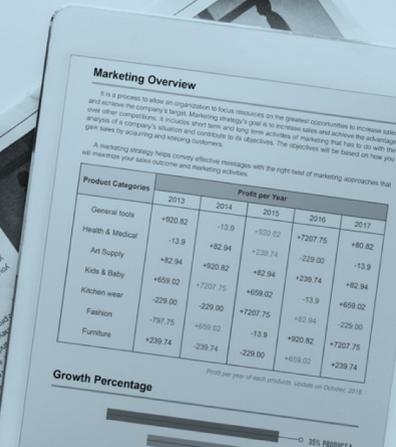
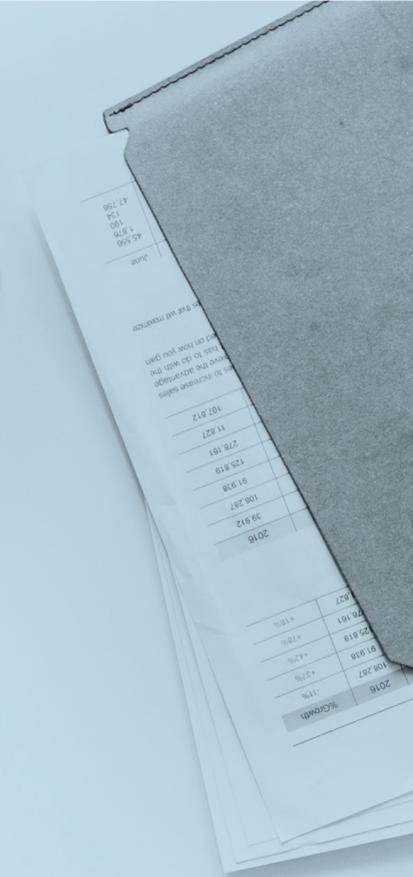


BRUNSWICK



The Public's View on Technology and Data

Comprehensive Report on Survey & Focus Group Findings



Executive Summary

BRUNSWICK

Methodology

	Focus Group Participants	<ol style="list-style-type: none">1. Jackson, MS Tech Opinion Leaders2. Washington, DC Policy Influencers3. Seattle, WA Tech Opinion Leaders
	Survey Audience	1,000 Voters Nationwide 200 Voter Oversample in each of AZ, FL, HI, IL, MS, NC, OH, TX, WA
	Focus Group Segmentation	Jackson: 1 Pro-tech, 1 Tech-neutral DC: 1 Republican Policy Elites, 1 Democratic Policy Elites Seattle: 1 Pro-tech, 1 Tech-neutral
	Group Criteria	Jackson and Seattle: Individuals who are interested in tech (and are either supporters or neutral) who are highly educated, have a high household income, and are civically active. DC: Individuals with a professional involvement in policymaking in Congress, a presidential administration, senior federal agency staff, think tanks, trade associations, or policy advocacy groups who are highly educated, have a high household income, and are civically active.
	Survey Data Collection	Online
	Date	Focus Groups: February 4, February 6, and February 7, 2019 National Survey: May 13 – May 25, 2019 State Oversample Survey: May 13 – June 4,

Key Findings



From pragmatic benefits to emotional connections, Americans recognize and appreciate how technology has made life easier, better, and more efficient, and give tech companies enormous credit for those improvements.



However, that same ubiquity—coupled with lack of understanding of how data about themselves gets analyzed and used—spurs unease in a population that is aware of the risks but is unable or unwilling to cut the cord. This tension drives fear and frustration, and leads to support for additional tech sector regulation.

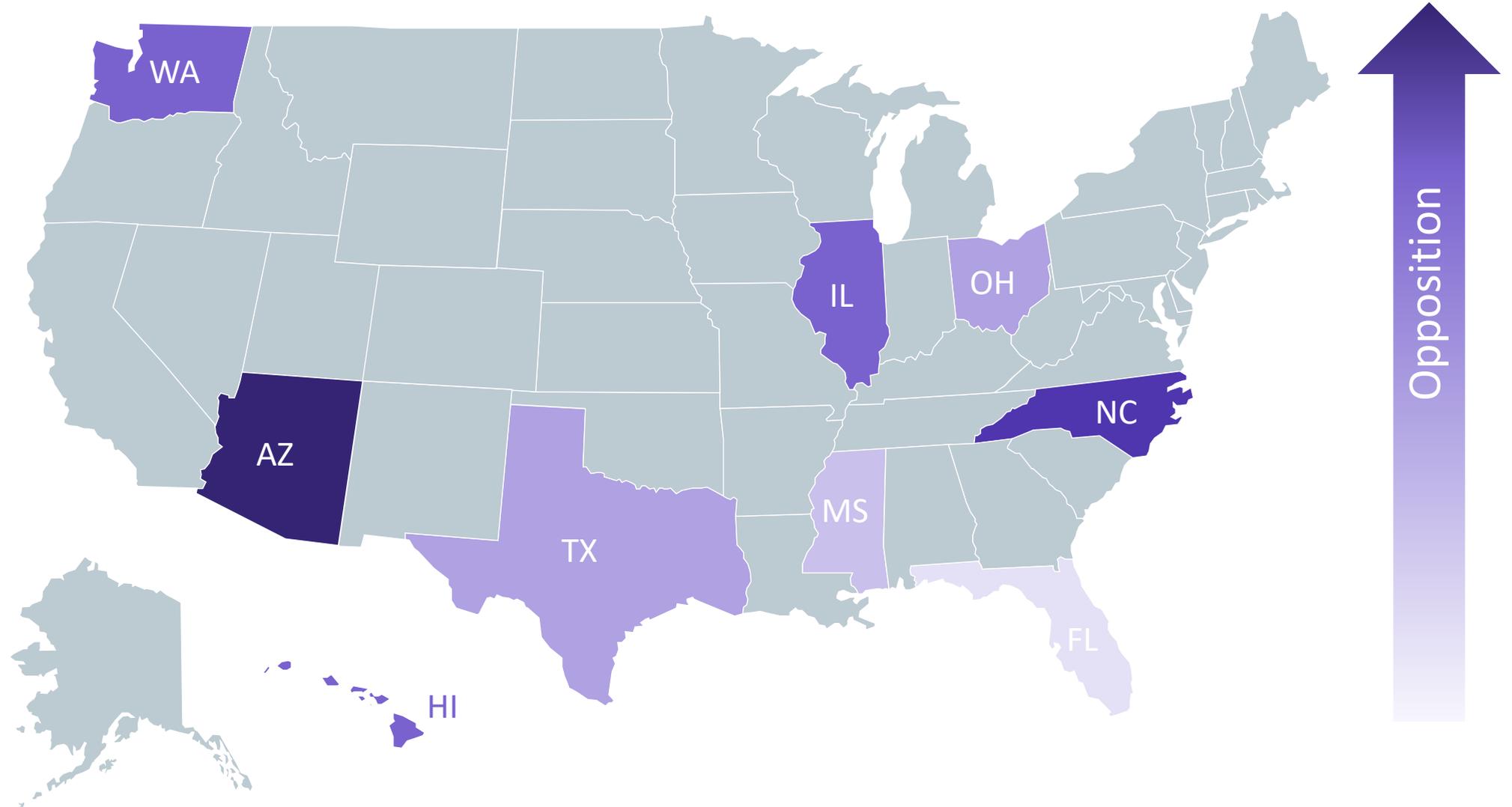


The path forward is two-fold: helping legislators understand that voters want collaboration and a private-sector solution of coalition of tech companies to help find the solutions; and empowering consumers to reduce fear by increasing clarity, choice, and security.

Key States: Most at-risk

North Carolina and Arizona show the greatest enthusiasm for regulation and view the tech sector skeptically

- × Feel negatively towards technology companies (somewhat and very)
- × Distrust technology companies (somewhat and very)
- × Think technology companies should be regulated
- × Think technology companies should be broken up into smaller parts



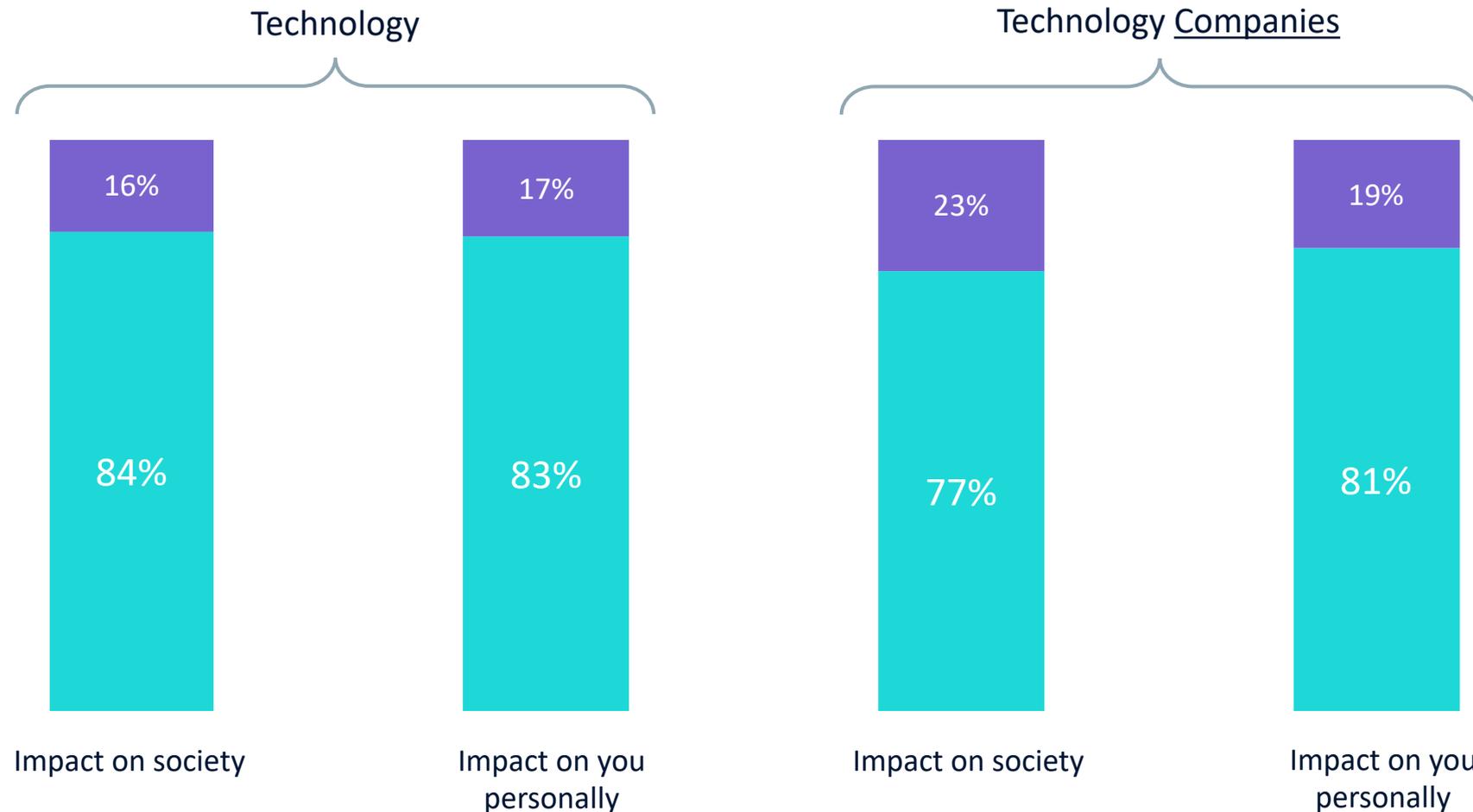
The Opinion Landscape

Tailwinds, headwinds, and how these differ between audiences

Tech is a positive force

Despite vocal criticism of individual companies, Americans have an overwhelmingly positive view of the sector and the technology it creates

Thinking about the impact technology/technology companies have had on _____, do you think that impact has been...

