Global Report

Trust in the Food & Beverage Sector

Edelman Trust Barometer 2022

2022 EDELMAN TRUST BAROMETER

Methodology

Annual online survey in its 22nd year

Fieldwork conducted: **Nov 1 – Nov 24, 2021**

28
countries

36,000+
respondents

1,150+
respondents/country

GLOBAL AVERAGES vary based on the number of countries surveyed each year:

GLOBAL 27 does not include Nigeria*

GLOBAL 22 does not include Colombia, Kenya, Nigeria, Saudi Arabia, S. Africa and Thailand

GLOBAL 24 Not asked in China, Russia, Thailand

the sensitive nature of the question prevented this data from being collected in these markets

Other global averages detailed in technical appendix

*To prevent skewing the global results, Nigeria is not included in any global averages because the online population is not representative of the true population

Argentina
Australia
Brazil
Canada
China
Colombia
France
Germany
India
Indonesia
Ireland
Italy
Japan
Kenya
Malaysia
Mexico
Nigeria
Russia
Saudi Arabia
Singapore
S. Africa
S. Korea
Spain
Thailand
The Netherlands
UAE
UK
U.S.

27-market global data margin of error: General population +/- 0.6% (n=31,050); half-sample global general online population +/- 0.8% (n=15,525).
Country-specific data margin of error: General population +/- 2.9% (n=1,150); half-sample +/- 4.1% (n=575).

22 YEARS OF TRUST

'01	'02	'03	'04	'05	'06	'07	'08	'09	'10	'11
Rising Influence of NGOs	Fall of the Celebrity CEO	Earned Media More Credible Than Advertising	U.S. Companies in Europe Suffer Trust Discount	Trust Shifts from "Authorities" to Peers	A "Person Like Me" Emerges as Credible Spokesperson	Business More Trusted Than Government and Media	Young People Have More Trust in Business	Trust in Business Plummets	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust

| '12	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22
Fall of Government	Crisis of Leadership	Business to Lead the Debate for Change	Trust is Essential to Innovation	Growing Inequality of Trust	Trust in Crisis	The Battle for Truth	Trust at Work	Trust: Competence and Ethics	Business Most Trusted	**The Cycle of Distrust**

IN A DIVIDED AND DIVISIVE WORLD, BUSINESS MOST TRUSTED

# TRUST DECLINES FOR GOVERNMENT AND MEDIA; BUSINESS STILL ONLY TRUSTED INSTITUTION

Percent trust

Global 27

Distrust (1-49) · Neutral (50-59) · Trust (60-100) | Change, 2021 to 2022

Business	NGOs	Government	Media
61	59	52	50
0	+2	-1	-1

IN MAY 2020, GOVERNMENT MOST TRUSTED

Global 11

Government	Business	NGOs	Media
65	62	62	56

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# GOVERNMENT AND MEDIA SEEN AS DIVISIVE

Percent who say

These institutions are…

Gap,
difference between
unifying force vs.
dividing force

| ■—□ |
| a **dividing** | a **unifying** |
| **force** in society | **force** in society |

-12pts   **-11**pts   **14**pts   **21**pts

Government: 48 / 36
Media: 46 / 35
Business: 31 / 45
NGOs: 29 / 50

Government   Media   Business   NGOs

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NEWS SOURCES FAIL TO FIX THEIR TRUST PROBLEM

Percent trust

Global 22

	Search engines	Traditional media	Owned media	Social media

Distrust Neutral Trust   - 0 + Change, 2012 to 2022

59 **57** **43** **37**

Change, 2012 to 2022 **-3** **-5** **+1** **-8**

Least-trusting countries for each source

Search engines		Traditional media		Owned media		Social media	
U.S.	45	Russia	35	S. Korea	24	France	19
Australia	47	Japan	39	Russia	28	Germany	20
Japan	47	S. Korea, U.S.	43	U.S.	28	Canada	21

FAKE NEWS CONCERNS AT ALL-TIME HIGHS

Percent who agree

— —(0)—(+) Change, 2021 to 2022

▲ All-time high in
13 of 27 countries

I worry about **false information or fake news** being used as a weapon
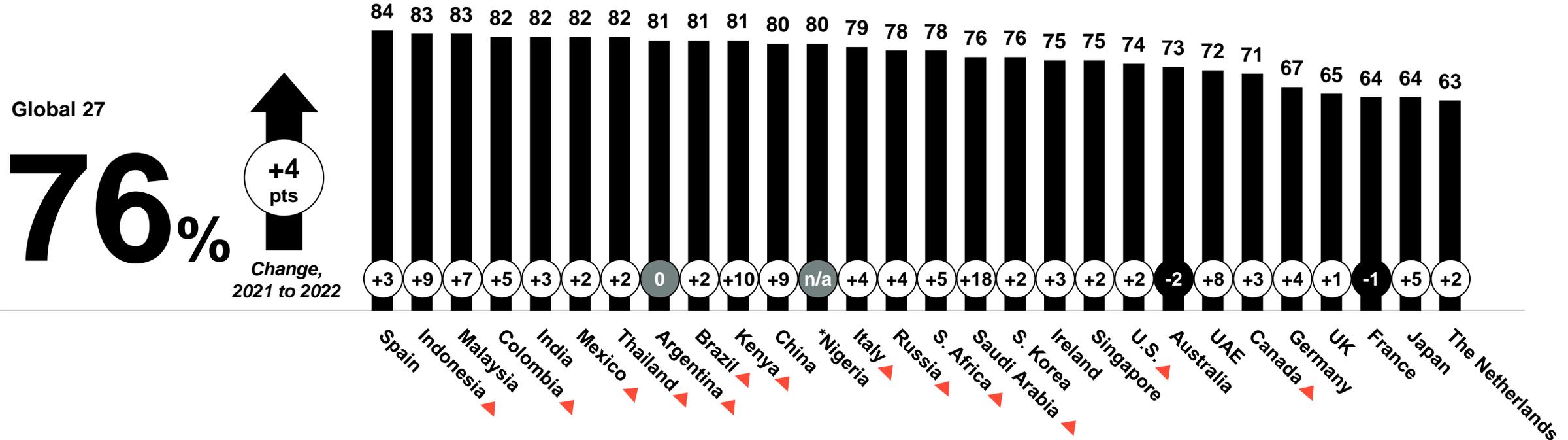
Global 27

76%

↑ **+4 pts**

Change, 2021 to 2022

| Country	%	Change
Spain	84	+3
Indonesia	83	+9
Malaysia	83	+7
Colombia	82	+5
India	82	+3
Mexico	82	+2
Thailand	82	+2
Argentina	81	0
Brazil	81	+2
Kenya	81	+10
China	80	+9
*Nigeria	80	n/a
Italy	79	+4
Russia	78	+4
S. Africa	78	+5
Saudi Arabia	76	+18
S. Korea	76	+2
Ireland	75	+3
Singapore	75	+2
U.S.	74	+2
Australia	73	-2
UAE	72	+8
Canada	71	+3
Germany	67	+4
UK	65	+1
France	64	-1
Japan	64	+5
The Netherlands	63	+2

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GOVERNMENT NOT SEEN AS ABLE TO SOLVE SOCIETAL PROBLEMS

Percent who say each is a strength of institutions

Take a leadership role

Coordinate cross-institutional efforts to solve societal problems

Majority do not see as strength

50%

Business 55
NGOs 55
Media 45
Government 44
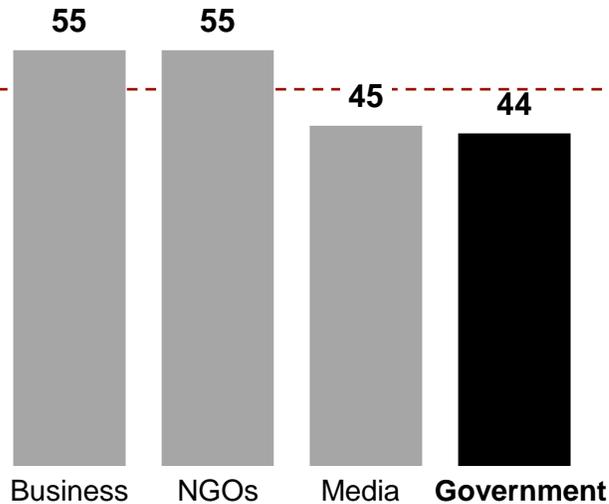
Get results

