2019 EDELMAN TRUST BAROMETER

Canada

#TrustBarometer

Edelman trustbarometer 2019 | ANNUAL GLOBAL STUDY

Edelman

19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

1,500 respondents in Canada

+/-2.53 margin of error for general population in Canada

All fieldwork was conducted between October 19 and November 16, 2018

27-market global data margin of error: General population +/- 0.6% (N=31,050), informed public +/- 1.3% (N=6,000), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8 (N=15,525).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N=min 200, varies by market, China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N =min 739, varies by market).

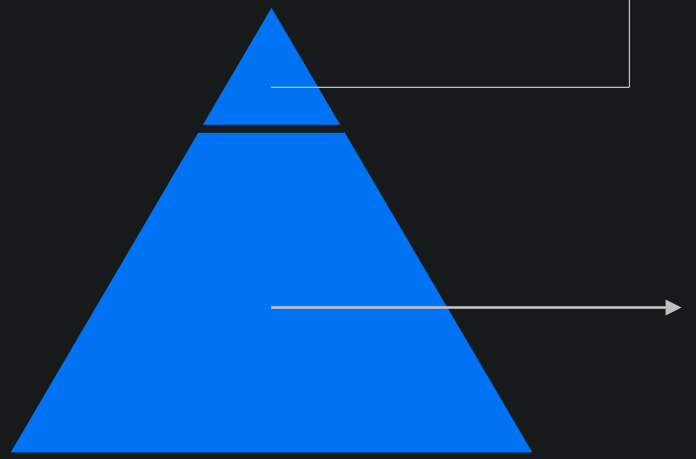
Employee MOE: 27-market = +/- 0.8% (N=16,944)
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

General Online Population

1,150 respondents per market

Ages 18+

All slides show general online population data unless otherwise noted



Informed Public

500 respondents in U.S. and China; 200 in all other markets

Represents 16% of total global population

Must meet 4 criteria

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

Mass Population

All population not including informed public

Represents 84% of total global population

2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed)

Oversample of employees of multinational companies: 500 respondents per market

TRUST IN RETROSPECT

2001
Rising Influence of NGOs

2002
Fall of the Celebrity CEO

2003
Earned Media More Credible Than Advertising

2004
U.S. Companies in Europe Suffer Trust Discount

2005
Trust Shifts from "Authorities" to Peers

2006
A "Person Like Me" Emerges as Credible Spokesperson

2007
Business More Trusted Than Government and Media

2008
Young Influencers Have More Trust in Business

2009
Business Must Partner with Government to Regain Trust

2010
Trust is Now an Essential Line of Business

2011
Rise of Authority Figures

2012
Fall of Government

2013
Crisis of Leadership

2014
Business to Lead the Debate for Change

2015
Trust is Essential to Innovation

2016
Growing Inequality of Trust

2017
Trust in Crisis

2018
The Battle for Truth

2019
Trust at Work

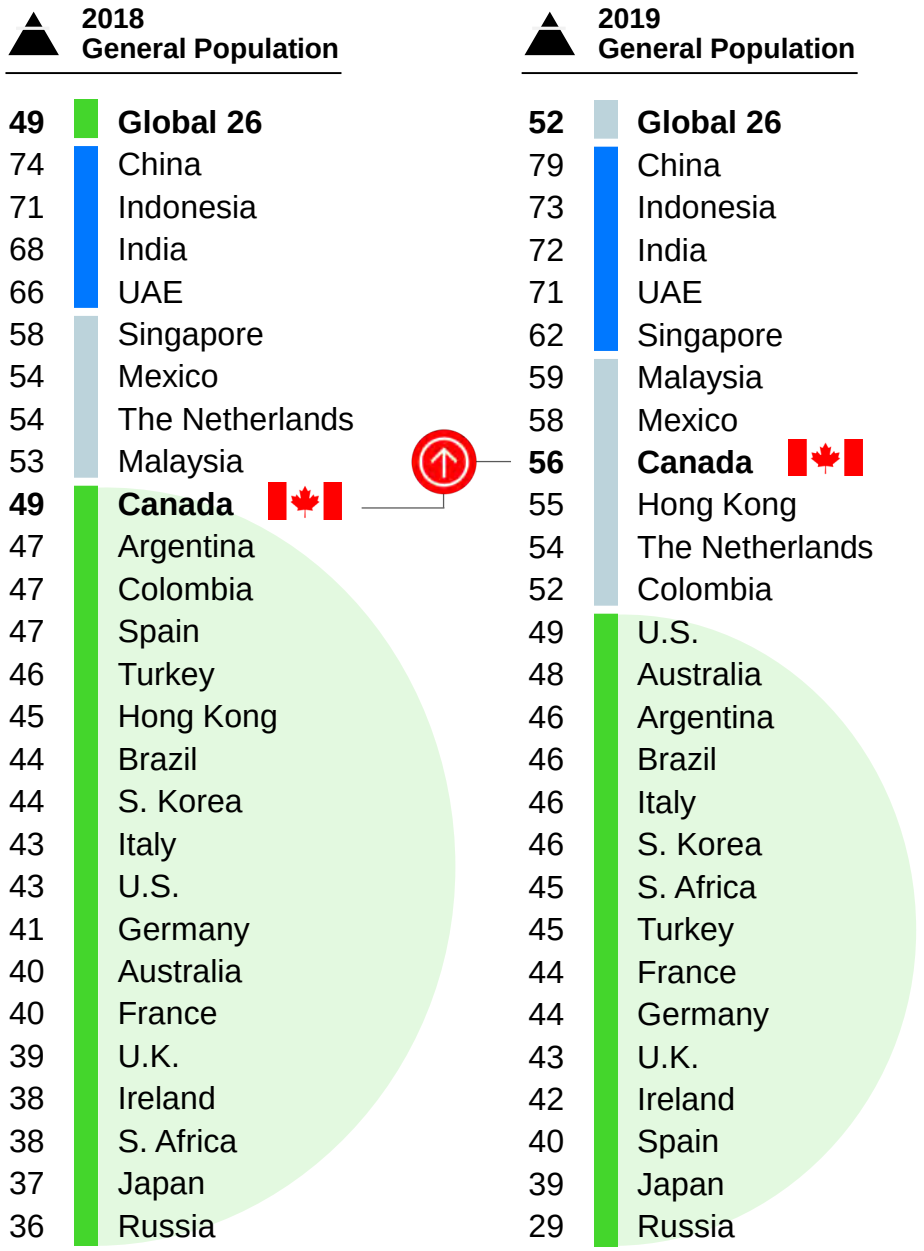
GLOBAL DISTRUST CONTINUES

Trust Index

Global Trust Index increases 3 pts to neutral

15 of 26 markets are distrusters, down 3 from 2018

2019 Edelman Trust Barometer. The Trust Index is the average per cent 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 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." 9-point scale; top 4 box, trust. General population, 26-market global average.



