

January 31, 2022

To: Interested Parties
Fr: Brian Stryker / Luke Martin
Re: Tech Policy ReMesh Findings

Voters like the products tech companies provide, especially those that provide a product they use all the time (Apple, Google), free services that benefit their lives, or (like Amazon) easy, affordable, quick access to the kinds of goods they want. They have some abstract concerns about their size. However, support for purportedly anti-monopoly regulations breaks down when voters hear that those regulations will make their daily lives worse by stifling products they want.

There are real-world items voters **DON'T** want to see the federal government do with over-regulation. These three stood out as not-to-do's:

1. **Don't make it harder for them to get products already hurt by the global shipping crisis.** It's hard enough for them to get consumer goods, and they don't want to interfere with Amazon Prime, especially among college-educated and higher-income groups.
2. **Don't make it harder for them to get around.** They do not want to limit the usefulness of Google Maps by removing it from search results.
3. **Don't put them at risk of scams and hacks.** (Among iPhone owners) Breaking the Apple App Store takes away Apple's ability to screen out apps that scam consumers, steal private information, and make their personal information less secure.

Once swing voters hear about these real-world impacts, most oppose such a broad, sweeping anti-tech bill.

Key Findings

1. **Big tech companies, especially those in the consumer product space, are well-liked.** Swing voters think their innovations make it easier to stay connected and make everyday life easier. They have concerns about social media and social-media companies, but companies that deliver them a tangible good are very popular.
2. **Swing voters think big tech is good for small business.** By a 24-point margin, more people think tech platforms help small businesses by allowing them to reach more customers and keep prices down rather than hurting small business.

Impact Research (formerly ALG) conducted an online qualitative/quantitative hybrid exercise called a ReMesh of 110 likely 2022 swing voters on January 20, 2022. Participants in all had soft opinions of tech companies and included a mix of age, gender, education, race, and Census region.

3. **There is broad, but thin and low-priority, support for the American Innovation and Choice Online Act.** Voters abstractly like the idea of regulating tech companies. However, just over a quarter of swing voters say this should be a “top priority” for elected officials. Voters are looking for things that bring costs down on consumers.
4. **The biggest concerns about big tech are privacy and security, not size and competition.** Privacy and data security are also the main motivations driving support for increasing regulation generally. Only 32% said the size of big tech companies was the best reason to increase regulations on them.
5. **Swing voters do not like the consumer impacts of the American Innovation and Choice Online Act.** More than half say they would be personally affected a lot by regulations preventing Google from integrating its products into search results or Amazon offering 2-day shipping on non-Amazon brand products.
6. **The consumer impacts crater support for the American Innovation and Choice Online Act.** After hearing them, support for the Act is cut nearly in half, from 83% to just 46%.

The following key findings and verbatim excerpts from the ReMesh exercise provide additional context. Every verbatim response also includes the percentage of participants who agreed with that statement.

Current Views of the Tech Industry

- **These swing voters mostly blame the federal government and politicians for rising costs and inflation, not the tech industry.** There is much less blame for the tech industry and they are just as likely to say they don't blame the tech industry at all for inflation as they are to point to the industry raising prices or reducing production. Overall, just 20% of participants say the tech industry bares the most blame.
- **When they are talking about “big tech” they are talking about a mix of social media-driven and product-driven companies.** Mostly when we're talking about big tech they are associating companies like Google, Facebook, Meta, Microsoft, and Apple together.
 - Big tech companies like Amazon, Google, Microsoft, and Apple that provide products are viewed very positively (78% favorable) by participants and more than 3-in-4 (77%) believe they have had a positive impact on society as a whole. Products like smartphones generally, or Apple's MacBook and iPhone specifically, also dominate their responses when asked what they value most from big tech companies.

