

HEALTHCARE
SECTOR: GLOBAL



21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 countries*

33,000+ respondents

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

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

27-market global data margin of error: General population +/- 0.6% (N=31,050); informed public +/- 1.3% (N=6,000); mass population +/- 0.6% (N=25,050+); half-sample global general online population +/- 0.8% (N=15,525).

Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).

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

General Online Population

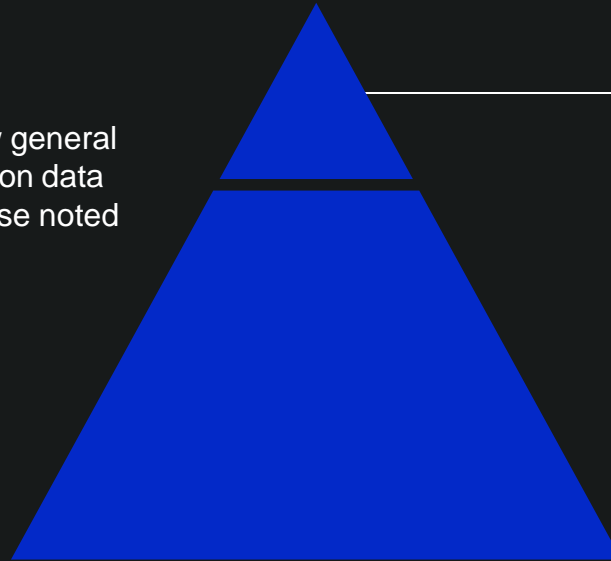
1,150

respondents per country

Ages

18+

All slides show general
online population data
unless otherwise noted



Informed Public

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

Represents **17%** of total global population

Must meet 4 criteria:

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

Mass Population

All population not including
informed public

Represents **83%** of total global
population



U.S. Post-Election Supplement

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

21 YEARS OF TRUST

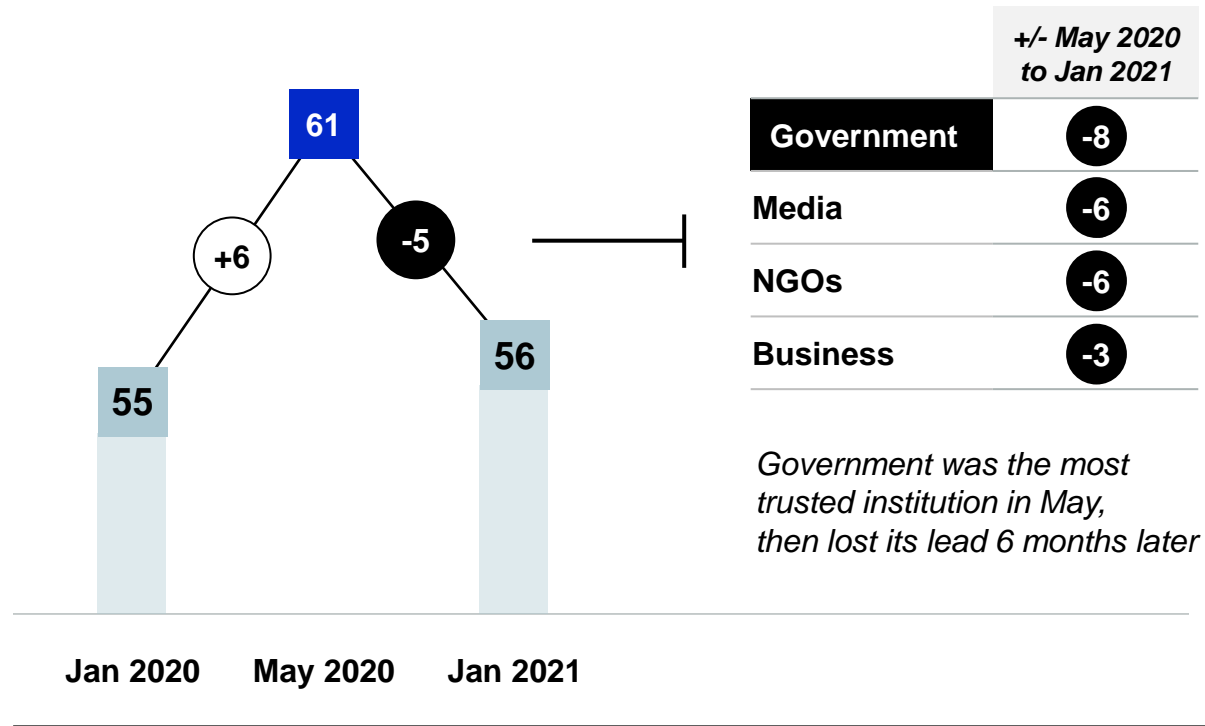
2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummet	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	
Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	The Battle for Truth	Trust at Work	Trust: Competence and Ethics	Declaring Information Bankruptcy	

SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

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



Global 11

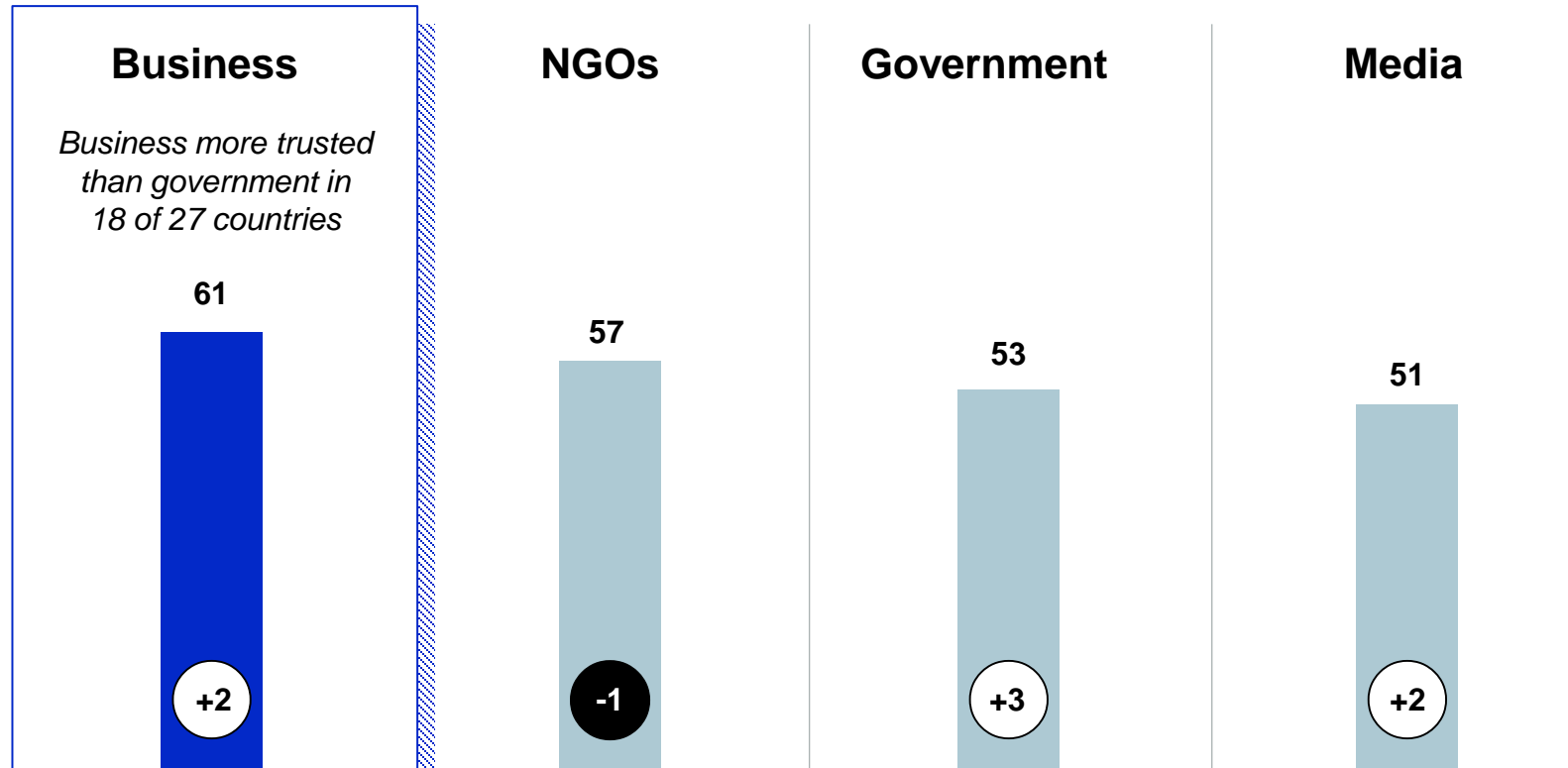
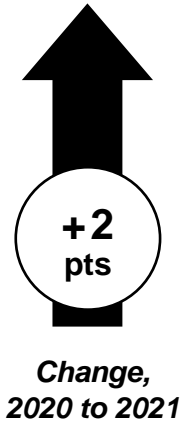


Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

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

BUSINESS BECOMES ONLY TRUSTED INSTITUTION

Percent trust



TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

Percent trust in my employer

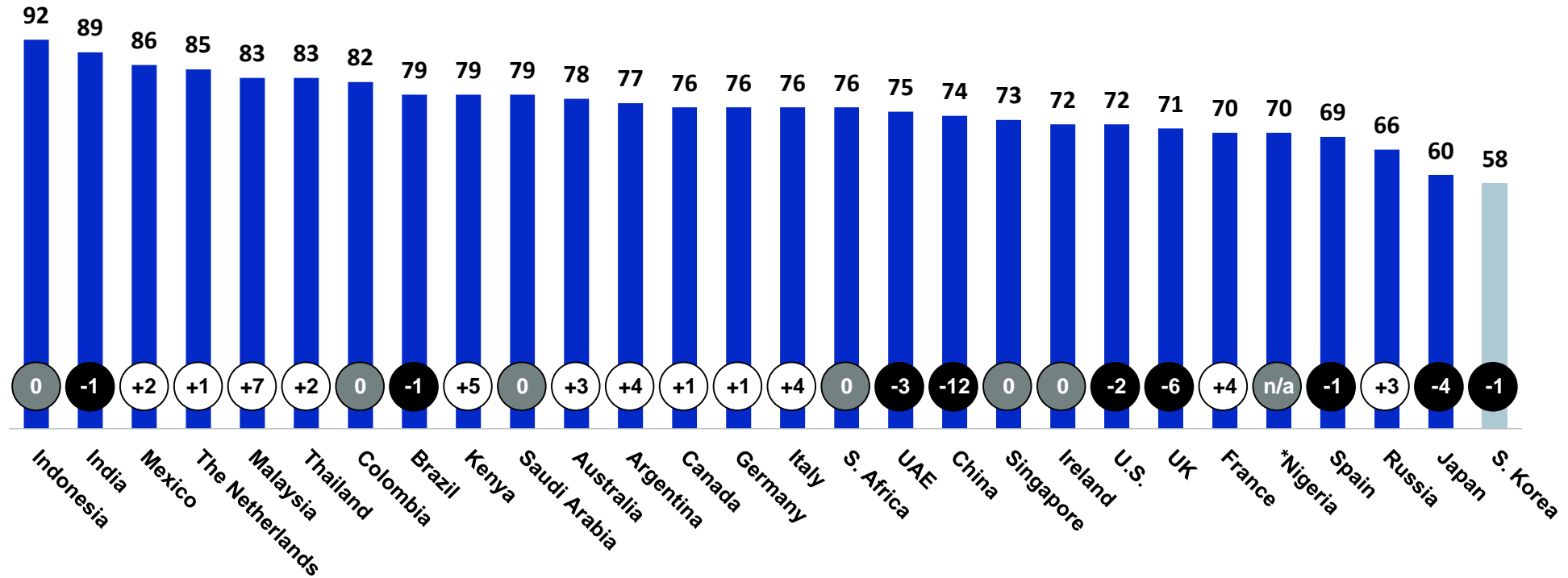


Global 27



Business	61
NGOs	57
Government	53
Media	51

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

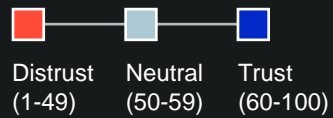


2021 Edelman Trust Barometer. TRU_INS. [Your employer] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. Question asked among those who are employed (Q43/1).

*Nigeria not included in the global average

TRUST INEQUALITY SPREADS FURTHER

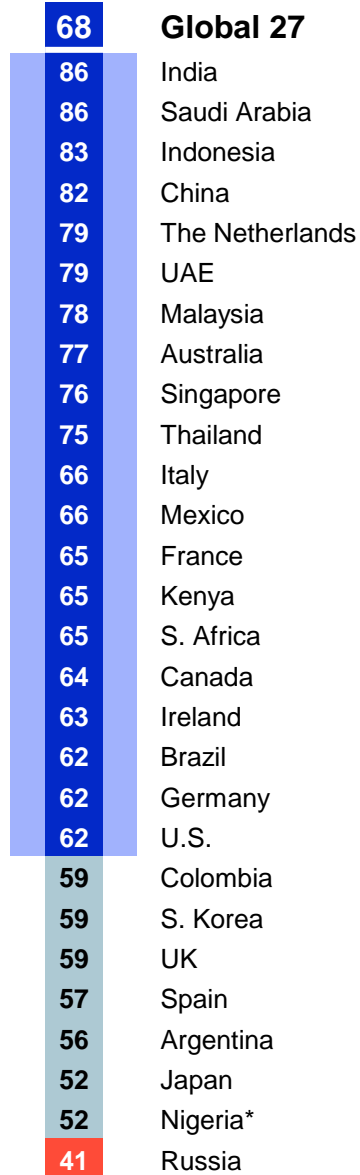
Trust Index



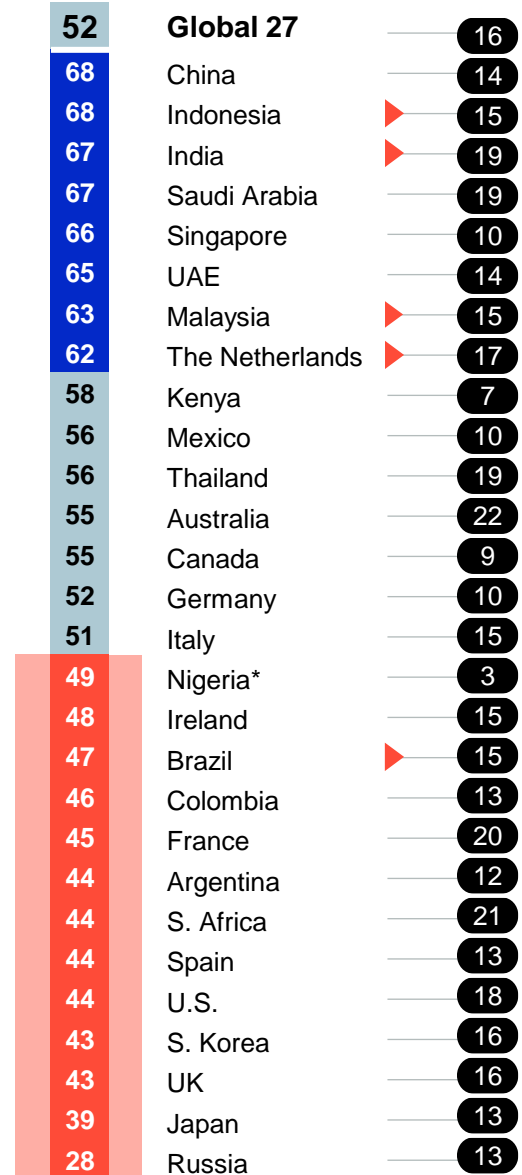
Mass population 16 points less trusting

2021 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, 27-mkt avg. *Nigeria not included in the global average

2021 Informed public



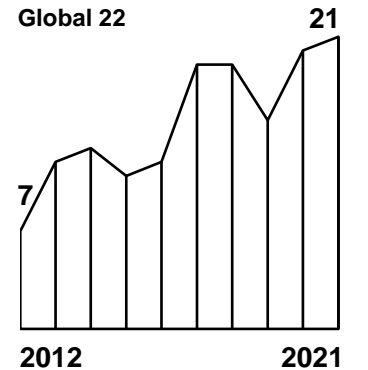
2021 Mass population | Trust gap



Record trust inequality

DOUBLE-DIGIT TRUST INEQUALITY IN RECORD NUMBER OF COUNTRIES

Nr. of countries with double-digit trust inequality



⊥

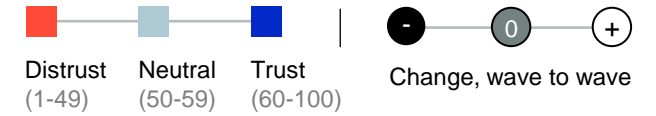
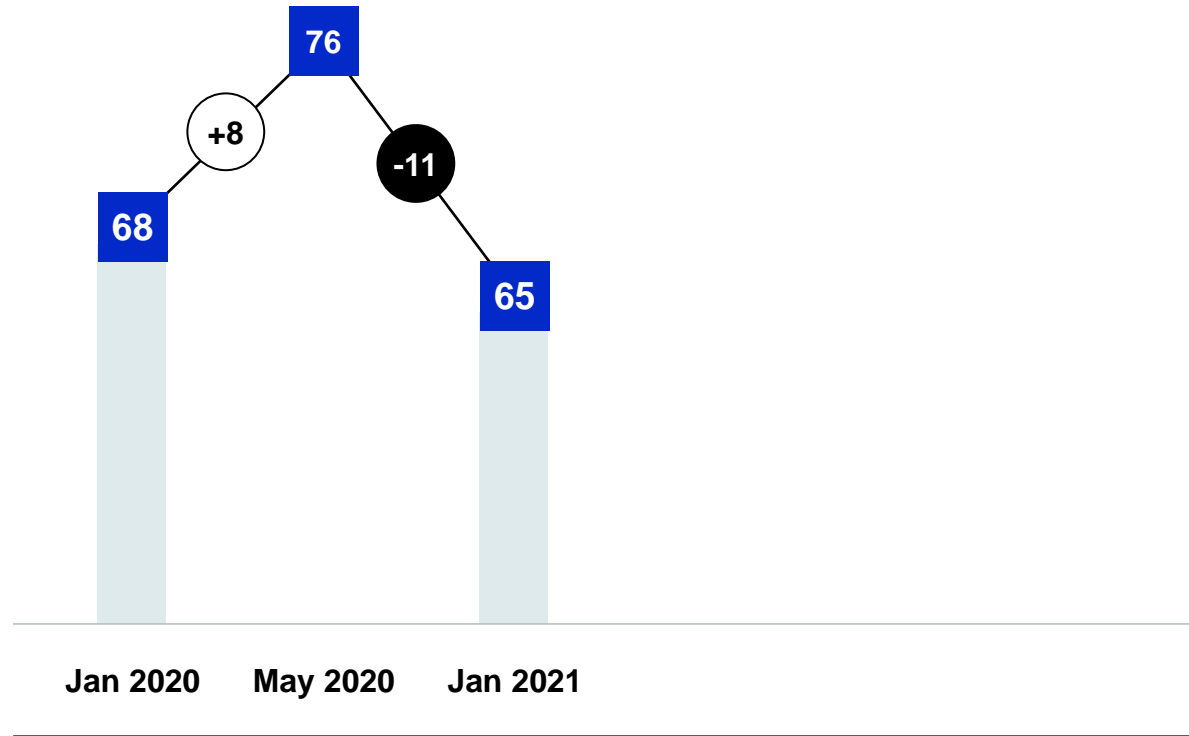
TRUST IN HEALTHCARE UNDER STRESS

