



# 2019 EDELMAN TRUST BAROMETER

French Report

#TrustBarometer



# 19<sup>th</sup> 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)

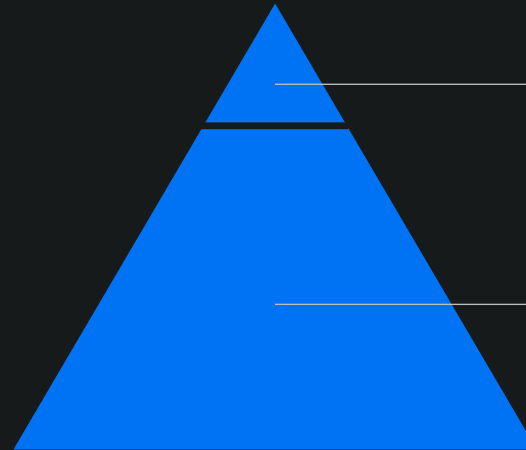
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

## 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

# 2019 French Supplement – Post “Gilets Jaunes” survey

Fieldwork was conducted between the  
15<sup>th</sup> and 21<sup>st</sup> of January 2019

**2019 GJ**

This symbol denotes French data  
from the French supplementary  
survey

## Methodology

### General Online French Population

1011 respondents

Ages 18+ National representative of the French Population

All slides show general online population data unless otherwise noted



### Informed Public

250 informed Public including a boost of 150

Represents 15% of total global population

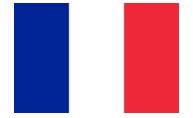
Must meet 4 criteria

- 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

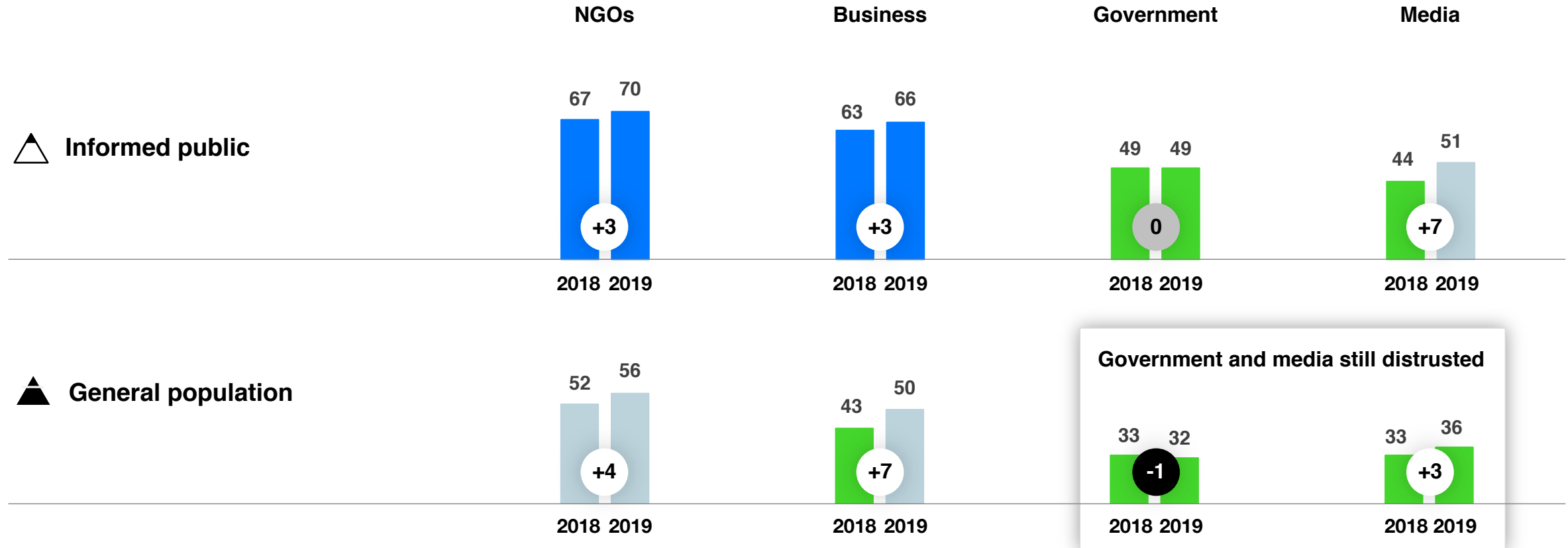
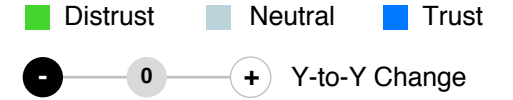
A black and white photograph capturing a busy public space, likely a transit station or a large indoor walkway. The background is a wall composed of large, light-colored rectangular panels arranged in a grid. In the foreground and middle ground, several people are walking, their figures blurred to convey a sense of motion and a fast-paced environment. The lighting is bright, creating strong shadows and highlights on the floor and wall. The overall mood is one of constant activity and movement.

# A Fragile Trust, in a Context of Strong Disappointment

# A MODEST RISE IN TRUST FROM WHICH THE GOVERNMENT DOESN'T BENEFIT

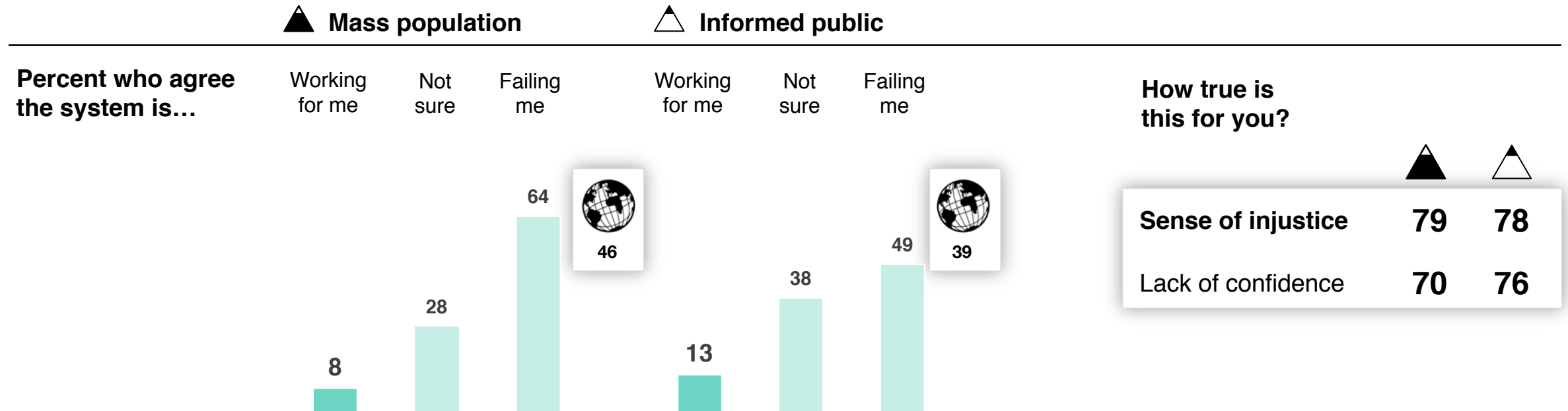


Percent trust



**Government and media still distrusted**

# WIDESPREAD LACK OF BELIEF IN THE SYSTEM



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, France. 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].



