



2018 Edelman Trust Barometer California Supplement



#TrustBarometer

Methodology | 2018 Edelman Trust Barometer California Supplement



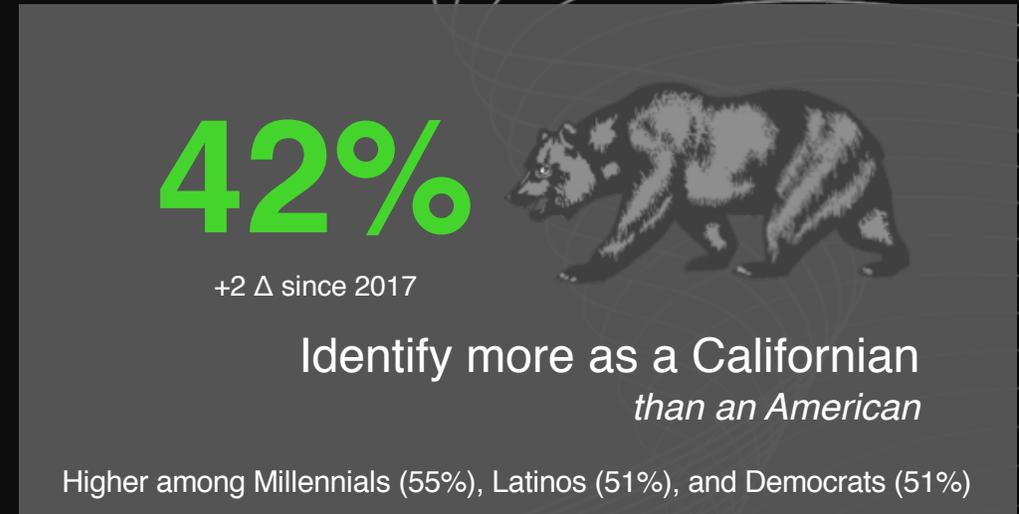
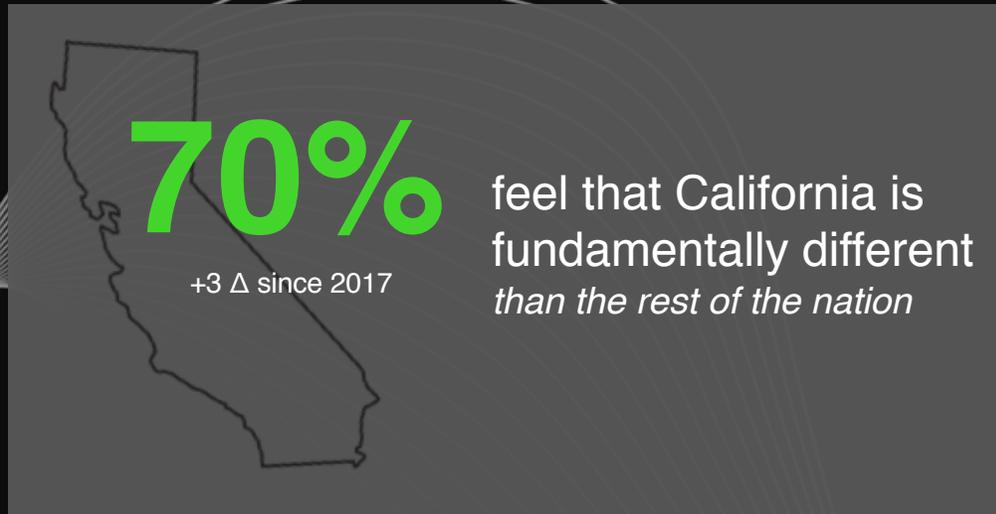
California Regions Surveyed	
 San Francisco Bay Area	N: 500 MOE: $\pm 4.4\%$
 LA Area	N: 500 MOE: $\pm 4.4\%$
 Rest of State	N: 502 MOE: $\pm 4.4\%$
General Population Total: 1,502; MOE: $\pm 2.5\%$	

Other groups	
 Informed Public	N: 328; MOE: $\pm 5.4\%$

*Edelman Intelligence conducted an online statewide survey of 1,702 California residents, with 1,502 General Population respondents and an oversample of 200 Informed Public; in addition, 128 respondents from the General Population sample qualified as Informed Public, for a total of 328 Informed Public respondents. The general population results were weighted to the Census to be representative of the CA adult population.

*Informed Public definition: top household income, college educated, significant media consumption. Includes General Population and Oversample members meeting these criteria

Californians See Themselves as an Outlier With Unique Identity

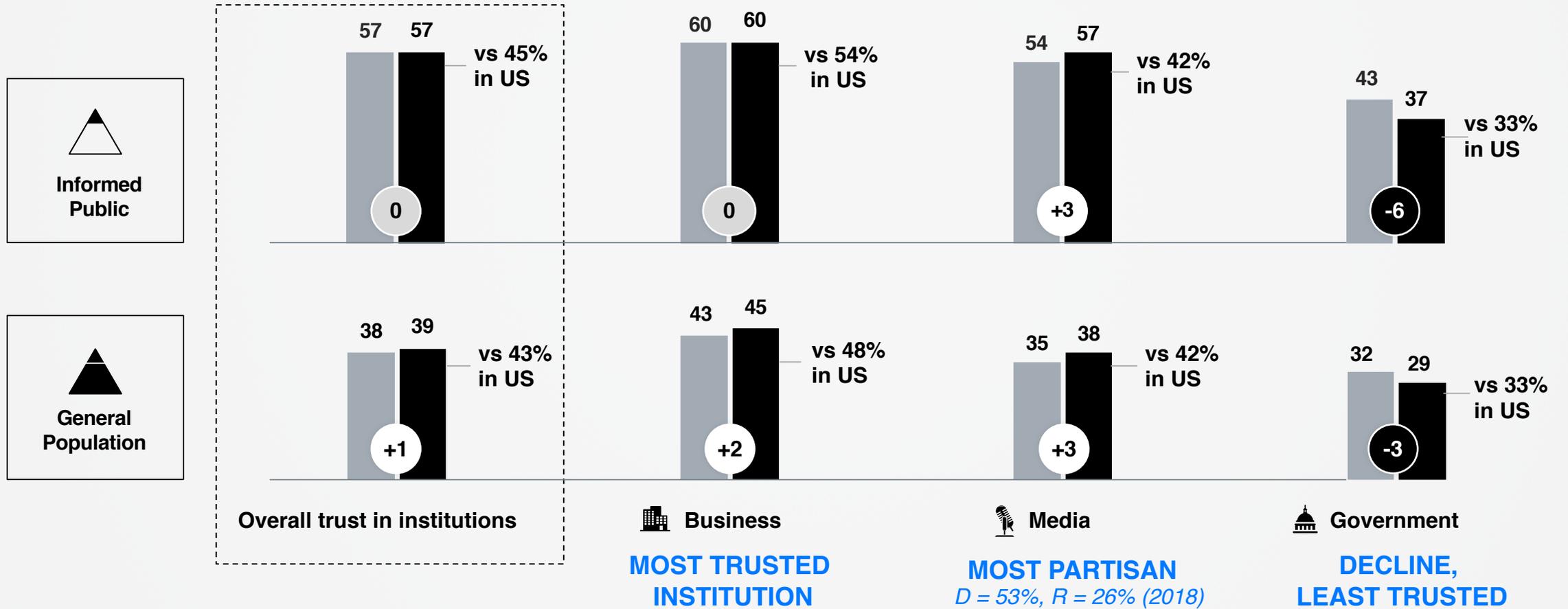


QN65_3: For each, please select which statement is closer to your view: California is fundamentally different than the rest of the nation or California is fundamentally the same as the rest of the nation. General Population, CA
QN64: Do you more strongly consider yourself...? A Californian or An American. General Population, CA



California Has Always Been More Anti-establishment, Leaving a Smaller Trust Bubble to Burst

