

Barriers to Broadband social tariffs

ALL ADULTS 18+ IN THE UK

Q.1 Which of these methods does your household use to connect to the internet at home?

MULTI CODE 1-5, SINGLE CODE 6

1. Fixed Broadband through a phone line or cable service – perhaps using a Wi-Fi router to go online, via any device.
2. Mobile Broadband from a mobile network – connecting via a USB stick or dongle or Mobile Wi-Fi router, or built-in connectivity in a laptop or netbook or tablet computer with a SIM card
3. Access to the internet using a mobile phone or smartphone – using your phone's 3G or 4G or 5G mobile network
4. Accessing the internet on a device such as a laptop or tablet using your mobile phone's internet connection – known as tethering
5. Other (WRITE IN)
6. Don't know (SINGLE CODE)

ALL ADULTS 18+ IN THE UK

Q.2 Which, if any, of the following services and devices do you have in your household?

MULTI CODE 1-5 SINGLE CODE 6

1. Landline to make and receive calls
2. Landline - pay line rental only, do not use this to make or receive calls
3. Mobile phone(s)/Smartphone(s)
4. A TV service with additional channels you pay to receive (e.g. Sky, BT TV, Virgin Media, EE TV, Talk Talk TV, etc.)
5. Any on-demand and streaming TV and video services that you pay to receive (e.g. Netflix, NOW TV, or Amazon Prime Video, etc.)
6. None of these services (SINGLE CODE)
7. Don't know

ALL ADULTS 18+ WITH FIXED BROADBAND IN HOUSEHOLD (Q1 CODE 1)

Q.3 Thinking about the internet connection in your household. Are you responsible, either solely or jointly, for deciding which broadband service to pay for and providers to use?

SINGLE CODE ALLOW DK

1. Yes -solely
2. Yes- jointly
3. No

ALL ADULTS 18+ WITH FIXED BROADBAND IN HOUSEHOLD (Q1 CODE 1)

Q4. Are you the account holder for your fixed broadband services? In other words, are the bills for these services addressed to you or do you personally receive any communication from your provider?

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

ALL ADULTS 18+ WITH A LANDLINE PHONE OR LINE RENTAL SERVICE- Q2=1 OR 2

Q5. Which providers do you use for your Landline phone and/or pay line rental to in order to receive your fixed broadband service?

Note: If you use more than one provider for your landline service please say which is the MAIN one you use or the one your household spends the most money on.

1. BT
2. EE
3. Shell Energy
4. GiffGaff
5. John Lewis
6. KCOM
7. NOW / NOW Broadband
8. The Phone Co-op
9. Plusnet
10. POP Telecom
11. Post Office
12. Sky
13. SSE
14. TalkTalk
15. Utility Warehouse
16. Virgin Media
17. Vodafone
18. Other
19. DK

ALL ADULTS 18+ WITH A FIXED BROADBAND SERVICE (Q1=1)

Q6. Which provider do you use for your Fixed Broadband service?

Note: If you use more than one provider for your broadband service please say which is the MAIN one you use or the one your household spends the most money on.

1. BT
2. Community Fibre
3. EE
4. Hyperoptic
5. Shell Energy
6. John Lewis
7. KCOM
8. NOW / NOW Broadband
9. The Phone Co-op

10. Plusnet
11. POP Telecom
12. Post Office
13. Sky
14. SSE
15. TalkTalk
16. Utility Warehouse
17. Virgin Media
18. Vodafone
19. Other

ALL ADULTS 18+ WITH A PAY TV SERVICE- Q2=4

Q7. Which provider do you use for your TV service?

1. BT
2. EE
3. Freeview
4. Freesat
5. NOW / NOW Broadband
6. Plusnet
7. Sky
8. TalkTalk
9. Virgin Media
10. Other

ALL ADULTS 18+ IN THE UK WHO HAVE MORE THAN ONE OF LANDLINE, BROADBAND AND/OR PAY TV SERVICE IN THE HOUSEHOLD- Q1=1/Q2=1, 2 OR 4

Q.8 Which, if any, of the following services do you receive from the same provider?

READ OUT

SINGLE CODE ALLOW NULL AND DK

1. Landline and Fixed broadband – **SHOW IF (Q2=1 OR 2) AND Q1=1**
2. Landline and Pay TV - **SHOW IF (Q2=1 OR 2) AND Q2=4**
3. Fixed broadband and Pay TV - **SHOW IF Q1=1 AND Q2=4**
4. Landline, fixed broadband and Pay TV – **SHOW IF (Q2=1 OR 2) AND Q1=1 AND Q2=4**
5. None of these
6. Don't know

ALL ADULTS 18+ IN THE UK

Q9. Do you or anyone in your household have any conditions that impact or limit their use of communication services? These can include, but are not restricted to, problems with hearing, eyesight, mobility, mental abilities or mental health.

