



QUALITATIVE RESEARCH FOR BROADBAND SPEED

Report for the Advertising Standards Authority,
prepared by GfK UK

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1 Executive summary

1.1 Background and objectives

The Advertising Standards Authority (ASA) is the UK's independent regulator of advertising across all media. It applies the UK Code of Non-broadcast Advertising, Sales Promotion and Direct Marketing and the UK Code of Broadcast Advertising (the CAP Code and the BCAP Code, collectively known as 'the Advertising Codes').

In 2011 the Committee of Advertising Practice (CAP) and the Broadcast Committee of Advertising Practice (BCAP) - the Committees - conducted a consultation which resulted in guidance for the industry on how to interpret the rules about misleading advertising when producing broadband advertising that contained a numerical speed claim (hereafter referred to as a speed claim)¹. The consultation responded to concerns that ads for broadband services cited headline speeds that reflected the theoretical maximum capacity of the service, not the service as it was delivered to real customers.

Since the introduction of the guidance, complaints to the ASA regarding speed claims have fallen by 60%. Also in that time, the reported average broadband speed has increased from 6.8Mbit/s in May 2011² to 28.9Mbit/s in November 2015³. The ASA and CAP are nevertheless aware of growing concern that the potential difference between advertised broadband speeds and the speeds that customers actually receive might result in consumers being misled.

Therefore the ASA and CAP commissioned GfK to undertake qualitative research into the advertising of broadband speed claims. The research was intended to find out what broadband consumers understand in relation to 'up to' speed claims made in ads, the context in which consumers interpret these claims, and whether such claims are likely to mislead consumers. The research also reviewed alternative speed claim formulations with consumers.

The aim of this research was to develop the ASA's understanding of whether consumers are likely to be misled by current broadband speed claim advertisements that conform to CAP and BCAP guidance. Specifically:

- Explore consumer understanding and interpretation of 'up to' speed claims made in adverts and whether these claims are likely to mislead
- Explore how consumers arrive at this understanding and interpretations of speed claims
- Explore reactions and potential actions in response to speed claim advertisements

¹ <https://www.cap.org.uk/News-reports/Consultations/Closed-consultations/~media/Files/CAP/Consultations/CAP%20and%20BCAP%20consultation%20on%20Broadband%20speed%20260111.ashx>

² <http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/bbspeeds2011/bb-speeds-may2011.pdf>

³ <http://stakeholders.ofcom.org.uk/binaries/research/broadband-research/nov2015/fixe-bb-speeds-nov15-report.pdf>

1.2 Method and sample

The research used a qualitative method, which involved 14 mini-groups of six participants, each lasting 2 hours, and 12 individual depth interviews each lasting 1 hour. Mini-groups provided an open forum where participants could share their experience and interpretation of the speed claims, and work together to generate changes and suggestions for improving consumer understanding. Depth interviews provided a private forum for understanding individual interaction with speed claims, interpretation of these and anticipated next steps after seeing a speed claim advert.

The sample was designed to focus on members of the general public who had recently purchased broadband / switched broadband provider, or were considering switching / purchasing broadband. In addition the sample included a mix of demographics, broadband use and self-reported knowledge levels of the internet and technology. The research was conducted across England, Scotland and Wales.

1.3 Understanding of broadband speed adverts

Clarity and interpretation of speed information in broadband adverts are impacted by three key factors:

- Attitudes towards advertising in general: there is a degree of skepticism towards advertising and an expectation that advertisers use 'marketing ploys', meaning that participants expected companies to promote their products and services in the most positive light and use 'hooks' to attract attention, however, they did not expect to be misled.
- Role of advert cues: participants responded to attention-grabbing cues such as use of celebrities or film characters. Language, and brand reputation also impacted on their interpretation of speed claims.
- Personal experience: understanding and interpretation of broadband speed adverts were affected by individuals' level of online usage and level of knowledge regarding technology or broadband services. The research identified five typologies:
 - 'No problems and never think about speed' (low usage and less knowledge)
 - 'Experienced problems and not investigated' (high usage and less knowledge)
 - 'Experienced problems and investigated' (medium-high usage and medium knowledge)
 - 'Rural focus' (high usage and more knowledge)
 - 'Tech savvy' (high usage and more knowledge)

1.4 Role of speed in broadband decision making

- Participants cited a range of factors taken into account during broadband purchase decisions. Customer service and brand were important to all participants, with customer service particularly important for those who had personally contacted customer services for queries and problems recently. Prices, deals and bundles, whilst important to many, were often a key concern for those who tended not to think about speed. Speed and reliability tended to be most important for those with more knowledge and higher levels of usage, particularly those who knew they needed high speeds to carry out their online activities, or those who had experienced problems with low speeds.
- Although varied across typologies, overall levels of knowledge and awareness of broadband speeds was low across participants.
 - Many did not understand what speed they needed to carry out their online tasks.

- Those with less knowledge did not always understand the difference between speed and reliability.
- Most participants believed that the higher the number advertised, the higher the broadband speed they were likely to receive. However, they were not clear on what this would mean for them and what speed they would likely achieve.
- Some held the belief that broadband speeds are fairly fixed. They felt that they would receive the same speed regardless of other factors, and that speed was not dependent on the provider.
- Where participants were interested in an advertised broadband product, a range of next steps were cited including:
 - Asking friends / family / neighbours for their experiences of the product.
 - Phoning the provider to ask for clarification of the product and terms. Some participants with more knowledge noted that they expected the provider to carry out a personalised speed check.
 - Carrying out online research (e.g. on price comparison or provider websites) to gather more information. This was most often noted by typologies with higher usage and those with typically more knowledge regarding broadband speeds.

1.5 Clarity of 'up to' speed claims

- Participants with lower levels of usage and knowledge about broadband speeds were most likely to assume that they would get the 'up to' speed.
- Others were uncertain about the speed they would receive and were often cautious in estimating what speed they would achieve based on the 'up to' claim.
 - Some expressed skepticism about claims made in advertising (in general).
 - Others noted that they had experienced problems with their broadband speed and anticipated that speeds received would vary depending on a range of factors.
- However, overall participants struggled to gauge the speed that they would expect to receive themselves at home. Those with more knowledge anticipated that they would not receive the top speed advertised but would achieve close to it.
- Some participants overlooked the phrase 'up to' and only when prompted to consider its inclusion wondered whether it was a marketing caveat to reflect that not all customers would receive the speed advertised.
- Overall, once made aware that an 'up to' speed claim advertised a speed that at least 10% of customers could achieve; participants felt that the claim lacked transparency. Because the speed advertised could be applicable to only 10% of customers they felt that based on the claim, they could not determine what speed they were likely to personally achieve.

1.6 Alternative speed claims

- Reactions to the alternatives tested were driven by participants' understanding of broadband speed and factors that can impact speed achieved.
- Although a range of alternative speed claims were tested, none enabled participants to determine what speed they were likely to personally achieve.

1.7 Role of additional information

- Participants were very positive about the inclusion of signposting to a speed checker in broadband adverts. Whilst typologies with more broadband speed knowledge were most likely

to note that they would do this anyway, they thought that a prompt would be useful. Those who had ‘experienced problems and not investigated’ found this information useful and were often keen to learn more about the broadband services they did / could receive.

- Information about download speeds was considered most useful for those who regularly carried out this type of online activity and therefore were able to interpret this information. However, there was some appetite for broader information regarding the speed required to carry out different online tasks; some participants mentioned that this type of information could help build their knowledge and understanding of broadband speeds. However, it was agreed that this type of information would be too detailed for an advert.
- Attitudes towards the inclusion of information on factors that could affect broadband speed was driven by personal experience and knowledge. Because this type of information was often included in advert small print, participants were often skeptical towards it. However, there was appetite amongst some to learn more about these factors, and participants agreed that this information could usefully be provided as part of an online speed checker.
- Participants with more knowledge and those who had experienced problems with their broadband were interested to learn about the types of technology available. Some already knew this information and agreed that it was useful. However, participants agreed that this information was too detailed to include in an advert but could be provided as part of an online speed checker.
- Use of comparisons within and across broadband provider services in adverts often resulted in confusion. This was particularly the case where speed was grouped with other factors (e.g. download limits and price).
- Participants did not think that the adverts shown in the research provided local speed information. Whilst some felt that this would be useful to have, they did not expect this degree of local information from national providers. However, those living in more rural areas and in Scotland did feel that local information would be useful in helping them determine what speed they would be likely to achieve. This was particularly the case for those who felt that their local area received lower speeds compared to the rest of the country.

