



2022

REPUTATION OF BIGTECH

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FOREWORD

Our 2022 report shows that the reputation of BigTech is on a decline. This is the result of a year where the sector, and especially Facebook/Meta, has been under a great deal of public and political scrutiny – caused by cases concerning data privacy, data breaches and misinformation.

BigTech is at a watershed moment in terms of public trust and affinity. After many years of unbridled growth and innovation, people, governments and regulators are now realizing that something must be done to limit surveillance capitalism and the influence that BigTech has on our lives. In 2021, governments in China, US and EU all passed new legislation on competition, data protection and data-sharing, conduct of business and more, showing the increasing mistrust in the sector and its ability to self-regulate.

To retain and regain stakeholder trust, the sector needs to balance expectations for innovation and integrity. While the first is inherently built into the industry, it seems to come at the cost of the latter. Integrity – the degree to which companies are seen

to be acting responsibly – is the sector's weakest reputational attribute. While innovation is crucial, the report shows that people mostly expect BigTech to protect the rights of the individual. The most important issues for BigTech to solve are data privacy, data protection and responsible business conduct. This underlines the importance of corporate responsibility as a foundation for trust.

However, skepticism towards BigTech is high. Most people are reluctant to share data about themselves in exchange for access to free services or demand increased regulation of the sector. To reduce skepticism, BigTech companies must make substantial strides on initiatives that demonstrate integrity in order to earn back the trust and affinity of people – and not wait for governments and regulators to do it for them.

This report also includes a global reputation ranking of BigTech and selected technology companies.



