



Decoding the Net Neutrality Debate

MEDIA, PUBLIC COMMENT AND ADVOCACY
ON THE OPEN INTERNET

 **Knight Foundation**

THE NET NEUTRALITY DEBATE

The debate over regulation of the Internet may be one of the most important of our day. Companies that have invested billions in Internet infrastructure contend that they need the ability to manage their networks, prioritizing some content over others to maintain service, and charging for higher speeds.

Advocates of [net neutrality](#) see the Internet as a utility, essential for individual learning, working, civic participation and free expression, as well as economic competition and innovation – too important to have fast lanes and slow lanes, with the fastest speeds going to the highest bidder.

The debate intensified this year, when the Federal Communications Commission invited public comment on new proposed regulations

that stop short of the standards demanded by net neutrality advocates. The call elicited 3.7 million comments, as well as a storm of debate on Twitter and an avalanche of press coverage. Subsequently, President Barack Obama aligned with net neutrality supporters, but the new rules remain to be written.

The technical complexity of Internet regulation, and lack of direct historical precedent, make it difficult to engage the public in an informed debate and develop regulations that will remain effective over time. To tackle these challenges, both policymakers and citizens need to better understand public opinion, amid a torrent of organized advocacy from both sides. Knight Foundation partnered with Quid, a data analytics firm, to separate the signal from the noise.

KEY PLAYERS

The Federal Communications Commission regulates interstate and international communications in the United States and its territories. Its issuance of an order in 2010 aimed at preserving the open Internet precipitated a lawsuit by telecommunications company Verizon. This year an appeals court vacated portions of the order, setting the stage for the FCC to draft new rules and invite public comment.

Internet service providers and telecommunications companies provide the means—the pipelines—that connect the Internet to homes and businesses. They invest in cable and wireless networks that facilitate access and seek to recoup those costs and generate profits by providing services to the public and other customers. They include companies such as AT&T, Comcast, Verizon and Time Warner Cable.

The public uses connections provided by Internet service providers and telecommunications to access the Internet, which provides global links to family, friends and services.

Startups rely on the open Internet for offering services to customers; pay-to-play regulations that give preferential speed to established companies would inhibit competition.

Technology companies provide services and content to the public. They depend on Internet service providers and telecommunications companies for delivery. They include companies such as Amazon, Google and Netflix, which all deliver entertainment and media to the public.

ANALYZING THE DEBATE

Here are some of the broader questions the analysis raises:

- What is public sentiment related to net neutrality?
- How has net neutrality been covered in the media and discussed on social media? What has influenced the conversation?
- How are organizations and companies attempting to influence the net neutrality debate?

Quid conducted the following research on net neutrality:

- **Media analysis** of more than 35,000 news sources and 300,000 blogs from January to July 2014.
- **Twitter analysis** of 120,000 tweets with #NetNeutrality from July to August 2014 and from #InternetSlowdownDay.
- **Comment analysis** of about 1 million public filings to the Federal Communications Commission.
- **Lobbying analysis** of approximately 2,500 filings from 2009 to the second quarter of 2014 from the U.S. Senate Lobbying Disclosure Act Database.
- **Grant funding analysis** of data for media access and telecommunications companies.



