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Ofcom Broadband Speeds Voluntary Code of Practice Mystery Shopping Results

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1. Executive Summary

1.1 Introduction

In 2008 Ofcom introduced a Voluntary Code of Practice on Broadband Speeds (the 'Code') with the aim of improving the quality of information on broadband speeds available to consumers. The Code first came into effect in December 2008 and was subsequently revised in July 2010, with new requirements coming into force in July 2011. All of the UK's largest ISPs have signed the Code (a full list of signatories is available on the Ofcom website).[1]

1.2 Methodology & Sample

The aim of the research, conducted between December 2011 and January 2012, was to produce a robust analysis of compliance with elements of the Code of Practice through the telephone and internet sales routes. The research included mystery shopping by fully trained mystery shoppers who visited the websites of the ISPs and also called the ISPs over the telephone. This provided robust quantitative analysis and the research was designed to enable analysis of levels of compliance by ISPs signed up to the Code and reporting on levels of compliance by large and medium-sized ISPs individually.

In addition, a more thorough assessment of each ISP's website was carried out by GfK's executives in order to give a fuller picture of the compliance of each website with the Code.

Only ISPs who signed up to either the 2008 or 2010 Code of Practice and who have home broadband services were included in the research. The ISPs researched were considered as different groups. Large ISPs were BT Total Broadband, Plusnet, Talk Talk, Sky and Virgin Media (cable). Medium ISPs were BT Infinity, Karoo, Orange, O2 and Virgin Media DSL. Small ISPs were Demon, Eclipse, Fast.co.uk, Firenet, Green ISP, intouch systems, IDnet, MacAce, Rutland Telecom, Vivaciti and Zen.

1.3 Objectives

The focus of the mystery shopping research was to check compliance with certain aspects of the Code of Practice which requires ISPs:
- to provide customers with an estimate of the maximum speed they can get – this should be presented in the form of a range equivalent to the line speeds achieved by the 20th to 80th percentiles of the ISP's similar customers (i.e. customers with similar line characteristics);
- to explain why the maximum speed possible may not always be achieved in reality;
- to provide the above information as early as is practicable in the sales process, and at least before a contract is entered into; and
- to make information about traffic management policies available.

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[1] http://stakeholders.ofcom.org.uk/telecoms/codes-of-practice/broadband-speeds-cop-2010/

1.4 Key Findings

The key findings of the study are summarised below and can be found in more detail in the rest of the report.

Some sort of speed estimate was given to the large majority of mystery shoppers during the telephone enquiry; either a range or a mid-point estimate.
- During 93% of telephone enquiries made, at least one of a mid-point estimate or a range of speeds were given to the mystery shopper[2]
- Plusnet, O2 and Sky have all significantly increased the proportion of enquires that result in a speed estimate compared to the results of a similar study in 2009.
- Calls to the Small ISPs (14%) were more likely to end without a speed estimate being provided and with no identifiable reason[3] for this, than the calls to the Medium (4%) or Large ISPs (3%).
- Among the Medium and Large ISPs, Virgin Media DSL (6%) and BT Infinity (7%) were more likely to end calls without providing a speed estimate and with no identifiable reason for this.

Less than three quarters of mystery shoppers were given a range of speeds over the telephone.
- Large and medium providers were most likely to provide a range of speeds.
- Sky and Karoo were the most likely to provide the estimated speed ranges, with at least 90% of callers being given a range estimate over the telephone.
- The remaining providers gave a range in less than three quarters of the calls made to them: Talk Talk, O2, Plusnet, BT Total Broadband and Virgin Media DSL.

Over half of the mystery shoppers received speed estimates without prompting over the telephone.
- Overall, 59% of mystery shoppers received speed estimates without prompting. Karoo (76%), Sky (72%) and PlusNet (67%) were most likely to provide speed estimates[4] without prompting from the mystery shoppers.
- TalkTalk (47%), BT Total Broadband (48%) and Orange (52%) were significantly less likely to provide unprompted speeds information than the three strongest performing ISPs on this measure[5].
- Plusnet, Sky and BT Total Broadband all significantly increased the proportion of calls that resulted in a speed estimate being given unprompted compared to the similar research in 2009.

 87% of mystery shoppers were given speed estimate information during their website check.

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[2] ISPs who have signed up to the 2008 Code of Practice but no t to the 2010 updated Code (which requires a range rather than a mid-point estimate to be provided) have been removed from range data analysis (Zen, Orange, BT Infinity). Virgin Media cable has also been excluded in the speed data analysis as the Code does not require cable operators to provide a speed estimate.

[3] There are known reasons why particular customers cannot be offered a speed over the telephone or online, e.g. if the mystery shopper's own supplier had unbundled their telephone and broadband service, or an operator does not offer services in that area.

[4] They were significantly more likely to provide unprompted information on speeds than 4 or more of the lower performing ISPs

[5] TalkTalk (47%), BT Total Broadband (48%) and Orange (52%) were significantly less likely to provide unprompted speeds information than Karoo, Sky and Plusnet. O2 (55%), BT Infinity (57%) and Virgin Media DSL (57%) were also less likely to offer this information without prompting than at least 2 of the higher performing ISPs.

- Compared with the 2009 research, BT Total Broadband, Plusnet, Sky and Virgin Media all significantly increased the proportion of visits that gave the mystery shopper a speed estimate on the website.
- Small ISPs (19%) were more likely not to give a speed estimate than Large ISPs (3%) and Medium ISPs (7%).[6]
- PlusNet (1%), Karoo (1%) and BT Total Broadband (0%) were less likely to end their website check without gaining a speed estimate compared to Orange (17%), O2 (9%) and Talk Talk (6%).

Just less than three quarters of mystery shoppers were given a speed estimate in the form of a range during the website check.
- 72% of mystery shoppers who completed a web check were given a range of estimated speeds.
- Sky (95%), Karoo (99%) and BT Total Broadband (97%) were significantly more likely to provide a speed range on their website than the 4 lowest performing ISPs, who were O2 (74%), Plusnet (79%), Talk Talk (88%) and Virgin Media DSL (88%).

When comparing speed ranges given on the telephone and during the website check, 84% were within 1Mbit/s of each other.
- Sky was more likely than any other ISP to provide speeds on their website and over the telephone that were within 1Mbit/s of each other (96%).BT Total Broadband (73%) and O2 (76%) were less likely to provide online and telephone speed estimates within 1MB of each other. This was driven by the fact that some consumers were offered ADSL Max (which provides lower but more stable speeds) through one sales route, but not the other.

34% of mystery shoppers were told some information about what can affect their broadband speed.
- 61% of those given some information about what can affect their broadband speed were advised that speed would be affected by how busy the network was and 53% were advised that speed would be affected by how far the connection was from the telephone exchange.
- Sky provided information about what factors can impact the speed received during significantly more mystery shops than any other ISP (59% of the time).
- Callers to Virgin Media DSL (21%) and BT Infinity (11%) were least likely to be told this kind of information.

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[6] Note that this data only includes where it should have been possible for a speed estimate to be provided. In some cases it is not possible for a speed estimate to be provided, for example because the mystery shopper's home number is not recorded on the Openreach line characteristics database (this can be the case when they mystery shopper's own ISP has unbundled their telephone and broadband service), or when an ISP does not offer a service to consumers due to their line characteristics or geographic location.

2. Introduction to the Research

2.1 Overview of Ofcom's Broadband Speeds Voluntary Code of Conduct

In 2008 Ofcom introduced a Voluntary Code of Practice on Broadband Speeds (the 'Code') with the aim of improving the quality of information on broadband speeds available to consumers. The Code first came into effect in December 2008 and was subsequently revised in July 2010 with new requirements coming into force in July 2011. All of the UK's largest ISPs have signed the Code (a full list of signatories is available on the Ofcom website[7]).

Below provides a summary of the principles of the Code[8].

The eight principles of the Code

1. Training
ISPs agree to provide full training on how to implement the Code to people selling their broadband services. This includes not just their own people, but any agents or others such as shop staff.

2. Information where broadband is sold
Some ISPs use technology that means customers may not be able to get the maximum advertised speed. If so, these ISPs should:

- give customers an estimate of the maximum speed they can get in the form of a range equivalent to the line speeds achieved by the 20th to 80th percentiles of the ISPs similar customers (i.e. customers with similar line characteristics);
- provide a 'line checker' on their website that estimates the maximum speed a customer can expect, and make sure this figure is clearly shown;
- not accept an order until a customer has been told their estimated speed; and
- give customers speed information in writing, or in a 'My account' section on their website or remind the customer to write the estimate down.

Every ISP must:

- explain clearly and simply how other technical factors may slow down the speed that users get; and
- avoid abusing the trust of vulnerable customers who may not understand what they're being told.

3. Up-to-date, accurate information
ISPs must do what they can to ensure that what they display on their line checkers is up-to-date and accurate. Ofcom will work together with the industry to help make sure that this is the case.

4. Dealing with speed problems
When ISPs use technology that means that customers may not get the maximum advertised speed, they should:

- have trustworthy systems to find the cause of speed problems when customers report them, and log any faults;

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[7] http://stakeholders.ofcom.org.uk/telecoms/codes-of-practice/broadband-speeds-cop-2010/list-of-isps-2010
[8] The full code is on Ofcom's website at http://stakeholders.ofcom.org.uk/telecoms/codes-of-practice/broadband-speeds-cop-2010/code-of-practice

- give help and advice if customers can do something themselves to improve the situation; and
- allow consumers the option to leave their contracts early without penalty (within three months of signing up to the service) if they receive a maximum line speed that is significantly below the estimate they are given at point of sale and the ISP is unable to resolve the problem.

Every ISP must:

- have trustworthy systems to find the cause of a speed problem; and
- take steps to fix any issue that is down to them.

5. Giving information on websites
Many ISPs have a 'fair use' policy which may mean consumers can only use the service within certain limits. Others may also take steps to manage the highs and lows of 'traffic' on their networks. If they do, the Code says that they should explain their rules clearly on their website, in an obvious place (such as in 'Frequently Asked Questions'). They should, where possible, help customers to measure usage, and email details of any penalties for going over the limit.

6. Making things happen
ISPs should adopt the principles in the Code, in full, within 12 months of signing up.

7. Complying with the Code
The Code also sets out Ofcom's intention to monitor compliance with the Code by carrying out mystery shopping.

8. Customers and the Code
ISPs are also required to inform customers that they have signed-up to the Code, and publish the details on their website.

The 7th Principle of the Code sets out Ofcom's commitment to monitor ISPs signatories' compliance with the Code through a number of methods, including mystery shopping. This research is carried out as part of the 7th Principle of the Code of Practice.

2.2 Overview of Methodology

2.2.1 Overview

A key objective of the Code of Practice on Broadband Speeds is to help ensure consumers are able to choose the broadband package which is most appropriate for them based on their individual requirements and needs. The Code of Practice on Broadband Speeds is a voluntary industry Code and is overseen by Ofcom.

The questionnaire was designed in a similar fashion to the previous study conducted in 2009[9] with additional questions added to gather information related to the updated Code of Practice, thus ensuring that as much supporting evidence could be gathered for each aspect of the Code as possible. Most of the new questions that were added aimed to gather more information about the speed ranges that were given than in the previous study. Comparisons with the previous study have been made within this report where relevant.

2.2.2 Aims

The aim of the research was to produce a robust analysis of compliance with elements of the Code of Practice through the telephone and internet sales routes. Therefore the research included mystery shopping by fully trained mystery shoppers who visited the websites of the ISPs and also called the ISPs over the telephone. This provided robust quantitative analysis and the aim was to report on ISPs signed up to the Code overall and also individual reporting on large and medium ISPs.

In addition, a more thorough assessment of each ISP's website was carried out by GfK's executives in order to give a fuller picture of the compliance of each website in relation to the Code. This is referred to as the web audit in this report.

Only ISPs who signed up to either the 2008 or 2010 Code of Practice and who have home broadband services were included in the research. The ISPs researched were considered as different groups. Large ISPs were BT Total Broadband, Plusnet, Talk Talk, Sky and Virgin Media (cable). Medium ISPs were BT Infinity, Karoo, Orange, O2 and Virgin Media DSL. Small ISPs were Demon, Eclipse, Fast.co.uk, Firenet, Green ISP, intouch systems, IDnet, MacAce, Rutland Telecom, Vivaciti, and Zen.

2.2.3 Mystery shopping

The methodology used was a quantitative mystery shopping study which measured speeds shown on the website speed checker facility and speeds mentioned by the telephone call centre, as well as other related information given in these calls.

Mystery shoppers were not customers of the ISP they contacted and were told to phone the most appropriate number (e.g. New Customers or Sales Enquiries) to conduct the telephone assessment. Mystery shoppers were provided with a full set of briefing notes (see Annex 2: Questionnaire & Briefing Notes) and a questionnaire to complete for each assessment they made.

During the telephone stage of their assessment, mystery shoppers were instructed to telephone the ISP (using the telephone number given on their website for new customers/enquiries) and pose the question 'I'm thinking of moving my broadband, can you tell me what your current deals are?' Mystery shoppers were asked to prompt for speed information should it not be volunteered during

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[9] Previous study conducted in October & November 2009. See link for final report:
http://stakeholders.ofcom.org.uk/binaries/telecoms/cop/Synovate_report.pdf

the telephone call, i.e. if they were not told this information before they perceived the next step to be signing up for the deal or giving their Migration Access Code (MAC).

During both the website speed check and the telephone enquiry, mystery shoppers recorded information about any speed estimates they were given (mid-point estimates or ranges) and related information they were told. Whether they had to prompt for the speed estimates was also recorded. Additionally, the shoppers recorded if the Code of Practice was mentioned and the response given if they asked the sales advisors what happened if their broadband speed was lower than the estimates provided. To provide further context to the findings, mystery shoppers were also asked to provide explanatory comments for certain responses and examples of these have been provided in this report where appropriate to give additional understanding of the outcome.

A total of 1,369 mystery shops were completed between 17 December 2011 and 19 January 2012 across a range of ISPs providing cable and DSL services. Mystery shoppers were located across England, Wales, Scotland and Northern Ireland. The research was designed to ensure that shoppers were widely spread across the UK and in a variety of areas (in terms of nation, rurality, level of broadband competition, etc). However, this research is not designed to be representative of the UK. Rather it is designed to provide consistent comparison of different suppliers with robust sample sizes for each. The geographical footprint of different suppliers constrains the possibility of being geographically representative. Mystery shoppers used their own personal details when required such as address, postcode and phone number[10].

Website audit

To supplement the mystery shopping findings, a website audit was also carried out on 19 broadband providers to evaluate the level of information available and ease with which it is found. The website audits were conducted by an executive within the GfK team and not included as part of the mystery shopping study. An overview of the website audit results can be found later in this report with further findings for three additional mobile broadband providers who were audited on traffic management information of the audit in Annex 3: Traffic Management Web Audit results by ISP.

The audit of the ISPs' websites gathered information about the following areas of the website:
- Whether there was online speed checking facilities available
- Additional information that was available about broadband speeds
- Availability of information regarding Fair Usage Policies
- Availability of information regarding Traffic Management policies[11]

Reporting and analysis

The sample breakdown and more details of which ISPs have been analysed at each question and how this has been done can be found in Annex 1: Sample & Analysis Notes. However, it is important to note here that ISPs who have not signed up to the 2010 updated Code of Practice (which requires a range rather than a mid-point estimate of maximum speeds to be provided) have been removed from range data analysis (Zen, Orange, BT Infinity). Virgin Media cable has also been excluded in the speed data analysis as the Code does not require cable operators to provide a speed estimate.

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[10] With the exception of Karoo. See Annex 1: Sample & Analysis Notes for more details.
[11] Traffic Management policies relate to the BSG Code of Practice. For more details of this can be found in Annex 3: Traffic Management Web Audit

On some measures, comparisons have been made with Ofcom's previous research carried out in 2009[12]. Comparisons can only be made when the data and sample is very similar. Comparisons are only made for the results of individual ISPs, rather than at the 'all ISP' level because the overall sample structure differs in the current research. Not all individual ISPS were measured in both phases; therefore comparisons over time can only be made for BT Total Broadband, Orange, O2, Plusnet, Sky, Talk Talk, and Virgin Media DSL (not cable).

Within charts the summary groups of large, medium and small ISPs are reported, alongside individual ISPs where the base size is 100 or more. If a base size is lower than this, this is highlighted. There is commentary on the differences between the different sized ISPs; this refers to the ISPs as a group based on the size, rather than each individual ISP within the size band. Comments on individual ISPs are made separately.

The report draws attention only to differences between ISPs which are statistically significant to a 95% confidence interval. When comparing to the 2009 mystery shopping research, a 99% confidence interval is used, to allow for research effects.

