







2022年《爱德曼全球信任度调查报告》

调查方法

第22次年度调查

调查时间:2021年11月1日-24日

28 36,000+ 1,150+

位受访者

个国家

位受访者/国家

全球均值因每年受调查国家数量而异:

全球27国不包括尼日利亚*

全球22国不包括哥伦比亚、肯尼亚、尼日利亚、沙特阿拉伯、南非和泰国

全球24国 未调查中国、俄罗斯、泰国

出于问题敏感性,无法在上述市场收集相关数据。

其他全球均值详见技术附录

*为避免歪曲全球性调查结果,尼日利亚不包括在任何全球均值中,因为其线上受访者无法代表真实群体

澳大利亚

各国调查数据误差范围:普通受访者+/- 2.9% (n=1,150);半数受访者 样本量+/- 4.1% (受访者人数=575)。 西拔牙

阿联酋

英国

2022 EDELMAN TRUST BAROMETER

Methodology

27-market global data margin of error: General population +/- 0.6% (n=31,050); half-sample global general online population +/- 0.8%

Country-specific data margin of error: General population +/- 2.9% (n=1,150); half-sample +/- 4.1% (n=575).

Annual online survey in its 22nd year

Fieldwork conducted: Nov 1 - Nov 24, 2021

28

36,000+

1,150+

countries

respondents

respondents/country

GLOBAL AVERAGES vary based on the number of countries surveyed each year:

GLOBAL 27 does not include Nigeria*

GLOBAL 22 does not include Colombia, Kenya, Nigeria, Saudi Arabia, S. Africa and Thailand

GLOBAL 24 Not asked in China, Russia, Thailand

the sensitive nature of the question prevented this data from being collected in these markets

Other global averages detailed in technical appendix

*To prevent skewing the global results, Nigeria is not included in any global averages because the online population is not representative of the true population

Canada Colombia France Germany Indonesia Malaysia Mexico Russia Saudi Arabia Singapore S. Africa

Argentina

Brazil

China

India

Italy

S. Korea

Thailand

UAE

U.S.

The Netherlands

二十二年信任度调查回顾

'01	'02	·03	'04	'05	'06	'07	'08	'09	'10	'11
NGO的 信任度上升	明星CEO的 信任度下降	口碑比广告更 具可信度	美国企业在欧 遭受信任危机	信任从 "权威"向 "同行"转变	"像我一样的 人"逐渐成为 可信的发言人	企业较政府及 媒体更具 信任度	有影响力的年 轻人对于企业 更为信任	企业需与政府合 作重获信任	信任成为企 业经营中不 可或缺的一 部分	权威人士 信任度上升
'12	'13	'14	['] 15	'16	·17	['] 18	['] 19	'20	·21	'22
政府 信任度降低	领导者 信任危机	企业 引导变革	信任对于创新 至关重要	信任失衡加剧	信任危机	真相之战	信任与就业	信任: 能力与道德规范	信息之"疫"	打破 失信循环

22 YEARS OF TRUST

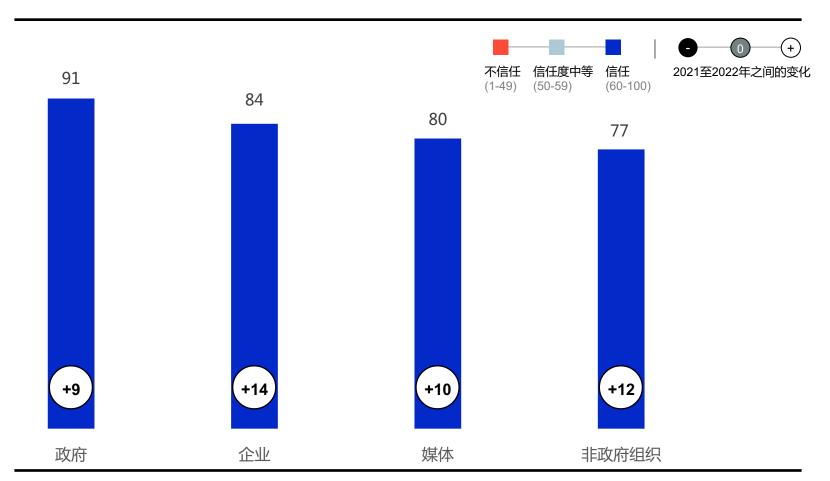
'01	'02	·03	'04	'05	'06	'07	'08	'09	'10	'11
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummets	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
['] 12	'13	'14	'1 5	'16	'17	'18	'19	'20	'21	'22
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	Business Most Trusted	Breaking the Cycle of Distrust

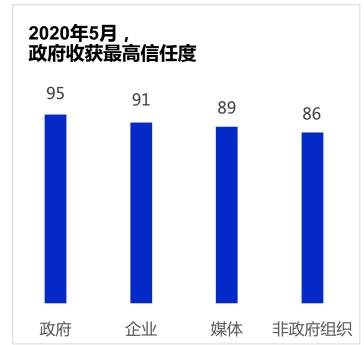




中国民众对四类机构的信任度均有增长

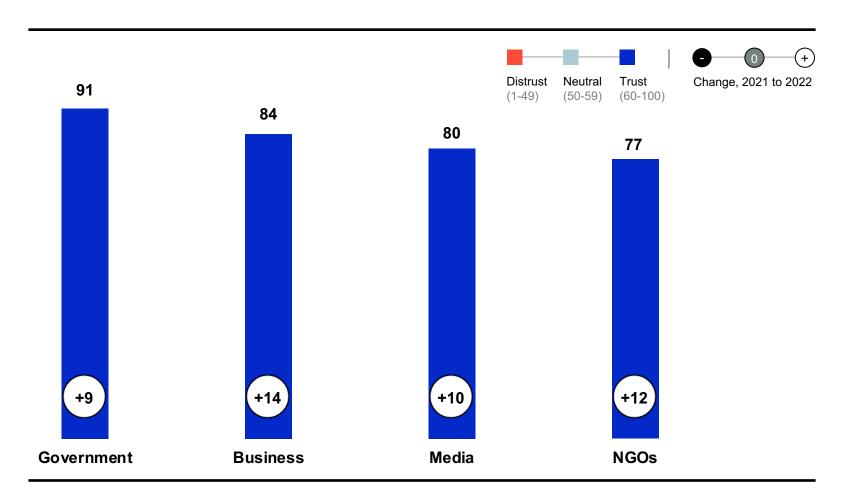
中国受访者的信任度占比

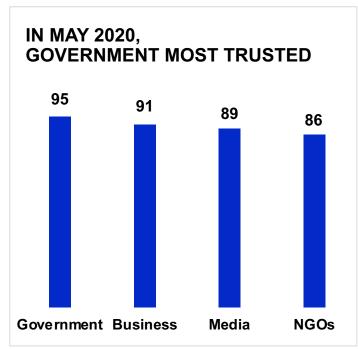




TRUST INCREASES ACROSS INSTITUTIONS

Percent trust, in China





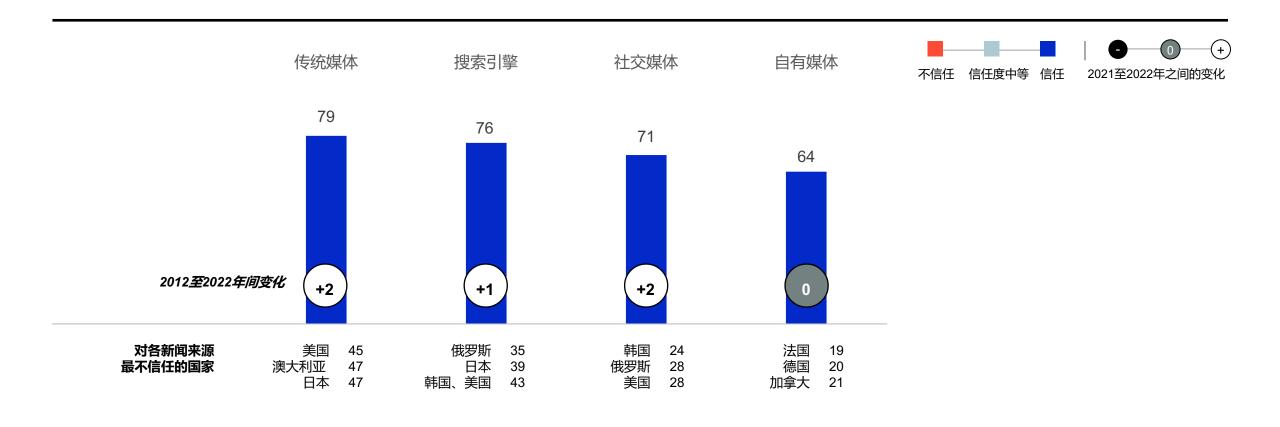
2022 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, China.





四大新闻来源均受信任

中国受访者的信任度占比

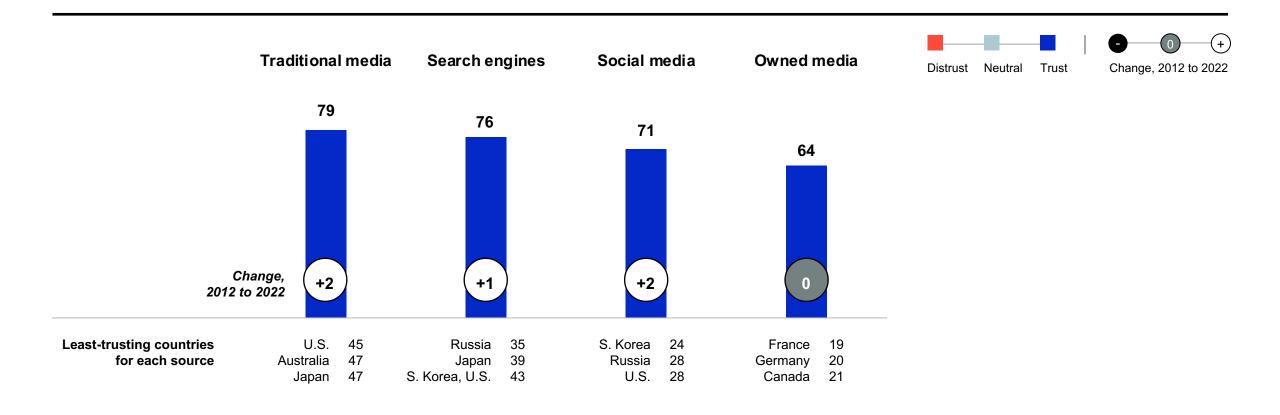


2022年《爱德曼全球信任度调查报告》COM_MCL.在寻找一般新闻和信息时,您对其各类来源的信任程度如何? 9分制:选前4项为信任。半样本法调查受访。数据来源于对中国普通受访者的调查。



ALL NEWS SOURCES TRUSTED IN CHINA

Percent trust, in China







企业和非政府组织有能力促进社会的积极变化

中国受访者的评分净值

	企业 净分数	非政府组织 ^{净分数}	
能力	60	55	高效的社会进步推动者 vs
HC/J			无效的社会进步推动者
			D 农
远见	44	46	具备我所相信的未来愿景 vs
			不具备我所相信的未来愿景
公平	46	46	平等公正地服务于每个人的利益 vs
Δ +			仅为某些群体的利益服务



