

# 2023 Edelman Trust Barometer

China Report



# 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	
<b>China</b> 	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

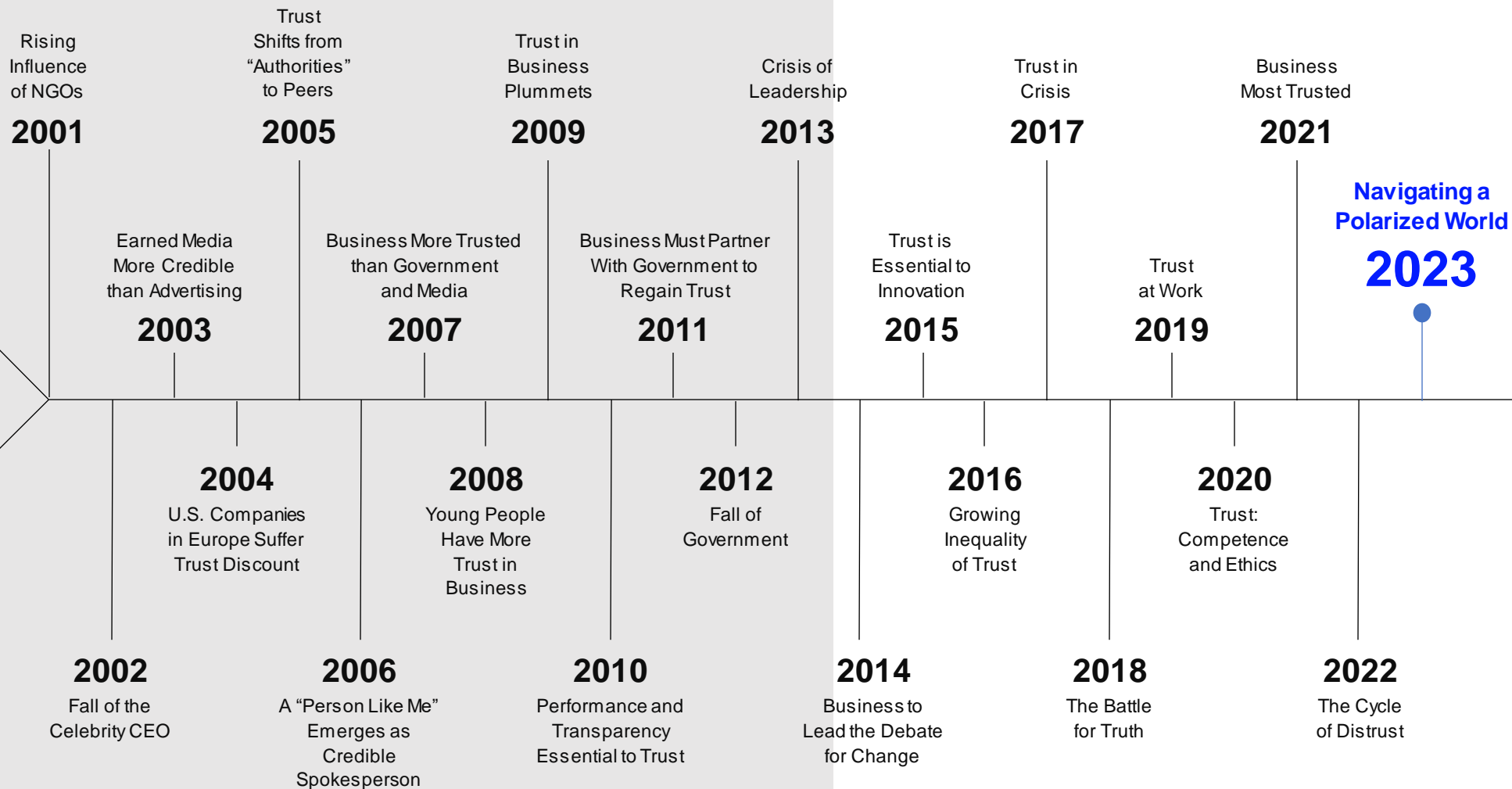


All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level

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



# 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; government is viewed as unethical and incompetent. Business is under pressure to step into the void left by government.

## 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



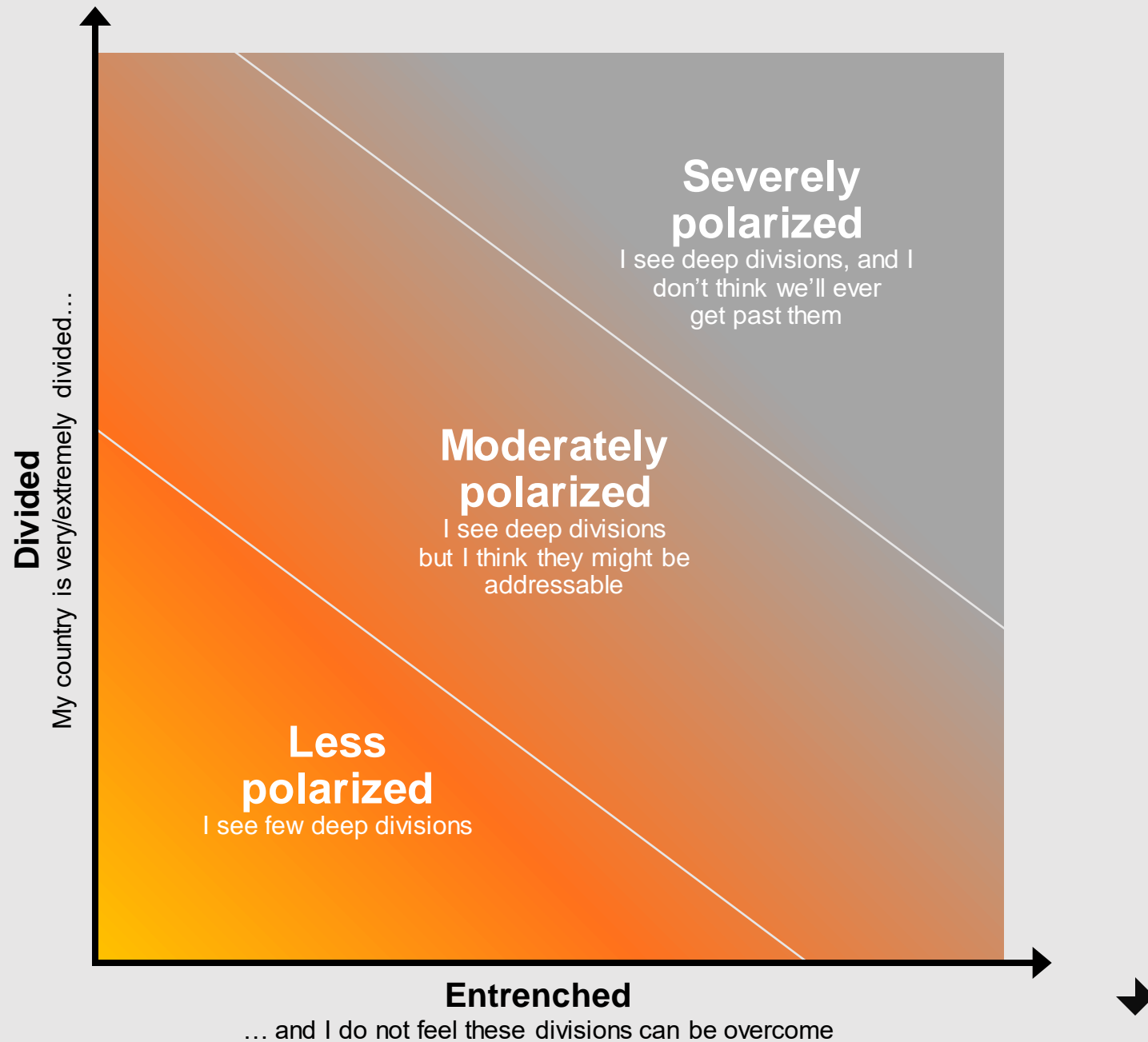
A shared media environment has given way to echo chambers, making it harder to collaboratively solve problems. Media is not trusted, with especially low trust in social media.



