

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%

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.

A NEED FOR BUSINESS AND EMPLOYERS TO STEP UP

Percent who say

78%

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

63%

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

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

⊥

62%

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

⊥

55%

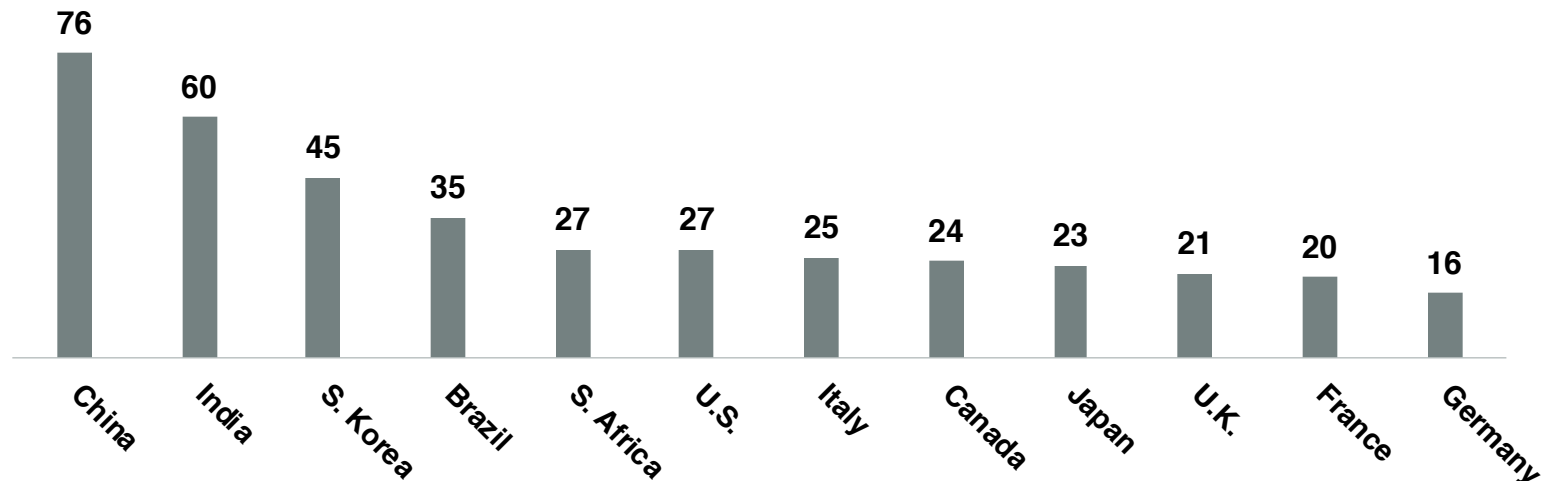
1 IN 3 HAVE ALREADY PUNISHED BRANDS THAT DID NOT RESPOND WELL

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



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**FOCUS ON SOLUTIONS,
NOT SELLING**

└

PROTECT EMPLOYEES AT ALL COSTS

Percent who want this from brands

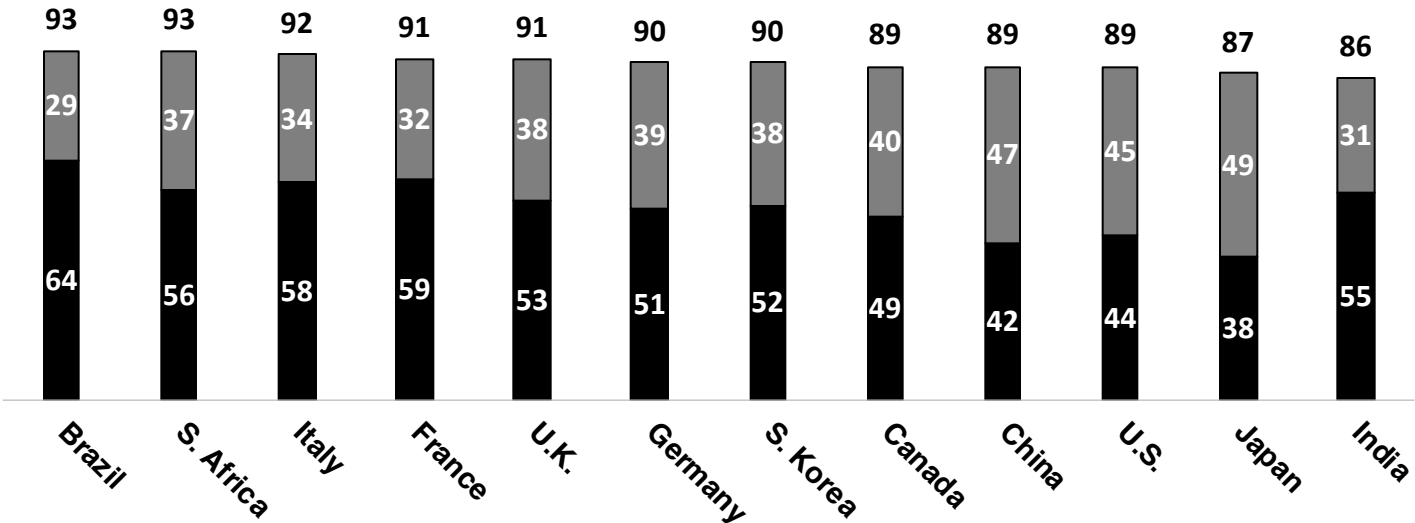
■ Brands must do this to earn or keep my trust □ I hope brands will do this, but there is no obligation

