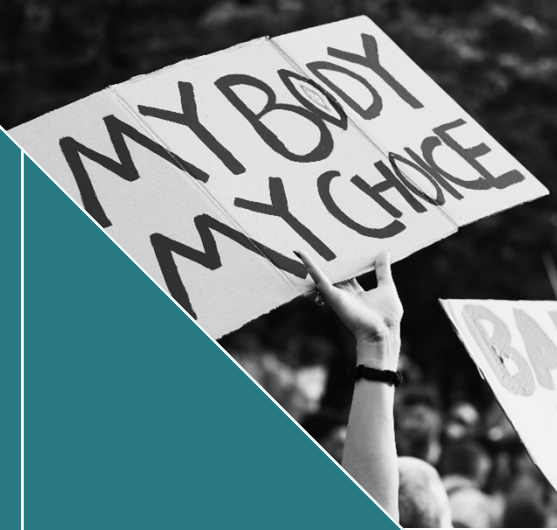


2023 Edelman Trust Barometer

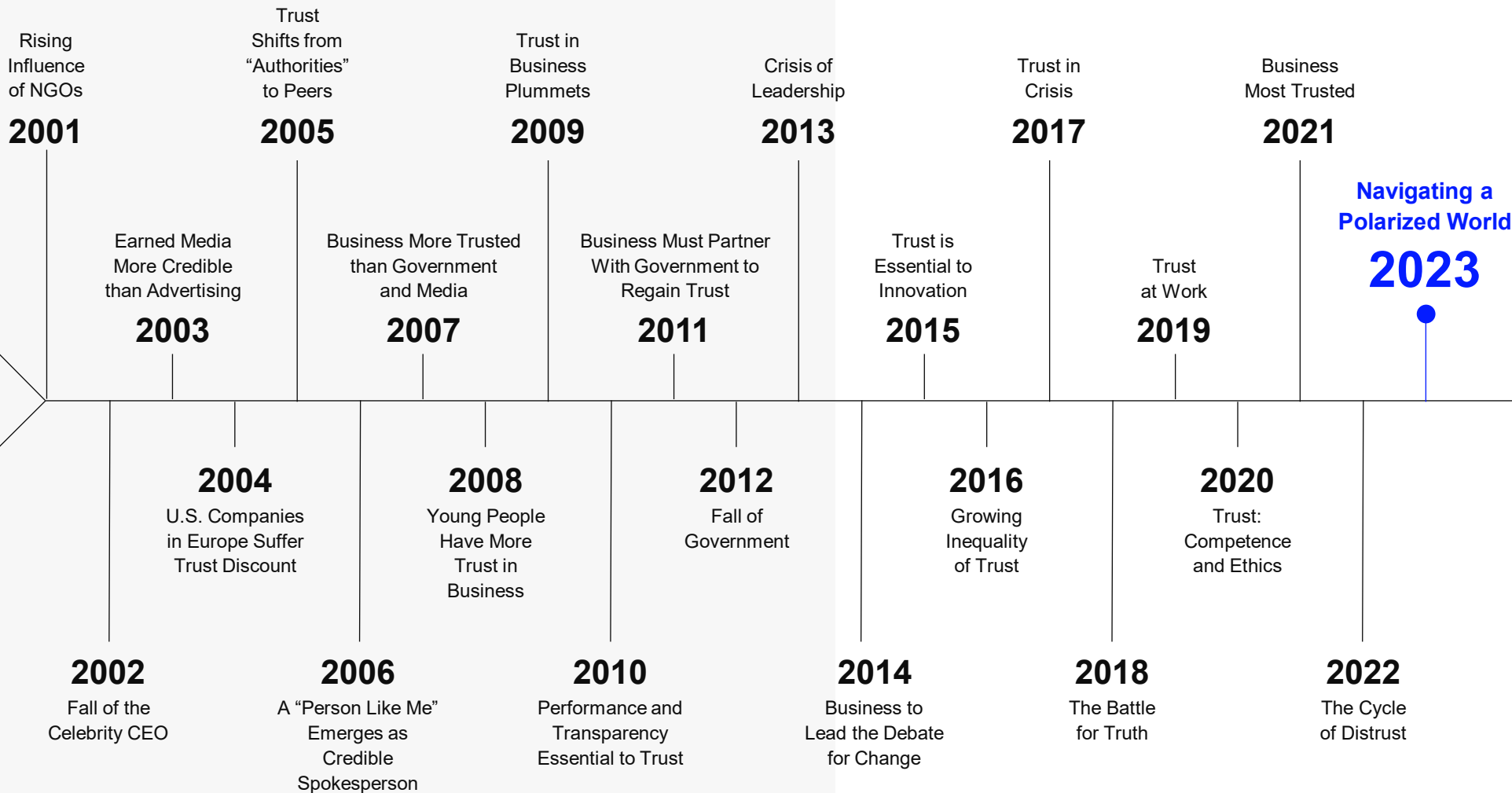
Special Report: Trust and Health

Trust in the Age of COVID

Mérieux Foundation
Vaccine Acceptance Event Series
1 November 2023



23 Years of Trust



2023 Edelman Trust Barometer Special Report: Trust and Health

Methodology

Annual online survey in its 2nd year

Fieldwork conducted: Mar 2 – Mar 13, 2023

13

Countries

12,785

Respondents

1,000+/-

Respondents per country**

Brazil	China	Germany	Japan	*Nigeria	S. Korea
Canada	France	India	Mexico	S. Africa	UK
					U.S.

**The sample size varies by country from 805 to 1,002.

12-market global data margin of error: General population +/- 1.1 percentage points (n=12,785)

Country-specific data margin of error: General population +/- 4.1 to 4.6 percentage points (varies by country based on sample size, n=805 to n=1,002)

Margin of error is calculated at the 99% confidence level

Global averages

These vary based on the number of countries surveyed each year:

GLOBAL 12

*Nigeria will not be included in the average until the respondent sample composition stabilizes year over year

GLOBAL 11 Excludes China

The sensitive nature of the question prevented this data from being collected in China

Statistical significance

 **Significant change**

All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level

For more details on global averages and country-specific methodology, please refer to the Technical Appendix



The Shifting Landscape of Health



Economic Fears

Inflation tops the list of societal factors that are negatively affecting people's health. Cost and lack of affordability have also increased as the greatest barriers to better health.

Polarization and its Drivers

A sense of the system being unfair, distrust in media, and societal fears were all top drivers of polarization in the January 2023 Trust Barometer. The present report shows similar factors also lead to a lack of confidence in the health system.

The Dispersion of Authority

While medical professionals, national authorities, and health experts are still seen as trusted health information sources, friends and family have surged in influence.

Trust and the Empowered Patient

People are more engaged with health information and comparing findings across sources, and they want care that treats them like an equal partner.

