

Spring Update:  
Trust and the  
Covid-19 Pandemic

## 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+).

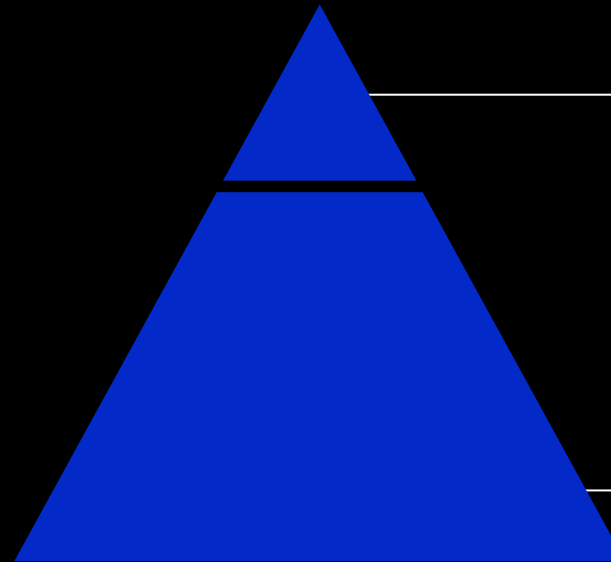
Market-specific data margin of error: General population +/- 2.8% (N=1,200), informed public +/- 9.8% (N=100), mass population +/- 2.9% to 3.7% (N=min 691, varies by market).

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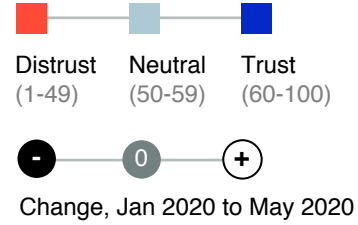
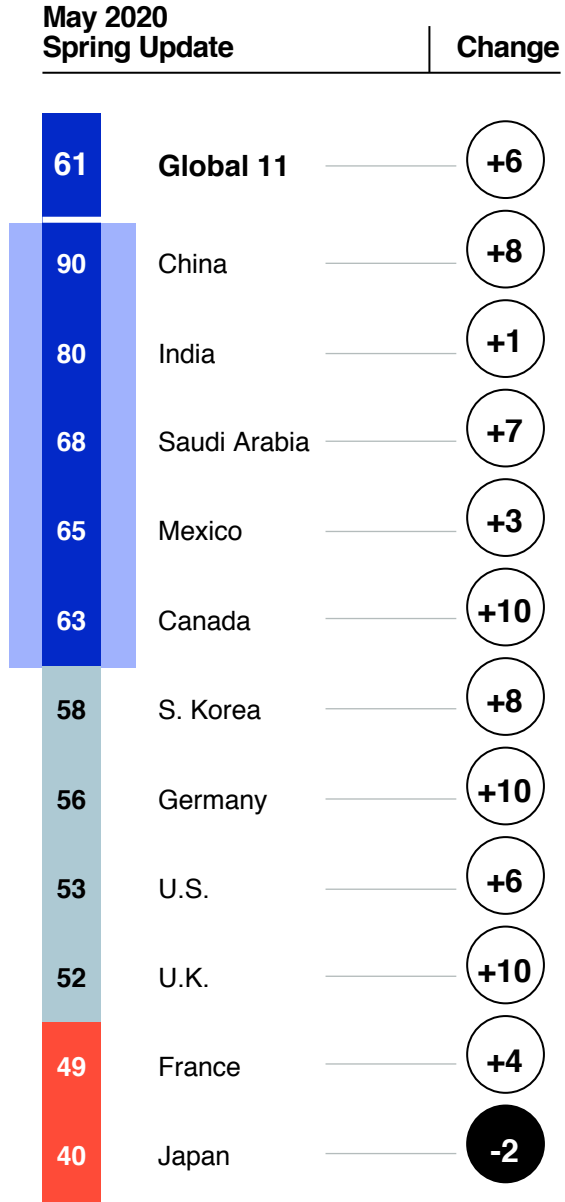
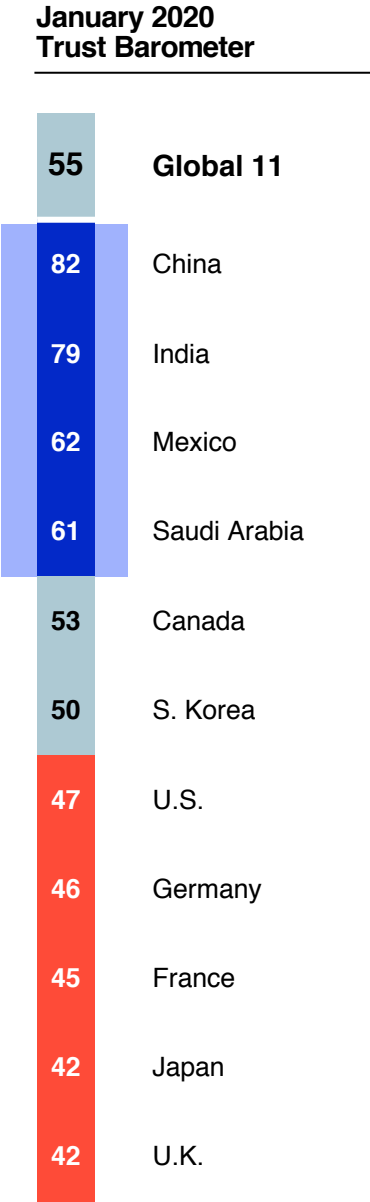
# A RECORD RISE IN TRUST; TRUST INDEX AT ALL-TIME HIGH

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

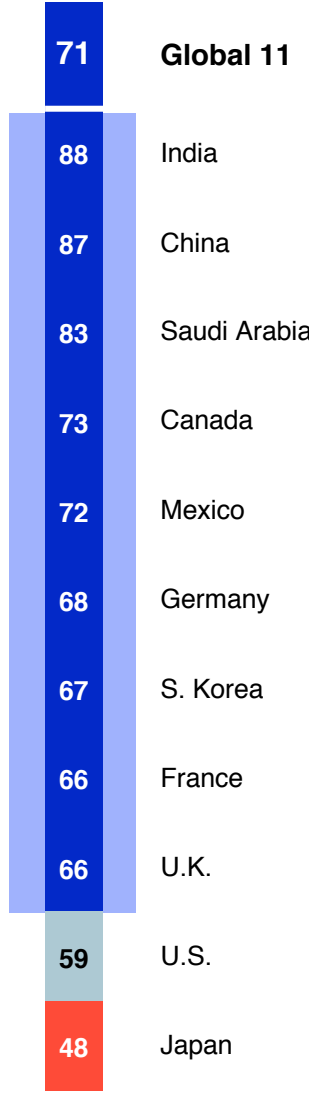
Trust Index

Informed public 13 points more trusting than the mass population

Double-digit trust inequality in 8 of 11 markets measured

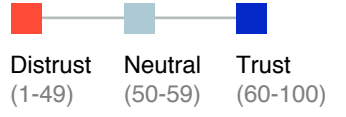
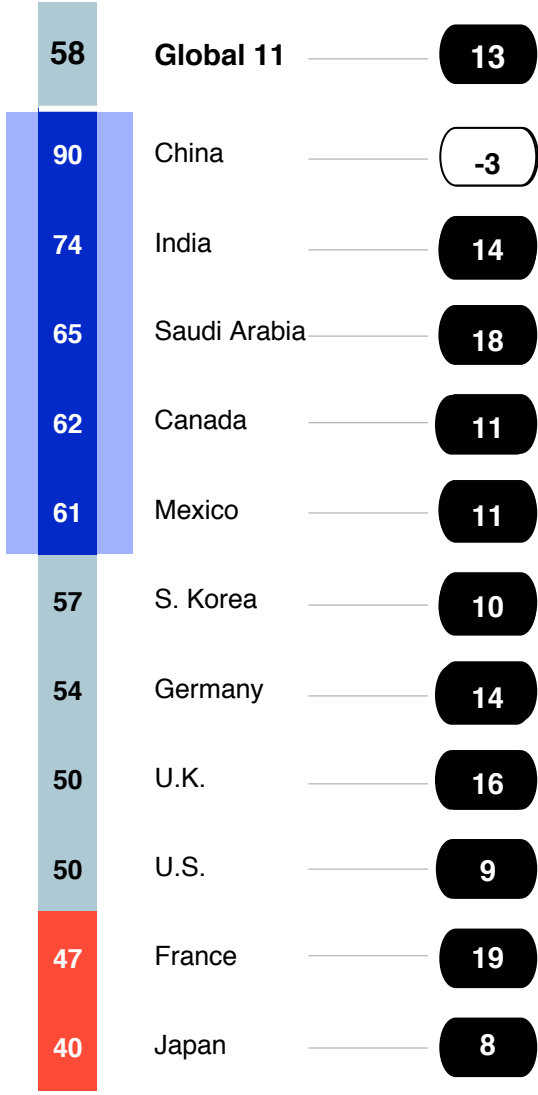
**2020 Edelman Trust Barometer Spring Update.** The Trust Index is the average percent trust in NGOs, business, government and media. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. Informed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

△ 2020 Spring Update  
Informed public



△ 2020 Spring Update  
Mass population

Trust gap



13

-3

14

18

11

11

10

14

16

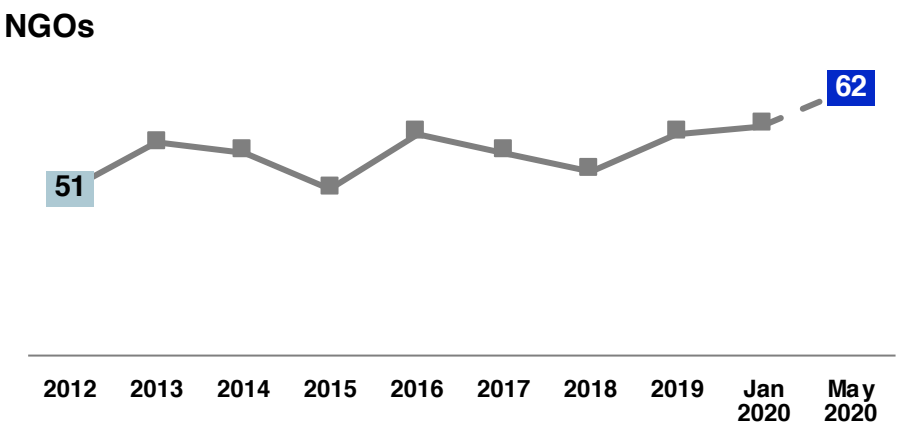
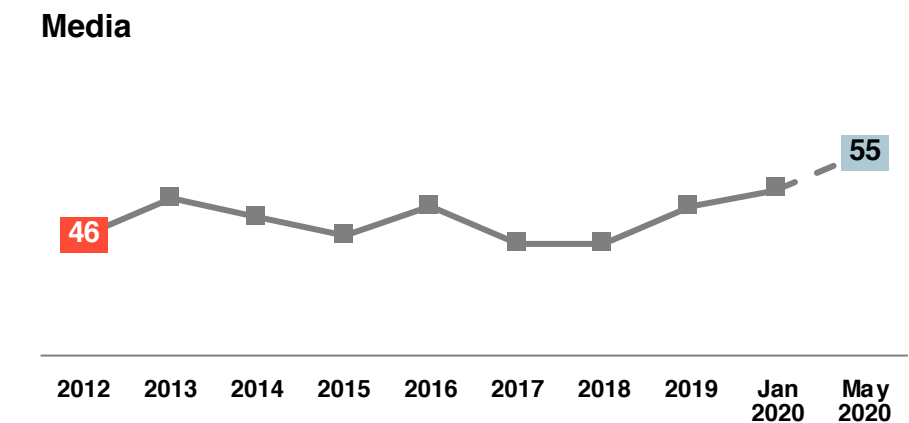
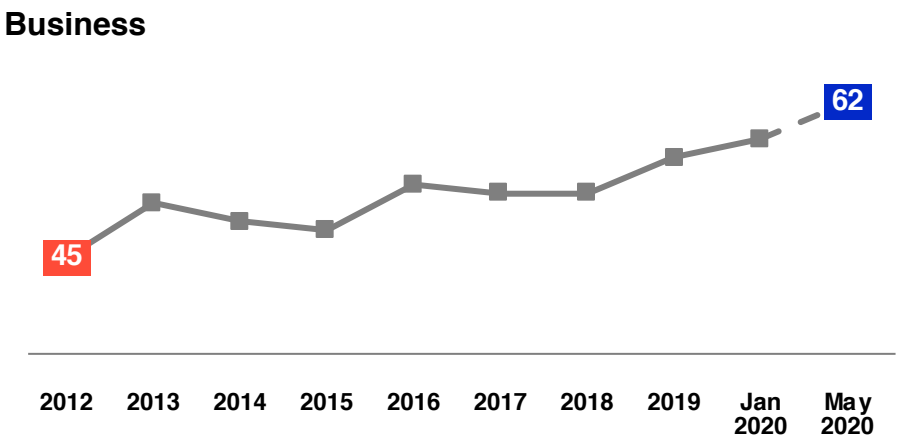
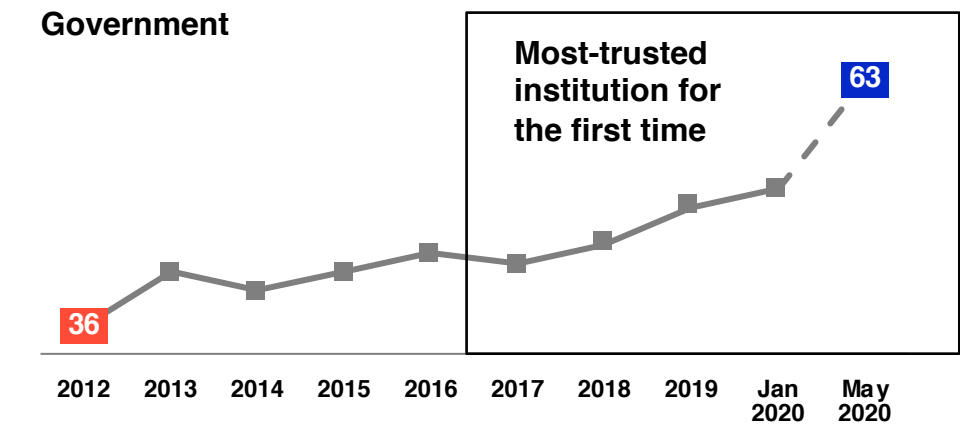
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19

8

# RECORD HIGHS FOR ALL INSTITUTIONS

Percent trust (10-market average)



2020 Edelman Trust Barometer Spring Update. 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, 10-mkt avg.

# SUSTAINABLE RISE OR TRUST BUBBLE?

## LARGE TRUST GAINS OFTEN QUICKLY LOST

Trust loss one year after double-digit gain

No trust loss one year after large gain

Double-digit gains in trust, and change one year later

280 measured changes in trust,  
across 7 years of data for 4 institutions  
and 10 markets measured

**17 double-digit trust gains**  
from 2012 to 2020  
(6% incidence rate)

**13 of 17 followed by a trust loss**  
one year later (76%)

Year	Market	Institution	Trust Gain	Change, 1 Year Later
2016	China	Business	12	-3
2016	China	NGOs	17	-10
2013	France	Business	10	-11
2016	France	Business	16	4
2013	Germany	Government	11	1
2013	Germany	Media	12	0
2013	India	Government	12	-4
2013	India	Media	10	-6
2015	India	Government	17	-3
2017	India	Government	10	-5
2014	Japan	Government	12	-3
2016	Mexico	Business	12	-9
2016	Mexico	Media	10	-11
2016	Mexico	NGOs	11	-3
2018	S. Korea	Government	17	3
2013	U.K.	Business	11	-4
2013	U.K.	NGOs	10	-1

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. General population, 10-mkt avg. Data shown is an analysis of 280 measured changes in trust across 4 institutions and 10 markets, based on general population data collected between 2012 and 2020.