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[12] http://stakeholders.ofcom.org.uk/binaries/telecoms/cop/Synovate_report.pdf

3. Broadband speed estimates

3.1 Broadband speed estimates

The 2nd Principle of the Code requires that ISPs provide all consumers with information on their estimated maximum (access line) speed as early as is practicable within the sales process.

The Code has always required ISPs to give customers an estimate of the maximum speed they can get, however the 2010 revision of the code specified that this should be given in the form of a range[13]. ISPs should provide customers with an estimated speed before asking for a Migration Access Code or personal financial details.

The ISPs' websites should also provide a 'line checker' that estimates the maximum speed a customer can expect – and the 2010 revision requires that this is provided in the form of a range. This figure should be clearly shown.

Therefore, in order to monitor compliance with the above requirements, this research identifies:

- the proportion of telephone calls to ISPs that resulted in an estimate of line speeds being provided to assessors;
- the proportion of calls to ISPs signed up to the 2010 code where a range of speeds, rather than a mid-point were given;
- the proportion of calls to ISPs where sales advisors gave the speed estimate spontaneously, compared to those where they had to be asked for this information;
- the proportion of visits to the ISPs' websites that result in a speed estimate being provided.

The 3rd Principle requires that information initially provided to consumers by ISPs at the point of sale is as accurate as possible. Therefore, in order to give a sense of the accuracy of the speed estimate provided by the ISPs:

- comparisons between the speed estimates provided on the phone and websites are made; and
- cases where the estimated speeds provided match the headline or advertised speeds are reported

3.1.1 Provision of any speed estimates given on the telephone

Results of the research show (see Figure 1) that in the majority of cases (93%), some sort of speed estimate was given to the mystery shopper during the telephone enquiry, i.e. in the format of a range (e.g. 5Mbit/s to 9Mbit/s) or as a mid-point estimate (e.g. 7Mbit/s).

Only 7% of telephone enquiries made ended without a speed estimate being provided to the mystery shopper[14].

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[13] The Code also states that 'Regardless of which of the above two approaches is used to calculate the range, the ISP may, where the size of the calculated range is 2Mbit/s or less, provide the customer with a single-point estimate instead of the range provided that the customer is informed that the single point estimate is only likely to be accurate within +/-1Mbit/s.'

[14] ISPs who have not signed up to the 2010 updated Code of Practice (which requires a range rather than a mid-point estimate to be provided) have been removed from range data analysis (Zen, Orange, BT Infinity). Virgin Media cable has also been excluded in the speed data analysis as the Code does not require cable operators to provide a speed estimate.

There are known reasons why particular customers cannot be offered a speed over the telephone or online. The most common reason is because the mystery shopper's own supplier had unbundled their telephone and broadband service. In these cases, the shopper's home telephone number would no longer be recorded on the BT Openreach line characteristics database which underpins almost all speed checkers. In such a case, no speed estimate could be given. The second most common reason is that an operator does not offer a service in that area.

Within the 7% of calls where no speed was provided, analysis indicated that in 2% of calls a known reason could be identified for not providing a speed estimate. Therefore, only 5% of calls to ISPs resulted in a speed estimate not being provided when it should have been possible for a speed estimated to be provided. In the rest of this section of the report, commentary focuses mainly on the percentage of calls that resulted in a speed estimate not being provided, when it should have been possible to provide a speed estimate.

Figure 1[15]: percentage of assessments where a speed estimate was/was not provided on the telephone.

ISP	% of calls providing a speed estimate	% of calls ending without a speed estimate	% of calls ending without a speed estimate – identified reason	% of calls ending without a speed estimate – no identified reason
All	93	7	2	5
Large	96	4	1	3
Medium	93	7	3	4
Small	83	17	3	14
BT Infinity	90	10	3	7
BT Total Broadband	96	4	3	1
Karoo	98	2	0	2
O2	96	4	3	1
Orange	91	9	7	2
PlusNet Broadband	99	1	0	1
Sky	93	7	3	4
Talk Talk	95	5	1	4
Virgin Media (DSL)	91	9	3	6

Source: QGen2 Was any speed information given during your call?
Base: Large 612, Medium 530, Small 127

Calls to the Small ISPs were more likely to end without a speed estimate being provided and with no identifiable reason for this (Small 14%, Medium 4%, Large 3%). At an individual ISP level, Virgin Media DSL (6%) and BT Infinity (7%) were more likely than at least 2 other ISPs to end calls without providing a speed estimate and with no identifiable reason for this.

Comparisons with Ofcom's previous research in 2009[16] identifies that Plusnet, O2 and Sky have all significantly increased the proportion of enquires that result in a speed estimate being provided over the phone; O2 increased from 80% to 96%, Sky increased from 82% to 93% and Plusnet increased from 93% to 99%.

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[15] Figure 1 analysis based on calculations provided by Ofcom derived from GfK survey data.
[16] http://stakeholders.ofcom.org.uk/binaries/telecoms/cop/Synovate_report.pdf

Mystery shoppers in this research were asked to record comments about the conversation they had during the call. The following comments are from mystery shops where a speed estimate was not provided during the call and highlight some of the themes that explain why speed estimates were not given such as, requirement of a MAC, requiring a sale to be agreed and technical issues preventing the speed checker being available.

Requiring a sale to be agreed

"The member of staff said that I would not know the speed until the order was placed." **(Large ISP)**

"No information was available by telephone. Information was only available for already registered customers or could be provided once I had signed up for the service." **(Small ISP)**

"I was told that speed estimates could only be given once I was going ahead with a purchase." **(Large ISP)**

Requirement of a MAC code

"The ISP stated that they were unable to provide speed estimates as this could vary depending on a number of factors. They could only provide me with a more accurate estimate if I provided them with my MAC code." **(Small ISP)**

Technical Issues

"The staff member said that the system which would check the speed had crashed. However, they said that the speeds offered were between 1Mit/sand 20Mbit/s." **(Medium ISP)**

3.1.2 Provision of a range of speeds

Figure 2 shows that overall, 72% of mystery shoppers were given a range of speeds during the telephone stage of their assessment. The contact with large and medium providers were most likely to provide a range of speeds: 72% of calls to Large ISPs gave a range of speeds, 75% of calls to Medium providers and 62% of calls to Small providers.

When comparing individual ISPs, Sky and Karoo were the most likely to provide the estimated speed ranges – both of these broadband providers gave an estimated range on at least 9 in 10 calls made and were significantly more likely to provide a range over the telephone than all other ISPs measured. The remaining providers gave a range in less than three quarters of the calls; Talk Talk (60%) O2 (62%), Plusnet (68%), BT Total Broadband (70%) and Virgin Media DSL (71%)

Figure 2: Percentage of assessments where a speed estimate range was given on the telephone
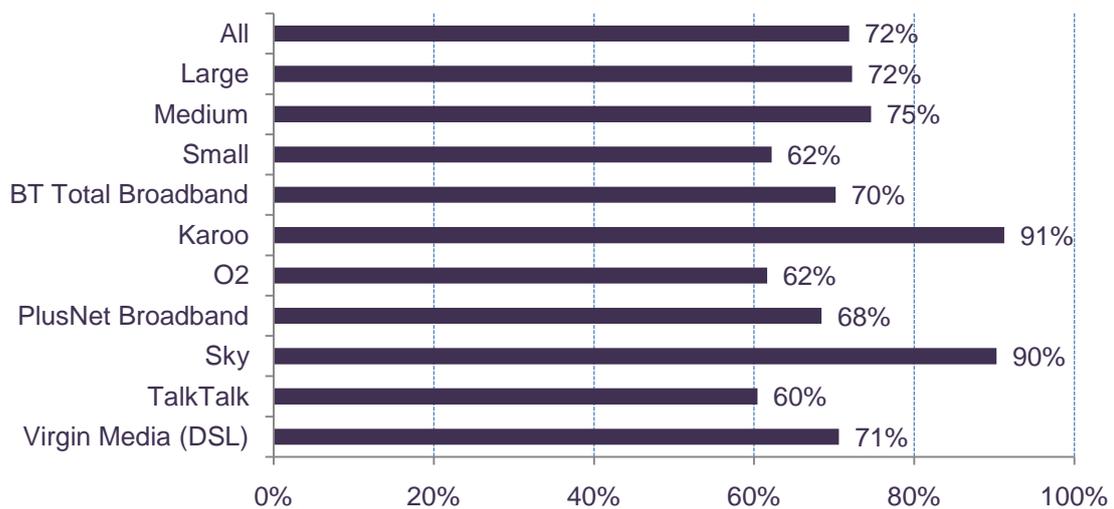
3.1.3 Unprompted or prompted speed estimates provided

Mystery shoppers were briefed when to prompt for speed estimates based on the progression of the conversation with the member of staff; in order to test for whether information was provided unprompted, speed information was not specifically asked for at the beginning of the call. If the call was perceived as being concluded by the member of staff, for example by asking for a MAC code or payment details, the mystery shopper was to prompt for a speed estimate.

Unprompted speed estimate provided during the call

Overall, 59% of broadband providers gave an unprompted speed estimate during the enquiry. There was little difference in the results when looking at the size of broadband provider; 58% of calls to Large, 59% to Medium and 61% to Small ISPs resulted in them providing unprompted speed information.

Figure 3 shows that Karoo (76%), Sky (72%) and PlusNet (67%) were significantly more likely to provide unprompted information on speeds than 4 or more of the lower performing ISPs. TalkTalk (47%), BT Total Broadband (48%) and Orange (52%) were significantly less likely to provide unprompted speeds information than Karoo, Sky and Plusnet. O2 (55%), BT Infinity (57%) and Virgin Media DSL (57%) were also less likely to offer this information without prompting than at least 2 of the higher performing ISPs.

Comparisons with Ofcom's previous research in 2009 identifies that two of the current high performers - Plusnet and Sky - have significantly increased the proportion of calls that gave the mystery shopper a speed estimate without prompting; Sky increased from 39% to 72% and Plusnet increased from 45% to 67%. Although BT total Broadband is still providing spontaneous speed estimates in a relatively low amount of calls (48%), this has increased from 28% in 2009.
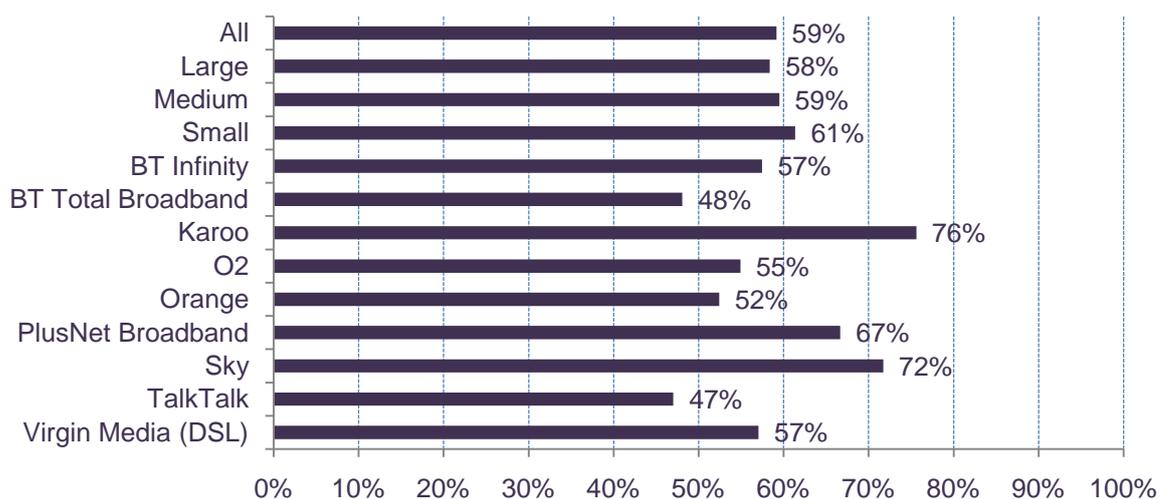
Written comments provided by the mystery shoppers in the recent research indicate that in some cases they felt that the sales staff or customer services person they spoke to had limited knowledge about broadband speeds or were more interested in other areas e.g. the package details or completing a sale.

"The call agent I spoke to showed no proficiency in speed, they only wanted to discuss inclusions and price." **(Large ISP)**

"The advisor was more interested in the sale." **(Medium ISP)**

"I felt the call agent had no idea about broadband speeds. Every reply given to me was for me to look on their website." **(Small ISP)**

Figure 3: Percentage of assessments where speed estimates provided unprompted on the telephone.

All	59%
Large	58%
Medium	59%
Small	61%
BT Infinity	57%
BT Total Broadband	48%
Karoo	76%
O2	55%
Orange	52%
PlusNet Broadband	67%
Sky	72%
TalkTalk	47%
Virgin Media (DSL)	57%

Source: QGen4 Was ANY speed information given during the phone call - UNPROMPTED? If 3.9 or 3.11 are Yes-unprompted = Yes
Base: Large 612, Medium 530, Small 127

3.2 Broadband speeds given on the providers website

Speed estimates were gathered online for each ISP using the speed checker facility found on their website. Mystery shoppers were asked to use their own details and record the speeds provided. Where the speed checker facility was not working or not available, this was noted and the mystery shopper would only complete the telephone stage of the assessment.[17]

3.2.1 Provision of any speed information during website check

Mystery shoppers used their own phone number when using the speed checker and overall, 87% were able to gain a speed estimate (either a mid-point estimate or a range of speeds) from the website during their assessment - see Figure 4.

On 13% of occasions shoppers were unable to get information for their line: either the speed checker was not working at all, or when the details were entered on the site an error message was displayed advising speeds could not be provided at that time and they were encouraged to telephone the ISP (see the examples of comments recorded by mystery shoppers below).

"When I typed my phone number and postcode in the xxx website it said it wasn't available." **(Large ISP)**

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[17] This was separate to the more thorough web audits. These are reported more fully later in the report and in the annexes.

"I was unable to confirm the line speed prior to calling the provider, the line check identified I already had broadband installed and would only allow me to enter a MAC code." **(Small ISP)**

"The site stated: There was a problem - Telephone number not found in the BT database or the number belongs to a LLU operator." **(Small ISP)**

The lack of speed estimates being given is likely to be caused in part by the issue of local loop unbundling (LLU) or cable providers providing the home telephone service of the shoppers. In these cases, the shopper's home telephone would no longer be recorded on the BT Openreach line characteristics database which underpins almost all speed checkers. In such a case, no speed estimate could be given. Another issue is that some ISPs do not offer services to some consumers because of their geographic location or line characteristics. This is particularly the case for Orange who do not sell broadband services to customers who already have fully unbundled lines – this is the case for around a quarter of broadband connections. The effect of unbundling has greater impact on estimates being given through the websites than over the telephone; e.g. because the call operators on the telephone can explain that services can be provided, but with additional charges. This is not possible on the websites.

Figure 4[18] shows the percentage of website visits that ended without a speed estimate being provided for these kinds of identifiable reasons. Orange (21%) was not able to provide a speed estimate due to this issue in around a fifth of cases. BT Infinity (14%), O2 (12%) and small operators (17%) also faced this issue in a reasonable numbers of cases. With the exception of Karoo, all other operators could not provide a speed estimate for a lower number of such shoppers – BT Total Broadband (1%), Plusnet (2%), Sky and Talk Talk (3%) and Virgin Media DSL (7%).

Commentary in this section therefore focuses on visits to the websites that did not yield a speed estimate, without any clear reasons for why this occurred.

Small ISPs (19%) were more likely not to give speed estimates (when there was no identifiable reason why a speed estimate could not have been provided) than Large ISPs (3%) and Medium ISPs (7%).

Of the Large and Medium ISPs, PlusNet (1%), Karoo (1%) and BT Total Broadband (0%) were less likely to provide speed estimates (when there was no identifiable reason why a speed estimate could not have been provided) compared to Orange (17%), O2 (9%) and TalkTalk (6%) .

BT Total Broadband, Plusnet, Sky and Virgin Media DSL have all significantly increased the proportion of visits that gave the mystery shopper a speed estimate on the website since the research in 2009; BT Total Broadband increased from 79% to 99%, Plusnet increased from 85% to 97%, Sky increased from 64% to 94% and Virgin Media DSL increased from 36% in 2009 to 91% in 2011.

Figure 4: Percentage of assessments where a speed estimate was/was not available during the website check

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[18] Figure 4 analysis based on calculations provided by Ofcom derived from GfK survey data.

