

Special Report:
Workplace Trust and
the Coronavirus



Edelman Trust
Barometer 2020



A NEED FOR BUSINESS AND EMPLOYERS TO STEP UP

Percent who say

78%

Businesses have a responsibility to **ensure their employees are protected** from the virus in the workplace *and* do not spread the virus into the community

63%

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

2020 Edelman Trust Barometer Special Report: Trust and the Coronavirus. Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Data shown is a net of r5 and r6. Question shown to those who have heard of the virus (Q1/1). Q10. How often would you like to be updated on the information you just indicated your employer should be sharing? Question shown to those who are aware of the virus and are employees and listed information their employer should be sharing (Q1/1 AND Q43/1 AND Q9/1-14,16). 10-mkt avg. Data collected between March 6 and March 10, 2020.

2020 Edelman Trust Barometer Special Report: Brands and the Coronavirus. Q2. Please indicate how much you agree or disagree with the following statements about brands and how they are responding to the current coronavirus pandemic. 9-point scale; top 4 box, agree. Question shown to those who have heard of the virus (Q1/1). 12-mkt avg. Data collected between March 23 and March 26, 2020.

BRANDS CRITICAL TO WINNING THE FIGHT

Percent who say

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

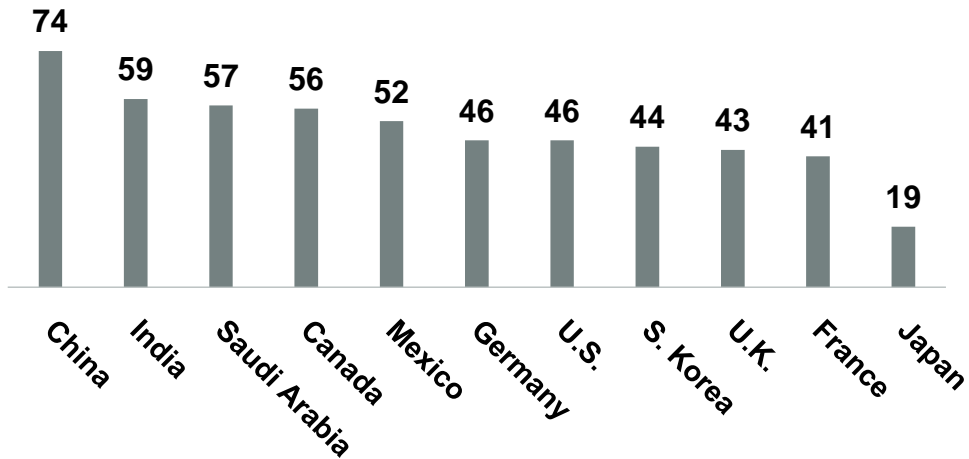
↓
62%

BUSINESS NOT KEEPING US SAFE

Business Performance
Implementing safety measures to **protect workers and customers**

Global 11

49% doing well or very well



CEOS FAILING TO DEMONSTRATE PUBLIC LEADERSHIP

Percent who say

CEOs are doing **an outstanding job** meeting the demands placed on them by the pandemic

29%

2020 Edelman Trust Barometer Spring Update. NEW_PER_NATGOV. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe the national government of your country is currently doing each of the following? 5-point scale; top 2 box, doing well. General population, 10-mkt avg (excluding China). NEW_PER_BUS. When it comes to how it has performed thus far during the COVID-19 pandemic, how well do you believe business in general is currently doing each of the following? 5-point scale; top 2 box, doing well. General population, 11-mkt avg. *Data on left excludes China from the results because we did not ask questions to respondents that were sensitive in nature. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, agree. CRISIS_LEAD. The current pandemic places many demands on our leaders. Which of the leaders listed below do you believe are doing an outstanding job meeting the demands being placed upon them by this crisis? Pick all that apply. General population, 11-mkt avg. "All of the above" responses were added to each item.

A RE-ORDERING OF TRUST: GOVERNMENT NOW MOST TRUSTED

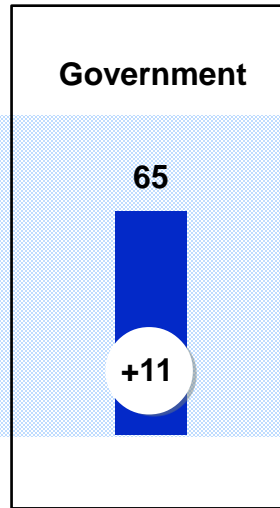


Percent trust



**May 2020
Spring Update**

Only media not trusted
Government most trusted



NGOs



Business



Media



**January 2020
Trust Barometer**

No institutions trusted
NGOs and business most trusted

NGOs



Business



Government



Media



2020 Edelman Trust Barometer Spring Update. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

Workplace Trust and the Coronavirus

7-market online survey

- **U.S., U.K., France, Germany, India, South Korea and Singapore**
- All data is nationally representative based on age, region and gender
- 3,400+ respondents (1,000 U.S.; 500 U.K., France, Germany and India; 200 South Korea and Singapore)

Timing of Fieldwork: August 23 - August 26, 2020.

