

A large smartphone is shown on the left side of the image, tilted slightly. The screen displays a world map. The background of the entire image is a dark grid with various white icons representing business, technology, and data. In the top right corner, the Morning Consult logo is displayed in white.

MORNING CONSULT



**CHAMBER
OF PROGRESS**

VOTERS' SENTIMENT TOWARDS REGULATING AMAZON

Polling Presentation

MAY 2023

METHODOLOGY

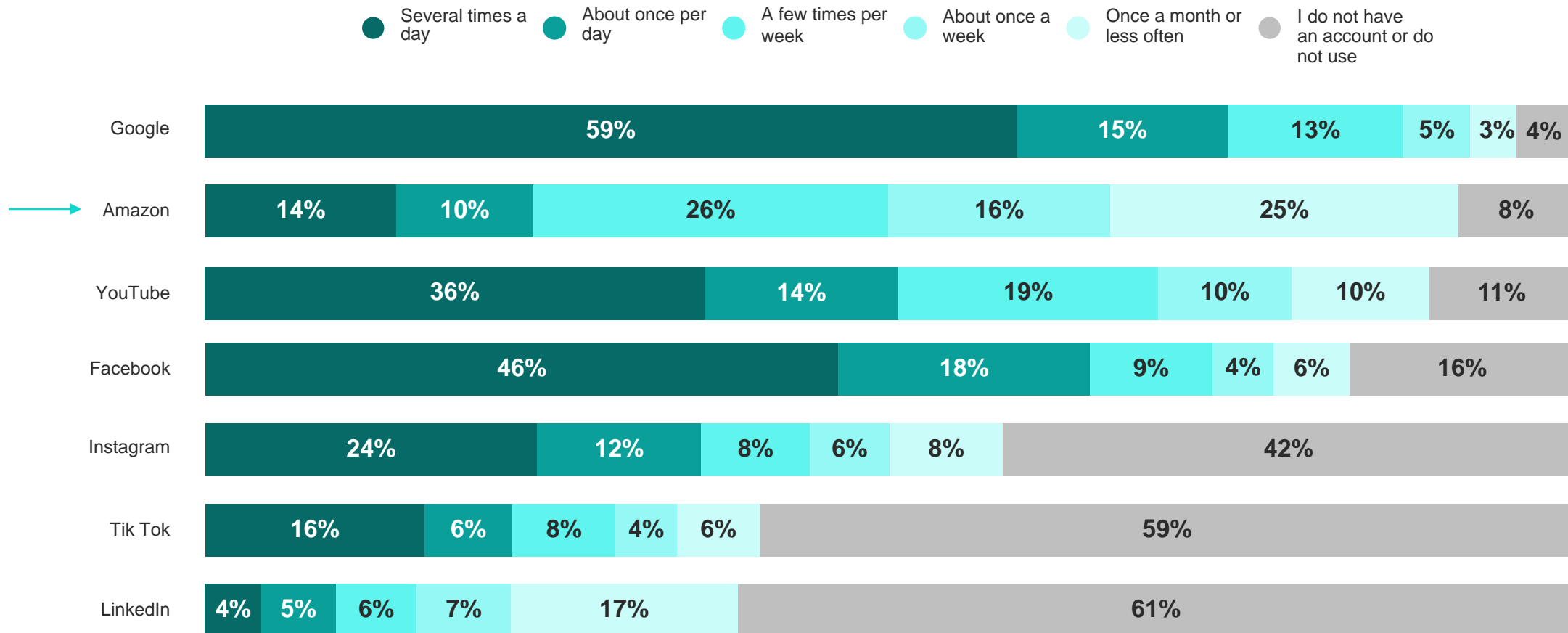
This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. Registered voters are referred to as voters throughout the analysis for simplicity. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.



AMAZON USAGE

Two-thirds (66%) of voters use Amazon at least on a weekly basis or more, including 24% who use Amazon on a daily basis.

How frequently, if at all, do you use the following online platforms or apps, if at all?



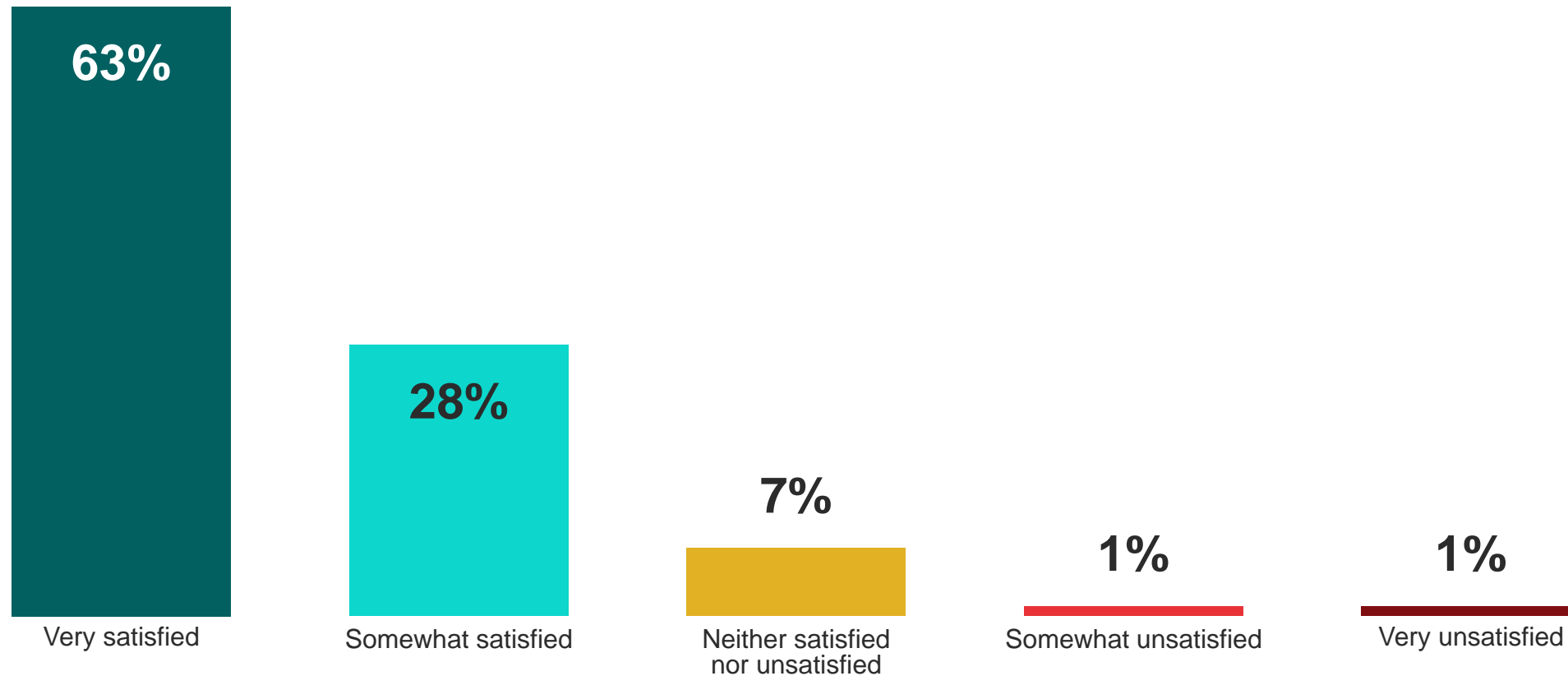
Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON USAGE

A strong majority (91%) of Amazon users are satisfied with their Amazon shopping experience, including 63% who are *very satisfied*.

Generally, how satisfied or unsatisfied are you with your Amazon shopping experience?

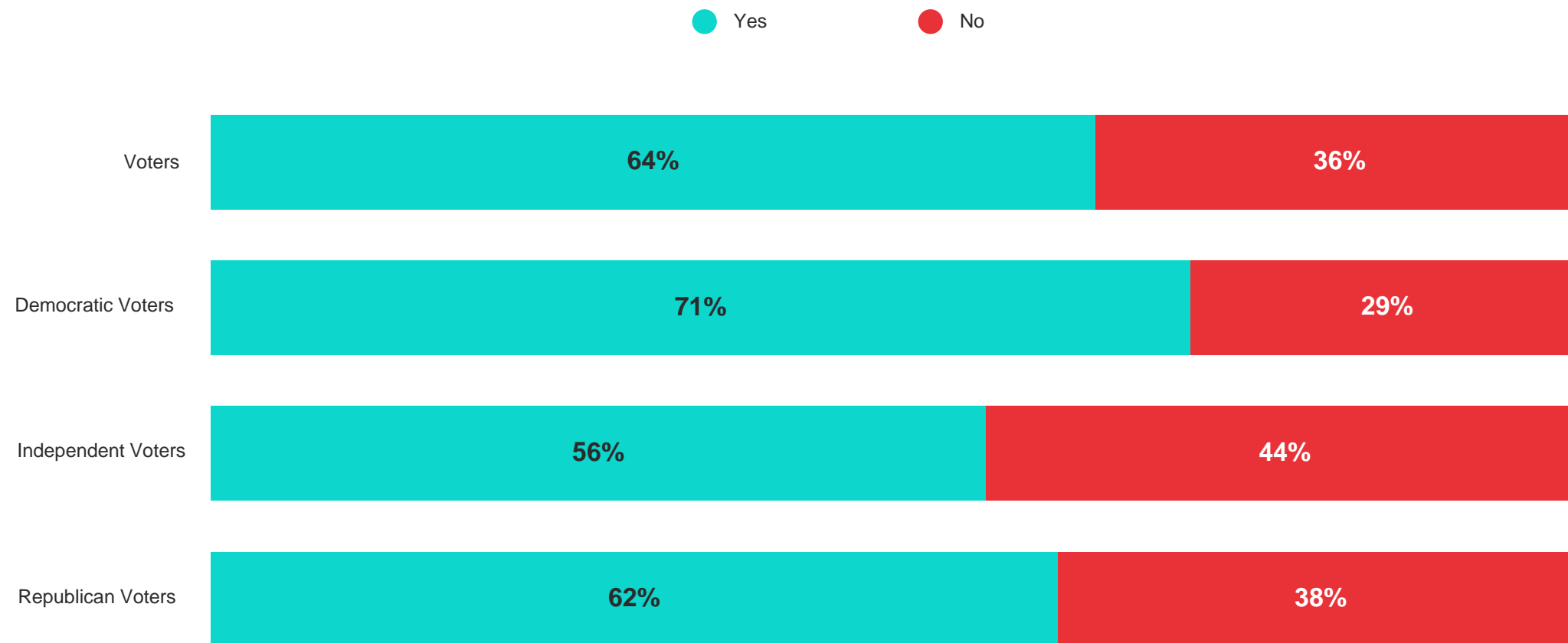
*AMAZON USERS, N=1,838 | *AMAZON USER = USE AMAZON AT LEAST ONCE A MONTH OR LESS OFTEN



AMAZON USAGE

Two-thirds (64%) of voters are currently an Amazon Prime member; and Democrats (71%) are more likely than Republicans (62%) to indicate they are Amazon Prime members.

