



Net Neutrality Survey

2017 Nationally Representative Phone Survey

Prepared by CR Survey Research Department

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INTRODUCTION

In July 2017, Consumer Reports conducted a nationally representative phone survey to assess attitudes towards the Federal Communications Commission (FCC) regulations on internet service provider (ISP) practices, referred to as net neutrality or open internet. Opinion Research Corporation (ORC) of Princeton, New Jersey administered the survey to a nationally representative sample of 1,005 U.S. adult residents through its CARAVAN Omnibus Survey. Respondents were selected by means of random-digit dialing and were interviewed via landline or cell phone. The data were statistically weighted so that respondents in the survey are demographically and geographically representative of the U.S. population.

REPORT HIGHLIGHTS

44%
HIGHLY SATISFIED WITH
THEIR INTERNET
SERVICE PROVIDER

Forty-four percent of those individuals with an internet service provider are highly satisfied with the overall quality of service they receive (15% completely satisfied and 29% very satisfied). A small number report that they are completely dissatisfied (4%). Thirteen percent of respondents indicate that they do not have an ISP.

79%
RELY ON THE INTERNET
5-7 DAYS PER WEEK

Americans are dependent on the internet on a daily basis. Almost 80% say it is necessary five or more days per week to access the internet or use other services provided by their ISP without disruption to carry out their daily activities. The largest group of respondents say they rely on the internet every day (68%).

61%
INTERNET IS AS IMPORTANT
AS ELECTRICITY OR WATER

Americans believe that their internet service is a crucial part of their lives. More than half agree with the statement "internet service is as important as electricity or water service in today's world."

74%
HIGH-SPEED ACCESS IS
THE MOST IMPORTANT
FEATURE PROVIDED BY ISP

Of those with an ISP, nearly three-quarters feel that high-speed access to the internet is the most important feature of having an ISP. Receiving an email address through the ISP or web-hosting services was selected as the most important feature far less frequently (12% and 6%, respectively).

49%
ISPs SHOULD
REGULATE
THEMSELVES

About half of Americans think that it's the ISPs themselves who should be most responsible for protecting the interests of consumers. Forty-two percent say ISPs should be regulated by the government (28% say federal government; 14% say state or local). Only 2% report they do not think ISPs need to be regulated.

57%
SUPPORT
NET NEUTRALITY
REGULATIONS

Over half of Americans say that they support the current net neutrality regulations that prohibit ISPs from blocking or discriminating against lawful content on the internet (31% strongly support; 26% somewhat support). Sixteen percent oppose these regulations, and about a quarter did not express an opinion.

67%
DISAGREE THAT ISPs
SHOULD BE ALLOWED
TO CHOOSE CONTENT

More than half of Americans feel that ISPs should not be allowed to restrict the content consumers receive when accessing the internet. More than two-thirds disagree that ISPs should choose which websites, apps, or streaming services customers can access, while 48% disagree that ISPs should adjust quality and/or speed based on prioritization fees.

FINDINGS

INTERNET USAGE

Respondents were asked to answer a series of questions about their internet service providers, and their use of the internet. They were told to think about the company that provides them with access to the internet and other related services, which may also give them access to cable TV, wireless, or telephone services. If they use more than one provider for these services, respondents were instructed to answer regarding the one that they use most often for internet service.

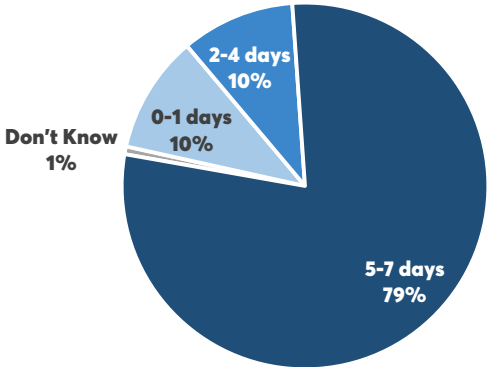
44%
HIGHLY SATISFIED WITH
THEIR INTERNET
SERVICE PROVIDER

Forty-four percent of Americans with an ISP are highly satisfied with the overall quality of service they receive (15% completely satisfied and 29% very satisfied). A small number report that they are completely dissatisfied (4%). Thirteen percent of respondents indicate that they do not have an ISP.