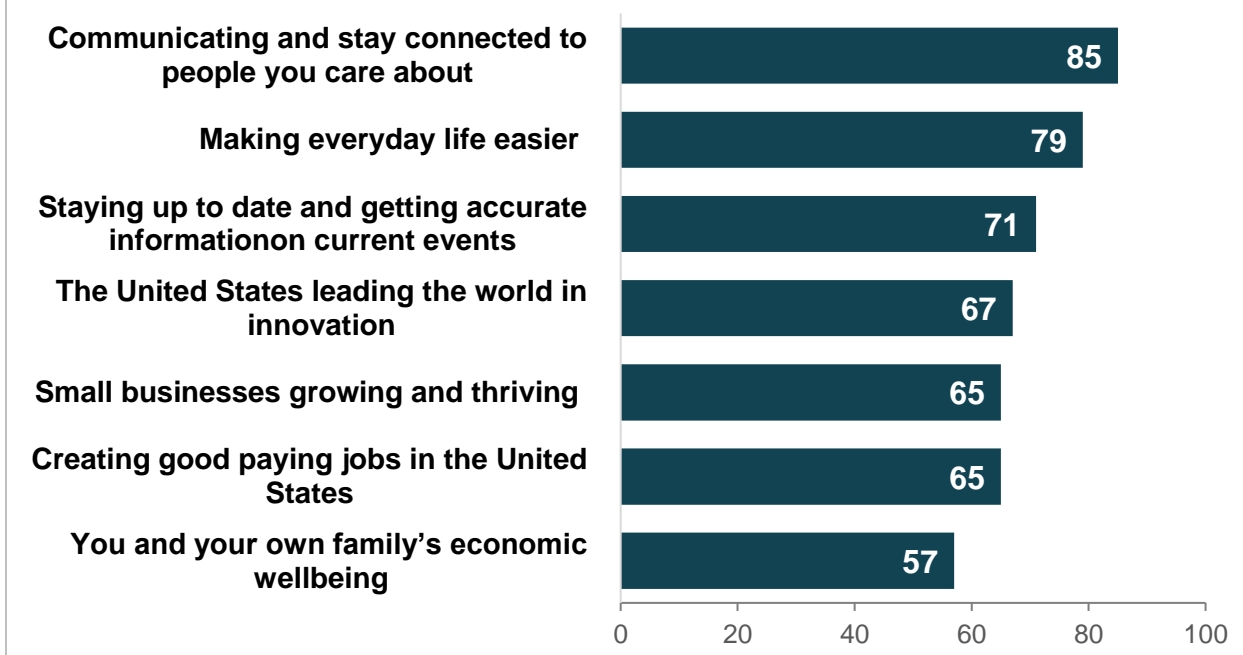
- Voters have a positive but mixed view of social media focused tech companies like Facebook (Meta) and Twitter. These companies’ popularity still leans favorable (58%) and voters narrowly believe these companies have had a more positive (56%) than negative (44%) impact on society.
- **The tech industry overall is first and foremost associated with innovation.** They also understand that because of that innovation the industry is also big and financially motivated. It was not uncommon for individual responses to reference both concepts or express an appreciation for the products and services these companies provide while also being critical of their business practices. This is further illustrated by the below word cloud (bigger words were used more often).

When you think of big tech companies, what word or phrase do you think best describes the industry?



- **They like that big tech has made them able to connect.** The word “connect” specifically was used frequently to describe the value that these companies offer. These participants rated “communicating and staying connected to people you care about” as the reason that makes big tech companies most important.

Here are some different ways that people say big tech companies are important. For each, please rate how important you think big tech companies are for that reason. [% VERY IMPORTANT]

