Special Report: Brand Trust and the Coronavirus Pandemic

Edelman Trust Barometer 2020
A NEED FOR BRANDS TO DO THE RIGHT THING

Percent who say this is a deal breaker or deciding factor in their brand buying decision

I must be able to trust the brand to do what is right

81%

A NEED FOR BUSINESS AND EMPLOYERS TO STEP UP

Percent who say

Businesses have a responsibility to ensure their employees are protected from the virus in the workplace and do not spread the virus into the community

78%

I would like my employer to share information about the coronavirus at least daily

63%
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong></td>
<td><strong>2.</strong></td>
</tr>
<tr>
<td><strong>Show up and do your part</strong></td>
<td><strong>Don’t act alone</strong></td>
</tr>
<tr>
<td>Brands have a vital role to play. Now is not the time to disappear, but to show up and use all your resources and creativity to make a difference.</td>
<td>There is strength in collaboration. To truly help people during this crisis requires a joining of forces with others, most critically government.</td>
</tr>
<tr>
<td><strong>3.</strong></td>
<td><strong>4.</strong></td>
</tr>
<tr>
<td><strong>Solve, don’t sell</strong></td>
<td><strong>Communicate with emotion, compassion and facts</strong></td>
</tr>
<tr>
<td>Brands should focus all efforts on finding appropriate and meaningful solutions to the problems people are facing today.</td>
<td>People are reassured by positive brand actions and commitments. Communicate with empathy to help both inform and calm.</td>
</tr>
</tbody>
</table>
Brand Trust and the Coronavirus Pandemic

12-market online Survey

- Brazil, Canada, China, France, Germany, India, Italy, Japan, S. Africa, S. Korea, U.K. and U.S.
- All data is nationally representative based on age, region and gender
- 12,000 respondents (1,000 per market)

Timing of Fieldwork: March 23 – March 26, 2020

Margin of error

- 12-market global data margin of error: +/- 0.9% (N=12,000)
- Market-specific data margin of error: +/- 3.1 (N=1,000)
BRANDS ARE CRITICAL TO WINNING THE FIGHT AGAINST THE PANDEMIC

Percent who agree

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

- Overall, I think **brands and companies are responding more quickly and effectively** to the pandemic than the government is

62%  
55%

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
1 IN 3 HAVE ALREADY PUNISHED BRANDS THAT DID NOT RESPOND WELL

Percent who agree

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

33%

Global 12

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
FOCUS ON SOLUTIONS, NOT SELLING
PROTECT EMPLOYEES AT ALL COSTS

Percent who want this from brands

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

Brands must do everything they can to **protect the well-being and financial security of their employees and their suppliers**, even if it means suffering big financial losses until the pandemic ends.

90%

Global 12

<table>
<thead>
<tr>
<th>Country</th>
<th>Brazil</th>
<th>S. Africa</th>
<th>Italy</th>
<th>France</th>
<th>U.K.</th>
<th>Germany</th>
<th>S. Korea</th>
<th>Canada</th>
<th>China</th>
<th>U.S.</th>
<th>Japan</th>
<th>India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must do</td>
<td>93</td>
<td>93</td>
<td>92</td>
<td>91</td>
<td>90</td>
<td>90</td>
<td>89</td>
<td>89</td>
<td>89</td>
<td>87</td>
<td>86</td>
<td>86</td>
</tr>
<tr>
<td>I hope</td>
<td>29</td>
<td>37</td>
<td>34</td>
<td>32</td>
<td>38</td>
<td>39</td>
<td>40</td>
<td>47</td>
<td>45</td>
<td>49</td>
<td>55</td>
<td></td>
</tr>
</tbody>
</table>

Global 12: 52 must do, 38 I hope.
### PRODUCE PRODUCTS THAT CAN HELP

**Percent who want each from brands**

<table>
<thead>
<tr>
<th>Option</th>
<th>Percent Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brands must do this to earn or keep my trust</td>
<td>44%</td>
</tr>
<tr>
<td>I hope brands will do this, but there is no obligation</td>
<td>45%</td>
</tr>
<tr>
<td>Shift to producing products that help people meet the challenges</td>
<td>89%</td>
</tr>
<tr>
<td>Offer free or lower-priced products to health workers, high-risk individuals and those whose jobs have been affected</td>
<td>89%</td>
</tr>
<tr>
<td>I am just not paying attention to new products right now unless they are designed to help me with my pandemic-related life challenges</td>
<td>54%</td>
</tr>
</tbody>
</table>

