

**Which?**

**Britainthinks**  
— Insight & Strategy —

**POLICY RESEARCH REPORT OCTOBER 2019**

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# Consumer engagement with broadband

Summary of qualitative research

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## Which? reflections on the research

Our lives are becoming increasingly reliant on being connected as more and more of us move to performing essential everyday tasks online, such as banking and shopping, as well as streaming TV and films. As a result, it is essential that consumers have a reliable broadband connection that meets their needs.

There's no doubt that investment in better infrastructure is key to deliver this. However, unless consumers are empowered to act and take advantage of the improved services that those investments provide, they will miss out on benefits such as more reliable connections, faster speeds, or a greater choice of packages.

It is clear that consumers can benefit from engaging in the broadband market. Recent research by Ofcom found that broadband customers who are out of contract can save around £100 per year on average by signing up to a better deal.<sup>1</sup> However, they often face barriers to doing so. Therefore, Which? set out to gain a fuller understanding of the barriers that consumers face in engaging with the broadband market and to inform potential solutions to overcome them.

In-depth qualitative research was conducted with consumers around the UK to explore the drivers that underpin people's behaviours and decisions around engagement. This research was complemented by a general public survey<sup>2</sup> in September 2019 of 1,714 UK adults who have responsibility for their broadband contract.

The research found that lack of engagement is the result of a complex picture of interlinking factors and associated behavioural biases. We found **six key barriers to broadband engagement**. These relate to the confidence and ability of consumers to understand their needs and identify a relevant package, their knowledge of how pricing works in the market, their beliefs around the risk of making changes and their evaluation of their current service.

Our research highlighted that a lack of effective communications about current and alternative packages can prevent consumers from ensuring they have the most suitable package for their needs. Consumers can lack awareness of what alternatives may be available with their current provider, or have concerns about contacting them. 44% of those who never or hardly ever made changes to their contract agreed that they don't receive deals from their provider that seem relevant to them; 42% said that they think their provider will try to "oversell" them if they call them to talk about a new package/deal. The introduction of end-of-contract notifications<sup>3</sup> may help to address some of these barriers. However, *ex post* evaluation of these will be critical to ensure that they are working for consumers.

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1 Ofcom, 'Helping consumers get better deals: A review of pricing practices in fixed broadband', September 2019. Accessed on 26/9/2019 via [https://www.ofcom.org.uk/\\_\\_data/assets/pdf\\_file/0018/168003/broadband-price-differentials.pdf](https://www.ofcom.org.uk/__data/assets/pdf_file/0018/168003/broadband-price-differentials.pdf)

2 Which? surveyed 2069 UK adults, of whom 1714 said they were responsible for making decisions about broadband, between 4th and 6th September 2019. Fieldwork was carried out online by Populus and data have been weighted to be representative of the UK population (aged 18+).

3 Ofcom, Helping Customers get better deals: Statement on end-of-contract and annual best tariff information. Available at: [https://www.ofcom.org.uk/\\_\\_data/assets/pdf\\_file/0018/148140/statement-helping-consumers-get-better-deals.pdf](https://www.ofcom.org.uk/__data/assets/pdf_file/0018/148140/statement-helping-consumers-get-better-deals.pdf)

Underlying these six key barriers were a number of associations that consumers had with the broadband market that appear to reduce the likelihood of taking action, relative to other markets:

- **Consumers largely perceive the broadband market to be more complex than other essential markets.** For example people who never or hardly ever made changes to their broadband contract are more likely to say that there are lots of technical terms which make researching and identifying the right product/service difficult when thinking about the broadband market (20%), than car insurance (9%), current accounts (7%), gas/electricity (14%) and mobile phone contracts (13%).
- **Consumers believe that there are greater risks in changing their package and/or provider, and that the benefits of engaging are less obvious.** We found that those who never or hardly ever made changes to their contract were more likely to say that there was some form of risk<sup>4</sup> attached to changing product/service in the broadband market than other markets<sup>5</sup> and six in ten (62%) said that there isn't a big enough benefit to switch broadband package or provider.
- **'Push' factors are far more likely than 'pull' factors to lead consumers to engage in the market.** In particular, an unexpected and unacceptable price increase or experience of a particularly bad service. We found that amongst our survey participants who said they sometimes make changes (to their package or provider) at the end of contract, the top reason for not always engaging was that they only tend to take action when there has been a price increase that is not acceptable (53%).