Trust (60-100)

Neutral (50-59)

Distrust (1-49)

Biggest changes in

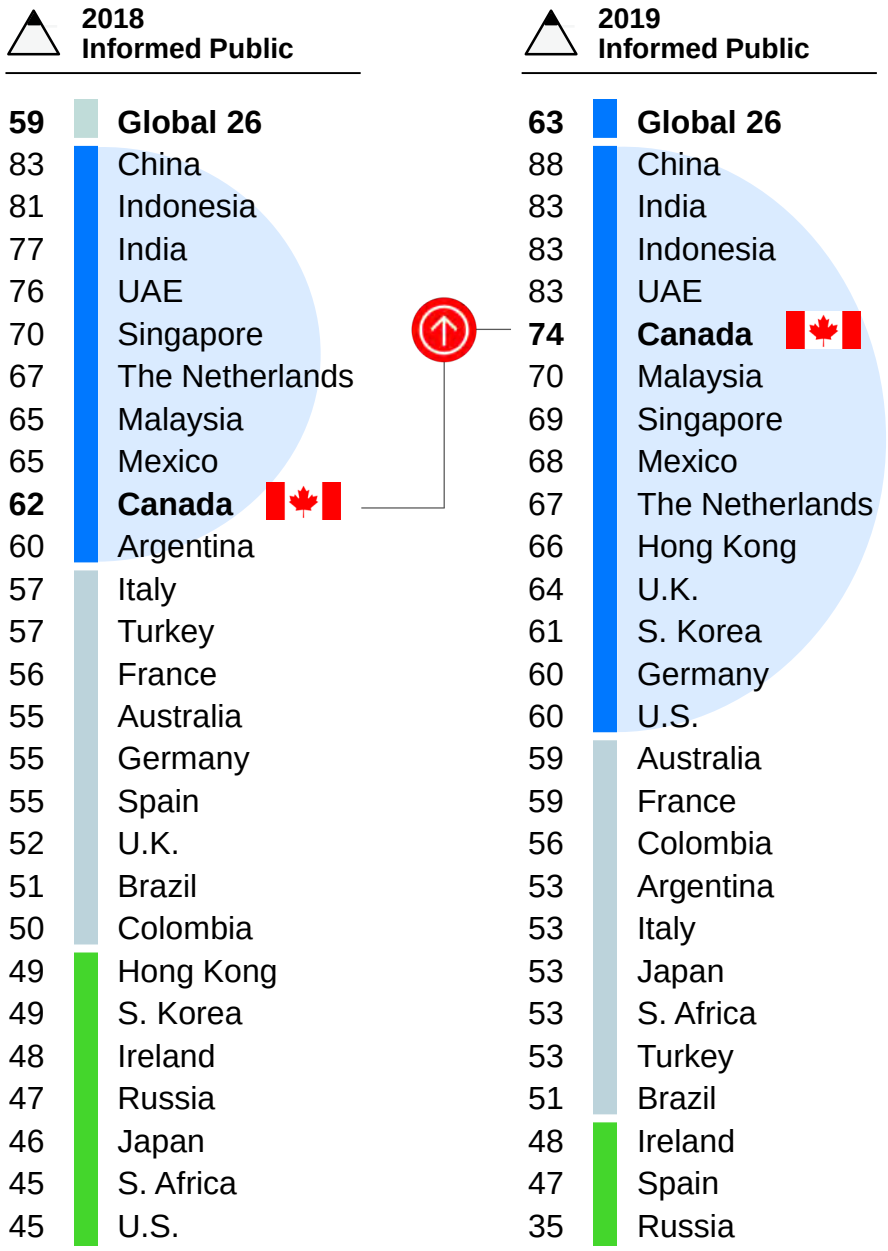
Hong Kong	**+10**
Australia	**+8**
Canada	**+7**
S. Africa	**+7**
Russia	**-7**
Spain	**-7**

TRUST RISES FOR INFORMED PUBLIC

Trust Index

A 4-point increase in the global Trust Index

2019 Edelman Trust Barometer. The Trust Index is the average per cent 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 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." 9-point scale; top 4 box, trust. Informed public, 26-market global average.

