Global Consumer Survey on Broadband

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Abstract
A global survey on broadband Internet was administered to consumers in 40 countries, in 5 languages, drawing over 9,000 responses. The survey sought to elicit information about the biggest problems that faced consumers of broadband Internet services. This would guide the development of a global campaign to hold broadband service providers to account for their observance of consumer rights and broader human rights online.

The results of the survey indicate that home broadband Internet access has become by far the dominant method of Internet access for respondents to the survey, but three broad areas of concern stand out.

First, is that Internet speeds are often slower than advertised, and in many cases unpredictable.

Second, is the excessive cost of Internet access in locations that are not well served by a number of competing broadband providers. Even in locations where competition does exist, consumers are kept from taking advantage of it by lock-in provisions in their service contracts.

Finally, when consumers complain to their Internet providers about speed or service problems, a majority are unsatisfied with the handling of their complaints.

This paper presents highlights of the research, and concludes by outlining a possible global campaign through which Consumers International would lead its members in addressing each of the three problems that the research has uncovered.

1 Introduction

Broadband network access is a technology that has already had far-reaching effects, but is likely to be even more significant for consumers into the future as it becomes ubiquitous. Broadband is indeed becoming not simply a communications tool, but a prerequisite for consumers' full participation in civic and cultural life.

For example, in many countries, a range of government services are geared primarily towards those with Internet access, and are relatively inaccessible or inconvenient for those without. In commerce, often the lowest prices for items such as airline tickets are only available for online purchases. Telephone call centres and counter staff are
being replaced by online support centres. Students are assumed to have broadband at home for completion of school assignments. And new forms of cultural dissemination such as streaming video are accessible only through broadband Internet.

In the future, we cannot even predict how much more intrinsic broadband access will be to everyday life. It is fast becoming an essential service, like access to electricity and water. Consumers worldwide are even coming to regard broadband access as a fundamental right.1

Accordingly in 2011, Consumers International commenced a new global programme titled “Holding Broadband Service Providers to Account,” aiming to empower consumer organisations around the world to demand more equitable and accessible broadband service offerings, respecting consumers’ rights and broader human rights, as a necessary condition of achieving a socially-inclusive information society.

The first phase of this programme, conducted during 2011, was aimed at discovering exactly what are the most problematic issues that confront consumers in their access to and use of broadband networks. The results of this research will feed into the second phase of the programme in 2012, when Consumers International will develop and pilot a global campaign to address the issues that we had uncovered.

Drawing from CI’s experience in conducting a global survey on access to knowledge in 2009-2010,2 a hybrid method for conducting the research was adopted. This gave members a choice of gathering data using an online survey of broadband users, or face-to-face interviews or focus group meetings with users, or by compiling existing survey data on broadband issues from third-party sources. Each member was required to use at least two of these approaches, and some used all three. In addition, all members were asked to provide a research report on the legal and regulatory environment around broadband in their country.

This interim report covers the results of the online survey only. The results of the interviews, focus group meetings and research reports will be presented at the meeting “Consumers in the Information Society” at which this report is launched, as well as being incorporated into later outputs of the broadband programme, including a forthcoming broadband advocacy manual.

As such, the results of this report are biased towards those countries that emphasised the online survey in their research plans: in particular, the United States, Brazil and the United Kingdom. They are also biased towards those countries in whose languages the online survey was available (English, French, Spanish, Portuguese and Indonesian). Even so, enough responses were obtained from all world regions, including developing countries such as India, Kenya and Indonesia, and least developed countries such as Bangladesh and Nepal, to provide a sound preliminary indication of the appropriate focus areas for our upcoming global campaign.

Whilst this interim report is not intended, and should not be taken, as a reliable statistical picture of broadband access and usage worldwide, there are nevertheless already some very clear findings that deserve attention. An outline of some of these, emphasising global and regional trends, is presented below.

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2 Highlights

All around the world, more consumers connect to the Internet at home than anywhere else, and most of those connections are broadband. As many as 97% of our respondents had access to the Internet at home, and 83% of those home connections were at broadband speeds. These consumers are also remarkably well-informed, with only 2% of them uncertain about whether their home connection was broadband or not.

