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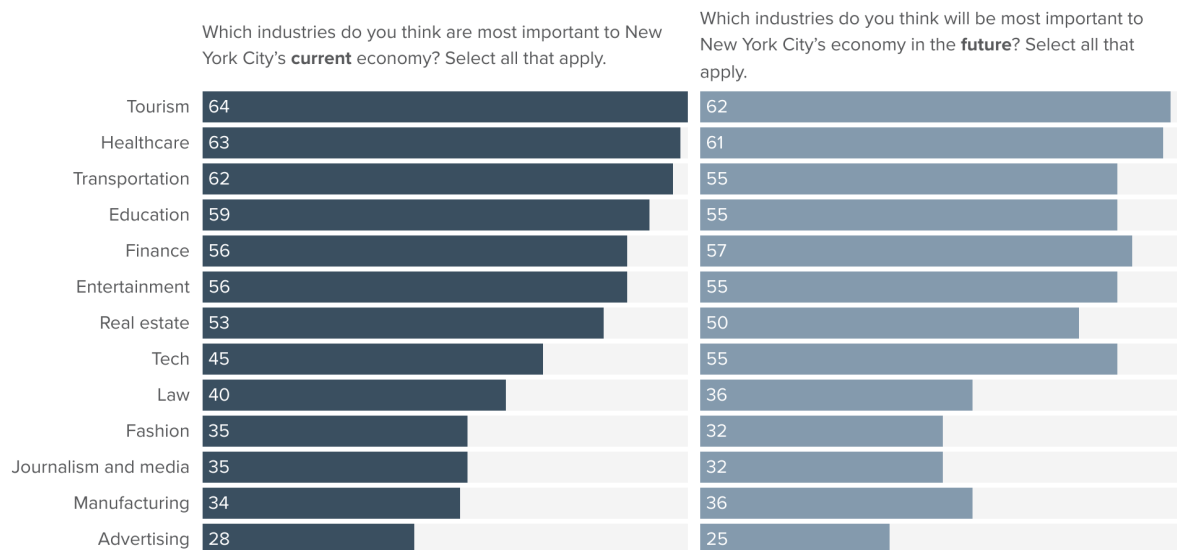
Jun 2, 2022

Key Findings

On behalf of Tech:NYC, Embold Research surveyed 1,050 registered voters in New York City from April 29 - May 6, 2022. This study is part of a series of polls, designed to understand voters' opinions on quality of life, work, and the tech environment in NYC.

Fostering New York City's Tech Industry

Tech is recognized as important to New York City's economy now, and even more so in the future. It is the only industry that voters expect to increase in importance. More voters report that the tech industry will be important in the future (55%) compared to those who reported that tech is important today (45%). This places tech alongside other critical local industries, including finance, transportation, education, and entertainment.



N = 1,050

Source: Embold Research, May 2022 Survey of New York Voters

In line with their valuation of the industry, New Yorkers show a strong appetite for attracting more tech to the area. Six in ten New Yorkers believe the City should work to attract more tech companies (61%), and that tech companies, along with the jobs

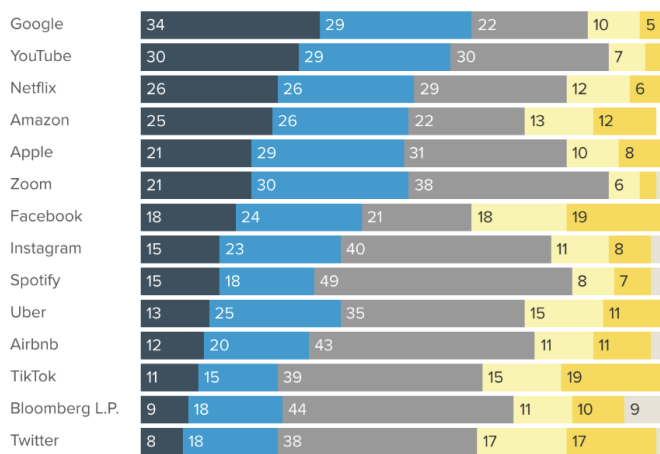
and innovation they create, are needed now more than ever with the coronavirus pandemic (60%).

Voters tend to be in favor of government support for the tech industry. This includes providing training programs to help people get jobs in tech (71% support), increasing and strengthening computer science and STEM curricula for K-12 students (68%), and increasing access to public Wi-Fi (64%).

