

SPECIAL REPORT

# BRAND TRUST IN 2020

CANADA FINDINGS

Edelman Trust  
Barometer 2020

Edelman

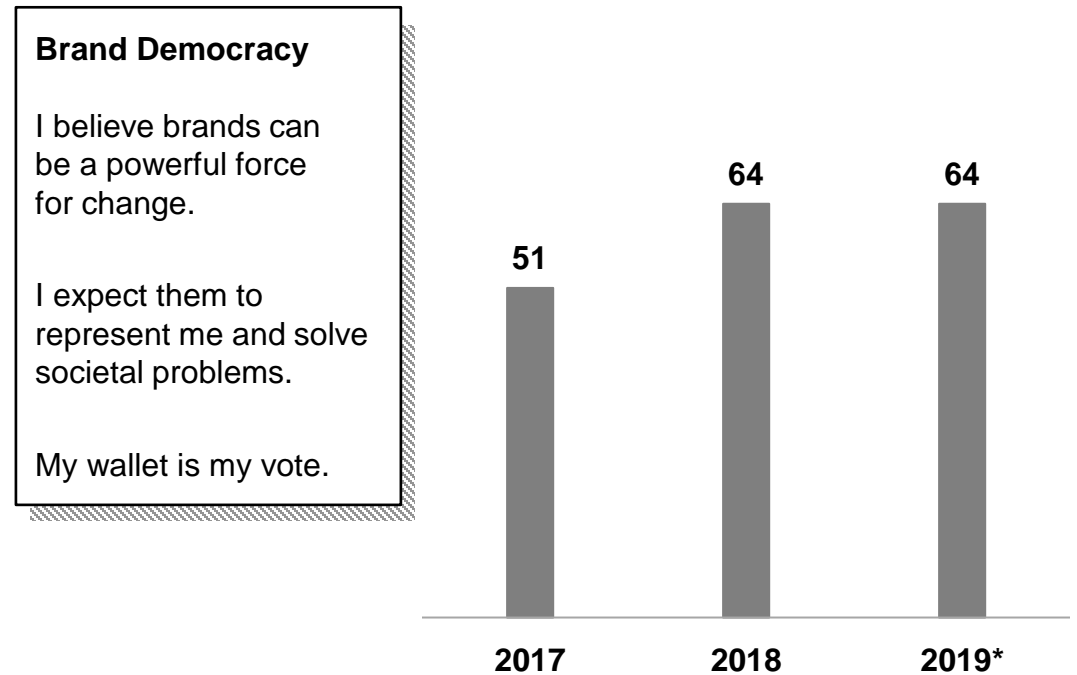
# 2019: BRAND TRUST RANKS AS TOP FIVE BUYING CRITERION

Percent who rate each as important in their buying decision

<b>Product attributes</b>	Quality	85
	Convenience	84
	Value	84
	Ingredients	82
	<b>I must be able to trust the brand to do what is right</b>	<b>81</b>
<b>Brand and company attributes</b>	Supply chain	79
	Customer before profits	78
	Good reviews	77
	Reputation	73
	Values	72
	Environmental impact	71

# BUYING ON BELIEF BECOMES THE NEW NORMAL

Percent who choose, switch, avoid or boycott a brand based on its stand on societal issues



2019 Edelman Trust Barometer Special Report: In Brands We Trust? Q104. Overall. When it comes to brands that you will or will not buy or use, categorize each of the following attributes based on whether it is a critical deal breaker, important to have, or merely a nice to have. 3-point scale; top 2 box, important. General population, 8-mkt avg.

2018 Edelman Earned Brand. Belief-driven buying segments. General population, 8-mkt avg. Belief-driven buyers choose, switch, avoid or boycott a brand based on its stand on societal issues.

\*2019 Edelman Trust Barometer Special Report: In Brands We Trust? Mobile Survey. Belief-driven buying segments. General population, 8-mkt avg.

# SPRING 2020: AMID PANDEMIC, SOCIETAL AND PERSONAL NEEDS CONVERGE

Percent who agree, in Canada

I want brands to shift money and resources to producing products that **help people meet pandemic-related challenges**

91%

- Brands must do this to earn or keep my trust
- I hope brands will do this, but there is no obligation



**Our country** will not make it through this crisis without **brands playing a critical role** in addressing the challenges we face

64%



# SPRING 2020: THERE'S A NEED FOR BRANDS TO SPEAK OUT AND ACT IN ADDRESSING RACIAL INJUSTICE

Percent who agree

It is important to earning/keeping my trust that brands take the steps necessary to **ensure that their organization is racially representative** of the country as a whole

Canada

65%

S. Africa	73
Germany	64
U.S.	64
France	58
UK	57

Brands **owe it to their employees to speak out** against systemic racism and racial injustice

Canada

57%

UK	56
U.S.	52
France	50
S. Africa	46
Germany	40

2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; top 3 box, important. Q3. Why do you believe that brands and companies should publicly speak out against systemic racism and racial injustice in your country [following the death of George Floyd and other recent racially motivated attacks on Blacks]? Pick all that apply. Question asked of those that said brands should publicly speak out against racism and injustice (Q2/1). General population, Canada, France, Germany, S. Africa, UK and U.S. \*Brackets in footer indicate language that was asked only in the U.S.



