RISK & REPUTATION UNIT

CES 2025

January 2025

Study Methodology

This survey was conducted online within the United States on from January 3rd, 2025, to January 6th, 2025, among 1,498 U.S. registered voters by HarrisX. Respondents are recruited through opt-in, web-panel recruitment sampling. Recruitment occurs though a broad variety of professional, validated respondent panels to expand the sampling frame as wide as possible and minimize the impact of any given panel on recruiting methods.

The results reflect a nationally representative sample of registered voters. Results were weighted for age, gender, region, race/ethnicity, income, political party, education, ideology and area type where necessary to align them with their actual proportions in the population.

The sample sizes and sampling margins of error are as follows:

1,498
U.S. Registered Voters

2.5%
Sampling Margin of Error

622
Republicans

3.9%
Sampling Margin of Error

544
Democrats

4.2%
Sampling Margin of Error
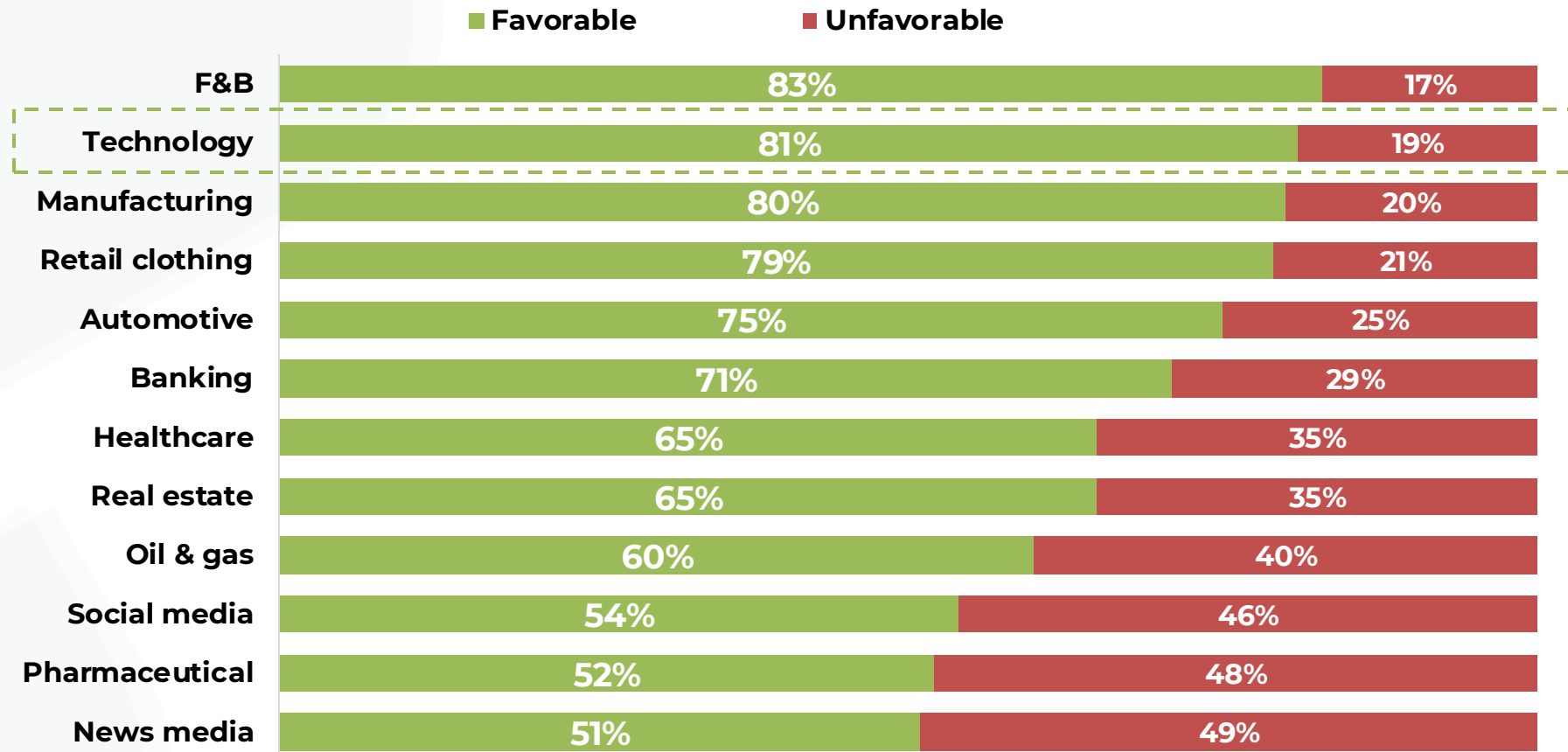
285
Independents