Successfully execute plans and strategies that yield results

Business 65
NGOs 57
Media 48
Government 42
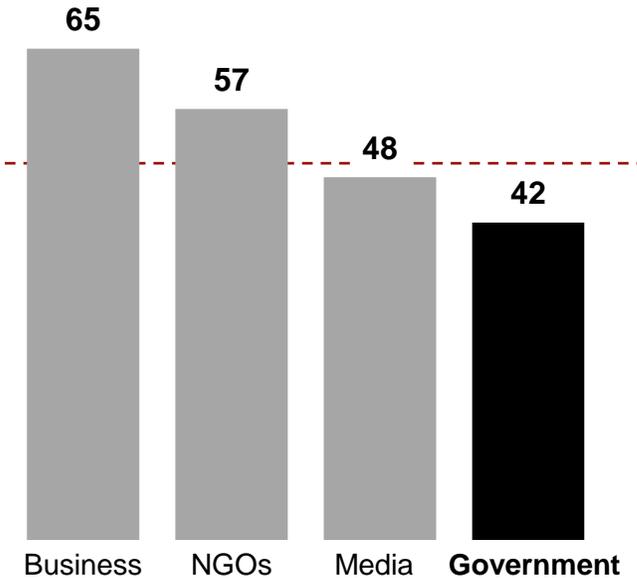
SOCIETAL LEADERS NOT TRUSTED

Percent trust
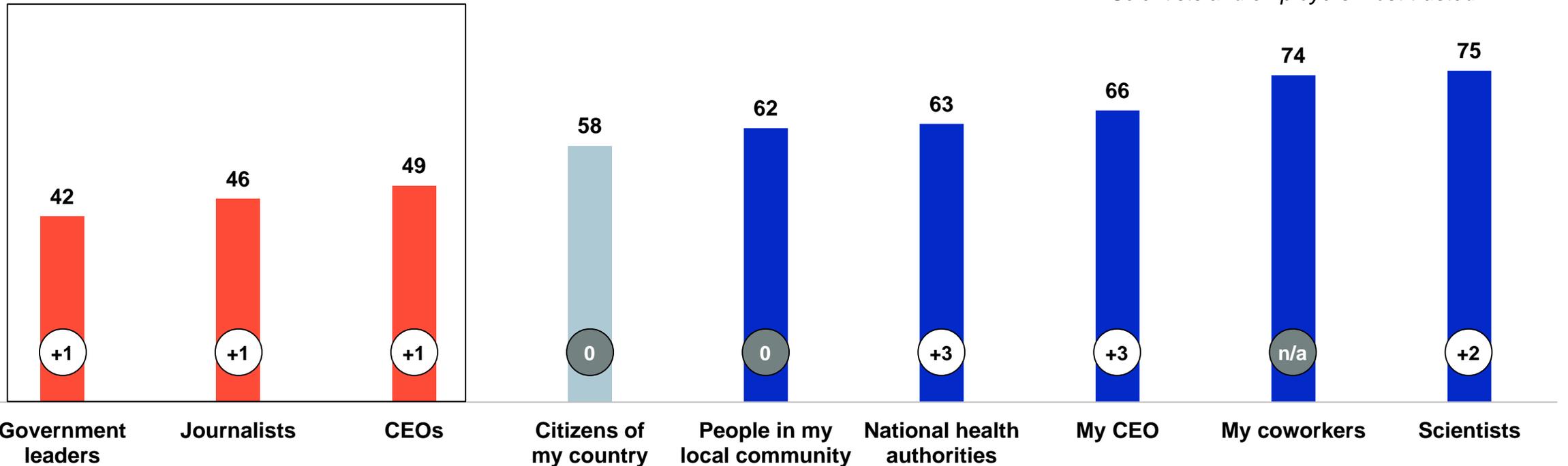
Distrust   Neutral   Trust   Change, 2021 to 2022

Scientists and employers most trusted

42	46	49	58	62	63	66	74	75
+1	+1	+1	0	0	+3	+3	n/a	+2
Government leaders	Journalists	CEOs	Citizens of my country	People in my local community	National health authorities	My CEO	My coworkers	Scientists

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MORE CONVINCED WE'RE BEING LIED TO BY SOCIETAL LEADERS

Percent who worry

67% +8 pts ↑
Journalists and reporters

66% +9 pts ↑
**My country's government leaders**

63% +7 pts ↑
Business leaders

are **purposely trying to mislead people** by
saying things they know are false or gross exaggerations

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CYCLE OF DISTRUST THREATENS SOCIETAL STABILITY

Government and media feed cycle of division and disinformation for votes and clicks

