



2019 EDELMAN TRUST BAROMETER

South Korea

#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)

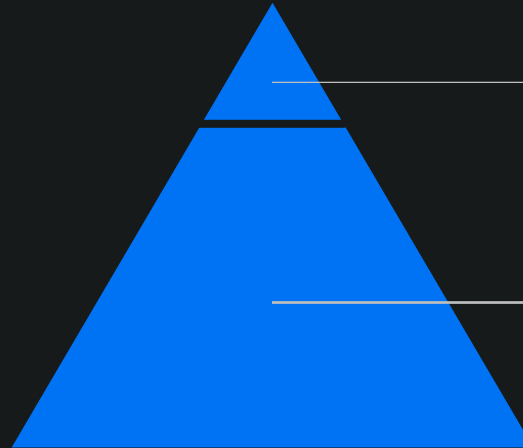
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

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



TRUST IN RETROSPECT



2001 Rising Influence of NGOs	2002 Fall of the Celebrity CEO	2003 Earned Media More Credible Than Advertising	2004 U.S. Companies in Europe Suffer Trust Discount	2005 Trust Shifts from “Authorities” to Peers	2006 A “Person Like Me” Emerges as Credible Spokesperson	2007 Business More Trusted Than Government and Media	2008 Young Influencers Have More Trust in Business	2009 Business Must Partner with Government to Regain Trust	
									2019 Trust at Work
2010 Trust is Now an Essential Line of Business	2011 Rise of Authority Figures	2012 Fall of Government	2013 Crisis of Leadership	2014 Business to Lead the Debate for Change	2015 Trust is Essential to Innovation	2016 Growing Inequality of Trust	2017 Trust in Crisis	2018 The Battle for Truth	

DISTRUST CONTINUES

Trust Index

Global Trust Index increases 3 pts to neutral

15 of 26 markets are distrusters, down 3 from 2018

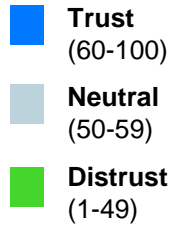
2019 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. General population, 26-market global average.

▲ 2018 General Population

49	Global 26
74	China
71	Indonesia
68	India
66	UAE
58	Singapore
54	Mexico
54	The Netherlands
53	Malaysia
49	Canada
47	Argentina
47	Colombia
47	Spain
46	Turkey
45	Hong Kong
44	Brazil
44	S. Korea
43	Italy
43	U.S.
41	Germany
40	Australia
40	France
39	U.K.
38	Ireland
38	S. Africa
37	Japan
36	Russia

▲ 2019 General Population

52	Global 26
79	China
73	Indonesia
72	India
71	UAE
62	Singapore
59	Malaysia
58	Mexico
56	Canada
55	Hong Kong
54	The Netherlands
52	Colombia
49	U.S.
48	Australia
46	Argentina
46	Brazil
46	Italy
46	S. Korea
45	S. Africa
45	Turkey
44	France
44	Germany
43	U.K.
42	Ireland
40	Spain
39	Japan
29	Russia



Biggest changes in

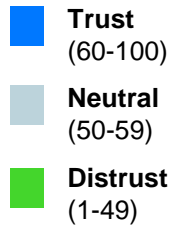
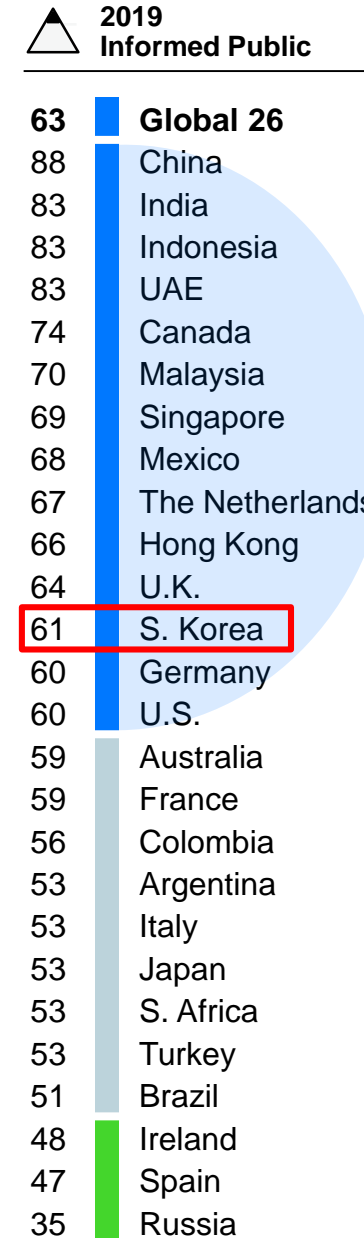
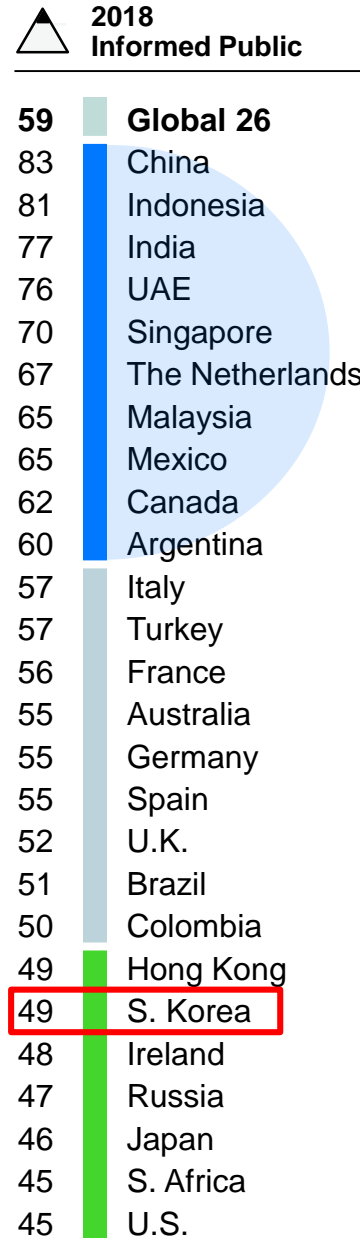


TRUST RISES FOR INFORMED PUBLIC

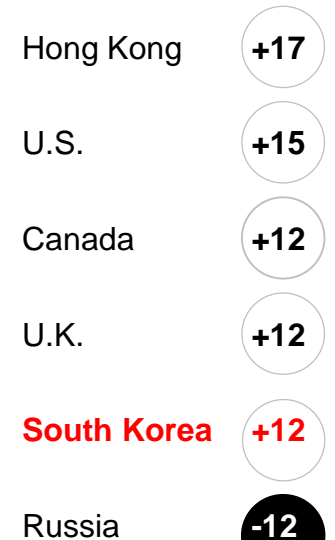
Trust Index

A 4-point increase in the global Trust Index

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, 26-market global average.



Biggest changes in



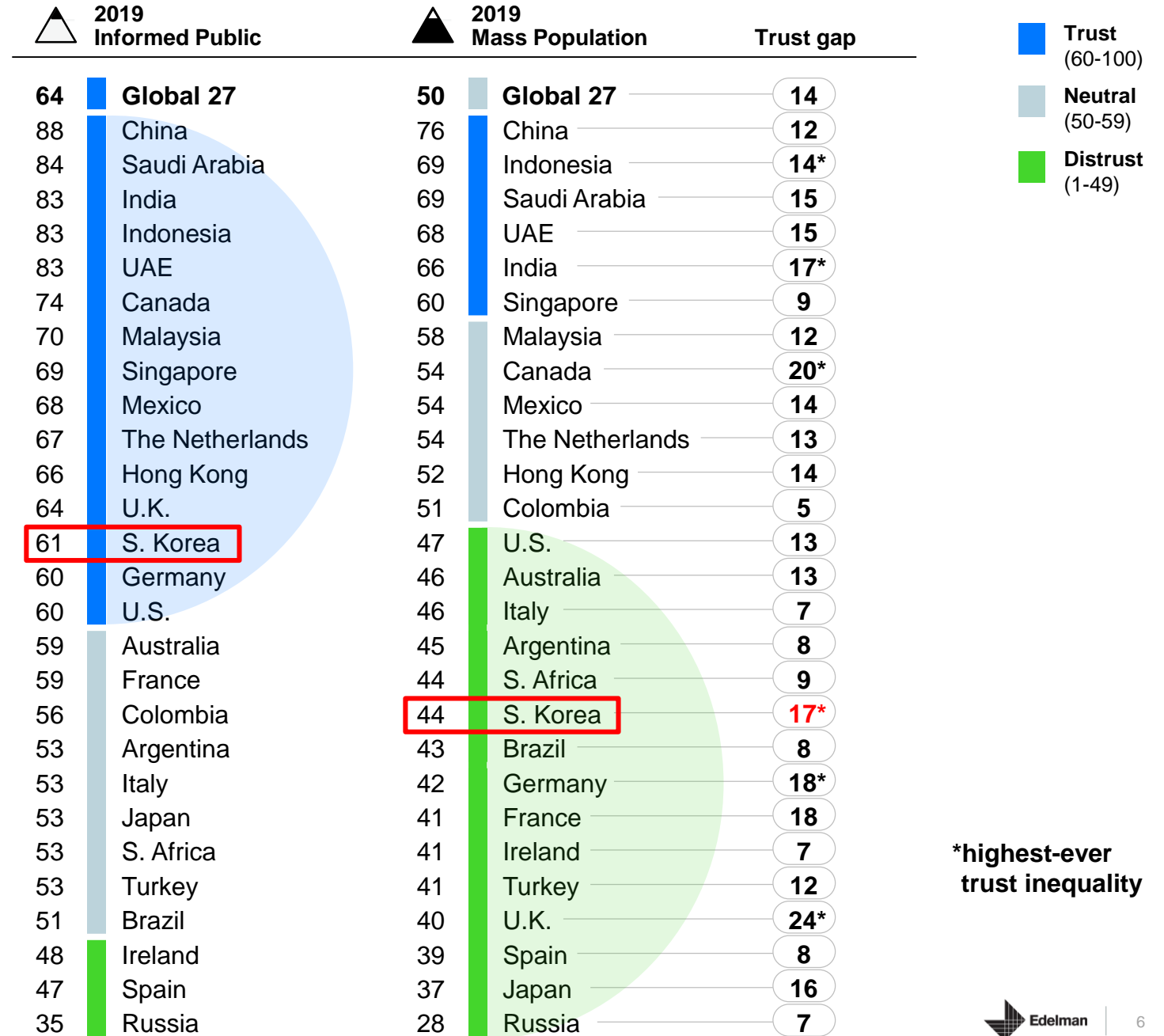
A WORLD OUT OF BALANCE

Trust Index

Mass population 14 points less trusting

18 markets with double-digit trust gaps

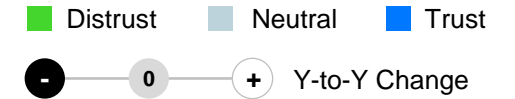
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Divided by Trust

