Annex 2

Ofcom

BROADBAND SPEEDS ADVERTISING

CONSUMER RESEARCH

SUMMARY REPORT

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1. Executive Summary

- Customer acceptance and satisfaction with regard to current levels of broadband access speed are generally very high. This is due in part to low actual demand for bandwidth. It is also due to uncertainty as to what determines speed and what constitutes a fast or slow connection.

- This high level of customer acceptance looks to be changing gradually as consumers' experience with broadband deepens. What has been a 'novelty' in the past (at any speed) has now become one of life's essentials. The signs are that demand for 'instant' connectivity is growing, leading to more discernment with regard to maximum broadband speeds advertised and actual broadband speeds delivered.

- The evidence for this relates to mainstream adoption of internet based services like iPlayer which, along with other forms of high bandwidth streaming (like Skype for example), looks to be fuelling demand for higher speed and making a deficiency in speed more noticeable. It is clear that, as internet services continue to converge with broadcast media, consumers' reference points will change, fuelling demand for higher speed even further.

- Consumers are generally aware of a discrepancy between what they get and the maximum speed that is advertised.   Despite this, and at this time, few regard the discrepancy as a reason to switch. This suggests a lack of discrimination given that, for the most part, the speed delivered is experienced as adequate (or at least is believed to be adequate) for most needs.

- The evidence is clear that marketing on the basis of the maximum speed available is not working well enough to help consumers to discriminate between providers on the basis of actual speeds delivered.

- The indications are that . . .

    o Some consumers never find out (i.e., the experience of slower access provides no certain indication that it is less than the maximum)

    o For most, the actual speed meets or exceeds expectation (i.e., the experience of slower access is acceptable in most, if not all, circumstances).

- What follows from this is a lack of demand on the part of consumers, and therefore a lack of incentive on the part of providers to deliver better actual speeds. The exceptions in either direction are relatively few . . .

    o Some, particularly in rural areas, were more strongly dissatisfied by slow speed (given a larger gap between maximum and actual speed)

    o Others, in cabled areas, could be more strongly satisfied (given a smaller gap between maximum and actual speed, and the experience of ADSL as a 'slower' reference point).

- The evidence of this lack of demand is most strongly apparent among ADSL providers. Cable looks to be a far more effective driver. The downside, of course, is that cable remains more limited than ADSL in its availability to consumers and is particularly limited in availability to those living in rural areas.

- Overall, the evidence suggests a need to consider alternative marketing methods in order to stimulate demand for faster broadband speed.

- The particular need is for marketing methods that encourage consumers to be more discriminating with regard to the claims that providers make in their advertising. What consumers wanted was to be given an indication of what they may be likely to get by way of speed rather than the highest speed available.

- To this end, the underlying principles contained in the CAP / BCAP Options B, C1, C2& D were viewed positively by most. These were seen widely to provide a credible rationale for a higher level TSR, i.e., that providers were required to base their TSR figure on an industry standard of some kind.

- More specifically, qualifying the 'up to' maximum speed via a Typical Speed Range (TSR) was viewed positively and could be seen to help consumers make a more informed choice of provider on the basis of speed. TSRs could be seen in principle to . . .

    o Encourage consumers to exercise more discretion when choosing a provider on the basis of speed

    o Encourage providers to improve the actual speeds that are offered to consumers.

- Of the CAP / BCAP Options proposed, the majority tended to favour either C2 or C1, with A (the status quo) and B (availability to 10% of users) being most strongly rejected.

    o Option C2 worked particularly well in conjunction with TSR4, in making it clear that the typical performance speed must be based on the speed available to at least 50% of users. This tended to give more weight to the belief in there being a reasonable level of probability that they would get the typical performance speed that was stated.

- o Option C1 worked well in conjunction with TSR2, in making it clear that the typical performance shown as a range must be based on the average speeds received by 50% of users. 'Average' in this context was positive in suggesting that the figure was properly calculated.

- Notably, whilst the range in Option C1 can be seen as too broad and the lower figure off-putting, the actual effect of this is potentially positive in encouraging greater consumer discrimination and demand for a higher speed.

- Of the proposed TSRs tested, there was no outright 'winner'. All, inevitably, were viewed as deficient given that none provided a 'single figure' that accurately described the speed of access received by all subscribers to a service.

- TSR4 *("Up to 20 Mbps but the typical speed of this service is around 11 Mbps")* was most consistently favoured as the simplest and easiest to comprehend

  - o TSR4 was seen to make the best use of 'typical' as a high probability indicator in conjunction with a relatively motivating typical speed

  - o Also, a single figure, as opposed to a range was felt by many to be easier to use as a like-for-like comparison between providers.

- Among the remaining TSRs, TSR2 (*Up to 20 Mbps available, but most customers of this service will get an <u>actual</u> speed of between 4 and 12Mbps*) had strong merits and is worthy of consideration as the best range variant . . .

  - o On the one hand, the breadth and lower figure in the range was off-putting to consumers

  - o On the other hand, the breadth of the range and lower figure demanded more discrimination of consumers (and a motivation to search for better).

- Finally, across the sample, the strong preference was for any of the proposed TSRs to be given either equal or near equal prominence in the advertising. Placing a TSR in the small print of advertising renders it ineffective given little, if any, evidence, that it will be read.

2. Introduction

2.1 Background

Ofcom published a report in July 2010 which demonstrated that fixed-line broadband speeds are significantly lower than advertised speeds. This was particularly shown to be the case for ADSL providers.

Further to this, Ofcom has stated publicly that 'up to' broadband speed headlines used by broadband providers in their advertising need to change. This is because an 'up to' assertion may mislead consumers about the capabilities of the services that are offered. More specifically, Ofcom does not believe that current advertising practice allows consumers to make properly informed choices with regard to the comparative performance of different providers.

Accordingly, Ofcom has recommended that 'up to' speeds be used in advertising only when they can be supported by evidence that a significant proportion of an ISP's current customers can actually receive this speed in practice. Further, Ofcom recommends that a 'Typical Speed Range' (TSR) should always be included to provide a proper comparison point for actual speeds offered.

Currently, the Committee of Advertising Practice (CAP) and the Broadcast Committee of Advertising Practice (BCAP) are reviewing 'up to' broadband speed claims. The aim is to issue guidance to the Industry to ensure that consumers are not misled by the advertising of broadband services.

To assist in this, Ofcom required qualitative research among consumers to evaluate the guidance options that have been produced by CAP / BCAP.

2.2 Research Objectives

The primary objectives of this research were to:

- Evaluate the guidance options proposed by CAP / BCAP

- Provide recommendations on the most effective way to communicate broadband speeds information to consumers

Specifically, there was a need for the research to:

- Explore consumer awareness and understanding of broadband speeds

- Explore how consumers describe broadband speeds along with the language / terminology they use

- Test consumers' understanding of a series of potential TSR descriptions that may accompany headline figures used by broadband service providers

- Develop and refine these descriptions to ensure that they can be easily understood by consumers.

