

Spring Update:
Trust and the
Covid-19 Pandemic

Edelman Trust Barometer 2020



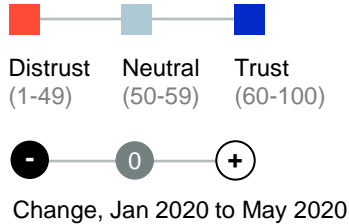
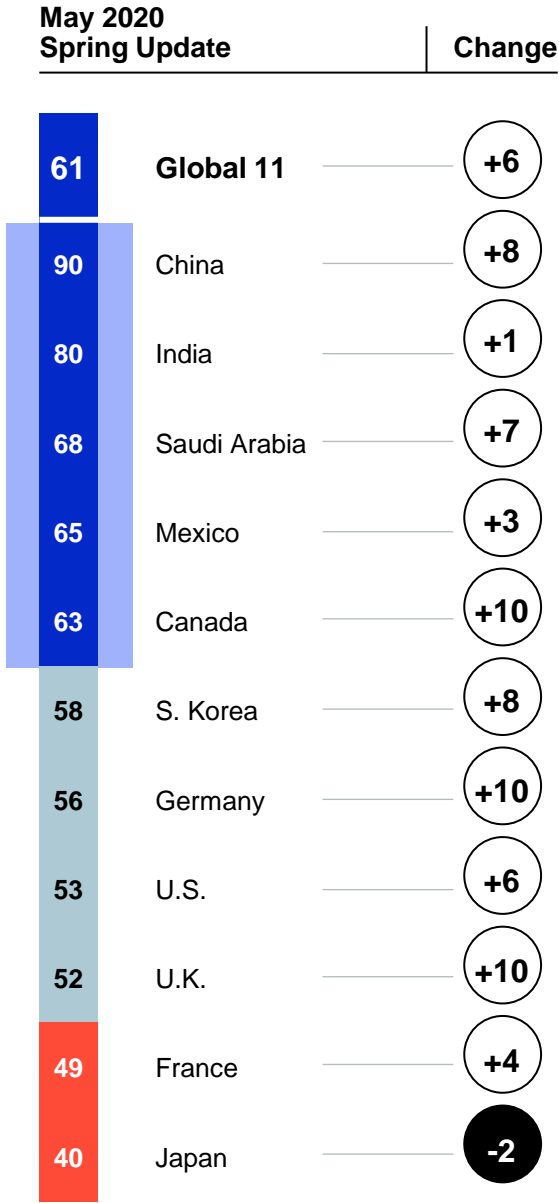
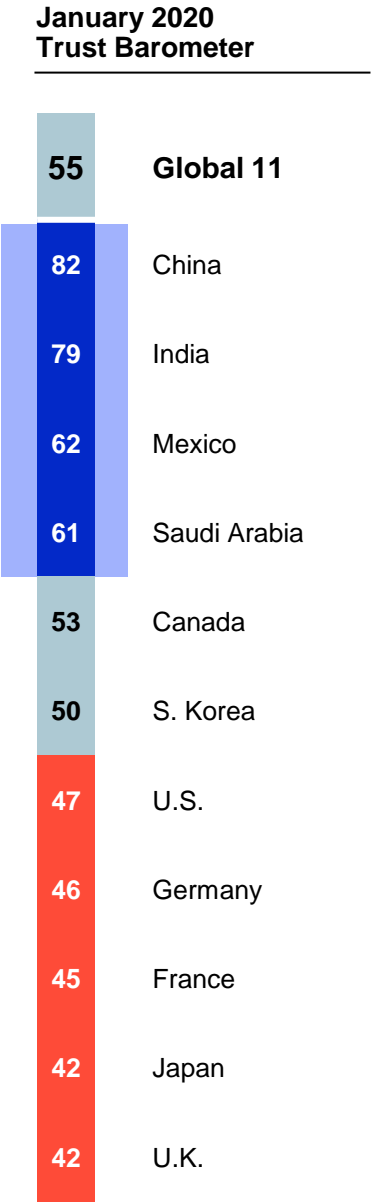
A RECORD RISE IN TRUST; TRUST INDEX AT ALL-TIME HIGH

Trust Index

11-market global average increases 6 pts.,
with increases in 10 of 11 markets

Distrusting markets decline from 5 to 2

2020 Edelman Trust Barometer Spring Update. 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, 11-mkt avg.



**Change in the Trust Index,
Jan 2012 – May 2020
(10-market avg.)**

	Trust Index	Change
2012	45	n/a
2013	50	+5
2014	48	-2
2015	47	-1
2016	51	+4
2017	49	-2
2018	49	0
2019	53	+4
Jan 2020	55	+2
May 2020	61	+6

SUSTAINABLE RISE OR TRUST BUBBLE?

LARGE TRUST GAINS OFTEN QUICKLY LOST

Trust loss one year after double-digit gain

No trust loss one year after large gain

Double-digit gains in trust, and change one year later

280 measured changes in trust,
across 7 years of data for 4 institutions
and 10 markets measured

17 double-digit trust gains
from 2012 to 2020
(6% incidence rate)

13 of 17 followed by a trust loss
one year later (76%)

Year	Market	Institution	Trust Gain	Change, 1 Year Later
2016	China	Business	12	-3
2016	China	NGOs	17	-10
2013	France	Business	10	-11
2016	France	Business	16	4
2013	Germany	Government	11	1
2013	Germany	Media	12	0
2013	India	Government	12	-4
2013	India	Media	10	-6
2015	India	Government	17	-3
2017	India	Government	10	-5
2014	Japan	Government	12	-3
2016	Mexico	Business	12	-9
2016	Mexico	Media	10	-11
2016	Mexico	NGOs	11	-3
2018	S. Korea	Government	17	3
2013	U.K.	Business	11	-4
2013	U.K.	NGOs	10	-1

