

19th ANNUAL EDELMAN TRUST BAROMETER

Methodology

Online Survey in 27 Markets

33,000+ respondents total

All fieldwork was conducted between
October 19 and November 16, 2018

27-market global data margin of error: General population +/- 0.6% (N=31,050), informed public +/- 1.3% (N=6,000), mass population +/- 0.6% (26,000+), half-sample global general online population +/- 0.8 (N=15,525).

Market-specific data margin of error: General population +/- 2.9 (N=1,150), informed public +/- 6.9% (N=min 200, varies by market, China and U.S. +/- 4.4% (N=500), mass population +/- 3.0 to 3.6 (N=min 739, varies by market).

Employee MOE: 27-market = +/- 0.8% (N=16,944)

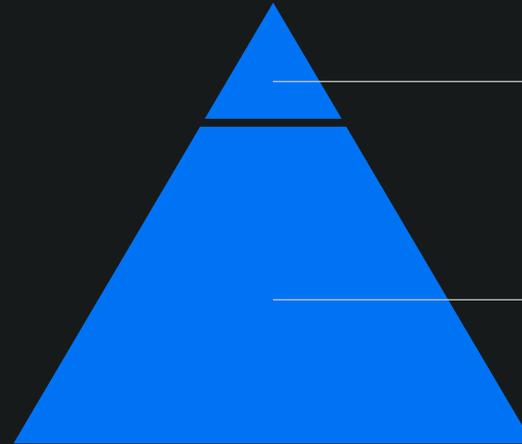
Market-specific = +/- 3.2 to 4.6% (N=min 446, varies by market)

General Online Population

1,150 respondents per market

Ages 18+

All slides show general online
population data unless otherwise noted



Informed Public

500 respondents in U.S. and China;
200 in all other markets

Represents 16% of total global population

Must meet 4 criteria

- Ages 25-64
- College-educated
- In top 25% of household income per age group in each market
- Report significant media consumption and engagement in public policy and business news

Mass Population

All population not including informed public

Represents 84% of total global population

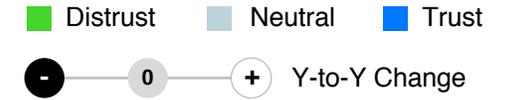
2019 Focus on Employer-Employee Relationship

55% of global general population are full- or part-time employees (but not self-employed)

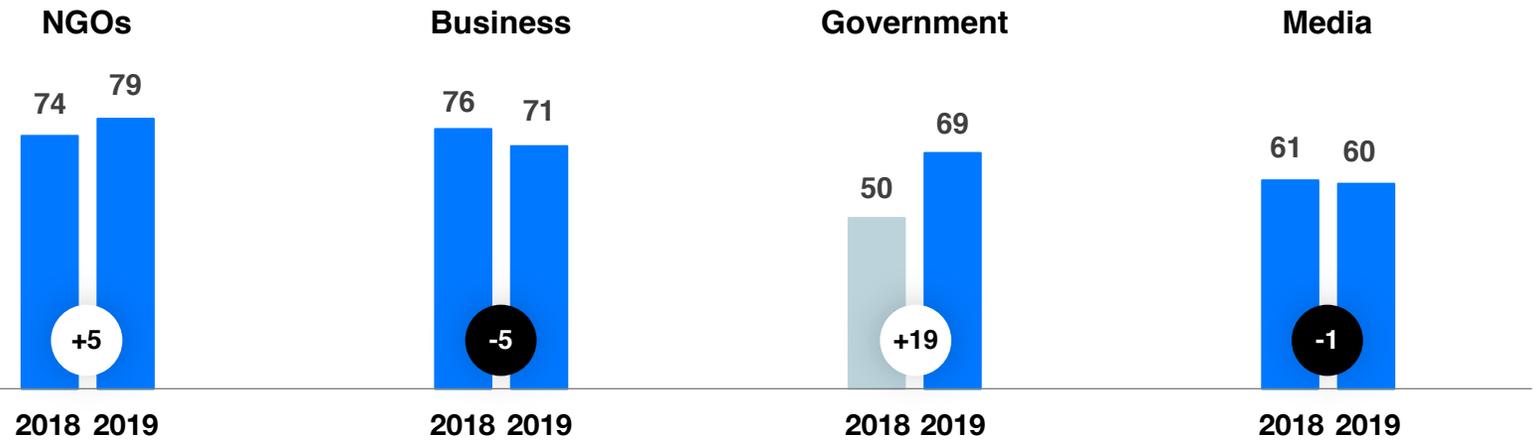
Oversample of employees of multinational companies: 500 respondents per market