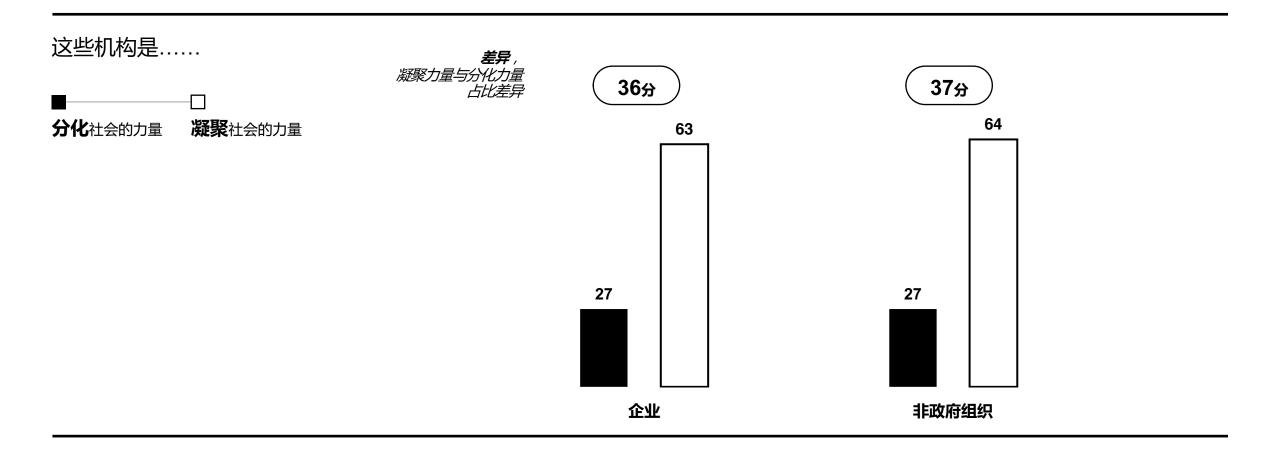
BUSINESS AND NGOS SEEN AS COMPETENT AND EFFECTIVE DRIVERS OF POSITIVE CHANGE

Net ethical scores in detail, in China

	Business Net score	NGOs Net score	
Effective	60pts	55	Highly effective agent of positive change
Lifective	OOpts	33	Completely ineffective agent of positive change
Visionary	44	46	Has vision for the future I believe in
			Does not have a vision for the future I believe in
Fair	46	46	Serves the interests of everyone equally and fairly
l'all	40		Serve the interests of only certain groups of people

企业和非政府组织有助于凝聚社会力量

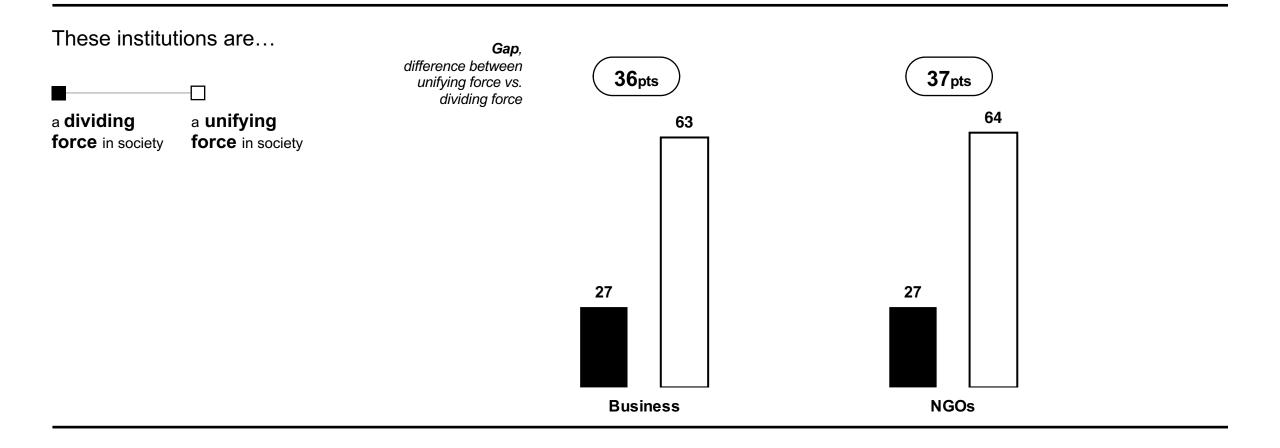
持两种观点的中国受访者占比





BUSINESS AND NGOS SEEN AS UNIFYING

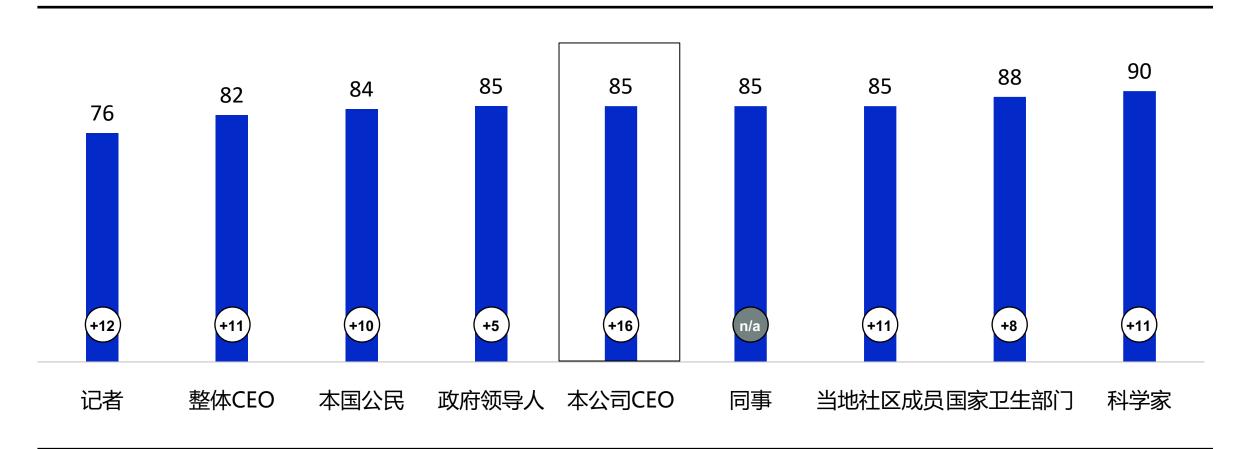
Percent who say, in China



科学家最受信任,对雇主的CEO信任度提升最快

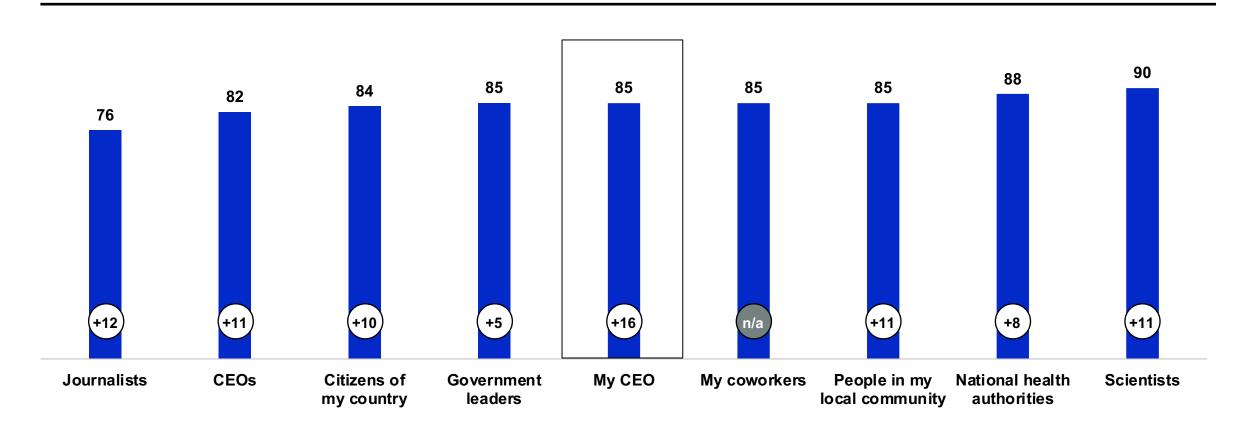
中国受访者的信任度占比

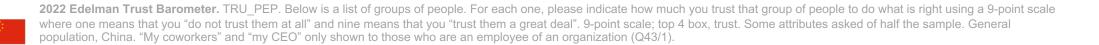




SCIENTISTS MOST TRUSTED; BIGGEST TRUST GAIN FOR MY EMPLOYER CEO

Percent trust, in China







Change, 2021 to 2022

Distrust

Neutral

Trust

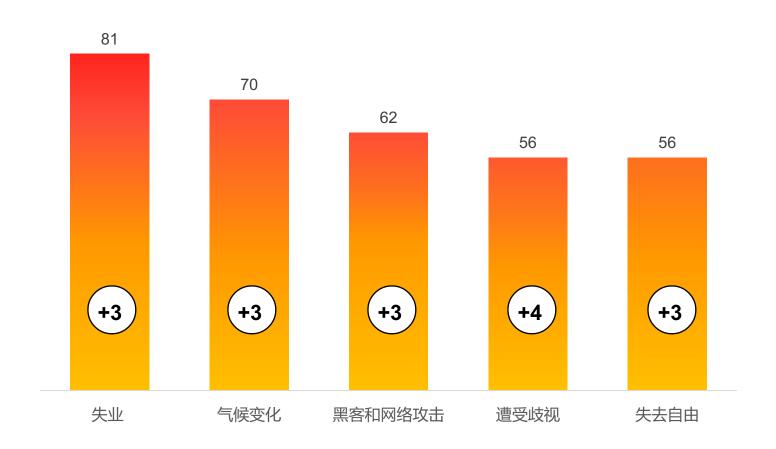




对社会问题的忧虑情绪 有所加剧

对不同社会问题表示担忧的中国受访者占比





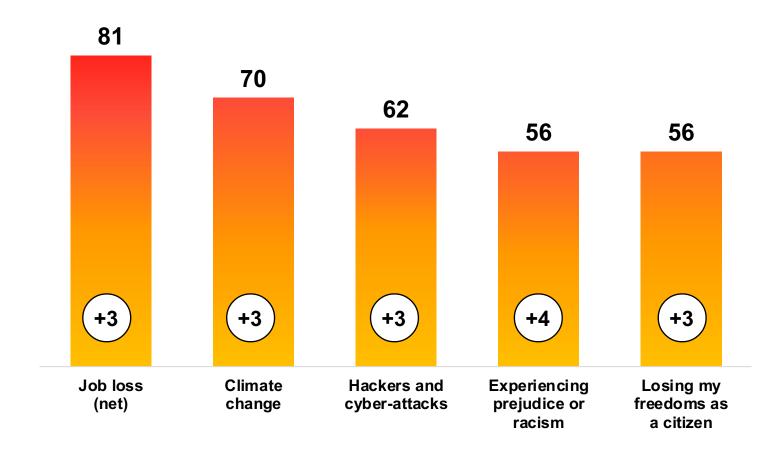
2022年《爱德曼全球信任度调查报告》POP_EMO.有些人忧心忡忡,有些人无忧无虑。我们关注您所担心的事情。具体而言,您对以下各项的担心程度如何?9分制:选前4分表示担心。非失业类属性向一半样本显示。数据来源于对中国普通受访者的调查。失业选项仅限企业职员(Q43/1)。失业选项是属性1-3、5以及22-24的净值。



SOCIETAL FEARS ON THE RISE

Percent who worry about each, in China





2022 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Non-job loss attributes shown to half of the sample. General population, China. Job loss asked of those who are an employee of an organization (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.

