

Consumer engagement with the broadband market

Quantitative survey

Methodology

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+).

Results

Q1 Which of the following products/ services, if any, are you responsible for making decisions about?

Base: all respondents (2,069)

Broadband	82%
Car insurance	65%
Current account	91%
Gas/ electric	79%
Mobile phone contract	85%
None of the above	2%

Q2 Which of the following best describes your broadband package?

Base: all respondents with responsibility for broadband (1,714)

Broadband only	14%
Broadband and line rental	45%
Broadband, TV and line rental	31%
Broadband, TV, Mobile and line rental	8%
Other	2%
DK	<1%

Q3 What type of broadband do you have?

Base: all respondents with responsibility for broadband (1,714)

Standard	31%
Superfast or Ultrafast (often called Fibre or Cable)	66%
Don't know	3%

Q4 For each of the following product/ services please select which of the following statements, if any, you agree with.

Base: all respondents with responsibility for broadband and have responsibility for service in table (base size in table)

	Broadband (1,714)	Car Insurance (1,238)	Current Account (1,643)	Gas/ electricity (1,576)	Mobile phone contract (1,542)
Switching provider carries the risk of service interruptions	33%	4%	10%	12%	18%
It is complicated to try and work out what the best product/service is for me	23%	15%	13%	24%	16%
It feels risky to switch product/service because there might be hidden charges	19%	11%	11%	18%	16%
There are lots of technical terms associated with it which make researching and identifying the right product/service difficult	18%	9%	7%	14%	12%
It feels risky to change product/service because something may go wrong in the process	18%	6%	15%	13%	10%
Net: risk	44%	17%	26%	29%	31%

Base: all respondents with responsibility for broadband and hardly ever/ never make changes to contract and have responsibility for service in table (base size in table)

	Broadband (672)	Car Insurance (485)	Current Account (647)	Gas/ electricity (619)	Mobile phone contract (612)
Switching provider carries the risk of service interruptions	36%	4%	11%	13%	22%
It is complicated to try and work out what the best product/service is for me	25%	15%	13%	27%	18%
It feels risky to switch product/service because there might be hidden charges	21%	6%	11%	20%	19%
There are lots of technical terms associated with it which make researching and identifying the right product/service difficult	20%	9%	7%	14%	13%
It feels risky to change product/service because something may go wrong in the process	20%	6%	16%	15%	13%
Net: risk	48%	17%	27%	32%	36%

Q5 For broadband, please indicate which of the following actions, if any, you have done in the last 12 months.

Base: all respondents with responsibility for broadband and have hardly ever/ never made changes to their contract (672)

Looked at what other deals were available with your provider	16%
Checked information in contract (e.g. cost, what you're getting)	16%
Contacted provider because of service problems/issues	16%
Checked when the contract ends	15%
Negotiated with your provider for a better deal (un/successfully)	15%
Contacted provider to ask if you can get a cheaper price for existing service	13%
Read reviews of other providers	13%
Checked what products/services were available directly from other providers	12%
Phoned your provider after a price increase to try and reduce it	11%
Contacted provider to discuss alternatives/upgrades to your existing service	11%
Went on a comparison website to look at different products/services from different providers	10%
Changed your service with your current provider	8%
Switched to another provider	5%
NET: Looked at what other deals were available with provider/Went on a comparison site to look at packages from other providers/Checked directly with other providers about packages	28%
NET: Contacted provider to ask if can get cheaper price for existing service/Discuss alternatives or upgrades to existing service	20%
NET: Went on comparison site to look at different products/ Services from different providers/checked directly with different providers about products/services	17%
NET: Switched to another provider/Changed services with current provider	13%

Q6 How often have you made changes to your broadband when the contract has come to an end? This could be switching to a new provider, or sticking with your provider but changing your service in some way (e.g. cost, or changes to what you receive).

Base: all respondents with responsibility for broadband and not in the first contract (1607)

Always make changes when the contract ends	19%
Sometimes make changes when the contract ends	34%
Hardly ever make changes when the contract ends	24%
Never make changes when the contract ends	17%
DK	7%
Net: Always/Sometimes	53%
Net: Hardly ever/Never	41%

Q7 Why do you hardly ever/ never make changes to your broadband contract when it ends?