5.8%
Sampling Margin of Error

The technology industry has one of the strongest reputation across industries

## How favorable or unfavorable are you towards each of the following industries?

Among All

■ **Favorable**　　■ **Unfavorable**

Industry	Favorable	Unfavorable
F&B	83%	17%
Technology	81%	19%
Manufacturing	80%	20%
Retail clothing	79%	21%
Automotive	75%	25%
Banking	71%	29%
Healthcare	65%	35%
Real estate	65%	35%
Oil & gas	60%	40%
Social media	54%	46%
Pharmaceutical	52%	48%
News media	51%	49%

Economic impact great strength for tech; mental health, impact on youth are flags

Perceptions of the Technology Industry
Among All

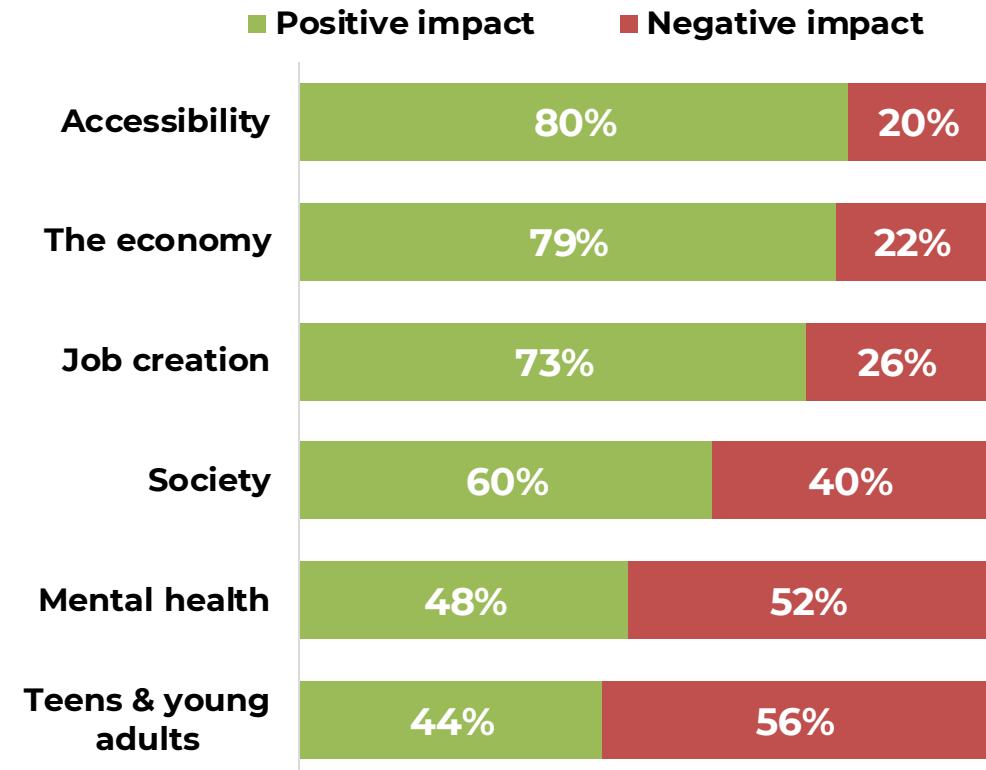- ■ **Favorable** — 81%
- ■ **Unfavorable** — 19%
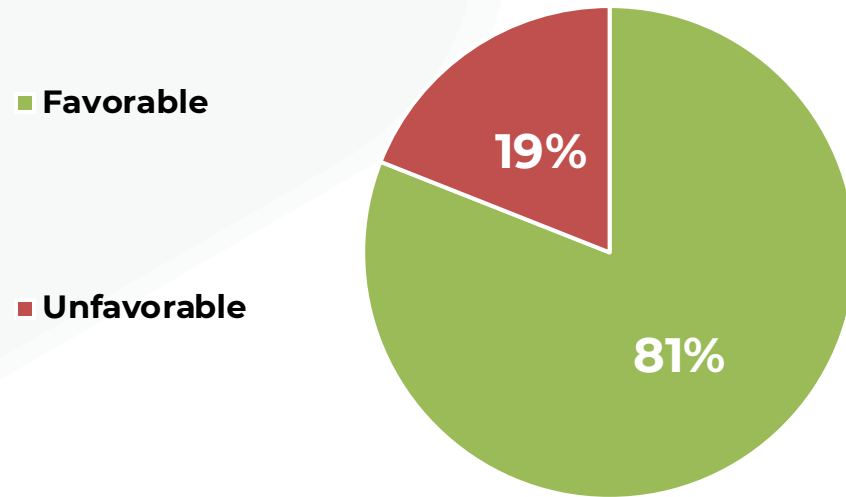
	Men	Women	18-34	35-49	50-64	65+	GOP	DEM	IND
Fav	83%	79%	77%	86%	81%	81%	83%	82%	78%
Unfav	17%	21%	23%	14%	19%	19%	17%	18%	22%

