



# SPECIAL REPORT: **BRAND TRUST IN 2020**

S. Africa Findings

**Edelman Trust  
Barometer 2020**



## 2019: BRAND TRUST RANKS AS TOP FIVE BUYING CRITERION

Percent who rate each as important in their buying decision

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

## BUYING ON BELIEF BECOMES THE NEW NORMAL

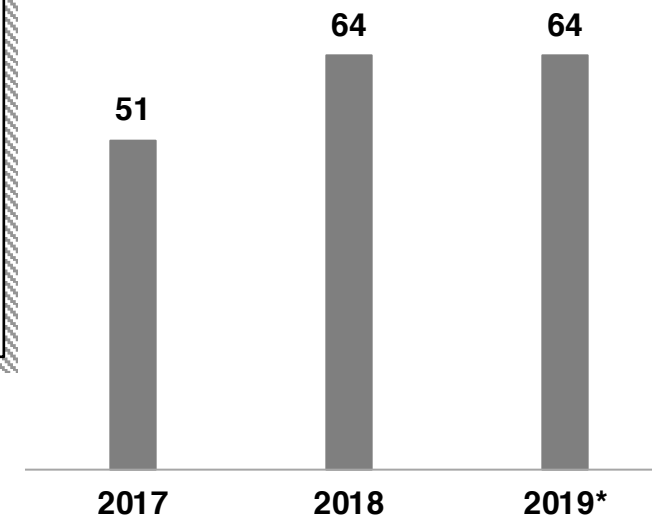
Percent who choose, switch, avoid or boycott a brand based on its stand on societal issues

### Brand Democracy

I believe brands can be a powerful force for change.

I expect them to represent me and solve societal problems.

My wallet is my vote.



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, in S. Africa

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

92%

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

52

40

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

65%



# 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

S. Africa

73%

Canada	65
Germany	64
U.S.	64
France	58
UK	57

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

S. Africa

46%

Canada	57
UK	56
U.S.	52
France	50
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**

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## 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

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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 IS TOP OF MIND FOR FIRST-TIME PURCHASE AND LOYALTY

Percent who say they **focus most on** each brand attribute, in S. Africa

Brand attributes that are most top of mind when deciding whether to...	buy a new brand	become a loyal customer
Its price and affordability	80	70
The reputation of the brand	59	53
How easy it is to find and buy the brand	58	61
<b>Whether you trust the company that owns the brand <i>or</i> brand that makes the product</b>	<b>58</b>	<b>51</b>
Whether you trust the product to perform well and do everything you need it to do	52	53
How well it treats its customers	48	48
How well it treats the environment	41	43
If they get the ingredients and materials they use locally, sustainably and ethically	35	34
What people you know think about the brand	31	21
How the brand has responded in the face of the COVID-19 pandemic	30	32





# MORE PEOPLE CHOOSING BRANDS ON TRUST

Percent who trust most of the brands they buy or use

— 0 — + Change, 2019 to 2020

**46%**

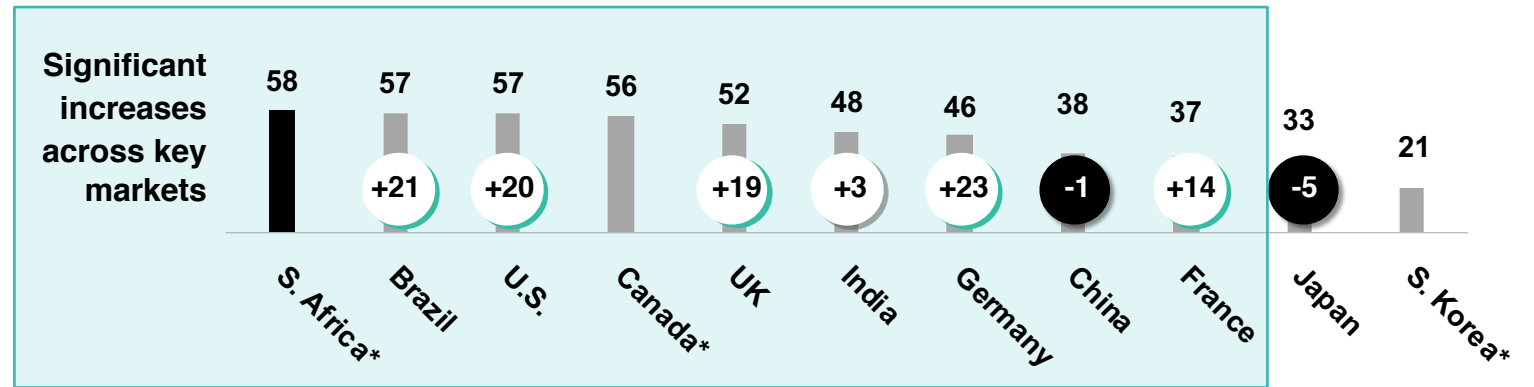


+12 pts

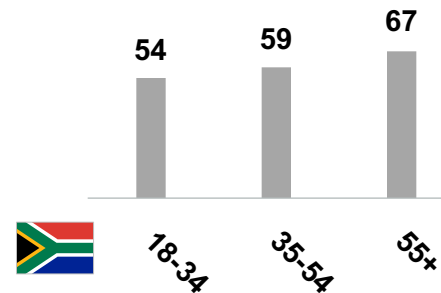
Change,  
2019 to 2020

trust most of the  
brands they buy or use

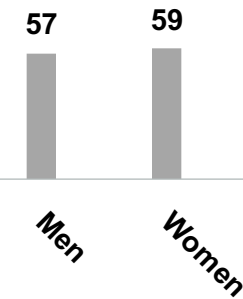
## MARKETS



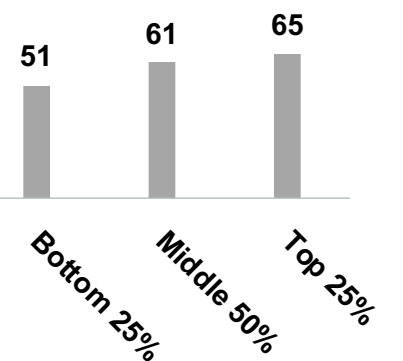
## AGE



## GENDER



## INCOME



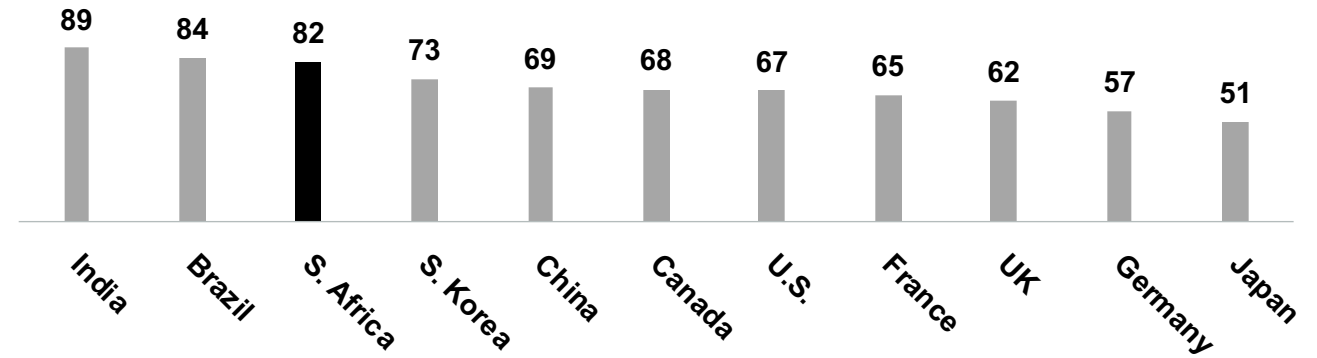
# A BIGGER NEED FOR BRAND TRUST TODAY THAN IN PAST

