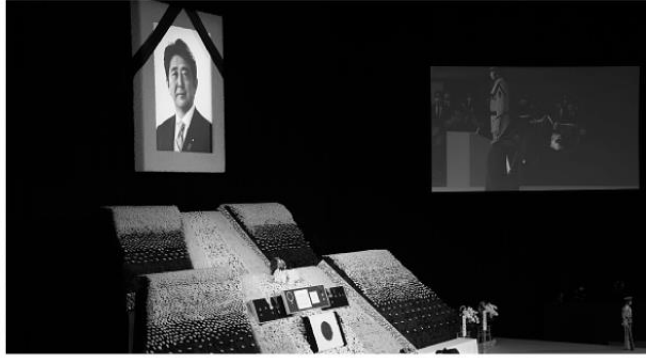
2023 Edelman Trust Barometer

APAC Regional Report



Edelman

2023 Edelman Trust Barometer

Methodology

Annual online survey in its 23rd year

Fieldwork conducted: Nov 1 – Nov 28, 2022

28
Countries

32,000+
Respondents

1,150+/-
Respondents per country**

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

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

- 0 +

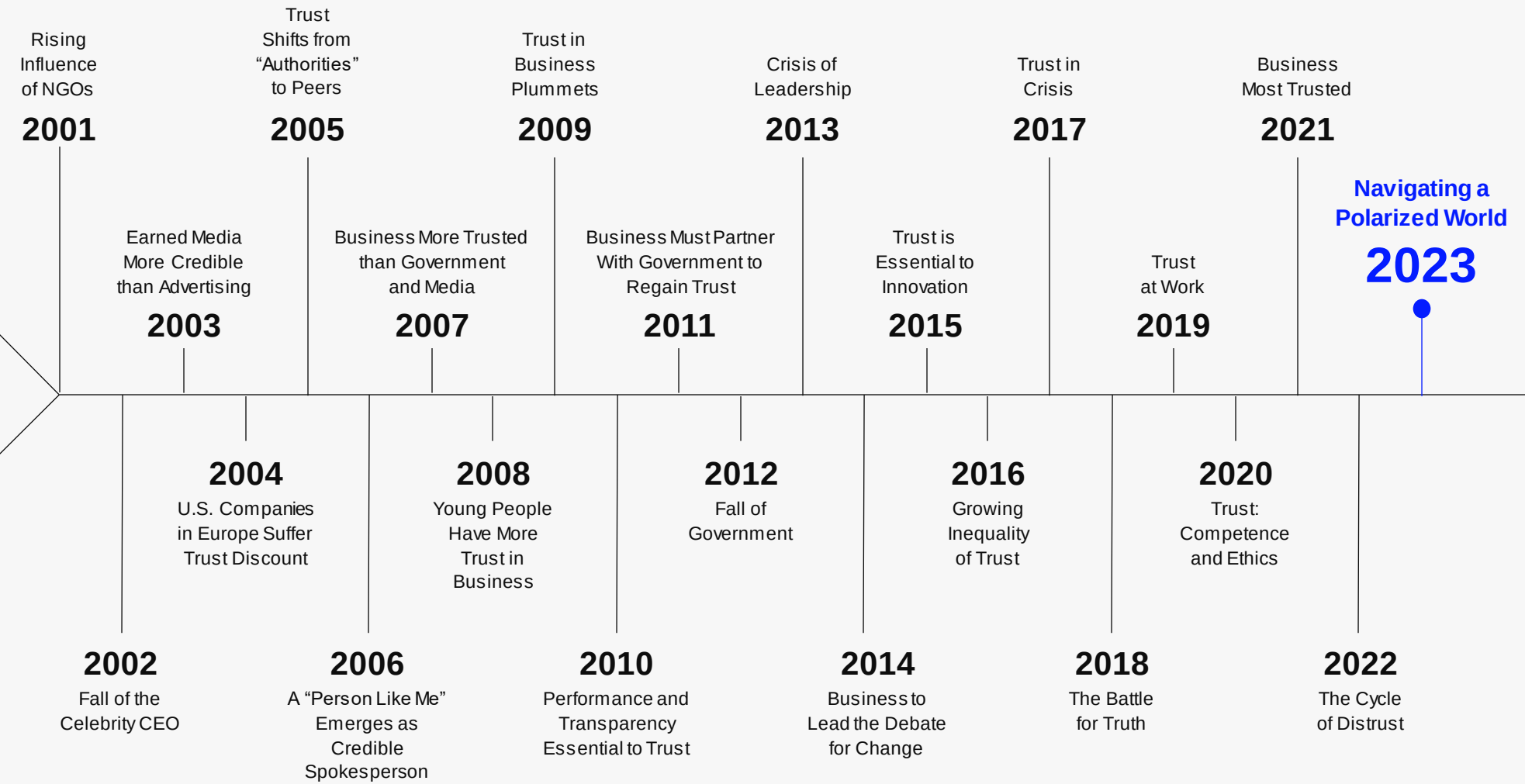
Significant change

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

Due to a translation inconsistency, the France data measuring trust in government, as well as competence and ethics was removed from certain slides. For more details contact the Trust Barometer research team

23 Years of Trust



Four Forces That Lead To Polarization

Economic Anxieties

Economic optimism is collapsing around the world, with 24 of 28 countries seeing all-time lows in the number of people who think their families will be better off in five years.

Institutional Imbalance

Business is now the sole institution seen as competent and ethical; and is under pressure to step into the void left by other institutions.

Mass-Class Divide

People in the top quartile of income live in a different trust reality than those in the bottom quartile, with 20+ point gaps in Thailand, the United States, and Saudi Arabia.

The Battle for Truth

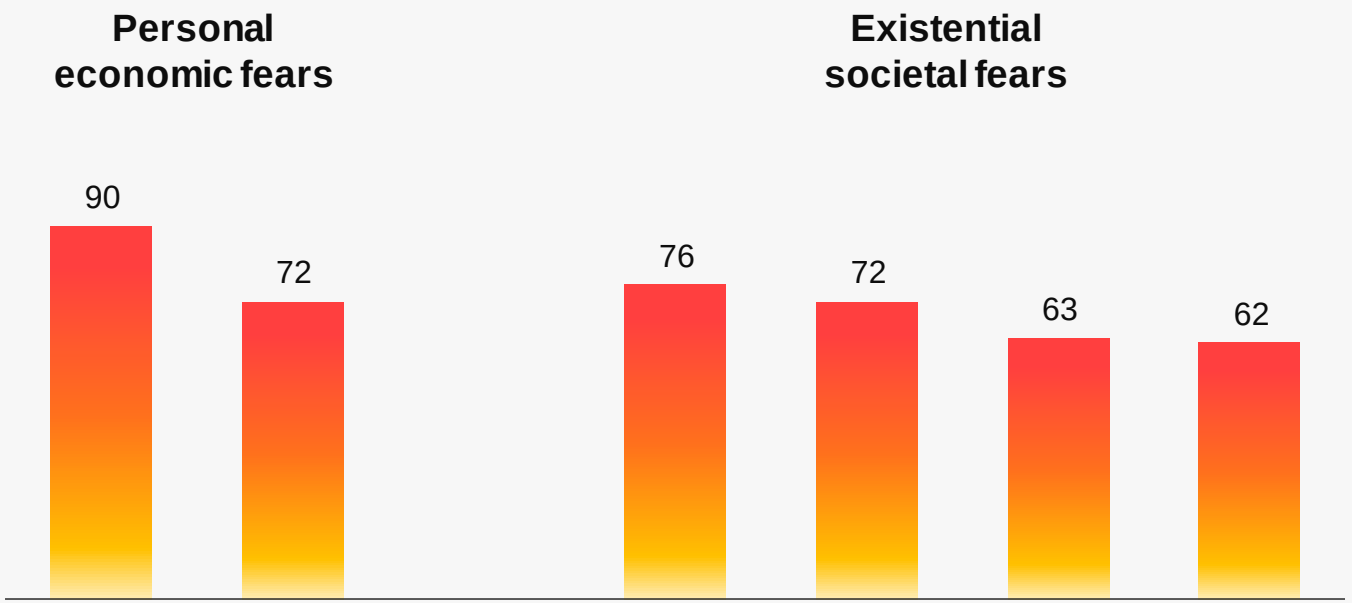
A shared media environment has given way to echo chambers, making it harder to collaboratively solve problems. Media is not trusted, with especially low trust in social media.

Facing Economic Fears Without a Trust Safety Net

Personal Anxieties On Par With Existential Fears

Percent who worry about…

APAC



	Job loss (net)	Inflation	Climate change	Nuclear war	Energy shortages	Food shortages
Australia	83	69	61	68	59	54
China	85	66	69	63	58	58
India	92	68	81	72	64	69
Indonesia	93	73	84	77	62	77
Japan	82	75	77	74	80	50
Malaysia	96	81	82	79	59	74
Singapore	90	71	70	68	52	57
S. Korea	91	72	81	71	65	49
Thailand	94	76	78	75	65	71

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, APAC region. Job loss asked of those who are an employee of an organization (Q43/1). Job loss is a net of attributes 1-3, 5, and 22-24.

Economic Optimism Collapses

Percent who say

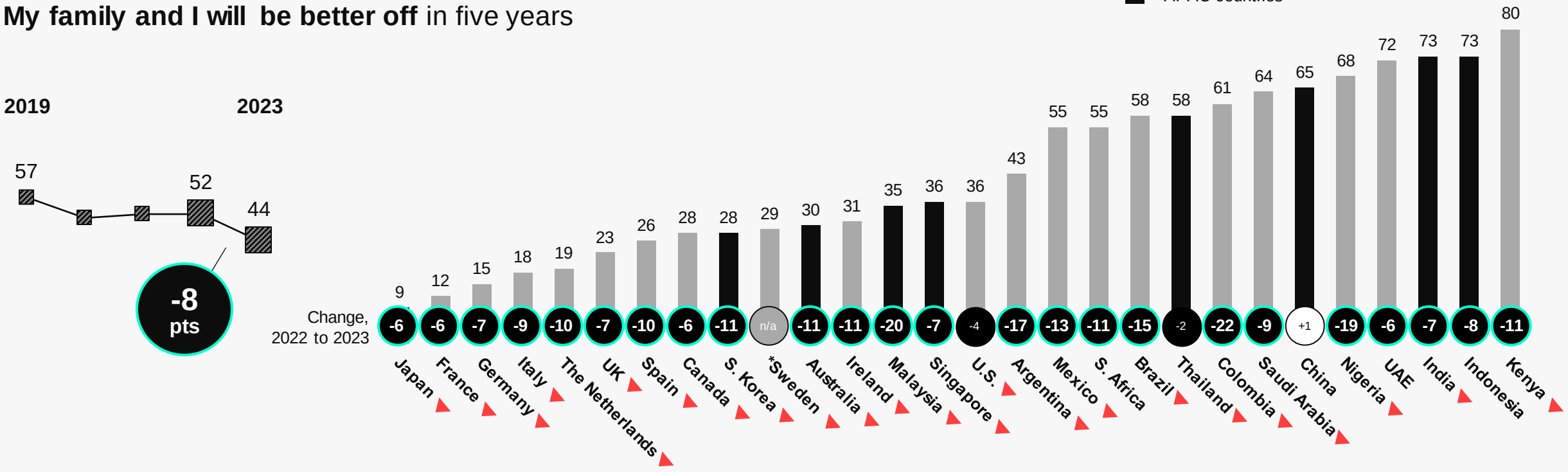
APAC

Significant change

24 of 28 countries at all-time lows

APAC countries

My family and I will be better off in five years



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, APAC region and by market. *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.

Business Most Trusted

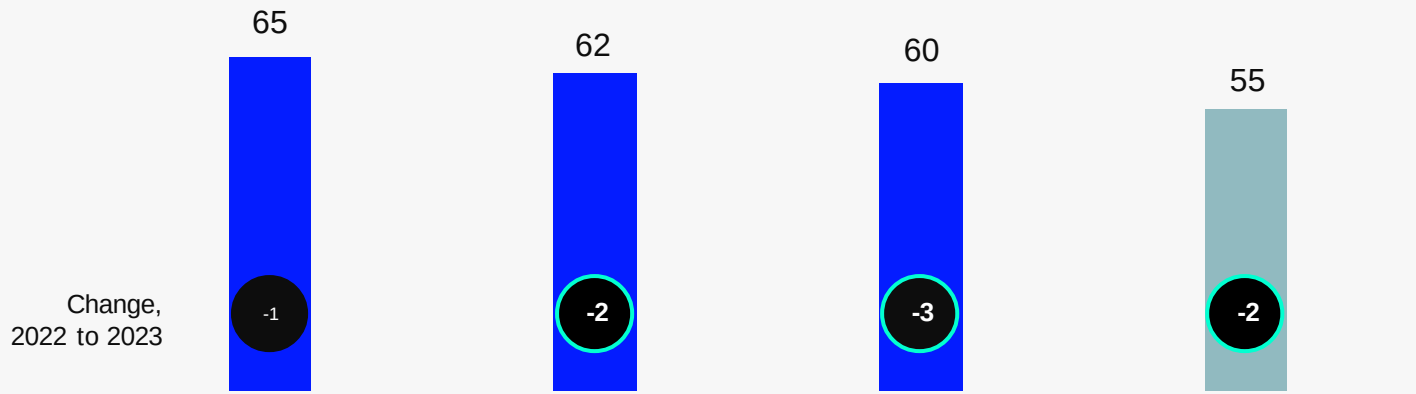
Percent trust, in APAC

APAC

Distrust (1-49) Neutral (50-59) Trust (60-100)

- 0 +

Significant change



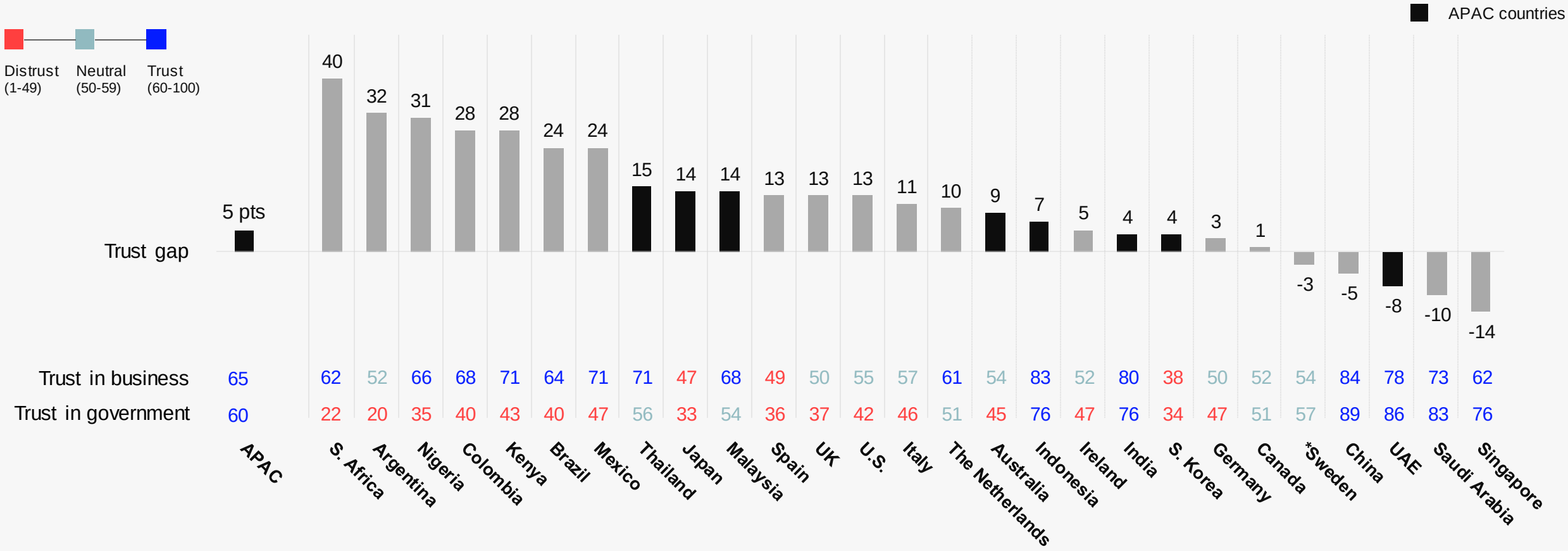
	Business	NGOs	Government	Media
Australia	54	53	45	38
China	84	78	89	79
India	80	74	76	62
Indonesia	83	69	76	72
Japan	47	38	33	34
Malaysia	68	69	54	55
Singapore	62	65	76	59
S. Korea	38	46	34	27
Thailand	71	68	56	67

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. General population, APAC region. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Note: in S. Korea, the term used for Media means "News media".

Institutions Out of Balance: Government Less Trusted than Business

Percent trust, and the percentage-point difference between trust in business vs government



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. General population, 26-mkt avg and APAC region and by market. *Sweden is not included in the global average.
Due to a translation inconsistency, the France data was removed from this slide. For more details, refer to the Technical Appendix or contact the Trust Barometer research team.

