

TRUST IN HEALTH

Global Health
Report

Edelman Trust Barometer 2020



WITH YOU TODAY



Roxane PHILIPPE

SVP Health

Elan Edelman



Carolyn PAUL

EMEA Health Chair

Edelman



Lisa TAULEIGNE

Deputy Managing Director

Edelman Intelligence

Spring Update: Trust and the Covid-19 Pandemic

Methodology



Online survey in 11 markets:

Canada, China, France, Germany, India, Japan, Mexico, Saudi Arabia, S. Korea, U.K. and U.S.

13,200+ respondents total

All fieldwork was conducted between April 15 and April 23, 2020

January 2020 Trust Barometer fieldwork was conducted between October 19 and November 18, 2019

11-market global data margin of error: General population +/- 0.9% (N=13,200), informed public +/- 3.0% (N=1,100), mass population +/- 1.0% (N=10,741+).

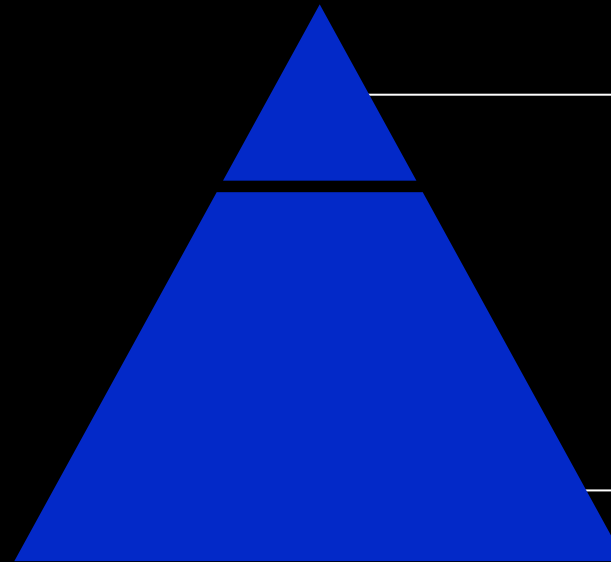
Market-specific data margin of error: General population +/- 2.8% (N=1,200), informed public +/- 9.8% (N=100), mass population +/- 2.9% to 3.7% (N=min 691, varies by market).

General Online Population

1,200
respondents
per market

Ages
18+

All slides show general
online population data
unless otherwise noted



Informed Public

100 respondents in each market
Represents **19%** of total global population

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 public policy and business news



Mass Population

All population not
including informed public

Represents **81%** of total
global population



└

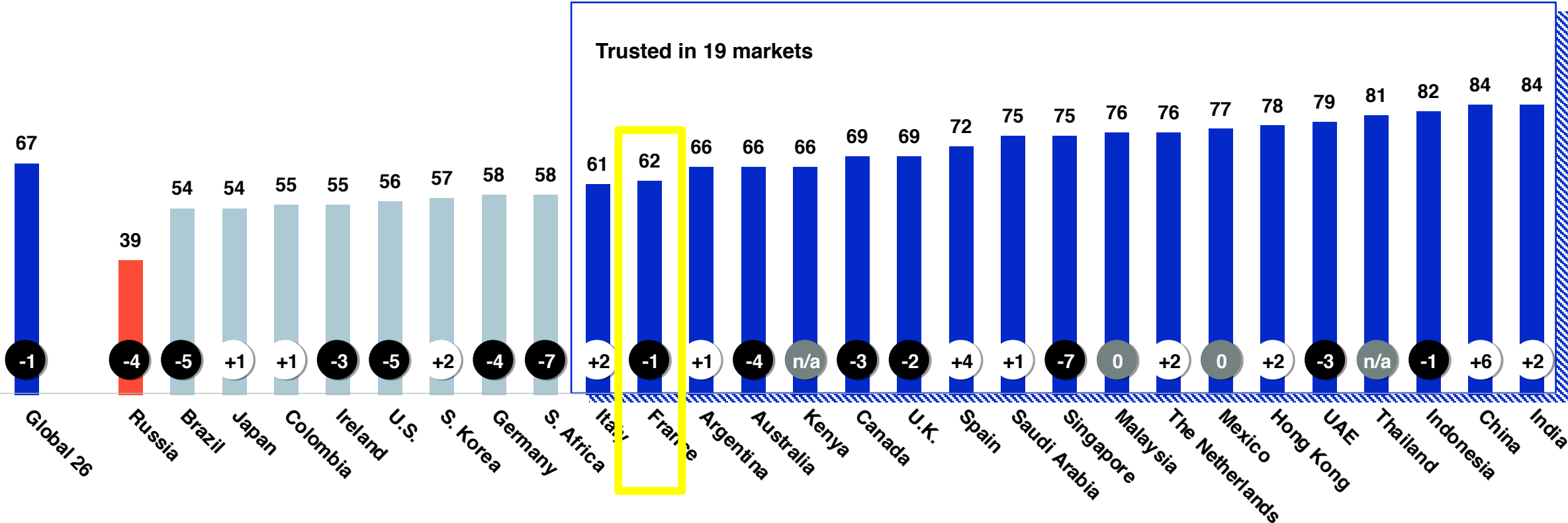
BACK IN JANUARY 2020

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TRUST IN HEALTHCARE WAS STABLE GLOBALLY AND IN FRANCE AMONG GENERAL PUBLIC...



Percent trust in healthcare



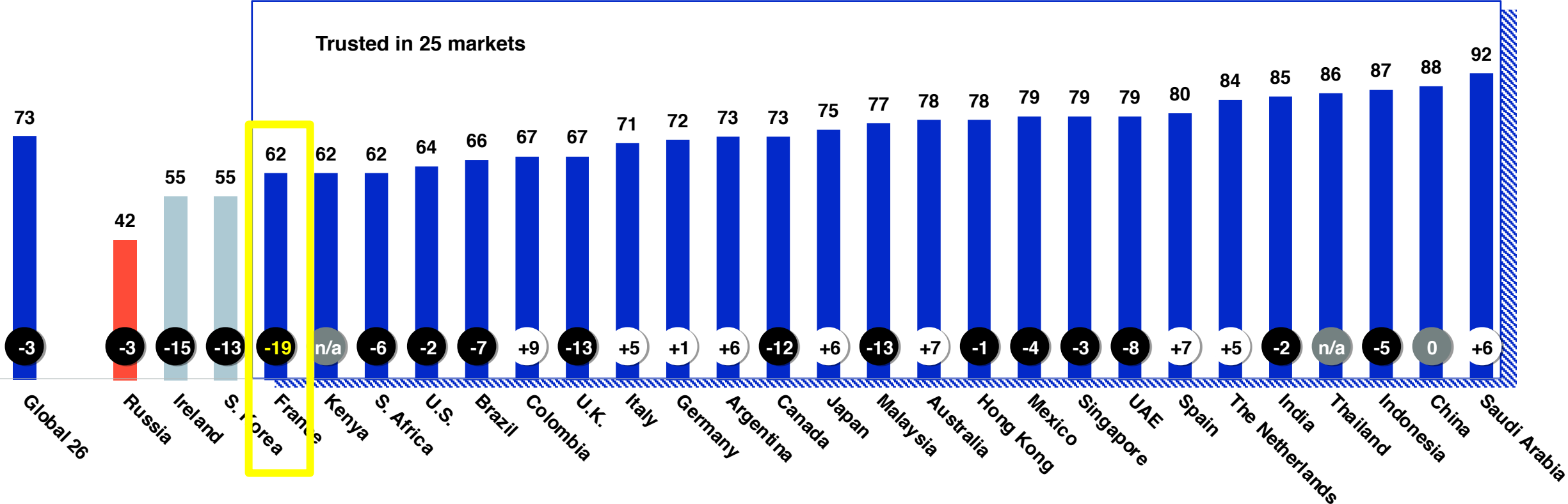
... BUT A HUGE DROP IN FRANCE AMONG INFORMED PUBLIC



Informed public
Age 25-64



Percent trust in healthcare



2020 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. Informed public, 26-mkt avg.



