Normington Petts

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

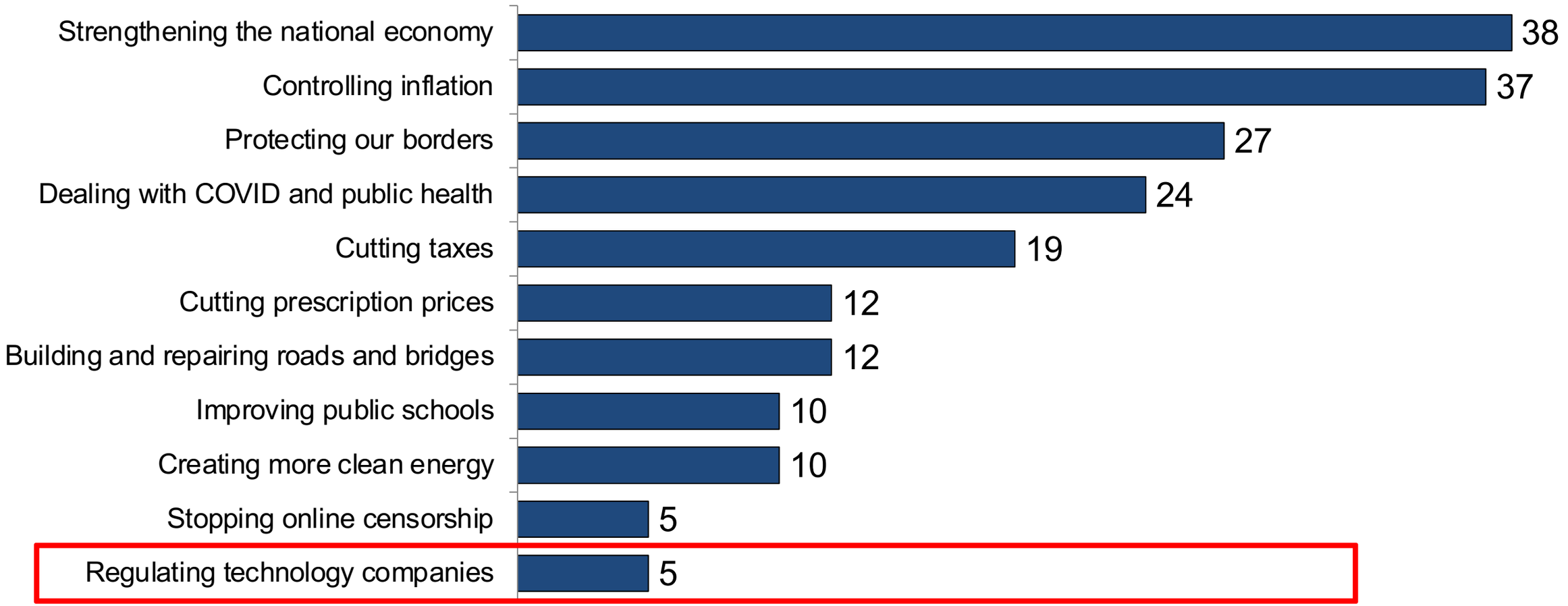
46 Rural
23 Suburban
21 Urban

47 Biden
45 Trump
1 Other
7 Did not vote

38 Republican
26 Independent
36 Democrat

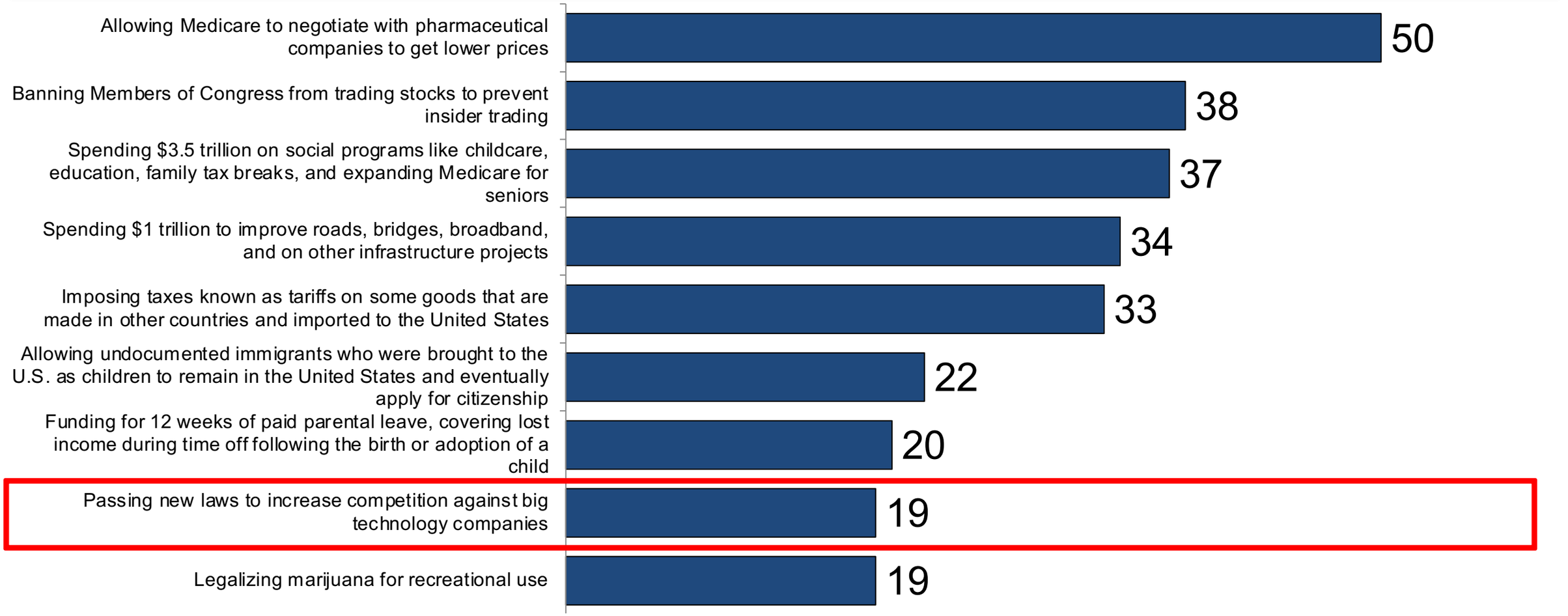
Tech regulation is not a priority for voters. Economic concerns are top of mind.

