

Spring Update:  
Trust and the  
Covid-19 Pandemic

U.K. Findings

## Edelman Trust Barometer 2020



## 2020 Edelman Trust Barometer

# 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+).

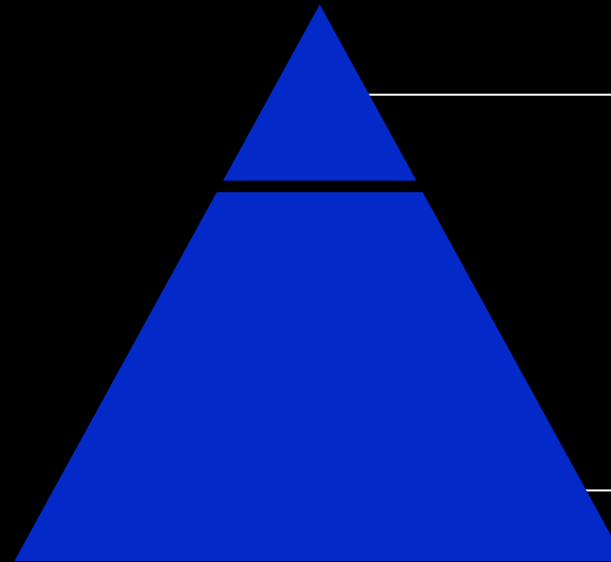
Market-specific data margin of error: General population +/- 2.8% (N=1,200), informed public +/- 9.8% (N=100), mass population +/- 2.9% to 3.7% (N=min 691, varies by market).

## 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

↓

# A SHIFT IN TRUST: GOVERNMENT TAKES THE LEAD

↑

A black and white photograph of a building facade. The building has a classical architectural style with a decorative cornice featuring acanthus leaves. A street sign is mounted on the wall, reading "DOWNING STREET SW1" and "CITY OF WESTMINSTER". To the right, a large, ornate lantern with a glass enclosure and a decorative top is visible. The overall tone is serious and historical.

DOWNING  
STREET SW1  
CITY OF WESTMINSTER

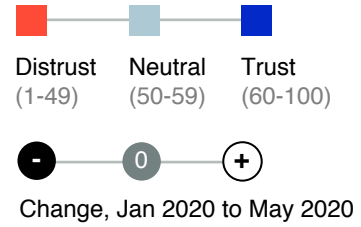
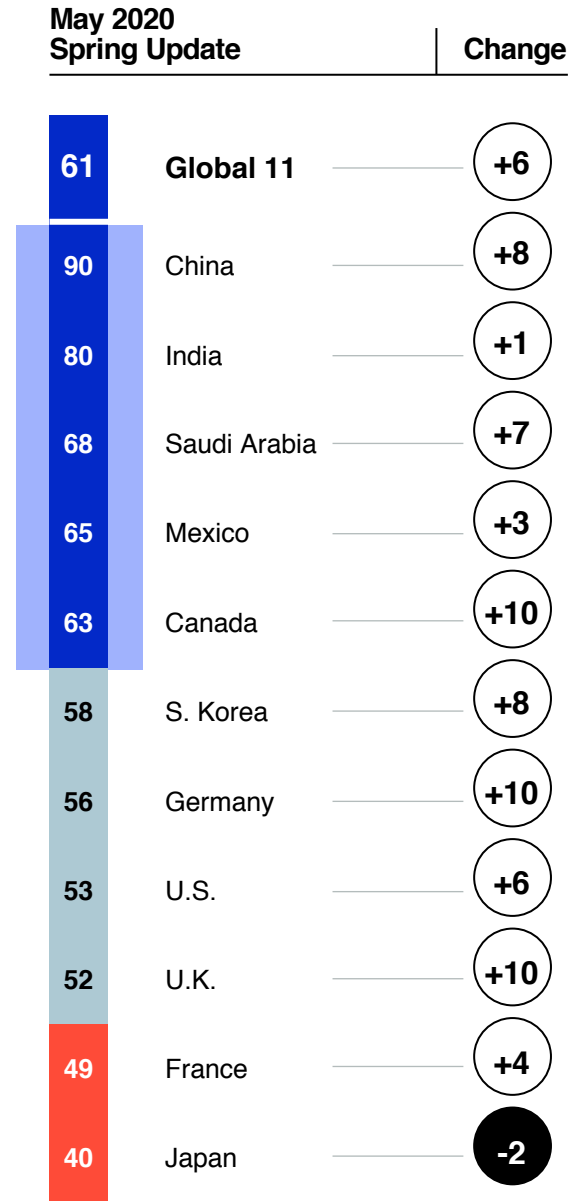
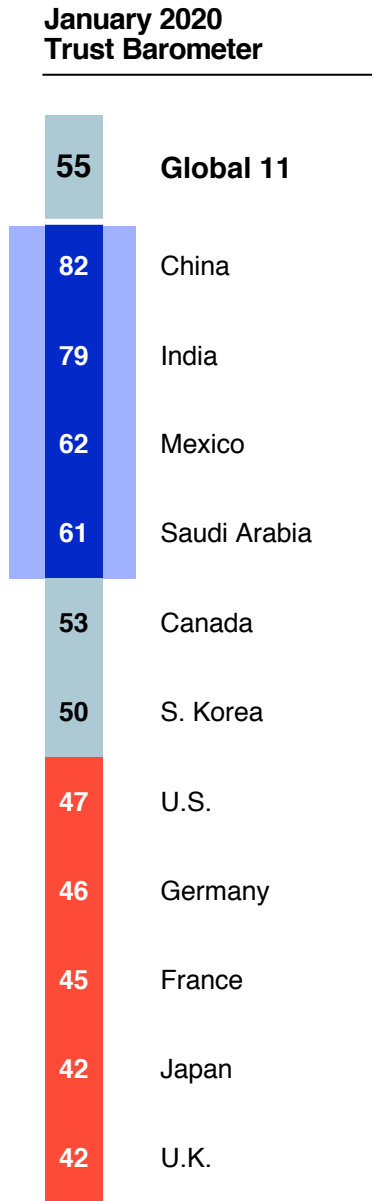
# A RECORD RISE IN TRUST; TRUST INDEX AT ALL-TIME HIGH

## 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

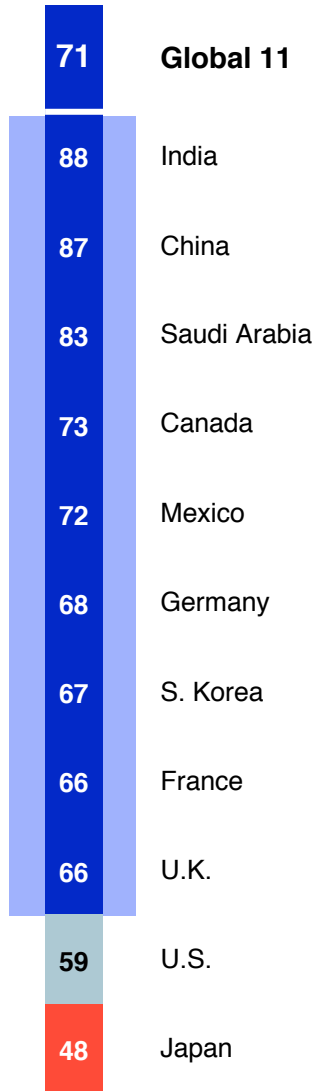
Trust Index

Informed public 13 points more trusting than the mass population

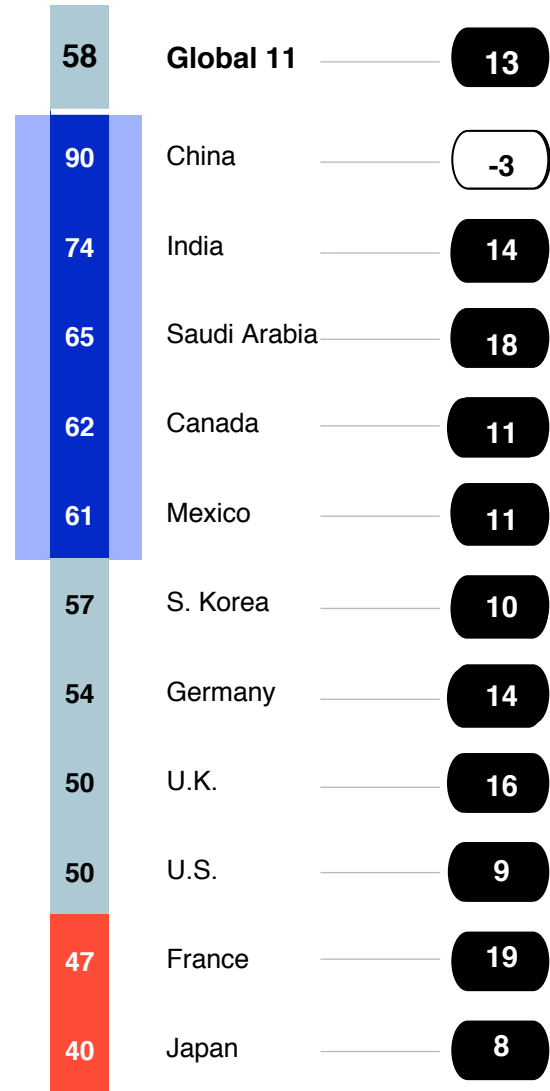
Double-digit trust inequality in 9 of 11 markets measured

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.

