

# 2017 Edelman Trust Barometer for the Government of Canada



April 10, 2018

# Background

The scope of this work involves Edelman pulling data from its 2017 Edelman Trust Barometer and analyzing for compelling audience differences and variances of trust among demographic groups.

Edelman's 2017 Trust Barometer ran from October 17, 2016 to November 13, 2016. The survey is facilitated by Survey Sampling International (SSI). SSI has the largest global presence of any company in our category, with over 10 million panelists in 100+ countries. SSI's panel is proprietary, so it is constantly monitored, optimized and protected by SSI. SSI employs a proprietary ad network made up of social, mobile, display, search, SEO, email, influencer and other digital marketing channels to provide a well-balanced panel population. A team of digital media buyers rely on established partnerships and constant recruitment of new suppliers and technologies to keep the panel fresh and diverse. All recruits go through SSI's rigorous fraud and quality controls within SSI's sampling platform prior to participating in any surveys.

SSI's survey management platform, Dynamix™, leverages their own panels as well as participants from online communities, affiliate partners, and more. They treat all these incoming respondents as streams of people from multiple sources and Dynamix™ does the verification, real time profiling, the random selection based on project requirements, etc. This multi-sourcing model increases reach and capacity, improves consistency, and minimizes bias. Capacity helps SSI fill studies quickly and easily; reach adds diversity of sample frames, and improves representivity. With a large number of diverse frames, sample is less vulnerable to the loss of a source, or to changes within individual sources.

Please note that while the Edelman Trust Barometer is in its 18th year and currently has 2018 data, the main contents of this report includes 2017 data.

# The Objectives

- 1 Review Canadian general population survey findings from the 2017 Edelman Trust Barometer to uncover demographic similarities and differences involving trust in government as an institution and perceived credibility of government officials; and
- 2 Compare the demographic findings regarding trust in government and credibility of government officials with demographic findings regarding trust in other institutions and credibility of other officials, with a view to determining to what extent demographic patterns regarding trust in government represent a unique phenomenon or, conversely, are part of a broader phenomenon involving trust in institutions generally.

# 2017 Edelman Trust Barometer Methodology

## Online Survey in 28 Countries

- 17 years of data
- 33,000+ respondents total
- All fieldwork was conducted between October 17<sup>th</sup> and November 16<sup>th</sup>, 2016

## Canadian Data

- Survey in field Oct. 17-Nov. 13, 2016
- 1,150 General Population interviews
- 200 Informed Public interviews
- *The estimated margin of error for the sample is +/- 2.81% at a 95% confidence interval.*
- *Letters **A-O** denote statistical significance at a 95% confidence level.*



### General Online Population

6 years in 25+ markets  
Ages 18+  
1,150 respondents per country

All slides show General Online Population unless otherwise noted



### Informed Public

9 years in 20+ markets  
Represents 13% of total global population  
500 respondents in U.S. and China; 200 in all other countries

Must meet 4 criteria:

- Ages 25-64
- College educated
- In top 25% of household income per age group in each country
- Report significant media consumption and engagement in business news



### Mass Population

All population not including Informed Public  
Represents 87% of total global population

28-country global data margin of error: General Population +/- 0.6% (N=32,200), Informed Public +/- 1.2% (N=6,200), Mass Population +/- 0.6% (26,000+). Country-specific data margin of error: General Population +/- 2.9 (N=1,150), Informed Public +/- 6.9% (N = min 200, varies by country), China and U.S. +/- 4.4% (N=500), Mass Population +/- 3.0 to 3.6 (N =min 740, varies by country), half sample Global General Online Population +/- 0.8 (N=16,100).

# Demographic Areas of Exploration

1. Demographic similarities and differences in trust in government to be analyzed by:
  - Gender (Male/Female)
  - Age (18-34/35-54/55+)
  - Education (Less than university /University degree+)
  - Household Income (Less than 40k/40k-99,999/100k+)
  - Region (Atlantic Canada/Quebec/Ontario/Prairies/B.C.)
  
2. Question wording:
  - Gender: “Are you male or female?”
  - Age: “What is your current age?”
  - Education: “What is the last grade in school you completed?”
  - Income: “Thinking about your annual household income in 2015, which of the following categories best describes your total household income that year?”
  - Region: “Where do you live?”

Counts for Trust Data (n)	CANADA
<b>TOTAL BASE</b>	1,150
<b>GENDER</b>	
Male	564
Female	586
<b>AGE</b>	
Millennials (18-34)	311
GenX (35-54)	393
Boomers (55+)	446
<b>EDUCATION</b>	
Less than University	730
University Degree+	419
<b>INCOME</b>	
Under \$40,000	300
\$40,000 - \$99,999	546
\$100,000+	225
<b>REGION</b>	
Atlantic	82
British Columbia	150
Quebec	272
Ontario	449
Prairies	196

# This deck is an overview of the following...



## Trust in Government

**Trust in Institutions:** “Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.



## Leadership

**Credibility of Spokespeople:** “Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all?”



## Media

**Trust in Types of Media:** “When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”.

# Trust in Retrospect

<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	"A Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young Influencers Have More Trust in Business	Business Must Partner with Government to Regain Trust
<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	
Trust is Now an Essential Line of Business	Rise of Authority Figures	Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	<b>Trust in Crisis</b>	

# Insights

- In 2017, Trust in Canada slipped into distruster territory.
- Trust in Government has been in distruster territory since 2012.
  - In 2016, Government increased into neutral. However, Government has since fallen back into distruster category.
- Trust in government is on par between men and women.
- Those with at least a university education are significantly more likely to trust Government.
- As income increases, so does trust in Government. This is especially true for Canadians making more than \$100,000.
- While still in the distruster category, Quebec enjoys the highest trust levels of Government when compared to other provinces.
  - The Atlantic provinces show the lowest ratings of trust in Government.
- Credibility of authoritative voices is slipping across all categories including CEOs and academic experts. This is also true for government officials.
  - Higher income, Millennial men, and those with a university degree tend to be more trusting of government leadership.



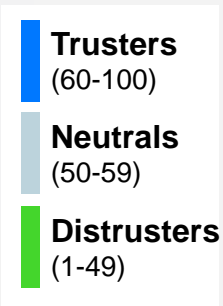
# Insights Continued

- Younger generations, those in the middle income bracket, and those with a university education tend to find NGO representative's more credible.
- Men and those with a university education tend to find journalists more credible than other demographic groups.
- While traditional media used to be the most trusted source of media, that is slowly eroding and search (e.g., Google, Yahoo!, or Bing) is gaining momentum as a preferred source of information.
- Boomers tend to be more trusting of traditional media.
- GenX are significantly more likely to trust online media when compared to Boomers.
- British Columbia and Quebec tend to use social media more than other provinces.

# Trust Index

## Historically neutral, Canada officially slips to the 'distruster' category in 2017

Average trust in institutions, General Population  
2015, 2016, 2017



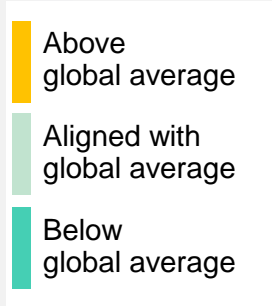
Source: 2017 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. General Population, 28-country global total.



# Canada on the tipping point

Systemic loss of faith restricted to Western-style democracies

Per cent of population who believe the system is not working



In 14 countries, the percent of population that has lost faith is above the global average

	Global	France	Italy	Mexico	S. Africa	Spain	Poland	Brazil	Colombia	Germany	U.K.	Australia	Ireland	U.S.	Netherlands	Canada	Sweden	Argentina	Malaysia	Turkey	Russia	S. Korea	Indonesia	Japan	India	Hong Kong	Singapore	China	UAE
System failing	53	72	72	67	67	67	64	62	62	62	60	59	59	57	56	55	55	53	52	51	48	48	42	42	36	35	30	23	19
Uncertain	32	22	24	25	24	25	25	25	27	26	29	30	26	33	33	30	29	29	37	31	28	41	40	45	45	50	43	47	40

Source: 2017 Edelman Trust Barometer Q672-675, 678-680, 688-690.

