

Trust in Canada

Edelman Trust Barometer 2020



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www.edelman.ca/trust-barometer/trust-barometer-2020



20TH ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online survey in 28 markets

34,000+ respondents total

All fieldwork was conducted between
October 19 and November 18, 2019

28-market 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+), half-sample global general online population +/- 0.8% (N=16,100).

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 736, varies by market).

Gen Z MOE: 28-market = +/- 1.5% (N=4,310)

Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market).

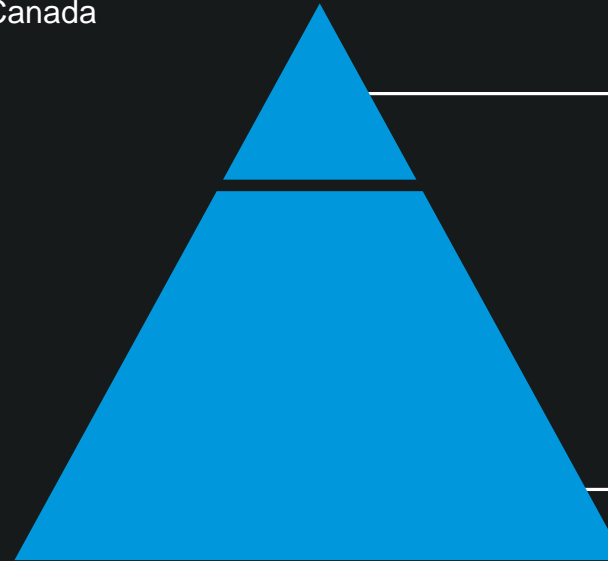
General Online Population

1,150
respondents
per market;

Ages
18+

All slides show general
online population data
unless otherwise noted

1,500
in Canada



2020 Gen Z oversample

250 respondents age 18-24 per market

Informed Public

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

Represents **17%** 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 **83%** of total
global population

TRUST ESSENTIAL FOR FUTURE SUCCESS

20 years of Edelman research on trust

- 2M+ respondents
- 400+ companies
- 80k employee reviews
- Interviews with 50+ business leaders
- 23M measures of trust
- Review of 150+ academic articles and 80+ models of trust
- Trust and stock price analysis for 80 companies

TRUST MATTERS TO...



20 YEARS OF TRUST

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
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 People Have More Trust in Business	Trust in Business Plummet	Performance and Transparency Essential to Trust
2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Business Must Partner With Government to Regain Trust	Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	The Battle for Truth	Trust at Work	Trust: Competence and Ethics

CONTINUED DISTRUST

Trust Index

Global Trust Index increases 1 pt., with increases in 16 of 26 markets measured

12 of 26 markets are distrusters, down 2 from 2019

2020 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. 9-point scale; top 4 box, trust. General population, 26-mkt avg.

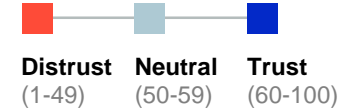
▲ 2019 General population

53	Global 26
79	China
73	Indonesia
72	India
71	UAE
70	Saudi Arabia
62	Singapore
59	Malaysia
58	Mexico
56	Canada 🇨🇦
55	Hong Kong
54	The Netherlands
52	Colombia
49	U.S.
48	Australia
46	Argentina
46	Brazil
46	Italy
46	S. Korea
45	S. Africa
44	France
44	Germany
43	U.K.
42	Ireland
40	Spain
39	Japan
29	Russia



▲ 2020 General population

54	Global 26
82	China
79	India
73	Indonesia
65	UAE
62	Mexico
62	Singapore
61	Saudi Arabia
60	Malaysia
57	The Netherlands
53	Canada 🇨🇦
53	Colombia
51	Brazil
50	Hong Kong
50	S. Korea
49	Argentina
49	Italy
47	Australia
47	U.S.
46	Germany
45	France
45	Ireland
45	Spain
44	S. Africa
42	Japan
42	U.K.
30	Russia



Declines in


Saudi Arabia	-9
UAE	-6
Hong Kong	-5
Canada	-3
U.S.	-2
Australia	-1
S. Africa	-1
U.K.	-1

TRUST RISES FOR INFORMED PUBLIC, BUT DROPS IN CANADA


Trust Index

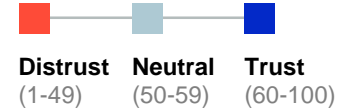
2020 Edelman Trust Barometer. The Trust Index is the average per cent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public, 26-mkt avg.

2019 Informed Public

64	Global 26
88	China
84	Saudi Arabia
83	India
83	Indonesia
83	UAE
74	Canada 
70	Malaysia
69	Singapore
68	Mexico
67	The Netherlands
66	Hong Kong
64	U.K.
61	S. Korea
60	Germany
60	U.S.
59	Australia
59	France
56	Colombia
53	Argentina
53	Italy
53	Japan
53	S. Africa
51	Brazil
48	Ireland
47	Spain
35	Russia

