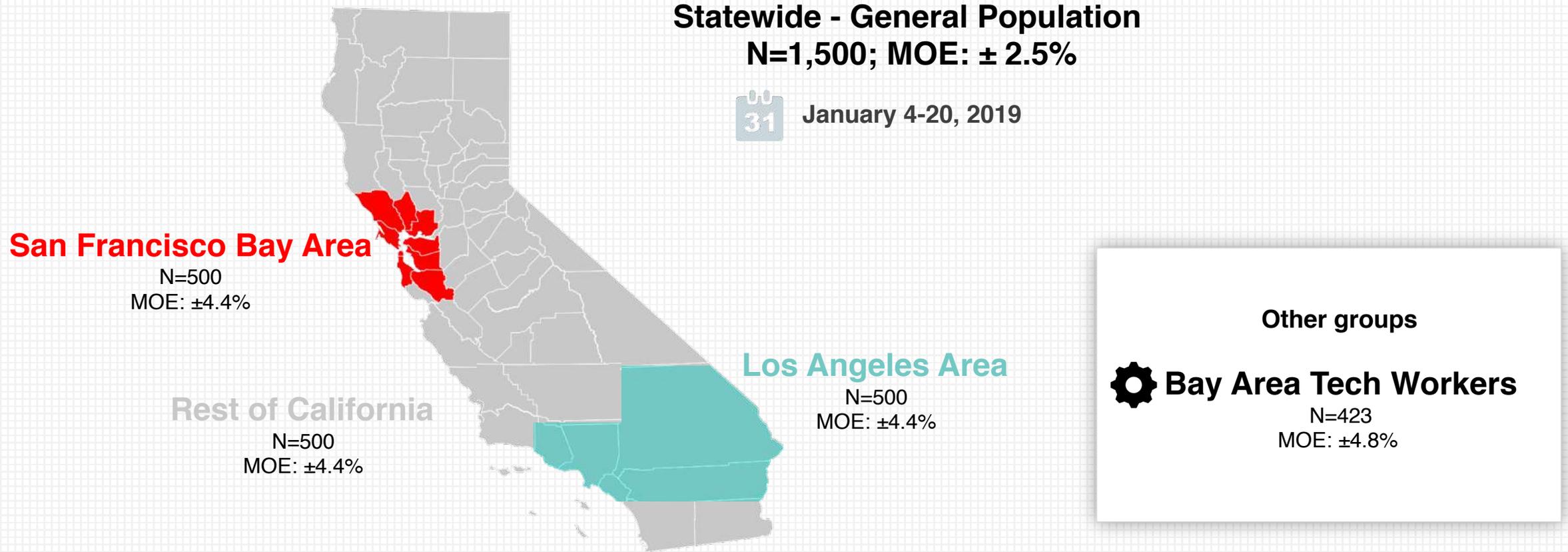


METHODOLOGY | 2019 EDELMAN TRUST BAROMETER SPECIAL REPORT: CALIFORNIA



*Edelman Intelligence conducted an online statewide survey of 1,900 California residents, with 1,500 General Population respondents and an oversample of 400 Bay Area Tech Workers. The statewide general population results were weighted to the Census to be representative of the CA adult population.

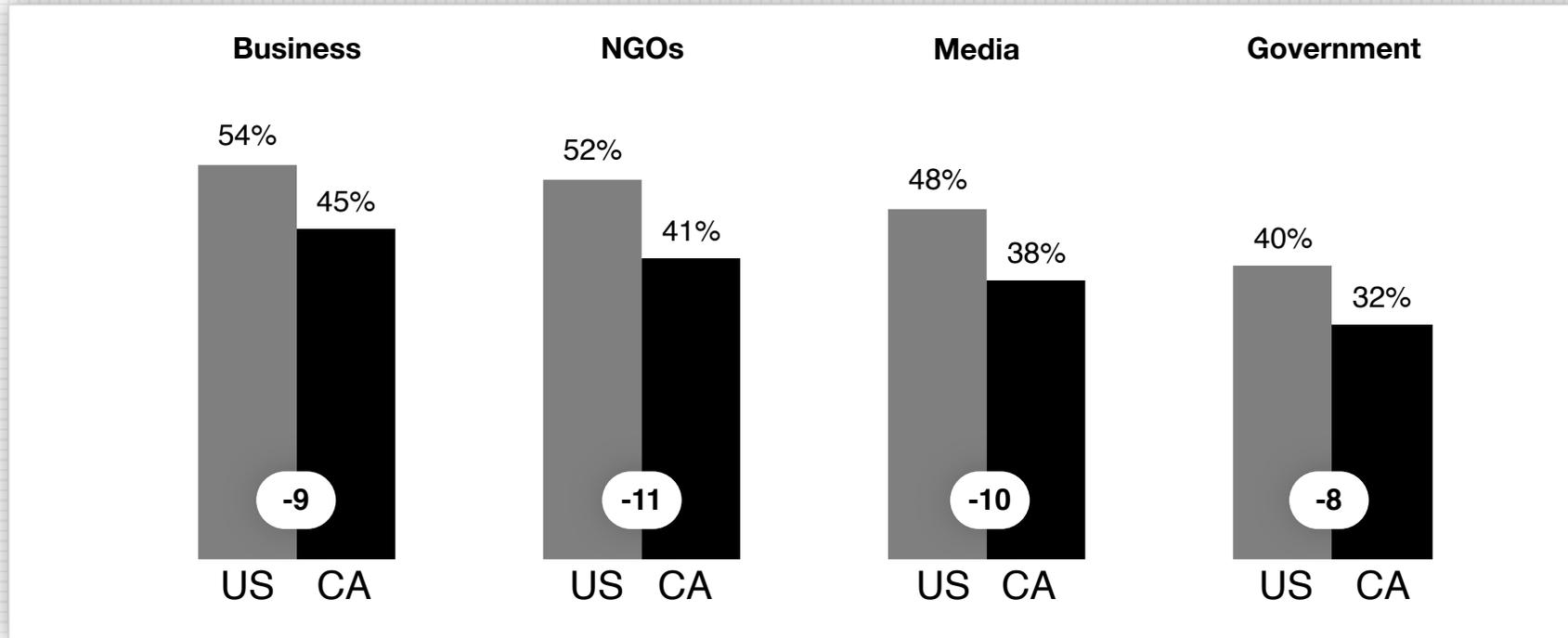
23 respondents from the General Population sample qualified as Bay Area Tech Workers, for a total of 423 BATW respondents. Bay Area Tech Worker defined as: reside in Bay Area county, work for a company in the technology industry (self-selected). Includes General Population and Oversample members meeting these criteria