Although many voters show a strong desire for incentives to bolster New York City’s tech industry, they also see a need for specific government regulations. Most voters are in favor of regulations that protect privacy and personal data (85%), ensure that data isn’t misused (78%), and prevent misinformation (69%).

How favorable are your feelings about each of the following organizations and products?

● Very favorable ● Somewhat favorable ● Neutral ● Somewhat unfavorable ● Very unfavorable ● Never heard of them



N = 1,050

Source: Embold Research, May 2022 Survey of New York Voters

Support for regulations designed to protect privacy and personal data and prevent misinformation is likely reflective of how New Yorkers view specific tech companies.

New Yorkers have the most positive opinions of Google and Youtube. This is followed closely by Netflix, Amazon, Apple, and Zoom although Netflix has experienced a substantial decline (-12) since December. Facebook, and to a lesser extent TikTok and Twitter continue to be divisive. However, despite also being a

social media behemoth, Instagram faces less strongly negative opinions.

New Yorkers’ Changing Work Lives

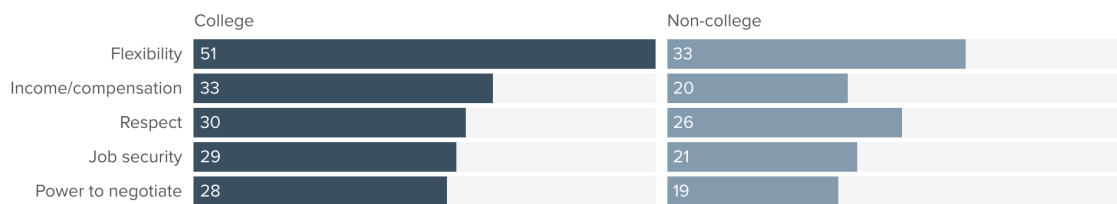
Consistent with poll findings from December, this study revealed that New Yorkers’ work lives have been greatly impacted by the pandemic. Currently, 54% of working New York voters say they work remotely at least some of the time (46% 0 days, 11% 1-2 days, 10% 3 days, 33% 4 or 5 days), most of whom do so because of their own choice (73%) as opposed to it being the only option (27%). However, there is an even greater appetite for remote work than what workers are currently experiencing. Just 22% of working NY voters say they would never like to work remotely. In their ideal world,

19% would work remotely 1-2 days per week, 14% 3 days per week, and 44% would work remotely 4 or 5 days per week.

While much has been written about the changing relationship between workers and their employers, it is clear that this change has been most profound for college graduates. Compared to before the pandemic, half (51%) of college-educated New Yorkers say they have more flexibility, compared to 1 in 3 non-college-educated New York voters. College-educated workers are also much more likely to have received more income/compensation, respect, job security, and power to negotiate, although a plurality of each group says they have experienced “no difference” on each of these fronts (with the exception of flexibility for college-educated workers).

Thinking about your relationship with your employer, do you feel like you have more or less of each of the following compared to before the pandemic?

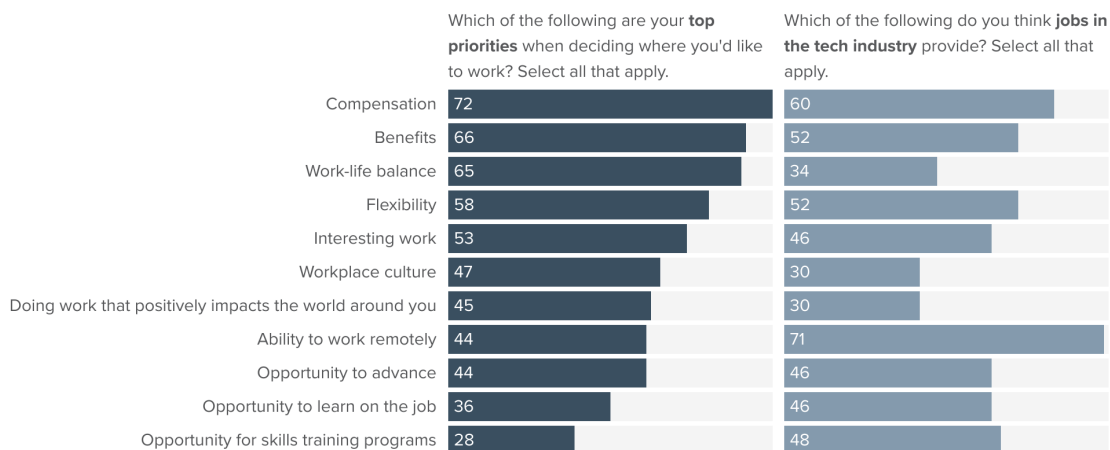
Total percent of “Much more” and “Somewhat more” responses