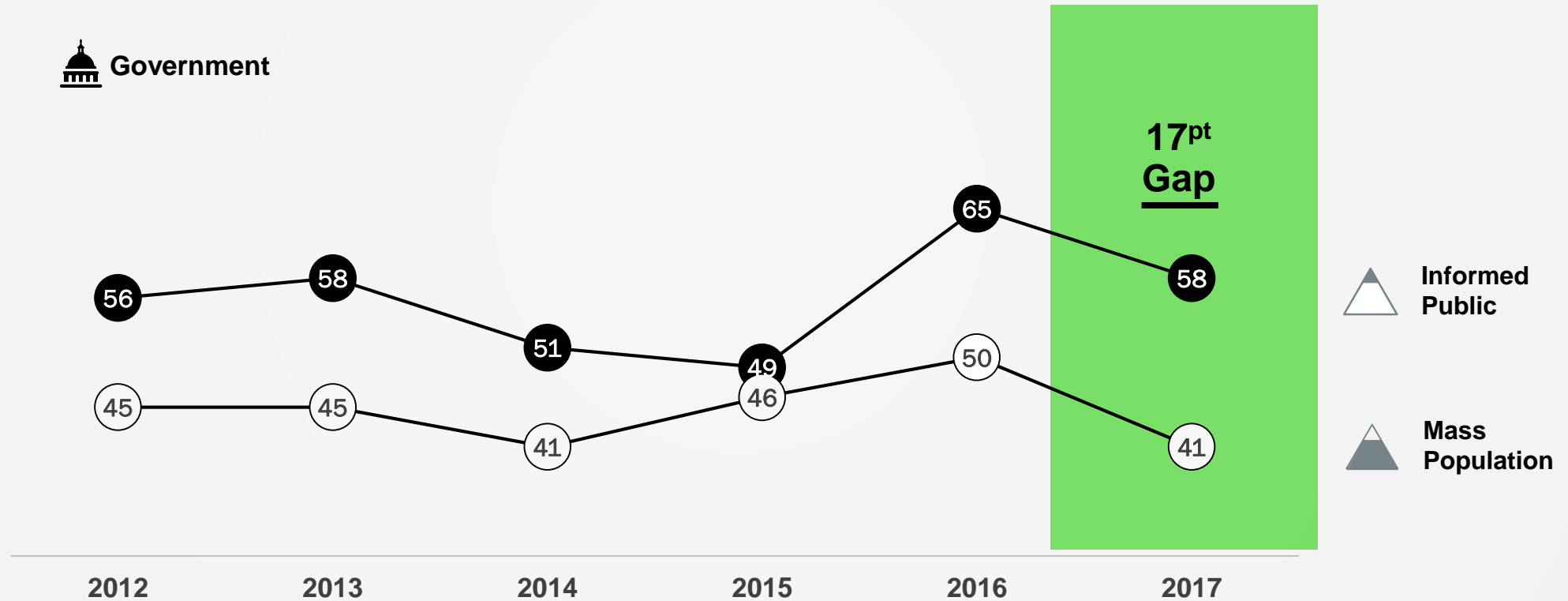
For details on how the “system failing” measure was calculated, please refer to the Technical Appendix. The margin of error for the countries scores was added and subtracted from the global mean. Countries were considered above the global average if their score was higher than the global mean plus the margin of error. Countries were considered below the global average if their score was lower than the global mean minus the margin of error. All other scores were considered aligned.

# TRUST IN GOVERNMENT



# Trust in Government: A significant divide

Per cent trust in government, 2012 vs. 2017

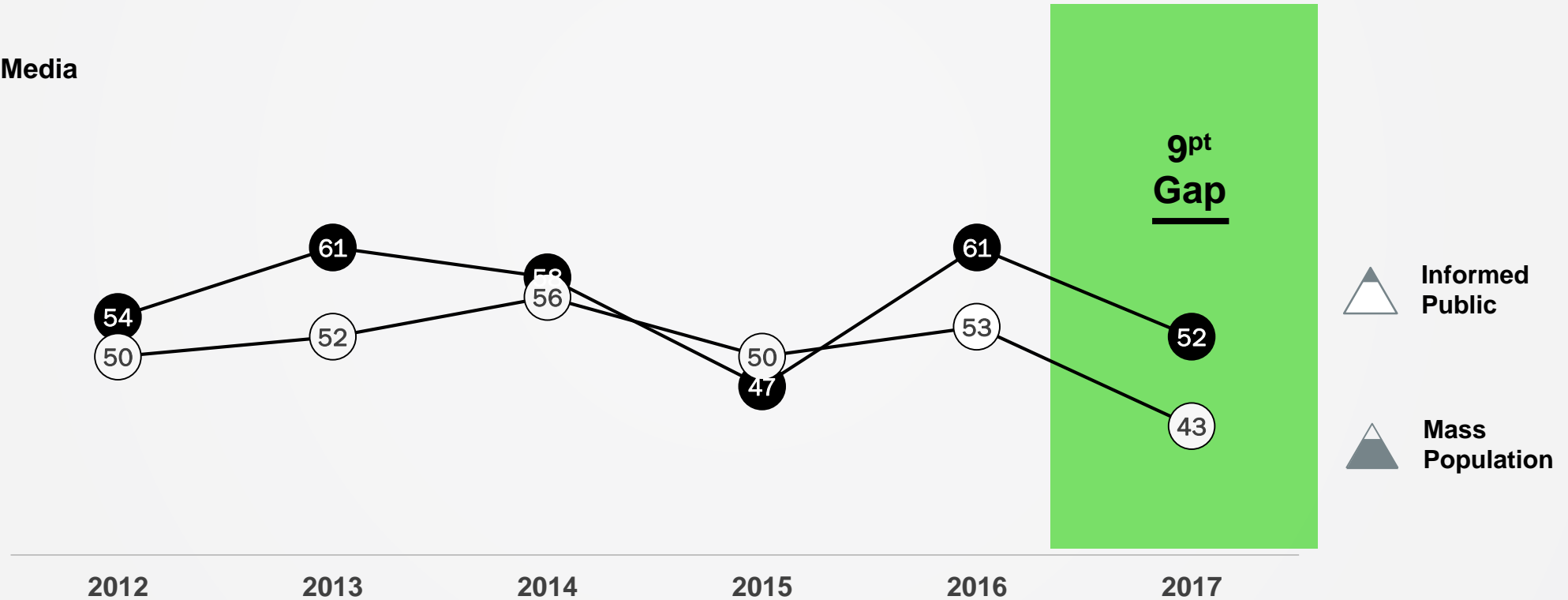


Source: 2017 Edelman Trust Barometer Q11-14. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and Mass Population, Canada.



# Trust in Media: Consistent dips among Informed Public and Mass Population

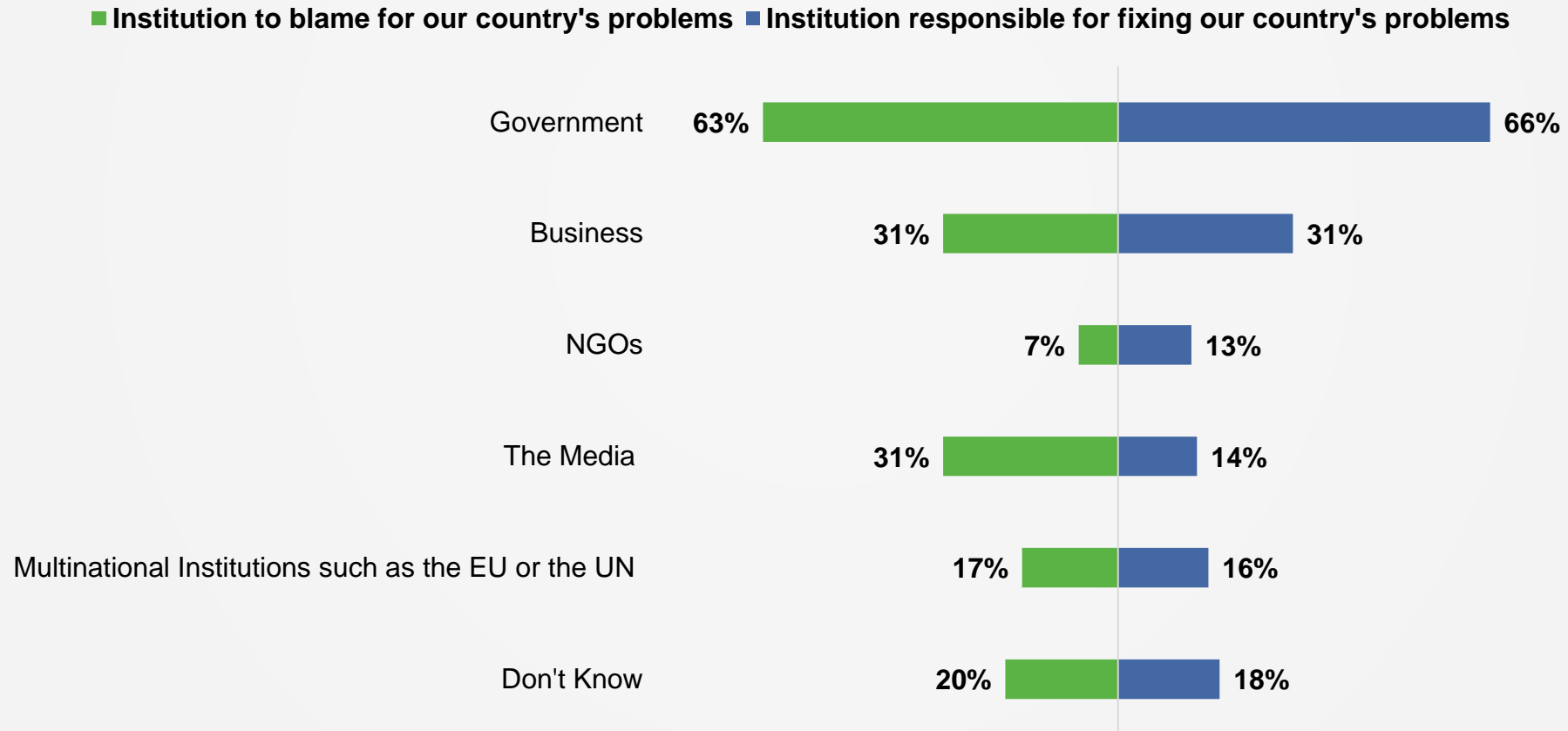
Per cent trust in media, 2012 vs. 2017



Source: 2016 Edelman Trust Barometer Q11-14. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and Mass Population, Canada.