# BRAND TRUST IN 2020

## 11-market online survey

**Brazil, Canada, China, France, Germany, India, Japan, S. Africa, S. Korea, UK and U.S.**

- All data is nationally representative based on age, region, gender and additionally in the UK and U.S. by race/ethnicity
- 22,000+ respondents (2,000+ per market)

**Timing of Fieldwork: May 27 - June 5, 2020**

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## Report includes findings from two additional 2020 Trust Barometer Special Reports:

### Brand Trust and the Coronavirus Pandemic

12-market online survey

- Brazil, Canada, China, France, Germany, India, Italy, Japan, S. Africa, S. Korea, UK, and U.S.
- 12,000 respondents (1,000 per market)
- Timing of Fieldwork: March 23 - 26, 2020

### Brands and Racial Justice

- Online survey of 2,000+ U.S. respondents, fielded June 5 - 7, 2020
- 5-market online survey of 7,000+ total respondents (2,000+ each in Canada and UK; 1,000+ each in France, Germany and S. Africa), fielded June 12 - 18, 2020

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Margin of error based on unweighted sample sizes

- 11-market average data +/- 0.7% (n=22,000+)
- Market-specific data +/- 2.1% to 2.2% (n=2,000+)

**AMID SEISMIC  
SHOCKS,  
TRUST NOW  
MAKE OR  
BREAK**



# TRUST SECOND ONLY TO PRICE FOR PURCHASE AND LOYALTY

Percent who say they focus most on each brand attribute, in Canada

Brand attributes that are most top of mind when deciding whether to...	buy a new brand	become a loyal customer
Its price and affordability	72	69
<b>Whether you trust the company that owns the brand or brand that makes the product</b>	<b>55</b>	<b>47</b>
The reputation of the brand	55	43
Whether you trust the product to perform well and do everything you need it to do	47	45
How easy it is to find and buy the brand	46	43
How well it treats its customers	44	39
How well it treats the environment	37	33
If they get the ingredients and materials they use locally, sustainably and ethically	34	27
How well it treats its employees	33	32
How the brand has responded in the face of the COVID-19 pandemic	27	26



# MORE THAN HALF CHOOSE BRANDS ON TRUST

Percent who trust most of the brands they buy or use

Canada

# 56%

trust most of the brands they buy or use

S. Africa	58
Brazil	57
U.S.	57
UK	52
India	48
Germany	46
China	38
France	37
Japan	33
S. Korea	21

# A BIGGER NEED FOR BRAND TRUST TODAY THAN IN PAST

Percent who say being able to trust a brand today is more important than in the past

Canada

# 68%

say trusting a brand is *more* important today than in the past

India	89
Brazil	84
S. Africa	82
S. Korea	73
China	69
U.S.	67
France	65
UK	62
Germany	57
Japan	51





# A BIGGER NEED FOR TRUST— FOR BOTH PERSONAL AND SOCIETAL REASONS

Percent who say one or more element within each theme is a reason why brand trust has become more important, in Canada

# 82% net

## Because of Personal Vulnerability

- The pandemic has increased my **reliance on brands to keep me and my community safe**
- Brands are **collecting more of my personal information**
- The pandemic has increased my **reliance on brands to help me get through day-to-day challenges**
- I am **struggling financially** and can't afford to waste money
- I **rely more on brands to do important things** for me
- I **use brands to express my values** and don't want them to reflect badly on me

# 75% net

## Because of Brands' Societal Impact

- How brands produce and deliver products has a large **impact on the environment**
- Brands will have a huge impact on **how quickly and safely the economy recovers**
- Brands are more **involved in major social issues and societal problems**
- Technological innovations such as robotics and AI have the **potential to cause great harm** if misused

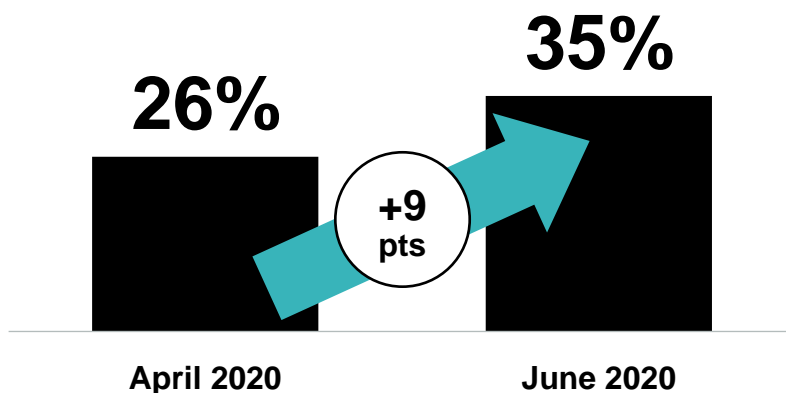
2020 Edelman Trust Barometer Special Report: Brand Trust. IMP\_WHY. You just indicated that it is more important to you to be able to trust the brands you buy today than in the past. Among the items listed below, please select those, if any, that best describe why it has become more important to you to be able to trust brands. Pick all that apply. Question asked of those that said it is more important to trust the brands they use today than in the past (IMP\_TRU/1). General population, Canada. "Personal Vulnerability" is a net of attributes 2-5, 8, and 9; "Societal Impact" is a net of attributes 1, 6, 7, and 10.

# PEOPLE ARE BUYING OR BOYCOTTING BRANDS OVER THEIR RESPONSE TO THE PANDEMIC

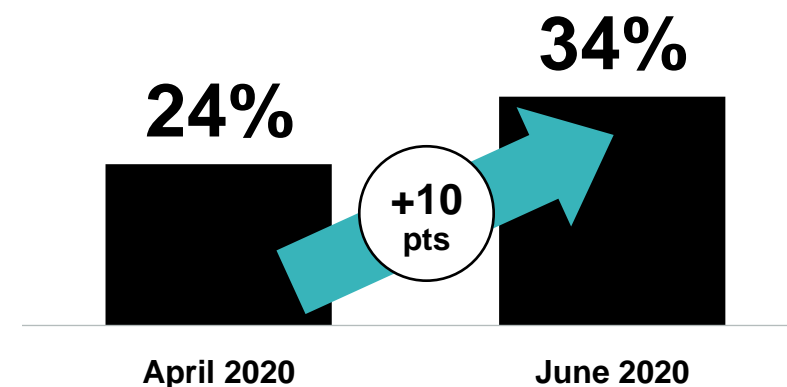
Percent who agree and change from April to June 2020, in Canada