The biggest complaint that consumers have with their broadband providers is that the speed of their connection is either consistently or inconsistently slow – and often they were not clearly informed of the real speed of their connection when they signed up. The most vociferous complaints come from the customers of two of Brazil’s largest ISPs, Telefónica and Oi Velox, who were also reported as providing the world’s most unreliable Internet connections.

Moreover, lack of competition has driven up the prices of Internet services, particularly in North and Latin America, where users pay almost 50% more for their monthly Internet access than those in the other regions. Even where adequate competition does exist, users are often impeded from switching to a more affordable broadband plan because they are locked in to their current provider by contract. Over 40% of consumers are prevented from switching providers either by lack of competition or lock-in.

Our survey shows that consumers are not shy to complain when their Internet connection is not up to scratch. But unfortunately, those complaints are very badly handled on average. No less than three-quarters of those who complained about speed ended up dissatisfied or very dissatisfied with how their complaints were dealt with. Almost as badly handled were complaints about technical problems and billing.

3 Detailed results

As at close of the online survey on 31 December 2011, there were 9,092 total responses, 6,995 of which had been completed in full, and the remainder of which only partially completed. Typically, those who did not finish the survey completed about half of it before giving up, which suggests that it was too long to sustain their attention. Nonetheless, over three-quarters of respondents did persevere to the end, and this was more than sufficient to provide some useful results.

Except where otherwise noted, we have omitted incomplete results from the statistics reported here. Some additional questions were asked of UK-based respondents only, at the request of our participating UK member, but these are not analysed here either. We have also omitted “outlying” or implausibly extreme responses. In some cases – such as the respondent who claimed to be 0 years of age, and another who claimed to be 89,770,000 – these outlying responses were probably given to protect their privacy. Others – such as those who claimed to be paying thousands of dollars per month for their Internet access – likely misunderstood the question (in that case, that we had asked for the amount to be expressed in US currency).

The results were analysed using R, which is an open source statistical environment and programming language. The source data is available from CI on request to facilitate further analysis.
3.1 Demographics

23 CI members agreed to participate in the first phase of the project. In the end due to the general availability of this survey online, responses were received from consumers in 40 countries, though only 14 of these drew more than a hundred responses. Overseeing the work across the world were three regional coordinators drawn from across CI’s membership: Veridiana Alimonti of IDEC for the Americas, Marzena Kisielowska-Lipman of Consumer Focus for Europe and Africa, and Jonathan Gadir from ACCAN for the Asia Pacific and Middle East region.

The results were reasonably evenly spread across those regions, except that there were so many results from the Americas that we have split that region back into two for analysis. Amongst those who specified their location, 32% of the completed responses were from North America, 31% from Latin America and the Caribbean, 16% from Europe and Africa, and the remaining 21% from Asia Pacific and the Middle East.

Most respondents chose to reveal their gender: 70% were male, 30% female. Their average age was 45 years. From this it can be seen that the survey was not, nor was expected to be, a representative sample of the general population. As with our 2009-2010 survey on access to knowledge, the survey was undertaken by our member organisations, most of them without the assistance of a specialised survey firm. Participants were gathered by a variety of means: some drew from their own mailing lists, while others used the Web, Twitter or word of mouth.

But despite the limitations of this method of surveying, the main counterveiling benefit is that it simultaneously builds the capacity of our members on broadband issues, particularly for those who also engaged in face-to-face interviews and focus groups with consumers. This will stand these members in better stead to contribute to our global campaign when it is piloted at a national level in 2012.

3.2 Internet access

As noted above, one of the clearest findings from the survey was that for the members we surveyed, there is no substitute for broadband Internet access at home. As the figure overleaf shows, for the consumers surveyed, substantially more – about 97% – access the Internet at home rather than at work (64%), on a mobile device (57%) or at a public access point such as an Internet café, library, telecentre or the like (50%).

Furthermore, from amongst the consumers who had access to the Internet by more than one means (for example, both at home and at work), 72% reported that their primary access was at home.