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



PRODUCE PRODUCTS THAT CAN HELP

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

Shift to producing products that **help people meet the challenges**

⊥

89%



Offer free or lower-priced products to health workers, high-risk individuals and those whose jobs have been affected

⊥

89%



Percent who agree

I am just not paying attention to new products right now **unless they are designed to help me with my pandemic-related life challenges**

⊥

54%

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%

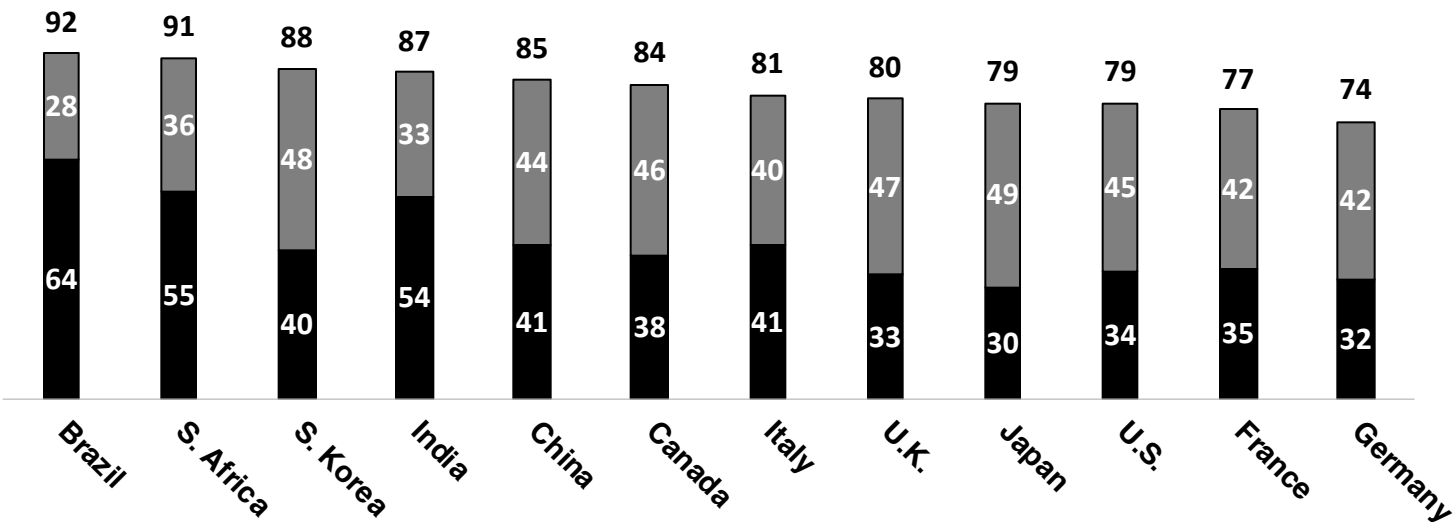
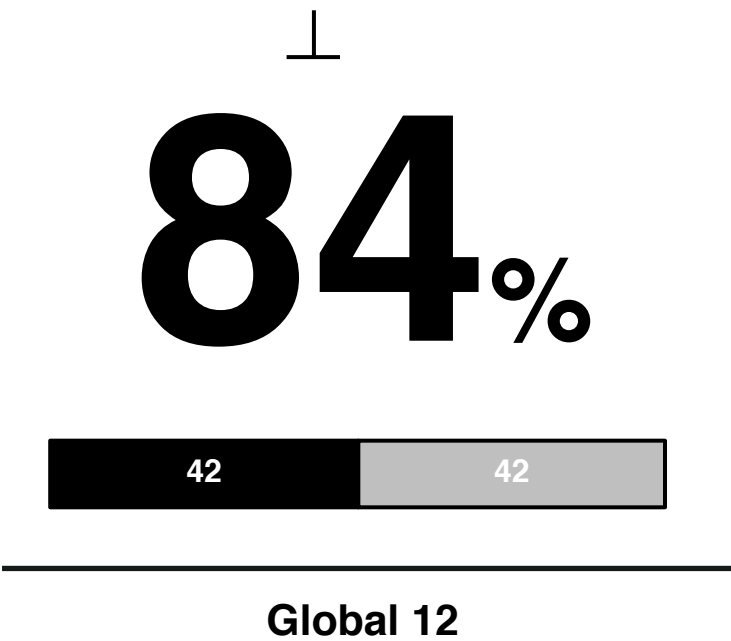