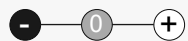
Economic Fears Create Health Crisis



Economic Optimism Collapses

Percent who say

GLOBAL 24



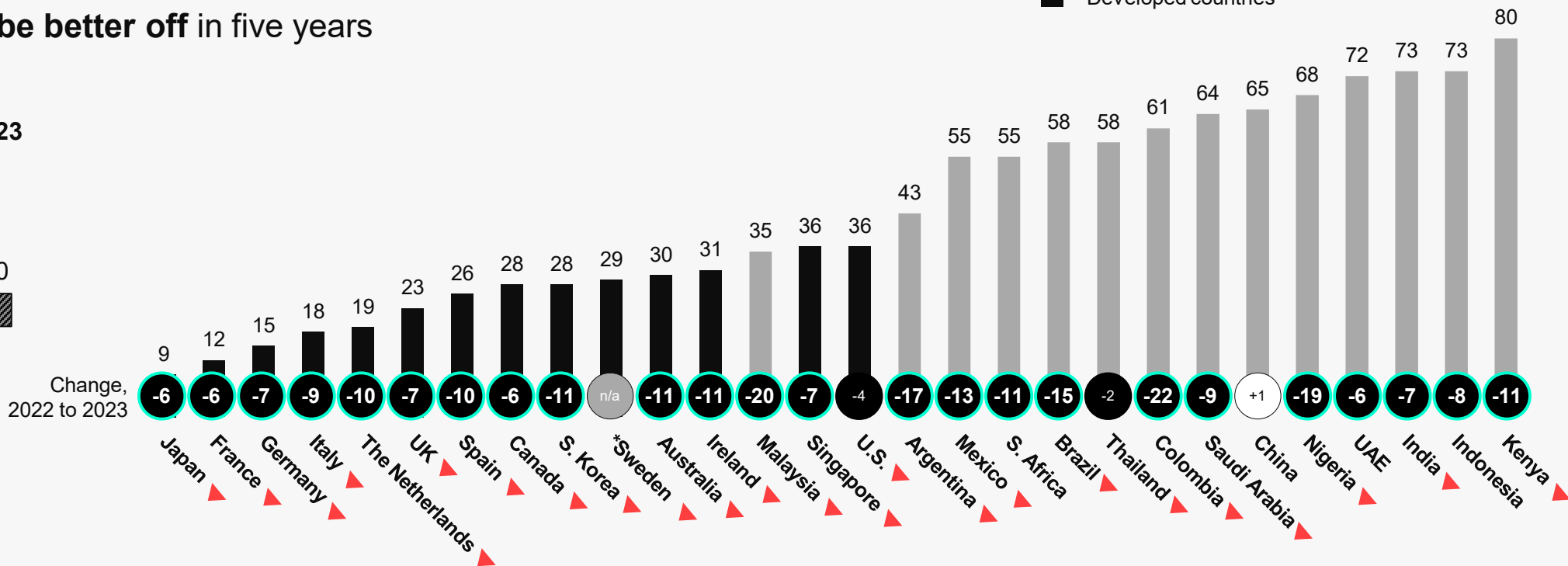
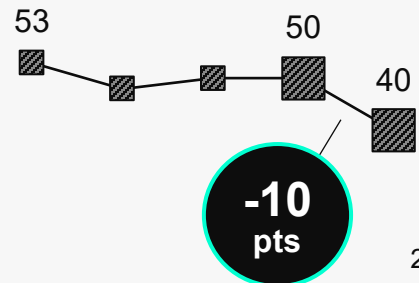
Significant change

24 of 28 countries at all-time lows

Developed countries

My family and I will be better off in five years

2019 2023



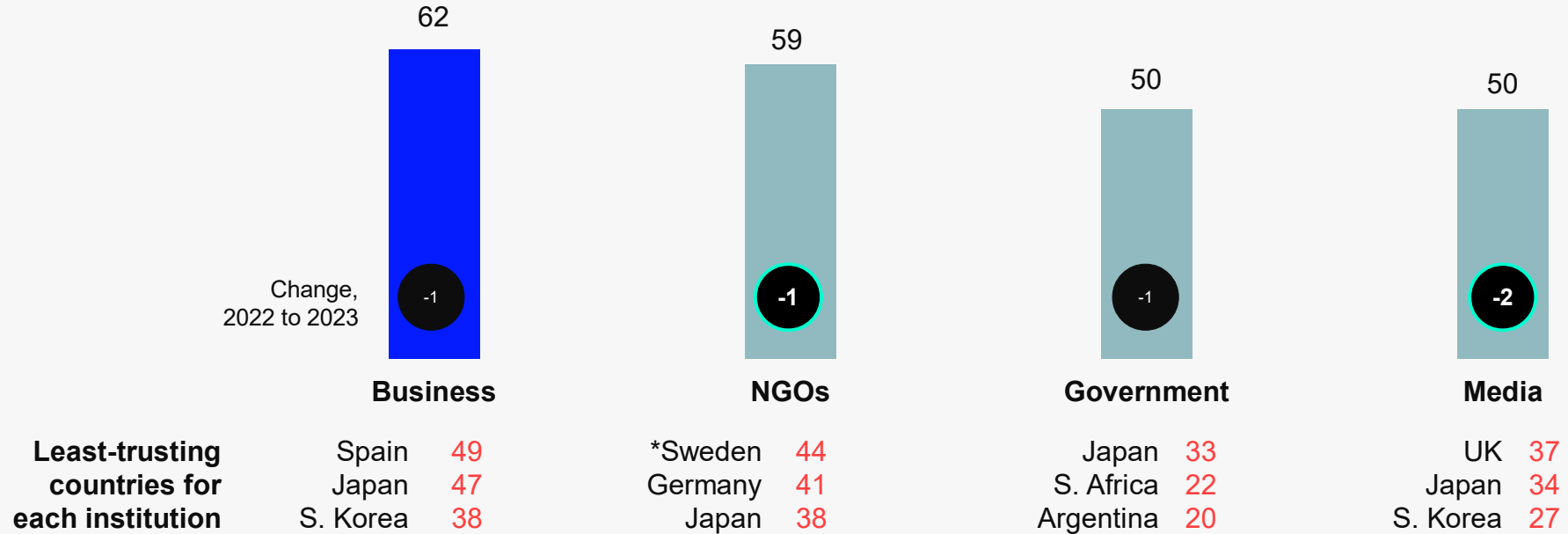
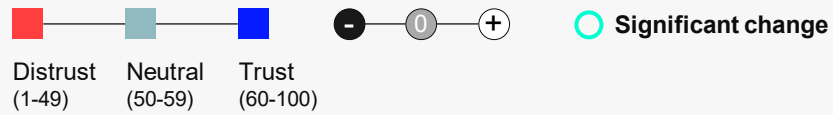
2023 Edelman Trust Barometer. CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. General population, 24-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Business Only Trusted Institution

Percent trust

GLOBAL 26 excludes France



2023 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, 26-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Due to a translation inconsistency, the France data was removed from this slide. For more details contact the Trust Barometer research team.



