

GET Creative/USA TODAY NETWORK, Charles Koch Institute - Technology Survey

Topline Findings

Washington, DC, March 1, 2019 — A recent lpsos survey done on behalf of GET Creative, a division of USA TODAY NETWORK, and the Charles Koch Institute shows that Americans view technology as something that has improved their lives and will continue to do so into the future. Two-thirds of the country views technological advancement as having made their overall lives better compared to the lives of their parents. Americans see the biggest generational improvement due to technology in their ability to keep in touch with family and friends with 84% reporting that technology has made this aspect of their lives better. When considering the future of technological advancement, more than half (58%) expect their children's overall lives to be made even better by technology. A further 70% expect their children to have an even better ability to keep in touch with family and friends compared to their own experiences.

Innovation and progress is woven into the fabric of society in the eyes of many Americans. Ninety-two percent of Americans believe that innovation is a big part of American culture and history with three-quarters (77%) believing the United States is one of the world's leaders in innovation. Americans tend to believe that the country has attained its status as a leader of innovation through a variety of existing factors including the American entrepreneurial spirit (90%), the education system (87%), and the law and regulatory systems (81%) as the top three factors.

Americans are optimistic that future tech will arrive sooner rather than later. A strong majority expect package delivering flying drones (81%) and commercially available self-driving vehicles (71%) to arrive within their lifetime. Even longer-term technologies such as short-trip flying vehicles (42%) and underground car transport tunnels (33%) are seen as viable lifetime innovations for more than a third of Americans.

In terms of regulation, Americans generally believe that there is too much power and wealth controlled by a few highly innovative companies (77%). Despite this, Americans are more in favor of allowing market competition (87%) to drive innovation than using regulation as a means of preventing unforeseen problems in the technological mass market (55%).

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1. When you hear about technology, what are the first thoughts that come into your mind?

	Total (n = 2,014)
Electronic devices	41%
Brand names	12
New	7
Artificial intelligence	6
Making life easier	6
The Internet	4
Expensive	4
Нуре	4
Future	3
Other	5
None	9

- 2. When considering your life compared to your parents, has technology made the following better, worse, or the same?
 - a. Better summary

	Total
Your ability to keep in touch with family and friends	84%
Entertainment	78%
Shopping	78%
Education	69%
Your overall life	67%
Your job	60%

b. Your ability to keep in touch with family and friends

	Total
Better	84%
The same	10
Worse	4
Don't know	2

c. Entertainment

	Total
Better	78%
The same	15
Worse	5
Don't know	3

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d. Your job

	Total
Better	60%
The same	22
Worse	6
Don't know	11

e. Shopping

	Total
Better	78%
The same	15
Worse	4
Don't know	3

f. Education

	Total
Better	69%
The same	16
Worse	9
Don't know	5

g. Your overall life

	Total
Better	67%
The same	20
Worse	7
Don't know	6

3. When considering your life compared to the life you expect your children to experience, do you expect technology will make the following better, worse, or the same?

a. Better summary

	Total
Their ability to keep in touch with family and friends	70%
Entertainment	67%
Shopping	65%
Education	63%
Their job	62%
Their overall life	58%

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b. Their ability to keep in touch with family and friends

	Total
Better	70%
The same	18
Worse	5
Don't know	7

c. Entertainment

	Total
Better	67%
The same	18
Worse	7
Don't know	8

d. Their job

	Total
Better	62%
The same	18
Worse	7
Don't know	13

e. Shopping

	Total
Better	65%
The same	21
Worse	5
Don't know	9

f. Education

	Total
Better	63%
The same	17
Worse	10
Don't know	10

Their overall life

	Total
Better	58%
The same	18
Worse	9
Don't know	15

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4. What are the three areas of technological change that you are most excited about for the future? Please select up to three options.

