Trust in Mexico

Edelman Trust Barometer 2020

Edelman

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).

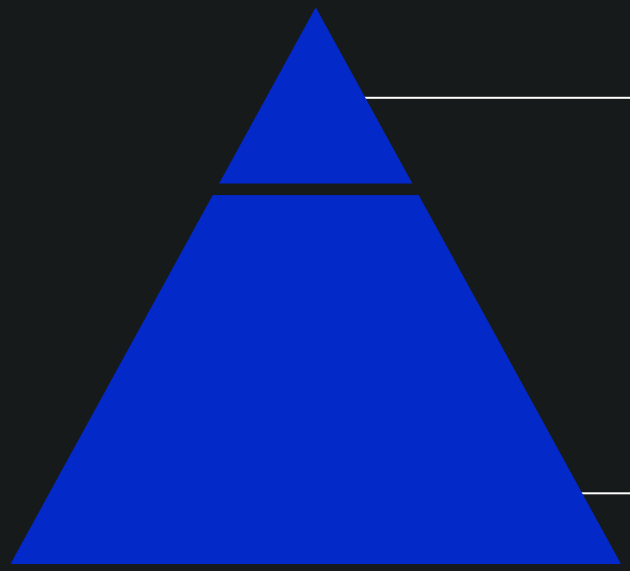
Gen Z MOE: 28-market = +/- 1.5% (N=4,310)
Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

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

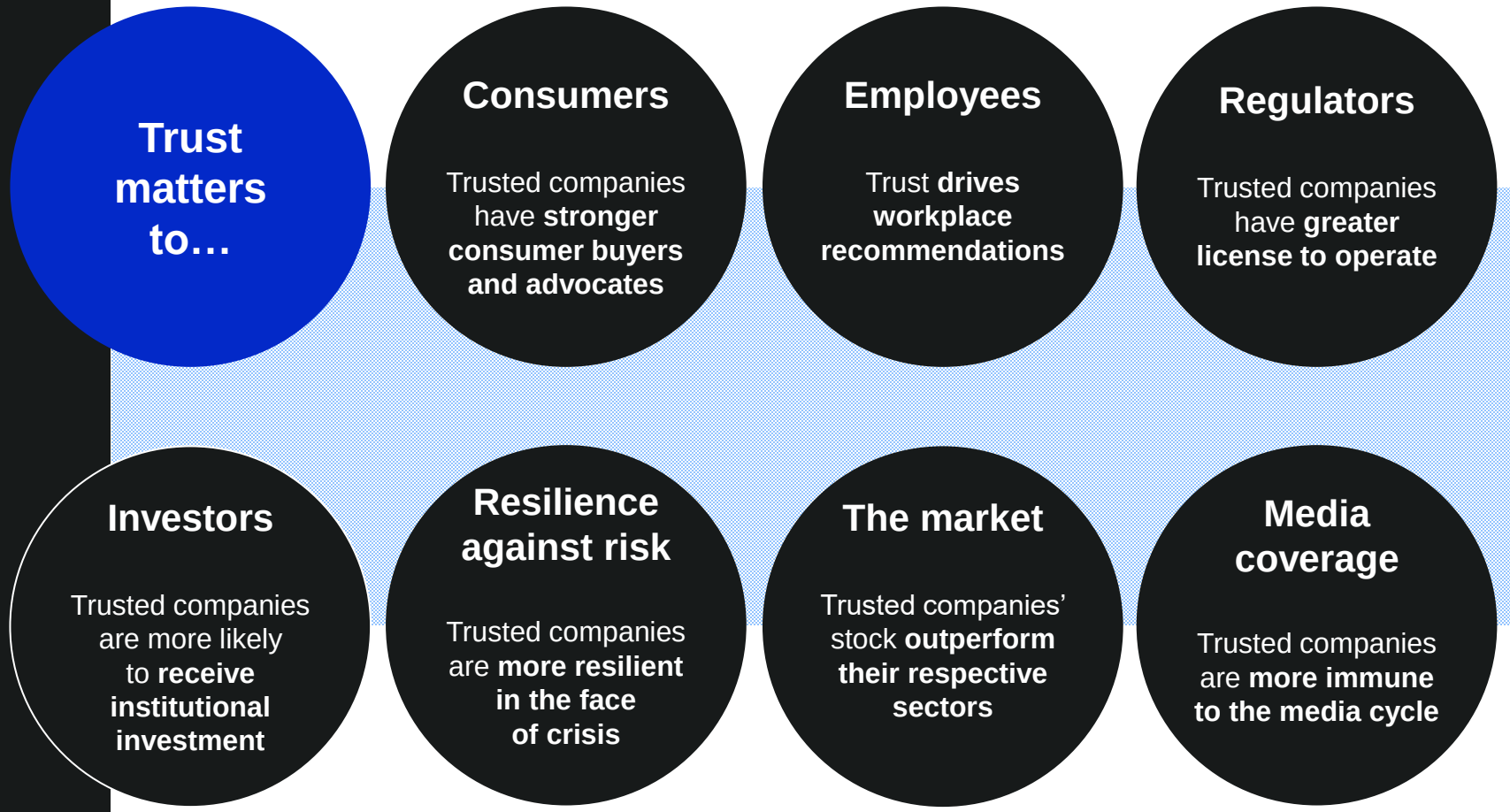
All population not including informed public

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

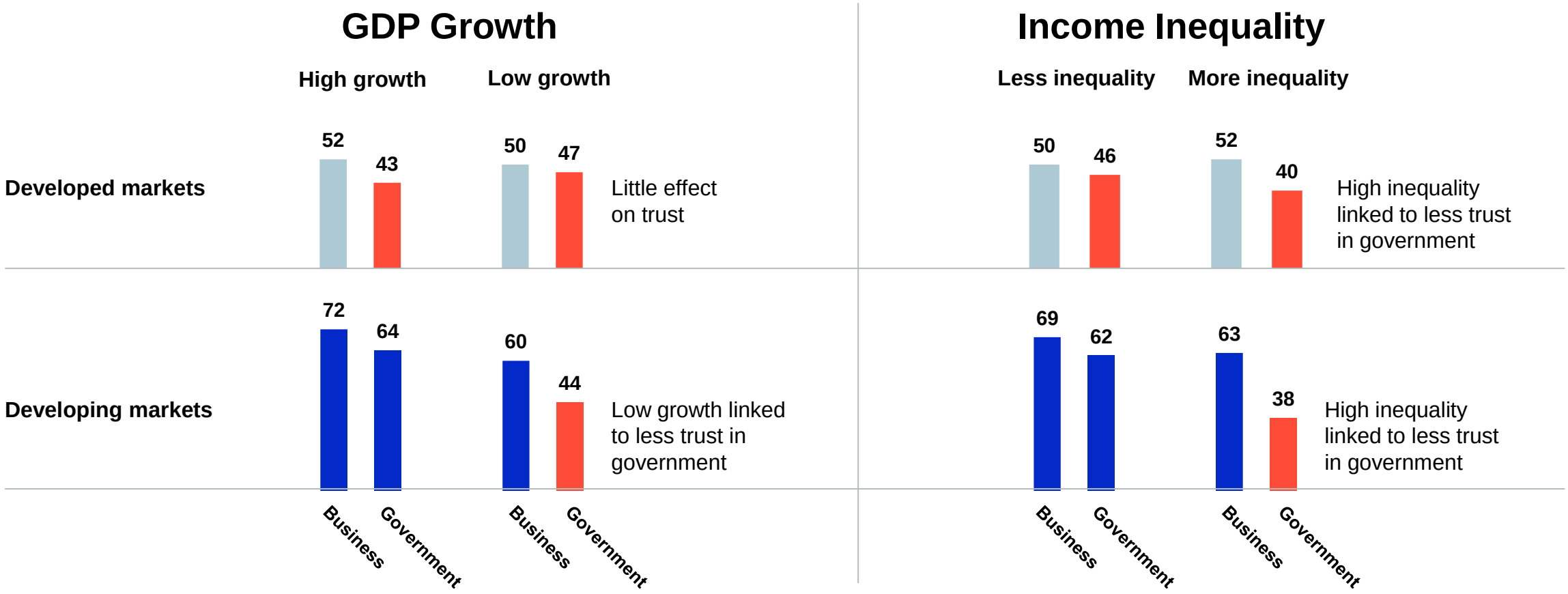


20 YEARS OF TRUST

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.

GROWING SENSE OF INEQUITY

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

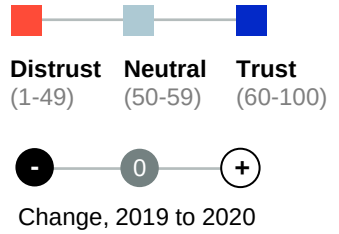
2020 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 26-mkt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

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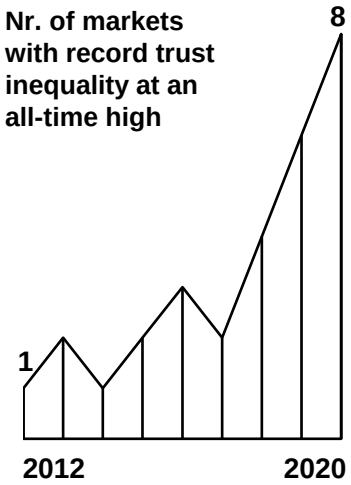
2020 Informed public		2020 Mass population		Trust gap
65	Global 28	51	Global 28	14
90	China	77	China	13
87	India	74	India	13
82	Indonesia	70	Indonesia	12
80	Saudi Arabia	64	UAE	11
78	Thailand	62	Thailand	16
75	UAE	60	Singapore	11
71	Mexico	59	Saudi Arabia	21
71	Singapore	58	Malaysia	10
68	Australia	58	Mexico	13
68	Malaysia	57	The Netherlands	10
67	Canada	56	Kenya	2
67	The Netherlands	52	Colombia	10
64	Germany	51	Canada	16
64	Italy	49	Brazil	11
63	France	49	Hong Kong	5
62	Colombia	49	S. Korea	1
60	Argentina	48	Argentina	12
60	Brazil	48	Italy	16
60	Ireland	45	Australia	23
59	Spain	45	U.S.	8
58	Kenya	44	Germany	20
57	U.K.	44	S. Africa	5
54	Hong Kong	43	Ireland	17
53	Japan	42	France	21
53	U.S.	42	Japan	11
50	S. Korea	42	Spain	17
49	S. Africa	39	U.K.	18
41	Russia	27	Russia	14

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

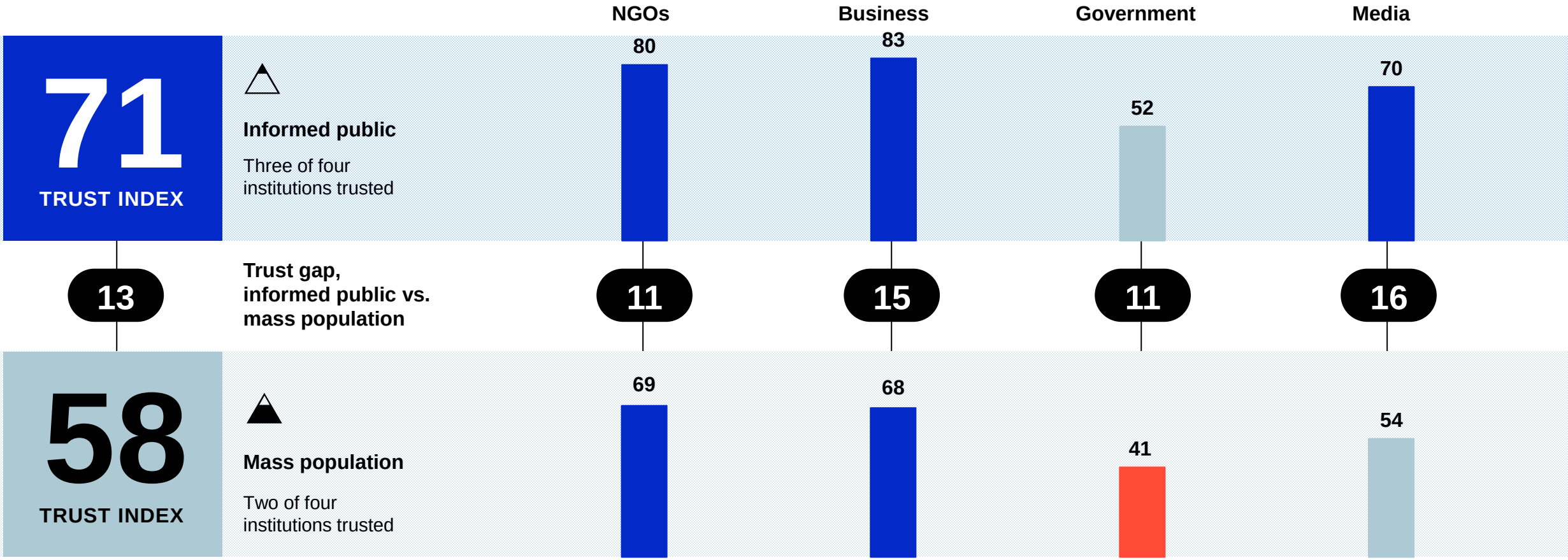
Record trust inequality

Nr. of markets with record trust inequality at an all-time high



TWO DIFFERENT TRUST REALITIES

Percent trust in Mexico

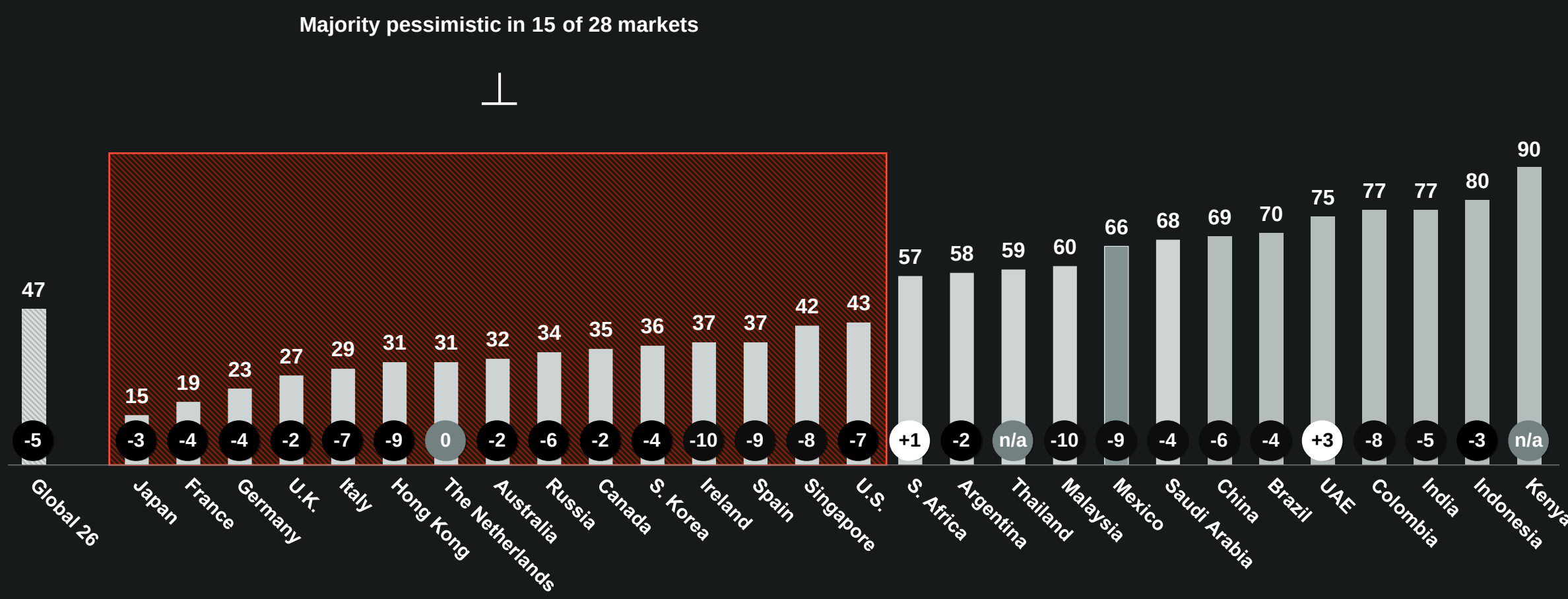


2020 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, Mexico.

PESSIMISTIC ABOUT ECONOMIC PROSPECTS

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

- 0 + Change, 2019 to 2020



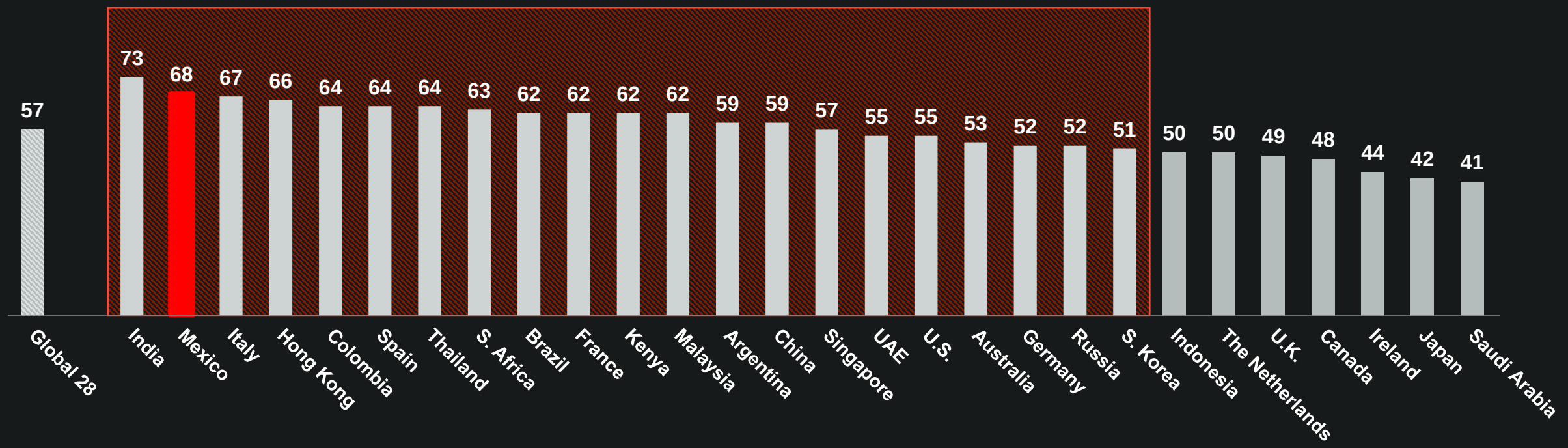
2020 Edelman Trust Barometer. CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time?
5-point scale; top 2 box, better off. General population, 26-mkt avg.

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



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.