ISP	% of website visits resulting in a speed estimate	% of website visits ending without a speed estimate	% of website visits ending without a speed estimate – **identified reason**	% of website visits ending without a speed estimate – **no identified reason**
All	87	13	8	5
Large	95	5	2	3
Medium	82	18	11	7
Small	64	36	17	19
BT Infinity	81	19	14	5
BT Total Broadband	99	1	1	0
Karoo	99	1	0	1
O2	79	21	12	9
Orange	62	38	21	17
PlusNet Broadband	97	3	2	1
Sky	94	6	3	3
Talk Talk	91	9	3	6
Virgin Media (DSL)	91	9	7	2

Source: QGen1 Was ANY speed information given during the web check?
*Base: Large 612, Medium 530. Small 127*

3.2.2 Speed ranges provided on website

Figure 5 shows that 72% of mystery shoppers who completed a web check were given a range of estimated speeds[19]. When compared with the average across all ISP's, Large ISPs were significantly more likely to provide this information - 90% of assessments to these providers ended with a range of speeds whereas 52% of contacts with Small ISPs and 55% of Medium ISPs resulted in the mystery shopper being given this information.

 Sky (95%), Karoo (99%) and BT Total Broadband (97%) were significantly more likely to provide a speed range on their website than the 4 lowest performing ISPs, who were O2 (74%), Plusnet (79%), Talk Talk (88%) and Virgin Media DSL (88%).

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[19] In some cases, a range estimate may have been provided, but a mystery shopper may have missed this information; potentially due to the design/layout/prominence of the figures within the text on the website.

Figure 5: Percentage of assessments where speed range estimate was provided on the website
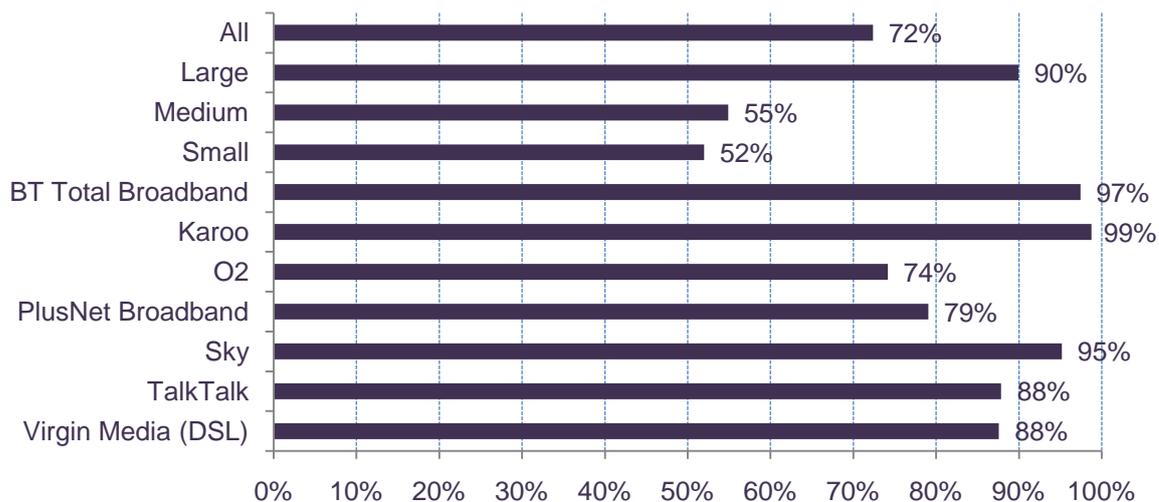
Source: Q2.7 Were you given a range of speeds?
Large 588, Medium 494, Small 97

Comparisons were made between the estimated speeds provided on the website and then during the telephone call to gain an indication for the accuracy of data being given to potential new customers[20]. The difference was calculated by averaging the absolute minimum and maximum speeds given within each contact channel and reporting on the percentage of speeds that were within 1Mbit/s of each other e.g. if they were told online that their speed range would be between 8 Mbit/s and 10 Mbit/s online but they were quoted a range of between 6 Mbit/s and 12 Mbit/s on the telephone, then the total difference is 4 Mbit/s (the direction of the difference is not considered here – it is absolute speeds).

Before making the comparison, some data cleaning took place. The analysis was undertaken only on those cases where a range had been provided both online and offline, obvious discrepancies such as fibre online and ADSL offline were removed.

Figure 6 shows that overall, 84% of the speed ranges given on the telephone and via the web check were within 1Mbit/s of each other. 3% of speed ranges given were different by more than 5Mbit/s.; 33% of the differences over 2 Mbit/s can be explained by estimates over the phone and the website being based on different ADSL offerings. From looking at the ranges given online and offline, it would seem that where an ADSL customer faced a very low speed on the standard package, they may have been be moved on ADSL Max service in one of the sales routes (ADSL offers a lower maximum speed but a more stable speed). Another 12% of these differences can be explained by one of the range estimates being 0 to headline speed (i.e. up to the advertised maximum or 'up to' speed).

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[20] Results from Figure 6 based on calculations provided by Ofcom derived from GfK survey data.

Figure 6: Percentage of speed range estimates provided on telephone and website which are within specified Mbit/s range of each other
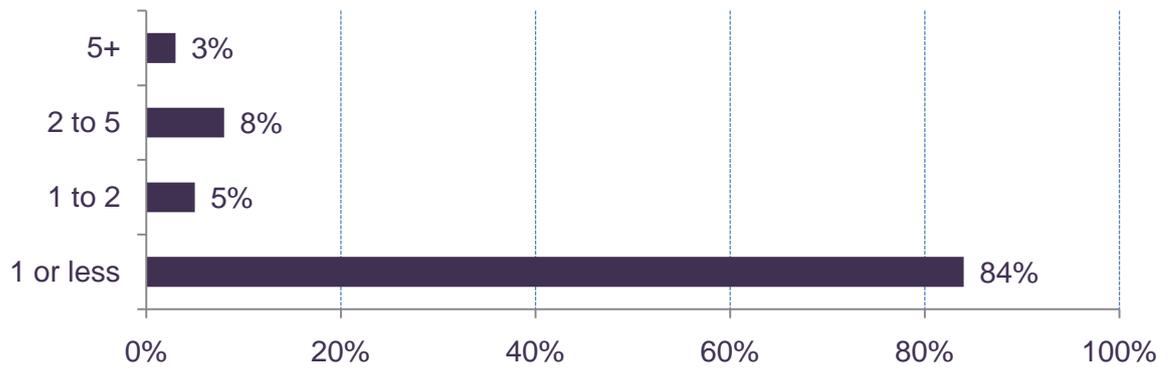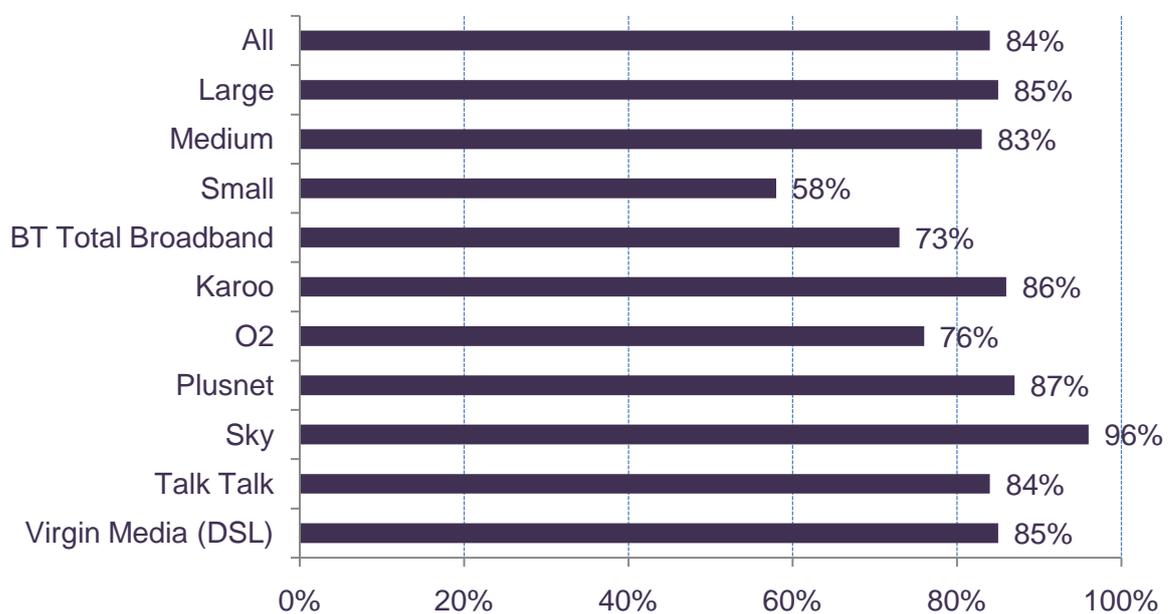

Source: The difference is calculated as the total absolute difference between the online and offline minimum speeds and maximum speeds.
Base: 624

Figure 7[21] then goes on to show that when compared with the average across all ISP's, Small ISPs were significantly less likely to provide speed ranges on the telephone and on the website which were within 1Mbits/s of each other; website and telephone speeds were within 1Mbit/s of each other on 58% of occasions.

When compared with the average across all ISPs, Sky were more likely than any other ISP to provide speeds that were within 1Mbit/s of each other – Sky during more than 9 in 10 mystery shopping calls (96%)).

BT Total Broadband (73%) and O2 (76%) were significantly less likely to provide online and telephone speed estimates within 1Mbit/s of each other. BT Total Broadband and O2 gave these estimates on 7 in 10 calls.

Figure 7: Percentage of enquiries made where online and telephone speed range estimates were given and within 1Mbit/s of each other


Source: The difference is calculated as the total absolute difference between the online and offline minimum speeds and maximum speeds. Only cases where a range was given online and in the sales call were included in this analysis.
Base: Large 395, Medium 204, Small 38.

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[21] Results from Figure 7 based on calculations provided by Ofcom derived from GfK survey data.

Figure 8[22] shows the percentage of estimates given in telephone calls where the estimated maximum speed given equals or exceeds the headline speed for that package. Although some services are restricted to 8 Mbit/s, the package headline speed used in marketing is used in this analysis, rather than 8Mbit/s. Just over 1 in 10 (14%) of estimated speeds provided by BT Total Broadband and Plusnet equals or exceeds the headline speed for that service.

Figure 8: percentage of maximum speeds given on the telephone that match advertised speeds.
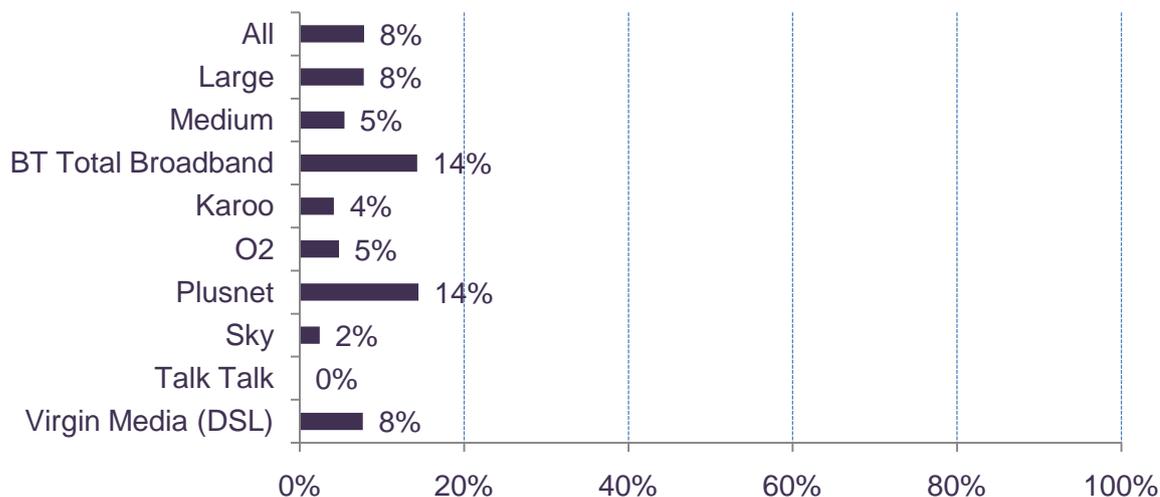
Source: Phone Maximum (rounded) matches advertised headline rate (data analysis) for those who were given a range of speeds
Base: Large 387, Medium 190.

Due to the fact that line speed for an ADSL line is driven mainly by the quality and length of the wiring between the local exchange and a customer's house, the speeds given to an individual shopper who contacted more than one supplier should be broadly consistent. Analysis was carried out to look at this. Approximately 419 of the mystery shoppers contacted 2 or more ADSL operators. This analysis was limited to cases where a mid-point, either on its own or with a range, had been provided for simplicity.

The following chart shows the comparisons between the operators. The differences between first operator in a row and the operators were worked out and then averaged. The median difference (50% above, 50% below) was also calculated. A positive average means the first named ISP provided a higher speed, a negative average indicates that the first named ISP provided a slower speed. For comparability between the speeds, both the average and mean should be zero. The number of cases where the speed was exactly the same is also given in percentage terms.

	Mean average	Median	%cases same	Base
BT Total/O2	1.0	0	21%	28
BT Total/Plusnet	-0.0	0	55%	42
BT Total/Talk Talk	0.1	0.1	6%	31
O2/Plusnet	-0.6	0	30%	33
Orange/Plusnet	-0.3	0	50%	26
Plusnet/Talk Talk	0.5	0.1	3%	35

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[22] Results from Figure 8 based on calculations provided by Ofcom derived from GfK survey data.

BT Total, Plusnet and Orange are all provided over BT Wholesale's network in the main. Therefore, high levels of comparability between these speed estimates provided over these networks could be expected. This is borne out by the results above – 55% of BT Total and Plusnet and 55% of Plusnet and Orange's speed estimates are the same. The difference in the median is 0 and the differences in the mean is 0 or very small (0.3 Mbps).

O2 also provided similar speeds to these companies. It provided the exact same speeds as BT Total and Plusnet in 21% and 30% of cases and the median difference is 0. The mean suggests O2 was more conservative than BT Total and less conservative than Plusnet when providing estimates. As the estimates provided by these two ISPs are so similar when compared directly, this is likely a consequences of the small number of cases analysed.

Talk Talk appears to add additional analysis within its speed checker, as the estimates providers tend not to be a straight replication of the BT Wholesale checker figure. –6% or less of the estimates provided by Talk Talk were exactly the same as the speeds given by BT Total and Plusnet. Talk Talk seems to offer more conservative speeds than both BT Total and Plusnet, especially towards the lower end. This may also be connected to whether the ISPs give more detailed speed figure or provide rounded figures e.g. to a certain decimal page(It is understood that BT Total Broadband and Plusnet round their estimates, while Talk Talk does not).

5. Other service information provided over the telephone

### 5.1 Actual speeds may be lower and reasons for this

The 2nd principle within the Code of Practice states that the ISP should explain to consumers that the range of access line speeds provided is only an estimate. ISPs must explain that the actual throughput speed that a consumer receives is likely to be lower than the headline (advertised) speed and, for DSL services, the estimated access line speed and explain that this can be influenced by a number of factors[23].

The mystery shopping exercise ascertained how much information they were told about what can impact the actual broadband speed achieved and why actual speeds achieved may be different from the estimate given.

Overall, 19% of mystery shoppers were clearly told that the actual speed they receive may be lower than the estimated speed provided on the call - see Figure 9. Large ISPs (21%) were significantly more likely to tell customers that the actual speed may be lower than the estimated speed than medium ISPs (15%). In 22% of the contacts with small ISPs, they provided this information.

Sky stands out against the other ISPs on this measure as Sky informed told the mystery shoppers that the actual speed they receive may be lower in just under half of all cases (48%). No other individual large or medium ISP informed the shopper of this in more than a fifth of calls.

Figure 9: Percentage of mystery shoppers who were told the actual speed may be lower than estimated or headline speeds
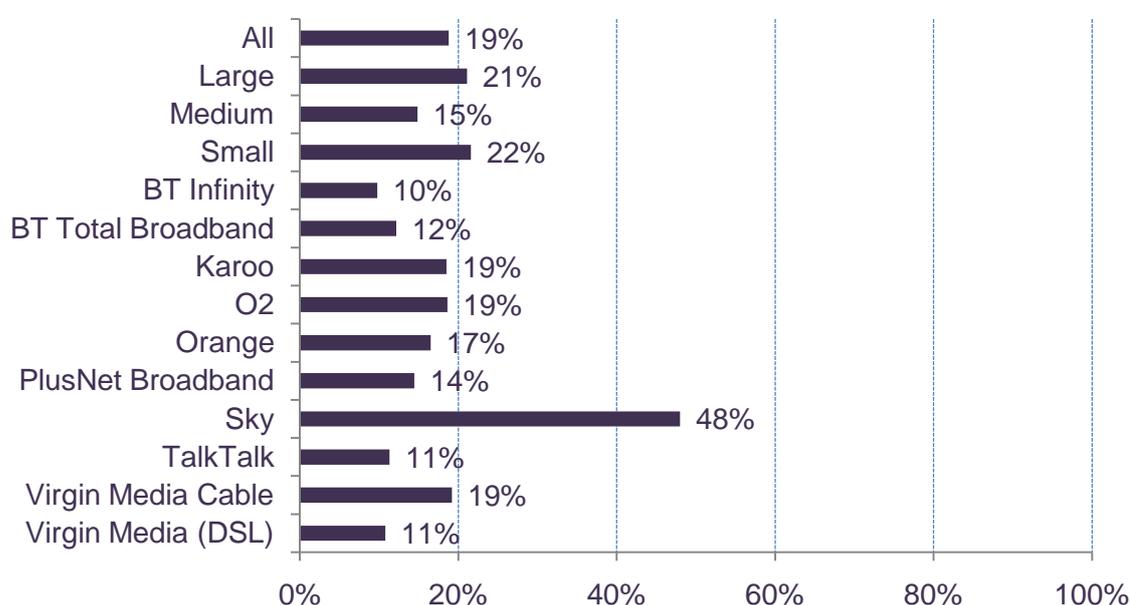
Source: Q3.17 Were you told that your actual speed would probably be lower than the estimated speed given?

