARGIN OF ERROR

| | General Population | | | Informed Public | | |
|--------------------------|--------------------|---------------------|---|-----------------|-----------------------------------|--|
| | Sample Size* | Quotas Set On** | Margin of Error | Sample Size* | Quotas Set On*** | Margin of Error |
| Global | 32,200 | Age, Gender, Region | +/- 0.6% total sample +/- 0.8% half sample | 6200 | Age, Education, Gender, Income | +/- 1.2% total sample +/- 1.8% split sample |
| China and U.S. | 1,150 | Age, Gender, Region | +/- 2.9% total sample +/- 4.1% half sample | 500 | Age, Education, Gender, Income | +/- 4.4% total sample +/- 6.2% split sample |
| All other markets | 1,150 | Age, Gender, Region | +/- 2.9% total sample +/- 4.1% half sample | 200 | Age, Education, Gender, Income | +/- 6.9% total sample +/- 9.8% split sample |

NOTE: Questions that afforded respondents the opportunity to criticize their government were not asked in China, Russia and Thailand.

* Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.

** In the U.K. and U.S. there were additional quotas on ethnicity.

*** In the UAE and Saudi Arabia there were additional quotas on nationality.

2020 EDELMAN TRUST BAROMETER

LANGUAGES AND INTERNET PENETRATION BY MARKET

The Edelman Trust Barometer is an online survey. In developed markets, a nationally-representative online sample closely mirrors the general population. In markets with lower levels of internet penetration, a nationally-representative online sample will be more affluent, educated and urban than the general population.

| | Languages | Internet Penetration* |
|------------------|-------------------------------|-----------------------|
| Global | - | 59% |
| Argentina | Localized Spanish | 93% |
| Australia | English | 87% |
| Brazil | Portuguese | 71% |
| Canada | English & French Canadian | 93% |
| China | Simplified Chinese | 60% |
| Colombia | Localized Spanish | 63% |
| France | French | 92% |
| Germany | German | 96% |
| Hong Kong | English & Traditional Chinese | 89% |

| | Languages | Internet Penetration* |
|---------------------|-------------------|-----------------------|
| India | English & Hindi | 41% |
| Indonesia | Indonesian | 64% |
| Ireland | English | 92% |
| Italy | Italian | 93% |
| Kenya | English & Swahili | 90% |
| Japan | Japanese | 94% |
| Malaysia | Malay | 81% |
| Mexico | Localized Spanish | 65% |
| Russia | Russian | 81% |
| Saudi Arabia | English & Arabic | 93% |

| | Languages | Internet Penetration* |
|------------------------|------------------------------|-----------------------|
| Singapore | English & Simplified Chinese | 88% |
| South Africa | English & Afrikaans | 56% |
| South Korea | Korean | 96% |
| Spain | Spanish | 93% |
| Thailand | Thai | 82% |
| The Netherlands | English & Dutch | 96% |
| UAE | English & Arabic | 98% |
| U.K. | English | 95% |
| U.S. | English | 89% |

*Data source: <http://www.internetworldstats.com/stats.htm>

2020 EDELMAN TRUST BAROMETER

HOW WE MEASURED BELIEF IN THE SYSTEM

Four dimensions were examined to determine whether or not respondents believe the system is failing them:

- 1) A **sense of injustice** stemming from the perception that society's elites have co-opted the system to their own advantage at the expense of regular people,
- 2) A **lack of hope** that the future will be better for you and your family,
- 3) A **lack of confidence** in the leaders of societal institutions to solve the country's problems, and
- 4) A **desire for** forceful reformers in positions of power that are capable of bringing about much-needed **change**.

Overall scores were calculated by taking the average of the nine item scores.

Respondents were categorized into one of three segments based their mean score:

- Those who averaged 6.00 or higher believe the **system is failing** them
- Those who averaged between 5.00 and 5.99 were labelled as **uncertain**
- Those who averaged less than 5.00 believe the **system is working**

Respondents were asked:

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**".

Sense of Injustice Items

"The elites who run our institutions are out of touch with regular people" POP_MDCr8

"The elites who run our institutions are indifferent to the will of the people" POP_MDCr1

"As regular people struggle just to pay their bills, the elites are getting richer than they deserve" POP_MDCr2

"The system is biased against regular people and in favor of the rich and powerful" POP_MDCr3

Lack of Hope Items

"My hard work will be rewarded" (reverse scored) POP_MDCr18

"My children will have a better life than I do" (reverse scored) POP_MDCr19

"The country is moving in the right direction" (reverse scored) POP_MDCr20

Lack of Confidence Items

"I do not have confidence that our current leaders will be able to address our country's challenges" POP_MDCr10

Desire for Change Items

"We need forceful reformers in positions of power to bring about much-needed change" POP_MDCr9

2020 EDELMAN TRUST BAROMETER

HOW WE PLOTTED THE INSTITUTIONAL COMPETENCE AND ETHICS SCORES

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 so that the dividing line between more competent and less competent institutions crossed the Y-axis at zero.

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 agent of positive change | Completely ineffective agent of positive change |
| Honest | Honest and fair | Corrupt and biased |
| Vision | Has a vision for the future that I believe in | Does not have a vision for the future that I believe in |
| Fairness | Serves the interests of everyone equally and fairly | Serves the interests of only certain groups of people |

The plot of trusted institutions: The version of the plot under conditions of trust (the smaller blue triangle) was calculated in exactly the same way as described above. The only difference was that the competence and ethics scores were calculated only among those who said they trusted that institution to do what is right (i.e., they gave that institution a top 4-box rating on the general trust question).