SERVE AS INFORMATION SOURCE

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



USE YOUR BRAND POWER TO EDUCATE

Percent who want brands to play this role

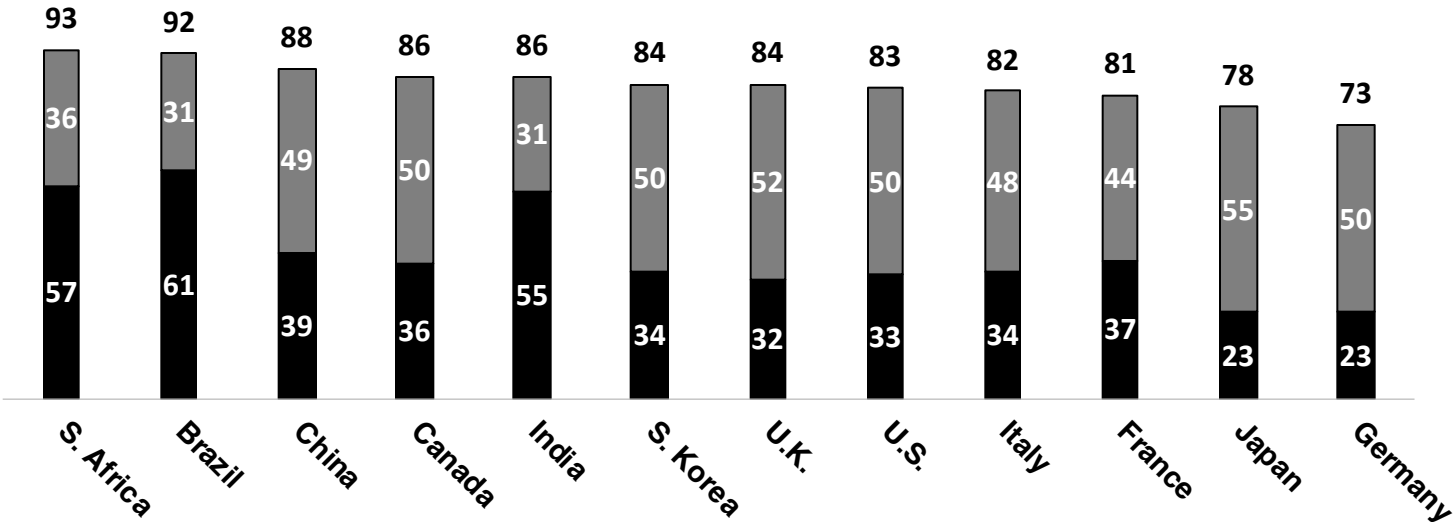
■ Brands must do this to earn or keep my trust □ I hope brands will do this, but there is no obligation

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

└
85%



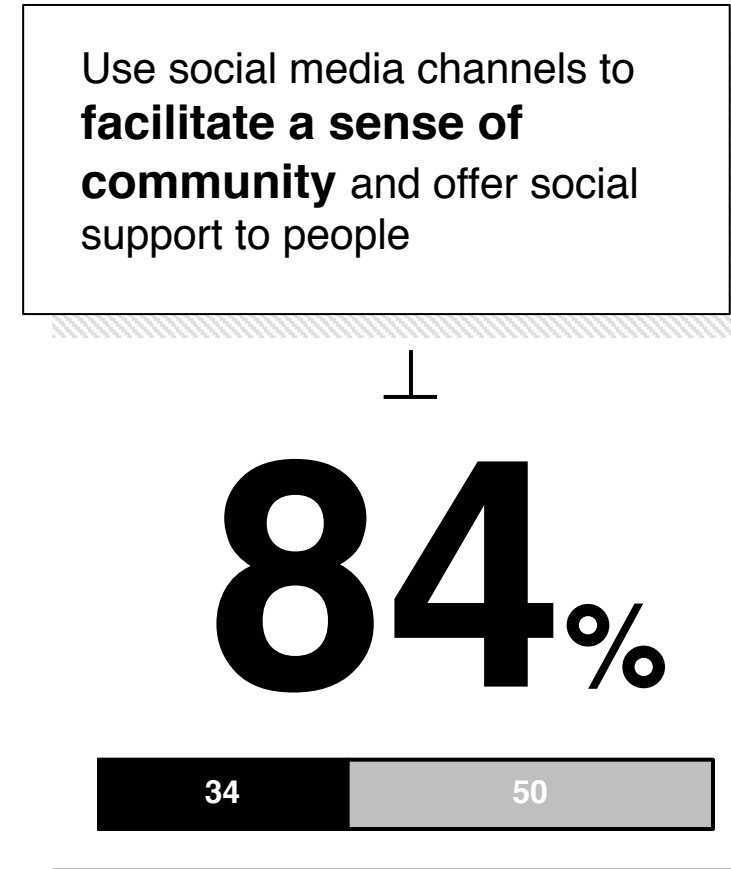
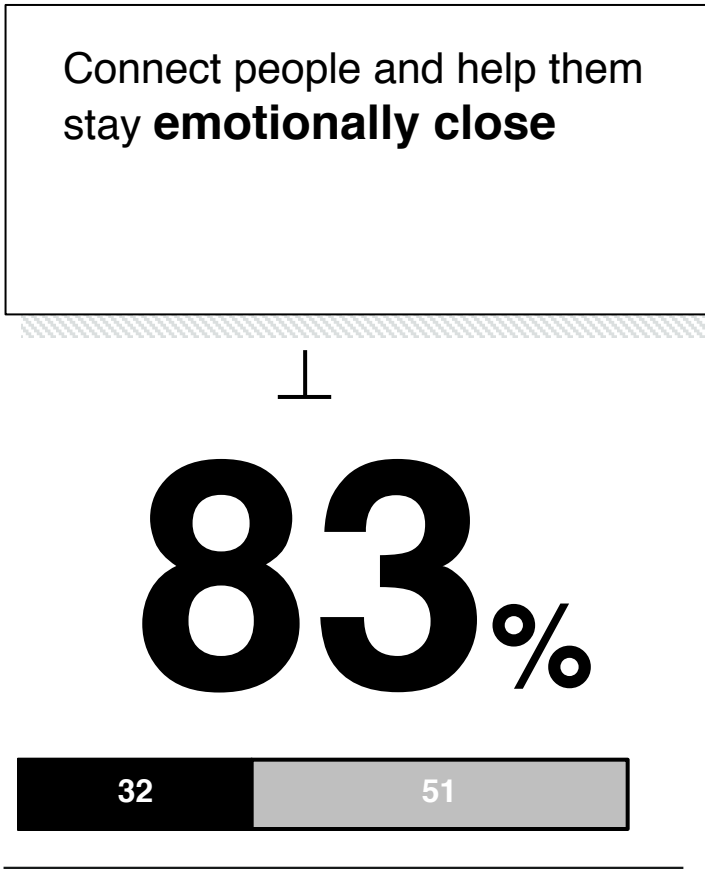
Global 12