Tellingly, although half of respondents had access to the Internet through a public access point, less than 2% of those who also had the ability to access the Internet by any other method chose the public access point as their primary Internet access. This illustrates that although public access points are a vital lifeline for those without any other means of accessing the Internet, for most consumers they are exactly that – a last resort. Nonetheless, they are the cheapest way of connecting to the Internet, at only about 30% of the average monthly cost ($15) of access at home ($49).

Another striking result illustrated by the figure is the extent to which broadband connections are now the dominant class of Internet access for consumers in whatever setting. The proportion of broadband connections is the highest at home – in fact 83% of those who accessed the Internet at home did so over broadband, averaged over all regions. But even amongst those who accessed the Internet on mobile devices, well
over twice as many did so at broadband speeds than at lesser speeds.

Also importantly, consumers in general seem to be well informed about whether their home Internet connections are broadband or not; only 2% of home Internet users were in any doubt about this. For users of mobile devices however, this figure rose substantially to 14%, perhaps indicating that mobile phone companies are not advertising the properties of their Internet packages as well as home Internet Service Providers (ISPs) are.

When we focus on developing countries rather than the global set of respondents, the picture is a little different. For example, the proportion of respondents who depended upon mobile devices or public access points as their primary Internet access were highest respectively in Kenya (at 25%) and Vietnam (at 21%). The region with the lowest penetration of home Internet access (81%) was also that with the highest proportion of responses from developing countries, namely Asia Pacific and the Middle East. Additionally, Internet connections were shared amongst more people in that region than any other. For example in North America, only 8% of connections are shared with more than four people, but 21% in Asia Pacific and the Middle East. Nonetheless even in this region – where the proportion of home broadband access is lowest at 73% – this still amounts to a sizeable margin over slower forms of access.

Overall, then, it can be concluded from this section of the survey that the dominance of home broadband as a method of Internet access validates Consumers International’s choice of focus for our campaign, “Holding broadband service providers to account.”
3.3 Competition and choice

Overall, users in North and Latin America paid almost 50% more for their monthly Internet access than those in the other regions. For example, an average United States Internet user paid about $62 per month, and an Argentinian $39, whilst a Briton paid $29, and an Indian only $21. The figure below shows only the ten most popular ISPs recorded in our survey, along with the respondents’ ratings of how much value for money they provided, ranging from “very poor” (on the left) to “excellent” (on the right). There is also an “other” result that aggregates the ratings given to all other ISPs. Consistently with the survey’s quantitative results, all of the ISPs rated as providing poorer value for money than “other” are North or Latin American. All those rated better are European. (Although not shown on the chart, major Asian and African ISPs such as Airtel (India), SK Broadband (Korea) and Access Kenya also fared somewhat better than their American counterparts.)

This seems to be attributable in part to a serious lack of effective competition in many American broadband markets. Over a third of North American and Latin American users reported that they were impeded from changing their Internet provider because of a lack of competitors offering equivalent services. This compares to only 14% who made the same complaint in Europe and Africa, and 19% in Asia Pacific and
the Middle East. Although not reported here, the preliminary results of our member survey on broadband will bear out this observation of lack of effective competition, particularly outside of urban areas.

Offsetting this however, consumers in Europe and Africa, and Asia Pacific and the Middle East, were more likely than their American counterparts to be locked in to their Internet provider by a fixed-term contract. 30% of consumers in the former regions reported that fixed contract terms prevented them from shifting ISPs, which is almost twice as many as those from the Americas who made such a complaint. Interestingly, only 7% of consumers were affected by both lack of competition and contractual lock-in, indicating that most ISPs will only bother locking their customers in to long-term contracts if competitors exist to tempt those customers away. Together, these two factors affected over 40% of consumers.

The next most important factor that impeded consumers from switching Internet provider, quite consistently across all regions, was the bundling of several services together. Easily the most common bundle worldwide is phone line rental, which about 30% of consumers pay together with their Internet service; unsurprisingly, given that Internet services were traditionally delivered over telephone lines. Also very popular in Latin America is the inclusion of a pay television service – with more than one in five consumers subscribing to such a bundle, which is almost twice as many as in the other regions. In Asia Pacific and the Middle East, almost 16% of consumers were renting or paying off an access device such as a handset as part of their subscription, which is again almost twice as many as in the other regions.

