



2018 Edelman Trust Barometer

Canada

www.edelman.ca/trust
#TrustBarometer



2018 Edelman Trust Barometer

Methodology

Online Survey in 28 Markets

18 years of data

33,000+ respondents total

1,500 Canadian respondents

All fieldwork was conducted between
October 28 and November 20, 2017

28-country global data margin of error: General population +/- 0.6% (N=32,200), informed public +/- 1.2% (N=6,200), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8 (N=16,100).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N = min 200, varies by market), China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N =min 740, varies by market).

General Online Population

17 years in 25+ markets

Ages 18+

1,500 Canadian respondents

All slides show general online
population data unless otherwise noted

Informed Public

10 years in 20+ markets

Represents 15% of total global
population

500 respondents in U.S. and China;
200 in all other markets

Must meet 4 criteria:

Ages 25-64

College educated

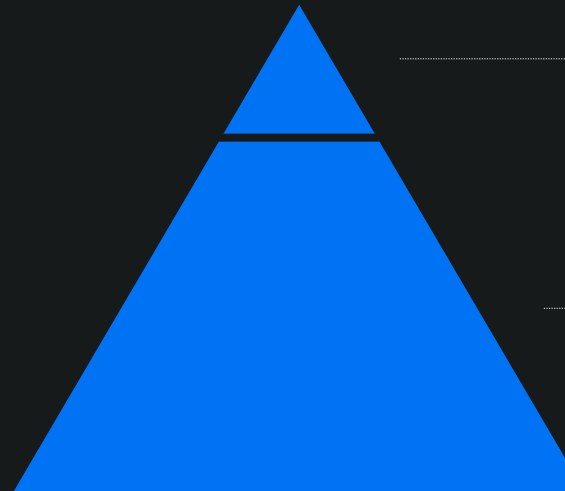
In top 25% of household income per
age group in each market

Report significant media consumption
and engagement in business news

Mass Population

All population not including informed public

Represents 85% of total global population



Trust in Retrospect

2001

Rising Influence of NGOs

2002

Fall of the Celebrity CEO

2003

Earned Media More Credible Than Advertising

2004

U.S. Companies in Europe Suffer Trust Discount

2005

Trust Shifts from "Authorities" to Peers

2006

"A Person Like Me" Emerges as Credible Spokesperson

2007

Business More Trusted Than Government and Media

2008

Young Influencers Have More Trust in Business

2009

Business Must Partner with Government to Regain Trust

2010

Trust is Now an Essential Line of Business

2011

Rise of Authority Figures

2012

Fall of Government

2013

Crisis of Leadership

2014

Business to Lead the Debate for Change

2015

Trust is Essential to Innovation

2016

Growing Inequality of Trust

2017

Trust in Crisis

2018

The Battle for Truth



Polarization of Trust

Trust Index

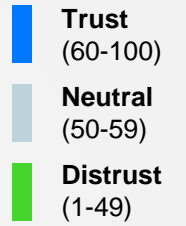
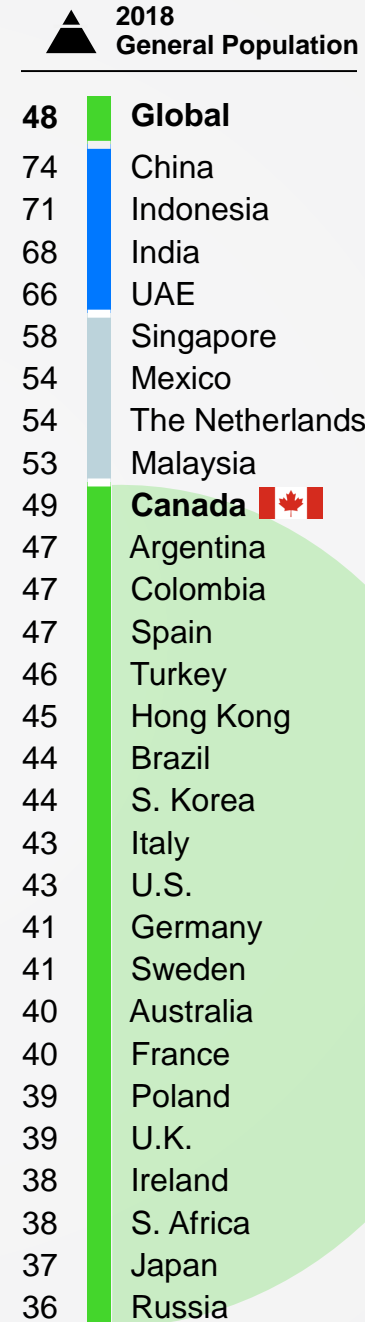
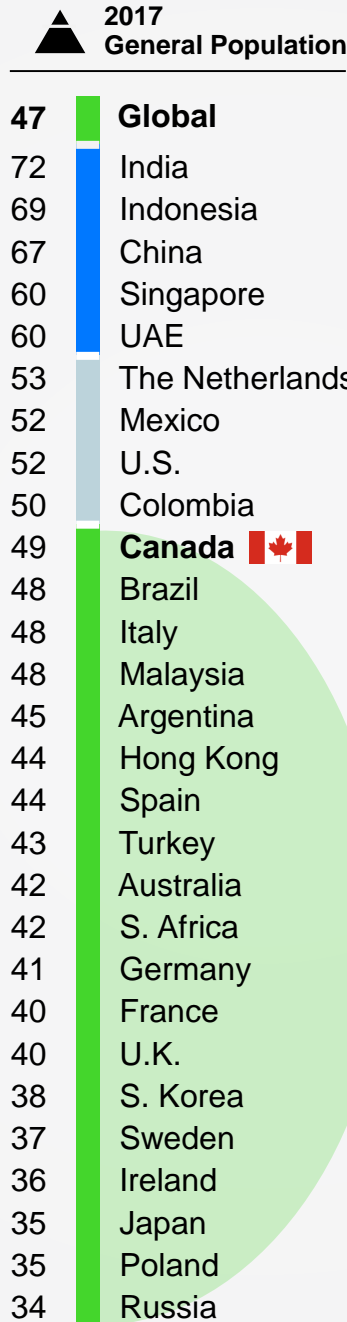
A World of Distrust

Average trust in institutions, general population, 2017 vs. 2018

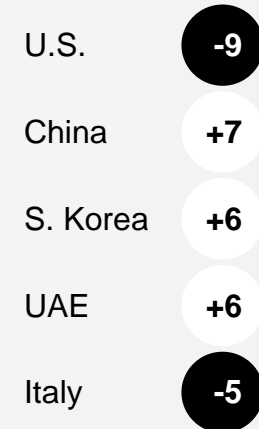
Global Trust Index remains at distruster level

20 of 28 markets are distrusters, up 1 from 2017

Source: 2018 Edelman Trust Barometer.
The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. General population, 28-market global total.