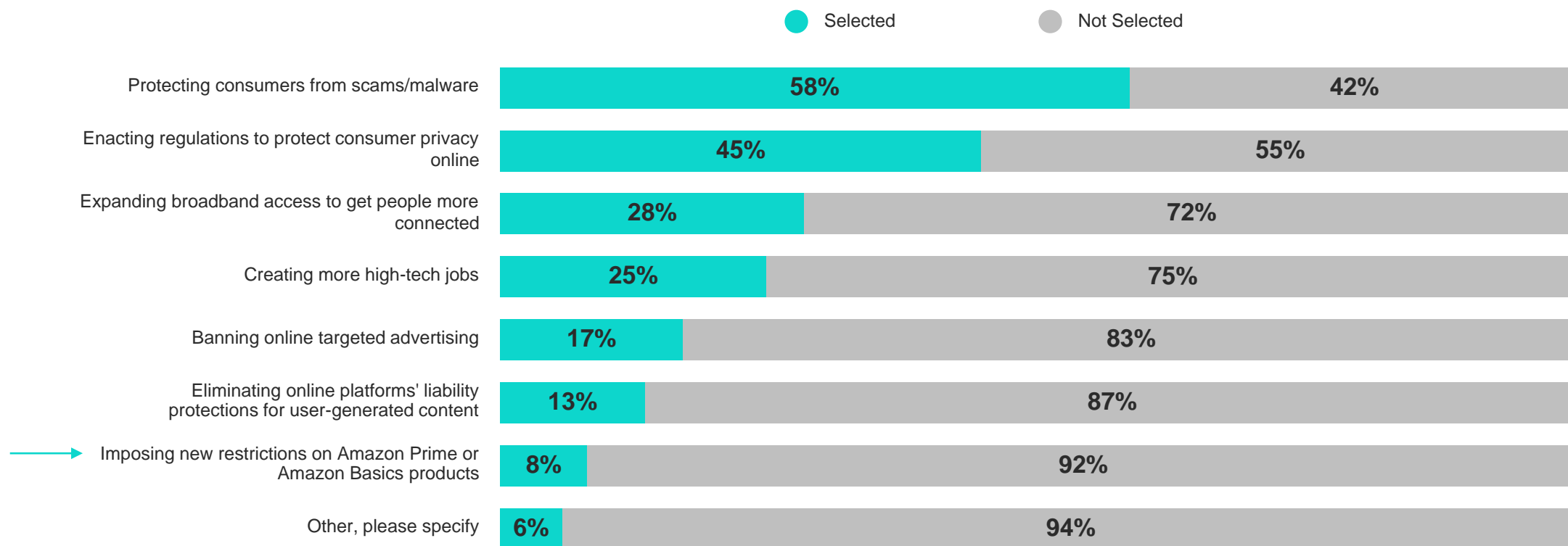
Are you currently an Amazon Prime member?



REGULATION PRIORITIES

Thinking about technology-related issues, a majority (58%) of voters want the Biden administration focusing on protecting consumers from scams/malware in 2023, while only 8% of voters selected imposing restrictions on Amazon Prime or Amazon Basics products as a priority.

Thinking about technology-related priorities, which TWO issues would you like to see the Biden administration focus on in 2023?



Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

REGULATION PRIORITIES

Across Democrats, independents, and Republican voters, imposing new restrictions on Amazon Prime and Amazon Basics products was least likely to be selected as a technology-related priority the Biden administration should focus on in 2023.

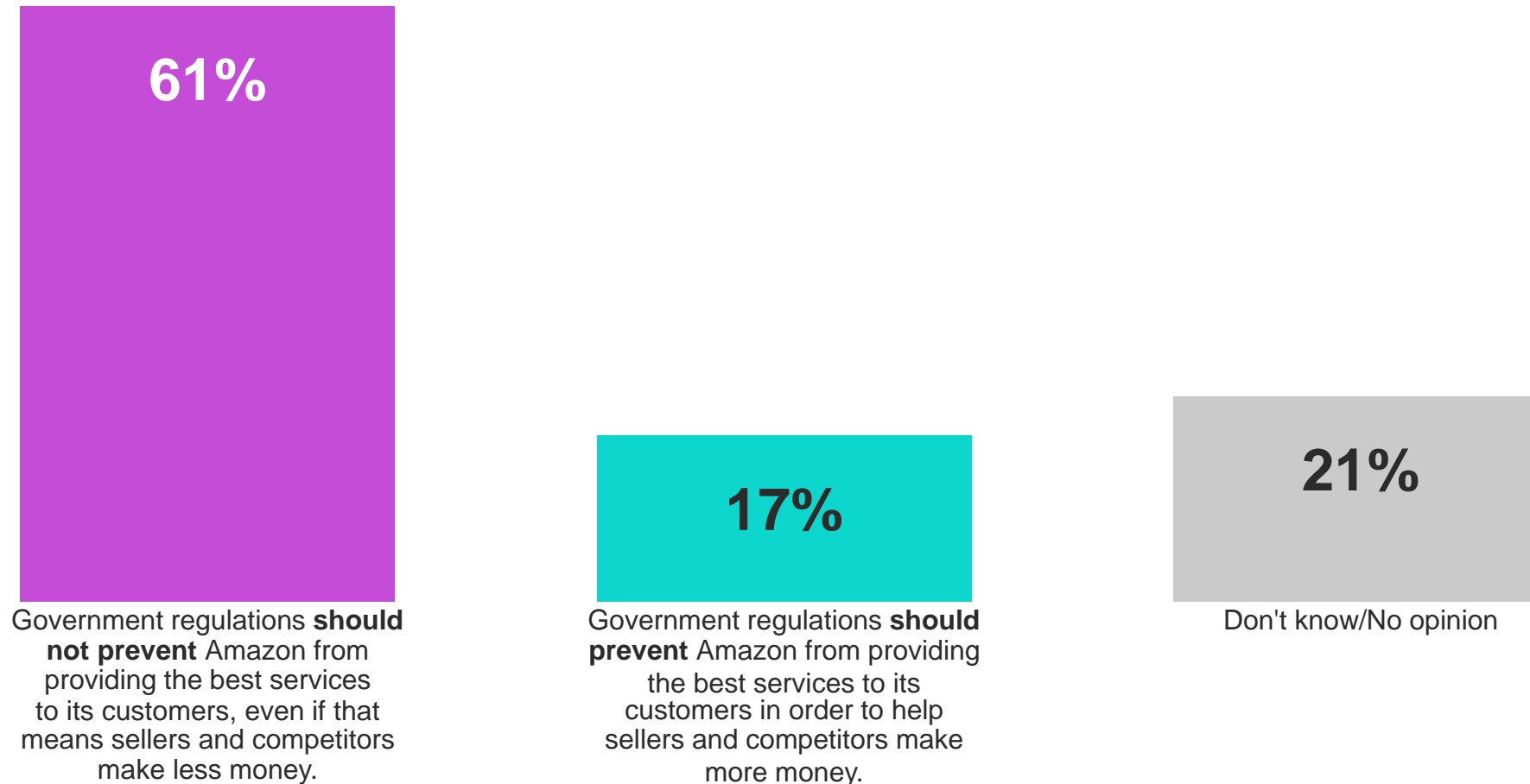
Thinking about technology-related priorities, which TWO issues would you like to see the Biden administration focus on in 2023?

| <i>% selected</i> | Voters | Democratic Voters | Independent Voters | Republican Voters |
|--|---------------|--------------------------|---------------------------|--------------------------|
| Enacting regulations to protect consumer privacy online | 58% | 56% | 61% | 60% |
| Protecting consumers from scams/malware | 45% | 45% | 46% | 44% |
| Expanding broadband access to get people more connected | 28% | 32% | 27% | 25% |
| Creating more high-tech jobs | 25% | 23% | 26% | 26% |
| Banning online targeted advertising | 17% | 15% | 17% | 19% |
| Eliminating online platforms' liability protections for user-generated content | 13% | 16% | 12% | 11% |
| → Imposing new restrictions on Amazon Prime or Amazon Basics products | 8% | 11% | 6% | 7% |
| Other, please specify | 6% | 3% | 6% | 9% |

REGULATION PRIORITIES

A majority (61%) of voters think government regulations should **not** prevent Amazon from providing the best services to its customers, even if that means sellers and competitors make less money.

Thinking about potential government regulation of Amazon, which of the following is closest to your opinion?



61%

Government regulations **should not prevent** Amazon from providing the best services to its customers, even if that means sellers and competitors make less money.

17%

Government regulations **should prevent** Amazon from providing the best services to its customers in order to help sellers and competitors make more money.

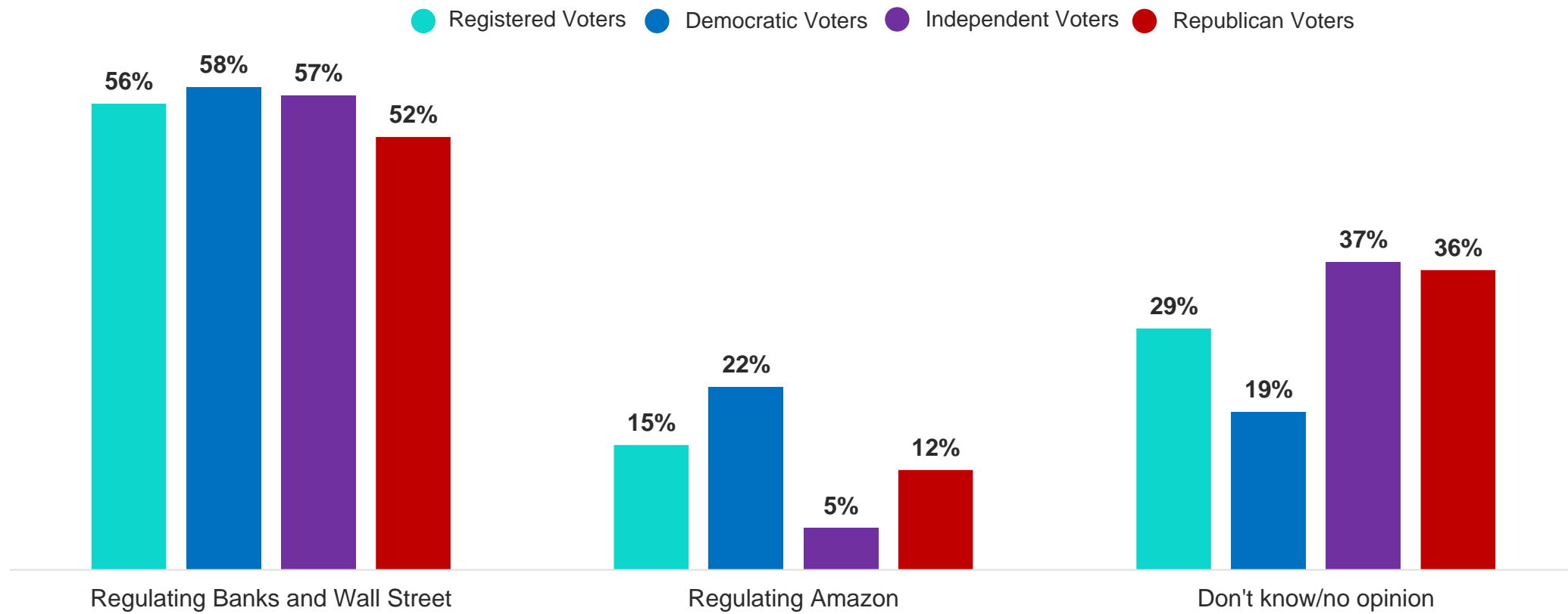
21%

Don't know/No opinion

REGULATION PRIORITIES

A bipartisan majority of voters think regulating banks and Wall Street should be a larger priority for the Biden Administration than regulating Amazon.

