

# 2023 Edelman Trust Barometer

Japan Report



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

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

\*\*The sample size varies by country from 1,082 to 1,500.

27-market global data margin of error: General population +/- 0.6 percentage points (n=31,171)

Country-specific data margin of error: General population +/- 2.5 to 3.0 percentage points (varies by country based on sample size, n=1,082 to n=1,500)

### Global averages

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

**GLOBAL 27**

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

**GLOBAL 25** Excludes China and Thailand

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

### Statistical significance

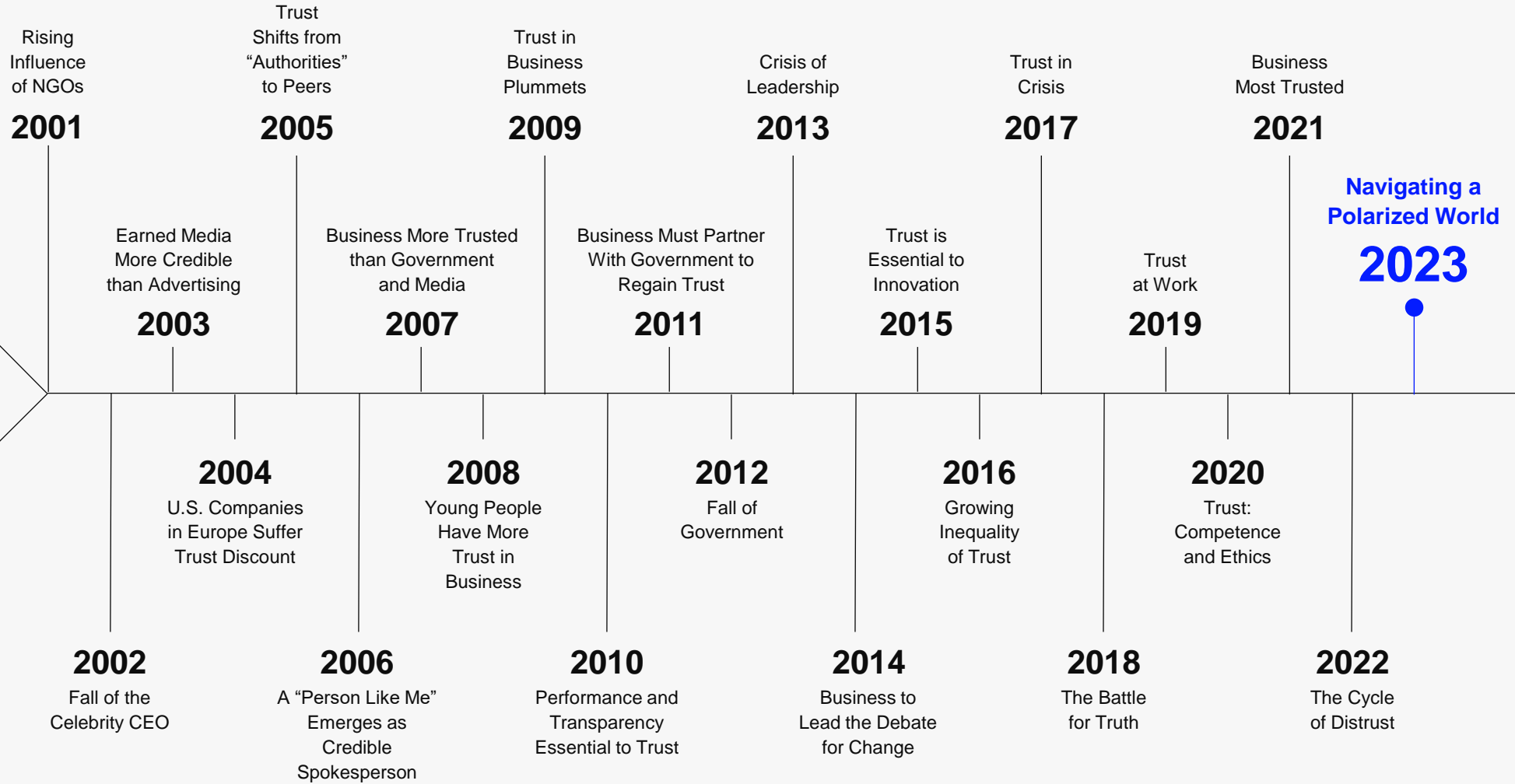
● — 0 — ● +    ○ Significant change

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



# 23 Years of Trust



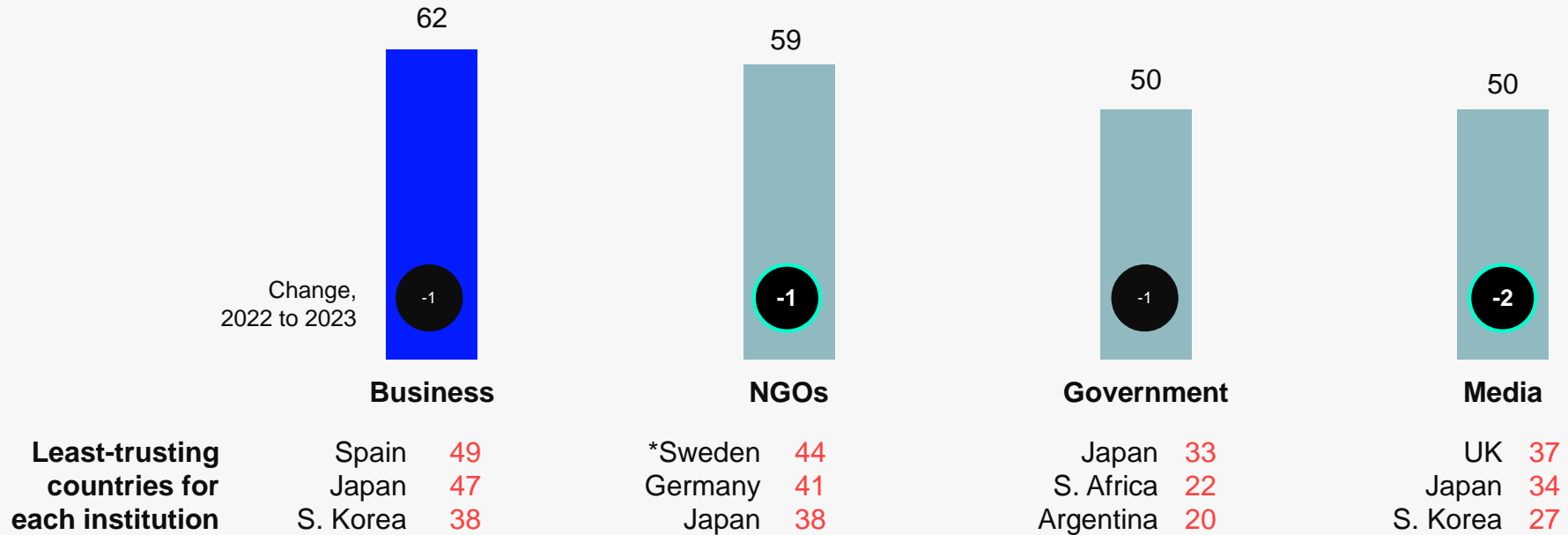
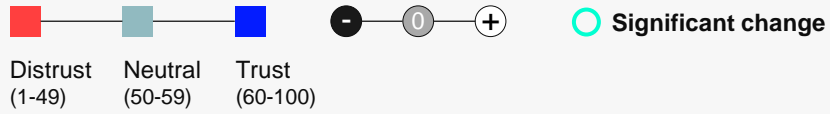
# Status of Trust