Consumers also had other perceptions of the market that impacted their decision to engage. Overall, superfast broadband was considered a premium service, with **faster speeds not commonly considered an attractive 'pull' for consumers, other than for those who have a serious service issue.** This aligns with our survey findings where six in ten (62%) of those who say they don't have superfast (or don't know if they do) agreed that superfast broadband isn't enough of an incentive to make them switch package.

Alongside these key barriers and perceptions, there are **low levels of trust in the broadband market.** This is coupled with the view that there is little differentiation between providers. Therefore the offerings of alternative providers rarely act as a 'pull' to engagement. Half (49%) of people who never/hardly ever made changes to their contract agreed that there isn't much difference between providers for broadband packages.

The research clearly shows that there is no silver bullet solution to increase consumer engagement. It demonstrates that **a collection of complementary solutions will be required to improve engagement with the broadband market as a whole.**

We believe that there are **five important lessons** that industry, the regulator, ourselves and other consumer groups should take away from the findings of this research:

1. When designing new interventions to foster consumer engagement (such as data portability initiatives), they must take a consumer-centric approach and the design must be informed by rigorous *ex ante* consumer testing. We welcome Ofcom's recent proposals to require Communications Providers to take part in trials in relation to measures which seek to address how customers engage in the communications market.<sup>6</sup>

4 Net risk: something may go wrong/ there may be hidden charges/carries the risk of service interruptions.

5 Broadband (48%), car insurance (17%), current account (27%), gas/ electricity (32%) and mobile phone contract (36%)

6 Ofcom, 'Trialling consumer remedies'. Accessed on 27/9/2019 via [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0035/167696/consultation-trialling-consumer-remedies.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0035/167696/consultation-trialling-consumer-remedies.pdf)

2. In relation to solutions that have been already announced or implemented to foster engagement (e.g. end-of-contract notifications), it is essential that *ex post* evaluations and reviews are undertaken to understand whether the interventions are successfully delivering on their original aims.
3. The industry needs to reflect on whether current communications with consumers help ensure that they are on the right package for their needs. It must also consider the long-term impact of those communications on consumers' trust in the industry and the resulting knock-on effect on consumers' willingness to engage to take advantage of better services delivered by investments in new technologies.
4. There is an opportunity for companies to offer more tangible incentives which resonate with consumers and which differentiate themselves from others in the market. Our research shows that current incentives, such as the promise of faster speeds from superfast, are only resonating with a small number of consumers.
5. Consumer groups, in conjunction with industry and Ofcom, must work together to help consumers better understand the broadband market and the benefits of engagement. This includes working to raise consumer expectations such that they are providing the right demand-side competitive pressure for companies to improve their services.

If you would like more information on the research, or to discuss it, please contact [broadbandengagement@which.co.uk](mailto:broadbandengagement@which.co.uk)

# Summary of research and findings

## Background to the research

As the leading consumer champion, Which? exists to tackle all aspects of consumer detriment. Which? has identified significant potential for consumer detriment to arise from a lack of engagement in the broadband market. Consumers may be missing out on opportunities to get the best package for their needs, which may deliver a better level of service or a cheaper price.

Which? wanted to develop a deeper, behavioural understanding of the barriers consumers face in engaging with this market. This would then inform discussion about solutions for fostering more engagement.

The slow take-up of superfast broadband services was an area of particular interest in the research. Despite the service being available to 95% of UK premises<sup>7</sup> and the price of superfast being broadly similar to many standard broadband services,<sup>8</sup> only 45% of consumers are reported to have taken it up.<sup>9</sup>

Understanding why consumers may be forgoing the potential benefits that superfast broadband could offer is important, not only to understand what could drive take-up of this service but also to help ensure successful consumer engagement with future service improvements. As the rollout of full-fibre progresses over the coming years, uptake will be dependent on consumers understanding the benefits that it will deliver, particularly given the potential disruption caused by streetworks and the need for engineers to visit people's homes.

The COM-B<sup>10</sup> model was used to identify the drivers behind consumers' behaviour. According to this model, human behaviours can be explained by factors associated with capability (e.g. skills, knowledge), opportunity (e.g. time, information) and/or motivation (e.g. beliefs, emotions, habits). The model was used to identify the factors that act as barriers to engagement in the broadband market and to assess how these interact. Sometimes behavioural factors were associated with these, for example, risk aversion and status quo bias.