2.3 Method and Sample

A total of ten focus groups were conducted among a representative spread of UK broadband users that included a mix of . . .

- Cable, ADSL and mobile broadband users
- Providers subscribed to (including Sky, BT, Virgin Media, Talk Talk, Orange, O2 and The Post Office)
- Rural and urban locations, including London, Manchester, Cardiff and Edinburgh
- Users with different lengths and levels of experience of broadband

The sample was split according to life stage . . .

- Single / Pre-family   (3 groups)
- Family   (5 groups)
- Post-family   (2 groups)

Within each group, except Edinburgh, there was an equal split of . . .

- Recent upgraders / switchers (in the past 2 years)
- Intenders (intending to upgrade or switch in the next 12 months)

The groups in Edinburgh comprised . . .

- 'Heavy' broadband users, i.e., downloading larger than average amounts of data
- Recent Switchers, i.e., have switched provider recently (within the last year)

The research was conducted between 31st January and 3rd February 2011.

3. Main Findings

3.1 The demand for Speed

- **Few could imagine life without the internet**. The internet was now at the centre of most of the respondent's lives. It was, like a mobile phone, one of life's essentials. Not to have access was unthinkable.

- **Dependency on high speed was much less marked**. Speed was important to the extent that it did not slow consumers down. A higher speed was very desirable to provide an immediate, instant response at all times. However, for most situations and with most applications, the speed that most respondents had was regarded as acceptable.

  - *"For me, it's all I need, it's as quick as I can think" (Family, Cardiff)*

  - *"Just occasionally, you get a slow connection but it's never for long" (Post family, Manchester)*

  - *"It slows down now and again rather than all the time, so it's not a big concern really" (Family, Edinburgh)*

- **A few of the heavier users expressed a stronger level of dissatisfaction with speed.** These claimed that they had complained to their provider and had also considered switching. Typically though, unless a switch was made from ADSL to cable, few reported success in achieving any significant improvement in their broadband speed.

  - *"You can ask for a higher speed, but they'll say that it's not possible because of where I live.   It's hard to argue with that" (Pre-family, Edinburgh)*

  - *"I think you get what you are given and all the providers are the same. It's not in their power for one to offer me more than another" (Family, London)*

  - *"We just have to wait for cable to come to our area.   It is coming soon" (Pre-family, Cardiff)*

- **A few living in rural areas expressed a stronger level of dissatisfaction with speed.** Again, despite investigation and complaint, few reported success in achieving any significant improvement in their broadband speed.

  - *"We were told that there is nothing that can be done" (Family, Cardiff)*

  - *"I get 1 Mb or thereabouts and it does mean a slow speed when you are downloading something. It's okay otherwise." (Family, Banbury)*

- **Those making heavier use of streaming video applications (e.g., iPlayer and Skype) were more conscious of the need for speed.** The experience of a 'glitch' or delay when streaming was more often regarded as 'annoying' rather than unacceptable. This was because the problem tended to be occasional and intermittent rather than continuous.

  - *"For downloading movies I used to just do it overnight because it would take maybe seven hours, whereas now I'm finding movies you can download in like two, so I think it's speeded up in that respect" (Pre-family, Edinburgh)*

  - *"That's interesting what you said about iPlayer. I don't often do that but lately I have watched things on iPlayer and there's been a bit of a delay that I've never had before. That's quite recent" (Family, Manchester)*

  - *"If it was slow all the time, then I'd get annoyed about it. It is more a case of it being slow now and again. I am not really bothered by that" (Pre-family, London)*

- **Many in the sample were not making use of streaming applications.** The evidence suggests that mainstream use of streaming applications remains limited.   The internet, for many, is still regarded as an essential tool for 'information' and research, rather than a media centre for entertainment.   This means, of course, lower need and demand for bandwidth.

  - *"I know about iPlayer but we're not ready for that yet. We are looking into it" (Post family, Manchester)*

  - *"Sky let's me watch TV when I want to. I still don't think of the internet like TV" (Family, Banbury)*

  - *"I think of my computer as a work tool. It's in the study and I go to it when I need something" (Pre-family, Cardiff)*

- **Overall, the majority of broadband users are relatively non-discriminating and undemanding with regard to speed.** Whilst usage is frequent and often for long periods, traditional patterns of asynchronous data access could be seen to mean a relatively low demand on the provider for speed,

  - *"I'm quite happy with the speed it's at just now. I don't think it* [a faster speed] *would make a big difference" (Pre-family, Cardiff)*

3.2 Awareness, understanding and attitudes to speed

- **Awareness and understanding of broadband speed was limited.** Most saw it as a technical subject and lacked the confidence and motivation to investigate its meaning. For the most part, the vocabulary around it was poor. There were two main factors that contributed to this . . .

    - **Lack of comparative reference points** (i.e., by which to compare a fast or slow speed)

    - **Acceptance / belief that users 'get what they are given'** (i.e., it is not within their power to demand better)

3.2.1   Lack of comparative reference points

- **Generally, reference points were poorly developed.** The internet is still a novelty for most. What might seem slow to a heavy user enthusiast is very impressive to a relative novice. For those old enough to remember, broadband, even at the slowest of speeds, was a leap ahead compared to dial up. Very few have ever thought to test the speed, or determine how variable it might be over different times of the day.

    - *"It's all a bit too technical for me. Mega this and mega that. I'm happy with what I've got" (Family, Cardiff)*

    - *"It works. That's the main thing. If it went down, then, yes, of course, I'd be on the phone straightaway. But it's reliable enough" (Post family, Manchester)*

- **Most consumers did not know any different to the speed they currently had.** They claimed they did not know what was good and what was bad and that, in most situations, it seemed to be good enough. Typically, this led to less rather than more enquiry about the speed obtained by others by comparison.

    - *"I really don't know what speed mine is. Everybody's expectations are growing but everything seems to happen when you click it, so I don't know if that's fast or if that's normal but I'm quite happy with that at the moment." (Family, Edinburgh)*

    - *"I was told you just Google it, there's a test, you can do it. No chance. It was like some foreign language to me. Just go and it will tell you. What is it talking about?" (Post family, Manchester)*

- **Some reference points were more effective in making speed more important.** A switch from ADSL to cable (or vice versa) could be seen to have a stronger impact. Experience in different places / environments (e.g., work and home) also contributed. Some mentioned a family member (usually younger) suggesting that their internet speed was significantly faster. These factors tended to raise awareness that speeds varied but still did not motivate switching.