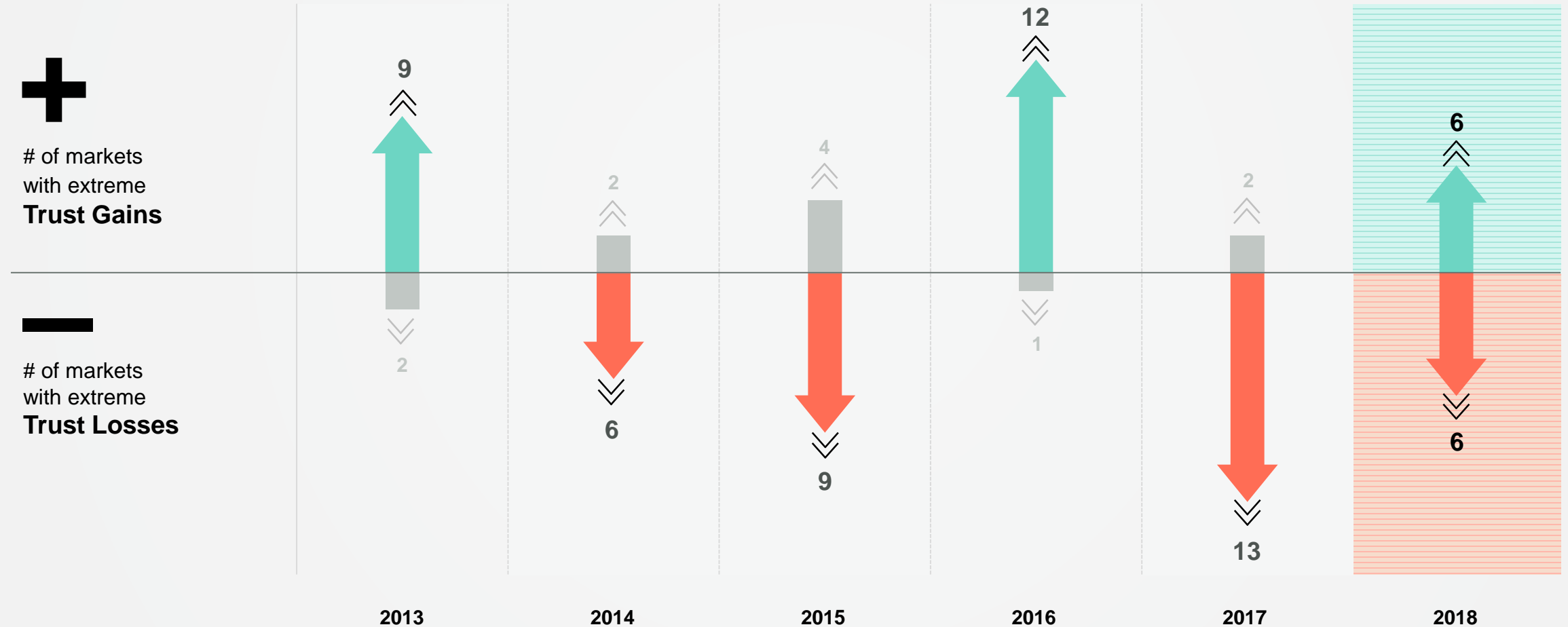
Biggest changes in



Trust decline in the U.S. is the steepest ever measured

A World Moving Apart

Number of markets with extreme changes in their aggregate trust in the four institutions, 2013 to 2018



Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2013-2018) percentage point change across the four institutions (TRU_INS). General population, 28-market global total. For more details on how the Trust Volatility Measure was calculated, please refer to the Technical Appendix.

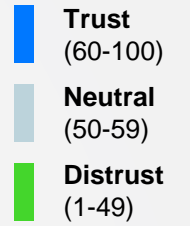
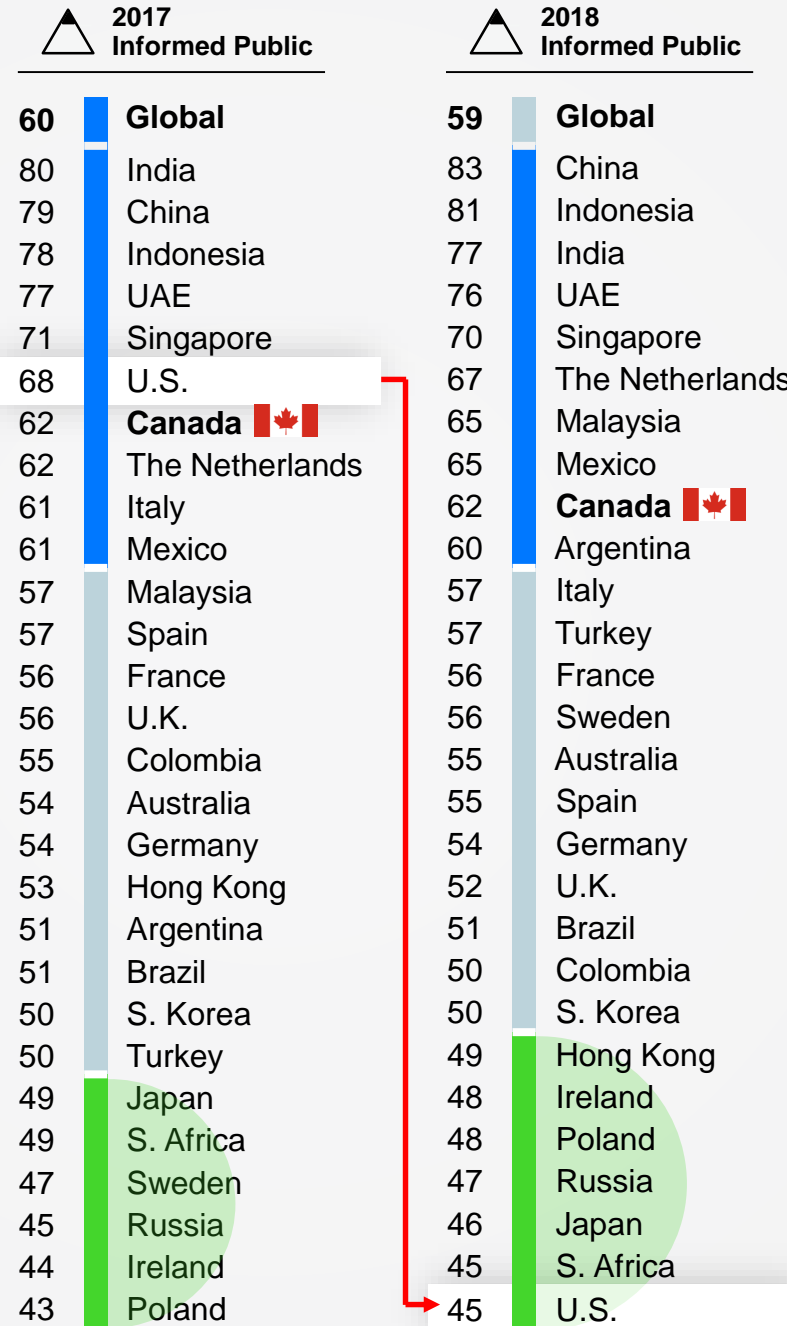
Trust Index