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



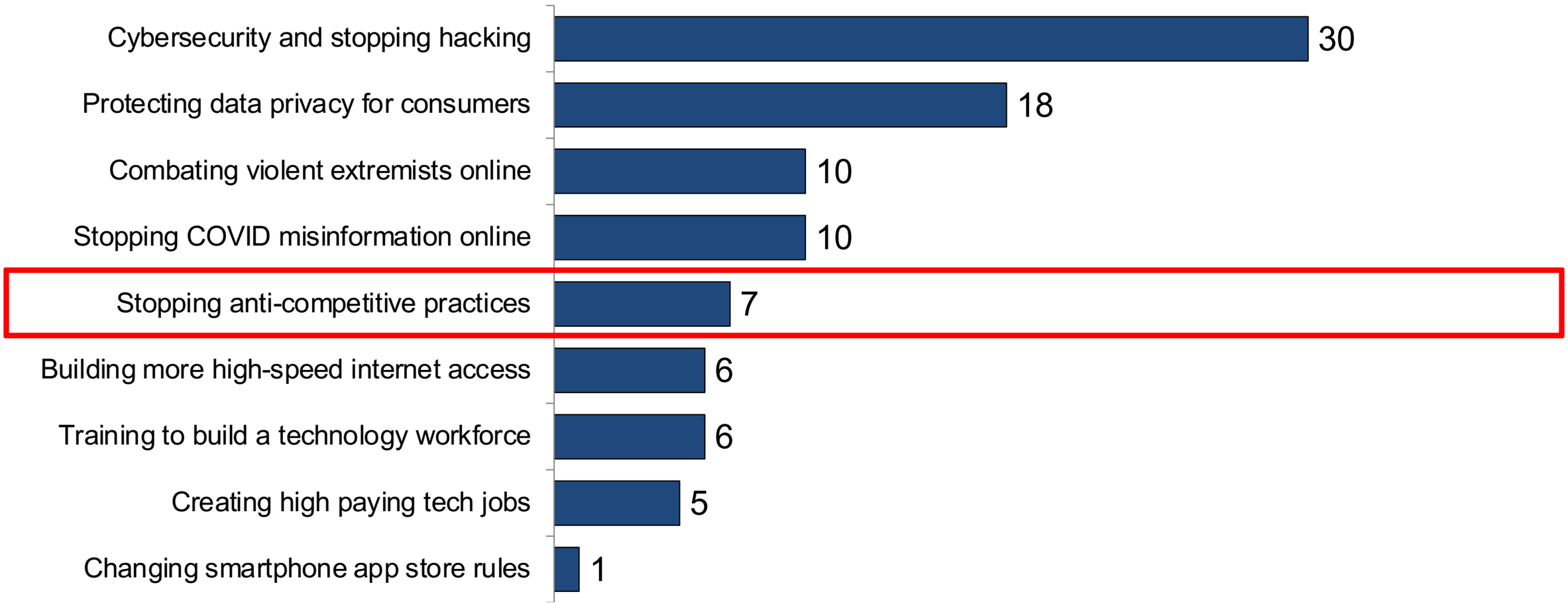
Even when compared with other, specific regulatory actions the Senate could take, passing antitrust legislation does not stack up.

