

Tech Perceptions Survey

America Weighs in on the Current
State of Tech

September 2015

The logo for MODIS, featuring the word "MODIS" in a light blue, rounded, sans-serif font. A dashed white line connects the top-left box to the logo, starting vertically, then horizontally, and finally diagonally down to the top of the "MODIS" text.

MODIS

SURVEY BACKGROUND

Background

- Modis fielded a survey regarding behaviors, perceptions and attitudes tied to technology, job satisfaction and other employment-focused themes.

Methodology

- This survey was conducted by Allison+Partners on behalf of Modis, among a nationally representative sample of 1,010 individuals in the United States over the age of 18, with panel services from Qualtrics.



KEY FINDINGS

THE U.S. IS A GLOBAL LEADER IN TECHNOLOGY:

- 60.9% of respondents agree with the statement 'The U.S. is a global leader in the technology industry today.' Respondents in the age group of 26 – 34 were most likely to agree with that statement (72%).
- Of respondents who agreed that the U.S. is a global technology leader, 79.1% felt that leadership will continue for the next five years. Additionally, 94% felt that technology education was important in maintaining the United States' leadership in the technology industry.
- Among respondents who disagreed that the U.S. is a global technology leader, a lack of quality education was the reason most cited as contributing to the United States not being a global leader in the technology industry (56.5%), followed by a lack of government support of tech growth (39.3%) and a lack of financial investment in tech innovation (38.7%).

KEY FINDINGS

RELOCATION:

- Younger individuals are more willing to relocate; those ages 18 – 25 were most likely to indicate they would relocate, followed by those ages 26 – 34, then by those ages 35 – 54.
- Of those respondents who were willing to relocate, the largest group (35.0%) indicated they would expect a salary increase of between 20 – 29% after relocating. The second largest group of these respondents (27.6%), expected a 40% or greater increase in salary after relocating. 23.2% expected a 30 – 39% increase, 13.1% expected a 10 – 19% increase, and just 1.1% expected a 0 – 9% increase.
- Of those respondents who were willing to relocate, 51.5% were most willing to relocate to the Northwest. 29.5% would not be willing to relocate to the Northeast.

KEY FINDINGS

TECH GROWTH:

- 84.8% of respondents agreed or strongly agreed that demand for IT workers would increase in the next 5 years.
- Healthcare was, by far, the industry most respondents felt would have the greatest need for tech talent in the next five years, selected by 46% of respondents.

UPCOMING ELECTION:

- Regarding the 2016 presidential elections, 41.2% of respondents were not confident that establishing the U.S. as a leader in technology is a priority to the candidates.
- 42.1% were somewhat confident that it was a priority, and 16.7% were very confident.
- Older respondents (ages 55 – 64 and 65+) were more likely to not be confident, whereas younger respondents (ages 18 – 25 and 26 – 34) were more likely to express confidence.

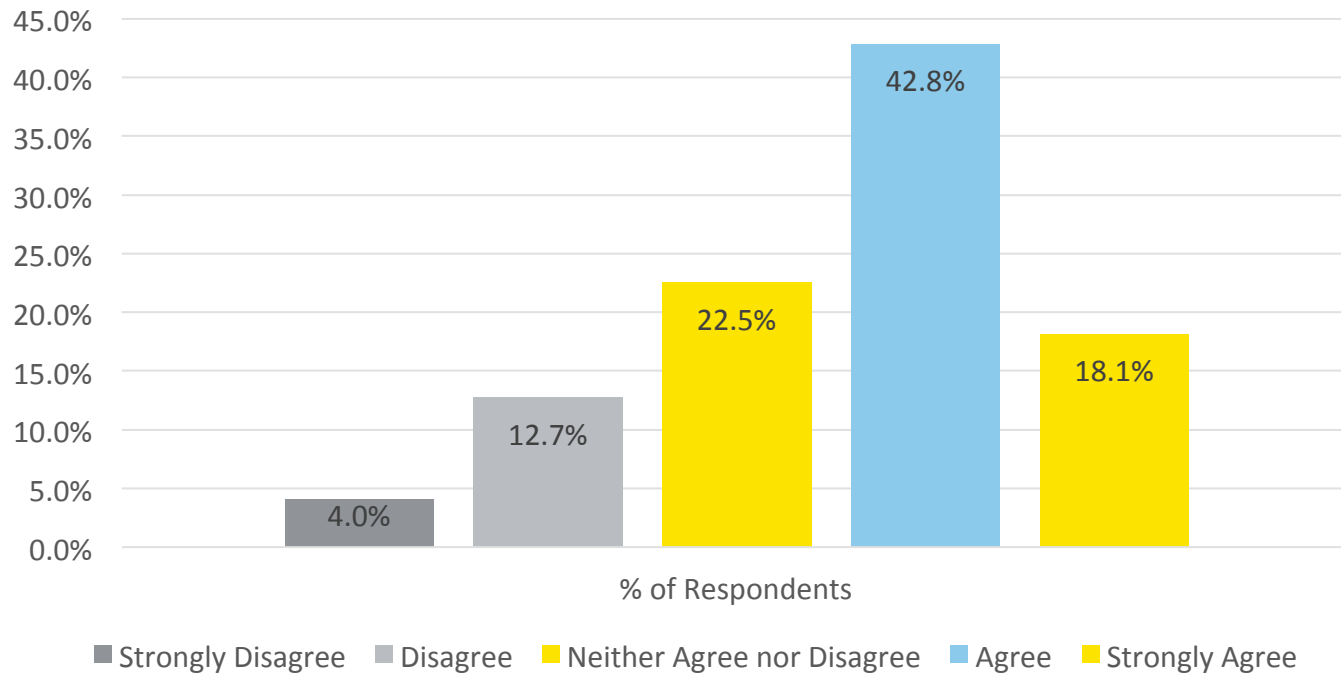
**TECH PERCEPTIONS SURVEY:
US TECH LEADERSHIP**



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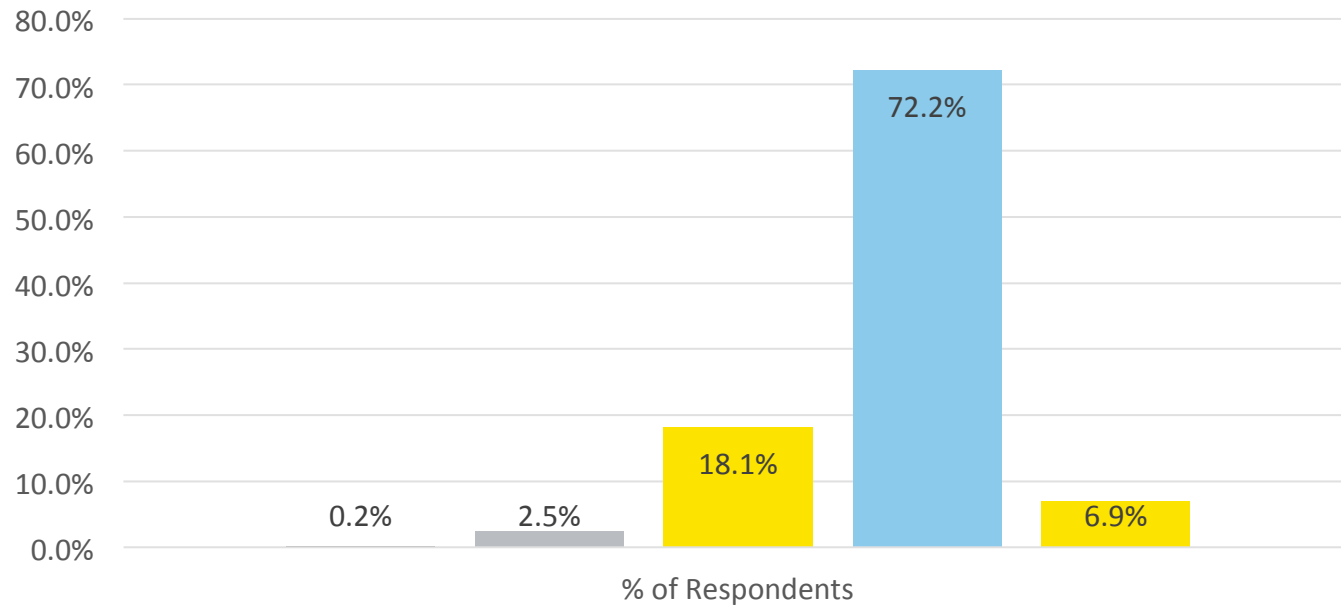
U.S. TECH LEADERSHIP

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: THE U.S. IS A GLOBAL LEADER IN THE TECHNOLOGY INDUSTRY TODAY.



U.S. TECH LEADERSHIP

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: I BELIEVE THAT THE U.S. WILL CONTINUE TO BE A GLOBAL LEADER IN THE TECHNOLOGY INDUSTRY IN THE NEXT 5 YEARS.

