

2023 Edelman Trust Barometer

Special Report:
Trust and Health in the U.S.



2023 Edelman Trust Barometer Special Report: Trust and Health

Methodology

Annual online survey in its 2nd year

Fieldwork conducted: Mar 2 – Mar 13, 2023

13

Countries

12,785

Respondents

1,000+/-

Respondents per country**

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

**The sample size varies by country from 805 to 1,002.
 12-market global data margin of error: General population +/- 1.1 percentage points (n=12,785)
 Country-specific data margin of error: General population +/- 4.1 to 4.6 percentage points (varies by country based on sample size, n=805 to n=1,002)
 Margin of error is calculated at the 99% confidence level

Global averages

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

GLOBAL 12

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

GLOBAL 11 Excludes China

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

Statistical significance

 **Significant change**

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

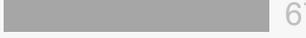
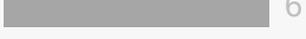
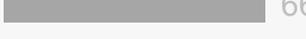
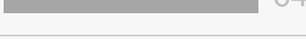
For more details on global averages and country-specific methodology, please refer to the Technical Appendix



Inflation Tops List of Societal Factors Making Us Sick

Percent who say

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

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

Polarization #2 issue negatively impacting health in U.S.



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.

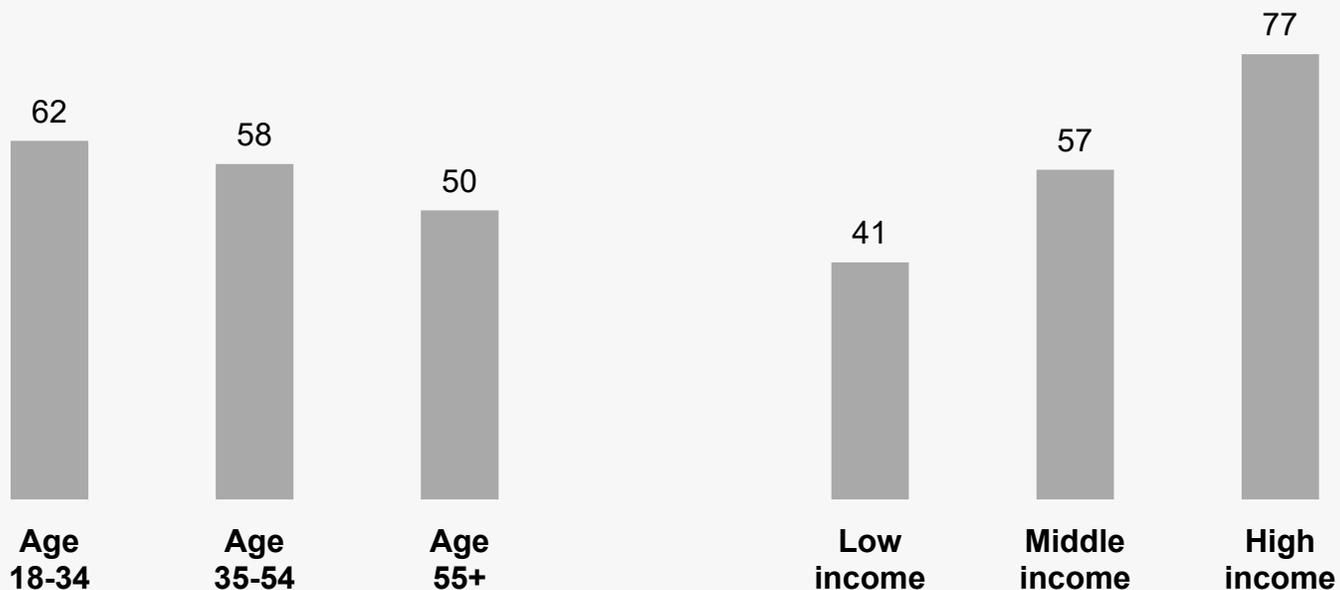


Low Income Far Less Likely to Report Good Health and We All Find Health Harder to Achieve

