



# 19<sup>th</sup> ANNUAL EDELMAN TRUST BAROMETER

## Methodology

Online Survey in 27 Markets

33,000+ respondents total

All fieldwork was conducted between  
October 19 and November 16, 2018

27-market global data margin of error: General population +/- 0.6% (N=31,050), informed public +/- 1.3% (N=6,000), mass population +/- 0.6% (N=26,000+), half-sample global general online population +/- 0.8 (N=15,525).

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 739, varies by market).

Employee MOE: 27-market = +/- 0.8% (N=16,944)

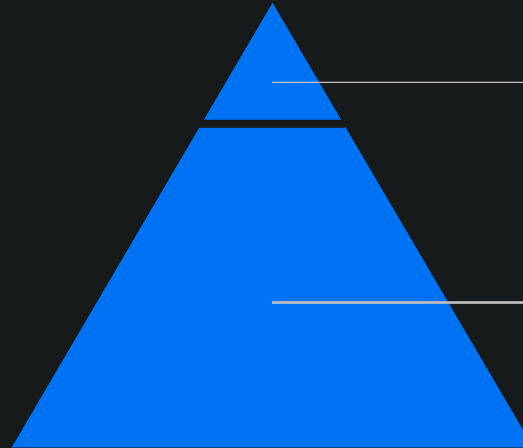
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market).

## General Online Population

1,150 respondents per market

Ages 18+

All slides show general online  
population data unless otherwise noted



## Informed Public

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

Represents 16% 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 84% of total global population

## 2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed)

Oversample of employees of multinational companies: 500 respondents per market

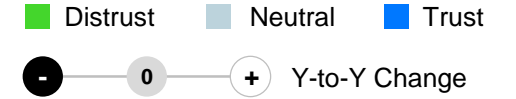




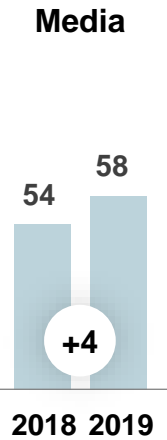
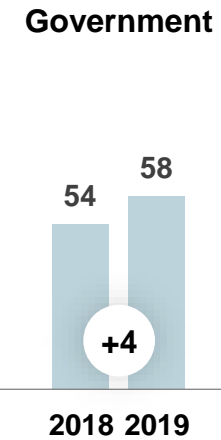
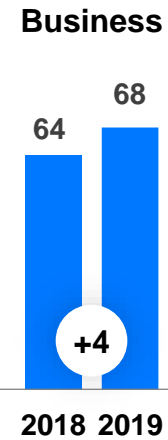
# A Modest Rise in Trust

# A MODEST RISE IN TRUST ACROSS INSTITUTIONS

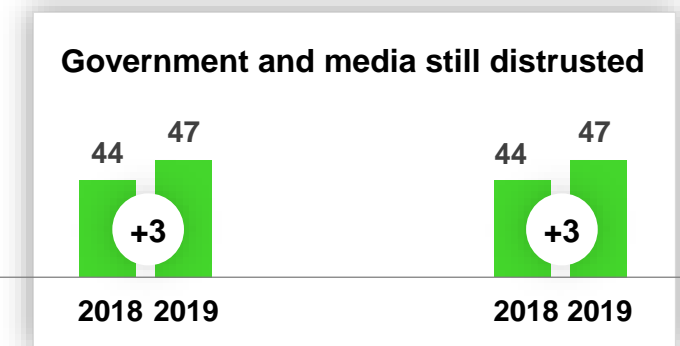
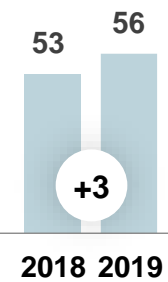
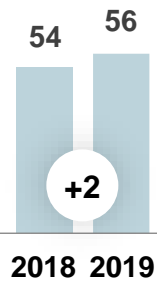
Percent trust



 Informed public



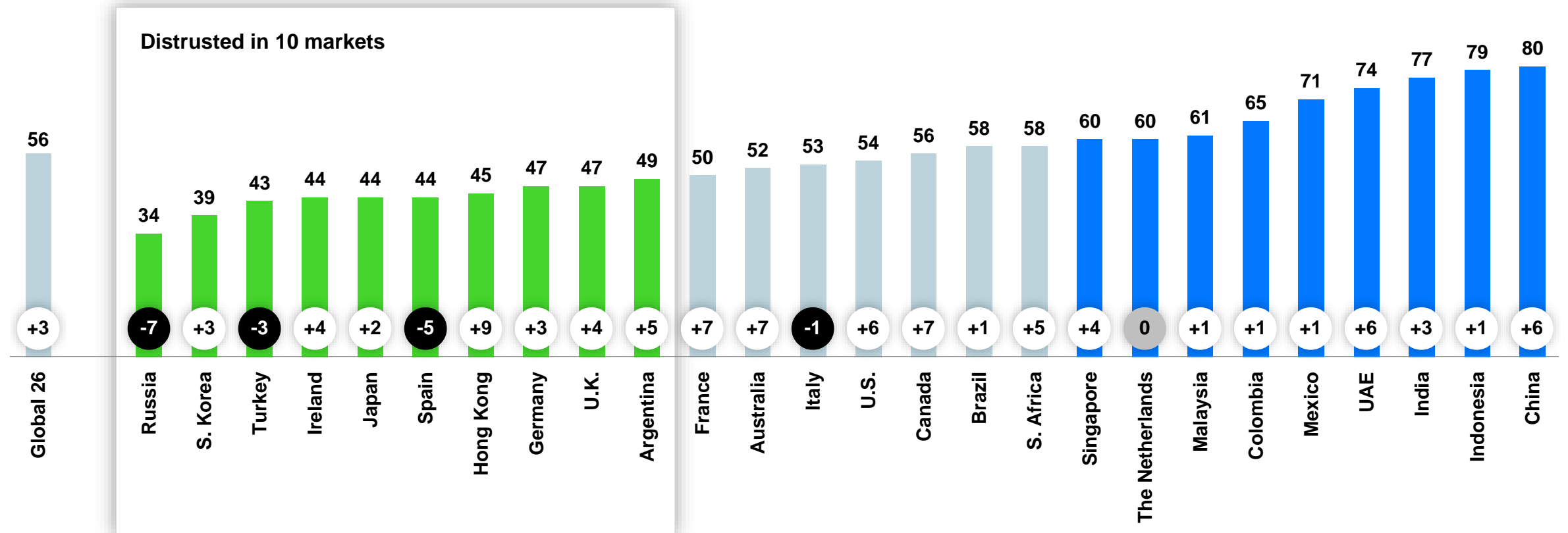
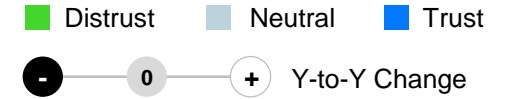
 General population