# Globally, Business Only Trusted Institution

Percent trust

GLOBAL 26 excludes France



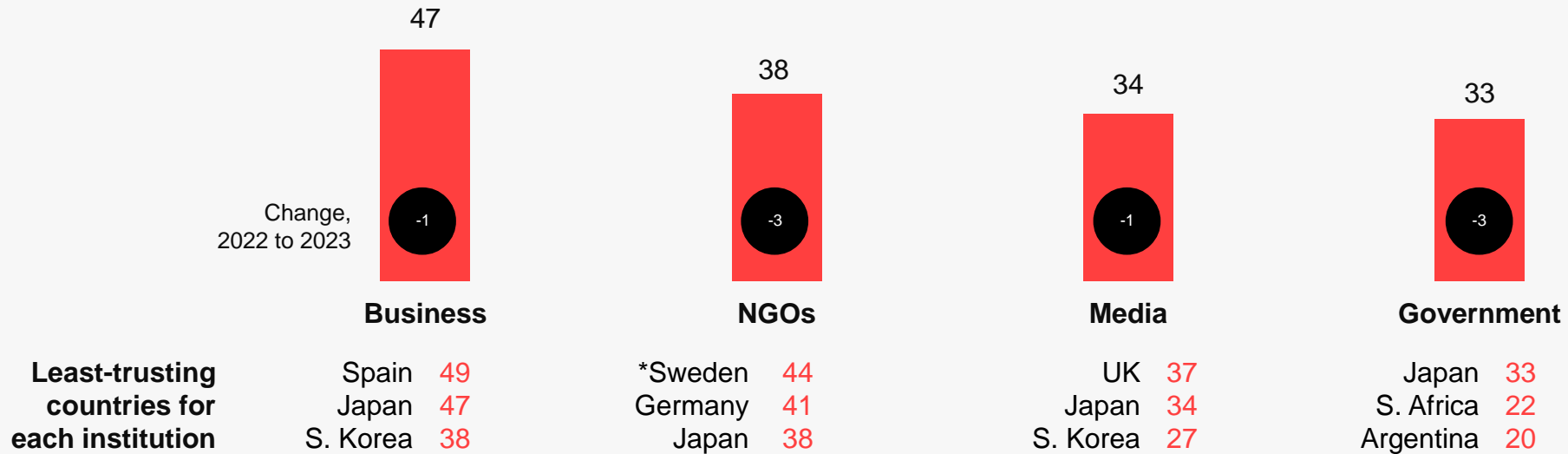
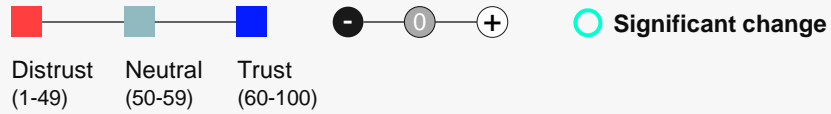
2023 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, 26-mkt avg. \*Sweden is not included in the global average. Year-over-year changes were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

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



# In Japan, No Institution Trusted

Percent trust, in Japan

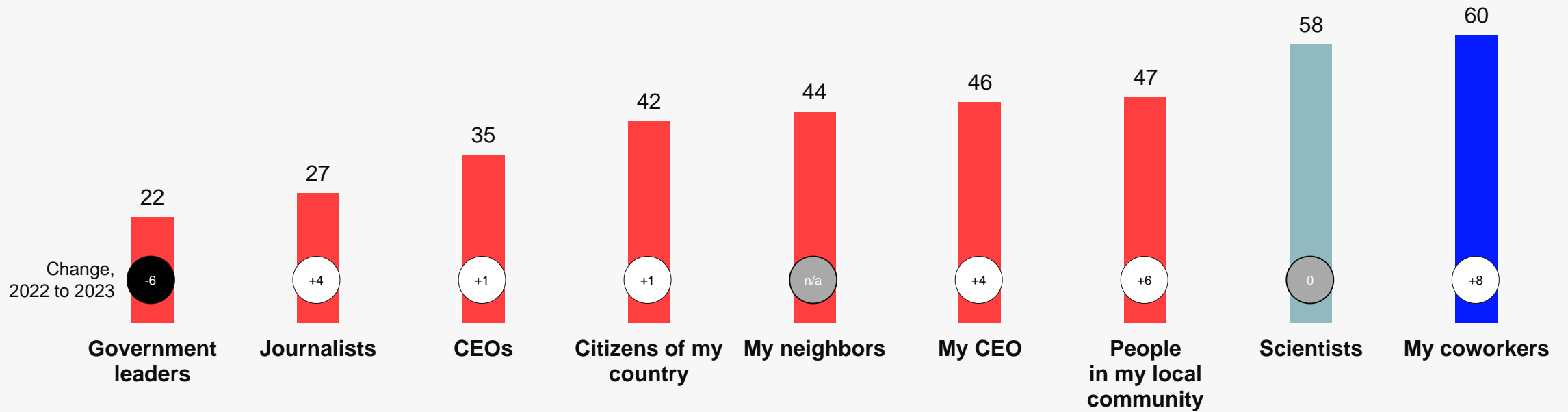
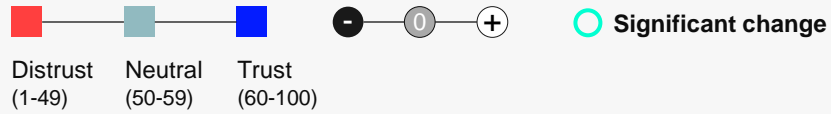


2023 Edelman Trust Barometer. TRU\_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right. 9-point scale; top 4 box, trust. General population, Japan. Year-over-year changes were tested for significance using a t-test set at the 99%+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



# Institutional Leaders Distrusted

Percent trust, in Japan



● 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, Japan. "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.