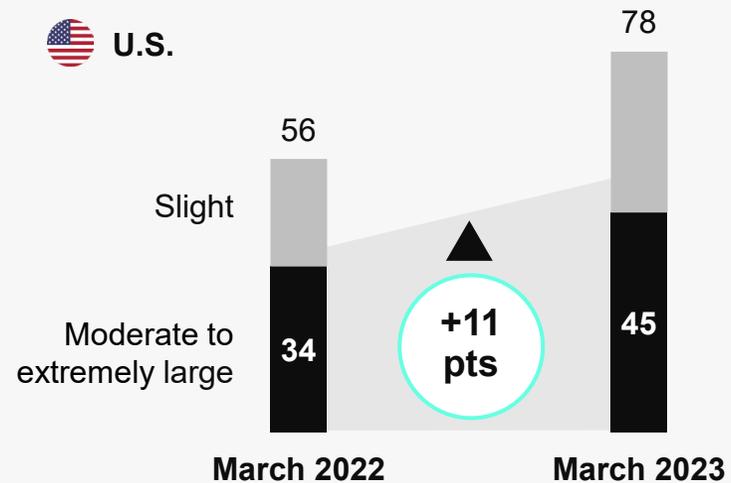
Percent who say, in the U.S.

My overall health is very good or better

Low-income people 36pts less likely than high income to report very good health



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



Biggest Barriers to Better Health: Cost and Information

Among the 78% in the U.S. who say there is a gap between how well they are currently taking care of their health vs how well they should be, percent who say

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

Cost

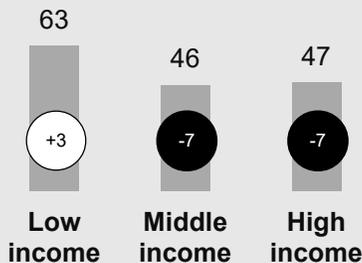
Healthy options cost too much
Cannot afford good healthcare
Cannot afford treatments

50%

-5 pts

Change, Mar 2022 to Mar 2023

16pt gap between those with high and low income



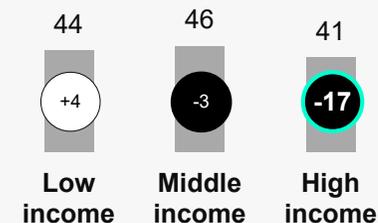
Information

Lack of information
Changing health recommendations
Contradictory expert advice

44%

-4 pts

Change, Mar 2022 to Mar 2023



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



Health Now Bigger Than Healthcare



My Health Is More Than My Physical Health

Percent who say, in the U.S.

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

Net dimensions:

Mental health

88%

- Feeling happy
- Can manage negative emotions

Physical health

83%

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

Social health

79%

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

Community livability

73%

- Clean, safe, peaceful community
- Healthy planet

60%

say all four components are dimensions of my “health”

