



Edelman Trust Barometer 2021



DUE TO THE
COVID-19 PANDEMIC
FOR THE HEALTH
+ SAFETY OF
STAFF + CUSTOMERS
WE ARE CLOSED
UNTIL FURTHER
NOTICE.



21 YEARS OF TRUST

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
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 Plummet	Performance and Transparency Essential to Trust	Business Must Partner With Government to Regain Trust
2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	
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	Declaring Information Bankruptcy	

21st ANNUAL EDELMAN TRUST BAROMETER

Methodology



Online survey in 28 countries*

33,000+ respondents

2021 Edelman Trust Barometer fieldwork
conducted from October 19 to November 18, 2020

**The 2021 Trust Barometer 27-market global averages (for the general population, mass population and informed public) do not include Nigeria*

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=25,050+); half-sample global general online population +/- 0.8% (N=15,525).

Country-specific data margin of error: General population +/- 2.9% (N=1,150); informed public +/- 6.9% (N=min 200, varies by country), except for China and U.S. +/- 4.4% (N=500) and Nigeria +/- 9.8% (N=100); mass population +/- 3.0% to 3.6% (N=min 736, varies by country), except for Nigeria +/- 2.9% (N=1,125).

U.S. Post-Election Supplement margin of error: +/- 2.5% (N=1,500).

U.S. Post-Election Supplement ethnicity-specific data margin of error: Non-Hispanic White +/- 3.3% (N=894); all others +/- 4.0 (N=607).

General Online Population

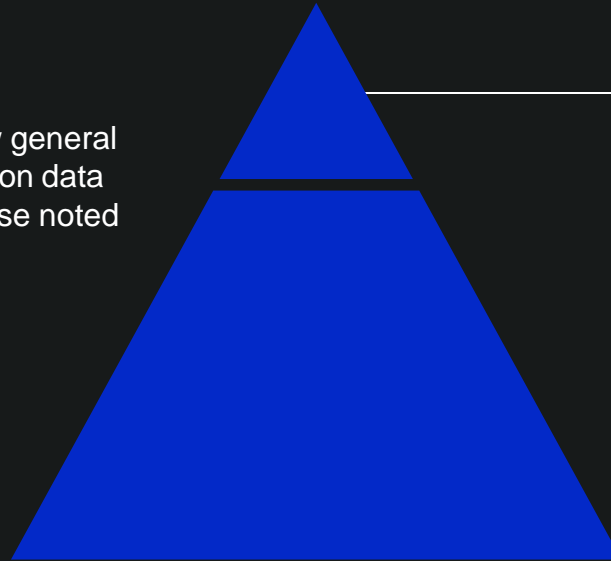
1,150

respondents per country

Ages

18+

All slides show general
online population data
unless otherwise noted



Informed Public

500 respondents in U.S. and China;
100 respondents in Nigeria;
200 in all other countries

Represents **17%** of total global population

Must meet 4 criteria:

- ▶ Age **25-64**
- ▶ College-educated
- ▶ In top **25%** of household income per age group in each country
- ▶ Report significant engagement in public policy and business news

Mass Population

All population not including
informed public

Represents **83%** of total global
population



U.S. Post-Election Supplement

1,500 U.S. respondents, fielded December 14 to 18, 2020



A YEAR OF CRISIS PUTS TRUST TO THE TEST

1

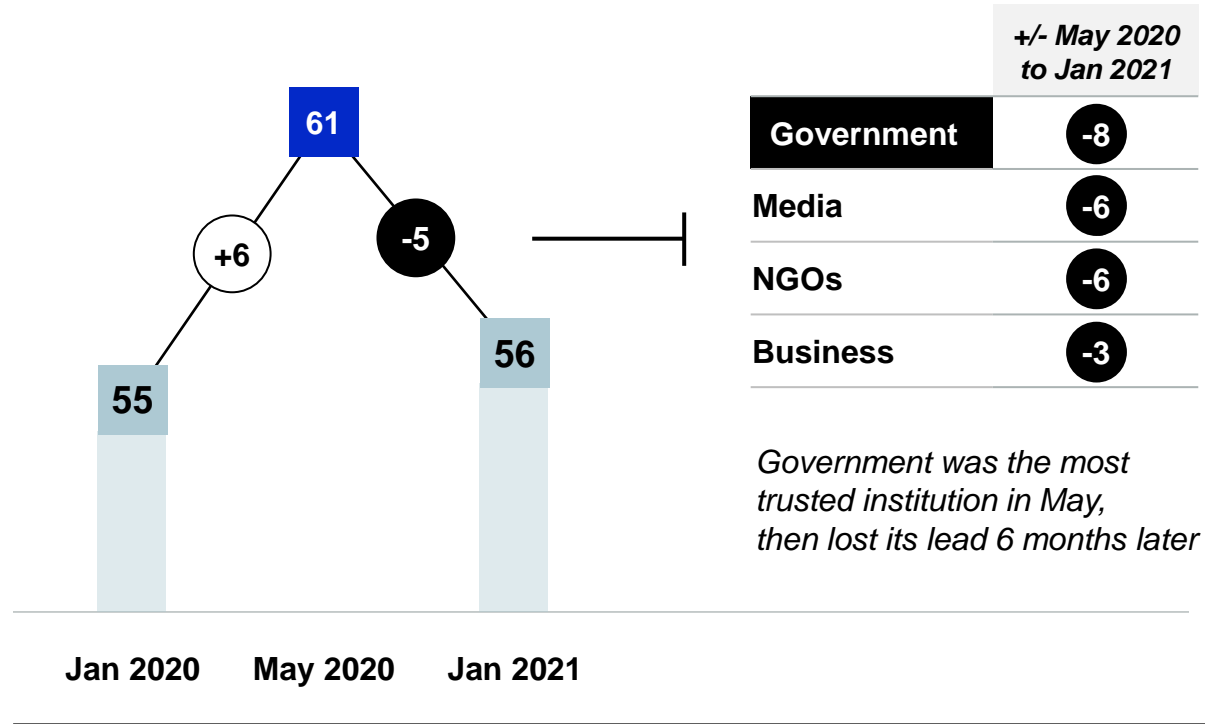
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SPRING TRUST BUBBLE BURSTS; BIGGEST LOSS FOR GOVERNMENT

Trust Index, 11 countries included in the 2020 Trust Barometer Spring Update



Global 11

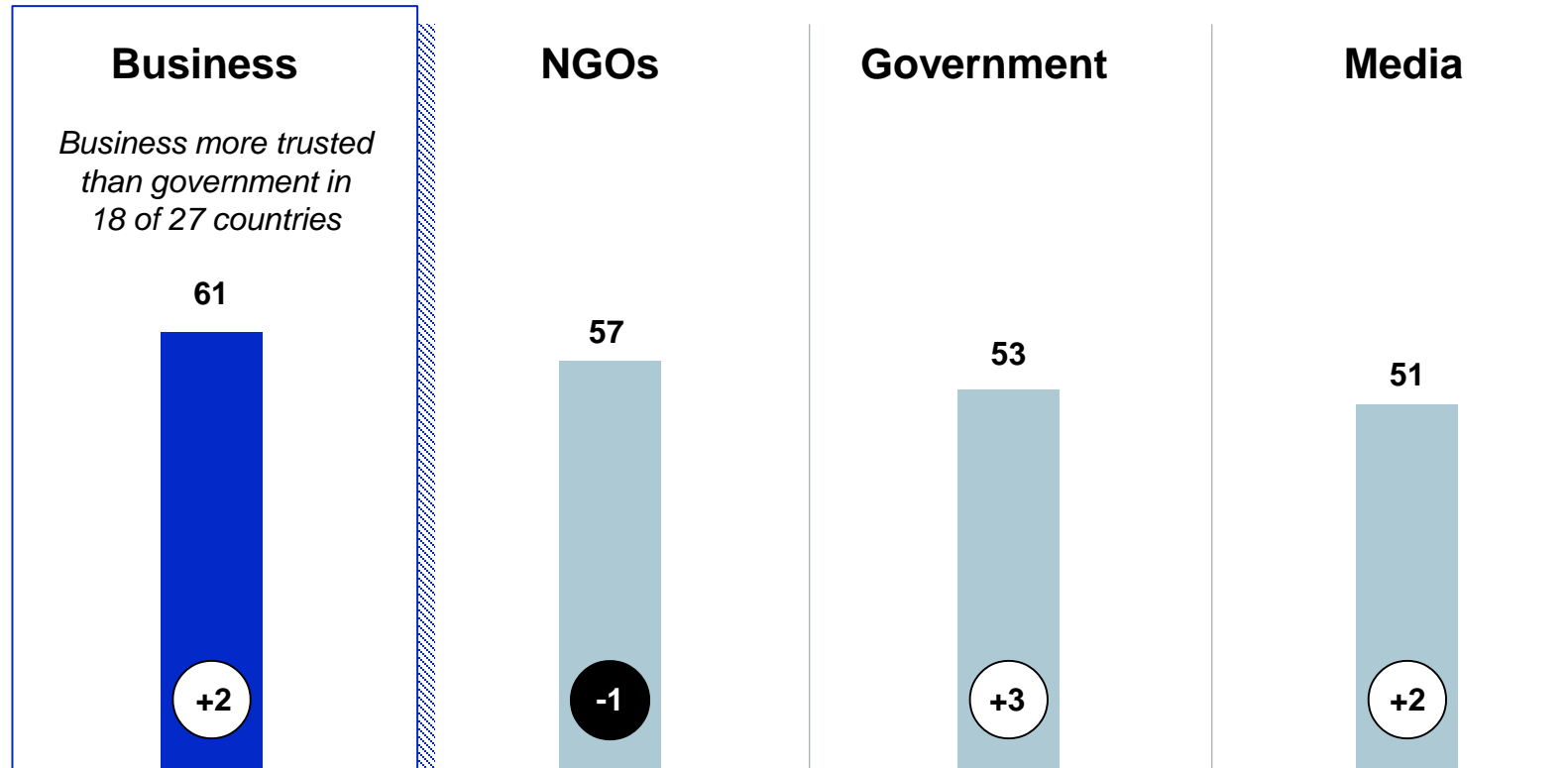
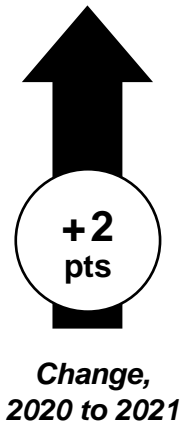
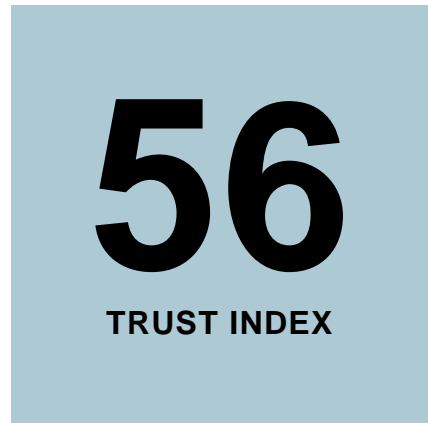