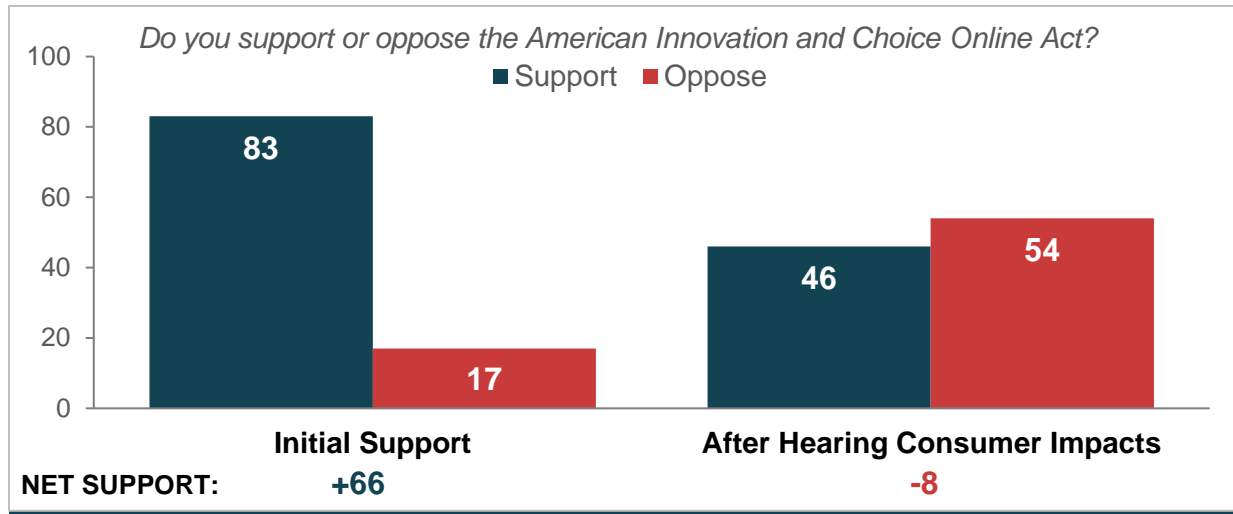


- **Their top concerns about the big tech industry revolve around privacy and information security issues and executive pay.** Looking specifically at the 22 mothers we had in this exercise, the participant responses they agreed with most when asked what they don't like big tech companies was, "privacy concerns" (77% agree) and "can't trust if they protect our privacy" (77%). Overall, the responses that the most participants agreed to in response to this question were:
 - *"Fake and unreliable information" (78% agree)*
 - *"More important for upper management salaries and stock prices than their workers. 10000x average worker salary goes to top executives. Issues with human rights in everyday employees" (75%)*
 - *"Selling personal data, suppression of speech and debate, biased policy" (75%)*
 - *"Data collection, misinformation, cyber harassment platforms" (75%)*

Regulating the Tech Industry

- **People support the American Innovation and Choice Online Act, but it is not a pressing priority and their minds are easily changed.** Overall, 77% of these voters generally support increasing government regulations on big tech companies and 83% support the American Innovation and Choice Online Act. However, only 27% say increasing regulations on the industry should be a top priority for elected officials. Support also melts away after messaging.
- **The main reason driving their general support for increasing regulation is a desire to improve security and protect their personal data.** Only 32% believe the size of tech companies is the best reason to increase regulations. The responses that the most participants agreed with when asked what the best argument for increasing government regulations on big tech companies were:
 - *"To improve security and data usage" (85% agree)*
 - *"The use personal information and data." (85%)*
 - *"To protect our privacy rights and control who has access to our data" (85%)*
- **There are concerns that increasing regulations on tech companies could put a damper on innovation.** In addition to concerns about how the government might implement these regulations in a fair and unbiased way, these swing voters are concerned about the impacts burdensome regulations could have on the continuous cycle of technological innovation that they've come to expect and have benefited from. Overall, 72% say they are concerned that this could allow China to overtake the United States in high-tech innovations, including 69% who identify as Independents.

Impacts of the American Innovation and Choice Online Act



- The consumer impacts of the American Innovation and Choice Online Act would have wide-ranging negative effects and severely limit support for it.** Nearly every swing voter we talked to said one of the eight ways this could affect consumers (a full list can be found in the appendix) would personally affect them a lot. After hearing them, support for the Act drops 37 points, from 83% to just 46%, with a majority (54%) in outright opposition.