TRUST RISES IN SOUTH KOREA; BUSINESS, GOVERNMENT, MEDIA ALL DISTRUSTED



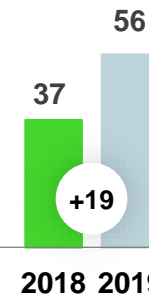
Percent trust

 Informed public

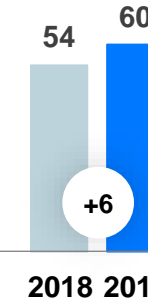
NGO



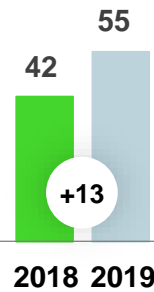
Business



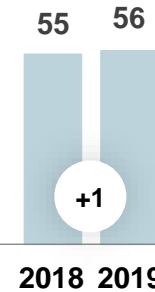
Government



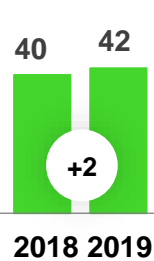
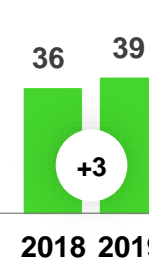
Media



 General population



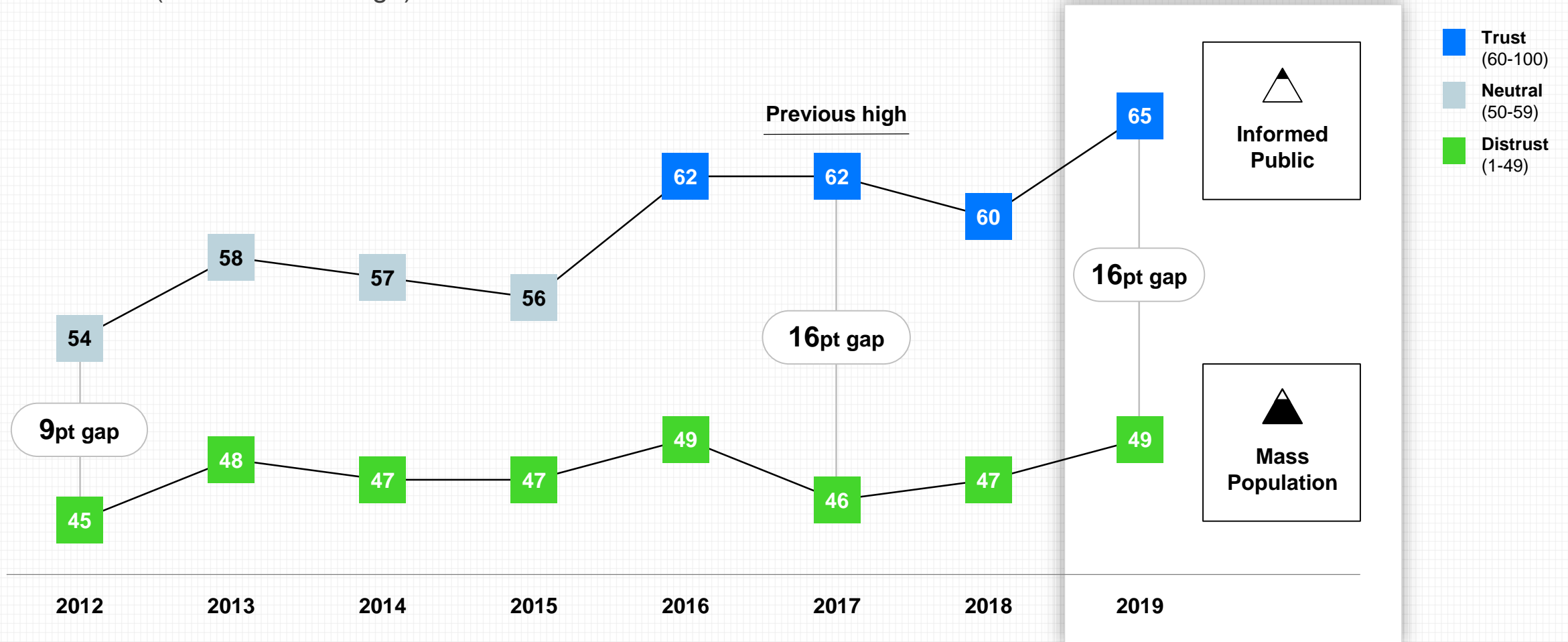
Business, government and media still distrustful





TRUST INEQUALITY RETURNS TO RECORD HIGHS

Trust Index (23-market average)

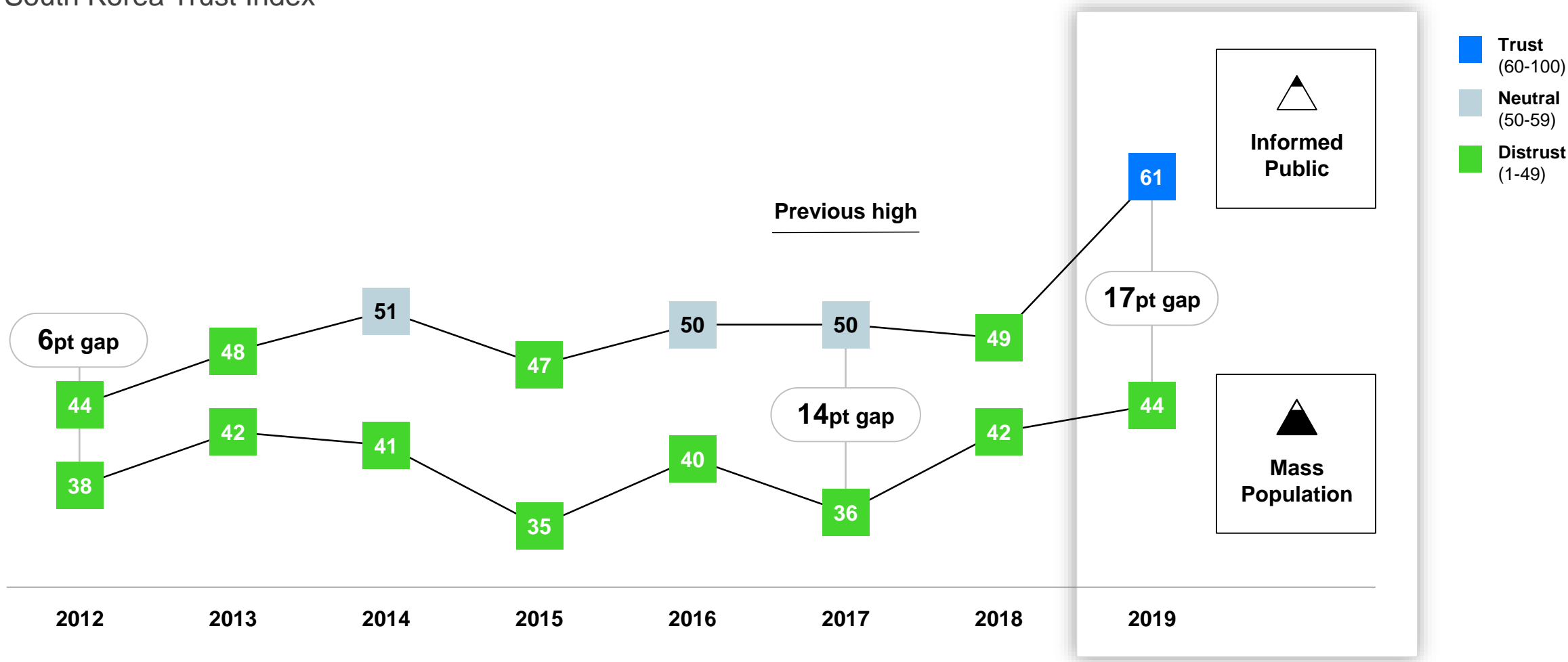


2019 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you "do not 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.