⊥

TRUST: THE FRENCH EXCEPTION?

T

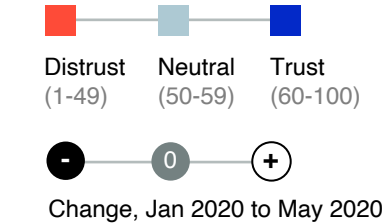
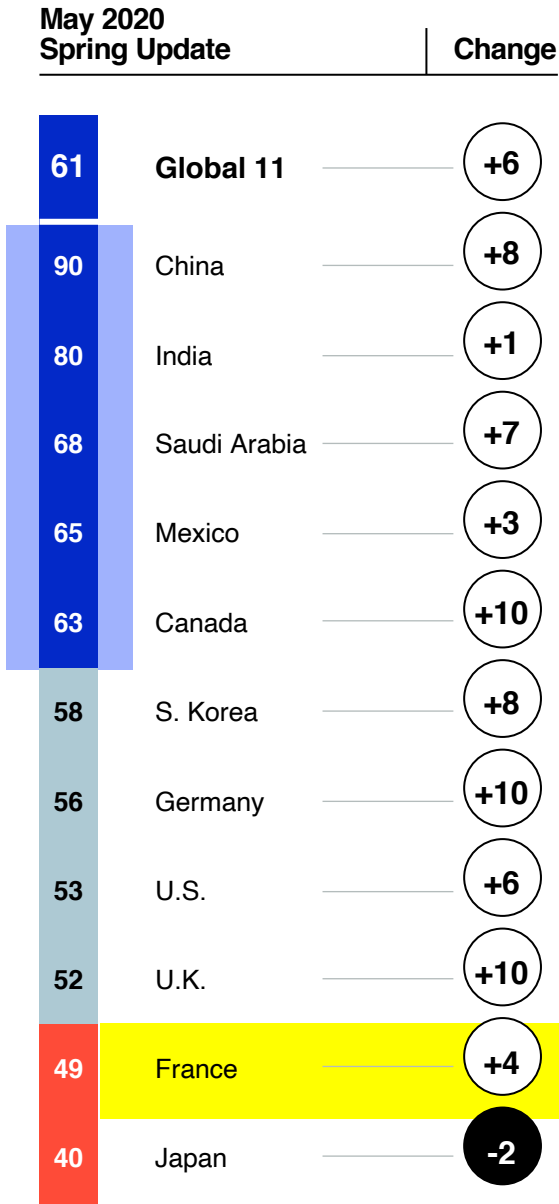
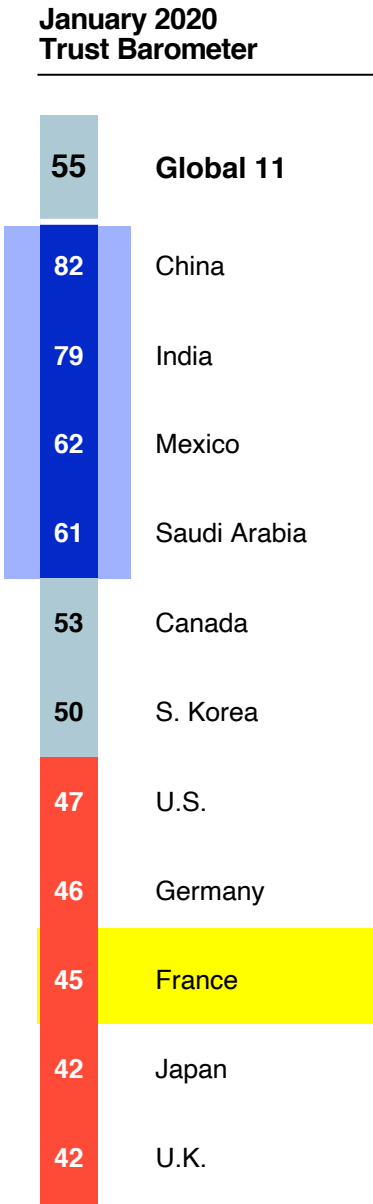
IN FRANCE, INCREASE IN TRUST IS RELATIVELY LIMITED

Trust Index

11-market global average increases 6 pts.,
with increases in 10 of 11 markets

Distrusting markets decline from 5 to 2

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.

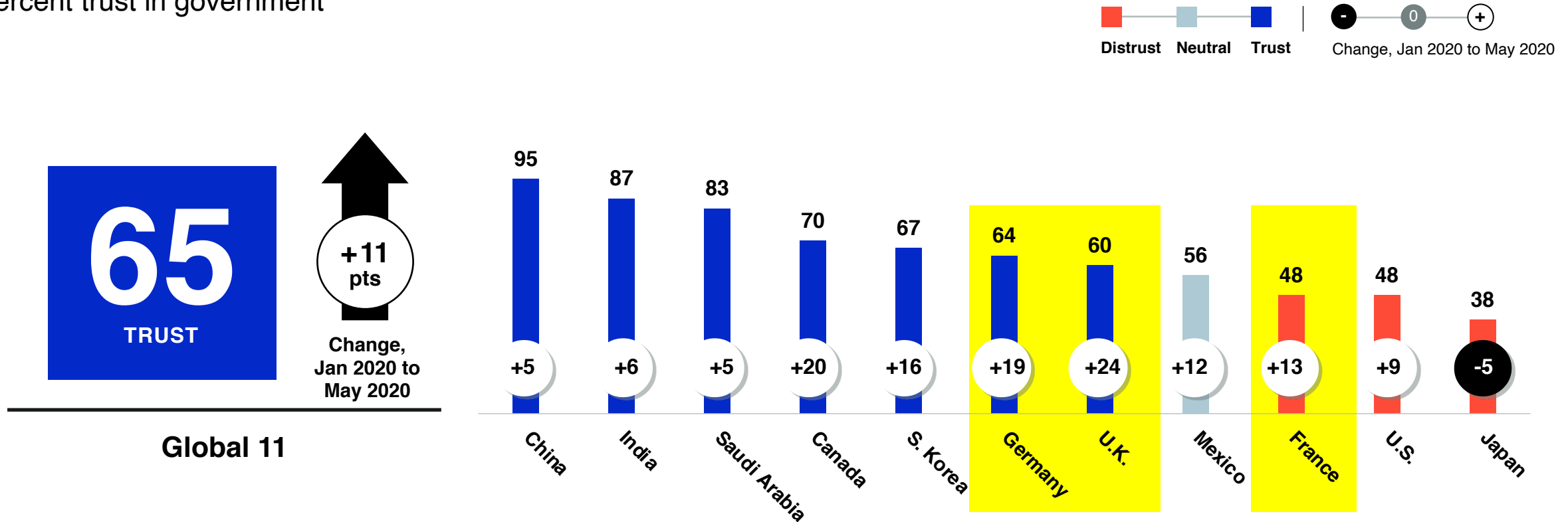


Change in the Trust Index,
Jan 2012 – May 2020
(10-market avg.)

	Trust Index	Change
2012	45	n/a
2013	50	+5
2014	48	-2
2015	47	-1
2016	51	+4
2017	49	-2
2018	49	0
2019	53	+4
Jan 2020	55	+2
May 2020	61	+6

THE GOVERNMENT REMAINS DISTRUSTED, UNLIKE IN GERMANY AND GREAT-BRITAIN...