Of the following options, which should be a larger priority for the Biden Administration?



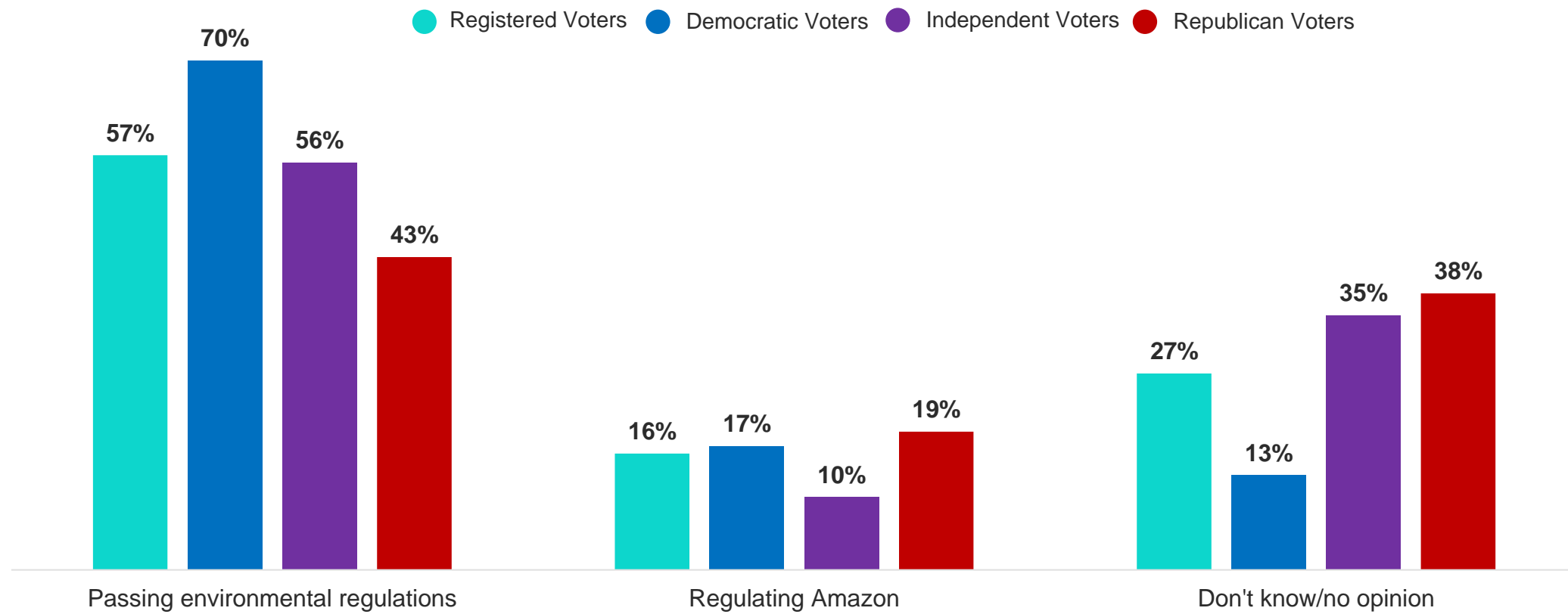
*Question was split sampled, n=668

Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

REGULATION PRIORITIES

A bipartisan majority of voters think passing environmental regulations should be a larger priority for the Biden Administration than regulating Amazon.

*Of the following options, which should be a larger priority for the Biden Administration?



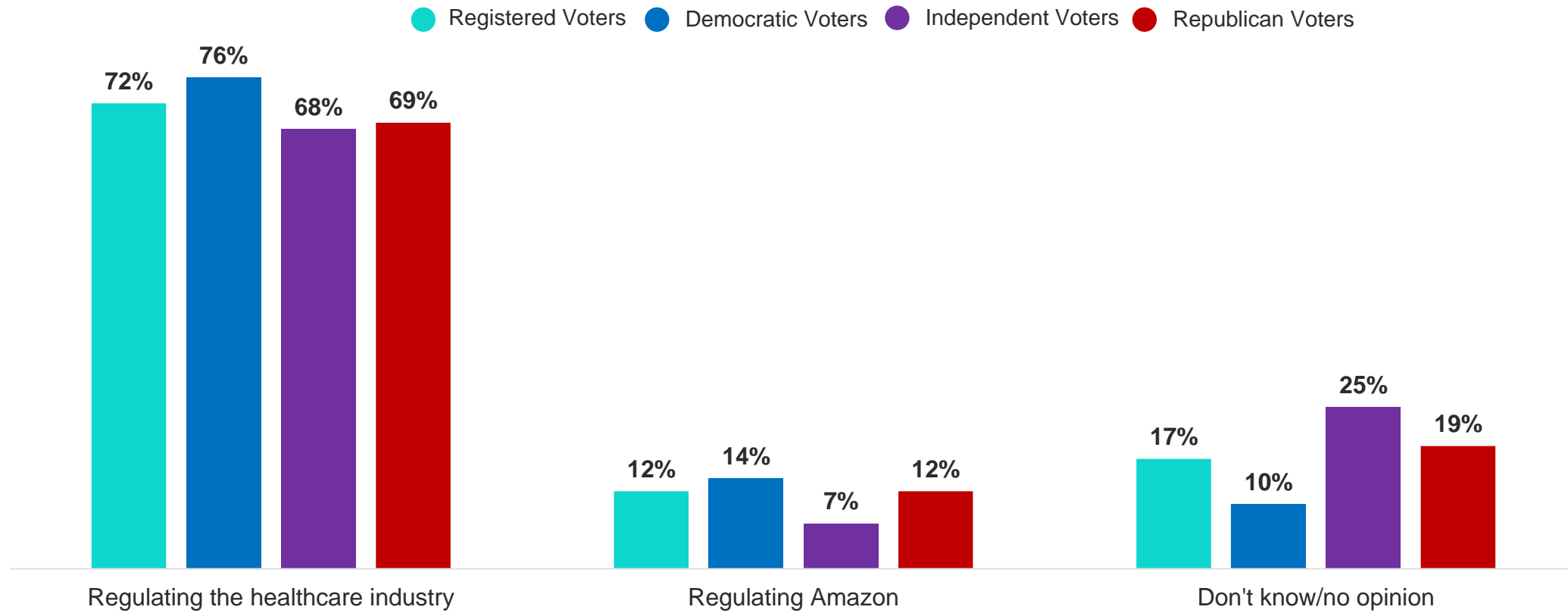
*Question was split sampled, n=622

Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

REGULATION PRIORITIES

A bipartisan majority of voters think regulating the healthcare industry should be a larger priority for the Biden Administration than regulating Amazon.

*Of the following options, which should be a larger priority for the Biden Administration?



*Question was split sampled, n=622

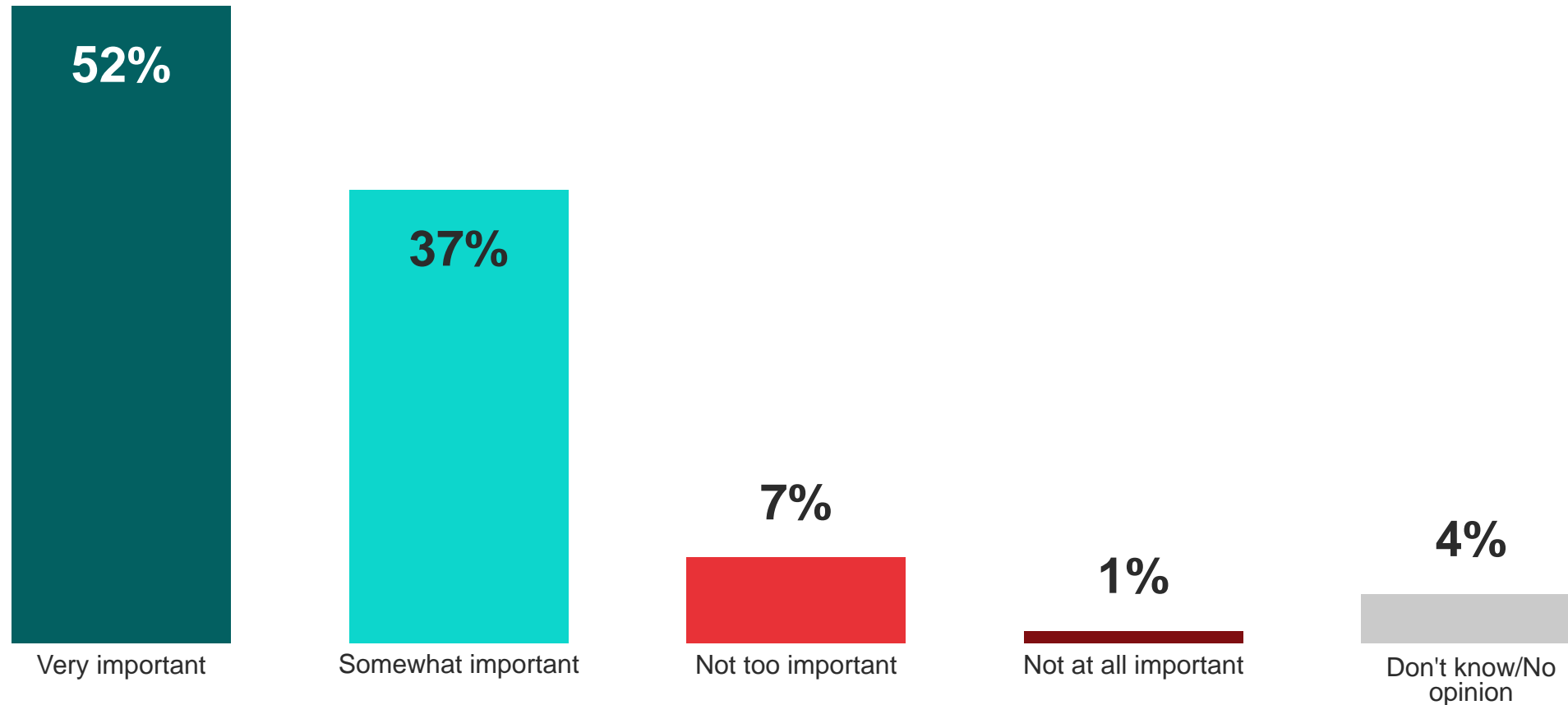
Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON BUY BOX

A majority (89%) of Amazon users say it is important to know they are receiving the best deal possible on the Internet when choosing to make a purchase on Amazon.

When choosing whether to make a purchase on Amazon, how important, if at all, is it to know that you are receiving the best deal possible on the Internet?