TRUST IN GOVERNMENT RISES IN MALAYSIA

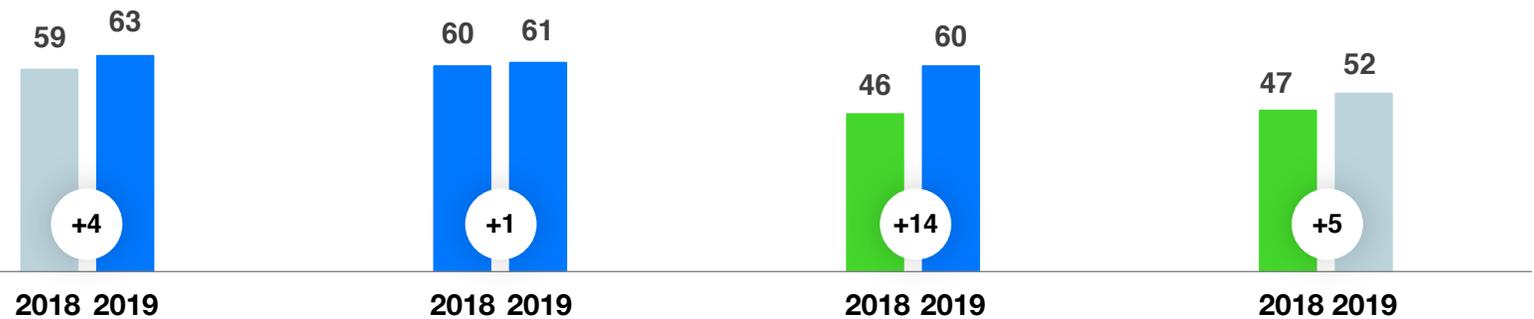
Percent trust



 **Informed public**



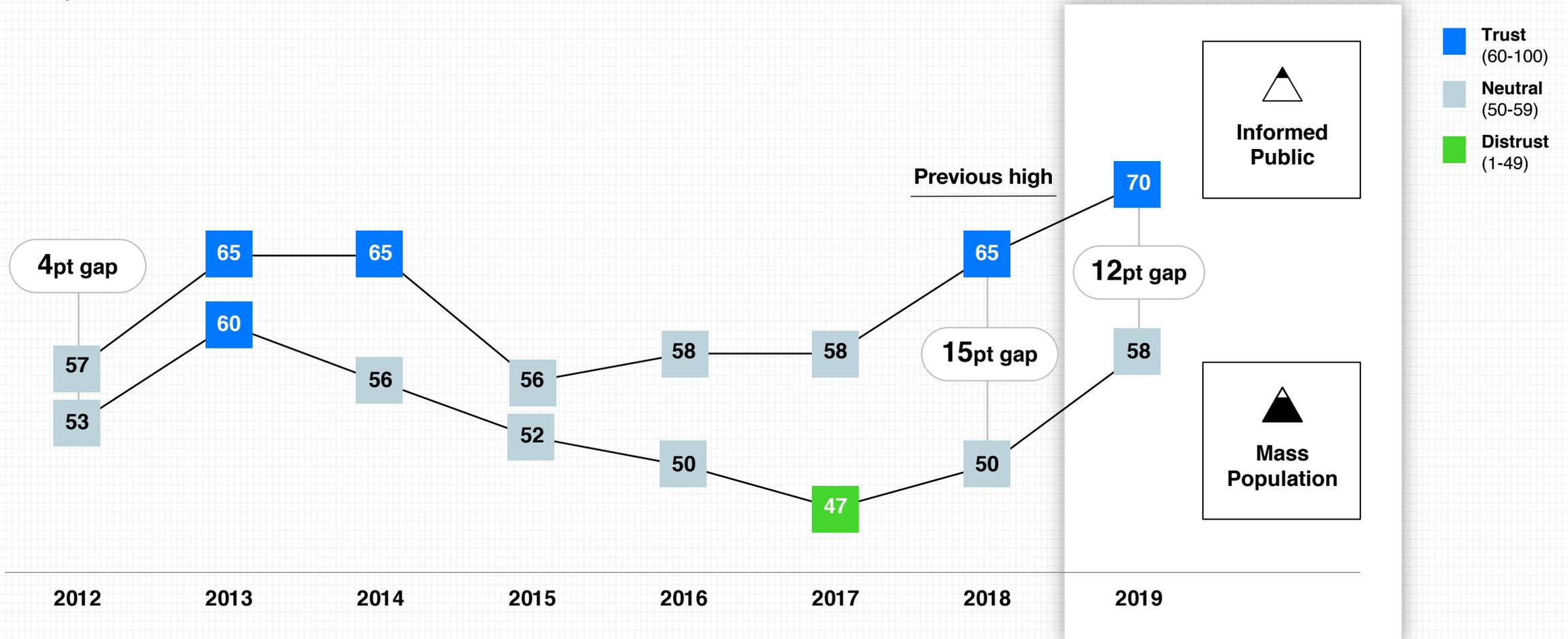
 **General population**



2019 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 using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Informed public and general population, Malaysia.

CONTINUED TRUST INEQUALITY IN MALAYSIA

Malaysia Trust Index

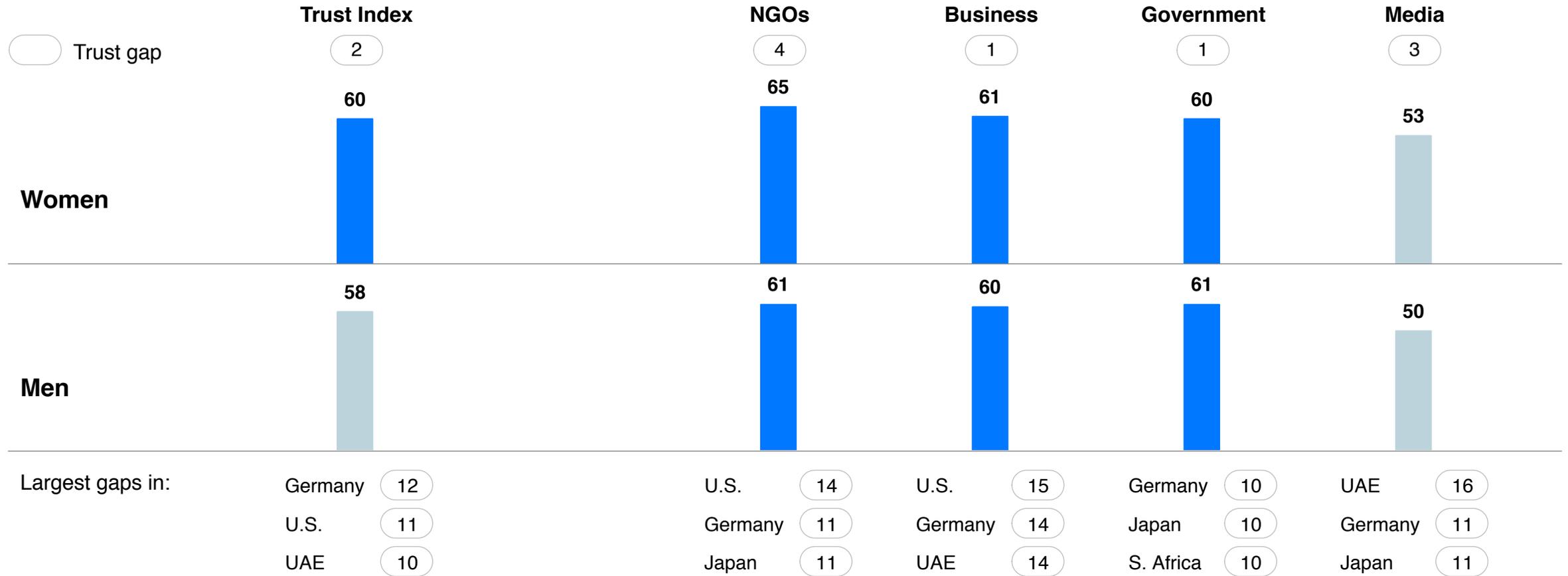


2019 Edelman Trust Barometer. The Trust Index is the average percent trust in NGOs, business, government and media. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. Informed public and mass population, Malaysia.