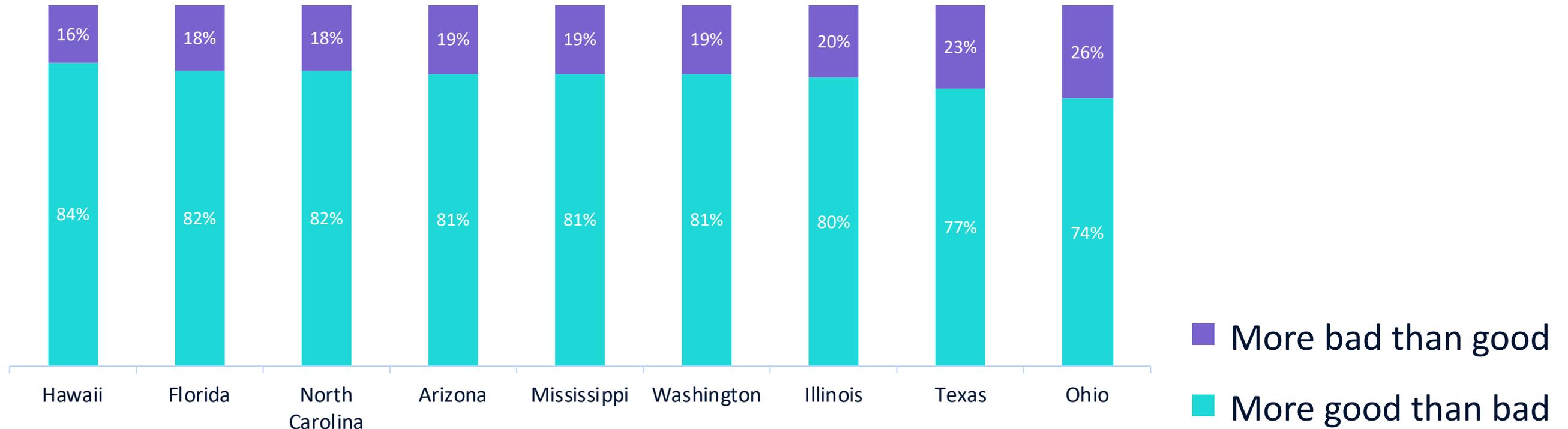


■ More bad than good
■ More good than bad

Tech is a positive force: State breakdown

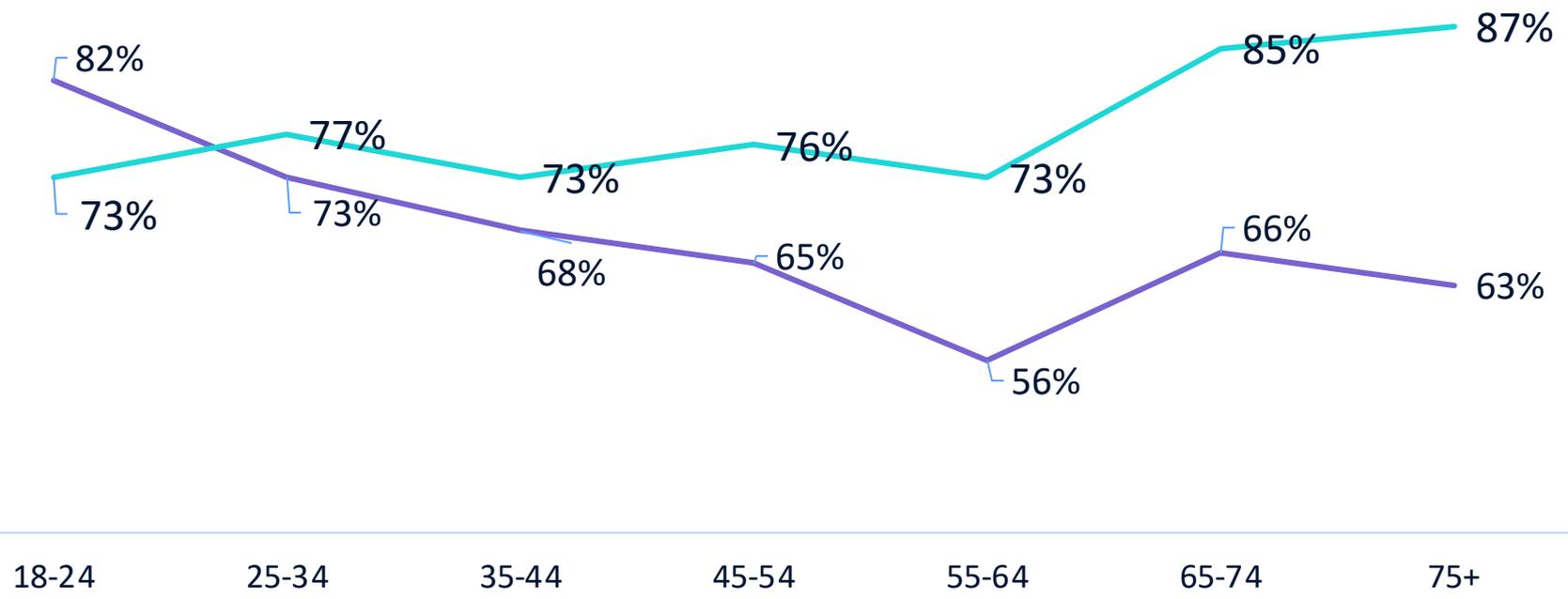
Ohio and Texas residents are less inclined to think that technology companies have had a positive impact on their lives

*Thinking about the impact technology **companies** have had on YOU PERSONALLY, do you think that impact has been...*



Young vs. Old

A gap emerges among older Americans, who appreciate the impact of technology, but view the sector far more skeptically



— Positive opinion of tech companies — Major tech companies' impact has been more good than bad

It makes my life easier by helping me stay connected with teachers when it's late at night and I need help with my homework...

- 18-24 year-old voter

I greatly enjoy being able to google things right when I have a question about them, and not forget by the time I have access to an encyclopedia...

- 18-24 year-old voter

By using voice control to have things done for me or easier to pay bills...

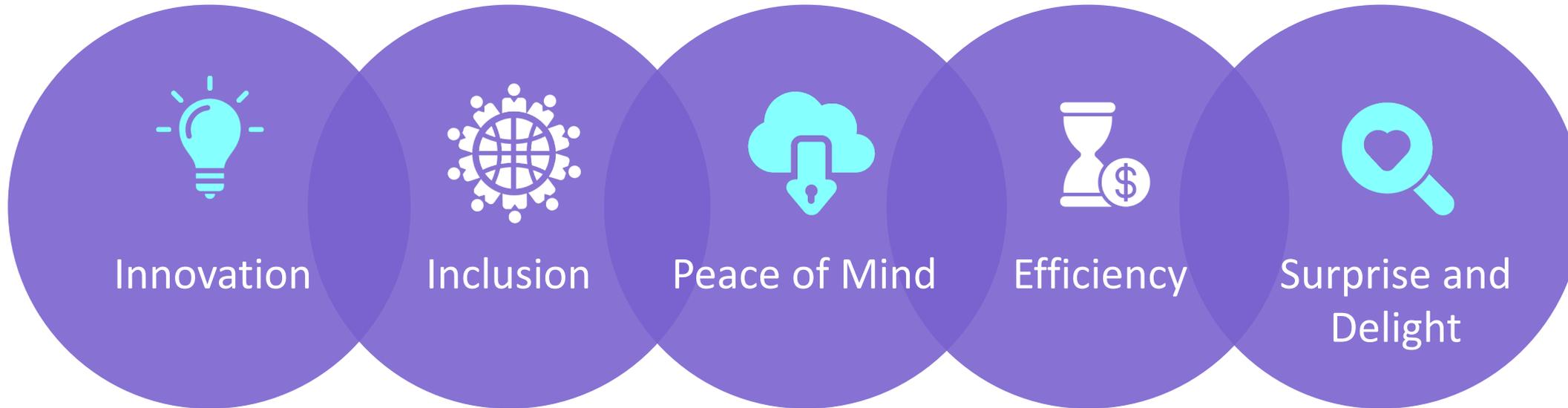
- 75+ year-old voter

The biggest is keeping in touch with my extended family which is states away...I have seen great-grandchildren that I would never see without technology.

- 75+ year-old voter

This benefit is rooted in deeply personal experiences

Americans articulate the benefits of technology through very personal connections



Data gives you direction, like where do you need to go?

MS Tech-Neutral



There's a lot of people coming online through mobile services in the developing world.

DC Dem



If my house burned down, stuff that's important to me would still be there.

WA Tech-Neutral



It helps to bring down costs...in a number of realms just greater data sharing has made life a lot easier and better.

DC Dem



...introducing me to a brand or a certain thing that I wouldn't otherwise have been introduced to that I actually, it turns out, value quite a lot.

DC Dem

The possibilities inspire

In what ways, specifically, do advances in technology make your life easier?



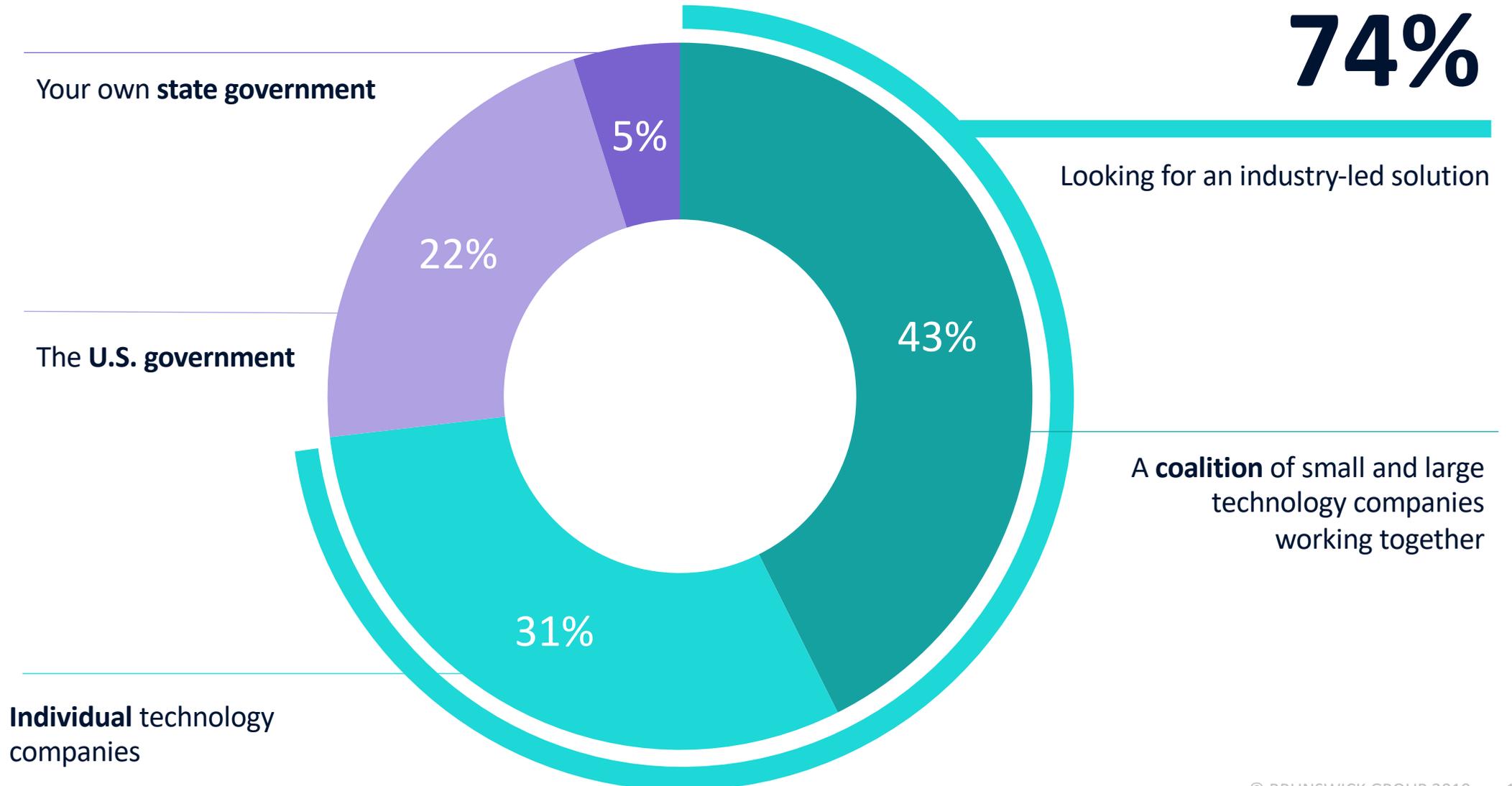
In the industry's favor

Trust in the industry is high

The tech sector is overwhelmingly trusted to address privacy concerns

Please indicate which of the four groups you trust MOST to come up with working solutions for ...

