

A photograph of two women from behind, holding hands and raising them towards a bright sunset in a park. The woman on the left has blonde hair and is wearing a light-colored jacket and a black backpack. The woman on the right has dark curly hair and is wearing a dark top and a black backpack. The background shows trees and a path with white chevron signs.

SPECIAL REPORT:
**BRAND
TRUST
IN 2020**

Edelman Trust
Barometer 2020



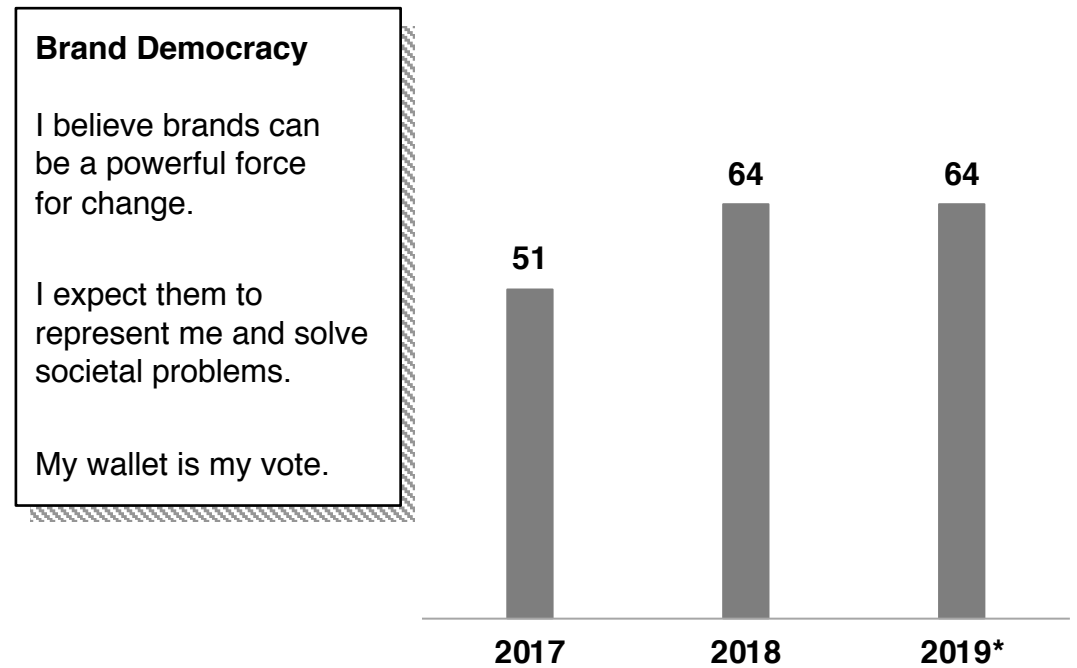
2019: BRAND TRUST RANKS AS TOP FIVE BUYING CRITERION

Percent who rate each as important in their buying decision

Product attributes	Quality	85
	Convenience	84
	Value	84
	Ingredients	82
	I must be able to trust the brand to do what is right	81
Brand and company attributes	Supply chain	79
	Customer before profits	78
	Good reviews	77
	Reputation	73
	Values	72
	Environmental impact	71

BUYING ON BELIEF BECOMES THE NEW NORMAL

Percent who choose, switch, avoid or boycott a brand based on its stand on societal issues



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. General population, 8-mkt avg.

2018 Edelman Earned Brand. Belief-driven buying segments. General population, 8-mkt avg. Belief-driven buyers choose, switch, avoid or boycott a brand based on its stand on societal issues.

*2019 Edelman Trust Barometer Special Report: In Brands We Trust? Mobile Survey. Belief-driven buying segments. General population, 8-mkt avg.

SPRING 2020: AMID PANDEMIC, SOCIETAL AND PERSONAL NEEDS CONVERGE

Percent who agree

I want brands to shift money and resources to producing products that **help people meet pandemic-related challenges**

89%

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



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

62%

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. 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. Questions shown to those who have heard of the virus (Q1/1). General population, 12-mkt avg. Data collected between March 23 and March 26, 2020.

SPRING 2020: NO DISTINCTION BETWEEN REPUTATION AND THE ROLE OF BRANDS IN ADDRESSING RACISM

Percent who agree

It is important to earning/keeping my trust that brands take the steps necessary to **ensure that their organization is racially representative** of the country as a whole

U.S.

64%

S. Africa	73
Canada	65
Germany	64
France	58
UK	57

Brands **owe it to their employees to speak out** against systemic racism and racial injustice

U.S.

52%

Canada	57
UK	56
France	50
S. Africa	46
Germany	40

2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; top 3 box, important. Q3. Why do you believe that brands and companies should publicly speak out against systemic racism and racial injustice in your country [following the death of George Floyd and other recent racially motivated attacks on Blacks]? Pick all that apply. Question asked of those that said brands should publicly speak out against racism and injustice (Q2/1). General population, Canada, France, Germany, S. Africa, UK and U.S. *Brackets in footer indicate language that was asked only in the U.S.

BRAND TRUST IN 2020

11-market online survey

Brazil, Canada, China, France, Germany, India, Japan, S. Africa, S. Korea, UK and U.S.

- All data is nationally representative based on age, region, gender and additionally in the UK and U.S. by race/ethnicity
- 22,000+ respondents (2,000+ per market)

Timing of Fieldwork: May 27 - June 5, 2020

Report includes findings from two additional 2020 Trust Barometer Special Reports:

Brand Trust and the Coronavirus Pandemic

12-market online survey

- Brazil, Canada, China, France, Germany, India, Italy, Japan, S. Africa, S. Korea, UK, and U.S.
- 12,000 respondents (1,000 per market)
- Timing of Fieldwork: March 23 - 26, 2020

Brands and Racial Justice

- Online survey of 2,000+ U.S. respondents, fielded June 5 - 7, 2020
- 5-market online survey of 7,000+ total respondents (2,000+ each in Canada and UK; 1,000+ each in France, Germany and S. Africa), fielded June 12 - 18, 2020

Margin of error based on unweighted sample sizes

- 11-market average data +/- 0.7% (n=22,000+)
- Market-specific data +/- 2.1% to 2.2% (n=2,000+)



**AMID
SEISMIC
SHOCKS,
TRUST
NOW MAKE
OR BREAK**

TRUST SECOND ONLY TO PRICE FOR PURCHASE AND LOYALTY

Percent who say they focus most on each brand attribute

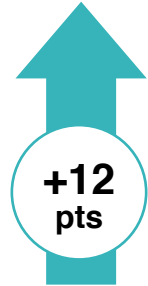
Brand attributes that are most top of mind when deciding whether to...	buy a new brand	become a loyal customer
Its price and affordability	64	63
Whether you trust the company that owns the brand <i>or</i> brand that makes the product	53	49
The reputation of the brand	48	42
Whether you trust the product to perform well and do everything you need it to do	43	45
How well they it treats its customers	41	42
How easy it is to find and buy the brand	38	39
How well it treats the environment	37	37
If they get the ingredients and materials they use locally, sustainably and ethically	31	29
How well it treats its employees	27	29
How the brand has responded in the face of the COVID-19 pandemic	25	24

MORE PEOPLE CHOOSING BRANDS ON TRUST

Percent who trust most of the brands they buy or use

Change, 2019 to 2020

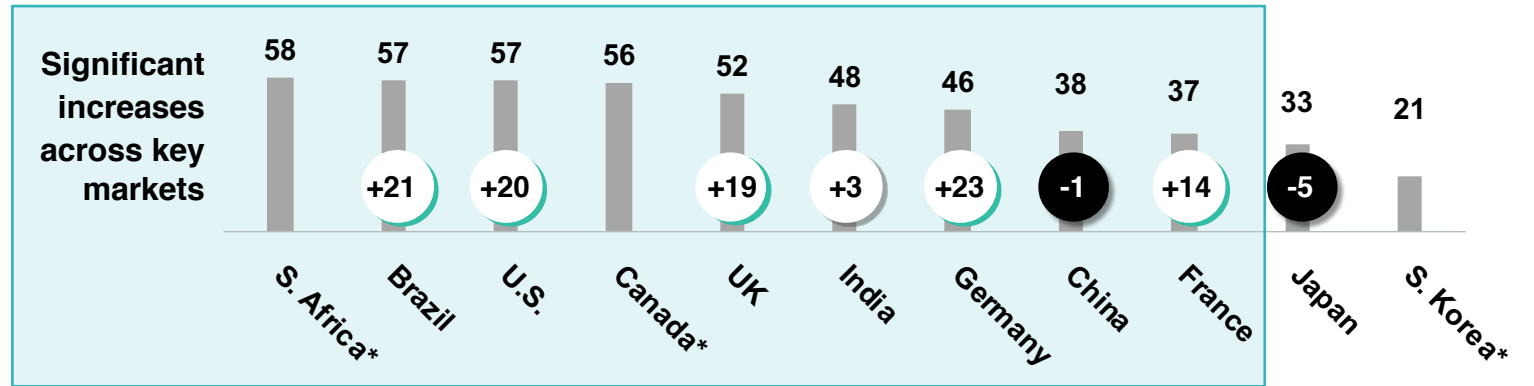
46%



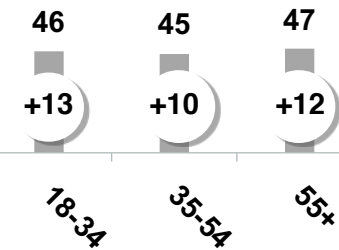
Change,
2019 to 2020

trust most of the
brands they buy or use

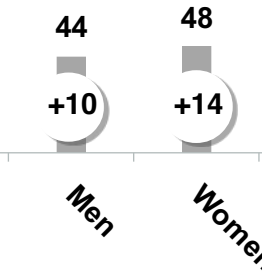
MARKETS



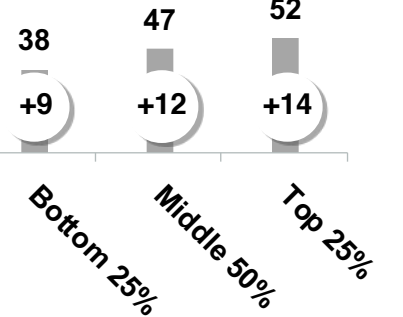
AGE



GENDER



INCOME



2020 Edelman Trust Barometer Special Report: Brand Trust. Q99. Approximately what proportion of the brands that you regularly buy or use would you say that you trust? Net of codes 5-7. General population, 8-mkt avg, and by age, gender, and income. *Tracking data not available for Canada, S. Africa, and S. Korea; markets not included in 8-mkt avg.