	Total
Medical innovation (medical devices, pharmacological breakthroughs, etc.)	61%
Energy	33
Transportation	29
Personal electronics	27
Education	25
Space exploration	22
Entertainment	18
Communication and social media (chat app, Facebook, Instagram, etc.)	9
Computing in the workplace	9
Agriculture	8
Aviation	6
Construction	5
There are no areas where I'm excited about technology in the future	9

5. Please indicate your level of agreement with the following statements.

a. Agree summary

	Total
Innovation is a big part of American culture and history.	92%
Innovation is good for progress, but it also risks creating unforeseen problems.	89%
Society should focus more on innovating to solve problems.	85%
Society should approach innovation with more caution to ensure we aren't creating bigger problems than we solve.	82%
The United States is one of the world's leaders in innovation.	77%
In total, innovation tends to bring about more harm than good.	35%

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b. The United States is one of the world's leaders in innovation.

	Total
Strongly agree	33%
Somewhat agree	44
Somewhat disagree	13
Strongly disagree	4
Don't know	5
Agree (Total)	77%
Disagree (Total)	18

c. Innovation is a big part of American culture and history.

	Total
Strongly agree	53%
Somewhat agree	39
Somewhat disagree	3
Strongly disagree	2
Don't know	3
Agree (Total)	92%
Disagree (Total)	5

d. Society should focus more on innovating to solve problems.

	Total
Strongly agree	39%
Somewhat agree	46
Somewhat disagree	8
Strongly disagree	1
Don't know	6
Agree (Total)	85%
Disagree (Total)	9

e. Society should approach innovation with more caution to ensure we aren't creating bigger problems than we solve.

	Total
Strongly agree	37%
Somewhat agree	45
Somewhat disagree	12
Strongly disagree	3
Don't know	4
Agree (Total)	82%
Disagree (Total)	14

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f. Innovation is good for progress, but it also risks creating unforeseen problems.

	Total
Strongly agree	39%
Somewhat agree	50
Somewhat disagree	6
Strongly disagree	2
Don't know	3
Agree (Total)	89%
Disagree (Total)	8

g. In total, innovation tends to bring about more harm than good.

	Total
Strongly agree	11%
Somewhat agree	24
Somewhat disagree	37
Strongly disagree	20
Don't know	8
Agree (Total)	35%
Disagree (Total)	57

6. How important have the following been in ensuring the US has maintained a lead in the technology sector compared to the rest of the world?

a. Important summary

	Agree US is a leader in innovation (n = 1,522)
American entrepreneurial spirit	90%
Our education system	87
Our law and regulatory systems	81
Government support and subsidy	77
Immigration policy	65

b. Our education system

	Agree US is a leader in innovation
Very important	55%
Somewhat important	31
Somewhat unimportant	6
Very unimportant	3
Don't know	4
Important (Total)	87%
Unimportant (Total)	9

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c. Our law and regulatory systems

	Agree US is a leader in innovation
Very important	39%
Somewhat important	42
Somewhat unimportant	10
Very unimportant	3
Don't know	6
Important (Total)	81%
Unimportant (Total)	13

d. American entrepreneurial spirit

	Agree US is a leader in innovation
Very important	55%
Somewhat important	35
Somewhat unimportant	4
Very unimportant	1
Don't know	4
Important (Total)	90%
Unimportant (Total)	6

e. Government support and subsidy

	Agree US is a leader in innovation
Very important	34%
Somewhat important	43
Somewhat unimportant	13
Very unimportant	4
Don't know	7
Important (Total)	77%
Unimportant (Total)	17

f. Immigration policy

	Agree US is a leader in innovation
Very important	33%
Somewhat important	33
Somewhat unimportant	17
Very unimportant	9
Don't know	9
Important (Total)	65%
Unimportant (Total)	25

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7. Which of the following do you think most drives innovators to come up with new ideas? Please select one.

	Total
Seeking a solution to an existing problem	35%
To make money	33
The desire to create something new	18
A desire to help people	8
Government regulation that incentivizes new answers	2
Other	*
Don't Know	5

8. Among the following common settings for innovation, which do you believe produces the most innovation? Please select one.