各利益相关方均希望企业具备价值观担当

认同以下说法的受访者占比

中国

90%

购买或推荐 价值观相合的产品 89%

选择就业 价值观相合的雇主 86%

投资 价值观相合的标的 全球7国

来源:2021年《爱德曼全球信任度调查报告》专

题报告:投资机构

88%

投资机构对ESG的关注度,与财务和运营状况同样重视

ALL STAKEHOLDERS HOLD BUSINESS ACCOUNTABLE

Percent who agree

In China

90%

Buy or advocate for brands based on their beliefs and values 89%

Choose a place to work based on their beliefs and values 86%

Invest
based on their
beliefs and values

Global 7

Source: 2021 Edelman Trust Barometer Special Report: Institutional Investors

88%

of **institutional investors** subject ESG to the same scrutiny as operational and financial considerations

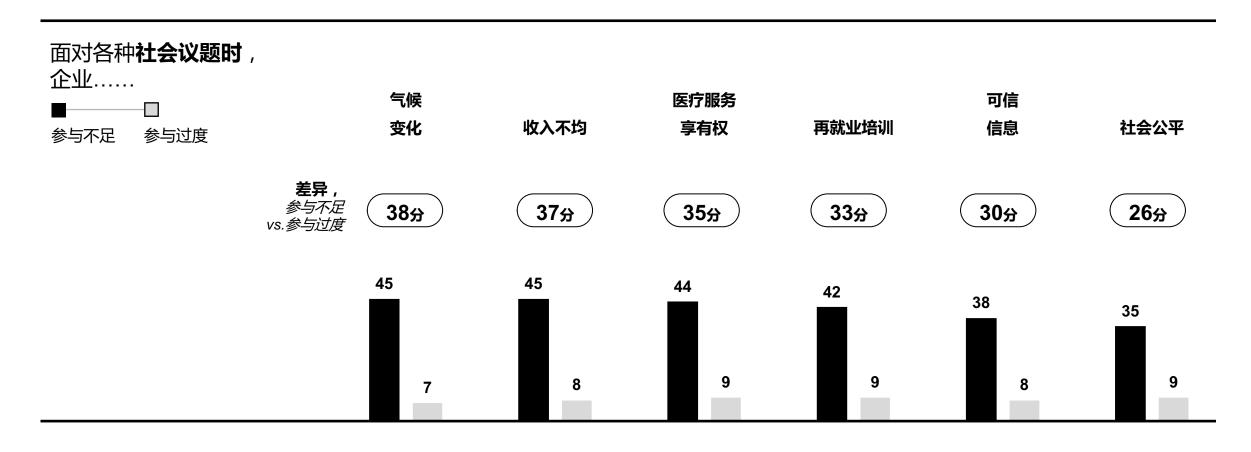
2022 Edelman Trust Barometer. Belief-driven consumer, employee, and investor segments. General population, China. Employee data is filtered to be among employees of an organization (Q43/1). Investor data is only among those who sell stocks, bonds, or mutual funds as a standalone or employer-sponsored investment (INVESTOR/1). See Technical Appendix for a full explanation of how belief-driven consumers, employees, and investors were measured.

2021 Edelman Trust Barometer Special Report: Institutional Investors. Q7. Please indicate the extent to which you agree or disagree with the following statements regarding shareholder activism. 4-point scale; top 2 box, agree. 7-mkt avg.



