

Spring Update:
Trust and the
COVID-19 Pandemic

Canada Findings

Edelman Trust Barometer 2020



Spring Update: Trust and the COVID-19 Pandemic

Methodology



Online survey in 11 markets:

Canada, China, France, Germany, India, Japan, Mexico, Saudi Arabia, S. Korea, U.K. and U.S.

13,200+ respondents total

All fieldwork was conducted between April 15 and April 23, 2020

January 2020 Trust Barometer fieldwork was conducted between October 19 and November 18, 2019

11-market global data margin of error: General population +/- 0.9% (N=13,200), informed public +/- 3.0% (N=1,100), mass population +/- 1.0% (N=10,741+).

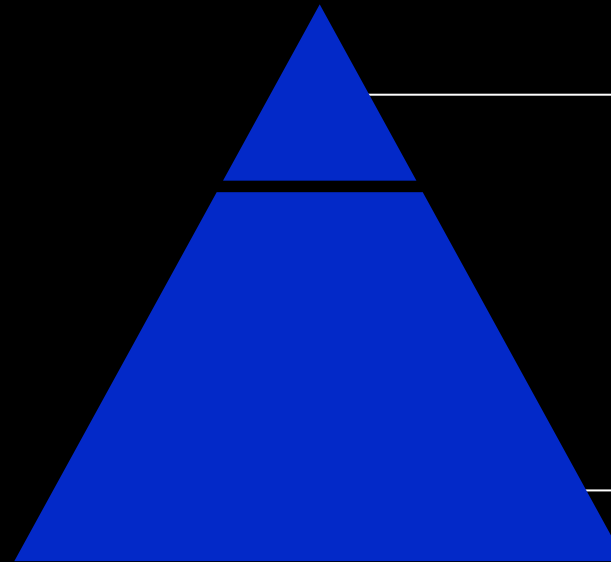
Market-specific data margin of error: General population +/- 2.8% (N=1,200), informed public +/- 9.8% (N=100), mass population +/- 2.9% to 3.7% (N=min 691, varies by market).

General Online Population

1,200
respondents
per market

Ages
18+

All slides show general
online population data
unless otherwise noted



Informed Public

100 respondents in each market
Represents **19%** 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 **81%** of total
global population



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TRUST AT ALL-TIME HIGHS

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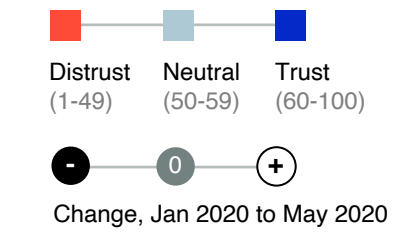
A RECORD RISE IN TRUST; TRUST INDEX AT ALL-TIME HIGH

