

Ofcom: WLA broadband speeds

18 August 2017

Ofcom

WLA Broadband Speeds

6th – 11th September

Online

ASK ALL

1. Do you pay for, or contribute to, the bill for your household's broadband service? By this, we mean a fixed broadband connection to your home.

SINGLE CODE

1. Yes
2. No (**close**)
3. I don't know (**close**)
4. I don't have a fixed broadband connection at home (**close**)

ASK ALL WHO PAY FOR OR CONTRIBUTE TO HH BROADBAND SERVICE, Q1 CODE 1

2. Who is your current home broadband provider?

SINGLE CHOICE, RANDOMISED

1. BT



2. EE/Everything Everywhere



3. Gigaclear



4. Hyperoptic

hyperoptic

5. Kingston Communications (KCom)

KCOM

6. Post Office



7. Plusnet



8. Sky



9. SSE



10. TalkTalk

TalkTalk

11. Virgin Media (including NTL and Telewest)



12. Vodafone



13. Other (Please specify) **ANCHOR**

14. Don't know (**Close**) **ANCHOR**

- ASK ALL WHO PAY FOR OR CONTRIBUTE TO HH BROADBAND SERVICE, Q1 CODE 1
3. What is the maximum advertised speed you expect to receive from your home broadband service i.e. the download speed that your provider says your service can provide? Please only give an answer if you are relatively certain, it is okay not to know.
SINGLE CHOICE

[SHOW RESPONSE OPTIONS BASED ON RESPONSE FOR Q2]

For all CPs other than BT, Gigaclear, Hyperoptic, KCom and Virgin, present the following:

1. Up to 17 Mbit/s (megabit/ sec)
2. Around 38 Mbit/s (megabits/ sec)
3. Around 76 Mbit/s (megabits/ sec)
4. Other (**Please type in**)
5. Don't know

[For BT, CODE 1]

1. Up to 17 Mbit/s (megabit/ sec)
2. Around 38 Mbit/s (megabits/ sec)
3. Around 52 Mbit/s (megabit/ sec)
4. Around 76 Mbit/s (megabits/ sec)
5. Other (**Please type in**)
6. Don't know

[For Gigaclear and Virgin, CODES 3, 11]

1. Around 50 Mbit/s (megabit/ sec)
2. Around 100 Mbit/s (megabits/ sec)
3. Around 200 Mbit/s (megabit/ sec)
4. 300 Mbit/s (megabits/ sec) or more
5. Other (**Please type in**)
6. Don't know

[For Hyperoptic, CODE 4]

1. Around 20 Mbit/s (megabit/ sec)
2. Around 100 Mbit/s (megabits/ sec)
3. 300 Mbit/s (megabits/ sec) or more
4. Other (**Please type in**)
5. Don't know

[For KCom, CODE 5]

1. Around 50 Mbit/s (megabit/ sec)
2. Around 75 Mbit/s (megabit/ sec)
3. Around 100 Mbit/s (megabits/ sec)
4. Around 200 Mbit/s (megabits/ sec)
5. Other (**Please type in**)
6. Don't know

[For Other (please specify), CODE 13]

1. Up to 17 Mbit/s (megabit/ sec)
2. Around 20 Mbit/s (megabit/ sec)
3. Around 38 Mbit/s (megabits/ sec)
4. Around 50 Mbit/s (megabit/ sec)
5. Around 52 Mbit/s (megabit/ sec)
6. Around 75 Mbit/s (megabit/ sec)
7. Around 76 Mbit/s (megabits/ sec)

8. Around 100 Mbit/s (megabits/ sec)
9. Around 200 Mbit/s (megabit/ sec)
10. 300 Mbit/s (megabits/ sec) or more
11. Other (**Please type in**)
12. Don't know

DATA PROCESSING NOTE: On the basis of response to Q3 group respondents into:

- **Standard Broadband Product (up to 30 Mbit/s): Q3 = ONE OF Up to 17 Mbit/s (megabit/ sec) OR Around 20 Mbit/s (megabit/ sec)**
- **Entry-level Superfast Broadband Product (38-40 Mbit/s): Q3 = Around 38 Mbit/s (megabits/ sec)**
- **Faster Superfast Broadband (50-80 Mbit/s): Q3 = ONE OF Around 50 Mbit/s (megabit/ sec) OR Around 52 Mbit/s (megabit/ sec) OR Around 75 Mbit/s (megabit/ sec) OR Around 76 Mbit/s (megabit/ sec)**
- **Faster Superfast Broadband/ Ultrafast (100 Mbit/s+): Q3 = Around 100 Mbit/s (megabits/ sec) OR Around 200 Mbit/s (megabit/ sec) OR 300 Mbit/s (megabit/ sec) or more**
- **Unknown: Q3 = Other OR Don't know**