Fewer than one in ten consumers was affected by the locking of their access device to a single provider, but more than half of those who were affected were those who accessed the Internet through a mobile device, and North America was the region most affected by this practice. One consumer burned by this made the very apt comment, “The vendor locked device works only with their network whereas they charged full cost of the device while purchasing the connection”.

3.4 Information and service quality

Our survey next asked respondents about what information they received when signing up for their Internet service, and how accurate that information was in the light of their subsequent experience using the service. As might have been expected, most consumers who answered this question had received information about the cost of the service (70%) and its speed (54%), with little variation from one region to another. A decreasing minority of consumers were notified about other issues concerning their Internet service, such as any applicable minimum contract term (28%), any usage caps or excess charges (17%), how changes could be made to their terms and conditions of service (14%), how their personal data would be used by the company (10%), and finally about any Internet services that would be subject to differential treatment by the ISP (4%).

As can be seen from the figure overleaf, the information given about the speed of the service tended to be less accurate than that about the other topics, though only 16% described it as “very inaccurate”. However this did vary by region, with about 20% of consumers from the largely developing regions of Latin America and Asia Pacific and the Middle East complaining of very inaccurate claims about speed. This is as against only 7% of consumers across Europe and Africa who were dissatisfied for the same reason.
Corresponding to this result, the survey also found slow Internet speeds to be one of the major problems suffered by Internet users from the affected regions. Looking at the major ISPs that were earlier listed in our figure, extremely high levels of dissatisfaction exist with the speeds provided by the Brazilian broadband ISPs Telefônica and Oi Velox – reported as a “serious problem” by no fewer than 39% of Telefônica’s subscriber respondents, and 44% of Oi’s. A separate question asking for respondents to rate their ISP on the speed of their connection returned a similar result, with 36% and 41% respectively rating Telefônica and Oi Velox “very poor”. No other ISPs in our survey, small or large, received such strong condemnation as these.

The travails of Telefônica and Oi Velox customers don’t end with their complaints about speed. These two ISPs also stand out as giving their customers the most trouble in establishing a connection to the Internet in the first place (respectively for 30% and 34% of respondents, against an industry average of only 13%). With surprising restraint, only 21% and 27% of their long-suffering customers gave Telefônica and Oi Velox a “very poor” rating for “reliability of connection” in response to this, but that was still 2.7 times worse than the industry average!

Other than speed and connection issues, most other technical problems created less concern for most. A majority reported few or no problems in accessing particular sites and services – which was a question intended to cover the mysterious failures caused by blocking or filtering (discussed in section 3.7). Fewer still had trouble using Internet software (though some complained that their ISPs did not support software for operating systems besides Microsoft Windows, such as Linux and Mac OS X).

From this section of the survey, then, we drew a very clear message that customers are concerned that the speed of their Internet connection is described accurately, and that it is delivered reliably. Consumers can be very unforgiving to ISPs who do not deliver on this basic promise.

### 3.5 Complaint handling

Consumers were not taking these problems with speed and reliability lying down. In the first instance, more than two-thirds of consumers who encountered problems...
sought technical support from their Internet provider. When this failed – only a quarter of consumers were completely or substantially satisfied with the technical support they received – many went further and lodged a complaint.

The top ground of complaint was about slow speed – either in general, for 28% of those who complained, or for another 13% the slowing of access at certain times or where the user’s download allowance had been exceeded. The second most common ground of complaint, made by 20%, was over other technical problems that could not be resolved through technical support. In fact, more than half of those who reported a problem or a serious problem with Internet speed or in connecting to the Internet followed up with a complaint to their ISP. Typical comments included:

- “Installation of my ADSL connection was a nightmare, and I was provided contradictory information on several occasions, had to wait on several occasions for workmen, and could not get reasonable answers from service staff”.
- “They tried troubleshooting my computer settings, rather than admitting that many customers in our area had also lost connections”.
- “It seems about useless to talk to their technical support staff. They aren’t given the tools that real technicians would be given to resolve issues. And customers are not given access to real technicians so that we could adequately describe the issues”.