NGOs and business pressured to take on societal problems beyond their abilities

DIVISION

BUSINESS

Climate change

GOVERNMENT

SOCIETAL INSTABILITY

MEDIA

Discrimination

Job loss

Income inequality

NGOs

DISINFORMATION
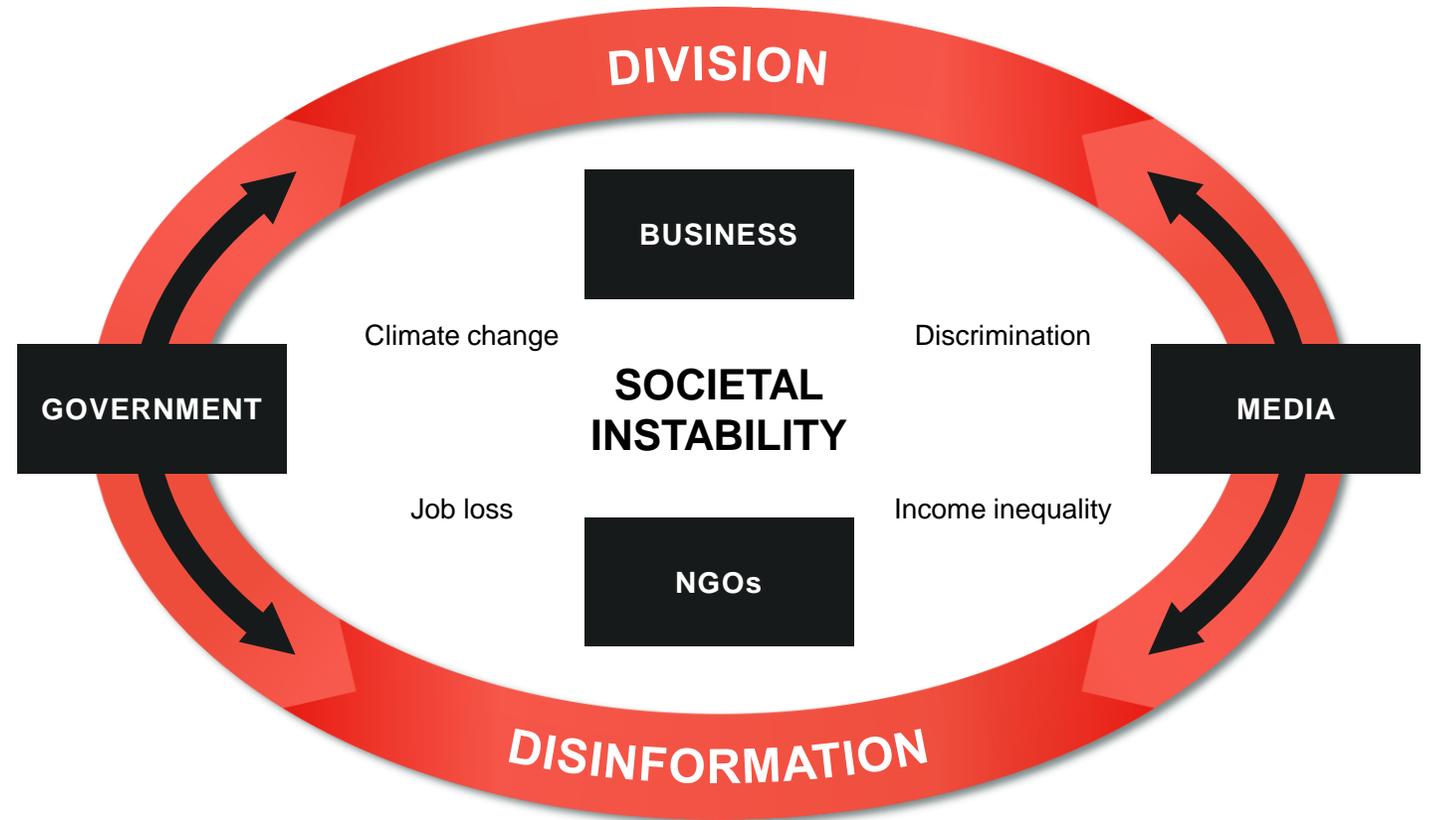
TRUST IN FOOD AND BEVERAGE FACES HEADWINDS

A COMPLEX AND CONFLICTED LANDSCAPE

Food Justice = Social Justice

> **CIVIL EATS**
>
> Does Regenerative Agriculture Have a Race Problem?

> **The Seattle Times**
>
> The Right to Food Movement: Fighting Hunger is About Justice, not Charity

> **FORTUNE**
>
> Fertilizer prices just hit a record high sparking fears of global starvation and the worst food insecurity level since World War II

Sustainability as Threat and Opportunity

> **FOOD navigator.com**
>
> PepsiCo more than doubles revenue growth with framework prioritizing sustainability

> **People**
>
> Almond Milk is Killing Billions of Honeybees

> **South China Morning Post**
>
> How China plans to lead the world in sustainable food with latest five-year agricultural development plan

## Runaway Inflation

> **THE WALL STREET JOURNAL.**
>
> Food Prices Keep Going Up, Here's What it Means for You

> **EL PAÍS**
>
> Los alimentos se encarecieron un 28% en 2021, hasta máximos desde los años setenta

> **CNN**
>
> War Has Brought the World to the Brink of a Food Crisis

TRUST INCREASES ACROSS MOST SECTORS

Percent trust
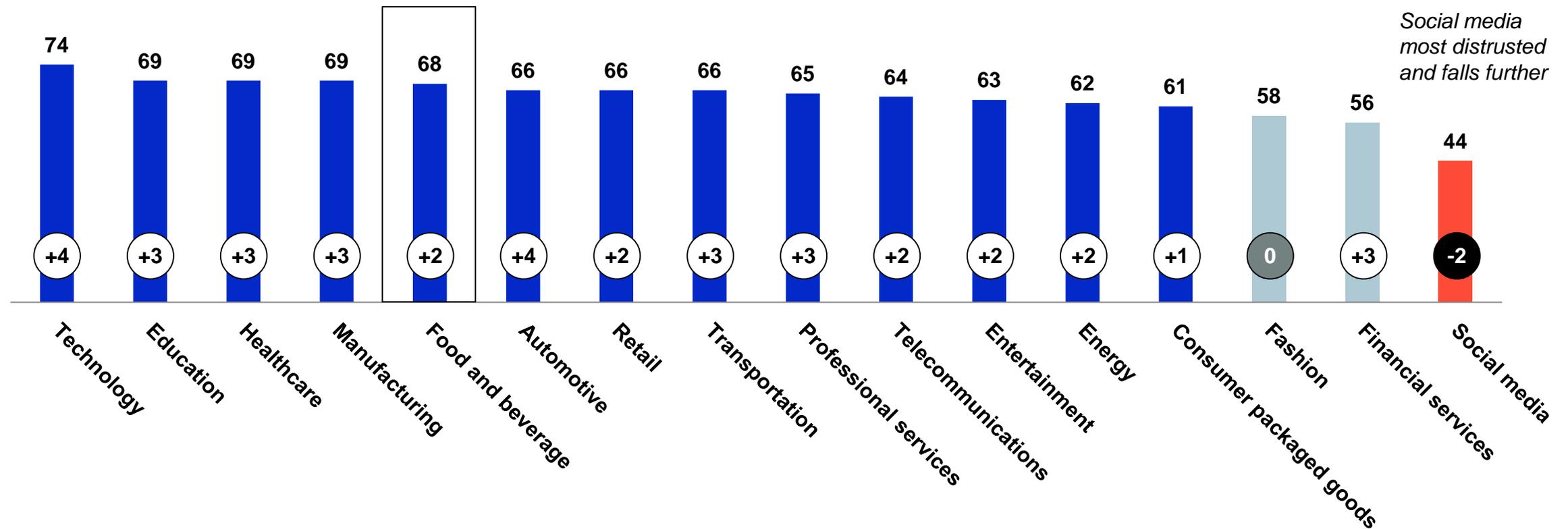
Distrust   Neutral   Trust | Change, 2021 to 2022

Social media most distrusted and falls further

Sector	Percent	Change
Technology	74	+4
Education	69	+3
Healthcare	69	+3
Manufacturing	69	+3
Food and beverage	68	+2
Automotive	66	+4
Retail	66	+2
Transportation	66	+3
Professional services	65	+3
Telecommunications	64	+2
Entertainment	63	+2
Energy	62	+2
Consumer packaged goods	61	+1
Fashion	58	0
Financial services	56	+3
Social media	44	-2

TRUST IN FOOD AND BEVERAGE SECTOR REMAINS BELOW PRE-PANDEMIC HIGHS

Percent trust in the food and beverage sector vs. trust in business

Change, 2019 to 2022

Food and beverage sector -2

Business in general +4
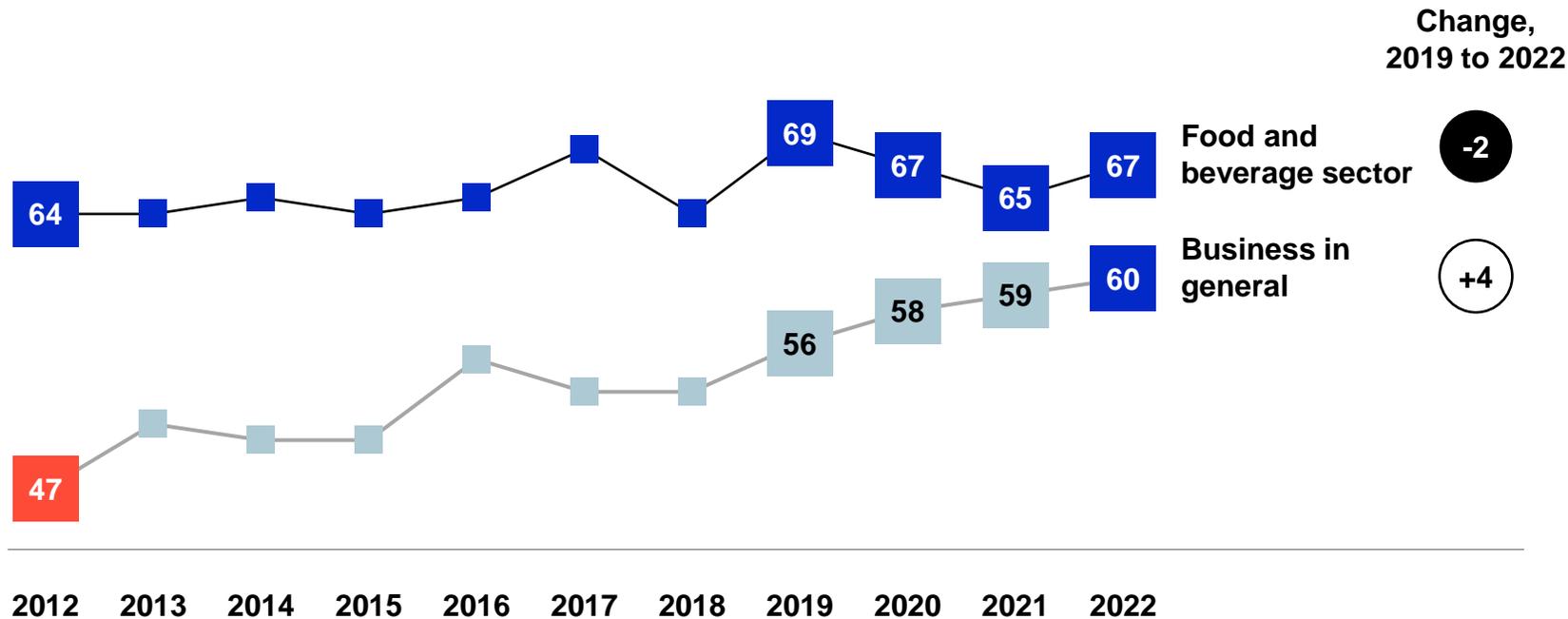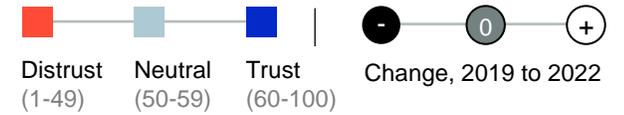
Countries with double-digit declines in food and beverage trust since 2019