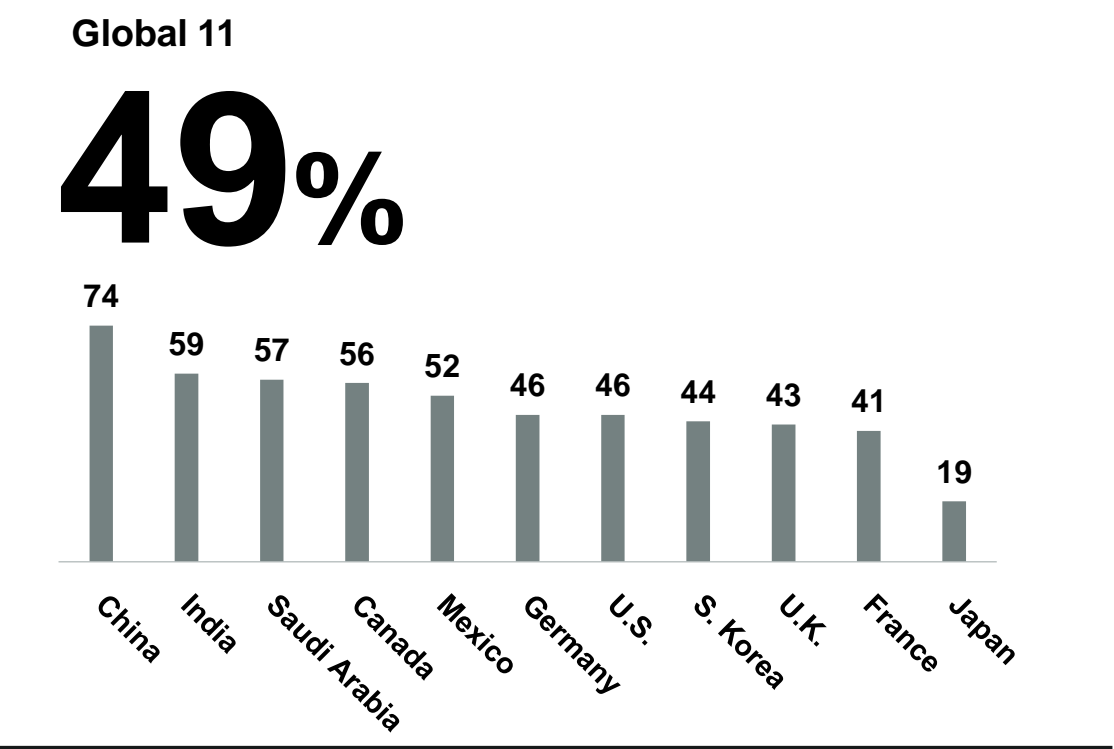
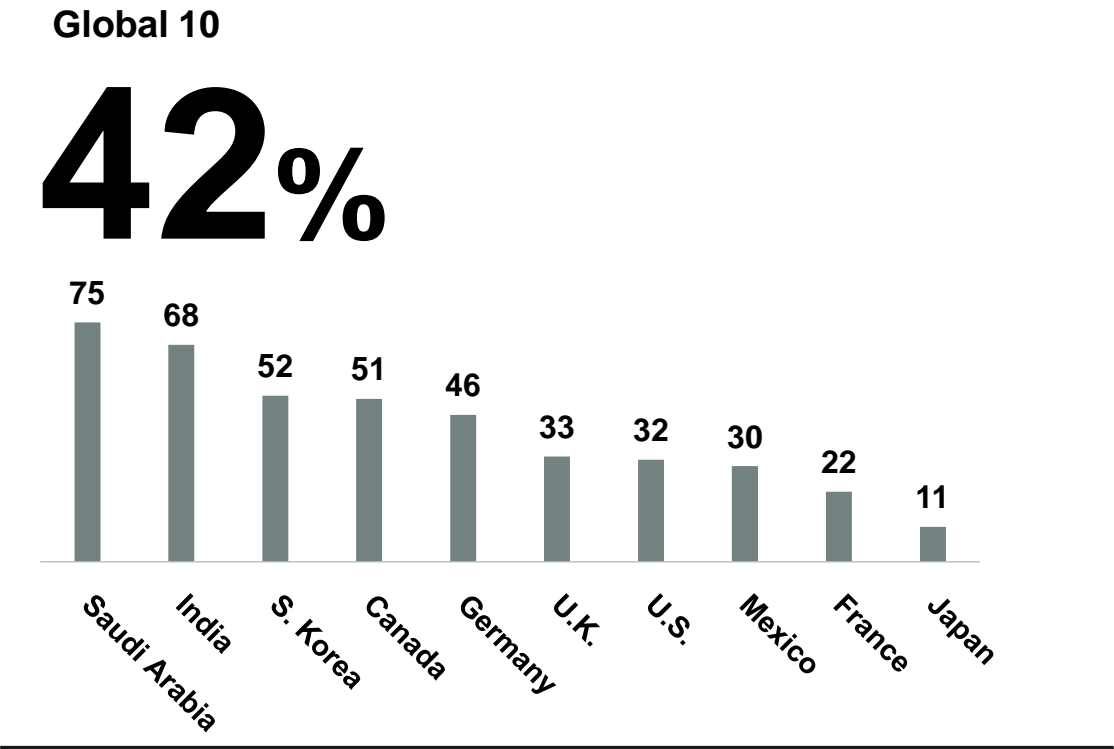
2020 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 10-mkt avg. Data shown is an analysis of 280 measured changes in trust across 4 institutions and 10 markets, based on general population data collected between 2012 and 2020.

NEITHER GOVERNMENT NOR BUSINESS KEEPING ME SAFE

Percent who rate national government and business as doing well or very well

Government Performance
Ensuring **medical supplies and good treatment are available** even in the poorest areas

Business Performance
Implementing safety measures to **protect workers and customers**



FEAR OF JOB LOSS WORSENS

Percent of employees and job seekers who agree

January 2020 Edelman Trust Barometer

I worry about **losing my job** due to automation, globalization, workforce restructuring or an economic downturn

⊥
80%

May 2020 Spring Update

I am very concerned about **job loss due to the pandemic** and not being able to find a new job for a very long time

⊥
56%

2020 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worried. Job loss net = codes 1,2,3,4,5,23,24. General population, 11-mkt avg, among those who are employed (Q43/1).

2020 Edelman Trust Barometer Spring Update. CV1_POP. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. General population, 11-mkt avg, among those who are employed, furloughed/laid off due to the pandemic or unemployed for other reasons (Q206/1,2,8,9,10).

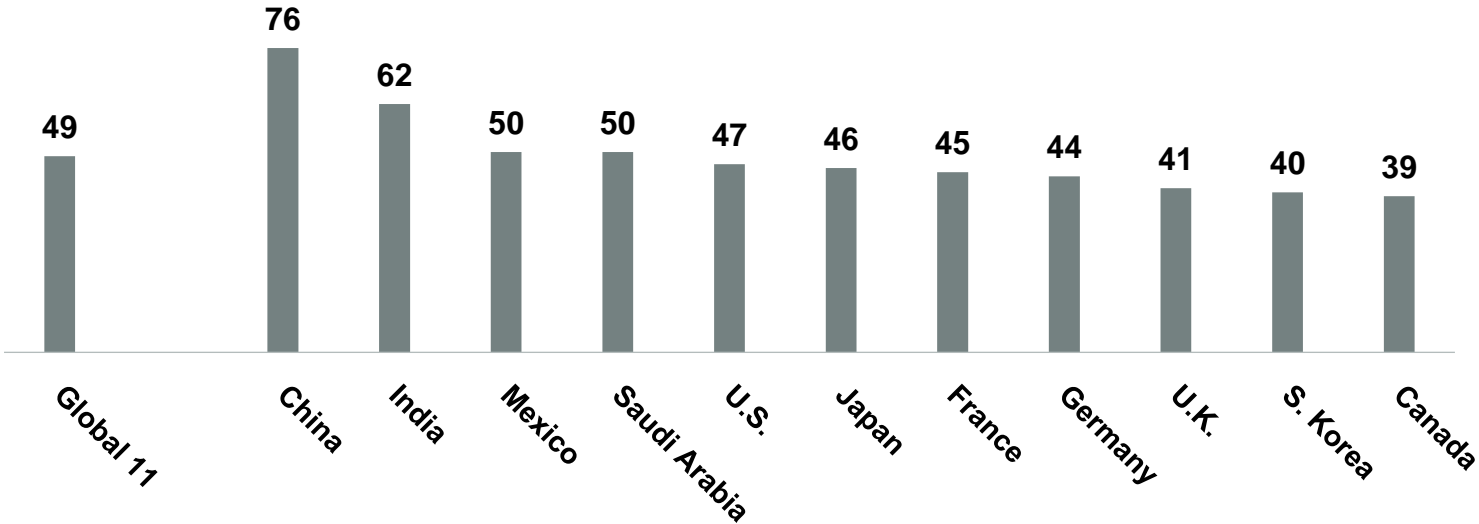
FAKE NEWS CONCERNS ADD TO INSTABILITY

Percent who agree

I worry that there is a lot of **fake news and false information** being spread about the virus

⊥
67%

It has **been difficult for me to find reliable and trustworthy information** about the virus and its effects



PANDEMIC SPOTLIGHTS SOCIETAL INEQUITIES

Percent who agree

This pandemic has made me realize how big the gap in this country is between the rich and the working class, and that **something must be done to more fairly distribute our country's wealth and prosperity**

⊥

64%

Those with less education, less money and fewer resources are being unfairly burdened with most of the suffering, risk of illness, and need to sacrifice due to the pandemic