SIMILAR TRUST LEVELS AMONG MEN AND WOMEN IN MALAYSIA

Percent trust

■ Distrust ■ Neutral ■ Trust



WIDESPREAD FEARS OF JOB LOSS IN MALAYSIA

Percent of Malaysian employees who worry about job loss due to each issue

Not having the **training** and skills necessary to get a good paying job

Automation and/or other innovations taking your job away

International conflicts about **trade policies** and **tariffs** hurting the company you work for

All employees

70%

66%

66%

Multinational employees

70%

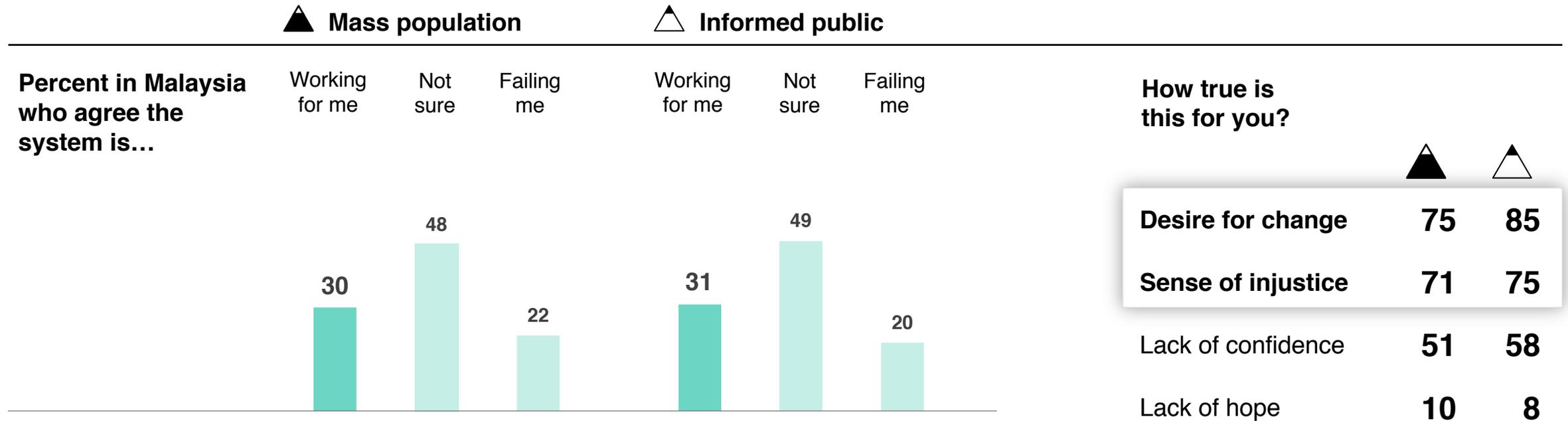
66%

67%

2019 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? 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, worried. Question asked of half of the sample. Attributes shown to those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, Malaysia.



LESS THAN 1 IN 3 BELIEVE THE SYSTEM IS WORKING FOR THEM



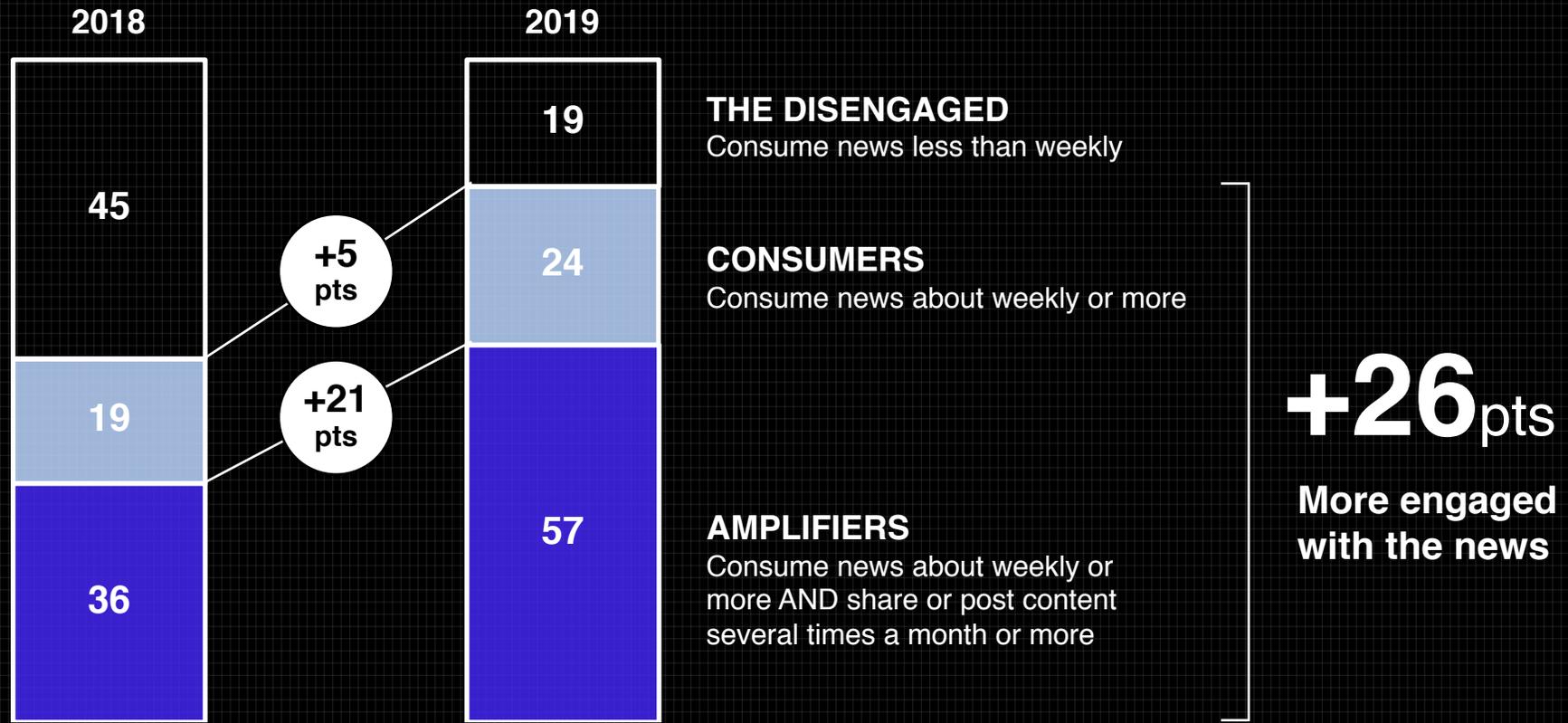
2019 Edelman Trust Barometer. “System failing” measure. For full details on how the “system failing” measure was calculated, please refer to the Technical Appendix. POP_MDC. Below is a list of statements. For each one, please rate how true you believe that statement is using a nine-point scale where one means it is “not at all true” and nine means it is “completely true”. 9-point scale; top 4 box, true. Informed public and mass population, Malaysia. Sense of injustice is an average of POP_MDC/1,2,3,8; Desire for change is POP_MDC/9; Lack of confidence is POP_MDC/10; Lack of hope is an average of POP_MDC/18,19,20 [reverse scored].



MASSIVE RISE IN NEWS ENGAGEMENT

How often do you engage in the following activities related to news and information?