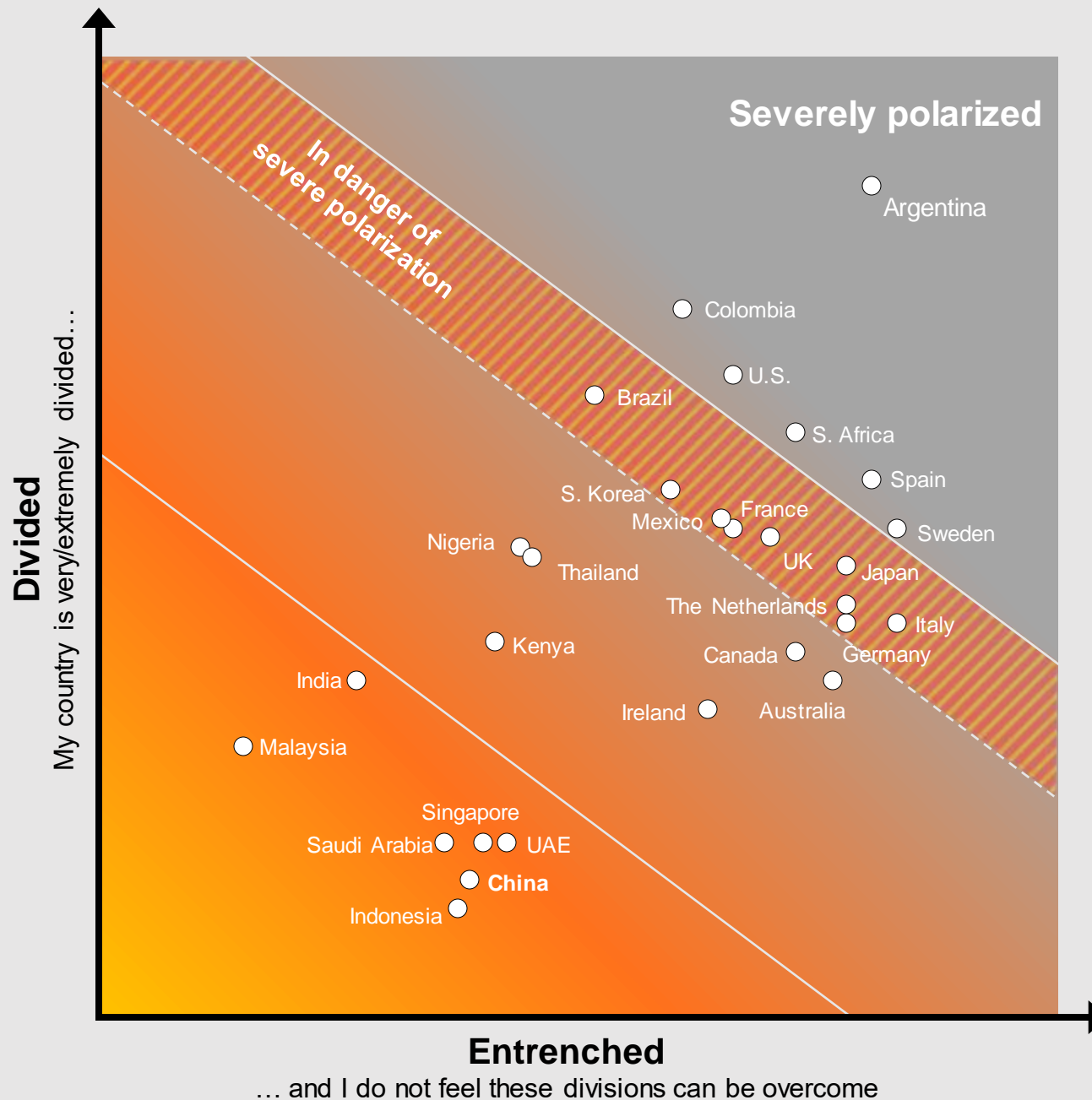
# Distrust Breeds Polarization



## Polarization Most Severe When Deep Divisions Become Entrenched

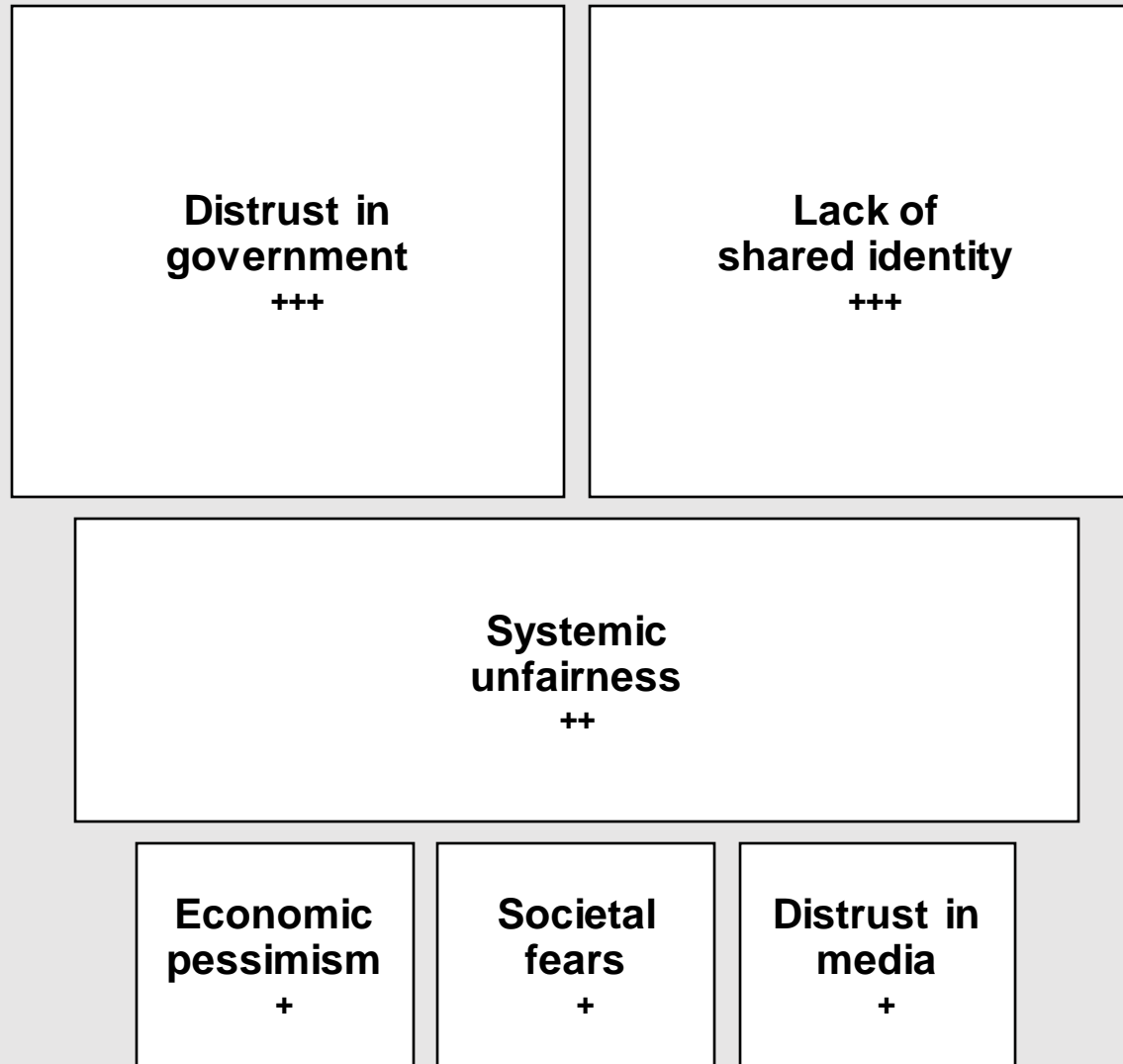


# Six Countries Severely Polarized



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





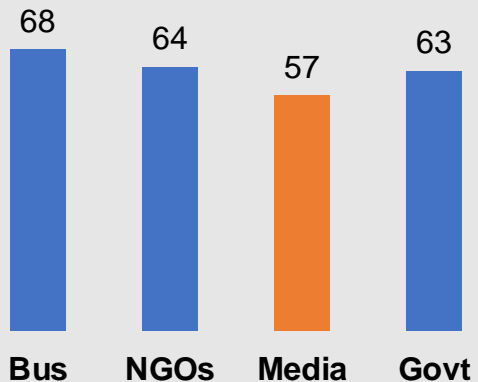
# Both Cause and Consequence: Polarization Itself Leads to Further Distrust

Percent trust among those who say

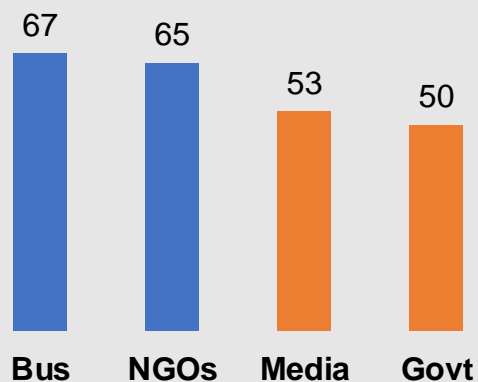


My country is ...

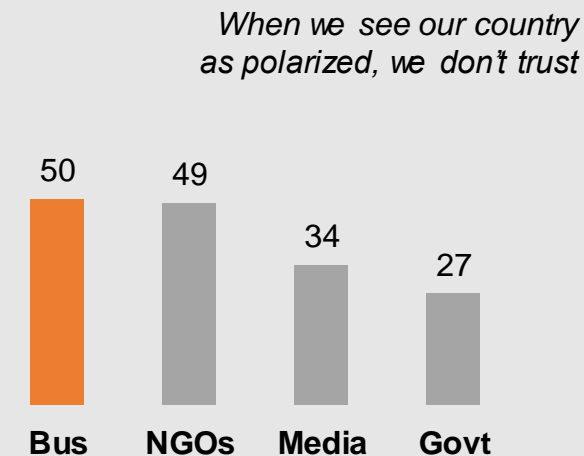
**... not very divided**



**... divided, not entrenched**



**... polarized: divisions are entrenched**



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



# Best Societal Outcomes When Government and Business Work Together

Percent who say

GLOBAL 25

## 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**

41

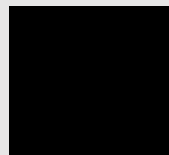


**4x**

more likely to yield optimal results from partnership than business alone

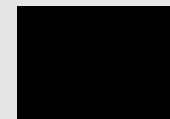
Both working **independently**

21



**Government only** working alone

16



**Business only** working alone

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.