Business and NGOs Less Likely To Be Seen As Sources of False Information

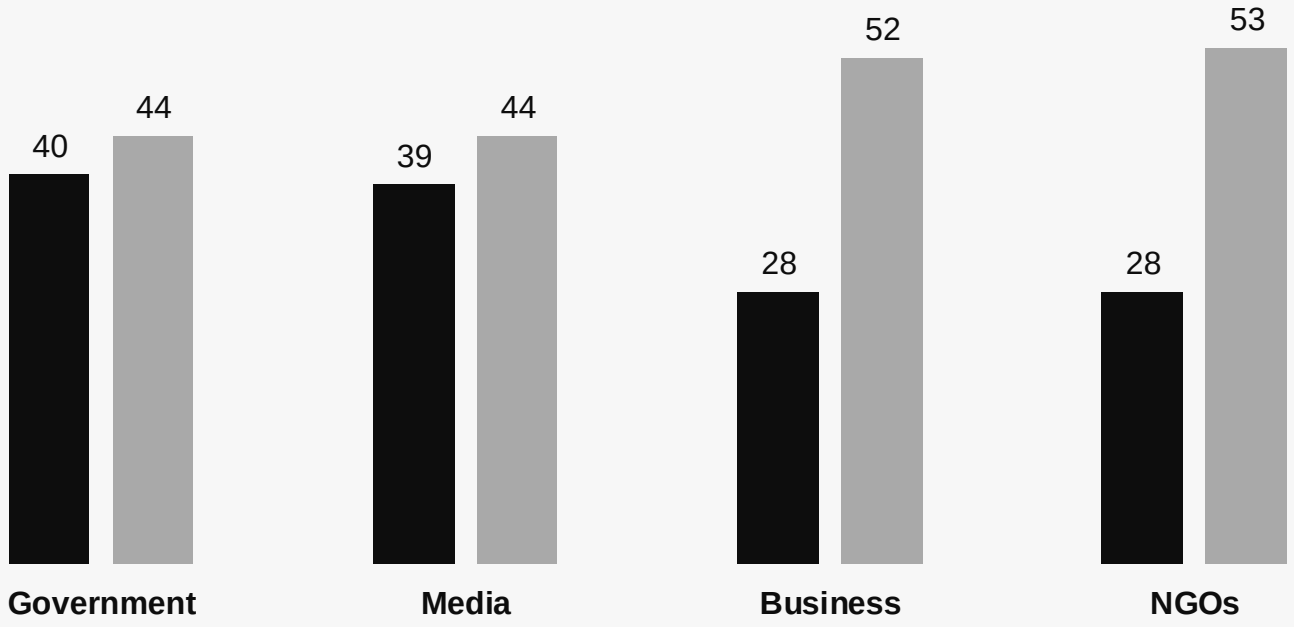
Percent who say, in APAC

APAC Excludes China and Thailand

These institutions are

a source of **false or misleading** information

a reliable source of **trustworthy** information

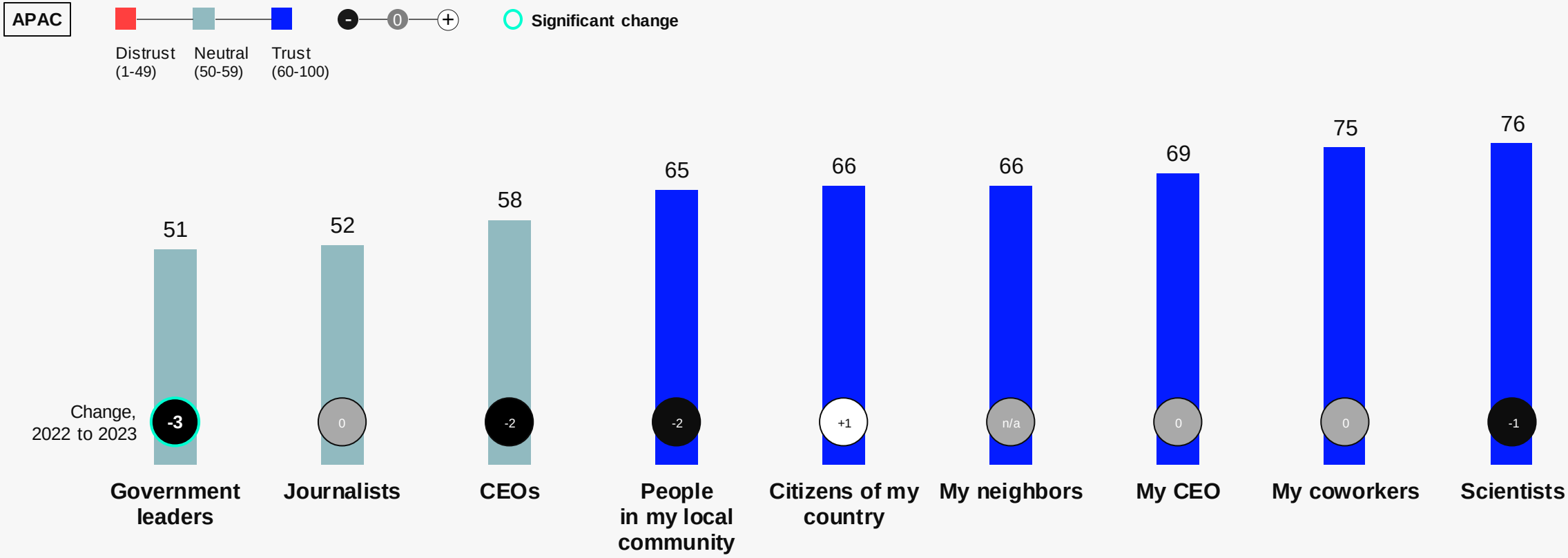


2023 Edelman Trust Barometer. [INS]_PER_DIM. In thinking about why you do or do not trust [institution], please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive; bottom 5 box, negative. Media and NGOs shown to half of the sample. General population, APAC region. Data not collected in China and Thailand.

Note: in S. Korea, the term used for Media means "News media".

Institutional Leaders Least Trusted

Percent trust, in APAC



2023 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. Some attributes asked of half of the sample. General population, APAC region. "My coworkers" and "my CEO" only shown to those who are an employee of an organization (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Mass-Class Divide: Income-Based Inequality Creates Two Trust Realities

Trust Index

(average percent trust in NGOs, business, government, and media)

Distrust (1-49) | Neutral (50-59) | Trust (60-100)

2023 High income (top 25%)

64	**Global 26**
90	China
85	Thailand
84	Saudi Arabia
82	Indonesia
82	UAE
76	India
73	Singapore
70	Kenya
66	Malaysia
64	Mexico
63	U.S.
62	Nigeria
62	The Netherlands
60	Germany
60	Ireland
59	Italy
56	Brazil
54	Australia
54	Colombia
53	Canada
52	S. Africa
52	*Sweden
51	UK
49	Spain
48	Japan
47	Argentina
44	S. Korea

2023 Low income (bottom 25%)

49	**Global 26**
71	China
70	India
68	Indonesia
64	Saudi Arabia
63	Kenya
63	UAE
56	Mexico
56	Nigeria
55	Malaysia
55	Singapore
48	Brazil
48	Thailand
47	Canada
46	Italy
46	The Netherlands
44	Colombia
43	Australia
42	Germany
42	Ireland
41	S. Africa
41	*Sweden
40	Spain
40	U.S.
37	Argentina
35	UK
29	Japan
29	S. Korea

15pts trust inequality globally; double-digits in 20 of 27 countries

Greatest income-based trust inequality in:

Thailand	37pts
U.S.	23pts
Saudi Arabia	20pts
China	19pts
Japan	19pts
UAE	19pts

2023 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, 26-mkt avg., by income. *Sweden is not included in the global average. Due to a translation inconsistency, the France data was removed from this slide. For more details contact the Trust Barometer research team.

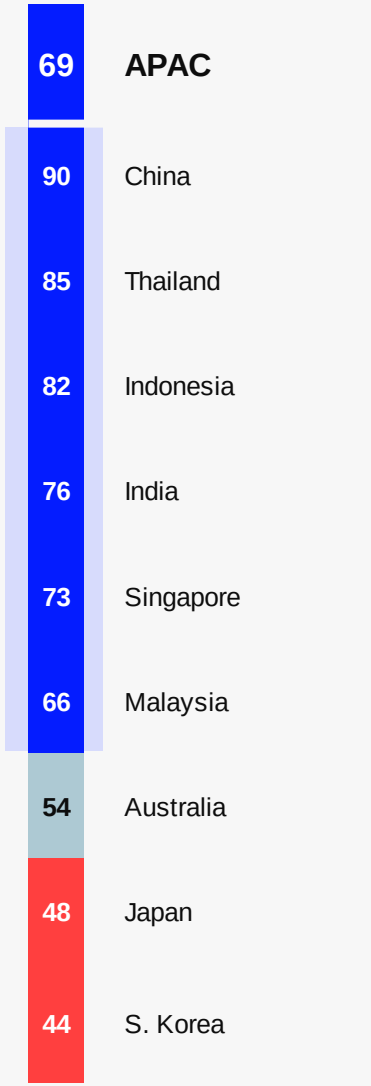
Income quartiles were determined separately for each country based on the distribution of household incomes among respondents from that country.

Mass-Class Divide in APAC: Income-Based Inequality Creates Two Trust Realities

Trust Index

(average percent trust in NGOs, business, government, and media)

Distrust (1-49) Neutral (50-59) Trust (60-100)



16pts trust inequality APAC; double-digits in 8 of 9 countries

Greatest income-based trust inequality in:

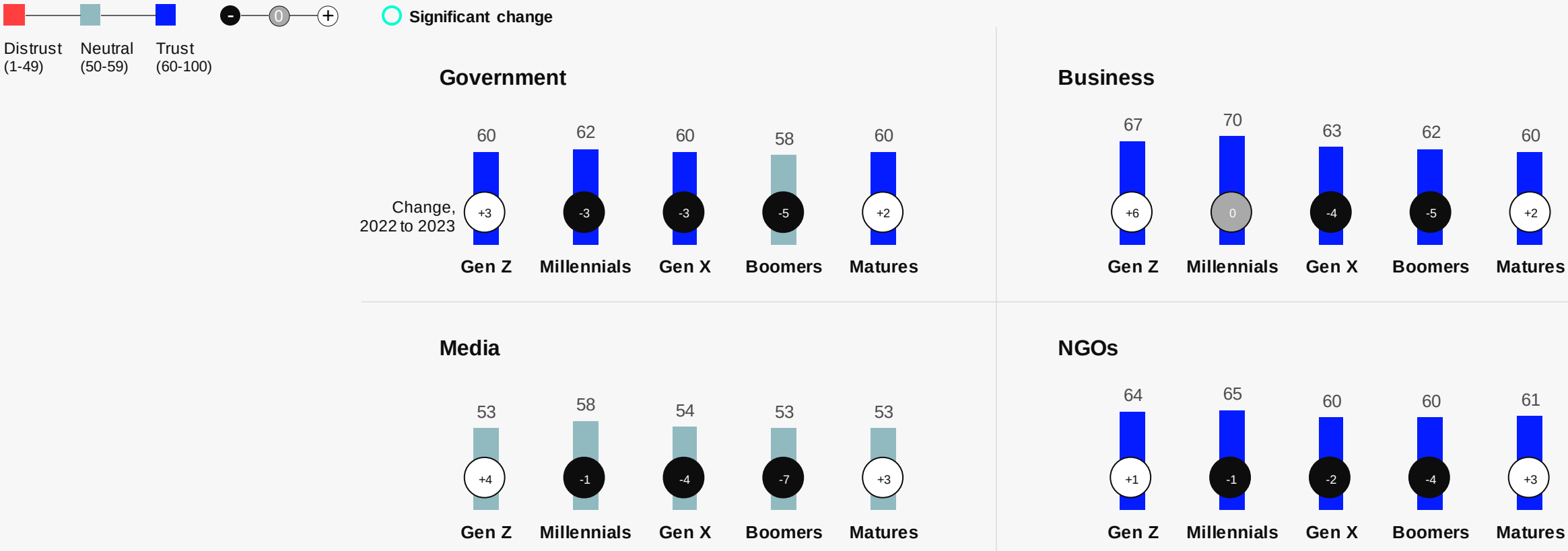
Thailand	37pts
China	19pts
Japan	19pts

2023 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, APAC region., by income. *Sweden is not included in the global average.

Income quartiles were determined separately for each country based on the distribution of household incomes among respondents from that country.

Only Media Not Trusted by Any Generation

Percent trust, in APAC, by generation

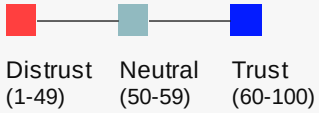


2023 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, APAC, by generation. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

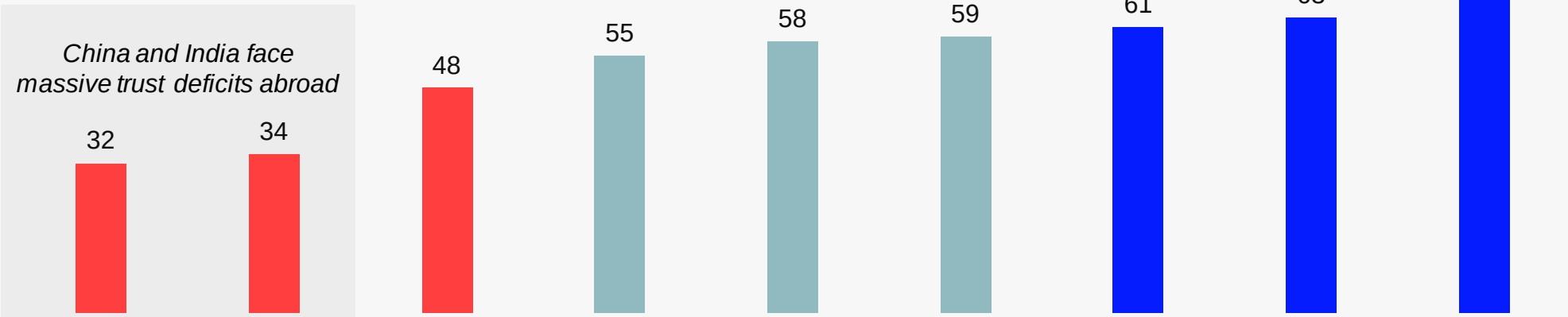
Trust at Home Does Not Guarantee Trust Abroad

Percent trust in companies headquartered in each country

GLOBAL 26



China and India face massive trust deficits abroad

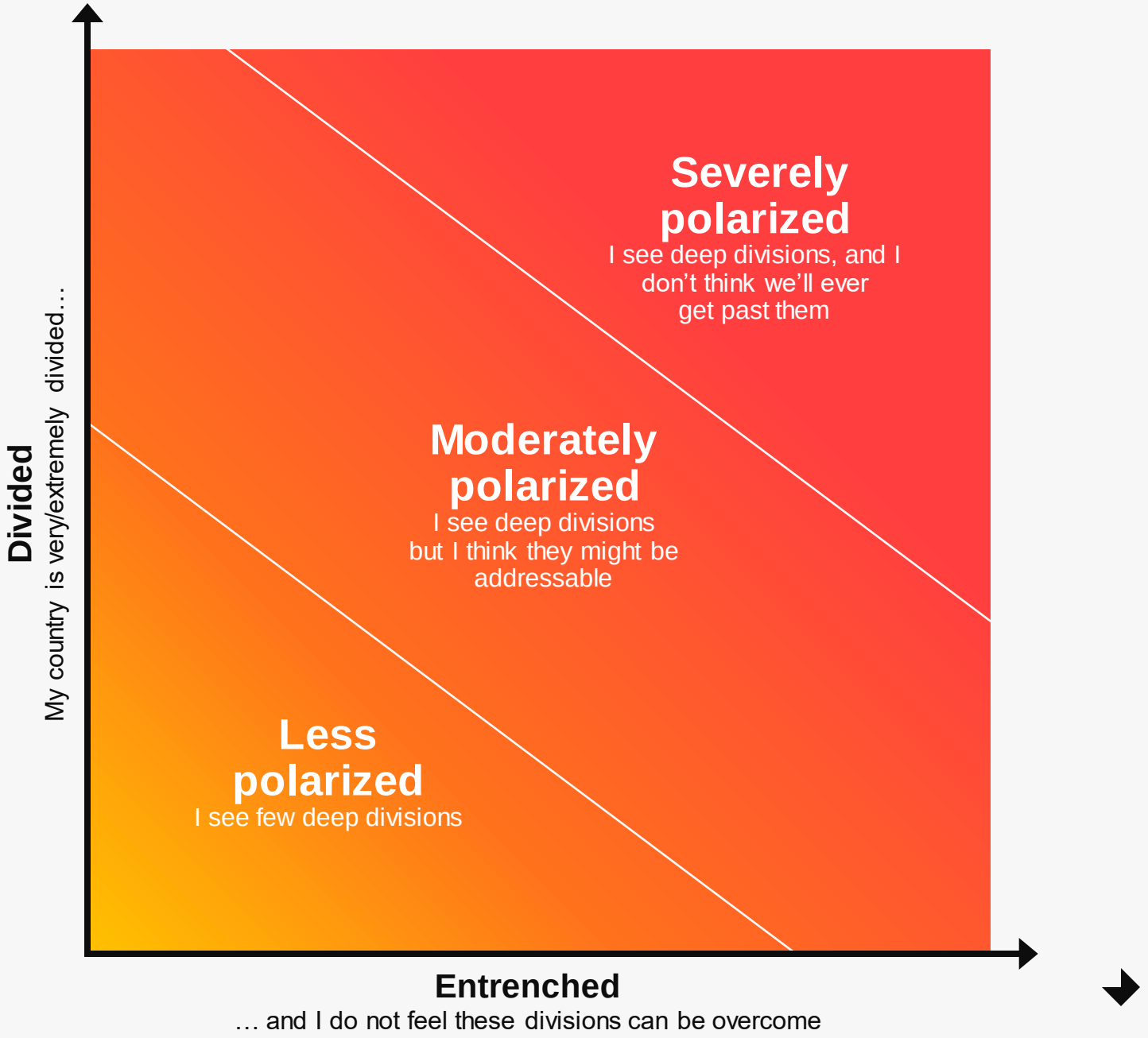


	China	India	S. Korea	U.S.	France	UK	Japan	Germany	Canada
Foreign trust in companies headquartered in each market									
Domestic trust in companies headquartered in each market	90	89	55	65	59	62	54	62	74
Trust gap, foreign vs domestic	**-58**	**-55**	**-7**	**-10**	**-1**	**-3**	**7**	**1**	**-7**

2023 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 26-mkt avg., excluding country being rated for "foreign trust", and by market for "domestic trust".