[23] For customers signing up over the telephone, this information should be provided over the telephone by the ISPs and their Representatives, if it is not otherwise provided following completion of the sales process in written form such as in a confirmation email or letter. For customers signing up over the internet, it should be conveyed by at least the relevant website page.

Despite not being clearly told that actual speeds would be lower than the estimated speed, Figure 10 shows that overall 34% of mystery shoppers were told some information about what can affect their broadband speed, for example a customer's distance from the exchange or how busy the network is.

Medium ISPs were significantly less likely to state what could affect the mystery shopper's broadband speed at 26% compared to 38% of contacts with Small providers and 39% of those with large providers. Callers to Virgin Media DSL (21%) and BT Infinity (11%) in particular were least likely to be told some kind of information about what factors can impact the speed received; they were significantly less likely that at least 5 other ISPs to provide this information.

Sky again stands out from the other ISPs on this measure, as it provided this information during significantly more mystery shops than any other ISP (59% of the time).

Figure 10: Percentage of mystery shoppers who were told any information about what can affect the speed of their broadband
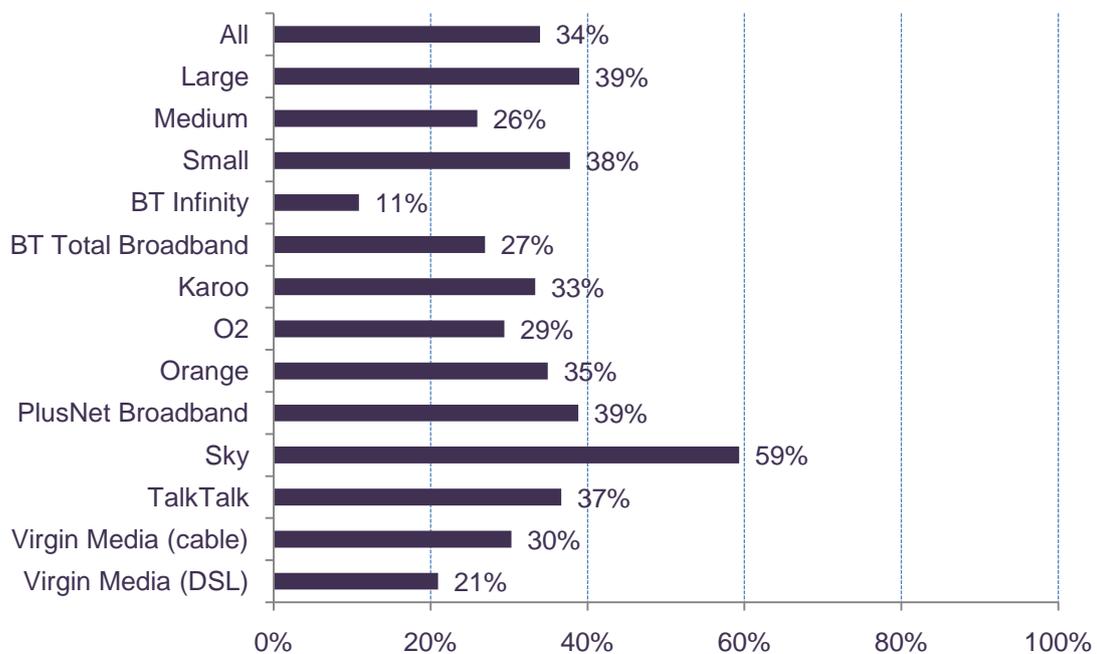
Source: Q3.18 Did they provide any information about what can affect the speed of your broadband connection?
Large 707, Medium 526, Small 123

Figure 11 shows that of those that provided information about what can affect the actual broadband speed, 61% were advised that speed would be affected by how busy the network was and 53% were advised that speed would be affected by how far the connection was from the telephone exchange. 32% of advisors stated that the time or day of access could affect the speed.

9% of mystery shoppers were told 'Something else' could impact on the speed they receive, including: the website they were trying to access, the age of their computer equipment and the hardware or software they had, the weather, and maintenance that might be taking place at the exchange or on the phone line.

Figure 11: Breakdown of what ISPs say can affect the broadband speed
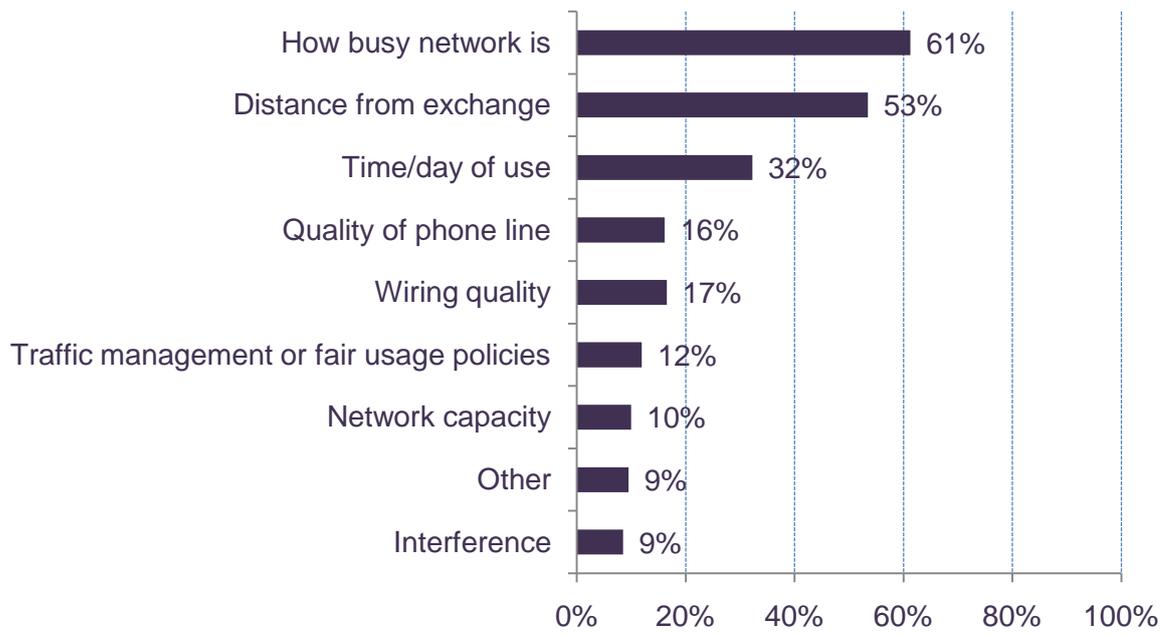
Source: Q3.19a to h Please select what was said when you were told your estimated speed may be lower?
Base Size: 448

5.2 Minimum guaranteed service

The 2nd principle of the Code of Practice states that if the consumer receives an access line speed which is significantly below the estimated speed they were given at point of sale, then the customer should contact the ISP[24].

The 2nd principle also says that 'ISPs must state with equal prominence to other written information provided that if the consumer receives an access line speed which is significantly below the estimated access line speed range then the customer will have the ability to leave their contract without penalty if the measures set out in the 4th principle are not able to resolve the problem[25].' The Code does not explicitly say that this information must be given over the phone to potential customers, however in order to comply with the spirit of the Code, it is expected that this information would be given to assessors if they specifically asked about receiving lower broadband Speeds.

The mystery shopping sample included a proportion of assessments where the mystery shopper was asked to prompt about what happens if the speed they receive is significantly lower than the estimated speed given by the provider. Results were collected as to whether the member of staff clarified the steps that would be taken to resolve the issue, as well as telling the mystery shopper that if ultimately they cannot get the speed estimated that they could leave the contract.

Figure 12 looks at those mystery shoppers who were designated to try to find out what the ISP would say if asked prompted about the minimum guaranteed service element of the Code (by asking for information on what to do if their speed was significantly slower than estimated). 14% of these mystery shoppers were told that they should contact the broadband provider first if the speeds they actually received were significantly lower than those they are told during the sales process *without needing to prompt for it*, and a further 40% were told this information when they specifically asked what to do if their speeds were lower than expected. 46% of mystery shoppers were still not given the information required when this question was asked, however they may have been told different or additional information relating to this situation.

17% of Large and 7% of Medium broadband providers mentioned this without prompting, although a further 41% of Large and 40% of Medium providers then discussed this when prompted.

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[24] The 4th principle of the code indicates that ISPs must be prepared to manage customers' problems when they report that they are not receiving the speeds that they had expected to receive when they purchased the broadband service.

[25] The Code does not explicitly say that this information must be given over the phone to potential customers, however in order to comply with the spirit of the Code, it is expected that this information would be given to assessors if they specifically asked about receiving lower broadband speeds.

Figure 12: percentage of mystery shoppers who were told to contact the ISP if speeds are significantly lower than expected (among those who prompted on this).

	Yes - unprompted	Yes - prompted	No
All	14%	40%	46%
Large	17%	41%	42%
Medium	7%	40%	52%
Small	17%	35%	48%

■ Yes - unprompted   ■ Yes - prompted   ■ No
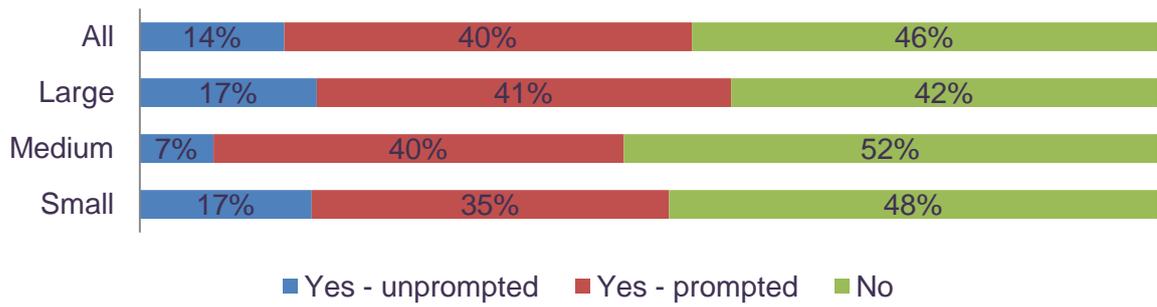
Source: Q4.3 Were you told that if, after purchase, your speed was significantly lower than the speed you are told that you should contact the ISP first?
Base Size: Large 179, Medium 100, Small 29* note very small base giving indicative findings only. (Base is for those who were designated to ask for information on the minimum guaranteed service- this was approx 30% of the calls)

5.2 Mention of the Code of Practice

The 8th Principle of the Code of Practice states that ISPs should make reference to the Code within the sales process, and provide a full copy of the Code through an easily accessible link on their website.

To measure compliance with this Principle, during the telephone calls, mystery shoppers were briefed to listen for any mentions of Ofcom, the Code of Practice or the broadband provider's own policies related to speeds. It should be noted that mystery shoppers recorded *overt* references to the above, as a mystery shopper would not necessarily have picked up if a sales advisor spoke of the *principles* of the code without mentioning the Code itself.

Figure 13: percentage of telephone calls where voluntary Code of Practice was mentioned

Category	Percentage
All	4%
Large	5%
Medium	3%
Small	2%
BT Infinity	1%
BT Total Broadband	1%
Karoo	1%
O2	8%
Orange	2%
PlusNet Broadband	5%
Sky	9%
TalkTalk	8%
Virgin Media (cable)	2%
Virgin Media (DSL)	1%
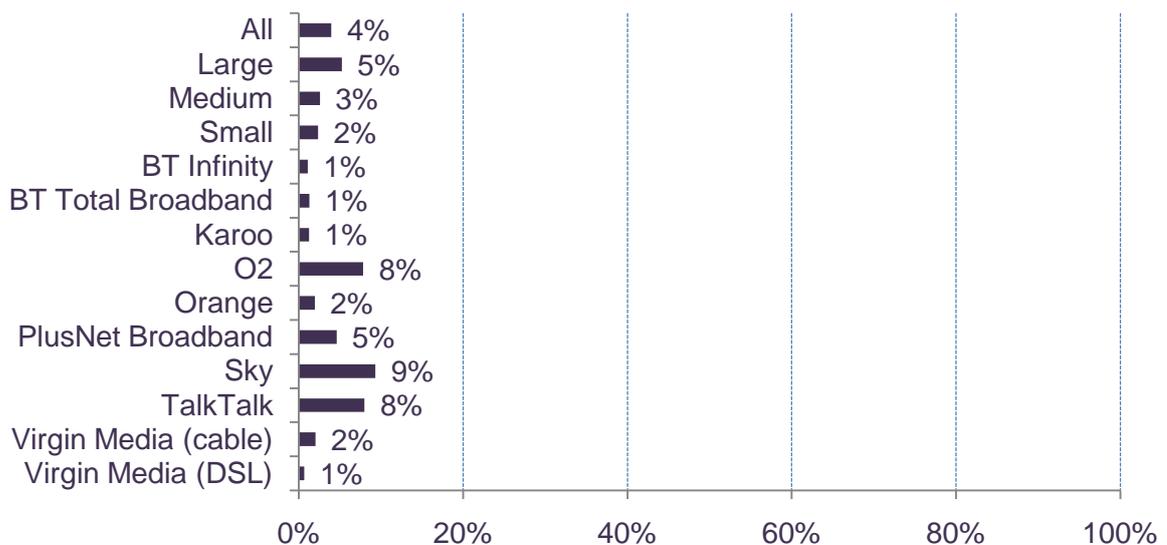
Source: Q4.2 Were you told about Ofcom or their Voluntary Code of Practice at any point? If Yes, what was said?
Base Size: Large 707, Medium 526, Small 123

Figure 13 above shows that 4% of mystery shoppers were explicitly told about the voluntary Code of Practice at some point during their call. Large broadband providers mentioned this on 5% of enquiries, Medium providers on 3% and Small providers on 2% of calls.

Of the individual large and medium ISPs measures, O2, Sky and TalkTalk were most likely to mention the voluntary Code of Practice (each was significantly more likely to mention this than at least 4 other ISPs); however, mentions were still under 10% for each.

Of the 4% where the Code of Practice was mentioned, the level of detail and information mentioned was varied, but often referred to the minimum service guarantee and that customers would be entitled to cancel the contract if speeds were consistently lower than they were told at point of sale:

Cancellation of contract mentioned

"I was told that if the speed performed at 0.3MBit/s or worse for a period of time and that there was nothing that xxx can do to improve it, I would be allowed to cancel the twelve month broadband contract without incurring a penalty." **(Large ISP)**

"If quoted speeds cannot be obtained, xxx are signed with Ofcom and I could therefore leave the contract." **(Large ISP)**

Voluntary Code of Practice mentioned

"After being prompted, the call agent explained what would happen if the line speed was not as expected after signing up. It was explained that the process was part of the Ofcom voluntary scheme." **(Small ISP)**

"I was told that xxx are part of the Voluntary Code of Practice and I could refer to their website to find out what this meant." **(Large ISP)**

"The call agent stated that they were governed by Ofcom and therefore couldn't offer speeds that could not be delivered." **(Medium ISP)**

"I was asked, 'Have you heard of Ofcom?' The call agent went on to explain that the company had been assessed as the most reliable provider for the last six years." **(Medium ISP)**

"I was told that xxx operated within Ofcom's voluntary Code of Practice which can be found on their website." **(Large ISP)**

Figure 14 shows that 5% of mystery shoppers understood that they were told about the ISP's **own** policy regarding broadband speeds at some point during the call. Among the individual ISPs, Sky's advisors (20%) were statistically more likely to mention policies on broadband speed as this was mentioned in a fifth of cases (20%).