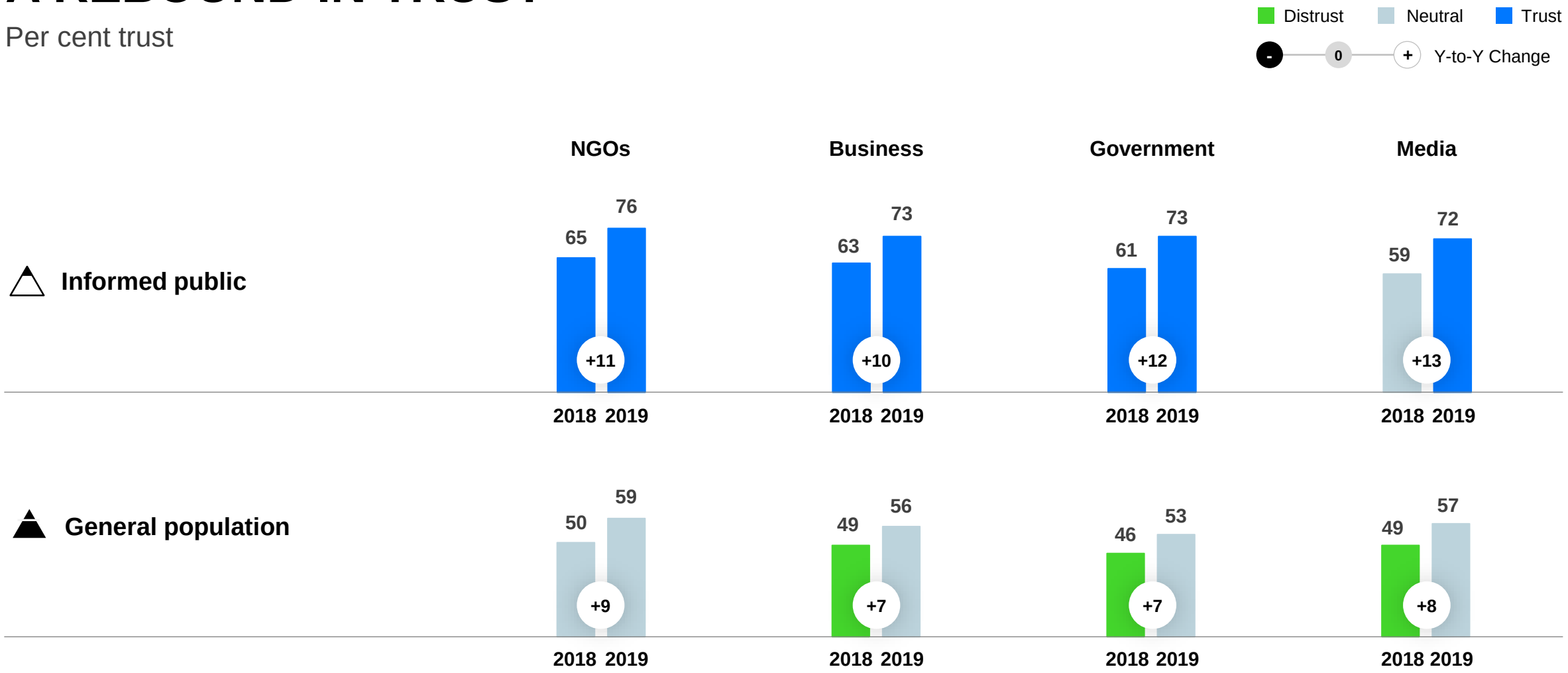


Biggest changes in

Hong Kong	**+17**
U.S.	**+15**
Canada	**+12**
U.K.	**+12**
Russia	**-12**

A REBOUND IN TRUST

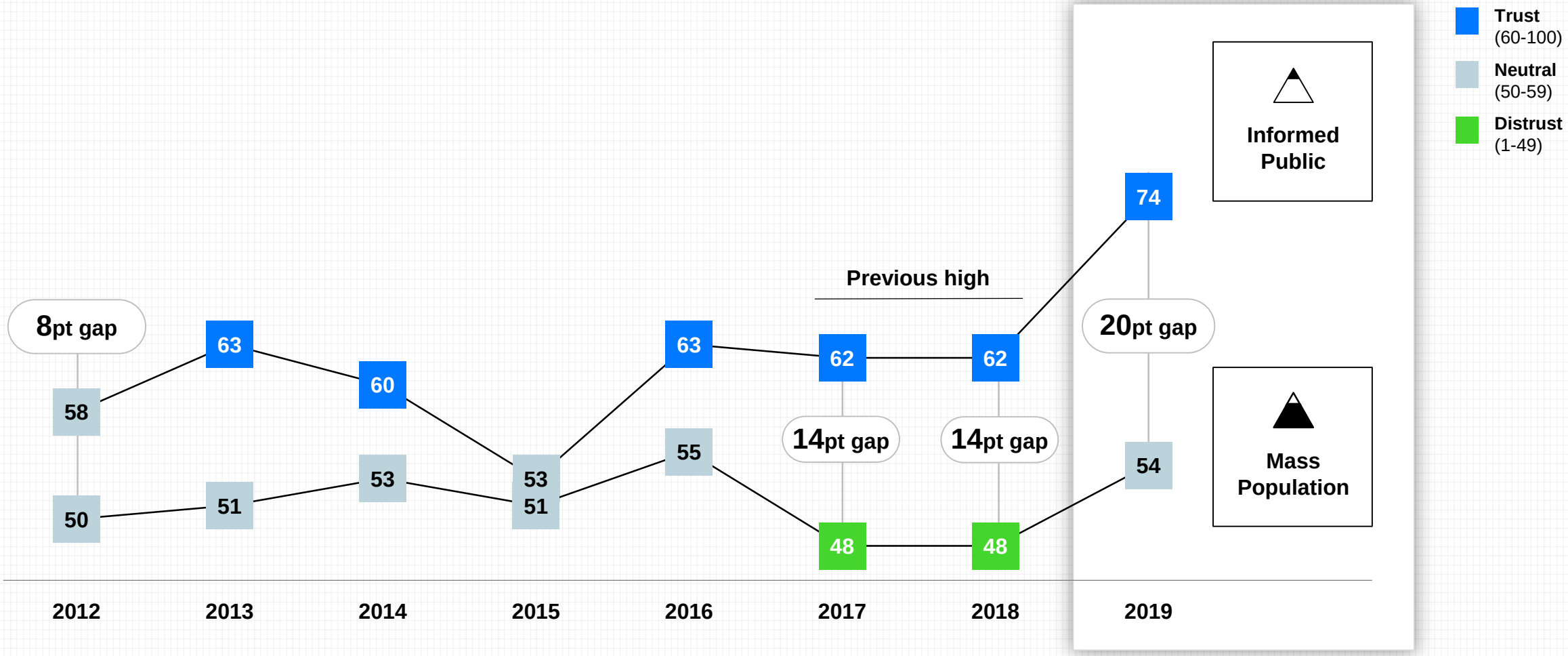
Per cent trust



2019 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 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." 9-point scale; top 4 box, trust. Informed public and general population, Canada.

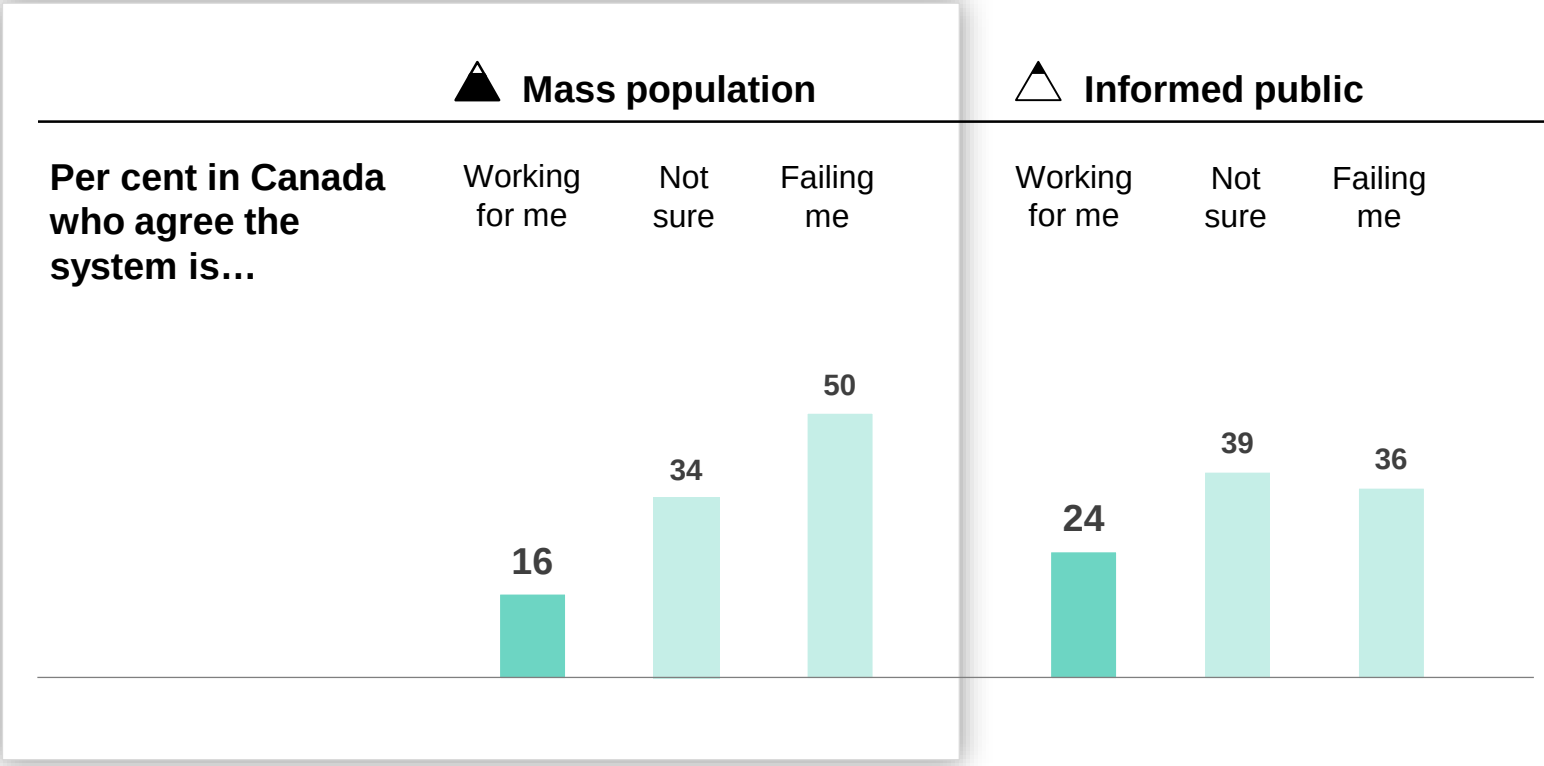
TRUST INEQUALITY AT RECORD HIGH IN CANADA

Trust Index, Canada



2019 Edelman Trust Barometer. The Trust Index is the average per cent 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 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." 9-point scale; top 4 box, trust. Informed public and mass population, Canada.

MASS POPULATION BELIEVES THE SYSTEM IS FAILING THEM



How true is this for you?	▲	△
Sense of injustice	**74**	**73**
Desire for change	**65**	**79**
Lack of confidence	**63**	**66**
Lack of hope	**23**	**15**

2019 Edelman Trust Barometer. "System failing" measure. For full details on how the "system failing" measure was calculated, please refer to the Technical Appendix. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. Informed public and mass population, Canada. Sense of injustice is an average of POP_MDC/1,2,3,8; Desire for change is POP_MDC/9; Lack of confidence is POP_MDC/10; Lack of hope is an average of POP_MDC/18,19,20 [reverse scored].