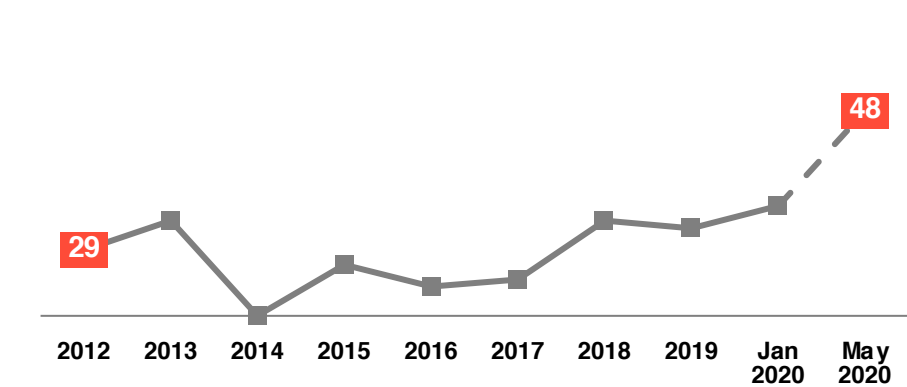
Percent trust in government



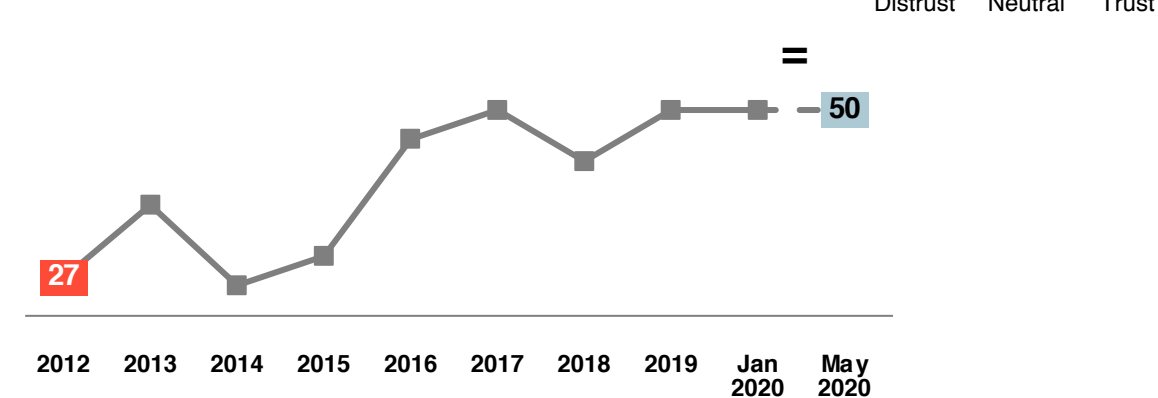
... WHILE TRUST IN THE OTHER INSTITUTIONS REMAIN STABLE

