

Country Report

Trust in Germany



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% (n=15,525).
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

countries

36,000+

respondents

1,150+

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*

Argentina
Australia
Brazil
Canada
China
Colombia
France
Germany
India
Indonesia
Ireland
Italy
Japan
Kenya
Malaysia
Mexico
Nigeria
Russia
Saudi Arabia
Singapore
S. Africa
S. Korea
Spain
Thailand
The Netherlands
UAE
UK
U.S.

22 YEARS OF TRUST

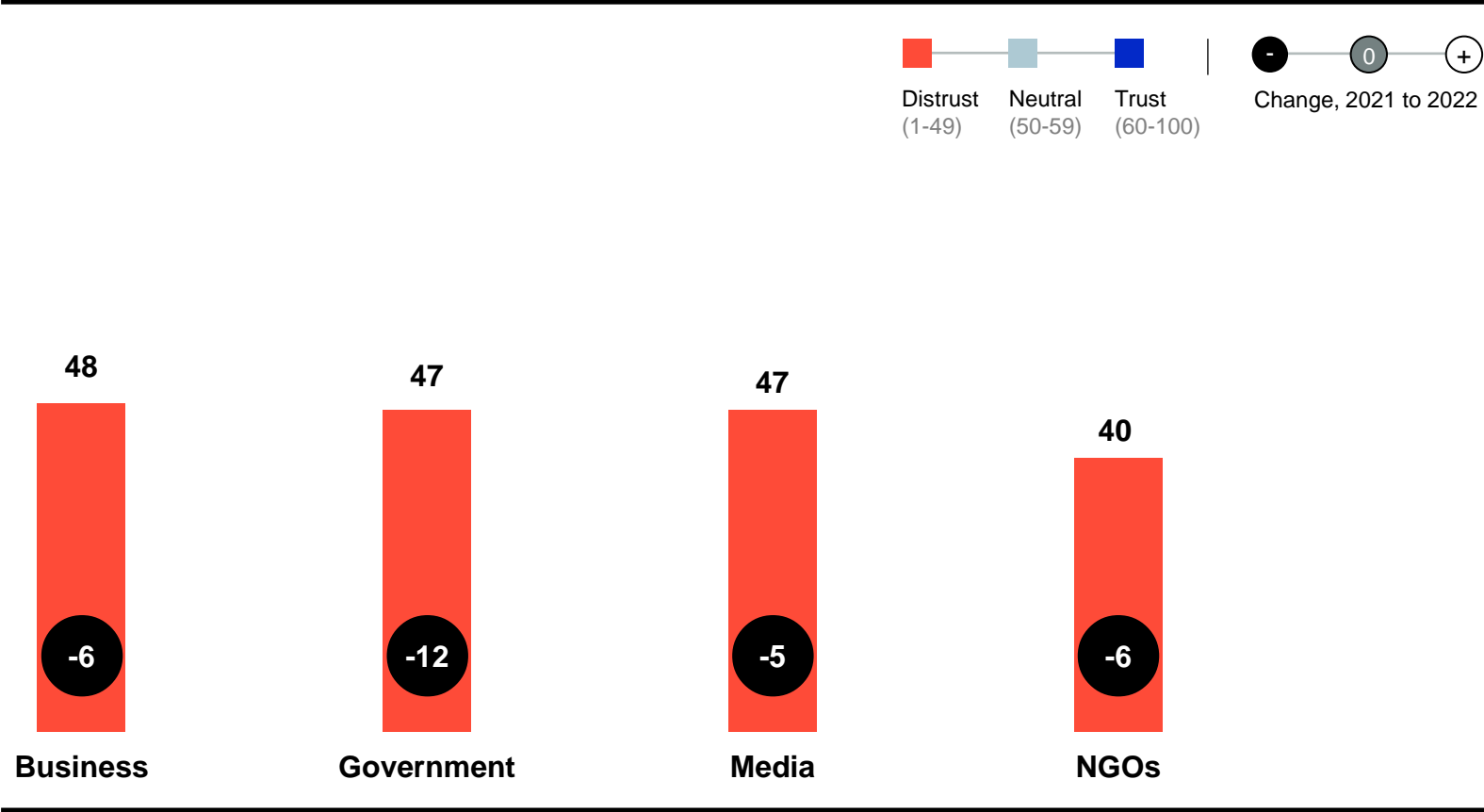
'01	'02	'03	'04	'05	'06	'07	'08	'09	'10	'11
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted 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	'15	'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	The Cycle of Distrust



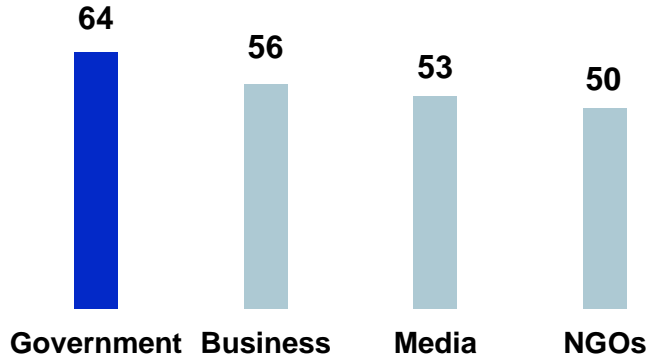
GOVERNMENT AND MEDIA FUEL A CYCLE OF DISTRUST

NO INSTITUTIONS TRUSTED IN GERMANY; SHARPEST DECLINE FOR GOVERNMENT

Percent trust, in Germany



IN MAY 2020, GOVERNMENT MOST TRUSTED



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, Germany.

2020 Edelman Trust Barometer Spring Update. 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, Germany.

GOVERNMENT AND MEDIA SEEN AS DIVISIVE

Percent who say, in Germany

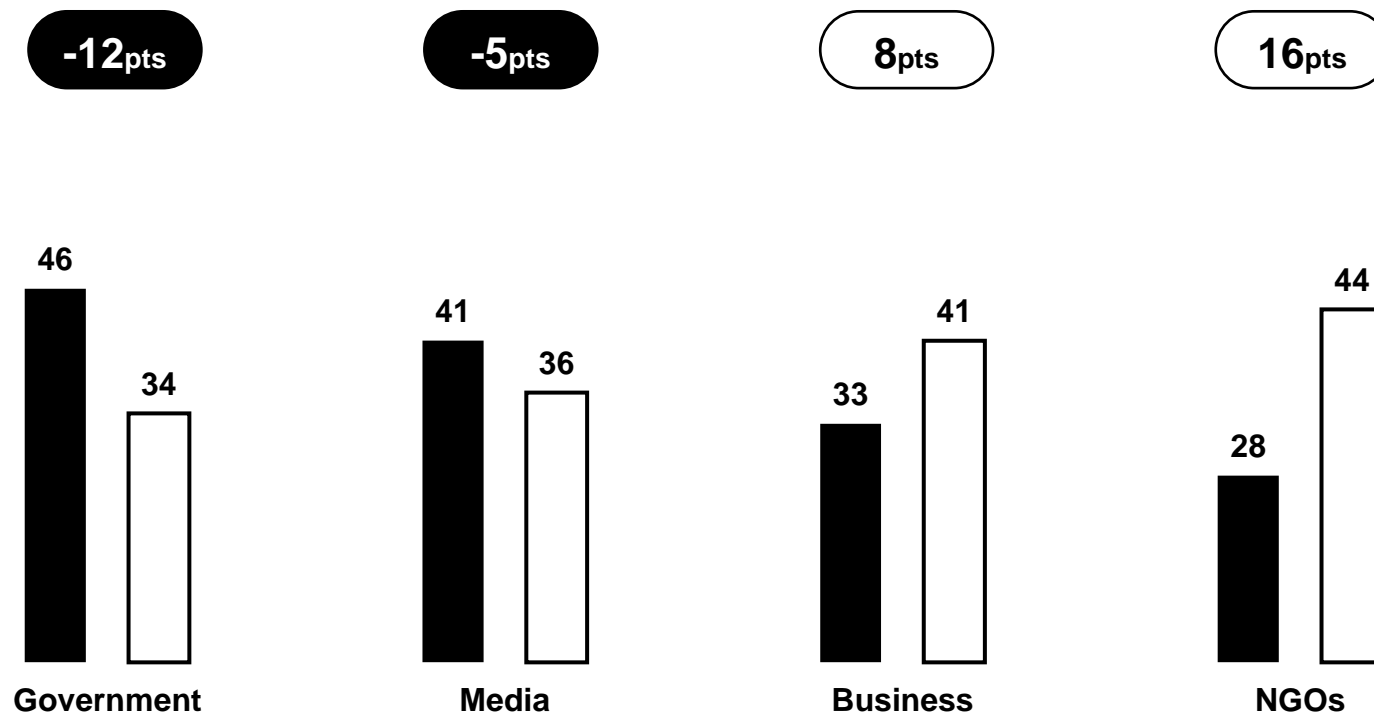
These institutions are...



