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2022 Edelman Trust Barometer Special Report

THE NEW CASCADE OF INFLUENCE

June 2022

2022 EDELMAN TRUST BAROMETER SPECIAL REPORT: THE NEW CASCADE OF INFLUENCE

Methodology

Age definitions referred to throughout this report:

- Young Gen Z = ages 14-17[1]
- Adult Gen Z = ages 18-26
- Millennials = ages 27-41
- Generation X = ages 42-55
- Anyone over age 55 is referred to as 56+

When analyzing historical data, age bands have been adjusted to reflect the generation for each year.

[1]If no 14-17 data is shown, this question was not asked among this age cohort.

ONLINE SURVEY OF ADULTS AGE 18+

Fieldwork : **May 13 – May 24, 2022**

14 countries

13,700+ respondents

1,000* respondents/country

All data is nationally representative based on age, region and gender.

*Total sample was less for India (n931), Saudi Arabia (n895), UAE (n888), and the U.S. (n993)

Brazil	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	South Africa	South Korea	UAE	UK	U.S.

ONLINE YOUTH SURVEY AGE 14-17

Fieldwork : **May 13 – June 6, 2022**

14 countries

6,700+ respondents

500** respondents/country

All data is nationally representative based on region and gender. See Technical Appendix for more details about the weighting of this sample.

**Total sample was less for S. Korea (n495) and UAE (283)

A FIGHT FOR OUR FUTURE

GEN Z COMES OF AGE AMIDST A CRESCENDO OF BRAND ACTIVISM

2018: BUYING ON BELIEF GOES MAINSTREAM

Percent who buy brands on their beliefs & values…

June 2018

64%

+13 pts

Change, June 2017 to June 2018

2020 – 2022: PORTFOLIO OF ISSUES FOR BRANDS TO ADDRESS EXPANDS

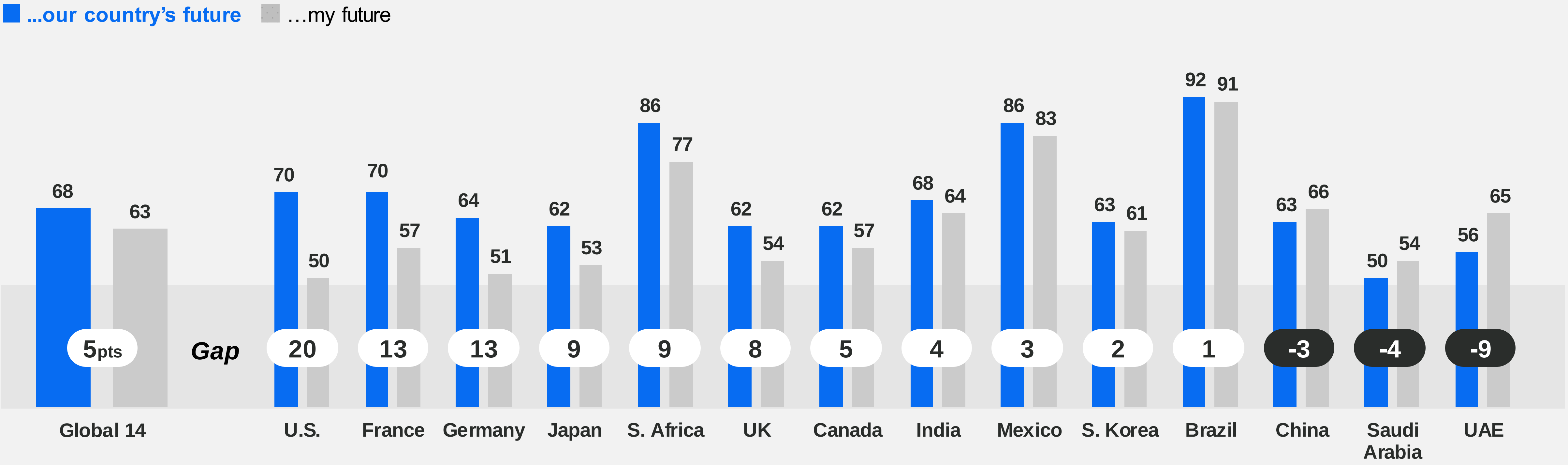
Percent changing buying behavior because of a brand's response to…

Covid-19 Pandemic	MAR 2020	45%
Racial Justice	JUN 2020	60%
Employee Treatment	JUN 2021	75%
Climate Change	NOV 2021	64%
Geopolitics	MAY 2022	47%
Economic Inequality	JUN 2022	60%

For details on the source of each set of data above please refer to the Technical Appendix.

MORE CONCERNED ABOUT OUR COUNTRY THAN ABOUT MYSELF

Percent who say **I am worried** about…



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. PERS_EMO. How much do you worry about each of the following? 9-point scale; top 4 box, worried. General population, 14-mkt avg.

In our feed-first world, we all feel the urgency for action.

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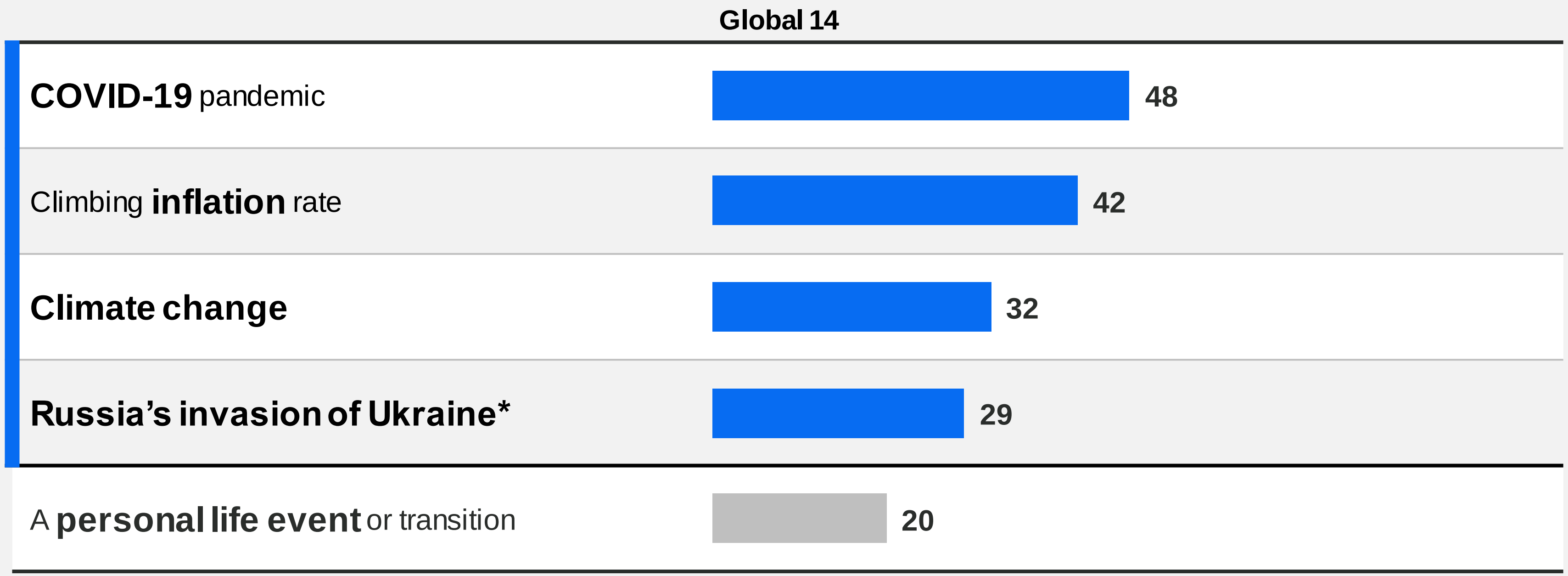
BRAND RESPONSE TO OUR SOCIETAL ISSUES MATTERS MORE THAN MY LIFE EVENTS

Percent who say their brand choices have changed in the last few years because of how a brand responds to these events

This has had an **impact** on my brand choices



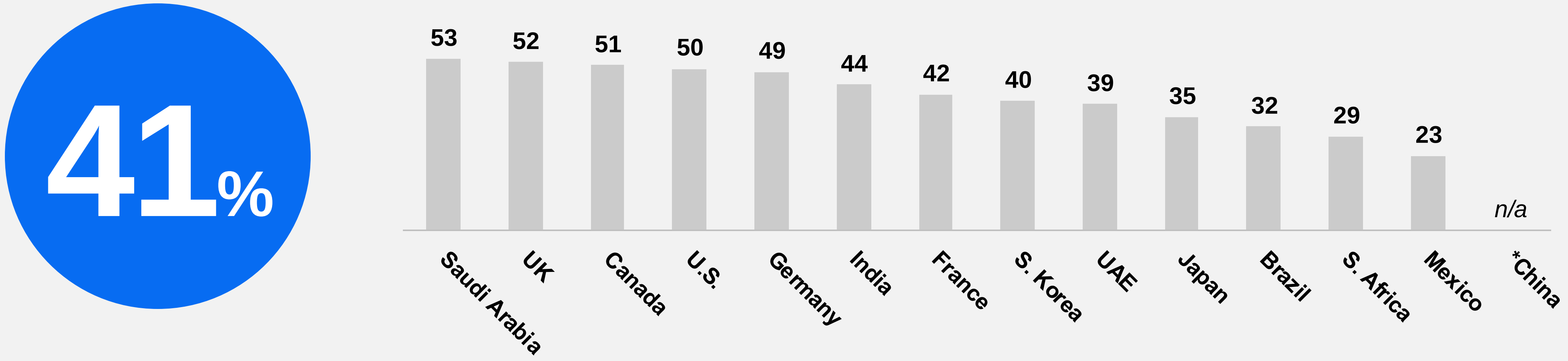
Personal major life events less likely to influence buying

