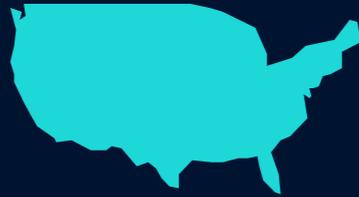# Is the
Techlash real?

US & EU consumer attitudes
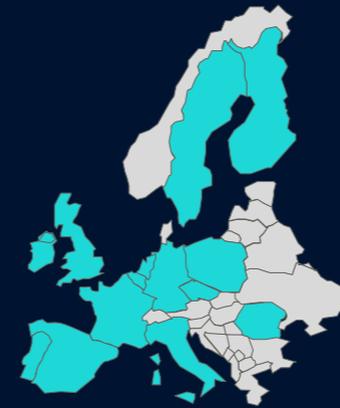to Big Tech & tech regulation

BRUNSWICK

Survey Methodology

A survey was conducted in the US and EU among *Informed Consumers* – those who get news regularly from at least three different sources (across print, broadcast and digital media channels). This was the second wave of this study.

US Consumers
n=1,054
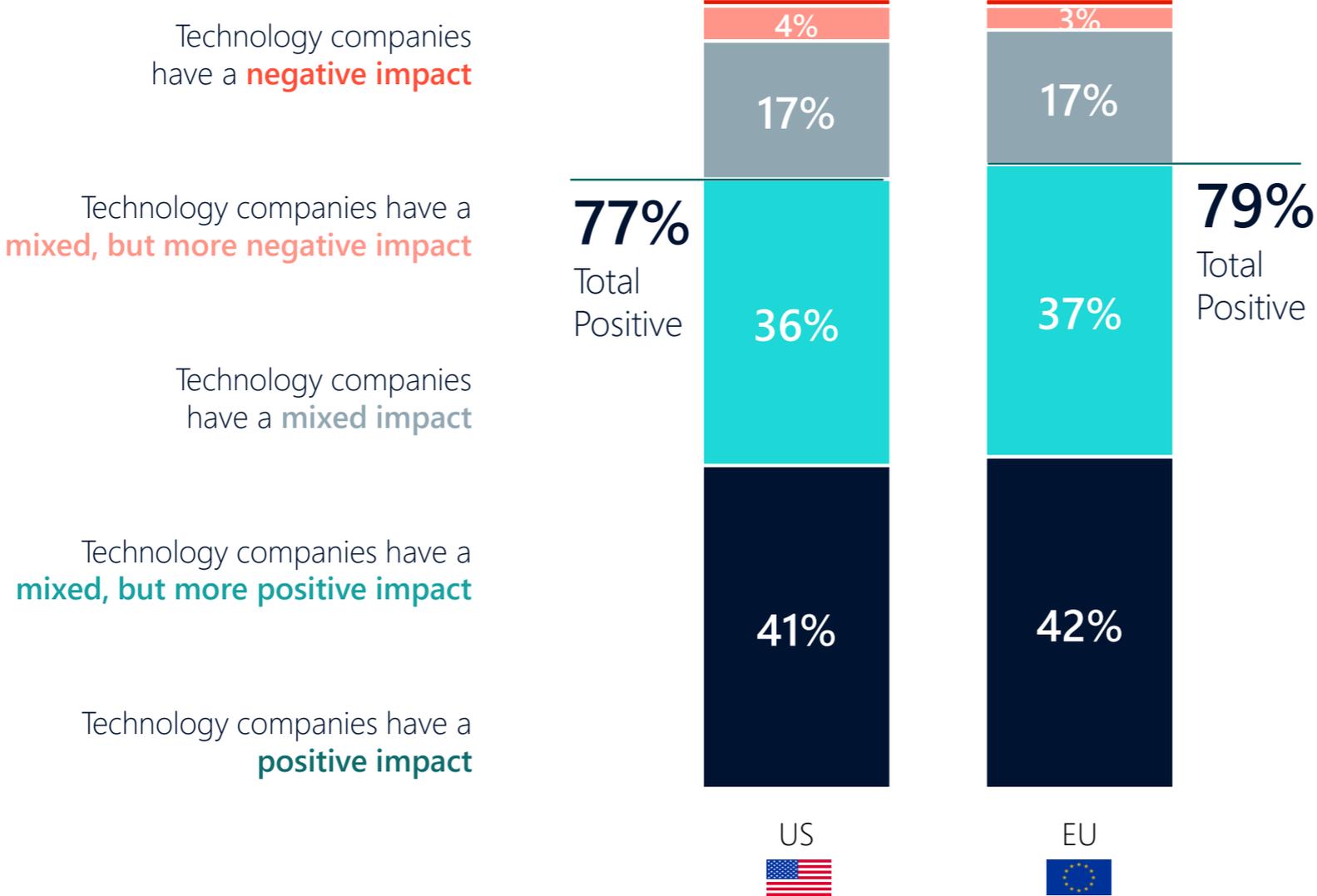September 18-27, 2019

