

# 2023 Edelman Trust Barometer

Special Report:  
Trust and Health in Germany



# 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  |  <b>Germany</b> | Japan  | *Nigeria  | S. Korea |
| Canada | France | India  | Mexico | S. Africa | UK       |
|        |        |  |        |           | U.S.     |

### 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 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



# The Shifting Landscape of Health



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## 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

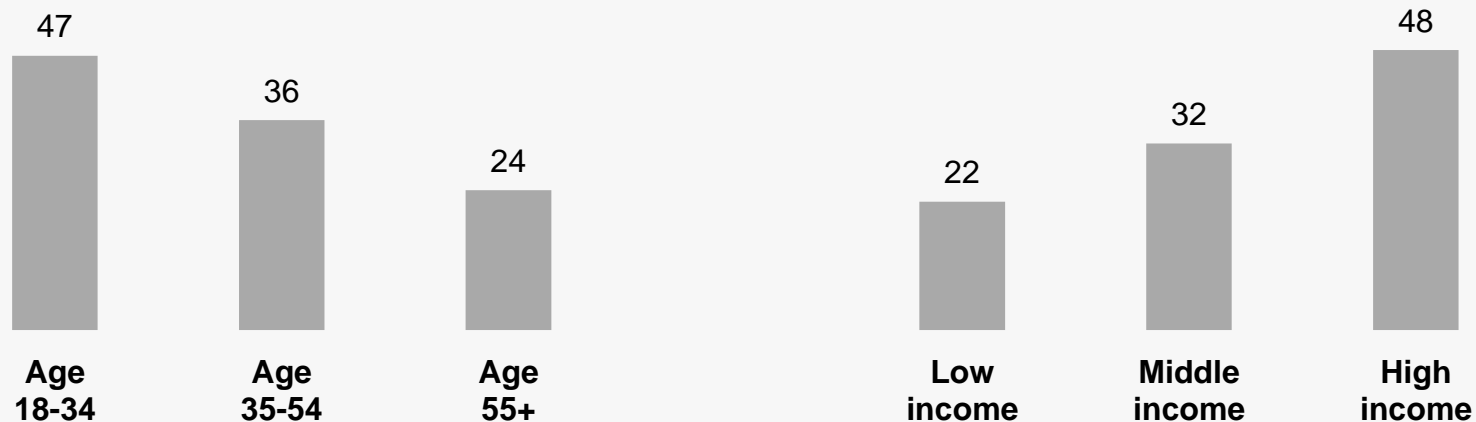


# Health Inequality: Low Income Far Less Likely to Report Good Health

Percent who say, in Germany

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

*Low-income people 26pts 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. |
|------------------------------|-----------|------------------|--------|-------|--------|---------|-------|-------|--------|----------|-----------|----------|----|------|
|                              |           | <b>Inflation</b> | 77     | 85    | 75     | 79      | 72    | 68    | 78     | 68       | 79        | 90       | 88 | 85   |
| <b>Pandemic restrictions</b> | 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.

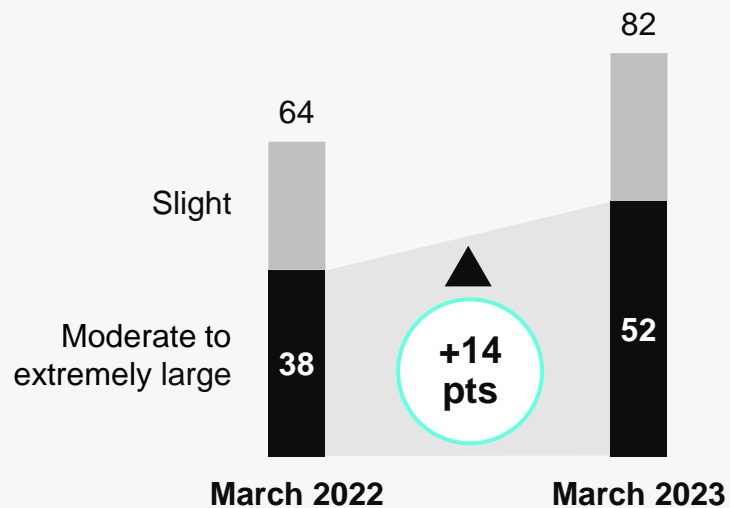


# It's Now Much Harder to Take Care of My Health

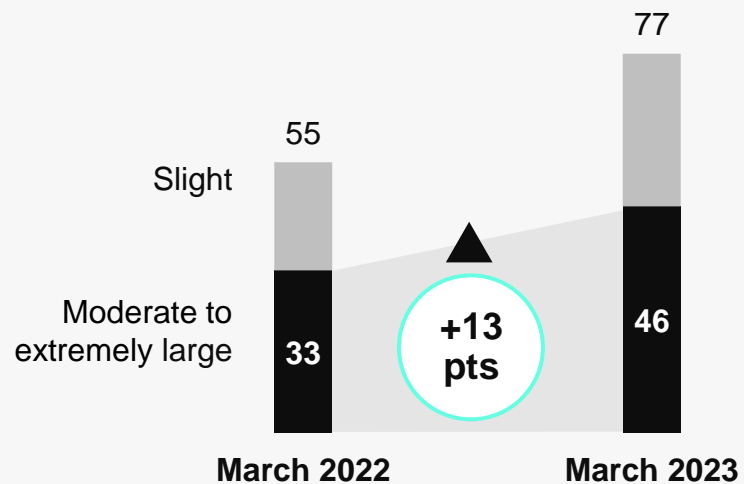
Percent who say

GLOBAL 9  Significant change

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



 Germany



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. and Germany. Data shown 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, in Germany

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

Net dimensions:

## Mental health

96%

- Feeling happy
- Can manage negative emotions

## Physical health

95%

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

## Social health

89%

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

## Community livability

87%

- Clean, safe, peaceful community
- Healthy planet

# 78%

say all four components are dimensions of my “health”

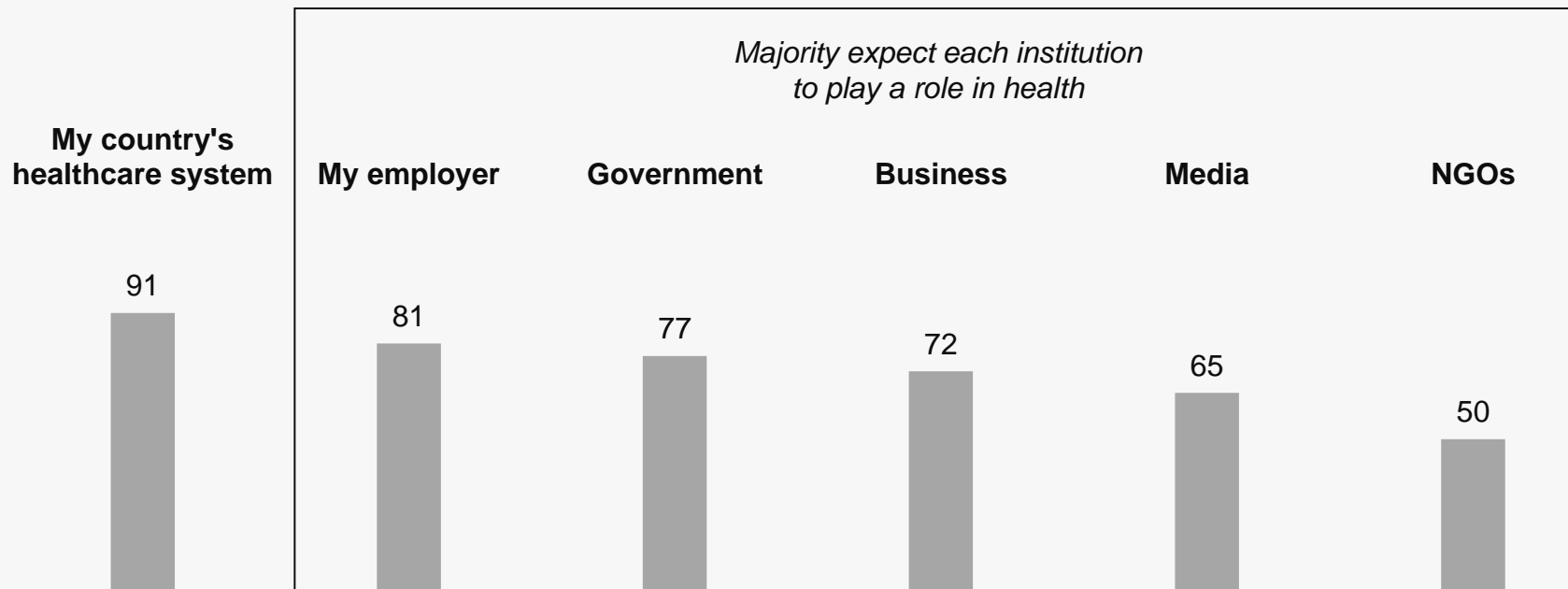
*Less than 1% say being healthy is just about physical health*



# Beyond the Healthcare System: All Institutions Expected to Keep Us Healthy

Percent who say, in Germany

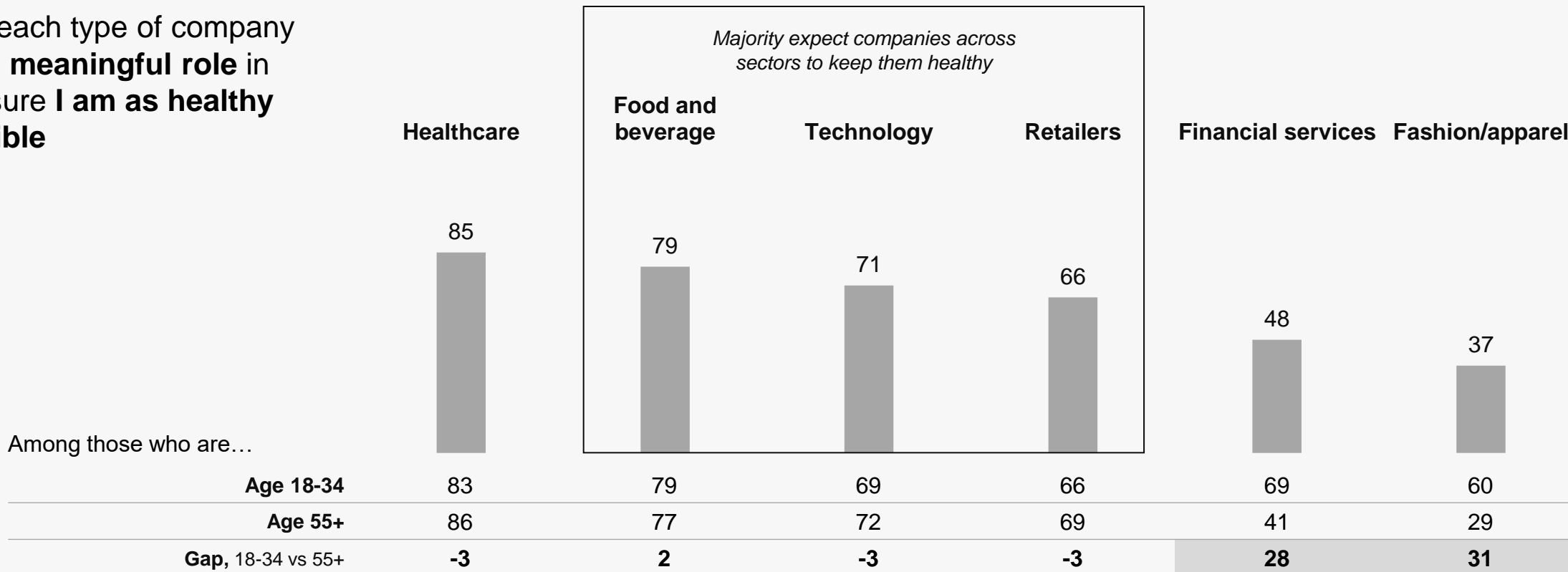
I expect each to **play a meaningful role** in making sure I am as healthy as possible