Margin of error

- 7-market global data margin of error: +/- 1.67% (N=3,449)
- Market-specific data margin of error: U.S. +/- 3.08% (N=1,010); U.K. +/- 4.35% (N=508); France +/- 4.37% (N=502), Germany +/- 4.36% (N=504); India +/- 4.34% (N=509), South Korea and Singapore. +/- 6.80% (N=208, each)

⊥

UNCERTAINTY AND FEAR ABOUT RETURNING TO NORMAL LIFE

⊥

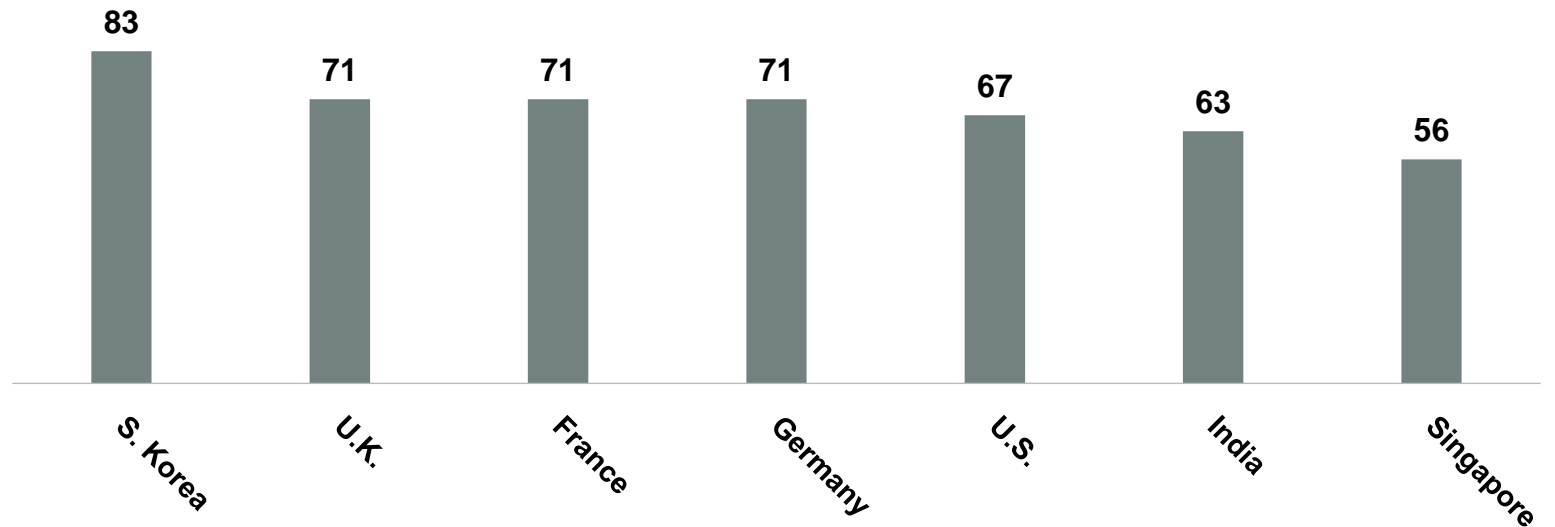
SECOND WAVE EXPECTATIONS ARE HIGH

Percent who say yes

There will be a **second wave** of the coronavirus in my country

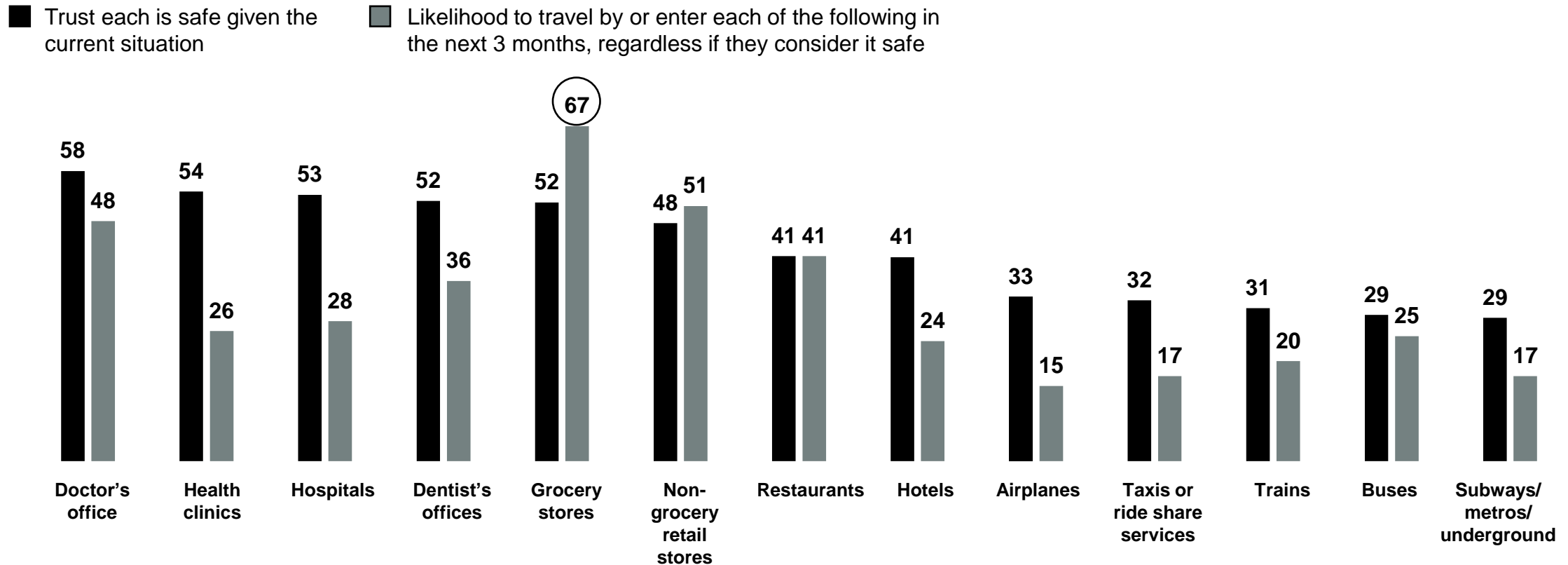
68%

Global 7



PEOPLE ARE STILL SCARED AND DO NOT TRUST THAT IT'S TIME TO RESUME NORMAL ACTIVITIES

Percent who trust each is safe given the current situation



2020 Edelman Trust Barometer Special Report: Workplace Trust and the Coronavirus. Q3. Please indicate how much you trust that each of the following are safe right now given the current situation with the coronavirus in your country. Use a nine-point scale where one means that you "do not trust they are safe at all" and nine means that you "completely trust they are safe". Please select one response for each. 9-point scale; top 4 box, trust. / Q4. Regardless of how safe you feel each of the following are, which of these would you be likely to do in the next 3 months? Please select all that apply. 7-mkt avg. Data collected between August 23 and August 26, 2020.