# SOCIETAL FEARS FURTHER STRAIN THE SYSTEM



# NEITHER GOVERNMENT NOR BUSINESS KEEPING ME SAFE

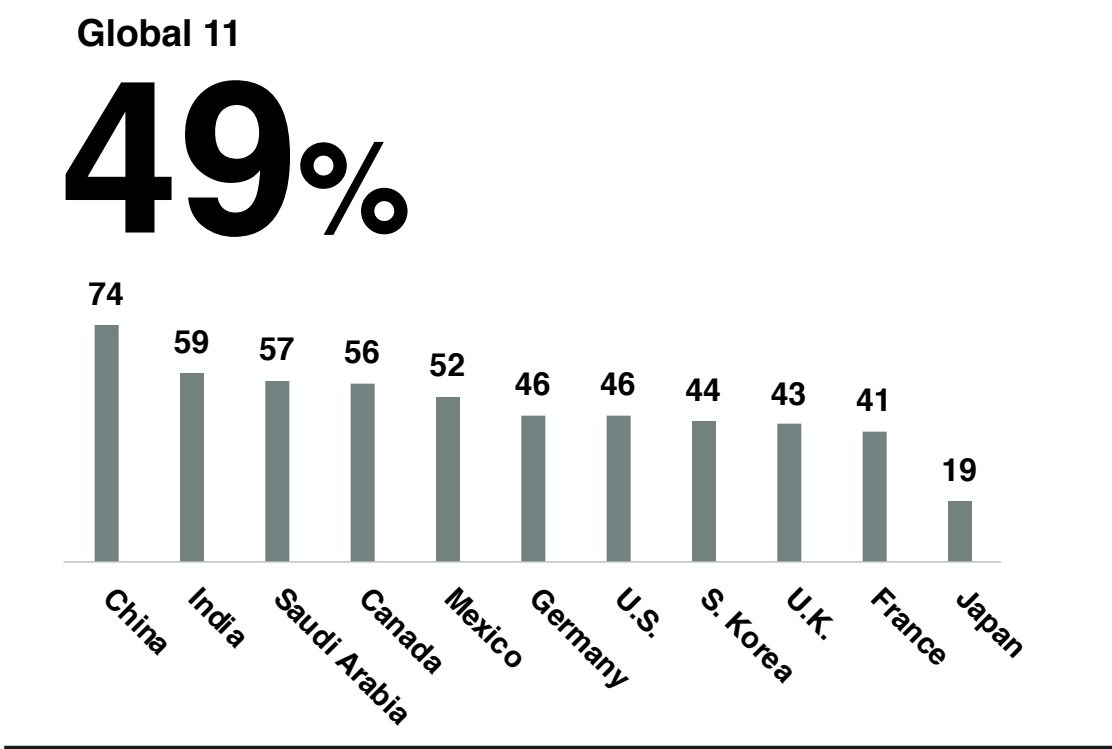
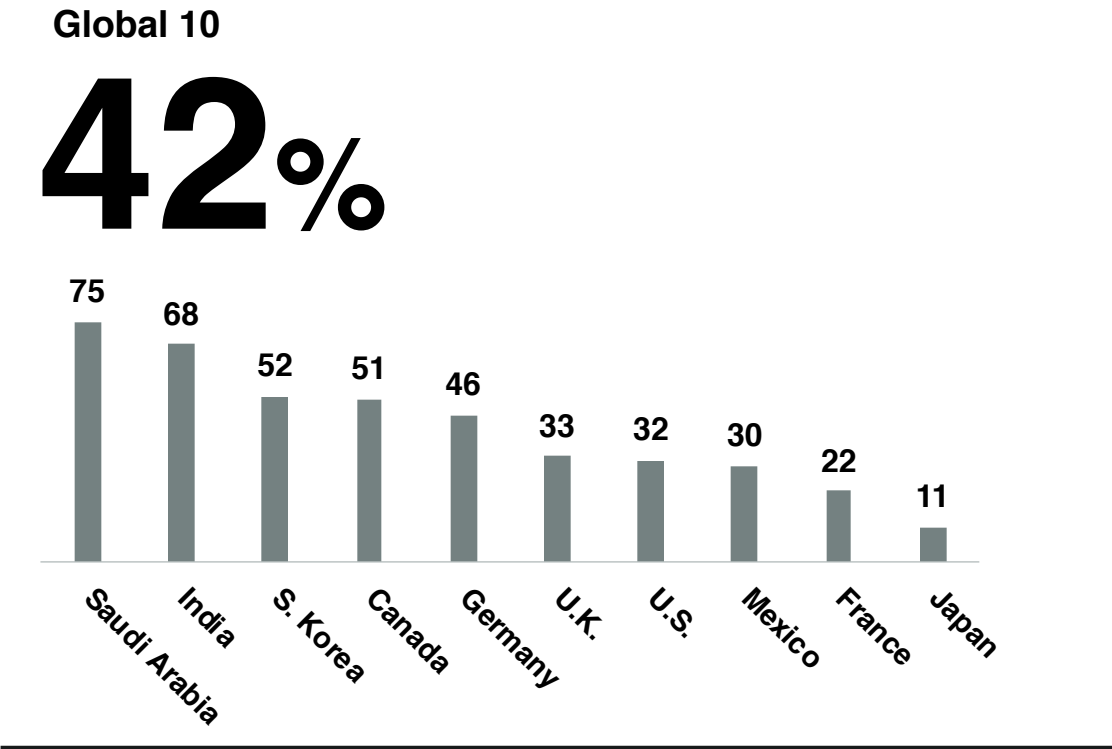
Percent who rate national government and business as doing well or very well

Government Performance


Ensuring **medical supplies and good treatment are available** even in the poorest areas

Business Performance

Implementing safety measures to **protect workers and customers**



2020 Edelman Trust Barometer Spring Update. NEW\_PER\_NATGOV. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe the national government of your country is currently doing each of the following? 5-point scale; top 2 box, doing well. General population, 10-mkt avg (excluding China). NEW\_PER\_BUS. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe business in general is currently doing each of the following? 5-point scale; top 2 box, doing well. General population, 11-mkt avg. \*Data on left excludes China from the results because we did not ask questions to respondents that were sensitive in nature.

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# FEAR OF JOB LOSS WORSENS

Percent of employees and job seekers who agree

January 2020 Edelman Trust Barometer

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

┃  
**80%**

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

┃  
**56%**

**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, 11-mkt avg, 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, 11-mkt avg, among those who are employed, furloughed/laid off due to the pandemic or unemployed for other reasons (Q206/1,2,8,9,10).

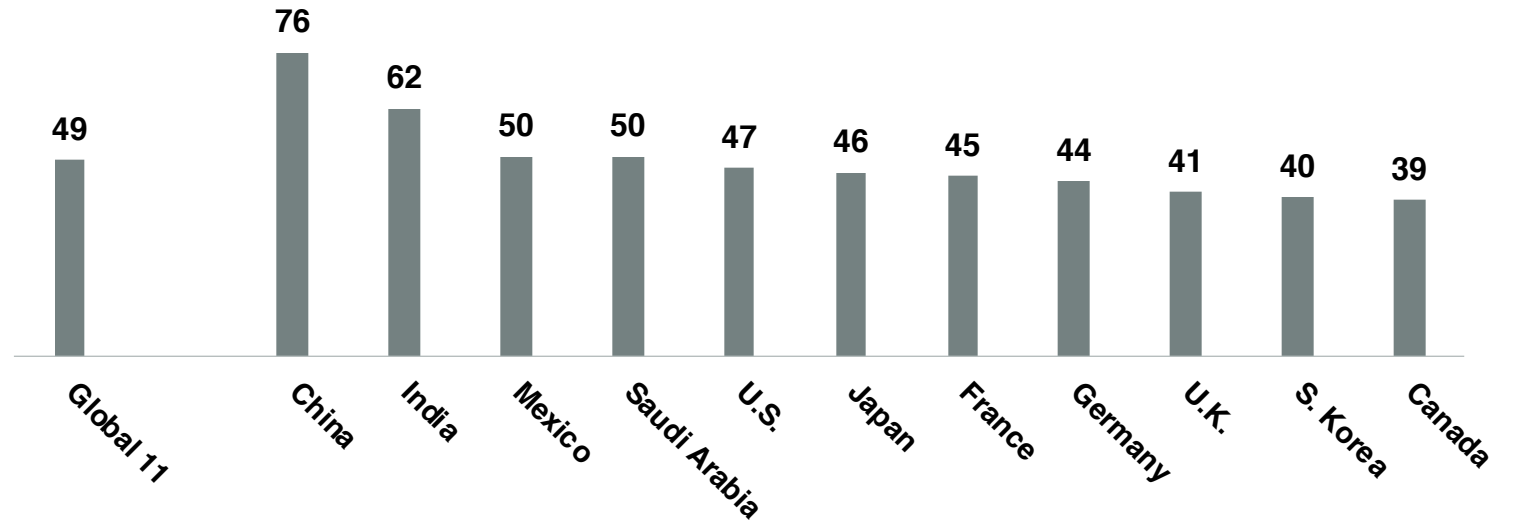
# FAKE NEWS CONCERNS ADD TO INSTABILITY

Percent who agree

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

⊥  
**67%**

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



# PANDEMIC SPOTLIGHTS SOCIETAL INEQUITIES

Percent 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**

⊥  
**64%**

**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

⊥  
**67%**

2020 Edelman Trust Barometer Spring Update. PER\_BLF. 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. 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, 11-mkt avg.