Only 2% say being healthy is just about physical health



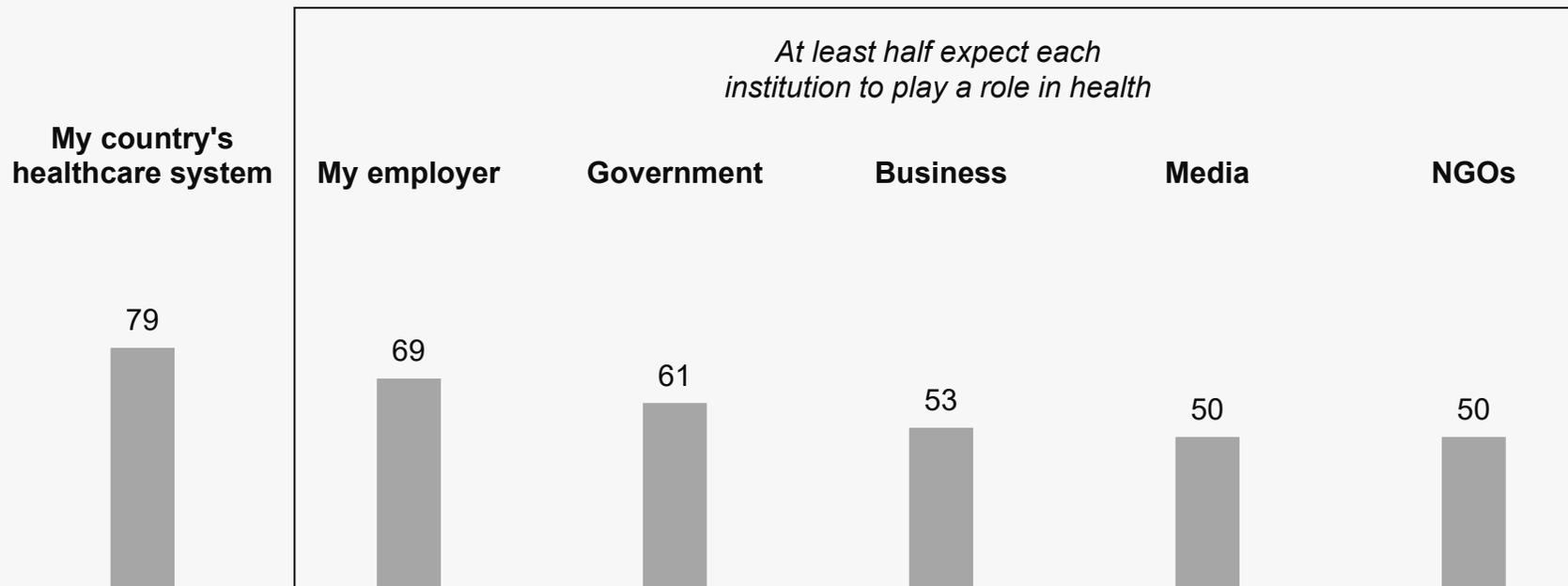
2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_DEF. Think about what being healthy means to you. For each of the following, please indicate how big a consideration it is in whether you see yourself as being healthy. 3-pt scale; code 3, major consideration. General population, U.S. “Mental health” is a net of codes 4-8; “physical health” is a net of codes 1-3; “social health” is a net of codes 9-12; “community livability” is a net of codes 13-15. The four-component score consists of respondents who selected at least one attribute from each of the four health dimensions. The exclusive physical health score is comprised of respondents who only selected one or more attributes in the physical health dimension and did not select attributes in any of the other three dimensions.



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

Percent who say, in the U.S.

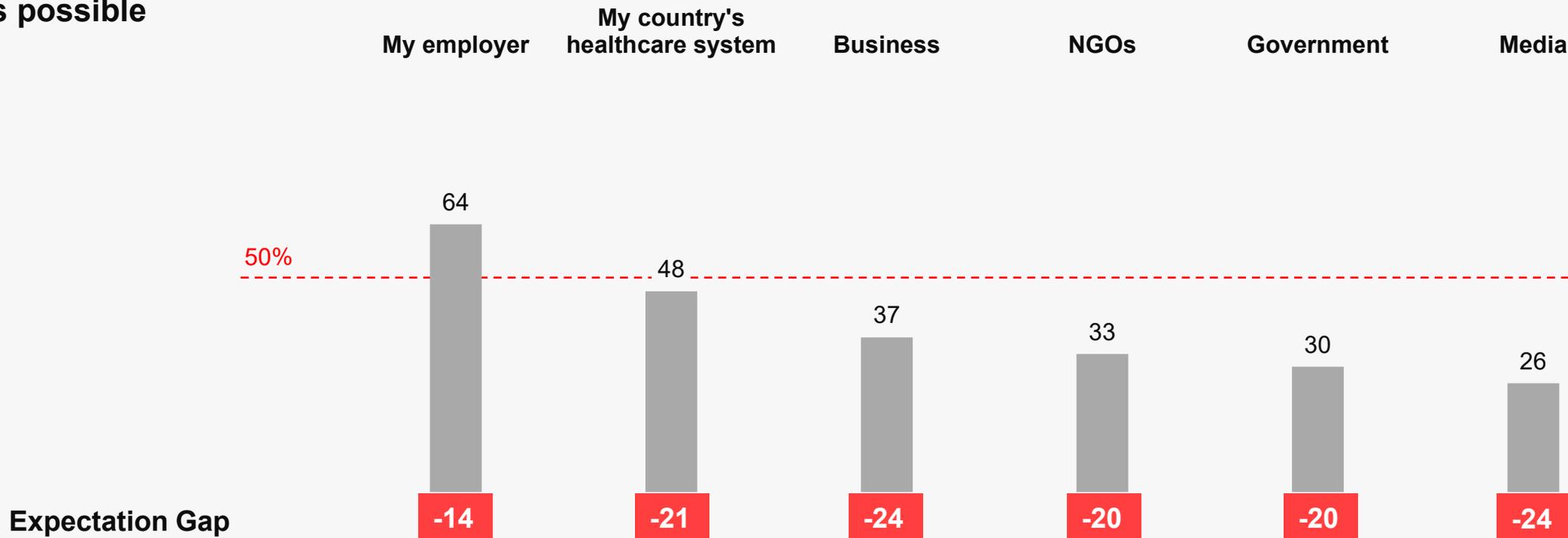
I expect each to **play a meaningful role** in making sure I am as healthy as possible