TRUST INEQUALITY AT RECORD HIGH IN SOUTH KOREA

South Korea Trust Index



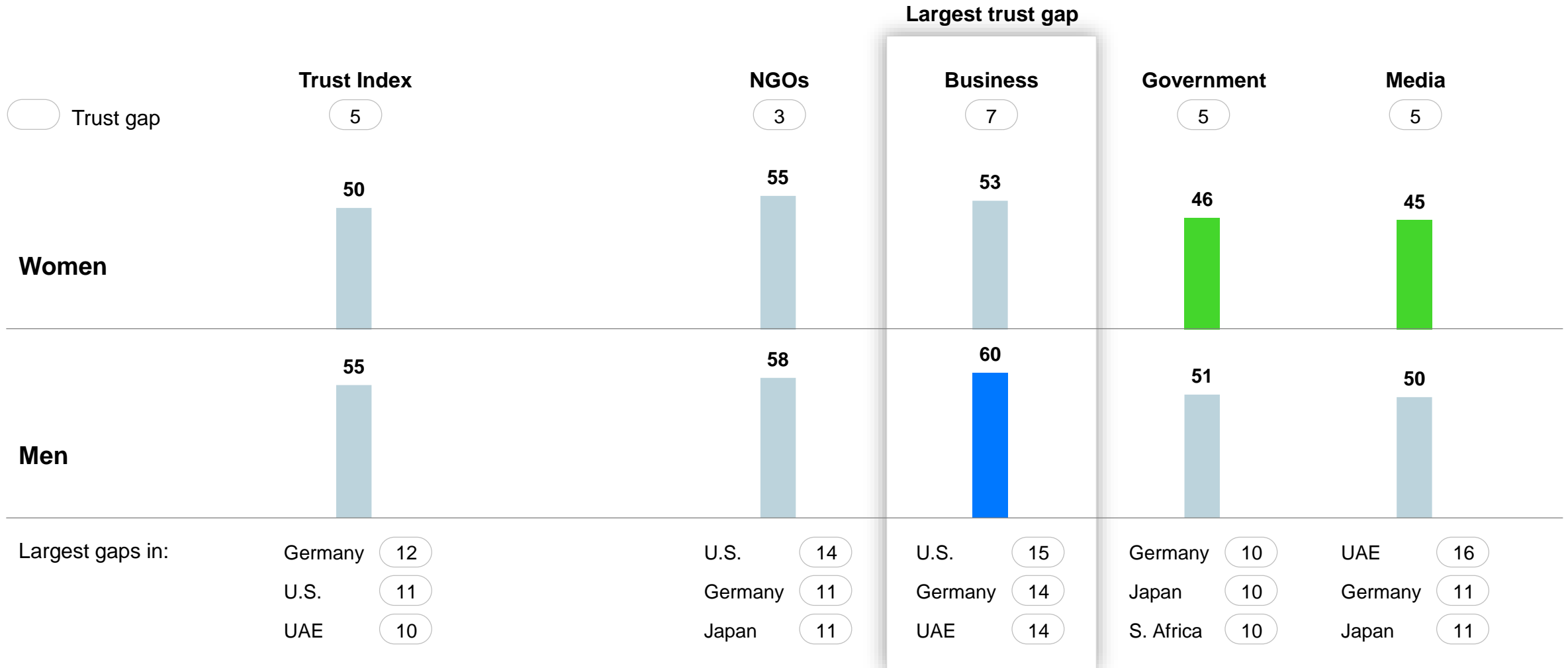
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DIVIDED ALONG GENDER LINES