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# GOVERNMENT'S MOMENT

⌋



  
*Governor*  
*Andrew M. Cuomo*

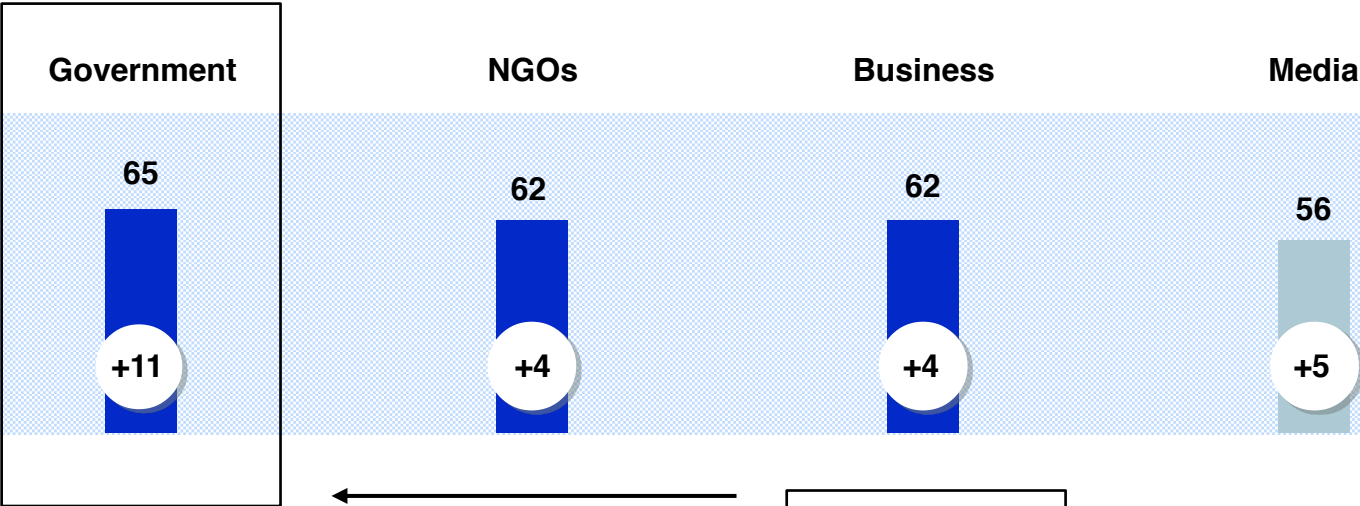


# A RE-ORDERING OF TRUST: GOVERNMENT NOW MOST TRUSTED

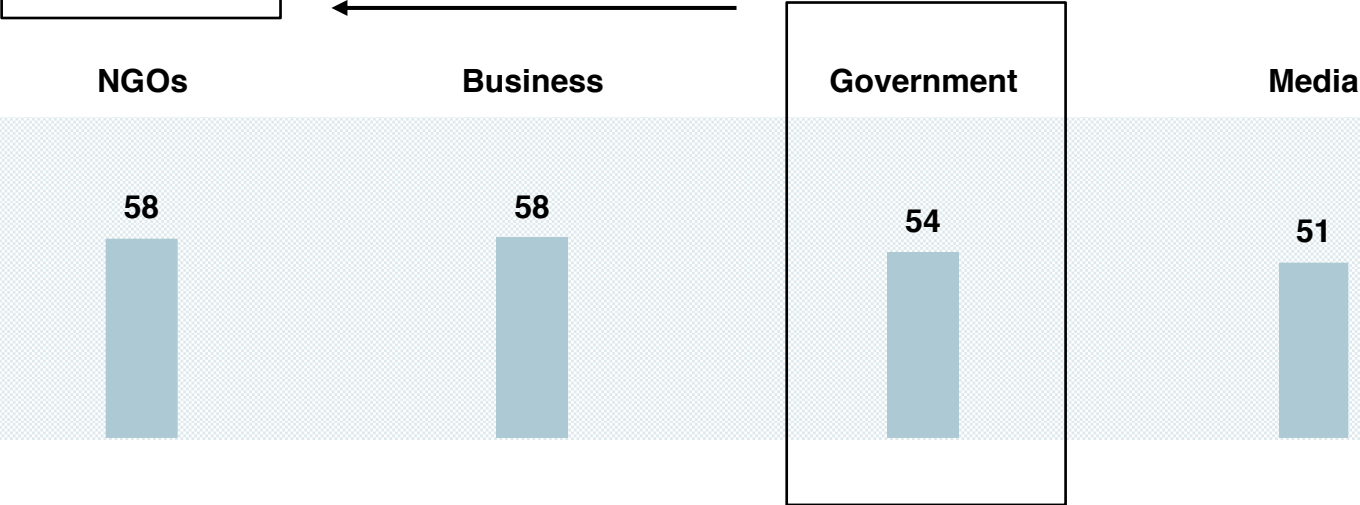
Percent trust



**May 2020  
Spring Update**  
Only media not trusted  
Government most trusted

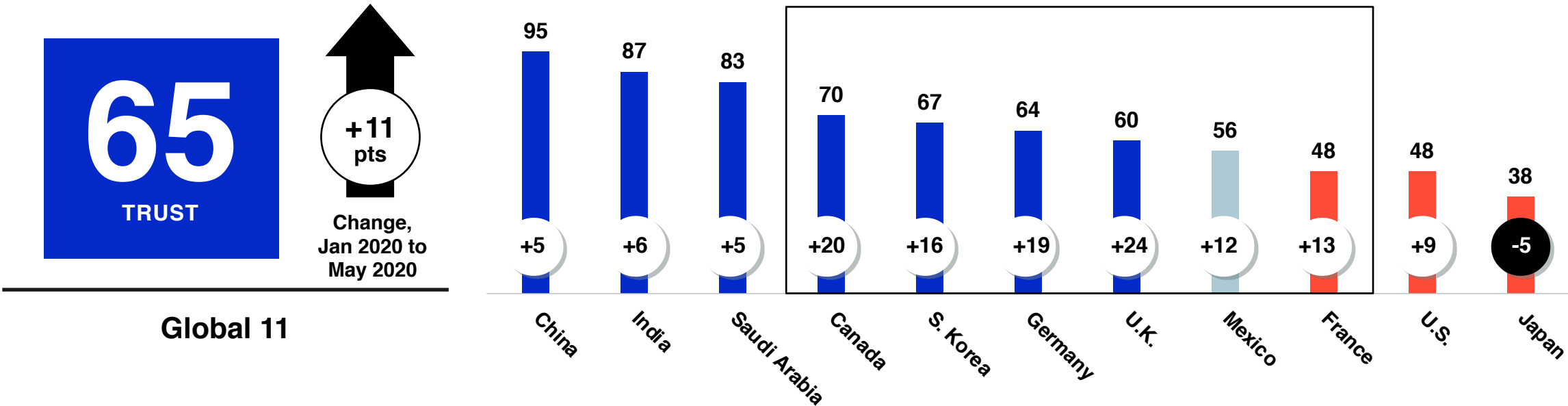


**January 2020  
Trust Barometer**  
No institutions trusted  
NGOs and business most trusted



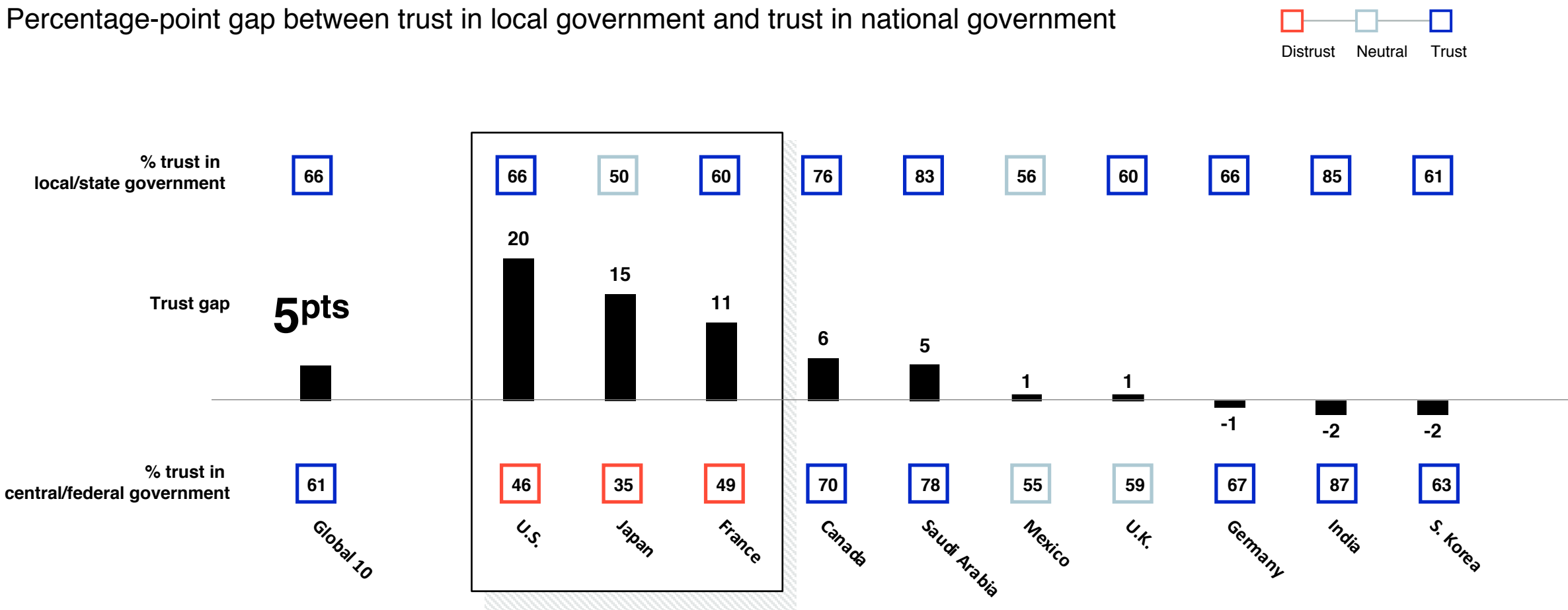
# DOUBLE-DIGIT RISE IN GOVERNMENT TRUST IN 6 OF 11 MARKETS MEASURED

Percent trust in government



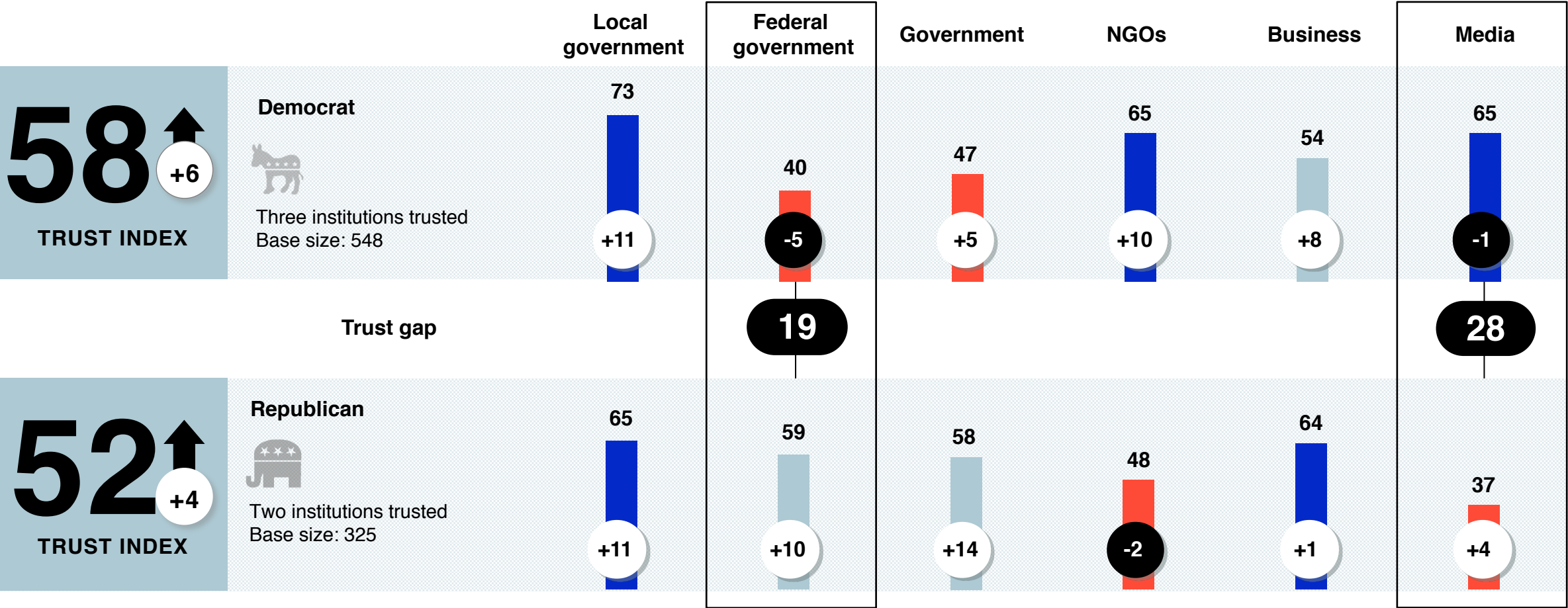
# WHERE NATIONAL GOVERNMENT LACKS TRUST, LOCAL GOVERNMENT FILLS THE VOID

Percentage-point gap between trust in local government and trust in national government



# U.S. POLITICAL DIVIDE

Percent trust, among those who intend to vote Republican or Democratic in Nov. 2020



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. Q44. Which political party do you intend to vote for in this year's Presidential election? General population, U.S. by the Republican or Democratic party the respondent intends to vote for in the 2020 U.S. Presidential Election (Q44/1-2).

# STRONGEST MANDATE FOR GOVERNMENT TO LEAD IN ALL AREAS OF PANDEMIC RESPONSE

Percent who expect each institution to take a leading role to address each challenge

## Highest expectation in all areas

Government	
Contain the pandemic	73
Inform the public	72
Provide economic relief and support	86
Help people cope	72
Get the country back to normal	79

## Other institutions expected to contribute in their areas of expertise

Media	
Contain the pandemic	21
Inform the public	58
Provide economic relief and support	23
Help people cope	30
Get the country back to normal	25

Business	
Contain the pandemic	39
Inform the public	25
Provide economic relief and support	56
Help people cope	50
Get the country back to normal	36

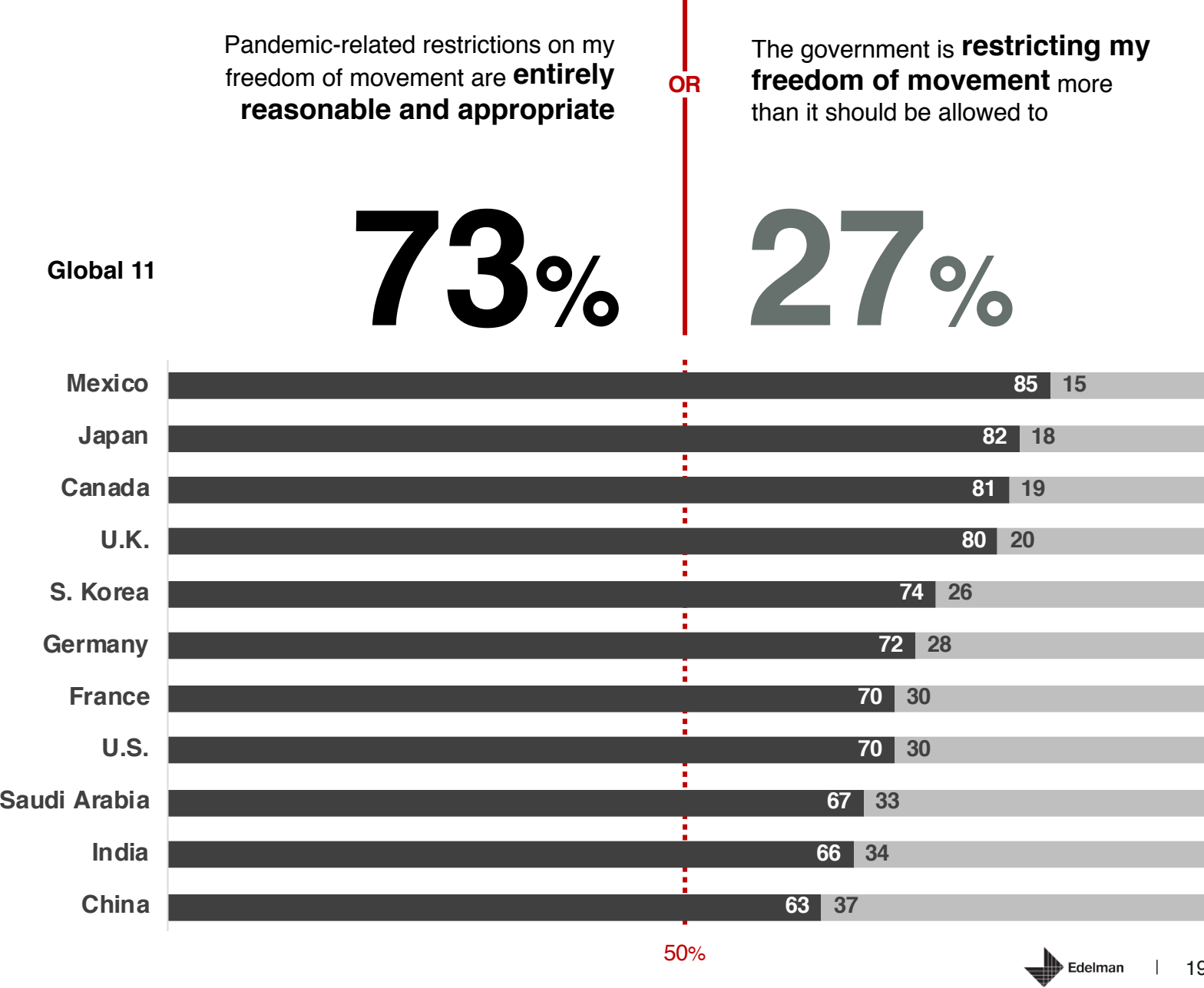
NGOs	
Contain the pandemic	30
Inform the public	30
Provide economic relief and support	33
Help people cope	47
Get the country back to normal	25

2020 Edelman Trust Barometer Spring Update. WHOSE\_JOB. For each of the pandemic-related challenges, please indicate which of these five institutions, if any, you expect to see taking a leading role in addressing it. Pick all that apply. General population, 11-mkt avg. "Contain the pandemic" is a net of r1 and r2, "Help people cope" is a net of r3 and r4, "Inform the public" is a net of r5 and r6, "Provide economic relief and support" is a net of r7-r9, "Get the country back to normal" is a net of r10 and r11.