  – *"My son comes home from university and says my computer is awfully slow. He tells me I should upgrade and get a faster speed, but it feels alright to me. It's what you're used to" (Family, Manchester)*

  – *"It's faster at home than at work. I work for the NHS and the computers there are terribly slow. Mine at home is much faster" (Pre-family, London)*

3.2.2 Acceptance / belief that users 'get what they are given'

- **Most consumers did not think that it was within their power to demand a faster speed**. Many understood the principle of contention and expected that speed would be slower at peak times. Many also understood that, with ADSL, the distance from the exchange determined the maximum speed that they could get. Others were inclined to think that their own equipment determined the maximum speed they could get. Some even considered that the web-sites they visited determined the speed.

  All of this led most consumers to consider that the factors that determined speed were not within the power of the provider to influence.

  – *"It's a question of waiting until the technology improves. It's improving all the time and so we will get a faster speed eventually. It's okay in the meantime" (Family, Cardiff)*

  – *"I upgraded from about two megabytes to ten megabytes and nothing happened. In fact, it was a little bit slower. When I rang them they said it's because it's oversubscribed in my area and I didn't know what that meant. I thought, 'Okay, what do I do?" (Pre-family, Edinburgh)*

  – *"You do have glitches with whatever you're watching but you don't automatically think it's to do with your provider. You just think it's actually the site that you're on. I don't know if that's the wrong idea" (Family, Edinburgh)*

- **Few felt that they had the technical knowledge or confidence to question the capacity of a provider to supply a faster speed.** Even if it were possible for the provider to improve the speed, the general view tended to be that providers would be in a stronger position to argue against it, given limited technical knowledge and understanding on the consumer's part. As long as it worked, the tendency was to accept what they were given and believe what they were told.

  – *"I did call them up once to ask for a faster speed and they said it wasn't possible" (Pre-family, Edinburgh)*

- **Some, however, did not always believe what they were told.** They believed instead that the provider was fobbing them off or bamboozling them in some way. Whether this was the case or not, the belief could be that the provider was taking advantage, perhaps, of their ignorance.

  - *"They* [broadband providers] *bamboozle you into thinking that you can only have what you have because of where you live. I am in no position to question them, so you just accept it"* *(Family, Edinburgh)*

- **In all, it was difficult to assess the extent to which the provider was responsible for the customer's speed.** The result of this tended to mean deference to the provider and a somewhat docile acceptance of the speed they got. To some extent, this could be seen to exaggerate respondents' resentment with regard to other aspects of their provider's service, i.e., those aspects that they were more confident in talking about. In all, it was clear that customers were not making informed choices exercised on a fully-functioning market.

- **Many liked the idea of faster access but did not consider the need to demand it from their provider.** Like watching film or TV, the idea of an 'instant' internet experience, one that was consistently smooth / unbroken, appealed greatly. The difficulty was that few thought that it was possible to demand this from their provider.

3.3 Purchase dynamics – triggers and barriers to switching

- **Note:** The sample was recruited to include many who had switched their provider within the last two years or who were intending to do so within the next twelve months. Those who had not switched (or who had no intention to do so) claimed either to be 'happy', i.e., had not had reason to think about it, or felt that the 'reward' for changing was not worth the effort.

- **Among those who had switched, the reasons for doing so tended to be reactive and negative.** Reasons for switching related mainly to aspects of poor customer service, triggered mainly by installation problems, billing / charging issues and loss of service. Notably, speed was rarely mentioned as a reason to switch, or even as a reason to contact the provider.

  - *"The customer service is terrible. I phoned them once and the guy on the phone just lied to me"* *(Family, Edinburgh)*

  - *"Indian call centres. You can't understand a thing they are saying"* *(Post family, Manchester)*

- **Notably, all providers, both ADSL and cable, were often cited as having customer service problems leading to a negative view of the industry.** Some consumers were happy with the service they obtained from their provider. Many were not. Despite having plenty of choice, the feeling was that exercising this choice did not lead to any certain improvement in customer service. The tendency, instead, particularly among older consumers, was to accept that a high quality of personal service belonged to a past era. What seemed to be the case now was that consumers benefited mainly by paying less for a more basic level of service.

  – *"It is the way of the world. You just don't get personal service anymore" (Post family, Bury)*

- **There were few examples of proactive switching.** Few consumers claimed to have switched because of better deal or faster service elsewhere. The exceptions tended to be related to a package deal, where the deal or price for telephone and / or TV was the main attraction. For the most part, the broadband component of the deal (or as a service purchased in isolation), was viewed as reasonably priced, i.e., the promise of a lower cost for broadband elsewhere was rarely regarded as a sufficiently strong motivation to switch.

- **In general, the process of switching was not thought to be simple or easy.** Barriers to switching were felt by many consumers to be evident. Apart from the perceived hassle / effort in switching, some mentioned the difficulties in getting out of a contract. Also, there was the fear that, by switching, their email address would be lost. Quite often, consumers reported that, despite a bad customer experience, they ended up staying - either because their current provider had 'sweetened' the pill in some way or the experience of anger and frustration had passed.

  – *"I was told that I'd lose my email address if I changed" (Family, Cardiff)*

  – *"It's hard to switch when you're locked into a contract. You'd end up having to pay for two, whilst the first one runs out" (Pre-family, Cardiff)*

  – *"I got so angry that I cancelled it. But then they rang me up and promised to fix things and so I stayed put. It's just less hassle" (Post family, Bury)*

  – *"It's just even the thought of looking into what the hassle actually is just puts me off!" (Family, London)*

- **Speed did not emerge as a reason to switch.** The evidence suggests strongly that speed is not a factor that motivates most consumers to switch. Other factors, currently, have far stronger impact on switching behaviour.

  Importantly, speed became much more of an issue to consider once the decision to switch had been made. Once in the market to consider an alternative provider, the promise of a high speed was one of a number of considerations, along with price, that could be seen to influence choice.

3.4 Awareness and attitudes to providers' advertised claims about speed

- **Spontaneous mention and recall of the phrase 'up to' was strong and widespread.** Many mentioned 'up to' both before and during the discussion that related to broadband provider communication.   There was a great deal of scepticism about this as a claim regarding the likely speed that consumers would actually get.

  - *"It doesn't tell me anything. It makes me think that they are only able to say it because there is one person somewhere who actually gets 20 megs" (Pre-family, Edinburgh)*

  - *"Yeah, right, so they can say it because they have provided it to someone who lives right next door to the exchange and is using it at three in the morning" (Family, Banbury)*

  - *"It's like car manufacturers advertising the top speed of their cars. It tells you nothing because no one can ever drive it at the top speed" (Family, Edinburgh)*

  - *"They all say the same, up to 20 megabytes.   It doesn't tell me anything other than I could get anything between 1 and 20 from any of them. It doesn't help me to choose between them" (Pre-family, Cardiff)*

  - *"If they say, 'up to twenty' knowing that there is an exchange that can only go up to eight, then surely that is mis-selling. If they know you're in an area that is only serviced by a certain speed" (Family, Manchester)*

  - *"You need to know what percentage does get that 20mb. If it's 0.5% of 50-odd million, then it's nothing" (Family, Cardiff)*

- **Many, across the sample, were aware of the likelihood of a discrepancy, between the maximum speed that providers advertised and the actual speed that they received.** Despite this awareness, the evidence suggests very little inclination to avoid signing up with a provider upon discovery of receiving a lower speed than the maximum that was advertised.   Also, because of this awareness, the evidence suggests very little inclination to consider a provider on the basis of the maximum speed advertised.