# TRUST IN BUSINESS INCREASES ACROSS 21 OF 26 MARKETS

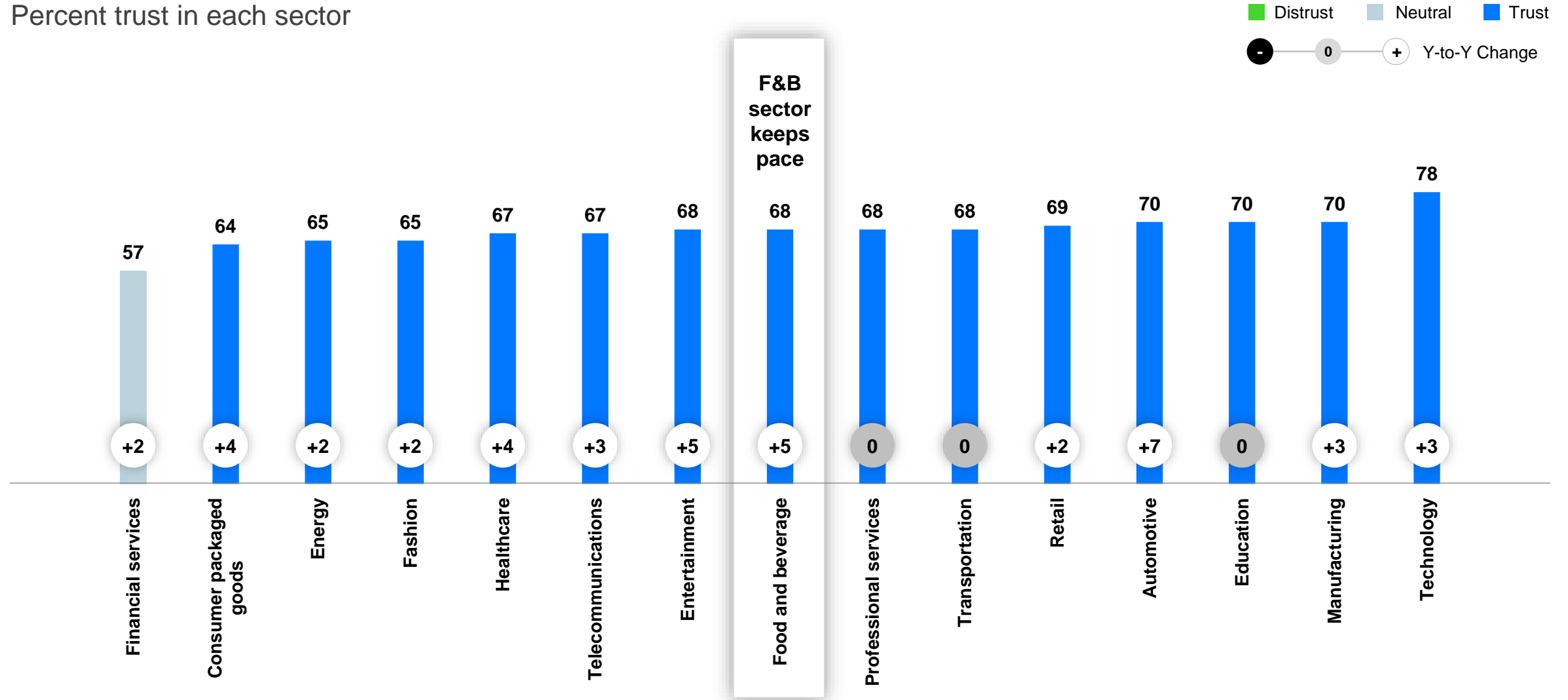
Percent trust in business



2019 Edelman Trust Barometer. 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 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.” 9-point scale; top 4 box, trust. General population, 26-market average.