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SPRING TRUST BUBBLE BURSTS FOR HEALTHCARE SECTOR

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

Global 11, trust in healthcare



Countries	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
Mexico	+6	-20
China	+8	-17
Canada	+14	-15
S. Korea	+2	-11
UK	+9	-10
U.S.	+18	-10
Japan	-5	-9
Germany	+14	-8
Saudi Arabia	+9	-6
France	+6	-5
India	+5	-4

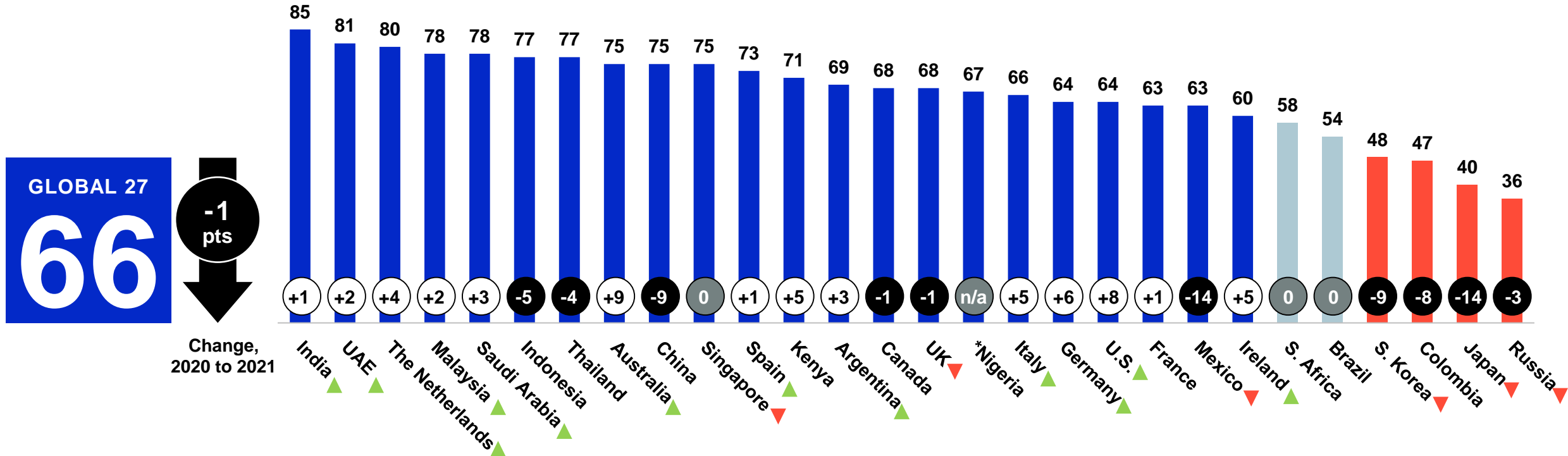
VOLATILE YEAR CREATES RECORD HIGHS AND RECORD LOWS FOR TRUST IN HEALTHCARE

Percent trust in healthcare sector



▼ All-time low in 6 countries

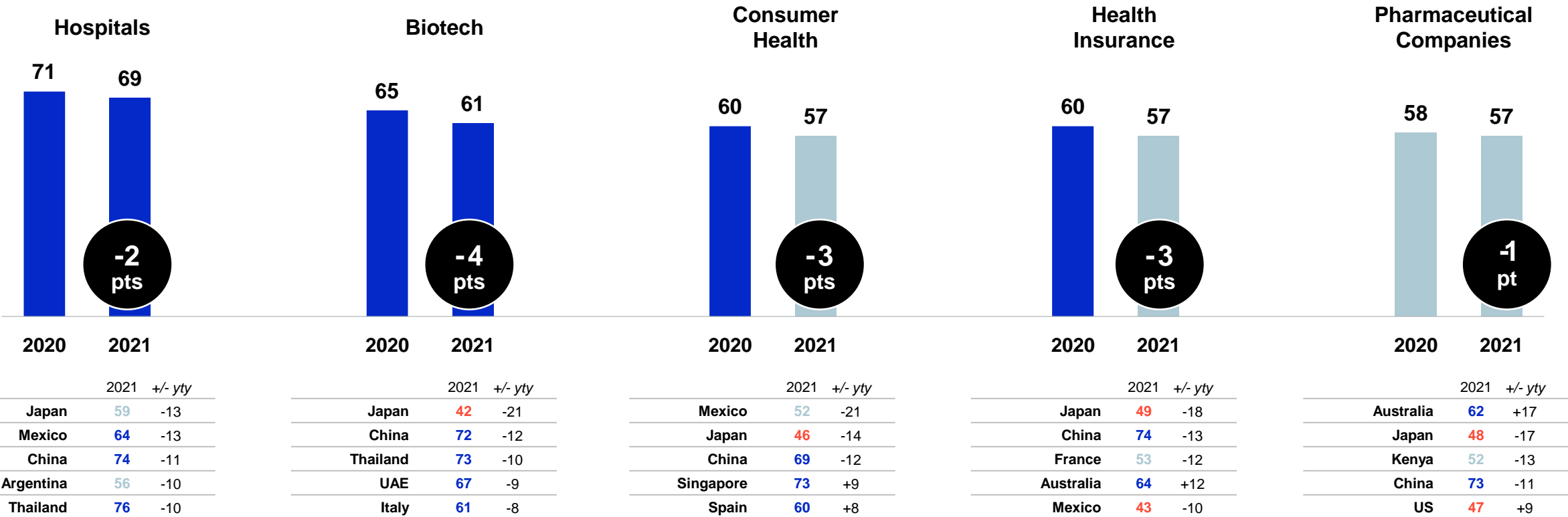
▲ All-time high in 12 countries



2021 Edelman Trust Barometer. TRU_IND. [HEALTHCARE] 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, 27-mkt avg. *Nigeria not included in the global average

TRUST DECLINES ACROSS HEALTHCARE SUBSECTORS

Percent trust



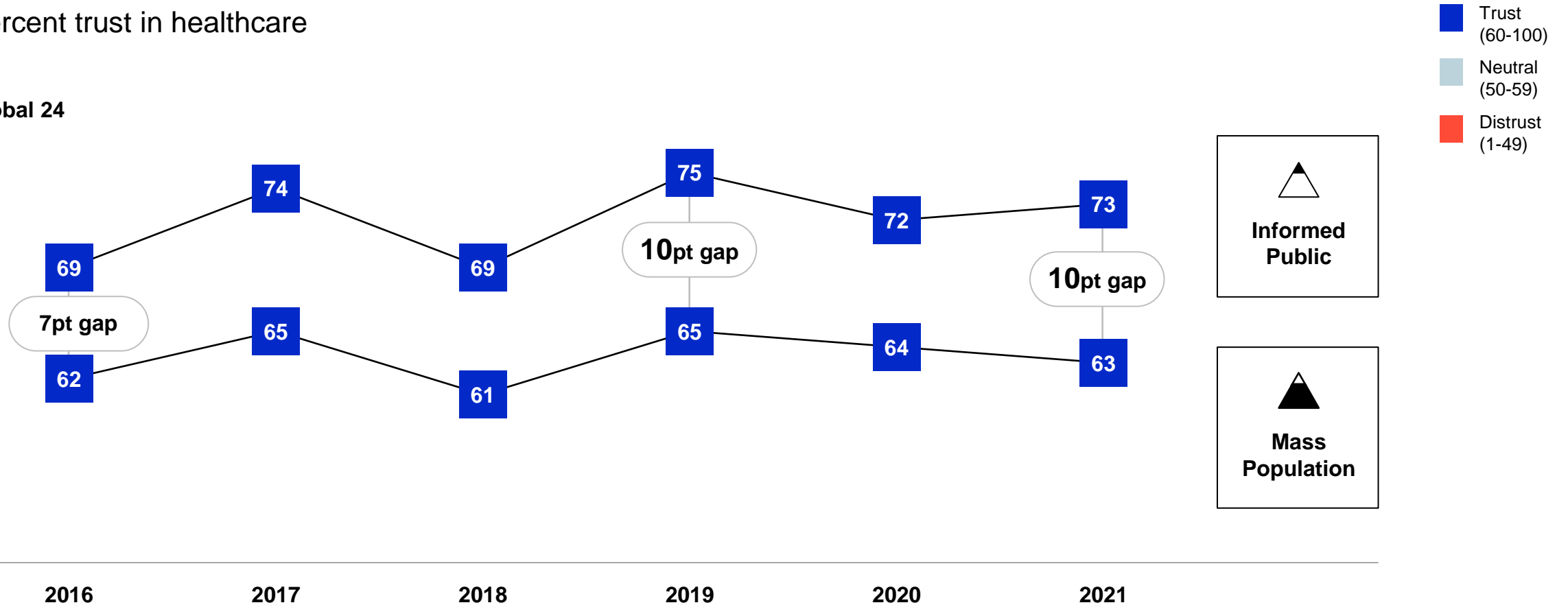
2021 Edelman Trust Barometer. TRU_SUB_HEA. Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria is not included in the global average