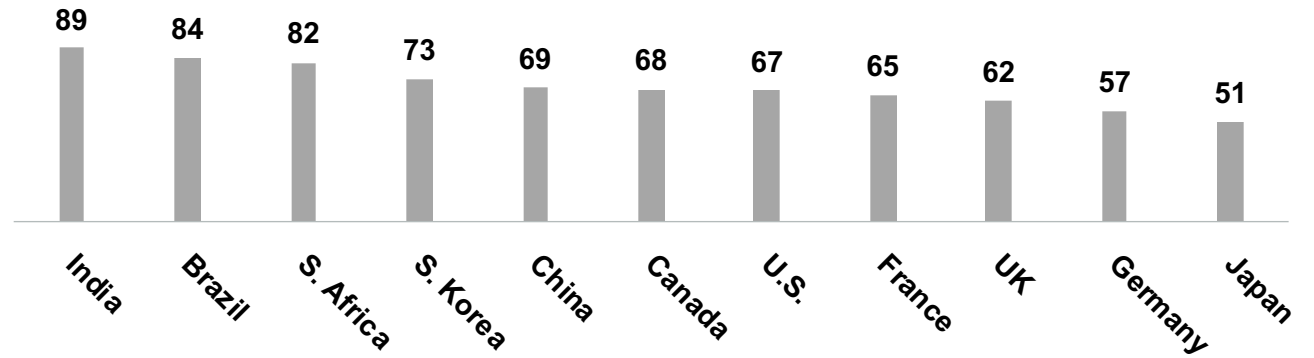
A BIGGER NEED FOR BRAND TRUST TODAY THAN IN PAST

Percent who say being able to trust a brand today is more important than in the past

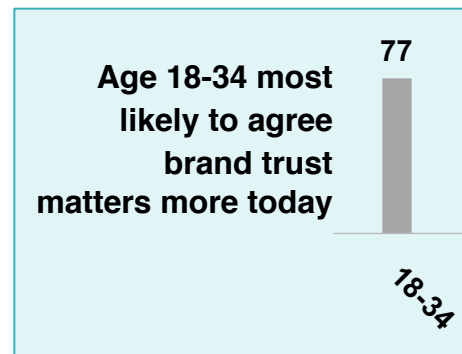
70%

say trusting a brand is *more* important today than in the past

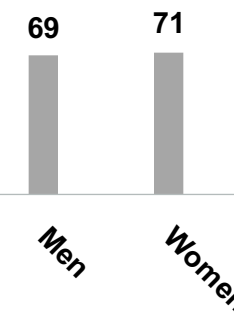
MARKETS



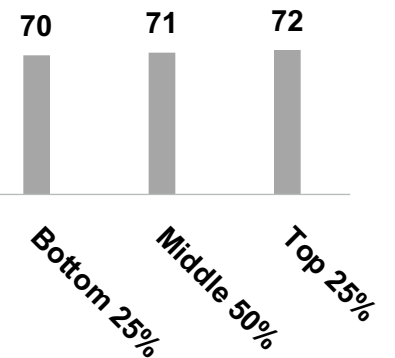
AGE



GENDER



INCOME



A BIGGER NEED FOR TRUST— FOR BOTH PERSONAL AND SOCIETAL REASONS

Percent who say each is a reason why brand trust has become more important

My Personal Vulnerability

The pandemic has increased my reliance on brands to keep me and my community safe	35
The pandemic has increased my reliance on brands to help me get through day-to-day challenges	33
Brands are collecting more of my personal information	28
I rely more on brands to do important things for me	26
I am struggling financially and can't afford to waste money	26
I use brands to express my values and don't want them to reflect badly on me	22

81% net

Brands' Societal Impact

How brands produce and deliver products has a large impact on the environment	44
Brands will have a huge impact on how quickly and safely the economy recovers	36
Brands are more involved in major social issues and societal problems	34
Technological innovations such as robotics and AI have the potential to cause great harm if misused	26

74% net

2020 Edelman Trust Barometer Special Report: Brand Trust. IMP_WHY. You just indicated that it is more important to you to be able to trust the brands you buy today than in the past. Among the items listed below, please select those, if any, that best describe why it has become more important to you to be able to trust brands. Pick all that apply. Question asked of those that said it is more important to trust the brands they use today than in the past (IMP_TRU/1). General population, 11-mkt avg. "Personal Vulnerability" is a net of attributes 2-5, 8, and 9; "Societal Impact" is a net of attributes 1, 6, 7, and 10.

PEOPLE BUYING OR BOYCOTTING BRANDS OVER THEIR RESPONSE TO THE PANDEMIC

Percent who agree, and change from April to June 2020

● — 0 — ⊕ Change, Apr 2020 to Jun 2020

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

44%



Change, Apr 2020 to Jun 2020

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

40%



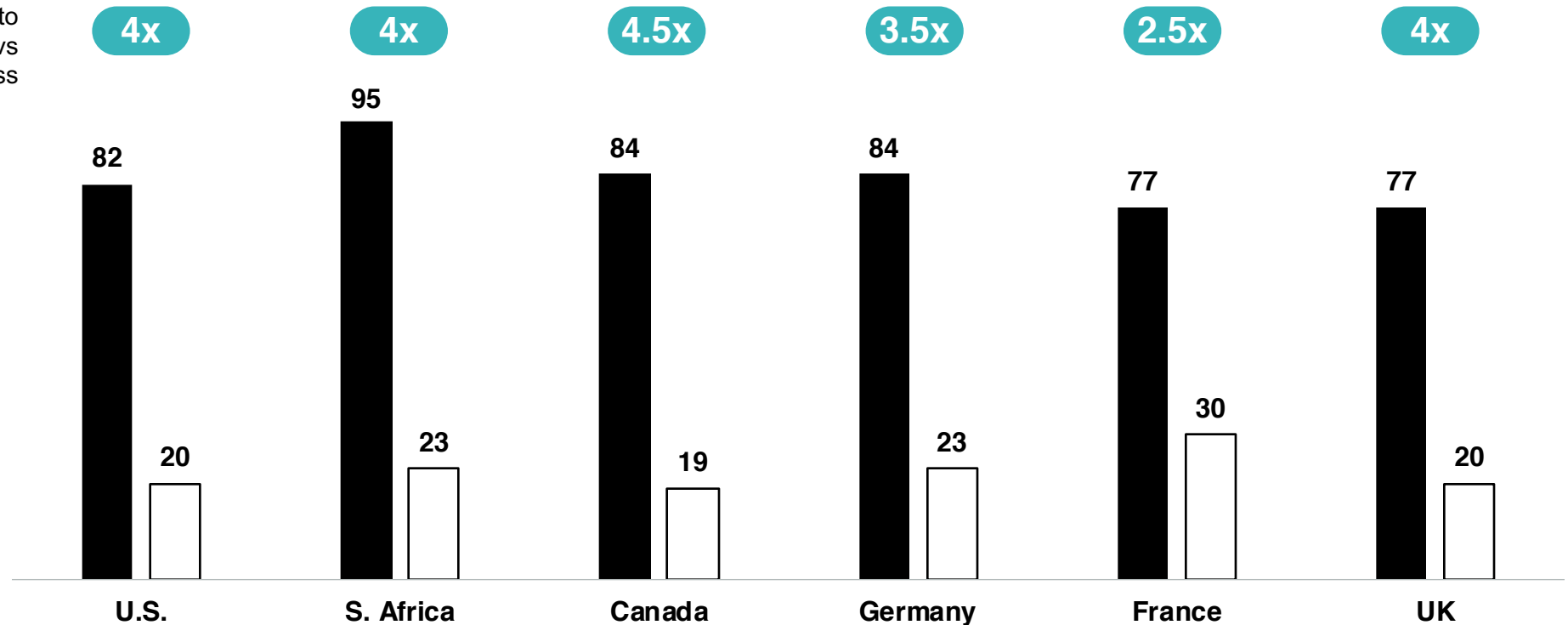
Change, Apr 2020 to Jun 2020

BRANDS FAR MORE LIKELY TO GAIN TRUST THAN LOSE IT WHEN THEY TAKE ACTION


Percent who say brand actions in response to racial injustice would result in trust gain or loss

■ Brands would earn/keep my trust □ Brands would lose my trust

Difference, opportunity to gain trust vs risk of trust loss



2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; top 3 box, important; code 1, doing this would lose my trust. General population, Canada, France, Germany, S. Africa, UK, and U.S. Data shown is a net of attributes 2-9. *Brackets in footer indicate language that was asked only in the U.S.

A photograph of a man and a young child working together to cut an orange. The man, wearing glasses and a dark shirt, is holding a knife and cutting the orange. The child, wearing a white t-shirt, is looking down at the orange. The background is a blurred outdoor setting with trees. The image is overlaid with a blue and green geometric design on the left side.

**TIME TO ACT:
SOLVE PROBLEMS
AND ADVOCATE
FOR CHANGE**

SOLVING PROBLEMS BIG AND SMALL MATTERS MOST FOR BRANDS TODAY

Percent who rate each as very or extremely important for brands to earn or keep their trust

Solve my problems

Be a dependable provider	69
Be a reliable source of information	64
Be a protector	63
Be an innovator	63
Be an educator	55
Be a calming voice	52
Be a connector	51

Solve society's problems

Be a visionary	61
Be a problem solver	60
Be a positive force in shaping our culture	58
Be a safety net	57
Be a collaborator	54

Enrich my life

Be a source of joy	58
Be a personal inspiration	53
Be a means of self-expression	48
Be a source of entertainment/distraction	46

85% net

80% net

73% net

2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND_KEEP. In general, how important is it to earning or keeping your trust that brands do each of the following? 5-point scale; top 2 box, important. General population, 11-mkt avg. "Solve my problems" is a net of attributes 1-6 and 9; "Solve society's problems" is a net of attributes 12-16; "Enrich my life" is a net of attributes 7,8,10,11. Please see the Technical Appendix for full text for each role.

BRAND ACTION OVER SELF EXPRESSION

Percent who say each purchasing consideration has become more or less important as a direct result of the pandemic

More important	More	Less
	If the brand makes me feel safe using it	36
Whether or not the product is made in this country	33	15
How much the product costs	32	14
How well the brand treats its employees	31	13
Whether or not the brand is environmentally friendly and sustainably made	30	14

Less important	More	Less
	Whether the brand communicates that I am successful	12
Whether the brand communicates that I am a taste maker or trend setter	12	27
Whether I associate the brand with excitement and adventure	13	25

IN THE FACE OF THE COVID PANDEMIC, PEOPLE WANT BRANDS TO PROTECT EMPLOYEES AND PARTNER WITH GOVERNMENT

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

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%

52

38

Partner with government and relief agencies to address the crisis

90%

50

40

WANT BRANDS TO EDUCATE, INFLUENCE AND ADVOCATE FOR CHANGE

2020 Edelman Trust Barometer Special Report: Brand Trust in 2020

Percent who rate each as very or extremely important for brands to earn or keep their trust

Being a positive force in **shaping our culture**, influencing acceptable behaviors and attitudes, and elevating those who are inspirational to others

Global 11

58%

2020 Edelman Trust Barometer Special Report: Brands and Racial Justice

Percent who say each brand response to racial injustice is important to earning or keeping their trust