Role of Non-Tech Companies in AI Implementation
Among All

■ **Positive impact**   ■ **Negative impact**

	Positive impact	Negative impact
Accessibility	80%	20%
The economy	79%	22%
Job creation	73%	26%
Society	60%	40%
Mental health	48%	52%
Teens & young adults	44%	56%

Americans expect the tech industry to be a major economic driver in next five years

Anticipated Impact of Industries on the U.S. Economy Over the Next 5 Years
Among All

■ **Major impact**   ■ **Some impact**   ■ **Little to no impact**

Industry	Major impact	Some impact	Little to no impact
Oil & gas	59%	35%	6%
Technology	57%	37%	6%
Healthcare	50%	40%	10%
Manufacturing	43%	48%	9%
Banking	38%	51%	12%
Real estate	35%	53%	11%
Automotive	32%	56%	12%

Americans <u>do not think</u> government should increase regulation of the tech industry

U.S. Government Tech Regulation: More, Less, or the Same
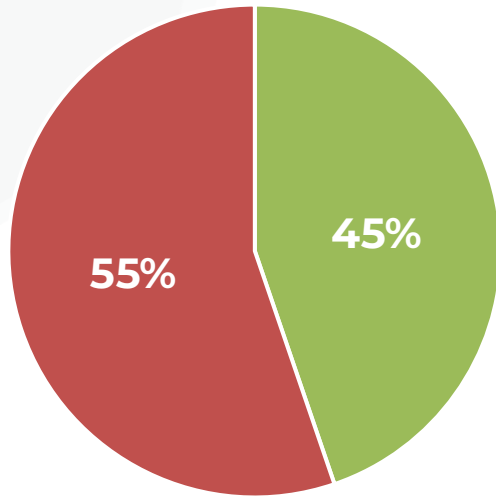*Among All*

