Survey of House Battleground Voters

Prepared for the New Democrat Coalition
January 7, 2022
Methodology

• This presentation displays the results of an online survey among approximately 40 registered voters in each of the following Battleground Congressional Districts: AZ-01, CA-10, GA-07, IA-03, IL-14, ME-02, MI-08, MN-02, NH-01, NJ-03, NY-19, OR-04, PA-08, TX-07, TX-32, VA-02, VA-07, WA-08, WI-03.

• The survey was conducted November 13-22, 2021.

• In 95 cases out of 100, the responses to this survey should fall within ±3.5% of those that would have been obtained from interviewing the entire population of registered voters in Battleground Congressional Districts listed above. The sampling error for subgroups of the survey will be greater.

• The data have been weighted by sex, education, age, race, party identification within urbanicity, retrospective 2020 presidential vote, and region to better reflect the composition of the electorate.
Demographics

52 Female
48 Male

35 Age 18-44
26 Age 45-59
39 Age 60 or older

89 White
6 Hispanic
3 Black
2 AAPI

44 Income <$60k
56 Income $60k+

84 Non-Union HH
16 Union HH

61 No degree
39 College grad

48 Rural
31 Suburban
21 Urban

48 Biden
46 Trump
2 Other
4 Did not vote

37 Republican
32 Independent
30 Democrat
Key Takeaways

- Most Battleground Democrats and Independents have some concerns about tech, but also see the industry as a source for helpful products and good job opportunities. They do not support "leaving tech alone" OR breaking up Big Tech.

- Democrats and Independents do not prioritize tech as a public policy issue - but when they are asked about regulatory priorities for tech, their focus is on data privacy and security.

- After learning about the impact of antitrust legislation – hearing both arguments for and against – support moves against the legislation by 31 points among Democrats and 40 points among Independents.

- Most voters do not think tech competition legislation will help them and in fact believe that it may hurt them. They are especially inclined to oppose the bills if they negatively impact Amazon Prime.

- President Biden has a 45%-55% job approval in the Battleground.
Electoral Approval Snapshot
President Biden’s approval ratings among battleground CD voters is closely in line with the national average. A majority disapproves of the job he is doing as President, especially white voters without a college degree and rural voters.

Joe Biden Approval Rating

- **Overall**: Strongly approve - 45, Somewhat approve - 14, Strongly disapprove - 17, Somewhat disapprove - 11
- **Democrats**: Strongly approve - 28, Somewhat approve - 40, Strongly disapprove - 12, Somewhat disapprove - 7
- **Independents**: Strongly approve - 11, Somewhat approve - 34, Strongly disapprove - 38, Somewhat disapprove - 4
- **Republicans**: Strongly approve - 89, Somewhat approve - 13, Strongly disapprove - 76, Somewhat disapprove - 4
Voter Priorities
We asked voters about their top issue priorities. Even when allowed to choose multiple issues, tech regulation is not a priority for these battleground voters.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Controlling inflation</td>
<td>40</td>
</tr>
<tr>
<td>Strengthening the national economy</td>
<td>39</td>
</tr>
<tr>
<td>Protecting our borders</td>
<td>34</td>
</tr>
<tr>
<td>Cutting taxes</td>
<td>21</td>
</tr>
<tr>
<td>Creating more clean energy</td>
<td>20</td>
</tr>
<tr>
<td>Building and repairing roads and bridges</td>
<td>16</td>
</tr>
<tr>
<td>Cutting prescription prices</td>
<td>14</td>
</tr>
<tr>
<td>Improving public schools</td>
<td>10</td>
</tr>
<tr>
<td>Regulating technology companies</td>
<td>5</td>
</tr>
</tbody>
</table>
When using the language of tech regulation proponents, there is initial support (62%) for increased competition.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Strongly favor</th>
<th>Somewhat favor</th>
<th>Somewhat oppose</th>
<th>Strongly oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowing Medicare to negotiate with pharmaceutical companies to get lower prices</td>
<td>55</td>
<td>32</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Spending $1 trillion to improve roads, bridges, broadband, and on other infrastructure projects</td>
<td>34</td>
<td>36</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Imposing taxes known as tariffs on some goods that are made in other countries and imported to the United States</td>
<td>23</td>
<td>40</td>
<td>19</td>
<td>8</td>
</tr>
<tr>
<td>Passing new laws to increase competition against big technology companies</td>
<td>25</td>
<td>37</td>
<td>13</td>
<td>7</td>
</tr>
<tr>
<td>Legalizing marijuana for recreational use</td>
<td>31</td>
<td>26</td>
<td>15</td>
<td>22</td>
</tr>
<tr>
<td>Allowing undocumented immigrants who were brought to the U.S. as children to remain in the United States and eventually apply for citizenship</td>
<td>27</td>
<td>30</td>
<td>14</td>
<td>24</td>
</tr>
<tr>
<td>Spending $3.5 trillion on social programs like childcare, education, family tax breaks, and expanding Medicare for seniors</td>
<td>26</td>
<td>28</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td>Making abortion against the law after six weeks of pregnancy</td>
<td>24</td>
<td>15</td>
<td>12</td>
<td>40</td>
</tr>
<tr>
<td>A new tax on carbon-based fuels like coal, oil, and natural gas</td>
<td>16</td>
<td>22</td>
<td>21</td>
<td>32</td>
</tr>
</tbody>
</table>
Tech and Power
There are three kinds of attitudes about tech with most voters (59%) wanting some government action on tech.