# Government assigned blame & responsibility for fixing our problems



Source: 2017 Edelman Trust Barometer Q691. Which of the following do you believe are most to blame for the problems we face in our country today? Q692. Which of the following do you believe are most responsible for fixing the problems we face in our country today? General Population, Canada.



# What Canada is worried about

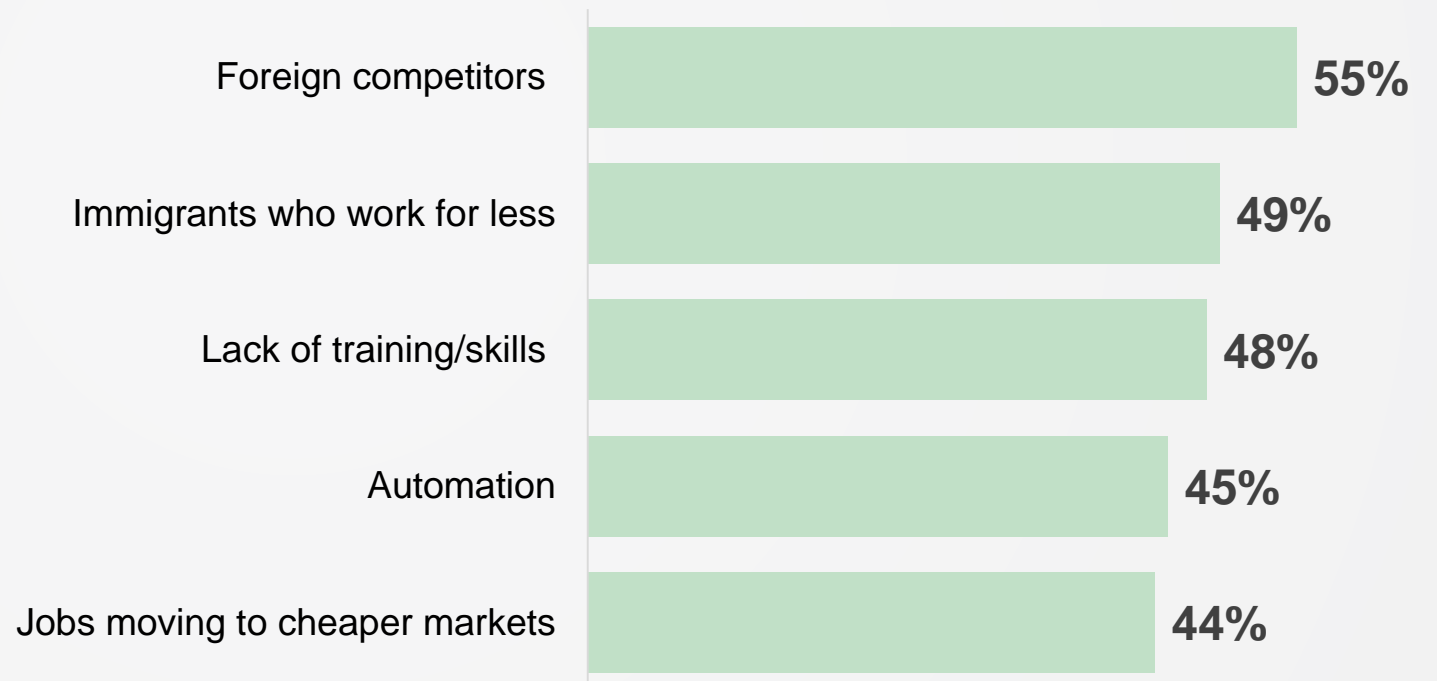
**53%** the pace of change

in business and industry is  
**too fast**

**48%** globalization

is taking us in the  
**wrong direction**

## CANADIANS WORRY ABOUT LOSING THEIR JOBS DUE TO:



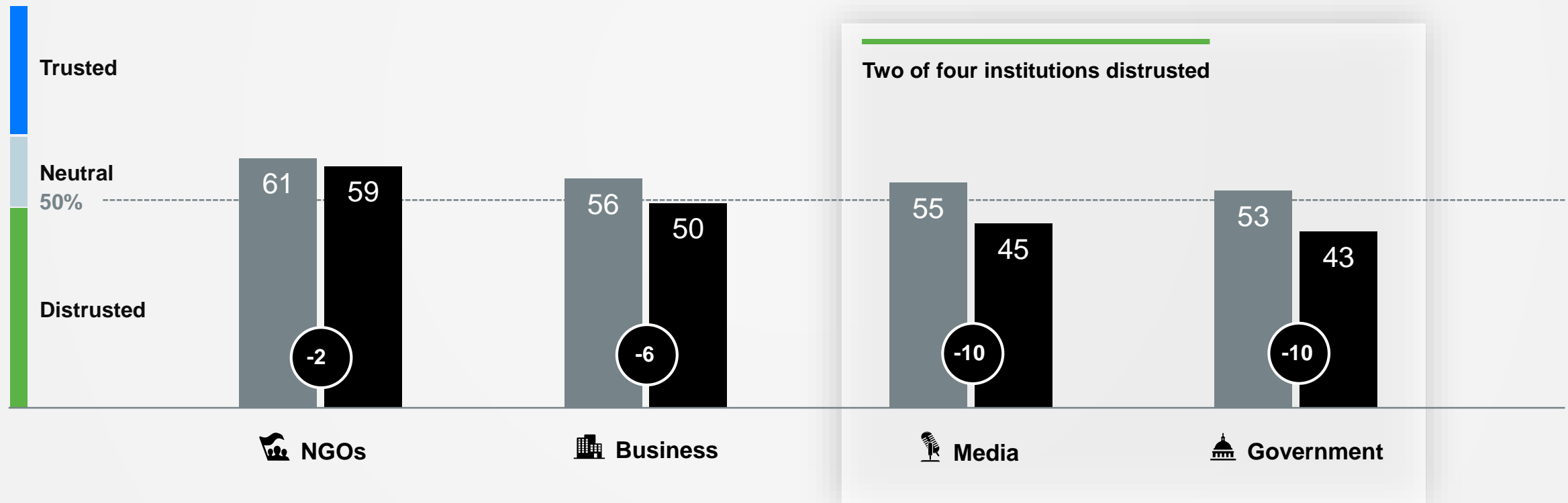
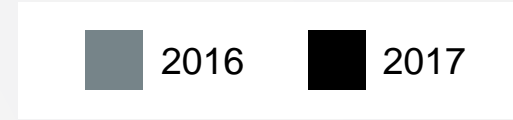
Source: 2017 Edelman Trust Barometer. Q693-762. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? Please indicate your answer using a nine point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". (Top 4 Box, Worried) Q709-718. For each of the statements below, please indicate how much you agree or disagree. (Top 4 Box, Agree) General Population, Canada. Q349-671. For the statements below, please think about the pace of development and change and select the response that most accurately represents your opinion. (Top 4 Box, Too Fast) General Population, Canada, question asked of half the sample.





# Trust in all four institutions declines in 2017

Per cent trust in the four institutions of government, business, media and NGOs, 2016 vs. 2017



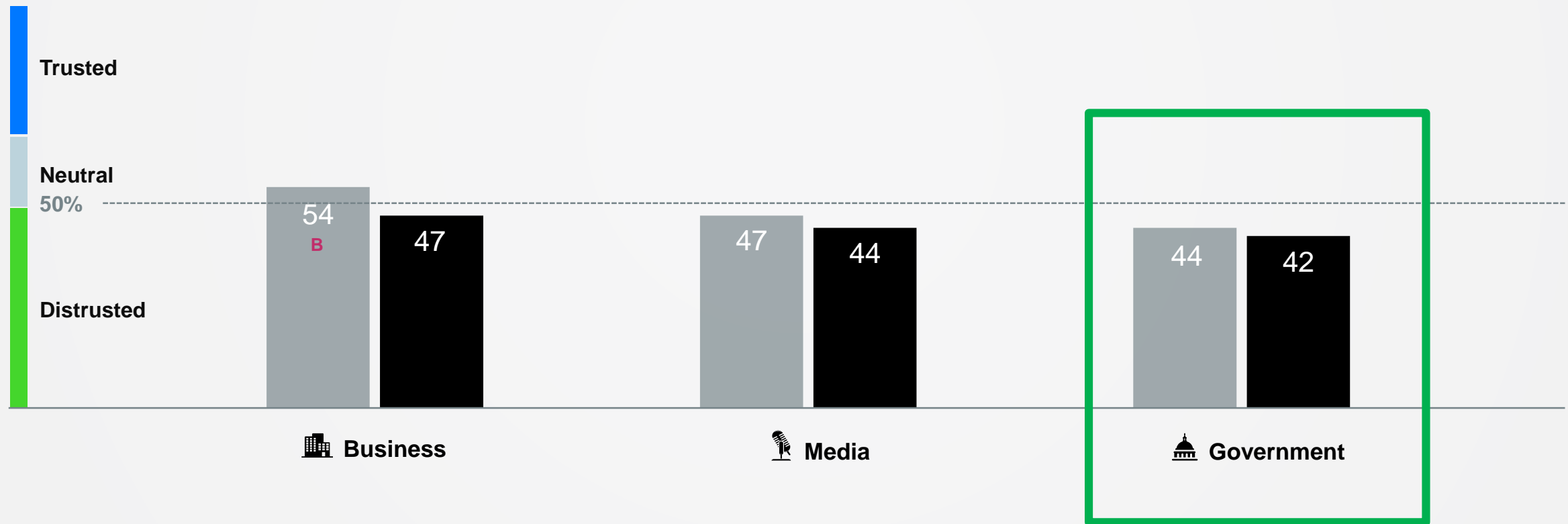
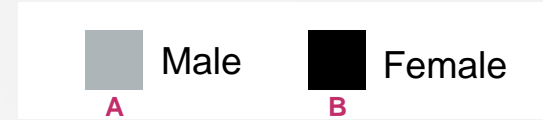
Source: 2017 Edelman Trust Barometer. Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, Canada.