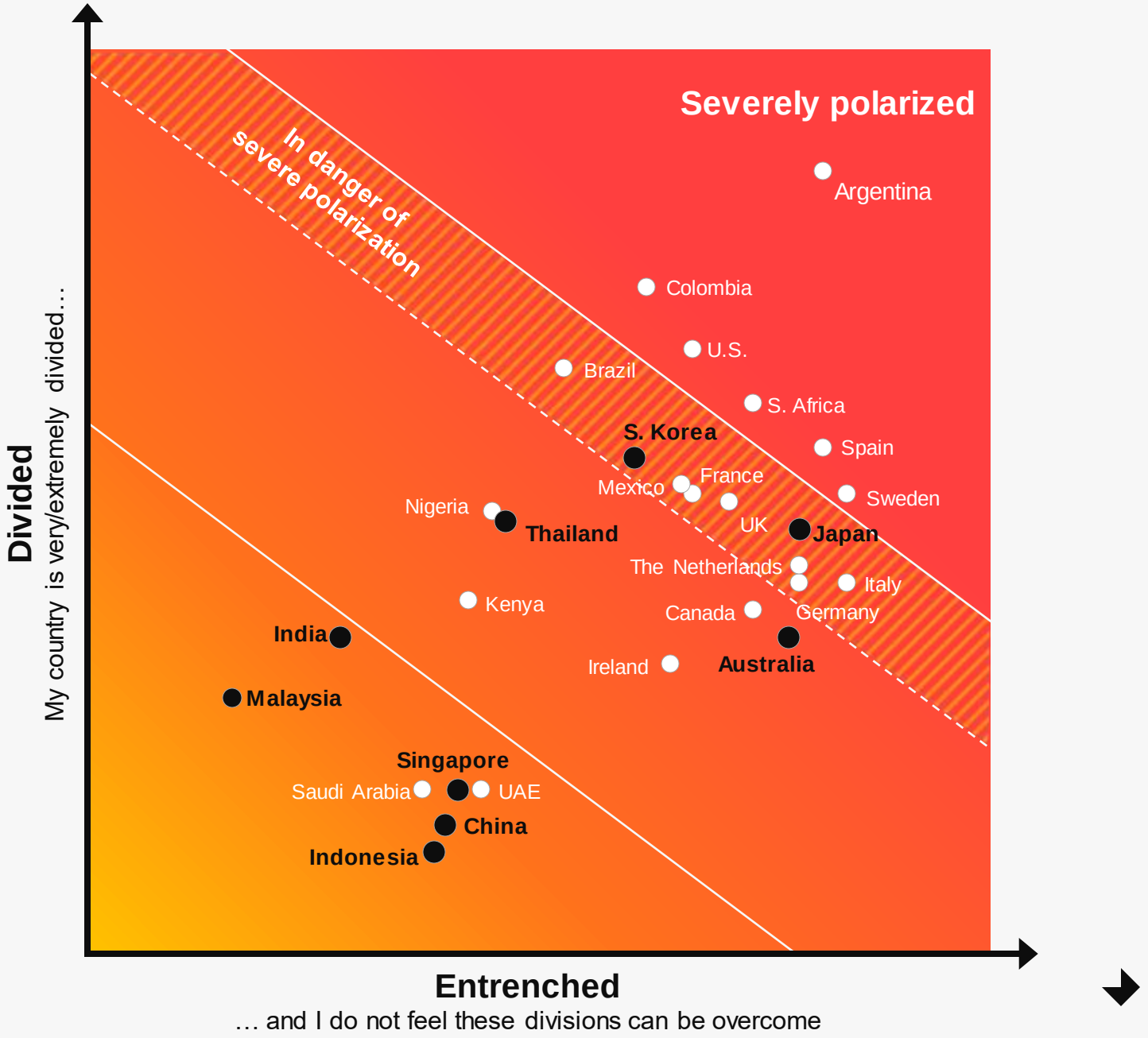
Distrust Breeds Polarization

Polarization Most Severe When Deep Divisions Become Entrenched



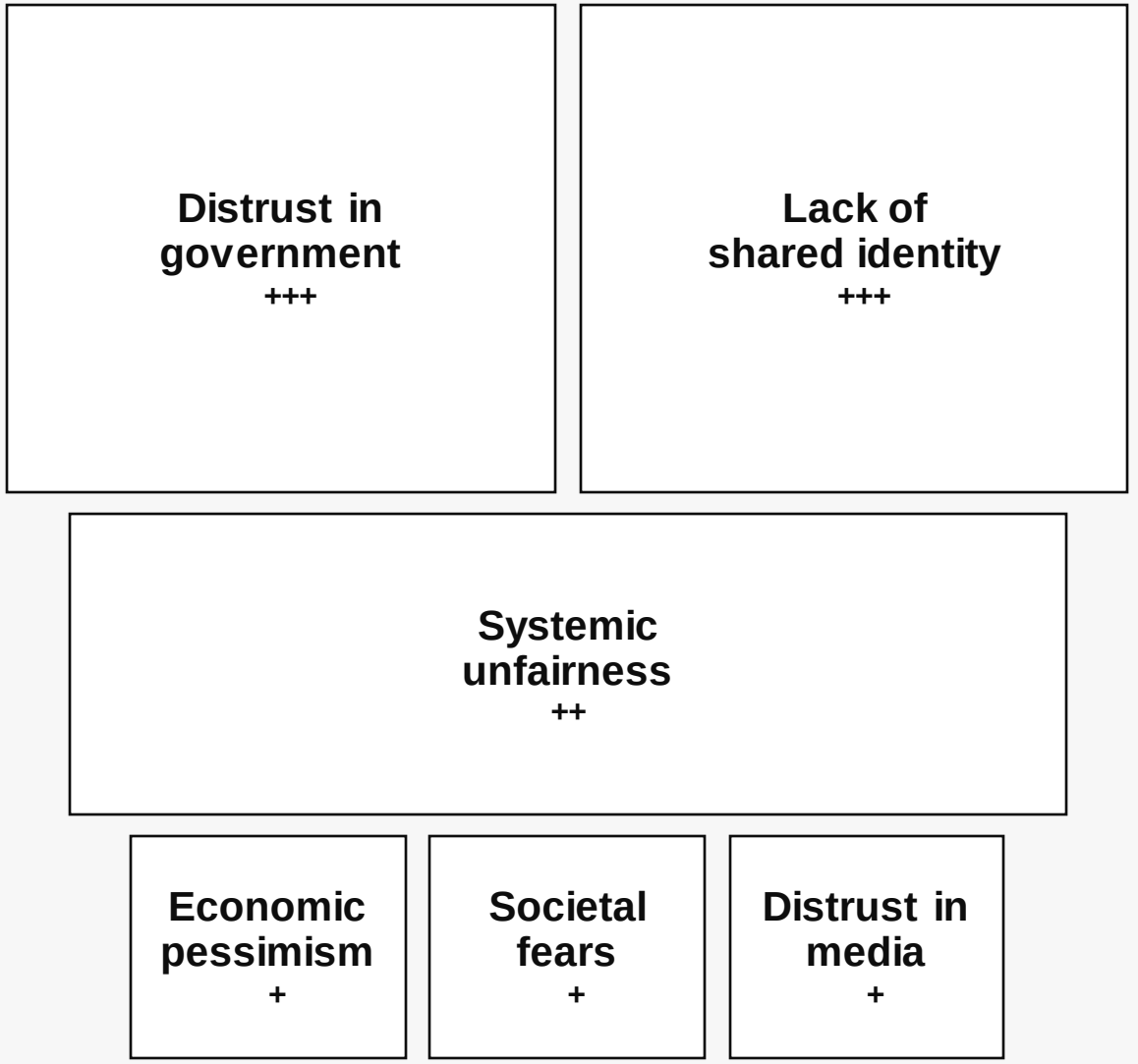
Six Countries Severely Polarized

APAC countries



2023 Edelman Trust Barometer. POL_DEG. Using the scale below, please indicate how divided on key societal issues you believe your country is today. 5-point scale; top 2 box, very/extremely divided. POL_PROG. How likely or unlikely do you think it is that your country will be able to work through or overcome its ideological divisions and lack of agreement on key issues and challenges? 8-point scale; codes 2-5, divisions can't be overcome. General population, by market. Data for "entrenched" is POL_PROG/2-5 filtered by those who feel their country is very/extremely divided (POL_DEG/4-5). All data is rebased to exclude those that said, "don't know."

Drivers Of Polarization: Distrust, Weak Social Fabric, Unfairness



Size of impact on respondent's perception of polarization

+ Less than .20 **++** .20 to .30 **+++** More than .30

Only significant drivers of polarization are shown

2023 Edelman Trust Barometer. Regression analysis conducted on several questions. For a full explanation of how this data was calculated, please see the Technical Appendix.

Both Cause and Consequence: Polarization Itself Leads to Further Distrust

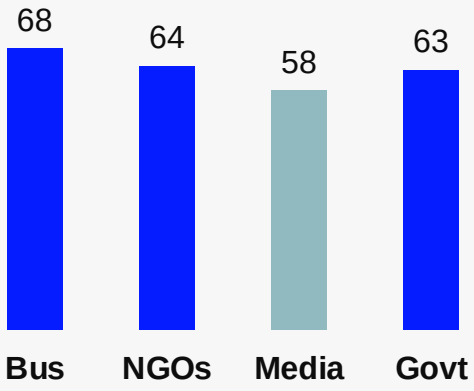
Percent trust among those who say

GLOBAL 26 excludes France

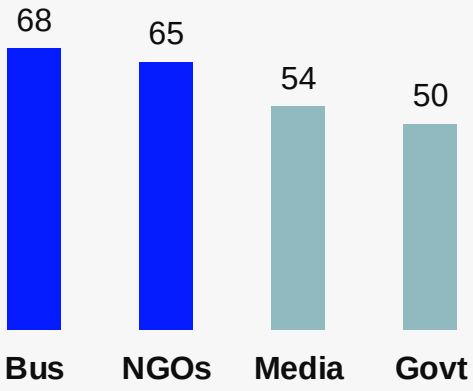
Distrust (1-49) Neutral (50-59) Trust (60-100)

My country is…

…not very divided

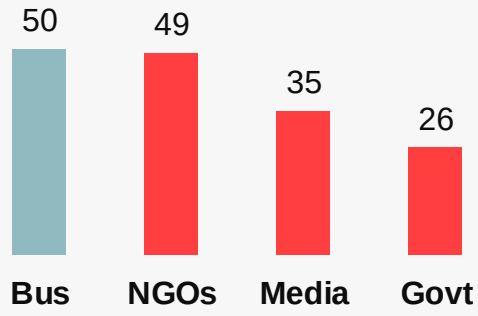


…divided, not entrenched



…polarized: divisions are entrenched

When we see our country as polarized, we don't trust



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. General population, 26-mkt avg., by perceived level of division. For more information on how these segments are defined, please refer to the Technical Appendix.

Due to a translation inconsistency, the France data was removed from the global data. For more details contact the Trust Barometer research team.

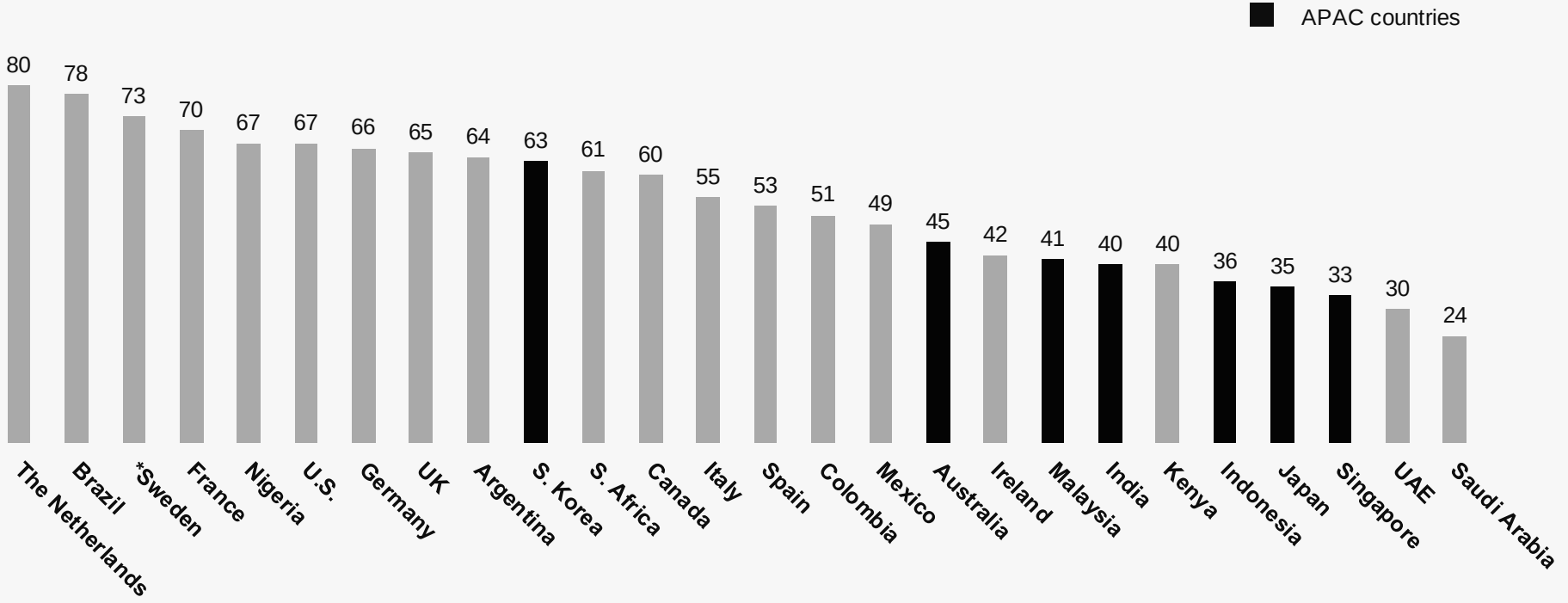
More Divided Today Than in the Past

Percent who say

Our country is **more divided today** than in the past

APAC Excludes China and Thailand

42%



2023 Edelman Trust Barometer. NAT_POL. Which of the following is the most accurate description of the situation in your country today? General population, APAC region and by market. Data not collected in China and Thailand. *Sweden is not included in the global average.

Divisive Forces Exploit and Intensify Our Differences

Percent who say, in APAC

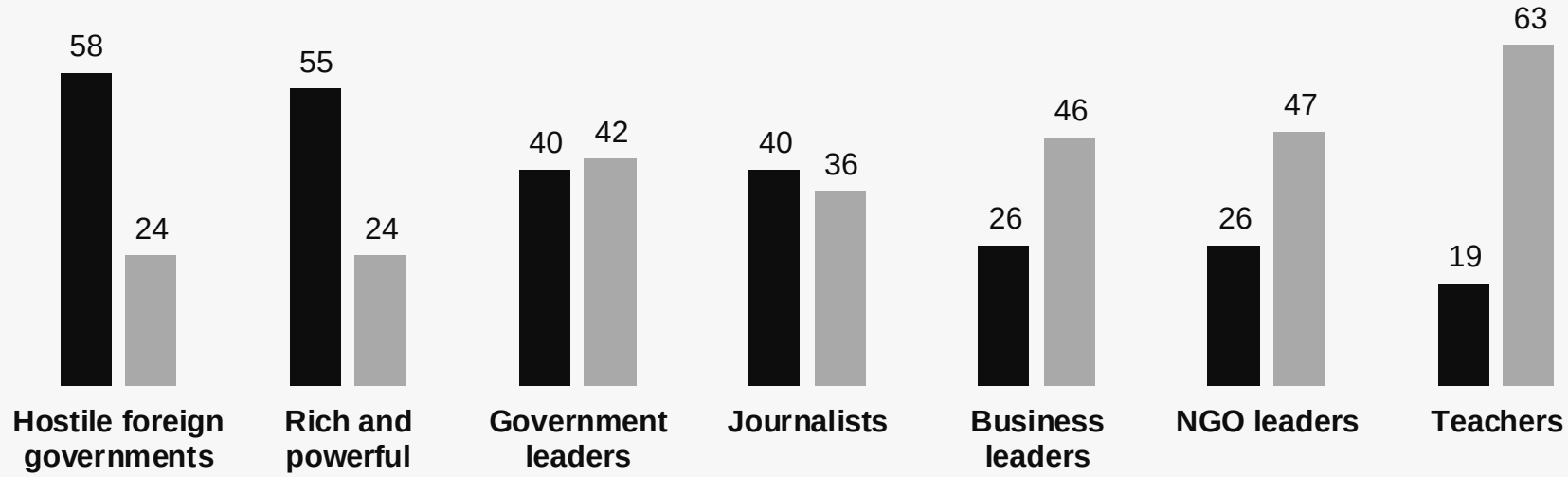
APAC Excludes China and Thailand

These groups are

a dividing force
that pulls people apart

a unifying force
that brings people together

Government leaders, business leaders, NGO leaders, and teachers more likely to be seen as unifiers

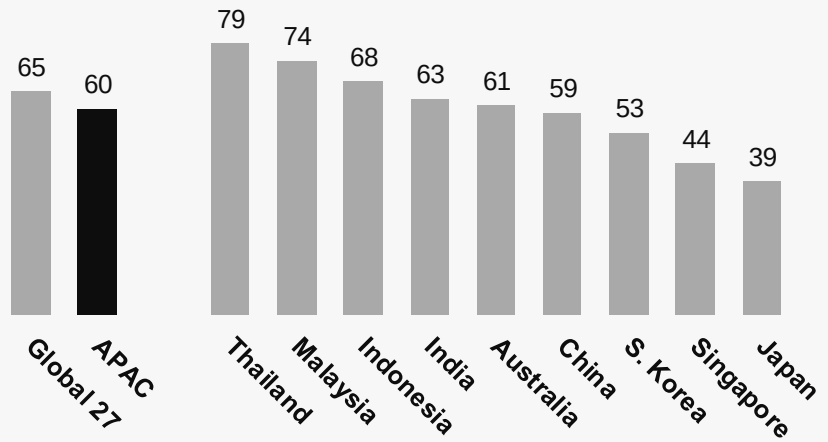


2023 Edelman Trust Barometer. PROB_PLP. Ideological differences will always exist among people, but there are some groups of people that are perhaps making things worse than they might otherwise be by fueling divisions and fomenting a lack of civility between people who hold different views. In contrast, there are some groups of people that are perhaps making things better than they might otherwise be by working to foster cooperation between people who hold different views. In thinking about each group of people listed below, please specify where you think they fall on the scale between being a unifying force in society and being a dividing force. 11-point scale; codes 7-11, a dividing force in society; codes 1-5, a unifying force in society. Some attributes asked of half of the sample. General population, APAC region. "Journalists" and "Government leaders" not asked in China and Thailand.

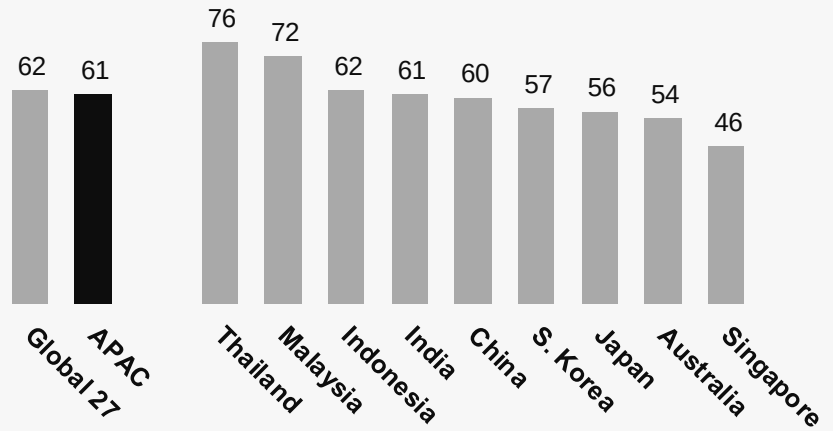
Social Fabric Weakens

Percent who say, in APAC

The lack of civility and mutual respect today is the **worst I have ever seen**



The social fabric that once held this country together has **grown too weak** to serve as a foundation **for unity and common purpose**



2023 Edelman Trust Barometer. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". 9-point scale; top 4 box, true. General population, APAC region.

Ideology Becomes Identity: Few Would Help, Live, or Work With the Other Side

Among those who feel strongly about an issue, percent who say, in APAC

If a person strongly disagreed with me or my point of view, I would …

	APAC	Australia	China	India	Indonesia	Japan	Malaysia	Singapore	S. Korea	Thailand
Help them if they were in need	31	24	32	42	41	21	34	26	23	35
Be willing to live in **the same neighborhood**	19	21	19	26	18	8	16	22	18	23
Be willing to have them **as a coworker**	21	19	20	30	24	7	20	20	16	34

2023 Edelman Trust Barometer. ISS_DIF_CONS. Thinking about the issue you just selected, which of the following describes how you would feel about, or act towards, a person who strongly disagreed with your position or point of view on that issue? Pick all that apply. Question asked among those who feel strongly about an issue (PERS_ISS/1-5). General population, APAC region.