# TRUST INCREASES ACROSS MOST SECTORS

Percent trust in each sector

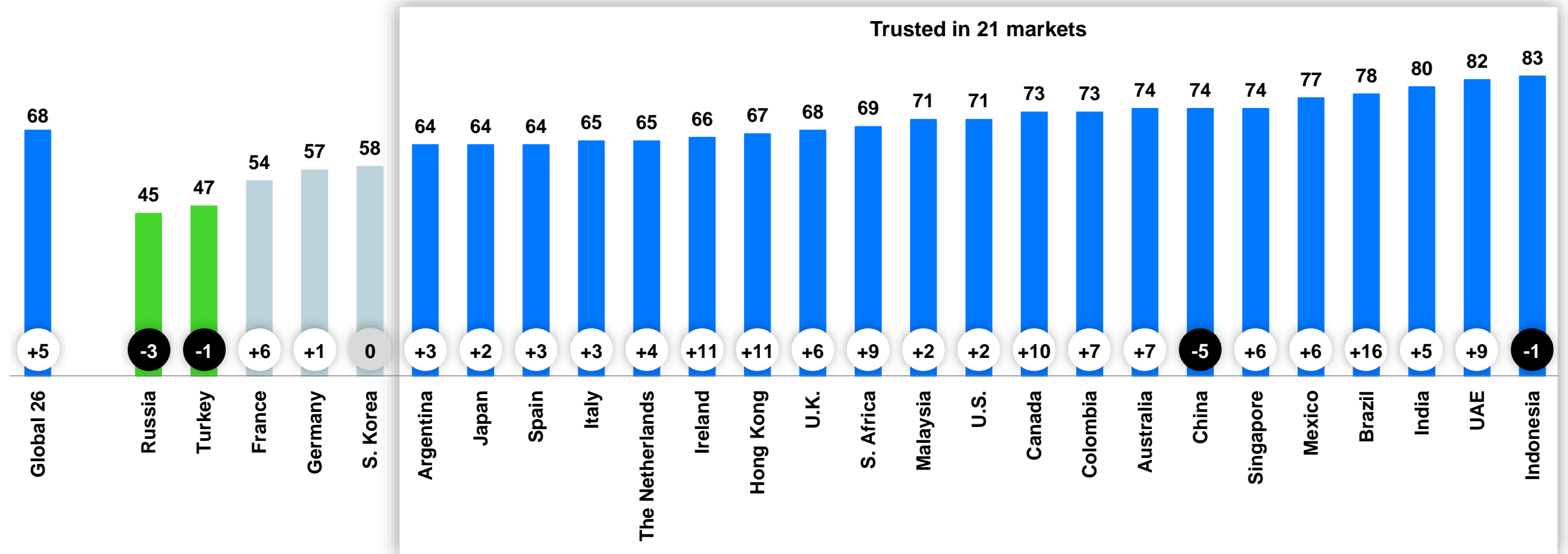


2019 Edelman Trust Barometer. TRU\_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

# TRUST IN FOOD AND BEVERAGE INCREASES IN 21 OF 26 MARKETS

Percent trust in food and beverage

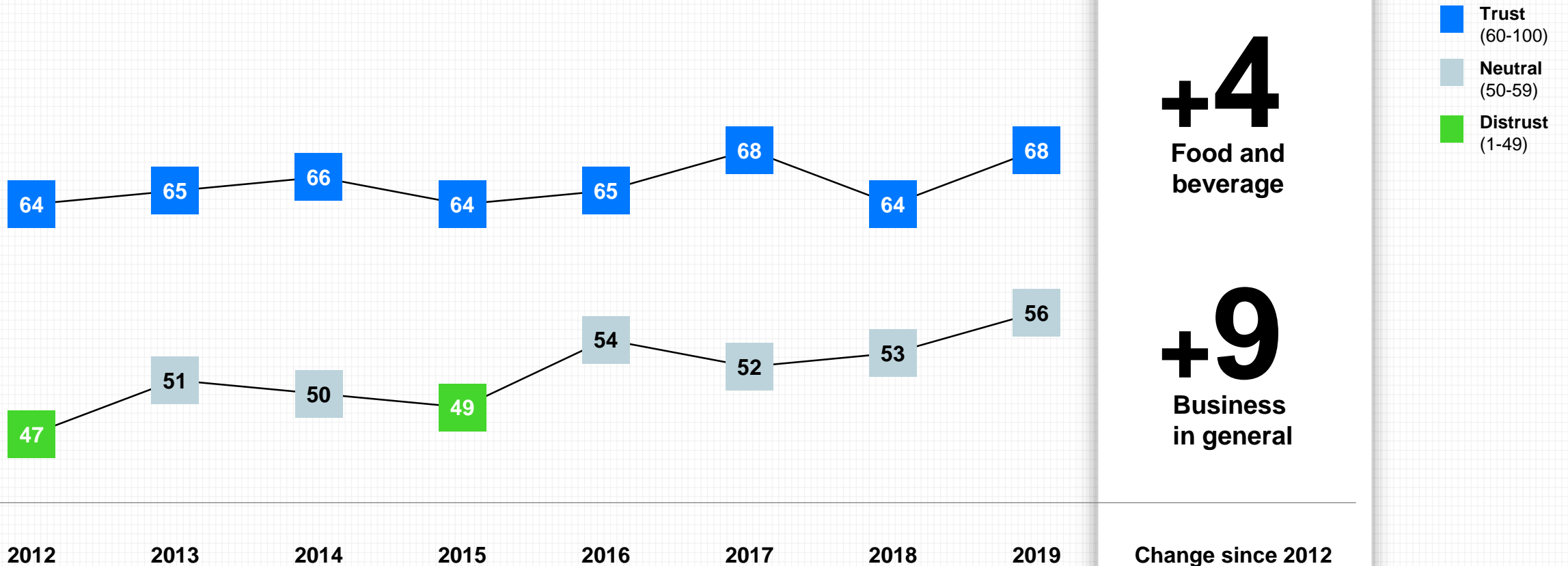
■ Distrust   
 ■ Neutral   
 ■ Trust  
- — 0 — + Y-to-Y Change



2019 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”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 26-market average.

# TRUST INCREASE FOR FOOD AND BEVERAGE NOT KEEPING PACE WITH TRUST INCREASE FOR BUSINESS

Percent trust



2019 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”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. 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.” 9-point scale; top 4 box, trust. General population, 23-market average.





