

Fairness for the fast lane

19th August 2015. Consumers support an open Internet. For them this includes prioritised services, but they do not want to see their access or data limited. A WIK-Consult and YouGov study shows significant differences in consumer preferences in three major markets – Germany, UK and US.

An Internet fast lane for those who pay more, ending the free and open Internet as we know it - this idea has brought many open Internet activists, bloggers, politicians and lobbyists to take the topic net neutrality to the streets. Consumers, often left out of this debate, agree strongly that equal and unrestricted access to the Internet is a human right. In the UK and the US, 60% and 66% of consumers agree with this statement respectively. German consumers feel more strongly about their open and unrestricted Internet access. Here 78% agree with the statement. For most consumers this human right primarily means the right to receive all the content and applications that are offered online.

In line with this, data caps are frowned upon by consumers and are likely to drive provider switching. Two thirds of UK consumers indicate that they would switch if their Internet provider introduced data caps for their at home access. In the US 74% would do the same. The strongest opposition to data caps is found in Germany, where 89% of consumers would switch.

Despite the importance attached to free and unrestricted access to the Internet on both sides of the Atlantic Ocean, in all investigated markets there is a substantial segment of consumers with whom the idea of fast lanes on the Internet registers positively. In the UK, 40% of consumers agree with the idea that someone who pays extra receives prioritised access to specific applications. Whilst in the US the segment of consumers is of the same size (39%), German consumers seem to be more open to accepting such service offers (47% agreed with the statement). Prioritised treatment for governmental and emergency services' Internet traffic receives more support in the UK than in the US and Germany. 57% of UK consumers would accept its prioritisation even at the expense of other users. Only around half US and German consumers would be willing to do the same.

“Consumers demand unrestricted access and good quality of experience for themselves as well as for others.” explains Dr René Arnold (head of department at WIK-Consult). “On the other hand, they also see the potential of differentiated service offers.” This opens great opportunities for innovative products and services.

However, successful marketing of such offers will depend on an in-depth understanding of consumer preferences. “Consumers exhibit a pronounced sensitivity for fairness. They understand that non-neutral services may have greater societal and economic impacts.” says Dr Anna Schneider, “This is an important insight for Internet providers as net neutrality is one of the few topics that are likely to drive consumers to switch.”

About the study:

The results for the **UK** have been drawn from the YouGov online panel in May 2015. The YouGov online panel provides representative insights for UK every day and covers a sample of n = 2,000 respondents daily. In total, the panel draws from over 400,000 participants in the UK.

The results for the **US** have been drawn from the YouGov online panel in May 2015. The YouGov online panel provides representative insights for US every day and covers a sample of n = 1,000 respondents daily. In total, the panel draws from over 1.8 million US residents.

The results for **Germany** have been drawn from the YouGov online panel in May 2015. The YouGov online panel provides representative insights for Germany every day and covers a sample of n = 1,000 respondents daily. In total, the panel draws from over 171,000 participants in Germany.

Press Contact:

YouGov Deutschland AG
Nikolas Buckstegen
Manager PR
Tel.: +49 (0) 221 420 61 – 444
E-Mail: presse@yougov.de

WIK-Consult GmbH
Dr René Arnold
Head of Department “Markets & Perspectives”
Tel.: +49 (0) 2224 92 25 25
E-Mail: r.arnold@wik-consult.com

YouGov Deutschland AG
Dr Anna Schneider
Senior Consultant
Tel.: +49 (0) 221 420 61 – 578
E-Mail: anna.schneider@yougov.de

+++ +++ +++

WIK-Consult:

WIK-Consult is a fully owned subsidiary of WIK (Wissenschaftliches Institut für Infrastruktur und Kommunikationsdienste, i.e. Scientific Institute for Infrastructure and Communications Services). The institute was founded in 1982, originally as an organizational unit of the Deutsche Bundespost and is owned today by Germany Federal Ministry for Economic Affairs.

WIK-Consult's main objective is to provide research support for and policy advice to policy makers and private companies with a focus on electronic communications, energy and postal markets. WIK-

Consult's research and consulting activities comprise a broad range of issues regarding competition policy and regulation, market structure and business strategies and innovation. Find more information on wik-consult.com.

YouGov:

Founded in London in 2000, YouGov is considered the pioneer of online market research. Now with offices throughout the UK, the United States, Europe, the Middle East, Africa and Asia, YouGov was recently named one of the world's top 25 research companies by the respected American Marketing Association Top 25. Find more information on yougov.com.