4 IN 10 BOYCOTT BRANDS OVER RUSSIA RESPONSE

Percent who agree

I am boycotting brands still **doing business in or with Russia**

Global 13 Not asked in China

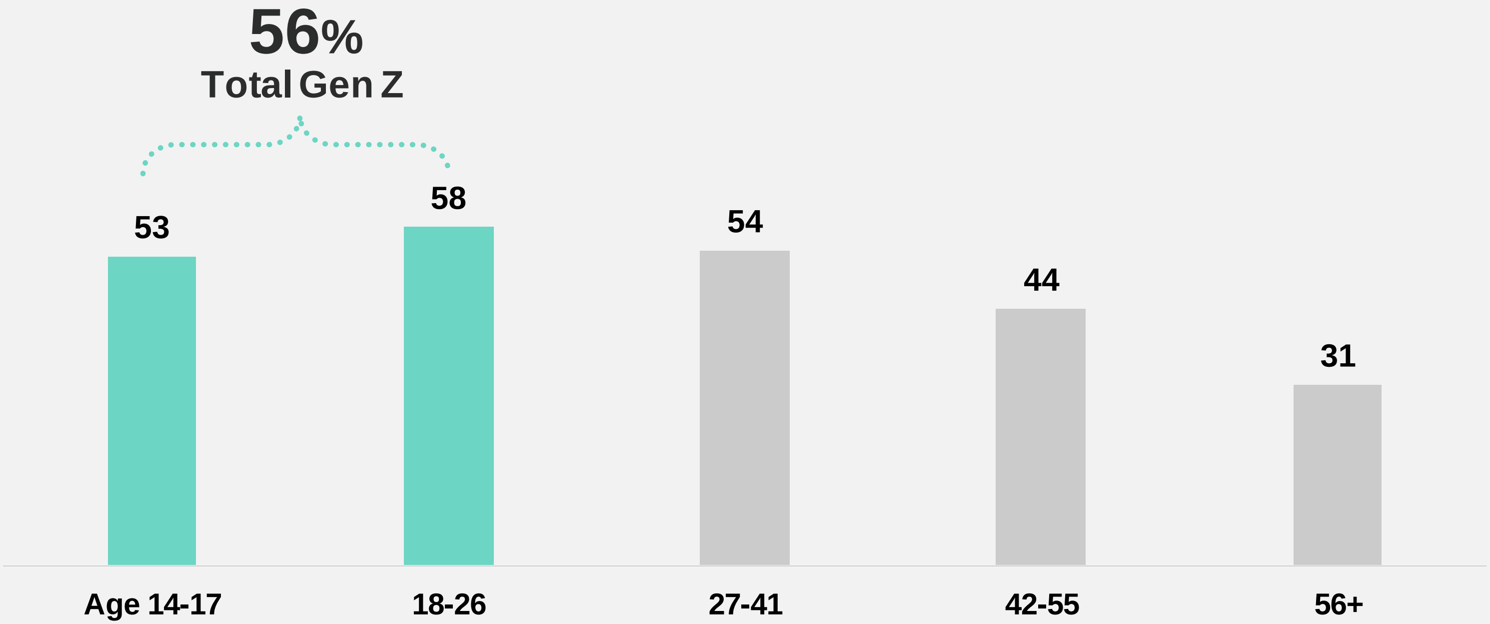


THE LAST CHANCE GENERATION: GEN Z FIGHTING FOR ITS FUTURE

Percent who worry about most or all of the issues measured

Issues related to

Security | Health | Finances | Social connections | Keeping up with change



	Age 14-17	18-26	27-41	42-55	56+
Avg number of worries *(out of 12 measured)*	***7.2***	***7.7***	*7.2*	*6.4*	*5.0*

2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. PERS_EMO. How much do you worry about each of the following? 9-point scale; top 4 box, worried. General population, 14-mkt avg., by age; and the youth sample (question shown to half of the sample). “Total Gen Z” is a weighted average of 14-17- and 18–26-year-olds. Data shown is a net of those who worry about 8 or more of 12 issues measured (excludes attributes 2 and 3).

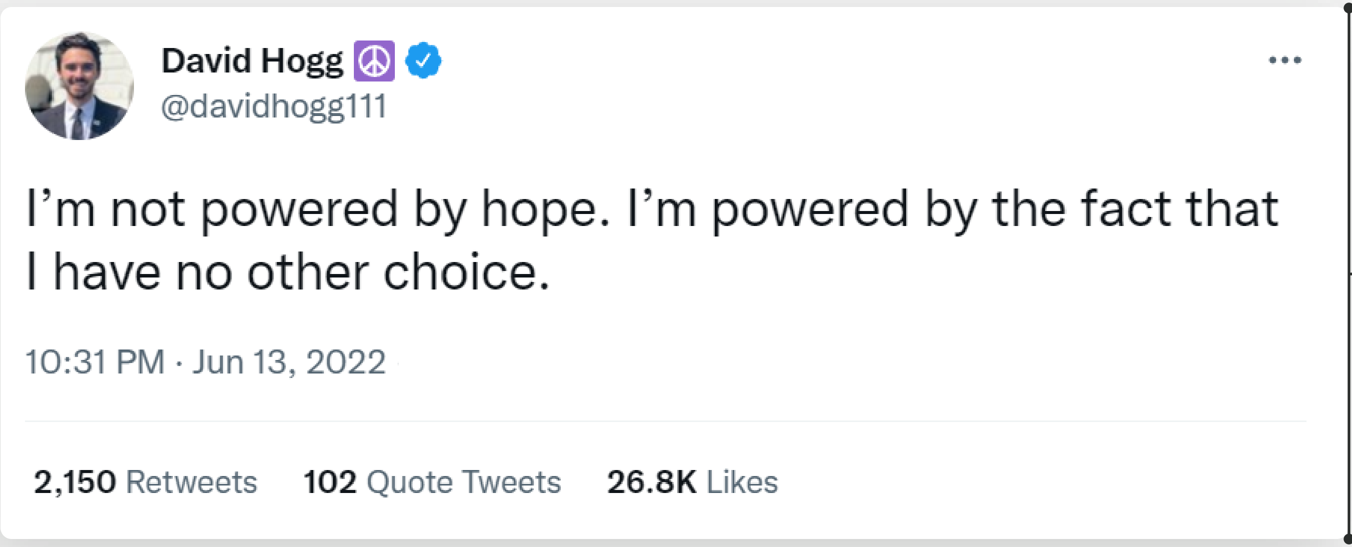
GEN Z'S GRAVITATIONAL PULL

GEN Z POWERED, NOT PARALYZED, BY FEAR

Global 6

70%

of Gen Z say they are involved in a social or political cause



David Hogg, 22, American gun control activist and high school shooting survivor

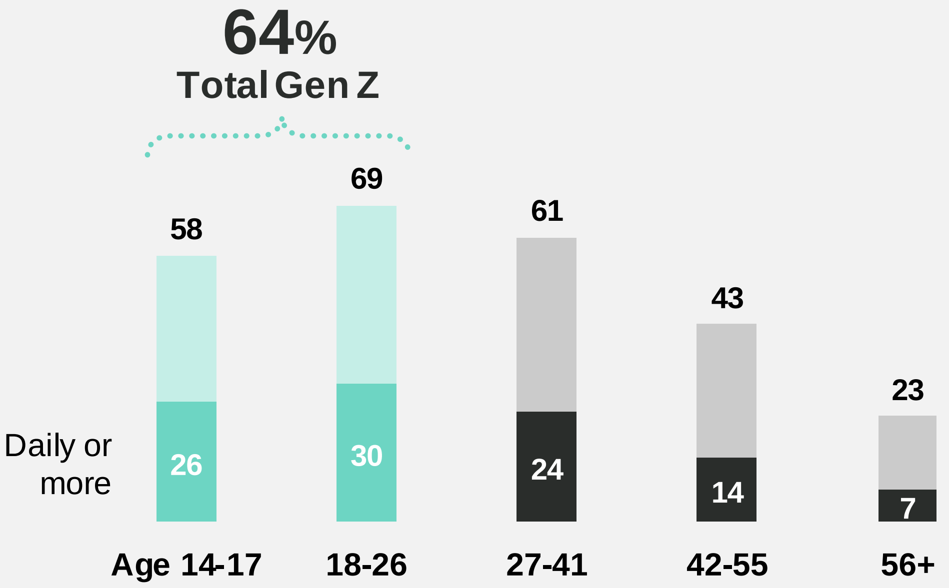
2021 The Power of Gen Z. Q24. To what extent, if at all, are you currently involved in taking action to advance a social or political cause? Pick all that apply. 6-mkt avg., among 14-24-year-olds. Data shown is a net of attributes A-P.

GEN Z DOMINATES THE INFRASTRUCTURE OF INFLUENCE

Percent who say

GEN Z CREATES THE CONTENT

I create or share online content weekly or more



GEN Z IS CHANGING HOW WE CONSUME IT

Teenagers and college-aged people influence how we…

Global 14
63%
Get our news

Global 14
60%
Watch movies and TV

GEN Z LEADS THE FIGHT FOR RACIAL JUSTICE IN AMERICA

Percent who say they have done each in response to racism in the U.S.

