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**THE TARRANCE GROUP**  
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## MEMORANDUM

**TO:** FAIRSEARCH.ORG

**FROM:** DAVE SACKETT  
KATIE HANDEL-SPRENGER

**RE:** FINDINGS ANALYSIS FROM A NATIONAL SURVEY OF VOTER ATTITUDES ON  
ANTI-TRUST LAWS AND THE INTERNET

**DATE:** AUGUST 25, 2012

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The Tarrance Group is pleased to present FairSearch.Org with this analysis of the national survey of voter attitudes regarding the issue of anti-trust laws and the internet.

This analysis is based on telephone interviews with N=800 “likely” registered voters throughout the country. This survey also included an oversample of N=200 self-identified conservative voters, which results in a total overall sample of N=568 self-identified conservative voters. The oversample was then weighted back into the national sample so that all voters by ideology are reflective of the national voting population of registered likely voters.

Responses to this survey were gathered August 12-16, 2012. The margin of error associated with the base sample is  $\pm 3.5\%$ , and the margin of error for the sample of self-identified conservatives is  $\pm 4.2\%$ .

### **Conservative Voters**

A total of N=568 voters were interviewed as part of this study, self identifying as conservative when asked to think about politics and government. Throughout this analysis, when reference is made to the views and opinions of “conservative voters” it is reflective of this entire N=568 subset of interviews. And when this analysis references “all voters,” this is reflective of the conservative oversample being weighted back so the data is reflective of the national voting population.

One-fourth (25%) of all registered likely voters (proportional to voting population) indicate they are a part of or identify with the Tea Party movement. Among the subset of conservative voters, this reaches 48% who identify with the Tea Party.

## Internet Habits

Forty-three percent (43%) of registered likely voters indicate they spend several hours a day on the internet. It is important to note that this question did not ask for any clarification where this occurred – whether at work or in their personal time. Another one-third (35%) of voters are online almost every day. Only 13% of voters are infrequent internet users and 9% non-users of the internet.

When asked for the best description of the type of device used to complete most of their searches on the internet almost a majority (48%) use a computer and one-third (31%) use a laptop. Just 7% of votes use an Ipad or tablet, and 10% use a smart phone.

## KEY FINDINGS

- Throughout the data, there are almost no differences in the views and attitudes of “self-identified conservatives” and the electorate as a whole when it comes to issues of anti-trust laws and the internet. Where differences occur, it is a difference in intensity rather than viewpoints overall.
- Over two-thirds of voters across the country, sixty-seven percent (67%), indicate that they favor enforcing existing anti-trust laws to protect businesses “operating on the internet” from companies abusing a monopoly position to gain competitive advantage.
  - Self-identified conservatives are just as supportive of this effort, with sixty-four percent (64%) of self-identified conservatives indicating that they favor the enforcement of anti-trust laws to protect companies operating on the internet.
- Over a third of voters across the country, thirty-six percent (36%), indicate they believe that the government is not acting aggressively enough to allegations that some companies are violating competition and consumer protection laws. Twenty-seven percent (27%) of voters believe that the government is acting at just the right level, and only 17% believe that the government is acting too aggressively. A plurality of self-identified conservatives also believe that the government is not acting aggressively enough.
- The “uninformed” view of the electorate regarding Google’s monopoly position as a search engine and search advertising marketplace is fairly mixed. Forty-one percent (41%) of voters believe that Google does have a monopoly, while 48% believe that it does not have a monopoly. Communication of the facts that Google currently controls 79% of the online search market in the U.S. and 90% in Europe, and controls more than 95% of searches performed on mobile phones has a dramatic impact increasing views to 67% who are more likely to feel Google has a monopoly position
- Voters across the country, as well as conservatives, express significant levels of concern about a number of the current business practices that Google engages in that reduce competition.