Among Institutions, Only My Employer Seen as Doing Well on Health by Majority

Percent who say, in the U.S.

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



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_RSP_RATE. How well do you feel each of the following are doing in making sure you are as healthy as possible? 5-point scale; top 2 box, doing well/very well. Question asked of half of the sample. General population, U.S. Data not collected in China. "My employer" was only asked employed by an organization (Q43/1).



Gen Z Leads Push for More Meaning at Work



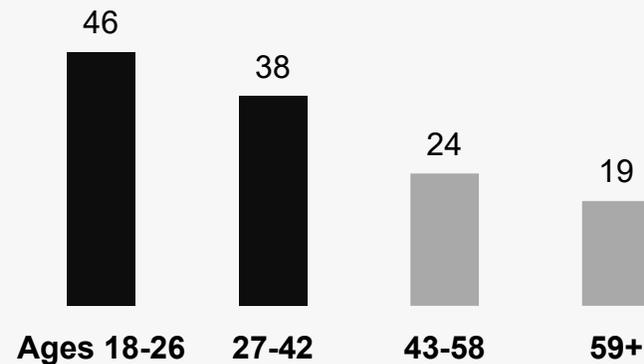
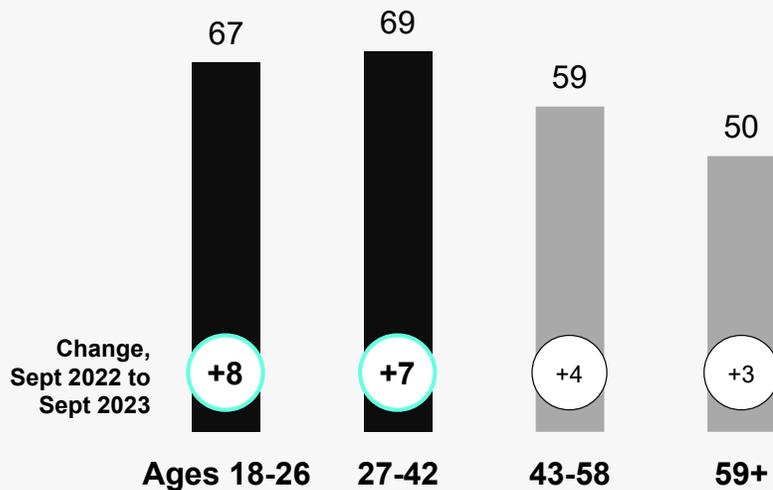
Gen Z and Millennials Bring the Outside World Into the Workplace

Percent of employees who say

GLOBAL 7  Significant change

I frequently engage in conversations with my coworkers about important societal issues

I am regularly so distraught over what is happening in the news that I am unable to function at work



2023 Edelman Trust Barometer Special Report: Trust at Work. CIVIL_ROLE. To what extent do you agree or disagree with the following statements? 9-point scale; top 4 box, agree. Question asked of half the sample. CNG_ATT. To what extent do you agree or disagree with the following statements? 9-point scale; top 4 box, agree. Question asked of half the sample. 7-mkt avg., by generation. All data is filtered to be among employees who work for an organization or corporation (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Young Coworkers Influence Our Willingness to Pressure Employers

Percent of employees who say

GLOBAL 7  Significant change

Coworkers in their twenties
have influenced...