⊥

67%

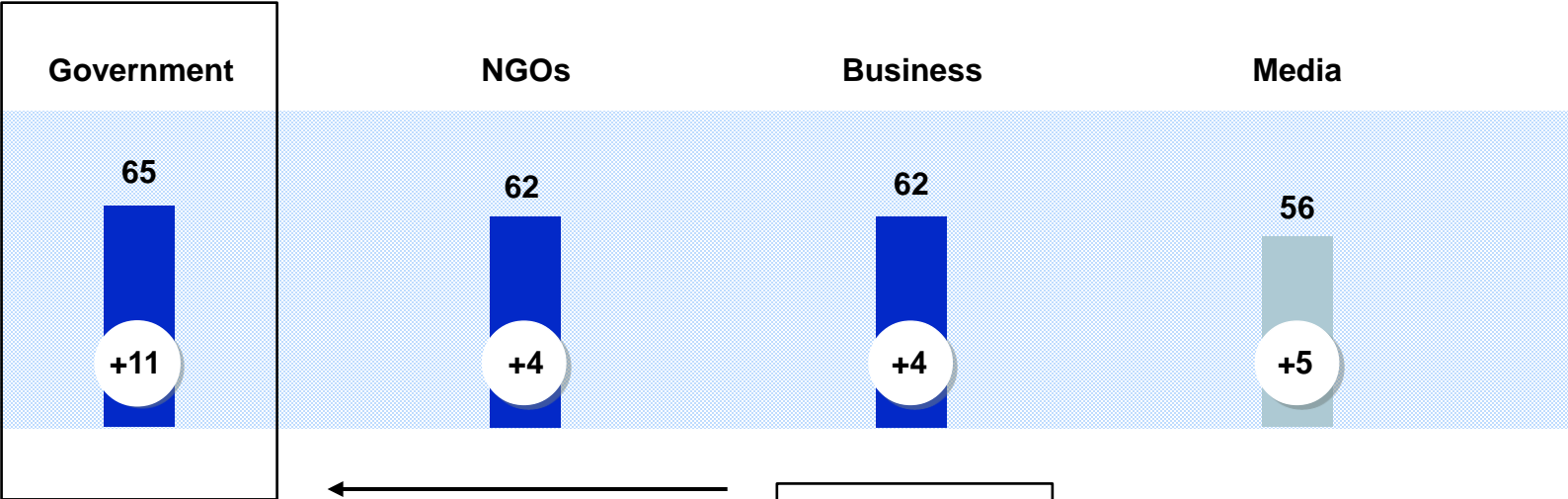
2020 Edelman Trust Barometer Spring Update. PER_BLF. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. CV1_POP. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. General population, 11-mkt avg.

A RE-ORDERING OF TRUST: GOVERNMENT NOW MOST TRUSTED

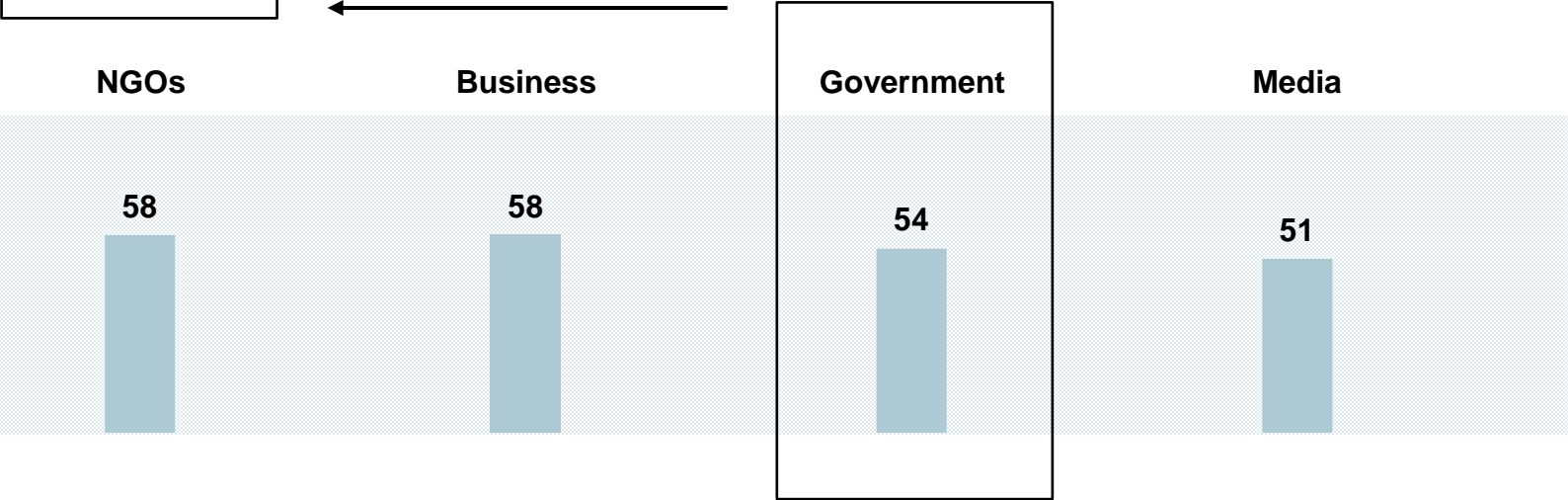
Percent trust



**May 2020
Spring Update**
Only media not trusted
Government most trusted

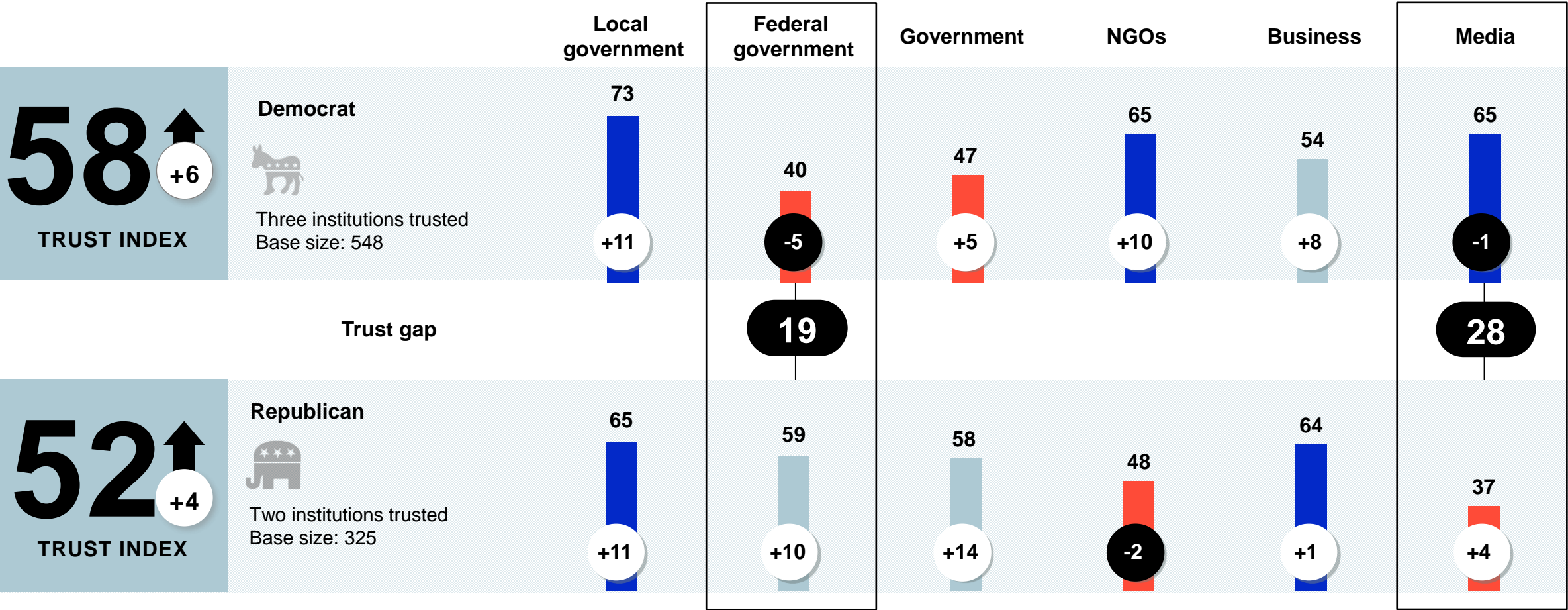


**January 2020
Trust Barometer**
No institutions trusted
NGOs and business most trusted



U.S. POLITICAL DIVIDE

Percent trust, among those who intend to vote Republican or Democratic in Nov. 2020



2020 Edelman Trust Barometer Spring Update. 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. Q44. Which political party do you intend to vote for in this year's Presidential election? General population, U.S. by the Republican or Democratic party the respondent intends to vote for in the 2020 U.S. Presidential Election (Q44/1-2).