Some of the California data is compared to the data from the Global Trust Barometer among US General Population: (N=500) +/- 4.4%

CALIFORNIANS ARE SKEPTICS

Percent trust in each institution

Trust gap



Average Trust in CA: 39%

-10 compared to US

Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

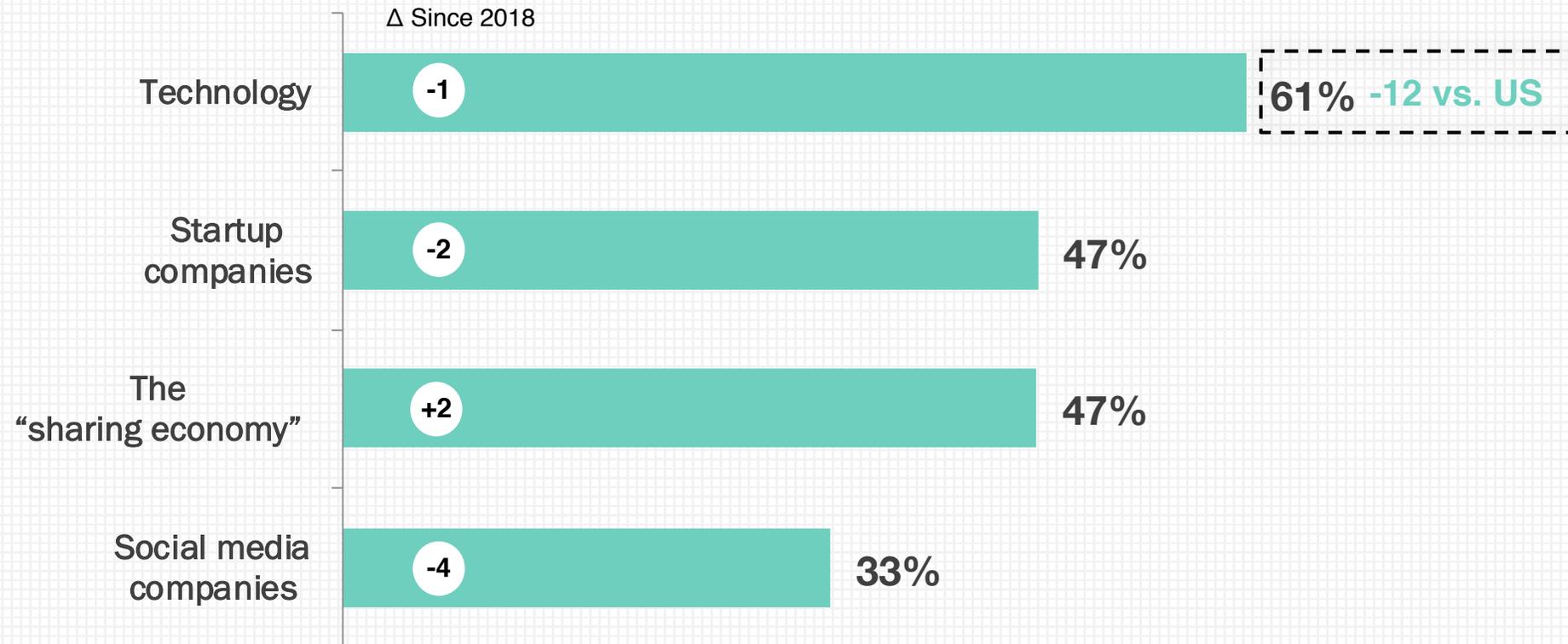
Q3CA: Below is a list of institutions and people. For each one, please indicate how much you trust that institution or person to do what is right using a 9-point scale where 1 means that you “do not trust them at all” and 9 means that you “trust them a great deal.” Showing % Trust 6-9. General Population,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



“Average trust” is the average trust of the 4 institutions.

CALIFORNIANS ARE AMBIVALENT TOWARD THEIR ENGINES OF PROSPERITY, EVEN AS THE ENVY OF OTHERS

Percent trust in each sector



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

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." (Trust 6-9). General Population, CA

GOLDEN STATE WORRIERS

GOLDEN STATE WORRIERS: CALIFORNIANS SEE CALIFORNIA PAST ITS PRIME



62%

feel that the **best days of living in California** are behind

vs. are ahead



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)
Q19_N: Do you feel that the best days of living in California are ahead or behind? General Population, CA

LOCAL ISSUES LOOM LARGE: CALIFORNIANS SEE A SERIOUS HOUSING CRISIS

72% of Californians say **cost and availability of housing** is a **very serious issue** for California
76% Bay Area

62% of Californians say **homelessness** is a **very serious issue** for California
62% Bay Area

53% of Californians are **considering moving out of state** because of the high cost of living
+4 since 2018

Millennials are especially at risk of leaving CA (63%)

If San Francisco Is So Great, Why Is Everyone I Love Leaving?

We are witnessing two migrations. One is a continuation of the California dream. The other no one talks about, though it affects nearly everyone I know.

 Diana Helmuth [Follow](#)
Nov 5, 2018 · 13 min read ★



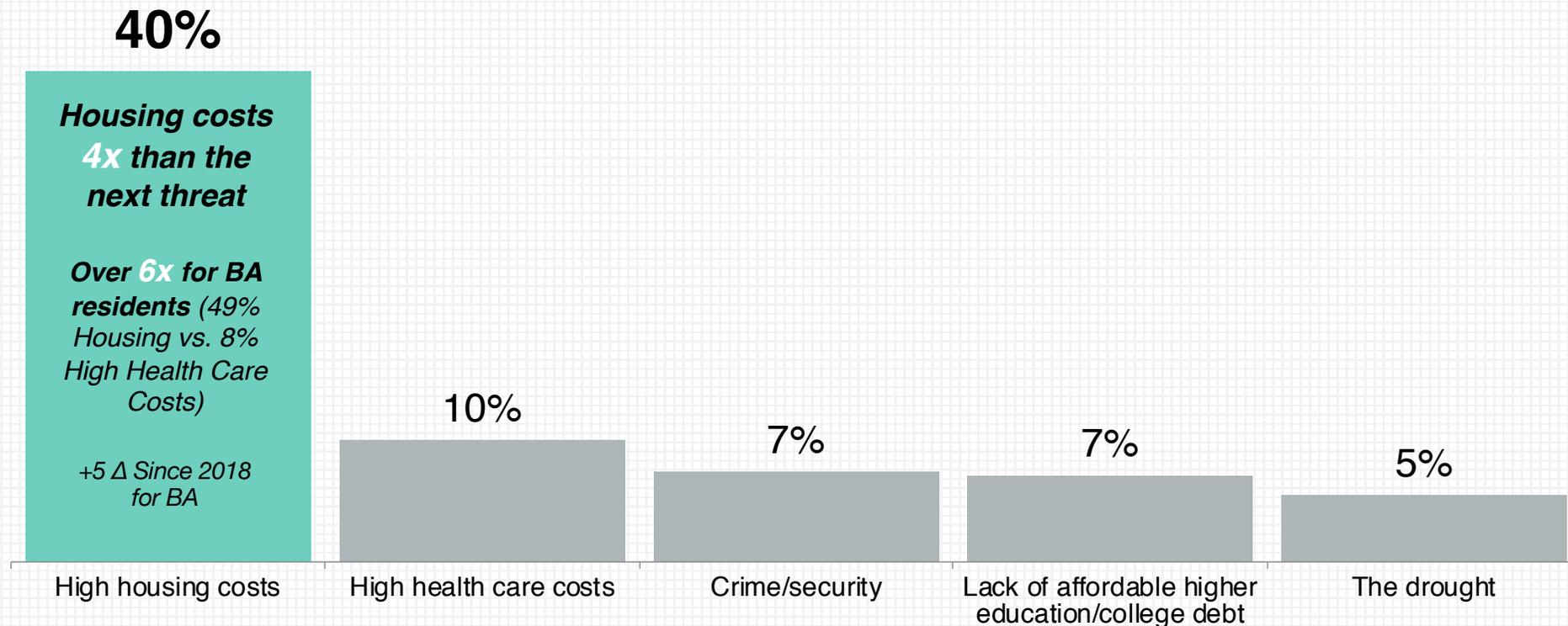
Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