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

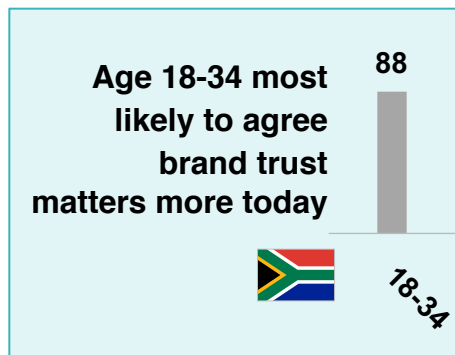
# 70%

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

## MARKETS



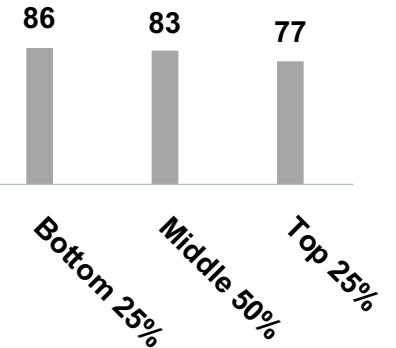
## AGE



## 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, in S. Africa

## My Personal Vulnerability

I am struggling financially and can't afford to waste money	45
The pandemic has increased my reliance on brands to keep me and my community safe	43
The pandemic has increased my reliance on brands to help me get through day-to-day challenges	38
I rely more on brands to do important things for me	28
Brands are collecting more of my personal information	22
I use brands to express my values and don't want them to reflect badly on me	21

**88%** net

## Brands' Societal Impact

How brands produce and deliver products has a large impact on the environment	47
Brands will have a huge impact on how quickly and safely the economy recovers	39
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	29

**73%** 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, S. Africa. "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, in S. Africa, and change from April to June 2020

—●—○—●+ 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

37%  
Change, Apr 2020 to Jun 2020: +7 pts

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

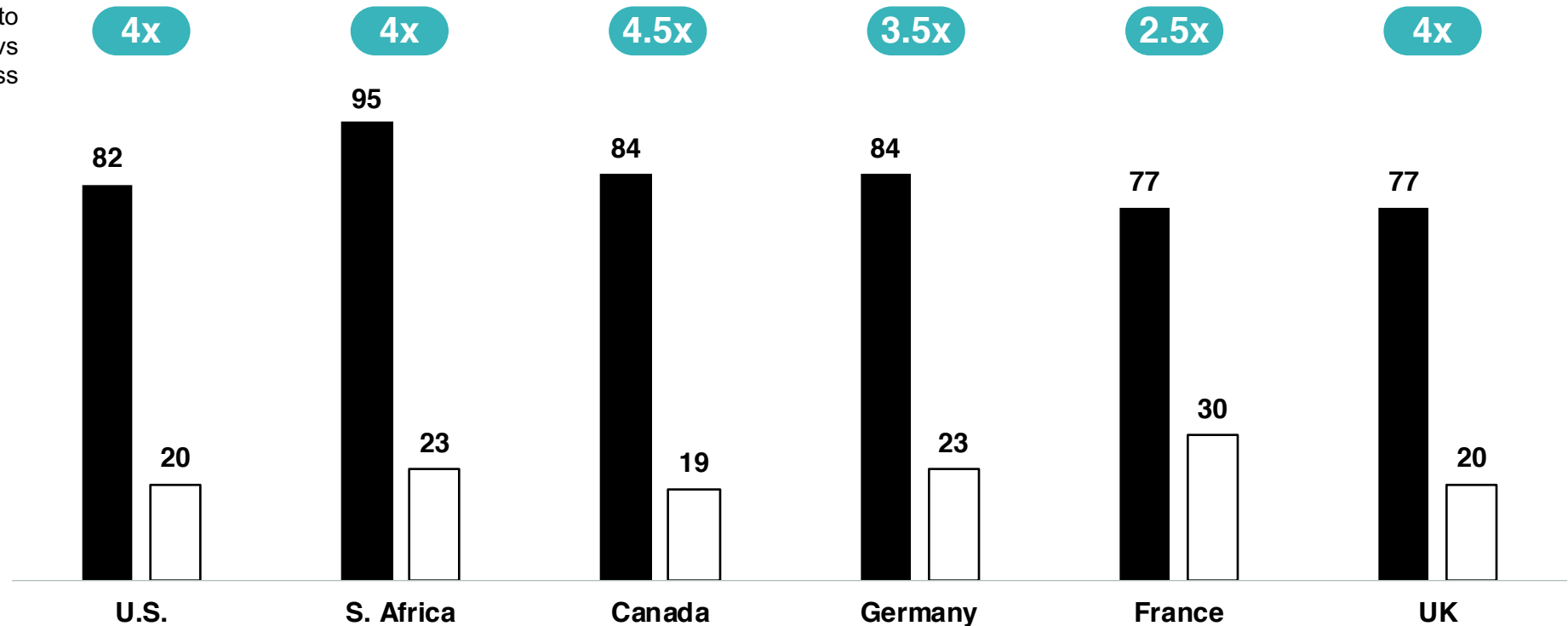
32%  
Change, Apr 2020 to Jun 2020: +5 pts

# 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 man with glasses and a beard, wearing a dark shirt, is leaning over a young child with curly hair wearing a white t-shirt. They are both focused on a small, orange, bulbous object that the man is holding. The child is using a pair of black-handled scissors to cut into the object. The background is a blurred outdoor setting with trees. The image has a blue overlay on the left side with white text.

**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, in S. Africa

## Solve my problems

Be a dependable provider	82
Be a reliable source of information	78
Be an innovator	77
Be a protector	75
Be an educator	72
Be a calming voice	64
Be a connector	62

## Solve society's problems

Be a visionary	75
Be a problem solver	74
Be a positive force in shaping our culture	72
Be a safety net	68
Be a collaborator	62


## Enrich my life

Be a source of joy	70
Be a personal inspiration	67
Be a means of self-expression	60
Be a source of entertainment/distraction	51

**94%** net

**90%** net

**85%** 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, S. Africa. "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, in S. Africa

More important	More	Less
How much the product <b>costs</b>	51	10
If the brand <b>makes me feel safe</b> using it	47	7
How well the brand <b>treats its employees</b>	36	10
Whether or not the brand is <b>environmentally friendly and sustainably made</b>	36	12
Whether or not the product is <b>made in this country</b>	34	17

Less important	More	Less
Whether the brand communicates that <b>I am successful</b>	14	34
Whether the brand communicates that <b>I am a taste maker or trend setter</b>	14	33
Whether I associate the brand with <b>excitement and adventure</b>	16	27