**Percent who agree**

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q4. In the face of this coronavirus outbreak, what do you expect brands to do? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Q6. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Questions shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
PARTNER WITH GOVERNMENT TO FILL THE GAPS
Percent who want each from brands

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

### Partner with government and relief agencies to address the crisis

- **90%**

### Be a safety net, stepping in where they are needed and able, to fill gaps in the government’s response to the virus

- **86%**

---

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q4. In the face of this coronavirus outbreak, what do you expect brands to do? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Q3. In the face of this coronavirus outbreak, what roles do you expect brands to play? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Questions shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
SERVE AS INFORMATION SOURCE

Percent who want brands to play this role

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

Be a **reliable news source**, keeping people informed about the virus and the progress being made in the fight against it

84%

Global 12

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q3. In the face of this coronavirus outbreak, what roles do you expect brands to play? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
USE YOUR BRAND POWER TO EDUCATE
Percent who want brands to play this role

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

Be an educator, offering people instructional information about the virus and how to protect themselves from it

85%

Global 12

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q3. In the face of this coronavirus outbreak, what roles do you expect brands to play? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
BRING PEOPLE TOGETHER
Percent who want each from brands

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

Connect people and help them stay **emotionally close**

Use social media channels to facilitate a sense of community and offer social support to people

83%

51%

32%

84%

50%

34%

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q3. In the face of this coronavirus outbreak, what roles do you expect brands to play? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Q5. In the face of this coronavirus outbreak, how do you expect brands to react when it comes to the nature and tone of their communications with the public? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Questions shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
COMMUNICATE WITH EMOTION, COMPASSION AND FACTS
COMMUNICATE HOW YOU’RE HELPING

Percent who want each from brands

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

- Keep the public fully informed regarding how the **brand is supporting and protecting their employees and customers**
  - 89%
  - 47%
  - 42%

- Keep the public fully informed regarding **changes in how the brand is operating** and in how to gain access to its products and services
  - 88%
  - 46%
  - 42%

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q5. In the face of this coronavirus outbreak, how do you expect brands to react when it comes to the nature and tone of their communications with the public? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
COMMUNICATIONS ABOUT BRAND RESPONSE TO PANDEMIC PROVIDING COMFORT AND REASSURANCE

Percent who agree

- Hearing from brands I use about what they are doing to respond to the pandemic is **comforting and reassuring to me**
- All of the communications I am getting from brands about the virus are just **adding to my anxiety and concern**

---

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q6. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
SHOW THAT YOU CARE

Percent who want this from brands

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

Issue public statements expressing empathy and support for those most affected by the pandemic

Global 12

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q5. In the face of this coronavirus outbreak, how do you expect brands to react when it comes to the nature and tone of their communications with the public? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
**FOCUS YOUR MESSAGES ON SOLUTIONS**

Percent who want each from brands

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

Focus advertising on how the products and services can **help people cope with pandemic-related life challenges**

84%  
36  
48

Only talk about the products in ways that **show they are aware of the crisis** and the impact it is having on people’s lives

77%  
31  
46

---

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q5. In the face of this coronavirus outbreak, how do you expect brands to react when it comes to the nature and tone of their communications with the public? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
MOST TRUSTED SPOKESPEOPLE: DOCTORS AND HEALTH AUTHORITIES

Percent who believe each is a credible spokesperson on issues related to the virus and the brand’s response

- A doctor or health authority: 78%
- Brand’s technical expert: 48%
- The brand’s CEO: 45%
- A person like yourself: 44%
- Founder of the brand: 43%
- Brand’s employee: 34%
- A small influencer: 32%
- A well-known influencer: 28%
- A celebrity: 26%

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q10. Below is a list of people. If a brand were to use each as their spokesperson on issues related to the virus and how the brand was responding, how credible would they be? 4-point scale; top 2 box, credible. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
BE CAUTIOUS WITH HUMOR AND ESCAPISM