企业应当更积极参与社会议题

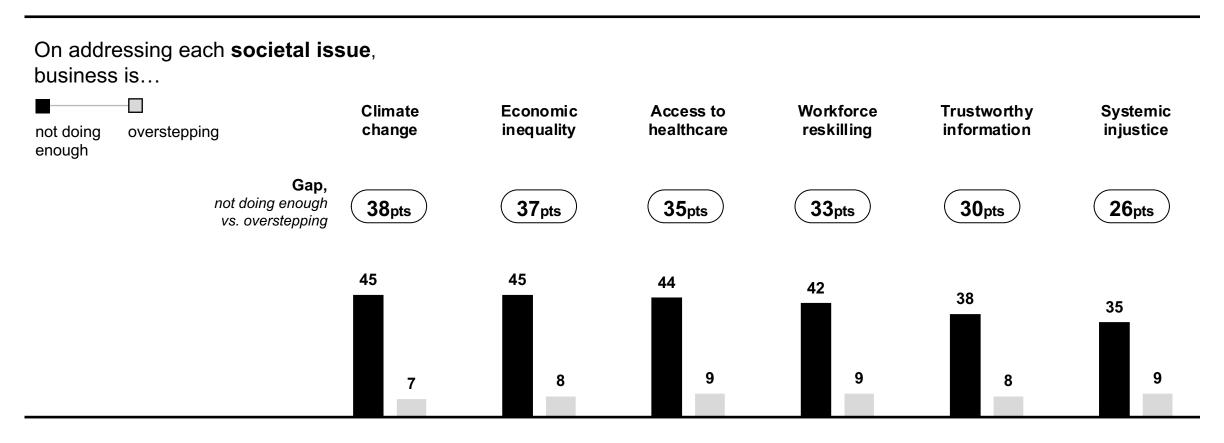
持两种观点的中国受访者占比





WANT MORE, NOT LESS, BUSINESS ENGAGEMENT ON SOCIETAL ISSUES

Percent who say, in China

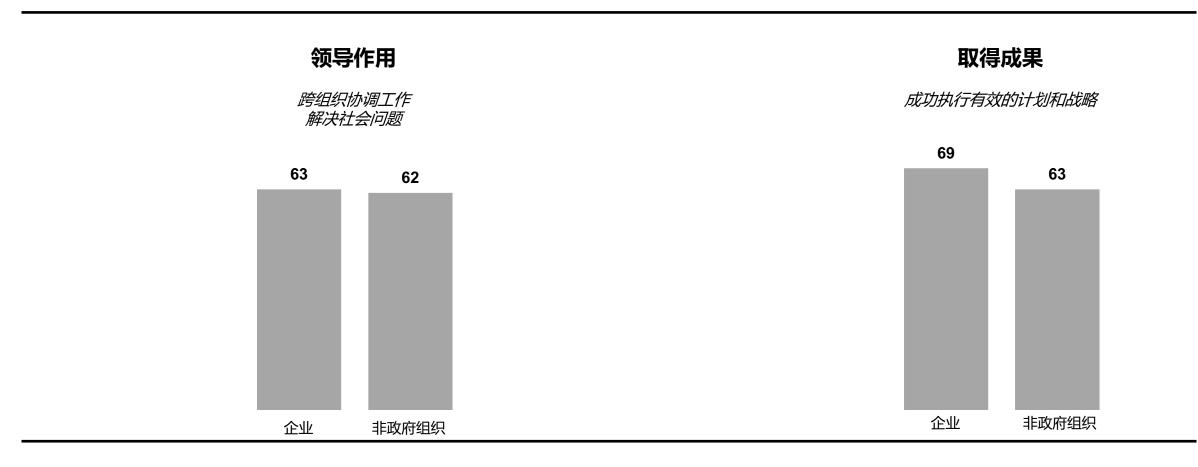






在社会议题上,企业和非政府组织可更有作为

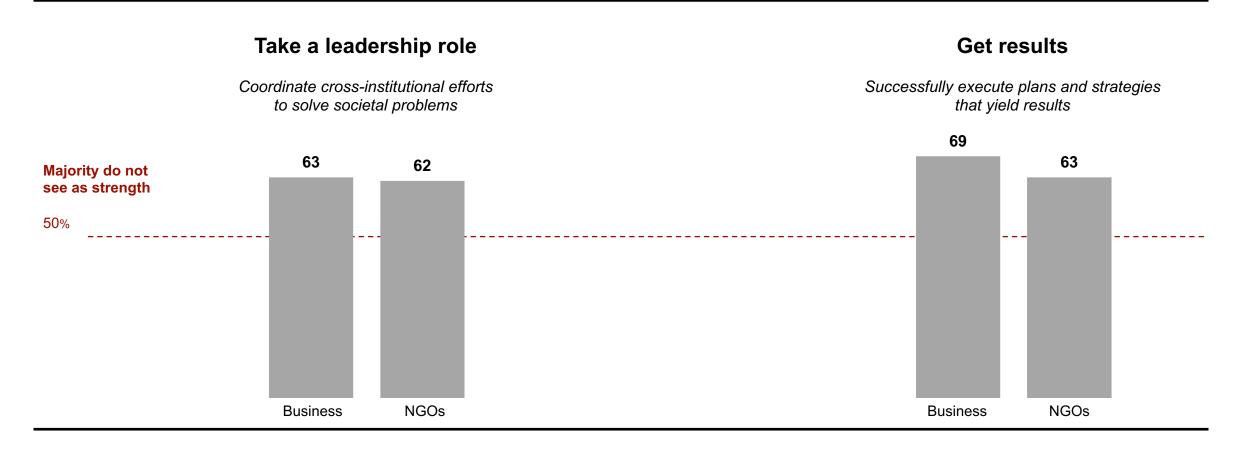
认同以下选项是该类机构优势的中国受访者占比





BUSINESS AND NGOS SEEN AS CAPABLE OF LEADING AND GETTING RESULTS

Percent who say each is a strength of institutions, in China





"我的雇主"在全球范围内均受信任

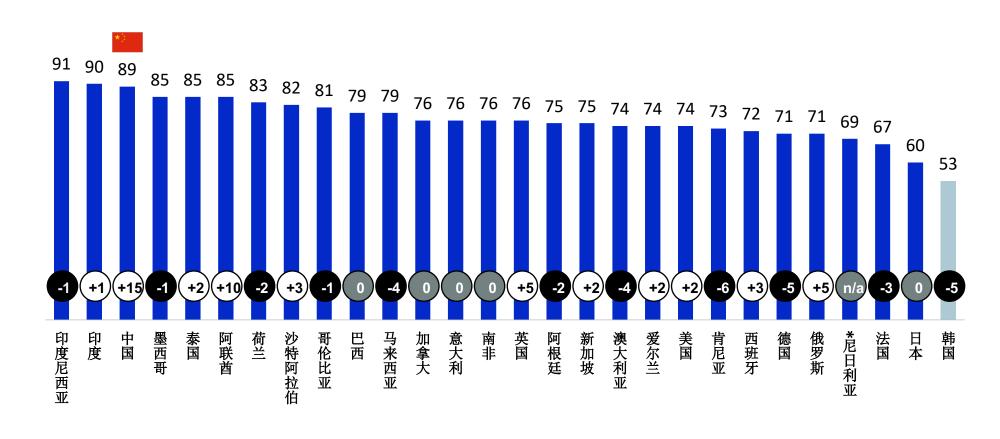
受访者的信任度占比



中国



企业	84
媒体	80
非政府组织	77

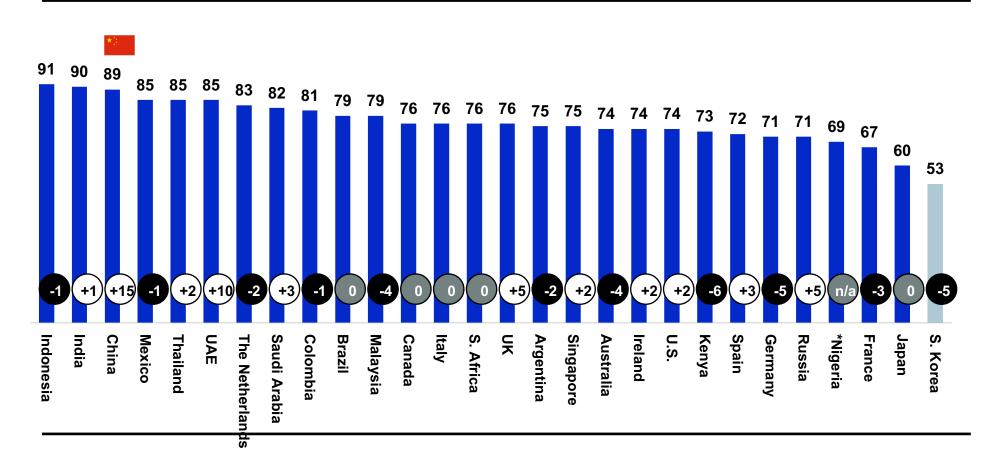


MY EMPLOYER TRUSTED AROUND THE WORLD

Percent trust

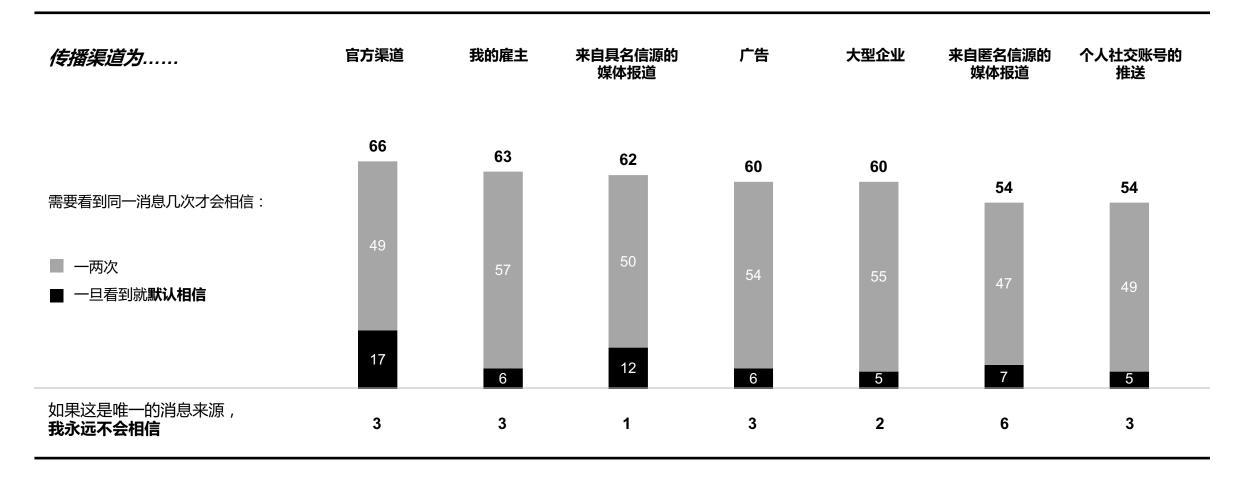






对雇主渠道的信息信任度仅次于官方渠道

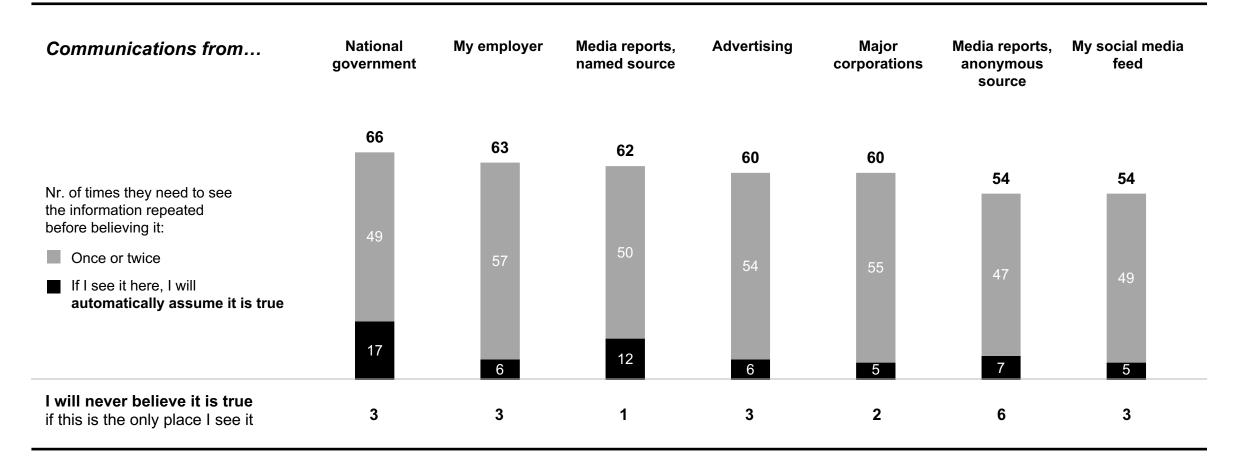
默认相信以下来源的信息,或看到不超过两次就相信的中国受访者占比

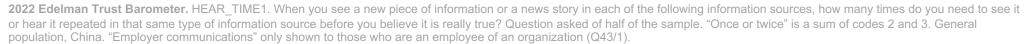




AFTER NATIONAL GOVERNMENT, MY EMPLOYER MOST CREDIBLE

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







CEO应成为推动社会进步的代言人

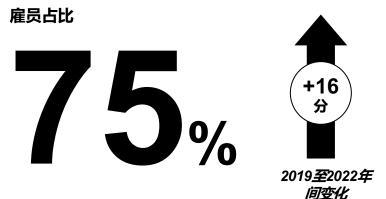
认同以下说法的受访者占比

在与外部利益相关方讨论公共政策或展现公司的社会贡献时, **CEO应亲自出面**

在选择工作时,我会考虑CEO是否能公开谈论**我所关心的 有争论的社会和时政问题**

中国

94(净值)



CEOS EXPECTED TO BE THE FACE OF CHANGE

Percent who say

CEOs should be personally visible

when discussing public policy with external stakeholders or work their company has done to benefit society When considering a job, I expect the CEO to speak publicly about **controversial social and political** issues that I care about

China

940/0

Among employees

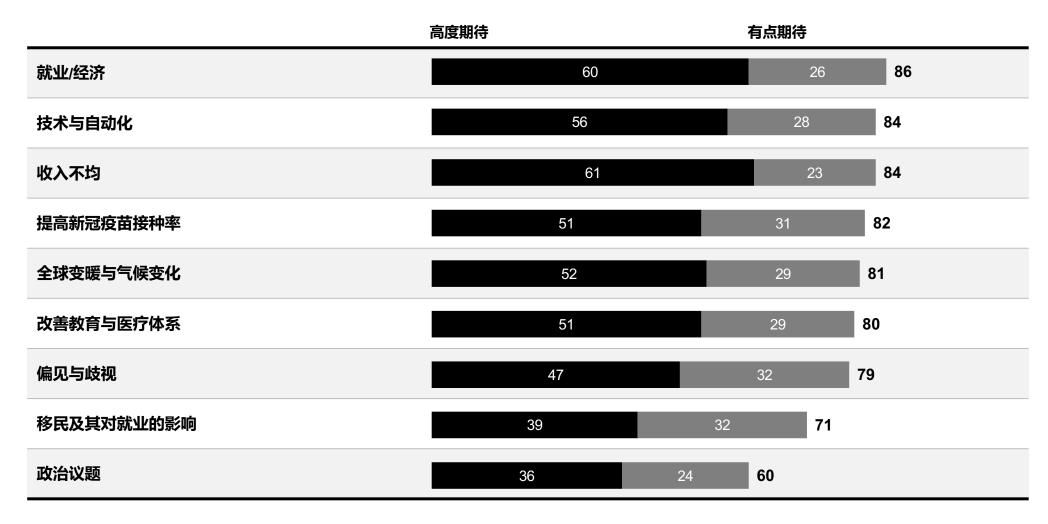
75%



2022 Edelman Trust Barometer. CEO_VIS. How visible do you think a CEO should personally be in these different types of business situations? 9-point scale; top 4 box, visible. Question asked of half of the sample. Data shown is a net of attributes 2 and 10. 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, important. Question asked of those who are an employee of an organization (Q43/1). General population. China.

CEO应积极支持社会政策的推进

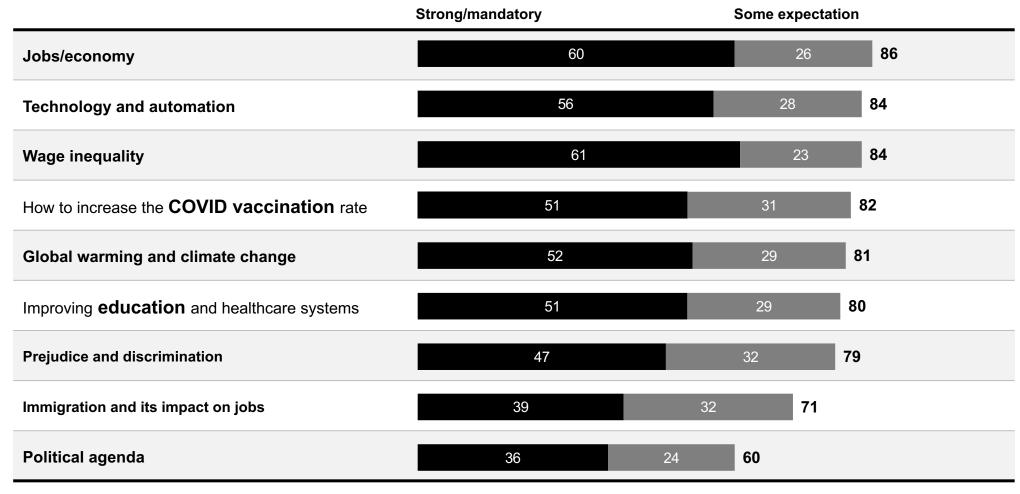
期待CEO能支持并推动持续对话和政策讨论的中国受访者占比





CEOS EXPECTED TO INFORM POLICY, NOT POLITICS

Percent who expect CEOs to **inform and shape conversations and policy debates** about each issue, in China



²⁰²² Edelman Trust Barometer. CEO_RSP. For each of the following topics, please indicate to what degree corporate CEOs should be held responsible for directly helping to inform and shape ongoing conversations and policy debates. 5-point scale; codes 4-5, strong/mandatory; code 3, some expectation. Question asked of half the sample. General population, China. "Improving education and healthcare" is an average of attributes 9 and 10. "Jobs/economy" is an average of attributes 11 and 12.





