July 29, 2021

TO: Center for American Progress Action Fund and Public Citizen
FROM: Nancy Zdunkewicz, Change Research
RE: Strong bipartisan support for regulation of tech & social media

American voters are spending more time than ever online and consider themselves well informed about how technology and social media work. They have come to the shared opinion that social media and tech companies have too much power and influence over politics and government. Though partisans arrive at this conclusion for different reasons, voters across the ideological spectrum support greater regulation of tech and social media. This is according to a new Center for American Progress Action Fund and Public Citizen poll of 1,200 voters nationally conducted by Change Research on June 7-12, 2021.[1]

Technology use and knowledge

Online activity has grown during the past year. A 55% majority report spending more time online during the pandemic and only 4% say that they are spending less time online. The average American voter now spends 6.2 hours online. Roughly 3-in-10 voters spend 1 to 3 hours online each day on average (31%), as many spend 4 to 6 hours online (32%), and the rest spend 7 hours or more online. Voters under the age of 50, people of color, voters in urban areas and Democrats are spending the most time online while seniors, non-college men, and Republicans are spending the least amount of time online.

Use & knowledge of technology & social media

	Average familiarity with tech (0-10)	Average # of hrs online a day	% on social media several times a day
Total	6.8	6.2	86
18 to 34	7.4	7.6	91
35 to 49	7.6	7.8	89
50 to 64	6.8	5.3	82
65+	5.9	4.6	83
White	6.7	6.0	85
People of color	7.3	6.9	87
College Women	6.9	6.5	90
College Men	7.2	6.7	83
Non-College Women	6.4	6.5	87
Non-College Men	7.0	5.2	82
Urban	7.0	6.8	85
Suburban	6.9	5.9	83
Rural	6.7	5.7	89
Democrats+leaners	7.0	7.0	92
Pure independent	6.7	6.7	80
Republicans+leaners	6.7	5.2	81

*several times a day = multiple or a few times each day

More specifically, 86% of voters report using social media several times a day. Though voters under 50 and women are the most active, at least 8-in-10 voters across major demographic and political subgroups check social media at least a few times each day.

Voters consider themselves knowledgeable about technology in terms of how things like computers, smart phones, apps, and social media work and the kinds of information they gather. The average voter rates their knowledge a 6.8 on a 0 to 10 scale and 43% of voters have a strong understanding (8+). Only 14% rate their understanding on the lower end of the spectrum (0 to 4).
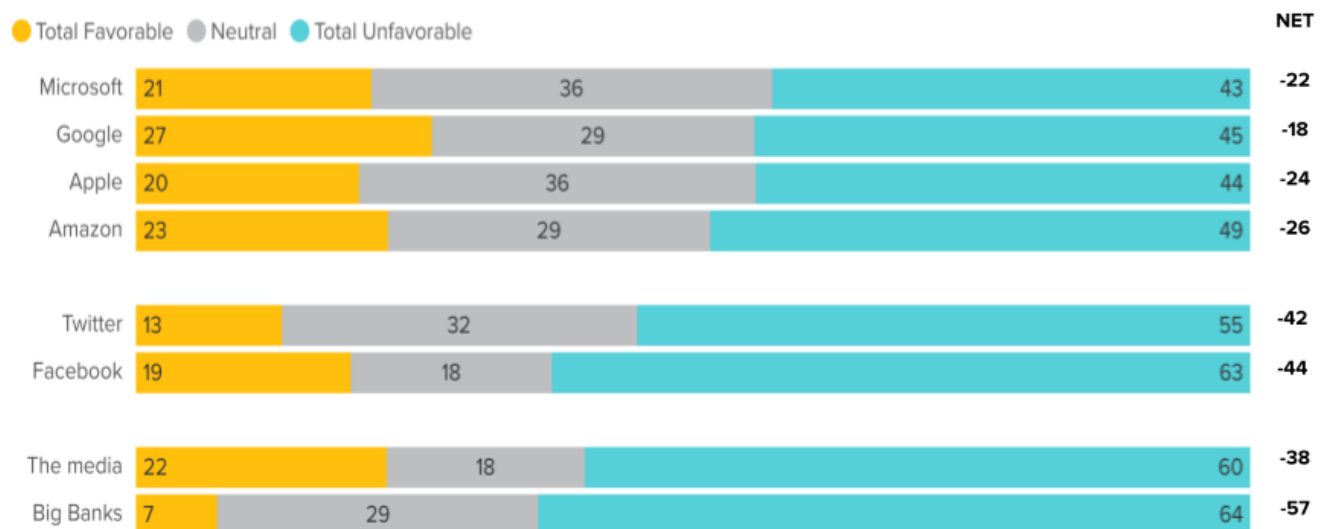
Voters under the age of 50 were the most likely and seniors were the least likely to report a strong understanding of technology. People of color reported a higher average knowledge of technology than white voters. Despite spending fewer hours online on average, non-college men rated their knowledge higher than non-college women.