Health Inequality: Low Income Far Less Likely to Report Good Health

Percent who say

GLOBAL 12

My overall health is **very good or better**

Low-income people 20pts less likely than high income to report very good health



Inflation Tops List of Societal Factors Making Us Sick

Percent who say

This issue **negatively impacts** my health (net**)


Top 8 of 13	GLOBAL 12	Brazil	Canada	China	France	Germany	India	Japan	Mexico	*Nigeria	S. Africa	S. Korea	UK	U.S.
		Inflation	77	85	75	79	72	68	78	68	79	90	88	85
Pandemic restrictions	75	84	70	82	67	67	76	73	78	77	84	86	69	65
Lack of trust	67	80	58	83	53	52	76	60	72	82	81	76	53	64
Pollution	67	76	57	81	58	52	81	54	75	80	77	79	53	58
Polarization	66	80	57	73	56	52	72	51	68	82	81	80	53	66
Climate change	65	71	56	79	59	48	78	61	71	70	71	78	48	57
Burnout	64	75	56	85	58	47	72	55	71	76	73	79	52	52
Misinformation	64	80	58	82	47	45	75	53	68	80	73	73	51	63

2023 Edelman Trust Barometer Special Report: Trust and Health. SOC_HEA. For each of the following, please indicate whether it has in some way negatively impacted your personal mental or physical health, the health of your relationships, and/or the livability of your community. Select all that apply for each. General population, 12-mkt avg. **Data shown is a net of codes 1-4; physical health, mental health, health of my relationships, livability of my community. *Nigeria is not included in the global average.

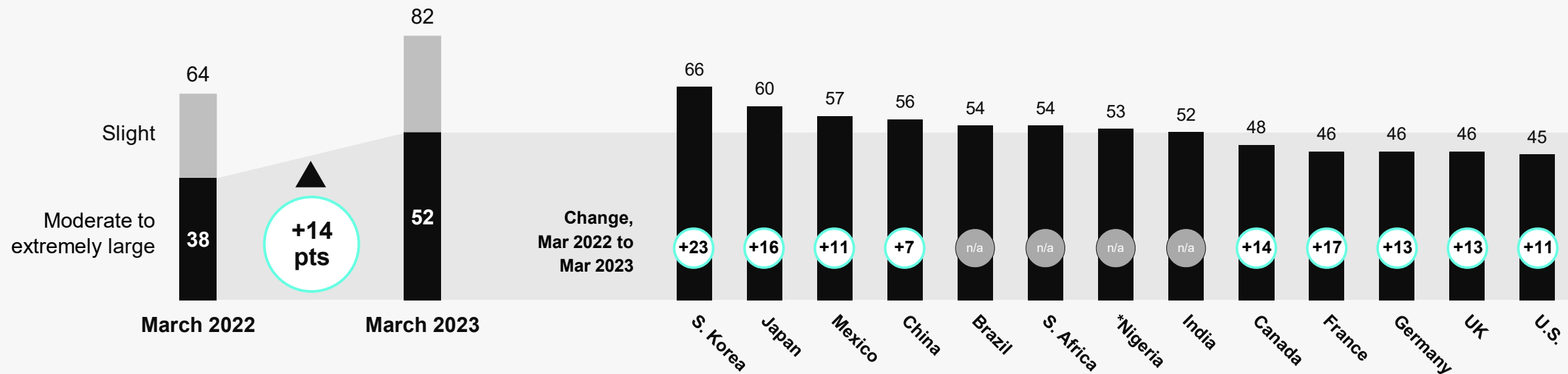


It's Now Much Harder to Take Care of My Health

Percent who say

GLOBAL 9  Significant change

There is a **gap** between how well I am taking care of my health vs how well I should be



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_GAP. Which of the following best describes the size of the gap between how well you currently are taking care of your health and how well you should ideally be taking care of your health? 5-point scale; code 2, slight gap; top 3 box, moderate/large/extremely large gap. General population, 9-mkt avg. Data shown is rebased to exclude those who selected "prefer not to answer." *Nigeria is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Biggest Barriers to Better Health: Cost and Information

Among the 82% who say there is a gap between how well they are currently taking care of their health vs how well they should be, percent who say

GLOBAL 9 Significant change

This plays a **large/very large** role in keeping me from taking better care of my health

Cost

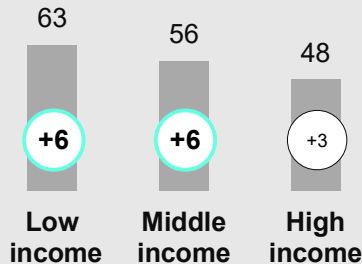
Healthy options cost too much
Cannot afford good healthcare
Cannot afford treatments

55%

+5 pts

Change, Mar 2022 to Mar 2023

15pt gap between those with high and low income



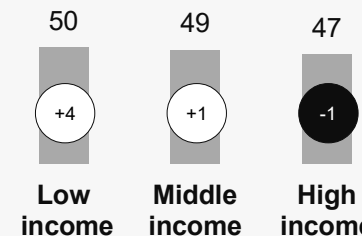
Information

Lack of information
Changing health recommendations
Contradictory expert advice

48%

+1 pt

Change, Mar 2022 to Mar 2023



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_BAR. How big a role does each of the following have in keeping you from closing the gap between how well you currently are taking care of your health and how well you should ideally be taking care of your health? 5-point scale; top 2 box, large role. Question asked of those who said there is a slight or larger gap (HEA_GAP/2-5). General population, 9-mkt avg., and by income. "Cost" is a net of attributes 1-3; "Information" is a net of attributes 4-6. Data shown on slide is rebased to exclude those who selected "prefer not to answer." Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Health Now Bigger Than Healthcare



My Health Is More Than My Physical Health

Percent who say

GLOBAL 12

When I think about being “healthy,” I think about...

Net dimensions:

Mental health **91%**

- Feeling happy
- Can manage negative emotions

Physical health **88%**

- Can do important activities
- No sickness or injury
- Can manage my physical health

Social health **83%**

- Have a person I can speak freely to
- People care about me
- Not discriminated against

Community livability **79%**

- Clean, safe, peaceful community
- Healthy planet

66%

say all four components are dimensions of my “health”

**Only 1% say being healthy is just about physical health*

2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_DEF. Think about what being healthy means to you. For each of the following, please indicate how big a consideration it is in whether you see yourself as being healthy. 3-pt scale; code 3, major consideration. General population, 12-mkt avg. “Mental health” is a net of codes 4-8; “physical health” is a net of codes 1-3; “social health” is a net of codes 9-12; “community livability” is a net of codes 13-15. The four-component score consists of respondents who selected at least one attribute from each of the four dimensions of health.