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



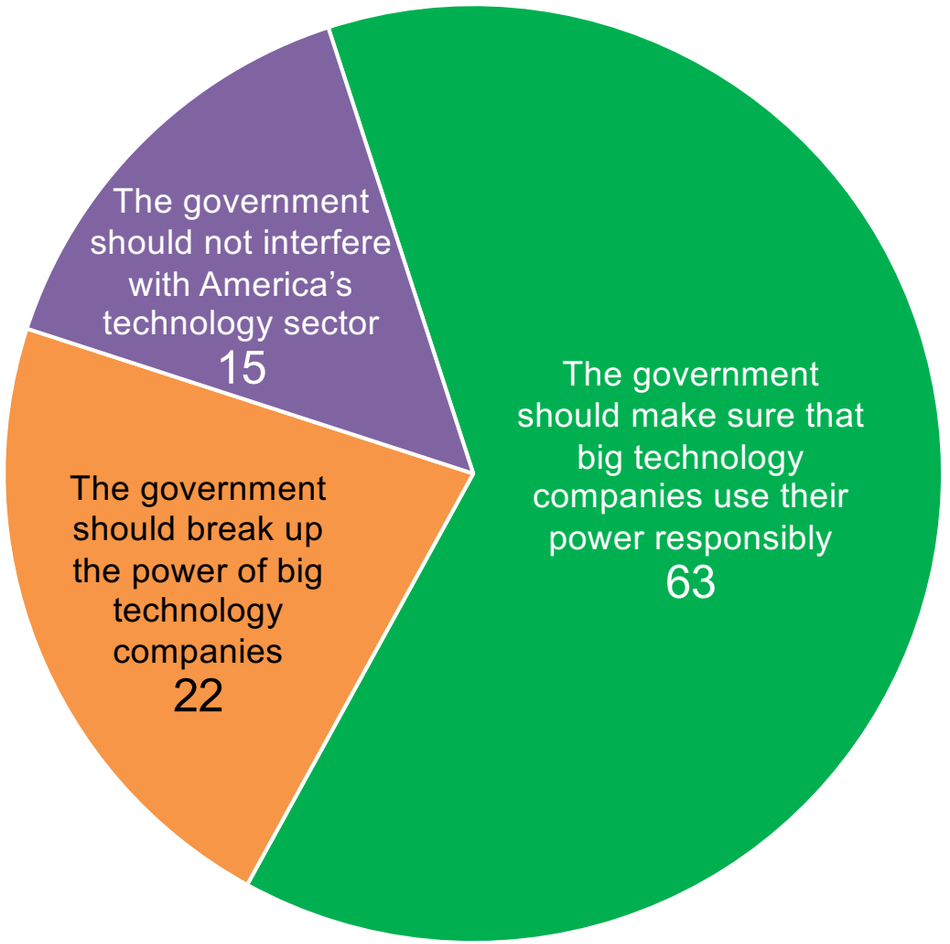
When we force voters to focus just on technology policy, voters far and away prefer their Senator to focus on cybersecurity and privacy rather than stopping anti-competitive practices.

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



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 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
25% Age 45-59
37% Age 60+

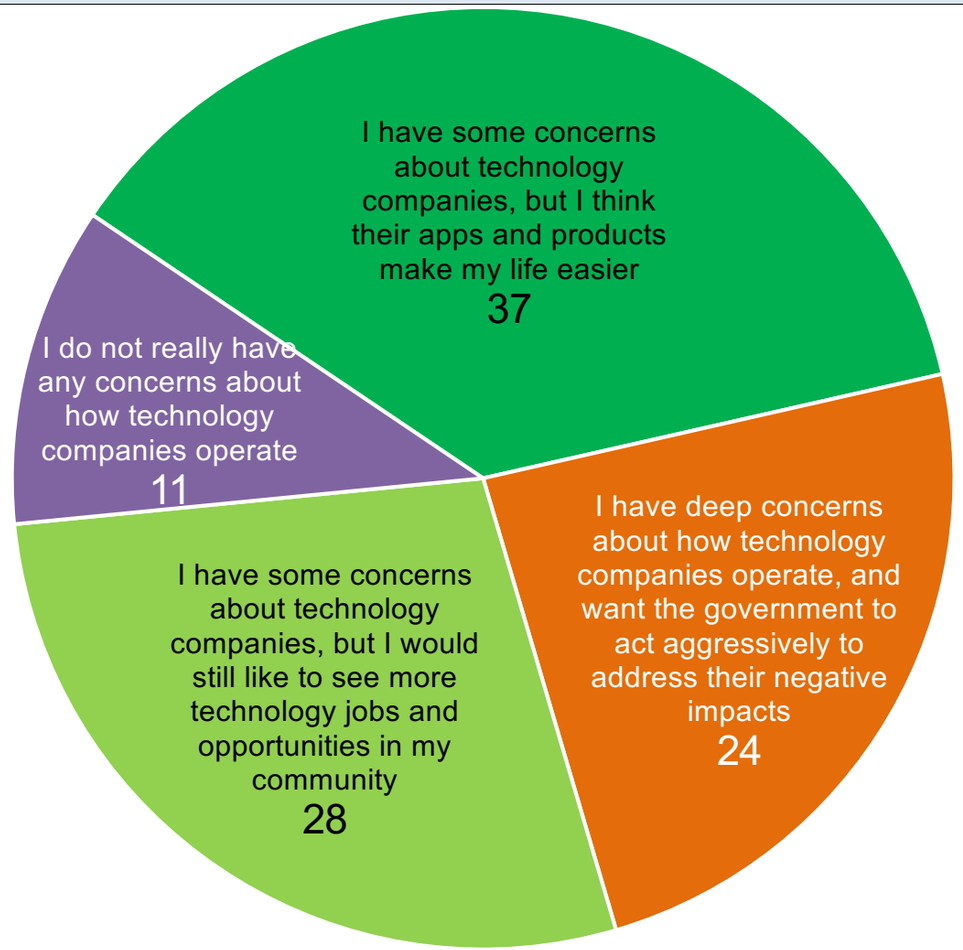
61% No degree

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?