# 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.



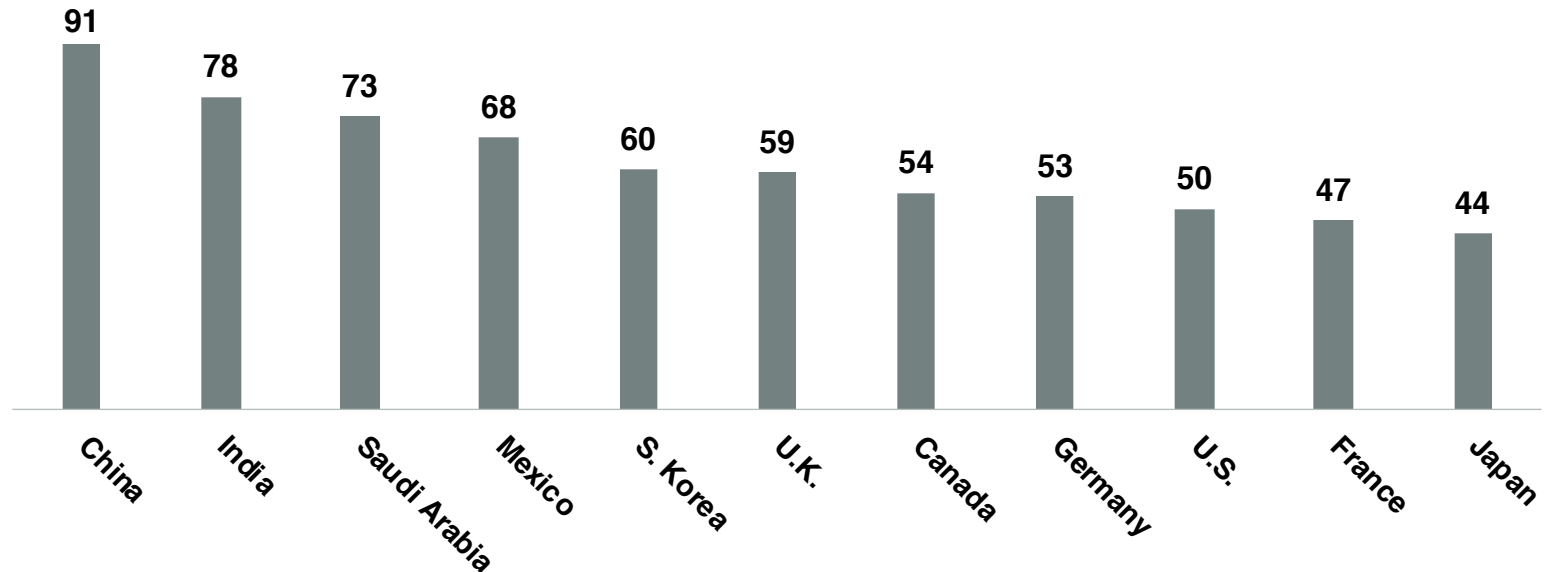
# PERMISSION TO TRACK PERSONAL DATA

Percent 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





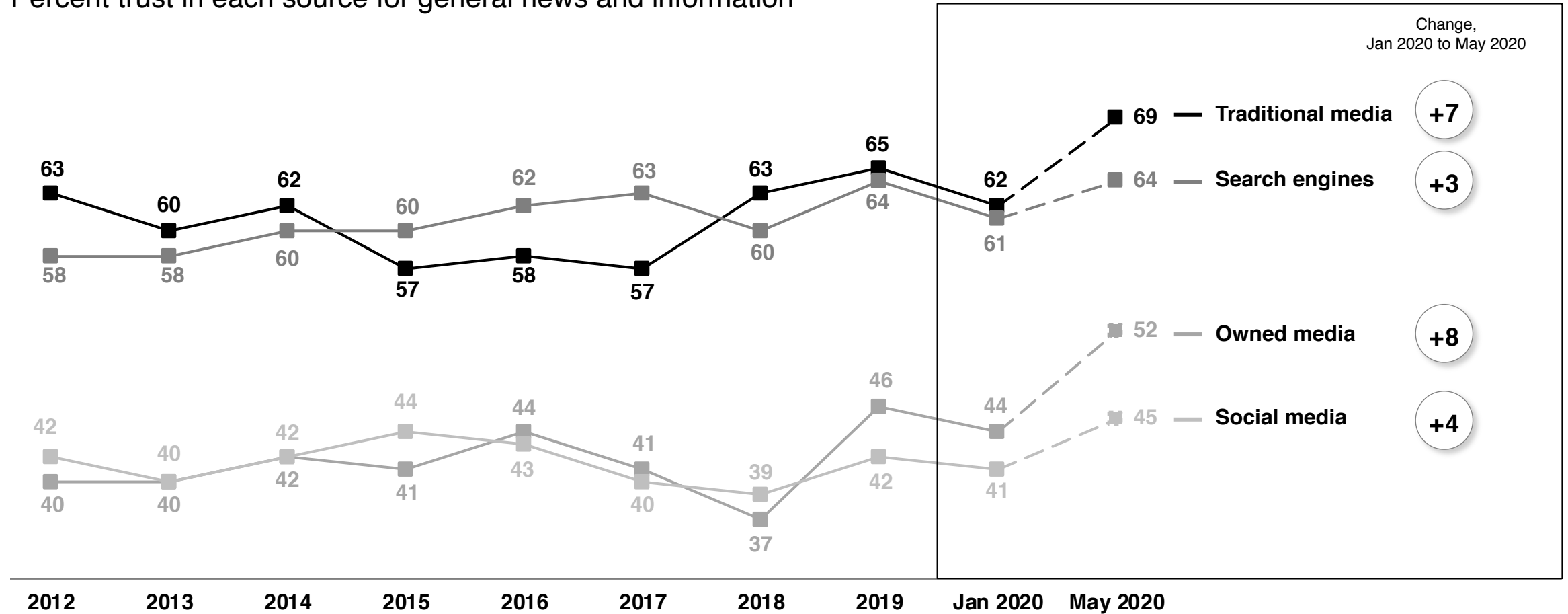
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# A VITAL ROLE FOR MEDIA AND NGOs

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# TRUST IN NEWS SOURCES AT ALL-TIME HIGH, GREATEST TRUST GAINS FOR TRADITIONAL AND OWNED

Percent trust in each source for general news and information

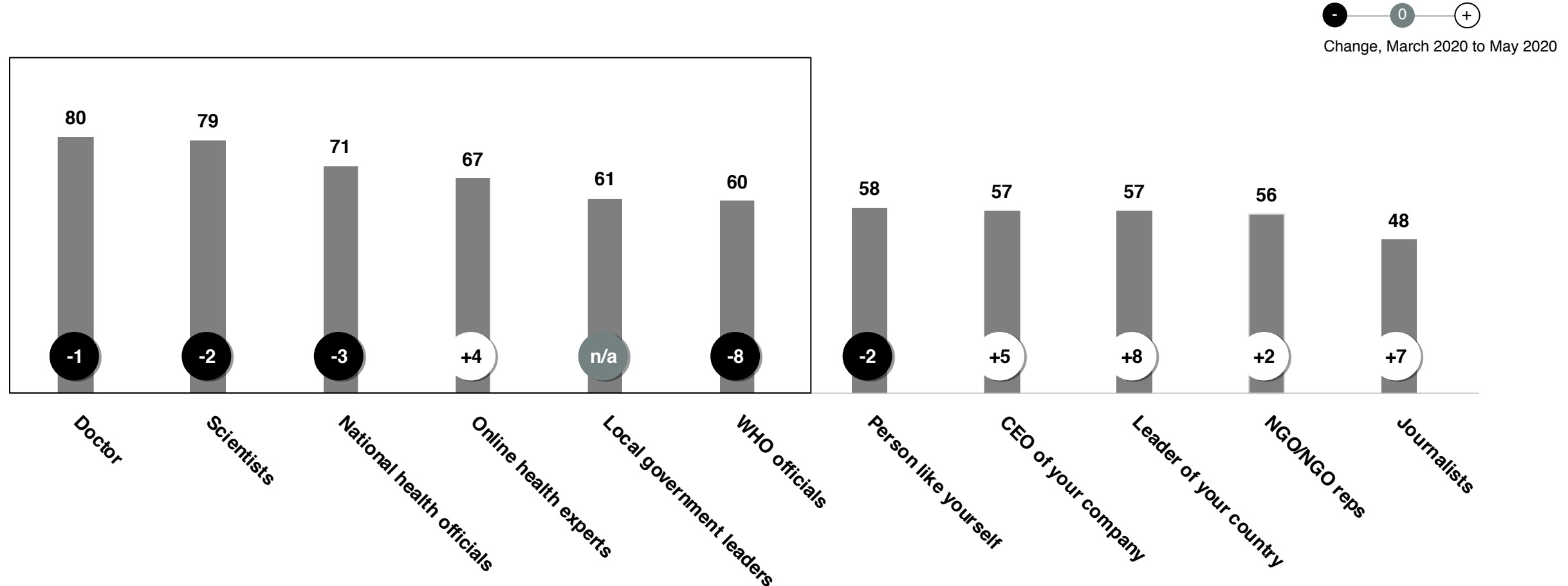


2020 Edelman Trust Barometer Spring Update. COM\_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? 9-point scale; top 4 box, trust. General population, 10-mkt avg.

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

# A CALL FOR EXPERT VOICES

Percent 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). 7-mkt avg. "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, 7-mkt avg.

# A CALL FOR MORE CREDIBLE AND UNBIASED JOURNALISM

Percent who say the media is performing well or very well on each

Doing original, investigative reporting to help you understand the **full story behind the pandemic and its potential lasting impact** on the economy and on peoples' lives

⊥  
**46%**

doing this well or very well

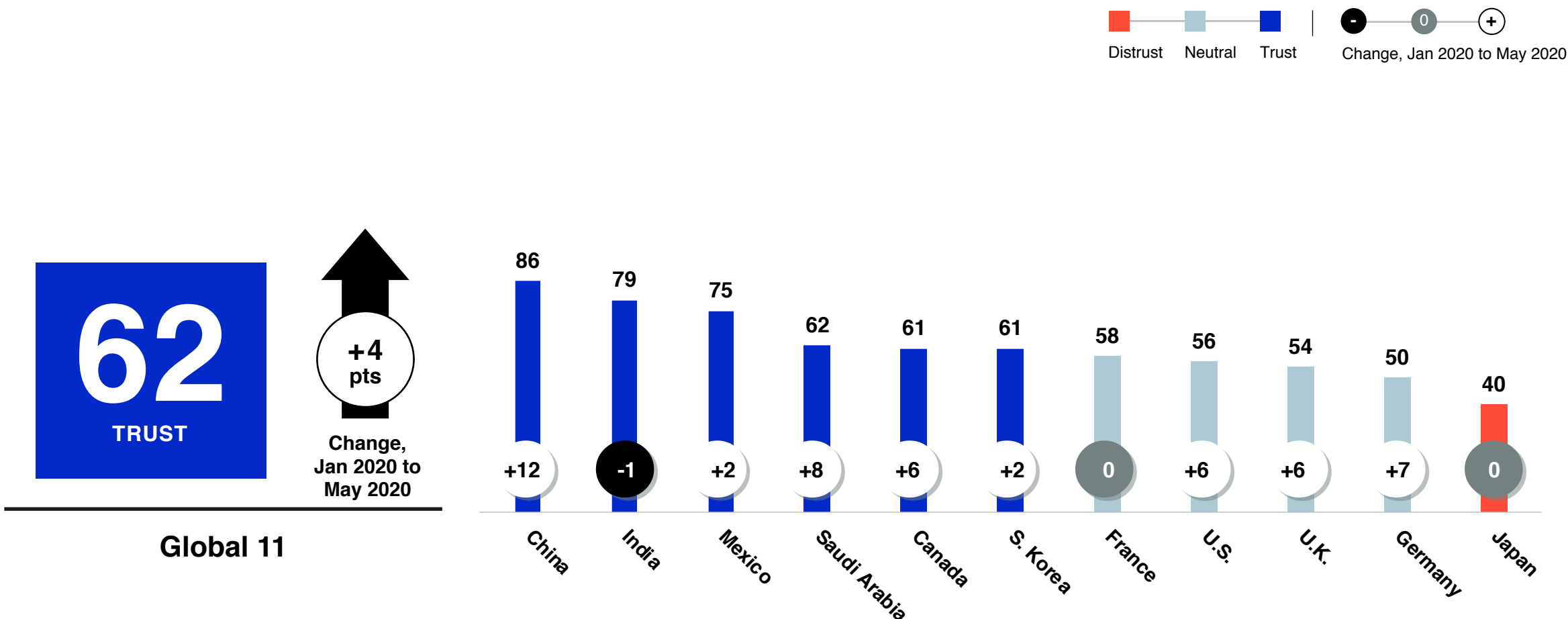
**Not allowing politics and ideological biases to affect** how they report pandemic news and information