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

Percent who want this from brands, in S. Africa

■ 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

**93%**

56

37

**Partner with government  
and relief agencies to address  
the crisis**

**95%**

62

33



# 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, in S. Africa

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

S. Africa

72%

## 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

S. Africa

73%

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

Germany	63
Canada	58
U.S.	58
France	51
UK	50

S. Africa

74%

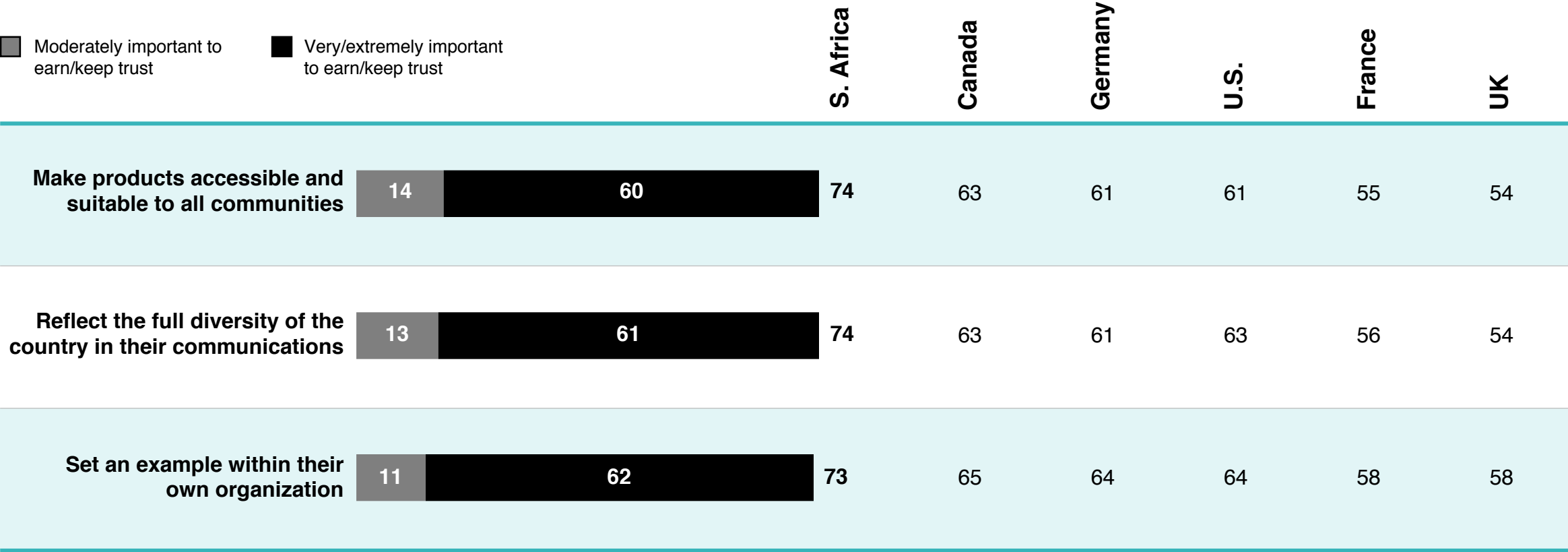
Invest in **addressing the root causes** of racial inequality

Germany	63
Canada	60
U.S.	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, S. Africa. 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.

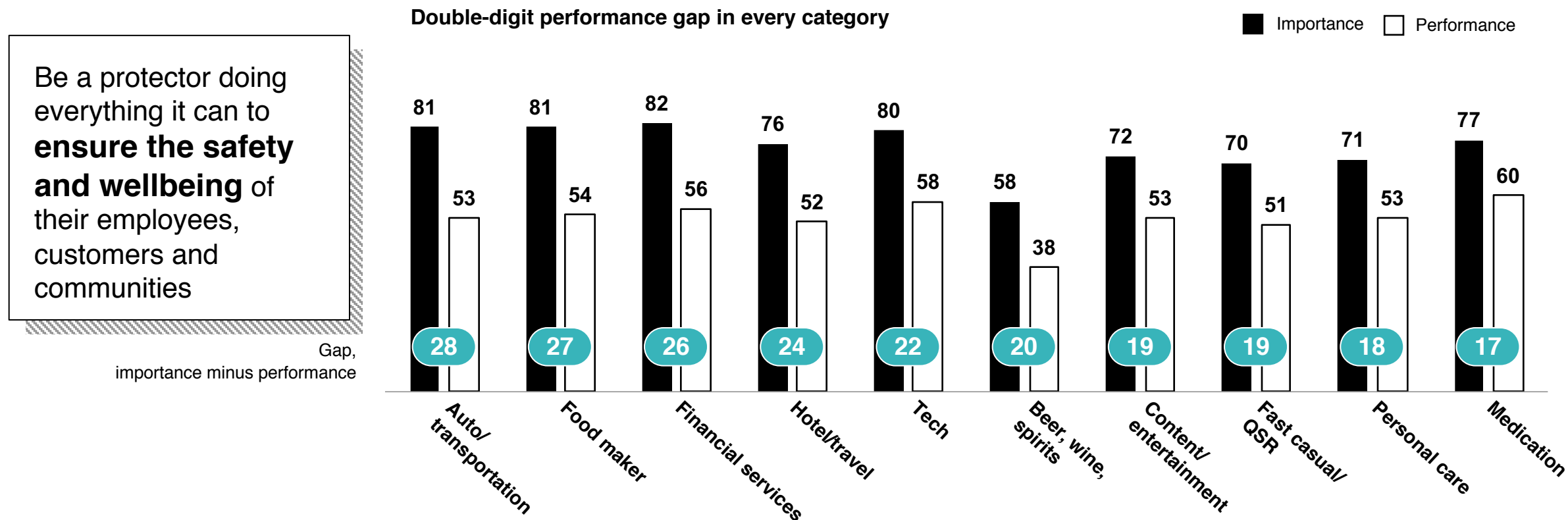
# IN THE FACE OF SYSTEMIC RACISM, BRANDS MUST ACT TO GET THEIR OWN HOUSE IN ORDER

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



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

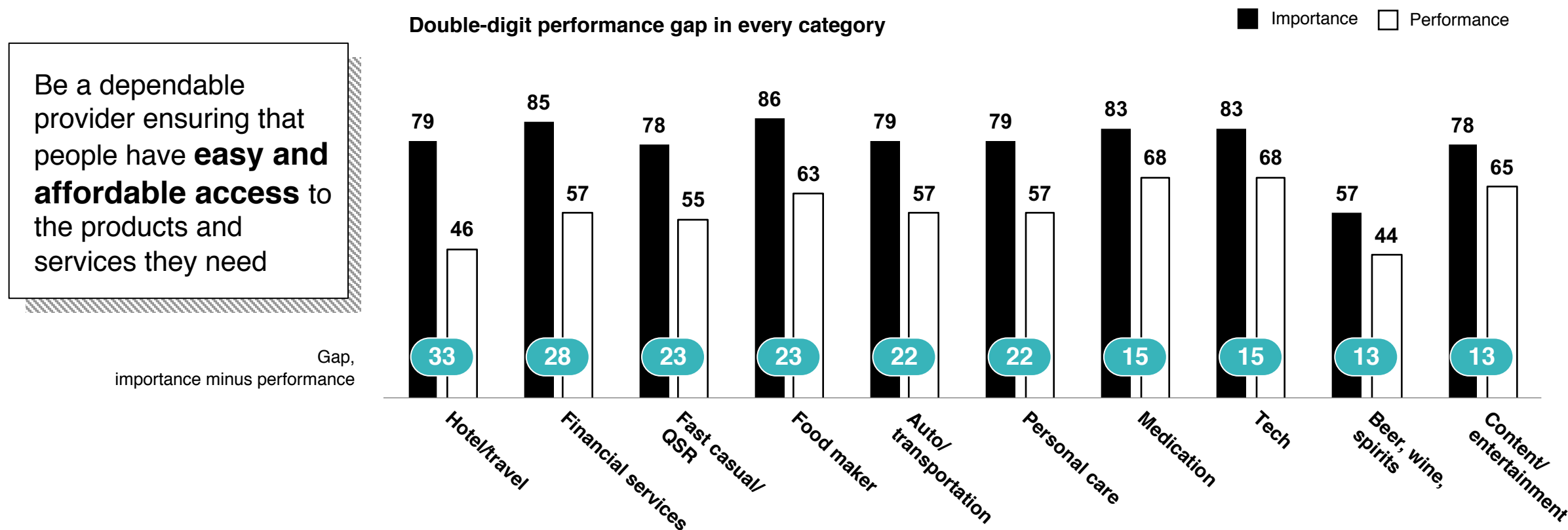
Percent who rate this as very or extremely important for brands to earn or keep their trust;  
who say that brands are currently performing well on this; and the gap, in S. Africa



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, S. Africa, 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, in S. Africa



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, S. Africa, by sector.