● — 0 — ⊕ Change, Apr 2020 to Jun 2020

I have recently **started using a new brand** because of the innovative or compassionate way they have responded to the virus outbreak



I have convinced other people to **stop using a brand** that I felt was not acting appropriately in response to the pandemic

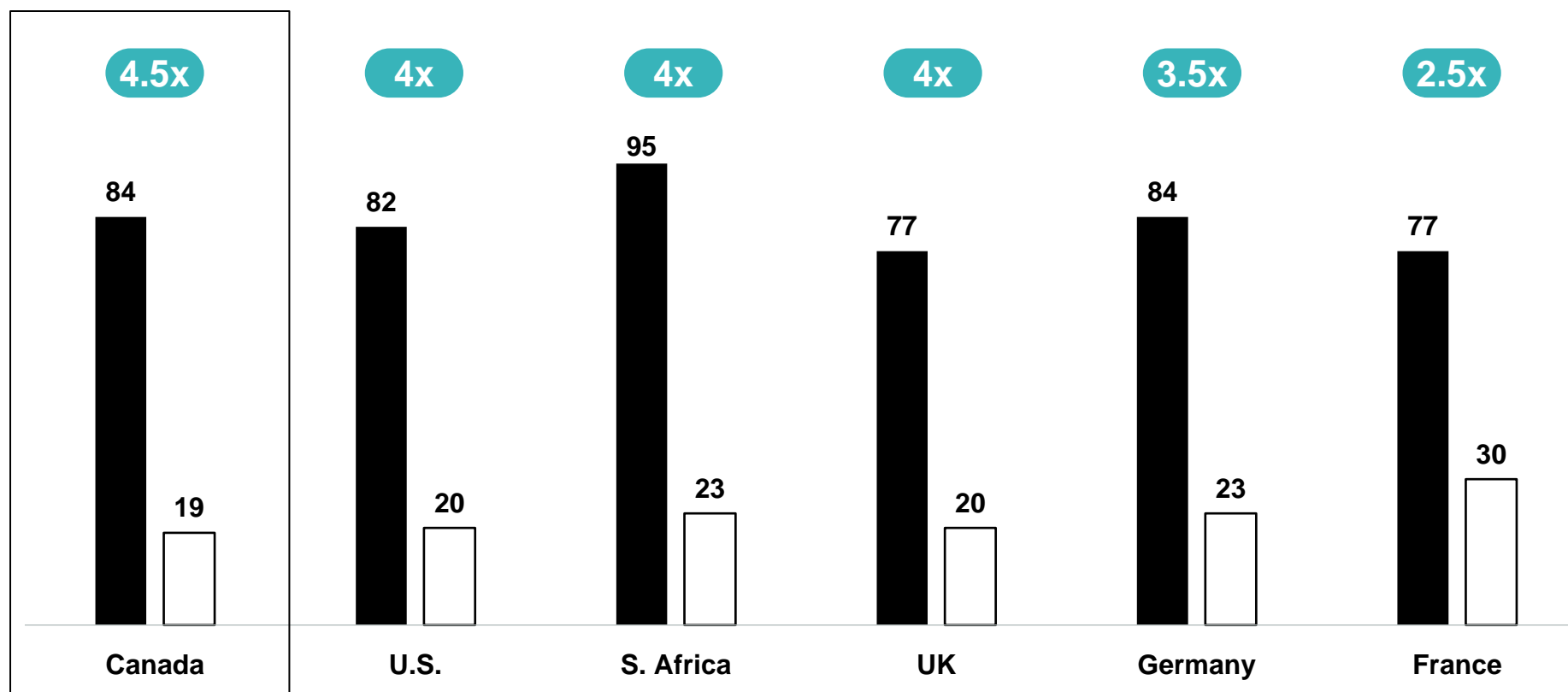


# BRANDS FAR MORE LIKELY TO GAIN TRUST THAN LOSE IT WHEN THEY TAKE ACTION

Percent who say brand actions in response to racial injustice would result in trust gain or loss

■ Brands would earn/keep my trust □ Brands would lose my trust

Difference, opportunity to gain trust vs risk of trust loss



2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; top 3 box, important; code 1, doing this would lose my trust. General population, Canada, France, Germany, S. Africa, UK, and U.S. Data shown is a net of attributes 2-9. \*Brackets in footer indicate language that was asked only in the U.S.

**TIME TO ACT:  
SOLVE PROBLEMS  
AND ADVOCATE  
FOR CHANGE**





# SOLVING PROBLEMS BIG AND SMALL MATTERS MOST FOR BRANDS TODAY

Percent who rate one or more elements within each theme as very or extremely important for brands to earn or keep their trust, in Canada

# 86% net

## Solve my problems

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- Be a dependable provider
- Be a protector
- Be a reliable source of information
- Be an innovator
- Be an educator
- Be a calming voice
- Be a connector

# 76% net

## Solve society's problems

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- Be a visionary
- Be a problem solver
- Be a positive force in shaping our culture
- Be a safety net
- Be a collaborator

# 64% net

## Enrich my life

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- Be a source of joy
- Be a personal inspiration
- Be a means of self-expression
- Be a source of entertainment/distraction



2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND\_KEEP. In general, how important is it to earning or keeping your trust that brands do each of the following? 5-point scale; top 2 box, important. General population, Canada. "Solve my problems" is a net of attributes 1-6 and 9; "Solve society's problems" is a net of attributes 12-16; "Enrich my life" is a net of attributes 7,8,10,11. Please see the Technical Appendix for full text for each role.