Protecting your personal data and privacy



74%

Looking for an industry-led solution

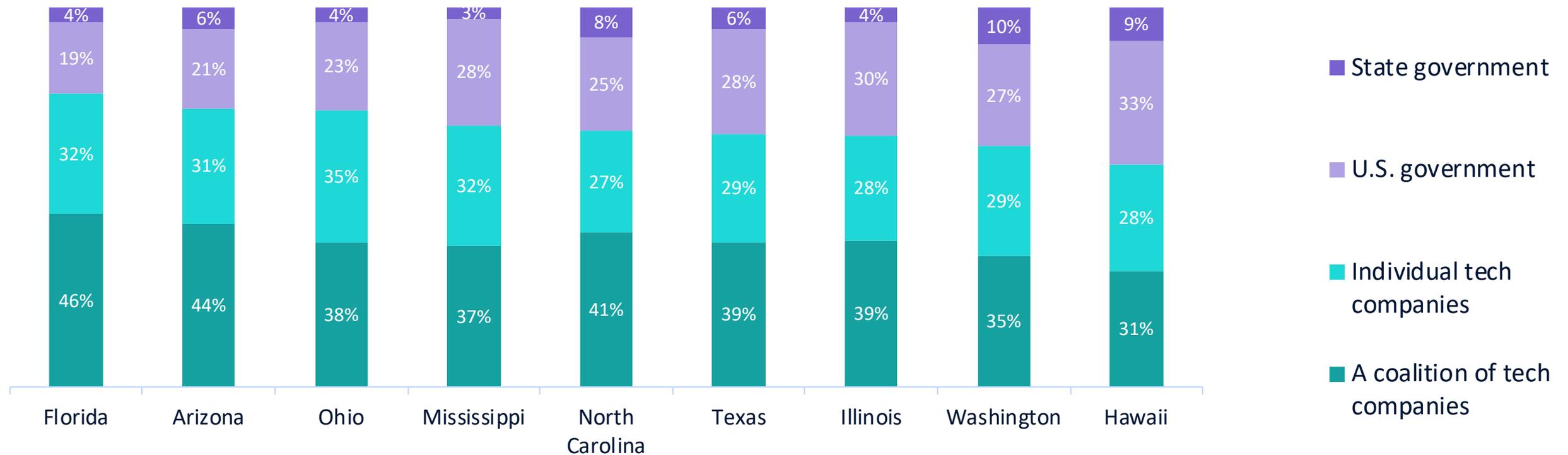
A coalition of small and large technology companies working together

Individual technology companies

Trust in the industry: State breakdown

While states generally agree that an industry-led approach to addressing privacy issues is best, the lowest trust comes from the progressive Western states of Hawaii and Washington

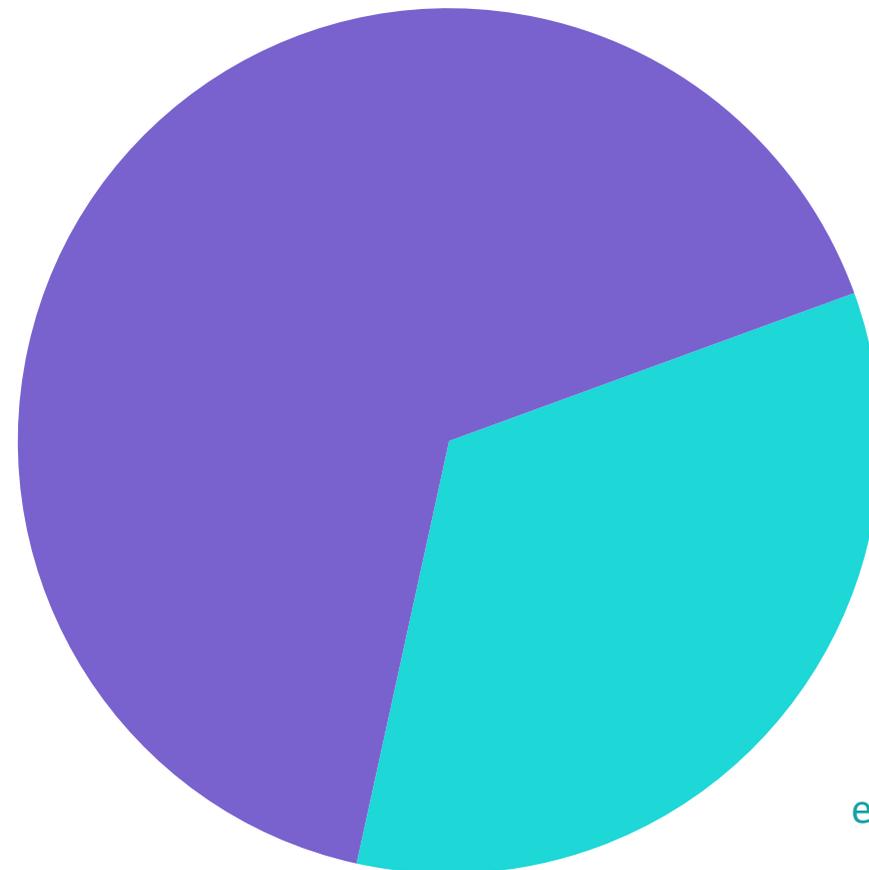
Please indicate which of the four groups you trust MOST to come up with working solutions for ... Protecting your personal data and privacy



Current reskilling efforts fall short

Most voters do not believe that companies are doing enough to reskill or train employees to keep up with advances in technology

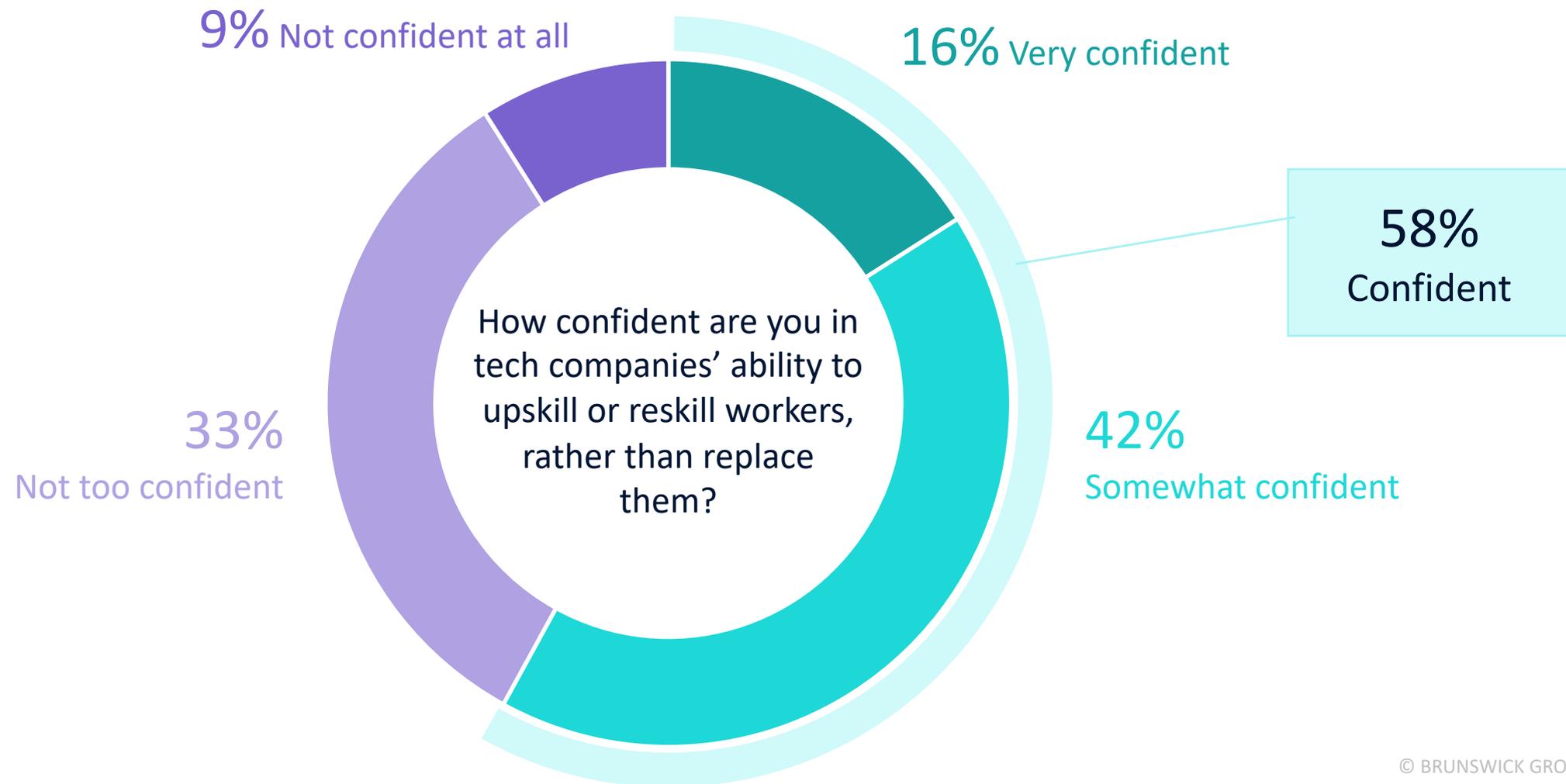
66%
U.S. companies don't do enough to reskill or train employees as needed to keep up with technological advances in the workplace.



34%
U.S. companies do a good job of reskilling and training employees to ensure they are prepared to meet the needs of today's job market.

But faith in the industry's ability to solve is high

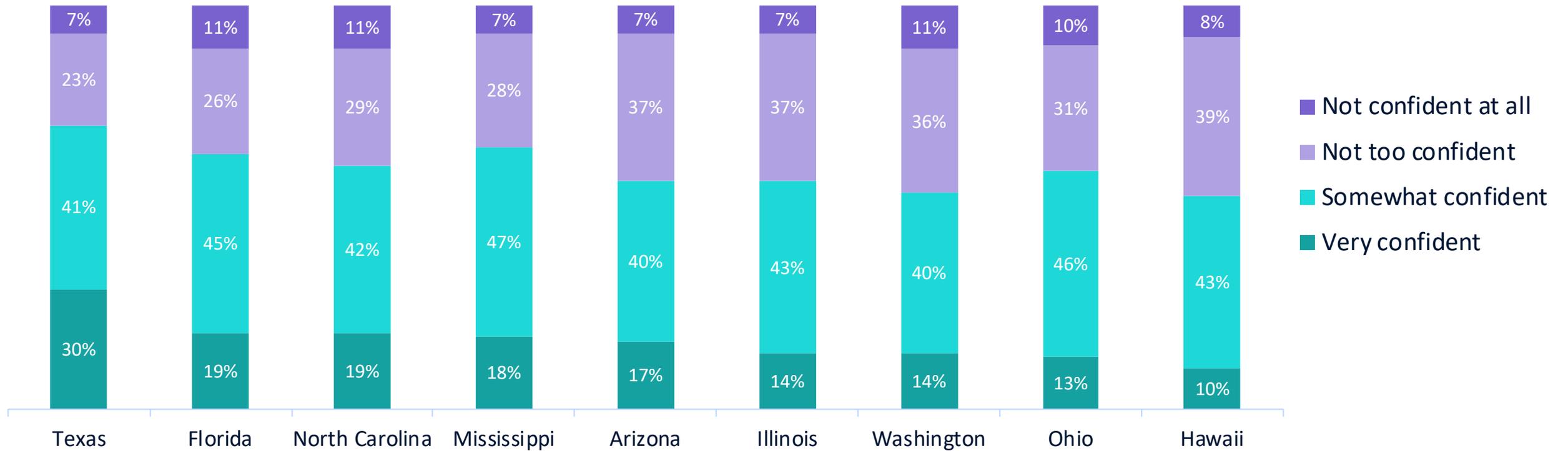
The public's confidence in the *ability* of tech companies to upskill workers rather than replace them sets the stage for tech companies to lead the charge on reskilling



Reskilling: State breakdown

Texas, Florida, and Mississippi residents have the most confidence in tech companies' abilities to reskill workers, while Hawaii and Washington continue to be among the most skeptical

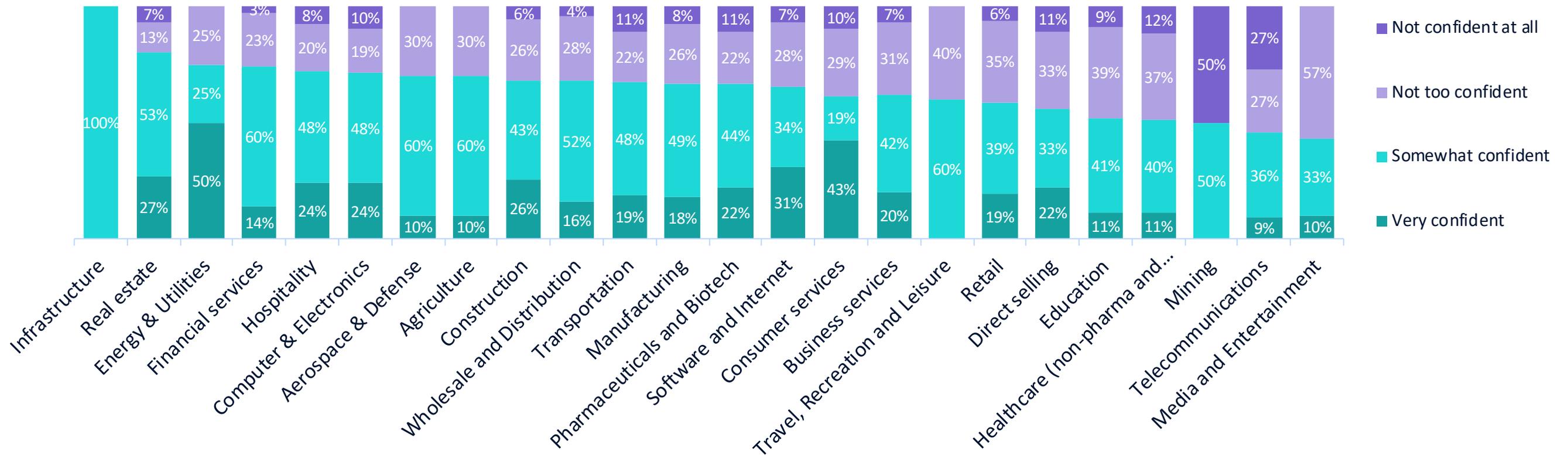
How confident are you in tech companies' ability to upskill or reskill workers, rather than replace them?