	Total
Individuals or startups in their own private spaces	36%
Corporate research and development in the private sector	25
Innovation designed for the U.S. military	10
University settings	10
Government investment	4
Other	1
Don't Know	13

- 9. Do you expect to see any of the following in your lifetime?
 - a. Yes summary

	Total
Flying drones used to deliver packages ordered from online retailers	81%
The commercial use of self-driving vehicles	71%
Self-operating robots that can act, learn, and adapt without human influence (ex. Delivery drones or house cleaning robots)	63%
Chatbots that can approximate conversations well enough to fool a person into believing they are speaking to another person	63%
Underground tunnels to automatically transport cars through traffic like a subway system	42%
Short-trip flying vehicles (like flying cars) that could be used to run quick errands	33%

b. The commercial use of self-driving vehicles

	Total
Yes	71%
No	18
Don't know	11

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c. Flying drones used to deliver packages ordered from online retailers

	Total
Yes	81%
No	11
Don't know	7

d. Short-trip flying vehicles (like flying cars) that could be used to run quick errands

	Total
Yes	33%
No	51
Don't know	16

e. Underground tunnels to automatically transport cars through traffic like a subway system

	Total
Yes	42%
No	38
Don't know	20

f. Self-operating robots that can act, learn, and adapt without human influence (ex. Delivery drones or house cleaning robots)

	Total
Yes	63%
No	24
Don't know	13

g. Chatbots that can approximate conversations well enough to fool a person into believing they are speaking to another person

	Total
Yes	63%
No	22
Don't know	15

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10. For the following statements, please indicate your level of agreement. This question was split sampled with Q11.

a. Agree summary

	Total
Most drivers occasionally drive distracted.	91%
I worry that self-driving cars will struggle to adapt to unusual road conditions such as weather, pedestrians, bikers, or wild animals.	83%
Self-driving cars will make drivers pay less attention to roads and will make driving more dangerous overall.	74%
Self-driving cars will remove a lot of human error in driving and will make the roads safer.	51%
Self-driving cars will help make teenagers safer, more competent drivers.	36%
I would feel safer if I knew most cars on the road were self-driving.	30%

b. Self-driving cars will make drivers pay less attention to roads and will make driving more dangerous overall.

	Total
Strongly agree	31%
Somewhat agree	42
Somewhat disagree	14
Strongly disagree	6
Don't know	7
Agree (Total)	74%
Disagree (Total)	19

c. Self-driving cars will remove a lot of human error in driving and will make the roads safer.

	0
	Total
Strongly agree	15%
Somewhat agree	36
Somewhat disagree	25
Strongly disagree	15
Don't know	10
Agree (Total)	51%
Disagree (Total)	40

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d. Self-driving cars will help make teenagers safer, more competent drivers.

	Total
Strongly agree	11%
Somewhat agree	25
Somewhat disagree	28
Strongly disagree	26
Don't know	10
Agree (Total)	36%
Disagree (Total)	54

e. I worry that self-driving cars will struggle to adapt to unusual road conditions such as weather, pedestrians, bikers, or wild animals.

	Total
Strongly agree	43%
Somewhat agree	40
Somewhat disagree	9
Strongly disagree	4
Don't know	5
Agree (Total)	83%
Disagree (Total)	12

f. I would feel safer if I knew most cars on the road were self-driving.

Total
12%
18
28
32
9
30%
60

g. Most drivers occasionally drive distracted.