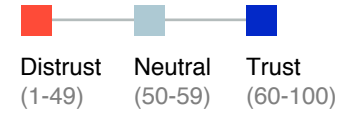
△ 2020 Spring Update  
Informed public



▲ 2020 Spring Update  
Mass population



Trust gap

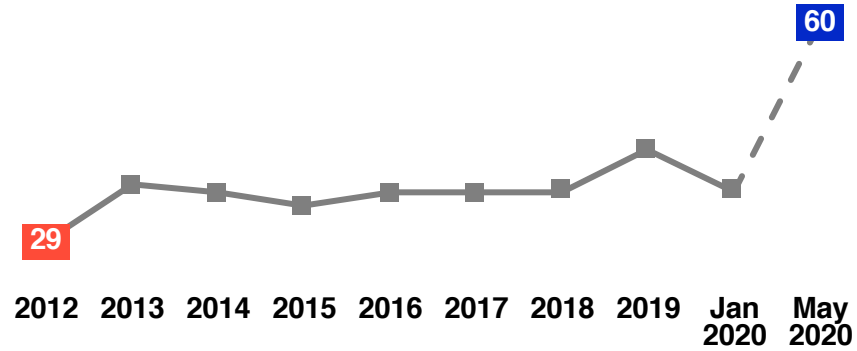


# RECORD HIGHS FOR ALL INSTITUTIONS

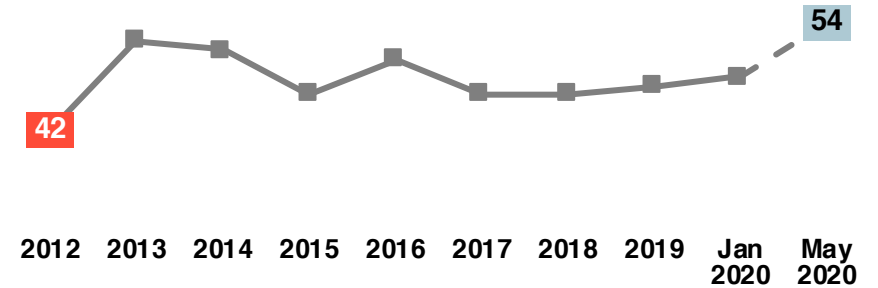
Percent trust (U.K.)