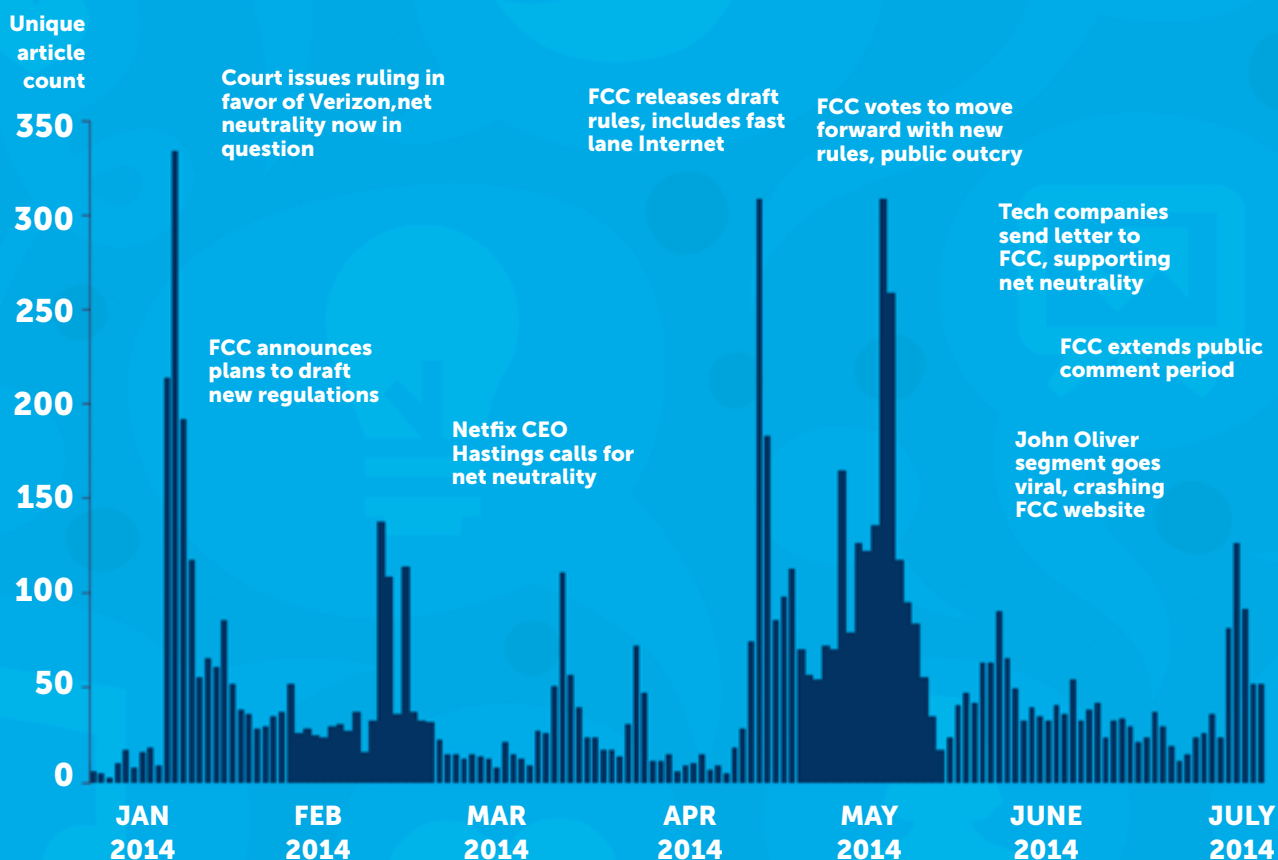
KEY TAKEAWAYS

- **Public opinion was overwhelmingly pro net neutrality.** The main narratives expressed on Twitter and FCC comments favored egalitarianism and fairness: Don't create an Internet of haves and have-nots; treat the Internet like a utility, available for all. Net neutrality was also seen as essential for start-ups to succeed against established companies.
- **Telecom and cable companies chose lobbying over public debate.** They appeared to make only limited efforts to sway public opinion through traditional or social media, instead pouring significant amounts of money into lobbying. Their main narrative focused on the enormous bandwidth used by content providers such as Netflix, who should not get a "free lunch" from companies that have invested billions in building networks.
- **Male and urban voices were overrepresented** in the debate. As for the media, it covered the debate as a tech story and as a political story; local communities were not engaged.

MEDIA COVERAGE OVER TIME

Spikes in news coverage coincide with announcements by the Federal Communications Commission. Over time, more voices have joined the conversation.

Net neutrality news volume from Jan. 1 - July 18, 2014

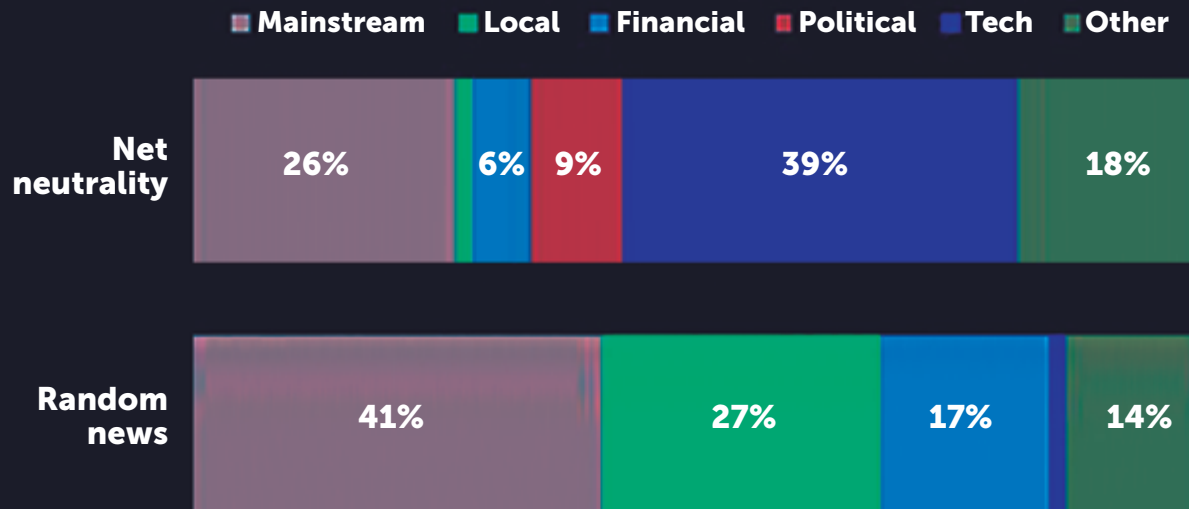


A TECH STORY, A POLITICAL STORY, BUT NOT LOCAL NEWS

Net neutrality was more likely to be covered in media outlets focused on technology or politics, rather than financial or local news.