Polarization Worsens Fears

Among those who say their country is divided on key issues, percent who say, in APAC

APAC Excludes China and Thailand

If our divisions are not addressed, this is likely to be a consequence

Top 5 of 13:

#1	Worsening prejudice and discrimination
#2	Slower economic development
#3	Inability to address societal challenges
#4	Loss of our country's influence
#5	Lack of cooperation with authorities

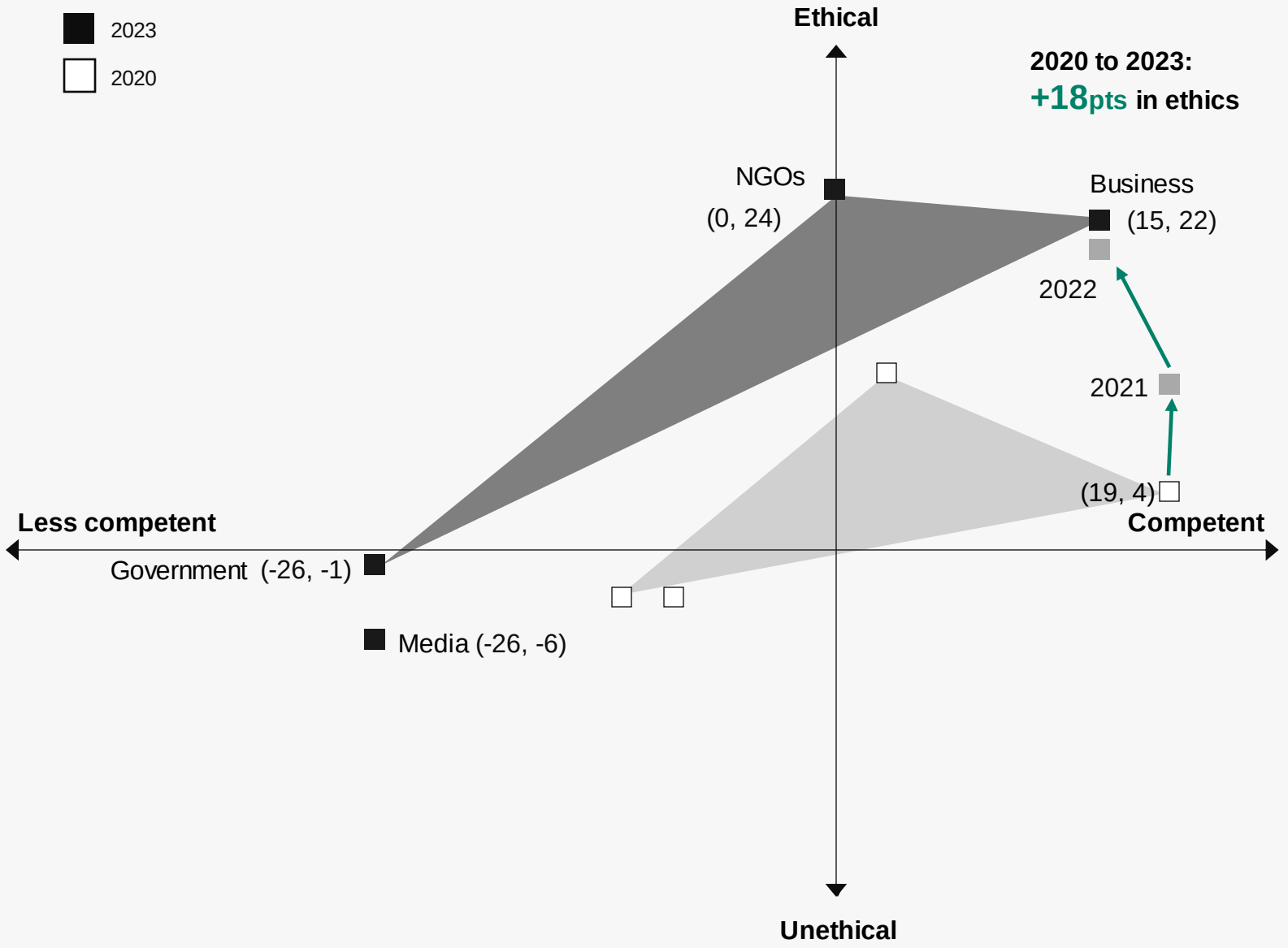
2023 Edelman Trust Barometer. NAT_POL_CONS. What do you see as the likely consequences of these divisions within your country if they are not addressed? Pick all that apply. Question asked among those who say their country is divided on key issues (POL_DEG/2-5). General population, APAC region. Data not collected in China and Thailand. The order shown is based on top 5 rank with ties broken by decimals.

Great Expectations, Heightened Risk for Business

In APAC, NGOs and Business are Competent and Ethical, Business Sustains Rise in Ethics for Third Year

(Competence score, net ethical score)

APAC Excludes China and Thailand



2023 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]_PER_DIM/1-4. Government and Media were only asked of half of the sample. The competence score is a net based on TRU_3D_[INS]/1. Government and Media were only asked of half of the sample. General population, APAC region. Data not collected in China and Thailand. For full details regarding how this data was calculated and plotted, please see the Technical Appendix.

My Employer Trusted Around the World

Percent trust

APAC

Distrust (1-49) Neutral (50-59) Trust (60-100)

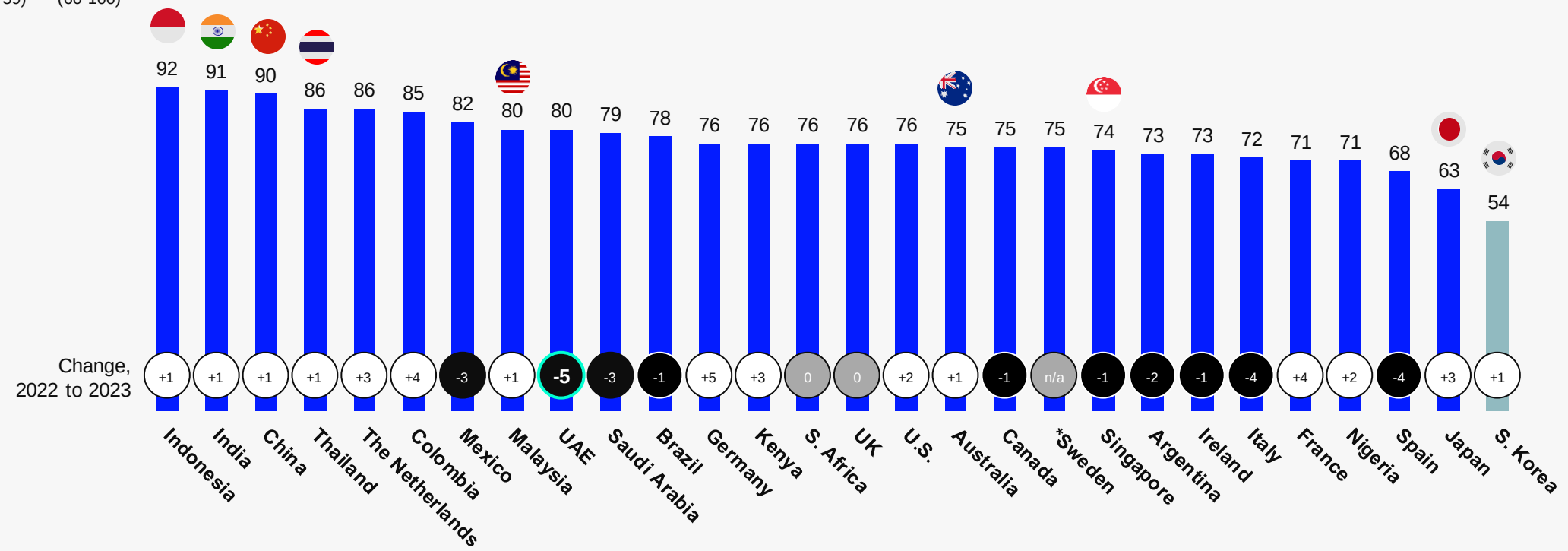
- 0 +

Significant change

79

MY EMPLOYER

Business	65
NGOs	62
Government	60
Media	55



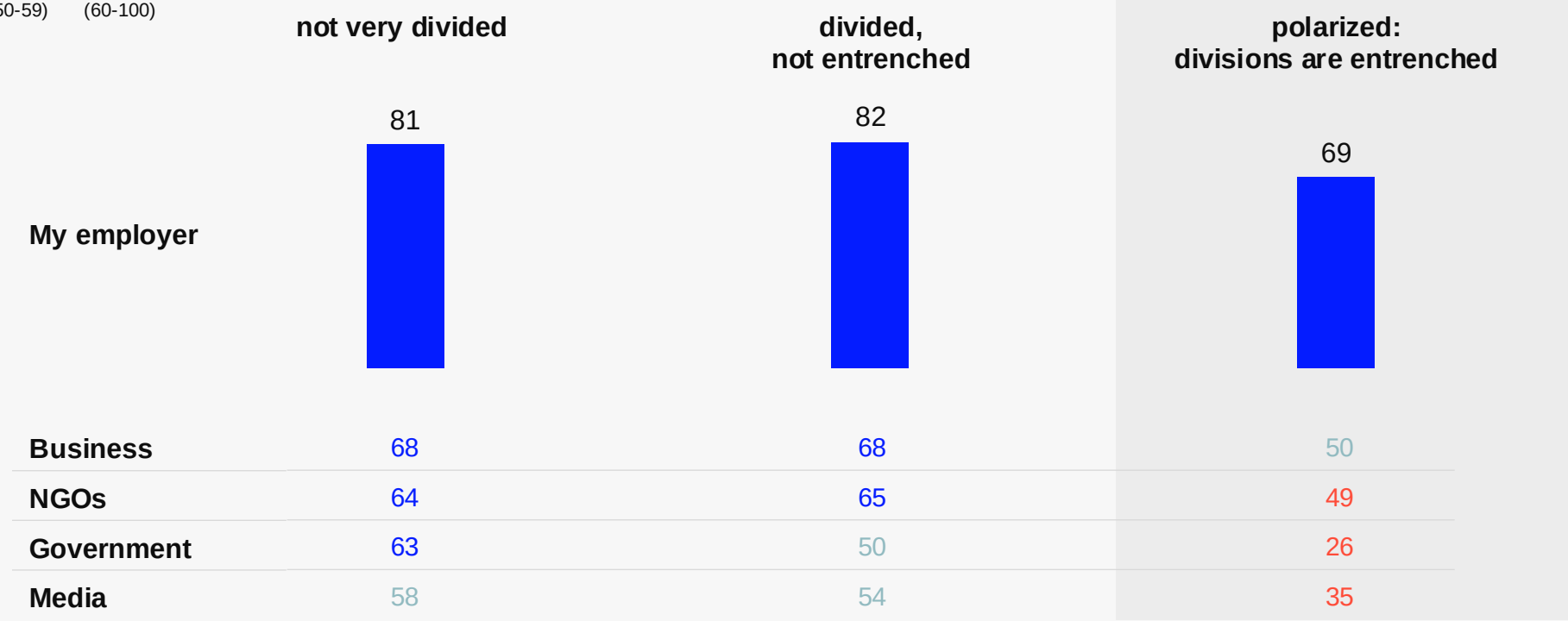
2023 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, APAC region and by market. "Your employer" only shown to those who are an employee of an organization (Q43/1). *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.

Among Those Who Feel Polarized, Employer Is Only Trusted Institution

Percent trust among those who say their country is…

GLOBAL 26 excludes France

Distrust (1-49) Neutral (50-59) Trust (60-100)



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. General population, 26-mkt avg. "Your employer" only shown to those who are an employee of an organization (Q43/1).

Due to a translation inconsistency, the France data was removed from the global data. For more details contact the Trust Barometer research team.

Consumers and Employees Pressure Business to Stand Up for Them

Percent who say

2022 Edelman Trust Barometer Special Report:
The New Cascade of Influence

I buy or advocate for brands based on my beliefs and values

GLOBAL 14

63%

2022 Edelman Trust Barometer Special Report:
Trust In the Workplace

Having societal impact is a strong expectation or deal breaker when considering a job (avg)

GLOBAL 7

Among employees

69%

Business reflects my values
Has a greater purpose
Meaningful work that shapes society
Opportunities to address social problems
Stops specific business practices if employees object
CEO addresses controversial issues I care about

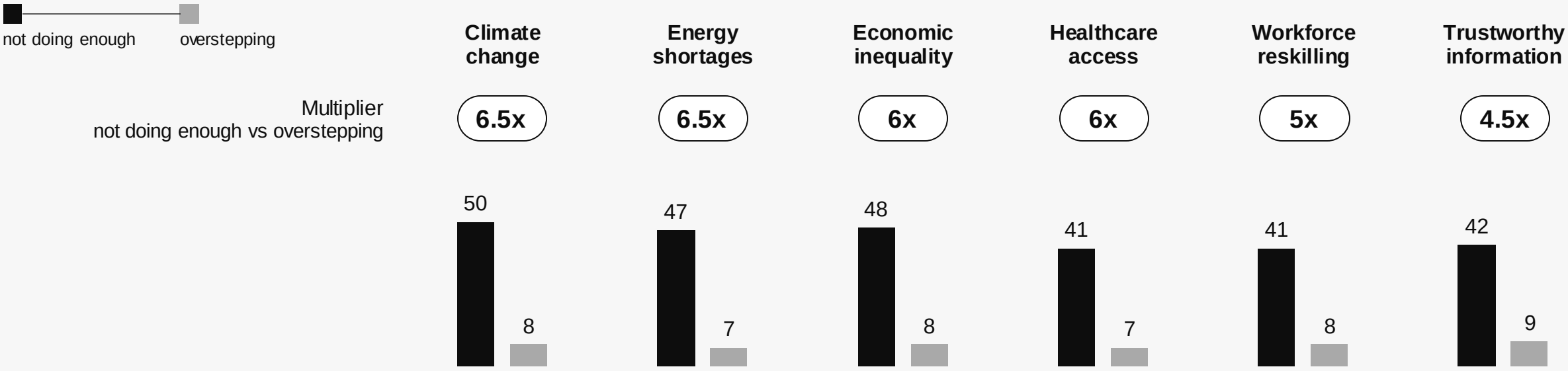
2022 Edelman Trust Barometer Special Report: The New Cascade of Influence. Belief-driven consumers. General population, 14-mkt avg. Please see the Technical Appendix for full explanation of how belief-driven consumers were measured.
2022 Edelman **Trust Barometer Special Report: Trust in the Workplace.** 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? 3-point scale; top 2 box, important. 7-mkt avg. All data is filtered to be among employees who work for an organization or corporation (Q43/1). "Societal impact" is an average of attributes 12-17.

Want More Societal Engagement from Business, Not Less

Percent who say, in APAC

APAC

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

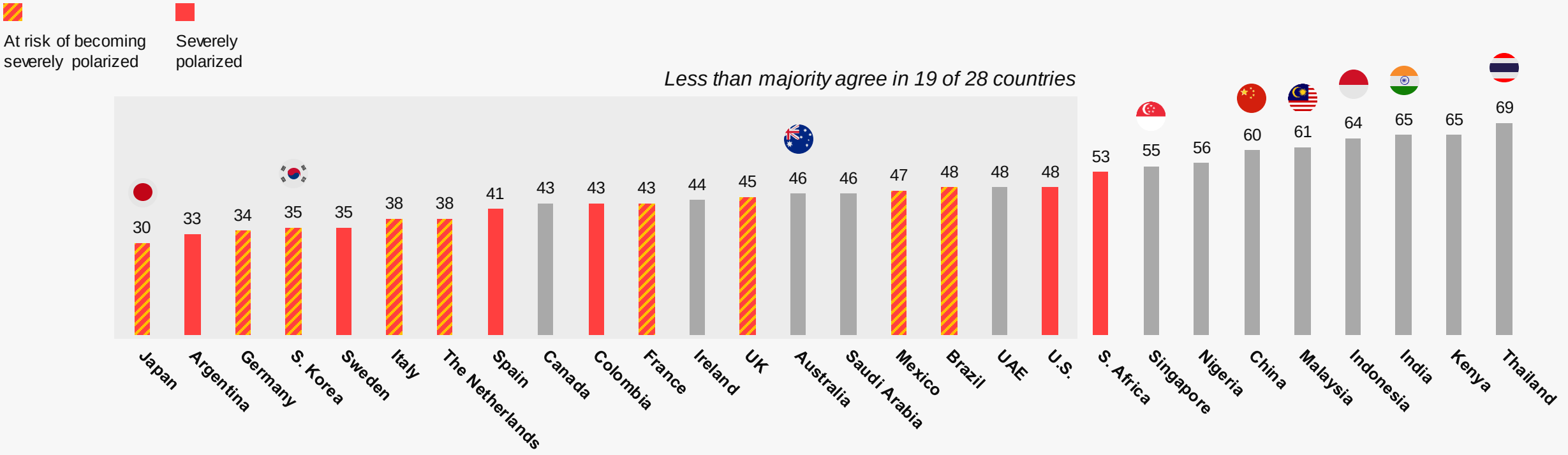


2023 Edelman Trust Barometer. BUS_BND. Think about business as an institution, and its current level of engagement in addressing societal needs and issues. When it comes to each of the following areas, please indicate if you think business is going too far and overstepping what it should be doing, is 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, APAC region. The multipliers are rounded to the nearest .5.

Societal Engagement Puts Business at Risk of Being Politicized

Percent who agree

I think **business can avoid being political** when it addresses contentious societal issues

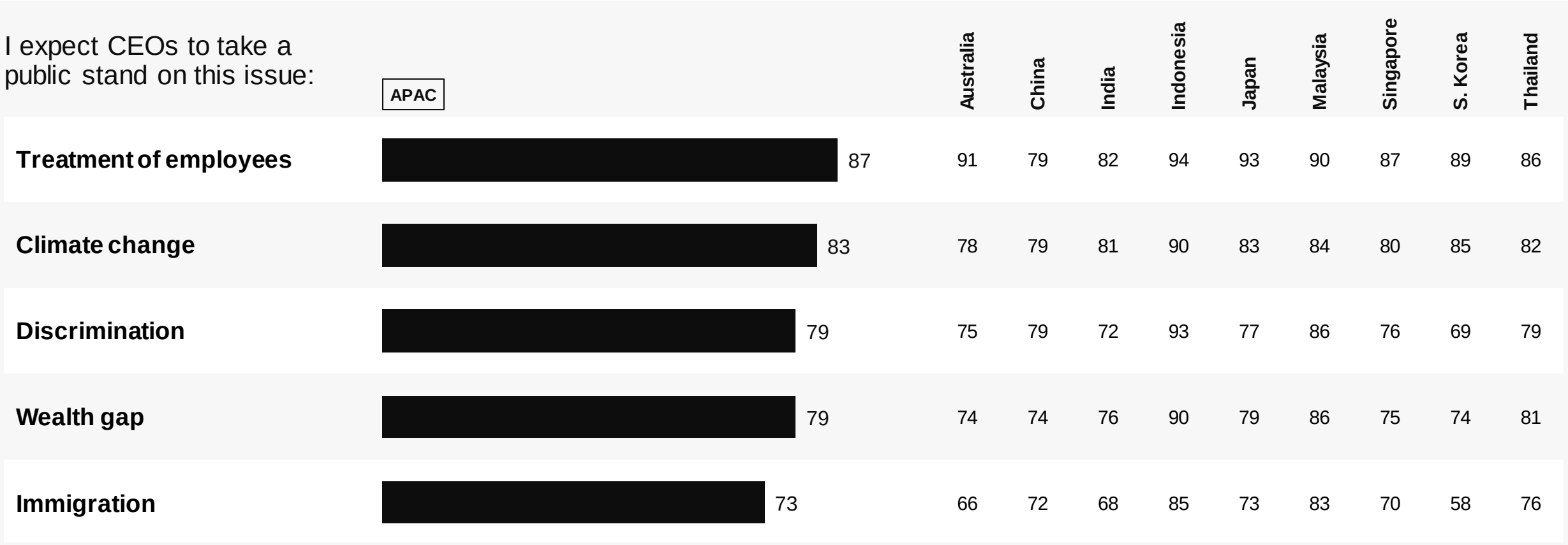


2023 Edelman Trust Barometer. ENG_ISS. Do you agree or disagree with the following statement: It is possible for a business to engage in addressing contentious societal issues in ways that I would not consider to be political or politically motivated. 9-point scale; top 4 box, agree. General population, 27-mkt avg.