- 0 + Y-to-Y Change

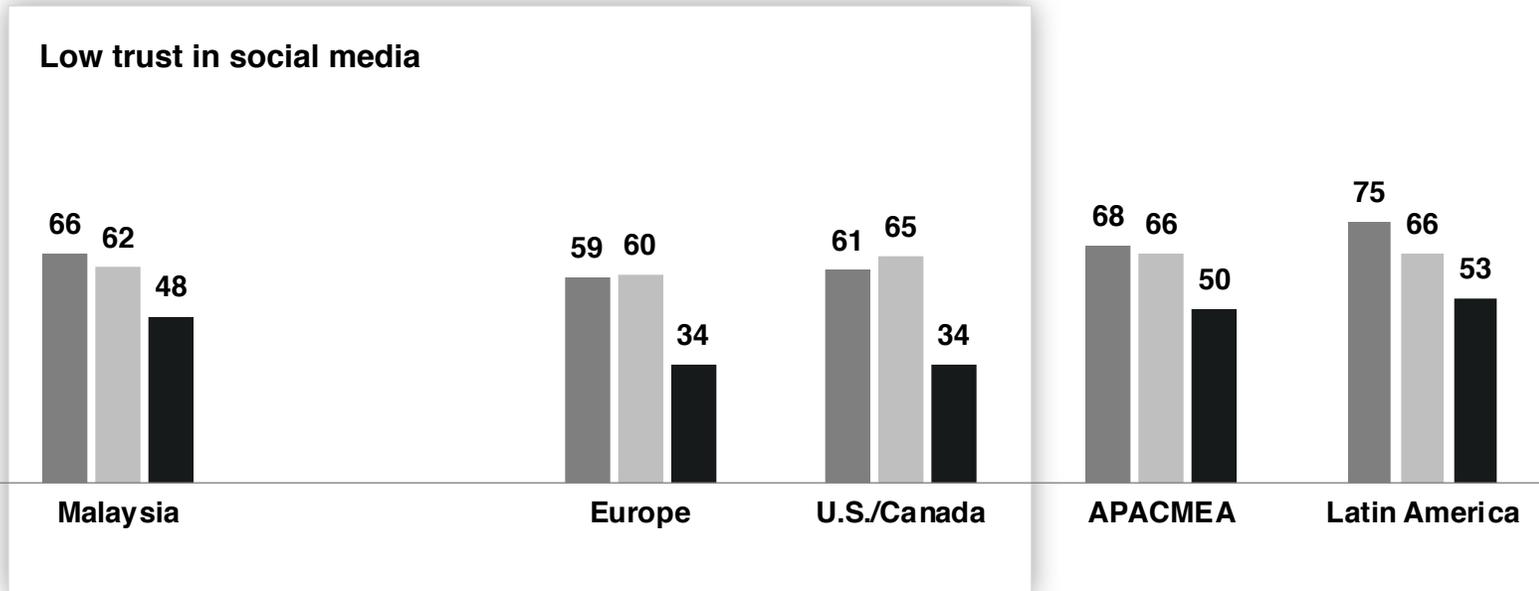


2019 Edelman Trust Barometer. News Engagement Scale, built from MED_SEG_OFT. How often do you engage in the following activities related to news and information? Indicate your answer using the 7-point scale below. Question asked of half of the sample. General population, Malaysia. For details on how the News Engagement Scale was built, please refer to the Technical Appendix.

MALAYSIA LOOKING FOR RELIABLE SOURCES

Percent in Malaysia who trust each source of news

■ Search ■ Traditional media ■ Social media



82%

worry about false information or fake news being used as a weapon

2019 Edelman Trust Barometer. ATT_MED_AGR. Below is a list of statements. For each one, please rate how much you agree or disagree with that statement using a nine-point scale where one means “strongly disagree” and nine means “strongly agree”. 9-point scale; top 4 box, agree. Question asked of half of the sample. General population, Malaysia. COM_MCL. When looking for general news and information, how much would you trust each type of source for general news and information? Please use a 9-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal”. 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Malaysia and by region.

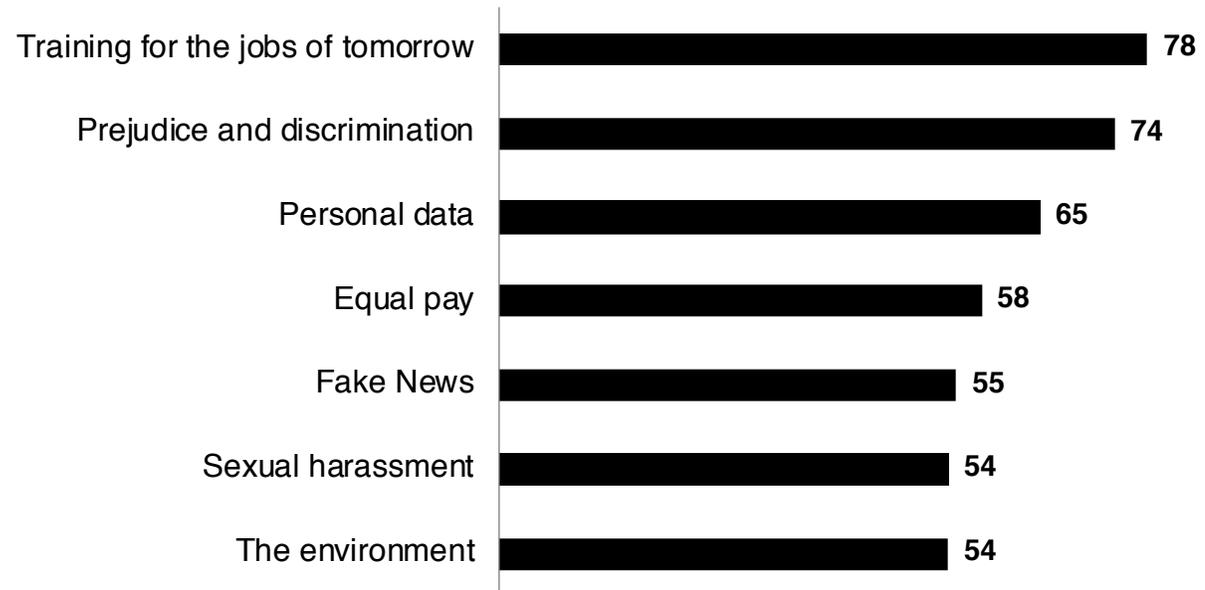


MALAYSIA LOOKING FOR LEADERSHIP FROM CEOS

Percent in Malaysia who say that CEOs should take the lead on change rather than waiting for government to impose it

84% 
13pts

Percent who agree CEOs can create positive change in:



MALAYSIA LOOKING FOR LEADERSHIP FROM MY EMPLOYER

77%

of Malaysian employees agree
**It's critically important for my CEO
to respond to challenging times**

- Industry issues
- Political events
- National crisis
- Employee-driven issues

2019 Edelman Trust Barometer. CEO_DIR. On which of the following occasions do you believe it is critically important to hear directly from the CEO or head of the organization you work for? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Malaysia.