- Fully three quarters of the electorate, seventy-six percent (76%) indicate they believe that Google should be required to be more transparent in revealing how it ranks websites and provide an explanation to businesses that are negatively impacted. A majority of the electorate, fifty-five percent (55%), “strongly” believe this. Sixty-seven percent (67%) of self-identified conservatives also indicate they believe that transparency should be a requirement for Google.
- Seventy-eight percent (78%) of voters across the country indicate they support the current investigation by the U.S. Federal Trade Commission regarding allegations that Google has violated antitrust and consumer protection laws. Only sixteen percent (16%) of voters oppose this investigation. Conservatives are also supportive of the FTC investigation, with sixty-nine percent (69%) of self-identified conservatives indicating that they support this investigation.
- Finally, voters nationally strongly believe that U.S. law enforcement should take action here in the United States if the E.U. Commission finds that Google engaged in anticompetitive practices and actions that violate the law. Seventy-two percent (72%) of all voters across the country, (and 64% of self-identified conservative voters) believe that U.S. law enforcement should follow suit and take action to stop these same Google practices in the United States.

## **SURVEY FINDINGS**

### **Search Engine Competition**

When asked how they would describe the current level of competition among search engines, a significant two-thirds (68%) of voters feel there is enough competition. Further, over one-third (37%) of all voters feel strongly that there is enough competition.

- A six-point gender gap occurs between men (65%) and women (71%) who feel there is enough competition. The “enough” opinion among women is driven by employed women (74%), women under 55 years old (75%), women who have graduated college (73%) and Democrat women (73%).
- Enough opinion increases with age where just 61% of voter 65 or older feel there is enough competition among search engines, this increases to 68% among those 45-64 years old and 72% among those under 45 years old. There is a similar age correlation to the level of unsure opinions with 26% of those 65 or over who are unsure.
- There are no differences between conservative and moderate/liberal voters in their view of competition among search engines, although interesting to note that the feeling there is enough competition is slightly higher among those who are somewhat conservative (73%).
- There are limited drivers of the “not enough” opinion and the significant differences in opinion are between those who say “enough competition” and those who are “unsure.” Men are slightly more likely to feel there is not enough competition (21%) along with men under 55 years old (24%).

When asked to think about laws that protect competition, two-thirds (67%) of voters favor enforcing existing antitrust laws to protect new and small businesses operating on the internet from companies abusing a monopoly position to gain a competitive advantage. Further, 41% feel strongly that antitrust laws should be enforced. Only 15% of voters oppose enforcing antitrust laws to protect businesses operating on the internet.

- Voters show universal favorability toward enforcing existing antitrust laws to protect internet businesses. Differences in opinion are between those who favor and those who are unsure. There are no significant drivers on favor or oppose opinions. Slightly more likely to favor enforcing existing antitrust laws are Democrats over 55 years old (72%) and moderate/liberal Democrats (72%).

### **Google and Monopoly Positioning**

Almost a majority (49%) of voters would say they are extremely or very familiar with Google, including its search engine and online advertising platforms. Another 38% of voters are somewhat familiar and just 13% are not at all familiar with Google.

- Familiarity with Google is highest among younger voters and also increases among those with moderate or liberal ideologies. Forty-two percent (42%) of those over 45 years old are somewhat familiar with Google, whereas among those voters 18-44 years old 26% are extremely familiar, 40% very familiar and just 31% are somewhat familiar.

Respondents were asked to consider two viewpoints about Google. “Some people say that when I use a search engine, I can easily choose an alternative to Google. Other people say while there may be alternatives, I feel the only real choice I have is Google when I search for something online.” Given these options, two-thirds of voters (65%) feel they have alternative choices to Google. Only 27% of voters feel limited in their search options. There are virtually no undecided reactions to these positions with only 8% who feel unsure, both or neither about the options.