a **dividing**
force in society

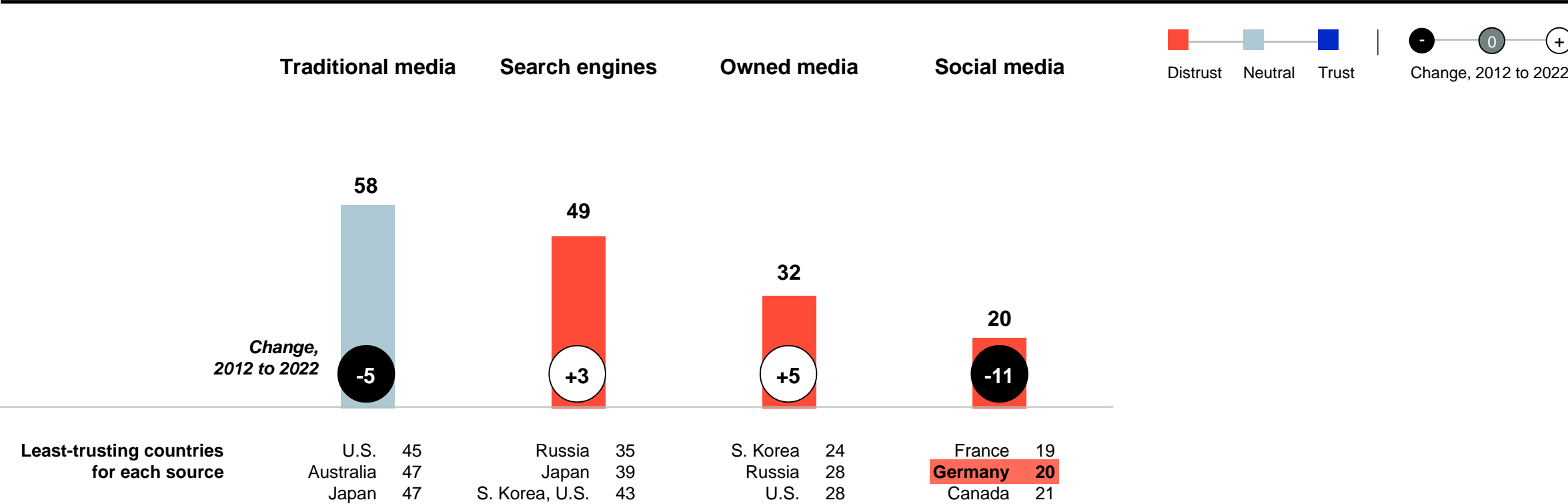
a **unifying**
force in society

*Gap,
difference between
unifying force vs.
dividing force*



NEWS SOURCES FAIL TO FIX THEIR TRUST PROBLEM

Percent trust, in Germany



2022 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? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Germany.
*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

FAKE NEWS CONCERNS AT ALL-TIME HIGHS

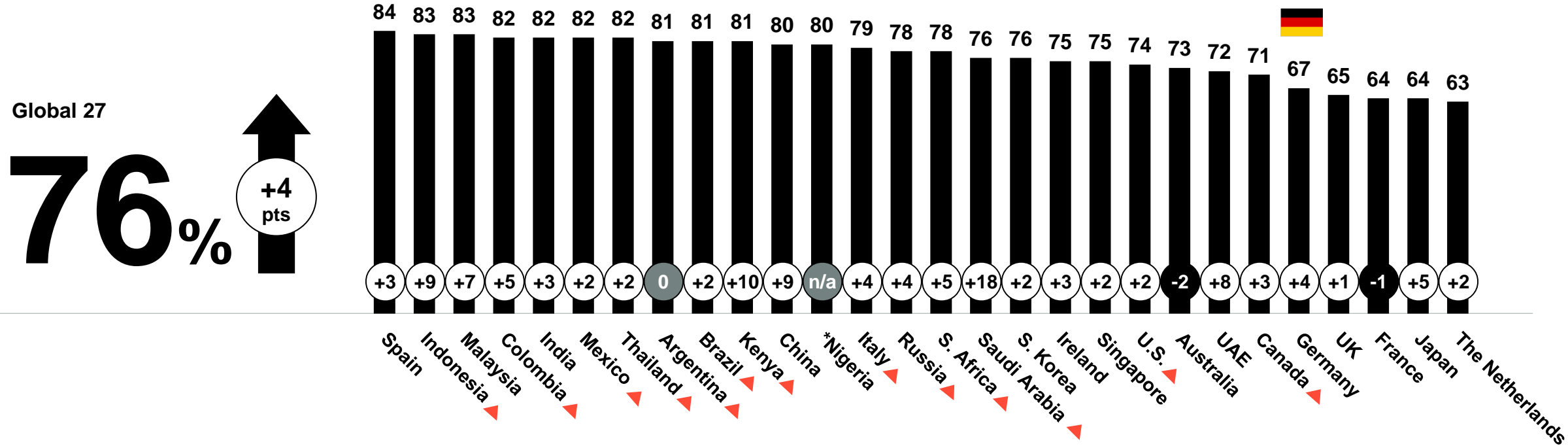
Percent who agree



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



GOVERNMENT NOT SEEN AS ABLE TO SOLVE SOCIETAL PROBLEMS

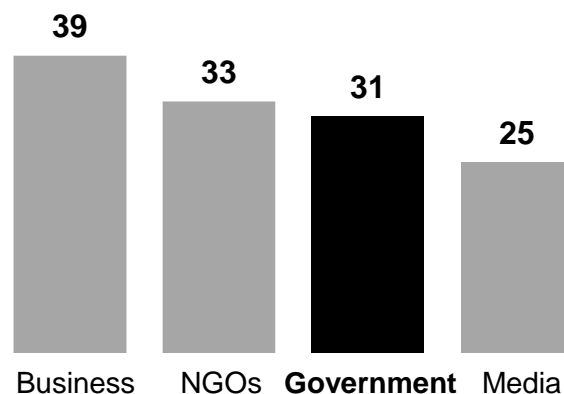
Percent who say each is a strength of institutions, in Germany

Take a leadership role

*Coordinate cross-institutional efforts
to solve societal problems*

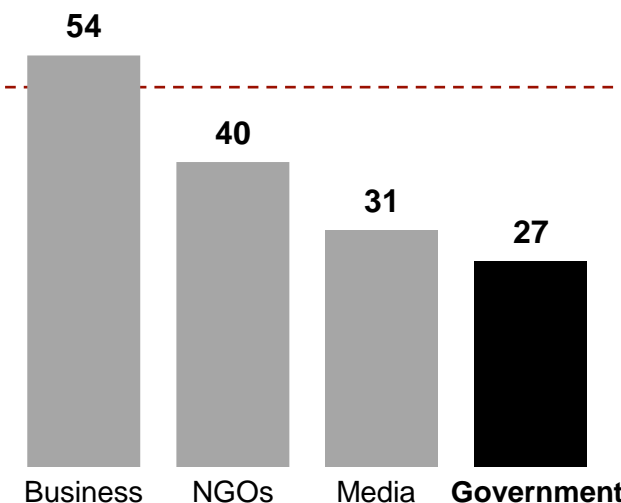
Majority do not
see as strength

50%



Get results

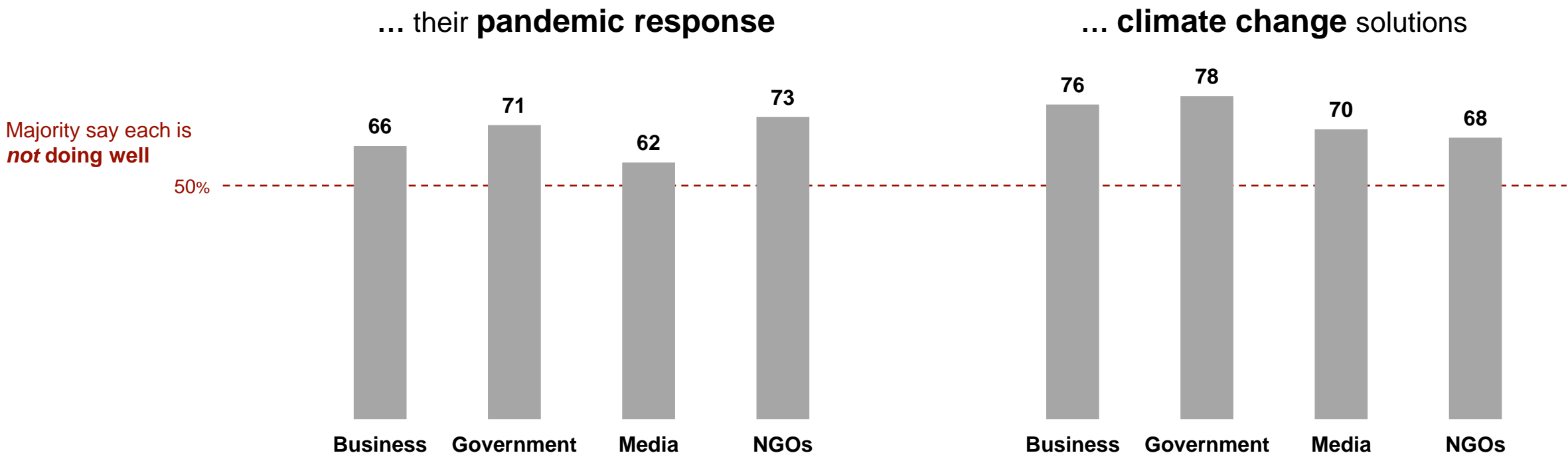
*Successfully execute plans and strategies
that yield results*