Government	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
S. Korea	+16	-17
UK	+24	-15
China	+5	-13
Mexico	+12	-12
Canada	+20	-11
India	+6	-8
U.S.	+9	-6
Germany	+19	-5
Japan	-5	-1
Saudi Arabia	+5	-1
France	+13	+2

2021 Edelman Trust Barometer. 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.

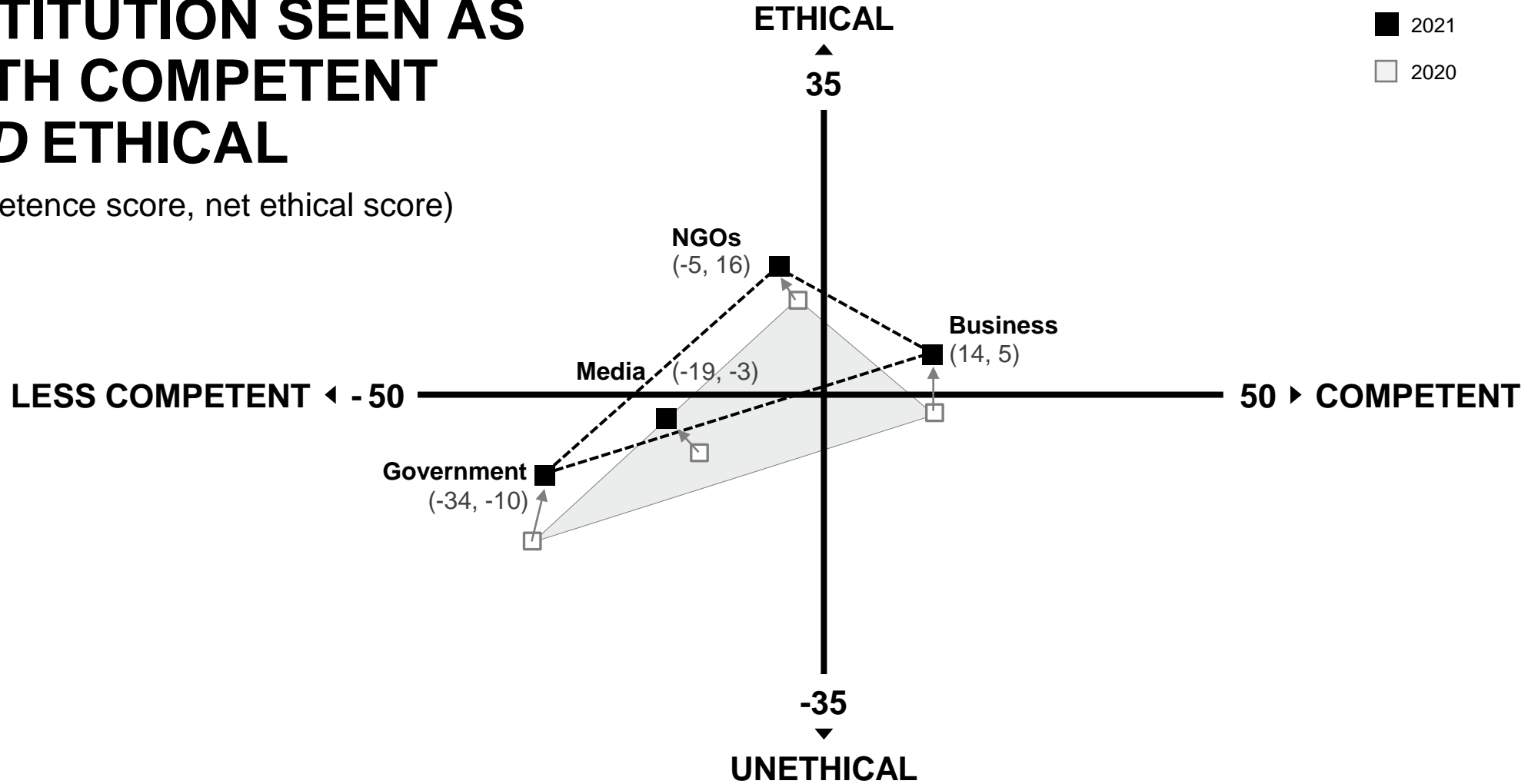
BUSINESS BECOMES ONLY TRUSTED INSTITUTION

Percent trust



BUSINESS NOW ONLY INSTITUTION SEEN AS BOTH COMPETENT AND ETHICAL

(Competence score, net ethical score)



2021 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.

TRUST IS LOCAL: MY EMPLOYER A MAINSTAY OF TRUST

Percent trust in my employer

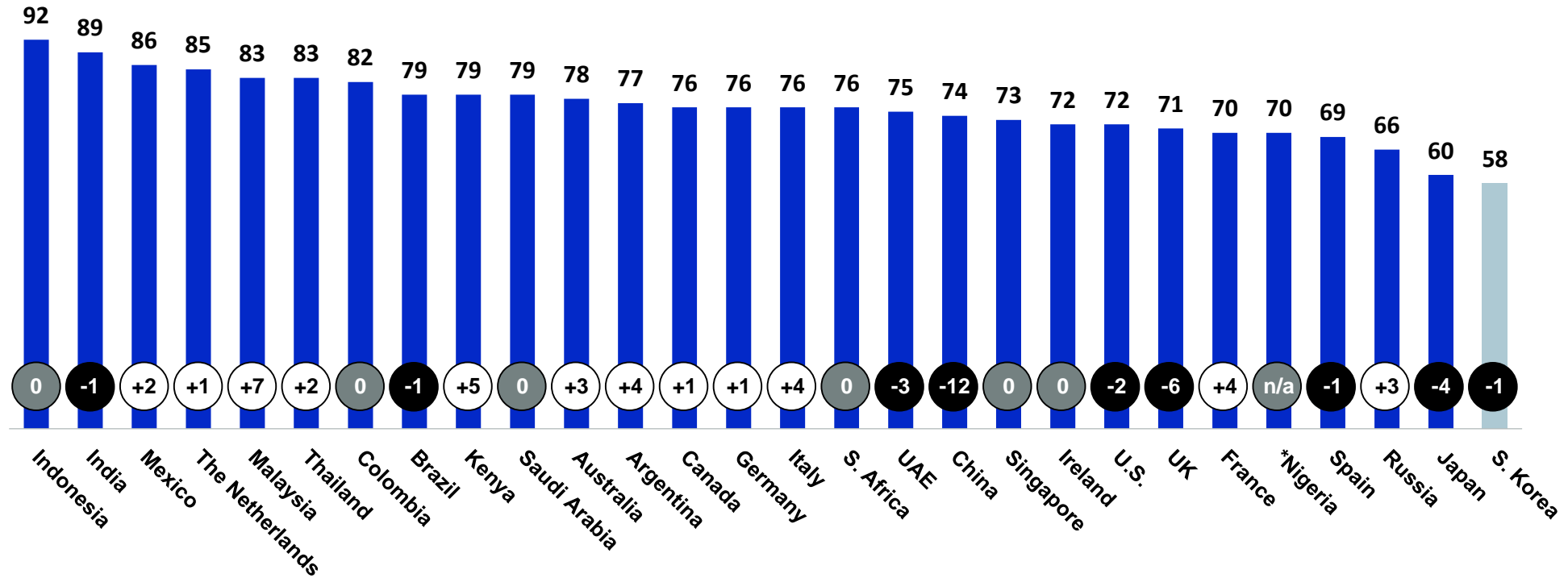


Global 27



Business	61
NGOs	57
Government	53
Media	51

Trust in my employer stable or rising in 18 of 27 countries



2021 Edelman Trust Barometer. 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. 9-point scale; top 4 box, trust. General population, 27-mkt avg. Question asked among those who are employed (Q43/1).
*Nigeria not included in the global average