STRONGEST MANDATE FOR GOVERNMENT TO LEAD IN ALL AREAS OF PANDEMIC RESPONSE

Percent who expect each institution to take a leading role to address each challenge

Highest expectation in all areas

Government	
Contain the pandemic	73
Inform the public	72
Provide economic relief and support	86
Help people cope	72
Get the country back to normal	79

Other institutions expected to contribute in their areas of expertise

Media	
Contain the pandemic	21
Inform the public	58
Provide economic relief and support	23
Help people cope	30
Get the country back to normal	25

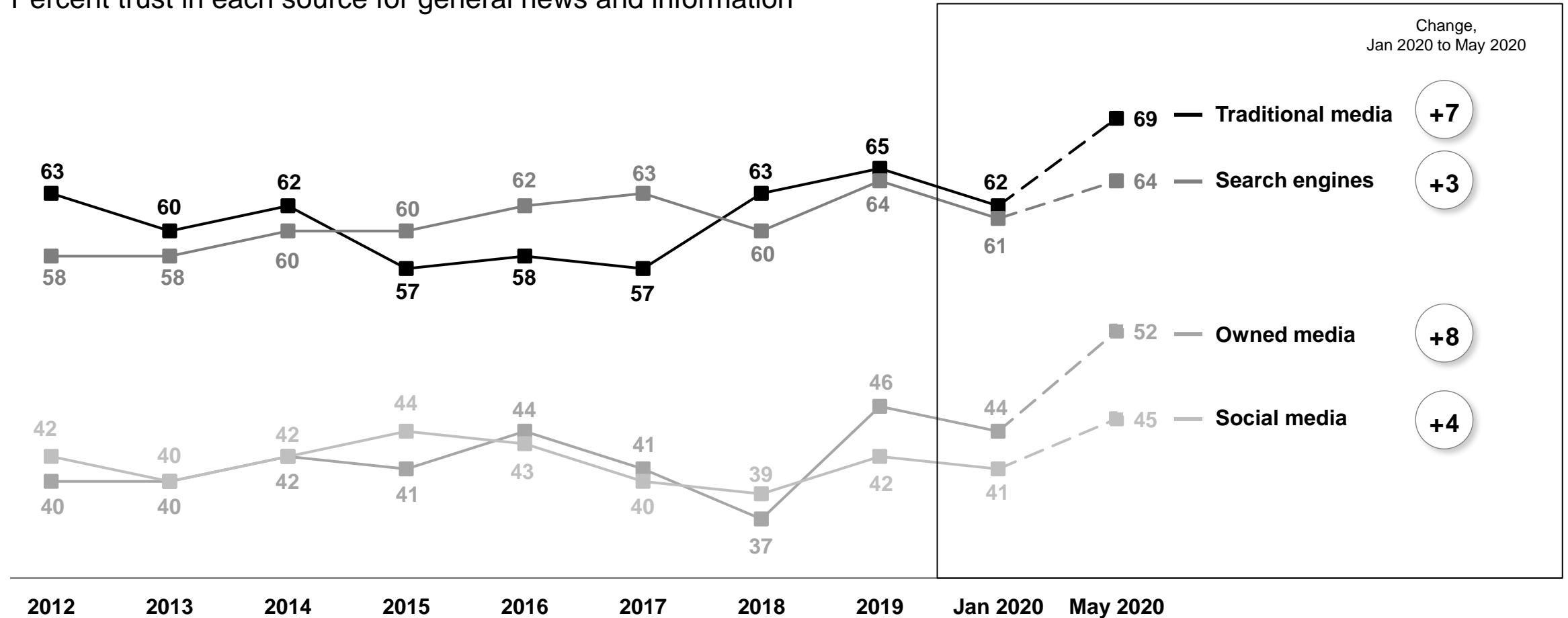
Business	
Contain the pandemic	39
Inform the public	25
Provide economic relief and support	56
Help people cope	50
Get the country back to normal	36

NGOs	
Contain the pandemic	30
Inform the public	30
Provide economic relief and support	33
Help people cope	47
Get the country back to normal	25

2020 Edelman Trust Barometer Spring Update. WHOSE_JOB. For each of the pandemic-related challenges, please indicate which of these five institutions, if any, you expect to see taking a leading role in addressing it. Pick all that apply. General population, 11-mkt avg. "Contain the pandemic" is a net of r1 and r2, "Help people cope" is a net of r3 and r4, "Inform the public" is a net of r5 and r6, "Provide economic relief and support" is a net of r7-r9, "Get the country back to normal" is a net of r10 and r11.

TRUST IN NEWS SOURCES AT ALL-TIME HIGH, GREATEST TRUST GAINS FOR TRADITIONAL AND OWNED

Percent trust in each source for general news and information

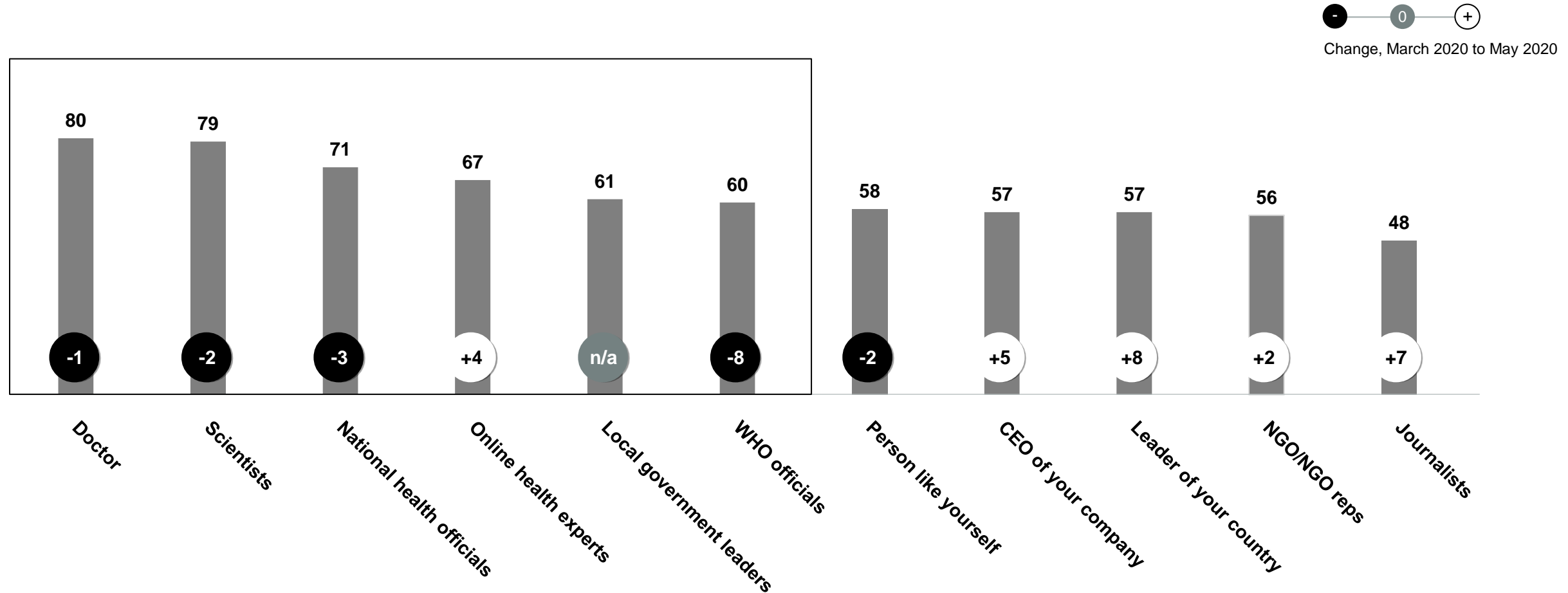


2020 Edelman Trust Barometer Spring Update. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. General population, 10-mkt avg.