HEALTHCARE TRUST INEQUALITY RETURNS TO RECORD HIGHS

Percent trust in healthcare

Global 24

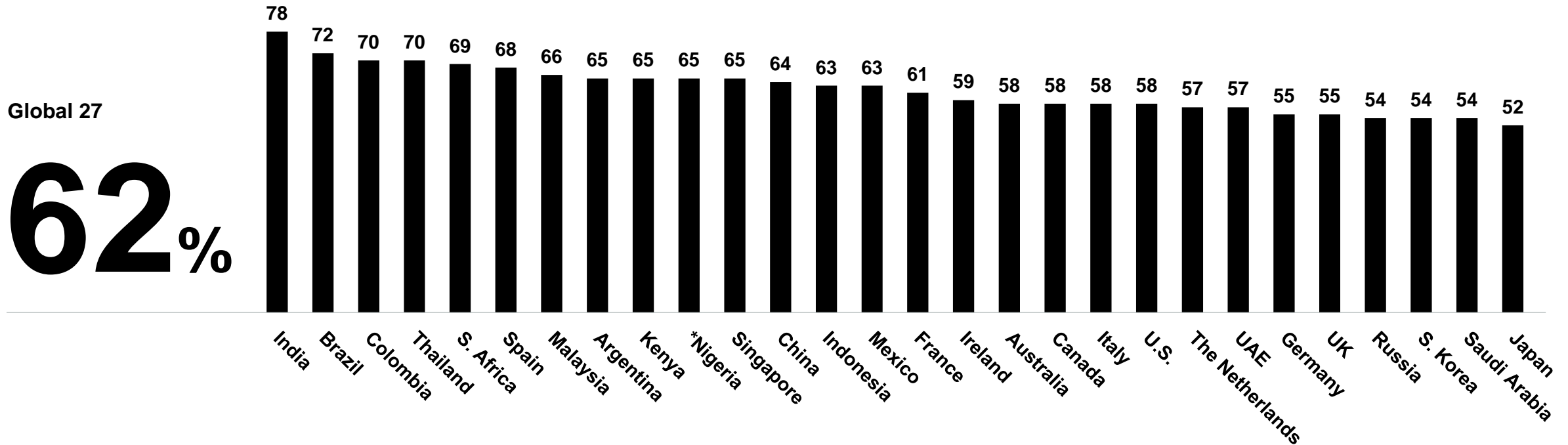


2021 Edelman Trust Barometer. TRU_IND. [HEALTHCARE] Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. Informed public and mass population, 24-mkt avg.

PANDEMIC BURDENING MOST VULNERABLE

Percent who agree

Those with **less education, less money and fewer resources are being unfairly burdened** with most of the suffering, risk of illness and need to sacrifice due to the pandemic



2021 Edelman Trust Barometer. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

IMPROVING HEALTHCARE TOPS LIST OF SOCIETAL PRIORITIES

Change in importance since last year
(more important minus less important)

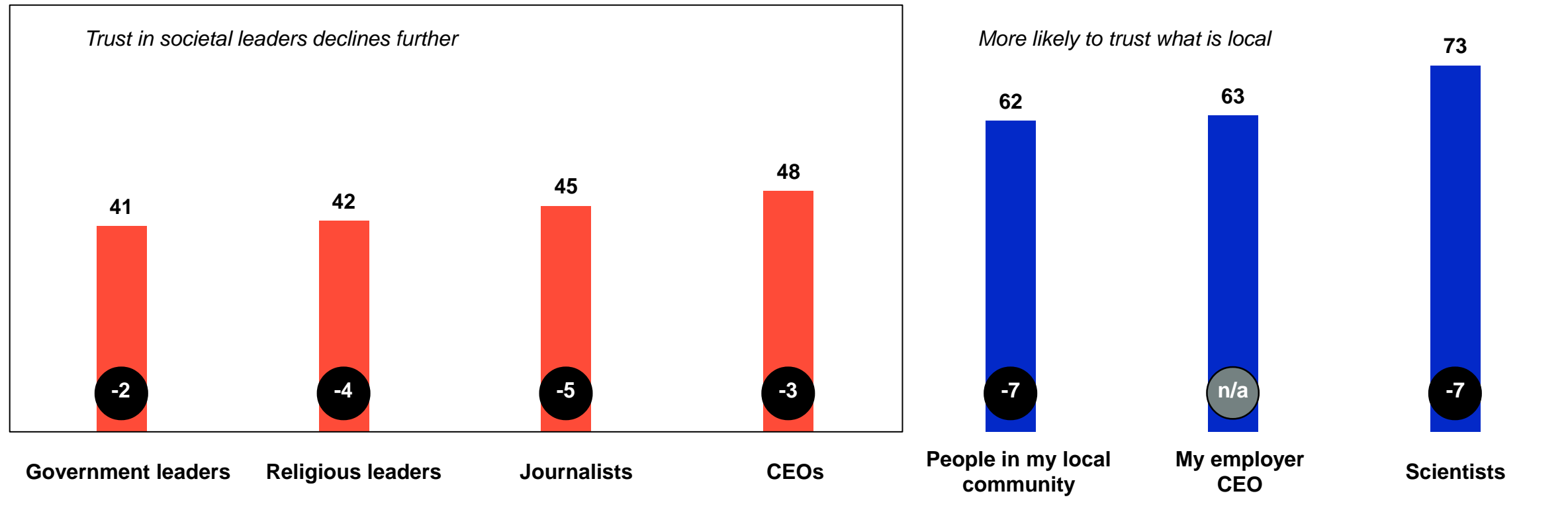
*Improving healthcare ranks as #1 priority
in 26 of 28 countries measured*

2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. General population, 27-mkt avg. Net change is the difference between more and less important.

<i>Change in importance since last year</i>	Net change	More Important	Less Important
Improving our healthcare system	+62	70	8
Addressing poverty in this country	+53	62	9
Improving our education system	+53	62	9
Addressing climate change	+51	61	10
Finding ways to combat fake news	+50	60	10
Protecting people's individual freedoms	+50	59	9
Closing the economic and social divide	+48	58	10
Addressing discrimination and racism	+42	53	11

SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust



2021 Edelman Trust Barometer. TRU_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. Attributes shown to half of the sample; "My employer CEO" only shown to those that are an employee (Q43/1). General population, 27-mkt avg.

SOCIETAL LEADERS AND MEDIA SUSPECTED OF LIES AND MISINFORMATION

Percent who worry

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

⊥

57%

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

⊥

56%

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

⊥

59%

BELIEVE SCIENTISTS MOTIVATED BY FINANCIAL, POLITICAL AGENDAS

Percent who agree

I believe that **scientists design their research to ensure that their results will support their, or their employer's financial gain**

⊥

54%

The **government exerts pressure on its scientists to express support for its policies** even if that means contradicting what the data and research actually say

⊥

50%

I believe that **scientists design their research to ensure that their results will support their own political agendas**

⊥

48%

PUBLIC HEALTH EXPERTS LOSE TRUST DURING PANDEMIC

Percent trust

Global 11



*Change,
May 2020 to
Jan 2021*



*Change,
May 2020 to
Jan 2021*

Percent who agree

Global 27

46%

It has been difficult for them to find reliable and trustworthy information about the virus and its effects

⌊

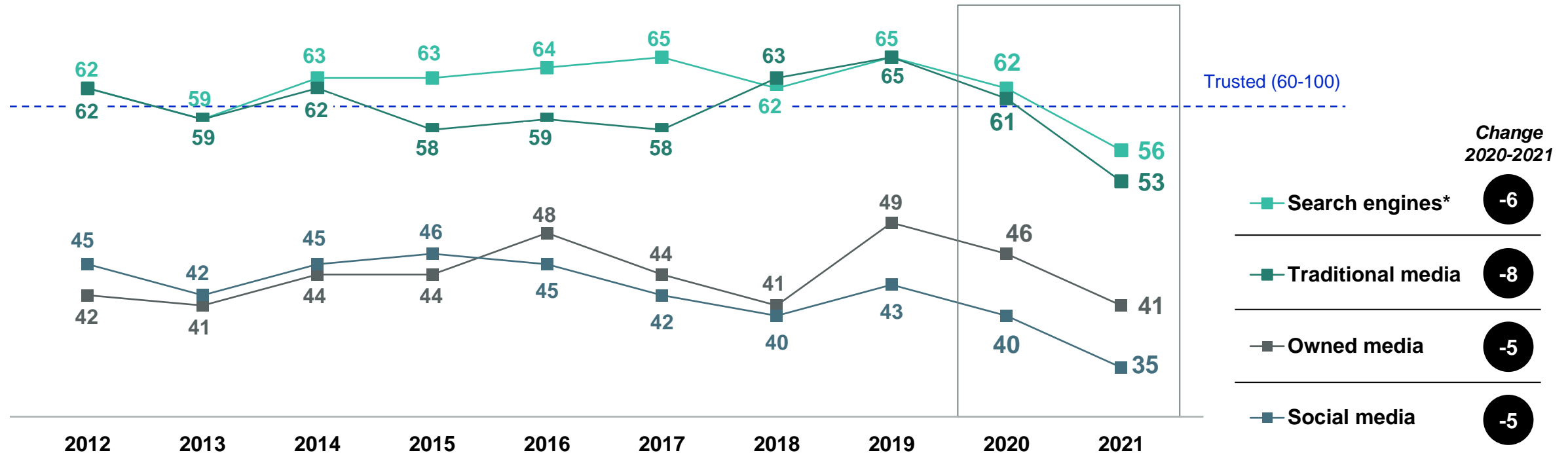
RAGING INFODEMIC FURTHER THREATENS PUBLIC HEALTH