西方国家民众的 信任度在下降

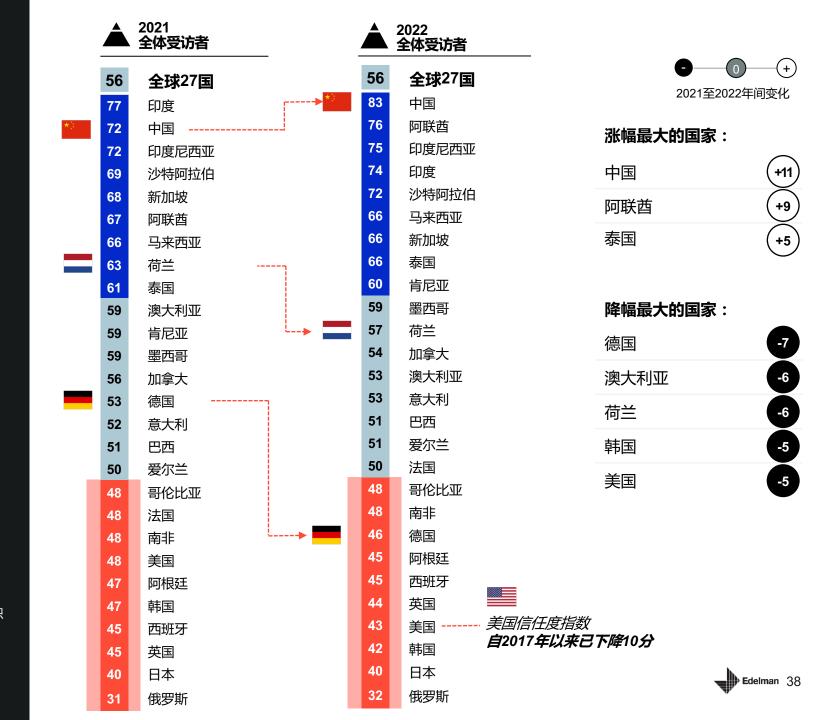
信任度指数



来源:《2022年度爱德曼信任度调查》

"信任度指数"是一个国家/地区的民众对其政府、企业、媒体和非政府组织 (NGO)的信任度平均值。

对于以下机构,请用1-9分的分值表明你的信任程度。前四项表述信任; 本数据来源于对全球27个国家和地区的普通线上受访者的调查。

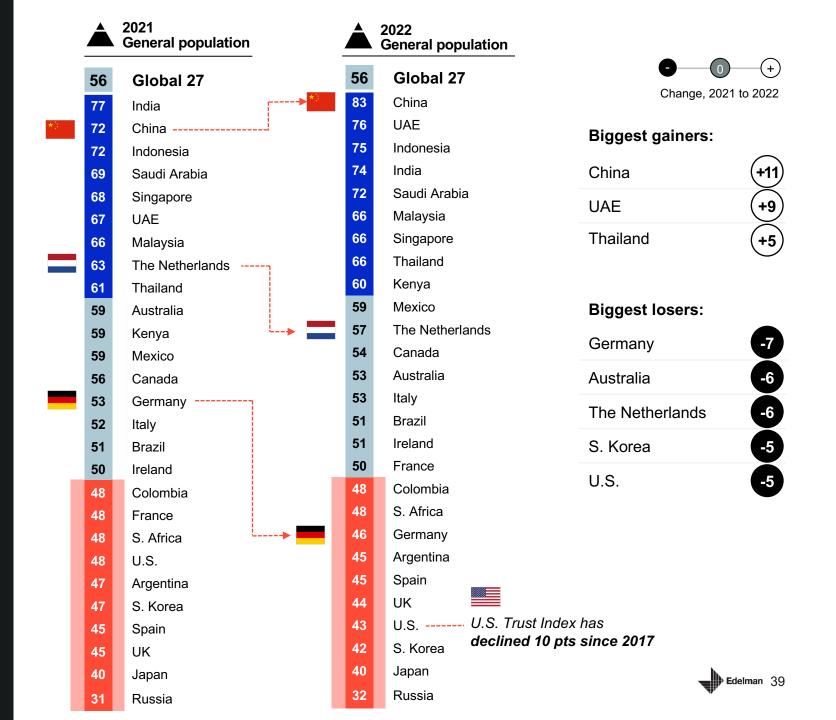


TRUST FALLS IN WESTERN DEMOCRACIES

Trust Index



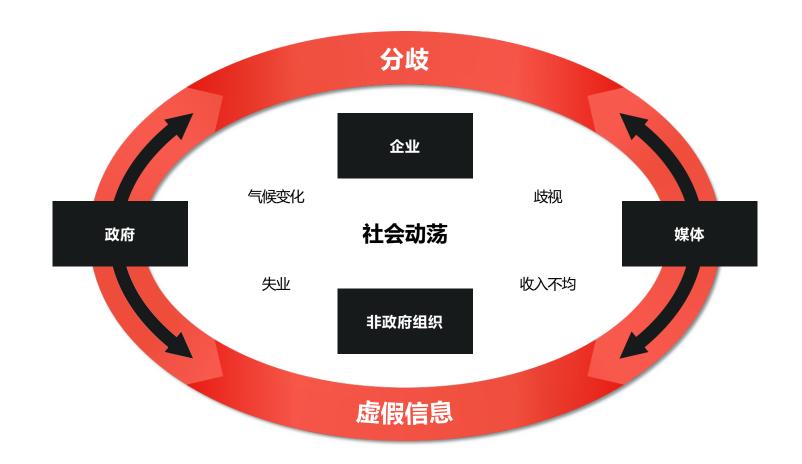
2022 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg.



失信循环, 动摇西方国家的社会稳定

政府和媒体为获得选票和关注度制造分歧 和虚假信息

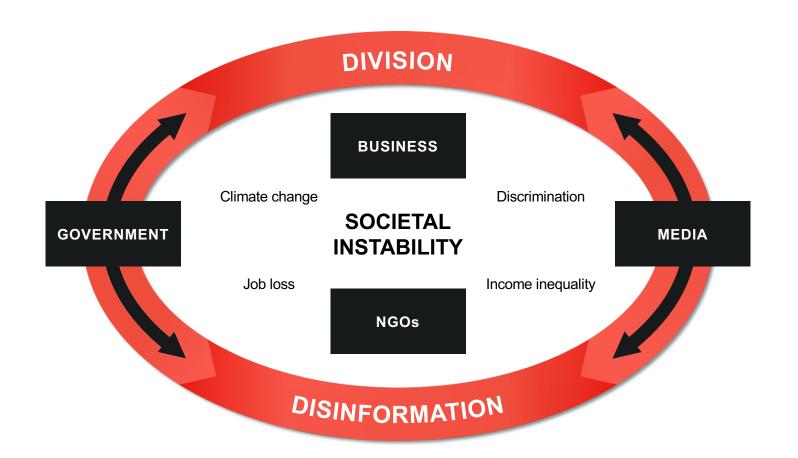
非政府组织和企业迫于压力,不得不面对超出其能力范围的社会问题



CYCLE OF DISTRUST THREATENS WESTERN SOCIETAL STABILITY

Government and media feed cycle of division and disinformation for votes and clicks

NGOs and business pressured to take on societal problems beyond their abilities



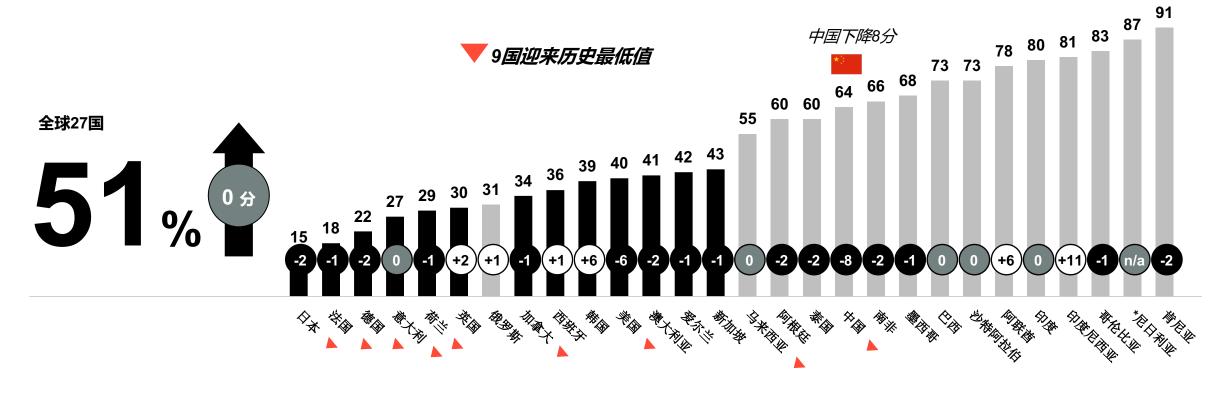
发达国家民众对经济前景态度不乐观

认为自身及其家庭状况将在未来五年有所改善的受访者占比

发达国家



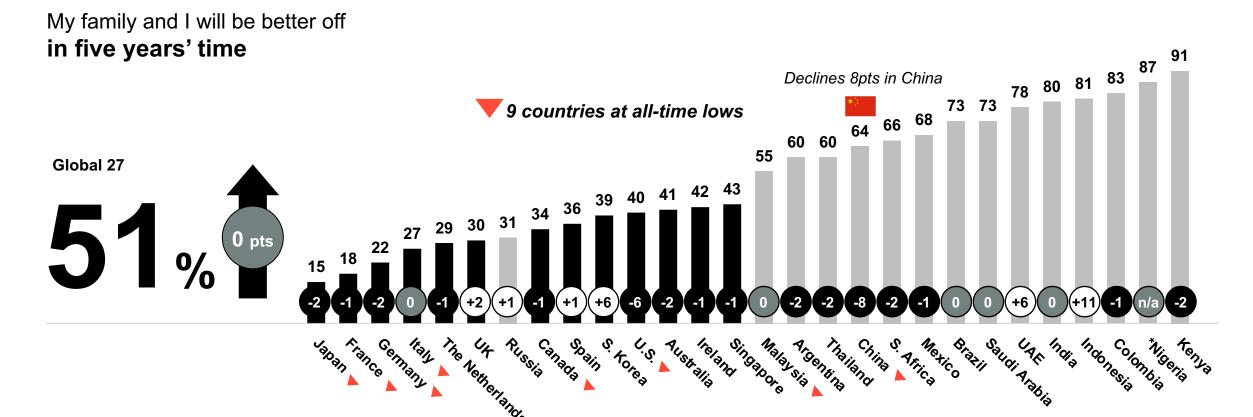
我和我的家人将在未来五年过得更好



DEVELOPED COUNTRIES LACK ECONOMIC OPTIMISM

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

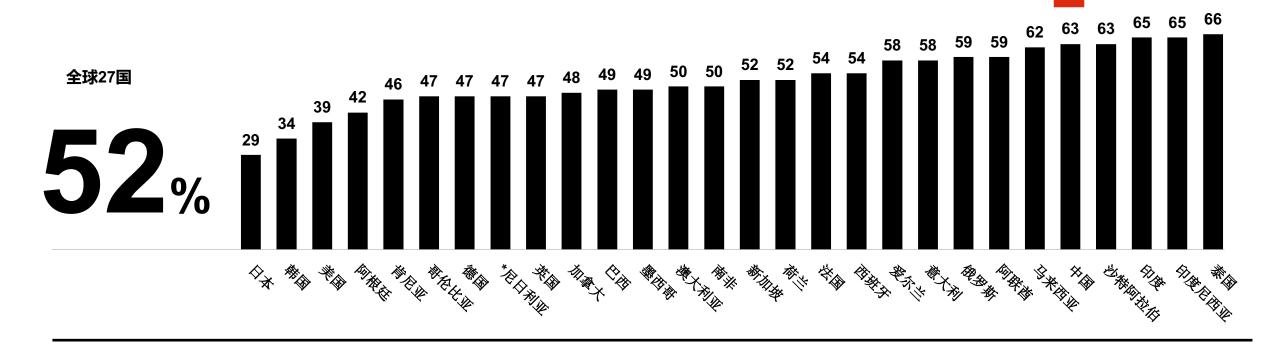
Developed countries + Change, 2021 to 2022



