Survey of National Voters
Methodology

• This presentation displays the results of an online survey among 1,200 registered voters in the United States.

• The survey was conducted from February 24 - March 6, 2022.

• In 95 cases out of 100, the responses to this survey should fall within ±2.8% of those that would have been obtained from interviewing the entire population of registered voters in the United States. The sampling error for subgroups of the survey will be greater.

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

- Most Democrats and Independents have some concerns about tech, and 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**.

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

53 Female
47 Male

32 Age 18-44
32 Age 45-59
36 Age 60 or older

76 White
10 Black
9 Hispanic
3 AAPI

54 Income <$60k
46 Income $60k+

83 Non-Union HH
17 Union HH

61 No degree
39 College grad

46 Rural
23 Suburban
21 Urban

47 Biden
45 Trump
1 Other
7 Did not vote

38 Republican
26 Independent
36 Democrat
Tech regulation is not a priority for voters. Economic concerns are top of mind.

What are the TWO issues that you want your U.S. Senator to make a priority?

- Strengthening the national economy: 38
- Controlling inflation: 37
- Protecting our borders: 27
- Dealing with COVID and public health: 24
- Cutting taxes: 19
- Cutting prescription prices: 12
- Building and repairing roads and bridges: 12
- Improving public schools: 10
- Creating more clean energy: 10
- Stopping online censorship: 5
- Regulating technology companies: 5
Even when compared with other, specific regulatory actions the Senate could take, passing antitrust legislation does not stack up.

Please mark the top THREE proposals you would like to see your U.S. Senator act on

- Allowing Medicare to negotiate with pharmaceutical companies to get lower prices: 50
- Banning Members of Congress from trading stocks to prevent insider trading: 38
- Spending $3.5 trillion on social programs like childcare, education, family tax breaks, and expanding Medicare for seniors: 37
- Spending $1 trillion to improve roads, bridges, broadband, and on other infrastructure projects: 34
- Imposing taxes known as tariffs on some goods that are made in other countries and imported to the United States: 33
- Allowing undocumented immigrants who were brought to the U.S. as children to remain in the United States and eventually apply for citizenship: 22
- Funding for 12 weeks of paid parental leave, covering lost income during time off following the birth or adoption of a child: 20
- Passing new laws to increase competition against big technology companies: 19
- Legalizing marijuana for recreational use: 19
When we force voters to focus just on technology policy, voters far and away prefer their Senator to focus on cybersecurity and privacy rather than stopping anti-competitive practices.

What issue in the technology industry do you think is most important for the U.S. Senate to focus on?

- Cybersecurity and stopping hacking: 30
- Protecting data privacy for consumers: 18
- Combating violent extremists online: 10
- Stopping COVID misinformation online: 10
- Stopping anti-competitive practices: 7
- Building more high-speed internet access: 6
- Training to build a technology workforce: 6
- Creating high paying tech jobs: 5
- Changing smartphone app store rules: 1
After assessing voter attitudes toward tech regulations, most voters (63%) aligned with the view that some government action on tech is needed, but not the full break up of big tech companies.

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: 63%
- The government should break up the power of big technology companies: 22%
- The government should not interfere with America’s technology sector: 15%
The Do Not Interfere segment and the Break Them Up Crowd are both decidedly hostile towards Democrats. Voters who fall into the camp who believes tech should be regulated responsibly, the majority of voters, tend to be winnable for Democrats.

**Not Interfere (15%)**
- 43% Female
- 40% Age 18-44
- 34% Age 45-59
- 27% Age 60+
- 71% No degree
- 78% White
- 11% Black
- 12% Hispanic
- 1% Asian
- 24% Dem, 23% Ind, 53% GOP
- 36% Biden Approval

**Responsibly (63%)**
- 58% Female
- 28% Age 18-44
- 34% Age 45-59
- 38% Age 60+
- 59% No degree
- 76% White
- 11% Black
- 8% Hispanic
- 4% Asian
- 42% Dem, 25% Ind, 33% GOP
- 47% Biden Approval

**Break Up (22%)**
- 45% Female
- 38% Age 18-44
- 34% Age 45-59
- 37% Age 60+
- 61% No degree
- 75% White
- 9% Black
- 9% Hispanic
- 3% Asian
- 30% Dem, 28% Ind, 41% GOP
- 36% Biden Approval
Most voters (89%) have at least some concern about tech companies, but only 24% want aggressive government intervention. Most voters have concerns, but value the convenience (37%) or the economic possibilities (28%) that stem from tech.

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
- I have deep concerns about how technology companies operate, and want the government to act aggressively to address their negative impacts
- I have some concerns about technology companies operate, but I would still like to see more technology jobs and opportunities in my community
- I do not really have any concerns about how technology companies operate
That large group in the middle contains convenience voters (37%) and job-driven voters (28%). Convenience voters are more likely to be women and Democrats while voters who value the jobs are more likely to live in urban areas and skew Republican. Both are good targets.