DO NOT READ OUT

SINGLE CODE ALLOW DK AND REF

1. Yes

2. No

ALL ADULTS 18+ IN THE UK

I would now like to ask about annual household income. Any information given will be in the strictest confidence.

ALL ADULTS 18+ IN THE UK

Q10. What is your current total household income from all sources before tax, or any other deductions are made? Please include any benefits or credits that you or anyone else in your household receives, including household benefit, as well as any income from employment.

DO NOT READ OUT

SINGLE CODE ALLOW DK AND REF

PER WEEK-----PER YEAR

1. Up to £199 per week-----Up to £10,399 per year
2. £200 to £299 per week-----£10,400 to £15,599 per year
3. £300 to £499 per week-----£15,600 to £25,999 per year
4. £500 to £699 per week-----£26,000 to £36,399 per year
5. £700 to £999 per week-----£36,400 to £51,999 per year
6. £1,000 to £1,499 per week----- £52,000 to £77,999 per year
7. £1,500 and above per week.....£78,000 and above per year

ALL ADULTS 18+ IN THE UK

Q11. Could you please tell us whether you or anyone in your household currently receives any of the following benefits?

For each benefit shown, please indicate whether you personally receive this, whether someone else in the household receives this, or whether no-one in your household receives this benefit.

READ OUT

MULTI CODE 1-10, ALLOW DK AND REF

	Personally receive this benefit	Someone else receives this benefit	No-one receives this benefit	Not sure
1. Income Support				
2. Income-based Jobseeker's Allowance				
3. Pensions Credit (Guaranteed Credit)				
4. Pensions Credit (no Guaranteed Credit)				

5. Income-based Employment and Support Allowance (ESA)				
6. Universal Credit (and household has other earnings).				
7. Universal Credit (and household has no other earnings).				
8. Personal Independence Payment (PIP)				
9. Carer's allowance				
10. Other				

Now we'd like to understand a bit about the current broadband package you have

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q11=1-3, 5-8 and either personally receive or someone else does) WITH FIXED BROADBAND IN HOUSEHOLD (Q1 CODE 1)

Q12. Which of these fixed broadband services does your household have?

SINGLE CODE

1. **Standard broadband** – Broadband through a phone line or cable service - which is not superfast, so the download speed is less than 30Mbps
2. **Superfast broadband** – A premium service that delivers higher speeds through either fibre optic or cable service – so the download speed is 30Mbps or higher and less than 300Mbps
3. **Ultrafast broadband** – the download speed is 300Mbps or higher
4. Don't know

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q11=1-3, 5-8 and either personally receive or someone else does) WITH FIXED BROADBAND IN HOUSEHOLD (Q1 CODE 1)

Q13. How many people in your household typically use the broadband for the following activities?

	1 person	2 people	3 people	4 or more people	Don't do this	Don't know
Making video calls						

Streaming video content						
Accessing information and using social media						
Streaming audio (music, podcasts etc.)						
Sending emails/instant messages						
Online Gaming						
Online shopping/banking						

ASKED ONLY TO THOSE SELECTING ANY OF THE CODES IN COLUMNS 1-4

Q14. Which of these activities regularly happens at the same time as other online activities?

	Yes	No	Don't know
Making video calls			
Streaming video content			
Accessing information and using social media			
Streaming audio (music, podcasts etc.)			
Sending emails/instant messages			
Online Gaming			
Online shopping/banking			

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q11=1-3, 5-8 and either personally receive or someone else does) WITH EITHER STANDALONE BROADBAND (Q1=1 and NOT SAME PROVIDER AT Q5 OR Q7 AS Q6) OR BUNDLE BROADBAND AND LANDLINE (Q1=1 AND Q2=1 OR 2 AND SAME PROVIDER AT Q5 AND Q6). EXCLUDE THOSE WHO ARE TRIPLE-PLAY (Q1=1, Q2=1, 2 AND 4 AND SAME SUPPLIER AT Q5, Q6 AND Q7)

Q15. How much do you currently pay for your broadband service each month?

