RESEARCH OVERVIEW

Finsbury Glover Hering, commissioned by Chamber of Progress and NetChoice, conducted an online survey with Registered Voters across Arizona. The survey included:

800 registered voters in Arizona aged 18+

- Representative of Arizona's registered voter population in terms of gender, age, region, race, education, and party identification

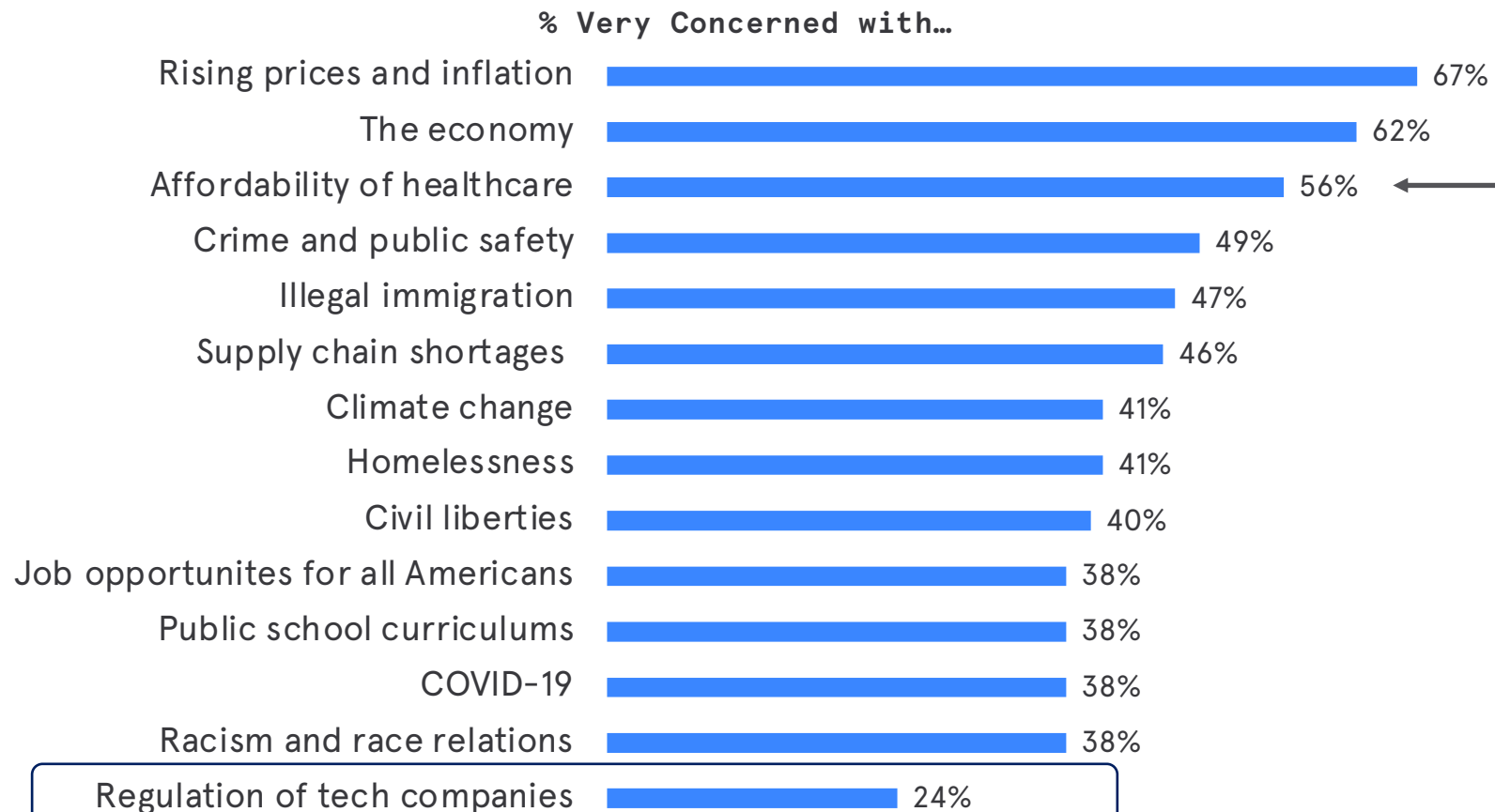- Fieldwork was conducted from November 2 – November 16, 2021.