SPRING 2021: INSTITUTIONS FAILING TO ADDRESS EXISTENTIAL CHALLENGES

Percent who say, in Germany

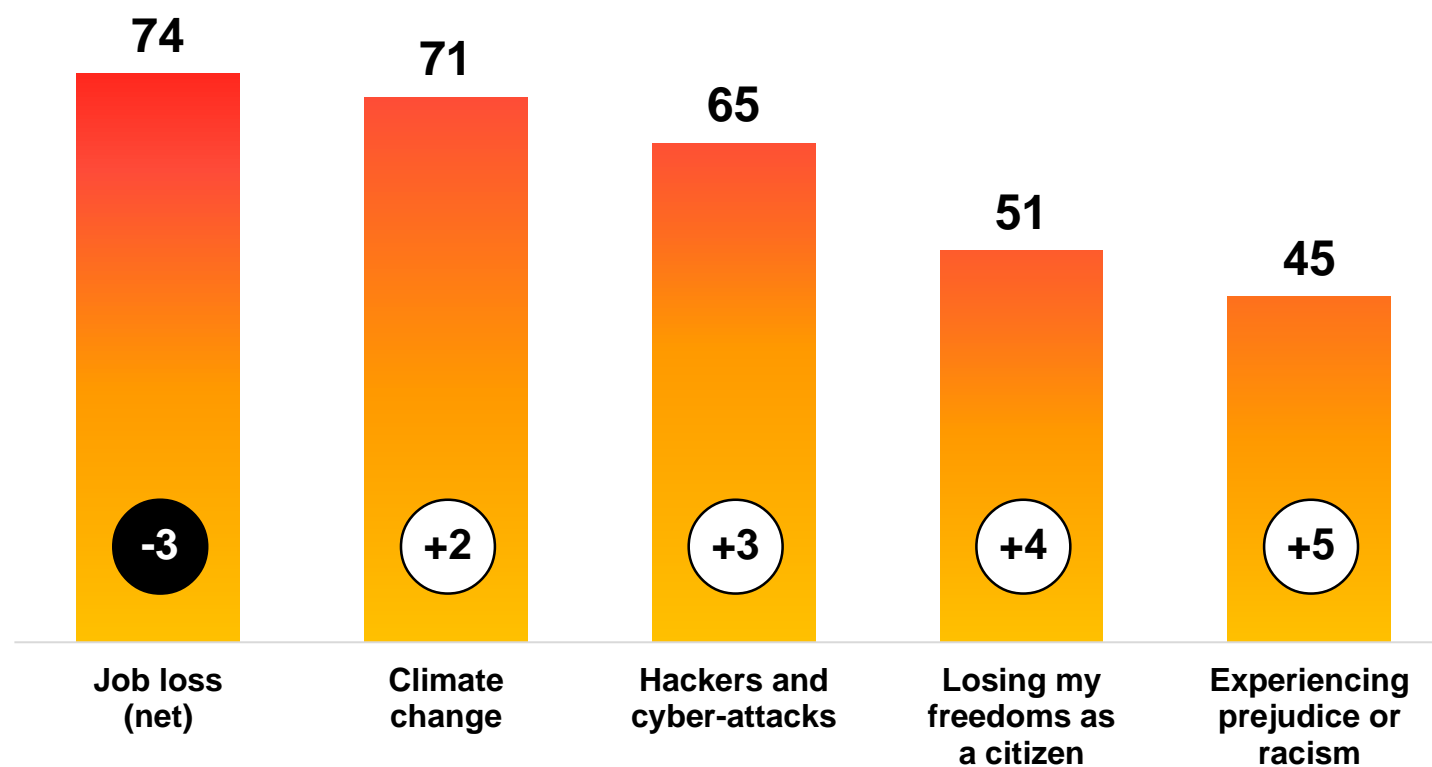
Institutions are not doing well on ...



SOCIETAL FEARS ON THE RISE

Percent who worry about each, in Germany

Change, 2021 to 2022

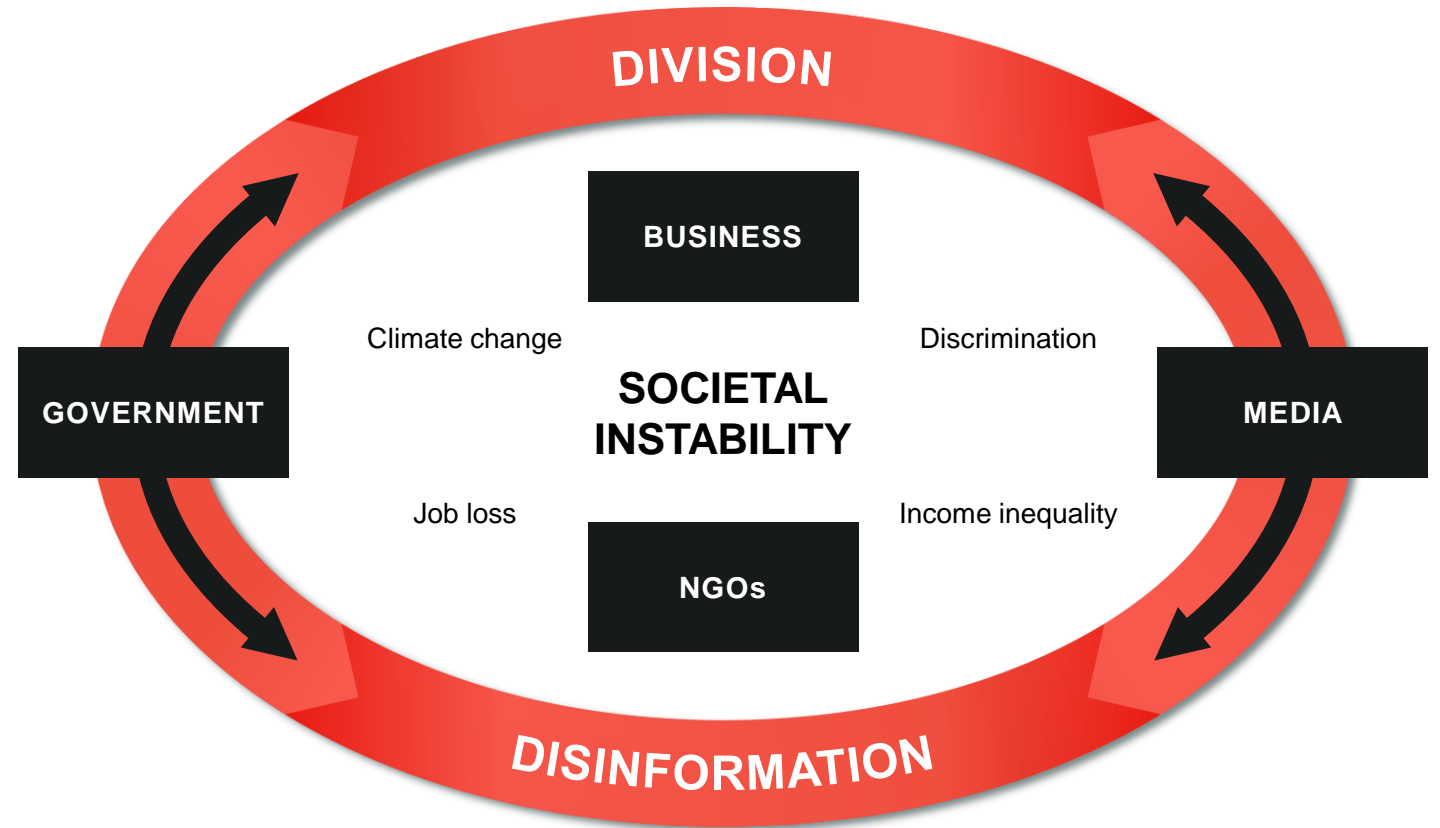


2022 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Non-job loss attributes shown to half of the sample. General population, Germany. 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.

CYCLE OF DISTRUST THREATENS 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