...my willingness to pressure
my employer to change things
I do not approve of

...my openness to unions
or labor organizations

61%



Change,
Sept 2022 to
Sept 2023

62%

2023 Edelman Trust Barometer Special Report: Trust at Work. KID_INFLU_WRK. To what degree, if any, would you say that the following things about you and your behavior in the workplace today have been influenced by your coworkers in their twenties? 5-point scale; top 3 box, moderately to entirely. Question asked of half the sample. 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

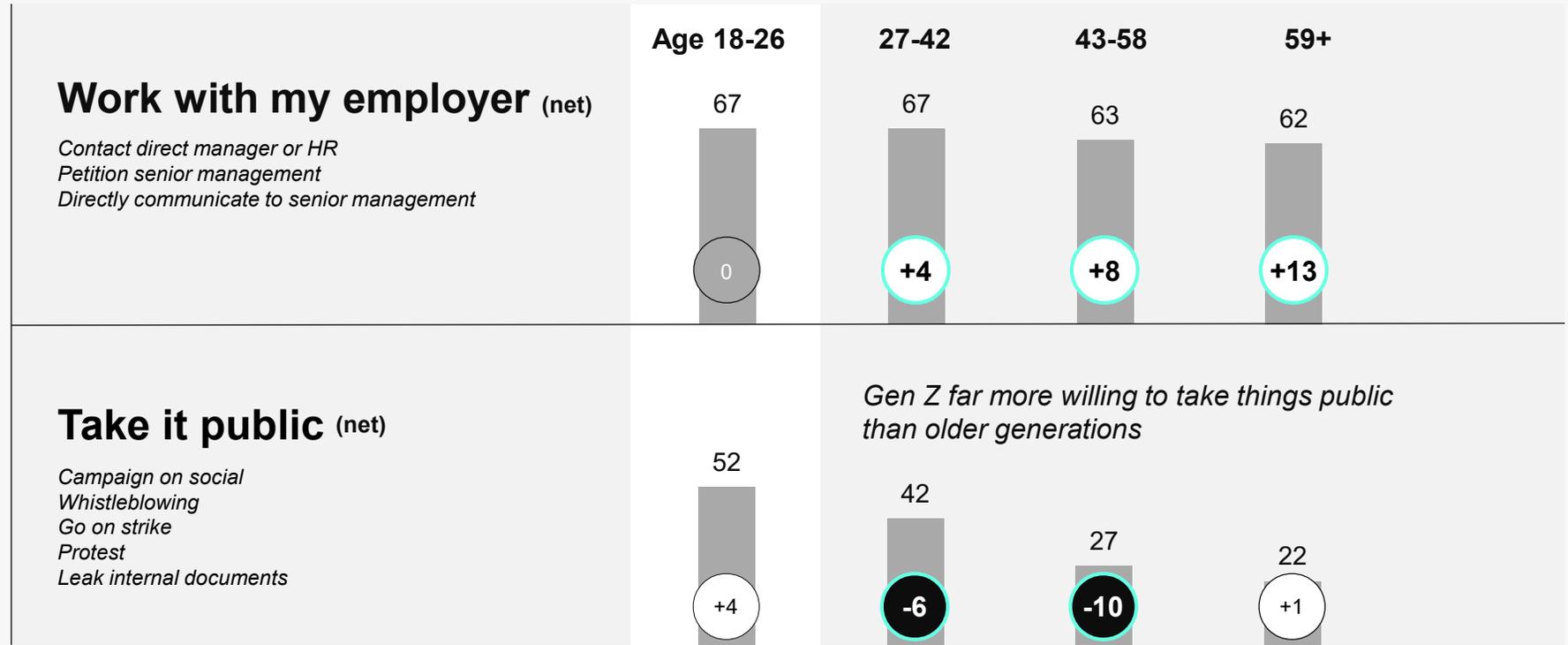


1 in 2 Gen Z Willing to Go Public to Push for Change at Work

Percent of employees who say

GLOBAL 7  **Change, Sept 2021 to Sept 2023**  **Significant change**

To produce or motivate urgently necessary changes within my organization, I would be willing to...



2023 Edelman Trust Barometer Special Report: Trust at Work. POW_HOW. What would you personally be willing to do in order to produce or motivate what you consider to be urgently necessary changes within the organization you work for? Pick all that apply. Question asked of half the sample. 7-mkt avg., by generation. "Work with my employer" is a net of attributes 1-3; "Take it public" is a net of attributes 4-5, 7-9. All data is filtered to be among employees who work for an organization or corporation (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level. These attributes track back to the 2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee.