- Men, older voters and Republicans drive the view that they have alternative choices to Google. This is more likely to include men (68%), employed men (72%), voters 45-64 years old (69%), college men (73%), Republican (71%), somewhat conservative (71%) and frequent internet users (69%).
- Those driving the view that Google is the only real choice are women, younger voters and Democrats, including employed women (32%), voters 18-34 years old (38%), women under 55 years old (34%), Democrat women (33%), and Democrats under 55 years old (35%). Also more likely to feel Google is the only real choice are non-college men (35%), African Americans (38%) and Hispanic (39%) voters.

Based only on their current understanding of what Google is and does, including the services it provides and the products it offers, voters are almost evenly split on whether Google holds a monopoly position in the search engine and search advertising marketplaces. While 41% feel Google holds a monopoly, 48% feel it does not and only 11% are unsure. Intensity is evenly divided with 26% who feel strongly yes and 25% who feel strongly no.

- Views about Google holding a monopoly closely follow the patterns previously seen in views about alternatives to Google. The coalition of opinions that form will continue to occur throughout this data.
- Belief that Google holds a monopoly is driven by women, younger voters and Democrats. Those more likely to feel that Google holds a monopoly in the search engine and advertising marketplaces are women (46%), employed women (49%), voters 18-34 years old (57%), women under 55 years old (52%), non-college women (52%), Democrat (46%), Democrat women (47%), Democrats under 55 years old (54%) and those with a moderate/liberal ideology (44%).
- Those more likely to feel that Google does not have a monopoly position are men (55%), employed men (60%), voters 35-44 years old (57%), college men (59%), Republican (53%), Republican men (62%), Republicans under 55 years old (56%) and those who are frequent internet users.

However, when told that “Google currently controls 79% of the online search market in the U.S. along with more than 90% in Europe and more than 95% of searches performed on a mobile phone,” two-thirds (67%) of all voters indicate they would be more likely to think that Google has a monopoly position in the search engine market, and 40% feel strongly more likely. Just 19% of voters stay rooted in the view that Google does not, indicating that this information makes them less likely to think Google has a monopoly position.

- There are minimal differences between all voters and conservative voters when informed of the position Google holds in the online search market. Here, conservative voters are just 4-points behind voters overall with sixty-three percent (63%) who feel more likely to view Google as a monopoly and just 23% are less likely when told about the number of searches Google controls.
- More likely to think Google holds a monopoly after being informed are women (72%), those who are not employed (73%), those 65 and older (72%), those without a college degree (76%), Democrats (73%), Democrats under 55 years old (74%), those with a liberal ideology (73%) and infrequent internet users (77%).

Informing voters with a simple message about Google in the online search market is effective in increasing the view that Google holds a monopoly by approximately 25-points. Another way to look at the impact of educating voters about the position Google holds in the online search market is:

<b><i>ALL VOTERS</i></b>	<b>Unaided</b>	<b>Informed</b>	<b>Change</b>
Google does have monopoly	41%	67%	+26
Google does <u>not</u> have monopoly	48%	20%	-28
Unsure	11%	14%	+3

<b><i>CONSERVATIVES</i></b>	<b>Unaided</b>	<b>Informed</b>	<b>Change</b>
Google does have monopoly	38%	63%	+25
Google does <u>not</u> have monopoly	50%	23%	-27
Unsure	12%	13%	+1

The 67% of voters who indicated they were more likely to feel Google has a monopoly after learning about its current control, were asked whether having a monopoly position in the search engine market is something that needs to be reviewed under existing anti-trust laws to prevent abuses. Of those, a significant 71% of voters feel this is something that should be reviewed and almost a majority (48%) feel strongly about this position. However, almost one-fourth (23%) of those who feel Google has a monopoly position do not feel like it needs to be reviewed.

- The cross tabulation of these two questions means that the voting population breaks down as follows after being informed of the Google’s presence in the search market:
  - 47% feel Google holds a monopoly when informed and feel it needs to be reviewed;
  - 5% feel Google holds monopoly when informed and but are unsure about review;
  - 15% feel Google holds monopoly when informed but do not feel needs to be reviewed; and
  - 33% feel Google does not hold a monopoly even with informed message.