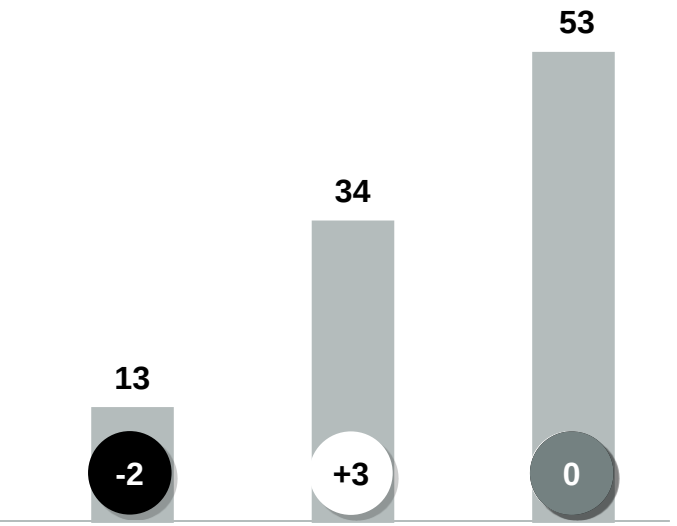
CAPITALISM UNDER FIRE

Percent in Mexico who agree

- 0 + Change, 2019 to 2020

How true is this for you?

Desire for change	**88**
Sense of injustice	**80**
Lack of confidence	**73**
Lack of hope	**21**



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

56%

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, Mexico. 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, Mexico.

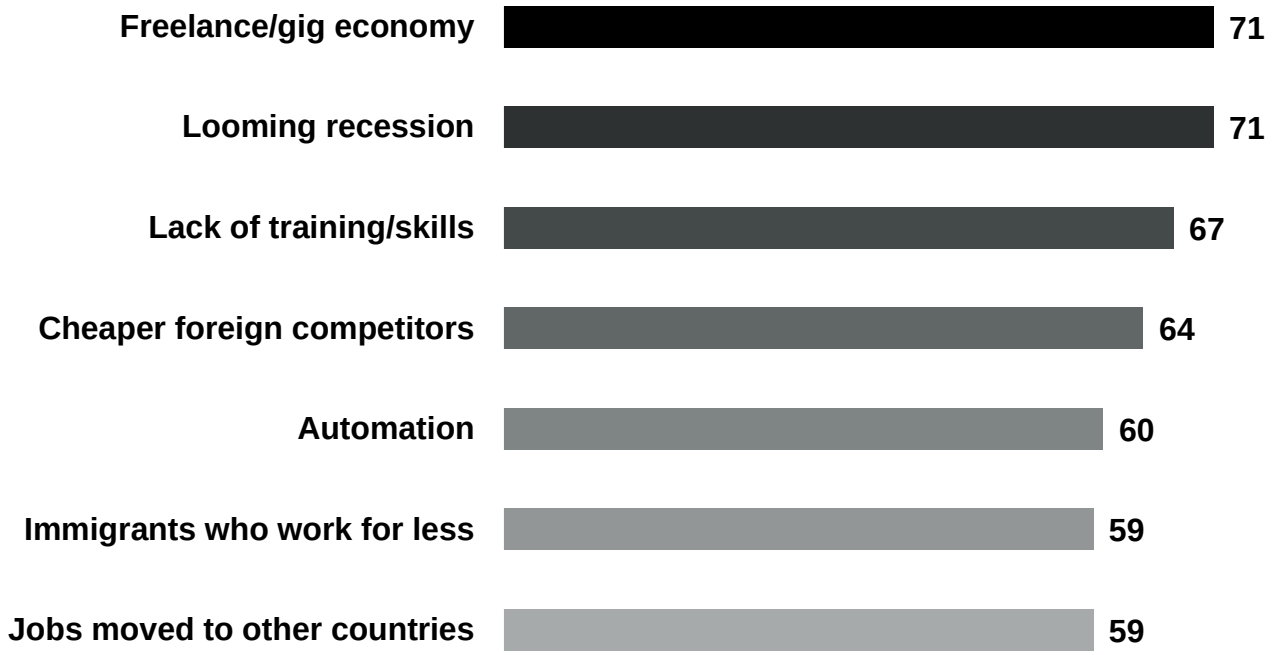
UNPREPARED FOR THE FUTURE

WORRY ABOUT THE FUTURE OF WORK

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

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

88%



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, Mexico, among those who are employed (Q43/1).

WORRY TECHNOLOGY IS OUT OF CONTROL

Percent in Mexico who agree

The pace of change in technology is **too fast**

68%

I worry technology will make it impossible to know if **what people are seeing or hearing is real**

72%

Government **does not understand emerging technologies** enough to regulate them effectively

68%

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. Mexico. 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. Mexico. 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). Mexico. 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

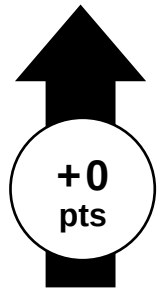
Percent in Mexico who agree

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

69%

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

80%

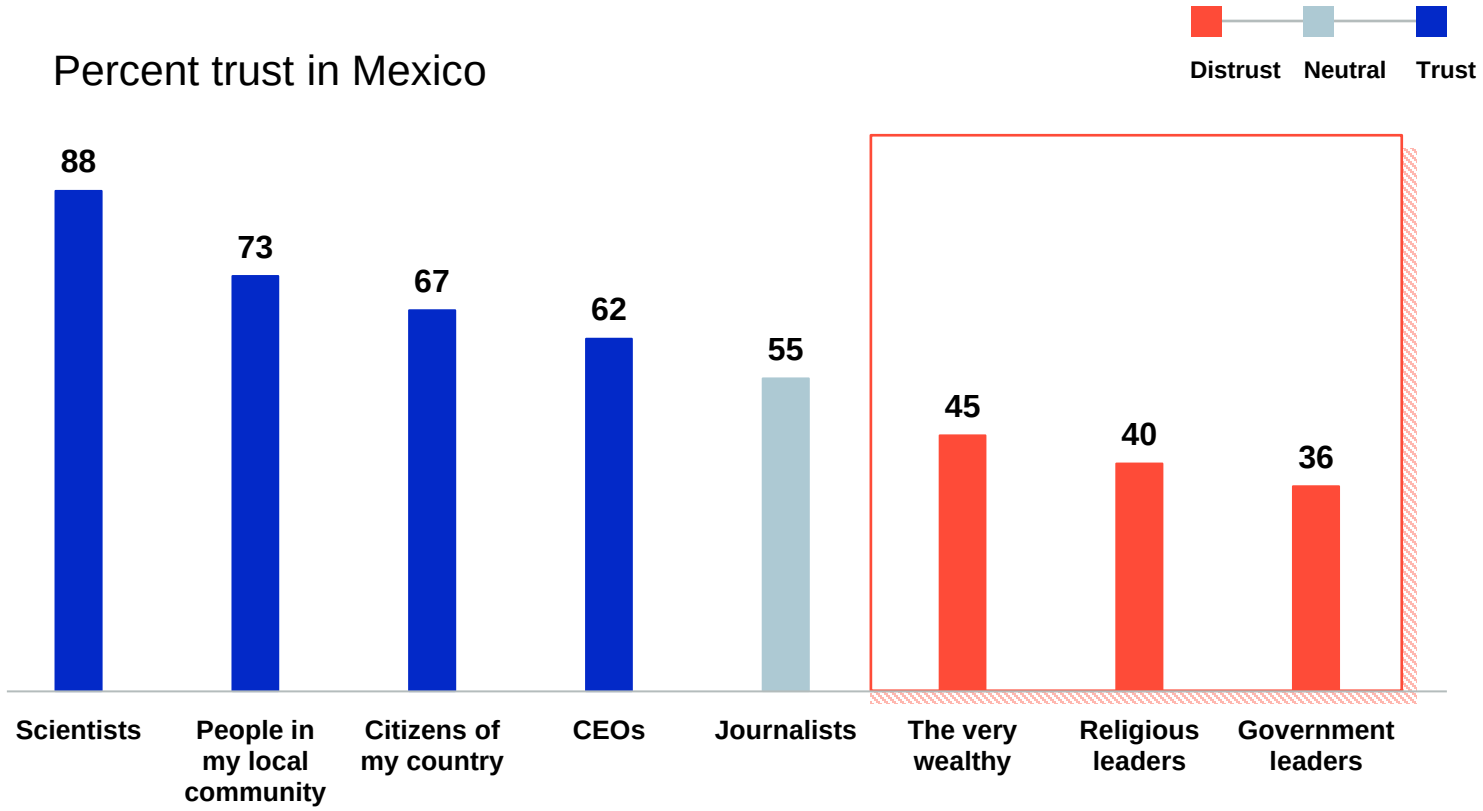


Change, 2018 to 2020

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**”

73%



2020 Edelman Trust Barometer. 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. 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. General population, Mexico.

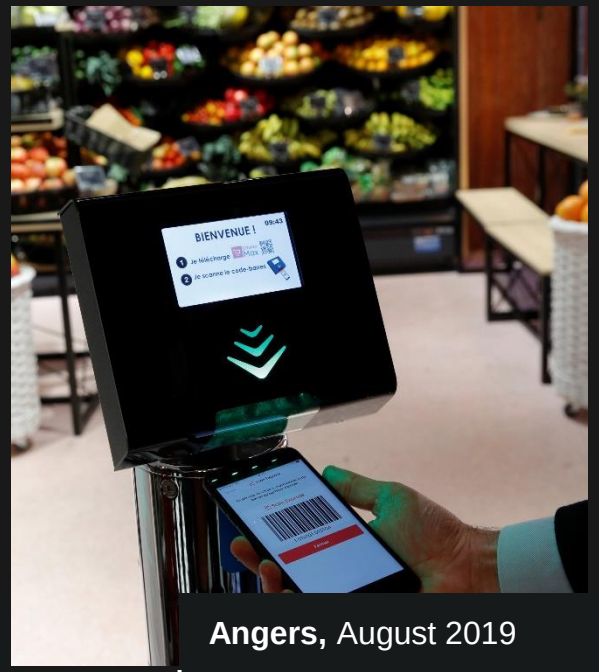
TAKING THE FUTURE INTO THEIR OWN HANDS

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

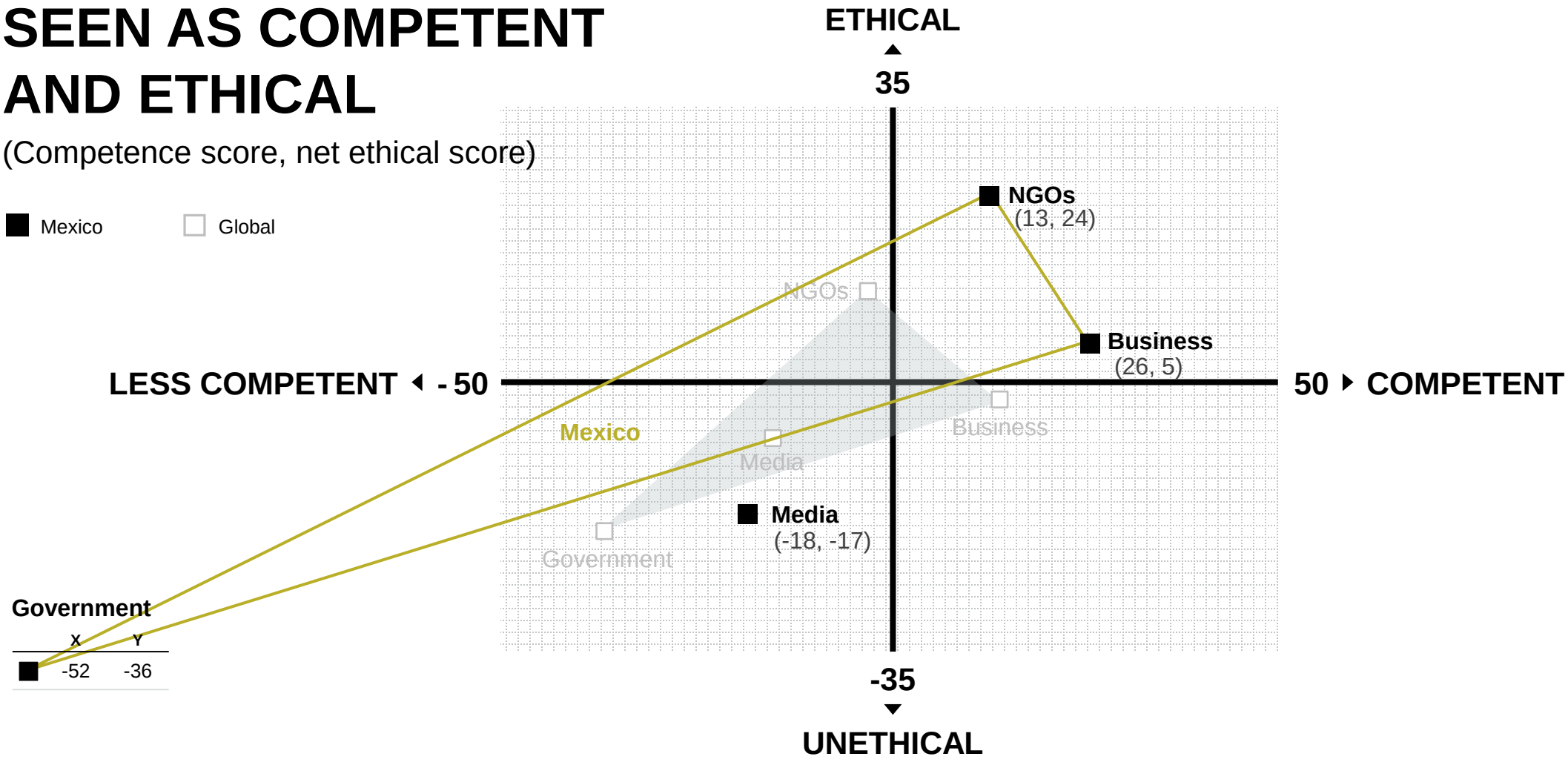
Oregon, December 2019

Nike employees protest company's treatment of women

TRUST IS BUILT ON COMPETENCE AND ETHICS

NGOS AND BUSINESS SEEN AS COMPETENT AND ETHICAL

(Competence score, net ethical score)

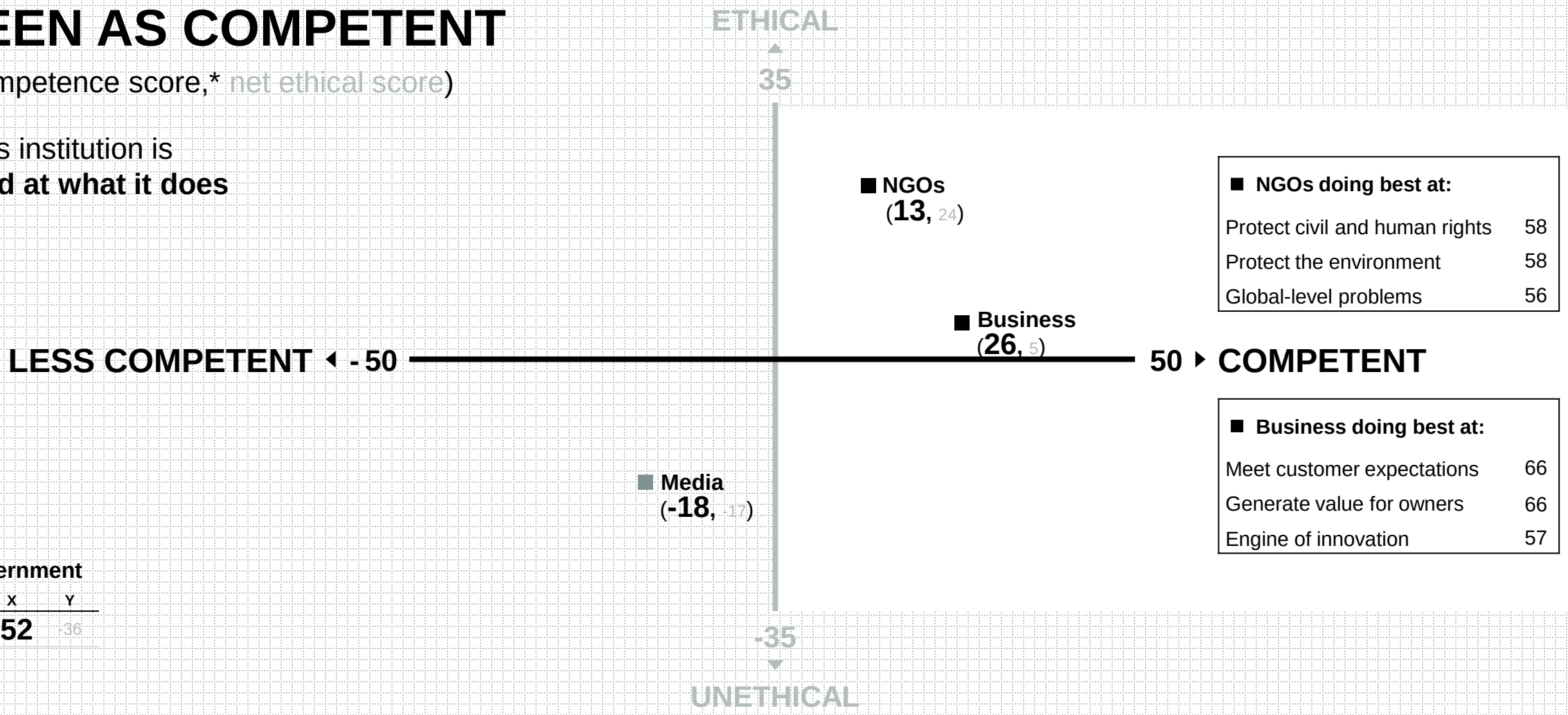


2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D _[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, 25-mkt avg and Mexico. 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**



NGOs doing best at:	
Protect civil and human rights	58
Protect the environment	58
Global-level problems	56

Business doing best at:	
Meet customer expectations	66
Generate value for owners	66
Engine of innovation	57

