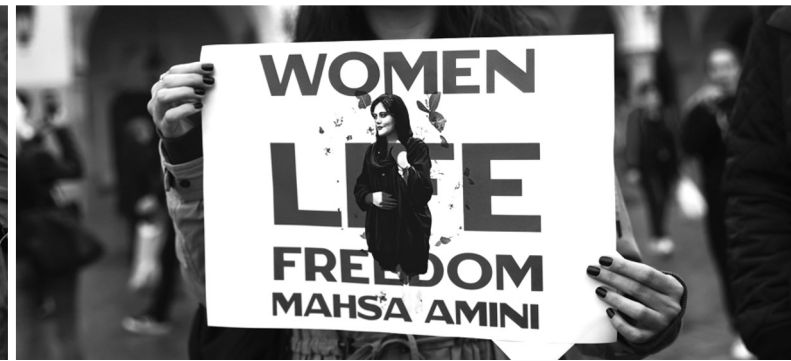


# 2023 Edelman Trust Barometer

UK Supplement Report



# 2023 Edelman Trust Barometer

## Methodology

### Annual online survey in its 23rd year

Fieldwork conducted: Nov 1 – Nov 28, 2022

**28**

Countries

**32,000+**

Respondents

**1,150+/-**

Respondents per country\*\*

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

Russia, part of the Edelman Trust Barometer from 2007 to 2022, was not included in this wave

\*\*The sample size varies by country from 1,082 to 1,500.  
 27-market global data margin of error: General population +/- 0.6 percentage points (n=31,171)  
 Country-specific data margin of error: General population +/- 2.5 to 3.0 percentage points (varies by country based on sample size, n=1,082 to n=1,500)

### Global averages

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

**GLOBAL 27**

\*To protect the stability of the global average, Sweden will not be included in the average until there are at least two years of recent data

**GLOBAL 25** Excludes China and Thailand

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

### Statistical significance

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



# 2023 Edelman Trust Barometer UK Supplement

## Methodology

### Online Survey in the UK

All fieldwork was conducted between 20 January – 30 January 2023

### General Population

- **3,051** respondents
- Ages **18+**
- Nationally representative of the UK population in terms of gender, age, and region
- All slides show UK General Population unless otherwise noted



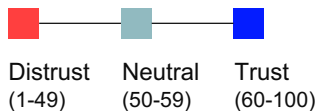
# Polarisation & the Global Landscape



# Mass-Class Divide: Income-Based Inequality Creates Two Trust Realities

## Trust Index

(average percent trust in NGOs, business, government, and media)



2023 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg., by income. \*Sweden is not included in the global average.

Income quartiles were determined separately for each country based on the distribution of household incomes among respondents from that country.

### 2023 High income (top 25%)

64	Global 27
90	China
85	Thailand
84	Saudi Arabia
82	Indonesia
82	UAE
76	India
73	Singapore
70	Kenya
66	Malaysia
64	Mexico
63	U.S.
62	Nigeria
62	The Netherlands
60	France
60	Germany
60	Ireland
59	Italy
56	Brazil
54	Australia
54	Colombia
53	Canada
52	S. Africa
52	*Sweden
51	UK
49	Spain
48	Japan
47	Argentina
44	S. Korea

### 2023 Low income (bottom 25%)

49	Global 27
71	China
70	India
68	Indonesia
64	Saudi Arabia
63	Kenya
63	UAE
56	Mexico
56	Nigeria
55	Malaysia
55	Singapore
48	Brazil
48	Thailand
47	Canada
46	France
46	Italy
46	The Netherlands
44	Colombia
43	Australia
42	Germany
42	Ireland
41	S. Africa
41	*Sweden
40	Spain
40	U.S.
37	Argentina
35	UK
29	Japan
29	S. Korea

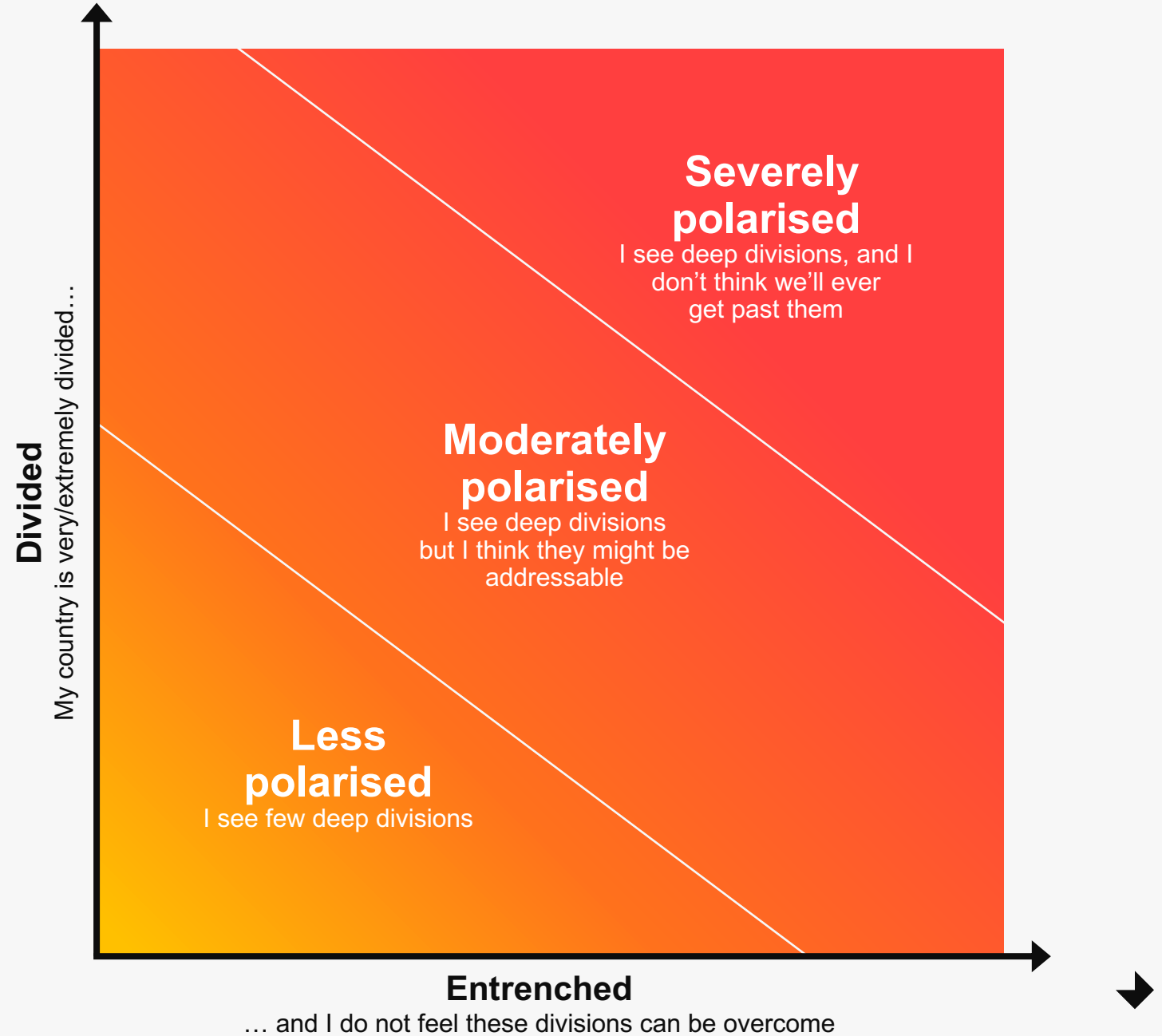
15pts trust inequality globally;  
double-digits in 21 of 28 countries

### Greatest income-based trust inequality in:

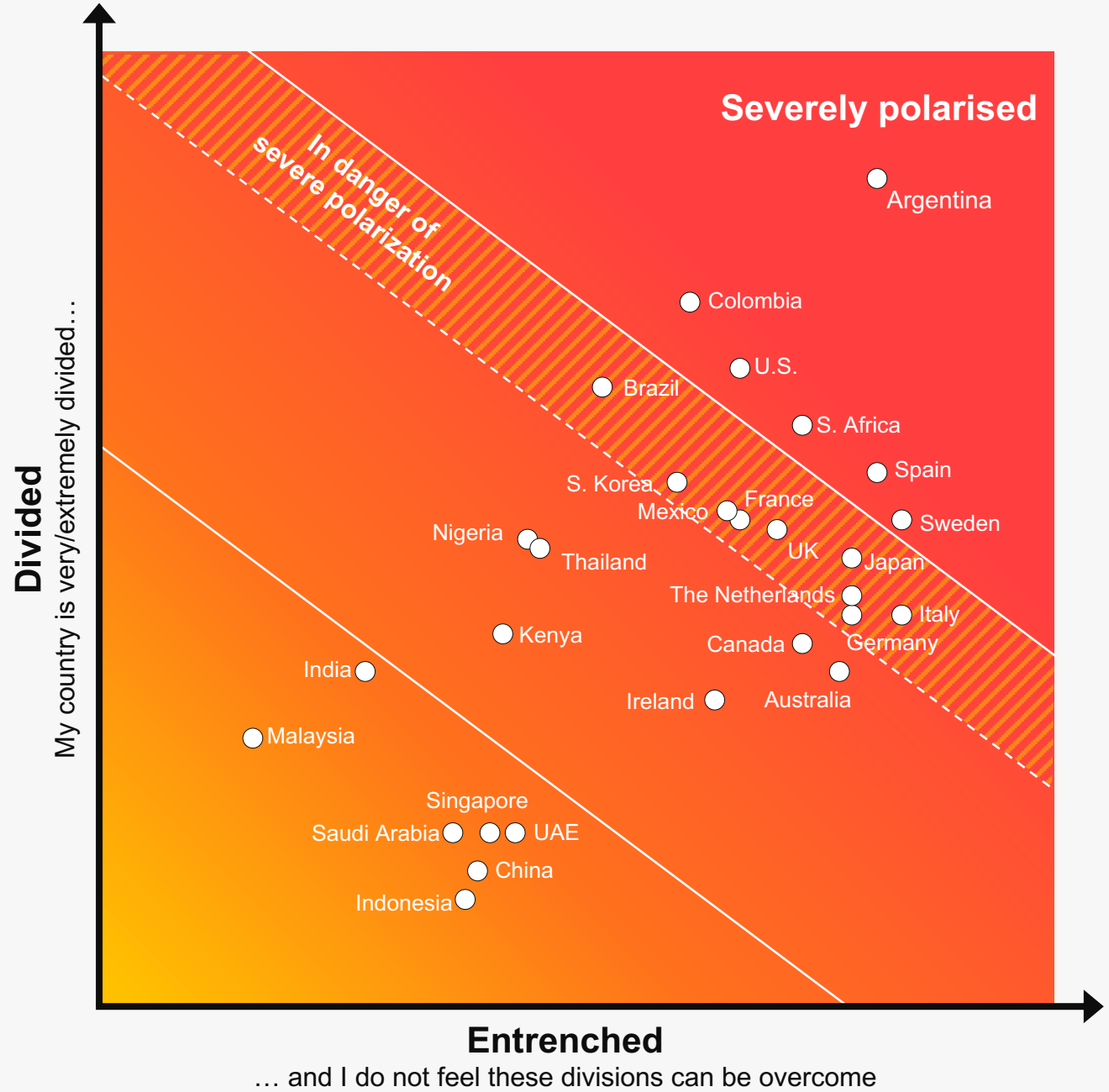
Thailand	37pts
U.S.	23pts
Saudi Arabia	20pts
China	19pts
Japan	19pts
UAE	19pts



# Polarisation Most Severe When Deep Divisions Become Entrenched

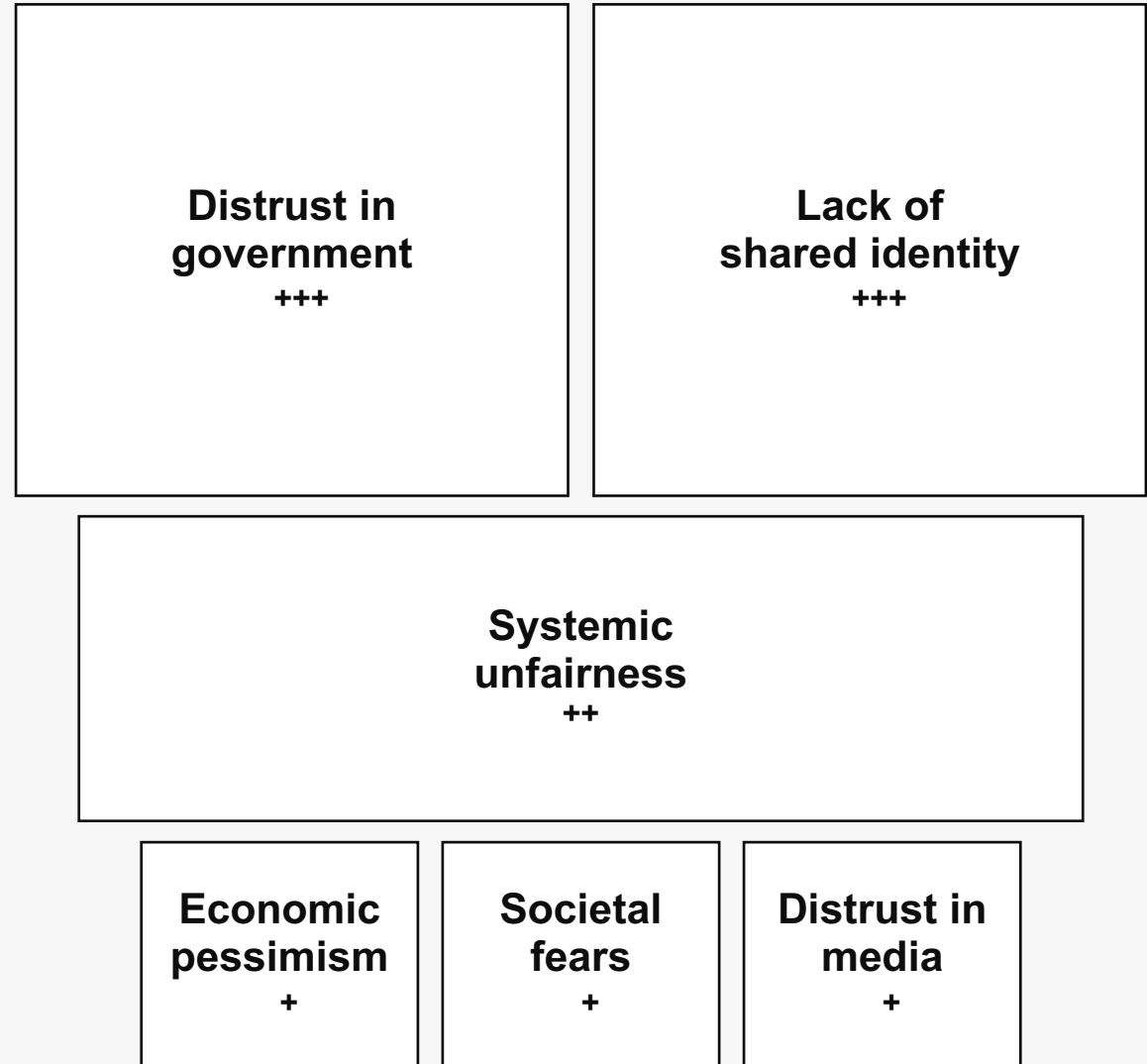


# Six Countries Severely Polarised



2023 Edelman Trust Barometer. POL\_DEG. Using the scale below, please indicate how divided on key societal issues you believe your country is today. 5-point scale; top 2 box, very/extremely divided. POL\_PROG. How likely or unlikely do you think it is that your country will be able to work through or overcome its ideological divisions and lack of agreement on key issues and challenges? 8-point scale; codes 2-5, divisions can't be overcome. General population, by market. Data for "entrenched" is POL\_PROG/2-5 filtered by those who feel their country is very/extremely divided (POL\_DEG/4-5). All data is rebased to exclude those that said, "don't know."