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

QN66: Please indicate whether you agree or disagree with the following. I am considering moving away from California because of the high cost of living. General Population, CA

HOUSING CRISIS THREATENS CALIFORNIA'S ECONOMY

% who chose each issue as most likely to hold back CA's economy and hamper growth



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

Q8CA_M. Which of the following do you think is the most likely to hold back California's economy and hamper growth?

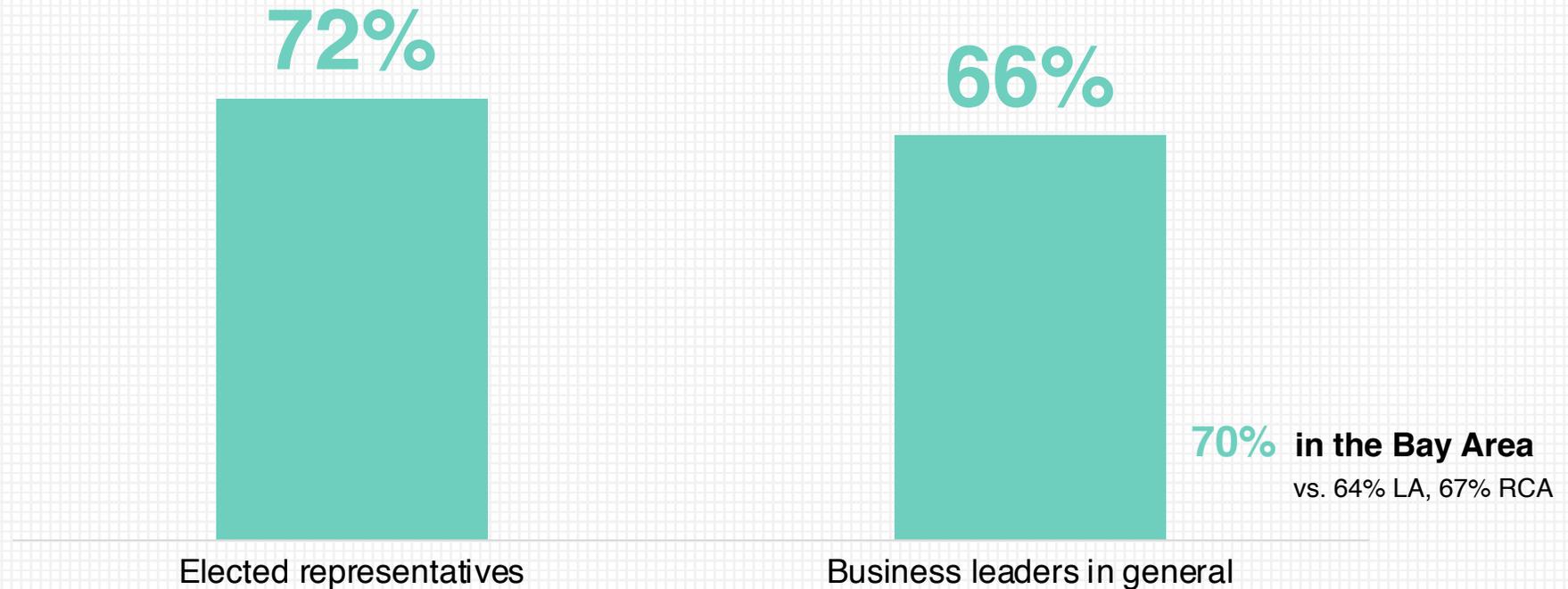
Not shown: failing schools (5%), transportation system (including roads) is overloaded and stretched too thin (4%), not enough trained workers (3%), lack of innovation by businesses (2%), problems in agriculture/inability to grow food (2%), other, don't know. General Population, CA



LOCAL BUSINESS' ROLE IN IMPROVING CALIFORNIA

EVERYONE SHOULD BE DOING MORE TO IMPROVE CALIFORNIA – INCLUDING BUSINESS LEADERS

% feel that groups should be doing more to improve California

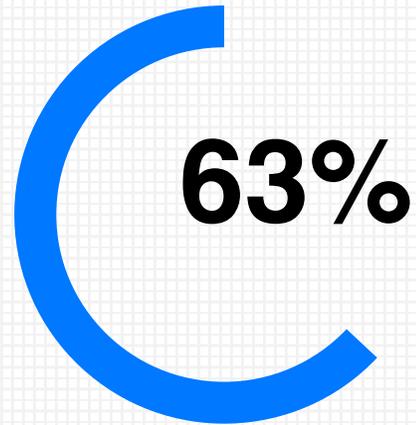


Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

Q19_D: For the following groups, what is your opinion when it comes to the role and responsibility they should be taking in improving California? They should be doing...much more, somewhat more, somewhat less, much less, or about the same to improve California. General Population, CA. Showing % much more + somewhat more.