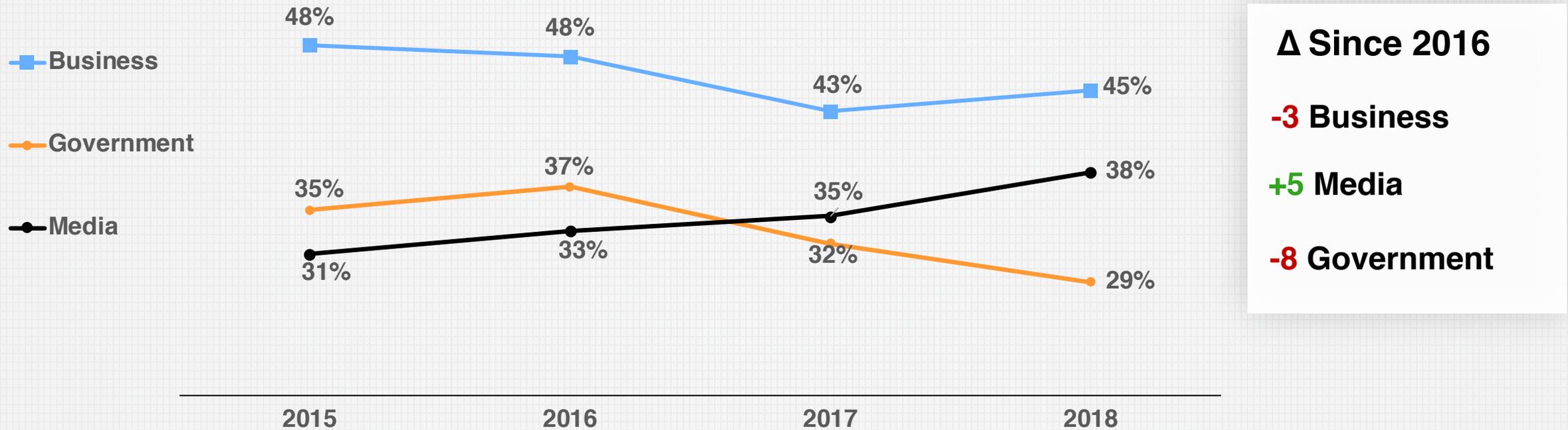
Percent trust in each institution, and change from 2017 to 2018, in CA



Q3CA: Below is a list of institutions and people. For each one, please indicate how much you trust that institution or person to do what is right using a 9-point scale where 1 means that you “do not trust them at all” and 9 means that you “trust them a great deal”. General Population and Informed Public, CA. Shown %Trust 6-9 Overall is the average trust (6-9) of Government, Business, Media, and NGOs.

Government Trust Down Since Trump Was Inaugurated, But Increased Faith in Media

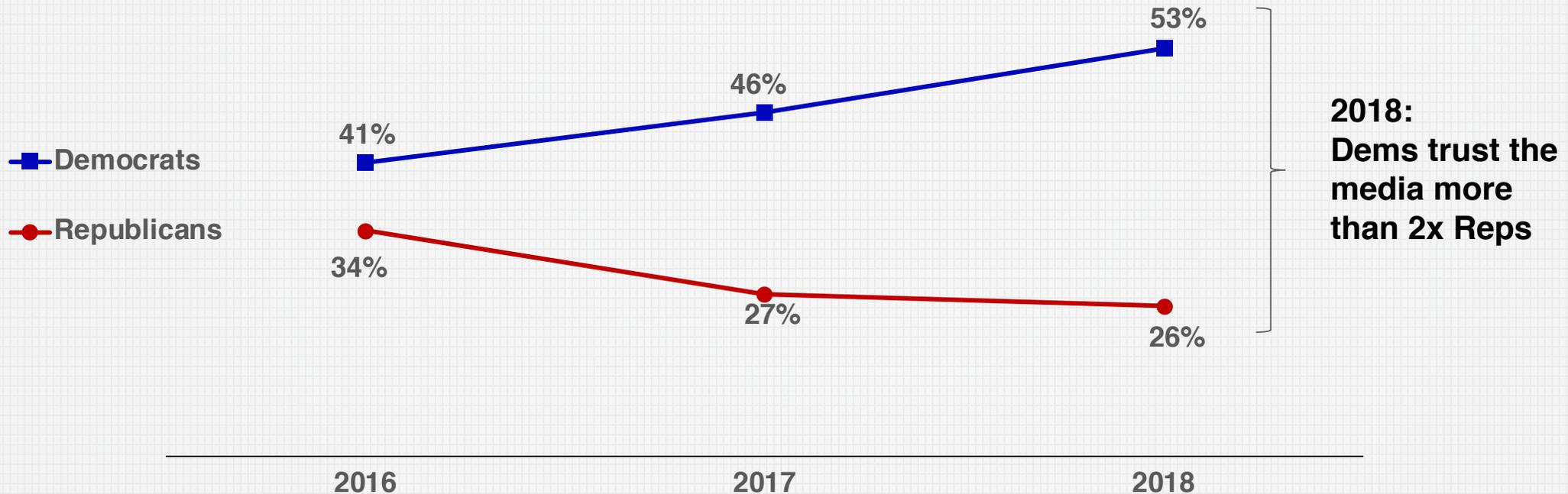
Percent trust in each institution, 2015 to 2018, among General Population



Q3CA: Below is a list of institutions and people. For each one, please indicate how much you trust that institution or person to do what is right using a 9-point scale where 1 means that you “do not trust them at all” and 9 means that you “trust them a great deal”. General Population, CA

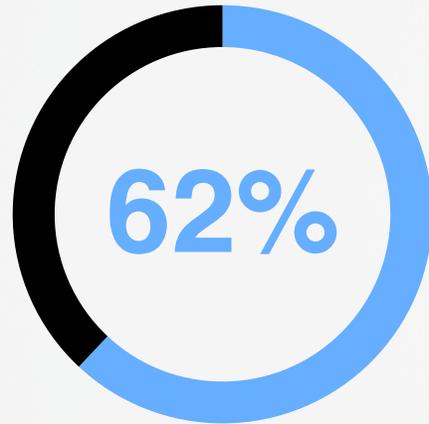
Trust in Media Increasingly Partisan

Trust in the media, by political party affiliation, 2016 to 2018, among General Population



Q3CA: Below is a list of institutions and people. For each one, please indicate how much you trust that institution or person to do what is right using a 9-point scale where 1 means that you “do not trust them at all” and 9 means that you “trust them a great deal”. General Population, CA

2017 Inspired Nearly 2 in 3 to Stand Up for Their Beliefs Rather than be Turned off, Especially Democrats



**Made me want to stand up
for what I believe in**

vs. turned me off from getting involved in the
issues I care about

Those **more inspired** to action:

- Democrats 70%
- Age 50+ 66% (Millennials lowest, at 57%)
- White 69%
- College grads 65%

(No regional differences)