# Drivers Of Polarisation: Distrust, Weak Social Fabric, Unfairness



### Size of impact on respondent's perception of polarization

+ Less than .20   ++ .20 to .30   +++ More than .30

Only significant drivers of polarization are shown





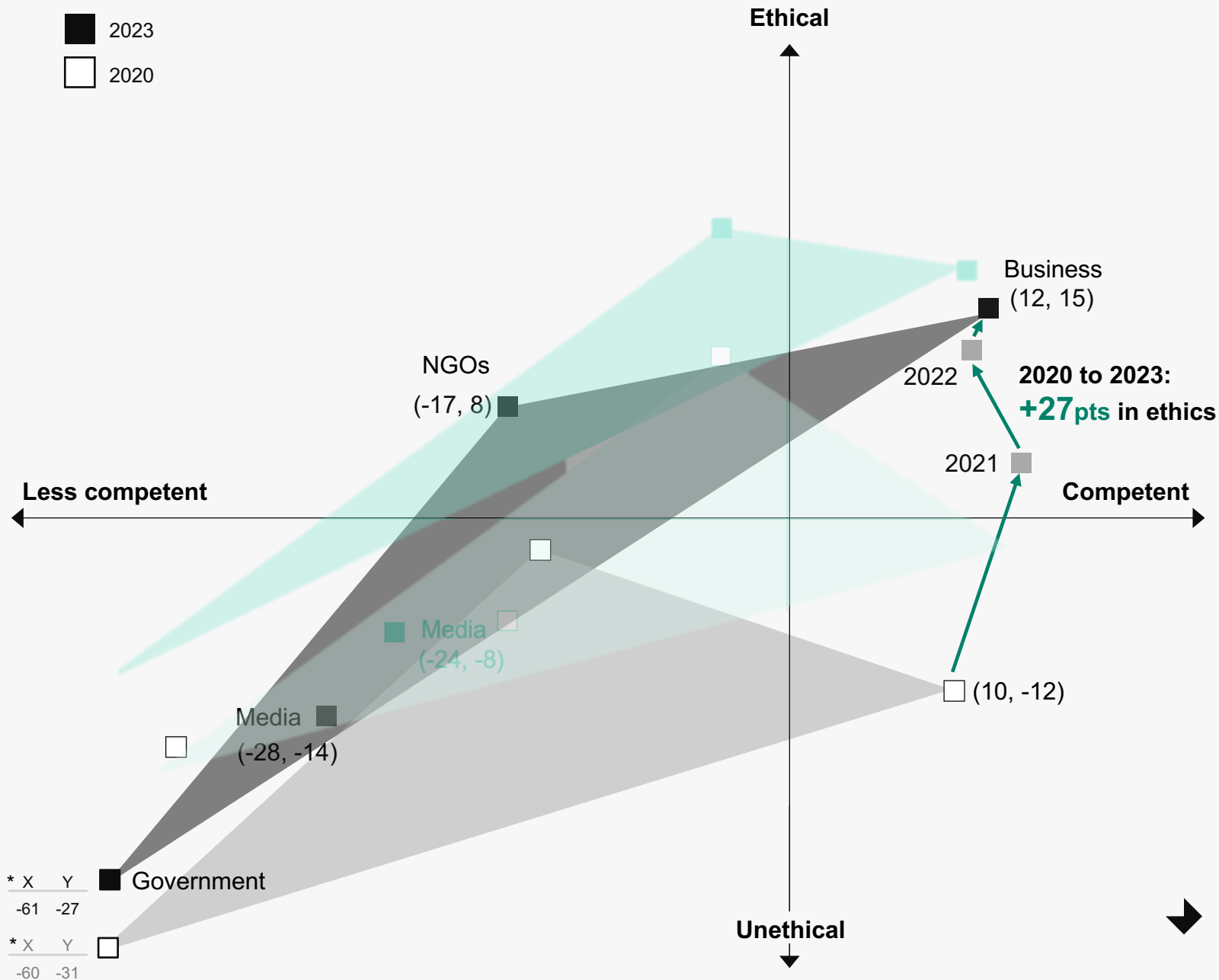
# In the UK, Only Business is Competent and Ethical; Sustains Rise in Ethics for Third Year

(Competence score, net ethical score)



2023 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]\_PER\_DIM/1-4. Government and Media were only asked of half of the sample. The competence score is a net based on TRU\_3D\_[INS]/1. Government and Media were only asked of half of the sample. General population, UK. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

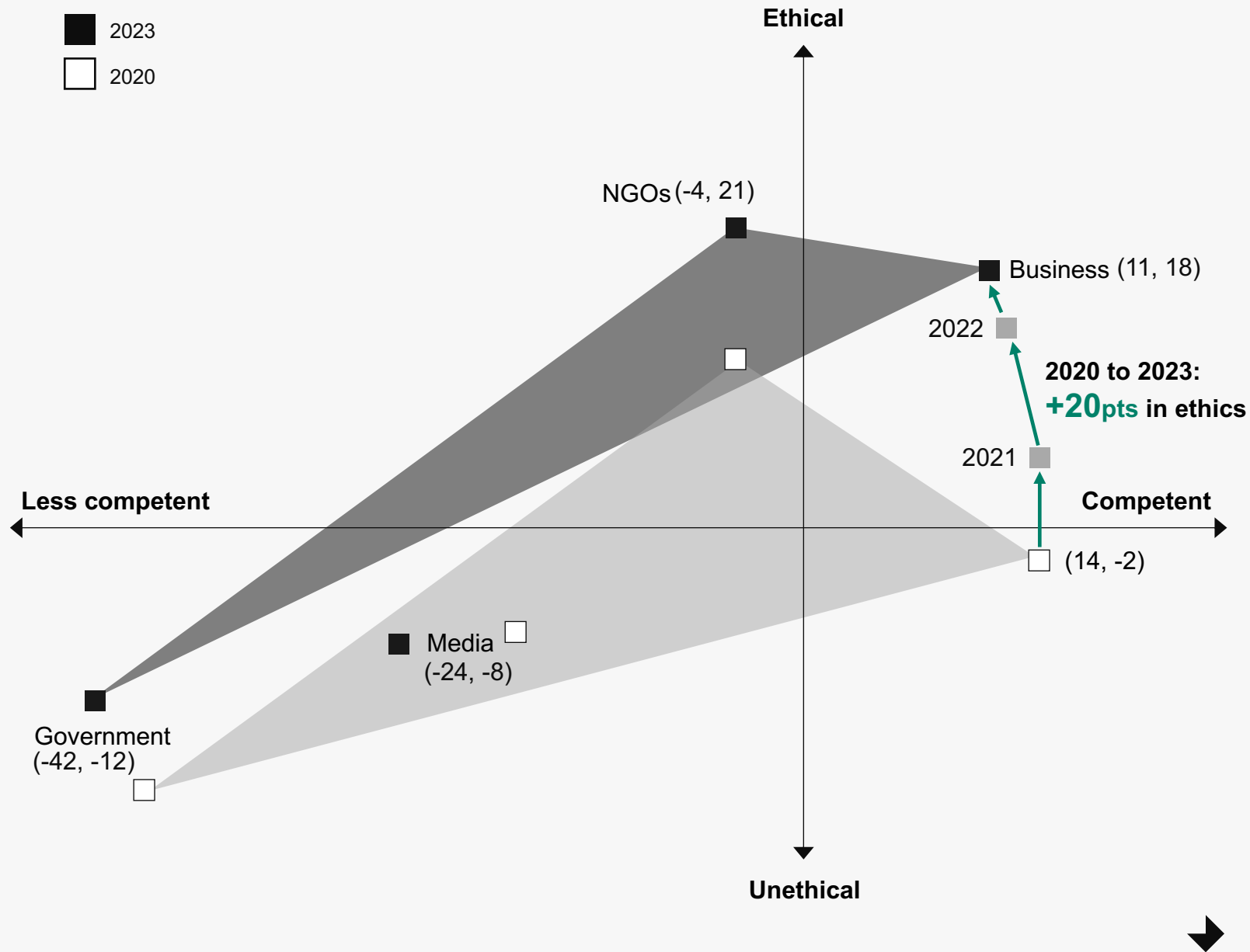
\*Coordinates provided for reference: government points not shown to scale



# Only Business is Competent and Ethical, Sustains Rise in Ethics for Third Year

(Competence score, net ethical score)

GLOBAL 24 Excludes China and Thailand

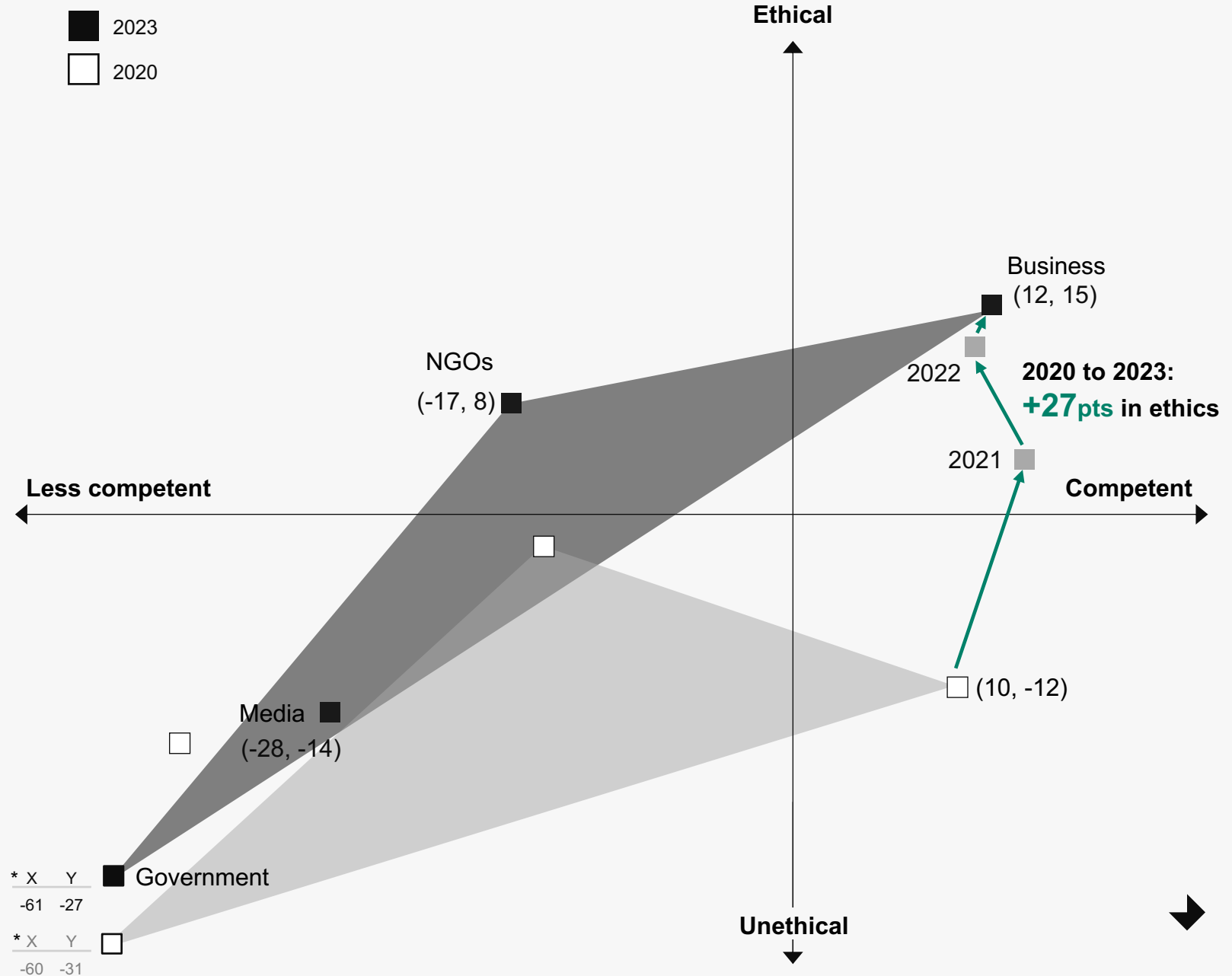


2023 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]\_PER\_DIM/1-4. Government and Media were only asked of half of the sample. The competence score is a net based on TRU\_3D\_[INS]/1. Government and Media were only asked of half of the sample. General population, 24-mkt avg. Data not collected in China and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.