1. Less than £20
2. £20-£29
3. £30-£39
4. £40-£49
5. £50-£59
6. £60+
7. Don't know

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q1=1 AND Q11=1-3, 5-8 and either personally receive or someone else does)

Now we are going to ask you some questions about cheaper home broadband services that some providers only offer to people who are eligible to receive certain government benefits, such as Universal Credit. These can sometimes be referred to as social tariffs, targeted tariffs or targeted discounted tariffs.

Q16. Have you heard of cheaper home broadband services for people who receive government benefits before today?

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

ALL ELIGIBLE FOR A SOCIAL TARIFF (Q13=1-3, 5-8 and either personally receive or someone else does)

Q17. Why do you think some providers offer broadband social tariffs?

MULTI-CODE

ROTATE CODES

1. They are encouraged by the regulator (Ofcom)
2. It's good for their corporate brand/makes them look good
3. They want to make broadband available for everyone
4. The government makes them
5. The regulator (Ofcom) makes them
6. They want to support those on a low income
7. They want to help those who are struggling to pay their bills
8. They don't want to lose customers
9. Other (please specify)
10. Don't know

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q1=1 AND Q11=1-3, 5-8 and either personally receive or someone else does) AND THEIR CURRENT BROADBAND PROVIDER HAS A SOCIAL TARIFF (Q6=1,2,4,7,13 OR 17)

Q18. Is your household currently using one of these tariffs?

	Yes	No	Don't know
BT Home Essentials (ASK IF SELECTED CODE 1 AT Q6)			
BT Home Essentials 2 (ASK IF SELECTED CODE 1 AT Q6)			
Community Fibre Essential 10Mbps (ASK IF SELECTED CODE 2 AT Q6)			
Hyperoptic Fair Fibre 50 (ASK IF SELECTED CODE 4 AT Q6)			
Hyperoptic Fair Fibre 150 (ASK IF SELECTED CODE 4 AT Q6)			
KCom Full Fibre Flex (ASK IF SELECTED CODE 7 AT Q6)			
SKY Broadband Basics (ASK IF SELECTED CODE 13 AT Q6)			
Virgin Media Essentials broadband (ASK IF SELECTED CODE 17 AT Q6)			

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q1=1 AND Q13=1-3, 5-8 and either personally receive or someone else does)

Q19. If a social tariff saved you money and allowed you to use broadband in the same way you do now, how important would it be that the following elements are also included?

	Very important	Fairly important	Not important	Not important at all	Don't know
Able to move to and from a cheaper tariff with my current provider when needed with (i.e. no minimum contract period)					
Able to move to and from a cheaper tariff with another provider when needed (i.e. no minimum contract period)					

Able to leave my current contract without any fees					
Able to keep pay TV services for household entertainment					

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q1=1 AND Q13=1-3, 5-8 and either personally receive or someone else does)

Q20. To what extent do you agree or disagree with the following statements about broadband social tariffs?

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
They are not aimed at households like mine					
As they are cheaper, they're likely to be less reliable					
I would be happy for the person receiving benefits to be the broadband account holder					

ALL ELIGIBLE FOR A BROADBAND SOCIAL TARIFF (Q1=1 AND Q13=1-3, 5-8 and either personally receive or someone else does)

Q21. In the last 3 months, have you had any difficulties paying for your broadband service? You may have changed your package/tariff, reduced spend elsewhere e.g. on food or clothes to afford it, missed a payment or changed the way you pay for service by using credit cards or took out a loan.

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

ALL ELIGIBLE FOR A SOCIAL TARIFF (Q13=1-3, 5-8 and either personally receive or someone else does)

Q.22 How confident or not are you that you and your household will be able to pay for your communication services (landline, broadband, Pay TV and mobile phone) without making any changes in the next three months?

READ OUT IF NECESSARY

SINGLE CODE, FORWARD AND REVERSE CODES 1-4 ALLOW DK AND REF

1. Very confident

2. Fairly confident
3. Not very confident
4. Not at all confident
5. Prefer not to say
6. Don't know

ALL ELIGIBLE FOR A SOCIAL TARIFF (Q13=1-3, 5-8 and either personally receive or someone else does)

Q23. Finally, we would like to understand more about how you prioritise your payments. If you were struggling to pay your bills, please order from highest priority to lowest priority, for how you'd consider paying each of the following.

There is no right or wrong answer, we just want to build an understanding of how you prioritise your finances.

1. Water
2. Food
3. Clothes and footwear
4. Mortgage/Rent
5. Gas / Heating
6. Electricity
7. Broadband
8. Mobile phone
9. Landline
10. Pay TV
11. On-demand services e.g. Netflix, Amazon Prime, Disney+
12. Car/Travel costs
13. Council Tax
14. Other