Percent who want each from brands

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

Stop any advertising or marketing that is humorous or too lighthearted in tone

<table>
<thead>
<tr>
<th>57%</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
</tr>
</tbody>
</table>

Brands should avoid escapist advertising showing people gathered together using their products and having a good time

| 42% |

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q5. In the face of this coronavirus outbreak, how do you expect brands to react when it comes to the nature and tone of their communications with the public? 3-point scale; code 1, brands must do this; code 2, I hope brands will do this; code 3, brands should avoid doing this. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
## USE TRADITIONAL MEDIA, EMAILS AND OWNED CHANNELS TO COMMUNICATE ABOUT YOUR RESPONSE TO THE PANDEMIC

Percent who prefer brands use each channel to communicate about the virus and their response to the pandemic

<table>
<thead>
<tr>
<th>Channel</th>
<th>India</th>
<th>Japan</th>
<th>S. Africa</th>
<th>Brazil</th>
<th>S. Korea</th>
<th>China</th>
<th>Italy</th>
<th>Canada</th>
<th>Germany</th>
<th>U.S.</th>
<th>France</th>
<th>U.K.</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV, radio or newspapers</td>
<td>45</td>
<td>66</td>
<td>54</td>
<td>54</td>
<td>49</td>
<td>46</td>
<td>43</td>
<td>39</td>
<td>39</td>
<td>34</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>42</td>
<td>55</td>
<td>27</td>
<td>54</td>
<td>40</td>
<td>22</td>
<td>28</td>
<td>34</td>
<td>54</td>
<td>50</td>
<td>46</td>
<td>64</td>
</tr>
<tr>
<td>The brand’s website</td>
<td>33</td>
<td>49</td>
<td>31</td>
<td>39</td>
<td>40</td>
<td>15</td>
<td>47</td>
<td>29</td>
<td>36</td>
<td>28</td>
<td>28</td>
<td>34</td>
</tr>
<tr>
<td>Facebook</td>
<td>31</td>
<td>65</td>
<td>9</td>
<td>48</td>
<td>49</td>
<td>19</td>
<td>18</td>
<td>38</td>
<td>28</td>
<td>26</td>
<td>22</td>
<td>25</td>
</tr>
<tr>
<td>Instagram</td>
<td>21</td>
<td>47</td>
<td>9</td>
<td>27</td>
<td>46</td>
<td>17</td>
<td>17</td>
<td>19</td>
<td>16</td>
<td>12</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Twitter</td>
<td>19</td>
<td>47</td>
<td>20</td>
<td>28</td>
<td>28</td>
<td>9</td>
<td>19</td>
<td>13</td>
<td>15</td>
<td>7</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Texts</td>
<td>18</td>
<td>37</td>
<td>8</td>
<td>28</td>
<td>12</td>
<td>31</td>
<td>30</td>
<td>8</td>
<td>8</td>
<td>22</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Streaming videos</td>
<td>17</td>
<td>46</td>
<td>6</td>
<td>19</td>
<td>22</td>
<td>14</td>
<td>45</td>
<td>12</td>
<td>9</td>
<td>6</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>Regular mail</td>
<td>11</td>
<td>30</td>
<td>3</td>
<td>16</td>
<td>5</td>
<td>14</td>
<td>45</td>
<td>12</td>
<td>14</td>
<td>5</td>
<td>12</td>
<td>6</td>
</tr>
</tbody>
</table>

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q8. When communicating with you about the virus and their response to the pandemic, what methods would you prefer brands to use? Pick all that apply. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
EARNED MEDIA BELIEVED MOST READILY
Percent who report they believe coronavirus information from each source

<table>
<thead>
<tr>
<th>Source</th>
<th>National media</th>
<th>Local media</th>
<th>Brand website</th>
<th>Brand advertising</th>
<th>Brand social media</th>
<th>Product reviews</th>
<th>Influencer</th>
<th>Social media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once or twice</td>
<td>46</td>
<td>46</td>
<td>42</td>
<td>40</td>
<td>37</td>
<td>35</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>If I see it here, I will automatically assume it is true</td>
<td>18</td>
<td>16</td>
<td>17</td>
<td>13</td>
<td>14</td>
<td>11</td>
<td>10</td>
<td>8</td>
</tr>
</tbody>
</table>