⊥  
**40%**

doing this well or very well

# TRUST IN NGOs INCREASES IN 8 OF 11 MARKETS

Percent trust in NGOs



2020 Edelman Trust Barometer Spring Update. TRU\_INS. [NGOs 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.

# URGENT CALL FOR NGOS TO GET THINGS DONE

Percent who say NGOs are performing well or very well on each

**Taking care of people  
who are suffering** pandemic-  
related financial hardships

⊥

**38%**

doing this well or very well

**Raising money** for pandemic  
relief efforts

⊥

**41%**

doing this well or very well

**Coordinating local relief  
efforts** getting food, healthcare  
services and financial support to  
the most vulnerable members of  
our community

⊥

**43%**

doing this well or very well



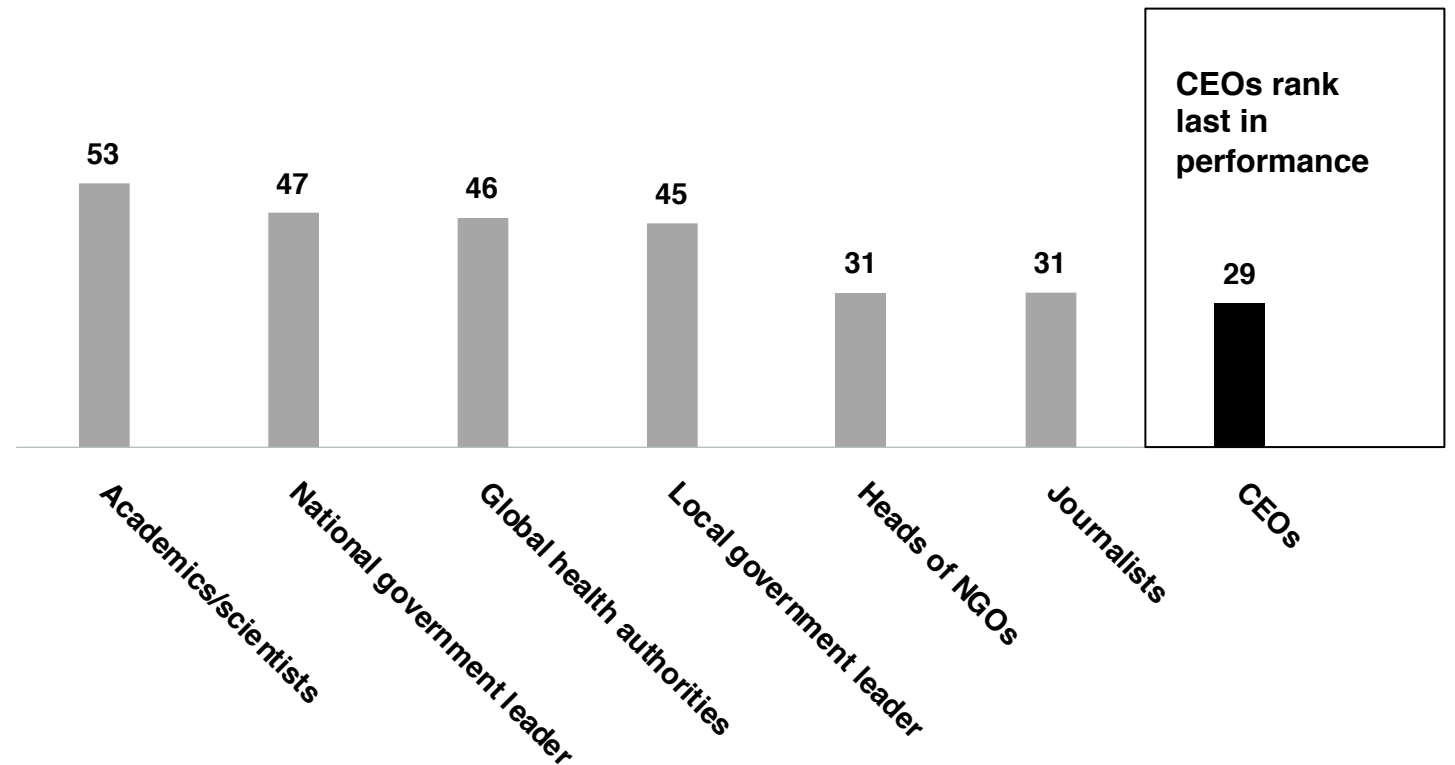
⊥  
**MOMENT OF RECKONING  
FOR BUSINESS**  
T

# CEOS FAILING TO DEMONSTRATE EXPECTED PUBLIC LEADERSHIP

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

└  
**65%**

Percent who say each are doing **an outstanding job** meeting the demands placed on them by the pandemic



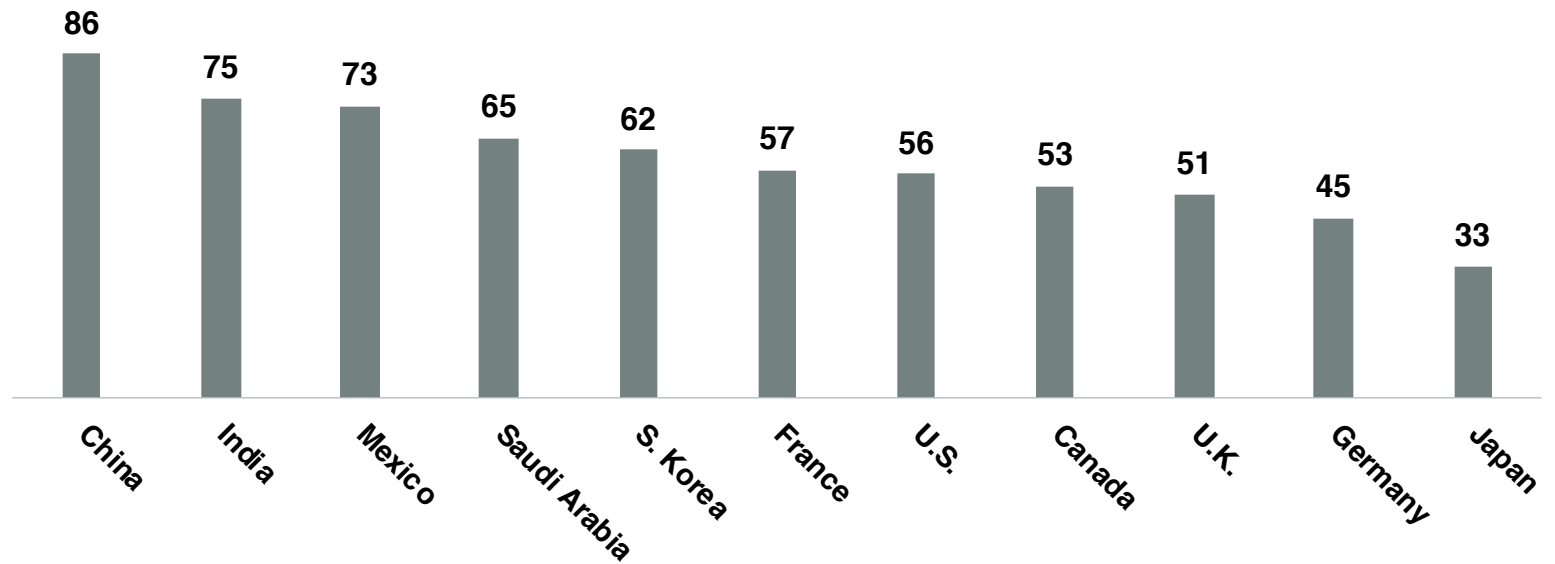
# ADDRESS NEEDS AT HOME FIRST

Percent who agree

A global CEO's first priority should be to **use the power and resources of their companies to help the people of the country where they are headquartered** before helping people in other countries where they do business

└  
**60%**

Global 11



# BUSINESS NOT SEEN AS MEETING THE CHALLENGE WITH EXPECTED LEVEL OF COMPETENCE

Percent 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

⊥  
**47%**

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

⊥  
**44%**

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

# BUSINESS NOT SEEN AS LOOKING OUT FOR EMPLOYEES OR BUSINESS PARTNERS

Percent who say business is performing well or very well on each

**Putting people  
before profits**

⊥

**38%**

doing this well or very well

**Protecting their employee's  
financial wellbeing and  
safeguarding their jobs**

⊥

**39%**

doing this well or very well

**Helping their smaller  
suppliers and business  
customers stay in business by  
extending them credit or giving  
them more time to pay**

⊥

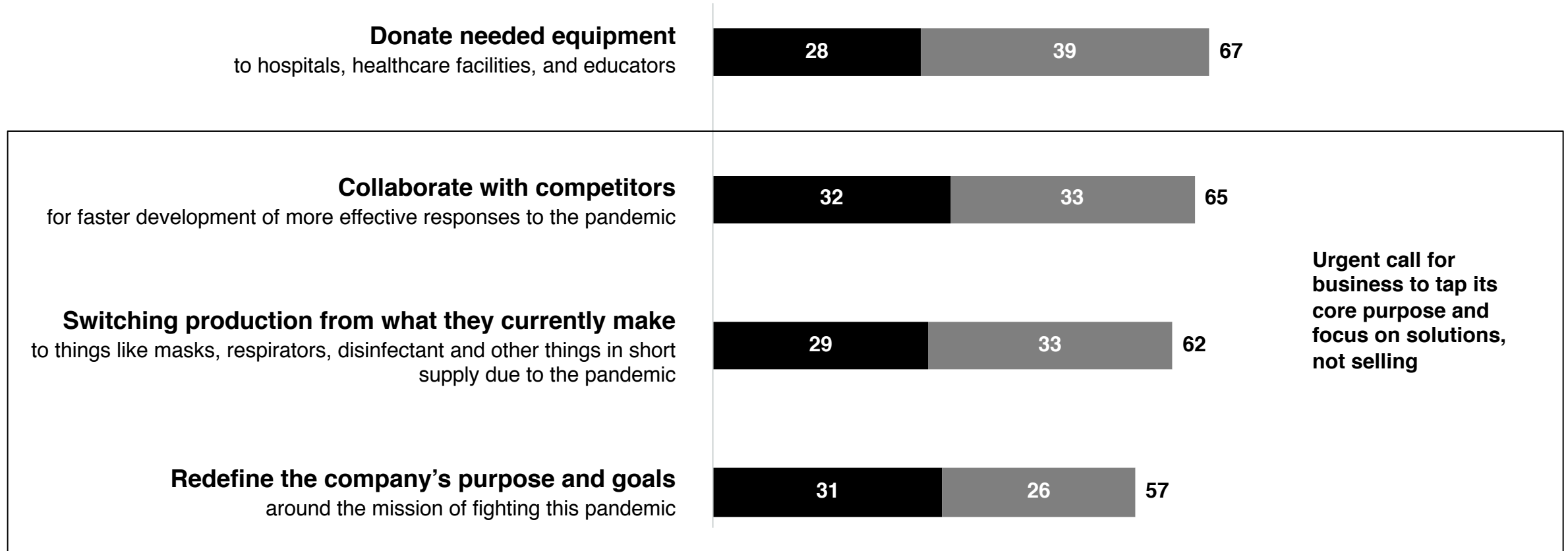
**38%**

doing this well or very well

# TO INCREASE TRUST, BUSINESS MUST JOIN THE FIGHT AGAINST THE PANDEMIC

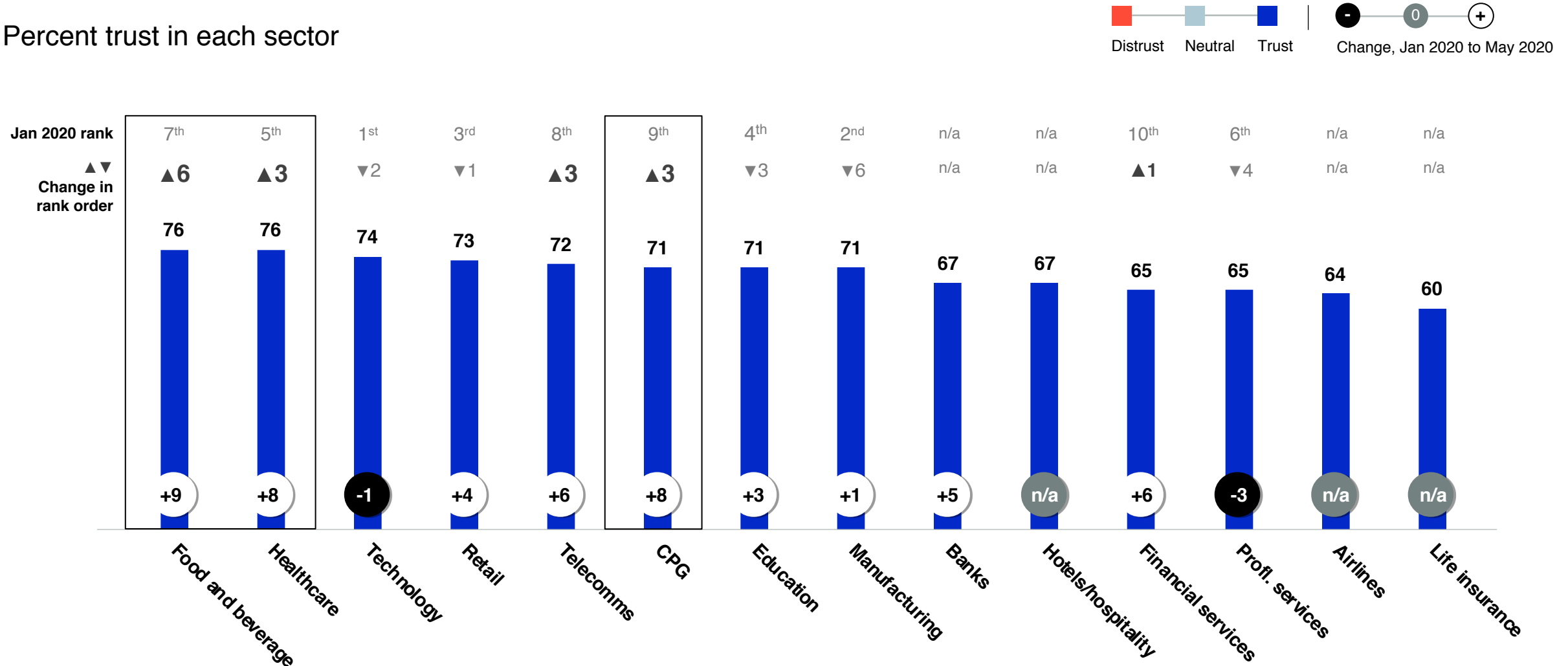
Percent who indicate that the below actions will maintain or increase their trust in business

