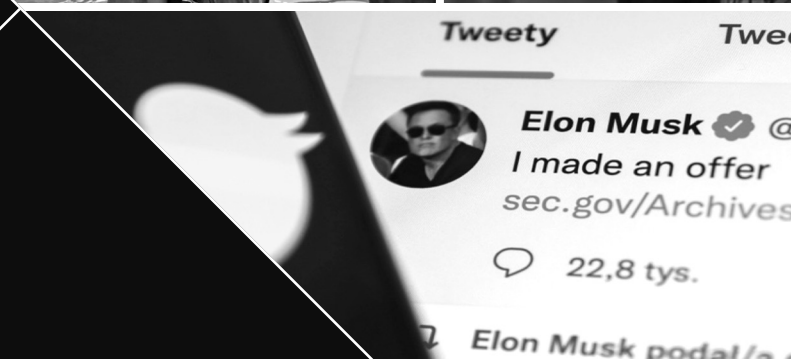


2023 Edelman Trust Barometer

Insights for Food
and Beverage



2023 Edelman Trust Barometer

Methodology

Annual online survey in its 23rd year

Fieldwork conducted: Nov 1 – Nov 28, 2022



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

Russia, part of the Edelman Trust Barometer from 2007 to 2022, was not included in this wave

**The sample size varies by country from 1,082 to 1,500.
27-market global data margin of error: General population +/- 0.6 percentage points (n=31,171)
Country-specific data margin of error: General population +/- 2.5 to 3.0 percentage points (varies by country based on sample size, n=1,082 to n=1,500)

Global averages

These vary based on the number of countries surveyed each year:

GLOBAL 27

*To protect the stability of the global average, Sweden will not be included in the average until there are at least two years of recent data

GLOBAL 25 Excludes China and Thailand

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

Statistical significance



All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level

For more details on global averages and country-specific methodology, please refer to the Technical Appendix

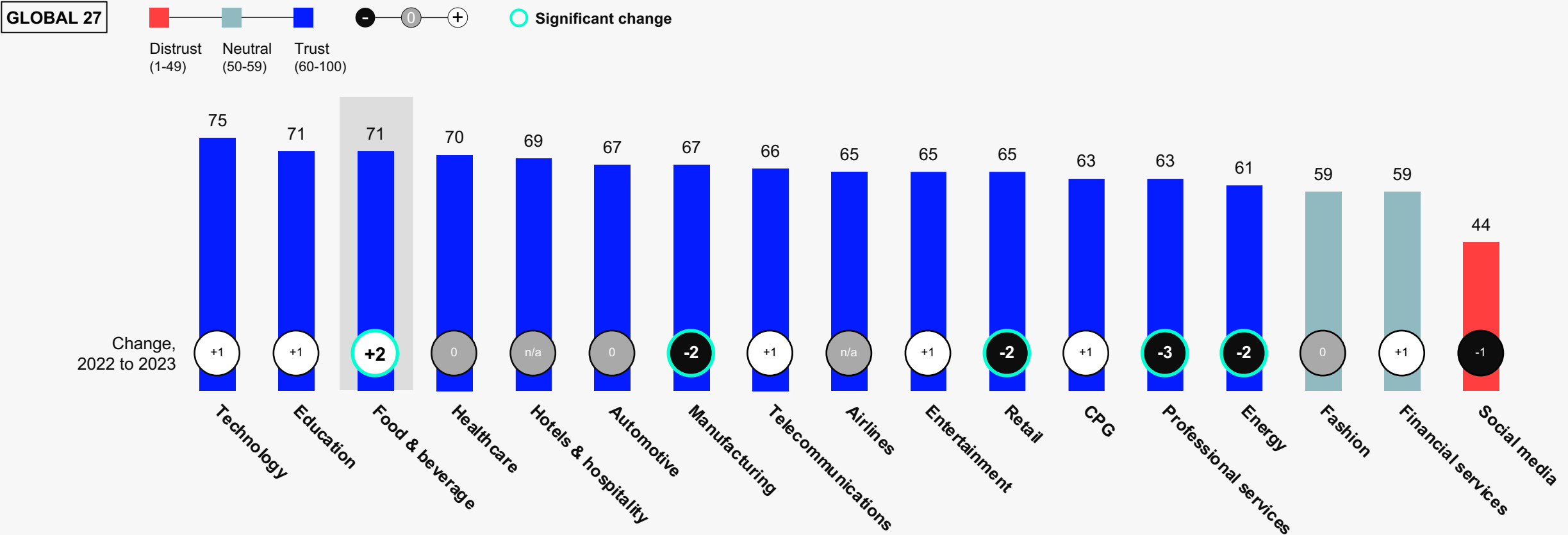


Trust Gains for Food and Beverage Not Shared Equally



Food and Beverage Among Most Trusted Sectors, Despite A Troubling Year

Percent trust

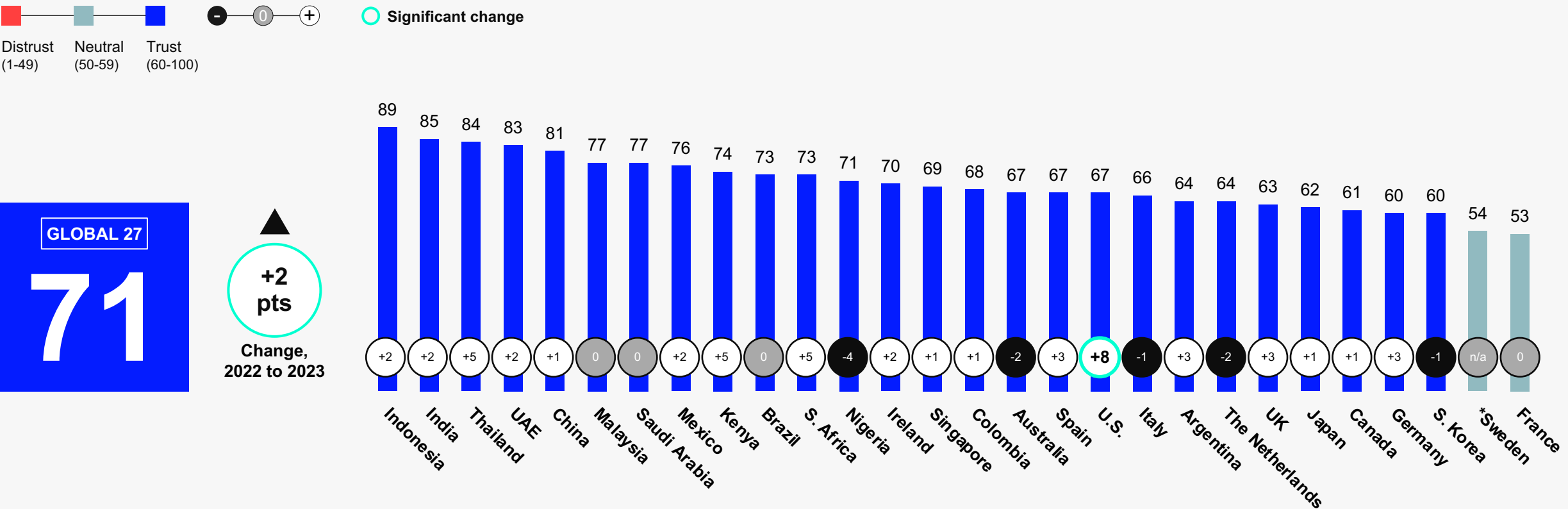


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Trust in the Food and Beverage Sector Increases in 18 of 27 Countries

Percent trust

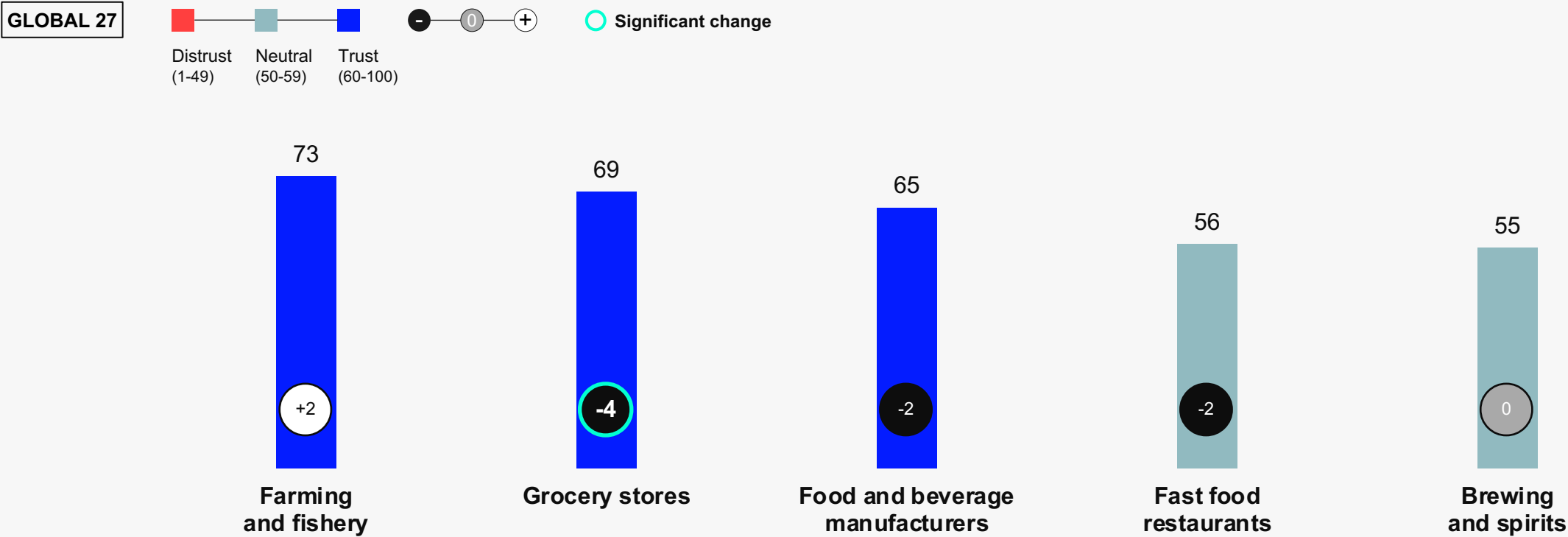


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg.
*Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Food and Beverage Subsectors: Greatest Trust Decline for Grocery Stores