	% trust, 2022	Change, 2019 to 2022
Canada	60	-13
U.S.	59	-12

2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

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INCOME-BASED TRUST INEQUALITY FOR FOOD REMAINS

Percent trust in the food and beverage sector

Distrust Neutral Trust

Global 22

Food sector income trust divide grows during pandemic

High income
(Top 25%)

74
71
70
69
71
65

7pts   **9pts**   *Trust gap, high vs. low income*

64
63
62
61   **60**   **60**   Low
(Bottom 25%)

2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

Top 5 countries with the greatest income-based trust inequality

The Netherlands	21pts
Thailand	20pts
Saudi Arabia	18pts
U.S.	17pts
Indonesia	15pts

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FOOD AND BEVERAGE SECTOR NOT TRUSTED IN THREE OF WORLD'S LARGEST FOOD EXPORTERS

Percent trust, in food and beverage sector

Distrust | Neutral | Trust | Change, 2021 to 2022

Global 27

68

+2 pts

Change, 2021 to 2022

| Country	Value	Change
Indonesia	87	+4
India	83	+2
UAE	81	+8
China	80	+11
Thailand	79	+2
Malaysia	77	+1
Saudi Arabia	77	+3
*Nigeria	75	n/a
Mexico	74	+5
Brazil	73	+5
Australia	69	+1
Kenya	69	+4
Ireland	68	+6
Singapore	68	0
S. Africa	68	-1
Italy	67	+2
Colombia	67	+1
The Netherlands	66	+1
Spain	64	+1
Argentina	61	+1
Japan	61	+4
S. Korea	61	0
Canada	60	-2
UK	60	+1
U.S.	59	-6
Germany	57	0
France	53	+4
Russia	42	-3

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TRUST IN FOOD AND BEVERAGE SECTOR DIFFERS BY INCOME, GEOGRAPHY, RACE/ETHNICITY AND POLITICS

Percent trust, food and beverage sector

Distrust   Neutral   Trust

🌐 **Gender | Age | Income | Location**
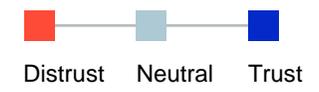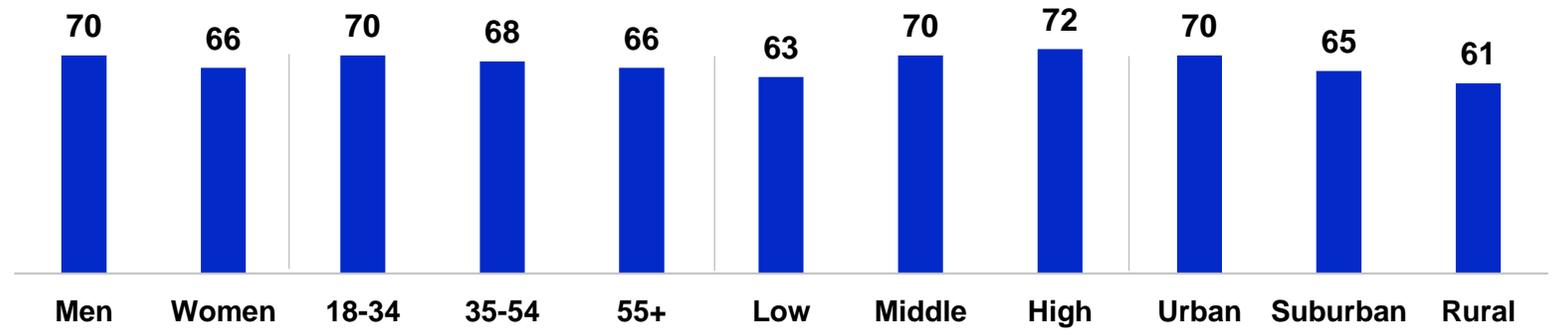
Global 27

68	

Food and beverage

Men	Women	18-34	35-54	55+	Low	Middle	High	Urban	Suburban	Rural
70	66	70	68	66	63	70	72	70	65	61

🇺🇸 **U.S. Race and Ethnicity | Political Affiliation**

White	Black	Hispanic	Asian	Rep.	Dem.	Ind/3rd Party
62	55	58	67	63	65	52

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TRUST RISES IN 5 FOOD AND BEVERAGE SUBSECTORS

Percent trust, in food and beverage subsectors

Distrust Neutral Trust | Change, 2021 to 2022

Grocery stores	Farming and fishery	Food and beverage manufacturers	Plant-based food manufacturers	Digital food delivery	Fast food	Brewing and spirits
72	71	66	63	61	56	55
+3	+2	+3	n/a	+1	0	+1
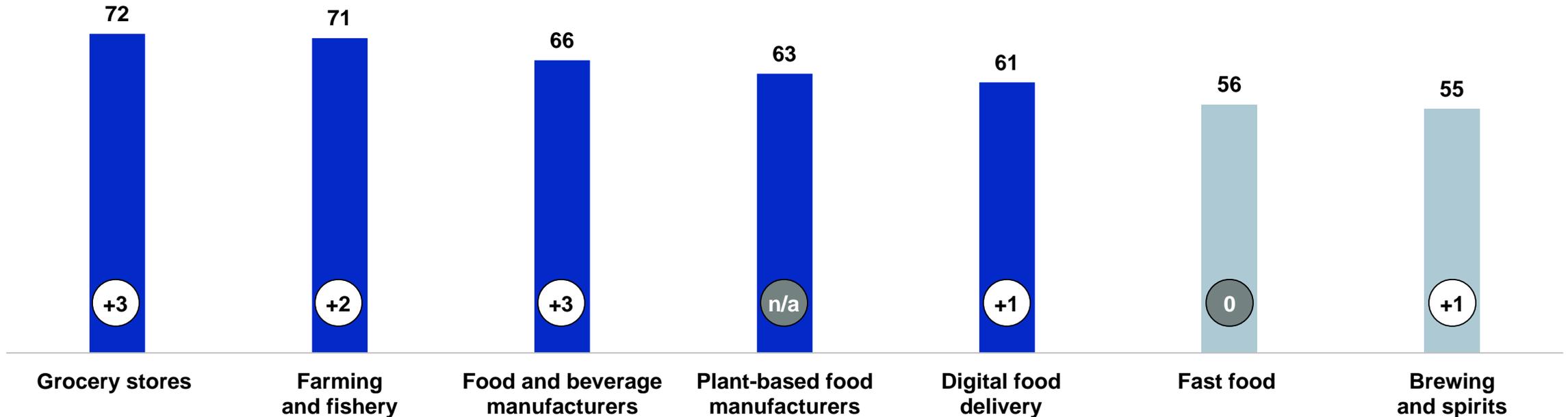
MOST INDUSTRIES NOT TRUSTED ON CLIMATE CHANGE ACTION