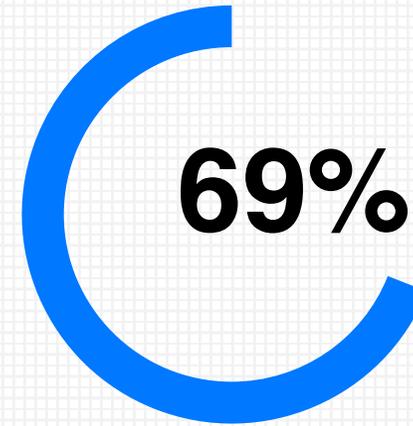
BUSINESS HAS AN OBLIGATION TO HELP SOLVE LOCAL ISSUES, AND CAN DO SO WITHOUT SACRIFICING PROFIT



Agree businesses 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.



68% of the Bay Area
vs. 62% in LA



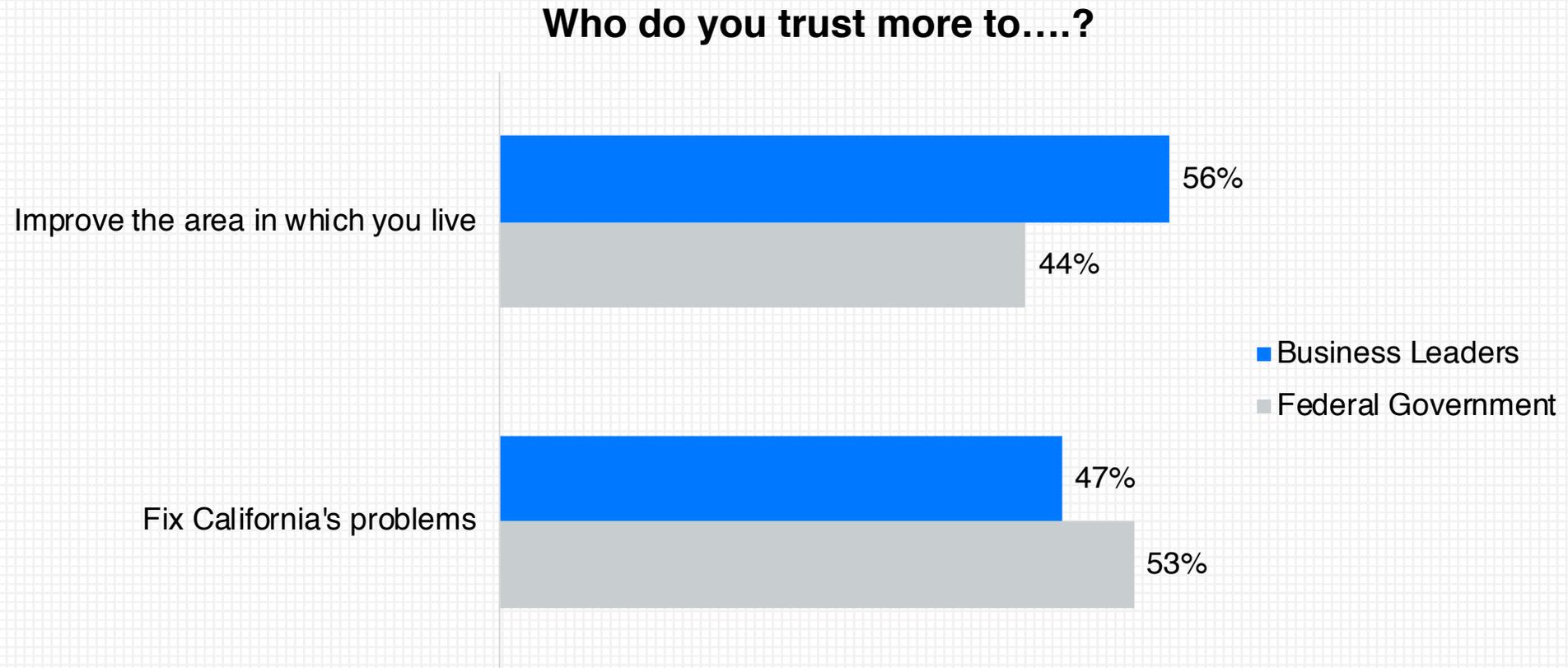
Agree that a company can take specific actions that both increase profits and improve the economic and social conditions in the communities where it operates.



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

Q19: Please indicate how much you agree or disagree with the following statements... 1 to 9 scale where 1 means strongly disagree and 9 means strongly agree. Showing % agree 6-9. General Population, CA

BUSINESS HAS LICENSE TO TACKLE PROBLEMS AND IMPROVE CA



TAKING RESPONSIBILITY AND ACTION BUILDS TRUST

% trust a company more if they...

ACCEPT RESPONSIBILITY

58%

62% BA
vs. 58% LA

Communicates transparently about its role in local issues (such as traffic, housing and environmental impact) and societal issues (such as income inequality and diversity & inclusion)

DO SOMETHING ABOUT IT

59%

Donates money, time and/or other resources to help address issues in its own community



TECH'S ROLE IN IMPROVING CALIFORNIA

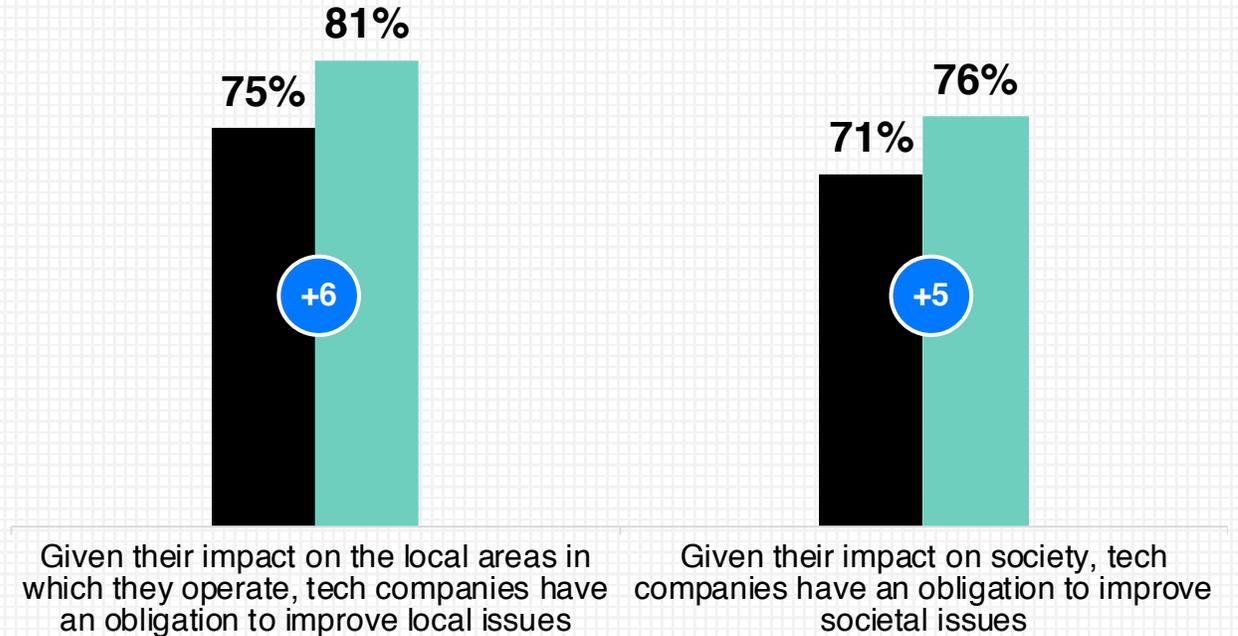
EXPECTATIONS FOR TECH TO SOLVE LOCAL AND SOCIETAL ISSUES ESPECIALLY HIGH AND GROWING



EXPECTATIONS FOR TECH GROWING...