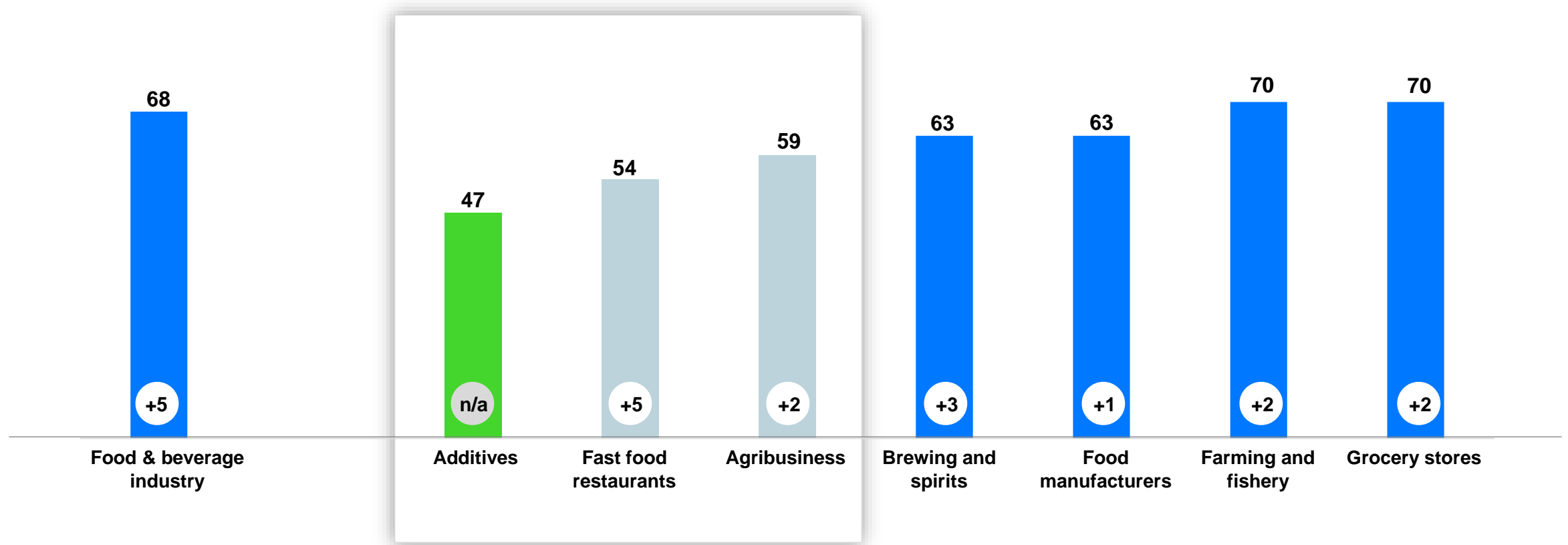
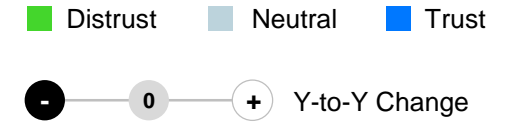
# Threats to the Food and Beverage Sector

## Behaviors and Actions Impacting Trust



# AGRIBUSINESS, ADDITIVES, FAST FOOD NOT TRUSTED

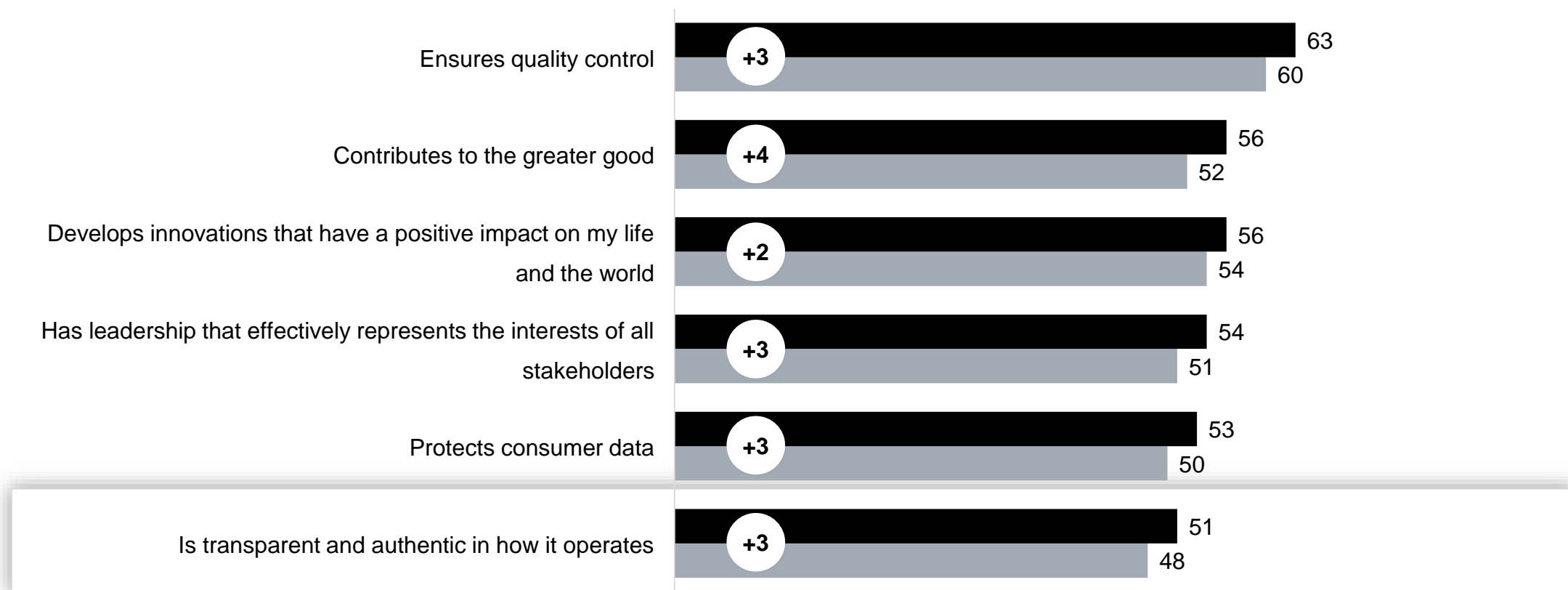
Percent trust



2019 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”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. TRU\_SUB\_FBV. Now thinking about specific sectors within the food industry, please indicate how much you trust businesses in each of the following sectors 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”. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 26-market average.