# Businesses Across Sectors Must Play a Meaningful Role in My Health

Percent who say, in Germany

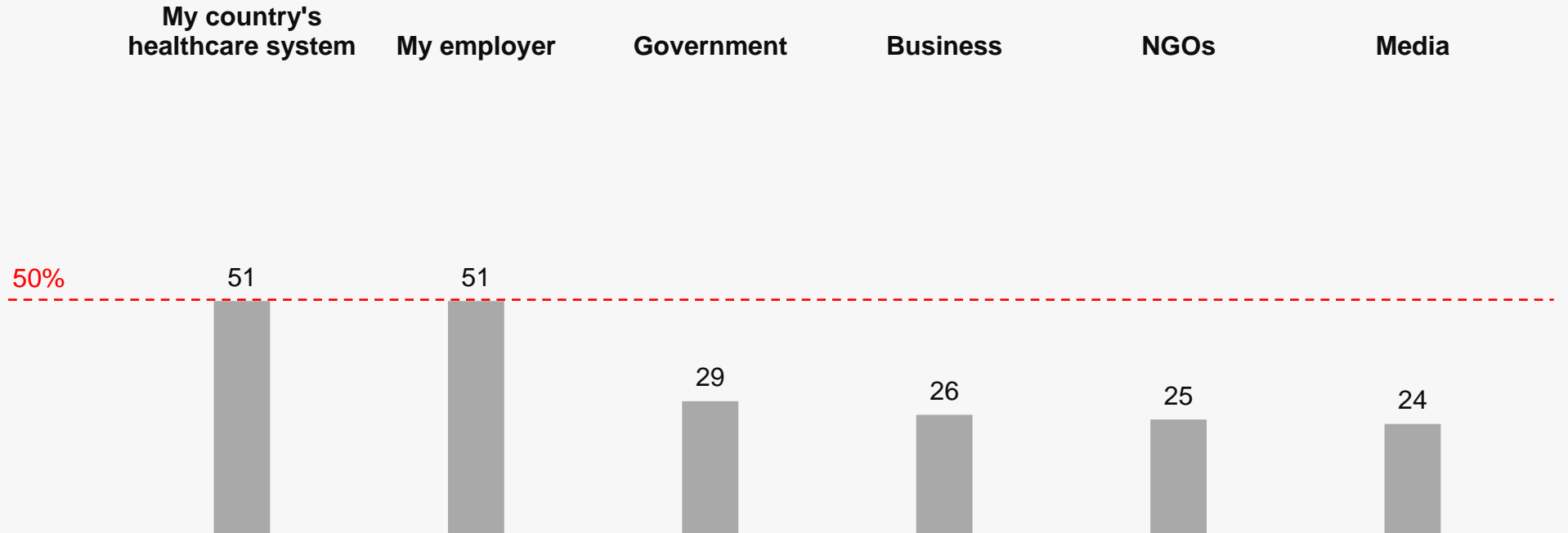
I expect each type of company to **play a meaningful role** in making sure I am as healthy as possible



# My Employer Seen as Doing Well on Health by Majority

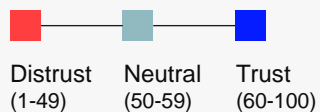
Percent who say, in Germany

This institution is **doing well**  
in making sure I am as  
**healthy as possible**

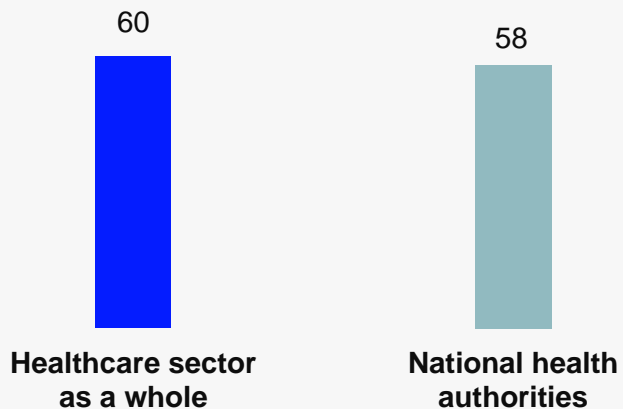


# In Germany, My Employer Only Non-Health Institution Trusted With Health

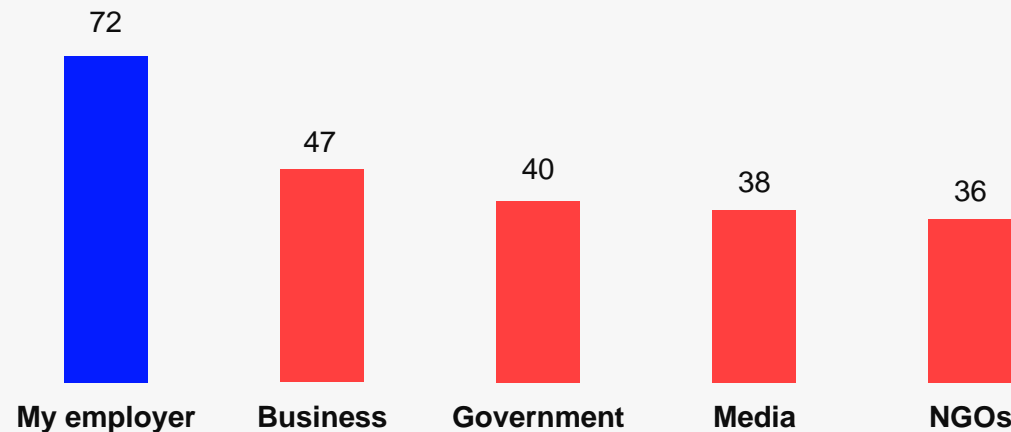
Percent who say, in Germany



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. "My employer" only asked among those employed by an organization (Q43/1). 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, Germany.

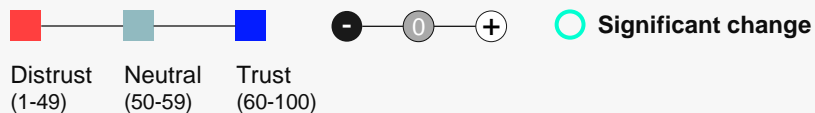


# Rise in Peer Voices and Empowered Patients

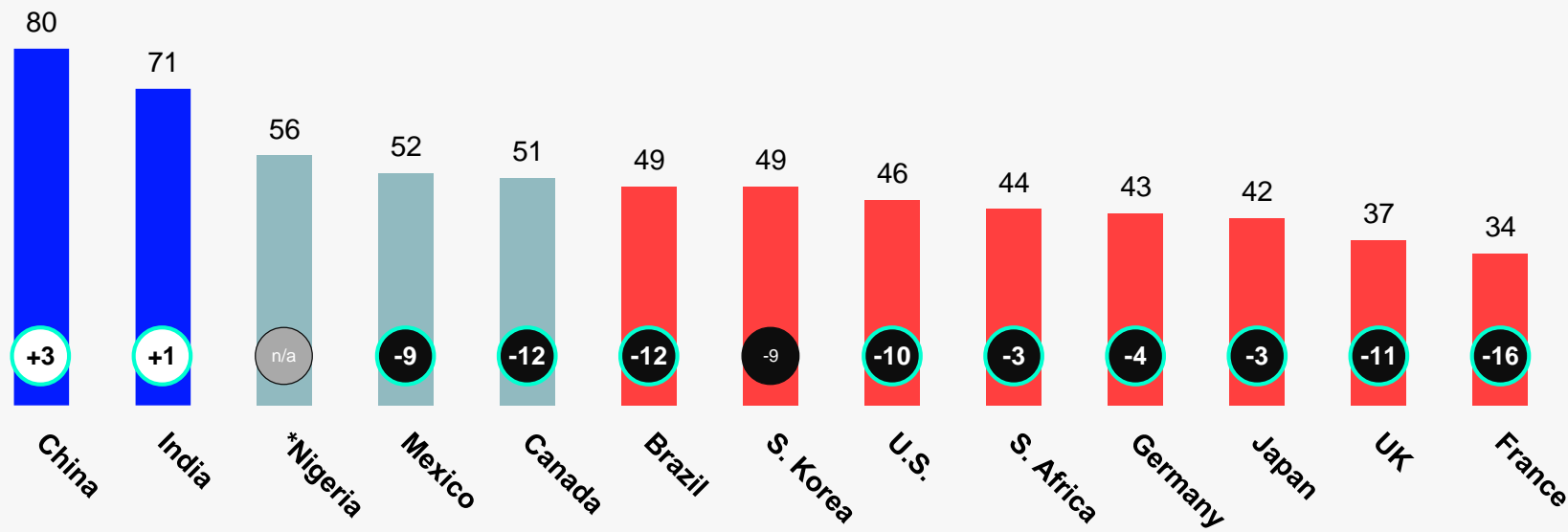
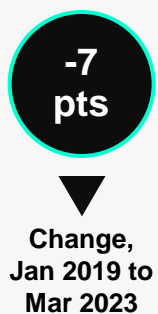