GLOBALLY, PEOPLE ARE SELF CONFINING TO THEIR IMMEDIATE SURROUNDINGS

Percent who are likely to do the following in the next 3 months, regardless if they consider it safe

	Global 7	U.S.	U.K.	France	Germany	India	S. Korea	Singapore
Travel on a bus	25	11	26	24	30	25	50	57
Stay in a hotel	24	27	31	27	20	21	20	15
Travel on a train	20	7	27	24	24	20	24	44
Take a taxi or ride share service	17	10	17	8	8	31	32	38
Travel on a subway / metro / underground	17	7	13	18	18	16	37	43
Travel on an airplane	15	16	13	13	8	25	12	11

⌊

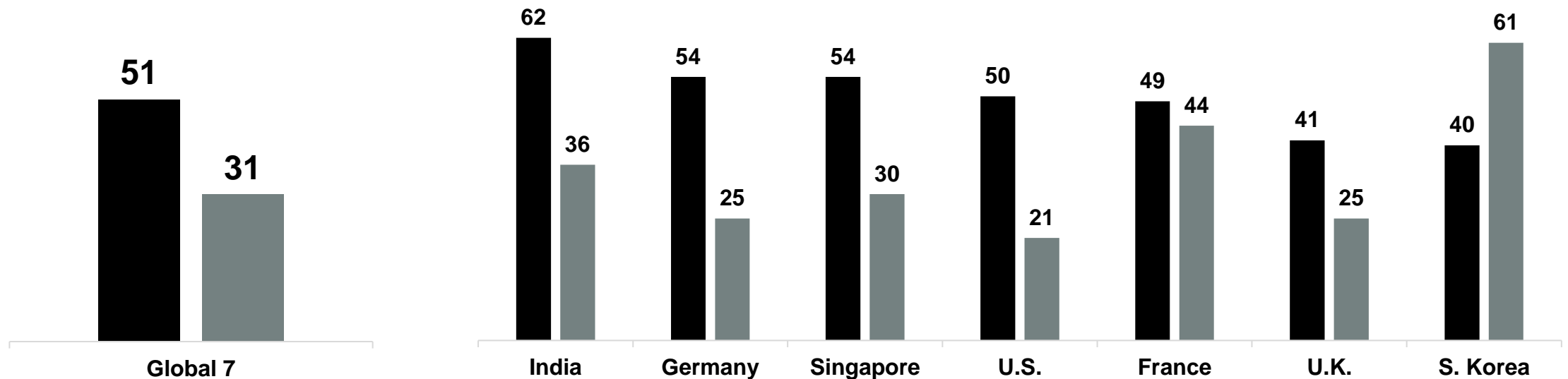
RETURNING TO THE WORKPLACE

⌋

ONLY HALF OF EMPLOYEES DEEM OFFICE SPACES SAFE

Percent of employees that...

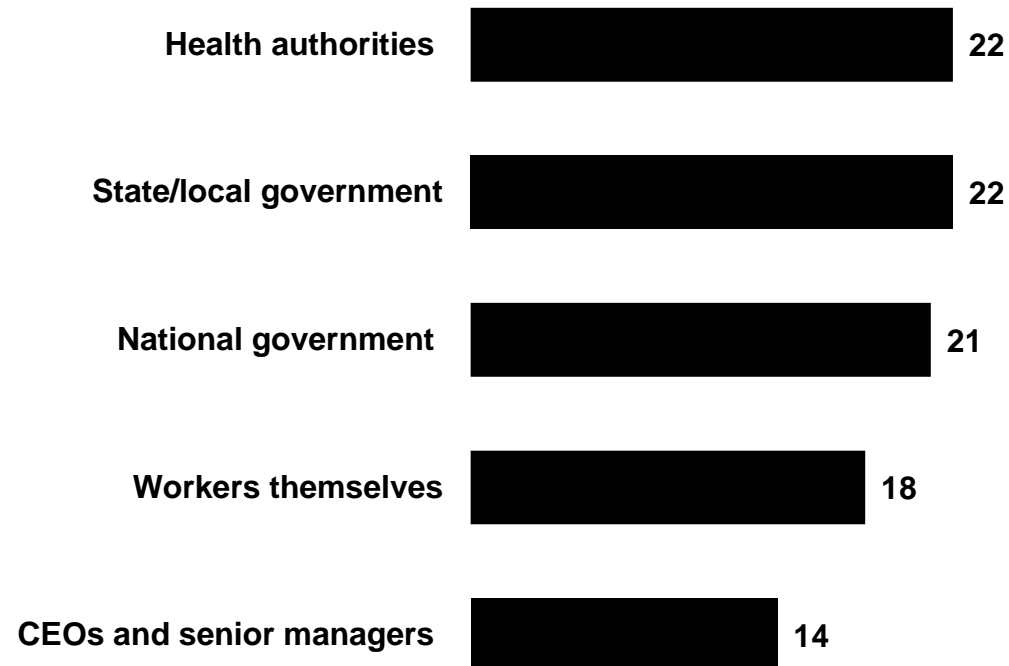
- Trust corporate offices are safe given the current situation
- Are likely to enter a corporate office in the next three months