■ — ■ — ■  
 Distrust Neutral Trust

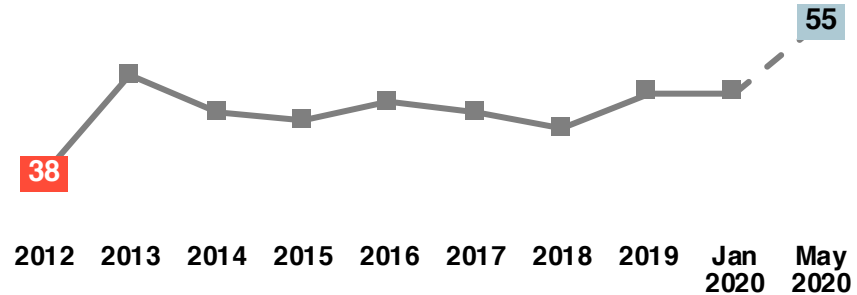
## Government



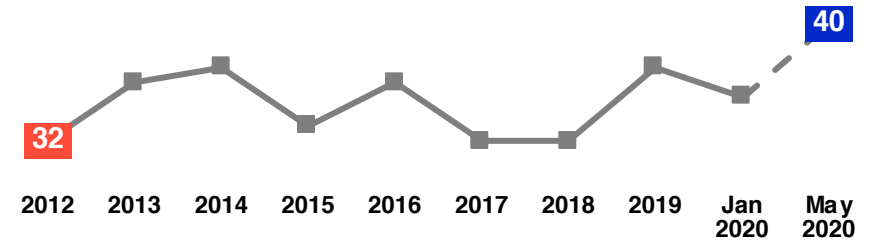
## NGOs



## Business

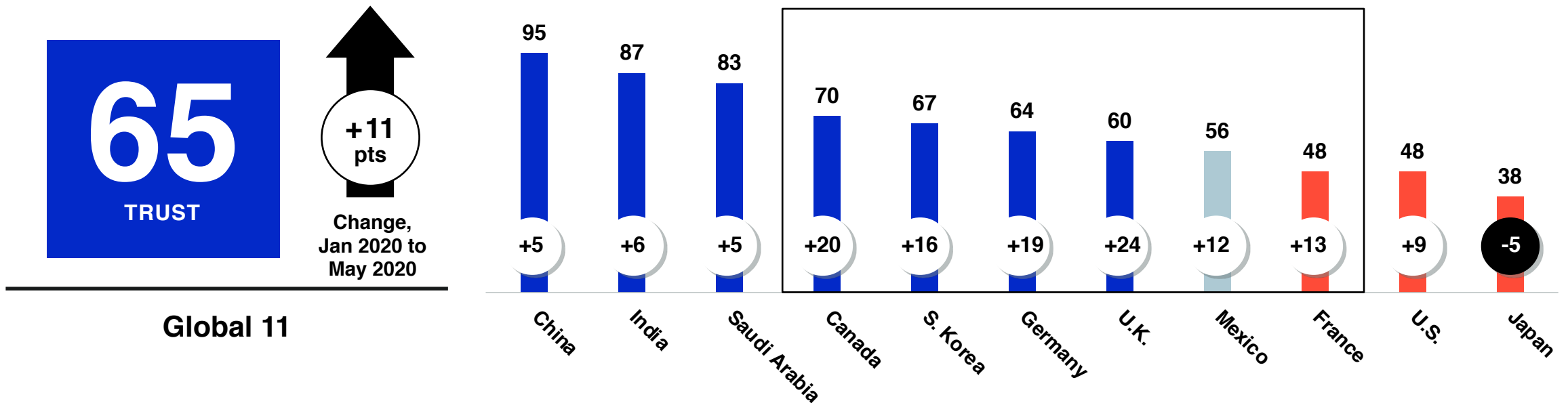


## Media



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

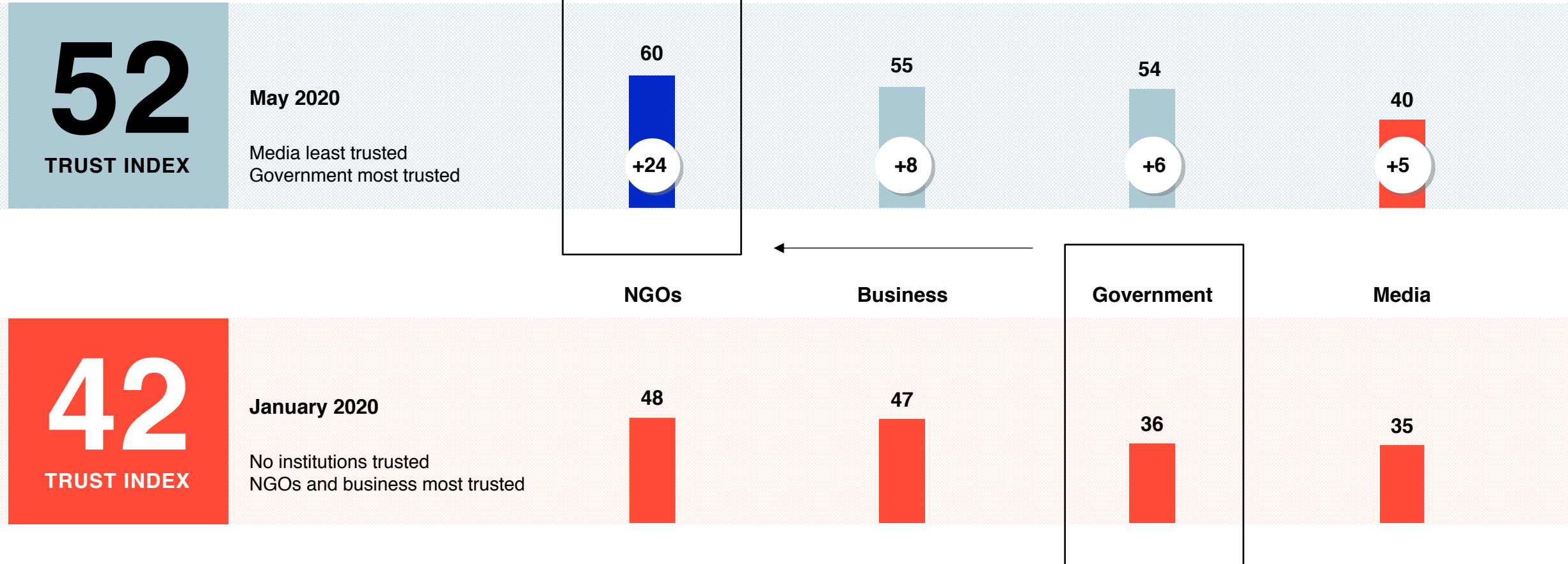
Percent trust in government



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

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

Percent trust



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, U.K.





# LARGE TRUST GAINS OFTEN QUICKLY LOST

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%)

**Trust loss one year after double-digit gain**  
No trust loss one year after large gain

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

⊥



# FAKE NEWS CONCERNS ADD TO INSTABILITY

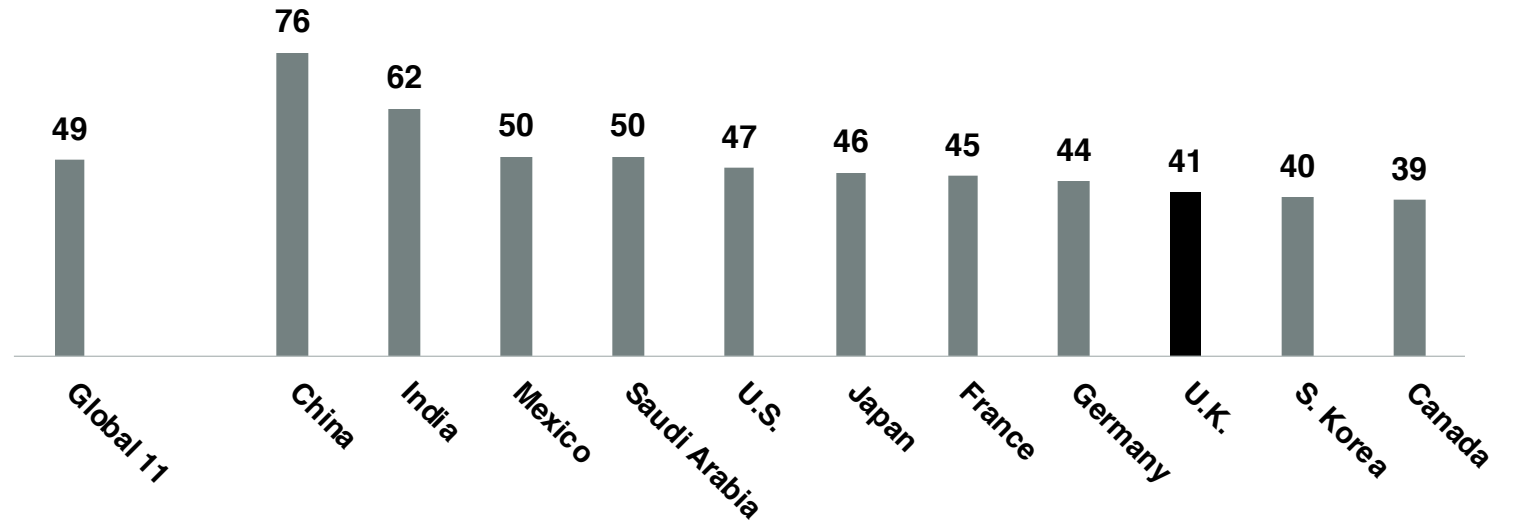
Percent who agree

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

⊥  
**65%**

(U.K.)

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



# PANDEMIC SPOTLIGHTS CLASS 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 needs to be done to more fairly distribute our country's wealth and prosperity**

⊥  
**57%**

**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

⊥  
**59%**

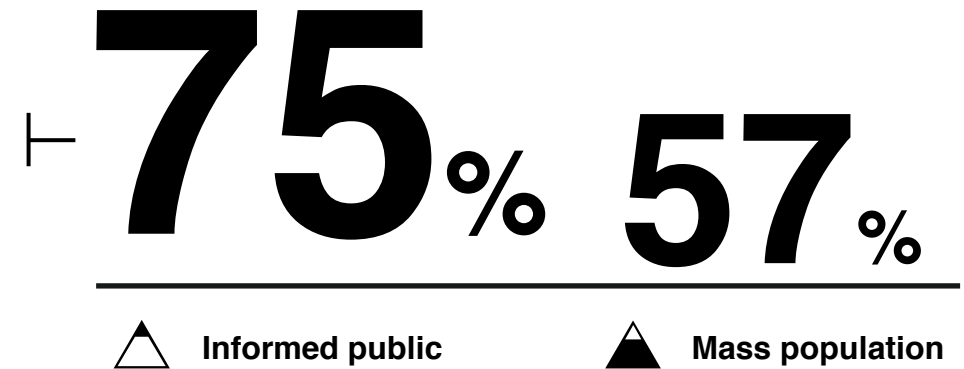
2020 Edelman Trust Barometer Spring Update. PER\_BLF. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. CV1\_POP. Please indicate your level of agreement with 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, U.K.



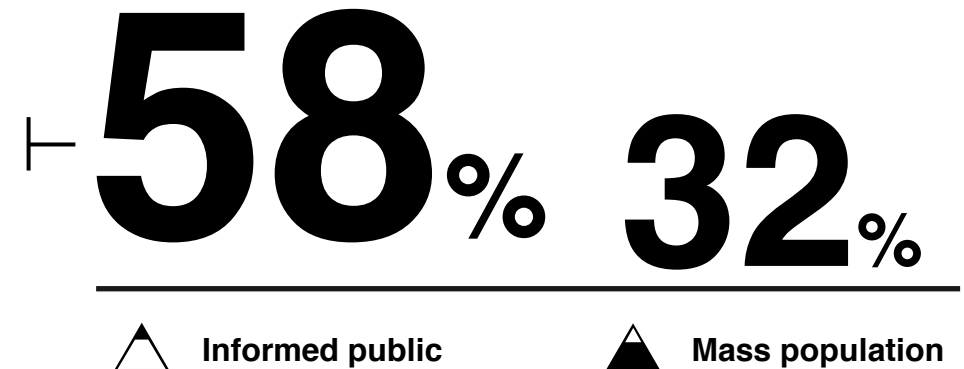
# INFORMED PUBLIC MORE CONCERNED ABOUT IMPACT OF VIRUS ON PEOPLE AND JOBS

Percent who agree

**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



**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



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# BIG MANDATE, BIG CHALLENGES FOR GOVERNMENT

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Thank you  
to our amazing 2015 staff  
#thankyouHSR  
JCDomix

↑ Underground 4  
↑ Overground  
← Toilets 4  
← Toilets Accessible, baby  
Tickets 4  
↑ Lift Way out, Underground and Bus station 4, 5  
↑ Way out  
By platform 4: Cycle racks 4  
Lost property by platform 4: Left Luggage 4



# GOOD MARKS FOR GOVERNMENT COMMUNICATIONS

Percent who agree

The government has communicated in a clear and easy to understand way **the restrictions they are imposing on people's movement**