WHAT MATTERS TO ARIZONANS?

Arizonan voters are deeply concerned about rising prices and the economy, with Democrats especially concerned with the affordability of healthcare

(Q1.) The following is a list of issues that some people feel are impacting the country. How concerned would you say you are with each? Answer choices: very concerned, somewhat concerned, not very concerned, not concerned at all)

% Very Concerned with…

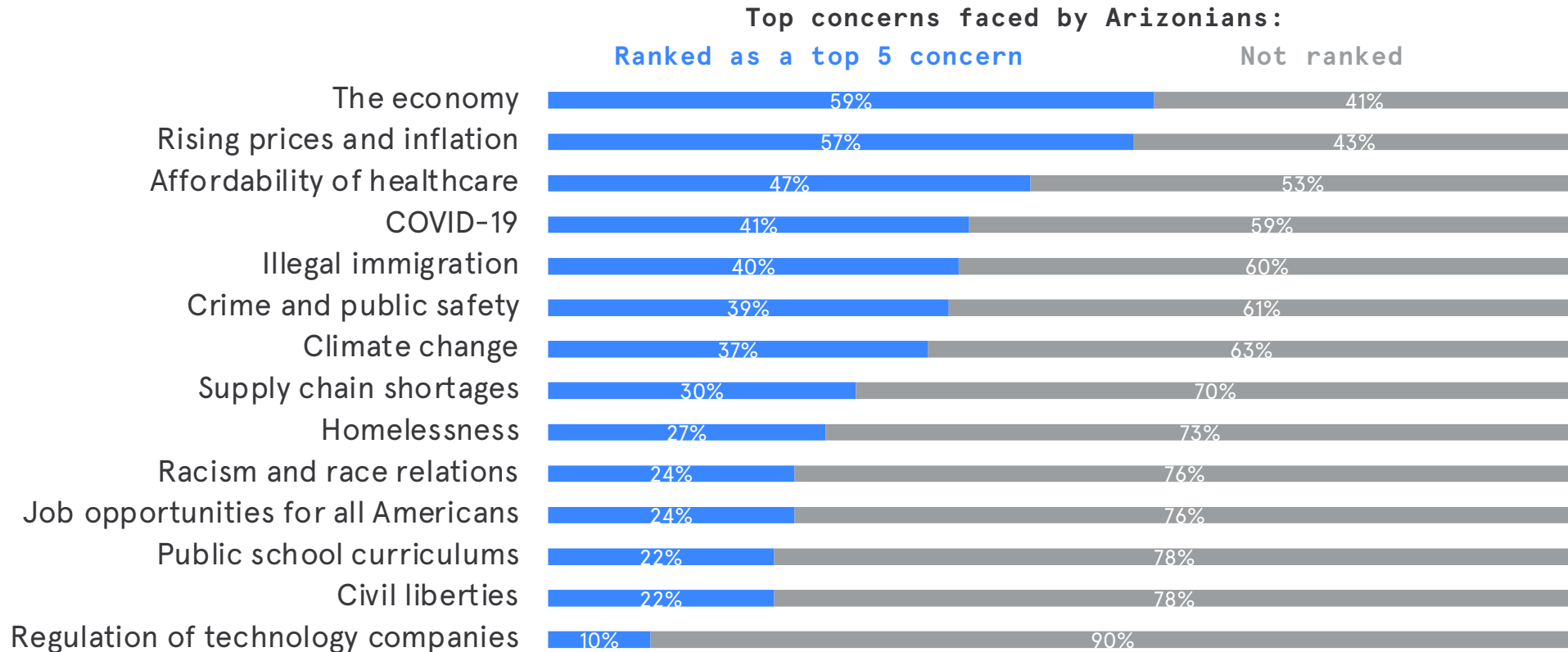| Issue	%
Rising prices and inflation	67%
The economy	62%
Affordability of healthcare	56%
Crime and public safety	49%
Illegal immigration	47%
Supply chain shortages	46%
Climate change	41%
Homelessness	41%
Civil liberties	40%
Job opportunites for all Americans	38%
Public school curriculums	38%
COVID-19	38%
Racism and race relations	38%
Regulation of tech companies	24%