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THERE IS NO CONSENSUS ON THE AUTHORITY FOR RETURN TO WORKPLACE DECISIONS

Percent of employees who say each should lead in making the return to work decision



MULTIPLE PRECAUTIONS ARE NEEDED FOR EMPLOYEES TO FEEL PROTECTED

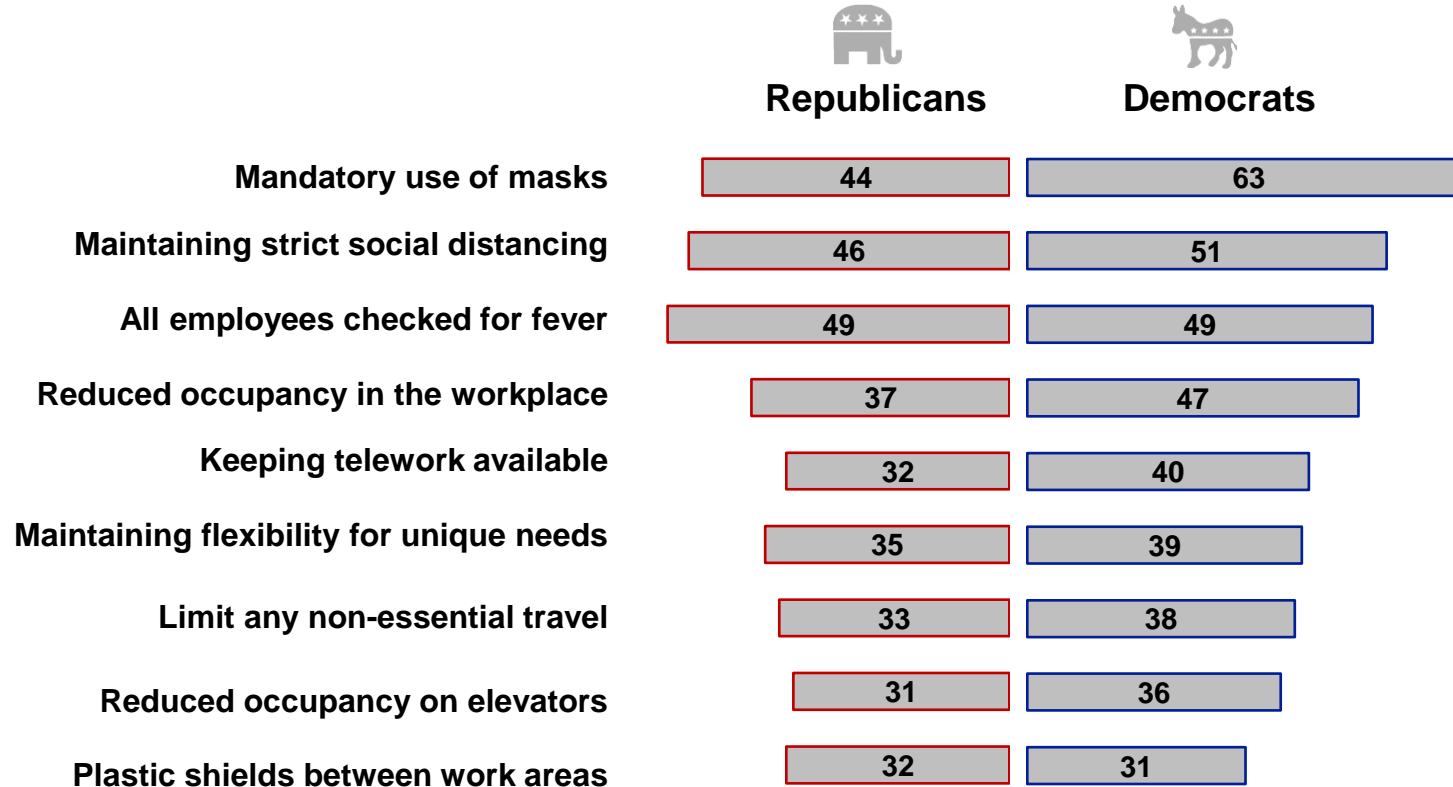
Percent of employees who feel each action is required to ensure the workplace is safe in terms of preventing the spread of the coronavirus

	Global 7	U.S.	U.K.	France	Germany	India	S. Korea	Singapore
Mandatory use of masks	59	53	43	65	50	71	80	72
Maintaining strict social distancing	57	47	57	56	51	69	65	67
Reduced occupancy in the workplace	45	42	51	42	41	53	33	53
All employees checked for fever	44	46	44	27	16	64	58	63
Limit any non-essential travel	40	33	36	44	37	48	51	45
Keeping telework available as an option	37	36	28	42	29	48	35	47
Maintaining flexibility for those with unique needs	35	35	43	21	29	48	29	41
Reduced occupancy on elevators	35	32	32	27	34	48	26	46
Plastic shields between work areas	34	30	46	28	27	49	24	29
Nothing will make my workplace safe	2	3	1	2	4	-	6	2
Average number of precautionary requirements employees want to see happen:	3.9	3.6	3.8	3.5	3.2	5.0	4.0	4.6