Canada's Informed Public Holds Steady

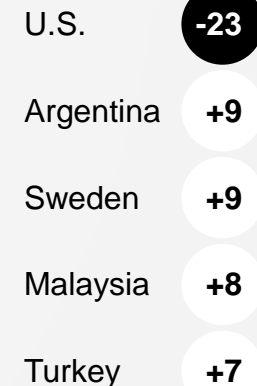
Average trust in institutions, informed public, 2017 vs. 2018

A 1-point decline in the Global Trust Index

Source: 2018 Edelman Trust Barometer.
The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed public, 28-market global total.



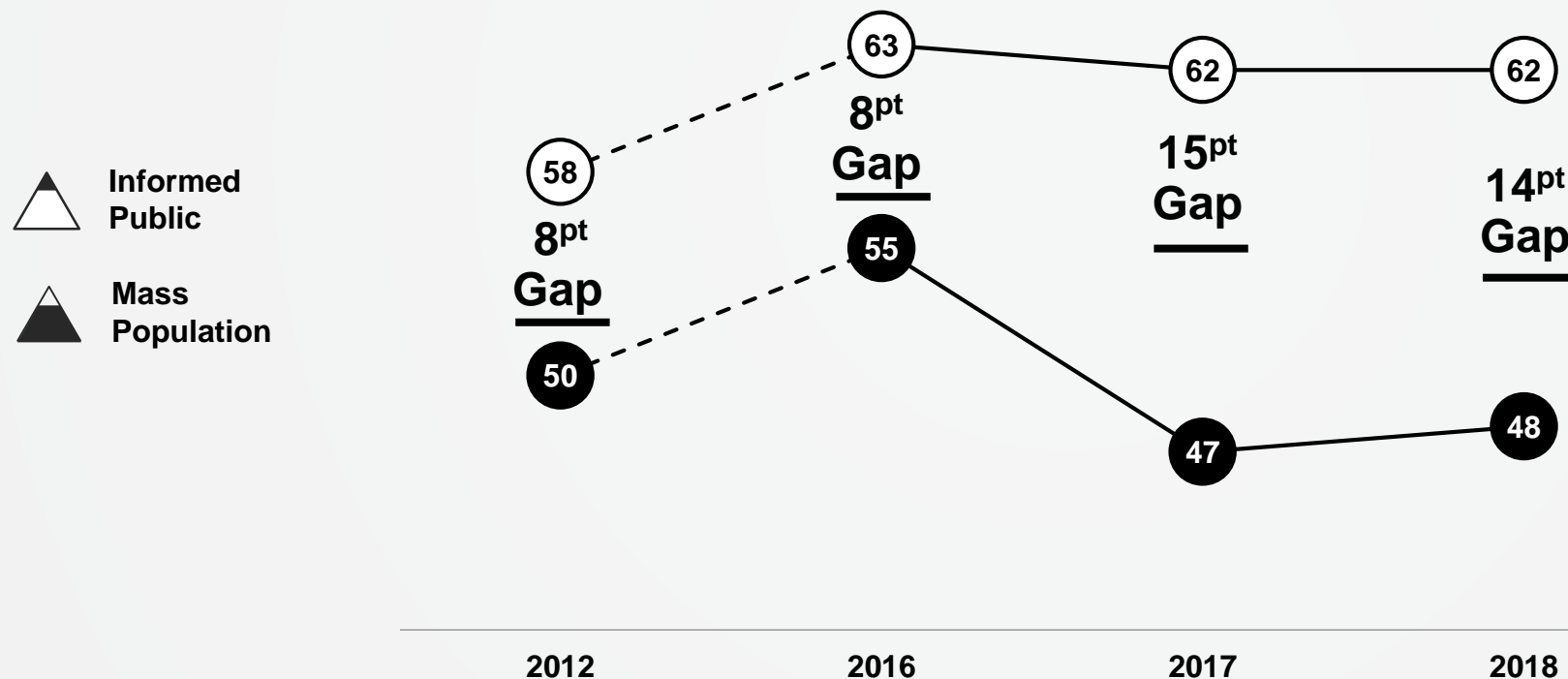
Biggest changes in



U.S. Trust Index crashes 23 points

Polarization Still Exists between Informed and Mass Populations

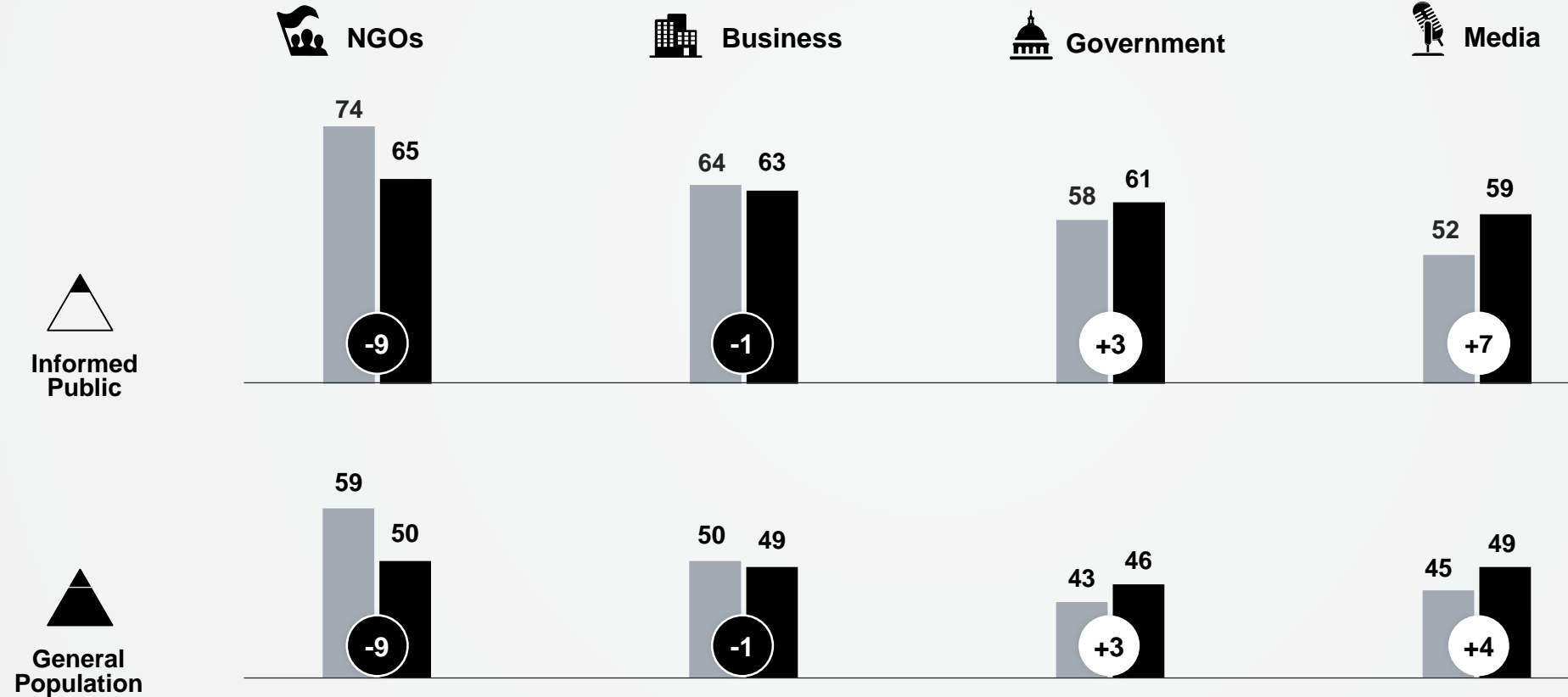
Per cent trust in the four institutions of government, business, media and NGOs, 2012 to 2018



Source: 2018 Edelman Trust Barometer. The Trust Index is an average of a country's trust in the institutions of government, business, media and NGOs. Informed public and Mass Population, Canada.