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.

No Concerns (11%)
52% Female

37% Age 18-44
30% Age 45-59
33% Age 60+

78% No degree

68% White
19% Black
12% Hispanic
1% Asian

44% Rural, 23% Suburban, 33% Urban

38% Dem, 21% Ind, 41% GOP
40% Biden Approval

Some/Life Easier (37%)
57% Female

33% 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

41% Dem, 26% Ind, 32% GOP
44% Biden Approval

Some/Tech Jobs (28%)
54% Female

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

31% Dem, 29% Ind, 40% GOP
43% Biden Approval

Deep Concerns (24%)
46% Female

28% Age 18-44
27% Age 45-59
45% Age 60+

54% No degree

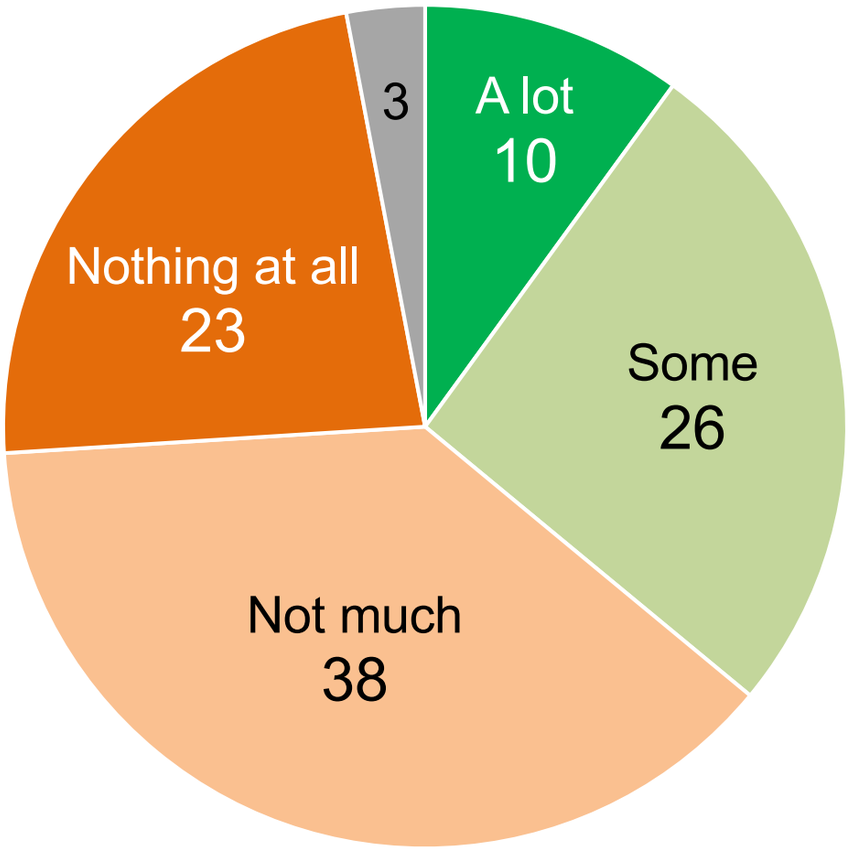
83% White
5% Black
7% Hispanic
2% Asian

47% Rural, 24% Suburban, 28% Urban

35% Dem, 23% Ind, 42% GOP
42% Biden Approval

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.

As you may know, the U.S. Senate is considering passing new laws to increase competition against big technology companies. First, how much have you heard about this?