Navigating a Polarized World

CEOs Most Expected To Act on Employees, Climate, and Discrimination

Percent who say, in APAC



2023 Edelman Trust Barometer. CEO_ISS_EXP. For each of the following issues, please indicate what you expect CEOs to do. 3-point scale; code 1, publicly take a stand; code 2, take a stand and use resources. Question asked of half of the sample. General population, APAC region. Data is rebased to exclude those that said, "don't know," and showing the sum of codes 1 and 2.

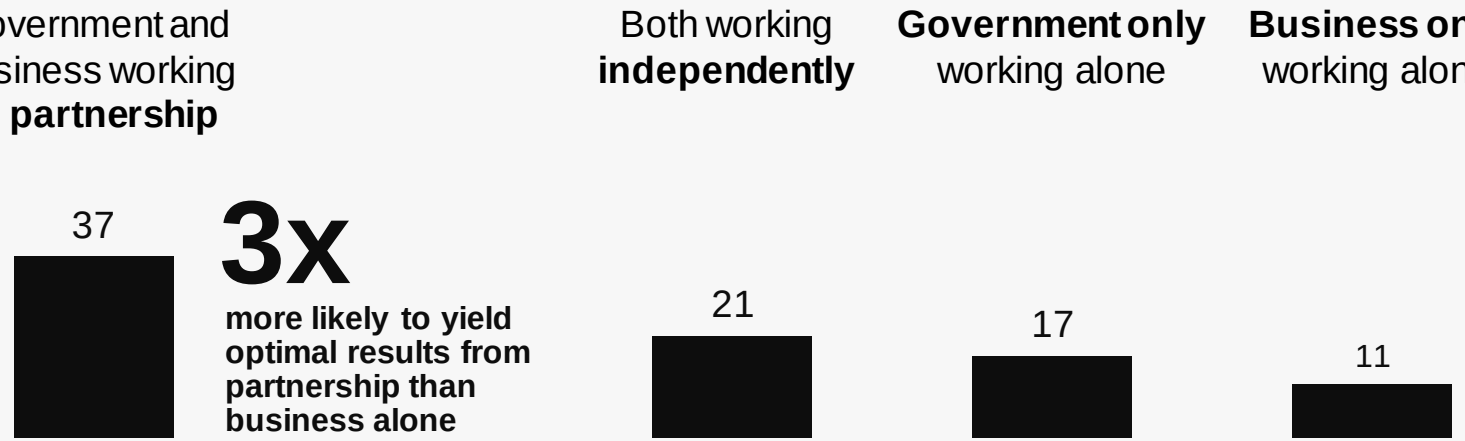
Best Societal Outcomes When Government and Business Work Together

Percent who say, in APAC

APAC Excludes China and Thailand

Approach most likely to result in **constructive action**

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

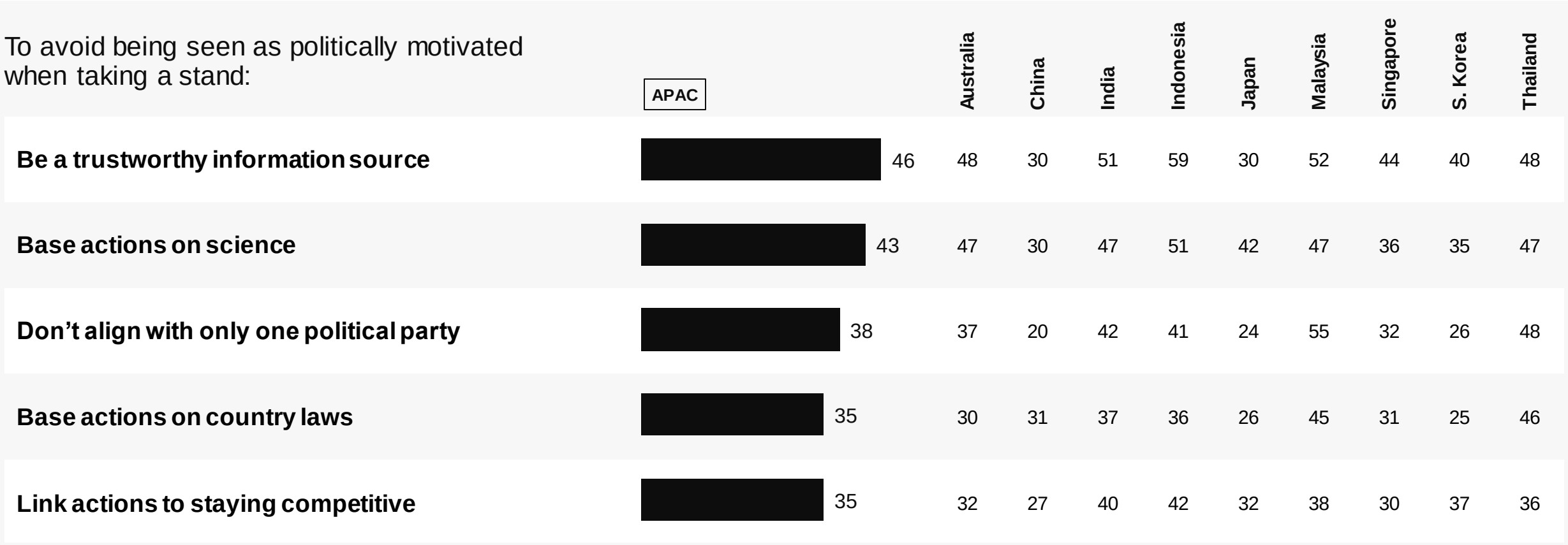


Australia	45	22	18	9
India	29	25	21	16
Indonesia	48	22	13	9
Japan	34	22	17	9
Malaysia	29	15	15	11
Singapore	43	18	18	11
S. Korea	34	20	16	8

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, APAC region. 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 54% who say it is possible for a business to address societal issues without being seen as politicized, percent who say, in APAC

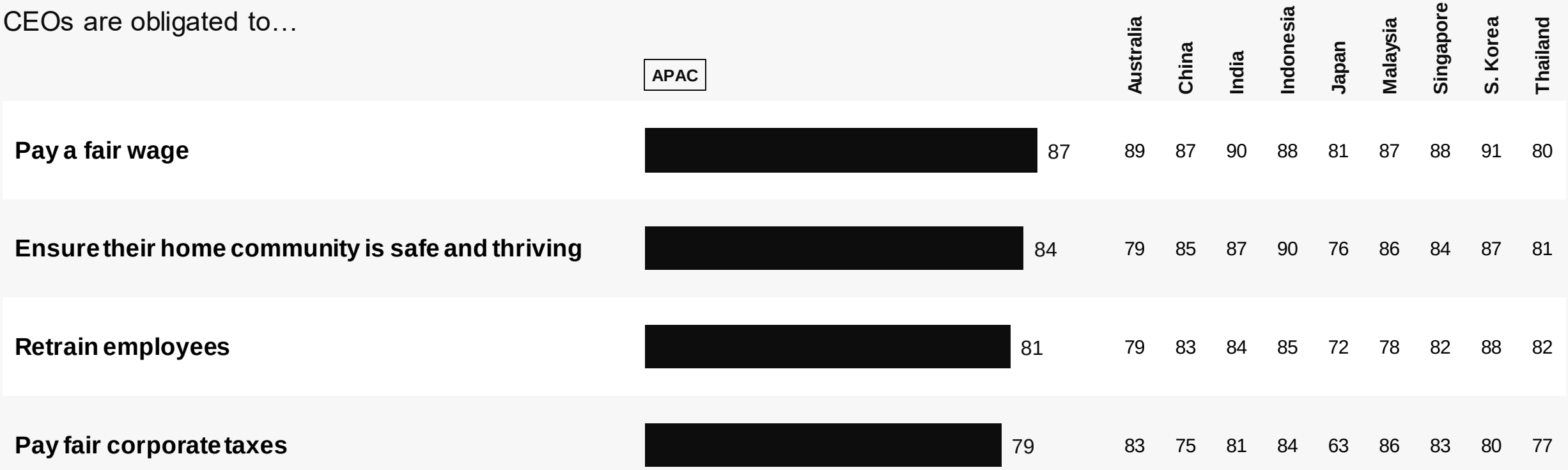


2023 Edelman Trust Barometer. ENG_ISS_HOW. You just said that it is possible for a business to engage in addressing contentious societal issues in ways that you would not consider to be political or politically motivated. Which of the following would be ways that a company could do that? Pick all that 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, APAC region.

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

Percent who say, in APAC

CEOs are obligated to…



2023 Edelman Trust Barometer. CEO_PLAY_BK. How obligated do you believe CEOs are to take the following actions? 5-point scale; top 3 box, obligated. Attributes shown to half of the sample. General population, APAC region.

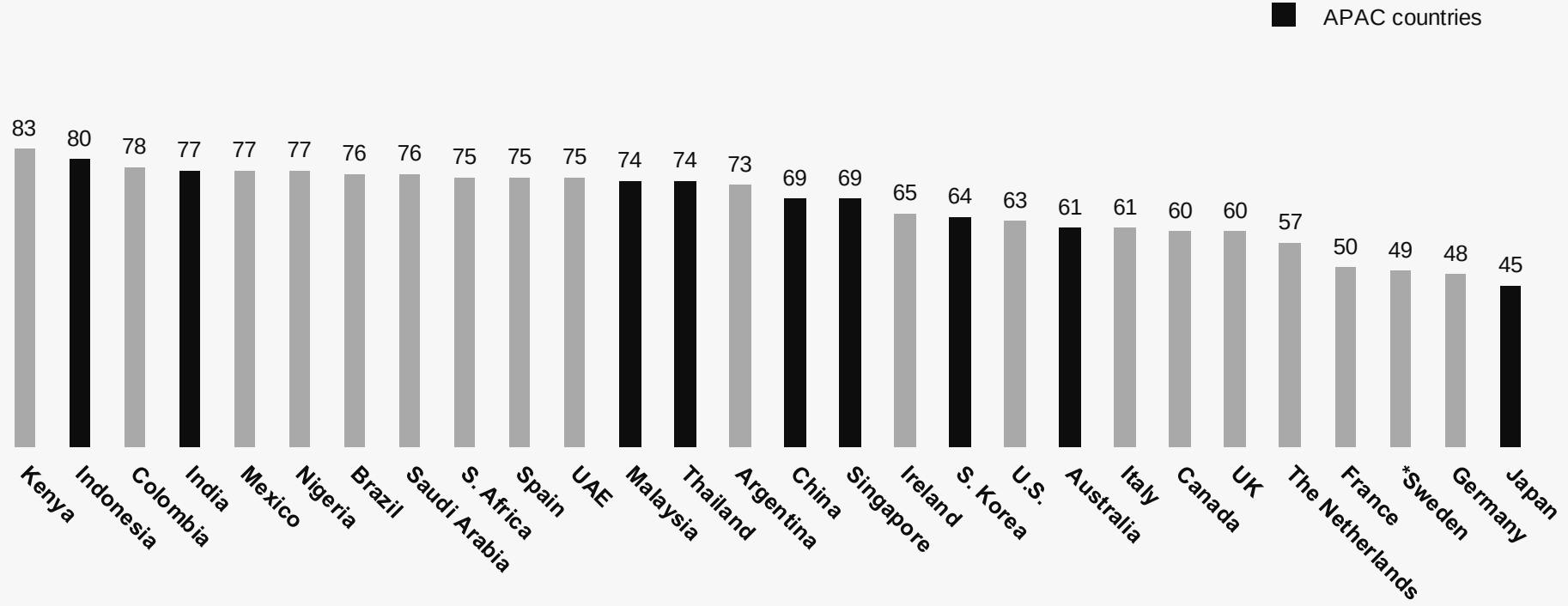
Use the Power of Brands To Create a Shared Identity

Percent who say

Brands celebrating what brings us together and emphasizing our common interest would strengthen the social fabric

APAC

68%



2023 Edelman Trust Barometer. POL_SOL. How important do you feel each of the following would be to increasing civility among people in your country and strengthening the social fabric that binds people together? 6-point scale; top 3 box, help strengthen the social fabric. Attributes shown to half of the sample. General population, APAC region and by market. *Sweden is not included in the global average.

Hold Divisive Forces Accountable

Percent who say, in APAC

APAC Excludes China and Thailand

I believe CEOs are obligated to…

Companies could strengthen the social fabric if they

Defend facts and **expose questionable science** used to justify bad social policy

74%

Pull advertising money from platforms that spread misinformation

77%

Support politicians and media that build consensus and cooperation (avg)

63%

2023 Edelman Trust Barometer. CEO_PLAY_BK. How obligated do you believe CEOs are to take the following actions? 5-point scale; top 3 box, obligated. Attributes shown to half of the sample. POL_SOL. How important do you feel each of the following would be to increasing civility among people in your country and strengthening the social fabric that binds people together? 6-point scale; top 3 box, help strengthen the social fabric. Attributes shown to half of the sample. General population, APAC region. Data for certain attributes not collected in China and Thailand. "When companies support politicians and media outlets that build consensus" is an average of attributes 2 and 9.

Navigating a Polarized World

1

Support your home base

Prioritize your local community and employees – directly address their anxiety and aim to reassure. Leverage your comparative advantage to inform debate and deliver solutions across climate, diversity and inclusion, and skill training.

2

Collaborate with government

The best results come when business and government work together, not independently. Look for opportunities to build consensus and collaborate on policies and standards to deliver results that push us toward a more just, secure, and thriving society.

3

Advocate for the truth

Business has an essential role to play in the information ecosystem. Be a source of reliable information, promote civil discourse, and hold false information sources accountable through corrective messaging, reinvestment, and other action.

4

Courage to take a stand

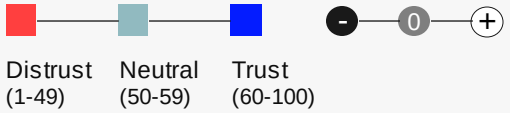
A grim economic view is both a driver and outcome of polarization that fuels distrust. Have the courage to take a stand on key issues that unify and hold divisive forces accountable.

Supplemental Data

Trust in APAC Brands Over Time

Percent trust

GLOBAL 21



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10yr change
Japan	59	65	59	61	62	61	68	66	59	58	59	0
S. Korea	40	45	41	43	44	44	48	46	48	46	46	+6
India	31	32	30	32	34	34	40	37	35	34	34	+3
China	33	35	33	34	35	36	39	36	33	30	29	-4

2023 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, 21-mkt avg.

Divisive Forces by APAC Countries

Percent trust

APAC

	APAC		Australia		China		India		Indonesia		Japan		Malaysia		Singapore		S. Korea		Thailand	
	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing	Unifying	Dividing
Hostile foreign governments	24	58	15	69	39	51	37	45	34	48	17	63	20	59	23	62	23	60	41	41
Rich and powerful	24	55	12	72	39	47	33	48	36	46	18	55	29	50	24	56	20	56	35	51
Government leaders	42	40	30	49	-	-	41	43	65	21	37	38	35	45	57	27	26	56	-	-
Journalists	36	40	24	51	-	-	43	40	56	24	31	41	41	33	37	36	22	56	-	-
Business leaders	46	26	31	36	58	31	53	28	61	15	47	22	46	24	41	32	44	24	52	30
NGO leaders	47	26	35	29	53	33	55	29	53	26	41	23	50	21	49	27	46	26	53	29
Teachers	63	19	60	24	64	26	69	22	81	10	49	23	66	15	63	23	54	19	61	22

2023 Edelman Trust Barometer. PROB_PLP. Ideological differences will always exist among people, but there are some groups of people that are perhaps making things worse than they might otherwise be by fueling divisions and fomenting a lack of civility between people who hold different views. In contrast, there are some groups of people that are perhaps making things better than they might otherwise be by working to foster cooperation between people who hold different views. In thinking about each group of people listed below, please specify where you think they fall on the scale between being a unifying force in society and being a dividing force. 11-point scale; codes 7-11, a dividing force in society; codes 1-5, a unifying force in society. Some attributes asked of half of the sample. General population, APAC region. "Journalists" and "Government leaders" not asked in China and Thailand.

Trust in People by APAC countries

Percent who say

APAC

Distrust (1-49) Neutral (50-59) Trust (60-100)

- 0 +

Significant change

	APAC		Australia		China		India		Indonesia		Japan		Malaysia		Singapore		S. Korea		Thailand	
Change, 2022 to 2023	%	+/-																		
Government leaders	51	**-3**	41	-2	85	0	62	0	66	-2	22	-6	40	**-11**	70	+6	22	**-13**	52	-2
Journalists	52	0	36	-2	76	0	65	+1	67	-4	27	+4	50	-6	55	+1	23	0	64	+3
CEOs	58	-2	39	-4	81	-1	74	-2	73	-3	35	+1	54	-7	56	+4	37	**-8**	73	0
People in my local community	65	-2	64	0	77	**-8**	78	0	78	-3	47	+6	68	+1	65	+2	38	**-13**	70	-3
Citizens of my country	66	+1	61	+2	82	-2	82	+2	77	+1	42	+1	66	+1	65	+3	50	-1	70	+1
My neighbors	66	-	65	-	80	-	81	-	71	-	44	-	69	-	68	-	45	-	69	-
My CEO	69	0	56	-5	86	+1	82	0	82	-4	46	+4	69	0	64	+3	46	-5	82	0
My coworkers	75	0	73	0	84	-1	89	+3	83	-3	60	+8	74	+1	70	0	60	-4	82	+1
Scientists	76	-1	70	-1	85	-5	90	+4	87	-2	58	0	76	+2	73	+1	68	-2	80	+2

2023 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. Some attributes asked of half of the sample. General population, APAC region. "My coworkers" and "my CEO" only shown to those who are an employee of an organization (Q43/1). Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Polarization Worsens Fears by APAC Countries

Among those who say their country is divided on key issues, percent who say

	APAC	Australia	China	India	Indonesia	Japan	Malaysia	Singapore	S. Korea	Thailand
Worsening prejudice and discrimination	50	41	-	41	58	47	61	35	63	-
Slower economic development	45	39	-	44	55	39	63	34	43	-
Inability to address societal challenges	43	38	-	33	49	52	47	34	49	-
Loss of our country's influence	34	22	-	37	33	44	43	25	36	-
Lack of cooperation with authorities	33	28	-	36	48	17	38	29	36	-
Violence in the streets	31	31	-	46	46	14	42	20	20	-
Government gridlock	31	27	-	25	31	32	44	17	39	-
I will suffer financially	31	34	-	28	24	28	44	28	30	-
End of our democracy	29	18	-	28	36	28	45	17	27	-
Greater personal safety risk	28	24	-	29	31	23	38	23	26	-
Disruptions in the workplace	26	26	-	28	26	11	34	23	31	-
Damaged personal relationships	14	8	-	22	17	8	17	14	11	-
Lost career opportunities	12	7	-	21	15	5	16	15	6	-

2023 Edelman Trust Barometer. NAT_POL_CONS. What do you see as the likely consequences of these divisions within your country if they are not addressed? Pick all that apply. Question asked among those who say their country is divided on key issues (POL_DEG/2-5). General population, APAC region. Data not collected in China and Thailand. The order shown is based on top 5 rank with ties broken by decimals.