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



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**

T

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

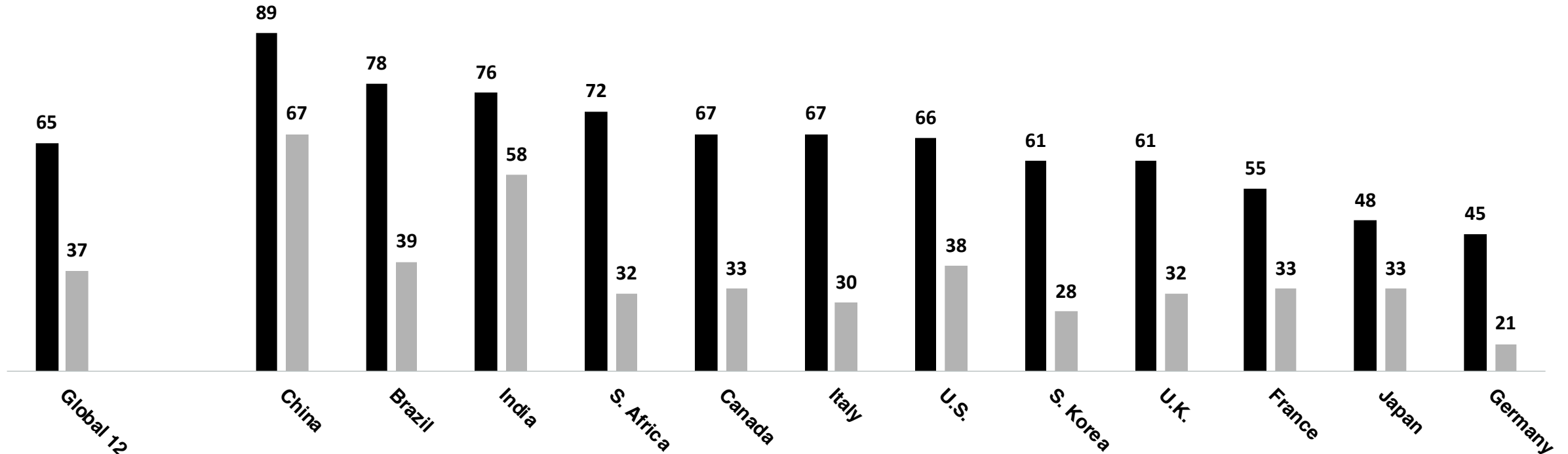
2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q5. In the face of this coronavirus outbreak, how do you expect brands to react when it comes to the nature and tone of their communications with the public? 3-point scale; code 1, brands must do this; code 2, I hope brands will 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**