■ **Regulate less** ■ **Keep as is** ■ **Regulate more**

60%

Technology | 26% | 34% | 40%
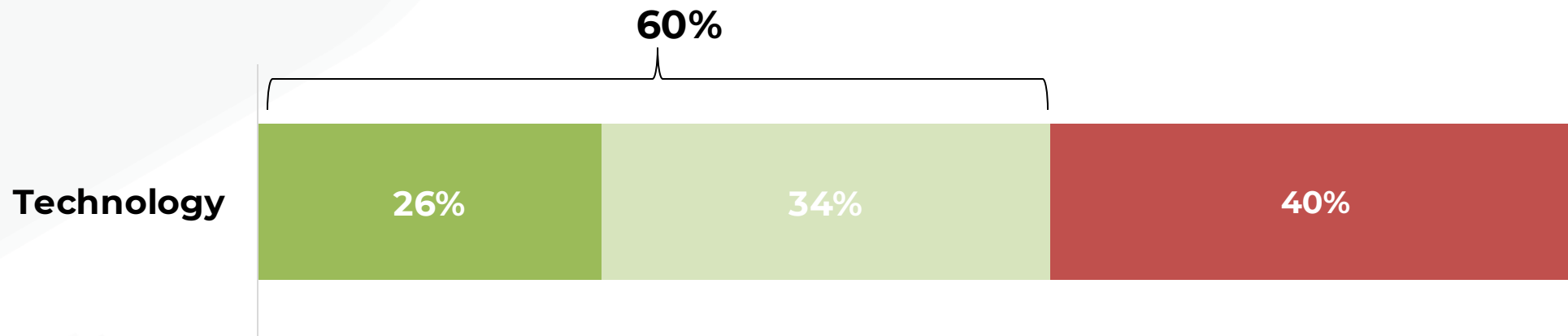
	Men	Women	18-34	35-49	50-64	65+	GOP	DEM	IND
Regulate less	30%	23%	27%	25%	26%	27%	**35%**	18%	26%
Keep as is	**35%**	32%	31%	33%	35%	35%	31%	36%	35%
Regulate more	**35%**	**45%**	**42%**	**42%**	**39%**	**38%**	**35%**	**46%**	**39%**

Americans split on if tech leaders should speak out; high risk in getting it wrong

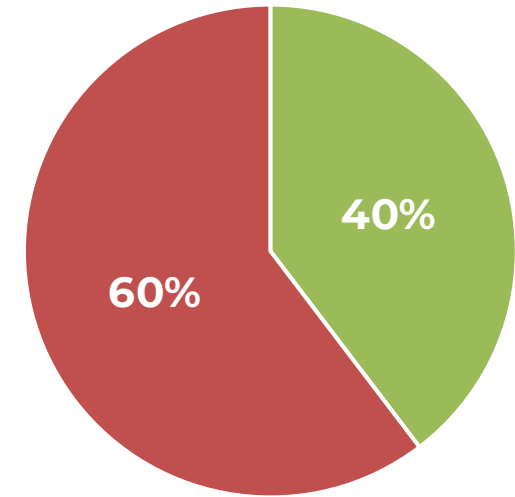## When it comes to political, economic and social issues, do you think the leaders of technology companies…
Among All

- 🟩 Are speaking up too much/speaking up on too many issues
- 🟥 Are not speaking up enough/not addressing enough issues

55% (red) | **45%** (green)

- 🟩 Mostly get it right when they speak up
- 🟥 Mostly get it wrong when they speak up

60% (red) | **40%** (green)

	Men	Women	18-34	35-49	50-64	65+	GOP	DEM	IND
Too much	**51%**	39%	42%	42%	42%	**54%**	**56%**	37%	41%
Not enough	49%	**61%**	**58%**	**58%**	**58%**	46%	44%	**63%**	**59%**

	Men	Women	18-34	35-49	50-64	65+	GOP	DEM	IND
Get it right	44%	36%	44%	41%	40%	34%	40%	42%	36%
Get it wrong	**56%**	**64%**	**56%**	**59%**	**60%**	**66%**	**60%**	**58%**	**64%**

Workplace issues, economy biggest issues for CEOs to address; stay clear of political issues