*AMAZON USERS, N=1,838 | *AMAZON USER = USE AMAZON AT LEAST ONCE A MONTH OR LESS OFTEN



Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

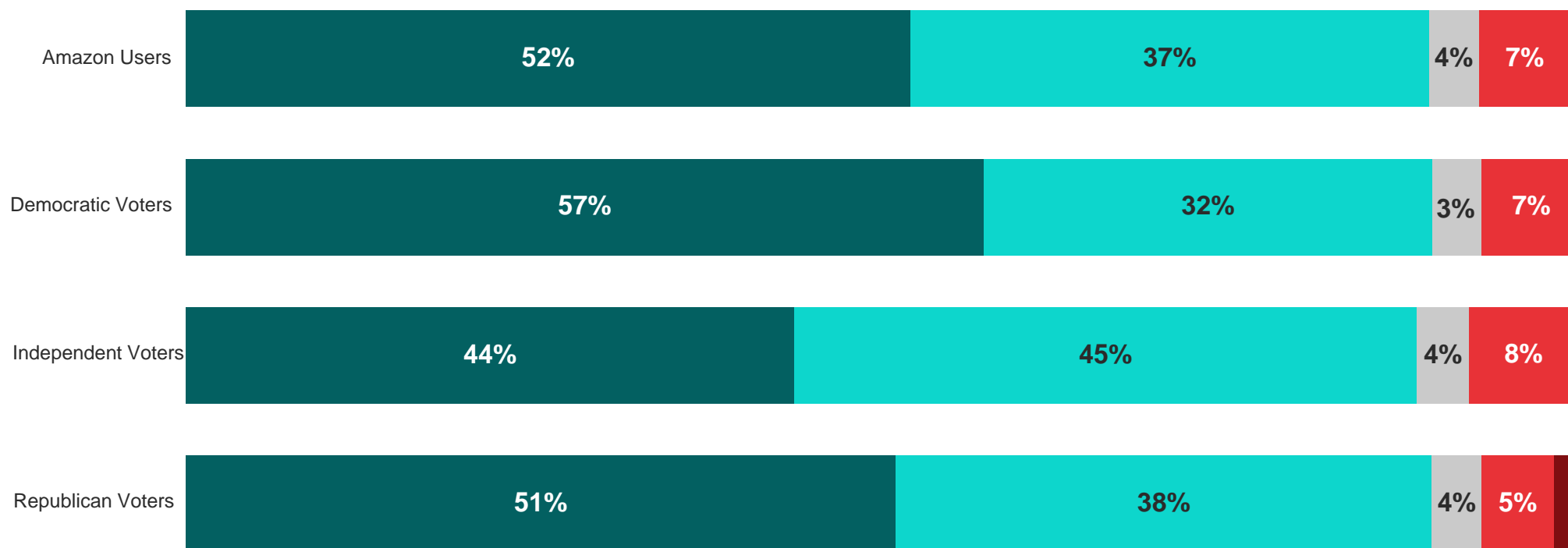
AMAZON BUY BOX

A bipartisan majority of Amazon users (Dem. 89%, Ind. 89%, Rep. 89%) say it is important to know they are receiving the best deal possible on the Internet when choosing to make a purchase on Amazon.

When choosing whether to make a purchase on Amazon, how important, if at all, is it to know that you are receiving the best deal possible on the Internet?

*AMAZON USERS, N=1,838 | *AMAZON USER = USE AMAZON AT LEAST ONCE A MONTH OR LESS OFTEN

Very important Somewhat important Don't know/No opinion Not too important Not at all important

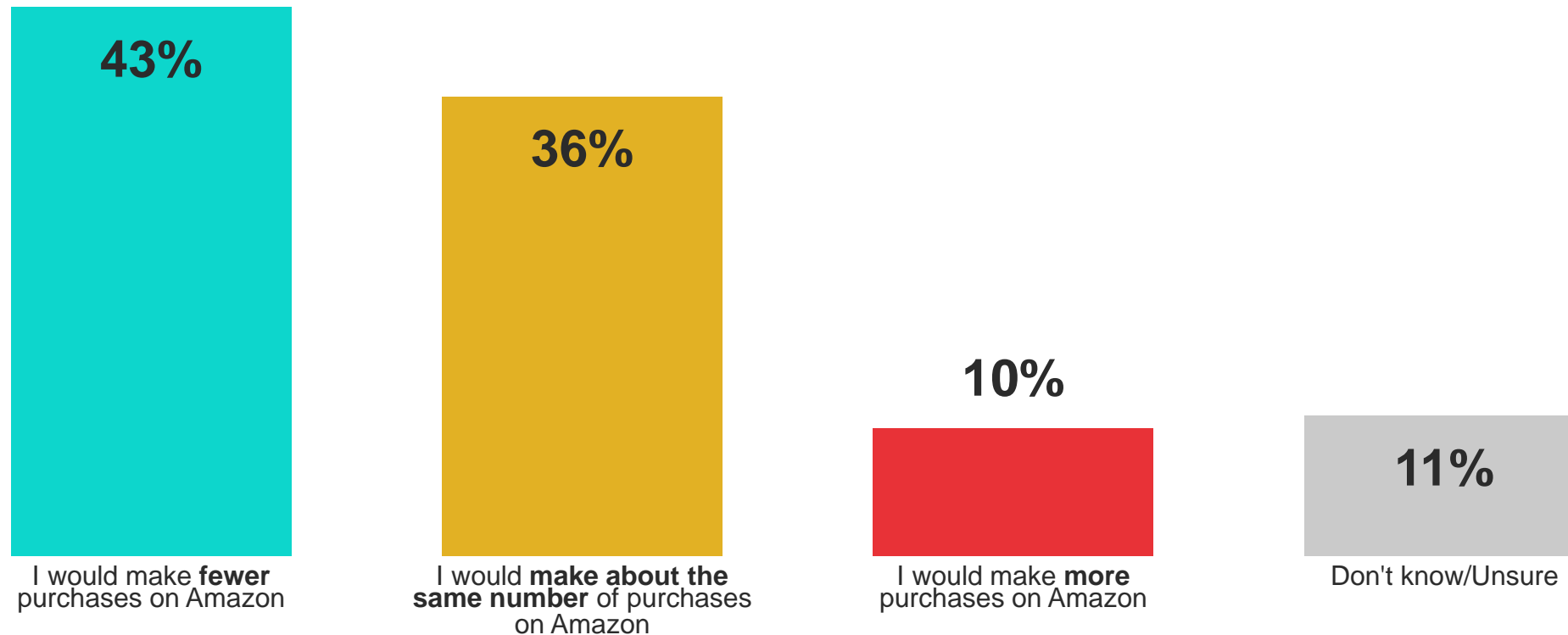


AMAZON BUY BOX

A plurality (43%) of Amazon users say they would make fewer purchases on Amazon if they learned products they purchased from Amazon were being sold somewhere else on the Internet for less, while 36% say it would not impact the number of purchases they make on Amazon.

If you learned that products you purchased on Amazon were being sold somewhere else on the Internet for less, how would you respond?

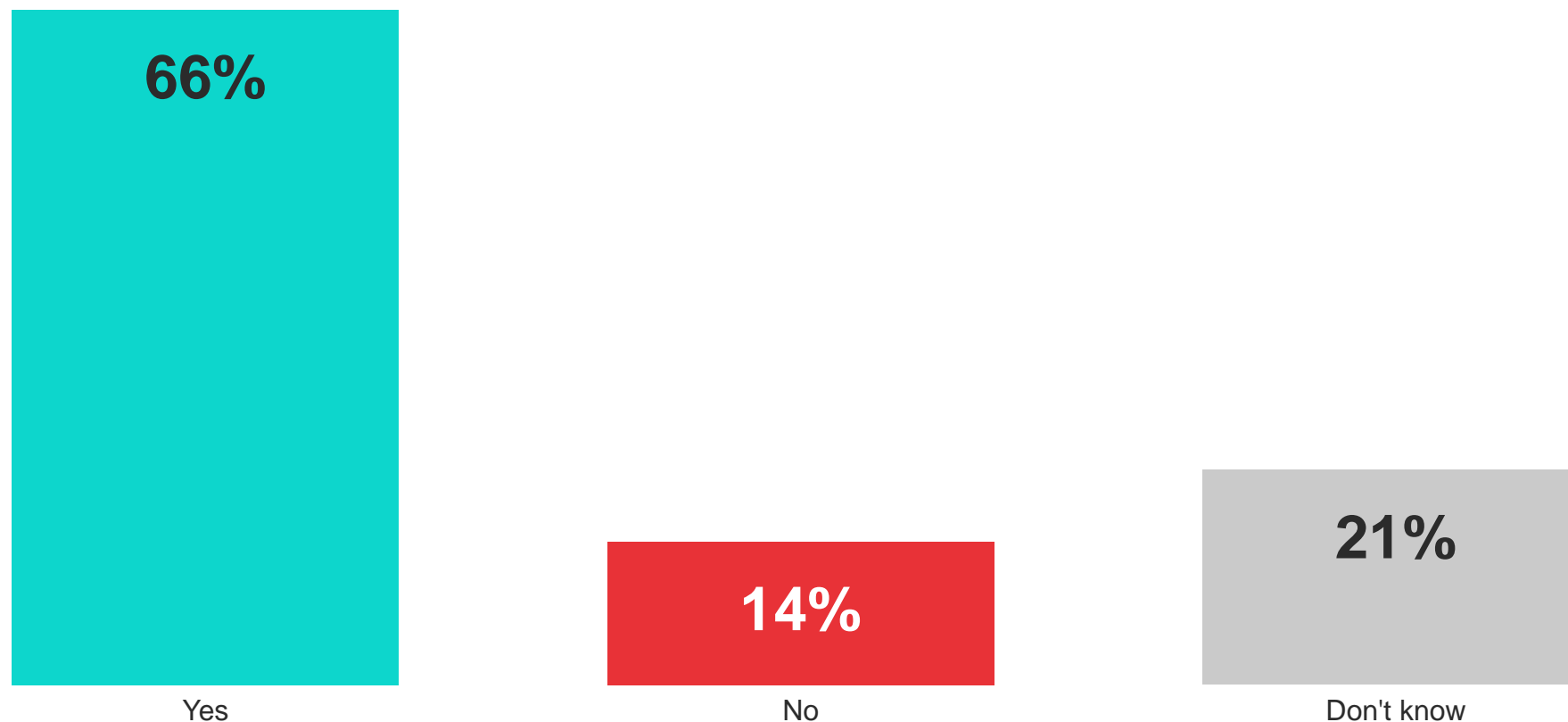
*AMAZON USERS, N=1,838 | *AMAZON USER = USE AMAZON AT LEAST ONCE A MONTH OR LESS OFTEN



AMAZON BUY BOX

After learning more, two-thirds (66%) of voters think Amazon should be able to feature the best deal possible in its search results even if it means all sellers are not promoted equally.

Some say Amazon should be allowed to feature the best deal possible in its search results for products, which may mean promoting certain sellers over others. Others say government regulations are needed to prevent Amazon from promoting certain sellers over others, regardless of which seller has the best deal possible. In your opinion, should Amazon be able to feature the best deal possible in its search results even if that means all sellers are not promoted equally?