36%
Heard

58% Male
54% $60,000+
47% College Grad
41% Age 18-44, 29% 45-59, 30% 60+

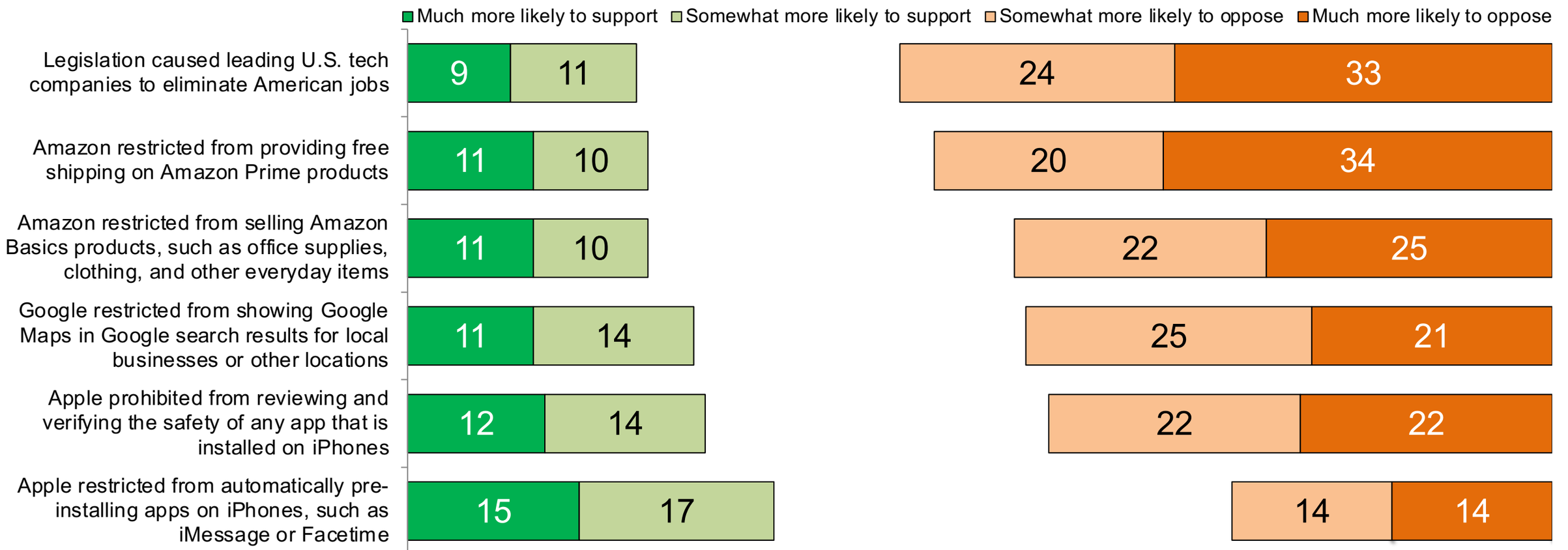
54% Biden Voters
55% Biden Approval

43% Dem, 22% Ind, 34% GOP

38% Rural, 23% Suburban, 39% Urban

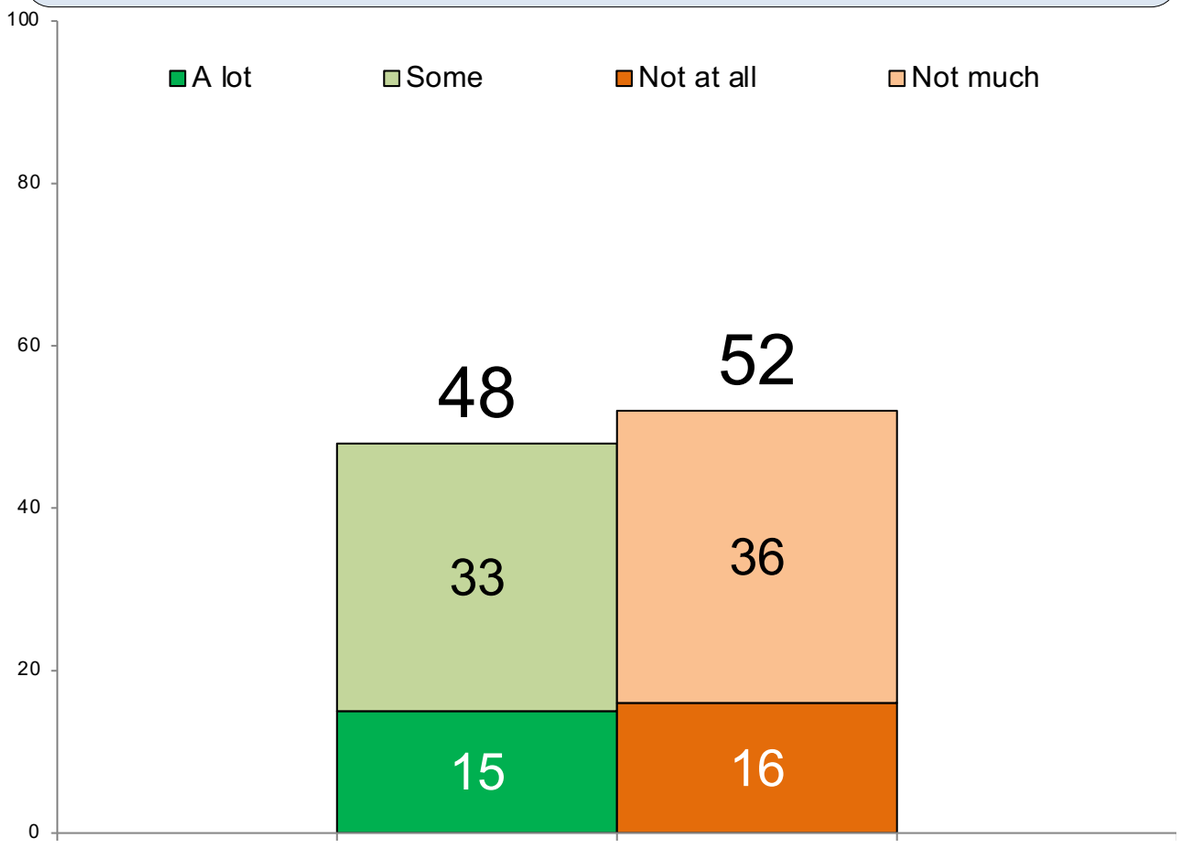
Hearing that these laws could interfere with tech jobs, Amazon Prime, and Apple's safety verification are serious deterrents.