  - *"I think we all know that 'up to' means that you aren't going to get the top speed" (Pre-family, London)*

- **In any event, few can recall the maximum speed that was advertised by the provider that they signed up with**. Despite being aware of the 'up to' claim that providers make, few could recall the specific maximum that their own provider advertised. In addition, very few knew what speed they actually received. All they felt they knew what that their actual speed was less than the maximum. None of this could be seen to impact significantly on the decision to choose one provider over another.

  - *"No idea. I think I was told or I clocked it at the time, but I've forgotten it now" (Post family, Manchester)*

- **There were exceptions with cable and particularly among those consumers who were considering a switch from ADSL to cable.** Associations with higher speed were more strongly developed among those who were considering a switch to cable. In general, consumers tended to consider claims by cable providers to be more reliable, i.e., that what they would receive would be closer to the maximum speed that was advertised. This belief was strengthened by recall of advertising that made reference to 'fibre optics' and maximum speeds that were significantly higher than ADSL providers, e.g., '50Mb'.

    - *"Cable is faster, or at least that's the impression I get"* *(Pre-family, London)*

    - *'Fibre optics. That's only by cable and it sounds very fast"* *(Family, Edinburgh)*

- **There was no recall or recognition of terms like 'superfast', 'ultrafast' or 'lightening fast'.** When shown, these terms tended to be reacted to with derision. They were regarded widely as 'marketing hype', that were exaggerated, provided no indication of actual speeds delivered and offered no means of choosing one provider over another on the basis of speed.

    - *"It is kids' speak. Very silly"* *(Family, Cardiff)*

    - *"Marketing rubbish"* *(Pre-family, London)*

    - *"It makes me laugh. It is just a way to exaggerate what they've got"* *(Post family, Manchester)*

- **There was, by comparison, a relatively strong and widespread level of recall of the term 'unlimited'.** This term was generally well understood to mean no limit to the amount of data that could be downloaded or uploaded. This was accepted at face value by some, i.e., it was assumed that 'unlimited' meant unlimited. Others were aware of the principle of a fair use policy. Among these, the sample were split over the use of the term 'unlimited' given that fair use actually limited the service in the event of excessive usage. Some felt that it was misleading, i.e., 'unlimited' should mean unlimited. Others felt that the term 'unlimited' was acceptable given that it applied in the vast majority of cases.

- **Overall, there was little evidence that current methods of communicating speed (particularly the 'up to' claim) worked to encourage consumers to switch on the basis of speed.** Current methods of communicating speed do not appear to encourage or improve consumers' powers of discrimination with regard to differences in the actual speeds that are offered by providers. This discrimination is more evident at point of sale when consumers have an opportunity to determine what actual speed they get from a provider.

    In effect, this means that current communication methods employed by providers do not help consumers to make an informed choice about speed prior to point of sale.

- **The evidence suggests a need, therefore, to consider alternative marketing methods**. Many consumers in the sample said they wanted to be given an indication in advertising of what they may be likely to get by way of speed rather than to be told the maximum speed available. In short, for advertising to be useful, it needed to convey a closer approximation to actual speeds that a provider delivers to its customer base.

3.5 Response to the CAP / BCAP Guidance Options

- **Note:** the CAP / BCAP Options were shown to all respondents (in random order). Before showing, it was explained that these options were being proposed by the CAP / BCAP for the purposes of consultation with Providers in the industry. The distinction between these options and the TSRs was made clear, i.e., that the options propose alternative methods of specifying the conditions under which the phrase 'up to' may be used, and how typical performance should be defined.

- **Overall, the majority in the sample tended to favour either Option C2 or Option C1.** Option D was not widely favoured but not widely rejected either. Option A (the status quo) and Option B (availability to 10% of users) were most strongly rejected.

> **Option C2:**
> Broadband providers may be allowed to quote their theoretical maximum speed provided that they also state the typical performance. The typical performance is based on the speed available to at least 50% of users. For example: 'Up to 24 Mbit/s'. 'Typical performance: 10 Mbit/s'

- **Option C2 could be seen to work well in conjunction with TSR 4.** This helped to make it clear that the typical performance speed stated in the TSR must be based on the speed available to at least 50% of users.   This could be seen to give more weight to the belief in there being a reasonable level of probability that they would get the typical performance speed that was stated.

  50% of broadband customers was viewed widely as an acceptably large enough representation of customers in order for the typical performance speed to be viewed as probable.

Option C1:
Broadband providers may be allowed to quote their theoretical maximum speed provided that they also state the typical performance. The typical performance is shown as a range which covers the average speeds received by 50% of broadband customers. For example: 'Up to 24 Mbit/s'. 'Typical performance: 8-12 Mbit/s'

- **Option C1 could be seen to work well in conjunction with TSR 2.** This helped to make it clear that the typical performance shown as a range must be based on the average speeds received by 50% of users. 'Average' in this context was positive in suggesting that the figure was properly calculated. As with Option C2, 50% of broadband customers was viewed widely as an acceptably large enough representation of customers for the typical performance speed to be viewed as probable.

- **For similar reasons given for TSR2, the range in Option C1 could be seen by many to be too broad and the lower figure was often off-putting.** Nonetheless, that actual effect of this is potentially positive in encouraging greater consumer discrimination and demand for a higher speed.

Option D:
Broadband providers must only quote a speed that is available to at least 50% of users. For a service that advertises 10 Mbit/s, some of the 50% who don't get 10 Mbit/s will get a considerably slower speed and some will receive a considerably faster speed
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- **Option D worked well in principle for many consumers in the sample but seemed to be less straightforward.** The use of a single typical speed figure tended to be liked, as simpler to understand. However, the qualification that follows it was regarded widely as complicated. Even when understood it could be viewed as reducing rather than increasing the probability of getting the advertised speed by focusing on what consumers some of the 50% don't get (rather than what they do get).

> **Option B:**
> Broadband providers may be allowed to quote their theoretical maximum speed
> provided that this maximum speed is available to at least 10% of subscribers and
> must prominently include the phrase 'up to'

- **Option B was widely rejected.** No matter what order this option was shown to the respondents in the sample, it was rejected strongly. The main reason for rejection was the 10% figure which, for most, was regarded as too small a proportion of subscribers. In other words, 10% of subscribers did not significantly increase the perceived odds of getting the maximum speed. To all intents and purposes, the addition of the 10% figure made little difference.