Søren Holm
Senior Advisor



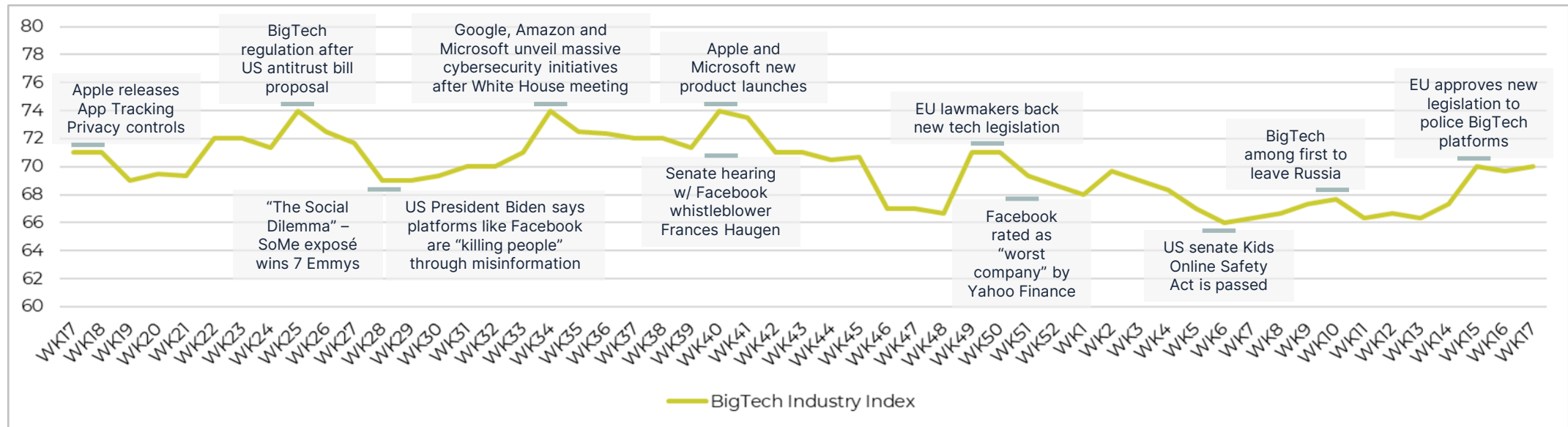
Mari Epland
Analyst



GLOBAL SECTOR REPUTATION

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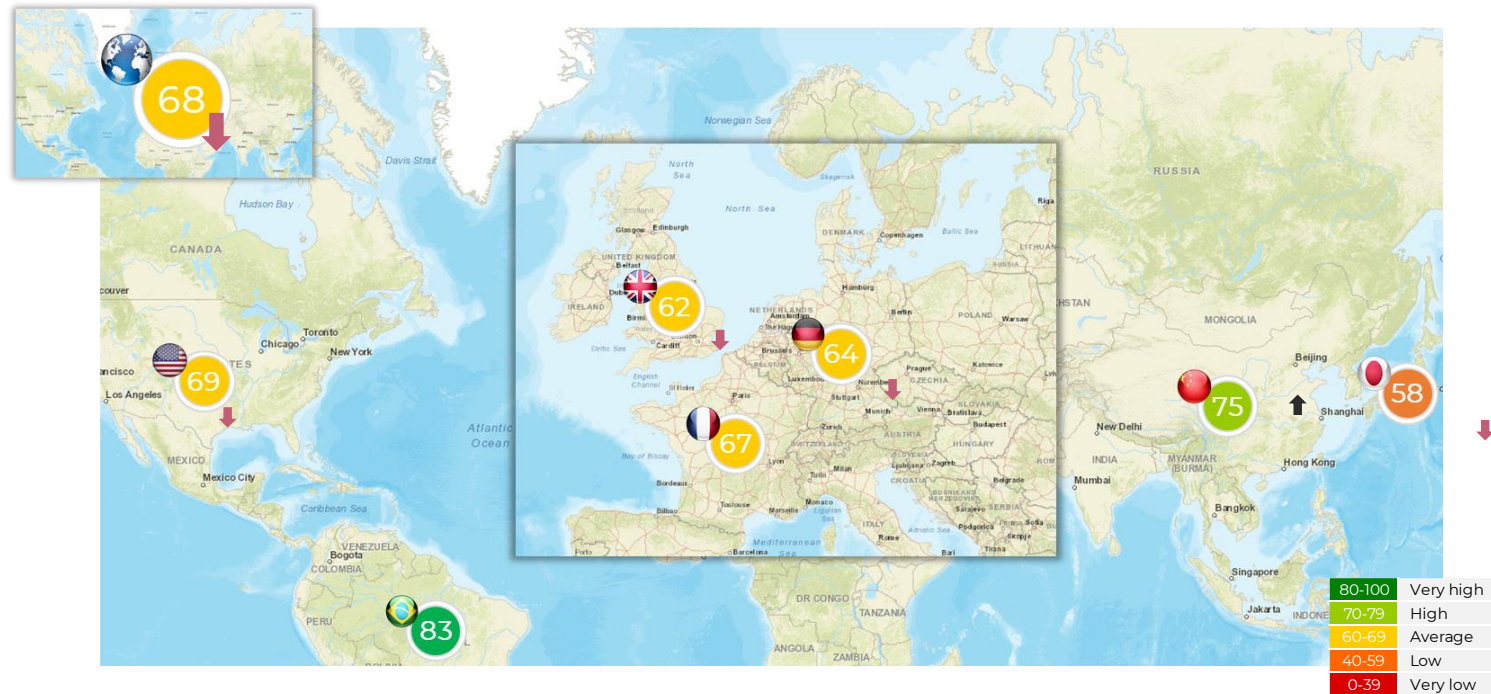
Sector reputation trends down as public and regulatory scrutiny increases



In the past 12 months, the Trust & Like Score for the global index of BigTech companies has seen substantial fluctuations and an overall downward trend.

Main impacting factors have been public and political scrutiny around data privacy, data protection and misinformation. Several new regulations of BigTech have been passed in the US and EU, however BigTech has also undertaken several new self-imposed initiatives to meet rising demand for privacy and data security.

Global trust is at an average level and trends negatively, but markets differ hugely



The global Trust & Like Score for the BigTech sector is 68 – a decline of 2 points from 2021.

Perceptions of the sector trend down in Europe, US and Japan, while slightly improving in China. The largest fluctuations are seen in UK and Japan with 6-point drops in both markets. In the US, the score declines by 4 points.

The sector is strong on competence and weak on character.



INNOVATION
Score: 73

BigTech's clear reputational strength is Innovation.

Innovation is closely connected to the company's products & services, as well as its leadership – which are all elements that are seen as strengths for the sector.



INTEGRITY
Score: 66
RELEVANCE
Score: 66

In contrast, the sector's weakest attributes are Integrity and Relevance

People's inability to relate to what BigTech companies stand for may well relate to the fact that the sector is faced with public and political scrutiny on multiple issues, like data privacy, data security, ethical behavior, compliance, fair competition etc.

