

A photograph of two people from behind, holding hands and reaching towards a bright sun in a park setting. The person on the left has blonde hair and wears a tan jacket with a black backpack. The person on the right has dark curly hair and wears a dark top. The background shows trees and a path, with a strong lens flare from the sun.

SPECIAL REPORT: **BRAND TRUST IN 2020**

Edelman Trust
Barometer 2020



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

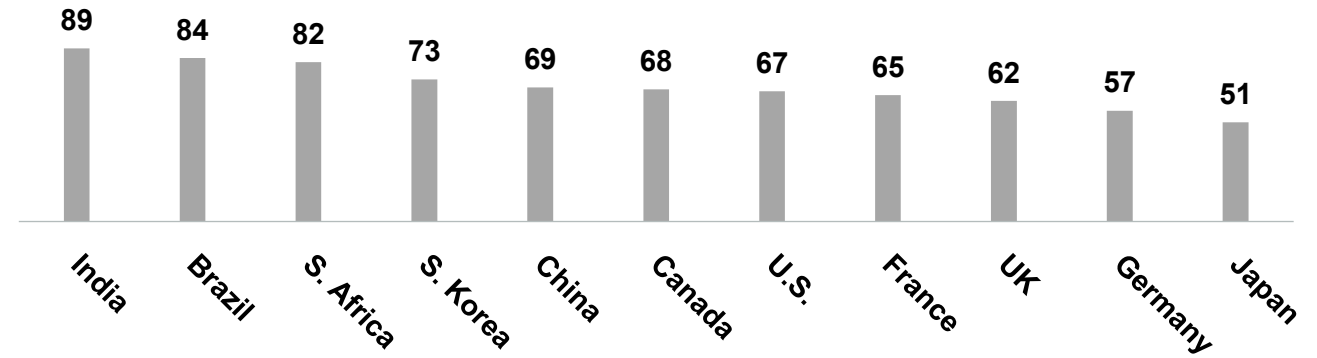
A BIGGER NEED FOR BRAND TRUST TODAY THAN IN PAST