2020 Informed public

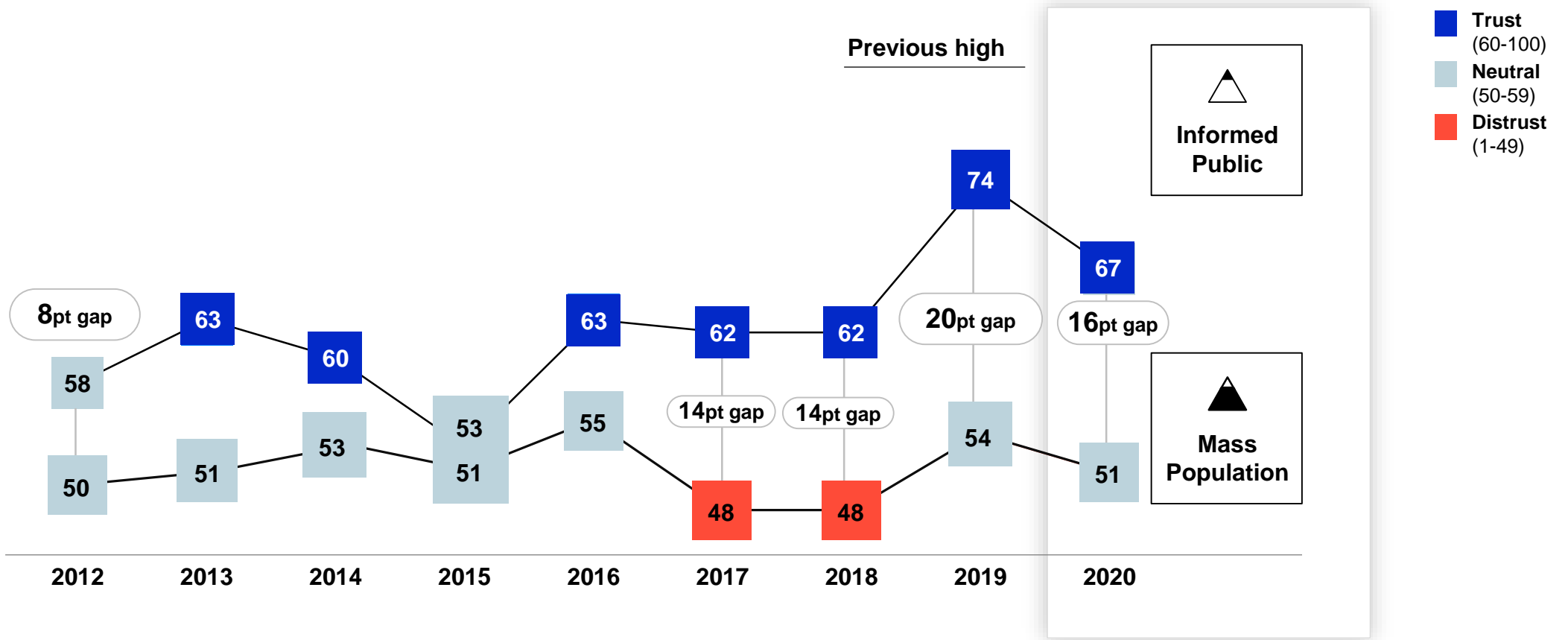
65	Global 26
90	China
87	India
82	Indonesia
80	Saudi Arabia
75	UAE
71	Mexico
71	Singapore
68	Australia
68	Malaysia
67	Canada 
67	The Netherlands
64	Germany
64	Italy
63	France
62	Colombia
60	Argentina
60	Brazil
60	Ireland
59	Spain
57	U.K.
54	Hong Kong
53	Japan
53	U.S.
50	S. Korea
49	S. Africa
41	Russia



-7

TRUST INEQUALITY PERSISTS 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.

TWO DIFFERENT TRUST REALITIES

Per cent trust in Canada



Informed public

All four institutions trusted

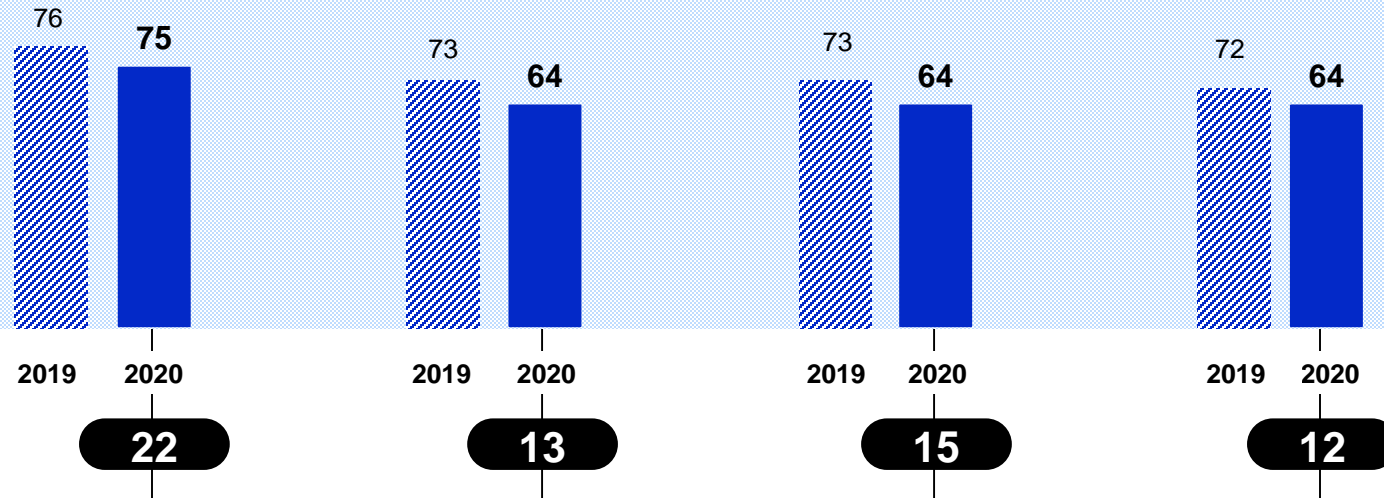
Trust gap,
informed public vs.
mass population