**BRAND  
TRUST IS  
EARNED,  
NOT  
BOUGHT**



# 7 IN 10 AVOIDING ADVERTISING

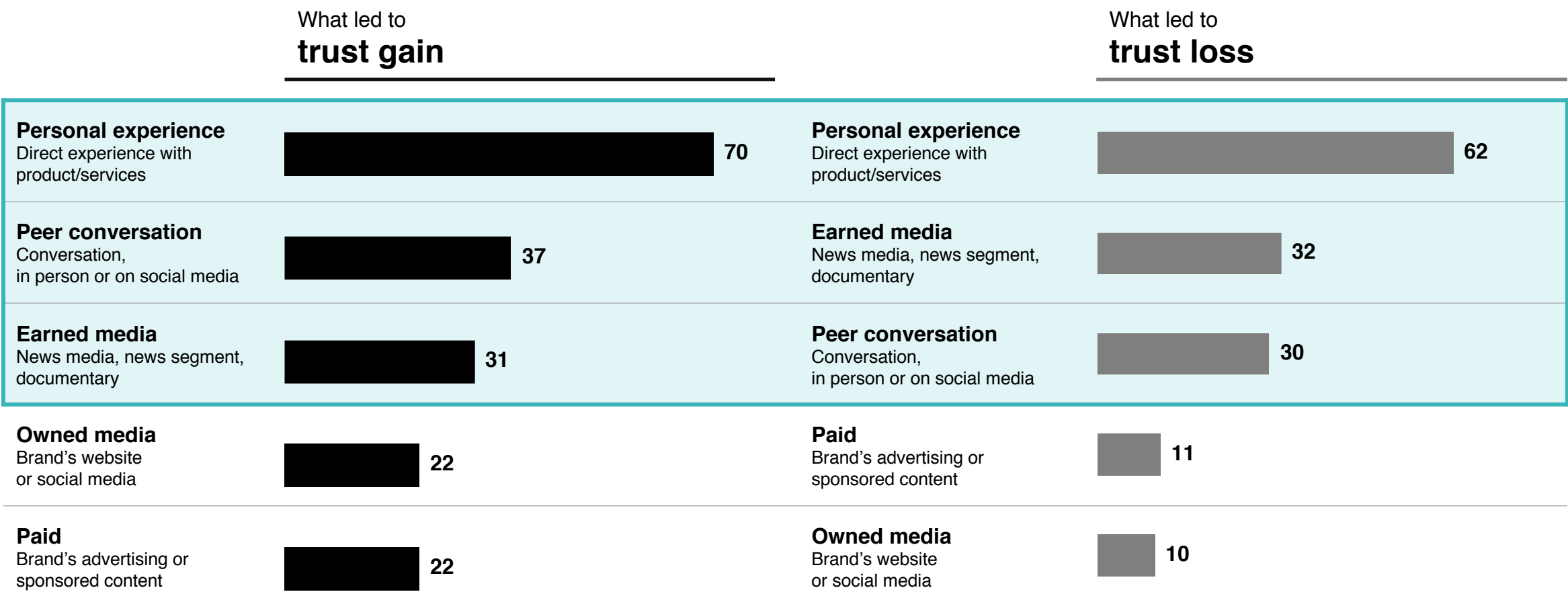
Percent who agree, in S. Africa

	S. Africa	Age 18-34	Age 35-54	Age 55+	Bottom 25%	Middle 50%	Top 25%
Use one or more advertising avoidance strategies ( <i>net</i> )	71	75	69	67	70	71	76
Changed media habits to see less advertising	47	51	45	41	44	47	52
Use ad blocking technology	42	47	40	33	40	43	46
Have found ways to avoid almost all ads	40	44	37	36	38	40	46
Pay for streaming service	37	43	34	27	35	34	47



# EARNED IS THE BATTLEGROUND FOR TRUST

Percent who say each led to a gain or loss of trust in a brand, in S. Africa



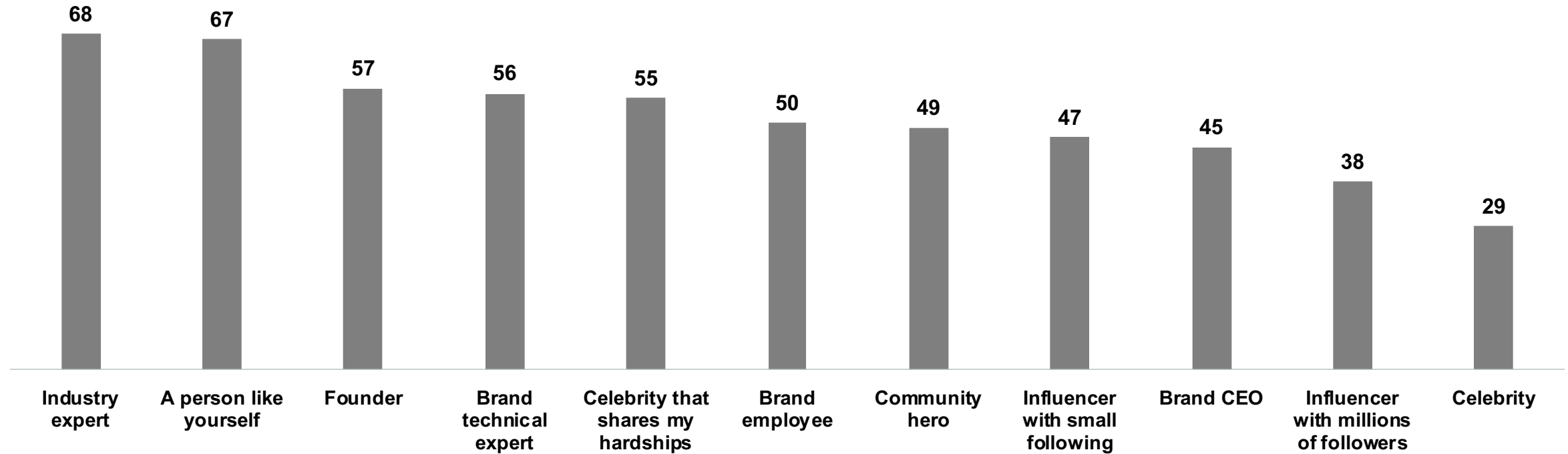
2020 Edelman Trust Barometer Special Report: Brand Trust. TRU\_GND\_SRC. What led you to gain trust in this particular brand? Pick all that apply. Question asked among those that gained trust in a specific brand within the past year (TRU\_GND/1). TRU\_LOST\_SRC. What led you to lose trust in this particular 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, S. Africa. "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, in S. Africa