Technology and social media companies

Social media companies are now some of the most unpopular companies in America. A 63% majority is unfavorable towards Facebook and 55% are unfavorable towards Twitter. The antipathy towards social media companies now rivals that towards loathed industries like 'Big Banks' and 'The Media'. Other individual technology companies such as Google, Apple, Amazon, and Microsoft are net negative by roughly 20 points, but that is largely produced by a large number of neutral opinions; fewer than half are unfavorable towards each.

Opinions of social media & tech companies

How favorable are your feelings about each of the following people, companies, organizations and groups?

● Total Favorable ● Neutral ● Total Unfavorable

Company	Total Favorable	Neutral	Total Unfavorable	NET
Microsoft	21	36	43	-22
Google	27	29	45	-18
Apple	20	36	44	-24
Amazon	23	29	49	-26
Twitter	13	32	55	-42
Facebook	19	18	63	-44
The media	22	18	60	-38
Big Banks	7	29	64	-57

There are important differences in the opinions of Democrats and Republicans. Democrats are net-favorable towards Microsoft, Google and Apple, divided over Twitter, and net-unfavorable towards Facebook and Amazon. Meanwhile, majorities of Republicans are unfavorable towards every company tested. The GOP is particularly unfavorable towards Facebook and Twitter which have recently 'deplatformed' the former Republican President.

Opinions of tech companies by party

● Total Favorable ● Neutral ● Total Unfavorable

	Total Favorable	Neutral	Total Unfavorable	NET
Microsoft				
Democrats + Leaners	36	46	18	+18
Republicans + Leaners	9	25	66	-57
Google				
Democrats + Leaners	47	34	19	+28
Republicans + Leaners	7	23	70	-63
Apple				
Democrats + Leaners	34	42	24	+10
Republicans + Leaners	8	29	63	-55
Amazon				
Democrats + Leaners	30	28	42	-12
Republicans + Leaners	15	29	56	-41
Twitter				
Democrats + Leaners	25	50	25	--
Republicans + Leaners	3	11	86	-83
Facebook				
Democrats + Leaners	34	26	40	-6
Republicans + Leaners	5	8	87	-82

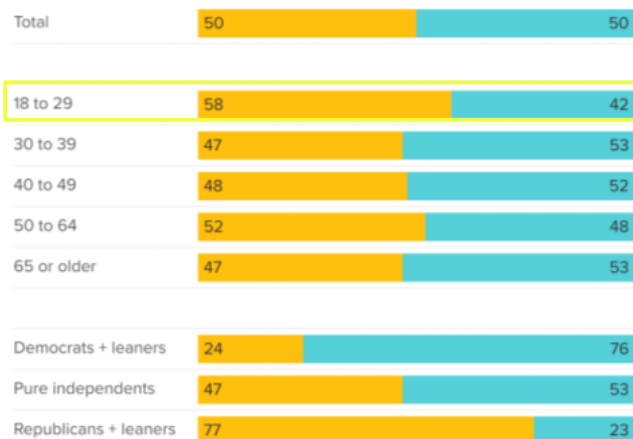## The power and influence of technology in U.S. political life

