Methodology | 2018 Edelman Trust Barometer California Supplement

*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

70% feel that California is fundamentally different than the rest of the nation

42% Identify more as a Californian than an American

Higher among Millennials (55%), Latinos (51%), and Democrats (51%)
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.

**Overall trust in institutions**
- **Informed Public**: 57 vs 45% in US
  - 2017: 0
  - 2018: 57
  - Change: +57
- **General Population**: 38 vs 43% in US
  - 2017: +1
  - 2018: 39
  - Change: +3

**Most trusted institution**
- **Business**: 60 vs 54% in US
  - 2017: 0
  - 2018: 60
  - Change: +60
- **Media**: 45 vs 48% in US
  - 2017: +2
  - 2018: 45
  - Change: +3
- **Government**: 37 vs 33% in US
  - 2017: -6
  - 2018: 37
  - Change: +3

**Most partisan**
- **D = 53%, R = 26% (2018)**

**Decline, least trusted**
- **vs 43% in US**: 32 vs 29
  - 2017: -3
  - 2018: 29
  - Change: +3

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.

**Most trusted institution**
- **Business**: 60 vs 54% in US
  - 2017: 0
  - 2018: 60
  - Change: +60
- **Media**: 45 vs 48% in US
  - 2017: +2
  - 2018: 45
  - Change: +3
- **Government**: 37 vs 33% in US
  - 2017: -6
  - 2018: 37
  - Change: +3

**Most partisan**
- **D = 53%, R = 26% (2018)**

**Decline, least trusted**
- **vs 43% in US**: 32 vs 29
  - 2017: -3
  - 2018: 29
  - Change: +3
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

Δ Since 2016
-3 Business
+5 Media
-8 Government
Trust in Media Increasingly Partisan

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

2018: Dems trust the media more than 2x Reps

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

Most Americans 
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

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

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

Few cite social media companies when asked to name companies in the technology industry.
Tech Most Trusted Industry Tested, Social Media Significantly Less So

Showing % trust (6-9) in industry

- **Technology**
  - CA: 62%
  - Bay Area: 62%
  - LA: 62%
  - Change from previous year: +25

- **Social Media**
  - CA: 37%
  - Bay Area: 35%
  - LA: 38%
  - Change from previous year: +27

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

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

CA

- **56% -2 Δ** agree that the tech industry makes the wealthy even wealthier, but doesn’t really help the rest of California
- **38% -2 Δ**

Bay Area

- **60% -3 Δ** agree that the tech industry makes the wealthy even wealthier, but doesn’t really help the rest of California
- **38% -1 Δ**

LA

- **54% -1 Δ**
- **36% -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

Δ denotes change since 2017
Many Concerns about Tech Under the Surface

Data and Privacy

- **58%**  
  Are concerned that the tech industry has **failed to protect them from data security threats**

- **53%**  
  Are concerned that there is **lack of privacy/data is shared too much**

Societal

- **49%**  
  Are concerned that people are **too focused on their technology** and gadgets rather than real life

Local

- **63%**  
  Agree tech **drains local resources and strains infrastructure** and should contribute more to solving our local problems

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

74% say +4 Δ since 2017
Technology companies are part of “corporate America” vs “different from”
By region: 73% BA, 71% LA

62% say +6 Δ since 2017
The technology industry has been under-regulated vs “over-regulated”
By region: 67% BA, 61% LA

The technology industry should be regulated...

More 46% +8ppts In the BA (53% more)
The same 40%
Less 14%

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.

<table>
<thead>
<tr>
<th>% Supporting Potential Regulations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financially liable for data breaches</td>
</tr>
<tr>
<td>Universal: Dem 86%, Ind 85%, Rep 89%</td>
</tr>
<tr>
<td>Increase taxes if moving manufacturing overseas</td>
</tr>
<tr>
<td>Increase taxes if replacing workers with automated machines/robots</td>
</tr>
<tr>
<td>Reduce the number of skilled workers brought in from other countries</td>
</tr>
<tr>
<td>Break up tech companies that get too big before they become monopolies</td>
</tr>
</tbody>
</table>
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

Q18_D: Which better describes the tech industry? Reactive to prevent problems or proactive to prevent problems. General Population, CA
QN54: Please indicate whether you agree or disagree with each of the following. General Population, Bay Area, CA
Those in Bay Area, Tech’s Center, Especially Look to It to Address Local Issues

Percent agree (somewhat + strongly)

63% 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:
- BA: 76%
- LA: 63%
- RCA: 70%

Tech companies have an obligation to address their impact on California’s housing costs:
- BA: 77%
- LA: 64%
- RCA: 67%

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%
  - Address its impact on CALIFORNIA’S TRAFFIC
    - Bay Area: 76%
  - 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%
  - Help regular people affected by AUTOMATION or machines/robots
    - Bay Area: 77%
  - 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

- Technology: 62%
- Retail: 59%
- Agriculture: 58%
- Healthcare: 53%
- Biotech/Life Sciences: 51%
- Energy: 51%
- Transportation and Infrastructure: 50%
- Startup Companies: 49%
- Telecommunications: 47%
- Entertainment: 47%
- The “Sharing Economy”: 45%
- Financial Services: 44%
- Real Estate: 42%
- Social Media Companies: 37%
- Pharmaceuticals: 36%

Least trusted industry in the Bay Area (35%)
Even Online Connections Through Social Media are Less Trusted

How much do you trust the news and information from…?