News volume by source type, top 200 sources Jan-July 2014

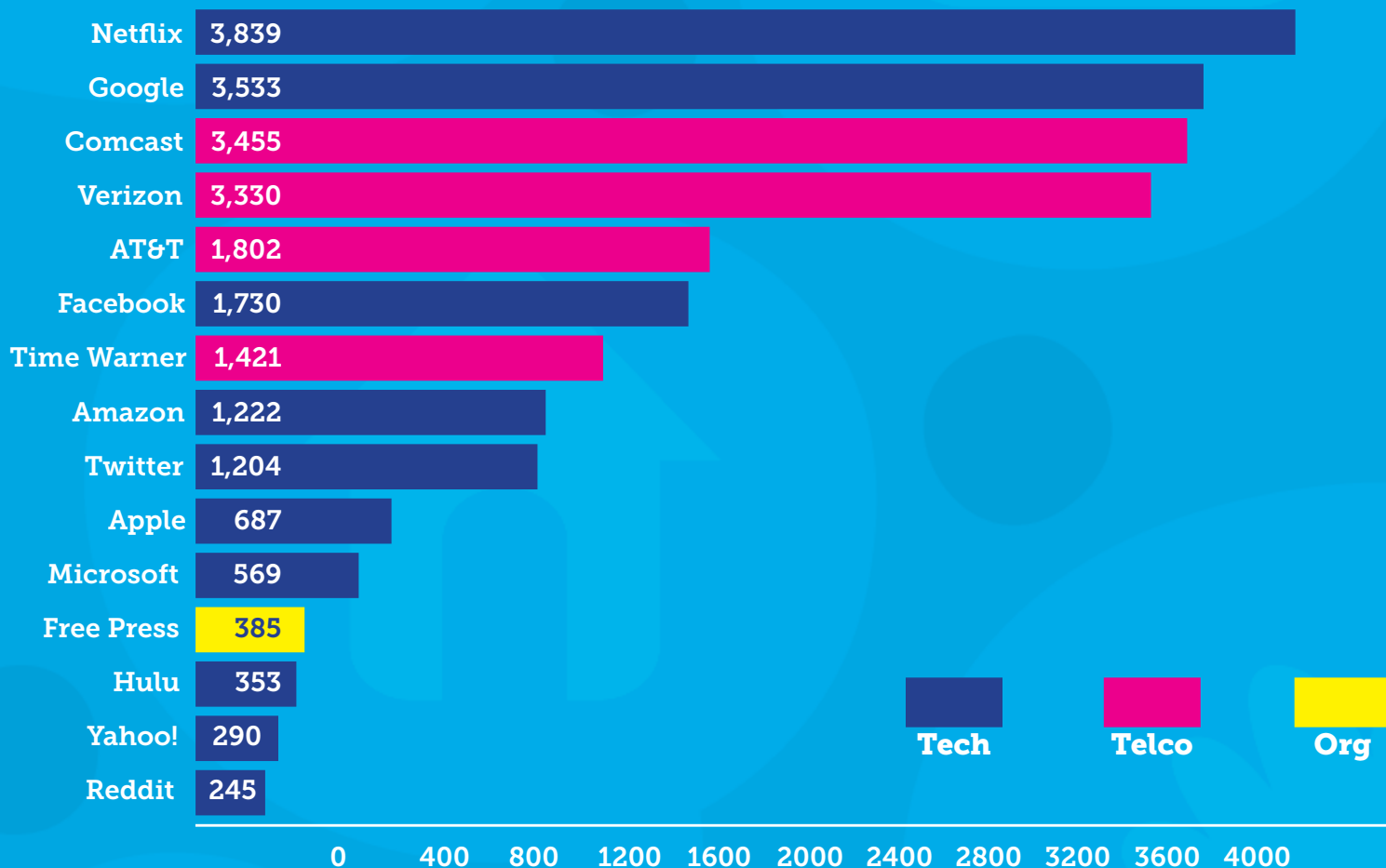
Net neutrality vs. random sampling of news



Note: Other includes sports, entertainment, blogs, magazines, video games and other sources

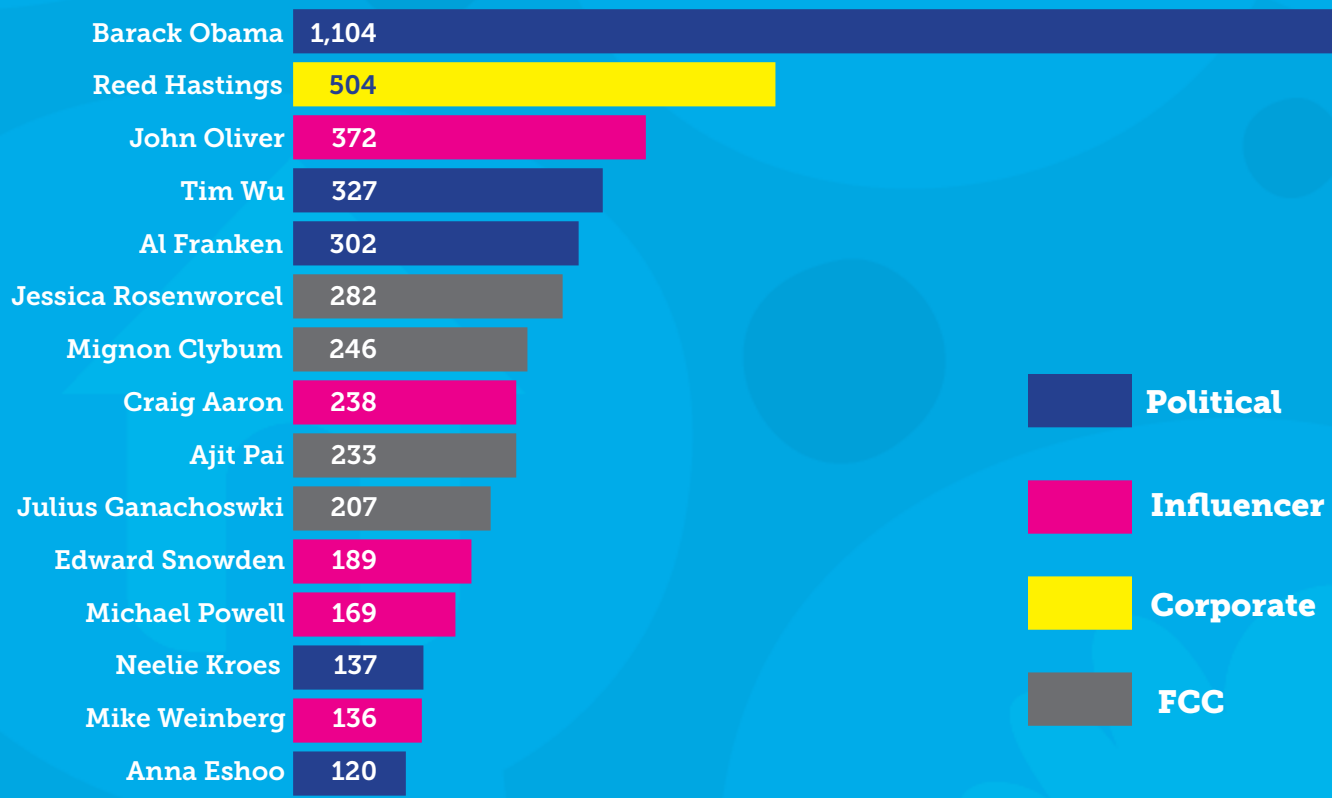
The Players: Companies on both sides of the net neutrality debate were prominently mentioned in news reports.