# CANADIANS WANT BRANDS TO SHAPE CULTURE AND TO SPEAK OUT

2020 Edelman Trust Barometer Special Report: Brand Trust in 2020

Percent who rate each as very or extremely important for brands to earn or keep their trust, in Canada

Being a positive force in **shaping our culture**, influencing acceptable behaviours and attitudes, and elevating those who are inspirational to others

55%

2020 Edelman Trust Barometer Special Report: Brands and Racial Justice

Percent who agree, in Canada

**Brands should publicly speak out on systemic racism** and racial injustice

64%



2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND\_KEEP. In general, how important is it to earning or keeping your trust that brands do each of the following? 5-point scale; top 2 box, important. General population, Canada.

2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q2. Do you believe that brands should publicly speak out against systemic racism and racial injustice? "Yes". General population, Canada.

# THEY WANT BRANDS TO REFLECT THE DIVERSITY OF OUR COMMUNITIES

Percent who say each brand response to racial injustice is important to earning or keeping their trust

**Reflect the full diversity** of the country in their communications

Make products **accessible and suitable to all** communities

Canada

**63%**

S. Africa	74
U.S.	63
Germany	61
France	56
UK	54

Canada

**63%**

S. Africa	74
Germany	61
U.S.	61
France	55
UK	54

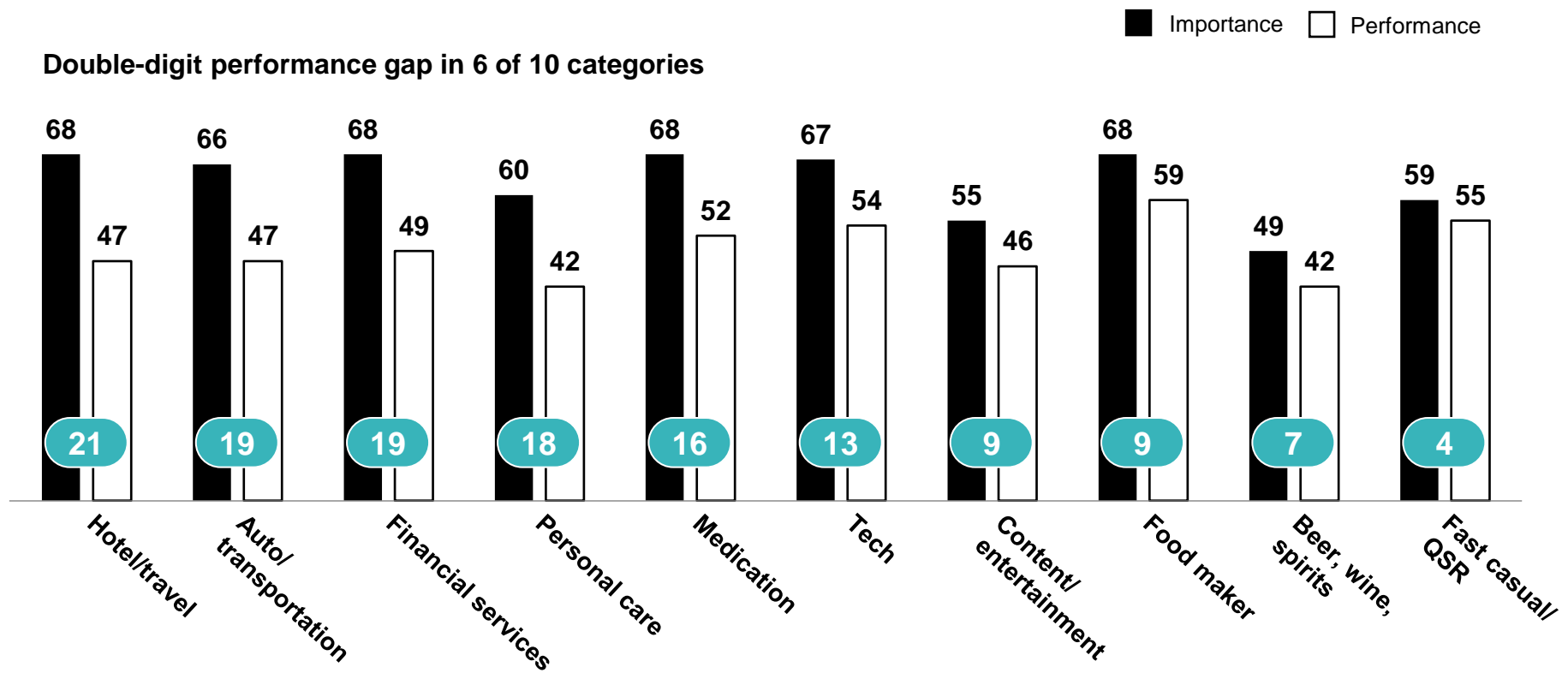
2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; code 4, moderately important; codes 5 and 6, very/extremely important. General population, Canada, France, Germany, S. Africa, UK, and U.S. \*Brackets in footer indicate language that was asked only in the U.S.

# IN THE FACE OF THE CURRENT CRISES, PEOPLE WANT BRANDS TO *PROTECT MORE*

Percent who rate this as very or extremely important for brands to earn or keep their trust; who say that brands are currently performing well on this; and the gap, in Canada

Be a protector doing everything it can to **ensure the safety and wellbeing** of their employees, customers and communities

Gap, importance minus performance



2020 Edelman Trust Barometer Special Report: Brand Trust. SEC\_KEEP. In general, how important is it to earning or keeping your trust that a(n) [insert sector] brand does each of the following? 5-point scale; top 2 box, important. Each sector asked of one-fifth of the sample. SEC\_PER. In the face of this COVID-19 pandemic and its economic consequences, how well do you feel [insert sector] brands are doing each of the following? For each item below, select the statement that best describes your perceptions of how brands are performing in fulfilling this role. 5-point scale; top 2 box, doing well. Each sector asked of one-fifth of the sample. General population, Canada, by sector.