1.8 Conclusions

- Overall, the interpretation of ‘up to’ speed claims is strongly influenced by levels of knowledge of broadband speed.
- Although varied across typologies, overall levels of knowledge and awareness of broadband speeds was low across participants.
- It was clear that many participants envisaged that the advertised speed – or close to it – would be relevant to the majority of customers.
- Those with less knowledge of speed believe they will receive the speed advertised.
- Those with more broadband speed knowledge understand that there are factors that can impact on speeds achieved but typically anticipate that they will achieve a speed close to the speed advertised.
- There is negative reaction to the explanation of the ‘up to’ speed claim. The claim is not considered to be transparent and not useful in helping people determine what speed they might expect to achieve.
- It is clear that speed claims need to be relevant to consumers, helping to manage their expectations regarding the speed they can personally expect to achieve.

- There is strong appeal for adverts to signpost to an independent online speed checker as a way to provide a tailored speed check. There is also appetite for further information regarding factors that affect speed to be included as part of this website.

2 Introduction

2.1 Background and objectives

2.1.1 Background

The Advertising Standards Authority (ASA) is the UK's independent regulator of advertising across all media. It applies the UK Code of Non-broadcast Advertising, Sales Promotion and Direct Marketing and the UK Code of Broadcast Advertising (the CAP Code and the BCAP Code, collectively known as 'the Advertising Codes').

The Committee of Advertising Practice (CAP) and the Broadcast Committee of Advertising Practice (BCAP) - the Committees - write and maintain the Advertising Codes and produce guidance to help the industry comply with the rules. The Advertising Codes contain rules about misleading advertising which seek to reflect the provisions of the Consumer Protection from Unfair Trading Regulations 2008. These provisions are intended to prevent consumers from being misled by commercial practices, including advertising.

In 2011 the Committees conducted a consultation which resulted in guidance for the industry on how to interpret the rules about misleading advertising when producing broadband advertising that contained a numerical speed claim (hereafter referred to as a speed claim)⁴. The consultation responded to concerns that ads for broadband services cited headline speeds that reflected the theoretical maximum capacity of the service, not the service as it was delivered to real customers. The central policy in the guidance is that a speed claim that is likely to be understood by consumers as the maximum speed of their service should be achievable for at least 10% of the relevant customer base. The guidance describes additional information that should be used to manage consumers' expectations about the speed they are likely to receive, including a virtually universal requirement to prefix speed claims with the words 'up to'⁵.

Since the introduction of the guidance, complaints to the ASA regarding speed claims have fallen by 60%. Also in that time, the reported average broadband speed has increased from 6.8Mbit/s in May 2011⁶ to 28.9Mbit/s in November 2015⁷. The ASA and CAP are nevertheless aware of growing

⁴ https://www.cap.org.uk/News-reports/Consultations/Closed-consultations/~/_media/Files/CAP/Consultations/CAP%20and%20BCAP%20consultation%20on%20Broadband%20speed%20260111.ashx

⁵ <https://www.asa.org.uk/News-resources/Media-Centre/2016/Research-into-consumer-understanding-of-broadband-speed-claims-in-ads.aspx#.V119p9lrJhE>

⁶ <http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/bbspeeds2011/bb-speeds-may2011.pdf>

⁷ <http://stakeholders.ofcom.org.uk/binaries/research/broadband-research/nov2015/fix-ed-bb-speeds-nov15-report.pdf>

concern that the potential difference between advertised broadband speeds and the speeds that customers actually receive might result in consumers being misled.

Therefore the ASA has commissioned GfK to undertake research into the advertising of broadband speed claims. The research was intended to find out what broadband consumers understand in relation to 'up to' speed claims made in ads, the context in which consumers interpret these claims, and whether such claims are likely to mislead consumers. The research also reviewed alternative speed claim formulations with consumers.

2.1.2 Objectives

The aim of this research was to develop the ASA's understanding of whether consumers are likely to be misled by current broadband speed claim advertisements that conform to CAP and BCAP guidance. If it appeared that consumers were being misled by current claims, the research was required to test potential alternative approaches to communicating numerical broadband speeds in advertisements to provide further insights into consumers' understanding.

The objectives of the research were to:

- Explore consumer understanding and interpretation of 'up to' speed claims made in adverts and whether these claims are likely to mislead
 - To include advertising for different broadband products (fibre, cable etc.), comparative speed claims and advertising where speed may be one of many aspects being advertised
- Explore how consumers arrive at this understanding and interpretations of speed claims
 - Explore interpretations of what the speed claims actually mean
 - Explore interpretations of who can achieve the speed claims
 - Explore how personal expectations are formed
 - Explore personal expectations about whether they will receive the advertised speed
 - Explore whether advertising at national, regional or local levels affect interpretations of speed claims
- Explore reactions and potential actions in response to speed claim advertisements
 - Explore reactions to the absence of information on speeds in broadband advertisements
 - Explore the extent to which consumers may be misled depending on geographic or socio-demographic factors

If it appeared that consumers were being misled by current claims, the research was to:

- Explore consumer understanding and interpretation of alternatives
- Explore whether any of the alternatives identified may be at risk of misleading broadband consumers

2.2 Research approach

2.2.1 Method and sample

The research used a qualitative method, which involved 14 mini-groups of six participants, each lasting 2 hours, and 12 individual depth interviews each lasting 1 hour. The qualitative approach

enabled the research team to explore fully how participants interpreted and responded to the speed claims and information provided.

Mini-groups provided an open forum where participants could share their experience and interpretation of the speed claims, and work together to generate changes and suggestions for improving customer understanding.

Depth interviews provided a private forum for understanding individual interaction with speed claims, interpretation of these and anticipated next steps after seeing a speed claim advert.

The sample was designed to focus on members of the general public who had recently purchased / switched broadband provider or were considering switching / purchasing broadband. In addition to this, the following criteria were taken into account to ensure a good spread and mix of participants:

- Demographics: mix of gender, age, socio-economic group and ethnicity
- Broadband use: mix of broadband provider, level of broadband use (e.g. low, medium or heavy use)
- Knowledge levels: mix of self-reported level of knowledge regarding the internet and technology
- Location: a spread of urban and rural locations across England, Scotland and Wales

A full breakdown of the sample is provided in the appendix.

2.2.2 Process for testing speed claims

The research⁸ set out to explore consumer perspectives on the clarity and interpretation of 'up to' speed claims, e.g. 'up to 17mb'. The fieldwork was conducted in three phases to allow for an iterative process whereby feedback from each phase was used to inform the next phase. All fieldwork began with participants completing an individual exercise to capture their spontaneous responses to speed claims.

Stage 1: The focus of research stage 1 was to explore understanding of 'up to' speed claims in detail with a view to testing potential alternatives and additional information should those claims be deemed by participants to lack clarity or meaning. Stage 1 specifically tested:

- The 'up to' speed claim as it is currently used in advertising.
- The following alternative speed claims and additional information:
 - 'Up' to speed claim plus explanation (at least 10% of customers)
 - 'Up to' speed claim plus range speed claim
 - 'Up to' speed claim plus 50% speed claim
 - 'Up to' speed claim where 'up to' relates to at least 25% of customers
 - 'Up to' speed claim where 'up to' relates to at least 50% of customers
 - 'Up to' speed claim plus additional information explaining that speeds may vary and directing consumers to an online speed checker

⁸ Research was carried out in line with the Market Research Society Code of Conduct

Each of these was shown separately on paper to ensure detailed views to each were gathered. Copies of the 'real' and mocked up adverts are provided in the appendix.