Baby Boomers+ are especially concerned with rising prices (73%)

Democrats are especially concerned with affordability of healthcare (70%)

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Voters prioritize dealing with the economy and healthcare, with only 1 in 10 rating regulation of tech companies as a top five concern

(Q2.) Of the following list, which FIVE would you say are the most pressing issues that politicians should be addressing? Within your top five, please rate them in terms of importance to you, with 1 being "most" pressing and 5 being "least" pressing.

Top concerns faced by Arizonians:

Ranked as a top 5 concern   Not ranked

Concern	Ranked as a top 5 concern	Not ranked
The economy	59%	41%
Rising prices and inflation	57%	43%
Affordability of healthcare	47%	53%
COVID-19	41%	59%
Illegal immigration	40%	60%
Crime and public safety	39%	61%
Climate change	37%	63%
Supply chain shortages	30%	70%
Homelessness	27%	73%
Racism and race relations	24%	76%
Job opportunities for all Americans	24%	76%
Public school curriculums	22%	78%
Civil liberties	22%	78%
Regulation of technology companies	10%	90%

70% of Republicans rank the economy as a top-5 concern

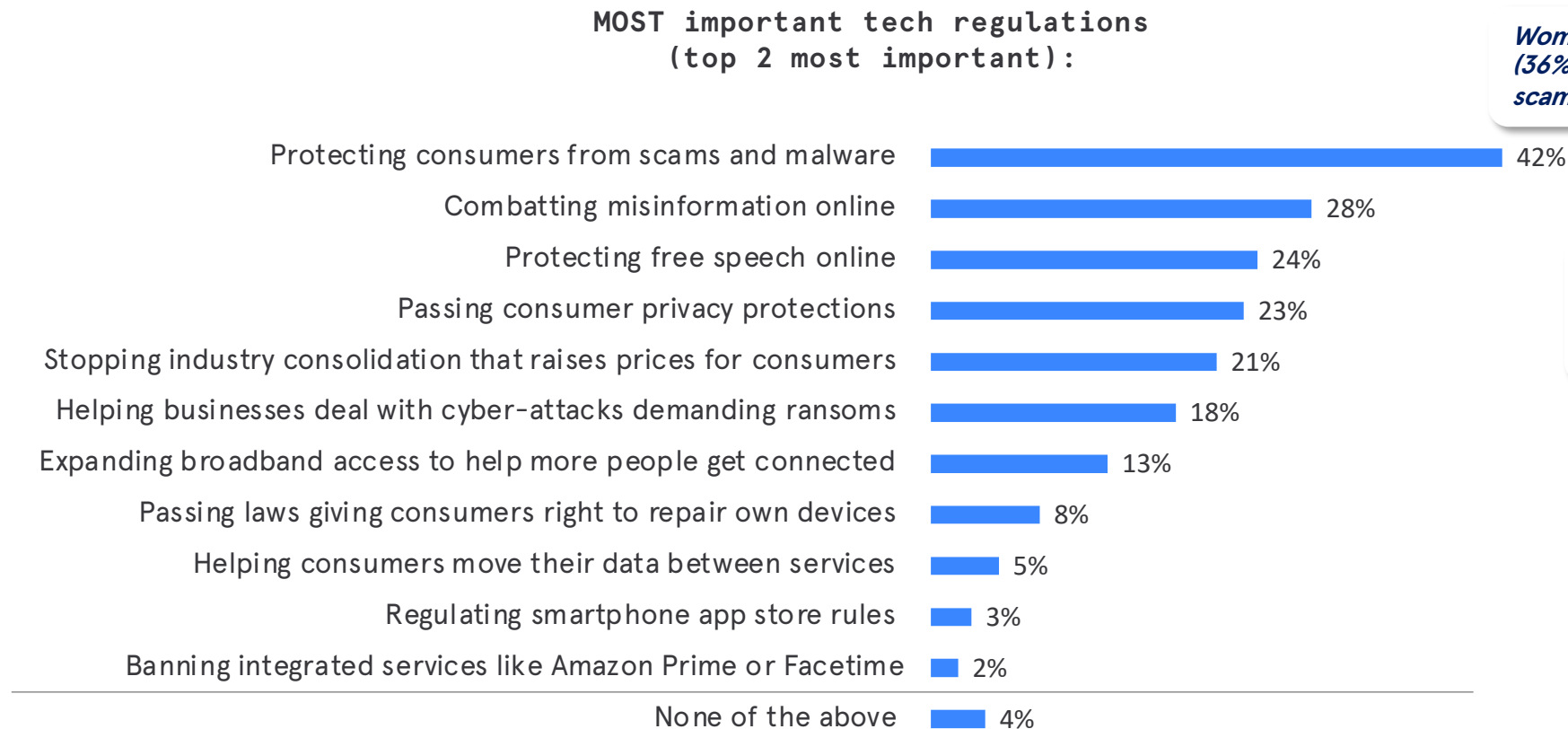*60% of Democrats rank COVID-19 as their top 1-5 concern*