INCREASED URGENCY TO ADDRESS FOUNDATIONAL PROBLEMS

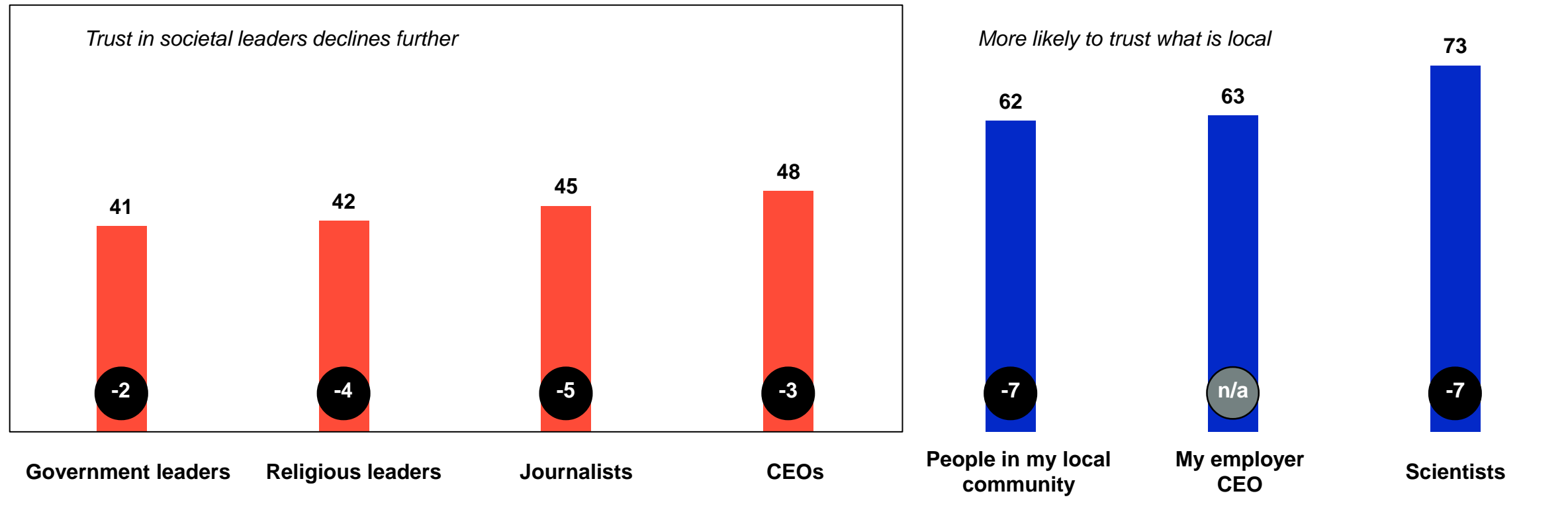
Change in importance since last year
(more important minus less important)

2021 Edelman Trust Barometer. IMP_POL_PRIORITIES. For each of the following issues and challenges, please indicate whether our country addressing it has become more important to you, less important to you, or has stayed the same in importance, since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. General population, 27-mkt avg. Net change is the difference between more and less important.

<i>Change in importance since last year</i>	Net change	More Important	Less Important
Improving our healthcare system	+62	70	8
Addressing poverty in this country	+53	62	9
Improving our education system	+53	62	9
Addressing climate change	+51	61	10
Finding ways to combat fake news	+50	60	10
Protecting people's individual freedoms	+50	59	9
Closing the economic and social divide	+48	58	10
Addressing discrimination and racism	+42	53	11

SOCIETAL LEADERS NOT TRUSTED TO DO WHAT IS RIGHT

Percent trust

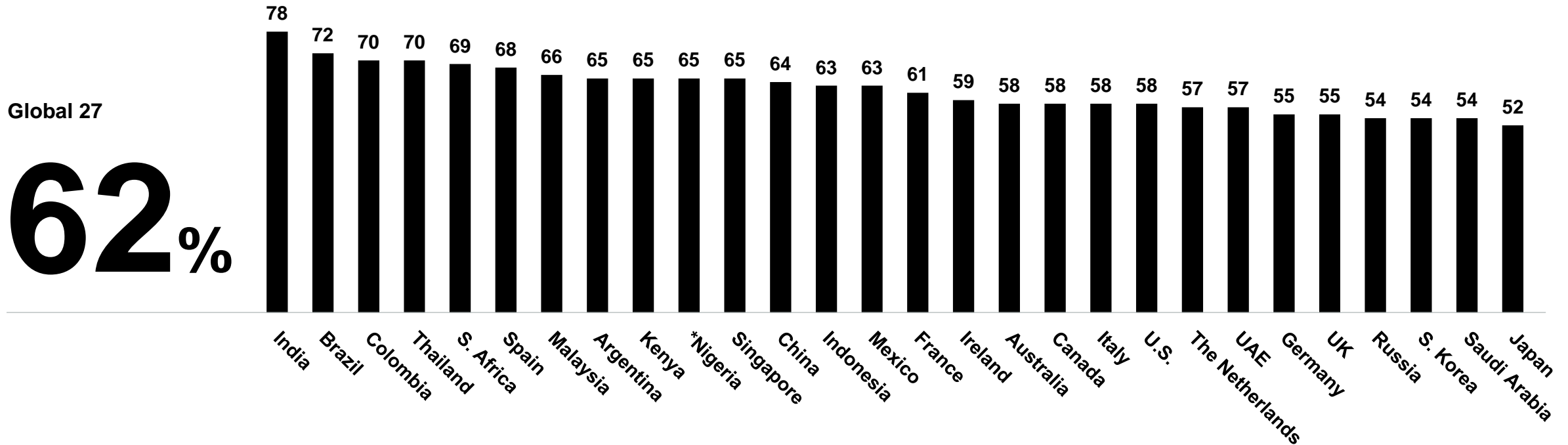


2021 Edelman Trust Barometer. TRU_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. Attributes shown to half of the sample; "My employer CEO" only shown to those that are an employee (Q43/1). General population, 27-mkt avg.

PANDEMIC DEEPENS INEQUITIES AROUND THE WORLD

Percent who agree

Those with **less education, less money and fewer resources** are being **unfairly burdened** with most of the suffering, risk of illness, and need to sacrifice due to the pandemic



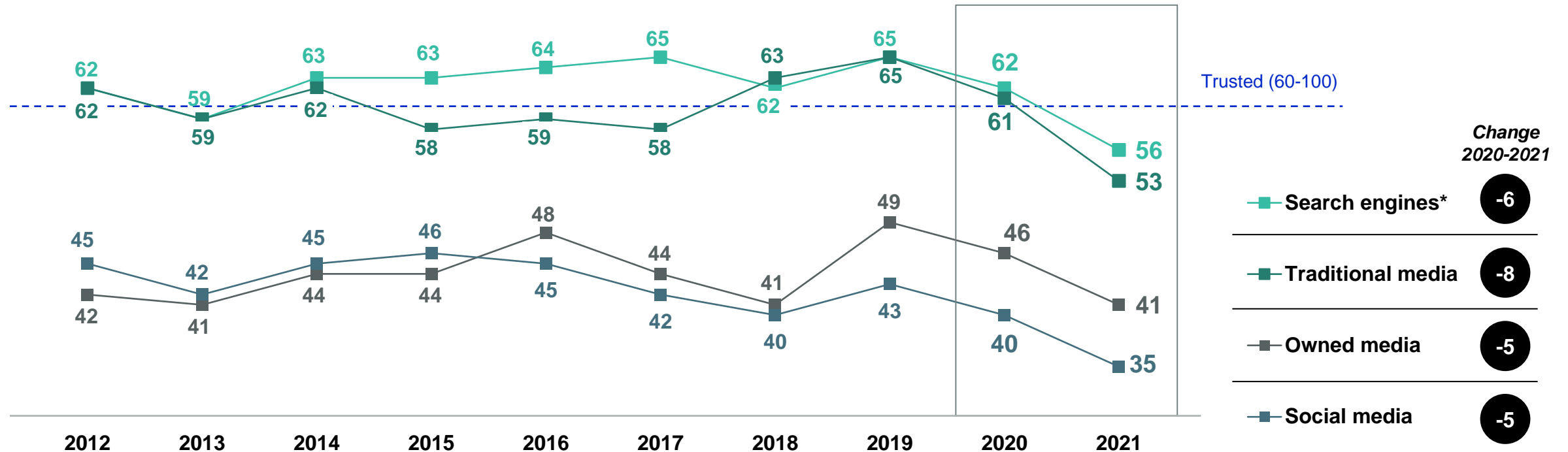
2021 Edelman Trust Barometer. CV1_Q3. Please indicate your level of agreement with the statements below using a nine-point scale where one means "strongly disagree" and nine means "strongly agree". 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, 27-mkt avg.

*Nigeria not included in the global average

TRUST IN ALL INFORMATION SOURCES AT RECORD LOWS

Percent trust in each source for general news and information

Global 22



2021 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? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 22-mkt avg.