# In the UK, Only Business is Competent and Ethical; Sustains Rise in Ethics for Third Year

(Competence score, net ethical score)



2023 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]\_PER\_DIM/1-4. Government and Media were only asked of half of the sample. The competence score is a net based on TRU\_3D\_[INS]/1. Government and Media were only asked of half of the sample. General population, UK. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

\*Coordinates provided for reference: government points not shown to scale



# Want More Societal Engagement from Business, Not Less

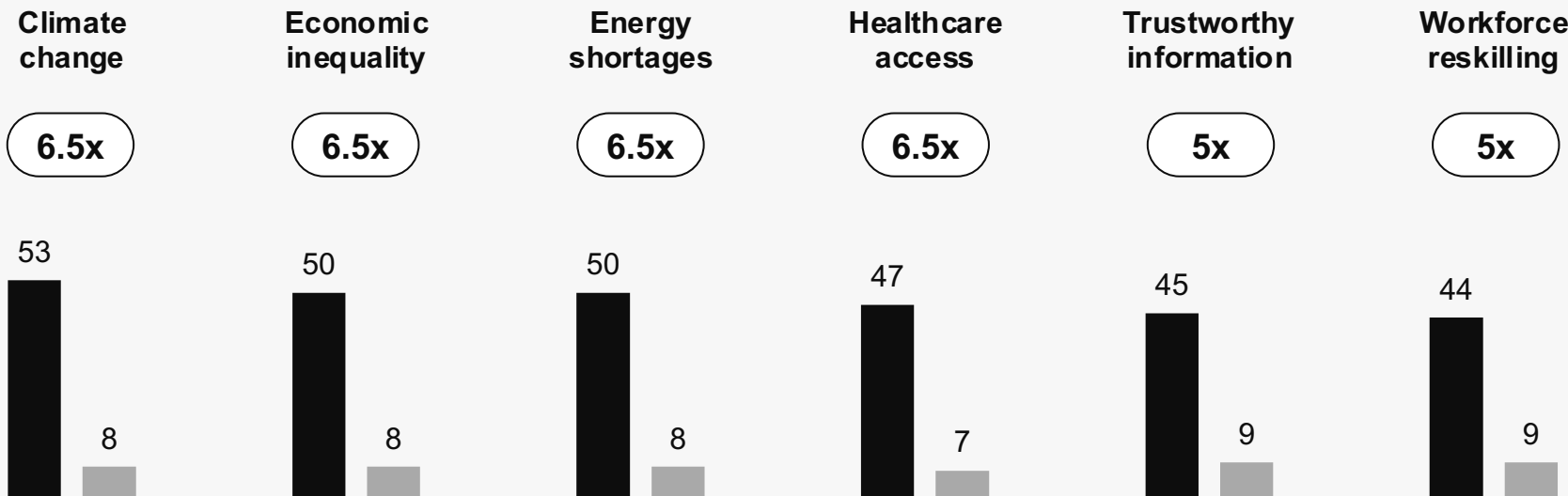
Percent who say

GLOBAL 27

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

not doing enough      overstepping

Multiplier  
not doing enough vs overstepping





2023 Edelman Trust Barometer. BUS\_BND. Think about business as an institution, and its current level of engagement in addressing societal needs and issues. When it comes to each of the following areas, please indicate if you think business is going too far and overstepping what it should be doing, is doing just the right amount in regard to this activity, or is not going far enough in its actions and should be doing more. 3-point scale; code 3, "not doing enough"; code 1, "overstepping". General population, 27-mkt avg. The multipliers are rounded to the nearest .5.

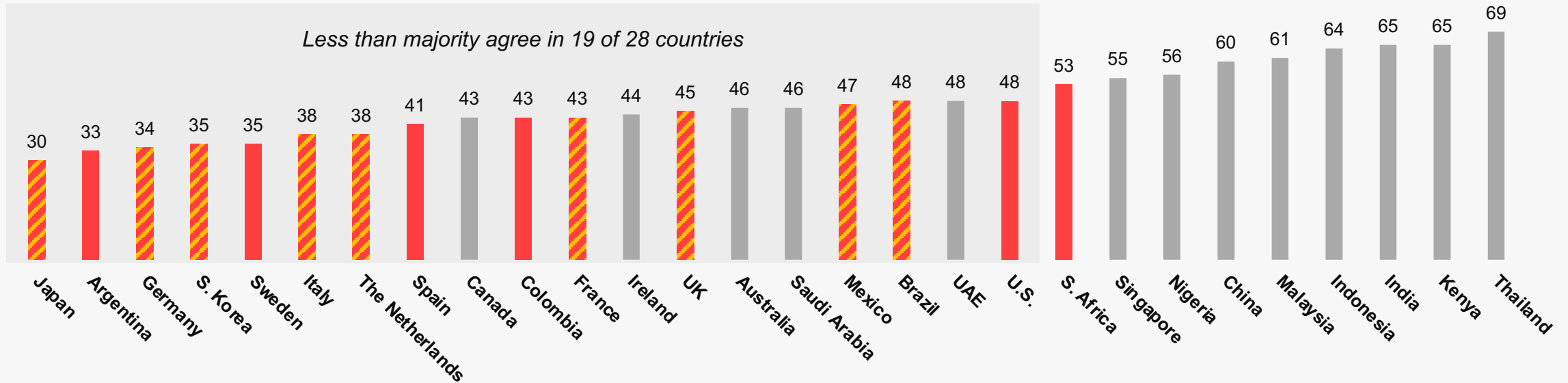


# Societal Engagement Puts Business at Risk of Being Politicised

Percent who agree

I think **business can avoid being political** when it addresses contentious societal issues

 At risk of becoming severely polarised  
 Severely polarised



2023 Edelman Trust Barometer. ENG\_ISS. Do you agree or disagree with the following statement: It is possible for a business to engage in addressing contentious societal issues in ways that I would not consider to be political or politically motivated. 9-point scale; top 4 box, agree. General population, 27-mkt avg.



# 2023 Edelman Trust Barometer

UK Supplement Report



# Summary

## Hardship & institutional distrust: A concerning combination



Record levels of pessimism, a growing sense of inequality, and strong beliefs that the country is on the wrong track illustrates a concerning and bleak outlook in the UK.

Alongside this consensus of pessimism, trust in government has fallen to a 7-year low with trust in leading politicians and in parties also at low levels.

## A nation seeking new direction



There is clear division and uncertainty on how to deal with the substantial difficulties facing the country but strong demand for new thinking, new ideas, even a new political movement to show leadership in turbulent times.

The substantial challenge for institutions is to create a new, compelling and tangible vision to meet the demands of a public dangerously low on trust.

## Rebuilding trust, recovery and progress

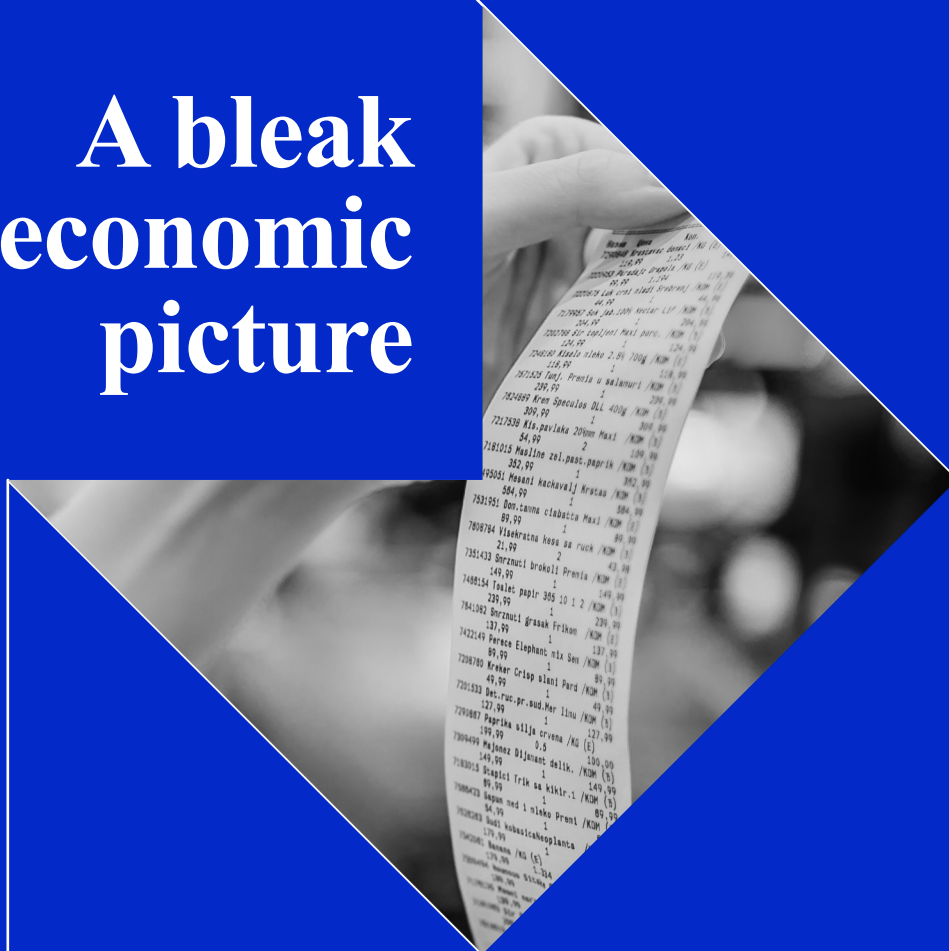


To rebuild trust and navigate the nation away from such turmoil, institutional leaders must demonstrate the conviction, substance and charisma to engage the public with a new way forward.

Government and business must work in partnership, to rekindle and rebuild trust in their ability as positive forces for recovery and progress.



# A bleak economic picture

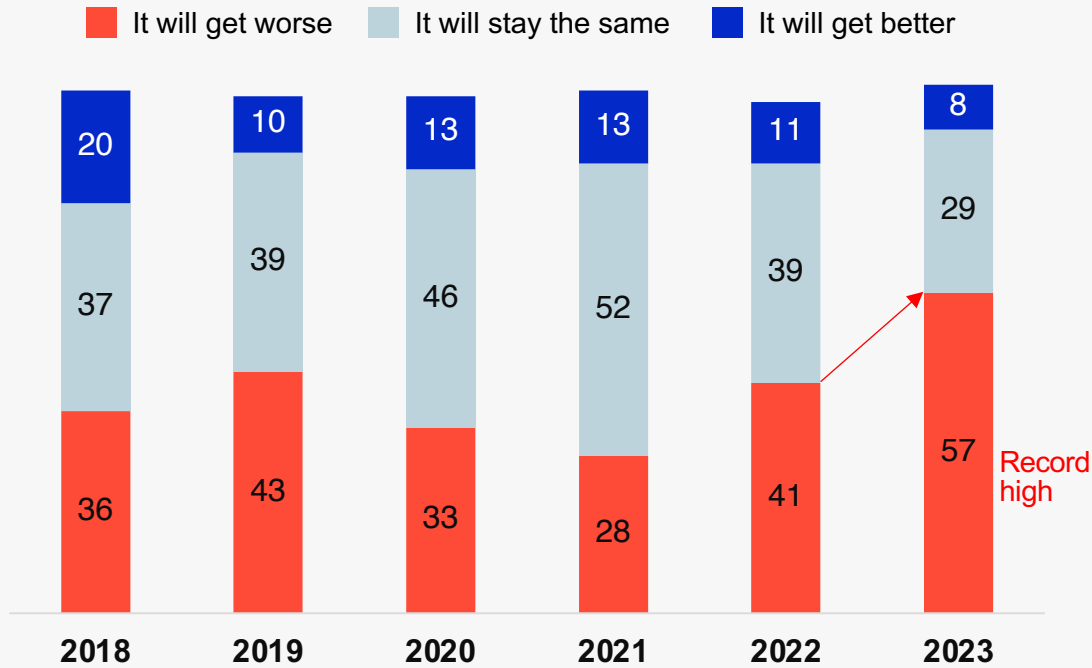




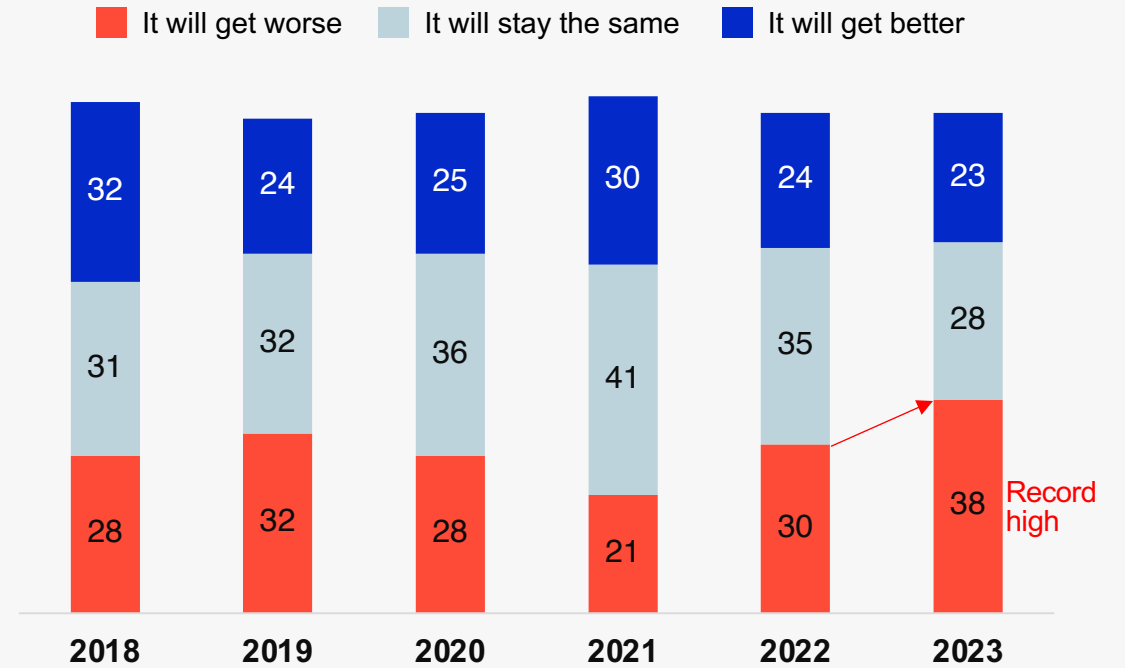
# Record high proportions expecting things to get worse, with pessimism outweighing optimism in the longer term

