



2019 EDELMAN TRUST BAROMETER

Trust in Healthcare: Global

#TrustBarometer



19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

All fieldwork was conducted between
October 19 and November 16, 2018

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% (26,000+), half-sample global general online population +/- 0.8 (N=15,525).

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 739, varies by market).

Employee MOE: 27-market = +/- 0.8% (N=16,944)

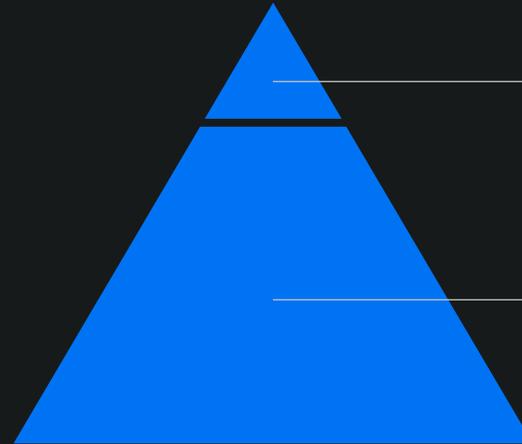
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

General Online Population

1,150 respondents per market

Ages 18+

All slides show general online
population data unless otherwise noted



Informed Public

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

Represents 16% 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 84% of total global population

2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed)

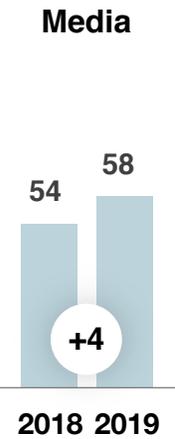
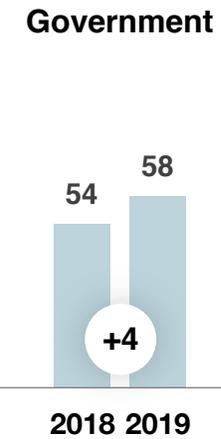
Oversample of employees of multinational companies: 500 respondents per market

A MODEST RISE IN TRUST

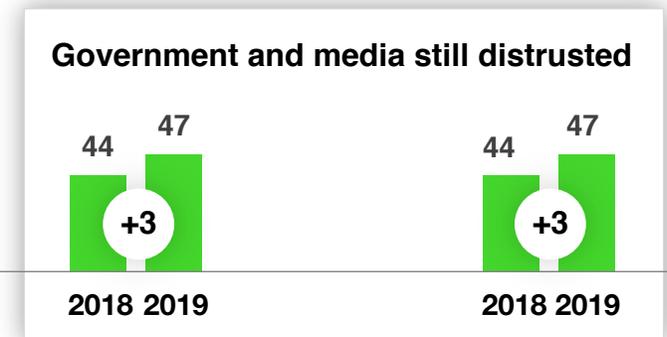
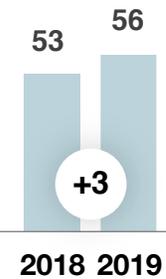
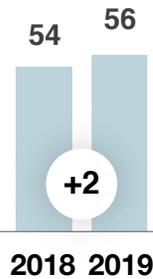
Percent trust



 **Informed public**

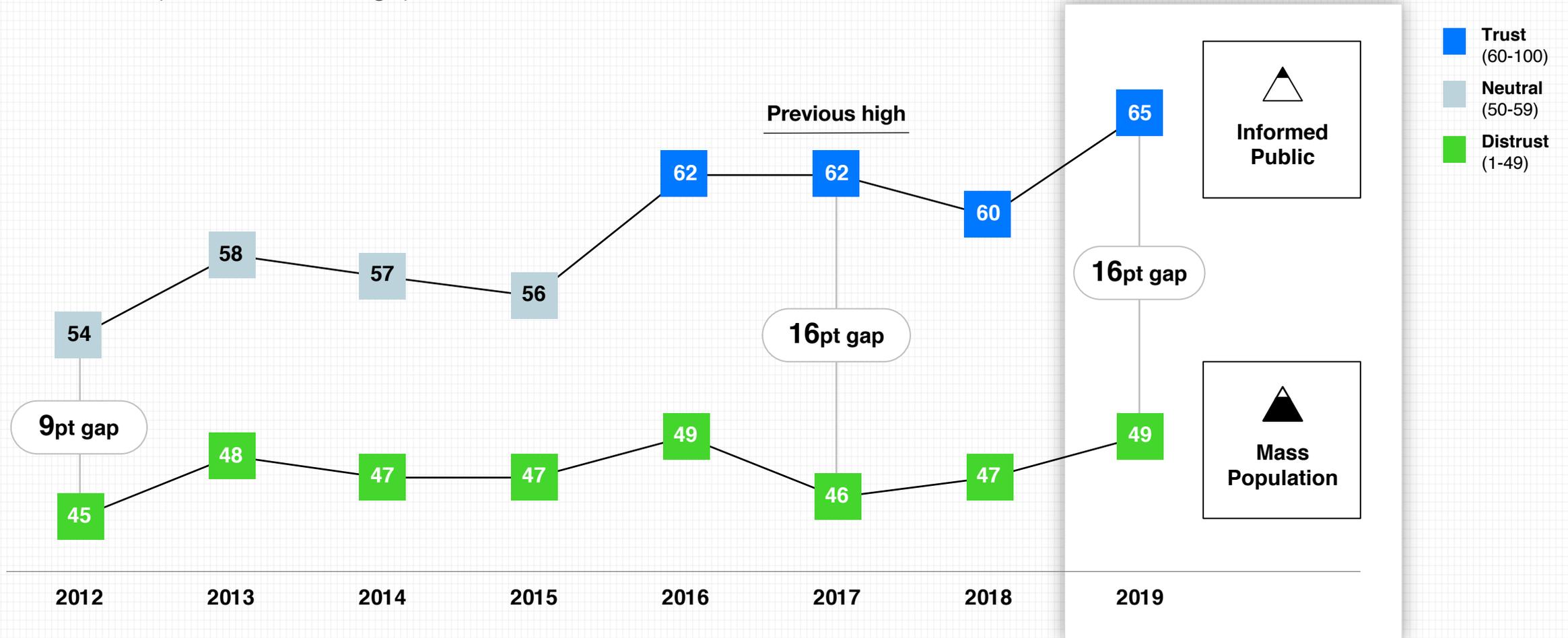


 **General population**



TRUST INEQUALITY RETURNS TO RECORD HIGHS

Trust Index (23-market average)

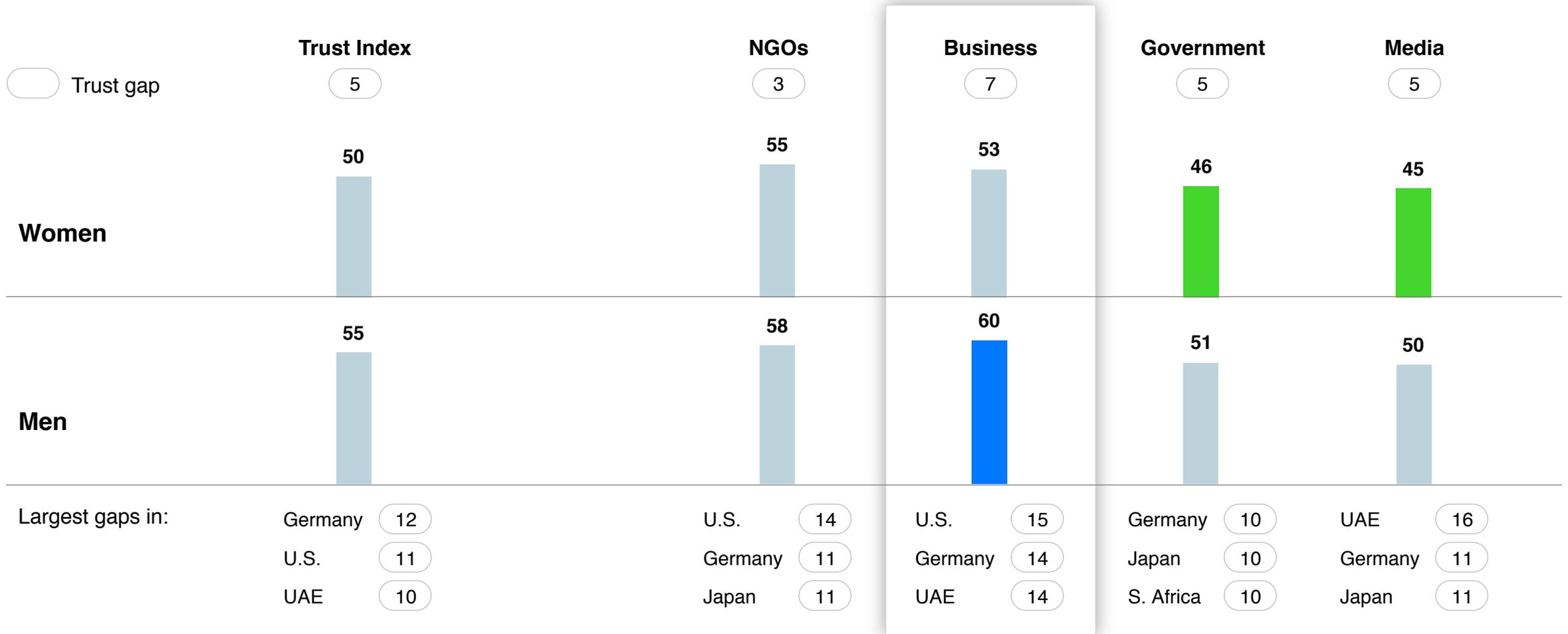


2019 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Informed public and mass population, 23-market average.

DIVIDED ALONG GENDER LINES

Percent trust

■ Distrust ■ Neutral ■ Trust



2019 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 using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. General population, 27-market average, by gender.

FEARS OF JOB LOSS REMAIN HIGH

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

Not having the **training** and skills necessary to get a good paying job

Automation and/or other innovations taking your job away

International conflicts about **trade policies** and **tariffs** hurting the company you work for

All employees

59%

55%

57%

Multinational employees

63%

60%

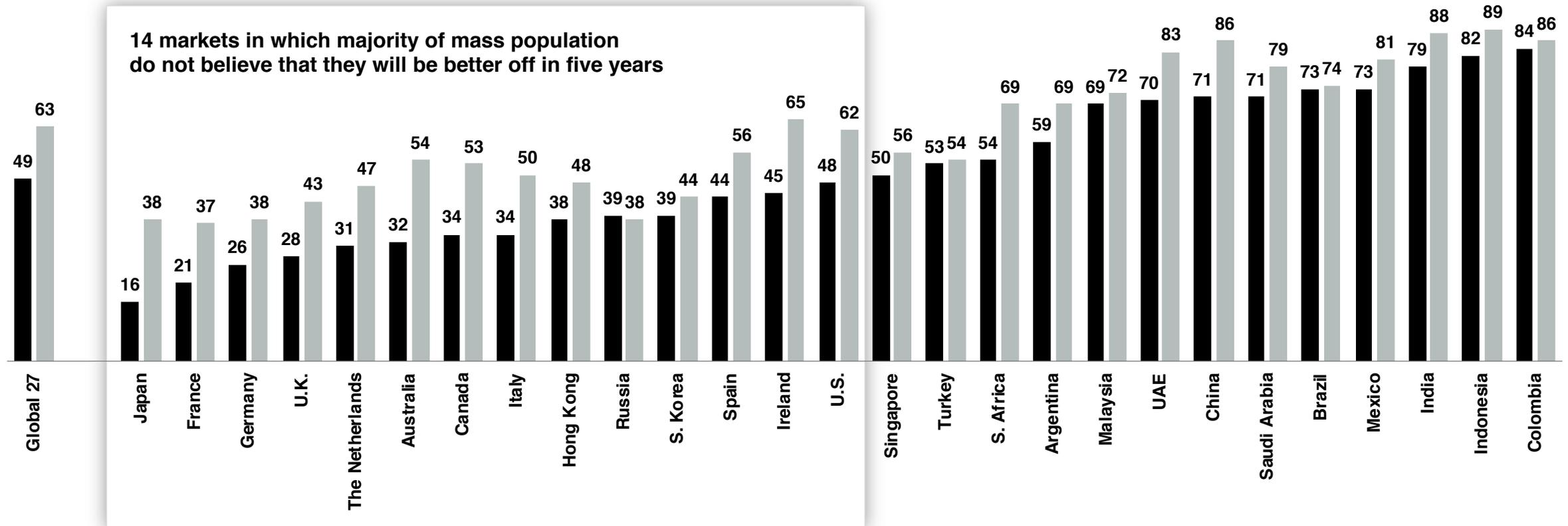
64%

2019 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? Please indicate your answer using a nine-point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". 9-point scale; top 4 box, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, 27-market average.