IN THE U.S., WORKPLACE SAFETY PRECAUTIONS ARE POLITICIZED

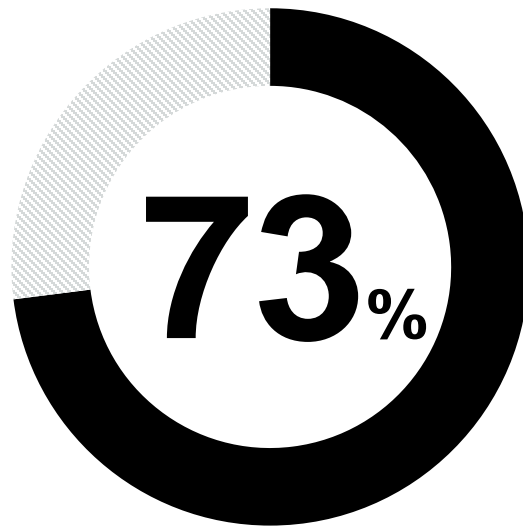
Percent of Democrat and Republican voters saying each precaution should be taken



FOR NOW, EMPLOYEES FEEL CONFIDENT IN THEIR VIRTUAL WORKPLACE OPTIONS

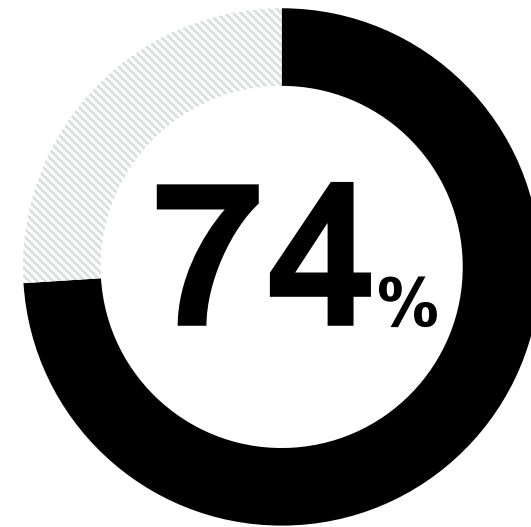
Percent of employees working from home who agree

I have the option to work remotely for the **foreseeable future**



Global 7

I trust that continuing to work remotely **will not hurt my career**



Global 7

80% higher income earners

EMPLOYERS MUST CONTINUE TO COMMUNICATE AND SET EXPECTATIONS

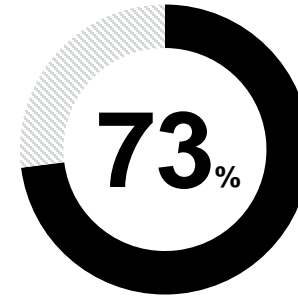
Percent of employees working from home who agree

My employer has effectively **communicated how we are approaching our return to the workplace**

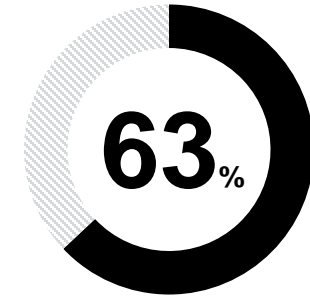
⊥
70%

Global 7

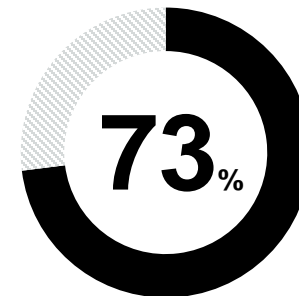
Multinational Organizations



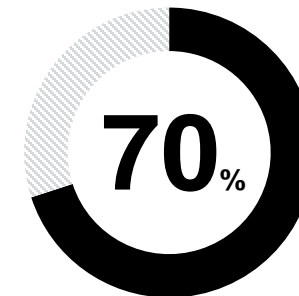
Domestic Organizations



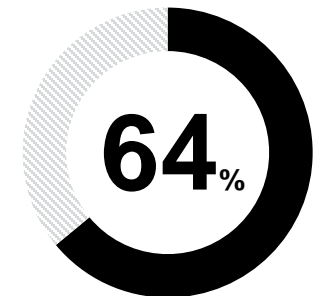
Upper-Level Management



Mid-Level Management



Non Management



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INFORMATION GATHERING

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MAJOR NEWS ORGANIZATIONS ARE THE MAIN SOURCES OF INFORMATION

Percent who are getting most of their information about the virus from each source

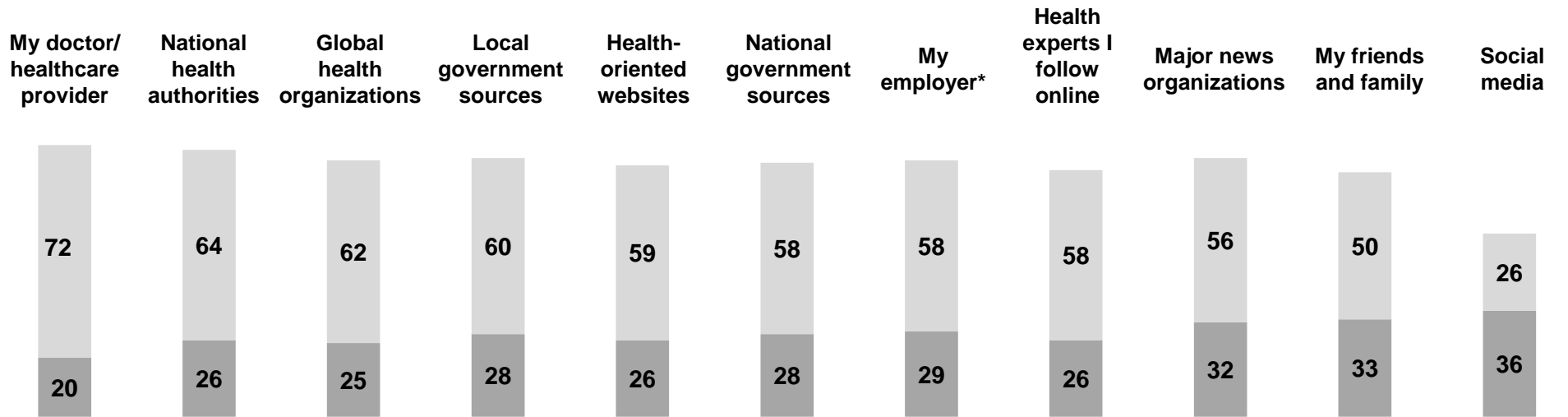
	Global 7	U.S.	U.K.	France	Germany	India	S. Korea	Singapore
Major news organizations	54	49	60	43	58	58	73	52
National government sources	40	22	46	42	40	56	43	54
National health authorities in your country	36	25	33	45	31	54	27	49
Social media	35	26	23	20	30	69	40	52
Local government sources	32	28	25	23	26	52	27	64
My friends and family	31	24	19	31	26	53	33	38
Global health organizations like the WHO	28	20	22	26	22	57	17	42
My doctor or healthcare provider	21	19	10	33	15	34	12	16