The gap between innovation and integrity is causing a dichotomy in public perception



BIGTECH IS LOVED BY:

- Frequent users
- Young demographics
- Target professional segments



BIGTECH SHOULD BE CONCERNED BY:

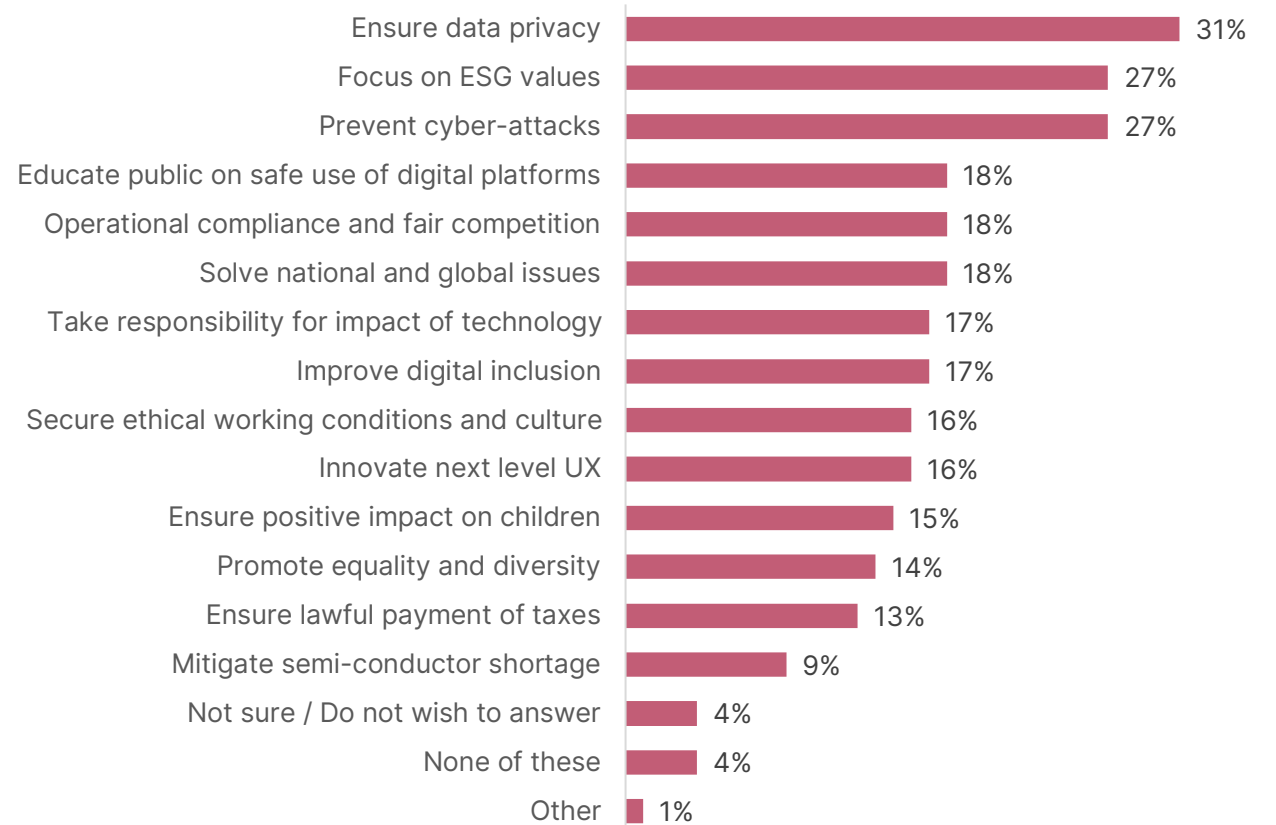
- A massive drop in trust and affinity from ages 35 and up
- 24% of people saying that they do not use or are not interested in engaging with BigTech
- Exposure to Products/Services and communication from or about BigTech is not having a strong positive effect on perceptions of Integrity