ASK ALL WHO PAY FOR OR CONTRIBUTE TO HH BROADBAND SERVICE, Q1 CODE 1

4. We would now like you to test the actual speed of your home broadband service using Ofcom's speed checker, which is available at this link: <https://checker.ofcom.org.uk/broadband-test>. Please follow the instructions in the link, and then click on the tab titled "Details" to view the results of this test. Please type in your speed in the box provided below.

Please only give an answer if you are currently completing this survey using a device which is connected to your home broadband service. If possible, please run the test from a computer or other device which is plugged into your home broadband router. If you are using a Wi-Fi enabled device, please run the test as close as possible to your Wi-Fi router i.e. while in the same room.

If you are at work or elsewhere, or you are using your mobile data connection (e.g. 3G or 4G), please do not complete the test and instead indicate this below by ticking the appropriate box.

1. Write in speed:
 - a. Download speed _____ Mbit/s
 - b. Upload speed _____ Mbit/s;

2. I am not currently using my home broadband connection

ASK ALL WHO PAY FOR OR CONTRIBUTE TO HH BROADBAND SERVICE, Q1 CODE 1

5. Do you pay line rental to a different provider to [INSERT PROVIDER SELECTED AT Q2]?

SINGLE CODE

1. Yes
2. No
3. Don't know

ASK ALL WHO PAY FOR OR CONTRIBUTE TO HH BROADBAND SERVICE, Q1 CODE 1

6. Which-of the following, if any, do you purchase as part of a bundle with your broadband service?

MULTI CHOICE, RANDOMISED

1. Landline calls package

2. Pay TV
3. Mobile
4. None of these **ANCHOR, EXCLUSIVE**
5. Don't know **ANCHOR, EXCLUSIVE**

SINGLE CHOICE

7. How much do you pay per month for your package from your home broadband provider?
 1. Less than £20
 2. £20-29
 3. £30-39
 4. £40-49
 5. £50-59
 6. £60-69
 7. £70-79
 8. £80-89
 9. £90-99
 10. £100 or more
 11. Don't know

Section 1: Current attitudes

SINGLE CHOICE

8. In general, is the speed of your home broadband service sufficient for your household, i.e. are you able to do the activities you want to with it?
 1. Always
 2. Often
 3. Sometimes
 4. Rarely
 5. Never
 6. Don't know

9. **[Ask to those who answered 3, 4 or 5 to Question 8]**
Why is your broadband speed not always sufficient for your household?

MULTI CHOICE, RANDOMISED

1. The download speed is too slow, e.g. buffering when loading videos
2. The upload speed is too slow, e.g. delays when sending emails, posting photos etc.
3. The connection is unreliable
4. Other (please state) **ANCHOR**
5. Don't know **ANCHOR, EXCLUSIVE**

SINGLE CHOICE

10. How often is your home broadband service used for several tasks at the same time? This could be several people doing the same type of activity, or different activities at the same time.

Please think specifically about activities such as downloading and uploading files, video calling and streaming TV or videos.

1. Every day
2. A few times a week
3. About once a week
4. Less often than once a week
5. Never
6. Don't know

SINGLE CHOICE GRID

11. How often is your home broadband used for the following activities?

ROWS, RANDOMISED

1. Downloading large files such as photos, videos, software, games or music
2. Uploading large files as photos, videos, software, games or music
3. Video calling (e.g. Skype)
4. Online gaming
5. Streaming live TV or video (e.g. Netflix, Amazon Prime) in standard definition (SD)
6. Streaming live TV or video (e.g. Netflix, Amazon Prime) in high definition (HD)
7. Streaming live TV or video (e.g. Netflix, Amazon Prime) in ultra HD (4K)
8. Streaming 3D TV or video
9. Virtual or augmented reality video experiences

COLUMNS

1. Every day
2. A few times a week
3. About once a week
4. Less often than once a week
5. Never
6. Don't know

[IF Q10 IS NOT 'Never' OR 'Don't know']

SINGLE CHOICE

12. Please think about activities such as downloading, uploading, video calling and streaming TV/ videos that you may do at the same time as each other.