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**

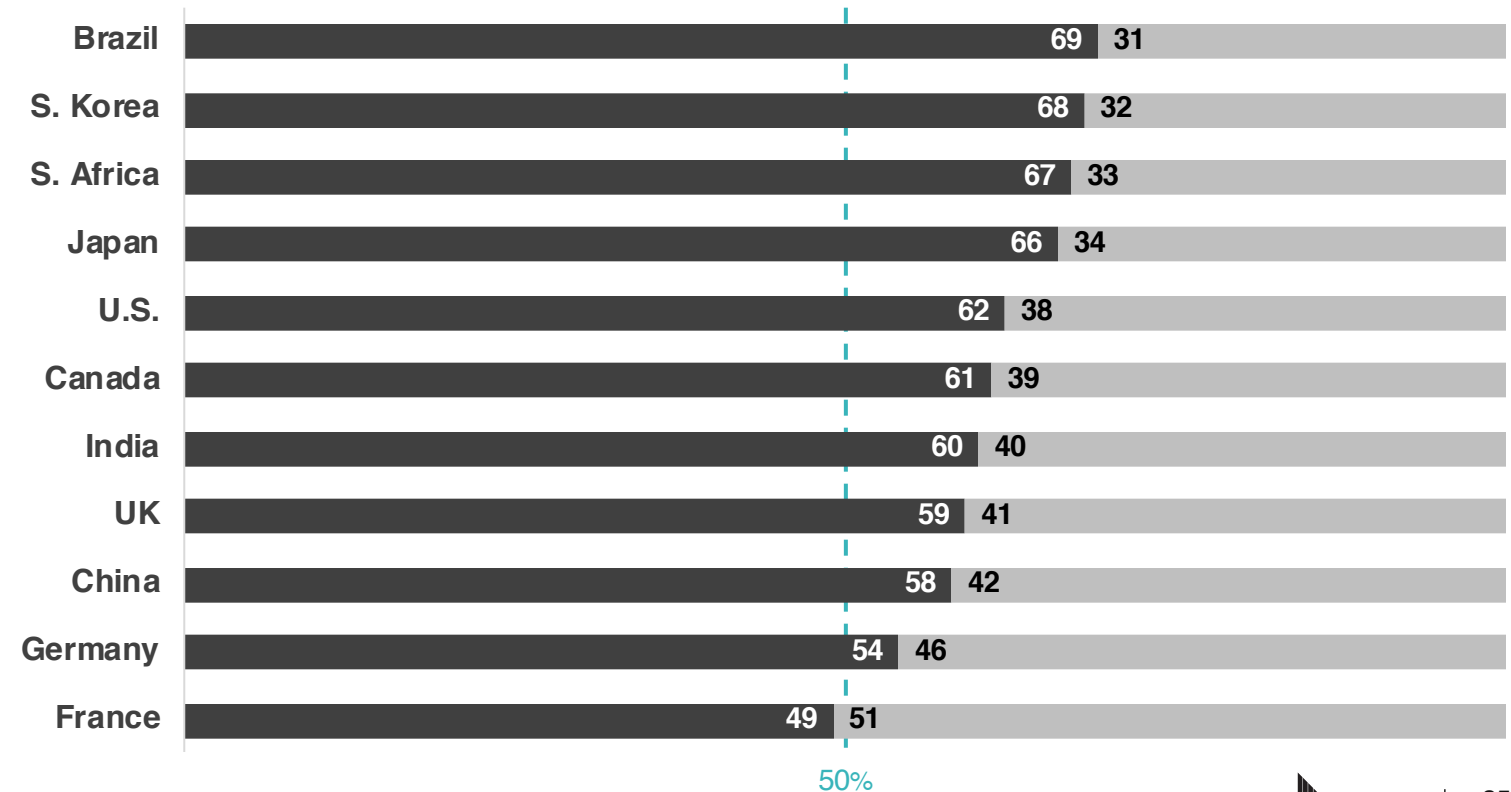
61%

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

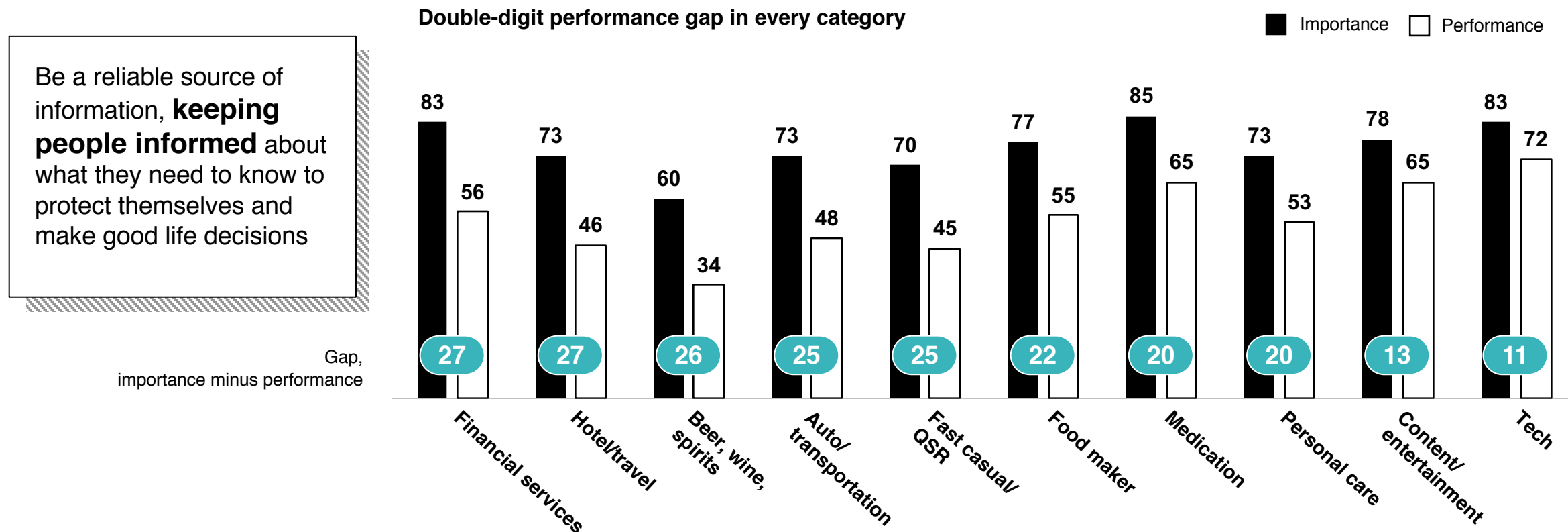
39%

Global 11



# 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, in S. Africa



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, S. Africa, 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