⊥  
**71%**

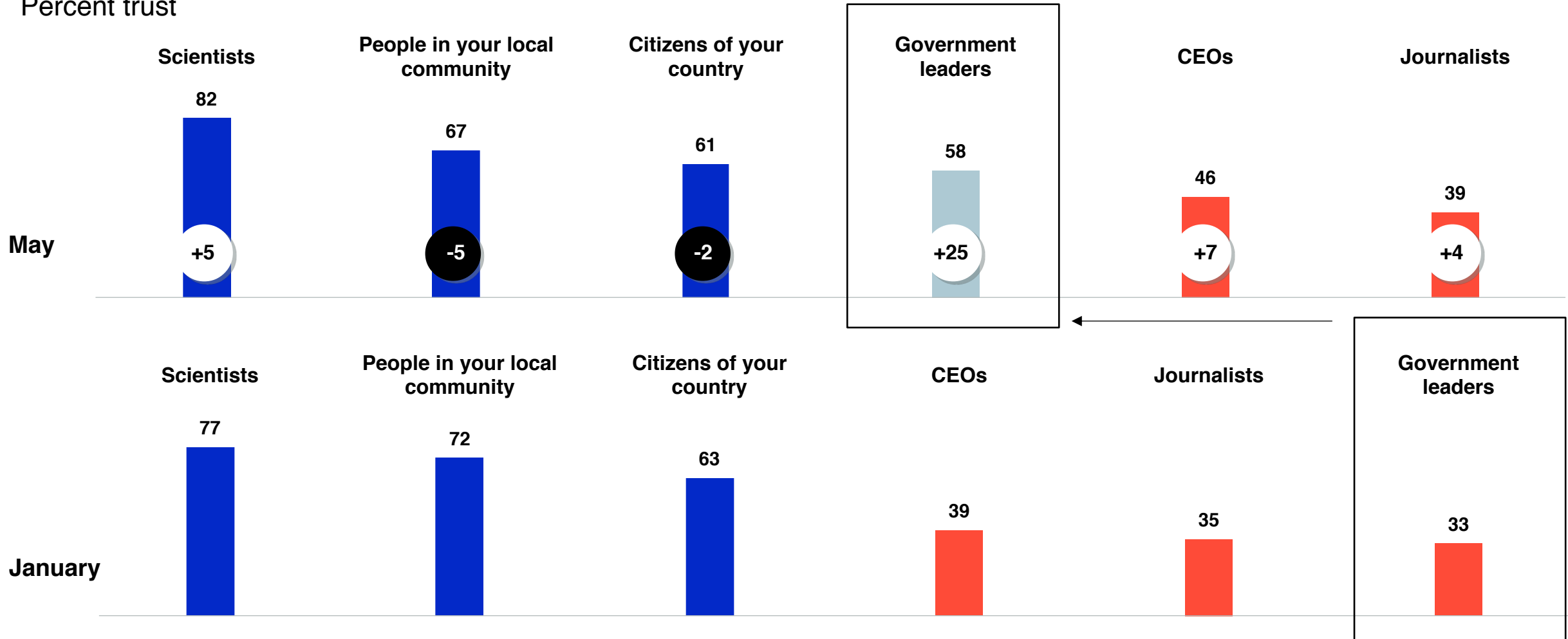
The government has communicated in a clear and easy to understand **way what programs and support are available** to people like me and how I go about accessing that support

⊥  
**62%**



# GOVERNMENT LEADERS NOW MORE TRUSTED THAN CEOS

Percent trust



2020 Edelman Trust Barometer Spring Update. TRU\_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. General population, U.K.





# 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.

# DISAPPOINTMENT OVER INITIAL GOVERNMENT RESPONSE

Percent who agree

**Our government failed us by not acting in a decisive manner** as soon as the threat became known to them

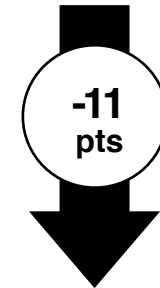


**58%**

**My country is well-prepared** for this viral outbreak



**35%**



**Change,  
Mar 2020 to  
May 2020**

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. LOC\_PREP. 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, U.K.



# U.K. GOVERNMENT SUCCESSFULLY PROTECTING ECONOMY

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

**Taking the necessary actions to keep the economy from collapsing**

⊥  
**52%**

doing this well or very well

**Being a reliable source of useful and accurate information**

⊥  
**51%**

doing this well or very well

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

⊥  
**46%**

doing this well or very well



# SAVING LIVES MORE IMPORTANT THAN SAVING JOBS

Which do you agree with more?

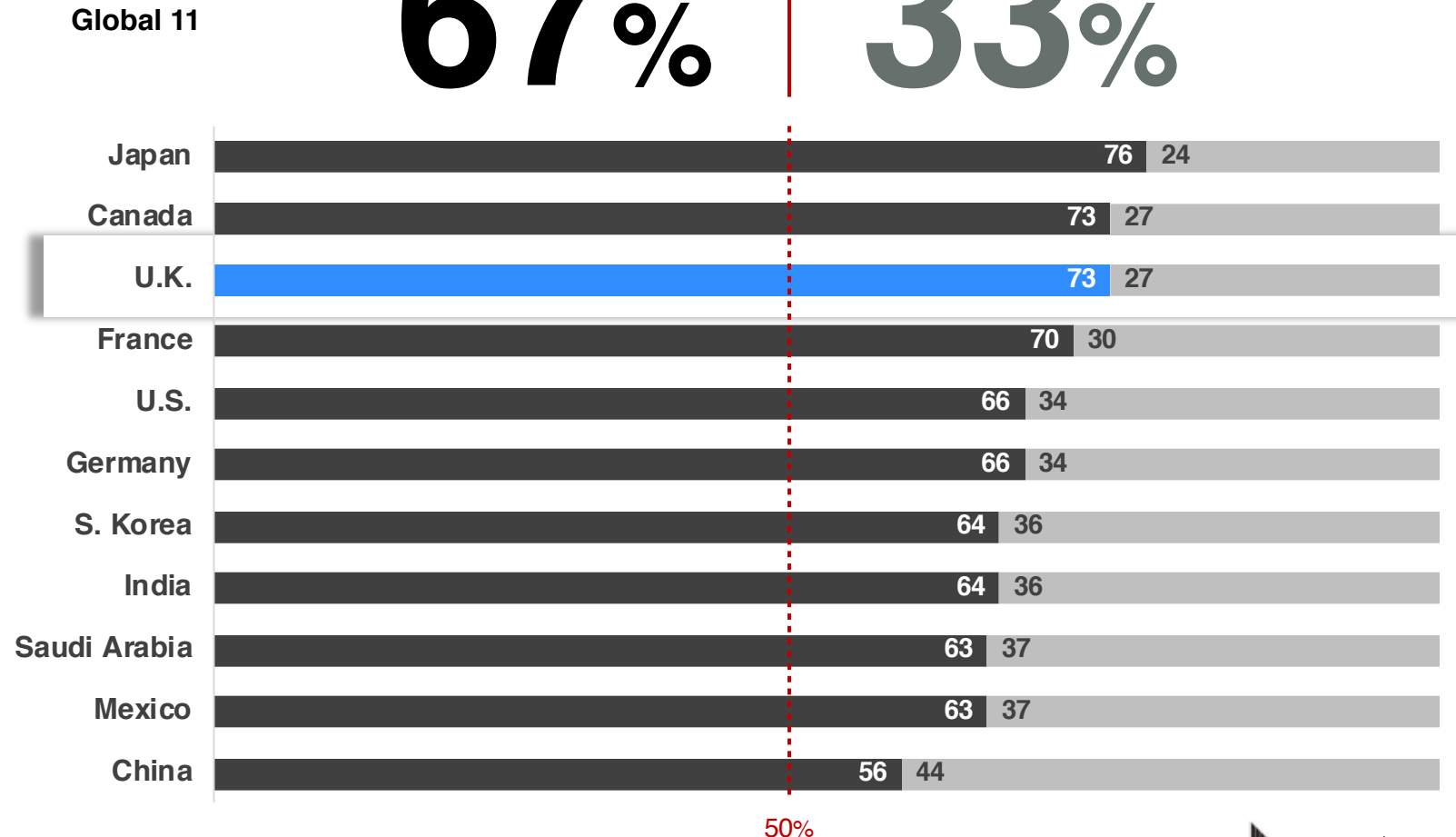
The government's highest priority should be **saving as many lives as possible**, even if it means the economy will sustain more damage and recover more slowly

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%



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.