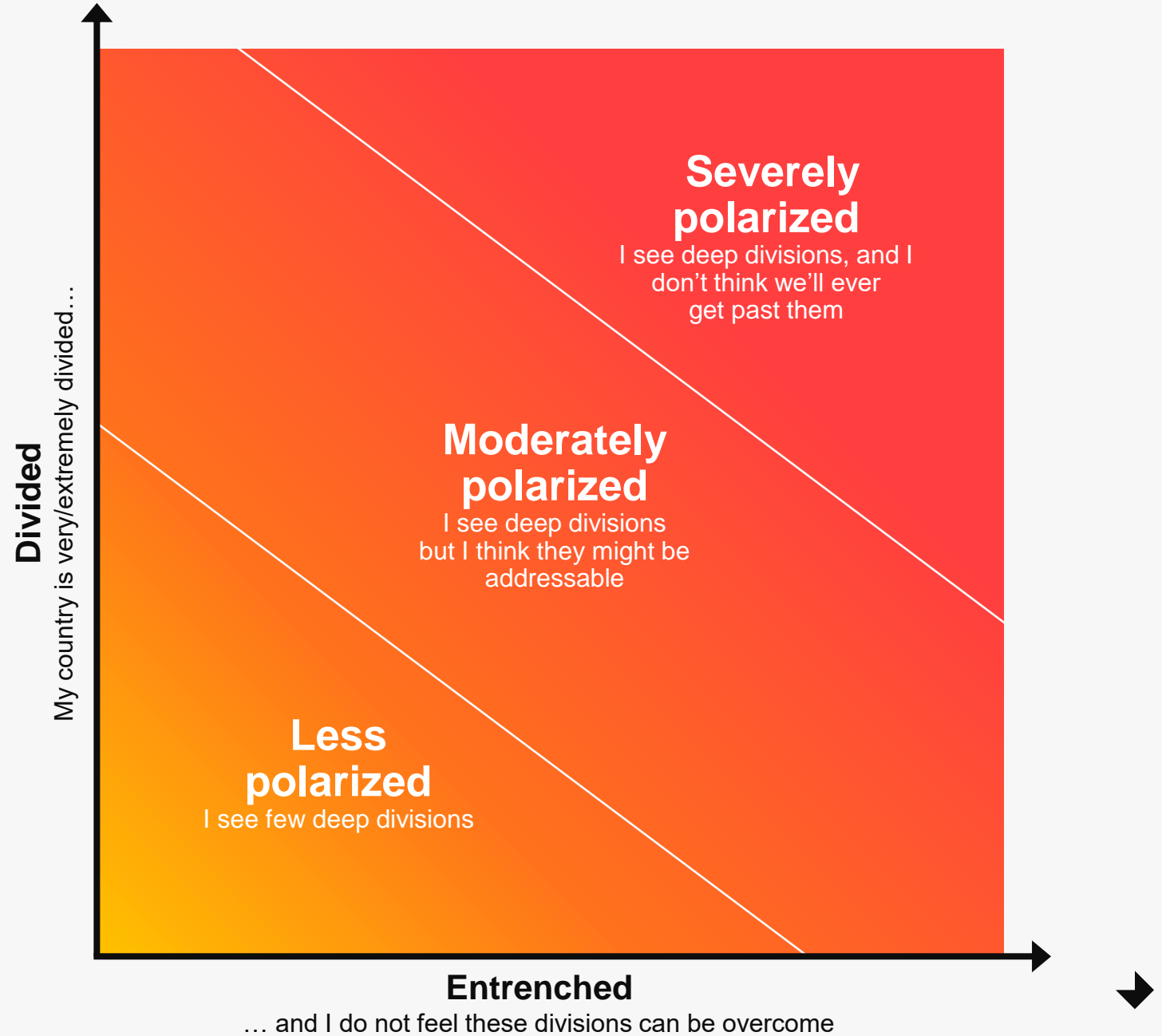


# Distrust Breeds Polarization

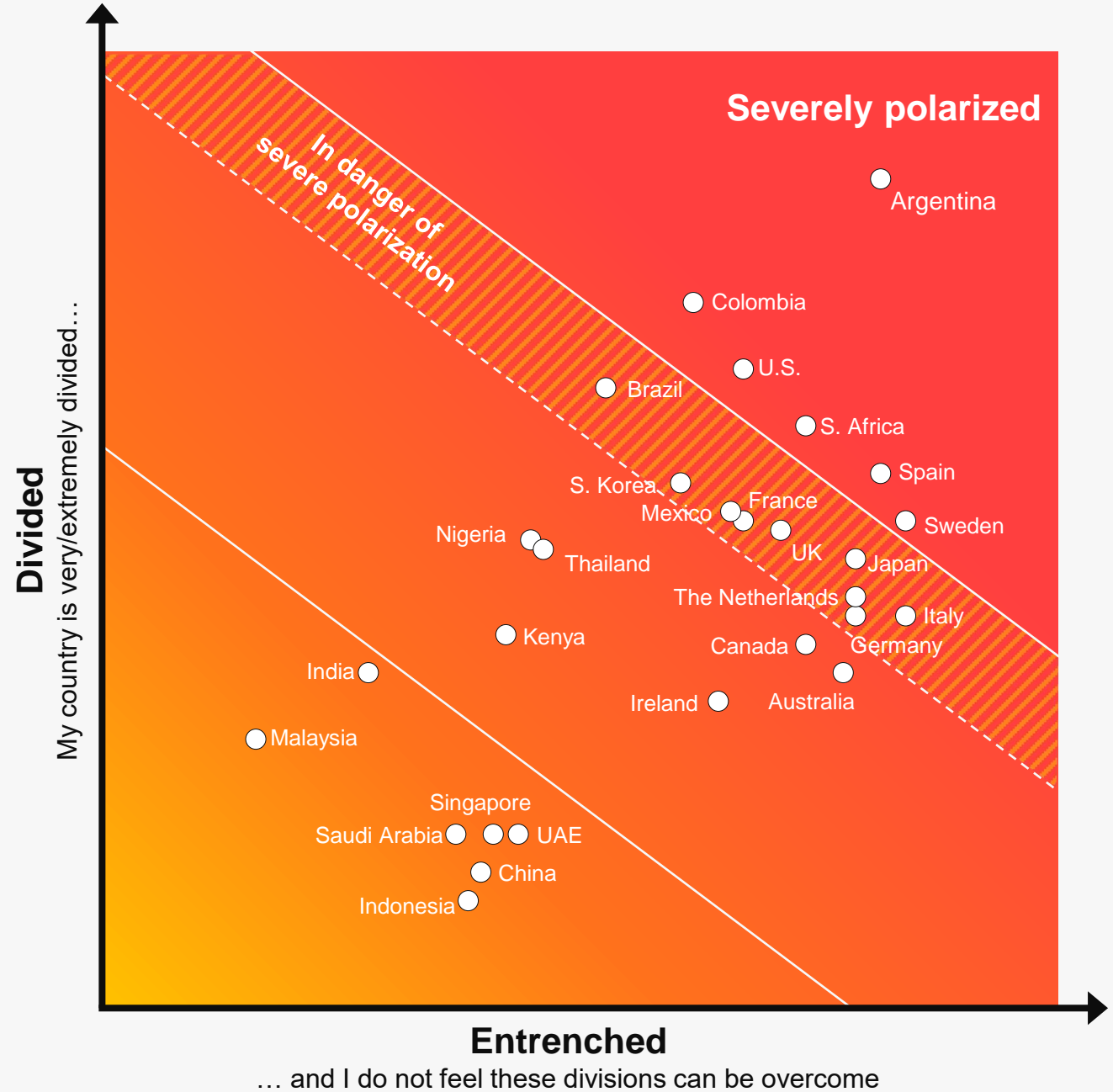




# Polarization Most Severe When Deep Divisions Become Entrenched



# 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."