Percent trust



■ Distrust ■ Neutral ■ Trust

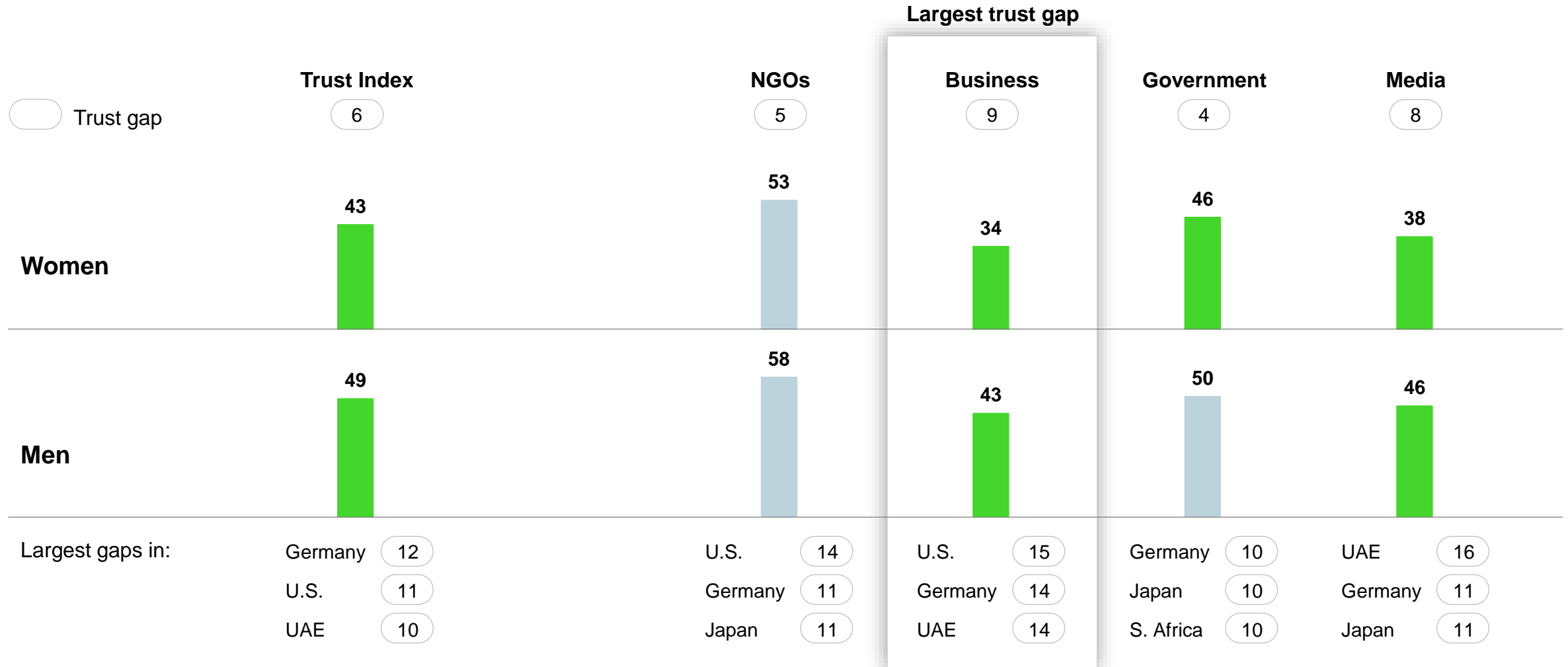


SOUTH KOREA DIVIDED ALONG GENDER LINES

Percent trust



■ Distrust ■ Neutral ■ Trust





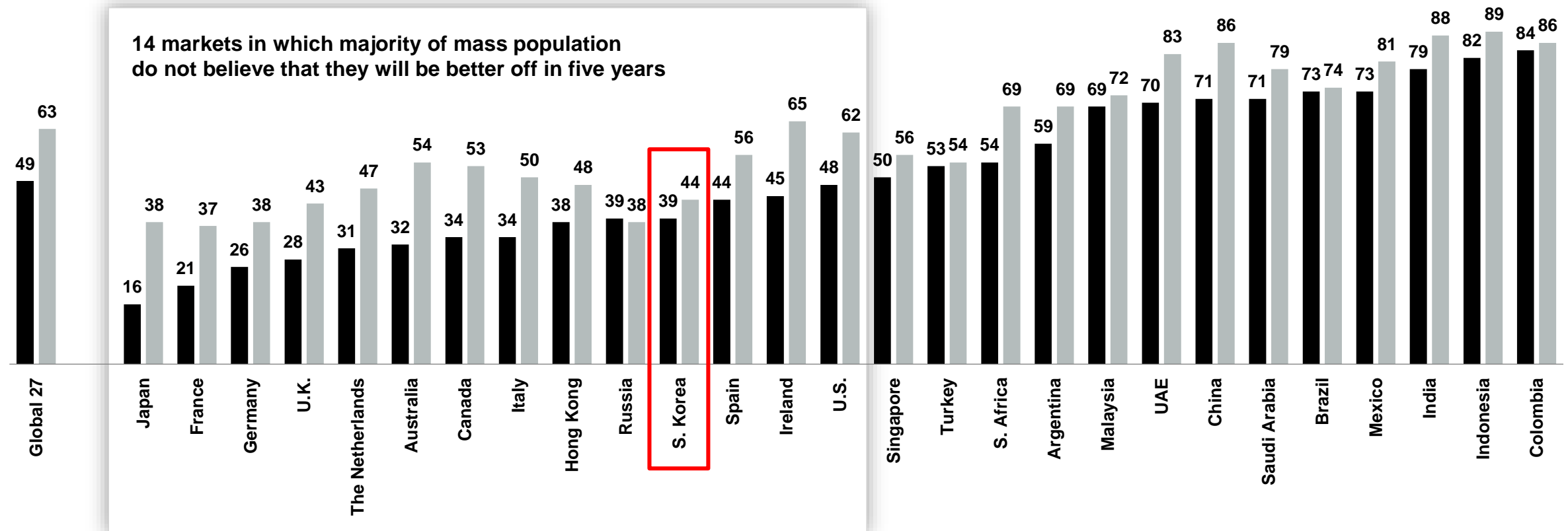
An Urgent Desire for Change



DEVELOPED WORLD PESSIMISTIC ABOUT FUTURE

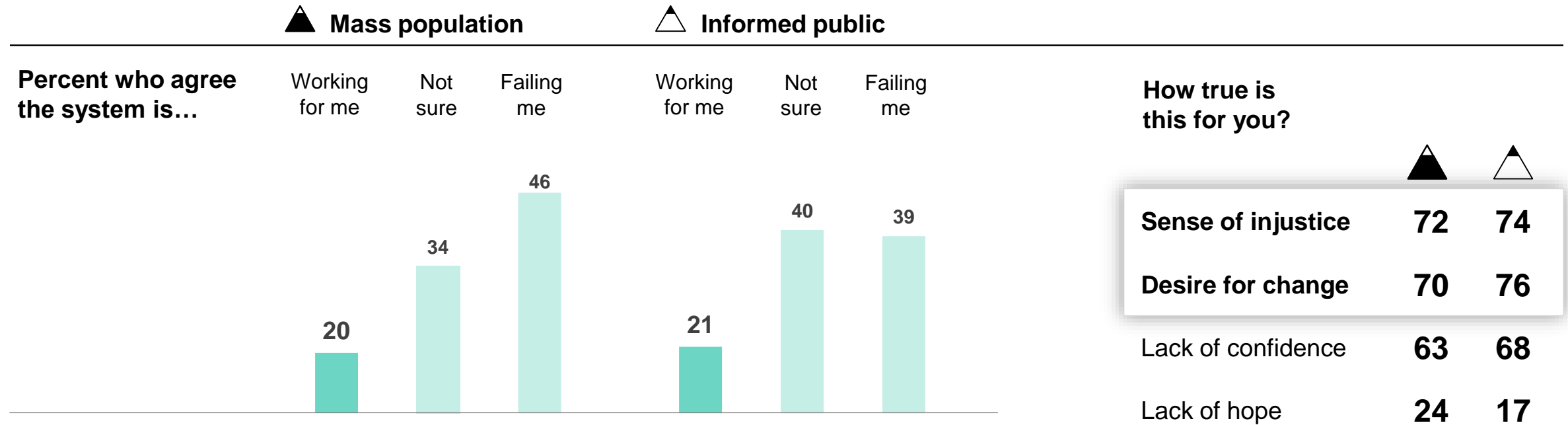
Percent who believe they and their families will be better off in five years' time

■ Mass population ■ Informed public





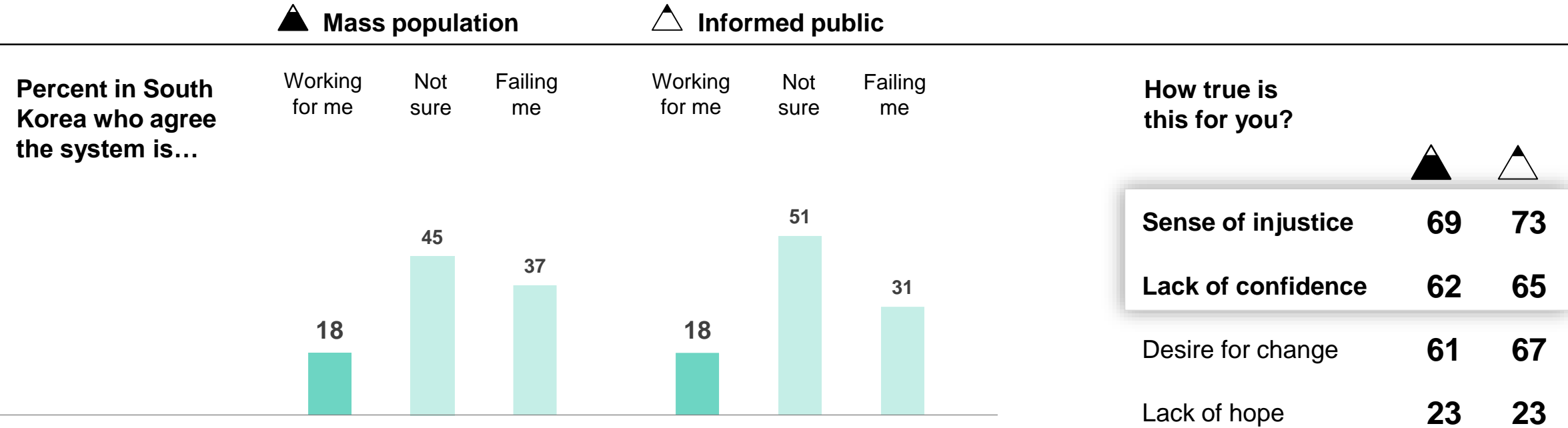
ONLY 1 IN 5 BELIEVE THE SYSTEM IS WORKING FOR THEM



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].



LESS THAN 1 IN 5 BELIEVE THE SYSTEM IS WORKING FOR THEM



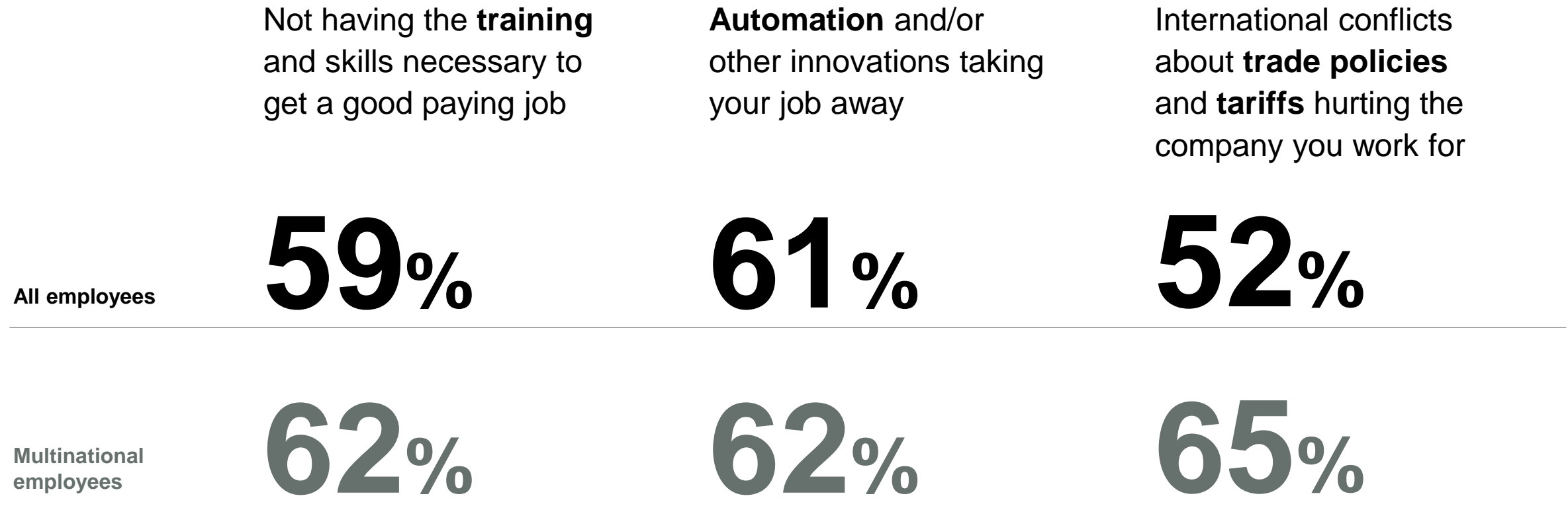
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WIDESPREAD FEARS OF JOB LOSS IN SOUTH KOREA

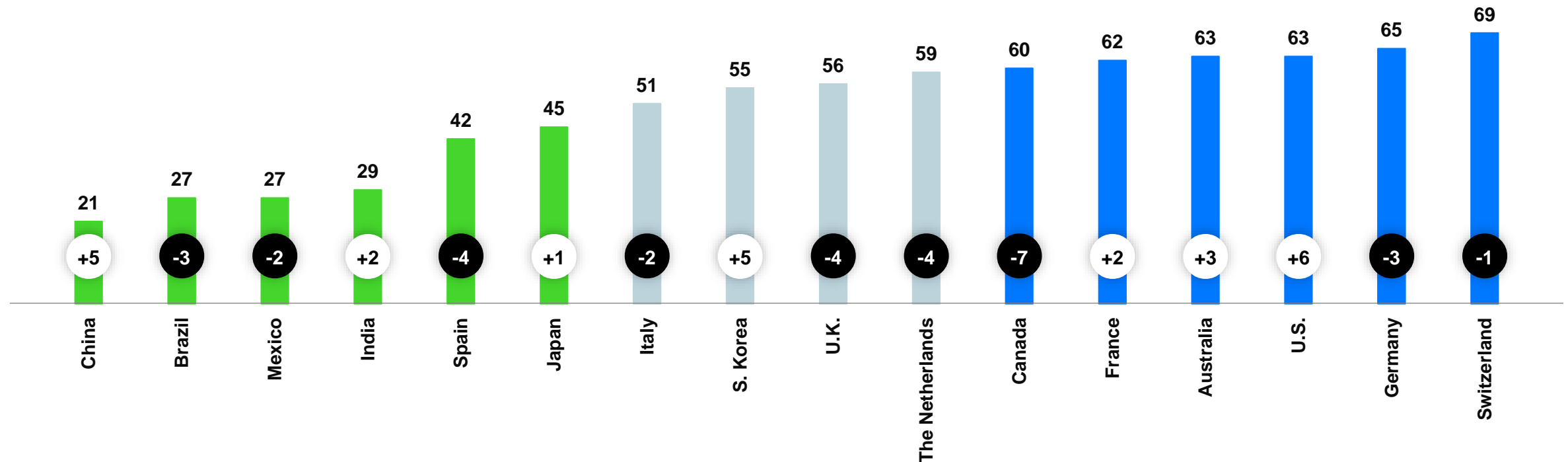
Percent of South Korean employees who worry about job loss due to each issue



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, S. Korea.

SOUTH KOREAN TRUST RISES FOR 7 OF 16 COUNTRY BRANDS

Percent in South Korea who trust companies headquartered in each market



2019 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. 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. Markets shown to half of the sample. General population, S. Korea.