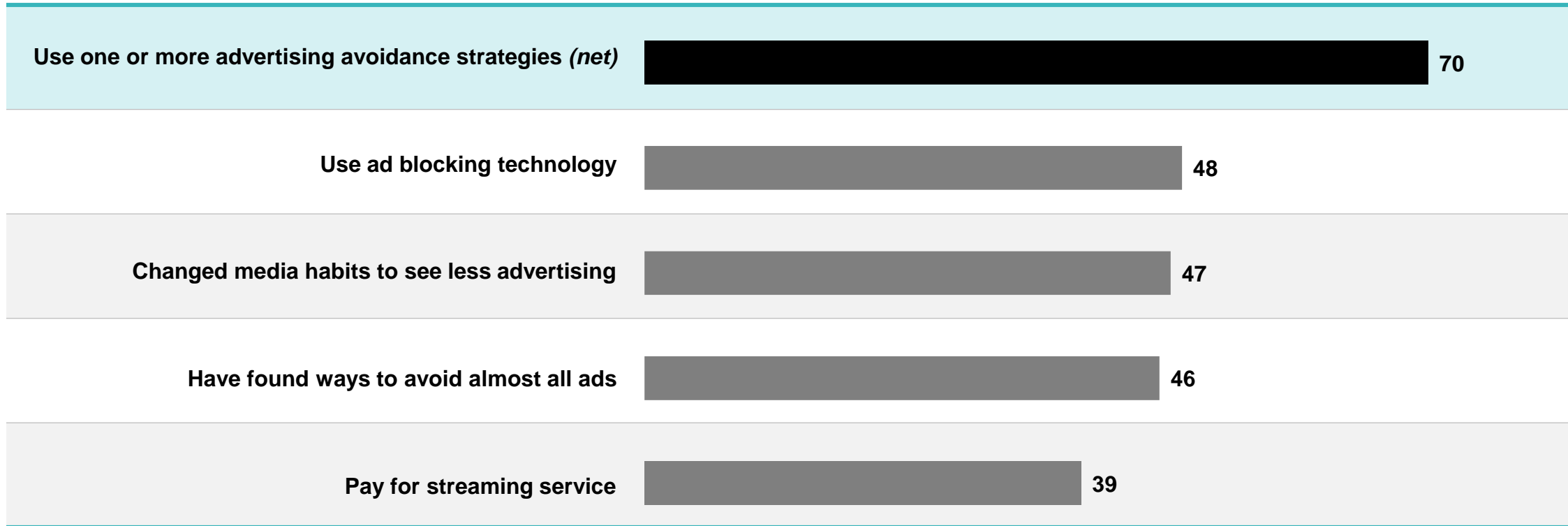


A person with a backpack walking through a crowd in a city street, viewed from behind. The scene is overlaid with a blue tint and a dark blue geometric shape in the top right corner. The text is in large, white, bold, sans-serif font.