对资本主义制度开始质疑

认同以下说法的受访者占比

如今的资本主义对全世界而言弊大于利



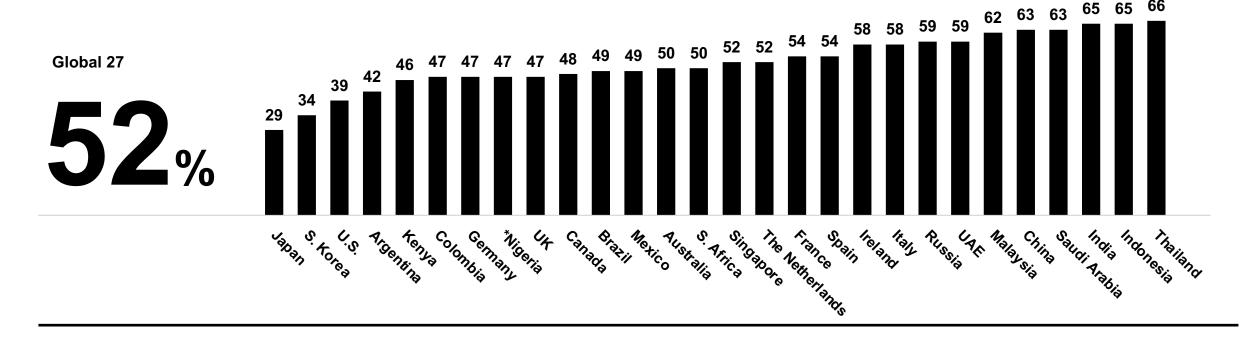


QUESTIONS ABOUT TODAY'S CAPITALISM

Percent who agree

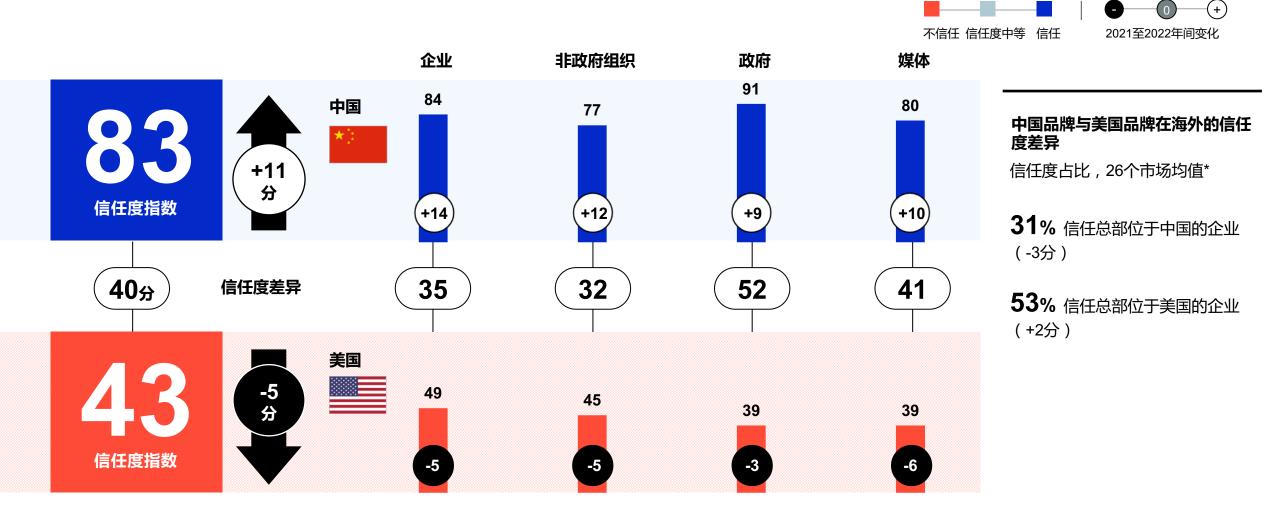
Capitalism as it exists today

does more harm than good in the world



中美信任度差异创历史新高

受访者的信任度占比

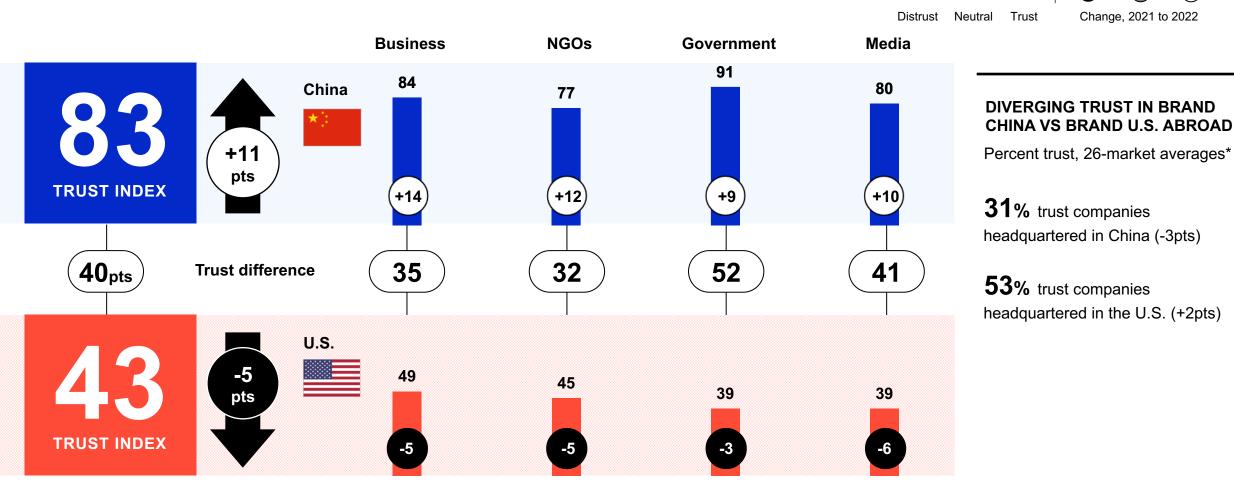


2022年《爱德曼全球信任度调查报告》 "信任度指数"是一个国家/地区的民众对其政府、企业、媒体和非政府组织(NGO)的信任度平均值。请用1-9分的分值表明你的信任程度。前四项表述信任; 数据来源于对中国和美国普通受访者的调查。TRU_NAT.现在我们将目光聚焦总部位于特定市场的全球企业。请描述您对于总部设于以下市场的全球企业会做正确事情的信任度。9分制;前4项表示信任。 半样本法调查受访。本数据来源于对全球26个国家和地区的普通线上受访者的调查。 *不包括对母国的评分



CHINA-U.S. TRUST DIVERGENCE WIDENS TO ALL-TIME HIGH

Percent trust, within each country



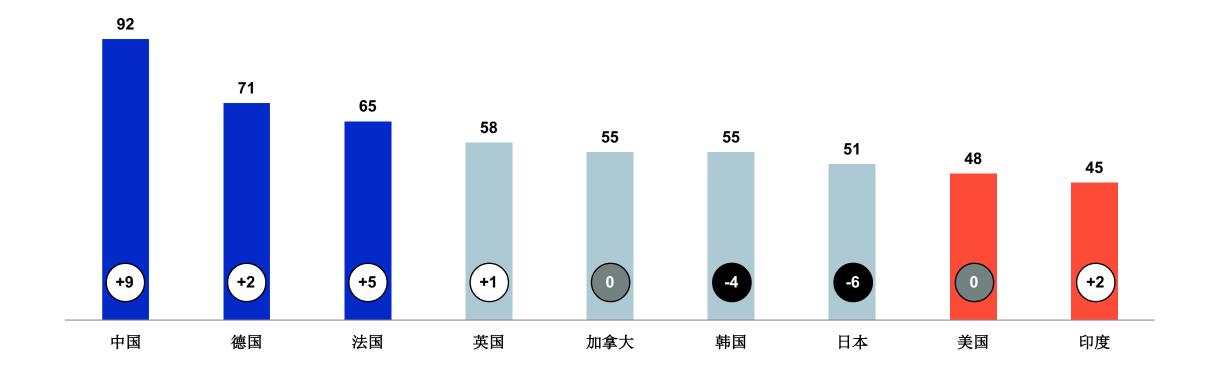
2022 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, China and U.S. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 26-mkt avg. *does not include home country rating.



民众对跨国企业品牌的信任参差不齐

中国受访者对总部位于以下各国的企业的信任度占比



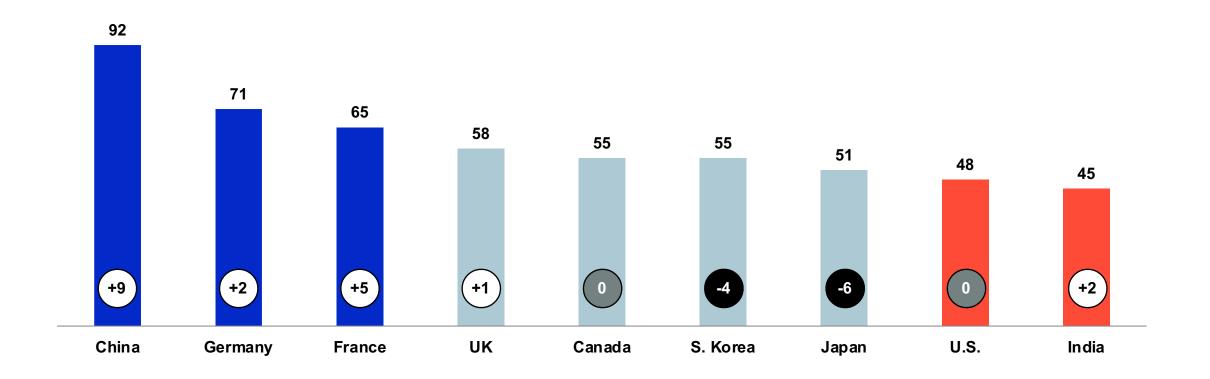




SOME WINNERS, SOME LOSERS

Percent trust in companies headquartered in each country, in China











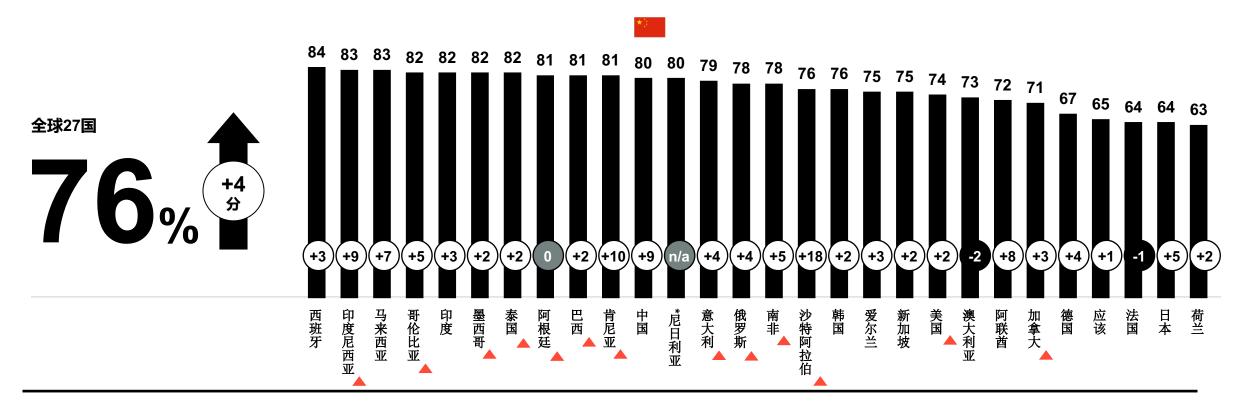
民众对虚假新闻的担忧创历史新高

认同以上说法的受访者占比

2021至2022年间变化

▲ 27国中有13个国家 达到历史最高值

我担心**虚假信息或假新闻**被当做武器使用





FAKE NEWS CONCERNS AT ALL-TIME HIGHS

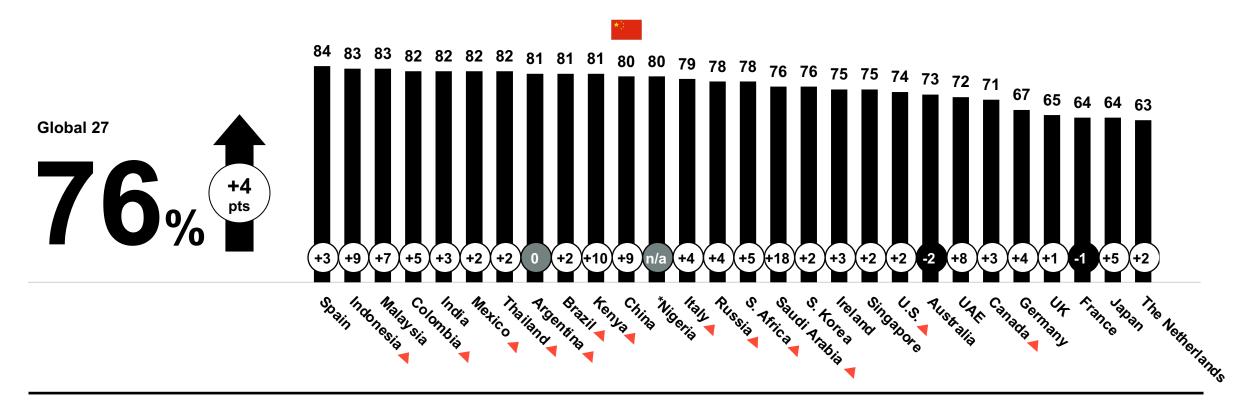
Percent who agree

Change, 2021 to 2022

▲ All-time high in

13 of 27 countries

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



三成公众默认"不相信",担忧难以开展建设性讨论

您更认可哪种说法?