EU Consumers
n=2,183
September 18-30, 2019

14 markets: Belgium, Czech Republic, Finland, France, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, UK
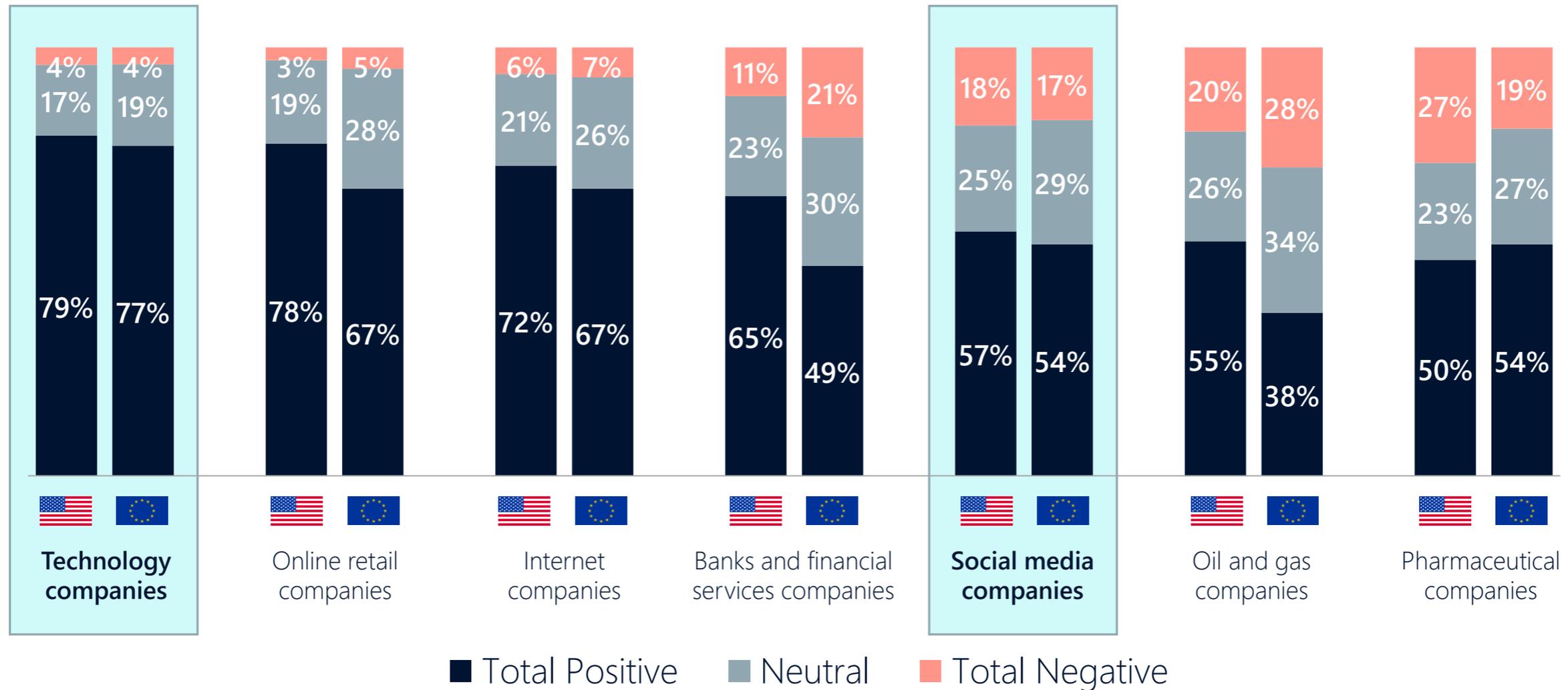
What do Americans and Europeans **think about the tech industry**?

Both US and EU consumers view tech companies as a positive force in society

Technology companies have a **negative impact**

Technology companies have a **mixed, but more negative impact**

Technology companies have a **mixed impact**

Technology companies have a **mixed, but more positive impact**

Technology companies have a **positive impact**

	US	EU
negative	4%	3%
	17%	17%
	36%	37%
	41%	42%

77%
Total Positive

79%
Total Positive

US

EU

Q: Broadly thinking about technology companies, do you think that technology companies have, on balance:

Most view technology companies in a positive light, while opinions of social media companies are more negative