Pourcentage de confiance en France

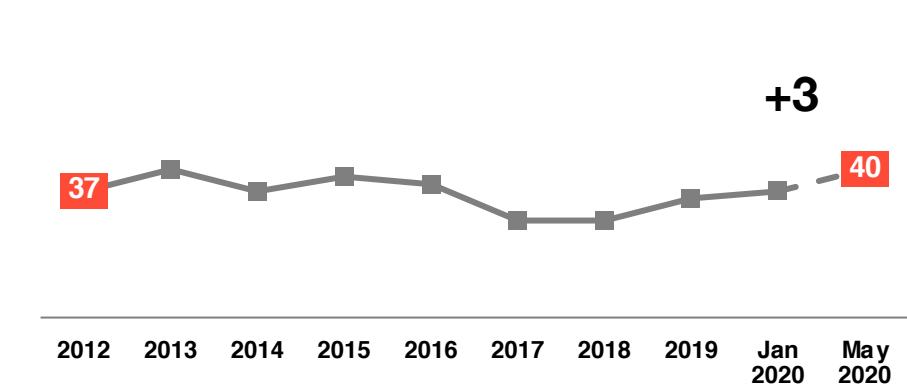
Government



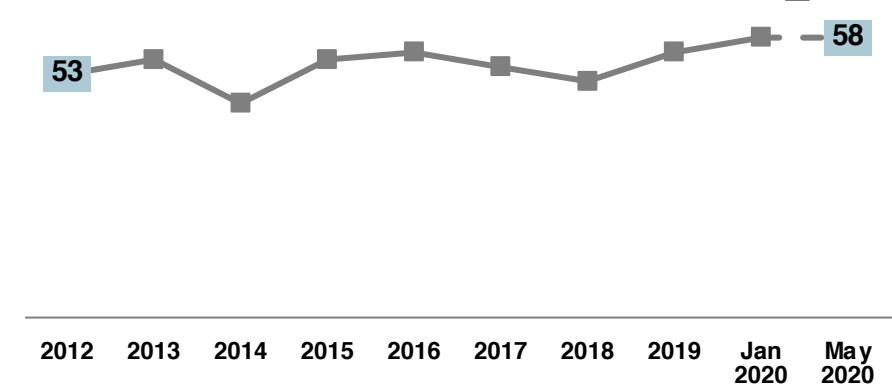
Business



Media

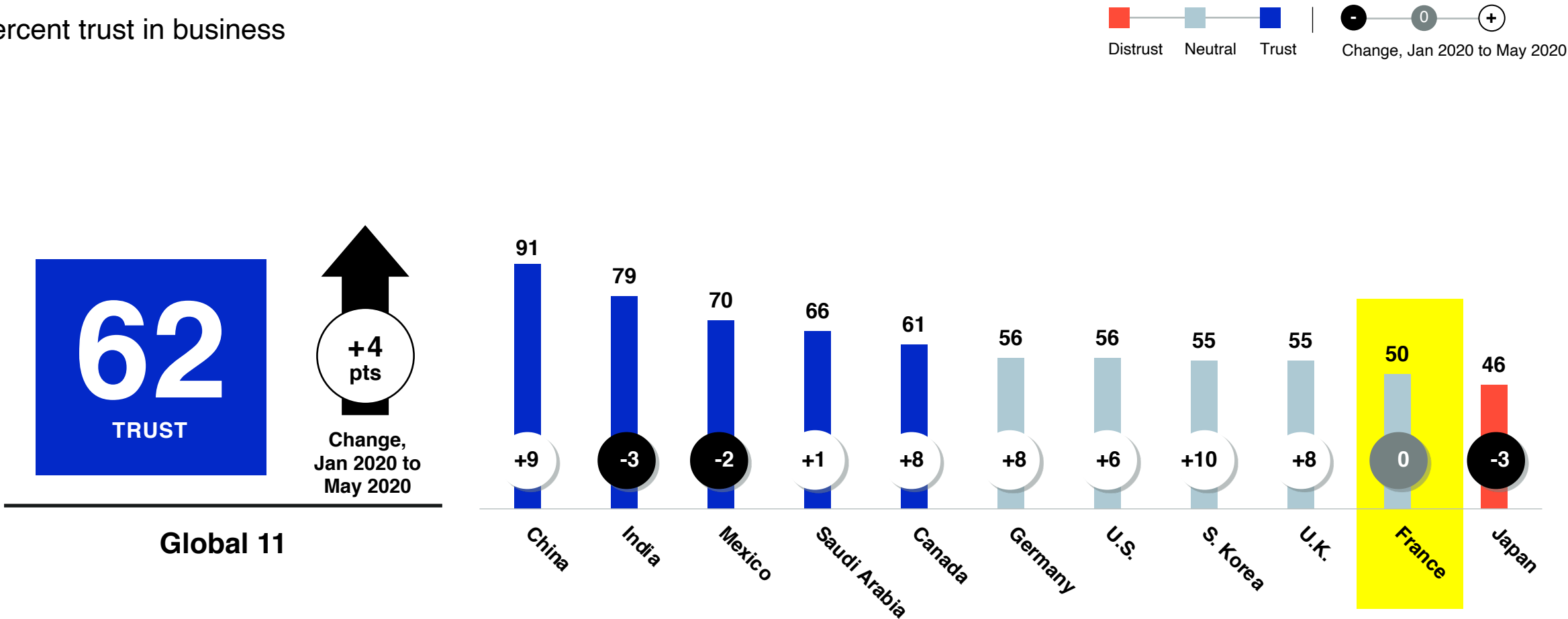


NGOs



FRANCE IS ACTUALLY ONE OF THE ONLY MARKETS WHERE TRUST IN BUSINESS HAS NOT INCREASED

Percent trust in business



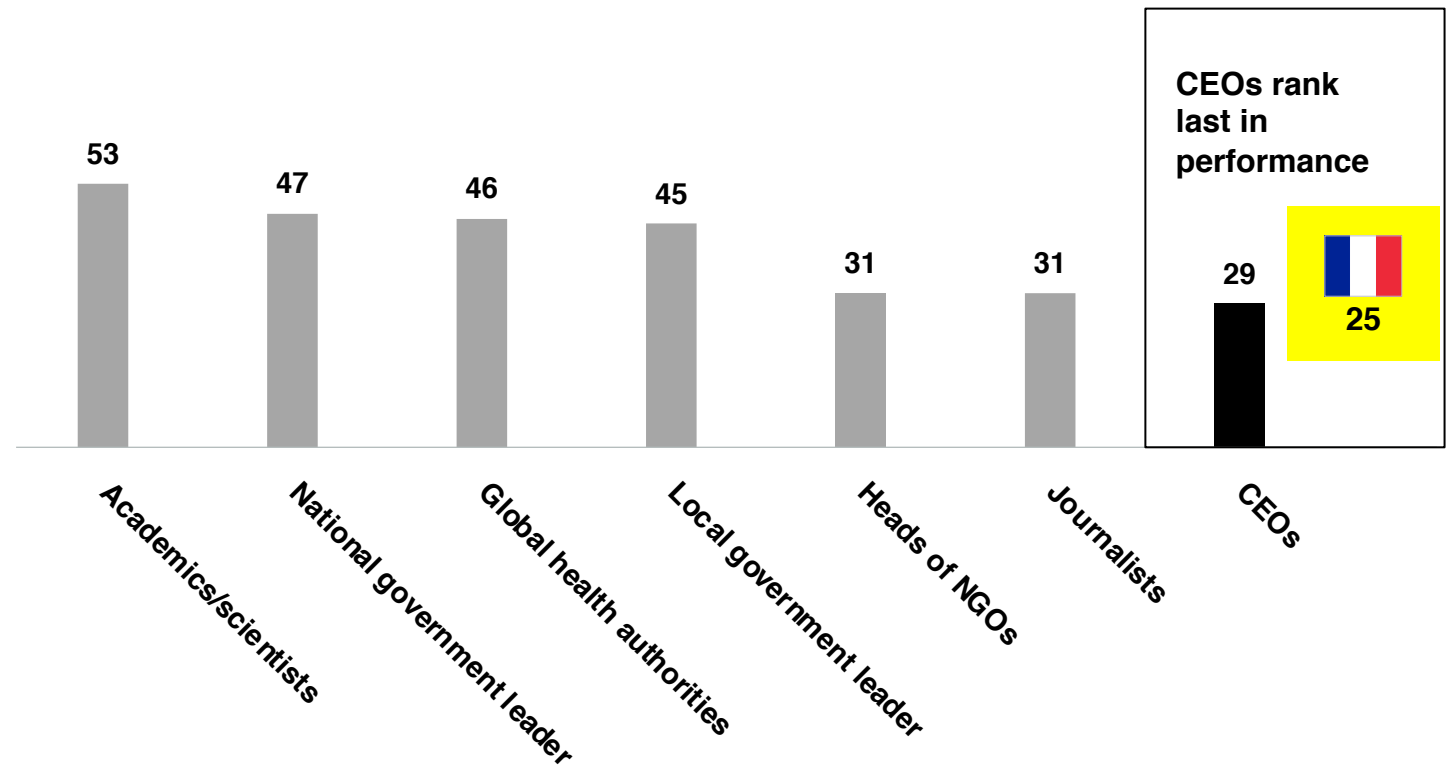
2020 Edelman Trust Barometer Spring Update. TRU_INS. [Business in general] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

CEOS FAILING TO DEMONSTRATE EXPECTED PUBLIC LEADERSHIP

CEOs should take the lead on addressing the pandemic rather than waiting for government to impose restrictions and demands on their businesses

└
65%

Percent who say each are doing **an outstanding job** meeting the demands placed on them by the pandemic



BUSINESS NOT SEEN AS MEETING THE CHALLENGE WITH EXPECTED LEVEL OF COMPETENCE

Percent who say business is performing well or very well on each

Ensuring the **products and services that people need most are readily available** and easily accessible

⊥
47%

doing this well or very well

Protecting essential employees whose jobs require them to work outside of their home thereby increasing their risk of exposure to the virus

⊥
44%

doing this well or very well

Preparing for the eventual recovery and figuring how to return things to normal as quickly as possible