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

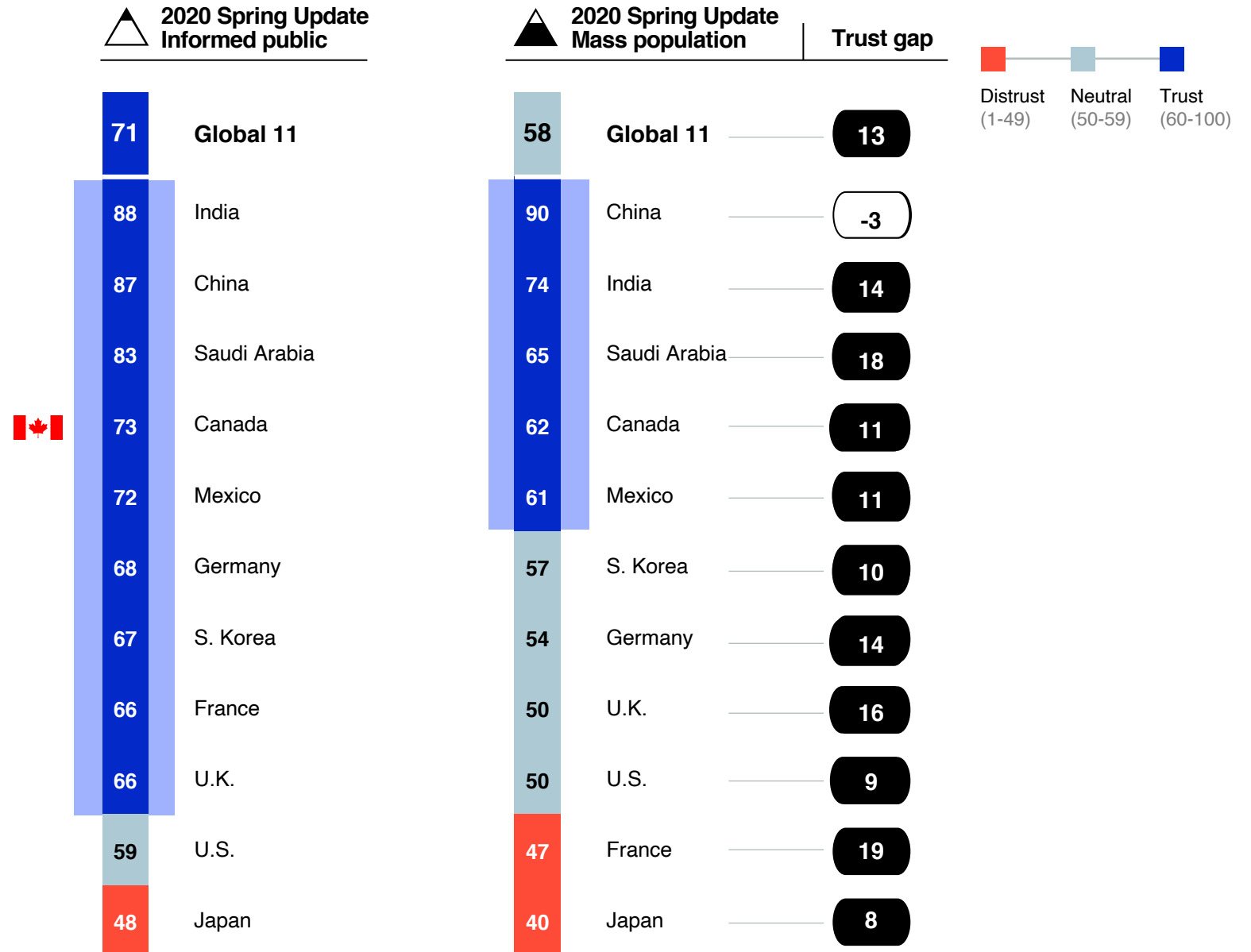
PERSISTENT TRUST INEQUALITY

Trust Index

Informed public 13 points more trusting than the mass population

Double-digit trust inequality in 8 of 11 markets measured

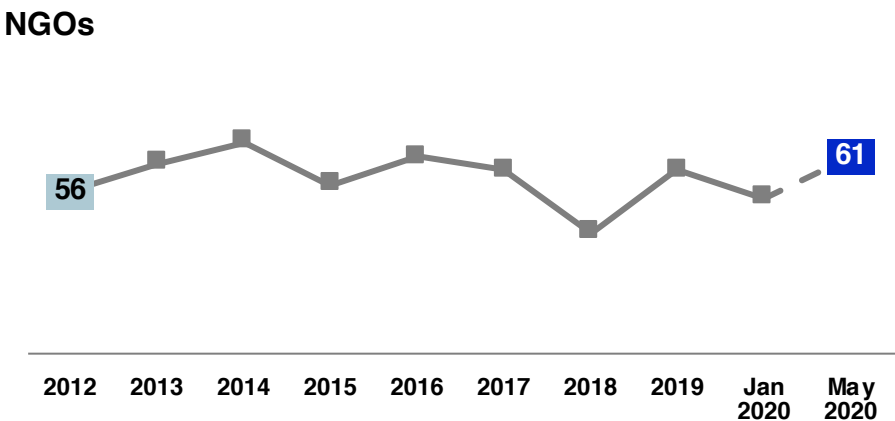
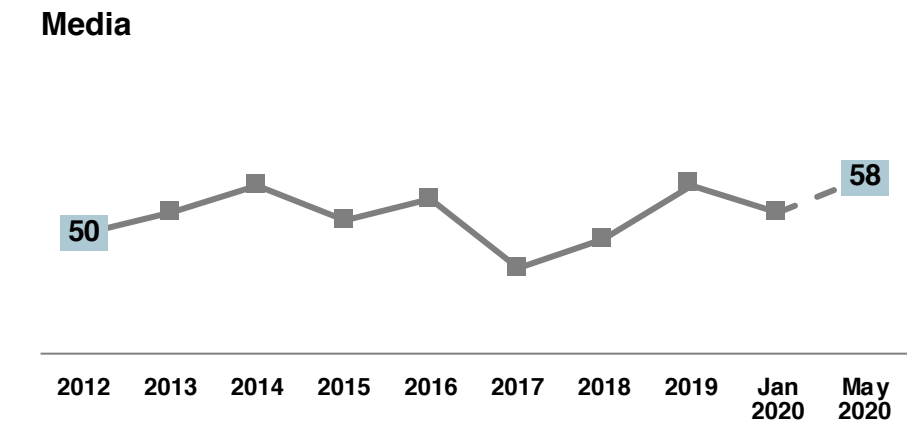
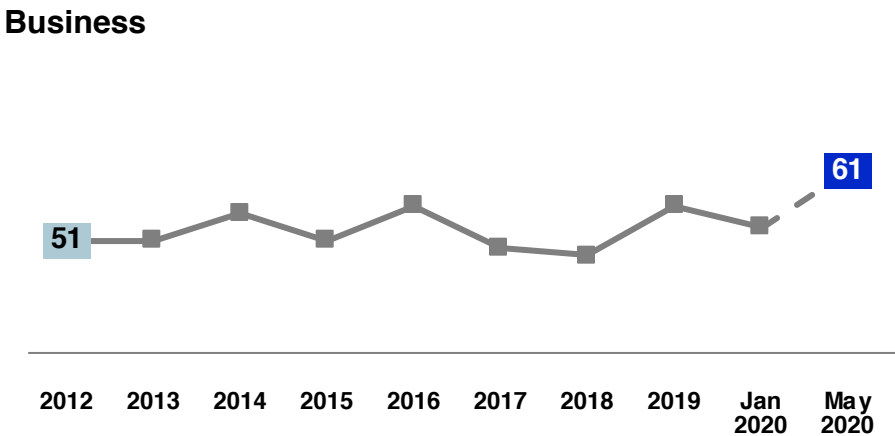
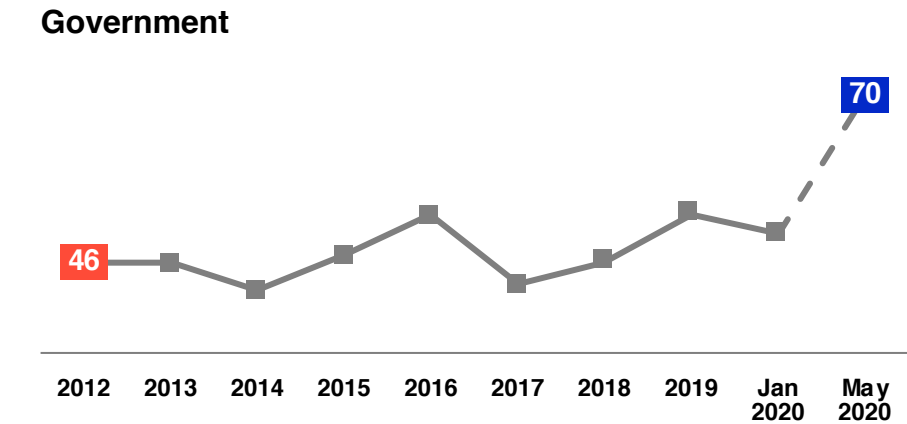
2020 Edelman Trust Barometer Spring Update. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed public and mass population, 11-mkt avg.