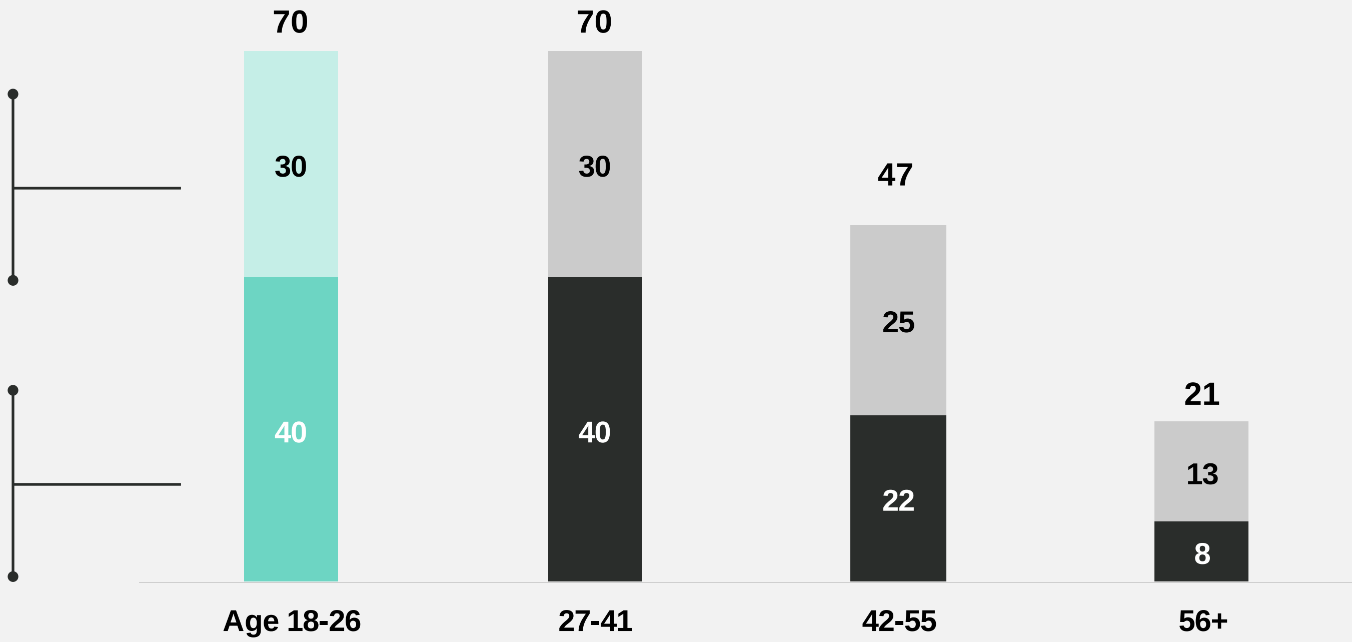
I have **advocated** or **acted** against racism

Advocates only

- Supported product boycotts
- Posted anti-racist content
- Signed petitions to support anti-racist initiatives
- Liked or reposted anti-racist content

Activists

- Communicated with political or business leaders
- Attended public protests
- Campaigned for political candidates
- Volunteered with organizations fighting racism



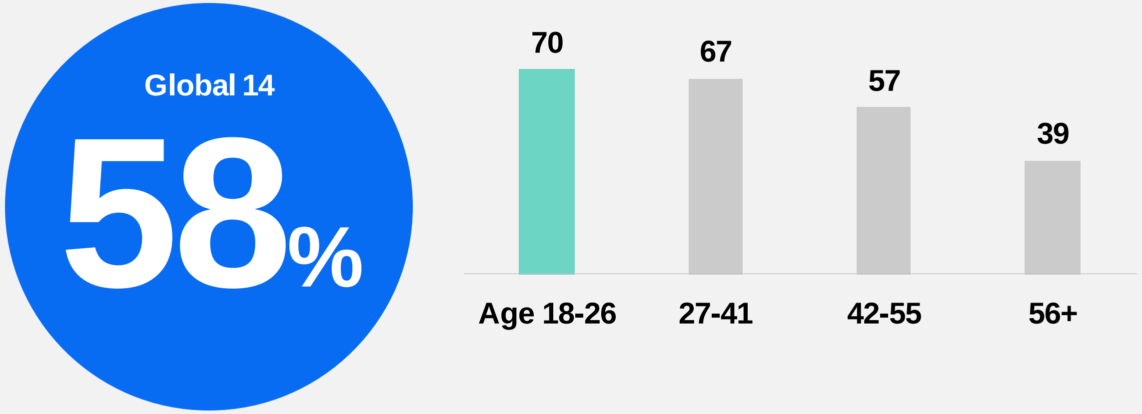
2022 Edelman Trust Barometer Special Report: Business and Racial Justice in America. Activist groupings. General population, U.S., by age. For more information on how these groupings were created please refer to the Technical Appendix.

GEN Z WIELDS TREMENDOUS INFLUENCE

Percent who say
Teenagers and college-aged people influence…

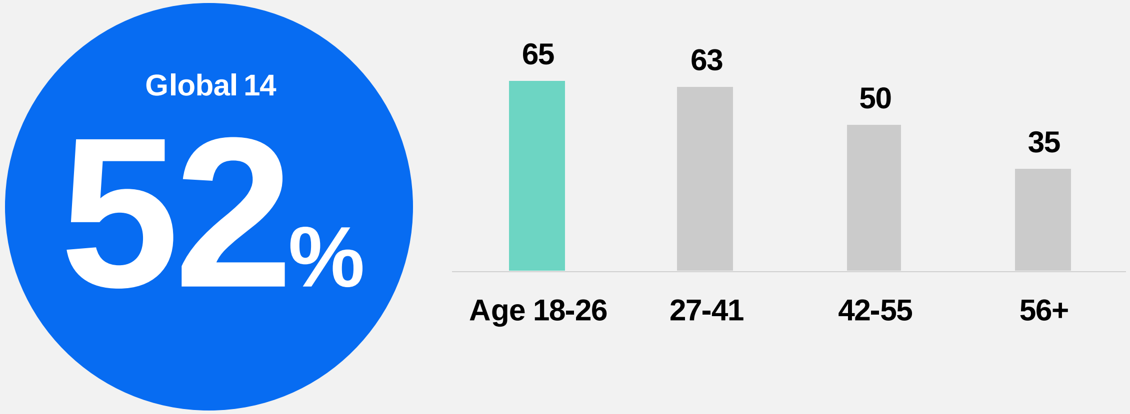
What we buy (avg)

How green or diverse my brands need to be
If my brands need to take stands
Products I use
How I talk with and about brands
How I shop



How we create change

How I support the causes I care about



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? 5-point scale; codes 3-5, moderately or more. Attributes shown to half of the sample. General population, 14-mkt avg., and by age. "What we buy" is an average of attributes 1, 4-10, and 13.

GEN Z INFLUENCE ALSO EXTENDS TO HOW WE WORK AND SAVE

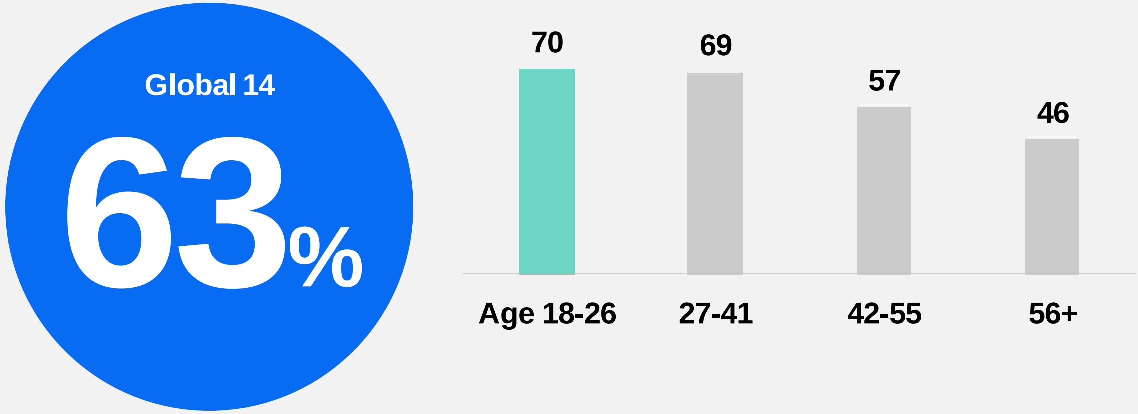
Percent who say
Teenagers and college-aged people influence…

Our work culture

What I expect from my employer

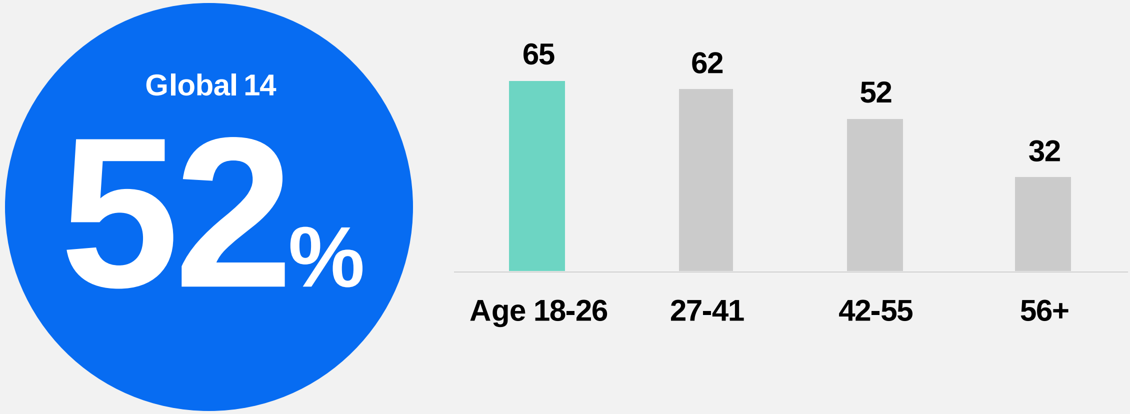
How I work

My willingness to pressure my employer to change



Our financial behavior

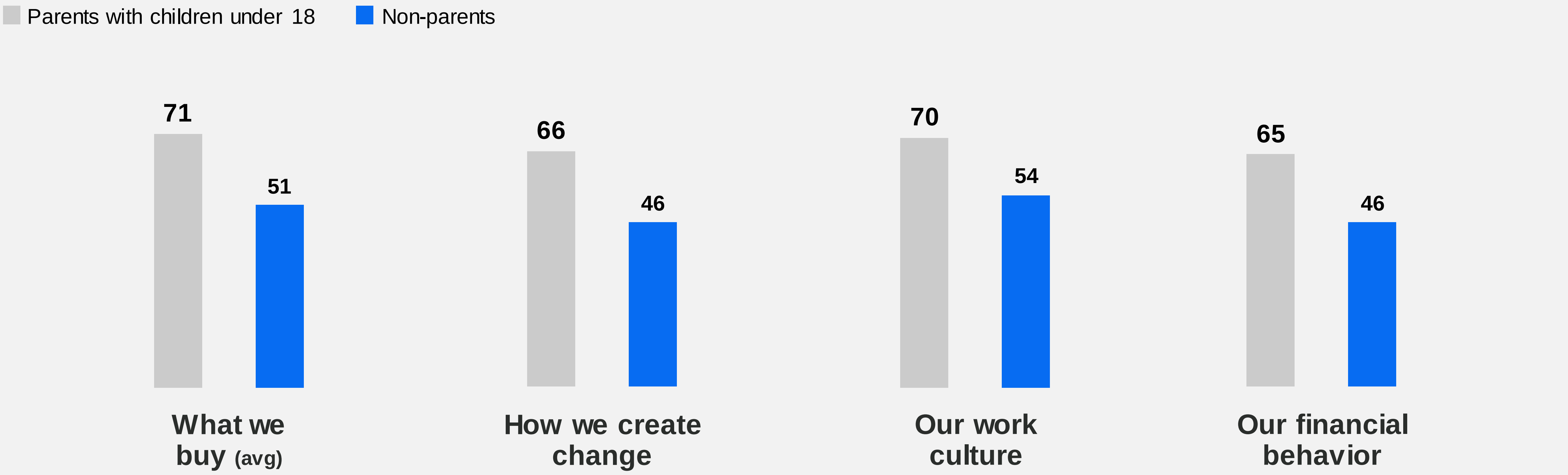
How I save and invest my money



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? 5-point scale; codes 3-5, moderately or more. Attributes shown to half of the sample. General population, 14-mkt avg., and by age. "Our work culture" (attribute 17) only shown to employees of an organization (Q43/1) across the full sample.