Media Trust Increases While NGO Trust Drops

Per cent trust in each institution, and change from 2017 to 2018, in Canada

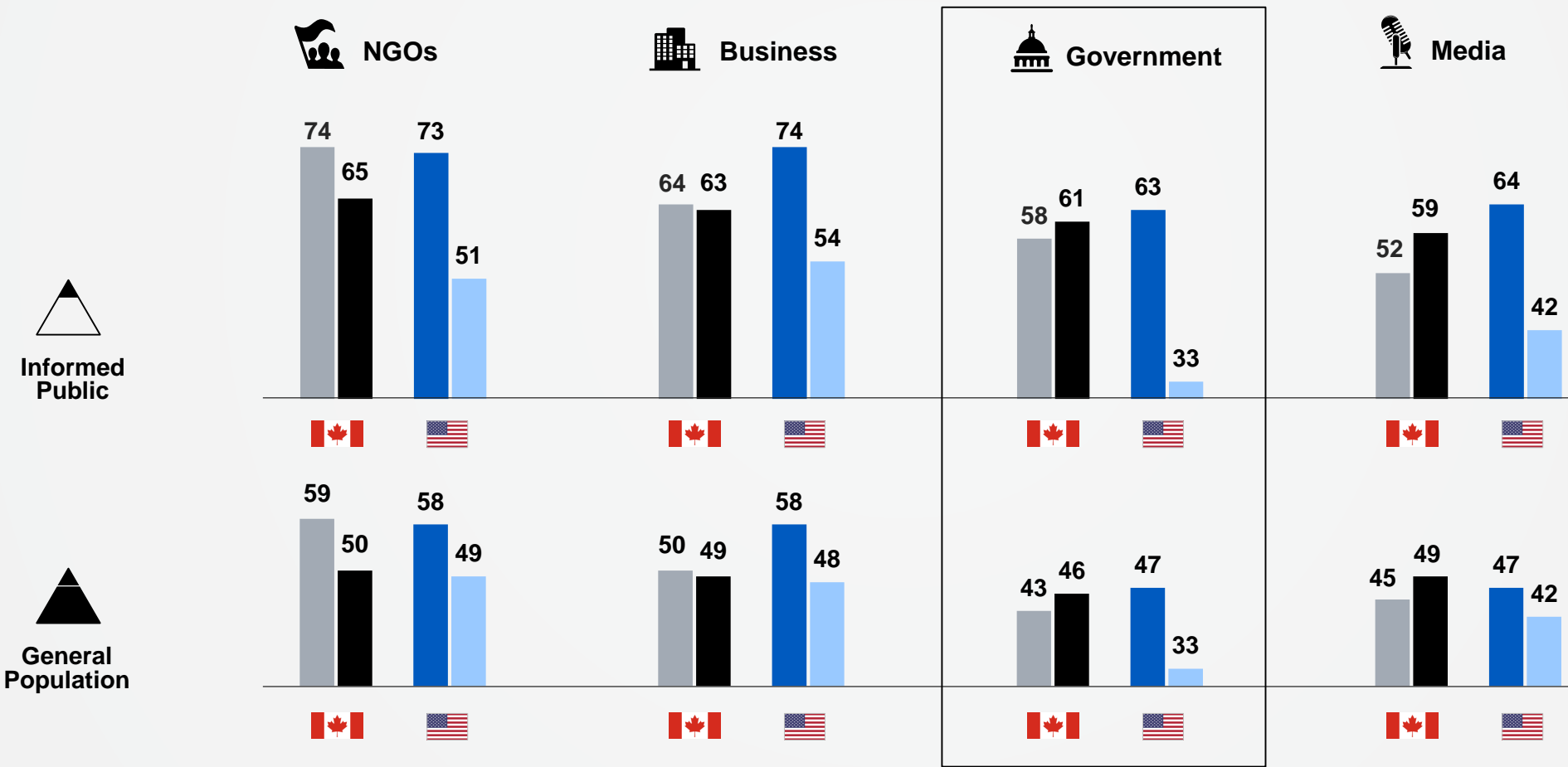


Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and General Population, Canada.

Canada Steady While Trust in U.S. Institutions Crashes

Per cent trust in each institution, and change from 2017 to 2018, in Canada, compared against U.S.

- Canada 2017
- Canada 2018
- U.S. 2017
- U.S. 2018



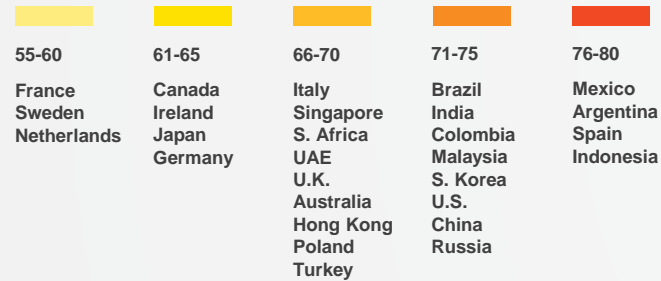
Source: 2018 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust) Informed Public and General Population, Canada and U.S.

A black and white photograph of a protest. A large sign at the top reads 'FAKE NEWS' in bold, hand-painted letters. Below it, a person with glasses is visible in the foreground. Other signs and people are blurred in the background.

In Search of Truth