⌋

TRUST IN ALL INFORMATION SOURCES AT RECORD LOWS

Percent trust in each source for general news and information

Global 22

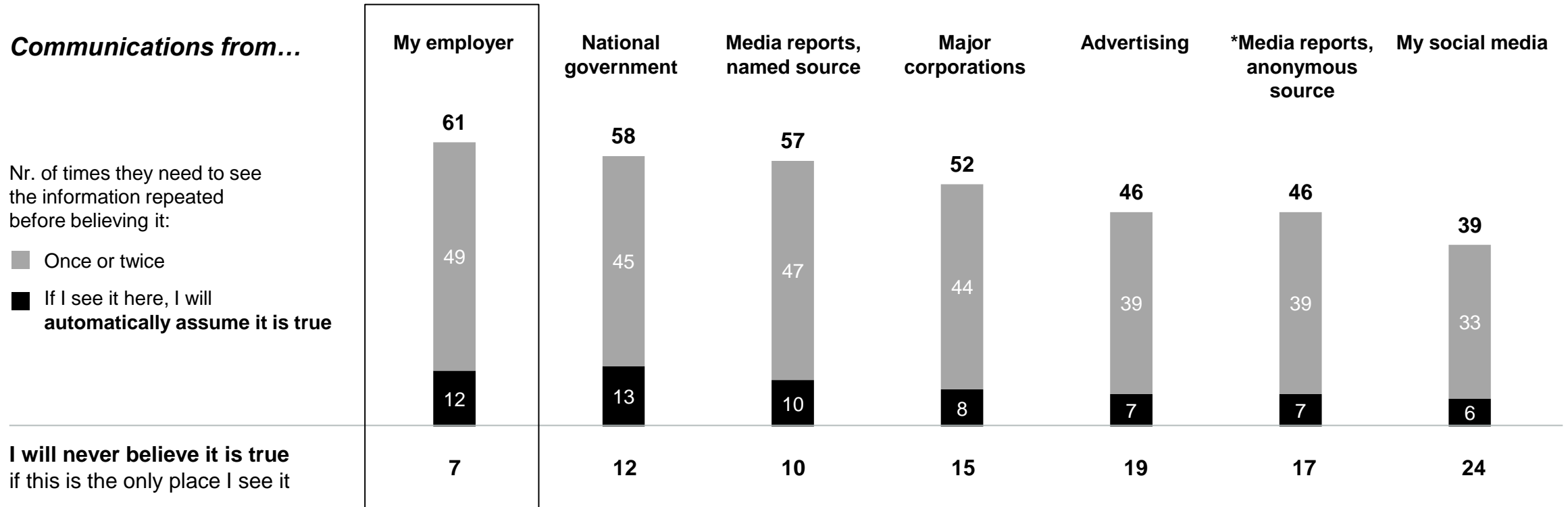


2021 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg.

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

EMPLOYER MEDIA MOST BELIEVABLE

Percent who believe information from each source automatically, or after seeing it twice or less



2021 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample. "Once or twice" is a sum of codes 2 and 3. General population, 27-mkt avg. "Employer communications" only shown to those that are an employee (Q43/1).

*"Media reports, anonymous source" excludes Canada and France.

PRIORITIES SHIFT: MY INFORMATION LITERACY NOW MATTERS MORE

Change in importance since last year
(more important minus less important)

<i>Change in importance since the start of the year...</i>	Net change	More Important	Less Important
Prioritizing my family and their needs	+56	64	8
Increasing my media and information literacy	+46	55	9
Increasing my science literacy	+43	52	9
Being politically aware	+39	51	12
Speaking out when I see the need for changes and reforms	+36	47	11

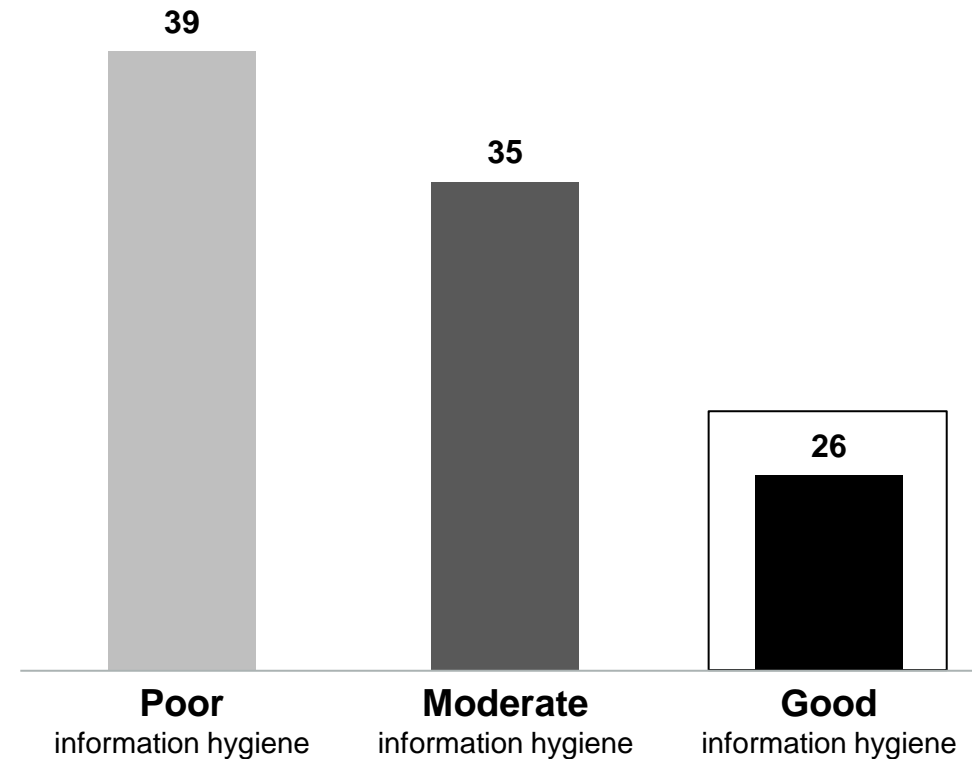
2021 Edelman Trust Barometer. IMP_VALUES. For each of the following, please indicate whether it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. Question asked of half of the sample. General population, 27-mkt avg. Net change is the difference between more and less important.

ONLY 1 IN 4 HAVE GOOD INFORMATION HYGIENE

Percent in each segment

Information hygiene:

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

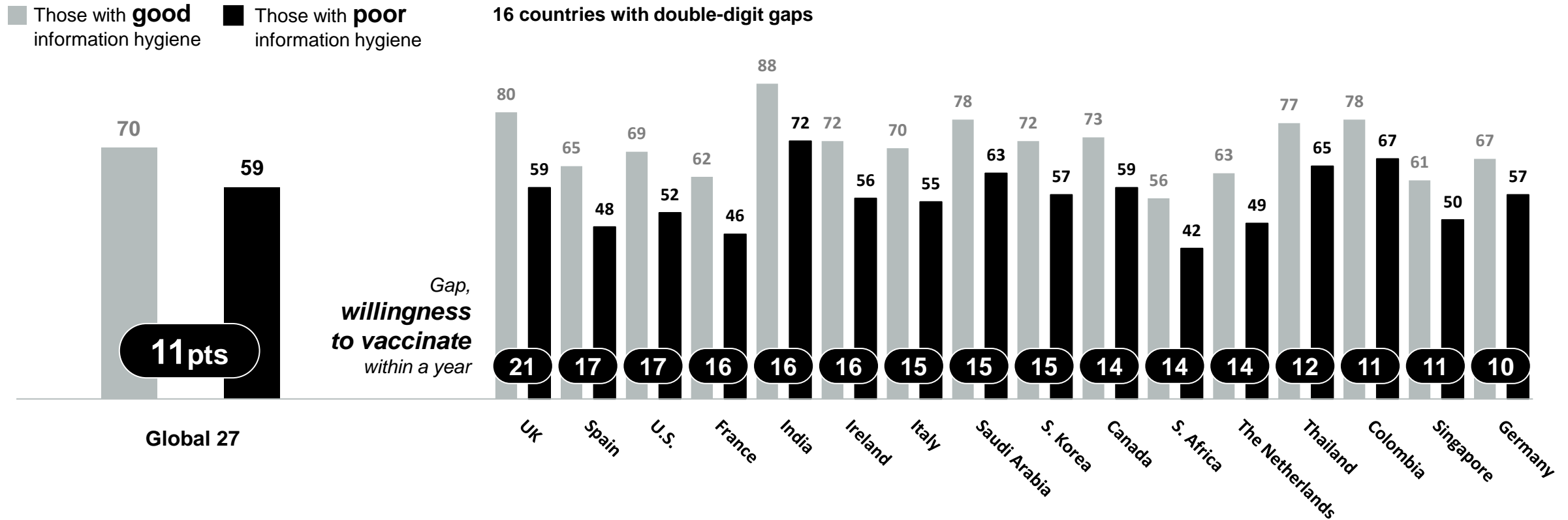


57% of respondents **share or forward news items** that they find to be interesting

Of those, **only 29%** have good information hygiene

POOR INFORMATION HYGIENE THREATENS PANDEMIC RECOVERY

Percent who say they will take the COVID-19 vaccine within a year



2021 Edelman Trust Barometer. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half of the sample. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg, by hygiene level. For full details on how the Information Hygiene Scale was built, please refer to the Technical Appendix.