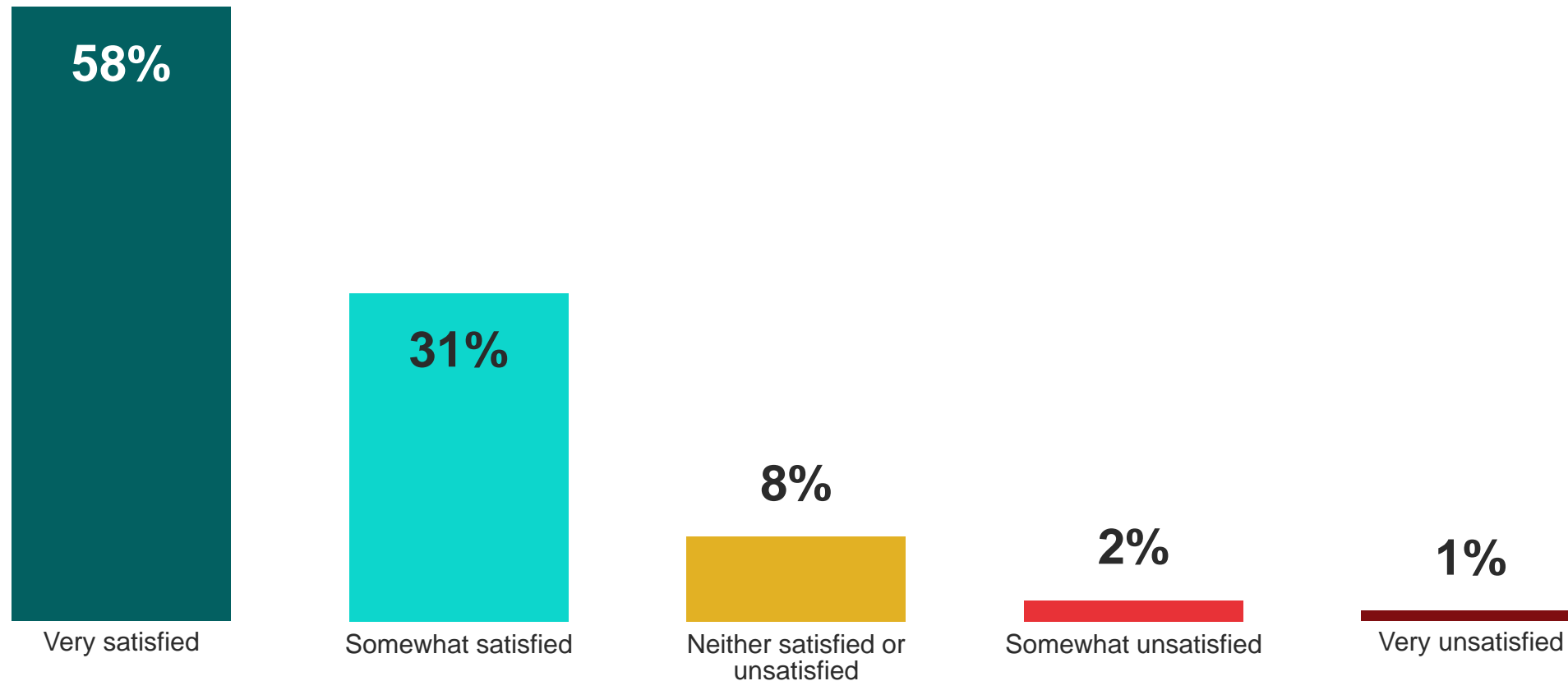


AMAZON PRIME

Nine-in-ten (89%) Amazon Prime members are satisfied with their membership, including 58% who are very satisfied.

How satisfied or unsatisfied are you with your Amazon Prime membership?

*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER



Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

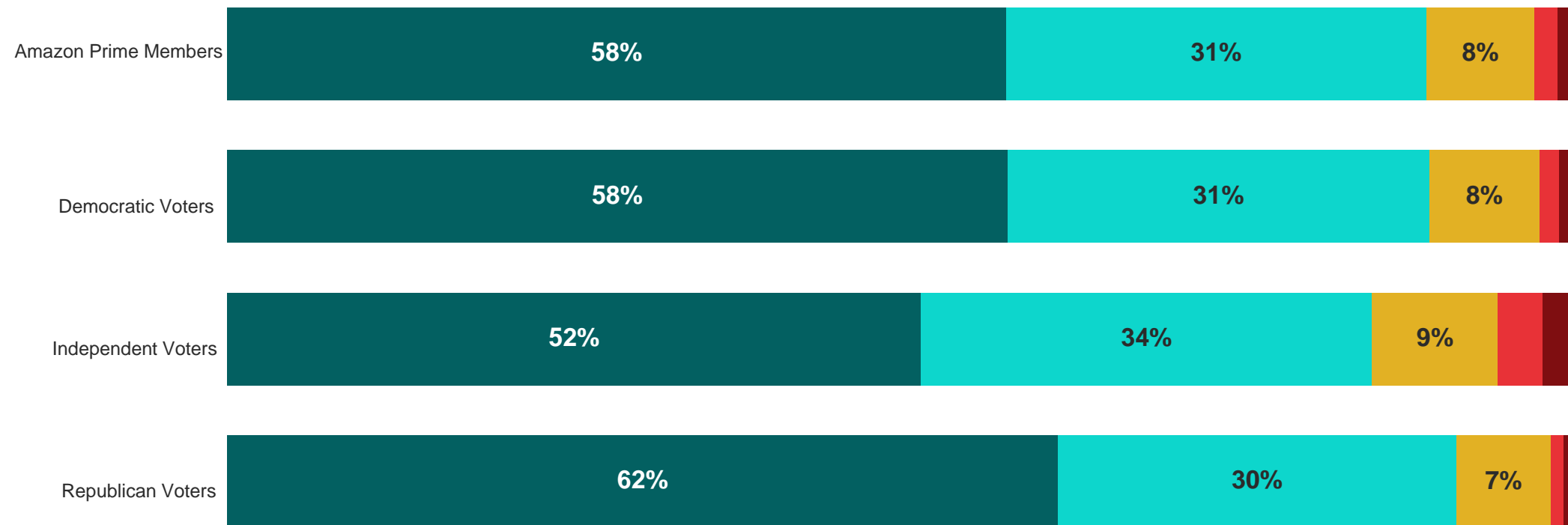
AMAZON PRIME

A strong bipartisan majority of Amazon Prime members are satisfied with their Amazon Prime membership.

How satisfied or unsatisfied are you with your Amazon Prime membership?

*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER

● Very satisfied
 ● Somewhat satisfied
 ● Neither satisfied or unsatisfied
 ● Somewhat unsatisfied
 ● Very unsatisfied



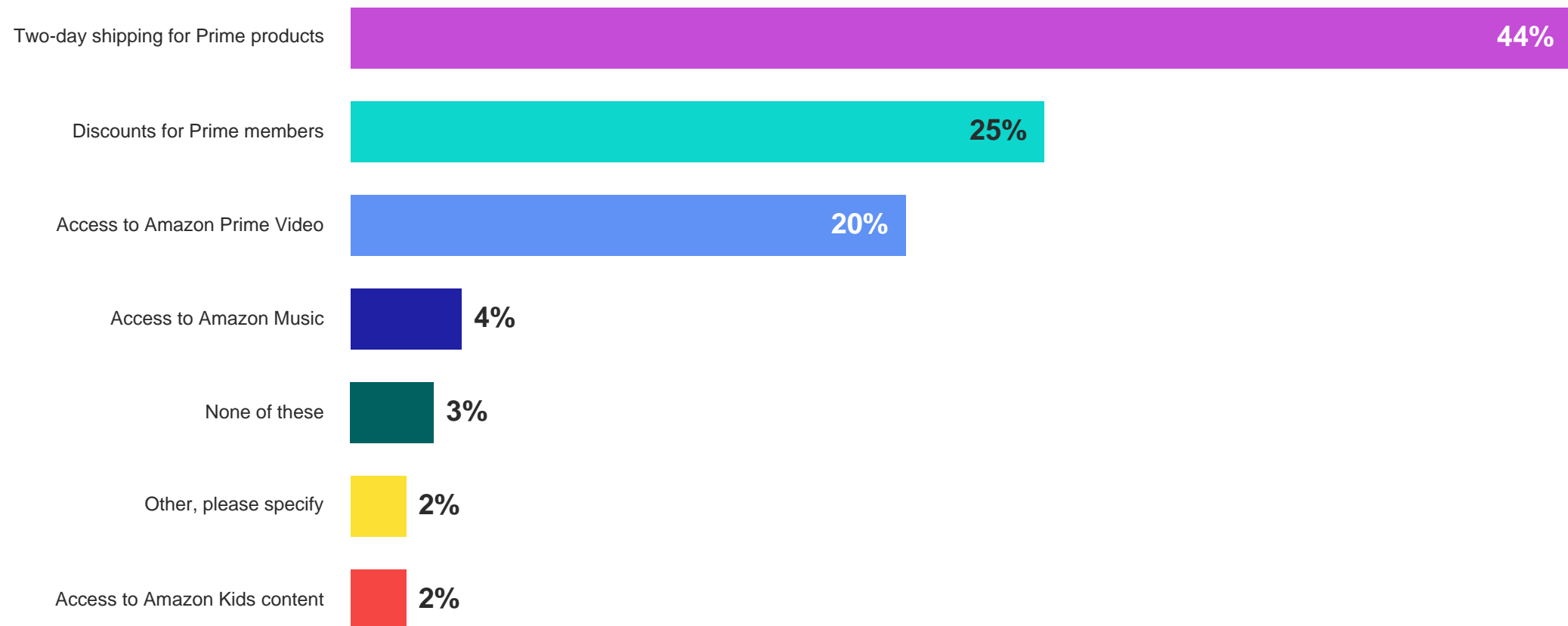
Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON PRIME

A plurality (44%) of Amazon Prime members say two-day shipping for Prime products is the most important reason they subscribe to Amazon prime, followed by discounts (25%) and access to Prime video (20%).

What is the most important reason you subscribe to Amazon Prime?