N = 1,050

Source: Embold Research, May 2022 Survey of New York Voters

For those entering or currently in the workforce, top priorities when deciding where to work include compensation (72%), benefits (66%), work-life balance (65%), and flexibility (58%). With the exception of work-life balance, the tech industry is viewed as performing well on all of these top priorities. It is also broadly viewed as providing an ability to work remotely.



N = 1,050

Source: Embold Research, May 2022 Survey of New York Voters



METHODOLOGY

The survey was commissioned by Tech:NYC and conducted online by Embold Research. Embold Research surveyed 1,050 registered voters in New York from April 29- May 6, 2022. We used the following sources to recruit respondents:

- targeted advertisements on Facebook and Instagram.
- Text messages sent, via the Switchboard platform, to cell phone numbers listed on the voter file for individuals who qualified for the survey's sample universe, based on their voter file data.

From either source, respondents were directed to the survey which was hosted on SurveyMonkey's website. Ads placed on social media targeted any registered voters living in New York, NY. As the survey fielded, Embold Research used dynamic online sampling: adjusting ad budgets, lowering budgets for ads targeting groups that were overrepresented, and raising budgets for ads targeting groups that were underrepresented, so that the final sample was roughly representative of the population across different groups. The survey was conducted in English.

Weighting parameters were estimated based on the age, gender, education, 2020 presidential vote, and regional distribution of electorates in New York, obtained from the voter file. That is, if a given age bracket or gender group represented 20% of the electorate, then that same group would be roughly weighted to 20% in this survey. The modeled margin of error* for this survey is 3.5%.

* We adopt The Pew Research Center's convention for the term "modeled margin of error"⁽¹⁾ (mMOE) to indicate that our surveys are not simple random samples in the pure sense, similar to any survey that has either non-response bias or for which the general population was not invited at random. A common, if imperfect, convention for reporting survey results is to use a single, survey-level mMOE based on a normal approximation. This is a poor approximation for proportion estimates close to 0 or 1. However, it is a useful communication tool in many settings and is reasonable in places where the proportion of interest is close to 50%. We report this normal approximation for our surveys assuming a proportion estimate of 50%.

(1)

<https://www.pewresearch.org/methods/2018/01/26/for-weighting-online-opt-in-samples-what-matters-most/> (2) Kish, Leslie. Survey Sampling, 1965.

For more information, contact Kyla Ronellenfitsch at kyla@emboldresearch.com.

REPORTED QUESTIONS

1. Are you:

- Male
- Female
- Other

2. In what year were you born? [TEXT BOX]

3. In what ZIP code do you currently live? [TEXT BOX]

4a. What is your race? [RANDOMIZE]

- White / Caucasian
- Hispanic or Latino/a
- Black or African American
- Asian / Pacific Islander
- American Indian or Alaska Native
- Other (please specify): [text box]

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4b. [**if not Hispanic or Latino/a**] Are you from a Hispanic, Latino/a or Spanish-speaking background?

- Yes
- No

5. Which borough do you live in?

- The Bronx
- Brooklyn
- Manhattan
- Queens
- Staten Island
- None of the above [TERMINATE]

6. Which of the following best describes you?

- Employed full time
- Employed part time
- Student
- Retired
- Homemaker
- Unemployed
- Prefer not to say

7. What is the highest level of education you have completed?

- High school diploma or less
- Some college, but no degree
- Associate's degree, or two-year college degree
- Bachelor's degree, or four-year college degree
- Graduate degree

Registration, Party ID, Past Vote

8a. Are you registered to vote in New York?