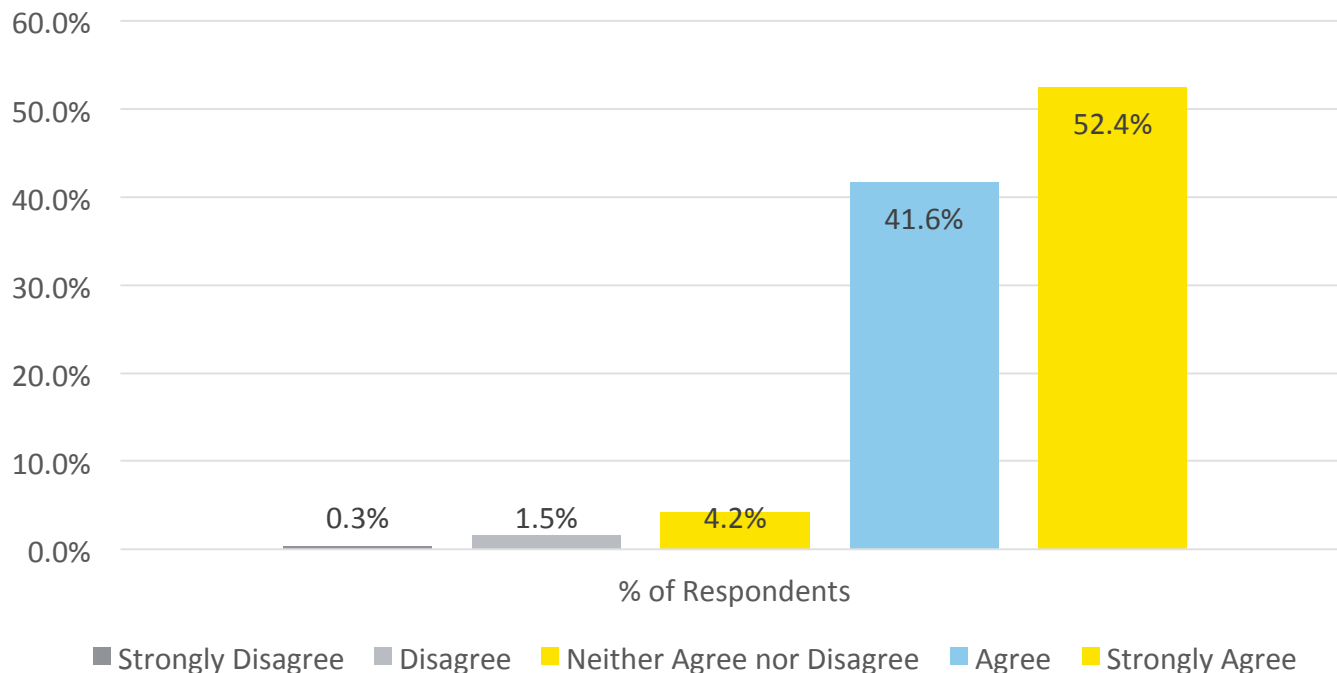


■ Strongly Disagree ■ Disagree ■ Neither Agree nor Disagree ■ Agree ■ Strongly Agree

*Among respondents who agreed that the U.S. is a global tech leader in Q2.1.

U.S. TECH LEADERSHIP

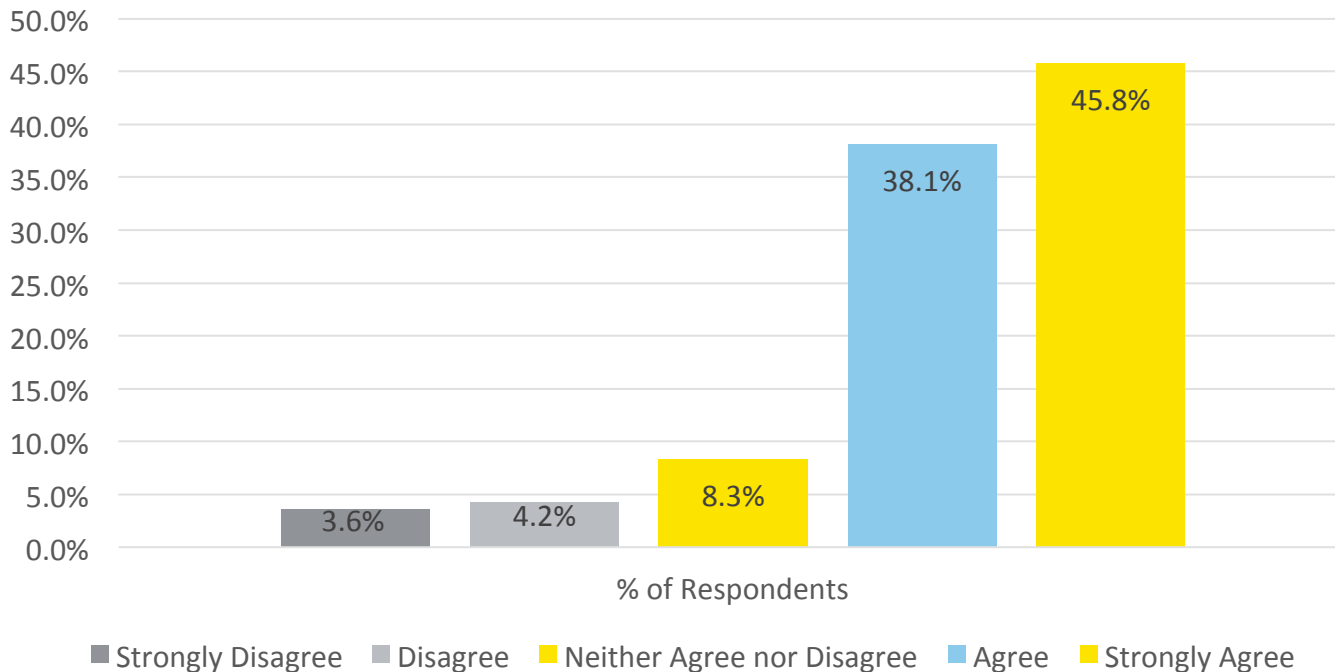
DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: I BELIEVE TECHNOLOGY EDUCATION IN THE U.S. IS IMPORTANT TO MAINTAINING THE COUNTRY'S STATUS AS A GLOBAL LEADER IN THE INDUSTRY.



*Among respondents who agreed that the U.S. is a global tech leader in Q2.1.

U.S. TECH LEADERSHIP

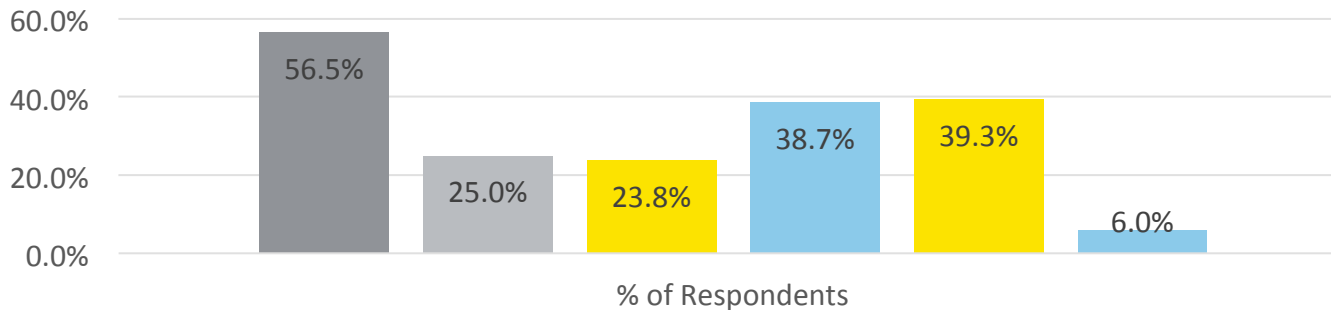
DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: I BELIEVE THERE IS A NEED FOR INCREASED TECHNOLOGY EDUCATION POLICY IN THE U.S.



*Among respondents who disagreed that the U.S. is a global tech leader in Q2.1.

U.S. TECH LEADERSHIP

WHAT FACTORS DO YOU BELIEVE MOST CONTRIBUTE TO THE U.S. NOT BEING A GLOBAL LEADER IN THE TECHNOLOGY INDUSTRY TODAY? SELECT ALL THAT APPLY.



- Lack of quality education in the U.S.
- Lack of diversity in the U.S. tech workforce
- Lack of talent in U.S. workforce
- Lack of financial investment in U.S. tech innovation
- Lack of government support of U.S. Tech Growth
- Other

*Among respondents who disagreed that the U.S. is a global tech leader in Q2.1.