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

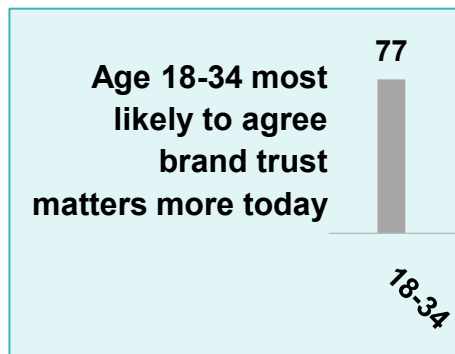
70%

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

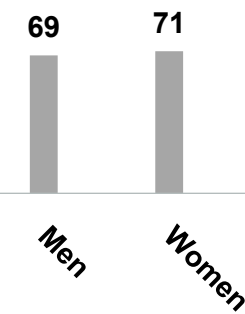
MARKETS



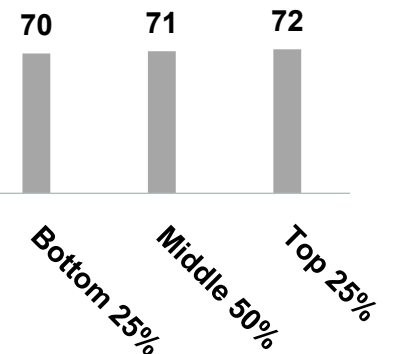
AGE



GENDER



INCOME



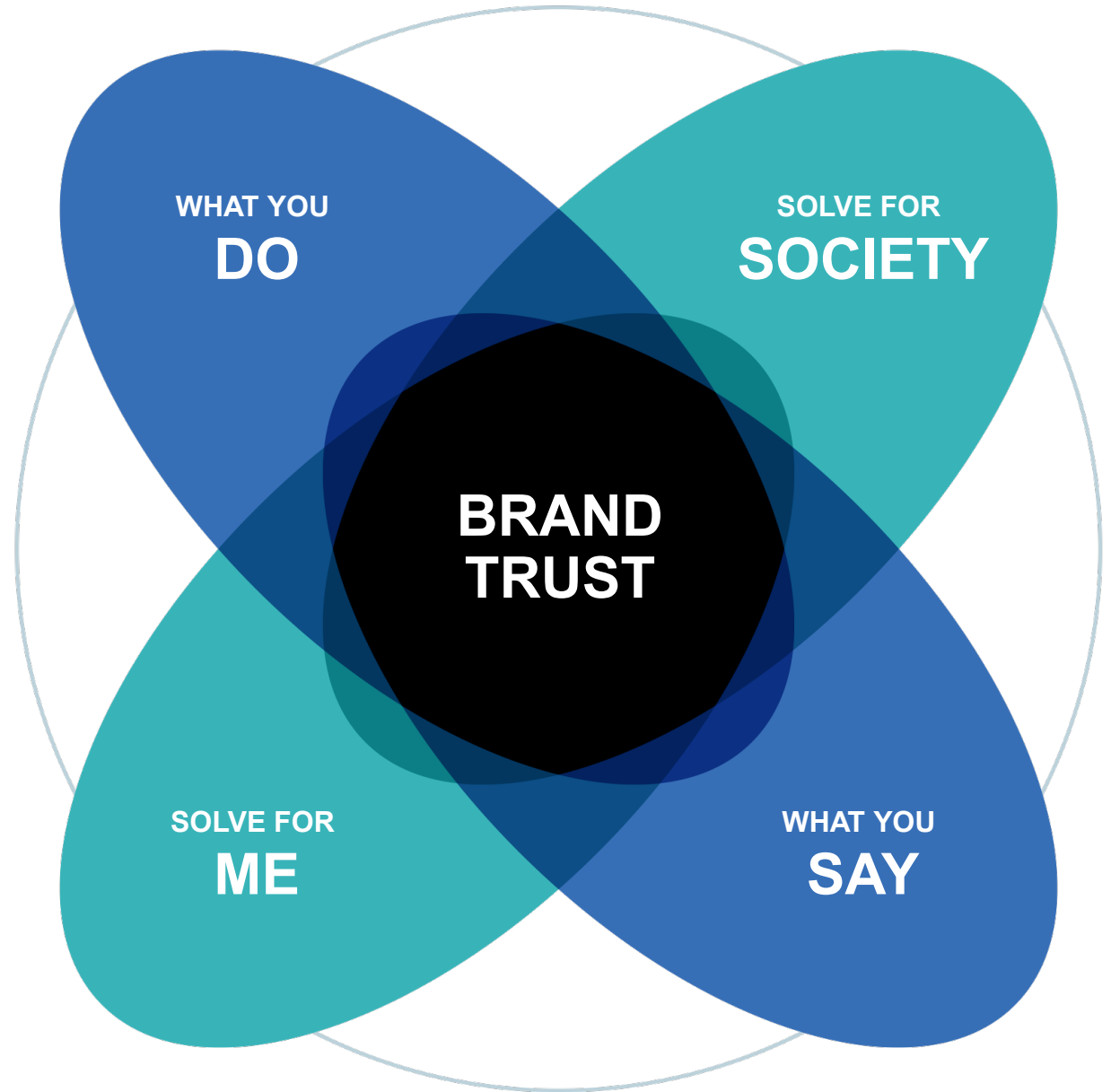
REASONS BRAND TRUST MATTERS MORE THAN IN PAST ACROSS DEMOGRAPHICS

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

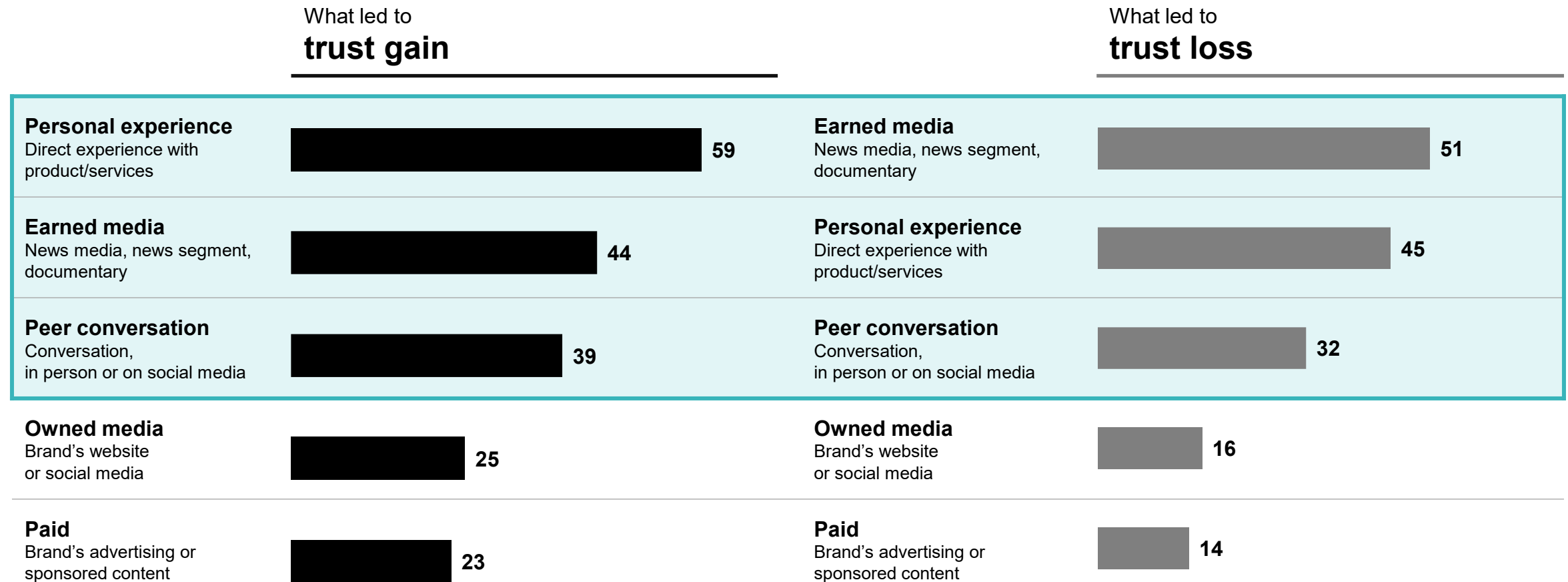
2020 Edelman Trust Barometer Special Report: Brand Trust. IMP_WHY. You just indicated that it is more important to you to be able to trust the brands you buy today than in the past. Among the items listed below, please select those, if any, that best describe why it has become more important to you to 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.

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



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.

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.

SOME BRAND CATEGORIES EXPECTED TO DO MORE THAN OTHERS

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

Importance

60 points or more

50-59 points

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

BRAND ROLES

MEETING PEOPLE'S BASIC NEEDS

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

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

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

Being an innovator developing new products and services to help people meet the daily challenges of life