Expected change in standard of living, in the UK

### CHANGE IN STANDARD OF LIVING OVER THE NEXT YEAR



### CHANGE IN ECONOMIC PROSPECTS OVER THE NEXT 5 YEARS



% Don't know not shown



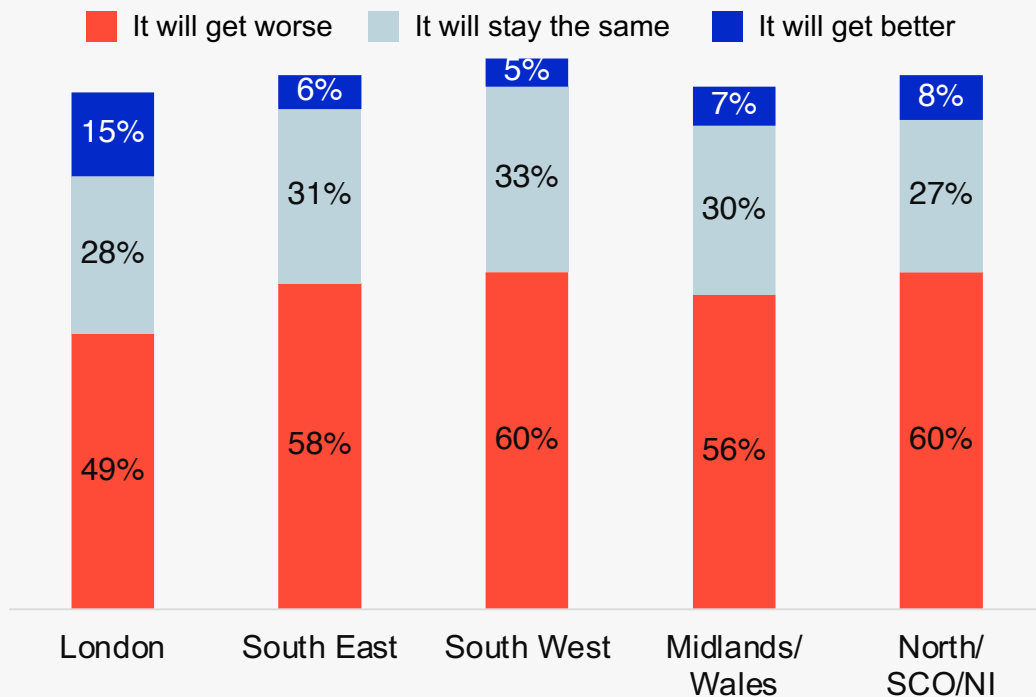
2023 Edelman Trust Barometer UK Supplement. Q7. Do you feel your standard of living in terms of your level of wealth, comfort and access to material goods and necessities will get better, get worse or stay the same over the course of 2023? Q8. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? See bases in notes



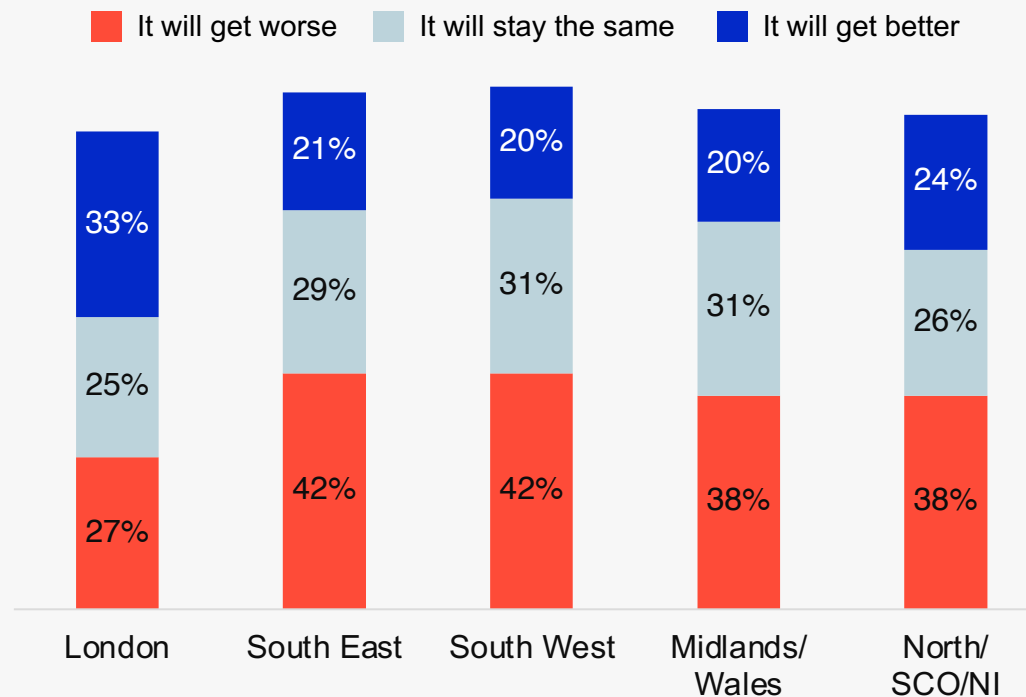
# Pessimism is felt across regions

Expected change in standard of living, across regions

### CHANGE IN STANDARD OF LIVING OVER THE NEXT YEAR



### CHANGE IN ECONOMIC PROSPECTS OVER THE NEXT 5 YEARS



% Don't know not shown



2023 Edelman Trust Barometer UK Supplement. Q7. Do you feel your standard of living in terms of your level of wealth, comfort and access to material goods and necessities will get better, get worse or stay the same over the course of 2023? Q8. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? Base UK: (3051), London (390), South East (417), South West (247), North/SCO/NI (1090), Midlands/Wales (907)



# Conservative supporters are alone in their belief that the country is on the right track

Country on the right or wrong track, in the UK

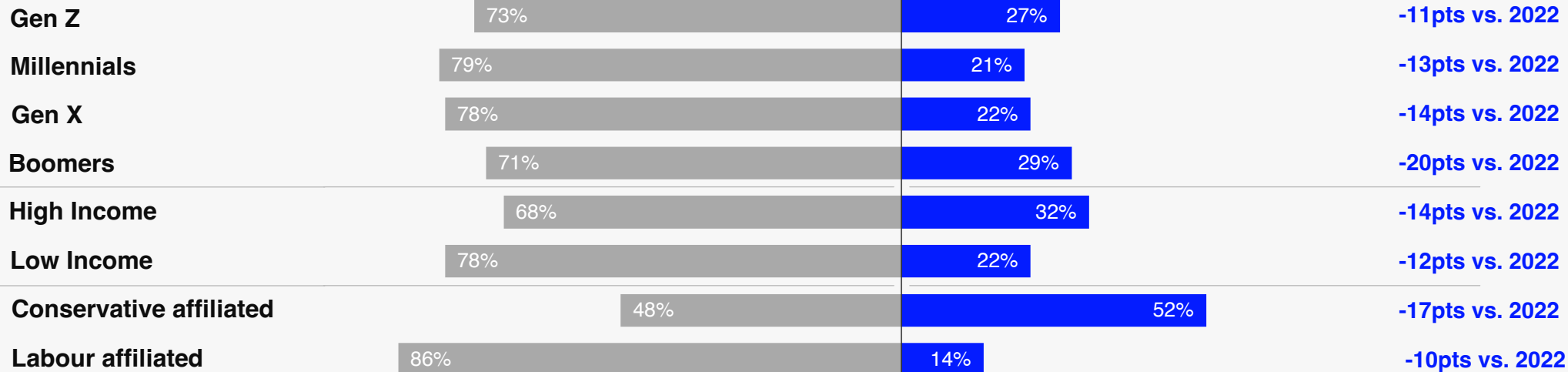
WRONG TRACK      RIGHT TRACK

▲ General Population



↓ -16pts vs. 2022

Record low & record fall



# Double digit increase in sense of inequality

Agreement with key issues, in the UK

Levels of inequality are increasing



2023 Edelman Trust Barometer. Q4. Thinking about the key issues the UK is facing today, please select which statement best describes your opinion? where your opinion falls on the scale between each of the two paired statements. Base: UK (3051), Gen Z (522), Millennial (796), Gen X (744), Boomer (989), Gen X (744), Boomer (989), London (390), South (664), North/SCO/NI (1090), Midlands/Wales (907), Low income (466), Middle income (2262), High income (241).



# People's biggest concerns are dominated by cost-of-living related worries

Biggest concerns in the UK

#1



59%

(+6pts vs '22)

Cost-of-living crisis

#2



25%

(not asked in '22)

Having **enough money** to sustain a good standard of living

#3



25%

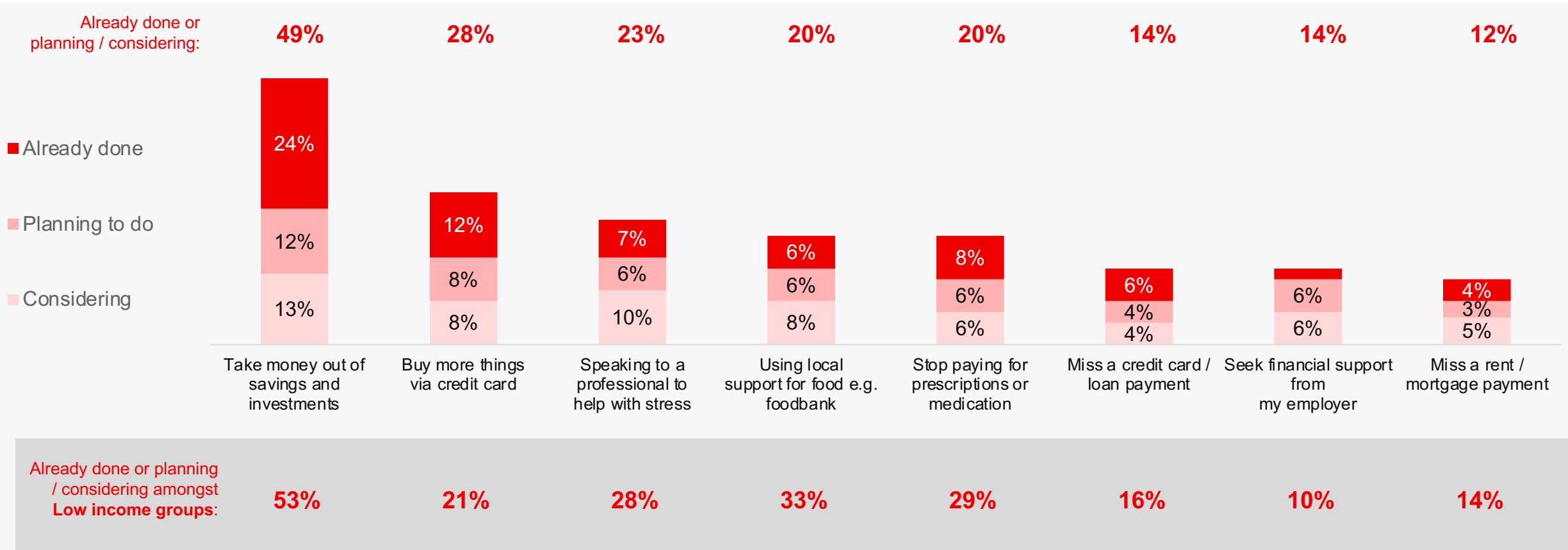
(no change vs '22)

The **divide** between the rich and the poor getting bigger



# Some are turning to desperate measures and behaviours

Impact of the rise of the cost-of-living, in the UK

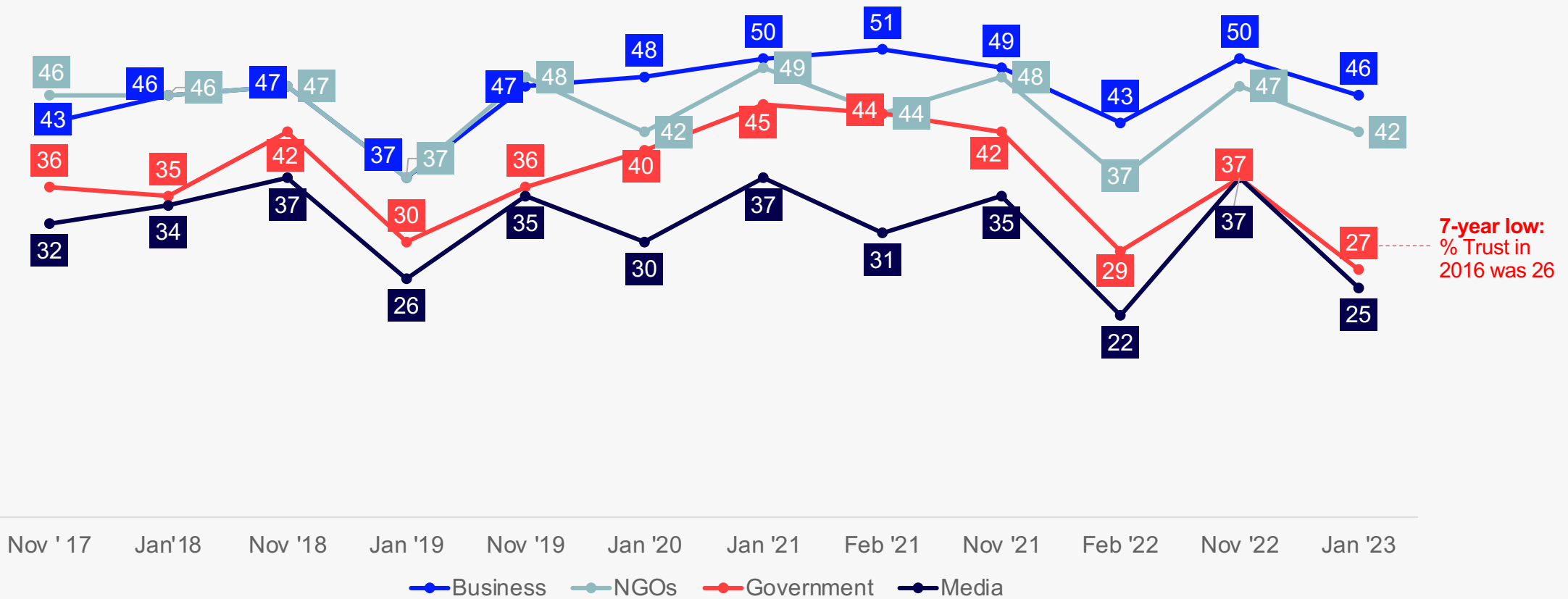


# Disdain for government, politics and politicians



# Trust in government reaches a 7-year low

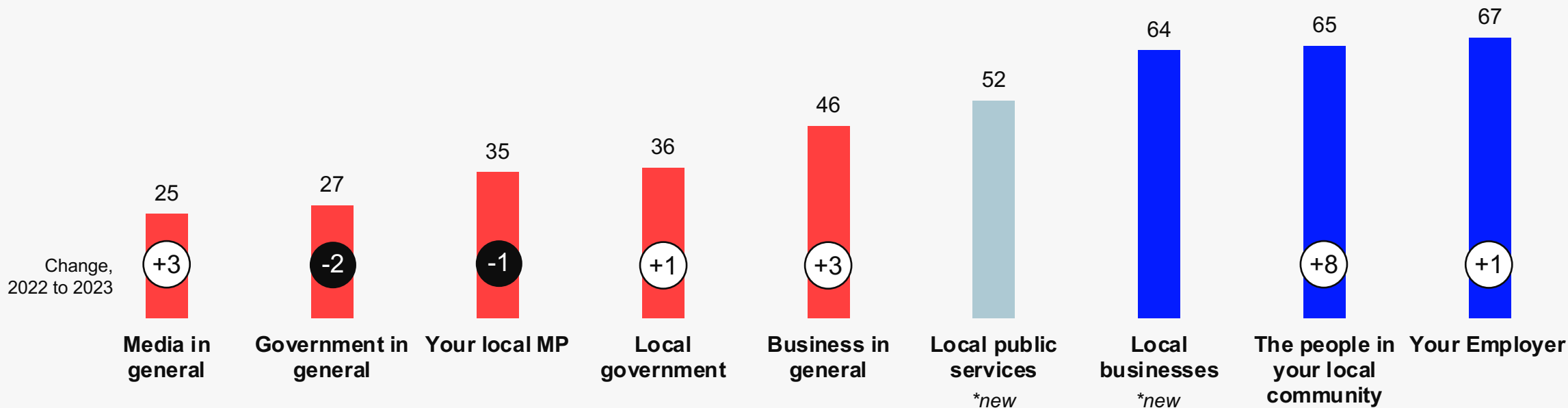
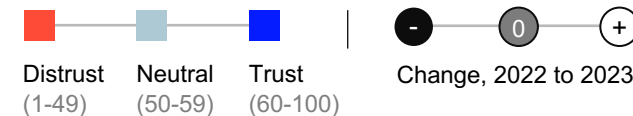
Percent trust, in the UK