# Government is distrusted and trends on par between men and women.

Per cent trust in the three institutions of government, business, and media by gender



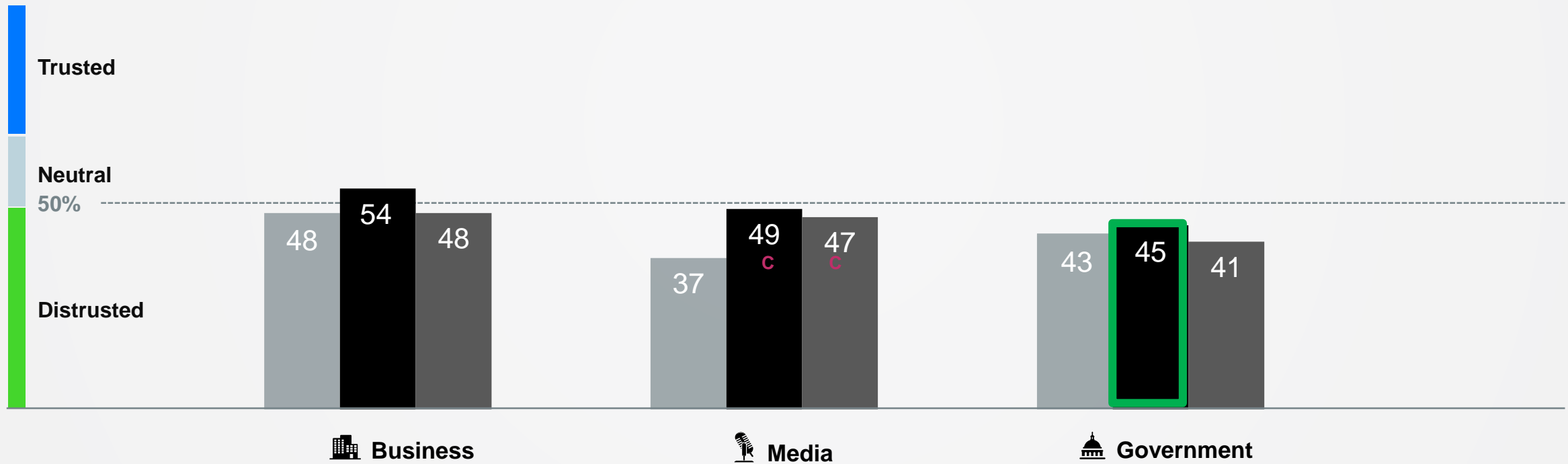
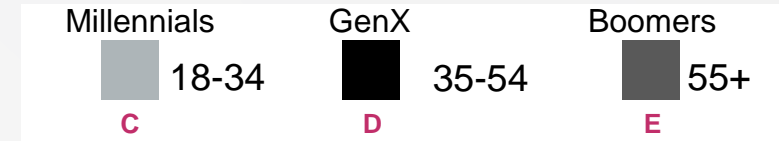
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# Most age groups are still in the distruster category, however GenX are slightly more trusting.

Per cent trust in the three institutions of government, business, and media by age



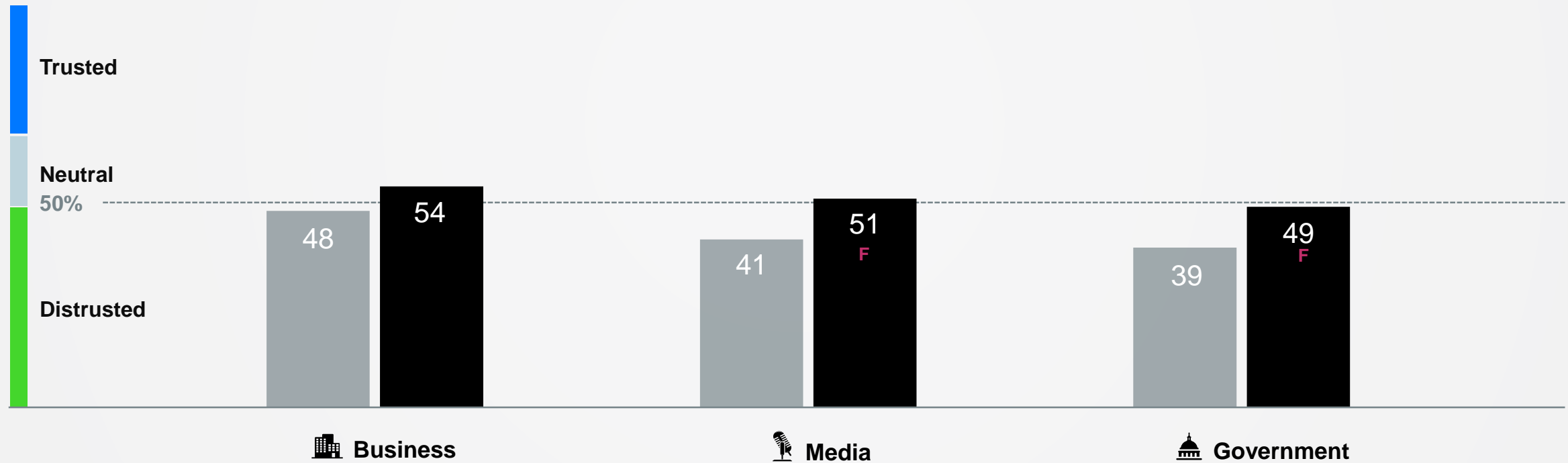
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# Those with university or more education tend to trust media and government more.

Per cent trust in the three institutions of government, business, and media by education

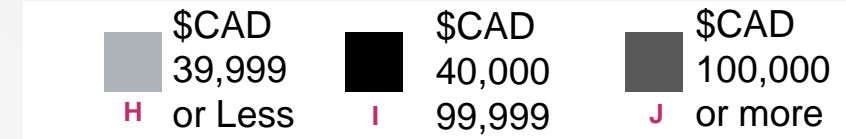


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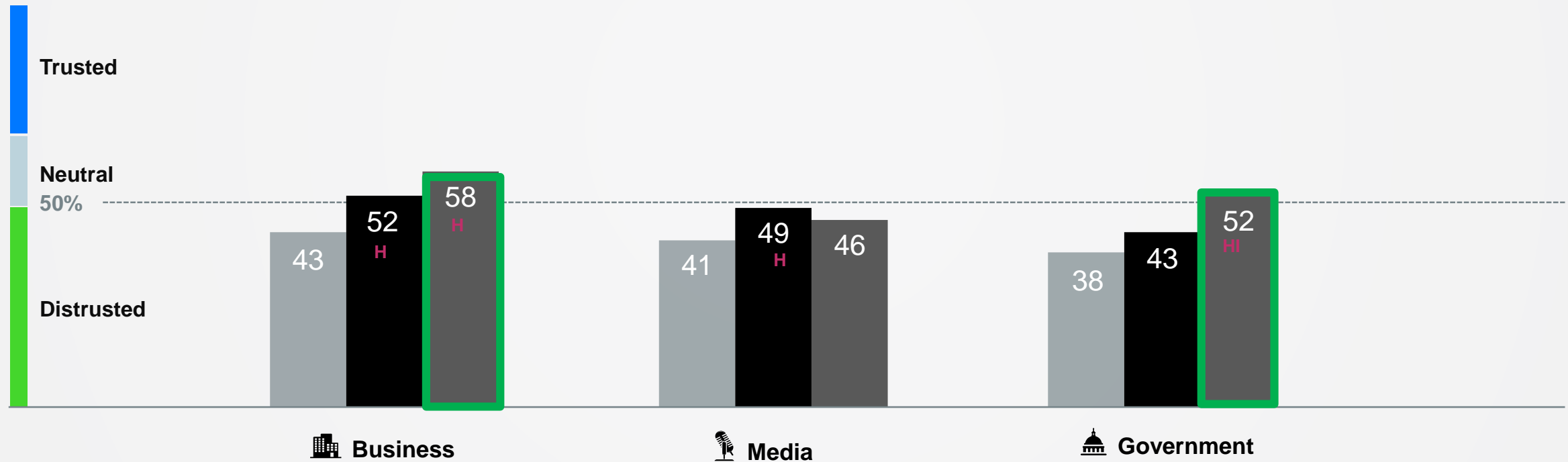