Which of the following is closer to your opinion, even if none of them is exactly right?

- The government should make sure that big technology companies use their power responsibly: 59%
- The government should break up the power of big technology companies: 24%
- The government should not interfere with America's technology sector: 17%
These voters tend to be more female and almost evenly split among party.

Which of the following is closer to your opinion, even if none of them is exactly right?

- The government should make sure that big technology companies use their power responsibly
- 55% Female
- 36% Age 18-44
- 26% Age 45-59
- 38% Age 60+
- 60% No degree
- 88% White
- 6% Hispanic
- 3% Black
- 1% Asian
- 35% Dem, 32% Ind, 33% GOP
- 52% Biden Approval
Those who are against any form of regulation are more female, older, and Republican.

Which of the following is closer to your opinion, even if none of them is exactly right?

62% Female
32% Age 18-44
26% Age 45-59
42% Age 60+
59% No degree
87% White
7% Hispanic
5% Black
3% Asian
18% Dem, 32% Ind, 50% GOP
30% Biden Approval

The government should not interfere with America's technology sector
17

59

24
And the 24% who want these companies broken up lean more male and older with higher disapproval of President Biden.

Which of the following is closer to your opinion, even if none of them is exactly right?

- The government should break up the power of big technology companies (24)
- 39% Female
- 33% Age 18-44
- 27% Age 45-59
- 40% Age 60+
- 64% No degree
- 91% White
- 4% Hispanic
- 3% Black
- 1% Asian
- 28% Dem, 33% Ind, 39% GOP
- 38% Biden Approval
- 17
- 59
These segments are useful because the majority opinion is very winnable for Democrats.

Not Interfere (17%)
- 62% Female
- 32% Age 18-44
- 26% Age 45-59
- 42% Age 60+
- 59% No degree
- 87% White
- 7% Hispanic
- 5% Black
- 3% Asian
- 18% Dem, 32% Ind, 50% GOP
- 30% Biden Approval

Responsibly (59%)
- 55% Female
- 36% Age 18-44
- 26% Age 45-59
- 38% Age 60+
- 60% No degree
- 88% White
- 6% Hispanic
- 3% Black
- 1% Asian
- 35% Dem, 32% Ind, 33% GOP
- 52% Biden Approval

Break up (24%)
- 39% Female
- 33% Age 18-44
- 27% Age 45-59
- 40% Age 60+
- 64% No degree
- 91% White
- 4% Hispanic
- 3% Black
- 1% Asian
- 28% Dem, 33% Ind, 39% GOP
- 38% Biden Approval
Most battleground voters (86%) have at least some concern about tech companies but only 26% want aggressive government intervention.

Which of the following is closer to your opinion, even if none of them is exactly right?

- I have some concerns about technology companies, but I think their apps and products make my life easier. 31%
- I do not really have any concerns about how technology companies operate. 14%
- I have some concerns about technology companies, but I would still like to see more technology jobs and opportunities in my community. 29%
- I have deep concerns about how technology companies operate, and want the government to act aggressively to address their negative impacts. 26%
- I do not really have any concerns about how technology companies operate. 14%
Those without concerns are almost evenly split among gender, party, and age.

Which of the following is closer to your opinion, even if none of them is exactly right?

- 57% Female
- 33% Age 18-44
- 28% Age 45-59
- 38% Age 60+
- 66% No degree
- 94% White
- 1% Hispanic
- 1% Black
- 3% Asian
- 63% Rural, 25% Suburban, 12% Urban
- 29% Dem, 35% Ind, 36% GOP
- 38% Biden Approval

I do not really have any concerns about how technology companies operate
However, those with deep concerns lean more male, older, and Republican.

Which of the following is closer to your opinion, even if none of them is exactly right?

I have deep concerns about how technology companies operate, and want the government to act aggressively to address their negative impacts.

45% Female
26% Age 18-44
29% Age 45-59
45% Age 60+
62% No degree
93% White
3% Hispanic
2% Black
1% Asian
47% Rural, 31% Suburban, 22% Urban
27% Dem, 34% Ind, 38% GOP
42% Biden Approval
The two groups that have some concerns which are outweighed by the benefits are more female and almost evenly split by party.