**BRAND  
TRUST IS  
EARNED,  
NOT BOUGHT**

# 7 IN 10 AVOIDING ADVERTISING

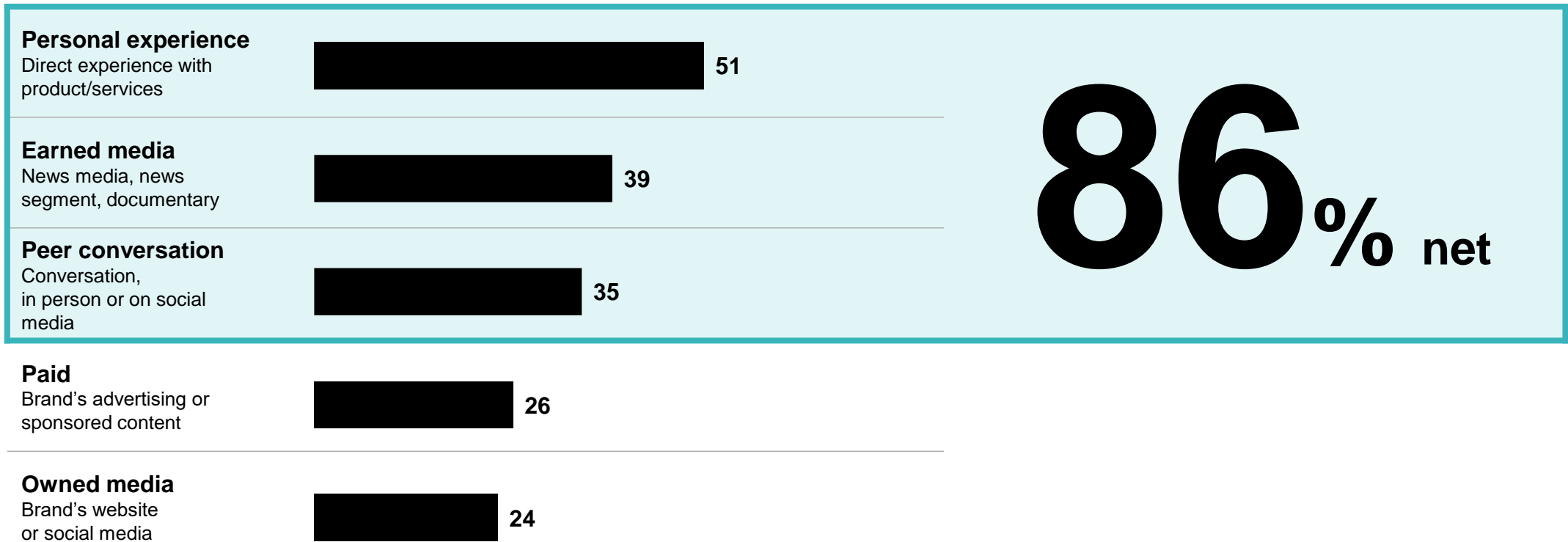
Percent who agree, in Canada



# EARNED IS THE BATTLEGROUND FOR TRUST

Percent who say each led to a gain of trust in a brand, in Canada

## What led to trust gain

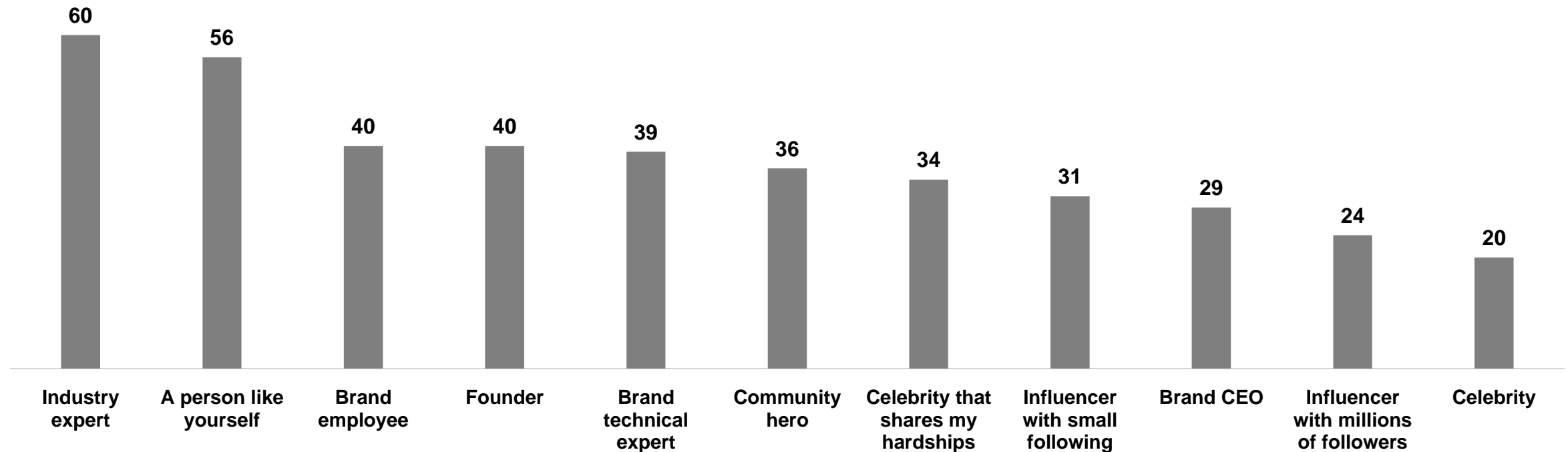


2020 Edelman Trust Barometer Special Report: Brand Trust. TRU\_GND\_SRC. What led you to gain trust in this particular brand? Pick all that apply. Question asked among those that gained trust in a specific brand within the past year (TRU\_GND/1). General population, Canada. "Earned media" is net of attributes 1-3; "Peer conversation" is a net of attributes 7 and 10; combined net is a net of "Personal experience", "Earned media" and "Peer conversation".