Reskilling: Industry breakdown

The mining, travel, telecoms and media industries have the least amount of confidence in tech to be able to reskill workers rather than replace them

How confident are you in tech companies' ability to upskill or reskill workers, rather than replace them?



Conflating privacy and security

Even when pressed to focus on privacy over security, individuals across focus groups had trouble differentiating between these issues

▀▀ I don't think it's so easy for us to separate the security aspect, although you're asking us to.

DC Democrat

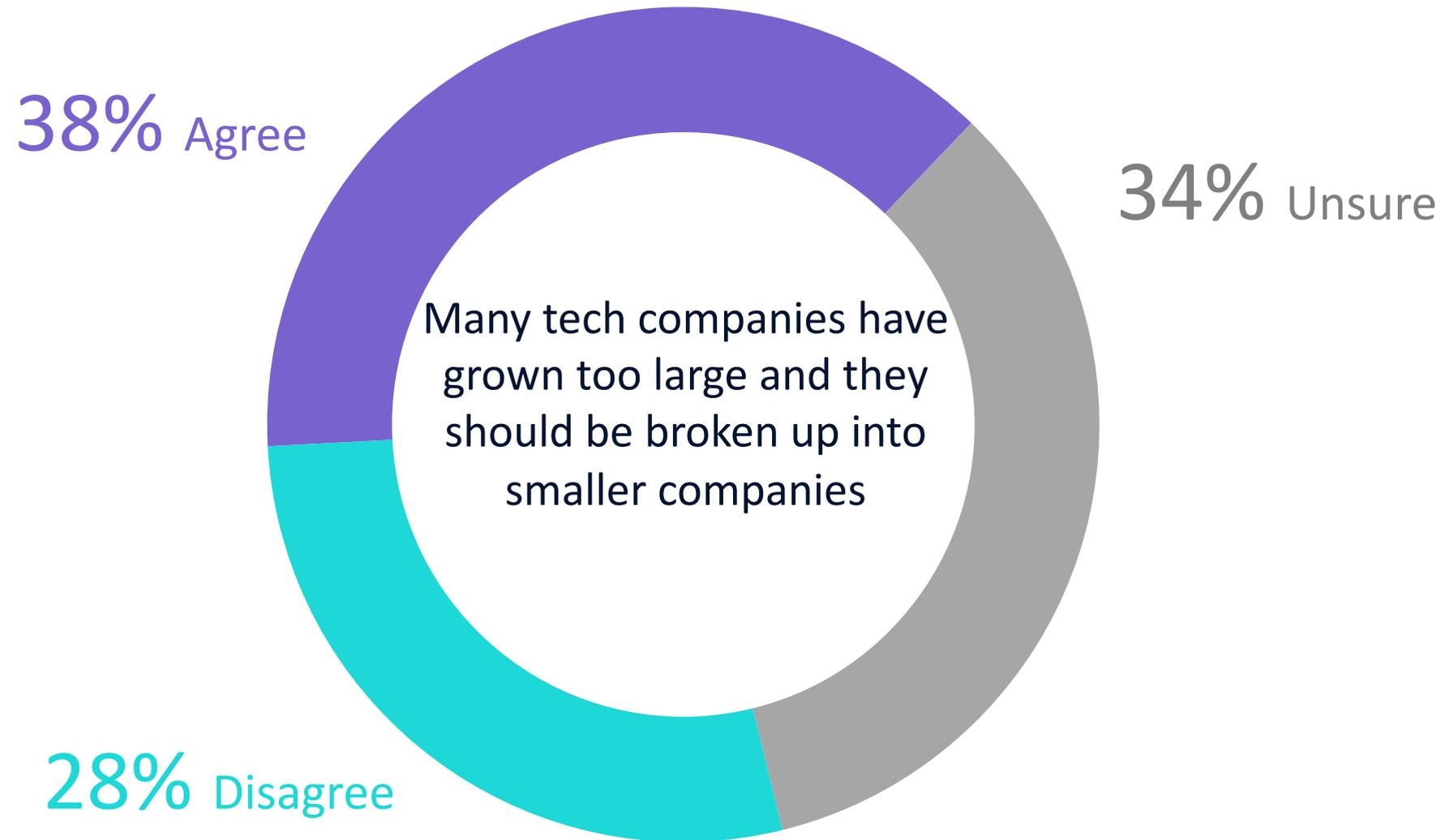
▀▀ I feel like privacy implies that the onus is on you as the consumer to protect your own data and to control where it is, whereas security puts it on the corporation or the company that you're working with.

DC Republican

The onus is on companies to clarify what they mean when they talk about “data privacy;” otherwise, the conversation will gravitate incessantly back to hacks and breaches.

Anti-trust concerns hold sway

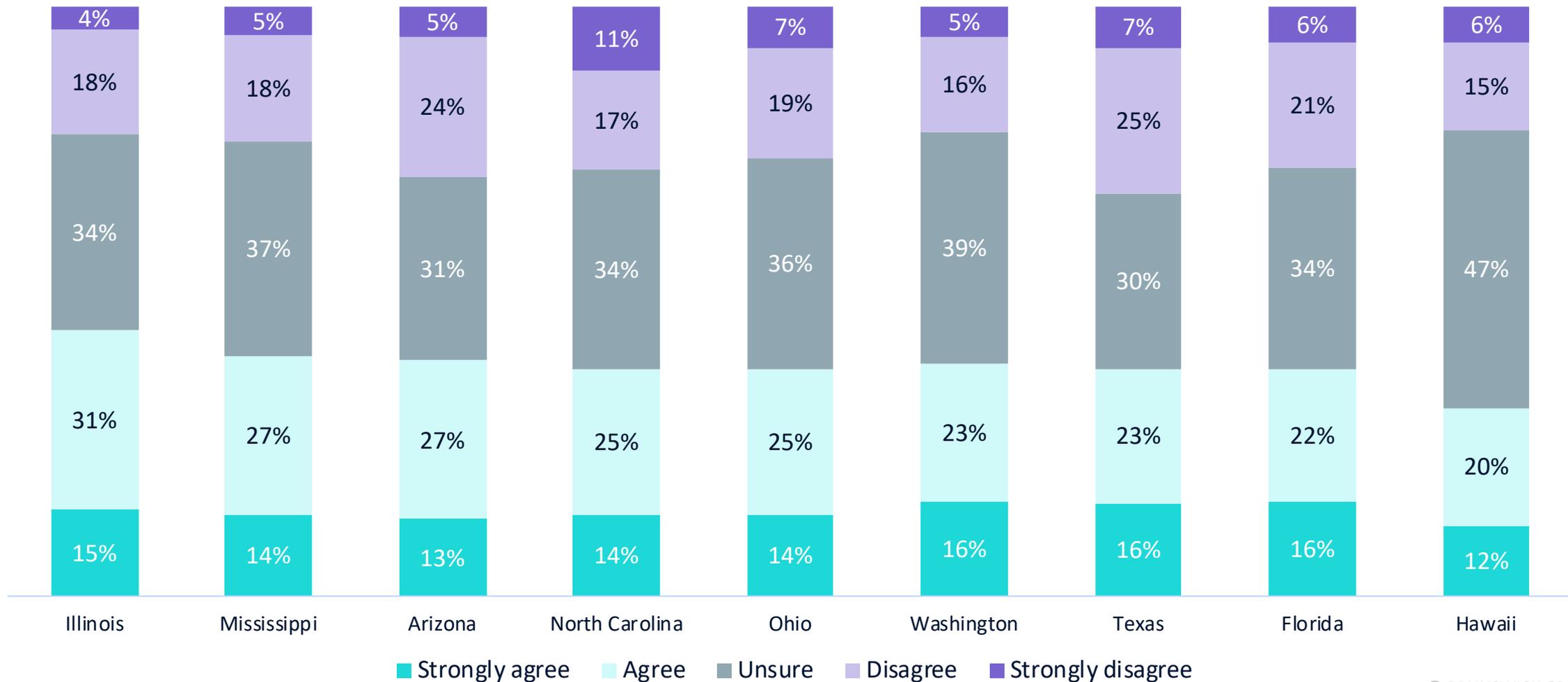
Although the public is divided on whether large tech companies should be broken up



Anti-Trust: State breakdown

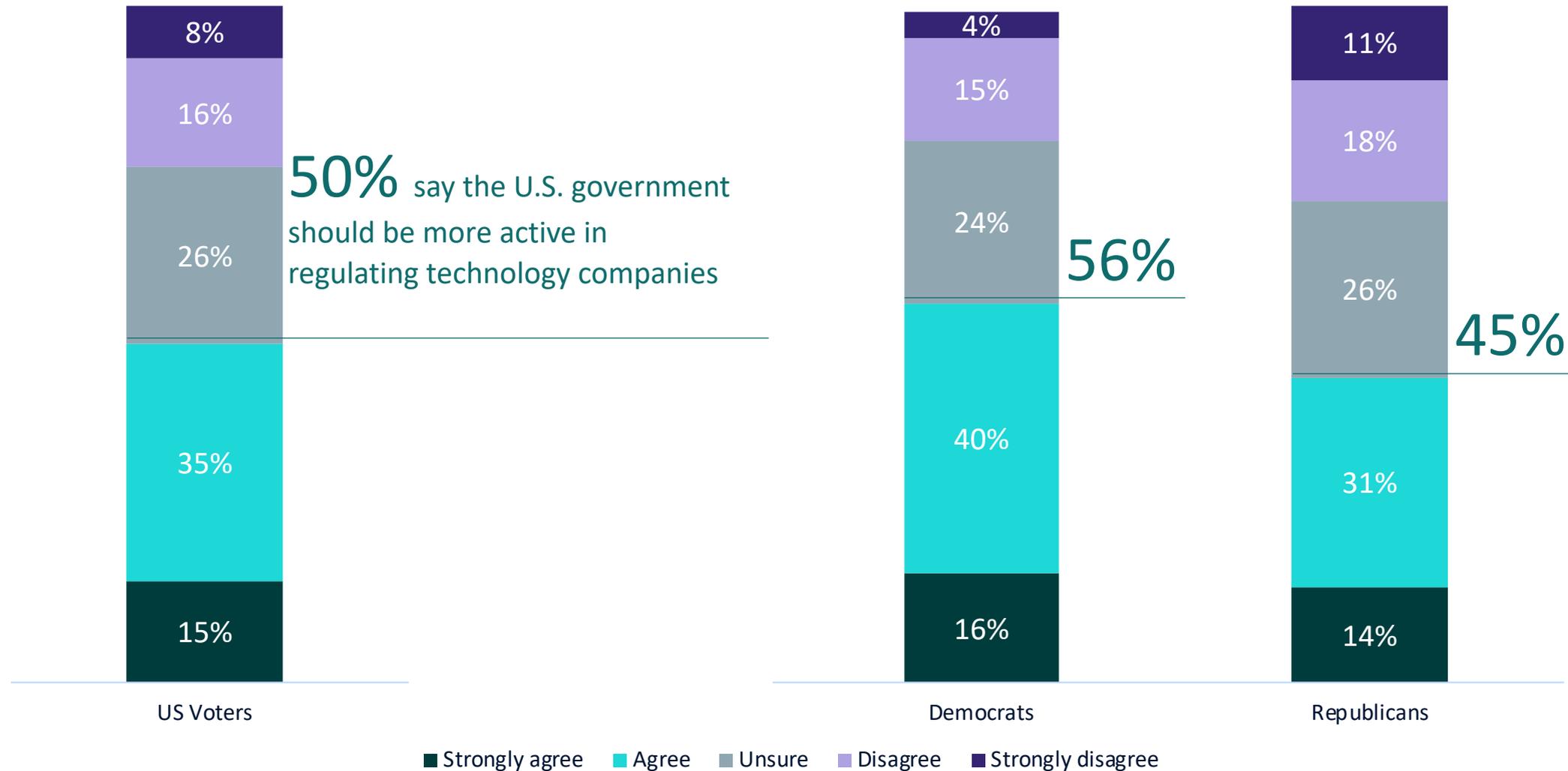
The sentiment is consistent among state oversamples

“Many tech companies have grown too large and they should be broken up into smaller companies”