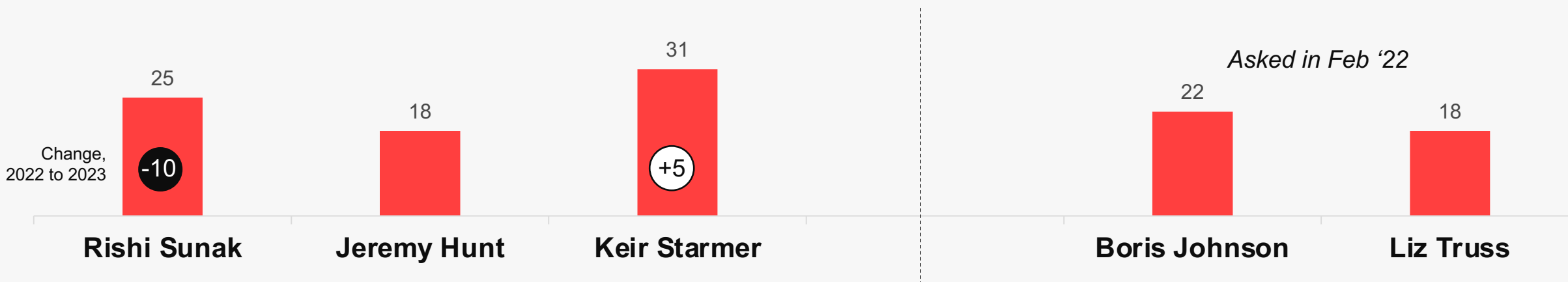
# National institutions and local MPs distrusted, trust resides close to home

Percent trust, in the UK



# Trust across leading political figures stays low with Rishi Sunak suffering a double-digit drop

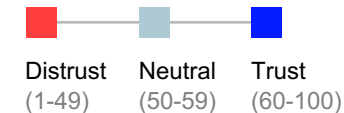
Percent trust in politicians



# Trust in national leaders is weak across the board

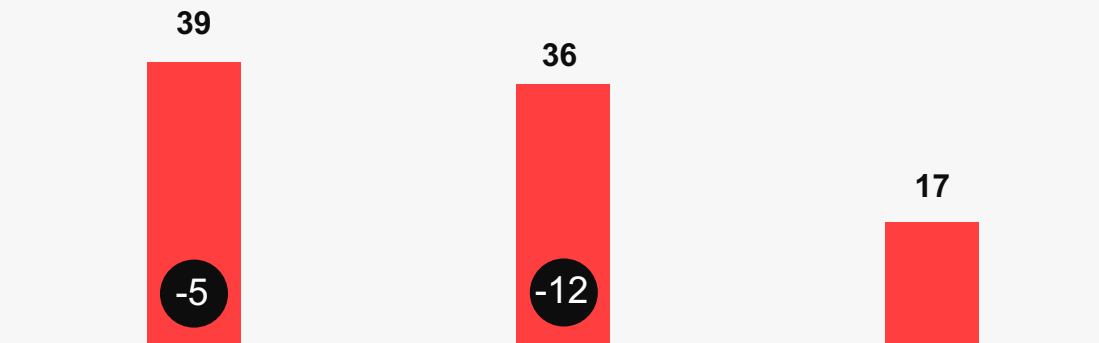
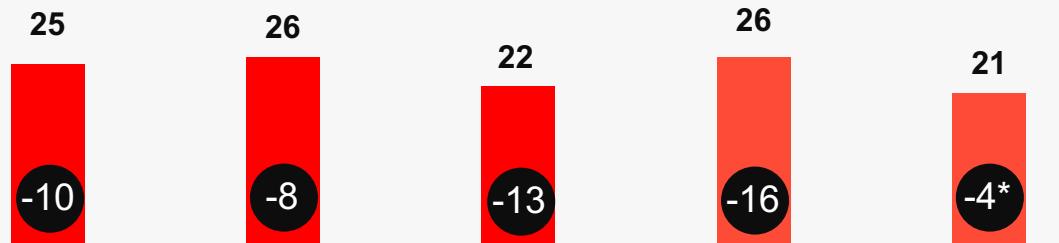
Percent trust, in the UK

Percent of each nation's population who trust their government leader



## Rishi Sunak

## Nicola Sturgeon Mark Drakeford Jeffrey Donaldson



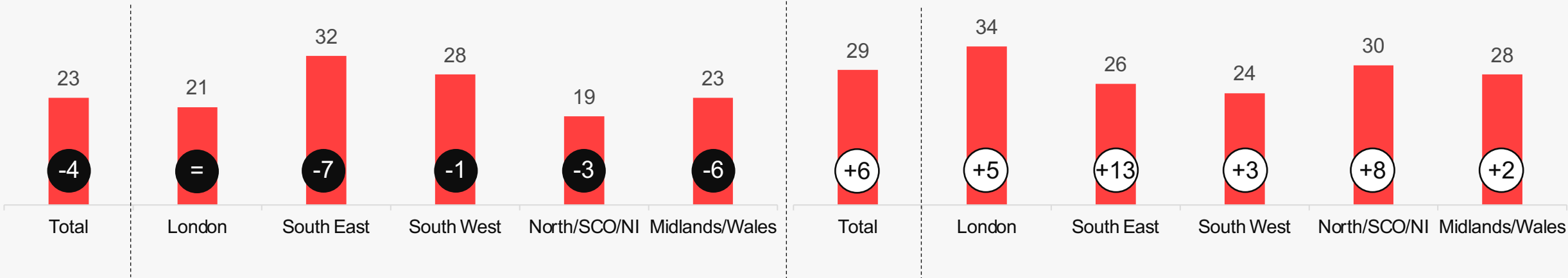
2023 Edelman Trust Barometer UK Supplement. Q18. Please indicate how much you trust the following public figures to do what is right. 9-point scale; top 4 box, trust. Base UK (3051), England (2549), Scotland (231), Wales (141), Northern Ireland (130)



\*Northern Ireland sample from 2022 n<100

# Affiliation to the Conservative Party falls while Labour show improvement across regions

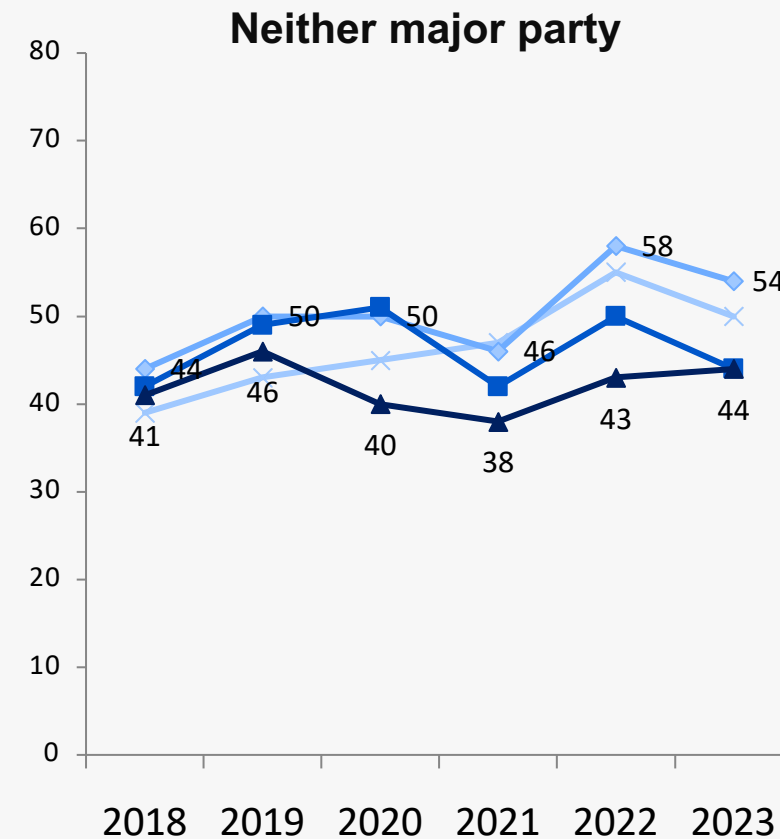
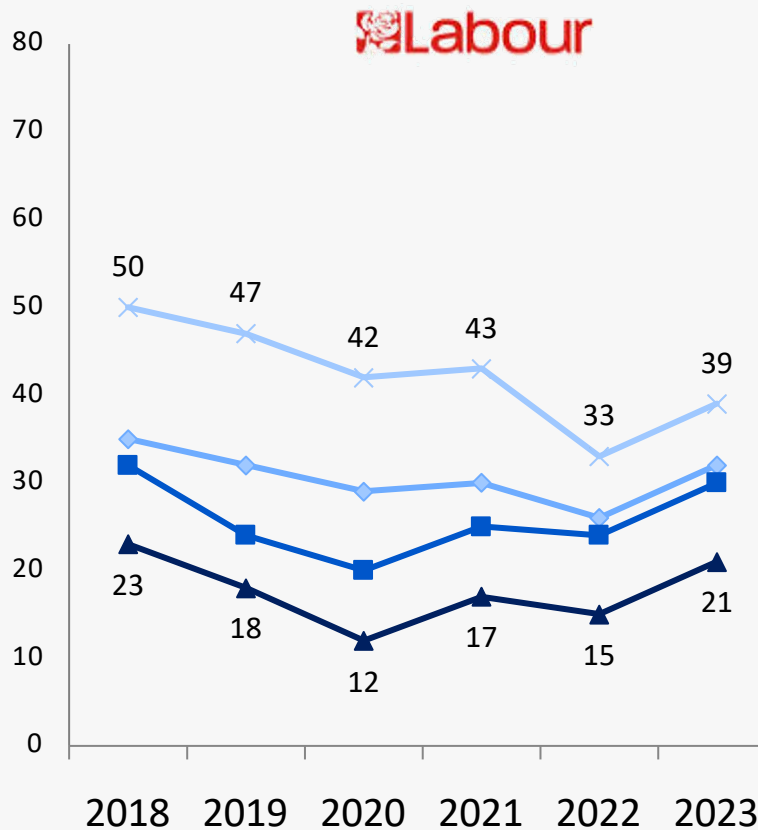
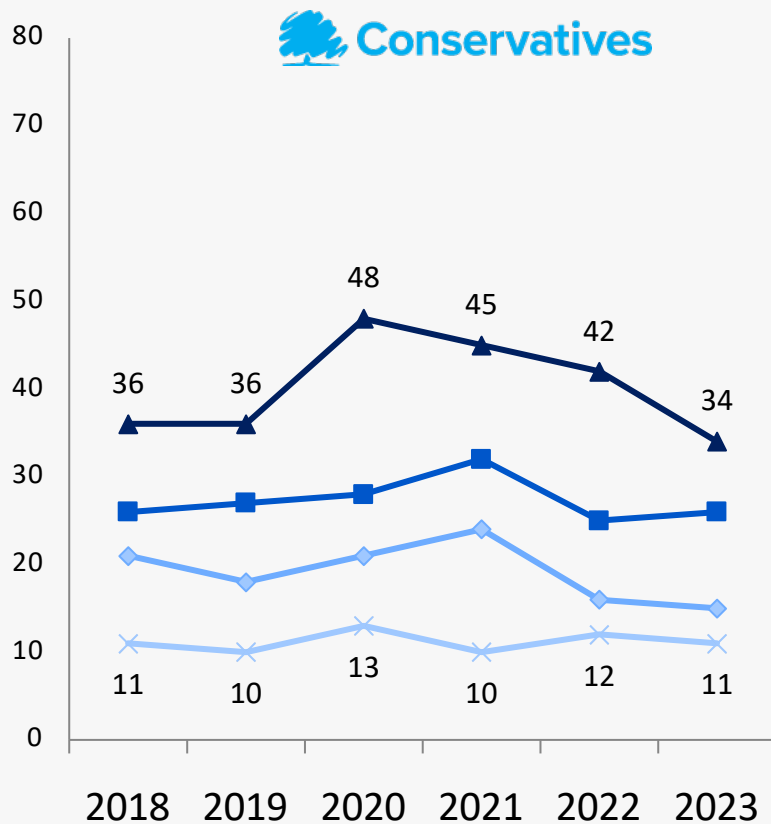
Which political party do you feel closest to?