# Strong Destabilization in a Vulnerable Context

# A SIGNIFICANT DECREASE OF TRUST IS OBSERVED

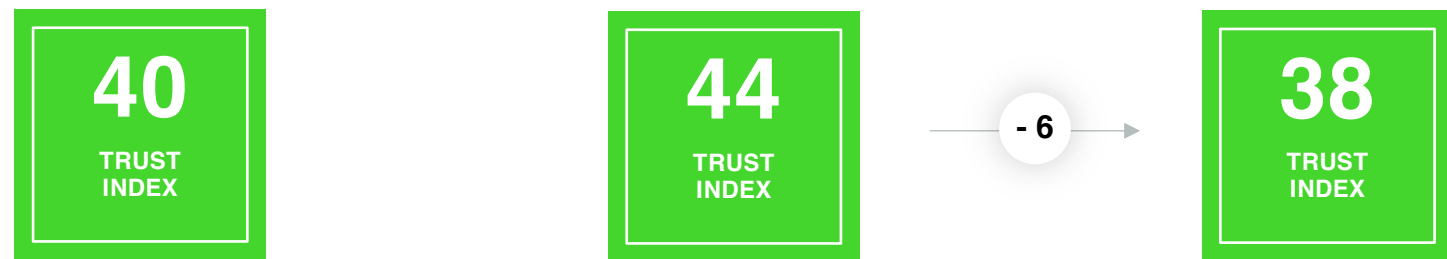


Trust index

△ Informed public



▲ General population



2018

2019

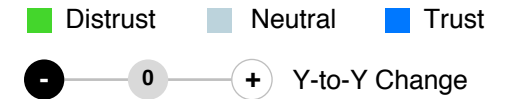
2019 GJ



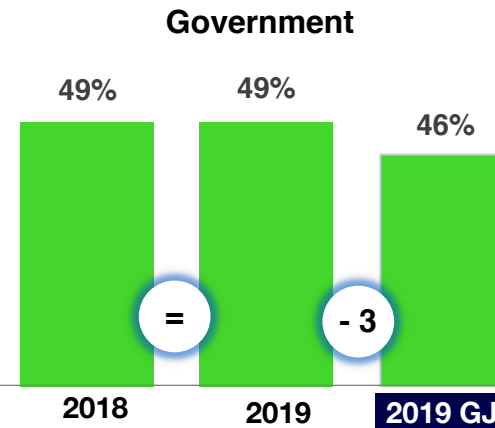
# TRUST IN GOVERNMENT FURTHER ERODED



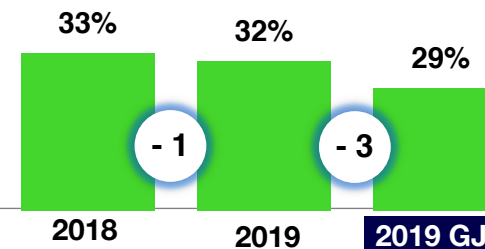
Percent trust



△ Informed public



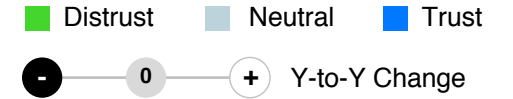
▲ General population



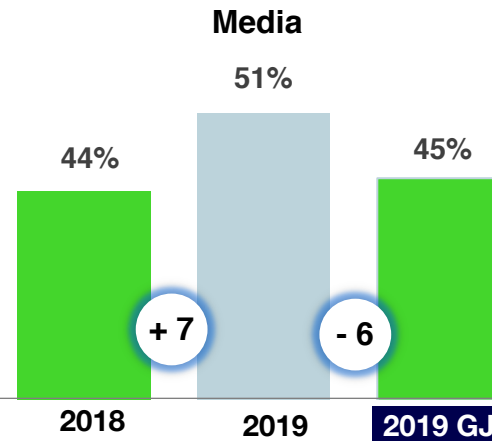
# MEDIA SANCTIONED, LOOSING THE POSITIVE TREND ACHIEVED SINCE 2018



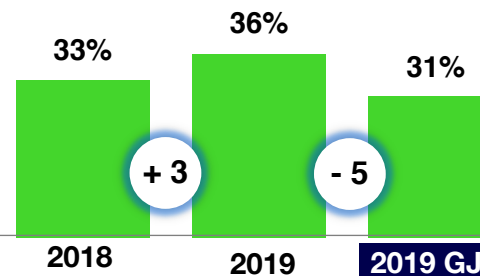
Percent trust



△ Informed public



▲ General population



# ALL MEDIA SOURCES IMPACTED BY THE DECREASE

Percent trust in media and media sources



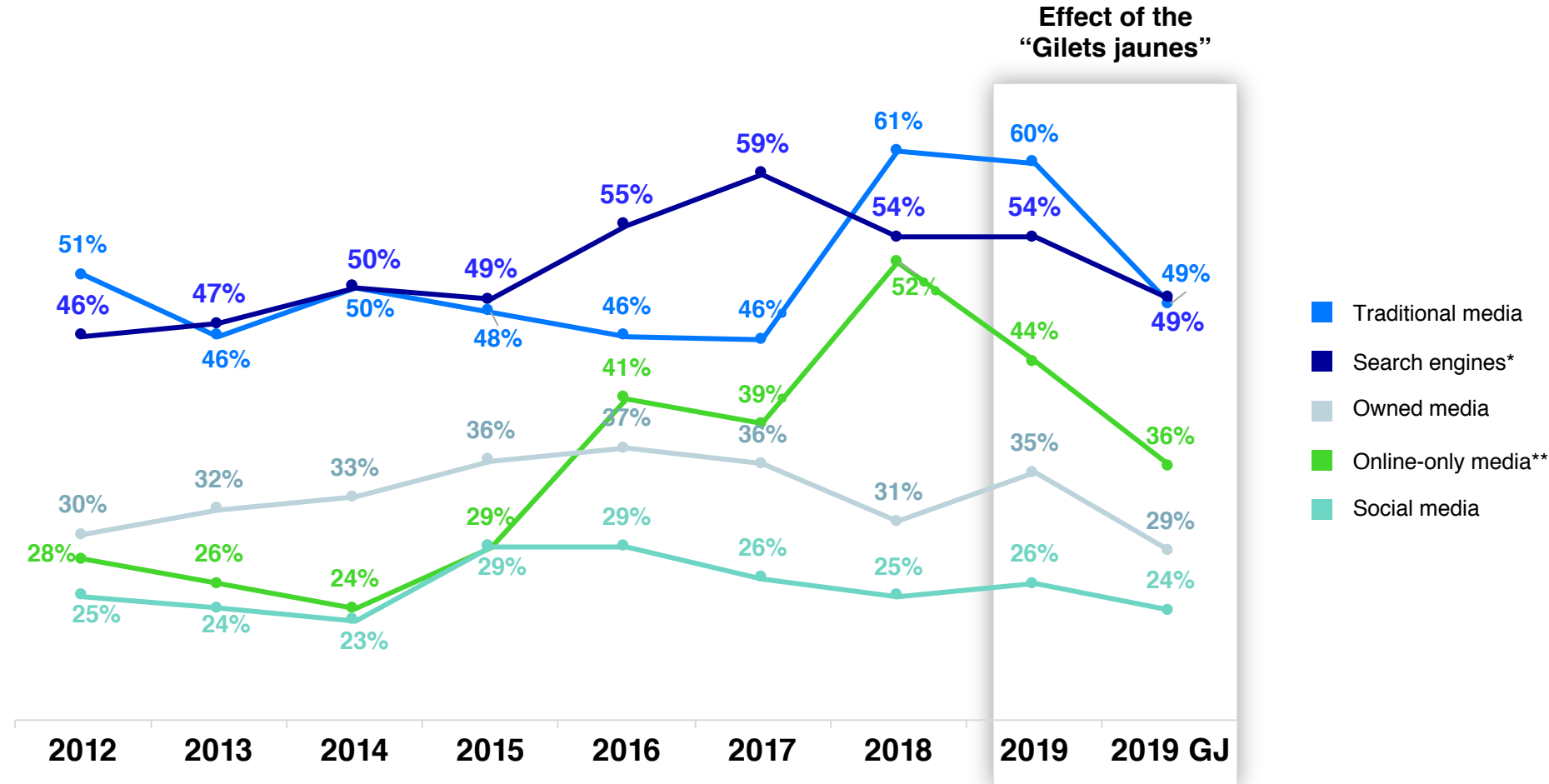
# 36%

Trust in media in 2019

-5

# 31%

Trust in media after the  
“Gilets jaunes” Movement



2019 French Trust Supplement. 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. General population,

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. General population.