Being an educator offering people instruction to help them learn new skills, be more self-sufficient, and be smarter about how to get things done

MEETING PEOPLE'S EMOTIONAL NEEDS

Being a calming voice helping to relieve people's anxieties

Being a source of entertainment, escapism, and distraction from people's problems and concerns

Being a source of joy in people's lives

MEETING PEOPLE'S SOCIAL NEEDS

Being a connector helping people to stay emotionally close to others, access the social support they need, and to feel a sense of community

MEETING PEOPLE'S SELF BETTERMENT AND SELF ACTUALIZATION NEEDS

Being a personal inspiration helping people to see themselves in a more positive way and to become a better version of themselves

Being 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

MEETING SOCIETY'S BASIC NEEDS

Being a safety net stepping in to fill gaps in the government's response to a crisis or in meeting the needs of undeserved populations

Being a collaborator partnering with government, NGOs, and even competitor brands to mount the strongest and most effective possible responses to our social challenges

Being a problem solver developing new solutions to our country's problems

MEETING SOCIETY'S NEEDS FOR BETTERMENT

Being 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

Being a visionary looking towards the future and working to make it better than the present

Irish Brands Stepping Up



SUPPORTERS

These brands are perceived to making a positive contribution to this crisis but it is unclear how much of a sacrifice they are actually making