Desire for regulation

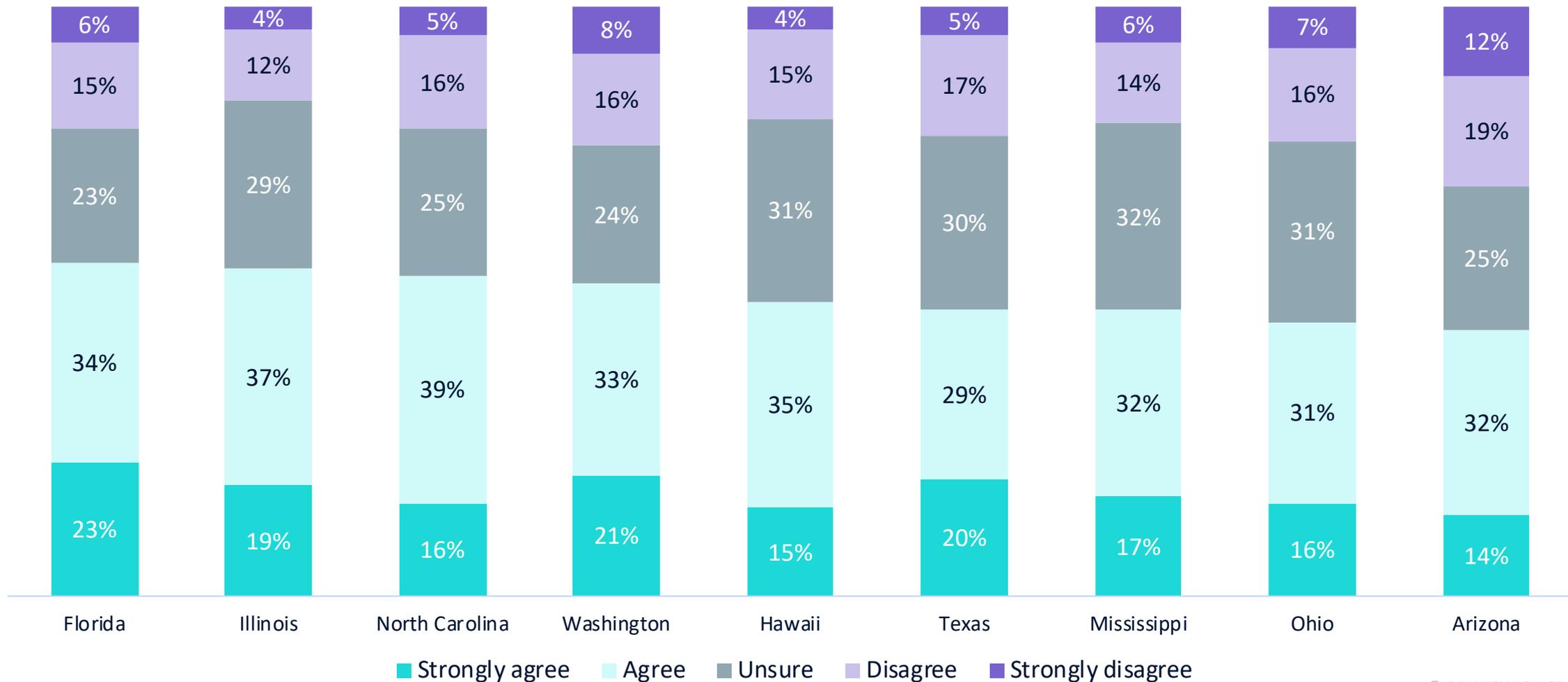
Voters want to see the government regulate tech companies



Desire for Regulation: State breakdown

Desire for regulation is highest in FL, IL, NC

“The U.S. government should be more active in regulating technology companies”



Meet our audience personas

Supporter



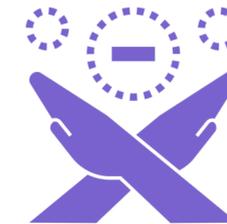
Age	Gen X
Gender	Male
Education	Some college – 4-year degree
Income	\$50,000-\$150,000
Political Party	Independent (lean Repub.)
2016 Vote	Trump/Clinton (split)
Type of Area	Suburban
STEM Degree?	No
Sector	Education, Retail

Persuadable



Age	Gen X
Gender	Female
Education	Some college – 4-year degree
Income	\$25,000-\$75,000
Political Party	Democrat
2016 Vote	Clinton
Type of Area	Urban
STEM Degree?	No
Sector	Healthcare, Business Services

Detractor



Age	Baby Boomer
Gender	Female
Education	4-year degree
Income	\$25,000-\$75,000
Political Party	Strong Democrat
2016 Vote	Clinton
Type of Area	Suburban
STEM Degree?	No
Sector	Education, Healthcare

Supporters



- ✓ Feel positively towards technology companies (somewhat and very)
- ✓ Trust technology companies (somewhat and very)
- ✓ Think technology companies should not be regulated
- ✓ Think technology companies should not be broken up into smaller parts

Age	Gen X
Gender	Male
Education	Some college – 4-year degree
Income	\$50,000-\$150,000
Political Party	Independent (lean Repub.)
2016 Vote	Trump/Clinton (split)
Type of Area	Suburban
STEM Degree?	No
Sector	Education, Retail



Persuadables

- ✓ Feel positively towards technology companies (somewhat and very)
- ✓ Trust technology companies (somewhat and very)
- ✓ Think technology companies should not be heavily regulated (top 1 box)
- ✓ Think technology companies should not be broken up into smaller parts (top 1 box)

Age	Gen X
Gender	Female
Education	Some college – 4-year degree
Income	\$25,000-\$75,000
Political Party	Democrat
2016 Vote	Clinton
Type of Area	Urban
STEM Degree?	No
Sector	Healthcare, Business Services



Detractors

- × Feel negatively towards technology companies (somewhat and very)
- × Distrust technology companies (somewhat and very)
- × Think technology companies should be regulated
- × Think technology companies should be broken up into smaller parts

Age	Baby Boomer
Gender	Female
Education	4-year degree
Income	\$25,000-\$75,000
Political Party	Strong Democrat
2016 Vote	Clinton
Type of Area	Suburban
STEM Degree?	No
Sector	Education, Healthcare

Tension Points

What these findings mean for
the tech sector

Respondents are concerned, but feel paralyzed

While opinion elites are uneasy about how companies analyze data, they acknowledge their own complicity in continuing to hand that data over

▀ You're concerned that your personal, private data is accessible to other people...

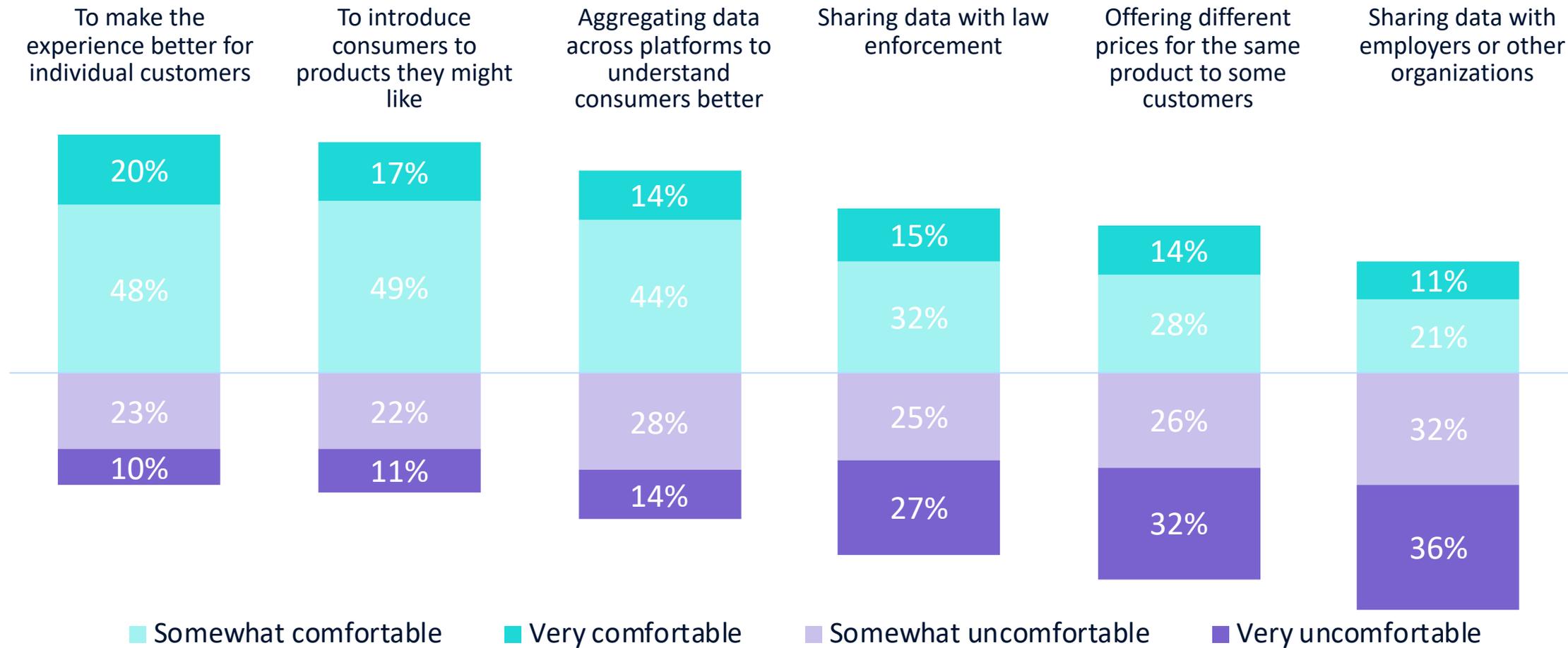
...but in turn, I do very little to try to protect my data. ▀

DC Dem



Application matters

While data collection is widely considered acceptable, “offline” uses incite concern and mistrust

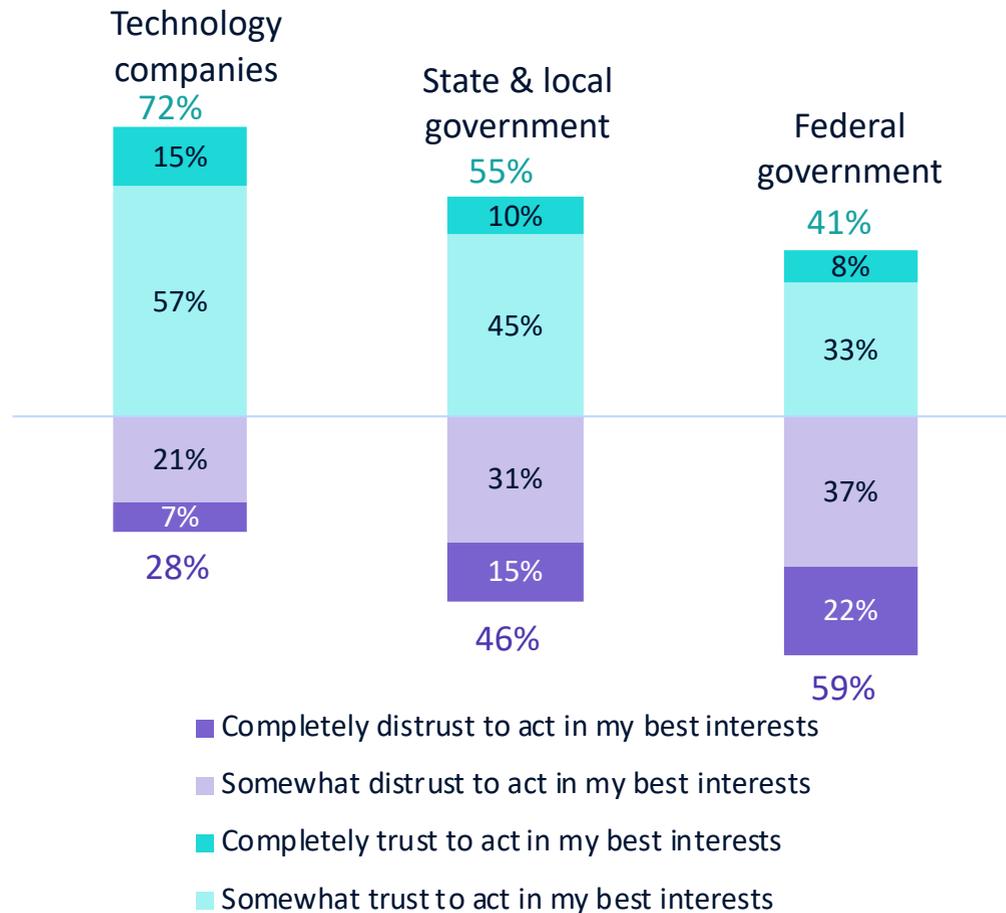


Q44: How comfortable are you with personal data being used in the following ways by technology companies today?