# Upper income brackets tend to have more trust in Business and Government.



Per cent trust in the three institutions of government, business, and media by income



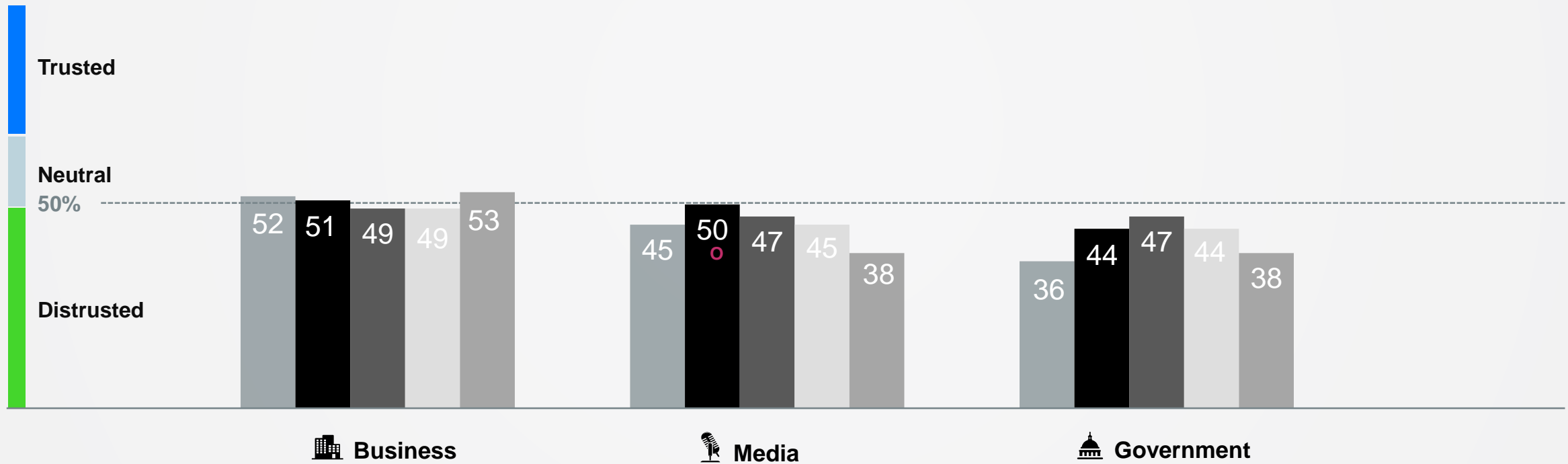
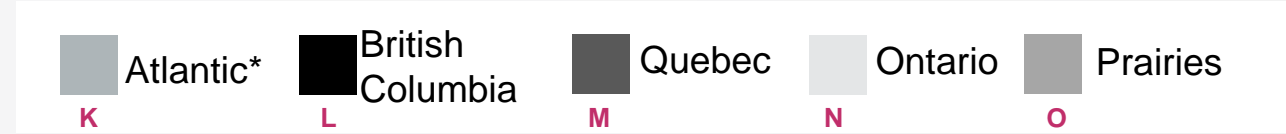
Source: 2017 Edelman Trust Barometer. Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, Canada by income.





# The strongest trustor province of Government is Quebec.

Per cent trust in the three institutions of government, business, and media by region



Source: 2017 Edelman Trust Barometer. Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, Canada by region.

\*Please note lower than recommended sample size (n=82), findings are directional in nature.



# Overview of Trust in Institutions

Per cent trust in the three institutions of government, business, and media

	Trust in Government	Trust in Media	Trust in Business
Male (A)	44	47	54 <b>B</b>
Female (B)	42	44	47
Millennials (C)	43	37	48
GenX (D)	45	49 <b>C</b>	54
Boomers (E)	41	47 <b>C</b>	48
Less than University (F)	39	41	48
University+ (G)	49 <b>F</b>	51 <b>F</b>	54
\$39,999 or less (H)	38	41	43
\$40,000-\$99,999 (I)	43	49 <b>H</b>	52 <b>H</b>
\$100,000 or more (J)	52 <b>HI</b>	46	58 <b>H</b>
Atlantic (K)	36	45	52
British Columbia (L)	44	50 <b>O</b>	51
Quebec (M)	47	47	49
Ontario (N)	44	45	49
Prairies (O)	38	38	53

Source: 2017 Edelman Trust Barometer. Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, Canada by gender.



# TRUST IN GOVERNMENT OFFICIALS





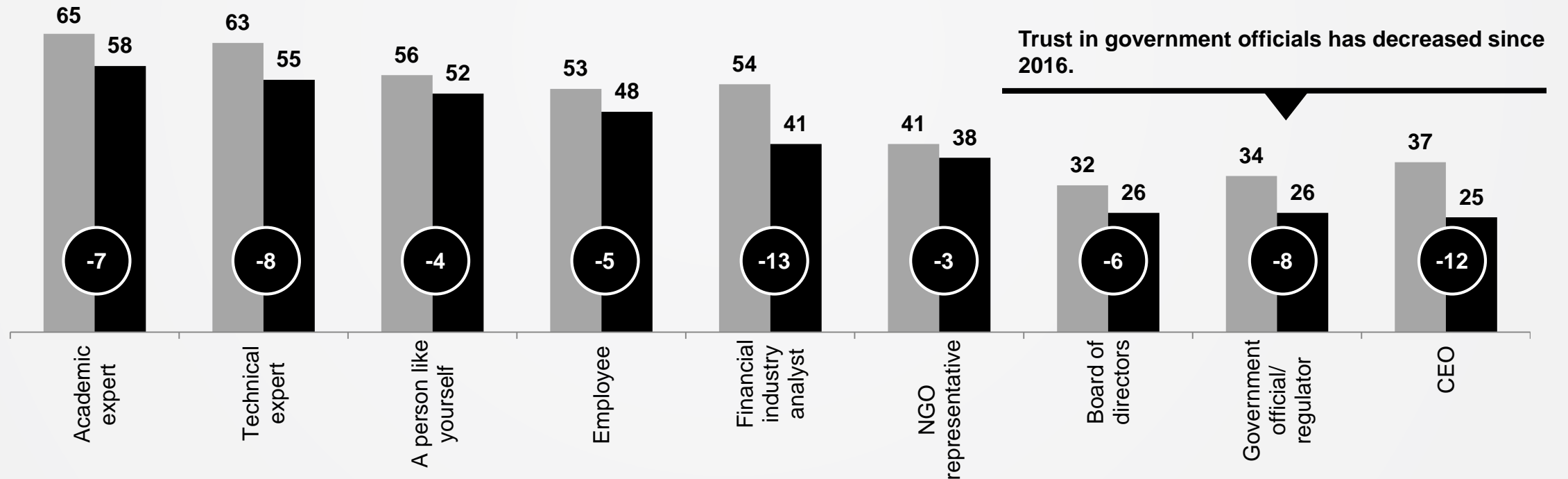


# Credibility of experts is slipping fast.

Per cent who rate each spokesperson as extremely/very credible, and change from 2016 to 2017

2016 2017

- + Y-to-Y Change



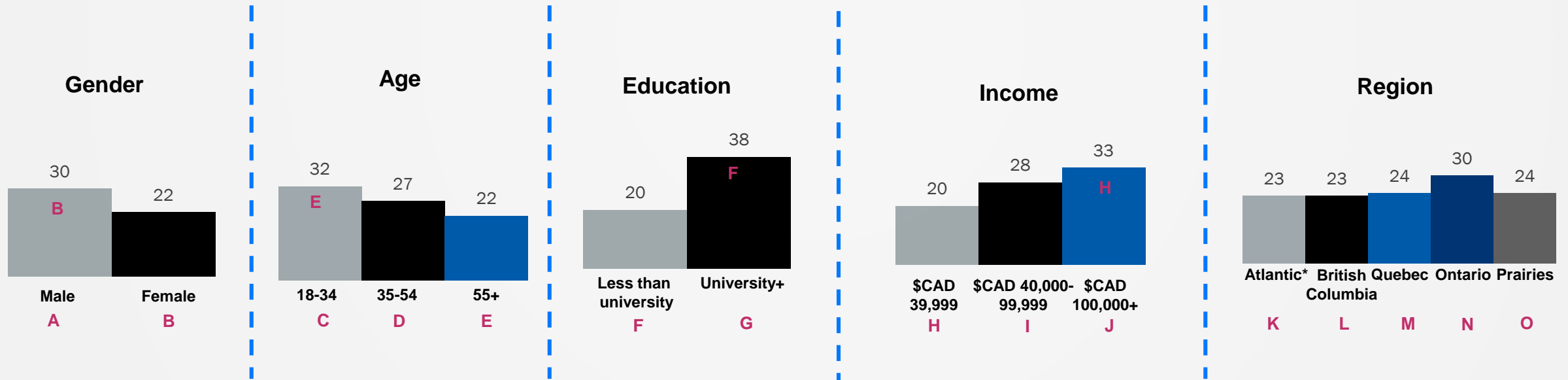
Source: 2017 Edelman Trust Barometer. Q130-747 Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible) General Population, Canada, question asked of half the sample.  
From original 2017 Trust report.