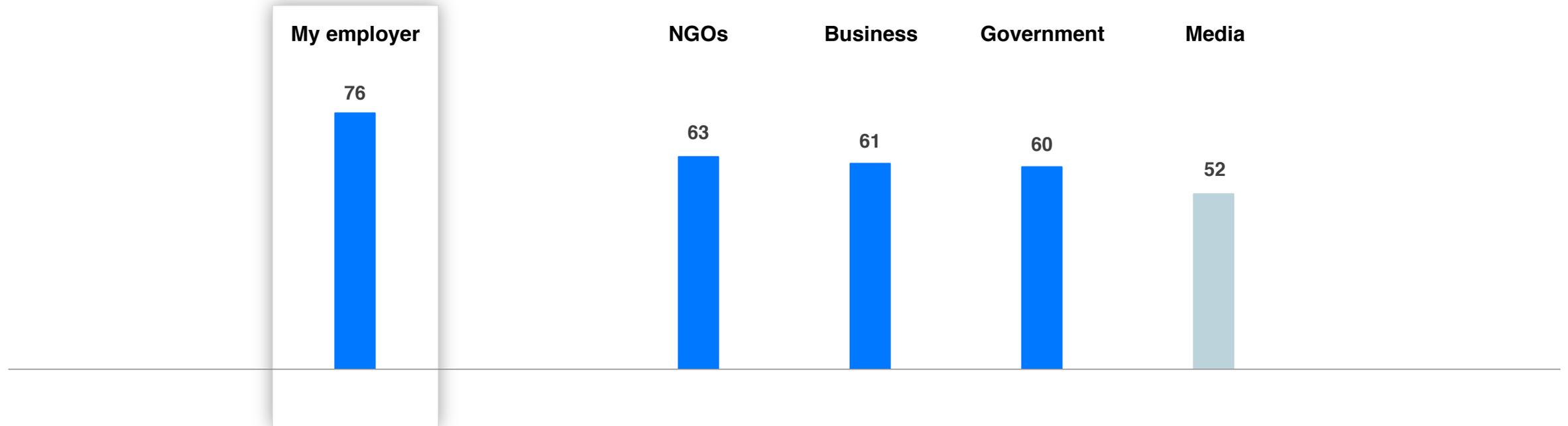
Data shown is a net of “when there is major news or an event that affects our industry or sector,” “when there is a major social or political event that affects our country,” “when there is a crisis in the country,” and “when employees demand that the CEO publicly take a stand on an important issue”.



MY EMPLOYER MOST-TRUSTED RELATIONSHIP

Percent trust

■ Distrust ■ Neutral ■ Trust



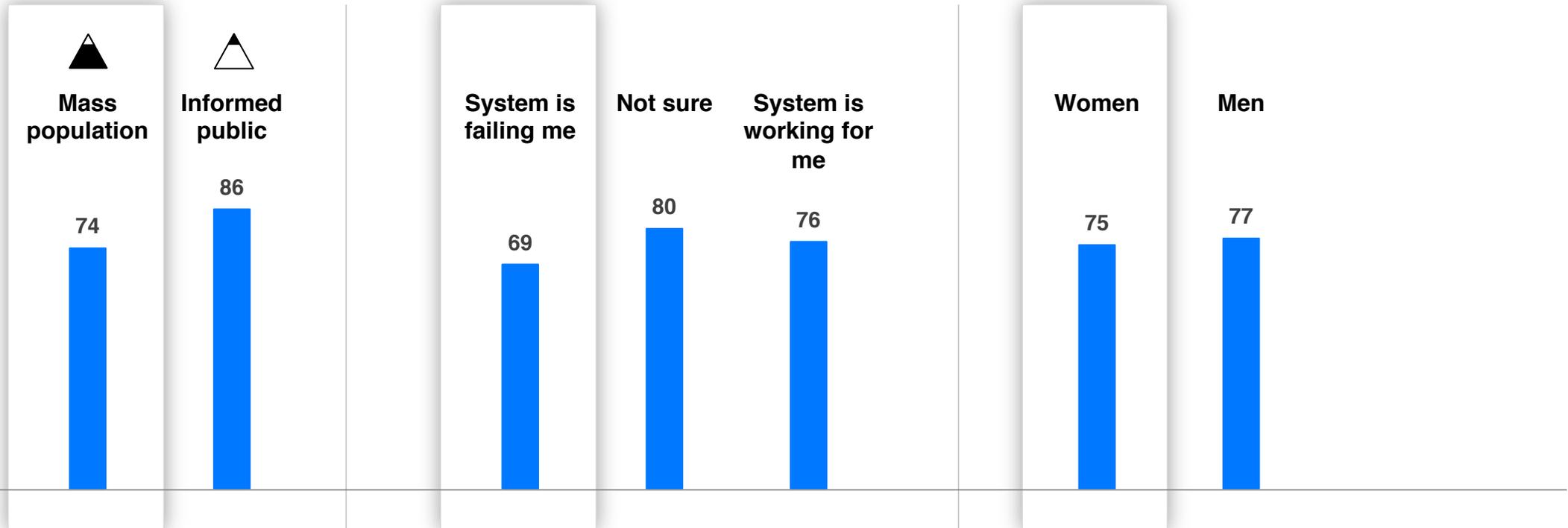
2019 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal.” 9-point scale; top 4 box, trust. “Your employer” asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population, Malaysia.



EMPLOYERS TRUSTED EVEN BY THE DISENFRANCHISED

Percent trust in “my employer”

■ Distrust ■ Neutral ■ Trust



2019 Edelman Trust Barometer. TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Question asked of those who are employed, but not self employed (Q206/1 OR 2 AND NOT Q421/8). General population employees, mass population employees and informed public employees, Malaysia, by gender, and “system failing” scale.

For details on how the “system failing” measure was calculated, please refer to the Technical Appendix.



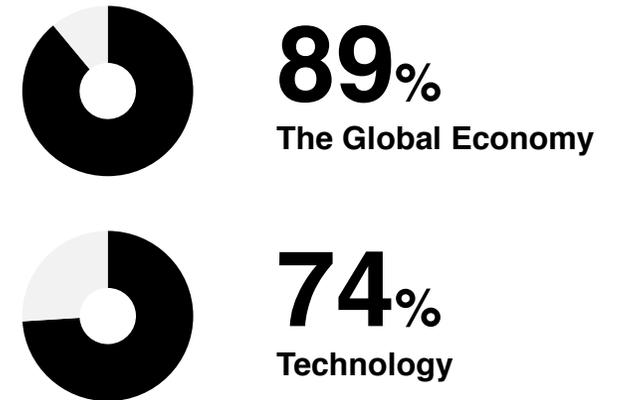
EMPLOYERS TRUSTED TO PROVIDE CERTAINTY

Percent who agree

I look to my employer to be a trustworthy source of information about social issues and other important topics **on which there is not general agreement**



Malaysian employees see business as trustworthy source on:



2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees and multinational employees, Malaysia. BUS_SRC. Below is a list of topics and social issues. Please indicate about which of the following you believe business in general to be a trustworthy information source. Question asked of half of the sample. General population, Malaysia, among those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7).

“The Economy” is a net of BUS_SRC/3,7,8,9,10; “Technology” is a net of BUS_SRC/2,5,6,11.