DEVELOPED WORLD PESSIMISTIC ABOUT FUTURE

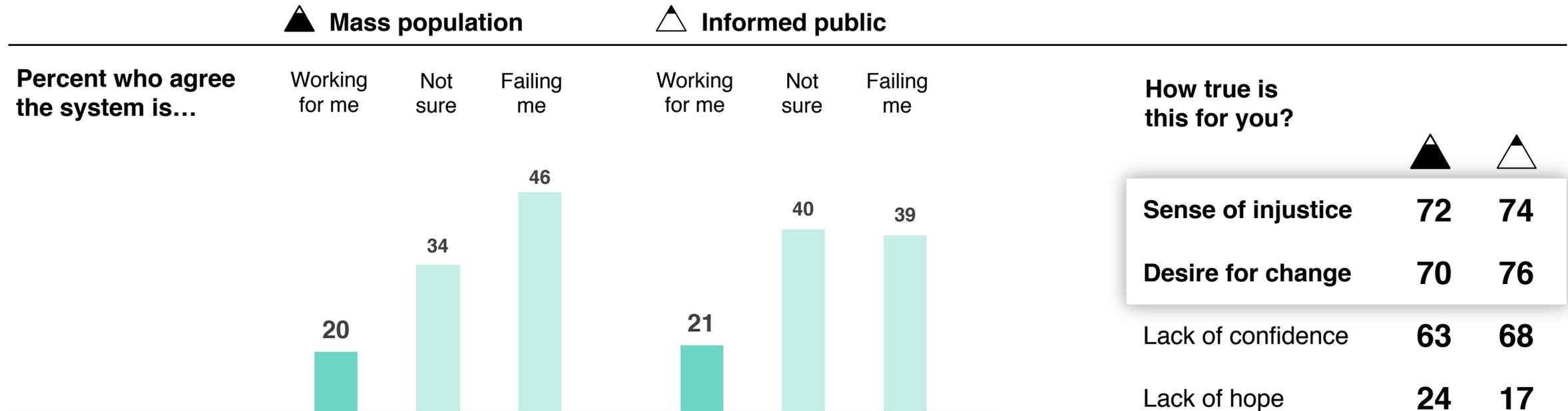
Percent who believe they and their families will be better off in five years' time

■ Mass population ■ Informed public



2019 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. Informed public and mass population, 27-market average.

ONLY 1 IN 5 BELIEVE THE SYSTEM IS WORKING FOR THEM



2019 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 using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. 9-point scale; top 4 box, true. Informed public and mass population, 27-market average. 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].

THEY'RE TAKING CHANGE INTO THEIR OWN HANDS



“Yellow Vests” demonstrate for economic justice



India’s “Women’s Wall” demonstrate for equality

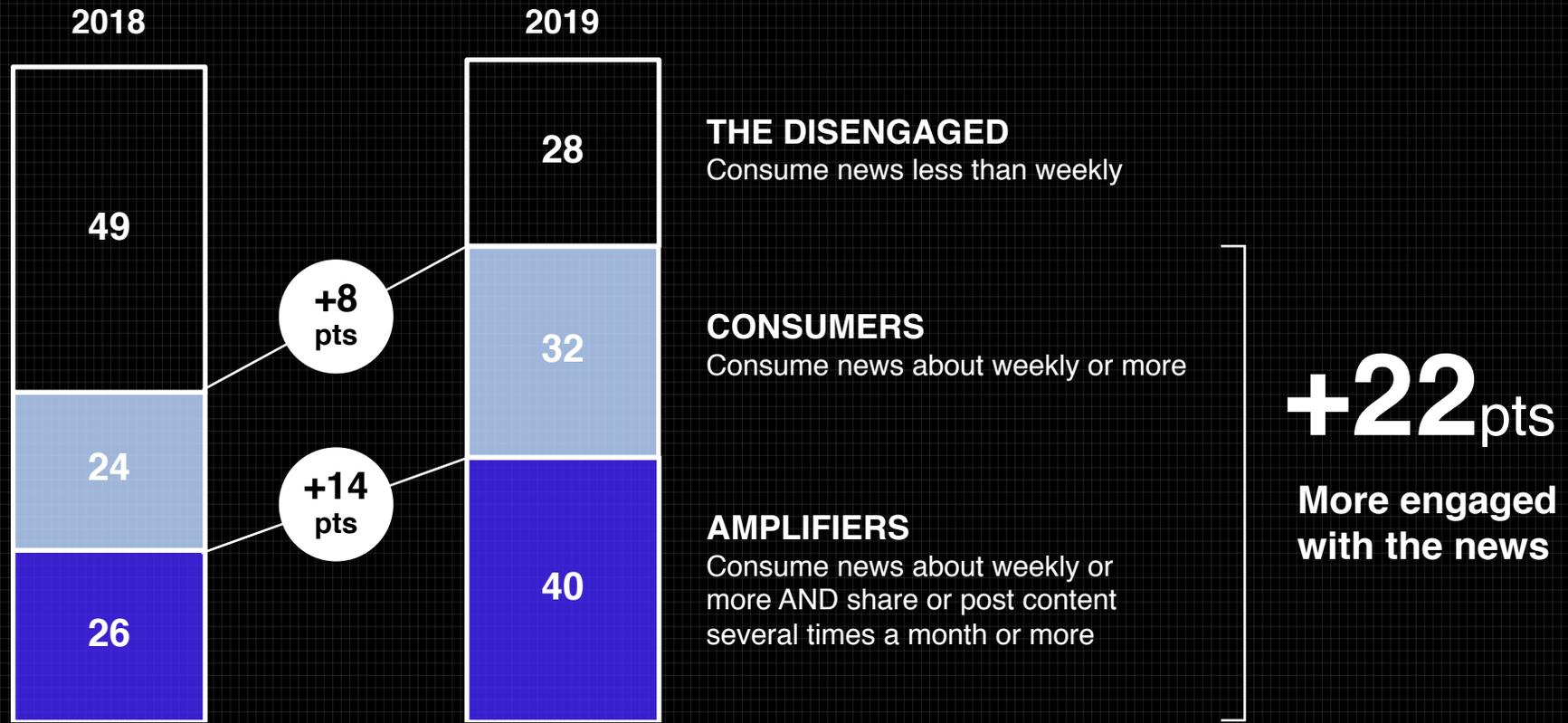


Protests at pharma campuses against insulin price hikes

MASSIVE RISE IN NEWS ENGAGEMENT

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

- 0 + Y-to-Y Change



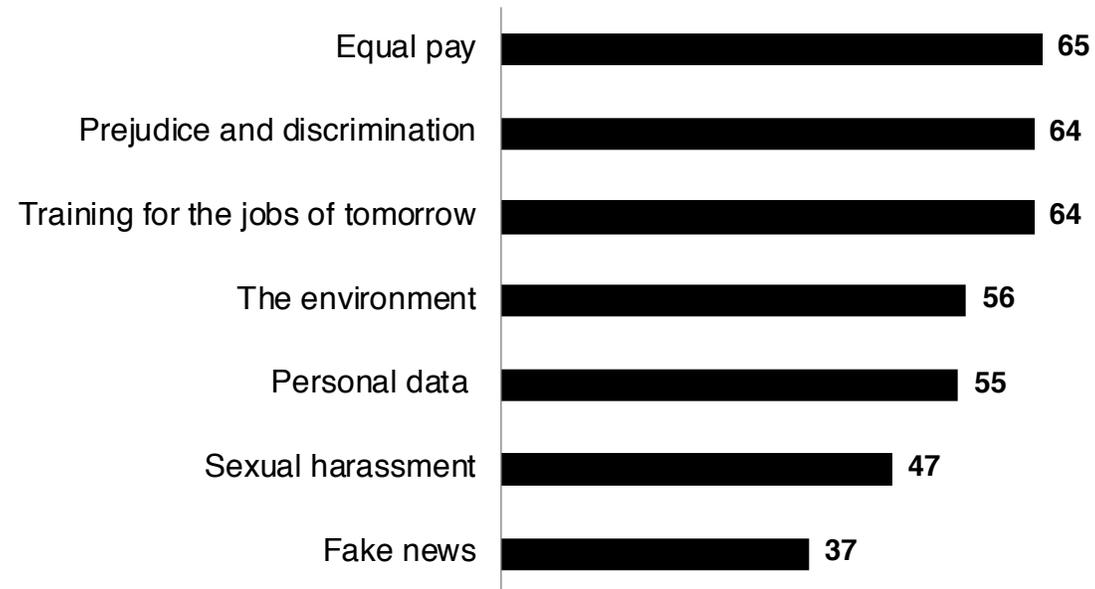
2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. General population, 26-market average. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

LOOKING FOR LEADERSHIP FROM CEOS

Percent who say that CEOs should take the lead on change rather than waiting for government to impose it

76%  **+11pts**

Percent who agree CEOs can create positive change in:

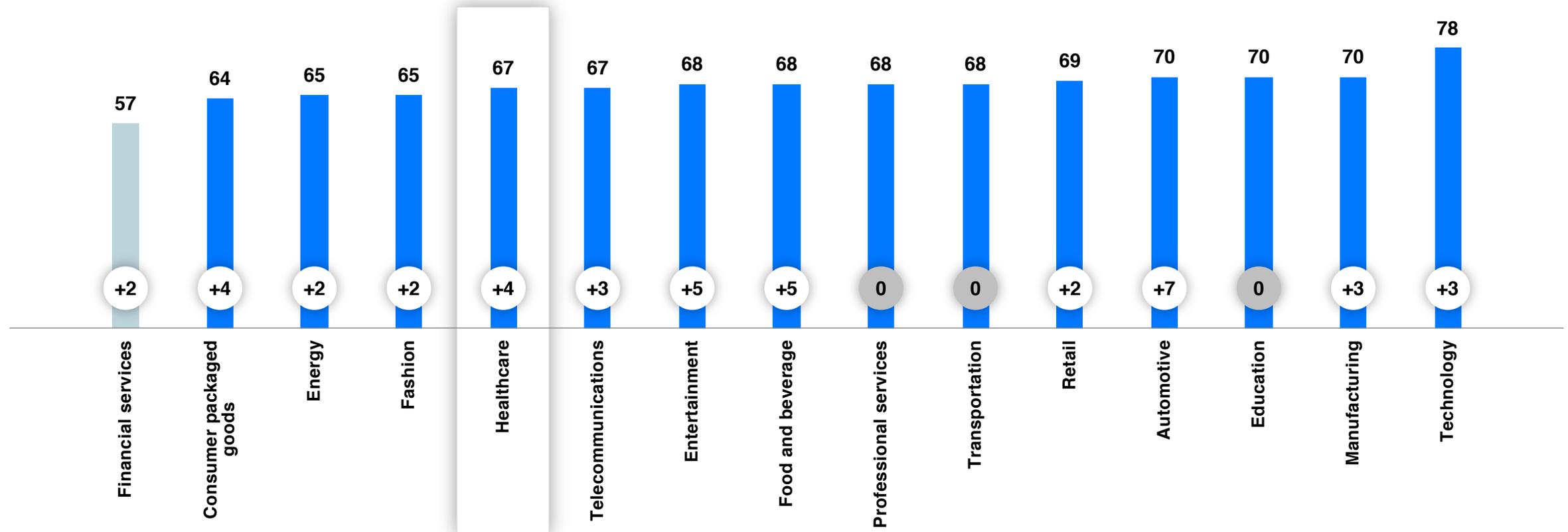




The State of Trust in Healthcare

TRUST IN HEALTHCARE KEEPS PACE WITH OTHER SECTORS

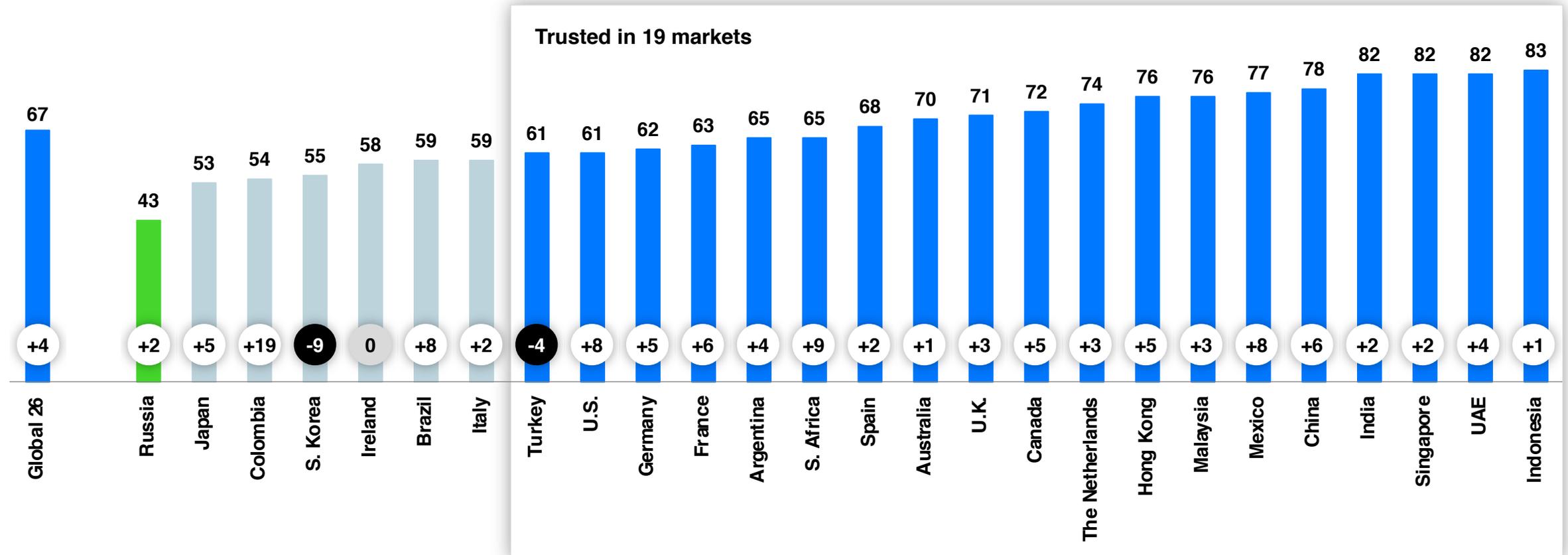
Percent trust in each sector



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

TRUST IN HEALTHCARE INCREASES IN 23 OF 26 MARKETS

Percent trust in healthcare

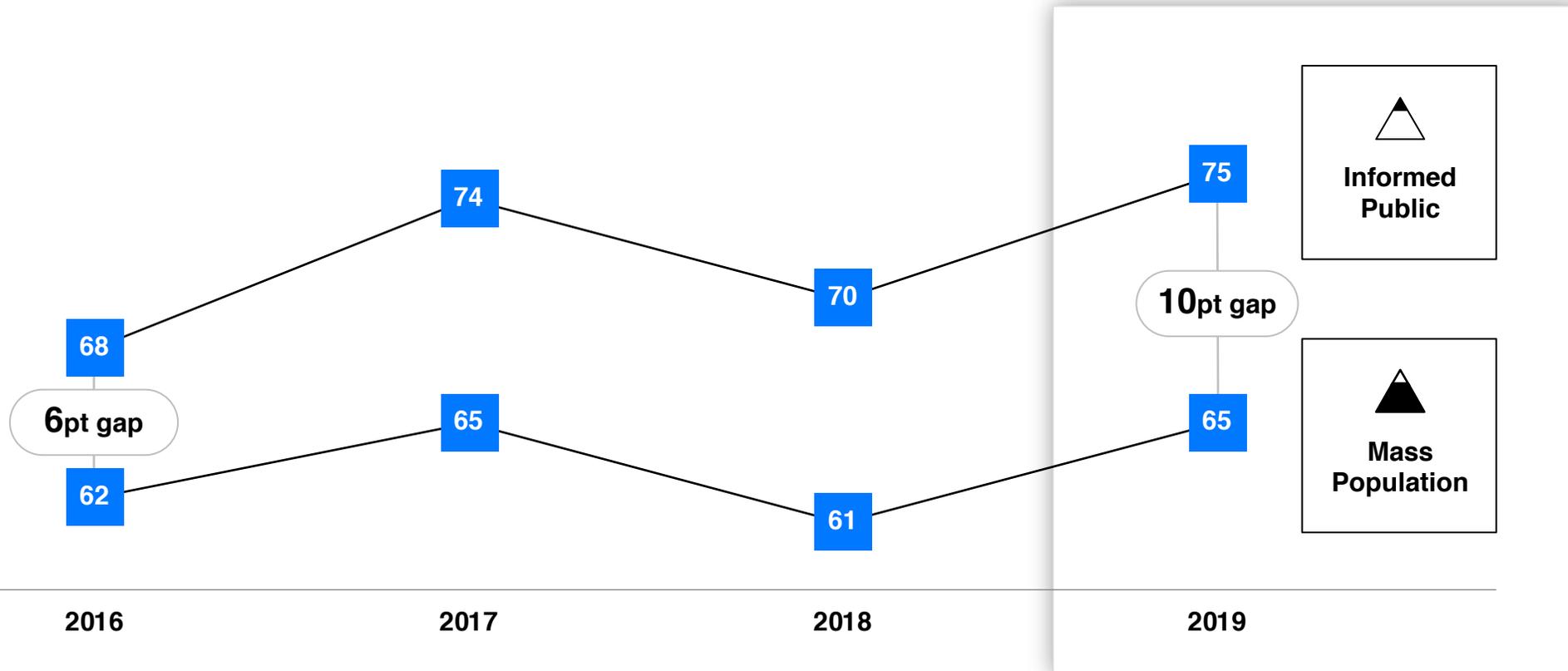


2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

HEALTHCARE TRUST INEQUALITY REACHES RECORD HIGH

Percent trust in healthcare

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

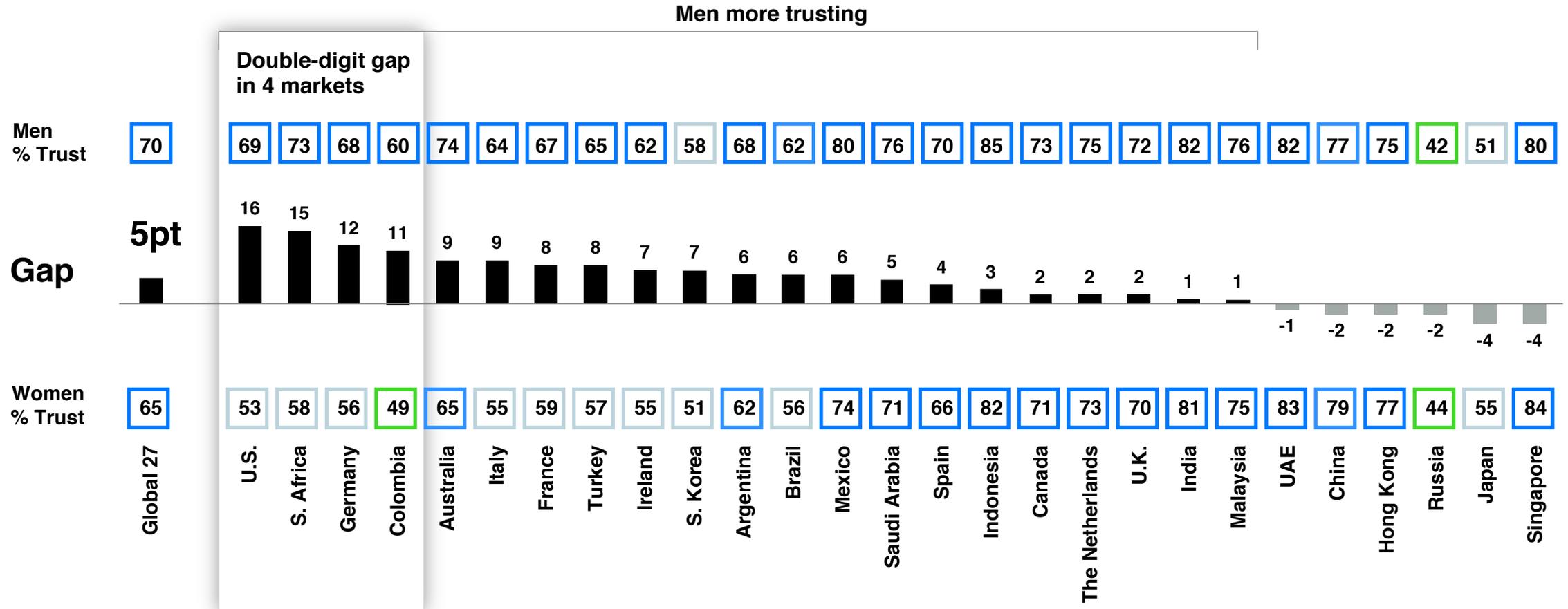


2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. Informed public and mass population, 26-market average.

WOMEN TRUST HEALTHCARE LESS THAN MEN; LARGEST GAP IN THE U.S.