<table>
<thead>
<tr>
<th>Category</th>
<th>Female</th>
<th>18-44</th>
<th>45-59</th>
<th>60+</th>
<th>Degree</th>
<th>Race</th>
<th>Rural</th>
<th>Suburban</th>
<th>Urban</th>
<th>Dem</th>
<th>Ind</th>
<th>GOP</th>
<th>Biden Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Concerns (11%)</td>
<td>52%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>44%</td>
<td>23%</td>
<td>33%</td>
<td>38%</td>
<td>21%</td>
<td>41%</td>
<td>40% Biden Approval</td>
</tr>
<tr>
<td>Some/Life Easier (37%)</td>
<td>57%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>41%</td>
<td>26%</td>
<td>32%</td>
<td>44% Biden Approval</td>
</tr>
<tr>
<td>Some/Tech Jobs (28%)</td>
<td>54%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>31%</td>
<td>29%</td>
<td>40%</td>
<td>43% Biden Approval</td>
</tr>
<tr>
<td>Deep Concerns (24%)</td>
<td>46%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>35%</td>
<td>23%</td>
<td>42%</td>
<td>42% Biden Approval</td>
</tr>
</tbody>
</table>

- 37% Age 18-44
- 30% Age 45-59
- 33% Age 60+
- 62% No degree
- 68% White
- 19% Black
- 12% Hispanic
- 1% Asian
- 48% Rural, 24% Suburban, 28% Urban
- 32% Age 18-44
- 32% Age 45-59
- 35% Age 60+
- 62% No degree
- 76% White
- 10% Black
- 9% Hispanic
- 3% Asian
- 48% Rural, 24% Suburban, 28% Urban
- 32% Age 18-44
- 38% Age 45-59
- 21% Age 60+
- 62% No degree
- 76% White
- 12% Black
- 10% Hispanic
- 4% Asian
- 44% Rural, 20% Suburban, 36% Urban
- 32% Age 18-44
- 38% Age 45-59
- 21% Age 60+
- 62% No degree
- 73% White
- 12% Black
- 10% Hispanic
- 4% Asian
- 44% Rural, 20% Suburban, 36% Urban
- 28% Age 18-44
- 27% Age 45-59
- 45% Age 60+
- 54% No degree
- 83% White
- 5% Black
- 7% Hispanic
- 2% Asian
- 47% Rural, 24% Suburban, 28% Urban
- 28% Age 18-44
- 27% Age 45-9
- 45% Age 60+
- 54% No degree
- 83% White
- 5% Black
- 7% Hispanic
- 2% Asian
- 47% Rural, 24% Suburban, 28% Urban
- 35% Dem, 23% Ind, 42% GOP
- 35% Dem, 23% Ind, 42% GOP
- 42% Biden Approval
- 40% Biden Approval
- 42% Biden Approval
- 42% Biden Approval

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Few voters (36%) have heard anything about potential new tech laws. Those who have are more likely to be higher income, men, younger, better educated, and live in urban areas.
Hearing that these laws could interfere with tech jobs, Amazon Prime, and Apple’s safety verification are serious deterrents.

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 Provided</th>
<th>More Likely to Support</th>
<th>More Likely to Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legislation caused leading U.S. tech companies to eliminate American jobs</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Amazon restricted from providing free shipping on Amazon Prime products</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Amazon restricted from selling Amazon Basics products, such as office supplies, clothing, and other everyday items</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Google restricted from showing Google Maps in Google search results for local businesses or other locations</td>
<td>11</td>
<td>14</td>
</tr>
<tr>
<td>Apple prohibited from reviewing and verifying the safety of any app that is installed on iPhones</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Apple restricted from automatically pre-installing apps on iPhones, such as iMessage or Facetime</td>
<td>15</td>
<td>17</td>
</tr>
</tbody>
</table>
Voters believe these laws would not only **not** help them, but would actively hurt them and 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...?
We presented voters with arguments about restrictions on app stores from supporters and opponents of these potential new laws. They were balanced for time and overall content.

Another law under consideration would regulate the way that smartphone app stores work. Here is what some people are saying about new app store laws.

Proponents of new laws to regulate app stores say this legislation would give app developers more options for processing payments and distributing their apps.

Opponents say that the new app store legislation creates security risks by requiring smartphones to open up to insecure payment processors and apps that have not been vetted by the authorized app store.
The risks posed far outweigh the benefits for U.S. voters.

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

<table>
<thead>
<tr>
<th></th>
<th>Informed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Democrats</td>
<td>45-39</td>
</tr>
<tr>
<td>Independents</td>
<td>29-42</td>
</tr>
<tr>
<td>Republicans</td>
<td>33-48</td>
</tr>
<tr>
<td>Men</td>
<td>43-40</td>
</tr>
<tr>
<td>Women</td>
<td>31-46</td>
</tr>
<tr>
<td>18-44</td>
<td>57-31</td>
</tr>
<tr>
<td>45-59</td>
<td>33-47</td>
</tr>
<tr>
<td>60+</td>
<td>22-50</td>
</tr>
<tr>
<td>White</td>
<td>33-46</td>
</tr>
<tr>
<td>Voters of color</td>
<td>47-36</td>
</tr>
<tr>
<td>White/No degree</td>
<td>31-49</td>
</tr>
<tr>
<td>White/College grad</td>
<td>37-41</td>
</tr>
<tr>
<td>Biden Job Approval</td>
<td>48-35</td>
</tr>
<tr>
<td>Biden Job Disapproval</td>
<td>28-49</td>
</tr>
</tbody>
</table>
Other tech proposals are far more popular than these new laws. Independent voters particularly favor helping businesses counter cyber-attacks and setting standards for consumer privacy and security.

Below are some different proposals for the Senate to focus on regarding big technology companies. Please indicate how much you support or oppose each one of these proposals.
Voters trust device makers more than the government and app makers to keep their data safe.

**Which one of the following would you trust most to protect your personal data?**

- American digital device makers like Apple or Google: 40
- The US government: 36
- American app and software developers like Uber or Snapchat: 9
- American social media companies like Twitter or Instagram: 8
- Foreign social media companies like TikTok: 3
- Foreign digital device makers like Huawei or Xiaomi: 2
- Foreign governments: 2