Percent trust on *climate change action*

Legend: Distrust (red) — Neutral (light blue) — Trust (dark blue)

Industry	Value
Renewable energy	73
Technology	65
Agriculture	64
Food & beverage	54
Electric utilities	52
Retail	49
Automotive	48
Transportation	47
Fashion	43
Oil & gas	43
Real estate developers	40
Private equity	39
Coal	38
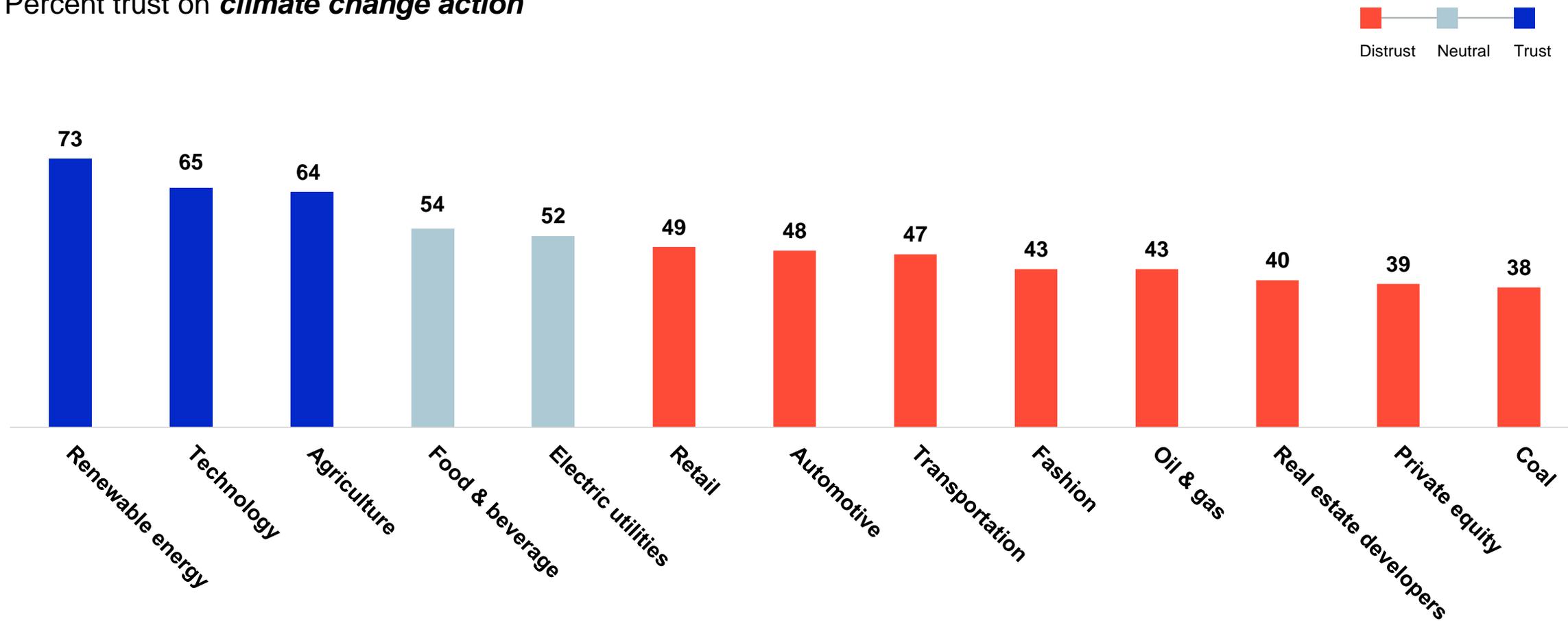
2021 Edelman Trust Barometer Special Report: Climate Change. ECO_TRU_IND. Below is a list of industry sectors. For each one, please indicate how much you trust that industry to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 14-mkt avg.

21

WIDESPREAD FEARS OF CLIMATE CHANGE

Percent who say

- ── 0 ── + Change, 2021 to 2022

I worry about **climate change leading to drought, rising sea levels and other natural disasters**

Least concern among U.S. respondents, and greatest decline in the U.S.

Global 27

75%

+3 pts

Change, 2021 to 2022

Food & beverage employees	72%

87	85	85	84	84	83	82	82	81	80	80	76	76	76	76	75	73	72	71	71	70	70	69	68	64	62	59	56
+9	+2	+7	+5	-1	+5	0	+4	+5	0	+7	+3	+3	+8	+1	+7	n/a	+6	+2	+1	+3	+6	+9	+2	+1	-4	+3	-5
Kenya	Colombia	Indonesia	Brazil	India	Italy	Mexico	Spain	Malaysia	Argentina	S. Africa	France	Singapore	S. Korea	Thailand	UAE	*Nigeria	Japan	Germany	Ireland	China	UK	Saudi Arabia	The Netherlands	Canada	Australia	Russia	U.S.

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CONSUMERS DON'T WANT TO PAY MORE FOR CLIMATE-FRIENDLY SOLUTIONS

Which are you more likely to believe?

Global 14

69%

To increase their use, the **burden should be on brands to make environmentally-friendly products cheaper**

or – – – – – – – – – – – – – –

the burden should be on people to be pay more for them

Brazil	France	Mexico	S. Africa	Canada	UK	S. Korea	Germany	Saudi Arabia	UAE	Japan	U.S.	India	China
77	75	75	74	72	72	71	69	69	69	65	64	63	56
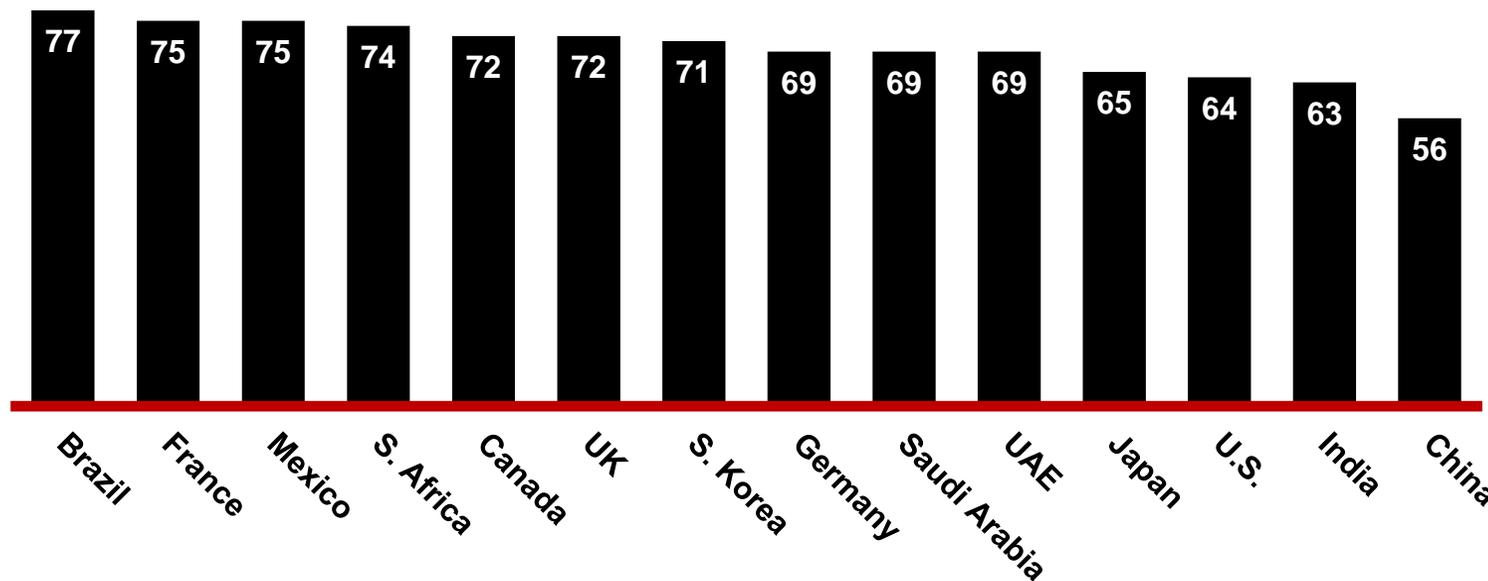
BUSINESS MUST ADDRESS FEARS TO BREAK THE CYCLE OF DISTRUST