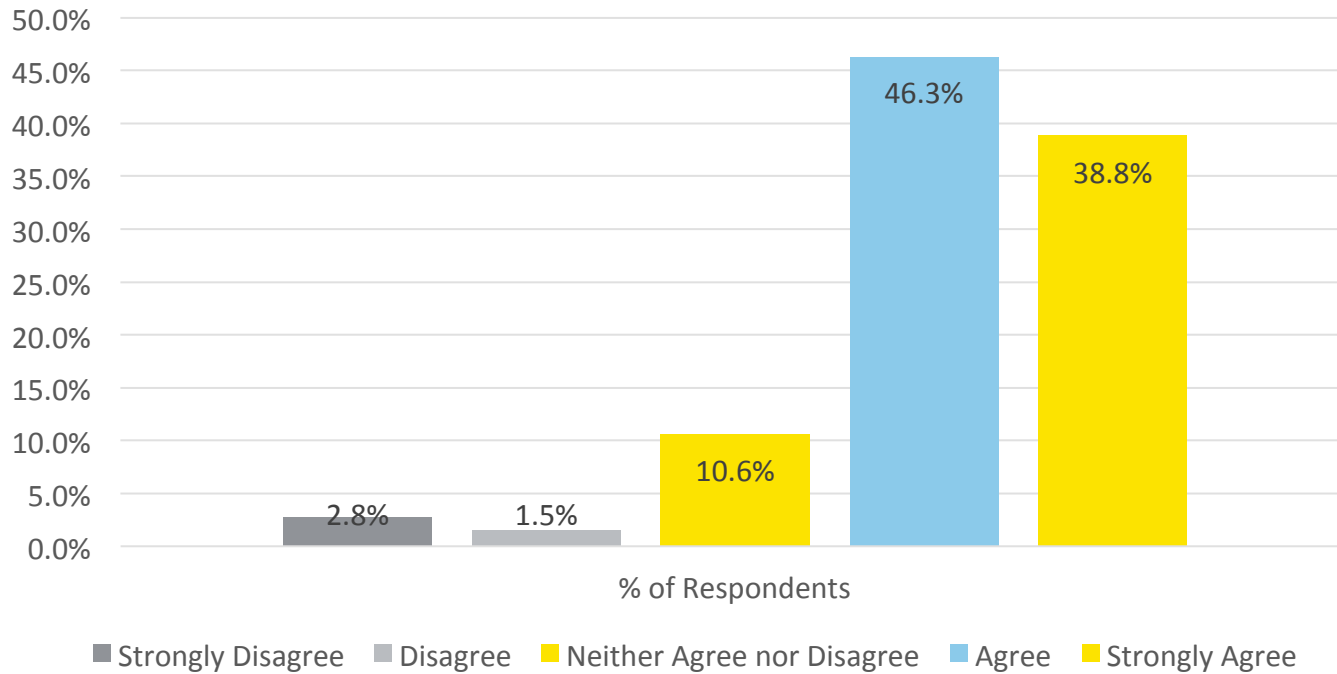
**TECH PERCEPTIONS SURVEY:
TECH JOBS**



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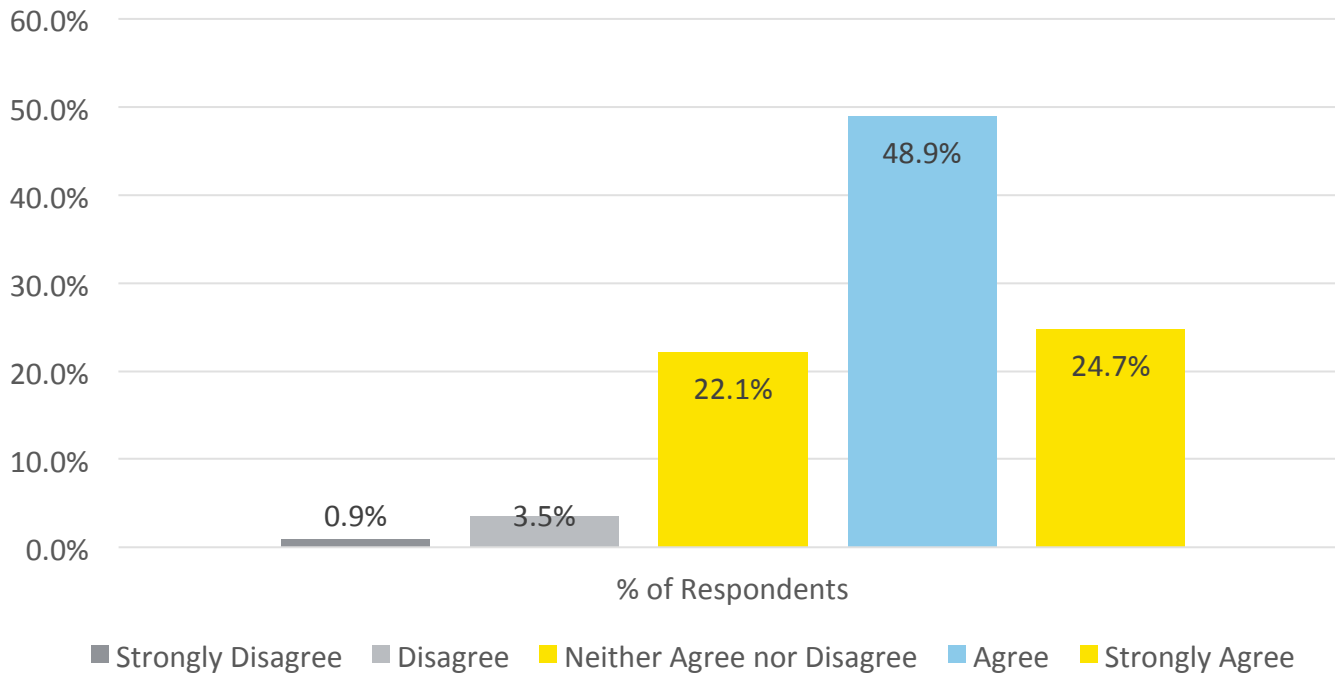
TECH JOBS

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: THE DEMAND FOR TECH PROFESSIONALS IN THE U.S. WILL GROW OVER THE NEXT FIVE YEARS.



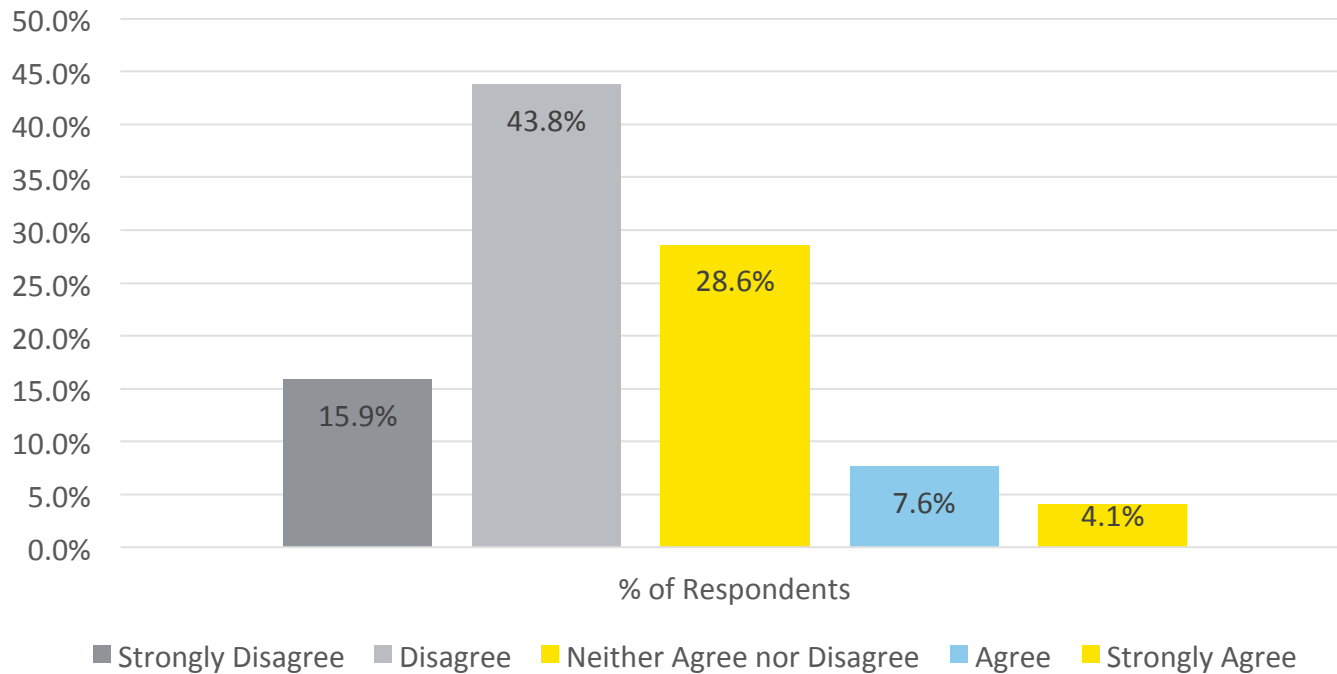
TECH JOBS

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: TECH JOBS IN THE U.S. ARE LUCRATIVE COMPARED TO JOBS IN OTHER FIELDS.



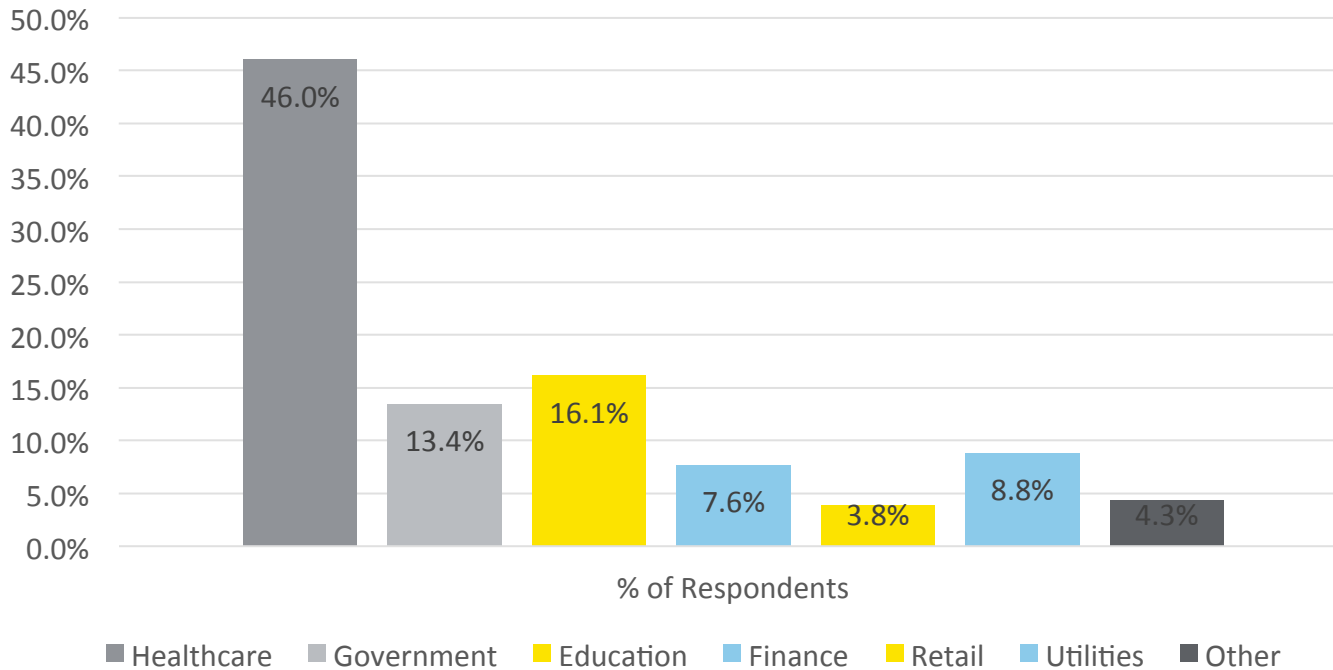
TECH JOBS

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: SILICON VALLEY IS THE ONLY PLACE IN THE U.S. WITH LUCRATIVE JOBS IN TECHNOLOGY.