Americans who have an ISP are dependent on the internet on a daily basis. When asked how often it is necessary for them to access the internet or use other services provided by their ISP without disruption to carry out their daily activities, almost 80% said five or more days per week. The largest group of respondents say they rely on the internet every day (68%).

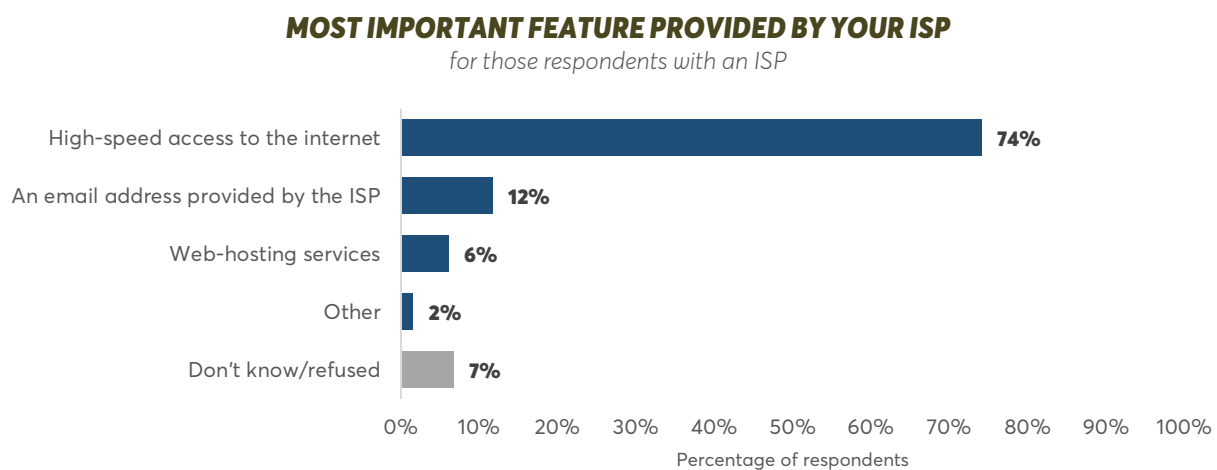
Baby Boomers are less likely than Millennials and Gen Xers to say they rely on the internet most days. Even among this group of older adults, 74% say they need internet access five or more days per week, compared to 84% in the younger age groups.

DAYS PER WEEK PEOPLE RELY ON THE INTERNET
for those respondents with an ISP



Furthermore, many Americans believe that their internet service is a crucial part of their lives. In fact, 61% of Americans agree that "Internet service is as important as electricity or water service in today's world."

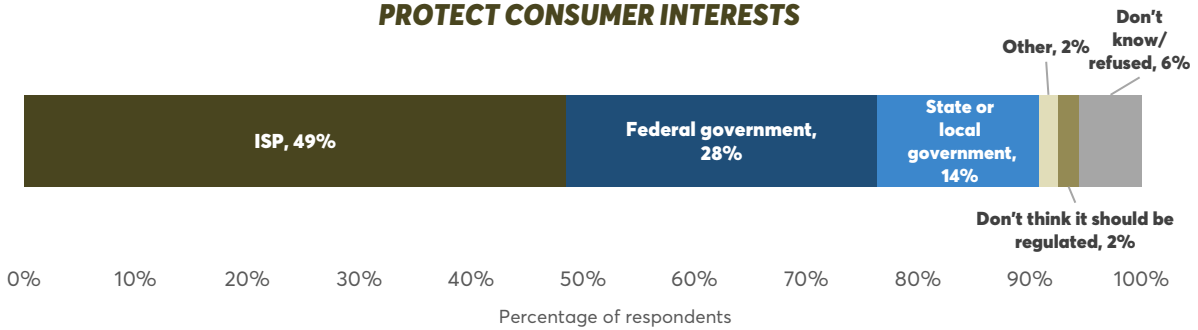
Among those Americans with an ISP, we asked which feature they see as the most important offering from their ISPs: High-speed access to the internet, an email address, or web-hosting services. Not surprisingly, nearly three-quarters of individuals feel high-speed internet is the most important feature of having an ISP. Receiving an email address through the ISP (not through a service such as Gmail) or web-hosting services (for example, for a personal or business website) were selected as the most important feature far less frequently (12% and 6%, respectively).