U.S.
58%

Educate the public and **advocate** for racial equality

S. Africa	73
Germany	63
Canada	58
France	51
UK	50

U.S.
60%

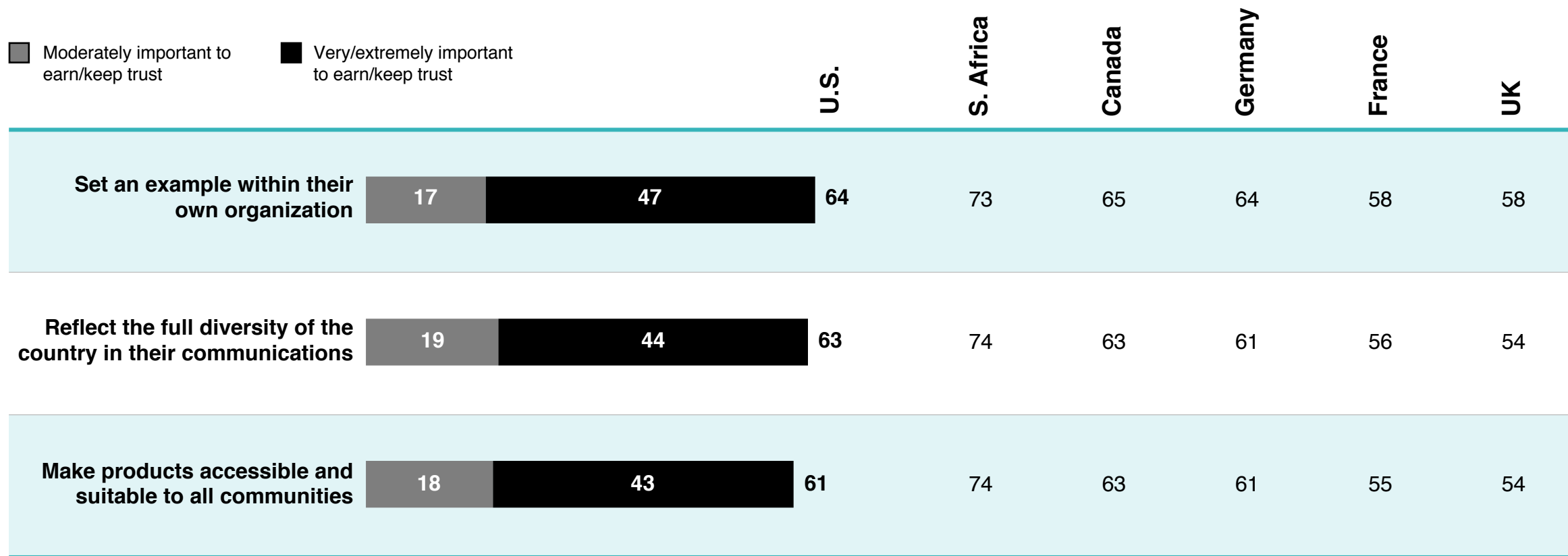
Invest in **addressing the root causes** of racial inequality

S. Africa	74
Germany	63
Canada	60
France	56
UK	51

2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND_KEEP. In general, how important is it to earning or keeping your trust that brands do each of the following? 5-point scale; top 2 box, important. General population, 11-mkt avg. 2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; code 4, moderately important; codes 5 and 6, very/extremely important. General population, Canada, France, Germany, S. Africa, UK, and U.S. "Educate the public and advocate for racial equality" is an average of Q4/3 and 4. *Brackets in footer indicate language that was asked only in the U.S.

IN THE FACE OF SYSTEMIC RACISM, BRANDS MUST ACT TO GET THEIR OWN HOUSE IN ORDER

Percent who say each brand response to racial injustice is important to earning or keeping their trust



2020 Edelman Trust Barometer Special Report: Brands and Racial Justice. Q4. In general, how important is it to earning or keeping your trust that brands or companies do each of the following in response to systemic racism and racial injustice [following the death of George Floyd and other recent racially motivated attacks on Blacks]? 6-point scale; code 4, moderately important; codes 5 and 6, very/extremely important. General population, Canada, France, Germany, S. Africa, UK, and U.S. *Brackets in footer indicate language that was asked only in the U.S.

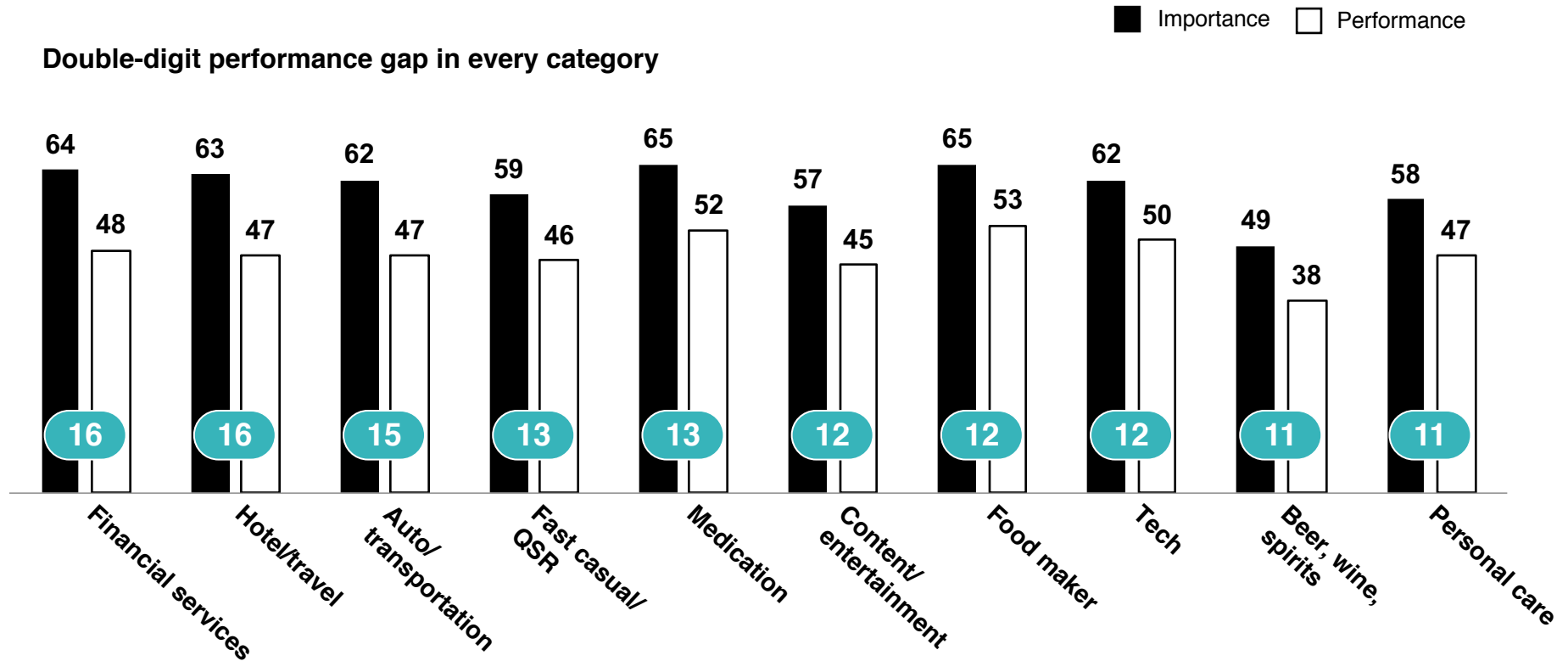
IN THE FACE OF THE CURRENT CRISES, PEOPLE WANT BRANDS TO *PROTECT MORE*

Percent who rate this as very or extremely important for brands to earn or keep their trust; who say that brands are currently performing well on this; and the gap

Be a protector doing everything it can to **ensure the safety and wellbeing** of their employees, customers and communities

Gap, importance minus performance

Double-digit performance gap in every category



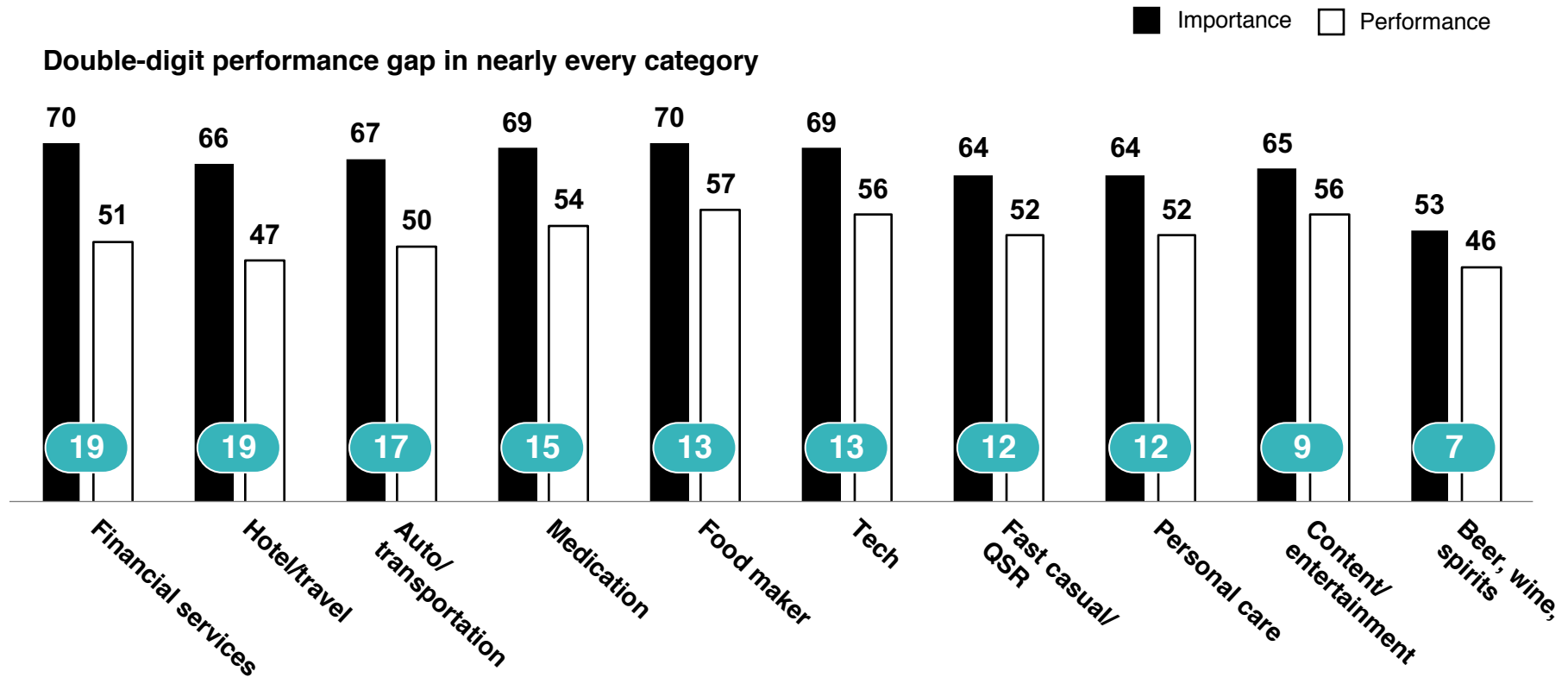
2020 Edelman Trust Barometer Special Report: Brand Trust. SEC_KEEP. In general, how important is it to earning or keeping your trust that a(n) [insert sector] brand does each of the following? 5-point scale; top 2 box, important. Each sector asked of one-fifth of the sample. SEC_PER. In the face of this COVID-19 pandemic and its economic consequences, how well do you feel [insert sector] brands are doing each of the following? For each item below, select the statement that best describes your perceptions of how brands are performing in fulfilling this role. 5-point scale; top 2 box, doing well. Each sector asked of one-fifth of the sample. General population, 11-mkt avg, by sector.