Percent trust

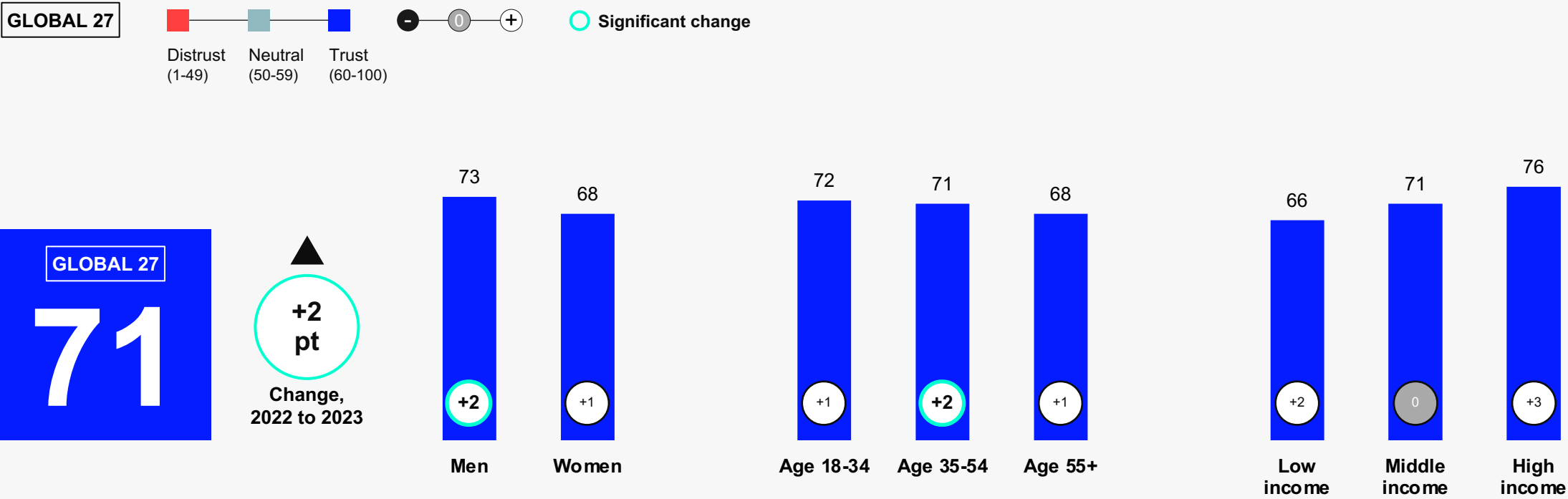


2023 Edelman Trust Barometer. TRU_SUB_FBV. Now thinking about specific sectors within the food industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Globally, Food and Beverage Sector Less Trusted By the More Vulnerable

Percent trust

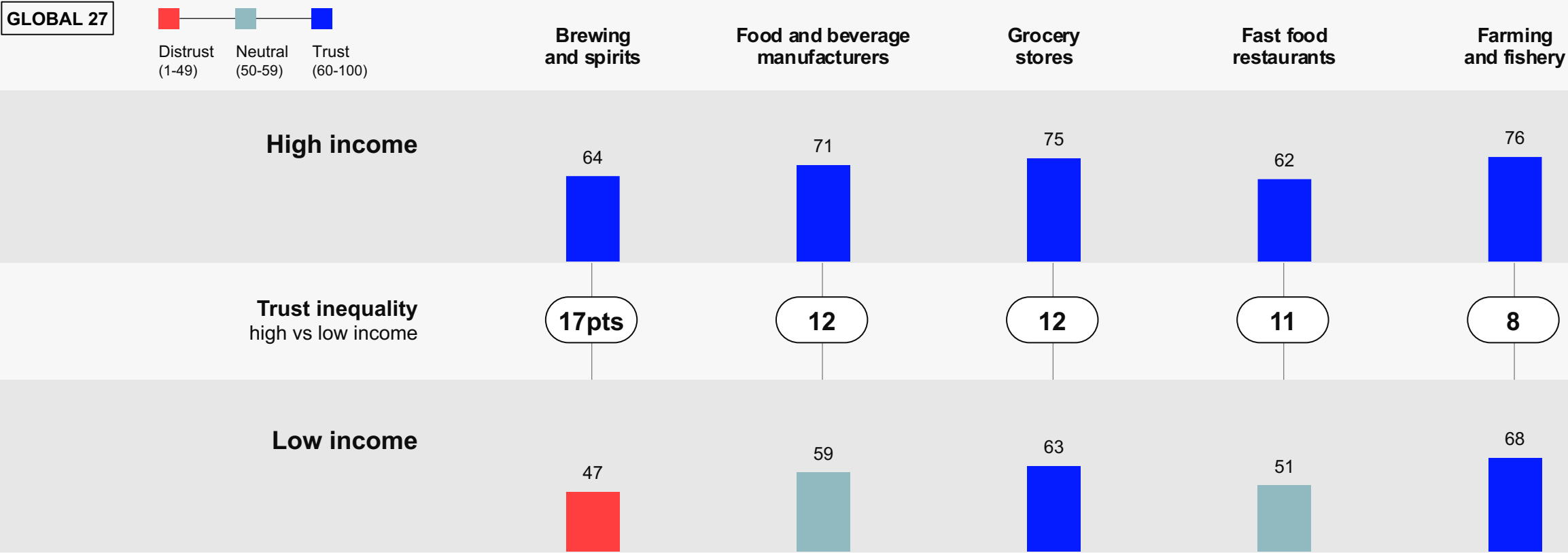


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. General population, 27-mkt avg by gender, age and income. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Most Food Subsectors Not Trusted Among Those With Low Income

Percent who say



2023 Edelman Trust Barometer. 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. General population, 27-mkt avg by income.

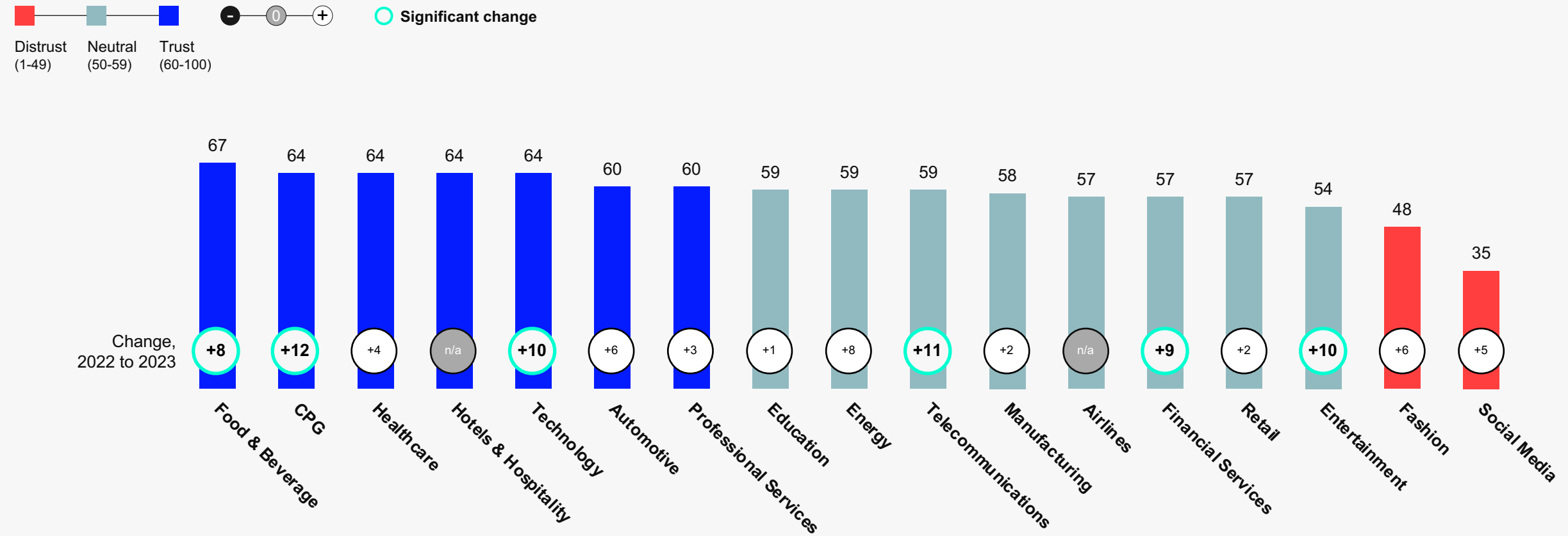


U.S. Trust Deep Dive



In the U.S., Trust Rises Across All Industry Sectors

Percent trust, in the U.S.

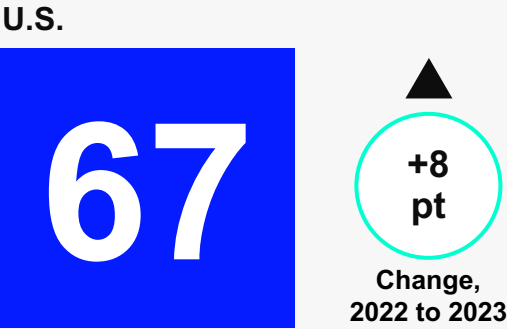
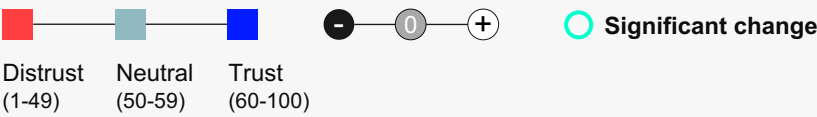


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, U.S. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

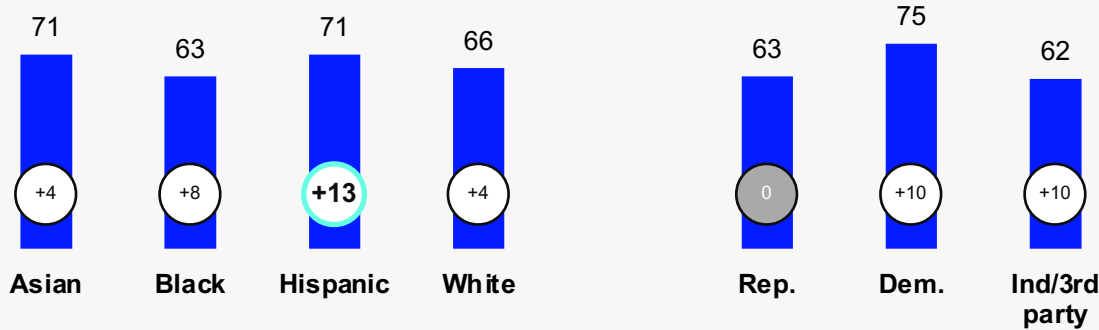


U.S. Trust in Food and Beverage Sector Rises — Unevenly — Across Demographics

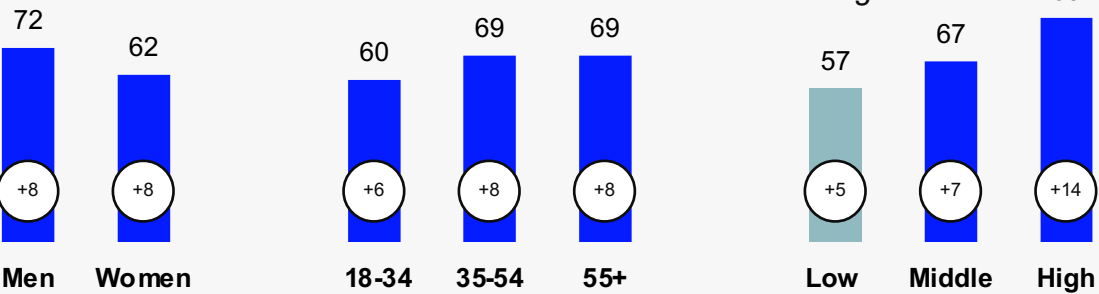
Percent trust in the U.S.