NGOs

Business

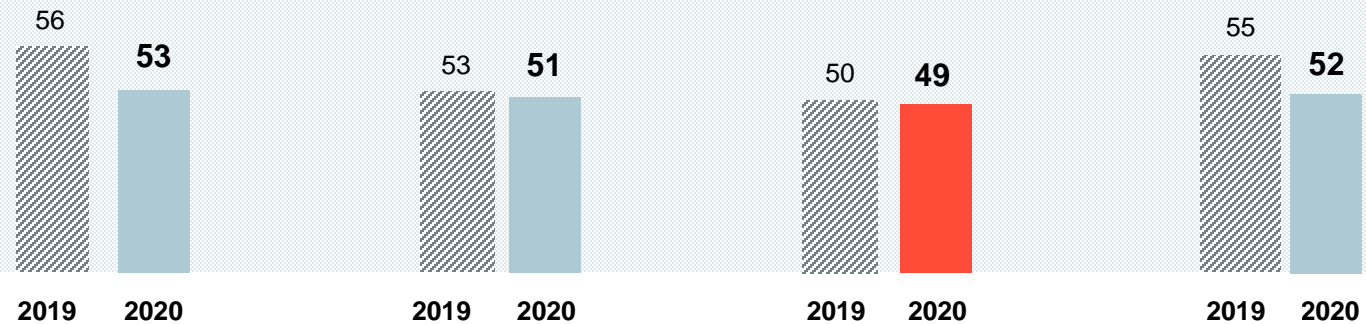
Government

Media



Mass population

No institutions trusted



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. Informed public and mass population, Canada.

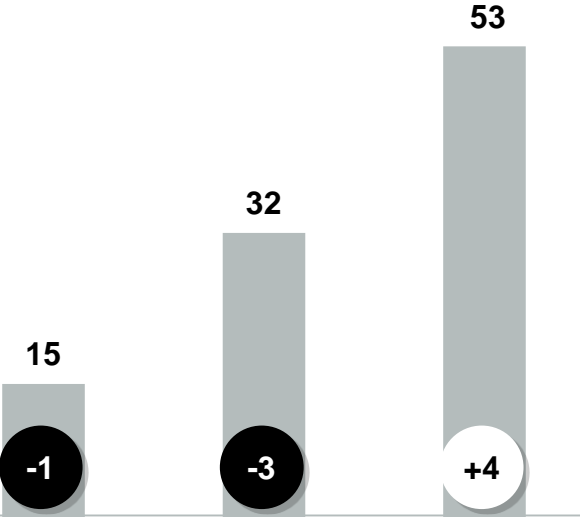
STRONG SENSE OF INJUSTICE; LACK OF CONFIDENCE IN THE SYSTEM

Per cent in Canada who agree

● — 0 — ●+ Change, 2019 to 2020

How true is this for you?

Sense of injustice	74
Desire for change	69
Lack of confidence	65
Lack of hope	30



The system is...

Working for me Not sure Failing me

Capitalism as it exists today
**does more harm than
good in the world**

47%



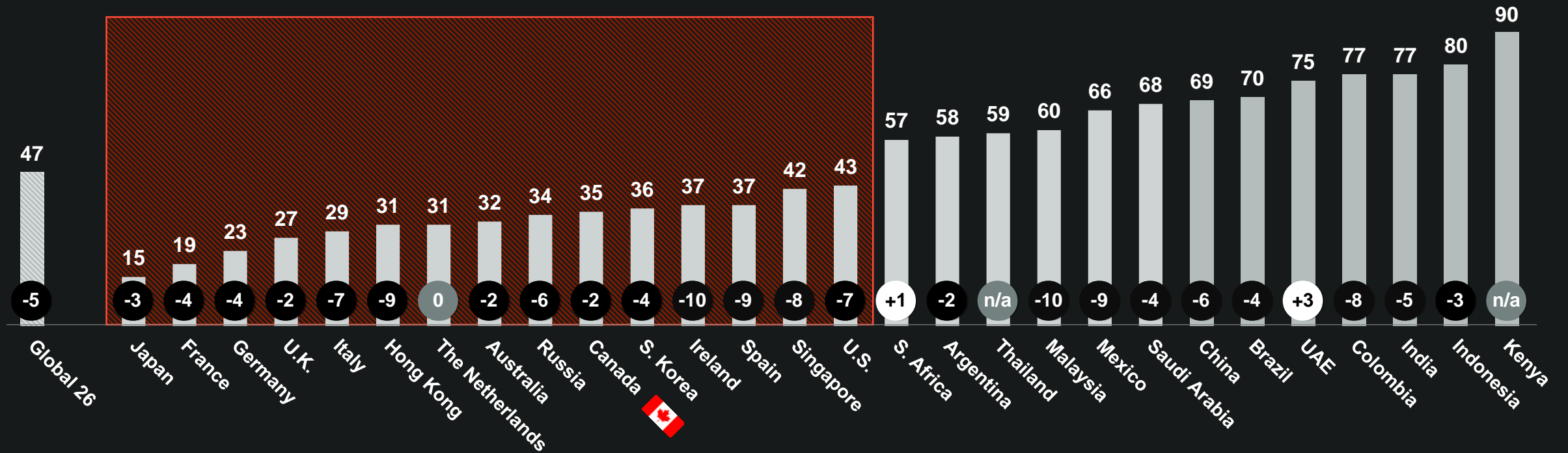
2020 Edelman Trust Barometer. "System failing" measure. For full details on how the "system failing" measure was calculated, please refer to the Technical Appendix. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is. 9-point scale; top 4 box, true. General 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]. 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 of the sample. General population, Canada.