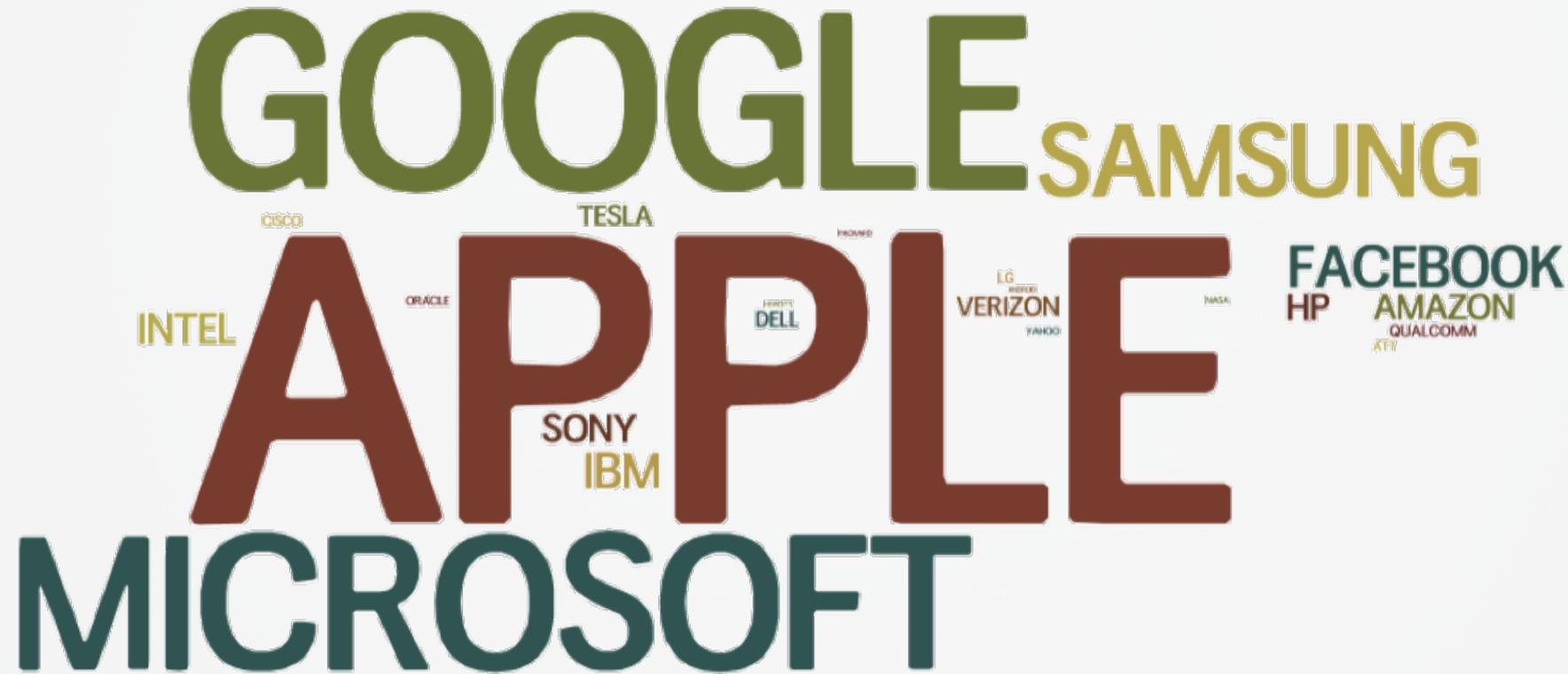


The Technology Industry's Role in Building Trust

Respondents Distinguish Social Media from Tech Companies



Top of Mind “Technology Industry” Companies (Open End)



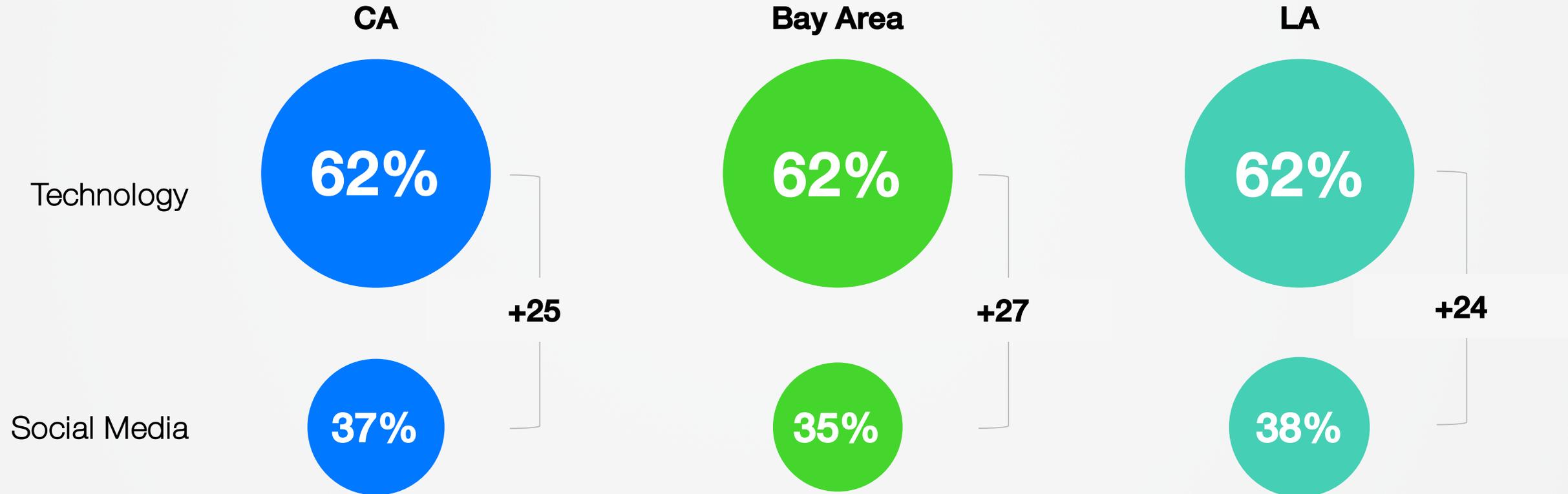
Few cite social media companies when asked to name companies in the technology industry

Q11G_C: Specifically, what companies come to mind when you think of the “technology industry?” Please list up to three companies. (Open end)

Tech Most Trusted Industry Tested, Social Media Significantly Less So



Showing % trust (6-9) in industry



Q11G. Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”. Showing Trust 6-9. General Population, CA

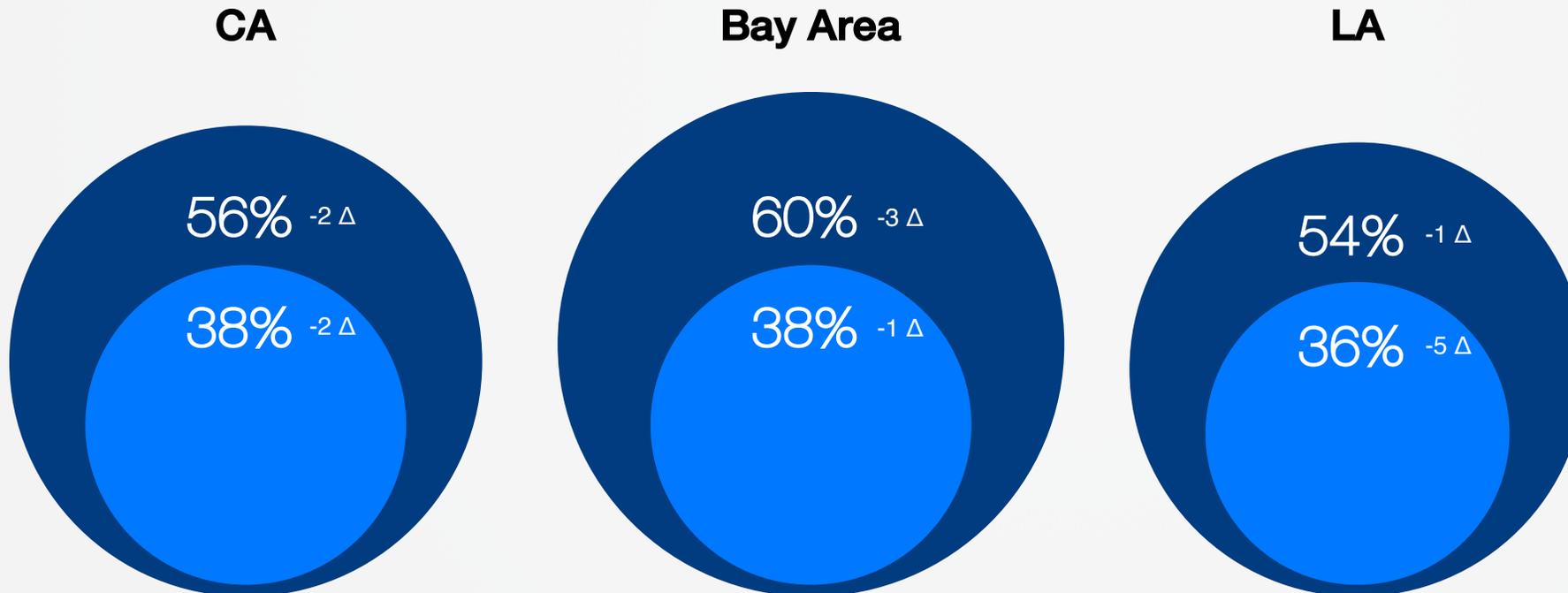
Tech Industry Still Benefits California on Macro level, More so Than Residents on Individual Basis