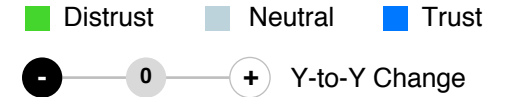
\*From 2012-2015, “Online Search Engines” were included as a media type. In 2016, this was changed to “Search Engines.”

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

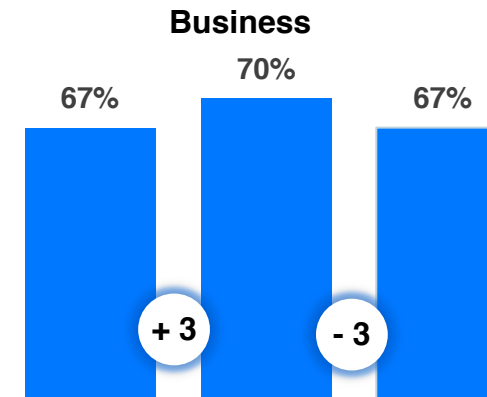
# EVEN NGOs, TRADITIONALLY SAFE-HAVEN, WERE AFFECTED BY THIS DECREASE



Percent trust

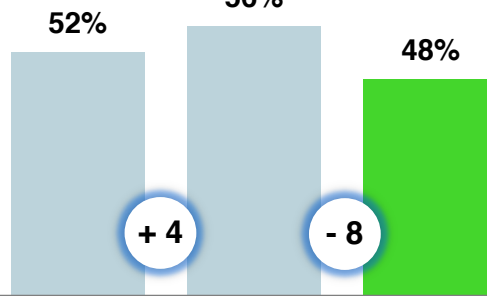


△ Informed public



2018      2019      2019 GJ

▲ General population

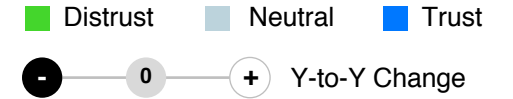


2018      2019      2019 GJ

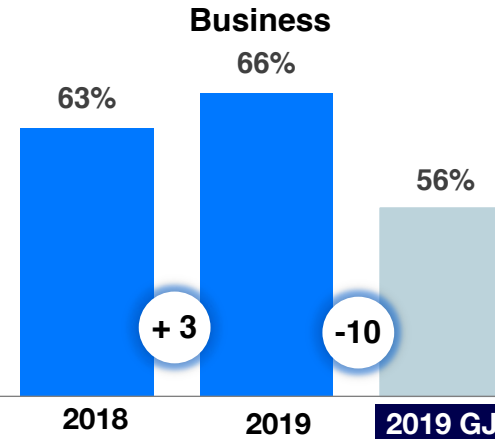
# BUSINESS HAS SLIPPED TO THE DISTRUST ZONE AFTER A SIGNIFICANT RISE



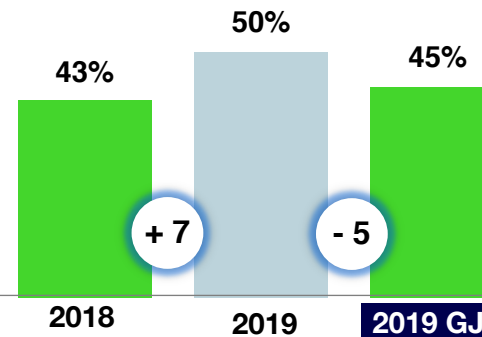
Percent trust



△ Informed public



▲ General population

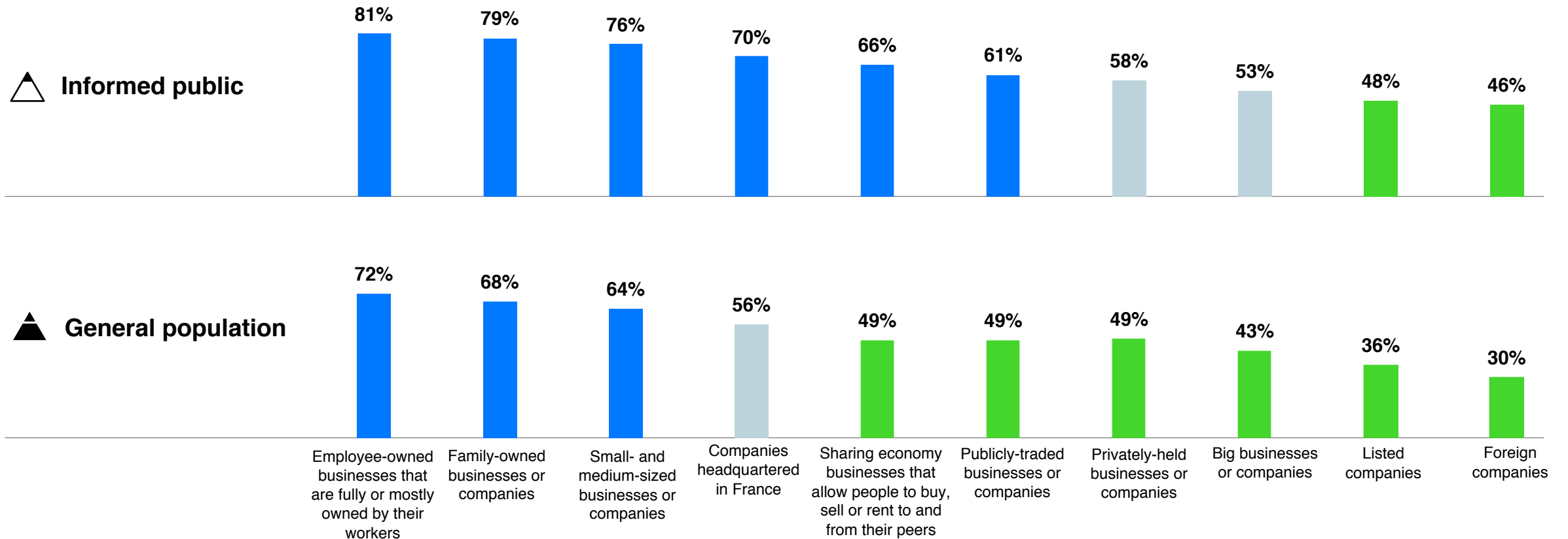


# PROXIMITY SEEMS TO BE A TRUST LEVER

Percent trust



■ Distrust ■ Neutral ■ Trust

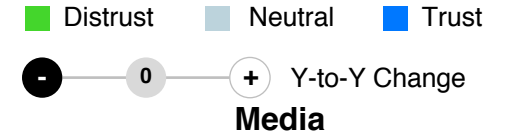


2019 French complement. TRU\_COMP. Thinking about different types of businesses, please indicate how much you trust each type of business to do what is right using a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.”