PESSIMISM ABOUT ECONOMIC PROSPECTS

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

- 0 + Change, 2019 to 2020

Majority pessimistic in 15 of 28 markets



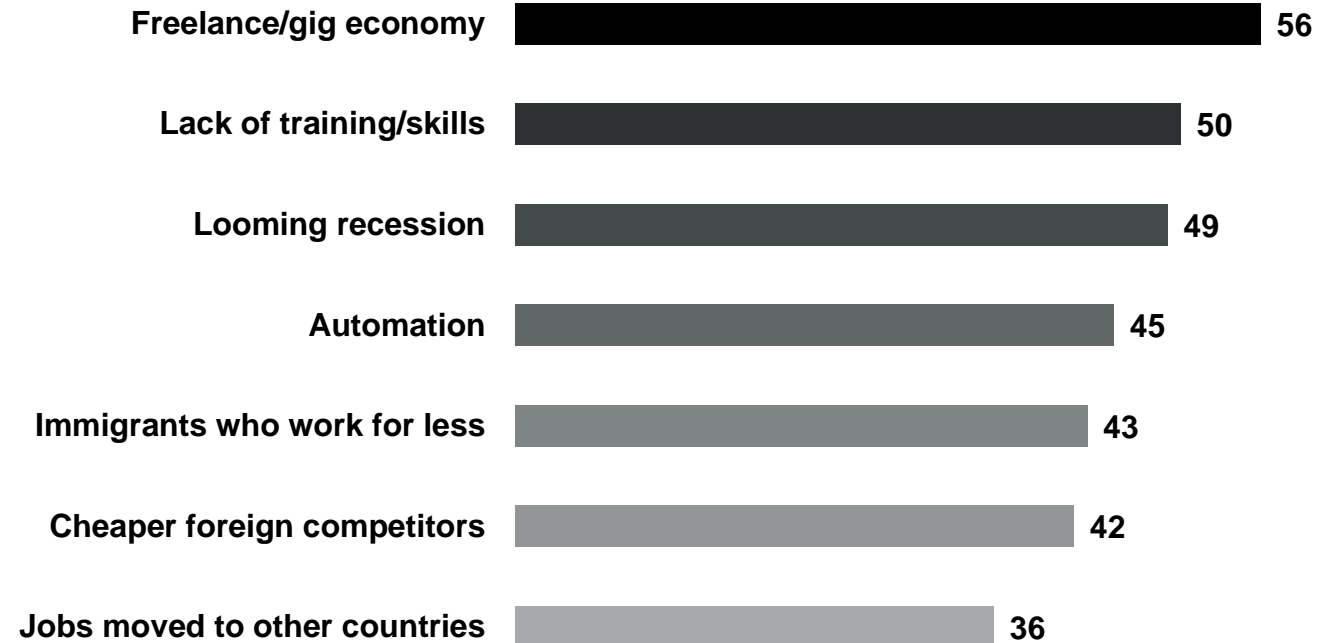
WORRY ABOUT THE FUTURE OF WORK

Per cent of employees in Canada who worry about job loss due to each issue

I worry about **losing my job**
due to one or more of these causes

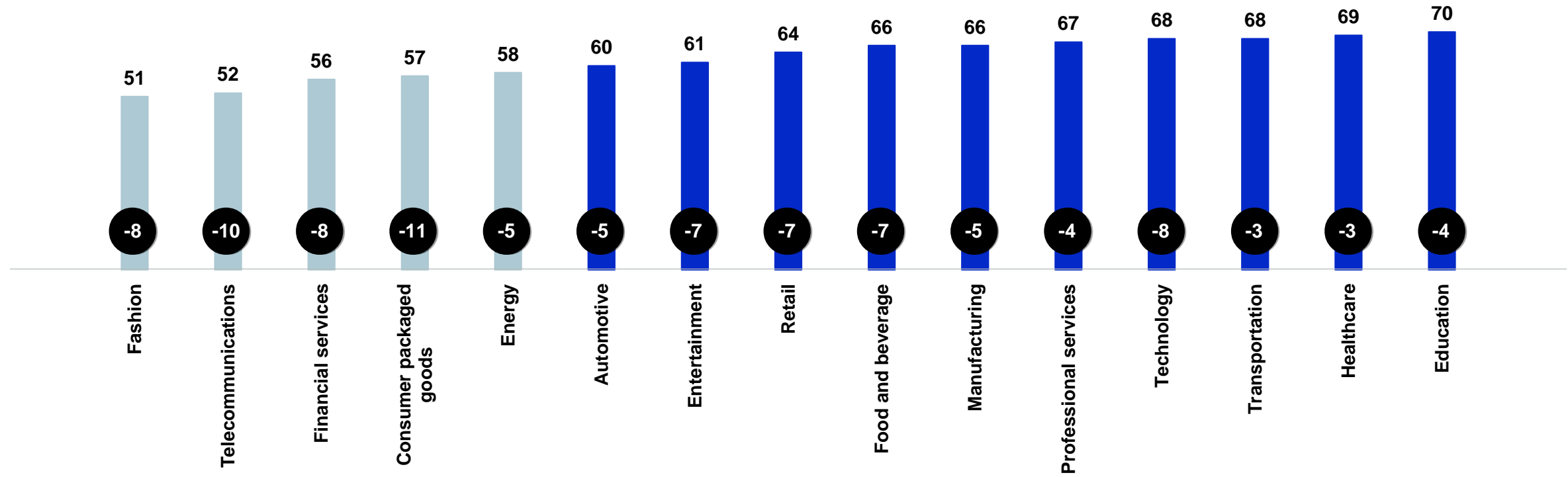
⊥

76%



TRUST DECLINES ACROSS SECTORS

Per cent trust in each sector in Canada



WORRY TECHNOLOGY IS OUT OF CONTROL

Per cent in Canada who agree

The pace of change in technology is **too fast**

Government **does not understand emerging technologies** enough to regulate them effectively

I worry technology will make it impossible to know if **what people are seeing or hearing is real**