*Percent of respondents who selected an attribute(s) from the physical health dimension only.

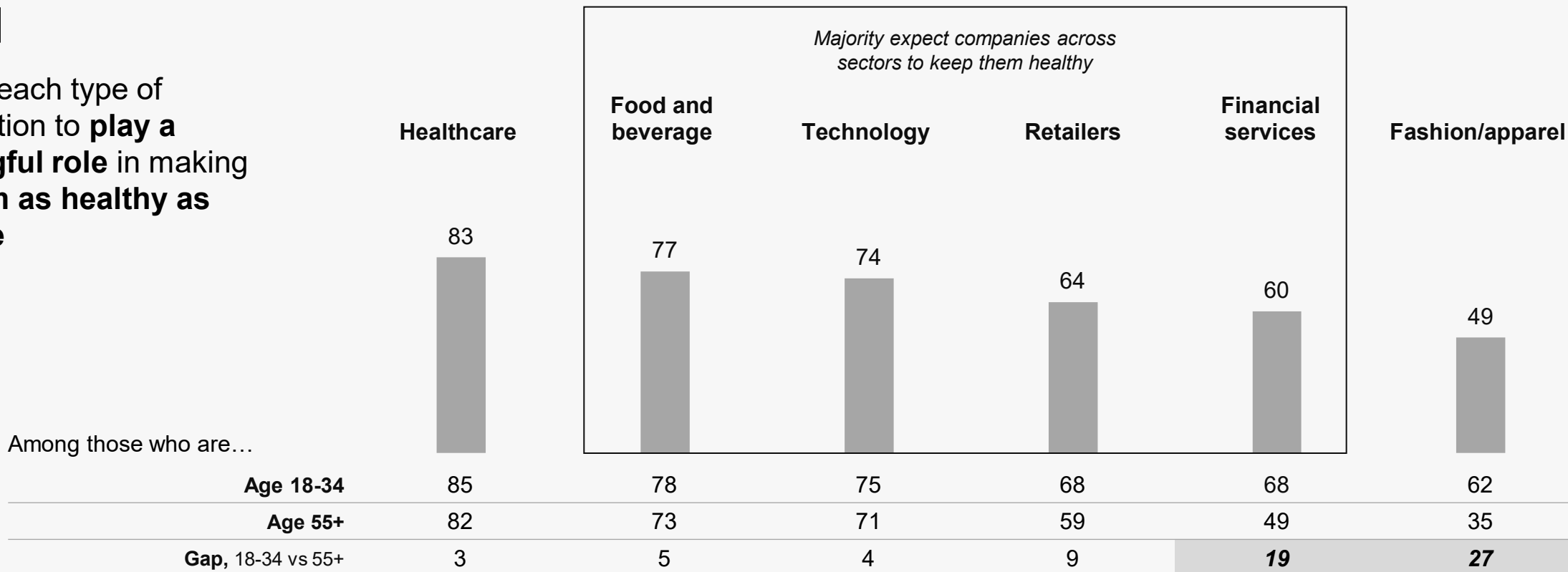


Organizations Across Sectors Must Play a Meaningful Role in My Health

Percent who say

GLOBAL 12

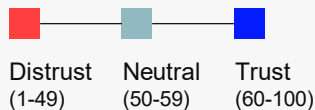
I expect each type of organization to **play a meaningful role** in making sure I am as healthy as possible



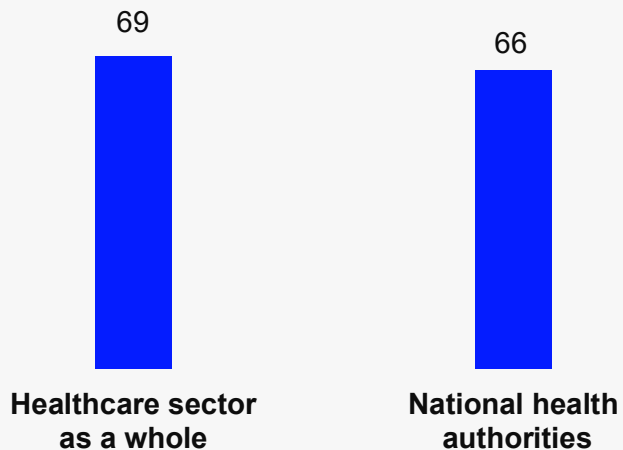
Employers Only Non-Health Institutions Trusted With Health

Percent who say

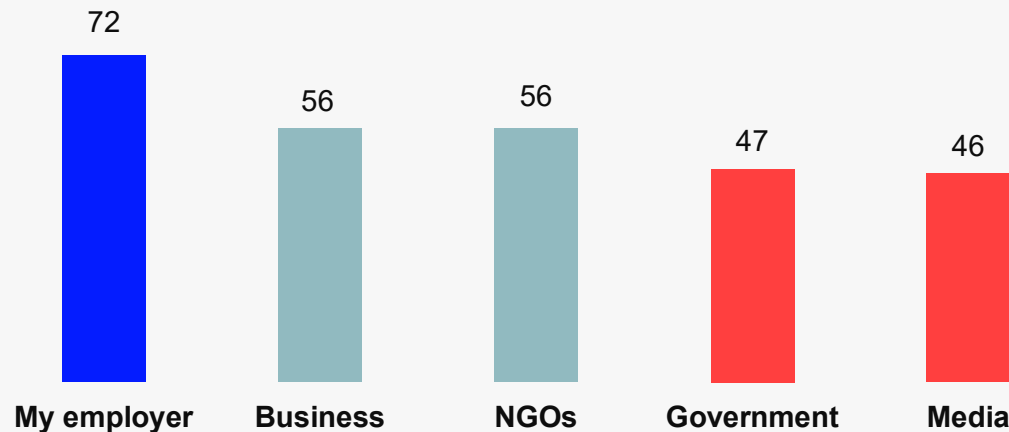
GLOBAL 12



I trust this institution to do what is right in general



I trust this institution to do what is right when it comes to addressing health-related needs and concerns



2023 Edelman Trust Barometer Special Report: Trust and Health. 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. TRU_INS_HEA. Please indicate how much you trust each of the following to do what is right when it comes to addressing your health-related needs and concerns. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 12-mkt avg. "My employer" only asked among those employed by an organization (Q43/1).