EVEN THOSE WITHOUT CHILDREN INFLUENCED BY GEN Z

Percent who say
Teenagers and college-aged people influence…



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. KID_INFLU. To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people? 5-point scale; codes 3-5, moderately or more. Attributes shown to half of the sample. General population, 14-mkt avg., by parents with children under 18 (S21/1-2) and non-parents (S21/98). "What we buy" is an average of attributes 1, 4-10, and 13. "Our work culture" (attribute 17) only shown to employees of an organization (Q43/1) across the full sample.


GEN Z
INFLUENCES
BRAND ACTIVISM
Edelman
17

2017 TO 2022: BRANDS ARE BETTER PARTNERS FOR CHANGE THAN GOVERNMENT

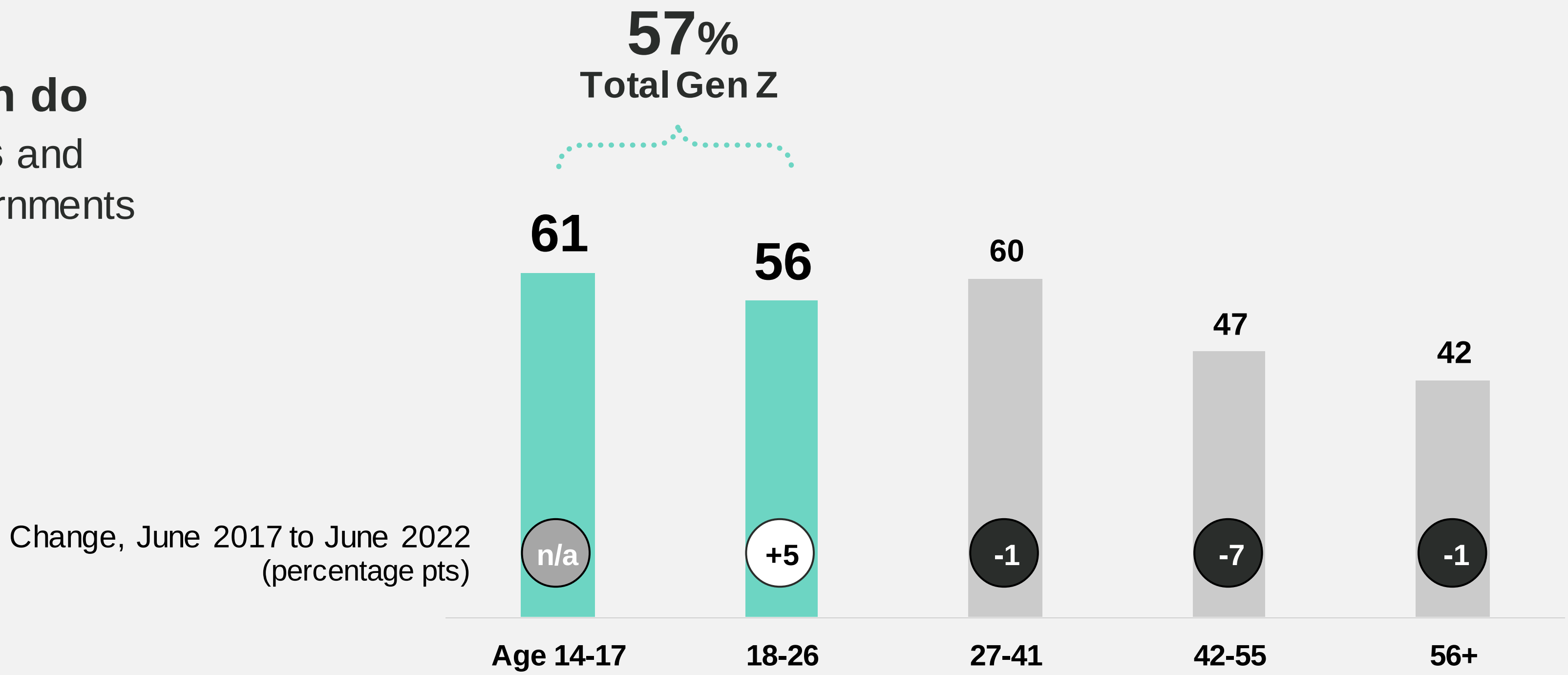
Percent who agree

- 0 +

Change, June 2017 to June 2022

Global 11

In many cases, **brands can do more to solve social ills** and societal problems than governments



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. BDB_Q17. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. General population, 11-mkt avg., by age; and the youth sample (question shown to half of the sample). "Total Gen Z" is a weighted average of 14-17- and 18–26-year-olds.

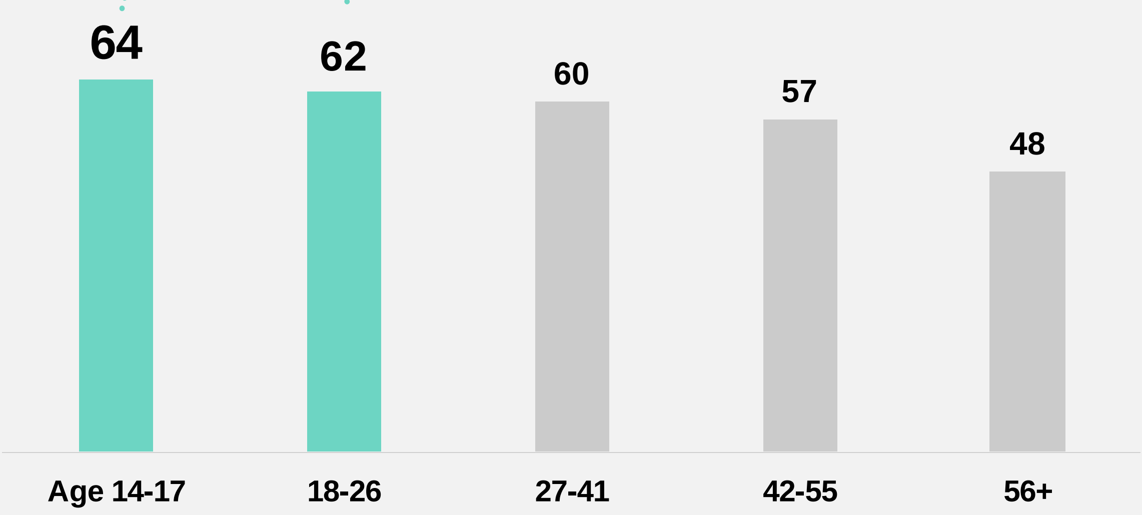
GEN Z SEEK SHARED ACTION WITH BRANDS

On average, percent who say

62% Total Gen Z

I want to work with brands

to address societal issues



Across issues such as

- Climate change
- Poverty
- Racism
- Information quality
- Gender inequality

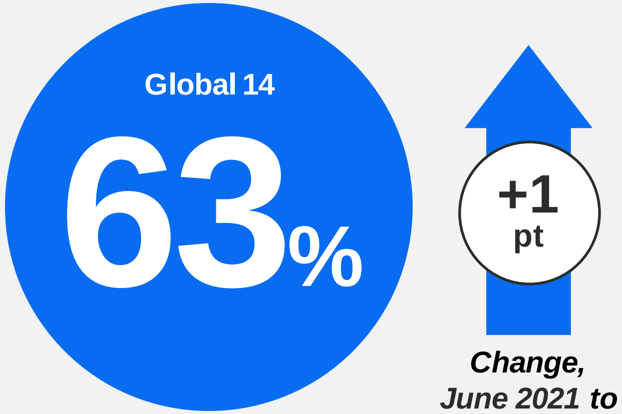
2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. LEAD_PART. For each of the following, what level of involvement would you like to have in helping to address this issue versus what you would like brands to be doing? 6-point scale; codes 2-4, brands give me a role or support me. General population, 14-mkt avg., by age; and the youth sample (question shown to half of the sample). "Total Gen Z" is a weighted average of 14-17- and 18–26-year-olds. Data shown is an average of attributes 1, 2, 4, 7, and 8.