> **Option A:**
> Broadband providers may be allowed to quote their theoretical maximum speed.
> If some customers are likely to receive a slower service, then the maximum
> speed must include the phrase 'up to' and be shown prominently

- **Option A was also widely rejected.** Again, no matter what order this option was presented, it was rejected because it was widely recognised as the current rule (and therefore not an improvement). The current 'up to' phrase had been rejected well before this option was shown.

## 3.6 Response to the TSR Statements – Overall

- **Note:** Five Typical Speed Range (TSR) statements were shown to the respondents in the sample. These were presented in random order. Each respondent was ask to look through these five TSR and place them in order or priority, ranging from what they perceived to be the most useful through to the least useful as qualifiers to the 'up to' maximum speed that is currently used in advertising.

- **Overall, the idea of qualifying the 'up to' maximum speed via a Typical Speed Range (TSR) tended to be viewed as positive in principle.** Irrespective of which of the five TSRs were selected as useful, most consumers in the sample believed that some form of qualification helped to make a more informed choice of provider on the basis of speed.

  - *"It's better than just saying 'up to'" (Family, Manchester)*

  What the statements appeared to do well was to encourage consumers to think harder about the speed they were being offered by a provider.   Rather than not thinking about it all (or simply accepting the maximum speed at face value), the tendency was for the statements to help consumers to question what they were getting.

  - *"Some of them are complicated, but it forces you to think"   (Pre-family, Edinburgh)*

- **Of the proposed TSRs tested, there was no outright 'winner'.** All TSRs tested tended to be viewed as deficient. This was because none provided a 'single figure' that accurately described the speed of access received by all subscribers to a service.

  - *"I don't think any of them are perfect. What I want to know is what I will get and what that means" (Family, Cardiff)*

- **Each TSR statement tested was viewed by most as more or less useful depending on the following factors** . . .

  - **Simplicity** in sentence construction. In the context of advertising, there was a need for the TSR to be understood in one take if it was not to be missed or misunderstood prior to closer assessment at point of sale.

  - **Use of a typical speed figure** (rather than a typical speed range), as a simpler and easier measure to compare providers with. (This was despite many seeing some merit in the use of a range).

  - **Avoidance of the word 'maximum'** as a term that said little if anything to most consumers in relation to what they would get beneath this maximum.

  - **Avoidance of the word 'but' as a negative conjunction.**   Quite a few consumers felt that the use of 'but' made the TSR sound more negative than it was or needed to be

- **Use of the word 'typical' (or 'average') in conjunction with the word 'actual'** – as conversational and tangible, respectively

- **Striking a good balance between 'aspiration' and 'honesty'** (i.e., a higher speed at lower probability versus a lower speed at higher probability)

- **TSR4 *("Up to 20 Mbps but the typical speed of this service is around 11 Mbps")* was most consistently favoured as the simplest and easiest to comprehend.** TSR4 was seen to make the best use of 'typical' as a high probability indicator in conjunction with a relatively motivating typical speed. Also, a single figure, as opposed to a range was felt by many to be easier to use as a like-for-like comparison between providers.

- **TSR2 (*Up to 20 Mbps available, but most customers of this service will get an <u>actual</u> speed of between 4 and 12Mbps*) had strong merits and is worthy of consideration as the best range variant.** On the one hand, the breadth and lower figure in the range was disappointing and off-putting to consumers as 'too honest'. On the other hand, the breadth of the range and lower figure demanded more discrimination of consumers (and a motivation to search for better).

- **Overall, the TSRs tended to be evaluated by consumers in the sample using two main dimensions: 'probability' and 'appeal'**, i.e., the level of probability that they would get the typical speed and the motivating appeal of the typical speed or range stated as higher rather than lower (i.e., motivating in the degree to which consumers examined speeds and could come to the view that the typical speed offered was appreciably faster from provider A compared to provider B).

  As shown below, the tendency was to favour a TSR that conveyed an optimum combination of the highest level of probability and the highest typical speed associated with it.
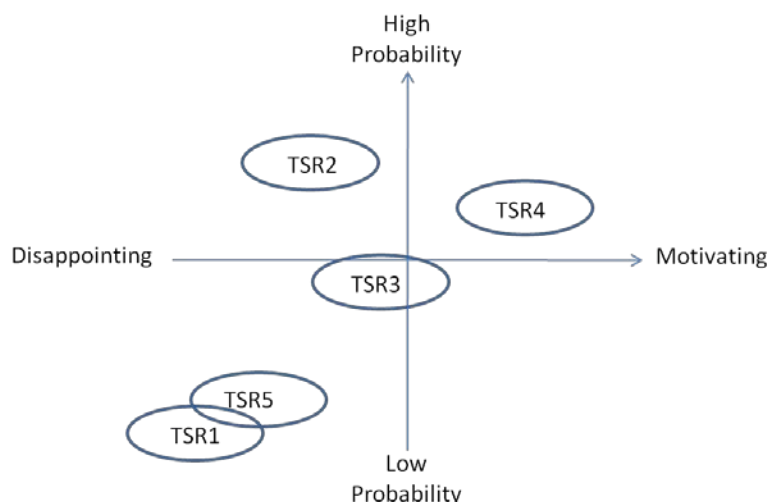
KEY:
TSR1: Up to 20 Mbps available, but most customers of this service will get a <u>maximum</u> speed between 3 and 13 Mbps
TSR2: Up to 20 Mbps available, but most customers of this service will get an <u>actual</u> speed of between 4 and 12Mbps
TSR3: Up to 20 Mbps available, but the typical <u>maximum</u> speed of this service is around 11 Mbps
TSR4: Up to 20 Mbps but the typical speed of this service is around 11 Mbps
TSR5: Up to 20 Mbps available, but the majority of customers get a <u>maximum</u> speed of less than 13 Mbps

3.7 Response to the TSR Statements – Detail

> **TSR 1**
> Up to 20 Mbps available, but most customers of this service will get a <u>maximum</u> speed between 3 and 13 Mbps

- **The use of the term 'maximum' was liked initially by many because of its 'honesty'.** However, making it clear that 'most' customer will get a maximum of between 'x' and 'y' says little if anything about speed they will get below this maximum. For this reason, many called for a minimum figure. Failing this, the great majority tended to reject this statement quite strongly.