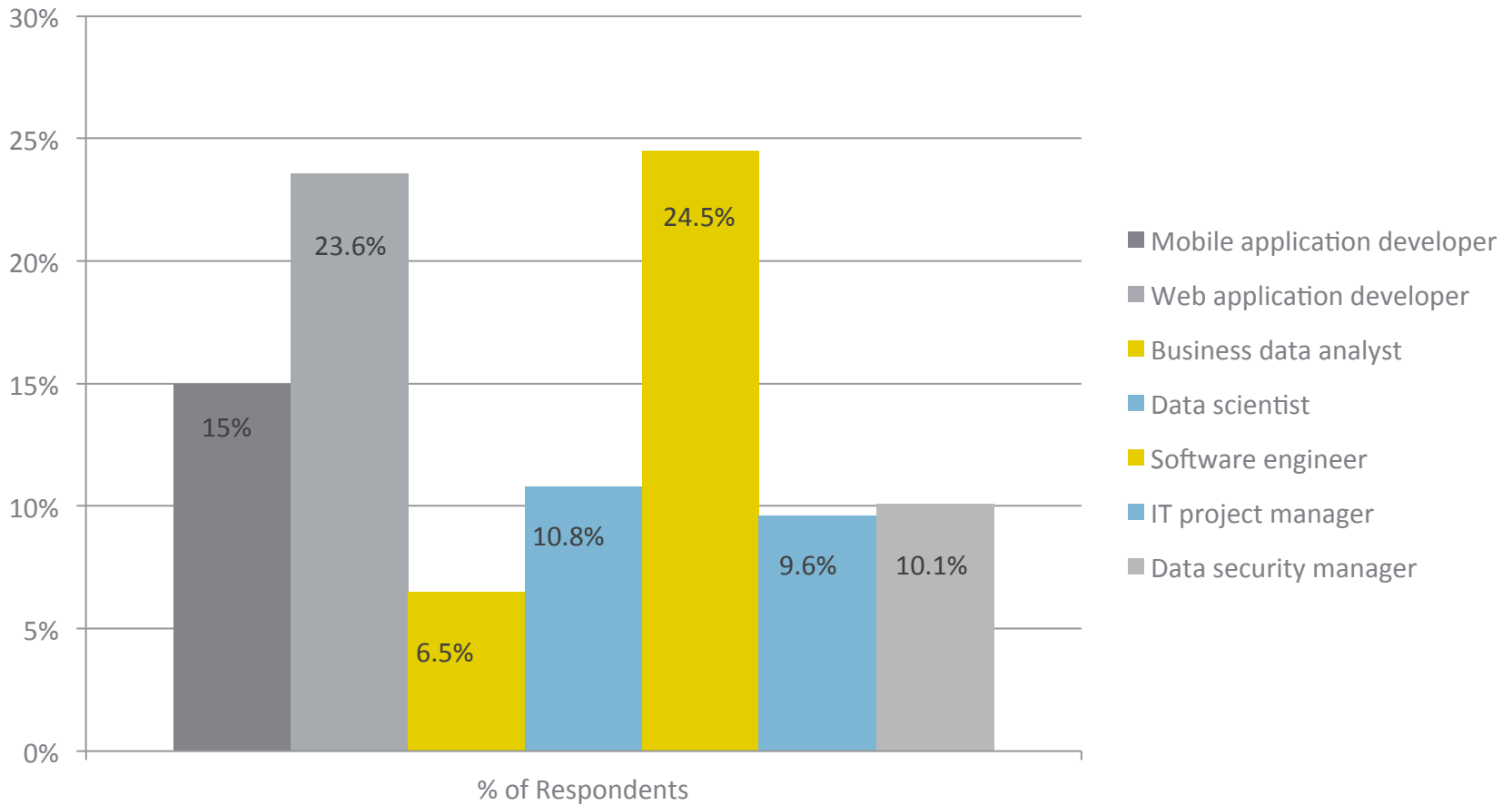
TECH JOBS

WHICH INDUSTRY DO YOU THINK WILL HAVE THE GREATEST NEED FOR INCREASED TECHNOLOGY TALENT IN THE NEXT FIVE YEARS?



TECH JOBS

WHICH OF THE FOLLOWING DO YOU THINK IS THE COOLEST TECH JOB?



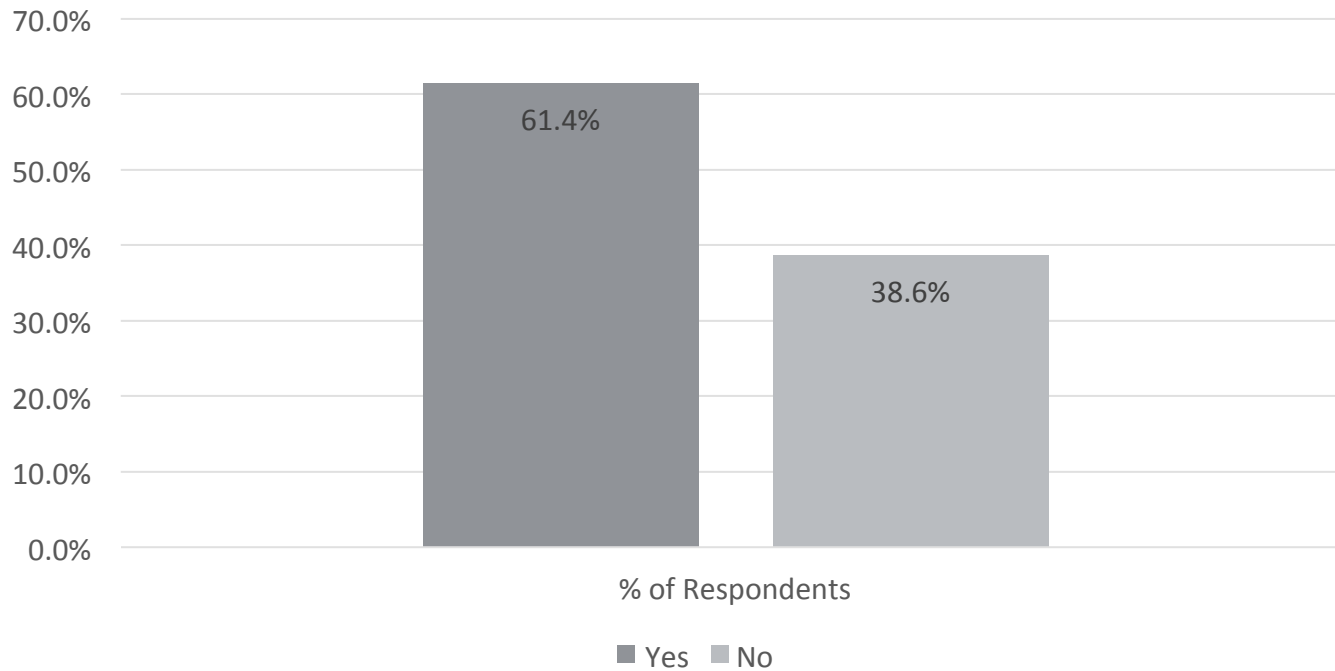
**TECH PERCEPTIONS SURVEY:
RELOCATION**



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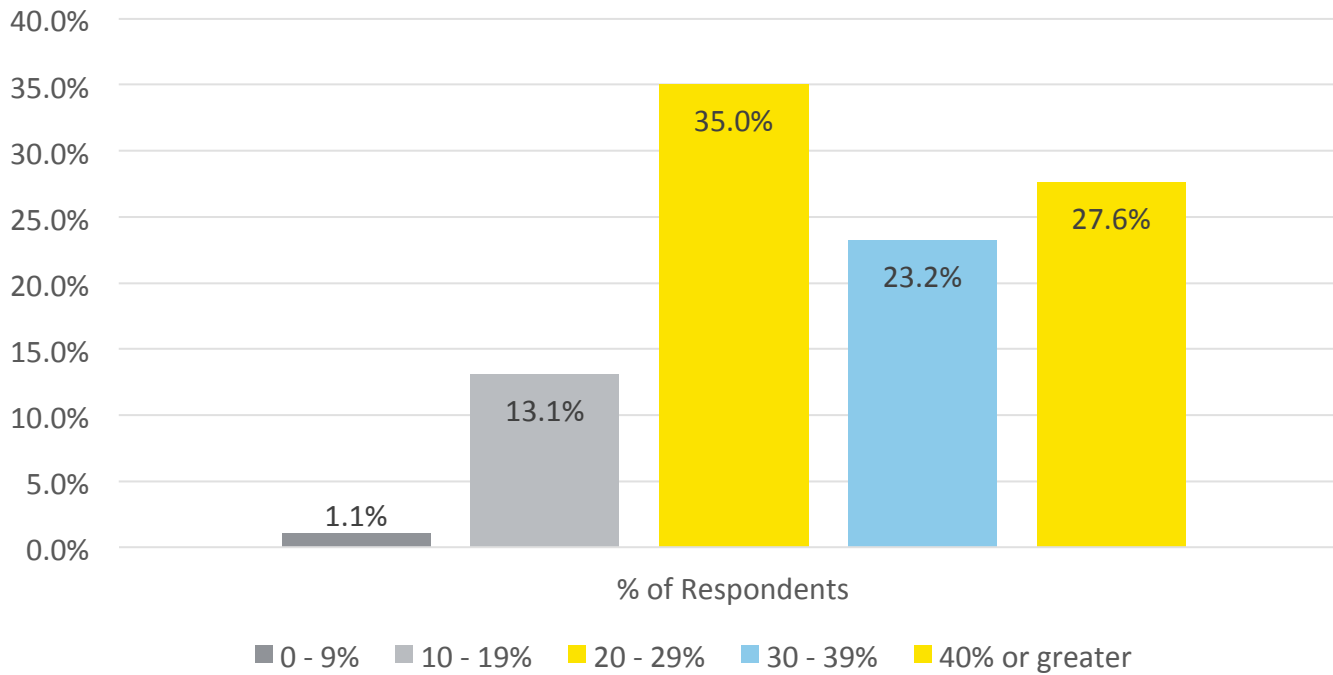
RELOCATION

WOULD YOU BE WILLING TO RELOCATE WITHIN THE U.S. FOR A POSITION WITH A HIGHER SALARY?