# Trust in the Media's Healthcare Reporting Falls Since 2019

Percent who say



I trust the media to report accurate information about healthcare



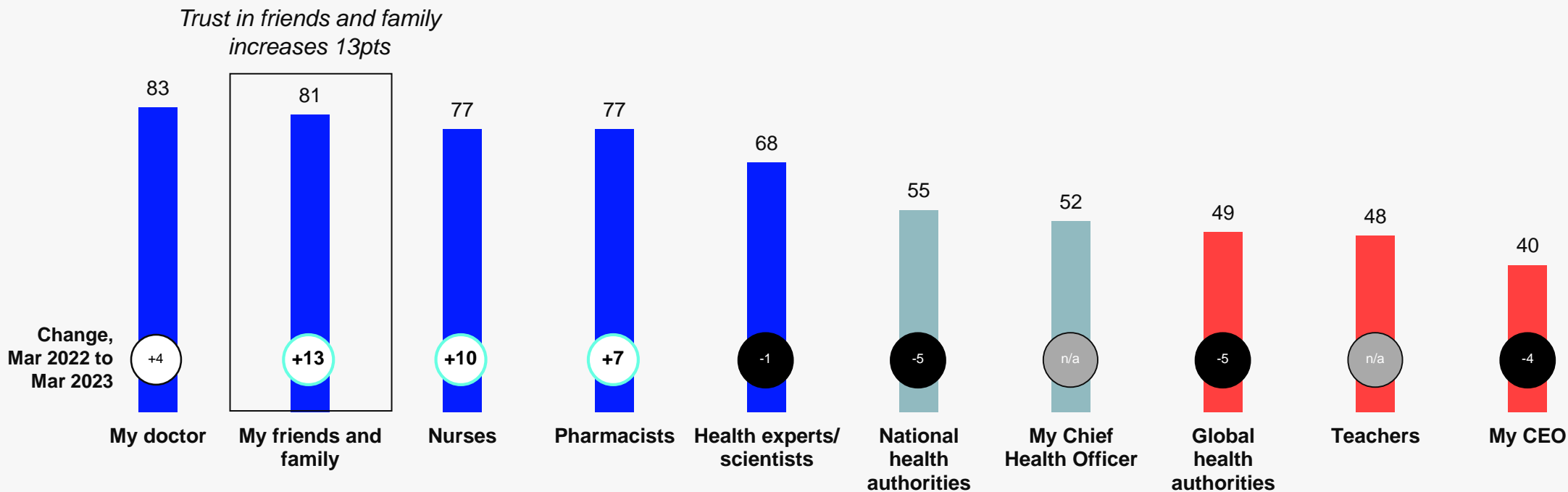
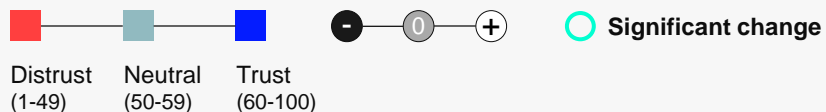
2023 Edelman Trust Barometer Special Report: Trust and Health. DRV\_HEA\_REP. How much do you trust the media to report accurate information about healthcare, such as diseases, treatments and prevention? 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 12-mkt avg. \*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.





# 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, in Germany



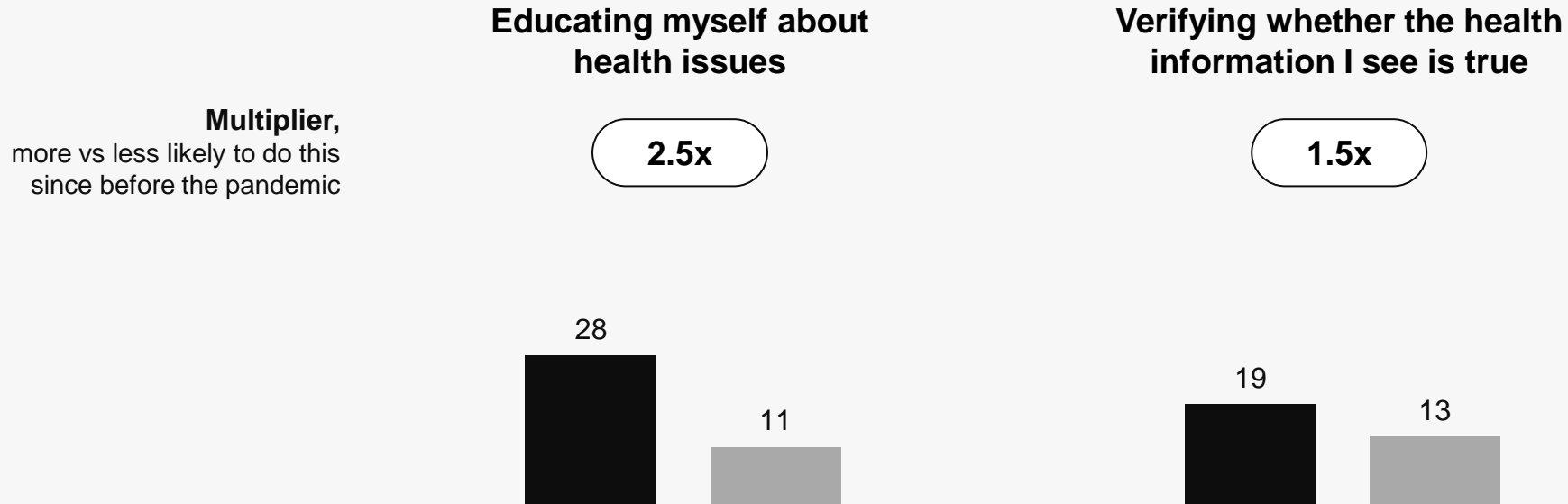
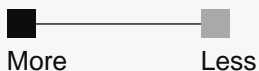
2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_TRU\_PEP. Below is a list of categories of people. For each one, please indicate how much you trust that group of people to tell you the truth about health issues and about how best to protect the health of the public. 9-point scale; top 4 box, trust. General population, Germany. "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.



# I'm Now Educating Myself More About Health

Percent who say, in Germany

Since before the beginning of the pandemic, I have been doing this more or less



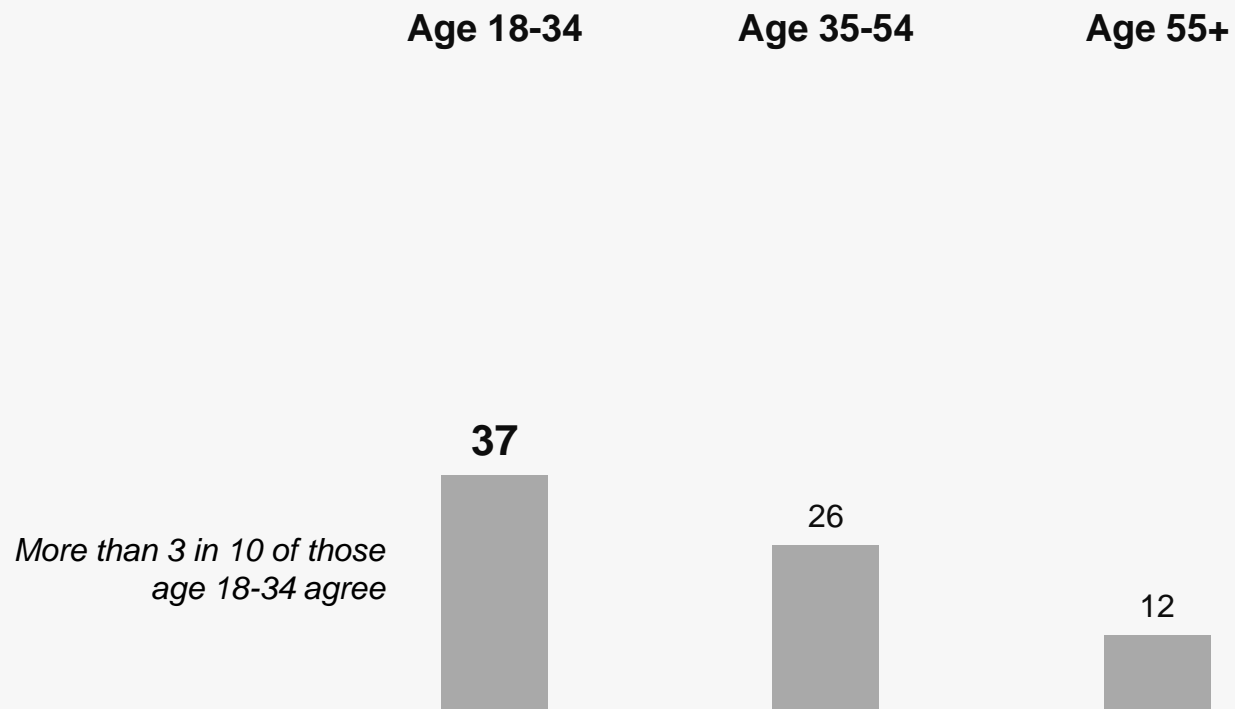
2023 Edelman Trust Barometer Special Report: Trust and Health. PAN\_EFF. For each of the following, please indicate whether you are doing this more, less, or the same amount as you were before the beginning of the pandemic. 3-pt scale; code 1, more, and code 2, less. Question asked of half the sample. General population, Germany. The multipliers are rounded to the nearest .5.



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

Percent who agree, in Germany

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

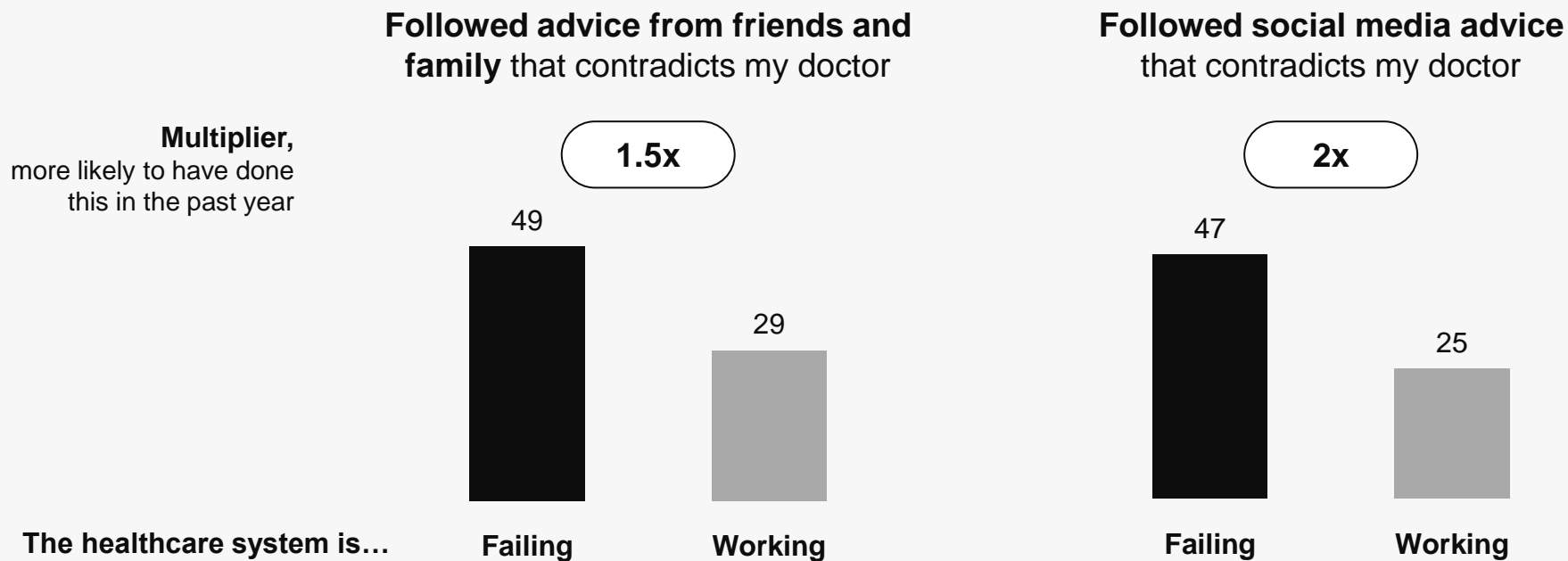


# To Follow Doctors, Empowered Patients Need Confidence in the Healthcare System

Among the 34% globally who agree the average person can be as knowledgeable as doctors, percent who say

GLOBAL 12

In the past year, I have...