    – *"It feels honest. It looks like I'm going to get somewhere between 3 and 13" (Pre-family, Cardiff)*

    – *"Actually, it says the maximum, so that means it could be less than 3. That would be very disappointing" (Family, Manchester)*

    – *"It could be anything below 13. I don't see the point of giving a range" (Family, Edinburgh)*

    – *"It's a bit of an odd way to look at it. It means I can only complain if the speed I get is above the maximum!   Which is silly" (Pre-family, London)*

> **TSR 2**
> Up to 20 Mbps available, but most customers of this service will get an <u>actual</u> speed of between 4 and 12Mbps

- **This statement worked well in terms of perceived honesty, but tended to disappoint.** Many liked the word 'actual'. This, in combination with the word 'most', worked well to convey a high level of probability that they would get a speed between the stated range. Having said this, many felt that the range was too wide, making the speed that they would actually get too vague. This said, many consumers ranked this TSR highly because it gave them a more realistic indication than the 'up to' term on its own.

    – *"I like the word 'actual'.   It says most will actually get. That makes me think that it is what I will actually get. It feels more guaranteed" (Family, Edinburgh)*

    – *"Makes you feel like you know what you are dealing with" (Family, Cardiff)*

    – *"The range is very wide. It means I'd most likely get anything between 4 and 12 which doesn't say a lot really. It's too wide" (Family, Manchester)*

    – *"I ranked this the highest, because it's honest. It's a lot better than just the 'up to 20 Mbps' on its own" (Pre-family, London)*

- **Several consumers were surprised that an advertiser would choose to qualify the 'up to' maximum to such a strong extent.** Many claimed that it was off-putting, i.e., some might get up to 20 Mbps but most will get a great deal less than this. Within this, the strong tendency was to focus on the lower rather than the higher figure in the range and to believe that this was most probably what they would get. Some mentioned spontaneously that this effect was positive in the sense that providers would be reluctant to state such a low figure, i.e., it would encourage them to improve what they offer.

  – *"It's a bit depressing. I mean you don't normally see this in advertising. I am put off by it" (Family, Edinburgh)*

  – *"It's a bit like the lottery saying you can win a million, but the chances of actually winning are very low. It's not what I want to be reminded of. I want to believe that I will win" (Family, Manchester)*

  – *"It shows a range which means that it could be up to 12. But it's only natural to see the 4 rather than the 12 and believe that that's what you are actually going to get" (Pre-family, Cardiff)*

  – *"I can see this being very off-putting to people which is quite clever. If I were the broadband company, I wouldn't want to say that" (Family, Manchester)*

TSR 3
Up to 20 Mbps available, but the typical <u>maximum</u> speed of this service is around 11 Mbps

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- **This statement was responded to in a similar way to TSR1 above except that many preferred the use of a single speed figure (i.e., 11 Mbps) rather than a speed range.** A single speed figure tended to be preferred by most because it was easier to take in and also less effort to compare between providers. The use of the term 'around' was also liked since it gave the figure a sense of it being a close approximation, i.e., most probably between 9 and 12.

  – *"11 is simpler. It makes it clearer that this is probably what you will get. I found the range to be too wide to be of any use" (Family, London)*

- **The use of the word 'typical' was also positive among many consumers.** The term was preferred strongly because it was well understood to mean 'most' or 'in most circumstances' which tended to indicate a relatively high probability and a feeling of certainty. In addition, the use of the word 'typical' made the TSR more user-friendly. Many commented on the fact that 'typical' was used in normal conversation. This gave the TSR a feeling of it being more helpful, as if a friend were offering them advice.

  – *"You use the word 'typical' in conversation. I prefer the sound of it. It's like someone talking to you. If they say typically, you know that means most of the time" (Family, Edinburgh)*

- **As with TSR1, the word 'maximum' was strongly disliked.** Many consumers felt that the term was unhelpful since it gave no indication of what actual speed, below the maximum, they would get. Some consumers believed that they would get a speed that was significantly below the maximum. Others felt that a minimum figure would be preferable.

  - *"I hate the word maximum. It tells me nothing. It could be anything below the maximum" (Pre-family, London)*

- **Notably, some consumers in the sample preferred the word 'average' as opposed to 'typical'.** Average tended to be preferred because it suggested that the TSR had been properly calculated in some way, i.e., that it was more likely to be a formula that all providers would be required to adhere to. This provided a stronger sense of certainty that the TSR was accurate. The use of the term 'typical' on the other hand could risk being too liberally interpreted by providers. This was also expressed as a worry with the use of other qualifiers like 'most' or 'around'. Other consumers in the sample countered this by expressing a concern that 'average' could also be open to interpretation, much as statistics are commonly thought to be mis-used.

  - *"Average makes it feel more calculated" (Family, Manchester)*

  - *"Average is better than typical;. Typical can be made to mean anything over 50%. You could get a situation where the broadband company says typical to give the impression of it being most when it is only 51%" (Family, Cardiff)*

  - *"You could make 'average' mean anything. You know what statistics are like. They can be used in all sorts of ways to favour a particular view" (Pre-family, London)*

  - *"I like average. There's a formula behind it. Typical is a thumb in the air. Average is a scientific measure" (Family, Edinburgh)*

- **On balance, the evidence suggests that 'average' be used (and explained fully) in the small print, to convey that the use of 'typical' is based on a robust calculation that is adhered to consistently by all providers.** This is not to suggest that the small print will be read by consumers. Rather, inclusion in the small print provides appropriate reassurance to those consumers who are inclined to question the underlying assumptions of the TSR at point of sale.

<div style="border:1px solid black; padding:10px;">

TSR 4
Up to 20 Mbps but the typical speed of this service is around 11 Mbps

</div>

- **This TSR worked well on a number of levels. Although the typical speed, i.e., 11 Mbps was motivating, it was not as high in perceived probability as the range TSR 2 variant**. This statement was widely liked because of its brevity. Many consumers in the sample felt that it was very straightforward and easy to comprehend in 'one take'. Moreover, the use of a single figure, i.e., 11 Mbps, was regarded by many as a simpler reference point for comparison (compared to a range).

  – *"It says that the speed of the service I am likely to get will be around 11 Mbps. I like that. It is simple and straightforward" (Family, Edinburgh)*

- **The use of the word 'typical' in this statement was also liked by many as conversational in tone.** This worked well to convey a familiar and compelling range of meanings, e.g., 'many', 'in many cases', 'normally', 'more often than not', 'most'. This helped to convey a reasonable level of probability that the consumer would get around the 11 Mbps stated. Notably, the term 'around' could be seen to imply a range, which was regarded positively as sufficiently narrow, i.e., perhaps 9 to 12 Mbps.

  – *"Around 11 means something near to between 9 and 12" (Pre-family, Cardiff)*

- **For a few, the use of a single typical speed figure tended to be less compelling than the use of an explicit range (as used in TSR 2 for example).** With this, despite the use of the word typical, there was some inclination to view the single figure as a mid-point rather than a measure of central tendency. This could suggest that subscribers could get well below 11 Mbps or well above it i.e., the statement could mean anything.