IN THE FACE OF THE CURRENT CRISES, PEOPLE WANT BRANDS TO *BE MORE ACCESSIBLE*

Percent who rate this as very or extremely important for brands to earn or keep their trust; who say that brands are currently performing well on this; and the gap

Be a dependable provider ensuring that people have **easy and affordable access** to the products and services they need

Gap, importance minus performance



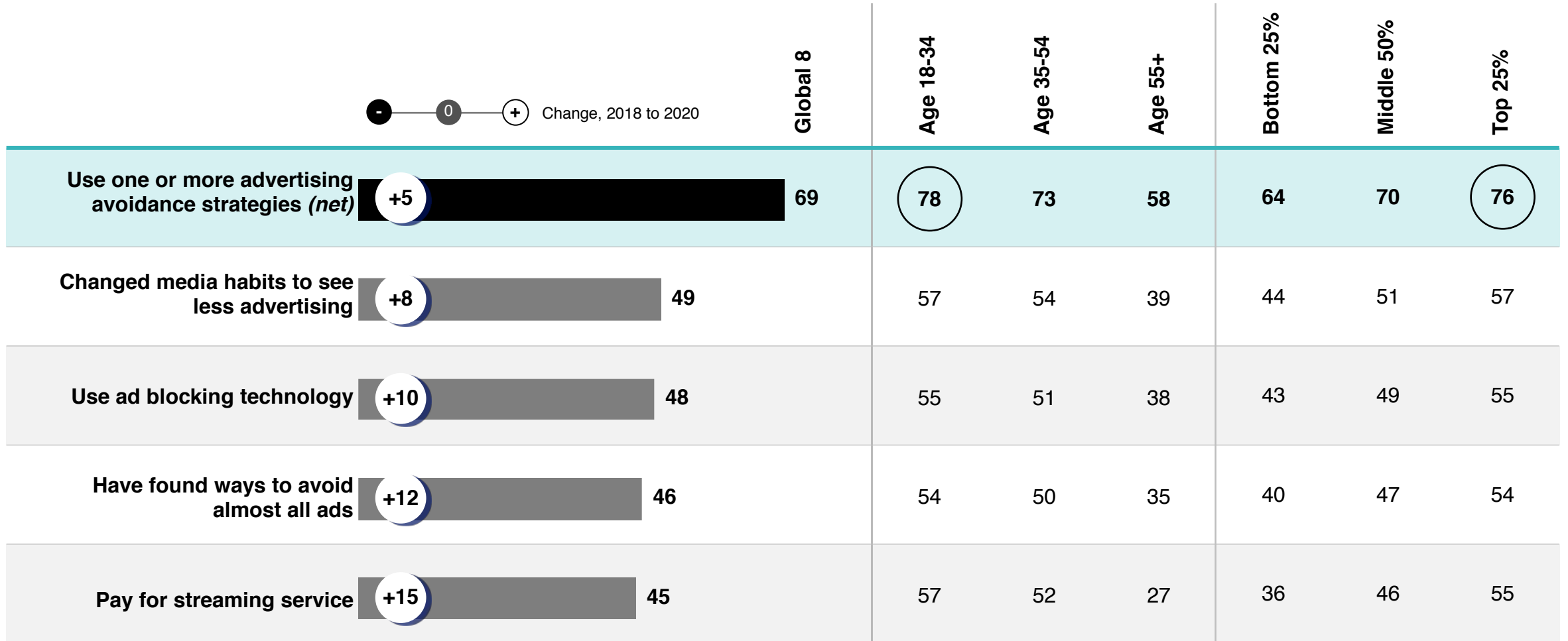
2020 Edelman Trust Barometer Special Report: Brand Trust. SEC_KEEP. In general, how important is it to earning or keeping your trust that a(n) [insert sector] brand does each of the following? 5-point scale; top 2 box, important. Each sector asked of one-fifth of the sample. SEC_PER. In the face of this COVID-19 pandemic and its economic consequences, how well do you feel [insert sector] brands are doing each of the following? For each item below, select the statement that best describes your perceptions of how brands are performing in fulfilling this role. 5-point scale; top 2 box, doing well. Each sector asked of one-fifth of the sample. General population, 11-mkt avg, by sector.



**BRAND
TRUST IS
EARNED,
NOT
BOUGHT**

NEARLY 7 IN 10 AVOIDING ADVERTISING

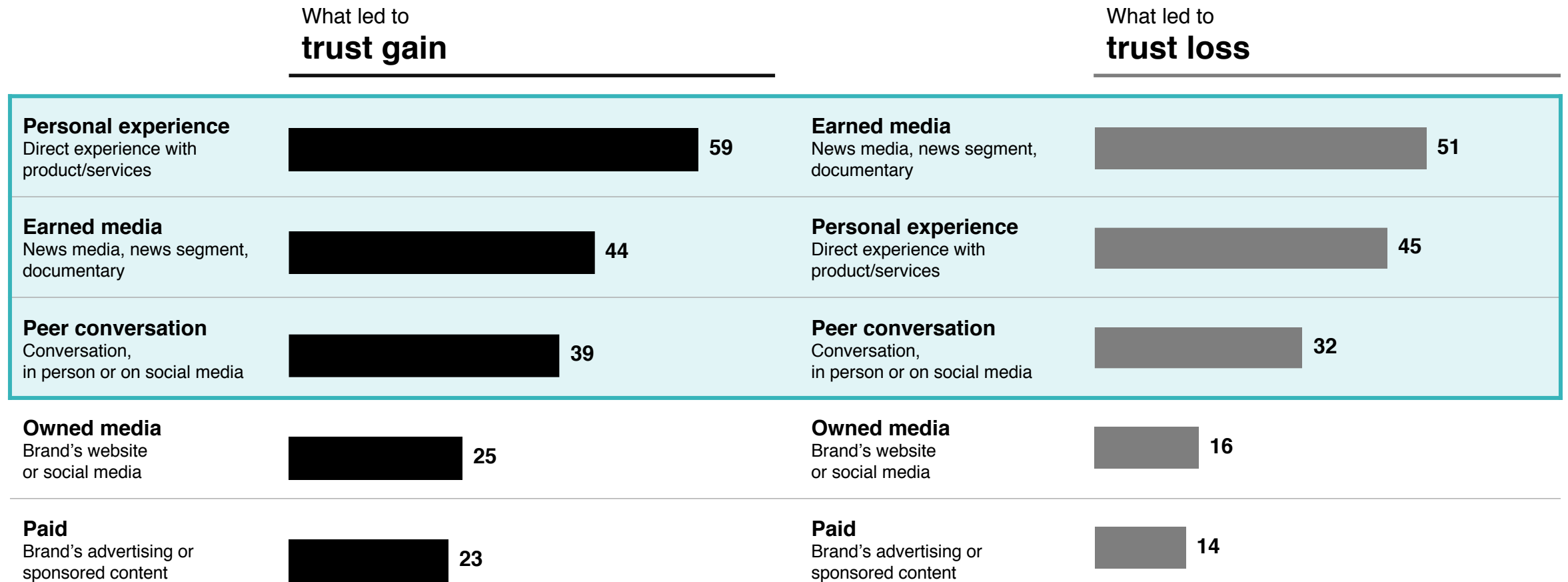
Percent who agree



2020 Edelman Trust Barometer Special Report: Brand Trust. Q70. Please indicate how much you agree or disagree with the following statements. 9-point scale; top 4 box, agree. General population, 8-mkt avg, and by age and income. Advertising avoidance is a net of codes 9, 10, 11, and 12.

EARNED IS THE BATTLEGROUND FOR TRUST

Percent who say each led to a gain or loss of trust in a brand

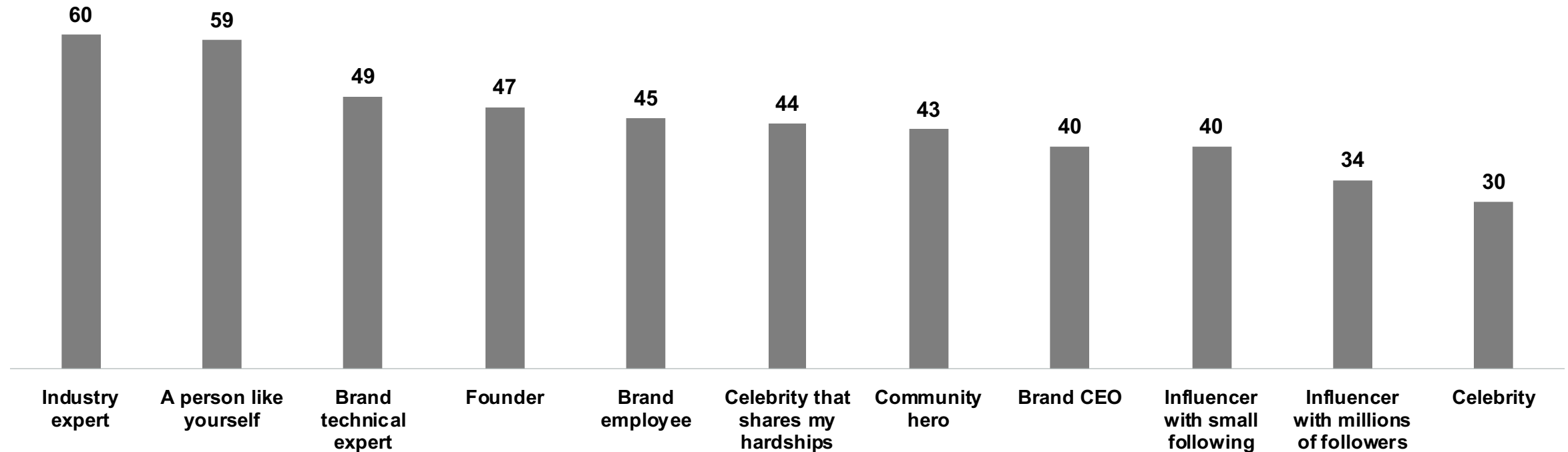


2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_GND_SRC. What led you to gain trust in this particular brand? Pick all that apply. Question asked among those that gained trust in a specific brand within the past year (TRU_GND/1). TRU_LOST_SRC. What led you to lose trust in this particular brand? Pick all that apply. Question asked among those that lost trust in a specific brand within the past year (TRU_LOST/1). General population, 11-mkt avg. "Earned media" is net of attributes 1-3; "Peer conversation" is a net of attributes 7 and 10 for both questions.

INFLUENCE BUILT THROUGH AUTHORITY AND EMPATHY

Percent who say each is a credible spokesperson for brand trust

Credible voices have a personal connection to the topic or issue



WANT BRANDS TO TALK ABOUT SOLUTIONS

Which best describes what you believe or how you feel?

2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND_CHOICE. You are about to see a series of two choices. For each pair, we want you to select the one that best describes what you believe or how you feel. General population, 11-mkt avg.

I respect and appreciate it when the brands I use spend money to **keep me informed about all they are doing to help others during the pandemic**