Are you satisfied with the speed of your home broadband service while conducting these activities simultaneously?

1. Always
2. Often
3. Sometimes
4. Rarely
5. Never
6. Don't know

[Continue if did not answer “Other” or “Don’t know” at Q3; OTHERWISE ROUTE THROUGH TO THE END OF THE SURVEY – DO NOT SCREEN OUT]

Section 2: Changing service

SINGLE CHOICE

13. Have you changed the speed of your home broadband service within the last 12 months?

This could have been changing to a different speed service with your existing provider, or changing to a different speed service with a new provider.

1. Yes – I upgraded to a faster service
2. Yes – I downgraded to a slower service
3. No – I kept the same speed as before
4. Don't know

14. **[IF answered “No” to Question 13, CODE 3]**

Have you **considered** changing the speed of your home broadband service in the last 12 months?

SINGLE CHOICE

1. I have seriously considered and looked into upgrading to a **faster** speed
2. I have considered upgrading to a **faster** speed but not looked into it in a lot of detail
3. I have seriously considered and looked into downgrading to a **slower** speed
4. I have considered downgrading to a **slower** speed but not looked into it in a lot of detail
5. I have not considered moving to a **faster** or **slower** speed
6. Don't know

15. **[If answered 1 or 2 at Question 13 or 1-4 at Q14]**

Why did you [SHOW IF answered 1 or 2 at Q13: change] / [SHOW IF answered 1-4 at Q14: consider changing] the speed of your home broadband service?

MULTI CHOICE, RANDOMISED

1. For a cheaper price/ deal
2. The price of my old package increased
3. The change was automatic when I changed other parts of my bundle with other services (ONLY FOR Q13 = 1 OR 2)
4. I needed a faster broadband speed (ONLY FOR Q13 = 1, OR Q14 = 1 OR 2)
5. The contract with my previous provider ended
6. Someone I know recommended a different provider
7. My existing service provider automatically 'upgraded' the service (ONLY FOR Q13 = 1)
8. To get particular package features, e.g. a TV deal
9. Other (**please type in**)
10. Don't know

16. **[IF answered 1-4 at Q14]:**

And why did you not change the speed of your service?

MULTI CHOICE, RANDOMISED

1. It was too much hassle to change
2. I was worried about losing service
3. I would have incurred a cancellation fee with my existing provider
4. I would have incurred a connection fee with the new provider
5. I wanted a faster speed connection but wasn't available (**ONLY FOR Q14 = faster speed**)
6. The broadband service I wanted was too expensive
7. I would be happy with a slower connection but it wasn't any cheaper (**ONLY FOR Q14 = slower speed**)
8. I decided my current package was fine
9. My existing provider offered me a better deal
10. Other (**please type in**)
11. Don't know

SINGLE CHOICE

17. How likely are you to change the speed of your home broadband service in the next 12 months? When answering, please assume that the price of your home broadband service and the price of other speed services remains the same.

1. Certain to
2. Very likely
3. Fairly likely
4. Neither likely nor unlikely
5. Fairly unlikely
6. Very unlikely
7. Certain not to
8. Don't know

[IF answered 1-3 at Q17]

18. And what broadband speed do you think you would be likely to change to?

[Delete the speed they are currently on from the list (from Q3). If they said 20 Mbit/s, 50 Mbit/s or 75 Mbit/s, no need to delete any options]

SINGLE CHOICE

1. Up to 17 Mbit/s (megabit/ sec)
2. Around 38 Mbit/s (megabits/ sec)
3. Around 52 Mbit/s (megabit/ sec)
4. Around 76 Mbit/s (megabits/ sec)
5. Around 100 Mbit/s (megabits/ sec)
6. Around 200 Mbit/s (megabit/ sec)
7. 300 Mbit/s (megabits/ sec) or more
8. Other (**Please type in**)
9. Don't know

Section 3: SSNIP questions

ALL

[INSERT TIME DELAY]

[SHOW DIFFERENT PRICE POINTS DEPENDING ON RESPONDENTS' CURRENT BROADBAND SPEED]

19. Thank you for all the answers you have given us so far.

For the next section, we would like you to imagine that all home broadband providers charge the same monthly amount for your current broadband speed.

Now imagine that all providers raised that price by [SEE ROUTING INSTRUCTIONS BELOW] else] per month for the same broadband speed. The prices offered by all providers for all other speeds would remain the same as they currently are.