*From 2012-2015, "Online Search Engines" were included as a media type. In 2016, this was changed to "Search Engines."



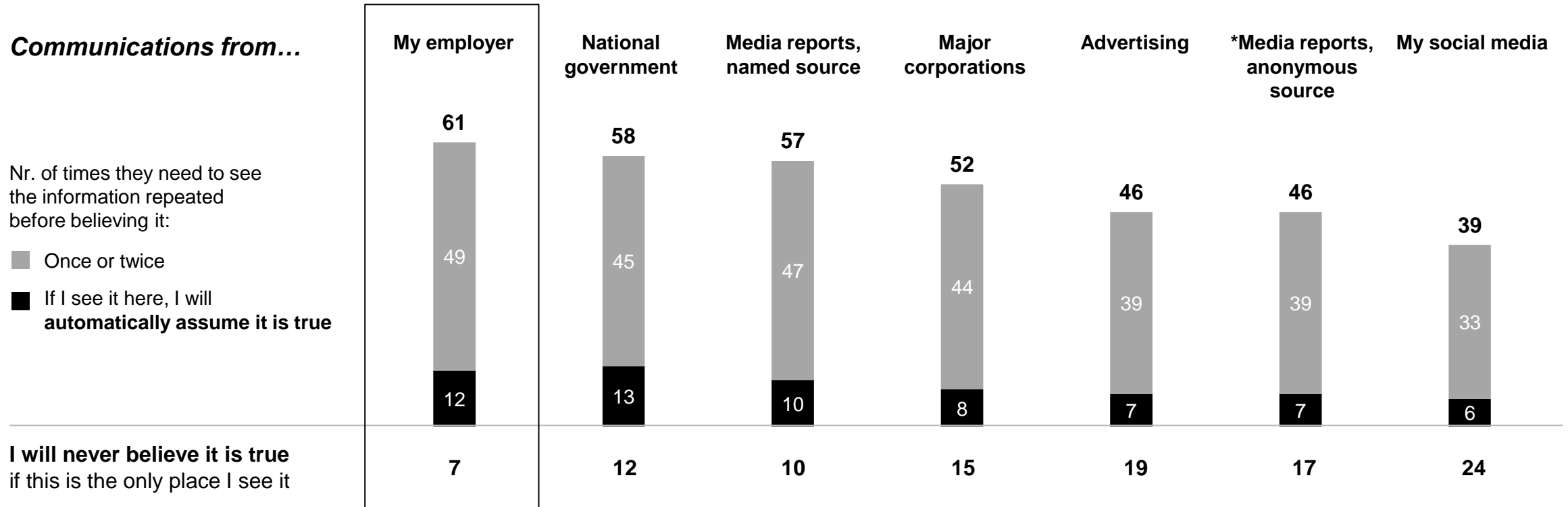
⊥

THE NEW MANDATE FOR BUSINESS

⊥

EMPLOYER MEDIA MOST BELIEVABLE

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



2021 Edelman Trust Barometer. HEAR_TIME1. When you see a new piece of information or a news story in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample. "Once or twice" is a sum of codes 2 and 3. General population, 27-mkt avg. "Employer communications" only shown to those that are an employee (Q43/1).

*"Media reports, anonymous source" excludes Canada and France.

BUSINESS EXPECTED TO FILL VOID LEFT BY GOVERNMENT

Percent who agree

CEOs should step in
when the government does not fix societal problems

⊥
68%

CEOs should take the lead
on change rather than waiting for government to impose change on them

⊥
66%

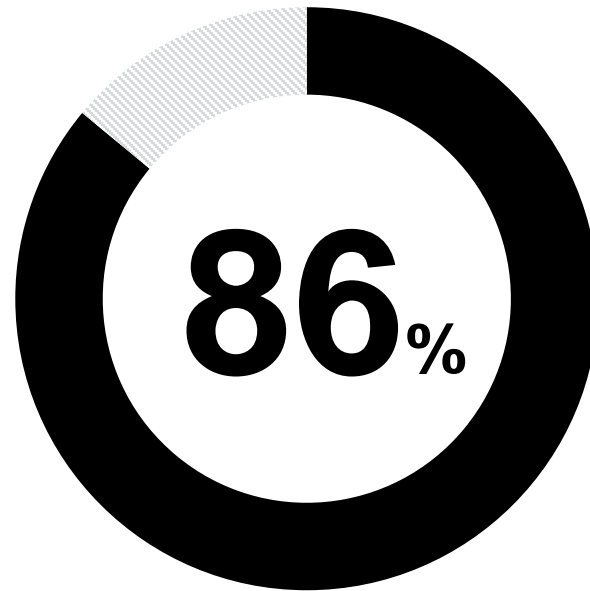
CEOs should hold themselves accountable to the public and not just to the board of directors or stockholders

⊥
65%

2021 Edelman Trust Barometer. CEO_EXP. Below is a list of potential expectations that you might have for a company CEO. Thinking about CEOs in general, whether they are global CEOs or a CEO who oversees a particular country, how would you characterize each using the following three-point scale? 3-point scale, sum of codes 2 and 3. Question asked of half of the sample. CEO_AGR. Thinking about CEOs, how strongly do you agree or disagree with the following statement? 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 27-mkt avg.

CEOS MUST LEAD ON SOCIETAL ISSUES

I expect **CEOs to publicly speak out** about one or more of these societal challenges



Pandemic impact	59
Job automation	51
Societal issues	43
Local community issues	40

BUSINESS GAINS THE MOST TRUST BY BEING A GUARDIAN OF INFORMATION QUALITY

Percent increased likelihood of trusting business associated with performing well on each action

<i>When these actions are performed well...</i>	Increased likelihood of trust
Guarding information quality	+5.8%
Embracing sustainable practices	+5.7%
Robust COVID-19 health and safety response	+4.8%
Driving economic prosperity	+4.7%
Long-term thinking over short-term profits	+4.6%

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THE FOOD & BEVERAGE SECTOR REMAINS ON SHAKY GROUND

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SUPPORT

OUR FARMERS

NO FARMERS



THE PAST YEAR INVITED AN INTENSE DIALOGUE ON THE STATE OF THE FOOD SYSTEM

The Economist

The Intelligence

“The risk of hunger remains—not for lack of food, but for lack of money”—covid-19 and food supplies

Also on the daily podcast: how the pandemic complicates crucial economic data and notes of caution for support-act bands



The Washington Post

Climate Curious

A third of all food in the U.S. gets wasted. Fixing that could help fight climate change.

The Guardian

Risk of global food shortages due to Covid has increased, says UN envoy

VICE World News

‘If You Want Work, You Keep Quiet’: Fast Food Workers on the COVID Frontline

CNN

• PERSPECTIVES •

4 steps we must take to fix the world's broken food system

THE STRAITS TIMES

The View From Asia

Don't let Asia starve

FOLHA DE S.PAULO

ENGLISH VERSION

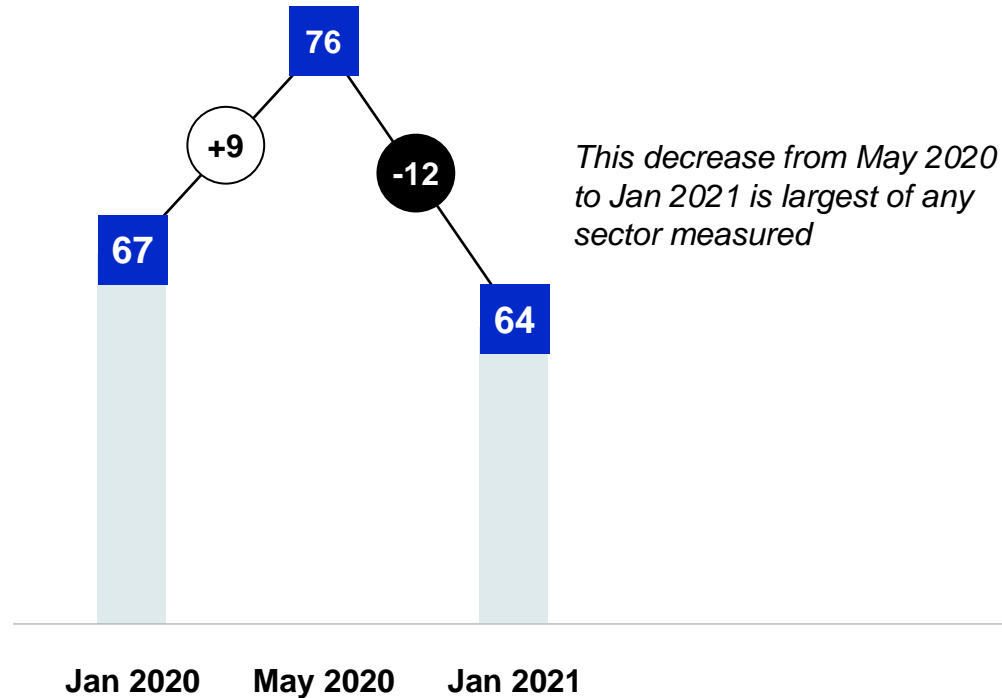
Deforestation in the Amazon Breaks Record and Grows 9.5% from 2019 to 2020