⊥

BUILDING TRUST IN THE HEALTHCARE SECTOR

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BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Percent who agree

CEOs should step in
when the government does not fix societal problems

⊥
68%

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

⊥
66%

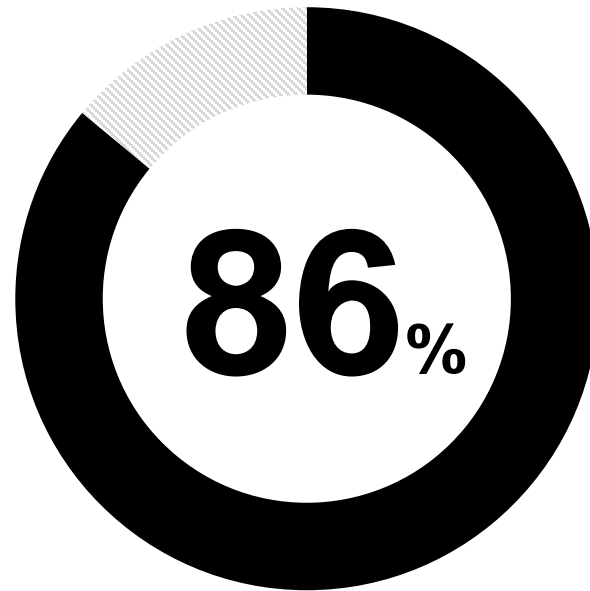
CEOs should hold themselves accountable to the public and not just to the board of directors or stockholders

⊥
65%

2021 Edelman Trust Barometer. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? 3-point scale, sum of codes 2 and 3. Question asked of half of the sample. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 27-mkt avg.

CEOS MUST LEAD ON SOCIETAL ISSUES

I expect **CEOs to publicly speak out** about one or more of these societal challenges



Pandemic impact	59
Job automation	51
Societal issues	43
Local community issues	40

BUSINESS GAINS THE MOST TRUST BY BEING A GUARDIAN OF INFORMATION QUALITY

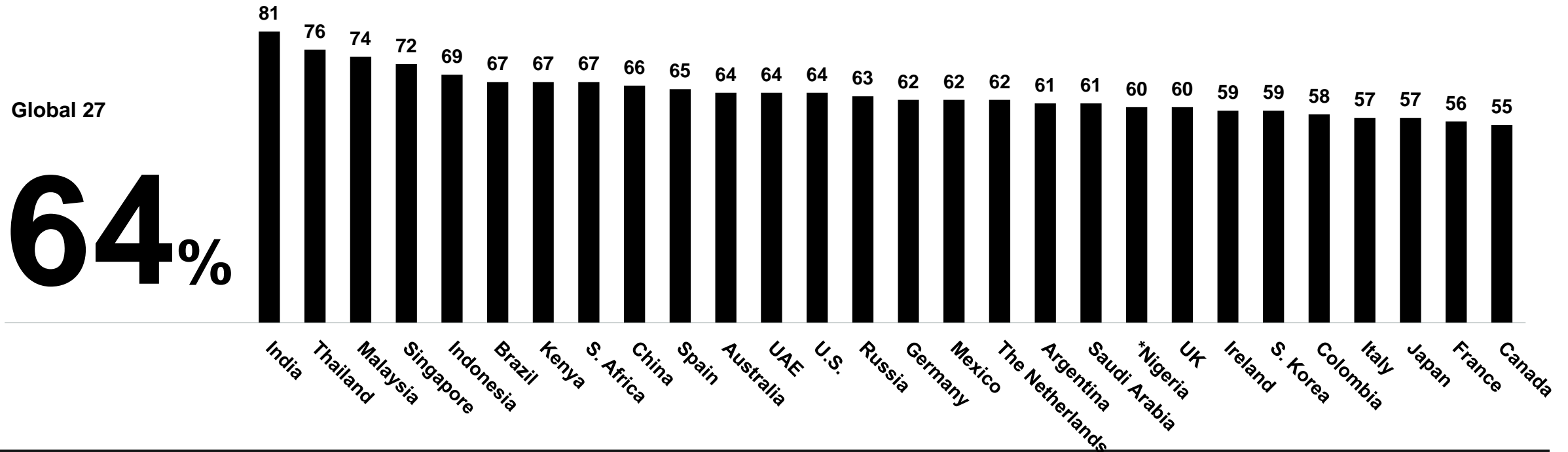
Percent increased likelihood of trusting business associated with performing well on each action

<i>When these actions are performed well...</i>	Increased likelihood of trust
Guarding information quality	+5.8%
Embracing sustainable practices	+5.7%
Robust COVID-19 health and safety response	+4.8%
Driving economic prosperity	+4.7%
Long-term thinking over short-term profits	+4.6%

TRANSPARENCY AND EDUCATION ESSENTIAL TO BUILDING TRUST IN VACCINE

Percent who agree

I will need to **understand the science and development process** used to create a COVID-19 vaccine **before I will fully trust that it is safe**



2020 Edelman Trust Barometer. SCI_TRUST. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

URGENT NEED TO ADDRESS VACCINE HESITANCY AMONG HEALTHCARE WORKERS

Percent who say they will take the COVID-19 vaccine within the next year, among sector employees

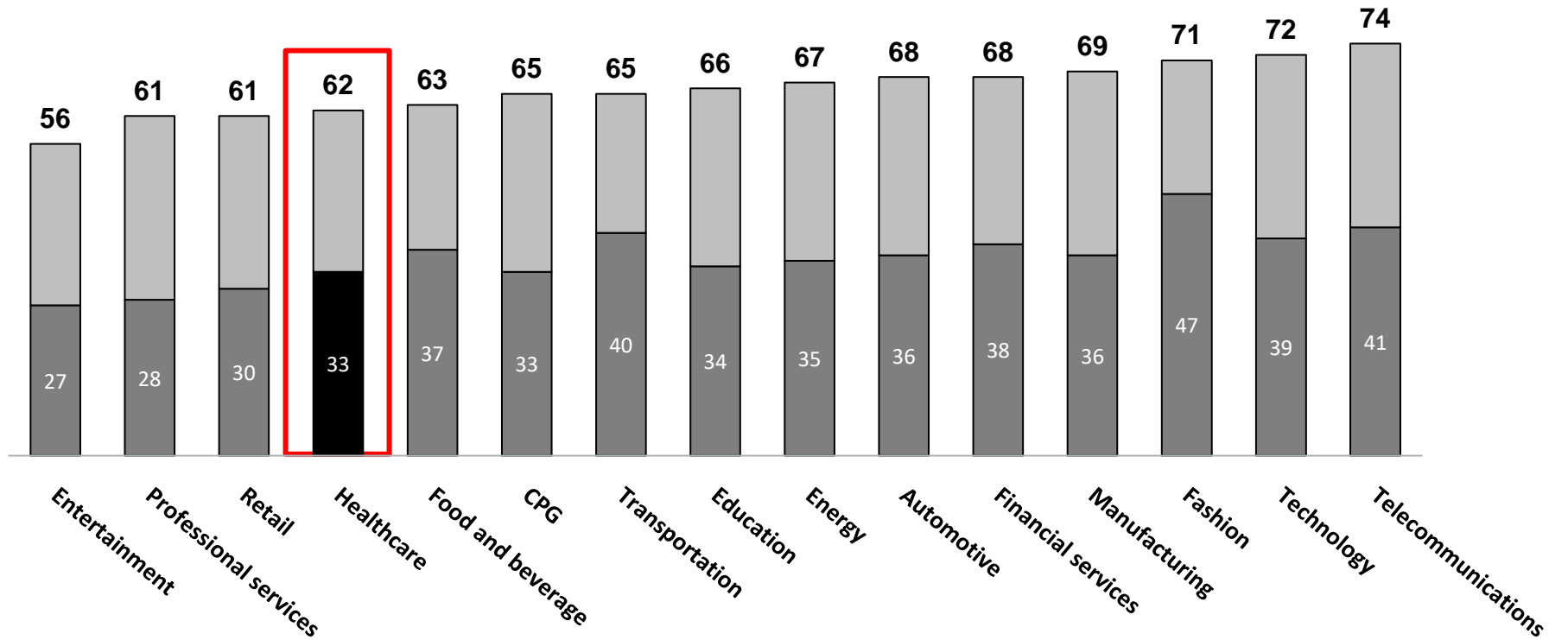
All employees, global 27

65%

Willing to vaccinate...

34	Six months to one year
31	As soon as possible

Only 1 in 3 ready to take the vaccine as soon as possible



2021 Edelman Trust Barometer. VACCINE1. If and when a COVID-19 vaccine becomes available will you take it? Code 1, yes as soon as possible; code 2, yes, within a year. Question asked of half of the sample. General population, 27-mkt avg., and among those employed in each sector (Q43/1 AND Q420).

CONSUMERS AND EMPLOYEES EXPECTED TO HAVE A SEAT AT THE TABLE

Percent who agree

68%

Consumers ...

**have the power to force
corporations to change**

62%

Employees ...

47%

of those who are
employed in
Healthcare sector

I am more likely now than a year
ago to voice my objections to
management or **engage in
workplace protest**

EMERGING FROM INFORMATION BANKRUPTCY

1

Business: Embrace expanded mandate

Be a leader and speak out on social issues – especially how you plan to improve the healthcare system and keep people safe.

2

Lead with facts, act with empathy

Healthcare leaders must apply straight talk to their scientific milestones, as well as address people's fears with empathy.