Trust gap, comparing the difference between men's and women's trust in health

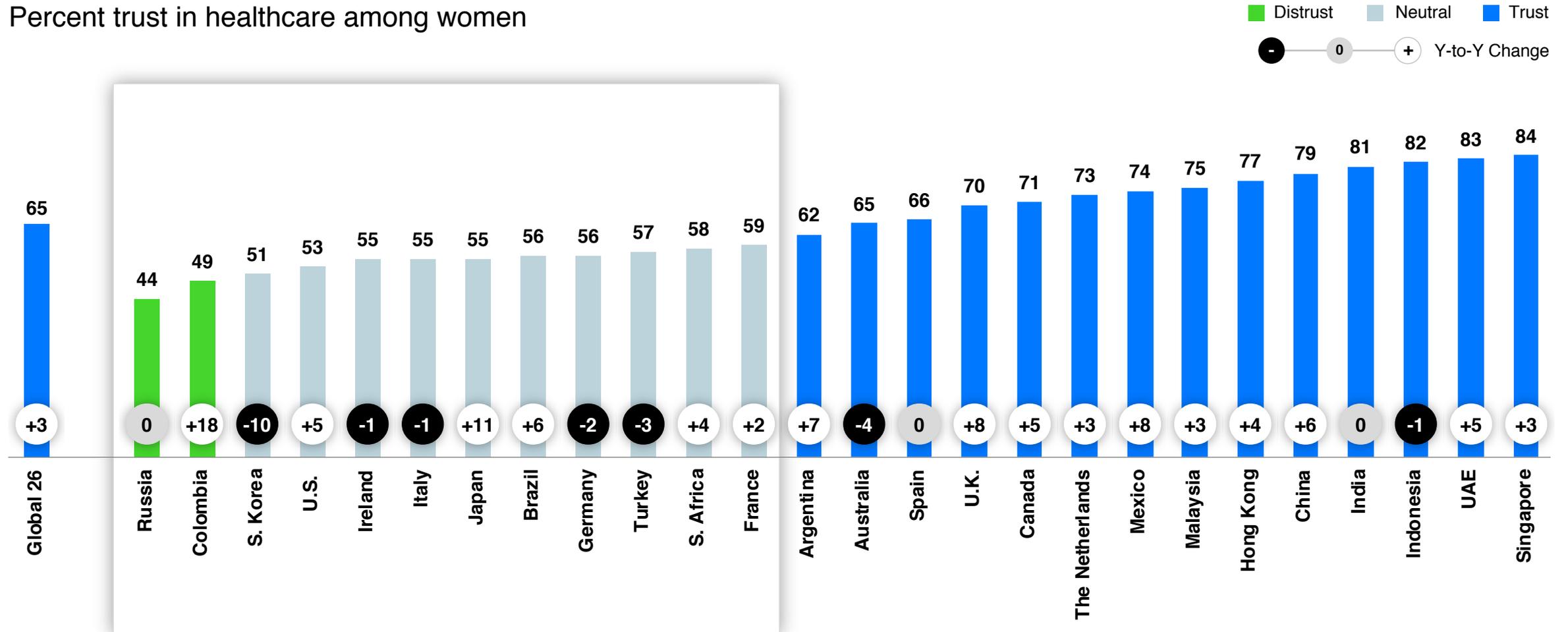
■ Distrust
 ■ Neutral
 ■ Trust



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". 9-point scale; top 4 box, trust. General population, 27-market average, by gender.

WOMEN DO NOT TRUST HEALTHCARE IN 12 OF 26 MARKETS

Percent trust in healthcare among women



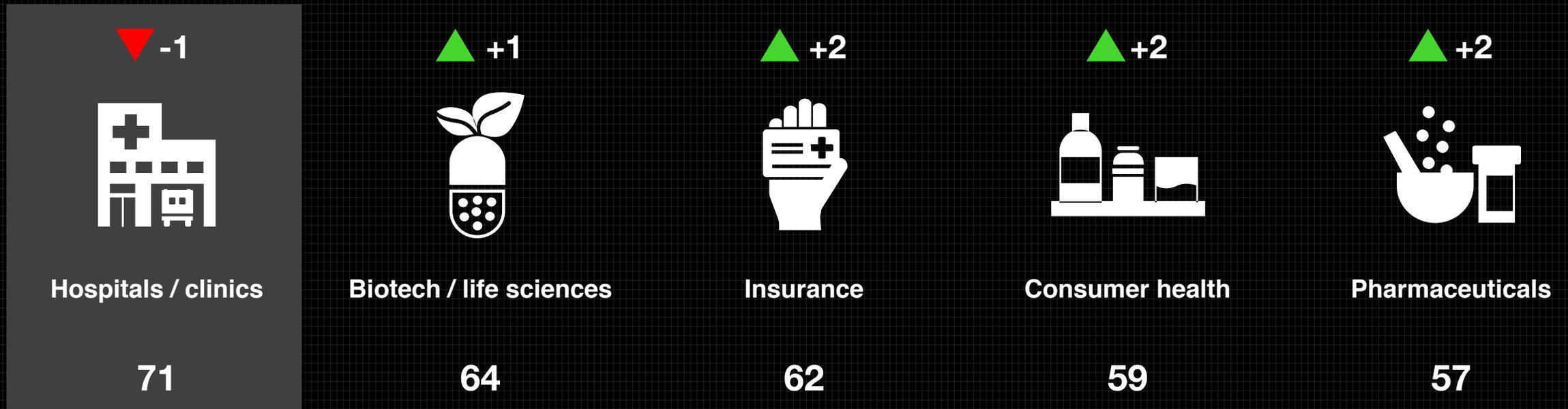
2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average, among women.



The State of Trust in Healthcare Subsectors

TRUST INCREASES IN ALL HEALTHCARE SUB-SECTORS EXCEPT HOSPITALS

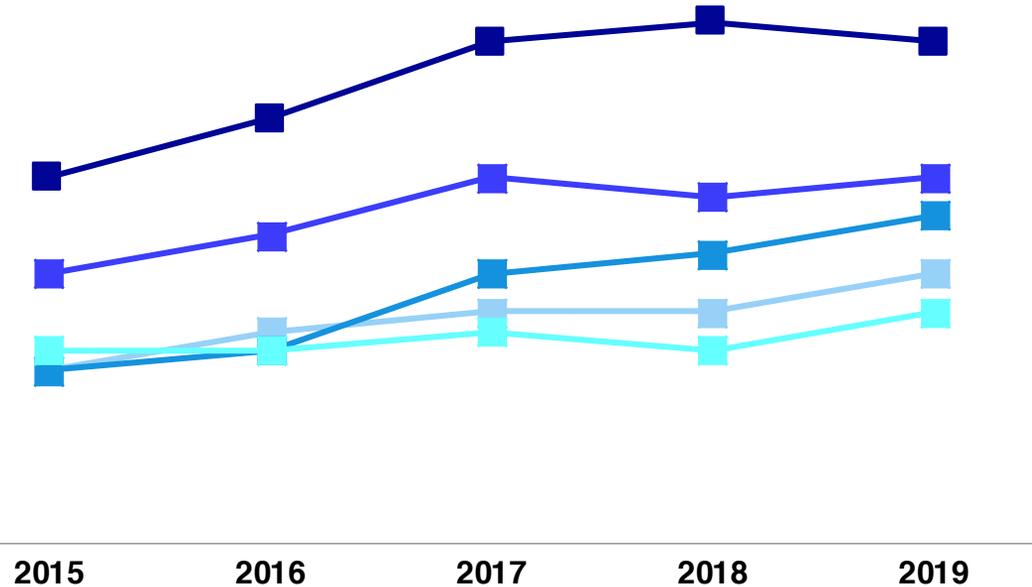
Percentage point change in trust from 2018 to 2019, and percent trust in each sub-sector



2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN HEALTH SUB-SECTORS OVER TIME

Percent trust in the health sub-sectors, 2015 to 2019

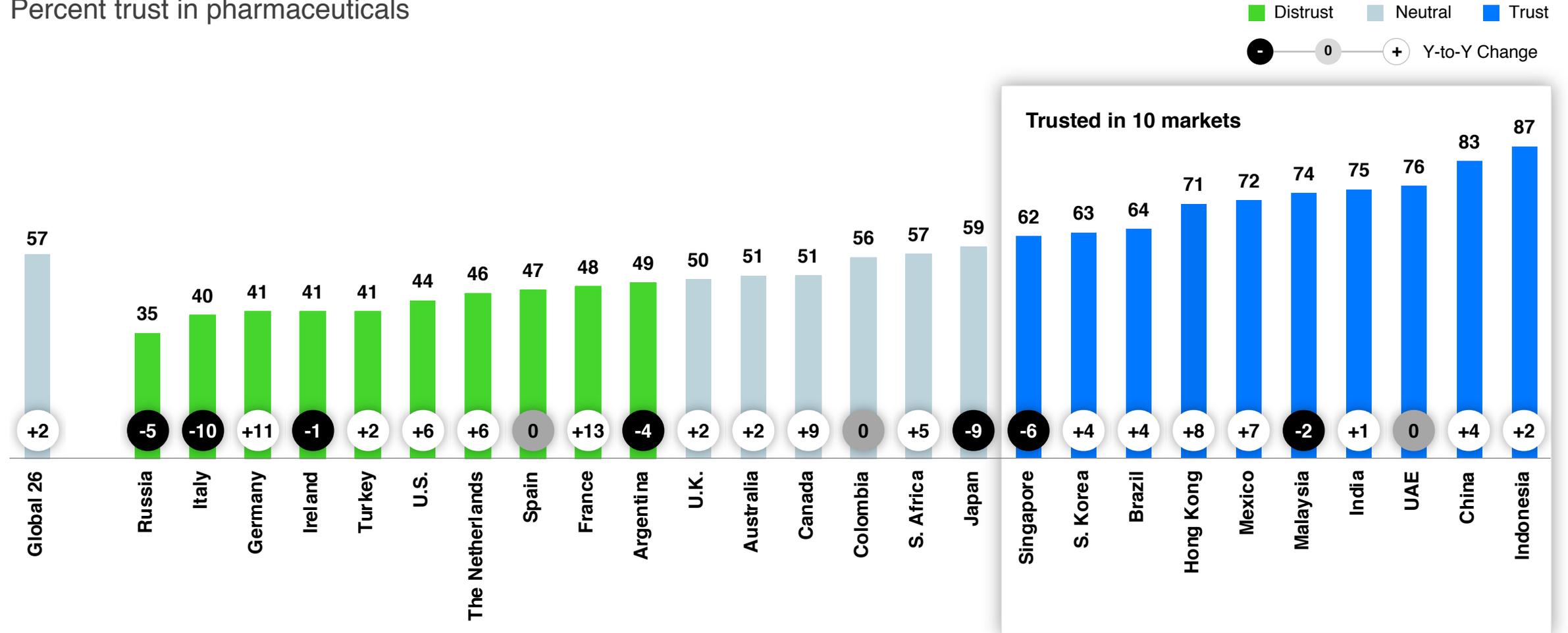


Industry	2015	2016	2017	2018	2019
■ Hospitals, Clinics	64	67	71	72	71
■ Biotech	59	61	64	63	64
■ Health insurance	54	55	59	60	62
■ Consumer health	54	56	57	57	59
■ Pharmaceutical	55	55	56	55	57