RECORD HIGHS FOR GOVERNMENT, BUSINESS AND MEDIA



Per cent trust in Canada




⌊

GOVERNMENT'S MOMENT TO LEAD

⌋

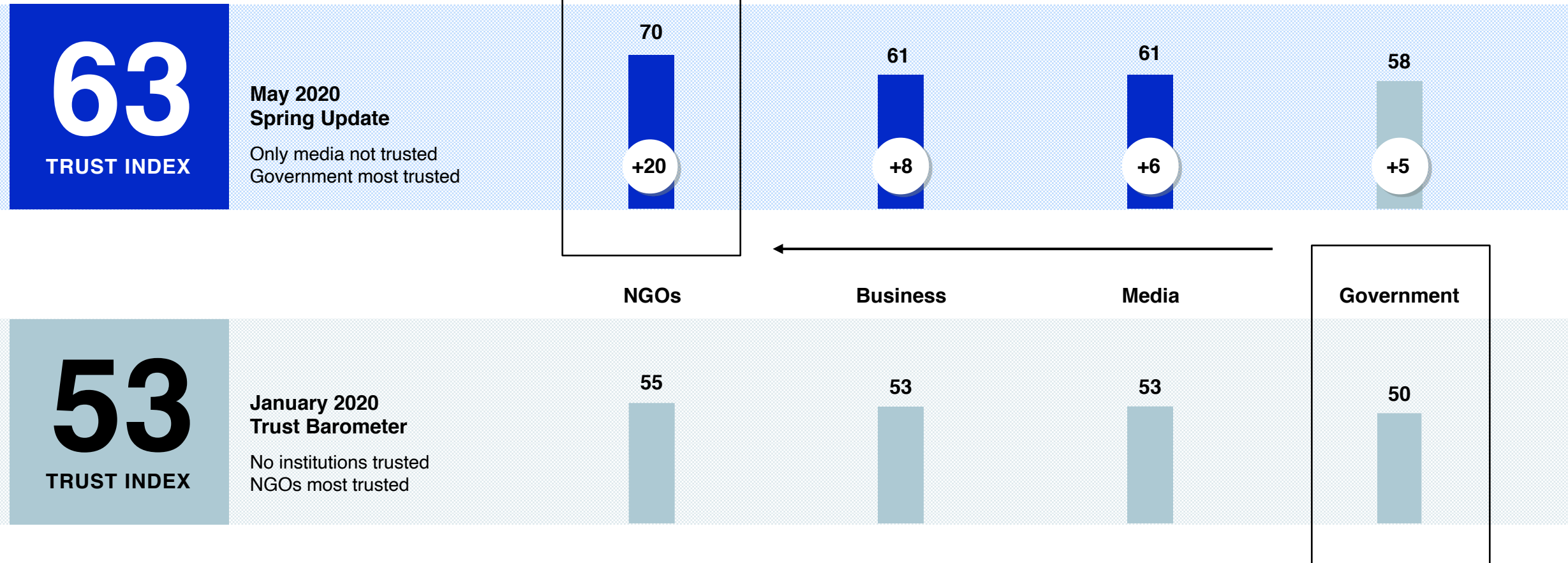



Governor
Andrew M. Cuomo



A RE-ORDERING OF TRUST: GOVERNMENT RISES TO THE TOP

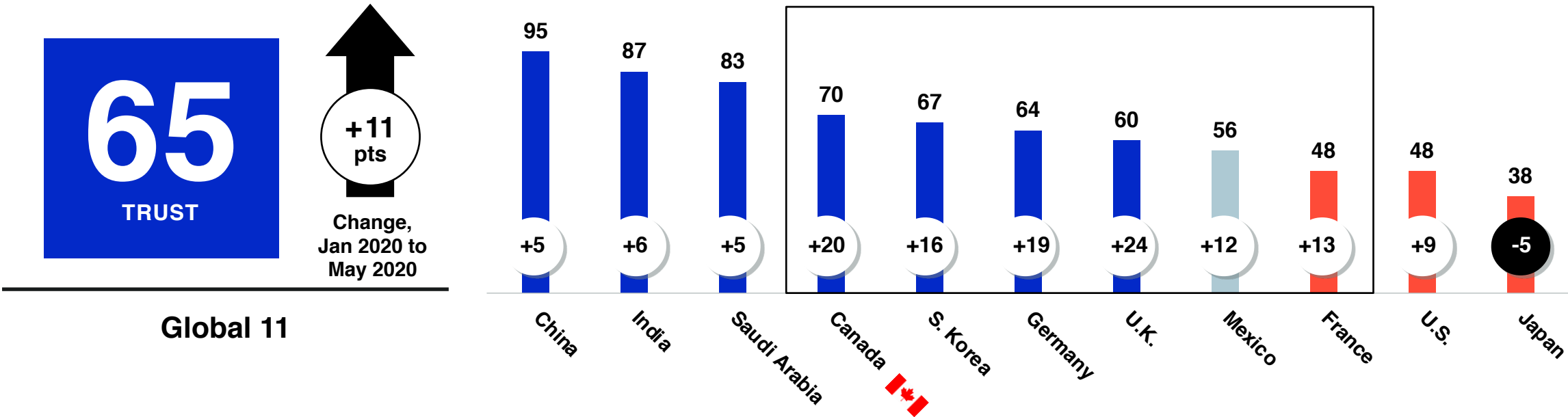
Per cent trust in Canada



2020 Edelman Trust Barometer Spring Update. 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, Canada.

GOVERNMENT IN CANADA SEES SECOND-HIGHEST INCREASE GLOBALLY

Per cent trust in government



2020 Edelman Trust Barometer Spring Update. TRU_INS. [Government 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.

GOVERNMENT EXPECTED TO LEAD IN ALL AREAS OF PANDEMIC RESPONSE

Per cent in Canada who expect each institution to take a leading role to address each challenge

Highest expectation in all areas

Government	
Contain the pandemic	83
Inform the public	82
Provide economic relief and support	91
Help people cope	79
Get the country back to normal	86

Other institutions expected to contribute in their areas of expertise

Media	
Contain the pandemic	15
Inform the public	61
Provide economic relief and support	15
Help people cope	27
Get the country back to normal	18

Business	
Contain the pandemic	31
Inform the public	19
Provide economic relief and support	53
Help people cope	46
Get the country back to normal	35

NGOs	
Contain the pandemic	36
Inform the public	28
Provide economic relief and support	27
Help people cope	52
Get the country back to normal	23

PERMISSION TO RESTRICT MOVEMENT

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.

Pandemic-related restrictions on my freedom of movement are **entirely reasonable and appropriate**

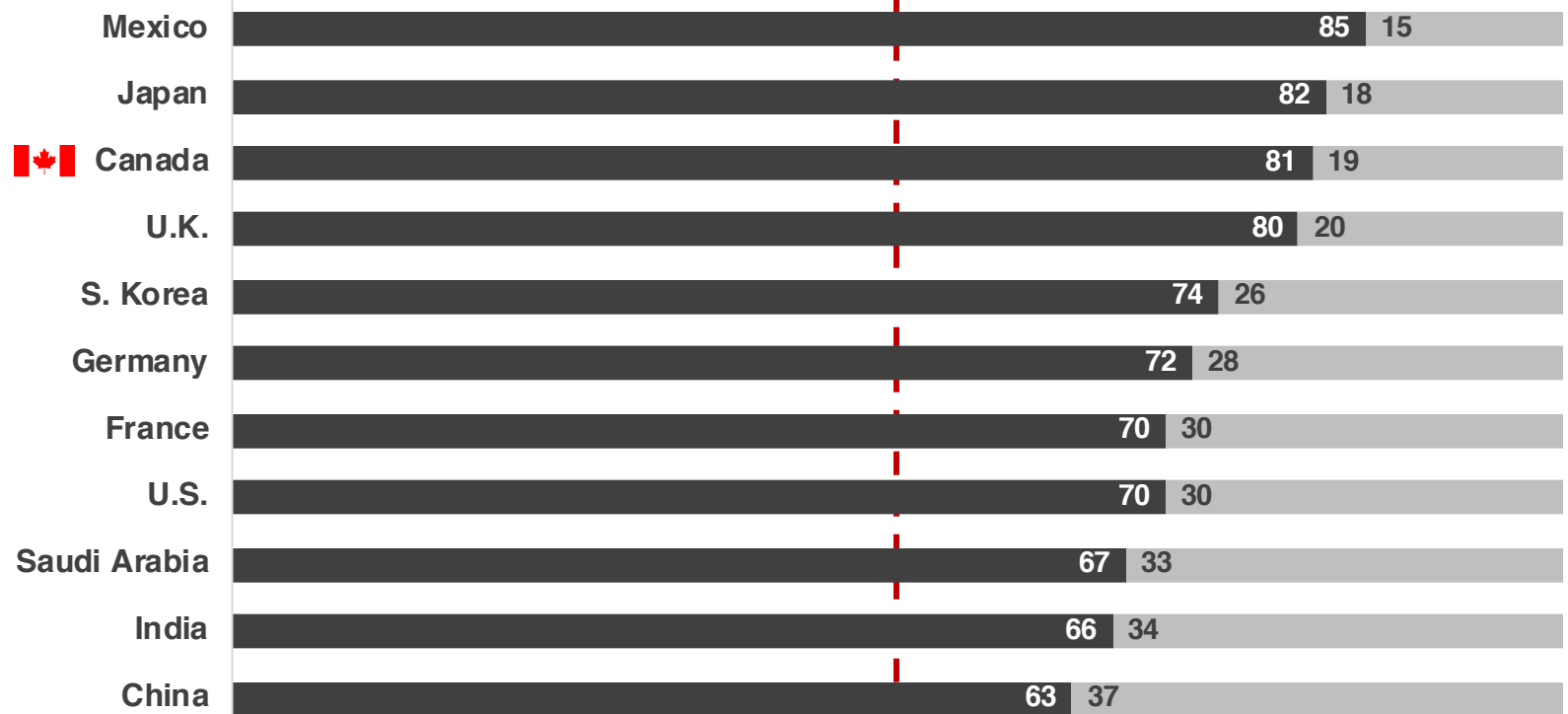
OR

The government is **restricting my freedom of movement** more than it should be allowed to