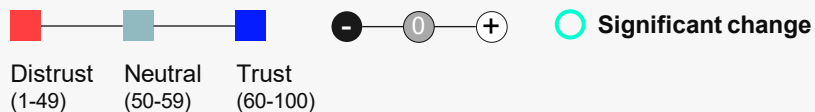


Rise in Peer Voices and Empowered Patients

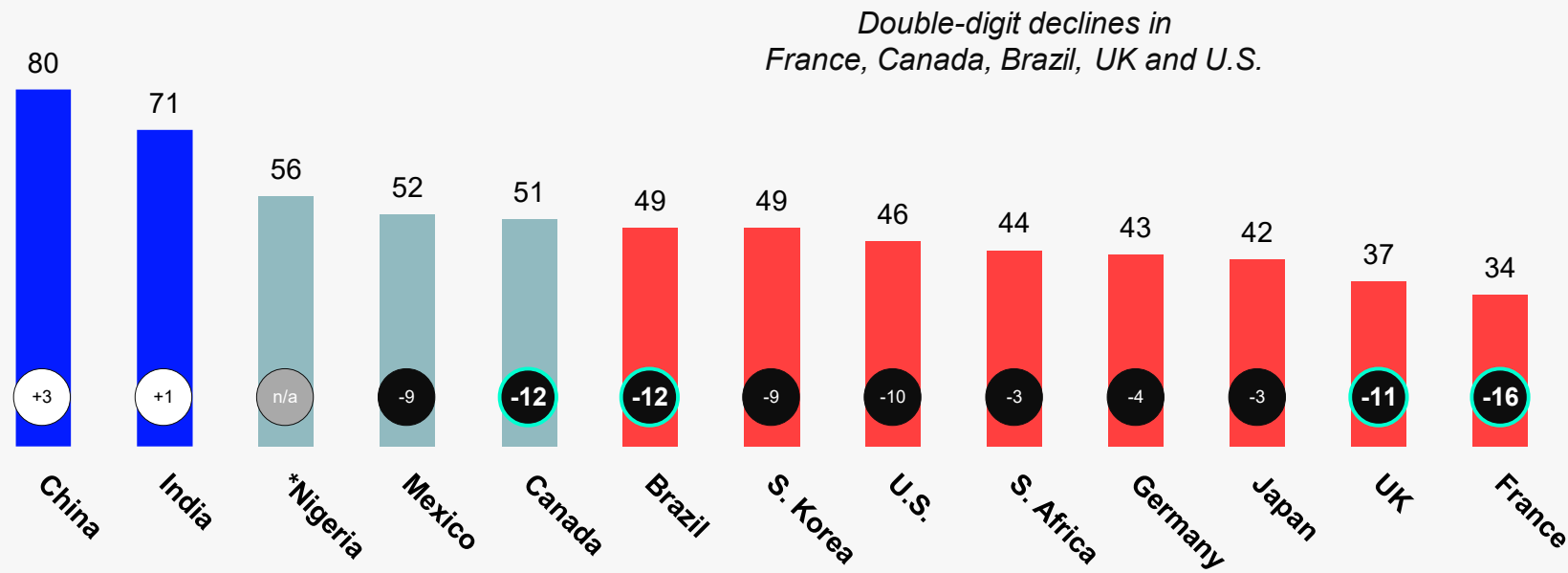
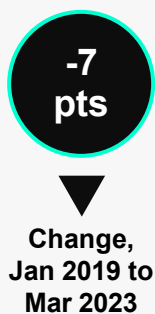
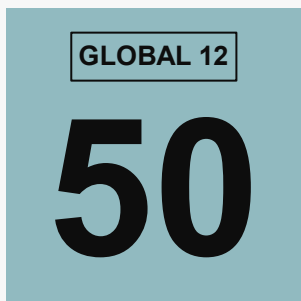


Trust in the Media's Healthcare Reporting Plummetes Since 2019

Percent who say



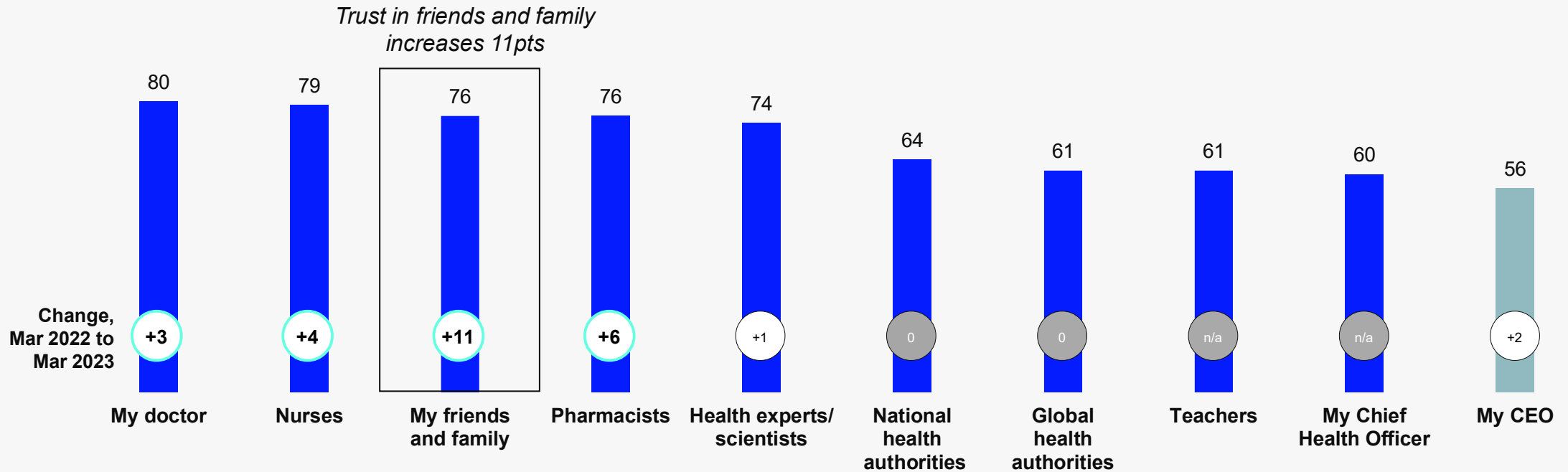
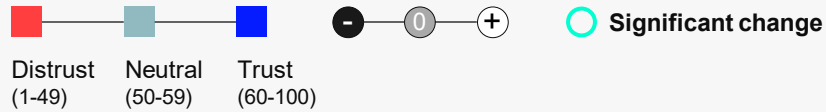
I trust the media to report accurate information about healthcare



Trust in Peer Voices Now on Par with Medical Experts

Percent trust to tell the truth about health issues and about how to best protect the health of the public