● **CA overall** has benefitted from the growth of the tech industry

● **I, personally**, have benefitted from the growth of the tech industry

Δ denotes change since 2017

— Note: Higher among males, those making \$100k+, and college grads



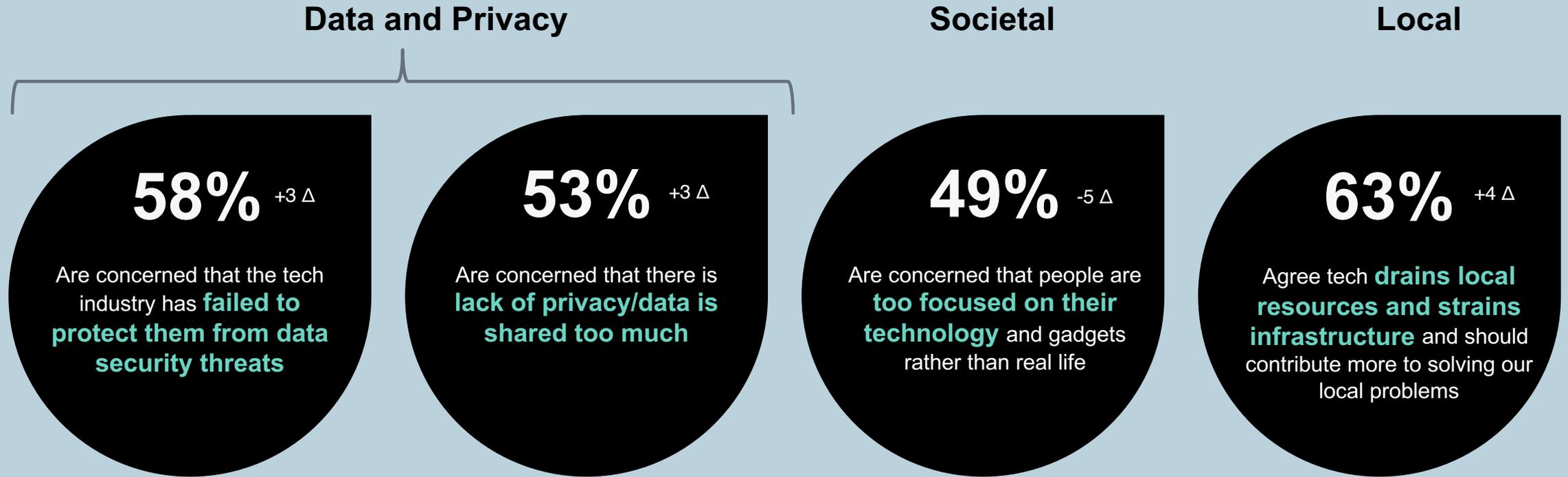
64%
agree that the tech industry makes the wealthy even wealthier, but doesn't really help the rest of California
+5 Δ

QN1. Please indicate whether the growth of the technology sector in California has benefited, harmed, or had no impact on people in each of the following groups. General Population, CA

Q19: Please indicate how much you agree or disagree with the following statements. General Population, CA

Many Concerns about Tech Under the Surface

Δ denotes change since 2017



QN17: What are your top concerns about the technology industry? Please select all that apply. General Population, CA
Q19: Please indicate how much you agree or disagree with the following statements. General Population, CA

Though Innovations Have a Positive Impact, Tech Must Step up on Transparency and Protecting Consumer Data...

Tech industry is performing **well** on....



55%

Developing innovations that have a positive impact on their life and the world

Tech industry is performing **poorly** on....



43%

Protecting consumer data

Just 32% say the tech industry is performing well on being transparent and authentic...

Bay Area even worse: 29%

...while **62%** describe the tech industry as “**secretive**”

Bay Area even more so: 67%

DRV_TEC_GEN: How well do you think the technology industry is performing on the behaviors listed below? Use a 9-point scale where one means they are “performing extremely poorly” and nine means they are “performing extremely well”. General Population, CA, Shown % Well (6-9) and Poorly (1-4)

Q18_C: How well do each of the following terms describe the tech industry? General Population, CA Shown % 1-4

Large and Increasing Appetite for Regulation, Even Within the Home of Innovation

CORPORATE

74% say  +4 Δ since 2017

Technology companies are part of “corporate America” vs “different from”

By region: 73% BA, 71% LA

UNDER-REGULATED

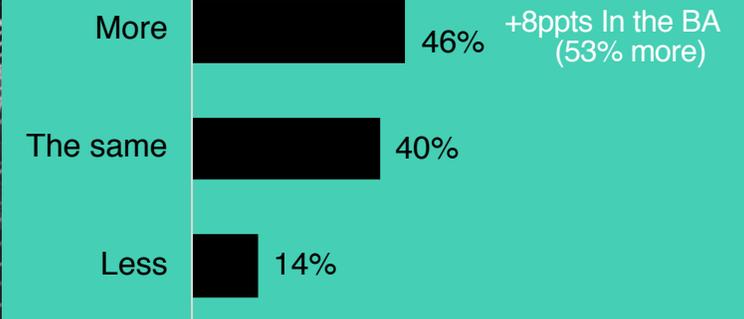
62% say  +6 Δ since 2017

The technology industry has been under-regulated vs “over-regulated”

By region: 67% BA, 61% LA

NEEDS REGULATION

The technology industry should be regulated...



QN43. Which best describes how you would describe technology companies? General Population, CA

QN51. For each, please select which statement is closer to your view. General Population, CA

Q18_A: Moving forward, do you think the tech industry should be more regulated, less regulated, or face about the same level of regulations as it does now?

Q18_B: Do you believe each of the following companies should be more regulated, less regulated, or face about the same level of regulations as they do now?

General Population, CA

Potential For Regulations on Tech if Concerns Not Addressed

Support for regulation in California strong across the board, risk losing backing from shore base

% Supporting Potential Regulations



QN52: Please indicate if you would support or oppose each of the following. General Population, CA

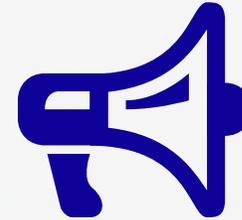
Full text of regulations: Make tech companies financially liable for data breaches and putting customer data at risk, Increase taxes on tech companies who move their manufacturing overseas, Increase taxes on companies who replace workers with automated machines/robots, Reduce the number of skilled workers brought in from other countries to work at American companies, The government should break up tech companies that get too big before they become monopolies

The Time to Act Is Now, Get Ahead and Speak Up



66%

Describe tech industry as
REACTIVE
vs. proactive



79%

Agree that tech companies
have an obligation to
SPEAK OUT AGAINST POLICIES
they think will hurt their employees or
customers

More so for the Bay Area: 83% vs. 77% LA

Those in Bay Area, Tech's Center, Especially Look to It to Address Local Issues



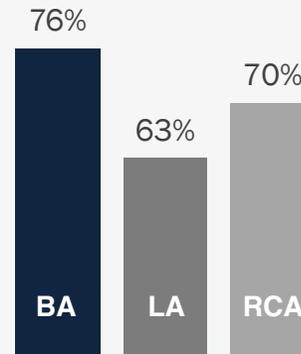
Percent agree (somewhat + strongly)



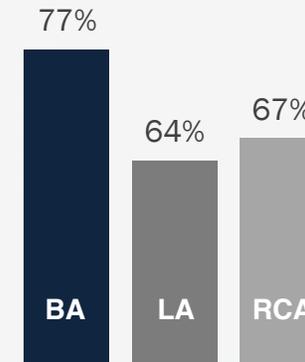
63% +4 Δ since 2017

of BA Residents

Agree tech companies make large profits while draining our local resources and straining our infrastructure. They owe it to the public to contribute more to **solving our local problems**