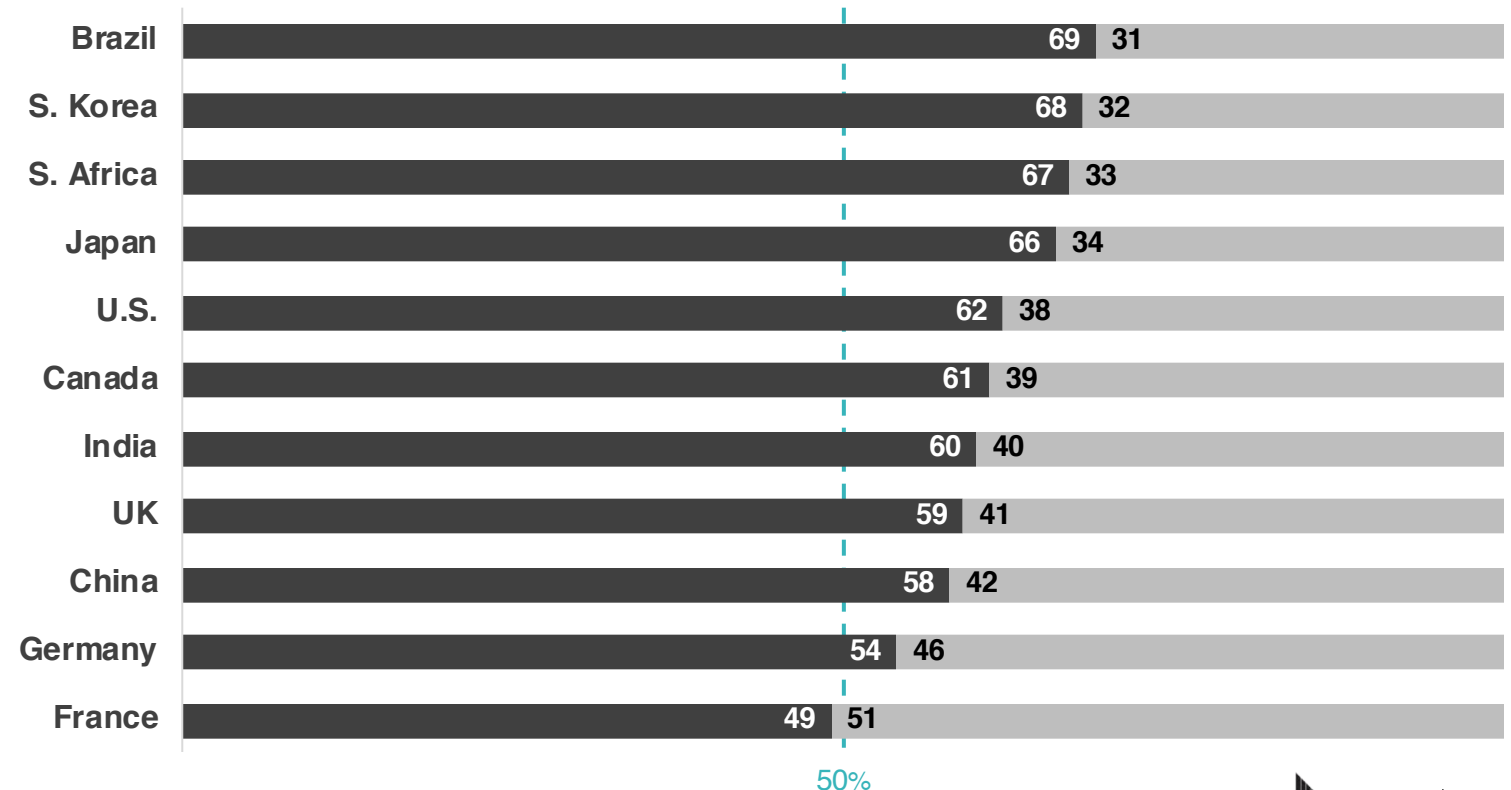
OR

I find it off-putting when the brands I use spend money on advertising that talks about all the things they have done to help people during the pandemic

61%

39%

Global 11



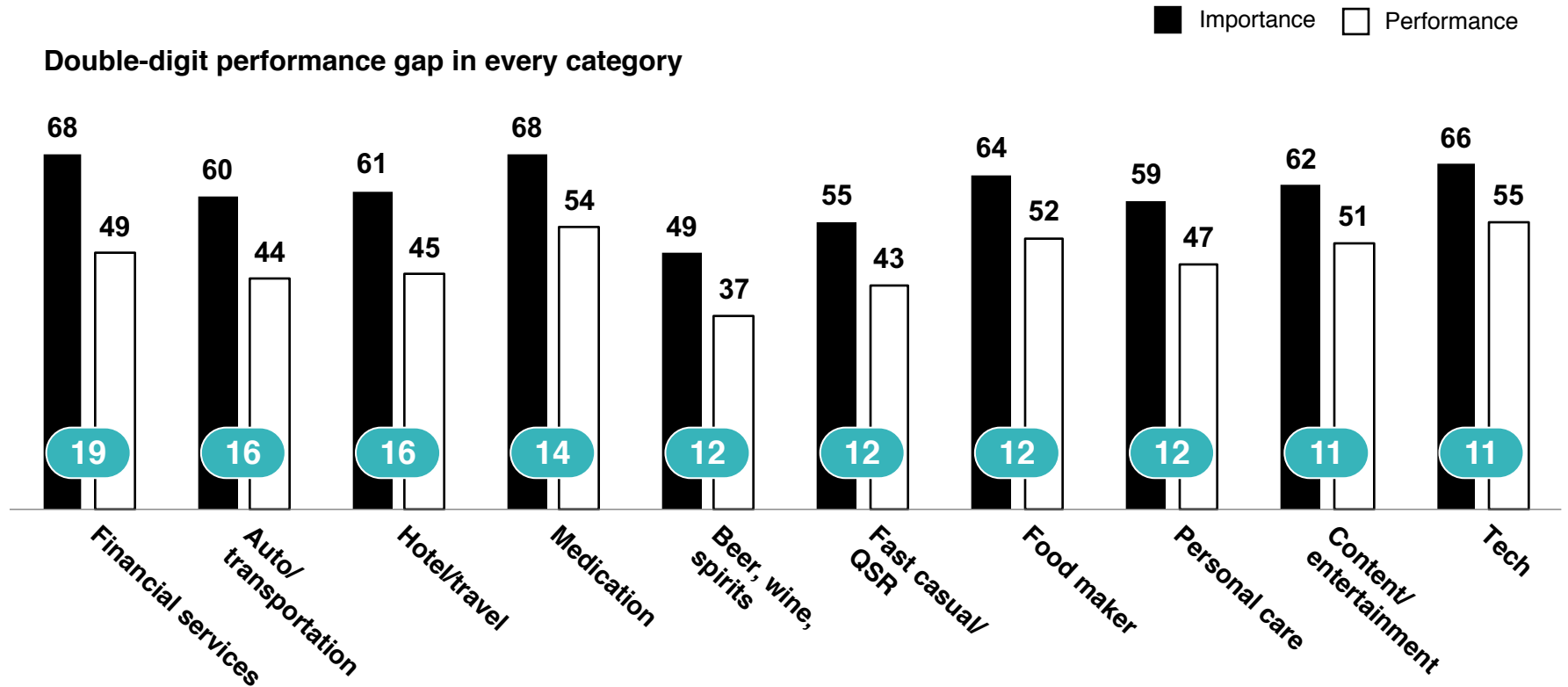
50%

IN THE FACE OF THE CURRENT CRISES, PEOPLE WANT BRANDS TO *DO MORE TO INFORM*

Percent who rate this as very or extremely important for brands to earn or keep their trust; who say that brands are currently performing well on this; and the gap

Be a reliable source of information, **keeping people informed** about what they need to know to protect themselves and make good life decisions

Gap, importance minus performance



2020 Edelman Trust Barometer Special Report: Brand Trust. SEC_KEEP. In general, how important is it to earning or keeping your trust that a(n) [insert sector] brand does each of the following? 5-point scale; top 2 box, important. Each sector asked of one-fifth of the sample. SEC_PER. In the face of this COVID-19 pandemic and its economic consequences, how well do you feel [insert sector] brands are doing each of the following? For each item below, select the statement that best describes your perceptions of how brands are performing in fulfilling this role. 5-point scale; top 2 box, doing well. Each sector asked of one-fifth of the sample. General population, 11-mkt avg, by sector.

IN THE FACE OF SYSTEMIC RACISM, BRANDS MUST BACK UP WORDS WITH ACTIONS

Percent who agree

Brands and companies that issue a statement in support of racial equality **need to follow it up with concrete action to avoid being seen by me as exploitative** or as opportunists

U.S.
+ **63%**

S. Africa	65
Canada	63
UK	57
France	54
Germany	53

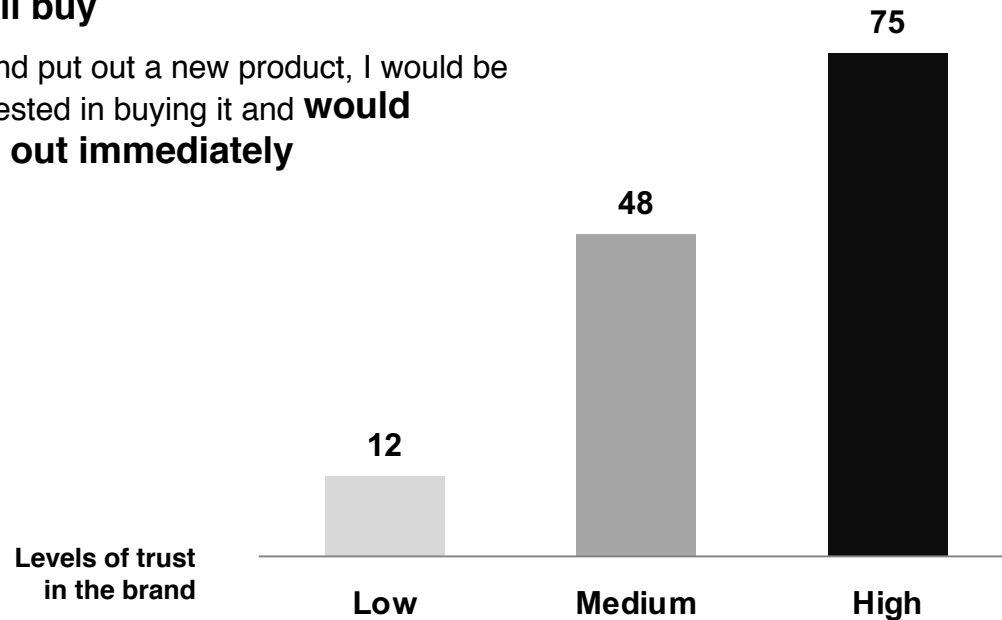
TRUST DEFINES BRANDS



MORE TRUST, MORE LOYALTY

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

- I will buy this brand **even if it is not the cheapest**
- This is **the only brand of this product that I will buy**
- If this brand put out a new product, I would be very interested in buying it and **would check it out immediately**



HP – Be Online

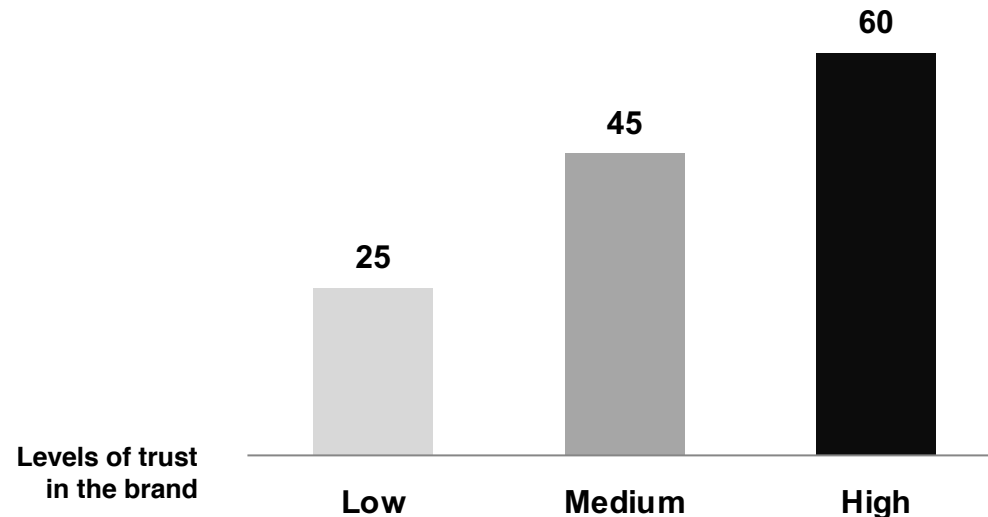


2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. “Loyalty” is a net of attributes 1-3. General population, 11-mkt avg, by low trusters, medium trusters, and high trusters at TRU_BRAND. Please indicate how much you trust this brand using a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; bottom 3 box, low trust; codes 4-6, medium trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND_OE). Data shown is in aggregate across all four scenarios.