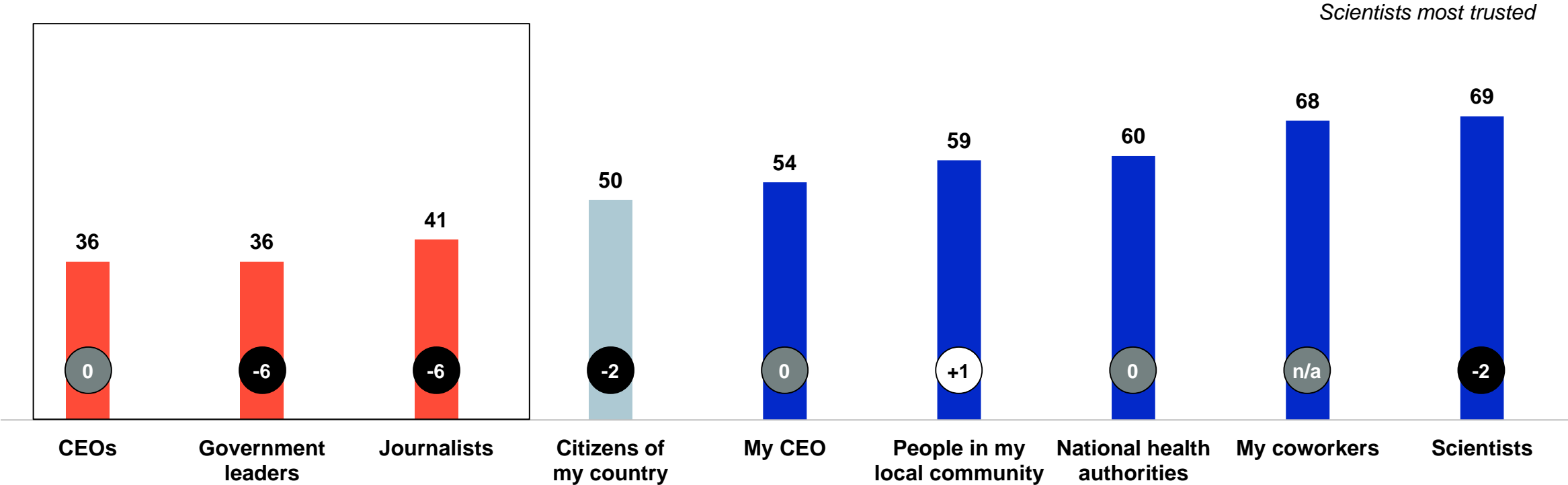




FAILURE OF LEADERSHIP MAKES DISTRUST THE DEFAULT

SOCIETAL LEADERS NOT TRUSTED

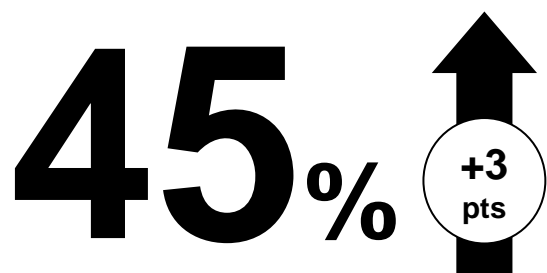
Percent trust, in Germany



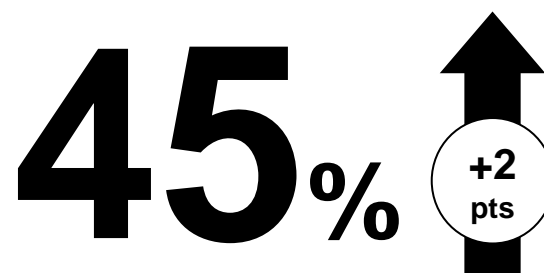
MORE CONVINCED WE'RE BEING LIED TO BY SOCIETAL LEADERS

Percent who worry, in Germany

Change, 2021 to 2022



Business leaders



Journalists and reporters



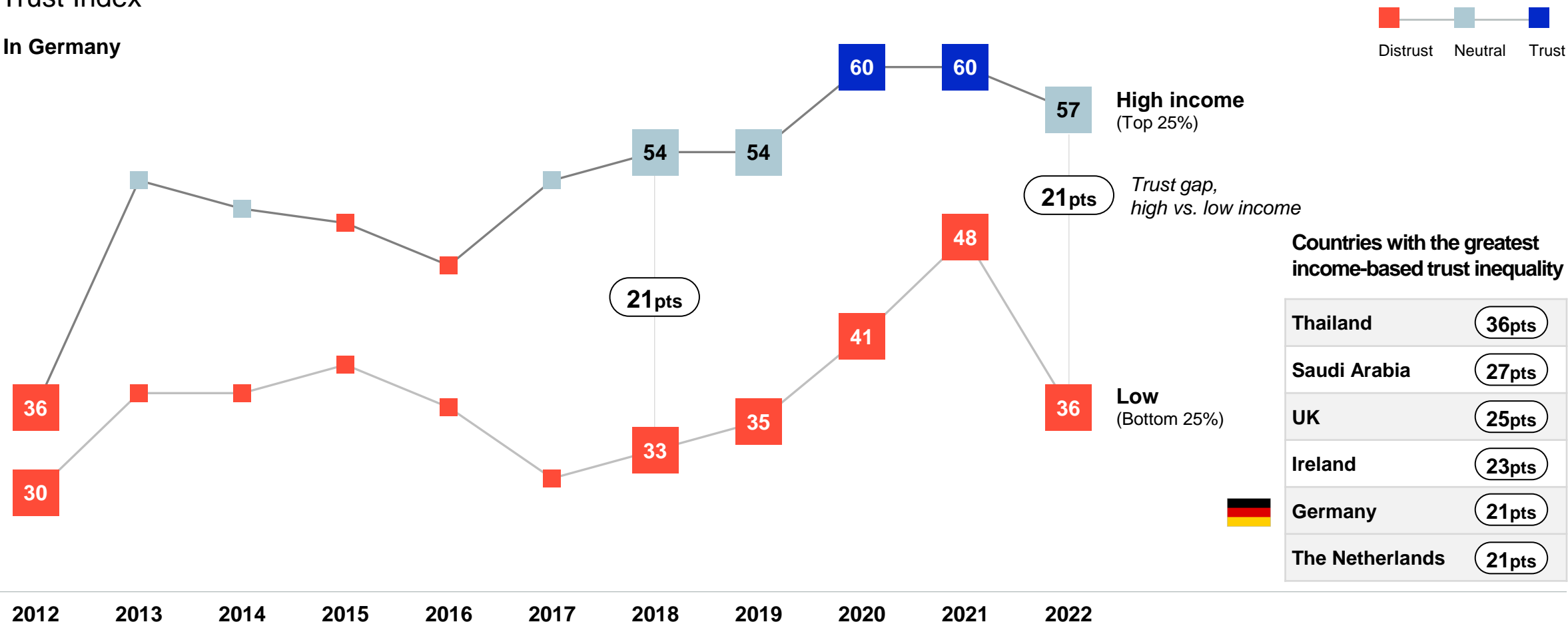
My country's government leaders

are **purposely trying to mislead people** by saying things they know are false or gross exaggerations

TRUST GAP BETWEEN HIGH AND LOW INCOME RETURNS TO RECORD HIGH

Trust Index

In Germany



CIRCLES OF TRUST BECOME MORE LOCAL

Percent who say each has increased or decreased during the pandemic, in Germany



LESS TRUST FOR OUTSIDERS

My trust in...	Net change	<i>increased</i>	<i>decreased</i>
people from other countries	-11	9	20
people who live in other states, provinces, or regions	-4	13	17



CLOSER BONDS WITH NEIGHBORS AND COWORKERS

How close I feel...	Net change	<i>increased</i>	<i>decreased</i>
to my coworkers	+11	23	12
to my neighbors	+11	20	9

DISTRUST IS THE DEFAULT: NO BASIS FOR PEACEFUL DEBATE

Which are you more likely to believe?

53% **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

64%

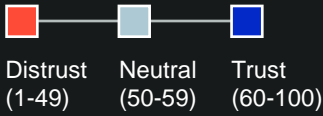
2022 Edelman Trust Barometer. TRU_CHOICE. You are about to see two choices. We want you to choose the one that best describes you and your beliefs. Question asked of half of the sample. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. 9-point scale; top 4 box, true. Question asked of half of the sample. General population, Germany.



COLLAPSE OF TRUST IN DEMOCRACIES

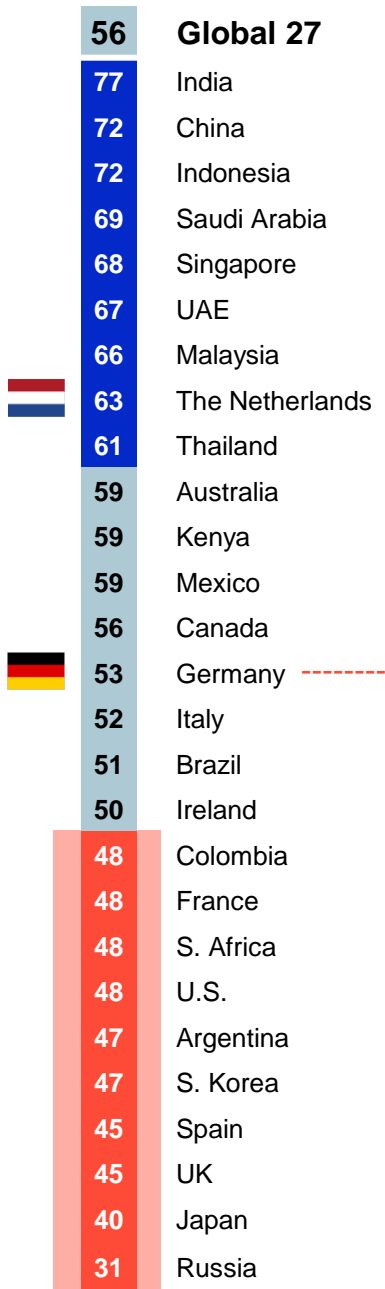
TRUST FALLS IN DEMOCRACIES

Trust Index

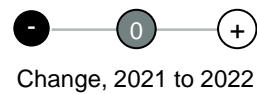
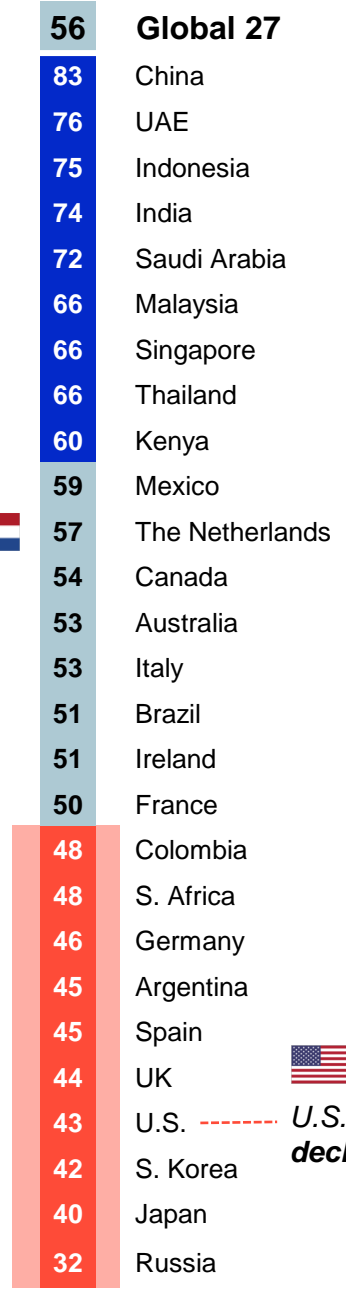