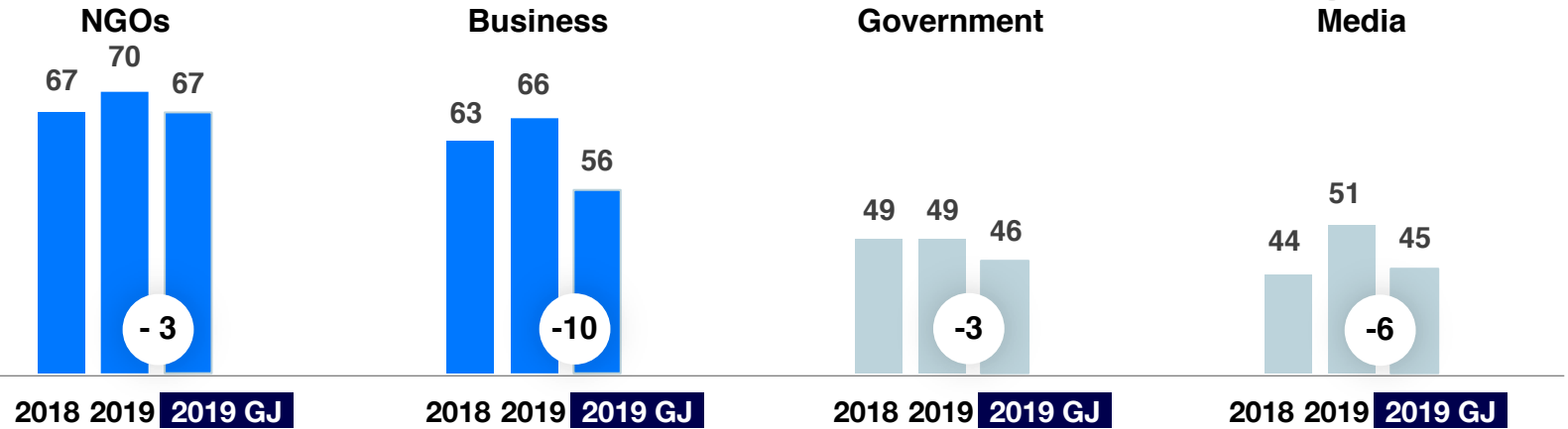
# IN THE END, THE FOUR MAIN INSTITUTIONS HAVE BEEN IMPACTED



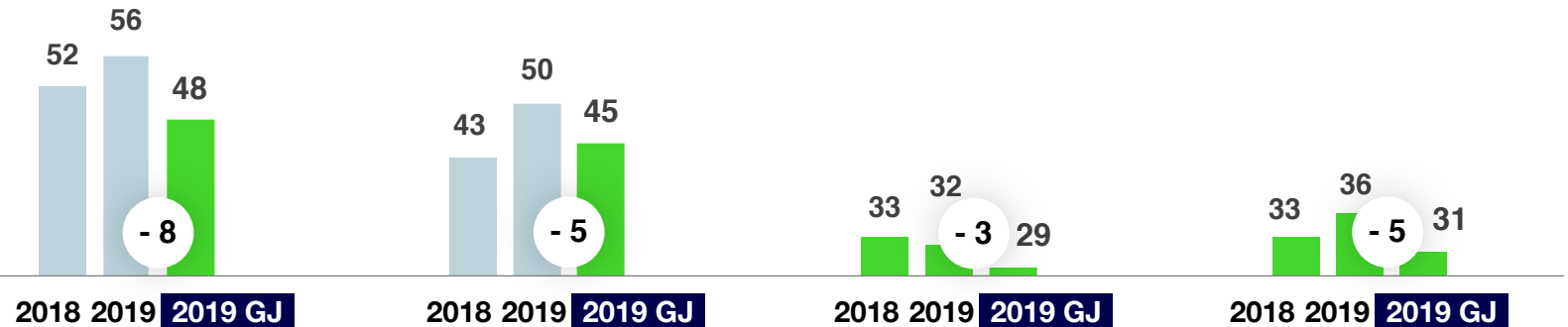
Percent trust



△ Informed public



▲ General population

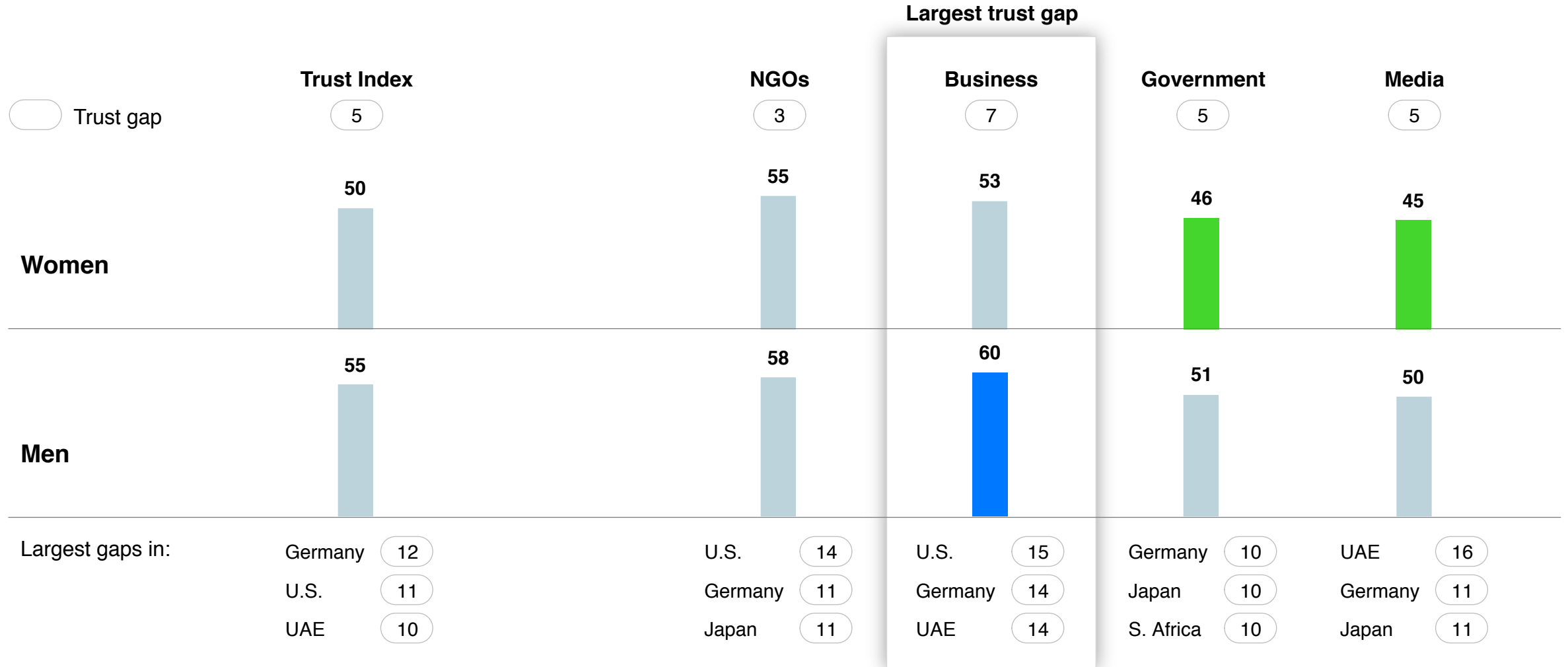


# A STRUCTURAL PESSIMISM WITHIN FEMALE POPULATION



Percent trust

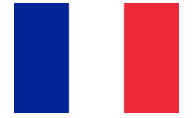
■ Distrust ■ Neutral ■ Trust



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.