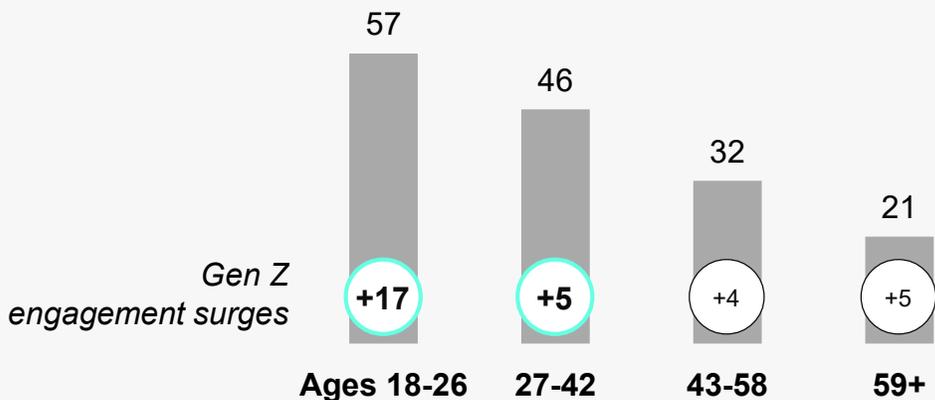


2021 to 2023: More Employees Are Sharing and Posting Employer-Related Content

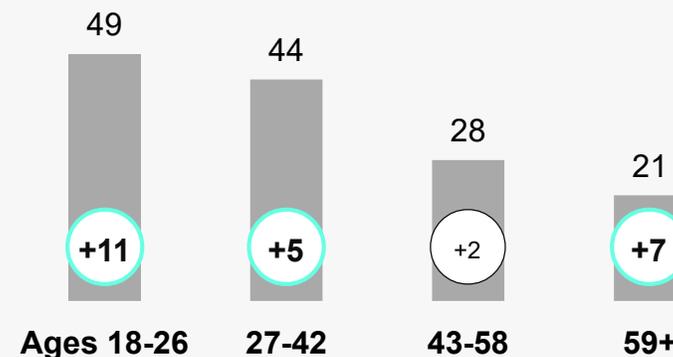
Percent of employees who say they engage in the following activities weekly or more

GLOBAL 7   Significant change

I share news coverage on social media about my employer weekly or more often



I post my own content about my employer weekly or more often



2023 Edelman Trust Barometer Special Report: Trust at Work. MED_JOB_OFT. How often do you engage in the following activities related to posting and forwarding news and information about the organization you work for? 7-point scale; top 3 box, weekly or more. Question asked of half the sample. 7-mkt avg., by generation. All data is filtered to be among employees who work for an organization or corporation (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level. These attributes track back to the 2021 Edelman Trust Barometer Special Report: The Belief-Driven Employee.