FEARS ABOUT JOB SECURITY

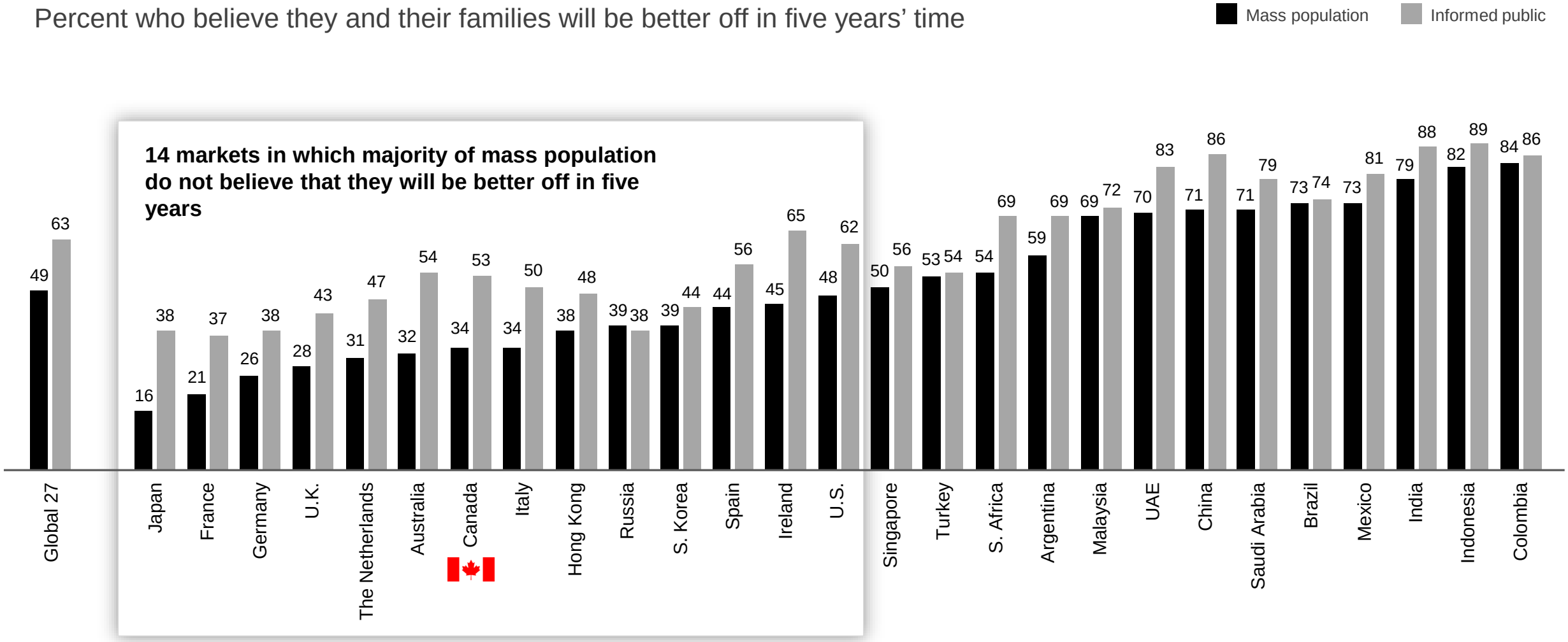
Per cent of Canadian employees who worry about job impacts due to each issue

	Not having the **training** and skills necessary to get a good paying job	**Automation** and/or other innovations taking your job away	International conflicts about **trade policies** and **tariffs** hurting the company you work for
All employees	**53%**	**52%**	**53%**
Multinational employees	**57%**	**57%**	**64%**

2019 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? 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". 9-point scale; top 4 box, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, Canada.

CANADA SHARES DEVELOPED WORLD'S PESSIMISM TOWARDS FUTURE

Percent who believe they and their families will be better off in five years' time

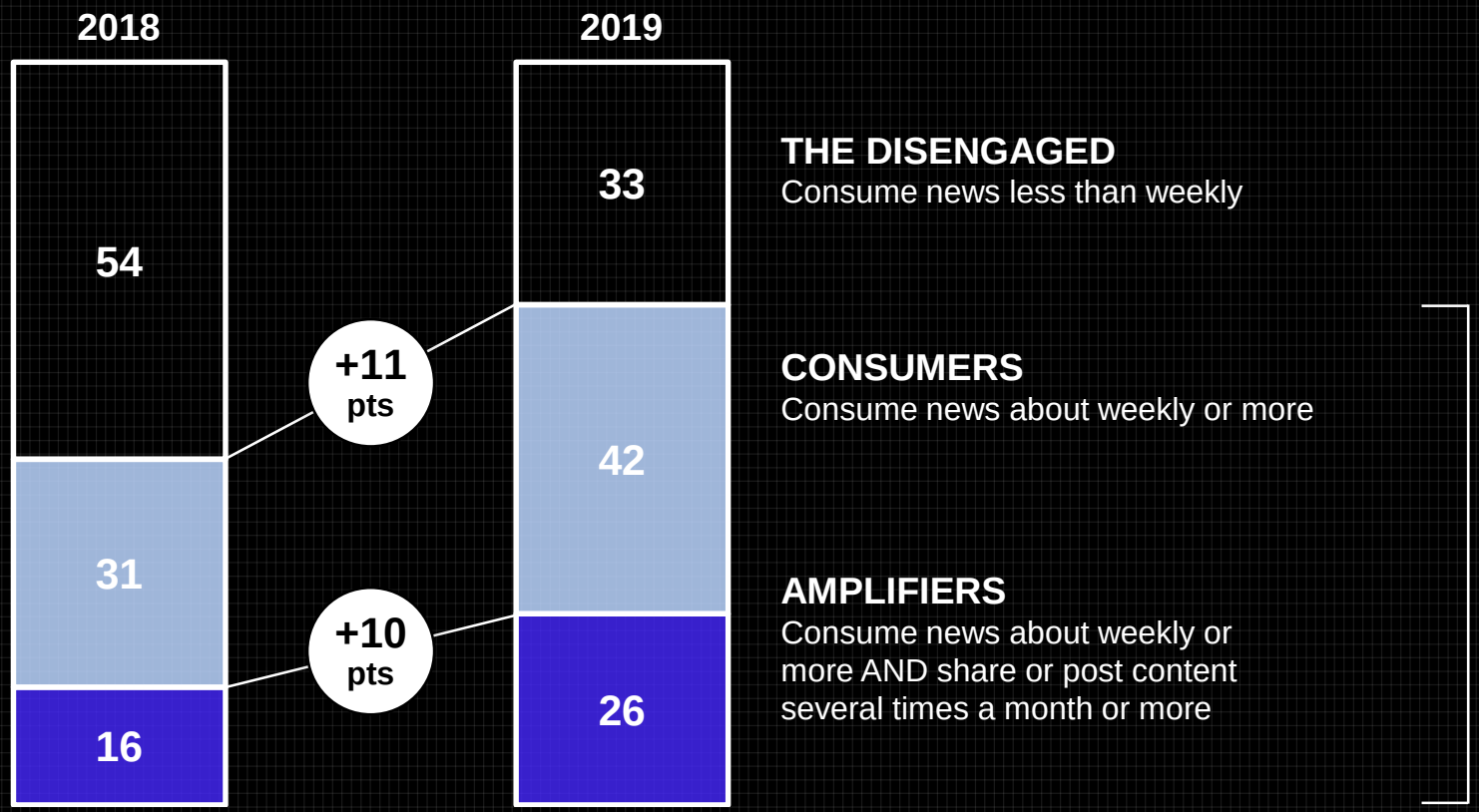


2019 Edelman Trust Barometer. CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. Informed public and mass population, 27-market average.