The third main area of complaint, affecting 16% of respondents, was billing. Typical complaints were as to the calculation of usage charges. One respondent complained of ‘charges for use of ‘excessive’ data consumption (I had no idea that was their policy, much less how it worked)”. Another very reasonably asked, “My connection is a volume based connection hence I want to know and check how my balance is being consumed”. It is surprising how few ISPs offer such information to their customers.

Smaller numbers of complaints were recorded about changes to terms and conditions (8%), blocking access to content or services (4%) and a variety of other issues including Internet call quality, “ping times” for gamers, difficulties in understanding foreign support staff, and the ISP’s refusal to suspend service during a vacation.

Whilst it is heartening to see consumers exercising their rights, it is disappointing to see how poorly those complaints were dealt with. Across all regions and ISPs, three quarters of those who complained about speed ended up dissatisfied or very dissatisfied with how their complaints were dealt with. For those who complained about technical problems, 62% remained dissatisfied or very dissatisfied with how these complaints were resolved. For billing complaints, the figure was 54%.

This does not mean that consumers are unhappy with customer service in general. Overall, their satisfaction is actually rather evenly distributed, with as many rating it badly as rated it well, and most rating it in the middle (this notwithstanding the dreadful results for the two large ISPs from Brazil, where 27% of consumers rated their ISP’s customer service as very poor). Rather, the customer service problems seems to be fairly specific to complaint handling.

In some countries, it is possible to take complaints further, for example to a government regulator (which was the most popular option for our survey respondents), an independent ombudsman, or some other dispute resolution body. But the majority of consumers, asked where they took their complaint further, gave an answer such as “do not know where to complain”, or “no redress avenues, one reaches a dead end”. A minority of consumers were even forced to take the costly option of going to court.

Amongst those respondents with a happier story to tell were those from Australia,
where most who took their complaint further did so to the independent Telecommunications Industry Ombudsman. CI believes that this kind of mechanism for quick, inexpensive resolution of Internet service disputes should be available to consumers around the world.

In any case, something we can easily take-away from this section of the survey is that complaint handling is an area that ISPs in general need to improve.

### 3.6 Use of the Internet

What are the main uses that consumers make of the Internet? Knowing the answer to this question was important so that we could tailor the objectives of our broadband campaign to meet consumers’ real needs. A summary of the results is presented in the next figure. It is little surprise that email and general Internet browsing were respectively the most and second-most popular applications of the Internet. Interestingly, online banking and shopping came third, which shows that consumers are justified in their concern about access difficulties, as these can significantly disrupt their daily lives. Least common was publishing one’s own content to the Internet, for example through a blog or by sharing personal photos and videos.

There were few significant differences between males and females for any of these uses; the biggest being that the number of males who used the Internet for downloading music, videos or software was eight percentage points higher than for females. Age was a much more significant determinant of use, with younger users (under 30s) more likely than older users to use the Internet for chat, streaming, downloading, social networking and blogging. Remembering that the average age of our respondents was 45, most likely the prevalence of these activities amongst the general population is understated by our survey. For older users, the Internet was a functional way of communicating and accessing information, rather than a leisure or social activity.

We also find some differences between regions. For example, online shopping and banking is very popular in Europe and Latin America, with almost three-quarters of consumers in those regions participating, but only 43% in Asia. The reason is not immediately clear: perhaps fewer online retailers ship to Asia? This deserves further study. North Americans are the world’s most avid contributors of their own content to the Internet, according to our survey: more than one in five uses the Internet in...
this way, almost twice as many as in Europe or Latin America. Equally interesting are some of the areas in which no significant differences between regions were found: most notably, all regions reported a similar incidence of downloading music, videos and software online, by between 40-50% of online users.