Top 15 companies by count of mentions



The Influencers: The leading voices cited in news reports favored net neutrality. During the analysis period, President Obama was frequently criticized for his absence from the debate. However, in November he weighed in with a strong statement and video in support of net neutrality.

Top 15 people by count of mentions*



*Tom Wheeler is omitted as he is present in ~3,500 articles surrounding net neutrality

Demographics overview: The readership of media outlets covering the net neutrality debate skews to a wealthier, male audience, with no age bias.

Demographics of net neutrality news, relative to random sample



AGE

0%

50%

100%



INCOME

0%

68%

100%



GENDER

0%

69%

100%

FEMALE

MALE

*Demographic data obtained from a random week of news from July 12 to July 18, 2014

TWITTER NARRATIVES

A central narrative during the period analyzed was that net neutrality stimulates innovation, helping startups compete against established companies. @Kickstarter, for example, tweeted to its 868,240 followers that “When we launched Kickstarter we didn’t need to negotiate a deal for access to the Internet fast lane. We just plugged in. #NetNeutrality”

Advocates of net neutrality were dominant on Twitter. While some shared news and education stories on net neutrality, significantly more tweets analyzed led to advocacy sites, which generally offered templates to submit comments to the FCC.

Women were again underrepresented in the debate. Twitter users from metro Boston, Los Angeles, New York, San Francisco and Washington, D.C., were overrepresented in the conversation.

Based on an analysis of tweets from July to August 2014.



Retweets: Top retweets relate to calls to action, with some commentary and education interspersed

Top tweets by retweet count	User	RT	Favorites
Cable's trying to end #netneutrality & break the internet for profit. 36 hours left to stop em http://t.co/YM... http://t.co/53...	Tim Berners-Lee	6,165	1,799
Last chance to save #NetNeutrality http://t.co/dj... #cablecompanyfuckery /PLS RT! PLS RT! http://t.co/bM...	Cory Doctorow	2,711	608
Your future without #NetNeutrality: http://t.co/R... http://t.co/MV...	BitTorrent, Inc.	2,540	2,026
A lot more people would become passionate about Net Neutrality if we renamed i Operation Porn Freedom	Kumail Nanjani	1,963	2,001
Net neutrality explained: http://t.co/o...	George Takei	1,429	1,190
US Web Companies Press Demands for Net Neutrality With FCC - #TechTongue #Tech #Mobile http://t.co/b...	Tech Tongue	1,357	21
Why the FCC is ditching net neutrality: http://t.co/bM... http://t.co/W...	Mother Jones	1,286	363
FCC Net Neutrality deadline extended to Friday http://t.co/P... http://t.co/TU...	Cory Doctorow	1,238	501

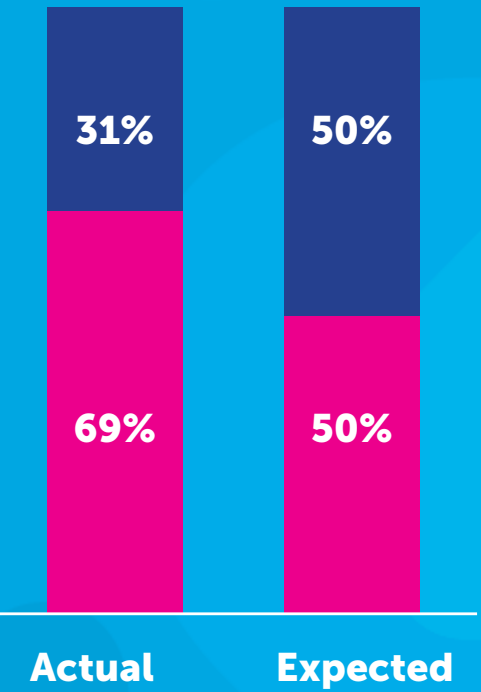
Note: Tweets with at least 1,000 retweets in July and August 2014.



Gender: Women tweeted less than men on net neutrality.



#netneutrality¹



Twitter geography: The top metro areas are driving much of the conversation on Twitter

#NetNeutrality Twitter network



General Twitter network



¹ Based on sample of 20,000 tweets from July 9, 2014 – Aug. 20, 2014.
² Top metros are defined as the New York, Boston, DC, LA and San Francisco areas, and location is based on user input when signing up for Twitter.