Base: in table

	All who never or hardly ever make changes to their broadband contract (672)	All who never or hardly ever make changes to their broadband contract and have triple play (216)
I am happy with my provider/the package, so no need	50%	52%
I don't want to move from my provider	25%	28%
It would be annoying to "unbundle" the services I have with my provider	n/a	27%
There isn't a big enough benefit to make it worthwhile switching package	23%	24%
I worry that I would switch and then would get a worse connection (speed/reliability)	23%	24%
I worry about losing internet access when changing broadband packages	16%	18%
I can't switch my broadband as I have it in a bundle with other services	n/a	15%
The quality of connection (speed and reliability) doesn't differ much between providers	14%	14%
I worry about hidden charges or 'exit fees' when changing broadband packages	13%	13%
It is stressful to review whether I'm on the best broadband package	11%	12%
I don't trust other providers to deliver the advertised broadband speeds	11%	11%
I don't feel knowledgeable enough to find and assess what is the best deal for my household	9%	10%
I would have the same connection issues regardless of my provider or whether I changed package due to location or building issues	7%	3%
I don't want to have the inconvenience of an engineer come out	7%	6%
I don't have enough time to find and assess broadband packages	7%	5%
I don't want to talk to my provider on the phone	6%	5%

Q8 You said that you sometimes change your broadband package when the contract ends. Why do you sometimes do this and not always?

Base: in table

	All respondents who sometimes make changes to their broadband contract (535)	Triple play respondents who sometimes make changes to their broadband contract (152)	Quad play respondents who sometimes make changes to their broadband contract (51) <i>Caution small sample</i>
I only tend to change it when there's been a price increase that's not acceptable	53%	55%	52%
Sometimes there isn't a big enough incentive to change it (e.g. cost saving or what I get for my money)	45%	45%	44%
I only tend to change it when I've had problems with the service (e.g. no service, slow speeds)	24%	22%	10%
I only tend to change it when I want to change a specific part of the package (e.g. TV channel, speed)	14%	19%	30%
Sometimes I find it too much effort	14%	12%	5%
I don't always have the time to research	9%	6%	7%
I don't always have time to arrange the switch to another package	7%	7%	11%
I only tend to change it when I move home	6%	2%	5%
Other	3%	1%	0%
DK	3%	3%	9%
Net: I don't always have time to research/arrange the switch to another package	12%	10%	17%
Net: I only tend to change when I move home/ when there's been an unacceptable price increase/when I've had problems with the service	66%	67%	56%

Q9 Thinking about the times you have made changes to your broadband contract when it has ended: to what extent do you agree or disagree with these statements?

Base: All who always or sometimes make changes to their broadband contract (830)

	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	DK	Net agree	Net disagree
I prefer to take out a new contract with the same provider than switch to another provider	15%	31%	29%	12%	11%	1%	46%	23%
I will switch to a different provider only if they offer a vastly better deal than my current provider	40%	37%	11%	7%	3%	1%	77%	11%
I don't want to switch to another provider as I worry I won't get as good a broadband service (speed and reliability)	11%	28%	20%	18%	21%	1%	40%	39%
I find it stressful talking directly to my provider about making changes to my package	11%	26%	19%	18%	26%	1%	37%	43%

Q10 To what extent do you agree or disagree with the following statements about broadband?

Base: All respondents with responsibility for broadband (1714)

	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	DK	Net agree	Net disagree
If my broadband works fine there is no reason to review, at the end of the contract, that it's the best package available for my household	12%	26%	23%	20%	16%	3%	38%	36%
I don't feel confident in my ability to assess what broadband package I need and identify a suitable package	5%	17%	20%	21%	33%	3%	23%	54%
Providers have new/ alternative deals for current customers that aren't advertised	19%	35%	20%	5%	2%	19%	53%	7%
The only way to get a better deal with your provider is to threaten to leave	27%	40%	17%	8%	3%	4%	67%	12%
It is better to enter a new contract when the current one ends as these offer the best value	16%	33%	30%	7%	3%	10%	49%	10%
When my contract ends my only options are between my contract to 'roll-on' with my current provider or switch to a new provider	12%	26%	22%	15%	13%	11%	38%	28%
I don't receive deals from my provider that seem relevant to me	13%	29%	33%	13%	6%	6%	43%	19%
I think my provider will try to 'oversell' me if I call them to talk about a new package/ deal	15%	30%	23%	14%	10%	7%	46%	24%