# QUESTIONS REMAIN ABOUT VALUES AND INTEGRITY

Performance of behaviors in building trust in the food & beverage sector



2019 Edelman Trust Barometer. DRV\_FBV\_GEN. How well do you think the food & beverage industry is performing on the behaviors listed below? Use a 9-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. 9-point scale; top 4 box, performing well. Question asked of one-fifth of the sample. General population, 24-market average (excluding BR, MY and KSA).

# UNCERTAIN THAT SECTOR IS PROVIDING LEADERSHIP TODAY OR FOR FUTURE

Percent who agree

Large-scale food and beverage production has helped to reduce hunger and made more foods available to more people

53%

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I worry that the food and beverage industry does not have a plan for producing enough food to keep up with the surge in population growth predicted over the next 20 years

55%

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2019 Edelman Trust Barometer. DRV\_FBV\_POL. For each of the statements below, please indicate how much you agree or disagree. 9-point scale; top 4 box, agree. Question asked of one-fifth of the sample. General population, 27-market average.



# CONCERNS ABOUT SECTOR IMPACT ON ENVIRONMENT AND HEALTH

Percent who agree

Large-scale food and beverage production has harmed the environment and lowered nutritional standards

65%

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70%

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Unless the food and beverage industry is forced to change its priorities, people's diets are going to become progressively less healthy over the next decade

# FOOD AND BEVERAGE EMPLOYEES SHARE CONCERNS ABOUT SECTOR LEADERSHIP

Percent who agree

Large-scale food and beverage production has helped to reduce hunger and made more foods available to more people

I worry that the food and beverage industry does not have a plan for producing enough food to keep up with the surge in population growth predicted over the next 20 years

Global

53%

55%

Food and beverage employees

58%

53%

Food and beverage managers and above

66%

51%

# FOOD AND BEVERAGE EMPLOYEES SHARE CONCERNS ABOUT ENVIRONMENT AND HEALTH

Percent who agree

Large-scale food and beverage production has harmed the environment and lowered nutritional standards

Unless the food and beverage industry is forced to change its priorities, people's diets are going to become progressively less healthy over the next decade

Global

65%

70%

Food and beverage employees

63%

66%

Food and beverage managers and above

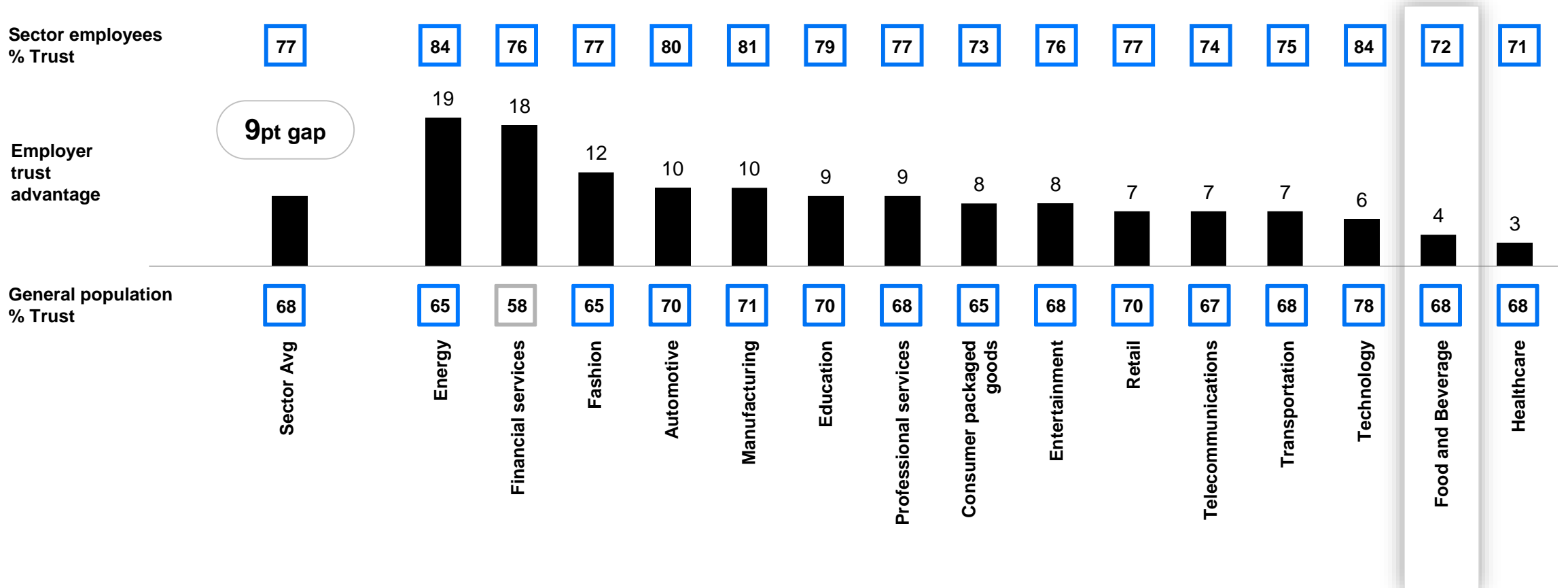
60%

68%

# ALMOST NO EMPLOYER TRUST ADVANTAGE FOR FOOD AND BEVERAGE SECTOR

■ Distrust ■ Neutral ■ Trust

Gap between trust in each sector, comparing trust among those employed in the sector to the general population



2019 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”. 9-point scale; top 4 box, trust. Industries asked of half of the sample. General population, 27-market average. Sector employee data is among those employed in each sector, but not self employed (Q420/1-18 AND Q43/1 AND NOT Q28/7).