SHOW THAT YOU CARE

Percent who want this from brands

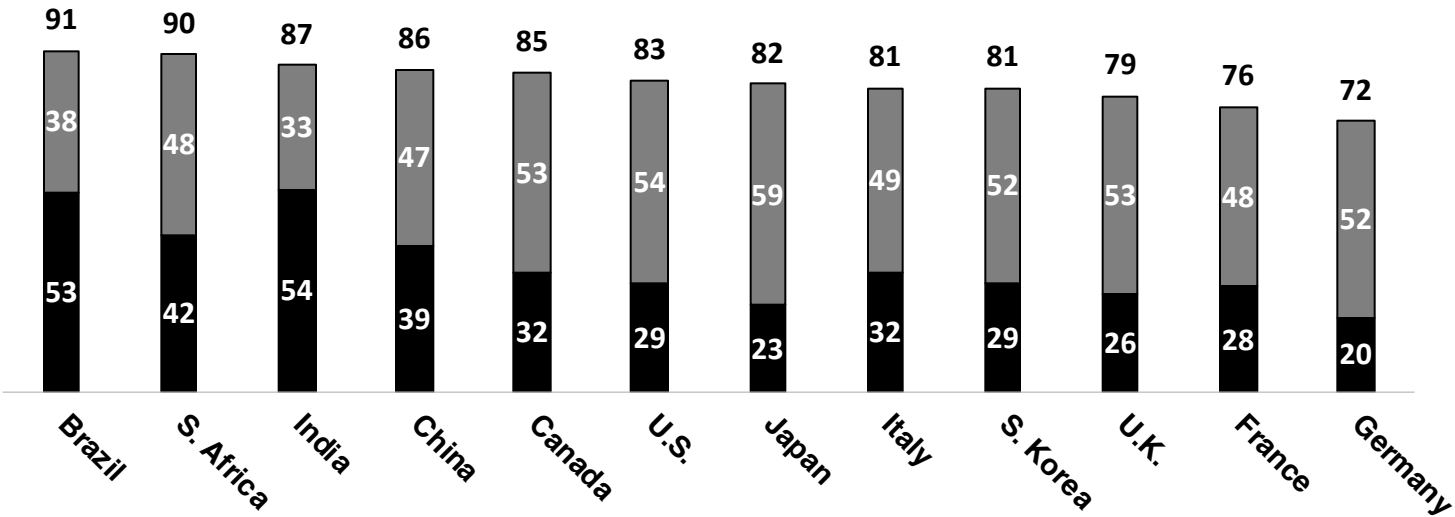
■ Brands must do this to earn or keep my trust □ I hope brands will do this, but there is no obligation