■ Maintain ■ Increase



# GREATEST TRUST GAINS TO DATE FOR SECTORS ON THE FRONT LINE

Percent trust in each sector



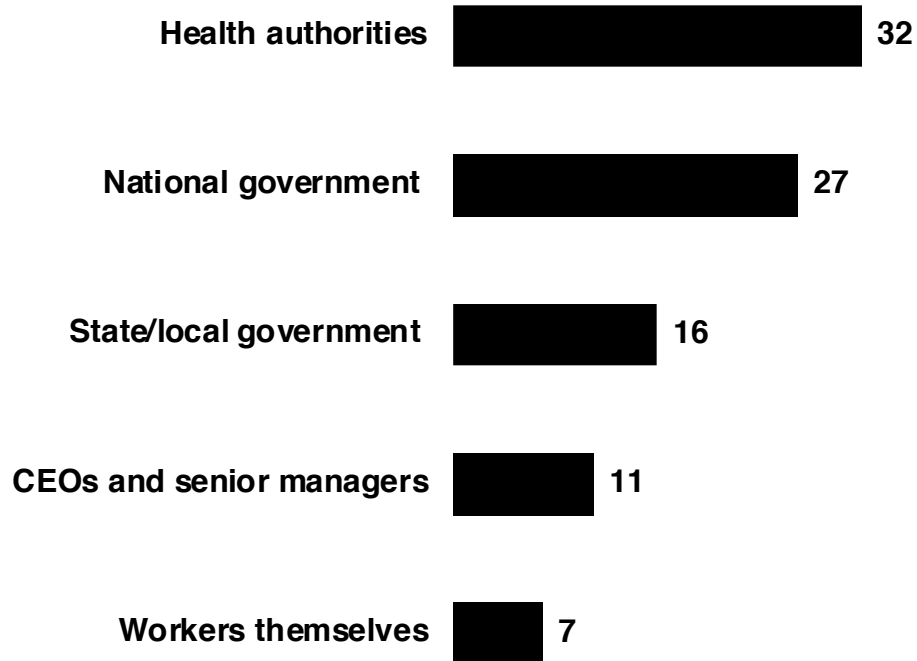
2020 Edelman Trust Barometer Spring Update. TRU\_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg. Some 2019 data was only asked of one-fifth of the sample.



# TOWARDS A NEW NORMAL

# BUSINESS MUST PARTNER WITH GOVERNMENT FOR RESPONSIBLE RETURN TO WORK

Percent who say each should lead in making remaking turn 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