SAVIOURS

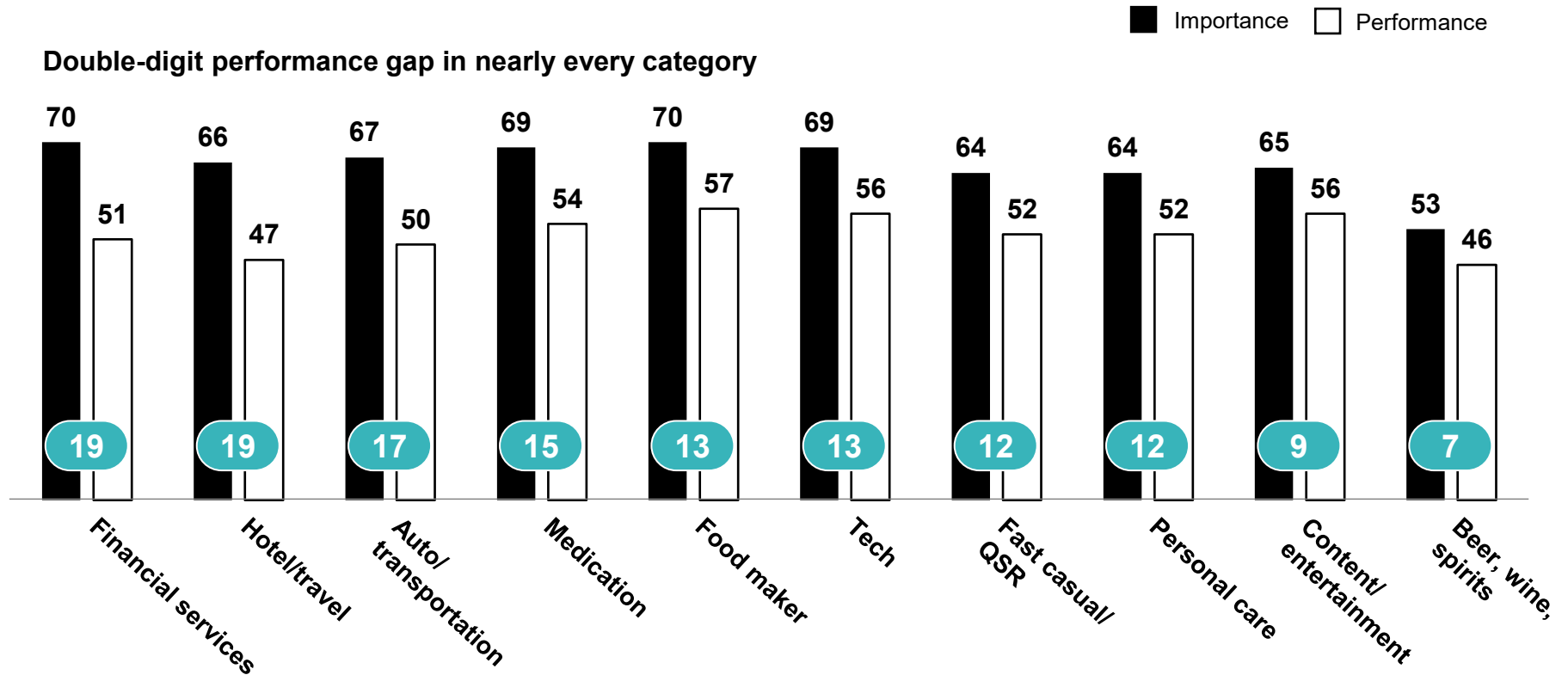
Perceived to be really stepping forward and making genuine and impactful efforts to help those most at risk. These will be the brands that get remembered for the collective good.

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.

What if SuperValu became a **DEPENDABLE PROVIDER**?

What this means specifically:

**A brand that ensures people have
easy and affordable access to the
products and services they need.**

Meeting People's Basic Needs

What could you solve for **Society**?

What could you solve for **Individuals**?

What would you **Say**?

What would you **Do**?

What if SuperValu became a **DEPENDABLE PROVIDER?**

What this means specifically:

A brand that ensures people have easy and affordable access to the products and services they need.

Meeting People's Basic Needs

What could you solve for **Society?**

Ensure access to food and supplies in a safe environment.

What could you solve for **Individuals?**

Provide a safe and reliable grocery service so I can get what I need with peace of mind.

What would you **Say?**

Outline all the steps taken to ensure safe delivery, educate customers on healthy practices etc.

What would you **Do?**

Safeguard the supplies of critical products. Create a safe environment for employees and customers, through screens, sanitiser, social distancing information. Open at special times for the elderly .and create a separate delivery service for those most vulnerable.

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

What if Irish Distillers became a **COLLABORATOR?**

What this means specifically:

A brand that partners with government, NGOs, and even competitor brands to mount the strongest and most effective possible responses to our societal challenges.

Meeting Society's Basic Needs

What could you solve for **Society**?

What could you solve for **Individuals**?

What would you **Say**?

What would you **Do**?

What if Irish Distillers became a COLLABORATOR?

What this means specifically:

A brand that partners with government, NGOs, and even competitor brands to mount the strongest and most effective possible responses to our societal challenges.