THEY'RE TAKING CHANGE INTO THEIR OWN HANDS



**“Yellow Vests” demonstrate
for economic justice**



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



**Salesforce employees protest
work for U.S. border agency**



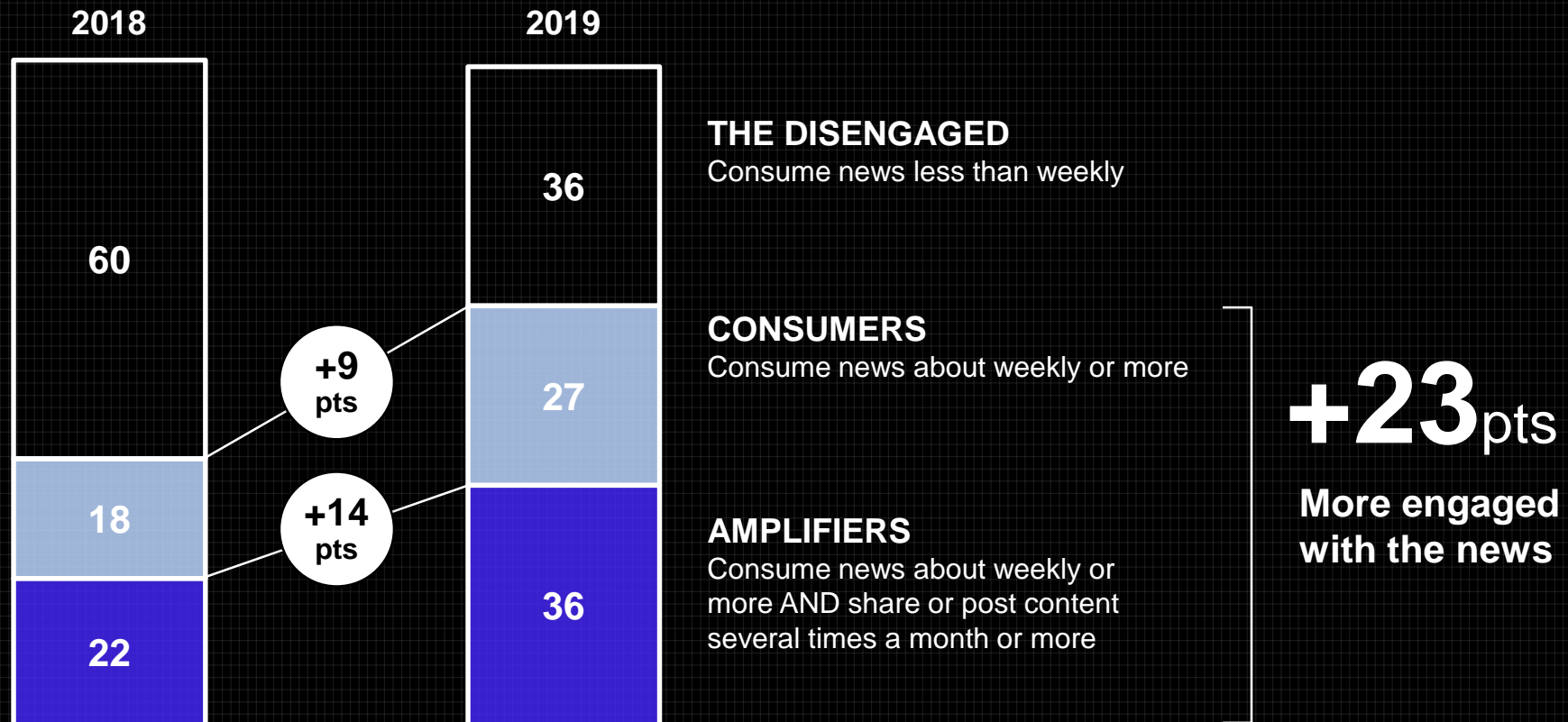
**Making
Change Happen**



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

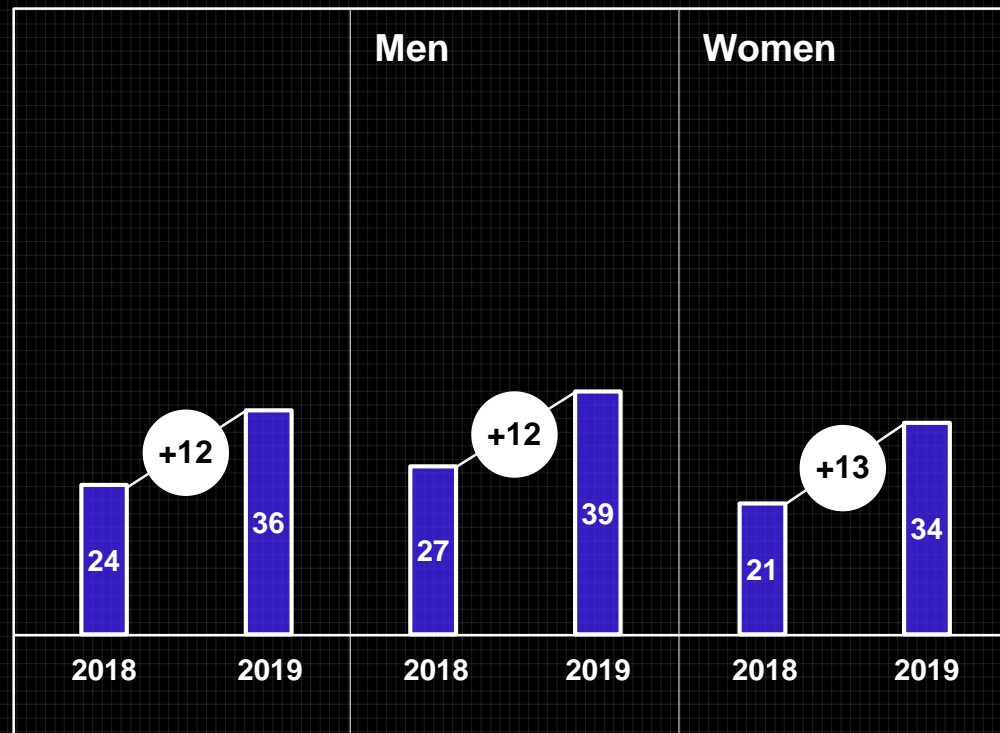
MORE WOMEN THAN MEN BECOME AMPLIFIERS

Percent of amplifiers in each segment

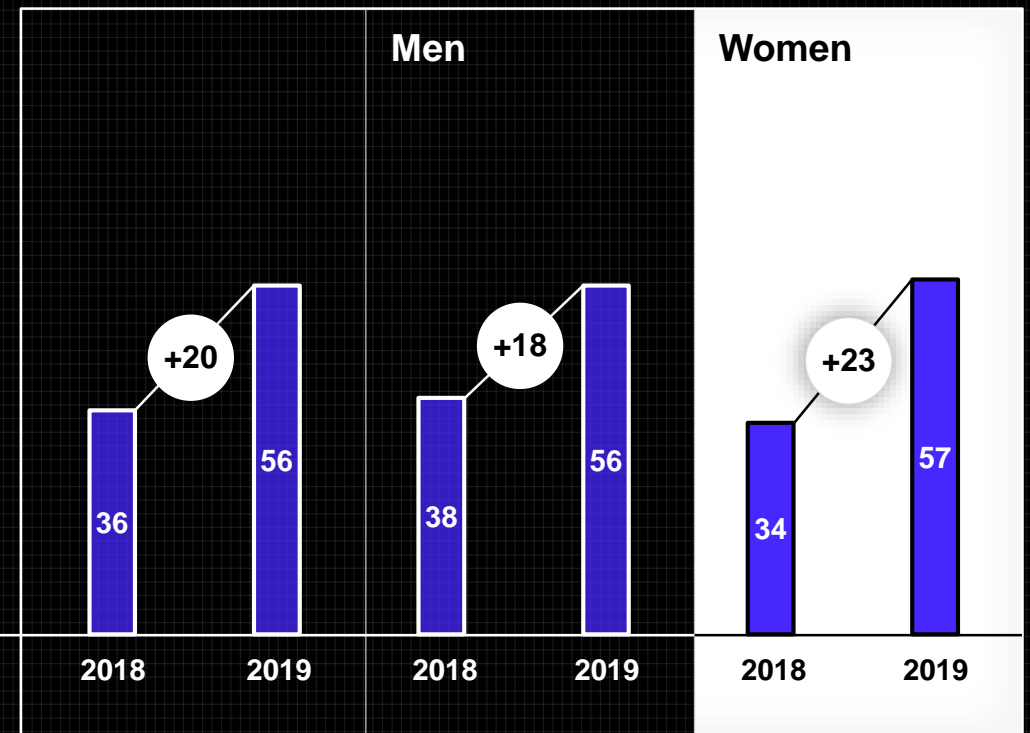


- 0 + Y-to-Y Change

▲ Mass population



▲ Informed public

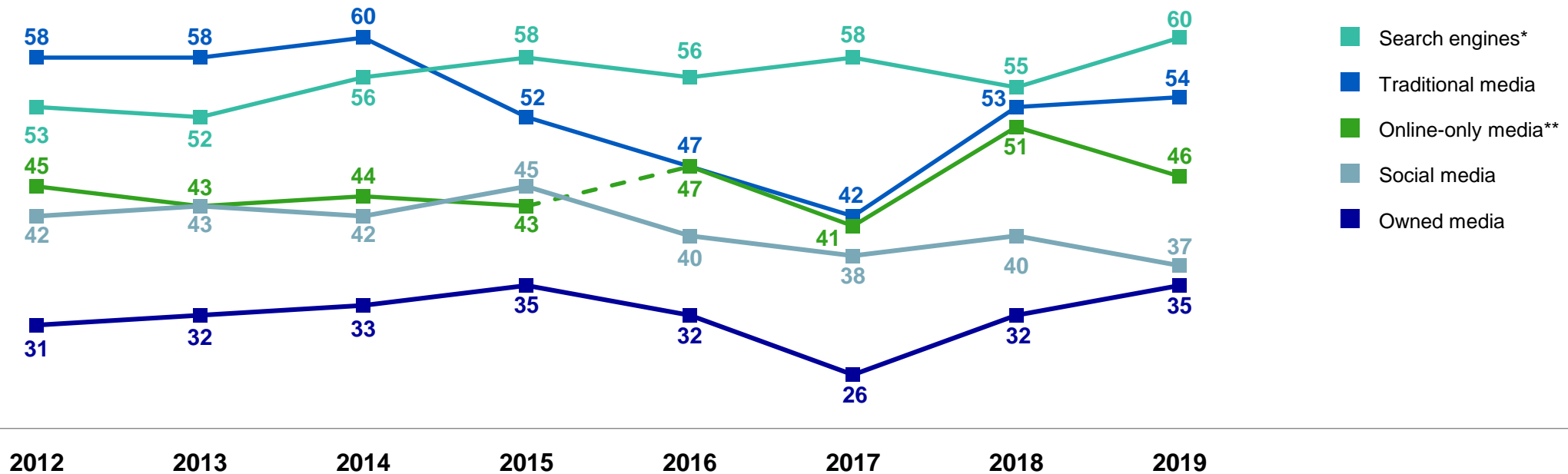


2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. Mass population and informed public, 26-market average,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



SEARCH MOST TRUSTED IN SOUTH KOREA

Percent in South Korea who trust 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, S. Korea.