I will never believe it is true if this is the only place I see it

| Source                  | 8          | 9          | 14         | 17         | 20        | 20        | 31         | 27         |

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q9. When you see a new piece of information about a brand in each of the following places, how many times do you need to see it or hear repeated before you believe it is really true? Question shown to those who have heard of the virus (Q1/1). “Once or twice” is a sum of codes 2 and 3. 12-mkt avg. Data collected between March 23 and March 26, 2020.
IMPACT FOR BRANDS
PEOPLE TURNING TO BRANDS THEY TRUST

Percent who agree

In this time of crisis, I am turning more and more to the brands that I am absolutely sure that I can trust

60%

Global 12

89% China
77% India
68% Brazil
67% S. Africa
62% Italy
57% Canada
56% S. Korea
55% U.S.
52% U.K.
51% France
48% Germany
38% Japan

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
37%

BRANDS’ RESPONSE TO PANDEMIC ALREADY INFLUENCING PURCHASE

Percent who agree

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

Global 12

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
BRANDS’ RESPONSE TO PANDEMIC WILL INFLUENCE FUTURE PURCHASE

Percent who agree

How well a brand responds to this crisis will have a huge impact on my likelihood to buy that brand in the future

65%

Global 12

<table>
<thead>
<tr>
<th>Country</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>88</td>
</tr>
<tr>
<td>India</td>
<td>79</td>
</tr>
<tr>
<td>Brazil</td>
<td>76</td>
</tr>
<tr>
<td>S. Korea</td>
<td>73</td>
</tr>
<tr>
<td>S. Africa</td>
<td>70</td>
</tr>
<tr>
<td>Italy</td>
<td>66</td>
</tr>
<tr>
<td>Canada</td>
<td>65</td>
</tr>
<tr>
<td>U.K.</td>
<td>64</td>
</tr>
<tr>
<td>U.S.</td>
<td>61</td>
</tr>
<tr>
<td>France</td>
<td>50</td>
</tr>
<tr>
<td>Germany</td>
<td>45</td>
</tr>
<tr>
<td>Japan</td>
<td>45</td>
</tr>
</tbody>
</table>

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.
FUTURE OF BRAND TRUST AT RISK

Percent who agree

Brands and companies that I see placing their profits before people during this crisis will lose my trust forever

71%

Global 12

<table>
<thead>
<tr>
<th>Country</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>86</td>
</tr>
<tr>
<td>Brazil</td>
<td>75</td>
</tr>
<tr>
<td>S. Korea</td>
<td>75</td>
</tr>
<tr>
<td>U.K.</td>
<td>74</td>
</tr>
<tr>
<td>India</td>
<td>73</td>
</tr>
<tr>
<td>S. Africa</td>
<td>72</td>
</tr>
<tr>
<td>Canada</td>
<td>71</td>
</tr>
<tr>
<td>Italy</td>
<td>69</td>
</tr>
<tr>
<td>U.S.</td>
<td>69</td>
</tr>
<tr>
<td>France</td>
<td>64</td>
</tr>
<tr>
<td>Japan</td>
<td>64</td>
</tr>
<tr>
<td>Germany</td>
<td>63</td>
</tr>
</tbody>
</table>
# MAINTAINING BRAND TRUST DURING THE CORONAVIRUS

<table>
<thead>
<tr>
<th>1.</th>
<th>Show up and do your part</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brands have a vital role to play. Now is not the time to disappear, but to show up and use all your resources and creativity to make a difference.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2.</th>
<th>Don’t act alone</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is strength in collaboration. To truly help people during this crisis requires a joining of forces with others, most critically government.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3.</th>
<th>Solve, don’t sell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brands should focus all efforts on finding appropriate and meaningful solutions to the problems people are facing today.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.</th>
<th>Communicate with emotion, compassion and facts</th>
</tr>
</thead>
<tbody>
<tr>
<td>People are reassured by positive brand actions and commitments. Communicate with empathy to help both inform and calm.</td>
<td></td>
</tr>
</tbody>
</table>