Voters have mixed opinions about the net impact of technology companies on American life. In a forced choice, voters split evenly between saying '*Technology companies are mostly bad for America, and have too much power that hurts local businesses and threatens people's privacy and free speech rights*' and '*Technology companies are mostly good for America, and provide good jobs and important products and services that consumers need.*' There are important differences in opinion on the impact of tech companies by party: 76% of Democrats say they are mostly *good* for the U.S. while 77% of Republicans say they are mostly *bad*. Despite being overwhelmingly Democrats, 58% of 18 to 29 year olds consider tech companies mostly bad; other age cohorts split their opinions more evenly.

Net effect of tech companies on America

Which of the following statements comes closer to your own view, even if neither is exactly right?
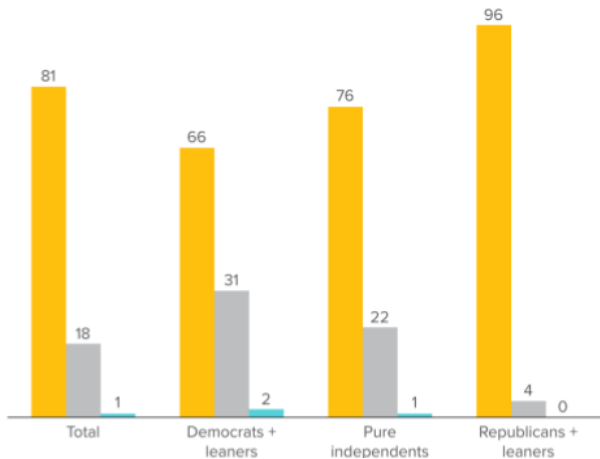
● Technology companies are mostly bad for America, and have too much power that hurts local businesses and threatens people's privacy and free speech rights.
● Technology companies are mostly good for America, and provide good jobs and important products and services that consumers need.

	mostly bad	mostly good
Total	50	50
18 to 29	58	42
30 to 39	47	53
40 to 49	48	52
50 to 64	52	48
65 or older	47	53
Democrats + leaners	24	76
Pure independents	47	53
Republicans + leaners	77	23

Power & influence of technology companies

Big technology companies and social media companies have:

- ● Too much power and influence over politics and government.....
- ● About the right amount of power and influence over politics and government.
- ● Not enough power and influence over politics and government.

	Too much	About right	Not enough
Total	81	18	1
Democrats + leaners	66	31	2
Pure independents	76	22	1
Republicans + leaners	96	4	0

Though partisans arrive at different conclusions about the net effect of technology in American life, voters across the political spectrum agree that big technology companies and social media companies have too much power and influence over politics. Nearly every Republican (96%) and two-thirds of Democrats (66%) say these companies have too much power. Virtually no one we surveyed believes these companies don't have enough power and influence over politics.

The case for and against regulation

Voters are also much more likely to find convincing an argument in favor of regulation compared to an argument against regulation.