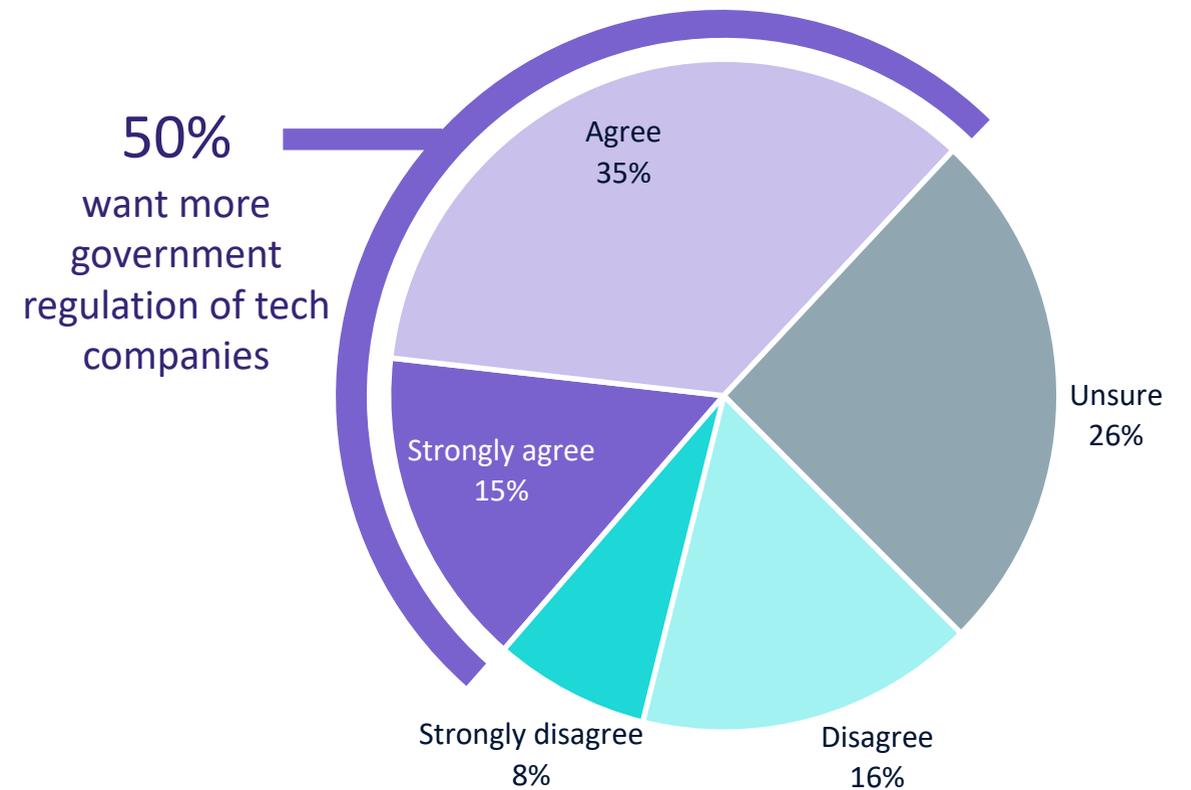
Trust but regulate

Tech companies are more trusted than government, but there is still an appetite for government involvement

How much do you trust the following to act in your best interests in the future?



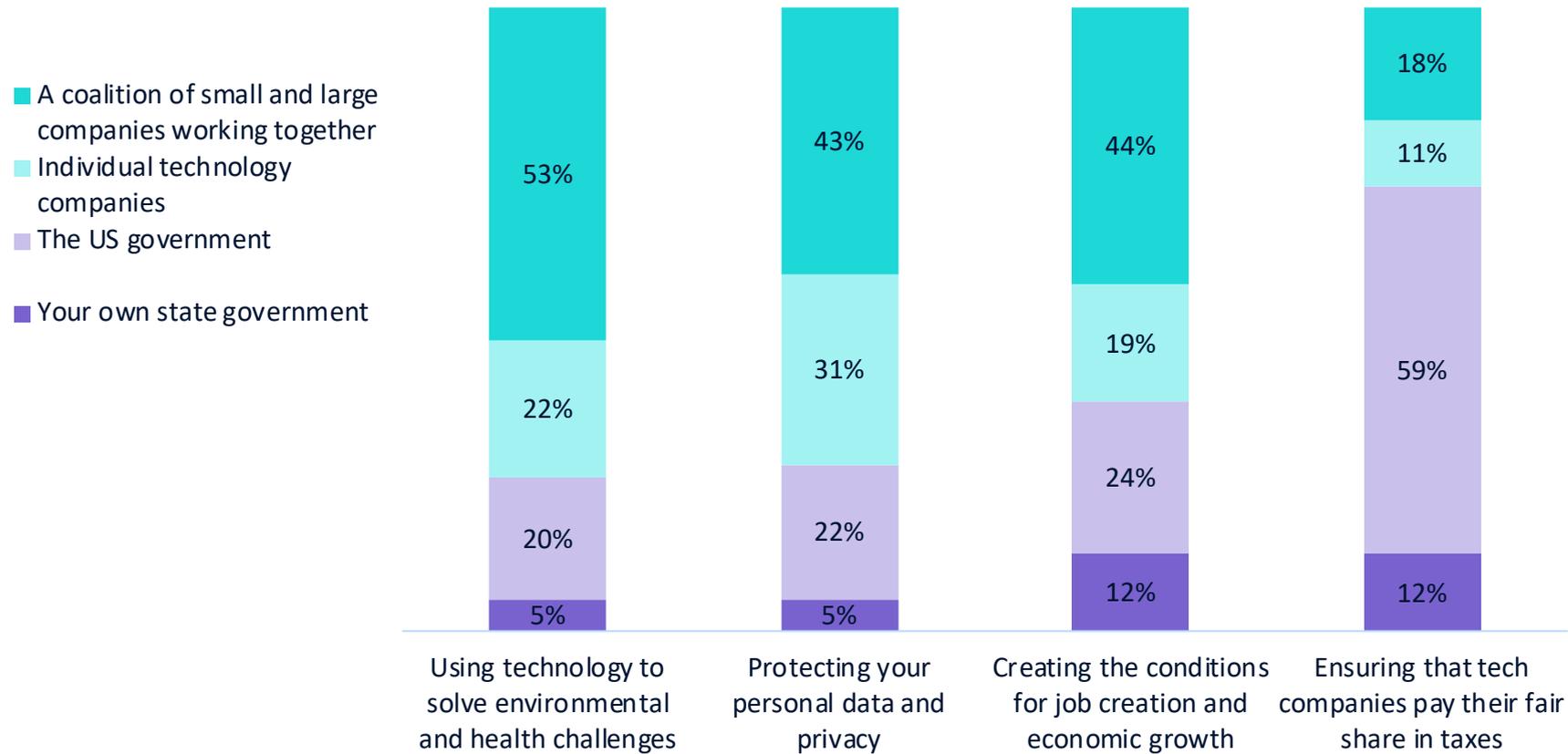
The U.S. government should be more active in regulating technology companies:



But there's ambivalence about regulatory intervention

While consumers want tech companies more heavily regulated, they have limited confidence in the government—federal or local—to get it right

Please indicate which of the four groups you trust MOST to come up with working solutions for each

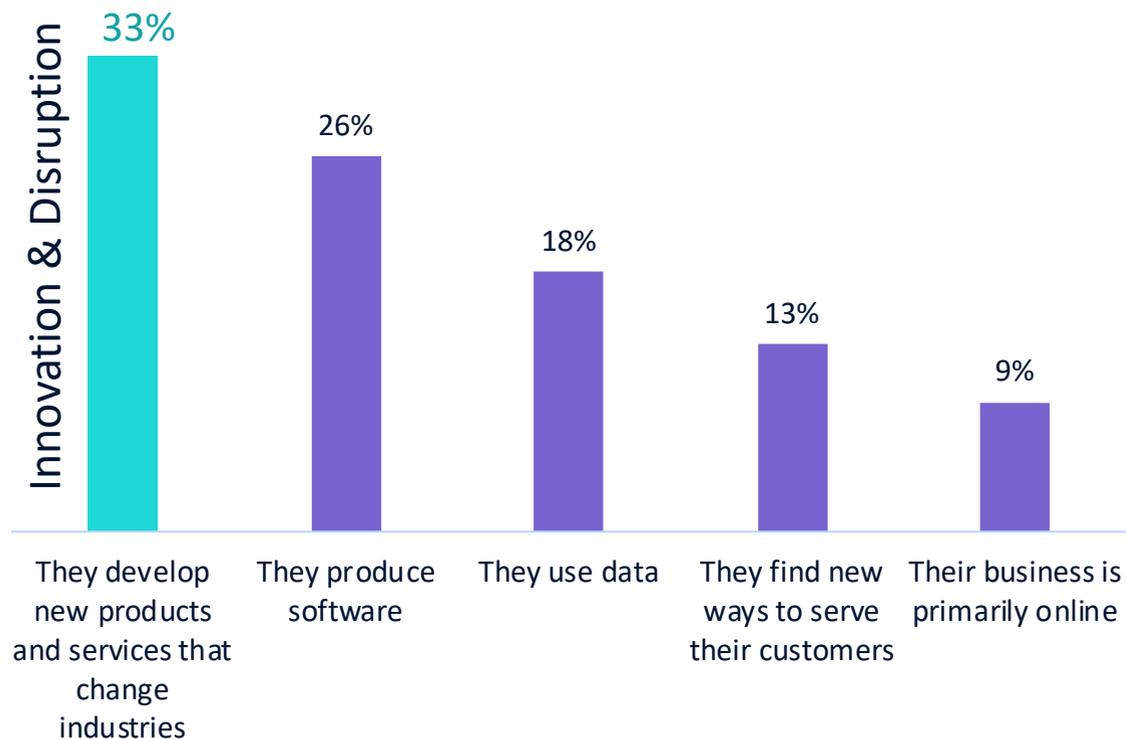


...think that policymakers and elected officials have an adequate understanding of how tech companies operate

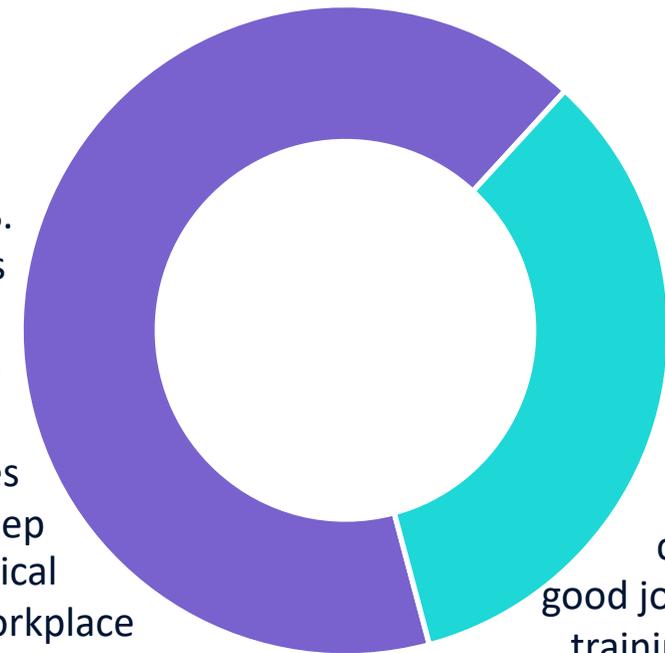
Reimagine—but follow through by retraining

The same positive associations the public has with the tech industry—as innovators, as disruptors—bring with them an expectation that tech companies take up the mantle of proactively reskilling the talent market they've upset

Which of the following are the most important attributes that define a "technology company"?



66% believe U.S. companies don't do enough to reskill or train employees as needed to keep up with technological advances in the workplace



34% believe U.S. companies do a good job of reskilling and training employees to ensure they are prepared to meet the needs of today's job market.

The Path Forward

How to navigate in this
evolving landscape

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Re-empowering is the key to getting privacy right

Tech companies can significantly address consumer privacy concerns by delivering on these three key expectations

Clarity

[W]hen there's stuff in the fine print that slips through, because it's designed to slip through, frankly, I think that's an issue.

WA Tech-Neutral

Security

I am putting all of my information online or into technology, which makes it easier for people to hack into and steal...

MI Voter

Agency

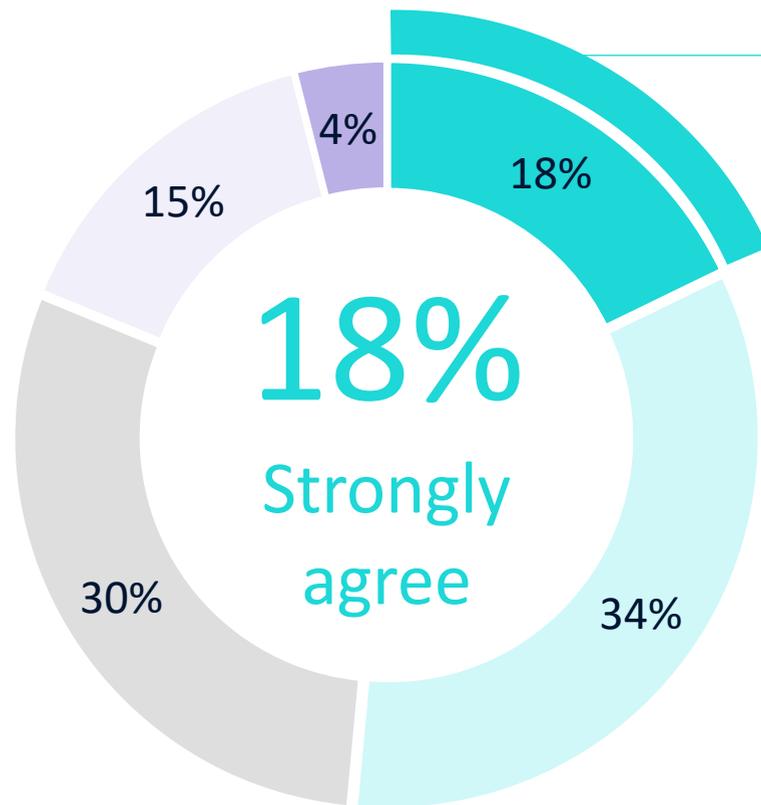
Every time that we hit "agree" on this phone or on this Apple Watch when we download something, we're taking that chance... We just hit "agree" and go. Because I'm going to need that app to download.

