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.

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

<table>
<thead>
<tr>
<th>Institution</th>
<th>US</th>
<th>CA</th>
<th>Trust Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>54%</td>
<td>45%</td>
<td>-9</td>
</tr>
<tr>
<td>NGOs</td>
<td>52%</td>
<td>41%</td>
<td>-11</td>
</tr>
<tr>
<td>Media</td>
<td>48%</td>
<td>38%</td>
<td>-10</td>
</tr>
<tr>
<td>Government</td>
<td>40%</td>
<td>32%</td>
<td>-8</td>
</tr>
</tbody>
</table>

Average Trust in CA: 39%
-10 compared to US

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.
CALIFORNIA'S ARE AMBIVALENT TOWARD THEIR ENGINES OF PROSPERITY, EVEN AS THE ENVY OF OTHERS

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

Percent trust in each sector

- Technology: 61% (-12 vs. US)
- Startup companies: 47% (-2)
- The "sharing economy": 47% (+2)
- Social media companies: 33% (-4)

Δ Since 2018
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

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.

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

- **40%**
  - **Housing costs**
    - 4x than the next threat
  - **Over 6x for BA residents** (49% Housing vs. 8% High Health Care Costs)
    - +5 Δ Since 2018 for BA

- **10%**
  - High housing costs

- **7%**
  - High health care costs

- **7%**
  - Crime/security

- **7%**
  - Lack of affordable higher education/college debt

- **5%**
  - The drought

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

- **Elected representatives**: 72%
- **Business leaders in general**: 66%

70% in the Bay Area vs. 64% LA, 67% RCA

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

63%

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.

69%

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.

68% of the Bay Area

vs. 62% in LA


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

Who do you trust more to....?

- Improve the area in which you live:
  - Business Leaders: 56%
  - Federal Government: 44%

- Fix California's problems:
  - Business Leaders: 47%
  - Federal Government: 53%

TAKING RESPONSIBILITY AND ACTION BUILDS TRUST

% trust a company more if they…

<table>
<thead>
<tr>
<th>Accept Responsibility</th>
<th>Do Something About It</th>
</tr>
</thead>
<tbody>
<tr>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>62% BA vs. 58% LA</td>
<td></td>
</tr>
</tbody>
</table>

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)

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

Q19_C: If a company did the following, would it make you trust them more, the same, or less? General Population, CA
TECH’S ROLE IN IMPROVING CALIFORNIA
67% think business leaders in the tech industry should be doing more to improve California

27% think they should be doing the same

6% think they should be doing less

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

Responsibility to prepare Californians for future issues...

- Job displacement due to advancements in technology: 65% agree, 35% disagree.
- Lack of technical skills for jobs of the future: 60% agree, 40% disagree.

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.

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 CALL FOR CHANGE
AMONG CALIFORNIANS, DEMAND FOR TECH REGULATION IS CLIMBING…

CALIFORNIANS INCREASINGLY CALL FOR TECH REGULATION

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

By region: 72% BA (+5 Δ), 70% LA (+9 Δ), 61% RCA (+/-0)

The technology industry should be more regulated vs “the same” or “less”

By region: 62% BA (+9 Δ), 59% LA (+15 Δ), 52% RCA (+9 Δ)

Q51. 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


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...

- **86%** of Tech Workers say that given their impact on local areas in which they operate, tech companies have an obligation to improve local issues
  - +5 pts vs. CA

- **85%** of Tech Workers say that given their impact on society, tech companies have an obligation to improve societal issues
  - +9 pts vs. CA

- **75%** of Tech Workers say that business leaders in tech should be doing more to improve CA
  - +8 pts vs. CA
Of Tech Workers say
the technology industry has been *under-regulated* vs “over-regulated”

69%
DATA PRIVACY AT THE TOP OF BAY AREA TECH EMPLOYEE CONCERNS

94% of Tech Workers agree tech companies have an obligation to protect their users’ data

Top Tech Industry Concerns
Among Tech Workers

- Lack of privacy/my data is shared too much: 57%
- Failure to protect from data security threats: 57%
- It is increasing housing costs: 43%
- People are too focused on their technology and gadgets rather than real life: 37%
- Tech CEOs and employees make a lot of money, while regular people struggle to make ends meet: 36%
- It is creating a society of “haves” and “have-nots”: 32%
- It is creating traffic: 30%
- The tech bubble crashing and many people losing their jobs: 28%
- It is moving too fast, without safeguards: 25%
- Lack of diversity at tech companies: 24%
- None of these: 2%

QN54: Please indicate whether you agree or disagree with each of the following. Tech Workers, Bay Area, CA
QN17. What are your top concerns about the technology industry? Please select all that apply. Tech Workers, Bay Area, CA
DESPITE TECH’S CHALLENGES, TECH EMPLOYERS MOST TRUSTED INSTITUTION AMONG TECH WORKERS

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

Your employer: 78%
NGOs: 63%
Business in general: 59%
Media in general: 55%
Government in general: 48%

+4 compared to 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". Tech Workers, Bay Area, CA
In the long run, technology will create more new jobs than it will kill.

The tech industry is good at what it does.

They are ambassadors of the tech industry... and seek to be partners.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>2018</th>
<th>2019</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>61%</td>
<td>60%</td>
<td>-1</td>
</tr>
<tr>
<td>Bay Area</td>
<td>57%</td>
<td>56%</td>
<td>-1</td>
</tr>
<tr>
<td>LA</td>
<td>63%</td>
<td>64%</td>
<td>+1</td>
</tr>
</tbody>
</table>

Tech Advantage: 28 pts

## Trust in Social Media to Do What is Right

<table>
<thead>
<tr>
<th>Region</th>
<th>2018</th>
<th>2019</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>33%</td>
<td>32%</td>
<td>-1</td>
</tr>
<tr>
<td>Bay Area</td>
<td>34%</td>
<td>33%</td>
<td>-1</td>
</tr>
<tr>
<td>LA</td>
<td>33%</td>
<td>33%</td>
<td>-5</td>
</tr>
</tbody>
</table>


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

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