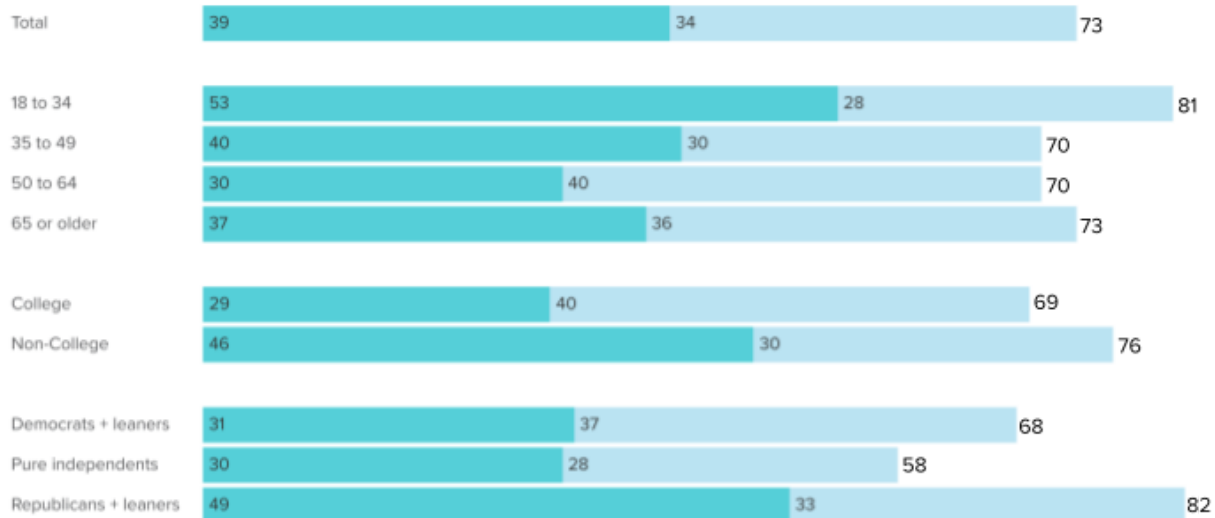An argument to break up tech companies and regulate them more stringently was convincing to 73% of voters (39% very convincing, 34% somewhat convincing).

Arguments for greater regulation of technology

How convincing is this argument FOR regulation of the technology sector?

Big technology companies, like Amazon, Google, and Apple, are monopolies that should be broken up in order to ensure fair market competition and reduce their power. Government should strongly regulate these technology companies to better protect people's private information and to ensure these companies do not abuse their power over the public conversation.

● Very convincing ● Somewhat convincing

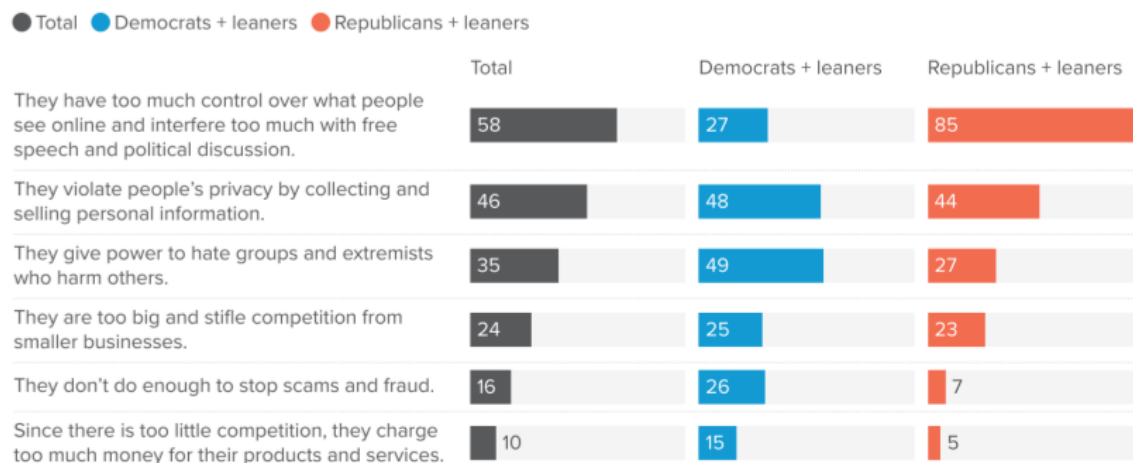|	Very convincing	Somewhat convincing	Total
Total	39	34	73
18 to 34	53	28	81
35 to 49	40	30	70
50 to 64	30	40	70
65 or older	37	36	73
College	29	40	69
Non-College	46	30	76
Democrats + leaners	31	37	68
Pure independents	30	28	58
Republicans + leaners	49	33	82

This argument was convincing to large majorities of voters across age and education lines, but it was especially convincing to 18 to 34 year olds and non-college educated voters. Notably, an 82% majority of Republicans found this argument convincing and nearly half (49%) found it *very* convincing, flying in the face of traditional ideas about conservatism.