*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.”

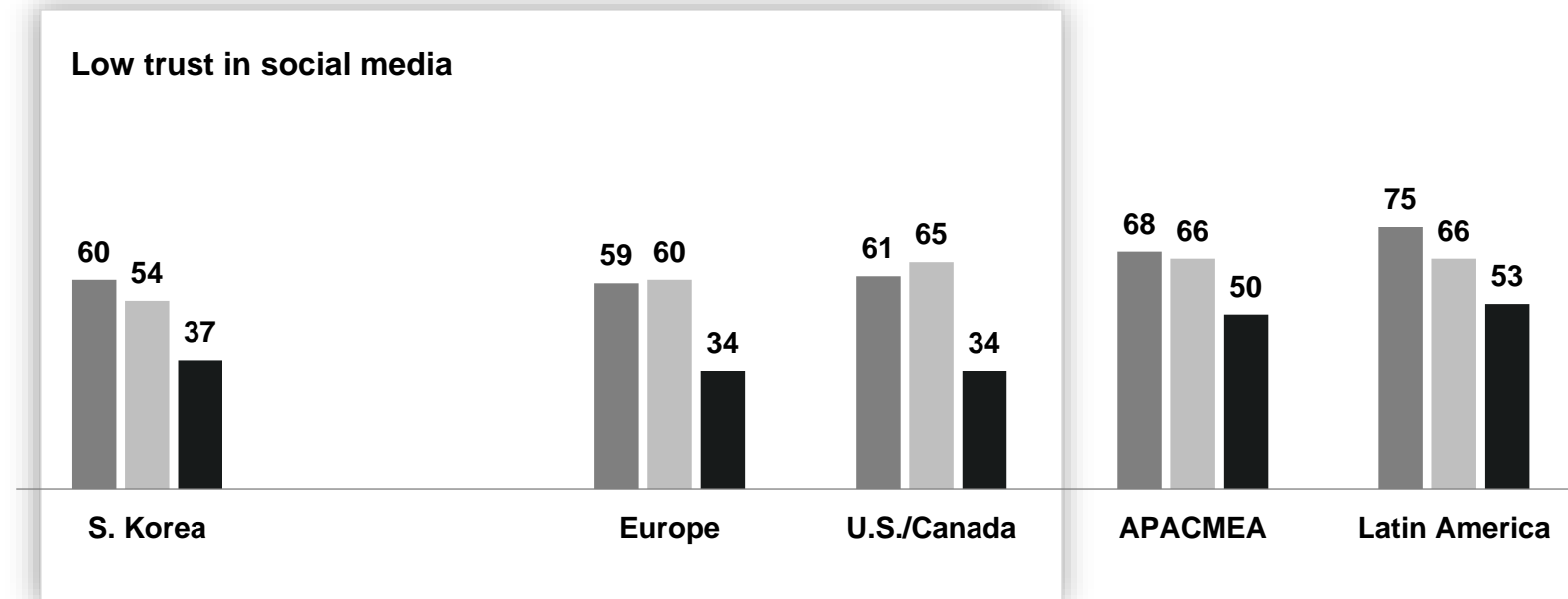


SOUTH KOREA LOOKING FOR RELIABLE SOURCES

Percent in South Korea who trust each source of news

■ Search ■ Traditional media ■ Social media

Low trust in social media



72%

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

2019 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement 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, S. Korea. 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 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 half of the sample. General population, S. Korea and by region.

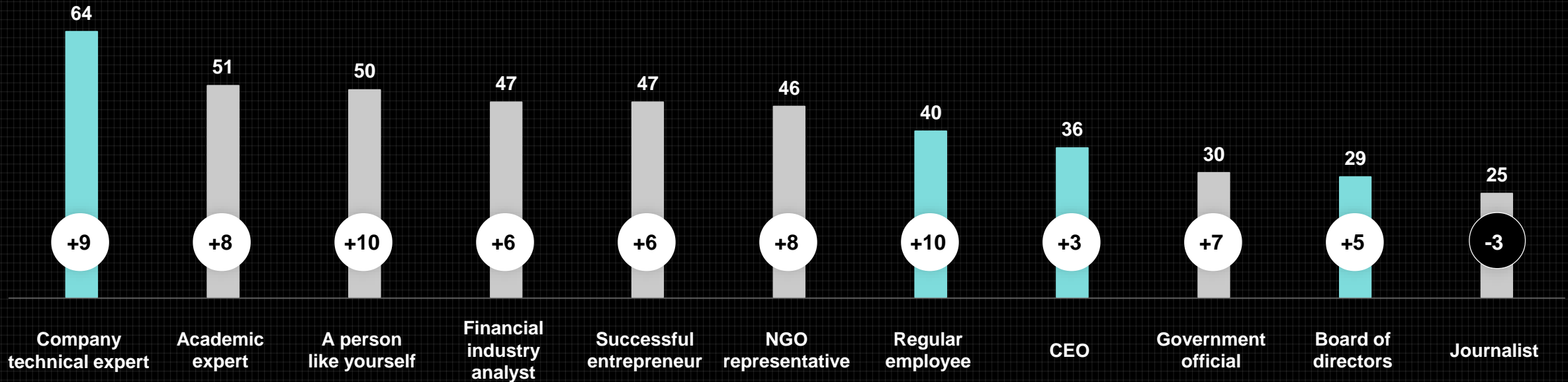


ACTIVATE EMPLOYEE VOICES

Percent in South Korea who rate each source as very/extremely credible

■ Company voices

○ - 0 + Y-to-Y Change



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, S. Korea.

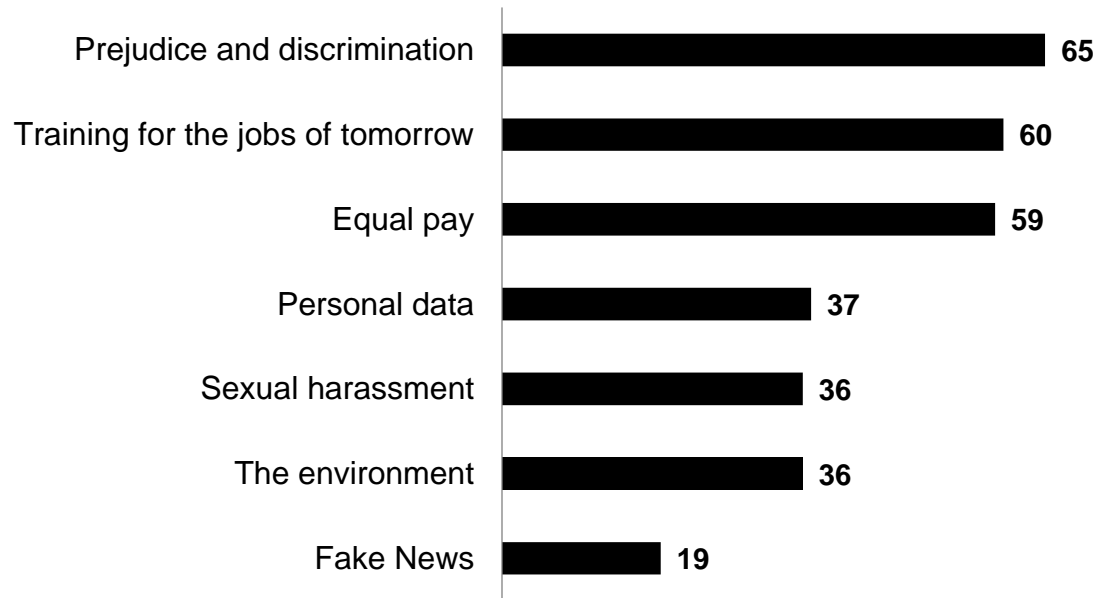
SOUTH KOREA LOOKING FOR LEADERSHIP FROM CEOS



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

76%

Percent who agree CEOs can create positive change in:



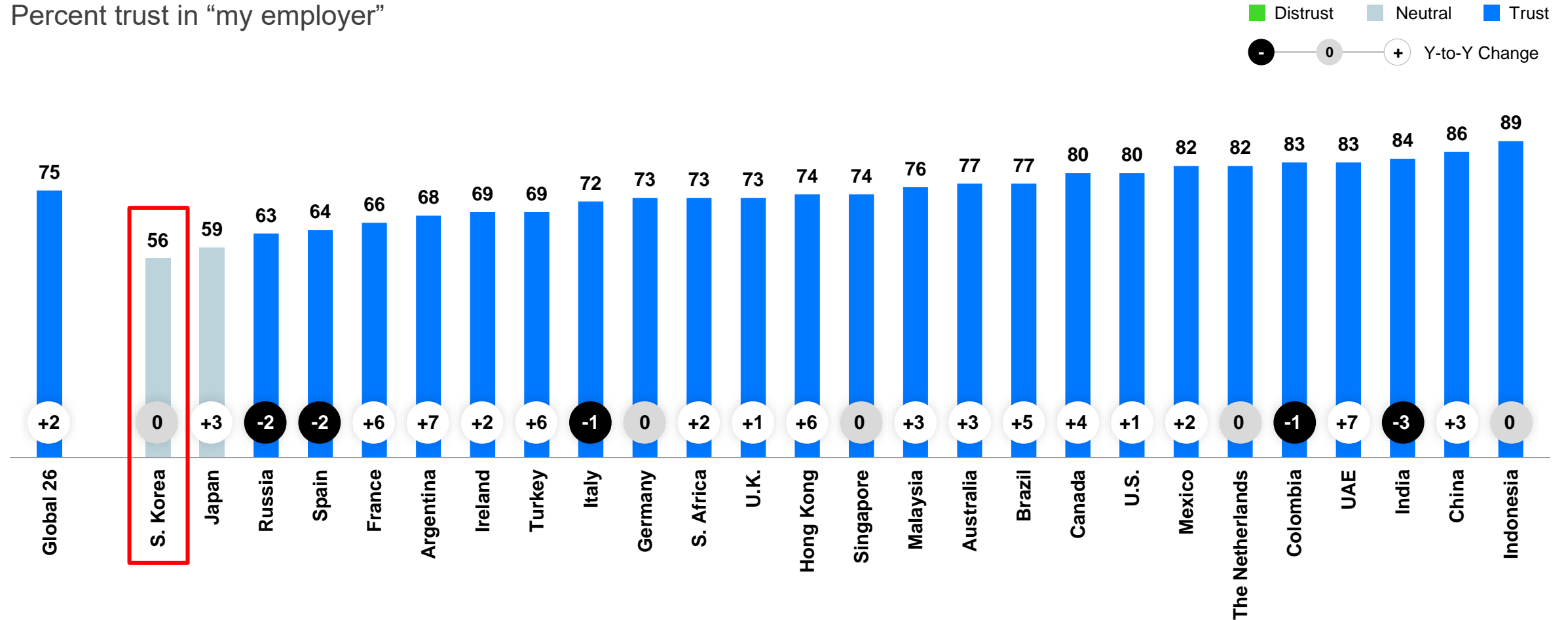


**My Employer:
A Trusted Partner
for Change**



STRONG RELATIONSHIP WITH MY EMPLOYER AROUND THE WORLD

Percent trust in “my employer”



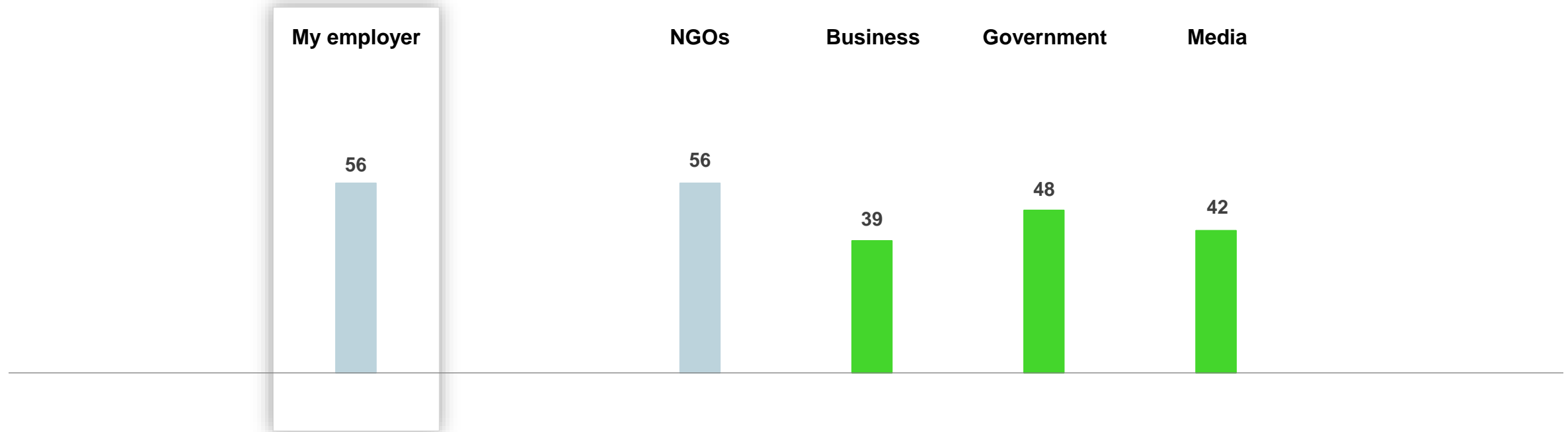
2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 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.

MY EMPLOYER AND NGOs MOST-TRUSTED RELATIONSHIPS IN SOUTH KOREA

Percent trust



■ Distrust ■ Neutral ■ Trust



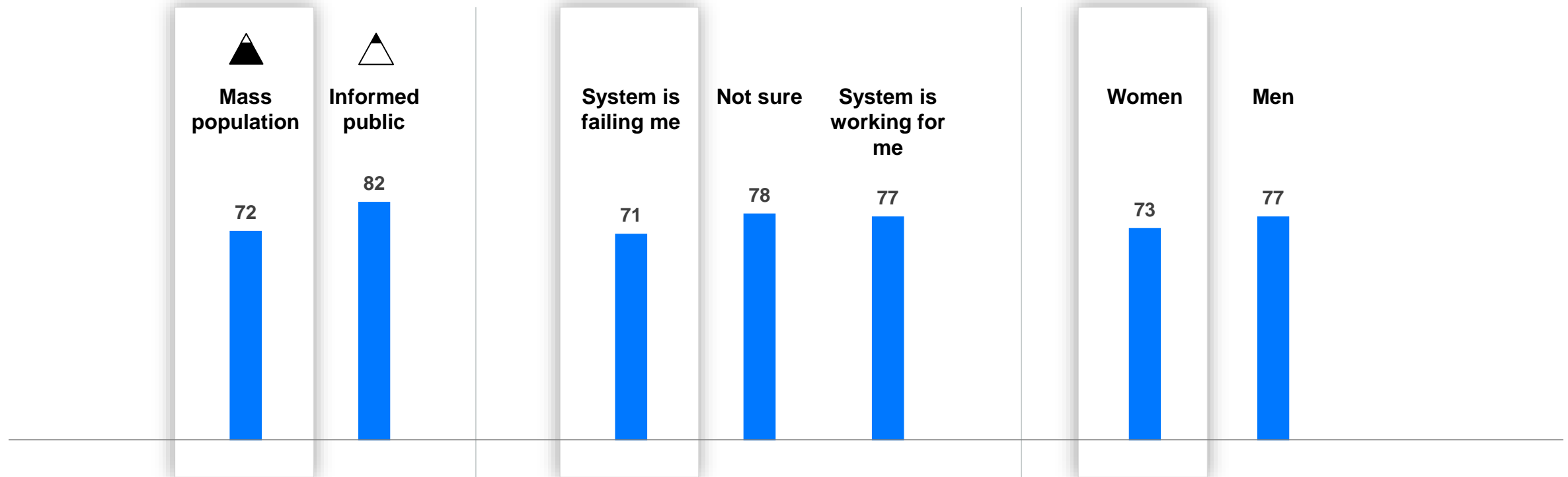
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EMPLOYERS TRUSTED EVEN BY THE DISENFRANCHISED

Percent trust in “my employer”

■ Distrust ■ Neutral ■ Trust



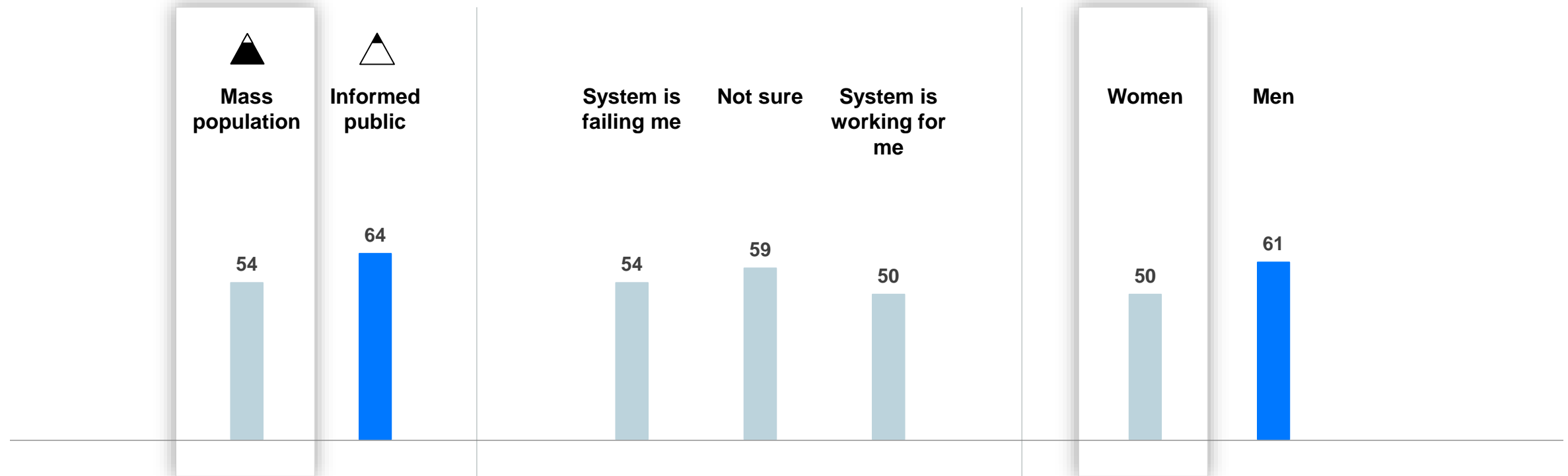
2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 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, 27-market average, by gender, and “system failing” scale. For details on how the “system failing” measure was calculated, please refer to the Technical Appendix.