# Polarization Worsens Fears

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

GLOBAL 25 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**

*Economic consequence*

**#3**

**Violence in the streets**

**#4**

**Inability to address societal challenges**

**#5**

**I will suffer financially**

*Economic consequence*



# Trust Is the Safety Net Facing Economic Fears



# The Only Country Keeps Economic Optimism

Percent who say

GLOBAL 24



Significant change

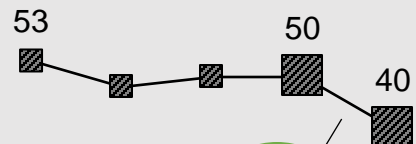
24 of 28 countries at all-time lows

Developed countries

## My family and I will be better off in five years

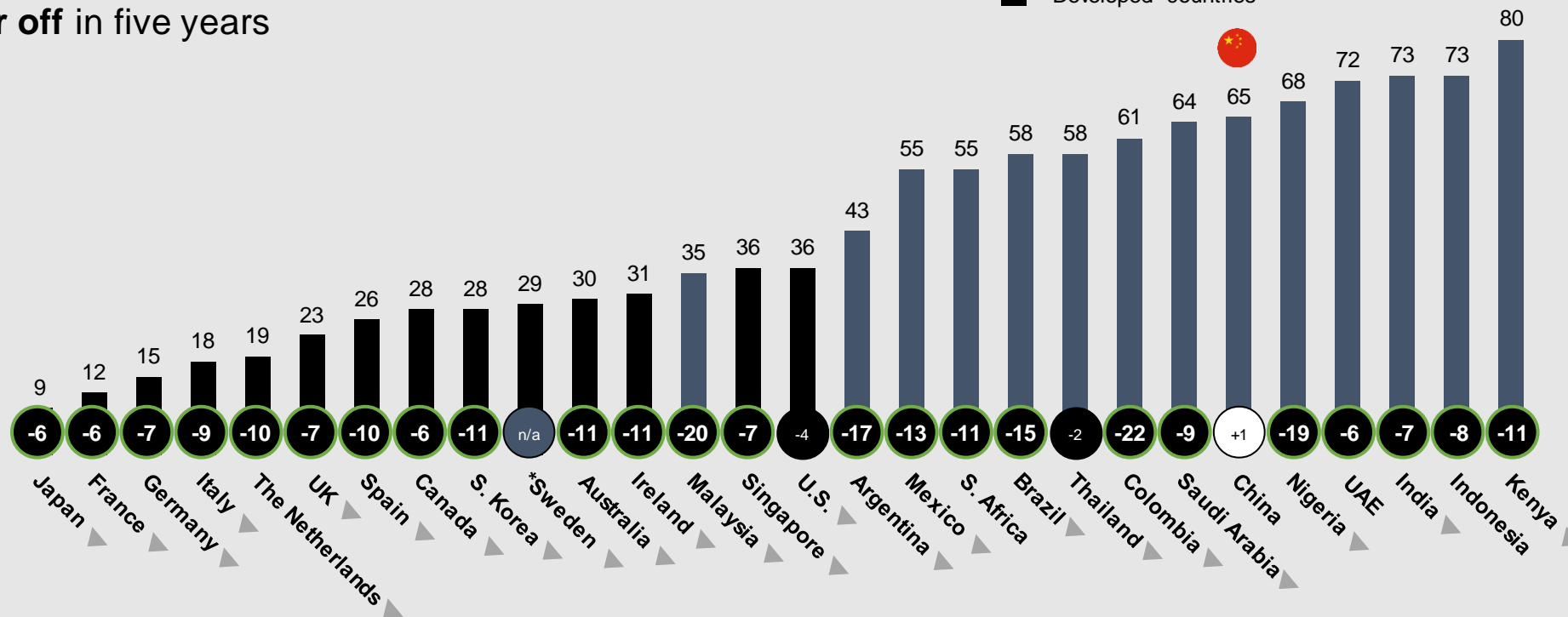
2019

2023



**-10 pts**

Change, 2022 to 2023

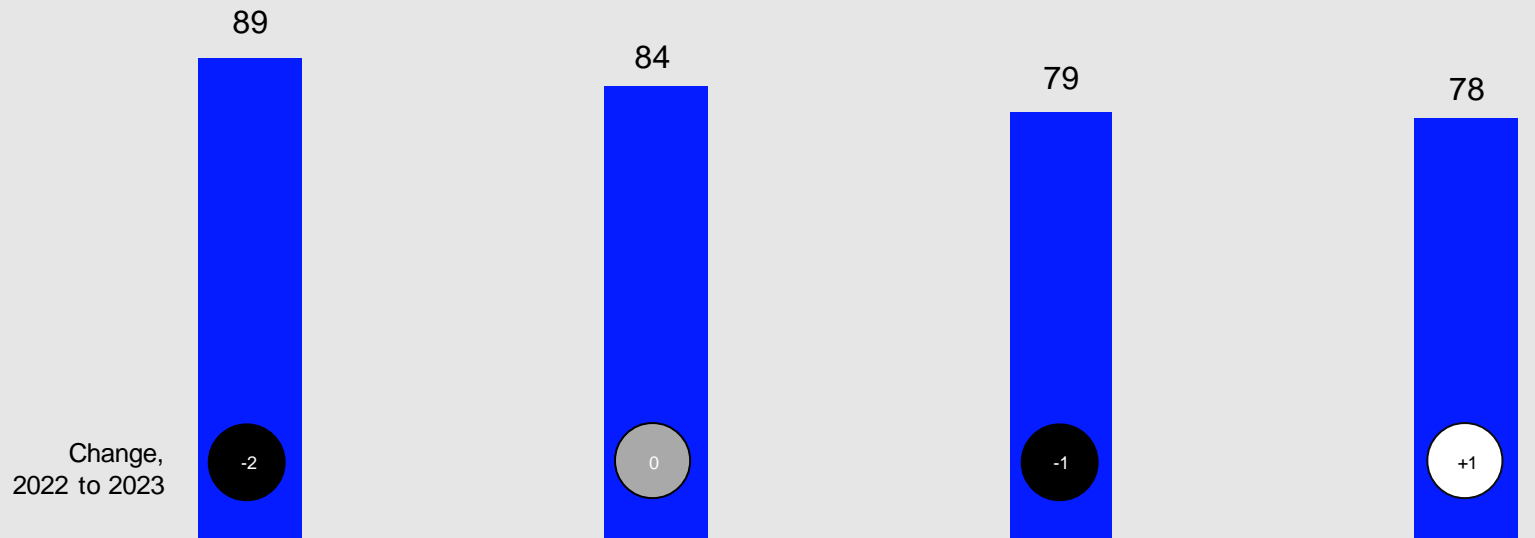
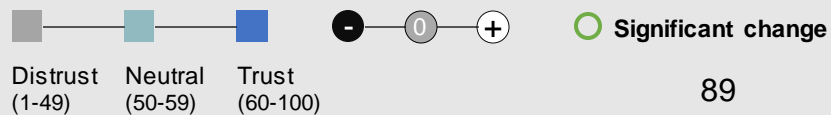


2023 Edelman Trust Barometer. CNG\_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. General population, 24-mkt avg. \*Sweden is not included in the global average. Year-over-year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



# In China, All Institutions Trusted

Percent trust, in China



**Least-trusting countries for each institution**

Institution	Country	Trust (%)
Government	Japan	33
	S. Africa	22
	Argentina	20
Business	Spain	49
	Japan	47
	S. Korea	38
Media	UK	37
	Japan	34
	S. Korea	27
NGOs	*Sweden	44
	Germany	41
	Japan	38

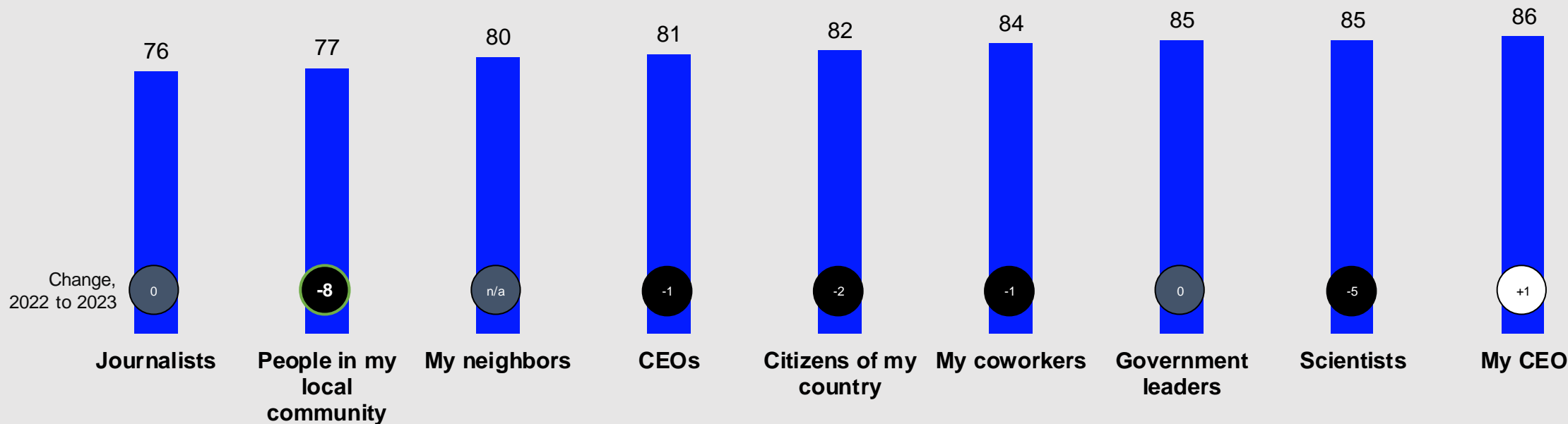
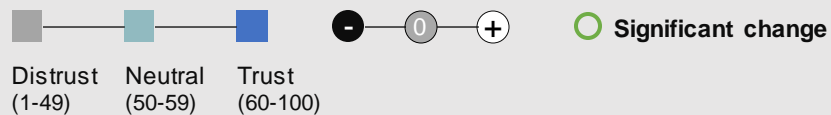


2023 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, China. Year-over-year changes were tested for significance using a t-test set at the 99%+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