### Research Methodology

An online community with 120 participants living across the UK, conducted from 27<sup>th</sup> March to 23<sup>rd</sup> April 2019. The participant sample was designed to be reflective of a range of demographics and experiences. Whilst the majority of participants were recruited to be demonstrating low engagement in the market,<sup>11</sup> a sub-sample of consumers who habitually engaged in the market were also included to act as a control group.

Follow-up depth interviews conducted face-to-face or by telephone with 36 participants between 22<sup>nd</sup> May and 17<sup>th</sup> June 2019.

7 Based on Ofcom's definition of superfast broadband: download speeds of 30Mbps and above.

8 Ofcom, Pricing Trends for Communications Services 2018

9 Ofcom, Connected Nations 2018

10 The COM-B model is a framework that views human behaviour as emerging from an interaction of the 'capability' to perform a certain behaviour, and the 'opportunity' and 'motivation' to carry it out. For further information, see Michie et al., 'The behaviour change wheel: A new method for characterising and designing behaviour change interventions', Implementation Science, volume 6, Article number: 42, April 2011.

11 Measured by having not switched provider in the past two years.

## Consumers' perceptions of the broadband market

### Defining engagement

Engagement with the broadband market has been defined in this research as a consumer taking some form of action to ensure that they are on a broadband package that best suits their needs.

There are ways of engaging with broadband beyond switching to a new provider. For example, a consumer could switch package with their existing provider, or renegotiate key elements of their current package (i.e. price, speed).

Participants' levels of engagement were generally not consistent across essential service markets. Engagement with broadband was fairly low when compared with other markets with participants more likely to report engaging with mobile phone services, energy and car insurance.

Four specific associations with the broadband market appear to reduce likelihood of engagement.

- **A belief that broadband is more complex and technical than other services.** Most services were felt to feature at least some complexity. However, broadband was seen as the hardest to navigate due to the perceived likelihood of encountering technical questions (e.g. about speed) and the presence of bundling, which was felt to make pricing more difficult to understand.
- **Greater risk aversion<sup>12</sup> towards broadband.** Engagement with broadband was felt to be a 'higher stakes' decision than in some other services such as energy and insurance. This was due to fears that changing broadband package might include a loss of some form, specifically 'hidden' costs or a worse service.
- **Less awareness of the benefits of engagement.** Participants had greater pre-existing awareness of the financial savings that they could make through engaging with the energy and car insurance markets, which were both felt to be particularly high outgoings. In the mobile phone market, changes in handset, whether due to functionality issues or personal interest, encouraged consumers to engage. In broadband, there were fewer perceived incentives to engage. For instance, superfast does not appear to be a compelling reason to engage unless there are serious service issues, or if it is part of a wider package of changes such as getting pay TV.
- **Less familiarity with broadband.** Consumers were less familiar with the broadband market compared to more established markets (e.g. energy or car insurance). The different services available e.g. terms of speed or reliability were often felt to be new and unfamiliar.

*"I review and change my fuel and insurances every time the contract comes up for review, because I know I can get a better deal elsewhere...Broadband has always seemed a lot more difficult to do and think it was a case of 'if it's not broken don't fix it'. Also, unlike fuel etc. which are only 'paper' changes, with broadband you physically have to change equipment such as a hub etc. and reconnect everything."*

(Male, 75+, Swansea)

*"I enjoy my package from [provider] but feel it's too dear. But I'm not wanting the hassle of changing over and maybe not getting as good a service as I already do."*

(Female, 18–34, Falkirk)

*"I haven't got the confidence, I don't know the terminology, I'd have to be prepared for the sales pitch [if I called my provider]...so I ignore it and don't do anything about it."*

(Female, 55–74, Falkirk)

<sup>12</sup> 'Risk aversion' refers to the idea that, when faced with a decision that involves some uncertainty, individuals will try to lower this to avoid potential risks. This leads to a preference for a certain outcome over a less certain outcome, even when the latter could result in an equal or better result.