NGOS AND BUSINESS MUST ACT AS STABILIZING FORCES

(Competence score, net ethical score)

35
ETHICAL

NGOs (3, 24)

Business (12, 14)

Business seen as 53 points more competent than government

2022
2021

- 50
LESS COMPETENT

Media (-18, -2)

COMPETENT

Government (-41, -12)
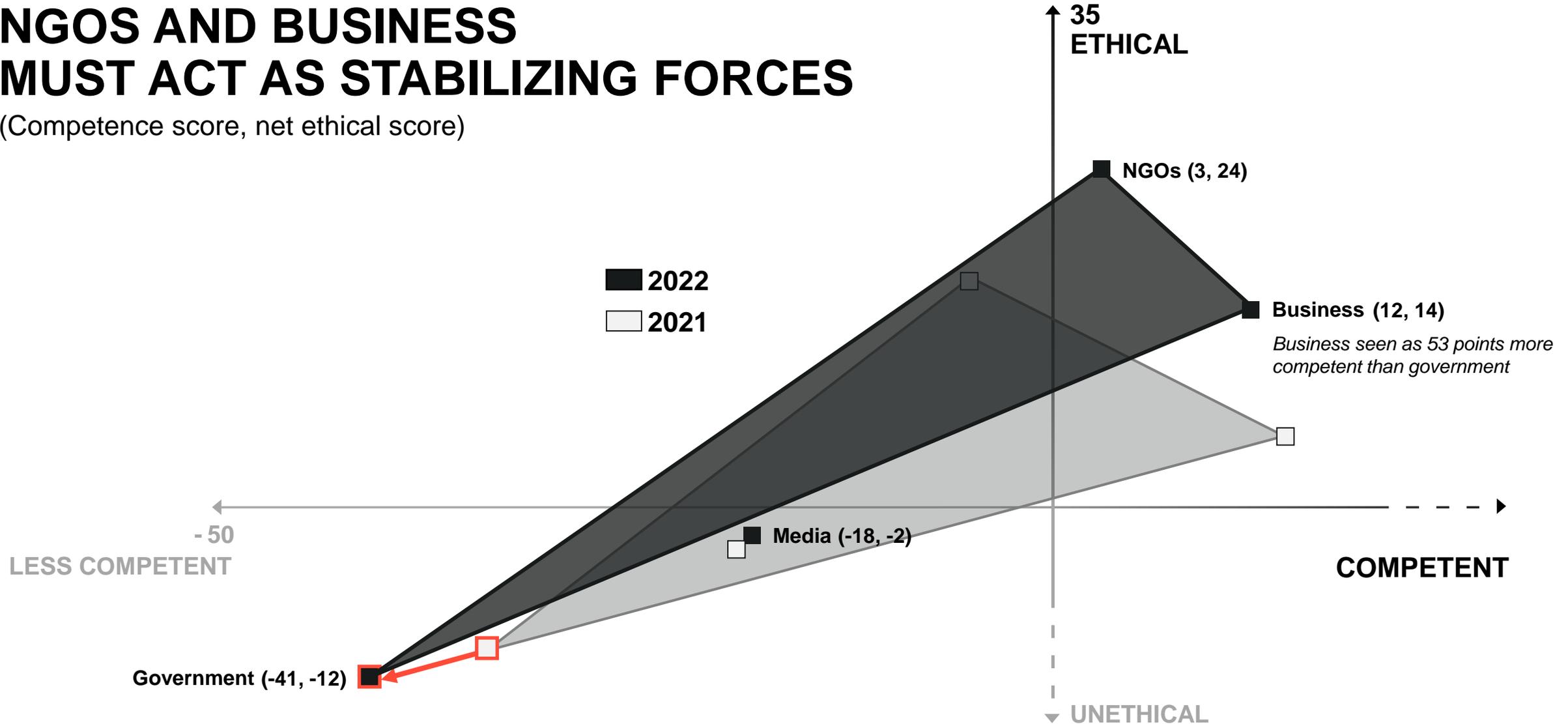
UNETHICAL

2022 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]_PER_DIM/1-4. Question asked of half of the sample. The competence score is a net based on TRU_3D_[INS]/1. Depending on the question it was either asked of the full of half the sample. General population, 24-mkt avg. Data not collected in China, Russia and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

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ALL STAKEHOLDERS HOLD BUSINESS ACCOUNTABLE

Percent who agree

Global 27

Global 7

58%

**Buy or advocate
for brands**
based on their beliefs
and values

60%

**Choose a place
to work**
based on their beliefs
and values

64%

Invest
based on their
beliefs and values

88%

of **institutional investors**
subject ESG to the same scrutiny
as operational and financial
considerations

NEARLY 2 IN 3 FOOD & BEVERAGE WORKERS CHOSE EMPLOYER BASED ON BELIEFS

Percent who agree, among employees

I choose a place to work based on my beliefs and values

Those employed in…

Global 27, All employees

60%

Fashion	Technology	CPG	Financial services	Telecomms	Energy	Automotive	Food and beverage	Manufacturing	Education	Entertainment	Retail	Healthcare	Insurance	Professional services	Transportation
73	70	68	67	66	64	62	61	61	60	60	57	56	56	55	50
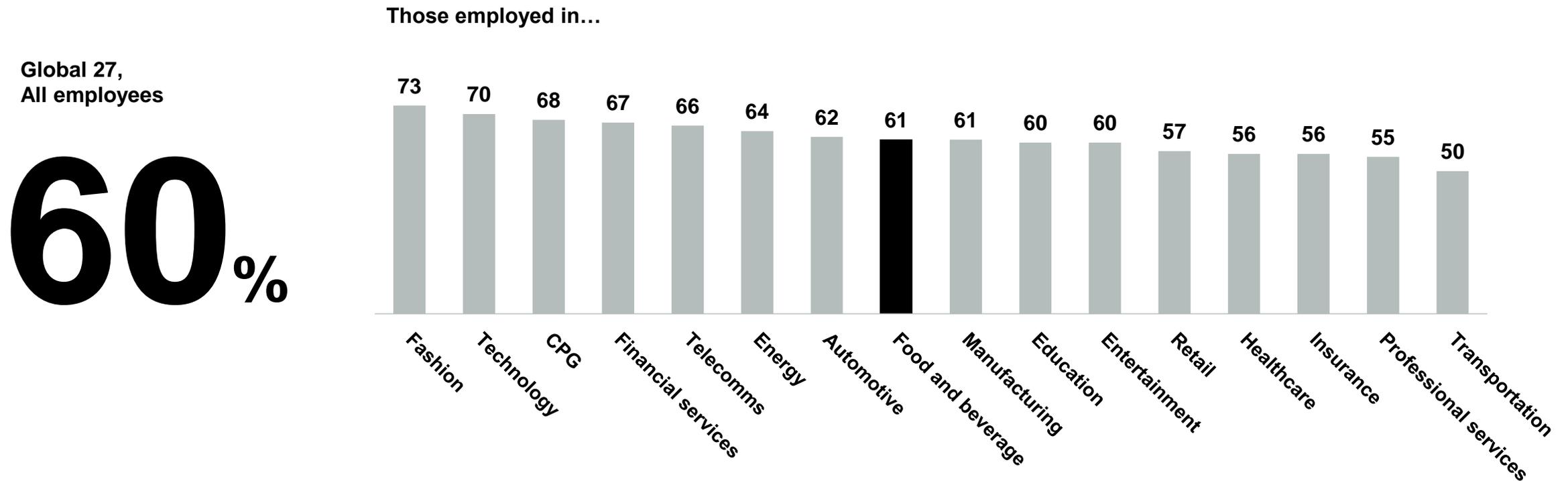
CEOS EXPECTED TO BE THE FACE OF CHANGE