FCC COMMENTS ANALYSIS

Commenters on the Federal Communications Commission site overwhelmingly favored net neutrality, according to Quid's sentiment analysis of 1.1 million of the the 3.7 million comments submitted. Many individuals took the time to write — unique comments, as opposed to form emails or advocacy templates — accounted for 40 percent of those analyzed, much higher than the typical 10 to 20 percent.

The largest clusters of comments had the following themes:

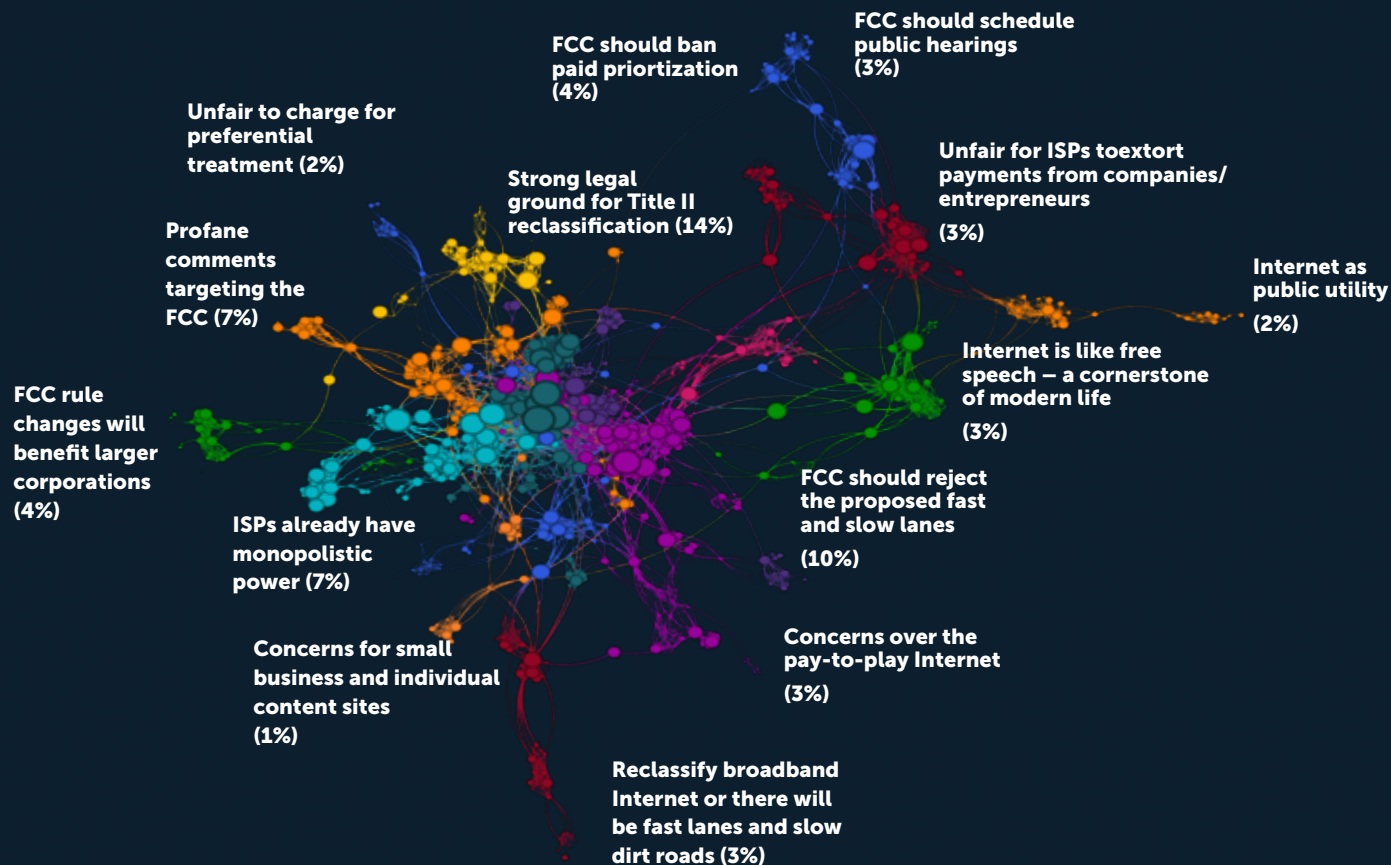
- There is strong legal ground for reclassification of Internet service providers as Title II common carriers
- The FCC should reject the proposed fast and slow lanes on the Internet
- Internet service providers already have monopolistic power

There were anti-net neutrality responses as well, but the only one common enough to register was from a template.

THEMES OF PUBLIC COMMENTS

Individual comments were overwhelmingly pro-net neutrality and quite diverse, though the idea that the Internet should be reclassified as a common carrier for regulatory purposes was central.