Issues on Which Tech Leadership <u>Should</u> Take a Public Stance
*Among All*

AMERICANS WANT TECH TO TAKE A PUBLIC STANCE ON:		AMERICANS DON'T WANT TECH TO TAKE A STANCE ON:
• **Paid family leave – 68%**	• **Race relations – 51%**	• **Transgender rights – 38%**
• **Minimum wage – 66%**	• **Immigration reform – 50%**	• **Abortion – 39%**
• **The environment – 65%**	• **Gun safety reform – 50%**	• **Presidential elections – 41%**
• **Human rights – 64%**		• **Religious tolerance – 44%**
• **Income inequality – 63%**		• **Police reform – 45%**
• **Govt regulations – 61%**		
• **Corp tax rates – 60%**		
• **Healthcare reform – 60%**		
• **Tariffs – 59%**		
• **Public education – 58%**		
• **Govt spending – 58%**		
• **DE&I – 56%**		

hix | STAGWELL

Few Americans say AI has a major impact on their daily; expect big change in five years

Impact of AI on Your Daily Life: Today vs. In 5 Years

Among All

■ **Major impact**   ■ **Some impact**   ■ **Little to no impact**
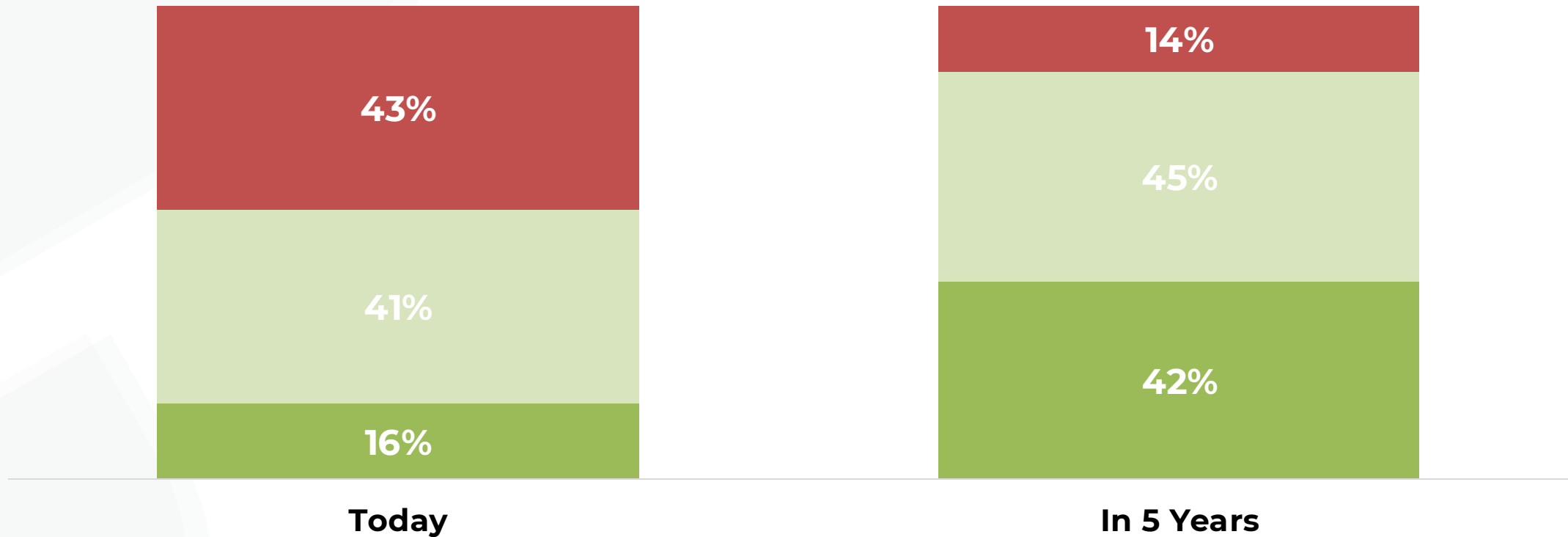
Today