EMPLOYERS MUST EARN TRUST AMONG THE DISENFRANCHISED

Percent trust in “my employer”

■ Distrust ■ Neutral ■ Trust



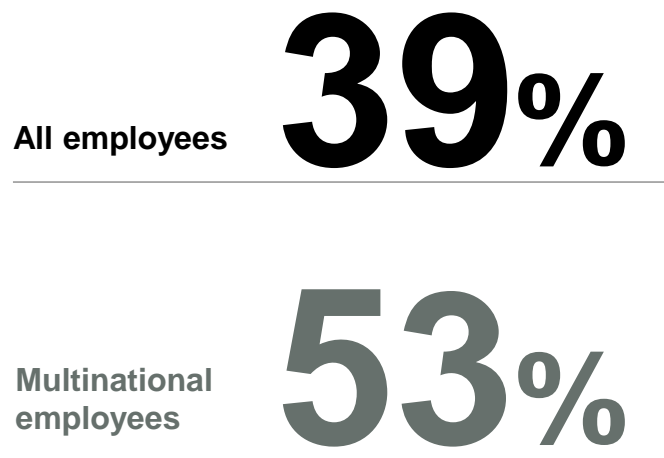
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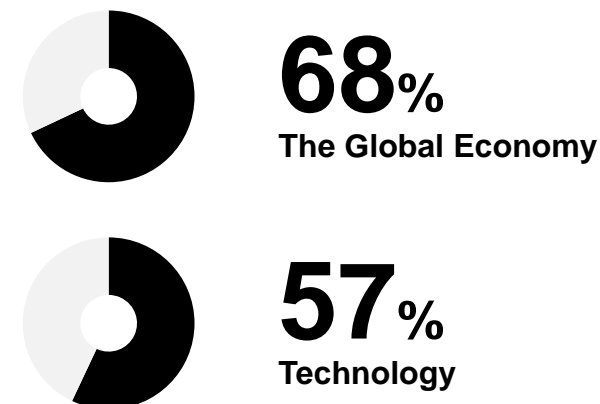
EMPLOYERS TRUSTED TO PROVIDE CERTAINTY, ESPECIALLY AMONG EMPLOYEES OF MULTINATIONALS

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**



South Korean 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, S. Korea. 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, S. Korea, 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.

A black and white photograph of a business meeting. In the foreground, a man in a dark suit and tie is seated at a table, looking down with his hand near his chin in a thoughtful pose. Behind him, several other people, mostly women, are seated in a row, also looking down or towards the left. The background is a plain, light-colored wall. A decorative graphic of many thin, blue, wavy lines flows from the left side of the image, curving around the text and extending towards the right. The overall mood is professional and contemplative.

Trust at Work

EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

Percent of employees who expect each
from a prospective employer

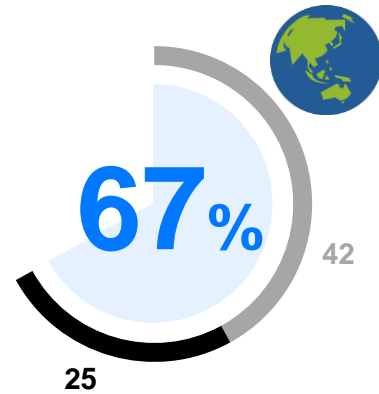
■ **Strong expectation**
You would have to **pay me a lot more** to work for an organization that does not offer this

■ **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, 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.

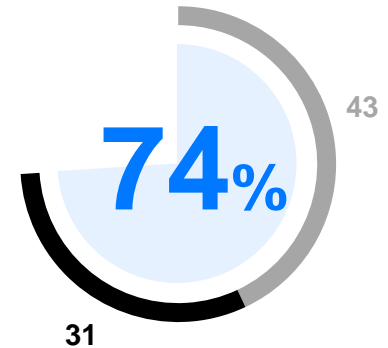
Shared Action

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



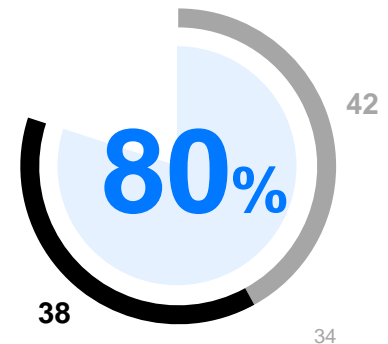
Personal Empowerment

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



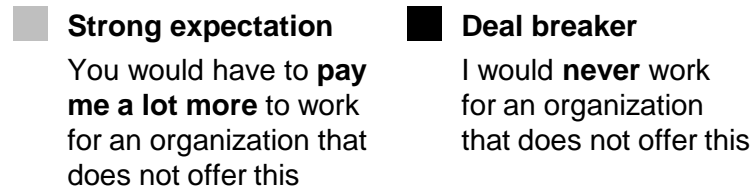
Job Opportunity

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



SOUTH KOREAN EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

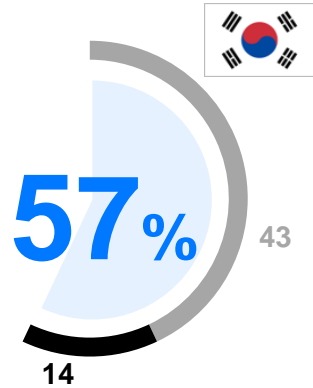
Percent of South Korean employees who expect each from a prospective employer



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, S. Korea. 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.

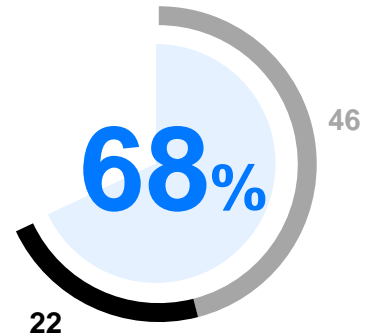
Shared Action

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



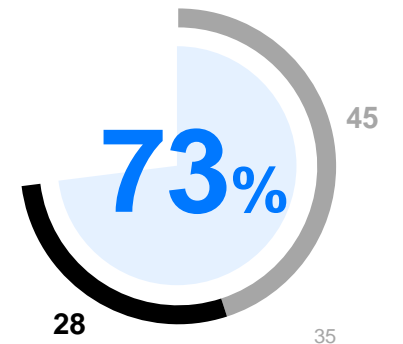
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TRUST CEMENTS THE EMPLOYER-EMPLOYEE PARTNERSHIP

Percent of South Korean 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, S. Korea, 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, S. Korea. 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

77%

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”

69%

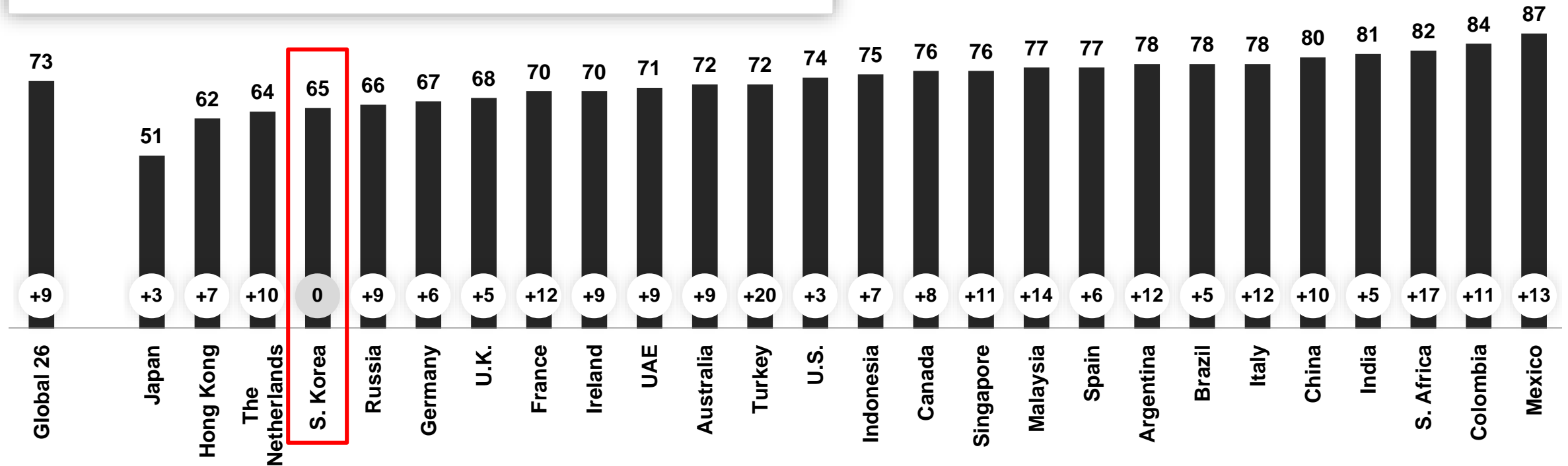
COMPANIES CAN IMPROVE SOCIETY—AND ALSO DO WELL



Percent who agree

“A company can take specific actions that both increase profits and improve the economic and social conditions in the communities where it operates”

● — 0 — ● Y-to-Y Change





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



Thank You

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