2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN PHARMACEUTICALS INCREASES IN 16 OF 26 MARKETS

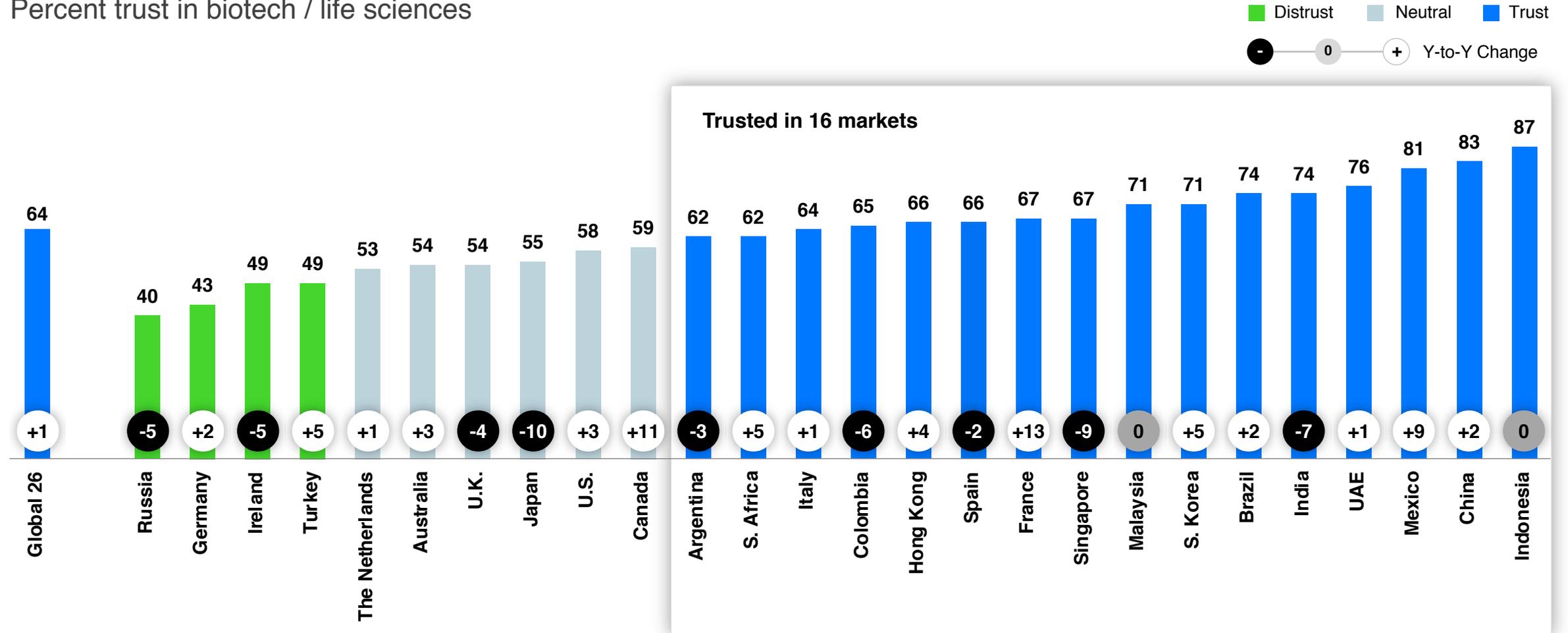
Percent trust in pharmaceuticals



2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN BIOTECH / LIFE SCIENCES INCREASES IN 15 OF 26 MARKETS

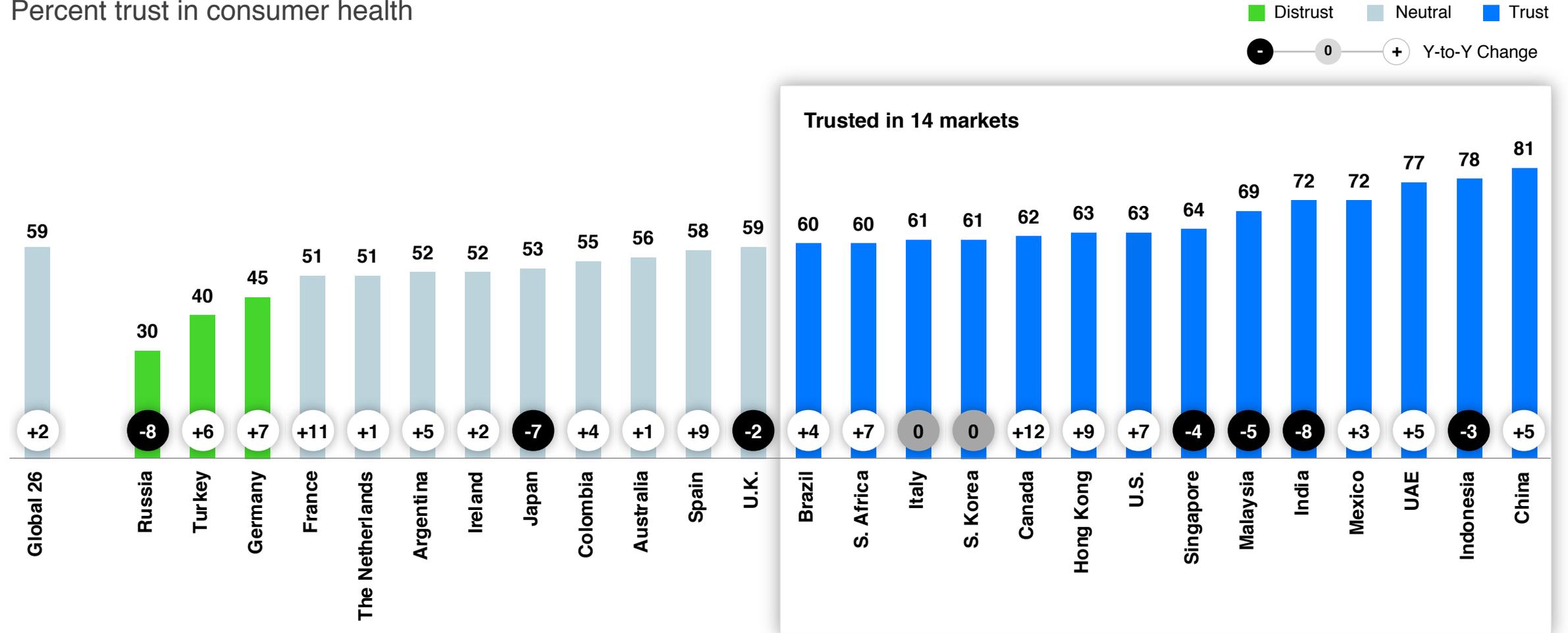
Percent trust in biotech / life sciences



2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN CONSUMER HEALTH INCREASES IN 17 OF 26 MARKETS

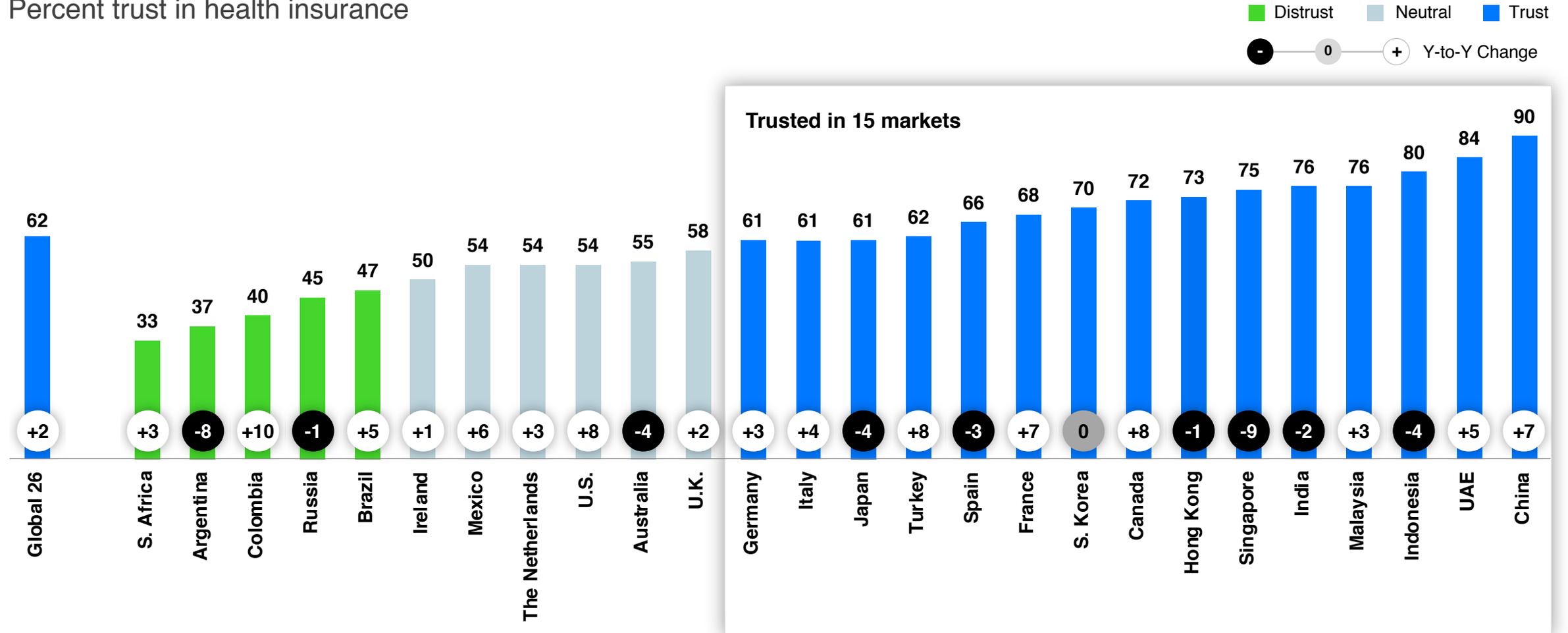
Percent trust in consumer health



2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN HEALTH INSURANCE INCREASES IN 16 OF 26 MARKETS

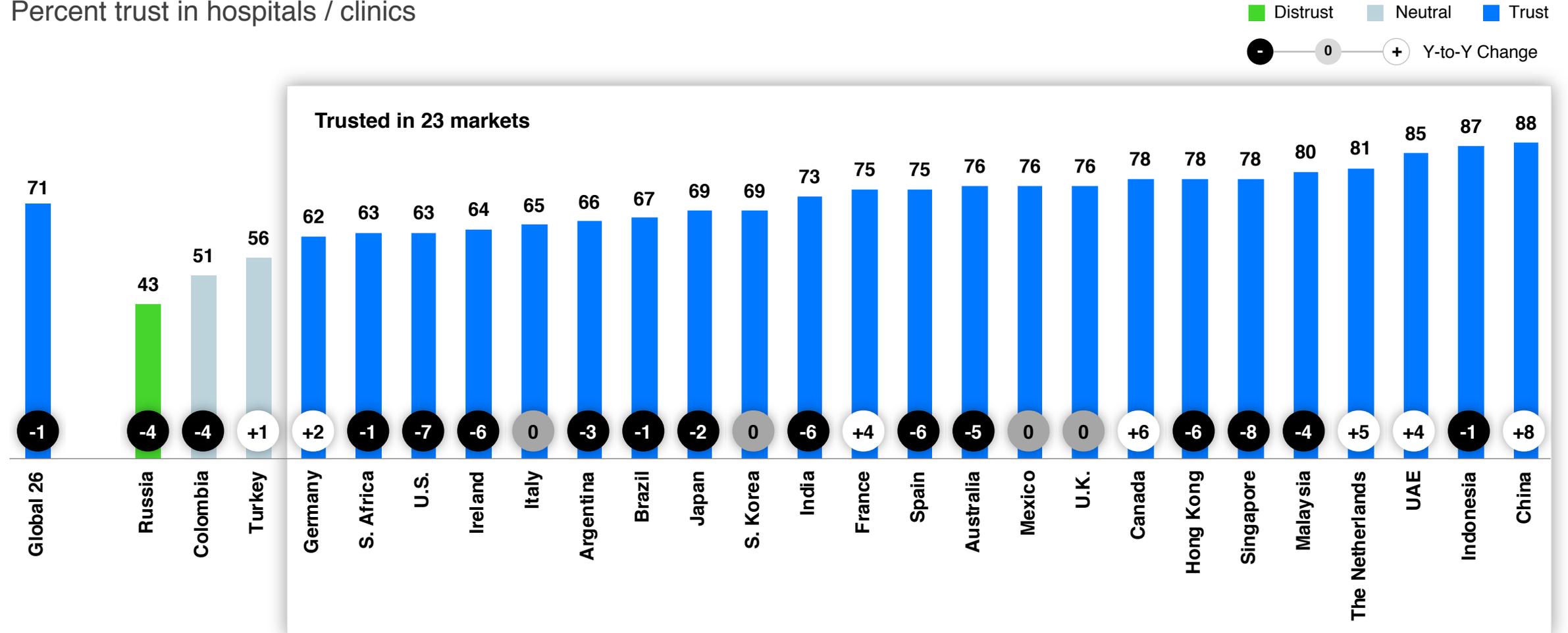
Percent trust in health insurance



2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

TRUST IN HOSPITALS / CLINICS DECREASES IN 15 OF 26 MARKETS

Percent trust in hospitals / clinics



2019 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. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

Implications for Healthcare Companies

- 1. Trust is fragile**
- 2. A rebound is not a strategy**
- 3. Bridge the gap with women**
- 4. Take sustained, proactive action to earn trust**

A black and white photograph of a woman in a meeting room, looking thoughtfully to the right. She is seated at a table with papers and a pen holder. The background shows other people and a window. Overlaid on the image are several blue, wavy, parallel lines that flow from the bottom left towards the top right, creating a sense of movement and connectivity.