73%

27%

Global 11



50%

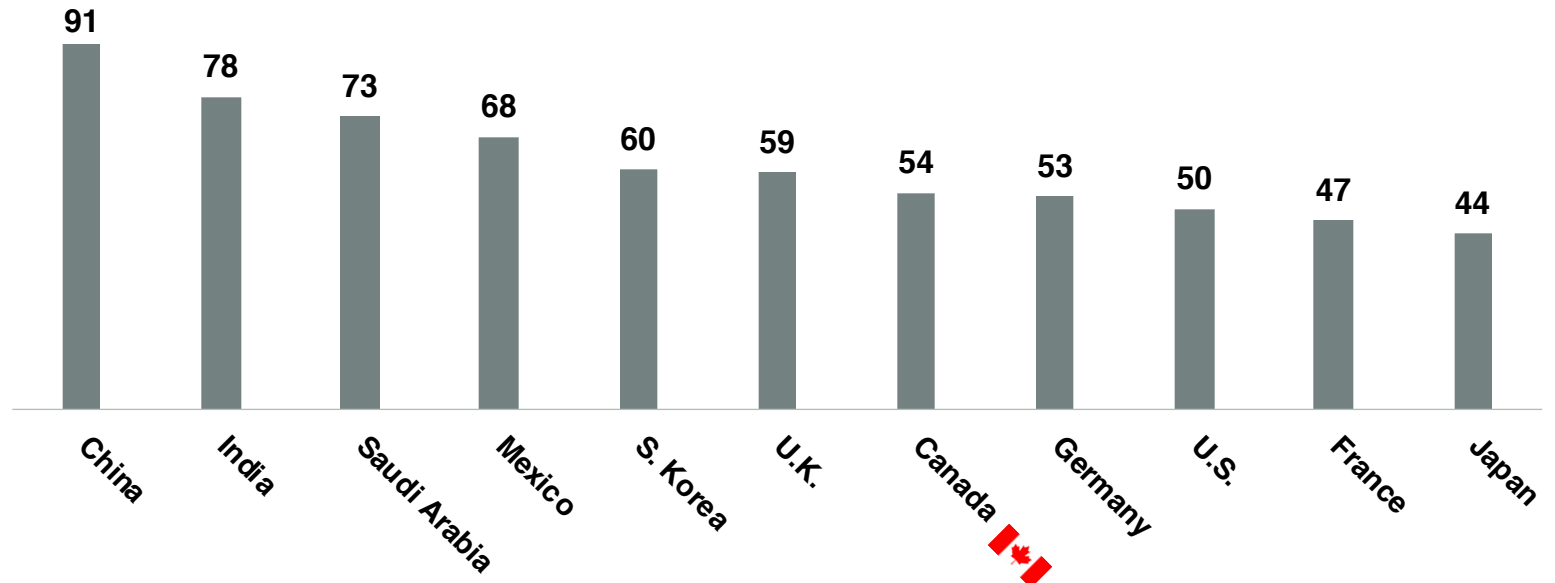
PERMISSION TO TRACK PERSONAL DATA

Per cent who agree

I am **willing to give up more of my personal health and location tracking information** to the government than I normally would in order to help track and contain the spread of the virus