Meeting Society's Basic Needs

What could you solve for **Society**?

Chronic shortage of alcohol gel for frontline services .

What could you solve for **Individuals**?

Peace of mind that our frontline services have the gel they need to protect themselves and us

What would you **Say**?

We're here to do our part, that's why we will donate alcohol, free of charge to the HSE for as long as it's needed.

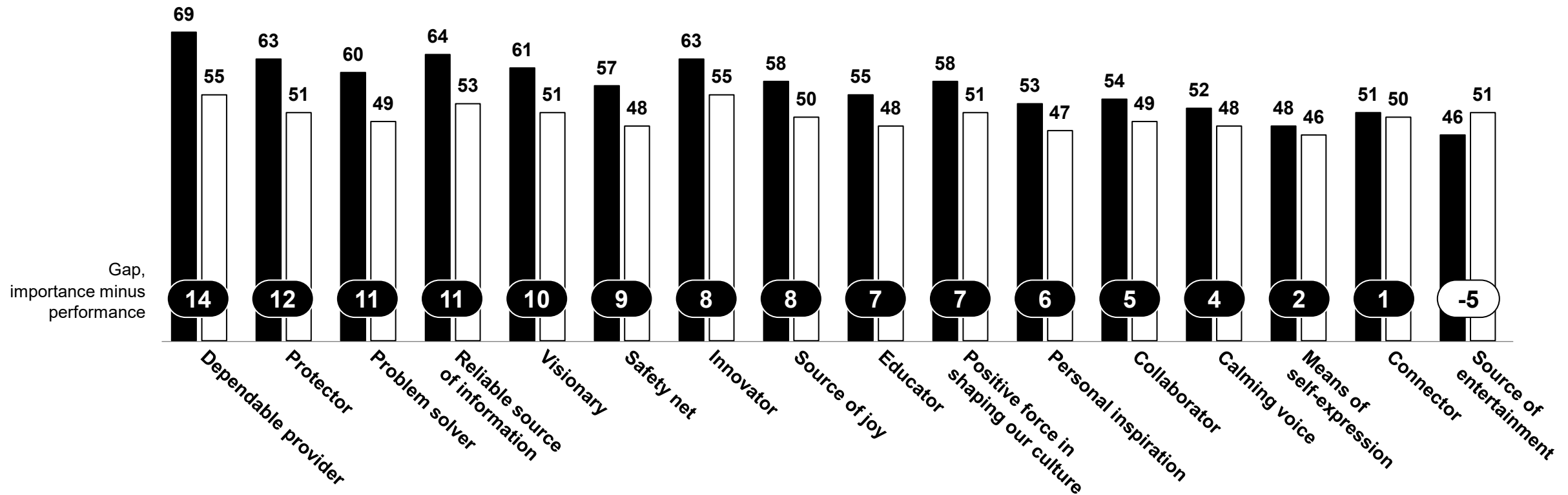
What would you **Do**?

Partner with Mervue labs to deliver large quantities of alcohol gel for use in hand sanitisers for the HSE.

IN THE FACE OF THE CURRENT CRISES, ROLES BRANDS CAN PLAY

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

■ Importance □ Performance



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. COV_PER. In the face of this COVID-19 pandemic and its economic consequences, how well do you feel brands in general 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. General population, 11-mkt avg.

an
post

What if _____ *An Post* became a **CONNECTOR**?

What this means specifically:

A brand that helps people to stay emotionally close to others, access the social support they need, and to feel a sense of community.

Meeting People's Social Needs

What could you solve for **Society**?

As people isolate at home never before are they more disconnected from their friends and neighbours. .How do you ensure people stay connected when they're apart?

What could you solve for **Individuals**?

Help me stay connected with my friends and family as we maintain physical distance.

What would you **Say**?

Staying connected, now more than ever .

What would you **Do**?

Checking in on the vulnerable, sending cards to loved ones, create ImagineNation to entertain children and deliver newspapers to those in need.

BRAND TRUST IN 2020: EXPLORING THE PERMISSION SPACE

1

Exploring a
Brand's Trust
Profile

2

The Value of Trust:
Explore the
Opportunity

3

Exploring the
Roles the Brand
Could Play

4

Determining How
Bold You Could Be

Darragh Rea

Darragh.rea@edelman.com

Twitter: @darraghjrea