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_BHV. Have you done any of the following within the past year? 3-point scale; code 1, yes. General population, 12-mkt avg., by belief in the healthcare system scale, among those who agree the average person who has done their own research is just as knowledgeable on most health matters as doctors (HEA\_AGR11/T4B). The multipliers are rounded to the nearest .5. For a complete definition of how we measured the belief in the healthcare system, please refer to our Technical Appendix.



# Build a Healthcare System I Can Trust



# To Drive Better Health Habits, Invest in Trust and Patient Relationships

Regression analysis: increase associated with each determinant

GLOBAL 12

## When respondents:

Increased likelihood to have  
**made a positive health change**  
such as diet or exercise  
(standardized across determinants)

Are highly educated

+5.6%

**Have a good relationship with their  
primary healthcare provider**

**+4.3%**

**Trust in the health ecosystem**

**+3.2%**

Are younger

+2.1%

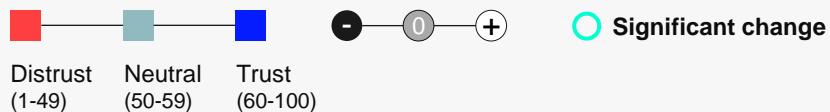
Have higher income

+1.7%



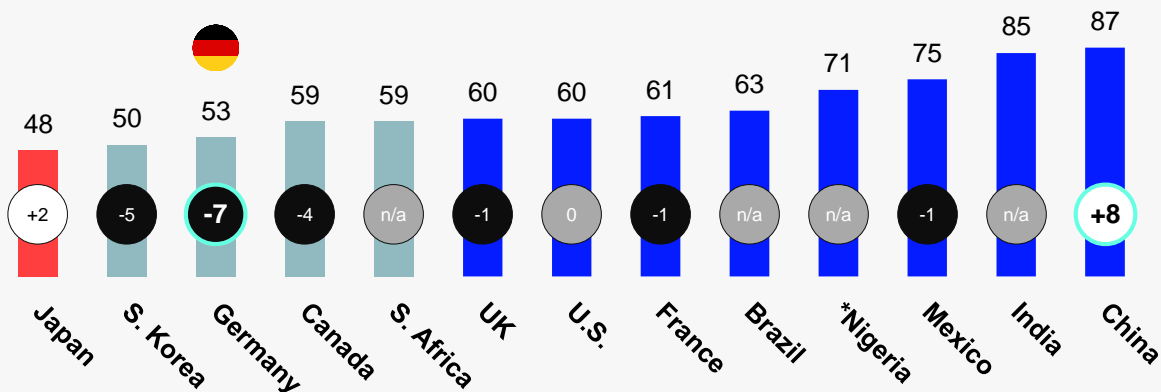
# Healthcare Companies: To Prevent Further Trust Declines, Convince Me You Will Do What Is Right

Percent who say

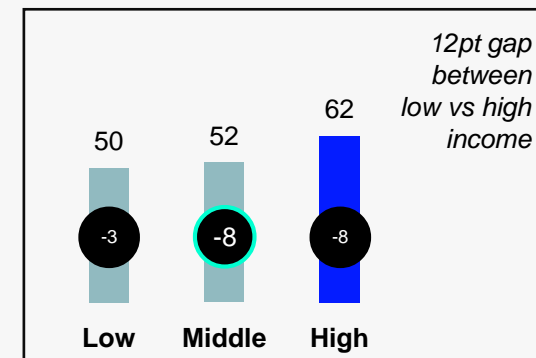
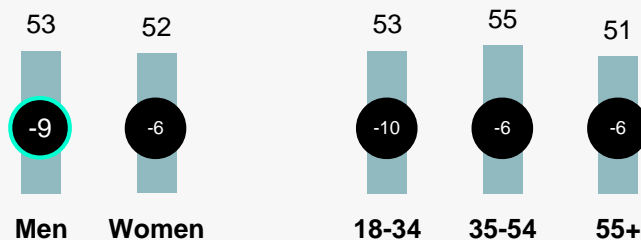


In general, I trust **healthcare companies** to do what is right

## Market



## Gender | Age | Income



Change, Mar 2022 to Mar 2023



# Providers: Treat Me With My Whole Self in Mind

Percent who say each is necessary to feel well cared for by a healthcare provider, in Germany

## Treat my medical needs (net)

- Give me medications I need*
- Follow up with me after seeing me*
- No long wait time*
- Not rushed through my appointment*

84%

## Ease my concerns (net)

- Listen to me, take my concerns seriously*
- Use terminology I can easily understand*
- Put me at ease if I am anxious*
- Do not make me feel judged*

79%

## Care about me as an individual (net)

- Understand the health concerns of people like me*
- Recommendations are compatible with my life*
- Ask questions about my life*

65%





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

Percent who say, in Germany

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*

**59%**

## Show how it fits my life

*Acknowledge the burden the recommended change may present in my life*

**69%**

## Give me a voice

*Give me a way to ask questions and voice my concerns*

**75%**



# 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<br><b>lower trust</b><br>in the health ecosystem |  | Among those with<br><b>higher trust</b><br>in the health ecosystem |
|---|--|--|
| Friends and family  | <b>Most trusted source</b><br>of health information      | My doctor  |
| My employer   | <b>Most believable channel</b><br>for health information | National health authorities  |
| Show credentials<br><i>and</i><br>Let me ask questions            | <b>Most convincing</b><br>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.



# CEOs and Employers: Invest in Our Health

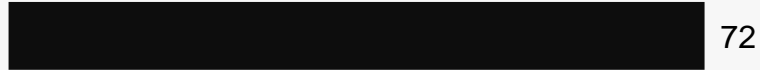


# Business: Address the Societal Factors That Affect Our Health

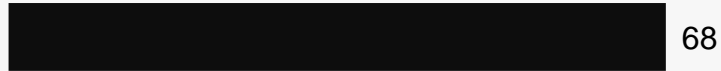
Percent who say, in Germany

To improve people's health,  
business must:

Provide **trustworthy health information**



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



Improve health of your **local communities**



**Convene stakeholders** to improve healthcare



# Brands: Optimize For Health Across Your Products and Operations

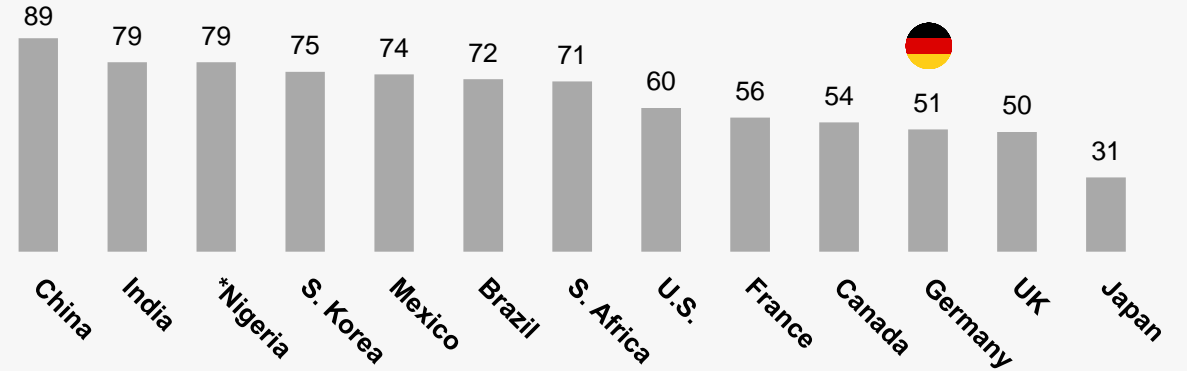
Percent who say

When deciding which brands to buy, I consider the **impact the brand, its products, and its business practices** have on people's health

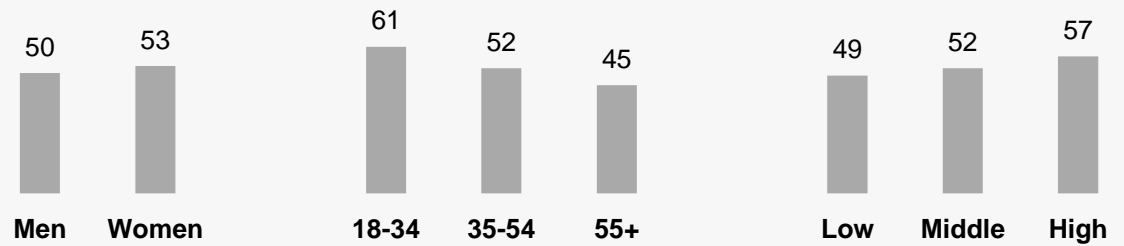
GLOBAL 12

# 64%

Market



Gender | Age | Income



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_DR\_BUY. When deciding which brands to buy, how often do you take into consideration the impact that the brand, its products, and its business practices are having on people's health, including your own, its employees, and the communities in which the brand operates? 5-point scale; top 3 box, sometimes/usually/always. General population, 12-mkt avg., and by Germany demographics. \*Nigeria is not included in the global average.



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

Percent of employees who say, in Germany

To improve their employees' health:

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

**66%**

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

**62%**

My employer must implement policies to **prevent burnout**

**77%**



# Special Report: Trust and Health

**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**

## Invest in employee health

Employees benefit greatly when their employers invest in their wellbeing. Make this part of your talent strategy, especially for early career and front-line team members.

**4**

## Optimize business around health

Health has a bottom-line impact on consumer decisions for businesses across all sectors. Make health central to your products and business operations.