61%

Global 11

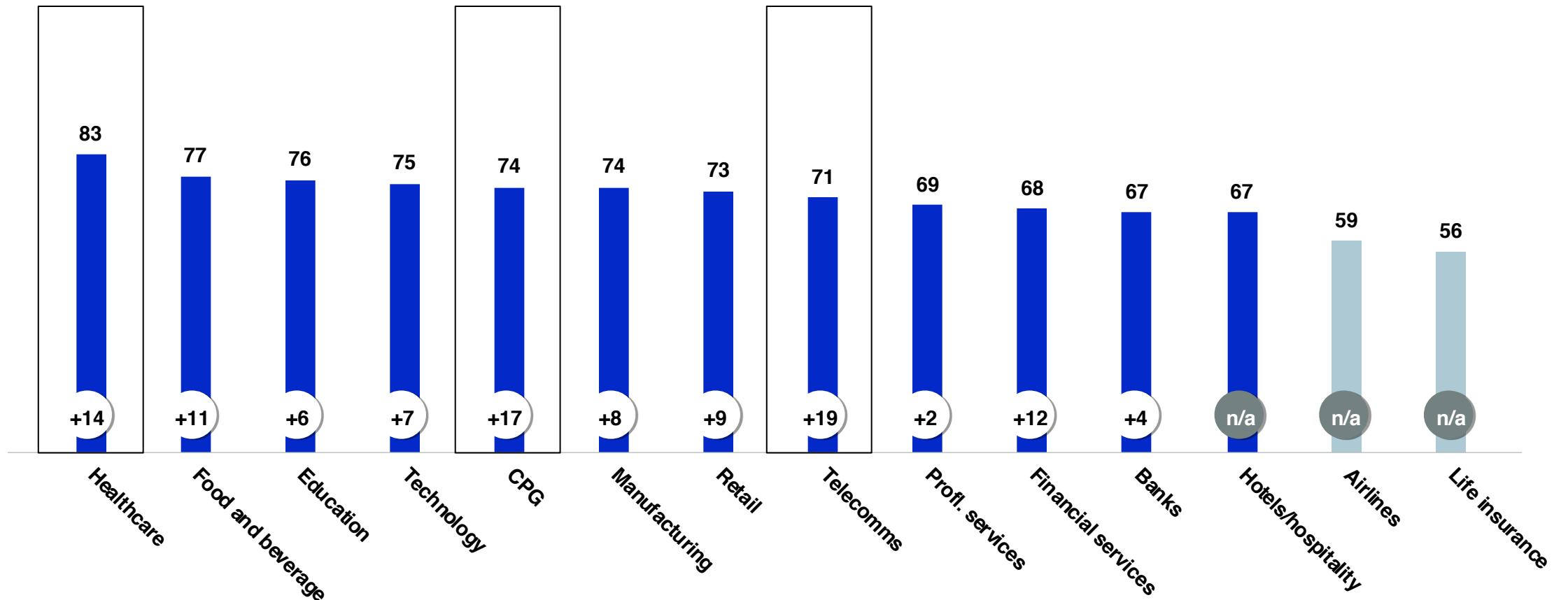




CHANGING EXPECTATIONS OF BUSINESS

GREATEST TRUST GAINS FOR SECTORS ON THE FRONT LINE

Per cent trust in each sector in Canada

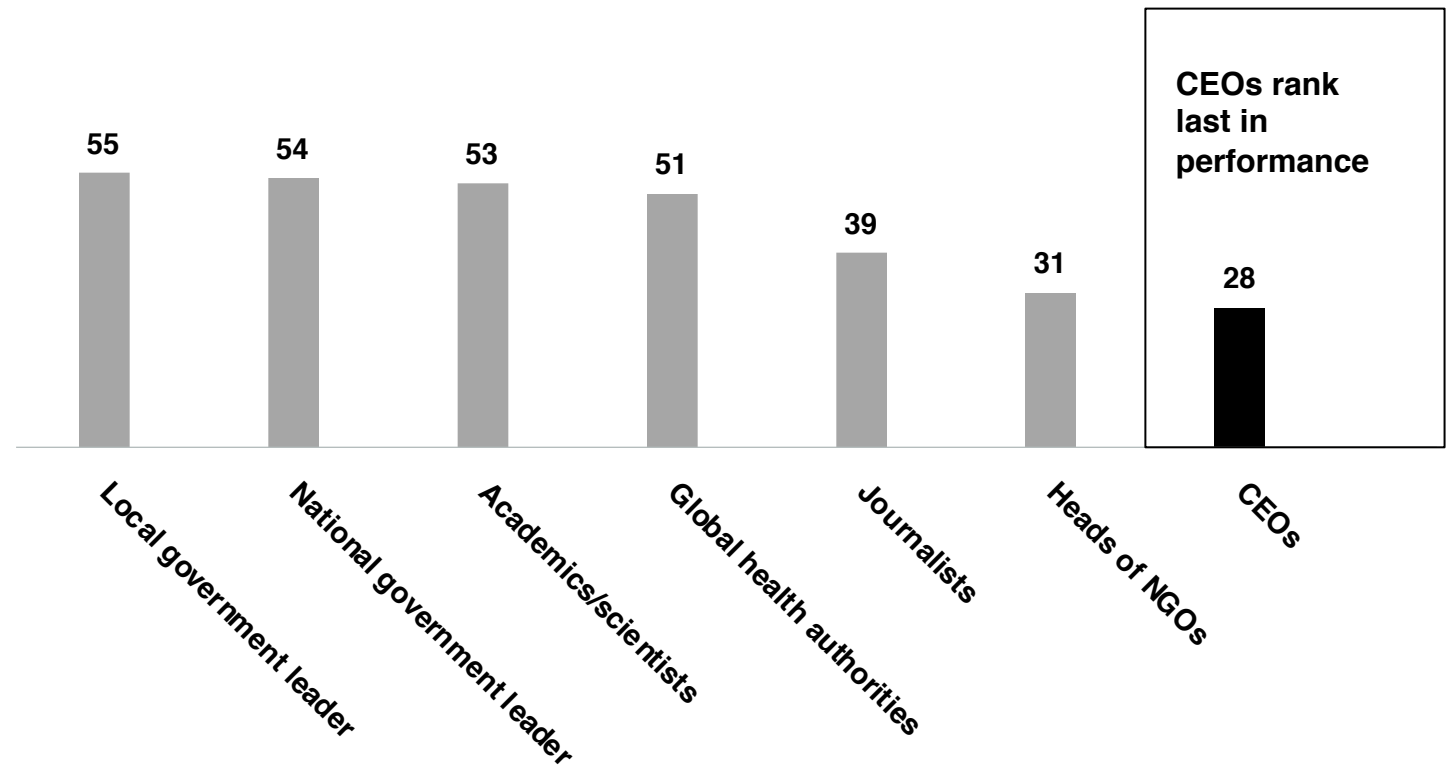


GAP BETWEEN EXPECTATIONS AND PERFORMANCE FOR BUSINESS LEADERSHIP

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

└
60%

Per cent in Canada who say each are doing **an outstanding job** meeting the demands placed on them by the pandemic



THE NEW SCORECARD FOR BUSINESS

Per cent in Canada 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

└
53%

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

└
48%

doing this well or very well

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

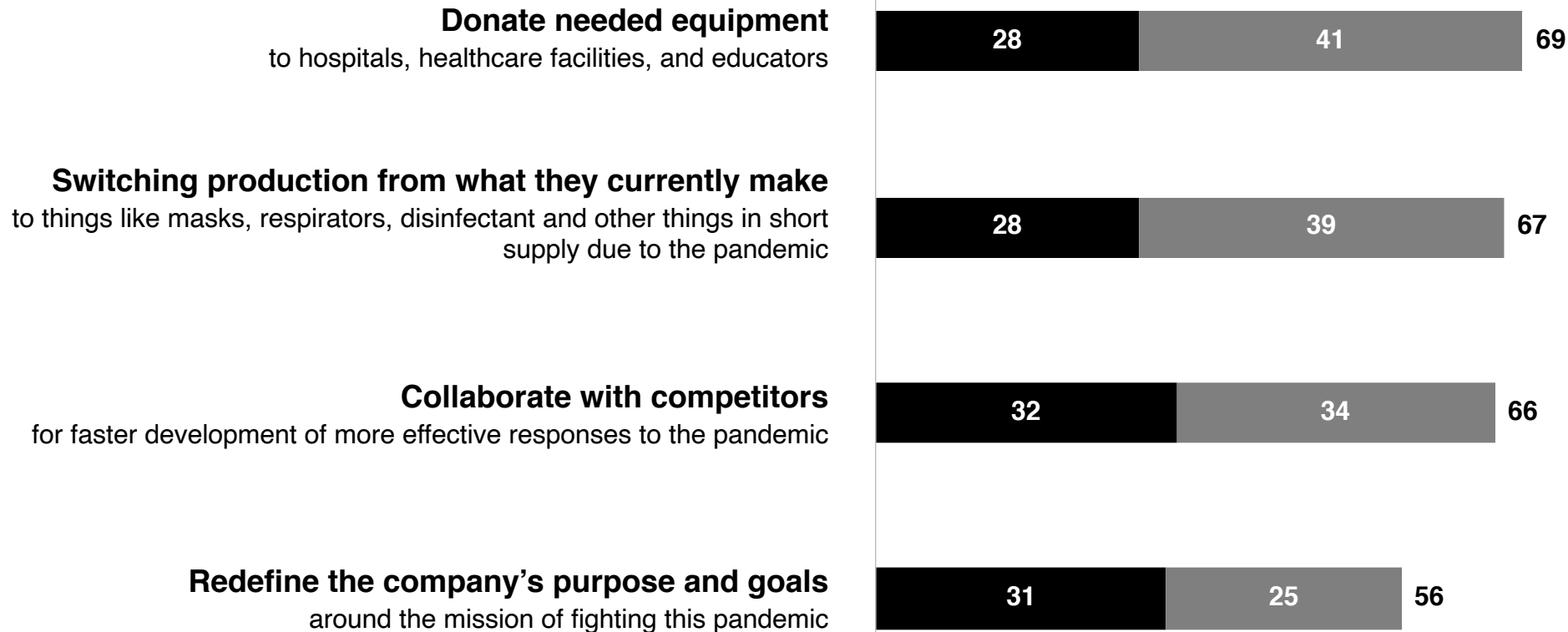
└
42%

doing this well or very well

CALL FOR BUSINESS TO FOCUS ON SOLUTIONS, NOT SELLING

Per cent in Canada who indicate that the below actions will maintain or increase their trust in business