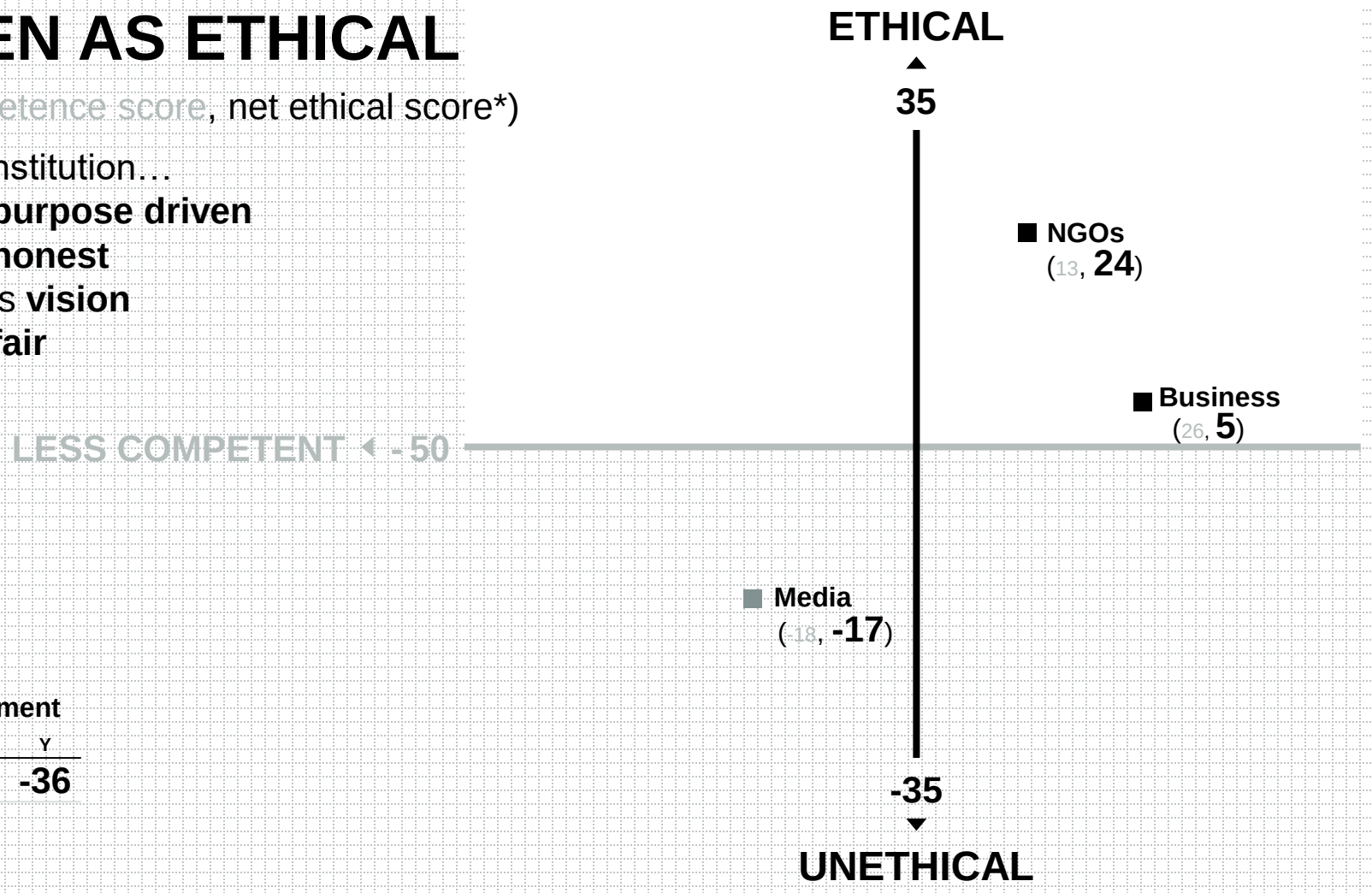
2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D _[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. PER_[INSTITUTION]. 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, Mexico. 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 ETHICAL

(Competence score, net ethical score*)

*This institution…

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



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Business doing best at:	
Meet customer expectations	66
Generate value for owners	66
Engine of innovation	57

Government

	X	Y
	-52	**-36**

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, Mexico. 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 FAIR

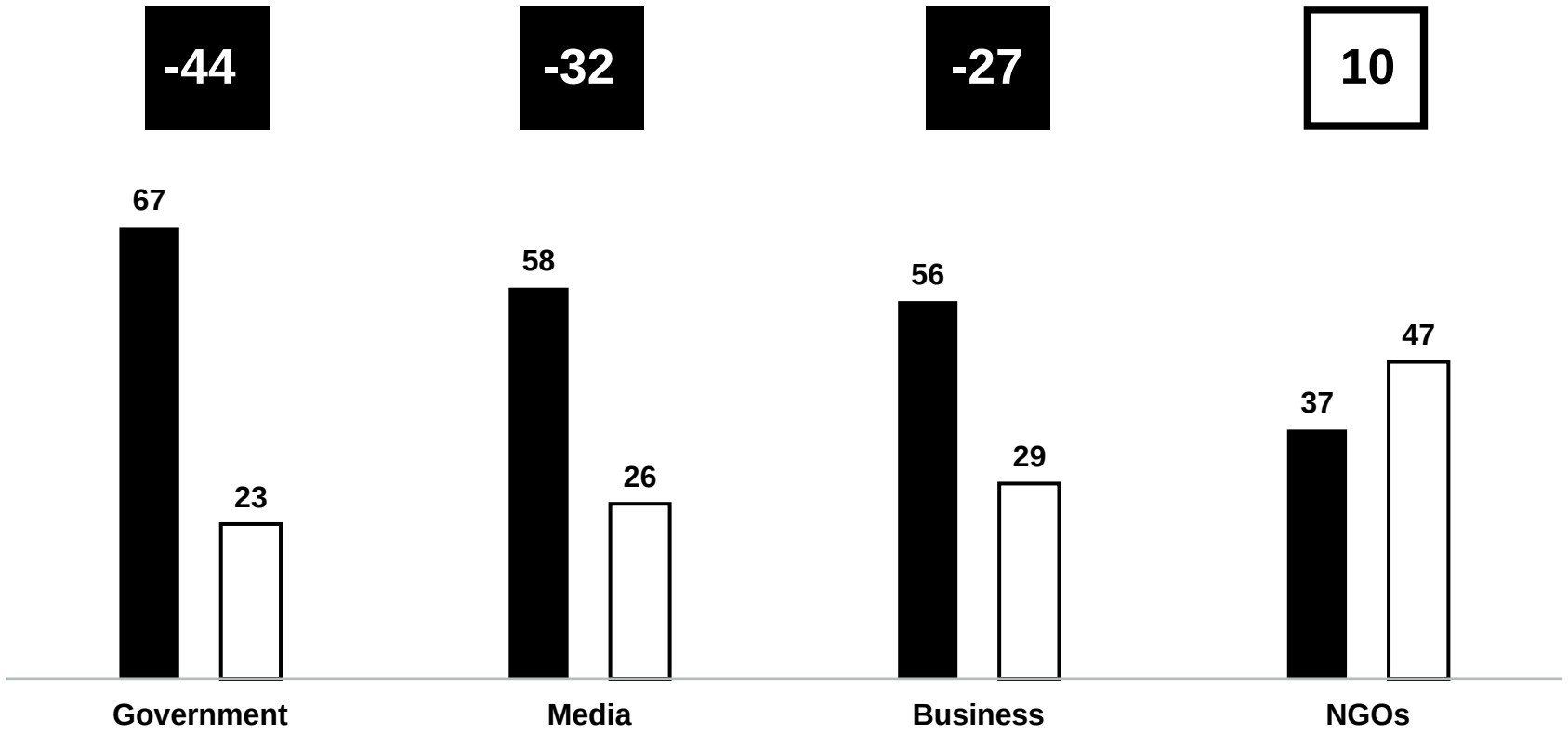
Percent in Mexico who cite each as a reason they trust or distrust each institution

This institution…

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

Serves the **interests of only the few**

Serves the **interests of everyone equally and fairly**



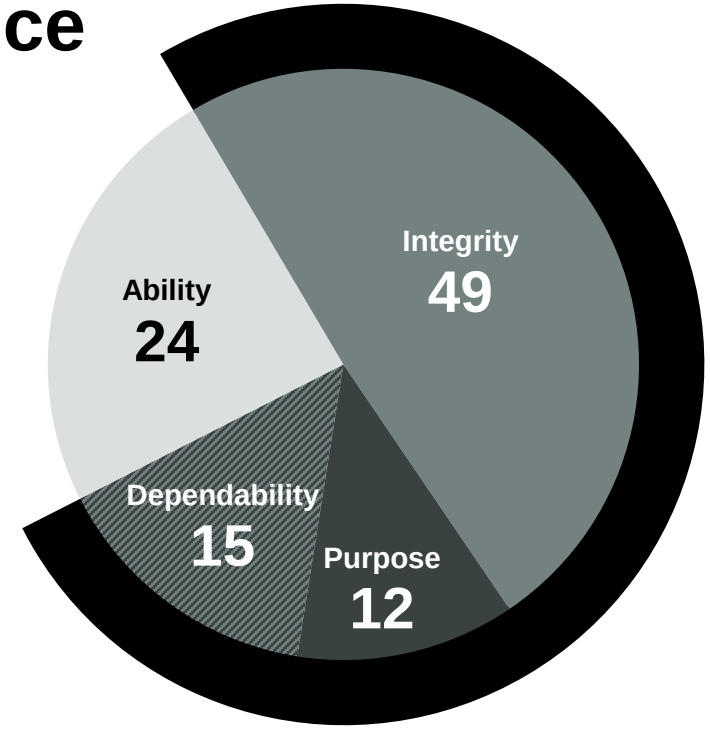
2020 Edelman Trust Barometer. Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point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

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

2019 Edelman Trust Management Tracking Study. U.S., U.K. and German general population data, collected between January and December of 2019, based on 40 major companies.

BUSINESS: CATALYST FOR CHANGE

SERVE THE INTERESTS OF ALL STAKEHOLDERS

Percent in Mexico who ranked each group as most important

87%

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

Percent in Mexico who agree

81%

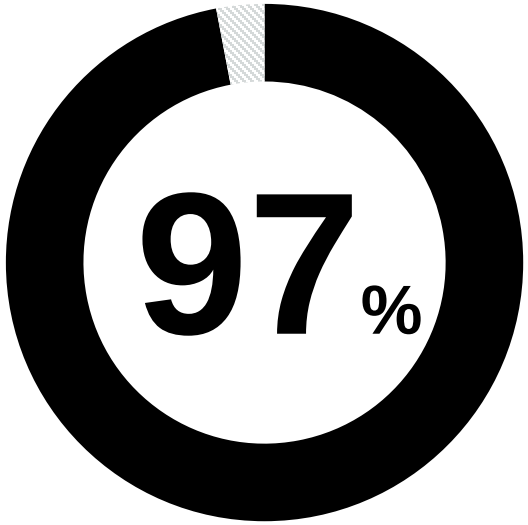
a company can take actions that both increase profits and improve conditions in communities where it operates

2020 Edelman Trust Barometer. PPL_RNK. Please rank the following four groups of people in terms of their importance to a company achieving long-term success. Give the most important group a rank of 1 and the least important a rank of 4. Stakeholders is a net of "Communities," "Customers," and "Employees". 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, Mexico.

CEOS MUST LEAD

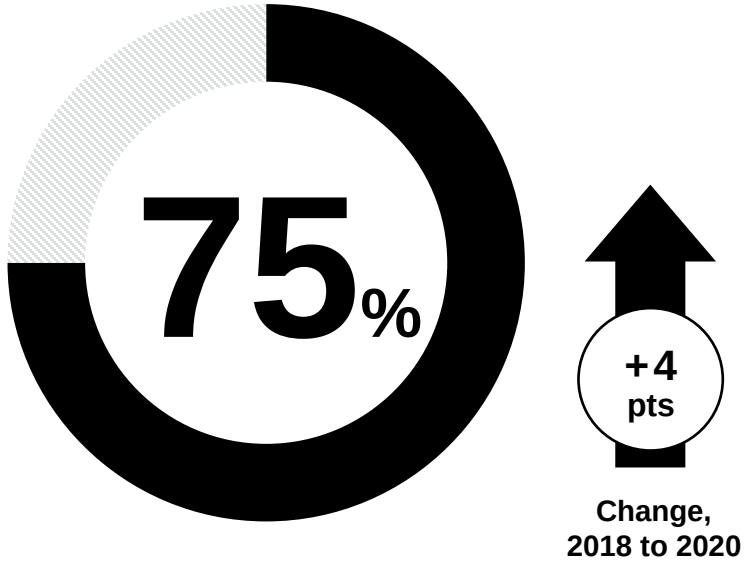
Percent in Mexico who agree

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



Training for jobs of the future	92
Automation's impact on jobs	91
Income inequality	90
Ethical use of tech	89
Climate change	85
Diversity	84
Immigration	74

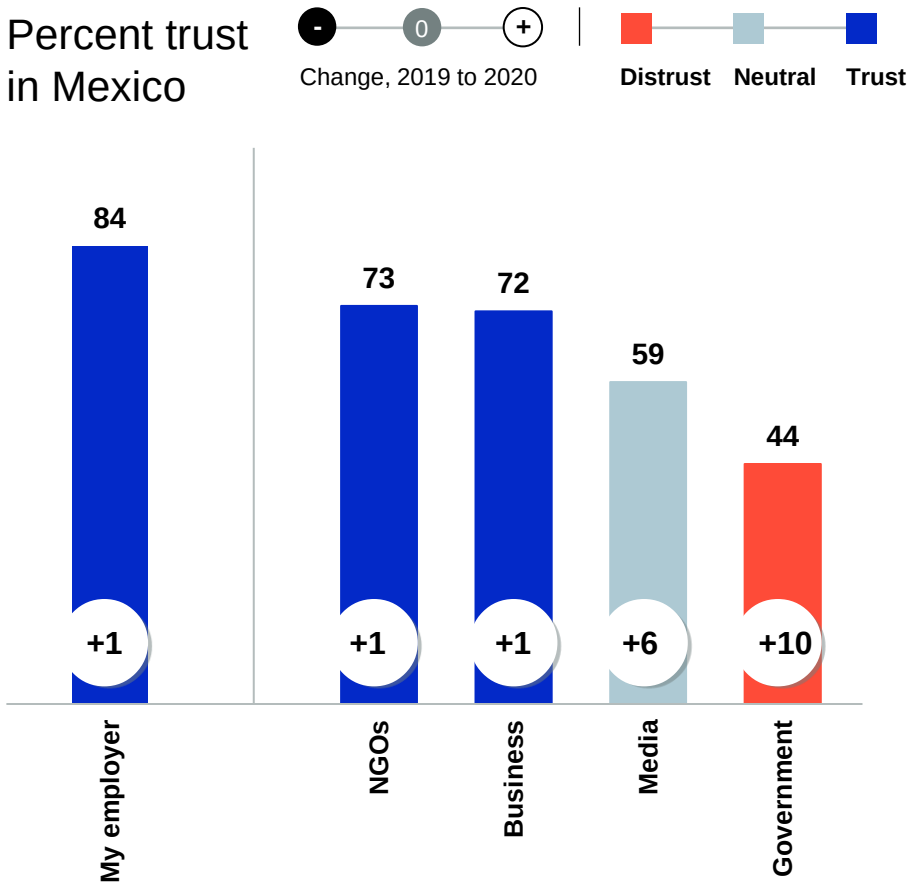
CEOs should take the lead on change rather than waiting for government to impose it



2020 Edelman Trust Barometer. 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? 9-point scale; top 4 box, important. Question asked of those who are an employee (Q43/1). Issues is a net of codes 1-7. General population, Mexico. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Mexico.

TRUST IS LOCAL:
EMPLOYEES EXPECT TO BE HEARD

Percent trust in Mexico



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

82%

Opportunity to **shape the future** of society

83%

Employees **included in planning**

2020 Edelman Trust Barometer. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? 3-point scale; sum of codes 1 and 2, important. Question asked of those who are an employee (Q43/1). TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is. 9-point scale; top 4 box, trust. "Your employer" asked of those who are an employee (Q43/1). General population, Mexico.

CONSUMERS EXPECT BRANDS TO ACT

Percent of customers who are belief-driven buyers

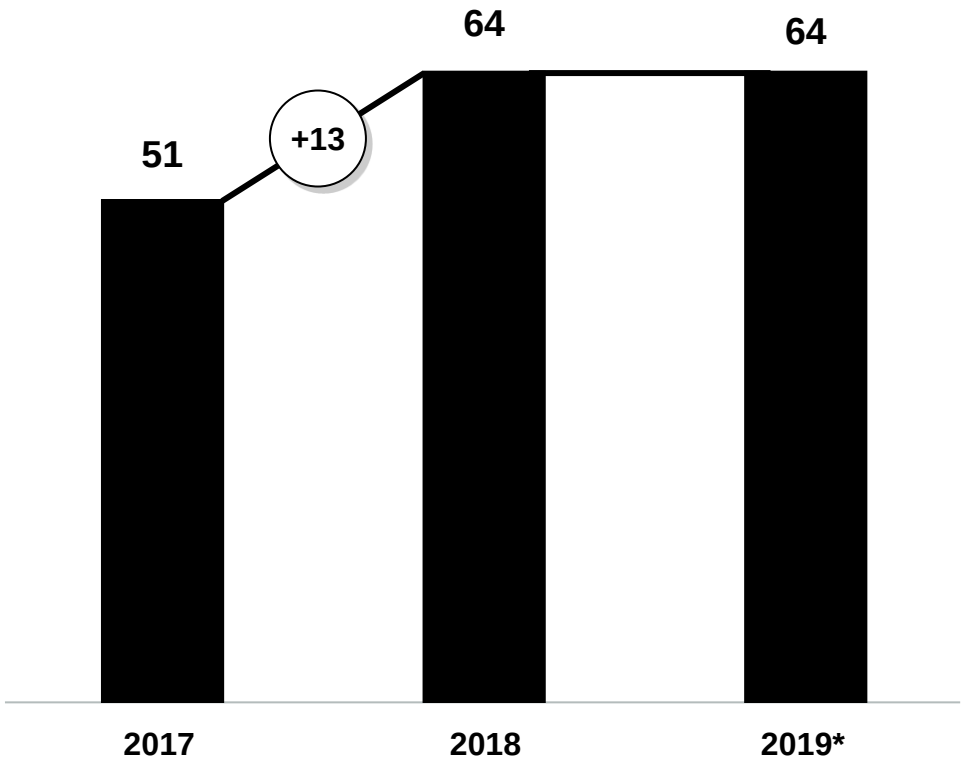
- 0 + Change, 2017 to 2018

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

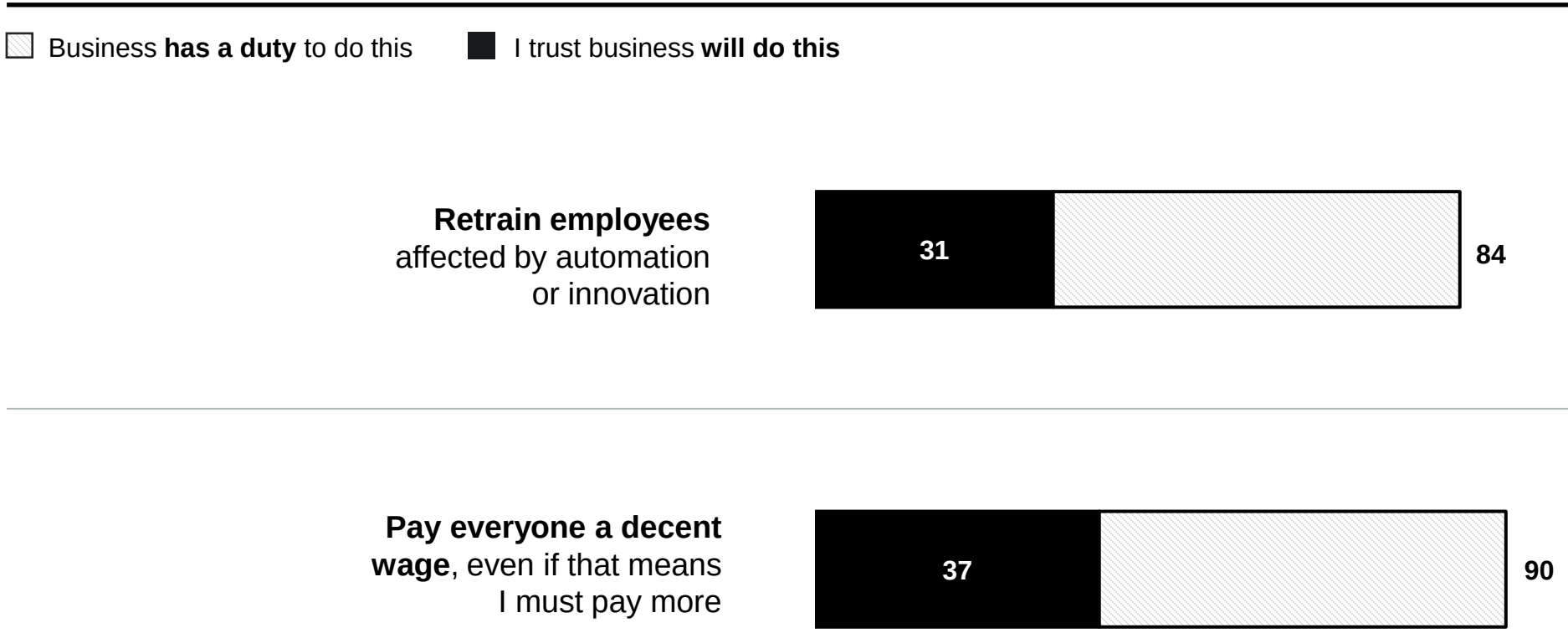
a brand based on its stand on societal issues