ATTITUDES TOWARD TECH REGULATION

When it comes to tech regulations, voters prioritize protecting consumers from scams and malware, followed by combatting misinformation online

(Q11.) Looking at the following list of potential ways that technology products and services could be regulated, which would you say are the TWO MOST important to you?

MOST important tech regulations (top 2 most important):

Regulation	%
Protecting consumers from scams and malware	42%
Combatting misinformation online	28%
Protecting free speech online	24%
Passing consumer privacy protections	23%
Stopping industry consolidation that raises prices for consumers	21%
Helping businesses deal with cyber-attacks demanding ransoms	18%
Expanding broadband access to help more people get connected	13%
Passing laws giving consumers right to repair own devices	8%
Helping consumers move their data between services	5%
Regulating smartphone app store rules	3%
Banning integrated services like Amazon Prime or Facetime	2%
None of the above	4%

Women (48%) are more likely than men (36%) to say protecting consumers from scams and malware is most important
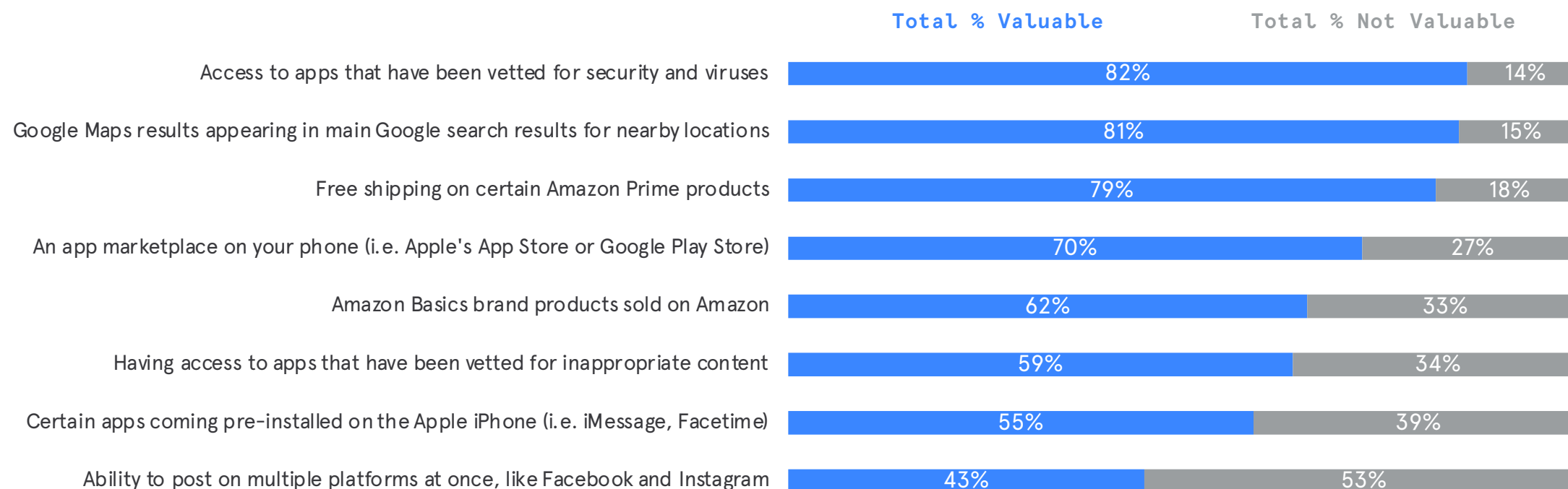
37% of Democrats say combatting misinformation is key, while 37% of Republicans say protecting free speech is key