Communities | Political affiliation



Gender | Age | Income



26pt trust gap between low and high income

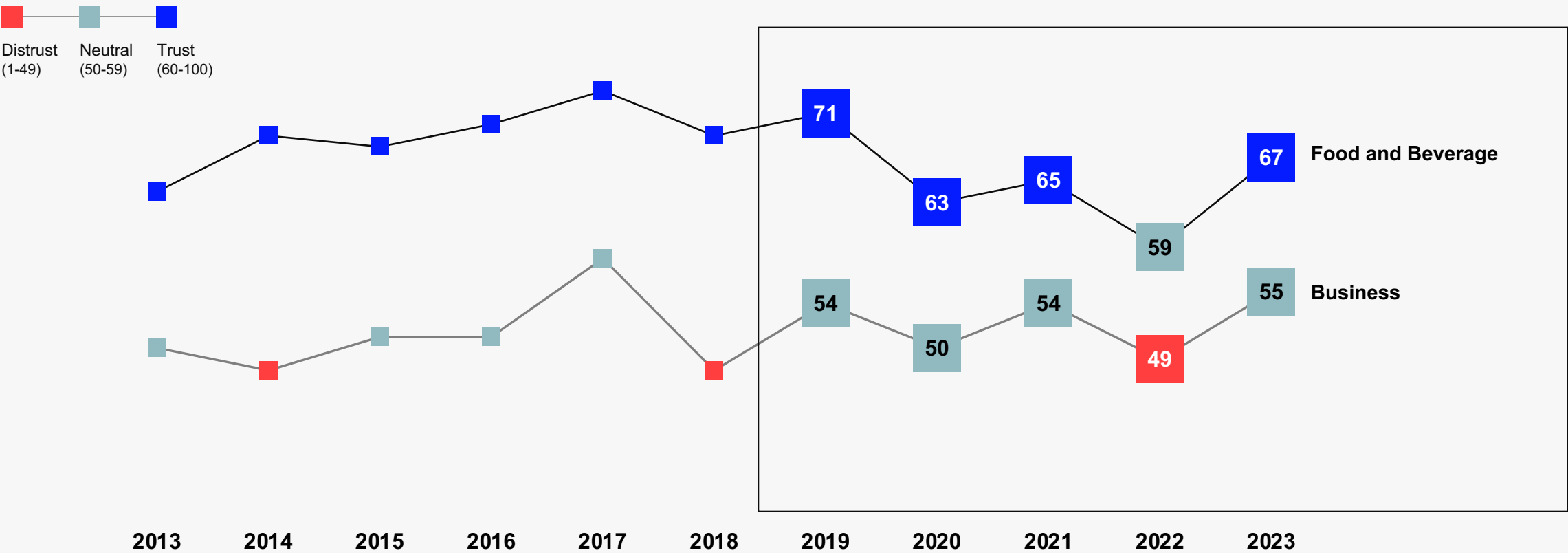


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. General population, U.S. by gender, age, income, ethnic communities and political affiliation. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



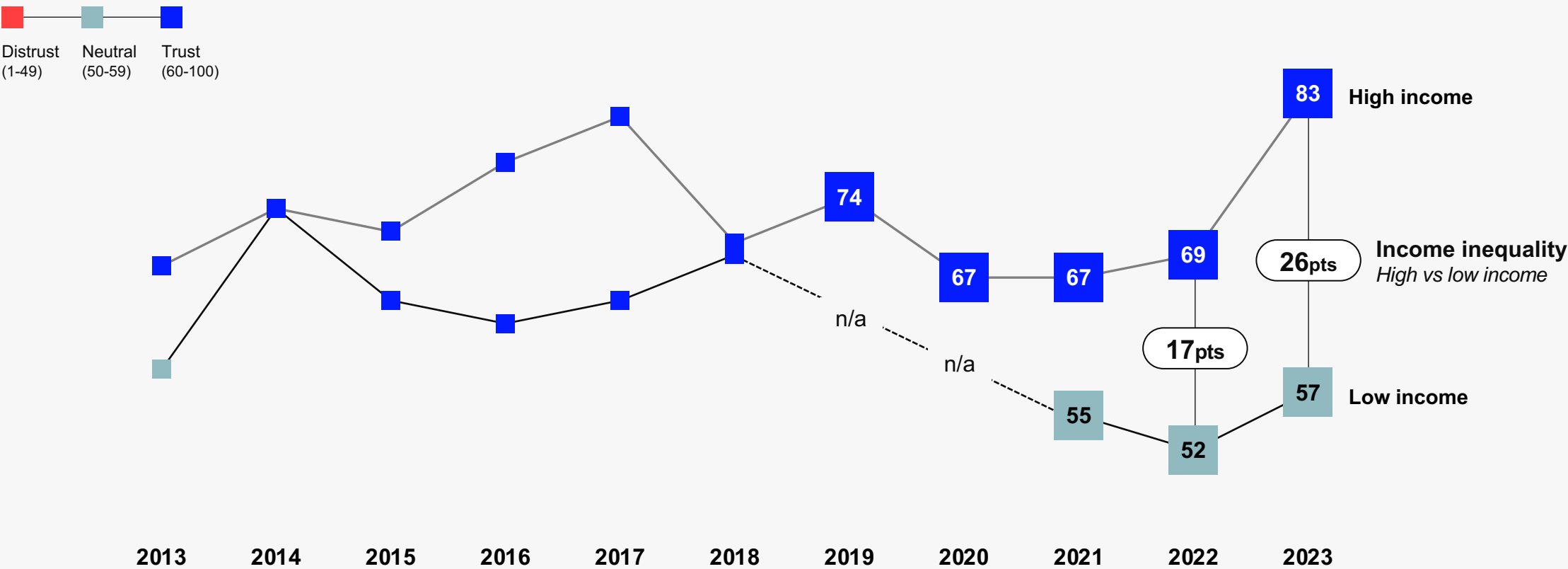
U.S. Trust in Food and Beverage Still Below Pre-Pandemic Trust Highs

Percent trust in food and beverage sector, in the U.S.



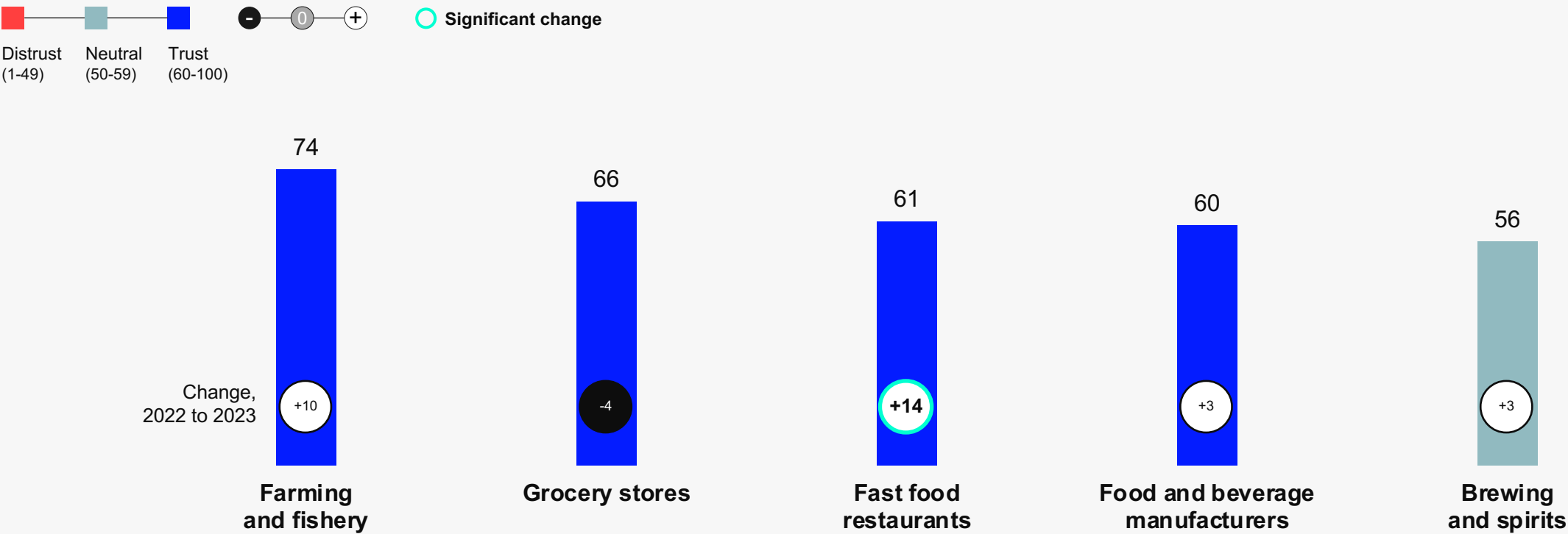
Record High Income-Based Trust Inequality in the U.S.

Percent trust in food and beverage sector, in the U.S.



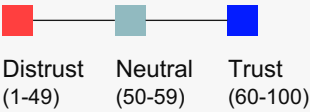
U.S. Food and Beverage Subsectors: Greatest Trust Decline for Grocery Stores

Percent trust, in the U.S.



U.S. Trust in Food and Beverage Subsectors: 10 Year Trend

Percent trust, in the U.S.



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10yr change
Farming and fishery	-	-	69	70	74	72	70	65	65	64	74	-
Grocery stores	-	-	-	75	81	75	75	72	66	70	66	-
Fast food restaurants	-	55	53	58	66	57	55	54	55	47	61	-
Food and beverage manufacturers	-	68	64	71	74	69	68	60	61	57	60	-
Brewing and spirits	-	-	-	59	71	70	66	61	55	53	56	-