Showing % Agree (Strongly + Somewhat)

■ 2018 ■ 2019



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

Q19_D: For the following groups, what is your opinion when it comes to the role and responsibility they should be taking in improving California? They should be doing...

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

TECH PARTICULARLY RESPONSIBLE TO IMPROVE PROBLEMS IT IS SEEN AS CREATING

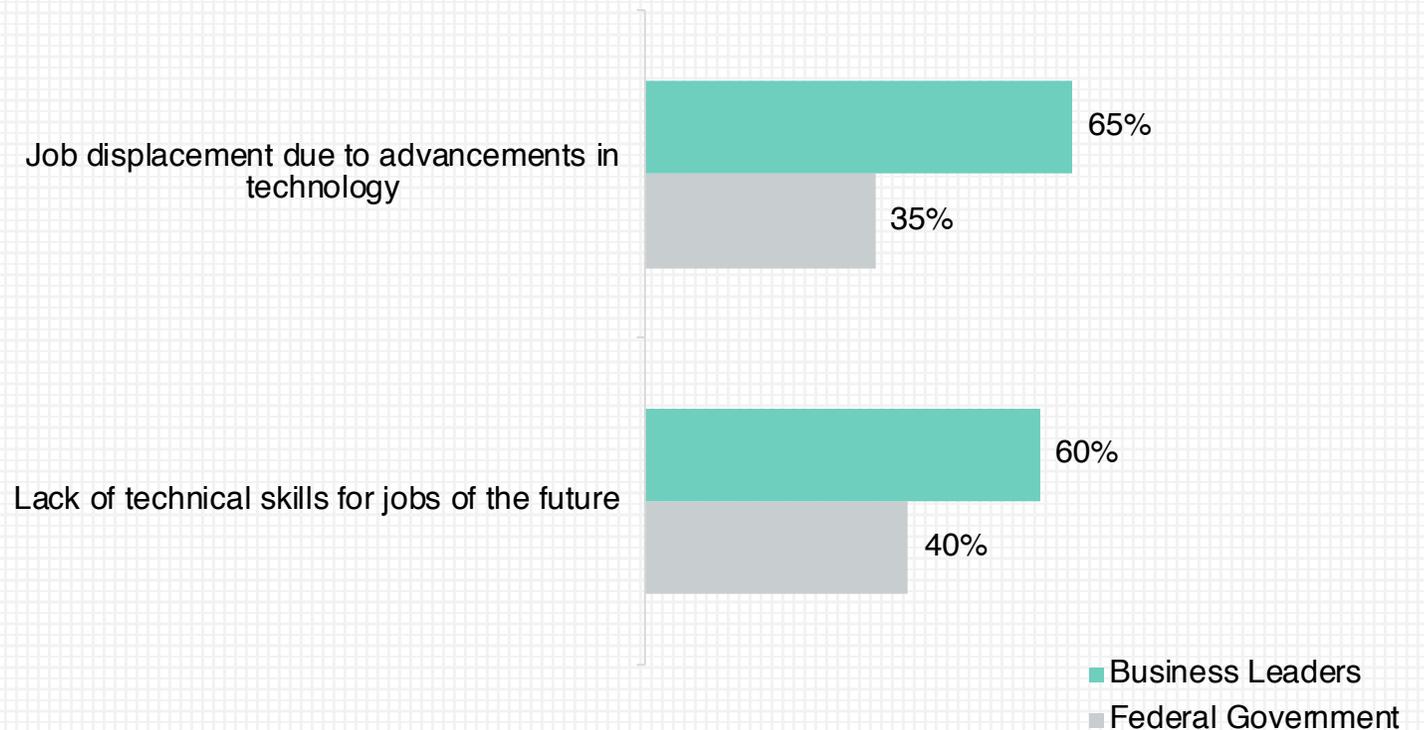
Showing % Agree (6-9)

**JOB CREATION BY TECH
PERCEIVED TO BE LOW**

**ONLY
44%**

of Californians feel that **technology will create more jobs** than it will kill

Responsibility to prepare Californians for future issues...



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

Q19_F. Whose responsibility is it to ensure that people in California are prepared for the following potential issues in the future? General Population, CA