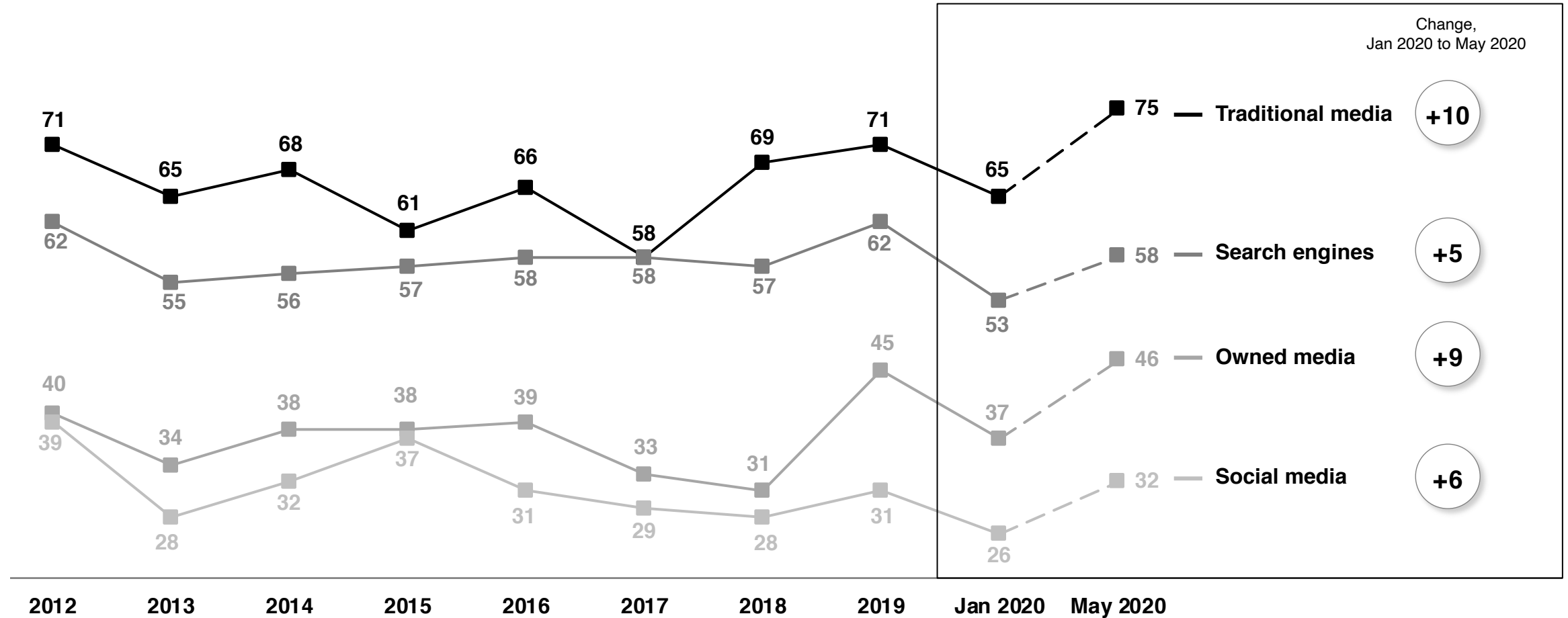
■ Maintain ■ Increase



L
**CANADIANS TURN TO
MEDIA AND EXPERTS**
T

TRUST INCREASE FOR ALL NEWS SOURCES; GREATEST GAINS FOR TRADITIONAL AND OWNED MEDIA

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



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, Canada.

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

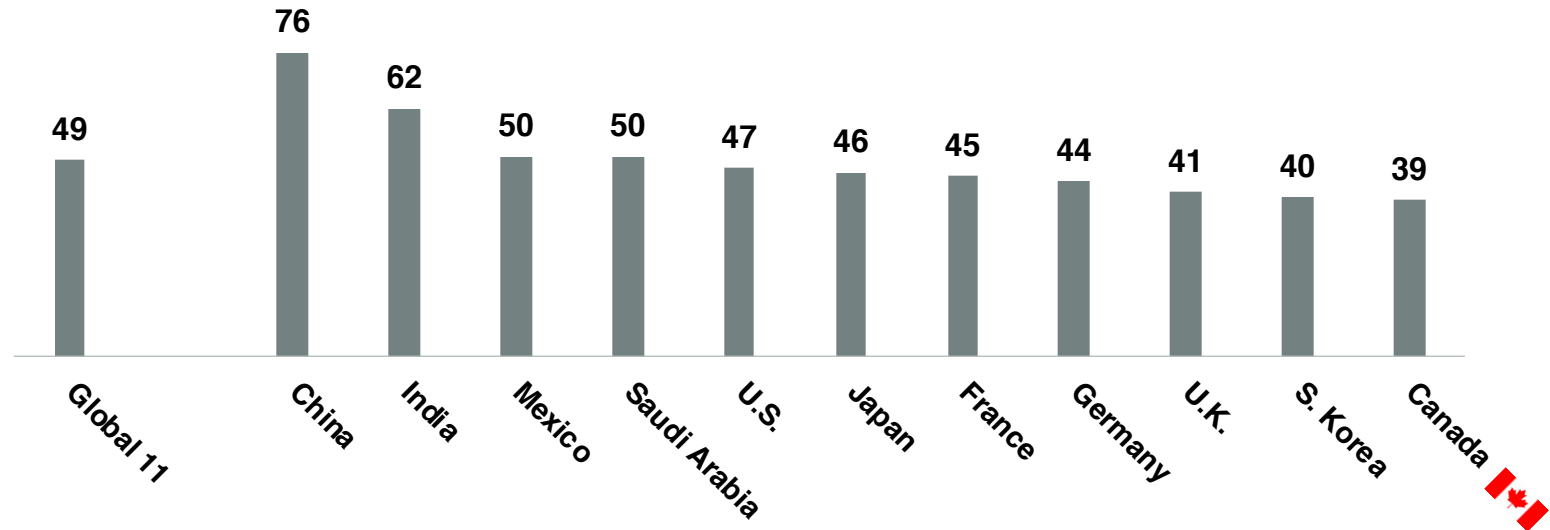
FAKE NEWS CONCERNS ADD TO INSTABILITY

Per cent in Canada who agree

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

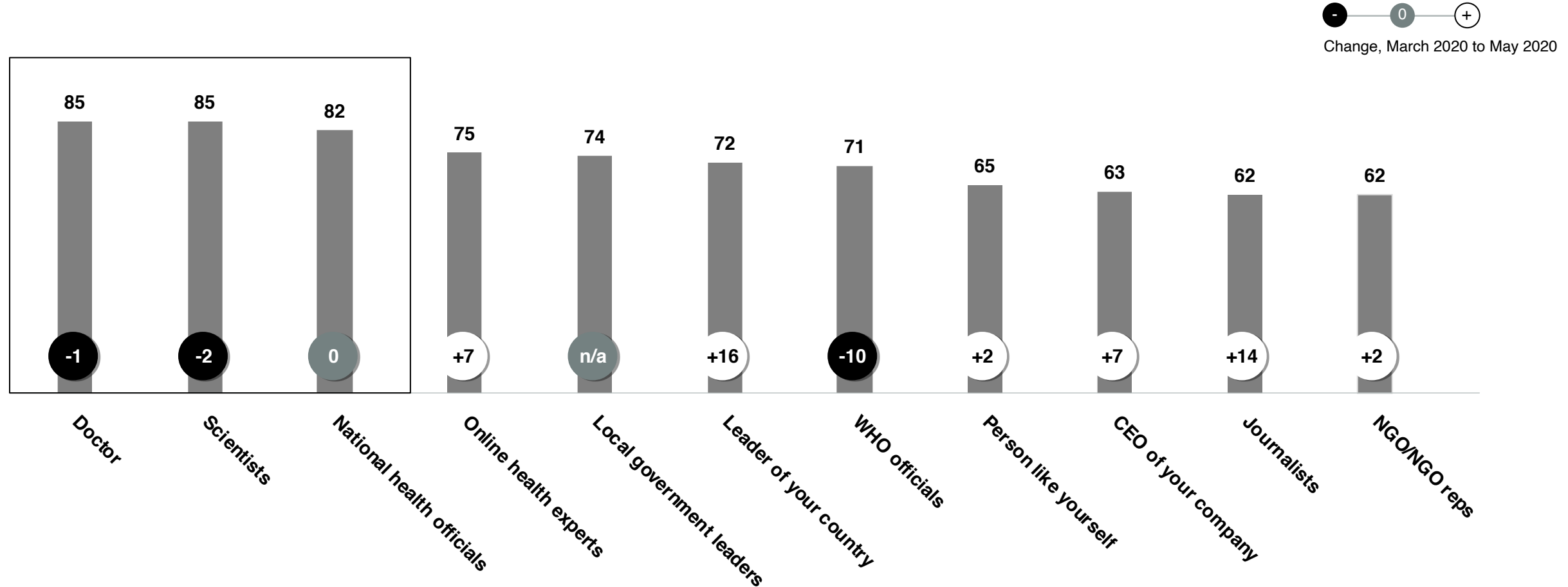
⊥
63%

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



A CALL FOR EXPERT VOICES

Per cent in Canada 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). Canada. "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, Canada.

