

Consumer attitudes towards gigabit-capable broadband

Quantitative survey

Methodology

Yonder, on behalf of Which?, surveyed 2072 UK adults, of whom 1686 made decisions about their household broadband, between 26 and 28 June 2020. Data were weighted to be demographically representative of the UK.

This survey was conducted before the Government announcement on 25 November 2020 that the target for gigabit-capable roll-out has been changed to a minimum of 85% coverage by 2025.

Survey results

Q To what extent do you agree or disagree with each of the following statements about gigabit-capable broadband?

The Government has a target to deliver a new type of broadband connection called ‘gigabit-capable broadband’ nationwide by 2025. This broadband technology will provide faster speeds (up to 1Gbps, which allow users to download a high-definition film in under a minute) and a more reliable service. These connections are also less likely to slow down when lots of people use them at the same time. These connections will help support the UK’s increasing demand for and dependence on digital services, such as online video streaming and video calls.

‘Gigabit-capable broadband’ is usually provided using:

- **Full fibre:** uses fibre optic cables all the way from the exchange to your house. It doesn’t use any copper cables, unlike other broadband connections.

However, it can also use other technologies:

- **Cable:** uses a combination of fibre and other types of cables.
- **5G:** 5G is the next generation of wireless networks (we have had 3G and 4G). It can be used to provide wireless home broadband connections without a home phone line or engineer visit.

Table 1: Base: all respondents who make decisions about broadband in their household (1686)

	Net agree	Neither agree nor disagree	Net disagree	Don’t know
I expect gigabit-capable broadband to be significantly more expensive than my current broadband connection	75%	12%	4%	9%
I am unlikely to switch to a gigabit-capable broadband package if it is more expensive than my current package	66%	19%	8%	7%
I would like to know more about gigabit-capable broadband	60%	26%	11%	4%

Q Gigabit-capable broadband offers:

- speeds which are significantly faster than those provided by current broadband technology
- a more reliable connection (i.e. you are much less likely to experience buffering and/or service drop outs and more people in the household can use it at once without affecting the quality).

In most circumstances an engineer will have to visit your home to install gigabit-capable broadband.

With the above in mind, to what extent do you agree or disagree with the following statements?

Table 2: Base: all respondents who make decisions about broadband in their household (1686)

	Net agree	Neither agree nor disagree	Net disagree	Don't know
I would benefit from having gigabit-capable broadband	34%	30%	24%	12%
I don't understand the benefits of upgrading to gigabit capable broadband	31%	25%	41%	3%
The benefits of gigabit-capable broadband are not worth any additional cost	42%	29%	17%	12%
I would be willing to pay more than I do now to have gigabit capable broadband	18%	24%	53%	5%
The broadband I currently have meets my needs in terms of speed and reliability	72%	15%	12%	1%
I don't trust broadband providers to deliver faster speed and a more reliable service	29%	37%	29%	4%
I don't want someone to come to my home to install a new connection	22%	33%	42%	3%

The following groups are less likely to say that they are willing to pay more than they do now for gigabit-capable broadband:

- those aged 45+ years compared to those aged 44 years or under (12% vs 33%)
- those whose combined annual incomes is below £34k compared to those where it is £34k or over (14% vs 25%)
- those who say they hardly ever/never check whether they're on the best package for their needs at the end of their contract, compared to those who say they sometimes or always do (12% vs 19%).

Those who have never switched are more likely to agree that they don't want someone coming to their home to install a new connection than those who say they always switch (31% v 19%). A quarter (26%) of those who say they have standard broadband agree that they don't want someone coming to their home to install a new connection (no significant difference to those on superfast – 21%).

Q Imagine your current broadband contract was coming to the end, and gigabit-capable broadband was available in your area. How likely would you be to switch to a gigabit-capable broadband package?

Table 3: Base: all respondents who make decisions about broadband in their household (1686)

Very likely	10%
Fairly likely	30%
Not very likely	27%
Not at all likely	9%
Don't know	23%
Net: Likely	40%
Net: Not likely	37%

Statistical analysis of likelihood to indicate interest in adopting gigabit-capable broadband.

A proxy of the likelihood of Gigabit adoption was created by combining multiple responses into an aggregated score. These responses included stated likelihood to switch, attitudes towards benefits and monetary costs of Gigabit.¹

Using a multivariate regression approach² the following factors are significant in determining proxy likelihood in our sample:

- People who indicate that their broadband is completely meeting their needs are less likely to take up gigabit broadband than people whose current broadband does not completely meet their needs.
- People aged 65 years or older are less likely to take up Gigabit Broadband than people aged 18 to 64 years.
- People on household incomes less than £28,000 are less likely to take up gigabit broadband than people living in households with more than £28,000.
- People on standard broadband or don't know their internet speed are less likely to take up gigabit broadband than people who have superfast broadband.
- Single or couple households and small households (four or fewer) are less likely to take up gigabit broadband than people living in households which have 5 or more people. No difference was found between single/couple households and small households which have 3 to 4 people

The following variables were tested, however were not significant:

- Educational status
- If they have children under 18 years
- Marital status
- Nations

The following variables had one category that was significant, however the category had a small sample size and hence was not robust to form a conclusion:

- Working status pre-lockdown
- Rural/urban classification

¹ Questions used: Likelihood of gigabit broadband; Unlikely to switch to gigabit capable broadband; Would be willing to pay more than I do now for gigabit capable broadband; I don't understand the benefits of upgrading to gigabit capable broadband; The benefits of gigabit capable broadband are not worth any additional cost. To create an aggregated scale, variables were standardised to the same scale, ranging between 0 and 10 and moving in the same direction. The question on likelihood to switch to gigabit-broadband was scaled up as there are only 4 responses compared to the other questions which have 5 possible responses. Responses for all other questions other than willingness to pay more were reversed so that the responses which indicated least likelihood has the largest values. A Cronbach's alpha test was implemented to check whether combining the responses was a valid approach. The typical heuristic is that a value more than 0.7 indicates reliability of the composite measure, for these 5 variables an alpha value of 0.82 was found.

² The regression analysis is based on unweighted data.

Q Before today, which of the following, if any, were you aware of?

Table 4: Base: all respondents who make decisions about broadband in their household (1686)

	Yes aware (net)	No – not aware	Don't know
That the government are intending to deliver gigabit-capable broadband across the whole of the UK	34%	63%	2%
The term gigabit-capable broadband	33%	65%	2%

Broadband experience during COVID

Q To what extent, if at all, do you agree or disagree with the following statements about your broadband service during the COVID-19 lockdown?

Table 5: Base: all respondents who make decisions about broadband in their household (1686)

	Net agree	Neither agree nor disagree	Net disagree	Don't know
I've experienced more problems with my current broadband service during lockdown than I did before	25%	18%	56%	1%
My connection has become less reliable during lockdown	24%	18%	57%	1%
My connection has met my needs, even during lockdown	73%	14%	12%	1%
I am using the internet more than usual due to lockdown which has resulted in problems with my broadband service	34%	23%	42%	1%
I am more likely to upgrade my broadband speed since lockdown	18%	31%	48%	3%

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