2022 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt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

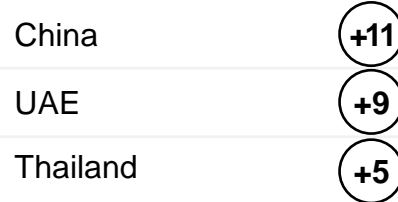
2021 General population



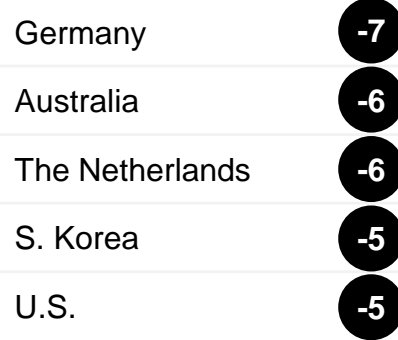
2022 General population



Biggest gainers:



Biggest losers:



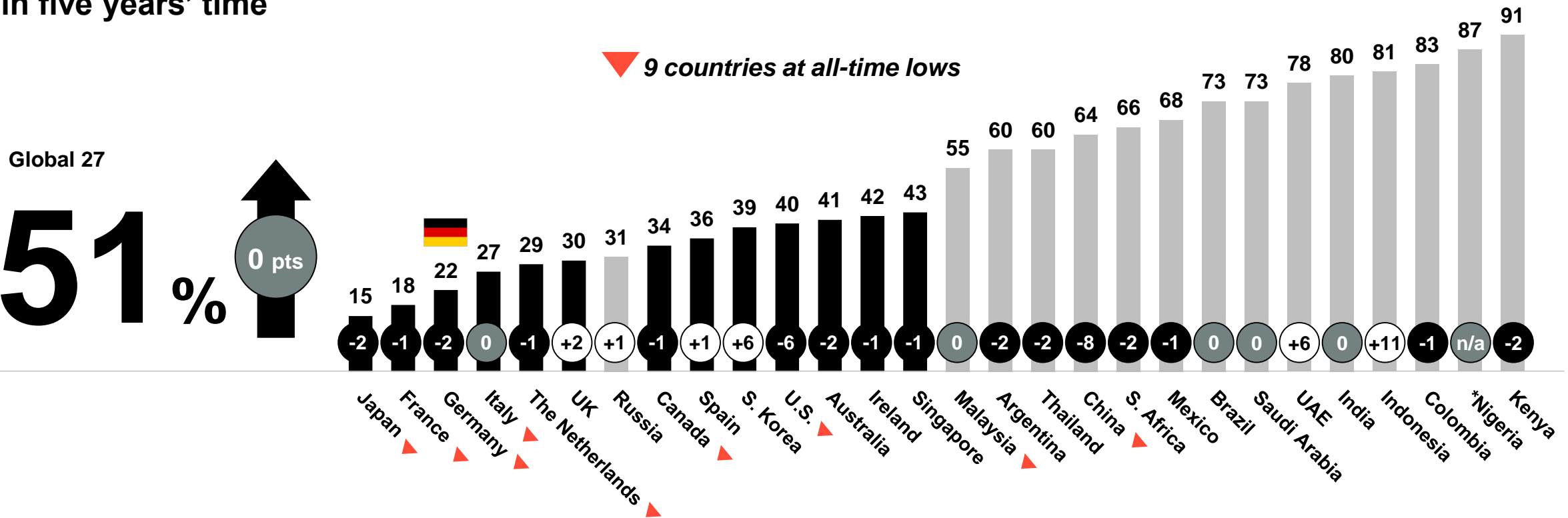
U.S. Trust Index has declined 10 pts since 2017

ECONOMIC OPTIMISM IN GERMANY AT ALL-TIME LOW

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

■ Developed countries ● 0 ● + Change, 2021 to 2022

My family and I will be better off
in five years' time



QUESTIONS ABOUT TODAY'S CAPITALISM

Percent who agree, in Germany

Capitalism as it exists today **does more harm than good** in the world

47%

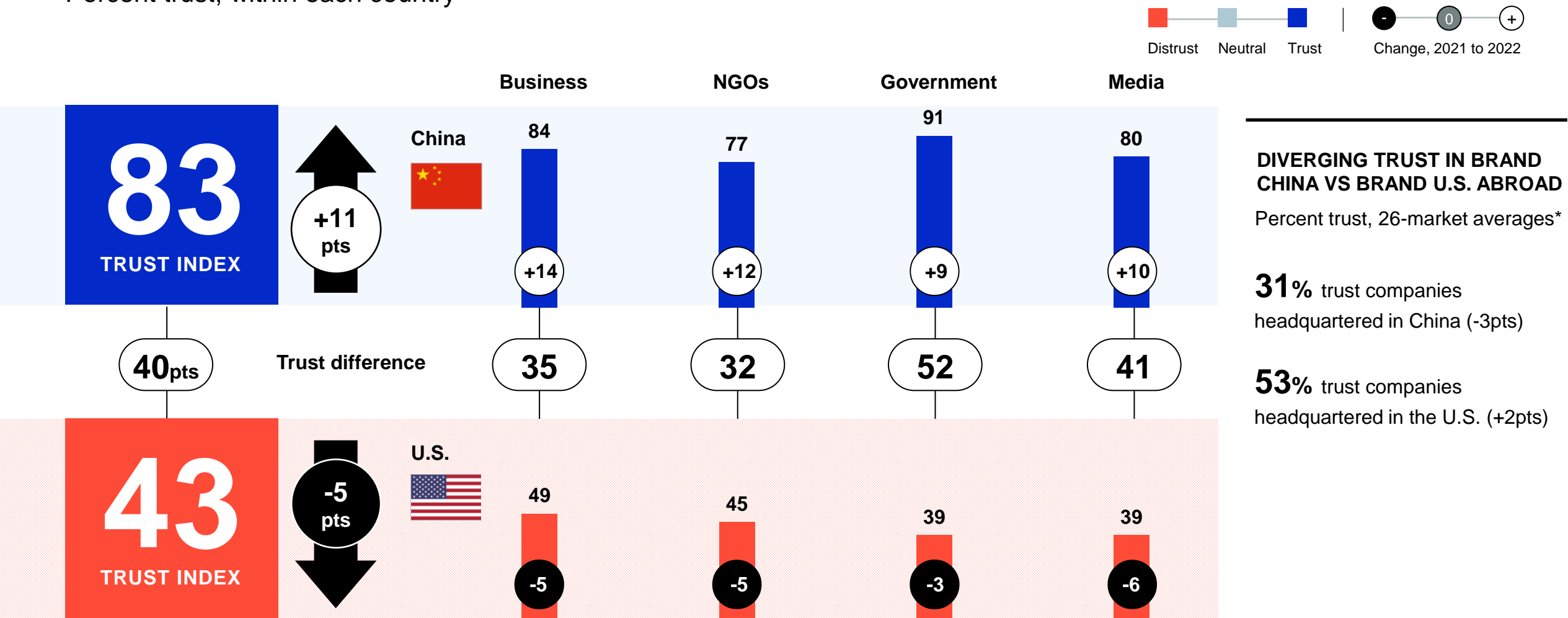
Centrally-managed economies do a better job than free-market economies

22%



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.

A black and white photograph of the lunar surface. Two astronauts in spacesuits are visible, one near the top center and another at the bottom right, both working with large solar panel arrays. The panels are rectangular with a grid pattern. Long, dark shadows are cast across the dusty ground. A large, dark, semi-circular shadow of the Earth dominates the upper left portion of the image. The text "SOCIETAL LEADERSHIP NOW A CORE BUSINESS FUNCTION" is overlaid in white, bold, sans-serif capital letters across the center of the image.

SOCIETAL LEADERSHIP NOW A CORE BUSINESS FUNCTION

ALL STAKEHOLDERS HOLD BUSINESS ACCOUNTABLE

Percent who agree

In Germany

49%

**Buy or advocate
for brands**
based on their beliefs
and values

50%

**Choose a place
to work**
based on their beliefs
and values

50%

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, Germany. 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.