Google's search engine, and search engines like it, would no longer be able to operate as it currently does. This Bill would prevent search engines from being able to show you the most relevant results or include any integration with other products run by that company. For example, Google could not show search results or link to directions on Google Maps.

- Limiting search engines, like Google, is the impact swing voters hate the most.** More than half of these swing voters (56%) said this would affect them a lot, it got the highest mean rating as a reason to oppose the Act, and was cited as the outcome that would most negatively impact consumers by participants overall and among those who lost support for the Act throughout the exercise. Participants were especially quick to recognize how Google being forced to decouple products like Google Maps from their search engine would inconvenience their daily lives.
 - “I am a heavy Google maps user, so the example is helpful. When I'm pressed for time, being able to quickly choose the options I need is important to me.” (70% agree)
 - “that we have become dependent on Google maps and we can't get around without it” (70%)
 - “I am a user of Google Maps and this would impact me directly.” (69%)
 - “Google's strength is in integration of its services” (69%)

This type of integration is a stark example of the kind of improvement in their day-to-day lives that they have come to appreciate from big tech companies, and they are not eager to trade it away for the sake of increased regulation.

Under this Bill, Amazon would no longer be able to offer Amazon Prime benefits for products sold by third party sellers. This means unless you are buying something made and sold directly by Amazon, you wouldn't be able to use Prime benefits like free two-day shipping.

- **Voters don't want to lose Amazon Prime benefits for products sold by 3rd party sellers.** Overall, 56% of participants also said this would affect them a lot, and it was the second highest scoring reason to oppose the Act. While Amazon clearly carries some baggage, it's also clear Prime has quickly become a staple in the lives of many through benefits like included expedited (same day, next day, and two-day) shipping. Responses from swing voters in the exercise also repeatedly mentioned how this would not just negatively impact Amazon and consumers, but also smaller, 3rd party sellers.
 - *"This would be bad for third party vendors" (71% agree)*
 - *"I live in an area with limited shopping experiences available, this would impact how I could shop in a huge manner. products would take much longer and we would have much less choice" (68%)*
 - *"This to me is a much bigger deal as it would mean third party sellers wouldn't as easily compete with Prime." (67%)*
 - *"It would disproportionately affect smaller sellers, third parties, etc" (66%)*

Apple would no longer be to control what apps developers are able to get into the Apple App Store. Consumer would lose all benefits of the Apple's App Review system under the Bill and would be opened to the security risks and privacy intrusions from apps that would have previously been filtered out via the App Review system because they didn't meet their standards.

- **Parents (and others) worry about an Apple App Store free-for-all.** Parents in our exercise said this was the outcome that would most negatively impact consumers and 43% of them said it would personally impact them a lot, more than participants overall (38%). This was also seen by many as running directly counter to the biggest overall concern these voters have with big tech because it potentially introduces more security risks for their privacy and personal information.
 - *"This would just make it harder to control privacy" (67% agree)*
 - *"I want apps to be screened to make sure they are legit and safe." (66%)*
 - *"I don't like the Wild West Appmoshere that this would seem to create with limited oversight and review as to what apps are made available on the app store." (64%)*
- **Overall, the American Innovation and Choice Online Act is seen as a step in the wrong direction by most swing voters once they learn the impacts it will have.** They have real concerns about how it could actually do the opposite of what it's intended to – instead reducing innovation, limiting their choices and access to day-to-day conveniences, and opening them up to more privacy and security issues.
 - *"The act will increase security risks for consumers, decrease innovation and progress for tech companies and overall be detrimental to society." (67% agree)*
 - *"It stifles too many activities that have positive impacts. go back to the drawing board and think about both consumers and companies" (66%)*