*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."

A CALL FOR EXPERT VOICES

Percent who trust each to tell the truth about the pandemic

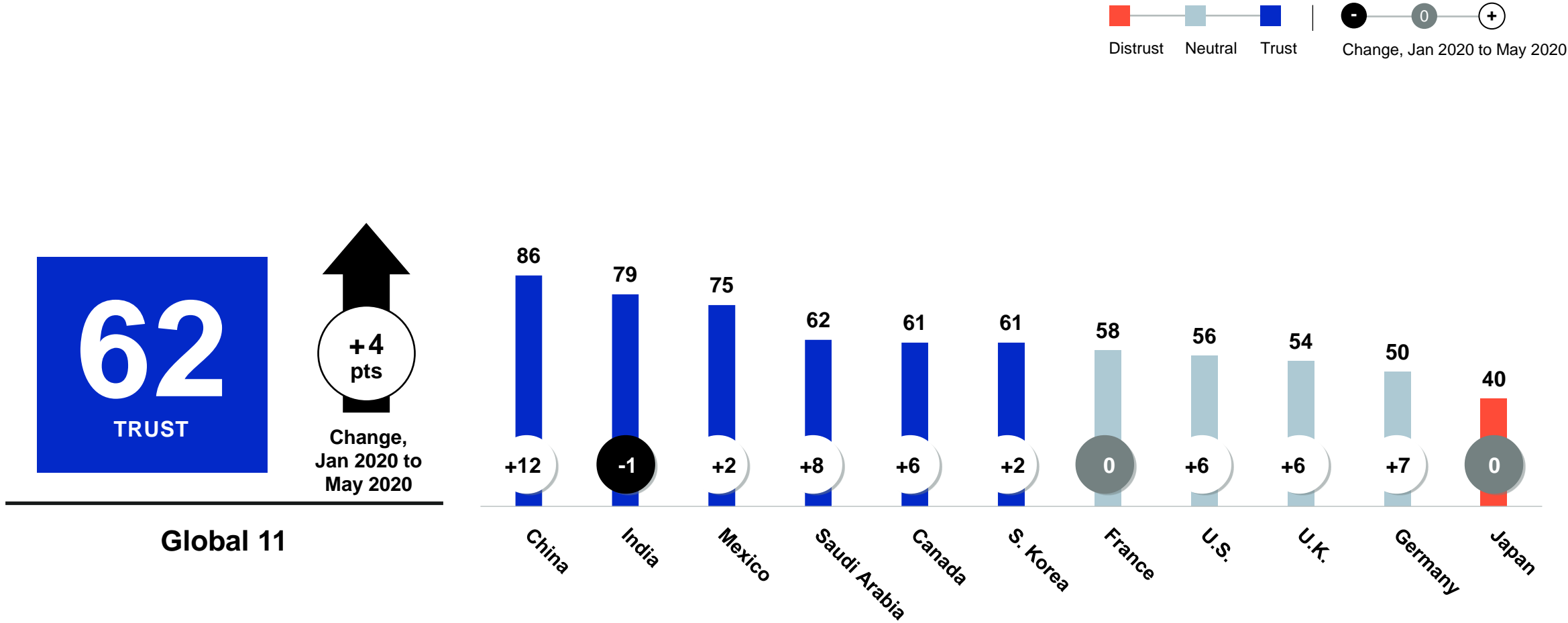


2020 Edelman Trust Barometer Special Report: Trust and the Coronavirus. Q13. Please indicate how much you trust each of the following sources to tell you the truth about the virus and its progression. 9-point scale; top 4 box; trust. Question shown to those who have heard of the virus (Q1/1). 7-mkt avg. "My employer CEO," "HR executive," "Sr. executives," and "Co-workers" were only asked of those employed (Q43/1). Data collected between March 6 and March 10, 2020.

2020 Edelman Trust Barometer Spring Update. CV1_Q13. Please indicate how much you trust each of the following sources to tell you the truth about the virus and its progression. 9-point scale; top 4 box; trust. General population, 7-mkt avg.

TRUST IN NGOs INCREASES IN 8 OF 11 MARKETS

Percent trust in NGOs



2020 Edelman Trust Barometer Spring Update. TRU_INS. [NGOs in general] 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, 11-mkt avg.

URGENT CALL FOR NGOS TO GET THINGS DONE

Percent who say NGOs are performing well or very well on each

**Taking care of people
who are suffering** pandemic-
related financial hardships

⊥

38%

doing this well or very well

Raising money for pandemic
relief efforts

⊥

41%

doing this well or very well

**Coordinating local relief
efforts** getting food, healthcare
services and financial support to
the most vulnerable members of
our community

⊥

43%

doing this well or very well

A black and white photograph of a person wearing a lab coat, a hairnet, and a face mask. They are working with a sample in a lab setting, possibly a hospital or research facility. The person is holding a small container and a piece of paper. The background shows a grid pattern, likely a window or a partition. The text "MOMENT OF RECKONING FOR BUSINESS" is overlaid on the image in a large, bold, white font. There are also some decorative elements: a small white crosshair-like symbol to the left of the text and a large, semi-transparent white circle on the right side of the image.

⊥

MOMENT OF RECKONING FOR BUSINESS

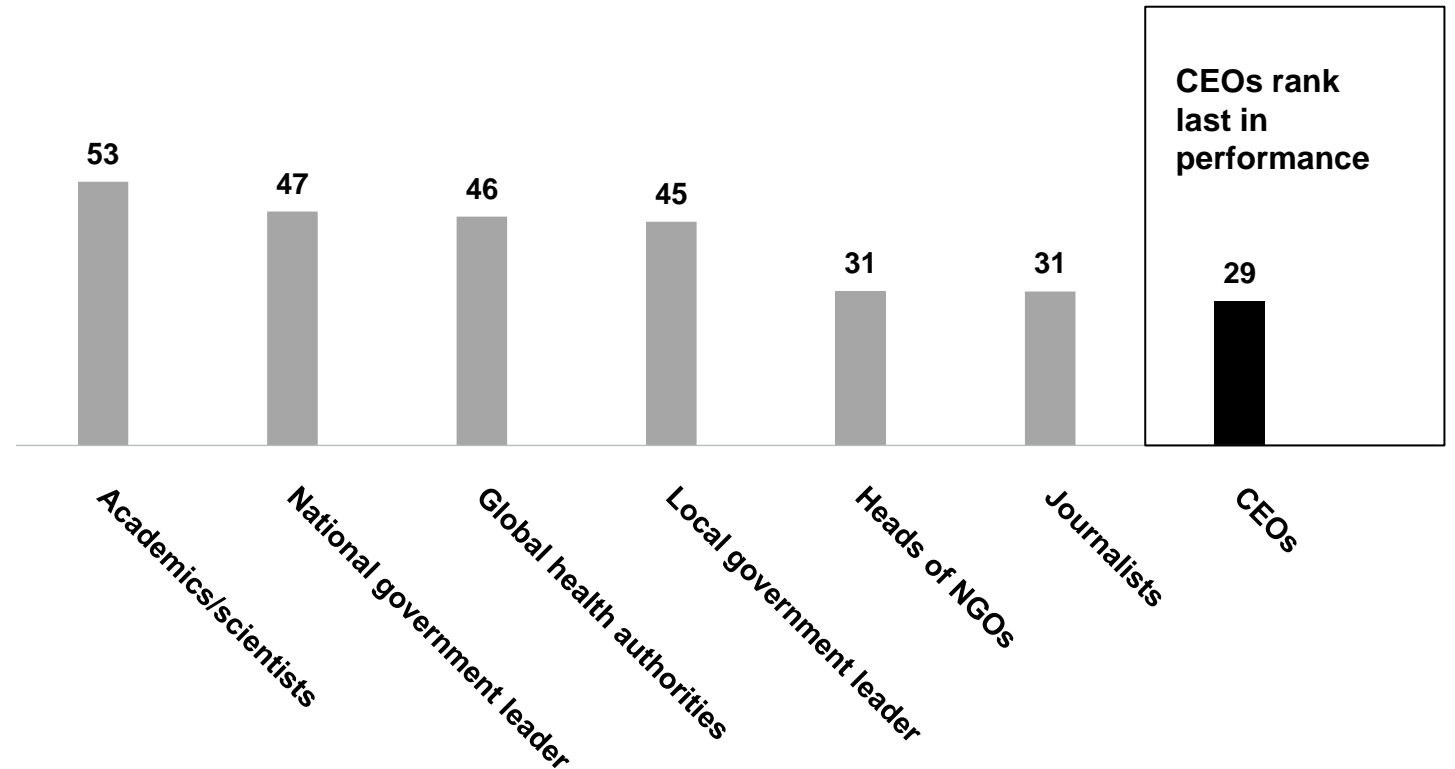
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CEOS FAILING TO DEMONSTRATE EXPECTED PUBLIC LEADERSHIP