Partner With Employees

LOOKING FOR LEADERSHIP FROM MY EMPLOYER

71%

of employees agree
**It's critically important for my CEO
to respond to challenging times**

- Industry issues
- Political events
- National crisis
- Employee-driven issues

2019 Edelman Trust Barometer. CEO_DIR. On which of the following occasions do you believe it is critically important to hear directly from the CEO or head of the organization you work for? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average.

Data shown is a net of “when there is major news or an event that affects our industry or sector,” “when there is a major social or political event that affects our country,” “when there is a crisis in the country,” and “when employees demand that the CEO publicly take a stand on an important issue”.

EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

Percent who agree

I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**

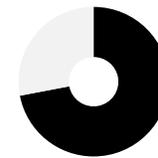
All employees **58%**

Multinational employees **63%**

Health employees **56%**

Employees see business as trustworthy source on:

Global



72%
The Global Economy

Health employees



69%
The Global Economy



58%
Technology



53%
Technology

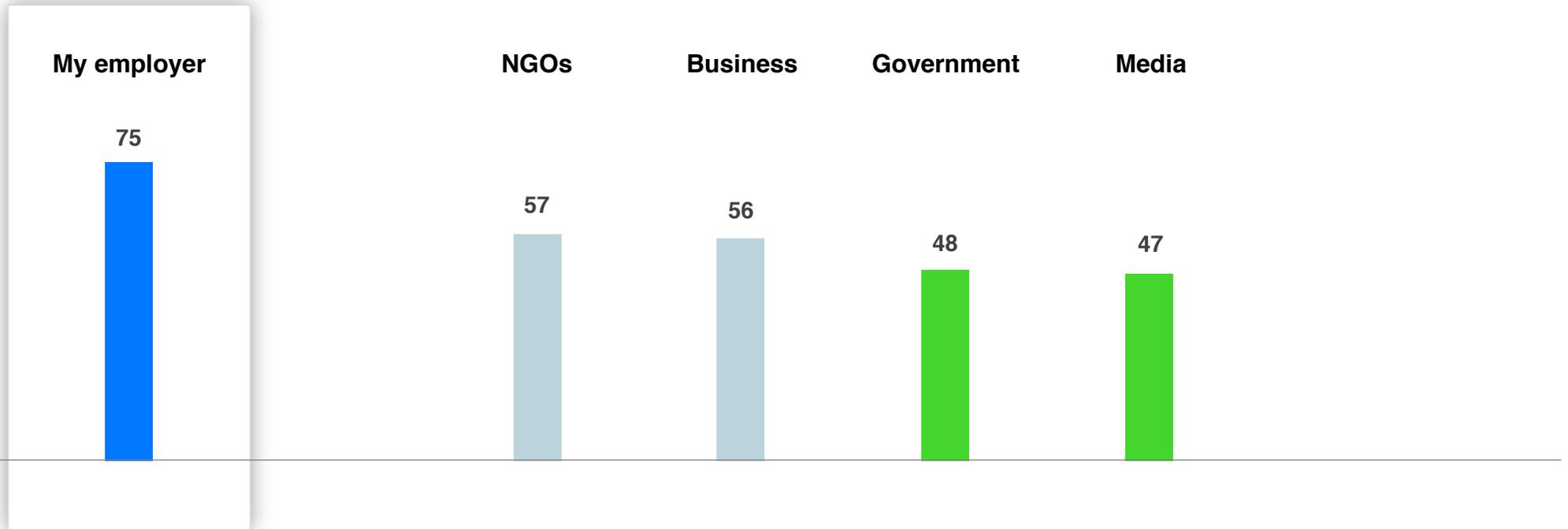
2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, multinational employees and health employees (Q420/9), 27-market average. BUS_SRC. Below is a list of topics and social issues. Please indicate about which of the following you believe business in general to be a trustworthy information source. Question asked of half of the sample. General population, 27-market average, among those who are a health employee, but do not run their own business (Q420/9 AND Q43/1 AND NOT Q28/7).

“The Economy” is a net of BUS_SRC/3,7,8,9,10; “Technology” is a net of BUS_SRC/2,5,6,11.

MY EMPLOYER MOST-TRUSTED RELATIONSHIP

Percent trust

■ Distrust ■ Neutral ■ Trust

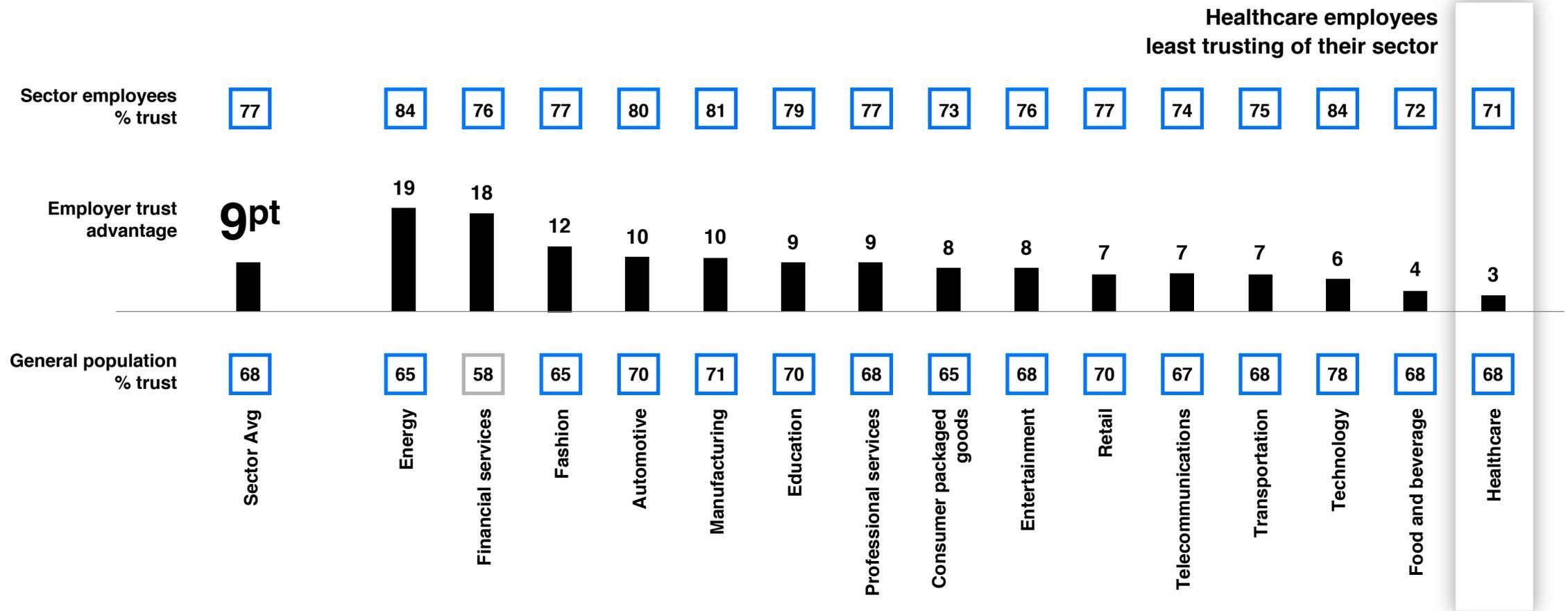


2019 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. “Your employer” asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population, 27-market average.

HEALTHCARE MISSING AN EMPLOYEE TRUST ADVANTAGE

Difference between sector trust among those employed in the sector and sector trust among the general population

■ Distrust
 ■ Neutral
 ■ Trust



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries asked of half of the sample. General population, 27-market average. Sector employee data is among those employed in each sector, but not self employed (Q420/1-18 AND Q43/1 AND NOT Q28/7).

HEALTH EMPLOYEES EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

Percent of employees who expect each from a prospective employer

Strong expectation
You would have to **pay me a lot more** to work for an organization that does not offer this

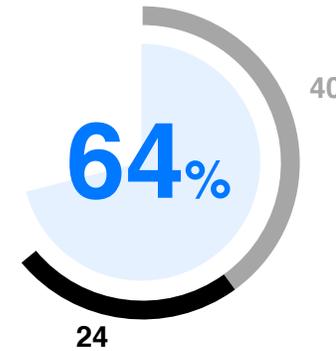
Deal breaker
I would **never** work for an organization that does not offer this

2019 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? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and healthcare employees (Q420/9), 27-market average. Buckets are the sum of the average of codes 1 & 2 for the items that make up each dimension. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.

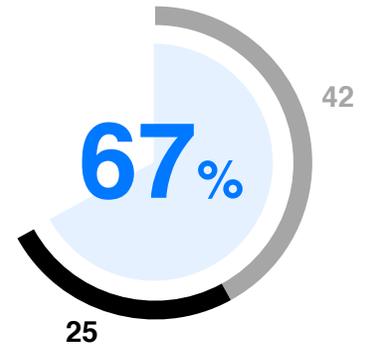
Shared Action

My employer has a greater purpose, and my job has a meaningful societal impact

Healthcare

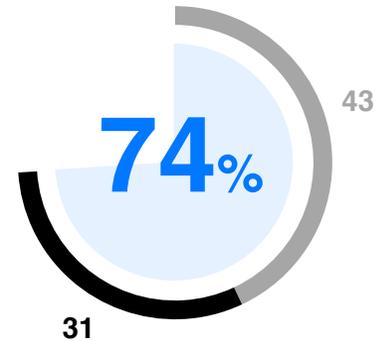
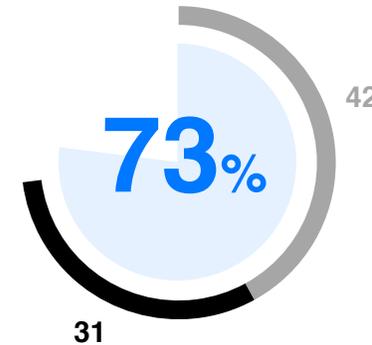