Seeking Answers

CANADIANS ARE SEEKING ANSWERS

How often do you engage in the following activities related to news and information?



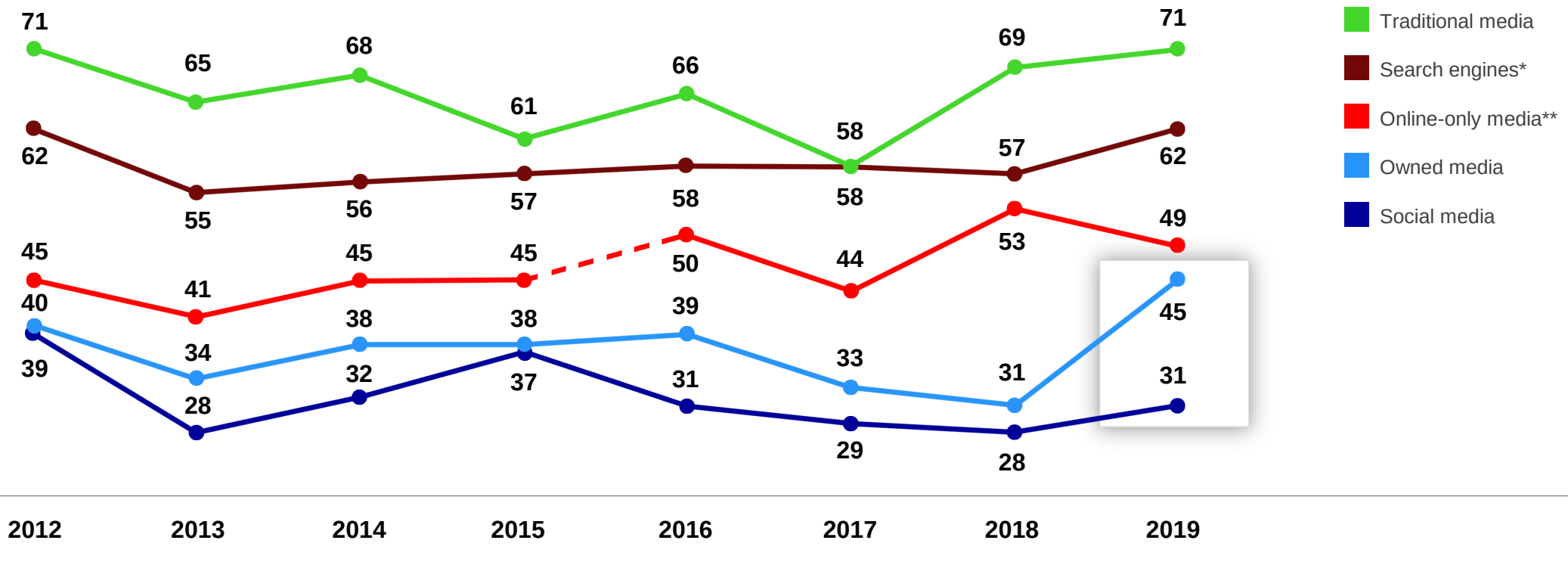
+21pts

More engaged with the news

2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. General population, Canada. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

TRADITIONAL MEDIA MOST TRUSTED IN CANADA

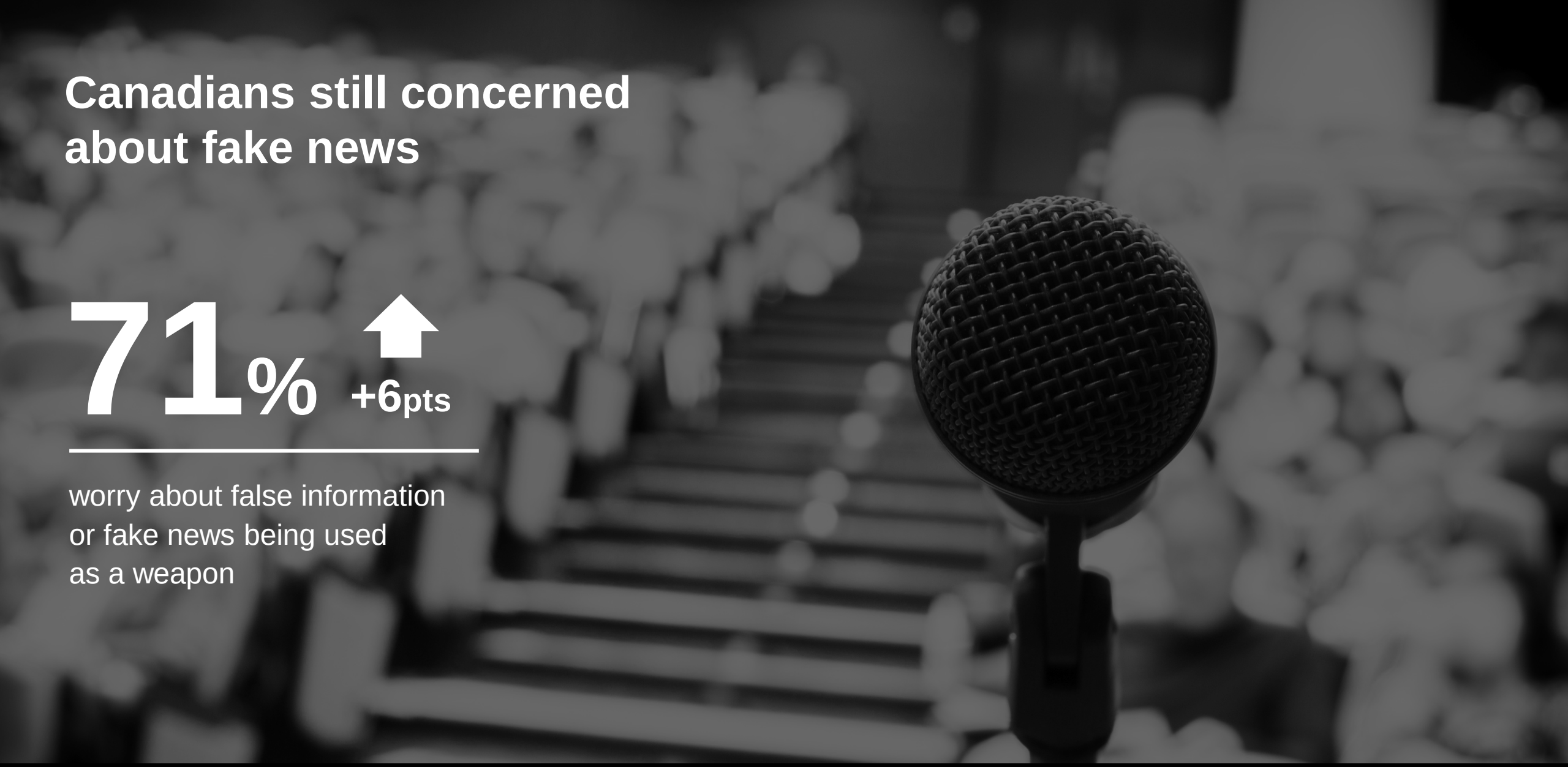
Per cent trust in each source for general news and information



2019 Edelman Trust Barometer. COM_MCL. 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." 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Canada.

*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."