Technology companies (highlighted): US 79% / 17% / 4%, EU 77% / 19% / 4%

Online retail companies: US 78% / 19% / 3%, EU 67% / 28% / 5%

Internet companies: US 72% / 21% / 6%, EU 67% / 26% / 7%

Banks and financial services companies: US 65% / 23% / 11%, EU 49% / 30% / 21%

Social media companies (highlighted): US 57% / 25% / 18%, EU 54% / 29% / 17%

Oil and gas companies: US 55% / 26% / 20%, EU 38% / 34% / 28%

Pharmaceutical companies: US 50% / 23% / 27%, EU 54% / 27% / 19%

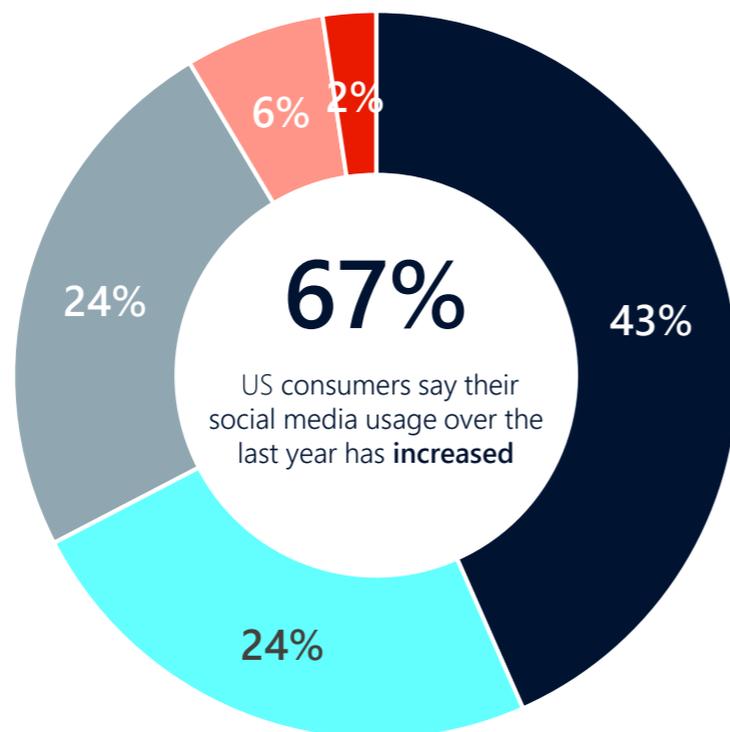Legend: ■ Total Positive ■ Neutral ■ Total Negative

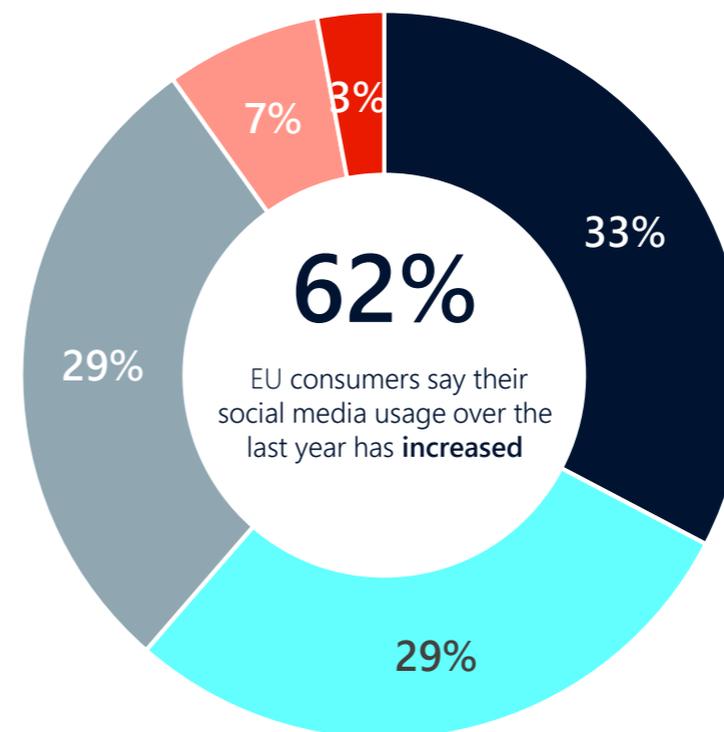*Q: What is your overall opinion of the following types of companies?*

Social media usage has increased despite mixed perceptions of the sector

Use social media at least once a day in the US:
87%

67%
US consumers say their social media usage over the last year has **increased**

43%
24%
24%
6%
2%

Use social media at least once a day in the EU:
85%

62%
EU consumers say their social media usage over the last year has **increased**

33%
29%
29%
7%
3%

■ Increased Significantly　■ Increased Modestly　■ Stayed About the Same　■ Decreased Modestly　■ Decreased Significantly
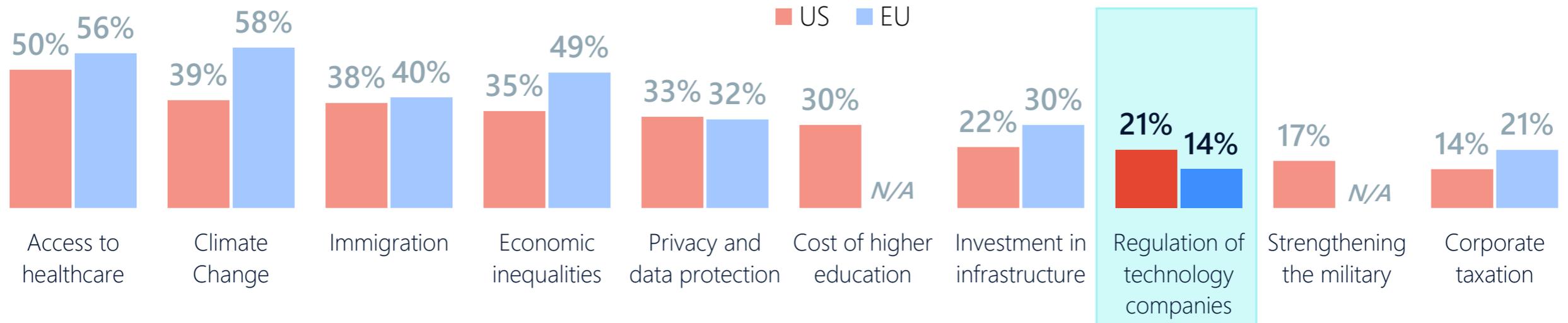
Q: How often do you use social media, which may include Facebook, Twitter, Instagram or Snapchat?
Q: Over the past year or so, has your use of social media...