75%

25%

# 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

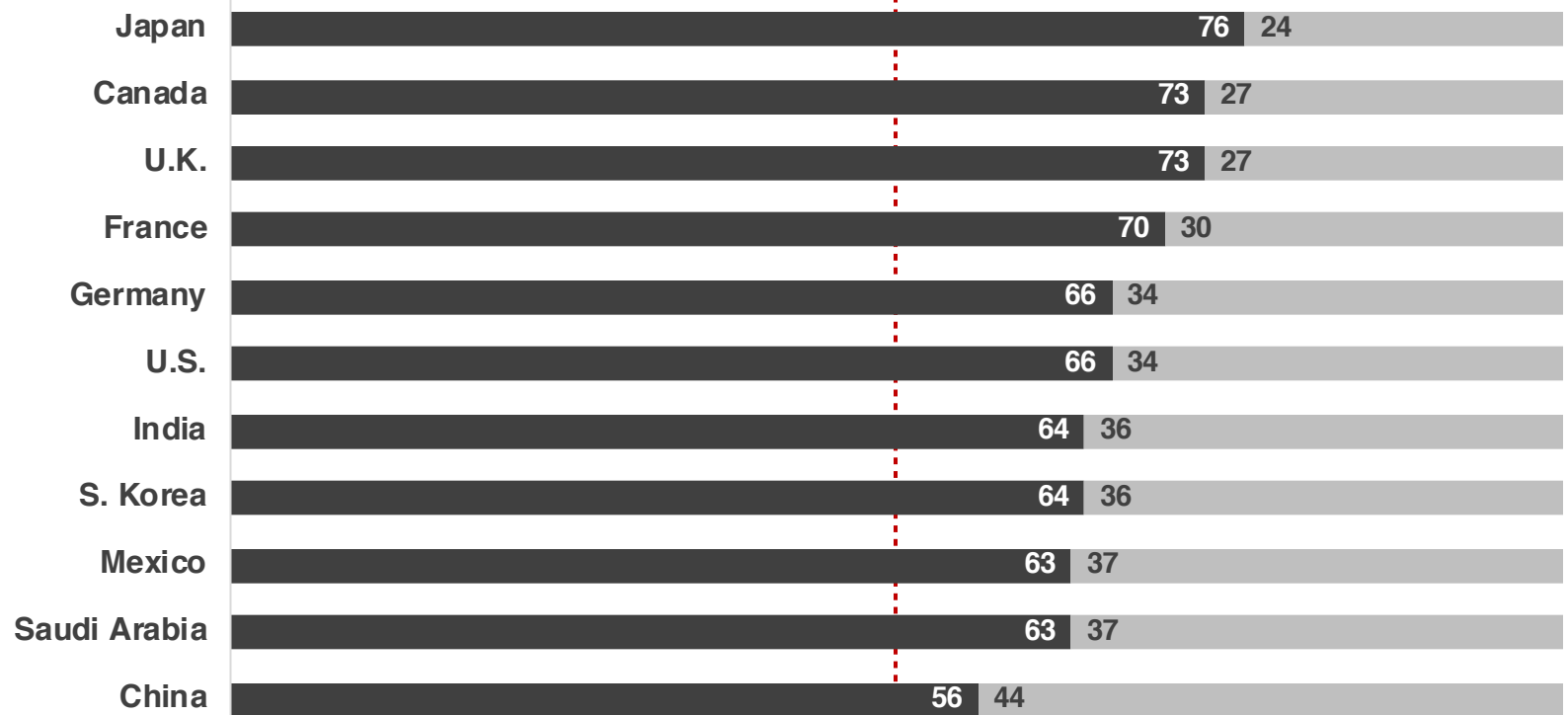
OR

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%

Global 11

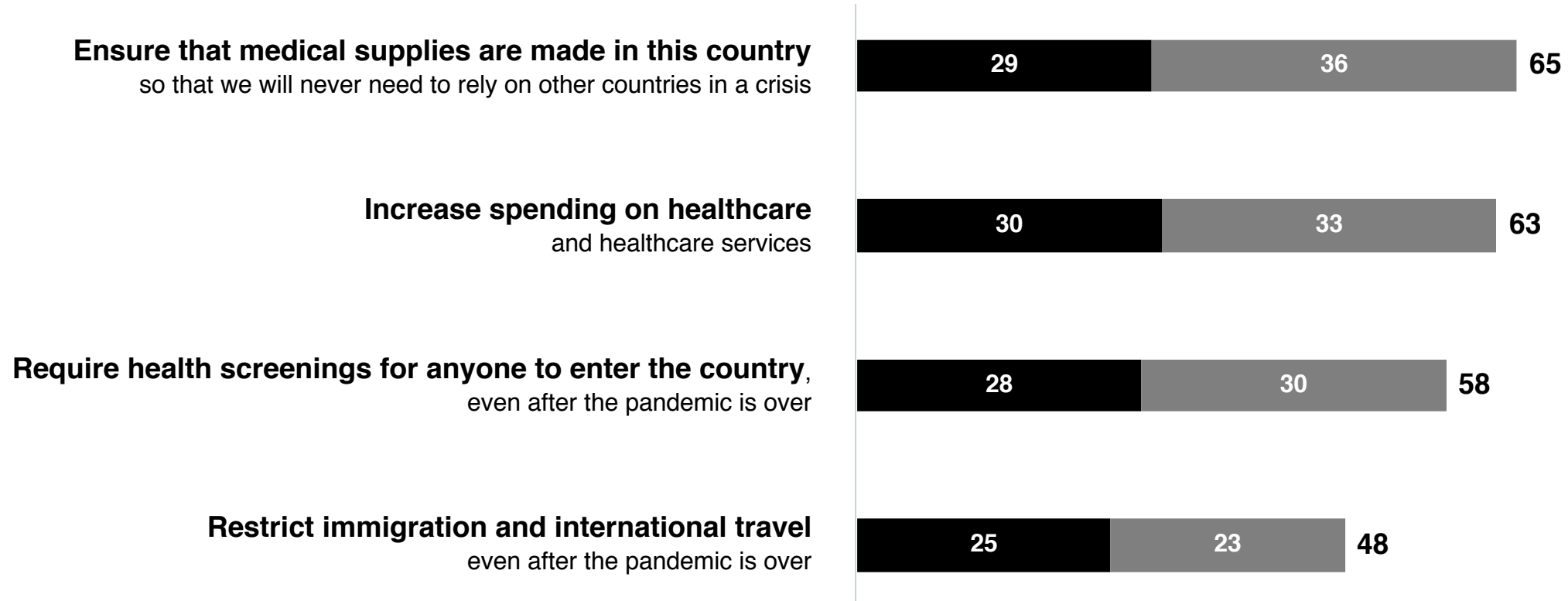


50%

# GOVERNMENT MUST BUILD A MORE RESILIENT SYSTEM FOR THE FUTURE

Percent 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

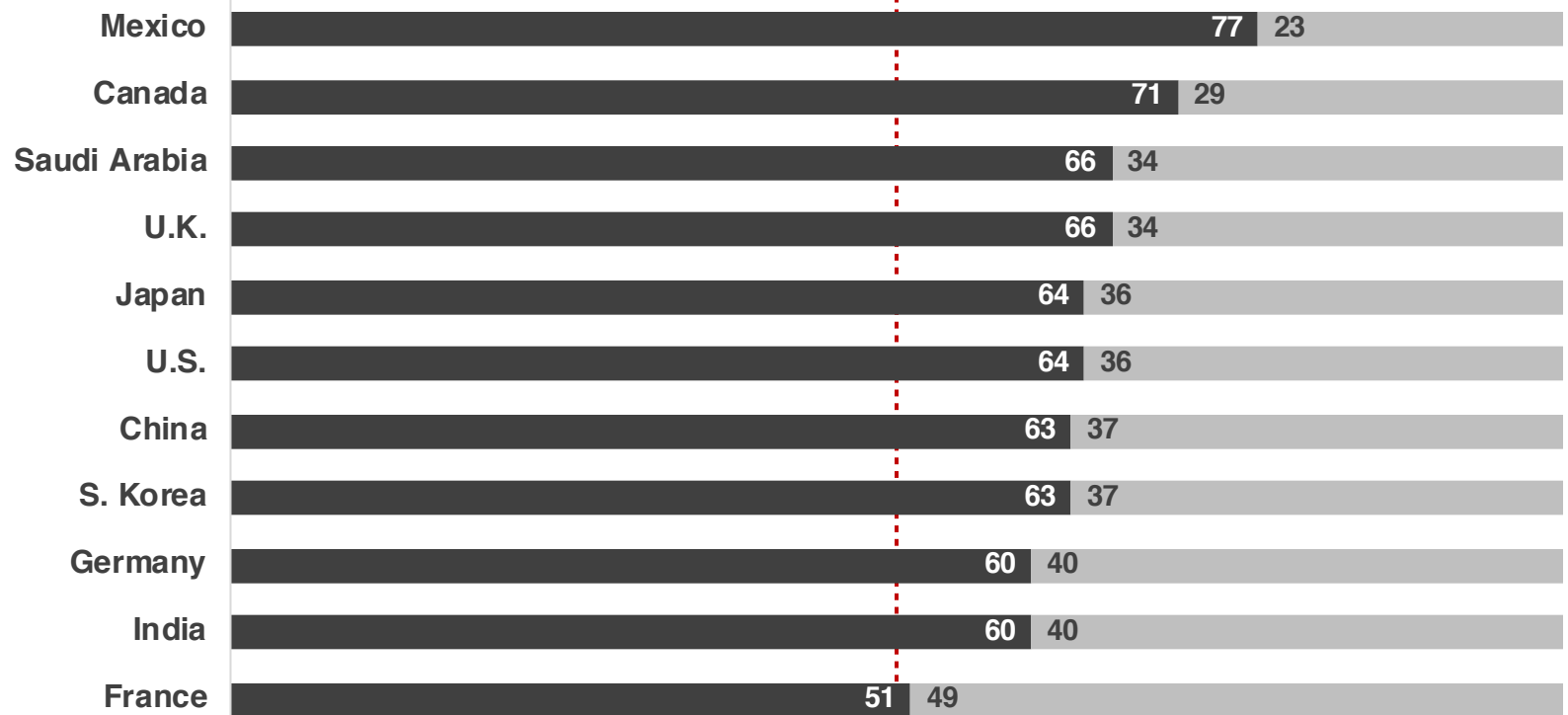
OR

**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%

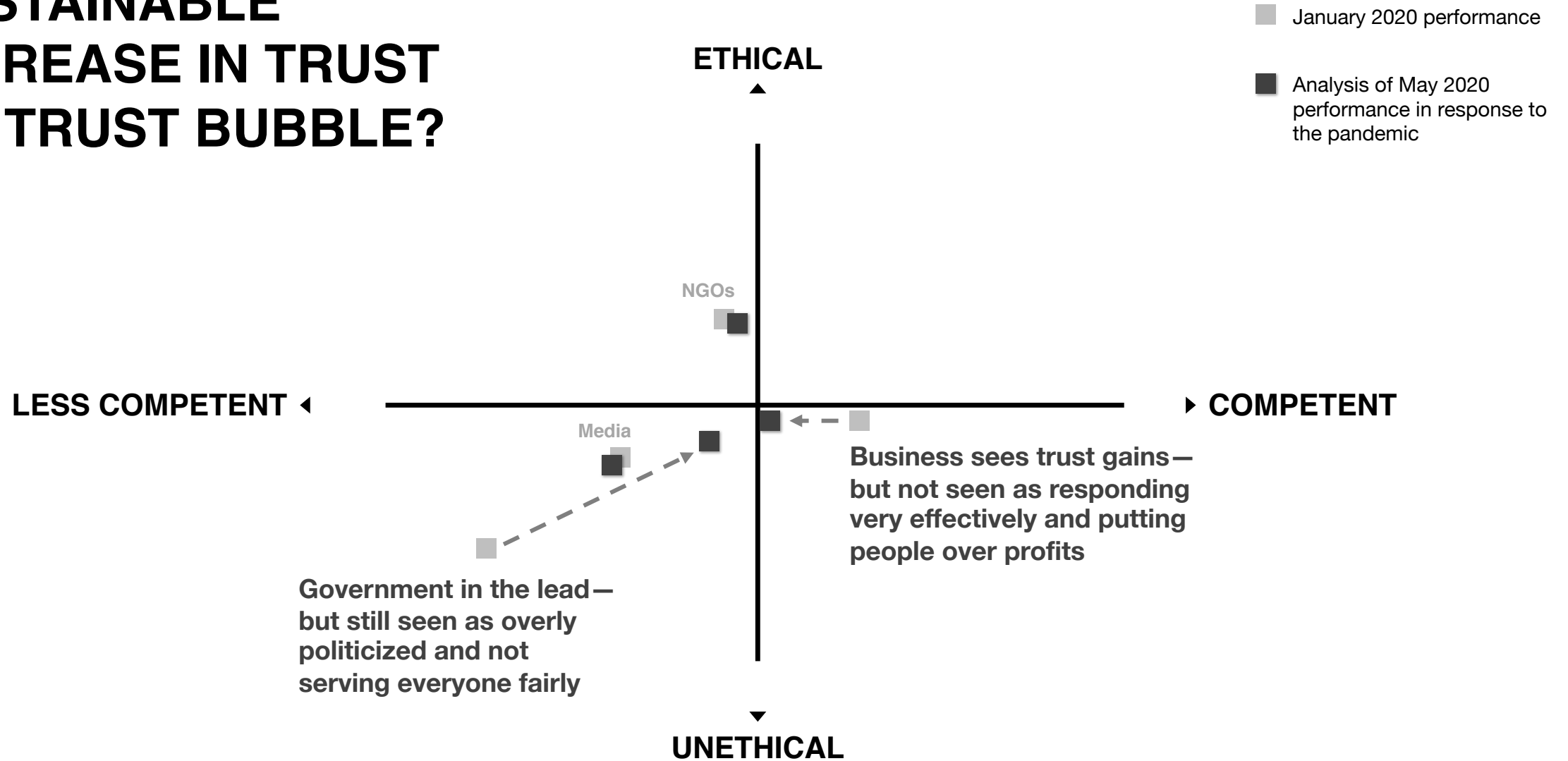
36%

Global 11



50%

# SUSTAINABLE INCREASE IN TRUST OR TRUST BUBBLE?



January 2020 placement of institutions based on the 2020 Edelman Trust Barometer analysis of net ethical and competence scores for each dimension. For full details regarding how these scores were calculated and plotted, please see the Technical Appendix of the January 2020 Edelman Trust Barometer report. May 2020 performance based on analysis of the average net scores for NEW\_PER\_[INSTITUTION] in the 2020 Edelman Trust Barometer Spring Update. NEW\_PER\_[INSTITUTION]. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe [insert institution] is currently doing each of the following? General population, 11-mkt avg. \*May 2020 data for “government” is based on a 10-mkt avg that excludes China. For a full explanation of the analysis done, please refer to the Technical Appendix.

# A MOMENT OF RECKONING

**1.**

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

**2.**

**Business and  
government  
must collaborate  
on solutions**

**3.**

**Business must  
live up to its  
multi-  
stakeholder  
promise**

**4.**

**CEOs must  
demonstrate  
public  
leadership**

**5.**

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

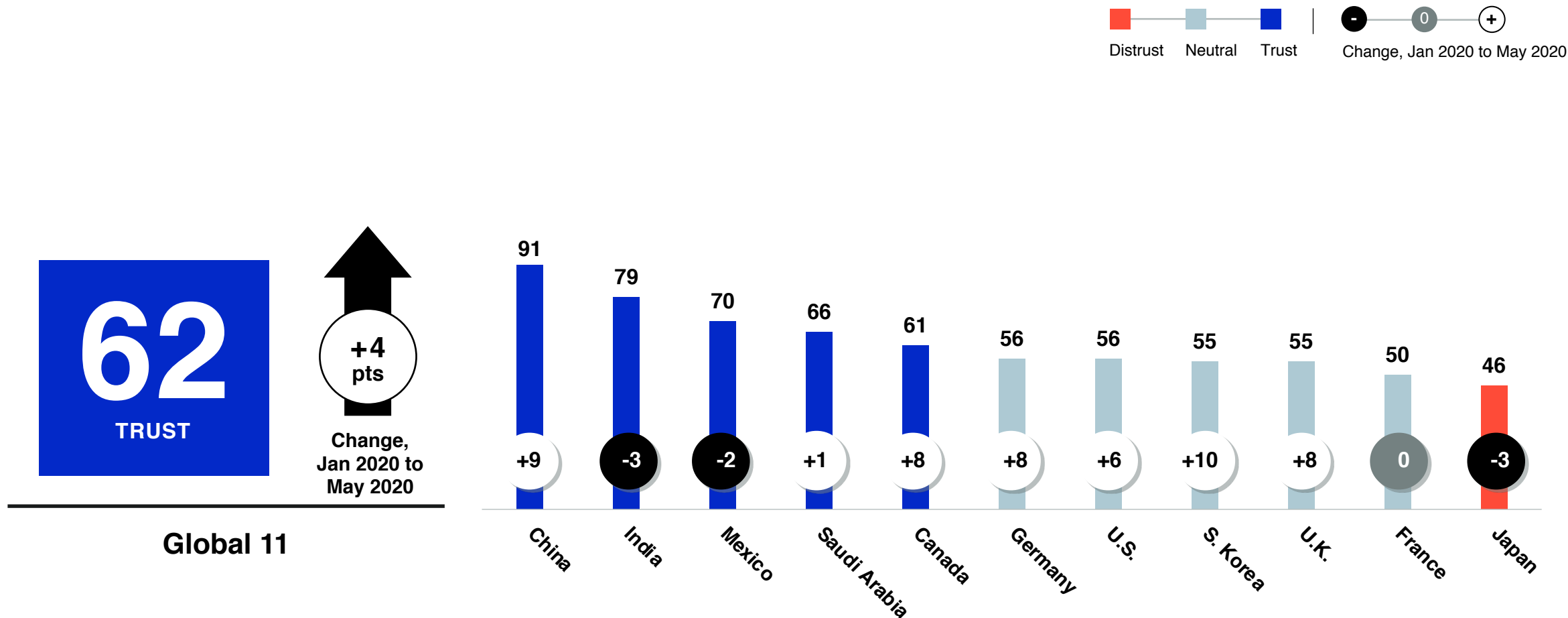
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# **SUPPLEMENTAL DATA AND TECHNICAL APPENDIX**

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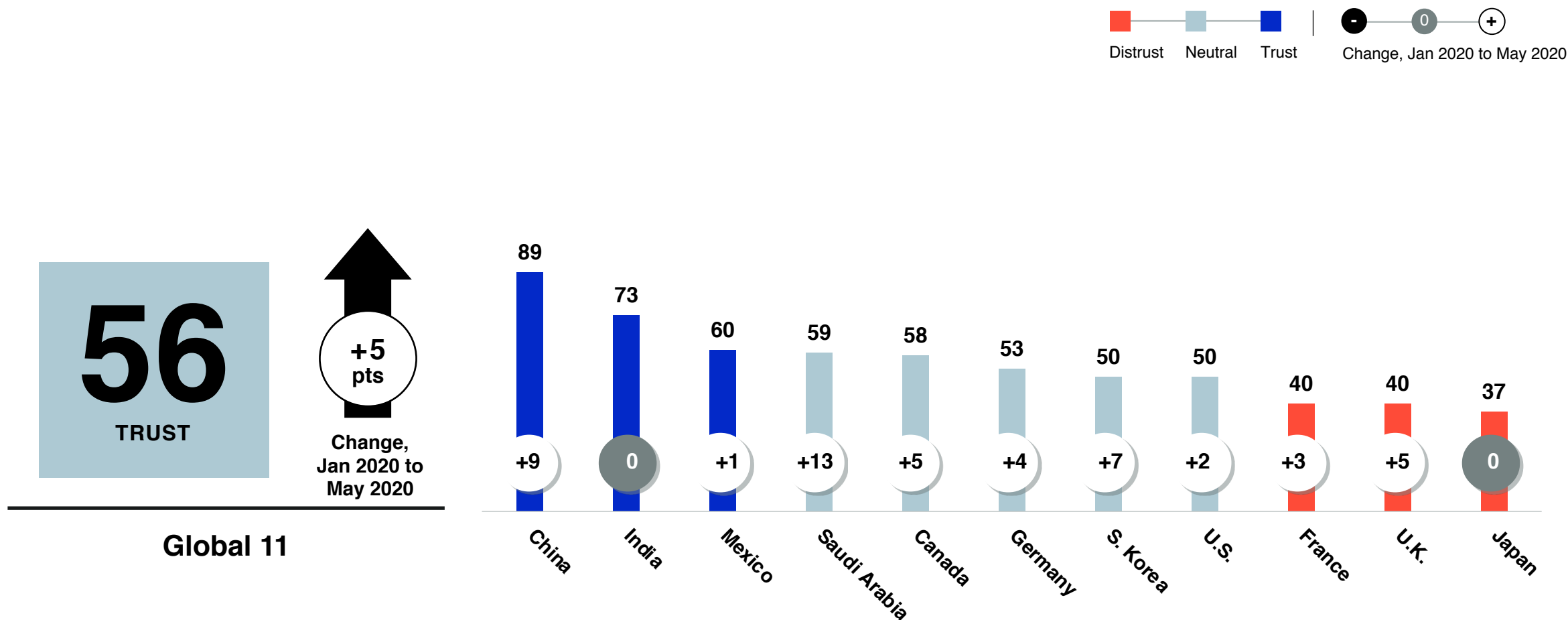
# TRUST IN BUSINESS INCREASES IN 7 OF 11 MARKETS

Percent trust in business



# TRUST IN MEDIA INCREASES IN 9 OF 11 MARKETS

Percent trust in media



## DATA IN DETAIL

# EXPECTATION FOR INSTITUTIONS TO LEAD IN FIGHTING THE COVID PANDEMIC

Percent who expect the institution to take a leading role to address each challenge

	Government	NGOs	Business	Media
<b>CONTAIN THE PANDEMIC</b>	<b>73</b>	<b>30</b>	<b>39</b>	<b>21</b>
Develop treatments and a vaccine for COVID-19	40	20	28	9
Develop and put in place the necessary policies and procedures to slow and control the spread of the virus	66	17	17	15
<b>HELP PEOPLE COPE</b>	<b>72</b>	<b>47</b>	<b>50</b>	<b>30</b>
Feed the poor, the newly unemployed, and others who cannot easily get access to or afford food	63	38	25	12
Create services that make it easier for people to stay productive and emotionally connected while in lockdown	47	24	38	23
<b>INFORM THE PUBLIC</b>	<b>72</b>	<b>30</b>	<b>25</b>	<b>58</b>
Keep people well-informed about the virus, the availability of tests, and progress in finding a cure	57	19	15	45
Keep people well-informed about where to get help and how to access government assistance	62	21	16	45
<b>PROVIDE ECONOMIC RELIEF AND SUPPORT</b>	<b>86</b>	<b>33</b>	<b>56</b>	<b>23</b>
Giving financial relief and support to people who have lost their jobs or livelihood	71	20	26	10
Keeping the country's economy running as well as possible	69	14	38	12
Helping small businesses survive until they can reopen	70	16	24	11
<b>GET THE COUNTRY BACK TO NORMAL</b>	<b>79</b>	<b>25</b>	<b>36</b>	<b>25</b>
Develop guidelines for when it is okay to relax social distancing requirements	67	15	17	16
Plan and prepare for how the country will get back to normal after the worst of the pandemic is over	70	17	26	16

2020 Edelman Trust Barometer Spring Update. WHOSE\_JOB. For each of the pandemic-related challenges, please indicate which of these five institutions, if any, you expect to see taking a leading role in addressing it. Pick all that apply. General population, 11-mkt avg. "Contain the pandemic" is a net of r1 and r2, "Help people cope" is a net of r3 and r4, "Inform the public" is a net of r5 and r6, "Provide economic relief and support" is a net of r7-r9, "Get the country back to normal" is a net of r10 and r11.