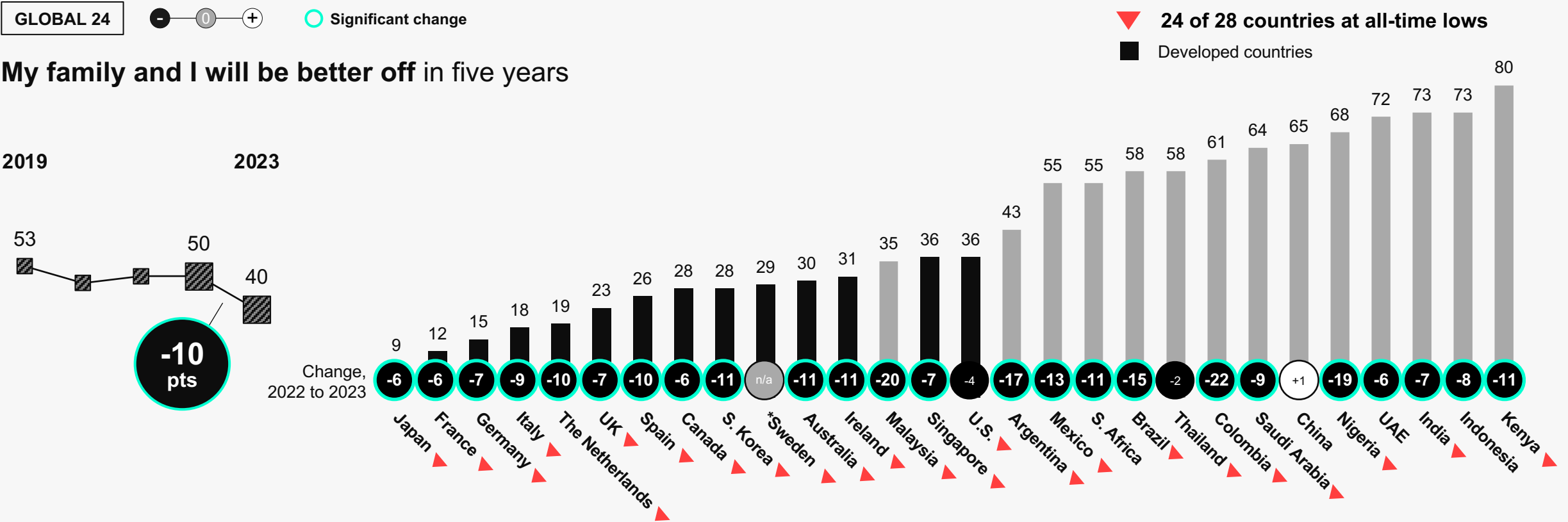


A Need for a Fair Vision for the Future of Food



Economic Optimism Collapses

Percent who say



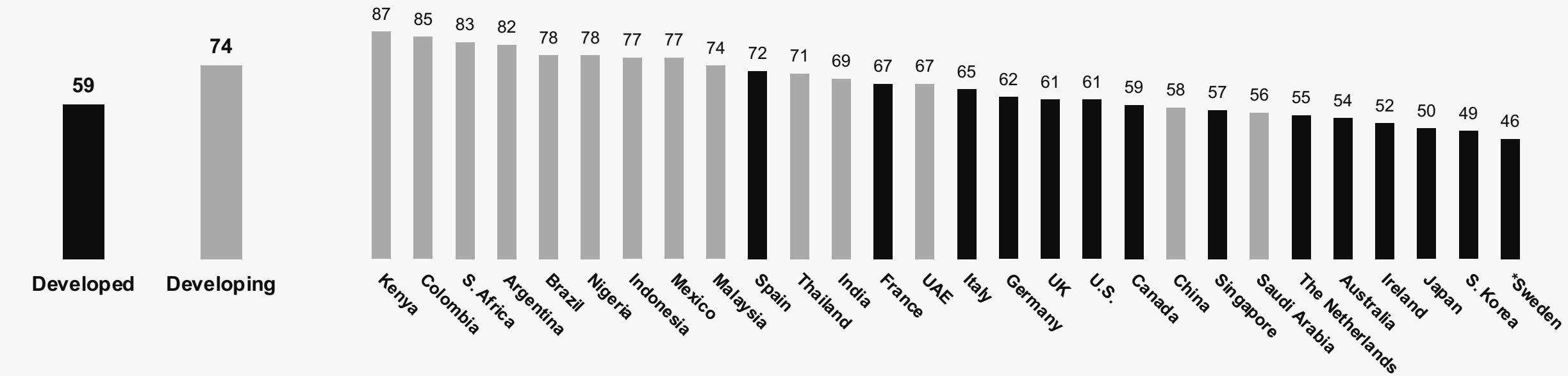
2023 Edelman Trust Barometer. CNG_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. General population, 24-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Both Developed and Developing World Highly Concerned About Food Shortages

Percent who worry

Food shortages leading to hoarding, riots, and hunger



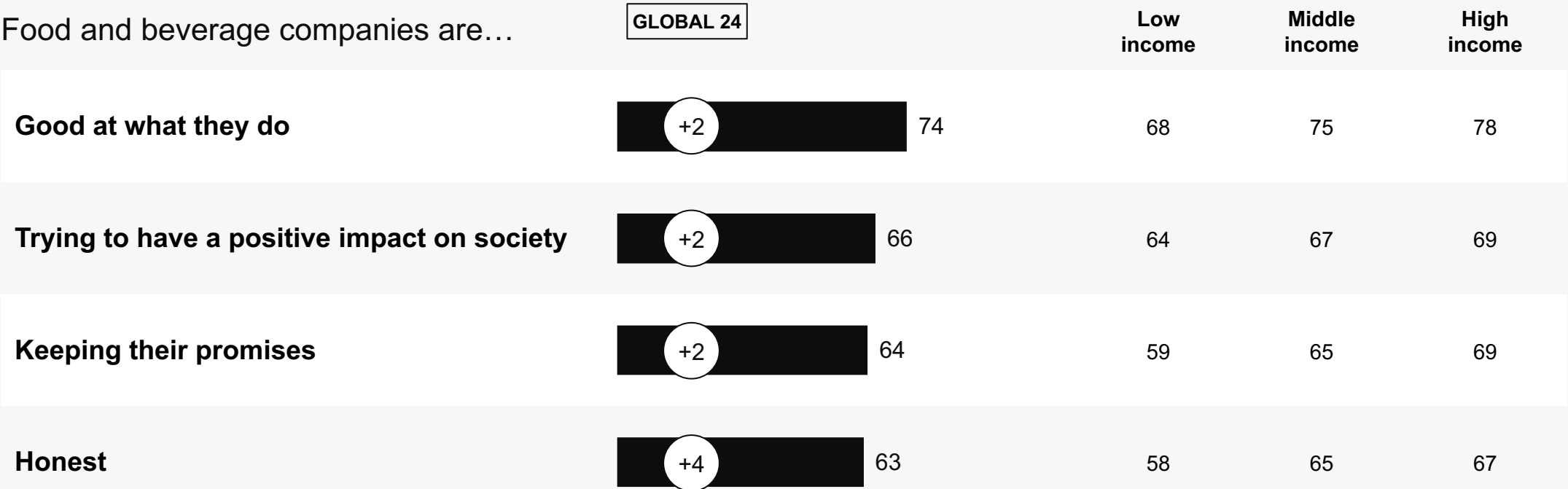
2023 Edelman Trust Barometer. POP_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Some attributes asked of half of the sample. General population, 27-mkt avg and by developed and developing regions.



Low Income Least Convinced Food and Beverage Companies are Competent, Purpose-Driven, Honest and Dependable

Percent who agree

Change, 2019 to 2023



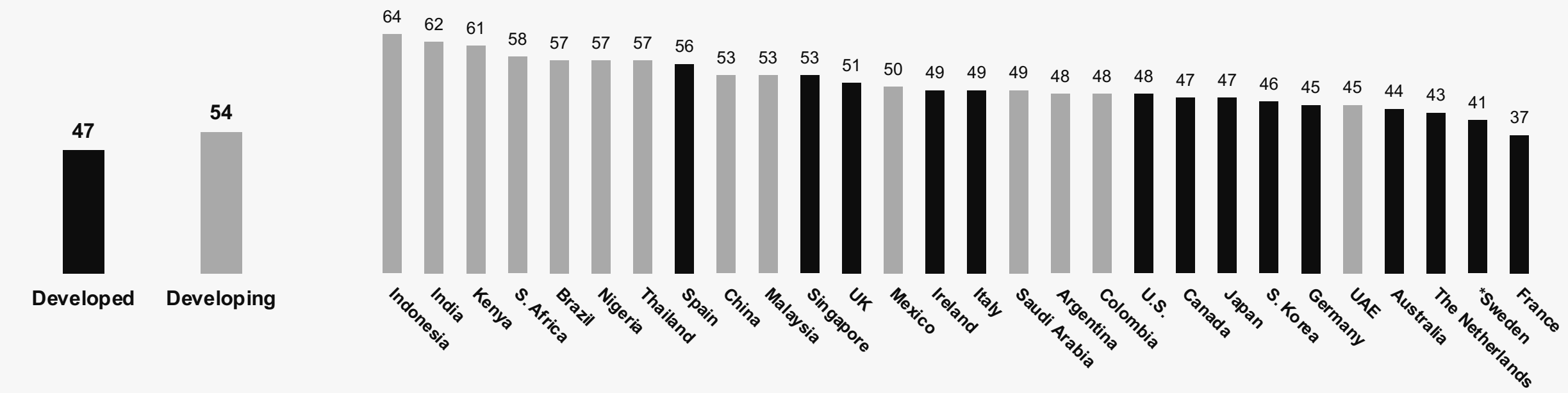
2023 Edelman Trust Barometer. TRU_3D_FBV. To what extent do you agree with the following statements in regards to food and beverage companies? 7-point scale; top 3 box, agree. Question shown to one-fifth of the sample. General population, 24-mkt avg and by income.



Most Unsure of Food and Beverage Sector Vision for Future

Percent who say

Food and beverage companies **have a vision for the future I believe in**



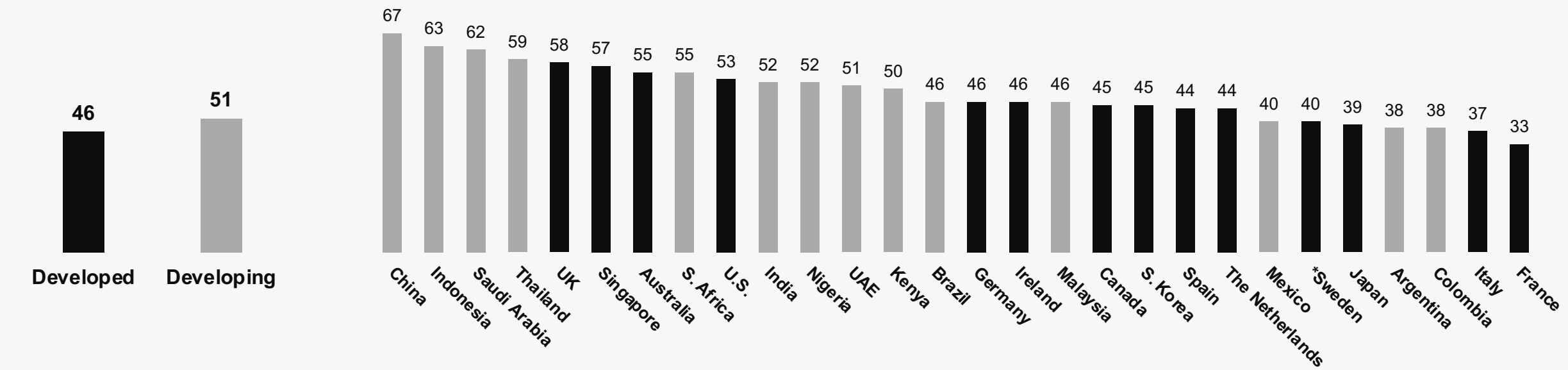
2023 Edelman Trust Barometer. FBV_PER_DIM. In thinking about why you do or do not trust food and beverage companies, please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive. Question shown to one-fifth of the sample. General population, 27-mkt avg and by developed and developing regions. *Sweden is not included in the global average.



Majority Unconvinced Food and Beverage Sector are Fair and Inclusive

Percent who say

Food and beverage companies **serve the interests of everyone equally and fairly**



2023 Edelman Trust Barometer. FBV_PER_DIM. In thinking about why you do or do not trust food and beverage companies, please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive. Question shown to one-fifth of the sample. General population, 27-mkt avg and by developed and developing regions. *Sweden is not included in the global average.