GLOBAL 9



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_TRU_PEP. Below is a list of categories of people. For each one, please indicate how much you trust that group of people to tell you the truth about health issues and about how best to protect the health of the public. 9-point scale; top 4 box, trust. General population, 9-mkt avg. "My Chief Health Officer" and "my CEO" only asked of those who are an employee of an organization (Q43/1). Data shown is rebased to exclude those who selected "don't know/not applicable." Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

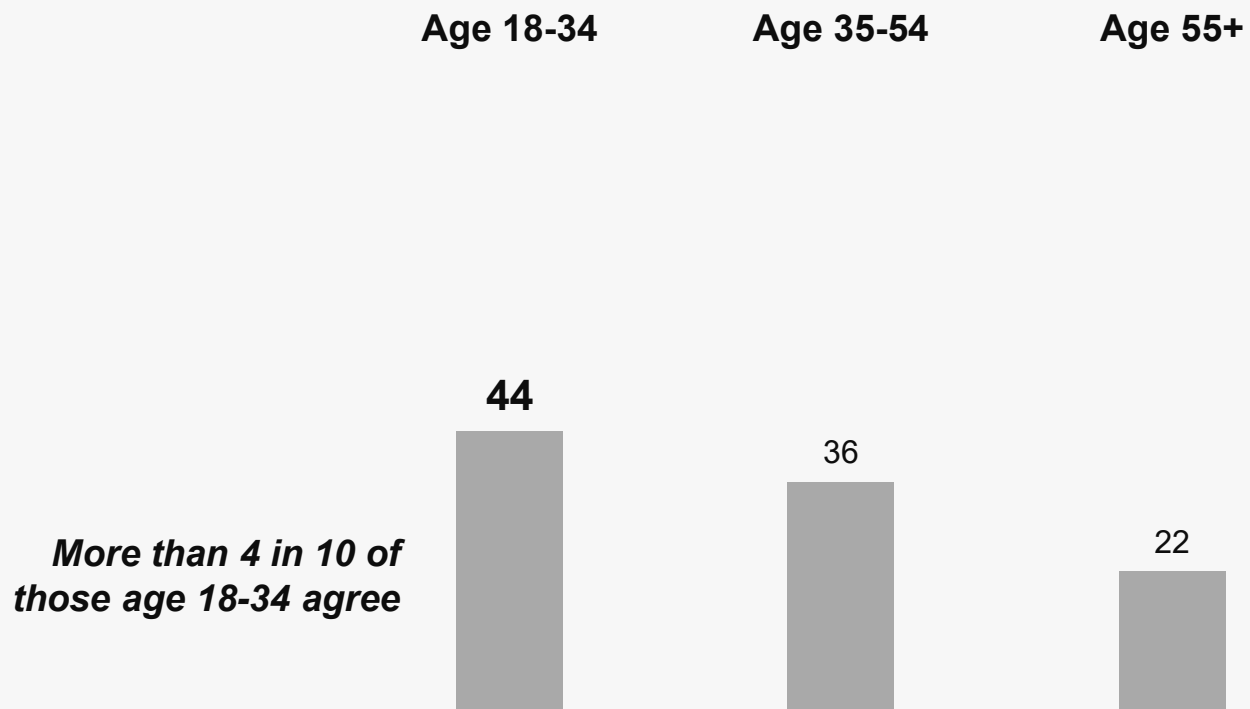


Many Believe the Average Person Can Know as Much as a Doctor

Percent who agree

GLOBAL 12

The average person who has done their **own research** is **just as knowledgeable** on most health matters **as doctors**



Health Infodemic: The Unvaccinated Rely on Internet and Peer Voices, Not Experts

Percent who say

I relied on this source the most for information and advice on vaccinations...

Among those who are fully vaccinated

- | | |
|-----------|--|
| #1 | My doctor |
| #2 | Recommendations of national health experts |
| #3 | My friends and family |
| #4 | The news media |
| ↓ | |
| #7 | Internet searches |

Among those who are unvaccinated because they don't want to be

- | | |
|-----------|--|
| #1 | Internet searches |
| #2 | My friends and family |
| #3 | I did not rely on any information/advice |
| #4 | My doctor |
| ↓ | |
| #8 | Recommendations of national health experts |

2022 Edelman Trust Barometer Special Report: Trust and Health. VAC_INPUT. In deciding whether or not to get vaccinated for COVID-19, which of the following did you rely upon the most for information and advice? Pick all that apply. "My co-workers" and "My employer" only shown to those who are an employee of an organization (Q43/1). General population, 9-mkt avg., among those who are fully vaccinated (VAC_STA_TUS/1) and unvaccinated because they don't want to be (VAC_STA_TUS/3). "None of the above" was an answer option and was excluded from the rankings.

Build a Healthcare System I Can Trust



Bridging the Trust Divide: Embrace the Voices They Will Hear

Among those with lower vs higher trust in the health ecosystem, sources most likely to be trusted or believed and most convincing recommendation style

GLOBAL 12

Among those with lower trust in the health ecosystem		Among those with higher trust in the health ecosystem
Friends and family	Most trusted source of health information	My doctor
My employer	Most believable channel for health information	National health authorities
Show credentials <i>and</i> Let me ask questions	Most convincing health expert recommendations	Use clear, informal language

2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_TRU_PEP. Below is a list of categories of people. For each one, please indicate how much you trust that group of people to tell you the truth about health issues and about how best to protect the health of the public. 9-point scale; top 4 box, trust. Data shown is rebased to exclude those who selected "don't know/not applicable." HEAR_TIME_HEA. When you see a new piece of information or a news story about a health or healthcare issue in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample; "Employer communications" only shown to those who are an employee of an organization (Q43/1). Data is a net of codes 1-3, zero/once/twice. INF_REL. If health experts want to get you to change your behavior to help you improve or protect your own health and the health of those around you, how important is it that they do each of the following? 5-point scale; top 2 box, very/extremely important. Question asked of half of the sample. General population, 12-mkt avg., by level of trust in health ecosystem. For full details on how the Health Ecosystem Trust scale was built, please refer to the Technical Appendix.