⊥
42%

doing this well or very well


43%



36%


38%

BUSINESS NOT SEEN AS LOOKING OUT FOR EMPLOYEES OR BUSINESS PARTNERS

Percent who say business is performing well or very well on each

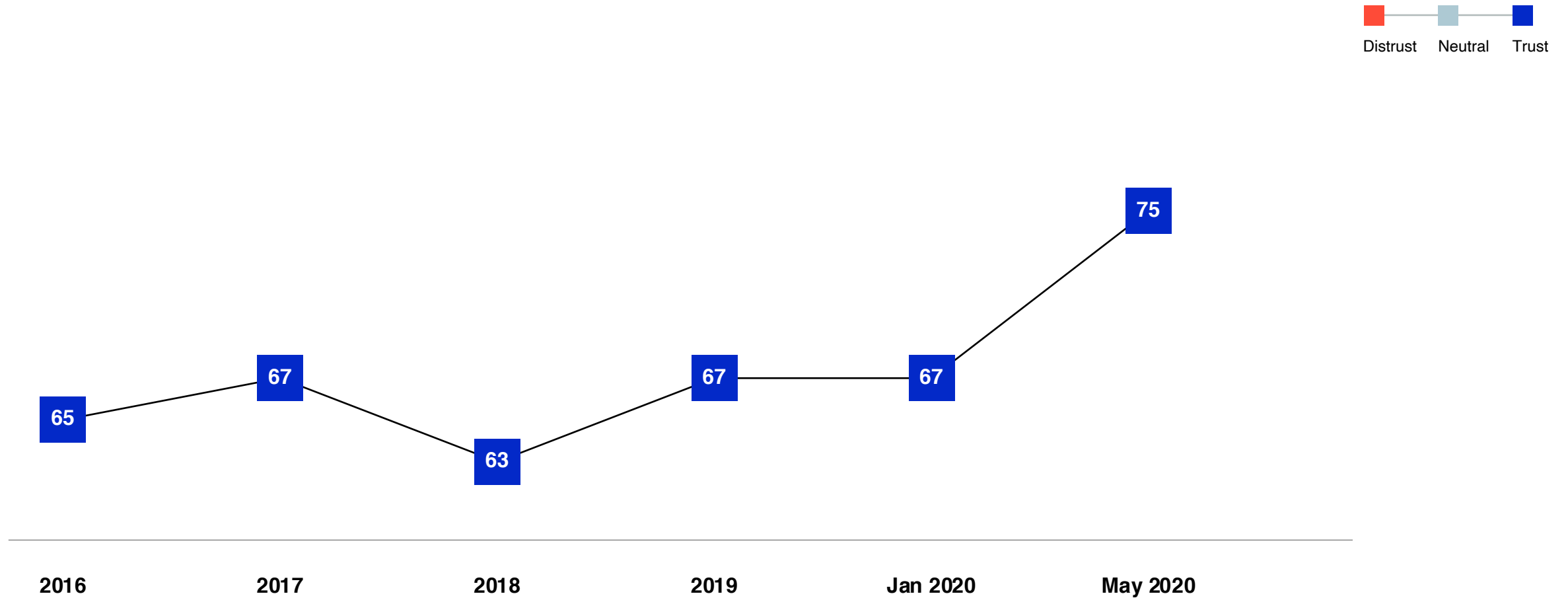




**ONE OF THE MOST
TRUSTED, THE
HEALTHCARE SECTOR
ALSO RAISES HUGE
EXPECTATIONS**

TRUST AT ALL-TIME HIGH IN HEALTHCARE

Percent trust in the healthcare sector



SECOND WAVE IS ON EVERYONE'S MIND

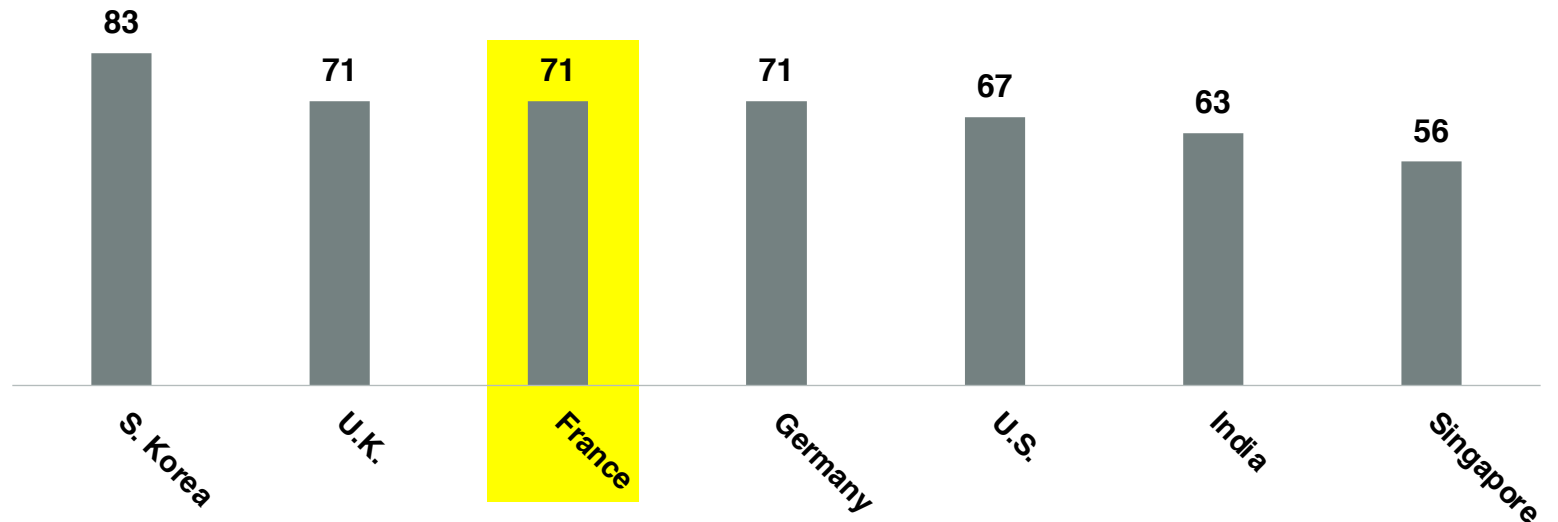
AUGUST 2020

Percent who say yes

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

68%

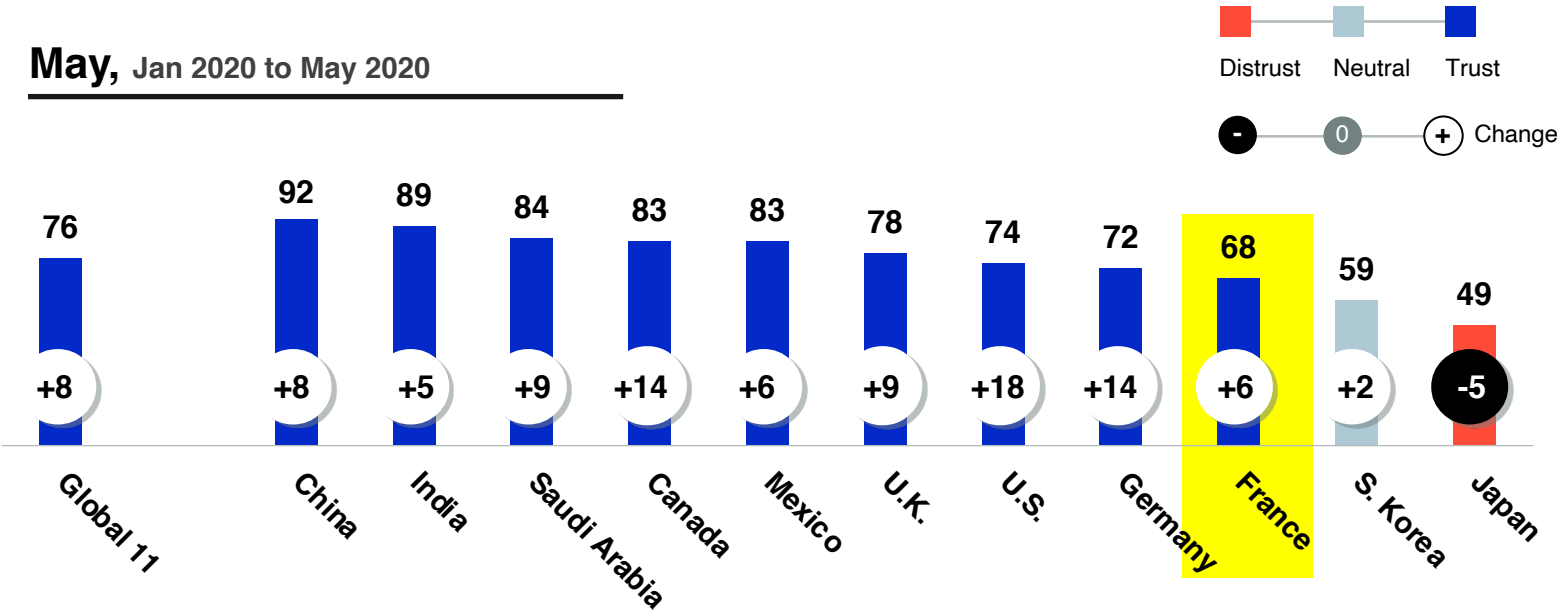
Global 7



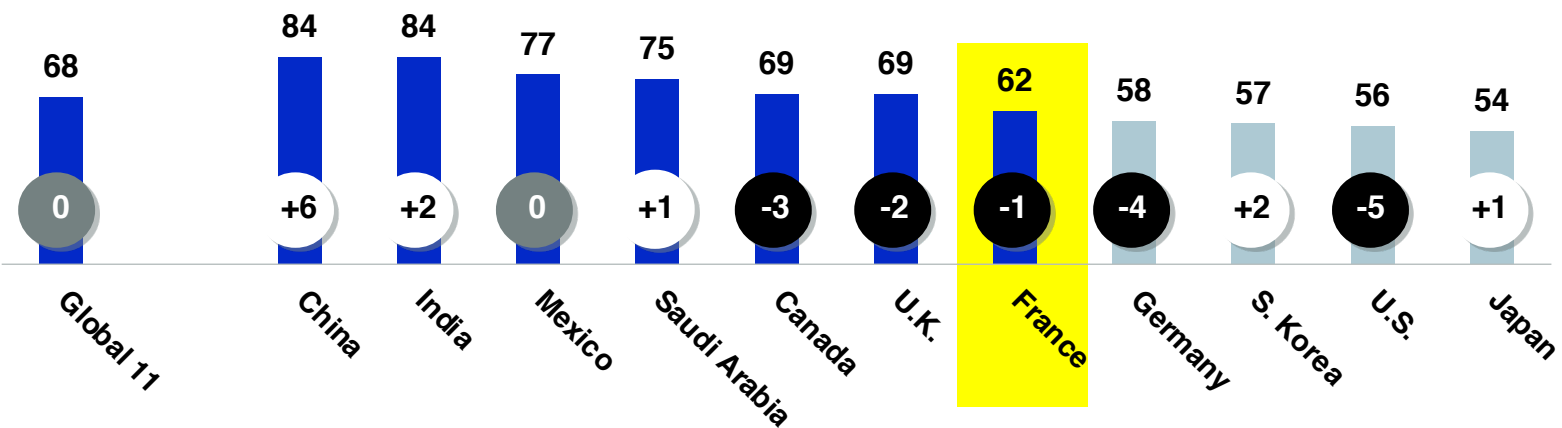
INCREASED TRUST IN HEALTHCARE; DOUBLE-DIGIT GAINS IN THE U.S, CANADA, AND GERMANY