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

83%



Global 12



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%



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

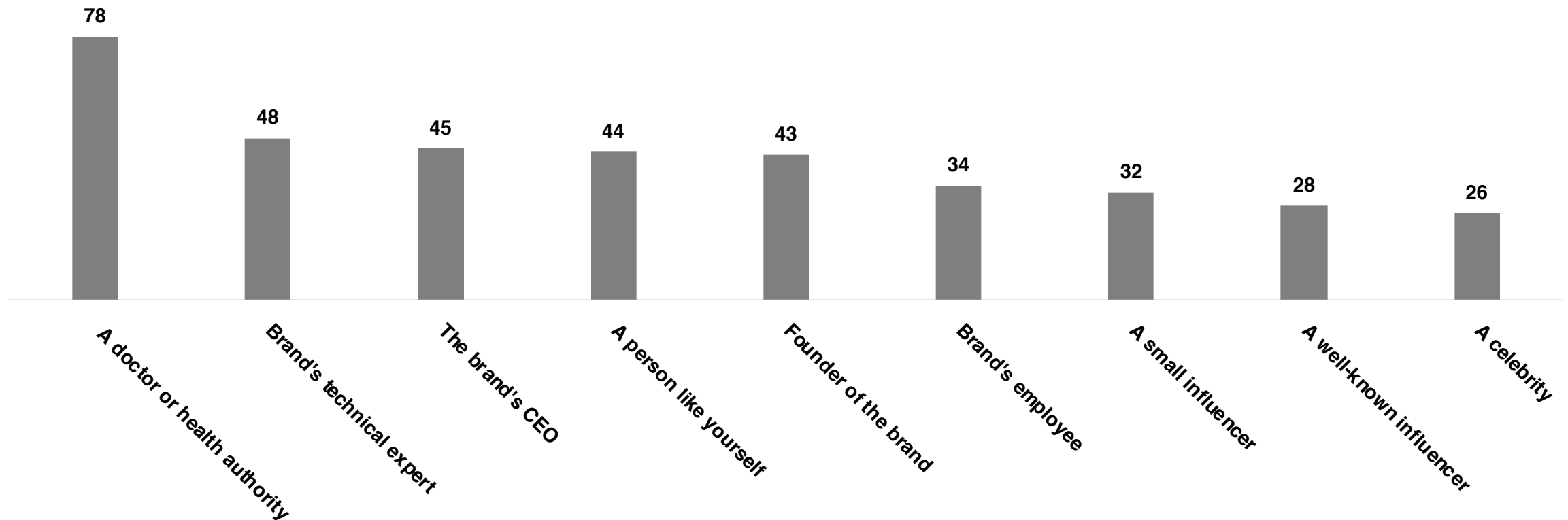
⊥
77%



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



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

⊥
57%



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

⊥
42%

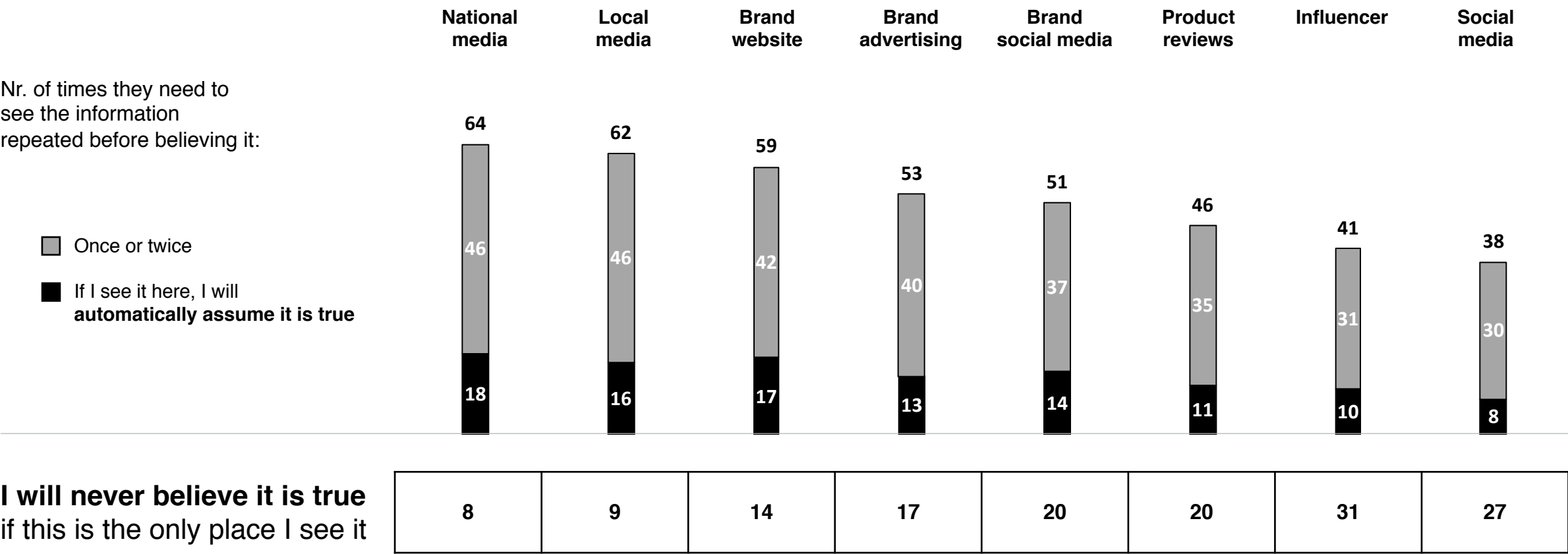
USE TRADITIONAL MEDIA, EMAILS AND OWNED CHANNELS TO COMMUNICATE ABOUT YOUR RESPONSE TO THE PANDEMIC

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

		India	Japan	S. Africa	Brazil	S. Korea	China	Italy	Canada	Germany	U.S.	France	U.K.
TV, radio or newspapers	 45	66	54	54	53	49	46	43	39	39	37	34	28
Email	 42	55	27	54	40	22	28	34	54	36	50	46	64
The brand's website	 33	49	31	39	40	15	47	29	36	28	28	22	34
Facebook	 31	65	9	48	49	19	18	38	28	18	26	22	25
Instagram	 21	47	9	27	46	17	17	19	16	12	15	9	13
Twitter	 19	47	20	28	28	9	19	13	15	7	14	10	14
Texts	 18	37	8	28	12	31	30	8	8	22	13	14	12
Streaming videos	 17	46	6	19	22	14	45	12	9	6	11	5	7
Regular mail	 11	30	3	16	5	14	18	5	14	5	12	6	10