- 43%
- 41%
- 16%

In 5 Years

- 14%
- 45%
- 42%

Americans across the board anticipate AI to have a net negative impact on jobs

Impact of AI on Jobs
Among U.S. Voters

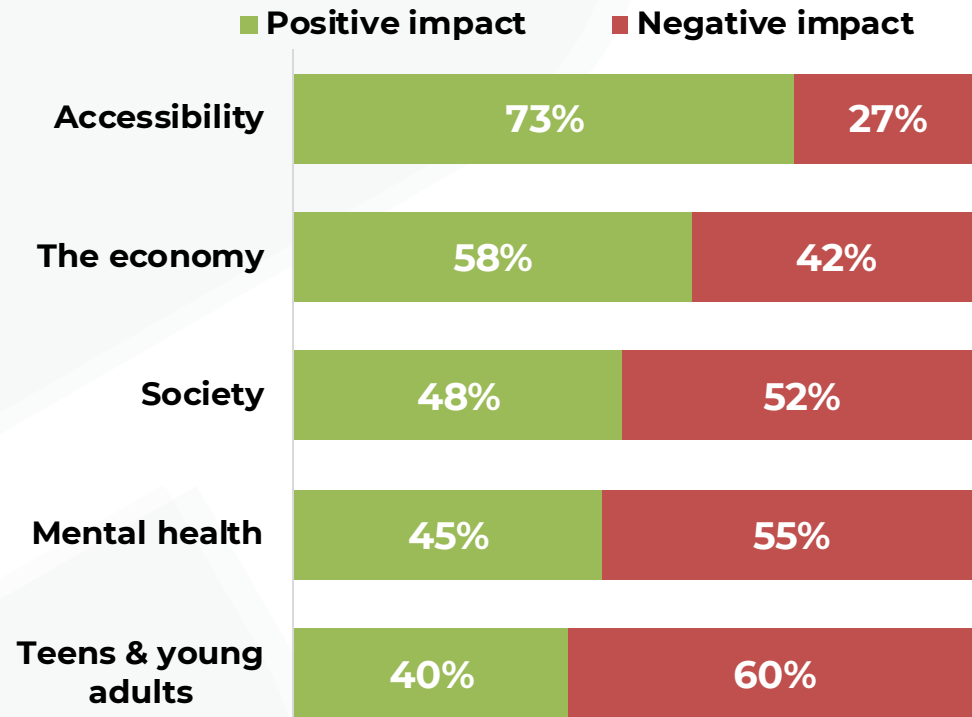■ **Create more jobs**　■ **About the same**　■ **Replace more jobs**
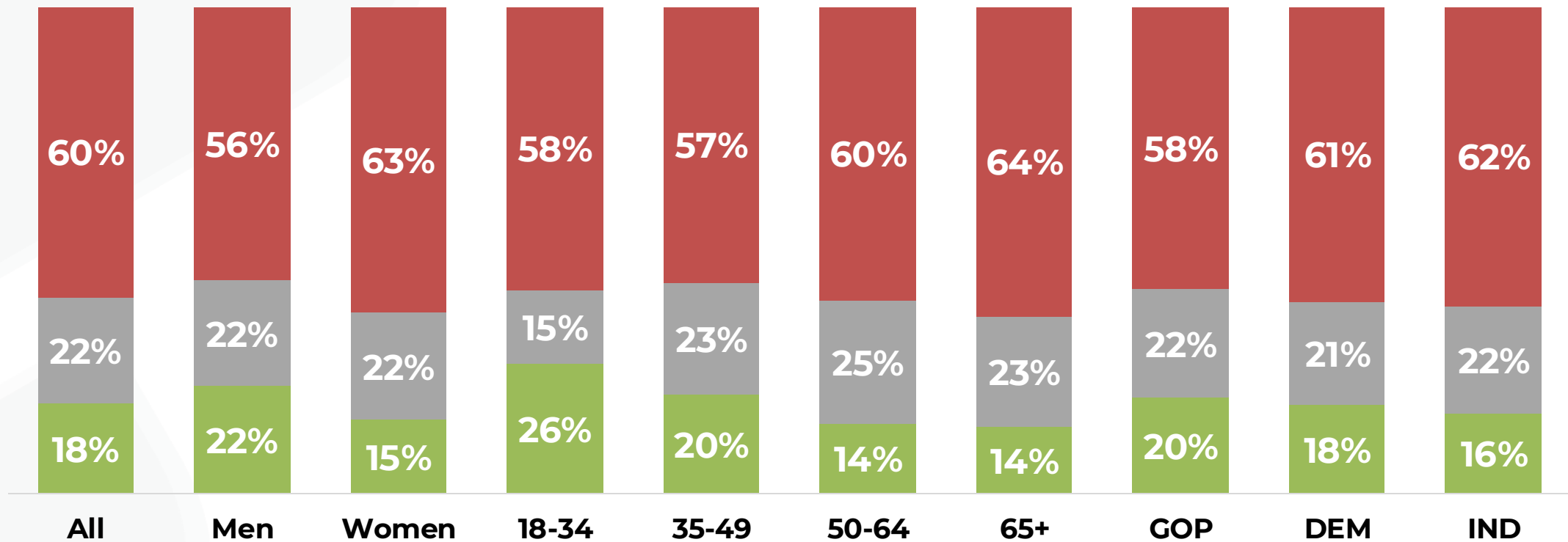
	All	Men	Women	18-34	35-49	50-64	65+	GOP	DEM	IND
Replace more jobs	60%	56%	63%	58%	57%	60%	64%	58%	61%	62%
About the same	22%	22%	22%	15%	23%	25%	23%	22%	21%	22%
Create more jobs	18%	22%	15%	26%	20%	14%	14%	20%	18%	16%