Those who reported that their home Internet connections were not up to broadband speed were about 10% less likely to use the Internet for low-bandwidth applications such as email, and even less likely to make use of high-bandwidth applications such as making voice or video calls (13% less likely), and streaming music or video (15% less likely). Whilst in some cases this may be by choice, it is important that broadband is made available at an affordable price for all, in order that the inequalities of the offline world are not simply replicated online.

Most users reported little difficulty in using the Internet effectively, though 11% said that they could do with more training, and 6% wanted to see more content available in their native languages, including Kiswahili and Bangla. Only 3% were impeded in their use of the Internet by a disability, ranging from vision problems which make it difficult to read, to lack of dexterity that impedes typing, and physical weakness that prevents the user from diagnosing connection problems by checking cable connections and the like.

3.7 Net neutrality

One of the emerging issues on which our survey focused was on net neutrality – the general principle that ISPs should not interfere with the content that they deliver over the Internet, by giving some types or uses of content priority over others for commercial reasons. After all, the success of the Internet has largely arisen from its capacity to democratise communications, allowing anyone to publish and receive information at low cost. Closely related to the preservation of net neutrality is the need to ensure that ISPs do not engage in unjustified blocking or filtering of Internet content, unless required by law or consented to by the consumer.

Only 4% of users were informed that some content could be blocked, filtered, prioritised, or slowed down by their Internet Service Providers. Another 7% believed that content or services had in fact been blocked or filtered, and another 8% felt that it had been slowed down or prioritised. Another 40% weren’t sure. But only 9% of users reported that the lack of access to particular sites and services – a symptom of blocking and filtering – was a serious problem for them. ISPs were rated well on “access to services and content of your choice” by 32% more respondents than rated them poorly. This suggests that network neutrality, blocking and filtering issues are not yet strongly impacting most of the consumers who responded to our survey.

Nevertheless, some respondents did report that blocking (which is a blanket ban on certain content, applications or services) was being conducted by some ISPs to prevent:

- The use of peer-to-peer filesharing software (in Argentina, Brazil, the Philippines and the United Kingdom);
- Access to Usenet news groups (in the United States);
- Use of Internet phone services (in South Korea and the United States);
- Access to pornography (in Indonesia, Malaysia and Nepal); and even
- Access to certain news and political sites (in Fiji and Nepal).
As for filtering, which is the more selective removal of content based on keywords or patterns, there were reports from several countries that this was being used to weed out spam email. So long as the consumer is informed of such filtering, and preferably given the capacity to opt out from it, this particular application of filtering can be benign and even beneficial to the consumer. By the same token, an Australian respondent reported that his ISP prevents his connection being used to send email through third-party servers, as compromised computers are often used to send spam in this way – but that the block will be removed on request.

Finally, we asked about consumers’ experiences of certain Internet content or services being either slowed down, or conversely, prioritised so as to deliver it faster or more cheaply than other such content or services. Although this question was directed at the selective slowing of particular content or services, some consumers took the opportunity to complain about their entire Internet connection being slowed down once they had reached a usage limit. One said, “I unknowingly went over my bandwidth limit. I’d no idea there was a limit. They stopped all access and sent me an email entitled ‘Wildblue Abuse’.” Others reported that this practice was being used selectively against the use of peer-to-peer filesharing software – most notoriously by US ISP Comcast, which was sued by the US Federal Communications Commission in 2008 for doing exactly this.

As to the prioritisation of content, it was reported that ISPs were providing preferential access to their own FTP and gaming servers and their own branded IPTV services (such as British Telecom’s BT Vision TV Service). Debate exists as to how much of a concern this practice is, but proponents of net neutrality argue that it creates a “walled garden” in which users are discouraged from accessing content other than the provider’s own, thereby raising barriers for other content providers. In some cases ISPs were also prioritising particular third-party services – including social networking services such as Facebook, LinkedIn, Hi-5 and Twitter, and catch-up TV services such as Australia’s ABC iView. The commercial terms, if any, behind these preferential arrangements are not revealed to the consumer, which raises potential competition issues.