⊥

62%

⊥

65%

⊥

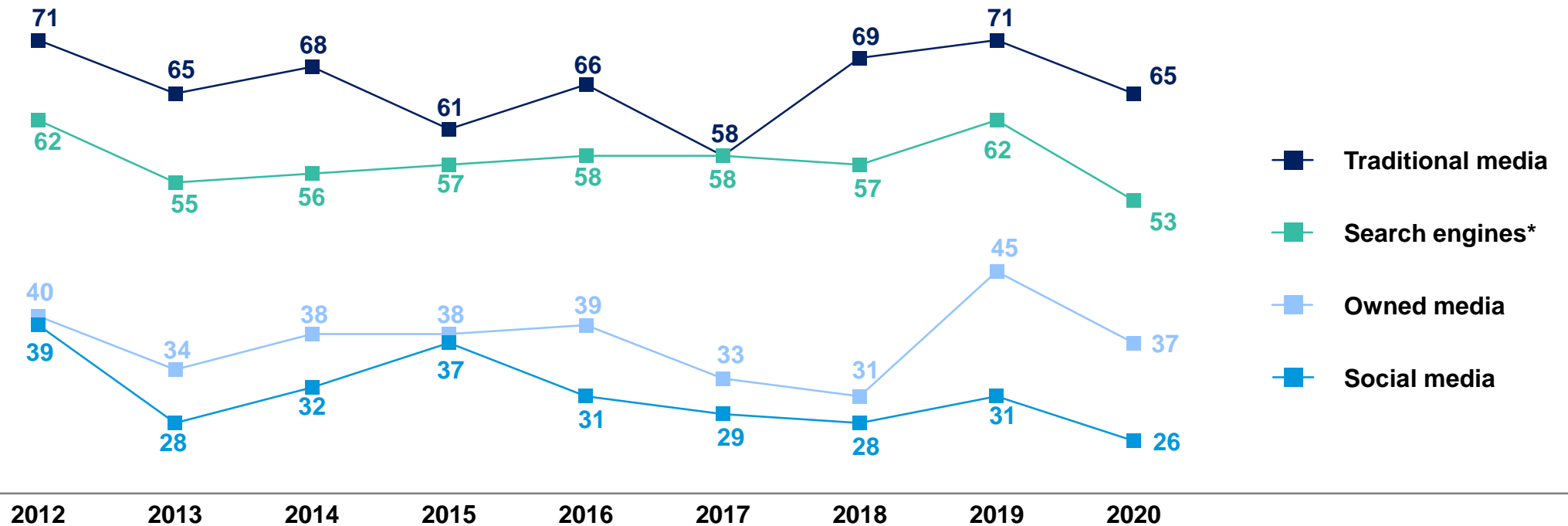
66%



2020 Edelman Trust Barometer. CNG_POC. For the statements below, please think about the pace of development and change in society today and select the response that most accurately represents your opinion. 9-point scale; top 4 box, fast. Canada. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement. 9-point scale; top 4 box, agree. Canada. PER_GOV. How well do you feel the government is currently doing each of the following? 5-point scale; bottom 3 box, not doing well (data excludes DK responses). Canada. 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. 26-mkt avg. All questions asked of half of the sample among the general population.

TRUST IN NEWS AND INFORMATION SOURCES DECLINES

Per cent trust in each source for general news and information in Canada



2020 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? 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."