Canadians Worried About Fake News as a Weapon

Per cent who worry about false information or fake news being used as a weapon



65%

in Canada worry about false information or fake news being used as a weapon

Source: 2018 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree), question asked of half of the sample. General population, Canada.

Germany passes a law that fines social media companies for failing to delete fake news

Pope criticizes spread of fake news

Investigation into Russian meddling and influence in 2017 election

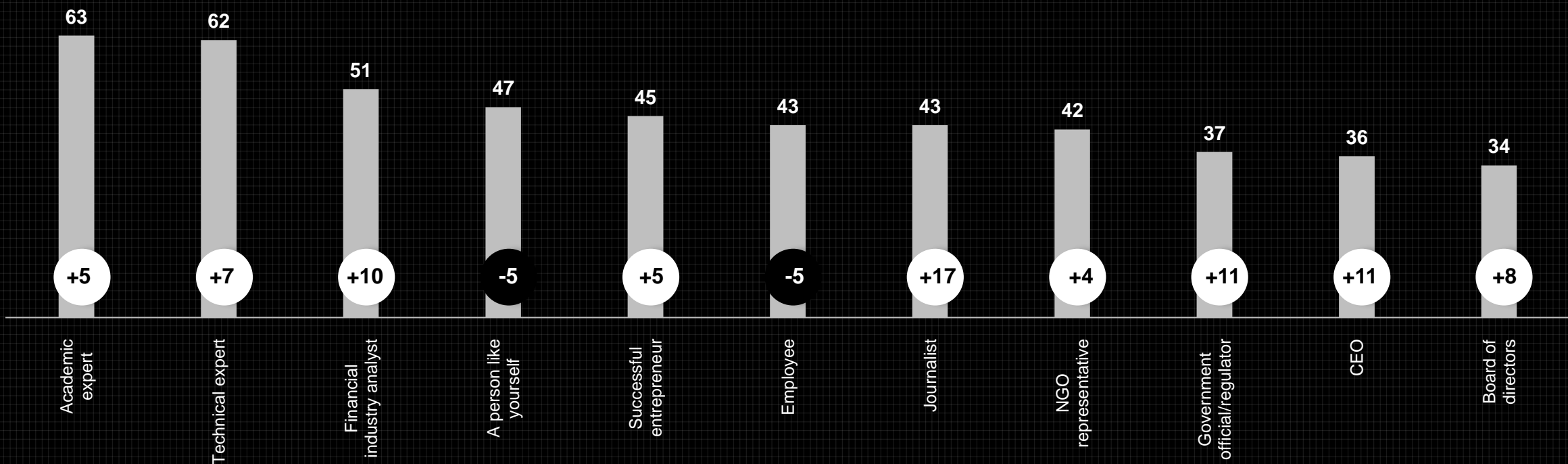
Singapore announces plans to introduce laws designed to fight fake news

Fake news disrupts elections in South Africa

Canadians Returning to Figures of Authority for Truth

Y-to-Y Change

Per cent who rate each spokesperson as very/extremely credible, and change from 2017 to 2018, in Canada