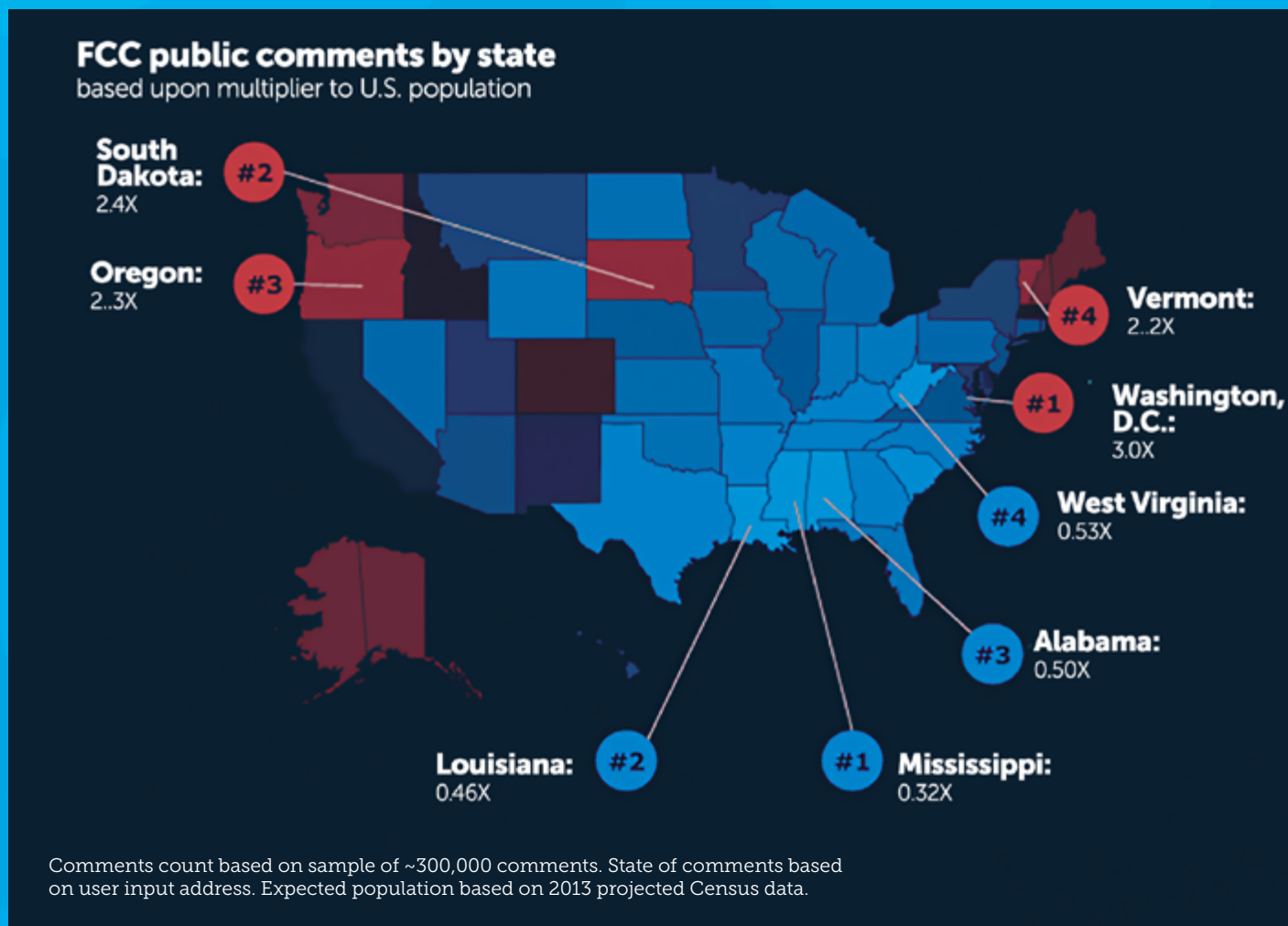
FCC unique comments, colored by topic



Based on Quid's analysis of 1.1 million comments submitted to the FCC. Each node represents a group of similar, unique comments. Comments from templates have been omitted.

TOP PARTICIPATION RATES BY STATE

Many of the unique comments came from Washington, D.C., which was proportionally overrepresented based on its population. The Southeastern United States, however, was underrepresented.



INFLUENCING THE DEBATE

Large Internet service providers, such as Verizon, Comcast and AT&T have largely avoided the public debate, instead seeking influence through lobbying, spending more than \$238 million on filings that mentioned the term “net neutrality” at least once, according to the Quid analysis.

Advocacy groups, particularly pro net neutrality groups, concentrated their outreach through Twitter, using impassioned language to call people to action. These groups have sought to encourage people to submit FCC comments, often even providing templates that break down into three areas:

- Protect the diversity of the Internet: 24 percent (of the templates submitted)
- Schedule public hearings before making a decision: 14 percent
- Reclassify Internet service providers to allow more regulation by the FCC: 14 percent

The only significant anti-regulation template (4 percent) advocated not reclassifying ISPs.

Netflix also has been one of the leading advocates for net neutrality, with its CEO Reed Hastings being a vocal supporter. It has had an effect on the public conversation, with 5 percent of media about net neutrality surfacing around Hastings’ criticism of Comcast and Verizon. The ISPs have responded, saying Netflix shouldn’t expect anything for free, but that is the rare representation of Internet service providers attempting to sway public opinion in the media.

Corporate strategies: In lieu of trying to sway public opinion, corporations are largely focusing their efforts on lobbying.