OPINIONS ON REGULATIONS

When we asked Americans who they think should be most responsible for ensuring that ISPs protect the interests of consumers, the most frequently selected choice was the ISP themselves (49%). Forty-two percent of Americans say ISPs should be regulated by the government (28% say federal government; 14% say state or local). Only 2% report they do not think ISPs need to be regulated.

WHO SHOULD BE MOST RESPONSIBLE FOR ENSURING THAT ISPs PROTECT CONSUMER INTERESTS



There are significant differences in who individuals believe should be responsible for regulating ISPs by gender, age, and political party affiliation. Women, as well as people 53 to 71 years old (Baby Boomers) and Republicans, are more likely to say the ISP should be responsible rather than the government, when compared to men, people 18 to 52 years old, and Democrats, respectively.

Respondents heard the following, based on language from the *Federal Communications Commission* website defining net neutrality, and were asked whether they support or oppose the rules and regulations described:

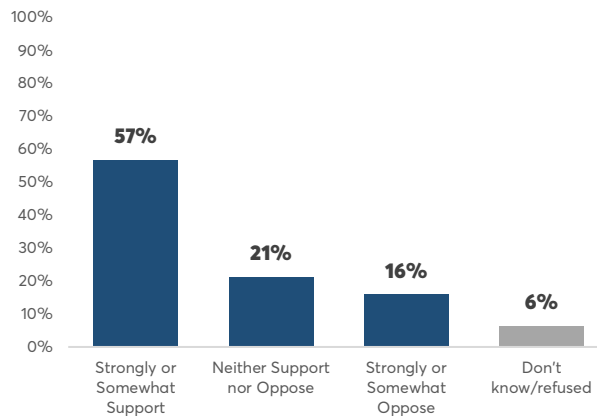
The Federal Communications Commission, or FCC, has rules for an Open Internet, sometimes referred to as 'net neutrality'. These rules prohibit certain practices by internet service providers, to protect your ability to go where you want when you want online. The current net neutrality regulations prohibit internet service providers from blocking or discriminating against lawful content on the internet.

57%

SUPPORT
NET NEUTRALITY
REGULATIONS

Over half of Americans say that they support the current net neutrality regulations that prohibit ISPs from blocking or discriminating against lawful content on the internet (31% strongly support; 26% somewhat support). 16% oppose these regulations, and about a quarter did not express an opinion.

SUPPORT OR OPPOSITION TO NET NEUTRALITY REGULATIONS



The table below shows the percentage of Americans who support or oppose these regulations by gender, age group, and political party affiliation. Men are significantly more likely to support these rules than women, and Republicans tend to be less likely to support them than Democrats. There are not significant differences in level of support based on age.

SUPPORT OR OPPOSITION TO CURRENT FCC NET NEUTRALITY REGULATIONS							
	<i>Base: All respondents</i>	Percentage of Respondents					
		Strongly Support	Somewhat Support	Neither Support nor Oppose	Somewhat Oppose	Strongly Oppose	Don't know/refused
Total	1,005	31	26	21	7	9	6
GENDER							
Male	485	39	28	18	5	7	3
Female	520	24	23	24	9	10	9
AGE							
Millennials	316	35	25	25	4	8	3
Gen X	236	31	26	21	7	10	5
Baby Boomers	287	33	26	20	7	10	5
POLITICAL PARTY AFFILIATION							
Democrat	305	38	23	18	7	6	7
Independent, lean Democrat	152	35	29	23	7	6	1
Republican	210	24	24	24	7	14	7
Independent, lean Republican	123	36	25	18	8	9	4
Independent, non-leaning	123	28	22	19	7	17	7