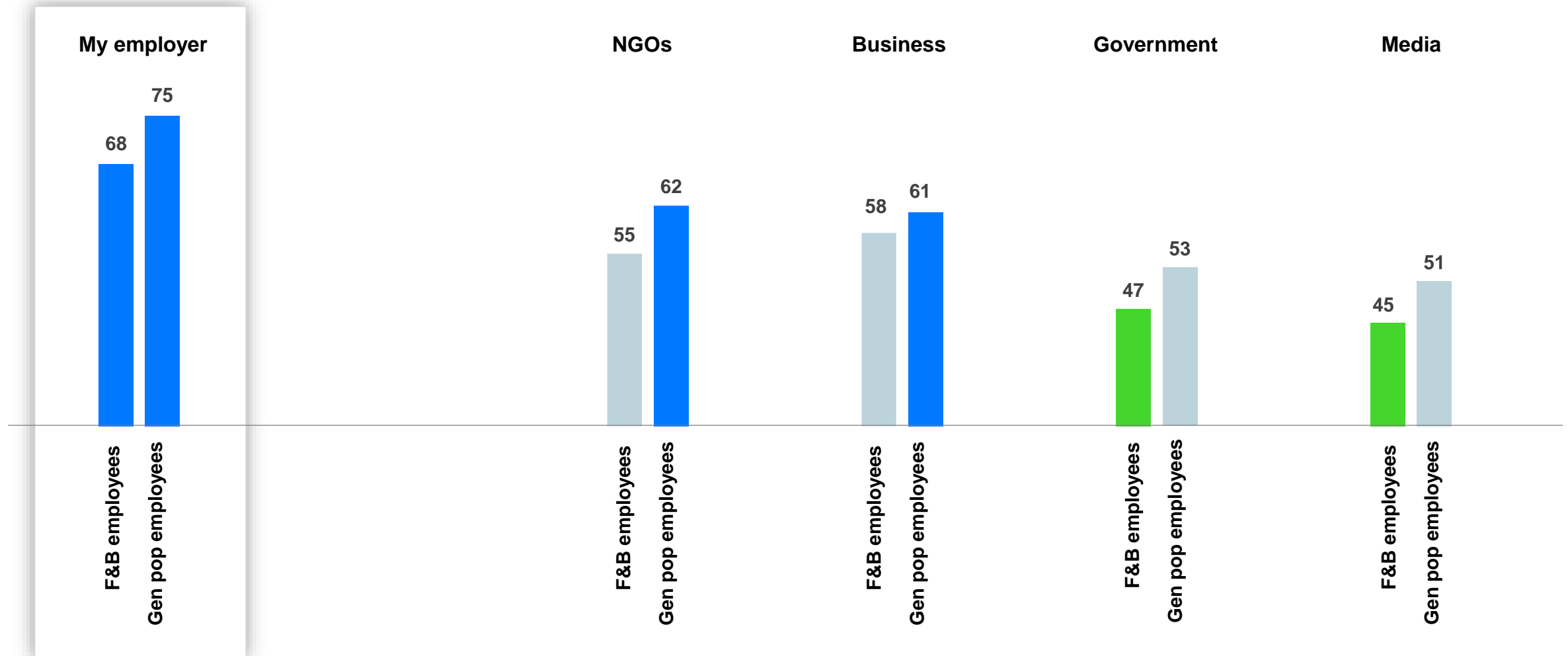


# Building Trust from the Inside-Out

# MY EMPLOYER MOST-TRUSTED RELATIONSHIP

Percent trust

■ Distrust ■ Neutral ■ Trust



2019 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.” 9-point scale; top 4 box, trust. “Your employer” asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population employees and employees working in the food and beverage sector (Q420/8), 27-market average.



# FEARS OF JOB LOSS REMAIN HIGH

Percent of employees who worry about job loss due to each issue

Not having the **training** and skills necessary to get a good paying job

**Automation** and/or other innovations taking your job away

International conflicts about **trade policies** and **tariffs** hurting the company you work for

All employees

59%

55%

57%

Multinational employees

63%

60%

64%

2019 Edelman Trust Barometer. POP\_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? Please indicate your answer using a nine-point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". 9-point scale; top 4 box, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, 27-market average.

# FEARS OF JOB LOSS SHARED BY SECTOR EMPLOYEES

Percent of food and beverage employees who worry about job loss due to each issue

Not having the **training** and skills necessary to get a good paying job

**Automation** and/or other innovations taking your job away

International conflicts about **trade policies** and **tariffs** hurting the company you work for

Food and beverage employees

59%

51%

55%

Food and beverage managers and above

63%

58%

61%

2019 Edelman Trust Barometer. POP\_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? Please indicate your answer using a nine-point scale where one means "I do not worry about this at all" and nine means "I am extremely worried about this". 9-point scale; top 4 box, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). Employees working in the food and beverage sector (Q420/8) and managers+ working in the food and beverage sector (Q420/8 AND Q421/1-5), 27-market average.



# LOOKING FOR LEADERSHIP FROM MY EMPLOYER

**71%**

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**of employees agree It's critically important for my CEO to respond to challenging times**

- **Industry issues**
- **Political events**
- **National crisis**
- **Employee-driven issues**

**73%**

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**of food and beverage employees agree**