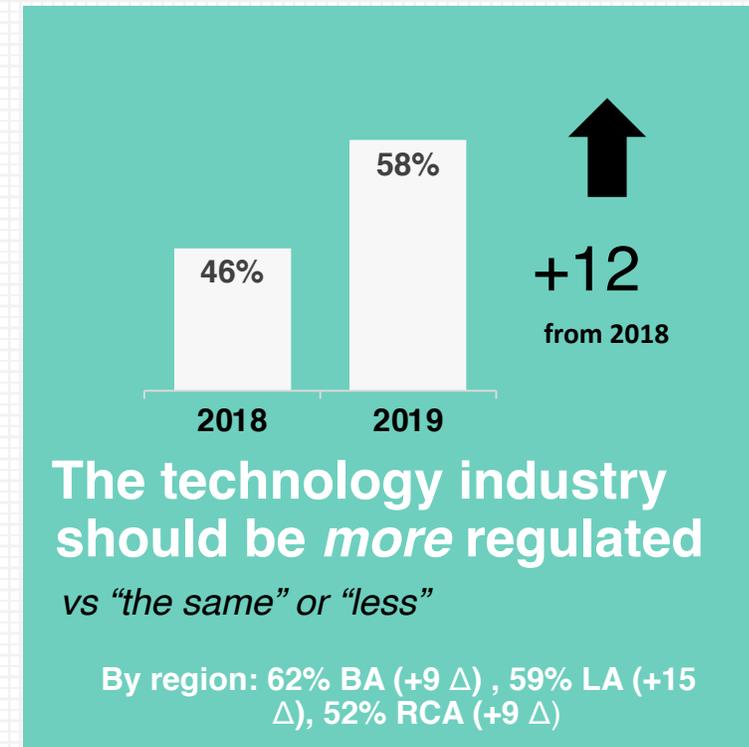
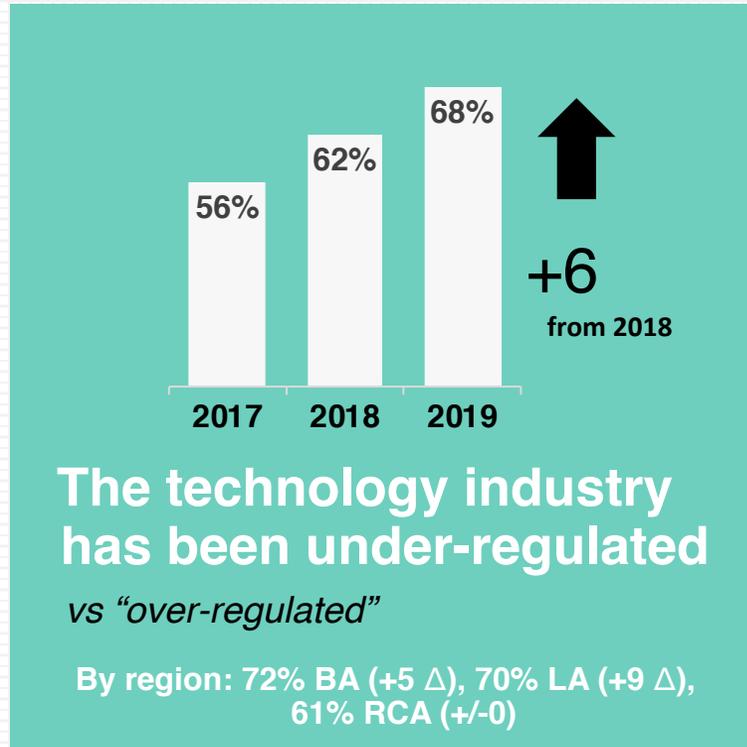
DRV_TEC_AGR: For each of the statements below, please indicate how much you agree or disagree. General Population, CA

A blurred, black and white photograph of a crowd of people walking past a wall with a grid pattern. Overlaid on the image is a large, stylized blue graphic consisting of many thin, curved lines that form a wave-like shape, resembling a signal or a network. The text "A CALL FOR CHANGE" is centered in white, bold, sans-serif font.

A CALL FOR CHANGE

AMONG CALIFORNIANS, DEMAND FOR TECH REGULATION IS *CLIMBING...*

CALIFORNIANS INCREASINGLY CALL FOR TECH REGULATION



Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

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?

General Population, CA

AND TECH EMPLOYEES HAVE EVEN GREATER EXPECTATIONS FOR THEIR EMPLOYERS

86%

+5pts
vs. CA

of Tech Workers say that given their impact on local areas in which they operate, **tech companies have an obligation to improve local issues**

85%

+9pts
vs. CA

of Tech Workers say that given their impact on society, **tech companies have an obligation to improve societal issues**

75%

+8pts
vs. CA

of Tech Workers say that **business leaders in tech should be doing more to improve CA**



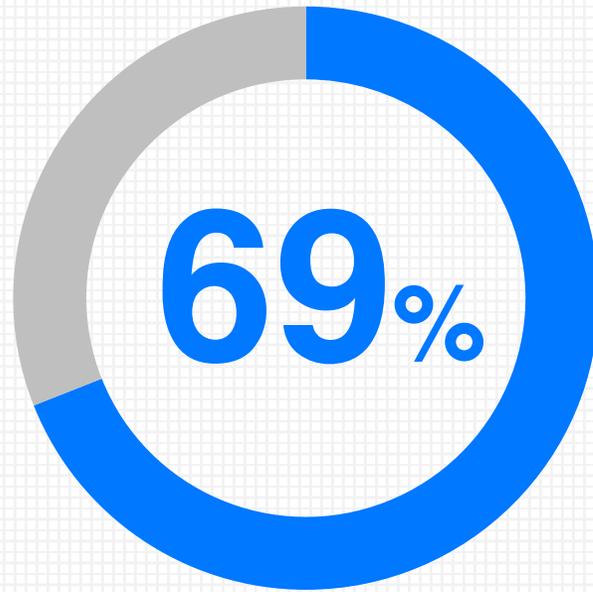
Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

QN54: Please indicate whether you agree or disagree with each of the following. Tech Workers, Bay Area, CA

Q19_D: For the following groups, what is your opinion when it comes to the role and responsibility they should be taking in improving California? They should be doing...

Tech Workers, Bay Area, CA

TECH WORKERS WANT CHANGE AND CALL FOR REGULATION



Of Tech Workers say
**the technology industry
has been *under-regulated***
vs “over-regulated”