	Total
Strongly agree	55%
Somewhat agree	36
Somewhat disagree	6
Strongly disagree	1
Don't know	2
Agree (Total)	91%
Disagree (Total)	7

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11. For the following statements, please indicate your level of agreement. This question was split sampled with Q10.

a. Agree summary

	Total
I would like self-driving cars to work like cruise control so that I could quickly turn it off and take over if I feel it's necessary.	81%
I occasionally drive distracted.	49%
I would pay less attention to the road and more time relaxing if I had a self-driving car for my commute.	44%
I trust self-driving cars to adapt as well or better than I do to unusual road conditions such as weather, pedestrians, bikers, or wild animals.	36%
Self-driving cars will make me a safer, more competent driver.	34%
I would feel safer if I knew most cars on the road were self-driving.	34%

b. I would pay less attention to the road and more time relaxing if I had a self-driving car for my commute.

	Total
Strongly agree	18%
Somewhat agree	26
Somewhat disagree	22
Strongly disagree	28
Don't know	6
Agree (Total)	44%
Disagree (Total)	50

c. I would like self-driving cars to work like cruise control so that I could quickly turn it off and take over if I feel it's necessary.

	Total
Strongly agree	50%
Somewhat agree	31
Somewhat disagree	6
Strongly disagree	9
Don't know	4
Agree (Total)	81%
Disagree (Total)	15

d. Self-driving cars will make me a safer, more competent driver.

	Total
Strongly agree	11%
Somewhat agree	23
Somewhat disagree	26
Strongly disagree	29
Don't know	11
Agree (Total)	34%
Disagree (Total)	55

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e. I trust self-driving cars to adapt as well or better than I do to unusual road conditions such as weather, pedestrians, bikers, or wild animals.

	Total
Strongly agree	12%
Somewhat agree	24
Somewhat disagree	29
Strongly disagree	28
Don't know	7
Agree (Total)	36%
Disagree (Total)	57

f. I would feel safer if I knew most cars on the road were self-driving.

	Total
Strongly agree	15%
Somewhat agree	20
Somewhat disagree	23
Strongly disagree	33
Don't know	9
Agree (Total)	34%
Disagree (Total)	57

g. I occasionally drive distracted.

	Total
Strongly agree	9%
Somewhat agree	40
Somewhat disagree	26
Strongly disagree	22
Don't know	3
Agree (Total)	49%
Disagree (Total)	48

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12. When considering today's average car and the future of cars, please rank the following types of car improvements with first being the improvement you would like to see manufacturers focus on first.

	Total (N = 2,014)
Safety	1.9
Fuel economy or	2.6
environmental impact	2.0
Speed, handling, and	3.8
performance	3.6
Technology features	3.9
Comfort	3.9
Looks, style, and aesthetics	4.9

13. Which of the following do you think will become popular first: self-driving vehicles or short-trip flying vehicles (like flying cars) for one or two people.

	Total
Self-driving vehicles	77%
Short-trip flying vehicles	8
(like flying cars)	0
Not sure	14

14. Do you currently use a computer, tablet, or smartphone for your job?

	Total
Yes	55%
No	12
I don't currently have a job	33

15. Has working with a computer, tablet, or smartphone made your job easier than not having that technology?

	Currently uses a computer, tablet, or smartphone for job (n = 1,050)
Yes, it's easier with a computer,	74%
tablet, or smartphone	74/6
No, it's not necessarily easier with a	9
computer, tablet, or smartphone	9
My job would not exist without	17
computers, tablets, or smartphones	17

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16. Do you think working with a computer, tablet, or smartphone has made you more productive in your job compared to not having that technology?

	Currently uses a computer, tablet, or smartphone for job
Yes, I'm clearly more productive with a computer, tablet, or smartphone	75%
It's hard to say if I'm more productive with a computer, tablet, or smartphone	21
No, I'm less productive with a computer, tablet, or smartphone	4

17. In the next 10 years, do you expect that improvements in technology will make your job more or less in demand?

	Currently employed (n = 1,309)
More in demand	24%
About the same level of demand	51
Less in demand	16
Don't know	10

18. In the next 10 years, do you expect technology to require you to learn new skills to keep up with changes in your job responsibilities?