# GOVERNMENT FAILING TO DELIVER ON TESTING AND MEDICAL SUPPLIES

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

Distributing virus tests and determining who gets tested

⊥  
**24%**

doing this well or very well

Creating a distribution system that ensures that **medical and other necessary supplies are getting to where they are needed most**

⊥  
**32%**

doing this well or very well

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

⊥  
**33%**

doing this well or very well



# PERMISSION TO RESTRICT MOVEMENT

Which do you agree with more?

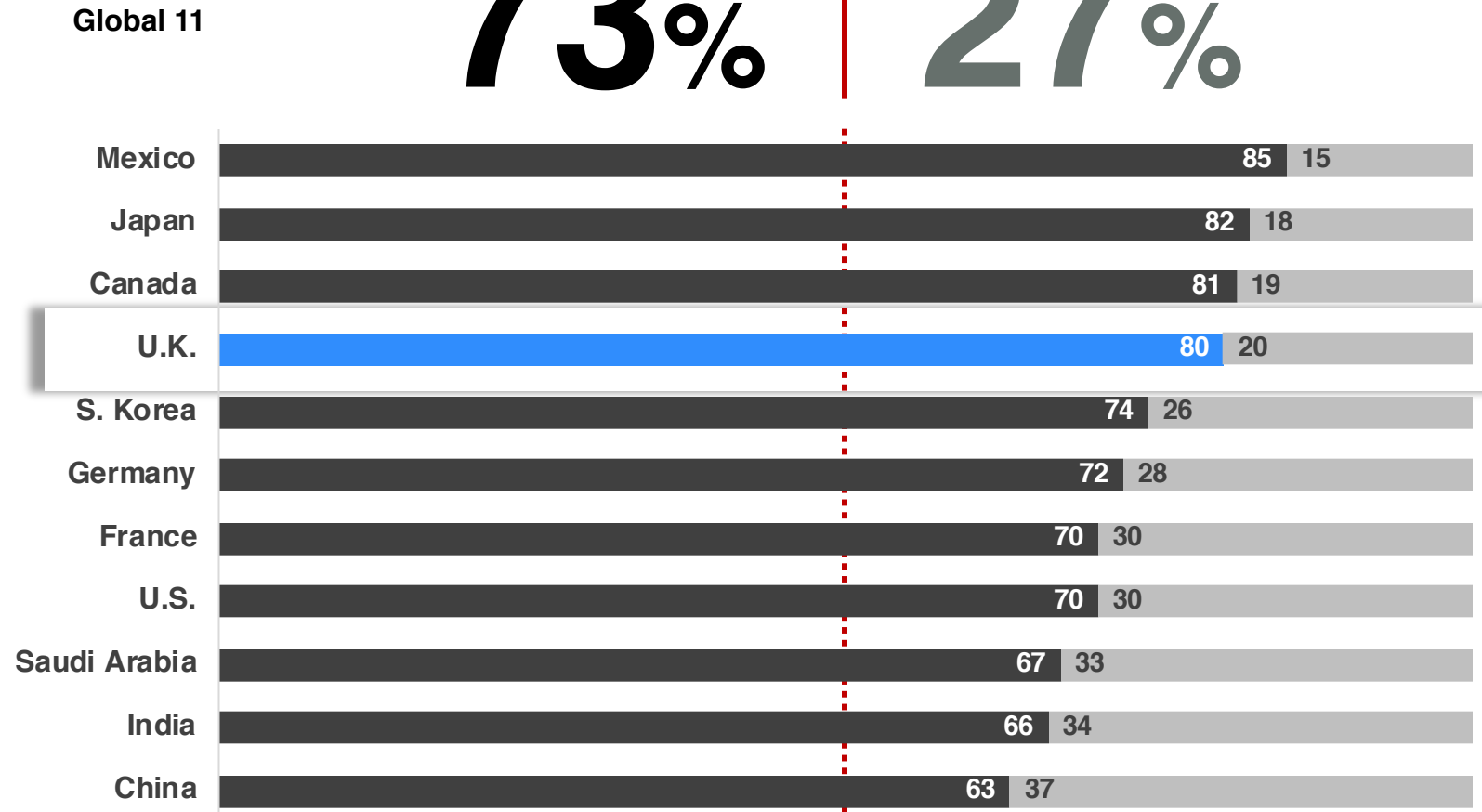
Pandemic-related restrictions on my freedom of movement are **entirely reasonable and appropriate**

OR

The government is **restricting my freedom of movement** more than it should be allowed to

73%

27%



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.

50%

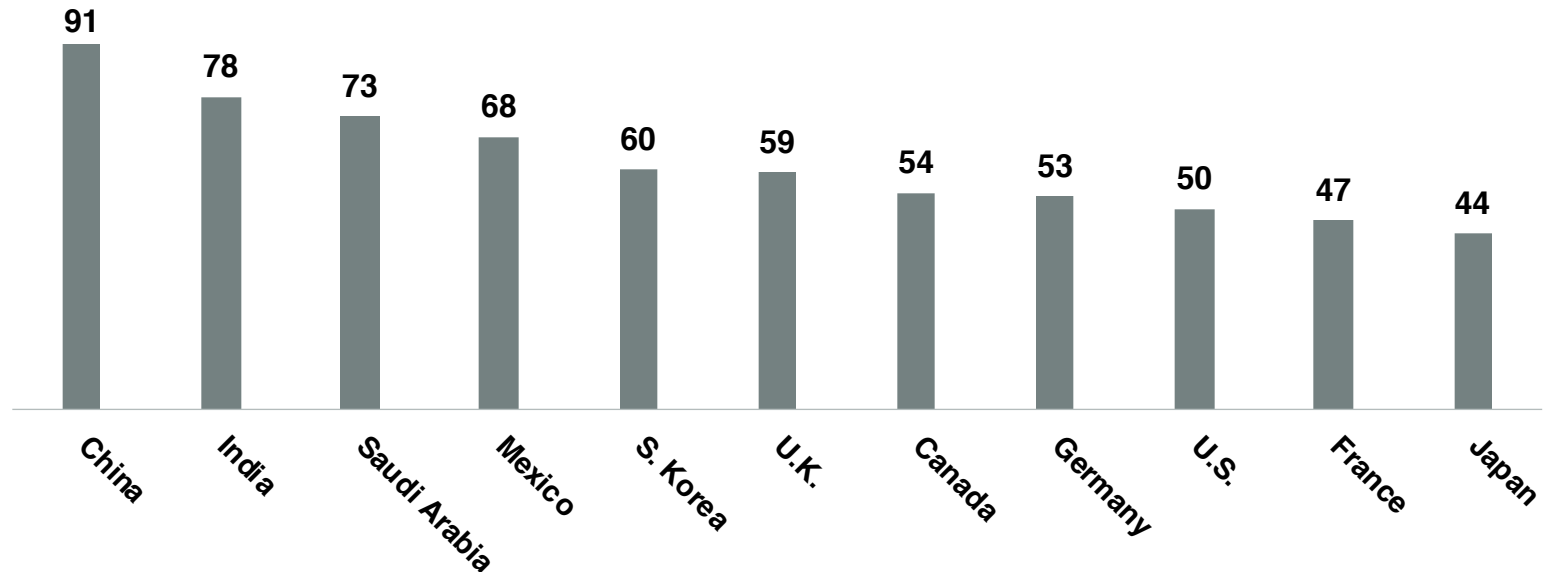
# PERMISSION TO TRACK PERSONAL DATA

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



# WORRY ABOUT THE BILL LATER

Which do you agree with more?