Tech companies have an obligation to address their impact on **California's traffic**



Tech companies have an obligation to address their impact on **California's housing costs**

Q19: Please indicate how much you agree or disagree with the following statements. General Population, CA
QN54. Please indicate whether you agree or disagree with each of the following. General Population, CA

To Help Build Trust, Tech Sector Needs to “Share the Wealth”

Percent agree (somewhat + strongly)

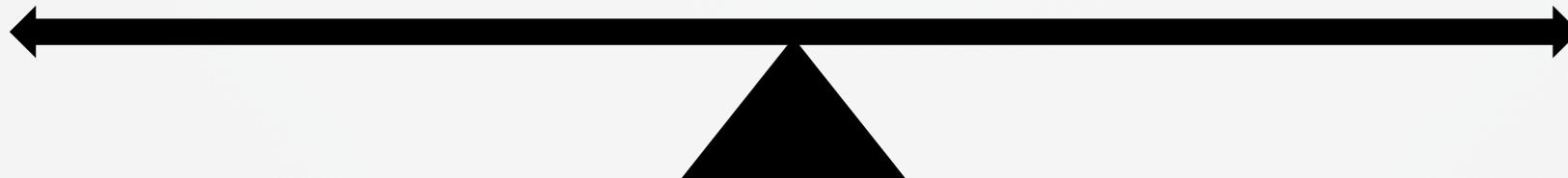
Tech should be doing more to...

BE A GOOD NEIGHBOR

-  **75%** Improve **LOCAL ISSUES**
Bay Area: 83%
-  **68%** Address its impact on **CALIFORNIA'S TRAFFIC**
Bay Area: 76%
-  **68%** Address its impact on California's **HOUSING COSTS**
Bay Area: 77%

LEAD THE WAY

-  **81%** Help ensure our **EDUCATION SYSTEM** keeps pace with necessary emerging skills
Bay Area: 85%
-  **74%** Help regular people affected by **AUTOMATION** or machines/robots
Bay Area: 77%
-  **71%** Improve **SOCIETAL ISSUES**
Bay Area: 75%



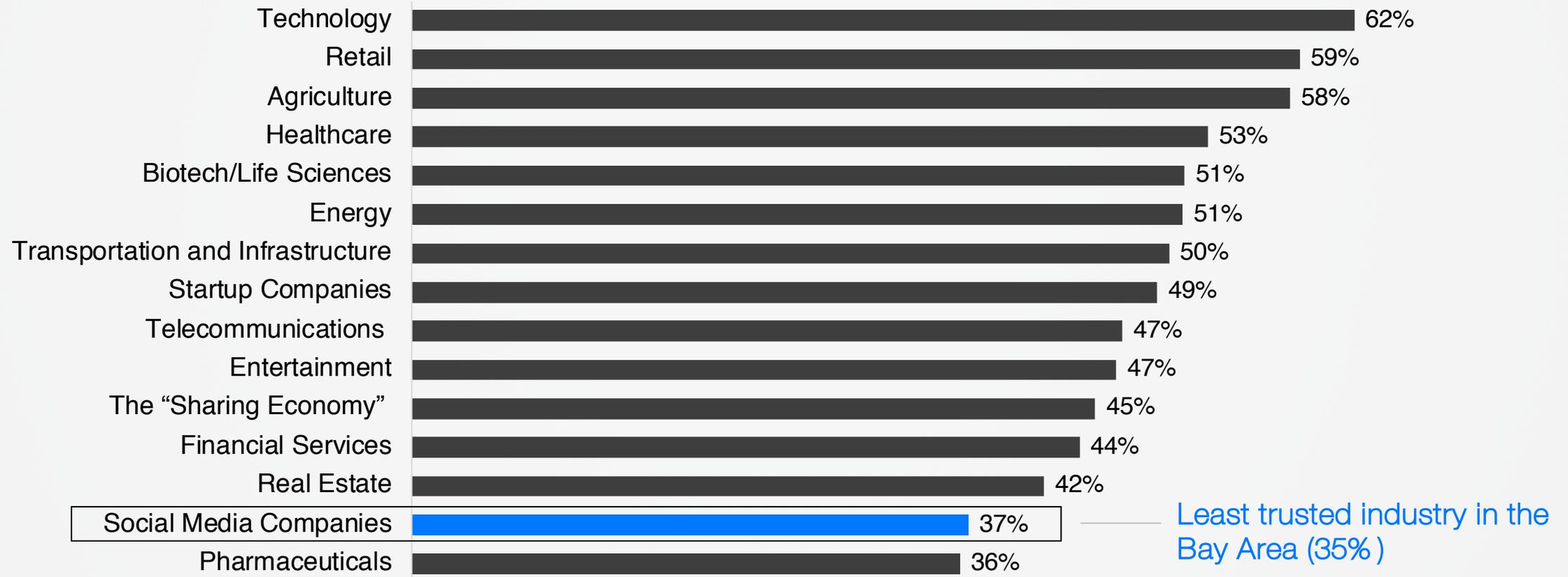
67% feel development in **AI, robots, and automation will cost jobs** for people without college degrees

QN54. Please indicate whether you agree or disagree with each of the following. General Population, CA Full text: Given their impact on the local areas in which they operate, tech companies have an obligation to improve local issues, Tech companies have an obligation to address their impact on California's traffic, Tech companies have an obligation to address their impact on California's housing costs, Technology companies should play a larger role to help ensure that our education system keeps pace with the emerging skills people will need in the future, Technology companies should be doing more to help regular people affected by automation or machines/robots, Given their impact on society, tech companies have an obligation to improve societal issues
Q18_E: Do you think that the tech industry's development of artificial intelligence, robots, and automation will ultimately cost jobs, create more jobs, or break even for each of the following groups?
General Population, CA

The Challenges for Social Media

Social Media Among the Least Trusted Industries

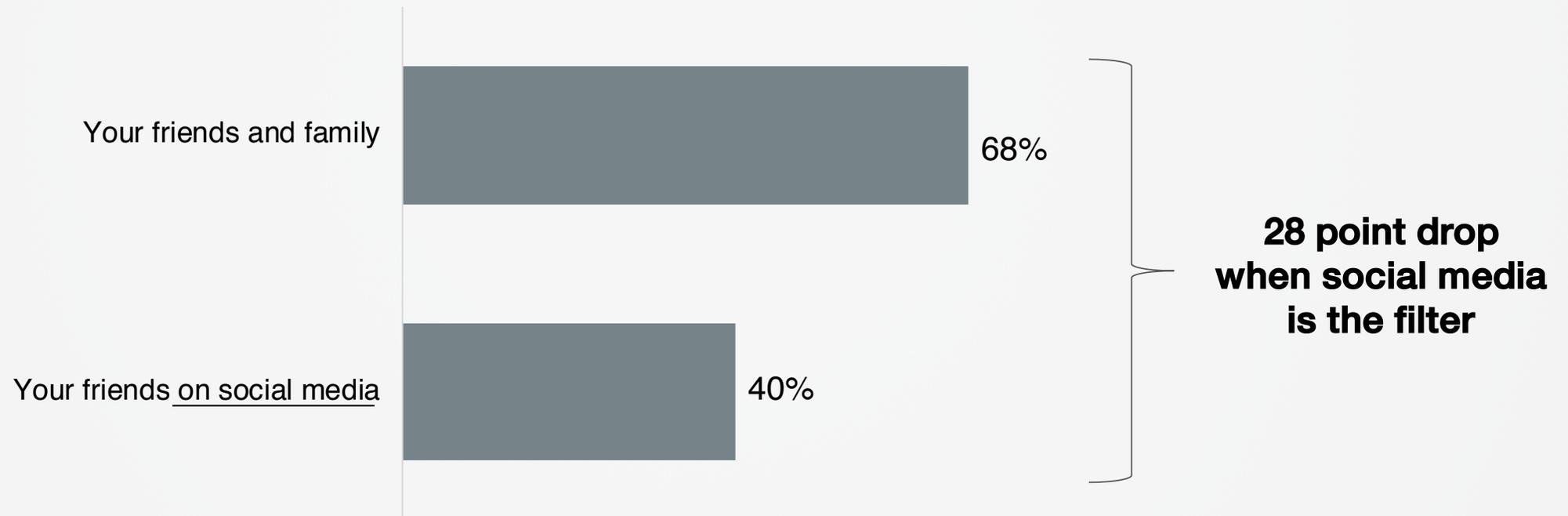
Trust (6-9) in industry to do what is right