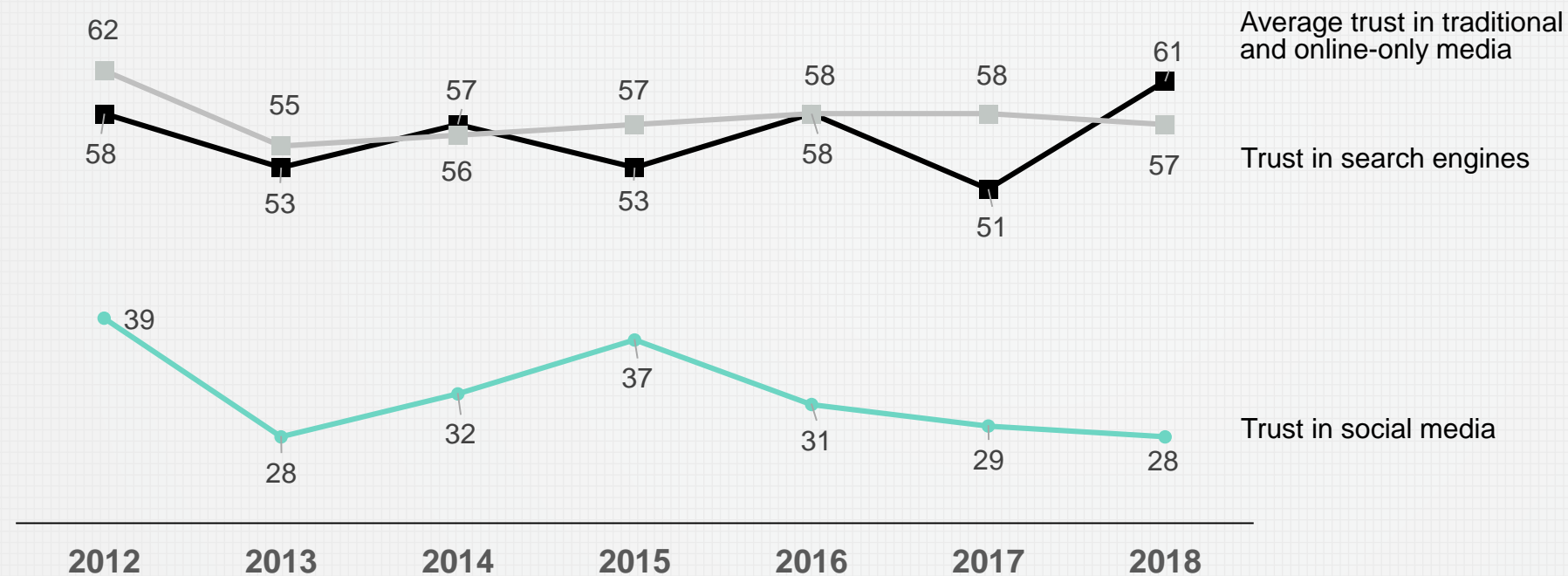


Source: 2018 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all? (Top 2 Box, Very/Extremely Credible), question asked of half of the sample. General population, Canada.



Trust in Journalism Rebounds, but Trust in Social Media Remains Low

Per cent trust in general news and information sources, 2012 to 2018, in Canada



+10
Journalism

-1
Search

-1
Social

Source: 2018 Edelman Trust Barometer. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” (Top 4 Box, Trust), question asked of half of the sample. General population, Canada.

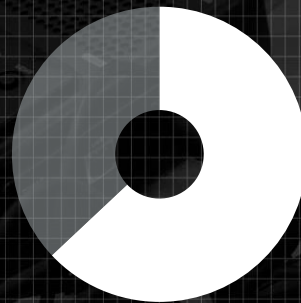
Journalism is an average of traditional media and online-only media.



Skeptical About News Organizations

Per cent who agree that news organizations are overly focused on ...

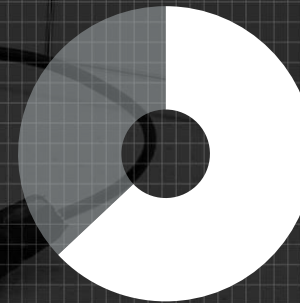
Attracting Large Audiences



63%

are more concerned with attracting a big audience than reporting

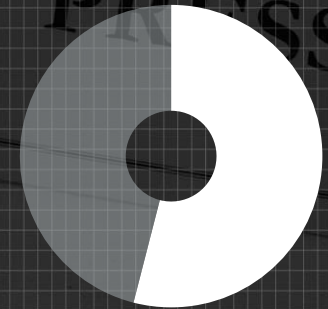
Breaking News



63%

sacrifice accuracy to be the first to break a story

Politics



54%

support an ideology vs. informing the public

Source: 2018 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". (Top 4 Box, Agree), question asked of half of the sample. General population, Canada.