	Currently employed
I expect that my future job will require	28%
me to learn completely new skillsets	28%
I expect to learn a few new skills to	51
stay on top of my job	
I don't expect to need any new skills	12
for my future job	
Don't know	8

19. Have you ever used telemedicine (talked to a doctor over the phone or internet to perform a diagnosis of the problem you were having)?

	Total
Yes	21%
No	77
Not sure	2

20. Do you wear eyeglasses or contacts?

	Total
Yes	72%
No	28

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21. Do you believe that the person providing prescriptions for eyeglasses or contacts should need to be licensed?

	Total
Yes, they should be	87%
licensed	6/70
No, they should not	5
need to be licensed	5
Not sure	8

22. Among the following, please select the items that you currently own.

	Total
Computer	86%
Smartphone	84
Gas powered vehicle	73
Tablet	61
Landline phone	40
Smart assistant or smart speaker (such as	
Alexa, siri through a smart speaker, Google	29
home, etc.)	
Wearable technology (such as a smartwatch	29
or fitbit)	29
At least one other smart home device to	
pair with a smart assistant (for example	19
smart lights, smart thermostat, or smart	19
security system)	
Cell phone that is not a smartphone	14
Hybrid vehicle	6
Electric vehicle	2
None of the above	2

23. Which of the following do you most often use as transportation?

	Total
Driving a car that I own or lease	84%
Walking	5
Public transportation	5
Driving a car that I borrow from a friend or rent from a company	3
Taxis and/or ride sharing services	2

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- 24. Please indicate your level of agreement with the following statements.
 - a. Agree summary

	Total
Strong market competition among tech companies helps create more innovative technologies at a faster pace.	87%
There is too much power and wealth controlled by a select few highly innovative tech companies.	77%
The government should use strict technological regulation to prevent unknown innovations from causing unforeseen problems in a mass market.	55%

b. New technology should have little upfront government regulation. Instead, consumers should decide whether they feel safe buying the newest technologies and should be allowed to sue or seek compensation later if they are harmed.

	Total
Strongly agree	15%
Somewhat agree	30
Somewhat disagree	30
Strongly disagree	16
Don't know	10
Agree (Total)	45%
Disagree (Total)	45

c. The government should use strict technological regulation to prevent unknown innovations from causing unforeseen problems in a mass market.

	Total
Strongly agree	18%
Somewhat agree	37
Somewhat disagree	24
Strongly disagree	8
Don't know	13
Agree (Total)	55%
Disagree (Total)	31

d. Strong market competition among tech companies helps create more innovative technologies at a faster pace.

	Total
Strongly agree	38%
Somewhat agree	49
Somewhat disagree	5
Strongly disagree	1
Don't know	7
Agree (Total)	87%
Disagree (Total)	6

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e. There is too much power and wealth controlled by a select few highly innovative tech companies.

	Total
Strongly agree	38%
Somewhat agree	39
Somewhat disagree	12
Strongly disagree	4
Don't know	8
Agree (Total)	77%
Disagree (Total)	15

- 25. Please indicate your level of agreement with the following statements.
 - a. Agree summary

	Total
When I buy a tech product, I am more concerned with what that product does for me than whether it is a popular or new product	91%
I am willing to spend more money for a product that makes my life more convenient	75%
I trust that new, innovative products sold in stores are safe for me to buy	73%
I would trade some of my personal privacy for more convenience in my life	32%
There is no harm in letting companies track your personal information like buying habits or common locations	27%

b. I am willing to spend more money for a product that makes my life more convenient.

	Total
Strongly agree	21%
Somewhat agree	54
Somewhat disagree	15
Strongly disagree	5
Don't know	5
Agree (Total)	75%
Disagree (Total)	20

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c. When I buy a tech product, I am more concerned with what that product does for me than whether it is a popular or new product.

	Total
Strongly agree	55%
Somewhat agree	36
Somewhat disagree	5
Strongly disagree	2
Don't know	2
Agree (Total)	91%
Disagree (Total)	7

d. I would trade some of my personal privacy for more convenience in my life.