Most people want BigTech to protect them and do good

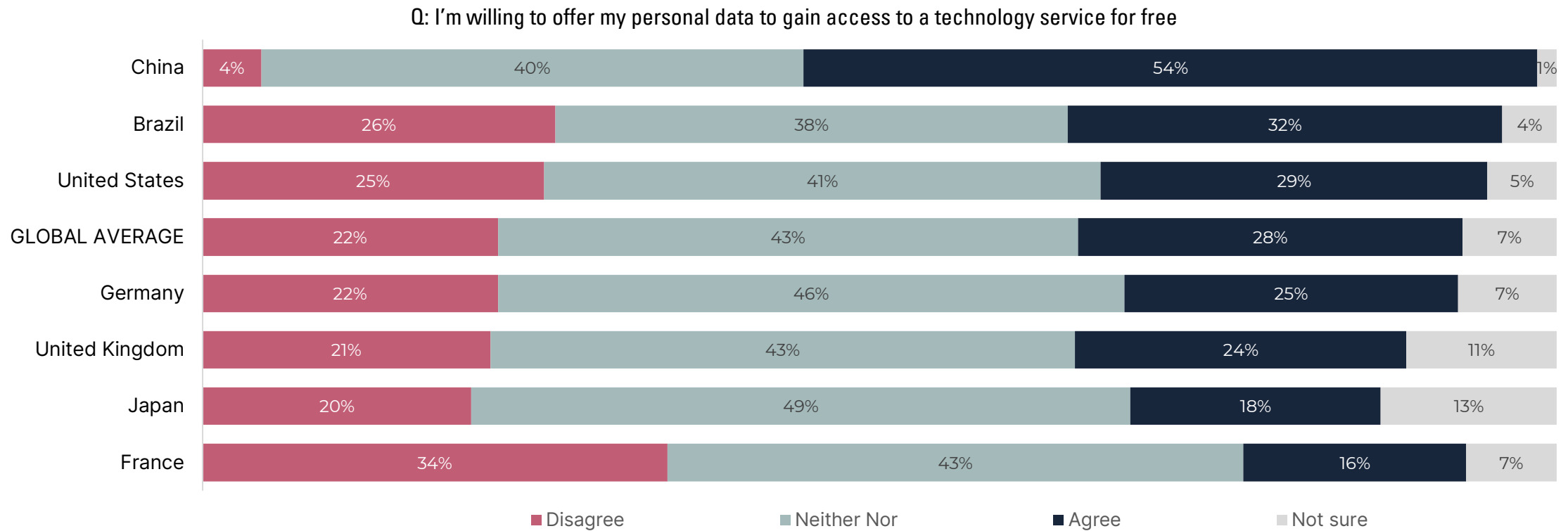
BIGTECH COMPANIES ARE MOST EXPECTED TO FOCUS ON SAFETY, SECURITY AND RESPONSIBILITY:

- Ensuring privacy of personal data
- Safeguarding entrusted data from cyber-attacks
- Operating with a clear focus on sustainability, environment, ethics and social values

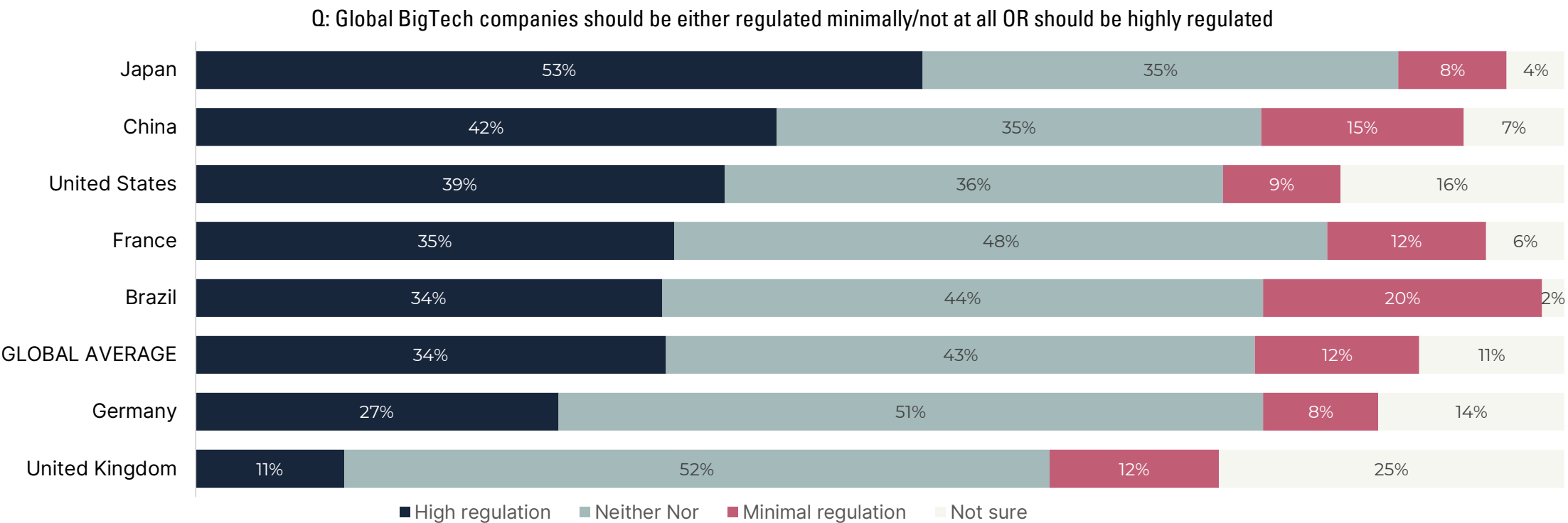
Q: From the list below, please select the three issues, which you believe are most relevant for technology companies to address.