# In China, All Leaders Trusted

Percent trust, in China

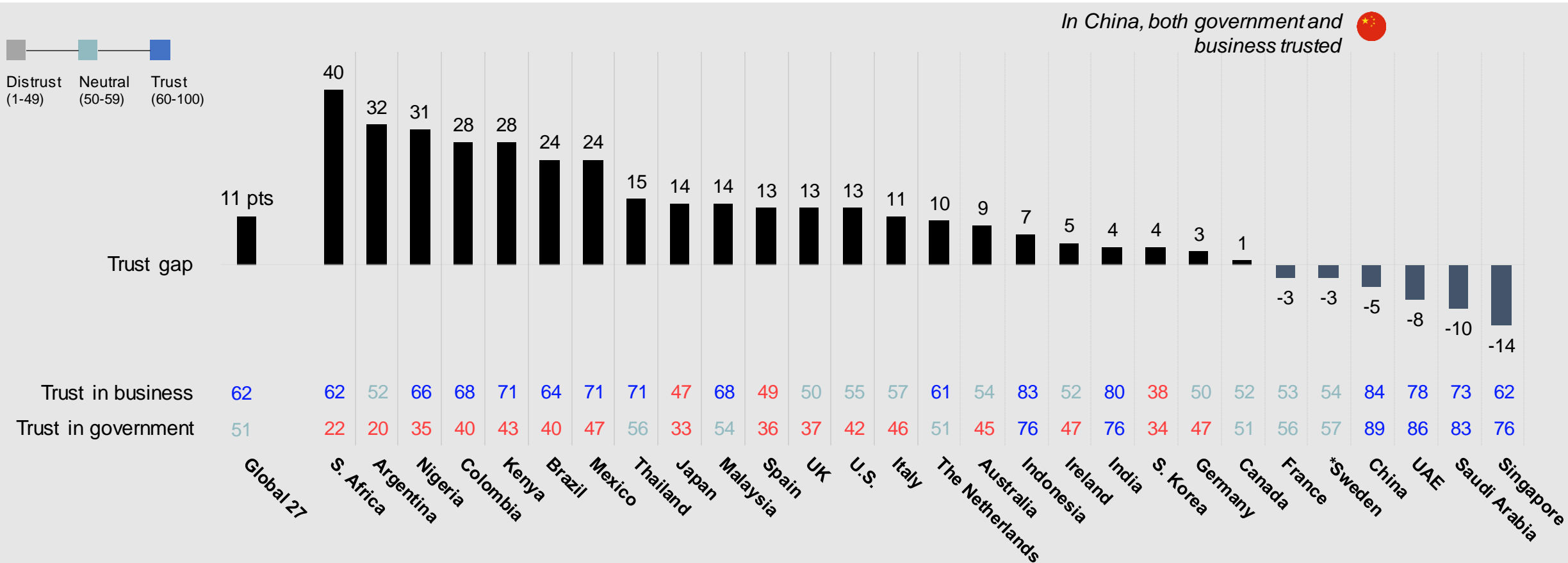


2023 Edelman Trust Barometer. TRU\_PEP. Below is a list of groups of people. For each one, please indicate how much you trust that group of people to do what is right. 9-point scale; top 4 box, trust. Some attributes asked of half of the sample. General population, China. "My coworkers" and "my CEO" 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.



# Smallest Gap Among High Trust Markets

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, 27-mkt avg. \*Sweden is not included in the global average.

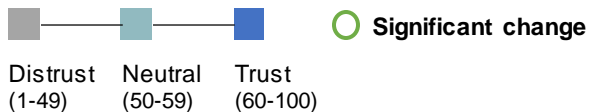




# Trust Index: Trust Stable Amid Economic Headwinds

## Trust Index

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



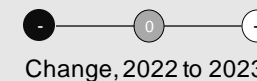
**2023 Edelman Trust Barometer.** The Trust Index is the average percent trust in NGOs, business, government and media. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 27-mkt avg. \*Sweden is not included in the global average.

### 2022 General population

56	Global 27
83	China
76	UAE
75	Indonesia
74	India
72	Saudi Arabia
66	Malaysia
66	Singapore
66	Thailand
60	Kenya
59	Mexico
57	The Netherlands
56	Nigeria
54	Canada
53	Australia
53	Italy
51	Brazil
51	Ireland
50	France
48	Colombia
48	S. Africa
46	Germany
45	Argentina
45	Spain
44	UK
43	U.S.
42	S. Korea
40	Japan

### 2023 General population

56	Global 27
83	China
75	Indonesia
74	UAE
73	India
71	Saudi Arabia
66	Singapore
66	Thailand
63	Kenya
62	Malaysia
61	Mexico
56	Nigeria
54	The Netherlands
53	Brazil
52	Canada
51	Colombia
51	France
50	Italy
48	Australia
48	Ireland
48	U.S.
47	S. Africa
46	Germany
44	Spain
43	UK
42	Argentina
38	Japan
36	S. Korea



#### Biggest gainers:

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

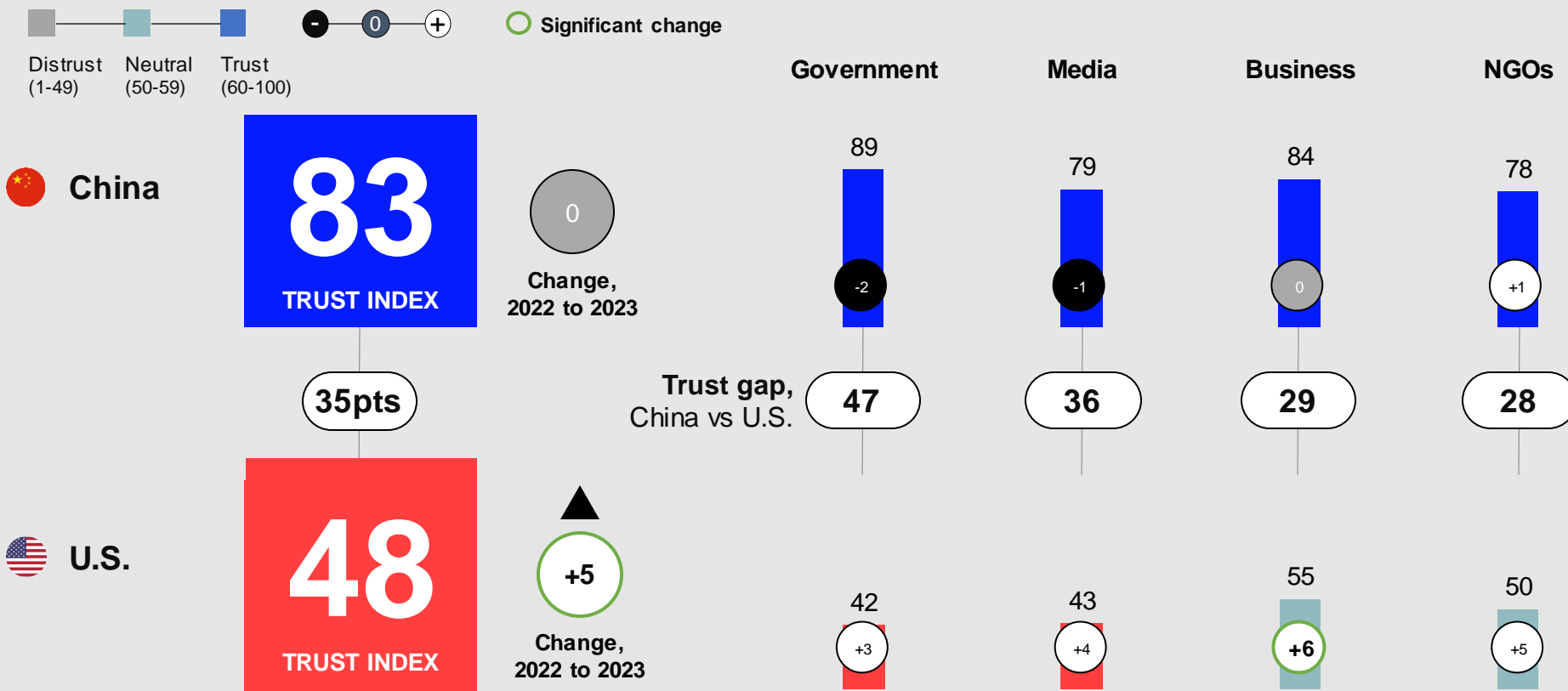
#### Biggest losers:

S. Korea	-6
Australia	-5
Malaysia	-4



# China- U.S. Trust Divergence Remains Large

Percent trust



## DIVERGING TRUST IN BRAND CHINA VS BRAND U.S. ABROAD

Percent trust, 26-market averages\*

**32%** trust companies headquartered in China (+0pts)

**55%** trust companies headquartered in the U.S. (+0pts)

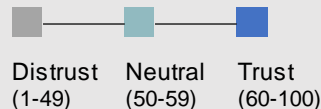
**2023 Edelman Trust Barometer.** The Trust Index is the average percent trust in NGOs, business, government and media. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, China and the U.S. 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. \*does not include home country rating. 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

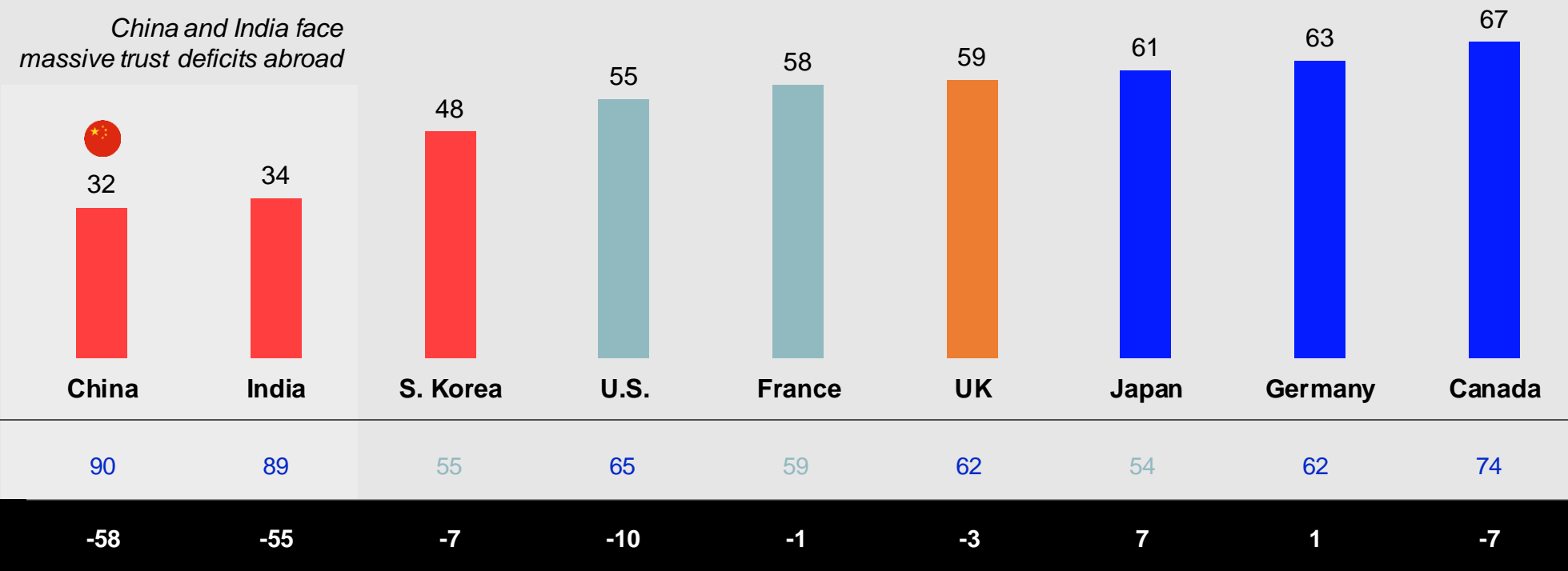


*China and India face massive trust deficits abroad*

**Foreign trust** in companies headquartered in each market

**Domestic trust** in companies headquartered in each market

**Trust gap, foreign vs domestic**



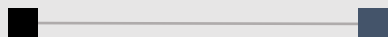
2023 Edelman Trust Barometer. TRU\_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample.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



# Divisive Forces Exploit and Intensify Our Differences

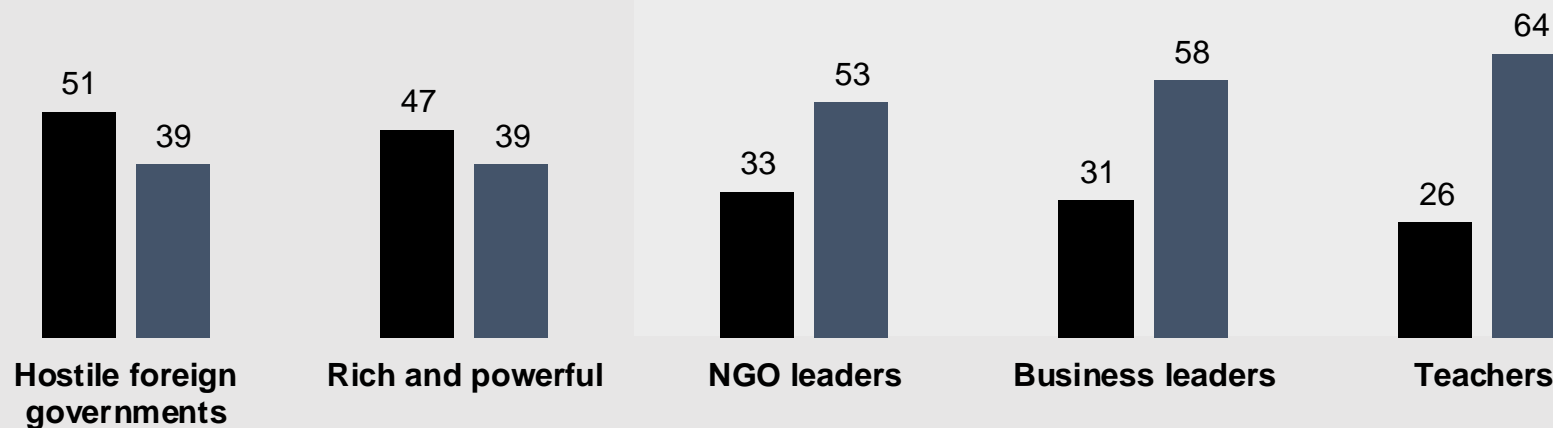
Percent who say, in China

These groups are



**a dividing force**  
that pulls people apart

**a unifying force**  
that brings people together



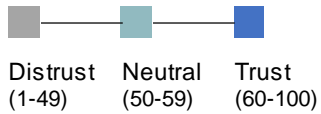
2023 Edelman Trust Barometer. PROB\_PLP. Ideological differences will always exist among people, but there are some groups of people that are perhaps making things worse than they might otherwise be by fueling divisions and fomenting a lack of civility between people who hold different views. In contrast, 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 1-5, a dividing source in society; codes 7-11, a unifying source in society. Some attributes asked of half of the sample. General population, China. "Government leaders" and "Journalists" not collected in China.