In stage 1 all participants were presented with the 'up to' speed claim in the first instance to ensure a clean read to test their views on clarity and interpretation of the claim. This was followed by rotation of the other claims / information to reduce the likelihood of research bias being introduced.

Stage 1 demonstrated that participants found the 'up to' speed claim unclear. Therefore some of the alternatives / information were taken forward for testing in stage 2 of the research. Additionally, further alternatives / information were developed for testing in stage 2.

Stage 2: This specifically tested:

- The 'up to' speed claim as it is currently used in advertising (as at stage 1)
- The following alternative speed claims and information:
 - 'Up' to speed claim plus explanation (at least 10% of customers)
 - 'Up' to speed claim plus explanation plus average speed claim
 - 'Up' to speed claim plus average speed claim
 - 'Up' to speed claim plus explanation, plus additional information explaining that speeds may vary and directing consumers to an online speed checker
 - Average speed claim
 - Average speed claim including the word 'customer'
 - Average speed claim plus additional information detailing download times for different tasks (e.g. downloading a movie)
 - Range speed claim
 - Minimum speed claim

These were shown in rotation across stage 2.

Following stage 2, participant feedback was used to refine the speed claims and information taken forward for testing in stage 3.

Stage 3: This stage specifically tested:

- The 'up to' speed claim as it is currently used in advertising (as at stages 1 and 2)
- The following alternative speed claims and information:
 - 'Up to' speed claim plus explanation (at least 10% of customers)
 - 'Up to' speed claim plus explanation, plus additional information explaining that speeds may vary and directing consumers to an online speed checker
 - Average speed claim including the phrase 'all UK households'
 - Range speed claim including explanation (80% of customers)
 - Minimum speed claim

In this final stage of the research, the 'up to' speed claim was seen in the first instance by all participants to ensure ample time was spent on this speed claim. Other speed claims/ information were then rotated.

Across all three stages of research a rotation was used to mitigate against order bias. This includes:

- Primacy effect: where participants respond most positively to the first stimulus they have seen.
- Recency effect: where participants respond most positively to the last stimulus they have seen.

- Order effect: where something already seen impacts on views for subsequent information shown.

2.2.3 Use of stimulus materials

Stimulus materials were used across the research to ensure that participants could interact with speed claims / information presented in a similar format to real life speed claims.

Across all three stages, participants were shown the following stimulus materials which contained 'up to' speed claims:

- Real life print adverts (BT, Sky, Virgin).
- Real life television adverts (BT, Virgin).
- Real life broadband provider websites (Plusnet, Post Office, Talk Talk). Please note that these were shown to 'depth interview' participants only.

In stages 2 and 3 of the research, example adverts containing alternative speed claims and information were mocked up by the ASA to enable participants to interact with these in a real life context. Copies of the 'real' and mocked up adverts are provided in the appendix.

2.2.4 Strengths of our approach

Employing a qualitative approach to the research to explore how people responded to numerical broadband speed claims allowed researchers to gather rich insights into participants' understanding and interpretation of the claims. These insights were increased by using a blend of mini-groups and individual depth interviews. The depth interviews provided a private forum for understanding individualised views and reactions whilst the mini-group setting provided a discursive forum where speed claims were debated and evaluated.

The key strength of a qualitative approach is that it enables researchers to gather spontaneous attitudes and insights, as well as highly nuanced feedback about the speed claims. Whilst qualitative discussions follow a clear structure, they emphasise the role of the participant in leading and driving the conversation through allowing them to answer in their own words and leading to responses that are full of rich insights. Participants are not limited in the way they answer the questions by being required to choose from multiple-choice answers as they would in a quantitative study. The requirement for exploratory, discursive and detailed views regarding the speed claims meant that qualitative research (as opposed to quantitative research) was the best-fit method for this study.

A qualitative research approach emphasises self-expression and insight over numerical outcomes. Whilst we included people from a wide range of backgrounds and with a variety of demographic characteristics, the qualitative nature of this research means the overall sample size is not statistically representative. The findings in this report focus on participants' understanding and interpretation of the speed claims, and reactions to alternative suggestions.

It should be noted that where typologies are mentioned these are qualitative in nature (and not a quantitative segmentation). Numbers are not assigned to typologies which are generated by analysing qualitative feedback from participants. The typologies reported in this report give a broad indication of the types of participants included in the research but are fluid; therefore some participants may sit between typologies, or over time, participants could shift between typologies.

3 Understanding of broadband speed adverts

Chapter summary:

Clarity and interpretation of speed information in broadband adverts are impacted by three key factors:

- Attitudes towards advertising in general: there is a degree of skepticism towards advertising and an expectation that advertisers use 'marketing ploys', meaning that participants expected companies to promote their products and services in the most positive light and use 'hooks' to attract attention, however, they did not expect to be misled.
- Role of advert cues: participants responded to attention-grabbing cues such as use of celebrities or film characters. Language, pricing information and brand reputation also impacted on their interpretation of speed claims.
- Personal experience: understanding and interpretation of broadband speed adverts were affected by individuals' level of online usage and level of knowledge regarding technology or broadband services. The research identified five typologies:
 - 'No problems and never think about speed' (low usage and less knowledge)
 - 'Experienced problems and not investigated' (high usage and less knowledge)
 - 'Experienced problems and investigated' (medium-high usage and medium knowledge)
 - 'Rural focus' (high usage and more knowledge)
 - 'Tech savvy' (high usage and more knowledge)

3.1 Clarity and interpretation of speed information

Across the research, participants' views on the clarity and interpretation of speed information in broadband adverts were driven by three key factors:



3.1.1 Attitudes towards advertising in general

Participants expressed a degree of skepticism towards advertising in general. This was driven by the view that adverts across a number of products and services may confuse people by:

- Hiding information - particularly costs - in small print.

- Showing costs for services (e.g. energy, telecommunications) that are caveated by either long contract tie-ins or by showing a reduced cost that is only applied to the cost of the service for a short amount of time before rising to a higher monthly charge.

Some participants also reflected that companies use ‘marketing ploys’ to advertise goods.

“An advert is an advert and it’s only meant to entice you.”

Shrivenham, considering purchasing / switching, BC1C2, 25-44 years

These participants felt that they were personally aware of ways in which companies made products appealing to consumers. They expected companies to promote their products and services in the most positive light and use ‘hooks’ to attract attention.

Whilst participants reflected that adverts often lack information about a service, they did not expect adverts to be ‘education pieces’. With this in mind they did not expect adverts to provide lots of explanatory information, noting that they were unlikely to read lots of detail within an advert.

A combination of cynicism and marketing savviness meant that participants agreed that they were unlikely to take advertising in general at face value. However, they also noted that they did not expect to be misled by adverts.

This general view of advertising was applied to how participants understood and interpreted the broadband speed adverts. In some cases participants concluded that they would be unlikely to take the ‘up to’ speed claim at face value. However, the lack of transparency regarding the proportion of customers who are able to achieve the ‘up to’ speed contributed to a belief that speed claims were misleading. As discussed later in section 5, once made aware that the ‘up to’ speed claim meant that at least 10% of consumers could achieve the speed, participants further noted that the ‘up to’ speed claim did not inform them of the speed they might personally expect to receive.

3.1.2 Role of advert cues

Across the research, participants clearly responded to the imagery, terminology, and the look and feel of the adverts tested. This type of quick and intuitive response to adverts is supported by a number of behavioural frameworks that demonstrate that perception and intuition⁹ and mental shortcuts (heuristics) play a key role in the interpretation of consumer facing information. Here, the following types of cues within the adverts presented to the participants often played a key role in their interpretation of the advert:

- Use of celebrities: for example, the use of Usain Bolt in Virgin adverts conveyed ‘speed’ to participants without them focusing on the rest of the advert content.
- Use of current films / characters: for example, the use of animated characters in Sky adverts tended to encourage participants to focus on the TV element of the package deal.
- Use of language: for example, the phrase ‘super-reliable’ (Sky) suggested to some that they would receive a constantly ‘good’ speed. The phrase ‘standard’ (BT) suggested to a few that they would receive the speed advertised as standard i.e. as the norm.