Figure 14: percentage of mystery shoppers told about ISPs own policy on speeds

ISP	Percentage
All	5%
Large	7%
Medium	2%
Small	4%
BT Infinity	1%
BT Total Broadband	4%
Karoo	2%
O2	5%
Orange	1%
PlusNet Broadband	6%
Sky	20%
TalkTalk	3%
Virgin Media (cable)	1%
Virgin Media (DSL)	1%

Source: Q4.1 Were you told about the providers own Code of Practice or policy regarding broadband speeds at any point?
Base Size: Large 707, Medium 526, Small 123

Of those calls where shoppers thought they were told about the ISPs' own policies, there was a mixture of information provided – some related to ISPs' own speed monitoring processes and policies and some mentioned Ofcom and the voluntary Code of Practice. Often, mystery shoppers referred to the element within the voluntary Code of Practice relating to the minimum service guarantee and that customers would be entitled to cancel the contract if speeds were consistently lower than expected.

Good Practice

"If they do not provide satisfactory speed service, I have the right to cancel the contract with no monies owing." **(Large ISP)**

"I was told that a speed of at least 1 Mbps was guaranteed and that if the speed was below this in the first three months of the contract, I could opt out of the contract." **(Large ISP)**

"I was told that xxx was signed up to the Ofcom Code of Practice and that if I was only obtaining around 10% of the speed expected, (around 2Mb), I could leave my contract." **(Large ISP)**

Bad Practice

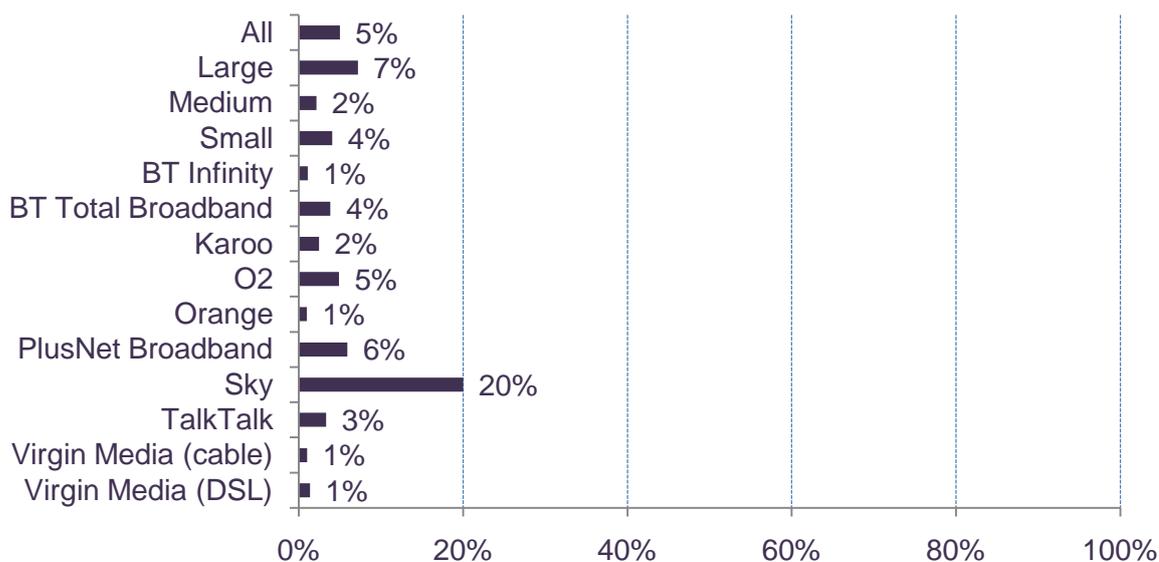*"It was explained that the ISP had a policy of not committing to a particular speed as this was out of their control."* **(Small ISP)**

"The call agent stated that they were governed by Ofcom and therefore couldn't offer speeds that could not be delivered." **(Medium ISP)**

5.4 Overall impressions of information given by the sales advisor

The 1st Principle of the Code states that 'ISPs must use best endeavours to procure that all of their representatives (including all of their officers and employees and any agents or sub-contractors) ("Representatives") involved in selling or promoting their broadband products and services or in the renewal or extension of agreements of existing customers are trained appropriately and that they have sufficient understanding of the products and services they are promoting and selling.'

To help to assess compliance with this Principle, the mystery shoppers completed a questionnaire about how they felt about the information they received and the manner in which it was communicated to them by the telephone service agent. Mystery shoppers rated these questions on a 5-point scale where 1 was the most negative on the scale and 5 was the most positive on the scale.

Figure 15: Clarity of information about actual speed being lower than the estimated maximum speed
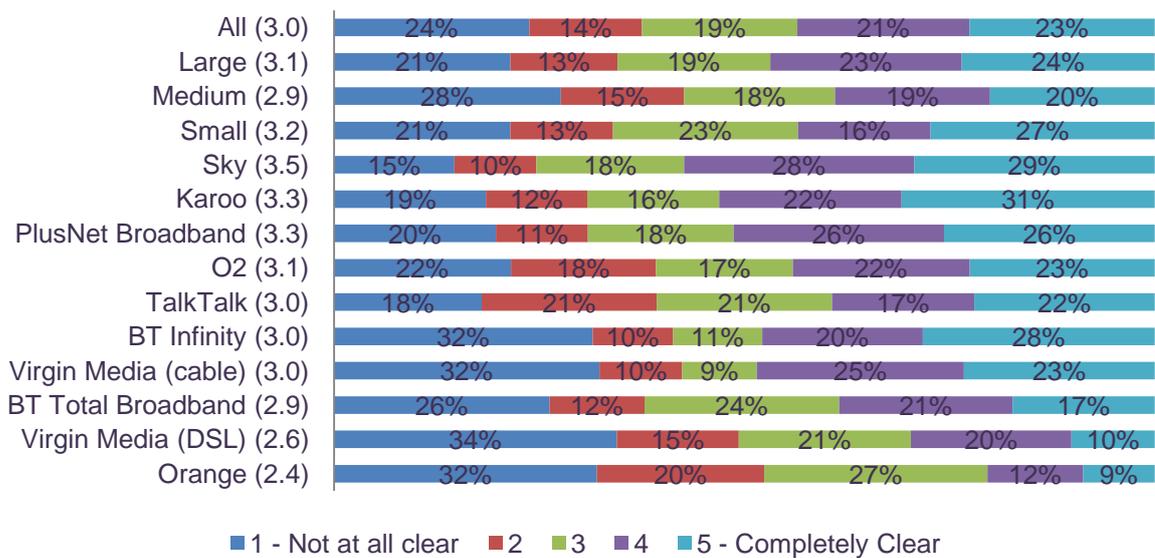
Source: Q5.1 On a scale of 1 to 5, where 1 is 'Not at all clear' and 5 is 'Completely Clear', how clear was it that the ACTUAL speed you were likely to get would be lower than the MAXIMUM speed you were told about?
Base Size: Large 608, Medium 331, Small 112

Figure 15 shows that overall 24% of mystery shoppers felt the information given to them about the difference between estimated maximum and actual speeds was imparted completely clearly (rating of 5). A further 14% rated this aspect of their call as 4 on the 5-point scale.

The average score has been added to the chart to give an indication of overall performance, Sky having the highest at 3.5 out of 5 and Orange having the lowest at 2.4 out of 5. 57% of mystery shoppers who contacted Sky rated them 4 or 5 on the 5-point scale.

Only 2 in 10 shoppers who contacted Orange rated them as 4 or 5 on the 5-point scale, the lowest of all ISPs. Additionally to this, more than a third of callers (32%) felt they were not clear at all when providing information about the actual speed versus estimated maximum speed.

Example verbatim comments from those mystery shoppers who rated the member of staff as 1 – Not at all clear

"I was given a speed but no information surrounding it. I was not told whether it was maximum or minimum or given any further information." **(Medium ISP)**

"The call agent did not state at any point that the actual speed received could be lower than the range they had quoted me." **(Large ISP)**

Example verbatim comments from those mystery shoppers who rated the member of staff as 2 or 3

"No real reference was made to the fact that the speeds would be slower other than the fact that they might be slower during peak periods." **(Medium ISP)**

"The possible difference between the actual speed and the maximum speed was not stressed but it was pointed out that speeds were only a guideline." **(Large ISP)**

"I was told that I lived in a good area and was given a good range of speeds, therefore I was led to think the actual versus maximum speed was irrelevant." **(Medium ISP)**

Example verbatim comments from those mystery shoppers who rated the member of staff as 4 or 5 – Completely clear

"I was clear that the actual speed would be lower than the maximum speed as the call agent informed me about this clearly by saying that the line speed was dependent on various factors." **(Small ISP)**

"I was told that it might be less than the average but will be more than the guaranteed minimum." **(Medium ISP)**

"I was told that I would get around 8Mbps and it may be up to 12Mbps. I was at no time told that I would get 12Mbps all the time." **(Small ISP)**

"The call agent explained that my average speed would be about 15Mb, which obviously wasn't as high as the 19Mb maximum." **(Small ISP)**

Figure 16: Knowledge of telephone agents about broadband speeds
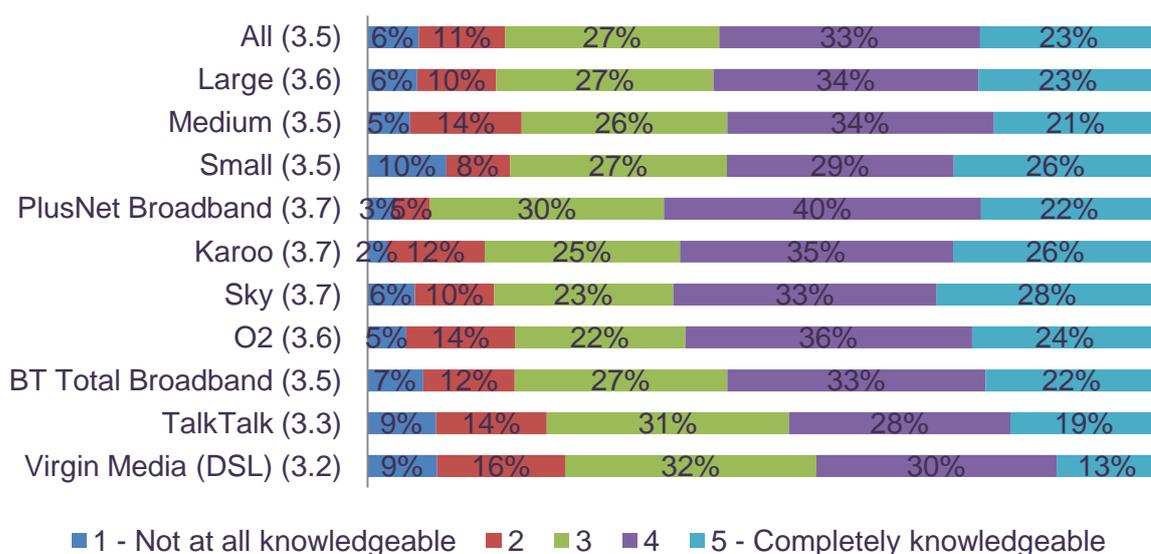
Source: Q5.2 On a scale of 1 to 5, where 1 is 'Not at all knowledgeable' and 5 is 'Completely knowledgeable', how knowledgeable do you feel the person you spoke to was about broadband speeds?
Base Size: Large 608, Medium 331, Small 112

Figure 16[26] shows how mystery shoppers rated telephone agents on their knowledge of broadband speeds – overall, 56% of mystery shoppers rated the staff as 5 (Completely knowledgeable) or 4 on the 5-point scale. A further 26% rated them on the mid-rating of 3.

The average score has been added to each chart to give an indication of overall performance, PlusNet, Karoo and Sky all having the highest at 3.7 out of 5 and Orange and Virgin Media DSL having the lowest at 3.2 out of 5.

Virgin Medium Cable has the highest proportion of mystery shoppers who felt their staff were complete knowledgeable (29%) and Virgin Media DSL the lowest (13%).

Example verbatim comments from those mystery shoppers who rated the member of staff as 1 – Not at all knowledgeable

"The call agent I spoke to showed no proficiency in speed, they only wanted to discuss inclusions and price." **(Large ISP)**

"The advisor was more interested in the sale." **(Medium ISP)**

"The information I received was sketchy and I only received information when prompted. In addition, the Call Agent referred to the speed of the service that she herself received, which was irrelevant. At the commencement of the call she also kept referring to my telephone package, when I wished to discuss home broadband, which was rather confusing for me." **(Large ISP)**

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[26] Orange, Virgin Cable, Zen Internet and BT Infinity have been removed from this analysis relating to speed information. This is because the provision of a range estimate is not relevant, yet mystery shoppers may have rated these ISPs unfairly negatively because no range was provided

"I felt the call agent had no idea about broadband speeds. Every reply given to me was for me to look on their website." **(Small ISP)**

Example verbatim comments from those mystery shoppers who rated the member of staff as 2 or 3 on the 5-point scale

"The call agent did not seem to be very knowledgeable as they could not answer my questions about the estimated line speed and the installation time etc. They also appeared to be putting pressure on me to look for information on their website rather than asking them. The line speed range given to me did not match what I found online for my postcode. So, I felt that they were not very knowledgeable." **(Small ISP)**

"He possibly knew what he was talking about but he was not good at getting the information across. He spoke far too fast and was too garbled. I did ask him to slow down quite a few times but to no avail." **(Large ISP)**

"The call agent did not mention speed throughout the conversation and then only gave me an estimated speed when prompted. They did not give me any further information regarding possible fluctuations in speed." **(Medium ISP)**

"The information was given confidently, although the technical issues relating to line speed were not offered." **(Medium ISP)**

Example verbatim comments from those mystery shoppers who rated the member of staff as 4 or 5 – Completely knowledgeable

"The call agent gave me confidence as they appeared knowledgeable and understood their products." **(Small ISP)**

"The call agent was confident with their responses and these matched the details I had already obtained off the website." **(Large ISP)**

"The call agent spoke clearly and competently about Broadband speeds. Information was given readily when I requested this." **(Large ISP)**

"The call agent gave specific information for my area in a knowledgeable manner." **(Medium ISP)**

"The call agent I spoke to knew their competitors' figures and used these as a comparison." **(Small ISP)**

"The call agent appeared very knowledgeable about speed limits and provided sufficient information in plain language to enable an informed decision to be made." **(Large ISP)**

Figure 17: On a scale of 1 to 5, how helpful the mystery shopper felt the member of staff was about broadband speeds

	1 - Not at all helpful	2	3	4	5 - Completely helpful
All (3.5)	7%	12%	25%	32%	24%
Large (3.6)	6%	13%	25%	32%	25%
Medium (3.6)	7%	11%	26%	33%	24%
Small (3.4)	10%	12%	28%	28%	22%
Karoo (3.8)	4%	7%	22%	35%	32%
Sky (3.7)	4%	12%	19%	35%	29%
PlusNet Broadband (3.7)	3%	8%	29%	36%	24%
O2 (3.7)	5%	9%	27%	32%	26%
BT Total Broadband (3.5)	6%	15%	22%	31%	25%
TalkTalk (3.3)	10%	16%	28%	26%	20%
Virgin Media (DSL) (3.2)	11%	16%	29%	31%	12%
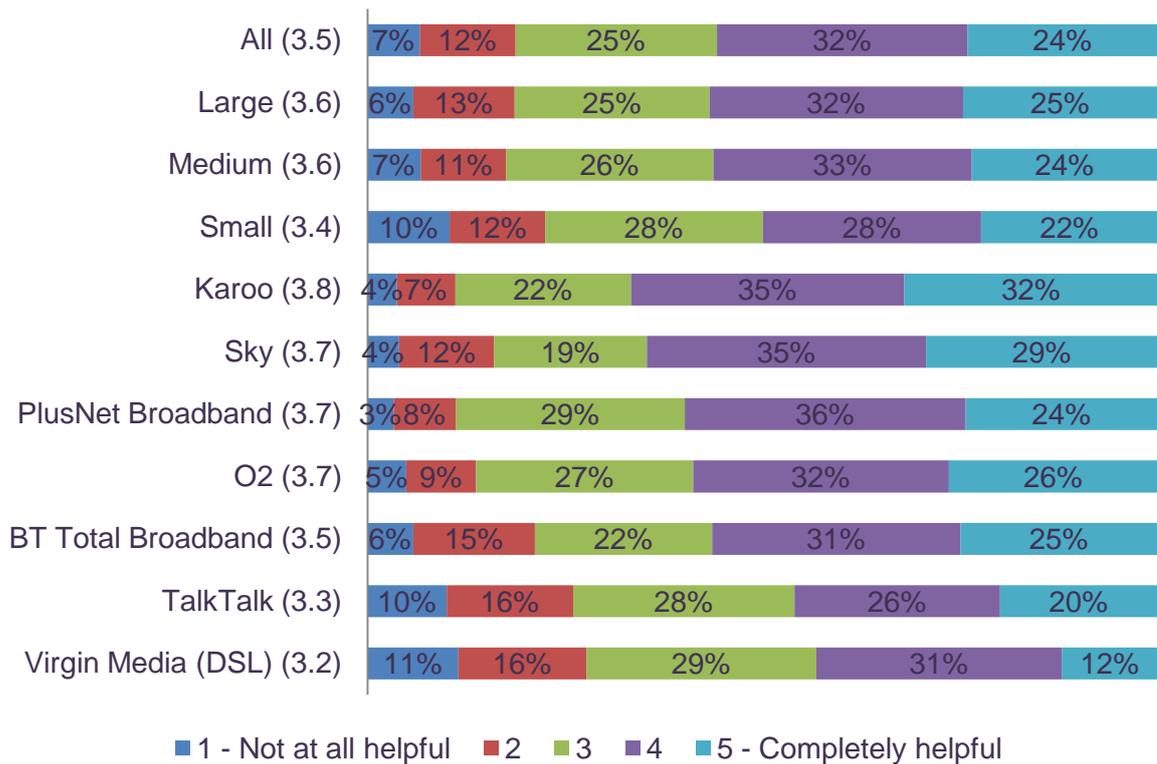
Source: Q5.3 On a scale of 1 to 5, where 1 is 'not at all helpful' and 5 is 'completely helpful, how helpful do you feel the person you spoke to was about broadband speeds?
Base Size: Large 608, Medium 331, Small 112.