Voters attach most value to features that vet for security and viruses, followed by convenience features offered by a range of technology companies

(Q7.) How valuable do you consider the following offerings from apps or online platforms to be in your daily life, if at all?
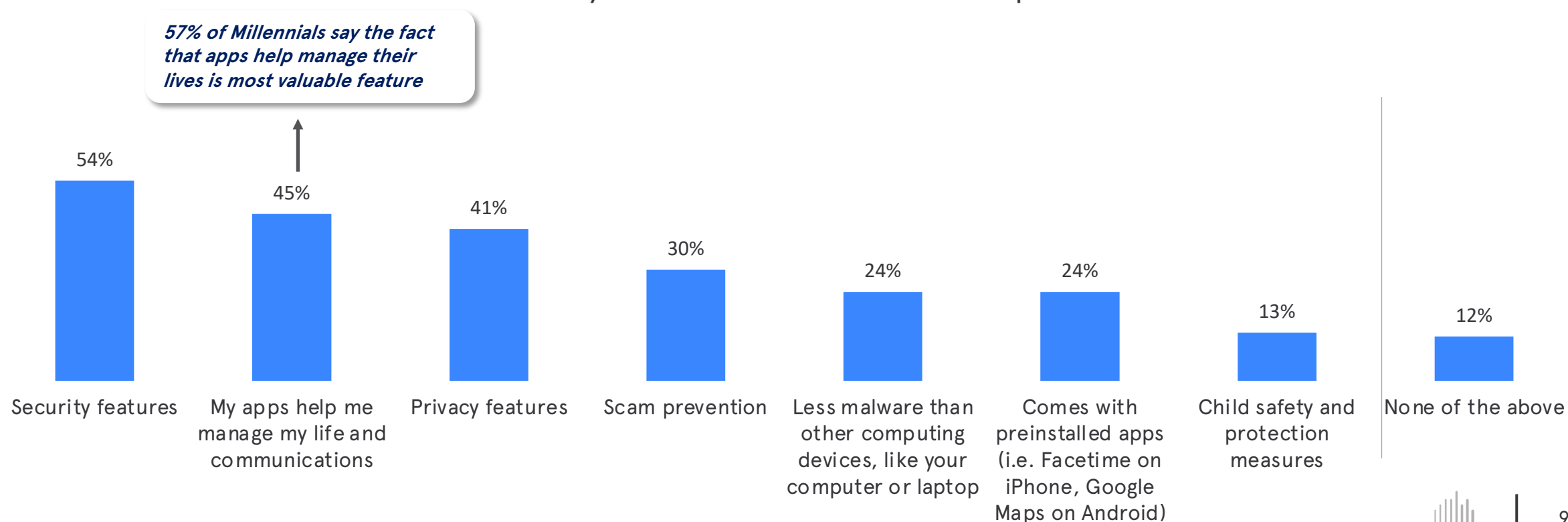
% valuable to have from apps or online platforms in daily life*:

	Total % Valuable	Total % Not Valuable
Access to apps that have been vetted for security and viruses	82%	14%
Google Maps results appearing in main Google search results for nearby locations	81%	15%
Free shipping on certain Amazon Prime products	79%	18%
An app marketplace on your phone (i.e. Apple's App Store or Google Play Store)	70%	27%
Amazon Basics brand products sold on Amazon	62%	33%
Having access to apps that have been vetted for inappropriate content	59%	34%
Certain apps coming pre-installed on the Apple iPhone (i.e. iMessage, Facetime)	55%	39%
Ability to post on multiple platforms at once, like Facebook and Instagram	43%	53%

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Some statements have been shortened for formatting purposes

Security, convenience, and privacy are top valued features provided by smartphones

(Q6.) Which of the following would you say you value MOST about you and your family's smartphones? Please select the three you value most.
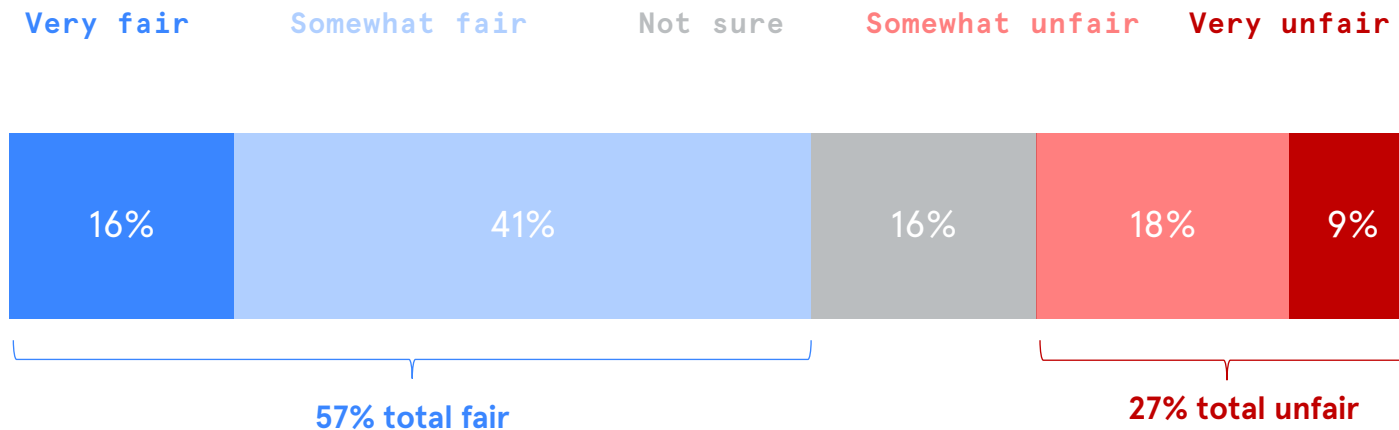
% say MOST valuable to have on smartphones:

57% of Millennials say the fact that apps help manage their lives is most valuable feature

Security features	My apps help me manage my life and communications	Privacy features	Scam prevention	Less malware than other computing devices, like your computer or laptop	Comes with preinstalled apps (i.e. Facetime on iPhone, Google Maps on Android)	Child safety and protection measures	None of the above
54%	45%	41%	30%	24%	24%	13%	12%

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A majority believe app marketplace commission fees are fair

(Q8.) How fair do you believe it is that companies like Google and Apple, that provide App Stores to users, charge a commission fee to developers on the sale of digital goods in those stores?