Public skepticism towards surveillance capitalism is highest in Europe and in Japan



Requests for increased regulation shows fundamental mistrust in BigTech



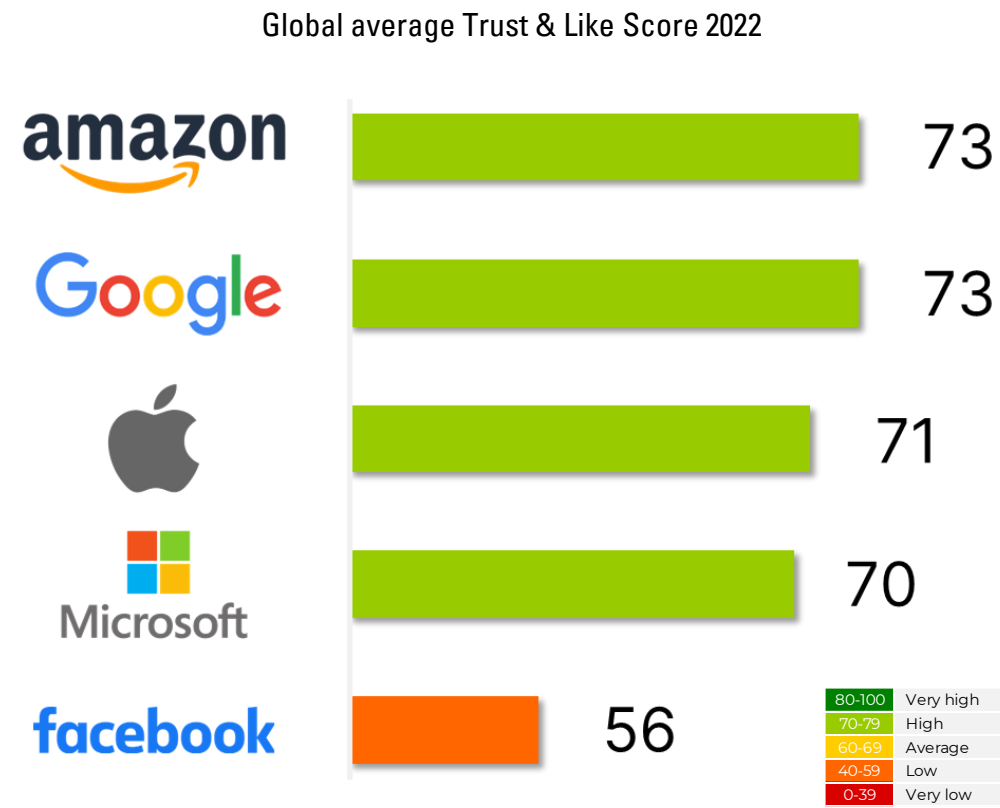


REPUTATION RANKING

BIGTECH & TECHNOLOGY SECTOR

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Amazon and Google are the best perceived BigTech companies. Facebook struggles after a difficult year.