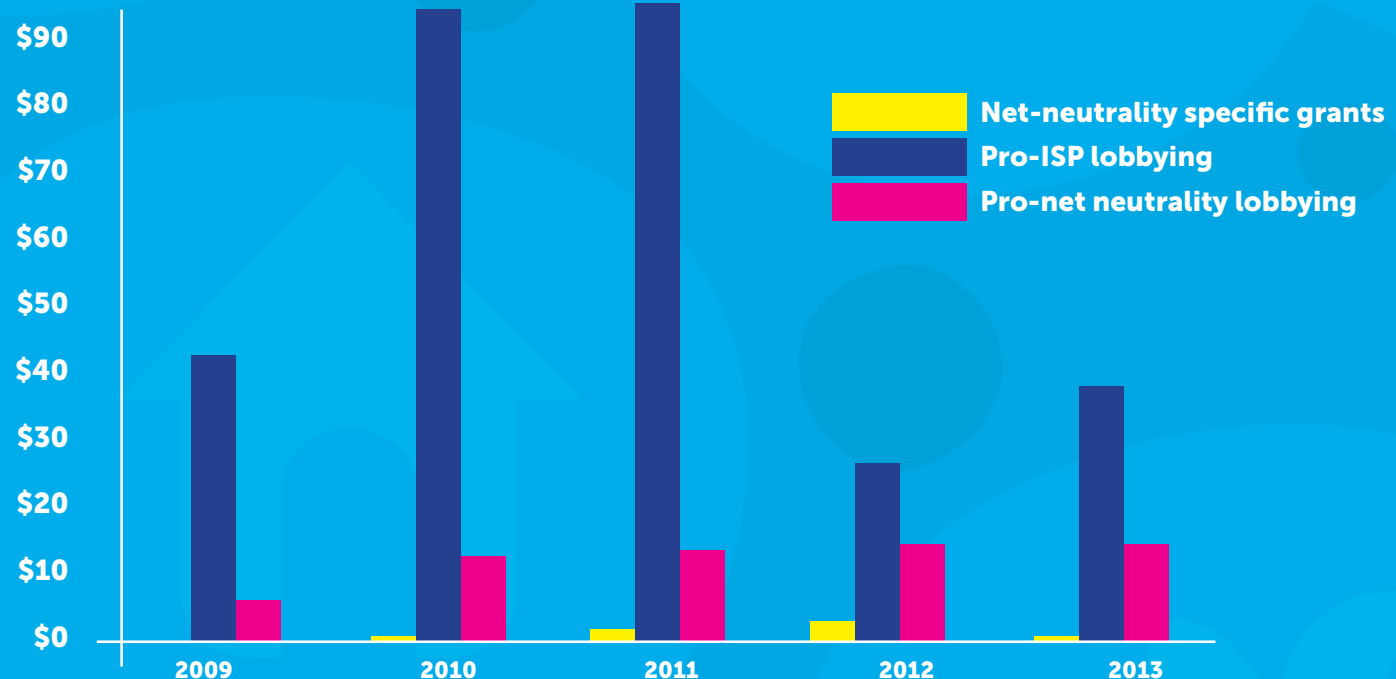
Type	Example Corporation	Lobbying \$s	Influence strategy
Telcos	Comcast	\$83M	Comcast focused on lobbying, but has recently pushed through corporate announcements and advertisements to promote their own open internet philosophy
	National Cable and Tele-communications Association	\$12M	The NCTA is the face of the telecom companies, and has promoted both Google & Twitter ads to push their interests
	Verizon	\$100M	Verizon has focused entirely on lobbying and has made few announcements or public efforts to influence the conversation, except for a few quotes from spokesmen.
Tech Cos	Netflix	\$0M	Netflix has used CEO Reed Hastings to prominently argue for net neutrality while criticizing ISPs. Netflix has made streaming deals with all major ISPs for direct access to their networks.
	Google	\$53M	Google has largely remained in the shadows of the conversation besides signing on with 100 tech companies in support of net neutrality. Recently, they launched the ambiguous "Take Action" showcasing the need for a free and open Internet.



Pro-Internet service provider dollars dwarf spending for both pro-net neutrality lobbying and grants. Lobbying spending peaked in 2010 and 2011. The FCC issued its open Internet order in 2010.

Lobbyist dollars, top 20 clients over time (millions)

2009-2013



Note: Against - Recording Industry Association of America, AT&T, Comcast, National Cable and Telecommunications Association, Verizon, Writers Guild, National Music Publishers, Time Warner, BroadcastMusic, Hughes Network Systems, Frontier Communications, Viacom, Tekelec, Charter.