Fairness of companies like Google and Apple, which provide App Stores, charging
commission fee to developers on sale of digital goods

Very fair   Somewhat fair   Not sure   Somewhat unfair   Very unfair

16%	41%	16%	18%	9%

57% total fair

27% total unfair

More likely to say it's fair:
- *Parents (73%)*
- *Men (63%)*
- *Those under 55 YO (64%)*
- *Democrats (61%)*

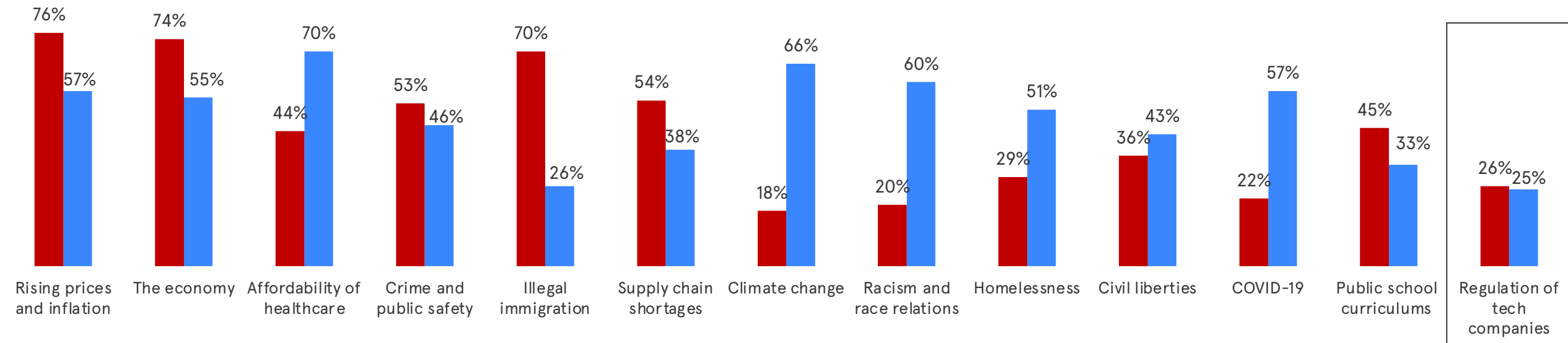THANK YOU

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RESULTS BY PARTY IDENTIFICATION

Republicans and Democrats have starkly different priorities, but agree that the regulation of tech companies isn't one of them

(Q1.) The following is a list of issues that some people feel are impacting the country. How concerned would you say you are with each? Answer choices: very concerned, somewhat concerned, not very concerned, not concerned at all)

% Very Concerned with…

Republicans   **Democrats**

Issue	Republicans	Democrats
Rising prices and inflation	76%	57%
The economy	74%	55%
Affordability of healthcare	44%	70%
Crime and public safety	53%	46%
Illegal immigration	70%	26%
Supply chain shortages	54%	38%
Climate change	18%	66%
Racism and race relations	20%	60%
Homelessness	29%	51%
Civil liberties	36%	43%
COVID-19	22%	57%
Public school curriculums	45%	33%
Regulation of tech companies	26%	25%

These differing priorities lead their expectations for policymakers - regulation of tech companies is not something either party especially desires to see on the 2022 agenda

(Q2.) Of the following list, which FIVE would you say are the most pressing issues that politicians should be addressing? Within your top five, please rate them in terms of importance to you, with 1 being "most" pressing and 5 being "least" pressing.

Top concerns faced by Arizonians:

Republicans	Ranked 1-5	Not Ranked
The economy	70%	30%
Rising prices and inflation	67%	33%
Illegal immigration	64%	36%
Crime and public safety	51%	49%
Supply chain shortages	37%	63%
Affordability of healthcare	37%	63%
Public school curriculums	31%	69%
COVID-19	25%	75%
Civil liberties	21%	79%
Homelessness	19%	81%
Climate change	17%	83%
Regulation of tech companies	9%	91%
Racism and race relations	8%	92%

Democrats	Ranked 1-5	Not Ranked
COVID-19	60%	40%
Affordability of healthcare	58%	42%
Climate change	57%	43%
The economy	49%	51%
Rising prices and inflation	46%	54%
Racism and race relations	41%	59%
Homelessness	32%	68%
Crime and public safety	26%	74%
Civil liberties	23%	77%
Supply chain shortages	21%	79%
Illegal immigration	19%	81%
Public school curriculums	14%	86%
Regulation of tech companies	12%	88%

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RESULTS BY CONGRESSIONAL DISTRICTS