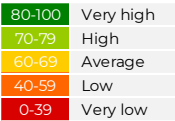
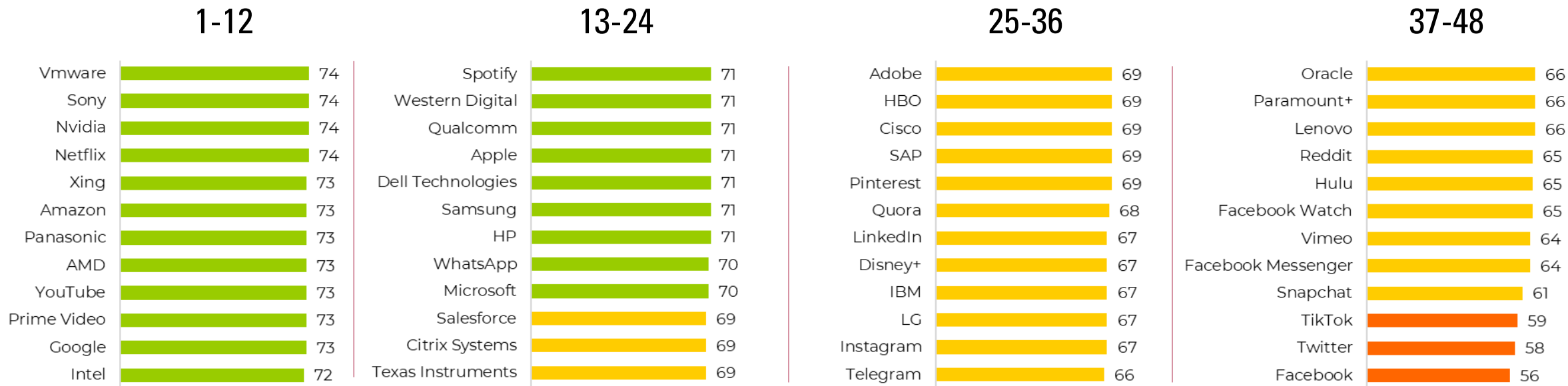
While Apple ranks #3 in TLS, it outperforms Amazon and Google on Innovation, Leadership and Integrity.

Apple is the only BigTech company to have a high score (71) on Integrity.



VMware, Sony, Nvidia and Netflix share the top spot as the most trusted and liked companies in Tech