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 Mexico who agree



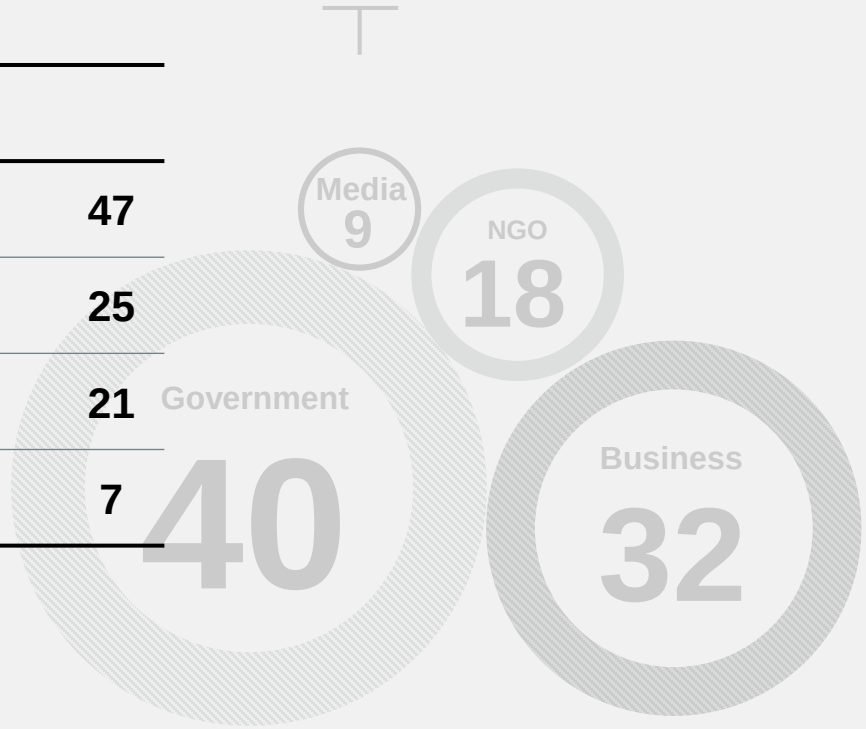
2020 Edelman Trust Barometer. CMP_DUT. For each of the actions below, please indicate whether you believe that this is something that companies have a duty to do, but you do/do not trust that they will ever follow through and consistently do it. 3-point scale; sum of codes 2 and 3, have a duty; code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

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)

Protect workers in the **gig economy**

In Mexico	
Business	**47**
Government	**25**
NGO	**21**
Media	**7**



Workforce retraining necessary as a result of automation

In Mexico	
Business	**55**
Government	**21**
NGO	**17**
Media	**7**

2020 Edelman Trust Barometer. INS_ADD. For each of the challenges described below, please indicate whether you trust business, government, media or NGOs the most to address that challenge and develop workable solutions. Question asked of half of the sample. General population, 28-mkt avg (in background graphic) and Mexico.

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

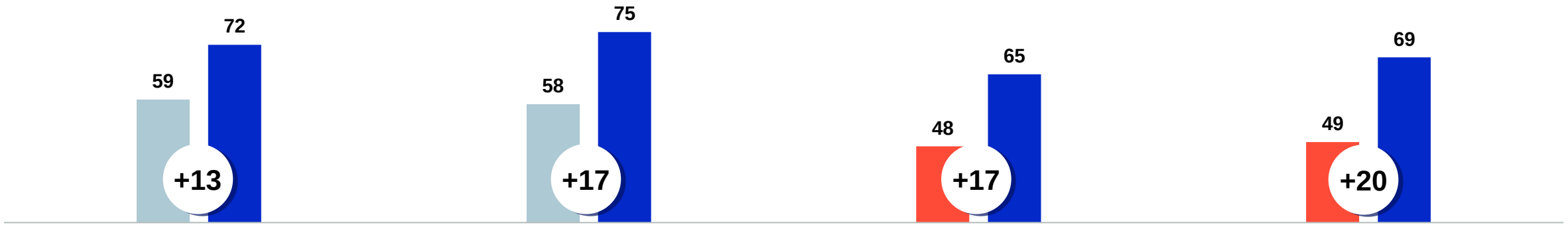
Distrust Neutral Trust

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 MEXICO

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

NGOs	
Avoid becoming politicized	46
Expose corruption	46
Partner with government	**47**
Transparency about funding	47
Poverty, illiteracy, disease	48

Business	
Jobs that pay a decent wage	40
Partner with NGOs	**42**
Partner with government	**42**
Invest in employee training	48
Contribute to communities	48

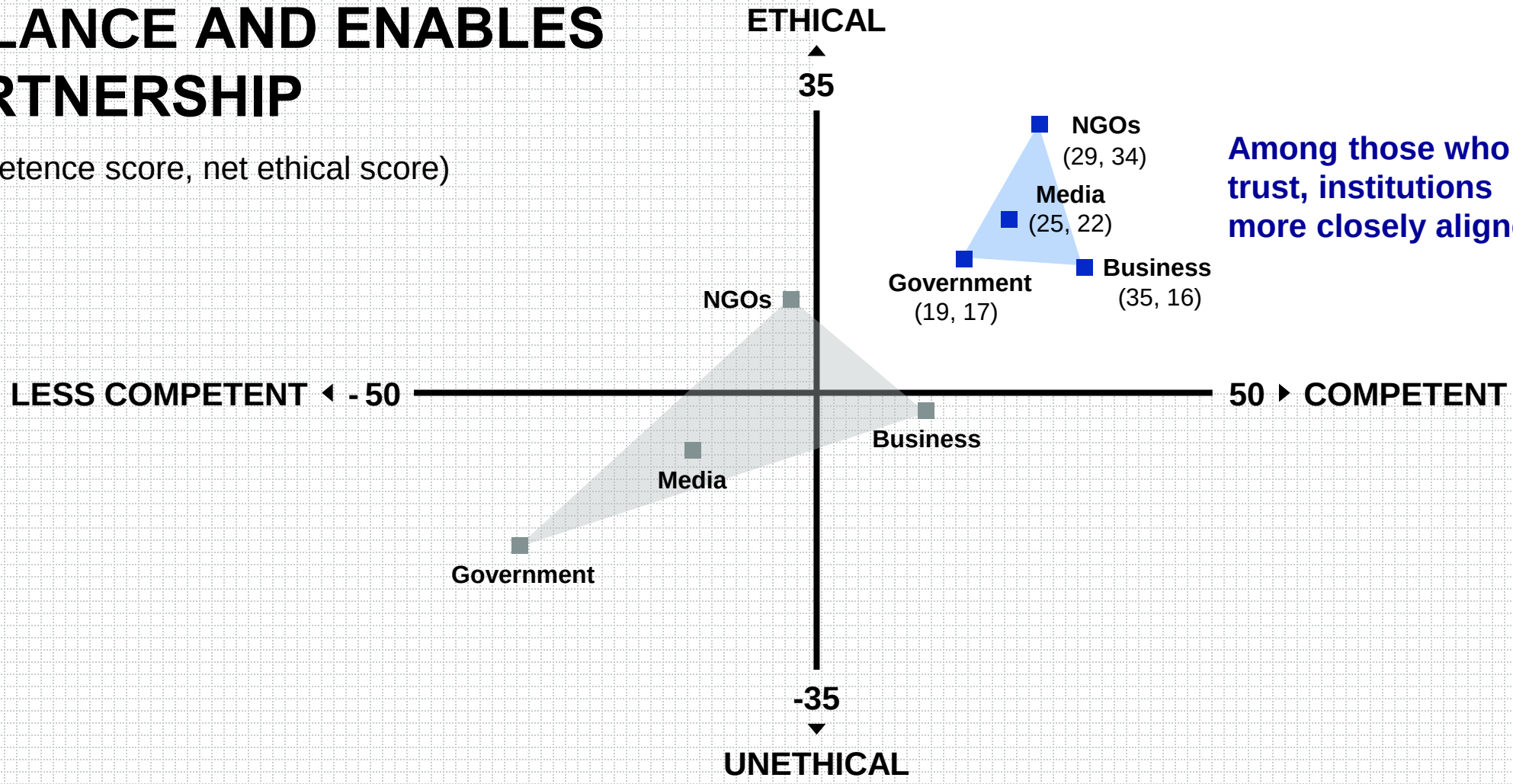
Government	
Maintain law and order	24
Reduce partisanship	26
Education	28
Protect civil and human rights	29
Partner with NGOs	**30**

Media	
Being objective	35
Keep social media clean	35
Information quality	36
Important vs sensationalized	37
Exposing corruption	38

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, Mexico. Data not collected in China, Russia and Thailand.

TRUST RESTORES BALANCE AND ENABLES PARTNERSHIP

(Competence score, net ethical score)

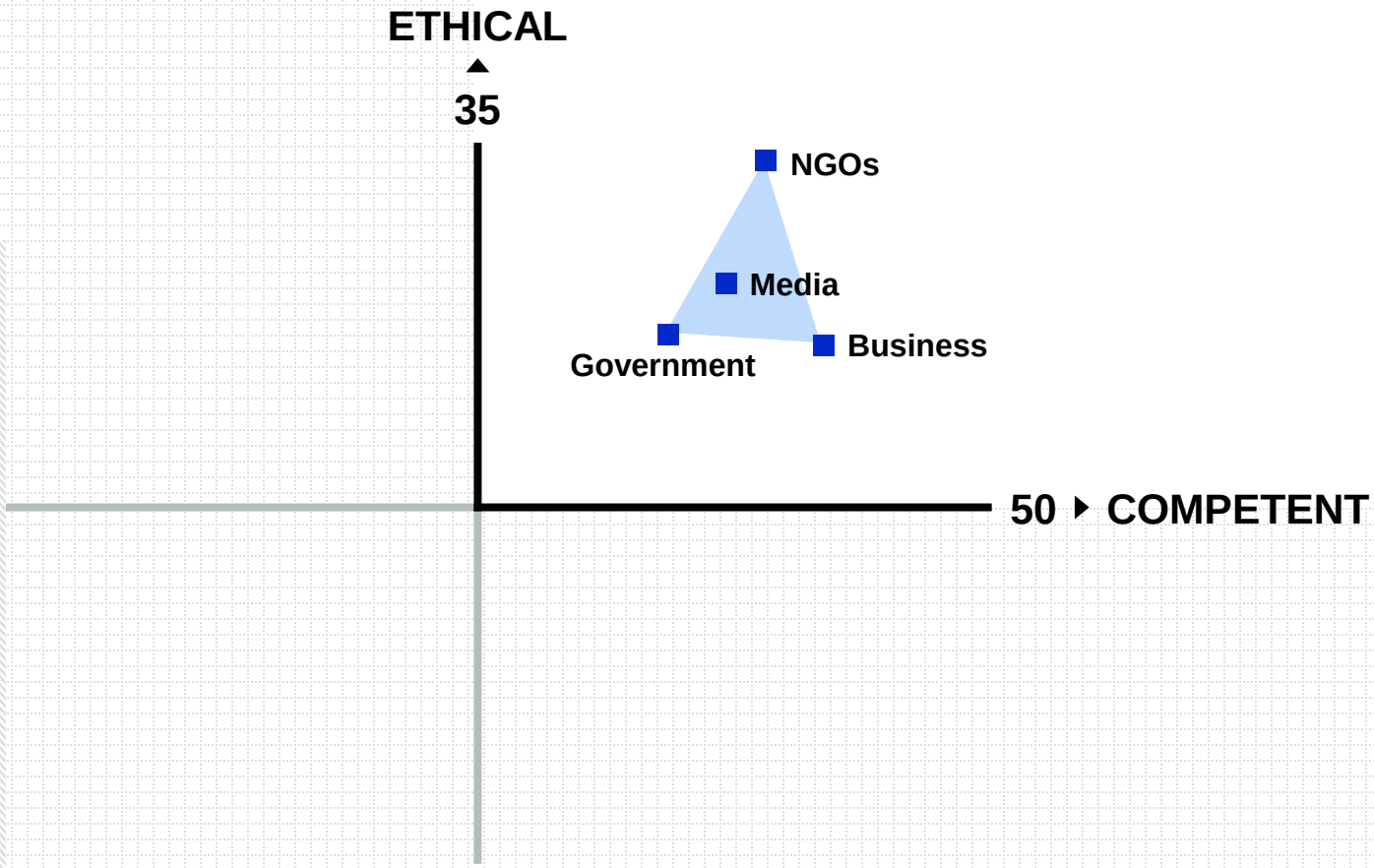


Among those who trust, institutions more closely aligned

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



SUPPLEMENTAL DATA

2020 Edelman Trust Barometer

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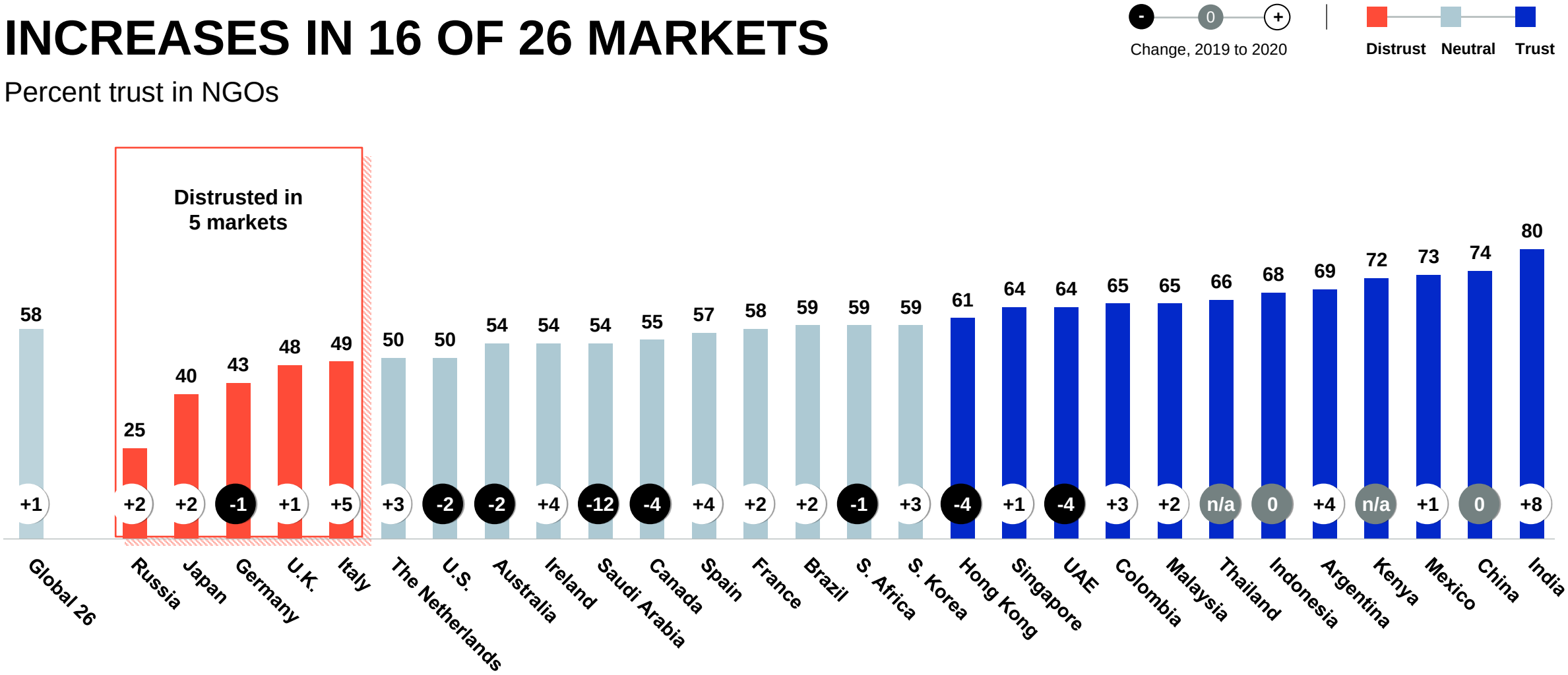
Supplemental Data