Mystery shoppers were asked to rate the member of staff on a scale of 1 to 5 in terms of how helpful they were about broadband speed, 1 being not at all helpful and 5 being completely helpful. [27]They were asked to only rate this based on the perceived knowledge of speeds and not anything related to products or packages that they may have discussed. Again, the average score has been added to each chart to give an indication of overall performance, Karoo having the highest at 3.8 out of 5 and Virgin Media DSL the lowest at 3.2 out of 5.

Figure 17 shows that overall, 56% of mystery shoppers rated the member of staff at 4 or 5. Of those that contacted a Large ISP, 58% rated them at 4 or 5.

Of the Large and Medium broadband providers, Karoo and BT Infinity were rated the most helpful – 32% of mystery shoppers who contacted these ISP's rated their staff as completely helpful. Virgin Media DSL and TalkTalk staff had the highest number of mystery shoppers who rated them as not at all helpful – Virgin Media DSL 11% and TalkTalk 10%.

Example verbatim comments from those mystery shoppers who rated the member of staff as 1 – Not at all helpful

"The speed information was not particularly helpful, and the Call Agent seemed reluctant to discuss it in more detail." **(Medium ISP)**

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[27] Orange, Virgin Cable, Zen Internet and BT Infinity have been removed from this analysis relating to speed information. This is because the provision of a range estimate is not relevant, yet mystery shoppers may have rated these ISPs unfairly negatively because no range was provided

Example verbatim comments from those mystery shoppers who rated the member of staff as 2 or3 on the 5-point scale

"I did not feel that the Call Agent was particularly helpful. I came across as someone who did not know much about broadband or the speeds and I came away from the call with limited information." **(Large ISP)**

"I felt uncomfortable today because I felt the call agent did not really want to be taking my enquiry." **(Small ISP)**

"The call agent that I spoke to, whilst sounding cheerful and friendly over the telephone, did not volunteer much information." **(Small ISP)**

"The call agent actually was slightly patronising. When I queried the speed because I did not hear them the first time, they said, "That is the speed." **(Medium ISP)**

"The call agent could tell me what the speed would be up to but, not about whether the speed would be affected or what would happen if it was slower than expected." **(Medium ISP)**

"The call agent was helpful to some extent, but they did not elaborate on the estimated speeds after I asked about them." **(Large ISP)**

Example verbatim comments from those mystery shoppers who rated the member of staff as 4 or 5 – Completely helpful

"I was given so much information and so quickly that had I been in the market to switch today, I would have had to ask the person to slow down and repeat everything. He gave me so much information so quickly." **(Medium ISP)**

"The call agent was helpful. They explained things to me in full detail and dealt with my enquiry professionally." **(Large ISP)**

"The call agent was helpful and gave me as much information as they could." **(Small ISP)**

"The call agent was friendly and helpful and sent me an offer via an email as it gave extra discount when ordering online." **(Large ISP)**

"The call agent was able to provide all necessary information, price and speed, quickly and did so unprompted." **(Small ISP)**

"The call agent gave me more information than I needed and was very friendly." **(Medium ISP)**

5.5 Other findings provided over the telephone

In addition to specific questions around speed estimates, mystery shoppers were also asked to record further details if the advisor gave any other information about speeds during the telephone call. It should be remembered that mystery shoppers were contacting new business/customer telephone lines so these would probably be sales staff they were talking to and the themes that have come out of this question are not surprising.

A selection of comments can be found below however the general themes of these comments can be categorised as follows: upload speeds, additional information or products that may help to get

faster speeds, up-selling of additional product/package information, details about the initial service period and how speed may fluctuate and statements to close/encourage the sale such as mentioning the average UK broadband speed in comparison to that which the mystery shopper could receive.

Upload/average UK speeds

"I was informed of the 2.0Mb upload speed." **(Medium ISP)**

"The call agent told me that the upload speed was 10Mb." **(Medium ISP)**

"I was told that the national average download speed was 3.5MB." **(Large ISP)**

Additional information or products that may help to get faster speeds

"I was told that an accelerator (available to purchase from xxx) could boost the speed by up to 2.5 Mbps. I was also told that if I opted for the TV service from xxx, the installation charge for this would include an engineer visit to boost the line for the TV service and that this would result in increased broadband speed. It was mentioned that the TV installation charge would not be payable if the line could not be boosted" **(Large ISP)**

"I was advised they were investing in an i-plate, which would make the line faster." **(Small ISP)**

"I was informed that xxx had a service called xxx which I was told meant that xxx would constantly be providing me with the fastest possible speeds my line could handle, regardless of how busy the network was at that time and that during the first few weeks of being connected, they would try to make my broadband faster by trying faster speeds to see if my line could cope with these. No actual figures were quoted for this though." **(Medium ISP)**

Up-selling of additional product/package information

"For £18 I could get speeds of 20Mb" **(Large ISP)**

"The call agent started off by telling me that I could have xxx with speeds of 28.7Mbps upload and 10Mbps download, however I explained that I was not interested in the xxx option." **(Large ISP)**

"The call agent advised me that I would have access to 30 meg with xxx from next month." **(Large ISP)**

"The call agent said they could guarantee a top speed for £5 extra a month." **(Large ISP)**

Details about the initial service period and how speed may fluctuate

"I was told the speed could be at the lower end of the range during peak times and if the Internet provider was overly subscribed." **(Small ISP)**

"I was told that the off peak ranges for speed would be 4.5 to 5.4 Mbit/s, whilst peak time speeds would be in the range 1.5 to 4.5 Mbps." **(Small ISP)**

"I was told my area was very slow, the operator was being honest and said I would not get any better than that." **(Medium ISP)**

"I was told that there would be a 1.0Mbps variation either side of the quoted amount." **(Large ISP)**

"I was told that the xxx service would be over the same lines. Unlike xxx, xxx does not have traffic management policies and so I was likely to have the same speed, irrespective of the time of day." **(Large ISP)**

Statements to close/encourage the sale

"I was told that the national average was 5.0 MBPS and that the estimated speed was a very good speed." **(Large ISP)**

"The member of staff told me that the UK average speed was 3MB. They also recommended that I choose fibre optic instead as I would receive faster speeds for the same price. The e-mail they sent me following the call was about the faster package and not the one I enquired about." **(Large ISP)**

"The call agent told me, as xxx follows Ofcom regulations, they provide an estimate of the broadband speed. Some companies advertise the maximum of 20MB, but do not provide a realistic estimated speed." **(Medium ISP)**

"I was advised that a speed of 2Mb was sufficient, the call agent said people saw faster speeds advertised but they were not necessary. The call agent had 2.5Mb at home and they said this was more than sufficient. They said that the speed depended on the phone line." **(Medium ISP)**

6. Web Audit Findings

6.1 Overview

The 2nd principle of the Code states that ISPs should 'provide a facility (line checker) on their website so that consumers can find out, in a clear and easily accessible manner, what their estimated access line speed is. ISPs must ensure that access line speed information is given due prominence on the line checker speed results webpage (i.e. the page on which a consumer's access line speed estimate is generated following the input of a consumer's postcode and/or landline number).'

This principle also states that ISPs must explain that the actual throughput speed that a consumer receives is likely to be lower than the headline speed and explain that this can be influenced by a number of factors. The Code also indicates that when relevant, ISPs must provide all consumers with information that actual throughput speeds during peak hours may be lower than at other times of the day. This information should be conveyed by through the relevant website page.

The 5th principle says that ISPs should explain, in a prominent place on their websites, how customers can check the access line speed and actual throughput speed they are receiving in practice. They should also provide information on their websites which clearly explains to customers what steps they can take to ensure that they receive the highest possible access line speeds and actual throughput speeds.

The 5th Principle of the Code also states that ISPs should aim to ensure that information related to fair usage policies, usage limits, traffic management and traffic shaping are clear and easily accessible to consumers on their websites.

The 8th Principle states that ISPs should provide a full copy of the Code through an easily accessible link on their respective website.

The audit of the ISPs websites therefore looks at the following areas:
- Whether there was online speed checking facilities available
- The availability of wider information about broadband speeds
- Availability of information regarding Fair Usage Policies
- Availability of information regarding Traffic Management policies

6.2 Evaluation of broadband information provided on ISP websites

An audit was carried out on 19 ISPs to evaluate the level of information available on their website and ease with which it is found. The audit was carried out by GfK executives to ensure consistency across the audit – images were collected for the aspects of the audit that were found on the websites to provide one audit report for each ISP.

The website audit covered an assessment of the broadband speed checker facility, speeds given, what can affect speed and details of Fair Use Policies. The websites assessed were BT, Demon, Eclipse, Fast.co.uk, Firenet, Green ISP, intouch systems, IDnet, Karoo, Orange, O2, Plusnet, Talk Talk, MacAce, Rutland Telecom, Sky, Virgin Media, Vivaciti, Zen.

GfK also audited what information was available about Traffic Management Policies on the websites of providers that also are signatories for the Broadband Stakeholder Group's (BSG) code of practice, i.e. Sky, BT, Virgin Media, PlusNet, O2, TalkTalk and Orange. Further to this, websites for mobile operators Three, Vodafone and T-Mobile were also included in the Traffic Management portion of

the audits (in recognition that fixed and mobile operators have signed up to a Voluntary industry code of practice on traffic management transparency for broadband services. Summary results for the *Traffic Management* portion of the websites can be found in Annex 3 Traffic Management Web Audit.

Audits for the *individual* ISPs can be found in Annex 4.

17 out of the 19 ISPs researched provided a speed checker on their website. Vivaciti and Rutland Telecom directed users to speed test websites that provided speed information currently available on their line – but actual speed estimates were not available for these providers. For the purposes of this audit, these two have been excluded from the remaining audit areas as all other results are based on speed checkers available on the ISP website.

On testing the speed checker, a range of speeds was given on 12 out of 17 ISP websites and an estimated mid-point (ADSL) speed was provided on 14 out of 17 websites[28]. 12 out of 17 ISPs provided guidance that the speeds given were estimates and may not be the exact delivered speed.

14 out of 17 websites gave information about what can affect the broadband speed within the speed checker. The reasons given that could affect the speed were as follows:
- 12 stated the distance from the telephone exchange
- 11 mentioned the quality of the phone line
- 5 mentioned the interference from other electrical devices
- 5 mentioned network business
- 4 mentioned the time of day/day of week

2 mentioned that traffic management policies might be a reason for broadband speed to be affected.

The GfK auditors were also asked to rate how easy it was to find the information they wanted about estimated access line speeds on a scale of 1 (not at all easy) to 5 (very easy) – 7 out of 17 websites were rated as very easy (rating of 5); 1 was rated as not at all easy (rating of 1).

Figure 19 shows the overall results for key aspects of the audit[29].

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[28] A MAC code is required to get a speed estimate on the Green ISP website. Within this audit therefore no speed estimates were received for this ISP
[29] Note the base size for each question is shown which is dependent on the routing within the questionnaire and availability of each audit aspect.

Figure 19: Results of key elements from website audits

Was there a broadband speed checker facility?	17 out of 19
Range of estimated speed provided?	12 out of 17
Estimated mid-point ADSL line speed provided?	14 out of 17
Clear speeds given in checker were estimates?	12 out of 17
Information about what can affect speed of connection? [1]	14 out of 17
Information about a Fair Usage Policy?	16 out of 19
Information about breaches of Fair Use Policy?	16 out of 17
Additional information explaining line speeds?	5 out of 19
Explanation of how internet speed affects user experience?	4 out of 19

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[1] within the broadband speed checking facility

Annexes

Annex 1 – Sample & Analysis Notes

Sample

The following ISPs were included in the online speed checker and telephone mystery shopping testing:

BT Total Broadband (ADSL)	Fast.co.uk
Sky (ADSL)	Firenet Internet
Talk Talk (DSL)	GreenISP
Virgin Media (Cable)	IDNet
BT Infinity (VDSL)	InTouch System
Orange Home (ADSL)	MacAce.net
Virgin Media (DSL)	Netplan Internet Solutions Ltd
Karoo (ADSL)	Rutland Telecom
Eclipse Internet	Solutios
O2 Home Broadband/Be Unlimited (ADSL)	Stream Networks Ltd
CI-Net	Vivaciti
Demon	Zen Internet
	Plusnet (ADSL)

Following piloting and the initial phase of fieldwork it became clear that CI-Net, Netplan, Solutios and Stream Networks Ltd were providing business, not consumer services and so were removed from this sample.

The final base sizes for each ISP can be seen below as well as the category of 'ISP Size' that was assigned to them

ISP	Base Size	ISP Size Attribute
BT Total Broadband (ADSL)	156	Large
PlusNet Broadband (ADSL)	153	Large
Sky (ADSL)	152	Large
TalkTalk (ADSL)	151	Large
Virgin Media (DSL)	149	Medium
Orange	103	Medium
O2	102	Medium
Virgin Media (cable)	100	Large
BT Infinity	94	Medium
Karoo	82	Medium
Eclipse Internet	13	Small
Vivaciti	12	Small
IDNet	12	Small
Zen Internet	12	Small
Fast.co.uk	12	Small
Demon	12	Small
Firenet Internet	12	Small
MacAce.net	12	Small
InTouch System	11	Small
GreenISP	11	Small
Rutland Telecom	8	Small
TOTAL	**1369**	

To maintain consistency for analysis, the reported data has been weighted so that all Large ISPs are reported on a base of 150 per ISP, Medium ISPs are reported on a base of 100 per ISP and Small ISPs are reported on a base of 10 per ISP. In the report the Small ISPs were reported together so a more significant base size was analysed. More details on the weighting can be found below under the Data Analysis heading.

Notes from fieldwork:
- none of the mystery shoppers were a current customer of the ISP they were contacting
- due to the geographic restriction of Karoo and the availability of alternative ISPs within the Hull area it became clear that the number of mystery shoppers on the GfK panel that were not already an existing customer of Karoo's were very few. Therefore the majority of these assessments have been completed by mystery shoppers who live outside of the Hull area but have used addresses and phone numbers of GfK mystery shoppers who do live in the area Karoo supply. To comply with MRS rules, these assessors agreed for their details to be used solely for this purpose during the study.

Data Analysis

The weight is calculated by dividing the expected sample size by the number of assessments that were completed for each ISP. Most percentages shown in the charts are using the weighted count which is the sum of the weight for a given response divided by the sum of the weight for all responses included. With the exception of Rutland and Virgin Media DSL this has a fairly small impact on the percentages. Virgin Media DSL data is therefore weighted down quite heavily and Rutland data is weighted up.

ISP Weights Table:

ISP	Assessments	ISP Size	ISP Size Weight	Weight
BT Total Broadband (ADSL)	156	Large	150	0.961538462
PlusNet Broadband (ADSL)	153	Large	150	0.980392157
Sky (ADSL)	152	Large	150	0.986842105
TalkTalk (ADSL)	151	Large	150	0.993377483
Virgin Media (DSL)	149	Medium	100	0.67114094
Orange	103	Medium	100	0.970873786
O2	102	Medium	100	0.980392157
Virgin Media (cable)	100	Large	150	1
BT Infinity	94	Medium	100	1.063829787
Karoo	82	Medium	100	1.219512195
Eclipse Internet	13	Small	12	0.923076923
MacAce.net	12	Small	12	1
Vivaciti	12	Small	12	1
Firenet Internet	12	Small	12	1
Zen Internet	12	Small	12	1
IDNet	12	Small	12	1
Demon	12	Small	12	1
Fast.co.uk	12	Small	12	1
GreenISP	11	Small	12	1.090909091
InTouch System	11	Small	12	1.090909091
Rutland Telecom	8	Small	12	1.5
TOTAL	**1369**			

The following table shows the "Advertised Headline Speeds" for each ISP. These were used when comparing the maximum speed stated on the phone against the "Advertised Headline Speed".