# Higher income, millennial men, and those with a university degree tend to be more trusting of government officials.

Per cent credibility in a government official by gender, age, education, income, and region



Source: 2017 Edelman Trust Barometer. Q130-747. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Credible), question asked of half of the sample. General Population, Canada by gender, age, education, income and region.

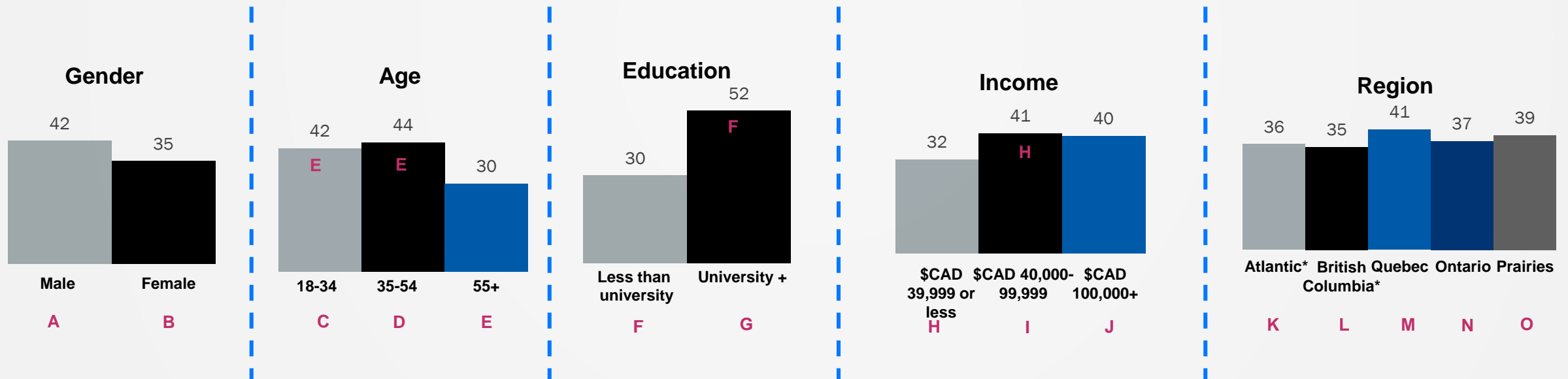
\*Please note lower than recommended sample size (n=82), findings are directional in nature.





# Younger generations, those in the middle income bracket, and those with a university education tend to find NGO representatives more credible.

Per cent credibility in a non-profit/ NGO representative by gender, age, education, income, and region



Source: 2017 Edelman Trust Barometer. Q130-747. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Credible), question asked of half of the sample. General Population, Canada by gender, age, education, income and region.

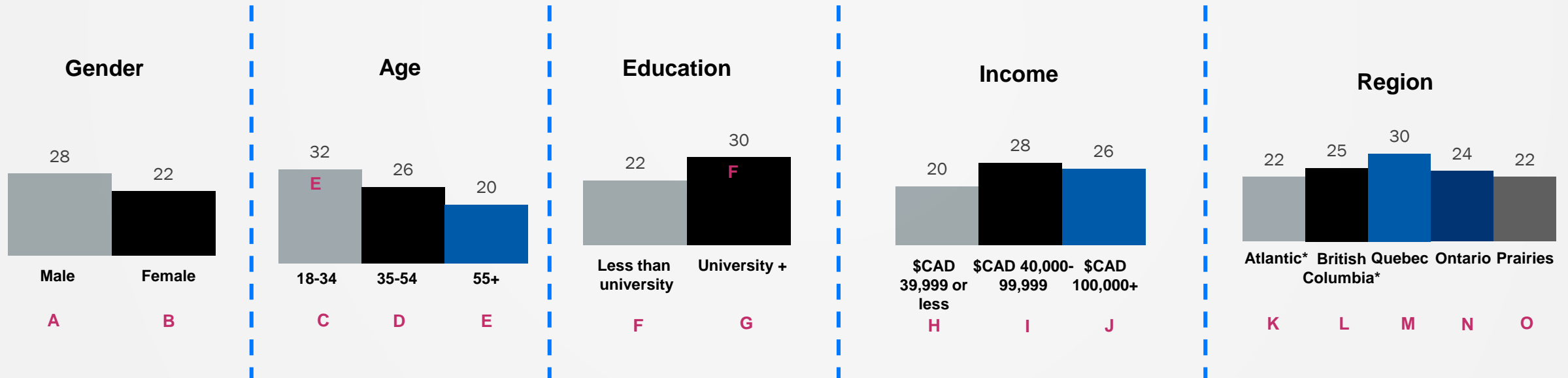
\*Please note lower than recommended sample size (n=82), findings are directional in nature.





# Millennials, and university educated individuals tend to find CEOs more credible.

Per cent credibility in a CEO by gender, age, education, income, and region



Source: 2017 Edelman Trust Barometer. Q130-747. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Credible), question asked of half of the sample. General Population, Canada by gender, age, education, income and region.

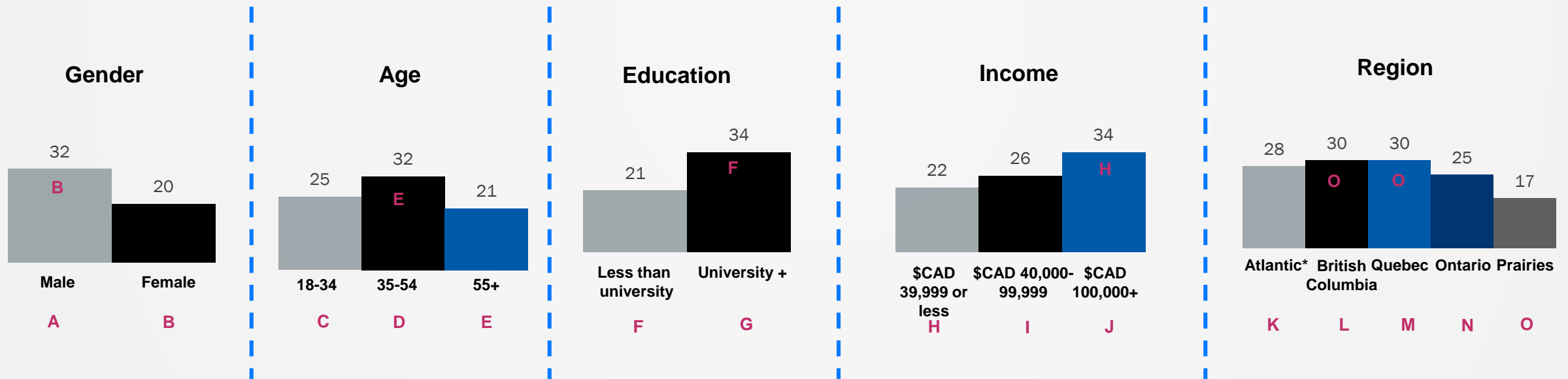
\*Please note lower than recommended sample size (n=82), findings are directional in nature.





# Men and those with a university education tend to find journalists more credible than other demographic groups.

Per cent credibility in a journalist by gender, age, education, income, and region



Source: 2017 Edelman Trust Barometer. Q130-747. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be--extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Credible), question asked of half of the sample. General Population, Canada by gender, age, education, income and region.

\*Please note lower than recommended sample size (n=82), findings are directional in nature.



# Overview of Trust in Leadership

Per cent trust in leadership, by demographics

	Trust in Government Officials	NGO Representatives	Trust in CEOs	Trust in Journalists
Male (A)	30 <b>B</b>	42	28	32 <b>B</b>
Female (B)	22	35	22	20
Millennials (C)	32 <b>E</b>	42 <b>E</b>	32 <b>E</b>	25
GenX (D)	27	44 <b>E</b>	26	32 <b>E</b>
Boomers (E)	22	30	20	21
Less than University (F)	20	30	22	21
University+ (G)	38 <b>F</b>	52 <b>F</b>	30 <b>F</b>	34 <b>F</b>
\$39,999 or less (H)	20	32	20	22
\$40,000-\$99,999 (I)	28	41 <b>H</b>	28	26
\$100,000 or more (J)	33 <b>H</b>	40	26	34 <b>H</b>
Atlantic (K)	23	36	22	28
British Columbia (L)	23	35	25	30 <b>O</b>
Quebec (M)	24	41	30	30 <b>O</b>
Ontario (N)	30	37	24	25
Prairies (O)	24	39	22	17

Source: 2017 Edelman Trust Barometer. Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, Canada.