Percent who say

CEOs should be personally visible when discussing public policy with external stakeholders or work their company has done to benefit society

When considering a job, I expect the CEO to speak publicly about **controversial social and political issues that I care about**

Those employed in…

Global 27, General population

81% (net)

Global 25, All employees

60% +5 pts

Change, 2019 to 2022

68	68	64	62	54
+11	+7	+3	+7	+1
Financial Services	Tech	Energy	Food & beverage	Health

CEOS EXPECTED TO INFORM POLICY ON JOBS, AUTOMATION, AND CLIMATE CHANGE

Percent who expect CEOs to **inform and shape conversations and policy debates** about each issue

	Strong/mandatory	Some expectation	Total	Total expectation (among food sector employees)
Jobs/economy	54	22	**76**	**74**
Technology and automation	50	24	**74**	**65**
Wage inequality	53	20	**73**	**65**
Global warming and climate change	47	21	**68**	**64**
Prejudice and discrimination	44	21	**65**	**63**
Immigration and its impact on jobs	37	24	**61**	**59**
Improving **education** and healthcare systems	38	23	**61**	**59**
How to increase the **COVID vaccination** rate	36	21	**57**	**59**
Who the **next leader of the country** should be	23	17	**40**	**38**

shape ongoing conversations and policy debates. 5-point scale; codes 4-5, strong/mandatory; code 3, some expectation. Question asked of half the sample. General population, 27-mkt avg. "Improving education and healthcare" is an average of attributes 9 and 10. "Jobs/economy" is an average of attributes 11 and 12. Callout among those employed in the food sector (Q420/8 and Q43/1).

EMPLOYERS TRUSTED ACROSS SECTORS

Percent trust in my employer

Distrust Neutral Trust | Change, 2021 to 2022

Those employed in…

**Global 27,
All employees**

77
MY EMPLOYER

+1 pt

*Change,
2021 to 2022*

	Technology	Financial services	Telecoms	Energy	Professional services	Fashion	Insurance	Retail	Food and beverage	Manufacturing	Automotive	CPG	Healthcare	Education	Transportation	Entertainment
Trust	84	83	83	82	81	80	80	79	77	77	75	75	75	74	74	73
Change	+1	0	+4	+1	+3	+10	n/a	+1	+1	+1	+4	+1	-1	-1	+6	-2

MY EMPLOYER TRUSTED AROUND THE WORLD

Percent trust

Global 27

77 MY EMPLOYER	
Business	61
NGOs	59
Government	52
Media	50

Americas GP	Americas F&B employees	APAC GP	APAC F&B employees	EMEA GP	EMEA F&B employees
78	72	78	75	76	81
-1	-10	+1	-3	+2	+8

MY EMPLOYER MEDIA MOST BELIEVABLE

Percent who believe information from each source automatically, or after seeing it twice or less


Communications from...

	My employer		National government	Media reports, named source	Major corporations	Advertising	Media reports, anonymous source	My social media feed
	among f&b employees	*among all employees*						
	66	**65**	**58**	**57**	**54**	**49**	**48**	**38**

Nr. of times they need to see the information repeated before believing it:

- Once or twice: 53, 52, 45, 47, 46, 41, 40, 32
- If I see it here, I will **automatically assume it is true**: 13, 13, 13, 10, 8, 8, 8, 6

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

| 9 | 6 | 15 | 13 | 16 | 21 | 21 | 27 |

RESTORING TRUST IN FOOD AND BEVERAGE

WANT MORE, NOT LESS, BUSINESS ENGAGEMENT ON SOCIETAL ISSUES

Percent who say among food and beverage employees

On addressing each **societal issue**,
business is…

■———□

not doing
enough   overstepping
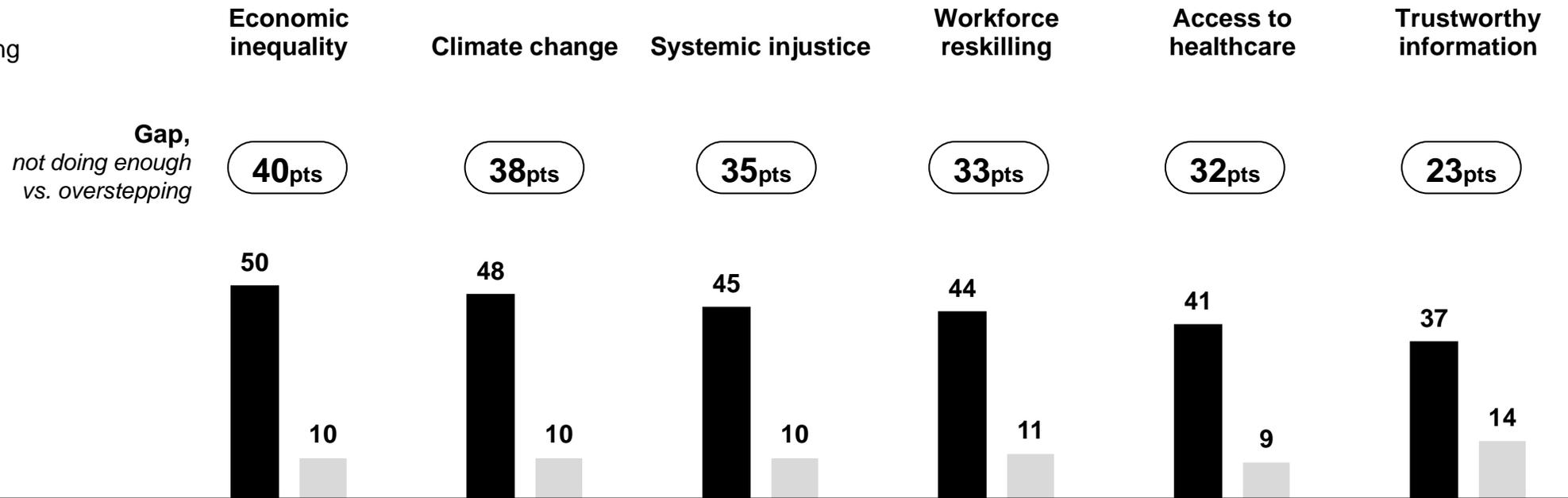
	Economic inequality	Climate change	Systemic injustice	Workforce reskilling	Access to healthcare	Trustworthy information
Gap, *not doing enough vs. overstepping*	**40**pts	**38**pts	**35**pts	**33**pts	**32**pts	**23**pts
not doing enough	50	48	45	44	41	37
overstepping	10	10	10	11	9	14

GOOD INFORMATION CAN HELP CLOSE THE SOCIETAL DIVIDE

Trust Index

Distrust   Neutral   Trust

Global 22

High income

62

Low income, well-informed 57

High income, not well-informed 55

47

When low-income respondents are well-informed, they are more trusting than high-income respondents who are not