⁹ Daniel Kahneman Fast and Slow Thinking

- Use of pricing: where adverts included a price, this was often the key take-out for participants, who tended to focus on this information when evaluating the offer in the advert.
- Brand reputation: personal views and perceptions of the brand also influenced views of the advert with positive or negative perceptions and experience influencing reaction to the adverts.

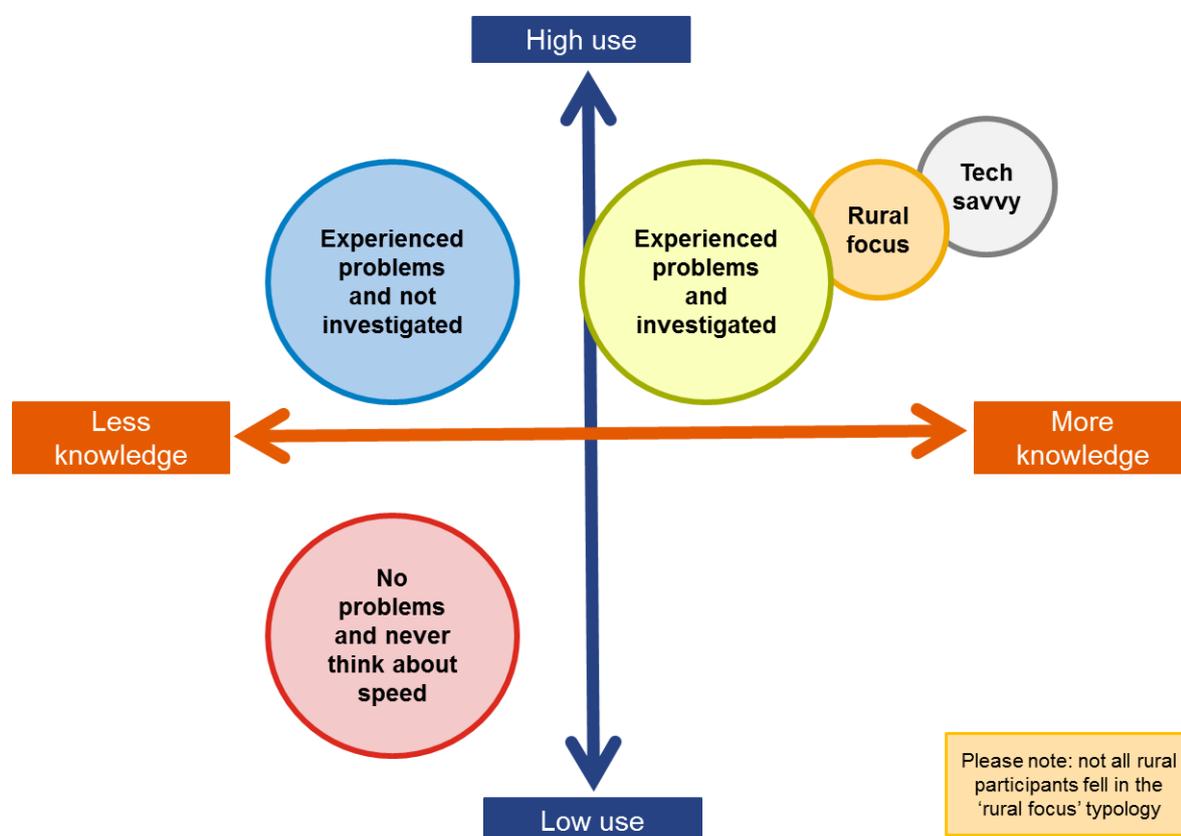
With the exception of pricing cues (which is factual information) the role of these advert cues meant that some participants were less likely to focus on the more factual information provided in the adverts, or take time to consider these fully. This finding is discussed in more detail in chapter 6.

3.1.3 Personal experience

Two aspects of personal experience affected participant understanding and interpretation of speed claims in adverts:

1. Level of usage: defined by the type of activities carried out online; number of people in the household using the internet; and frequency of use - those with higher levels of usage were often more aware of, or interested in, information relating to broadband speed.
2. Level of knowledge: a range of knowledge regarding broadband speed emerged across the research. Whilst overall participants had low levels of knowledge, comparatively some had more than others. Those with more knowledge of broadband speed tended to have a personal interest in technology; had spoken to friends/ family/ neighbours about local broadband provision; had spoken to their provider about issues regarding speed; had carried out a speed check; or, had recently switched supplier. Based on these activities, these participants tended to have more knowledge relating to broadband speed.

With these two factors in mind, five general typologies emerged across the research. These are shown in the following diagram. The size of each circle gives a broad indication of the prevalence of each typology across the research.



3.1.4 No problems and never think about speed

→ Low usage and less knowledge

Participants that fell into this typology were infrequent internet users, often using the internet for basic tasks such as email, browsing and social media. They typically had not experienced issues with speed; if they had, they did not find these to be problematic. The combination of low usage and not experiencing any problems meant that this typology tended never to think about speed, and it was not a factor taken into account when choosing a broadband supplier. When prompted to consider speed, they concluded that it must be important but lacked knowledge regarding:

- The speed that they personally receive
- What different speeds translate to in terms of online activity, e.g. what speed is required to carry out different types of online tasks
- How speed is different to download limits

Whilst this typology assumed that speed must be important, because they had such limited experience of problems, or knowledge of speed, many simply reflected that they were most likely to take price into account when choosing their broadband supplier.

Case study: Marie



No
problems
and never
think about
speed

- 66 years old, retired
- Goes online for email and browsing
- Has experienced some buffering but is not concerned about this; she is not usually in a rush
- Her key concern when considering a broadband provider is price
- She does not know what different speeds mean
- Unlikely to use a speed checker service as happy with speed she currently receives

3.1.5 Experienced problems and not investigated

→ High usage and less knowledge

Participants that fell into this typology were usually low-medium internet users, but others within their household (including children) were often heavier users. They typically had experienced problems with broadband speed – such as buffering and slow speed when multiple users within the household were online at the same time – but these problems were usually occasional and not ongoing. Due to lower levels of knowledge and confidence when compared to other participants across the research, this typology was less likely to follow up on these problems, and often described these experiences as relating to ‘reliability’ (e.g. not losing connectivity) rather than speed. When prompted to consider speed, although they assumed it was important, they lacked knowledge regarding:

- The speed that they personally receive
- What different speeds translate to in terms of online activity e.g. what speed is required to carry out different types of online tasks
- How speed is different to download limits

This typology assumed that speed must be important and there was an appetite for becoming more informed by finding out more about factors that affect their speed, and using speed checkers. This was due to the fact that they had experienced problems with speed in the past and wanted to learn how to improve speeds, particularly as other members of their household were reliant on broadband.

Case study: Sue



Experienced
problems
and not
investigated

- 38 years old, stay at home Mum
- Personally uses broadband for TV, email, browsing
- Her children are heavy users with streaming, downloading films and social media and they occasionally complain about slow speeds but she has never looked into this
- She is interested to find out about different speeds available, speed checkers and factors that can affect speed. She is likely to look into these now that she has been made aware of them.

3.1.6 Experienced problems and investigated

→ Medium-high usage and medium knowledge

Participants who fell into this typology were typically medium-high users, and frequently used the internet. This typology had usually experienced problems regarding their broadband speed and had contacted their provider or conducted some research to rectify the problem. The combination of high usage, experiencing problems related to speed and trying to resolve them meant that this typology were more likely to have used a speed checker and were more likely to be aware of:

- The factors that can affect broadband speed
- The speed that they personally receive
- How broadband speeds vary in the market place

This typology regarded speed as important and this was usually a key factor when making broadband purchase decisions. This was largely due to the problems they had previously experienced with speed. However, other factors such as price and customer service were also regarded as important when making purchase decisions.