Strengthening Trust in Food and Beverage

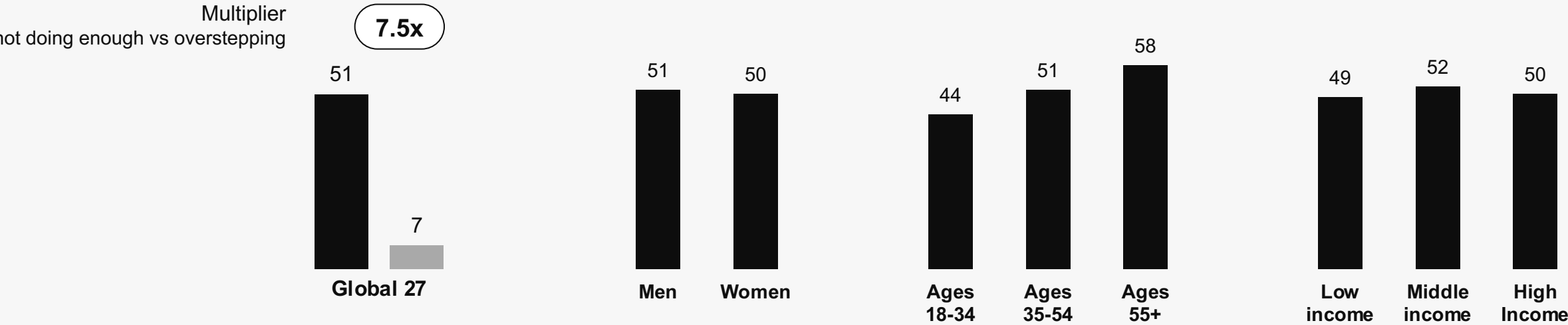
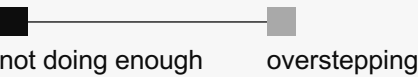


Want More Engagement in Addressing Food Shortages, Not Less

Percent who say

GLOBAL 27

On addressing **food shortages**, business is



2023 Edelman Trust Barometer. BUS_BND. Think about business as an institution, and its current level of engagement in addressing societal needs and issues. When it comes to each of the following areas, please indicate if you think business is going too far and overstepping what it should be doing, is doing just the right amount in regard to this activity, or is not going far enough in its actions and should be doing more. 3-point scale; code 3, “not doing enough”; code 1, “overstepping”. General population, 27-mkt avg and by gender, age and income. The multipliers are rounded to the nearest .5.



Best Societal Outcomes When Government and Business Work Together

Percent who say

GLOBAL 25 Excludes China and Thailand

Approach most likely to result in constructive action

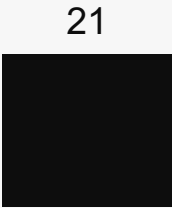
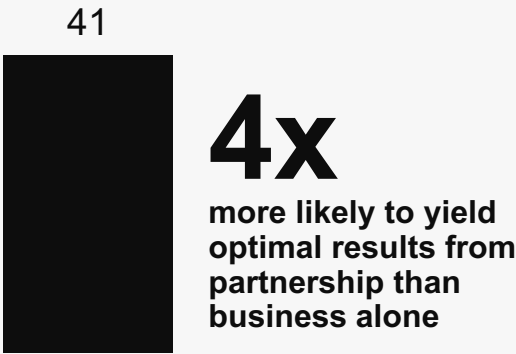
averaged across climate change, discrimination, immigration, employee treatment, and income inequality

Government and business working in partnership

Both working independently

Government only working alone

Business only working alone



Climate change	47	20	12	9
Discrimination	39	22	17	10
Immigration	38	21	21	9
Employee treatment	43	22	14	12
Income inequality	40	22	17	10

2023 Edelman Trust Barometer. GOV_VS_BUS1. For each of the societal issues listed below, please indicate which of the following is the most likely to result in your country being able to work through any ideological divisions that exist regarding the issue and take constructive action to address it. 5-point scale; code 5, government and business working in partnership; code 2, government and business working independently; code 3, government working alone; code 4, business working alone. Question asked of half of the sample. General population, 25-mkt avg. Data not collected in China and Thailand. Data is rebased to exclude those that said, “don’t know” and is showing an average of five issues.



Trustworthy Information Insulates Business Action from Politicization

Among the 48% who say it is possible for a business to address societal issues without being seen as politicized, percent who say

To avoid being seen as politically motivated when taking a stand:

GLOBAL 27



2023 Edelman Trust Barometer. ENG_ISS_HOW. You just said that it is possible for a business to engage in addressing contentious societal issues in ways that you would not consider to be political or politically motivated. Which of the following would be ways that a company could do that? Pick all that apply. Question asked among those who said it is possible for a business to engage in addressing issues that would not be considered political (ENG_ISS/6-9). General population, 27-mkt avg.



CEOs Need To Improve Economic Optimism: Invest in Fair Compensation, Local Communities, Skills Training

Percent who say

CEOs are obligated to ...

GLOBAL 27

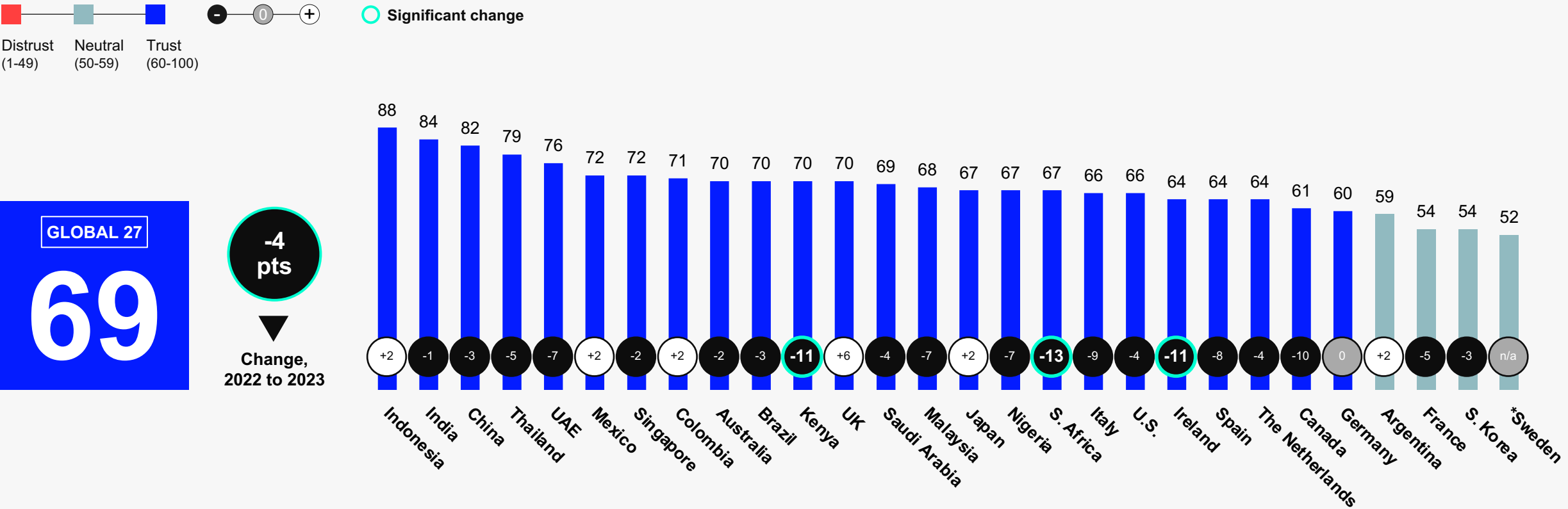


Supplemental Data



Food and Beverage Subsector: Trust in Grocery Stores Decreases in 20 of 27 Countries

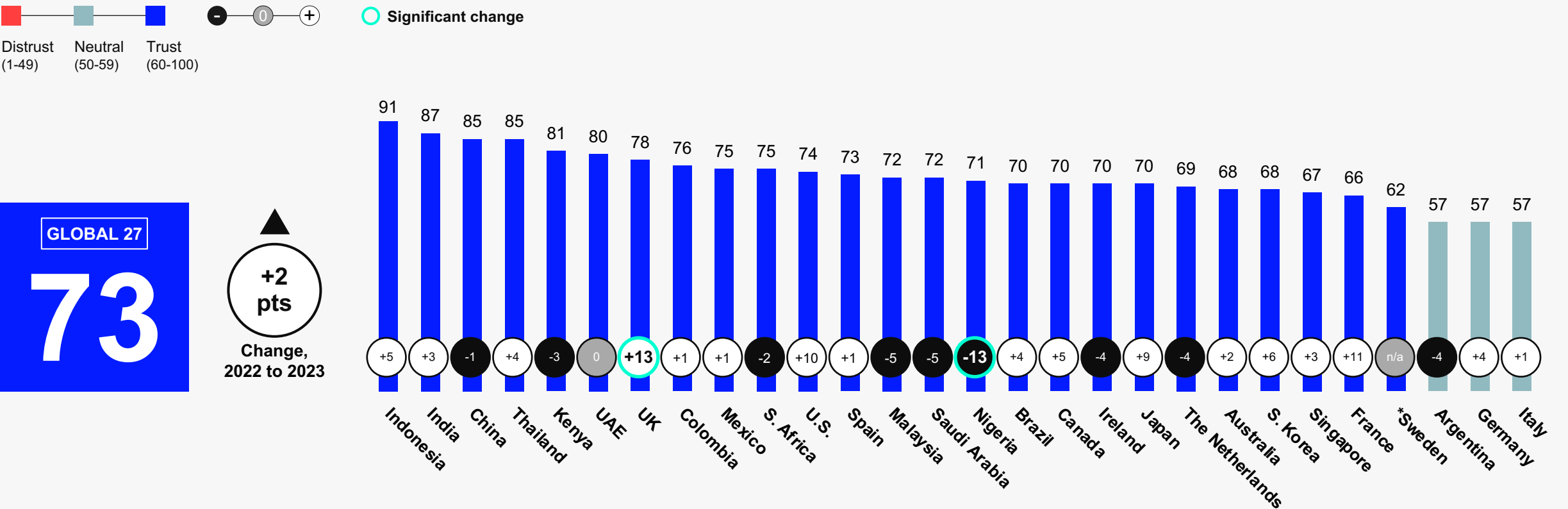
Percent trust



2023 Edelman Trust Barometer. 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. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Food and Beverage Subsector: Trust in Farming and Fishery Increases in 17 of 27 Countries