*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER

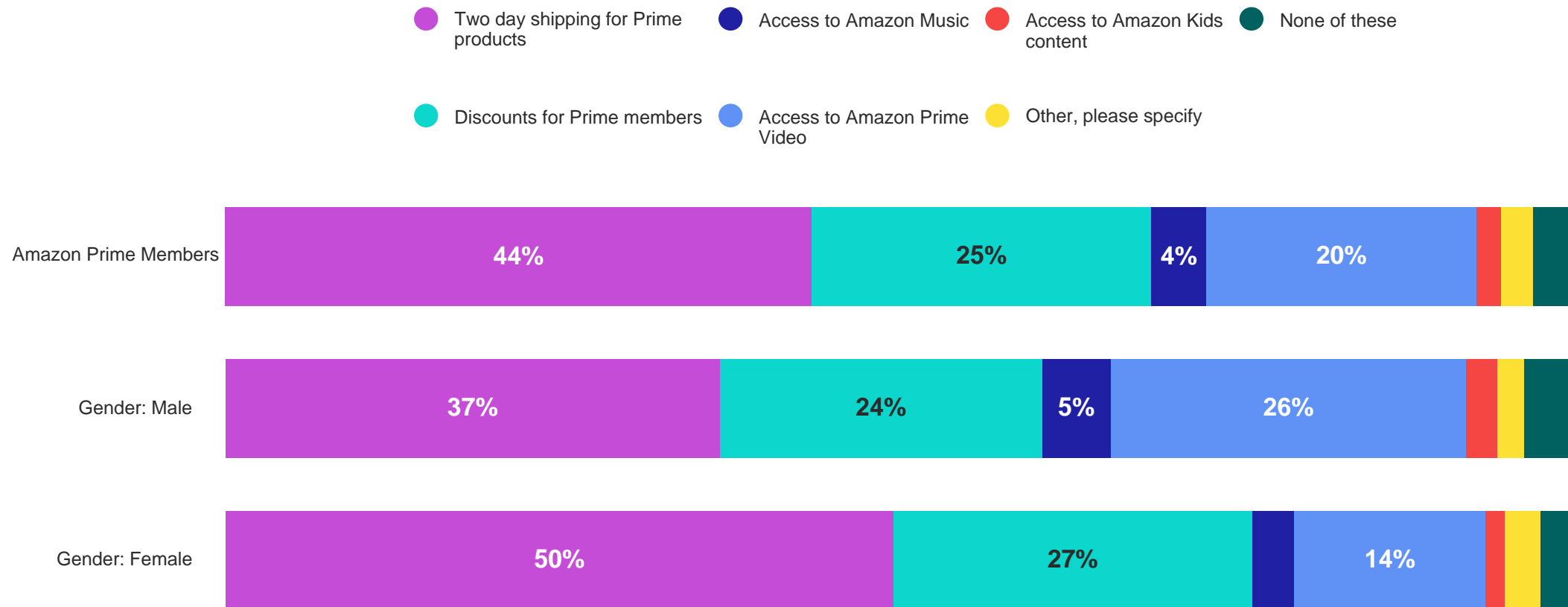


AMAZON PRIME

Among Amazon Prime members female voters (50%) are more likely than male voters (37%) to say two-day shipping is the most important reason they subscribe to Amazon Prime. On the other hand, male voters are more likely to say prime video (26%) is the most important reason they subscribe to Amazon Prime.

What is the most important reason you subscribe to Amazon Prime?

*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER

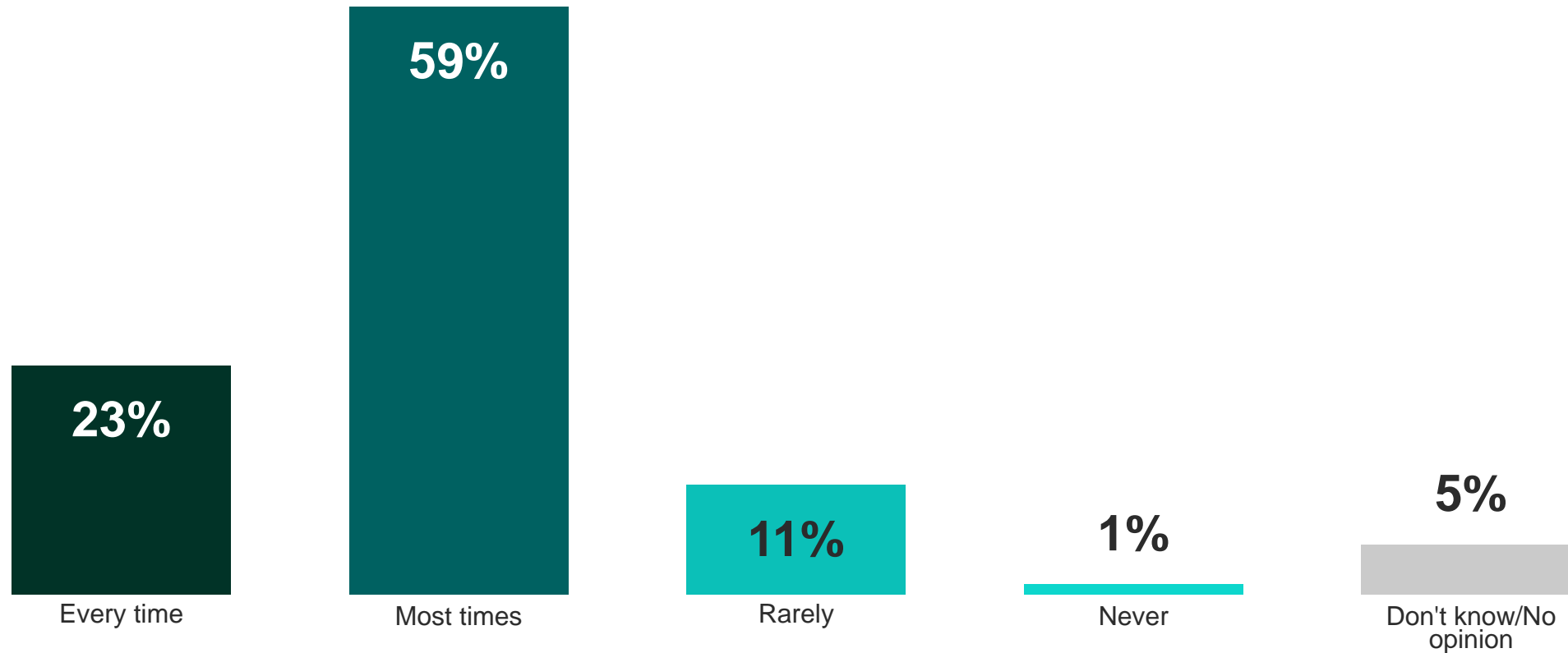


AMAZON PRIME

Four-in-five (82%) Amazon Prime members say they choose Prime-eligible products over non-Prime products most or every time when making a purchase on Amazon.

How frequently, if ever, do you choose Prime-eligible products over non-Prime products when making a purchase on Amazon?

*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER

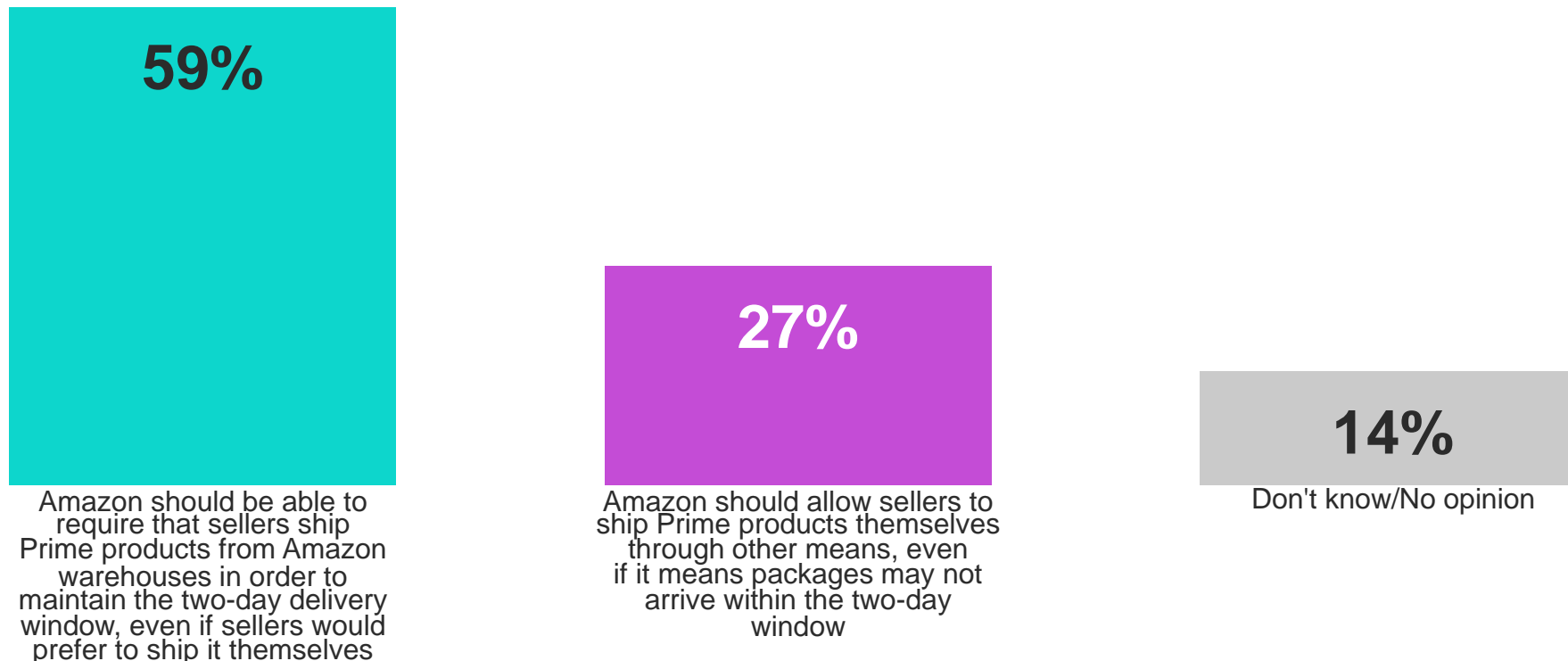


AMAZON PRIME

After learning more about the Amazon marketplace, a majority (59%) of Amazon Prime members (N=1,294)* think Amazon should be able to require that sellers ship Prime products from Amazon warehouses in order to maintain the two-day delivery window, even if sellers would prefer to ship it themselves.

[Asked only of respondents who said they are currently an Amazon Prime member] Amazon Prime products ship and arrive within two days of purchase because Amazon requires those products to be shipped from Amazon warehouses. Some have proposed that Amazon sellers be allowed to ship those products through other means, even though Amazon could not guarantee Prime orders would arrive on time. After learning more, which of the following is closest to your opinion?