MS Pro-Tech

Incentive to innovate is key

Voters who believe regulation slows innovation are more favorable and trusting toward tech companies

Too much regulation on the tech sector will slow down innovation and take away the incentive for entrepreneurs to make the next great discovery



■ Strongly agree ■ Agree ■ Unsure ■ Disagree ■ Strongly disagree

80% have a positive opinion of tech companies
(66% among rest of sample)

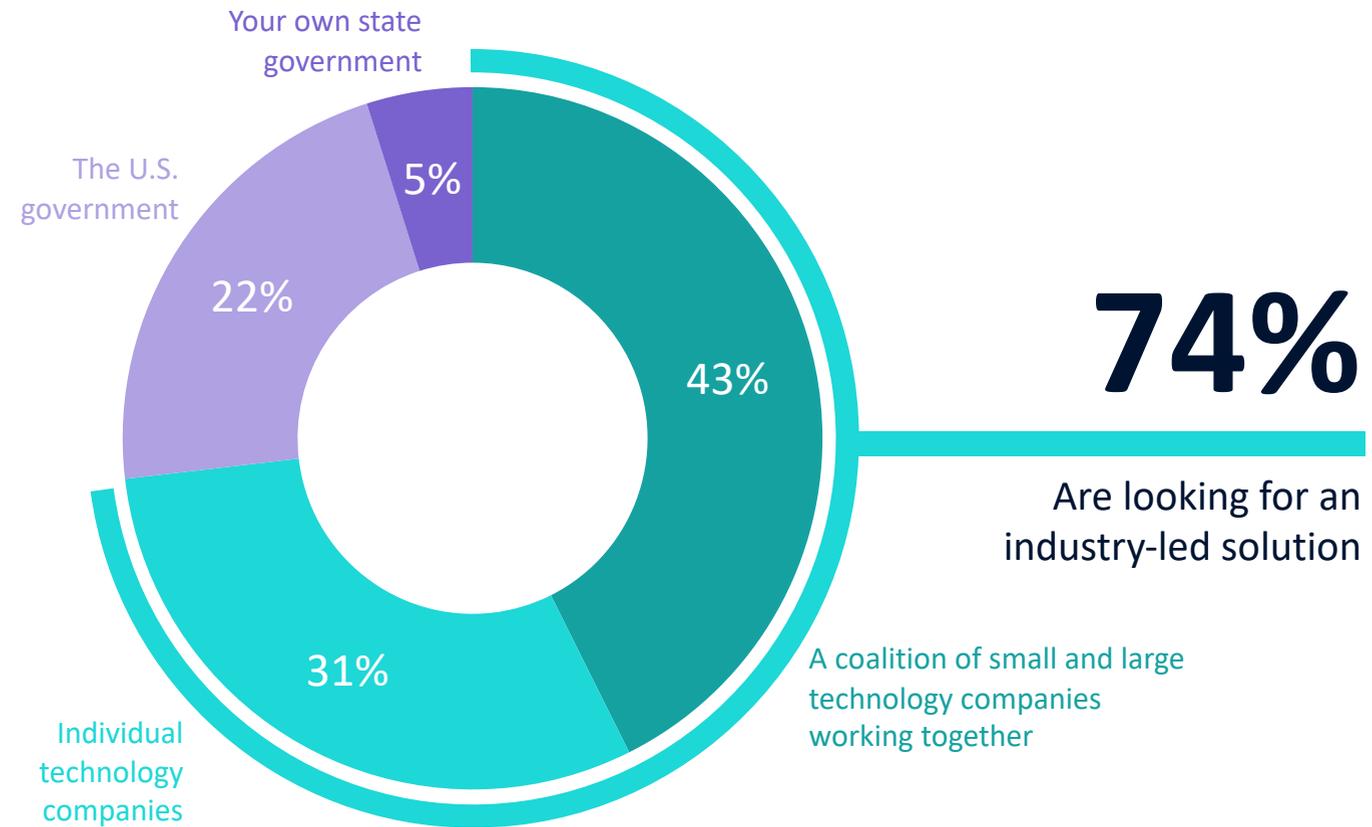
30% completely trust tech companies to act in their best interest
(11% among rest of sample)

43% say the U.S. government should be more active in regulating tech companies
(52% among rest of sample)

83% say tech companies promote equality because they have made a small percentage of society wealthy and powerful
(69% among rest of sample)

License to lead

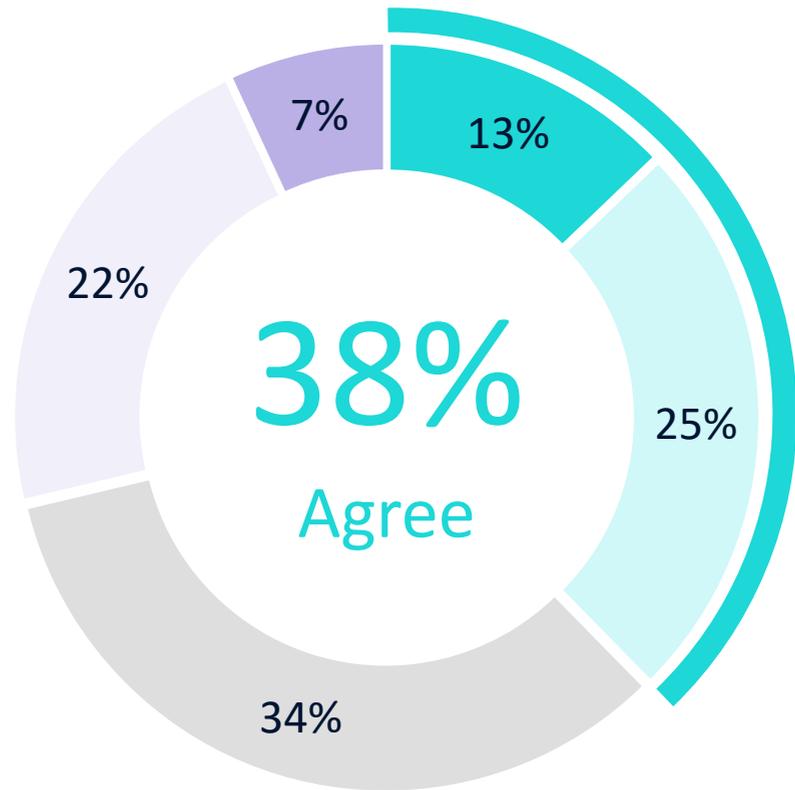
The tech industry can and should take the lead in proposing forward-facing data privacy solutions



Trustbusters

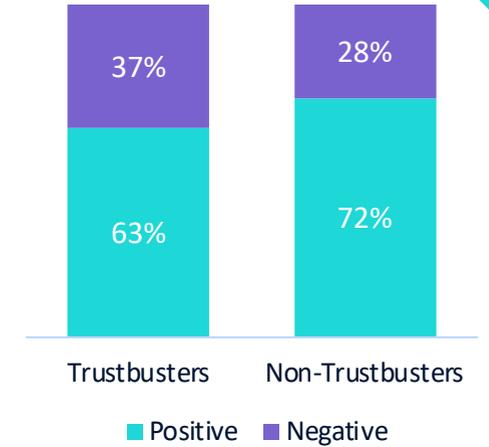
Key points on voters who think large tech companies should be broken up

Many tech companies have grown too large and they should be broken up into smaller companies

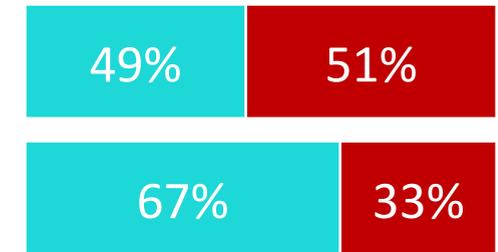


■ Strongly agree ■ Agree ■ Unsure ■ Disagree ■ Strongly disagree

63% have a positive opinion of tech companies, while 72% of non-trustbusters have a positive opinion of tech companies



51% believe technology is costing more jobs than it is creating; just one-third of non-trustbusters say the same



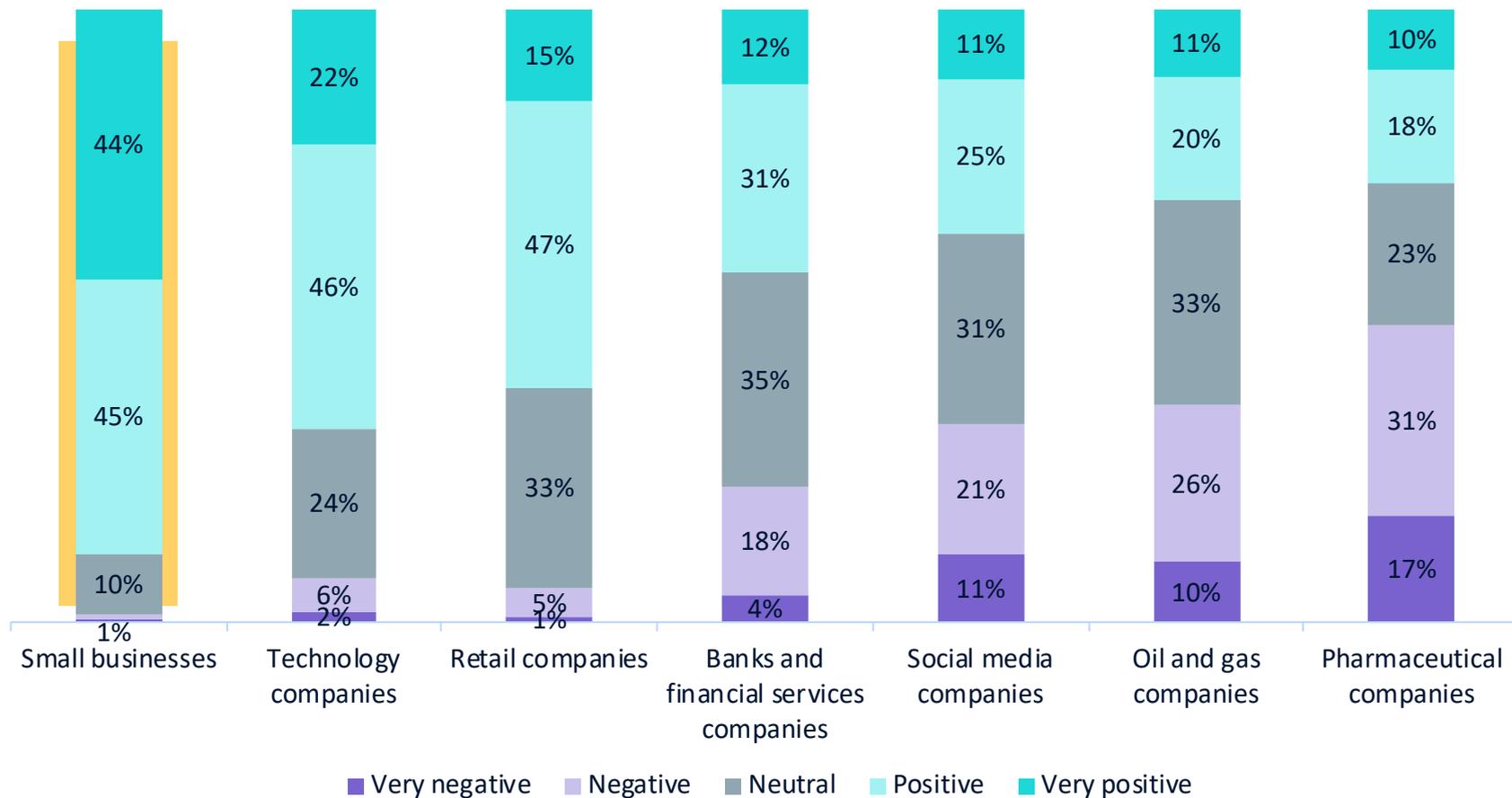
42% say tech companies promote inequality, compared to just 21% of non-trustbusters



Making main street front and center

Expanding people's conceptions of tech companies to include small businesses, which have an unparalleled reputation among consumers, is key to telling the pro-tech story

What is your overall opinion of the following types of companies?



Technology has really spurred entrepreneurship in this country in ways that we probably could have never thought or imagined...[it] allows those small businesses, the mom and pop shops, to still be able to expand and reach a greater audience.