# Supplemental Data: Trust and Health

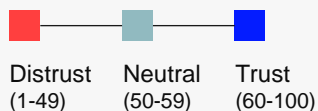




# Do We Trust Institutions With Our Health?

## Market Findings

Percent who say



|   | Global 12 | Brazil | Canada | China | France | Germany | India | Japan | Mexico | *Nigeria | S. Africa | S. Korea | UK | U.S. |
|---|-----------|--------|--------|-------|--------|---------|-------|-------|--------|----------|-----------|----------|----|------|
| <b>I trust this institution to do what is right when it comes to addressing health-related needs and concerns</b> |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| <b>My employer</b>  | 72        | 78     | 70     | 87    | 67     | 72      | 91    | 57    | 77     | 69       | 71        | 54       | 64 | 73   |
| <b>Business</b>   | 56        | 57     | 50     | 88    | 45     | 47      | 88    | 47    | 66     | 64       | 53        | 41       | 42 | 49   |
| <b>NGOs</b>   | 56        | 56     | 52     | 84    | 50     | 36      | 87    | 40    | 66     | 71       | 58        | 50       | 44 | 48   |
| <b>Government</b>   | 47        | 42     | 51     | 89    | 37     | 40      | 84    | 33    | 50     | 39       | 23        | 40       | 35 | 43   |
| <b>Media</b>  | 46        | 41     | 48     | 80    | 35     | 38      | 77    | 33    | 58     | 49       | 40        | 30       | 30 | 36   |
| <b>I trust this institution to do what is right in general</b>  |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| <b>Healthcare sector as a whole</b>   | 69        | 61     | 71     | 88    | 72     | 60      | 86    | 62    | 65     | 65       | 58        | 66       | 73 | 65   |
| <b>National health authorities</b>  | 66        | 62     | 68     | 93    | 61     | 58      | 89    | 56    | 63     | 63       | 51        | 59       | 72 | 60   |

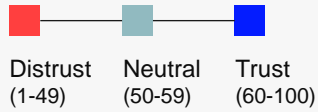
2023 Edelman Trust Barometer Special Report: Trust and Health. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. TRU\_INS\_HEA. Please indicate how much you trust each of the following to 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 the sample. "My employer" only asked among those employed by an organization (Q43/1). General population, 12-mkt avg. \*Nigeria is not included in the global average.



# Do We Trust Institutions With Our Health?

## Demographic Findings

Percent who say



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

|                    | Global 12 | Men | Women | Age 18-34 | Age 35-54 | Age 55+ | Low income | Middle income | High income |
|--------------------|-----------|-----|-------|-----------|-----------|---------|------------|---------------|-------------|
| <b>My employer</b> | 72        | 74  | 70    | 74        | 70        | 73      | 67         | 72            | 77          |
| <b>Business</b>    | 56        | 59  | 54    | 59        | 58        | 52      | 48         | 57            | 66          |
| <b>NGOs</b>        | 56        | 57  | 55    | 60        | 57        | 50      | 49         | 58            | 62          |
| <b>Government</b>  | 47        | 49  | 45    | 52        | 47        | 42      | 42         | 48            | 53          |
| <b>Media</b>       | 46        | 47  | 44    | 49        | 48        | 40      | 41         | 48            | 50          |

I trust this institution to do what is right in general

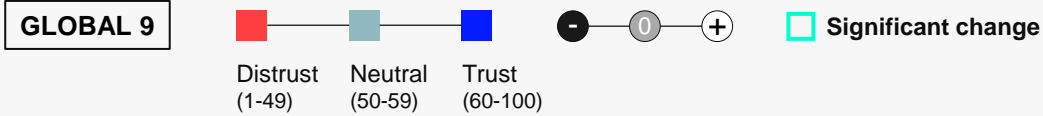
|                                     |    |    |    |    |    |    |    |    |    |
|-------------------------------------|----|----|----|----|----|----|----|----|----|
| <b>Healthcare sector as a whole</b> | 69 | 71 | 67 | 68 | 69 | 70 | 61 | 71 | 75 |
| <b>National health authorities</b>  | 66 | 67 | 65 | 67 | 66 | 65 | 61 | 67 | 71 |

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 the sample. "My employer" only asked among those employed by an organization (Q43/1). General population, 12-mkt avg, by gender, age and income.



# Do We Trust Companies Across Health Subsectors? Country Findings

Percent trust



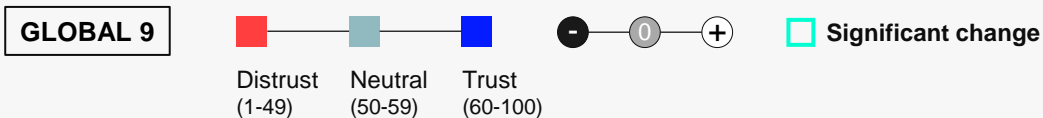
|  | Global 9 |     | Brazil |     | Canada |     | China |     | France |     | Germany |     | India |     | Japan |     | Mexico |     | *Nigeria |     | S. Africa |     | S. Korea |     | UK |     | U.S. |     |
|--|----------|-----|--------|-----|--------|-----|-------|-----|--------|-----|---------|-----|-------|-----|-------|-----|--------|-----|----------|-----|-----------|-----|----------|-----|----|-----|------|-----|
|  | %        | +/- | %      | +/- | %      | +/- | %     | +/- | %      | +/- | %       | +/- | %     | +/- | %     | +/- | %      | +/- | %        | +/- | %         | +/- | %        | +/- | %  | +/- | %    | +/- |
| <i>+/- Mar 2022 to Mar 2023</i>            |          |     |        |     |        |     |       |     |        |     |         |     |       |     |       |     |        |     |          |     |           |     |          |     |    |     |      |     |
| <b>Your local pharmacy</b>                 | 79       | 3   | 80     | -   | 82     | 2   | 90    | 7   | 85     | 7   | 84      | 4   | 88    | -   | 66    | -1  | 81     | -1  | 67       | -   | 78        | -   | 59       | -3  | 83 | 5   | 77   | 1   |
| <b>Hospitals</b>                           | 77       | 1   | 77     | -   | 79     | 1   | 92    | 5   | 81     | 5   | 72      | -1  | 87    | -   | 70    | -1  | 76     | -2  | 74       | -   | 63        | -   | 71       | 0   | 81 | 4   | 73   | 0   |
| <b>Private/government health insurance</b> | 67       | 0   | 58     | -   | 67     | -1  | 91    | 3   | 73     | 3   | 71      | 2   | 86    | -   | 67    | 3   | 59     | 0   | 55       | -   | 37        | -   | 68       | -3  | 52 | -2  | 57   | -2  |
| <b>Biotech/life sciences</b>               | 65       | 0   | 77     | -   | 61     | -1  | 89    | 6   | 62     | 3   | 57      | -3  | 89    | -   | 53    | 0   | 79     | -1  | 69       | -   | 62        | -   | 65       | 0   | 61 | 1   | 61   | 1   |
| <b>Health technology</b>                   | 65       | 0   | 76     | -   | 64     | -2  | 89    | 5   | 62     | 2   | 61      | -1  | 88    | -   | 50    | -1  | 75     | -1  | 76       | -   | 63        | -   | 60       | -3  | 62 | 0   | 63   | 3   |
| <b>Pharmaceuticals</b>                     | 62       | 1   | 67     | -   | 55     | -2  | 89    | 6   | 52     | 0   | 55      | -2  | 86    | -   | 63    | 3   | 74     | 0   | 73       | -   | 57        | -   | 56       | 0   | 60 | 1   | 54   | -1  |
| <b>Consumer health/over-the-counter</b>    | 61       | 0   | 57     | -   | 61     | -1  | 89    | 8   | 52     | 1   | 53      | -2  | 85    | -   | 52    | -1  | 67     | 0   | 64       | -   | 63        | -   | 53       | -5  | 61 | -1  | 61   | 3   |
| <b>Vitamin/natural supplements</b>         | 58       | -   | 70     | -   | 56     | -   | 89    | -   | 50     | -   | 47      | -   | 87    | -   | 44    | -   | 69     | -   | 76       | -   | 69        | -   | 51       | -   | 55 | -   | 60   | -   |

2023 Edelman Trust Barometer Special Report: Trust and Health. TRU\_SUB\_HEA. Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-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, 9-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



# Do We Trust Companies Across Health Subsectors? Demographic Findings

Percent trust



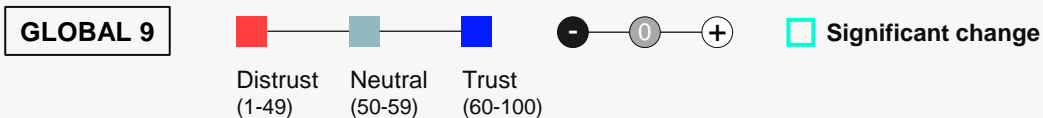
|  | Global 9 |     | Men |     | Women |     | Age 18-34 |     | Age 35-54 |     | Age 55+ |     | Low income |     | Middle income |     | High income |     |
|--|----------|-----|-----|-----|-------|-----|-----------|-----|-----------|-----|---------|-----|------------|-----|---------------|-----|-------------|-----|
|  | %        | +/- | %   | +/- | %     | +/- | %         | +/- | %         | +/- | %       | +/- | %          | +/- | %             | +/- | %           | +/- |
| <i>+/- Mar 2022 to Mar 2023</i>            |          |     |     |     |       |     |           |     |           |     |         |     |            |     |               |     |             |     |
| <b>Your local pharmacy</b>                 | 79       | 3   | 79  | 1   | 78    | 3   | 75        | 2   | 78        | 3   | 82      | 2   | 73         | 3   | 80            | 2   | 83          | 1   |
| <b>Hospitals</b>                           | 77       | 1   | 79  | 1   | 76    | 2   | 74        | 1   | 76        | 2   | 81      | 1   | 72         | 4   | 79            | 1   | 83          | 0   |
| <b>Private/government health insurance</b> | 67       | 0   | 69  | 0   | 65    | 0   | 66        | 0   | 67        | 1   | 68      | 0   | 60         | -1  | 70            | 1   | 72          | -1  |
| <b>Biotech/life sciences</b>               | 65       | 0   | 67  | 1   | 64    | 1   | 65        | 0   | 66        | 2   | 65      | 1   | 59         | 3   | 67            | 0   | 72          | -2  |
| <b>Health technology</b>                   | 65       | 0   | 67  | 0   | 64    | 2   | 65        | 0   | 65        | 0   | 65      | 1   | 58         | 1   | 67            | 0   | 72          | -2  |
| <b>Pharmaceuticals</b>                     | 62       | 1   | 63  | 0   | 61    | 1   | 64        | 2   | 62        | 1   | 60      | -2  | 56         | 2   | 64            | 1   | 67          | -3  |
| <b>Consumer health/over-the-counter</b>    | 61       | 0   | 62  | 0   | 60    | 1   | 62        | 2   | 63        | 1   | 58      | -1  | 55         | 3   | 63            | 0   | 66          | -4  |
| <b>Vitamin/natural supplements</b>         | 58       | -   | 57  | -   | 59    | -   | 62        | -   | 59        | -   | 53      | -   | 54         | -   | 60            | -   | 61          | -   |

2023 Edelman Trust Barometer Special Report: Trust and Health. TRU\_SUB\_HEA. Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Again, please use the same 9-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, 9-mkt avg, by gender, age and income. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