\*Only Trust in Government Officials is Stat Tested

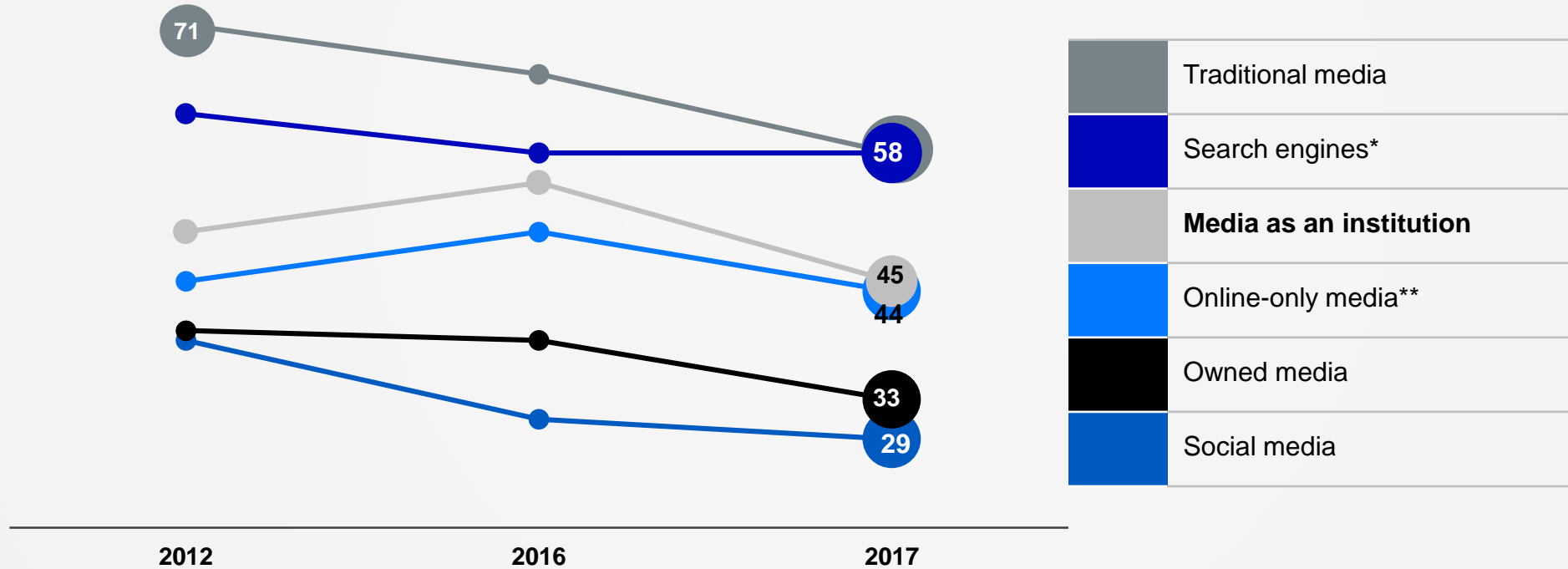


# TRUST IN MEDIA



# Trust in Media: Traditional erodes, search steadily climbs.

Per cent trust in each source for general news and information



Source: 2017 Edelman Trust Barometer. Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust) General Population, Canada, question asked of half the sample

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

\*\*From 2012-2015, “Hybrid Media” was included as a media type. In 2016, this was changed to “Online-Only media.”



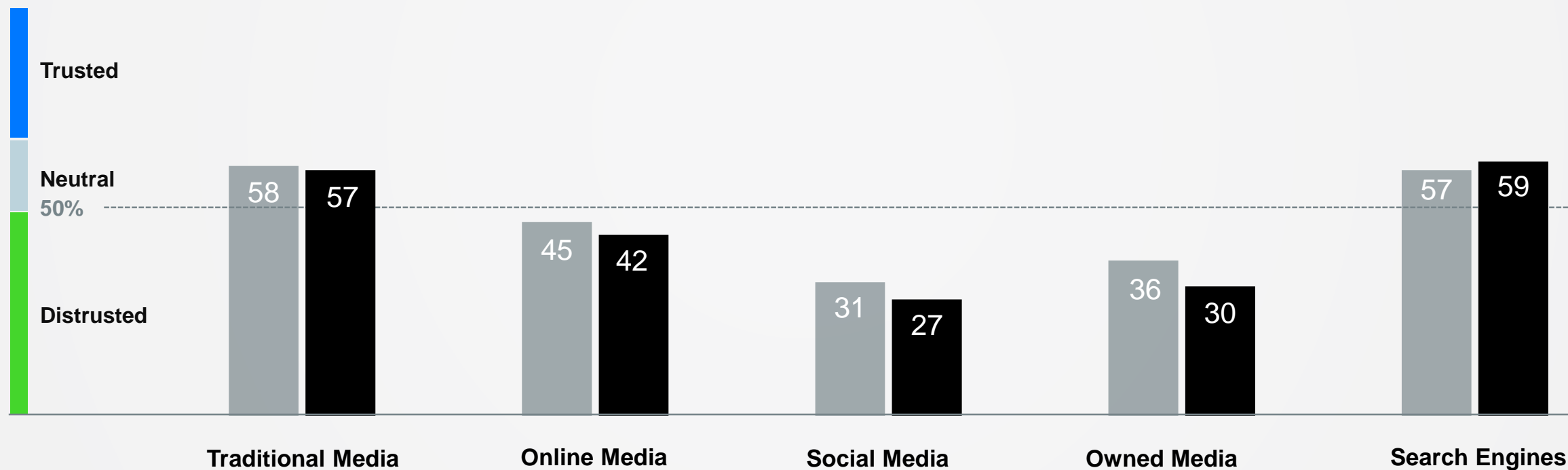




# Traditional media and search engines tend to be more trusted among both men and women.

Per cent trust in the general news and information, by gender

Male **A** Female **B**

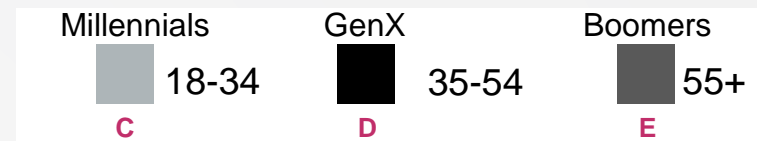


Source: 2017 Edelman Trust Barometer. Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. (Top 4 Box, Trust), question asked of half of the sample. General Population, Canada by gender.

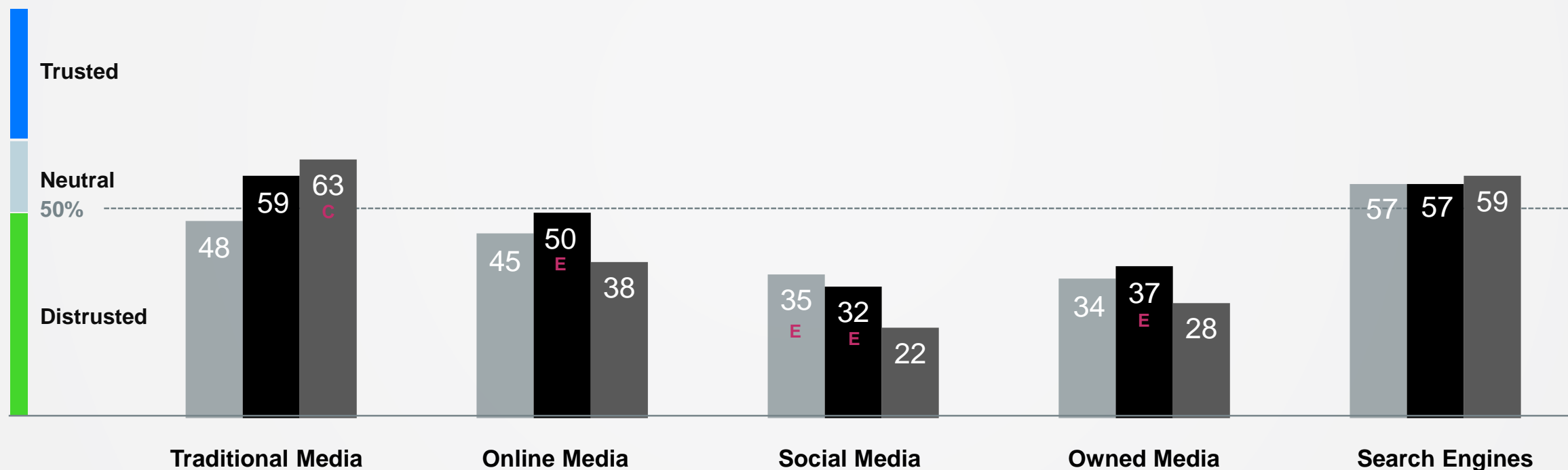




# Boomers tend to be more trusting of traditional media.



Per cent trust in general news and information, by age



Source: 2017 Edelman Trust Barometer. Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. (Top 4 Box, Trust), question asked of half of the sample. General Population, Canada by age.