CEOs should take the lead on addressing the pandemic rather than waiting for government to impose restrictions and demands on their businesses

└
65%

Percent who say each are doing **an outstanding job** meeting the demands placed on them by the pandemic



BUSINESS NOT SEEN AS MEETING THE CHALLENGE WITH EXPECTED LEVEL OF COMPETENCE

Percent who say business is performing well or very well on each

Ensuring the **products and services that people need most are readily available** and easily accessible

⊥

47%

doing this well or very well

Protecting essential employees whose jobs require them to work outside of their home thereby increasing their risk of exposure to the virus

⊥

44%

doing this well or very well

Preparing for the eventual recovery and figuring how to return things to normal as quickly as possible

⊥

42%

doing this well or very well

BUSINESS NOT SEEN AS LOOKING OUT FOR EMPLOYEES OR BUSINESS PARTNERS

Percent who say business is performing well or very well on each

**Putting people
before profits**

⊥

38%

doing this well or very well

**Protecting their employee's
financial wellbeing and
safeguarding their jobs**

⊥

39%

doing this well or very well

**Helping their smaller
suppliers and business
customers stay in business by
extending them credit or giving
them more time to pay**

⊥

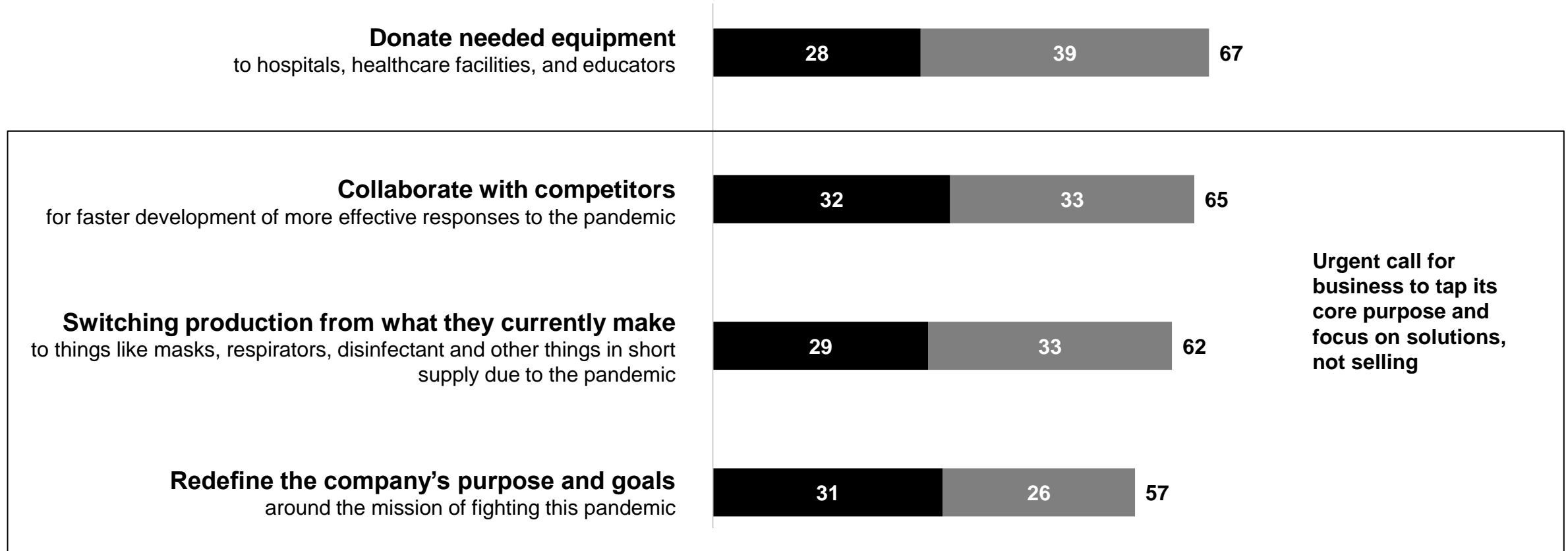
38%

doing this well or very well

TO INCREASE TRUST, BUSINESS MUST JOIN THE FIGHT AGAINST THE PANDEMIC

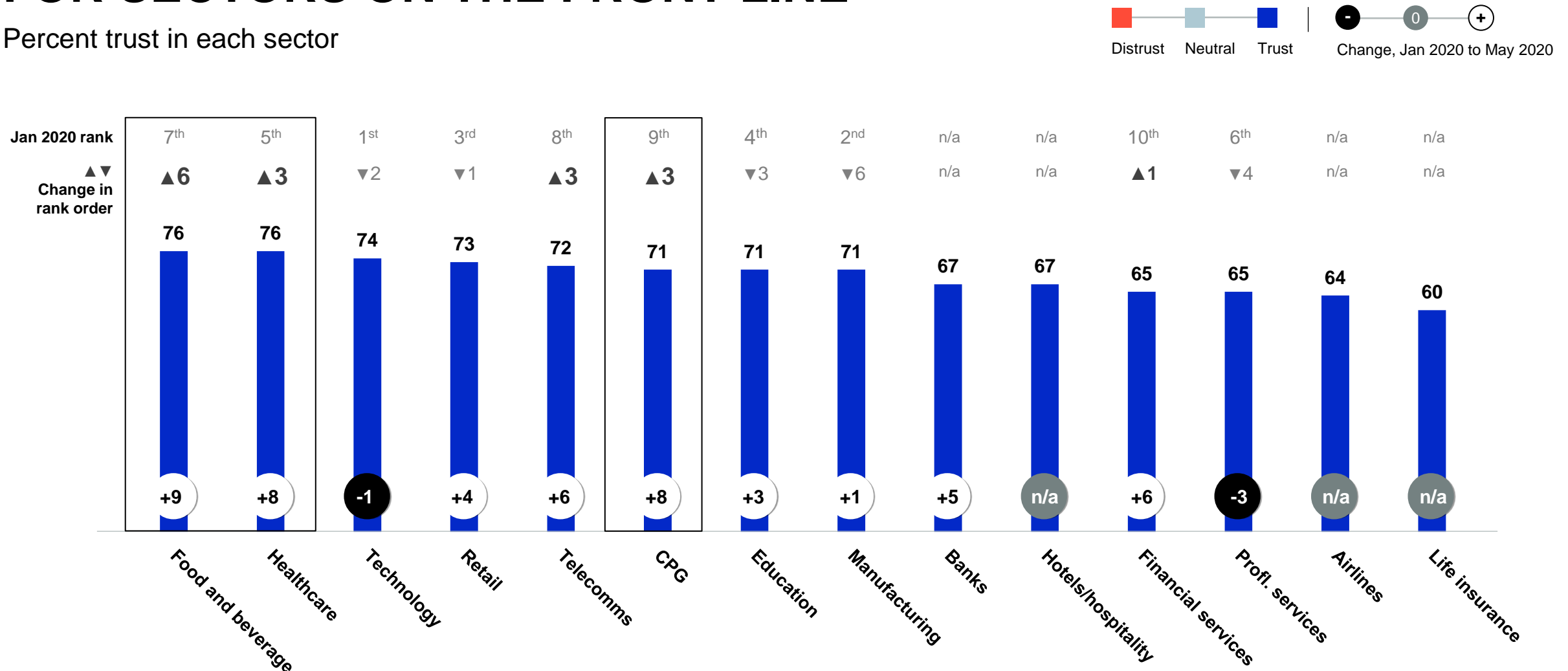
Percent who indicate that the below actions will maintain or increase their trust in business