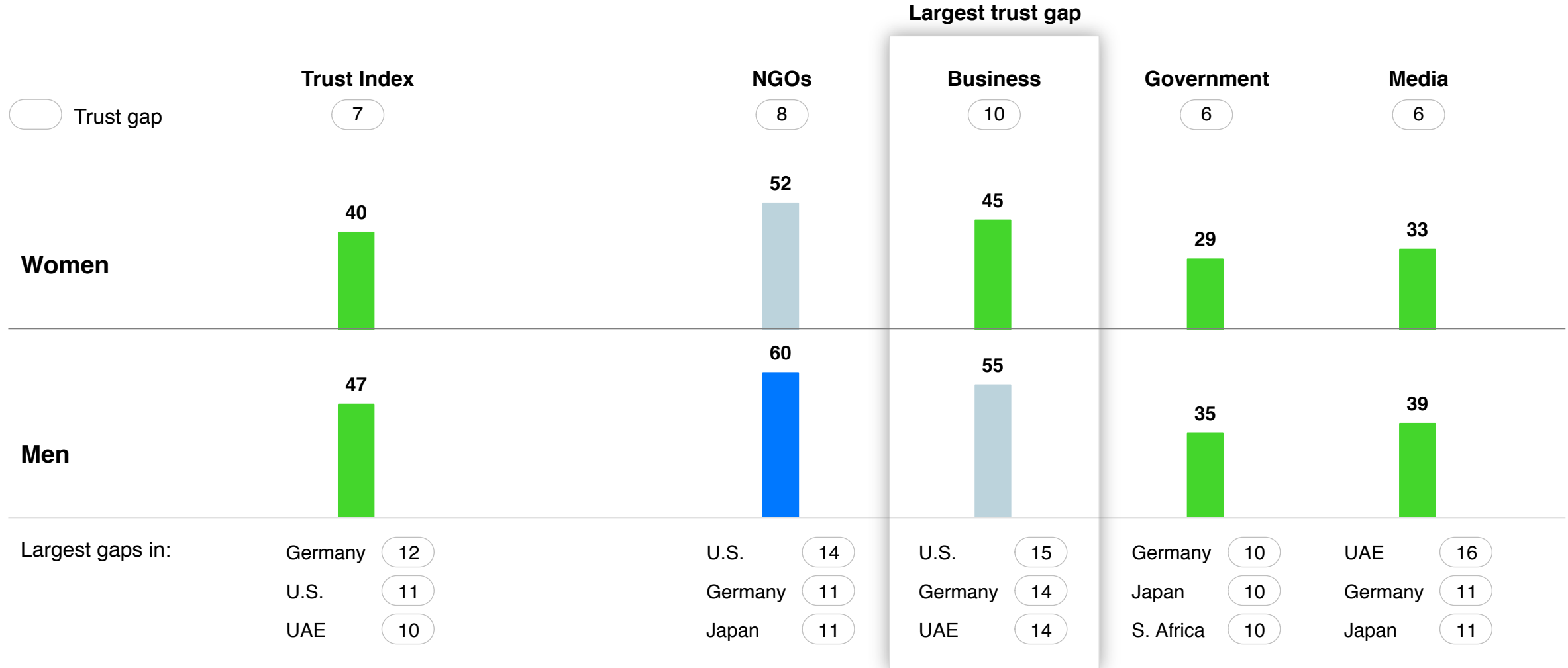


# FRANCE ABOVE THE AVERAGE GENDER GAP



Percent trust

■ Distrust ■ Neutral ■ Trust

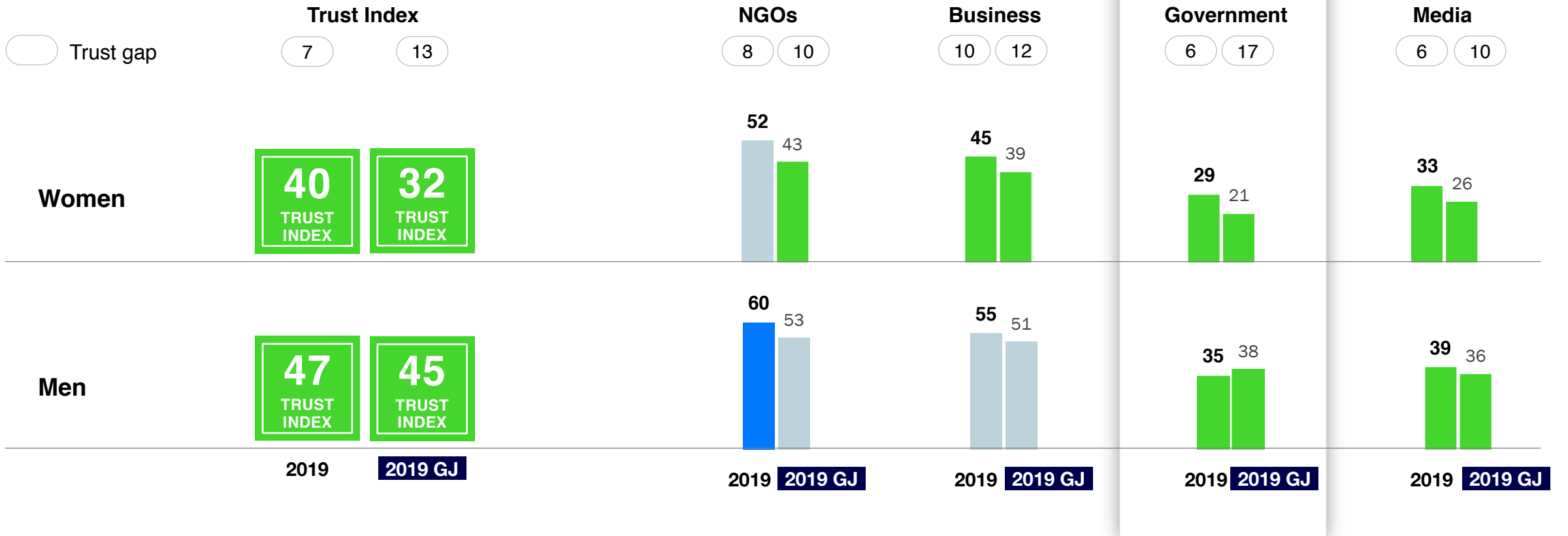


2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. General population, France, by gender.