When the less engaged research participants had interacted with the broadband market, this was rarely proactive. Rather, engagement was often reactive and in response to a specific prompt. Of these prompts, the majority were a negative ‘push’ away from current service, rather than a positive ‘pull’ towards a new service:

- **The most common ‘push’ to engage was unexpected, unacceptably large increases in price.** Participants described being surprised when their monthly broadband cost had risen (e.g. as a result of discounts ending), which they often noticed had happened only after looking at their bank statements. This experience led some consumers to engage with the market by speaking to their provider to try and contain the cost. Other potential ‘pushes’ to engage were less effective, including experiencing service issues and reaching the end of broadband contract.
- **Faster broadband speeds were not a strong ‘pull’ to engage.** Overall, knowledge of superfast broadband was low and participants viewed it as a ‘premium’ service and something they didn’t need or wasn’t really relevant to them. A priority for consumers was often to ensure that their broadband service remained consistent, so when engaging they tended to choose a package similar to their existing one. The exception was in instances where consumers experienced a major service issue and were confident they could get a better service. In these cases, faster broadband speeds could act as a ‘push’ to engage.
- **Pay TV sometimes prompted engagement with bundled packages including broadband services.** However, this was not necessarily in an effective way, as TV services tended to lead consumers’ decision-making on particular bundled packages rather than consideration of whether or not they were getting the best deal for their needs in relation to the broadband component of a bundle.
- **Low trust in the market, coupled with the view that there is little difference between providers, meant that alternative providers rarely acted as a ‘pull’ to engage.** There was a sense that there is little to differentiate broadband providers, and that many of the concerns consumers identify (e.g. ‘hidden costs’ within complex bundles or poor resolution of service issues) are symptomatic of the whole market.

### Barriers to engagement with the broadband market

A wide range of barriers were identified using the COM-B framework. Of these barriers, very few exist in isolation. Rather, they interact with one another in a number of ways, reflecting the complexity underlying behaviours. A list of all the barriers identified is available in the full research report.

Six barriers have emerged as being the most important amongst consumers with low levels of existing engagement with the broadband market. These barriers were identified as key due to their prevalence and impact on engagement relative to other factors.

Factor	Barrier to engagement with the broadband market
<b>Capability</b>	<p><b>Low levels of confidence or ability to assess broadband needs and identify a suitable package.</b></p> <ul style="list-style-type: none"> <li>• There is a common perception that broadband is a technical topic that is challenging to understand, affecting willingness to explore the market. This can manifest itself in consumers as ‘not knowing where to start’ when researching alternatives and a fear of making the ‘wrong choice’.</li> <li>• This barrier can have a heightened impact on vulnerable consumers, particularly those with mental health problems. These consumers can find both the prospect and experience of contacting providers and navigating the more complex aspects of the broadband market particularly stressful.</li> </ul> <p><i>“The thought of picking up the phone to [a broadband provider] absolutely terrifies me... I will put it off and off. I hate getting into a conversation with them about prices or technology.”</i> (Consumer with a mental health condition, 55-74, Nottingham)</p>