RELOCATION

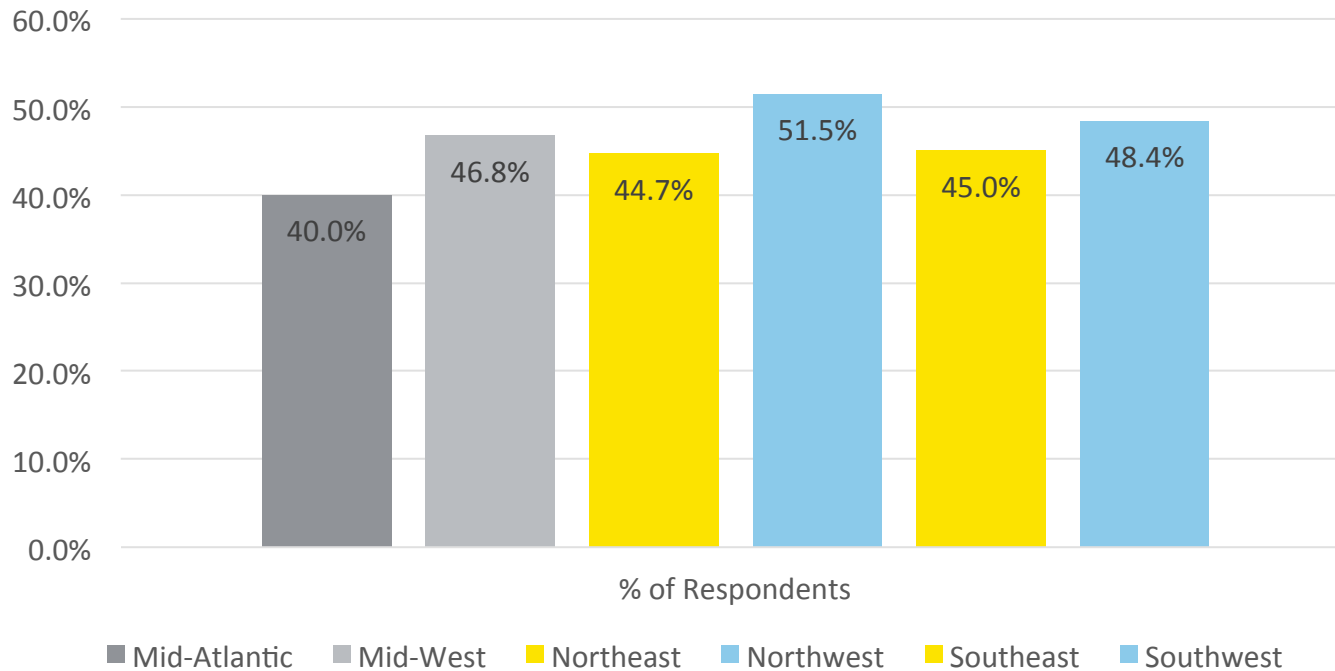
WHAT SALARY INCREASE WOULD YOU EXPECT AFTER AGREEING TO RELOCATE?



*Among respondents who said yes to Q4.1

RELOCATION

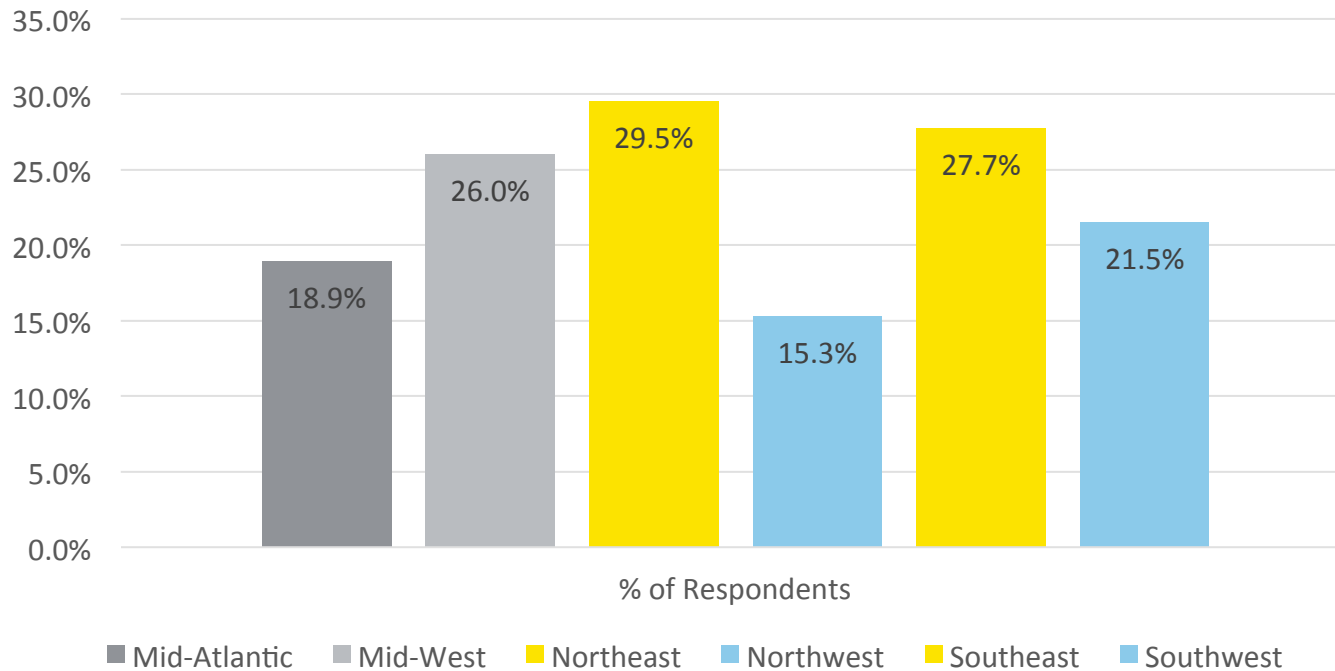
WHAT U.S. REGION WOULD YOU BE WILLING TO RELOCATE TO? CHOOSE ALL THAT APPLY.



*Among respondents who said yes to Q4.1

RELOCATION

WHAT U.S. REGION WOULD YOU NOT BE WILLING TO RELOCATE TO, EVEN WITH A SUBSTANTIAL SALARY INCREASE? SELECT ALL THAT APPLY.



*Among respondents who said yes to Q4.1

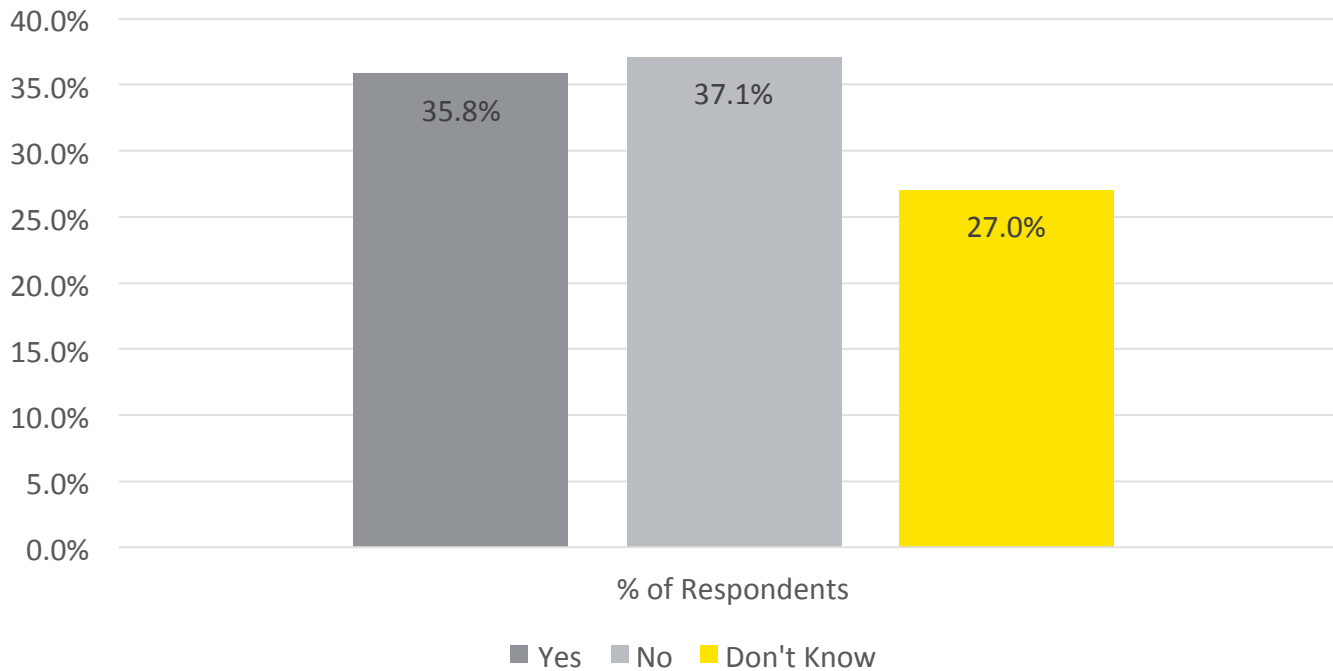
**TECH PERCEPTIONS SURVEY:
COMPENSATION & BENEFITS**