Case study: Andy



Experienced
problems
and
investigated

- 32 years old, electrician
- Goes online for gaming, downloading, social media, streaming
- Has experienced problems with speed and complained to his provider. The speed performance did not change so he switched provider.
- Speed was a key factor considered when switching, along with price and package deals

3.1.7 Rural focus

→ High usage and more knowledge

Many participants who lived in a rural area fell into this typology, although it should be noted that some rural participants fell into the other typologies. Largely, those who fell within this typology were heavy, frequent online users conducting tasks such as downloading and streaming content. All within this typology had experienced a wide variety of problems regarding broadband speed including; signal 'drop out', buffering, regularly receiving 'slow' speeds, only receiving signal in certain parts of the house and broadband coverage only offered by certain providers. These problems and experiences were usually encountered frequently, and were often ongoing. This meant that speed was usually top of mind for this typology, and they were more likely to have carried out research, complained to their provider or spoken to others regarding speed and the problems they had experienced. Due to these factors and experiences, these participants tended to have more knowledge when compared to other participants regarding:

- The factors that can affect broadband speed, including location
- The speed that they personally receive
- Different connection types used and how this affects speed

Due to the problems experienced - where many felt the root cause was due to the location where they live - and their reliance on broadband, speed was usually the top consideration when making purchase decisions. There was large appeal and appetite amongst this typology for local information in advertising so that they could receive location-specific speed, which was regarded as the most useful.

Case study: Kate



Rural
focus

- 45 years old, yoga instructor
- Goes online for streaming films, shopping, email, social media and Netflix
- Husband and daughter also live in the household and are also heavy users of the internet
- So her key concern is speed
- She regularly uses speed checkers to keep a close eye on broadband performance
- She has complained to broadband provider in the past due to slow broadband speeds

3.1.8 Tech savvy

→ High usage and more knowledge

Participants who fell into this typology were largely frequent, heavy users and were more likely to have the latest technology and perform more complex online tasks. Broadband speed was often considered a priority for those within this typology; this was usually due to the fact that fast speeds were required to perform the online tasks they carried out. To ensure fast speeds were achieved, this typology was more likely to conduct speed checks, switch supplier and conduct research. Across the research this typology usually had the most knowledge regarding speed including:

- The factors that can affect broadband speed
- The speed that they personally receive
- The speeds offered by different providers
- What speed translates to in terms of online activities

This typology regarded speed as the most important factor when making broadband purchase decisions. This was largely due to their online behaviour and activity, which required faster speeds.

Case study: Mark



Tech
savvy

- 47 years old, project manager
- Goes online for downloading, streaming, gaming, Netflix, social media, emailing
- Speed is his key priority to ensure he can perform all online tasks
- He regularly uses speed checkers and switches provider to ensure he is getting the fastest speed

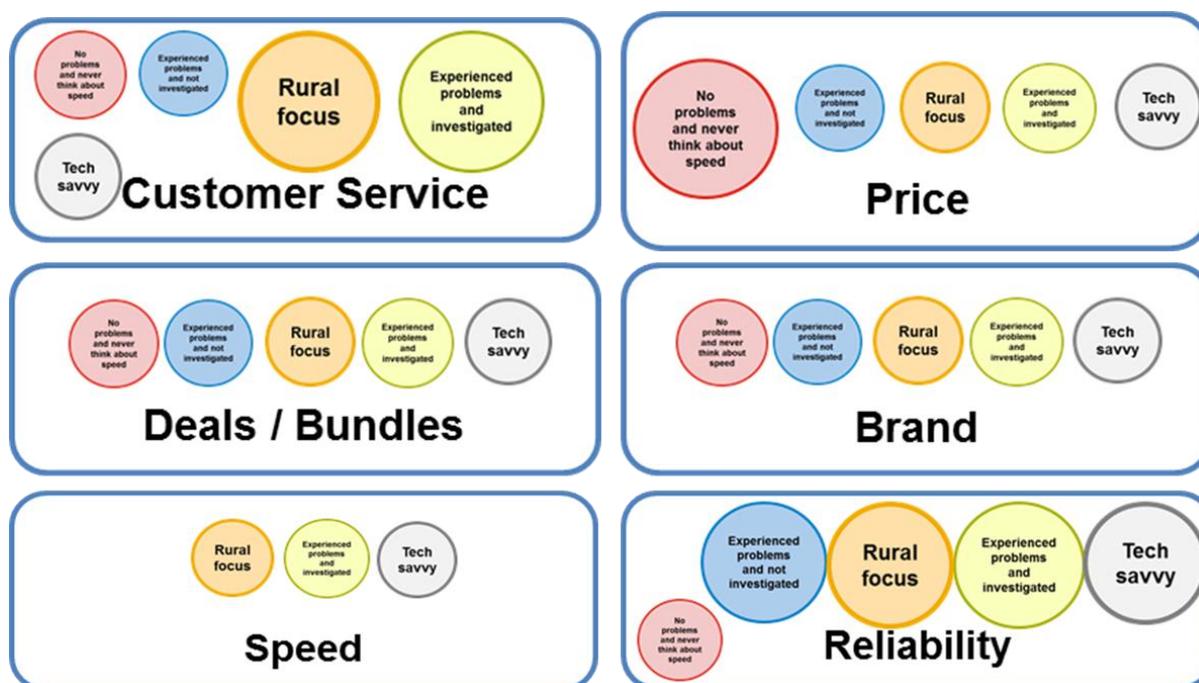
4 Role of speed in broadband decision making

Chapter summary:

- Participants cited a range of factors taken into account during broadband purchase decisions. Customer service and brand were important to all participants, with customer service particularly important for those who had personally contacted customer services for queries and problems recently. Prices, deals and bundles, whilst important to many, were often a key concern for those who tended not to think about speed. Speed and reliability tended to be most important for those with more knowledge and higher levels of usage, particularly those who knew they needed high speeds to carry out their online activities, or those who had experienced problems with low speeds.
- Although varied across typologies, overall levels of knowledge and awareness of broadband speeds was low across participants.
 - Many did not understand what speed they needed to carry out their online tasks.
 - Those with less knowledge did not always understand the difference between speed and reliability.
 - Most participants believed that the higher the number advertised, the higher the speed they were likely to receive. However, they were not clear on what this would mean for them and what speed they would be likely to achieve.
 - Some held the belief that broadband speeds are fairly fixed. They felt that they would receive the same speed regardless of other factors, and were not dependent on the provider.
- Where participants were interested in an advertised broadband product a range of next steps were cited including:
 - Asking friends / family / neighbours for their experiences of the product.
 - Phoning the provider to ask for clarification of the product and terms. Some participants with more knowledge noted that they expected the provider to carry out a personalised speed check.
 - Carrying out online research (e.g. on price comparison or provider websites) to gather more information. This was most often noted by typologies with higher usage and those with typically more knowledge regarding broadband speeds.

4.1 Decision making factors

When discussing broadband purchase decisions, participants cited a range of factors that they take in to account, including speed. The infographic below also illustrates how different typologies prioritised each factor when making broadband purchase decisions; the larger the circle the more important the factor was in making a decision.



Throughout participant discussions, it was clear that some of the factors considered were linked, and sometimes difficult to de-couple when making purchase decisions. The following sub-sections detail their importance and linkages.

4.1.1 Speed and Reliability

Participants with less knowledge regarding speed, particularly those who had ‘no problems and never think about speed’ and who had ‘experienced problems and not investigated’, tended to associate broadband speed with reliability. Lack of knowledge regarding the distinction between speed and reliability meant that these participants often conflated these two issues. Reliability was less of a priority for those who had no problems and never think about speed because their online activity was limited and therefore they were less likely to encounter reliability issues than those whose usage of the internet was higher.

For those with more knowledge regarding broadband speeds - the ‘rural’ focus, ‘experienced problems and investigated’ and the ‘tech savvy’ – speed and, particularly, reliability were factors considered when making broadband purchase decisions. This was due to their high usage, reliance and the types of activities conducted needing faster speeds, therefore they required a faster and reliable service. Those within these three typologies were also more likely to have encountered problems with speed in the past, and this awareness and experience meant that it was more likely to play a role in decision making.