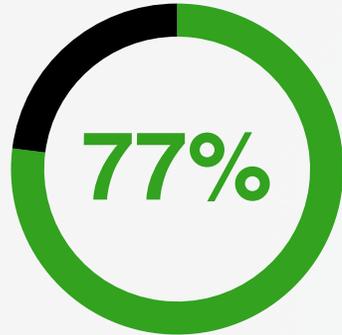
Q11G: Please indicate how much you trust businesses in each of the following industries to do what is right. Again, please use the same 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". Full industry description: Telecommunications (telephone, wireless, internet, and cable service providers), The "sharing economy" (peer to peer businesses like Uber, Lyft, and Airbnb, which are built on individuals sharing or renting unused resources to other individuals); Retail (including both stores with physical locations and online-only retailers). General Population, CA

Even Online Connections Through Social Media are Less Trusted

How much do you trust the news and information from...?
% Trust (6-9)

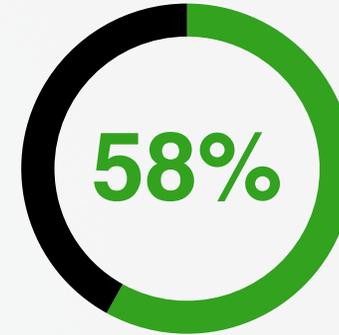


More Than 3 in 4 Blame Social Media for the Problem of Fake News



Social media is to blame for fake news

Almost on par with “People writing it” (86%) and “People sharing it” (80%)



Social media spreads misinformation

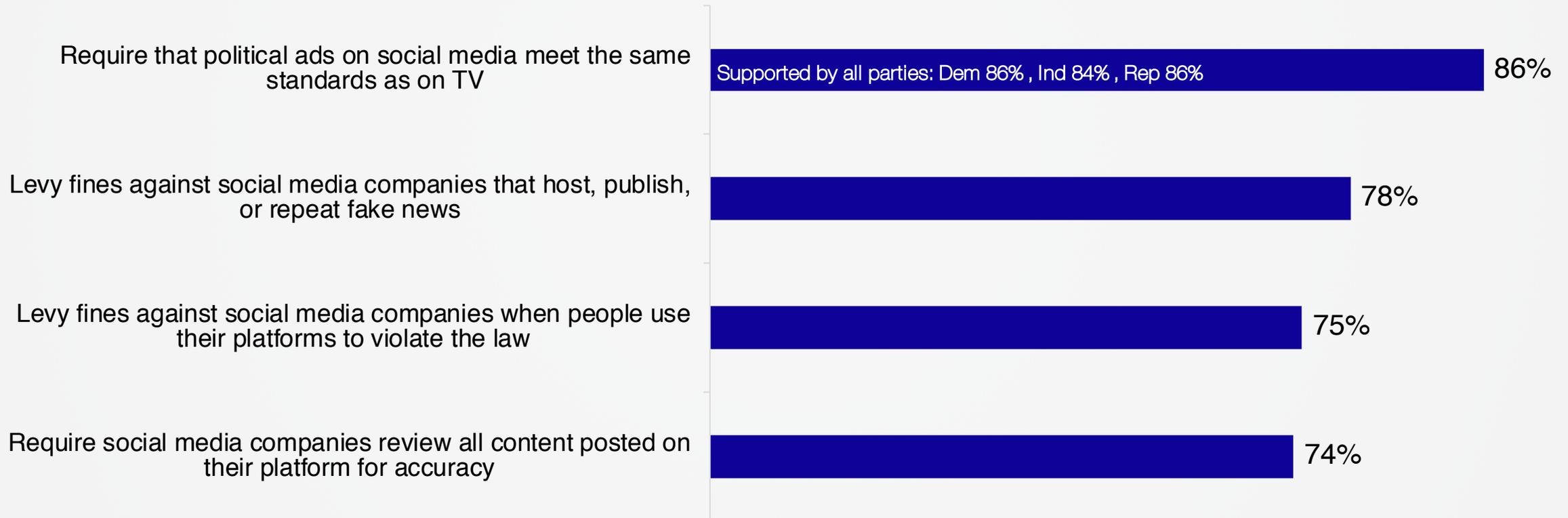
vs 42% Social media helps people become more informed on news and issues

Q751B: Assuming that the term “fake news” refers to completely false information, how much blame do you give to each of the following groups for the problem of fake news? Social media companies for facilitating its spread. Showing % A lot + some. General Population, CA
Total blame (a lot, some, a little) = 94 percent
QN51. For each, please select which statement is closer to your view. General Population, CA

And, an Overwhelming Majority Support Higher Standards and Repercussions for Social Media



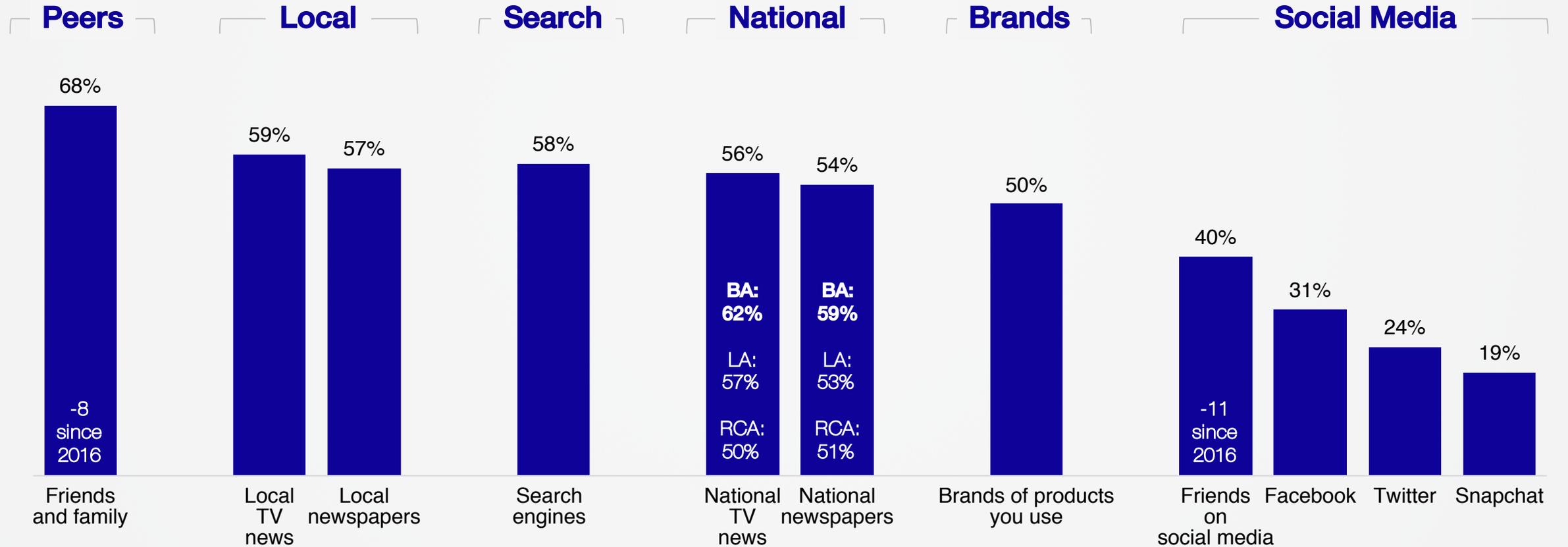
% Support



QN52. There are a number of legal changes that could be considered for the tech industry. Please indicate if you would support or oppose each of the following.
General Population, CA