From this section of the survey we must conclude that net neutrality, blocking and filtering are not yet areas of prime concern to most consumers and will therefore not be a focus of our upcoming campaigning activities. However, they do remain areas for us to monitor carefully going forward.

### 3.8 Internet content

Some of the content users encounter on the Internet is annoying, offensive, or even dangerous. Whilst it can be persuasively argued that dangerous content or content that transgresses international legal norms should be removed from the Internet at source, for content about which values or preferences may reasonably differ, the better approach is to allow individual users and their families to control what content they do or do not encounter online.

The table summarises some of the types of content that users found most problematic, and how they dealt with it:

- The left column describes the types of content about which the survey asked: advertising (including both Web and email-based), frauds and scams, offensive content (however defined by the respondent), and malware such as viruses and spyware.
• The next major column shows how many respondents described the content in question as a serious problem (SP), no problem (NP), or somewhere in between (most of these total slightly under 100%, due to rounding).

• The next major column shows what percentage of users filter out this content with their own software or device, those who don’t know how to filter it out, and those who may know how but choose not to do so.

• The final column indicates the respondents whose ISPs offer filtering of the content in question – this is not exclusive with the previous column, as some users filter out unwanted content that their provider also filters.

The results reveal that with one exception, most Internet content is not filtered, either by users or by their providers. That one important exception is malware, which 62% of consumers do filter out using their own Internet security software. This class of unwanted content also poses a serious problem for more consumers than any other, and is the type of content that fewest consumers claim not to want filtered.

Offensive content was a problem for the fewest users, with half of all users claiming that it presented them with little or no problem at all, and a quarter explicitly stating that they had chosen not to filter it – more than twice the number who had chosen not to filter any other class of problem content. Nonetheless, a third of users did voluntarily filter offensive content out from their Internet connections, perhaps because their connection was shared by younger family members.

### 3.9 Monitoring and enforcement

Our consumer survey on broadband mainly concerns the behaviour of Internet Service Providers, rather than that of third-party content hosts or advertisers, or the policies of governments, both of which lie outside the scope of our campaign. But there is one area in which all three of these actors have a major part to play, and that is in monitoring of Internet users’ behaviour online. The Internet Service Provider is an important intermediary in monitoring Internet users for law enforcement purposes in particular, so it is on this that our survey focussed.

Only 17% of consumers surveyed believed that their communications over the Internet were being monitored by their service provider, the government, or a third party. 28% didn’t think so, and the remainder weren’t sure. A typical comment made by one of those who believed they were being monitored was “I simply live under the assumption that I’m being monitored. And I don’t like that!”
This result varied by country and region: most notably, in communist Vietnam, 38% of users believed their communications to be monitored. In Fiji, which is currently under an interim military government, one respondent wrote “There was one time when instead of loading the website I had clicked, a page loaded with a message from my provider informing me that my internet activity is being monitored”. A number of US-based respondents were concerned about their communications being intercepted by the NSA’s signals intelligence programme, ECHELON, or by the FBI’s Carnivore software.

Others were worried not so much about government surveillance as about tracking by advertisers. One wrote, “Many of the ads that appear on random pages seem to be targeted based on other pages I’ve navigated to. So if I’m shopping for mower parts, suddenly riding mower ads populate the Yahoo Sports pages”. This respondent blamed his service provider for passing on his browsing details, but most likely the ISP is innocent, and it is third-party websites that are to blame for leaking his browsing habits. Whilst this takes the problem outside the scope of our broadband campaign, CI is separately working with the World Wide Web Consortium (W3C) on a new standard called “Do Not Track” to regulate the intrusive tracking of consumers by online advertisers.

Consumers are also being monitored online by copyright owners seeking evidence of copyright infringement, and in some countries through a cooperative or co-regulatory arrangement with ISPs, the latter will pass allegations of infringement onto their users. In our survey, as many as 12% of respondents declared that they had received a warning about having accessed copyright-infringing content online. One of them wrote, “I was sent a letter informing me that ‘someone’ at my IP address had seeded a torrent. Apparently one of my children downloaded an old TV show”.