EDELMAN TRUST MANAGEMENT

HOW WE MEASURED THE IMPORTANCE OF COMPETENCE AND ETHICS IN DETERMINING TRUST IN A COMPANY

The data used was collected across the 12 monthly waves of the 2019 Edelman Trust Management brand tracking study conducted in Germany, the U.K. and the U.S among 23,000+ respondents. For this analysis, we looked at 40 global companies that were common across all three markets.

For each company, respondents were asked whether they trusted it or not to do what is right. They were then asked to evaluate each company across the four trust subdimensions – ability, integrity, dependability and purpose. Ability defined the competence dimension while integrity, dependability and purpose were rolled up to define the ethics dimension.

An ANOVA was performed to measure the proportion of the variance in company trust each of the four subdimensions explained. The data shown on the slide represents the percentage of the total variance explained by all four subdimensions together accounted for by each of the individual subdimensions separately.

Respondents were asked:

Please indicate to what extent you agree or disagree with the following statements using a nine-point scale where one means it is “**disagree strongly**” and nine means it is “**agree strongly**”.

COMPETENCE DIMENSION:

ABILITY: [COMPANY] is good at what it does

ETHICS DIMENSION:

INTEGRITY: [COMPANY] is honest

DEPENDABILITY: [COMPANY] keeps its promises

PURPOSE: [COMPANY] is trying hard to have a positive impact on society

2019 EDELMAN TRUST BAROMETER SPECIAL REPORT: IN BRANDS WE TRUST

HOW WE MEASURED BELIEF-DRIVEN BUYING

We classified respondents into three **belief-driven buyer segments** based on their responses to the scale questions:

- 1) **Leaders:** Have strongly-held, passionate beliefs. The brands they buy are one important way they express those beliefs.
- 2) **Joiners:** Depending on the issue and the brand, they will change their buying behavior based on the brand's stand.
- 3) **Spectators:** Rarely buy on belief or punish brands that take a stand.

Respondents were categorized into one of the three segments based their overall mean score across the six scale items:

- Those who averaged 6.00 or higher were categorized as **Leaders**
- Those who averaged between 5.00 and 5.99 were categorized as **Joiners**
- Those who averaged less than 5.00 were categorized as **Spectators**

Respondents were asked:

Please indicate how much you agree or disagree with the following statements using a nine-point scale where one means it is “**disagree strongly**” and nine means it is “**agree strongly**”.

- Even if a company makes the product that I like most, I will not buy it if I disagree with the company's stand on important social issues
- I have bought a brand for the first time for the sole reason that I appreciated its position on a controversial societal or political issue
- I have stopped buying one brand and started buying another because I liked the politics of one more than the other
- I have strong opinions about many societal and political issues. The brands I choose to buy and not buy are one important way I express those opinions
- If a brand offers the best price on a product, I will buy it even if I disagree with the company's stand on controversial social or political issues [reversed scored]
- I have stopped buying a brand solely because it remained silent on a controversial societal or political issue that I believed it had an obligation to publicly address

2020 EDELMAN TRUST BAROMETER

HOW WE CALCULATED THE TRUST GAINS ASSOCIATED WITH IMPROVED PERFORMANCE

Respondents were asked to evaluate the performance of each of the four institutions against 12 expectations. These performance scores were then used to predict trust in the institution using a regression analysis. The results of regression allowed us to identify the percentage point lift in trust associated with the institution doing each individual behavior well or very well.

Next, we looked at the percentage of respondents who currently rate an institution as doing a given behavior well, identifying the five behaviors each of the institutions scored the lowest on.

For each of these five behaviors that the regression determined were significant predictors of trust, we subtracted the percentage of people who currently felt the institution was doing them well from 100%. This gave us a measure of the unrealized potential for performance gain. That percentage was then multiplied by the percentage point lift in trust associated with every respondent rating the institution as doing that behavior well. This yielded an unrealized trust gain for that behavior. These unrealized trust gains were added up across the five behaviors to yield an overall trust gain associated with the institution successfully addressing its five biggest challenges.

Respondents were asked:

How well do you feel [INST] is currently doing each of the following? Please indicate your answer using the 5-point scale below where 1 means the institution is “failing at this” and 5 means the institution is “doing this very well”

Example List of Business Behaviors

1. Driving the economic prosperity of our country
2. Being an engine of innovation and scientific advancement
3. Ensuring that there are plenty of good job opportunities available that pay a decent wage
4. Contributing to the improvement of the communities in which they do business
5. Fostering diversity, inclusion, dignity and mutual respect in the workplace
6. Meeting and exceeding their customers' expectations
7. Investing in their employees' professional development, including offering training and education that helps them develop new skills for a rapidly changing world
8. Forging strong working partnerships with government to develop solutions to our country's problems
9. Forging strong working partnerships with NGOs to develop solutions to our country's problems
10. Dealing fairly and ethically with their partners and suppliers
11. Generating long-term financial benefits and value for their owners and shareholders
12. Embracing sustainable practices across their business

2020 EDELMAN TRUST BAROMETER TEAM



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