# A GAP THAT HAS WIDENED WITH THE “GILETS JAUNES” MOVEMENT



Percent 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.



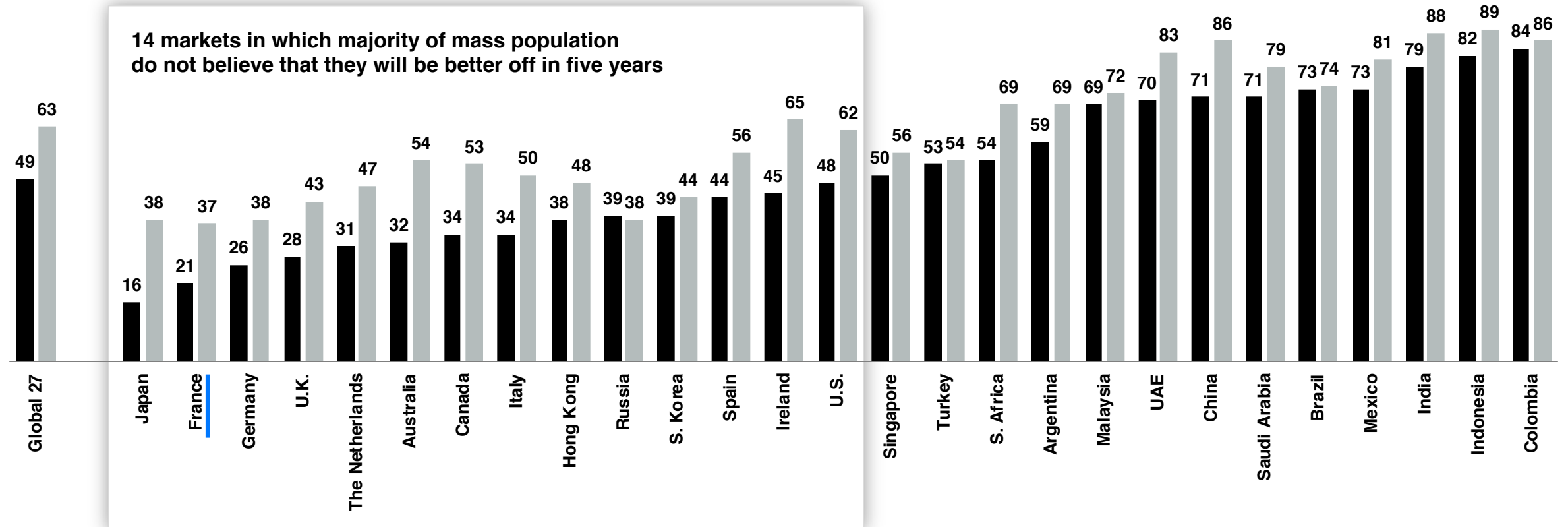
# A Desire for Change & Action



# FRANCE AMONG THE MOST PESSIMISTIC COUNTRIES IN THE WORLD

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

■ Mass population ■ Informed public



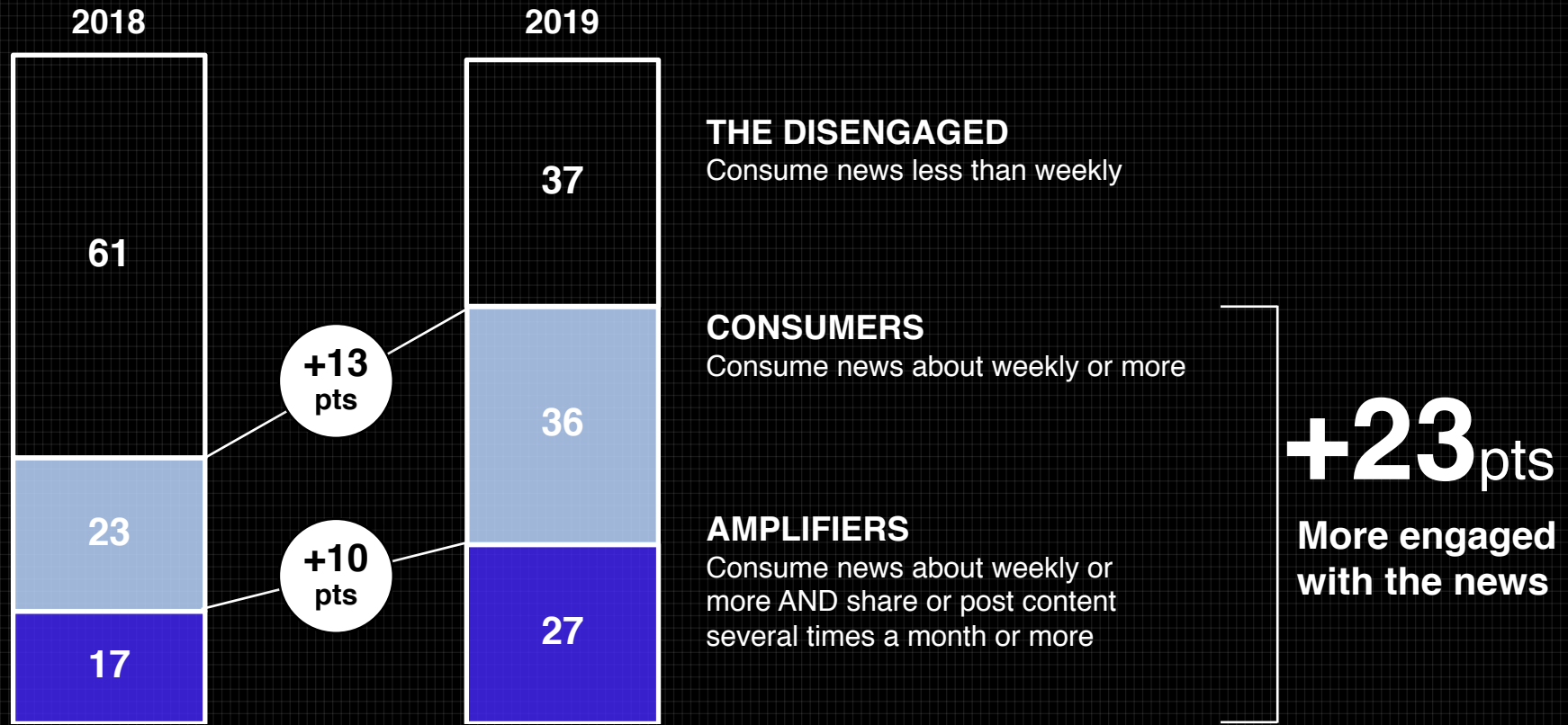
2019 Edelman Trust Barometer. CNG\_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. Informed public and mass population, 27-market average.

# A MASSIVE RISE IN NEWS ENGAGEMENT: STAYING INFORMED AS A FIRST SIGN OF ACTION



- 0 + Y-to-Y Change

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



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, France. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.