SOCIETAL FEARS STRAIN THE SYSTEM



FEAR OF JOB LOSS BROADENS

Per cent in Canada who agree

January 2020 Edelman Trust Barometer


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

⊥
76%

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

⊥
49%

 **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, Canada, 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, Canada, among those who are employed, furloughed/laid off due to the pandemic or unemployed for other reasons (Q206/1,2,8,9,10).

PANDEMIC SPOTLIGHTS SOCIETAL INEQUITIES

Per cent in Canada 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**

⊥
60%

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

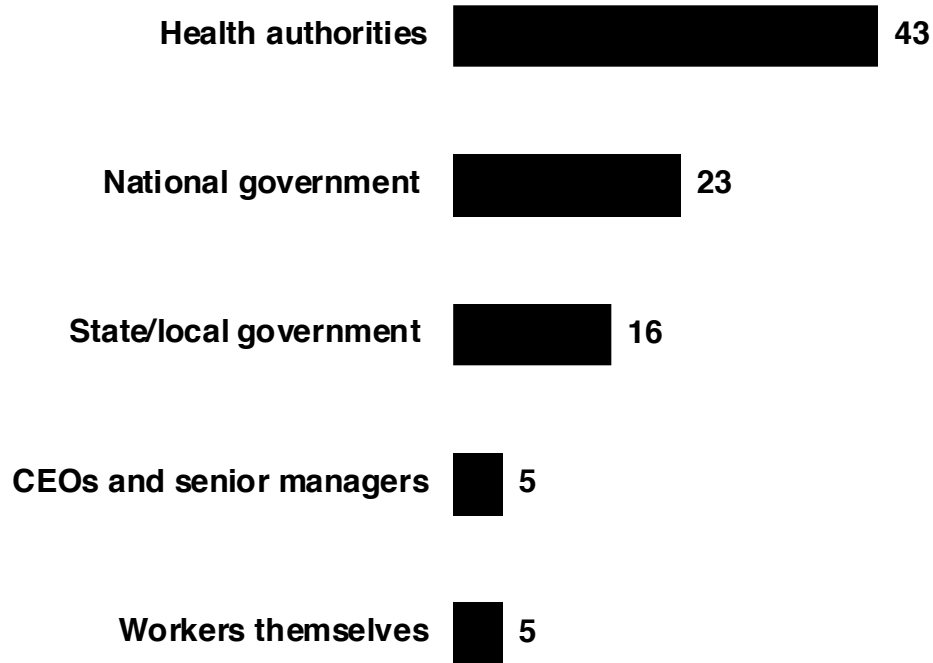
⊥
64%



TOWARDS A
NEW NORMAL

BUSINESS MUST PARTNER WITH GOVERNMENT FOR RESPONSIBLE RETURN TO WORK

Per cent in Canada who say each should lead in making return 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

84%

16%

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.

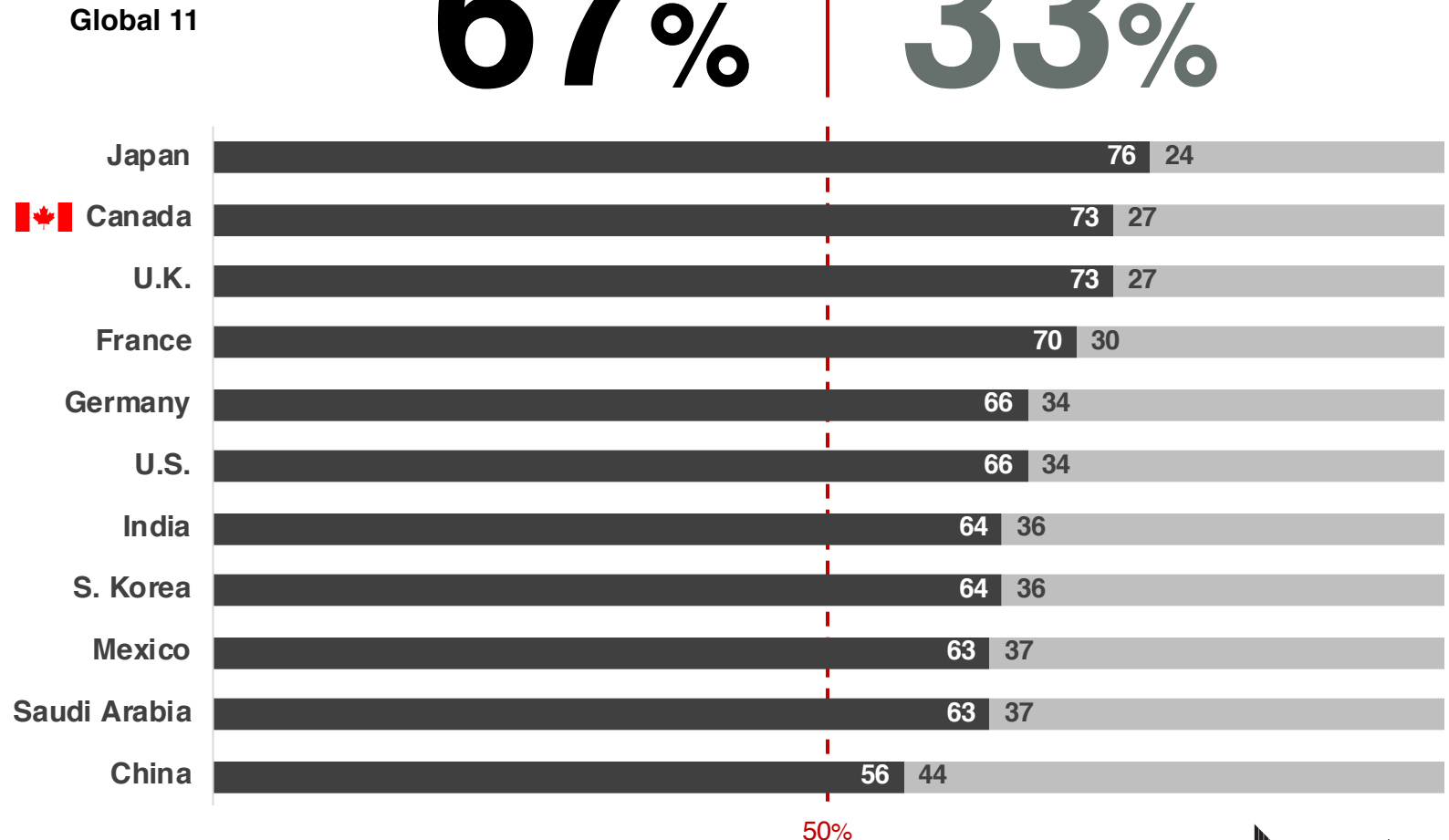
The government's highest priority
should be **saving as many lives
as possible**, even if it means the
economy will sustain more damage
and recover more slowly