Canadians Generally Less Engaged with News

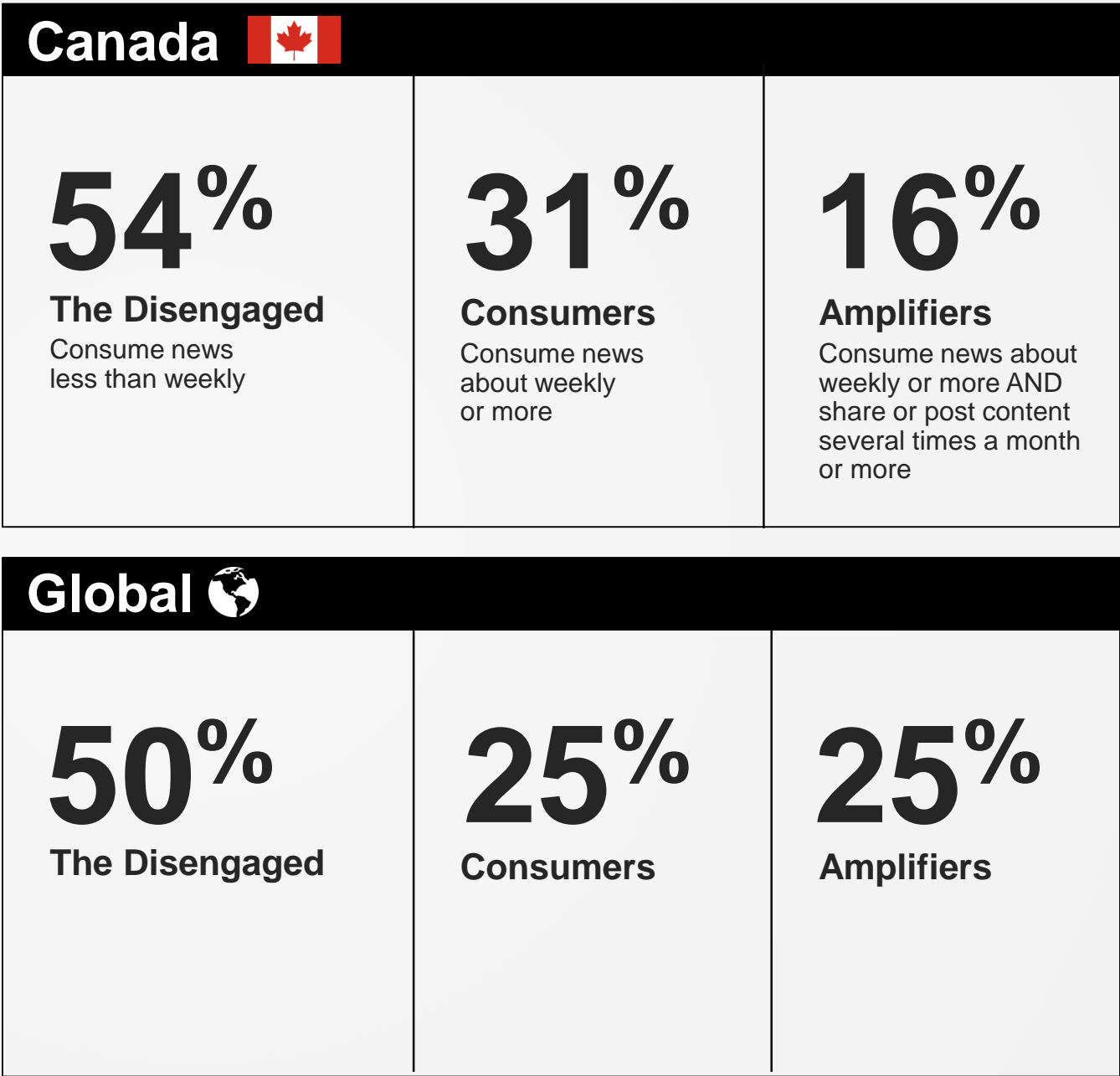
Consumption

How frequently do you consume news produced by major news organizations, either at the original source, shared by others or pushed to you in a feed?

Amplification

How often do you share or forward news items, or post opinions or other content?

Source: 2018 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. General population, 28-market global total and Canada. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

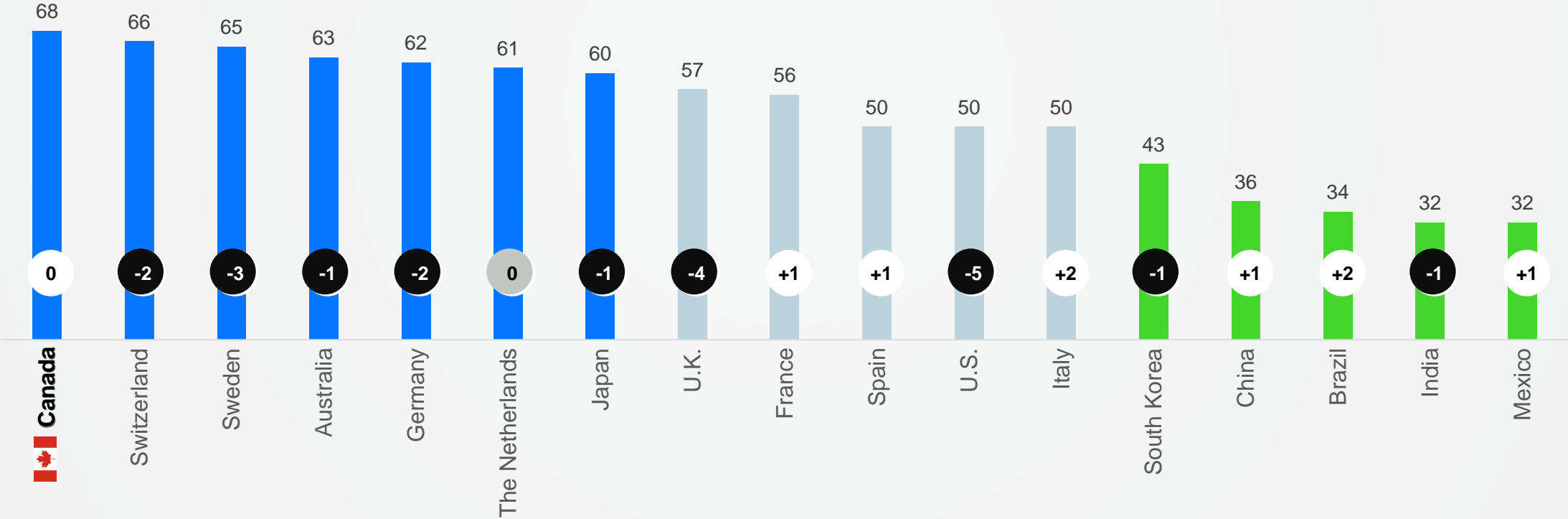
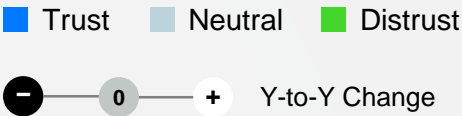