**My Employer:  
A Trusted Partner  
for Change**

# MY EMPLOYER MOST-TRUSTED RELATIONSHIP

Percent trust

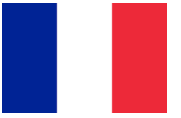
 Distrust  Neutral  Trust

**MY EMPLOYER 66%**

**NGO's  
BUSINESS  
MEDIA  
GOVERNMENT**

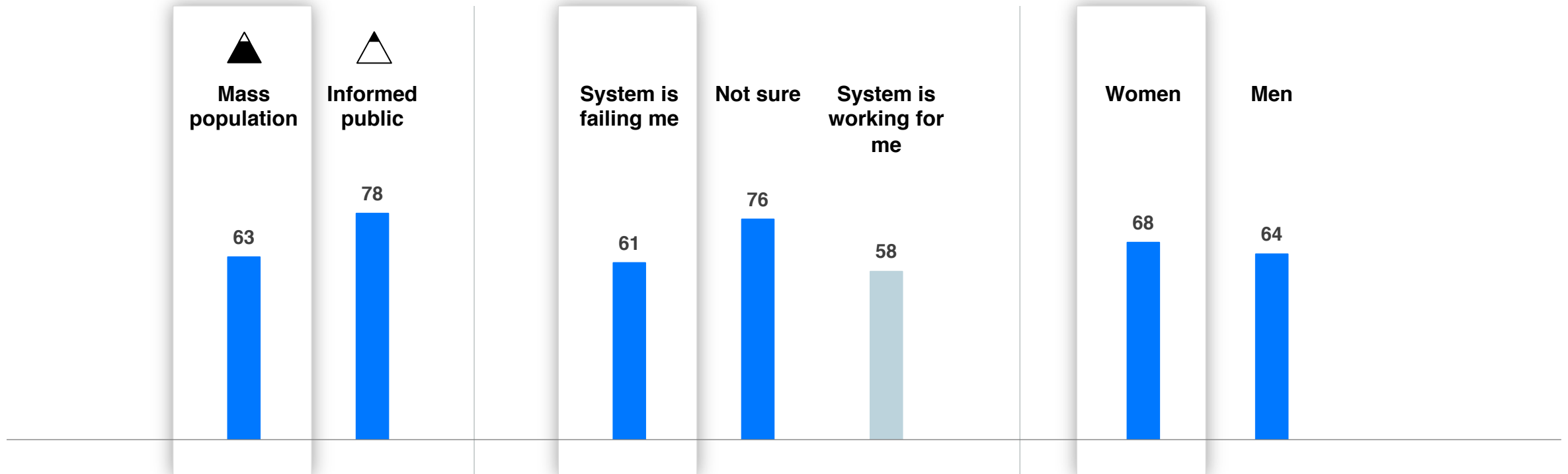
2019 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; 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, France.

# EMPLOYERS TRUSTED EVEN BY THE DISENFRANCHISED



Percent trust in “my employer”

■ Distrust ■ Neutral ■ Trust



2019 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 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. Question asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population employees, mass population employees and informed public employees, France, by gender, and “system failing” scale.

For details on how the “system failing” measure was calculated, please refer to the Technical Appendix.

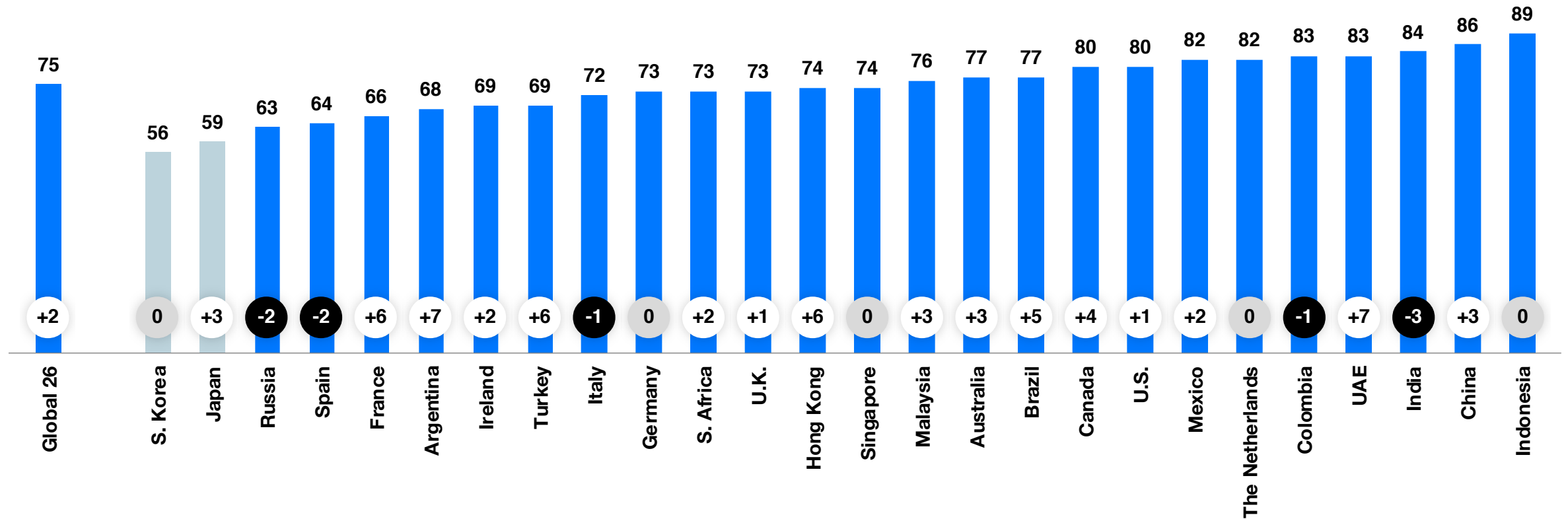




# STRONG RELATIONSHIP WITH MY EMPLOYER AROUND THE WORLD

Percent trust in “my employer”

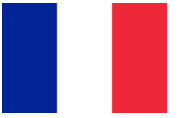
■ Distrust ■ Neutral ■ Trust  
● - 0 + Y-to-Y Change



2019 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 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. Question asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population employees, 26-market average.

# 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

**58%**

**56%**

**53%**

Multinational employees

**59%**

**62%**

**61%**

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, France.



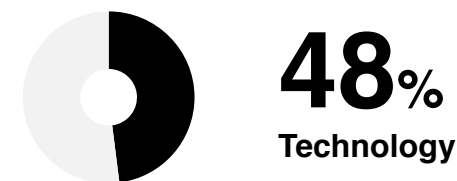
# EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

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**



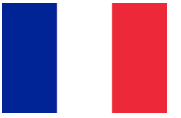
Employees see business as trustworthy source on:




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 and multinational employees, France. 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, France, among those who are an employee, but do not run their own business (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.

