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%

---

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. 8-mkt avg.

2020 Edelman Trust Barometer Special Report: Trust and the Coronavirus. Q3. 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. Data shown is a net of r5 and r6. Question shown to those who have heard of the virus (Q1/1). Q10. How often would you like to be updated on the information you just indicated your employer should be sharing? Question shown to those who are aware of the virus and are employees and listed information their employer should be sharing (Q1/1 AND Q43/1 AND Q9/1-14,16). 10-mkt avg. Data collected between March 6 and March 10, 2020.
MAINTAINING BRAND TRUST DURING THE CORONAVIRUS

1. Show up and do your part

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.

2. Don’t act alone

There is strength in collaboration. To truly help people during this crisis requires a joining of forces with others, most critically government.

3. Solve, don’t sell

Brands should focus all efforts on finding appropriate and meaningful solutions to the problems people are facing today.

4. Communicate with emotion, compassion and facts

People are reassured by positive brand actions and commitments. Communicate with empathy to help both inform and calm.
2020 Edelman Trust Barometer
Special Report

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

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

Brazil 93  29  64
S. Africa 93  37  56
Italy 92  34  58
France 91  32  59
U.K. 91  38  53
Germany 90  39  51
S. Korea 90  38  52
Canada 89  40  49
China 89  47  42
U.S. 89  45  44
Japan 87  49  38
India 86  31  55
### PRODUCE PRODUCTS THAT CAN HELP

Percent who want each from brands

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percent who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brands must do this to earn or keep my trust</td>
<td>89%</td>
</tr>
<tr>
<td>Shift to producing products that help people meet the challenges</td>
<td></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>

*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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>90%</td>
<td>Partner with government and relief agencies <strong>to address the crisis</strong></td>
</tr>
<tr>
<td>86%</td>
<td>Be a safety net, stepping in where they are needed and able, to <strong>fill gaps in the government’s response</strong> to the virus</td>
</tr>
</tbody>
</table>

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.
In the face of this coronavirus outbreak, what roles do you expect brands to play? (Q3/1)

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

<table>
<thead>
<tr>
<th>Global 12</th>
<th>Brazil</th>
<th>S. Africa</th>
<th>S. Korea</th>
<th>India</th>
<th>China</th>
<th>Canada</th>
<th>Italy</th>
<th>U.K.</th>
<th>Japan</th>
<th>U.S.</th>
<th>France</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>92%</td>
<td>91%</td>
<td>88%</td>
<td>87%</td>
<td>85%</td>
<td>84%</td>
<td>81%</td>
<td>80%</td>
<td>79%</td>
<td>79%</td>
<td>77%</td>
<td>74%</td>
</tr>
<tr>
<td>28%</td>
<td>64%</td>
<td>55%</td>
<td>54%</td>
<td>53%</td>
<td>44%</td>
<td>46%</td>
<td>40%</td>
<td>47%</td>
<td>49%</td>
<td>45%</td>
<td>42%</td>
<td>42%</td>
</tr>
</tbody>
</table>

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

Data collected between March 23 and March 26, 2020.

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%

39% 46%

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**

- 83%
  - 32%
  - 51%

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

- 84%
  - 34%
  - 50%

---

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 **emphasizing empathy and support** for those most affected by the pandemic

![Chart showing the percentage of people who want brands to show care and the values by country.](chart.png)

83%

Global 12


34% 49%

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

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

57%

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>53</td>
<td>49</td>
<td>46</td>
<td>43</td>
<td>39</td>
<td>37</td>
<td>34</td>
<td>28</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>36</td>
<td>50</td>
<td>46</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>18</td>
<td>26</td>
<td>22</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>9</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>10</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>18</td>
<td>5</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></td>
<td>16</td>
<td>17</td>
<td>13</td>
<td>14</td>
<td>11</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>If I see it here, I will</td>
<td>18</td>
<td>46</td>
<td>59</td>
<td>53</td>
<td>51</td>
<td>46</td>
<td>41</td>
<td>38</td>
</tr>
<tr>
<td>automatically assume it true</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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
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 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

37%

Global 12

<table>
<thead>
<tr>
<th>Country</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>82</td>
</tr>
<tr>
<td>India</td>
<td>60</td>
</tr>
<tr>
<td>S. Korea</td>
<td>52</td>
</tr>
<tr>
<td>Brazil</td>
<td>46</td>
</tr>
<tr>
<td>Italy</td>
<td>33</td>
</tr>
<tr>
<td>S. Africa</td>
<td>30</td>
</tr>
<tr>
<td>U.S.</td>
<td>29</td>
</tr>
<tr>
<td>Canada</td>
<td>26</td>
</tr>
<tr>
<td>U.K.</td>
<td>24</td>
</tr>
<tr>
<td>Japan</td>
<td>21</td>
</tr>
<tr>
<td>France</td>
<td>20</td>
</tr>
<tr>
<td>Germany</td>
<td>19</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.
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

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>Percent 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>

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.
MAINTAINING BRAND TRUST DURING THE CORONAVIRUS

1. **Show up and do your part**

   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.

2. **Don’t act alone**

   There is strength in collaboration. To truly help people during this crisis requires a joining of forces with others, most critically government.

3. **Solve, don’t sell**

   Brands should focus all efforts on finding appropriate and meaningful solutions to the problems people are facing today.

4. **Communicate with emotion, compassion and facts**

   People are reassured by positive brand actions and commitments. Communicate with empathy to help both inform and calm.