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

## Trust Index

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



**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, 27-mkt avg., 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.

### 2023 High income (top 25%)

64	Global 27
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	France
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 27
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	France
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 21 of 28 countries*

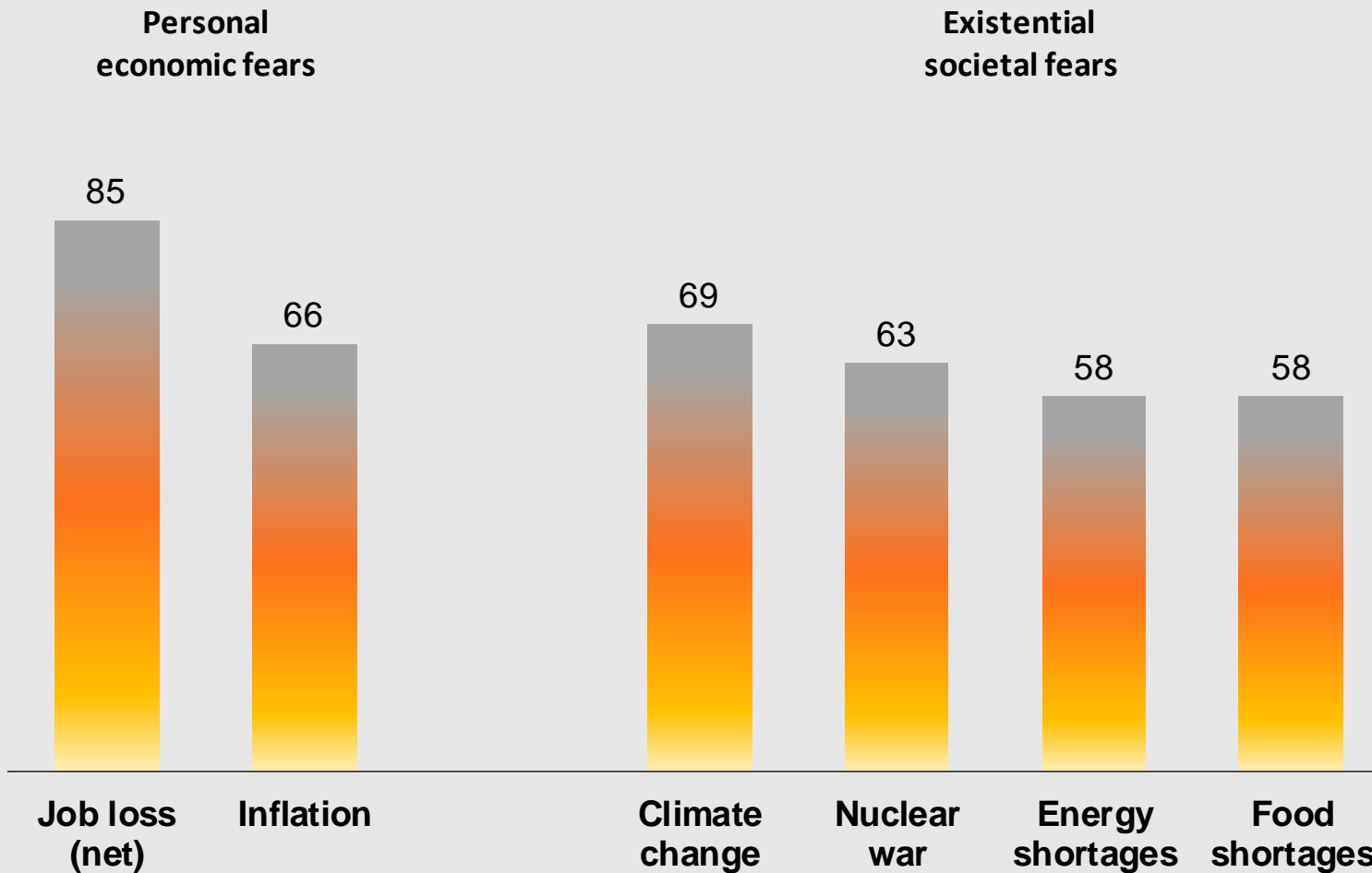
### Greatest income-based trust inequality in:

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



# Personal Anxieties On Par With Existential Fears

Percent who worry about each, in China



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, China. 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.



# 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 China

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

**Help them**  
if they were in need

**32%**

Be willing to live in  
**the same neighborhood**

**19%**

Be willing to have them  
**as a coworker**

**20%**



# Great Expectations, Heightened Risk for Business





# In China, Seven-Point Increase in Business Ethics Since 2020

(Competence score, net ethical score)



Change, 2020 to 2023

## Competence score

## Net ethical score

Business

NGOs

Business

NGOs

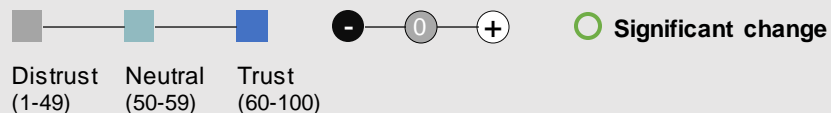


2023 Edelman Trust Barometer. The ethical scores are averages of nets based on [INS]\_PER\_DIM/1 -4. The competence score is a net based on TRU\_3D\_[INS]/1. General population, China. For full details regarding how this data was calculated and plotted, please see the Technical Appendix. Government and Media not collected in China.