Despite positive views of technology and the growing usage of specific platforms, **consumers want more regulation**
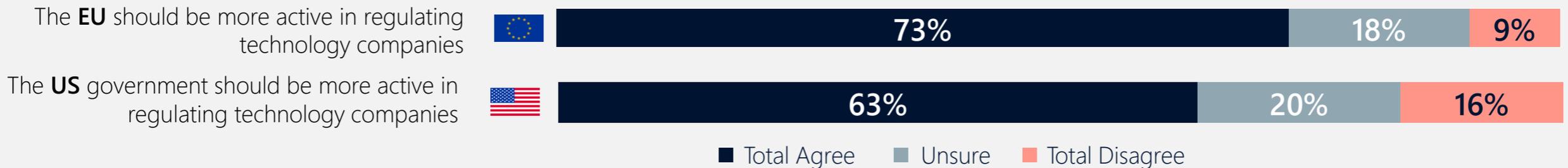
There is support for tech regulation, although it isn't necessarily a top priority

Unprompted, US consumers are more likely to support tech regulation than EU consumers

% Top 3 Issues The Government Should Address Today

■ US ■ EU

Issue	US	EU
Access to healthcare	50%	56%
Climate Change	39%	58%
Immigration	38%	40%
Economic inequalities	35%	49%
Privacy and data protection	33%	32%
Cost of higher education	30%	N/A
Investment in infrastructure	22%	30%
Regulation of technology companies	21%	14%
Strengthening the military	17%	N/A
Corporate taxation	14%	21%

Prompted, there is **high support for tech regulation** in both markets

	Total Agree	Unsure	Total Disagree
The **EU** should be more active in regulating technology companies	73%	18%	9%
The **US** government should be more active in regulating technology companies	63%	20%	16%