% Trust (6-9)

Your friends and family  
68%

Your friends on social media  
40%

28 point drop when social media is the filter
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

- Require that political ads on social media meet the same standards as on TV: 86% supported (Dem 86%, Ind 84%, Rep 86%)
- Levy fines against social media companies that host, publish, or repeat fake news: 78%
- Levy fines against social media companies when people use their platforms to violate the law: 75%
- Require social media companies review all content posted on their platform for accuracy: 74%

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

<table>
<thead>
<tr>
<th>Source</th>
<th>Peers</th>
<th>Local</th>
<th>Search</th>
<th>National</th>
<th>Brands</th>
<th>Social Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends and family</td>
<td>68%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local TV news</td>
<td>59%</td>
<td>57%</td>
<td>58%</td>
<td>56%</td>
<td>50%</td>
<td>-11 since 2016</td>
</tr>
<tr>
<td>Local newspapers</td>
<td></td>
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<td></td>
<td></td>
<td>31%</td>
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<tr>
<td>Search engines</td>
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<td></td>
<td>24%</td>
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<tr>
<td>National TV news</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>19%</td>
</tr>
<tr>
<td>National newspapers</td>
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<td></td>
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<tr>
<td>Brands of products you use</td>
<td></td>
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</tr>
<tr>
<td>Friends on social media</td>
<td>-8 since 2016</td>
<td></td>
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<tr>
<td>Facebook</td>
<td>40%</td>
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<tr>
<td>Twitter</td>
<td></td>
<td>31%</td>
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<tr>
<td>Snapchat</td>
<td></td>
<td></td>
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</tbody>
</table>

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
- 32% of women
- vs. 16% of men

Unfair treatment because of gender at work
- 38% of women
- vs. 21% of men

...And 49% of college graduate 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)
Who is more likely to be giving you the truth?

Among All Californians

- Women in positions of power: 65%
- Men in positions of power: 35%

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

Among Men

- Men in positions of power: 48%
- Women in positions of power: 52%

Among Women

- Men in positions of power: 23%
- Women in positions of power: 77%

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

- The entertainment industry: 23% yes, 77% no
- The tech industry: 27% yes, 73% no
- The media: 27% yes, 73% no

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Women (%)</th>
<th>Men (%)</th>
<th>Gender Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offers equal opportunity for advancement for both genders</td>
<td>73%</td>
<td>58%</td>
<td>+15</td>
</tr>
<tr>
<td>Listens to and responds quickly to reports of sexual harassment</td>
<td>72%</td>
<td>58%</td>
<td>+14</td>
</tr>
<tr>
<td>Offers good benefits</td>
<td>70%</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>Offers a good work/life balance</td>
<td>69%</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Is transparent with employees</td>
<td>60%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Prioritizes customers over profits</td>
<td>50%</td>
<td>47%</td>
<td></td>
</tr>
</tbody>
</table>

78% among college grad women

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

<table>
<thead>
<tr>
<th>Issue</th>
<th>Bay Area</th>
<th>LA</th>
<th>Total Serious</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing</td>
<td>71%</td>
<td>70%</td>
<td>93%</td>
</tr>
<tr>
<td>Haves vs. Have Nots</td>
<td>49%</td>
<td>47%</td>
<td>85%</td>
</tr>
<tr>
<td>Living Wage Jobs</td>
<td>43%</td>
<td>45%</td>
<td>82%</td>
</tr>
</tbody>
</table>

The cost and availability of housing

The growing disparity between rich and poor

Not enough good paying jobs

Q18_P. How serious of a problem for California are each of the following issues? Very serious, somewhat serious, not very serious, not at all serious

General Population, CA
Nearly Half Considering Leaving California

Showing percent agree (somewhat + strongly)

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

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

Notable increases since 2017:
• Parents +12
• Bay Area +8
• Millennials +7
• College grads +7
• Renters +6

58% of Millennials
65% of Parents

QN66. Please indicate whether you agree or disagree with each of the following. General Population, CA
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

Informed Public: 60%

-1  48%  43%  72%  58%  25%
You personally  California overall  America overall  People who work in the tech industry  People who work in manufacturing  Those with a college degree  Those without a college degree

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

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

68%

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

Order of Trust in Institutions

- Business (45%)
- NGOs (42%)
- Media (38%)
- Government (29%)