All sectors



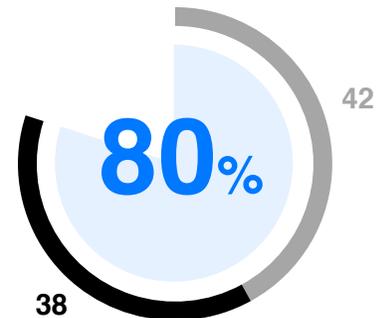
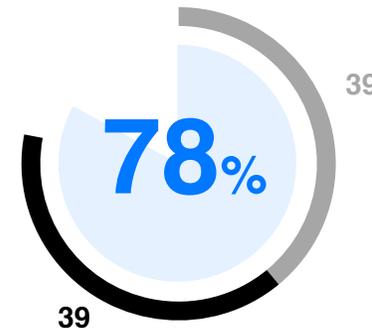
Personal Empowerment

I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



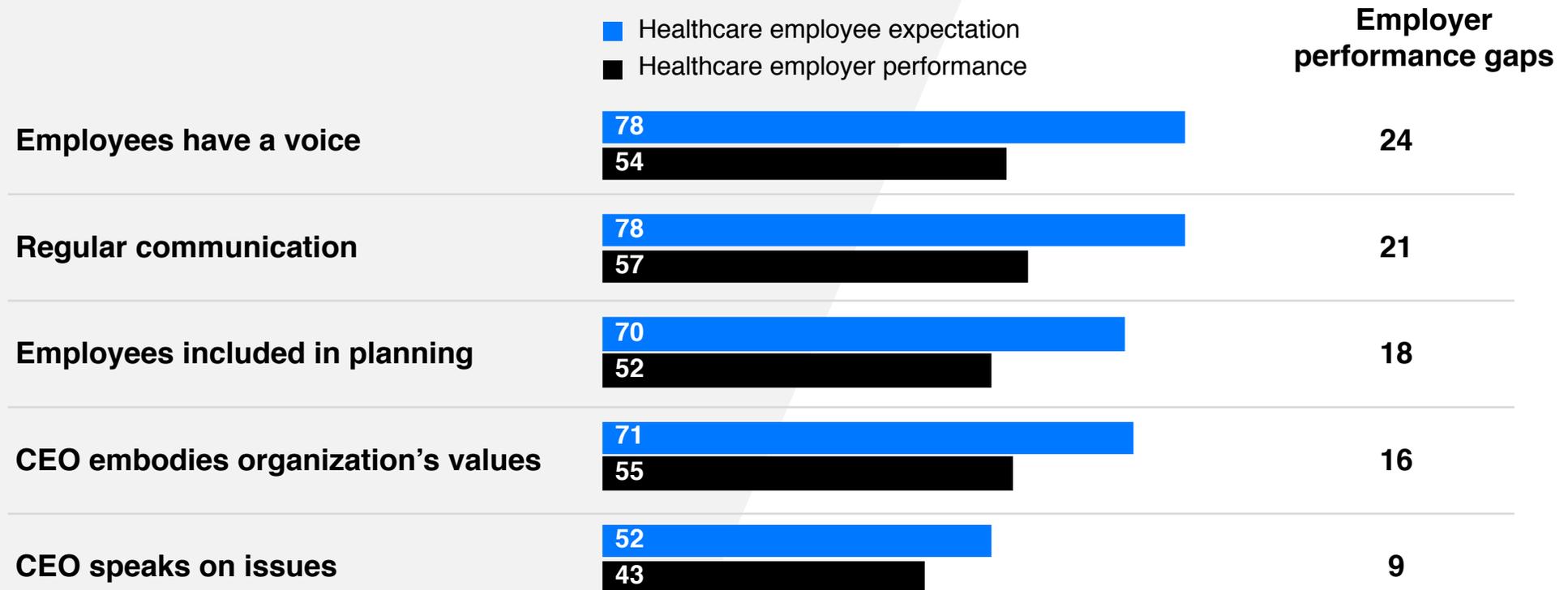
Job Opportunity

My employer offers wage growth, training, career growth and work which I find interesting & fulfilling



HEALTHCARE EMPLOYERS LAG IN EMPLOYEE EMPOWERMENT AND CEO LEADERSHIP

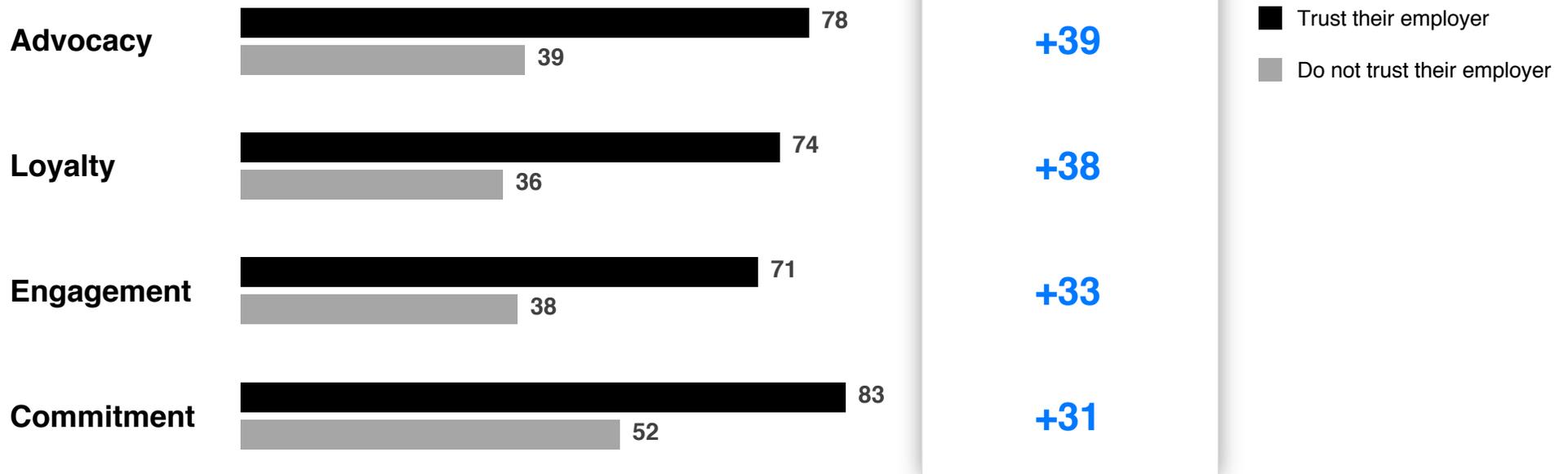
Percent of employees who expect each from a prospective employer, and percent who say their current employer is meeting that expectation, showing the five in which the healthcare sector lags other sectors the most



2019 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; top 2 box, expectation. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and healthcare employees (Q420/9), 27-market average. EMP_VAL. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and healthcare employees (Q420/9), 27-market average. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.

TRUST CEMENTS THE EMPLOYER-EMPLOYEE PARTNERSHIP

Percent of employees who engage in these types of behaviors on behalf of their employer



2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99). 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 using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, 27-market average. Advocacy is an average of (EMP_ENG/3-5); Loyalty is an average of (EMP_ENG/1-2); Engagement is an average of (EMP_ENG/10-15); Commitment is an average of (EMP_ENG/6-9). See the tech appendix for a complete list of the items that went into each employee KPI dimension.

INVESTING IN EMPLOYEE TRUST IS INVESTING IN YOUR BOTTOM LINE

How a company treats its employees is one of the best indicators of its level of trustworthiness

78%

Percent who agree that “a good reputation may get me to try a product, but unless I come to trust the company behind the product, I will soon stop buying it”

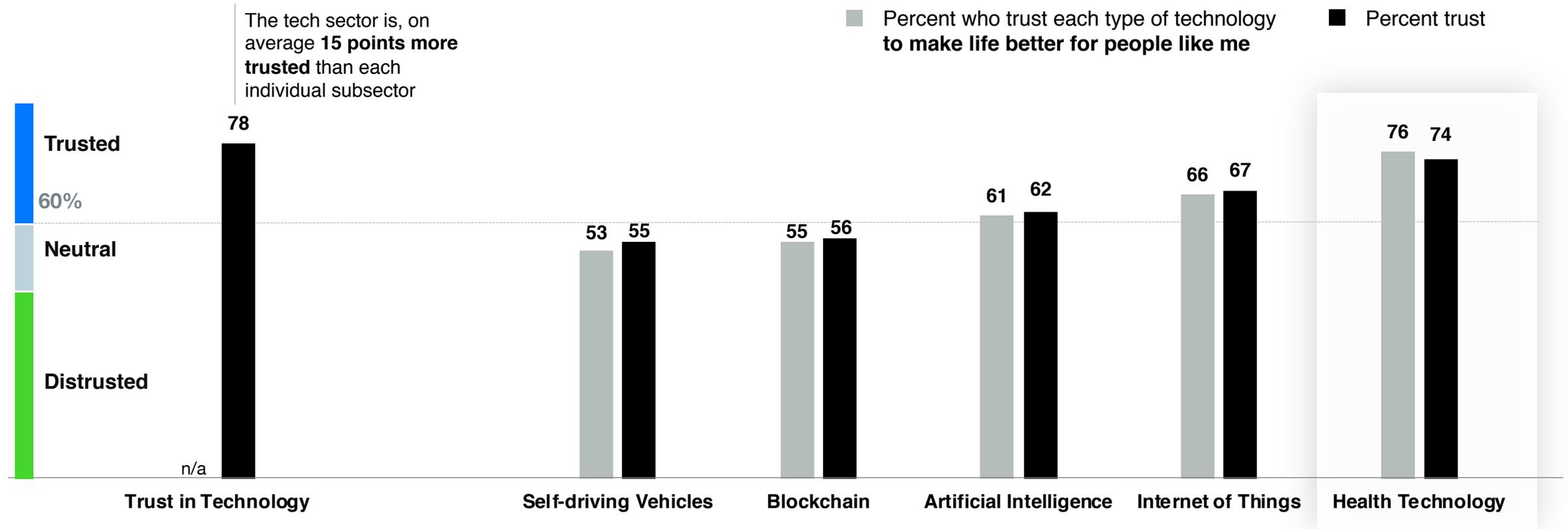
67%

A hand is holding a tablet computer. In the background, a keyboard is visible. Overlaid on the image is a blue wireframe graphic consisting of many thin, curved lines that form a shape resembling a hand or a stylized letter 'H'. The text is overlaid on the left side of the image.