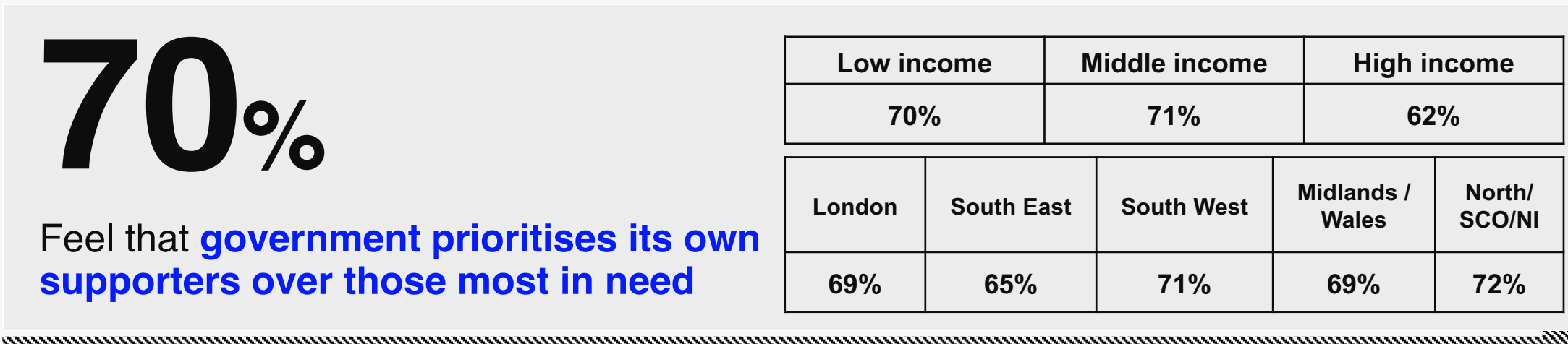
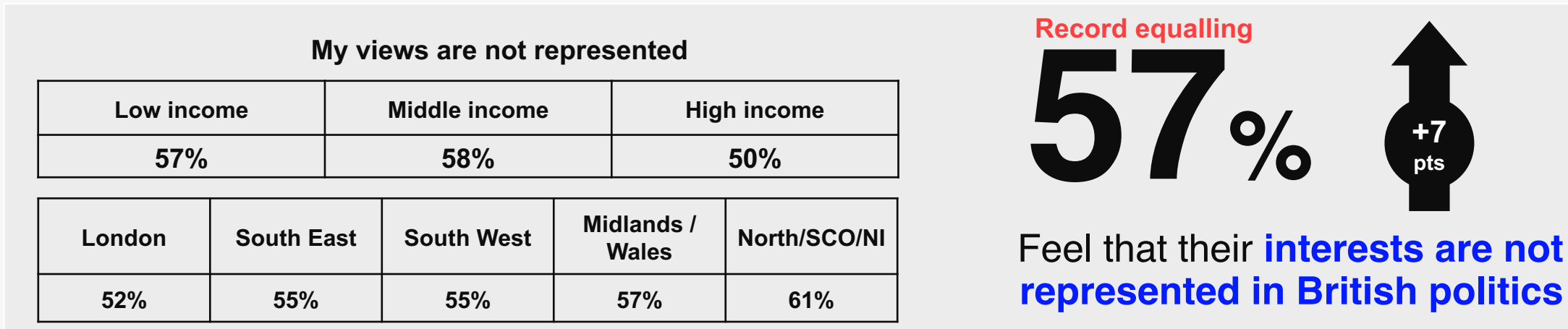
# Political disaffection remains high, particularly among younger groups, trust in the Conservatives at a 5-year low among boomers and millennials

Which political party do you feel closest to, or least distant from?

Gen Z   Millennial   Gen X   Boomer



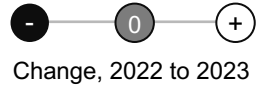
# Majority feel unrepresented in British politics



2023 UK Trust Supplement. Q5: To what extent do you feel your views are represented in British politics today? Q33. Thinking some more about the issues in this country, to what extent do you agree or disagree with the following? 'The government prioritises its own supporters more than people who are most in need of help' 7-point scale; top 3 box, agree. Base UK (3051), Low income (466), Middle income (2262), High income (241), London (390), South East (417), South West (247), North/SCO/NI (1090), Midlands/Wales (907)



# Politicians currently seen as an increasingly negative and divisive force



Percent of respondents that agree with the following...



Feel **politicians** are making things in this **country worse**



Feel the way **politicians** act today is making **society more divided**



Feel the way **politicians** behave **undermines people's trust** in government



# Discontent with politicians is felt strongly across the UK

Percent of respondents that agree with the following...

**77%** +14 pts

Feel **politicians** are making things in this **country worse**



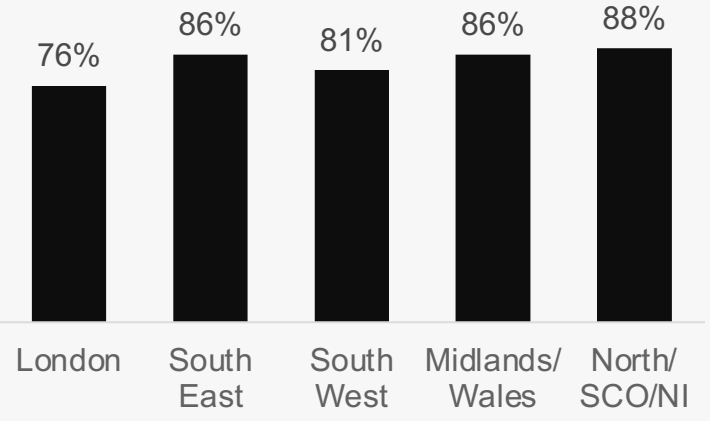
**80%** +7 pts

Feel the way **politicians** act today is making **society more divided**



**85%** +5 pts

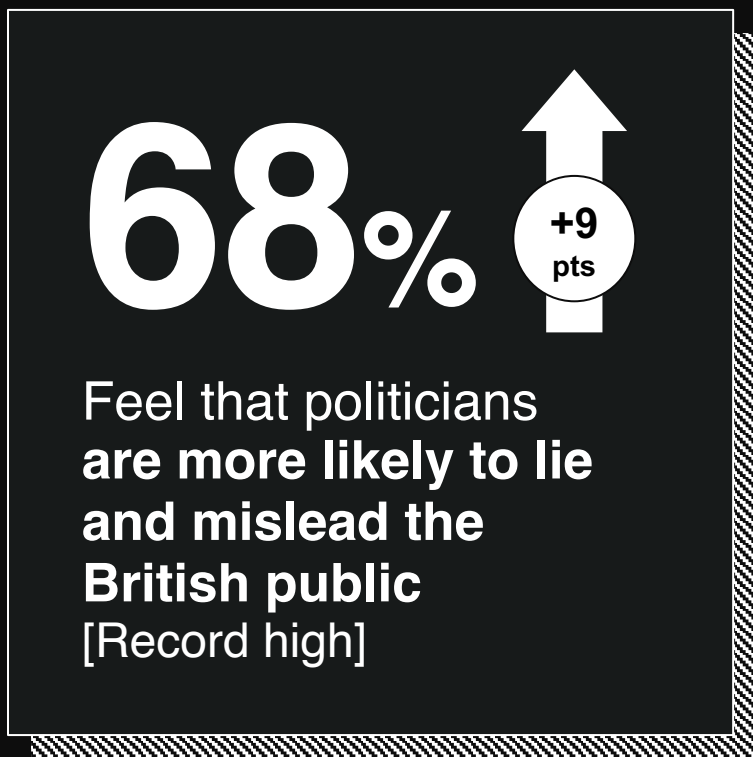
Feel the way **politicians** behave **undermines people's trust** in government





# Brits increasingly feel that politicians are lying

Percent who say, in the UK



## Politicians are...

	2020	2022	2023
A lot more likely to lie/mislead	29%	38%	45%
A little more likely to lie/mislead	27%	21%	23%
It hasn't changed	35%	35%	26%
A little less likely to lie/mislead	7%	3%	4%
A lot less likely to lie/mislead	2%	3%	2%

**+7 pts, Record high**

NB: question not asked for 2021

Older generations think more negatively towards politicians (Boomers 49% vs Gen Z 38% say they are a lot more likely to lie / mislead)



# Over 6 in 10 feel there needs to be a completely new type of political party to compete with the Conservative and Labour parties

Percent who say, in the UK

# 61%

Felt across groups, most strongly by Millennials, Gen X and those with middle incomes:

Feel that the country needs a completely **new type of political party** to compete with the Conservatives and Labour for power

Gen Z	Millennials	Gen X	Boomers
59%	64%	64%	58%

Low income	Middle income	High income
59%	62%	58%

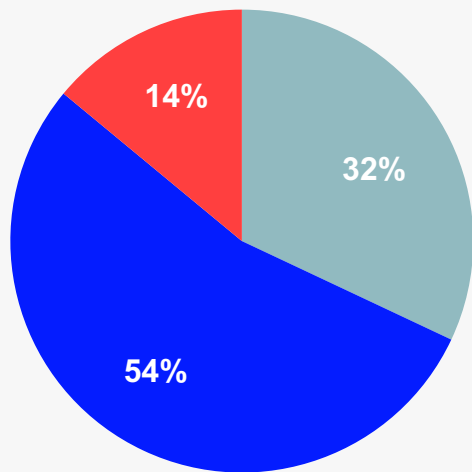
London	South East	South West	Midlands / Wales	North/SCO/NI
60%	60%	59%	61%	63%



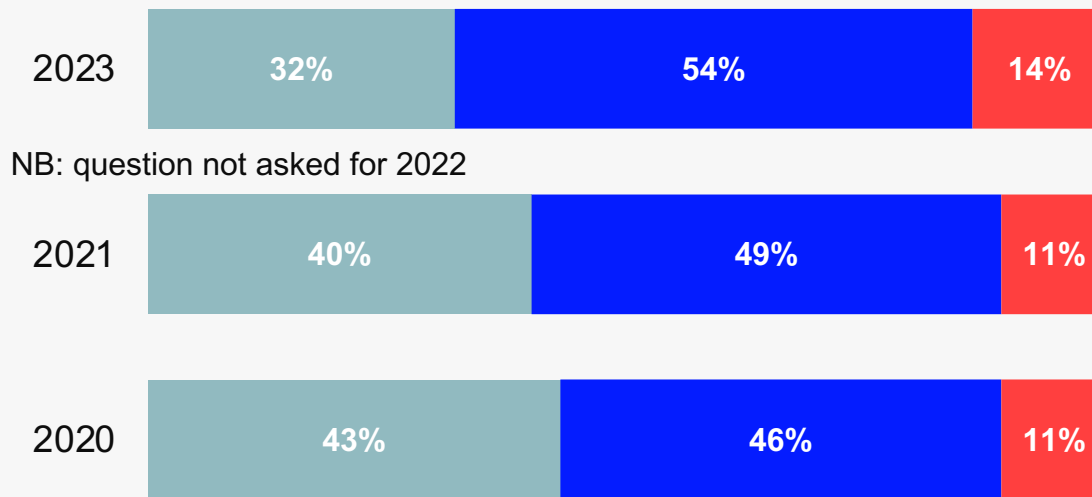
# There is 'Bregret' since the referendum, especially when compared to 2020

Current voting intentions towards Brexit

If you could vote again on the United Kingdom's membership of the European Union, how would you vote?

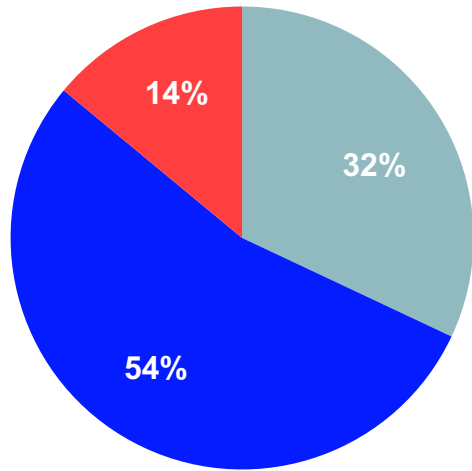


■ Leave ■ Remain ■ Abstain / prefer not to say

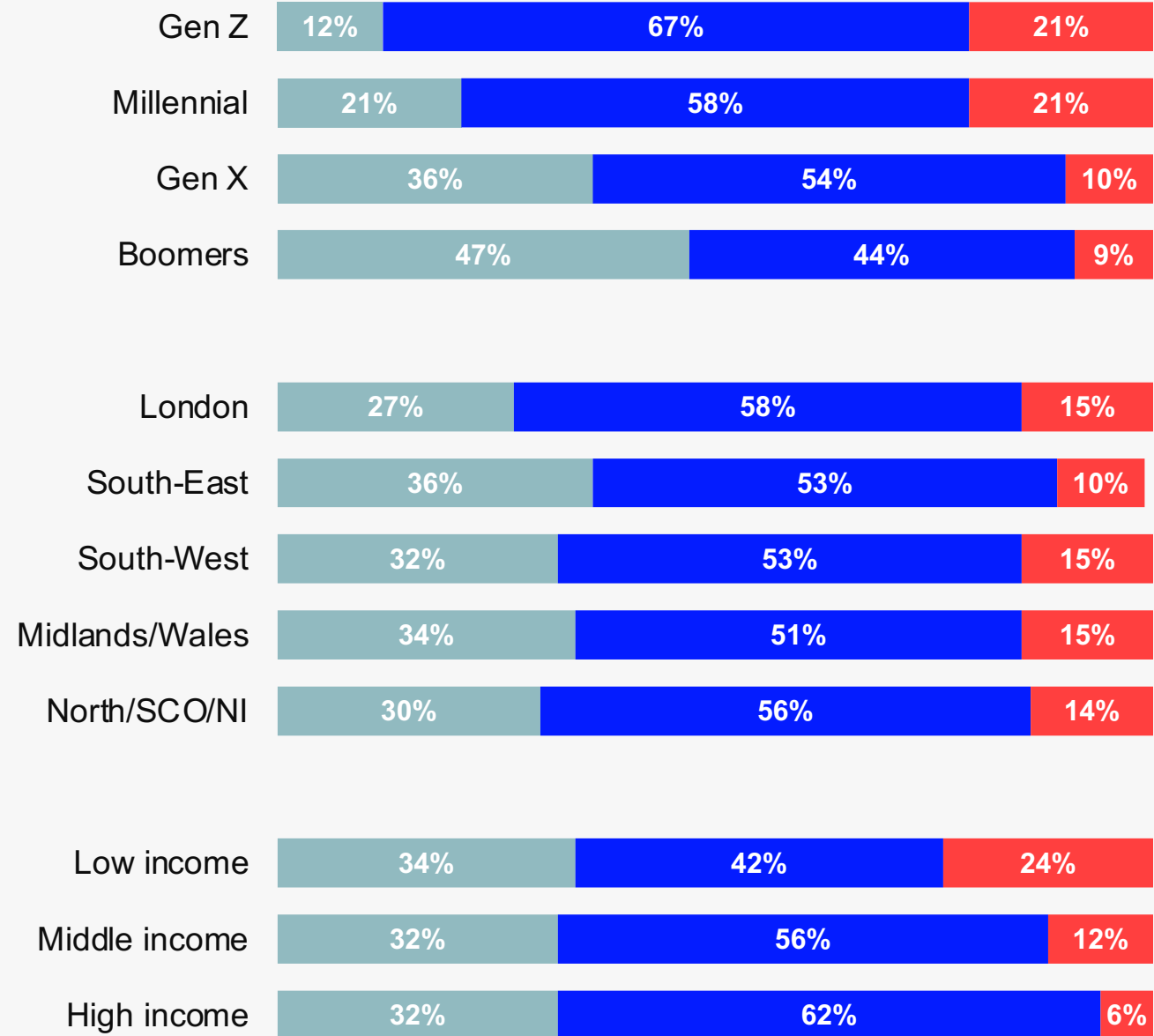


# Preference for remain across demographics, with Boomers the only exception

If you could vote again on the United Kingdom's membership of the European Union, how would you vote?