Imperative for Canadian Business to Lead

Canadian Companies Most Trusted Globally

Trust in companies headquartered in each country, and change from 2017 to 2018

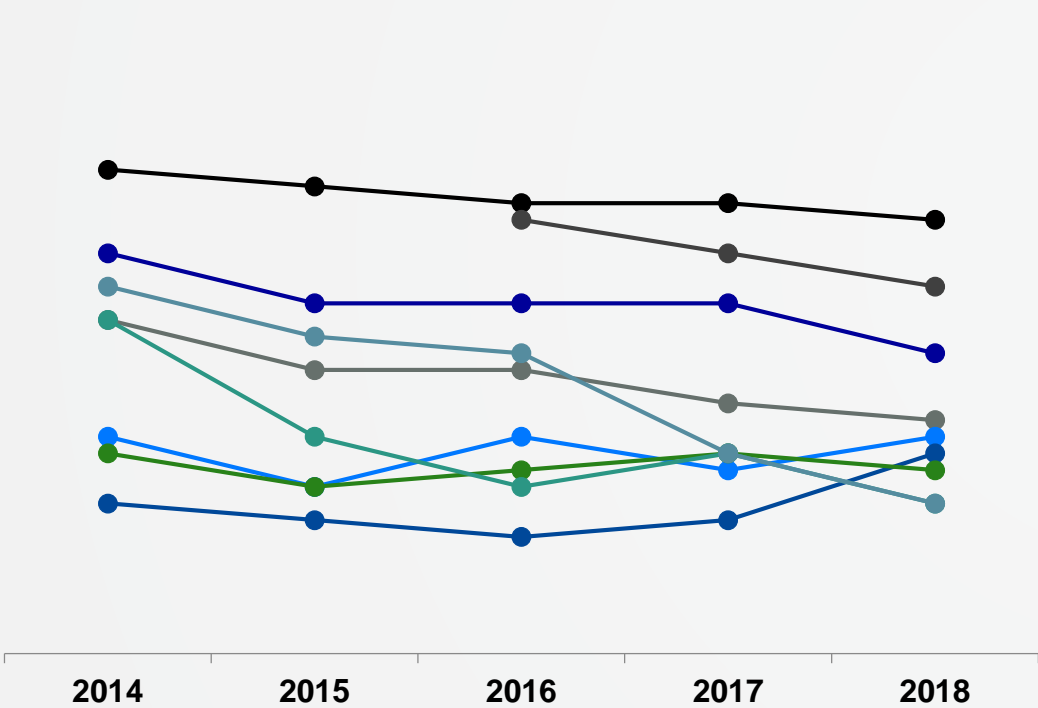


Source: 2018 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same nine-point scale, where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” (Top 4 Box, Trust), countries shown to half of the sample. General Population, 28-market global total.

Sector Trends

Trust in Most Sectors Declining

Trust in each industry sector, and change from 2014 to 2018, in Canada



-
0
+
 Change, 2014 to 2018

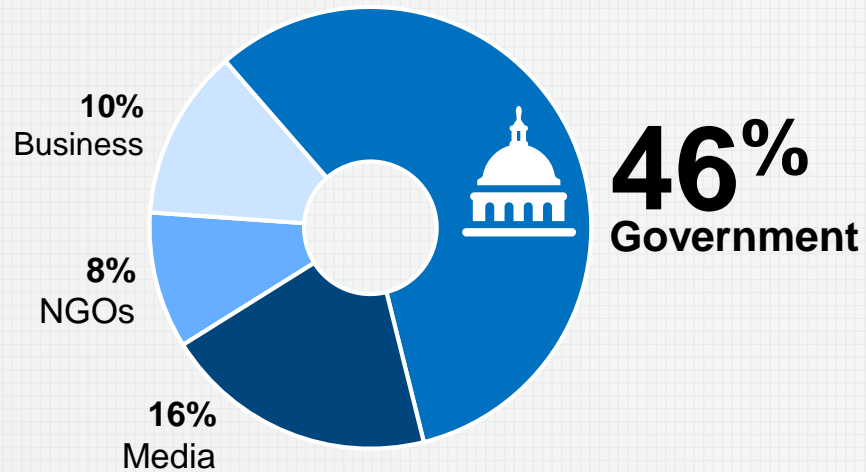
Industry	2014	2015	2016	2017	2018	5 yr. Trend
Technology	74	73	72	72	71	-3
Health care	-	-	71	69	67	-
Food and beverage	69	66	66	66	63	-6
Consumer packaged goods	65	62	62	60	59	-6
Telecommunications	58	55	58	56	58	0
Energy	54	53	52	53	57	+3
Financial services	57	55	56	57	56	-1
Automotive	65	58	55	57	54	-11
Entertainment	67	64	63	57	54	-13

Source: 2018 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. (Top 4 Box, Trust), industries shown to half of the sample. General Population, Canada.

State of Government Opens Opportunity for CEOs

Per cent who agree and per cent who say CEOs should take the lead on change

Which institution is the most broken?



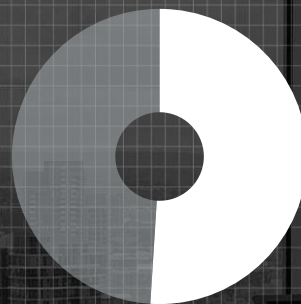
Per cent who say that
CEOs should take the lead on change rather than waiting for government to impose it

68%

Source: 2018 Edelman Trust Barometer. ATT_STE. Please indicate which institution – Government, Media, Business or NGO's – is best described by each of the following statements? CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. General population, Canada.

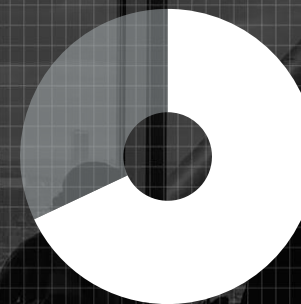
Business Must Show Commitment to Long-Term

Per cent who agree that ...



51%

Companies that only think about themselves and their profits are bound to fail






68%

CEOs are driven more by greed than a desire to make a positive difference in the world

Source: 2018 Edelman Trust Barometer. TMA_SIE_SHV. Please indicate how much you agree or disagree with the following statements. (Top 4 Box, Agree), question asked of half of the sample. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statements? (Top 4 Box, Agree), question asked of half of the sample. General population, Canada.

Business Must Address Market Dynamics

Trust-building mandates for business

 Global	 Canada	 United States
Safeguard Privacy	Drive Economic Prosperity	Safeguard Privacy
Invest in Jobs	Invest in Jobs	Investigate Corruption
Innovate	Innovate	Ensure Equal Opportunity
Provide for Future Generations	Guard Information Quality	Guard Information Quality
Guard Information Quality	Ensure Equal Opportunity	Improve Quality of Life

Source: 2018 Edelman Trust Barometer. Trust Volatility Measure. The net year-over-year (2013-2018) percentage point change across the four institutions (TRU_INS). General population, 28-country global total. Trust-building mandates Analysis. The most effective trust building mandates for each institution. INS_EXP_BUS. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about business in general, how would you characterize each using the following three-point scale. General population, 28-market global total, Canada and U.S. For more details on the Trust Volatility Measure and Trust Mandates Analysis, please refer to the Technical Appendix.

Canadians Expect Business To Advocate for Progress

Top trust-building mandates for each institution, in Canada



Source: 2018 Edelman Trust Barometer. Trust-Building Mandates Analysis. The most effective trust building mandates for each institution. INS_EXP_GOV; INS_EXP_MED; INS_EXP_BUS; and INS_EXP_NGO. Below is a list of potential expectations or responsibilities that a social institution might have. Thinking about [insert institution] in general, how would you characterize each using the following three-point scale. General population, Canada. For more details on the Trust Mandates Analysis, please refer to the Technical Appendix.

Takeaways



**Trust depends on clarity, balance,
and validation.**

**Businesses must be agents
of change.**

**Canadians have a renewed
appetite for credible, authoritative
voices.**



2018 Edelman Trust Barometer

Canada

www.edelman.ca/trust
#TrustBarometer