Canadians still concerned about fake news



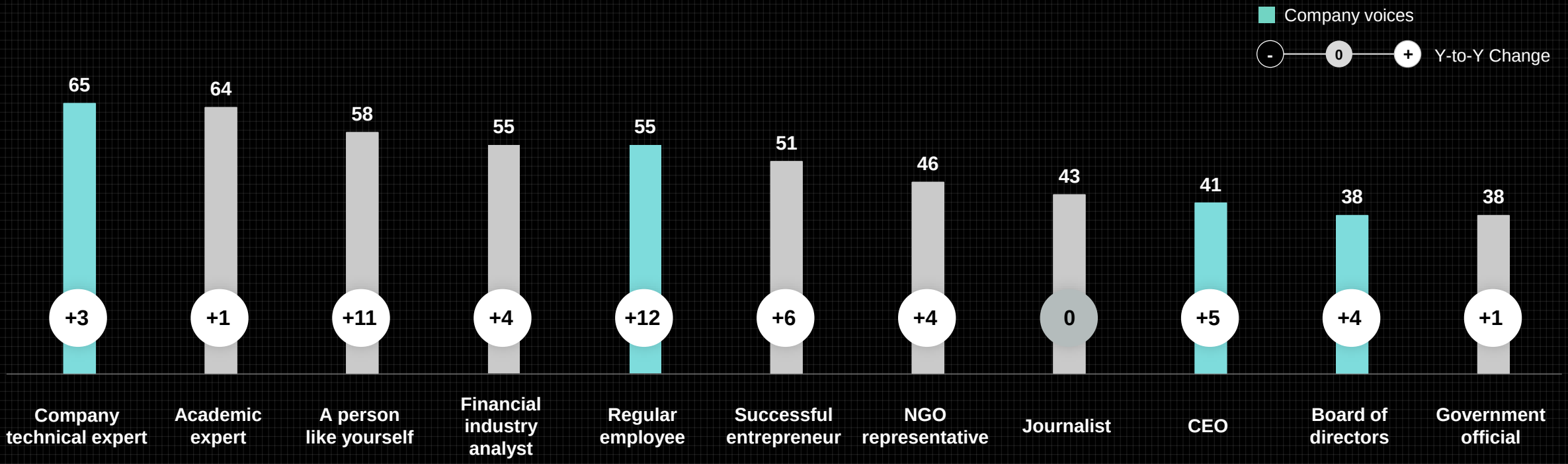
71% ↑ **+6pts**

worry about false information or fake news being used as a weapon

2019 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means “strongly disagree” and nine means “strongly agree”. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Canada.

EXPERTS MOST CREDIBLE SPOKESPEOPLE

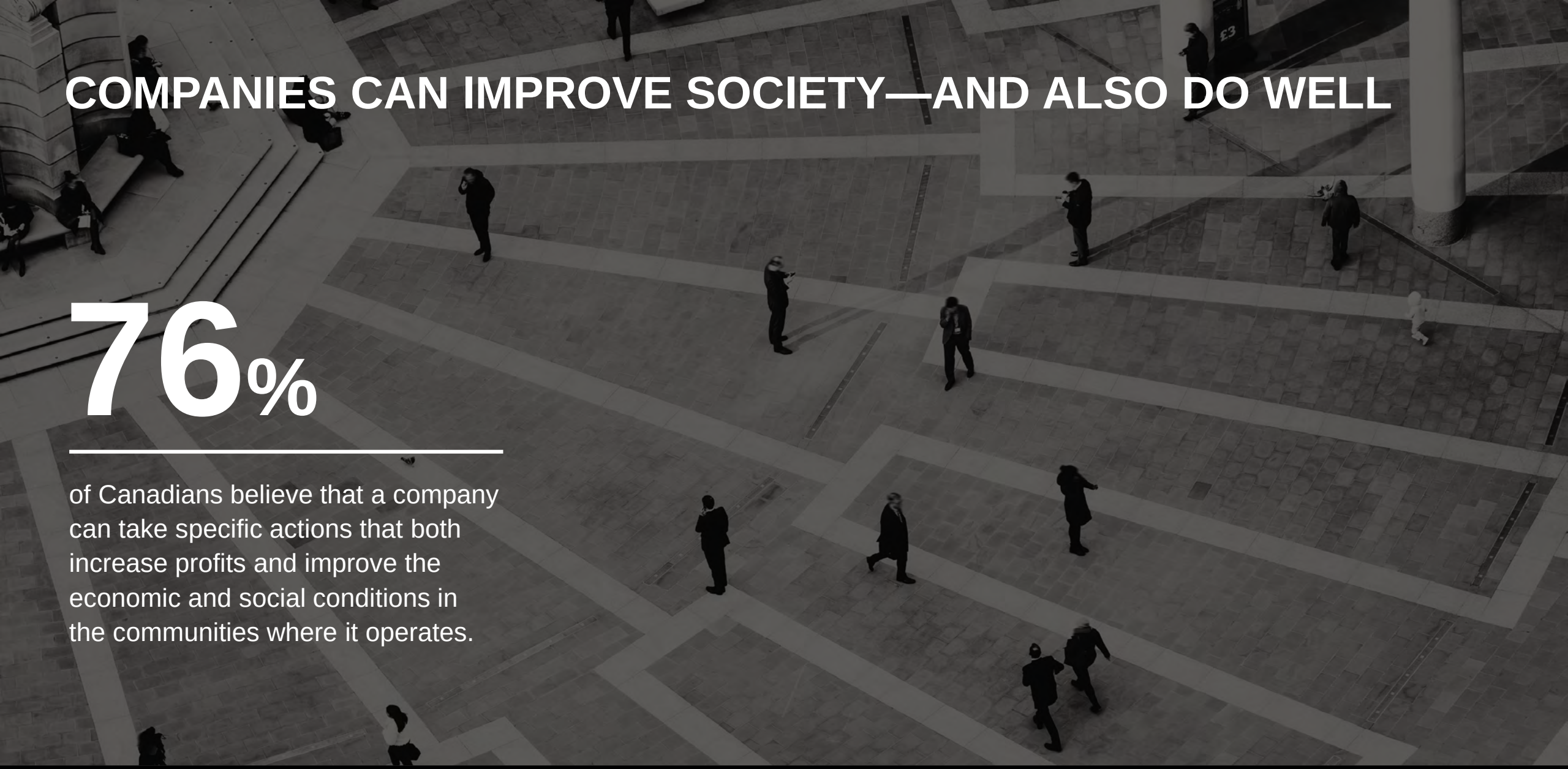
Per cent who rate each spokesperson as very/extremely credible,
and change from 2018 to 2019, in Canada



2019 Edelman Trust Barometer. CRE_PPL. 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. 4-point scale; top 2 box, credible. Question asked of half of the sample. General population, Canada.

Evolving Expectations of Business and Leaders

COMPANIES CAN IMPROVE SOCIETY—AND ALSO DO WELL



76%

of Canadians believe that a company can take specific actions that both increase profits and improve the economic and social conditions in the communities where it operates.