DRAMATIC DECLINES FOR FOOD AND BEVERAGE FOLLOWING SPRING TRUST SURGE

Trust in food and beverage, 11 countries included in the 2020 Trust Barometer Spring Update



Global 11, trust in food and beverage

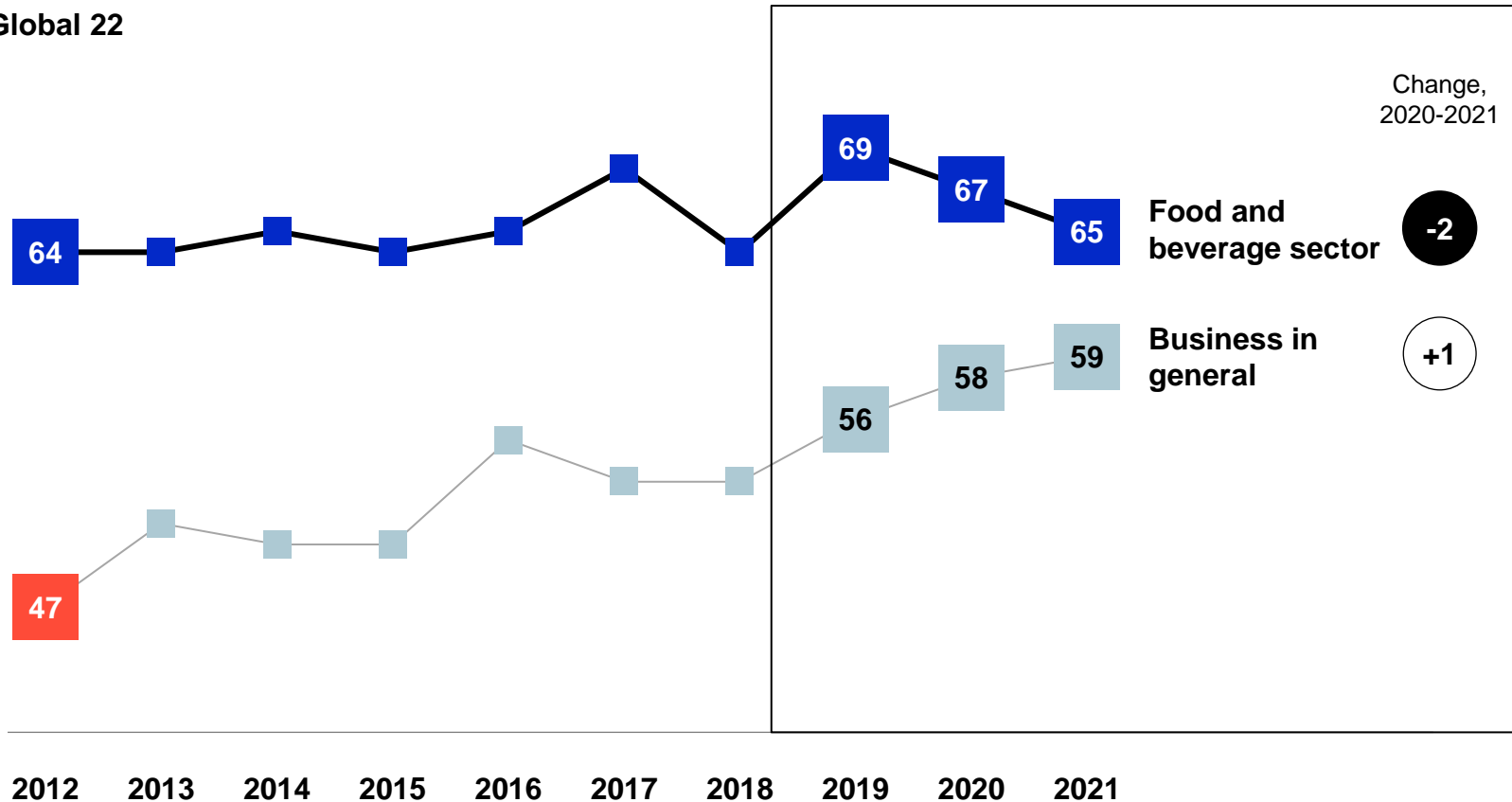


Countries	+/- Jan 2020 to May 2020	+/- May 2020 to Jan 2021
China	+11	-24
Germany	+18	-18
France	+18	-17
Canada	+11	-15
Mexico	+12	-14
UK	+6	-13
S. Korea	+2	-8
U.S.	+9	-7
Saudi Arabia	+9	-5
India	+3	-4
Japan	-5	-4

FOOD AND BEVERAGE NOT KEEPING PACE WITH BUSINESS TRUST GAINS

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

Global 22



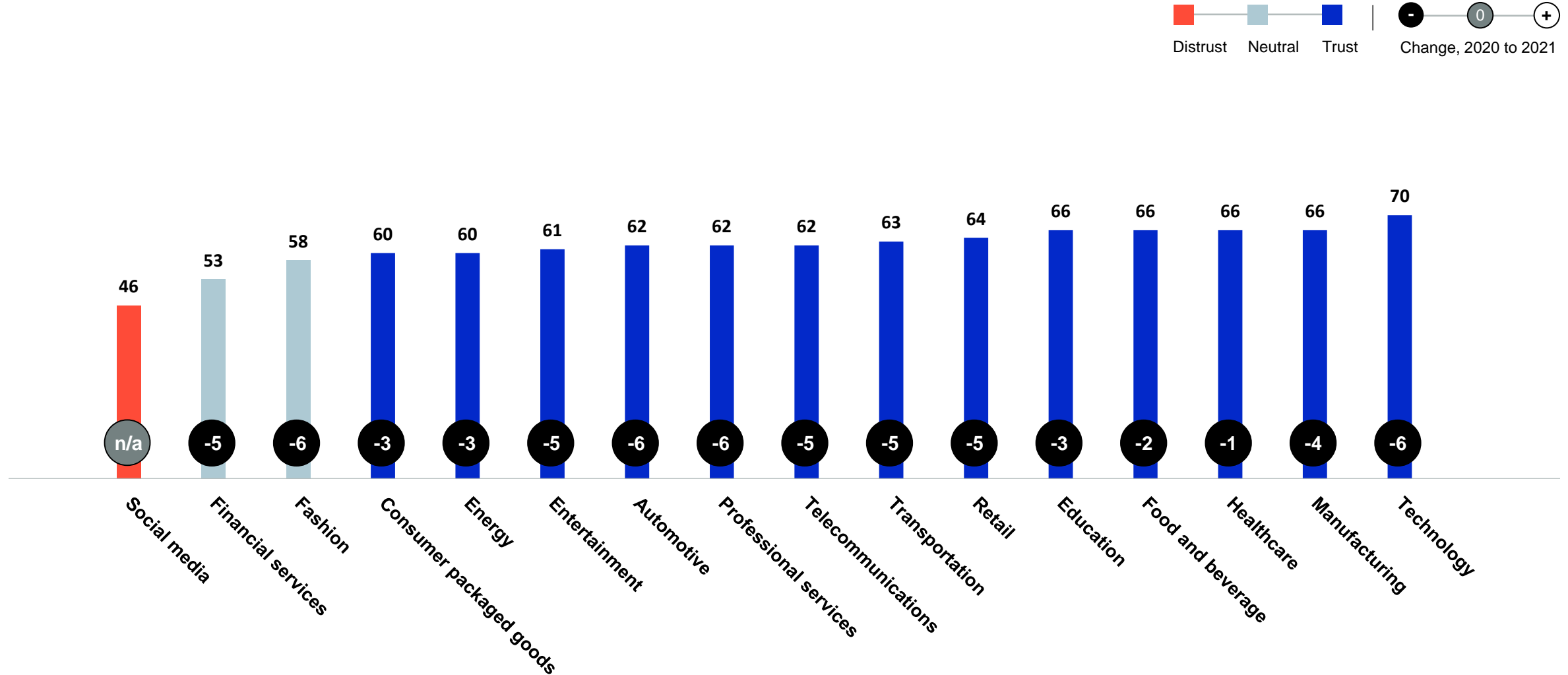
Countries with largest declines in food and beverage trust year-over-year

	Percent trust, 2021	Change, 2020-2021
China	69	-13
Argentina	60	-9
Japan	57	-9
Thailand	77	-8

2021 Edelman Trust Barometer. TRU_IND. [FOOD AND BEVERAGE] 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. TRU_INS. [BUSINESS] 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, 22-mkt avg.