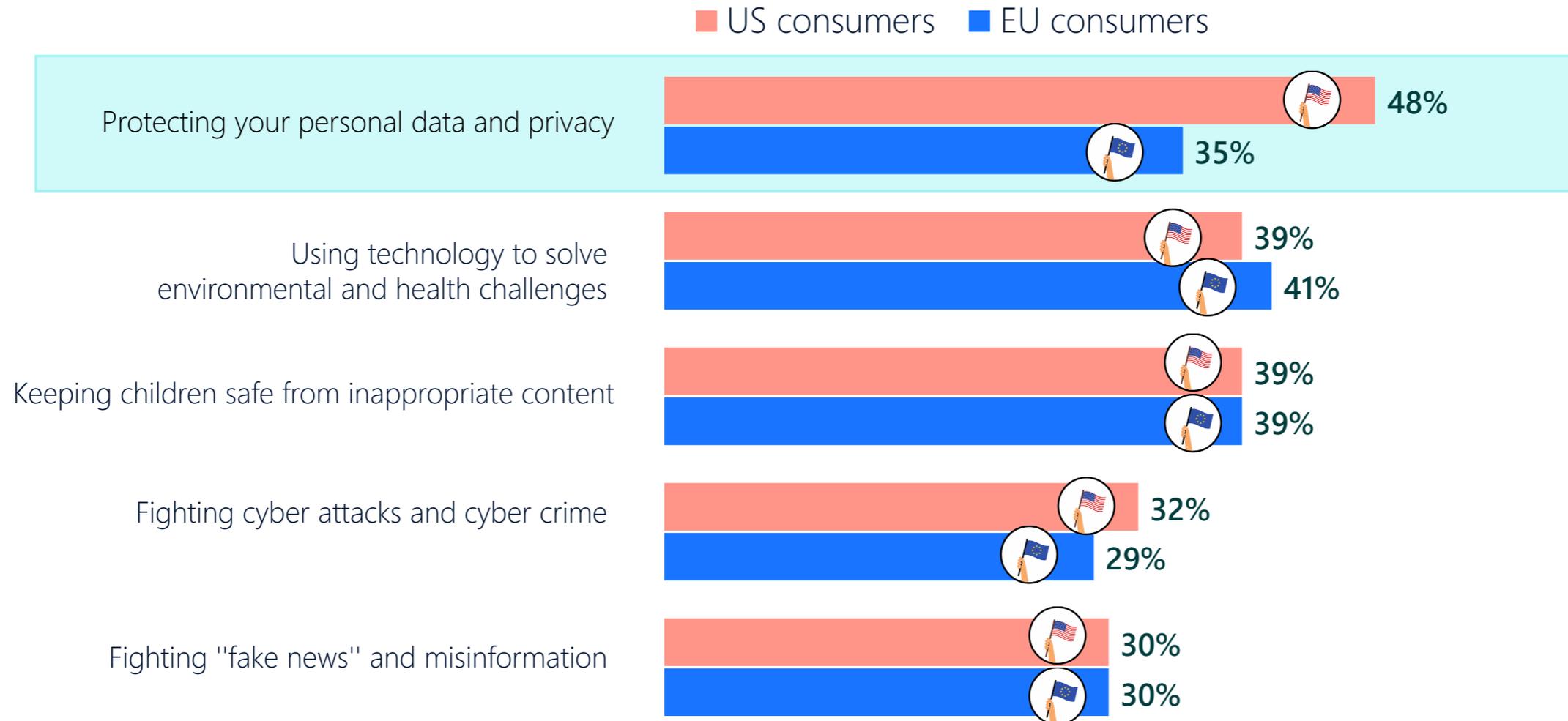■ Total Agree ■ Unsure ■ Total Disagree

Q: In your opinion, what are the top 3 issues the government should address today?
Q: Now, please indicate whether you agree or disagree with the following statements about technology companies.

So **what kind of regulation** are we talking about?

Personal data and privacy protections continue to drive US consumers' call for more regulation of the tech industry; with GDPR in place, Europeans focus on other issues
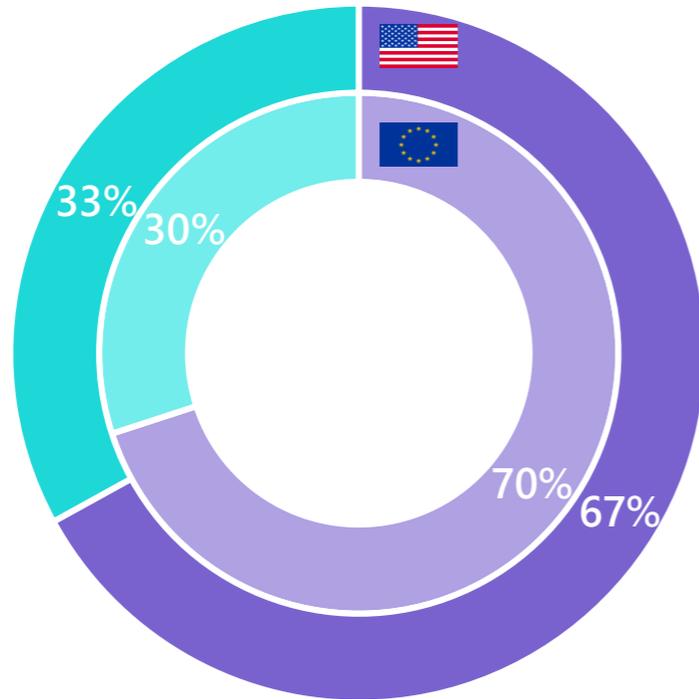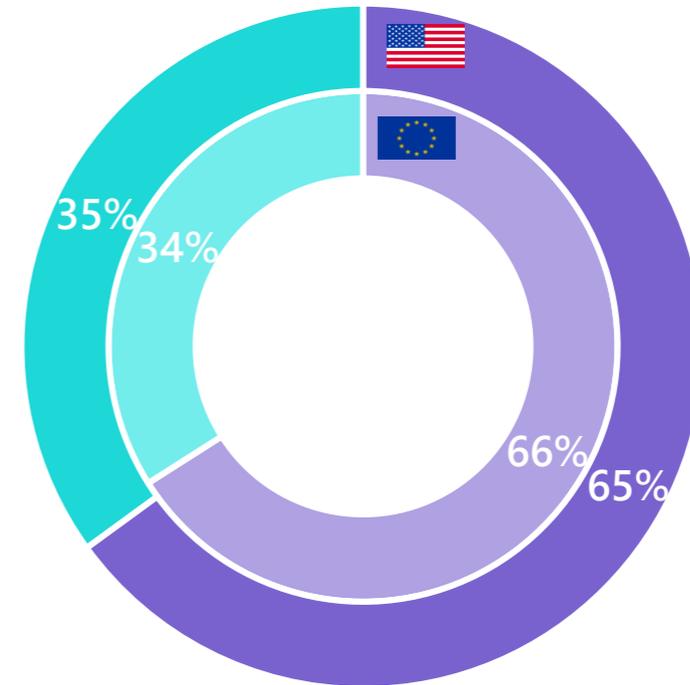
% who selected as top 3 important issue

■ US consumers   ■ EU consumers

Protecting your personal data and privacy
- US: 48%
- EU: 35%

Using technology to solve environmental and health challenges
- US: 39%
- EU: 41%

Keeping children safe from inappropriate content
- US: 39%
- EU: 39%

Fighting cyber attacks and cyber crime
- US: 32%
- EU: 29%

Fighting ''fake news'' and misinformation
- US: 30%
- EU: 30%

Q: From the following list, please indicate which THREE are most important to you?