YOUNG GEN Z DOUBLES DOWN ON ACTIVISM VIA BRAND CHOICE

Percent who say

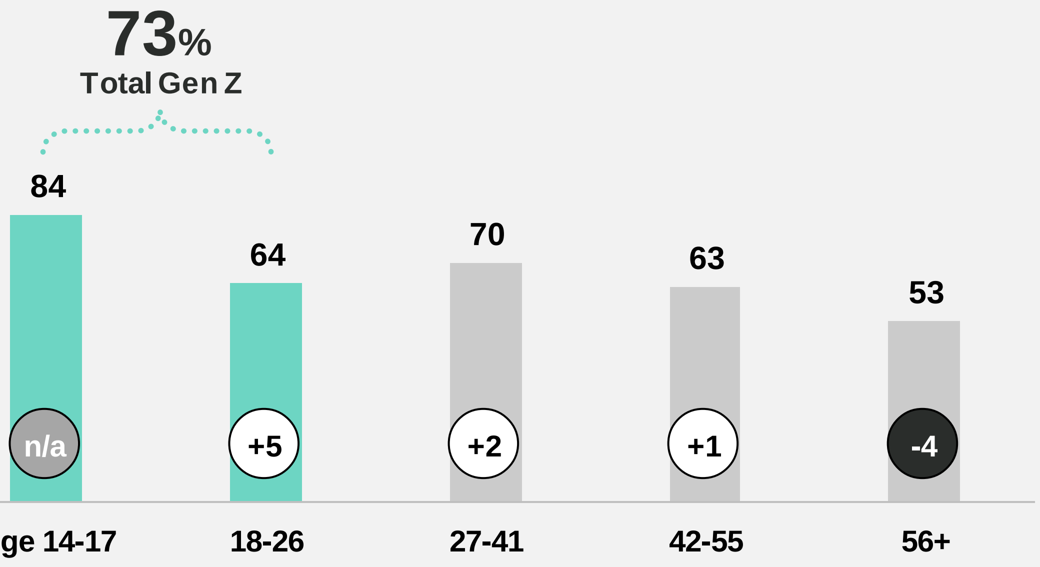
Change, June 2021 to June 2022

I buy or advocate for brands
based on my beliefs and values



Change, June 2021 to June 2022

More than 8 in 10 young Gen Z buy on beliefs; greatest increase among adult Gen Z



GEN Z TRUSTS VOICES AND INFLUENCERS THAT BRING TANGIBLE EXPERTISE AND IMPACT

TOP 3 CREDIBLE SPOKESPEOPLE

Percent who say each would be **credible as a brand spokesperson/ambassador**

	Age 14-17	18-26	Total Gen Z
A scientist/**expert**	67	66	66
A person like me **who uses the brand**	63	62	61
A **brand technical expert**	58	59	58

TOP 3 QUALITIES OF TRUSTED INFLUENCERS

Among those who follow an influencer, **why they pay attention to them and trust what they say**

	Age 14-17	18-26	Total Gen Z
They teach me **new skills**	45	39	40
Recommendations based on **experience**	40	37	37
Share **my values**	38	36	35

2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. ABILITY_SPK_A. If a brand were to use each of the following as their spokesperson/brand ambassador, how credible or believable would you consider them to be? 4-point scale; top 2 box, credible. INFLU_TRU. Why do you pay attention to and trust what the influencers that you follow have to say? Pick all that apply. Question asked to those who follow influencers (INFLU1_A/1). General population, 14-mkt avg., by age; and the youth sample (question shown to half of the sample). "Total Gen Z" is a weighted average of 14-17- and 18–26-year-olds. Order is based on top 3 rank for Total Gen Z, ties broken by decimals.

2018 TO 2022: SOCIAL MEDIA NO LONGER THE EPICENTER FOR SOCIETAL CHANGE

Among those who regularly **post or create their own online content**, reasons why

\- 0 +
Change, Jan 2018 to June 2022

As a means of **changing the world (net)**

I have opinions that need to be heard

To correct lies and misinformation

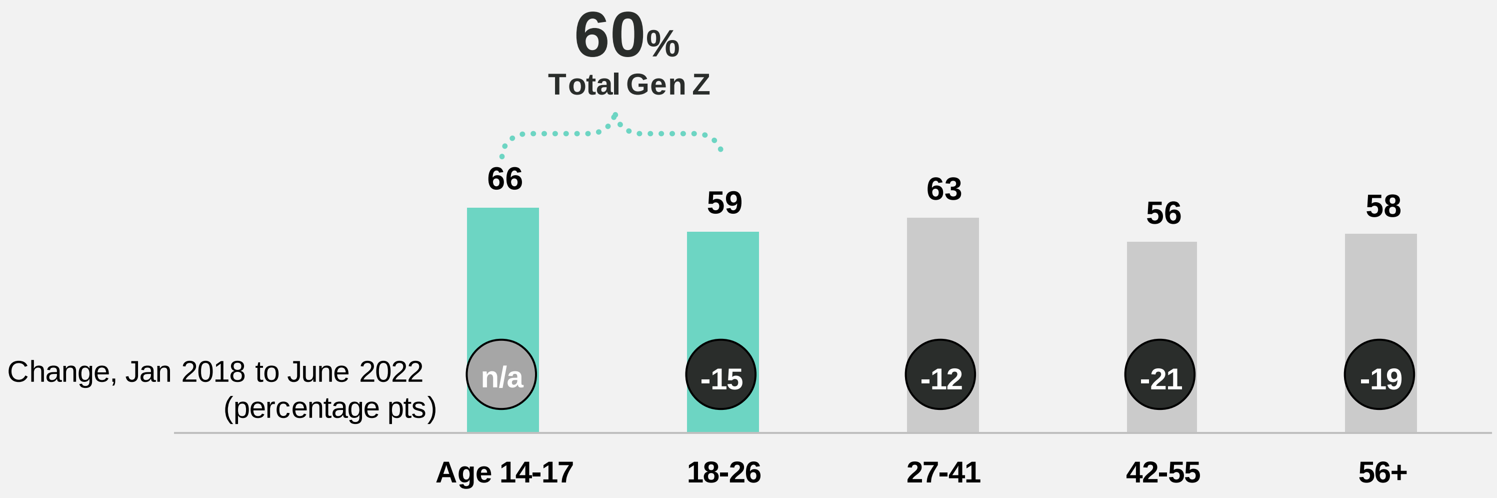
To help create positive changes in the world

Global 13

60%

-16 pts

Change, Jan 2018 to June 2022



A BRAND'S STAND MUST BE VISIBLE AT EVERY POINT OF TRANSACTION

Percent who agree

Change, June 2021 to June 2022

- 0 +

Brands **should make it easier for me to see** what their values and positions on important issues are **when I am about to make a purchase**

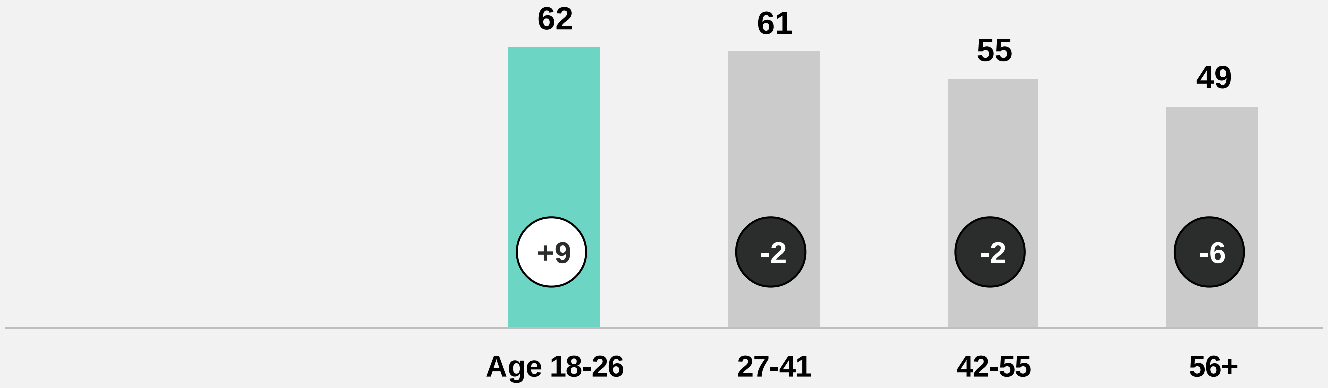
Global 14

57%

-1 pt

Change, June 2021 to June 2022

Large increase among Gen Z



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. Q17. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 14-mkt avg., and by age.