# INFLUENCE BUILT THROUGH AUTHORITY AND EMPATHY

Percent who say each is a credible spokesperson for brand trust, in Canada

Credible voices have a personal connection to the topic or issue





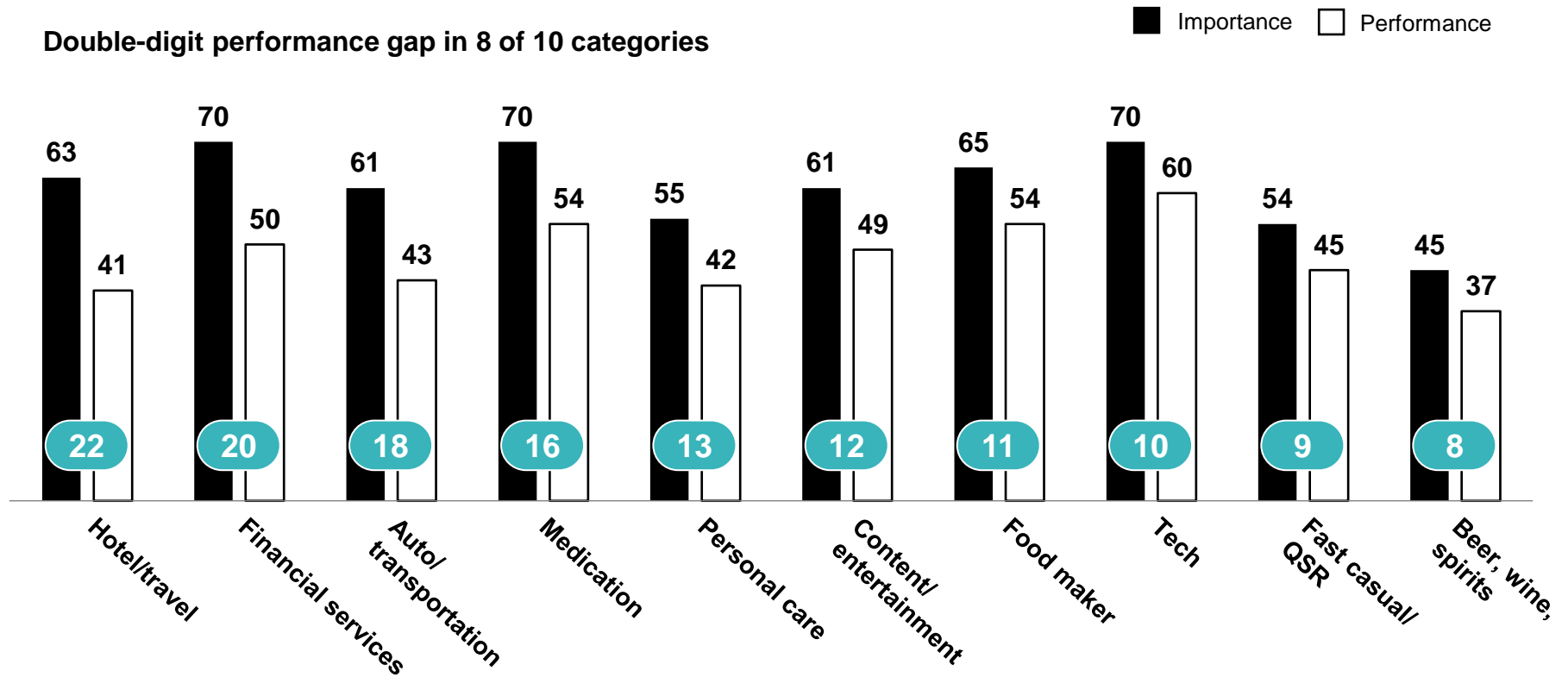
# IN THE FACE OF THE CURRENT CRISES, PEOPLE WANT BRANDS TO *DO MORE TO INFORM*

Percent who rate this as very or extremely important for brands to earn or keep their trust; who say that brands are currently performing well on this; and the gap, in Canada

Be a reliable source of information, **keeping people informed** about what they need to know to protect themselves and make good life decisions

Gap, importance minus performance

Double-digit performance gap in 8 of 10 categories



2020 Edelman Trust Barometer Special Report: Brand Trust. SEC\_KEEP. In general, how important is it to earning or keeping your trust that a(n) [insert sector] brand does each of the following? 5-point scale; top 2 box, important. Each sector asked of one-fifth of the sample. SEC\_PER. In the face of this COVID-19 pandemic and its economic consequences, how well do you feel [insert sector] brands are doing each of the following? For each item below, select the statement that best describes your perceptions of how brands are performing in fulfilling this role. 5-point scale; top 2 box, doing well. Each sector asked of one-fifth of the sample. General population, Canada, by sector.

# IN THE FACE OF SYSTEMIC RACISM, BRANDS MUST BACK UP WORDS WITH ACTIONS

Percent who agree

Brands and companies that issue a statement in support of racial equality **need to follow it up with concrete action to avoid being seen by me as exploitative** or as opportunists

Canada

63%

S. Africa	65
U.S.	63
UK	57
France	54
Germany	53

# TRUST DEFINES BRANDS



# MORE TRUST, MORE LOYALTY

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

Low trust in the brand

12%

High trust in the brand

75%

Difference between high and low trusters on brand loyalty

6.3x

- I will buy this brand **even if it is not the cheapest**
- This is **the only brand of this product that I will buy**
- If this brand put out a new product, I would be very interested in buying it and **would check it out immediately**

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU\_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. "Loyalty" is a net of attributes 1-3. General population, 11-mkt avg, by low trusters and high trusters at TRU\_BRAND. Please indicate how much you trust this brand using 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". 9-point scale; bottom 3 box, low trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND\_OE). Data shown is in aggregate across all four scenarios.

**Goodlife – Virtual Gym**

**THIS WEEK** **LIVE ON IGTV**

\*BY YOUR PARTICIPATION YOU ASSUME ALL RISKS ASSOCIATED WITH THESE WORKOUTS\*

**MONDAY**  
10:30AM EDT #BREATHECANADA WITH KIM LAVENDER  
11:30AM EDT MID-DAY BREAK - FUNCTIONAL STRENGTH & CORE WITH GARETH NOCK  
5:30PM EDT BODYPUMP™ WITH FRED KUNG

**TUESDAY**  
9:30AM EDT YOGA WITH TERRI DERMO  
11:00AM EDT FOAM ROLLING BASICS WITH DAN MCDONOGH  
11:30AM EDT MID-DAY BREAK - FUNCTIONAL STRENGTH WITH DAN MCDONOGH  
5:30PM EDT LES MILLS JAM™ WITH ASSATA MCKENZIE

**WEDNESDAY**  
11:30AM EDT MID-DAY BREAK - BOXING & LOADED MOVEMENT CIRCUIT WITH KIM LAVENDER  
5:00PM EDT FOAM ROLLING BASICS WITH DAN MCDONOGH  
5:30PM EDT FUNCTIONAL STRENGTH WITH DAN MCDONOGH

**THURSDAY**  
11:30AM EDT MID-DAY BREAK - GRIT™ CARDIO WITH KATHLEEN FURSEY  
5:30PM EDT LES MILLS BODYFLOW™ WITH MANDY DOLLEY  
6:30PM EDT LES MILLS BODYCOMBAT™ WITH INNO DELARMENTE

**FRIDAY**  
11:30AM EDT MID-DAY BREAK - CONDITIONING & YOGA WITH ASSATA MCKENZIE  
3:00PM EDT #BREATHECANADA WITH TERRI DERMO  
5:30PM EDT LES MILLS GRIT™ CARDIO WITH KATHLEEN FURSEY

**SATURDAY**  
9:00AM EDT HIIT WITH GARETH NOCK  
10:00AM EDT LESMILLS BODYCOMBAT/CX WORX™ COMBO WITH INNO DELARMENTE

GoodLife FITNESS | CANADIAN STRONG



# MORE TRUST, MORE ENGAGEMENT

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

Low trust in the brand

25%

High trust in the brand

60%

Difference between high and low trusters on brand engagement

2.4x

- I am comfortable **sharing my personal information** with this brand
- I **pay attention to this brand's advertising** and other marketing communications

## Ajinomoto – Take Out Hate

THE  
**TAKEOUT**

The #TakeOutHate campaign wants you to order Asian takeout and share your meal online



Jenny Yang poses for the #TakeOutHate campaign  
Photo: Ajinomoto

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU\_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. "Engagement" is a net of attributes 7 and 8. General population, 11-mkt avg, by low trusters and high trusters at TRU\_BRAND. Please indicate how much you trust this brand using 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". 9-point scale; bottom 3 box, low trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND\_OE). Data shown is in aggregate across all four scenarios.