In that scenario, what would you do?

Your answers will not affect the real life future prices charged for your broadband.

[SPLIT SAMPLE ROUTING INSTRUCTIONS]

- IF RESPONDENT SELECTS Q3 "Up to 17 Mbit/s/Around 20 Mbit/s" SPLIT SAMPLE: £1 / £2.50
- IF RESPONDENT SELECTS Q3 "Around 38 Mbit/s" SPLIT SAMPLE: £1.50 / £3
- IF RESPONDENT SELECTS ANYTHING ELSE, Q3 SPLIT SAMPLE: £2.50 / £4

	"Up to 30 Mbit/s" codes	"Around 38 Mbit/s" codes	Anything else
Providers other than the list below	1	2	3-5
BT	1	2	3-6
Gigaclear			1-6
Hyperoptic	1		2-5
KCom			1-6
Virgin			1-6
Other (please specify)	1,2	3	4-10

RANDOMISE OPTIONS

1. Do nothing (i.e. stay on same service and pay the higher price)
2. [ONLY SHOW IF DID NOT ANSWER "Up to 17 Mbit/s" in Q3] Switch to a **slower** home broadband service
3. Switch to a **faster** home broadband service
4. Give up your fixed broadband connection and switch to a satellite broadband connection
5. Give up your fixed broadband connection and use mobile internet only (e.g. 3G or 4G)
6. Give up the internet altogether
7. Other (**please type in**)
8. Don't know

20. Imagine that the scenario of a **[PULL THROUGH SAME PRICE PRESENTED TO RESPONDENTS AT Q20: £X]** price rise happened today. How certain are you that you would take that action?

SINGLE CODE

1. Certain to
2. Very likely to
3. Fairly likely to
4. Don't know

21. **[IF ANSWER TO Q19 = CODE 2 "Switch to a slower home broadband service" AND speed from Q3 is 'Faster Superfast Broadband (50-80 Mbit/s) OR 'Faster Superfast Broadband/Ultrafast (100+ Mbit/s)]**

And what speed service would you be most likely to move to?

SINGLE CODE

1. Around 17 Mbit/s (megabit/ sec)
2. Around 38 Mbit/s (megabits/ sec)
3. [ONLY SHOW IF answer to Q3 was Around 75 Mbit/s or above]: Around 52 Mbit/s (megabit/ sec)
4. [ONLY SHOW IF answer to Q3 was Around 100 Mbit/s or above]: Around 76 Mbit/s (megabits/ sec)
5. [ONLY SHOW IF answer to Q3 was Around 200 Mbit/s or above]: Around 100 Mbit/s (megabits/ sec)
6. [ONLY SHOW IF answer to Q3 was 300 Mbit/s or more]: Around 200 Mbit/s (megabit/ sec)
7. Other (please type in)
8. Don't know

[IF ANSWER TO Q20 = CODE 3 "Switch to a faster home broadband service" AND Answer to Q3 was NOT "Around 200 Mbit/s" or "300 Mbit/s or more"]

And what speed service would you be most likely to move to?

1. [ONLY SHOW IF answer to Q3 was "Up to 17 Mbit/s"]: Around 38 Mbit/s (megabits/ sec)
2. [ONLY SHOW IF answer to Q3 was "Around 38 Mbit/s" or below]: Around 52 Mbit/s (megabit/ sec)
3. [ONLY SHOW IF answer to Q3 was "Around 52 Mbit/s" or below]: Around 76 Mbit/s (megabits/ sec)
4. [ONLY SHOW IF answer to Q3 was "Around 75 Mbit/s" or below]: Around 100 Mbit/s (megabits/ sec)
5. Around 200 Mbit/s (megabit/ sec)
6. 300 Mbit/s (megabit/ sec) or more

7. Other (please type in)
8. Don't know

22. **[SHOW QUESTION IF ANSWER TO Q18 MATCHES ANSWER TO Q21]**

You said earlier that you are planning to move to this speed service in the next 12 months. Would this price increase affect the timing of your move?

1. Yes – it would make me move sooner
2. No – I would move when I had originally intended

[IF 'Faster Superfast Broadband (50-80 Mbit/s) OR 'Faster Superfast Broadband/Ultrafast (100+ Mbit/s)]

23. Now we'd like you to imagine that the price offered by all providers **for all broadband speeds faster than 38 Mbit/s** increased by [SPLIT SAMPLE: £2.50 / £4] – not just the price of the speed you are currently on. As before, the prices offered by all providers for a 38 Mbit/s broadband service, and all slower services, would remain the same. What would you do in this instance?