The government should **continue to spend money propping up the economy now**, even if it means we have to pay for it with large tax increases later

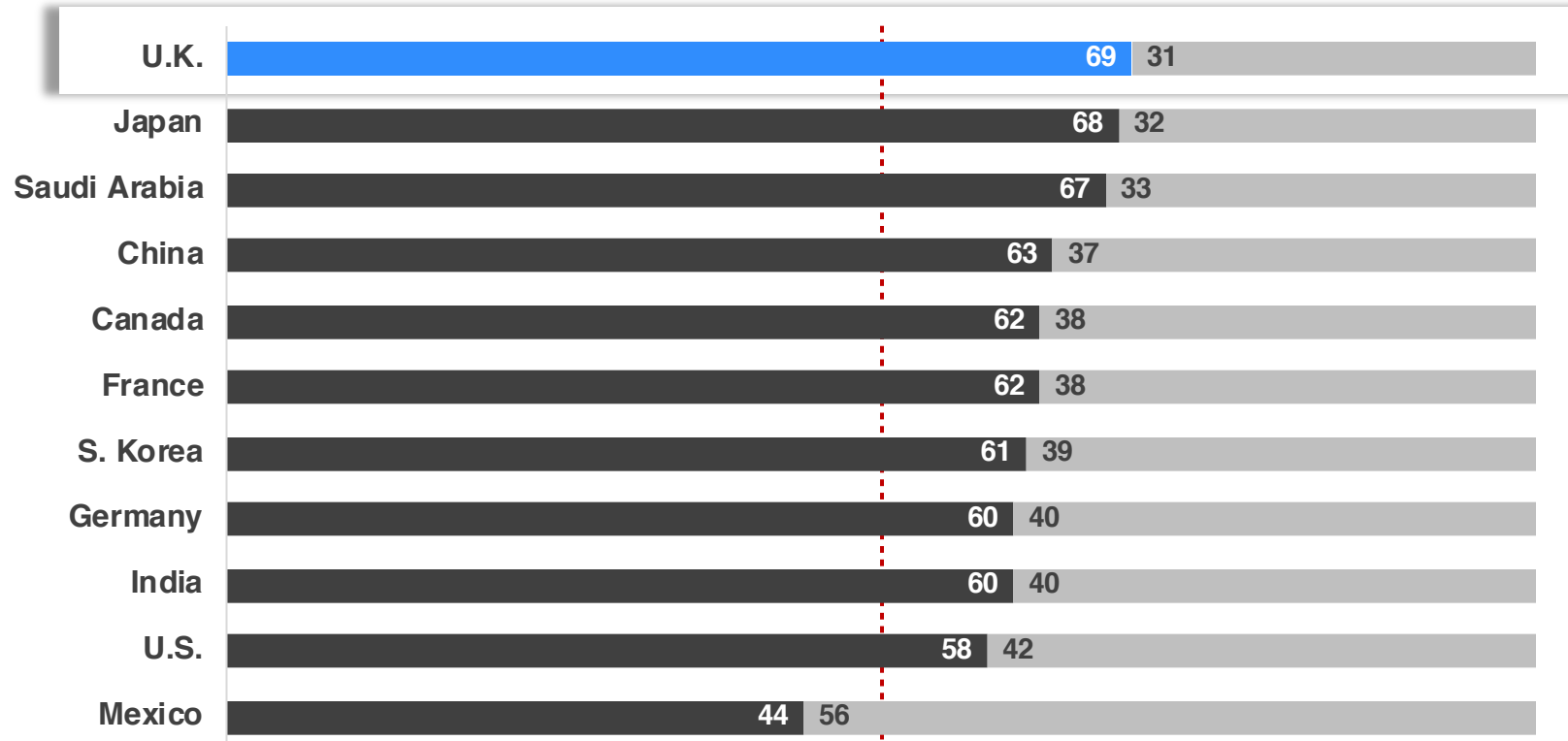
The government should **stop spending large amounts** it does not have to prop up the economy

OR

61%

39%

Global 11



50%

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.





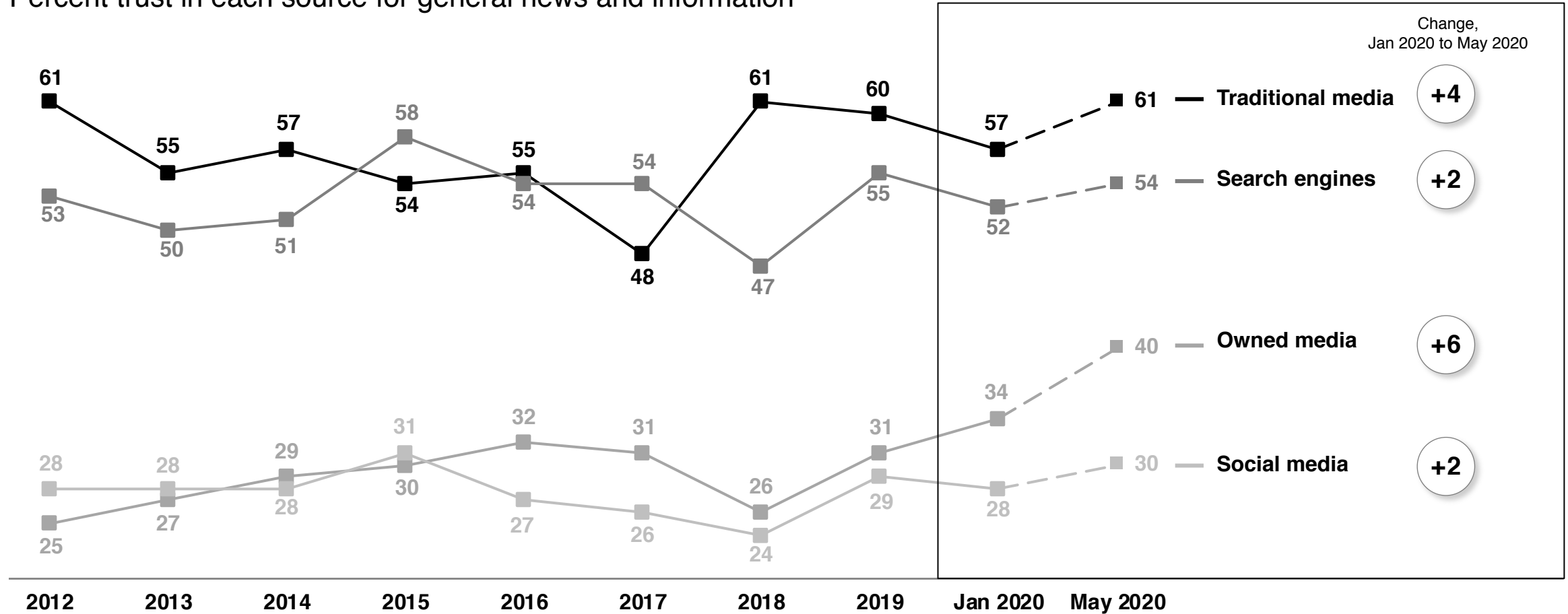
⊥

# A VITAL ROLE FOR MEDIA

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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, U.K.

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



# 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

⊥  
**38%**

doing this well or very well

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

⊥  
**31%**

doing this well or very well





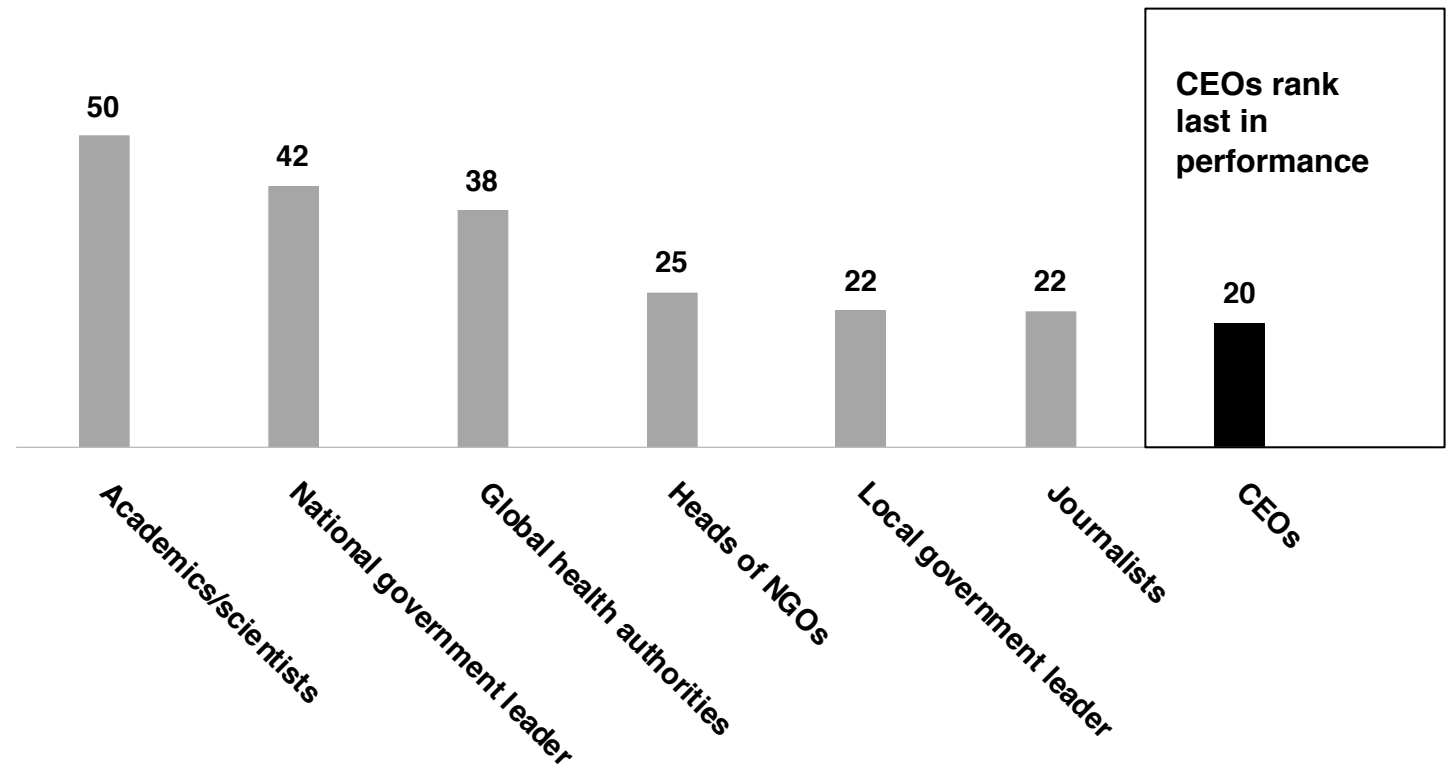
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**MOMENT OF RECKONING  
FOR BUSINESS**  
└