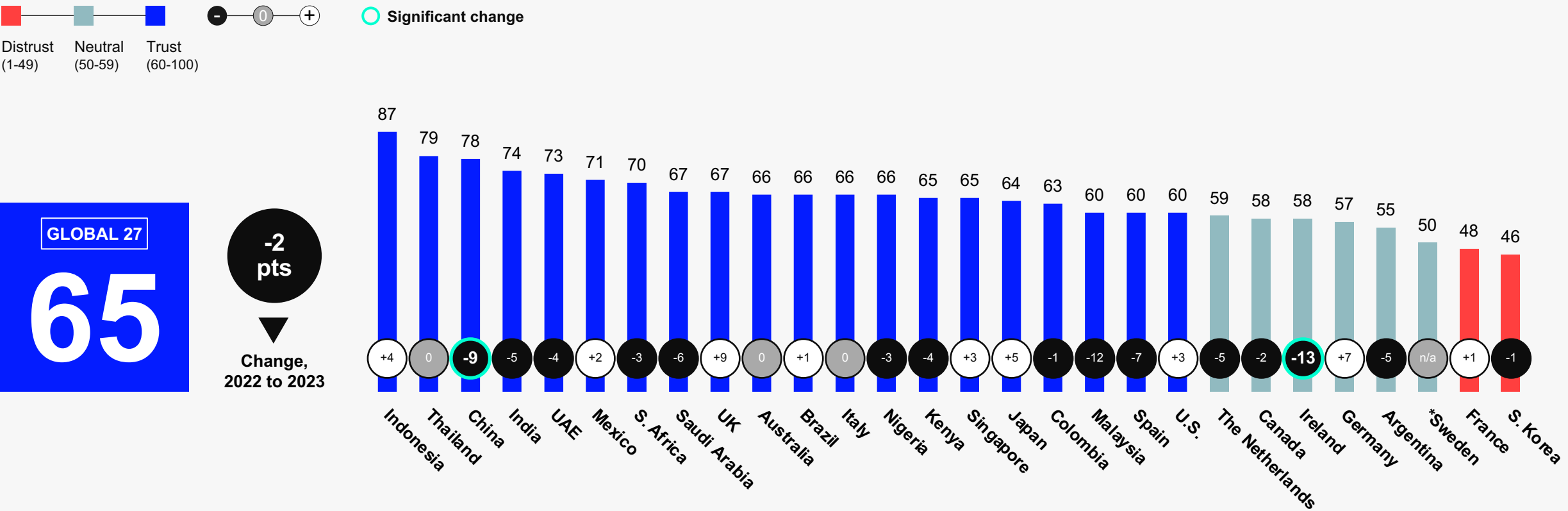
Percent trust



2023 Edelman Trust Barometer. 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. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Food and Beverage Subsector: Trust in Food and Beverage Manufacturers Decreases in 15 of 27 Countries

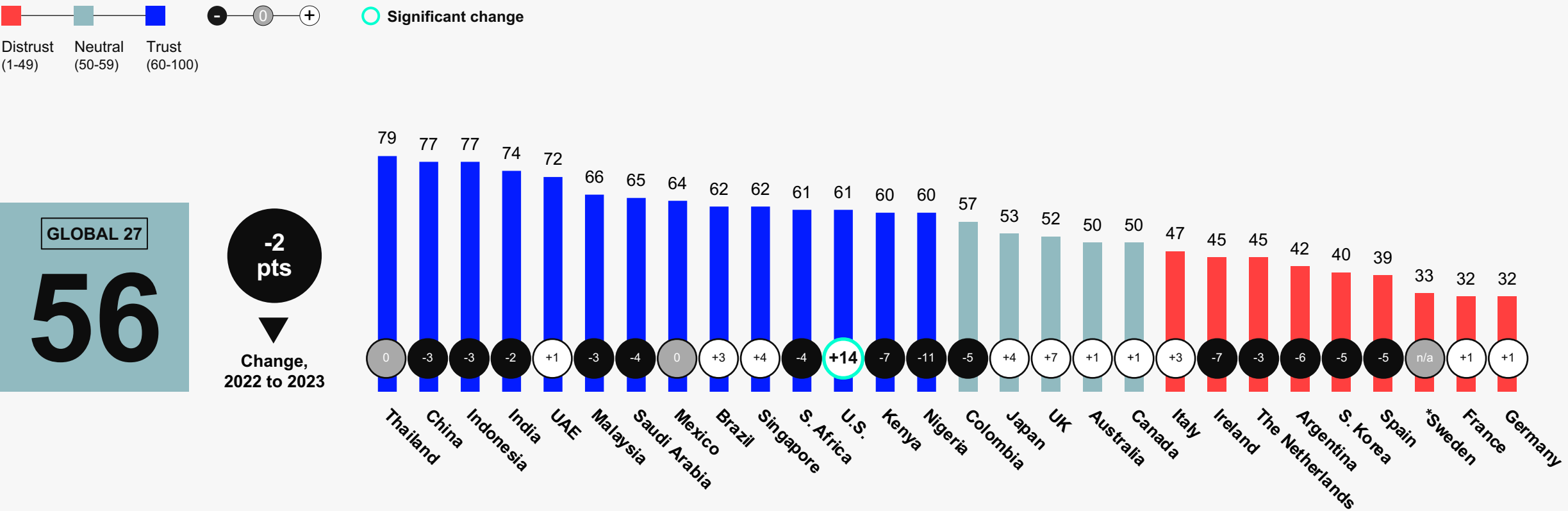
Percent trust



2023 Edelman Trust Barometer. 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. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Food and Beverage Subsector: Trust in Fast Food Restaurants Decreases in 14 of 27 Countries

Percent trust

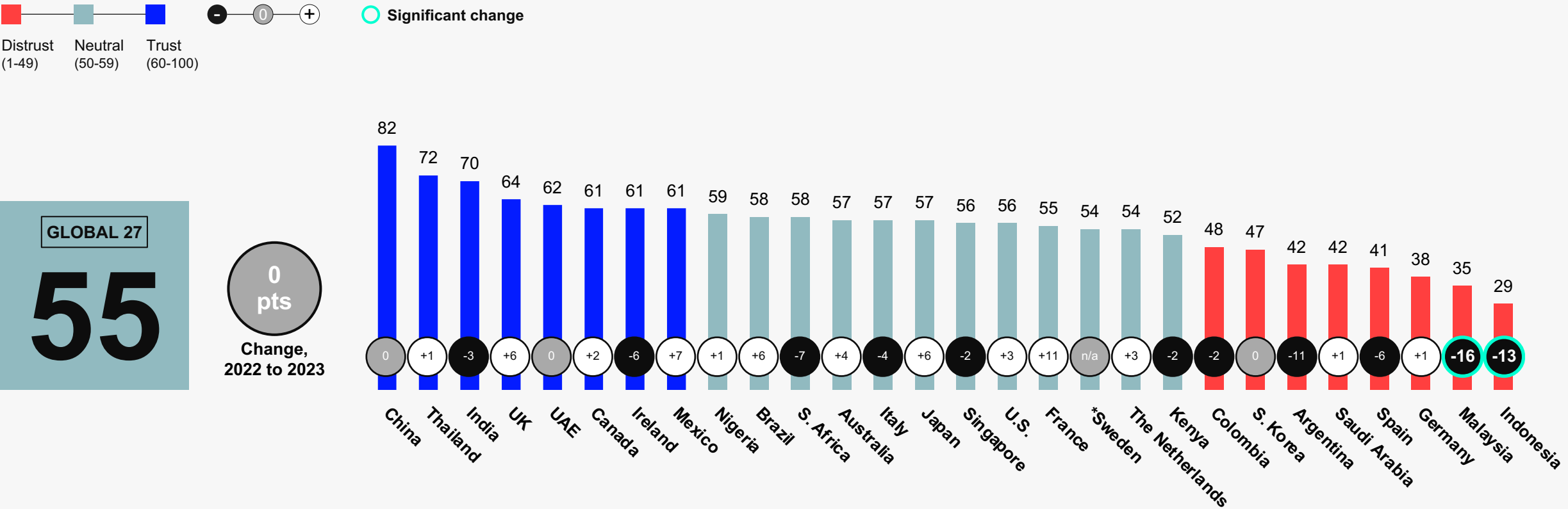


2023 Edelman Trust Barometer. TRU_SUB_FBV. Now thinking about specific sectors within the food industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Food and Beverage Subsector: Brewing and Spirits Not Trusted in 20 of 28 Countries

Percent trust

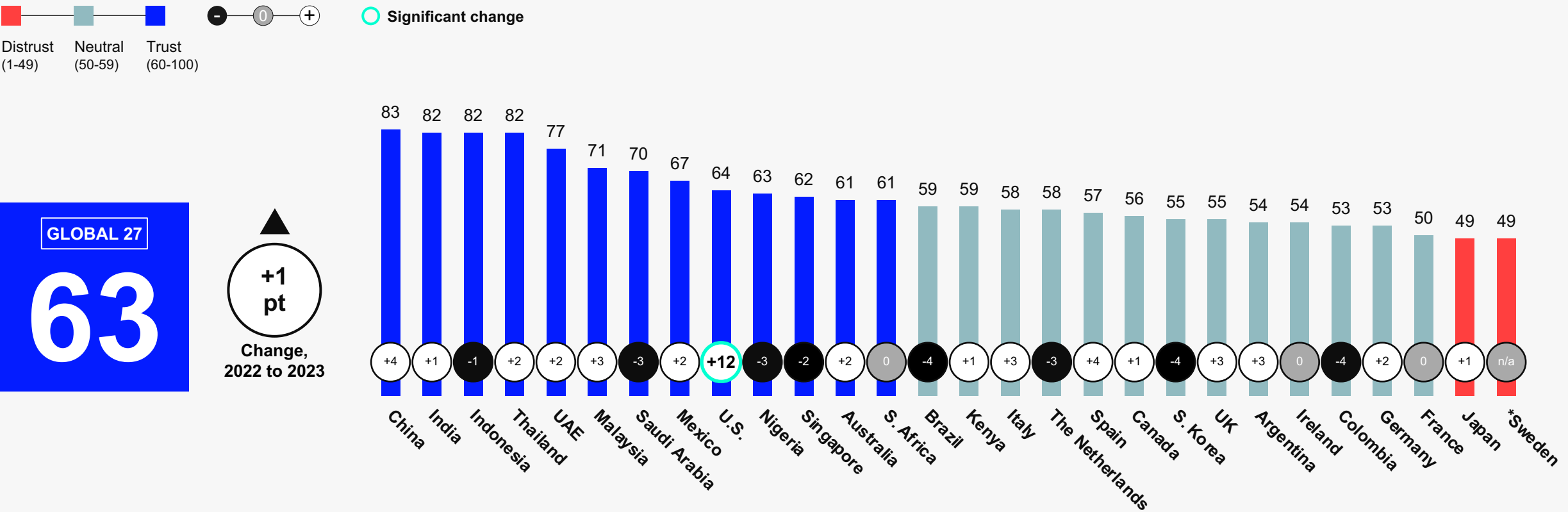


2023 Edelman Trust Barometer. TRU_SUB_FBV. Now thinking about specific sectors within the food industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Trust in the Consumer Packaged Goods Sector Increases in 16 of 27 Countries