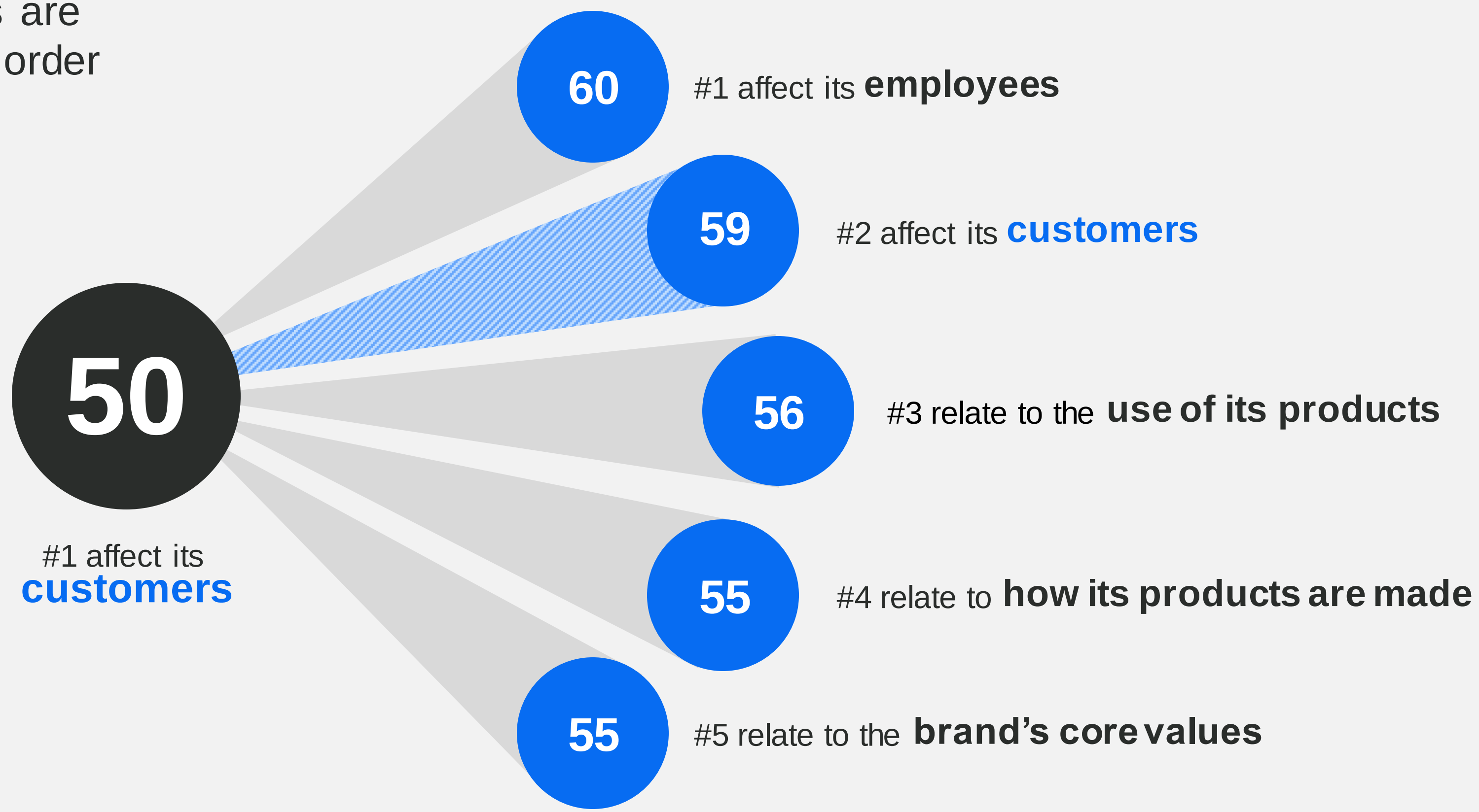
TRUST MEANS BUSINESS TO BRANDS

2017 TO 2022: TODAY, BRANDS MUST TAKE ACTION ON ISSUES ACROSS THE BUSINESS

Issues on **which half or more believe** brands are obligated to take a stand, top 5 shown in rank order

Global 11 June 2017 May 2022

Brands must take a stand on issues that…



2022 Edelman Trust Barometer May Update. EB_Q49. There are many controversial societal or political issues that a brand or company can choose to weigh in on. Some of the issues may be ones that you feel the brand has an obligation to take a stand on and should take a leadership role in addressing. Some may be ones that you feel the brand has permission to address and participate in supporting if it chooses to, and some may be issues you feel that the brand really has no license to address and should avoid becoming involved in. For each of the types of issues described below, please indicate whether you believe that a brand has an obligation to take a stand, permission to take a stand, or it is wrong for it to take a stand on this type of issue. 3-point scale; code 1, obligated to take stand. Question asked of half of the sample. General population, 11-mkt avg.

WHAT A BRAND STANDS FOR MUST BE EVIDENT IN THEIR ACTIONS

Percent who agree

I expect to see the brand's stand in:

What they **do** (avg)

Global 14

63%

how products are made and sold

employee treatment

supply chain

where they do business

What they **say** (avg)

Global 14

62%

advertising

website

2022 Edelman Trust Barometer May Update. EB_Q51. If a brand or company is really serious about taking a stand on a controversial societal or political issue, where and how do you expect to see evidence of that stand? 9-point scale; top 4 box, important. Question asked of half of the sample. General population, 14-mkt avg. "What they do" is an average of attributes 8, 9, 11, and 13; "What they say" is an average of attributes 2 and 3.

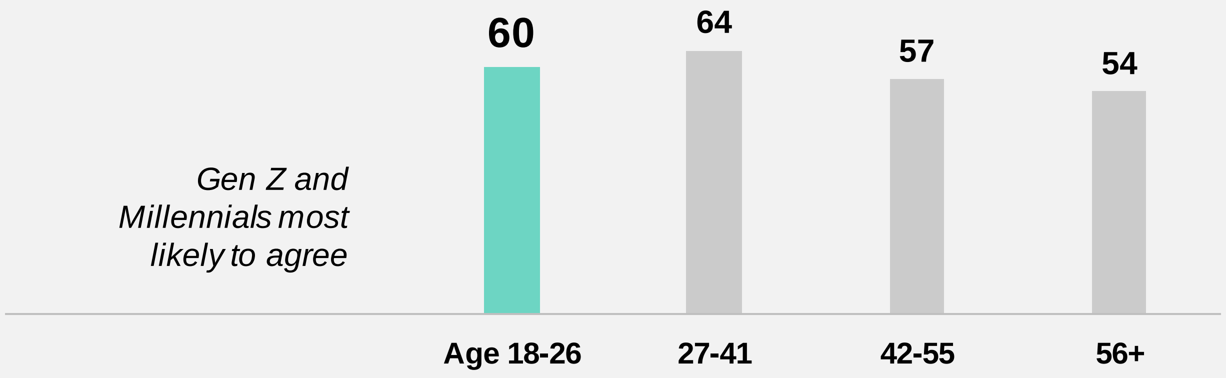
IF THEY DON'T TRUST THE COMPANY BEHIND THE BRAND, THEY WILL STOP BUYING

Percent who agree

A good reputation may get me to try a product; but **unless I come to trust the company behind the product, I will soon stop buying it**

Global 14

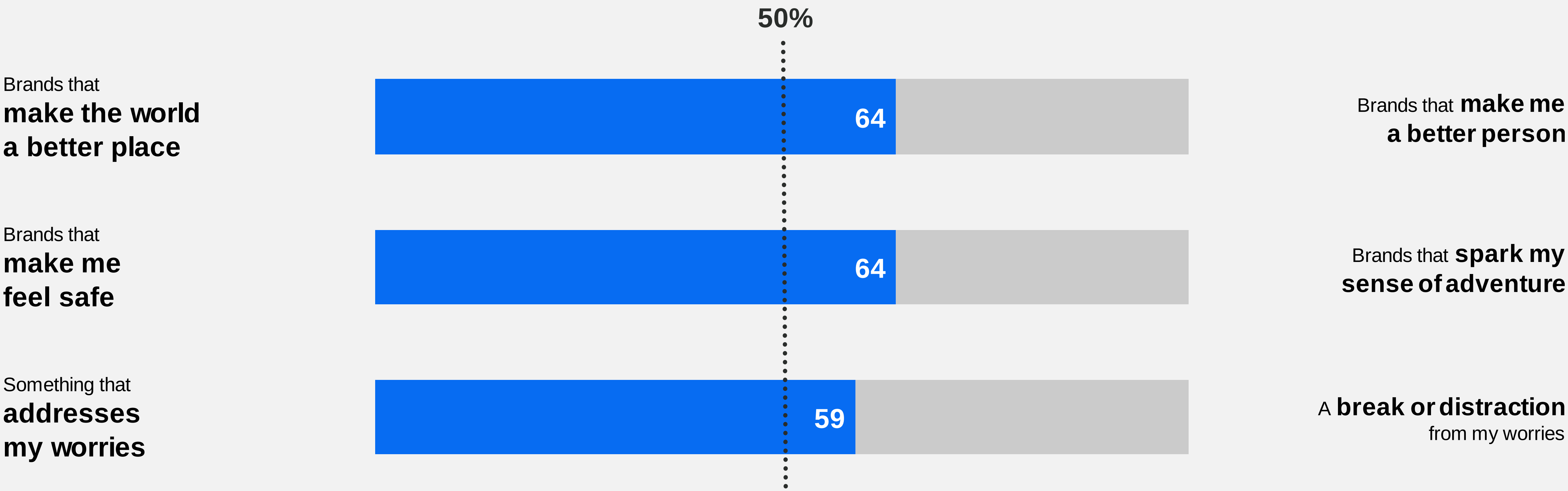
59%



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. BRD_OP. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Attributes shown to half of the sample. General population, 14-mkt avg., and by age.

BRANDS MUST SOLVE REAL-WORLD PROBLEMS AND EASE FEARS

Which are you more attracted to?



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. ATTRACT. You are about to see a series of two choices. Please pick the one that better describes the type of images, messages, people and brands that you are more attracted to, or that you find more appealing, these days. General population, 14-mkt avg.

TRUST AND BRAND ACTION MORE LIKELY TO COMMAND A PREMIUM THAN BRAND IMAGE

Percent who agree

Even if two products are almost identical when it comes to their features, results, and customer service, there are still some brands **worth paying more for because…**

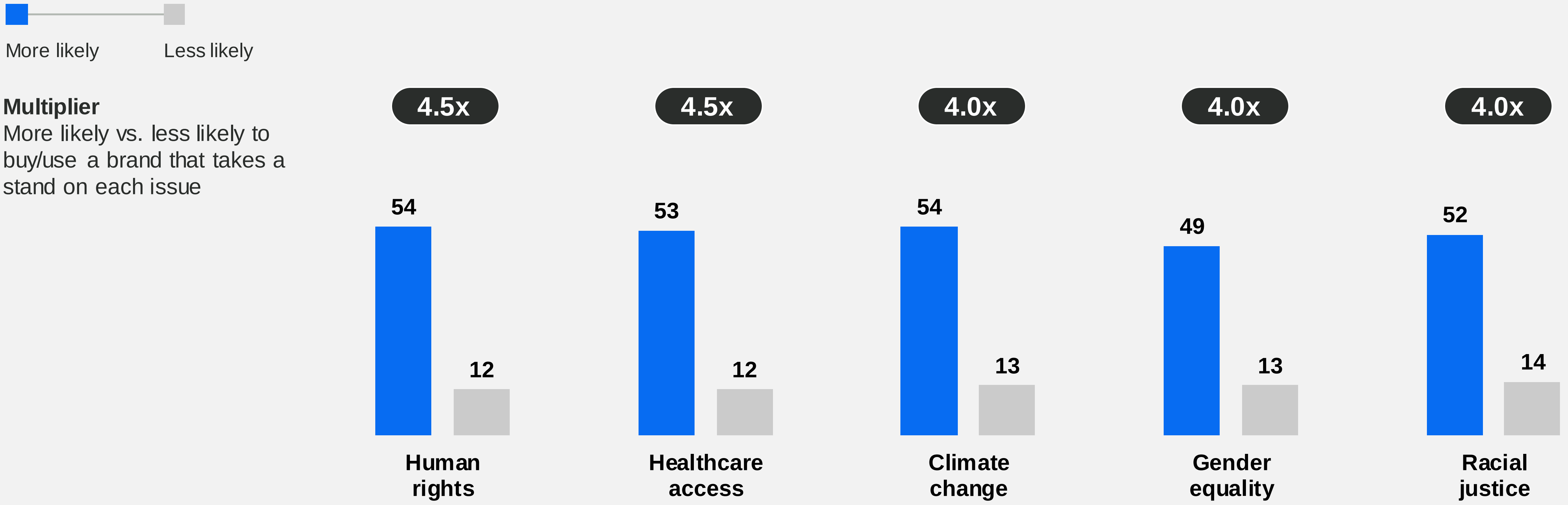
	Global 14	Age 18-26	27-41	42-55	56+
they have **earned my trust**	59	**65**	**65**	58	50
of the **good they do in the world**	55	59	**61**	54	45
of their **cachet or image they convey**	47	54	**56**	47	34

Gen Z and Millennials most likely to reward brands with a trust premium

2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. BRD_OP. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Attributes shown to half of the sample. General population, 14-mkt avg., and by age.