Appendix – Consumer Impacts

| <i>How much would this personally affect you?</i> | |
|---|----------------|
| | % A LOT |
| Google's search engine, and search engines like it, would no longer be able to operate as it currently does. This Bill would prevent search engines from being able to show you the most relevant results or include any integration with other products run by that company. For example, Google could not show search results or link to directions on Google Maps. | 56 |
| Under this Bill, Amazon would no longer be able to offer Amazon Prime benefits for products sold by third party sellers. This means unless you are buying something made and sold directly by Amazon, you wouldn't be able to use Prime benefits like free two-day shipping. | 56 |
| Smartphone makers would be faced with a choice as a result of this Bill. They could either make phones that only allow their own apps to be installed on them, or they could sell phones without any default apps installed at all, including things like a camera app, mail app, or map app. Either way, consumers would lose access to the amazing standard features that are central features in daily life. | 47 |
| Internet shopping sites could lose the ability to remove fraudulent reviews or rank products higher in search results that have better reviews. Consumers would ultimately lose access to user reviews if platforms could not manage their user review systems. | 42 |
| Consumers would lose access to thousands of products offered by Amazon. This Bill would prevent Amazon from selling Amazon brand products in any category where third party sellers also sold products. | 39 |
| Apple would no longer be to control what apps developers are able to get into the Apple App Store. Consumer would lose all benefits of the Apple's App Review system under the Bill and would be opened to the security risks and privacy intrusions from apps that would have previously been filtered out via the App Review system because they didn't meet their standards. | 38 |
| The Bill would chill tech innovation and curtail investment in research and development for new products. There would be no incentive to develop any new features for a tech platform since they would be presumptively illegal if any other firm wanted to offer a competing product. | 31 |
| Tech companies like Amazon, Facebook, Apple, Google, and Microsoft have all offered programs specifically designed to support Black and minority-owned businesses. Under this bill, such programs would put the platforms at risk of being sued for prioritizing helping minority-owned businesses. | 27 |

| <i>For each of the following, please tell me how convincing this would be as a reason to oppose the American Innovation and Choice Online Act on a scale of 1-10, where 1 is not at all convincing and 10 is very convincing.</i> | | |
|---|-------------------|-------------|
| | % RATED 10 | MEAN |
| Google's search engine, and search engines like it, would no longer be able to operate as it currently does. This Bill would prevent search engines from being able to show you the most relevant results or include any integration with other products run by that company. For example, Google could not show search results or link to directions on Google Maps. | 19 | 7.1 |
| Under this Bill, Amazon would no longer be able to offer Amazon Prime benefits for products sold by third party sellers. This means unless you are buying something made and sold directly by Amazon, you wouldn't be able to use Prime benefits like free two-day shipping. | 30 | 6.9 |
| Internet shopping sites could lose the ability to remove fraudulent reviews or rank products higher in search results that have better reviews. Consumers would ultimately lose access to user reviews if platforms could not manage their user review systems. | 34 | 6.8 |
| Apple would no longer be able to control what apps developers are able to get into the Apple App Store. Consumers would lose all benefits of the Apple's App Review system under the Bill and would be opened to the security risks and privacy intrusions from apps that would have previously been filtered out via the App Review system because they didn't meet their standards. | 31 | 6.6 |
| Consumers would lose access to thousands of products offered by Amazon. This Bill would prevent Amazon from selling Amazon brand products in any category where third party sellers also sold products. | 26 | 6.5 |
| Smartphone makers would be faced with a choice as a result of this Bill. They could either make phones that only allow their own apps to be installed on them, or they could sell phones without any default apps installed at all, including things like a camera app, mail app, or map app. Either way, consumers would lose access to the amazing standard features that are central features in daily life. | 26 | 6.5 |
| Tech companies like Amazon, Facebook, Apple, Google, and Microsoft have all offered programs specifically designed to support Black and minority-owned businesses. Under this bill, such programs would put the platforms at risk of being sued for prioritizing helping minority-owned businesses. | 27 | 6.1 |
| The Bill would chill tech innovation and curtail investment in research and development for new products. There would be no incentive to develop any new features for a tech platform since they would be presumptively illegal if any other firm wanted to offer a competing product. | 24 | 5.7 |