# 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

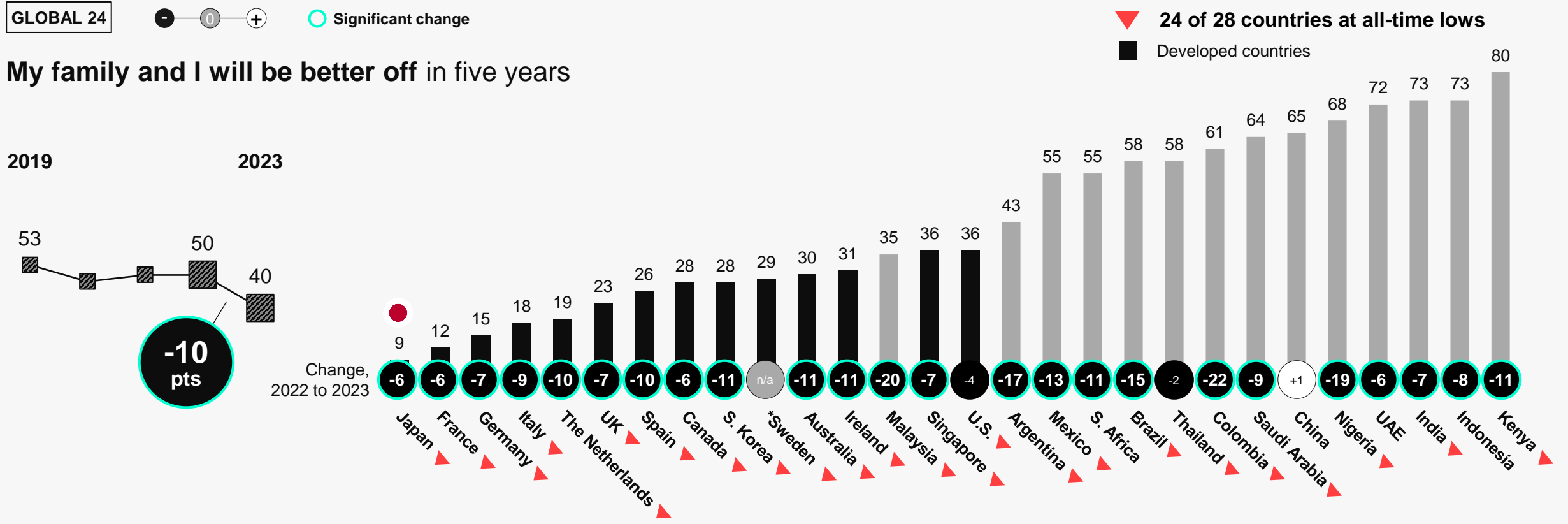


A shared media environment has given way to echo chambers, making it harder to collaboratively solve problems. Media is not trusted, with especially low trust in social media.