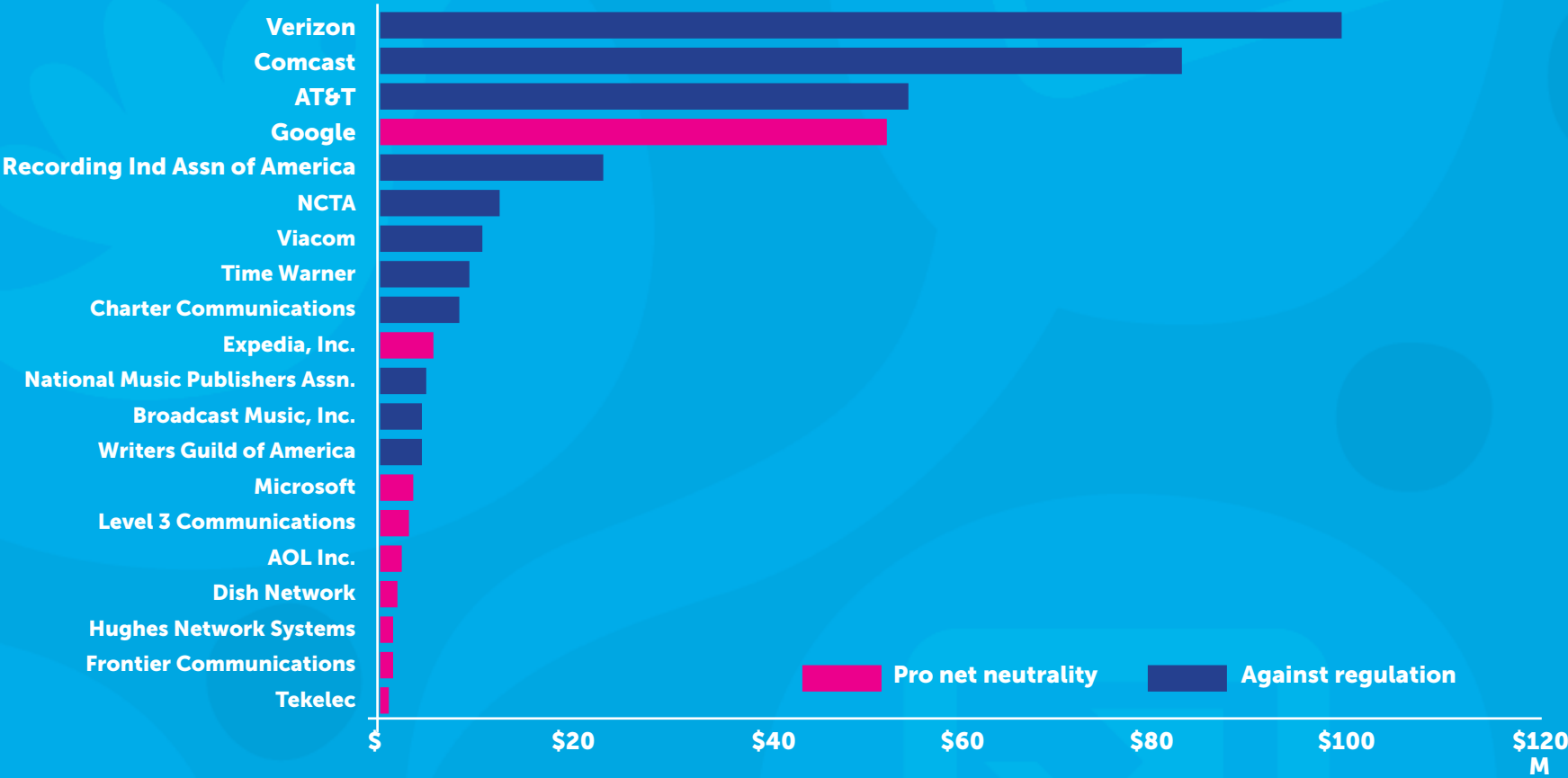
Pro – Expedia, Level 3, Dish, Microsoft, Google, AOL



Lobbying spending: Telecommunications company focus on lobbying to push their interests. Some technology companies, such as Google are becoming more active.

Lobbying spending on filings with at least one 'net neutrality' issue

Q1 2009 - Q2 2014



Top advocacy organizations: Top advocacy groups have a significant and active presence on Twitter and created FCC templates to push their interests.

Organization	Number of followers	Number of tweets*	Count of templates	Pro/Anti regulation	Website language
	232,000	20	84,438	Pro	"Pay-to-play: Internet stifles innovation. These practices pose a dire threat to the engine of innovation."
	165,000	0	50,844	Pro	The Internet thrives because it is an open and free marketplace of ideas. Big Telecom will create a "pay-to-play" system that will unfairly favor large corporate websites.
	50,800	238	11,800	Pro	Battle for the Net: Team Cable vs. Team Internet
	8,671	54	N/A**	Anti	If anything is going to slow down the Internet, it's Title II, the mess of outdated and heavy-handed rules that have been coflated with net neutrality.

*Number of tweets from Aug. 18 to Sept. 17, 2014 containing #netneutrality, net neutrality, #openinternet or Open Internet

**TechFreedom's template was launched after the 1.1M comments were collected

KEY QUESTIONS

Quid's analysis unveils the prevailing narratives and influencers shaping the net neutrality debate. It raises several provocative questions about the future of the open Internet and policy decisions:

- The public voice that has participated in the conversation has overwhelmingly supported net neutrality. How will that affect the final decisions made by the Federal Communications Commission and political leaders?
- The net neutrality debate has been dominated by men and a handful of major metropolitan areas. Since the voices of women and much of the country have not been equally represented, how will this affect the conversation and the policies that emerge? Should efforts be made to bring more voices into the conversation?
- What impact will lobbying have on the future of the open Internet, especially given that more money is devoted to lobbying against net neutrality?

Perhaps most important, we as a democratic society must consider how rules and regulations either protect or restrict our freedoms. At Knight Foundation, we believe that democracy thrives when people and communities are informed and engaged. What are the actions that get us closer to that ideal?

Knight and the Open Internet

Quid's analysis is part of Knight Foundation's commitment to supporting the free flow of information. Knight supports transformational ideas that promote quality journalism, advance media innovation, engage communities and foster the arts. We believe that democracy thrives when people and [communities are informed and engaged](#).

We first convened a panel to explore the issue of digital access in 2008: the [Knight Commission on the Information Needs of Communities in a Democracy](#). A year later the commission released a report "[Informing Communities: Sustaining Democracy in the Digital Age](#)," with recommendations that were largely adopted by the Federal Communications Commission in its own report, "[The Information Needs of Communities: The Changing Media Landscape in a Broadband Age](#)."

More recently, [the first Knight News Challenge of 2014](#) asked, How can we strengthen the Internet for free expression and innovation? Knight received 704 entries in the challenge, an open call for ideas, and in June awarded [almost \\$3.5 million to 19 projects](#). The conversation continued in August during the [2014 Forum on Communications and Society at Aspen Institute](#) where thought leaders explored how Internet regulation would help or hurt the potential of this resource.

[**knightfoundation.org**](http://knightfoundation.org)