Percent trust

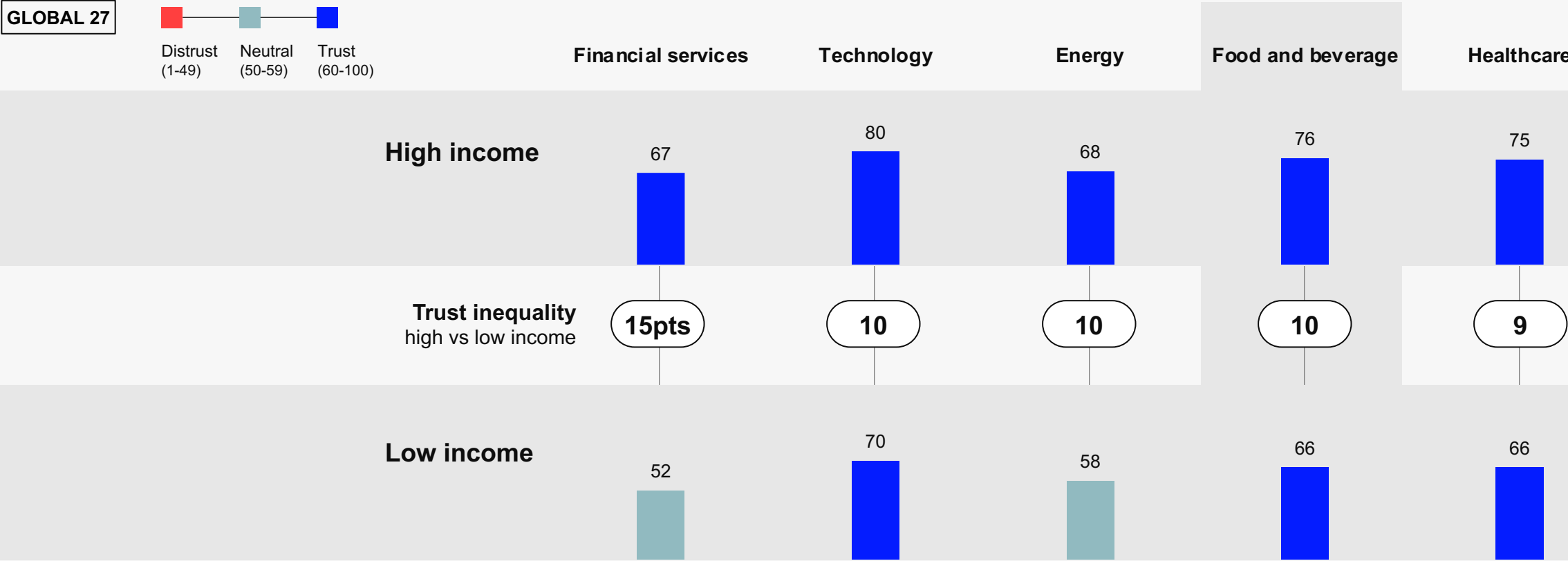


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg.
*Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



Double-Digit Income-Based Trust Inequality for the Food and Beverage Sector

Percent who trust

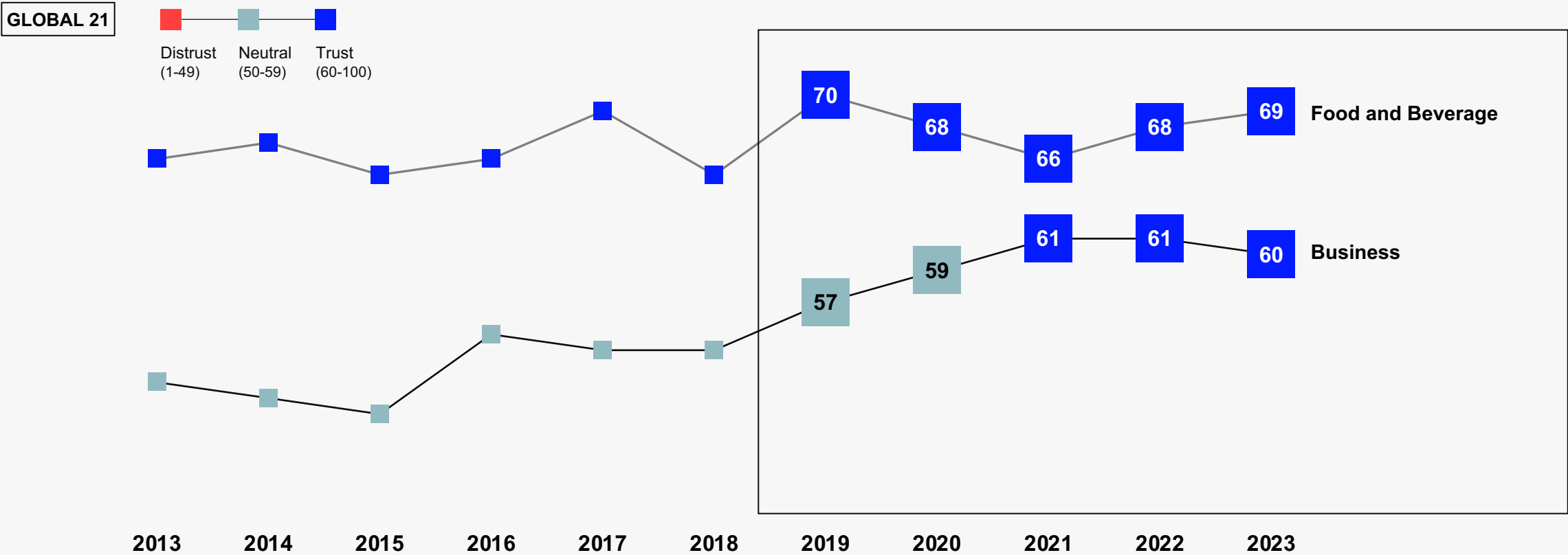


2023 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg by income.



Trust in Food and Beverage Still Below Pre-Pandemic Trust Highs

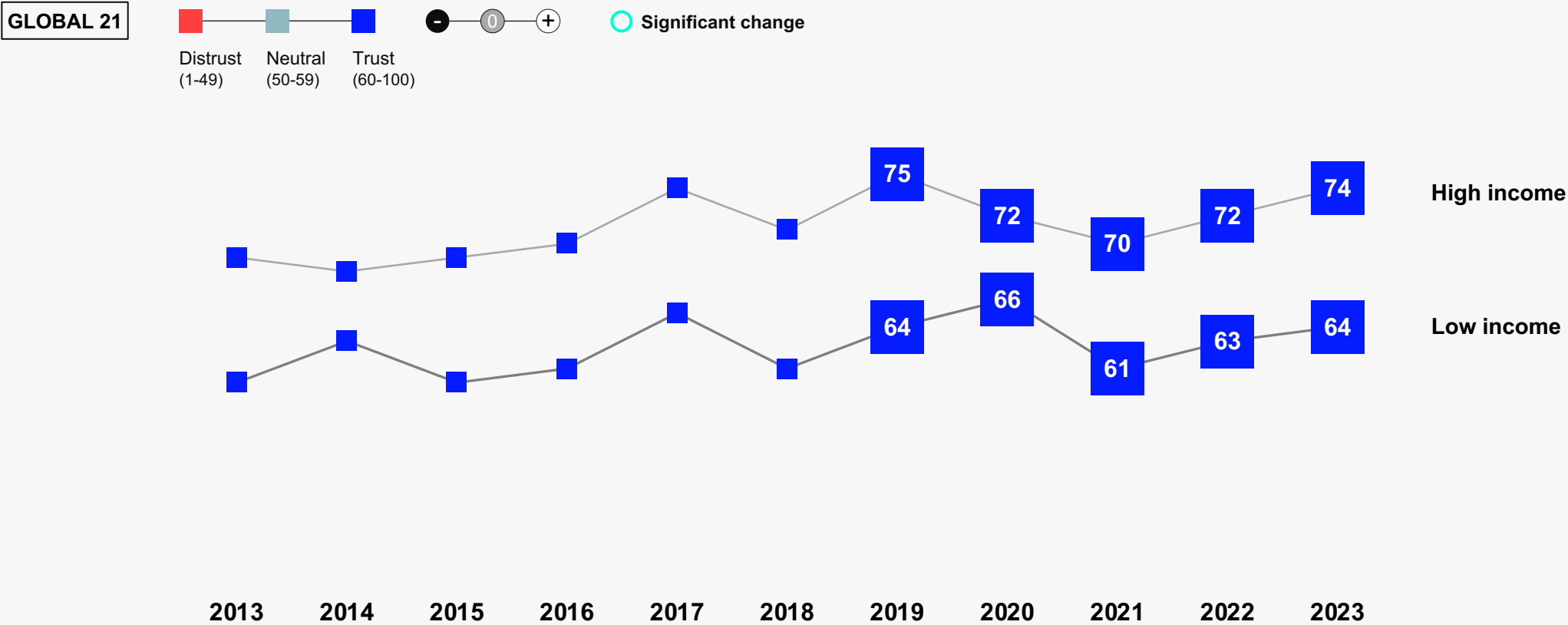
Percent trust in food and beverage sector vs trust in business



2023 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. 9-point scale; top 4 box, trust. 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, 21-mkt avg.

Income-Based Trust Inequality Continues in Food and Beverage Sector

Percent trust in food and beverage sector



2023 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, 21-mkt avg by income.

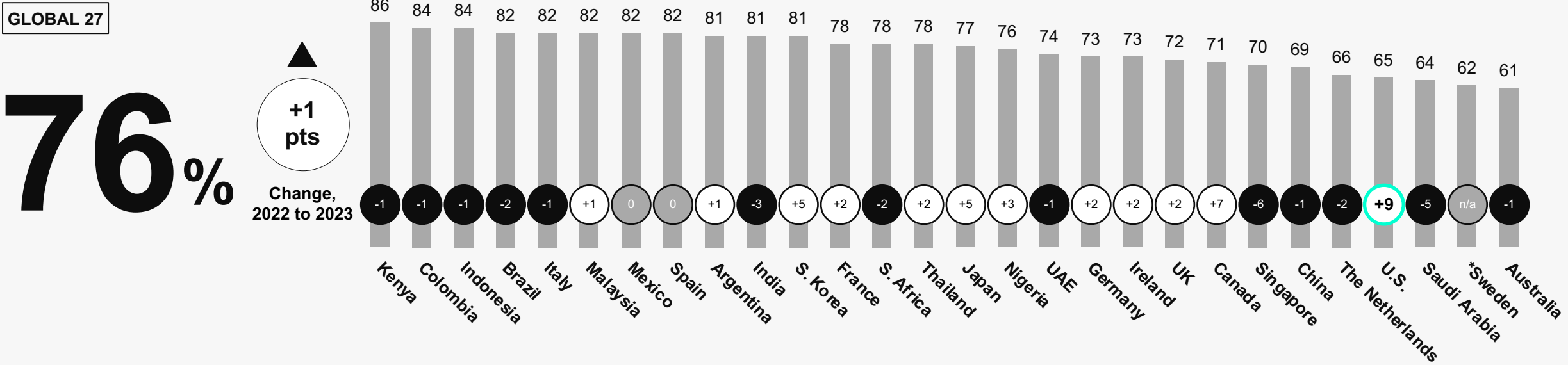


Most Concerned About Climate Change

Percent who worry

Legend: - 0 + Significant change

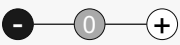
Climate change leading to drought, rising sea levels and other natural disasters



2023 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? 9-point scale; top 4 box, worry. Attribute asked of half of the sample. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Nearly 3 in 4 say Food and Beverage Are Competent