- Yes
- No [TERMINATE]
- Not sure [TERMINATE]

9a. Generally speaking, do you think of yourself as a: [RANDOMIZE]

- Democrat
- Republican
- Independent/Other

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9b. [IF DEMOCRAT/ REPUBLICAN] Do you consider yourself a:

- Strong [Democrat/Republican]
- Not so strong [Democrat/Republican]

9c. [IF INDEPENDENT/ NO PARTY AFFILIATION] Do you consider yourself closer to:

- The Democrats
- The Republicans
- Neither

10. How did you vote in the 2020 election for President or for some reason were you unable to vote?

- Joe Biden, the Democrat
- Donald Trump, the Republican
- Jo Jorgensen, the Libertarian
- Not registered/Too young/Ineligible
- Did not vote

Benchmark Favorability

11. How favorable are your feelings about each of the following organizations and products? [RANDOMIZE] [Very favorable | Somewhat favorable | Neutral | Somewhat unfavorable | Very unfavorable | Never heard of them]

- Apple
- Facebook
- Google
- Amazon
- Zoom
- Netflix
- Uber
- Bloomberg L.P.
- Airbnb
- Instagram
- TikTok
- Twitter
- Spotify
- YouTube

New York Mood and the Economy

12. Which industries do you think are most important to New York City's **current** economy? Select all that apply. [RANDOMIZE]

- Finance

- Fashion
- Real estate
- Healthcare
- Journalism and media
- Transportation
- Advertising
- Law
- Education
- Tech
- Tourism
- Entertainment
- Manufacturing

13. Which industries do you think will be most important to New York City's economy in the **future**? Select all that apply. [RANDOMIZE]

- Finance
- Fashion
- Real estate
- Healthcare
- Journalism and media
- Transportation
- Advertising
- Law
- Education
- Tech
- Tourism
- Entertainment
- Manufacturing

14a. [if employed] How many days per week do you currently work remotely?

- 0
- 1
- 2
- 3
- 4

- 5

14b. [if employed] How many days per week would you work remotely if you could choose?

- 0
- 1
- 2
- 3
- 4
- 5

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15a. [if currently work remotely at least some of the time] Do you work remotely:

- By choice
- Because there's no other option

15b. [if currently work in person at least some of the time] Do you work in-person:

- By choice
- Because there's no other option

16. [if employed] Thinking about your relationship with your employer, do you feel like you have more or less of each of the following compared to before the pandemic?

[Much more | Somewhat more | The same | Somewhat less | Much less]

[RANDOMIZE]

- Power to negotiate
- Income/compensation
- Job security
- Respect
- Flexibility

17. [if employed, student, unemployed] Which of the following are your top priorities when deciding where you'd like to work? Select all that apply. [RANDOMIZE]

- Ability to work remotely
- Flexibility

- Work-life balance
- Compensation
- Benefits
- Workplace culture
- Doing work that positively impacts the world around you
- Opportunity to advance
- Opportunity to learn on the job
- Opportunity for skills training programs
- Interesting work

18. Which of the following do you think jobs in the tech industry provide? Select all that apply. [RANDOMIZE]

- Ability to work remotely
- Flexibility
- Work-life balance
- Good compensation
- Good benefits
- Good workplace culture
- Doing work that positively impacts the world around you
- Opportunity to advance
- Opportunity to learn on the job
- Opportunity for skills training programs
- Interesting work

New York and Tech

19. Do you agree or disagree with the following statements? [Strongly agree | Somewhat agree | Neutral | Somewhat disagree | Strongly disagree] [RANDOMIZE]

- New York City should work to attract more tech companies.
- Government regulations of the tech industry usually do more harm than good.
- Tech companies and the jobs and innovation that they create are needed in New York City now more than ever with the coronavirus pandemic.

20. Which of the following types of government regulations on the tech industry do you support? Select all that apply. [RANDOMIZE]

- Protecting privacy and personal data
- Making sure data isn't misused
- Preventing misinformation
- Reducing political bias on social media
- Breaking up tech companies into smaller companies
- Keeping tech companies from growing too big
- None of the above

21. Which of the following types of government support for the tech industry do you support? Select all that apply. [RANDOMIZE]

- Provide training programs for individuals so they can get jobs in the tech industry
- Increase and strengthen computer science and STEM curriculum for K-12 students
- Further incorporate technology to streamline and provide access to government services
- Increase access to public WiFi
- Facilitate mentorship and internship programs in technology related professions
- Further incorporate technology and computer access into the library system
- None of the above

22. Which of the following best describes you? Please select all that apply: [RANDOMIZE]

- A family member has worked in the tech industry in New York City.
- A close friend has worked in the tech industry in New York City.
- I have worked in the tech industry in New York City.
- None of the above

23. For statistical purposes, what is your household income?

- Less than \$20,000
- \$20,000 to \$34,999
- \$35,000 to \$49,999

- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$249,999
- \$250,000 or more
- Prefer not to say