# Economic Optimism Collapses

Percent who say

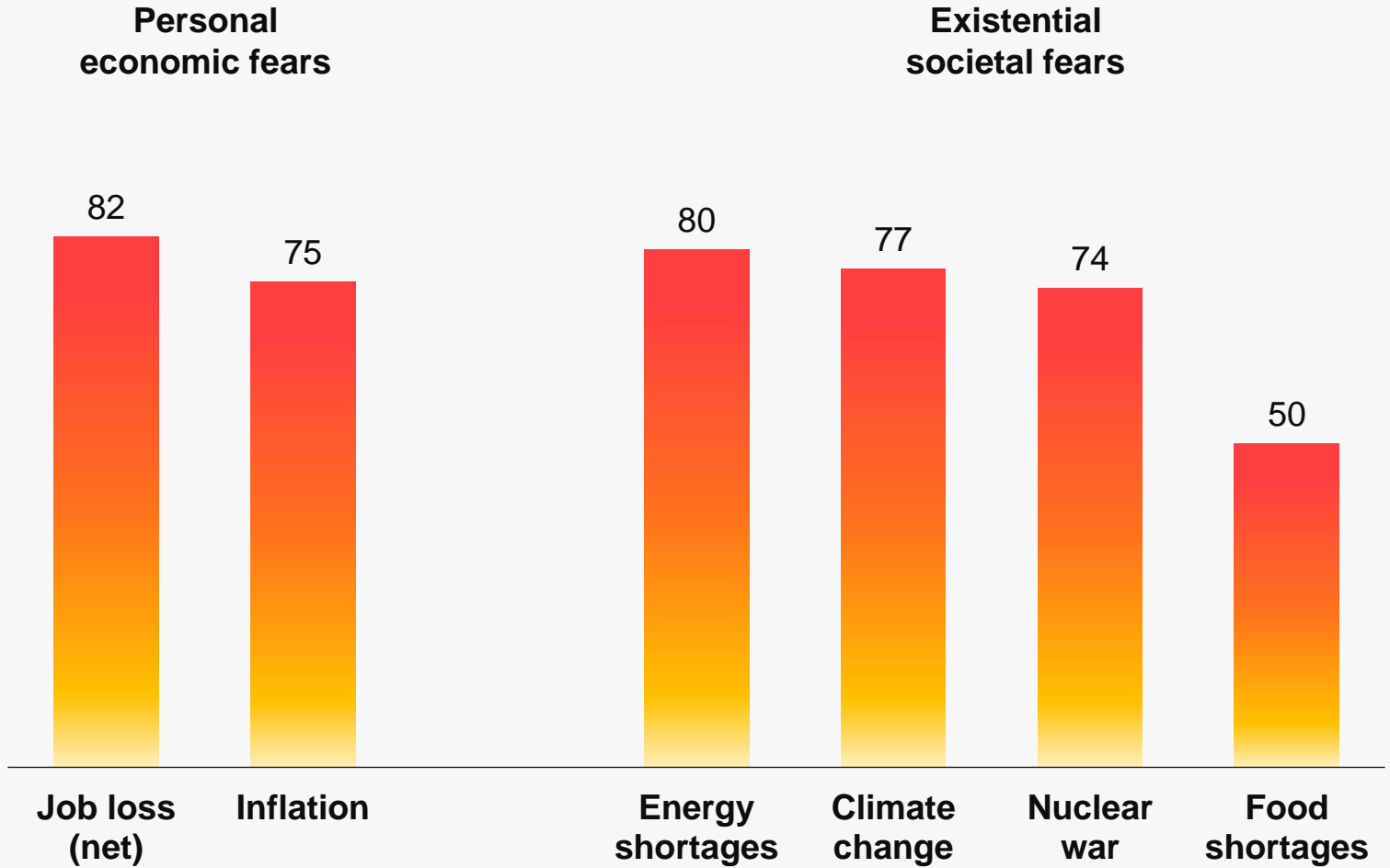


2023 Edelman Trust Barometer. CNG\_FUT. Thinking about the economic prospects for yourself and your family, how do you think you and your family will be doing in five years' time? 5-point scale; top 2 box, better off. General population, 24-mkt avg. \*Sweden is not included in the global average. Year-over-year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



# Personal Anxieties On Par With Existential Fears

Percent who worry about each, in Japan

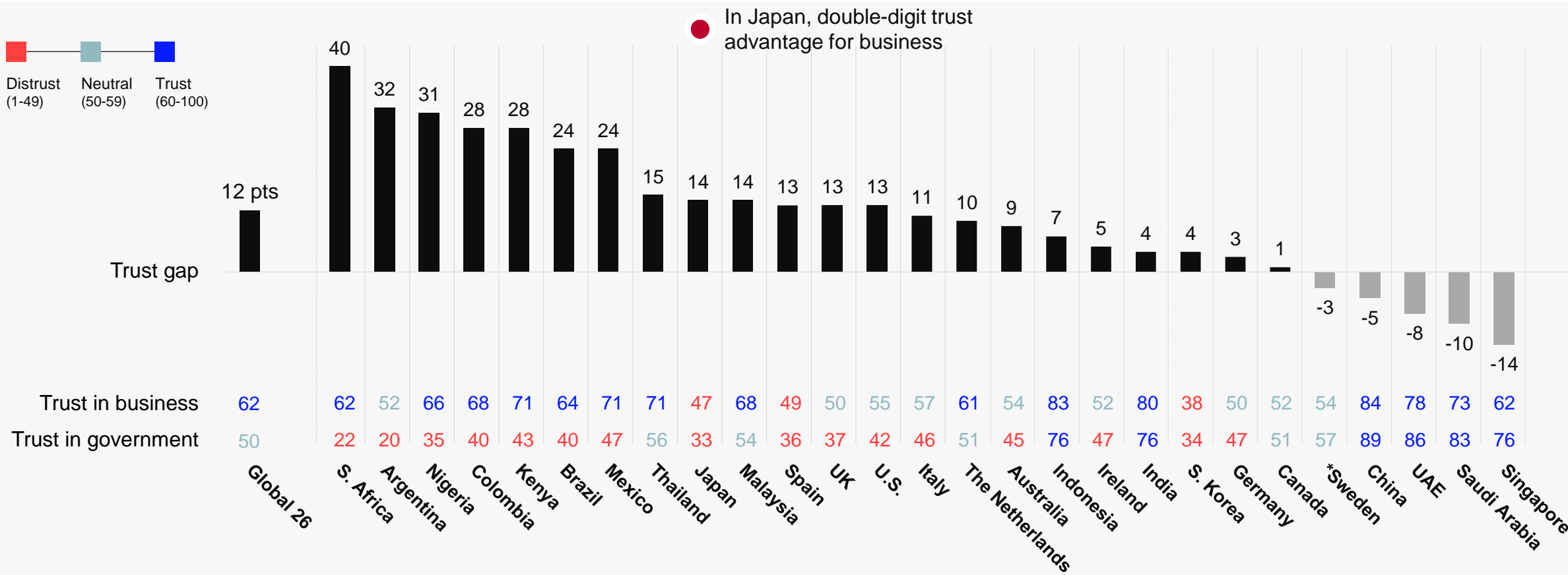


● 2023 Edelman Trust Barometer. POP\_EMO. Some people say they worry about many things while others say they have few concerns. We are interested in what you worry about. Specifically, how much do you worry about each of the following? 9-point scale; top 4 box, worry. Some attributes asked of half of the sample. General population, Japan. 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.



# Institutions Out of Balance: Government Far 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. \*Sweden is not included in the global average.

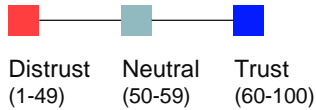
Due to a translation inconsistency, the France data was removed from this slide. For more details contact the Trust Barometer research team.



# 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, 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.

### 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:

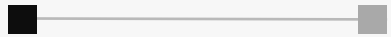
Thailand	37pts
U.S.	23pts
Saudi Arabia	20pts
China	19pts
Japan	19pts
UAE	19pts