  – *"There is no maximum and no minimum either. So it could mean anything. It is too vague. A range is more specific because it has a maximum and a minimum" (Pre-family, Edinburgh)*

- **Overall, the majority in the sample tended to favour this statement.** For the most part, it was seen to do well to convey a good chance that consumers would get something close to the typical speed stated and that, if they didn't, this would be due to particularly extenuating circumstances.

  – *"The odds are that I will get 11. There's the chance I won't, but it gives me a good steer" (Family, Manchester)*

> **TSR 5**
> **Up to 20 Mbps available, but the majority of customers get a <u>maximum</u> speed of less than 13 Mbps**

- **This statement was most consistently rejected across the sample.** Many complained that the wording of the statement as a whole was complicated. In some cases, the grammar was viewed as odd, given an unusual combination of 'maximum' with 'less'.

    – *"It is an odd choice of words. It is not usual to see the word maximum with less. It feels like one contradicts the other"* (Pre-family, London)

    – *"I don't understand it"* (Pre-family, Cardiff)

- **For those who claimed to understand it, the tendency was to still regard the statement as meaning very little.** The main problem was the use of the term 'maximum' which said little, if anything, about what speed they may get below this maximum.

    – *"Less than 13 means what? It could be anything. It's too vague"* (Pre-family, Cardiff)

3.8 The desired prominence of TSR Statements in advertising

Note: Four alternative mock-ups were shown (in random order) that varied in prominence, as follows . . .

DIFFERENTIAL PROMINENCE (1):
- **Headline:** "Up to 20 Mb"
- **TSR:** in main body copy

EQUAL PROMINENCE:
- **Headline:** "Up to 20 Mb"
- **TSR:** Equal prominence with headline

DIFFERENTIAL PROMINENCE (2):
- **Headline:** "Up to 20 Mb" with asterisk
- **TSR:** as a 'disclaimer' in the small print

NO PROMINENCE :
- "Up to 20Mb" and TSR in the small print

- **Nearly all in the sample claimed to prefer either the equal prominence variant or the differential prominence (1) variant.** With either variant, there was a strong and widespread desire to see the TSR stated clearly.

   Seeing the TSR visually, in combination with 'Up to 20 Mb', could prompt some in the sample to question the need for the 'up to' element. Instead, the tendency was to prefer to see the TSR only.

   – *"Seeing it like that, I don't see the point of them stating the maximum speed. It doesn't really make sense to say what the maximum is if the typical speed is a lot less" (Family, Edinburgh)*

   – *I'd like to see just the typical speed as the headline" (Pre-family, Cardiff)*

- **Finally, none in the sample claimed to prefer to see the TSR in the small print.** The clear evidence is that few, if any, are inclined to read the small print in the context of advertising, i.e., prior to their decision to consider the offer in more detail at point of sale.

  Some claimed that they did read the small print but that this was prior to signing up for the service. Many claimed that they did not read the small print at any point.

4. Appendix

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Broadband Speeds Research
28th January 2011

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KEY RESEARCH OBJECTIVES

Overall, to . . .

- Evaluate the guidance options proposed by CAP / BCAP

- Provide recommendations on the most effective way to communicate broadband speeds information to consumers.

In detail . . .

- Explore consumer awareness and understanding of broadband speeds

- Explore how consumers describe broadband speeds along with the language / terminology they use

- Test consumer understanding of a series of potential TSR descriptions that may accompany headline figures used by broadband service providers

- Develop and refine these descriptions to ensure that they can be easily understood by consumers.

_____

Discussion Guide
1ˢᵗ February 2011

_____

MODERATOR INTRODUCTION

- Who we are; what we do, our independence, etc.

- Explanation of purpose of research: To get your views and opinions about broadband in the home and broadband providers

- Rules of conduct: need for honest feedback, no need for consensus, confidentiality of response, only one person should speak at a time, video and audio recording

- Part of my job is to ensure that everyone has an equal say – so occasionally I may stop you and ask you to hold your thoughts whilst someone else in the group has a say.

- Reassure: not a test; not putting you on trial; we are not here to test your technical knowledge. Perfectly fine if you feel you know, perfectly fine if you feel you don't. There is no expectation.
_____5mins

1. Participant introduction

Go around the table, one at a time, briefly . . .

- First name
- Job
- Interests

_____3 mins

2. Warm up on the topic of 'broadband'

Intro: Let's dive straight in.   Here's our topic for tonight.

Fill Flip chart page: Just give me words and phrases- no long sentences – all your thoughts and feelings that come immediately to mind. No right or wrong. Anything that comes to mind. I need to fill the whole page, so go for it!

KEEP GOING UNTIL EVERYONE IS CONTRIBUTING FULLY

NOTE ANY PARTICULAR ISSUES THAT PARTICIPANTS MENTION MORE STRONGLY AND PROBE VERY GENERALLY, I.E., 'WHY IS THIS MENTIONED MORE OFTEN?'
_____7 mins

3. Brief discussion around Usage& Attitude

Usage:
- o What you do want / need broadband for -> activities
- o How do they use it?
- o What do they do regularly? What do they do occasionally?

Prompt if necessary for usage models:
- o Browsing
- o Music
- o Film / video
- o Streaming
- o Iplayer
- o Software installation
- o Etc.

Satisfaction
- o Pleasure and pain points, with provider / service / services provided
- o Overall level of satisfaction with their broadband access (mark out of 10)

_____5 mins

4. Focus on buying process (Communication and PoS issues)

Explain: Let's move on to look at how you came to buy the broadband service you have got.

- **Providers**
  - o Who are they with, what other providers do they know about

- **Needs**
  - o What are they looking for from a provider?
  - o What are they looking for from the services provided?

CHECK:
- How long have they ever had access to broadband? What do they have (Cable / ADSL)
- Can they get access to cable?
- Why did they choose (cable versus ADSL)?
- Advantages of each (if known)

Focus on changing
- When did they last think about changing / reviewing their broadband service?
  - o Upgrading their service with existing provider?
  - o Switching to a different provider?

Explore barriers and triggers to changing:
- What makes them think about changing now? What prompts them?
- What, if anything, stops them from changing?
- Might this change in the future? How / why?

NOTE NOTE SPONTANEOUS OF SPEED AND WHAT ROLE IT PLAYS IN CONSIDERATION OF PROVIDER. DO NOT PROMPT!

_____10 mins

5. Focus on Provider communication - unprompted

Explain: Let's talk briefly about providers.

Get a quick view on each of the main providers (show brand on separate cards)

Then, explore cable, DSL and mobile providers, in terms of key strengths and weakness of communication in terms of . . .
- Services
- Quality of Service

Check for awareness of advertising
- Recall of headlines / body copy / claims
- How they feel about this advertising

IF MENTIONED, EXPLORE SPONTANEOUS AWARENESS AND UNDERSTANDING OF SPEED CLAIMS

- Note how they describe it / strength of feeling about it. Pick up on language / terminology that they use
- What is their strength of awareness of differences – between claimed and actual speeds

_____5 mins

6. Explain the Speed Claim Issue (gradual reveal)

Reveal our specific interest in speed.