# 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

⊥  
**55%**

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



# 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

⊥  
**44%**

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

⊥  
**35%**

doing this well or very well

**Preparing for the eventual recovery** and figuring how to return things to normal as quickly as possible

⊥  
**28%**

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**

⊥  
**32%**

doing this well or very well

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

⊥  
**35%**

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**

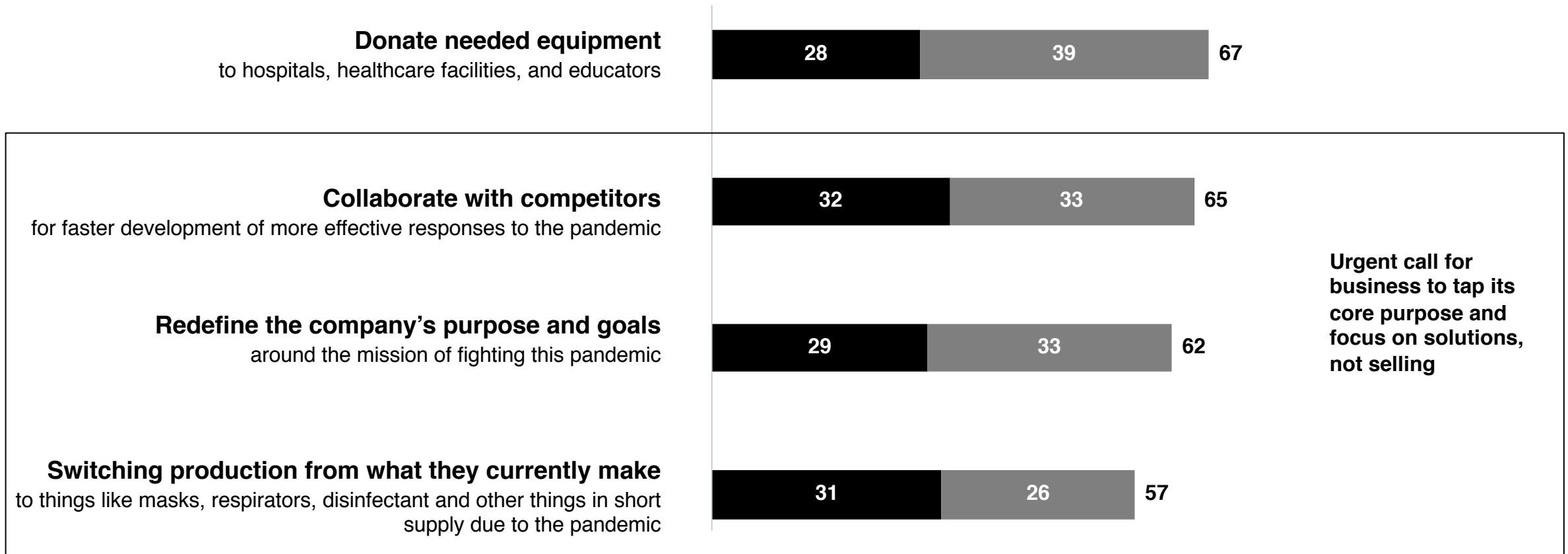
⊥  
**29%**

doing this well or very well

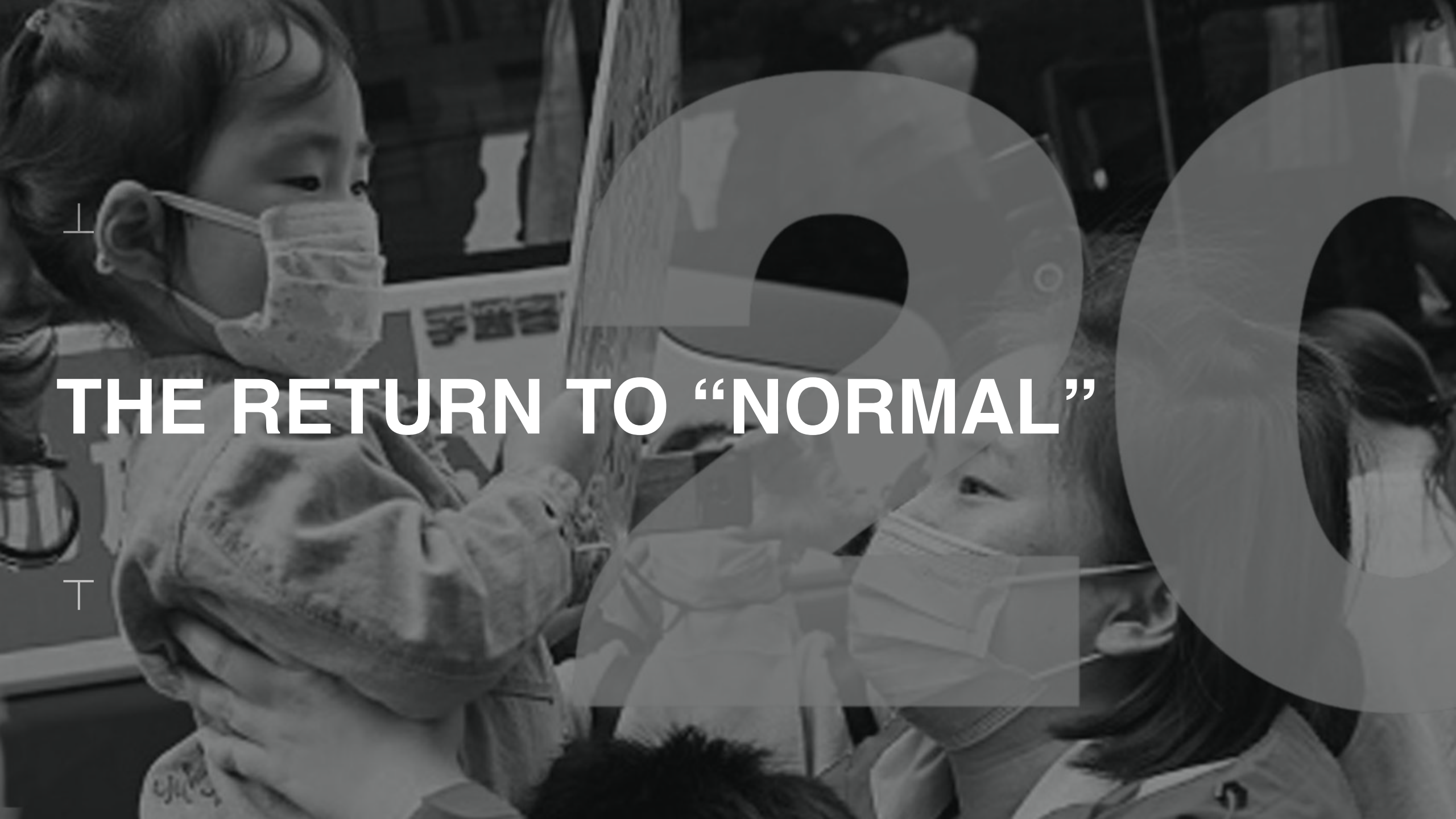
# REDEFINE MISSION AROUND FIGHTING THE PANDEMIC

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

■ Maintain ■ Increase







# THE RETURN TO "NORMAL"

# GOVERNMENT TRUSTED TO LEAD ECONOMIC RECOVERY

Percent who trust each to lead the country through economic recovery

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2020 Edelman Trust Barometer Spring Update. ECO\_LEAD. Once the virus is brought under control, the country will face a whole new set of challenges as the work of rebuilding the economy begins. Which of the leaders listed below do you trust to lead the country through that economic recovery period? Pick all that apply. General population, U.K. "All of the above" responses were added to each item.