EARNED MEDIA BELIEVED MOST READILY

Percent who report they believe coronavirus information from each source



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IMPACT FOR BRANDS

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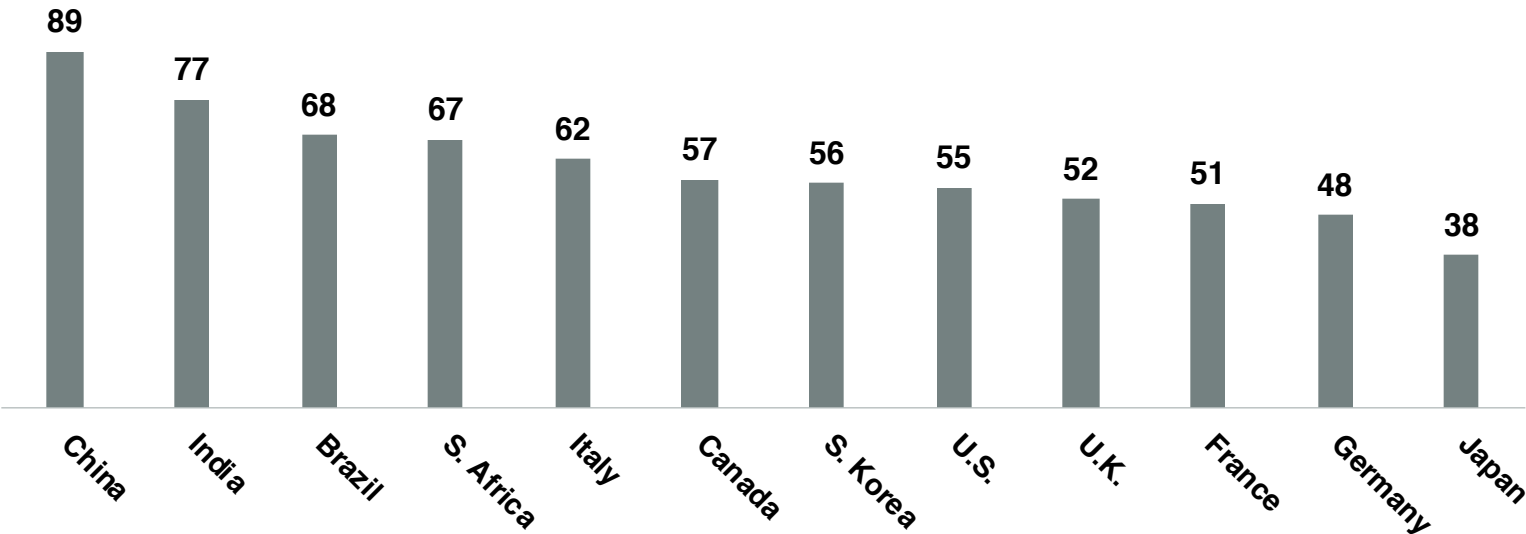
PEOPLE TURNING TO BRANDS THEY TRUST

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



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.