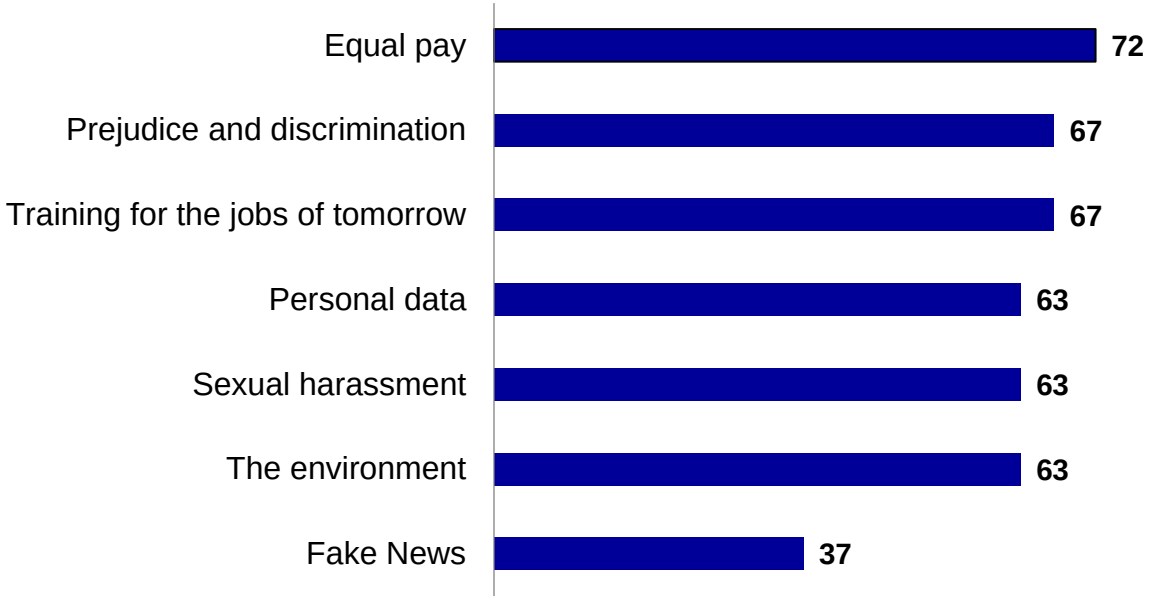
2019 Edelman Trust Barometer. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree.
Question asked of half the sample. General population, Canada.

HIGH EXPECTATIONS OF CEOs

Per cent in Canada who say that CEOs should take the lead on change rather than waiting for government to impose it

79% **+11pts**

Per cent in Canada who agree CEOs can create positive change in:



2019 Edelman Trust Barometer. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? 9-point scale; top 4 box, agree. Question asked of half of the sample. CEO_SIG. In which of the following areas do you think CEOs can have significant impact or create the most positive change? Question asked of half of the sample. General population, Canada.

EXPECTATIONS EXTEND TO EMPLOYERS

67%

of Canadian employees agree
It's critically important for my CEO to respond to challenging times

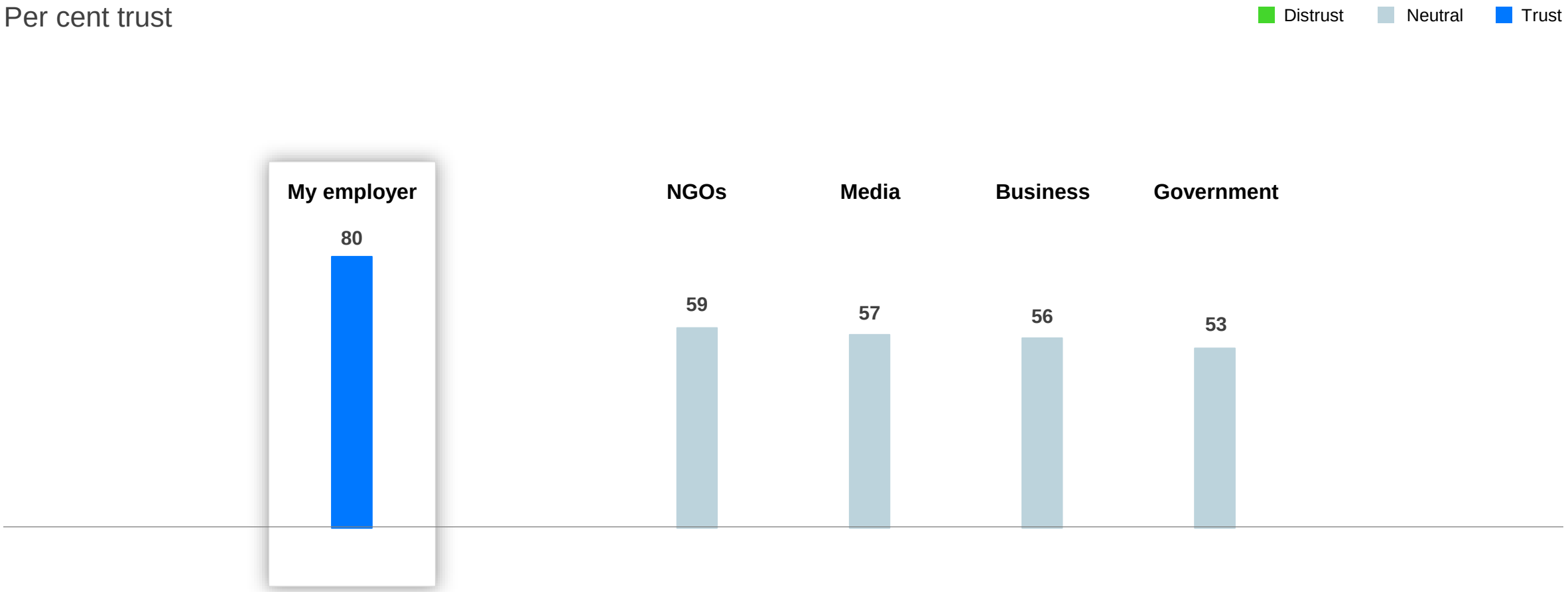
- Industry issues
- Political events
- National crisis
- Employee-driven issues

2019 Edelman Trust Barometer. CEO_DIR. On which of the following occasions do you believe it is critically important to hear directly from the CEO or head of the organization you work for? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Canada.

Data shown is a net of "when there is major news or an event that affects our industry or sector," "when there is a major social or political event that affects our country," "when there is a crisis in the country," and "when employees demand that the CEO publicly take a stand on an important issue".

EMPLOYERS REMAIN A HAVEN FOR TRUST

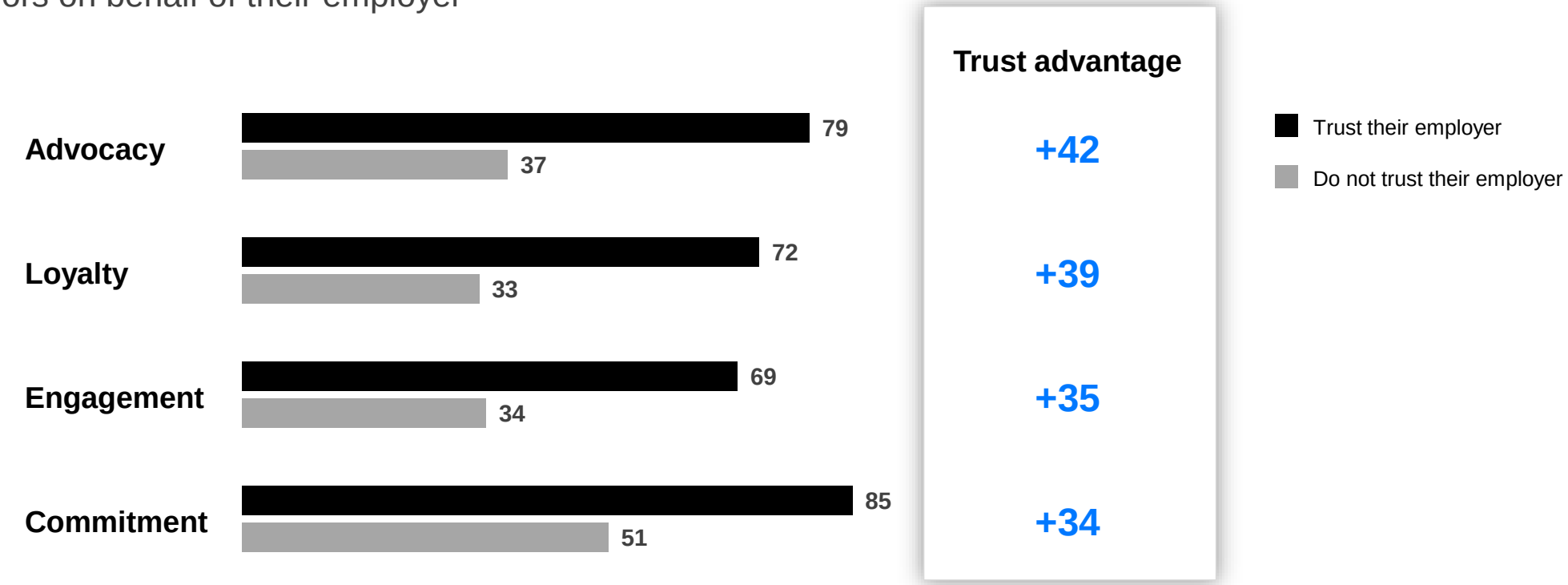
Per cent trust



2019 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 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." 9-point scale; top 4 box, trust. "Your employer" asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population, Canada.