Attitudes to content moderation and the role of platforms are similar across geographies

" Many companies **have biases, so social media companies should not be in charge of determining** what is considered fake news
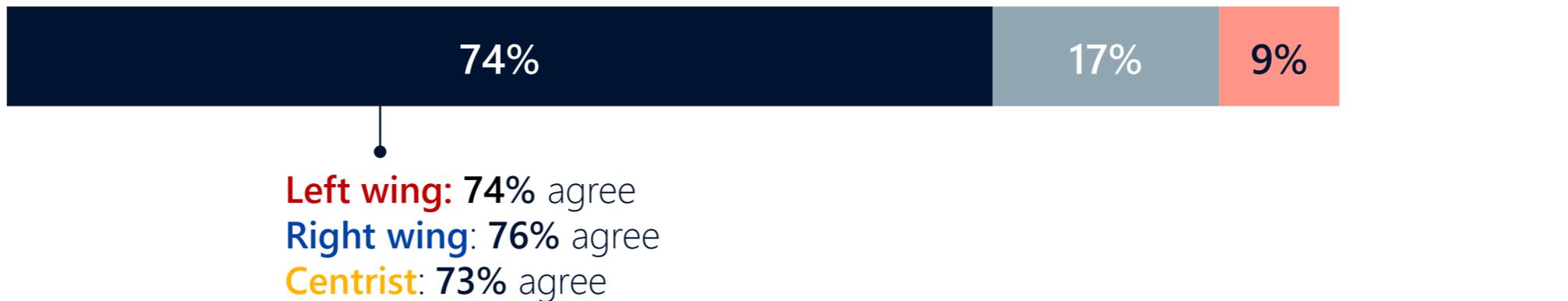

" Social media companies should **actively edit or remove fake news from their online platforms** so users can know what information is accurate

" Tech companies **should not intervene in removing content and let users and publications share content** in the interest of free exchange of ideas and information
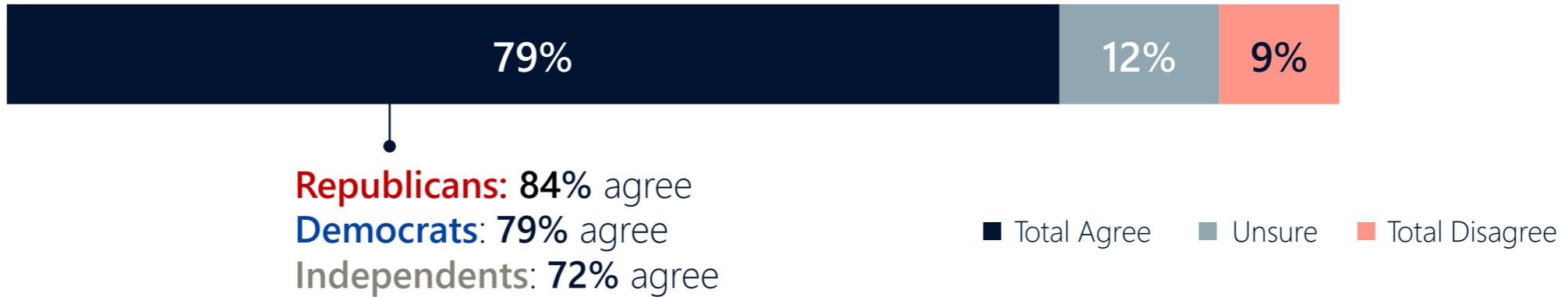

" Tech companies should **actively edit or remove content they feel is harmful or inappropriate** from their online platforms

Q: Now, please indicate whether you agree or disagree with the following statements about technology companies.

There is broad support for holding social media companies responsible for content

" Social media companies should be **held legally responsible for allowing false or misleading content** on their platforms

79%	12%	9%

Republicans: 84% agree
Democrats: **79%** agree
Independents: **72%** agree

■ Total Agree   ■ Unsure   ■ Total Disagree

74%	17%	9%

Left wing: 74% agree
Right wing: **76%** agree
Centrist: **73%** agree

Q: Now, please indicate whether you agree or disagree with the following statements about technology companies.

"Break up Big Tech" commands support among consumers

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

54%	24%	23%

Republicans: 62% agree
Democrats: **52%** agree
Independents: **45%** agree

■ Total Agree   ■ Unsure   ■ Total Disagree

46%	31%	23%

Left wing: 49% agree
Right wing: **47%** agree
Centrist: **42%** agree

Q: Now, please indicate whether you agree or disagree with the following statements about technology companies.