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

TRUST IN NGOS INCREASES IN 16 OF 26 MARKETS

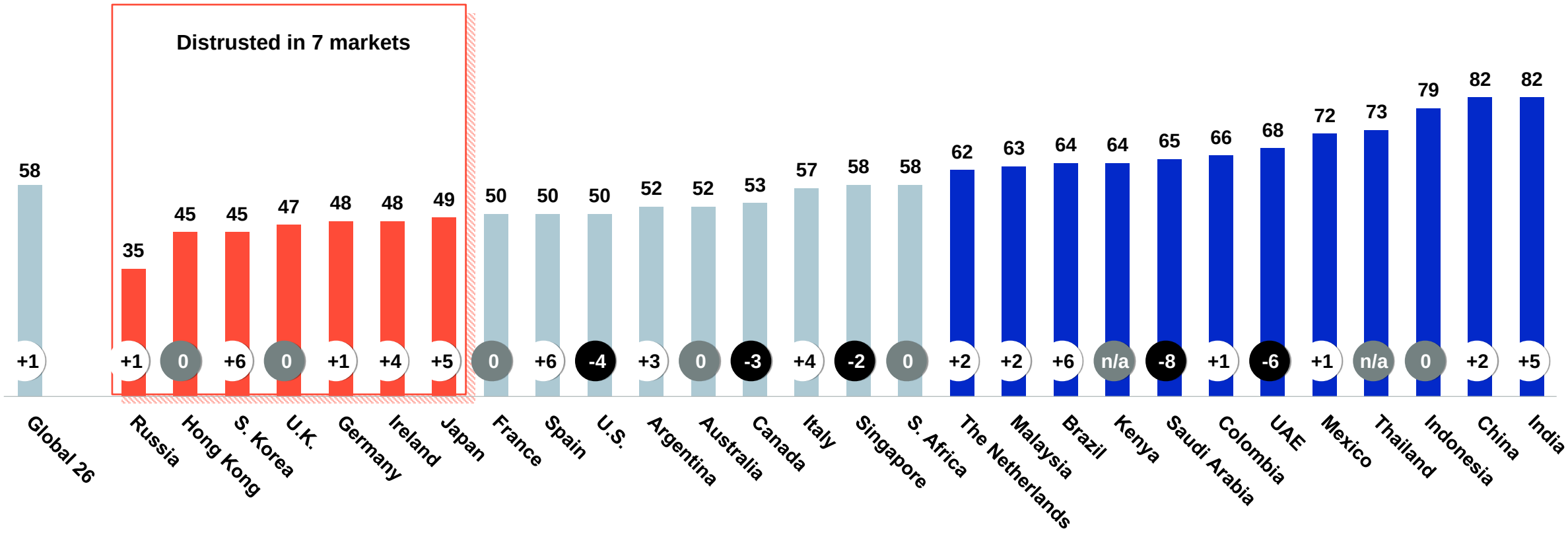
Percent trust in NGOs



2020 Edelman Trust Barometer. TRU_INS. [NGOs in general] 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.

TRUST IN BUSINESS INCREASES IN 15 OF 26 MARKETS

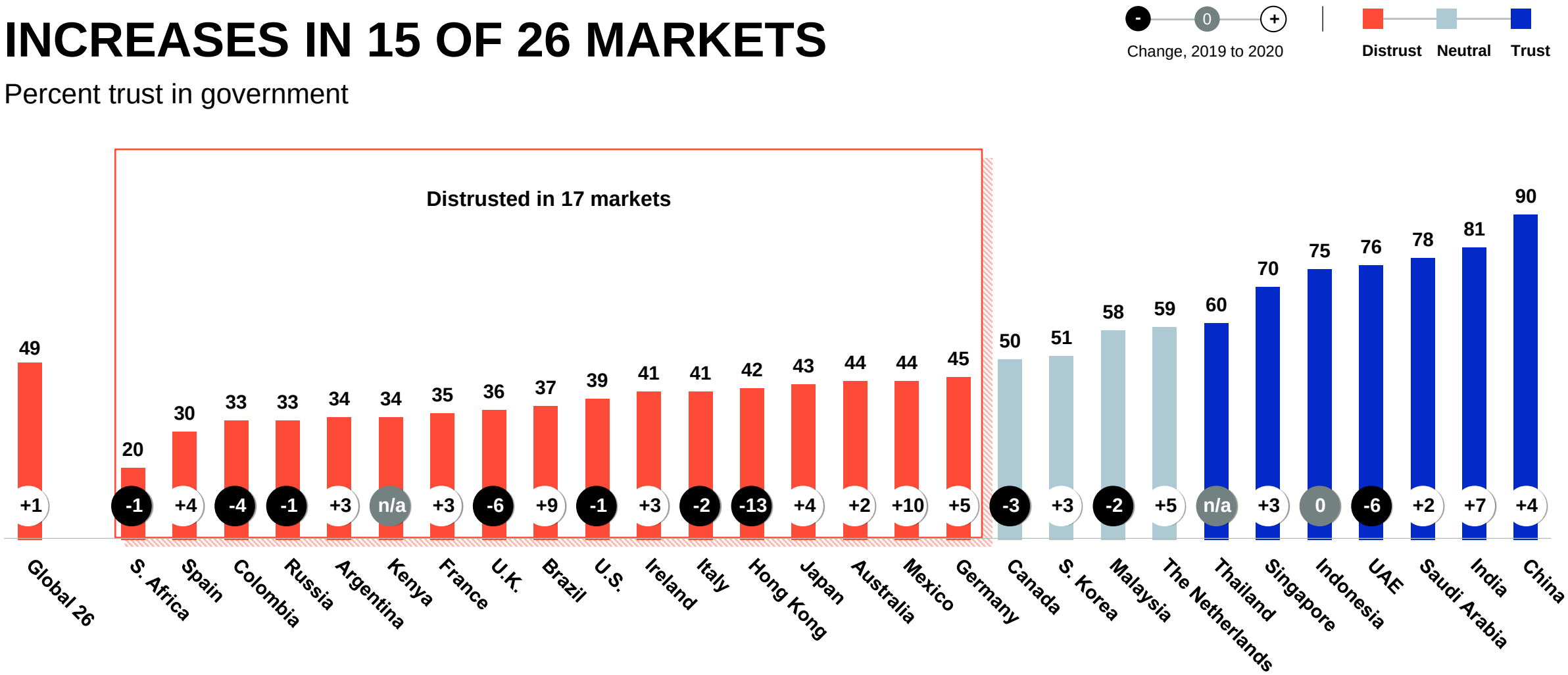
Percent trust in business



2020 Edelman Trust Barometer. TRU_INS. [Business in general] 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.

TRUST IN GOVERNMENT INCREASES IN 15 OF 26 MARKETS

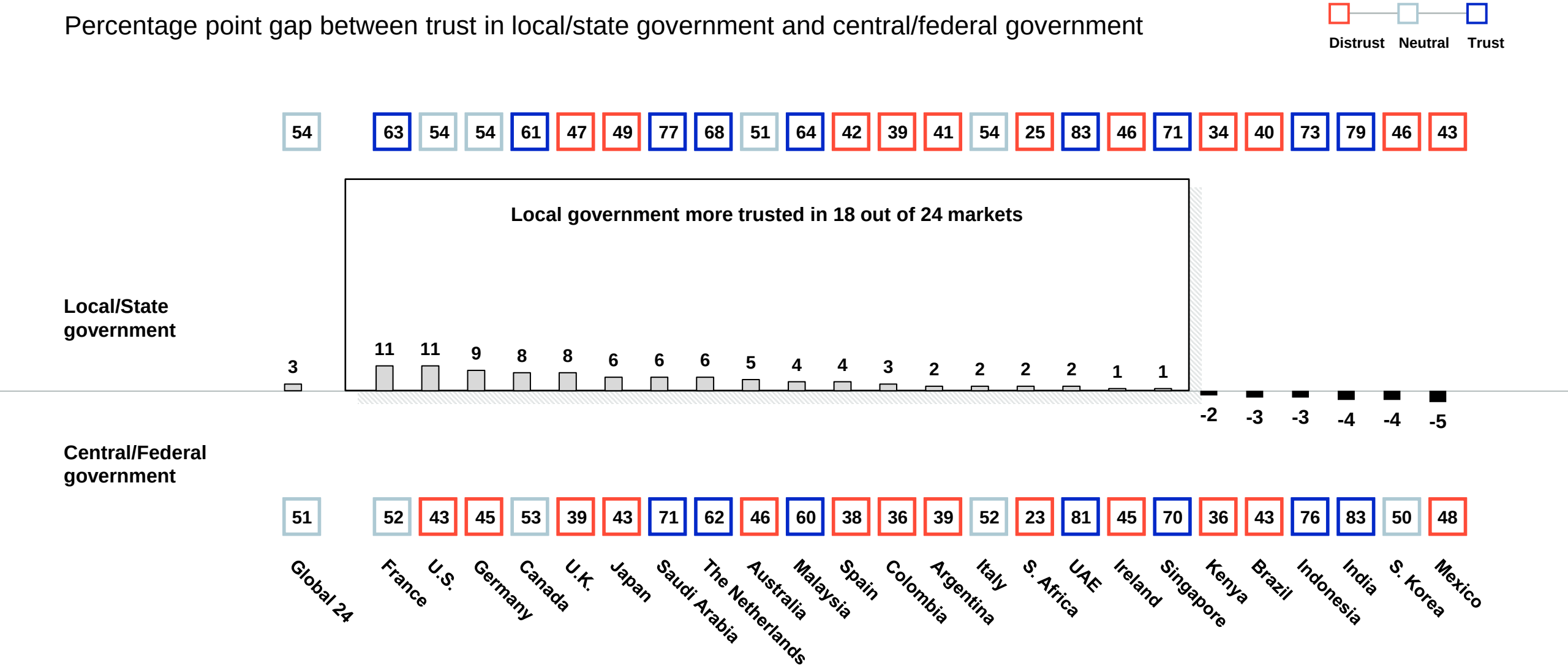
Percent trust in government



2020 Edelman Trust Barometer. TRU_INS. [Government in general] 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.

MORE TRUST IN LOCAL GOVERNMENT

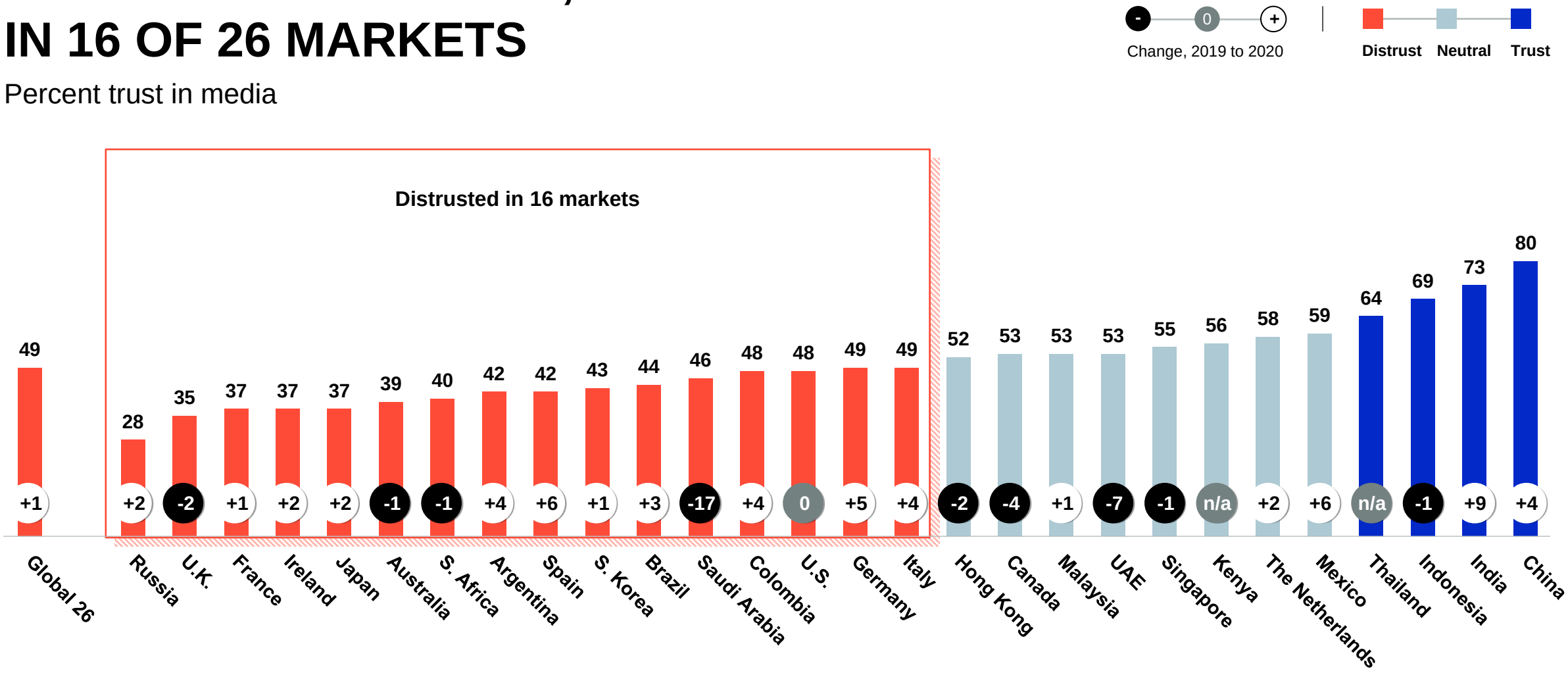
Percentage point gap between trust in local/state government and central/federal government



2020 Edelman Trust Barometer. TRU_INS. [Central/federal government and your local/state government] 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, 24-mkt avg. Data not collected in China, Hong Kong, Russia and Thailand.

TRUST IN MEDIA RISES, IN 16 OF 26 MARKETS

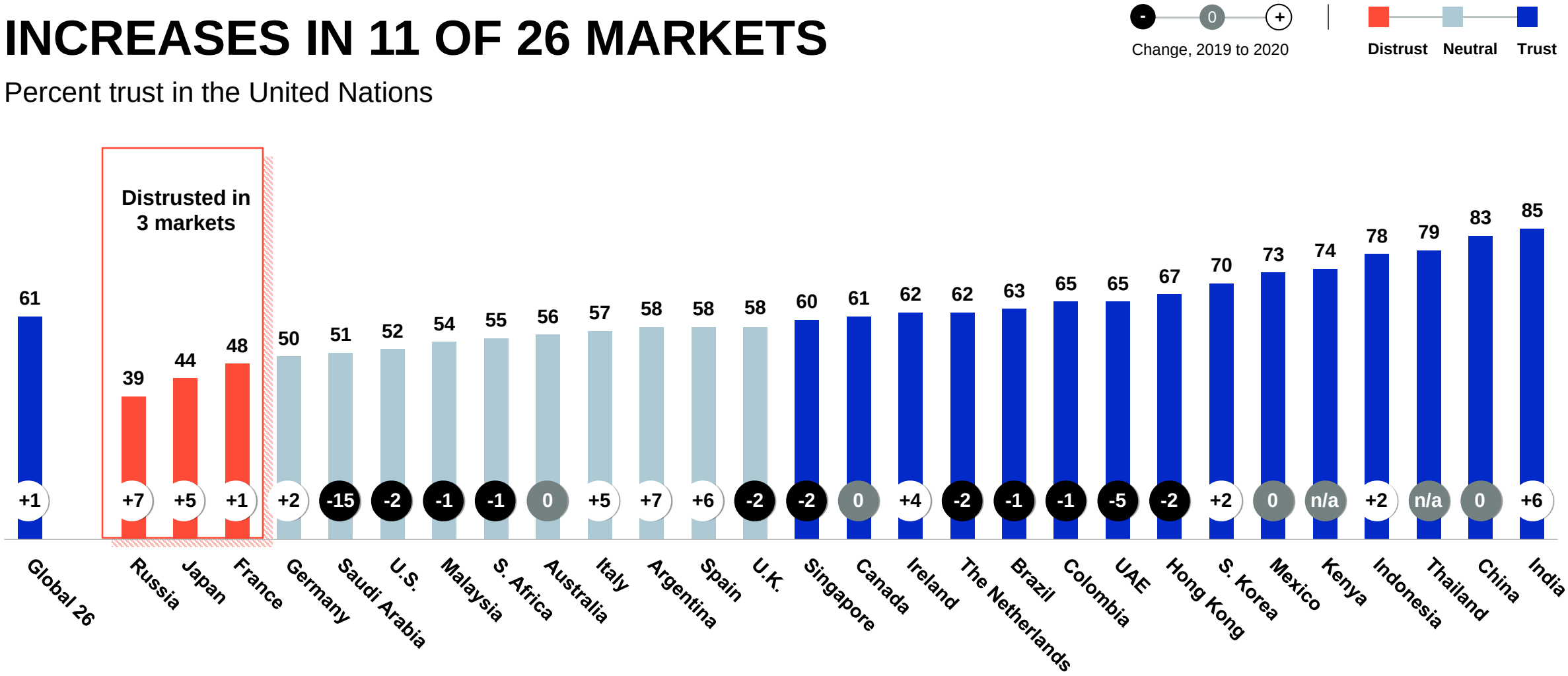
Percent trust in media



2020 Edelman Trust Barometer. TRU_INS. [Media in general] 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.

TRUST IN THE UNITED NATIONS INCREASES IN 11 OF 26 MARKETS

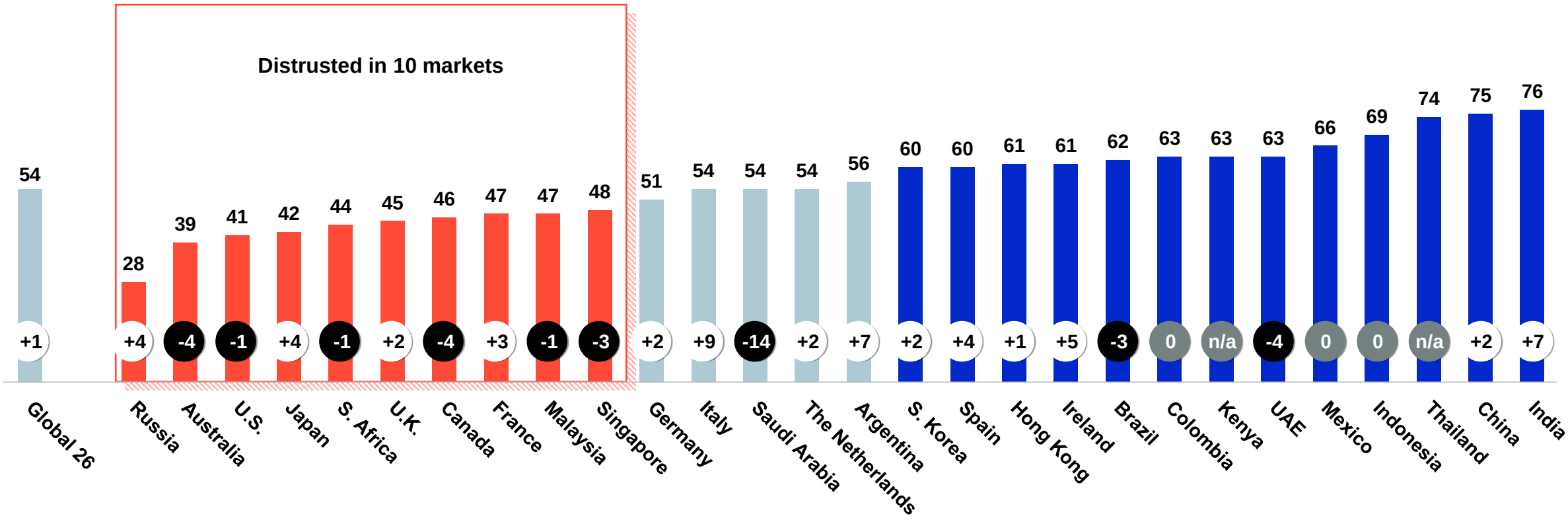
Percent trust in the United Nations



2020 Edelman Trust Barometer. TRU_INS. [United Nations] 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.

TRUST IN THE EUROPEAN UNION INCREASES IN 14 OF 26 MARKETS

Percent trust in the European Union



2020 Edelman Trust Barometer. TRU_INS. [The European Union] 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.

INSTITUTIONAL PERFORMANCE

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

Strength **> 50%**

Weakness < 50%

NGOs	
Protect civil and human rights	**58**
Protect the environment	**58**
Global-level problems	**56**
Set goals with regular public updates	**54**
Community-level problems	**53**
Educate people for good decisions	**53**
Partner with business	49
Poverty, illiteracy, disease	48
Transparency about funding	47
Partner with government	47
Expose corruption	46
Avoid becoming politicized	46

Business	
Meet customer expectations	**66**
Generate value for owners	**66**
Engine of innovation	**57**
Diversity in the workplace	**57**
Sustainable business practices	**56**
Drive economic prosperity	**55**
Deal fairly with suppliers	**54**
Contribute to communities	48
Invest in employee training	48
Partner with government	42
Partner with NGOs	42
Jobs that pay a decent wage	40

Government	
Social services for the poor	37
Balance national interests and international engagement	36
International alliances, defense	35
Safe and modern infrastructure	32
Partner with business	31
Community-level problems	31
Regulate emerging tech	31
Partner with NGOs	30
Protect civil and human rights	29
Education	28
Reduce partisanship	26
Maintain law and order	24

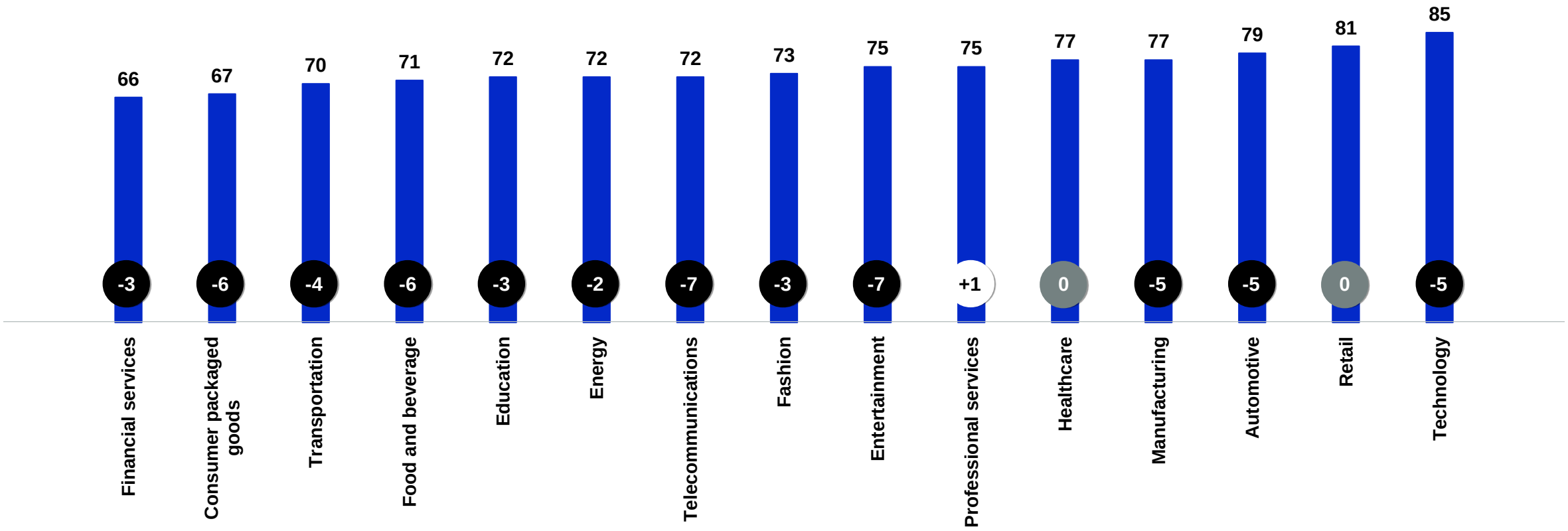
Media	
Covering national news	**61**
Covering international news	**59**
Covering local news	**57**
Enough journalists	**51**
Information for good decisions	42
Let people be heard	41
Differentiate opinion and fact	39
Exposing corruption	38
Important vs sensationalized	37
Information quality	36
Keep social media clean	35
Being objective	35

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, Mexico.