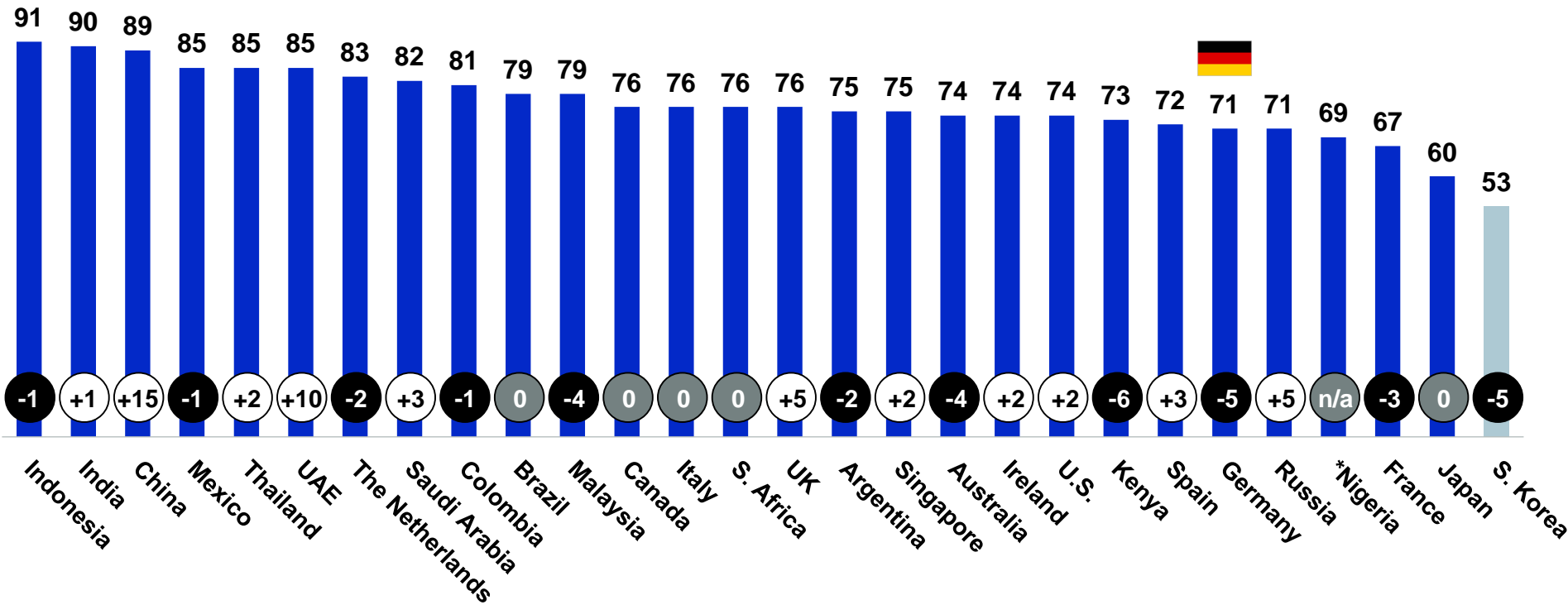
2021 Edelman Trust Barometer Special Report: Institutional Investors. Q7. Please indicate the extent to which you agree or disagree with the following statements regarding shareholder activism. 4-point scale; top 2 box, agree. 7-mkt avg.

MY EMPLOYER TRUSTED AROUND THE WORLD

Percent trust



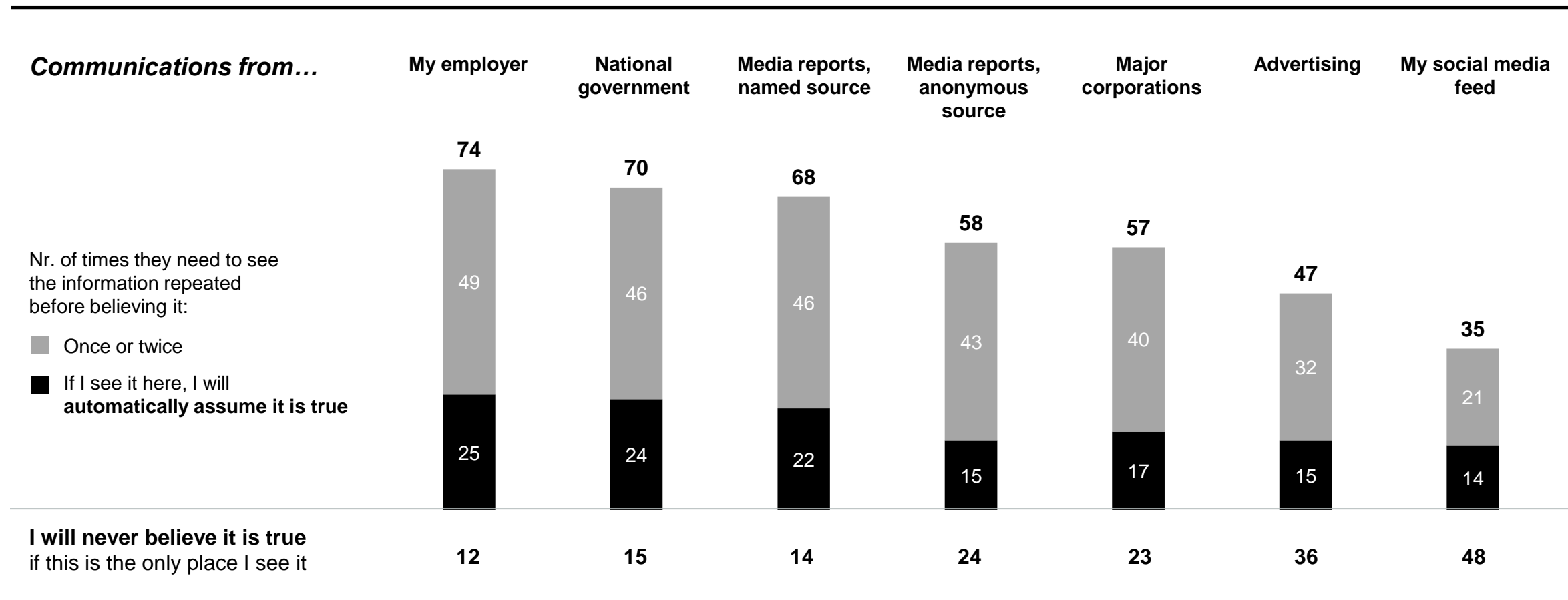
Germany



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, by market. "Your employer" only shown to those who are an employee of an organization (Q43/1). *Nigeria is not included in the global average

IN GERMANY, MY EMPLOYER MEDIA MOST BELIEVABLE

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



2022 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story 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. "Once or twice" is a sum of codes 2 and 3. General population, Germany. "Employer communications" only shown to those who are an employee of an organization (Q43/1).

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

67%
(net)

When considering a job, I expect the CEO to speak publicly about **controversial social and political issues that I care about**

Among employees

48%

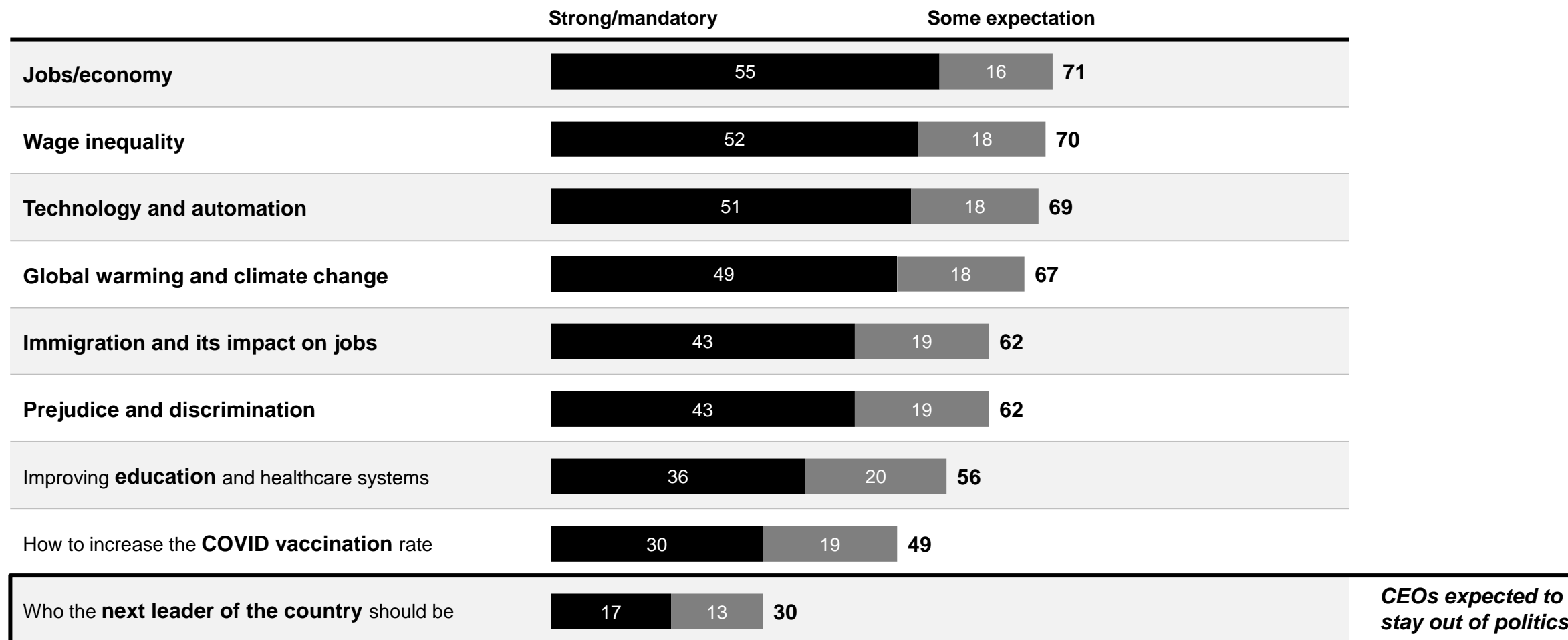


Change,
2019 to 2022

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, Germany.