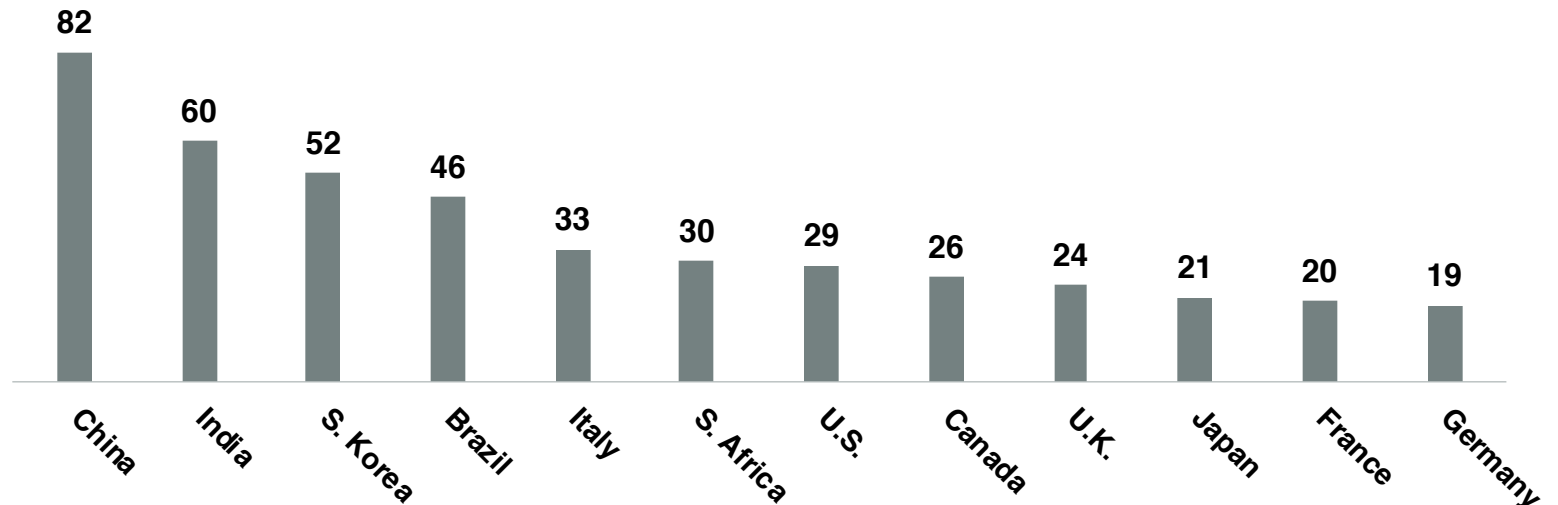
BRANDS' RESPONSE TO PANDEMIC ALREADY INFLUENCING PURCHASE

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



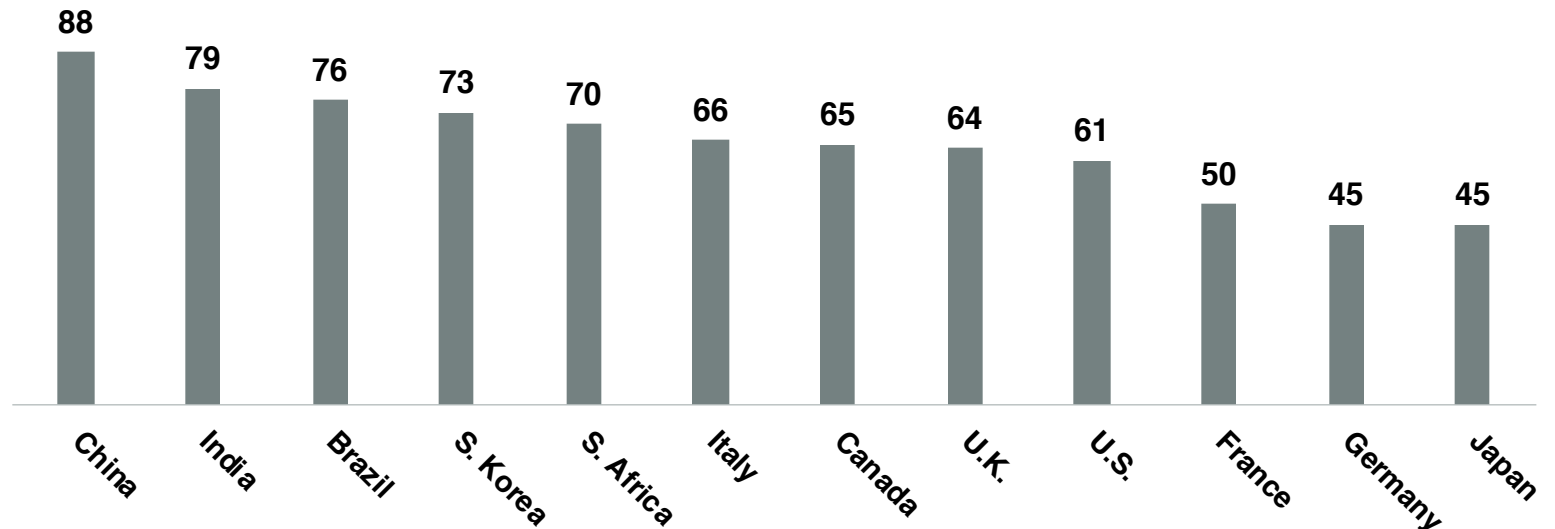
BRANDS' RESPONSE TO PANDEMIC WILL INFLUENCE FUTURE PURCHASE

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



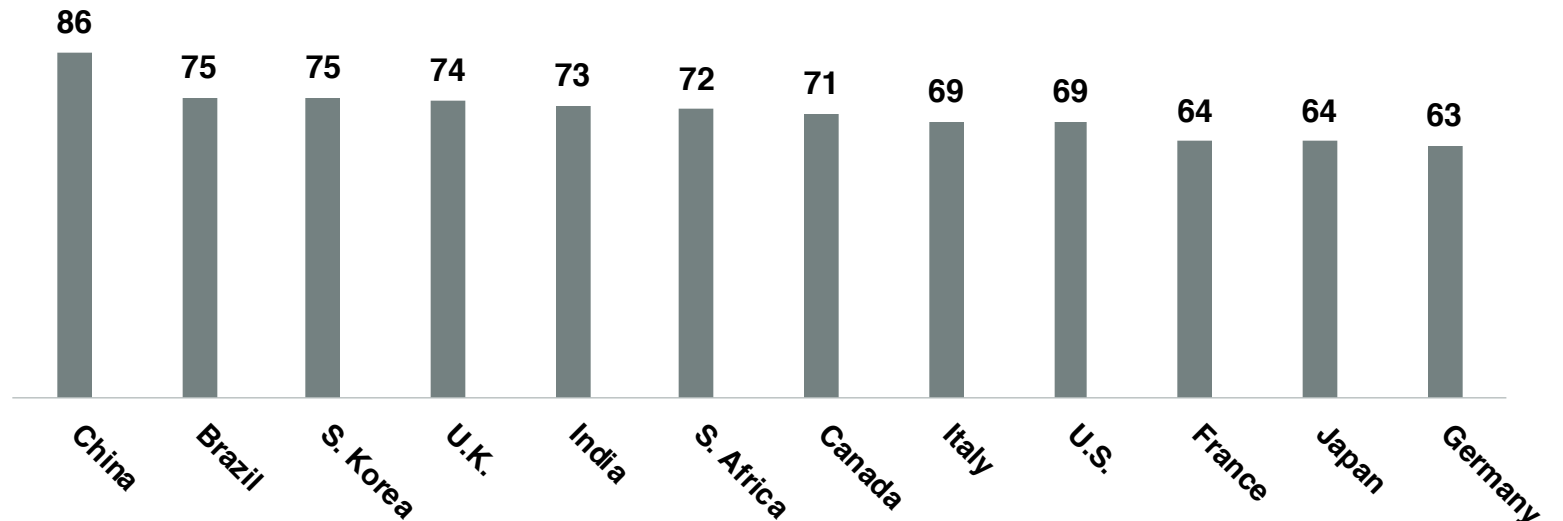
FUTURE OF BRAND TRUST AT RISK

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



MAINTAINING BRAND TRUST DURING THE CORONAVIRUS

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

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