Societal Engagement by APAC Countries

Percent who say

APAC

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

	APAC			Australia			China			India			Indonesia			Japan			Malaysia			Singapore			S. Korea			Thailand		
	Not doing enough	Over-stepping	Multiplier																											
Climate change	50	8	6.5	49	11	4.5	44	11	4.0	40	14	3.0	48	5	9.5	63	4	16.0	45	7	6.5	52	6	8.5	64	3	21.5	42	7	6.0
Energy shortages	47	7	6.5	50	8	6.5	40	10	4.0	38	13	3.0	40	7	5.5	66	3	22.0	43	8	5.5	48	6	8.0	57	4	14.5	40	8	5.0
Economic inequality	48	8	6.0	49	6	8.0	41	12	3.5	37	14	2.5	45	7	6.5	62	2	31.0	47	9	5.0	45	6	7.5	60	4	15.0	41	9	4.5
Healthcare access	41	7	6.0	43	6	7.0	41	10	4.0	36	12	3.0	36	6	6.0	44	3	14.5	38	8	5.0	41	4	10.5	49	5	10.0	39	6	6.5
Workforce reskilling	41	8	5.0	45	6	7.5	40	13	3.0	30	16	2.0	35	7	5.0	50	4	12.5	36	9	4.0	41	7	6.0	55	4	14.0	34	10	3.5
Trustworthy information	42	9	4.5	45	7	6.5	35	14	2.5	34	14	2.5	38	9	4.0	55	3	18.5	38	9	4.0	38	8	5.0	53	4	13.5	38	11	3.5

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, APAC region. The multipliers are rounded to the nearest .5.

Societal Engagement by APAC Countries

Percent who say

APAC

	APAC	Australia	China	India	Indonesia	Japan	Malaysia	Singapore	S. Korea	Thailand
I believe CEOs are obligated to…										
Defend facts and expose questionable science used to justify bad social policy	75	72	82	84	74	58	78	76	75	80
Pull advertising money from platforms that spread misinformation	77	73	-	85	68	65	83	79	85	-
Companies could strengthen the social fabric if they…										
Support politicians and media that build consensus and cooperage (average)	64	57	66	69	73	45	66	65	64	65

2023 Edelman Trust Barometer. CEO_PLAY_BK. How obligated do you believe CEOs are to take the following actions? 5-point scale; top 3 box, obligated. Attributes shown to half of the sample. POL_SOL. How important do you feel each of the following would be to increasing civility among people in your country and strengthening the social fabric that binds people together? 6-point scale; top 3 box, help strengthen the social fabric. Attributes shown to half of the sample. General population, APAC region. Data for certain attributes not collected in China and Thailand. "When companies support politicians and media outlets that build consensus" is an average of attributes 2 and 9.

Trust Index: Trust Stable Amid Economic Headwinds

Trust Index

(the average percent trust in NGOs, business, government and media)

Significant change

Distrust (1-49) | Neutral (50-59) | Trust (60-100)

2022 General population		2023 General population	
57	Global 26	55	Global 26
83	China	83	China
76	UAE	75	Indonesia
75	Indonesia	74	UAE
74	India	73	India
72	Saudi Arabia	71	Saudi Arabia
66	Malaysia	66	Singapore
66	Singapore	66	Thailand
66	Thailand	63	Kenya
60	Kenya	62	Malaysia
59	Mexico	61	Mexico
57	The Netherlands	56	Nigeria
56	Nigeria	54	The Netherlands
54	Canada	53	Brazil
53	Australia	52	Canada
53	Italy	51	Colombia
51	Brazil	50	Italy
51	Ireland	48	Australia
48	Colombia	48	Ireland
48	S. Africa	48	U.S.
46	Germany	47	S. Africa
45	Argentina	46	Germany
45	Spain	44	Spain
44	UK	43	UK
43	U.S.	42	Argentina
42	S. Korea	38	Japan
40	Japan	36	S. Korea

- 0 +

Change, 2022 to 2023

Biggest gainers:

U.S.	+5
Colombia	+3
Kenya	+3

Biggest losers:

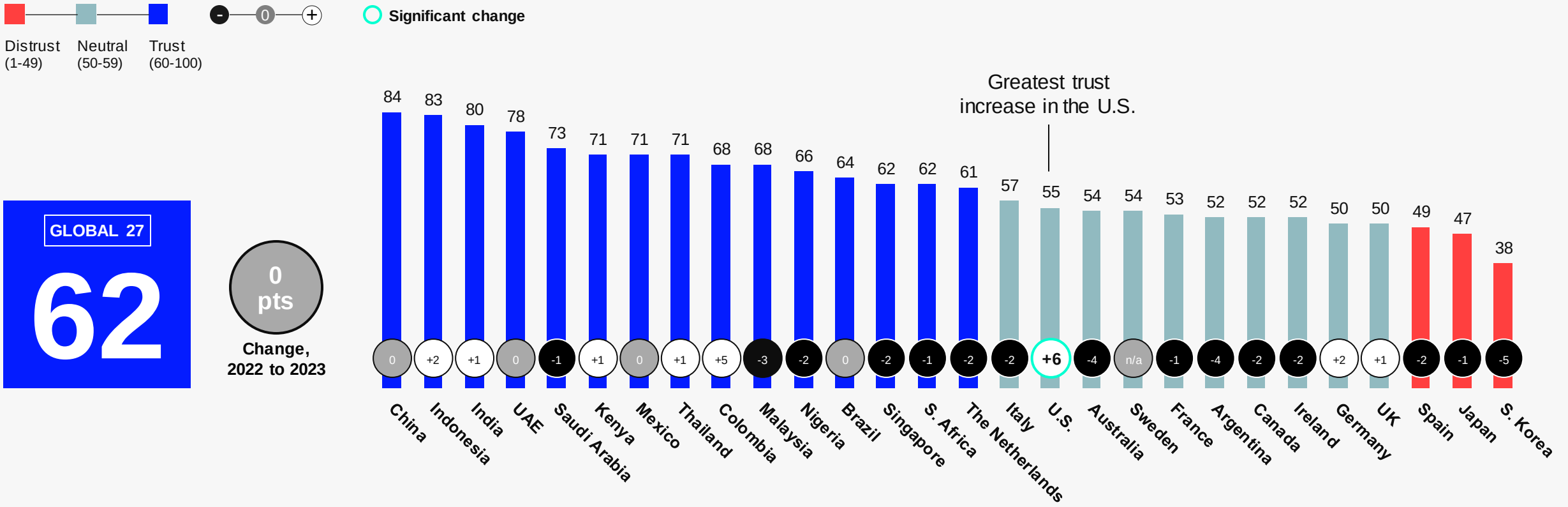
S. Korea	-6
Australia	-5
Malaysia	-4

2023 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, 26-mkt avg. *Sweden is not included in the global average.

Due to a translation inconsistency, the France data was removed from this slide. For more details contact the Trust Barometer research team.

Trust in Business Declines in 15, Gains in 8 of 27 Countries

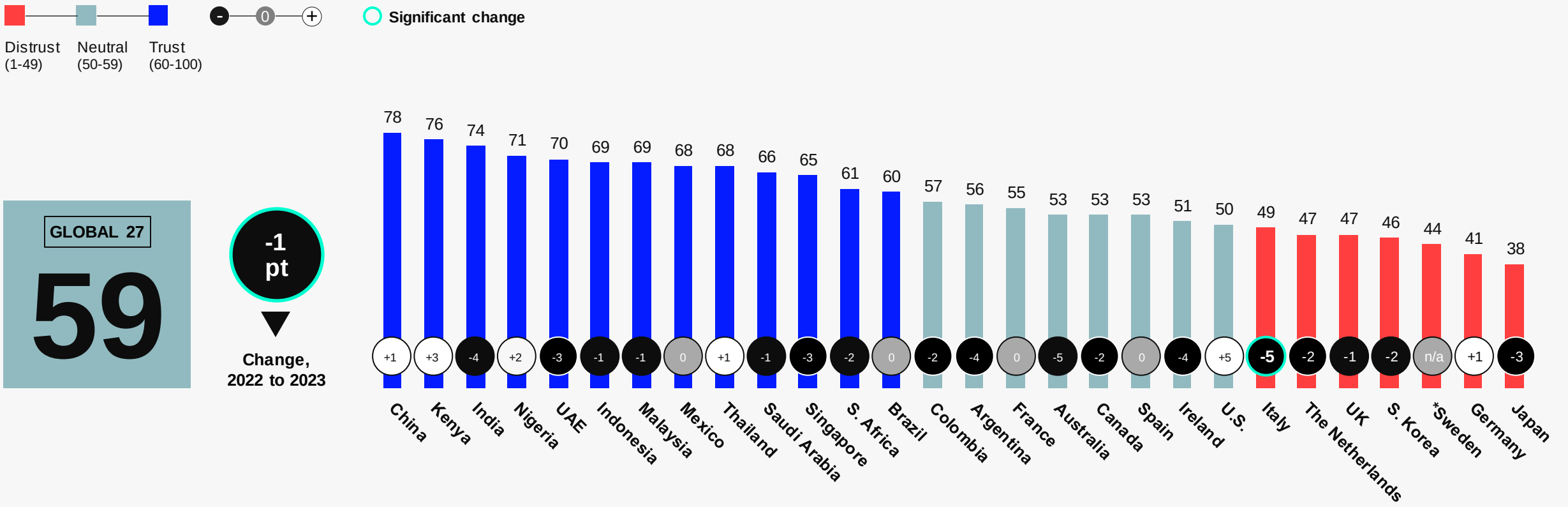
Percent trust



2023 Edelman Trust Barometer. 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, 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 NGOs Declines in 17, Gains in 6 of 27 Countries

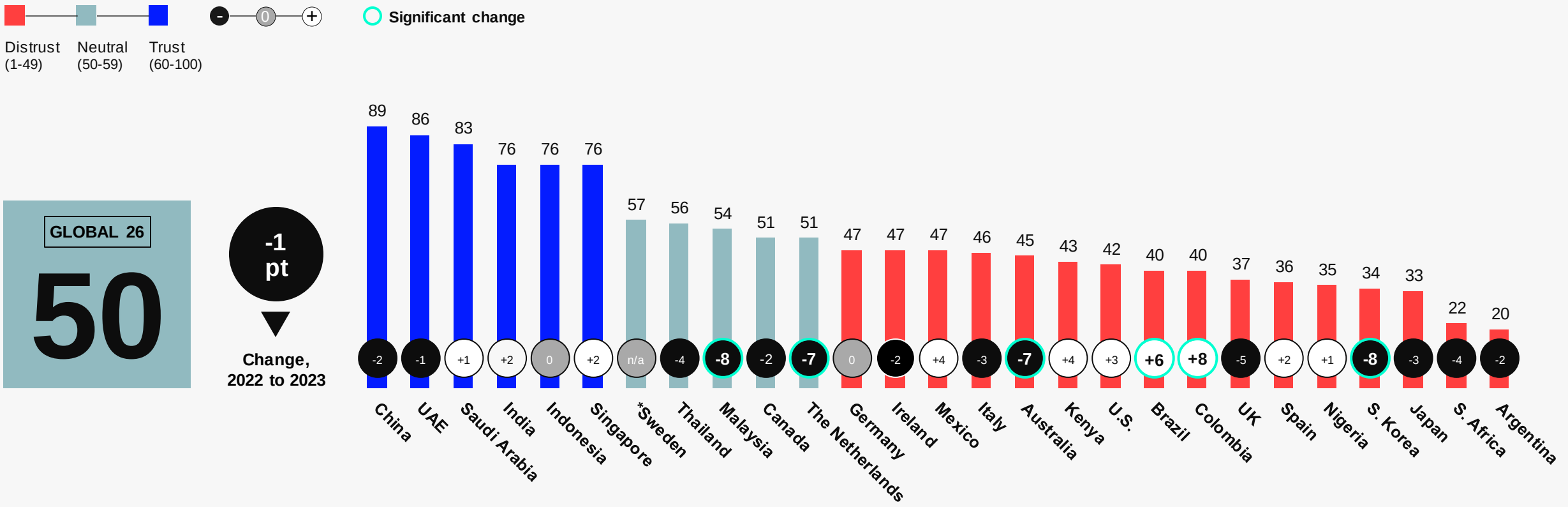
Percent trust



2023 Edelman Trust Barometer. TRU_INS. [NGOs] 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. *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 Government Declines in 14, Gains in 10 of 26 Countries

Percent trust

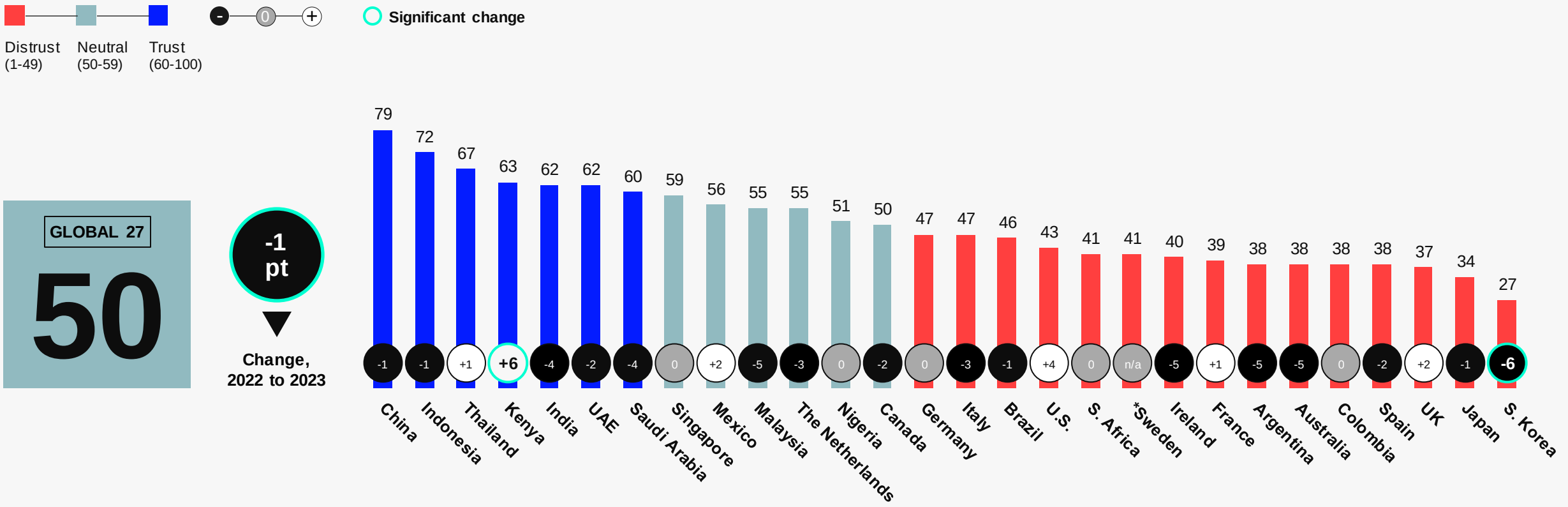


2023 Edelman Trust Barometer. TRU_INS. [GOVERNMENT] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 26-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Due to a translation error, the France data was removed from this slide. For more details contact the Trust Barometer research team.

Trust in Media Declines in 16, Gains in 6 of 27 Countries

Percent trust

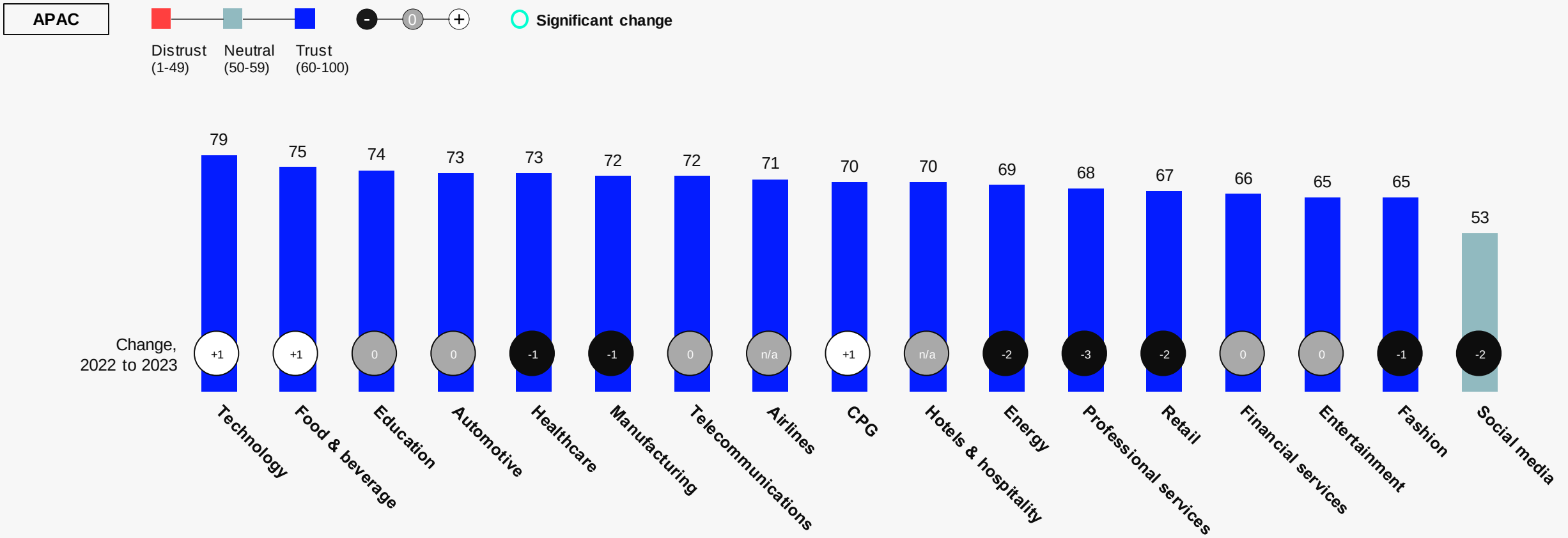


2023 Edelman Trust Barometer. TRU_INS. [MEDIA] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. *Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Note: in S. Korea, the term used for Media means "News media".