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?

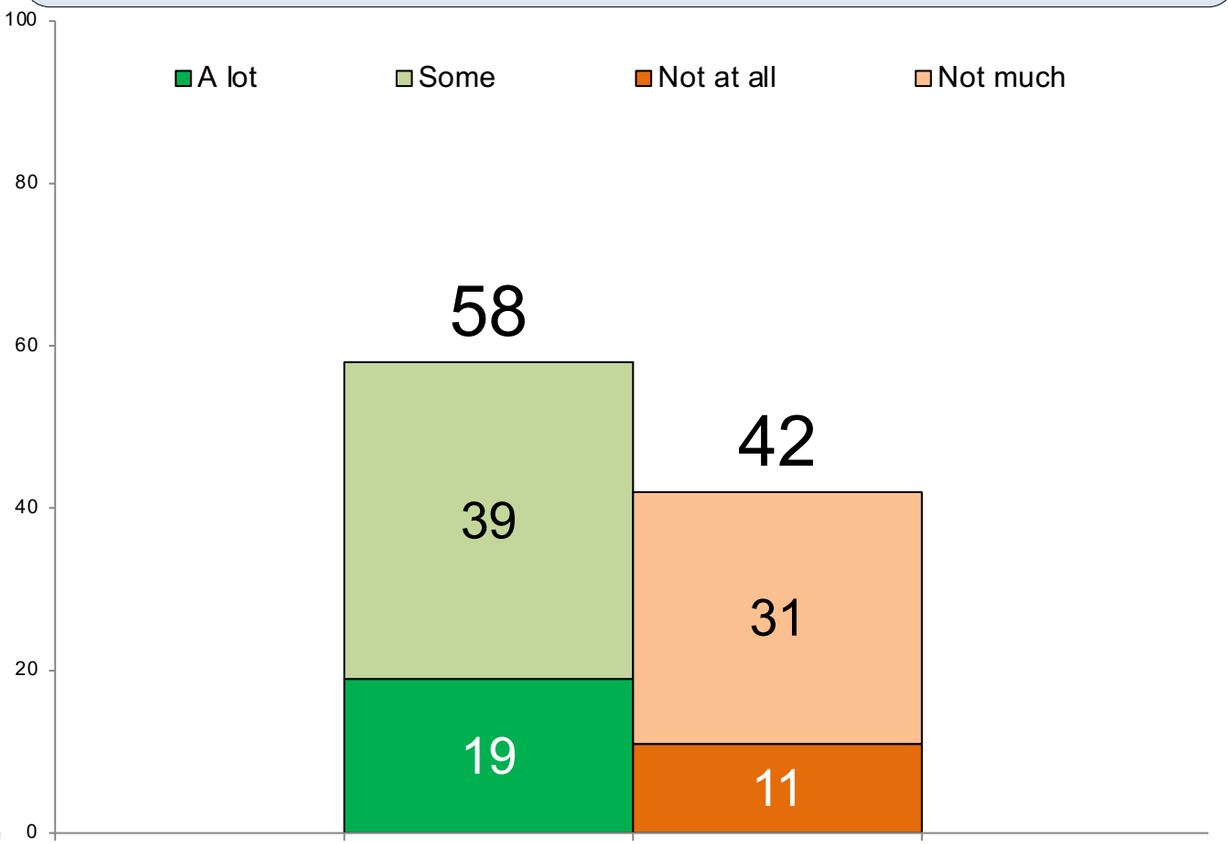


Voters believe these laws would not only **not** help them, but would actively hurt them and people like them.

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.