认同以下说法的受访者占比

民众缺乏与持不同意见者开展建设性讨论的能力

3 **我倾向于始于不信任**,直到有证据表明其可信

我倾向于始于信任,直到有证据表明其不可信

59%

NEARLY 1 IN 3 DEFAULT TO DISTRUST: CONCERNS ABOUT BASIS FOR CONSTRUCTIVE DEBATE

Which are you more likely to believe?

30%

My tendency is to distrust until I see evidence that something is trustworthy

VS

My tendency is to trust until I see evidence that something is untrustworthy

Percent who agree

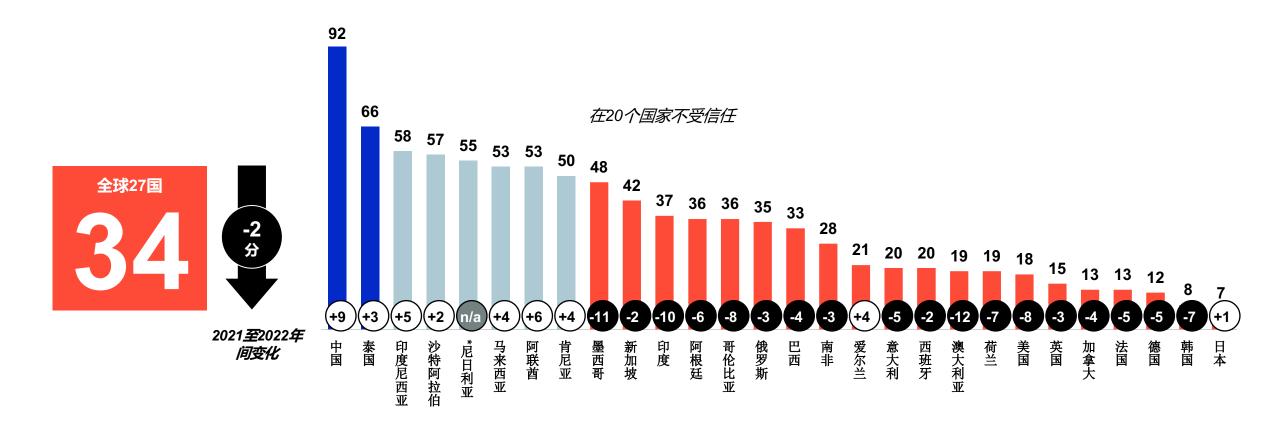
People in this country lack the ability to have constructive and civil debates about issues they disagree on

59%

三分之二的受访国家对中国品牌的信任度下降

对总部位于中国的企业的信任度占比

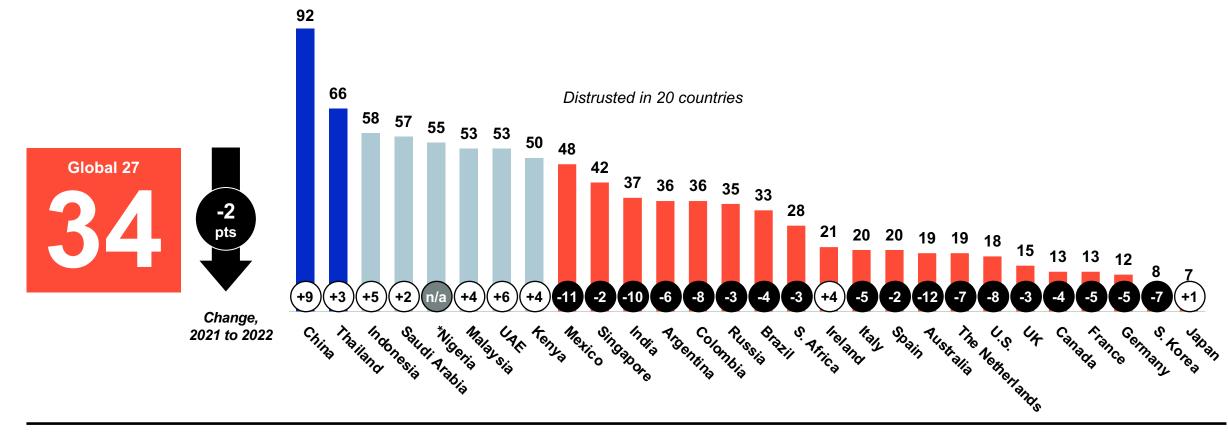




TRUST IN BRAND CHINA DECLINES IN 18, GAINS IN 9 OF 27 COUNTRIES

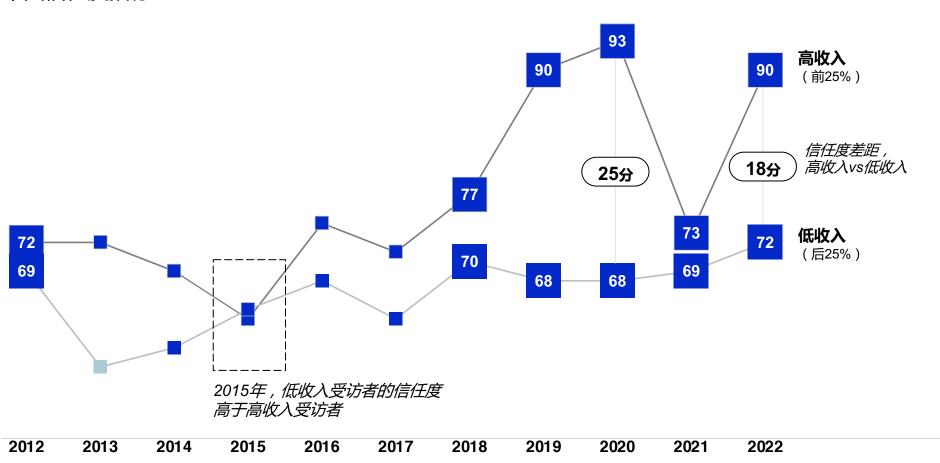
Percent trust in companies headquartered in China