YET HEALTH EXPERTS ARE TRUSTED MORE READILY

Percent who report they believe coronavirus information from each source

Number of times they need to see the information repeated before believing it is true:

- Once or twice
- Three or more times



I will never believe it is true if this is the only place I see or hear it

8	10	13	12	14	14	13	16	13	17	37
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2020 Edelman Trust Barometer Special Report: Workplace Trust and the Coronavirus. Q2. When you see or hear a new piece of information about the coronavirus from each of the following, how many times do you need to see it or hear it repeated before you believe it is really true? Please select one response for each “Once or twice” is a sum of codes 1 and 2. “Three or more” is a sum of codes 3, 4 and 5. “My employer” was only asked of those who are employees. 7-mkt avg. Data collected between August 23 and August 26, 2020.

SOCIAL MEDIA IS DISTRUSTED MOST

Percent who report they **will never believe** information about the coronavirus from each source if this is the only place they see or hear it

		Global 7						
		U.S.	U.K.	France	Germany	India	S. Korea	Singapore
Social media	37	46	54	47	38	11	17	28
My friends and family	17	22	22	15	17	7	6	19
Health experts I follow online	16	20	22	16	18	5	10	14
Health-oriented websites	14	15	17	28	15	4	7	10
National government sources	14	24	12	13	15	3	5	5
Global health organizations like the WHO	13	20	13	11	16	4	9	6
Major news organizations	13	17	16	15	14	4	3	8
My employer*	13	17	14	14	11	8	13	13
Local government sources	12	18	14	13	14	4	5	5
National health authorities in your country	10	15	8	10	14	3	4	4
My doctor or healthcare provider	8	11	8	5	10	4	3	8

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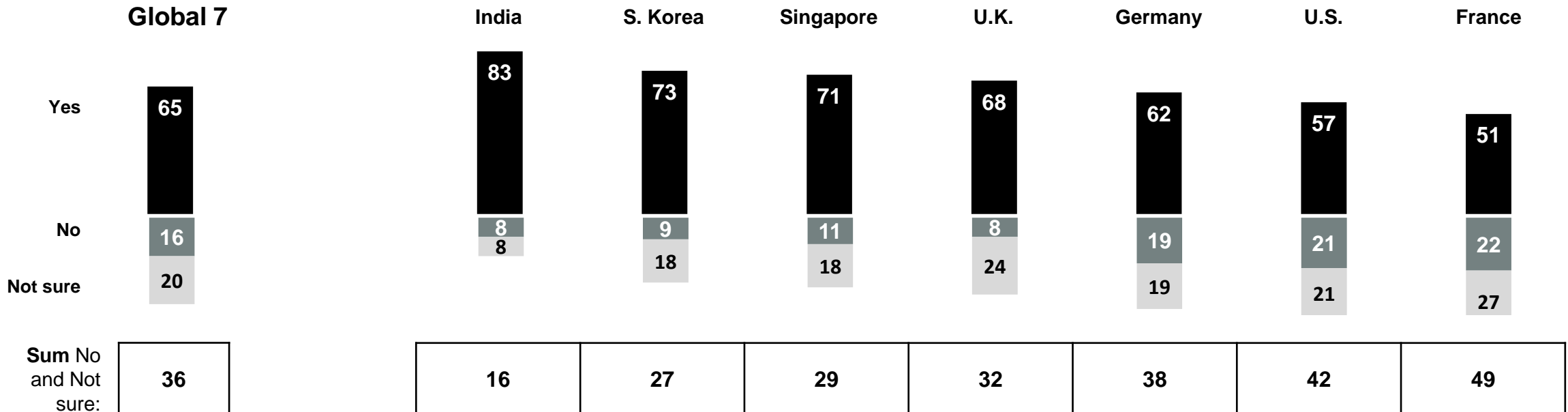
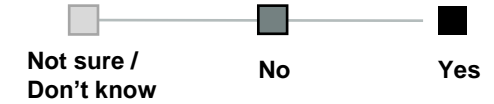
VACCINE RECEPTIVITY