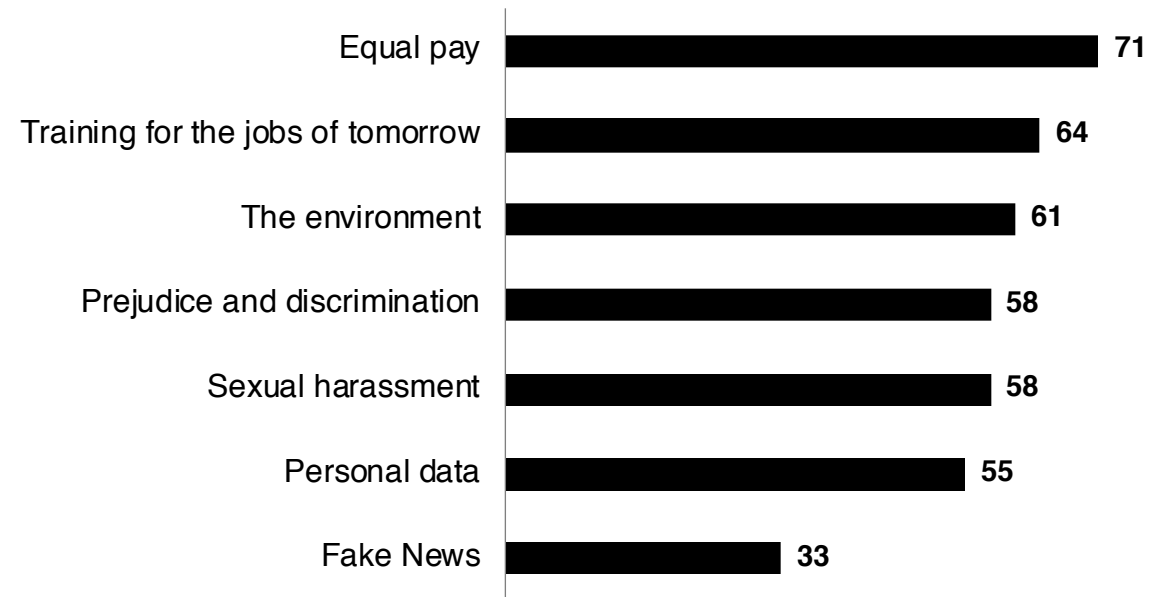
# STRONG EXPECTATIONS CLEARLY EXPRESSED



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

**80%**  **21pts**

## Percent who agree CEOs can create positive change in:





# TRUSTED EMPLOYERS LEAD ON CHANGE

Top five communications topics that are most effective in increasing employer trust, as determined by discrete choice logit analysis

Relative importance in building employer trust

(A coefficient of 2 or higher is significant)

<b>Societal Impact</b> The organization's contributions for the betterment of society	<b>3.78</b>
<b>Values</b> The organization's values	<b>3.24</b>
<b>The Future</b> The organization's vision for the future	<b>3.12</b>
<b>Purpose</b> The organization's mission and purpose	<b>2.85</b>
<b>Operations</b> Operational decisions, including decisions that may affect my job	<b>2.62</b>

2019 Edelman Trust Barometer. EMP\_COM. Good communication within an organization is important. In looking through the list of topics below, please indicate which ones the organization you work for does a good job communicating about to its employees? 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. Reported coefficients are marginal effects calculated using a discrete choice logit model which allows us to calculate the trust effect of good communication about each topic, while holding other variables constant.

# TRUST COMES WITH HIGH EXPECTATIONS TOWARD “MY EMPLOYER”

Percent of employees who expect each from a prospective employer

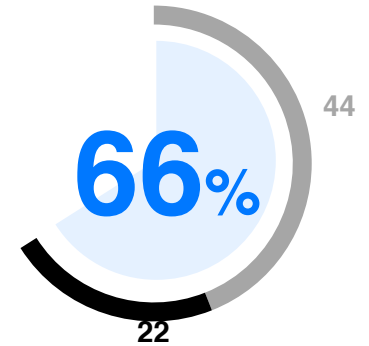
**Strong expectation**  
You would have to **pay me a lot more** to work for an organization that does not offer this

**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, France. 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.

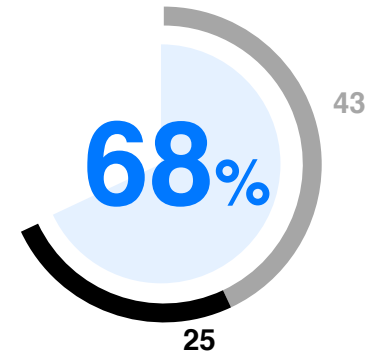
## Shared Action

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



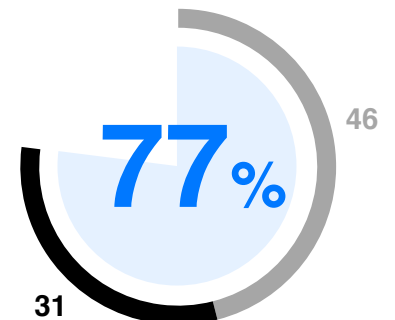
## Personal Empowerment

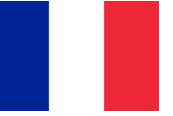
I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



## Job Opportunity

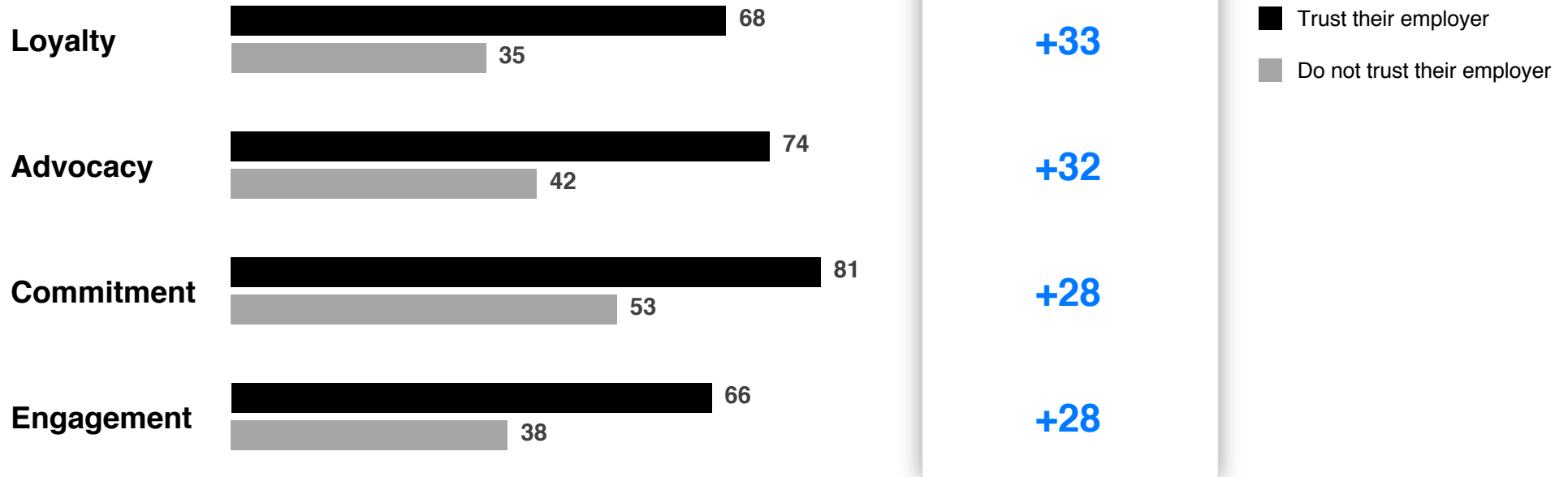
My employer offers wage growth, training, career growth and work which I find interesting & fulfilling





# 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, France, 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, France. 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.

# TRUST AT WORK: THE NEW EMPLOYER-EMPLOYEE CONTRACT

## 1. Lead Change

- Be aspirational
- Address concerns about the personal impact of change
- Train the workforce of the future

## 2. Empower Employees

- Give them a voice
- Create opportunities for shared action
- Empower them with information

## 3. Start Locally

- Solve problems at home
- Improve societal conditions in the local communities in which you operate

## 4. CEO Leadership

- Live your values
- Engage directly
- Be visible and show a personal commitment, inside and outside the organization





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