No matter where they live, Arizonans are concerned with rising prices, inflation and the economy; regulation of tech companies falls to bottom of concerns district by district

(Q1.) The following is a list of issues that some people feel are impacting the country. How concerned would you say you are with each? Answer choices: very concerned, somewhat concerned, not very concerned, not concerned at all)

% Very Concerned with…

	1st CD	2nd CD	3rd CD	4th CD	5th CD	6th CD	7th CD	8th CD	9th CD
Rising prices and inflation	78%	69%	55%	62%	71%	69%	71%	56%	71%
The economy	68%	62%	58%	68%	72%	57%	58%	56%	53%
Affordability of healthcare	58%	52%	64%	56%	50%	54%	65%	50%	58%
Crime and public safety	56%	53%	47%	49%	48%	46%	48%	47%	40%
Supply chain shortages	40%	50%	48%	43%	46%	43%	54%	45%	44%
Illegal immigration	55%	50%	29%	55%	45%	51%	43%	54%	29%
Homelessness	43%	47%	46%	35%	37%	39%	48%	36%	35%
Climate change	39%	46%	51%	33%	36%	51%	40%	34%	32%
Civil liberties	46%	42%	43%	35%	38%	34%	49%	41%	32%
Job opportunities for all Americans	49%	46%	38%	39%	33%	32%	40%	36%	26%
Racism and race relations	46%	43%	47%	31%	35%	37%	48%	32%	22%
COVID-19	45%	40%	45%	33%	31%	35%	57%	30%	30%
Public school curriculums	39%	40%	38%	42%	40%	35%	42%	44%	17%
Regulation of technology companies	29%	26%	21%	23%	19%	28%	22%	30%	20%

In terms of potential outcomes of tech regulation, Arizonans prioritize consumer protections - they want to be shielded from scams and malware

(Q11.) Looking at the following list of potential ways that technology products and services could be regulated, which would you say are the TWO MOST important to you?

MOST important tech regulations (top 2 most important):

	1st CD	2nd CD	3rd CD	4th CD	5th CD	6th CD	7th CD	8th CD	9th CD
Protecting consumers from scams and malware	49%	48%	35%	44%	44%	42%	38%	37%	43%
Combatting misinformation online	23%	27%	32%	23%	24%	33%	36%	31%	30%
Protecting free speech online	22%	19%	22%	27%	27%	26%	28%	26%	18%
Passing consumer privacy protections	19%	22%	21%	34%	20%	24%	18%	24%	24%
Stopping industry consolidation that raises prices for consumers	22%	20%	21%	21%	22%	16%	24%	20%	23%
Helping businesses deal with cyber-attacks demanding ransoms	21%	15%	13%	16%	25%	17%	15%	20%	17%
Expanding broadband access to help more people get connected	16%	18%	21%	9%	11%	10%	11%	14%	14%
Passing laws giving consumers the right to repair their own devices	7%	7%	11%	7%	5%	10%	6%	12%	7%
Helping consumers move their data between services	7%	3%	6%	4%	5%	6%	6%	3%	10%
Regulating smartphone app store rules	4%	5%	5%	1%	3%	3%	5%	4%	2%
Banning integrated services like Amazon Prime or Facetime on iPhones	1%	5%	4%	2%	3%	1%	3%	0%	2%
None of the above	4%	6%	2%	5%	5%	3%	2%	4%	5%

Similarly, most say charging commission fees is fair - greatest pushback comes from the 6th and 1st Districts

(Q8.) How fair do you believe it is that companies like Google and Apple, that provide App Stores to users, charge a commission fee to developers on the sale of digital goods in those stores?

Fairness of companies like Google and Apple, which provide App Stores, charging commission fee to developers on sale of digital goods

	Total fair	Not sure	Total unfair
1st CD	54%	13%	33%
2nd CD	65%	13%	22%
3rd CD	63%	16%	21%
4th CD	54%	19%	28%
5th CD	50%	22%	28%
6th CD	54%	10%	37%
7th CD	64%	12%	24%
8th CD	54%	23%	24%
9th CD	60%	24%	16%