3

Provide trustworthy content

Be a concrete source of information, especially on vaccines, and help increase science literacy levels.

4

Don't go it alone

Healthcare companies must partner with government, NGOs and each other to solve societal problems, particularly the pandemic and inequities.

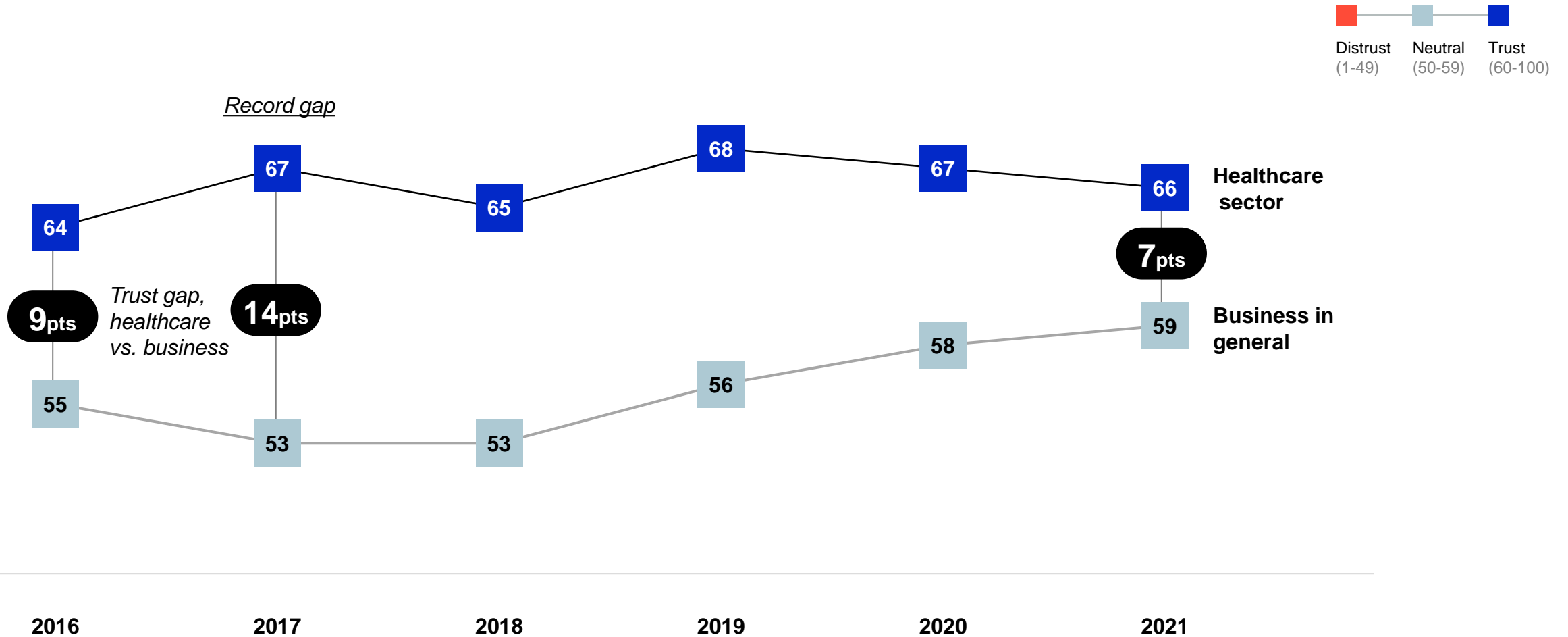
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APPENDIX

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TRUST IN HEALTHCARE AHEAD OF BUSINESS

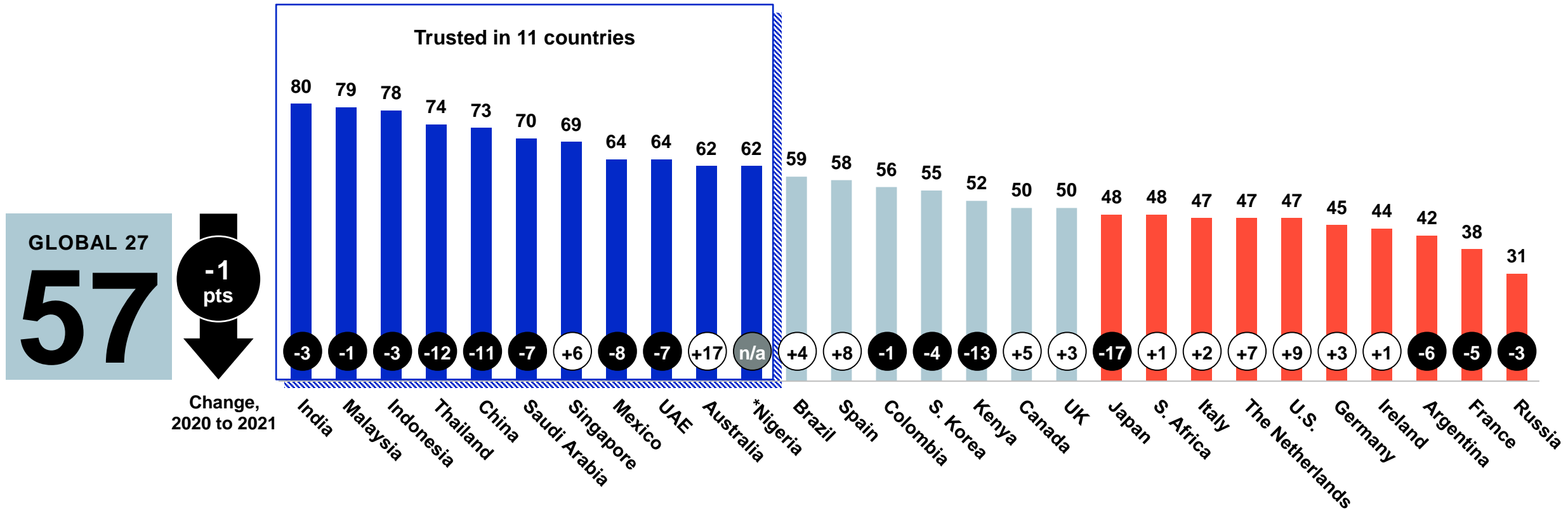
Percent trust in the healthcare sector



2021 Edelman Trust Barometer. TRU_IND. [HEALTHCARE] 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. TRU_INS. [BUSINESS] 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, 22-mkt avg.

TRUST IN PHARMACEUTICAL COMPANIES DECREASES IN 15 OF 27 COUNTRIES

Percent trust



2021 Edelman Trust Barometer. TRU_SUB_HEA. [PHARMACEUTICAL COMPANIES] Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria is not included in the global average