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%

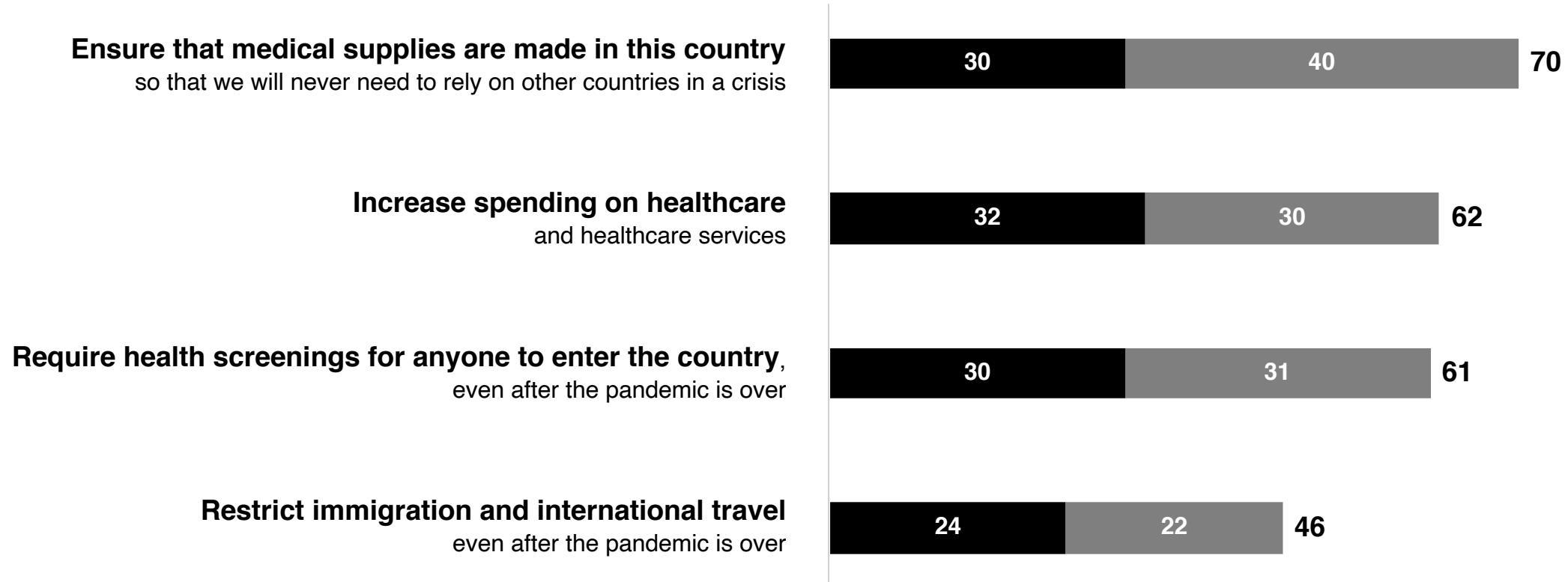
33%



GOVERNMENT MUST BUILD A MORE RESILIENT SYSTEM FOR THE FUTURE

Per cent in Canada who indicate that the below actions will maintain or increase their trust in government

■ Maintain ■ Increase



OPTIMISM FOR POSITIVE CHANGE IN LONG TERM

Which do you agree with more?

2020 Edelman Trust Barometer Spring Update. PER_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.

As horrible as it is, this pandemic will
lead to **valuable innovations**
and changes for the better
in how we live, work and treat each
other as people

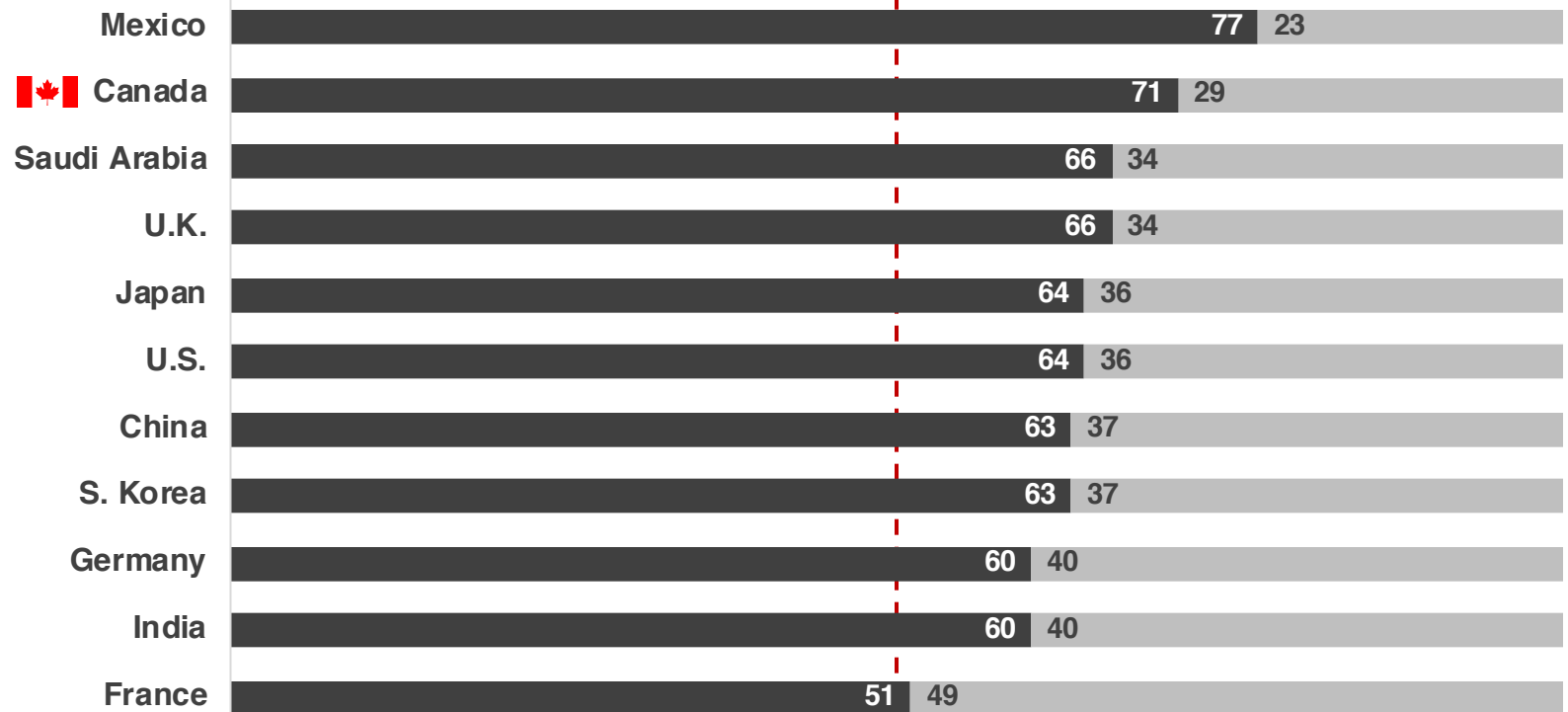
OR

**Nothing good will come from
this pandemic.** It will ruin lives,
further divide us as a society, and
drain resources that could have been
used to address other problems

64%

36%

Global 11



50%

KEY TAKEAWAYS

1.

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

2.

**Business and
government
must collaborate
on solutions**

3.

**Business must
recognize and
respond to
heightened
expectations**

4.

**CEOs must
demonstrate
public
leadership**

5.

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