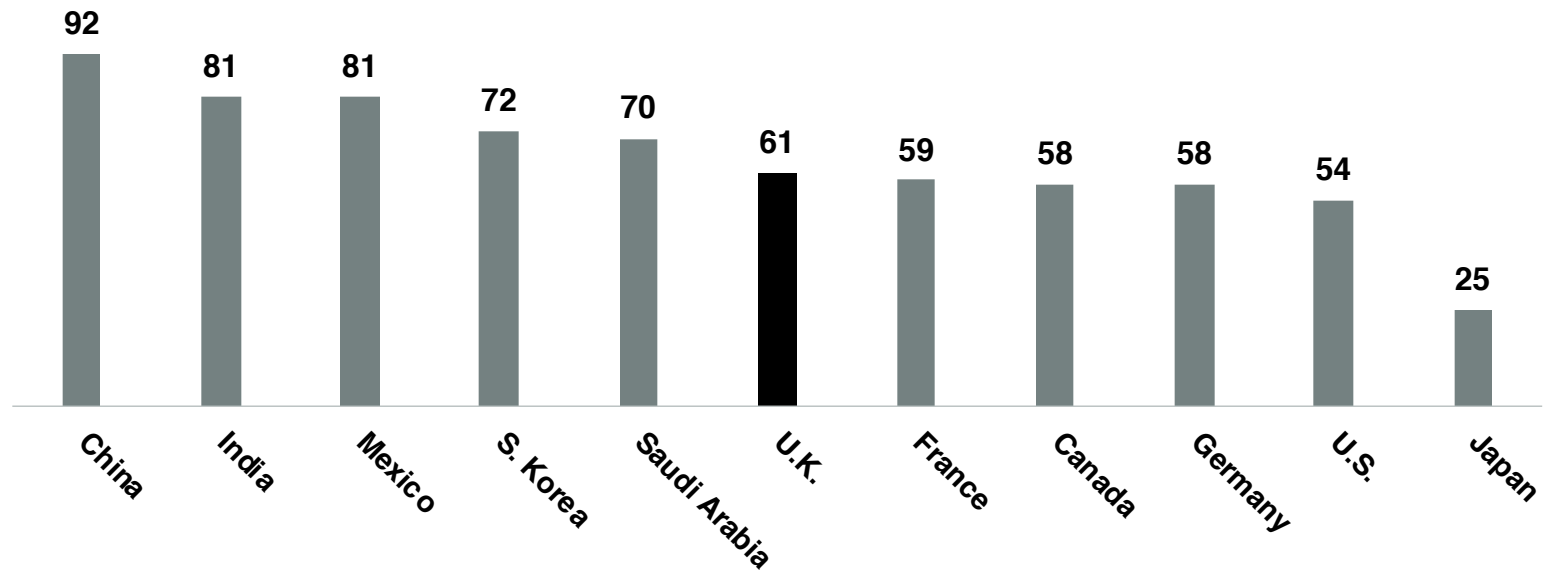
# LOOKING FOR A BIGGER SOCIAL SAFETY NET

Percent who agree

This pandemic has convinced me that the **role of government in our lives needs to grow**, and we need to develop a bigger, more encompassing social safety net to ensure people do not have to worry about good healthcare or being without a job in times like these

⊥  
**65%**

Global 11



# OPTIMISM FOR POSITIVE CHANGE IN LONG TERM

Which do you agree with more?

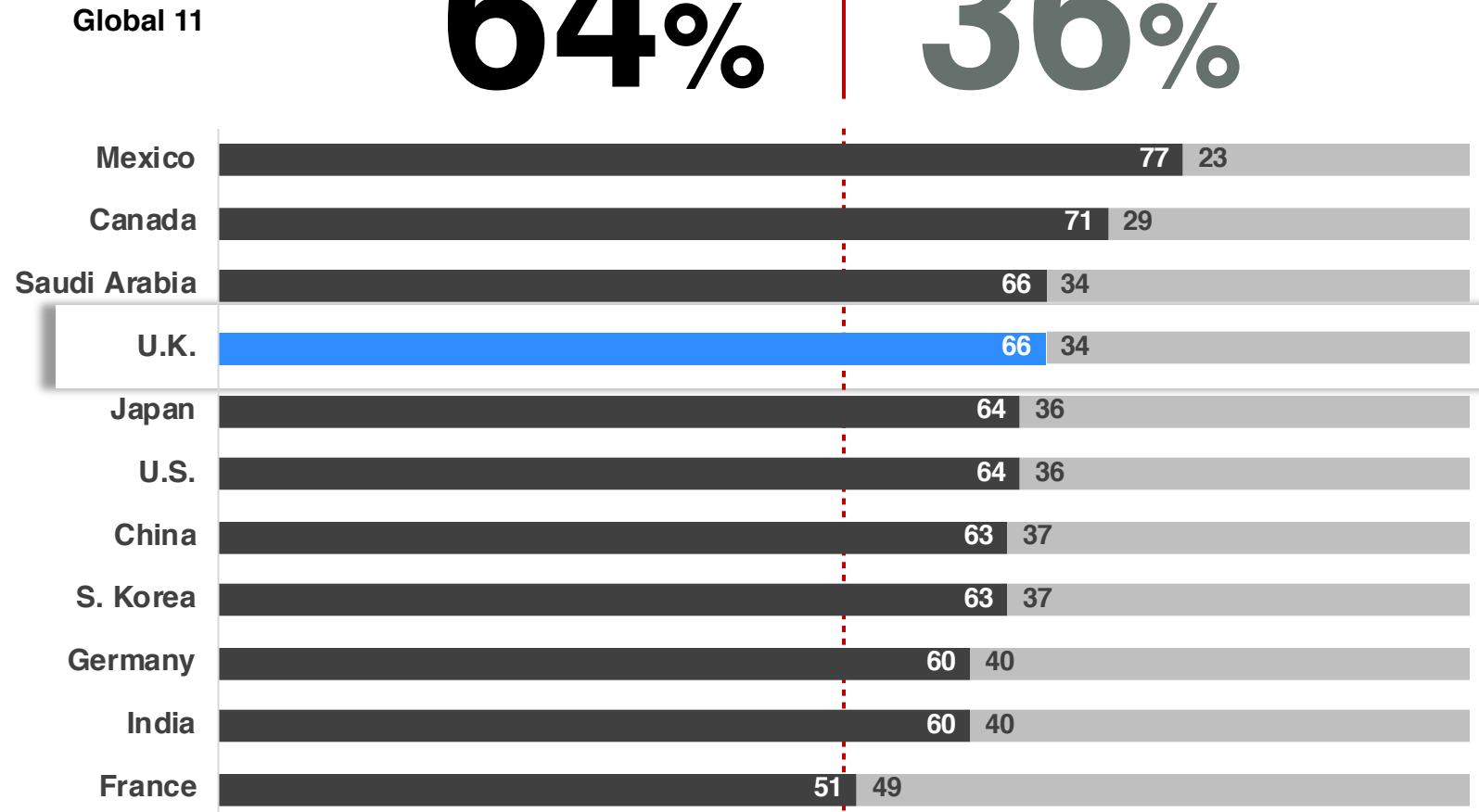
As horrible as it is, this pandemic will lead to **valuable innovations and changes for the better** in how we live, work and treat each other as people

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%



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.

50%