MORE TRUST, MORE ENGAGEMENT

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

- I am comfortable **sharing my personal information** with this brand
- I **pay attention to this brand's advertising** and other marketing communications



Ajinomoto – Take Out Hate

THE TAKEOUT

The #TakeOutHate campaign wants you to order Asian takeout and share your meal online



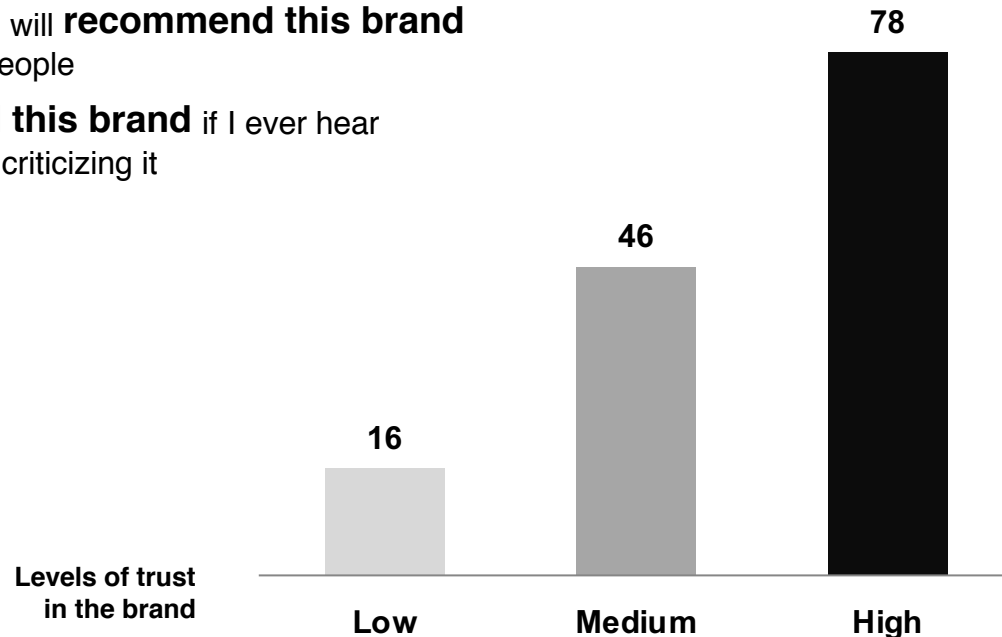
Jenny Yang poses for the #TakeOutHate campaign
Photo: Ajinomoto

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. “Engagement” is a net of attributes 7 and 8. General population, 11-mkt avg, by low trusters, medium trusters, and high trusters at TRU_BRAND. Please indicate how much you trust this brand using a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; bottom 3 box, low trust; codes 4-6, medium trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND_OE). Data shown is in aggregate across all four scenarios.

MORE TRUST, MORE ADVOCACY

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

- I am likely to **share or repost content about this brand**, or to post/share about my experiences with this brand
- If asked, I will **recommend this brand** to other people
- I **defend this brand** if I ever hear someone criticizing it



DOVE – The CROWN Act

Dove | CROWN Coalition

Help us reach 100,000 signatures to end hair discrimination.

Creating a **R**espectful and **O**pen **W**orld for **N**atural Hair.

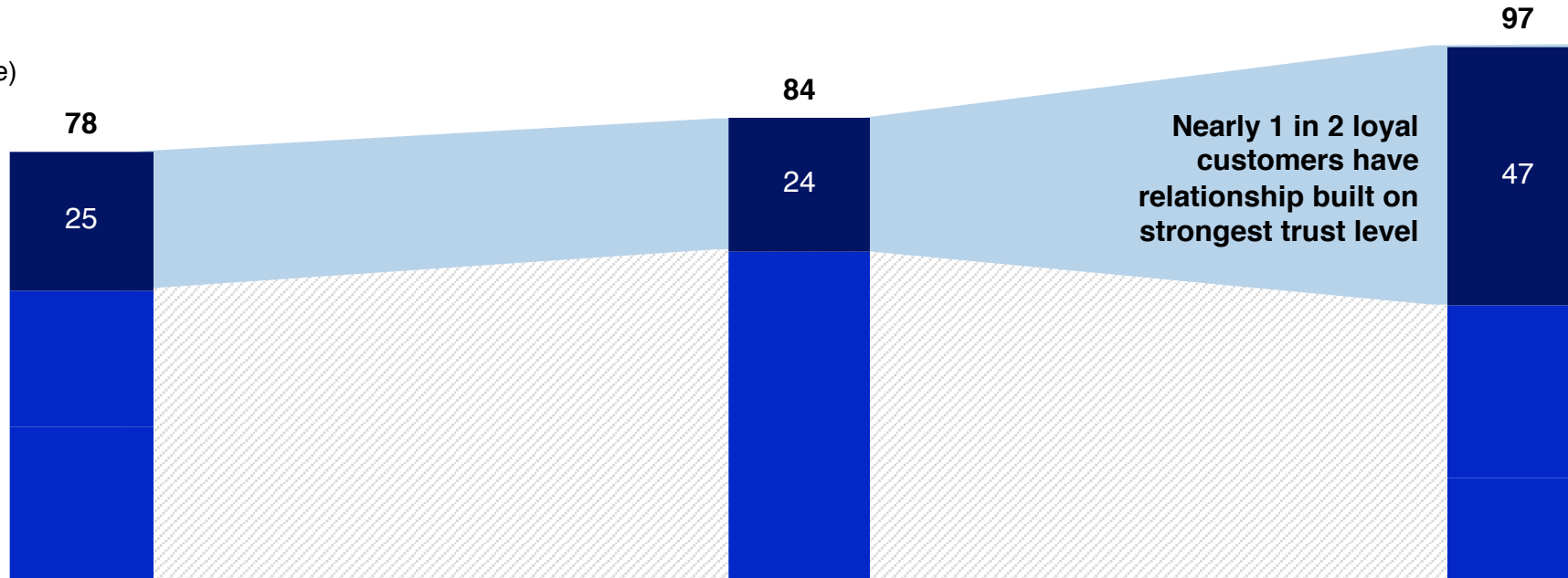
Sign The CROWN Act petition today!
TheCROWNAct.com

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. “Advocacy” is a net of attributes 4-6. General population, 11-mkt avg, by low trusters, medium trusters, and high trusters at TRU_BRAND. Please indicate how much you trust this brand using a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; bottom 3 box, low trust; codes 4-6, medium trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND_OE). Data shown is in aggregate across all four scenarios.

TRUST UNLOCKS DEEPER, MORE RESILIENT RELATIONSHIPS

Percent trust

■ Strongest trust
(9 on a 9-point scale)



Nearly 1 in 2 loyal customers have relationship built on strongest trust level

Shopper

Think about a brand that have recently considered purchasing but ultimately decided to get a different brand of the same type of product instead

First-time buyer

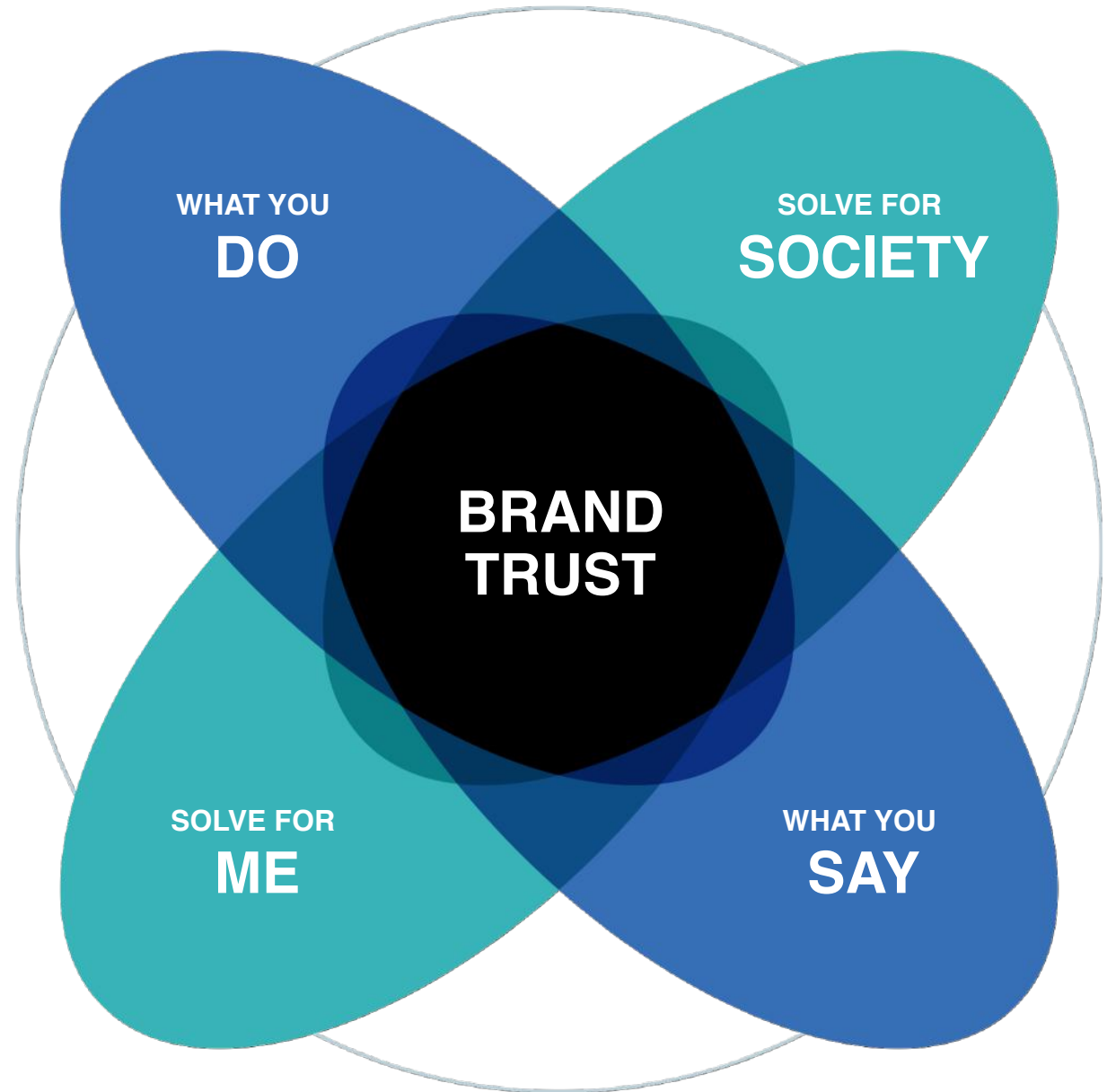
A brand that you recently just bought for the first time, but you have not yet become a regular purchaser of that brand

Loyal customer

A brand that you have been buying for a while on a regular basis, and that could consider you to be a reliable or loyal customer

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_BRAND. Please indicate how much you trust this brand using a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; code 9, strongest trust, codes 6-8, weak trust. Question asked of those who could name a brand for the scenario they were assigned to (BRAND_OE). Each scenario asked of one-fourth of the sample. General population, 11-mkt avg, by scenario.