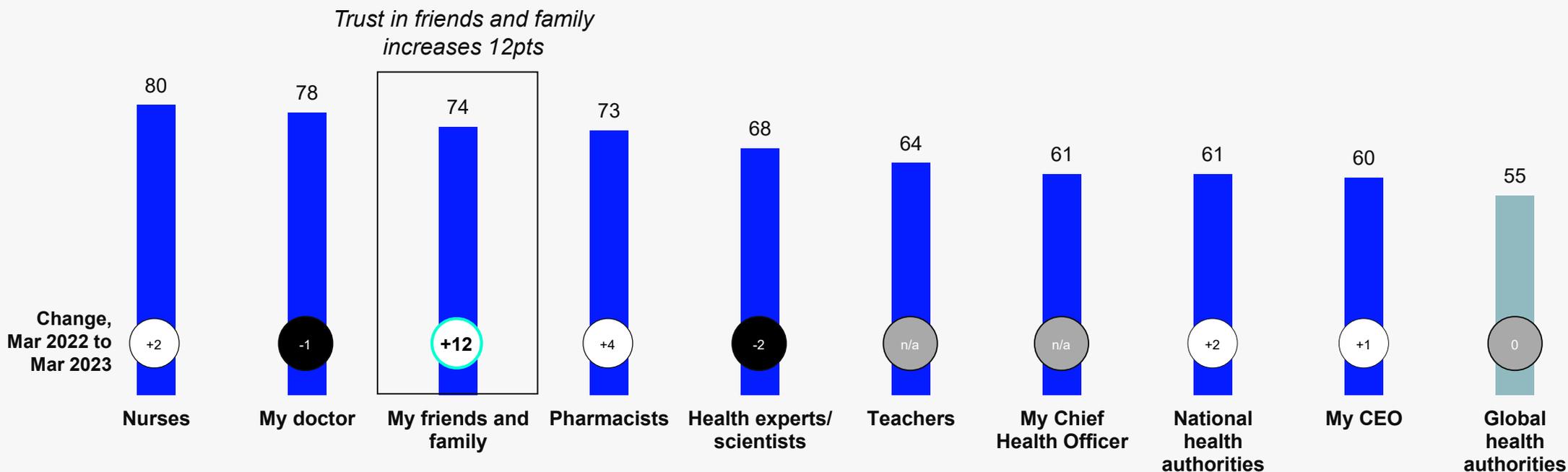
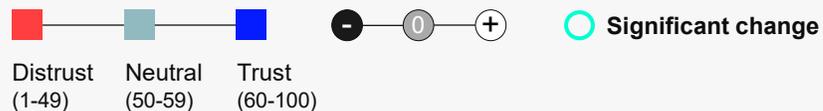


Rise in Peer Voices and Empowered Patients



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 the U.S.



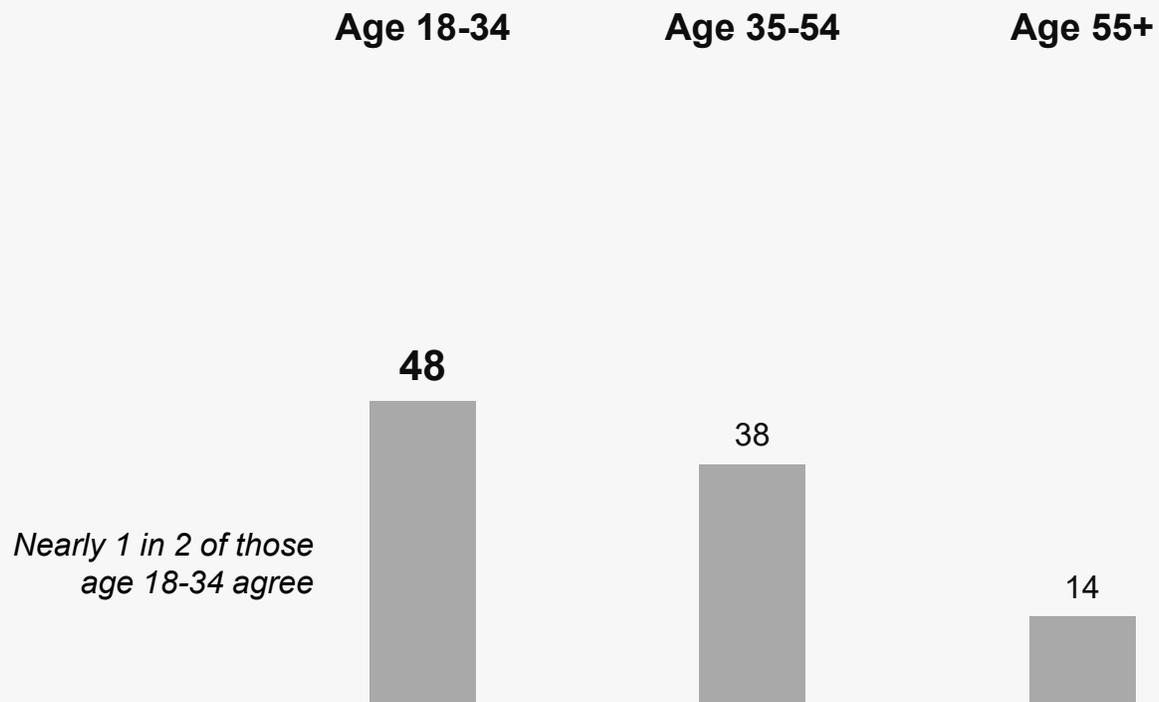
2023 Edelman Trust Barometer Special Report: Trust and Health. HEA_TRU_PEP. Below is a list of categories of people. For each one, please indicate how much you trust that group of people to tell you the truth about health issues and about how best to protect the health of the public. 9-point scale; top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



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

Percent who agree, in the U.S.