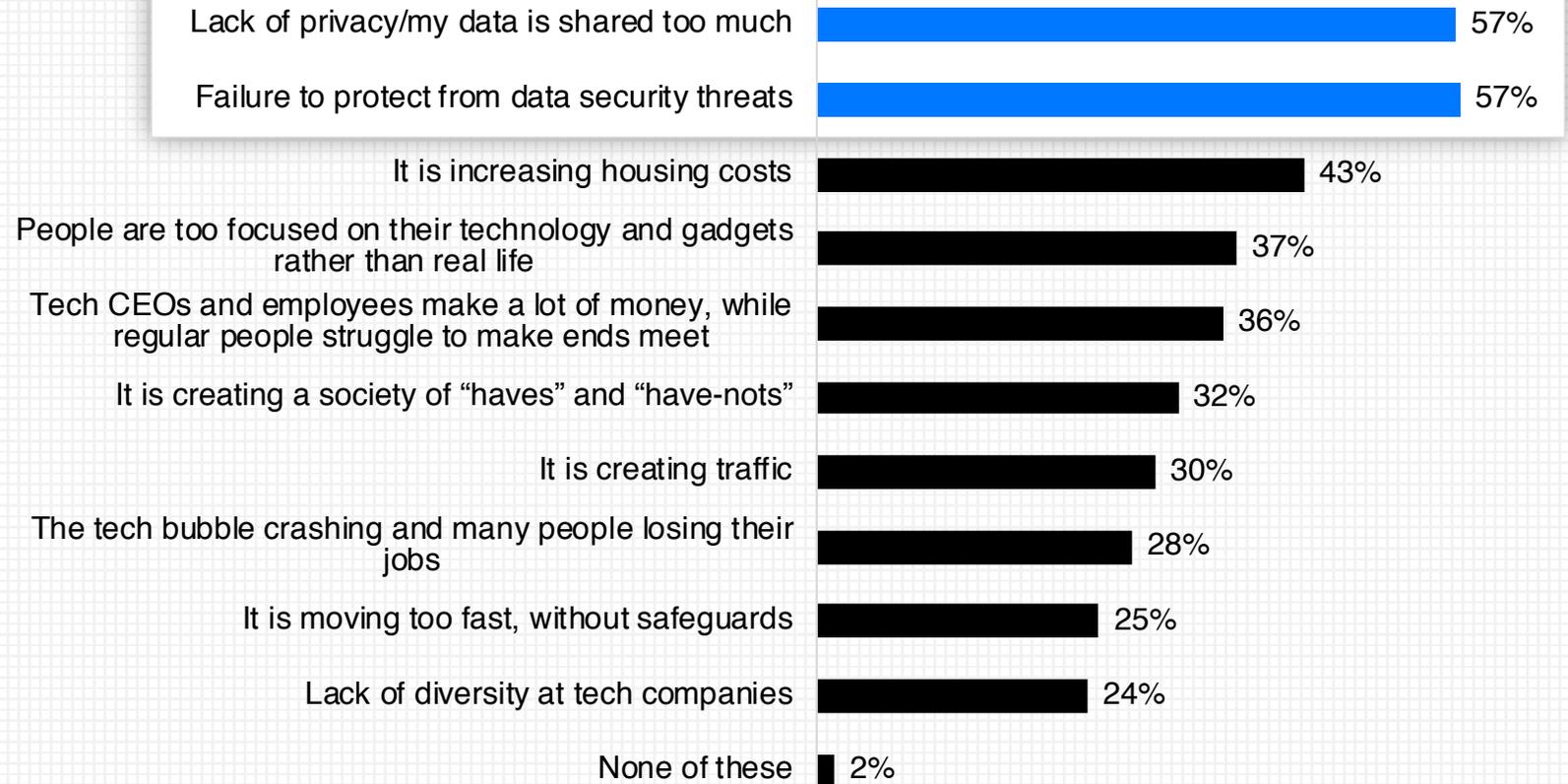
DATA PRIVACY AT THE TOP OF BAY AREA TECH EMPLOYEE CONCERNS

TECH HAS AN OBLIGATION TO PROTECT

94%

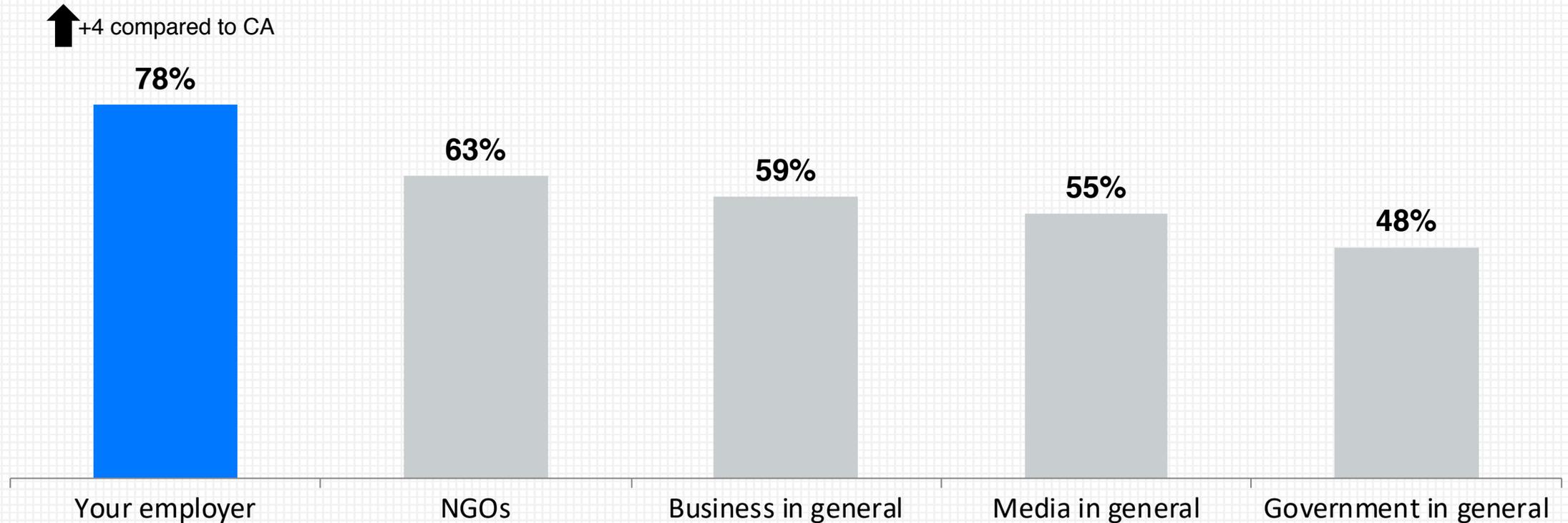
of Tech Workers agree **tech companies have an obligation to protect** their users' data

Top Tech Industry Concerns *Among Tech Workers*



DESPITE TECH'S CHALLENGES, TECH EMPLOYERS MOST TRUSTED INSTITUTION AMONG TECH WORKERS

% Trust in Institutions (6-9), Among Tech Workers



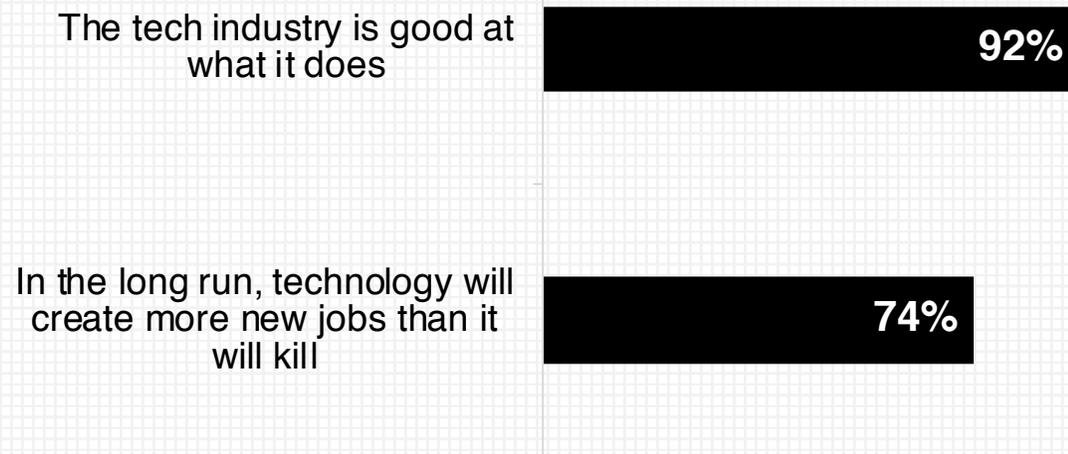
Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

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”. Tech Workers, Bay Area, CA

TECH WORKERS BELIEVE IN THE PROMISE OF TECH AND WANT TO BE PART OF THE SOLUTION...SO EMPOWER THEM

THEY ARE AMBASSADORS OF THE TECH INDUSTRY...