MORE LIKELY TO BUY VS NOT BUY WHEN BRANDS TAKE ACTION

Percent who say they are more or less likely to buy or use a brand if it were to publicly support and demonstrate a commitment to each



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? 4-point scale, codes 1-2, less likely; code 4, more likely. General population, 14-mkt avg.

TRUSTED BRANDS EARN MORE BUYING, LOYALTY AND ADVOCACY

Percent who say they are more likely to do this for **a brand they fully trust,** versus one they don't

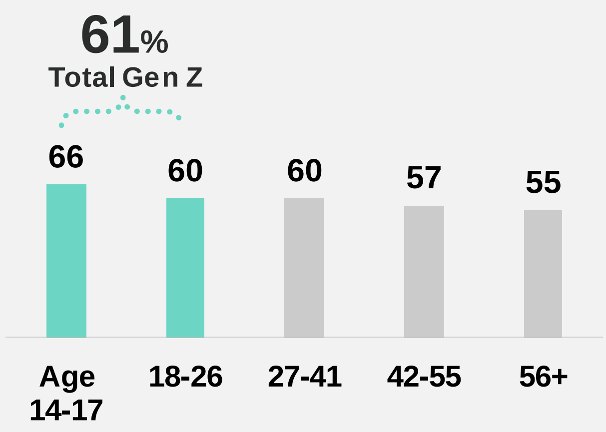
Purchase (net)

Buy new products the brand introduces

Buy the brand even if it is not as cheap

Global 14

58%



Stay loyal and advocate (net)

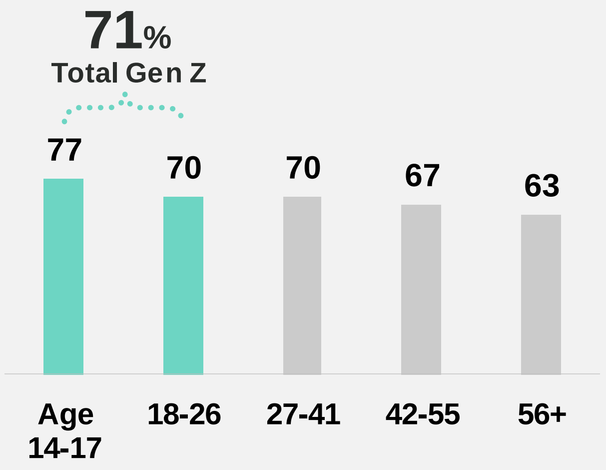
Stay loyal

Stick with it despite a mistake

Recommend it to others

Global 14

67%



2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. TRUST_KPI. What are you more likely to do on behalf of a brand that you fully trust versus one that you DO NOT fully trust? Pick all that apply. General population, 14-mkt avg., and by age; and the youth sample (question shown to half of the sample). "Total Gen Z" is a weighted average of 14-17- and 18–26-year-olds. "Purchase" is a net of attributes 5 and 9; "Stay loyal and advocate" is a net of attributes 1, 2, and 10.

EARNING TRUST THROUGH THE CASCADE OF INFLUENCE

1

Lean Into Gen Z's Gravitational Pull

- Gen Z is the tipping point for action. If you can activate them, you can shape behavior of all.
- Don't make the mistake of thinking Gen Z isn't your target. Plan and design for Gen Z to unlock action and activism at scale among older generations.

2

Build Inside-Out Activism

- Brands are shaped as much by employee culture as consumer demand.
- Don't just take care of your employees, give them something to rally around. Activate them as advocates of your mission and business.

3

CMOs are Trust Catalysts

- Marketing isn't vertical, it's horizontal.
- CMO's must collaborate with the C-suite to influence a broader set of issues beyond advertising alone.

4

Action Earns Trust

- The marketing funnel has been upended. Brands that don't act don't even make the consideration set.
- Brands can't just talk anymore. They must act to earn trust and influence.

TECHNICAL APPENDIX

This report was published by the Edelman Trust institute, Edelman’s global research center and learning laboratory for trust. The Edelman Trust Institute publishes data-driven insights on trust that inform leadership, strategy, policy and sustained action across institutions.

To contact us, please email trustinstitute@edelman.com.

SAMPLE SIZE, QUOTAS AND MARGIN OF ERROR

	General population[2] (adults age 18+)			Youth sample[3] (age 14-17)		
	Sample size[1]	Margin of error +/-		Sample size[1]	Margin of error +/-	
		Total sample	Half sample		Total sample	Half sample
Global	13,713	0.8%	1.2%	6,778	1.2%	1.7%
Brazil	1,005	3.1%	4.4%	500	4.4%	6.2%
Canada	1,000	3.1%	4.4%	500	4.4%	6.2%
China[4]	1,000	3.1%	4.4%	500	4.4%	6.2%
France	1,000	3.1%	4.4%	500	4.4%	6.2%
Germany	1,000	3.1%	4.4%	500	4.4%	6.2%
India	931	3.2%	4.5%	500	4.4%	6.2%
Japan	1,000	3.1%	4.4%	500	4.4%	6.2%
Mexico	1,000	3.1%	4.4%	500	4.4%	6.2%
Saudi Arabia	895	3.3%	4.6%	500	4.4%	6.2%
S. Africa	1,000	3.1%	4.4%	500	4.4%	6.2%
S. Korea	1,001	3.1%	4.4%	495	4.4%	6.2%
UAE	888	3.3%	4.7%	283	5.8%	8.3%
UK	1,000	3.1%	4.4%	500	4.4%	6.2%
U.S.	993	3.1%	4.4%	500	4.4%	6.2%

NOTE: Some of the content we ask is deemed politically sensitive and we take special precautions in order to avoid putting our respondents, or ourselves, in a position to break any local laws. We worked closely with our sample partner and its legal team to identify which questions we should refrain from asking and removed questions and/or answer options China.

1. Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.
2. For the general population, there were quotas in every country on age, gender, and region. There were additional quotas on ethnicity in the UK and U.S., and on nationality in the UAE and Saudi Arabia.
3. For the youth sample, there were quotas in every country on gender, and region. There were additional quotas on ethnicity in the UK and U.S., and on nationality in Saudi Arabia.
4. All data collected in China is from the mainland. Regions of Greater China were not surveyed.

COUNTRIES INCLUDED IN EACH GLOBAL AVERAGE

To ensure a comparative sample in historical tracking, we use the maximum number of markets that are common year to year.

	Global 14	Global 13 (T)	Global 13 (S)	Global 11	Global 6
Brazil	√	√	√	√	
Canada	√	√	√	√	
China	√	√		√	√
France	√	√	√	√	√
Germany	√	√	√	√	√
India	√	√	√	√	
Japan	√	√	√	√	
Mexico	√	√	√	√	√
Saudi Arabia	√		√		
S. Africa	√	√	√		
S. Korea	√	√	√		
UAE	√	√	√	√	
UK	√	√	√	√	√
U.S.	√	√	√	√	√

YOUNG GEN Z AGE 14-17 SAMPLE

For this study, an additional sample of 500 respondents age 14-17 was collected in each market. Two markets did not meet the target of 500 respondents: S. Korea (n=495) and UAE (n=283).

The next step was to weight these respondents in each market down to match the natural proportion of 14-17-year-olds within the total 14-26 Gen Z age cohort. In each market, the proportion of the 14-17 to 18-26 cohorts was determined by an analysis of census data in each country, and the data was weighted to reflect those proportions. This process ensured a comparative sample across age segments.

Most of the questions asked of respondents in the 14-17 age range were shown to only half the sample. Instead of making the entire sample proportional to the 18-26 segment, we weighted each block. The half sample served as the de-facto base size for a majority of the questions asked, with the final weighted sample sizes shown in the table at right.

	Total Sample Size	Block A Sample Size	Block B Sample Size
Brazil	268	134	134
Canada	192	96	96
China	226	113	113
France	234	117	117
Germany	196	98	98
India	328	164	164
Japan	202	101	101
Mexico	304	152	152
Saudi Arabia	204	102	102
S. Africa	340	170	170
S. Korea	182	91	91
UAE	116	58	58
UK	222	111	111
U.S.	240	120	120

ANNOTATION FOR HISTORICAL DATA POINTS SHOWN ON PG. 4

64% choose, switch, avoid or boycott a brand based on its stand on controversial societal issues

2018 Edelman Earned Brand. Belief-driven buying segments. 8-market average. See 2018 Technical Appendix for a full explanation of how belief-driven buying was measured.

45% have convinced other people to stop using a brand or have recently started using a new brand they felt was not acting appropriately in response to the pandemic or because of the innovative or compassionate way they have responded to the virus outbreak

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020. Data is a net of attributes 8-9.

60% agree how a brand responds over the next several weeks to the protests against racial injustice will influence whether I buy or boycott them in the future

2020 Edelman Trust Barometer Special Report: Brands and Racial Justice in America. Q5. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. General population, U.S., by age, gender and political affiliation, and among Non-Hispanic White, Black, Latinx and Asian American populations. Data shown is a net of attributes 1 and 2.