# Divisive Forces Exploit and Intensify Our Differences

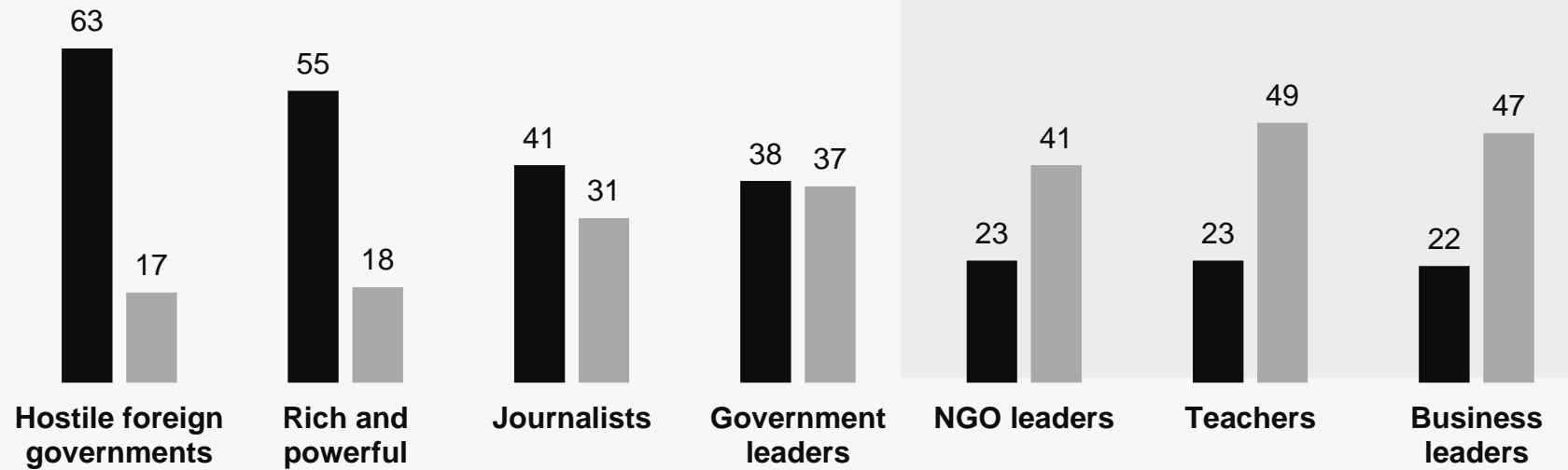
Percent who say, in Japan

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, Japan.



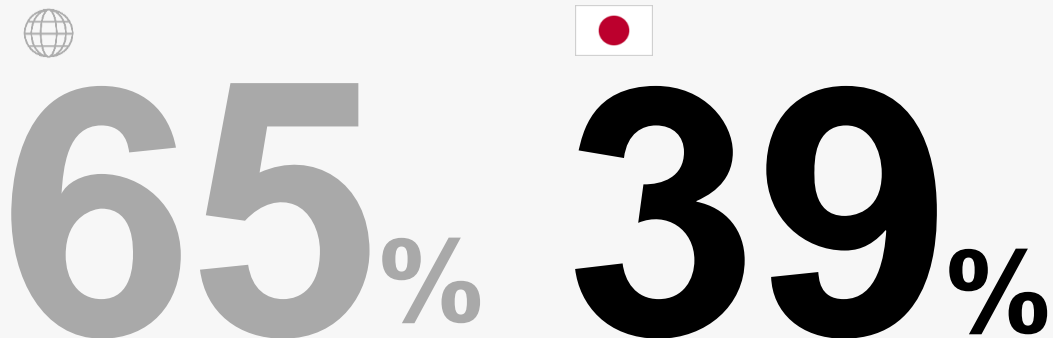


# Social Fabric Weakens

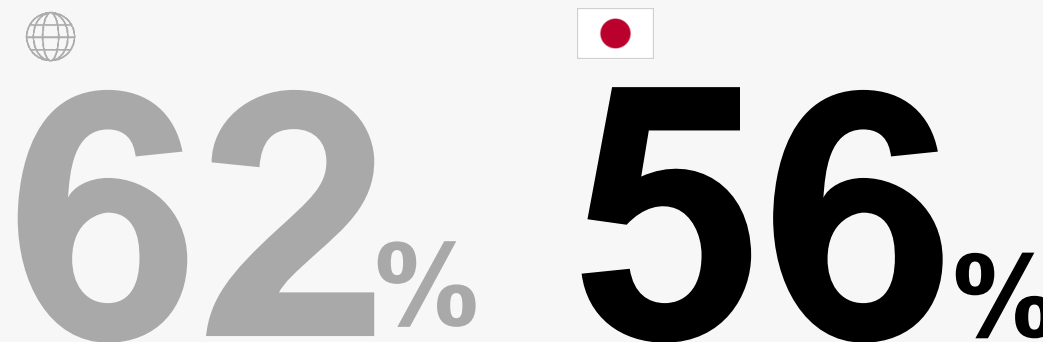
Percent who say

GLOBAL 27

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, 27-mkt avg., and Japan.



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

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

GLOBAL 27

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

**Help them**  
if they were in need



30% **21%**

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



20% **8%**

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



20% **7%**

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, 27-mkt avg., and Japan.

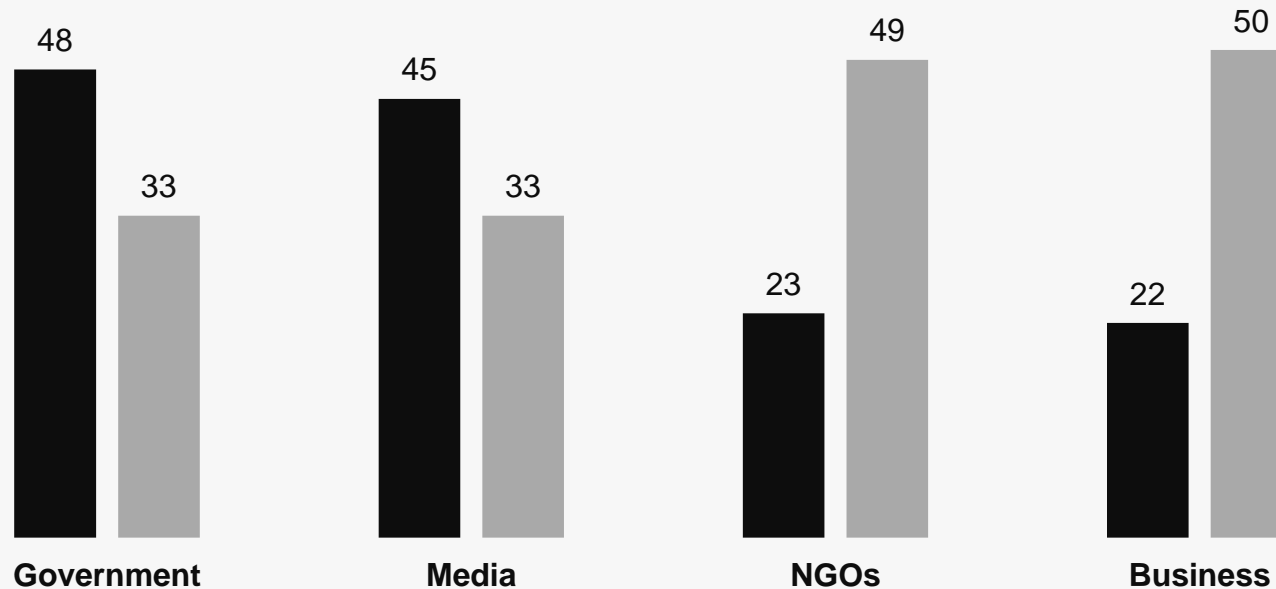


# Government and Media Fuel Cycle of Distrust, Seen as Sources of Misleading Information

Percent who say, in Japan

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, Japan.