	Total
Strongly agree	8%
Somewhat agree	24
Somewhat disagree	32
Strongly disagree	31
Don't know	5
Agree (Total)	32%
Disagree (Total)	63

e. I trust that new, innovative products sold in stores are safe for me to buy.

	Total
Strongly agree	20%
Somewhat agree	53
Somewhat disagree	17
Strongly disagree	4
Don't know	7
Agree (Total)	73%
Disagree (Total)	21

f. There is no harm in letting companies track your personal information like buying habits or common locations.

	Total
Strongly agree	7%
Somewhat agree	21
Somewhat disagree	31
Strongly disagree	38
Don't know	4
Agree (Total)	27%
Disagree (Total)	69

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26. Do you think more government involvement in the ride sharing market would have sped up or slowed down the emergence of companies like Uber or Lyft?

	Total
Slowed down	47%
Sped up	12
Not sure	41

27. Do you think more government involvement will speed up or slow down the emergence of self-driving cars?

	Total
Slow down	52%
Speed up	15
Not sure	32

28. If a drug is deemed to be safe for use in Europe, Canada, or Japan do you think it should be available to Americans?

	Total
Yes	66%
No	13
Not sure	21

29. Which of the following statements do you feel is closest to the way you approach new technologies?

	Total
I try my best to be one of the first to get my hands on new technology	9%
I prefer to wait a little bit before I buy new technologies so the makers can work out the early kinks	36
I usually buy new technology, but only as my old technology becomes obsolete or needs replacing	41
Whenever possible, I prefer to use slightly older technologies that I am comfortable with	11
I avoid technology as much as possible	4

30. How would you describe the area in which you live?

	Total
Urban	23%
Suburban	51
Rural	27

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31. With which political party do you most identify?

	Total
Strong Democrat	15%
Moderate Democrat	12
Lean Democrat	9
Lean Republican	8
Moderate Republican	12
Strong Republican	12
Independent	21
Other	2
Don't know/Refuse	7
Democrat (Total)	37%
Republican (Total)	33

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About the Study

These are findings from an Ipsos poll conducted January 24-28, 2019 on behalf of GET Creative, a division of USA TODAY NETWORK and the Charles Koch Institute. For the survey, a sample of roughly 2,014 adults 18+ from the continental U.S., Alaska and Hawaii were interviewed online in English.

The sample for this study was randomly drawn from Ipsos' online panel (see link below for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link below for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2013 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 2.5 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study has a credibility interval adjusted for design effect of the following (n=2,014, DEFF=1.5, adjusted Confidence Interval=+/- 4 percentage points).

For more information about conducting research intended for public release or Ipsos' online polling methodology, please visit our Public Opinion Polling and Communication page where you can download our brochure, see our public release protocol, or contact us.

For more information on this news release, please contact:

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About Ipsos Public Affairs

Ipsos Public Affairs is a non-partisan, objective, survey-based research practice made up of seasoned professionals. We conduct strategic research initiatives for a diverse number of American and international organizations, based not only on public opinion research, but elite stakeholder, corporate, and media opinion research.

Ipsos has media partnerships with the most prestigious news organizations around the world. Through our media partnerships, Ipsos Public Affairs is a leading source of intelligent information for businesses and professionals in the U.S., Canada, the UK, and internationally. Ipsos Public Affairs is a member of the Ipsos Group, a leading global survey-based market research company. We provide boutique-style customer service and work closely with our clients, while also undertaking global research.

About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 88 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build longterm relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,780.5 million in 2017.

GAME CHANGERS

« Game Changers » is the Ipsos signature.

At Ipsos we are passionately curious about people, markets, brands and society. We make our changing world easier and faster to navigate and inspire clients to make smarter decisions. We deliver with security, speed, simplicity and substance. We are Game Changers.

> Ipsos is listed on Eurolist – NYSE-Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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