RANDOMISE OPTIONS

1. Do nothing (i.e. stay on same service and pay the higher price)
 2. Switch to a **slower** home broadband service
 3. Switch to a **faster** home broadband service
 4. Give up your fixed broadband connection and switch to a satellite broadband connection
 5. Give up your fixed broadband connection and use mobile internet only (e.g. 3G or 4G)
 6. Give up the internet altogether
 7. Other (**Please type in**)
 8. Don't know
24. Imagine the scenario of a [PULL THROUGH PRICE PRESENTED TO RESPONDENTS AT Q24: £2.50 / £4] price rise happened today. How certain are you that you would take that action?
1. Certain to
 2. Very likely to
 3. Fairly likely to
 4. Don't know

25. **[IF ANSWER TO Q23 WAS CODE 2 "Switch to a slower home broadband service"]**

And what speed service would you be most likely to move to?

9. Around 17 Mbit/s (megabit/ sec)
10. Around 38 Mbit/s (megabits/ sec)
11. [ONLY SHOW IF answer to Q3 was Around 75 Mbit/s or above]: Around 52 Mbit/s (megabit/ sec)
12. [ONLY SHOW IF answer to Q3 was Around 100 Mbit/s or above]: Around 76 Mbit/s (megabits/ sec)
13. [ONLY SHOW IF answer to Q3 was Around 200 Mbit/s or above]: Around 100 Mbit/s (megabits/ sec)
14. [ONLY SHOW IF answer to Q3 was 300 Mbit/s or more]: Around 200 Mbit/s (megabit/ sec)
15. Other (please type in)

16. Don't know

IF 'Entry-level Superfast Broadband Product (38-40 Mbit/s) OR 'Faster Superfast Broadband (50-80 Mbit/s) OR 'Faster Superfast Broadband/Ultrafast (100+ Mbit/s)]:

26. Now we'd like you to imagine that the price offered by providers for **all superfast broadband services** increased by **[SPLIT SAMPLE: 1.50 / £3 FOR ENTRY-LEVEL SUPERFAST BROADBAND (38-40 Mbit/s) and £2.50 / £4 FOR FASTER SUPERFAST BROADBAND (50-80 Mbit/s OR FASTER SUPERFAST BROADBAND (100 Mbit/s)]**.

These are broadband services with an advertised download speed of 30 Mbit/s or more. As before, the prices offered by all providers for standard broadband services (i.e. less than 30 Mbit/s) would remain the same. What would you do in this instance?

RANDOMISE OPTIONS

1. Do nothing (i.e. stay on same service and pay the higher price)
 2. Switch to a **slower** home broadband service
 3. Switch to a **faster** home broadband service
 4. Give up your fixed broadband connection and switch to a satellite broadband connection
 5. Give up your fixed broadband connection and use mobile internet only (e.g. 3G or 4G)
 6. Give up the internet altogether
 7. Other (**Please type in**)
 8. Don't know
27. Imagine the scenario of a [PULL THROUGH PRICE PRESENTED TO RESPONDENTS AT Q26] price rise happened today. How certain are you that you would take that action?
1. Certain to
 2. Very likely to
 3. Fairly likely to
 4. Don't know
28. **[IF ANSWER TO Q26 WAS CODE 2 "Switch to a slower broadband service"]**
And what speed service would you be most likely to move to?
1. Around 17 Mbit/s (megabit/ sec)
 2. [ONLY SHOW IF answer to Q3 was 50 Mbit/s or above]: Around 38 Mbit/s (megabits/ sec)
 3. [ONLY SHOW IF answer to Q3 was Around 75 Mbit/s or above]: Around 52 Mbit/s (megabit/ sec)
 4. [ONLY SHOW IF answer to Q3 was Around 100 Mbit/s or above]: Around 76 Mbit/s (megabits/ sec)
 5. [ONLY SHOW IF answer to Q3 was Around 200 Mbit/s or above]: Around 100 Mbit/s (megabits/ sec)
 6. [ONLY SHOW IF answer to Q3 was 300 Mbit/s or more]: Around 200 Mbit/s (megabit/ sec)
 7. Other (please type in)
 8. Don't know