# Trust in People With Our Health Country Findings

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



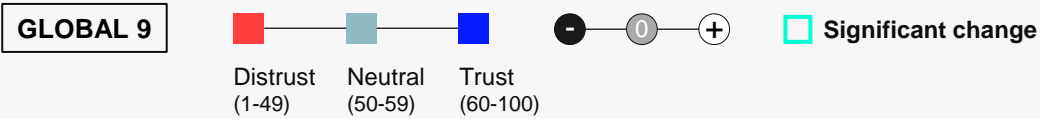
|                                    | Global 9 |     | Brazil |     | Canada |     | China |     | France |     | Germany |     | India |     | Japan |     | Mexico |     | *Nigeria |     | S. Africa |     | S. Korea |     | UK |     | U.S. |     |
|------------------------------------|----------|-----|--------|-----|--------|-----|-------|-----|--------|-----|---------|-----|-------|-----|-------|-----|--------|-----|----------|-----|-----------|-----|----------|-----|----|-----|------|-----|
|                                    | %        | +/- | %      | +/- | %      | +/- | %     | +/- | %      | +/- | %       | +/- | %     | +/- | %     | +/- | %      | +/- | %        | +/- | %         | +/- | %        | +/- | %  | +/- | %    | +/- |
| <b>+/- Mar 2022 to Mar 2023</b>    |          |     |        |     |        |     |       |     |        |     |         |     |       |     |       |     |        |     |          |     |           |     |          |     |    |     |      |     |
| <b>My doctor</b>                   | 80       | 3   | 82     | -   | 84     | 2   | 88    | 6   | 85     | 7   | 83      | 4   | 91    | -   | 69    | 0   | 82     | 1   | 84       | -   | 80        | -   | 73       | 4   | 79 | 2   | 78   | -1  |
| <b>Nurses</b>                      | 79       | 4   | 81     | -   | 84     | 3   | 88    | 7   | 84     | 9   | 77      | 10  | 88    | -   | 69    | 2   | 80     | 2   | 79       | -   | 70        | -   | 67       | 0   | 82 | 3   | 80   | 2   |
| <b>Pharmacists</b>                 | 76       | 6   | 72     | -   | 80     | 5   | 88    | 8   | 81     | 10  | 77      | 7   | 86    | -   | 67    | 5   | 69     | 4   | 79       | -   | 74        | -   | 67       | 4   | 80 | 6   | 73   | 4   |
| <b>My friends and family</b>       | 76       | 11  | 74     | -   | 75     | 11  | 90    | 7   | 71     | 14  | 81      | 13  | 90    | -   | 63    | 9   | 78     | 13  | 77       | -   | 73        | -   | 73       | 12  | 76 | 9   | 74   | 12  |
| <b>Health experts/scientists</b>   | 74       | 1   | 81     | -   | 76     | 1   | 88    | 4   | 70     | 8   | 68      | -1  | 89    | -   | 65    | 2   | 83     | 0   | 82       | -   | 72        | -   | 72       | 2   | 76 | 0   | 68   | -2  |
| <b>National health authorities</b> | 64       | 0   | 63     | -   | 67     | -2  | 89    | 2   | 56     | 4   | 55      | -5  | 86    | -   | 57    | 1   | 60     | 2   | 66       | -   | 54        | -   | 57       | -4  | 68 | -3  | 61   | 2   |
| <b>Global health authorities</b>   | 61       | 0   | 62     | -   | 65     | -3  | 87    | 4   | 54     | 2   | 49      | -5  | 87    | -   | 49    | 7   | 69     | -5  | 76       | -   | 59        | -   | 57       | 1   | 59 | -5  | 55   | 0   |
| <b>Teachers</b>                    | 61       | -   | 76     | -   | 66     | -   | 87    | -   | 56     | -   | 48      | -   | 88    | -   | 38    | -   | 69     | -   | 72       | -   | 66        | -   | 57       | -   | 63 | -   | 64   | -   |
| <b>My Chief Health Officer</b>     | 60       | -   | 74     | -   | 58     | -   | 86    | -   | 53     | -   | 52      | -   | 87    | -   | 43    | -   | 69     | -   | 73       | -   | 65        | -   | 52       | -   | 57 | -   | 61   | -   |
| <b>My CEO</b>                      | 56       | 2   | 67     | -   | 55     | 3   | 85    | 5   | 46     | 0   | 40      | -4  | 83    | -   | 44    | 2   | 67     | 4   | 60       | -   | 61        | -   | 45       | 4   | 51 | 0   | 60   | 1   |

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.



# Trust in People With Our Health Demographic Findings

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



|                                    | Global 9 |     | Men |     | Women |     | Age 18-34 |     | Age 35-54 |     | Age 55+ |     | Low income |     | Middle income |     | High income |     |  |
|------------------------------------|----------|-----|-----|-----|-------|-----|-----------|-----|-----------|-----|---------|-----|------------|-----|---------------|-----|-------------|-----|--|
|                                    | %        | +/- | %   | +/- | %     | +/- | %         | +/- | %         | +/- | %       | +/- | %          | +/- | %             | +/- | %           | +/- |  |
| <b>+/- Mar 2022 to Mar 2023</b>    |          |     |     |     |       |     |           |     |           |     |         |     |            |     |               |     |             |     |  |
| <b>My doctor</b>                   | 80       | 3   | 81  | 2   | 80    | 5   | 73        | 3   | 79        | 3   | 87      | 3   | 74         | 5   | 81            | 2   | 85          | 1   |  |
| <b>Nurses</b>                      | 79       | 4   | 80  | 4   | 78    | 4   | 72        | 2   | 79        | 6   | 85      | 5   | 74         | 5   | 80            | 4   | 84          | 3   |  |
| <b>Pharmacists</b>                 | 76       | 6   | 77  | 6   | 75    | 6   | 70        | 5   | 76        | 7   | 81      | 6   | 71         | 7   | 77            | 6   | 80          | 5   |  |
| <b>My friends and family</b>       | 76       | 11  | 76  | 11  | 75    | 11  | 70        | 7   | 77        | 10  | 78      | 15  | 70         | 11  | 77            | 10  | 79          | 10  |  |
| <b>Health experts/scientists</b>   | 74       | 1   | 74  | 0   | 74    | 3   | 70        | 0   | 73        | 2   | 77      | 2   | 69         | 3   | 75            | 1   | 79          | 0   |  |
| <b>National health authorities</b> | 64       | 0   | 65  | 0   | 62    | 0   | 61        | -3  | 64        | 1   | 65      | 1   | 58         | -1  | 65            | 0   | 69          | 0   |  |
| <b>Global health authorities</b>   | 61       | 0   | 61  | 0   | 60    | -1  | 61        | -4  | 61        | 0   | 60      | 2   | 55         | 0   | 62            | 0   | 67          | -1  |  |
| <b>Teachers</b>                    | 61       | -   | 61  | -   | 61    | -   | 60        | -   | 64        | -   | 59      | -   | 54         | -   | 63            | -   | 65          | -   |  |
| <b>My Chief Health Officer</b>     | 60       | -   | 61  | -   | 58    | -   | 60        | -   | 58        | -   | 62      | -   | 53         | -   | 61            | -   | 63          | -   |  |
| <b>My CEO</b>                      | 56       | 2   | 57  | 1   | 54    | 2   | 56        | 1   | 55        | 1   | 56      | 7   | 49         | 6   | 56            | 4   | 60          | -3  |  |

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, by gender, age and income. "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.



# Societal Factors Making Us Sick

## Demographic Findings

Percent who say

This issue **negatively impacts** my health (net<sup>\*\*</sup>)

| Top 8 of 13                  | GLOBAL 12 | Men | Women | Age 18-34 | Age 35-54 | Age 55+ | Low income | Middle income | High income |
|------------------------------|-----------|-----|-------|-----------|-----------|---------|------------|---------------|-------------|
| <b>Inflation</b>             | 77        | 76  | 77    | 81        | 81        | 68      | 80         | 76            | 73          |
| <b>Pandemic restrictions</b> | 75        | 74  | 76    | 81        | 76        | 68      | 77         | 75            | 74          |
| Lack of trust                | 67        | 67  | 67    | 76        | 71        | 55      | 71         | 67            | 65          |
| Pollution                    | 67        | 66  | 67    | 76        | 68        | 57      | 68         | 68            | 64          |
| Polarization                 | 66        | 66  | 65    | 74        | 67        | 57      | 69         | 65            | 65          |
| Climate change               | 65        | 64  | 65    | 73        | 65        | 56      | 68         | 65            | 63          |
| Burnout                      | 64        | 63  | 66    | 79        | 70        | 45      | 67         | 65            | 62          |
| Misinformation               | 64        | 65  | 63    | 75        | 65        | 53      | 66         | 64            | 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, by gender, age and income. <sup>\*\*</sup>Data shown is a net of codes 1-4; physical health, mental health, health of my relationships, livability of my community.



# Dimensions of Health Country Findings

Percent who say

## GLOBAL 12

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

|                                       | Global 12 | Brazil | Canada | China | France | Germany | India | Japan | Mexico | *Nigeria | S. Africa | S. Korea | UK | U.S. |
|---------------------------------------|-----------|--------|--------|-------|--------|---------|-------|-------|--------|----------|-----------|----------|----|------|
| <b>Physical health (net)</b>          |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| • Can do important activities         | 88        | 94     | 86     | 75    | 94     | 95      | 83    | 84    | 93     | 88       | 91        | 91       | 88 | 83   |
| • No sickness or injury               |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| • Can manage my physical health       |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| <b>Mental health (net)</b>            |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| • Feeling happy                       | 91        | 96     | 88     | 84    | 97     | 96      | 91    | 84    | 96     | 94       | 94        | 94       | 88 | 88   |
| • Can manage negative emotions        |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| <b>Social health (net)</b>            |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| • Have a person I can speak freely to | 83        | 93     | 78     | 73    | 92     | 89      | 85    | 62    | 90     | 85       | 88        | 89       | 75 | 79   |
| • People care about me                |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| • Not discriminated against           |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| <b>Community livability (net)</b>     |           |        |        |       |        |         |       |       |        |          |           |          |    |      |
| • Clean, safe, peaceful community     | 79        | 91     | 71     | 66    | 89     | 87      | 81    | 66    | 90     | 82       | 86        | 84       | 69 | 73   |
| • Healthy planet                      |           |        |        |       |        |         |       |       |        |          |           |          |    |      |

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.





# Dimensions of Health

## Demographic Findings

Percent who say

GLOBAL 12

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

|                                       | Global 12 | Men | Women | Age 18-34 | Age 35-54 | Age 55+ | Low income | Middle income | High income |
|---------------------------------------|-----------|-----|-------|-----------|-----------|---------|------------|---------------|-------------|
| <b>Physical health (net)</b>          |           |     |       |           |           |         |            |               |             |
| • Can do important activities         | 88        | 88  | 89    | 85        | 88        | 91      | 87         | 88            | 89          |
| • No sickness or injury               |           |     |       |           |           |         |            |               |             |
| • Can manage my physical health       |           |     |       |           |           |         |            |               |             |
| <b>Mental health (net)</b>            |           |     |       |           |           |         |            |               |             |
| • Feeling happy                       | 91        | 91  | 92    | 92        | 92        | 90      | 90         | 92            | 92          |
| • Can manage negative emotions        |           |     |       |           |           |         |            |               |             |
| <b>Social health (net)</b>            |           |     |       |           |           |         |            |               |             |
| • Have a person I can speak freely to | 83        | 82  | 84    | 83        | 83        | 82      | 81         | 83            | 85          |
| • People care about me                |           |     |       |           |           |         |            |               |             |
| • Not discriminated against           |           |     |       |           |           |         |            |               |             |
| <b>Community livability (net)</b>     |           |     |       |           |           |         |            |               |             |
| • Clean, safe, peaceful community     | 79        | 77  | 81    | 78        | 80        | 80      | 79         | 79            | 80          |
| • Healthy planet                      |           |     |       |           |           |         |            |               |             |

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, by gender, age and income. “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.