Emerging issues are becoming more top of mind

Consumers agree that tech companies should compensate them if they choose to use their data – even with the services they receive in exchange

Allowing tech companies **access to my personal data is justified by free services**

30%

70%
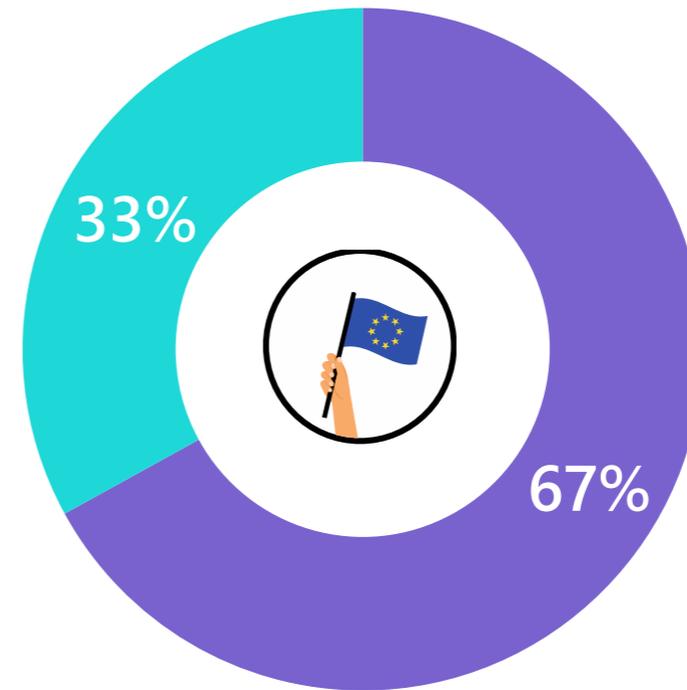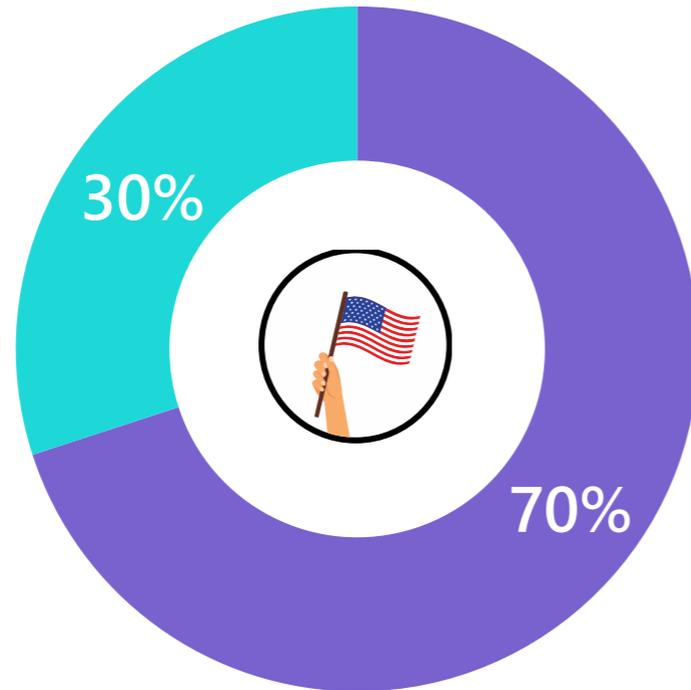
Tech companies should be **required to pay consumers for the right to use their data**

33%

67%

A majority of consumers also feel tech companies need to be more transparent with how their algorithms are used

Algorithms are **core to the services provided by technology companies** and the benefits that they return to users, and these businesses should not be forced to reveal their trade secrets

34%

66%

37%

63%
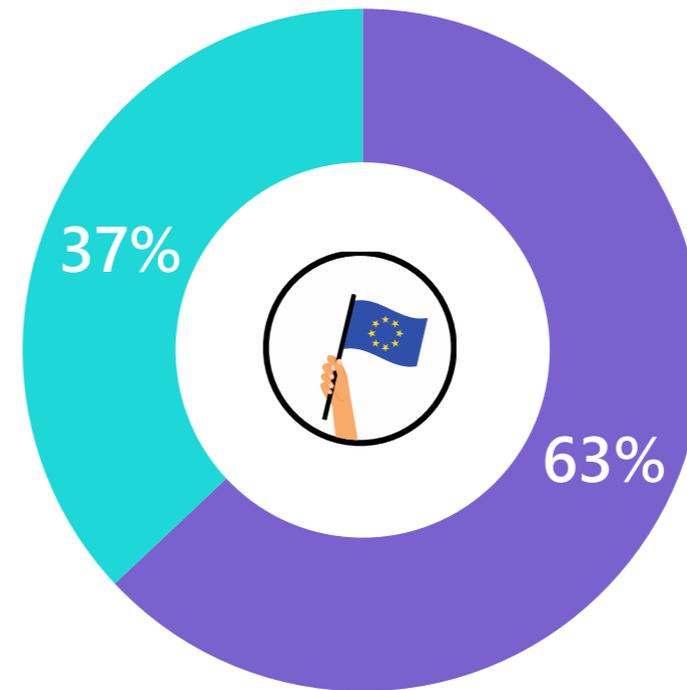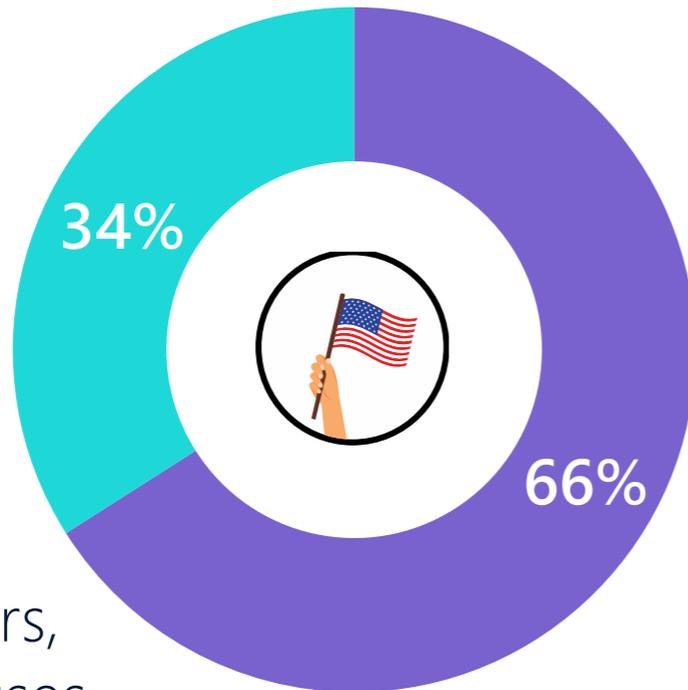
Tech companies should be **required to disclose how they use algorithms** to make decisions that have a direct impact on users