**TRUSTED BRANDS LIVE AT
THE INTERSECTION OF
PERSONAL AND SOCIETAL,
WORDS AND ACTIONS**



BRAND TRUST IN 2020: TRUST DEFINES BRANDS

1

Amid seismic shocks, trust is the make-or-break difference for brands

2

It is time for brands to act: solve problems and advocate for change

3

Brand trust is earned—through both words and actions

4

Trust builds loyalty, engagement and advocacy

APPENDIX: SUPPLEMENTAL DATA

CONTENTS

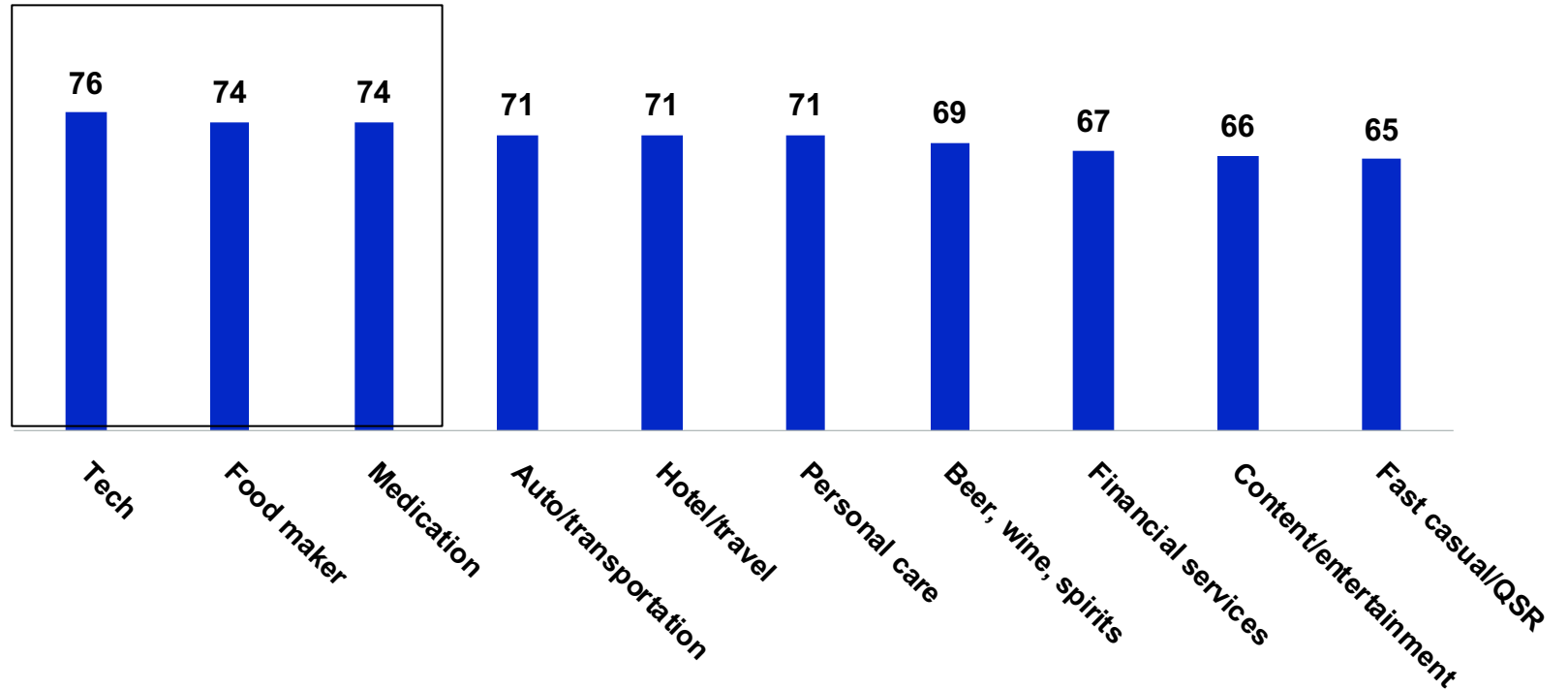
- Trust in brands, by market, demographic and category
- Reasons trust matters more, by market and demographic
- What people want brands to do, by market, demographic and category
- Voices of influence across markets and demographics
- More trust, more loyalty, engagement and advocacy (data for individual answer choices)

BRANDS ON THE FRONTLINE MOST TRUSTED

Percent trust



Brands in general



BRAND TRUST ACROSS MARKETS

Percent trust

	Global 11	Brazil	Canada	China	France	Germany	India	Japan	S. Africa	S. Korea	UK	U.S.
Brands in general	70	67	73	89	63	61	83	58	73	74	65	69
Tech	76	85	76	93	68	65	86	62	78	81	71	71
Food maker	74	80	78	92	65	62	80	64	73	72	74	73
Medication	74	73	78	92	64	62	81	65	75	77	78	72
Auto/transportation	71	80	71	92	66	51	82	65	72	72	65	69
Hotel/travel	71	79	70	91	68	61	79	62	68	66	68	70
Personal care	71	81	73	90	71	61	82	48	72	69	65	71
Beer, wine, spirits	69	75	73	90	66	64	65	62	62	66	70	65
Financial services	67	70	70	91	57	51	79	58	62	74	60	64
Content/entertainment	66	79	66	89	55	52	81	45	68	66	59	66
Fast casual/QSR	65	74	70	91	54	46	78	53	62	66	56	67

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_SEC. Please indicate how much you trust brands in each of the following industries, 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”. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

BRAND TRUST ACROSS DEMOGRAPHICS

Percent trust

	Global 11	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
Brands in general	70	70	73	69	71	70	63	73	76
Tech	76	77	78	74	78	75	70	78	81
Food maker	74	73	75	73	75	73	68	76	80
Medication	74	73	76	74	74	75	68	76	80
Auto/transportation	71	71	73	71	73	70	63	73	79
Hotel/travel	71	71	72	70	71	71	62	73	79
Personal care	71	72	74	67	68	74	65	73	76
Beer, wine, spirits	69	67	70	69	71	66	59	71	78
Financial services	67	67	68	66	68	66	59	69	74
Content/entertainment	66	74	71	54	65	66	61	68	71
Fast casual/QSR	65	68	68	59	66	64	60	67	69

REASONS BRAND TRUST MATTERS MORE THAN IN PAST ACROSS MARKETS

Percent who say each is a reason why brand trust has become more important

	Global 11	Brazil	Canada	China	France	Germany	India	Japan	S. Africa	S. Korea	UK	U.S.
PERSONAL VULNERABILITY NET	81	82	82	91	68	70	91	73	88	75	83	81
The COVID-19 pandemic has greatly increased my reliance on brands to keep me and the people in my community safe from the virus	35	28	38	36	21	23	54	29	43	29	36	42
The COVID-19 pandemic has greatly increased my reliance on brands to help me get through the day to day challenges of life during this crisis	33	35	33	38	19	23	51	28	38	22	32	37
Brands are collecting an ever-increasing amount of my personal information in their databases	28	24	34	25	28	28	31	18	22	19	40	33
I am relying more on brands to take care of important things in my life that I used to do myself	26	27	24	28	12	17	42	32	28	19	20	26
I have recently begun struggling financially and cannot afford to waste money on a bad purchase	26	33	27	20	20	16	32	23	45	21	21	22
I am using brands more as a way to express my values and to represent who I am. If they do something wrong or fail in some way, that reflects badly on me.	22	22	19	31	15	14	36	14	21	26	17	20
SOCIETAL IMPACT NET	74	81	75	80	73	74	79	62	73	63	74	68
How brands produce and deliver their products is having an increasingly large impact on the environment	44	51	47	31	49	52	46	31	47	39	49	41
Brands making smart decisions about when and how to reopen or resume normal business operations will have a huge impact on how quickly and safely the economy recovers	36	43	40	34	31	29	41	24	39	31	36	37
Brands are getting more involved than ever before in addressing major social issues and societal problems	34	48	34	30	29	26	40	37	34	21	35	33
The types of technological innovations that brands are creating, such as robotics and artificial intelligence, have the potential to cause much greater harm if misused than previous technological advances	26	27	30	30	24	20	36	16	29	15	27	24

2020 Edelman Trust Barometer Special Report: Brand Trust. IMP_WHY. You just indicated that it is more important to you to be able to trust the brands you buy today than in the past. Among the items listed below, please select those, if any, that best describe why it has become more important to you to be able to trust brands. Pick all that apply. Question asked of those that said it is more important to trust the brands they use today than in the past (IMP_TRU/1). General population, 11-mkt avg. "Personal Vulnerability" is a net of attributes 2-5, 8, and 9; "Societal Impact" is a net of attributes 1, 6, 7, and 10.

REASONS BRAND TRUST MATTERS MORE THAN IN PAST ACROSS DEMOGRAPHICS

Percent who say each is a reason why brand trust has become more important

	Global 11	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
PERSONAL VULNERABILITY NET	81	85	83	75	81	82	80	82	84
The COVID-19 pandemic has greatly increased my reliance on brands to keep me and the people in my community safe from the virus	35	37	36	33	35	36	31	35	39
The COVID-19 pandemic has greatly increased my reliance on brands to help me get through the day to day challenges of life during this crisis	33	35	36	28	33	34	30	34	37
Brands are collecting an ever-increasing amount of my personal information in their databases	28	27	28	28	29	26	23	28	32
I am relying more on brands to take care of important things in my life that I used to do myself	26	27	28	21	26	25	24	26	28
I have recently begun struggling financially and cannot afford to waste money on a bad purchase	26	28	29	22	24	28	34	27	20
I am using brands more as a way to express my values and to represent who I am. If they do something wrong or fail in some way, that reflects badly on me.	22	27	23	16	22	22	19	22	26
SOCIETAL IMPACT NET	74	74	72	75	74	73	68	75	77
How brands produce and deliver their products is having an increasingly large impact on the environment	44	42	43	49	42	46	40	45	46
Brands making smart decisions about when and how to reopen or resume normal business operations will have a huge impact on how quickly and safely the economy recovers	36	35	34	39	36	35	32	36	39
Brands are getting more involved than ever before in addressing major social issues and societal problems	34	36	34	32	34	34	30	35	37
The types of technological innovations that brands are creating, such as robotics and artificial intelligence, have the potential to cause much greater harm if misused than previous technological advances	26	28	25	25	27	25	24	26	28

2020 Edelman Trust Barometer Special Report: Brand Trust. IMP_WHY. You just indicated that it is more important to you to be able to trust the brands you buy today than in the past. Among the items listed below, please select those, if any, that best describe why it has become more important to you to be able to trust brands. Pick all that apply. Question asked of those that said it is more important to trust the brands they use today than in the past (IMP_TRU/1). General population, 11-mkt avg, and by age, gender, and income. "Personal Vulnerability" is a net of attributes 2-5, 8, and 9; "Societal Impact" is a net of attributes 1, 6, 7, and 10.

WHAT PEOPLE WANT BRANDS TO DO ACROSS MARKETS

Percent who rate each as very or extremely important for brands to earn or keep their trust

	Global 11	Brazil	Canada	China	France	Germany	India	Japan	S. Africa	S. Korea	UK	U.S.
Protector	63	81	63	72	62	52	77	25	75	59	62	63
Provider	69	90	71	73	72	71	77	27	82	65	67	68
Information	64	83	63	72	63	59	79	27	78	61	59	64
Innovator	63	83	60	72	59	53	79	29	77	60	55	60
Educator	55	77	51	70	50	36	74	21	72	52	46	55
Calming voice	52	66	46	70	46	43	71	24	64	48	44	52
Entertainment	46	57	40	69	45	39	63	22	51	42	39	45
Source of joy	58	70	48	70	55	55	74	37	70	62	47	53
Connector	51	64	45	69	47	43	72	20	62	53	43	49
Inspiration	53	72	45	71	46	45	73	22	67	49	43	49
Self-expression	48	64	40	69	39	30	70	19	60	49	37	46
Safety net	57	69	51	72	54	49	78	26	68	59	49	53
Collaborator	54	73	50	69	49	45	70	25	62	54	46	50
Problem solver	60	80	56	73	56	52	76	26	74	55	51	59
Shape culture	58	71	55	72	52	50	76	24	72	57	51	58
Visionary	61	80	57	73	57	51	77	31	75	60	52	60

2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND_KEEP. In general, how important is it to earning or keeping your trust that brands do each of the following? 5-point scale; top 2 box, important. General population, 11-mkt avg. Please see the Technical Appendix for full text for each role.