# Technical Appendix



## 2023 Edelman Trust Barometer Special Report: Trust and Health

# Sample Size, Quotas and Margin of Error

| Market                       | Weighed Sample Size <sup>1</sup> | Unweighted Sample Size | Margin of Error – Total Sample <sup>2</sup> | Margin of Error – Half Sample <sup>2</sup> | Quotas Set On <sup>3</sup>     |
|------------------------------|----------------------------------|------------------------|---|--|--------------------------------|
| <b>Global 12<sup>4</sup></b> | 12,000                           | 11,980                 | +/- 1.1 percentage points total sample      | +/- 1.6 percentage points half sample      | Quotas set at the market level |
| <b>Brazil</b>                | 1,000                            | 1,000                  | +/- 4.1 pct pts. total sample               | +/- 5.8 pct pts. half sample               | Age, Gender, Region            |
| <b>Canada</b>                | 1,000                            | 1,000                  |   |  |                                |
| <b>China<sup>5</sup></b>     | 1,000                            | 1,001                  |   |  |                                |
| <b>France</b>                | 1,000                            | 1,002                  |   |  |                                |
| <b>Germany</b>               | 1,000                            | 1,000                  |   |  |                                |
| <b>India</b>                 | 1,000                            | 1,000                  |   |  |                                |
| <b>Japan</b>                 | 1,000                            | 1,000                  |   |  |                                |
| <b>Mexico</b>                | 1,000                            | 999                    | +/- 4.6 pct pts. total sample               | +/- 6.4 pct pts. half sample               |                                |
| <b>Nigeria</b>               | 1,000                            | 805                    |   |  |                                |
| <b>S. Africa</b>             | 1,000                            | 1,000                  | +/- 4.1 pct pts. total sample               | +/- 5.8 pct pts. half sample               |                                |
| <b>S. Korea</b>              | 1,000                            | 976                    |   |  |                                |
| <b>UK</b>                    | 1,000                            | 1,002                  |   |  |                                |
| <b>U.S.</b>                  | 1,000                            | 1,000                  |   |  |                                |

1. Data reported on slides is weighted to the same total base size to ensure each market has an equal effect on the global total. Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.

2. Margin of error is calculated on the unweighted sample sizes collected, at the 99% confidence level.

3. There were additional quotas on ethnicity in the UK and U.S.

4. Nigeria was excluded from the Global average due to unstable respondent sample composition. It will be included once the composition stabilizes for two consecutive years.

5. All data collected in China is from the mainland. Regions of Greater China were not surveyed.



2023 Edelman Trust Barometer Special Report: Trust and Health

# Countries Included in the Various Global Averages

| 13 countries surveyed | Global 12 average              | Global 11<br>Excludes China  | Global 9                  |
|-----------------------|--------------------------------|--|---------------------------|
|                       | Used for current year averages | Used for current year averages;<br>excludes sensitive markets <sup>1</sup> | Used for tracking to 2022 |
| Brazil                | Brazil                         | Brazil   | -----                     |
| Canada                | Canada                         | Canada   | Canada                    |
| China                 | China                          | -----  | China                     |
| France                | France                         | France   | France                    |
| Germany               | Germany                        | Germany  | Germany                   |
| India                 | India                          | India  | -----                     |
| Japan                 | Japan                          | Japan  | Japan                     |
| Mexico                | Mexico                         | Mexico   | Mexico                    |
| Nigeria               | -----                          | -----  | -----                     |
| S. Africa             | S. Africa                      | S. Africa  | -----                     |
| S. Korea              | S. Korea                       | S. Korea   | S. Korea                  |
| UK                    | UK                             | UK   | UK                        |
| U.S.                  | U.S.                           | U.S.   | U.S.                      |

1. Because some of the content we ask is deemed politically sensitive there are several countries where we take special precautions in order to avoid putting our respondents, or ourselves, in a position to break any local laws. We work closely with our sample partner and its legal team to identify which questions, and in what countries, we should refrain from asking. The country where we removed questions and/or answer options was China.



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## Survey Languages Used and Internet Penetration by Country

|                | Languages                          | Internet Penetration* |
|----------------|------------------------------------|-----------------------|
| <b>Global</b>  | -                                  | 83%                   |
| <b>Brazil</b>  | Portuguese                         | 83%                   |
| <b>Canada</b>  | Localized English, Canadian French | 93%                   |
| <b>China</b>   | Simplified Chinese                 | 70%                   |
| <b>France</b>  | French                             | 92%                   |
| <b>Germany</b> | German                             | 94%                   |
| <b>India</b>   | Localized English                  | 60%                   |

|                  | Languages                    | Internet Penetration* |
|------------------|------------------------------|-----------------------|
| <b>Japan</b>     | Japanese                     | 93%                   |
| <b>Mexico</b>    | Localized Spanish            | 77%                   |
| <b>Nigeria</b>   | Localized English            | 68%                   |
| <b>S. Africa</b> | Localized English, Afrikaans | 63%                   |
| <b>S. Korea</b>  | Korean                       | 97%                   |
| <b>UK</b>        | Localized English            | 95%                   |
| <b>U.S.</b>      | English, Localized Spanish   | 94%                   |

\*Data source: <http://www.internetworldstats.com/stats.htm> as of Jan. 5, 2023

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## How We Measured Belief in the Healthcare System

Ten attributes were examined to gauge respondents' perceptions of the healthcare system in terms of its fairness and effectiveness.

Respondents' perceptions were measured using a 9-point agree-disagree scale in which 1 = strongly disagree and 9 = strongly agree, with 5 being a neutral mid-point. An overall *Belief in the Healthcare System* score was calculated by taking a respondent's average score across the ten items displayed on the right.

Respondents were then categorized into one of three segments based their mean score:

- Those who averaged 6.00 or higher were classified as believing the ***system is failing***
- Those who averaged between 5.00 and 5.99 were labelled as ***uncertain***
- Those who averaged less than 5.00 were classified as believing the ***system is working***

### ***Respondents were asked:***

Please indicate how much you agree or disagree with the following statements.

### **Fairness items**

Racism within the healthcare sector is widespread and systemic

While the wealthy get quick access to healthcare, most people in this country struggle to get medical attention when they need it

There are two tiers of medical care available in this country. Leading-edge treatment and access to the best doctors for the wealthy, and a much lower quality of care for everyone else.

As regular people struggle to pay for and access healthcare, healthcare companies are making more profit than they should be

The people who run healthcare companies care more about profits than people

People are needlessly dying in this country because they cannot afford good healthcare

### **Effectiveness items**

The quality of healthcare available in our country today is the worst I have ever seen it

I deserve better healthcare than I am currently getting

The healthcare system in this country is broken beyond repair

I believe that our country's healthcare system is taking good care of me and my family (Reverse scored)



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## How We Measured Trust in the Health Ecosystem

In order to determine trust in the health ecosystem, we first had to understand what respondents consider to be the components of that ecosystem.

We identified those components using a factor analysis run across all of the healthcare-related institutional and people trust data from our survey. This analysis yielded four distinct groups of healthcare-related entities that define the ecosystem:

- Healthcare businesses
- Healthcare practitioners
- Global health authorities and NGOs
- Federal and local health authorities

The overall *Trust in the Healthcare Ecosystem* scale was built using the top four loading items from each of the four factors identified. This approach ensured that the final scale would equally represent the impact all four elements that comprise the ecosystem.

Respondents' levels of trust in each of the 16 entities described in the chart on the right were measured using a 9-point scale in which 1 = do not trust them at all and 9 = trust them a great deal. Their overall *Trust in the Healthcare Ecosystem* score was calculated by taking the respondent's average trust score across all 16 items.

We then divided respondents into equal thirds within each country. The upper one-third are those with highest trust in the health ecosystem, and the bottom one-third are those with lowest trust in the health ecosystem.

| Healthcare businesses   | Healthcare practitioners  |
|---|---|
| Biotech / life sciences companies <sup>2</sup><br>Consumer health / over-the-counter companies <sup>2</sup><br>Health technology companies <sup>2</sup><br>Pharmaceutical / drug companies <sup>2</sup> | Doctors <sup>3</sup><br>Your doctor / primary healthcare provider / pharmacist <sup>3</sup><br>Nurses <sup>3</sup><br>Your doctor or primary healthcare provider <sup>4</sup> |
| Global health authorities and NGOs  | Federal and local health authorities  |
| The WHO <sup>1</sup><br>Global health officials <sup>3</sup><br>Global health authorities <sup>4</sup><br>Heads of health NGOs <sup>4</sup>   | National health authorities <sup>1,3,4</sup><br>Local health officials <sup>3</sup>   |

1. TRU\_INS: trust in an institution to do what is right
2. TRU\_SUB\_HEA: trust in businesses in health industry subsectors to do what is right
3. TRU\_PEP: trust in people to do what is right
4. HEA\_TRU\_PEP: trust in people to tell you the truth about health issues and how best to protect the health of the public.



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## How We Calculated the Determinants of Good Health Behaviors

We used a *regression analysis* to identify drivers that increased the likelihood that respondents **started and maintained a positive health change, such as a diet or exercise routine.**

The analysis looked at trust in the health ecosystem, as well as additional factors that other research has found are important in predicting good health behaviors:

- Age
- Gender
- Income
- Level of education
- Quality of healthcare
- Trust in government
- Relationship with primary healthcare provider
- Trust in the health ecosystem

The results indicated that even after accounting for the traditional social determinants of health, trust in the health ecosystem is a top determinant of good health behaviors.

### Regression variables in detail:

1. Age:
  - 18-34
  - 35-54
  - 55+
2. Gender
  - Men
  - Women
3. Income
  - First quartile
  - Second quartile
  - Third quartile
  - Fourth quartile
4. Education
  - Less than a college degree
  - College degree or more
5. Quality of healthcare
  - Less than very good
  - Very good or better
6. Trust in government
  - Those who trust government (top 4 box trust, codes 6-9)
  - Those who do not trust government (codes 1-5, 99)
7. Relationship with primary healthcare provider
  - Those who have a good working relationship with their primary healthcare provider (top 4 box agree, codes 6-9)
  - Those who do not (codes 1-5, 99)
8. Trust in the health ecosystem
  - Lower 33%
  - Middle 33%
  - Upper 33%





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## How We Calculated the Determinants of Good Health Behaviors, Continued

The variables shown in the formula below were significant drivers of good health behaviors. Overall, 3.47% of the variance in adopting a positive health behavior is accounted for by this model.

$$\text{PositiveHealthChange} = (0.2883) + (0.0262)\text{age} + (.1111)\text{Education} + (.0152)\text{Income} + (.0911)\text{HCPRelationship} + (.0386)\text{TrustHealthEcosys}$$

The coefficient associated with each driver indicates the relative increase in the likelihood to adopt and maintain a positive health behavior when that variable increases by one unit.