TRUST ADVANTAGE SUPPORTS EMPLOYER RESILIENCE

Per cent of Canadian employees who engage in these types of behaviors on behalf of their employer



2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Canada, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99). TRU_INS. [YOUR EMPLOYER] 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". Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Canada. Advocacy is an average of (EMP_ENG/3-5); Loyalty is an average of (EMP_ENG/1-2); Engagement is an average of (EMP_ENG/10-15); Commitment is an average of (EMP_ENG/6-9). See the tech appendix for a complete list of the items that went into each employee KPI dimension.

EMPLOYERS AS A TRUSTED GUIDE

Per cent who agree

I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**

2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree.
Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, Canada

EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

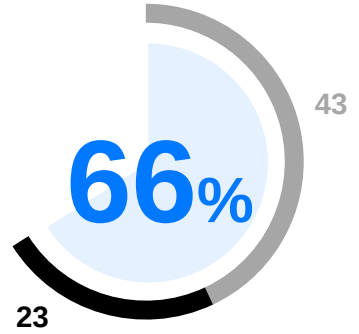
Per cent of Canadian employees who expect each from a prospective employer

Strong expectation
You would have to **pay me a lot more** to work for an organization that does not offer this

Deal breaker
I would **never** work for an organization that does not offer this

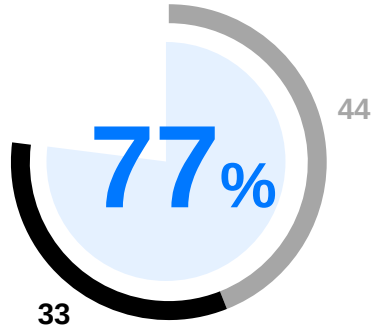
Shared Action

My employer has a greater purpose, and my work has a meaningful societal impact



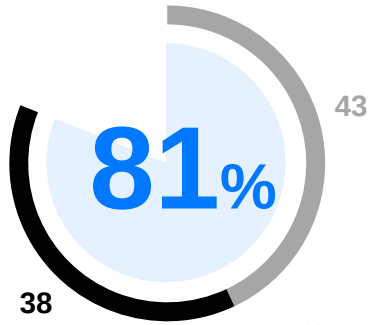
Personal Empowerment

I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



Job Opportunity

My employer offers wage growth, training, career growth and work which I find interesting & fulfilling



2019 Edelman Trust Barometer. EMP_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Canada. Buckets are the sum of the average of codes 1 & 2 for the items that make up each dimension. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.

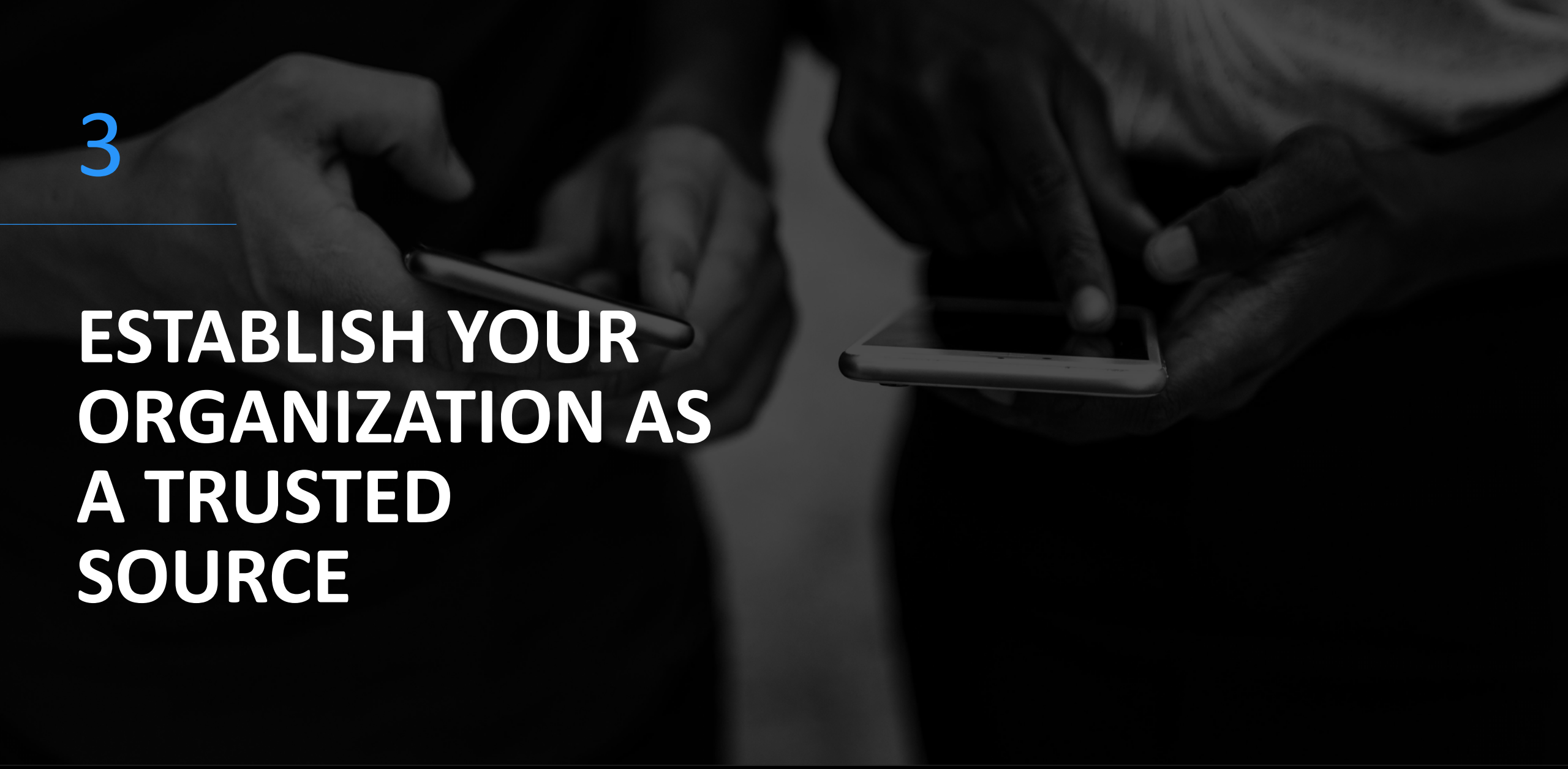
Key takeaways

1

LEAD WITH PURPOSE

2

ENGAGE ON ISSUES THAT MATTER MOST TO CANADIANS



3

ESTABLISH YOUR ORGANIZATION AS A TRUSTED SOURCE

4

ACTIVATE THE EMPLOYEE-EMPLOYER RELATIONSHIP