MALAYSIAN EMPLOYEE EXPECTATIONS NOW INCLUDE SOCIETAL CHANGE

Percent of Malaysian employees who expect each from a prospective employer

Strong expectation
You would have to **pay me a lot more** to work for an organization that does not offer this

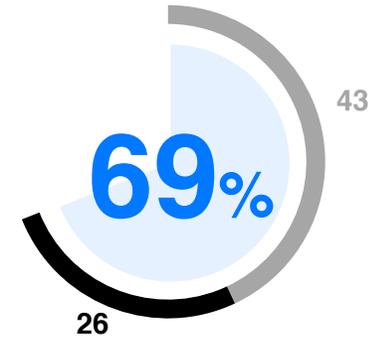
Deal breaker
I would **never** work for an organization that does not offer this

2019 Edelman Trust Barometer. 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? Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Malaysia. Buckets are the sum of the average of codes 1 & 2 for the items that make up each dimension. For details on the full list of items that went into each of the three dimensions, please refer to the Technical Appendix.



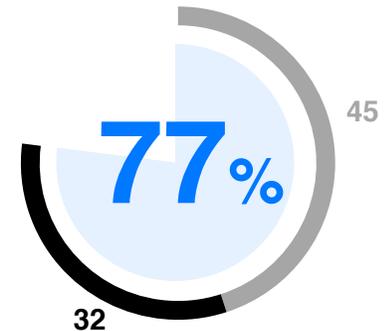
Shared Action

My employer has a greater purpose, and my work has a meaningful societal impact



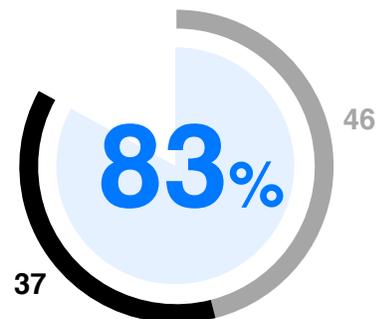
Personal Empowerment

I know what is going on, I am part of the planning process, and I have a voice in key decisions; the culture is values-driven and inclusive



Job Opportunity

My employer offers wage growth, training, career growth and work which I find interesting & fulfilling



TRUST CEMENTS THE EMPLOYER-EMPLOYEE PARTNERSHIP

Percent of Malaysia employees who engage in these types of behaviors on behalf of their employer



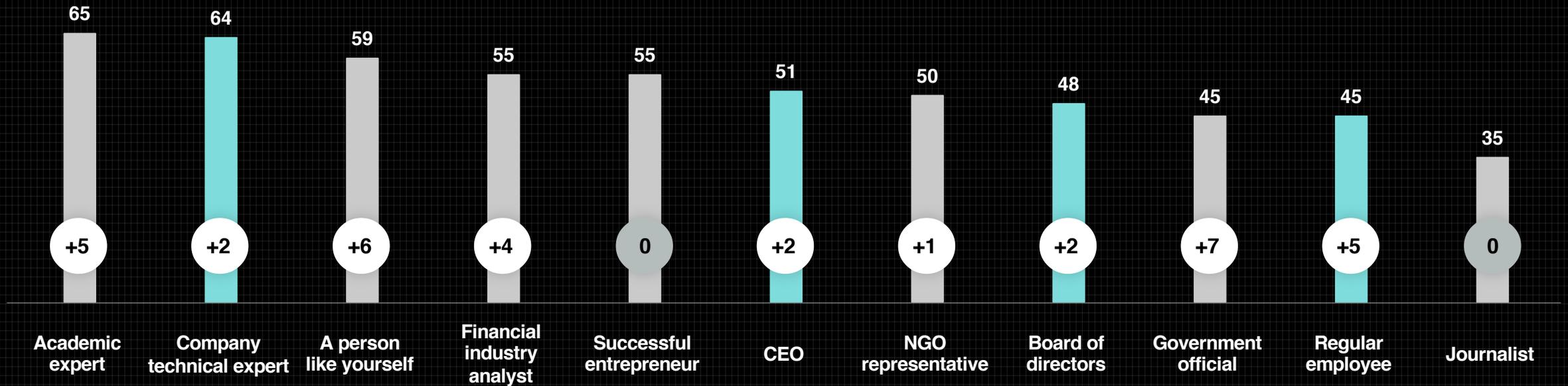
2019 Edelman Trust Barometer. EMP_ENG. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Malaysia, cut by those who trust their employer (codes 6-9) and those who do not (codes 1-5; 99). TRU_INS. [YOUR EMPLOYER] Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right using a nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Malaysia. Advocacy is an average of (EMP_ENG/3-5); Loyalty is an average of (EMP_ENG/1-2); Engagement is an average of (EMP_ENG/10-15); Commitment is an average of (EMP_ENG/6-9). See the tech appendix for a complete list of the items that went into each employee KPI dimension.



ACTIVATE EMPLOYEE VOICES

Percent in Malaysia who rate each source as very/extremely credible

■ Company voices
○ - 0 + Y-to-Y Change



2019 Edelman Trust Barometer. CRE_PPL. Below is a list of people. In general, when forming an opinion of a company, if you heard information about a company from each person, how credible would the information be—extremely credible, very credible, somewhat credible, or not credible at all. 4-point scale; top 2 box, credible. Question asked of half of the sample. General population, Malaysia.

INVESTING IN EMPLOYEE TRUST IS INVESTING IN YOUR BOTTOM LINE

How a company treats its employees is one of the best indicators of its level of trustworthiness

82%

Percent who agree that “a good reputation may get me to try a product, but unless I come to trust the company behind the product, I will soon stop buying it”