<p><b>Capability</b></p>	<p style="text-align: center;"><b>Lack of knowledge about how pricing works in this market.</b></p> <ul style="list-style-type: none"> <li>• There is low awareness of the link between a fixed term broadband contract and introductory pricing. This means that few consumers are aware of the need to review and renegotiate their package on a regular basis to save money.</li> <li>• There is also low awareness of how discounting and offers work in the broadband market. For example, consumers tend to be unaware that the best offers are not always advertised and that it may be necessary to contact providers to access the best prices or deals.</li> <li>• Low levels of effective communications about current and alternative packages, e.g. a lack of end-of-contract notifications (ECNs), exacerbate this, leading to an absence of prompts to consider how cost in the market works. <i>“I think it’s deliberate on the part of the company not to let you know, just to let things run, it’s a bit frustrating and disappointing”</i> (Female, 35–54, Belfast)</li> </ul>
<p><b>Opportunity</b></p>	<p style="text-align: center;"><b>Lack of effective communications about current and alternative packages.</b></p> <ul style="list-style-type: none"> <li>• An absence of communications from current providers about alternative deals their customers could access means many are unaware that they exist.</li> <li>• Participants noted that they rarely received personalised information from their provider beyond bills. Marketing about alternative packages was felt to be generic, often including additional products and services from the supplier (e.g. mobile SIM cards or TV channels), rather than being genuine customer engagement.</li> <li>• In this context, consumers can be prevented from accessing an alternative deal with their provider, assuming that alternative options are only available for new customers. Others are aware that these deals are available, but can be put off by the prospect of having to negotiate or ‘haggle’ with their providers to get these deals. <i>“[I] get the feeling they don’t have the authority [to offer deals to customers] – they have this deal or have that deal.”</i> (Female, 35–54, Belfast)</li> </ul>
<p><b>Motivation</b></p>	<p style="text-align: center;"><b>Belief that the current service is ‘fine’.</b></p> <ul style="list-style-type: none"> <li>• Most research participants tended to feel largely satisfied with their broadband package. Whilst this belief matched the experience of some, others who held this view were experiencing problems with their service or potentially paying relatively high prices.</li> <li>• This satisfaction was therefore in the context of some experiencing regular service issues, low awareness of the cost of their package, and uncertainty about whether or not it constitutes a good deal. Consumers normalise service issues, through an acceptance of broadband variability and an assumption that other customers receive the same quality of service.</li> <li>• This leads to a lack of perceived need to either save money or seek out a higher quality service and can lead to complacency or inertia, undermining potential future engagement. <i>“...there are no problems so I will just let it roll [on] until it doesn’t work for me.”</i> (Female, 35–54, London)</li> </ul>
<p><b>Motivation</b></p>	<p style="text-align: center;"><b>Belief that changing provider may lead to worse service.</b></p> <ul style="list-style-type: none"> <li>• Motivation to engage can be affected by the belief that a new broadband provider is not guaranteed to be as reliable as a current provider. It is difficult for consumers to judge how well a new provider will function at their address until their service has been installed and they are able to experience it.</li> <li>• This barrier was associated with the behavioural biases of loss aversion and in some cases negativity bias (where people are affected more by perceived negatives than positives). Some participants would refer to others’ poor experience, or their own past experiences as evidence for their concerns, however positive experiences did not appear to have such salience or influence. <i>“With that risk, if [the new service] was worse, I’d be kicking myself... It would be a pain; kids will be moaning if things aren’t sorted.”</i> (Female, 18–34, Colne)</li> </ul>
<p><b>Motivation</b></p>	<p style="text-align: center;"><b>Belief that engagement may lead to unexpected costs.</b></p> <ul style="list-style-type: none"> <li>• Whilst many participants felt that engagement should lead to a good value package in <i>principle</i>, they were uncertain about whether this would be the case in <i>practice</i>.</li> <li>• There were concerns about fees and charges being included in a new package and the presence of bundling in particular makes broadband pricing seem complex. As a result, consumers do not trust their ability to navigate this or trust the market to be transparent about costs.</li> <li>• This can have a heightened impact on consumers with triple play bundles, who may feel reliant on their current provider for what they perceive to be specific discounts. <i>“The providers will try and talk you into a bigger or ‘better’ deal that you neither want or need.”</i> (Female, 55–74, Colne)</li> </ul>

There are a number of behavioural factors within these barriers, for example status quo bias, negativity bias and risk aversion. These manifest themselves in reducing engagement or placing boundaries on engagement, for example, consumers limiting themselves to engaging only with their own broadband provider rather than other providers if they want to make a change to their package. This is borne out of wanting to minimise the potential for receiving a worse service, paying more for a service or choosing the wrong package for the household.

### Potential solutions to increase engagement

Having identified the range of barriers to engagement, the research sought to explore how different solutions can be used to address the issues identified and foster engagement. We presented a number of potential solutions to participants covering interventions that are already being implemented, have been announced or are being explored for the broadband market, as well as ideas from other sectors (see table in Appendix 2). Taking the COM-B factors in turn the research identified:

#### Motivation:

- People who view their current package as ‘fine’ could be motivated to search for a better deal when they receive an **end-of-contract notification (ECN) or a notification about cheaper tariffs in the market**.
- The solutions we considered could be effective in reducing factors related to loss aversion regarding potential worse service (**line tests, broadband voluntary code and cooling off periods**) were not, individually, sufficient to address the problem. Participants believed providers may make it difficult for them to act on these rights or did not trust providers to fairly fulfil the requirements. Equally, some participants did not want to have to exit a contract and engage all over again in the market, limiting the effectiveness of some solutions.
- **Customer reviews by postcode** were considered to be useful in addressing the risk of getting a worse service, but there were concerns about how reliable they would be and that they may not account for other factors, beyond postcode location, that can affect a household’s broadband service.
- None of the solutions as presented led participants to spontaneously indicate that it would help address the consumers’ worry of the risks of unexpected costs. ECNs and data portability *could* potentially be designed in such a way to help address this barrier, but this would require further consumer testing. More broadly, addressing issues around lack of trust in the market may also have an impact in overcoming this barrier given that low trust in the transparency of the market is an underlying concern about unexpected costs.