S. Africa  
— 65%

Canada	63
U.S.	63
UK	57
France	54
Germany	53

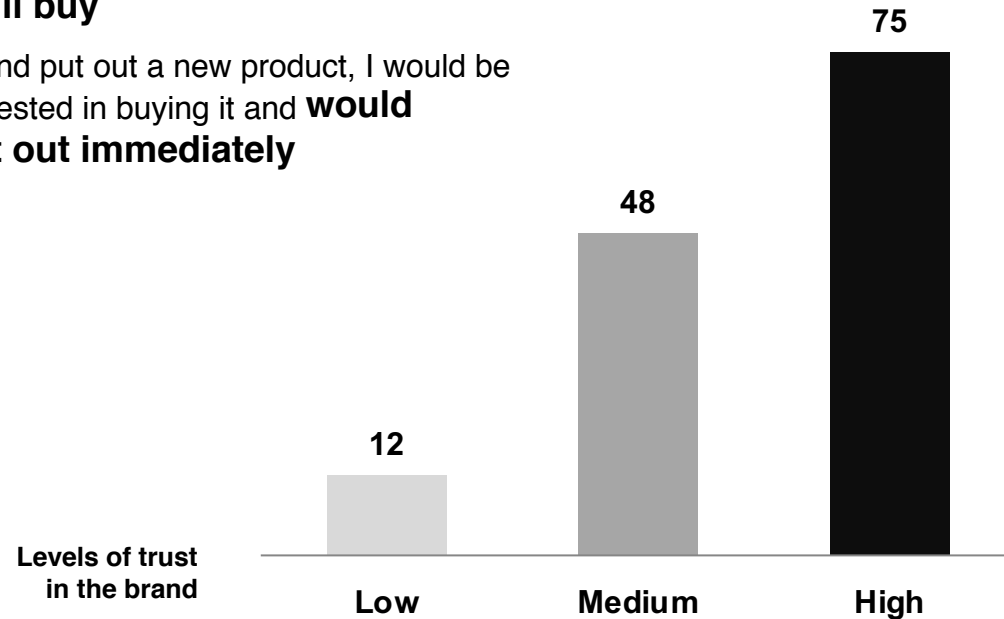
# TRUST DEFINES BRANDS



# 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



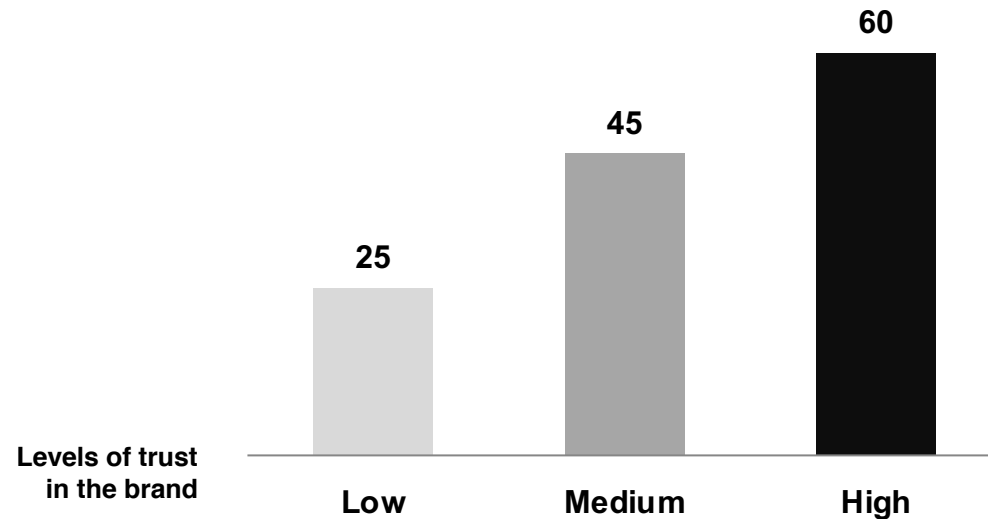
**2020 Edelman Trust Barometer Special Report: Brand Trust.** TRU\_KPI. Continuing to think about the same brand, which of the following statements accurately describe how you feel about that brand? Pick all that apply. “Loyalty” is a net of attributes 1-3. General population, 11-mkt avg, by low trusters, 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



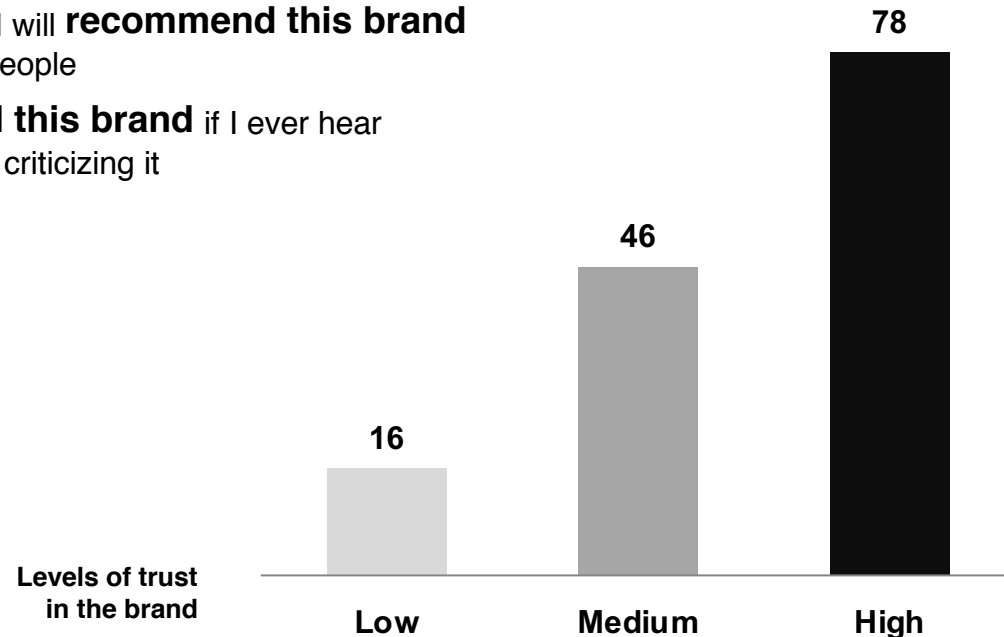
Jenny Yang poses for the #TakeOutHate campaign  
Photo: Ajinomoto

**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**

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

Creating a **Respectful** and **Open** World for **Natural** Hair.

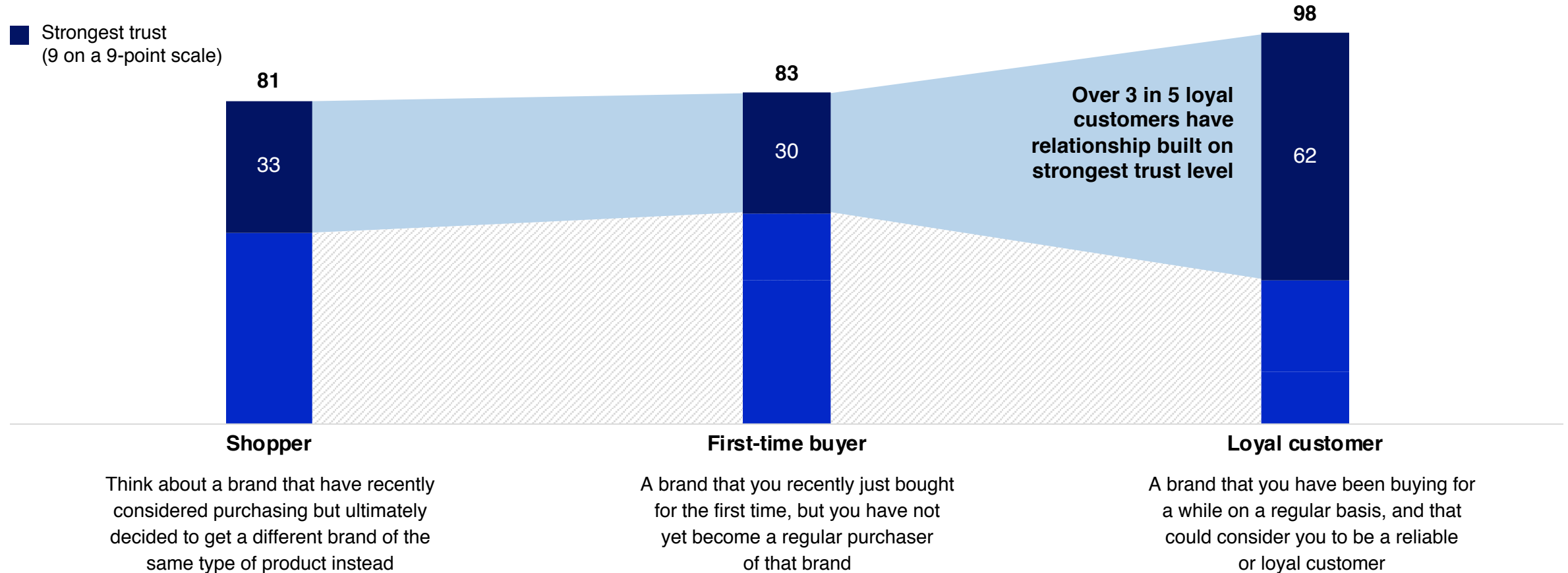
**Sign The CROWN Act petition today!**  
[TheCROWNAct.com](https://TheCROWNAct.com)