Trust in Industry Sectors Remains Stable

Percent trust, in APAC



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, APAC region.
Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

Family-Owned Businesses Most Trusted

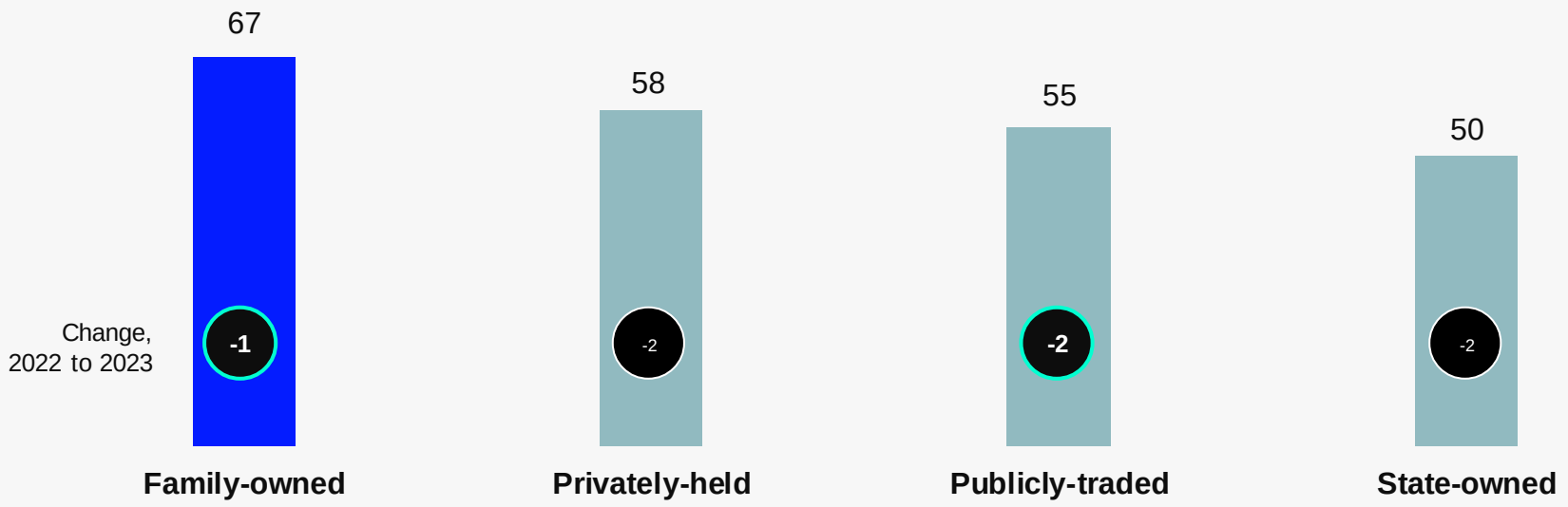
Percent who trust each type of business to do what is right

GLOBAL 27

Distrust (1-49) Neutral (50-59) Trust (60-100)

- 0 +

Significant change



2023 Edelman Trust Barometer. TRU_ORG. Thinking about different types of businesses, please indicate how much you trust each type of business to do what is right. 9-point scale; top 4 box, trust. Question asked of 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.

WHO Most Trusted Multinational Organization

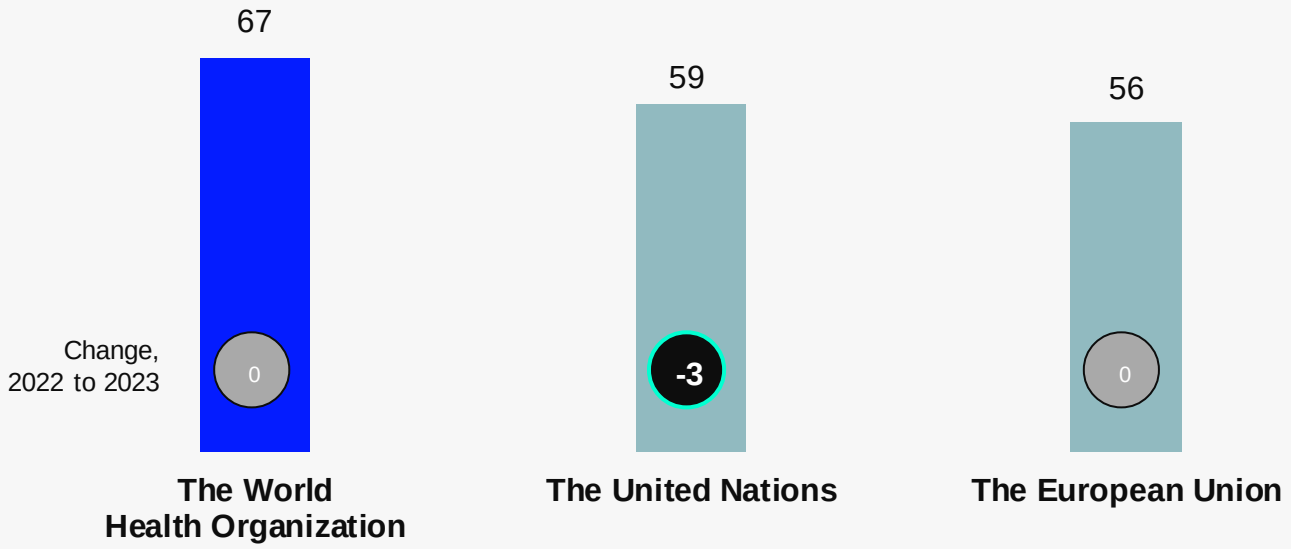
Percent trust

GLOBAL 27

Distrust (1-49) Neutral (50-59) Trust (60-100)

- 0 +

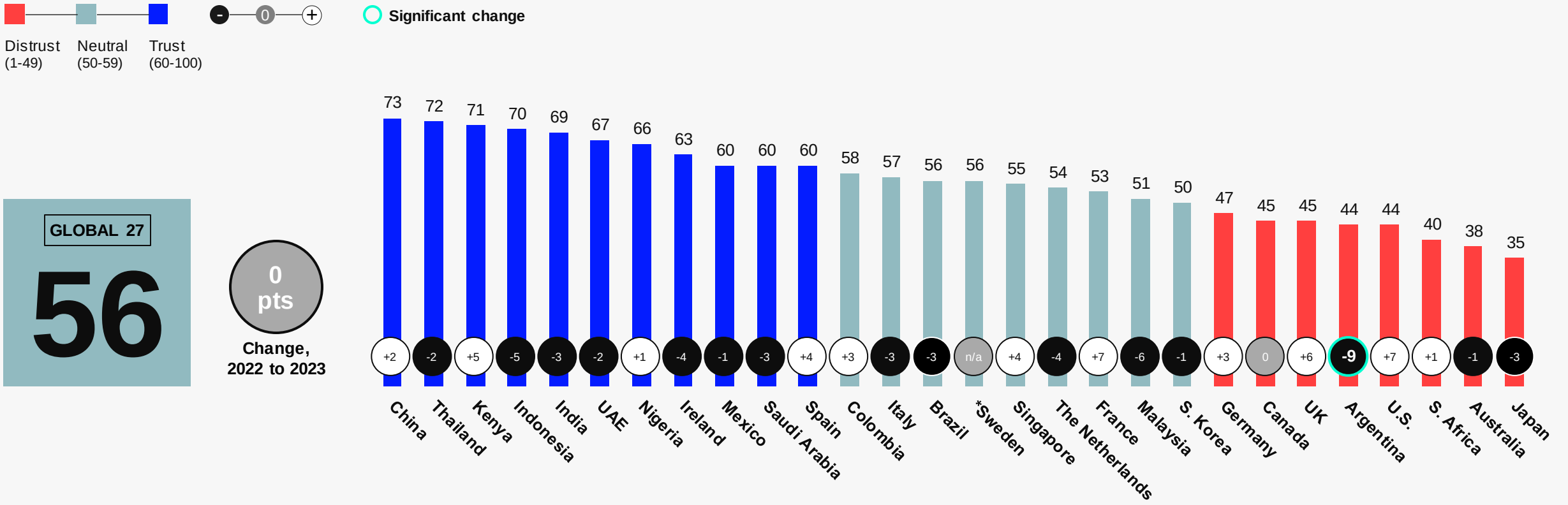
Significant change



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. Attributes asked of 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 European Union Increases in 11 of 27 Countries

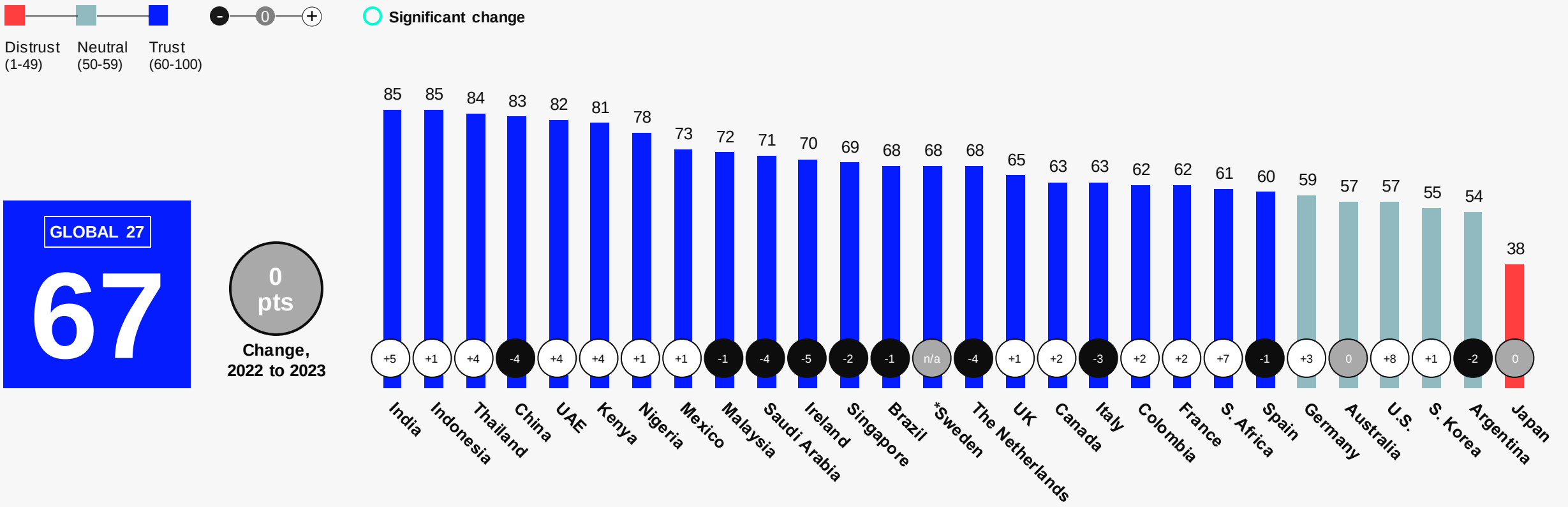
Percent trust



2023 Edelman Trust Barometer. TRU_INS. [THE EUROPEAN UNION] 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. 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.

Trust in the World Health Organization Increases in 15 of 27 Countries

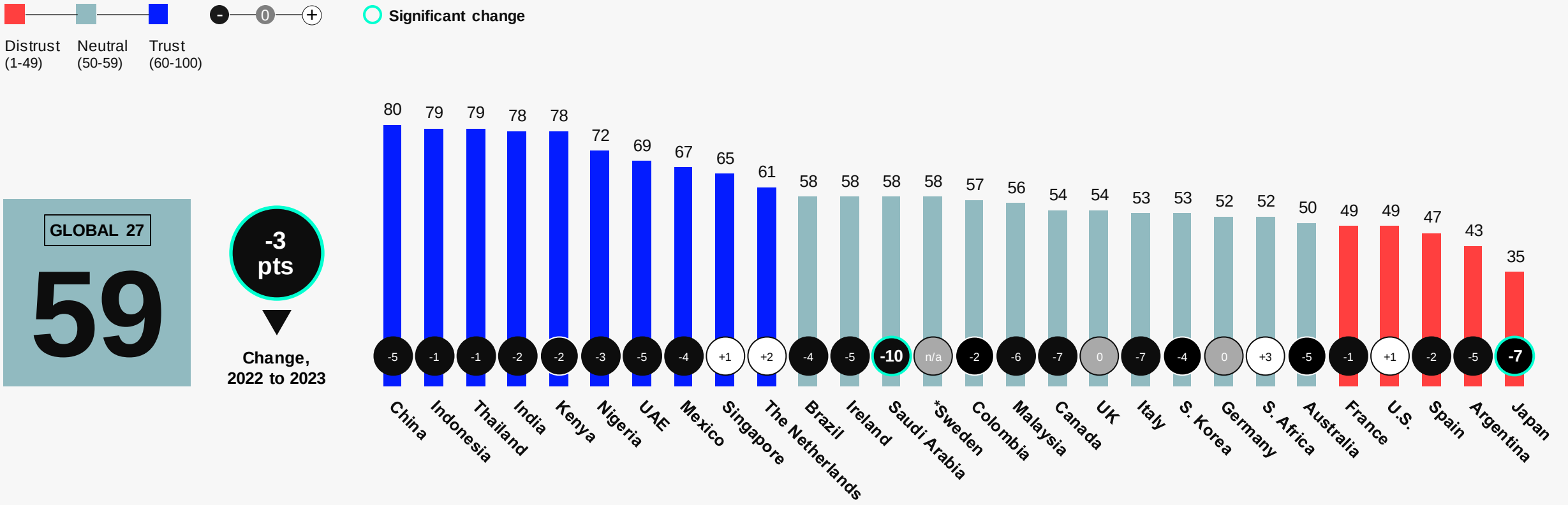
Percent trust



2023 Edelman Trust Barometer. TRU_INS. [THE WHO] 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. 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.

Trust in the United Nations Decreases in 21 of 27 Countries

Percent trust



2023 Edelman Trust Barometer. TRU_INS. [THE UNITED NATIONS] 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. 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.

Minimal Trust Gains for News Sources

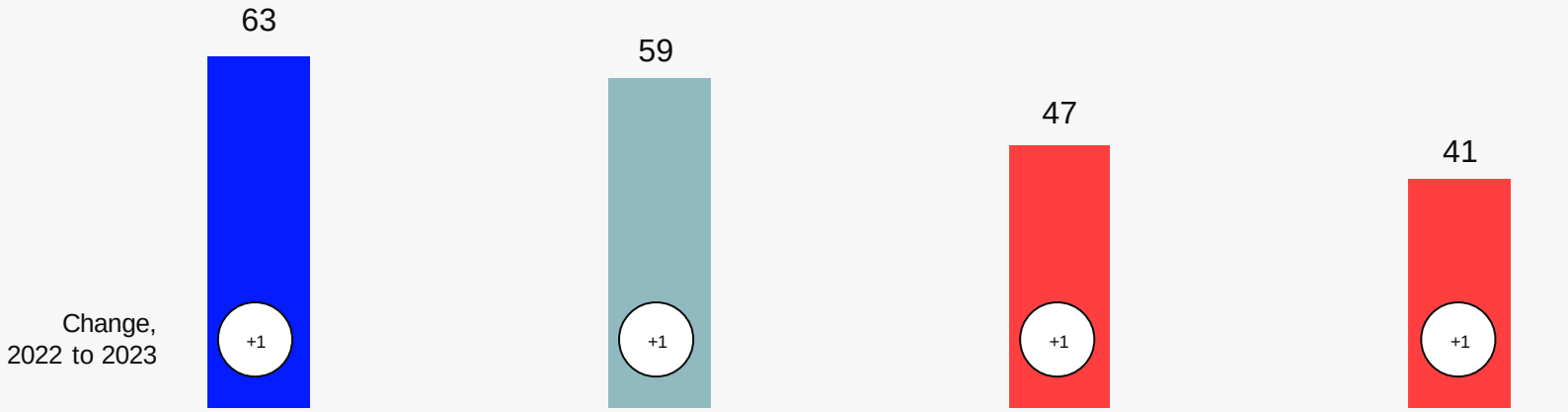
Percent trust

GLOBAL 27

Distrust (1-49) Neutral (50-59) Trust (60-100)

- 0 +

Significant change



	Search engines	Traditional media	Owned media	Social media
Least-trusting countries for each source	S. Korea 49	U.S. 48	Japan 29	Canada 21
	France 47	S. Korea 43	*Sweden 25	France 19
	Japan 44	Japan 39	S. Korea 22	*Sweden 19

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

Technical Appendix

2023 Edelman Trust Barometer: Sample

Sample Size, Quotas and Margin of Error

Market	Weighed Sample Size[1]	Unweighted Sample Size	Margin of Error – Total Sample[2]	Margin of Error – Half Sample[2]	Quotas Set On[3]
Global 27	31,050	31,171	+/- 0.6 percentage points total sample	+/- 0.8 percentage points half sample	Quotas set at the market level
Argentina	1,150	1,120			
Australia	1,150	1,152	+/- 2.9 pct pts. total sample	+/- 4.1 pct pts. half sample	
Brazil	1,150	1,150			
Canada	1,150	1,500	+/- 2.5 pct pts. total sample	+/- 3.6 pct pts. half sample	
China[4]	1,150	1,149			
Colombia	1,150	1,151			
France	1,150	1,151			
Germany	1,150	1,150			
India	1,150	1,145			
Indonesia	1,150	1,118			
Ireland	1,150	1,150	+/- 2.9 pct pts. total sample	+/- 4.1 pct pts. half sample	
Italy	1,150	1,151			
Japan	1,150	1,150			
Kenya	1,150	1,150			
Malaysia	1,150	1,120			Age, Gender, Region
Mexico	1,150	1,150			
Nigeria	1,150	1,142			
Saudi Arabia	1,150	1,082	+/- 3.0 pct pts. total sample	+/- 4.2 pct pts. half sample	
Singapore	1,150	1,135			
S. Africa	1,150	1,153			
S. Korea	1,150	1,150			
Spain	1,150	1,150			
Sweden	1,150	1,150			
Thailand	1,150	1,133	+/- 2.9 pct pts. total sample	+/- 4.1 pct pts. half sample	
The Netherlands	1,150	1,142			
UAE	1,150	1,143			
UK	1,150	1,150			
U.S.	1,150	1,134			

1. Data reported on slides is weighted to the same total base size to ensure each market has an equal effect on the global total Some questions were asked of only half of the sample. Please refer to the footnotes on each slide for details.
2. Margin of error is calculated on the unweighted sample sizes collected.
3. There were additional quotas on ethnicity in the UK and U.S., and on nationality in the UAE and Saudi Arabia.
4. All data collected in China is from the mainland. Regions of Greater China were not surveyed.

2023 Edelman Trust Barometer: Sample

Countries Included in the Various Global Averages

28 countries surveyed	Global 27 average	Global 26 Excludes France	Global 25 Excludes China and Thailand	Global 24 Excludes China and Thailand	Global 24
	Used for current year averages and tracking to 2022	Used for current year averages; excludes France[2]	Used for tracking to 2022; excludes sensitive markets[1]	Used for tracking to 2020; excludes sensitive markets[1]	Used for tracking to 2019
Argentina	Argentina	Argentina	Argentina	Argentina	Argentina
Australia	Australia	Australia	Australia	Australia	Australia
Brazil	Brazil	Brazil	Brazil	Brazil	Brazil
Canada	Canada	Canada	Canada	Canada	Canada
China	China	China	-----	-----	China
Colombia	Colombia	Colombia	Colombia	Colombia	Colombia
France	France	-----	France	France	France
Germany	Germany	Germany	Germany	Germany	Germany
India	India	India	India	India	India
Indonesia	Indonesia	Indonesia	Indonesia	Indonesia	Indonesia
Ireland	Ireland	Ireland	Ireland	Ireland	Ireland
Italy	Italy	Italy	Italy	Italy	Italy
Japan	Japan	Japan	Japan	Japan	Japan
Kenya	Kenya	Kenya	Kenya	Kenya	-----
Malaysia	Malaysia	Malaysia	Malaysia	Malaysia	Malaysia
Mexico	Mexico	Mexico	Mexico	Mexico	Mexico
Nigeria	Nigeria	Nigeria	Nigeria	-----	-----
Saudi Arabia	Saudi Arabia	Saudi Arabia	Saudi Arabia	Saudi Arabia	Saudi Arabia
Singapore	Singapore	Singapore	Singapore	Singapore	Singapore
S. Africa	S. Africa	S. Africa	S. Africa	S. Africa	S. Africa
S. Korea	S. Korea	S. Korea	S. Korea	S. Korea	S. Korea
Spain	Spain	Spain	Spain	Spain	Spain
Sweden	-----	-----	-----	-----	-----
Thailand	Thailand	Thailand	-----	-----	-----
The Netherlands	The Netherlands	The Netherlands	The Netherlands	The Netherlands	The Netherlands
UAE	UAE	UAE	UAE	UAE	UAE
UK	UK	UK	UK	UK	UK
U.S.	U.S.	U.S.	U.S.	U.S.	U.S.