Trust in Business in Detail

TRUST IN INDUSTRY SECTORS

Percent trust in each sector in Mexico



2020 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, Mexico.

INDUSTRY SECTORS OVER TIME

Percent trust in each sector in Mexico

Change, 2012 to 2020

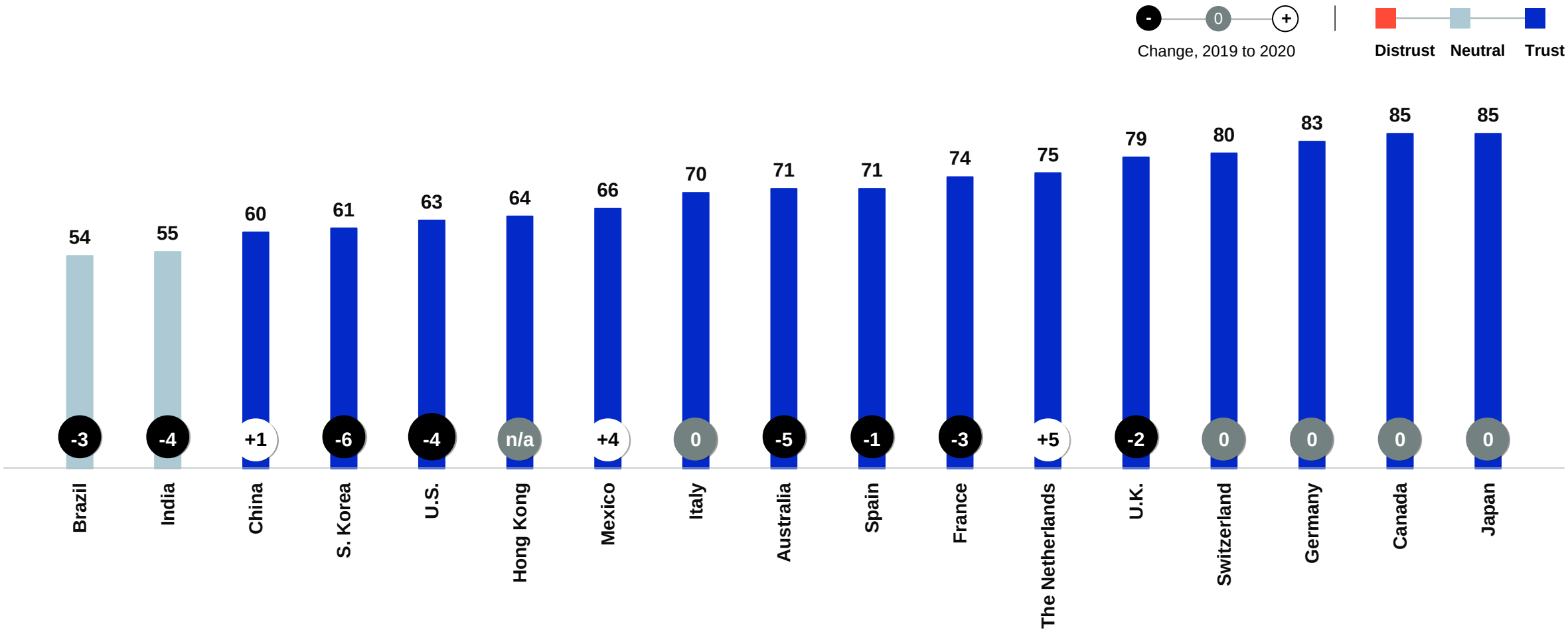
Distrust Neutral Trust

Industry	2012	2013	2014	2015	2016	2017	2018	2019	2020	8yr. Trend
Technology	87	87	86	84	90	87	89	90	85	-2
Automotive	82	85	83	83	84	82	81	84	79	-3
Healthcare	-	-	-	-	75	78	69	77	77	n/a
Entertainment	-	78	76	75	80	78	75	82	75	n/a
Energy	66	76	69	64	70	72	79	74	72	+6
Telecommunications	70	76	73	68	75	74	73	79	72	+2
Food and beverage	80	81	76	73	79	81	71	77	71	-9
Consumer packaged goods	73	78	72	68	73	74	68	73	67	-6
Financial services	61	66	63	57	67	68	66	69	66	+5

2020 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, Mexico.

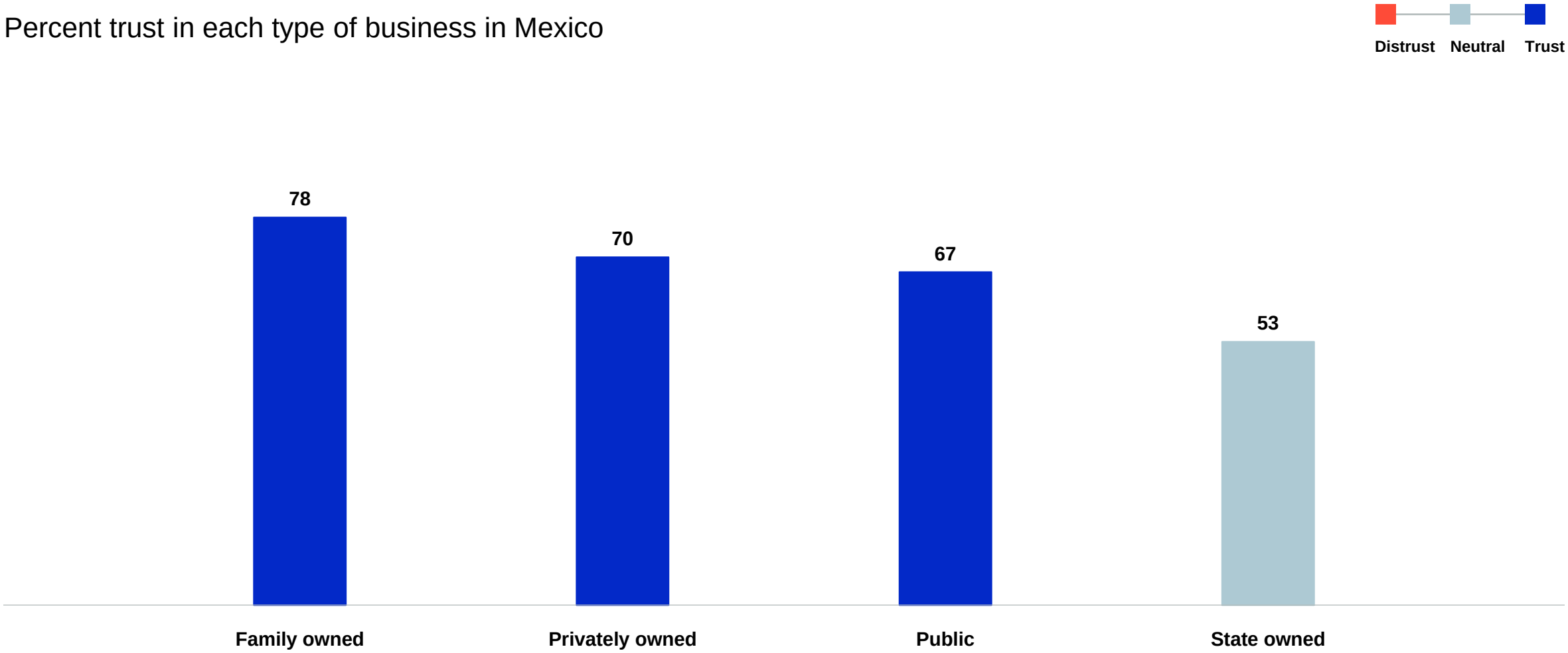
TRUST IN COMPANIES FROM DIFFERENT MARKETS

Trust in companies headquartered in each market in Mexico



FAMILY-OWNED BUSINESSES MOST TRUSTED

Percent trust in each type of business in Mexico



2020 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 of the sample. General population, Mexico.

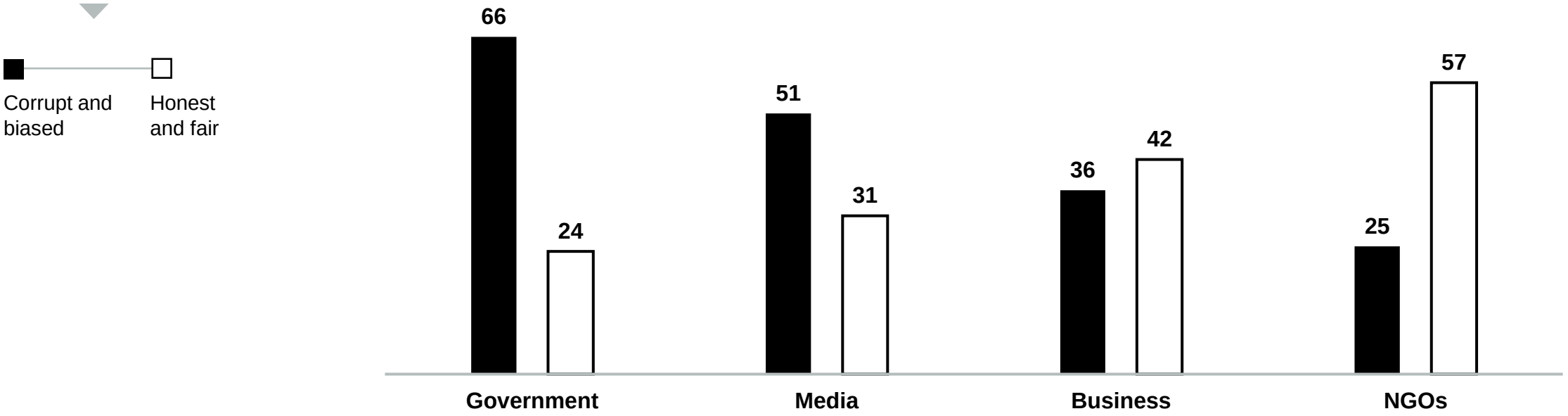
Modeling Trust

GOVERNMENT AND MEDIA SEEN AS LACKING HONESTY

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

This institution…

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

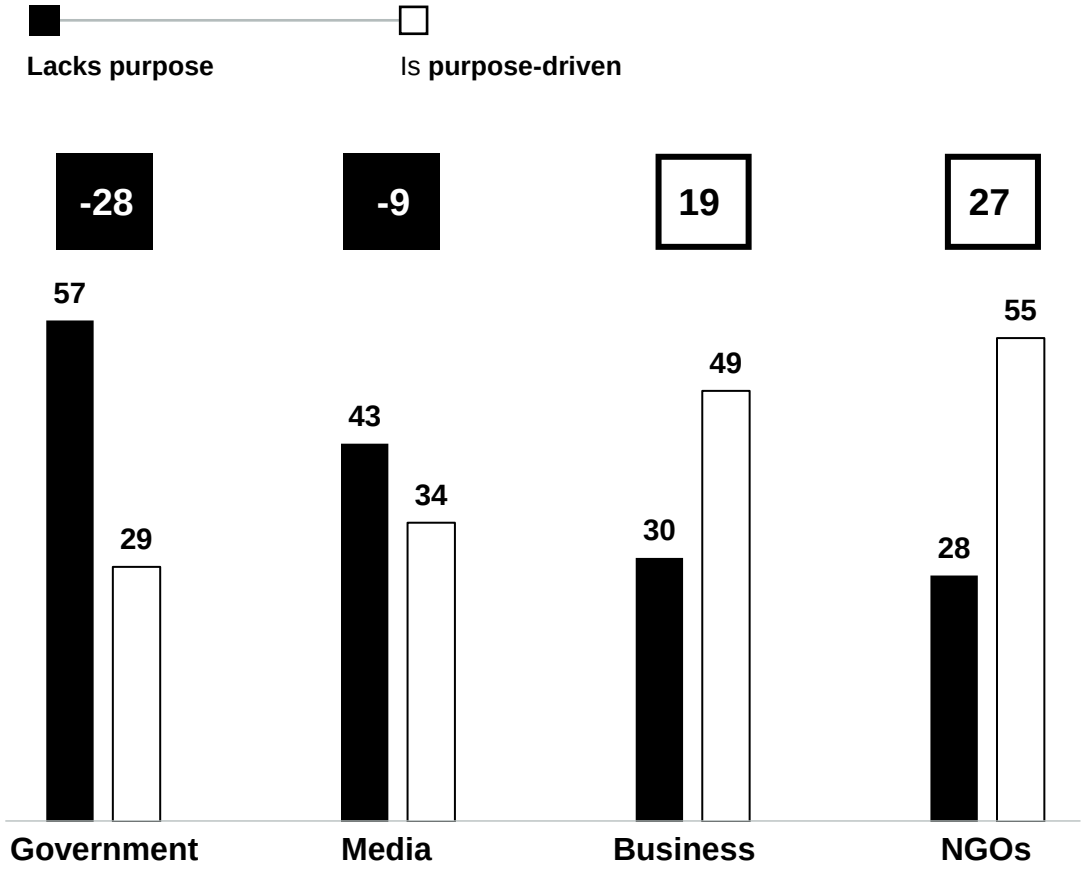


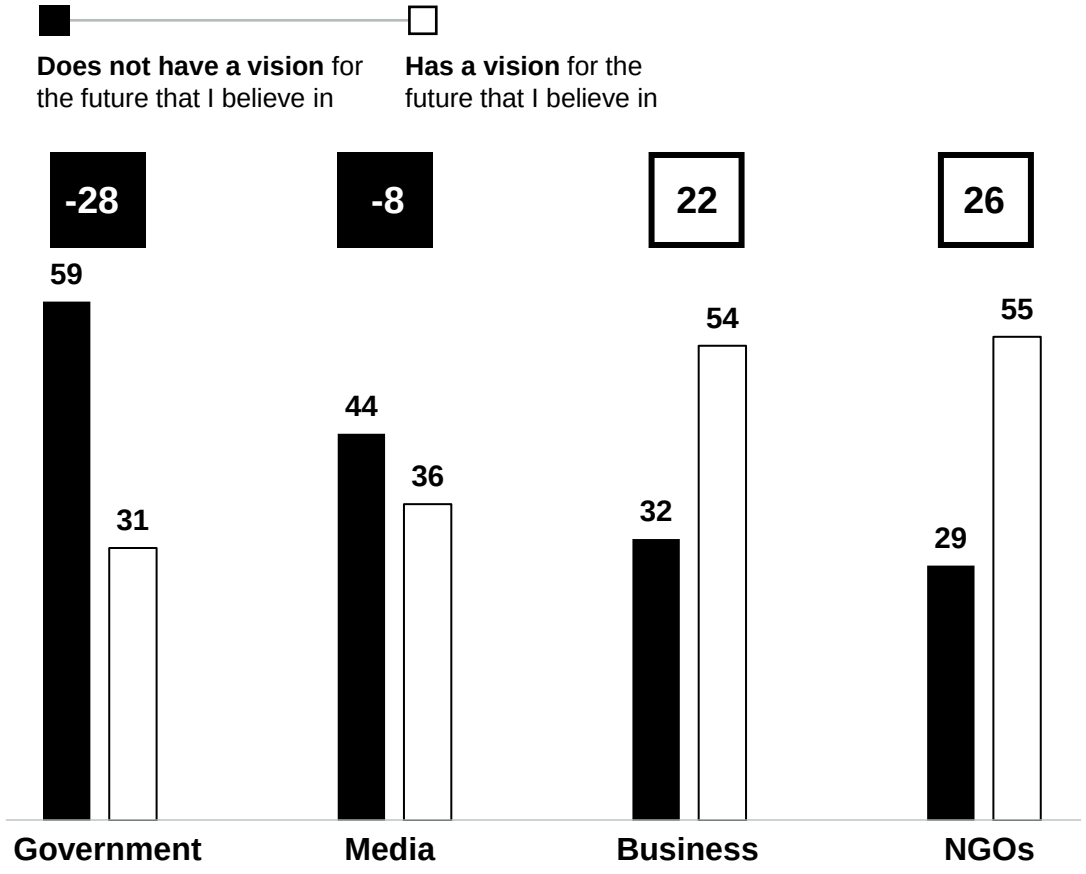
2020 Edelman Trust Barometer. Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point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