CONSUMER ENGAGEMENT WITH THE BROADBAND MARKET

	All those who say they <i>always/ sometimes</i> make changes to their broadband (830)	All those who say they <i>hardly ever or never</i> make changes to their broadband (672)
	Net agree	
If my broadband works fine there is no reason to review, at the end of the contract, that it's the best package available for my household	26%	54%
I don't feel confident in my ability to assess what broadband package I need and identify a suitable package	20%	28%
Providers have new/ alternative deals for current customers that aren't advertised	64%	45%
The only way to get a better deal with your provider is to threaten to leave	75%	63%
It is better to enter a new contract when the current one ends as these offer the best value	62%	37%
When my contract ends my only options are between my contract to 'roll-on' with my current provider or switch to a new provider	41%*	38%
I don't receive deals from my provider that seem relevant to me	43%*	44%
I think my provider will try to 'oversell' me if I call them to talk about a new package/ deal	50%	42%

* No significant difference

Q11 To what extent do you agree or disagree with the following statements about broadband?

Base: All respondents with responsibility for broadband (1714)

	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	DK	Net agree	Net disagree
It's too risky to change provider as the broadband service may be worse than I have now	13%	37%	23%	14%	10%	4%	49%	24%
I'm put off switching broadband package as I think it's likely there are hidden costs involved	6%	26%	27%	20%	16%	5%	32%	36%
It would put me off switching broadband provider if an engineer visit was required	11%	29%	21%	18%	18%	2%	41%	36%
Switching broadband to another provider is too risky because I may be without broadband for a time	11%	32%	22%	16%	15%	4%	43%	31%
There isn't a big enough benefit to switch broadband package or provider	11%	37%	22%	14%	12%	5%	48%	26%
There isn't much difference between providers for broadband packages	9%	35%	21%	19%	11%	6%	43%	29%
I don't feel confident contacting my provider to ask what offers are available	6%	18%	18%	24%	32%	2%	24%	55%
I am prepared to accept a certain level of price increase	2%	31%	27%	22%	15%	2%	34%	37%
There are not enough guarantees around speed and reliability of broadband to make me change from the package I am on	15%	36%	24%	12%	8%	5%	51%	20%

CONSUMER ENGAGEMENT WITH THE BROADBAND MARKET

	All those who say they <i>always/sometimes</i> make changes to their broadband (830)	All those who say they <i>hardly ever or never</i> make changes to their broadband (672)
It's too risky to change provider as the broadband service may be worse than I have now	42%	59%
I'm put off switching broadband package as I think it's likely there are hidden costs involved	28%	36%
It would put me off switching broadband provider if an engineer visit was required	43%*	40%
Switching broadband to another provider is too risky because I may be without broadband for a time	37%	51%
There isn't a big enough benefit to switch broadband package or provider	38%	62%
There isn't much difference between providers for broadband packages	40%	49%
I don't feel confident contacting my provider to ask what offers are available	22%	28%
I am prepared to accept a certain level of price increase	34%	34%
There are not enough guarantees around speed and reliability of broadband to make me change from the package I am on	46%	61%

* No significant difference

Q12 You said your broadband was bundled with other services. Which was the most important element of the package when choosing your provider?

Base: in table

	Triple/ Quad (665)	Triple play (530)	Quad play (135)
Broadband (e.g. quality, speed, cost)	39%	38%	40%
TV package (e.g. channels, cost)	33%	35%	25%
Landline/phone (e.g. free calls, cost)	4%	4%	3%
Mobile (e.g. handset data, calls)	1%	1%	4%
There wasn't one part that was most important	22%	21%	27%
Don't know	1%	1%	1%

Q13 To what extent do you agree or disagree with the following statements about having your broadband bundled with other services (e.g. TV, phone package)?