75%

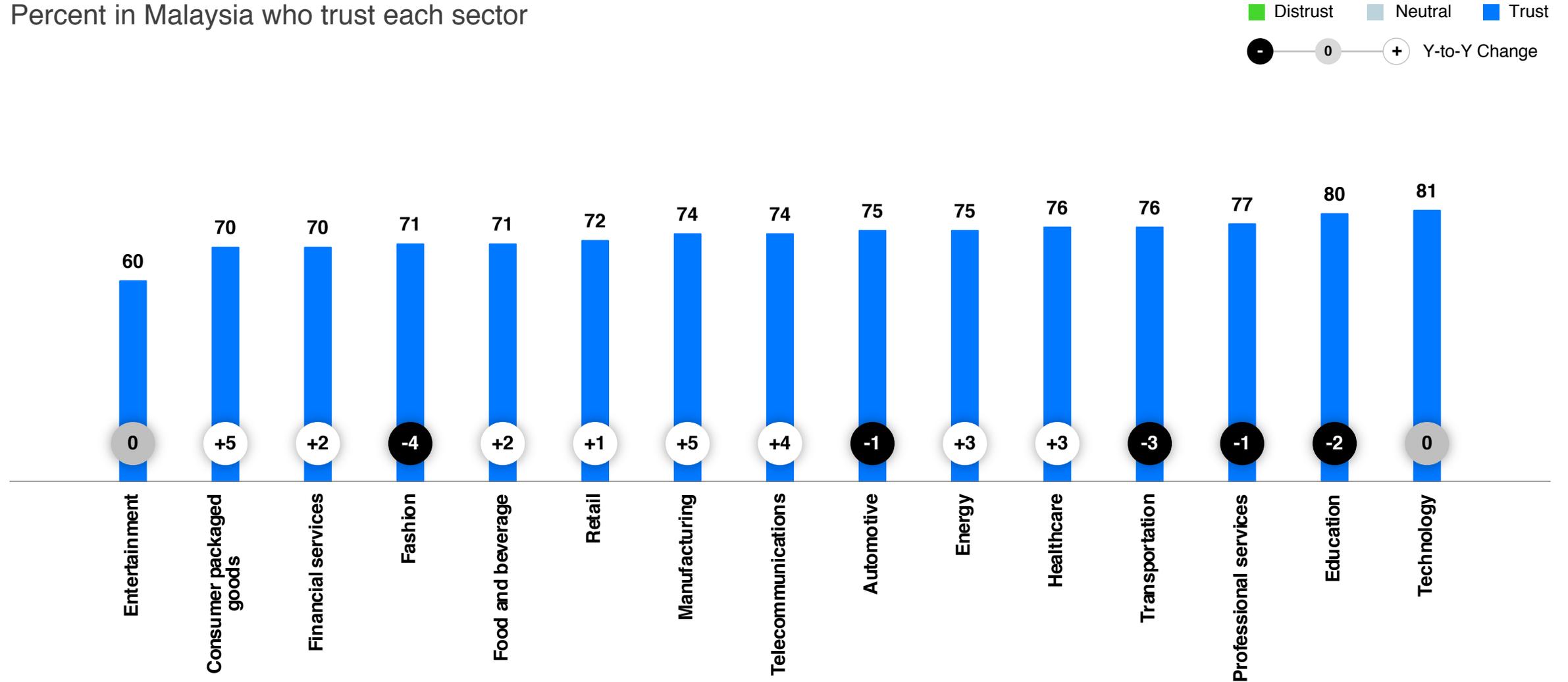




Supplemental Data Appendix

TRUST INCREASES IN 8 OF 15 SECTORS

Percent in Malaysia who trust each sector



2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, Malaysia.



SOME INDUSTRY SECTORS AT FIVE-YEAR HIGHS

Percent in Malaysia who trust each sector

■ Distrust
 ■ Neutral
 ■ Trust

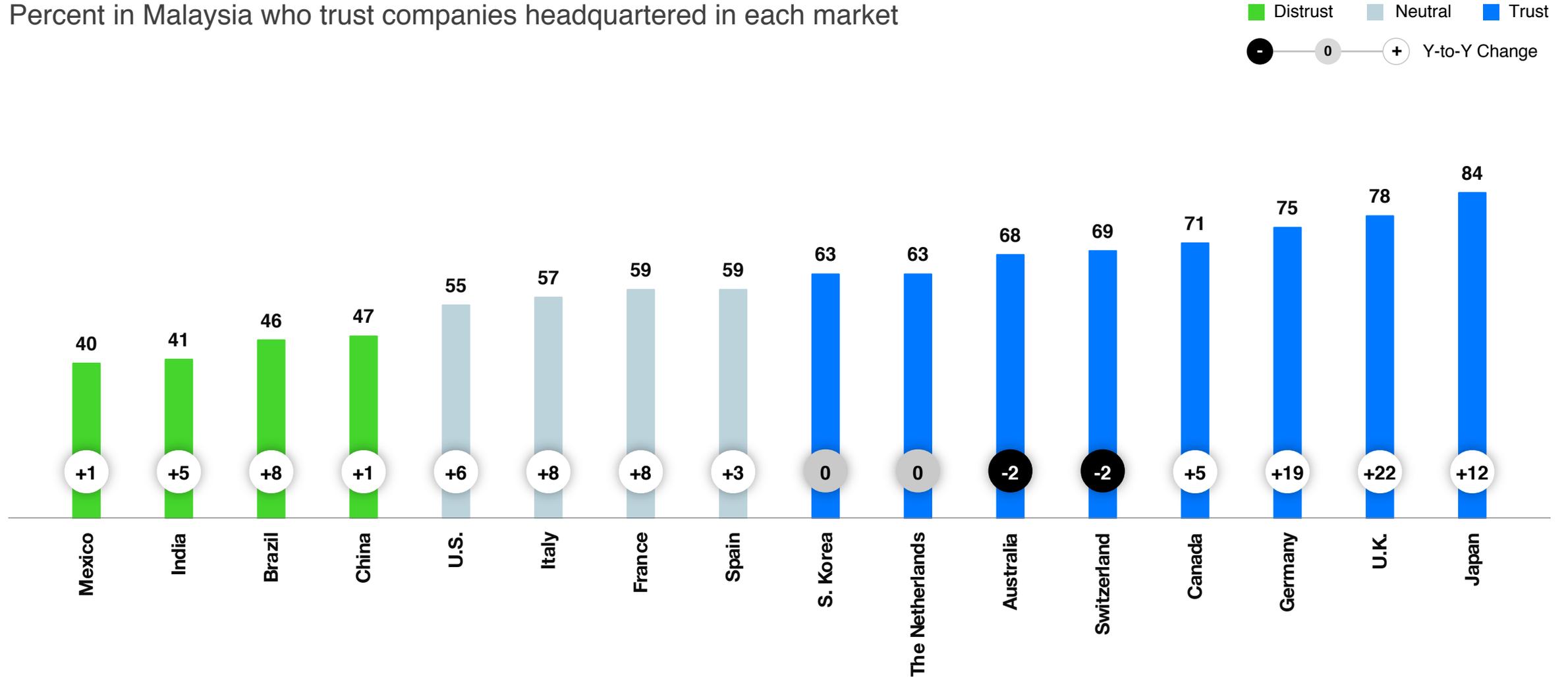
-
0
+
 Change, 2015 to 2019

Industry	2015	2016	2017	2018	2019	5yr. trend
Technology	83	81	81	81	81	-2
Healthcare	-	75	76	73	76	n/a
Automotive	79	74	75	76	75	-4
Energy	69	68	72	72	75	+6
Telecommunications	75	71	75	70	74	-1
Food and beverage	69	68	73	69	71	+2
Consumer packaged goods	69	64	67	65	70	+1
Financial services	67	67	69	68	70	+3
Entertainment	63	57	59	60	60	-3