Only 10% were totally unconvinced by this argument. We asked the remaining 90% their top two reasons for supporting breaking up and regulating tech companies from a list of six reasons. The top reason was that 'They have too much control over what people see online and interfere too much with free speech and political discussion' (58%) and the second most convincing reason was they 'violate people's privacy by collecting and selling personal information' (46%).

The top reason for regulation is produced by consolidation of Republicans around this answer choice -- 85% of Republicans selected this option compared to 27% of Democrats. For Democrats, the top two reasons for more regulation were because 'they violate people's privacy by collecting and selling personal information' and because 'they give power to hate groups and extremists' with nearly half of Democrats selecting each of these as top two reasons. There were no meaningful differences in the responses of voters based on their familiarity with technology.

Reasons to support greater tech regulation

Which TWO of the following are the primary reasons you would SUPPORT breaking up technology companies and regulating them more stringently?

● Total ● Democrats + leaners ● Republicans + leaners

	Total	Democrats + leaners	Republicans + leaners
They have too much control over what people see online and interfere too much with free speech and political discussion.	58	27	85
They violate people's privacy by collecting and selling personal information.	46	48	44
They give power to hate groups and extremists who harm others.	35	49	27
They are too big and stifle competition from smaller businesses.	24	25	23
They don't do enough to stop scams and fraud.	16	26	7
Since there is too little competition, they charge too much money for their products and services.	10	15	5

Not asked of voters who were not at all convinced by an argument for greater regulation.

The least persuasive argument for greater regulation was '*Since there is too little competition, they charge too much money for their products and services*'; only 10% selected this as a top two option and only 7% of people who rated their personal finances negatively selected it.
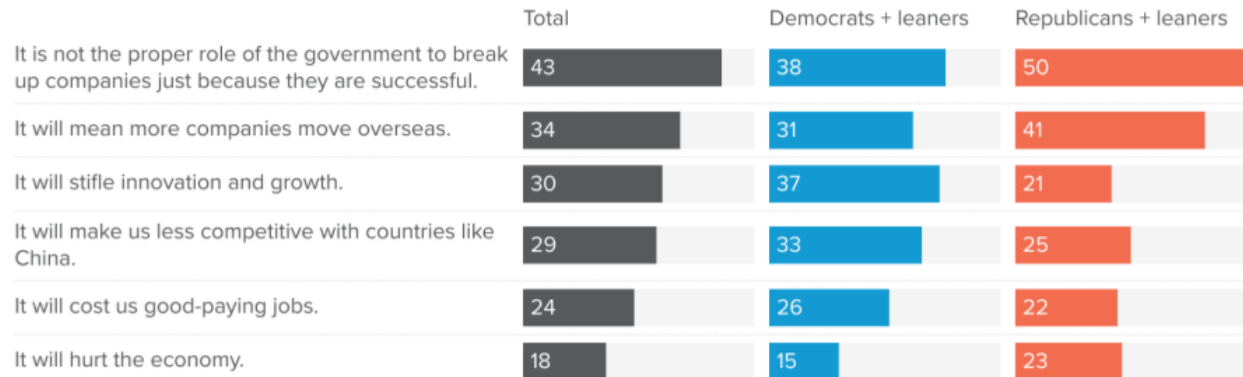
Only 35% of voters find the argument against regulation convincing (10% very convincing, 25% somewhat convincing). The argument read: '*Big technology companies, like Amazon, Google, and Apple, play a vital role in America's economy by creating high-paying jobs, services that help other businesses, and devices that make life easier and more enjoyable for people. These companies are some of the best in the world and should not be heavily regulated by politicians who don't understand technology and will undermine America's competitive advantage against China and other emerging nations.*'

A significant 41% of voters found the argument against regulation totally unconvincing. We asked the remaining voters to identify the top two reasons why they oppose regulation from a list of six options and the most cited reason was that '*it is not the proper role of the government to break up companies just because they are successful*' (43%). The least cited reasons for opposing regulation focused on how it would hurt the economy and cost us good-paying jobs.