T

VACCINE RECEPTIVITY IS MIXED

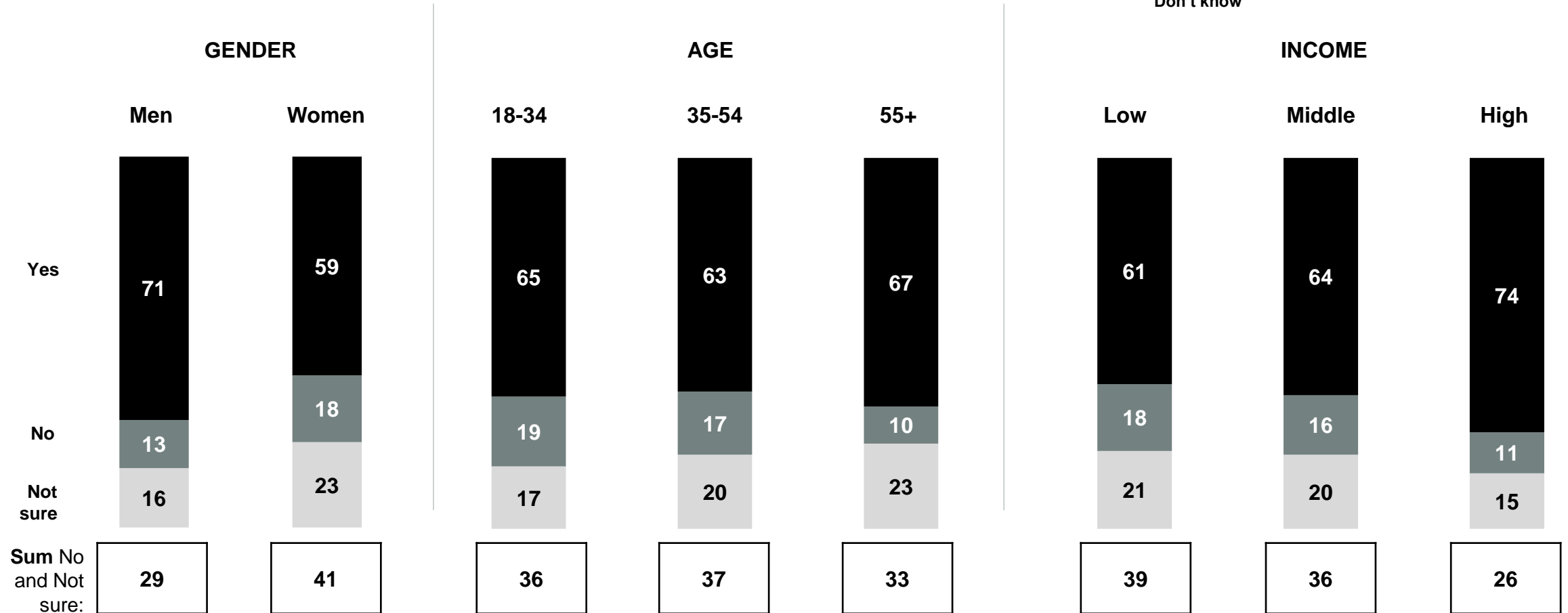
Percent who say yes, no or not sure

Would you **take a government approved, no cost vaccine** if it were available?



WOMEN AND LOWER INCOME HOUSEHOLDS, GLOBALLY, ARE MOST HESITANT

Percent who say yes, no or not sure

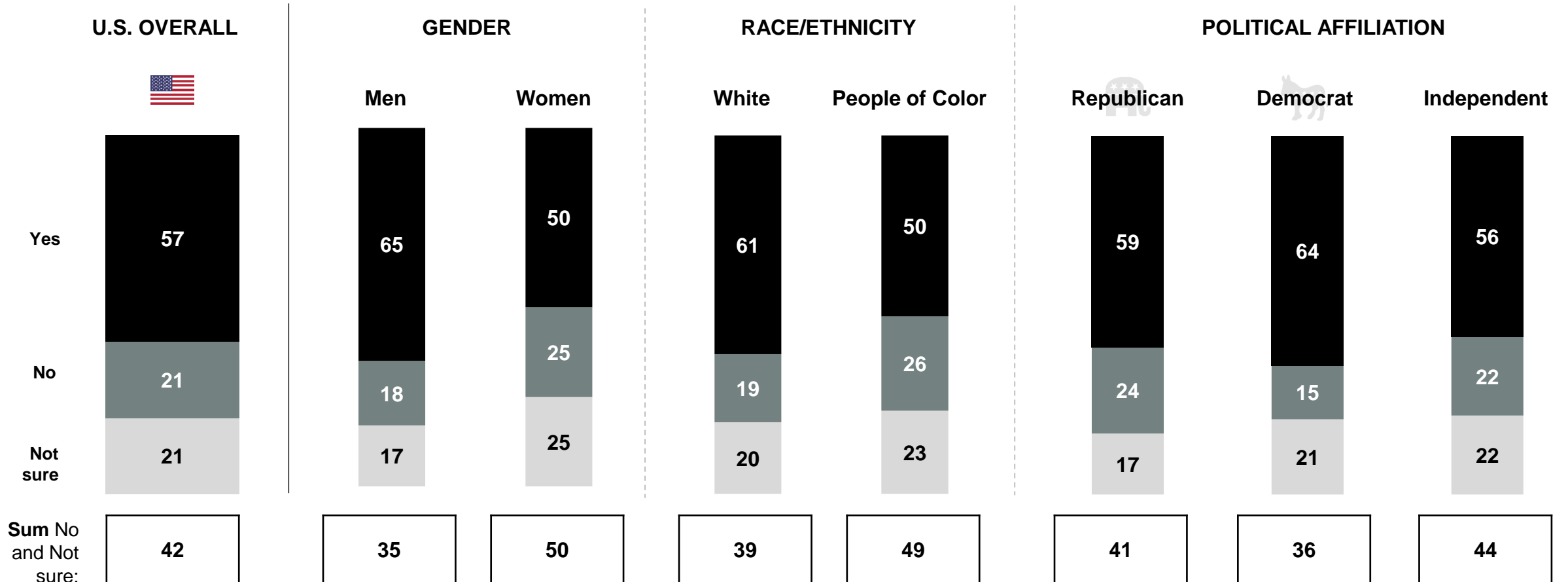
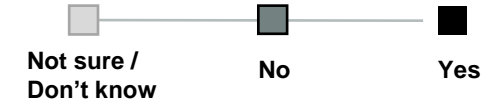


2020 Edelman Trust Barometer Special Report: Workplace Trust and the Coronavirus. Q11. Would you take a government approved, no cost vaccine if it were available? (Please select one response.) 7-mkt avg. Data collected between August 23 and August 26, 2020.