INTERNET SERVICE PROVIDER PRACTICES

Respondents were asked to agree or disagree with a series of statements about what an ISP should be allowed to do. Over half of Americans feel that ISPs should not be allowed to restrict the content consumers receive when accessing the internet. Throttling or paid prioritization practices are viewed as permissible by a larger percentage of people than blocking practices. For the four statements provided to respondents, below are the percentages of Americans who do not think ISPs should conduct business in this way:

67% of Americans **DISAGREE** that **An ISP should be allowed to...**

CHOOSE WHICH WEBSITES, APPS, OR STREAMING SERVICES CUSTOMERS CAN ACCESS.

63% of Americans **DISAGREE** that **An ISP should be allowed to...**

MODIFY OR EDIT CONTENT ON THE INTERNET THAT CUSTOMERS TRY TO ACCESS.

57% of Americans **DISAGREE** that **An ISP should be allowed to...**

CENSOR CONTENT ON THE INTERNET THAT CUSTOMERS TRY TO ACCESS.

48% of Americans **DISAGREE** that **An ISP should be allowed to...**

ADJUST QUALITY AND/OR SPEED OF INTERNET CONTENT BASED ON FEES CHARGED TO COMPANIES FOR PRIORITY.

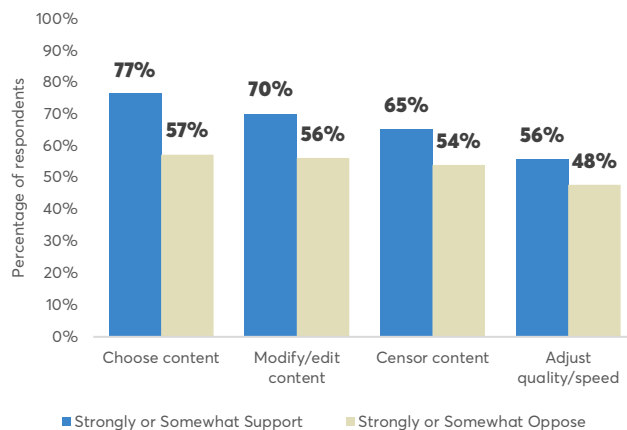
OVERALL, ISP BLOCKING PRACTICES ARE OPPOSED

by more than half of Americans, even those who say they are against net neutrality

Here, individuals are presented with the statements shown above—components of net neutrality regulations—compared to asking them to support or oppose net neutrality by name, as in the previous section. The graph at right shows that generally more supporters disagree that ISPs should do these practices, but those who say they are opposed to net neutrality often feel the same way. Interesting to note, there is not a significant difference between Republicans and Democrats in their level of disagreement with these four statements.

VIEWPOINTS THAT ISPs SHOULD NOT BE ALLOWED TO DO CERTAIN PRACTICES

among respondents who support or oppose net neutrality regulations



The table below shows the percentage of Americans who agree or disagree with ISP practices by gender, age group, and political party affiliation.

VIEWPOINTS ON WHAT INTERNET SERVICE PROVIDERS SHOULD BE ALLOWED TO DO											
An ISP should be allowed to...	Total %	Gender		Age			Political Party Affiliation				
		Male %	Female %	Millennials %	Gen X %	Baby Boomers %	Dem. %	Ind., lean Dem. %	Rep. %	Ind., lean Rep. %	Ind., non-lean. %
CHOOSE WHICH WEBSITES, APPS, OR STREAMING SERVICES CUSTOMERS CAN ACCESS											
Agree	16	12	20	15	19	15	16	16	19	14	17
No Opinion	15	14	17	7	11	17	14	13	18	11	19
Disagree	67	74	61	78	70	67	68	70	61	75	64
Don't know/refused	2	0	3	0	0	1	2	1	2	0	1
ADJUST QUALITY AND/OR SPEED OF INTERNET CONTENT BASED ON FEES CHARGED TO COMPANIES FOR PRIORITY											
Agree	26	25	27	28	24	26	23	26	30	18	33
No Opinion	24	20	26	19	20	24	25	18	26	18	19
Disagree	48	54	43	52	53	48	50	55	40	64	43
Don't know/refused	2	1	4	0	3	3	2	1	3	0	5
MODIFY OR EDIT CONTENT ON THE INTERNET THAT CUSTOMERS TRY TO ACCESS											
Agree	16	15	16	10	18	18	16	11	20	8	14
No Opinion	19	15	23	16	9	22	22	14	22	11	23
Disagree	63	70	57	74	69	58	60	75	57	81	56
Don't know/refused	2	0	4	1	3	1	2	1	1	0	7
CENSOR CONTENT ON THE INTERNET THAT CUSTOMERS TRY TO ACCESS											
Agree	21	18	23	18	24	23	22	18	21	16	22
No Opinion	21	16	24	14	16	22	20	17	25	14	21
Disagree	57	64	50	68	60	53	56	65	51	70	56
Don't know/refused	1	1	2	0	0	2	2	0	3	0	1
<i>Base: All respondents</i>	1,005	485	520	316	236	287	305	152	210	123	123