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



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%

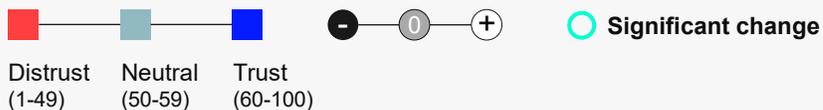
Have higher income

+1.7%



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

Percent who say

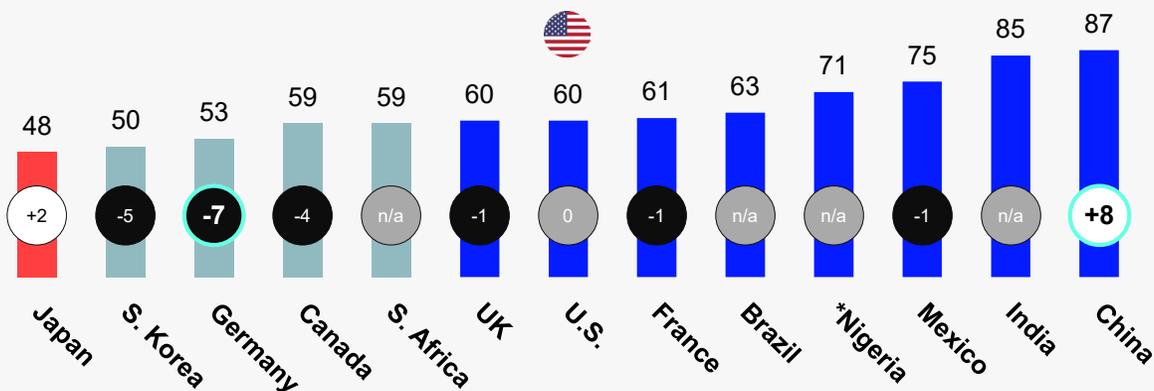


In general, I trust **healthcare companies** to do what is right

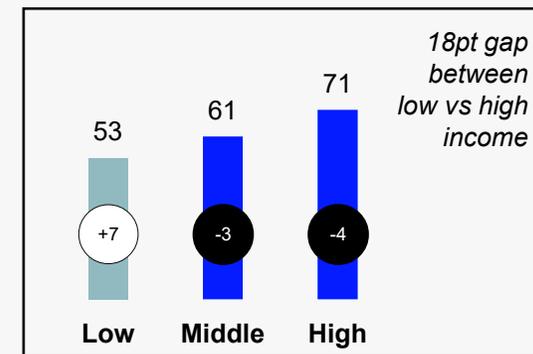
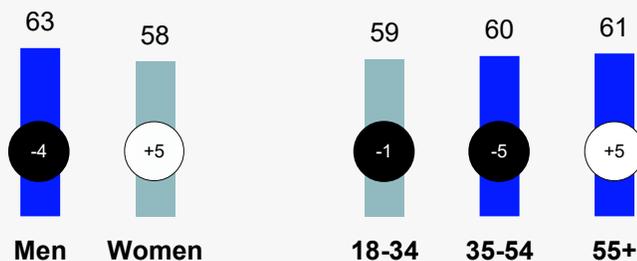


Change,
Mar 2022 to
Mar 2023

Market



Gender | Age | Income



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. General population, 9-mkt avg., and by U.S. demographics. *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.



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 the U.S.

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*

79%

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*

76%

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*

69%



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

Percent who say, in the U.S.

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

63%

Show how it fits my life

Acknowledge the burden the recommended change may present in my life

60%

Give me a voice

Give me a way to ask questions and voice my concerns

70%



Bridging the Trust Divide: Embrace the Voices They Will Hear

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

GLOBAL 12

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



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



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

Leverage employer trust to build health

Leverage healthcare purchasing to build trust in healthcare. Make health central to your products and business operations.