Percent trust in the healthcare sector

May, Jan 2020 to May 2020



January, Jan 2019 to Jan 2020

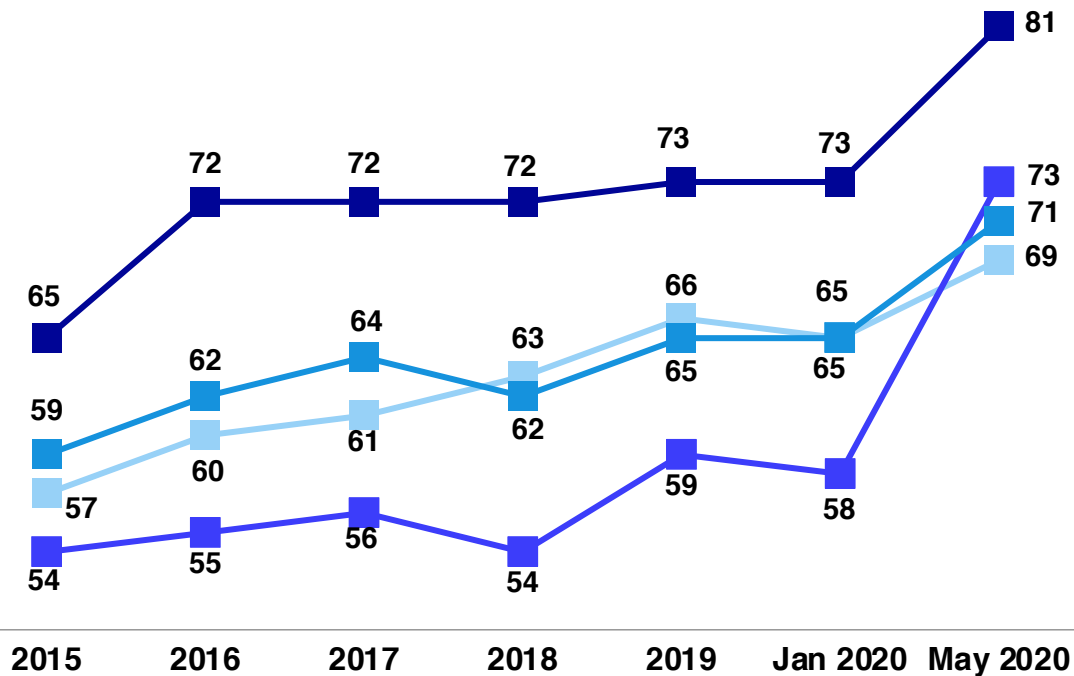


2020 Edelman Trust Barometer Spring Update. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. General population, 11-mkt avg.

TRUST AT ALL-TIME HIGHS ACROSS HEALTHCARE SUBSECTORS

Percent trust in the healthcare sector/subsectors

■ Distrust
 ■ Neutral
 ■ Trust



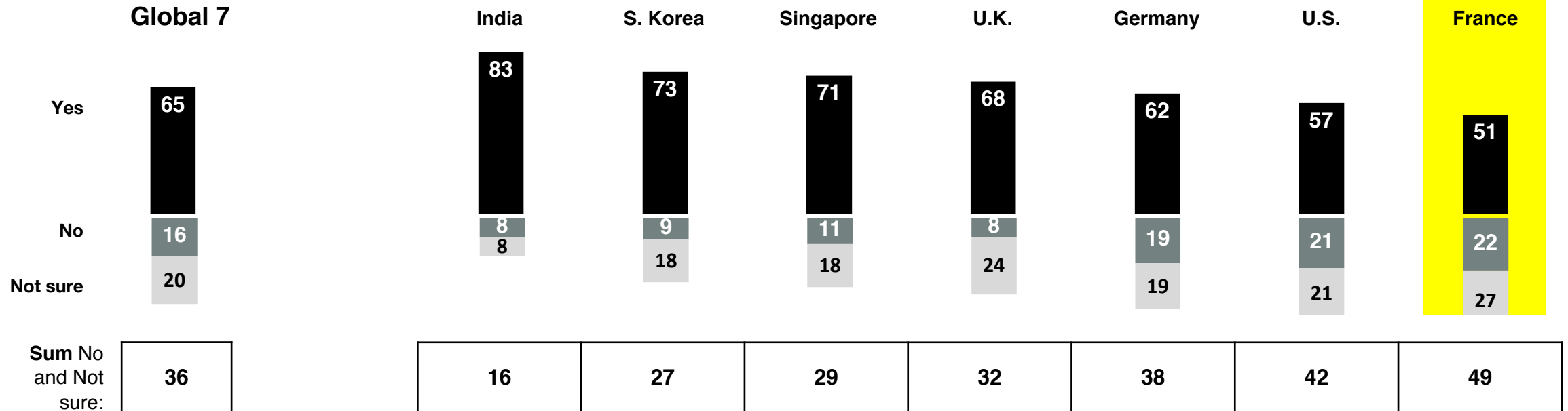
Sub-sectors	2015	2016	2017	2018	2019	Jan 2020	May 2020
Hospitals	65	72	72	72	73	73	81
Pharmaceutical companies	54	55	56	54	59	58	73
Biotech	59	62	64	62	65	65	71
Health insurance	57	60	61	63	66	65	69

EFFECTIVE VACCINATION IS A HOPE, WHICH MAY EXPLAIN INCREASING TRUST IN PHARMA. HOWEVER RECEPTIVITY IS ESPECIALLY MIXED IN FRANCE