TRUST IN BIOTECH/LIFE SCIENCES DECREASES IN 20 OF 27 COUNTRIES

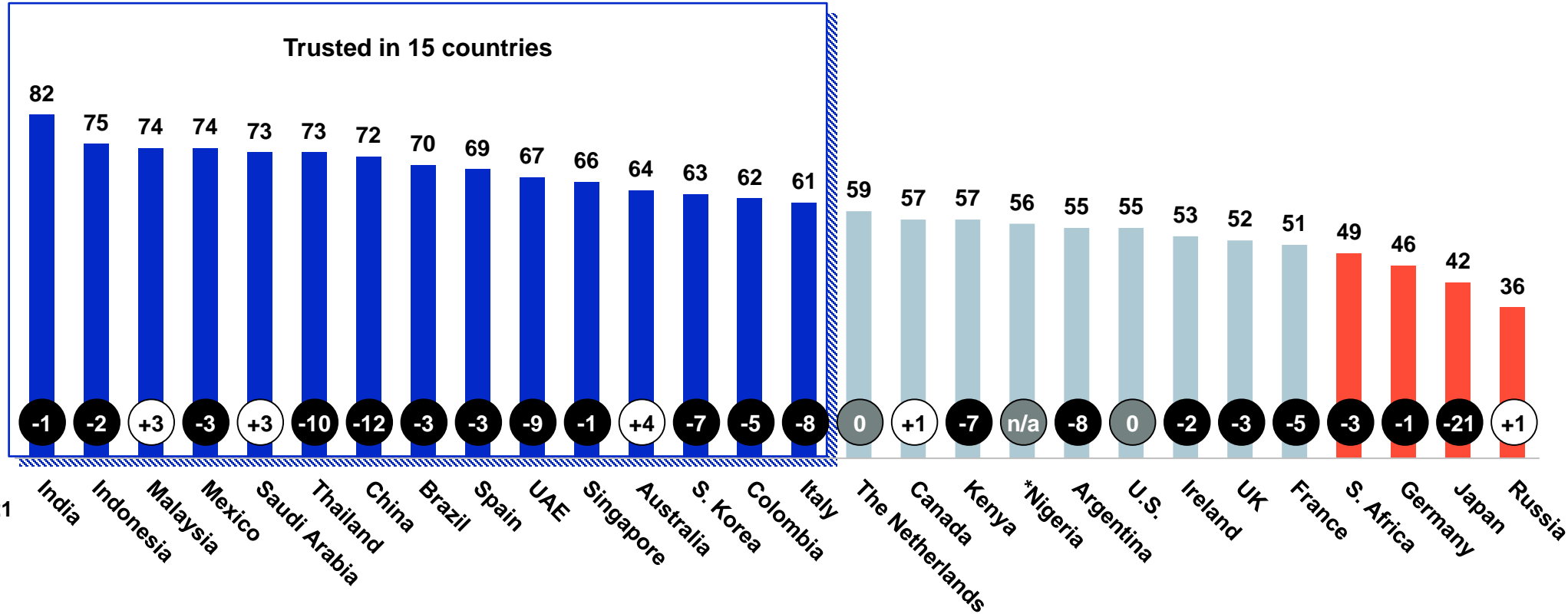
Percent trust



GLOBAL 27
61

-4 pts

Change, 2020 to 2021

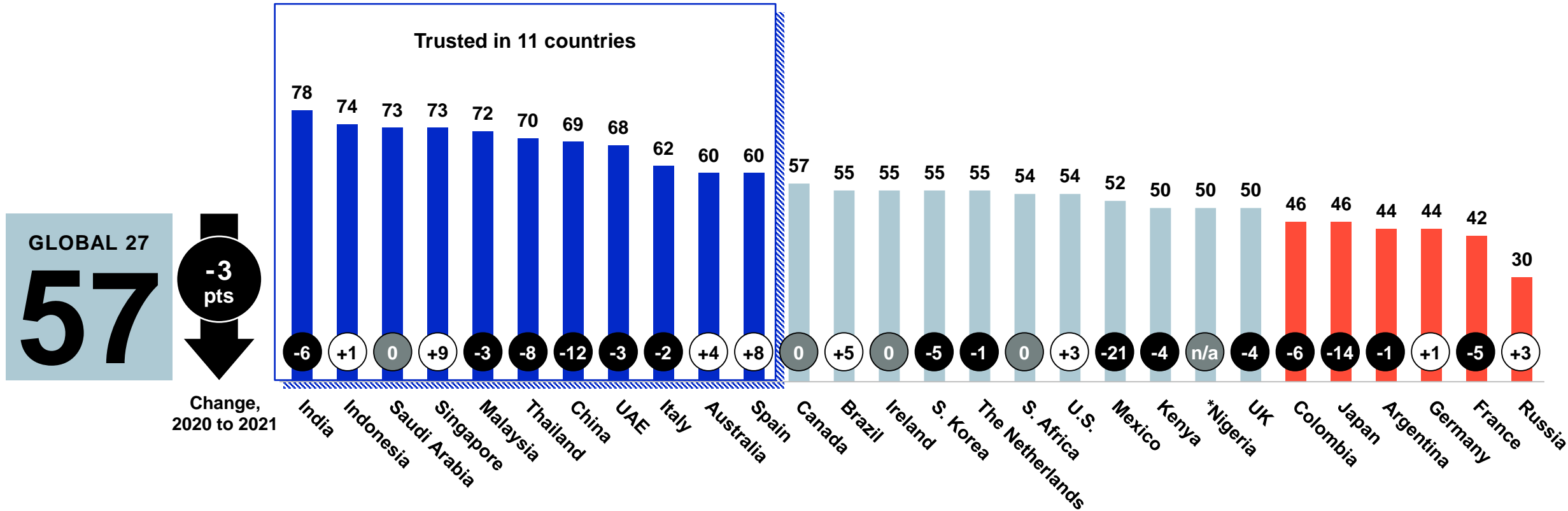


2021 Edelman Trust Barometer. TRU_SUB_HEA. [BIOTECH/LIFE SCIENCES] Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria is not included in the global average

TRUST IN CONSUMER HEALTH DECREASES IN 15 OF 27 COUNTRIES

Percent trust

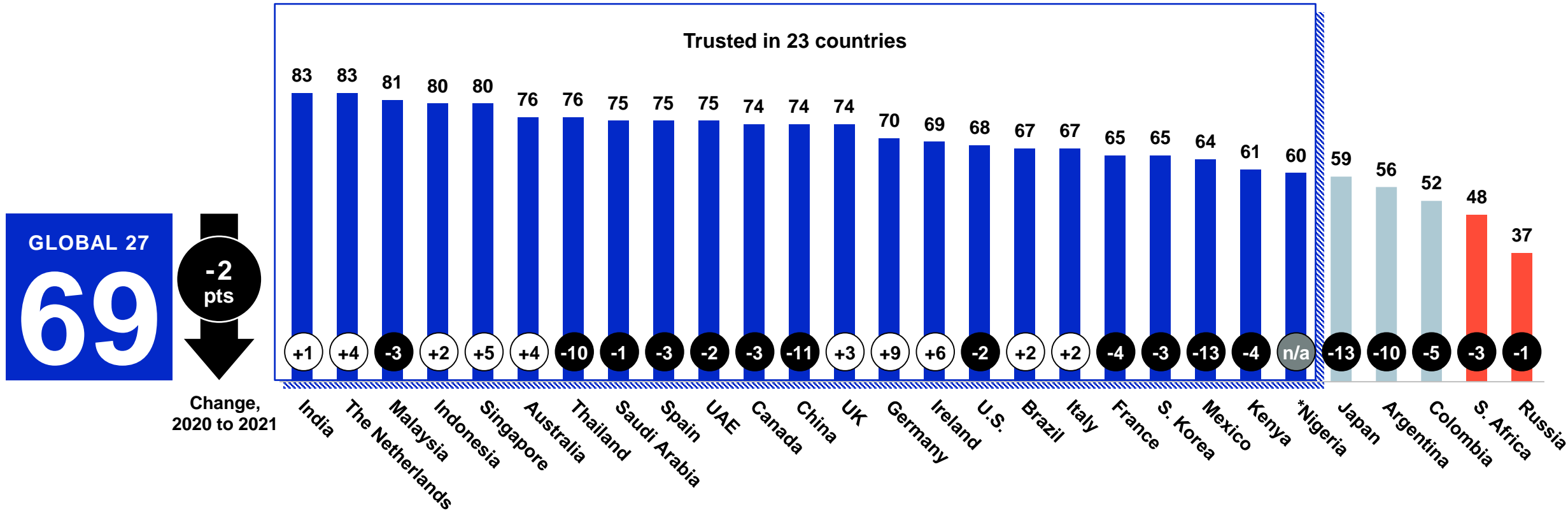


2021 Edelman Trust Barometer. TRU_SUB_HEA. [CONSUMER HEALTH] Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria is not included in the global average

TRUST IN HOSPITALS DECREASES IN 17 OF 27 COUNTRIES

Percent trust



2021 Edelman Trust Barometer. TRU_SUB_HEA. [HOSPITALS] Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria is not included in the global average

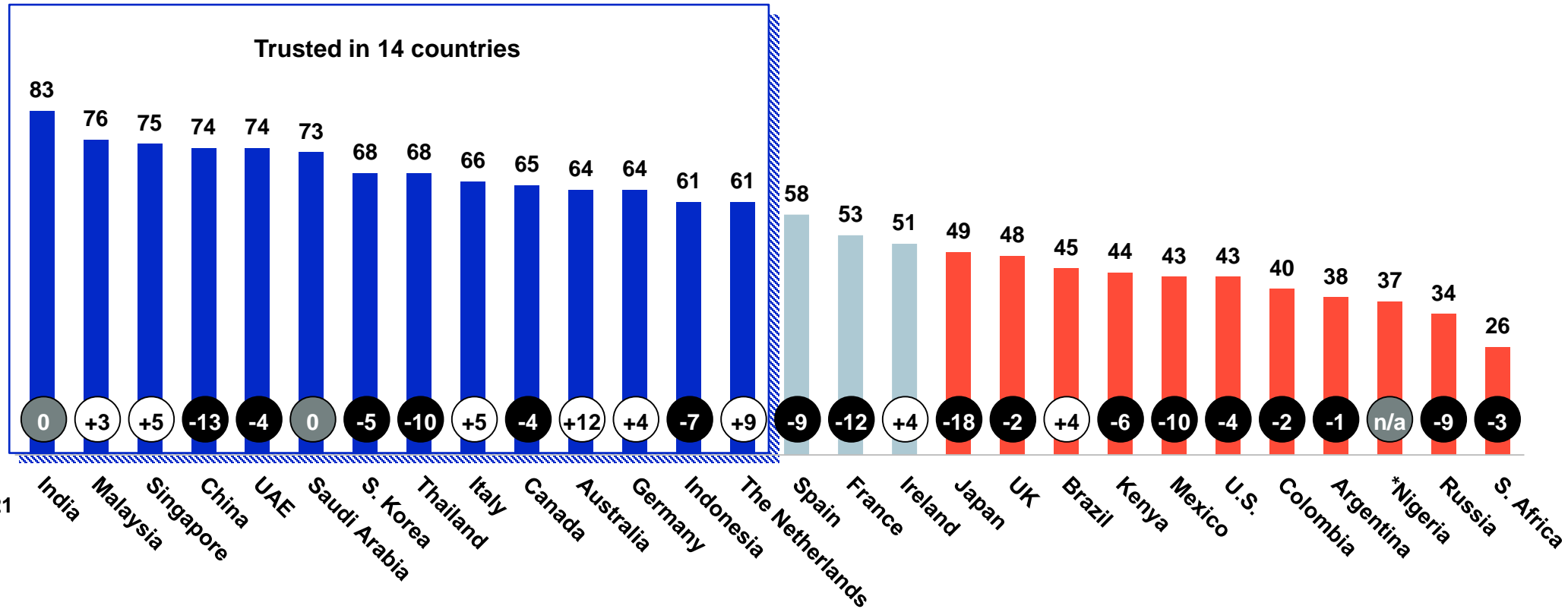
TRUST IN HEALTH INSURANCE DECREASES IN 17 OF 27 COUNTRIES

Percent trust



GLOBAL 27
57

-3 pts
Change, 2020 to 2021



2021 Edelman Trust Barometer. TRU_SUB_HEA. [HEALTH INSURANCE] Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

*Nigeria is not included in the global average