CEOS EXPECTED TO INFORM POLICY, NOT POLITICS

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



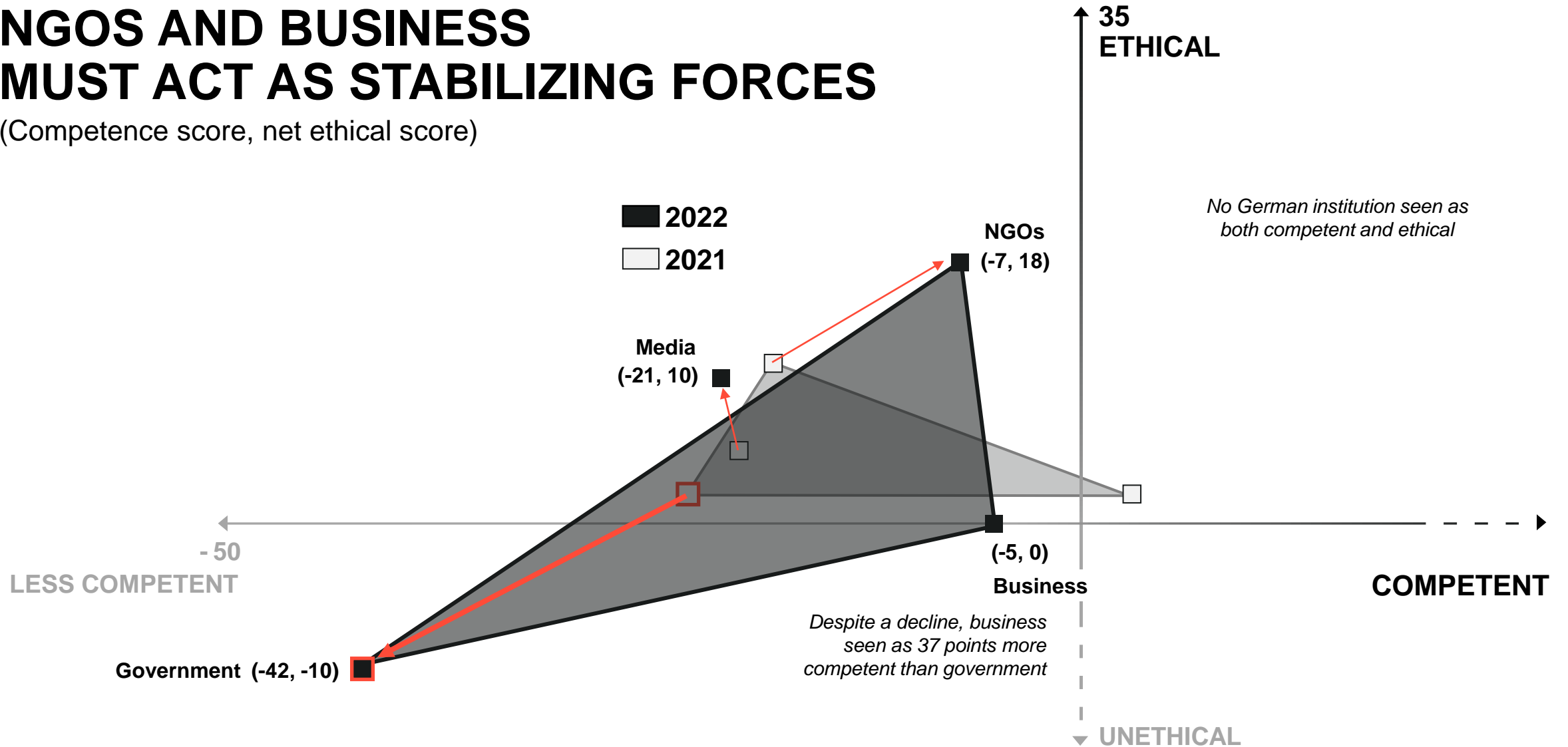
2022 Edelman Trust Barometer. CEO_RSP. For each of the following topics, please indicate to what degree corporate CEOs should be held responsible for directly helping to inform and shape ongoing conversations and policy debates. 5-point scale; codes 4-5, strong/mandatory; code 3, some expectation. Question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



BREAKING THE CYCLE OF DISTRUST

NGOS AND BUSINESS MUST ACT AS STABILIZING FORCES

(Competence score, net ethical score)



2022 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]_PER_DIM/1-4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INS]/1. Depending on the question it was either asked of the full or half the sample. General population, Germany. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

WANT MORE, NOT LESS, BUSINESS ENGAGEMENT ON SOCIETAL ISSUES

Percent who say, in Germany

On addressing each **societal issue**,
business is...



not doing
enough

overstepping

Gap,
not doing enough
vs. overstepping

Climate
change

56pts

61

5

Economic
inequality

52pts

56

4

Workforce
reskilling

43pts

48

5

Trustworthy
information

37pts

43

6

Systemic
injustice

34pts

41

7

Access to
healthcare

33pts

38

5

2022 Edelman Trust Barometer. BUS_BND. Think about business as an institution, and its current level of engagement in addressing societal needs and issues. When it comes to each of the following areas, please indicate if you think business is going too far and overstepping what it should be doing, is doing just the right amount in regard to this activity, or is not going far enough in its actions and should be doing more. 3-point scale; code 3, "not doing enough"; code 1, "overstepping". General population, Germany.

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

Net ethical scores in detail, in Germany

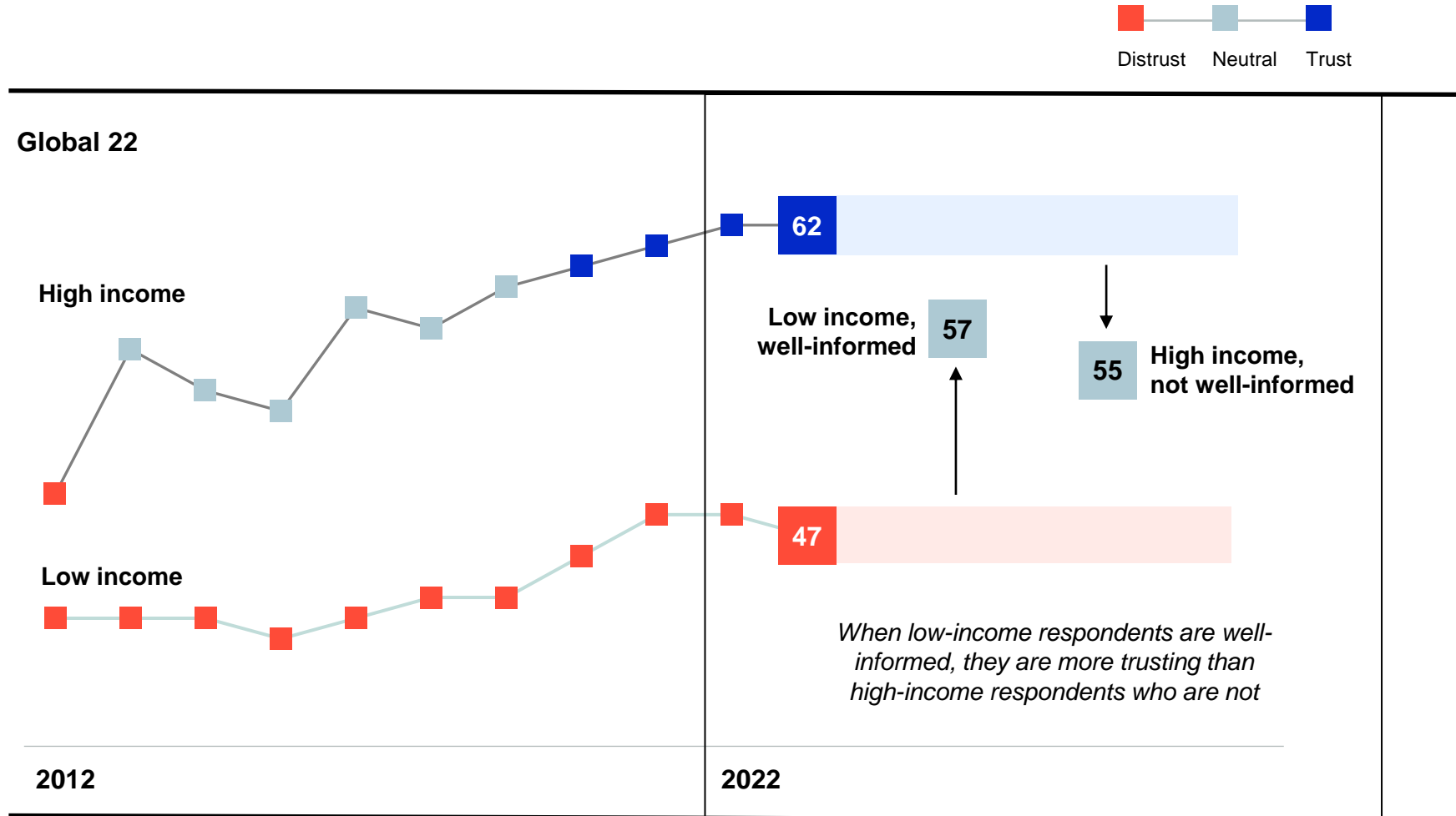
	Business Net score	Government Net score	Media Net score	NGOs Net score	
Effective	14pts	-7	19	20	<div>Highly effective agent of positive change</div> <div>vs</div> <div>Completely ineffective agent of positive change</div>
Visionary	5	-20	-7	14	<div>Has vision for the future I believe in</div> <div>vs</div> <div>Does not have a vision for the future I believe in</div>
Fair	-20	-19	10	6	<div>Serves the interests of everyone equally and fairly</div> <div>vs</div> <div>Serve the interests of only certain groups of people</div>

Watchout for business:
negative score for fairness



GOOD INFORMATION CAN HELP CLOSE THE SOCIETAL DIVIDE

Trust Index



Well-informed

regularly do the following:

Follow news regularly

- ☐ Consult 3+ news sources daily
- ☐ Read business and/or public policy news

Seek quality information

- ☐ Consult news sources with which they disagree
- ☐ Check information against multiple sources

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.