Advertised Headline Speeds:

ISP	Headline Speed
BT Infinity	40
BT Infinity	15
BT Total Broadband (ADSL)	24
BT Total Broadband (ADSL)	20
Demon	24
Demon	20
Eclipse Internet	24
Eclipse Internet	20
Fast.co.uk	24
Fast.co.uk	20
Firenet Internet	24
Firenet Internet	20
GreenISP	24
GreenISP	20
IDNet	24
IDNet	20
InTouch System	24
InTouch System	20
Karoo	24
Karoo	20
MacAce.net	24
MacAce.net	20
O2	24
O2	20
Orange	24
Orange	20
PlusNet Broadband (ADSL)	24
PlusNet Broadband (ADSL)	20
Rutland Telecom	24
Rutland Telecom	20
Sky (ADSL)	24
Sky (ADSL)	20
TalkTalk (ADSL)	24
TalkTalk (ADSL)	20
Virgin Media (DSL)	24
Virgin Media (DSL)	20
Virgin Media (cable)	24
Virgin Media (cable)	20
Vivaciti	24
Vivaciti	20
Zen Internet	24
Zen Internet	20

Reporting:
Within charts the summary groups of large, medium and small ISPs are reported, alongside individual ISPs where the base size is 100 or more. If a base size is lower than this, this is highlighted.

There is commentary on the differences between the different sized ISPs; this refers to the ISPs as a group based on the size, rather than each individual ISP within the size band. Comments on individual ISPs are made separately.

Comparisons with previous research:
Where possible, comparisons have been made with Ofcom's previous research carried out in 2009[30]. Comparisons are only made for the results of individual ISPs, rather than at the 'all ISP' level because the overall sample structure differs in the current research. Not all individual ISPS were measured in both phases; therefore comparisons over time can only be made for BT Total Broadband, Orange, O2, Plusnet, Sky, Talk Talk, and Virgin Media DSL (not cable).

Significance Testing:
The report draws attention only to differences between ISPs which are statistically significant. The majority of the significance testing used a standard Z test between sub samples. The confidence levels were at least 95%. For the comparisons against the 2009 data we used a confidence level of 99%.

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[30] http://stakeholders.ofcom.org.uk/binaries/telecoms/cop/Synovate_report.pdf

Annex 2 – Questionnaire and Briefing Notes

Online speed checker & Telephone Questionnaire

2.1	Date of website assessment (dd/mm/yyyy)	--/--/----	
2.2	Time started website assessment	:	
2.3	Time finished website assessment	:	
2.4	What information did you have to enter into the postcode checker to get the broadband speed information?		
	a. Name	Yes	No
	b. Address	Yes	No
	c. Postcode	Yes	No
	d. Telephone Number	Yes	No
	e. Email address	Yes	No
	f. Something else?	Yes	No
2.5	**KEY QUESTION:** Were you given an estimated *line* speed (or mid-point estimate)? *Ensure you note the correct speed for your assessment type e.g. Standard speed for all assessments except BT Infinity & Virgin (CABLE).*	Yes - please record EXACTLY how the speed was communicated as a verbatim comment✎	No **(Go to 2.7)**
2.6	*Please give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	✎	
2.7	Were you given a range of speeds?	Yes	No **(Go to 2.12)**
2.8	What was the upper limit stated on the range? *Ensure you note the correct speed for your assessment type e.g. Standard speed for all assessments except BT Infinity & Virgin (CABLE).*	✎please record EXACTLY how the speed was communicated as a verbatim comment	
2.9	*Please give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	✎	
2.10	What was the lower limit stated on the range? *Ensure you note the correct speed for your assessment type e.g. Standard speed for all assessments except BT Infinity & Virgin (CABLE).*	✎ please record EXACTLY how the speed was communicated as a verbatim comment	
2.11	*Please give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	✎	
2.12	Were any other speeds given on the results page of your postcode check?	Yes ✎	No
2.13	Please upload the screenshot of your completed broadband speed check		

	Section 3 – ISP Telephone Assessment						
3.1	Date of telephone assessment (dd/mm/yyyy)	--/--/----					
3.2	Day of week telephone call was made						
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
3.3	Time started telephone assessment	:					
3.4	Time ended telephone assessment	:					
3.5	Please categorise how long the call took in total from when you were able to speak to a member of staff i.e. not including IVR options or waiting to speak to someone.	0 – 5 mins					
		5.01-10 mins					
		10.01-15 mins					
		More than 15 mins					
3.6	Categorise time of day the call was made:	Before 09:00	09:01-12:00 (noon)	12:01 to 14:00	14:01 – 18:00	18:01 – 22:00	After 22:00

3.7	Please select ALL the information you were asked for after you stated you wanted to switch your broadband provider		
	a. Your name	Yes	No
	b. Full address including postcode	Yes	No
	c. Address but NO postcode	Yes	No
	d. Postcode ONLY	Yes	No
	e. Name of your current internet provider	Yes	No
	f. Details of your current internet service/package e.g. download limits	Yes	No
	g. Speed of internet connection you currently get	Yes	No
	h. Current price you pay/spend with provider	Yes	No
	i. What you use the internet for e.g. gaming, TV	Yes	No
	j. MAC code for your current internet provider	Yes	No
	k. Broadband package you are interested in switching to	Yes	No
	l. Price you would be willing to pay	Yes	No
	m. Price you have seen advertised	Yes	No
	n. Something else?	Yes ✎	No
3.8	Were you able to get any of the broadband speed estimates during the call? If No, please explain fully why.	Yes	No ✎ **(Go to 3.16**)

3.9	**PROMPT (only if the advisor is at the point of taking credit card details, getting a MAC code or ending the call):** Were you given an estimated *line* speed (or mid-point estimate)? *Ensure you note the correct speed for your assessment type e.g. Standard speed for all assessments except BT Infinity & Virgin (CABLE).*	Yes – unprompted please record EXACTLY how the speed was communicated as a verbatim comment✎	Yes – prompted please record EXACTLY how the speed was communicated as a verbatim comment✎ ✎	No **(Go to 3.11)**
3.10	*Please give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	✎		
3.11	Were you given a range of speeds?	Yes – unprompted ✎	Yes – prompted	No **(Go to 3.16)**
3.12	What was the upper limit stated on the range? *Ensure you note the correct speed for your assessment type e.g. Standard speed for all assessments except BT Infinity & Virgin (CABLE).*	✎ please record EXACTLY how the speed was communicated as a verbatim comment		
3.13	*Please give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	✎		
3.14	What was the lower limit stated on the range? *Ensure you note the correct speed for your assessment type e.g. Standard speed for all assessments except BT Infinity & Virgin (CABLE).*	✎ please record EXACTLY how the speed was communicated as a verbatim comment		
3.15	*Please give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	✎		
3.16	Were you given any other speed information during the call that is not recorded elsewhere? *If Yes, please describe what information this was and give the speed stated in decimals e.g. if 5.6MB write 5.6, if 512 kilobits per second write 0.512*	Yes ✎		No
3.17	Were you told that your actual speed would probably be lower than the estimated speed given?	Yes		No
3.18	Did they provide any information about what can affect the speed of your broadband connection?	Yes ✎		No **(Go to 3.22)**
3.19	Please select what they said and explain the detail:			
	a. Distance from telephone exchange	Yes ✎		No
	b. The wiring quality e.g. fibre optic/copper wire explanation	Yes ✎		No
	c. How busy the network is/the number of people online at any one time	Yes ✎		No
	d. The network capacity of the broadband provider	Yes ✎		No
	e. The time of day/day of week	Yes ✎		No
	f. Quality of the phone line	Yes ✎		No
	g. Their traffic management or fair usage policies	Yes ✎		No
	h. Interference from electrics/devices at home – e.g. the layout of house, number of devices using electricity, number of devices using wireless connections	Yes ✎		No
	i. Other (please specify)	Yes ✎		No

3.20	Were you told which days of the week are more likely to be congested?			
	No	Yes – weekdays only	Yes – weekends only	Other ✎

3.21	Were you told any specific times of day the network was most likely to be congested?				
	Not told	Mornings	Lunchtimes	Evenings	Other ✎

3.22	Were you advised (separately from being given a speed estimate), that you live in an area where the highest speed (ADSL) service is not available? E.g. that the "up to 20MB" service is not available in your area, only the "up to 8MB" service.	Yes – please record exactly what you were told✎	No

	Section 4 – Code of Practice		
4.1	Were you told about the providers own Code of Practice or policy regarding broadband speeds at any point? If Yes, what was said?	Yes ✎	No
4.2	Were you told about Ofcom or their Voluntary Code of Practice at any point? If Yes, what was said?	Yes ✎	No

4.3	**PROMPT (Only if the call is about to come to an end *AND* you have already asked or been told about estimated speeds *AND* you have been instructed to do so on your coversheet):** Were you told that if, after purchase, your speed was significantly lower than the speed you are told that you should contact the ISP first?	Yes - prompted ✎	Yes - unprompted ✎	No

4.4	Were you told that if this continued to be the case, that ultimately you can leave the contract?	Yes ✎	No

	Section 5 – Overall Impressions				
5.1	On a scale of 1 to 5, where 1 is 'Not at all clear' and 5 is 'Completely Clear', how clear was it that the ACTUAL speed you were likely to get would be lower than the MAXIMUM speed you were told about?				
	1 – Not at all clear ✎	2 ✎	3 ✎	4 ✎	5 – Completely Clear ✎
5.2	On a scale of 1 to 5, where 1 is 'Not at all knowledgeable' and 5 is 'Completely knowledgeable', how knowledgeable do you feel				

	the person you spoke to was about broadband speeds? Do not base your answer on the product knowledge – only the speed information they provided.				
	1 – Not at all knowledgeable 🖉	2 🖉	3 🖉	4 🖉	5 – Completely knowledgeable 🖉
5.3	On a scale of 1 to 5, where 1 is 'Not at all Helpful' and 5 is 'Completely Helpful, how helpful do you feel the person you spoke to was about broadband speeds? Do not base your answer on the product knowledge – only the speed information they provided.				
	1 – Not at all helpful 🖉	2 🖉	3 🖉	4 🖉	5 – Completely helpful 🖉
6.4	Is there anything else you were told about broadband speeds that has not been covered in the above?			Yes 🖉	No

Online speed checker & Telephone Briefing Notes

You must complete the full assessment process for your assessment i.e. all stages of the enquiry. The full assessment is:

Website check	→	Telephone assessment

GENERAL GUIDANCE

- **Please read the Glossary section** below to ensure you understand the terminology that may be used during your assessment both within these briefing notes, during data entry and by the ISP staff.
- You must complete all parts of the assessment on the same day – if you are unable to complete the telephone part on the same day due to the level of business the ISP is dealing with, please email GfK to let us know so it does not get deallocated.
- You must complete the website check before you complete the telephone stage.
- If you get asked a question you do not know the answer to, plead ignorance and try to progress the call anyway.
- Please ensure you check which ISP you are completing an assessment with and make sure you assess the correct one! BT Infinity and BT Total Broadband are different providers, as are Virgin Media (CABLE) and Virgin (DSL). If you are not sure what to assess please contact GfK as soon as possible for guidance – *please do not guess!*
- Unless you have a BT Infinity or Virgin Media (CABLE) assessment you are only assessing speeds for standard ADSL broadband connections (rather than the higher speed fibre/cable packages which are more expensive packages).

IMPORTANT – VIRGIN MEDIA (CABLE) AND BT INFINITY ASSESSMENTS ONLY

If you have picked up a Virgin Media (CABLE) or BT Infinity assessment you MUST be able to receive these services in order to complete this. Before starting your assessment please go to http://www.cable.co.uk/compare/packages/ and enter your postcode to check. If the website confirms you cannot receive these services then you MUST deallocate your assessment.

** PART ONE – WEBSITE CHECK **

The first part of this assessment is to visit the website of the ISP that is specified on your coversheet and use their broadband speed check facility to see what you are told about available speed for your address. Do not use a price comparison site for this phase – you must use the ISP website

- Using a search engine, you must find the website address for the ISP you are assessing. GfK are not providing this to you – if you have any problems with this please email cybershopqueries@gfk.com. Assessments entered stating you could not complete this stage because you could not find the website will not be accepted.
- When you reach the website, you need to look for the broadband speed checker. This may not be the name of it for each ISP, however it will be called something like this. You may need to click through to the broadband pages to find the checker facility. It will probably look something like this :

Broadband Availability

Enter your telephone line number here to find out what download speeds you can expect to get:

⊙ Check

●

YOU MUST FIND THE BROADBAND SPEED CHECKER – PLEASE CONTACT THE GfK HELPDESK IF YOU CANNOT FIND IT.

YOU MAY HAVE TO SELECT A PACKAGE AND VIEW THE PACKAGE DETAILS BEFORE BEING ABLE TO CHECK SPEED AVAILABILTY. This is especially relevant for O2 Broadband and Orange broadband assessments.

- Enter the details required to check your line speed for this ISP. Please enter as much detail as you are able to i.e. if you are asked for your phone number and/or postcode please enter both.
- What is shown will vary by ISP however there should be at least information about the speed available and possibly the packages available to you at that line.
- You need to note down all the speed information that is given to you (more details within the Questionnaire Completion section of this briefing).
- IMPORTANT: You need to take a screen shot of this page and save it on your PC as you will need to upload this to Cybershop during data entry. To do this follow the below instructions to ensure you get a good enough quality of image – this is vital. Website links, photos of your PC screen or web pages that have been highlighted then copied and pasted to a word document will not be accepted as the image quality will be too low for our purposes.

Taking a Screen Shot for uploading to Cybershop:

1. Ensure you have at least the speed details visible on the screen – you may need to scroll up/down to do this. The speed information is more important than any product information.
2. On your keyboard, press the Print Screen key – this will usually be on the top right hand side of your keyboard.
3. Open the program called Paint. If you are unsure about where this is on your computer, click on Start > Run > type 'mspaint' into the search function and this will open the required program.
4. When it is open, click Edit > Paste from the toolbar and the image of your screen will appear
5. Click on File > Save As and save your image on your PC. This image can then be uploaded during your data entry.
6. The image must be in JPEG format. Please made sure you select .JPG from the dropdown menu 'Save as Type'.

- The images provided will not be sent to the client for their use.
- They may, however, be used as part of our reporting presentation to illustrate how the speed checker works for consumers. All examples used will be anonymised and personal details removed so any personal information visible will not be passed on to anyone else.
-
-

? What if the results of the speed check show you are not able to receive the ISP's service?
If the results show you cannot get their service, please email GfK to let us know and we will deallocate and replace with another ISP if we can. This may occur for Virgin Media or BT Infinity assessments in particular but some other smaller ones which may be location dependent. You can look up the availability of ISPs in your postcode area before accepting an assessment at www.samknows.com/broadband/broadband_checker

●

**** PART TWO – TELEPHONE ASSESSMENT ****

The second part of this assessment is to telephone the ISP and gather information about the broadband speed you would achieve at your home.

Ring ISP → Enquire about broadband → Record speed information → Ask Prompt 1 if not told during call → Ask Prompt 2 if specified on your coversheet → End Call

You must use your own details and MUST have a landline phone number to provide if asked.

- Ensure you call during any specified timeframes.
- Please phone the most appropriate number for the ISP – remember that you are posing as a potential new customer so should not phone a number which appears to be for customers only.
- If faced with an IVR option, please select the most appropriate one. For some ISP's you may have to select the most appropriate product rather than the customer type e.g. select Broadband products if no 'New Customer' option.
- You have to complete this stage so if you are unable to get through you can either hang up and try again at regular intervals or wait on hold until someone answers. As long as you get through to someone it is up to you how you do this.
- You should record the length of your call from when you finish dialling the phone number.
- **IMPORTANT:** Remember to email cybershopqueries@gfk.com., if you cannot get through on the same day as your website check to prevent your assessment being automatically deallocated.

Starting the conversation:

When you get through to a member of staff you should pose as a potential new customer and say something like *"I'd like to switch my broadband and was wondering what deals you have at the moment?".* Please do re-word this as you see fit – do whatever feels natural to make a **general enquiry** that will prompt a discussion about their broadband.

DO NOT start the conversation by enquiring about broadband speeds, because we want to find out if this is given to you voluntarily.