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

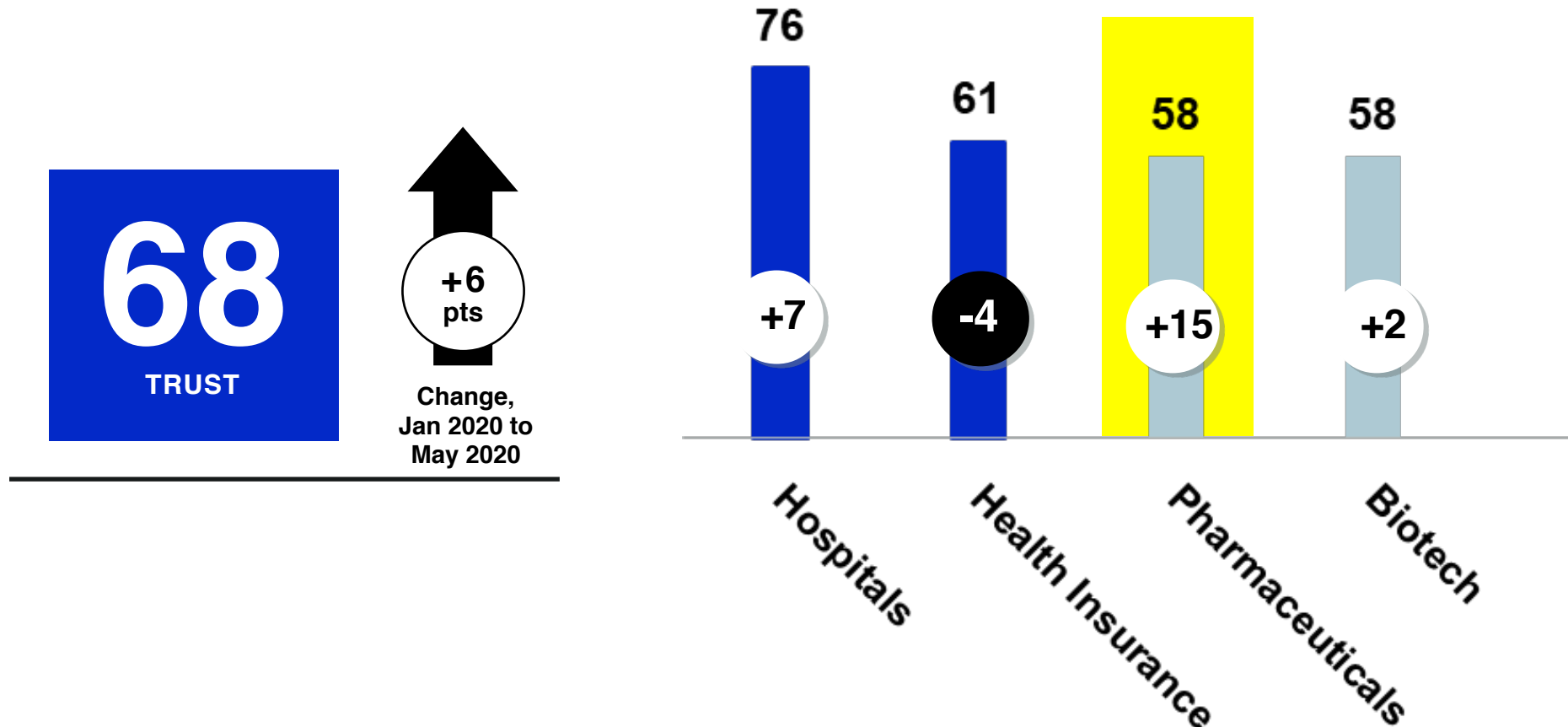
Not sure / Don't know No Yes

Percent who say yes, no or not sure



AS A CONSEQUENCE, WE SEE THE HIGHEST BOOST FOR PHARMA. BUT IT DOES NOT REACH THE TRUSTED ZONE YET

Percent trust in hospitals/clinics



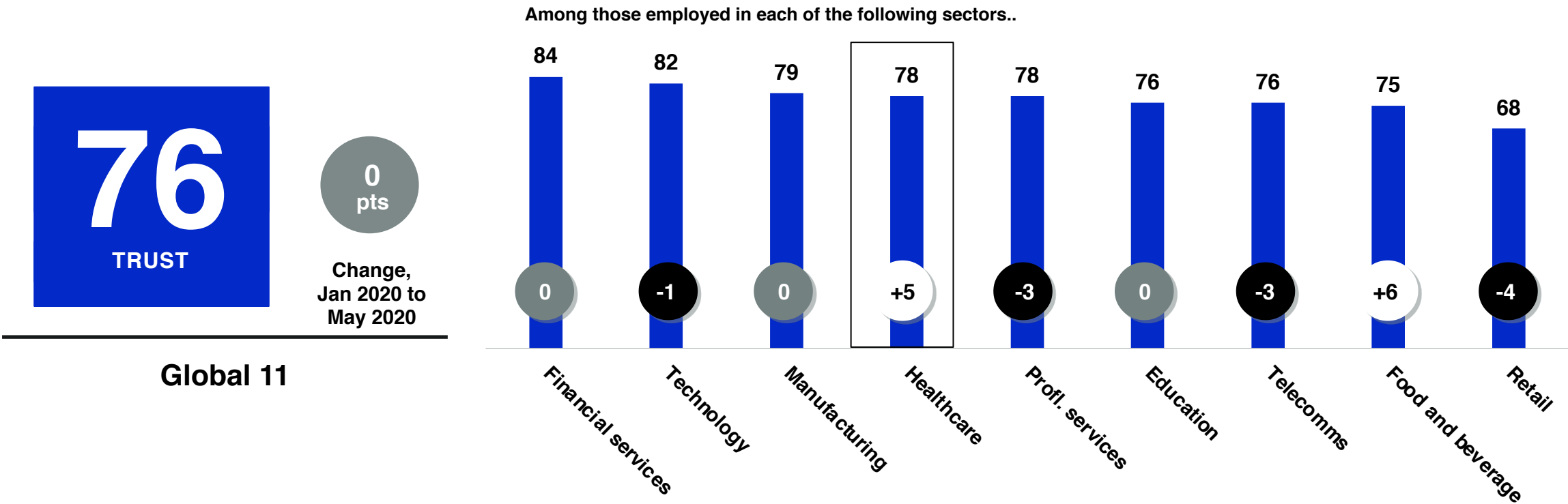
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**SAFEGUARDING TRUST IN HEALTH:
PARTNER WITH EMPLOYEES**

└

HEALTHCARE EMPLOYER TRUST ADVANTAGE GROWS DURING COVID-19 CRISIS

Percent trust in my employer among sector employees



WHILE STILL QUITE HIGH, FEAR OF JOB LOSS IS LOWER AMONGST HEALTHCARE EMPLOYEES

Percent of employees and job seekers who agree

I am very concerned about **job loss due to the pandemic** and not being able to find a new job for a very long time

Global

56%

↓

Healthcare
Employees

47%

HEALTHCARE EMPLOYERS MEETING EMPLOYEES' EXPECTATIONS DURING PANDEMIC...

Percent of healthcare employees who agree

My employer is well-prepared for this viral outbreak

⊥
59%

Percent of healthcare employees that say their employer is performing well or very well on the below

My employer is meeting my overall expectations for how they should be responding in this crisis

⊥
58%

2020 Edelman Trust Barometer Spring Update. LOC_PREP. 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. Attribute asked among employees (Q43/1). PER_EMP. When it comes to how your employer has performed thus far during the COVID-19 pandemic, how well do you believe it is currently doing each of the following? 5-point scale; top 2 box, doing well. Question asked among those who are employees (Q43/1). General population, 11-mkt avg among healthcare sector employees (Q43/1 AND Q420/9)

... BUT NOT NECESSARILY WHEN IT COMES TO ACTIONS THAT IMPACT THE BROADER COMMUNITY

Percent who say their employer is performing well or very well

My employer is taking care of people who are suffering pandemic-related financial hardships

⊥
46%

2020 Edelman Trust Barometer Spring Update. When it comes to how your employer has performed thus far during the COVID-19 pandemic, how well do you believe it is currently doing each of the following? 5-point scale; top 2 box, doing well. Among healthcare sector employees (Q43/1 AND Q420/9). General population, 11-mkt avg, among those who are employed, furloughed/laid off due to the pandemic or unemployed for other reasons (Q206/1,2,8-10). General population, 11-mkt avg.