So while messages about the number of searches performed is successful in increasing the percentage of voters who feel that Google holds a monopoly (41% to 67%), the view that this needs to be reviewed (ie: concern) is just under half of all voters (47%) with another 48% of voters showing low concern demonstrated by either those who do not feel Google holds a monopoly (33%) or do not feel like the monopoly needs to be reviewed (15%).

This is an early indication that voters need to receive educational messages not only on the position that Google holds but also on why there is reason for concern.

**Views of Google**

In order to test the reactions to fundamental arguments about Google, the services it provides and the products it offers, respondents were read a list of statements that have been made recently about Google. For each one, voters indicated whether they agreed or disagreed with the statement.

- As shown in the chart below, voters across the country, as well as conservatives, a majority of voters agree with statements about the current business practices that Google engages in that reduce competition. In each case, conservative voters are approximately 5-points behind voters overall in agreement.

<b><i>ALL VOTERS</i></b>	<b>Agree</b>	<b>Disagree</b>
The display of Google’s search engine results are manipulated to the advantage or disadvantage of certain sites and companies, including companies that advertise on Google and Google’s own product sites.	59%	25%
Google favors its own products and services when it displays search results.	67%	19%
Google changes its search formula to intentionally disadvantage competitors who provide what many believe to be better products and services.	54%	30%

<b>CONSERVATIVES</b>	<b>Agree</b>	<b>Disagree</b>
The display of Google’s search engine results are manipulated to the advantage or disadvantage of certain sites and companies, including companies that advertise on Google and Google’s own product sites.	53%	27%
Google favors its own products and services when it displays search results.	62%	20%
Google changes its search formula to intentionally disadvantage competitors who provide what many believe to be better products and services.	54%	28%

Using a split sample format, both positive and negative construct of each message were tested in order to understand the true strength – not just general agreement with how it was positioned. The chart below shows the results to this question series with both formats among all voters and reveals that Google does not have much for deep negatives. Voters need information in order to secure their opinions; they are persuadable by either a positive or negative construct to the messaging which indicates they do not have a deep understanding of the situation.

<b>Positive Construct</b>	<b>Agree</b>	<b>Disagree</b>	<b>Net</b>		<b>Net</b>	<b>Disagree</b>	<b>Agree</b>	<b>Negative Construct</b>
<b>Google provides neutral and fair search results that try to answer consumer questions in the best way.</b>	<b>79%</b>	<b>15%</b>	<b>+64</b>	<b>G O O G L E</b>	<b>+34</b>	<b>25%</b>	<b>59%</b>	The display of Google’s search engine results are manipulated to the advantage or disadvantage of certain sites and companies, including companies that advertise on Google and Google’s own product sites.
Google provides unbiased search results, it does not promote its own products over competitors.	52%	33%	+19	<b>A N T I</b>	<b>+48</b>	<b>19%</b>	<b>67%</b>	<b>Google favors its own products and services when it displays search results.</b>
Google uses a consistent search formula that it applies to all sites, including its own, so that all competitors have a level playing field based on product quality.	55%	28%	+27	<b>N E U T R A L</b>	<b>+25</b>	<b>29%</b>	<b>54%</b>	Google changes its search formula to intentionally disadvantage competitors who provide what many believe to be better products and services.

- As shown in the comparison chart above, voters are more likely to believe Google provides a fair search but that Google also favors its own products. While willing to give Google the benefit of doubt on neutral search results, it also makes sense that voters are more likely to believe a company may favor its own products. And when it comes to search formulas, voters are open to messaging and really have no solid opinion, moving to believe what they are hearing either positive or negative.

The more instructive indicators of where voters need to receive messaging comes from a series of more definitive and authoritative messages where respondents were read a list of statements made by **competitors and government law enforcement agencies**. Using a scale of 0 to 10, where 0 means it is "not at all concerning" and 10 means it is "extremely concerning," respondents indicated how concerned they were personally about each statement based on their current understanding of what Google is and does, and the products it offers.