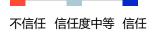




低收入与高收入人群的信任失衡回升至两位数

中国信任度指标



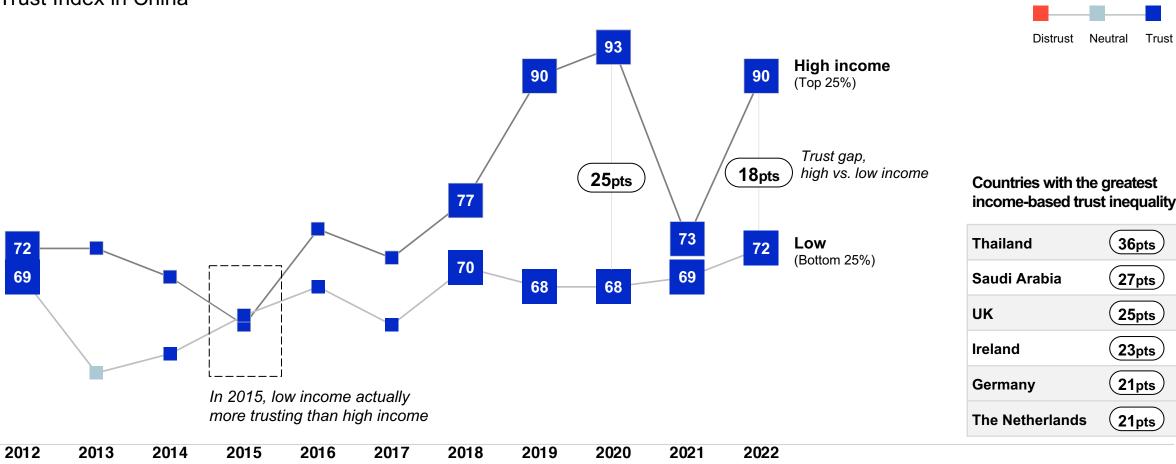


按收入划分的信任度差距最大 的国家

泰国	36分
沙特阿拉伯	27分
英国	25分
爱尔兰	23分
德国	21分
荷兰	21分

TRUST GAP BETWEEN LOW AND HIGH INCOME RETURNS TO DOUBLE-DIGITS

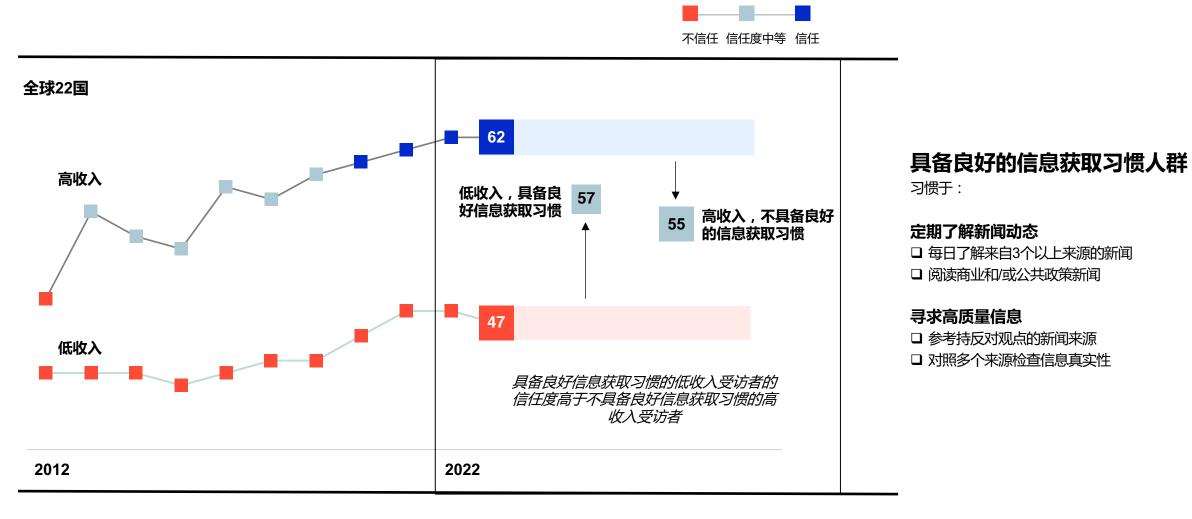
Trust Index in China





良好的信息素养有助于缓解信任失衡

信任度指标

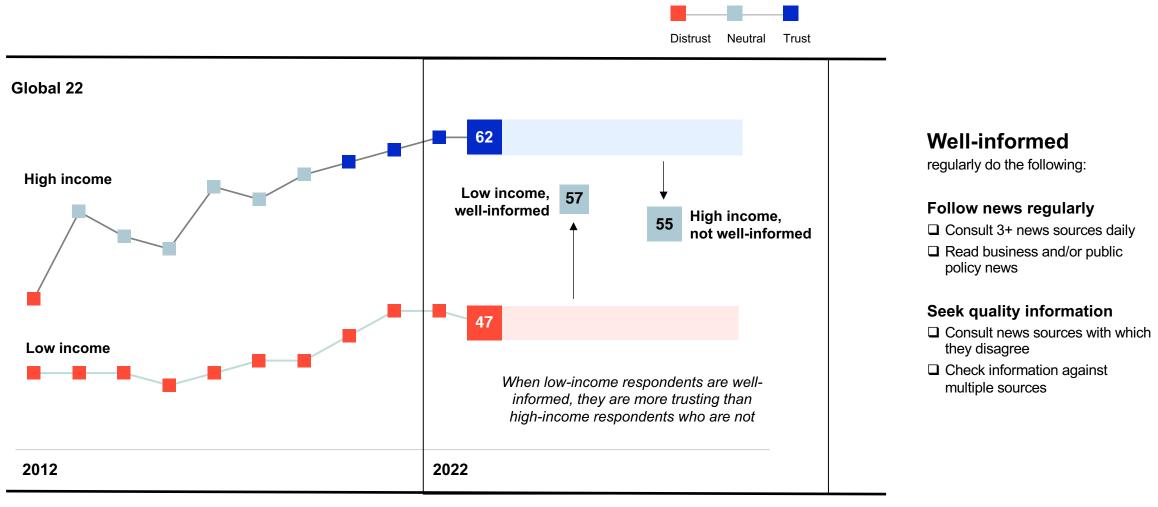


2022年《爱德曼全球信任度调查报告》 "信任度指数"是一个国家/地区的民众对其政府、企业、媒体和非政府组织(NGO)的信任度平均值。 TRU_INS对于以下机构,请用1-9分的分值表明你的信任程度。前四项表述信任;本数据来源于对全球22个国家和地区的普通线上受访者调查,按收入划分。 "媒体消费" 衡量标准,来源于对全球22个国家和地区的普通线上受访者调查,按收入划分。关于如何建立 "具备良好的信息获取习惯" 衡量标准的详情,参见"技术附录"。



GOOD INFORMATION CAN HELP CLOSE THE SOCIETAL DIVIDE





2022 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, 22-mkt avg., by income. Media Consumption scale. General population, 22-mkt avg., by income. For full details on how the Well-Informed Scale was built, please refer to the Technical Appendix.

优质信息成为各类机构最有力的建设信任的工具

有助于获得信任的因素(前5名)

企业	% pt 涨幅
优质信息	3.0
问责	2.5
沟通和透明度	2.3
有效发挥力量	2.1
取得成果	1.8

非政府组织	% pt 涨幅
优质信息	3.2
有效发挥力量	2.4
与其他机构和组织合作	2.3
扮演领导角色	2.1
变革管理	2.0

政府	% pt 涨幅
优质信息	6.1
扮演领导角色	3.7
有效发挥力量	3.5
长远的思考和规划	3.2
问责	3.2

媒体	% pt 涨幅
优质信息	6.6
沟通和透明度	3.2
有效发挥力量	2.5
变革管理	2.2
问责	2.0

2022年《爱德曼全球信任度调查报告》回归分析。CMP_ARE_[INS].根据[机构]的现状,请指出您认为以下各方面是其优势还是劣势。5分制;前面2项表示优势。半样本法调查受访。TRU_INS.对于以下机构,请用1-9分的分值表明你的信任程度。前四项表述信任;本数据来源于对全球24个国家和地区的普通线上受访者的调查。 关于这一数据计算方法的完整解释,参见"技术附录"。CMP_ARE_[INS]未收集中国、泰国和俄罗斯的数据。

INFORMATION QUALITY NOW MOST POWERFUL TRUST BUILDER ACROSS INSTITUTIONS

Potential trust gain associated with doing each well (top 5)

Business	% pt gain
Information quality	3.0
Hold others accountable	2.5
Communication and transparency	2.3
Exert power effectively	2.1
Get results	1.8

NGOs	% pt gain
Information quality	3.2
Exert power effectively	2.4
Work with other institutions and organizations	2.3
Take a leadership role	2.1
Change management	2.0

Government	% pt gain
Information quality	6.1
Take a leadership role	3.7
Exert power effectively	3.5
Long-term thinking and planning	3.2
Hold others accountable	3.2

Media	% pt gain
Information quality	6.6
Communication and transparency	3.2
Exert power effectively	2.5
Change management	2.2
Hold others accountable	2.0

重塑信任,共同推进社会稳定

企业将继续保持其社会角色

民众希望企业发挥更大的领导力

展示切实的进展

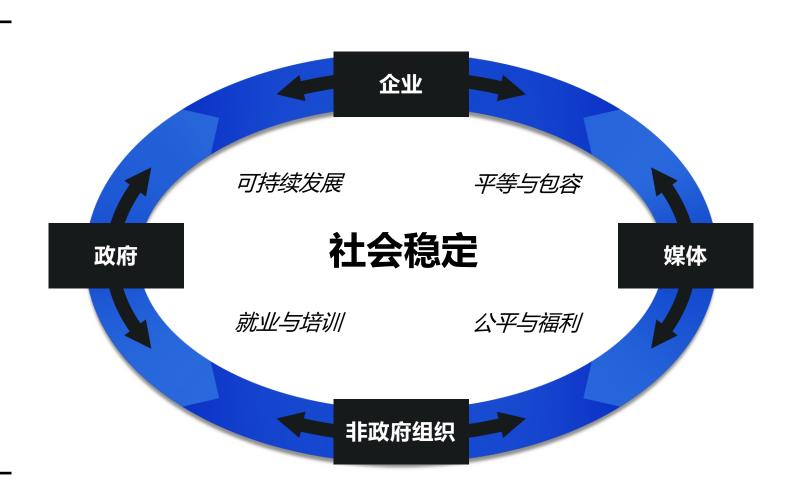
重塑对社会建设更美好未来的信心:展示体系的有效性。

领导层面须关注长远的思考

解决方案而非分歧;长期思维而非短期利益。

所有机构均须提供可信信息

清晰、一致、基于事实的信息是打破恶"信"循环的关键。



RESTORING TRUST IS KEY TO SOCIETAL STABILITY

Business societal role is here to stay

People want more business leadership, not less.

Demonstrate tangible progress

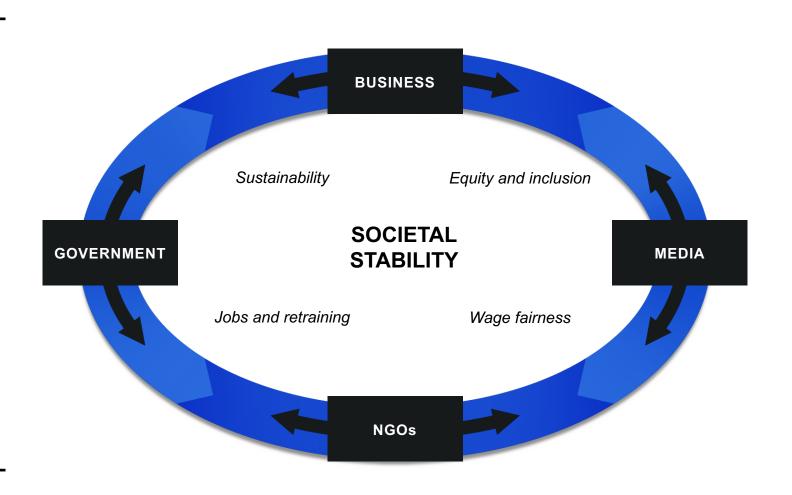
Restore belief in society's ability to build a better future: show the system works.

Leadership must focus on long-term thinking

Solutions over divisiveness; long-term thinking over short-term gain.

Every institution must provide trustworthy information

Clear, consistent, fact-based information is critical to breaking the cycle of distrust.





仲佳伟

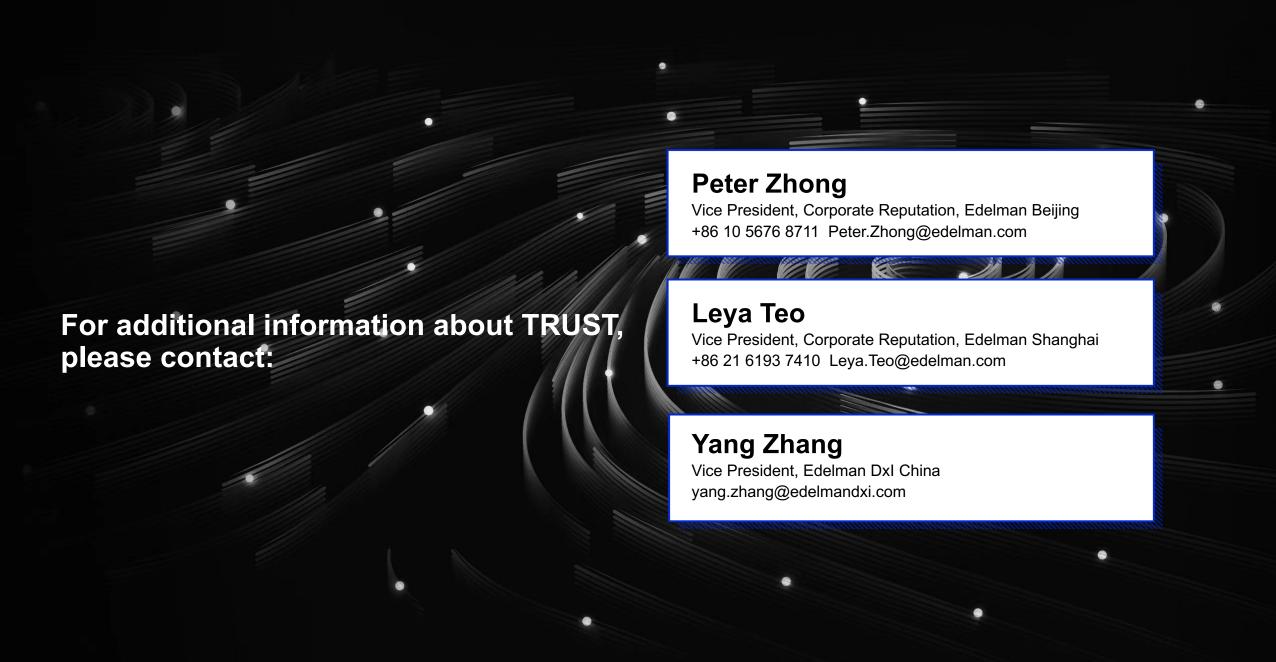
副总裁,企业传播与声誉管理,爱德曼中国peter.zhong@edelman.com

张帼慧

副总裁,企业传播与声誉管理,爱德曼中国 leya.teo@edelman.com

张扬

副总裁,爱德曼智库中国 yang.zhang@edelmandxi.com





欢迎微信关注爱德曼中国