**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.



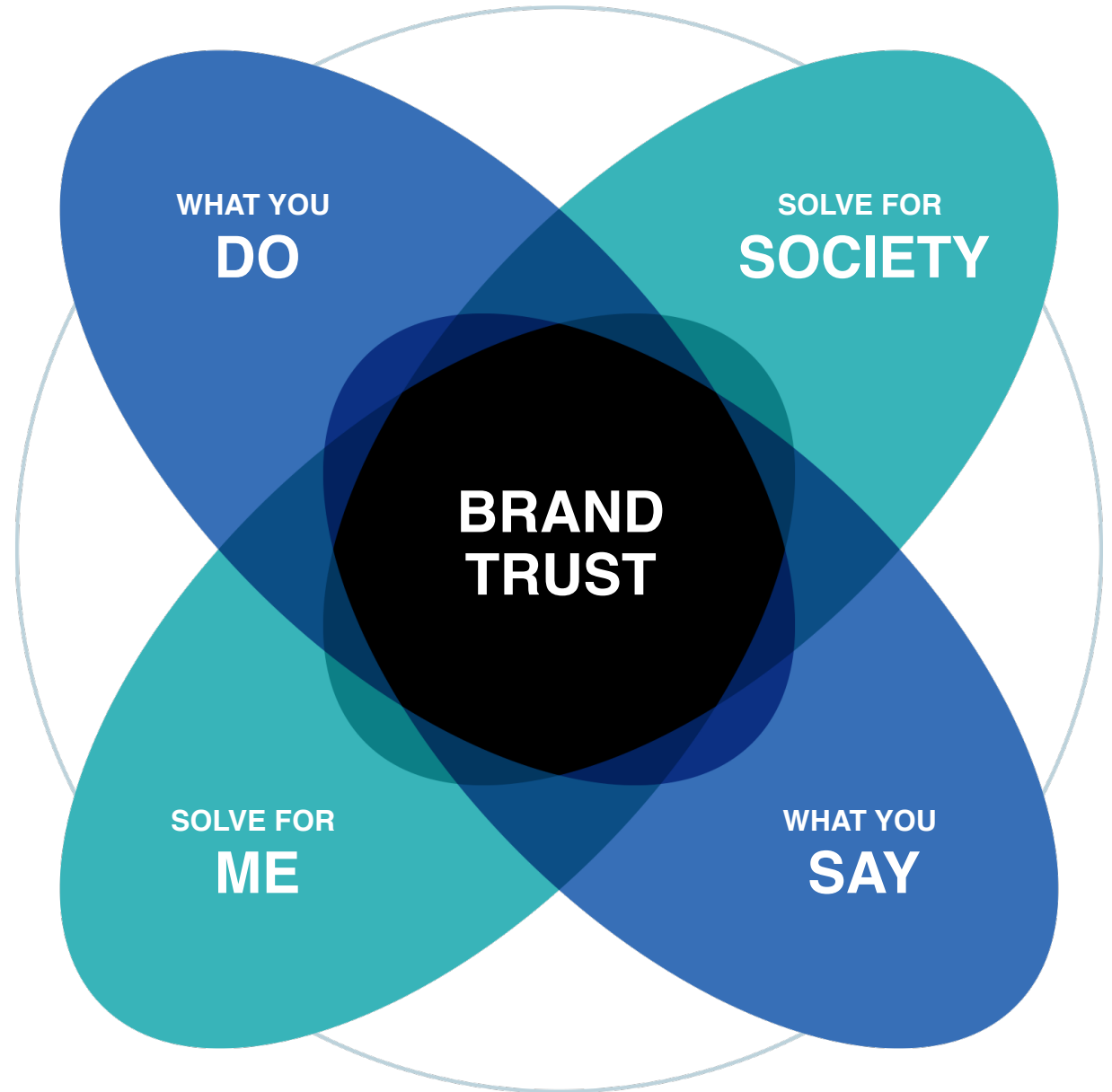
# TRUST UNLOCKS DEEPER, MORE RESILIENT RELATIONSHIPS

Percent trust, in S. Africa



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, S. Africa, 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)

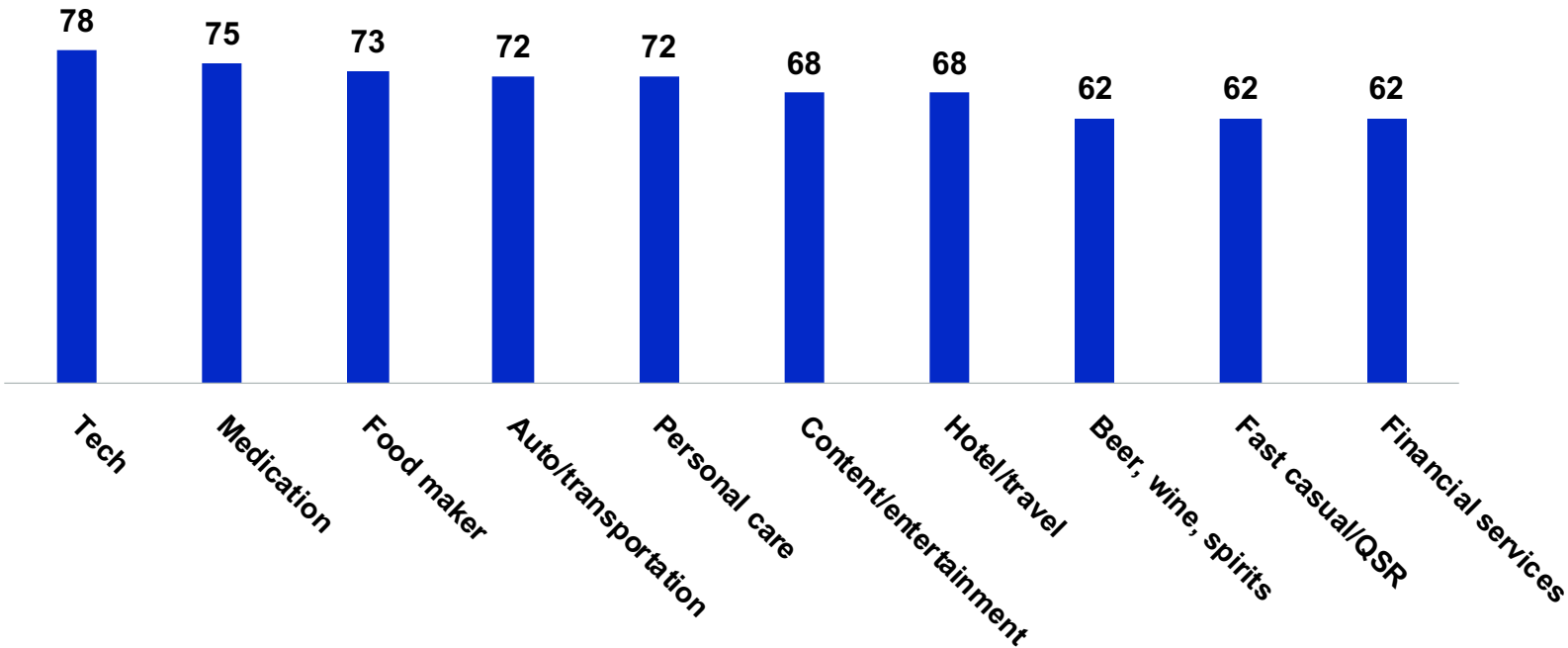


# BRANDS ON THE FRONTLINE MOST TRUSTED

Percent trust, in S. Africa



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.
<b>Brands in general</b>	<b>70</b>	<b>67</b>	<b>73</b>	<b>89</b>	<b>63</b>	<b>61</b>	<b>83</b>	<b>58</b>	<b>73</b>	<b>74</b>	<b>65</b>	<b>69</b>
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