As previously shown, voters are willing to give Google the benefit of doubt on neutral search results while at the same time they feel Google may favor its own products. The chart below highlights that the bigger problem occurs when examining concern over both of these issues. Without an understanding of how these biased results hurt them personally, voters show a low level of concern about Google favoring its own products or the neutrality of search results.

Personal Concern Message	Mean Score	Extremely/ Very (7-10)	Somewhat (4-6)	Not at all (0-3)
Google favors its own products and services when it displays search results.	4.94	33%	34%	30%
Google changes its search formula to intentionally disadvantage competitors who provide what many believe to be better products and services.	4.90	30%	36%	31%
Google has <u>refused</u> to comply with a legal demand by the Texas Attorney’s General office for documents required as part of the state’s ongoing investigation into the company’s business practices.	5.98	44%	29%	20%
Google paid a half a billion dollars as part of a settlement with the U.S. Attorney’s Office in Rhode Island after a sting operation determined that Google was knowingly abetting the illegal sales of drugs online and that company executives, including the current CEO, were aware of this activity.	6.83	58%	18%	17%

- Generally a mean score above 7.0 indicates a significant level of concern. As shown in the chart above, voters have a fairly low level of concern when told that Google does favor its own products in search results and changes its search formula. Even when told of the ongoing investigation by the Texas Attorney’s General office, voters creep closer to an average concern of 6. We see that is it not until Google has actually been convicted of illegal activity does the concern reach closer to 7.0 average response.

While voters show a low level of concern about Google favoring its own products or the neutrality of search results, when tested as a fairness issue for those businesses that are impacted voters believe strongly that Google should be more transparent. When told that some businesses are concerned that there is nothing they can do if Google changes its search formula and it negatively impacts their position in search results, three-fourths (75%) of voters believe that Google should be required to be more transparent in revealing how it ranks websites, including providing businesses who are negatively impacted assistance or an explanation.

- With universal agreement that Google should be required to be more transparent in how it ranks websites, there are limited drivers of opinion. Slightly more likely to agree with this contention are voters without a college degree (80%), Democrats (82%), those with a liberal ideology (88%) and infrequent internet users (86%). Among conservative voters, belief that Google should be required to be more transparent is 8-points less at 67%, with 26% who feel Google should not be required.

### **Government Reaction**

By a two-to-one margin, the government is viewed as not reacting aggressively enough when it comes to allegations that some companies are violating competition and consumer protection laws in the search engine and online advertising. While 17% feel the government is reacting too aggressively, 36% feel the government is not aggressive enough. However, this is another indication that voters need to receive educational messages, as they really are not sure about government involvement or the issue of antitrust law. Here 27% feel the government is reacting just right and a significant 21% are admittedly unsure.

- It is important to remember that in the context of other survey findings, voters are relatively uninformed and unaware of internet competition, violations, or antitrust laws. Opinions about government reactions appear to be largely based on a fundamental belief about government and less about actual actions.
- Conservative voters, by a 10-point margin, are more likely to feel the government is reacting too aggressively to allegations (27%) and 9-points less likely to feel the government's reactions are not aggressive enough (28%).
- The opinion that the government is reacting too aggressively is driven by older voters, women and conservative voters. Those more likely include non-working women (22%), voters 65 or older (21%), women over 55 years old (22%), Republican (27%), Republican women (30%), Republicans over 55 years old, and those who identify strongly with the tea party (40%).
- Those who feel the government is not reacting aggressively enough include non-working men (44%), voters 65 or older (42%), African American (48%), Hispanic (52%), Democrat (44%), male Democrats (47%), Democrats over 55 years old (48%), and those with a liberal ideology (45%).