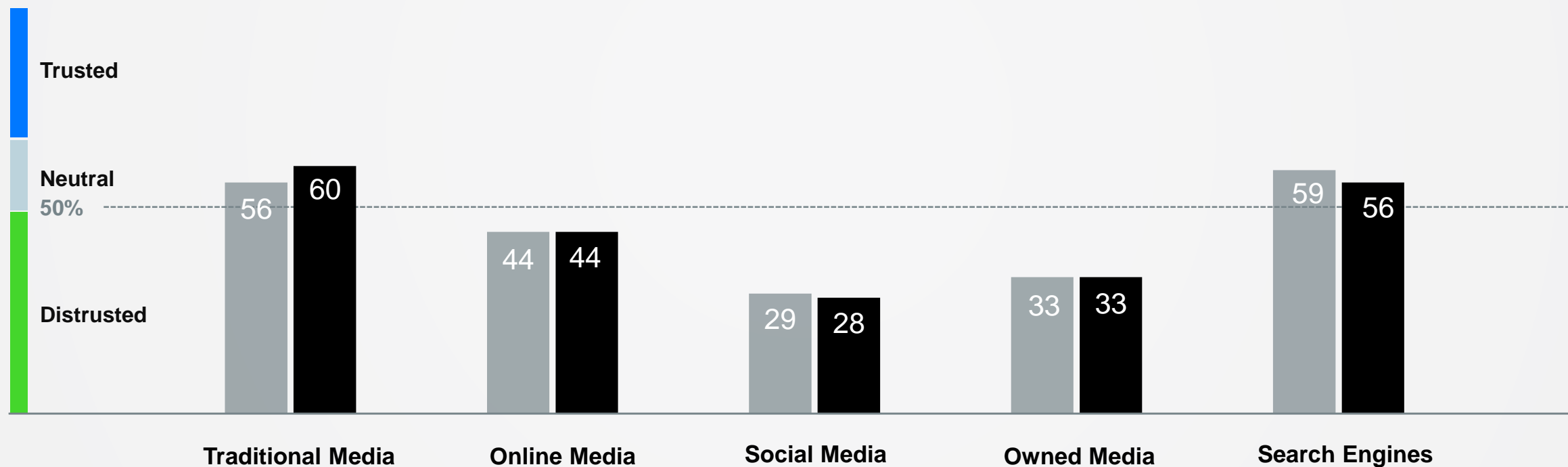


# There are no large skews between university educated and less than university educated.

Per cent trust general news and information, by education

Less Than University  
F

University+  
G

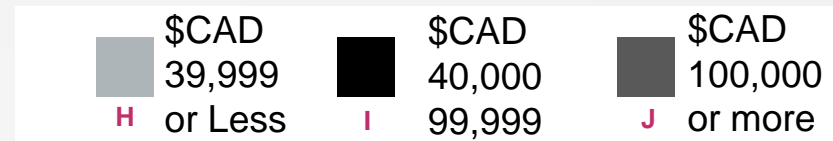


Source: 2017 Edelman Trust Barometer. Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. (Top 4 Box, Trust), question asked of half of the sample. General Population, Canada by education.

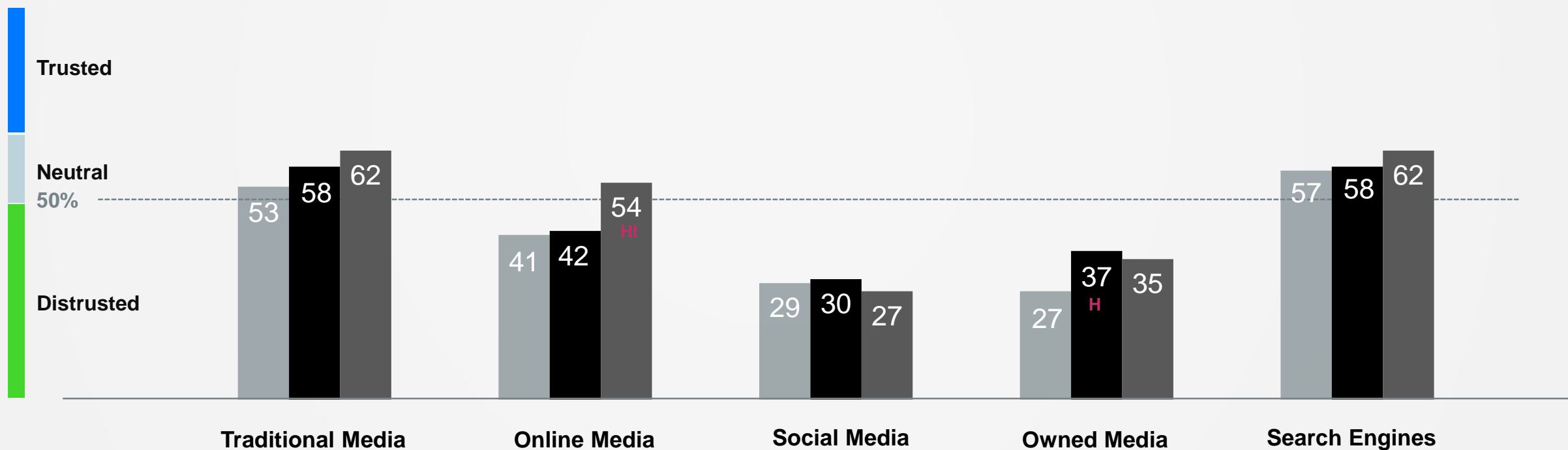




# Higher income Canadians tend to turn to online media more than their counterparts.



Per cent trust general news and information, by income



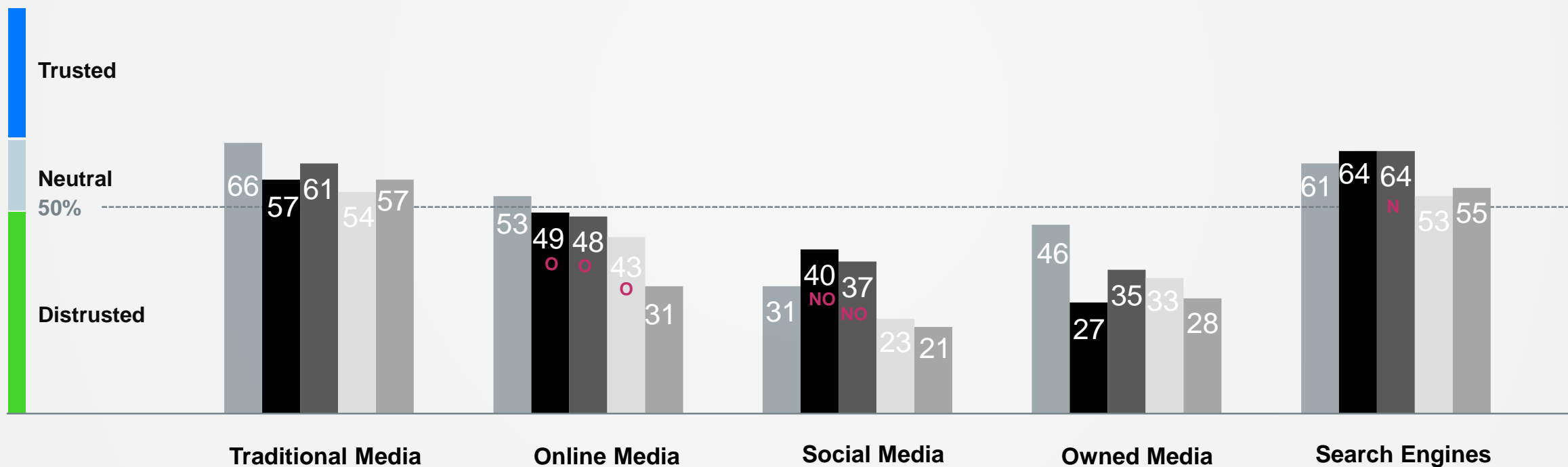
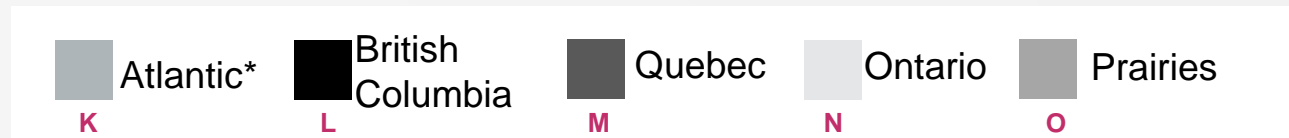
Source: 2017 Edelman Trust Barometer. Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. (Top 4 Box, Trust), question asked of half of the sample. General Population, Canada by income.





# British Columbia and Quebec tend to use social media more than other provinces.

Per cent trust general news and information, by region



Source: 2017 Edelman Trust Barometer. Q178-182. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. (Top 4 Box, Trust), question asked of half of the sample. General Population, Canada by region.

\*Please note lower than recommended sample size (n=82), findings are directional in nature.



# Overview of Trust in Media

Per cent trust in media, by demographics

	Traditional Media	Online Media	Social Media	Owned Media	Search Engines
Male (A)	58	45	31	36	57
Female (B)	57	42	27	30	59
Millennials (C)	48	45	35 E	34	57
GenX (D)	59	50 E	32 E	37 E	57
Boomers (E)	63 C	38	22	28	59
Less than University (F)	56	44	29	33	59
University+ (G)	60	44	28	33	56
\$39,999 or less (H)	53	41	29	27	57
\$40,000-\$99,999 (I)	58	42	30	37 H	58
\$100,000 or more (J)	62	54 HI	27	35	62
Atlantic (K)	66	53	31	46	61
British Columbia (L)	57	49 O	40 NO	27	64
Quebec (M)	61	48 O	37 NO	35	64 N
Ontario (N)	54	43 O	23	33	53
Prairies (O)	57	31	21	28	55

Source: 2017 Edelman Trust Barometer. Q11-620. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) General Population, Canada.



# AUDIENCE SNAPSHOT



# A Look at Millennial Sentiment