DC Dem

Appendix I

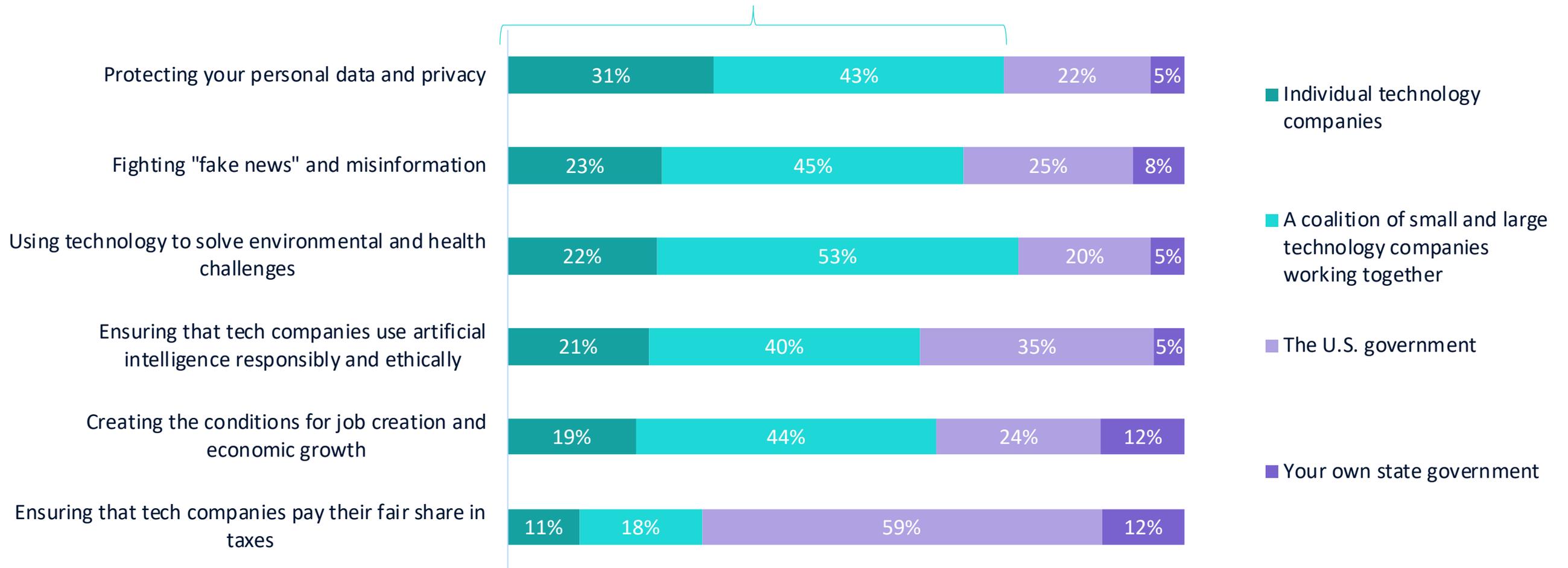
Key mediagenic data points

Pro-industry proof points

Support for industry led solutions is much higher than that of government

Please indicate which of the four groups you trust MOST to come up with working solutions for each.

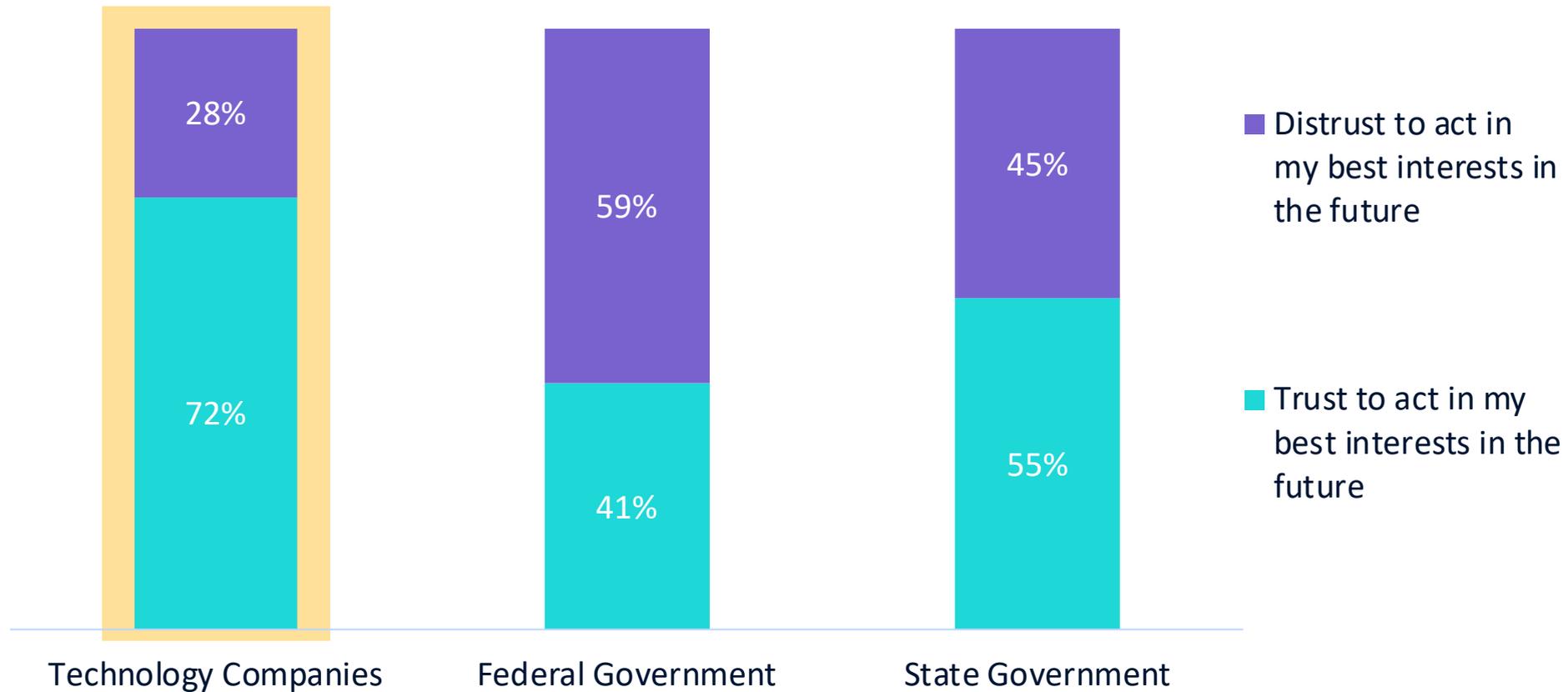
Industry-led solutions



Pro-industry proof points

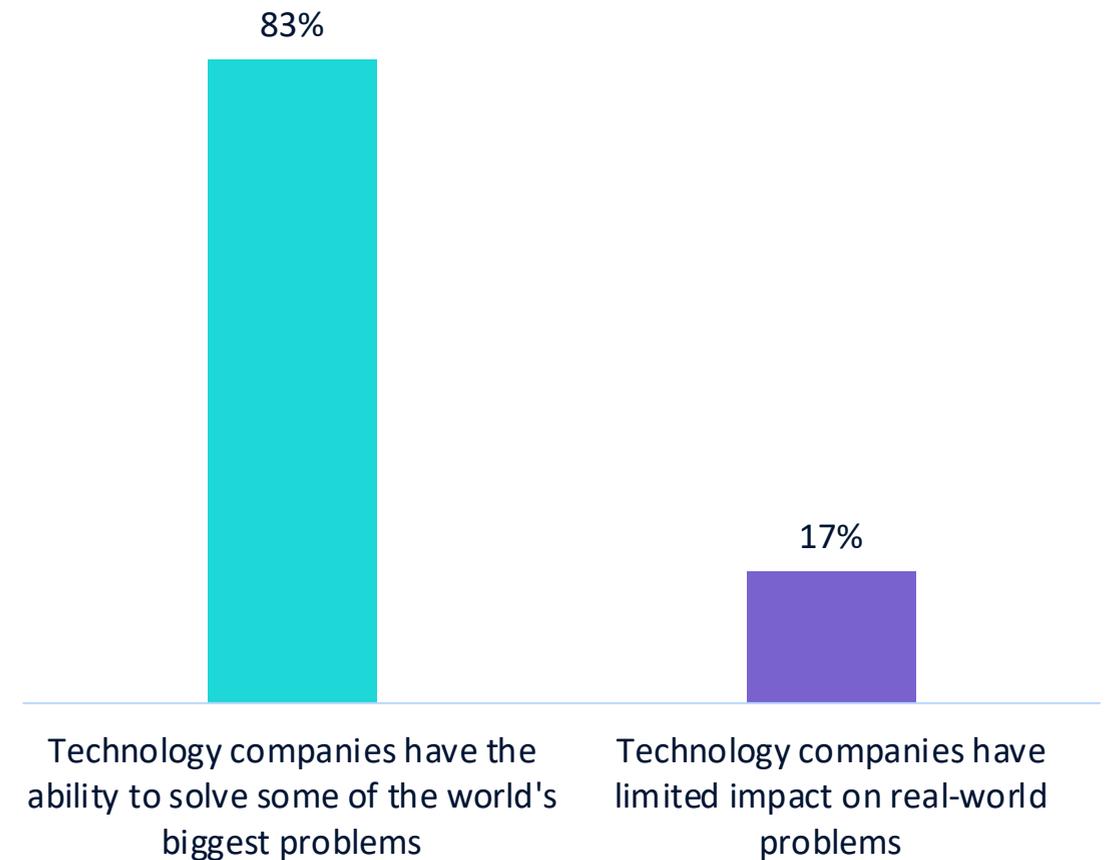
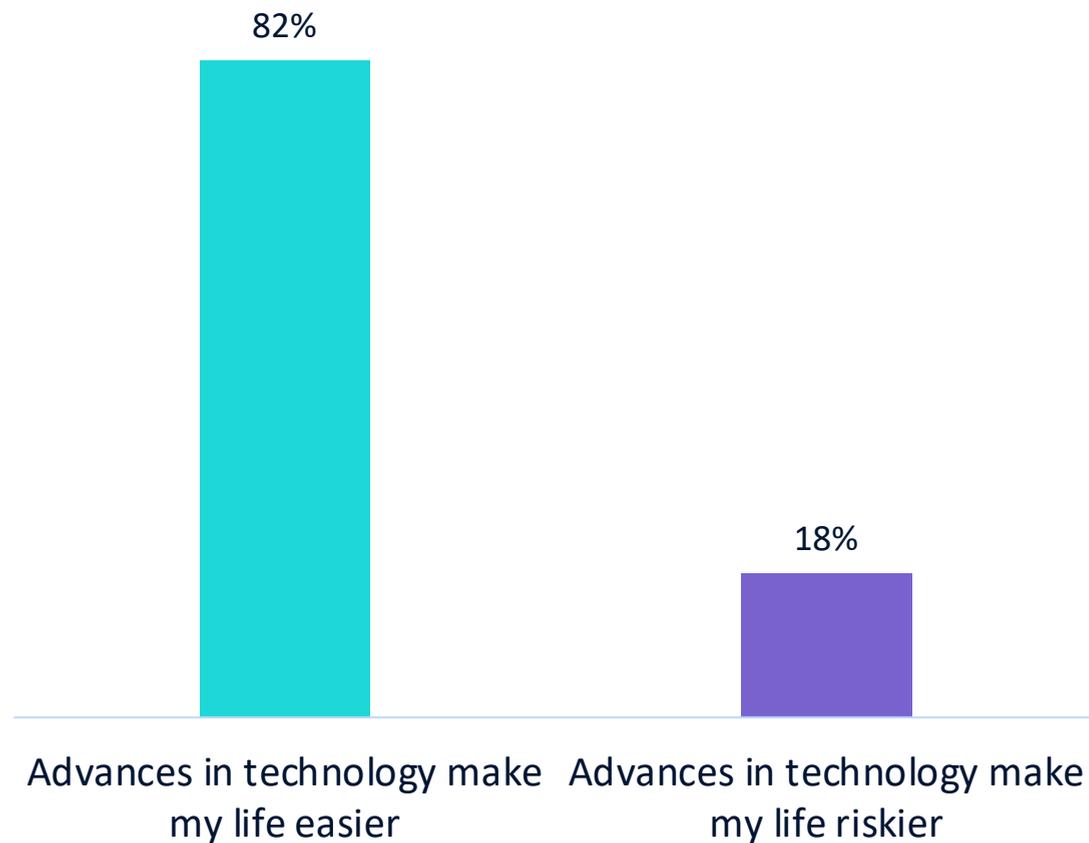
The technology industry is significantly more trusted than government

How much do you trust the following to act in your best interests in the future?



Pro-industry proof points

The general public agrees that tech makes their lives easier, and the majority have great faith in them to solve the world's biggest problems



Pro-industry proof points

Respondents are confident in technology companies when it comes to a variety of action items, including innovating, creating jobs, and educating

How confident are you in the abilities of technology companies when it comes to the following?