## **Enforcement Options**

Respondents were informed that “over the past five years, Google’s business practices have come under investigation by the U.S. Department of Justice, the U.S. Federal Trade Commission, the Federal Communications Commission, multiple State Attorney’s General, and multiple government and regulatory authorities in Europe and Asia.” Hearing this information, 63% of voters indicate this gives them a less favorable impression of Google. It is interesting to note that 21% of voters volunteer that this information would have no impact on their impressions of Google.

- Although there are very few drivers, gender differentiates opinions the most. There is a 15-point gender gap with 55% of men and 70% of women who feel less favorable toward Google. And those who feel the investigation would make no difference in their impressions of Goggle are 9-points more likely to be men (26%) compared to women (17%).

After being informed of investigations into Google’s business practices, respondents were asked to consider three different types of investigation and action by enforcement bodies. The chart below shows the level of support for each type of investigation.

<b>Type of Investigation (ranked)</b>	<b>Favor/Yes</b>	<b>Net Diff</b>	<b>Oppose/No</b>
The U.S. Federal Trade Commission is currently investigating allegations that specific Google business practices violate antitrust and consumer protection laws. Do you favor or oppose the investigation?	77%	+61	16%
If the European Commission finds that Google engaged in anticompetitive practices and actions that violate the law, harming consumers and entrepreneurs, should U.S. law enforcement authorities follow suit and take action to stop these same Google practices?	72%	+52	20%
Should Congressional committees actively investigate Google business activities and ensure adequate oversight to protect consumers and small businesses?	64%	+33	31%

- There is strong support (77%) for the current investigation by the U.S. Federal Trade Commission into allegations that specific Google business practices violate antitrust and consumer protection laws. Eight-points behind, 69% of conservative voters support the current investigation by the U.S Federal Trade Commission.
  - With strong overall favorability and few opinion drivers, only Democrats (83%), those with moderate/liberal ideologies and Hispanic (82%) voters are slightly more likely to favor the FTC investigation.
- Knowing that the European Commission is also conducting an investigation into allegations that Google’s business practices violate competition and consumer protection laws, 72% feel that if the European Commission finds that Google engaged in anticompetitive practices and actions that violate the law, harming consumers and entrepreneurs, U.S. law enforcement authorities should follow suit and take action to stop these same Google practices.

A majority (50%) of voters feel strongly that U.S. law enforcement should follow suit and take action. Sixty-nine percent (69%) of conservative voters support the U.S taking action if the European Commission finds violations.

- With more than seven-in-ten voters who feel the U.S should take action if the European Commission finds violations, only women (76%), voters 18-34 years old (79%), non-college men (80%) and non-college women (87%), African American (88%), Hispanic (80%), Democrats (80%) and those with a liberal ideology (82%) are more likely than voters overall.
- Of the three investigative bodies, the weakest response is to the involvement by Congress. It is noteworthy that even here, almost two-thirds (64%) of voters feel Congressional committees should actively investigate Google business activities and ensure adequate oversight to protect consumers and small businesses and 43% feel strongly. However, there is pushback on Congress getting involved. Almost one-third (31%) of voters do not think Congress should get involved and 23% feel strongly. A simple majority (56%) of conservative voters believe a Congressional committee should actively investigate, which is 8-points lower than voters overall.
  - Demonstrating a consistent coalition of opinion drivers, those more likely to feel the Congressional Committee should investigate are women (68%), non-working women (70%), voters 18-34 years old (71%), non-college men (71%) and non-college women (82%), African American (79%), Democrats (72%) and those with a moderate/liberal ideology (71%).

### **Increasing Support for Investigating Google**

Respondents were read a list of statements that have been made recently about Google. For each statement, voters indicated whether knowing about this would make them more likely or less likely to support further investigation of Google. The results are profiled in the chart below.