#### Capability:

- Information on current services and on alternative packages in the **ECN** provides consumers with a starting point or a baseline to make comparisons with alternative packages. This could help where consumers have lower confidence and ability to identify broadband needs and link these to identifying the right package. In addition, **data portability** could help consumers identify the best package by helping to standardise the broadband search. However, to do so, data portability would need to be designed to take account of consumer *needs* as well as their current package and usage metrics.
- **Tools to help consumers understand what speed they need** were seen as useful to provide a benchmark against which to compare packages and could help narrow down the type of package consumers should look for. However, such tools would most likely be used by those who are already motivated to engage.

- Many participants were positive about information in the **ECN** about price changes to contracts as it would remind (or inform) consumers of a price rise once their fixed term has ended. Similarly, the inclusion of information on alternative packages may motivate consumers to engage by demonstrating possible savings that can be achieved by entering a new contract rather than rolling on their current one.

#### Opportunity:

- The **ECN** was found to be helpful in overcoming a lack of effective communications about alternative broadband packages. The **notification about cheaper tariffs in the market** was also considered helpful but further *ex ante* testing will be needed to determine its effectiveness. Both of these made clear to participants that they have the opportunity to save money and theoretically made it easier for them to take the opportunity to compare packages.

It is clear that there will be no individual silver bullet solution and that, to increase engagement effectively, there needs to be a combination of remedies that address the range of different barriers identified. Rigorous consumer testing will be essential to determine the ability of these remedies to increase engagement. For those solutions which have already been announced or introduced, they should be subject to *ex post* evaluation and follow on reviews to assess the extent to which they are delivering on their aims and to identify scope for continuous improvement. For the design of future interventions, there must be a consumer-centric approach informed by a detailed understanding of barriers that are being addressed and *ex ante* consumer testing.

#### Conclusions

This research has shown that lack of engagement in the broadband market is driven by a complex picture of interlinking factors and associated behavioural biases. It has identified six primary barriers to broadband engagement, which interact with numerous other barriers (see Appendix 1). There has historically been a greater focus on addressing barriers related to consumers' capability to engage and the opportunities for them to do so. However, this research demonstrates that motivation factors are crucial drivers behind people's behaviour and subsequent lack of engagement.

Furthermore, the research highlights that 'push' factors, such as a steep price increase, are more likely to lead consumers to engage than 'pull' factors. Notable amongst this, particularly given the plans for the roll-out of full-fibre in the UK, is that faster speed was not a 'pull' for consumers who do not have serious service issues.

In exploring the extent to which a number of solutions could be helpful in overcoming the identified barriers, it is clear that the complexity of interactions between different barriers means there is no silver bullet solution which will, individually, address all of these barriers. While expected interventions are likely to address some of the barriers that consumers face when engaging in this market, they may do nothing to counter others. The research demonstrates that a suite of complementary solutions will be required to improve engagement with the broadband market as a whole.

Looking ahead, more work will be required to identify and refine potential solutions which effectively address each of the barriers that this research has highlighted. This requires detailed *ex ante* consumer testing of any new solutions and *ex post* evaluations and reviews of measures already introduced.

# Appendix 1: Key barriers to engagement and contributing factors

COM-B factor	Barrier to engagement	Contributing factor
Capability	Lower confidence and ability to assess broadband needs and identify a suitable package	Lower technical knowledge about broadband <b>(Capability)</b>
		Belief that current service is 'fine' <b>(Motivation)</b>
	Lack of knowledge about how pricing works in the broadband market	Lack of effective communications about current and alternative packages <b>(Opportunity)</b>
		Absence of social prompts about broadband <b>(Opportunity)</b>
Opportunity	Lack of effective communications about current and alternative packages	Low understanding of opportunity to ask provider about deals for current customers <b>(Capability)</b>
		Lower knowledge, social skills and confidence for telephone engagement <b>(Capability)</b>
		Mixed social acceptability of asking providers for something <b>(Opportunity)</b>
		Belief in lack of transparency in the broadband market <b>(Motivation)</b>
Motivation	Belief that current service is 'fine'	Lack of knowledge about how pricing works in the broadband market <b>(Capability)</b>
		Lack of effective communications about current and alternative packages <b>(Opportunity)</b>
		Belief that benefits of engagement are small <b>(Motivation)</b>
		Perception of broadband as functional <b>(Motivation)</b>
		Belief engagement may lead to unexpected costs <b>(Motivation)</b>
		Belief that changing provider may lead to worse service <b>(Motivation)</b>
	Belief that changing provider may lead to worse service	Social influences of others' poor experiences <b>(Opportunity)</b>
		Belief that it's normal for broadband quality to be variable <b>(Motivation)</b>
		Negative perceptions of switching and belief in risk of service loss <b>(Motivation)</b>
	Belief that engagement may lead to unexpected costs	Confidence and ability to assess own needs and identify package to meet them <b>(Capability)</b>
		Belief in the difficulty of researching broadband packages <b>(Motivation)</b>
		Belief in lack of transparency in the broadband market <b>(Motivation)</b>