DECLINE HAPPENING ACROSS INDUSTRY SECTORS

Percent trust in each sector



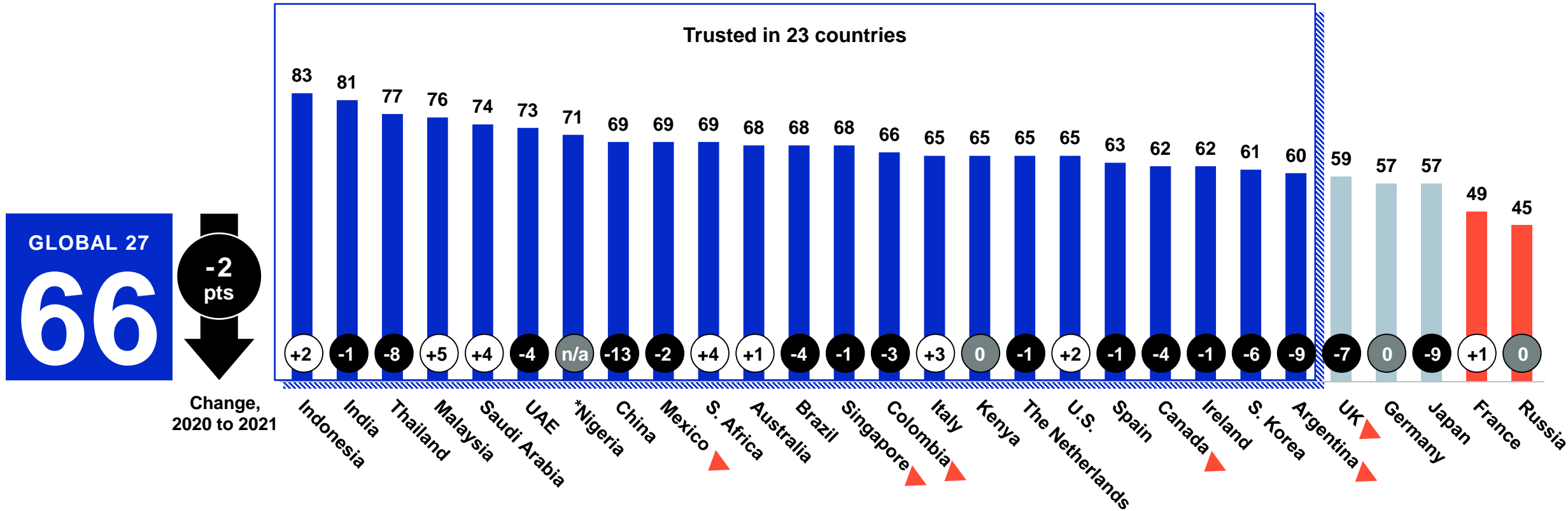
2021 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg.

TRUST IN FOOD AND BEVERAGE DECREASES IN 16 OF 27 COUNTRIES



Percent trust

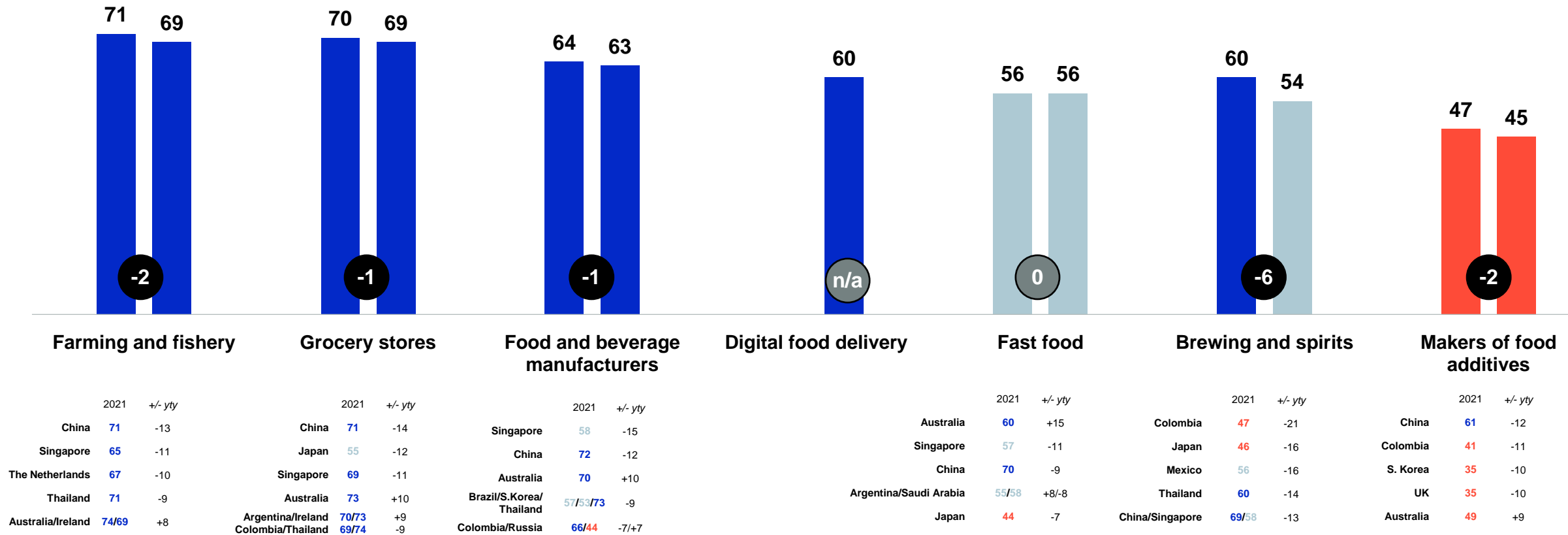
▼ All-time low



2021 Edelman Trust Barometer. TRU_IND. [FOOD AND BEVERAGE] 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. General population, 27-mkt avg. *Nigeria not included in the global average

TRUST DECLINES ACROSS SUBSECTORS; BREWING AND SPIRITS THE HARDEST HIT

Percent trust in food and beverage subsectors

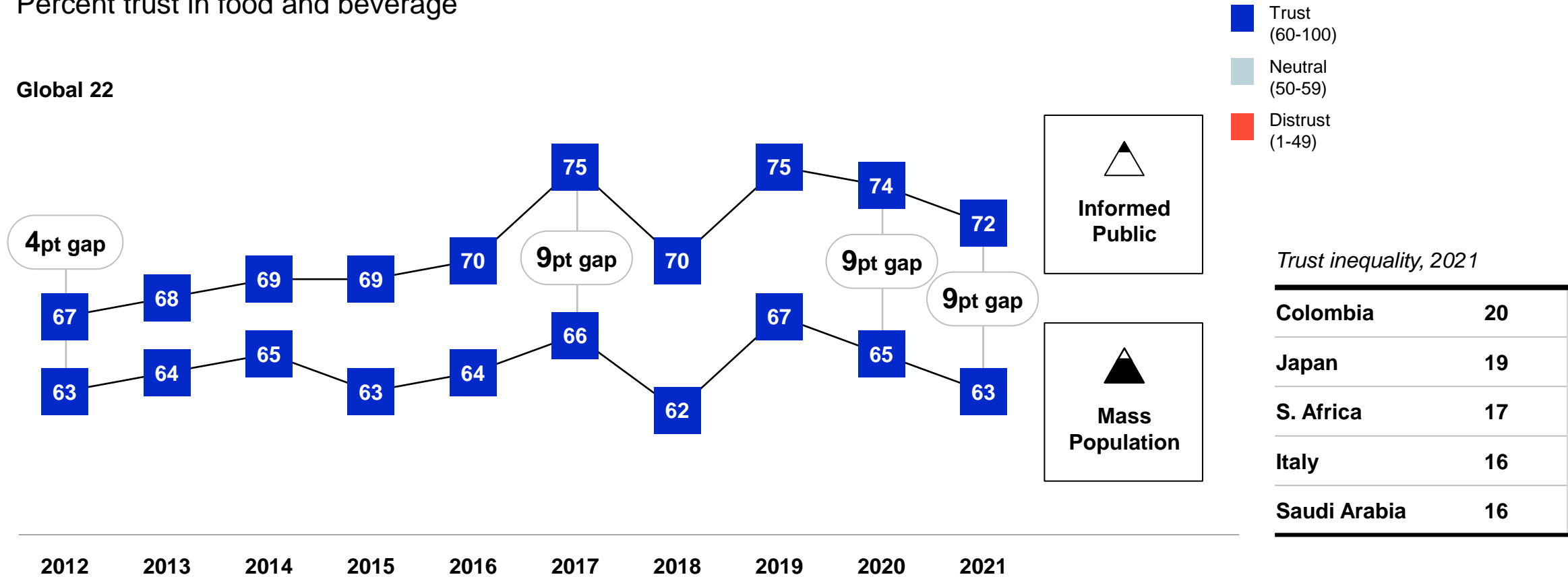


2021 Edelman Trust Barometer. TRU_SUB_FB.V. Now thinking about specific sectors within the food and beverage industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg.