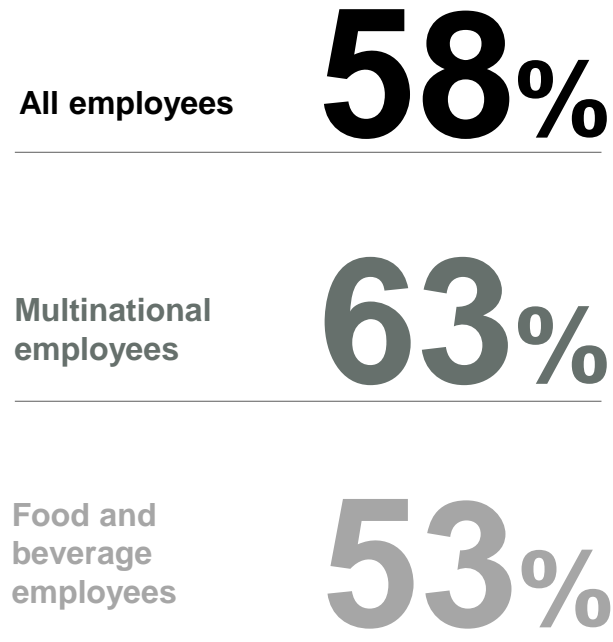
**2019 Edelman Trust Barometer. CEO\_DIR.** On which of the following occasions do you believe it is critically important to hear directly from the CEO or head of the organization you work for? Pick all that apply. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and employees working in the food and beverage sector (Q420/8), 27-market average.

Data shown is a net of "when there is major news or an event that affects our industry or sector," "when there is a major social or political event that affects our country," "when there is a crisis in the country," and "when employees demand that the CEO publicly take a stand on an important issue".

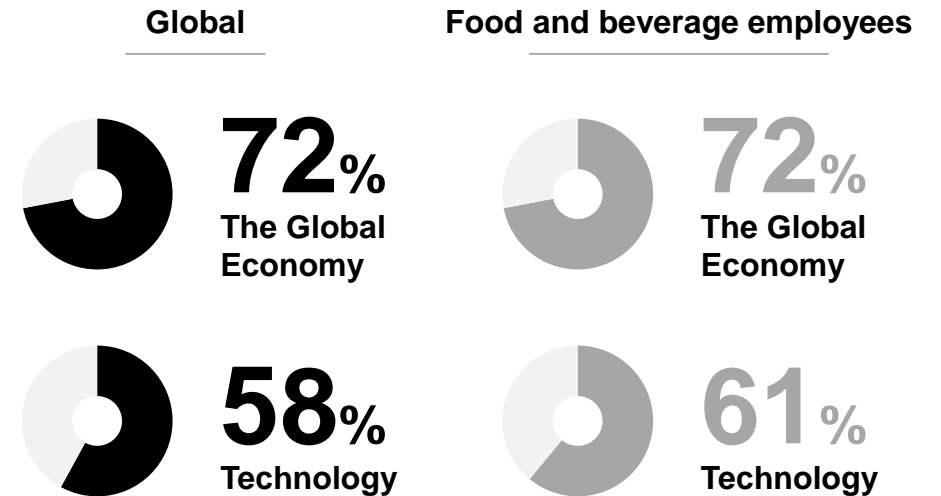
# EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

Percent who agree

I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**



Employees see business as trustworthy source on:



2019 Edelman Trust Barometer. EMP\_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, multinational employees and employees working in the food and beverage sector (Q420/8), 27-market average. BUS\_SRC. Below is a list of topics and social issues. Please indicate about which of the following you believe business in general to be a trustworthy information source. Pick all that apply. Question asked of half of the sample. General population employees (Q43/1 AND NOT Q28/7) and employees working in the food and beverage sector (Q420/8 AND Q43/1 AND NOT Q28/7), 27-market average.

“The Economy” is a net of BUS\_SRC/3,7,8,9,10; “Technology” is a net of BUS\_SRC/2,5,6,11.

# F&B EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

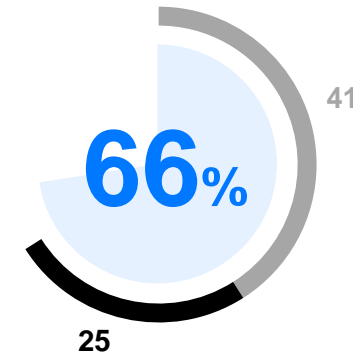
Percent of employees who expect each from a prospective employer

- Strong expectation**  
You would have to **pay me a lot more** to work for an organization that does not offer this
- Deal breaker**  
I would **never** work for an organization that does not offer this

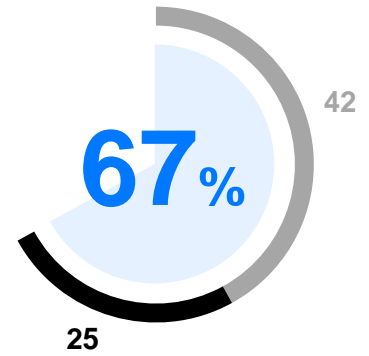
## Shared Action

My employer has a greater purpose, and my job has a meaningful societal impact

Food and beverage employees

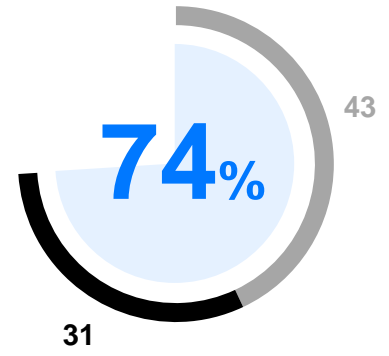
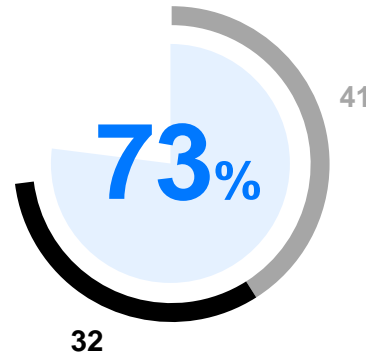