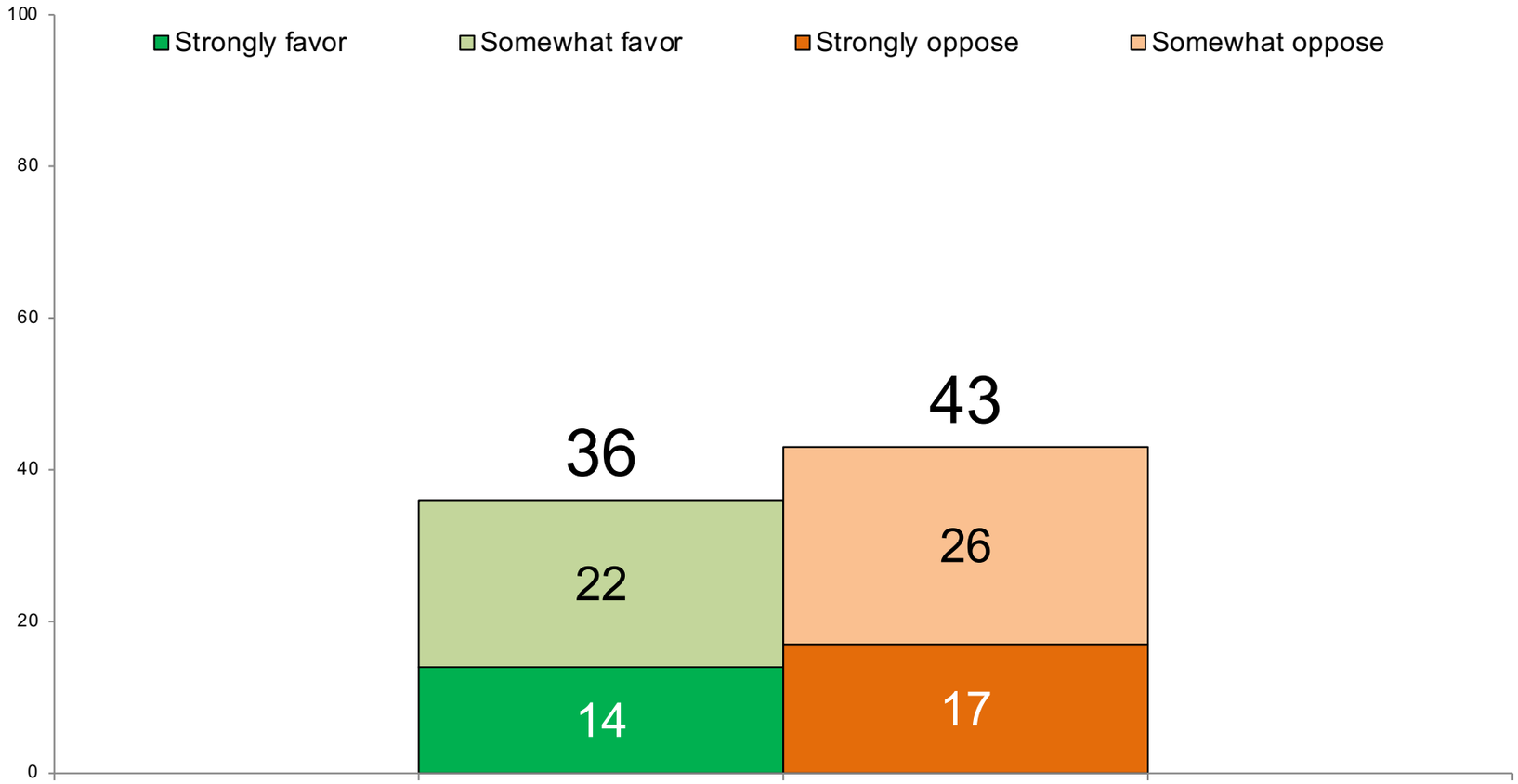
Another law under consideration would regulate the way that smartphone app stores work. Here is what some people are saying about new app store laws.

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.

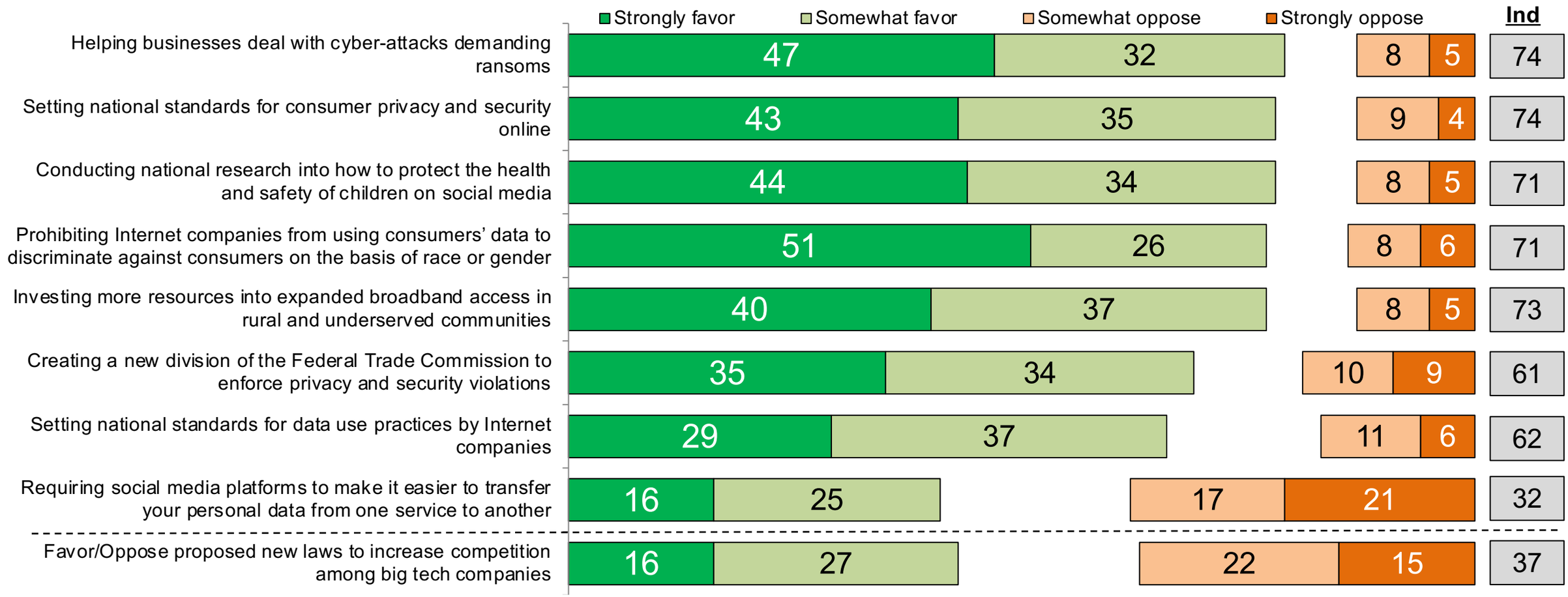
Having heard that, do you strongly favor, somewhat favor, somewhat oppose, or strongly oppose these proposed new App Store laws?