Base: All with triple play or quad play broadband package (665)

	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	DK	Net agree	Net disagree
Separating the services in my bundle would be inconvenient	27%	39%	19%	7%	5%	4%	66%	12%
Having a bundle is better value than contracting for each service separately	31%	40%	17%	3%	1%	8%	71%	4%
It is possible to get just a TV package with my provider, and get my broadband from elsewhere	33%	28%	11%	3%	4%	20%	61%	7%
As long as my provider has the TV package I want then I'll continue to get my broadband from them	18%	34%	25%	14%	8%	1%	52%	22%
My broadband package isn't as important as my TV package	7%	16%	25%	26%	25%	1%	23%	51%
I don't know what each part of my bundle costs individually	17%	27%	14%	17%	24%	1%	44%	40%
I know what the total cost of my bundle is	57%	30%	6%	5%	2%	1%	87%	7%

Q14 To what extent do you agree or disagree with the following statements about superfast broadband?

Superfast broadband (sometimes called Fibre broadband) is defined by Ofcom (the regulator) as a connection with a minimum download speed of 30Mbps. Superfast broadband offers significantly faster speeds than standard broadband, for example on some superfast broadband packages you can download films and music more than nine times faster than using standard broadband.

Base: All standard broadband customers and customers who don't know what type of broadband they have (589)

	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	DK	Net agree	Net disagree
I don't want the speeds offered by superfast broadband	11%	21%	28%	20%	16%	3%	32%	37%
Superfast broadband is much more expensive than standard broadband	34%	37%	12%	3%	2%	13%	70%	5%
I don't think I have superfast broadband available in my area	15%	17%	13%	14%	19%	21%	32%	34%
Superfast broadband isn't enough of an incentive to make me switch package	26%	36%	20%	9%	5%	4%	62%	14%
Superfast broadband is a premium product that I don't need	27%	33%	20%	9%	6%	5%	60%	15%
I don't believe that I would get the speeds that are advertised	25%	39%	20%	6%	2%	7%	65%	8%

Q15 To what extent do you agree or disagree with the following statements?

The Government wants all of the UK to have full-fibre broadband by 2033. This will mostly be delivered by commercial companies, such as Openreach and Virgin Media. The roll-out of full-fibre will require engineers to visit people’s homes to replace the copper telephone wires inside and outside the home (which are currently used to deliver broadband, including most of superfast broadband) with fibre optic cables, which are necessary for full-fibre broadband. Your home phone will also work through the fibre.

The Government wants to do this because full-fibre broadband can deliver extremely high speeds for broadband; is more reliable than current broadband (such as superfast broadband) which uses copper telephone wires; it experiences fewer operating faults than copper based networks; is cheaper to maintain and operate; and less likely to slow down when many people use the network. These connections will help support the increasing demand and dependence on digital services, such as online video streaming and video calls.

Base: All respondents with responsibility for broadband (1714)

	Strongly agree	Slightly agree	Neither agree nor disagree	Slightly disagree	Strongly disagree	DK	Net agree	Net disagree
I was aware of the scheme to roll-out full fibre broadband across the UK (before today)	19%	26%	11%	16%	24%	3%	46%	40%
I would not want an engineer to come to my home to replace the wires that will enable full fibre broadband	8%	14%	20%	23%	32%	3%	23%	55%
It will benefit me to be able to have full fibre broadband	30%	29%	25%	6%	4%	5%	59%	10%
My current broadband connection already meets my needs, so I would not want to upgrade to full fibre	15%	28%	28%	15%	12%	2%	43%	27%
It will be beneficial for the UK to have full-fibre broadband	45%	29%	16%	3%	2%	5%	75%	4%
It would be inconvenient for an engineer to visit my home	8%	22%	18%	23%	27%	2%	31%	50%
I am worried it will cost me a lot more to have full fibre	25%	37%	17%	9%	8%	4%	62%	17%
I don’t think full-fibre will be as good as has been described	7%	23%	27%	19%	13%	10%	30%	32%
I am worried about interruptions to my broadband service during the full fibre installation process	14%	31%	23%	17%	12%	3%	45%	29%



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