All employees



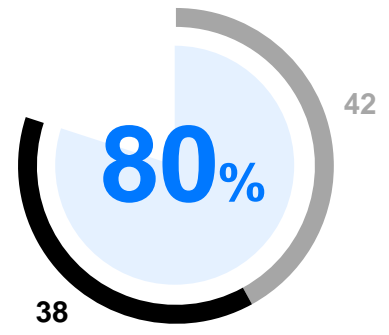
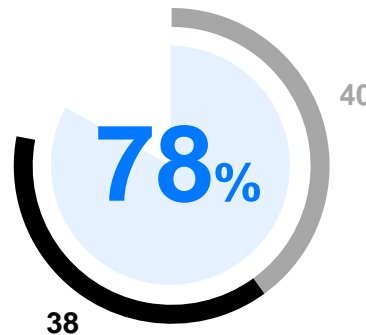
## Personal Empowerment

I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



## Job Opportunity

My employer offers wage growth, training, career growth and work which I find interesting & fulfilling



2019 Edelman Trust Barometer. EMP\_IMP. When considering an organization as a potential place of employment, how important is each of the following to you in deciding whether or not you would accept a job offer there? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and employees working in the food and beverage sector (Q420/8), 27-market average. Buckets are the sum of the average of codes 1 & 2 for the items that make up each dimension. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.

# TRUST CEMENTS THE EMPLOYER-EMPLOYEE PARTNERSHIP

Percent of food and beverage employees who engage in these types of behaviors on behalf of their employer



2019 Edelman Trust Barometer. EMP\_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). Food and beverage employees (Q420/8), 27-market average, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99). TRU\_INS. [YOUR EMPLOYER] 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”. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). Food and beverage employees (Q420/8), 27-market average. Advocacy is an average of (EMP\_ENG/3-5); Loyalty is an average of (EMP\_ENG/1-2); Engagement is an average of (EMP\_ENG/10-15); Commitment is an average of (EMP\_ENG/6-9). See the tech appendix for a complete list of the items that went into each employee KPI dimension.





# Activate Your Employees Voice

# PARTNER WITH TRUSTING EMPLOYEES TO ENGAGE THE DISTRUSTERS

Percent of food and beverage employees who say they obtain information about what is happening in their organization from each source, comparing those who trust and those who do not trust their employer

■ Trust employer  
■ Do not trust employer



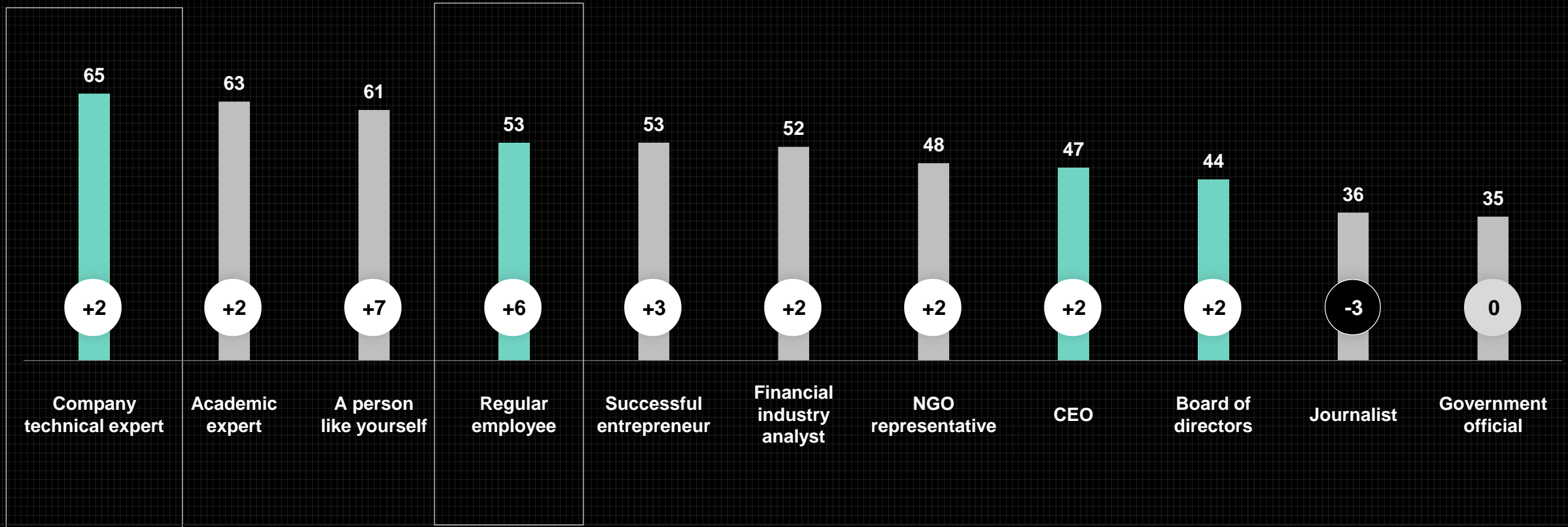
Employees who do not trust less likely to turn to company sources

2019 Edelman Trust Barometer. EMP\_HAP. How do you typically find out about what is really happening within your organization? Pick all that apply. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). Employees working in the food and beverage sector (Q420/8), 27-market average, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99).

# ACTIVATE EMPLOYEE VOICES

Percent who rate each source as very/extremely credible

■ Company voices  
 ○ - 0 + Y-to-Y Change



2019 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. 4-point scale; top 2 box, credible. Question asked of half of the sample. General population, 26-market average.

# INVESTING IN EMPLOYEE TRUST IS INVESTING IN YOUR BOTTOM LINE

How a company treats its employees is one of the best indicators of its level of trustworthiness

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78%

Percent who agree that “a good reputation may get me to try a product, but unless I come to trust the company behind the product, I will soon stop buying it”

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67%



# **BUILDING TRUST WITH ALL STAKEHOLDERS**

- 1    UNDERSCORE YOUR CONTRIBUTION FOR THE GREATER GOOD**
- 2    BE TRANSPARENT AND AUTHENTIC**
- 3    ENGAGE THE CEO IN LEADING WITH PURPOSE**
- 4    ENGAGE YOUR EMPLOYEES AND ACTIVATE THEIR VOICES**