Social Media Least Trusted for News

% Trust (6-9) News and Info from each source



N22: How much do you trust the news and information you read/hear from each of the following sources? General Population, CA



In the Wake of #metoo

One Third of CA Women Have Been Sexually Harassed at Work

Percentages who have experienced each at work

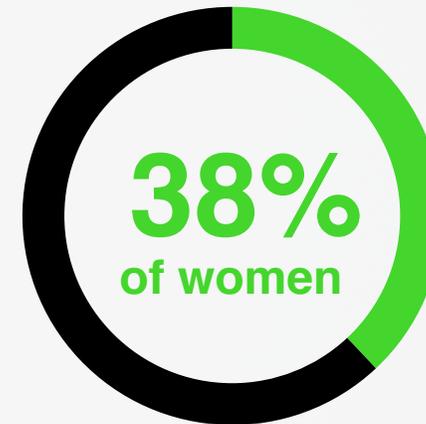
Sexual harassment *at work*



vs. 16% of men

30% of Bay Area women
36% of LA Area women

Unfair treatment because *of gender at work*



vs. 21% of men

...And 49% of college
graduate women

46% of Bay Area women
39% of LA Area women

Q18-I. Have you ever personally experienced sexual harassment at work?

(Sexual harassment can include unwelcome sexual advances, requests for sexual favors, and other verbal or physical harassment of a sexual nature)

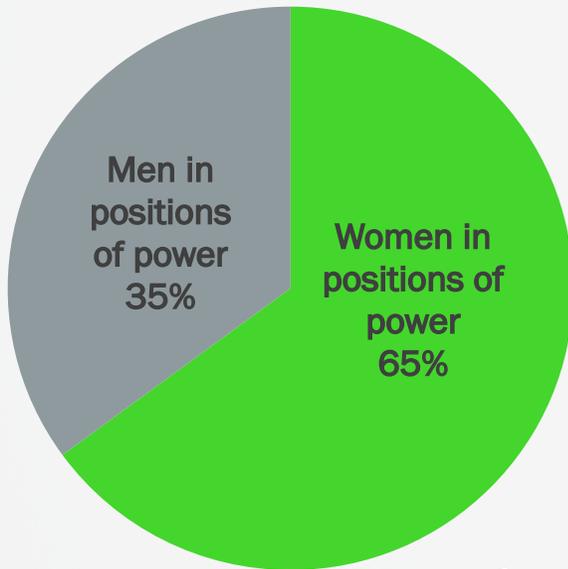
Q18-K. Have you ever experienced a situation at work where you were treated unfairly because of your gender?

(Unfair treatment can include being paid less, interrupted in a meeting, not considered for a promotion, among other things, because of your gender)

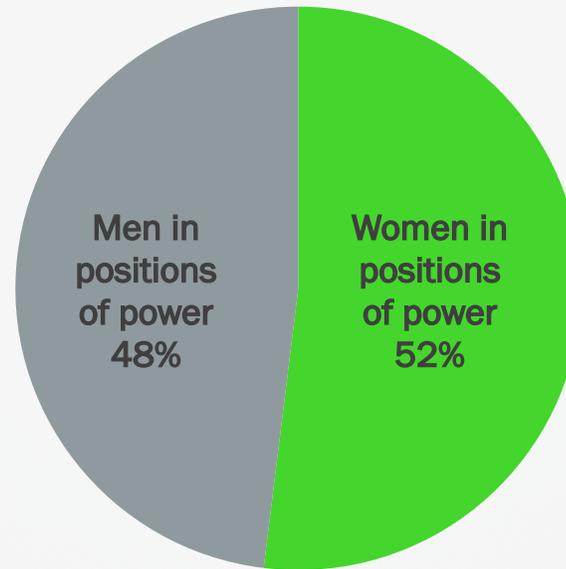
Women in Power Are More Trusted Than Men

Who is more likely to be giving you the truth?

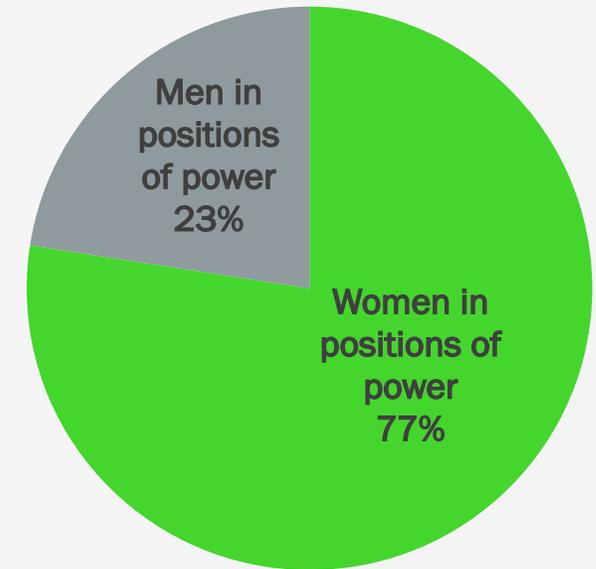
Among All Californians



Among Men



Among Women



Impact of #metoo: women 30 pt advantage, up 7 pts from 2017

Q754: You are about to see a series of two choices. Each choice describes a different source of information, a different format for presenting information, or a different style of communicating information. For each pair, we want you to choose the one that you are more likely to believe is giving you the truth. While we know that some of these choices may not be easy, please do your best to select only one of the two options given--the one that is most likely to be true most often.

Responses From Major Industries Have Been Inadequate so Far

75% say

the **entertainment industry** has not done enough to respond to and deal with sexual harassment in their workplaces

(75% among Women)

By region: 77% BA, 72% LA

67% say

the **media** has not done enough to respond to and deal with sexual harassment in their workplaces

(67% among Women)

By region: 72% BA, 66% LA

66% say

the **tech industry** has not done enough to respond to and deal with sexual harassment in their workplaces

(69% among Women)

By region: 72% BA, 64% LA

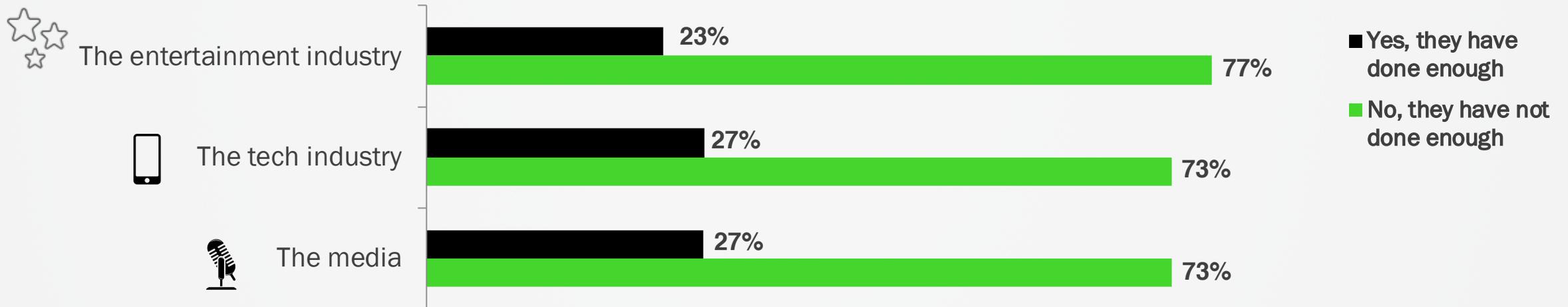
Q18_J: Would you say each of the following industries has done enough or not done enough to respond to and deal with sexual harassment in their workplaces?
General Population, Bay Area, CA

Q18_L: Would you say each of the following industries has done enough or not done enough to respond to and deal with unfair treatment of women in their workplaces based on their gender? General Population, Bay Area, CA