SOCIETAL LEADERS NOT TRUSTED TO ADDRESS CHALLENGES

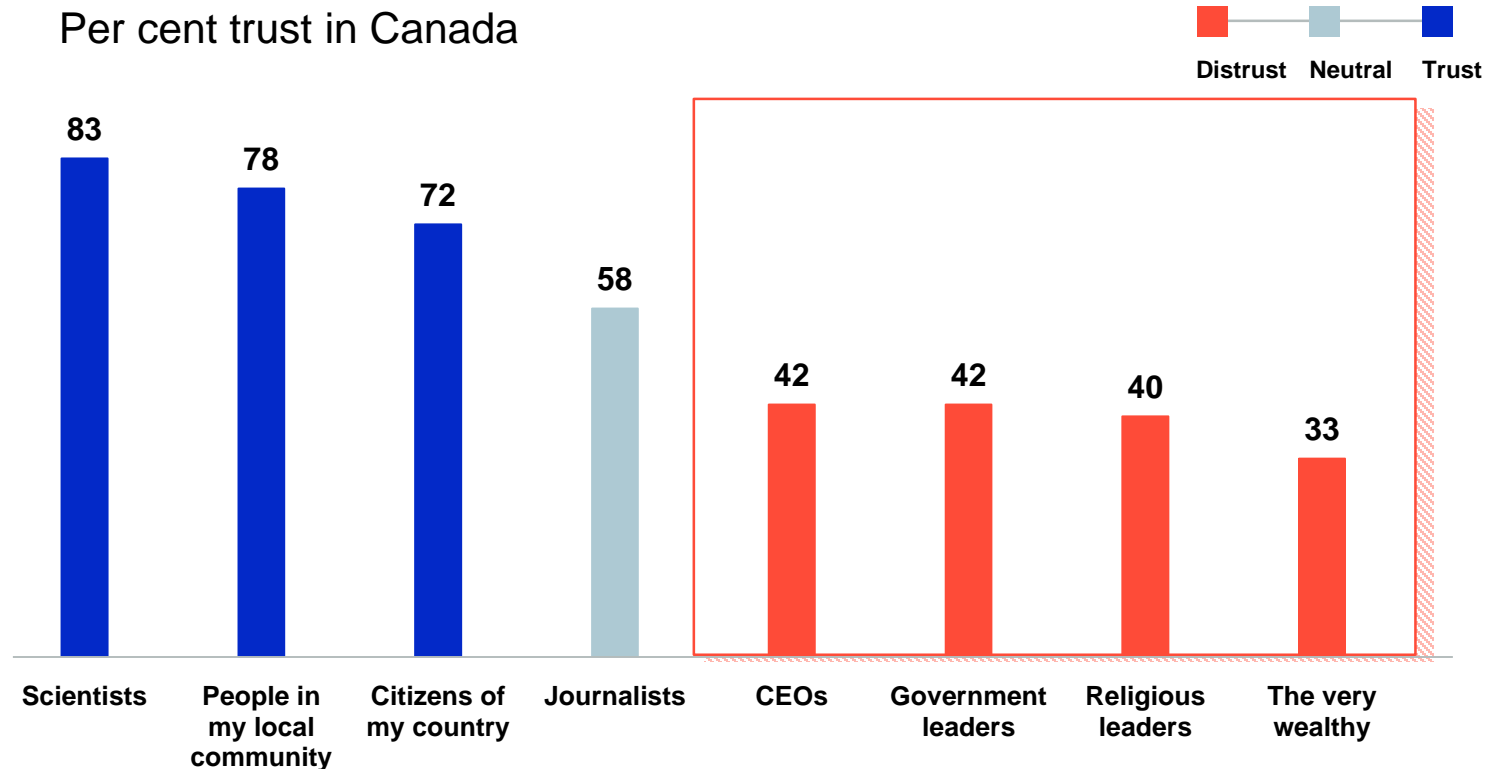
“

I do not have confidence that our current leaders will be able to successfully **address our country's challenges**

”

65%

Per cent trust in Canada

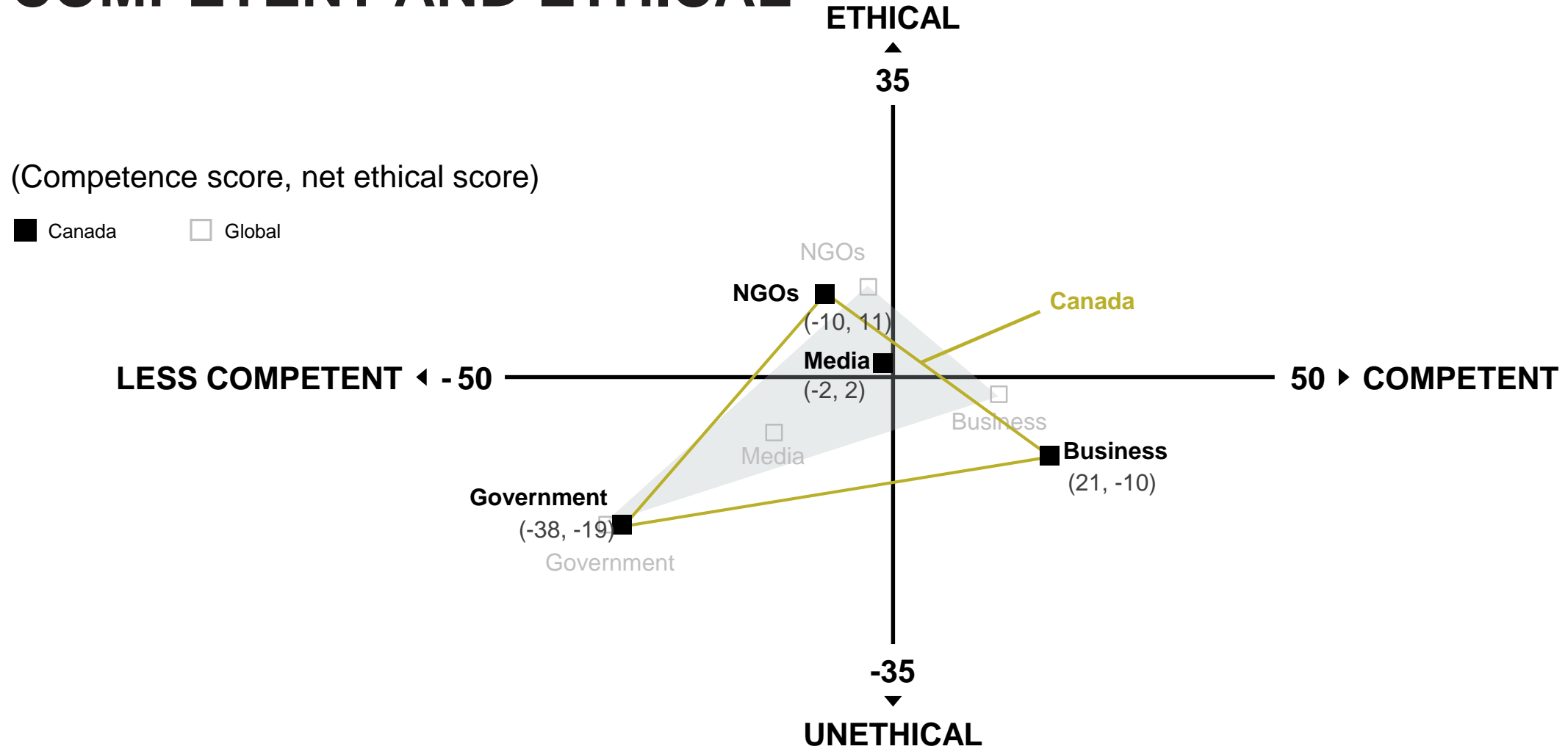


2020 Edelman Trust Barometer. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is. 9-point scale; top 4 box, true. TRU_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. General population, Canada

A black and white photograph of a woman with long dark hair, wearing a dark blazer and large earrings, speaking at a podium. She is gesturing with her hands. In the background, there are large, semi-transparent numbers '20' and a stylized 'S' logo. The text 'TRUST IS BUILT ON COMPETENCE AND ETHICS' is overlaid in white, bold, sans-serif font across the center of the image.