INFORMATION QUALITY NOW MOST POWERFUL TRUST BUILDER ACROSS INSTITUTIONS

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

Business	% pt gain	NGOs	% pt gain	Government	% pt gain	Media	% pt gain
Information quality	3.0	Information quality	3.2	Information quality	6.1	Information quality	6.6
Hold others accountable	2.5	Exert power effectively	2.4	Take a leadership role	3.7	Communication and transparency	3.2
Communication and transparency	2.3	Work with other institutions and organizations	2.3	Exert power effectively	3.5	Exert power effectively	2.5
Exert power effectively	2.1	Take a leadership role	2.1	Long-term thinking and planning	3.2	Change management	2.2
Get results	1.8	Change management	2.0	Hold others accountable	3.2	Hold others accountable	2.0

2022 Edelman Trust Barometer. Regression analysis. CMP_ARE_[INS]. Thinking about [institution] as they are today, please indicate whether you consider each of the following dimensions to be one of their areas of strength or weakness. 5-point scale; top 2 box, strength. Question asked of half of the sample. 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, 24-mkt avg. For a full explanation of how this data was calculated, please see the Technical Appendix. Data not collected in China, Thailand and Russia for CMP_ARE_[INS].

RESTORING TRUST IS KEY TO SOCIETAL STABILITY

Business societal role is here to stay

People want more business leadership, not less.

Demonstrate tangible progress

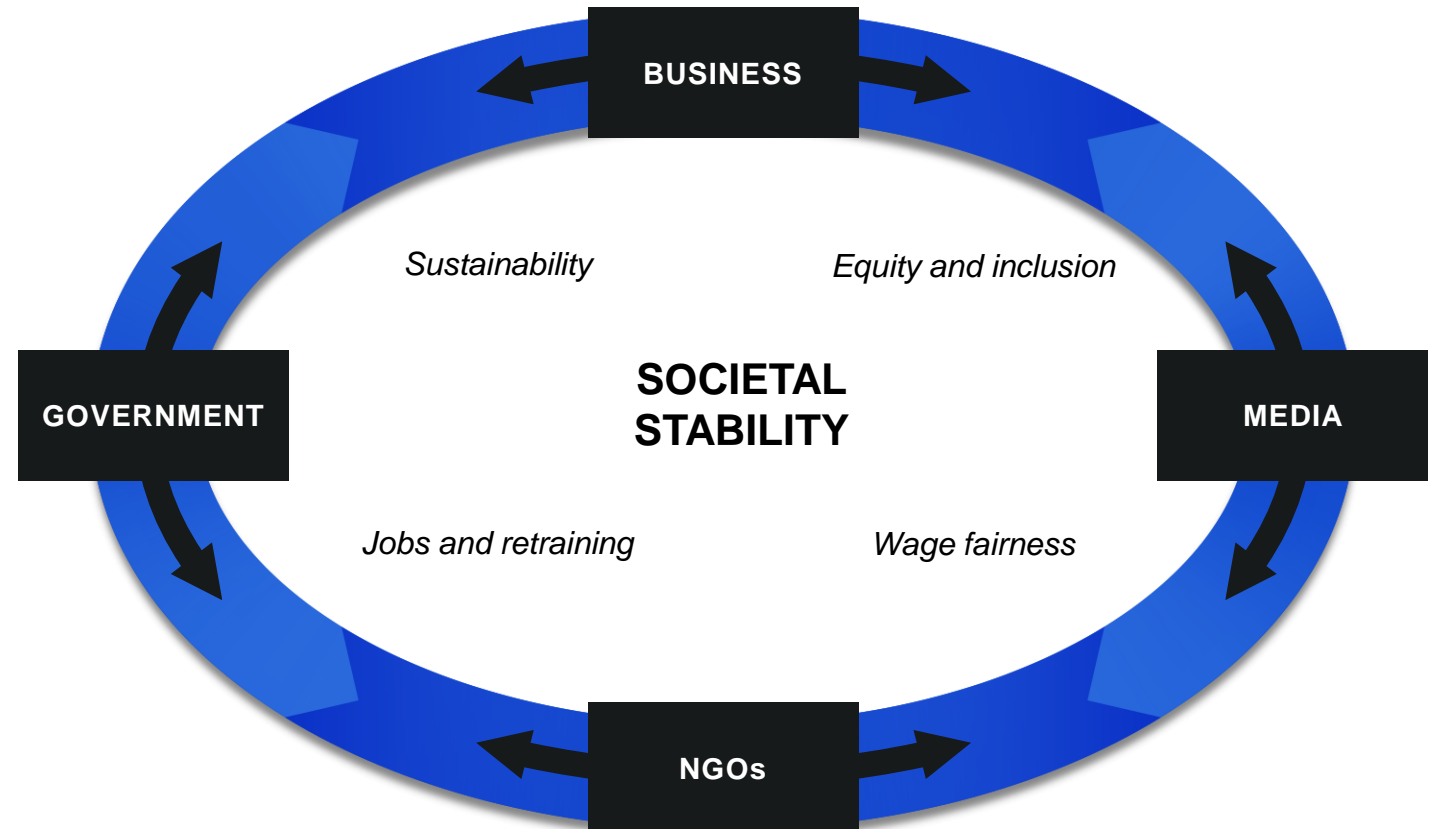
Restore belief in society's ability to build a better future: show the system works.

Leadership must focus on long-term thinking

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

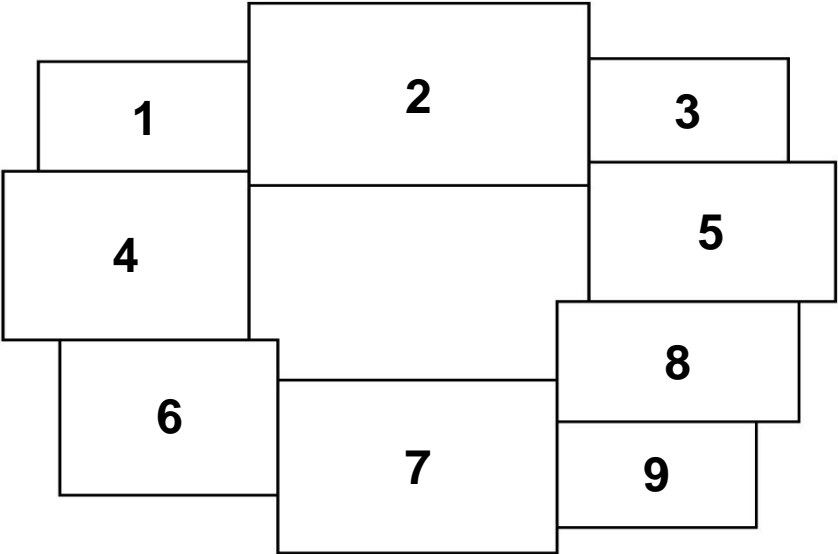
Every institution must provide trustworthy information

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



COVER IMAGE CREDITS

- 1. **New German Government Official Transfer:** *Sean Gallup via Getty Images*
- 2. **Trump Protest at Capitol:** *Bill Clark/CQ-Roll Call, Inc via Getty Images*
- 3. **Jeff Bezos' Blue Origin New Shepard Space Vehicle Flies The Billionaire And Other Passengers To Space:** *Joe Raedle via Getty Images*
- 4. **Defaced Mural Of Marcus Rashford Repaired By The Artist In Manchester:** *Christopher Furlong via Getty Images*
- 5. **The "Changci" Ship Blocking The Suez Canal Repaired Set Sail:** *Zhang Jingang/ Costfoto/Barcroft Media via Getty Images*
- 6. **Scene of Beijing ahead of 2022 Winter Olympics:** *Kyodo News vis Getty Images*
- 7. **Spain-US-Afghanistan-Conflict-Evacuation:** *Cristina Quicler/AFPvia Getty Images*
- 8. **Australia-Health-Virus-Protest:** *David Gray/AFP via Getty Images*
- 9. **Topshot-Greece-Fire:** *Angelos Tzortzinis/AFP via Getty Images*



DIVIDER IMAGE CREDITS

Slide 4 Government and Media Fuel a Cycle of Distrust

A photographer takes a picture as World Health Organization (WHO) Director-General Tedros Adhanom Ghebreyesus (on screen) speaks during a press conference on December 20, 2021 at the WHO headquarters in Geneva: *Fabrice Coffrini/AFP via Getty Images*

Slide 13 Failure of Leadership Makes Distrust the Default

Protestors hold placards that say Betrayed by my government during the demonstration: *Belinda Jiao/SOPA Images/LightRocket via Getty Images*)

Slide 20 Collapse of Trust in Democracies

Trump supporters stand on the U.S. Capitol Police armored vehicle as others take over the steps of the Capitol on Wednesday, Jan. 6, 2021, as the Congress works to certify the electoral college votes: *Bill Clark/CQ-Roll Call, Inc via Getty Images*

Slide 25 Societal leadership Now a Core Business Function

Employees install new solar panels at the Kalyon Energy's Karapinar Solar Power Plant on December 02, 2021 in Karapinar, Turkey: *Chris McGrath/Getty Images*

Slide 31 Breaking the Cycle of Distrust

The doctor gave the little girl a shot: *ViewStock via Getty Images*