Q: For the following issues, please indicate which statement comes closer to your view. On the issue of algorithms, do you think:

There is some concern that tech companies using AI will ultimately cost people their jobs

Tech companies are **using AI and automation to provide products and services in new, efficient and exciting** ways that will improve peoples' lives

57%

43%

58%

42%
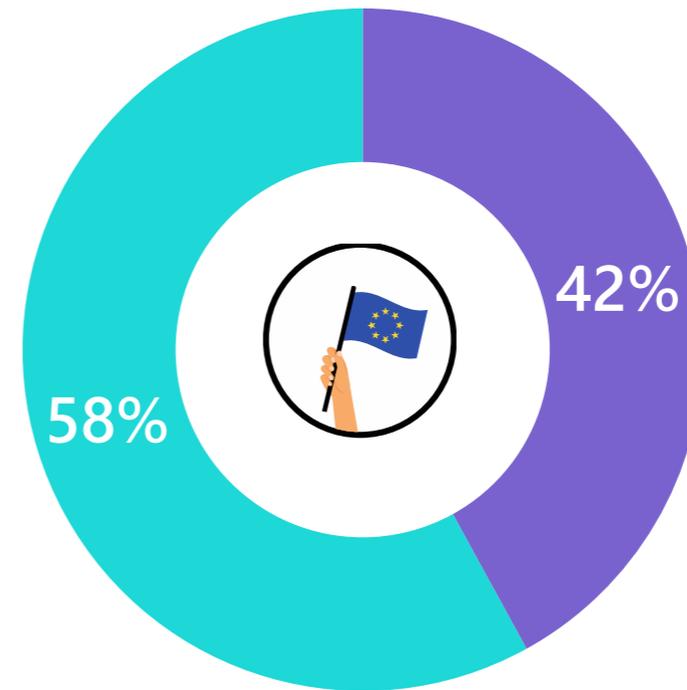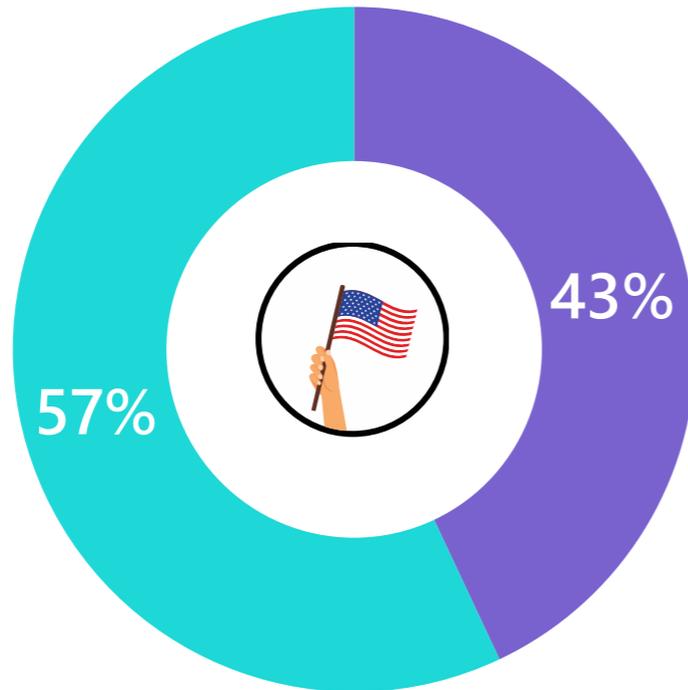
Tech companies are using AI and automation in ways that will **ultimately end up costing people their jobs and the loss of control over their lives**

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