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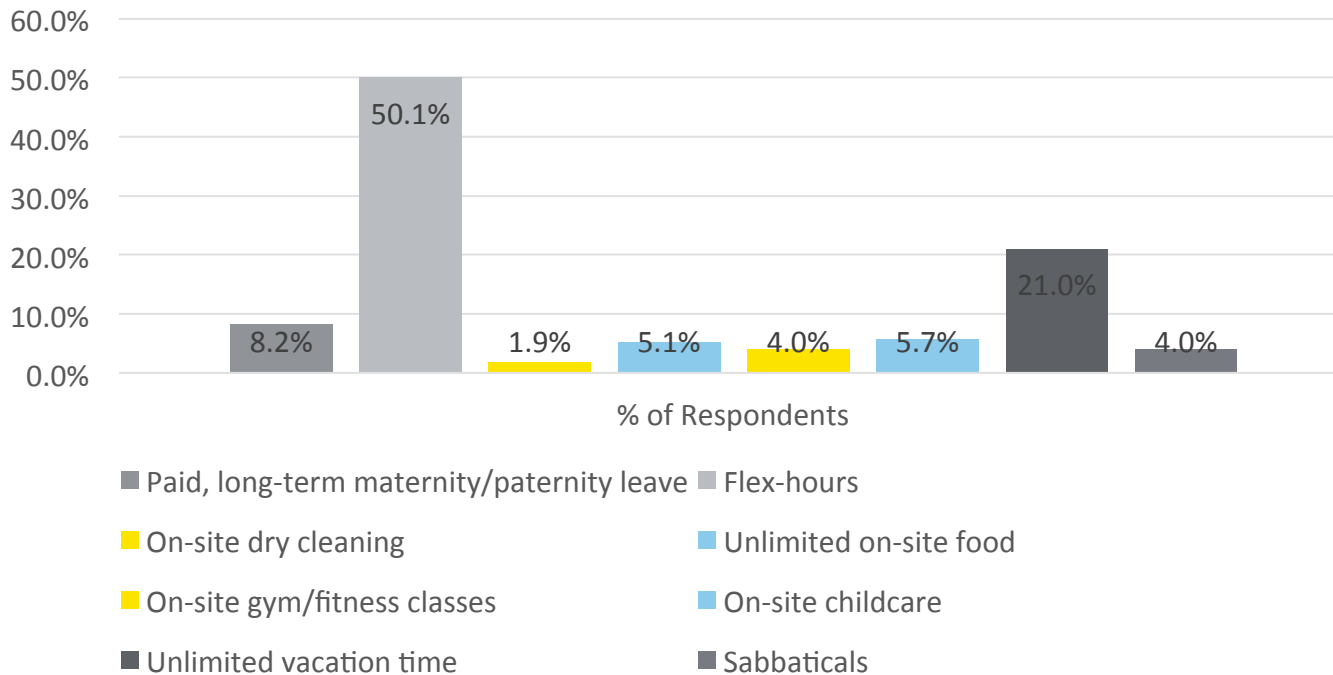
COMPENSATION

DO YOU FEEL THAT YOUR EMPLOYER PAYS YOU APPROPRIATELY FOR YOUR LEVEL OF EXPERIENCE?



BENEFITS

WHAT BENEFIT WOULD APPEAL MOST TO YOU IN A JOB?



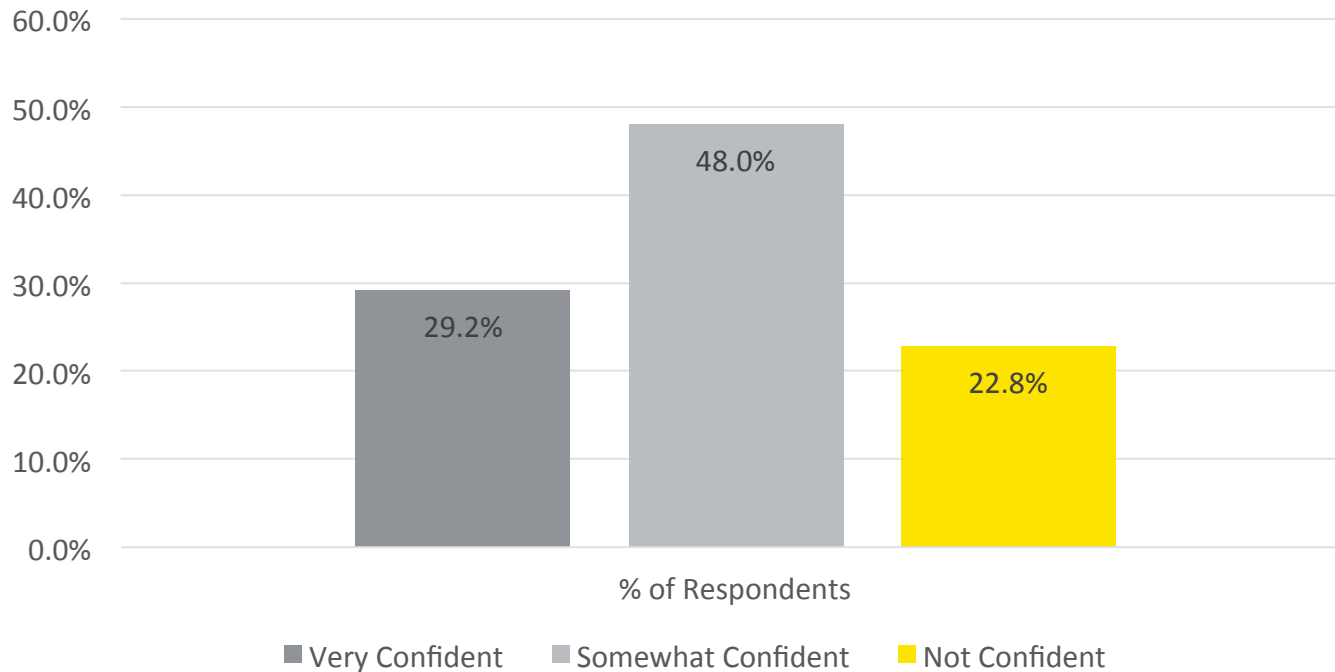
**TECH PERCEPTIONS SURVEY:
OTHER KEY FINDINGS**



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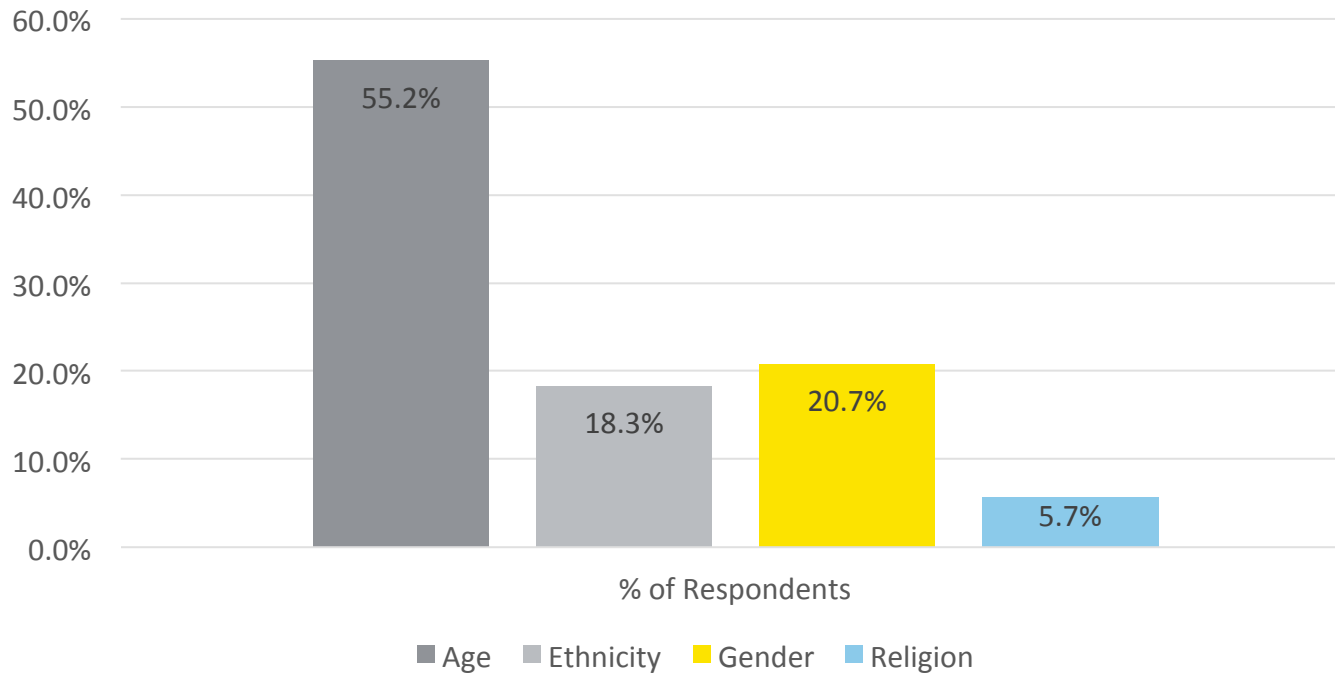
PRIVACY

HOW CONFIDENT DO YOU FEEL IN YOUR EMPLOYER'S ABILITY TO SECURE YOUR PERSONAL INFORMATION AND KEEP IT CONFIDENTIAL?