■ Maintain ■ Increase



GREATEST TRUST GAINS TO DATE FOR SECTORS ON THE FRONT LINE

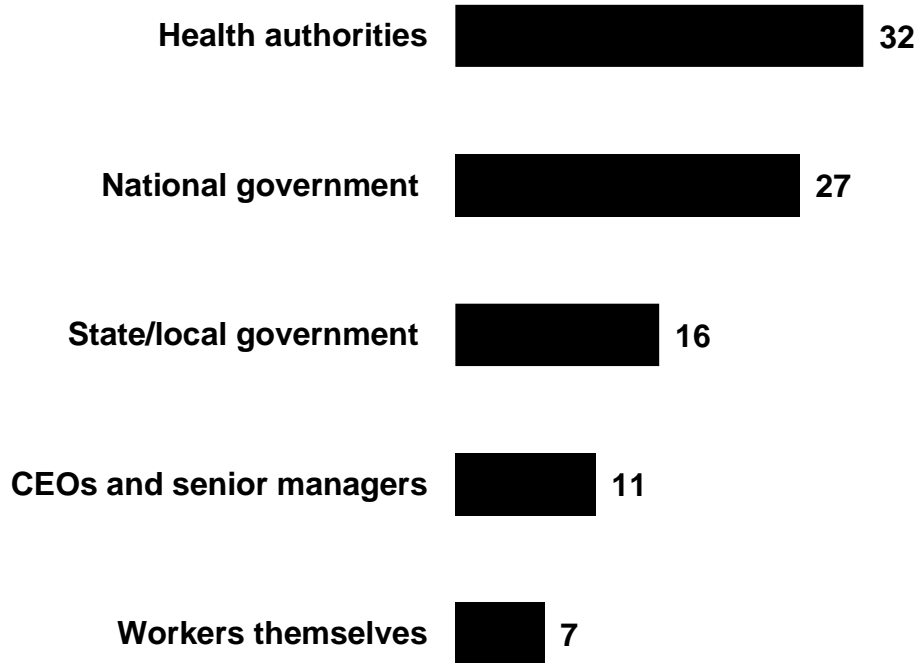
Percent trust in each sector



2020 Edelman Trust Barometer Spring Update. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg. Some 2019 data was only asked of one-fifth of the sample.

BUSINESS MUST PARTNER WITH GOVERNMENT FOR RESPONSIBLE RETURN TO WORK

Percent who say each should lead in making remaking turn to work decision:



Which best describes how you want CEOs to respond to the pandemic?

CEOs should be conservative
in getting back to normal operations, even if it means waiting to bring people back to work until the virus has been brought under control

OR

CEOs should be aggressive
in getting back to normal operations even if it means bringing people back to work sooner than health officials recommend

75%

25%

PRIORITIZE HEALTH AND SAFETY

Which do you agree with more?

2020 Edelman Trust Barometer Spring Update. GOV_CHOICE.
You are about to see a series of two choices. For each pair, we want
you to choose the one that you agree with more. General
population, 11-mkt avg.

The government's highest priority
should be **saving as many lives
as possible**, even if it means the
economy will sustain more damage
and recover more slowly

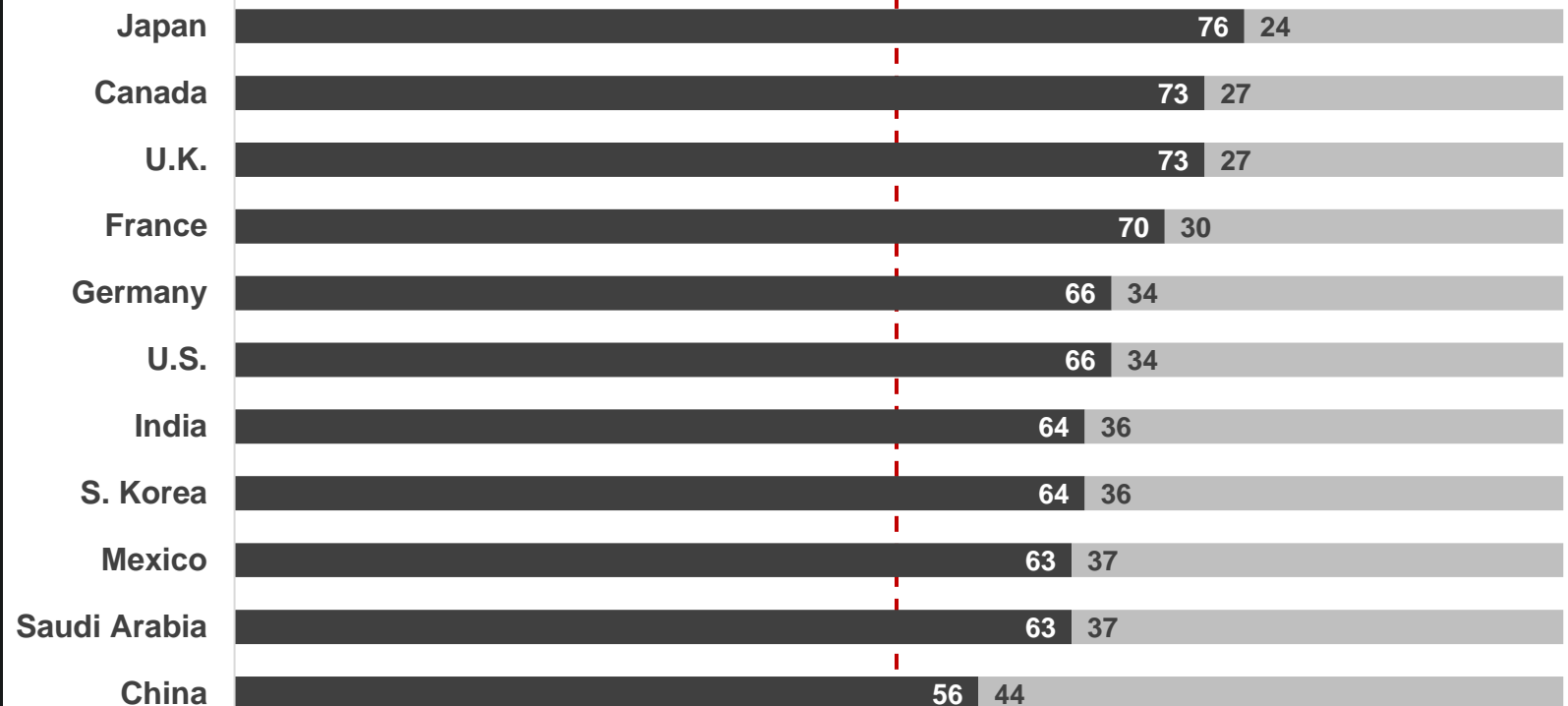
OR

It is becoming more important for the
government **to save jobs and
restart the economy** than to take
every precaution possible to keep
people safe from the virus