If not already discussed, check:

- Do they know what speed they have?
- How do they describe it?
- When did they know this? Did they find out / were they told at the time of buying?
- How important is for them to know what the speed is?
- What role does it play when upgrading / switching?
- Was speed an important consideration in their purchase decision?

Explain: Providers can use a range of different terms to market their services. Here are some examples that we'd like to get your final thoughts on

"Superfast", "ultrafast", "lightning fast".

- How useful are these sorts of words? What expectations do these words convey?

- Should the speed of service always be quantified – i.e. with actual numbers – or is it sufficient for providers to use words to describe the service?

- If words are used to convey speeds, do they think that there needs to be rules around when these words can be used?

Explain: Reveal / make explicit that claims are not actual delivery

SHOW AND READ OUT BOARD 1:

> *Broadband providers often sell their products on the basis of the maximum speed available, not the actual speed you get.*
>
> *As it stands, the Advertising Standards Authority (ASA) allows providers to state the maximum speed that their service could provide and to use the term 'up to' to make it clear to consumers that they are not guaranteed to get the maximum speed.*

SHOW SOME CURRENT EXAMPLES

Briefly, invite views / open for discussion

THEN SHOW AND READ OUT BOARD 2:

> *The concern is that some customers receive a service that is considerably slower than the advertised maximum speed.*
>
> *For example, Ofcom found that average speeds delivered by one 'Up to 10 Mbps service' are more than double the average speeds of an 'up to' 24 Mbps service.*
>
> *The ASA therefore wants to ensure that consumers are not misled by broadband providers in their advertising.*

Briefly, invite views / open for discussion

THEN SHOW AND READ OUT BOARD 3:

> *The ideal, of course, would be to only advertise the actual speed that the customer will get. This is not possible. The actual speed you get depends on factors that are not within the control of the provider, e.g., . . .*
>
> - *A larger number of users accessing the broadband service at the same time reduces the speed. This is most evident with cable and mobile broadband.*
>
> - *For broadband via your landline telephone (ADSL), a longer distance from your house to the telephone exchange reduces the speed.*
>
> *This means that no single figure can accurately describe the speed of access that is available to all customers.*

Briefly, invite views / open for discussion

SHOW APPENDIX 1: to illustrate claimed vs actual speeds for different providers
_____15 mins

7. Introduce TSR Statements

Explain: Let's look at some ideas for the kinds of 'new' claims that Broadband Providers might have to work with. I have some here on a set of cards to hand to each of you in a minute.

Before I hand them out, what we would like you to do is to imagine you were trying to compare different broadband suppliers on a reasonable like for like basis for speed.   Take a look at these different options and place them in an order where your first selection is the one you feel is the best at helping you to compare between providers and then in subsequent order down to the last, which you consider to be the worst.

HAND OUT ON CARDS (AS A SET PRE-RANDOMISED). ASK PARTICIPANTS TO READ OUT THEIR ORDER AND LIST OUT ON A FLIPCHART.

Review order, going through each option . . .

- Invite discussion (referring to responses on the flipchart) and check understanding
- Check on key strengths and weaknesses

If not mentioned, check understanding of the following . . .

- 'Up to':
    – Is this the maximum speed they will ever receive?
    – Is this the maximum speed any customer with this provider will receive?
    – Do they think it provides a guide to the speeds they actually will receive?

- Typical speed:
    – Do they understand this to be indicative of the speed they will receive or indicative of average speeds across all customers taking this package?

- Typical speed range:
    – Do they think a range is a better communication of what speeds they will receive than a single point?
    – Do they understand this to be indicative of the speed they will receive or indicative of average speeds across all customers taking this package?

- Average speed:
    – If a single-point is provided, do they think "average" is a more useful descriptor than "typical"
    – Would they expect this to be the average speed they receive or the average speed of all customers taking this package?

- Which would they prefer – a typical speed or an average speed?

_____20 mins

8. Introduce the proposed CAP / BCAP Options

Explain: I have a few options here from the CAP / BCAP. Broadband providers will have to comply with one of these options when advertising the speed of their services. Only one will ever be utilised, so we have to look at each one on its own merits, rather than comparing between them, (i.e., in reality, you will never have seen the others to compare with).

Show one at a time, in random order. Important, encourage participants to look at each option on its own merits, i.e., discourage them from comparing between options.

For each Option . . .

- Ask each participant to give each option a mark out of 10 – in terms of how well does it works to allow you to make reasonable like-for-like comparisons between providers on the basis of the speeds that they advertise.
- Invite discussion (referring to individual questionnaire responses)
- Check on key strengths and weaknesses

DO NOT INVITE AN OVERALL COMPARISON AT THE END. JUST NOTE STRENGTHS AND WEAKNESSES OF EACH

_____20 mins

8. Developing the ideal TSR option

Explain: Let's revisit the TSR options we looked at a moment ago. I'd like now for you to look over these again and to consider . . .

- Whether your collective choice in Section 7 (READ OUT) is good enough for you to make a reasonable comparison between providers or would you choose another option?
    – Overall reactions
    – Reasons for / against

- If none is ideal, then design a new one, taking elements from one or more of the ideas on the table . . .

    ASK RESPONDENTS TO WRITE DOWN THEIR IDEAS INDIVIDUALLY AND THEN OPEN FOR DISCUSSION

_____15 mins

9. Prominence issue

Explain: The ASA proposes that any significant factors that limit the customer's ability to achieve an advertised speed must be stated prominently

MODERATOR: Using mock ups – APPENDIX 4 - present the following in random order, i.e., . . .

EQUAL PROMINENCE:
- **Headline:** "Up to 20 Mbps available"
- **TSR**: Equal prominence with headline

DIFFERENTIAL PROMINENCE (1):
- **Headline:** "Up to 20 Mbps available"
- **TSR**: in main body copy

DIFFERENTIAL PROMINENCE (2):
- **Headline:** "Up to 20 Mbit/s available" with asterisk
- **TSR**: as a 'disclaimer' in the small print

NO PROMINENCE :
- **Headline and TSR in the body copy**

Explore each on its own merits
_____10 mins

10. 'Unlimited' (briefly)

Many broadband services are offered as "unlimited" data use.

- What do consumers understand by the term "unlimited"?
- Listen if there are unprompted expectations that unlimited is typically subject to fair use policies
- Prompt: If seeing "unlimited use" in an advertisement, would they feel the need to check the small print to see if indeed the data is unlimited?

_____5 mins

THANK AND CLOSE