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

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

This institution…
- **Is purpose-driven**
- Is honest
- **Has vision**
- Is fair

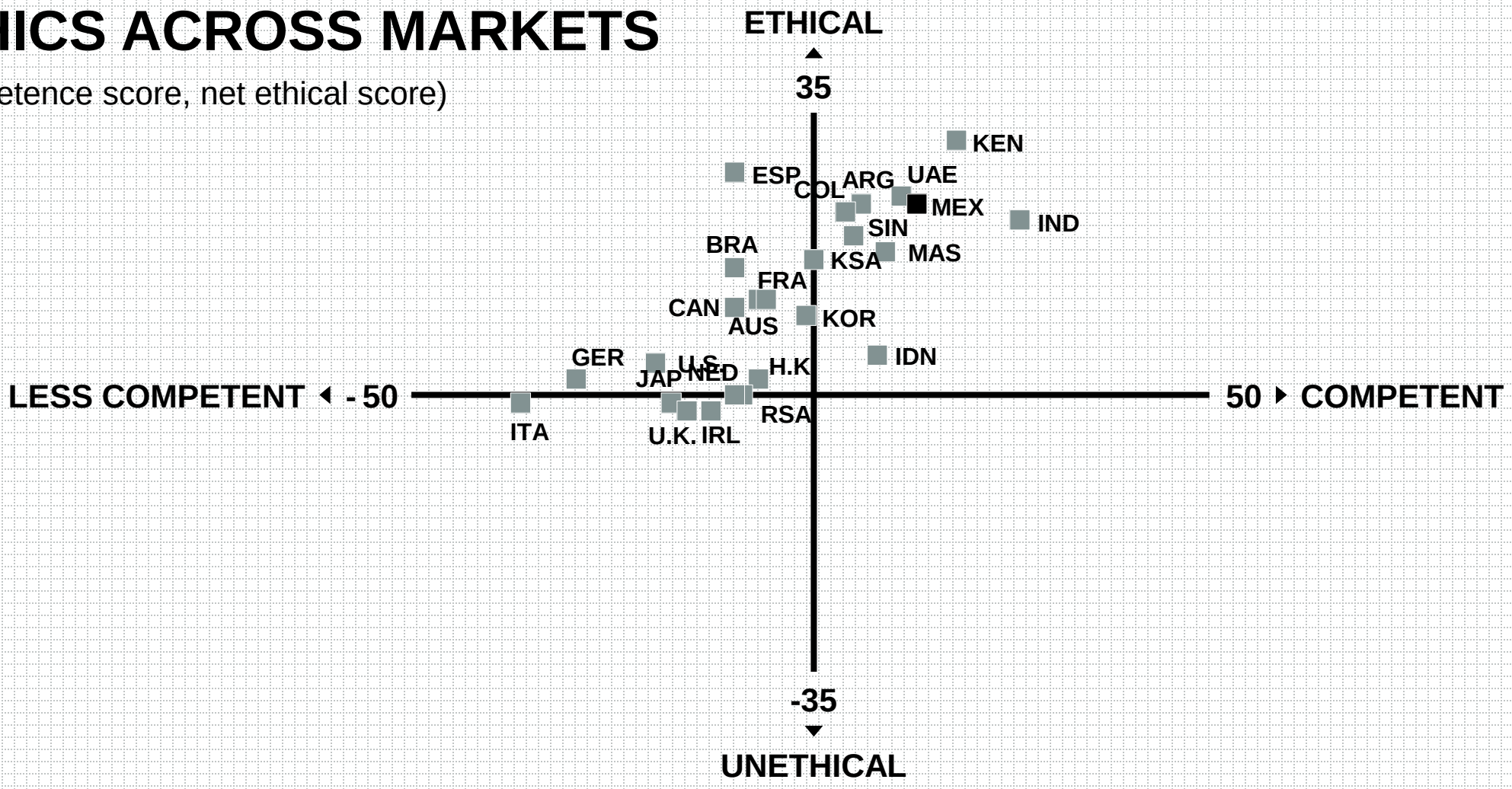




2020 Edelman Trust Barometer. Net scores represent positive responses minus negative responses to the following questions: [INSTITUTION]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point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

NGOS: COMPETENCE AND ETHICS ACROSS MARKETS

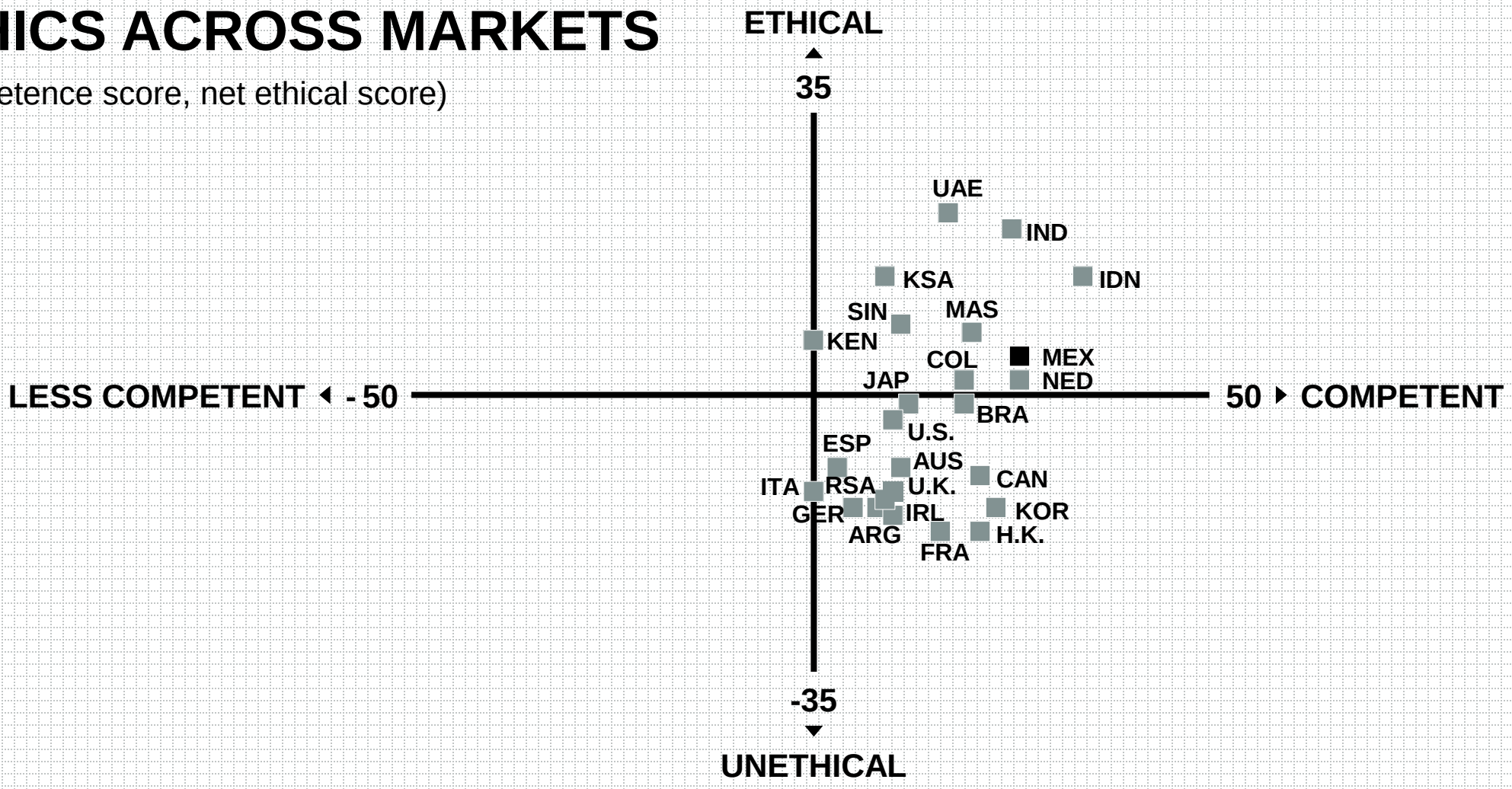
(Competence score, net ethical score)



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

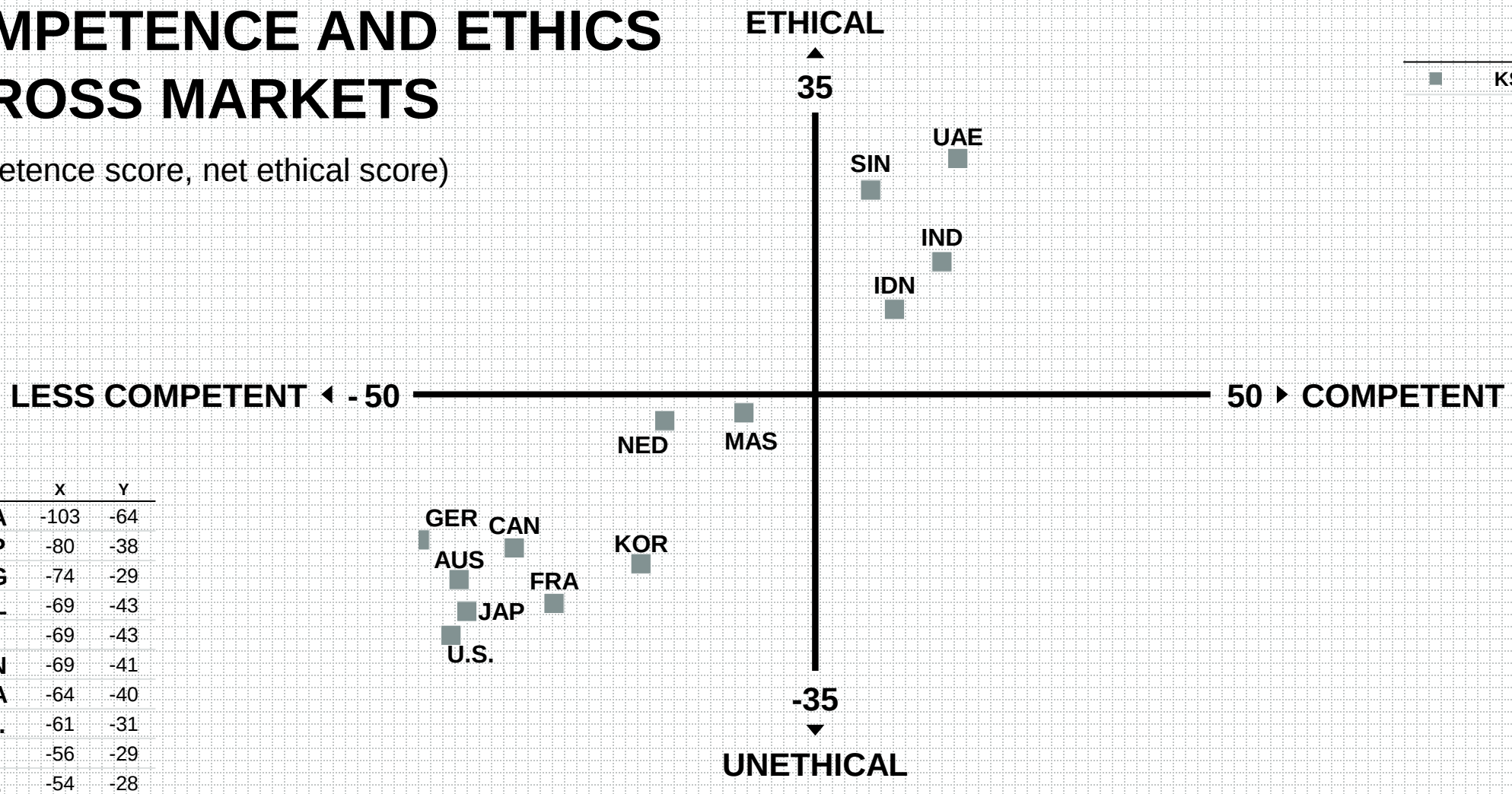
(Competence score, net ethical score)



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)



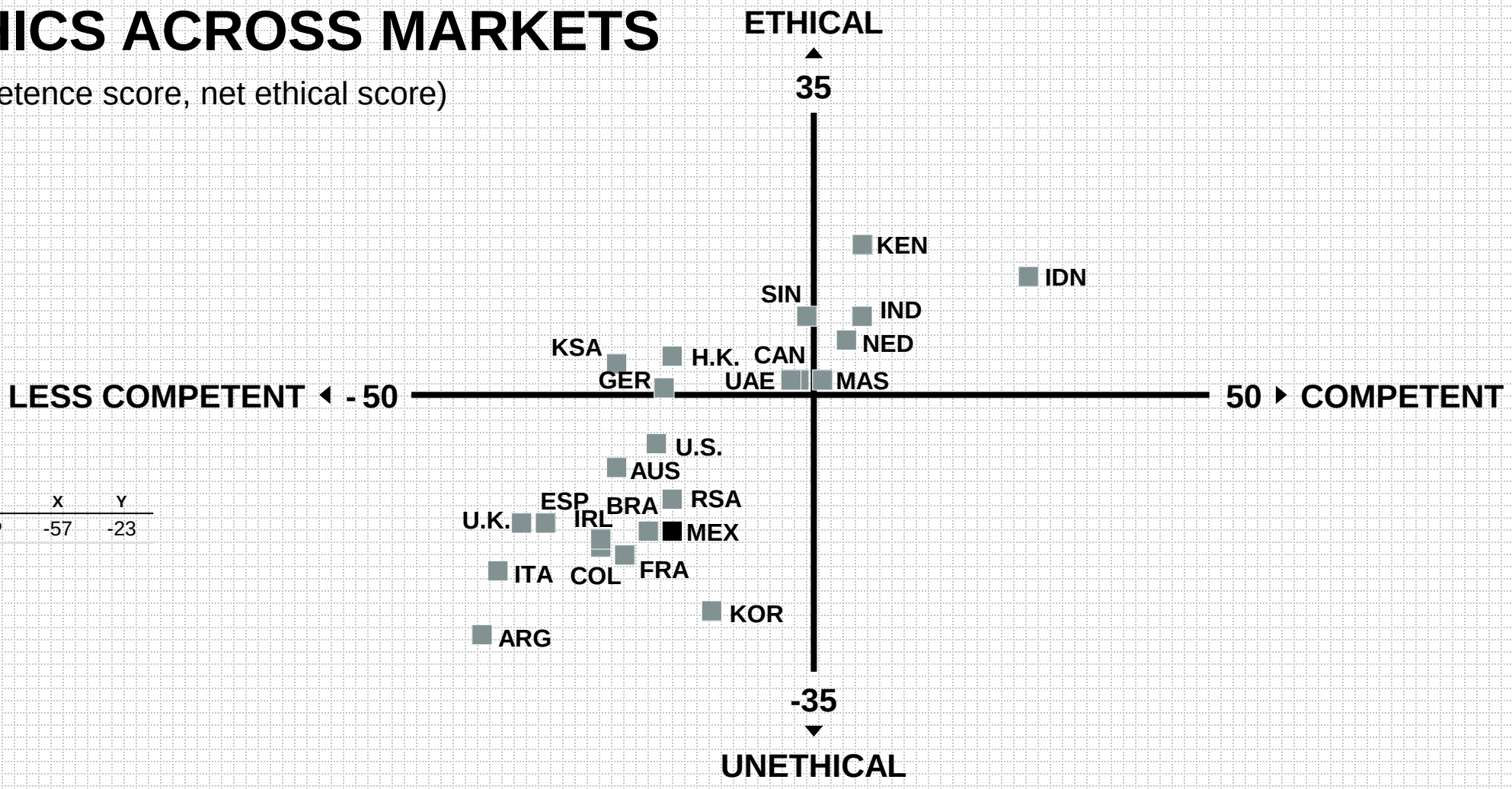
	X	Y
KSA	17	38

	X	Y
RSA	-103	-64
ESP	-80	-38
ARG	-74	-29
COL	-69	-43
ITA	-69	-43
KEN	-69	-41
BRA	-64	-40
U.K.	-61	-31
HK	-56	-29
IRL	-54	-28
MEX	-52	-36

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)



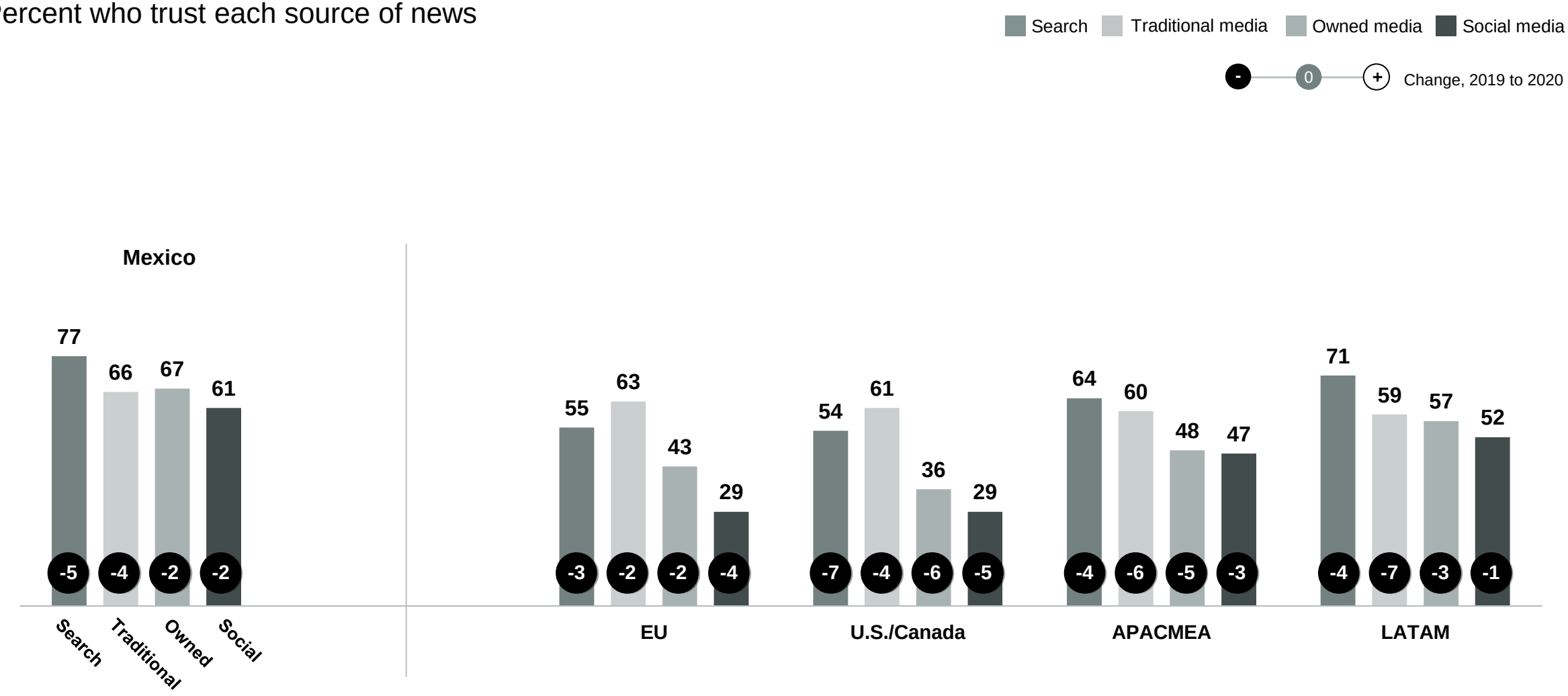
	X	Y
JAP	-57	-23

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

CHAMPION RELIABLE SOURCES

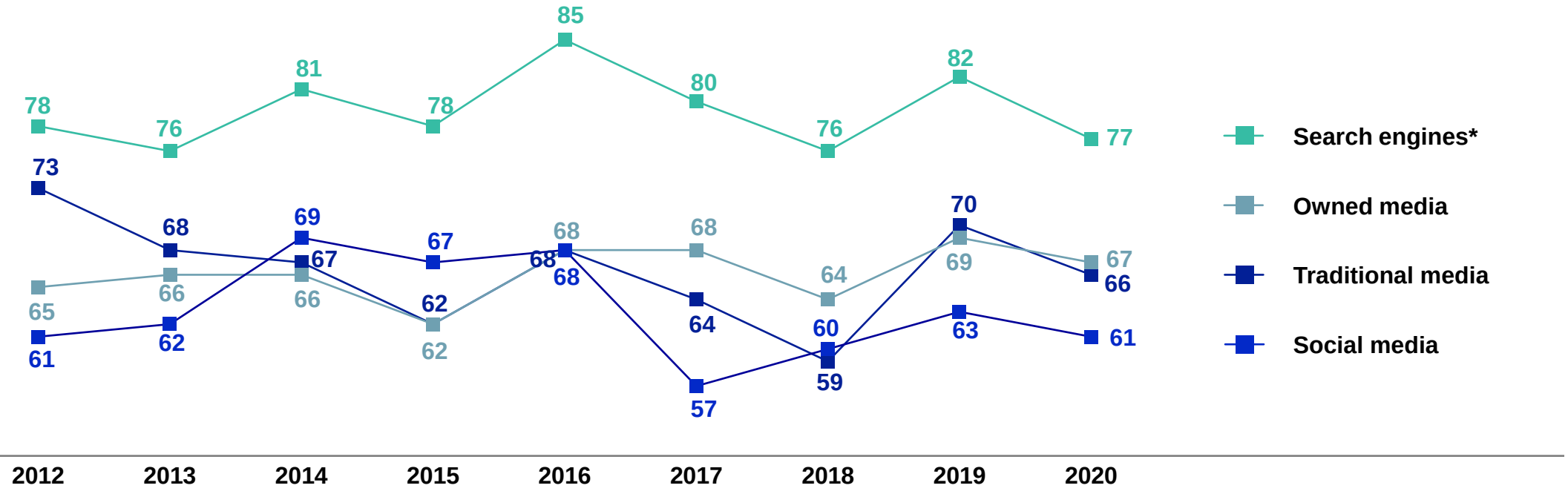
Percent who trust each source of news



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, Mexico and by region.