Due to the variation in number of categories or levels across our driver variables, a standardized coefficient value (bStdX) was calculated. This coefficient allows us to rank the importance of each predictor variable relative to the others. Specifically, the number displayed in the third column of the table to the right is the predicted increase in the likelihood to adopt and maintain a positive health behavior associated with each variable increasing by one *standard deviation*.

| Linear regression             | Positive health change |        |         |
|-------------------------------|------------------------|--------|---------|
|                               | Coefficient            | p-val  | bStdX   |
| Age                           | 0.0262                 | 0.0013 | 0.0210  |
| Gender                        | -0.0151                | 0.2446 | -0.0076 |
| Education                     | 0.1111                 | 0.0000 | 0.0555  |
| Income                        | 0.0152                 | 0.0157 | 0.0166  |
| Quality of healthcare         | -0.0098                | 0.4909 | -0.0048 |
| Trust in government           | 0.0008                 | 0.9573 | 0.0004  |
| Relationship with HCP         | 0.0911                 | 0.0000 | 0.0433  |
| Trust in the health ecosystem | 0.0386                 | 0.0000 | 0.0316  |
| Constant                      | .2883                  |        |         |



**Full  
Question  
Text**



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Full Text For Answer Choices Abbreviated

## Inflation Tops List Of Societal Factors Making Us Sick

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.

| Shortened             | Full   |
|-----------------------|--|
| Inflation             | Inflation, financial insecurity, and economic uncertainty                                      |
| Pandemic restrictions | The past several years of COVID-19 pandemic restrictions                                       |
| Lack of trust         | The lack of trust among people in our society  |
| Pollution             | Pollution and the loss of natural habitat  |
| Polarization          | Political polarization making it more difficult to address the societal problems we are facing |
| Climate change        | Climate change   |
| Burnout               | Overwork or burnout  |
| Misinformation        | Misinformation spread on social media or other platforms                                       |



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Full Text For Answer Choices Abbreviated

## Biggest Barriers to Better Health: Cost and Information

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?

| Shortened                       | Full   |
|---------------------------------|--|
| Healthy options cost too much   | Healthy options and health-promoting products and activities cost more than I am willing to pay  |
| Cannot afford good healthcare   | I cannot afford to pay for good healthcare   |
| Cannot afford treatments        | I cannot afford to pay for some of the medications or medical devices that I need  |
| Lack of information             | A lack of information. I do not know how to go about taking better care of my health.  |
| Changing health recommendations | Health recommendations keep changing. One day something is considered healthy, and the next day the experts change their advice. When this happens, it makes me unsure about what I should be doing to stay healthy. |
| Contradictory expert advice     | Different health experts give contradictory advice. When this happens, it makes me unsure about my health decisions.   |



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Full Text For Answer Choices Abbreviated

## Dimensions of 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.

| Shortened                           | Full   |
|-------------------------------------|--|
| Feeling happy                       | Feeling confident in myself and happy with the direction my life is headed in  |
| Can manage negative emotions        | Rarely experiencing distress, anxiety, or other negative emotions in my life<br>Being able to manage negative emotions such as fear, anxiety, or stress<br>Being free of mental illness<br>Being able to manage any mental illnesses that I have |
| Can do important activities         | Having the energy to participate in activities that are important to me or bring me joy  |
| No sickness or injury               | Being free of sickness or injury   |
| Can manage my physical health       | Being able to manage any physical health conditions that I have  |
| Have a person I can speak freely to | Having at least one person in my life that I can speak to freely about my hopes, feelings, and emotions<br>Having a romantic relationship that is emotionally and physically fulfilling  |
| People care about me                | Having lots of friends<br>Feeling like other people care about me and that I matter to them  |
| Not discriminated against           | Feeling like I am not being constantly judged or discriminated against because of my culture or identity   |
| Clean, safe, peaceful community     | Feeling like I am living in a community that is clean, safe, and peaceful  |
| Healthy planet                      | Feeling like I am living on a healthy planet where human, plant, and animal life can flourish  |



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Full Text For Answer Choices Abbreviated

## Trust in Peer Voices Now on Par with Medical Experts

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.

| Shortened                   | Full  |
|-----------------------------|---|
| My doctor                   | Your doctor or primary healthcare provider                        |
| Nurses                      | Nurses  |
| My family and friends       | Your friends and family   |
| Pharmacists                 | Pharmacists   |
| Health experts/scientists   | Medical scientists and health experts                             |
| National health authorities | National health authorities                                       |
| Global health authorities   | Global health authorities   |
| Teachers                    | Teachers  |
| My Chief Health Officer     | Your company's Chief Health Officer                               |
| My CEO                      | The CEO or leader of the company / organization that you work for |



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Full Text For Answer Choices Abbreviated

# I'm Now Educating Myself More About Health

PAN\_EFF. For each of the following, please indicate whether you are doing this more, less, or the same amount as you were before the beginning of the pandemic.

| Shortened  | Full  |
|--|---|
| Educating myself about health issues                   | Educating myself about health and health issues               |
| Verifying whether the health information I see is true | Verifying whether the health information I see is true or not |



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Full Text For Answer Choices Abbreviated

# To Follow Doctors, Empowered Patients Need Confidence in the Healthcare System

HEA\_BHV. Have you done any of the following within the past year?

| Shortened  | Full  |
|--|---|
| Followed advice of friends and family that contradicts my doctor | Followed the medical advice or recommendation of a friend or family member even though it contradicted what your doctor or other healthcare provider told you |
| Followed social media advice that contradicts my doctor          | Followed medical advice you found on social media even though it contradicted what your doctor or other healthcare provider told you                          |





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Full Text For Answer Choices Abbreviated

# To Drive Better Health Habits, Invest in Trust and Patient Relationships

HEA\_BHV. Have you done any of the following within the past year?

**Shortened**

**Full**

Made a positive health change such as diet or exercise

Started and maintained a positive health change, such as a diet or exercise routine



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Full Text For Answer Choices Abbreviated

## Providers: Treat Me With My Whole Self in Mind

HEA\_CARE. Which, if any, of the following are necessary in order for you to feel like you are being well cared for by a healthcare provider? Select all that apply.

| Shortened  | Full   |
|--|--|
| Give me medications I need                       | I am given prescription medications when I need them   |
| Follow up with me after seeing me                | The healthcare provider follows up with me about my health concerns and issues after they have seen me   |
| No long wait time                                | I am seen by the healthcare provider without having to wait a long time  |
| Not rushed through my appointment                | I do not feel like I am being rushed through my appointment so the healthcare provider can get to their next patient as quickly as possible  |
| Listen to me, take my concerns seriously         | The healthcare provider listens to me, allows me to ask questions, and takes my health concerns seriously  |
| Use terminology I can easily understand          | The healthcare provider uses words and terminology that I can easily understand  |
| Put me at ease if I am anxious                   | The healthcare provider takes the time to put me at ease if I am feeling anxious or upset about my health condition  |
| Do not make me feel judged                       | The healthcare provider does not make me feel judged or ashamed of my health concerns or health status   |
| Understand the health concerns of people like me | The healthcare provider understands the particular health issues and concerns of people my age, gender or ethnicity  |
| Recommendations are compatible with my life      | I am given recommendations for lifestyle changes like a new diet, exercise, or stress management routine, that are compatible with my living situation, such as my finances and my work or caregiving responsibilities |
| Asks questions about my life                     | The healthcare provider asks me questions not just about my symptoms, but about my life in general   |



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Full Text For Answer Choices Abbreviated

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

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?

| Shortened  | Full   |
|--|--|
| Show me the recommendation was based on data collected from people like me | Show that the recommendation was developed based on data collected from people like me     |
| Acknowledge the burden the recommended change may present in my life       | Acknowledge the burden that the recommended behavioral change may present in my daily life |
| Give me a way to ask questions and voice my concerns                       | Give me a way to ask questions and voice my concerns about the recommendation              |



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Full Text For Answer Choices Abbreviated

## Bridging the Trust Divide: Embrace Peer Voices as Allies for Better Health

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?

| Shortened                   | Full  |
|-----------------------------|---|
| My employer                 | In a communication from my employer                       |
| National health authorities | In a communication put out by national health authorities |



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 Full Text For Answer Choices Abbreviated

## Business: Address the Societal Factors That Affect Our Health

HEA\_BUS\_ACT. How obligated do you believe businesses are to do each of the following to improve people’s health?

| Shortened   | Full  |
|---|---|
| Provide trustworthy health information              | Be a reliable source of trustworthy health information  |
| Address health issues such as climate or inequality | Urgently address major societal issues, such as climate change, that impact peoples' health and wellbeing                                 |
| Improve health of your local communities            | Work to improve the health of the communities in which they are headquartered   |
| Convene stakeholders to improve healthcare          | Bring key healthcare decision-makers together to discuss coordinated action and to develop strategies for improving the healthcare system |



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Full Text For Answer Choices Abbreviated

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

HEA\_EMP\_ACT. How obligated do you believe your employer is to do each of the following to improve their employees' health?

### Shortened

### Full

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

Have the CEO talk about the importance of mental health in the workplace

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

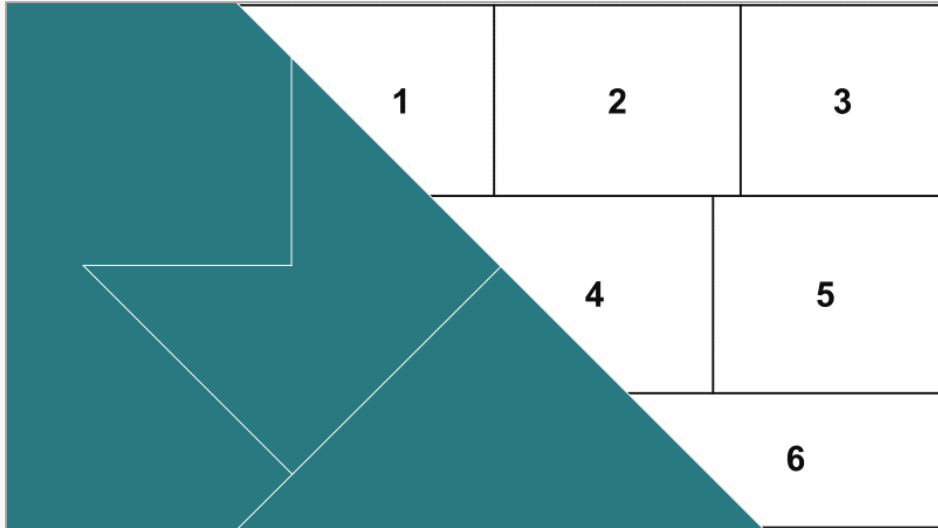
Ensure the CEO models healthy behavior, such as respecting boundaries between work hours and non-work hours and taking all of their paid time off

My employer must implement policies to prevent burnout

Put policies in place that help prevent overwork and employee burnout



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