67%

33%

Global 11

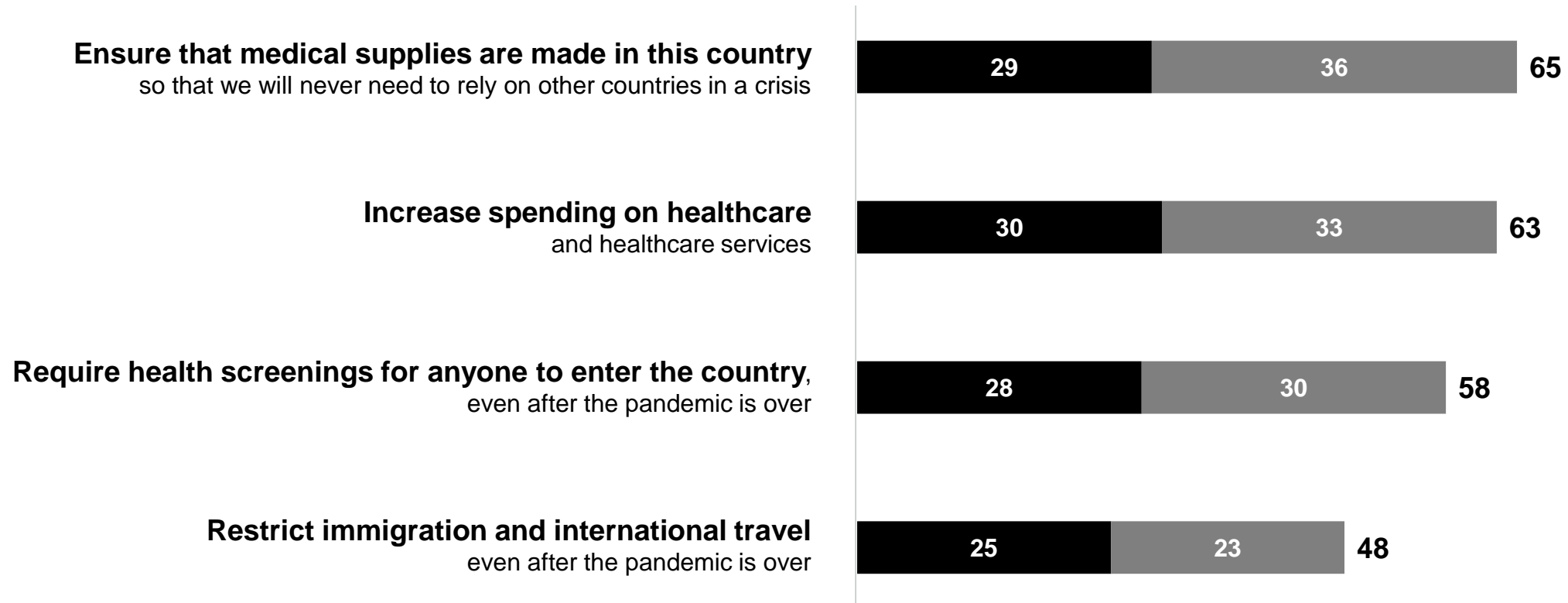


50%

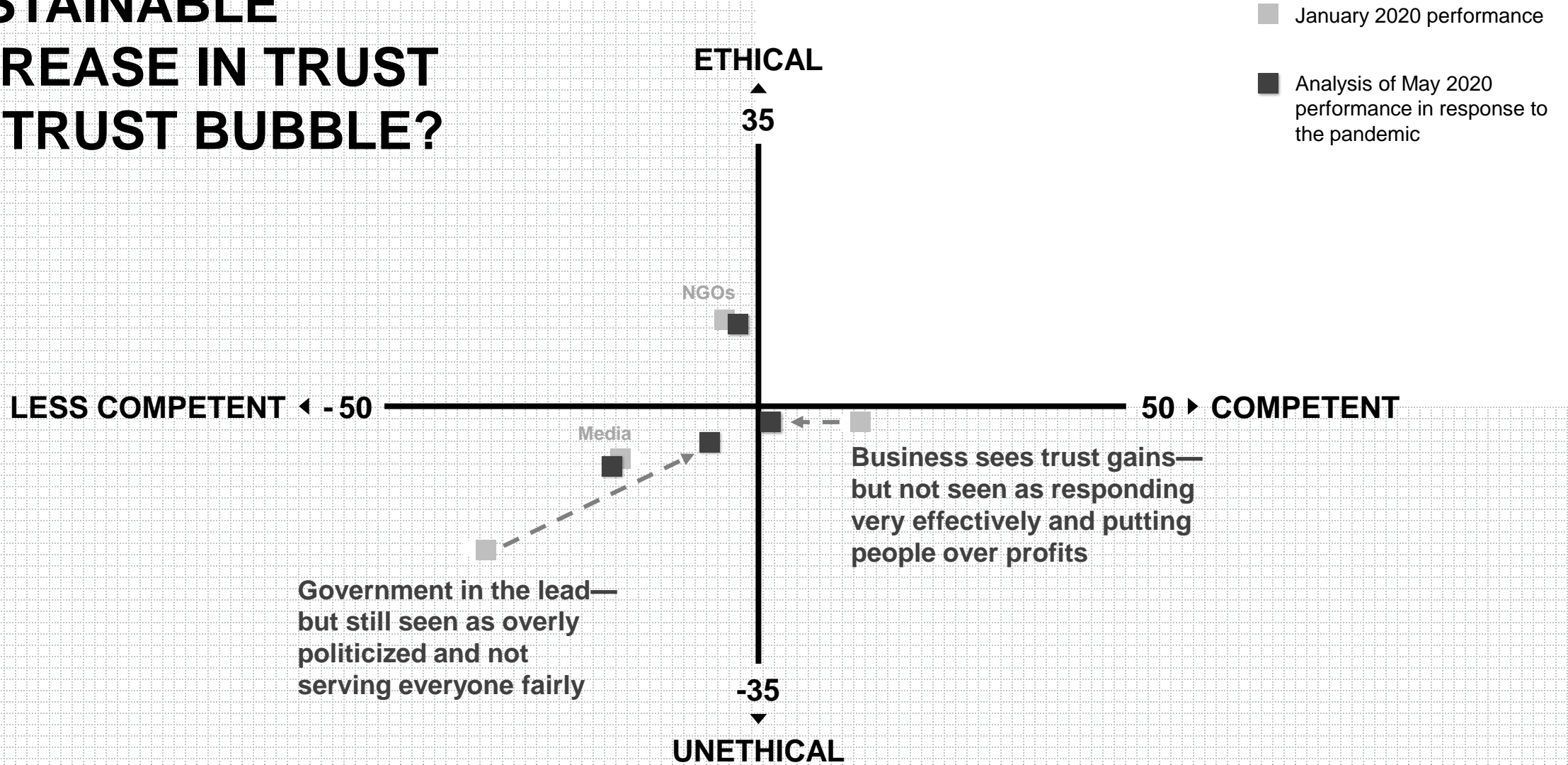
GOVERNMENT MUST BUILD A MORE RESILIENT SYSTEM FOR THE FUTURE

Percent who indicate that the below actions will maintain or increase their trust in government

■ Maintain ■ Increase



SUSTAINABLE INCREASE IN TRUST OR TRUST BUBBLE?



January 2020 placement of institutions based on the 2020 Edelman Trust Barometer analysis of net ethical and competence scores for each dimension. For full details regarding how these scores were calculated and plotted, please see the Technical Appendix of the January 2020 Edelman Trust Barometer report. May 2020 performance based on analysis of the average net scores for NEW_PER_[INSTITUTION] in the 2020 Edelman Trust Barometer Spring Update. NEW_PER_[INSTITUTION]. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe [insert institution] is currently doing each of the following? General population, 11-mkt avg. *May 2020 data for “government” is based on a 10-mkt avg that excludes China. For a full explanation of the analysis done, please refer to the Technical Appendix.

A MOMENT OF RECKONING

1.

**Tangible action
needed to
preserve trust
for the long term**

2.

**Business and
government
must collaborate
on solutions**

3.

**Business must
live up to its
multi-
stakeholder
promise**

4.

**CEOs must
demonstrate
public
leadership**

5.

**The return to
work is the
test for trust**