■ Leave ■ Remain ■ Abstain / prefer not to say



2023 Edelman Trust Barometer UK Supplement. C4. And if you could vote again on the United Kingdom's membership of the European Union, how would you vote? Base UK (3051), Gen Z (522), Millennial (796), Gen X (744), Boomer (989), London (390), South East (417), South West (247), North/SCO/NI (1090), Midlands/Wales (907), Low income (466), Middle income (2262), High income (241)



# A nation seeking new direction



# Division on how to deal with the issues facing the UK reaches record highs and spans geographies, demographics and affiliations

Percent who say, in the UK

# 72%

of people are **divided** on the key issues the UK is facing today

2020	2021	2022	2023
62%	64%	70%	72%

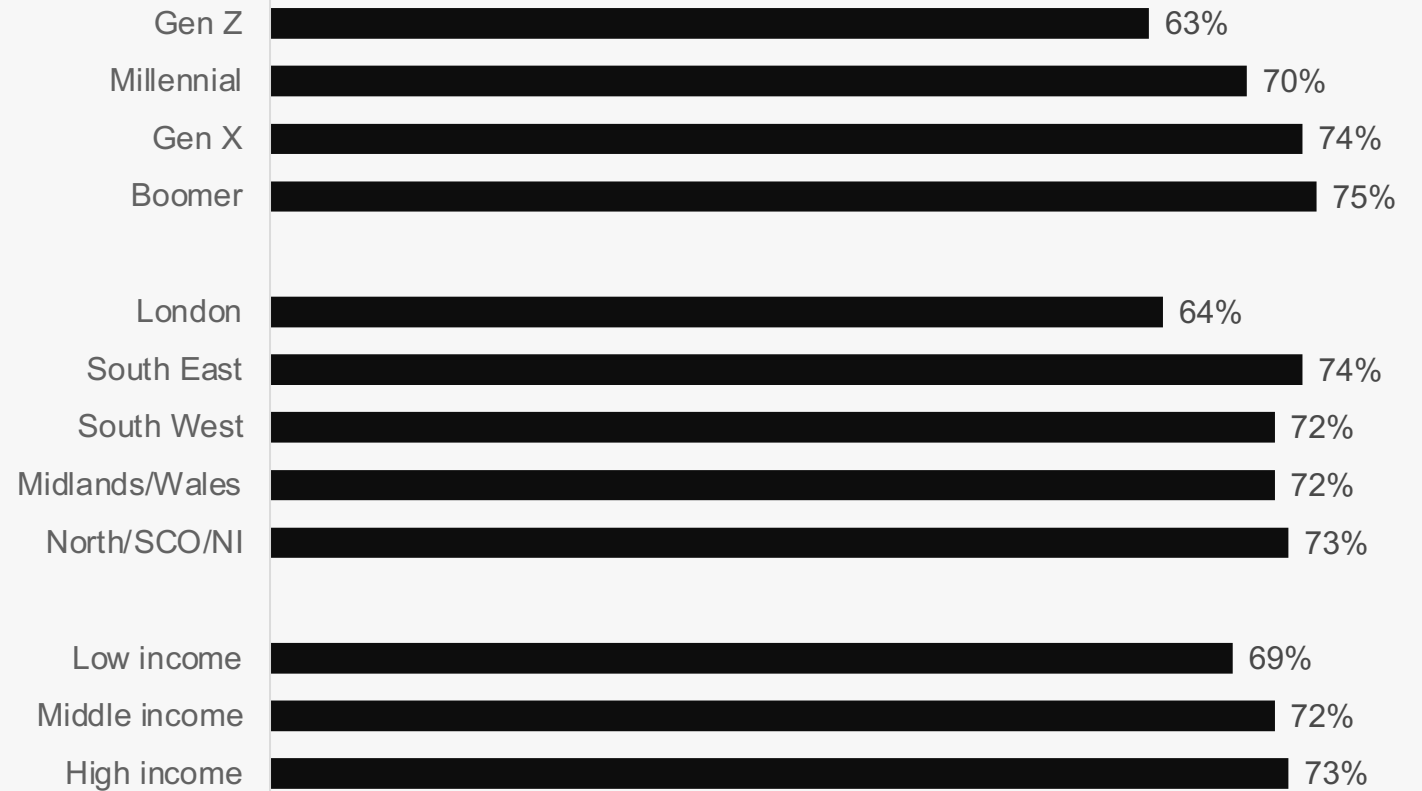


Similarly felt by supporters of both parties:

73%



71%



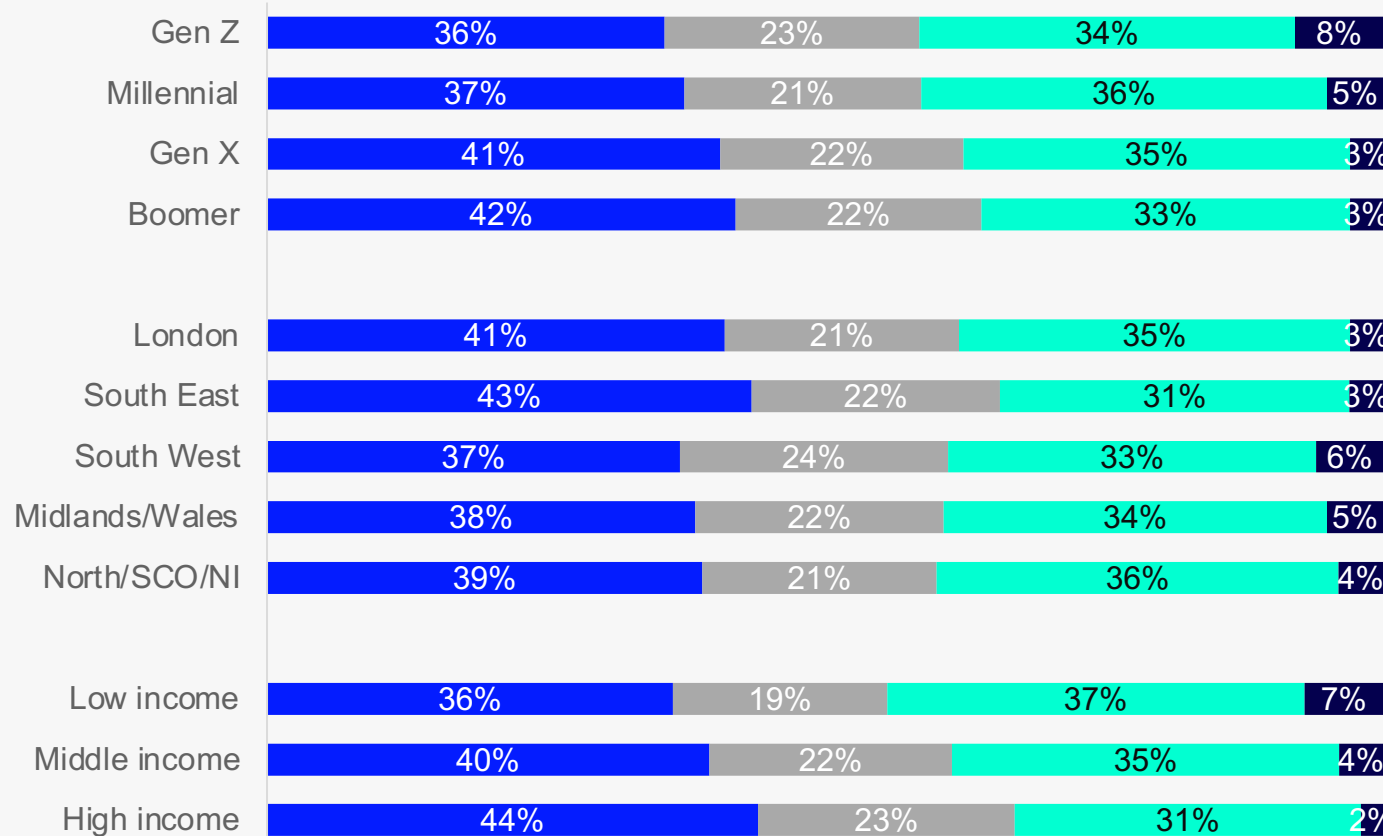
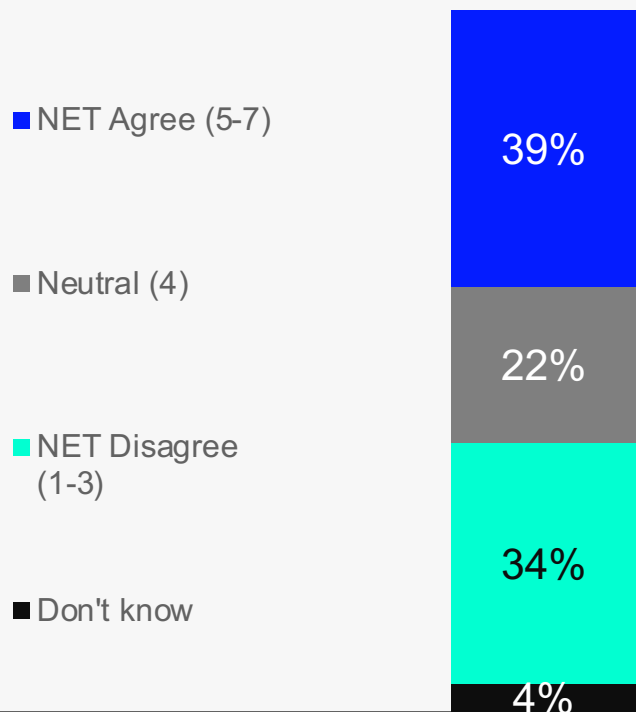
2023 Edelman Trust Barometer. Q4. Thinking about the key issues the UK is facing today, please select which statement best describes your opinion? where your opinion falls on the scale between each of the two paired statements. Base UK 2023 (3051), 2022 (2011) 2021 (2019), 2020 (2000), Gen Z (522), Millennial (796), Gen X (744), Boomer (989), London (390), South East (417), South West (247), North/SCO/NI (1090), Midlands/Wales (907), Low income (466), Middle income (2262), High income (241)



# Opinion is split with many unwilling to accept further hardship while current problems are being addressed

Extent agree with the following (7-point scale)

Personal hardship is a necessary reality while current problems facing this country are addressed

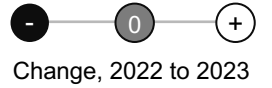


2023 Edelman Trust Barometer. Q33. Thinking some more about the issues in this country, to what extent do you agree or disagree with the following? Base: UK (3051), Gen Z (522), Millennial (796), Gen X (744), Boomer (989), London (390), South East (417), South West (247), North/SCO/NI (1090), Midlands/Wales (907), Low income (466), Middle income (2262), High income (241)

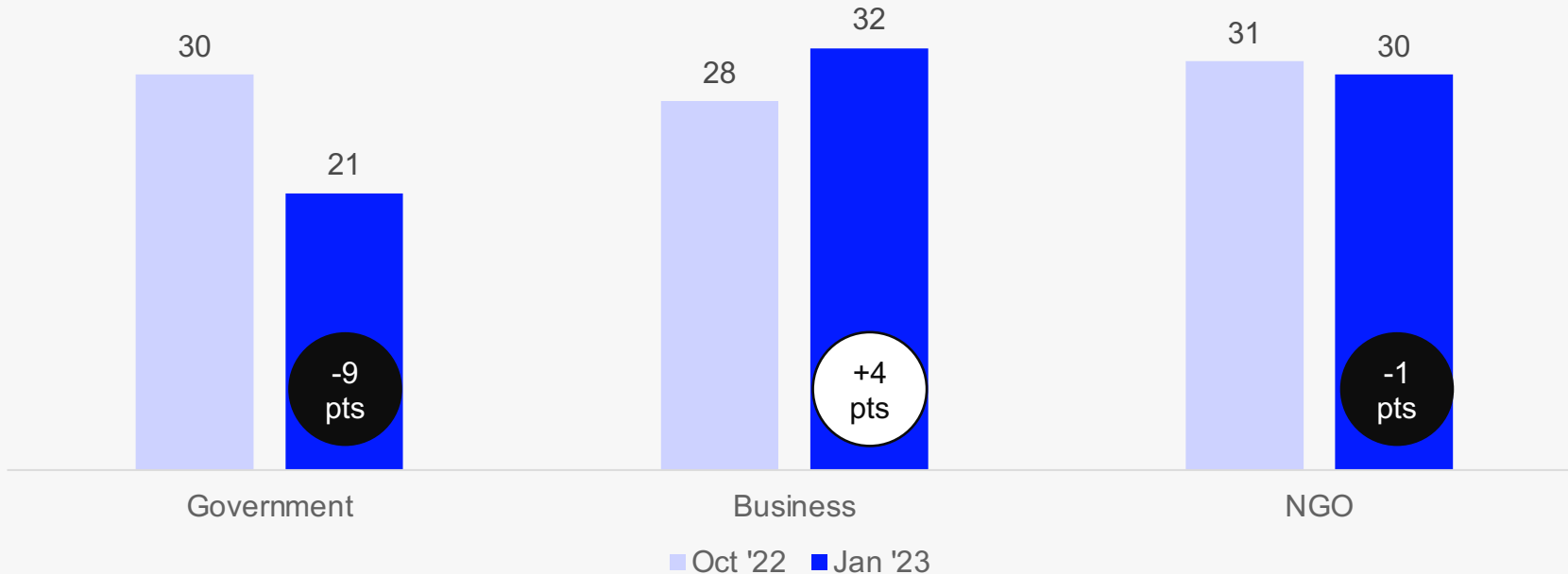


# Trust in institutions to alleviate the cost-of-living crisis is low and significantly down for government

Percent who say, in the UK



Trust in institutions to help alleviate issues caused by the cost-of-living crisis



## 'Your employer' seen as the only potential source trusted by a majority to alleviate the crisis

Your employer	56%
Local businesses	45%
Local public services	36%
Business in general	32%
NGOs	30%
Trade Unions	30%
The Labour Party	30%
Your local government	25%
Your local MP	25%
Government in general	21%
The Conservative Party	21%