2019 Edelman Trust Barometer. TRU_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, Malaysia.

MALAYSIAN TRUST RISES IN 12 OF 16 COUNTRY BRANDS

Percent in Malaysia who trust companies headquartered in each market

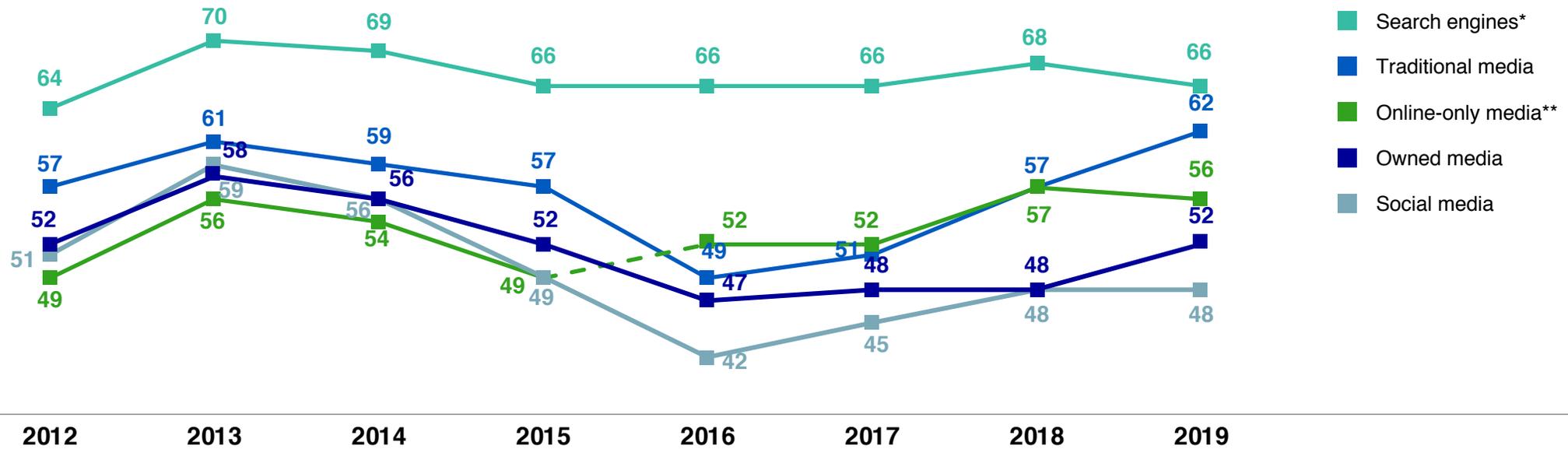


2019 Edelman Trust Barometer. TRU_NAT. Now we would like to focus on global companies headquartered in specific countries. Please indicate how much you trust global companies headquartered in the following countries to do what is right. Use the same nine-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. 9-point scale; top 4 box, trust. Markets shown to half of the sample. General population, Malaysia.



SEARCH MOST TRUSTED IN MALAYSIA

Percent in Malaysia who trust each source for general news and information



2019 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? Please use a nine-point scale where one means that you “do not trust it at all” and nine means that you “trust it a great deal.” 9-point scale; top 4 box, trust. Question asked of half of the sample. General population, Malaysia.

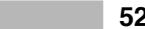
*From 2012-2015, “Online Search Engines” were included as a media type. In 2016, this was changed to “Search Engines.”

**From 2012-2015, “Hybrid Media” was included as a media type. In 2016, this was changed to “Online-Only media.”



DEMOGRAPHIC PROFILE OF EACH NEWS ENGAGEMENT SEGMENT

■ Distrust
 ■ Neutral
 ■ Trust

	Trust Index	Age	Gender	Education	Income
THE DISENGAGED Consume news less than weekly		18-34  45 35-54  42 55+  13	Female  64 Male  36	Less than college  48 College+  52	Low  34 Middle  42 High  24
CONSUMERS Consume news about weekly or more		18-34  39 35-54  44 55+  17	Female  48 Male  52	Less than college  50 College+  50	Low  33 Middle  44 High  24
AMPLIFIERS Consume news about weekly or more AND share or post content several times a month or more		18-34  42 35-54  43 55+  15	Female  45 Male  55	Less than college  47 College+  52	Low  27 Middle  43 High  30

2019 Edelman Trust Barometer. The Trust Index is an average of a market's trust in the institutions of government, business, media and NGOs. S15. What is your current age? S6. Are you male or female? S7. What is the last grade in school you completed? S8. Thinking about your annual household income in 2017, which of the following categories best describes your total household income that year? General population, Malaysia, by the News Engagement Scale.

For details on how the News Engagement Scale was built, please refer to the Technical Appendix.



MALAYSIA EMPLOYEE EXPECTATIONS IN DETAIL

	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap
Job Opportunity	46	37	83	69	14
Wages	43	41	84	66	18
Interesting work experience	45	37	82	74	8
Training programs	47	38	85	70	15
Career opportunities	47	33	80	66	14
Personal Empowerment	45	32	77	67	10
Management always tells the truth	43	39	82	68	14
Regular communications	46	33	79	70	9
Employees have a voice	50	33	83	68	15
CEO embodies organization's values	43	34	77	71	6
Employees included in planning	46	30	76	66	10
Diversity	47	28	75	71	4
Organization acts on its values	39	28	67	58	9
Shared Action	43	26	69	63	6
Shared values	44	30	74	67	7
Greater purpose	47	30	77	72	5
Meaningful work	44	33	77	68	9
Opportunities to address social problems	44	26	70	64	6
CEO speaks up on issues	39	19	58	57	1
Listens to employee objections	38	20	58	51	7

2019 Edelman Trust Barometer. 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; code 1, very important I would never work for an organization that lacked this characteristic; code 2, important (The pay or other benefits would have to be significantly higher than my other options to compensate for this not being a characteristic of the organization). Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). EMP_VAL. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Malaysia.



EMPLOYEE EXPECTATIONS ACROSS DEMOGRAPHICS

By age	18-34					35-54					55+				
	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap
Job Opportunity	49	35	84	69	15	44	40	84	70	14	41	34	75	62	13
Personal Empowerment	46	30	76	69	7	45	34	79	67	12	38	37	75	59	16
Shared Action	45	25	70	66	4	42	28	70	63	7	32	29	61	53	8

By gender	Men					Women				
	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap	Strong expectation	Deal breaker	Total expectation	Performance	Performance gap
Job Opportunity	45	39	84	71	13	47	36	83	68	15
Personal Empowerment	45	33	78	68	10	44	32	76	67	9
Shared Action	43	28	71	65	6	43	25	68	62	6

2019 Edelman Trust Barometer. 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; code 1, very important I would never work for an organization that lacked this characteristic); code 2, important (The pay or other benefits would have to be significantly higher than my other options to compensate for this not being a characteristic of the organization). Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). EMP_VAL. Thinking about your current employer, to what extent do you agree with the following statements? 9-point scale; top 4 box, agree. Question asked of those who are an employee, but do not run their own business (Q43/1 AND NOT Q28/7). General population employees, Malaysia, by age and gender.