*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER

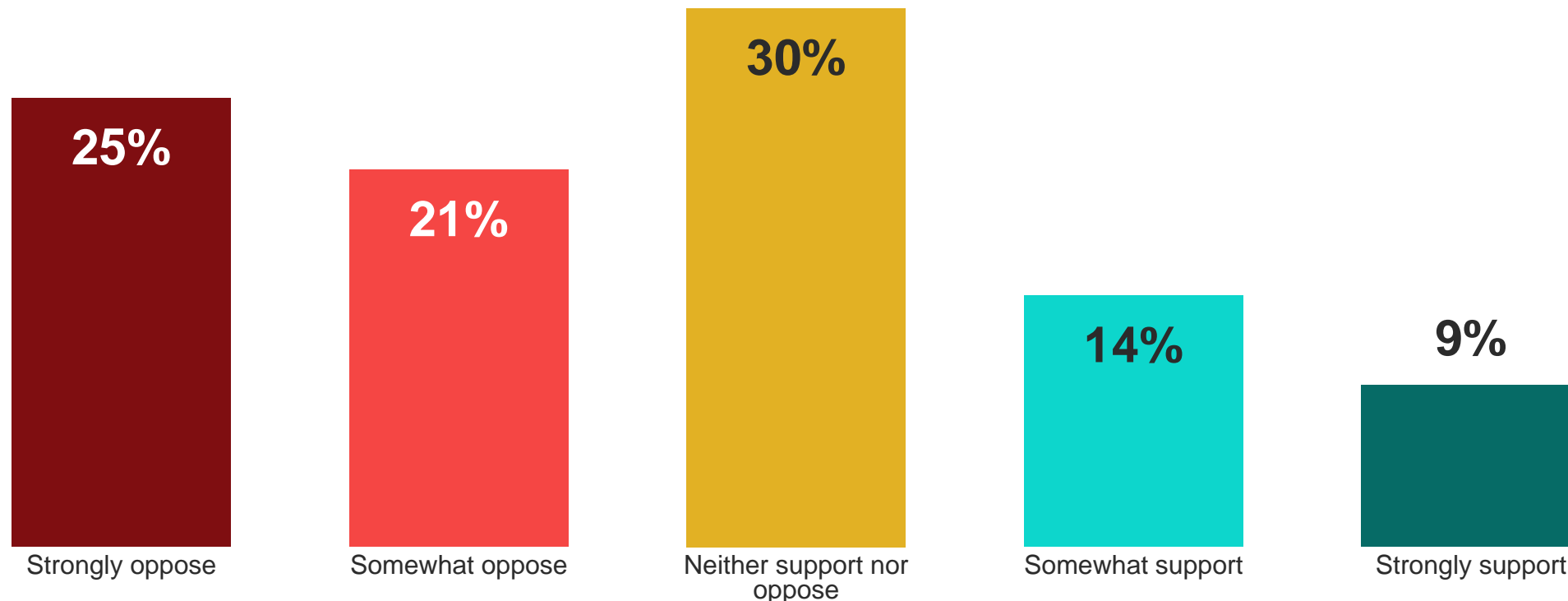


AMAZON PRIME

Amazon Prime members (N=1,294)* are more likely to oppose (46%) rather than support (23%) the federal government regulating the Amazon Prime program, which could include banning or changing some features.

[Asked only of respondents who said they are currently an Amazon Prime member] Do you support or oppose the federal government regulating the Amazon Prime program, which could include banning or changing some features?

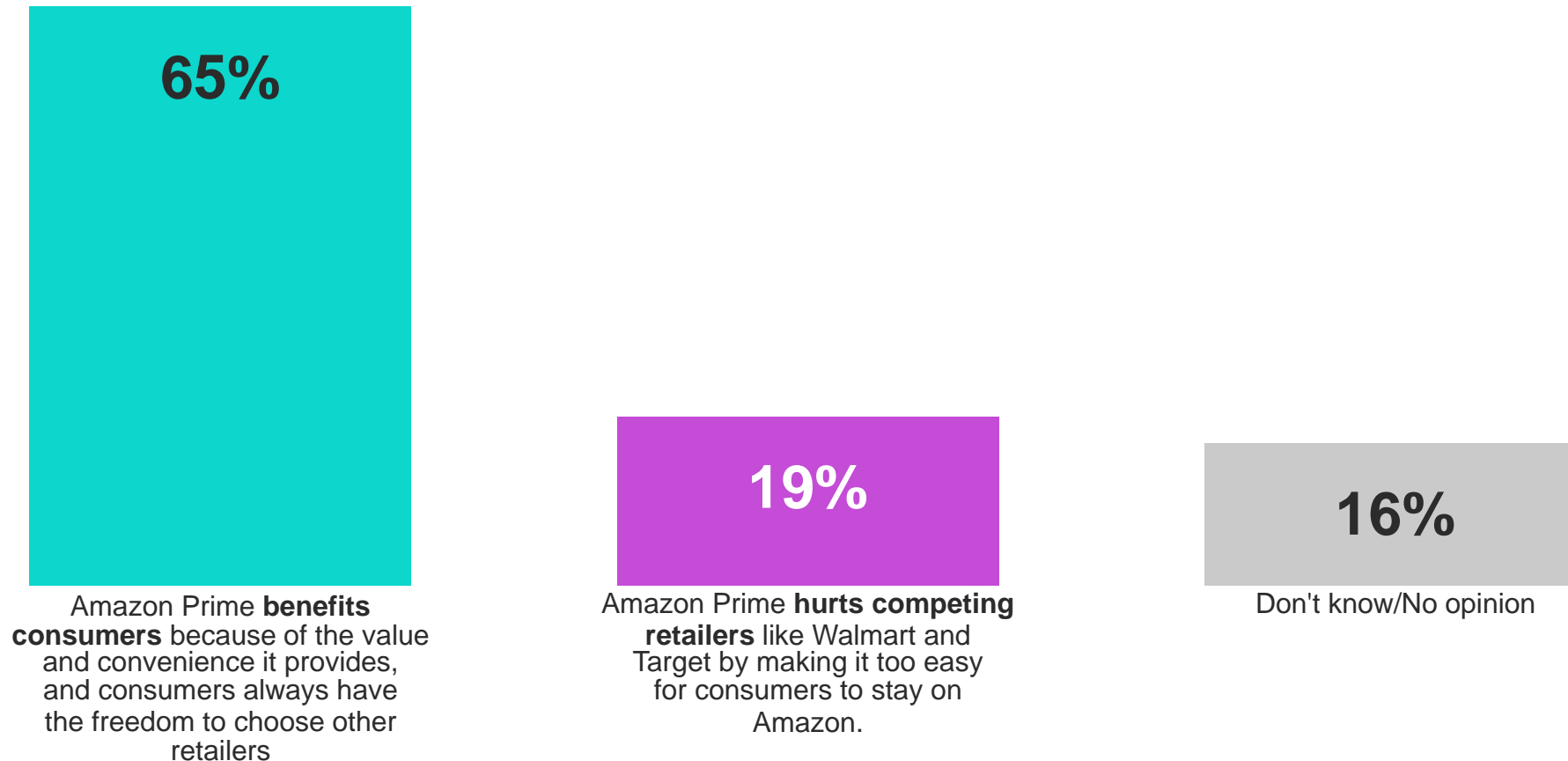
*AMAZON PRIME MEMBERS, N= 1,294 | *AMAZON PRIME MEMBER = SELF REPORTED AMAZON PRIME MEMBER



AMAZON PRIME

A majority of voters (65%) say Amazon Prime benefits consumers rather than hurting competitors (19%).

*Which of the following statements comes closest to your view?



*Question was split sampled, n=668

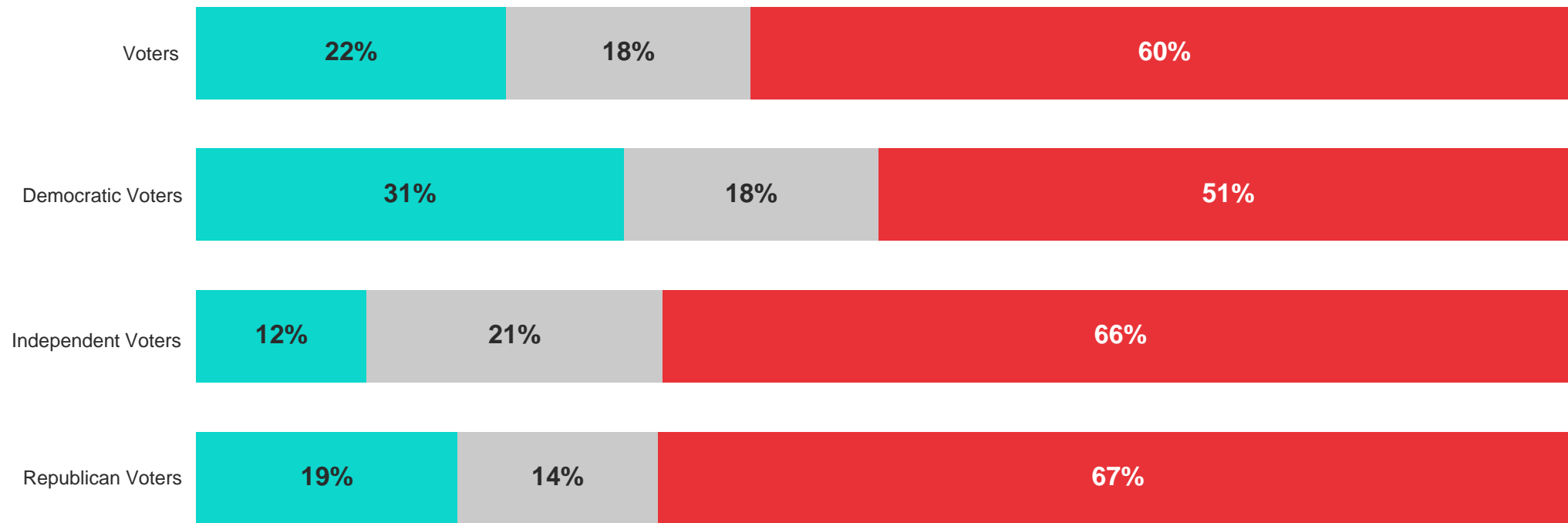
Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON PRIME

A bipartisan majority of voters think the federal government **should not** break up Amazon to benefit competitors.

*Some say consumers should be allowed to choose where they shop, even if that means consumers **choose Amazon over other competitors**. Others say consumers choose to shop at Amazon because of unfair advantages that **harm other competitors**. In your opinion, should the federal government break up Amazon to benefit competitors?