Reasons to oppose greater tech regulation

Which TWO of the following are the primary reasons you would OPPOSE breaking up technology companies and regulating them more stringently?

● Total ● Democrats + leaners ● Republicans + leaners

	Total	Democrats + leaners	Republicans + leaners
It is not the proper role of the government to break up companies just because they are successful.	43	38	50
It will mean more companies move overseas.	34	31	41
It will stifle innovation and growth.	30	37	21
It will make us less competitive with countries like China.	29	33	25
It will cost us good-paying jobs.	24	26	22
It will hurt the economy.	18	15	23

Not asked of voters who were not at all convinced by an argument against regulation.

Support for specific proposals to regulate tech companies

In addition to support for regulation in principle, there is strong support for each of the policy prerogatives tested in this survey. Not only do large majorities support each of these policies, but every one of these proposals has the *strong* support of over half of voters.

Support for proposals to regulate technology

These are some proposals that have been put forth in terms of regulation of technology companies. For each one, please indicate whether you support or oppose that particular proposal for government regulation of technology companies.

● Strongly support ● Somewhat support

Make rules to ensure that all internet companies, regardless of size, don't take advantage of consumers by abusing their data, using deceptive and unfair practices, or violating their civil rights.

86	12	98

Ensure that people have the ability to sue a company if their privacy is breached.

74	21	96

Create stronger protections to prevent new technologies from discriminating against people based on personal characteristics (race, gender, disability, religion, etc.) online.

67	24	91

Make it easier for smaller or newer businesses to compete with Big Technology companies by requiring them to open up their data systems or provide fairer terms for small businesses.

52	36	88

Make rules to prevent new technologies, like artificial intelligence or virtual reality, from hurting people before bad things happen, rather than waiting and seeing whether they are scammed, harassed, discriminated against, or otherwise hurt.

51	33	84

Allow states to pass privacy laws that are stronger than the federal baseline law.

52	29	81

Few policies generate such high levels of bipartisan support. Democrats and Republicans are as supportive of each of these policies with one exception: the proposal to allow states to pass privacy laws stronger than federal ones enjoys significantly more support with Republicans compared to Democrats (93% and 68%, respectively).

Support for tech regulation proposals by party

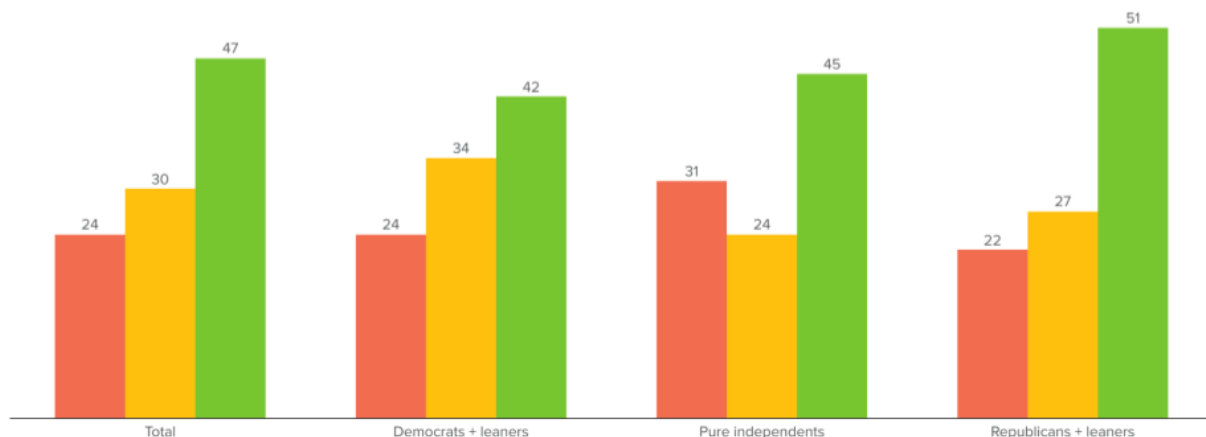| % Support	Democrats+leaners	Republicans+leaners
Make rules to ensure that all internet companies, regardless of size, don't take advantage of consumers by abusing their data, using deceptive and unfair practices, or violating their civil rights.	97	99
Ensure that people have the ability to sue a company if their privacy is breached.	94	97
Create stronger protections to prevent new technologies from discriminating against people based on personal characteristics (race, gender, disability, religion, etc.) online.	96	87
Make it easier for smaller or newer businesses to compete with Big Technology companies by requiring them to open up their data systems or provide fairer terms for small businesses.	89	90
Make rules to prevent new technologies, like artificial intelligence or virtual reality, from hurting people before bad things happen, rather than waiting and seeing whether they are scammed, harassed, discriminated against, or otherwise hurt.	83	87
Allow states to pass privacy laws that are stronger than the federal baseline law.	68	93