# BRAND TRUST ACROSS DEMOGRAPHICS

Percent trust, in S. Africa

	S. Africa	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
<b>Brands in general</b>	<b>73</b>	<b>72</b>	<b>75</b>	<b>71</b>	<b>74</b>	<b>72</b>	<b>71</b>	<b>75</b>	<b>74</b>
Tech	78	78	80	76	80	76	75	79	82
Food maker	73	73	75	67	74	72	71	72	78
Medication	75	74	77	74	73	77	71	77	78
Auto/transportation	72	73	73	71	74	71	67	75	76
Hotel/travel	68	70	66	64	67	68	63	68	75
Personal care	72	72	75	66	68	76	70	74	73
Beer, wine, spirits	62	64	65	53	65	59	53	64	74
Financial services	62	61	63	63	62	62	58	63	68
Content/entertainment	68	73	69	52	68	68	66	68	72
Fast casual/QSR	62	65	62	56	65	60	62	62	67



# 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.
<b>PERSONAL VULNERABILITY NET</b>	<b>81</b>	<b>82</b>	<b>82</b>	<b>91</b>	<b>68</b>	<b>70</b>	<b>91</b>	<b>73</b>	<b>88</b>	<b>75</b>	<b>83</b>	<b>81</b>
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
<b>SOCIETAL IMPACT NET</b>	<b>74</b>	<b>81</b>	<b>75</b>	<b>80</b>	<b>73</b>	<b>74</b>	<b>79</b>	<b>62</b>	<b>73</b>	<b>63</b>	<b>74</b>	<b>68</b>
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, in S. Africa

	S. Africa	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
<b>PERSONAL VULNERABILITY NET</b>	<b>88</b>	<b>87</b>	<b>88</b>	<b>87</b>	<b>86</b>	<b>89</b>	<b>86</b>	<b>89</b>	<b>88</b>
The COVID-19 pandemic has greatly increased my reliance on brands to keep me and the people in my community safe from the virus	43	42	45	39	42	43	40	44	44
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	38	39	42	28	37	40	38	39	40
Brands are collecting an ever-increasing amount of my personal information in their databases	22	23	22	19	24	21	18	23	28
I am relying more on brands to take care of important things in my life that I used to do myself	28	29	31	19	28	29	31	27	30
I have recently begun struggling financially and cannot afford to waste money on a bad purchase	45	38	49	60	40	49	46	48	37
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.	21	26	18	13	24	19	22	21	23
<b>SOCIETAL IMPACT NET</b>	<b>73</b>	<b>75</b>	<b>71</b>	<b>75</b>	<b>74</b>	<b>73</b>	<b>68</b>	<b>76</b>	<b>75</b>
How brands produce and deliver their products is having an increasingly large impact on the environment	47	41	50	58	43	50	39	49	51
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	39	38	37	44	39	38	32	40	45
Brands are getting more involved than ever before in addressing major social issues and societal problems	34	36	34	30	34	34	28	37	40
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	29	31	27	26	30	29	28	30	27

**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, S. Africa, 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, in S. Africa

	S. Africa	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
Protector	75	77	77	68	73	78	75	75	75
Provider	82	82	83	82	81	83	78	84	86
Information	78	80	77	72	76	79	77	78	77
Innovator	77	78	79	70	77	77	77	76	78
Educator	72	75	74	62	70	74	75	73	69
Calming voice	64	69	64	53	62	66	67	64	62
Entertainment	51	58	50	32	54	48	53	49	51
Source of joy	70	72	70	63	71	69	74	68	68
Connector	62	66	65	46	62	62	70	60	59
Inspiration	67	71	69	53	67	67	73	64	67
Self-expression	60	68	60	40	61	59	67	57	59
Safety net	68	71	70	56	67	68	68	67	69
Collaborator	62	66	64	47	62	61	65	61	63
Problem solver	74	76	74	67	74	74	72	74	75
Shape culture	72	76	72	57	71	72	74	71	71
Visionary	75	77	74	71	74	76	75	76	74





# 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, in S. Africa

	Tech	Food maker	Medication	Auto/ transportation	Hotel/ travel	Personal care	Beer, wine, spirits	Financial services	Content/ entertainment	Fast casual/ QSR
Protector	80	81	77	81	76	71	58	82	72	70
Provider	83	86	83	79	79	79	57	85	78	78
Information	83	77	85	73	73	73	60	83	78	70
Innovator	82	72	77	76	68	72	52	80	69	71
Educator	78	70	73	69	64	69	58	80	73	64
Calming voice	64	64	72	57	65	61	51	68	66	62
Entertainment	66	50	43	48	70	50	52	41	72	63
Source of joy	70	67	54	61	72	66	57	59	73	68
Connector	69	61	56	59	65	58	54	60	67	62
Inspiration	65	63	59	56	58	68	50	63	63	58
Self-expression	61	52	52	55	56	64	47	52	57	55
Safety net	68	73	74	69	62	61	51	75	65	64
Collaborator	66	69	68	65	55	58	55	69	58	64
Problem solver	79	73	75	75	67	67	52	83	67	65
Shape culture	70	68	63	68	65	63	57	68	73	67
Visionary	80	75	73	76	69	71	53	79	73	67

# 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, in S. Africa

	S. Africa	18-34	35-54	55+	Male	Female	Bottom 25%	Middle 50%	Top 25%
Industry expert	68	69	69	65	69	67	62	69	77
A person like yourself	67	70	67	60	66	68	67	67	70
Brand technical expert	56	59	56	51	58	54	59	55	55
Founder	57	60	56	53	58	56	61	57	55
Brand employee	50	56	49	37	50	50	52	50	47
Celebrity that shares my hardships	55	61	51	47	54	56	60	56	47
Community hero	49	58	46	30	50	47	52	49	46
Brand CEO	45	52	43	32	48	43	54	43	39
Influencer with small following	47	55	41	35	47	46	46	48	46
Influencer with millions of followers	38	47	33	25	42	35	43	39	31
Celebrity	29	40	25	11	33	26	36	29	22





# 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

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



# WHAT BRANDS MUST DO: FULL QUESTION TEXT

Shortened Text	Full Text
Protector	Be a <b>protector</b> , doing everything it can to ensure the safety and wellbeing of its employees, customers, and communities
Provider	Be a <b>dependable provider</b> , ensuring that people have easy and affordable access to the products and services they need
Information	Be a <b>reliable source of information</b> , keeping people informed about what they need to know to protect themselves and make good life decisions
Innovator	Be an <b>innovator</b> , developing new products and services to help people meet the daily challenges of life
Educator	Be an <b>educator</b> , 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 <b>calming voice</b> , helping to relieve people's anxieties
Entertainment	Be a <b>source of entertainment</b> , escapism, and distraction from people's problems and concerns
Source of joy	Be a <b>source of joy</b> in people's lives
Connector	Be a <b>connector</b> , 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 <b>personal inspiration</b> , helping people to see themselves in a more positive way and to become a better version of themselves
Self-expression	Be a means of <b>self-expression</b> , 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 <b>safety net</b> , stepping in to fill gaps in the government's response to a crisis or in meeting the needs of underserved populations
Collaborator	Be a <b>collaborator</b> , 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 <b>problem solver</b> , developing new solutions to our country's problems
Shape culture	Be a <b>positive force in shaping our culture</b> 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 <b>visionary</b> , 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
<b>Loyalty (net)</b>	<b>12</b>	<b>48</b>	<b>75</b>
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
<b>Engagement (net)</b>	<b>25</b>	<b>45</b>	<b>60</b>
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
<b>Advocacy (net)</b>	<b>16</b>	<b>46</b>	<b>78</b>
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

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