Uncertainty around impact of AI; majority believe it will amplify misinformation

Impact of AI on the following...
Among All

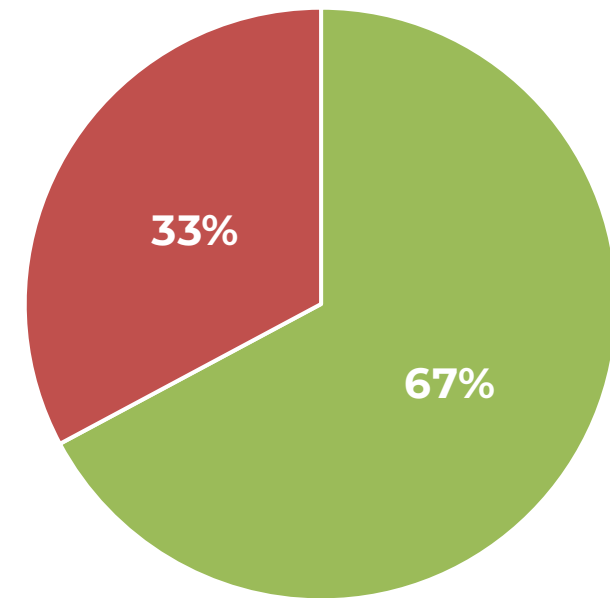■ **Positive impact**   ■ **Negative impact**

	Positive	Negative
Accessibility	73%	27%
The economy	58%	42%
Society	48%	52%
Mental health	45%	55%
Teens & young adults	40%	60%

Impact of AI on misinformation
Among All

■ **Amplify misinformation**

■ **Limit misinformation**

33%

67%

Americans are divided on how to regulate AI

Role of U.S. Government in AI Regulation

Among All

- **Start actively regulating the development and use of AI right away**

- **Monitor how AI develops and how AI is used and then regulate it as needed**
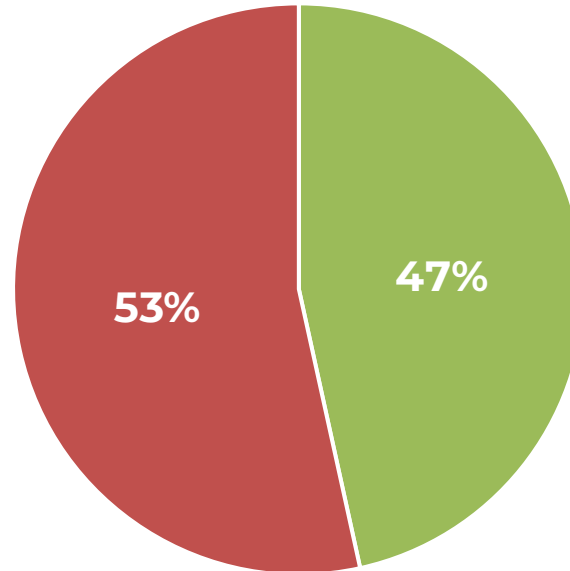
	Men	Women	18-34	35-49	50-64	65+	GOP	DEM	IND
Start actively regulating	46%	48%	47%	48%	44%	48%	46%	47%	47%
Monitor how AI develops	54%	52%	53%	52%	56%	52%	54%	53%	53%