## DATA IN DETAIL

# GOVERNMENT PERFORMANCE IN RESPONSE TO THE PANDEMIC

Percent who say national government is doing well or very well on each

	Global 10	Canada	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Korea	U.K.	U.S.
Being a reliable source of useful and accurate information	50	63	32	54	72	16	43	74	56	51	34
Partnering and collaborating with other organizations and institutions to mount the strongest and most effective response to the pandemic possible	47	57	33	49	71	11	37	72	57	44	35
Coordinating efforts across companies, institutions and regional governments to ensure that we are mounting the strongest and most effective response to the pandemic possible	47	58	32	47	71	11	37	74	58	42	35
Taking the necessary actions to keep the economy from collapsing	47	57	34	49	69	14	34	73	49	52	36
Meeting your overall expectations for how they should be responding in this crisis	46	60	27	50	69	11	35	75	55	42	33
Taking care of people who are suffering pandemic-related financial hardships	45	63	32	44	68	10	30	71	50	46	34
Developing solutions to our pandemic-related medical problems and challenges	45	55	28	47	71	12	35	74	54	39	34
Getting money and financial relief to those who need it most	45	64	37	44	67	13	31	71	48	42	36
Working in effective partnership with other countries to address the pandemic	45	55	33	43	73	13	39	71	57	36	32
Preparing for the eventual recovery and figuring how to return things to normal as quickly as possible	44	52	31	46	69	11	36	73	53	37	34
Putting aside political partisanship and working across ideological divides to get things done	44	57	31	48	68	10	34	71	48	47	29
Creating a distribution system that ensures that medical and other necessary supplies are getting to where they are needed most	43	54	24	41	69	12	32	73	55	32	34
Ensuring that medical supplies and good quality medical treatment are available even in the poorest areas	42	51	22	46	68	11	30	75	52	33	32
Distributing virus tests and determining who gets tested	39	43	17	34	66	8	28	74	63	24	30

2020 Edelman Trust Barometer Spring Update. NEW\_PER\_NATGOV. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe the national government of your country is currently doing each of the following? 5-point scale; top 2 box, doing well. General population, 10-mkt avg (excluding China). Data excludes China from the results because we did not ask questions to respondents that were sensitive in nature.

## DATA IN DETAIL

# NGO PERFORMANCE IN RESPONSE TO THE PANDEMIC

Percent who say NGOs are doing well or very well on each

	Global 11	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Korea	U.K.	U.S.
Coordinating local relief efforts getting food, healthcare services and financial support to the most vulnerable members of our community	43	42	67	38	36	67	12	44	57	29	37	43
Being a reliable source of useful and accurate information	41	37	67	34	33	59	10	55	55	29	33	39
Partnering and collaborating with other organizations and institutions to mount the strongest and most effective response to the pandemic possible	41	40	69	34	34	61	9	48	56	27	33	42
Raising money for pandemic relief efforts	41	38	68	37	34	65	11	41	54	29	36	42
Meeting your overall expectations for how they should be responding in this crisis	40	39	68	30	32	60	9	47	55	26	32	40
Coordinating global efforts to combat and control the spread of the virus	39	34	67	29	32	59	8	50	56	28	28	38
Taking care of people who are suffering pandemic-related financial hardships	38	34	65	29	30	62	11	35	53	28	32	38
Developing solutions to our pandemic-related medical problems and challenges	38	35	64	30	32	55	8	44	55	26	30	37
Preparing for the eventual recovery and figuring how to return things to normal as quickly as possible	36	30	66	27	28	57	9	44	54	25	25	36

## DATA IN DETAIL

# BUSINESS PERFORMANCE IN RESPONSE TO THE PANDEMIC

Percent who say business is doing well or very well on each

	Global 11	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Korea	U.K.	U.S.
Implementing safety measures to protect both workers and customers	49	56	74	41	46	59	19	52	57	44	43	46
Ensuring that the products and services that people need most are readily available and easily accessible	47	53	71	43	43	59	17	52	58	40	44	41
Protecting essential employees whose jobs require them to work outside of their home thereby increasing their risk of exposure to the virus	44	48	71	36	42	58	16	43	54	42	35	42
Preparing for the eventual recovery and figuring how to return things to normal as quickly as possible	42	42	71	38	39	54	13	44	52	37	28	39
Meeting your overall expectations for how they should be responding in this crisis	42	48	67	32	37	54	14	42	53	38	37	42
Partnering and collaborating with other organizations and institutions to mount the strongest and most effective response to the pandemic possible	41	42	69	32	34	54	14	40	54	39	34	40
Developing solutions to our pandemic-related medical problems and challenges	40	43	66	29	39	53	16	37	51	37	34	38
Being a reliable source of useful and accurate information	39	39	68	26	31	55	14	43	52	35	31	37
Protecting their employee's financial wellbeing and safeguarding their jobs	39	42	71	35	33	51	14	38	49	29	35	37
Helping their smaller suppliers and business customers stay in business by extending them credit or giving them more time to pay	38	37	68	27	31	53	12	36	51	33	29	38
Putting people before profits	38	41	68	27	30	52	15	34	50	31	32	38
Taking care of people who are suffering pandemic-related financial hardships	34	33	66	22	28	52	9	30	47	29	27	36

## DATA IN DETAIL

# MEDIA PERFORMANCE IN RESPONSE TO THE PANDEMIC

Percent who say media is doing well  
or very well on each

	Global 11	Canada	China	France	Germany	India	Japan	Mexico	Saudi Arabia	S. Korea	U.K.	U.S.
Being a reliable source of useful and accurate information	47	59	72	35	46	63	18	41	61	40	39	46
Doing original, investigative reporting to help you understand the full story behind the pandemic and its potential lasting impact on the economy and on peoples' lives	46	54	69	40	41	63	18	41	59	38	38	46
Meeting your overall expectations for how they should be responding in this crisis	45	57	73	36	43	61	12	41	61	35	35	45
Correcting false information about the virus and making sure misinformation does not spread	43	49	68	34	39	60	16	41	62	33	28	43
Partnering and collaborating with other organizations and institutions to mount the strongest and most effective response to the pandemic possible	41	45	71	33	37	57	10	39	56	32	27	40
Holding other social institutions such as business and government accountable for their failures in responding to the pandemic	41	48	68	28	34	58	11	41	54	31	36	44
Not allowing politics and ideological biases to affect how they report pandemic news and information	40	48	69	30	38	56	12	35	56	30	31	38

## DATA IN DETAIL

# FULL QUESTION TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

**BUS\_TRST.** If a company or business were to do each of the following, how would it impact your trust?

- Donating needed equipment to hospitals, healthcare facilities, and educators
- Staying in daily contact with local authorities and public health officials in order to be as responsive as possible to emerging pandemic-related needs and challenges
- Cooperating and collaborating with companies that are normally their competitors if it can result in faster development of more effective responses to the pandemic
- Putting more money into research and innovation to help develop new solutions to our pandemic-related challenges

**CEO\_CHOICE.** You are about to see two choices. We want you to choose **the one that best describes how you want CEOs to respond to the pandemic.**

- CEOs should be aggressive in getting their companies back to normal operations even if it means reopening workplaces and bringing people back to work sooner than most health officials recommend / CEOs should be conservative in getting their companies back to normal operations even if it means waiting longer to reopen workplaces and bring people back to work until the virus has been completely brought under control

**CRISIS\_LEAD.** The current pandemic places many demands on our leaders. Which of the leaders listed below do you believe are doing an outstanding job meeting the demands being placed upon them by this crisis?

- Your national government leader
- Your state or local government leaders
- CEOs and business leaders in general
- The CEO or head of the organization you work for
- Heads of non-governmental organizations (NGOs)
- Global health authorities and the people who run major health organizations (WHO, CDC)
- Journalists and news anchors
- Academics and scientists

**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”.

- I am very concerned about losing, or having lost my job, due to the pandemic and not being able to find a new one for a very long time

**CV1\_Q13.** Please indicate how much you trust each of the following sources to tell you the truth about the virus and its progression. Use 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”.

- WHO (World Health Organization) officials
- Your doctor or healthcare provider
- The leader of your country
- Local government leaders
- The news media
- CEOs of companies in the health and healthcare business
- A non-profit organization or NGO representative
- A government official
- A person like yourself
- Doctors and other health experts you follow online
- Scientists
- Journalists
- The CEO of the organization you work for
- Social media influencers that you follow online

## DATA IN DETAIL

# FULL QUESTION TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

**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**.

- 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 / We are approaching the point where 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
- The government is restricting my freedom of movement and my ability to gather with others more than it should be allowed to in response to the pandemic / Any current pandemic-related restrictions on my freedom of movement and ability to gather with others are entirely reasonable and appropriate

**GOV\_TRST.** If the government were to do each of the following, how would it impact your trust?

- Require health screenings for anyone trying to enter the country even after the pandemic is over
- Restrict immigration and international travel even after the pandemic is over to help prevent any new disease outbreaks from getting into the country

- Greatly increase its spending on healthcare, healthcare services and building up our hospitals' intensive care unit capacity
- Ensure that necessary medical and emergency response supplies and equipment are being made in this country so that we will never need to rely on other countries in a crisis

**NEW\_PER\_NATGOV.** When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe the national government of your country is currently doing each of the following? Please indicate your answer using the 5-point scale below.

- Ensuring that medical supplies and good quality medical treatment are available even in the poorest areas

**NEW\_PER\_BUS.** When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe business in general is currently doing each of the following? Please indicate your answer using the 5-point scale below.

- Implementing safety measures to protect both workers and customers

**PER\_BLF.** 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**".

- This pandemic has made me realize just how big the gap in this country is between the rich and the working class, and that something needs to be done to more fairly distribute our country's wealth and prosperity across the population

## DATA IN DETAIL

# FULL QUESTION TEXT FOR ANSWER CHOICES THAT WERE ABBREVIATED IN THE REPORT

**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 9-point scale where one means that you “**do not trust them at all**” and nine means that you “**trust them a great deal**”.

- The central/federal government
- Your local/state government

**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**”.

- Automation and/or other innovations taking your job away
- Your job being moved to other countries where workers are paid less
- Cheaper foreign competitors driving companies like yours out of business
- Immigrants who will work for less competing for your job
- Not having the training and skills necessary to get a good paying job
- International conflicts about trade policies and tariffs hurting the company you work for

- Losing your job as a result of a looming recession  
Permanent jobs with benefits being replaced by freelance, gig-economy or short-term jobs that do not offer benefits
- Permanent jobs with benefits being replaced by freelance, gig-economy or short-term jobs that do not offer benefits
- People like you losing the respect and dignity you once enjoyed in this country

**WHOSE\_JOB.** There are many challenges associated with facing a pandemic. In meeting those challenges people will need to rely on 5 key societal institutions -- business, government, the media, NGOs and global health authorities. We are interested in knowing which one or more of these five institutions you expect to take a leading role in addressing each of the challenges below.

- Developing treatments and a vaccine for COVID-19
- Developing and putting in place the necessary policies and procedures to slow and control the spread of the virus
- Feeding the poor, the newly unemployed, and others who cannot easily get access to or afford food
- Creating tools and services that make it easier for people to stay productive and emotionally connected while living in lockdown
- Keeping people well-informed about the latest thinking on how to avoid catching the virus, the availability of tests, and progress towards finding a cure

- Keeping people well-informed about where to go to get help and support and how to access any government assistance available to help them cope with the financial impact of the pandemic
- Giving financial relief and support to people who have lost their jobs or livelihood
- Keeping the country's economy running as well as possible
- Helping small businesses survive until they can reopen
- Developing guidelines for when it is okay to start relaxing social distancing requirements so that people can begin returning to work, schools can be reopened, and people can start to engage in group activities again
- Planning and preparing for how the country will get back to normal after the worst of the pandemic is over

# ANALYSIS IN DETAIL

## INSTITUTIONAL COMPETENCE AND ETHICS SCORES

In our May Spring Update to the 2020 Trust Barometer, we asked: “When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe [INSTITUTION] is currently doing each of the following?”

All scores are based on a net of the top 2 box (doing this very well or doing this well), minus the bottom 3 box (doing mediocre on this, doing poorly on this, or failing at this) responses to the question.

Where an institution was placed along the competence

(horizontal) or ethical (vertical) dimension has determined by its average net score across its relevant items, detailed in the chart below. Positive average nets placed the institution to the right of the vertical or above the horizontal, and negative nets placed the institution to the left of the vertical or below the horizontal.

Please note that this analysis is not meant to be read as plotted data on an X-Y axis. The institutions were placed in one of the four quadrants based on whether their overall competence and ethics scores were positive or

negative. The arrows represent an approximation of the direction of movement for each institution based on where their general performance was prior to the pandemic versus where they are today, based specifically on their performance in response to the pandemic to date. Because the questions used to determine competence and ethics were not the same across the two studies, this chart should be viewed as a qualitative rather than a quantitative representation of relative performance.

BUSINESS	GOVERNMENT	MEDIA	NGOs
COMPETENCE ITEMS			
<ul style="list-style-type: none"><li>Protecting essential employees</li><li>Ensuring that the products and services that people need most are readily available</li></ul>	<ul style="list-style-type: none"><li>Taking care of people who are suffering pandemic-related financial hardships</li><li>Developing solutions to our pandemic-related medical problems and challenges</li><li>Preparing for the eventual recovery</li></ul>	<ul style="list-style-type: none"><li>Being a reliable source of useful and accurate information</li><li>Doing original, investigative reporting to help you understand the full story behind the pandemic and its potential lasting impact</li><li>Correcting false information about the virus</li><li>Holding other social institutions such as business and government accountable</li></ul>	<ul style="list-style-type: none"><li>Coordinating local relief efforts</li><li>Raising money for pandemic relief efforts</li><li>Coordinating global efforts to combat and control the spread of the virus</li><li>Being a reliable source of useful and accurate information</li><li>Taking care of people who are suffering pandemic-related financial hardships</li><li>Developing solutions to our pandemic-related medical problems and challenges</li></ul>
ETHICS ITEMS			
<ul style="list-style-type: none"><li>Putting people before profits</li><li>Helping their smaller suppliers and business customers stay in business</li><li>Protecting their employee’s financial wellbeing and safeguarding their jobs</li></ul>	<ul style="list-style-type: none"><li>Putting aside political partisanship and working across ideological divides to get things done</li><li>Ensuring that medical supplies and good quality medical treatment are available even in the poorest areas</li></ul>	<ul style="list-style-type: none"><li>Not allowing politics and ideological biases to affect how they report pandemic news and information</li></ul>	<p><i>NOTE: There were no ethics performance items asked for NGOs, so for the purposes of this analysis we assumed that the NGO ethics score stayed the same as it was in January</i></p>