4.1.2 Customer service and Brand

For all participants, customer service and brand did play a role when making purchase decisions. They were usually associated with each other, and a reputable or trusted brand was usually considered to have ‘better’ customer service. Attitudes towards customer service and brand did sometimes affect attitudes towards the adverts tested in the research. For example, some participants spontaneously discussed views towards brands, which sometimes influenced whether they would purchase broadband from them.

However, for those who had experienced problems with speed, particularly the 'rural focus' and 'experienced problems and investigated' typologies, customer service was a key factor when making purchase decisions. This was largely due to the fact that they had experienced problems with speed in the past and had engaged with their providers' customer service to rectify the problem. Due to these experiences, and sometimes the anticipation of experiencing a problem again, customer service was top of mind.

4.1.3 Price and Deals / Bundles

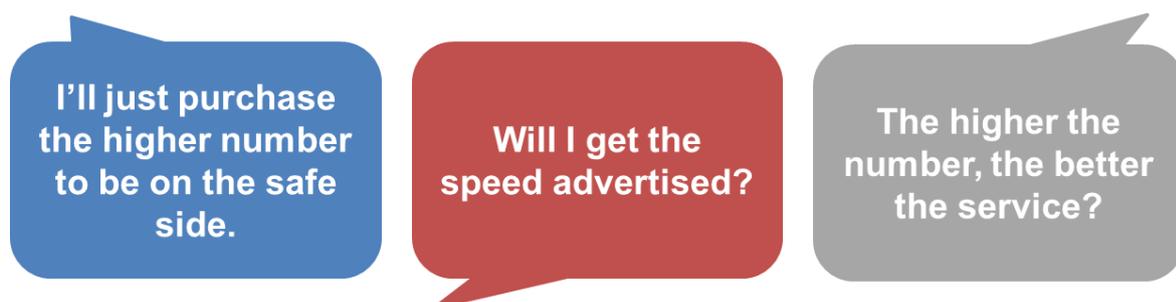
Sometimes, a 'good deal' was associated with the price of broadband, the price of a package deal (TV, broadband and landline), and additional 'extras' included with a package deal. For all typologies, price and deals / bundles was a considering factor when purchasing broadband, particularly for those with 'no problems and who never think about speed', where usually price was the most important factor taken in to consideration. This was usually how they measured whether they were purchasing a 'good deal' or not.

4.2 Spontaneous knowledge and awareness of broadband speed

When participants were discussing broadband speed at a spontaneous level, although there were differing levels of knowledge across the typologies, generally knowledge levels were low in regards to broadband speed and how this translates to conducting real life activities. Therefore, when participants were reviewing the adverts, they found it difficult to ascertain from the speed advertised whether it was appropriate for them according to the online activities they conduct and asked questions such as:



Most participants believed that the higher the number advertised, the higher the speed they would receive. However, they were not clear on what this would mean for them and what speed they would be likely to achieve. Some felt it would be best to 'play it safe' and purchase the highest number advertised as this was likely to be a 'better' speed. They made statements such as:



For some, especially those who live in rural locations, they held the belief that broadband speeds are fairly fixed. Therefore they felt that they would receive the same speed regardless of other factors, and were not dependent on the provider.

“You’re just limited to where you live with coverage and speed...wherever I live; the speed is just what it is.”

Southampton, currently / recently switched or purchased, BC1C2, 20-44 years

4.3 Anticipated next steps when interested in an advertised broadband product

When participants were shown broadband adverts during this research, they were then prompted to discuss what they would do after seeing the advert. Across typologies, the following next steps were cited:

Talk to family/
friends/
neighbours

Phone the
provider

Carry out
online
research

4.3.1 Talk to friends / family / neighbours

For most, they noted that they would talk to friends, family or neighbours about their experiences, and some participants had already done so. Word of mouth was often found to be a trusted and experienced source, and could affect purchase decisions.

4.3.2 Phone the provider

For some, they noted that they would phone the provider for more information or to clarify queries, this was often regarding price and contract length.

“I think my first port of call would be the customer service department, saying is it doable where I live, and if it is, how much is it going to cost me?”

Leicester, considering purchasing / switching, BC1, 60+ years

Particularly for more knowledgeable typologies – such as ‘rural focus’ and ‘experienced problems and investigated’ – participants noted that they would also ask the provider about speed checks, as they felt this would provide personalised information of the speed they would likely receive with that provider. These knowledgeable typologies generally had higher levels of awareness that this useful information could be provided, and this was usually known through personal experience.

However, a small number of participants did cite some concerns they had regarding the expertise and knowledge of the call centre staff, and whether they would be able to provide useful and

accurate information in order to make a purchase decision. Some of these participants had personal experience of this happening to them.

.....
“When you do speak to customer service, a lot of them don’t know what they’re talking about, and if you don’t have any experience yourself you just fall for it.”

Leeds, currently / recently switched or purchased, C1C2D, 45+ years
.....

4.3.3 Carry out online research

Some participants, particularly those from typologies with higher levels of usage and more knowledge such as ‘rural focus’, ‘tech savvy’ and ‘experienced problems and investigated’, said that they would use price comparison websites, provider websites and speed checkers after seeing a broadband advert. Participants noted that they would access these types of sites if they had seen an advert that interested them – this could be in relation to speed, TV bundles or other service or product elements offered by broadband providers. Usually these participants were happy to go away and conduct their own research in order to reach a purchase decision.

.....
“I wouldn’t get broadband or anything without using a price comparison website.”

Aberystwyth, considering purchasing / switching, BC1, 18-29 years
.....

5 Clarity of 'up to' speed claims

Chapter summary:

- Overall levels of knowledge and awareness of broadband speeds was low across participants.
- It was clear that many participants envisaged that the advertised speed – or close to it – would be relevant to the majority of customers.
- Participants with the least level of usage and knowledge about broadband speeds were most likely to assume that they would get the 'up to' speed.
- Others were uncertain about the speed they would receive and were often cautious in estimating what speed they would achieve based on the 'up to' claim.
 - Some expressed skepticism about claims made in advertising (in general).
 - Others noted that they had experienced problems with their broadband speed and anticipated that speeds received would be varied depending on a range of factors.
- However, overall participants struggled to gauge the speed that they would expect to receive themselves at home. Those with more knowledge anticipated that they would not receive the top speed advertised but would achieve close to it.
- Some participants overlooked the phrase 'up to' and only when prompted to consider its inclusion wondered whether it was a marketing caveat to reflect that not all customers would receive the speed advertised.
- Overall once made aware that an 'up to' speed claim advertised a speed that at least 10% of customers could achieve, participants felt that the claim lacked transparency. Because the speed advertised could be applicable to only 10% of customers they felt that based on the claim, they could not determine what speed they were likely to personally achieve.

5.1 Participant interpretation of speed claims

Across the research, participants were encouraged to explain their interpretation of the speed claims shown. This allowed researchers to explore whether speed claims were understood. When interpreting speed claims, participants tended to talk about their reaction in terms of two key criteria:

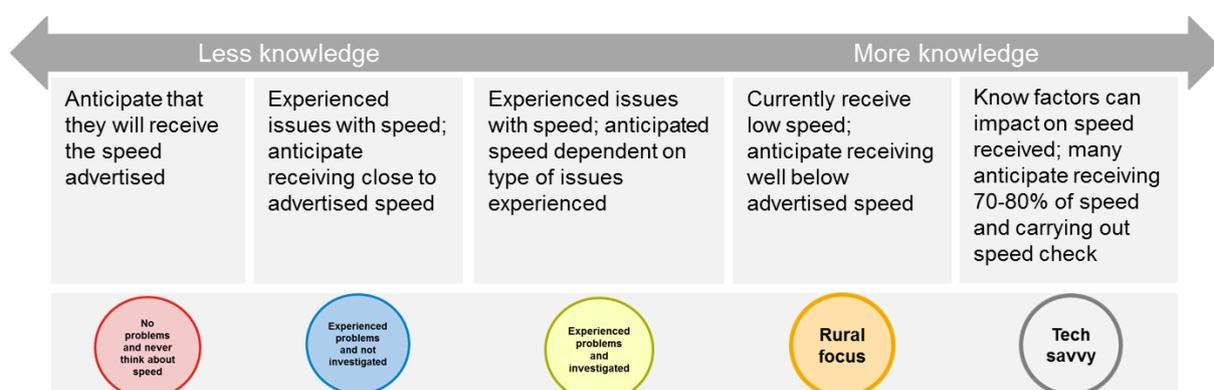
How appealing they found a speed claim: this was based on whether they understood the claim. Lack of contextual understanding of speeds often meant that participants did not understand the claim and therefore were not able to interpret the claim from an informed viewpoint. For example, those with less knowledge about speed simply did not understand what different speeds meant for online activity.