Percent who say

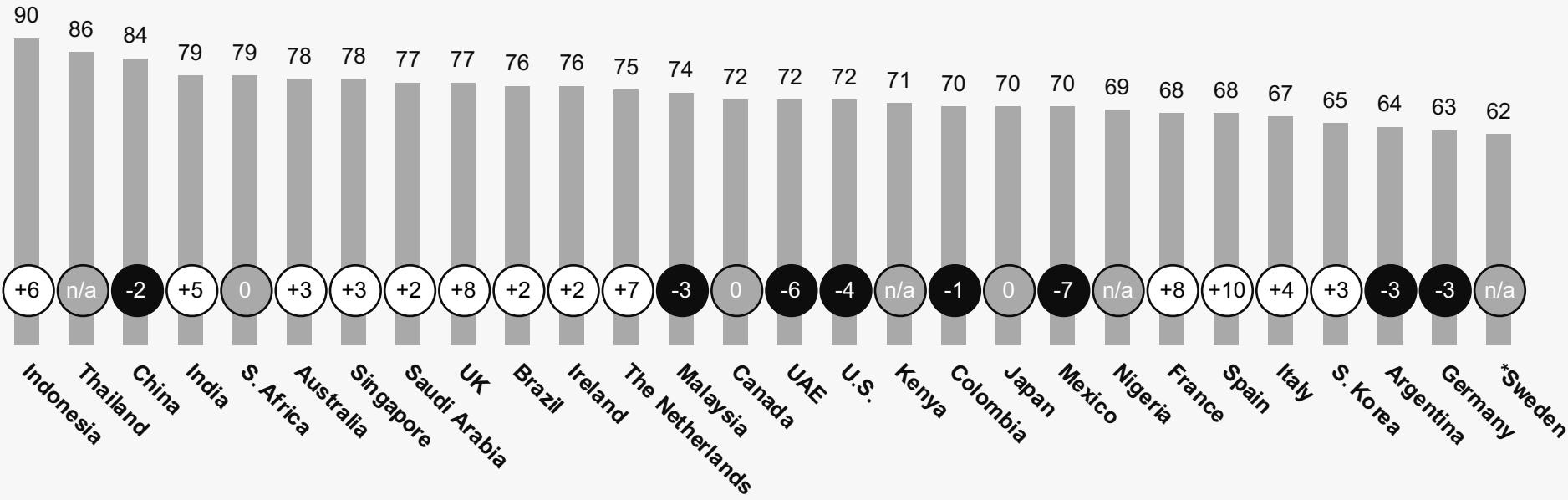


Food and beverage companies in general are good at what they do

GLOBAL 24

74%

+2 pts
Change, 2019 to 2023

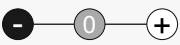


2023 Edelman Trust Barometer. TRU_3D_FBV. To what extent do you agree with the following statements in regards to food and beverage companies? 7-point scale; top 3 box, agree. Question shown to one-fifth of the sample. General population, 24-mkt avg. *Sweden is not included in the global average.



Nearly 2 in 3 say Food and Beverage Companies Try To Have a Positive Impact

Percent who say

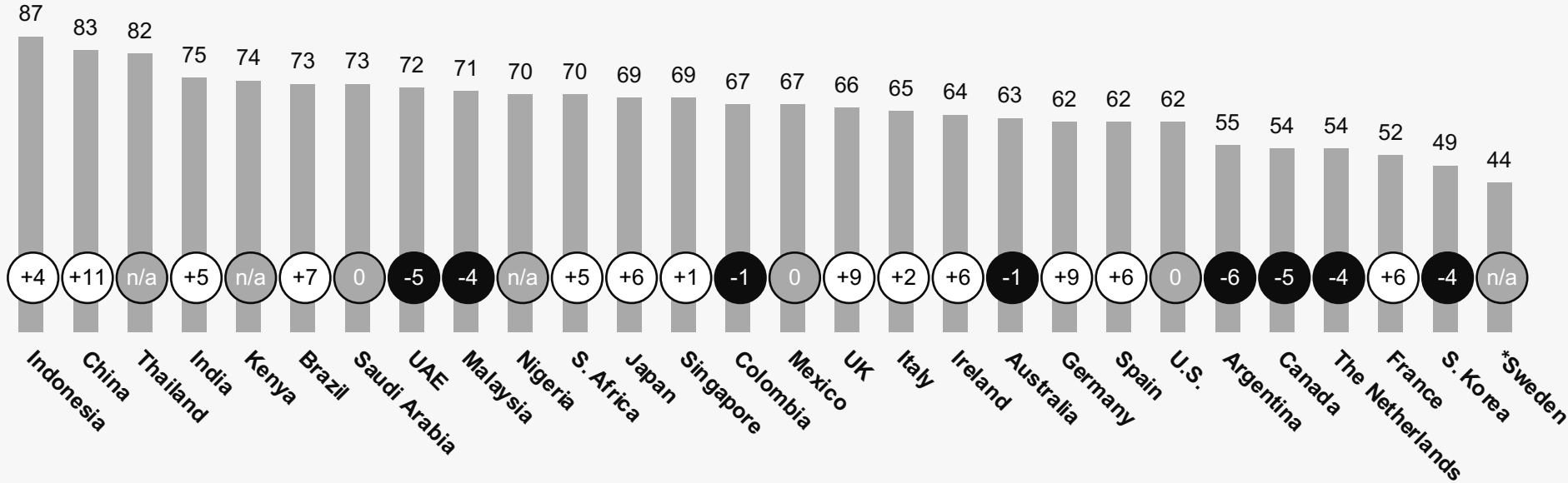


Food and beverage companies in general are **trying hard** to have a positive impact on society

GLOBAL 24

66%

+2 pts
Change, 2019 to 2023

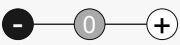


2023 Edelman Trust Barometer. TRU_3D_FBV. To what extent do you agree with the following statements in regards to food and beverage companies? 7-point scale; top 3 box, agree. Question shown to one-fifth of the sample. General population, 24-mkt avg. *Sweden is not included in the global average.



Nearly 2 in 3 say Food and Beverage Companies Keep Their Promises

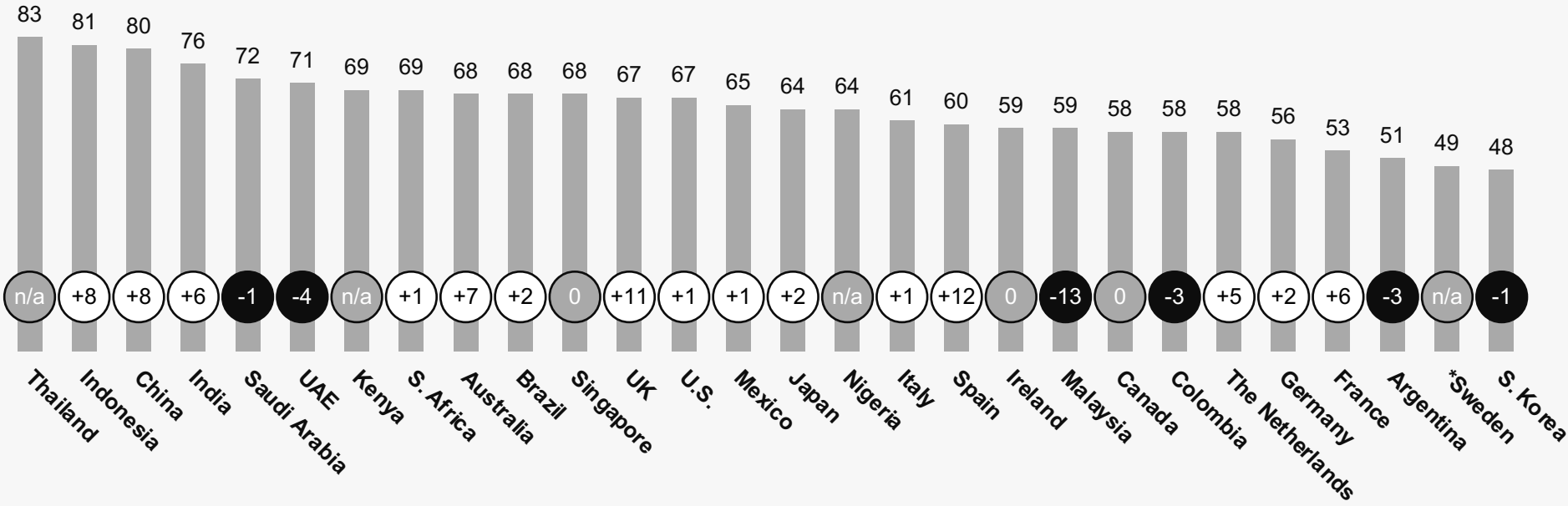
Percent who say



Food and beverage companies in general **keep their promises**

GLOBAL 24

64%

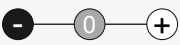


2023 Edelman Trust Barometer. TRU_3D_FBV. To what extent do you agree with the following statements in regards to food and beverage companies? 7-point scale; top 3 box, agree. Question shown to one-fifth of the sample. General population, 24-mkt avg. *Sweden is not included in the global average.



Nearly 2 in 3 say Food and Beverage Companies Are Honest

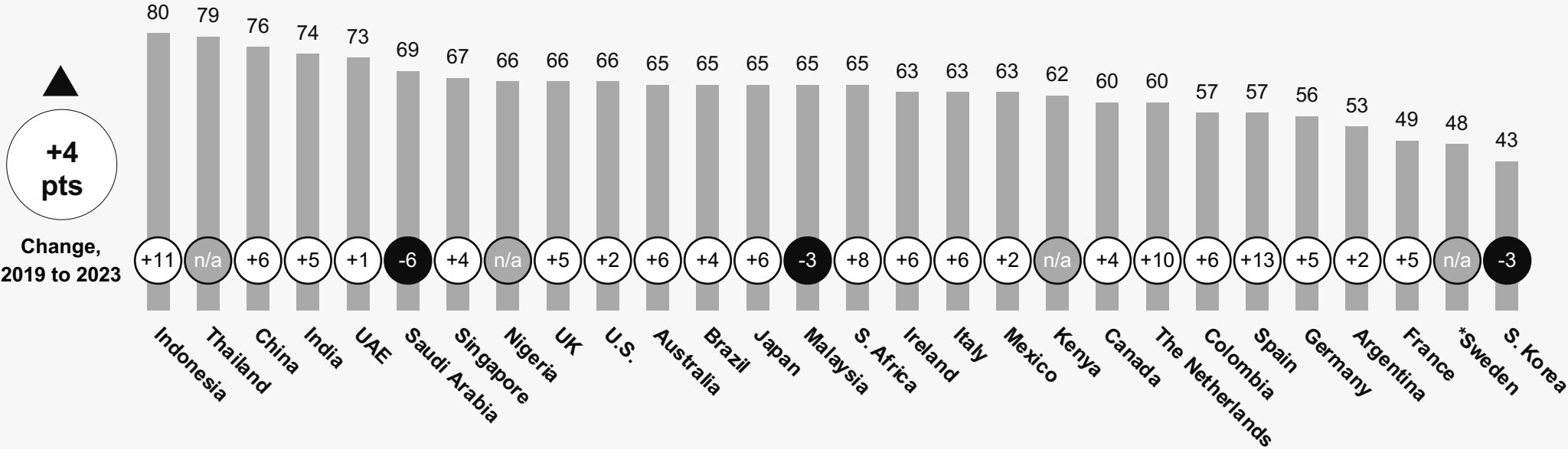
Percent who say



Food and beverage companies in general are honest

GLOBAL 24

63%



2023 Edelman Trust Barometer. TRU_3D_FBV. To what extent do you agree with the following statements in regards to food and beverage companies? 7-point scale; top 3 box, agree. Question shown to one-fifth of the sample. General population, 24-mkt avg. *Sweden is not included in the global average.