IN THE U.S., WOMEN, PEOPLE OF COLOR, AND REPUBLICANS/INDEPENDENTS ARE UNCERTAIN

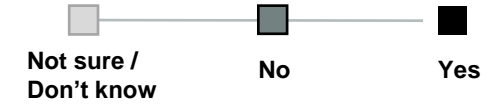
Percent who say yes, no or not sure



2020 Edelman Trust Barometer Special Report: Workplace Trust and the Coronavirus. Q11. Would you take a government approved, no cost vaccine if it were available? (Please select one response.) U.S. Data collected between August 23 and August 26, 2020.

VACCINE RECEPTIVITY REQUIRES TRUST IN AN INFLUENTIAL SOURCE

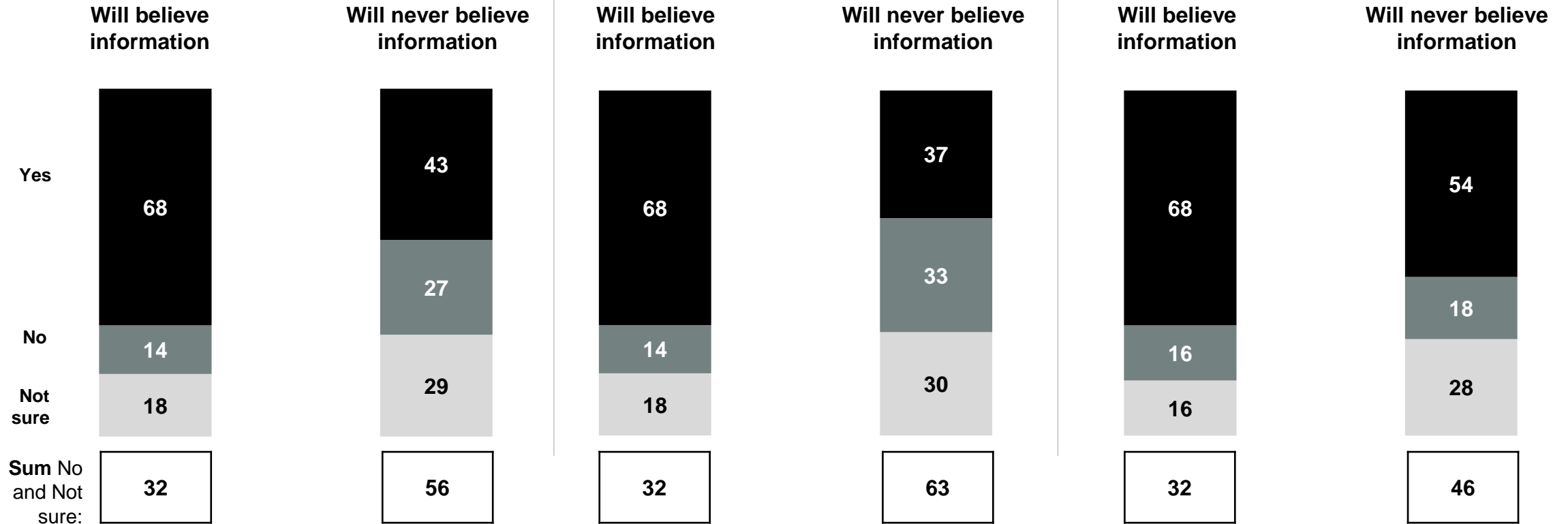
Percent who say yes, no or not sure



GOVERNMENTS

HEALTH AUTHORITIES

EMPLOYERS



2020 Edelman Trust Barometer Special Report: Workplace Trust and the Coronavirus. Q11. Would you take a government approved, no cost vaccine if it were available? (Please select one response.) "Governments" refers to National Governments. "Will believe information" audience derived from sum of codes 1-5 from Q2. 7-mkt avg. Data collected between August 23 and August 26, 2020.

BUILDING TRUST DURING THE CORONAVIRUS

1.

Uncertainty and fear about COVID is creating “stay put” mindset globally

2.

There is a trust issue on return to the workplace – employees want multiple safety precautions and consistent communications

3.

An information mismatch exists between where people get information and trusted sources on the virus

4.

Strong science *and* trustworthy communications are required to build openness to a vaccine

FIVE TANGIBLE STEPS FOR BUSINESS TO RETURN TO THE WORKPLACE

1.

Partner with local officials to remove obstacles to confidently returning to work, including safer commuting options and more flexibility in the workday

2.

Disseminate high-quality, reliable information from expert sources and insist on wearing a mask and physically distancing

3.

Use data, insist on contact tracing and testing, even of asymptomatic people, and be as transparent as possible when an employee falls ill

4.

As business performance rebounds, reward and recognize employees

5.

Create a new position of Chief Public Health Officer aimed at the intersection of community wellness and business priorities