SEARCH ENGINES AND OWNED MEDIA MOST TRUSTED MEDIA SOURCES

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



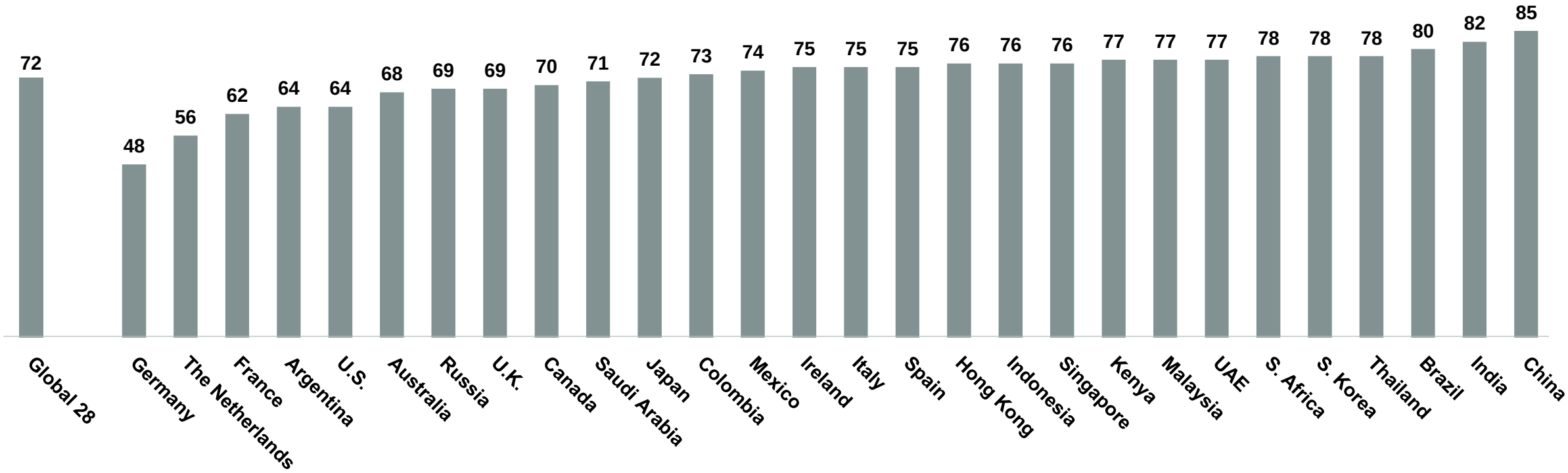
2020 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Mexico.

*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

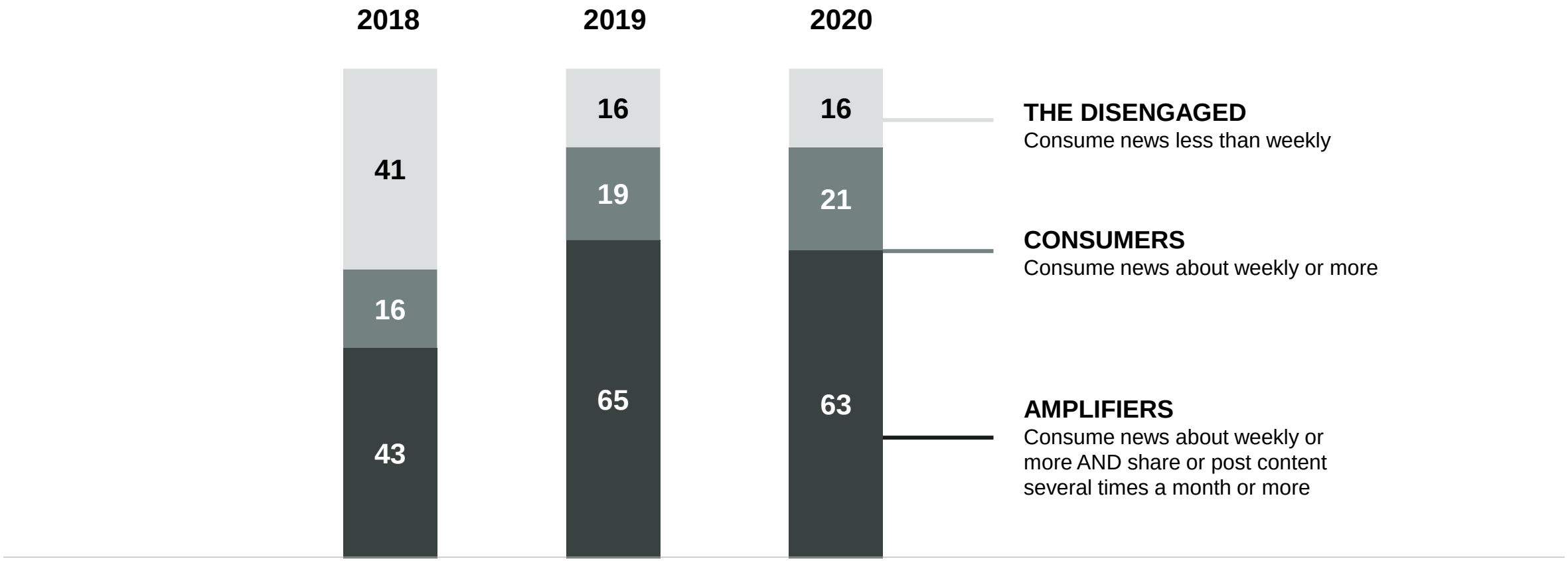
Companies **should stop advertising with any media platform** that fails to prevent the spread of fake news and false information



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 MEXICO

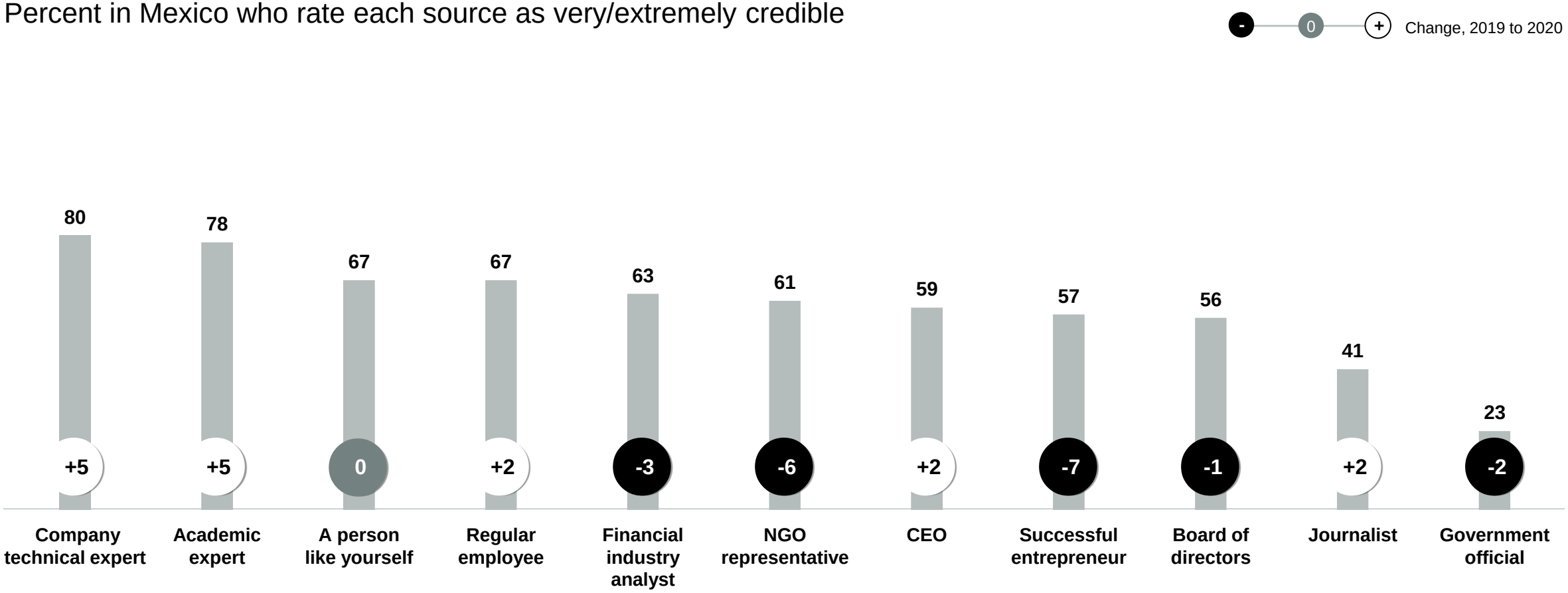
How often do you engage in the following activities related to news and information?



2020 Edelman Trust Barometer. News Engagement Scale, built from 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. General population, Mexico. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

EXPERTS AND PEERS MOST CREDIBLE

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



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, Mexico.

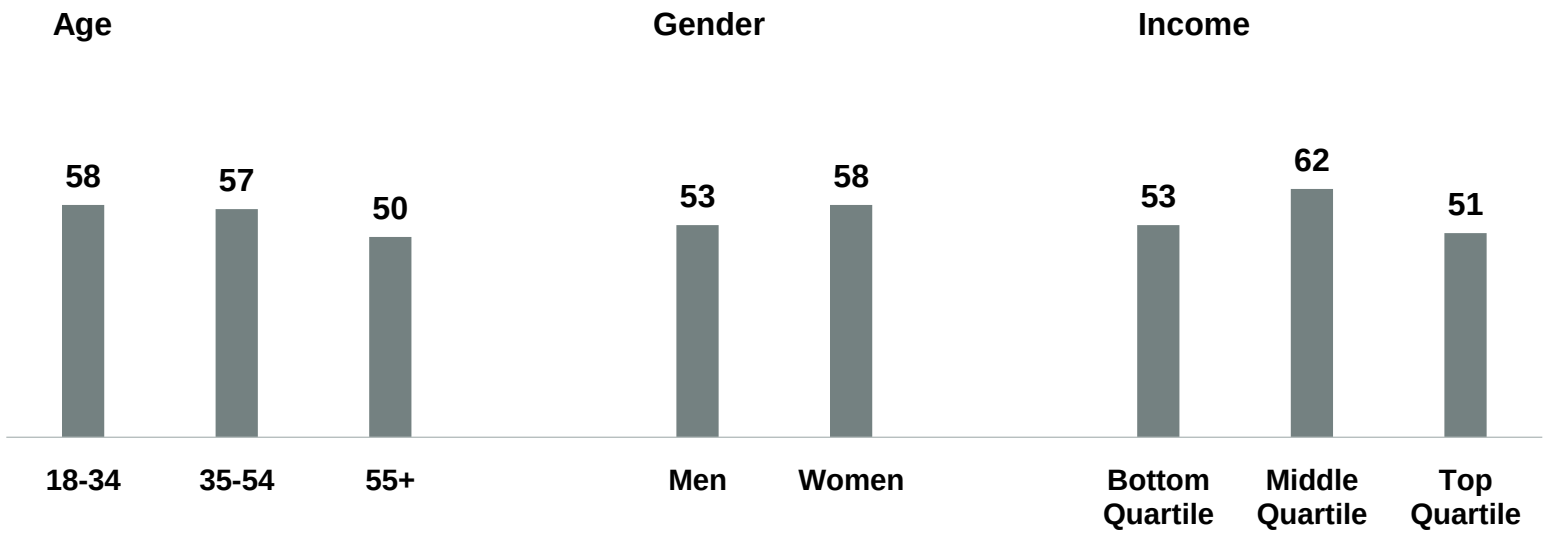
Societal Issues

CAPITALISM IN QUESTION ACROSS GENERATIONS, GENDERS AND INCOME GROUPS

Percent in Mexico who agree

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

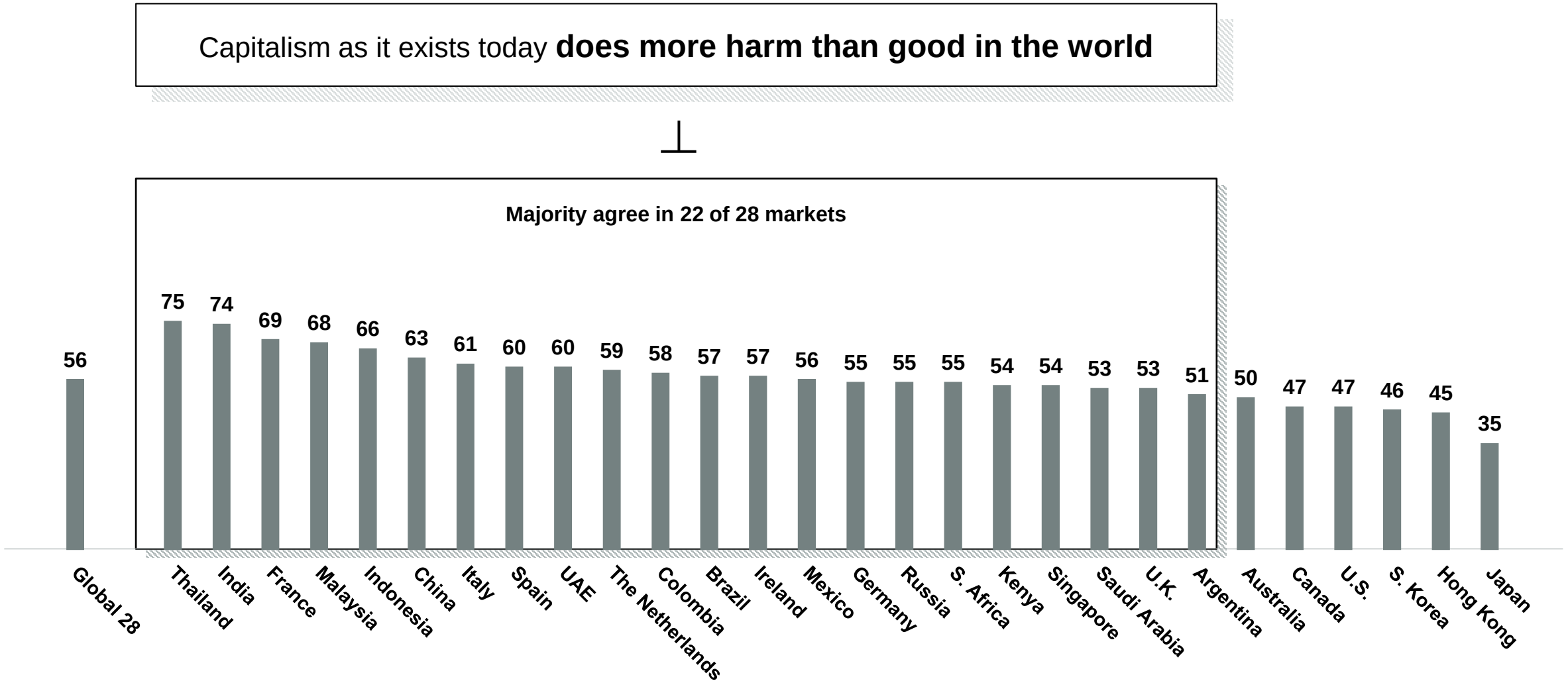
56%



2020 Edelman Trust Barometer. 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, Mexico, by age, gender and income.

CAPITALISM IN QUESTION AROUND THE WORLD

Percent who agree



2020 Edelman Trust Barometer. 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, 28-mkt avg.

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).

TECHNICAL APPENDIX

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Edelman Trust Barometer 2020

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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).

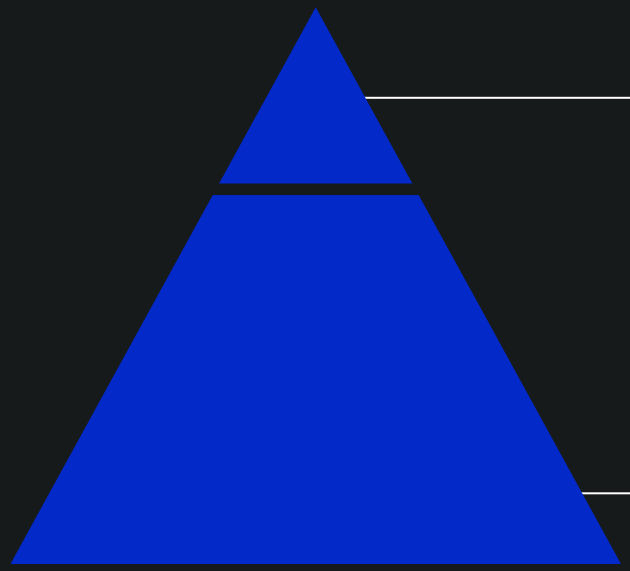
Gen Z MOE: 28-market = +/- 1.5% (N=4,310)
Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

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.internet worldstats.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 bring 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

Edelman Intellectual Property

Executive Director	**Tonia E. Ries** tonia.ries@edelman.com
Executive Advisors	**Richard Edelman** **Stephen Kehoe** **Ed Williams**
Executive Editor	**Joseph Tropiano**
VP of Operations	**Sarah Adkins**
Sr. Project Manager	**Esther Choi**
Project Manager	**Alina Krikunova**
Executive Creative Producer	**David Isaacs**

Edelman Intelligence

Head of Thought Leadership Research	**David M. Bersoff, Ph.D.** david.bersoff@edelmanintelligence.com
Sr. Research Manager	**Cody Armstrong**
Statistician	**Joshua Wu**
Research Coordinators	**Nick Maxwell** **Giuseppe Bovenzi**
Assoc. Research Coordinator	**Abbey Fox**
Assoc. Data Processor	**John Zamites**