Health Experts: Talk To Me Like I'm Your Equal Partner

Percent who say

GLOBAL 12

If health experts are trying to get me to change my behavior, it is very/extremely important they do each of the following

Include me in the science

Show the recommendation was based on data collected from people like me

60%

Show how it fits my life

Acknowledge the burden the recommended change may present in my life

62%

Give me a voice

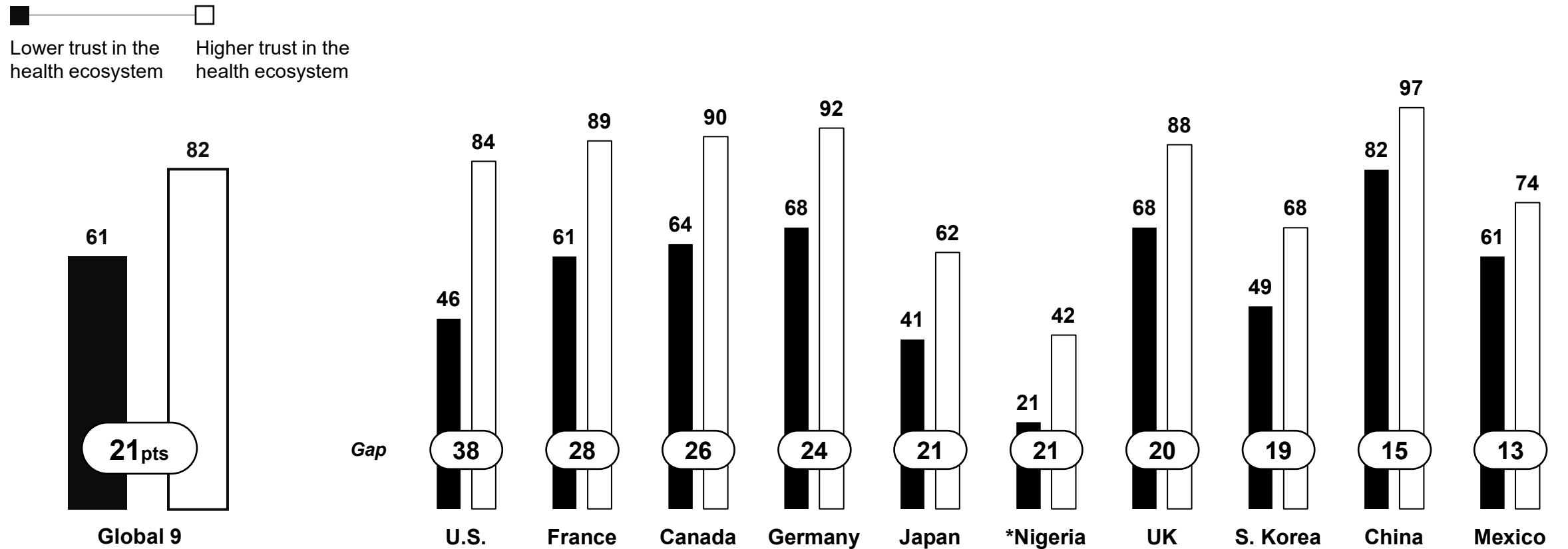
Give me a way to ask questions and voice my concerns

67%



Those with Higher Trust in the Health Ecosystem More Likely to Be Vaccinated

Percent who **are fully vaccinated**, among those with lower vs. higher trust in the health ecosystem



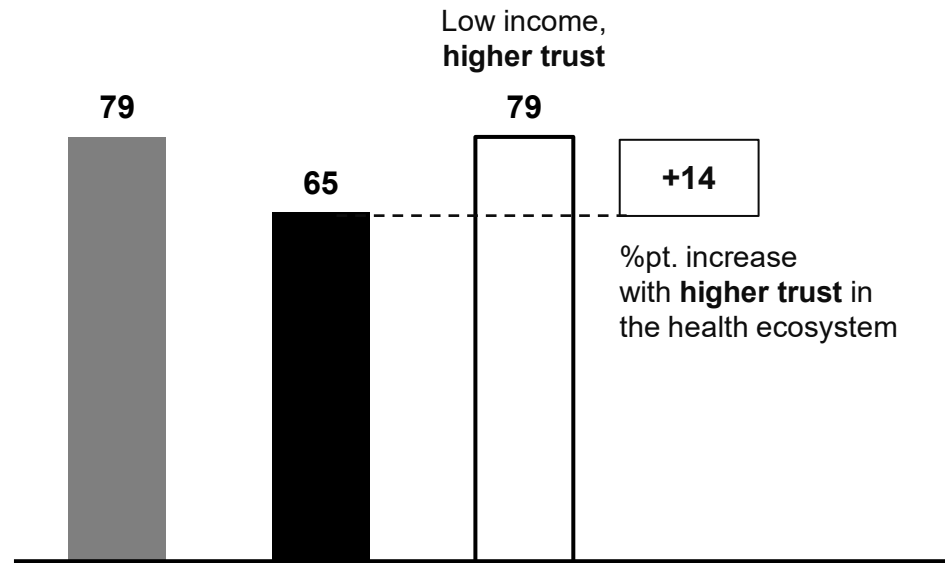
2022 Edelman Trust Barometer Special Report: Trust and Health. VAC_STA_TUS. Which of the following best describes your current vaccine status? General population, 9-mkt avg., by level of trust in health ecosystem. For full details on how the Health Ecosystem Trust scale was built, please refer to the Technical Appendix. *Nigeria is not included in the global average. Data is rebased to exclude those who selected "prefer not to answer."

Trust Mitigates Effect of Social Disparities on Vaccination Rates

Percent who are fully vaccinated, and percentage point gain associated with higher trust in the health ecosystem

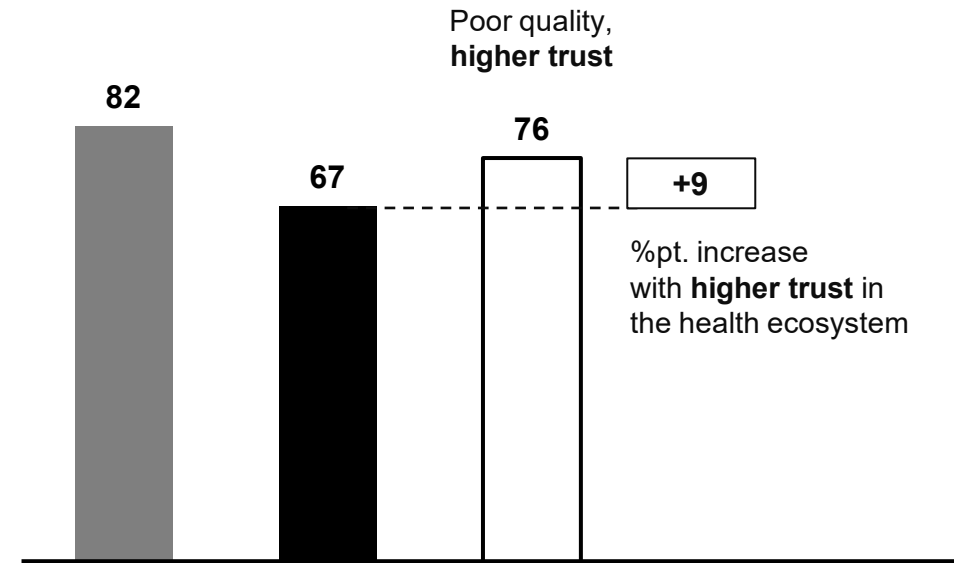
SOCIAL DISPARITY: INCOME LEVELS

High income Low income



SOCIAL DISPARITY: QUALITY OF HEALTHCARE

High quality Poor quality



2022 Edelman Trust Barometer Special Report: Trust and Health. VAC_STA_TUS. Which of the following best describes your current vaccine status? General population, 9-mkt avg., by income and quality of healthcare (CRE_ACC/1-4; 5-7); and among low income with higher trust in health ecosystem, and poor-quality healthcare with higher trust in health ecosystem. For full details on how the Health Ecosystem Trust scale, please refer to the Technical Appendix. Data is rebased to exclude those who selected "prefer not to answer."