# MORE TRUST, MORE ADVOCACY

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

Low trust in the brand

16%

High trust in the brand

78%

Difference between high and low trusters on brand advocacy

4.9x

- I am likely to **share or repost content about this brand**, or to post/share about my experiences with this brand
- If asked, I will **recommend this brand** to other people
- I **defend this brand** if I ever hear someone criticizing it

## DOVE – The CROWN Act



Help us reach 100,000 signatures to end hair discrimination



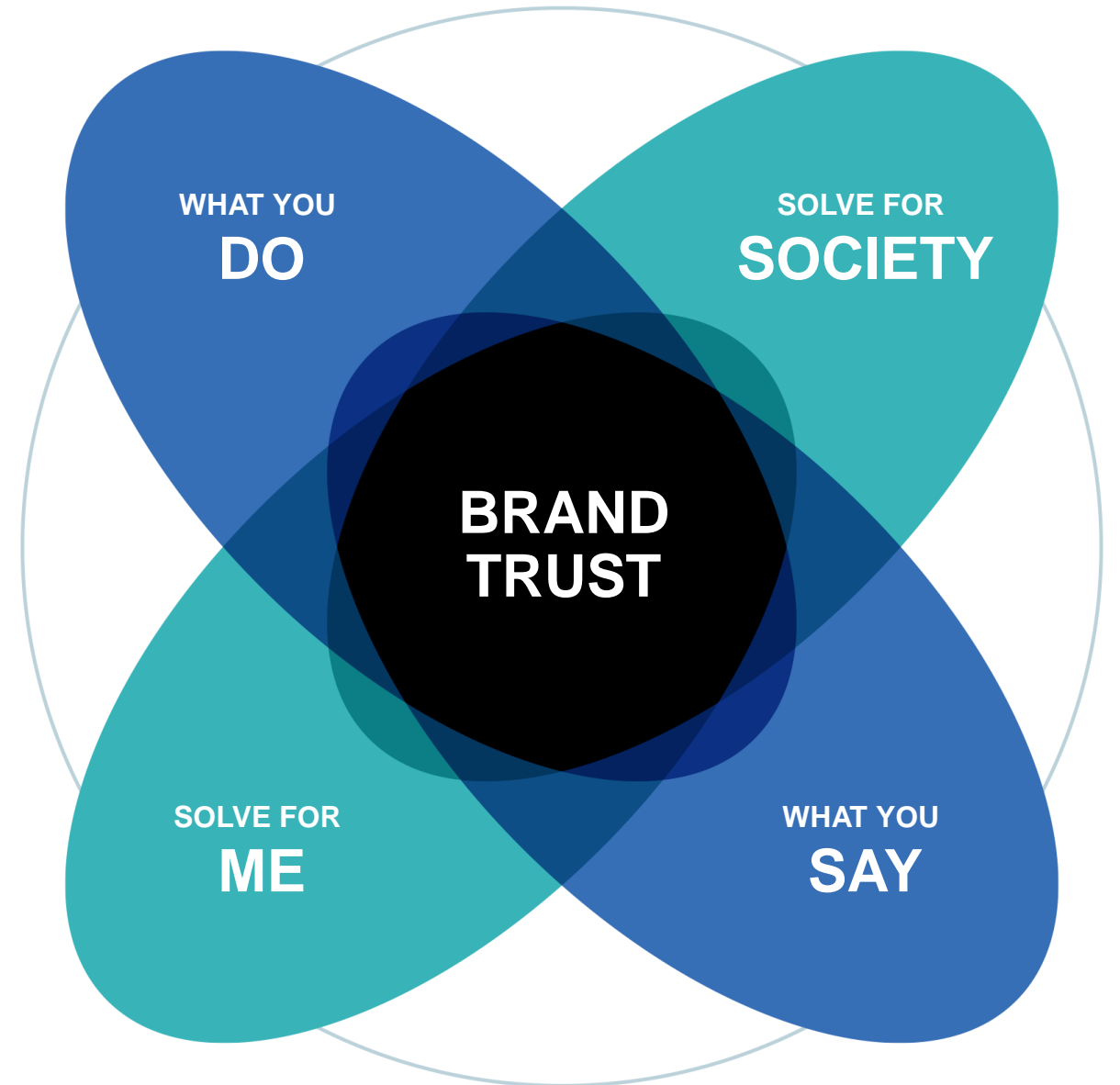
Creating a **R**espectful and **O**pen **W**orld for **N**atural Hair.

**Sign The CROWN Act petition today!**

[TheCROWNAct.com](https://TheCROWNAct.com)

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU\_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. "Advocacy" is a net of attributes 4-6. General population, 11-mkt avg, by low trusters and high trusters at TRU\_BRAND. Please indicate how much you trust this brand using 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". 9-point scale; bottom 3 box, low trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND\_OE). Data shown is in aggregate across all four scenarios.

**TRUSTED  
BRANDS LIVE AT  
THE INTERSECTION  
OF PERSONAL AND  
SOCIETAL, WORDS  
AND ACTIONS**



# BRAND TRUST IN 2020: TRUST DEFINES BRANDS

1

Amid seismic shocks, trust is the make-or-break difference for brands

2

It is time for brands to act: solve problems and advocate for change

3

Brand trust is earned—through both words and actions

4

Trust builds loyalty, engagement and advocacy



**Edelman Trust  
Barometer 2020** |  **Edelman**