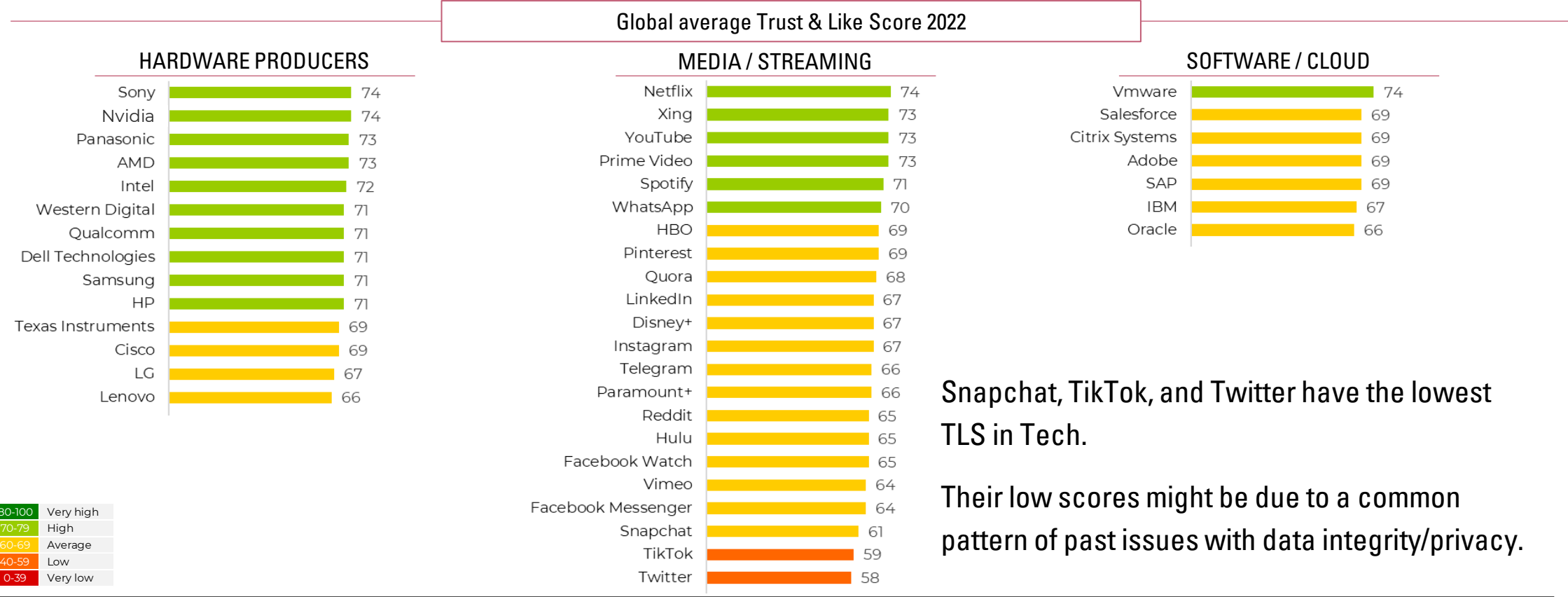
Global average Trust & Like Score 2022



Global data collected in May 2022
Results are based on average scores across Brazil, China, France, Germany, Japan, United Kingdom and United States



Hardware producers are on average better perceived than companies in other tech categories. Scores vary widely in the media/streaming category.



Global data collected in May 2022
Results are based on average scores across Brazil, China, France, Germany, Japan, United Kingdom and United States



SUMMARY

- The 2022 Trust & Like Score for the BigTech sector is 68 – a decline of 2 points from 2021.
 - Amazon and Google are the most trusted and liked companies in BigTech in 2022.
 - Innovation is the best perceived attribute for BigTech, while Integrity and Relevance are the weakest perceived.
 - BigTech is loved by young demographics, frequent users and key professional segments, while most challenged by ages 35+, and a large group of disengaged people.
 - Concern about surveillance capitalism is high. In Europe people are less likely to share personal data for free services, while calls for increased regulation is highest in Japan, China and US.
 - To improve trust and affinity with stakeholders, BigTech companies should focus on digital safety and security and corporate responsibility.
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ABOUT THIS REPORT

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PERCEPTION DATA

Caliber monitors perceptions of thousands of companies around the world on a daily basis through automated online interviews with real people across various stakeholder groups.

This report is based on the insights gathered throughout 2022 from interviews conducted in Brazil, China, France, Germany, Japan, UK and USA. The data is based on approximately 20,000 evaluations from interviews with more than 15,000 people.

The companies included in this report were selected as market leaders in the technology sector worldwide and are therefore seen as representative of the industry.

In each country, the respondents are randomly selected, and the sample is representative of the national population in terms of gender, region and age within the age span of 18 to 75.

The representative nature of the sample in this study is achieved solely by setting demographic quotas. There is no weighting of raw data or results.

METHODOLOGY

There is ample proof that stakeholder behavior is linked to the degree to which people trust and like a company. Therefore, the Trust & Like Score is the central element used by Caliber in measuring the strength of a company's brand and reputation.

To better explain the meaning of the Trust & Like Score we explore several attributes related to Brand, Reputation and Behavior – as well as information around demographics, professional background and the touchpoints through which stakeholders interact with companies.

To better understand whether a certain score is positive or negative, we use a normative scale that shows how the particular result compares with Caliber's database consisting of similar studies.



ABOUT CALIBER



Caliber aims to make business more trusted and trustworthy.



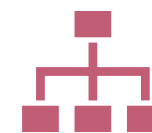
Through Real-Time Tracker, our continuous people listening platform, we radically change the brand & reputation monitoring field with a unique combination of real-time stakeholder tracking and corporate brand & reputation expertise.



We help data-driven communicators and marketers capture stakeholder sentiment through daily online surveys and convert it into actionable insights that improve stakeholder preference and advocacy.



Our platform is fully customizable, globally scalable and more cost-effective than traditional research methods. It brings accurate and representative reputation data to its users, and allows them to share it across the business, and integrate it with media monitoring.



As a result, the business becomes more agile and capable of both mitigating risks and optimizing activities across multiple arenas: from customer loyalty and employer attractiveness, to CSR position and investor appeal.