If You Have a Health Tech Story – Tell It

I TRUST TECH ONLY AS MUCH AS IT BENEFITS ME

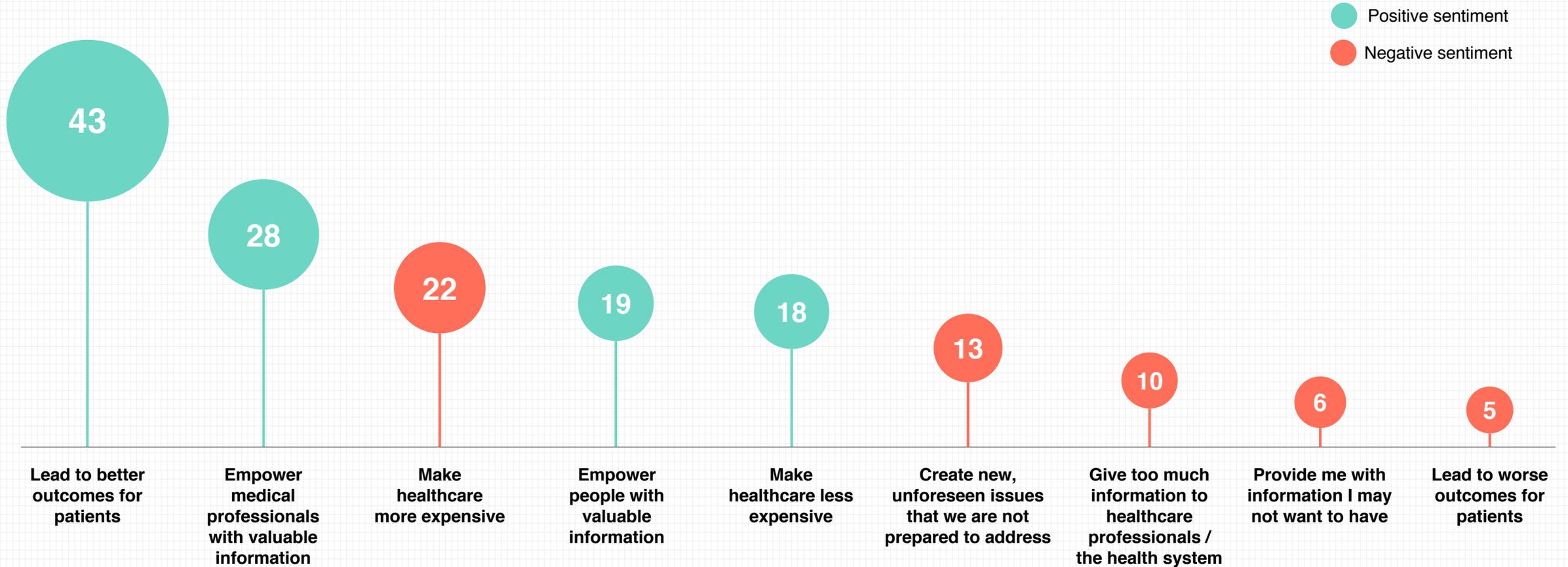
Percent who trust technologies to make life better for people like them, and percent who trust each subsector



2019 Edelman Trust Barometer. DRV_TEC_BET. Please indicate how much you trust each of the following types of technology to make life better for people like you. Again, please use the same 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-market average. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. TRU_SUB_TEC. Now thinking about specific sectors within the technology industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

HEALTH TECH SENTIMENT LARGELY POSITIVE

How is the application of technology to healthcare most likely to impact healthcare in the next 5 years?



ADDRESS THE ACHILLES HEEL BY REASSURING ON PERSONAL DATA PROTECTION

Top 3 business practices that would make respondents comfortable sharing their health data with healthcare companies

- 1 The company would place the data in the most secure data protection system available
- 2 The privacy of my data was guaranteed by the government
- 3 They could guarantee that no one could ever link my data back to me





Transparency Above All

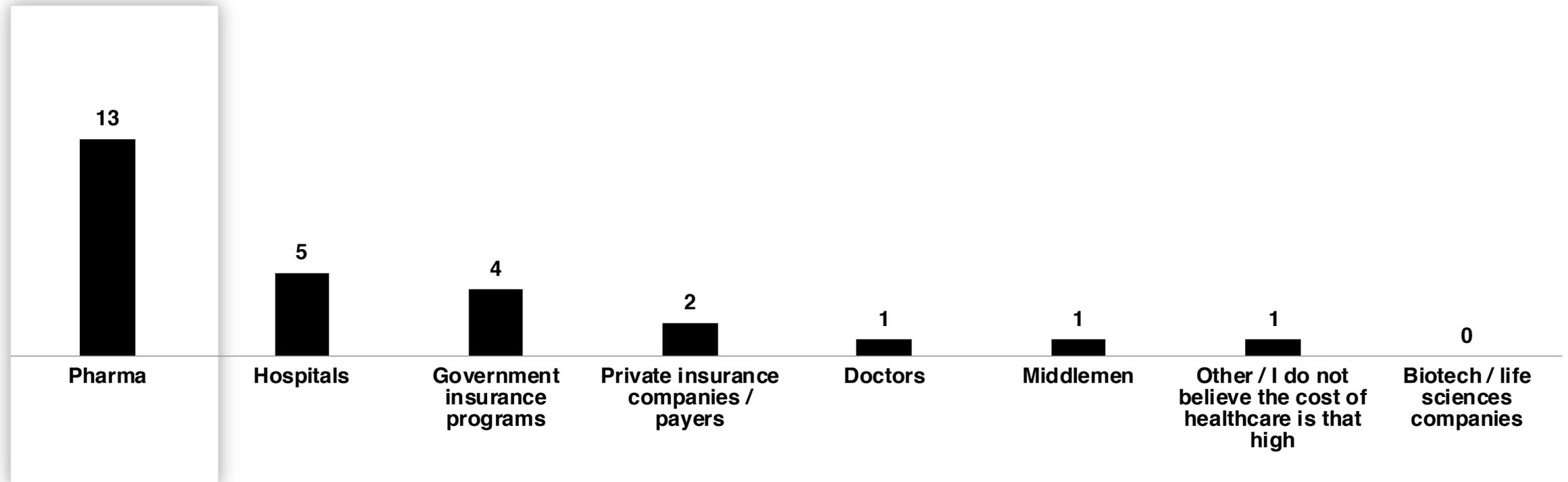
TRANSPARENCY RANKS HIGHEST FOR EARNING AND KEEPING TRUST

Top 3 actions for a healthcare company to earn and keep trust

- 1 Be transparent about the cost of their products / services**
- 2 Provide balanced information about product side effects as well as benefits**
- 3 Provide information, tools and support to help me manage my disease**

ALL HEALTH COMPANIES MUST ADDRESS COST; PHARMA TAKES BULK OF BLAME

Number of markets that selected each as being *most* to blame for the high cost of healthcare?

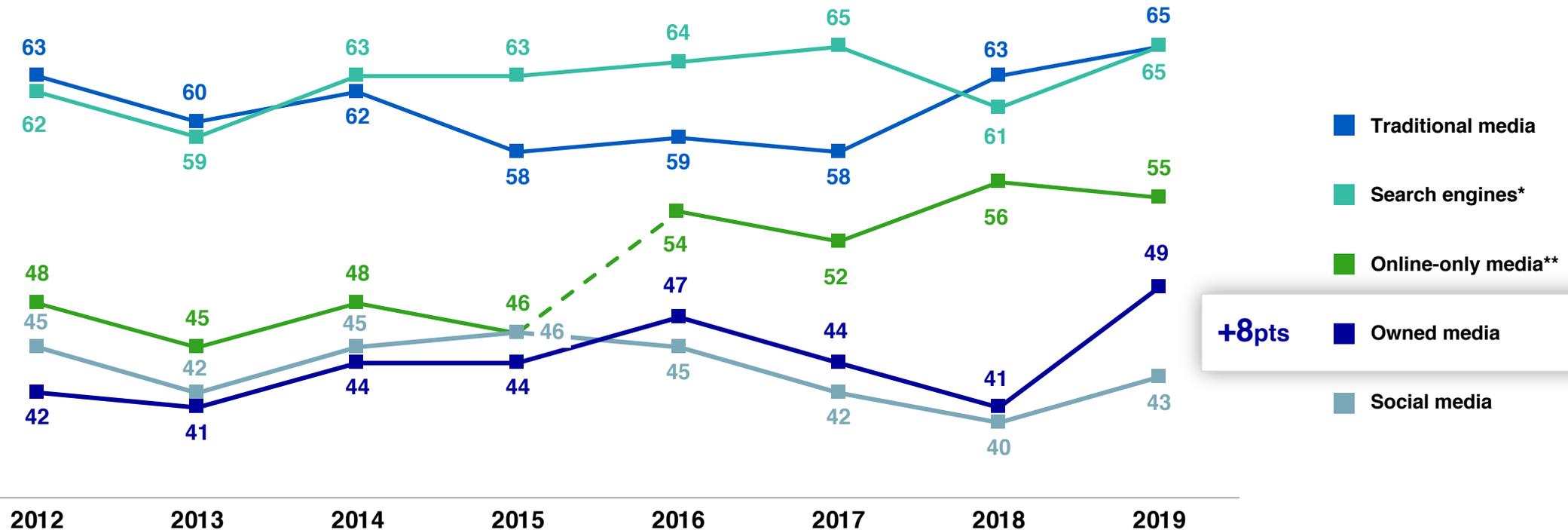




Activate a Cross-Channel Plan

TRUST IN OWNED MEDIA SURGES

Percent trust in each source for general news and information



2019 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? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 23-market average.

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

**From 2012-2015, “Hybrid Media” was included as a media type. In 2016, this was changed to “Online-Only media.”

MORE SEE HEALTH COMPANY INFO AS CREDIBLE THAN TRUST MEDIA ACCURACY

Trust in Media

57%

Trust the media to report accurate information about healthcare

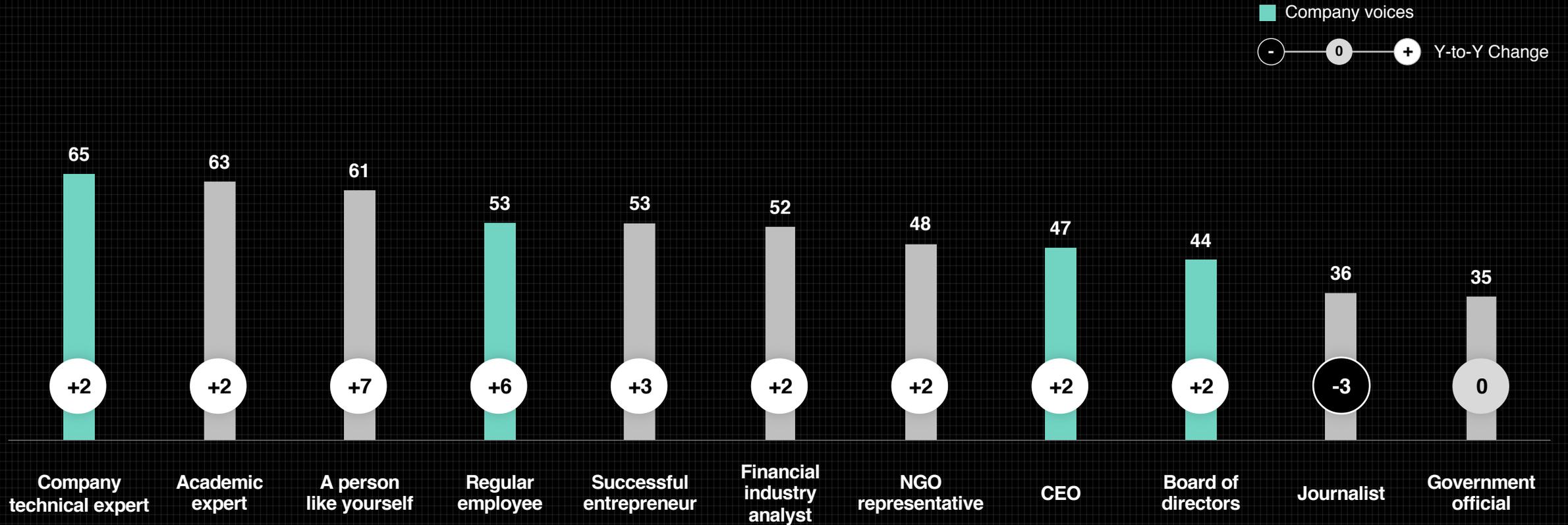
Credibility of Health Companies

68%

Credibility of information provided by health companies about medical conditions and their treatments

ACTIVATE EMPLOYEE VOICES

Percent who rate each source as very/extremely credible



2019 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all. 4-point scale; top 2 box, credible. Question asked of half of the sample. General population, 26-market average.

Building Trust for Healthcare Companies

1

**Partner with
employees**

2

**If you have a health
tech story – tell it**

3

**Transparency
above all**

4

**Activate a
cross-channel
plan**