<b>Impact on Support for Further Investigation of Google (ranked)</b>	<b>More Likely</b>	<b>Net Diff</b>	<b>Less Likely</b>
Though the company claims to value openness and transparency, Google uses its monopoly power to prevent online advertisers from using other advertising platforms.	65%	+42	23%
Though it claims that its online advertising prices are set by the free market, Google controls search advertising pricing and can make it more costly or difficult for competitors to buy advertising to reach consumers.	65%	+41	24%
Though it claims to be an impartial arbiter of search for consumers, Google search results are not fair. The company manipulates its search formula to steer users to its own products at the expense of competitors, even those with objectively better product offerings.	63%	+39	24%

- By stating the impact that each action has on voters or competition, these messages demonstrates the potential to impact views of Google.

## Appropriate Action to be taken Against Google

Voters were asked to consider a list of steps consumers and small businesses have proposed taking against Google. As shown in the chart below, voters indicated whether they would support or oppose each action.

<b>Support for Action</b> <i>(ranked)</i>	<b>Support</b>	<b>Net Diff</b>	<b>Oppose</b>
Strict enforcement of existing antitrust laws.	78%	+62	16%
Oversight to ensure that Google does not use its monopoly power to prevent online advertisers from doing business with other online advertising platforms.	72%	+48	24%
Oversight to ensure that Google does not deceptively or unfairly promote its own products over competitors.	69%	+43	26%
Oversight to ensure that Google does not actively disadvantage innovative competitors by pushing them down in search results where they are less likely to be seen by consumers.	69%	+42	27%

- With the strongest support for action coming from “strict enforcement of existing antitrust law,” this represents across the course of the survey an 11-point increase from the 67% who initially favored enforcement of existing antitrust laws to protect businesses operating on the internet to universal agreement (78%) to strict enforcement of existing antitrust law.

<b>ALL VOTERS</b>	<b>Favor</b>	<b>Unsure</b>	<b>Oppose</b>
Enforce existing antitrust to protect <i>(initial)</i>	67%	18%	15%
Strict enforcement of existing antitrust <i>(informed)</i>	78%	6%	16%
Change	+11	-11	--

<b>CONSERVATIVES</b>	<b>Favor</b>	<b>Unsure</b>	<b>Oppose</b>
Enforce existing antitrust to protect <i>(initial)</i>	63%	19%	18%
Strict enforcement of existing antitrust <i>(informed)</i>	72%	7%	21%
Change	+9	-12%	+3

- For a message of preventing future government regulation, there is universal agreement and no significant drivers of support. Opinions are consistent by age and gender, and even by ideology conservatives are at 72% support and moderate/liberals are only slightly stronger at 83%.

Finally, voters were read a statement that some people agree with and others disagree with, and asked for their reaction. “*Fairly enforcing existing antitrust laws now, means we will be able to head off future government regulation and still ensure the most free, fair markets in the world.*” There is strong agreement among all voters at 77% and 38% who strongly agree. Only 19% of voters disagree and 5% are unsure. For a message of preventing future government regulation, there is universal agreement and no significant drivers of support.

- Opinions are consistent by age and gender, and even by ideology conservatives are at 75% support and moderate/liberals are only slightly stronger at 79%.

## Conclusions

- Voters demonstrate strong agreement with the following:
  - The monopoly position held by Google needs to be reviewed.
  - Google should be required to be more transparent.
  - The U.S. Federal Trade Commission should investigate.
  - If European Commission finds that Google engaged in anticompetitive practices and actions that violate the law, action should be taken.
  - Fairly enforcing existing antitrust laws now will head off future government regulation.
  
- Voters need to receive educational messages not only on the position that Google holds but also on why there is reason for concern.
  - Informing voters with a simple message about Google's position in the online search market is effective in increasing the view that Google holds a monopoly by approximately 25-points.
  - Concern about Google holding a monopoly position is just under half of all voters feeling that this needs to be reviewed. The other half of voters show low concern demonstrated by either those who do not feel Google holds a monopoly even after messaging or do not feel like the monopoly needs to be reviewed.
  
- Voters need information in order to secure their opinions. They are persuadable by either positive or negative messaging which indicates they do not have a deep understanding of the situation. Further, they need messages on why they should be concerned about the current situation and how it impacts them personally.

###