Low income

2012

2022
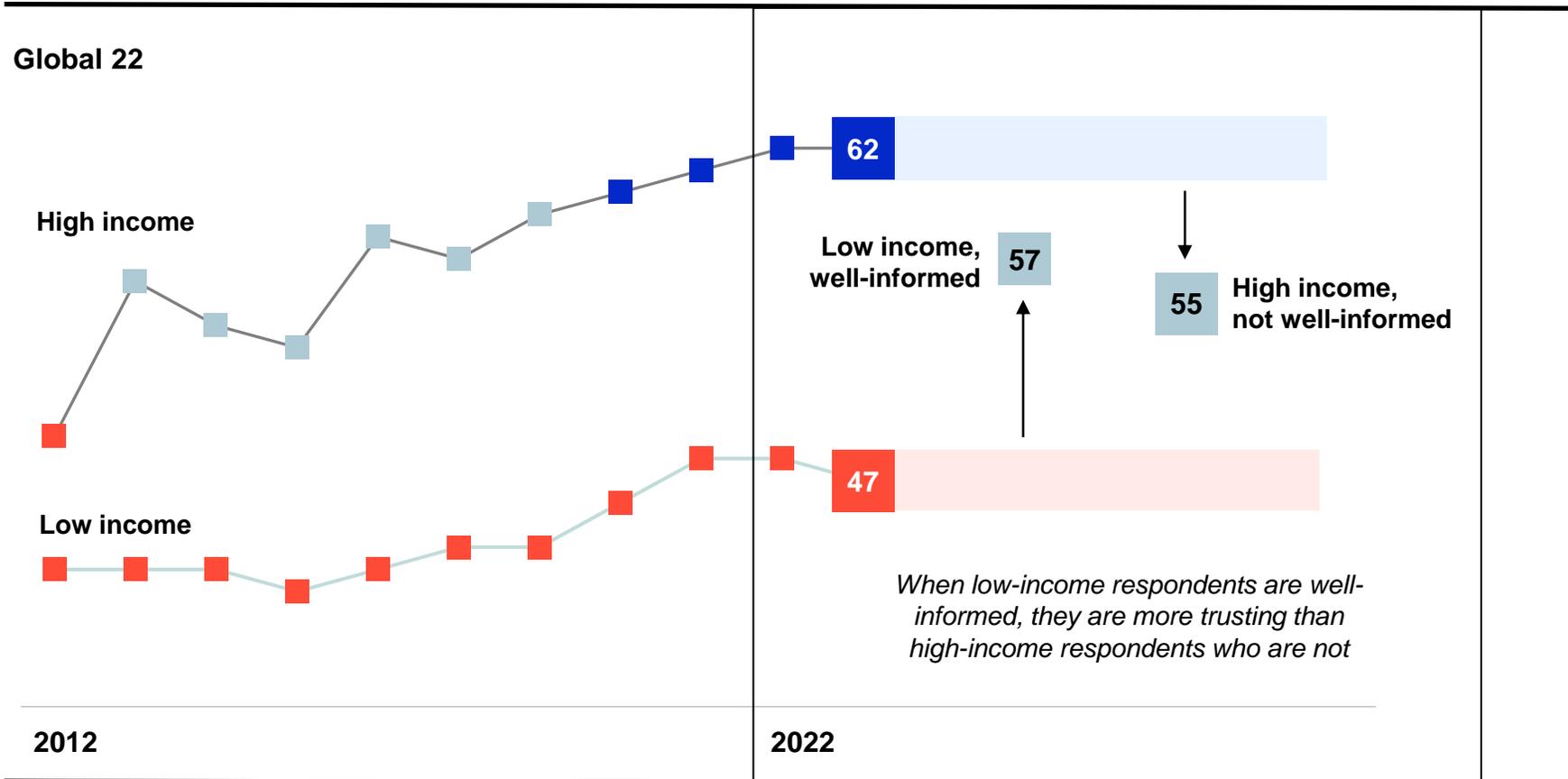
Well-informed

regularly do the following:

Follow news regularly
☐ Consult 3+ news sources daily
☐ Read business and/or public policy news

Seek quality information
☐ Consult news sources with which they disagree
☐ Check information against multiple sources

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RESTORING TRUST
IS KEY TO SOCIETAL STABILITY

BUSINESS

GOVERNMENT

MEDIA

NGOs

Sustainability

Equity and inclusion

SOCIETAL STABILITY

Jobs and retraining

Wage fairness
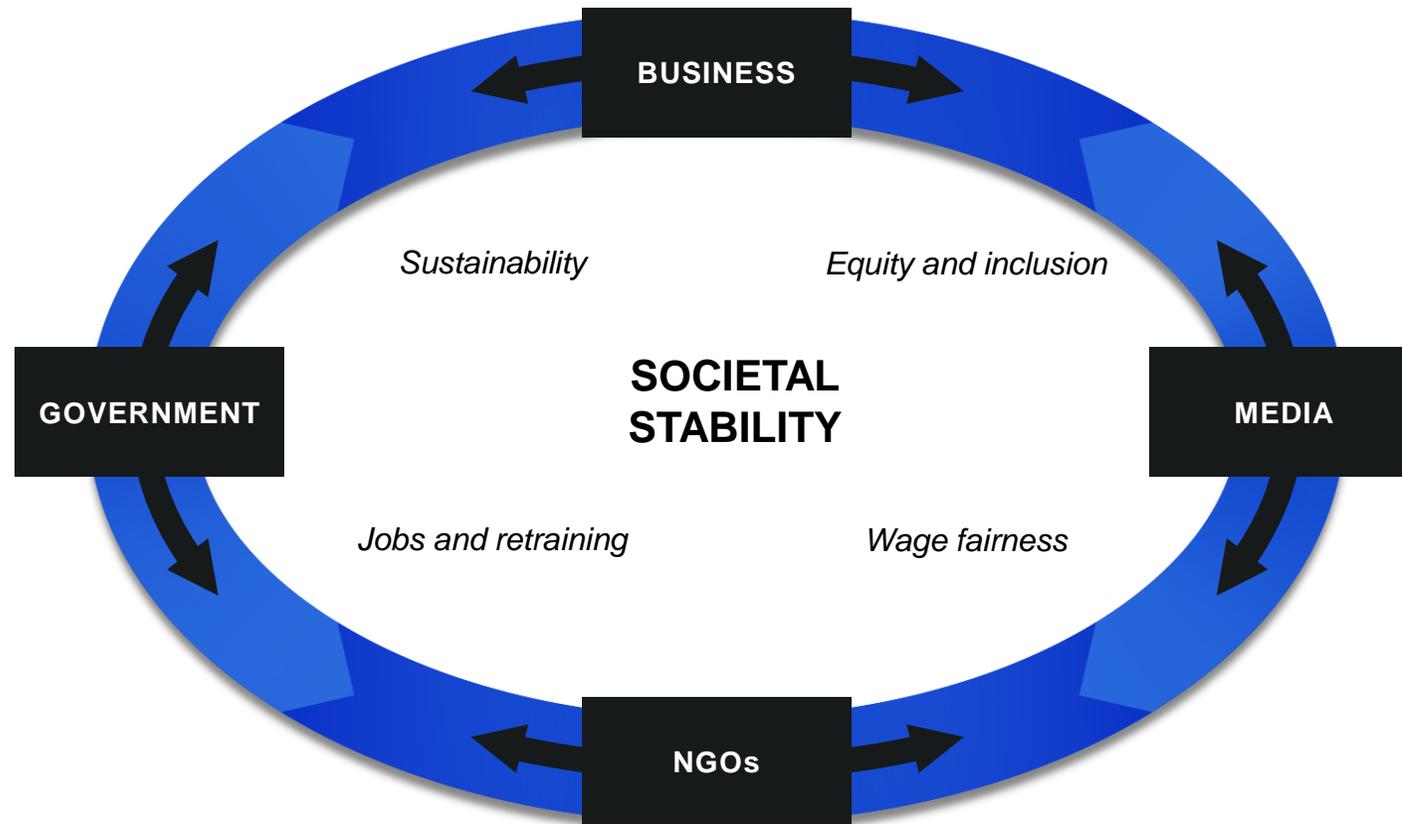
RESTORING TRUST IN FOOD & BEVERAGE

1

Break through the information barrier

Provide clear, credible, fact-based information; demonstrate leadership in areas of concern; elevate and amplify trusted voices.

2

Build trust across the full food ecosystem

When trust in government lags, other institutions must play a larger role to build confidence in areas of concern. Engage in the societal issues your stakeholders care most about and demonstrate progress.

3

Own the employer role in building trust

Leverage trust in owned channels, "my CEO" and colleagues; provide platforms to amplify employee voices.

4

Engage with other trusted institutions

NGOs are doing important, effective work and strategically partnered, can help businesses with issues, actions and outcomes.