Be prepared to give any of the following information if asked (you must use your real details):

- ✓ Name
- ✓ Postcode
- ✓ Address or House Number
- ✓ Landline Phone Number
- ✓ Current internet provider
- ✓ Deal/package you receive and what you pay for it
- ✓ What you use internet for e.g. normal surfing, TV viewing (e.g. BBC iPlayer), Voice calls (e.g. Skype), Films (e.g. LoveFilm)
- ✓ Speed of internet you currently pay for and/or receive

Important points to remember:

- If the member of staff starts talking about a bundle to switch your phone line as well, you can state you only want to switch your broadband at this stage. However, if you have to do both in order to get broadband then agree to this (you aren't actually switching but in order to get the speed information we want you may have to go along with this).
- Answer the questions they ask – do not refuse or decline to answer anything.
- If asked what type of package you want, remain vague but state you want a basic package (unless enquiring about BT Infinity).
- Try not to focus on the speeds only, and act interested in other factors such as cost to keep the conversation as natural as possible.
- On your coversheet is a grid of key information you need to make note of if you are given during the call and whether you had to prompt for this or not. The key information you need to make a note of is:
  -
    - **The estimated line speed**
    - **If there is a range of speeds. If so, the upper and lower speed limits**
    - **What to do if speed lower than estimated?**

- If you are not given any of the above information, your coversheet will tell you if you need to prompt for it (Prompt 1 and Prompt 2).

REMEMBER if you need to prompt for any information, this MUST be at the end of the call. We want to find out if the estimated line speed was given to you voluntarily, so please only prompt to get this if the call is coming to a natural conclusion and this information has not been given.

Ending the call

- The extent to which the member of staff will try and sign you up as new customer will vary however you are not purchasing anything so do not give any information out that would start this process.
- To end the call say something like "I'll need to think about it/discuss with my partner/have a further look around".

- You may decline follow up contact if they suggest it.
- If you do wish to switch your broadband service in real life and wish to purchase the product, you MUST NOT do this as part of the assessment. Please call back another time to do this.

	What happens if.....

? Getting information about broadband speed – to prompt or not to prompt?

IMPORTANT:
You MUST NOT prompt for 'Prompt 1' or 'Prompt 2' outlined on your coversheet **unless** the advisor is at the point of taking credit card details, getting a MAC code or ending the call.

If before they try to sign you up for a deal, they do not mention broadband speed **you will then have to prompt for this.** The grid on your coversheet will specify the questions you must get information for and therefore will need to prompt if not voluntarily mentioned.

-

? What if the member of staff tries to up sell me to a VDSL or cable service?

If you are completing an ADSL/Standard broadband assessment i.e. **not** Virgin (CABLE) or BT Infinity and get recommended their super-fast service then decline this and say you only want a standard speed (say you can't afford it). This may happen if you are calling BT Total Broadband and could receive BT Infinity – decline in Infinity product if suggested.

Website Audit Questionnaire

	Website Audit – 696986 – BBD13687				
	Section 1 – Assessment Details				
1.0	Date of website assessment (dd/mm/yyyy)	--/--/----			
1.1	Time started website assessment	:			
1.2	Time finished website assessment	:			
1.3	How did you find the majority of the information?	Used Search function on site	Used search engine	Click through pages	Other ✎
1.4	Select ISP that the audit was completed for (check coversheet)				
	Sky	O2			
	BT	Talk Talk			
	Virgin Media	Orange			
	PlusNet Broadband	Three (Go to 3.1)			
	Karoo	Vodafone (Go to 3.1)			
	CI-Net	T-Mobile (Go to 3.1)			
	Demon	Eclipse Internet			
	Fast.co.uk	Firenet Internet			
	GreenISP	IDNet			
	InTouch System	MacAce.net			
	Netplan Internet Solutions Ltd	Rutland Telecom			
	Solutios	Stream Networks Ltd			
	Vivaciti	Zen Internet			
	Section 2 – Audit Information				
	Broadband Speed Checker Facility				
2.0	Was there a broadband speed checker facility?			Yes ✎	No **(Go to 2.18) Speak to Exec.**
2.1	Was the broadband speed checker highly visible/prominent or were prompts given to encourage use of the line checker in order to test your line speed?			Yes ✎	No
2.2	What information does the line checker require to get a speed estimate?				
	g. Name			Yes	No

			Yes	No
	h. Address		Yes	No
	i. Postcode		Yes	No
	j. Telephone Number		Yes	No
	k. Email address		Yes	No
	l. Something else?		Yes	No
2.3	Please write in where the BB speed checker is accessible from (e.g. point of sale page, pages giving initial info on BB services/packages	🖊		
2.4	Estimated mid-point ADSL line speed provided?	Yes		No
2.5	Range of estimated speed provided?	Yes		No
2.6	Any other speeds specified? *Please state what speed information was quoted*	Yes 🖊		No
2.7	Was speed information about fibre optic broadband also given?	Yes		No **(Go to 2.12)**
2.8	Estimated mid-point fibre optic line speed provided?	Yes		No
2.9	Range of estimated speed provided?	Yes		No
2.10	Any other speeds specified? *Please state what speed information was quoted*	Yes 🖊		No
2.11	If fibre optic broadband was 'coming soon' at your address, what information was provided about this?	🖊		N/A
2.12	Did the text in the line checker make it clear that the speeds given were an estimate?		Yes	No
2.13	Was there any information about what can affect the speed of your broadband connection within the broadband speed checking facility?		Yes	No **(Go to 2.15)**
2.14	Please select what was mentioned:			
	j. Distance from telephone exchange		Yes	No
	k. The wiring quality e.g. fibre optic/copper wire explanation		Yes	No
	l. How busy the network is/the number of people online at any one time		Yes	No
	m. The network capacity of the broadband provider		Yes	No
	n. The time of day/day of week		Yes	No
	o. Quality of the phone line		Yes	No
	p. Their traffic management or fair usage policies		Yes	No
	q. Interference from electrics/devices at home – e.g. the layout of house, number of devices using electricity, number devices using wireless connections		Yes	No
	r. Other (please specify)		Yes 🖊	No
2.15	Any other relevant information found?		Yes 🖊	No
2.16	How easy was it to find the information you wanted about estimated line speeds?			
	1 – Not At all Easy 🖊	2 🖊	3 🖊	4 🖊	5 – Very Easy 🖊
2.17	How easy was it to understand the information found about estimated line speeds?			
	1 – Not at all easy to understand 🖊	2 🖊	3 🖊	4 🖊	5 – Very easy to understand 🖊
	General Website Information			
2.18	Was there any information about a Fair Usage Policy? *Please write in where on the website this is located*		Yes 🖊	No **(Go to 2.20)**
2.19	Was there any information about breaching the Fair Use Policy and/or what the ISP would do if users breached it?		Yes 🖊	No
2.20	Did the website contain any *additional* information explaining line speeds (e.g. 'up to' speeds, headline speeds, throughput speeds. *Please write in type of information given and where this is located on the website*		Yes 🖊	No
2.21	Did the website contain any information that explained how internet speed affects user experience? e.g. downloading music, TV, movie, photos etc. *Please write in type of information given and where this is located on the website*		Yes 🖊	No
2.22	Did you complete an audit for any of the following ISPs?			
	Sky	O2		
	BT	Talk Talk		
	Virgin media	Orange		
	PlusNet Broadband	Other ISP **(Go to End)**		
	Section 3 – Traffic Management			
3.1	Could you find traffic management information by clicking through the		Yes	No

	website?		
3.1a	When you searched for 'traffic management' using the search function on the website, were links to the traffic management policies/ Key Factor Indicator (KFI) table returned on the first page of results?		
3.2	Was there a Key Factor Indicator (KFI) table of information about the traffic management policies available on the website?	Yes	No **(Go to 3.5)**
3.3	Where was the KFI table on the website? Give weblink – save page and related documents/PDF	✐	
3.4	From which pages can you access the KFI table?	✐	Don't know
3.5	Was there any other information available about traffic management policies on the website? (If Yes, where was the information on the website and what was said. Include URL's)	Yes ✐	No **(Go to 3.8)**
3.6	Were there useful examples provided when appropriate to explain how aspects of the traffic management policy may affect consumers?	Yes ✐	No
3.7	Was there information about how different types of traffic e.g. music, video files, require different download speeds?	Yes ✐	No
3.8	Was there any option to give feedback on the KFIs/information on traffic management?	Yes ✐	No
3.9	How easy was it to find the information you wanted about traffic management?		

1 – Not At all Easy ✐	2 ✐	3 ✐	4 ✐	5 – Very Easy ✐

3.10	How easy was it to understand the information found about traffic management?

| 1 – Not at all easy to understand ✐	2 ✐	3 ✐	4 ✐	5 – Very easy to understand ✐

Website Audit Briefing Notes

GENERAL GUIDANCE

- **Please read the Glossary section** below to ensure you understand the terminology that may be used during your assessment both within these briefing notes, during data entry and on the websites .
- Please ensure you check which ISP you are completing an assessment with and make sure you assess the correct one!
-

** WEBSITE CHECK **

Visit the website of the ISP that is specified on your coversheet. You will be auditing the website and locating information on broadband speeds (including the Broadband speed checker facility) and for some providers will also be locating information on traffic management policies (this may related to home broadband, internet through smartphones or mobile broadband).

- Using a search engine, you must find the website address for the ISP you are assessing.
- Broadband speeds information/traffic management information may be spread around the website. Please browse the pages related to broadband packages/mobile broadband/smart phones/general FAQs etc and also use search functions to find any information that each provider makes available.
-
- Part of this audit relates to the broadband speed checker. This may not be the name of it for each ISP, however it will be called something like this. You may need to click through to the broadband pages to find the checker facility. It will probably look something like this:
-

-
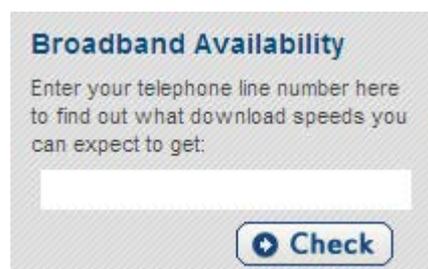
YOU MUST FIND THE BROADBAND SPEED CHECKER – PLEASE CONTACT THE GfK HELPDESK IF YOU CANNOT FIND IT.

- Enter the details required to check your line speed for this ISP. Please enter as much detail as you are able to i.e. if you are asked for your phone number and/or postcode please enter both.
- What is shown will vary by ISP however there should be at least information about the speed available and possibly the packages available to you at that line.
- You need to note down any speed information that is given to you (more details within the Questionnaire Completion section of this briefing). NB In this audit we are interested in the **types** of information are provided to you, rather than the numeric speed estimates that you may be given.

? What if the results of the speed check show you are not able to receive the ISP's service?
Please speak to the Exec who will advise on alternative postcode.

-
- **If in doubt about anything, please take a screen shot and speak to the Exec.**
  -
- The following questions should always have a screen shot. These should all be saved in the specified folder and should be saved in Paint as a .jpeg format. These should be saved in the relevant ISP folder with the filename of the relevant question number. Ensure you save in the VIN folder for that ISP.
  - **2.0**
  - **2.1**
  - **2.5**
  - **2.6**
  - **2.13**
  - **2.15**
  - **2.18**
  - **2.19**
  - **2.20**
  - **3.1**
  - **3.2**
  - **3.3**
  - **3.5**
  - **3.6**
    -
-

SECTION 1 – Website Audit

1.4 – Select the ISP that you are allocated to assess. There are different sections of the questionnaire that need to be filled out for the different ISPs:

Yellow	Section 2 only
Green	Section 3 only
Blue	Section 2 and 3

SECTION 2 – Broadband Speeds information

==**For ALL questions with a 'Yes' response please provide a screen shot.**==

2.0 – Speed checker facility looks at the estimated speed of broadband you can get in your area. Please copy and paste the weblink into the comment box. If you cannot find the speed checker please speak to the Exec.
2.1 – Browse through the website to see if the speed checker was easy to find.
2.3 – Please provide the page the speed checker was on and the weblink.
2.4, 2.8 – This should be a one figure estimate of the ADSL line speed. If shown then answer Yes.
2.5, 2.9 – These questions refer to the range of speeds for the ADSL line speed only e.g. 'Your estimated speed range is between xx and xx'. If this is given then answer Yes here and provide screenshot.
2.6, 2.10 – only answer Yes if there was any other information. Copy and paste what was said into the comment box.
2.7 – Information for the fibre optic line would be given in addition to the information on the ADSL line.
2.11 – If Yes, please copy and paste what further information was given about fibre optic broadband.
2.12 – Read any small print to see if it states that the speeds given are estimates.
2.13 – This should focus on the information given on the line checker pages – either the page where you get onto the line checker, or the results of the line checker. If there is other information on estimated line speed elsewhere on the website – this should be referenced in the 'general website information'.
2.15 – If there is any other information about line speeds then please copy and paste the weblink and text into the comment box.
2.18 to 2.21 – Please browse through the full scope of the website to see if you can find any of this information. Please copy and paste the weblinks and what information was available.

SECTION 3 – Traffic Management

<mark>**For ALL questions with a 'Yes' response please provide a screen shot.**</mark>

3.1 – try and find traffic management information by clicking through the website. This may be found on FAQ's, T&C's, Usage Policy, Legal or smartphone/broadband pages
3.2, 3.3
3.4 – when you find the KFI table, please note which page you found this i.e. the heading/title of the page. Please also provide the URL/document name where available. If you searched Traffic Management using the search function on the website and the KFI table is located on the first page you click on then please answer N/A. Otherwise if a separate link for the KFI table is on the first page then please state what page the link was on and provide a weblink.
3.5, 3.6, 3.7 – Please copy and paste what was said and provide the weblinks.

📋 **Glossary**

ISP: An Internet service provider (ISP) is a company that provides access to the Internet

BB speed: broadband speed affects how quickly information is passed to and from your computer though the internet. Essentially, if you download a lot of music, play online games or watch videos online, a faster broadband speed would mean a better experience.

Headline or advertised speed: This is the speed that ISPs use to describe the BB packages they sell. They are often described as 'Up to..' speeds as they could be a package that could give you 'Up to 8MBs'. These are only a guide to the speeds that could be achieved and at what price.

Estimated line speed (or access line speed): This is an estimate of the likely highest speed available to a *particular house* because of the connection between the broadband modem there and the local telecoms exchange (e.g. based on the distance). This can be checked based on postcode or telephone number information. This can be given as a range of possible speeds.

ADSL: Asymmetric Digital Subscriber Line (ADSL) is a data communications technology that enables data transmission over copper telephone lines. For the purposes of this assessment, unless otherwise stated (Virgin Cable or BT Infinity), you are enquiring about ADSL broadband or Standard broadband.

Download speed: sometimes called 'Downlink speed'. This is the speed which information is transferred to your computer from the internet.

Traffic management: techniques used by ISP's to handle internet traffic more efficiently, to prioritise traffic by type, to charge for guaranteed bandwidth or to block or degrade the quality of certain content. NB This can be referred to under varied names e.g. 'Network Management Policy'.

Annex 3 – Traffic Management Web Audit

The 5th Principle of Ofcom's Voluntary Code of Practice on Broadband Speeds says that where ISPs apply traffic management and shaping policies, they should publish on their website, in a clear and easily accessible form, information on the restrictions applied. This should include the types of applications, services and protocols that are affected and specific information on peak traffic periods.

The Broadband Stakeholder Group also launched a Voluntary Code of Practice on traffic management transparency. The code aims to ensure that consumers have access to more easily comparable information about the traffic management practices of different broadband providers. Among signatories, information should be provided in a common format to explain what traffic management techniques are used, when and with what impact for each broadband service currently marketed by the code's signatories. This common format takes the form of a 'Key Factor Indicator Table'.

For more information see http://www.broadbanduk.org/content/view/479/7/

As part of the overall website audit reported in the main body of this report, the audit also focused on the traffic management information available on the websites of providers who were also signatories of the BSG Code of Practice. Additionally these mobile broadband providers were included: Three, Vodafone and T-Mobile.

The web audits aimed to look at the traffic management information available relating to the ADSL offering of the following: BT Total Broadband, Talk Talk, Virgin DSL, Karoo, Sky and Plusnet. While the traffic management information related to smartphones and internet access was audited for the following: Orange, T-mobile, O2, Three and Vodafone

11 websites were audited on their Traffic Management Policies :

- all contained information on traffic management policies.

- When the auditor searched for 'traffic management' using the search function on the website, links to the traffic management policies or a Key Factor Indicator (KFI) table was returned on the first page of results for 7 out of 11 websites.

- On 11 out of 11 websites, auditors were able to find a KFI table.

- 4 out of 11 websites gave an option for customers to give feedback on the KFI table or information provided on traffic management.

GfK auditors were also asked to rate the website on a scale of 1 (not at all easy) to 5 (very easy) as to how easy it was to find information about traffic management:

   o 3 out of 11 websites were rated as very easy (rating of 5).
   o 5 out of 11 were rated as 4 out of 5, and 2 rated 3 out of 5 for ease of finding this information.
   o The lowest rating was 2 (one website)

The websites were also rated on how easy it was to understand the information found about traffic management (5 was very easy, 1 was not at all easy).

- All websites were rated at least 3 out of 5 for the information found, 6 were very easy (rating of 5)

Annex 4 –Web Audits for ISPs[31]

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[31] Note that Orange and Zen Internet have not signed up to provide speed ranges which is reflected in their audit document