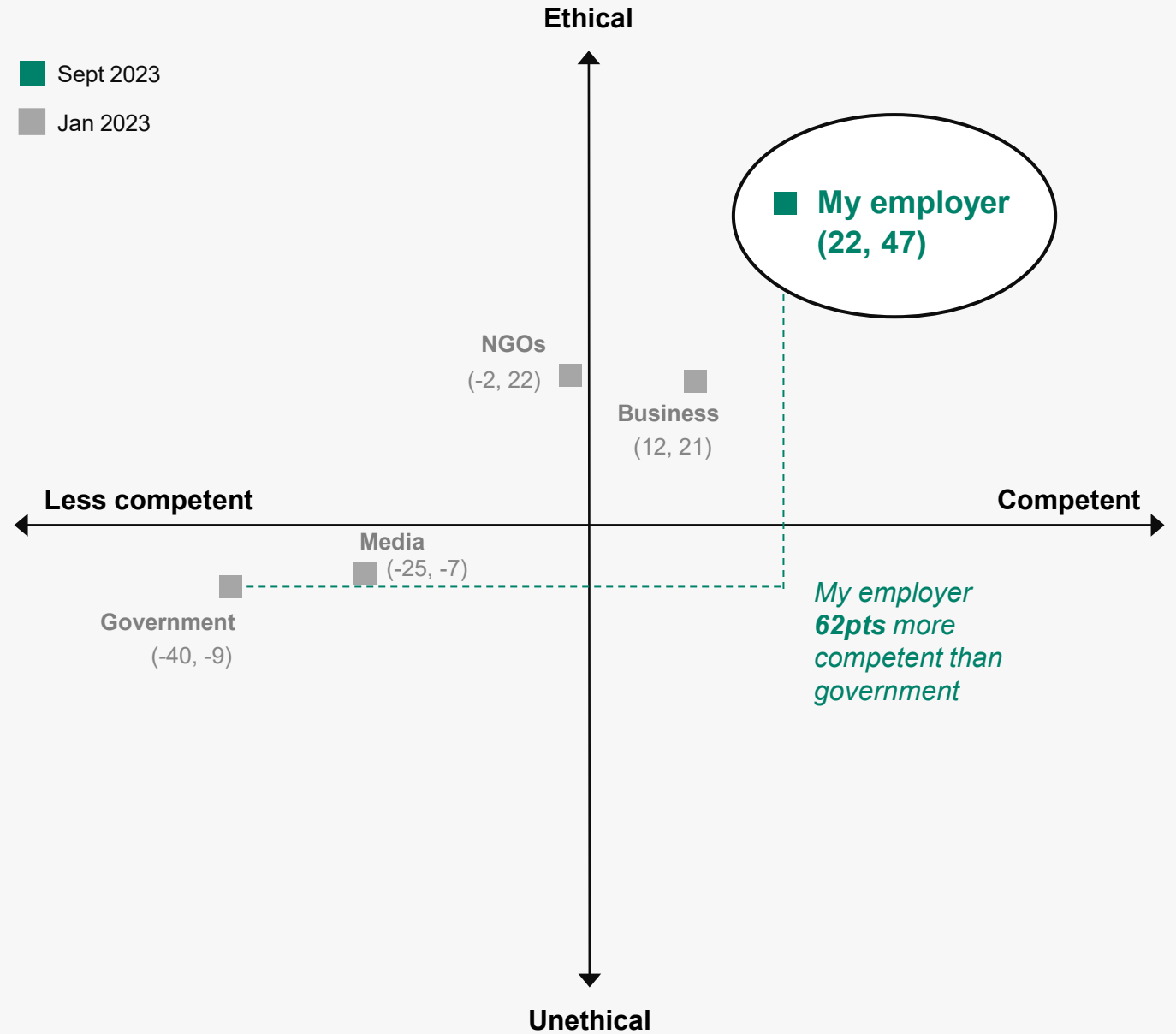
Employers: Invest in Our Health



'My Employer' Is Most Competent and Ethical Institution

(Competence score, net ethical score)

GLOBAL 6 Excludes China



2023 Edelman Trust Barometer Special Report: Trust at Work. The ethical scores are averages of nets based on EMP_PER_DIM/1-4. The competence score is a net based on TRU_3D_EMP/1. 6-mkt avg. Data filtered to exclude China. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

2023 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]_PER_DIM/1-4. Government and Media were only asked of half of the sample. The competence score is a net based on TRU_3D_[INS]/1. Government and Media were only asked of half of the sample. General population, 6-mkt avg. Data not collected in China. All data is filtered to be among employees who work for an organization or corporation (Q43/1).

For full details regarding how this data was calculated and plotted, please see the Technical Appendix.



The Opportunity: Address the Societal Factors That Affect Our Health

Percent who say

To improve people's health,
organizations must:

GLOBAL 12

Provide **trustworthy health information**

77

Address health issues such as **climate or inequality**

74

Improve health of your **local communities**

73

Convene stakeholders to improve healthcare

69



Employers: Show Me That You Value Mental Health and Work-Life Boundaries

Percent of employees who say

GLOBAL 12

To improve their employees' health:

My CEO must talk about the importance of mental health in the workplace

77%

My CEO must model healthy behavior, such as respecting boundaries between work and non-work and taking all their PTO

78%

My employer must implement policies to prevent burnout

83%



Top Takeaways

1

Address health inequalities

Cost is the number one barrier keeping people from being as healthy as they want to be. Address the societal issues and inequities that disproportionately affect those with lower access to affordable care.

2

Leverage the dispersion of authority

Friends and family have grown as trusted on health matters as domain experts. Rather than fighting this trend, incorporate it into your approach.

3

Act locally to drive better health outcomes

People increasingly trust those close to them when making decisions about their health. Work with other community stakeholders to tap into this desire and find new ways to engage.

4

Advocate for the truth

Employers have an essential role to play in the information ecosystem. Be a source of reliable information that is easily accessible, rooted in science and communicated through empathy.



**THANK
YOU**

Questions?

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