CONTINUED HIGH INEQUALITY FOR FOOD AND BEVERAGE

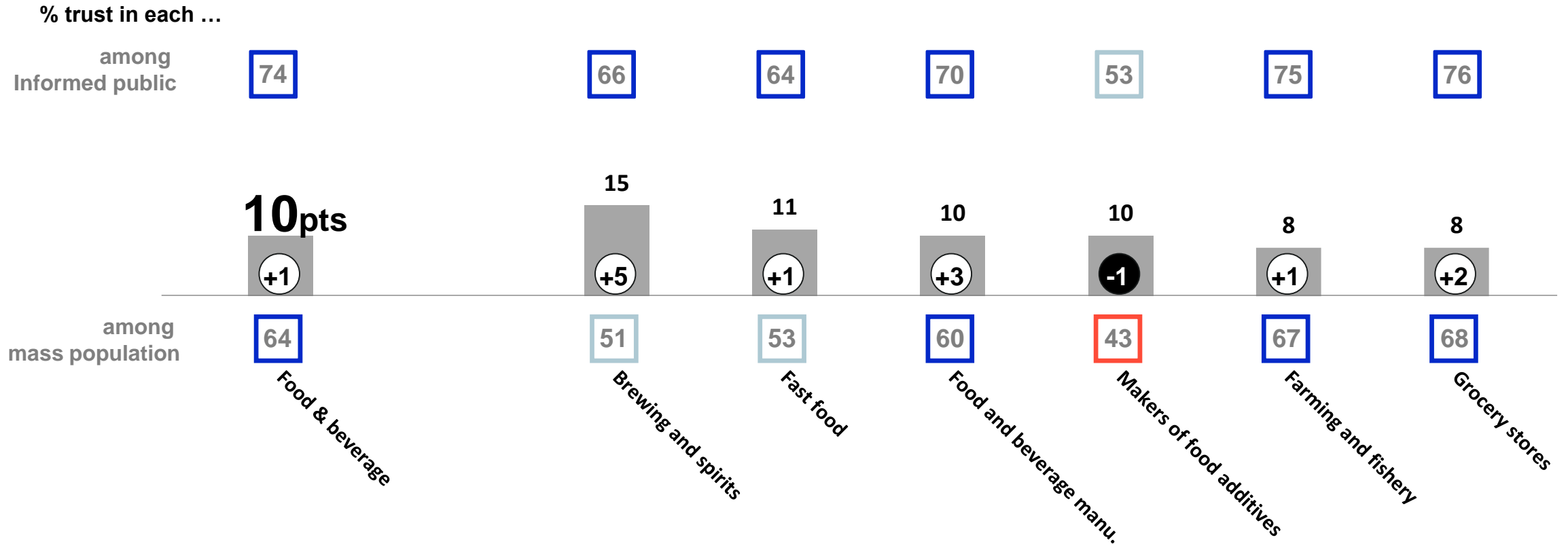
Percent trust in food and beverage

Global 22



INEQUALITY ALSO A REALITY FOR ALL SUBSECTORS

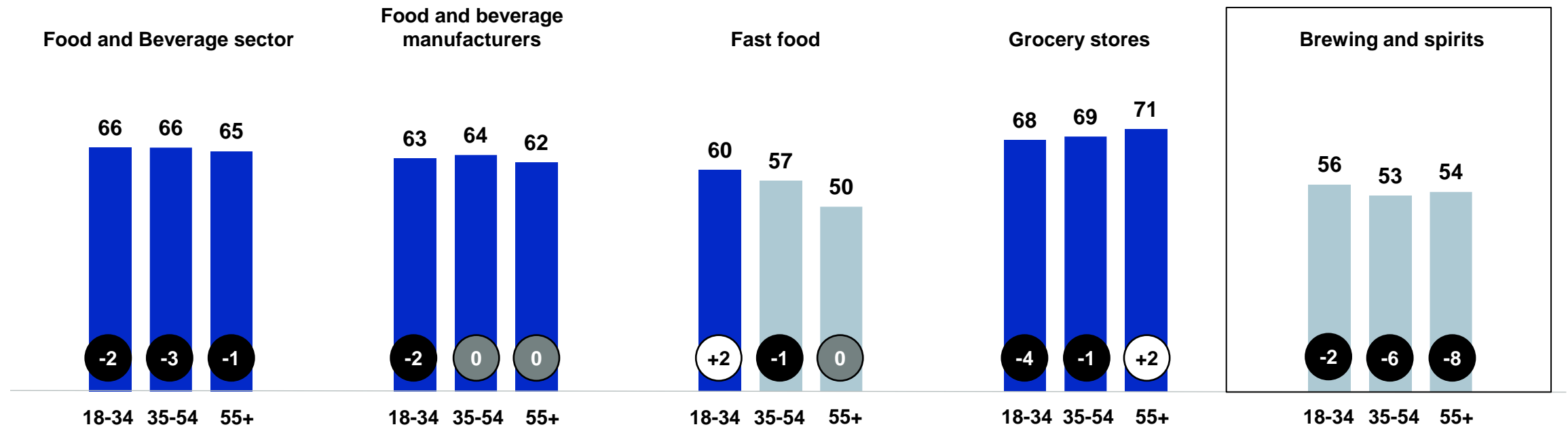
Percentage-point difference between sector and sub-sector trust among the informed public vs. the mass population



2021 Edelman Trust Barometer. TRU_IND. [FOOD AND BEVERAGE] 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. 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. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. Informed public and mass population, 27-mkt avg.

TRUST IN FOOD AND BEVERAGE AND SUBSECTORS LARGELY CONSISTENT ACROSS AGE GROUPS

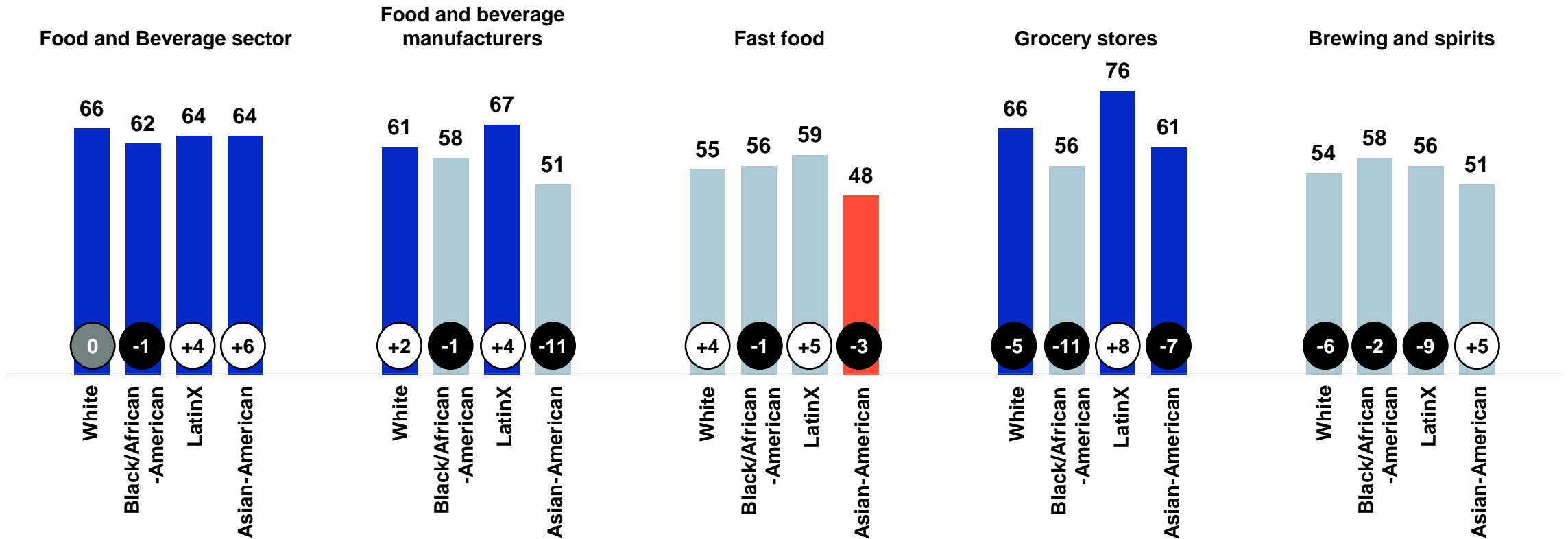
Percent trust




2021 Edelman Trust Barometer. TRU_IND. [FOOD AND BEVERAGE] 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. 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. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. General population, 27-mkt avg., by age.

IN THE U.S., NUANCED TRUST GAPS ACROSS ETHNICITIES; DIFFERENT TRUST LEVELS FROM SECTOR TO SUBSECTOR

Percent trust, in the U.S.



2021 Edelman Trust Barometer. TRU_IND. [FOOD AND BEVERAGE] 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. 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. 9-point scale; top 4 box, trust. Question asked of one-fifth of the sample. U.S., among Non-Hispanic White, Black, LatinX and Asian populations.