In some countries that participated in this survey, such as South Korea and New Zealand, users’ Internet connections can be suspended as a penalty for repeated alleged copyright infringement, though thankfully none of our respondents reported having yet suffered that fate.

Similarly, 7% of respondents had received a take-down notice for allegedly hosting copyright-infringing content online. Typically this was something as innocent as uploading a YouTube home movie, or even in one case a slide presentation, with copyrighted background music. In a few more cases (6%), content was taken down for infringing other laws or policies. One respondent wrote, “I once posted on Photobucket a rear view of a 3D nude figure I’d done. Didn’t know rear-views were a big no-no”. Once again, nobody reported actually having had their Internet connection suspended as a penalty for their alleged misuse.

Whilst laws and policies that allow intermediaries such as ISPs to monitor and act upon consumers’ behaviour online are potentially worrying, the evidence from our survey does not reveal the impacts of those policies to be so serious or widespread that they should be a focus of our global broadband campaign. Nonetheless, we will continue to assess the effect of these laws and policies as time goes on, and collaborate with other public interest voices in bringing to light any instances of their abuse.

4 Conclusions

CI’s global consumer survey on broadband was a broad-ranging investigation of a large number of areas of potential concern for consumers of Internet access services.
These included traditional consumer protection issues such as misleading advertising and complaint handling, human rights issues such as freedom of expression and privacy, security issues such as spam and cybercrime, accessibility issues such as multilingualism and disability, and infrastructure issues such as access to broadband and network neutrality.

The aim of this research was to identify which of these issues affected consumers around the world the most acutely, in order to inform the development of a global campaign targeted at broadband service providers, that would focus on these problem issues. Additionally, our research would reveal which countries suffered most seriously from the identified issues, so that our global campaign could be piloted in these countries at first.

Based on the results of our online consumer survey, we can be confident that we have achieved those aims. The research clearly lays out three main issues around which our future campaign could be based:

1. Internet connection speeds are unreliable, and claims made about speed are frequently inaccurate.
2. Consumers are forced into paying excessive prices, by lack of effective competition or by contractual lock-in.
3. Broadband providers do not provide a satisfactory complaint handling mechanism for consumers.

From these three points, we can identify the possible themes of a global campaign to be developed by CI and its members to be piloted by selected members during 2012.

To address the speed complaints, at our meeting “Consumers in the Information Society” we will be promoting the idea of a “broadband nutrition label”, based on the New America Foundation’s “Broadband Truth-in-Labeling” campaign of 2009. This label, which, as the name implies, somewhat resembles the nutrition label on prepacked foods, would disclose the actual Internet speeds that broadband users can expect in a simple, hype-free format, and would encourage ISPs to back this up with a service guarantee. Based on feedback from our members at the meeting, and drawing from other best practices such as Ofcom’s Voluntary Code of Practice on Broadband Speeds, Consumers International plans to present a template broadband nutrition label as a cornerstone of our global broadband campaign later in 2012.

The broadband nutrition label will address the pricing problem too, by increasing pricing transparency. The underlying lack of competition will be more difficult to address, but thankfully there is a well-resourced UN Broadband Commission whose mandate is to stimulate private-sector investment and to encourage governments to provide an enabling environment for investment in broadband infrastructure. CI will not attempt to duplicate the Commission’s important work. What we can do, however, is to focus this part of our campaign upon the other main issue that prevents consumers from shopping around for the most competitive broadband deal: contractual lock-in. We plan to develop a series of online and off-line campaigning materials on the theme, “Don’t Lock Me In!” to express consumers’ desire to freely choose between competing broadband providers, without being tied into long-term contracts.

Finally, to address the grave deficiencies of the industry’s complaint handling procedures, we plan to support selected members in countries that are badly affected by

3See http://www.broadbandcommission.org/.
Internet service complaints, and that do not already have an accessible venue for alternative dispute resolution of broadband complaints, to campaign for the introduction of an ombudsman service for their Internet industry, such as those that operate in the United Kingdom and Australia. This will provide an independent, low or no-cost method for the resolution of complaints against broadband service providers; a task that the providers themselves have proven incapable of adequately fulfilling.