**TRUST IS BUILT ON
COMPETENCE AND ETHICS**

NO INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL



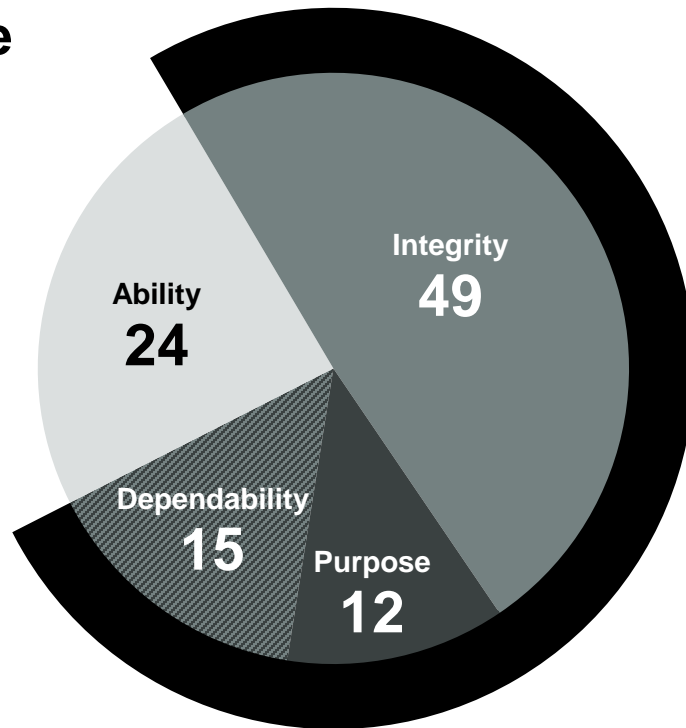
2020 Edelman Trust Barometer. The ethical scores are averages of nets based on [INSTITUTION]_PER_DIM r1-r4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INSTITUTION] r1. Depending on the question it was either asked of the full of half the sample. General population, 25-mkt avg and Canada. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

WHEN IT COMES TO TRUST, ETHICS IS IN THE DRIVER'S SEAT

Per cent of predictable variance in trust explained by each dimension

Competence

24%

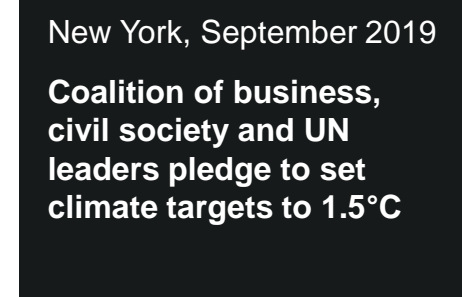


Ethics

76%



Biarritz, August 2019
Business for Inclusive Growth (B4IG) coalition forms to address inequality and diversity



New York, September 2019
Coalition of business, civil society and UN leaders pledge to set climate targets to 1.5°C



Toronto, November 2019
Maple Leaf Foods becomes the first major food company in the world to be carbon neutral.



New York, January 2020
BlackRock shifts investment strategy to focus on sustainability





**OVERCOME SKEPTICISM
THROUGH ACTION**

SERVE THE INTERESTS OF ALL STAKEHOLDERS

Per cent in Canada who ranked each group as most important

Per cent in Canada who agree



+ 91%

Stakeholders, not shareholders, are most important to long-term company success

74%

a company can take actions that both increase profits and improve conditions in communities where it operates

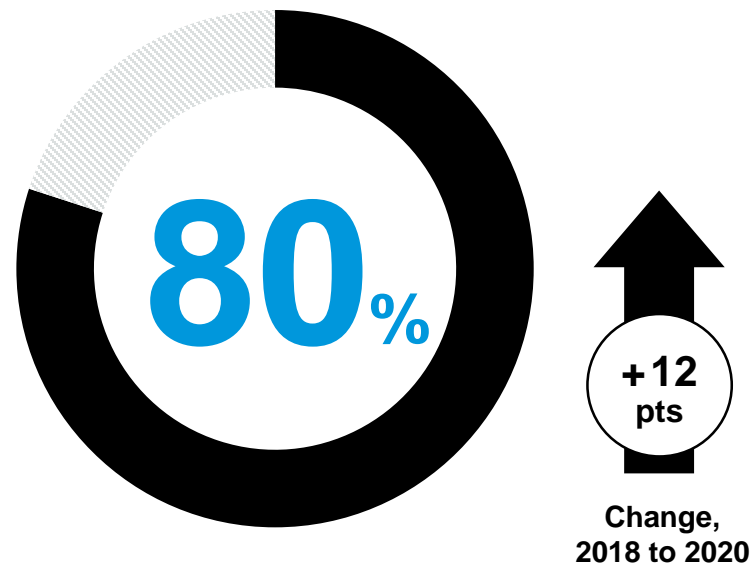


2020 Edelman Trust Barometer. PPL_RNK. Please rank the following four groups of people in terms of their importance to a company achieving long-term success. Give the most important group a rank of 1 and the least important a rank of 4. Stakeholders is a net of "Communities," "Customers," and "Employees". 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 of the sample. General population, Canada.