Which of the following is closer to your opinion, even if none of them is exactly right?

54% Female
42% Age 18-44
25% Age 45-59
34% Age 60+
59% No degree
83% White
10% Hispanic
5% Black
2% Asian
51% Rural, 31% Suburban,
18% Urban
32% Dem, 28% Ind, 40% GOP
48% Biden Approval

I have some concerns about technology companies, but I think their apps and products make my life easier

31

I have some concerns about technology companies, but I would still like to see more technology jobs and opportunities in my community

29

54% Female
37% Age 18-44
23% Age 45-59
40% Age 60+
59% No degree
88% White
6% Hispanic
3% Black
2% Asian
39% Rural, 34% Suburban,
27% Urban
33% Dem, 34% Ind, 34% GOP
47% Biden Approval
Views on Impacts of Senate Tech Proposals
Far fewer voters (35%) have heard anything about potential new tech laws. Those who have are higher income, men, and without children under 18 in the household.

*As you may know, Congress is considering passing new laws to increase competition against big technology companies.*

First, how much have you heard about this?

- 35% Heard
- 69% No children in HH
- 64% $60,000+
- 55% Biden Voters
- 54% Biden Approval
- 21% Urban, 48% Rural, 31% Suburban
- 34% Dem, 28% Ind, 38% GOP
- 43% Age 18-44, 25% 45-59, 32% 60+
- 29% Rural Men
We presented battleground voters with very simple arguments from supporters and opponents of these potential new laws. They were balanced for time and overall content.

Supporters of new laws to increase competition against big technology companies say that the new laws would stop the anti-competitive practice called self-preferencing, which happens when tech companies unfairly give their own products and services preference over those of its competitors, harming small businesses and consumers.

Opponents of these new laws to increase competition against big technology companies say that the regulations end up hurting consumers by breaking products that people like. These new laws make it impossible for Amazon to offer Prime shipping, stop Google searches from showing Google Maps results, and mean iPhones could not come preloaded with iMessage or FaceTime.
That initial support is very shallow. Simple information that allows supporters of the proposals to make their best arguments falls flat in the face of losing the convenience of Prime shipping and Google maps. Women, white voters without college degrees, and middle-aged voters become plurality opposed—critical constituencies in 2022.

**Having heard that, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose these proposed new laws?**

<table>
<thead>
<tr>
<th></th>
<th>Initial</th>
<th>Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dem</td>
<td>67-15</td>
<td>50-29</td>
</tr>
<tr>
<td>Ind</td>
<td>63-19</td>
<td>40-36</td>
</tr>
<tr>
<td>GOP</td>
<td>59-24</td>
<td>38-42</td>
</tr>
<tr>
<td>Northeast</td>
<td>71-16</td>
<td>46-32</td>
</tr>
<tr>
<td>South</td>
<td>61-22</td>
<td>47-35</td>
</tr>
<tr>
<td>Midwest</td>
<td>61-20</td>
<td>39-35</td>
</tr>
<tr>
<td>West</td>
<td>57-21</td>
<td>38-42</td>
</tr>
<tr>
<td>Men</td>
<td>67-22</td>
<td>55-30</td>
</tr>
<tr>
<td>Women</td>
<td>58-17</td>
<td>31-42</td>
</tr>
<tr>
<td>18-44</td>
<td>64-22</td>
<td>52-31</td>
</tr>
<tr>
<td>45-59</td>
<td>66-16</td>
<td>37-39</td>
</tr>
<tr>
<td>60+</td>
<td>58-20</td>
<td>37-39</td>
</tr>
<tr>
<td>White</td>
<td>63-20</td>
<td>42-35</td>
</tr>
<tr>
<td>Non-white</td>
<td>59-20</td>
<td>43-41</td>
</tr>
<tr>
<td>White/No deg</td>
<td>60-19</td>
<td>37-37</td>
</tr>
<tr>
<td>White/Coll grad</td>
<td>67-21</td>
<td>51-32</td>
</tr>
</tbody>
</table>
Only the 24% who want to break up tech companies are unmoved and they are heavily older, male, and uneducated, with higher disapproval of President Biden.

Having heard that, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose these proposed new laws?

<table>
<thead>
<tr>
<th>Decision</th>
<th>Initial</th>
<th>Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Break up</td>
<td>74-18</td>
<td>68-13</td>
</tr>
<tr>
<td>Use responsibly</td>
<td>63-16</td>
<td>39-39</td>
</tr>
<tr>
<td>Not interfere</td>
<td>44-34</td>
<td>19-58</td>
</tr>
<tr>
<td>Deep concerns</td>
<td>79-12</td>
<td>63-18</td>
</tr>
<tr>
<td>Some/make life easier</td>
<td>54-23</td>
<td>34-47</td>
</tr>
<tr>
<td>Some/more tech jobs</td>
<td>65-19</td>
<td>41-36</td>
</tr>
<tr>
<td>Not concerned</td>
<td>45-27</td>
<td>26-44</td>
</tr>
</tbody>
</table>
Below are examples of current services that some technology companies provide that could be impacted if the proposed new laws to increase competition against big tech companies were passed. Would you be more likely to SUPPORT or OPPOSE the new laws to increase competition against big tech companies if each one of these things happened or would it have no impact either way?