## Appendix 2: Solutions presented to participants

Solution	Description of solution discussed
<p><b>End-of-contract notification (ECN)</b> (from 2020)</p>	<p>A letter sent from a customers' current provider between 10 and 40 days before the contract ends, informing them that they are coming to the end of their contract. It would also include: the date the contract ends; the services currently provided; the current monthly price paid; the monthly price that will come into effect once the fixed contract term ends; a statement that early exit fees no longer apply from the point at which the contract ends; any applicable notice period; how to terminate the contract; details of other tariffs offered by your provider which might be suitable.</p> <p>We showed participants the above information and a mock letter based on one shown in Ofcom's consultation.</p>
<p><b>Data Portability</b> (subject of the Smart Data Review)</p>	<p>Consumers being able to request a 'code' containing information on their tariff, usage and end-of-contract information in a standard format. This code could be used on a third-party website to enable a comparison of packages, based on what they have now. Consumers could also allow their current provider to share this information with other broadband providers of their choice to enable them to offer a broadband package tailored to their specific broadband usage.</p>
<p><b>Broadband Voluntary Code of Practice</b> (compensation scheme introduced in March 2019)</p>	<p>The largest broadband providers are signed up to the Broadband Voluntary Code of Practice. As part of this, customers are able to exit their broadband contract without penalty if the speed they are receiving is below the minimum speed that is guaranteed in their contract. In order to exit, the customer has to notify their provider, who gets 30 calendar days to diagnose and fix the problem. If they can't improve the speed, then the customer can exit their contract. This also applies to any products bundled with the broadband service, e.g. pay TV.</p>
<p><b>Line speed checks</b> (upfront checks are not currently available)</p>	<p>The idea that before entering a new contract with a new supplier, consumers can ask for their line to be tested by them to see what speed you are estimated to receive at peak times and also the minimum guaranteed speed.</p>
<p><b>Cheaper tariff notification</b> (trials in the energy sector)</p>	<p>The idea of a communication from Ofcom (e.g. letter, email) to customers who have been out of their fixed contract for a year but have stayed with their provider and rolled it on with no changes. It would give them information about what cheaper packages are available to them from <i>alternative providers</i> and the potential savings they could make as a result of switching. They were also shown a mock-up of this letter based on the testing undertaken in the energy sector.</p>
<p><b>Knowing the speed you need</b> (Boost Your Broadband campaign and online quiz)</p>	<p>A quiz that estimates what speed consumers need in their household as well as showing them content from the Ofcom 'Boost Your Broadband' website, which is supported by Which?. This describes different types of broadband user based on household online activities.</p>
<p><b>Cooling-off period</b></p>	<p>Cooling-off periods offer customers a short amount of time to cancel their contract completely in the first few days of their subscription. The length and start date of a cooling-off period will vary between suppliers, however every provider is required to offer one. The majority of providers offer a cooling-off period of 14 days.</p>
<p><b>Customer reviews by postcode</b> (not currently available)</p>	<p>The idea of consumers being able to access a website with reviews from people in their postcode area about their broadband providers.</p>

# Britainthinks

Insight & Strategy

The logo for 'Which?' is a red square with the word 'Which?' in white, bold, sans-serif font. The question mark is slightly larger and more prominent than the rest of the text.

**Which?**

Which?, 2 Marylebone Road,  
London NW1 4DF  
Phone +44 (0)20 7770 7000  
Fax +44 (0)20 7770 7600  
Email: [broadbandengagement@which.co.uk](mailto:broadbandengagement@which.co.uk)