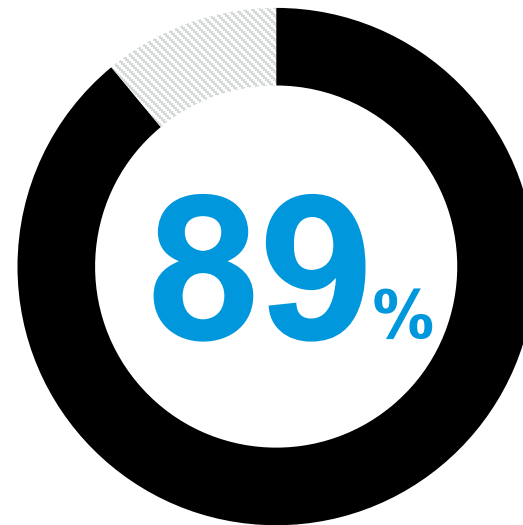
CEOS MUST LEAD

Per cent in Canada who agree

CEOs should take the lead on change rather than waiting for government to impose it



It is important that **my employer's CEO speak out** on one or more of these issues



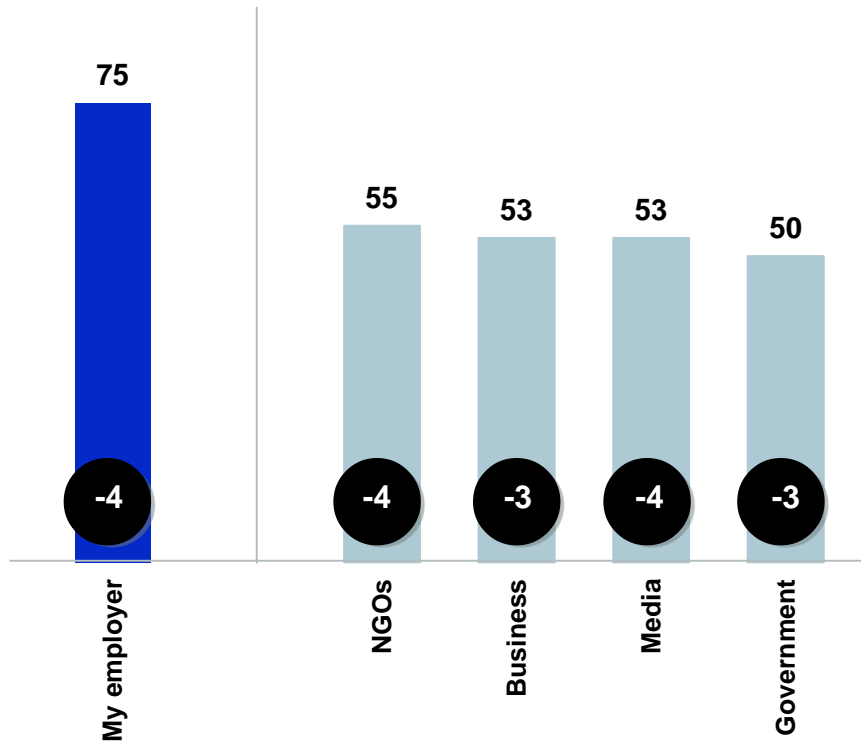
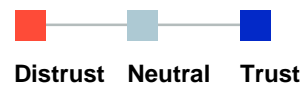
Training for jobs of the future	81
Ethical use of tech	75
Automation's impact on jobs	74
Income inequality	74
Diversity	70
Climate change	67
Immigration	53



2020 Edelman Trust Barometer. CEO_ISS. How important is it to you that the CEO or head of the organization you work for speaks out publicly about each of the following issues? 9-point scale; top 4 box, important. Question asked of those who are an employee (Q43/1). Issues is a net of codes 1-7. General population, Canada. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Canada.

EMPLOYEES EXPECT TO BE ENGAGED AND INVOLVED

Per cent trust in Canada



Per cent of employees in Canada who expect each from a prospective employer

65%

Opportunity to **shape the future** of society

68%

Employees **included in planning**



2020 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? 3-point scale; sum of codes 1 and 2, important. Question asked of those who are an employee (Q43/1). TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is. 9-point scale; top 4 box, trust. "Your employer" asked of those who are an employee (Q43/1). General population, Canada.

PARTNERSHIP BETWEEN BUSINESS AND GOVERNMENT ESSENTIAL ON JOBS

Per cent who say each institution is the one they trust most to address each challenge

Protect workers in the **gig economy**



In Canada	
Government	44
Business	28
NGOs	19
Media	8

Workforce retraining necessary as a result of automation



In Canada	
Business	40
Government	35
NGOs	18
Media	7



2020 Edelman Trust Barometer. INS_ADD. For each of the challenges described below, please indicate whether you trust business, government, media or NGOs the most to address that challenge and develop workable solutions. Question asked of half of the sample. General population, 28-mkt avg (data in background) and Canada.

OPPORTUNITY FOR ACTION ON PRIORITY TRUST DRIVERS

Per cent in Canada who think each institution is doing well/very well on the issue

NGOs	
Transparency about funding	28
Avoid becoming politicized	29
Expose corruption	30
Partner with business	33
Set goals with regular public updates	34

Business	
Partner with NGOs	27
Partner with government	30
Sustainable business practices	35
Jobs that pay a decent wage	35
Invest in employee training	37

Government	
Reduce partisanship	19
Partner with NGOs	24
Community-level problems	27
Partner with business	29
Social services for the poor	30

Media	
Keep social media clean	35
Important vs sensationalized	38
Being objective	38
Differentiate opinion and fact	39
Information quality	40



2020 Edelman Trust Barometer. PER_[INSTITUTION]. How well do you feel [institution] is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked of half of the sample. General population, Canada. Data not collected in China, Russia and Thailand.

KEY TAKEAWAYS



KEY TAKEAWAYS

Redefine leadership

KEY TAKEAWAYS

Redefine leadership

Embrace stakeholders, not just shareholders

KEY TAKEAWAYS

Redefine leadership

Embrace stakeholders, not just shareholders

Partner across institutions

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Redefine leadership

Embrace stakeholders, not just shareholders

Partner across institutions

**Battle for trust hinges on integrity,
dependability and purpose**