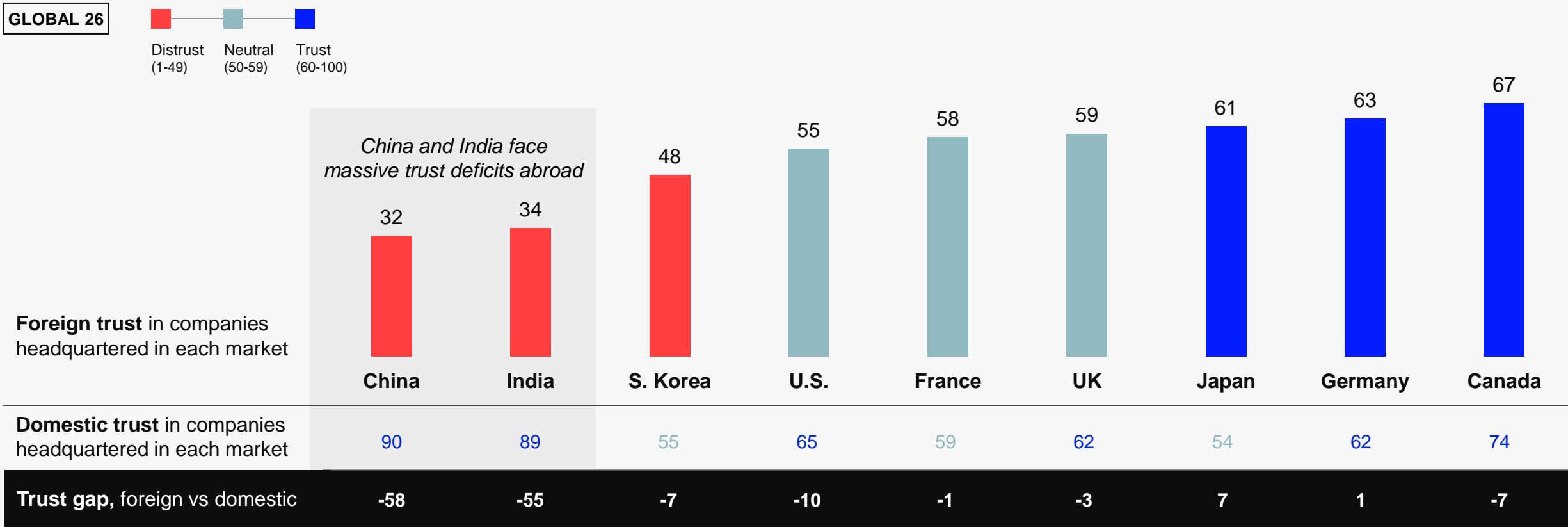
# Great Expectations, Heightened Risk for Business



# Trust at Home Does Not Guarantee Trust Abroad

## In Japan, Foreign Trust is Greater than Domestic Trust

Percent trust in companies headquartered in each country

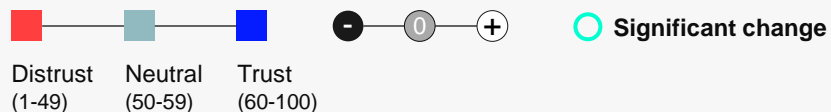


2023 Edelman Trust Barometer. TRU\_NAT. Now we would like to focus on global companies headquartered in specific markets. Please indicate how much you trust global companies headquartered in the following markets to do what is right. 9-point scale; top 4 box, trust. Question asked of half of the sample.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



# In Japan, My Employer Trusted

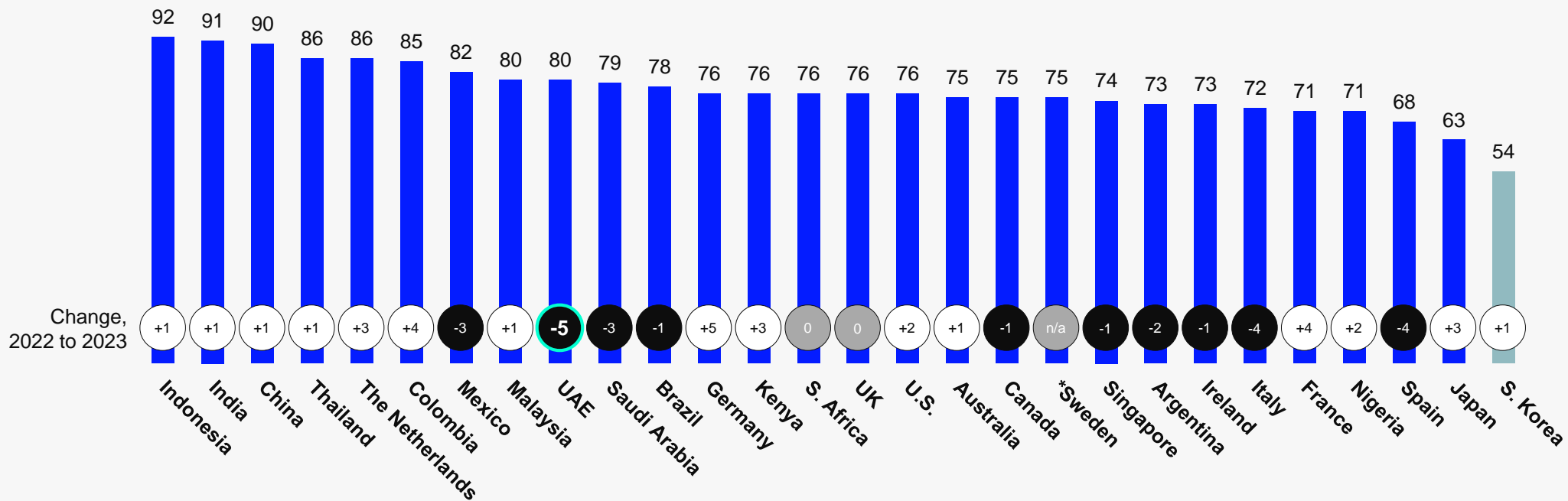
Percent trust



## Japan



Business	47
NGOs	38
Media	34
Government	33



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, 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.