# In China, My Employer Trusted

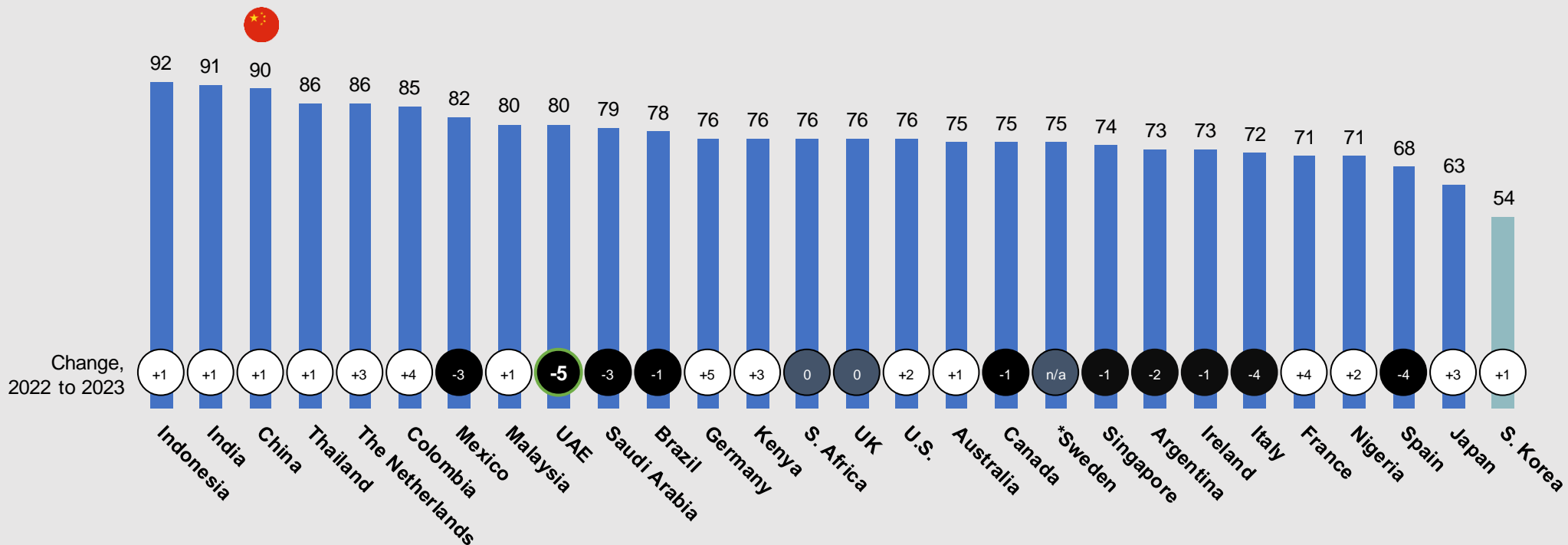
Percent trust



China



Government	89
Business	84
Media	79
NGOs	78



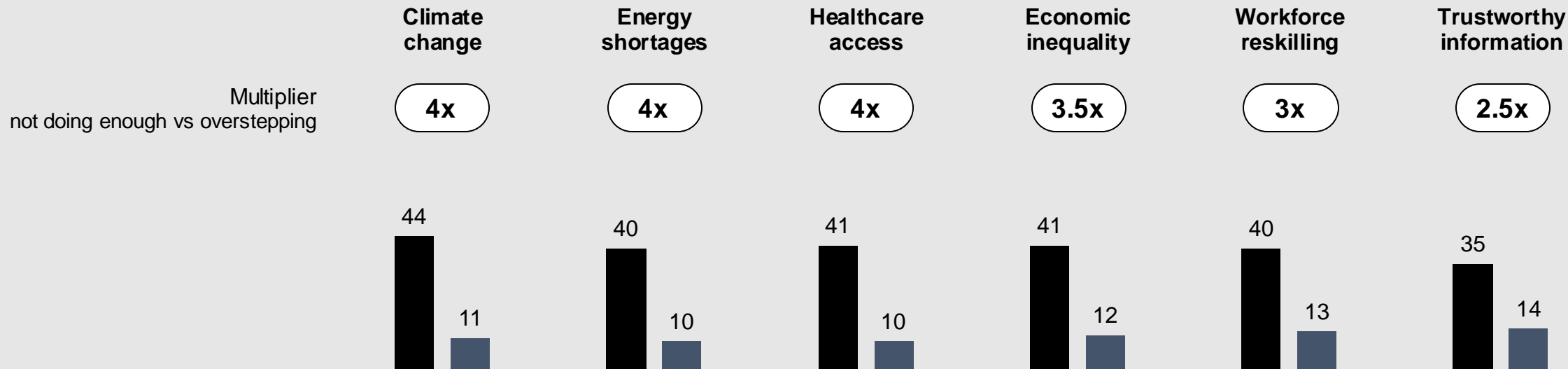
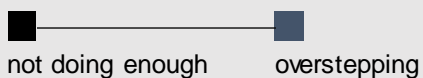
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# Want More Societal Engagement from Business, Not Less

Percent who say, in China

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, China. The multipliers are rounded to the nearest .5.



# Navigating a Polarized World



# Hold Divisive Forces Accountable

Percent who say, in China

I believe CEOs are obligated to ...

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

82%

Companies could strengthen the social fabric if they

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

66%



# In China, CEOs Most Expected To Act on Employees, Climate, and Discrimination

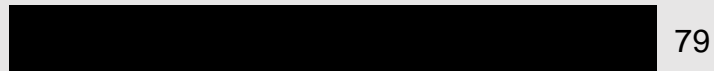
Percent who say, in China

I expect CEOs to take a public stand on this issue:

Climate change



Discrimination



Treatment of employees



Wealth gap



Immigration



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

Percent who say, in China

CEOs are obligated to ...

Pay a fair wage



Ensure their home community is safe and thriving



Retrain employees



Pay fair corporate taxes



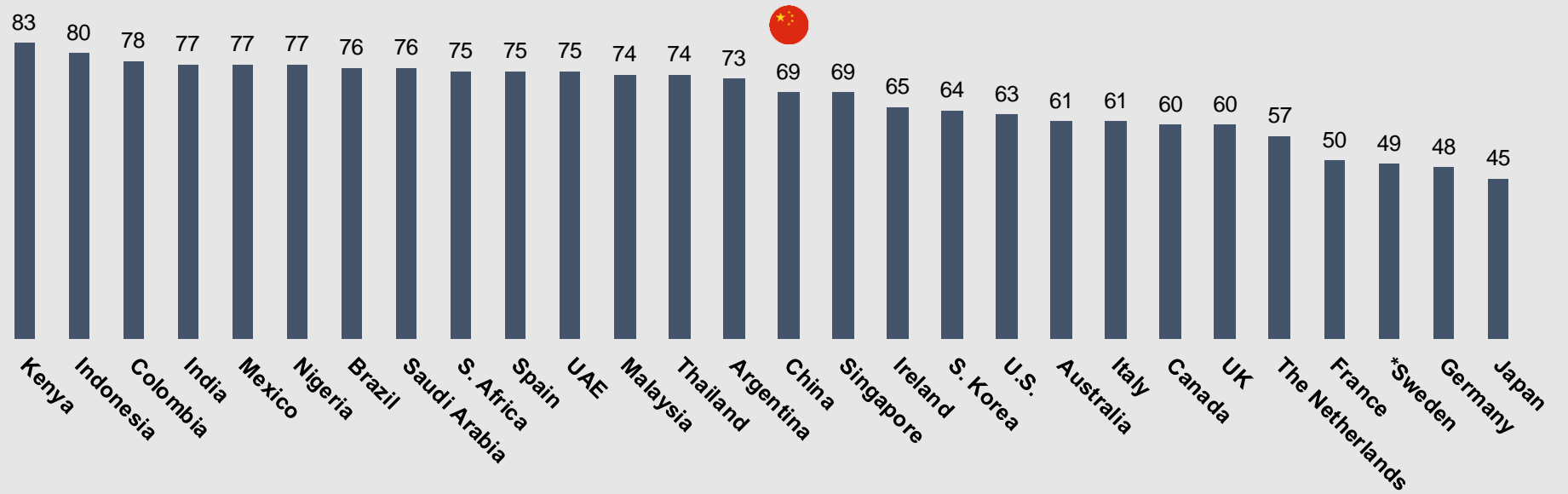
# Use the Power of Brands To Create a Shared Identity

Percent who say

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

GLOBAL 27

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, 27-mkt avg. \*Sweden is not included in the global average.





# In China, Consumers and Employees Pressure Business to Stand Up for Them

Percent who say, in China

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

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

89%

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)

Among employees

72%

- 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, China. 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. China. 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.



# Navigating a Polarized World

## 1

### **Business must continue to lead**

As the most trusted institution, business holds the mantle of greater expectation and responsibility. 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. Build consensus and collaborate on policies and standards to deliver results that push us toward a more just, secure, and thriving society.

## 3

### **Restore economic optimism**

A grim economic view is both a driver and outcome of polarization. Invest in fair compensation, training, and local communities to address the mass-class divide and the cycle of polarization.

## 4

### **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.



**For additional information about TRUST,  
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