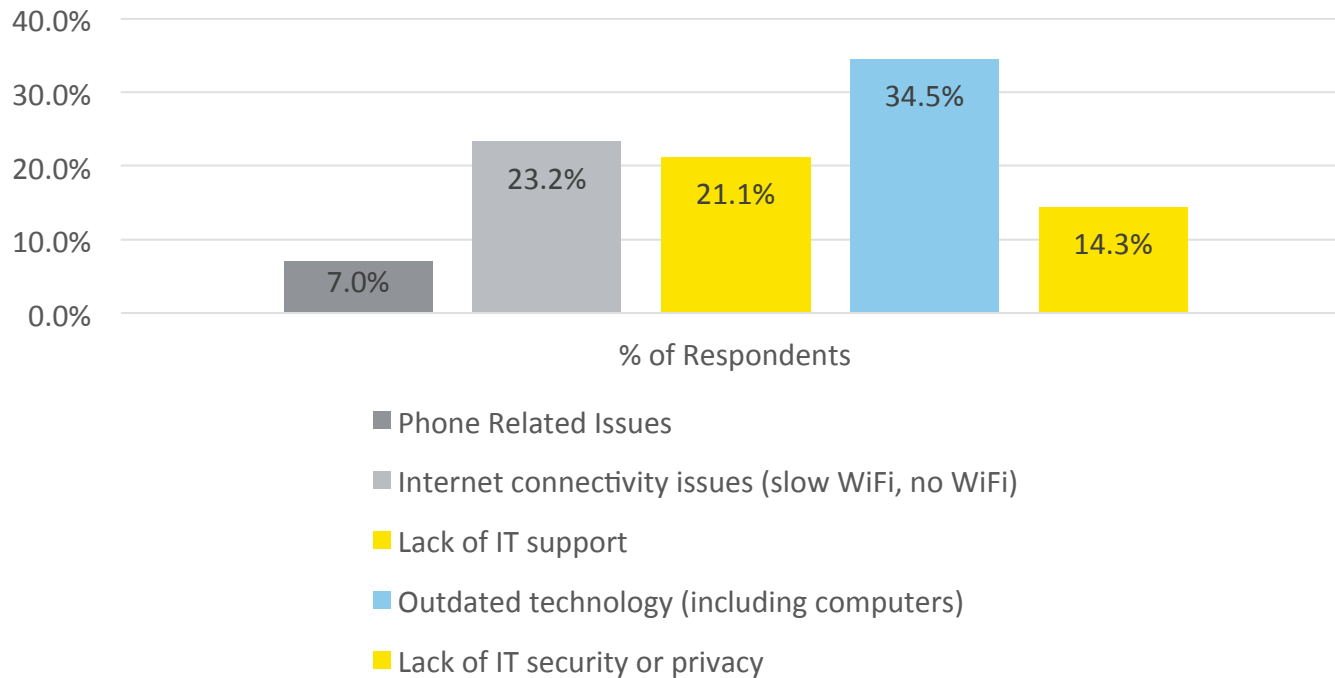
TECH DIVERSITY

WHAT DO YOU SEE AS THE BIGGEST CHALLENGE TO DIVERSITY IN THE TECH INDUSTRY?



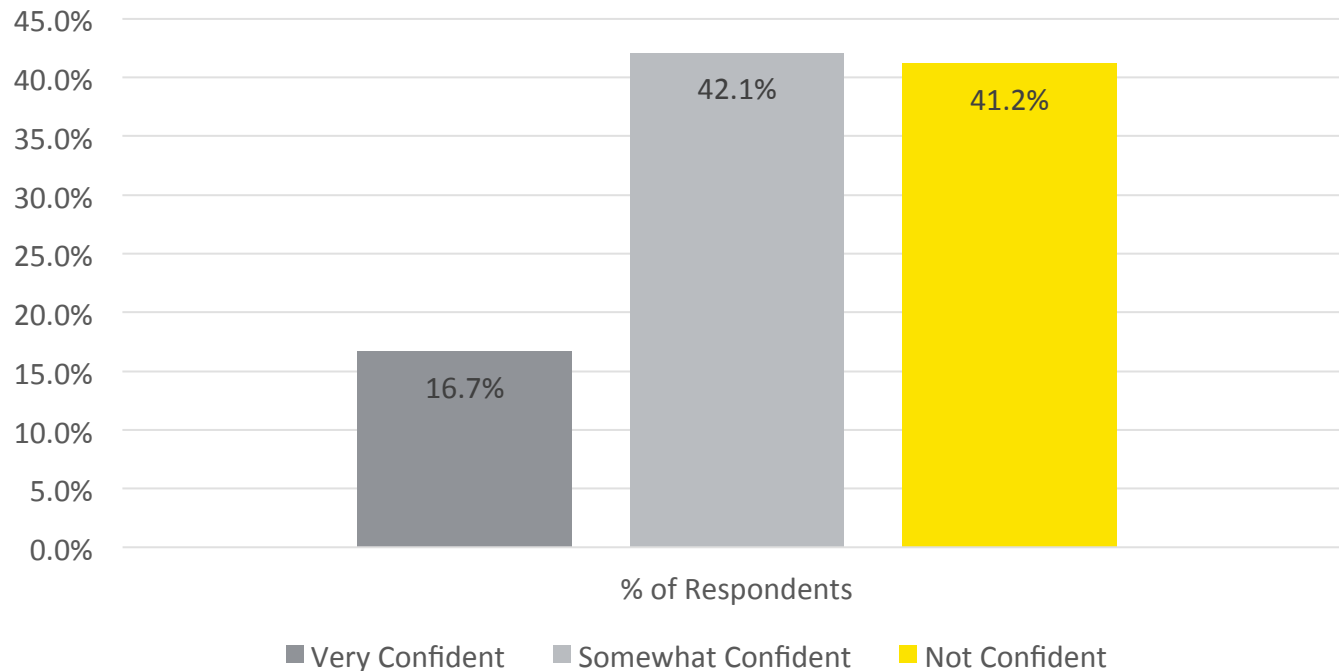
IT PROBLEMS

WHAT IS YOUR GREATEST SOURCE OF IT ANGST IN YOUR WORKPLACE?



2016 CANDIDATES

WITH THE 2016 PRESIDENTIAL ELECTIONS AROUND THE CORNER, HOW CONFIDENT ARE YOU THAT MAKING THE U.S. A LEADER IN TECHNOLOGY IS A PRIORITY TO THE CANDIDATES?



Modis Survey
Key Findings
September 29, 2015

Introduction and Methodology:

Modis fielded a survey regarding behaviors, perceptions and attitudes tied to technology, job satisfaction and other employment-focused themes, aimed at discovering media-friendly data. Allison+Partners surveyed 1,010 individuals in the United States over the age of 18, with panel services from Qualtrics.

Survey Highlights:

- 60.9% of respondents agree with the statement ‘The U.S. is a global leader in the technology industry today.’ Respondents in the age group of 26 – 34 were most likely to agree with that statement (72%).
- Of respondents who agreed that the U.S. is a global technology leader, 79.1% felt that leadership will continue for the next five years. Additionally, 94% felt that technology education was important in maintaining the United States’ leadership in the technology industry.
- Among respondents who disagreed that the U.S. is a global technology leader, a lack of quality education was the reason most cited as contributing to the United States not being a global leader in the technology industry (56.5%), followed by a lack of government support of tech growth (39.3%) and a lack of financial investment in tech innovation (38.7%).
- Healthcare was by far the industry most respondents felt would have the greatest need for tech talent in the next five years, selected by 46% of respondents.
- Younger individuals are more willing to relocate; those ages 18 – 25 were most likely to indicate they would relocate, followed by those ages 26 – 34, then by those ages 35 – 54.
- Of those respondents who were willing to relocate, the largest group (35.0%) indicated they would expect a salary increase of between 20 – 29% after relocating. The second largest group of these respondents (27.6%), expected a 40% or greater increase in salary after relocating. 23.2% expected a 30 – 39% increase, 13.1% expected a 10 – 19% increase, and just 1.1% expected a 0 – 9% increase.
- Of those respondents who were willing to relocate, 51.5% were most willing to relocate to the Northwest. 29.5% would not be willing to relocate to the Northeast.
- Regarding the 2016 presidential elections, 41.2% of respondents were not confident that establishing the U.S. as a leader in technology is a priority to the candidates. 42.1% were somewhat confident that it was a priority, and 16.7% were very confident. Older respondents (ages 55 – 64 and 65+) were more likely to not be confident, whereas younger respondents (ages 18 – 25 and 26 – 34) were more likely to express confidence.

Survey Data:

- Q2.1: Do you agree or disagree with the following statement: The U.S. is a global leader in the technology industry today.

Total Answering	1,010
Strongly Disagree	4.0%
Disagree	12.7%
Neither Agree nor Disagree	22.5%
Agree	42.8%
Strongly Agree	18.1%

- 60.9% of respondents agree with the statement.
 - Respondents in the age group of 26 – 34 were most likely to agree with that statement (72%).
- Q2.2: Do you agree or disagree with the following statement: I believe that the U.S. will continue to be a global leader in the technology industry in the next 5 years.