How useful they found the speed claim: this was based on whether participants felt that the speed claim helped them to understand the speed that they could personally expect to achieve. Most participants did not know what speed they currently achieved and there were mixed levels of knowledge regarding the factors that impact speed. Therefore, without further explanation most

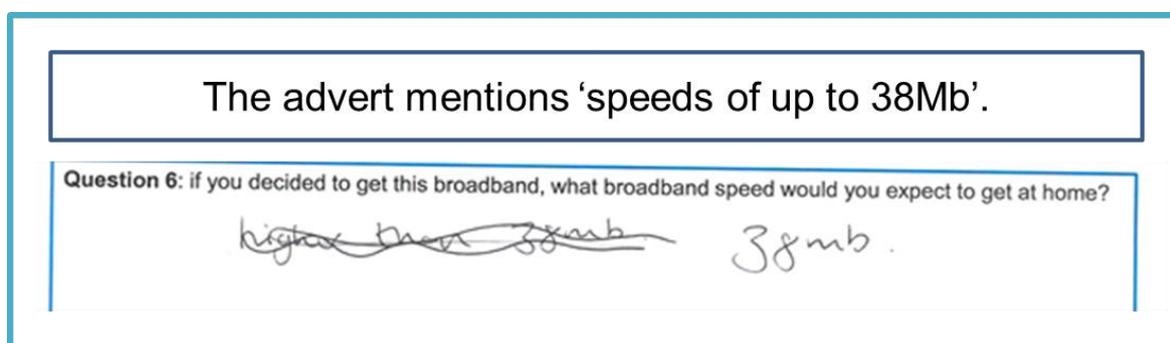
participants assumed that they would receive something close to or the speed claim cited. Even those with more knowledge across the research assumed that they would receive close to the speed advertised. Only those who had multiple experiences with receiving low speeds anticipated that they were not a typical consumer and therefore may not achieve the speed advertised.

5.2 'Up to' speed claims: spontaneous views

Spontaneous interpretation and understanding of the 'up to' speed claims was strongly impacted by levels of participant knowledge regarding broadband speed. The diagram below shows the different types of knowledge held by different typologies and how this shaped their expectations for the speed they would achieve.



When reviewing the 'up to' speed claims some participants assumed that they would receive the 'up to' speed advertised in the advert. This was most likely to be participants who were part of the 'no problems and never think about speed' and 'experienced problems but not investigated typologies'. This suggests that those with the least knowledge about broadband speeds are most likely to assume that they would get the 'up to' speed, rather than that being the maximum speed available only to some people. The image below is a copy of an exercise completed by one of these participants and demonstrates this:



Other participants – from across the other typologies – were uncertain of the speed they might expect to achieve based on the information provided in the adverts. Some simply felt that the speed claim was ambiguous.

.....
 "I think it is very ambiguous. Up to. It could be anything."

Leicester, considering purchasing/ switching, BC1, 60+ years

“It’s alright saying up to. I mean ‘up to 200mbps’. But it might be 1 mbps for someone. It’s not a guarantee.”

Leicester, considering purchasing/ switching, BC1, 60+ years

Other participants expressed uncertainty over the speed they were likely to achieve. For some this uncertainty was based on their skepticism that adverts use marketing ploys and therefore broadband speed adverts were likely to be advertising a speed that not everybody would be able to achieve. Others based their uncertainty on personal knowledge that speeds achieved could be affected by a number of factors e.g. location, peak times and age of equipment.

“They’re not categorically saying you will get that [speed], so they’re not lying through their teeth, but the probability of you getting anywhere near it – you won’t.”

Shrivenham, considering purchasing/ switching, BC1C2, 25-44 years

“The maximum speed you will get, but you’re unlikely to get that. It’s always drastically less than they quote.”

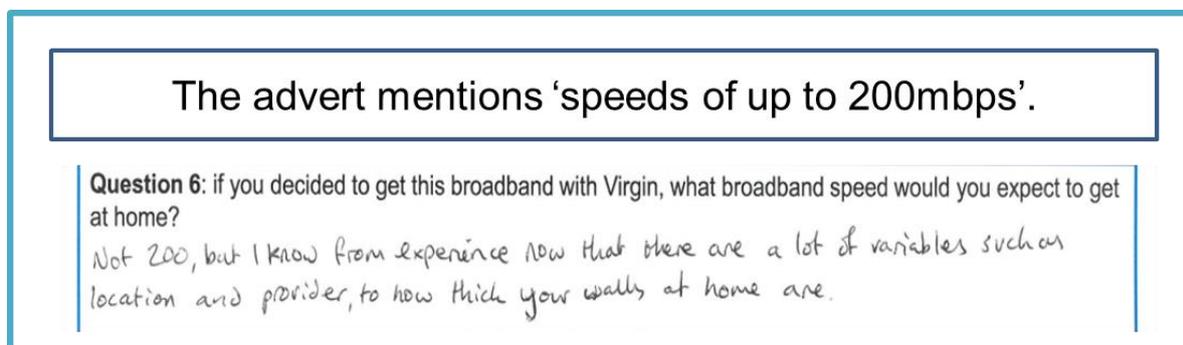
Aberdeen, currently/ recently switched or purchased, BC1C2, 20-44 years

Participants struggled to gauge what speed they would personally expect to receive based on the ‘up to’ speed claim. However, those with more knowledge anticipated that they would not receive the top speed advertised but would achieve close to it – perhaps 70-80% of the advertised speed. It was clear that many participants envisaged that the advertised speed – or close to it – would be relevant to the majority of customers.

“I would expect about two thirds of the speed they are quoting, otherwise it would be false advertising.”

Aberdeen, currently / recently switched or purchased, BC1C2, 20-44 years

The image below is a copy of an exercise completed by one of these participants and demonstrates this:



Those living in rural areas where they had experienced numerous problems with their broadband speed were most likely to interpret speed claims with cynicism and held the perception that the figures advertised were based on speeds achieved in city centres.

“It says up to because if you live in London or Oxford you are going to get that [speed] potentially, but the further out you are, the more it deteriorates.”

Shrivenham, considering purchasing/ switching, BC1C2, 25-44 years

These participants anticipated that they would receive below the advertised speed because this had been their experience of broadband speeds in general. The image below is a copy of an exercise completed by one of these participants and demonstrates this:

The advert mentions ‘speeds of up to 17Mb and speeds of up to 38Mb’.

Question 6: if you decided to get Superfast Sky Fibre broadband with Sky, what broadband speed would you expect to get at home?

Not sure but probably 50-60% of advertised?

The most tech savvy participants reflected that they would always check the speed they could achieve by using a speed checker service. Whilst these participants were interested to know the top speed that could be achieved, they knew that there were a range of factors that impacted on actual speed achieved, so would always seek a personalised speed check. The image below is a copy of an exercise completed by one of these participants and demonstrates this:

The advert mentions ‘speeds of up to 17Mb’

Question 6: if you decided to get this broadband, what broadband speed would you expect to get at home?

Whatever the website that you check tells me for my current location.

Across the research as a whole, many participants noted that they often overlooked the phrase ‘up to’ when looking at the broadband speed adverts.

“I didn’t even read that part [up to]. I just looked at the 38mb.”