MOREOVER, HEALTHCARE CEOS ARE TRUSTED BY THEIR EMPLOYEES, YET NOT SEEN AS DOING AN OUTSTANDING JOB

Percent of healthcare employees who say

I trust my CEO to tell the truth
about the virus and its progression

└
68%

My CEO did an outstanding job
meeting the demands
placed on them by the pandemic

└
29%

2020 Edelman Trust Barometer Spring Update. CV1_Q13. Please indicate how much you trust each of the following sources to tell you the truth about the virus and its progression. 9-point scale; top 4 box, trust. 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. Both attributes asked of those that are an employee (Q43/1). General population, 11-mkt avg, among healthcare sector employees (Q43/1 AND Q420/9). "All of the above" was added to "My CEO did an outstanding job meeting the demands placed on them by the pandemic."

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**SAFEGUARDING TRUST IN HEALTH:
TRUSTED INFORMATION**

T

WORRY ABOUT RELIABILITY OF CORONAVIRUS INFORMATION

Percent who agree

OPPORTUNITY FOR HEALTHCARE

I worry that there is **a lot of fake news** and false information being spread about the virus

It has been **difficult for me to find reliable and trustworthy information** about the virus and its effects

We need to hear **more from scientists** and less from politicians

⊥
67%
65%









⊥
49%
45%

⊥
75%

WHILE MAJOR NEWS ORGANIZATIONS ARE THE MAIN SOURCES OF INFORMATION...

AUGUST 2020

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

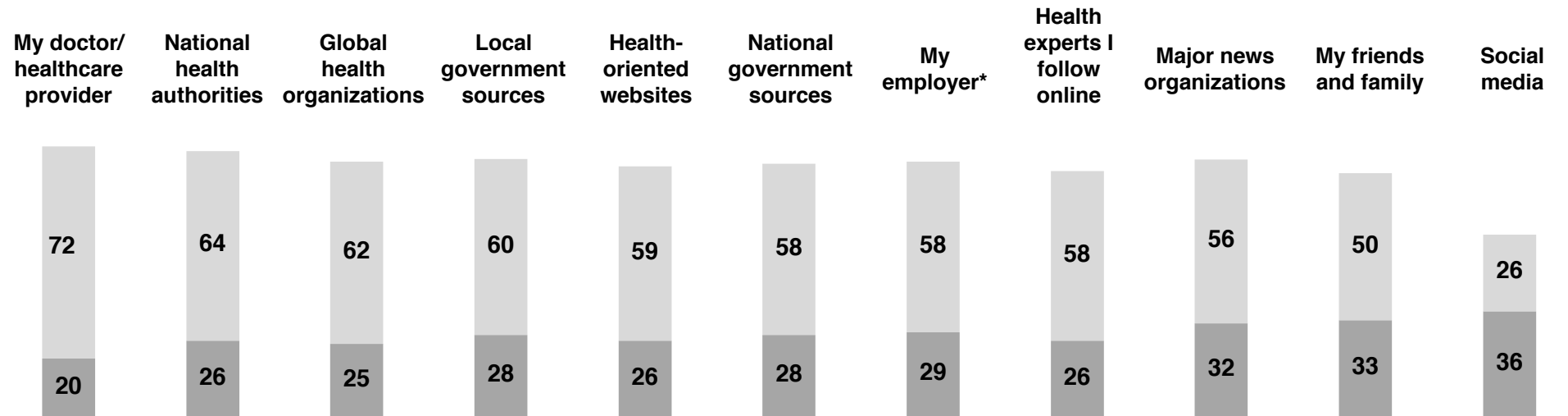
... YET HEALTH EXPERTS ARE TRUSTED MORE READILY

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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SAFEGUARDING TRUST IN HEALTH

1.

**Tangible action
is needed to
preserve trust
for the long term**

2.

**Lean into and
clearly explain
the science**

3.

**Be the source of
trustworthy
information,
shared across
multiple
platforms**

4.

**Partner with
employees and
address their
pandemic
concerns**

5.

**Healthcare must
be at the center
of larger,
societal change**

**La crise a été l'occasion de remettre au
cœur des sujets médiatiques**

l'ADN même des acteurs de la santé :

SOIGNER

**Une nouvelle histoire est déjà à écrire
autour d'une direction :**

HEALTH PACT

PROMOTION

OSER PRENDRE LA
PAROLE

ACTION

FAIRE DE LA
COMMUNICATION
UN LEVIER DU BIEN
COMMUN

COALITION

PORTER UNE
APPROCHE
COLLECTIVE

TRANSPARENCE

DIRE CE QUE VOUS FAITES

**PRODUCT
CENTRIC**

L'ère de la logique
« Nos produits sont meilleurs »

**PRODUCT + PATIENT
CENTRIC**

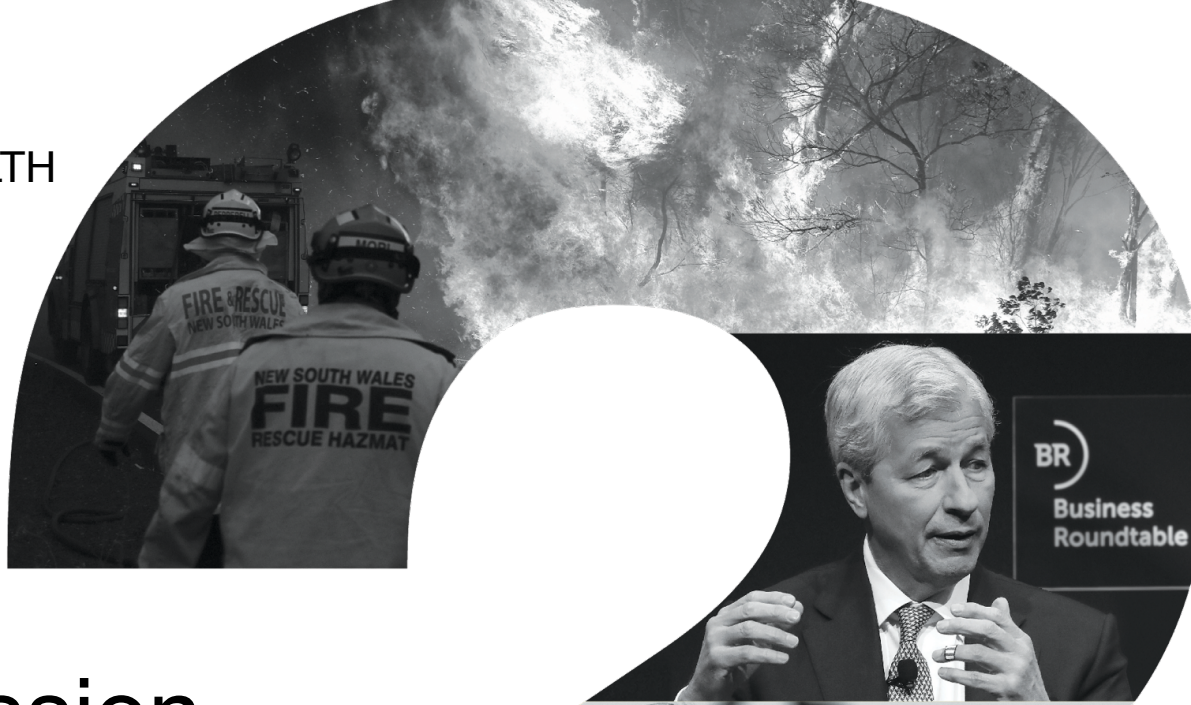
L'ère de l'émotion
« Nous vous comprenons
et nous vous aidons de la meilleure façon »

**PRODUCT + PATIENT + SOCIETY
CENTRIC**

L'ère de l'engagement
« Nous contribuons
à rendre le monde meilleur »

TRUST IN HEALTH

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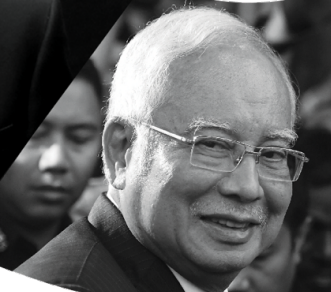


Q&A session



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Thanks