Total Answering	NOTE: Among respondents who agreed that the U.S. is a global tech leader in Q2.1 (approx. 616 respondents)
Strongly Disagree	0.2%
Disagree	2.5%
Neither Agree nor Disagree	18.1%
Agree	72.2%
Strongly Agree	6.9%

- Of respondents who agreed that the U.S. is a global technology leader, 79.1% felt that leadership will continue for the next five years.
- Q2.3: Do you agree or disagree with the following statement: I believe technology education in the U.S. is important to maintaining the country’s status as a global leader in the industry.

Total Answering	NOTE: Among respondents who agreed that the U.S. is a global tech leader in Q2.1 (approx. 616 respondents)
Strongly Disagree	0.3%
Disagree	1.5%
Neither Agree nor Disagree	4.2%
Agree	41.6%
Strongly Agree	52.4%

- Of respondents who agreed that the U.S. is a global technology leader, 94% felt that technology education was important in maintaining the United States’ leadership in the technology industry.

- Q2.4: Do you agree or disagree with the following statement: I believe there is a need for increased technology education policy in the U.S.

Total Answering	NOTE: Among respondents who agreed that the U.S. is a global tech leader in Q2.1 (approx. 616 respondents)
Strongly Disagree	3.6%
Disagree	4.2%
Neither Agree nor Disagree	8.3%
Agree	38.1%
Strongly Agree	45.8%

- Q2.5: What factors do you believe most contribute to the U.S. NOT being a global leader in the technology industry today? Select all that apply.

Total Answering	NOTE: Among respondents who agreed that the U.S. is a global tech leader in Q2.1 (approx. 616 respondents)
Lack of quality education in the U.S.	56.5%
Lack of diversity in the U.S. tech workforce	25.0%
Lack of talent in U.S. workforce	23.8%
Lack of financial investment in U.S. tech innovation	38.7%
Lack of government support of U.S. Tech Growth	39.3%
Other	6.0%

- Among respondents who disagreed that the U.S. is a global technology leader, a lack of quality education was the reason most cited as contributing to the U.S. not being a global leader in the technology industry (56.5%), followed by a lack of government support of tech growth (39.3%) and a lack of financial investment in tech innovation (38.7%).
- Q3.1: Please indicate how strongly you agree or disagree with the following statements.
- Q3.2: Do you agree or disagree with the following statement: The demand for tech professionals in the U.S. will grow over the next five years.

Total Answering	1,010
Strongly Disagree	2.8%
Disagree	1.5%
Neither Agree nor Disagree	10.6%
Agree	46.3%
Strongly Agree	38.8%

- 85.1% of respondents felt that demand for tech professionals in the U.S. would grow over the next five years. Individuals 65 years or older were most likely to agree.
- Q3.3: Do you agree or disagree with the following statement: Tech jobs in the U.S. are lucrative compared to jobs in other fields.

Total Answering	1,010
Strongly Disagree	0.9%
Disagree	3.5%
Neither Agree nor Disagree	22.1%
Agree	48.9%
Strongly Agree	24.7%

- 73.6% of respondents agreed that tech jobs are lucrative compared to jobs in other fields. Those ages 65+ were most likely to agree.
- Q3.4: Do you agree or disagree with the following statement: Silicon Valley is the only place in the U.S. with lucrative jobs in technology.

Total Answering	1,010
Strongly Disagree	15.9%
Disagree	43.8%
Neither Agree nor Disagree	28.6%
Agree	7.6%
Strongly Agree	4.1%

- Even though Silicon Valley may be the first place people think of when it comes to technology, most people do not see technology jobs as being limited to Silicon Valley.
- Interestingly, respondents between ages 26 and 34 were the group most likely to agree with the premise, while those ages 55 – 64 and 65+ were most likely to disagree.
- Q4.1: Would you be willing to relocate within the U.S. for a position with a higher salary?

Total Answering	1,010
Yes	61.4%
No	38.6%

- Younger individuals are more willing to relocate; those ages 18 – 25 were most likely to indicate they would relocate, followed by those ages 26 – 34, then by those ages 35 – 54.

- Q4.2: What salary increase would you expect after agreeing to relocate?

Total Answering	NOTE: Respondents who responded yes to Q4.1 (approx. 616 respondents)
Percentage Increase	Percentage of Respondents
0-9%	1.1%
10-19%	13.1%
20-29%	35.0%
30-39%	23.2%
40% or greater	27.6%

- Of those respondents who were willing to relocate, the largest group (35.0%) indicated they would expect a salary increase of between 20 – 29% after relocating. The second largest group of these respondents (27.6%), expected a 40% or greater increase in salary after relocating. 23.2% expected a 30 – 39% increase, 13.1% expected a 10 – 19% increase, and just 1.1% expected a 0 – 9% increase.

- Q4.3: What U.S. region would you be willing to relocate to? Choose all that apply.

Total Answering	NOTE: Respondents who responded yes to Q4.1 (approx. 616 respondents)
Mid-Atlantic	40.0%
Mid-West	46.8%
Northeast	44.7%
Northwest	51.5%
Southeast	45.0%
Southwest	48.4%

- Q4.4: What U.S. region would you NOT be willing to relocate to, even with a substantial salary increase? Select all that apply.

Total Answering	NOTE: Respondents who responded yes to Q4.1 (approx. 616 respondents)
Mid-Atlantic	18.9%
Mid-West	26.0%
Northeast	29.5%
Northwest	15.3%
Southeast	27.7%
Southwest	21.5%

- Q5.1: In general, do you think tech professionals are overpaid, paid enough or underpaid?

Total Answering	1,010
Overpaid	10.2%
Paid enough	73.7%
Underpaid	16.1%

- Q5.2: Do you feel that your employer pays you appropriately for your level of experience?

Total Answering	1,010
Yes	35.8%
No	37.1%
Don't know	27.0%

- Of people who are employed (approx. 585 respondents), about half (48.2%) think their employer pays them appropriately for their level of experience compared to about half that think their employer does not (43.6%).
- Individuals between the ages of 26 and 34 were most likely to indicate they felt their employer paid them appropriately for their experience.

- Q5.3: How confident do you feel in your employer's ability to secure your personal information and keep it confidential?

Total Answering	1,010
Very confident	29.2%
Somewhat confident	48.0%
Not confident	22.8%

- 77.2% of respondents felt at least somewhat confident that their employer had the ability to secure their personal information and keep it confidential. Younger respondents were more likely to be very confident in their employer (42% of those ages 18 – 25 and 47% of those ages 26 – 34) than others.
- In addition, respondents with a professional degree were more likely to be very confident (50% of those with a JD or MD) in their employer.

- Q5.4: Which industry do you think will have the greatest need for increased technology talent in the next five years?

Total Answering	1,010
Heathcare	46.0%
Government	13.4%
Education	16.1%
Finance	7.6%
Retail	3.8%

Utilities	8.8%
Other	4.3%

- Healthcare was by far the industry most respondents felt would have the greatest need for tech talent in the next five years, selected by 46% of respondents.

- Q5.5: What do you see as the biggest challenge to diversity in the tech industry?

Total Answering	1,010
Age	55.2%
Ethnicity	18.3%
Gender	20.7%
Religion	5.7%

- Age is considered by far the largest challenge to diversity in the technology industry.
- Younger people, under the age of 25, were the group most likely to cite gender as the largest diversity issue.

- Q5.6: What is your greatest source of IT angst in your workplace?

Total Answering	1,010
Phone related issues	7.0%
Internet connectivity issues (slow WiFi, no WiFi)	23.2%
Lack of IT support	21.1%
Outdated technology (including computers)	34.5%
Lack of IT security or privacy	14.3%

- Respondents in the 18 – 25 and 26 – 34 age groups were much more likely to select internet connectivity issues (slow WiFi, no WiFi) than any other group. Of the respondents, 37% of people ages 18 – 25 and 30% of people ages 26 – 24 selected internet connectivity issues as the greatest source of angst.
- Respondents in the 35 – 54, 55 – 64 and 65+ age groups were much more likely to select outdated technology. Of the respondents, 37% of people ages 35 – 54; 40% of people ages 55 – 64; and 36% of people ages 65+ chose this issue as the greatest source of angst.

- Q5.7: Which of the following do you think is the coolest tech job?

Total Answering	1,010
Mobile application developer	15.0%
Web application developer	23.6%
Business data analyst	6.5%
Data scientist	10.8%

Software engineer	24.5%
IT project manager	9.6%
Data security manager	10.1%

- Q5.8: What benefit would appeal most to you in a job?

Total Answering	1,010
Paid, long-term maternity/paternity leave	8.2%
Flex-hours	50.1%
On-site dry cleaning	1.9%
Unlimited on-site food	5.1%
On-site gym/fitness classes	4.0%
On-site childcare	5.7%
Unlimited vacation time	21.0%
Sabbaticals	4.0%

- When people were asked what the best job benefit is, the majority said having flex-hours.
 - Younger respondents were much more likely to cite paid, long-term maternity/paternity leave.
 - Respondents in the 18 – 25 and 26 – 34 age groups were much more likely to select paid, long-term maternity/paternity leave than any other group. Of the respondents, 25% of people ages 18 – 25 and 17% of people ages 26 – 24 selected this benefit.
- Q5.9: With the 2016 presidential elections around the corner, how confident are you that making the U.S. a leader in technology is a priority to the candidates?

Total Answering	1,010
Very confident	16.7%
Somewhat confident	42.1%
Not confident	41.2%

- Regarding the 2016 presidential elections, 41.2% of respondents were not confident that establishing the U.S. as a leader in technology is a priority to the candidates. 42.1% were somewhat confident that it was a priority, and 16.7% were very confident.
 - Older respondents (ages 55 – 64 and 65+) were more likely to not be confident, whereas younger respondents (ages 18 – 25 and 26 – 34) were more likely to express confidence. Of the respondents, 54% of people ages 55 – 64 and 65+ were more likely to not be confident while 76% of people ages 18 – 25 and 26 – 34 were at least somewhat confident.