Yes Don't know No



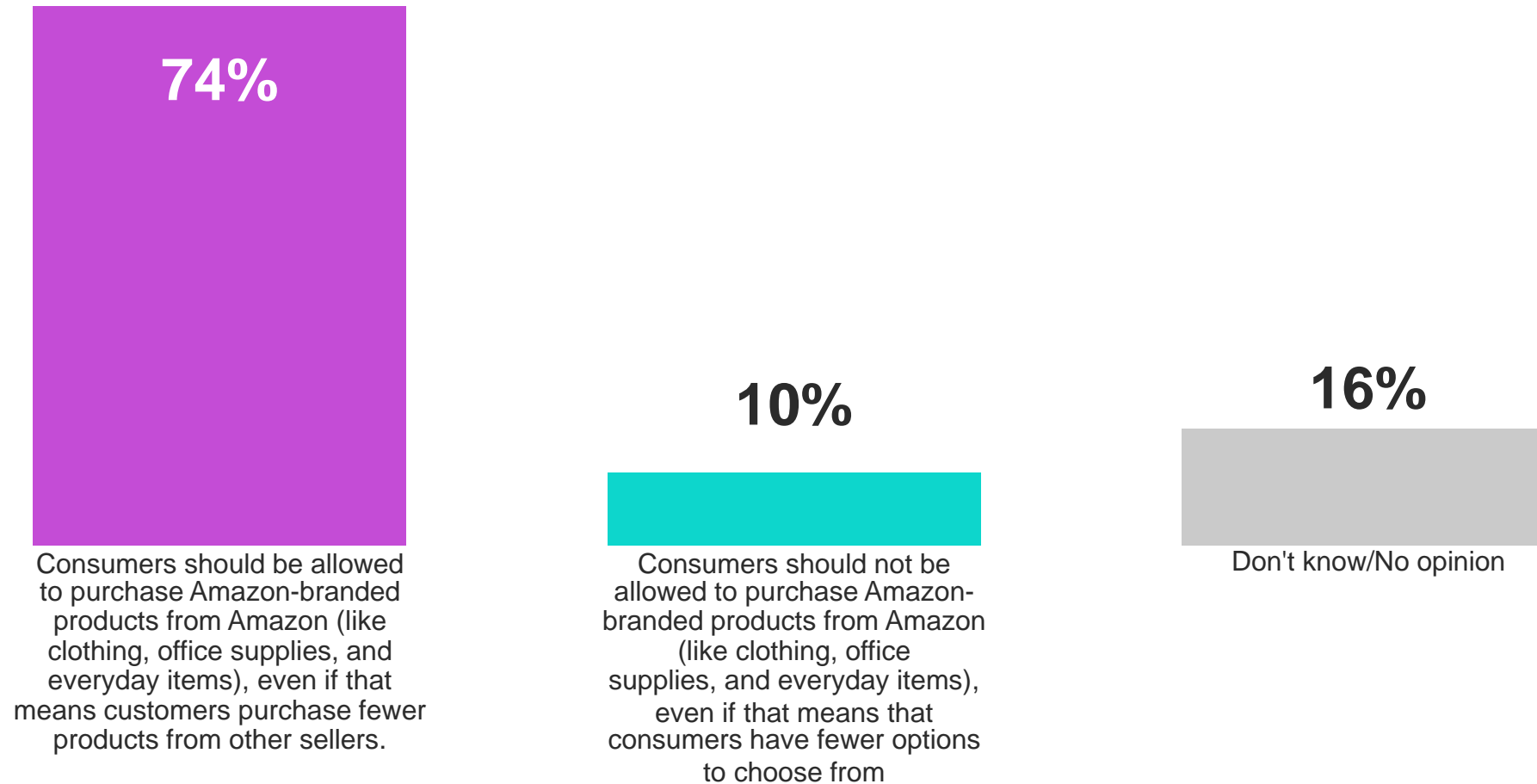
*Question was split sampled, n=668

Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON-BRANDED GOODS

Three-in-four voters (74%) think consumers should be allowed to purchase Amazon-branded products from Amazon even if that means customers purchase fewer products from other sellers. Just 10% of voters say customers should not be able to purchase Amazon-branded products from Amazon.

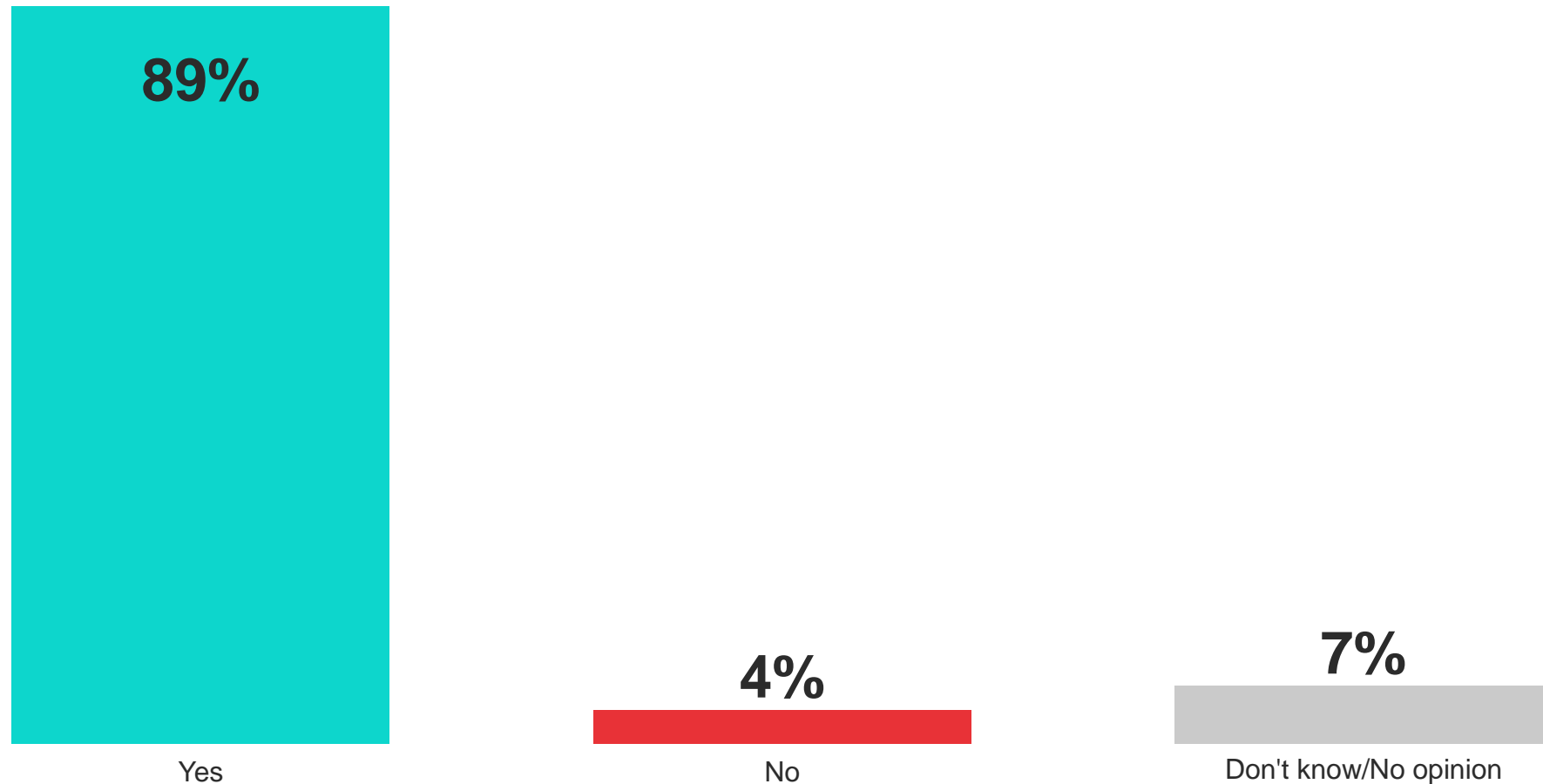
Which of the following is closest to your opinion?



AMAZON-BRANDED GOODS

A strong majority of voters (89%) think retail and grocery stores should be allowed to promote their own store brand products in their stores and on their websites.

*Should retail and grocery stores be allowed to promote their own store brand products in their stores and on their websites?



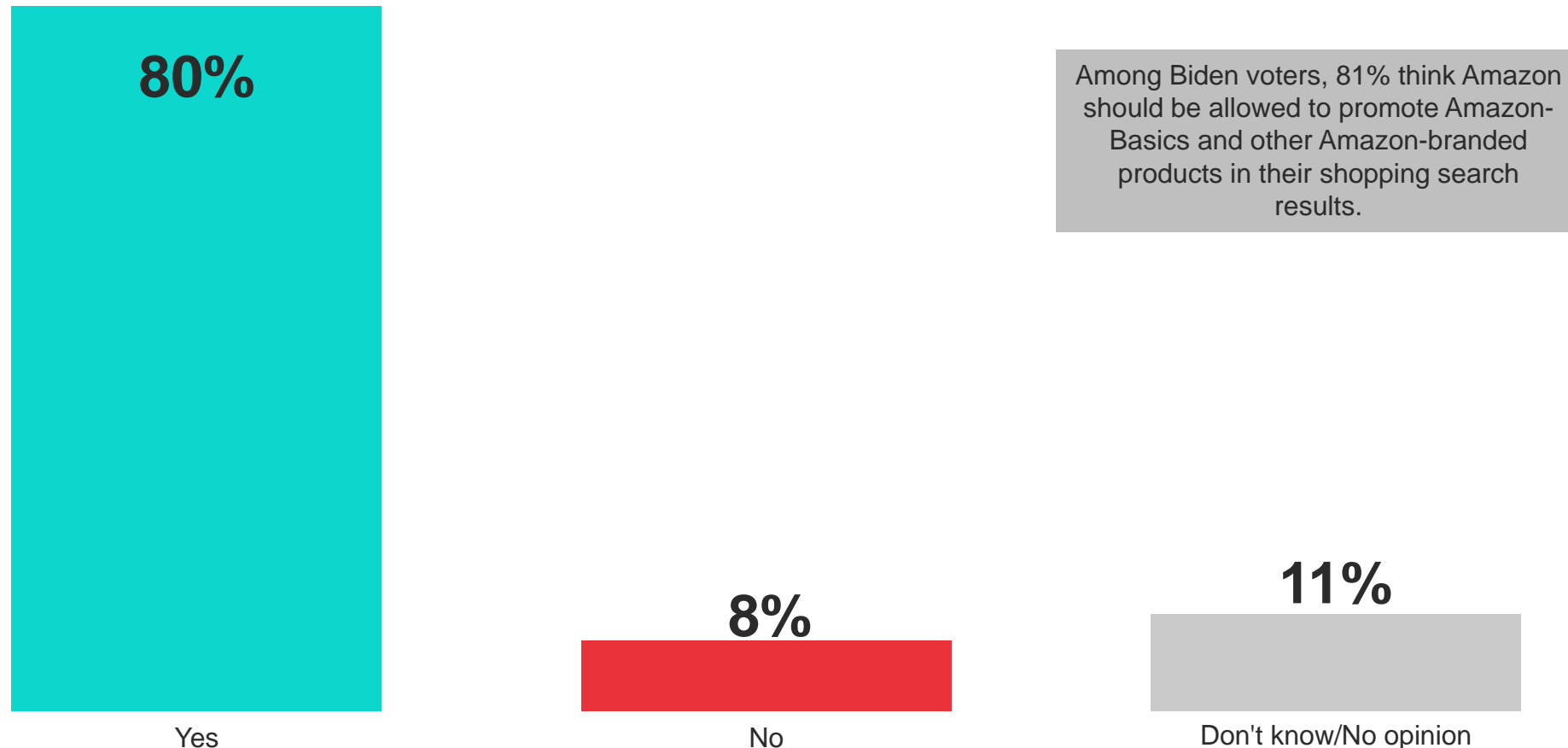
*Question was split sampled, n=668

Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON-BRANDED GOODS

Four-in-five voters (80%) think Amazon should be allowed to promote Amazon-Basics and other Amazon-branded products in their shopping search results.

*Should Amazon be allowed to promote Amazon Basics and other Amazon-branded products like clothing, office supplies, and everyday items in their shopping search results?



*Question was split sampled, n=622

Methodology: This poll was conducted between March 4-6, 2023 among a sample of 2,008 registered voters. The interviews were conducted online and the data were weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

AMAZON-BRANDED GOODS

Seven-in-ten voters (69%) think Amazon-branded products can be a good way for consumers to save money rather than thinking Amazon-branded products hurt name-brand sellers by duplicating their merchandise (15%).

What's closest to your view toward Amazon-branded products like clothing, office supplies, and everyday items in general?





MORNING CONSULT®