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IN 2021, F&B EMPLOYEES ARE KEY TO UNLOCKING TRUST

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AMID PANDEMIC, BIG TRUST INCREASES AMONG FOOD AND BEVERAGE EMPLOYEES

Percent trust in my employer, among sector employees

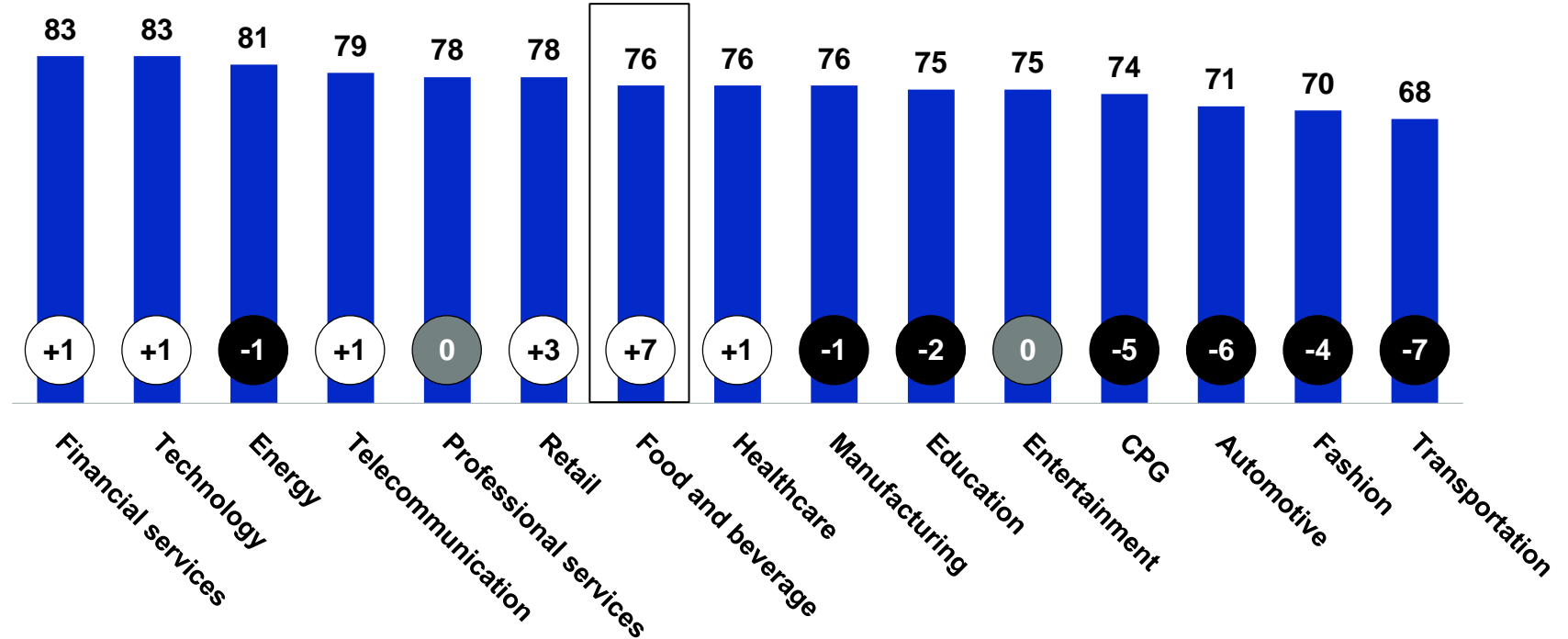


Among those employed in each of the following sectors..

All employees, global 27



Change, 2020 to 2021



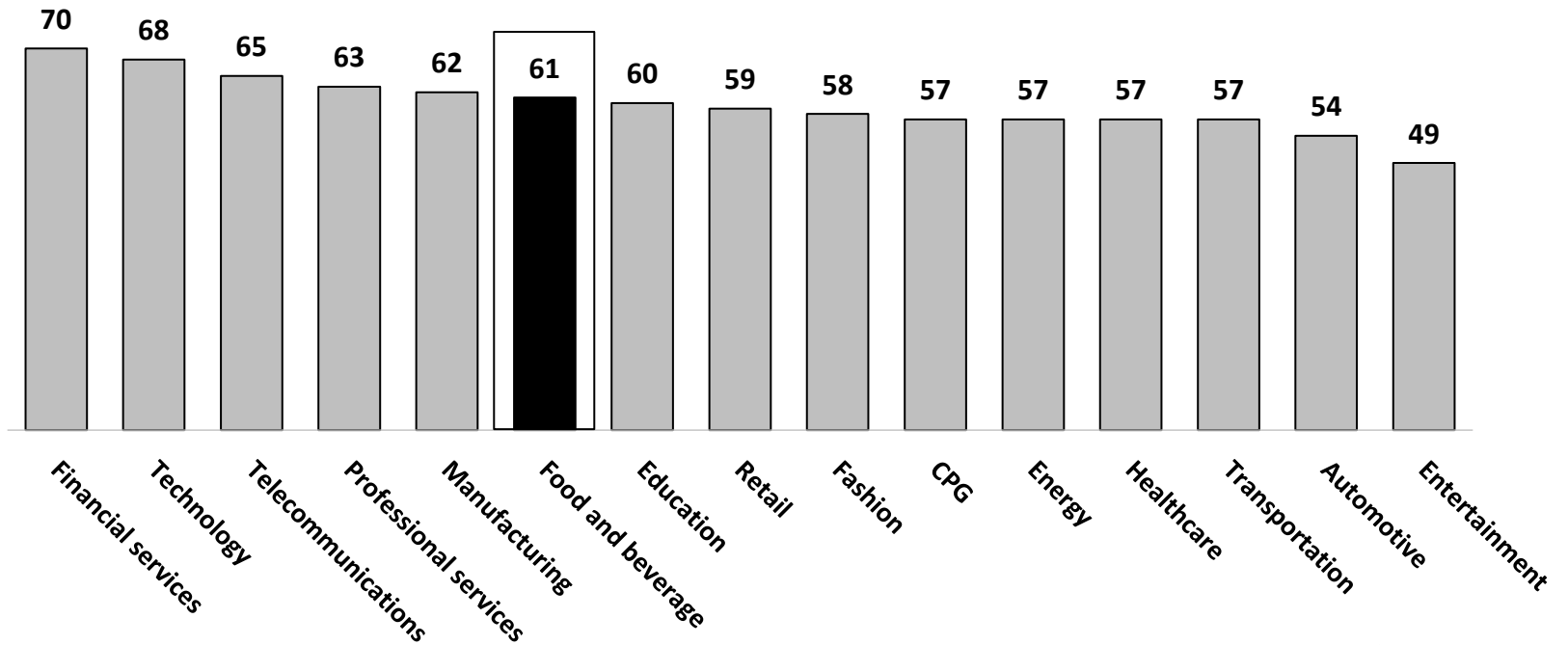
EMPLOYERS SEEN AS TRUSTED SOURCE OF INFORMATION

Percent who agree, among sector employees

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 in our country today

All employees, global 27

59%



EMPLOYER PURPOSE AND HAVING A VOICE MATTER EVEN MORE TO FOOD SECTOR EMPLOYEES

Change in importance since last year (more important minus less important,) among food and beverage employees

2021 Edelman Trust Barometer. EMP_IMP_VAL. When considering an organization as a potential place of employment, please indicate whether each of the following has become more important to you, less important to you, or has stayed the same in importance since last year. 5-point scale; top 2 box; more important; bottom 2 box, less important. Question asked of those who are an employee (Q43/1). General population, 27-mkt avg., and among food and beverage employees (Q43/1 AND Q420/8). Net change is the difference between more and less important.

<i>Change in importance as an employer attribute since the start of the year...</i>	<i>Net change</i>			
	All employees	Food employees	More Important	Less Important
Keep workers, customers safe	+49	+49	59	11
Regular employee communications	+44	+47	58	11
Do work that shapes the future	+40	+45	55	10
Include employees in planning and strategy	+38	+45	56	11

CONSUMERS AND EMPLOYEES EXPECTED TO HAVE A SEAT AT THE TABLE

Percent who agree

68%

Consumers ...

**have the power to force
corporations to change**

62%

Employees ...

51%

of food and
beverage employees

I am more likely now than a year
ago to voice my objections to
management or **engage in
workplace protest**



⌊

BUILDING RESILIENCE IN FOOD AND BEVERAGE THROUGH TRUST

⌋

“

As much as we need new thinking on global food system issues, we also need new doing.”

Danielle Nierenberg,
Food Tank



OPPORTUNITIES FOR FOOD & BEVERAGE

1.

Embrace innovation
with purpose
and passion

2.

Address the
trust gaps

3.

Step up and
make
a difference in
the here and now

5 SYSTEM GAPS HAVE EMERGED

as the key drivers (the root causes) behind the myriad of production, distribution & consumption issues

1

INNOVATION GAP

With cultures driven by quarterly earnings, many companies prioritize *product* innovation over *system* innovation

2

INCLUSION GAP

The communities most in need of system change are underrepresented in production and industry roles.

3

INFORMATION GAP

Food access is often framed in terms of distribution. Yet, people also need tools, transparency and information to make sustainable & nutritious choices.

4

INCENTIVE GAP

We have technology that can lessen environmental impact *now*. Yet, growers operating under tight margins have relatively few incentives to adopt them *now*.

5

INVESTMENT GAP

As investment *dollars* pour into synthetic bio and food tech, little *time* is invested in bringing people into the possibilities.

TRUST IN FOOD & BEVERAGE IS BUILT ONE INGREDIENT AT A TIME.

1

Take a hard look at where you stand

- Assess trust with all stakeholders in your own company and pinpoint areas of vulnerability
- Analyze each of the food system gaps. What problems can you credibly solve to build trust? Which gaps have the greatest connection with your business goals?

2

Empower employees at every step

- System gaps have connections across business functions. Make sure the entire organization is involved to create meaningful change.
- Ensure employees have ample opportunity to participate and co-create. They should be involved in assessing the gaps AND building your plan of action.

3

Lead with facts, act with empathy

- Ensure every commitment leads with the tangible actions you are taking now and in the future.
- Have the courage to provide straight talk but also empathize and address people's fears.

4

Provide trustworthy, collaborative content

- With actions in place, tell the story of what you're addressing. Remember the cry for truthful, unbiased, reliable information.
- Don't go it alone. Business, government, NGOs and others must find a common purpose and take collective action to solve societal problems. So, engage others along the way.