% Agree, Among Tech Workers



...AND SEEK TO BE PARTNERS

78%

of Tech Workers agree that **business leaders need to empower their employees to be active community members** in the communities where they operate

64% CA



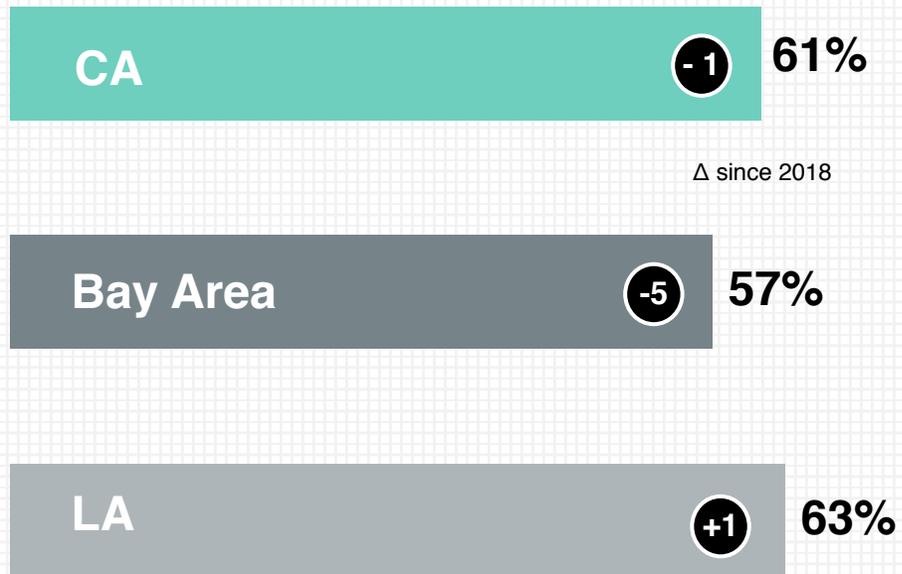


CONTINUED CHALLENGES FOR SOCIAL MEDIA

SOCIAL MEDIA SLIPS FURTHER INTO DISTRUST

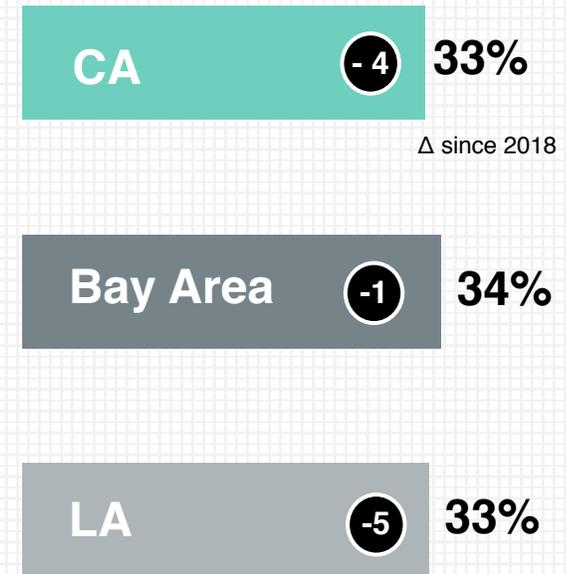
% Trust in sectors (6-9) and shift from 2018 to 2019

Trust in Tech to Do What is Right



Tech Advantage: 28 pts

Trust in Social Media to Do What is Right

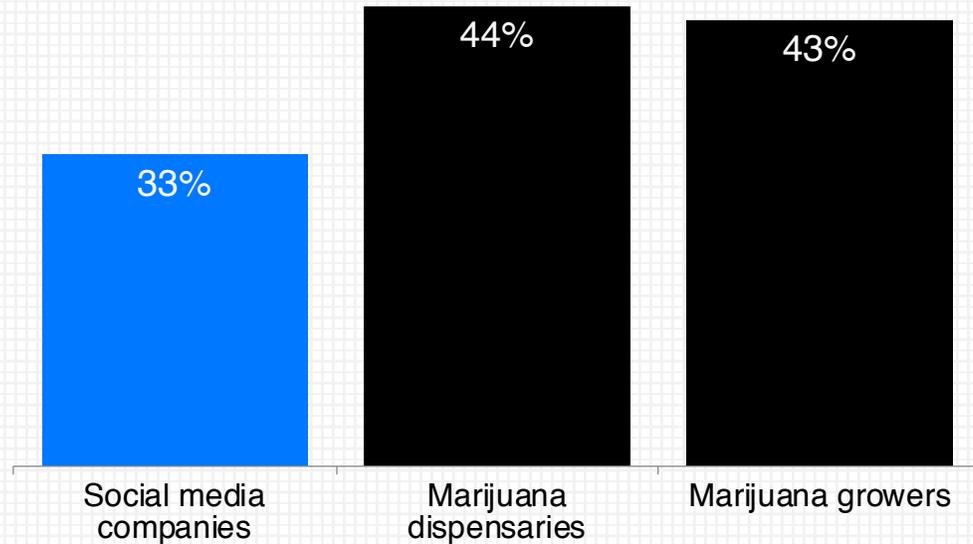


Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

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”. (Trust 6-9). General Population, CA

CANNABIS INDUSTRY IS MORE TRUSTED THAN SOCIAL MEDIA

% Trust in groups (6-9)



And valuable to California's economy...

53%

think the marijuana industry fuels some/a great deal of the economy in my area of California

Companies that refuse to support the cannabis industry face a trust hit

- ➔ 48% trust companies that are **willing to perform support services** for marijuana growers and dispensaries
- ➔ 35% trust companies that **refuse to perform support services** for marijuana growers and dispensaries

Source: 2019 Edelman Trust Barometer Special Report: California (January 2019)

Q18_M: Now that recreational marijuana use is legal in California, new businesses are starting to cultivate and sell marijuana and marijuana products. Please indicate how much you trust these marijuana businesses to do what is right. Please use a 9-point scale where one means that you "do not trust them at all" and nine means that you "trust them a great deal". General Population, CA
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." General Population, CA
Q5CA: Please indicate how much you think each of the following industries is fueling the economy in your area of California. A great deal, some, a little, none. General Population, CA