Women are not Seeing The Responses They Want

Percentage among women

Response to unfair treatment because of gender *at work*

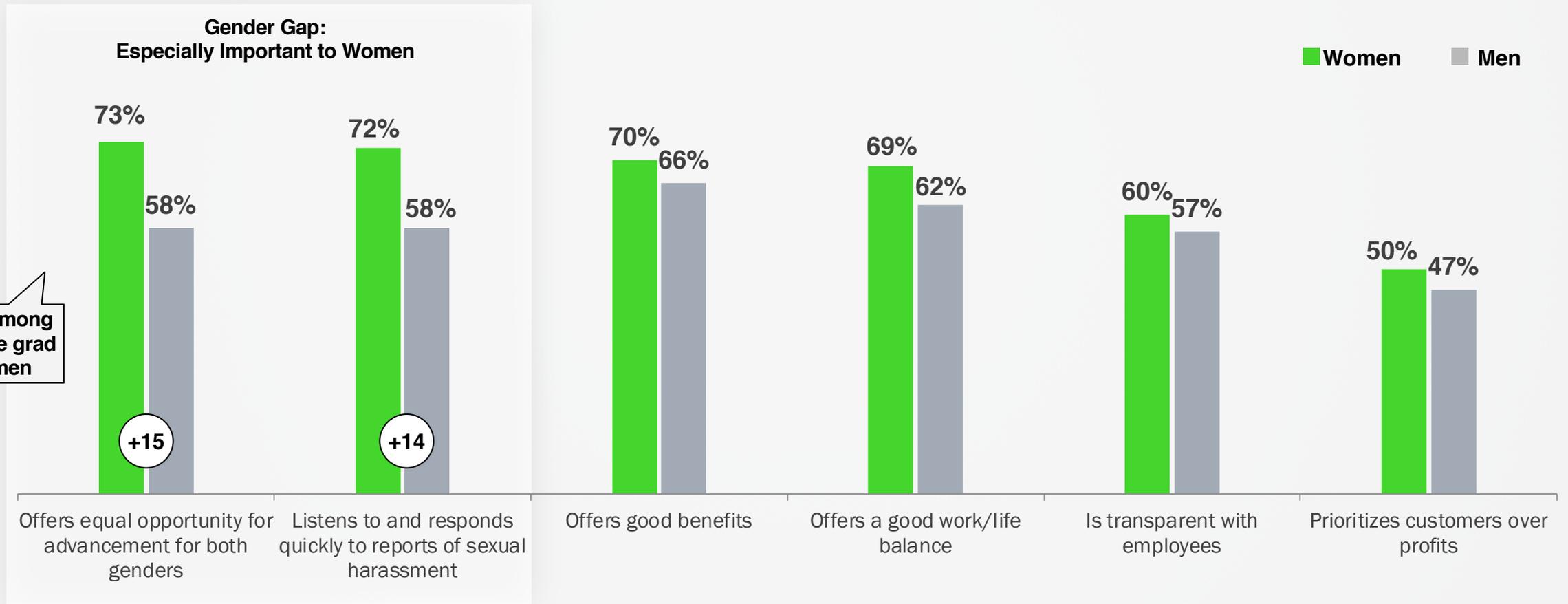


Q18_J: Would you say each of the following industries has done enough or not done enough to respond to and deal with sexual harassment in their workplaces?

Q18_L: Would you say each of the following industries has done enough or not done enough to respond to and deal with unfair treatment of women in their workplaces based on their gender?

How to Attract Female Job Applicants: Demonstrate Commitment to their Success and Fair Treatment

Percent considering each company attribute very important when applying for a job



Q18_H: When thinking about where to apply for a job, how important are each of the following attributes of a company? Very important, somewhat important, not very important, not at all important. General Population, CA



California's Future Outlook

Housing Dominates California Concerns, Far Surpassing Jobs

Percent of respondents who say that each is a very serious problem for California

Housing

The cost and availability of housing

71% *Very serious*

Bay Area 77%, LA 70%

Total serious: 93%

Haves vs. Have Nots

The growing disparity between rich and poor

49% *Very serious*

Bay Area 53%, LA 47%

Total serious: 85%

Living Wage Jobs

Not enough good paying jobs

43% *Very serious*

Bay Area 37%, LA 45%

Total serious: 82%

Nearly Half Considering Leaving California

Showing percent agree (somewhat + strongly)

“I am considering moving away from California because of the high cost of living”

Brain drain potential

49% overall

Bay Area 49%, LA 50%, Rest of state 49%

**58% of
Millennials**

**65% of
Parents**



**+4
since
2017**

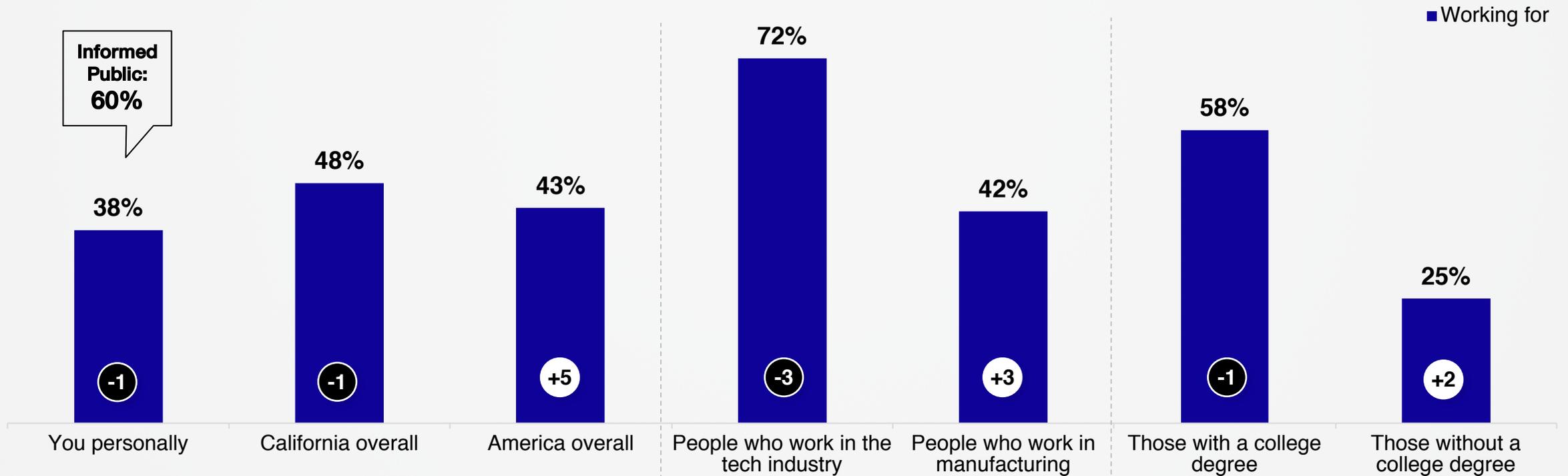
Notable increases since 2017:

- Parents +12
- Bay Area +8
- Millennials +7
- College grads +7
- Renters +6

Most Don't See a System Working for Them

% system is working for (vs. not working for)

74% say the system is biased against regular people and in favor of the rich and powerful



QN67. Compared to the rest of the nation, do you believe each of the following are better or worse in California? General Population, CA

QN39: Who do you believe "the system" is working for (i.e., society and the economy)? Shown: % America overall, % California overall, General Population, CA

They Lack Faith and Are Looking For Business to Lead the Way



68%

Do not have confidence that our current leaders can successfully address our country's challenges
+9 since 2017

Order of Trust in Institutions

Business (45%)

NGOs (42%)

Media (38%)

Government (29%)

Q672_Q690. 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". General Population, CA

Q3CA: Below is a list of institutions and people. For each one, please indicate how much you trust that institution or person to do what is right using a 9-point scale where 1 means that you "do not trust them at all" and 9 means that you "trust them a great deal". General Population and Informed Public, CA. Shown %Trust 6-9