1. Because some of the content we ask is deemed politically sensitive there are several countries where we take special precautions in order to avoid putting our respondents, or ourselves, in a position to break any local laws. We work closely with our sample partner and its legal team to identify which questions, and in what countries, we should refrain from asking. The two countries where we removed questions and/or answer options were China and Thailand.

2. Due to a translation inconsistency, the France data was removed from the global data. For more details contact the Trust Barometer research team.

2023 Edelman Trust Barometer: Sample

Survey Languages Used and Internet Penetration by Country

	Languages	Internet Penetration*		Languages	Internet Penetration*		Languages	Internet Penetration*
Global	-	87%	**Indonesia**	Indonesian	76%	**S. Africa**	Localized English, Afrikaans	63%
Argentina	Localized Spanish	91%	**Ireland**	Localized English	89%	**S. Korea**	Korean	97%
Australia	Localized English	89%	**Italy**	Italian	91%	**Spain**	Spanish	92%
Brazil	Portuguese	83%	**Kenya**	Localized English	84%	**Sweden**	Localized English, Swedish	97%
Canada	Localized English, Canadian French	93%	**Japan**	Japanese	93%	**Thailand**	Thai	88%
China	Simplified Chinese	70%	**Malaysia**	Malay	94%	**The Netherlands**	Localized English, Dutch	95%
Colombia	Localized Spanish	83%	**Mexico**	Localized Spanish	77%	**UAE**	Localized English, Arabic	100%
France	French	92%	**Nigeria**	Localized English	68%	**UK**	Localized English	95%
Germany	German	94%	**Saudi Arabia**	Localized English, Arabic	89%	**U.S.**	English, Localized Spanish	94%
India	Localized English, Hindi	60%	**Singapore**	Localized English, Simplified Chinese	92%			

*Data source: http://www.internetworldstats.com/stats.htm as of 1/5/23

Data Analyses Explained:

How We Plotted Countries by Polarization Levels

To visualize country-level polarization, we plotted countries based on the percentage of respondents in each country who see deep divisions and feel those divisions are entrenched.

Depth of Division forms the y-axis. A country's Division score is the percent who believe their country is very/extremely divided, using **POL_DEG**.*

POL_DEG. Using the scale below, please indicate how divided on key societal issues you believe your country is today. 5-point scale; top 2 box = very/extremely divided.*

A country's Entrenchment score is on the x-axis. It's the percent who do not believe that their country will be able to work through its divisions, using **POL_PROG**. This score was measured *only among respondents who believe their country is very/extremely divided* (**POL_DEG**/4-5).

POL_PROG. How likely or unlikely do you think it is that your country will be able to work through or overcome its ideological divisions and lack of agreement on key issues and challenges? 8-point scale; codes 2-5 = unlikely/neutral, among POL_DEG/4-5 = Entrenched

The table to the right shows each country's Division and Entrenchment score, as well as the total Polarization score. Cut-points were then determined that would allow us to group countries based their level of polarization. The first step in the cut-point determination process was to look for natural gaps in the scores. We then further tested these cut-points by profiling countries in each of the 4 resulting groupings to make sure that they displayed differences along key polarization-related dimensions. The final cut points used to characterize a country's level of Polarization is shown below.

- **Severely polarized**: sum of 130 or higher
- **In danger of severe polarization**: sum between 115 to 129
- **Moderately polarized**: sum between 80 to 114
- **Not polarized**: sum less than 80

*Division score was calculated using a rebased POL_DEG excluding respondents who selected "don't know."

Country	Division (y-axis)	Entrenchment (x-axis)	Polarization score (sum)
Argentina	87	77	164
Colombia	74	62	136
U.S.	67	66	133
Spain	56	77	133
S. Africa	61	71	132
Sweden	51	79	130
Japan	47	75	122
Italy	41	79	120
Brazil	65	55	120
UK	50	69	119
The Netherlands	43	75	118
France	51	66	117
Mexico	52	65	117
S. Korea	55	61	116
Germany	41	75	116
Australia	35	74	109
Canada	38	71	109
Thailand	48	50	98
Nigeria	49	49	98
Ireland	32	64	96
Kenya	39	47	86
India	35	36	71
UAE	18	48	66
Singapore	18	46	64
Saudi Arabia	18	43	61
China	14	45	59
Malaysia	28	27	55
Indonesia	11	44	55

Data Analyses Explained:

How We Defined Polarization Groups

To measure perceptions of societal polarization, we asked two questions, shown at the right. First, we measured the degree of perceived division on key societal issues within each country. Then, among only those who reported their country is very or extremely divided, we measured respondents' belief that their country can work through Based on their responses to these two questions, respondents were assigned to one of the three groups described here:

- **Not very divided *(code 0):*** respondents who say their country isn't very divided (POL_DEG/1-3).
- **Divided, not entrenched *(code 1)*:** respondents who see their country as very or extremely divided (POL_DEG/4-5), but believe these divisions can be overcome or are not an issue (POL_PROG/1, 6-8).
- **Polarized: our divisions are entrenched *(code 2):* :** respondents who see their country as very or extremely divided (POL_DEG/4-5), AND who also believe these divisions can not be overcome (POL_PROG/2-5).

These categories also defined a three-point polarization scale which was used as the outcome variable in a linear regression we used to identify the drivers of perceptions of polarization as detailed on the regression page.

Questions related to polarization
POL_DEG: Using the scale below, please indicate how divided on key societal issues you believe your country is today.
1. Not at all divided
2. A little divided
3. Somewhat divided
4. Very divided
5. Extremely divided
99. Don't know / Not sure
POL_PROG: How likely or unlikely do you think it is that your country will be able to work through or overcome its ideological divisions and lack of agreement on key issues and challenges?
1. Ideological divisions and a lack of agreement on key issues are not a problem in this country
2. It will **never happen**
3. Very unlikely
4. Unlikely
5. Neither likely nor unlikely
6. Likely
7. Very likely
8. It will **definitely happen**
99. Don't know / Not sure

2023 Edelman Trust Barometer Global Report

How We Calculated the Determinants of Polarization

We also wanted to know what leads to polarization. We found that distrust, identity, unfairness, and pessimism were significant drivers.

The factors depicted in the report are significant drivers of polarization as determined by a linear regression. Polarization refers to the 3-pt scale described on the polarization definition slide. The full model, depicted below, accounts for 17.71% of the observed variance in polarization scores.

Polarization= (0.2351)+(.3380)DistrustInGovernment+(.3068)LackOfSharedIdentity+(.2478)SystemInequality +(.1465)EconomicPessimism+(.1431)SocietalFears+(.1062)DistrustInMedia

The coefficient listed next to each factor indicates the increase in the polarization score associated with that factor being present, holding all other factors constant. This standardized value allowed us to rank the importance of each predictor variable and determine what factors drive polarization the most. All coefficients were significant at a p<.001 level.

Drivers	Coefficient
Distrust in government	.3380
Lack of shared identity	.3068
Systemic unfairness	.2478
Economic pessimism	.1465
Societal fears	.1431
Distrust in media	.1062
Constant	.2351

Drivers	Question text and scoring
Distrust in government	**TRU_INS.** [GOVERNMENT] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a 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; bottom 4 box =* ***distrust in government***
Lack of shared identity	**SOC_FAB_STR.** How true is each of the following statements regarding the current situation in your country? For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". *9-point scale; (r1,3,6,7), average score between 1-5* ***= lack of shared identity***
Systemic unfairness	**POP_MDC.** Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is "not at all true" and nine means it is "completely true". *9-point scale; (r2,3,18*,19*), average score of 6 or greater* ***= systemic unfairness*** **reverse scored*
Economic pessimism	**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? Select one response. *5-point scale, codes 4,5 =* ***economic pessimism***
Societal fears	**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 at a majority of items (r14, 27, 43, 30, 31, 32, 33) =* ***societal fears***
Distrust in media	**TRU_INS.** [MEDIA] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a 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; bottom 4 box =* ***distrust in media***

Data Analyses Explained:

How We Plotted the Institutional Competence and Ethics Scores

We define trust as the combination of competence and ethics. The report features a chart depicting how competent and ethical each of the institution are rated to be. Here's how we calculated each score**.**

The competence score (the x-axis of the plot): An institution's competence score is a net of the top 3 box (AGREE) minus the bottom 3 box (DISAGREE) responses to the question "To what extent do you agree with the following statement? *[INSTITUTION] in general is good at what it does*". The resulting net score was then subtracted by 50, which means that for an institution to qualify as competent, it would require a net difference of 51 points or more in its percentage of top 3-box ratings versus its bottom 3-box ratings. This ensures that an institution could not be considered competent unless there is a majority who rate it as such.

The net ethical score (the y-axis of the plot): The ethics dimension is defined by four separate items. For each item, a net score was calculated by taking the top 5 box percentage representing a positive ethical perception minus the bottom 5 box percentage representing a negative ethical perception. The y-axis value is an average across those 4 net scores. Scores higher than zero indicate an institution that is perceived as ethical.

Respondents were asked:

In thinking about why you do or do not trust *[INSTITUTION]*, please specify where you think they fall on the scale between the two opposing descriptions. *(Please use the slider to indicate where you think [INSTITUTION] falls between the two extreme end points of each scale.)*

Dimension	Ethical Perception	Unethical Perception
Purpose-Driven	Highly effective agents of positive change	Completely ineffective agents of positive change
Honest	Honest and fair	Corrupt and biased
Vision	Have a vision for the future that I believe in	Do not have a vision for the future that I believe in
Fairness	Serve the interests of everyone equally and fairly	Serve the interests of only certain groups of people

2023 Edelman Trust Barometer: Analyses

How We Calculated Belief-Driven Buyers

In the June 2022 Edelman Trust Barometer Special Report: The New Cascade of Influence, respondents were asked a series of questions regarding the role their values, opinions about social issues, and political beliefs played in their purchasing decisions. The Belief-Driven Buyer (BDB) scale was created by averaging respondents' answers to the seven 9-pt agree/disagree scale items, shown in the table to the right.

- Non-belief-driven buyers were those that scored between 1 – 4.99 on the BDB scale, meaning on average they disagreed with these statements.
- Respondents who scored between 5.00 – 9.00 on the BDB scale were classified as belief-driven buyers, meaning on average they saw themselves reflected at least to some extent in these statements

Respondents were asked:

Please indicate how much you agree or disagree with the following statements

1.	Even if a company makes the product that I like most, I will not buy it if I disagree with the company's stand on important social issues
2.	If a brand offers the best price on a product, I will buy it even if I disagree with the company's stand on controversial social or political issues
3.	I have bought a brand for the first time for the sole reason that I appreciated its position on a controversial societal or political issue
4.	I have stopped buying one brand and started buying another because I liked the politics of one more than the other
5.	I have strong opinions about many societal and political issues. The brands I choose to buy and not buy are one important way I express those opinions.
6.	I have stopped buying a brand solely because it remained silent on a controversial societal or political issue that I believed it had an obligation to publicly address

Full question text

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Personal Economic and Societal Fears

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”.

Shortened	Full
Job loss (net)	Automation and/or other innovations taking your job away Your job being moved to other countries where workers are paid less Cheaper foreign competitors driving companies like yours out of business Not having the training and skills necessary to get a good paying job International conflicts about trade policies and tariffs hurting the company you work for Losing your job as a result of a looming recession Permanent jobs with benefits being replaced by freelance, gig-economy or short-term jobs that do not offer benefits
Inflation	Your pay increases not keeping up with the inflation rate causing you to lose ground financially
Climate change	Climate change leading to drought, rising sea levels and other natural disasters
Nuclear war	International conflicts escalating into nuclear war
Food shortages	Food shortages leading to hoarding, riots, and hunger
Energy shortages	An energy shortage that makes it difficult for you to heat your home, power your appliances, or keep your car fueled

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Polarization Fears

NAT_POL_CONS. What do you see as the likely consequences of these divisions within your country if they are not addressed?

Shortened	Full
Worsening prejudice and discrimination	The worsening of prejudice and discrimination
Slower economic development	Our rate of economic development will slow, and we will not be well positioned for future prosperity
Violence in the streets	Violence in the streets
Inability to address societal challenges	An inability to adequately address our societal challenges
I will suffer financially	I will suffer financially
End of our democracy	The end of our democracy
Government gridlock	Paralysis of the government and an inability to get any legislation passed
Lack of cooperation with authorities	Increased lack of cooperation with the recommendations and guidance of national authorities
Disruptions in the workplace	Disruptions in the workplace due to disputes between groups of employees
Loss of our country's influence	Our country will lose its influence in the world
Greater personal safety risk	My personal safety will be at greater risk
Damaged personal relationships	My relationship with some of my friends and family members will be further damaged
Lost career opportunities	I will lose advancement opportunities at work

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Business Engagement on Societal Issues

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.

Shortened	Full
Climate change	Addressing climate change
Economic inequality	Redressing economic inequality, narrowing the opportunity gaps between the richest and poorest in this country, and lifting people out of poverty
Energy shortages	Addressing global energy shortages and increasing energy costs
Healthcare access	Increasing access to good quality healthcare
Trustworthy information	Controlling the malicious spreading of misleading and false information and ensuring the availability of trustworthy information
Workforce reskilling	Doing the workforce reskilling and retraining necessary to keep people employable whose jobs are being eliminated or greatly altered by automation and artificial intelligence

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Expectations for CEOs on Societal Issues

CEO_ISS_EXP. For each of the following issues, please indicate what you expect CEOs to do.

Shortened	Full
Treatment of workers	Treatment of workers
Climate change	Climate change
Discrimination	Discrimination and the treatment of minority groups
Wealth gap	How to address the gap between the rich and poor
Immigration	Immigration, refugees, and guest workers

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Business Can Avoid Being Seen As Politically Motivated

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?

Shortened	Full
Be a trustworthy information source	Be a trustworthy information source regarding an issue but don't take sides
Base actions on science	Show that their actions are based on generally agreed upon facts or well-established scientific evidence
Don't align with only one political party	Show how their engagement on societal issues over time does not consistently align with one political party or another
Act on same values over time	Tie their actions to a set of values that they have consistently supported over time
Link actions to staying competitive	Link their actions to the needs of their business and their ability to stay competitive in the marketplace
Have politically representative leadership	Have a leadership team that spans the political continuum from liberal to conservative
Link actions to employee demands	Link their actions to demands being made on them by their employees
Link actions to customer demands	Link their actions to demands being made on them by their customers
Base actions on country laws	Show that their actions are required by the laws in the countries where they do business

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

CEO Obligations

CEO_PLAY_BK. How obligated do you believe CEOs are to take the following actions?

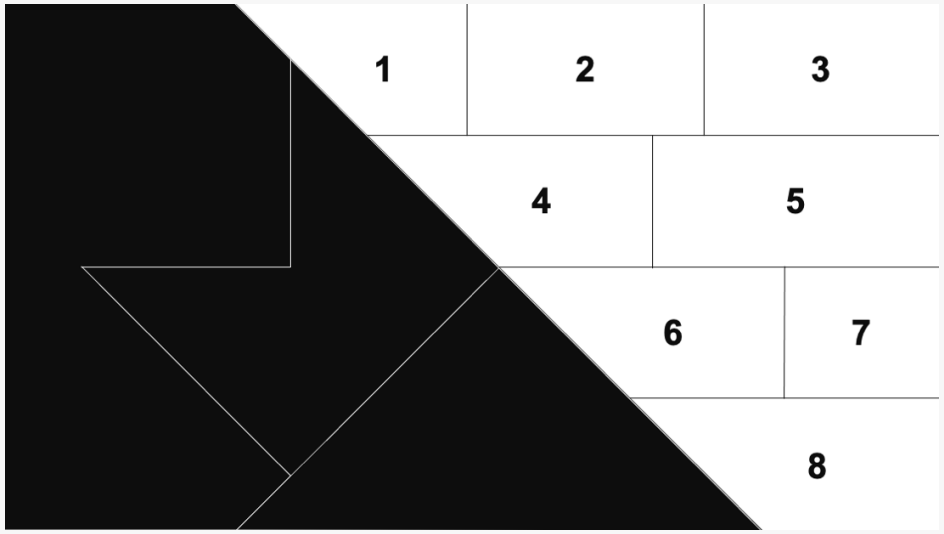
Shortened	Full
Pay a fair wage	Pay a fair wage to all employees and work to ensure that their suppliers are doing the same
Ensure their home community is safe and thriving	Work to ensure that the community in which their organization is headquartered is safe, strong, and thriving
Pay fair corporate taxes	Make sure that their organization pays its fair share of local taxes to help fund government programs meant to improve the education system, increase access to good quality healthcare, expand public services, and provide job retraining to displaced workers
Retrain employees	Retrain workers whose jobs are eliminated due to technology and automation
Defend facts and expose questionable science used to justify bad social policy	Defend facts and expose questionable or fraudulent science being used to justify bad law or social policy
Pull advertising money from platforms that spread misinformation	Pull the organization's advertising money out of media platforms and news outlets that do not adequately control the spread of misinformation

2023 Edelman Trust Barometer:
Full Text For Answer Choices Abbreviated

Business Strengthening the Social Fabric

POL_SOL. How important do you feel each of the following would be to increasing civility among people in your country and strengthening the social fabric that binds people together?

Shortened	Full
Support politicians and media that build consensus and cooperation (avg)	Companies using their power and influence to get politicians to engage in consensus building and cooperation Companies spending their advertising money on media channels and news programs that emphasize cooperation, moderation, and consensus building, and not on those which worsen divisions among different groups of people and support extreme positions



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Slide 4 Four Forces That Lead To Polarization

Economic Anxieties: *Recession of stock market on tablet computer: Leung Cho Pan via AdobeStock*

Institutional Imbalance: *Neon night city Shibuya crossing in Tokyo: Scrudje via AdobeStock*

Mass-Class Divide: *Activists' Groups, The Poor People's Campaign And Low-Wage Workers' Assembly March On Wall Street: Michael M. Santiago via Getty Images*

The Battle for Truth: *Woman reading news on smartphone and laptop in Thailand: Oatawa via iStock/ Getty Images*

Slide 5 Facing Economic Fears Without a Trust Safety Net
Woman Checking Her Bill At The Supermarket in Serbia: LordHenriVoton via Getty Images

Slide 15 Distrust Breeds Polarization
Members of the Korean Confederation of Trade Unions (KCTU) shout slogans during a protest in Uiwang, South Korea: SeongJoon Cho/Bloomberg via Getty Images

Slide 25 Great Expectations, Heightened Risk for Business
Activists of Trinamool Congress in Kolkata, India display banners and slogans against government policies Dibyangshu sarkar / AFP via Getty Images

Slide 31 Navigating a Polarized World
Agricultural scientist working in greenhouse: Mayur Kakade via Getty Images

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