75% say it is critical or important a brand treats its employees well when deciding on if they will use a brand

2021 Edelman Trust Barometer Special Report: Trust, The New Brand Equity. TRUST_IMP. When it comes to brands in general that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. 3-point scale; code 1, deal breaker; code 2, important. General population, 14-mkt avg. Data on the left is a sum of codes 1 and 2.

64% boycott brands based on their beliefs about climate change.

2021 Edelman Trust Barometer Special Report: Climate Change. CLI_AGR_BUY. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. General population, 14-mkt avg. Data on the left is a net of attributes 2, 3, and 7.

47% say they have altered my behavior toward a brand or company based on how it has responded to Russia's invasion of Ukraine.

2022 Edelman Trust Barometer Special Report: The Geopolitical Business. BEH_CNG. Which of the following have you done in response to how a brand or company has responded to Russia's invasion of Ukraine? Pick all that apply. General population, 13-mkt avg., and by demographics. Data not collected in China. Data is a net of attributes 1-3.

60% say their likelihood of buying a brand would be impacted if it were to publicly support and demonstrate a commitment to reducing economic inequality.

2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. RISK. If a brand were to publicly support and demonstrate a commitment to each of the following, how would that impact your likelihood of buying or using that brand? Codes 1-2, 4; less or more likely. General population, 14-mkt avg.

HOW WE ANALYZED SOCIETAL AND PERSONAL WORRIES

Respondents were asked a series of questions to understand their level of concern across issues. A respondent was classified as “worried” if they answered a six or higher on a nine-point scale. A metric was created to give each respondent a count of the issues they worry about.

- Respondents who were worried about eight or more of the twelve items on the right were classified as high-worry individuals
- A mean was also calculated to determine the average number of issues each generation segment worries about

Respondents were asked:

How much do you worry about each of the following?

1. My personal safety and security
2. Having people I can rely on when I need help
3. My mental health
4. Being able to find trustworthy information about important issues
5. Being able to find sources of joy in my life
6. My physical health
7. Not having enough money to live a comfortable life
8. Being trolled or bullied online
9. Being left behind or left out as things rapidly change around me
10. Having my personal/financial information stolen
11. Not having control over the important things in my life
12. Not being respected by others. People treating me like I do not matter.

HOW WE SEGMENTED RESPONDENTS INTO ADVOCATES AND ACTIVISTS IN THE FIGHT FOR RACIAL JUSTICE

For this analysis, we took the possible responses from a question which asked respondents: "**There are many things that a person might do to help address the racism problem in this country. Which of the following, if any, have you done in response to racism in this country?**"

The possible answer choices are shown on the right, along with how those answers were categorized. The answer choices shown underneath **denier** and **on the sideline** are exclusive, meaning that if a respondent chooses one of these responses, they can't choose anything else.

Respondents qualify as an **advocate against racism** if they answer yes to any of the four advocacy choices, but none of the activist items. If a respondent answers yes to any of the **activist** items, they qualify as an activist against racism, whether or not they also qualify as an advocate.

Possible categories respondents could fall into:

1. **Denier:**
   - I do not believe racism is a problem in this country, so I have not personally done anything to address or fight it
   - I do not believe that racism is a problem in this country, and I have engaged in counter protests against people or organizations that have attempted to characterize the U.S. as a racist country.

2. **On the sideline**
   - I believe racism is a problem, but I have not personally done anything to address or fight it.

3. **Advocate actions:**
   - I have supported and participated in product and business boycotts in response to a company's racist behavior or racist policies quartile
   - I have signed petitions to support specific actions and initiatives aimed at addressing racism
   - I have "liked" or reposted content on social media that calls attention to or discusses the problem of racism
   - I have donated money to groups that are committed to ending racism

4. **Activist actions:**
   - I have attended public protests or marches to oppose racist behavior, incidents, or policies
   - I have communicated directly to political or business leaders about what I want or expect them to do to address racism
   - I have campaigned for political candidates that share my views regarding the importance of ending racism
   - I have volunteered with organizations that are committed to fighting racism

HOW WE CALCULATED BELIEF-DRIVEN BUYERS

Respondents were asked a series of questions to understand the role their values, opinions about social issues, and political beliefs played in their purchasing decisions. The Belief-Driven Buyer scale was created by averaging respondents' answers to the seven 9-pt agree/disagree scale items, shown in the table to the right.

- Non-belief-driven buyers were those that scored between 1 – 4.99 on the scale, meaning on average they disagreed with these statements
- Respondents who scored between 5.00 – 9.00 on the scale were classified as belief-driven buyers, meaning on average they saw themselves reflected at least to some extent in these statements

Respondents were asked:

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

1. Even if a company makes the product that I like most, I will not buy it if I disagree with the company's stand on important social issues.
2. If a brand offers the best price on a product, I will buy it even if I disagree with the company's stand on controversial social or political issues.
3. I have bought a brand for the first time for the sole reason that I appreciated its position on a controversial societal or political issue.
4. I have stopped buying one brand and started buying another because I liked the politics of one more than the other.
5. I have strong opinions about many societal and political issues. The brands I choose to buy and not buy are one important way I express those opinions.
6. I have stopped buying a brand solely because it remained silent on a controversial societal or political issue that I believed it had an obligation to publicly address.

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

PERS_EMO: How much do you worry about each of the following?

Full List of Issues
My personal safety and security
Having people I can rely on when I need help
My mental health
Being able to find trustworthy information about important issues
Being able to find sources of joy in my life
My physical health

Full List of Issues
Not having enough money to live a comfortable life
Being trolled or bullied online
Being left behind or left out as things rapidly change around me
Having my personal/financial information stolen
Not having control over the important things in my life
Not being respected by others. People treating me like I do not matter

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

KID_INFLU: To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people?

Shortened	Full List of Issues
Get our news	How you get your news and stay informed about current events
Watch movies and TV	How you access movies and TV shows
How green or diverse my brands need to be	The level of environmental friendliness you demand from the products you use What you expect from brands when it comes to their engagement in solving social problems or addressing societal issues
If my brands need to take stands	The amount of ethnic and lifestyle diversity you expect to see in a brand's advertising
How I shop	Where and how you shop
Products I use	Which technology products you buy or use; The flavors you pick when it comes to snack foods and beverages
How I talk with and about brands	How you communicate your dissatisfaction to a brand; Where and how you talk about brands with other people; How you interact with brands on social media

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

KID_INFLU: To what degree, if any, would you say that the following things about you and your behavior today have been influenced by teenagers and college-aged people?

Shortened	Full List of Issues
How I support the causes I care about	How you support the social and charitable causes you care about
What I expect from my employer	How you act as an employee (e.g., what you expect from your employer, how you work, or your willingness to pressure your employer to change things the organization is doing that you do not approve of)
How I work	How you act as an employee (e.g., what you expect from your employer, how you work, or your willingness to pressure your employer to change things the organization is doing that you do not approve of)
My willingness to pressure my employer to change things I do not approve of	How you act as an employee (e.g., what you expect from your employer, how you work, or your willingness to pressure your employer to change things the organization is doing that you do not approve of)
How I save and invest my money	How you save or invest your money

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

LEAD_PART: For each of the following, what level of involvement would you like to have in helping to address this issue versus what you would like brands to be doing?

Shortened	**Full List of Issues**
Climate change	Climate change
Racism	Racism
Poverty	Eliminating poverty
Gender inequality	Gender inequality
Information quality	Improving the quality and trustworthiness of information available to people on important issues

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

ABILITY_SPK_A: If a brand were to use each of the following as their spokesperson/brand ambassador, how credible or believable would you consider them to be?

Shortened	**Full List of Issues**
A scientist/expert	A scientist or academic expert
A person like me who uses the brand	A person like yourself who regularly uses the brand
A brand technical expert	A technical expert who works for the brand

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

INFLU_TRU: Why do you pay attention to and trust what the influencers that you follow have to say?

Shortened	Full List of Issues
They teach me new skills	They teach me valuable new skills and life strategies
Recommendations based on experience	Their opinions and recommendations are based on actual experience or data
Share my values	I see them as having the same values and priorities in life as I do

DATA IN DETAIL

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

EB_Q51: For each of the following, what level of involvement would you like to have in helping to address this issue versus what you would like brands to be doing?

Shortened	Full List of Issues
How products are made and sold	The values that drive their position on the issue are reflected in how their products are made and brought to market
Employees treatment	The values that drive their position on the issue are reflected in who they hire and how they treat their employees
Supply chain	The values that drive their position on the issues are reflected in where and how they acquire the parts and raw materials for their products
Where they do business	The values that drive their position on the issue are reflected in which states, provinces, regions, or countries they do and do not choose to do business in
Advertising	Their advertising clearly communicates where they stand on the issue
Website	Their support for the issue is prominently displayed on their website

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

ATTRACT: You are about to see a series of two choices. Please pick the one that better describes the type of images, messages, people and brands that you are more attracted to, or that you find more appealing, these days.

Shortened	Full List of Issues
Brands that the world a better place	Brands that focus on making the world a better place
Brands that me a better person	Brands that focus on making me a better person
Brands that make me feel safe	Brands that increase my sense of safety and security
Brands that spark my sense of adventure	Brands that spark my sense of adventure and thrill-seeking, and show the energizing effect of risk-taking
Something that address my worries	Something that directly addresses my worries and troubles
A break or distraction from my worries	Escapism, a break or distraction from my worries and troubles

FULL TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

TRUST_KPI: What are you more likely to do on behalf of a brand that you fully trust versus one that you DO NOT fully trust?

Shortened	Full List of Issues
Buy new products the brand introduces	Buy new products or services the fully trusted brand introduces
Buy the brand even if it is not as cheap	Buy the fully trusted brand even if it is not as cheap as some of my other options
Stay loyal	Stay loyal to the fully trusted brand, and not be actively shopping around for another brand that I might like better
Stick with it despite a mistake	Stick with the fully trusted brand even if it makes a mistake or something goes wrong
Recommend it to others	Recommend the fully trusted brand to other people