Facial recognition technology

When it comes to the use of technology in a law enforcement context, however, voters are more likely to give technology the benefit of the doubt. A 47% plurality of voters believe that the U.S. should continue the use of facial recognition technology which law enforcement uses to analyze public security camera footage. Only 24% believe that this should be banned.

Reaction to facial recognition technology

Some federal, state, and local law enforcement agencies in the United States use facial recognition technology to analyze public security camera footage and try to identify potential criminal suspects. Based on what you know or might have heard about facial recognition technology, which of the following comes closest to your opinion about what the U.S. should do?

🔴 Ban the use of facial recognition technology in the country.   🟡 Pause the use of facial recognition technology.   🟢 Continue the use of facial recognition technology.

	Total	Democrats + leaners	Pure independents	Republicans + leaners
Ban	24	24	31	22
Pause	30	34	24	27
Continue	47	42	45	51

After voters hear about issues with facial recognition technology being faulty and discriminatory, however, 82% support pausing the use of this technology until these problems can be improved. There are high levels of support for a pause across party lines. Black voters were particularly likely to express strong support for a pause (71% of Black voters *strongly* support v. 53% of white voters).

METHODOLOGY

Change Research surveyed 1200 registered voters nationwide from June 7-12.

We used the following sources to recruit respondents:
- *targeted advertisements on Facebook*
- *targeted advertisements on Instagram*

Regardless of which of these sources a respondent came from, they were directed to a survey hosted on SurveyMonkey's website.

Ads placed on social media targeted all adults nationwide. Those who indicated that they were not registered to vote, were terminated. As the survey fielded, Change Research used dynamic online sampling: adjusting ad budgets, lowering budgets for ads targeting groups that were overrepresented and raising budgets for ads targeting groups that were underrepresented, so that the final sample was roughly representative of the population across different groups. The survey was conducted in English.

The survey was commissioned by the Center for American Progress Action Fund and Public Citizen and was conducted online by Change Research. Post-stratification was performed on region, gender, age, race/ethnicity, education, and vote history. Weighting parameters were based on the demographic composition of registered voters and 2020 voters nationwide, obtained from the voter file.

The modeled margin of error* for this survey is 3.7%, which uses effective sample sizes** that adjust for the design effect of weighting.

* We adopt The Pew Research Center's convention for the term "modeled margin of error"(1) (mMOE) to indicate that our surveys are not simple random samples in the pure sense, similar to any survey that has either non-response bias or for which the general population was not invited at random. A common, if imperfect, convention for reporting survey results is to use a single, survey-level mMOE based on a normal approximation. This is a poor approximation for proportion estimates close to 0 or 1. However, it is a useful communication tool in many settings and is reasonable in places where the proportion of interest is close to 50%. We report this normal approximation for our surveys assuming a proportion estimate of 50%.

** The effective sample size adjusts for the weighting applied to respondents, and is calculated using Kish's approximation (2).

(1) https://www.pewresearch.org/methods/2018/01/26/for-weighting-online-opt-in-samples-what-matters-most/
(2) Kish, Leslie. Survey Sampling, 1965.