Americans think Donald Trump will be good for business

Impact of Trump's Presidency on the following...
Among All

- Positive impact ■ No impact ■ Negative impact

Large businesses and corporations
| 68% | 10% | 22% |

Technology companies
| 58% | 15% | 27% |

Small businesses
| 49% | 11% | 39% |
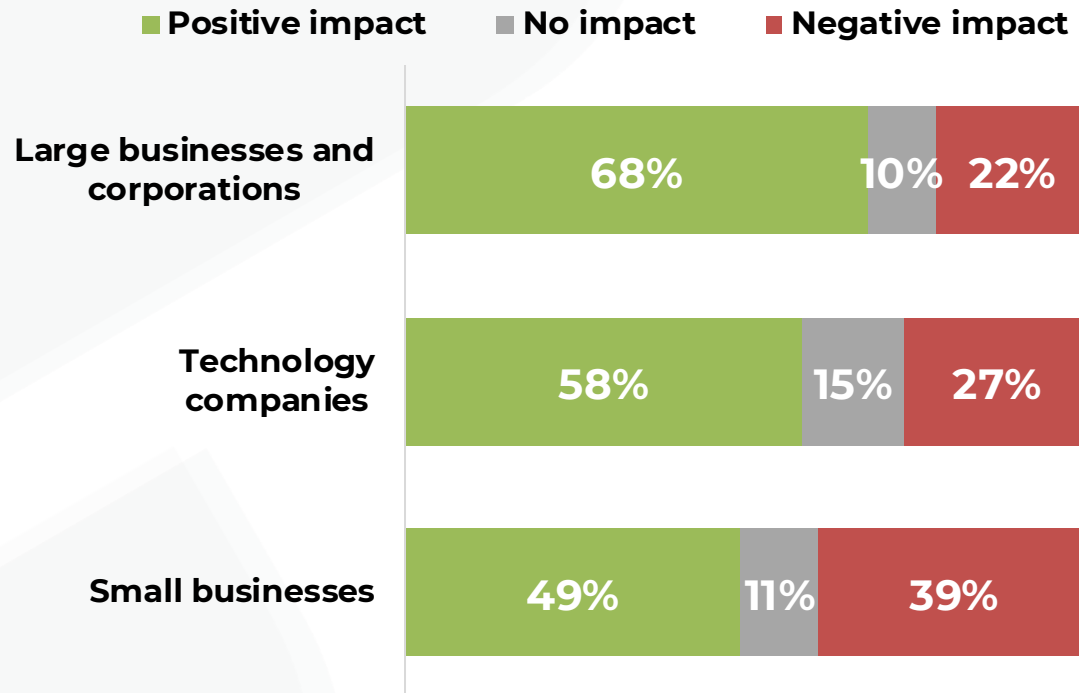
Working with the Trump Administration...
Among All

- Shoud work with Trump ■ Should not work with Trump

Large businesses and corporations
| 66% | 34% |

Technology companies
| 67% | 33% |

Small businesses
| 66% | 34% |

High expectation around immigration, economy as policy priorities

Do you expect the following to improve, worsen, or stay about the same over the next year?

Among All

● **Improve** ■ **Stay about the same** ■ **Worsen**

	Improve	Stay about the same	Worsen
Illegal immigration	44%	35%	21%
U.S. economy	39%	26%	35%
Inflation	33%	28%	39%
Job market	33%	40%	27%
Geopolitical/military conflicts	27%	38%	35%

Thank you!

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