# Views on how to deal with the country's problems often conflict with each other

Views on government spending and taxation, in the UK

## The government needs to...

...increase public spending to help deal with the difficulties facing this country



...reduce public spending

## Tax rises aimed at dealing with difficulties facing the UK...

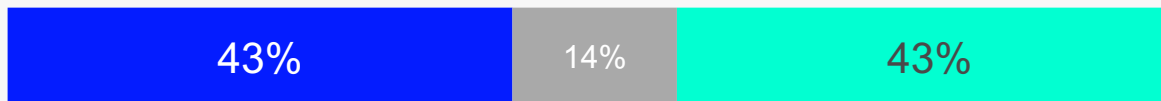
...have gone too far



...have not gone far enough

## Higher taxes are necessary to help deal with the difficulties facing this country...

...I am willing to accept this



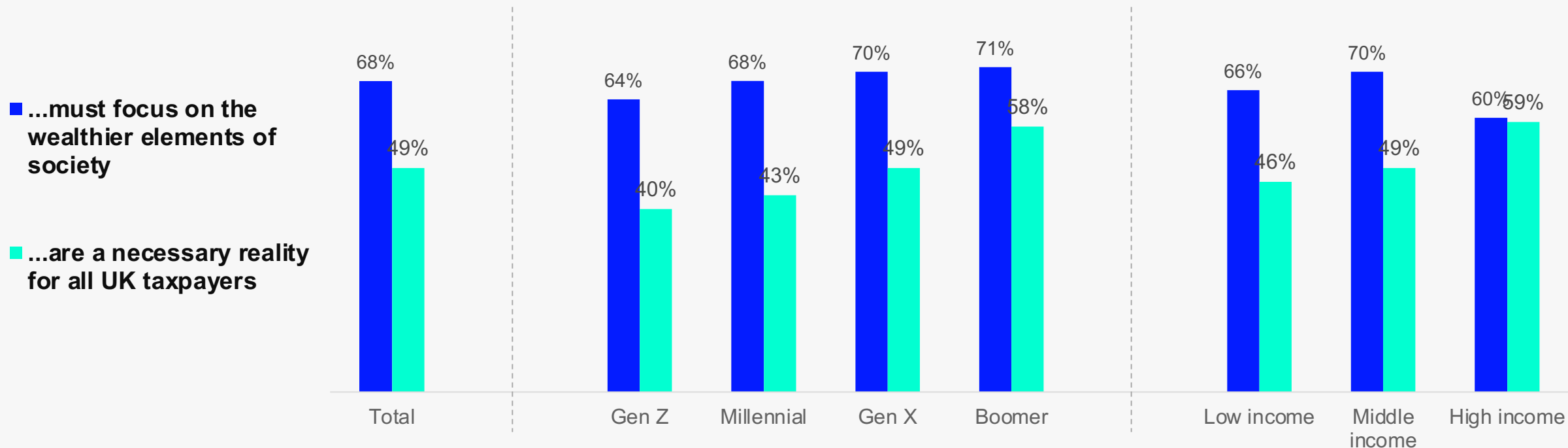
...I am not willing to accept



# Opinions are split on whether tax rises are a necessary reality, although most agree that tax must focus on the wealthy

Views on government spending and taxation, in the UK

## Tax rises aimed at dealing with difficulties facing the UK...



2023 Edelman Trust Barometer. Q4. Thinking about the key issues the UK is facing today, please select which statement best describes your opinion? where your opinion falls on the scale between each of the two paired statements. Q31. If the government were to increase taxes on the wealthiest 5% / 10% of people in the UK, which of the following impacts do you think would be most likely? Base: UK (3051), Gen Z (522), Millennial (796), Gen X (744), Boomer (989), Low income (466), Middle income (2262), High income (241).

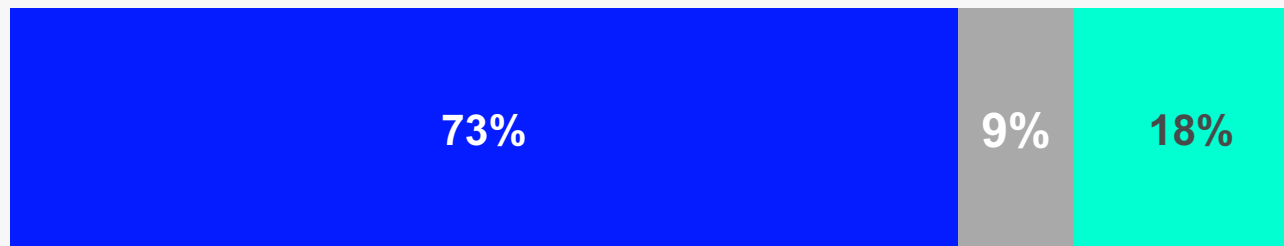


# In a climate of difficult challenges and decisions, there are strong calls for new thinking, ideas and approaches

Views on politics, in the UK

## Dealing with this country's problems requires...

...new thinking, ideas and approaches



...longstanding conventional wisdom

Need for new thinking felt across all groups, but most strongly among high income and Labour supporters:

Low	Middle	High	London	South East	South West	North/SCO/NI	Midlands/Wales	Conservative	Labour
69%	73%	76%	65%	71%	69%	75%	75%	64%	76%



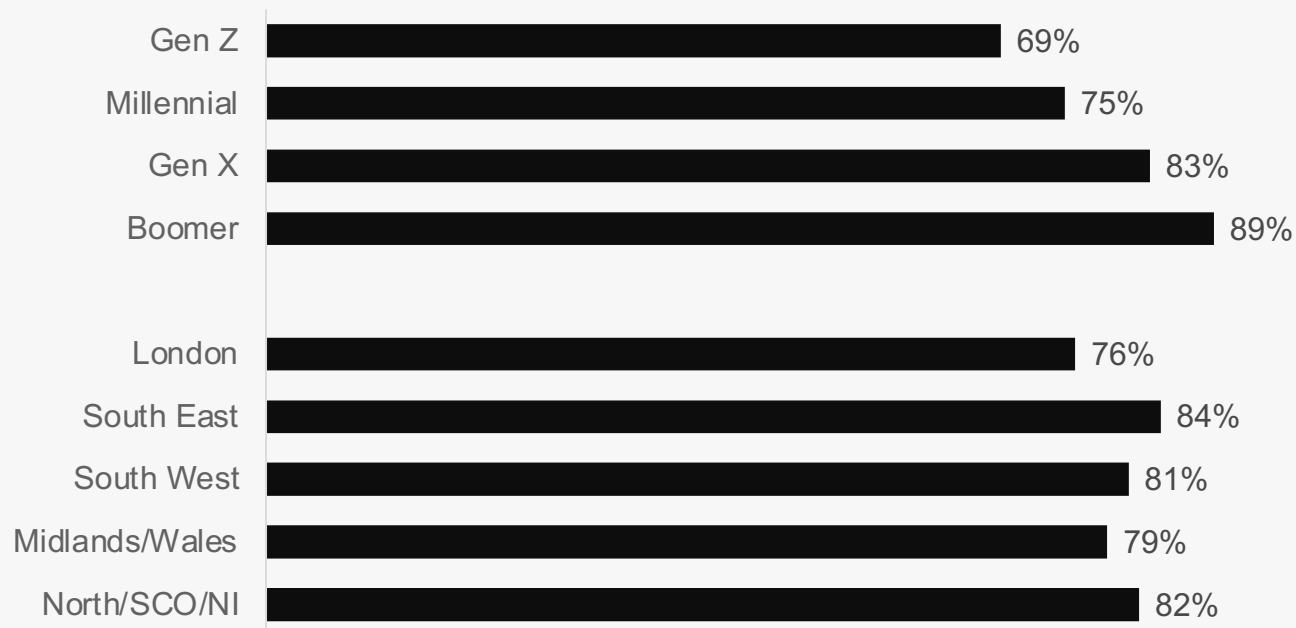
# Expectations of government and business



# Most feel business and government need to work together

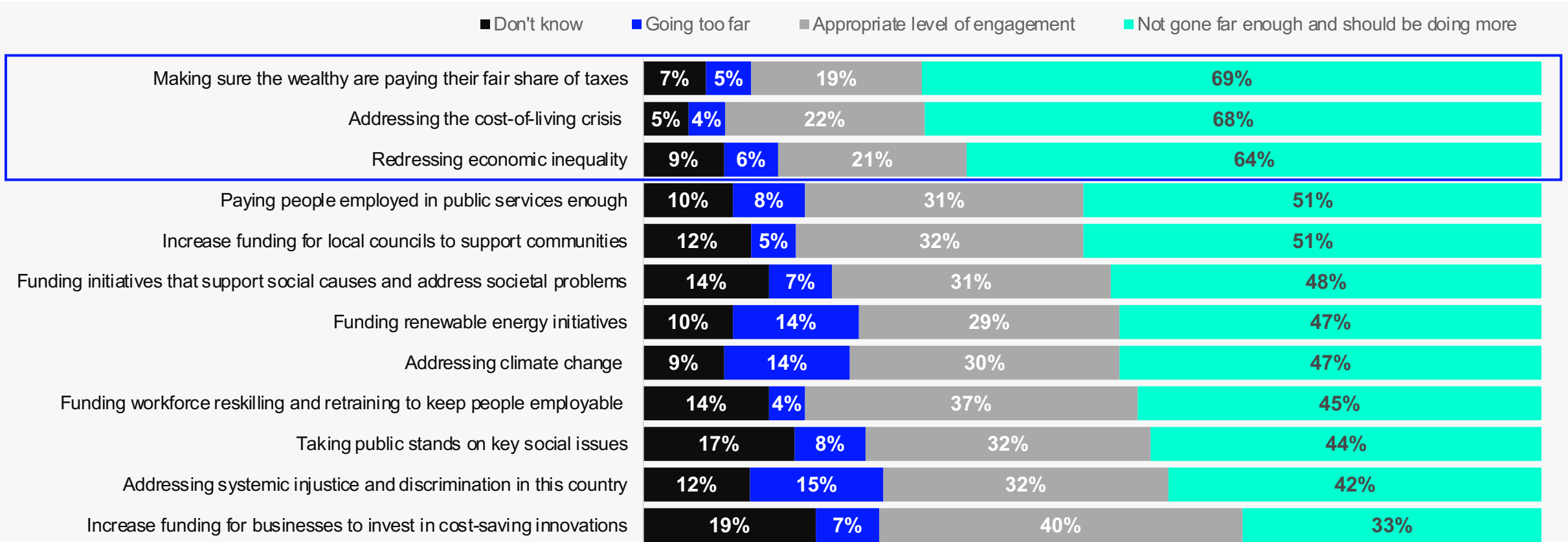
Percent who say, in the UK

## Business and government need to work together to address the issues the country faces



# Inequality and the cost-of-living crisis is where the government can do more

Government intervention, in the UK

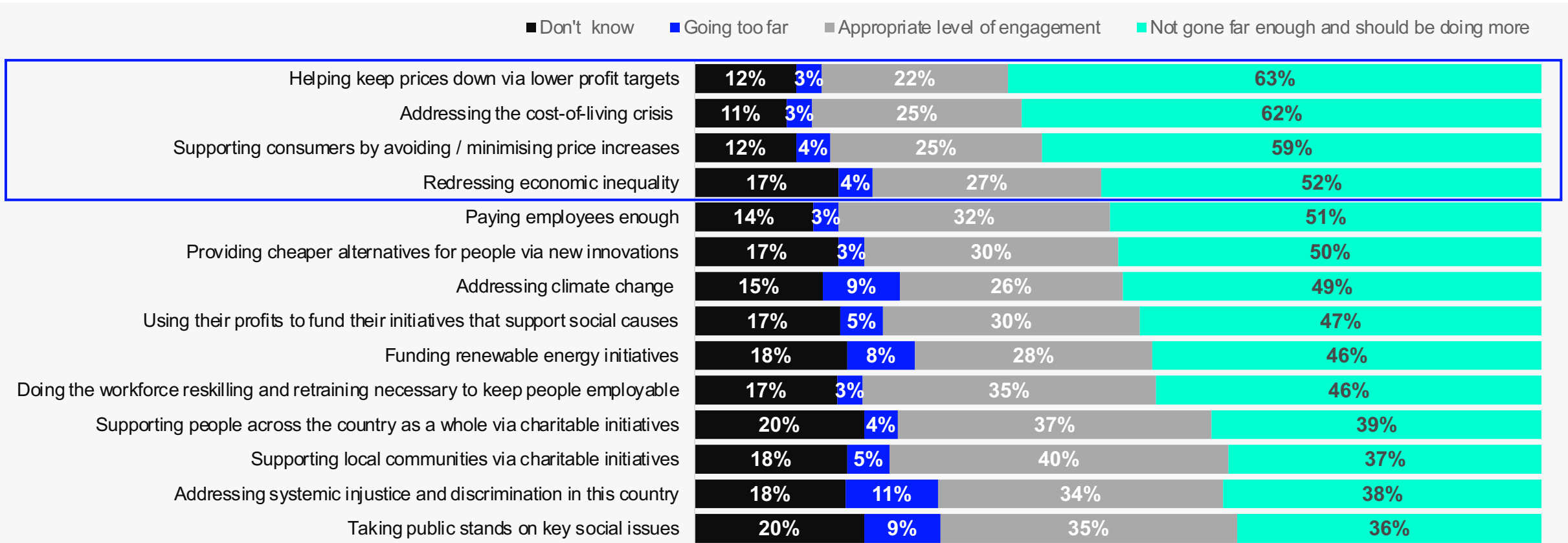


2023 Edelman Trust Barometer. Q35. When it comes to each of the following areas, please indicate if you think government is going too far and overstepping what it should be doing, is doing just the right amount in regard to this activity or is not going far enough in its actions and should be doing more. 3-point scale; code 3, "not doing enough"; code 1, "overstepping" Full statements in notes Base: UK (3051).



# Calls for business to do more on alleviating inequality and cost-of-living crisis

Business intervention, in the UK



2023 Edelman Trust Barometer. BUS\_BND. Think about business as an institution, and its current level of engagement in addressing societal needs and issues. When it comes to each of the following areas, please indicate if you think business is going too far and overstepping what it should be doing, is doing just the right amount in regard to this activity, or is not going far enough in its actions and should be doing more. 3-point scale; code 3, "not doing enough"; code 1, "overstepping". Full statements in notes Base: UK (3051).



# 2023 Edelman Trust Barometer

UK Supplement Report