SUMMARY

More than half of Americans believe that internet service is “as important as electricity or water in today’s world.” Individuals are dependent daily on their ISP, which gives them access to the internet and other related services, and may even offer them access to cable TV, cellular, or telephone services.

The country may be split on who should create regulations that will protect the interests of the consumer. About half say the ISPs themselves should be responsible, and over 40% say it’s the government’s responsibility. Overall, though, 98% of Americans believe that ISPs need to be regulated by someone.

And, when it comes to what individuals believe should go into those policies, more than half of Americans support the current Federal Communications Commission ruling that prohibits ISPs from blocking or discriminating against lawful content on the internet—referred to as net neutrality. About a quarter of individuals have no opinion on the topic, and a smaller percentage of Americans oppose these regulations. Men are significantly more likely to support these rules than women, and Republicans tend to be less likely to support them than Democrats. There are not significant differences in level of support based on age.

We wanted to know how Americans felt about specific elements of net neutrality, such as allowing ISPs to choose which websites, apps, or streaming services customers can access, to modify or edit content on the internet, to censor content on the internet, or to adjust quality and/or speed of internet content based on fees charged to companies for priority. Throttling or paid prioritization practices are viewed as permissible by a larger percentage of people than blocking practices, and generally Americans disagree that their ISPs should participate in blocking activities. Just under half of Americans believe that ISPs should not be allowed to adjust quality or speed for prioritization fees, and more than two-thirds are against them choosing content customers can access.

The topic of net neutrality is complex, and the implications for the consumer of policies regulating ISPs may not be fully understood by all Americans. This is apparent in the finding that more than half of Americans are opposed to ISP blocking practices, even among those who say they are against net neutrality.

With a service that so permeates our lives, it is vital to understand the rules and regulations placed on internet service providers, and the viewpoints of the Americans affected by them.

METHODOLOGY

This phone survey was fielded by ORC using a nationally representative sample. The survey was conducted from July 20-23, 2017.

The study was conducted using two probability samples: randomly selected landline telephone numbers and randomly selected mobile (cell) telephone numbers. The combined sample consists of 1,005 adults (18 years old and older) living in the continental United States. Of the 1,005 interviews, 504 were from the landline sample and 501 from the cell phone sample. The margin of error for the sample of 1,005 is +/- 3.1% at the 95% confidence level. Smaller subgroups will have larger error margins.

Surveys were collected by trained and supervised U.S. based interviewers using a computer-assisted telephone interviewing system. Where appropriate, response answer choices were randomized. Scale answer choices (for example, strongly agree to strongly disagree) were randomly rotated such that half the sample was always offered positive options first and the other half negative options first. Final data is weighted by age, gender, region, race/ethnicity and education to be proportionally representative of the U.S. adult population.

Key demographic characteristics (after weighting is applied) are presented below:

- 52% female
- Median age of 46
- 61% White, non-Hispanic
- 32% 4-year college graduates
- 38% have a household income of \$50,000 or more
- 30% Democrat; 21% Republican; 40% Independent (12% *non-leaning*, 15% *lean Democrat*, 12% *lean Republican*)