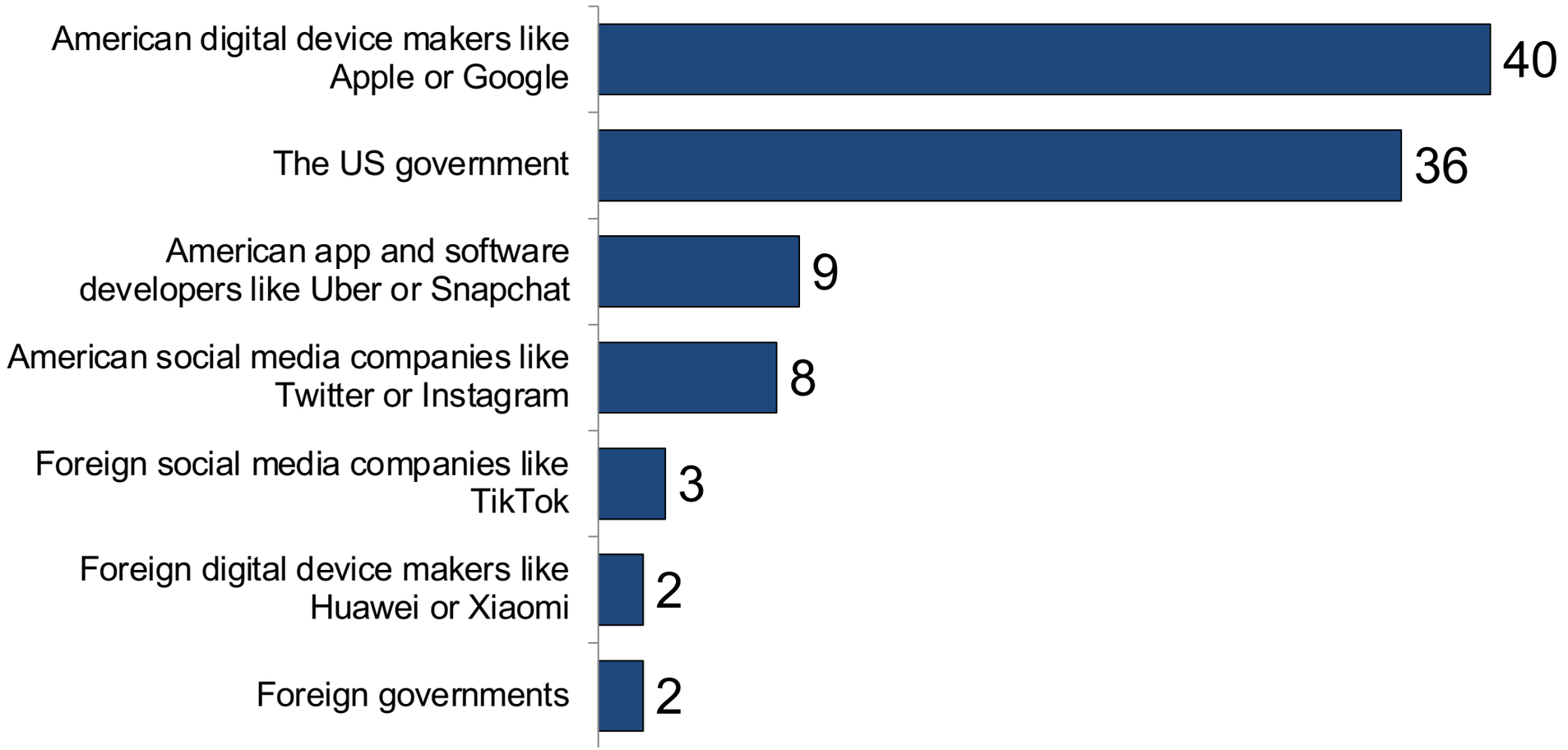


	Informed
Democrats	45-39
Independents	29-42
Republicans	33-48
Men	43-40
Women	31-46
18-44	57-31
45-59	33-47
60+	22-50
White	33-46
Voters of color	47-36
White/No degree	31-49
White/College grad	37-41
Biden Job Approval	48-35
Biden Job Disapproval	28-49

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?