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Much More Likely to Support</th>
<th>Somewhat More Likely to Support</th>
<th>Somewhat More Likely to Oppose</th>
<th>Much More Likely to Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon restricted from providing free shipping on Amazon Prime products</td>
<td>7</td>
<td>10</td>
<td>22</td>
<td>36</td>
</tr>
<tr>
<td>Amazon restricted from selling Amazon Basics products, such as office supplies, clothing, and other everyday items</td>
<td>9</td>
<td>10</td>
<td>24</td>
<td>26</td>
</tr>
<tr>
<td>Google restricted from showing Google Maps in Google search results for local businesses or other locations</td>
<td>7</td>
<td>13</td>
<td>22</td>
<td>26</td>
</tr>
</tbody>
</table>

Hearing that these laws could interfere with Amazon Prime and Amazon Basics is a serious deterrent.
Learning about impacts turns voters against the bills making it clear that they would hurt people like them.

If these new laws to increase competition against big tech companies were to pass, do you think that it would HELP people like you...?

Looking at it a different way, if these new laws to increase competition against big tech companies were to pass, do you think that it would HURT consumers like you...?
Which Tech Proposals Garner More Support?
Voters support action on cybersecurity and privacy over tech competition.

What issue in the technology industry do you think is most important for Congress to focus on?

- Cybersecurity and stopping hacking: 35
- Protecting data privacy for consumers: 22
- Stopping COVID misinformation online: 11
- Violent extremists online: 8
- Training to build a technology workforce: 6
- Building more high-speed internet access: 6
- Stopping anti-competitive practices: 6
- None of these: 6
Perhaps that is why other proposals are far more popular than these new laws.

Below are some different proposals for Congress to focus on regarding big technology companies. Please indicate how much you support or oppose each one of these proposals.

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Strongly favor</th>
<th>Somewhat favor</th>
<th>Somewhat oppose</th>
<th>Strongly oppose</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helping businesses deal with cyber-attacks demanding ransoms</td>
<td>51</td>
<td>37</td>
<td>4</td>
<td>2</td>
<td>88</td>
</tr>
<tr>
<td>Set national standards for consumer privacy and security online</td>
<td>49</td>
<td>36</td>
<td>6</td>
<td>2</td>
<td>86</td>
</tr>
<tr>
<td>Prohibit Internet companies from using consumers’ data to discriminate against consumers on the basis of race or gender</td>
<td>54</td>
<td>28</td>
<td>5</td>
<td>4</td>
<td>83</td>
</tr>
<tr>
<td>Investing more resources into expanded broadband access in rural and underserved communities</td>
<td>41</td>
<td>38</td>
<td>8</td>
<td>4</td>
<td>78</td>
</tr>
<tr>
<td>Set national standards for data use practices by Internet companies</td>
<td>34</td>
<td>44</td>
<td>7</td>
<td>4</td>
<td>76</td>
</tr>
<tr>
<td>Conduct national research into how to protect the health and safety of children on social media</td>
<td>41</td>
<td>34</td>
<td>9</td>
<td>5</td>
<td>69</td>
</tr>
<tr>
<td>Create a new division of the Federal Trade Commission to enforce privacy and security violations</td>
<td>34</td>
<td>38</td>
<td>11</td>
<td>7</td>
<td>68</td>
</tr>
<tr>
<td>Requiring social media platforms to make it easier to transfer your personal data from one service to another</td>
<td>15</td>
<td>24</td>
<td>16</td>
<td>18</td>
<td>37</td>
</tr>
<tr>
<td>Favor/Oppose proposed new laws to increase competition among big tech companies – Informed</td>
<td>13</td>
<td>29</td>
<td>24</td>
<td>12</td>
<td>40</td>
</tr>
</tbody>
</table>
When it comes specifically to Facebook, most battleground voters have heard something (62%) about Facebook and misinformation. Most of them do not think Facebook should be the only target of any new tech laws.

**How much have you read or heard about stories about Facebook and its handling of misinformation, user safety, and teen body image issues?**

- **A lot**: 66%
- **Some**: 34%
- **Not much**: 24%
- **Nothing at all**: 11%
- **3%

The government should pass new laws to protect people online and address a broad range of issues like privacy, security, and online content but should not focus on Facebook.

The government should pass new laws to change how Facebook operates.