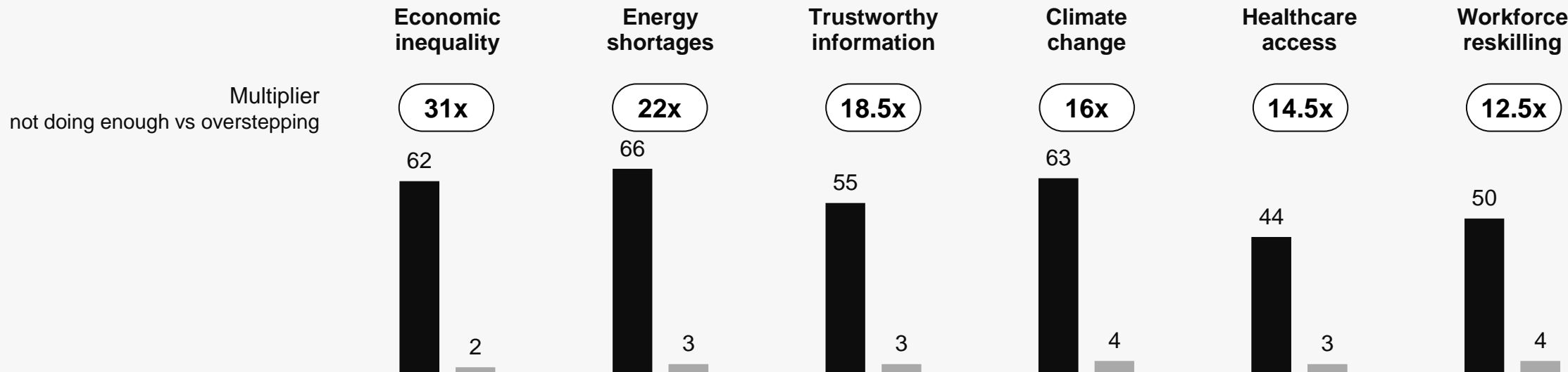


# Want More Societal Engagement from Business, Not Less

Percent who say, in Japan

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

■ not doing enough    ■ overstepping



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



# Navigating a Polarized World





# In Japan, CEOs Most Expected To Act on Employees, Climate, and the Wealth Gap

Percent who say, in Japan

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

Treatment of employees



Climate change



Wealth gap



Discrimination



Immigration



# Best Societal Outcomes When Government and Business Work Together

Percent who say, in Japan

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

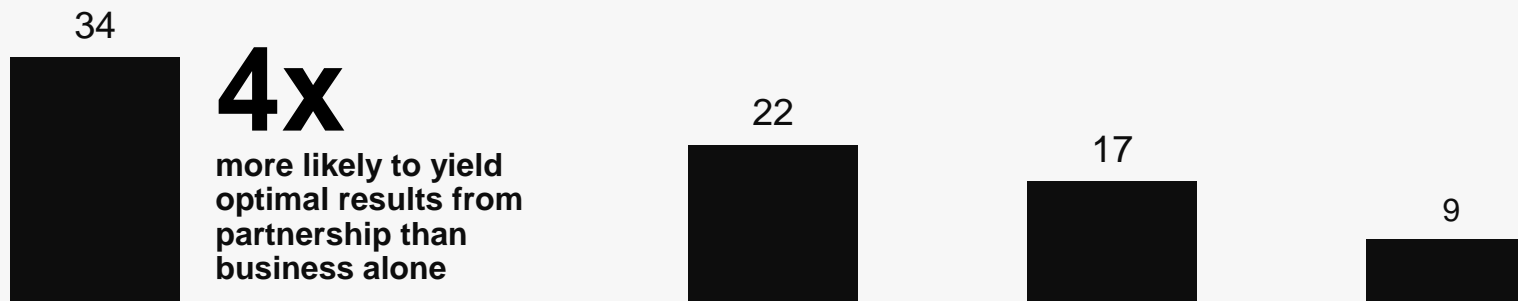
averaged across climate change, discrimination, immigration, employee treatment, and income inequality

Government and business working in **partnership**

Both working **independently**

**Government only** working alone

**Business only** working alone



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, Japan. Data is rebased to exclude those that said, "don't know" and is showing an average of five issues.



# Science Insulates Business Action from Politicization

Among the 30% who say it is possible for a business to address societal issues without being seen as politicized, percent who say, in Japan

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

**Base actions on science**



42

**Link actions to staying competitive**



32

**Be a trustworthy information source**



30

**Act on same values over time**



27

**Base actions on country laws**



26



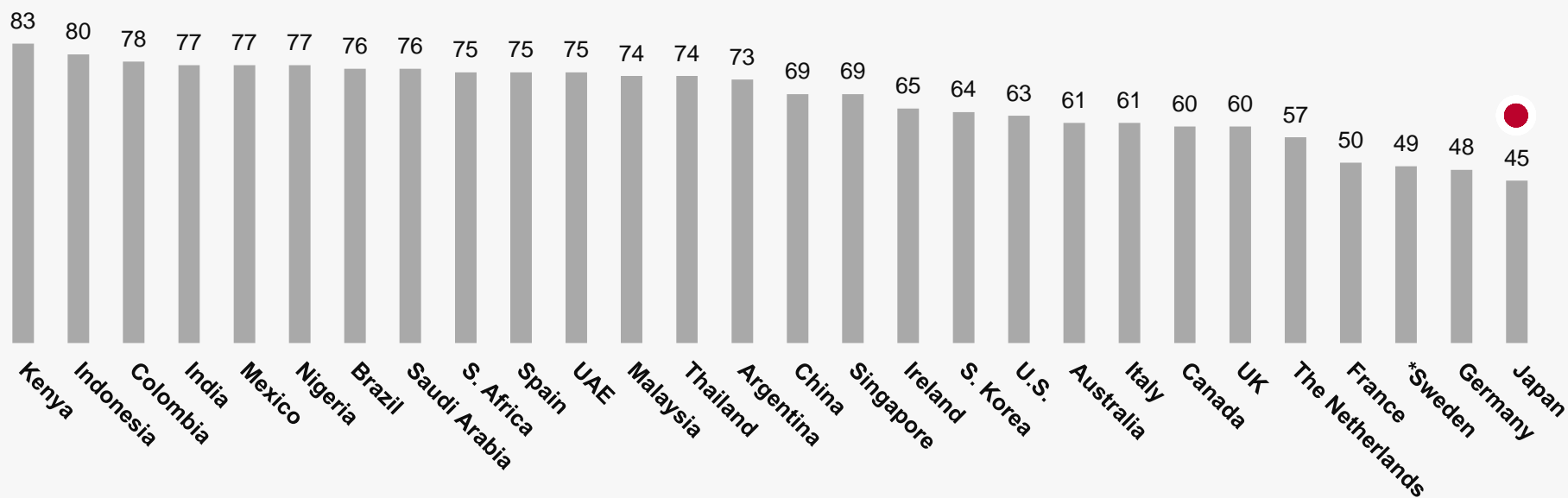
# Use the Power of Brands To Create a Shared Identity

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.



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

Percent who say, in Japan

CEOs are obligated to ...

Pay a fair wage



Ensure their home community is safe and thriving



Retrain employees



Pay fair corporate taxes



# 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.