WHAT PEOPLE WANT BRANDS TO DO ACROSS DEMOGRAPHICS

Percent who rate each as very or extremely important for brands to earn or keep their trust

	Global 11	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
Protector	63	65	64	59	61	65	61	64	65
Provider	69	70	70	68	69	70	67	71	71
Information	64	68	66	59	63	65	61	66	67
Innovator	63	66	65	57	63	62	60	64	65
Educator	55	61	57	47	54	56	52	57	57
Calming voice	52	58	55	44	51	53	50	54	55
Entertainment	46	55	50	35	47	46	43	48	49
Source of joy	58	64	60	51	58	59	57	60	61
Connector	51	58	54	43	50	53	49	53	55
Inspiration	53	60	55	44	52	54	51	54	56
Self-expression	48	58	51	35	47	48	45	49	52
Safety net	57	62	59	51	55	59	55	59	60
Collaborator	54	59	56	47	53	55	51	56	57
Problem solver	60	64	62	54	59	60	57	61	63
Shape culture	58	65	61	49	57	59	55	59	61
Visionary	61	65	63	56	61	62	58	63	64

2020 Edelman Trust Barometer Special Report: Brand Trust. BRAND_KEEP. In general, how important is it to earning or keeping your trust that brands do each of the following? 5-point scale; top 2 box, important. General population, 11-mkt avg, and by age, gender, and region. Please see the Technical Appendix for full text for each role.

WHAT PEOPLE WANT BRANDS TO DO ACROSS CATEGORIES

Percent who rate each as very or extremely important for brands to earn or keep their trust

	Tech	Food maker	Medication	Auto/ transportation	Hotel/ travel	Personal care	Beer, wine, spirits	Financial services	Content/ entertainment	Fast casual/ QSR
Protector	62	65	65	62	63	58	49	64	57	59
Provider	69	70	69	67	66	64	53	70	65	64
Information	66	64	68	60	61	59	49	68	62	55
Innovator	65	61	63	63	56	57	46	62	58	53
Educator	57	55	55	51	49	51	42	57	54	46
Calming voice	51	54	58	47	55	49	44	55	55	49
Entertainment	54	45	39	45	59	44	47	40	62	50
Source of joy	56	56	46	52	62	54	53	48	64	56
Connector	55	52	49	50	53	47	45	51	55	50
Inspiration	51	50	48	48	51	54	43	49	53	45
Self-expression	49	46	43	46	46	51	41	44	49	43
Safety net	58	59	61	55	53	50	43	64	52	52
Collaborator	57	57	58	55	52	50	44	57	51	50
Problem solver	63	59	63	60	55	53	43	63	51	51
Shape culture	58	56	52	54	54	53	47	56	59	52
Visionary	64	59	61	62	57	55	45	61	58	53

VOICES OF INFLUENCE ACROSS MARKETS

Percent who say each is a credible spokesperson for brand trust

	Global 11	Brazil	Canada	China	France	Germany	India	Japan	S. Africa	S. Korea	UK	U.S.
Industry expert	60	70	60	76	45	61	70	36	68	50	62	61
A person like yourself	59	77	56	76	43	60	73	28	67	52	55	59
Brand technical expert	49	58	39	76	33	42	69	28	56	48	40	45
Founder	47	55	40	75	34	40	68	25	57	41	39	43
Brand employee	45	49	40	74	30	44	64	19	50	34	40	46
Celebrity that shares my hardships	44	49	34	75	28	35	64	26	55	46	32	37
Community hero	43	46	36	77	26	31	62	23	49	41	42	43
Brand CEO	40	45	29	74	27	31	65	20	45	36	30	34
Influencer with small following	40	43	31	72	25	24	66	20	47	41	32	36
Influencer with millions of followers	34	33	24	71	20	23	65	16	38	31	24	28
Celebrity	30	27	20	75	18	24	55	15	29	29	19	24

2020 Edelman Trust Barometer Special Report: Brand Trust. CRE_WRT. Below is a list of people. If a brand were to use each as their spokesperson to try and convince you they are a brand worthy of your trust, how credible would they be? 4-point scale; top 2 box, credible. General population, 11-mkt avg.

VOICES OF INFLUENCE ACROSS DEMOGRAPHICS

Percent who say each is a credible spokesperson for brand trust

	Global 11	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
Industry expert	60	65	61	54	61	59	54	61	66
A person like yourself	59	64	61	52	60	58	56	60	63
Brand technical expert	49	57	51	38	50	47	46	49	52
Founder	47	54	49	38	49	45	45	48	50
Brand employee	45	52	47	35	45	44	42	45	48
Celebrity that shares my hardships	44	54	45	33	45	43	43	45	46
Community hero	43	54	46	31	44	43	41	44	48
Brand CEO	40	49	42	28	42	38	40	40	43
Influencer with small following	40	52	41	27	40	39	38	40	43
Influencer with millions of followers	34	44	37	21	36	32	32	35	37
Celebrity	30	41	33	18	32	29	30	31	33

2020 Edelman Trust Barometer Special Report: Brand Trust. CRE_WRT. Below is a list of people. If a brand were to use each as their spokesperson to try and convince you they are a brand worthy of your trust, how credible would they be? 4-point scale; top 2 box, credible. General population, 11-mkt avg, and by age, gender and income.

TECHNICAL APPENDIX

CONTENTS

- Additional methodology and MOE detail on three studies
- What brands must do: full question text
- How we calculated the nets for loyalty, engagement and advocacy

METHODOLOGY: MARGIN OF ERROR

Brand Trust 2020 Sector- and scenario- specific margin of error* (applies to questions TRU_JNY, TRU_BRAND, GEN_PER, TRU_KPI, SEC_KEEP, SEC_PER)	2020 Edelman Trust Barometer Special Report: Brand Trust and the Coronavirus Pandemic	2020 Edelman Trust Barometer Special Report: Brands and Racial Justice
<ul style="list-style-type: none"> • 11-market average relationship scenarios data +/- 1.3% (smallest n=5,829 for “first time purchase” scenario) • 11-market average trust driver scenarios data +/- 1.9% (smallest n=2,797 for “non-purchaser” scenario) • 11-market average sector data +/- 1.4% (smallest n=4,663 for the “streaming content and entertainment” sector) • Market-specific relationship scenarios data +/- 4.4% (smallest n=499 for “first time purchase” scenario) • Market-specific trust driver scenarios data +/- 8.2% (smallest n=142 for “first time purchaser” scenario) • Market-specific sector data +/- 4.9% (smallest n=396 for “quick serve restaurant” sector) 	<ul style="list-style-type: none"> • 12-market global data margin of error: +/- 0.9% (n=12,000) • Market-specific data margin of error: +/- 3.1 (n=1,000) 	<ul style="list-style-type: none"> • U.S. total margin of error: +/- 2.2% (n=2,000) • Ethnicity-specific data margin of error: Non-Hispanic White +/- 2.8% (n=1,222); all others +/- 6.2% (n=250)

*calculated on unweighted sample sizes

WHAT BRANDS MUST DO: FULL QUESTION TEXT

Shortened Text	Full Text
Protector	Be a protector , doing everything it can to ensure the safety and wellbeing of its employees, customers, and communities
Provider	Be a dependable provider , ensuring that people have easy and affordable access to the products and services they need
Information	Be a reliable source of information , keeping people informed about what they need to know to protect themselves and make good life decisions
Innovator	Be an innovator , developing new products and services to help people meet the daily challenges of life
Educator	Be an educator , offering people instruction to help them learn new skills, be more self-sufficient, and be smarter about how to get things done
Calming voice	Be a calming voice , helping to relieve people's anxieties
Entertainment	Be a source of entertainment , escapism, and distraction from people's problems and concerns
Source of joy	Be a source of joy in people's lives
Connector	Be a connector , helping people to stay emotionally close to others, access the social support they need, and to feel a sense of community

Shortened Text	Full Text
Inspiration	Be a personal inspiration , helping people to see themselves in a more positive way and to become a better version of themselves
Self-expression	Be a means of self-expression , helping people to be seen by others in the way they want to be seen and to convey who they are to the world
Safety net	Be a safety net , stepping in to fill gaps in the government's response to a crisis or in meeting the needs of underserved populations
Collaborator	Be a collaborator , partnering with government, NGOs, and even competitor brands to mount the strongest and most effective possible responses to our societal challenges
Problem solver	Be a problem solver , developing new solutions to our country's problems
Shape culture	Be a positive force in shaping our culture by influencing what are acceptable behaviors and attitudes and elevating those who are inspirational to others in the arts, athletics, intellectual pursuits and in creating social change
Visionary	Be a visionary , looking towards the future and working to make it better than the present

HOW WE CALCULATED THE NETS FOR LOYALTY, ENGAGEMENT AND ADVOCACY

Percent who will take one or more of these actions on behalf of a brand, among respondents with various levels of trust in the brand

	Low Trust	Medium Trust	High Trust
Loyalty (net)	12	48	75
I will buy this brand even if it is not on sale or the cheapest	6	24	48
This is the only brand of this product that I will buy. If it is not available, I will not buy another brand.	3	12	24
If this brand put out a new product, I would be very interested in buying it and would check it out immediately	7	27	48
Engagement (net)	25	45	60
I am comfortable sharing my personal information with this brand	11	23	39
I pay attention to this brand's advertising and other marketing communications	18	31	42
Advocacy (net)	16	46	78
I am likely to share or repost news or online content about this brand or to post/share information about my experiences with this brand	9	18	31
If asked, I will recommend this brand to other people I know who are looking for this type of product	7	30	61
I defend this brand if I ever hear someone criticizing it	4	12	33

2020 Edelman Trust Barometer Special Report: Brand Trust. TRU_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. "Loyalty" is a net of attributes 1-3; "Advocacy" is a net of attributes 4-6; "Engagement" is a net of attributes 7 and 8. General population, 11-mkt avg, by low trusters, medium trusters, and high trusters at TRU_BRAND. Please indicate how much you trust this brand using a 9-point scale where one means that you "do not trust it at all" and nine means that you "trust it a great deal". 9-point scale; bottom 3 box, low trust; codes 4-6, medium trust; top 3 box, high trust. Questions asked of those who could name a brand for the scenario they were assigned to (BRAND_OE). Data shown is in aggregate across all four scenarios.

EDELMAN TRUST BAROMETER SPECIAL REPORT: BRAND TRUST IN 2020

RESEARCH TEAM AND CONTRIBUTORS

Executive Director

Tonia E. Ries
tonia.ries@edelman.com

Executive Advisors

Richard Edelman

| *Brand*

Megan Van Someren
Lee Maicon
Michele Anderson
Jackie Cooper
Judy John
Kary Laskin
Ruth Warder
Lisa Ross

Executive Editor

Nancy Jeffrey

VP of Operations

Sarah Adkins

Sr. Project Manager

Esther Choi

Head of Thought
Leadership Research

David M. Bersoff, Ph.D.
david.bersoff@edelmanintelligence.com

| *Brand Measurement*

Antoine Harary
Louise Turner

Sr. Research Manager

Cody Armstrong

Research Coordinators

Giuseppe Bovenzi
Nick Maxwell

Assoc. Research Coordinator

Abbey Fox

Assoc. Data Processor

John Zamites