Southampton, currently/ recently switched or purchased, BC1C2, 20-44 years

However, when prompted to consider this phrase ‘up to’ in more detail, participants expressed skeptical views about its inclusion. Some felt that the phrase ‘up to’ was a marketing caveat to reflect:

- Poor speeds in rural areas (this was particularly noted in Scotland)

- Differences between peak and off-peak speeds
- Other factors such as age of technology and distance from the exchange (although these were only noted by those with more broadband speed knowledge)

It should be noted that participants generated these views after being prompted to consider why the phrase ‘up to’ is included in the adverts, suggesting that this type of rational interpretation may not be a spontaneous reaction to an advert.

A couple of participants mentioned that they recalled hearing about broadband speed claims via media such as the website www.martinlewis.com. Views formed from these sources were generally negative, with participants recalling that they were surprised at the small number of customers required to achieve the speed in order for it to be advertised.

.....
 “I have a vague [recollection] on a Martin Lewis thing I saw and it is a ridiculously small percentage.”

Leicester, currently/ recently switched or purchased, C1C2D, 20-44 years

5.3 Up to speed claims: informed views

After reviewing and discussing a selection of ‘real’ ads, participants were provided with the following information regarding ‘up to’ speed claims.

This means that at least 10% of customers
 can get the speed advertised

For example: ‘up to 52mb’ means at least
 10% of customers can achieve 52mb

Participants tended to react to information about the speed claim negatively. Some overlooked the phrase ‘at least’ and interpreted the claim as ‘90% of customers do not achieve this speed’.

.....
 “It means that 90% are getting less then, doesn’t it.”

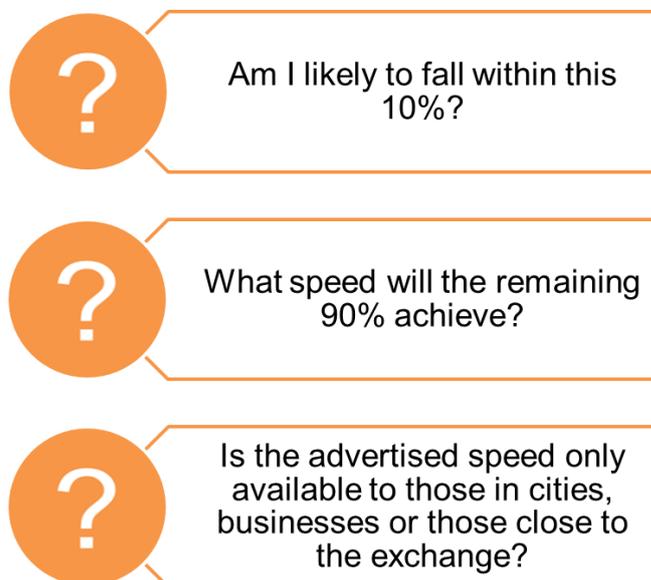
Aberystwyth, considering purchasing/ switching, C1C2D, 25-44 years

Others reacted similarly because they felt that the phrase ‘at least’ was a marketing ploy and although more than 10% of customers could in theory achieve the speed, they anticipated that it would only be 10% of customers who would do so.

.....
 “10% of all UK is shocking.”

Aberdeen, considering purchasing/ switching, C2DE, 45-59 years

Across the research, participants raised queries regarding the claim as shown in the diagram below.



Overall participants felt that the claim lacked transparency because the number could be applicable to only 10% of customers. Some felt that this was dishonest.

.....
 "10%...I am thinking a token gesture..."

...But to me, that is false advertising."

Leicester, currently/ recently switched or purchased, C1C2D, 20-44 years

"I'm surprised that that has not been regulated to a higher number."

Leicester, currently/ recently switched or purchased, C1C2D, 20-44 years

.....
 Others noted that by providing a speed that could be applicable to only 10% of customers, it was difficult to identify what type of speed you might expect to achieve.

.....
 "It's not actually telling you anything then, is it really?"

Leicester, currently/ recently switched or purchased, C1C2D, 20-44 years

"The fact that only 10% of customers are going to get the speeds advertised – I just wouldn't go with that provider."

Aberystwyth, considering purchasing/ switching, C1C2D, 25-44 years

.....
 Participants were pessimistic that they would be part of the 10% of customers achieving the advertised speed. Some felt that the speed would only be achieved by those living in cities or near to the telephone exchange. This generated further skepticism that broadband suppliers were not providing realistic speeds for rural customers.

.....
 "It should be something that is a lot more representative, not just London."

Shrivenham, considering purchasing/ switching, BC1C2, 25-44 years

“That 10% might be the houses round the exchange. It’s not exactly a figure to be proud of.”

Aberdeen, currently/ recently switched or purchased, BC1C2, 20-44 years

It should be noted that the strength of negative reaction towards the ‘up to’ speed claim was strongest in research sessions where participants saw this speed claim first. In sessions where participants saw other speed claims before the ‘up to’ speed claim, reaction was still negative but not as vociferous as in other sessions. This suggests that:

- Participants had already had opportunity to express skepticism about advertising in general or problems they had experienced with their broadband speed earlier in the discussion so this was not such a strong influence when reviewing the ‘up to’ speed claim.
- Participants had already had opportunity to engage further in the topic, building their awareness of speeds and consider the factors that can impact on speeds achieved, enabling them to interpret the ‘up to’ speed claim from a more informed viewpoint.

6 Alternative speed claims

Chapter summary:

- Reactions to the alternatives tested were driven by participants' understanding of broadband speed and factors that can impact on the speed achieved.
- Although a range of alternative speed claims were tested, none enabled participants to determine what speed they were likely to personally achieve.
- Across the research, participants felt that a tailored speed claim (for example, accessed via an online speed checker) would provide the clearest understanding of the type of speed they would be personally likely to achieve.

6.1 Reaction to alternative speed claims

Across the research four alternative speed claims were shown to participants. These fell into four groupings:



For each alternative, participants were presented with ADSL¹⁰, FTTC¹¹ and cable¹² examples.

6.2 'Up to' alternatives

Two 'up to' alternatives were tested in the research.

6.2.1 Providing an explanation of 'up to' within the advert

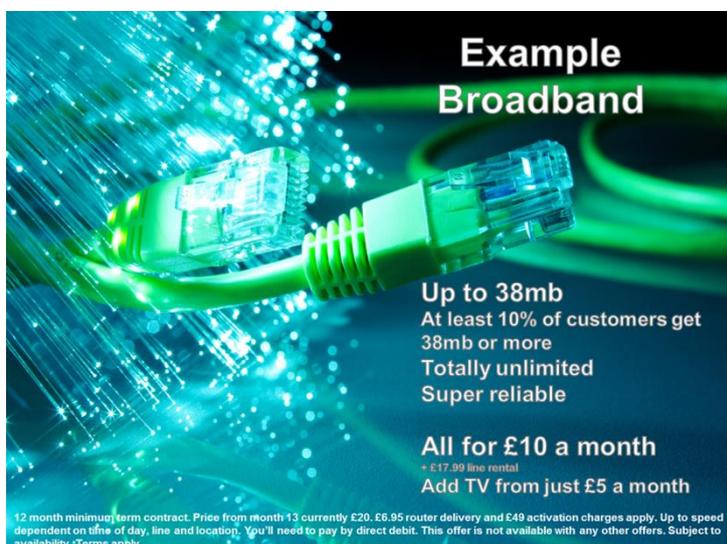
→ This alternative was tested in stages 2 and 3 of the research. An example of the stimulus used to test this alternative is shown below¹³.

¹⁰ Asymmetric Digital Subscriber Line is carried over a national fibre optic network to local exchanges and the traditional copper-wire telephone network delivers the broadband signal from the exchange to the end user.

¹¹ Fibre-to-the-cabinet is carried over a national fibre optic network to local telephone exchanges. Then fibre optic cable delivers the service from the local exchange to the cabinet serving a neighbourhood. The traditional copper-wire telephone network then delivers the service from the cabinet to the end user.

¹² Cable is carried over a national fibre optic network to local telephone exchanges. Fibre optic cable delivers the service from the local exchange to the cabinet serving a neighbourhood, but co-axial cable then delivers the service from the cabinet to the end user.

¹³ All figures included in the mock ups are indicative only and do not represent the speeds consumers can achieve with a particular provider. Pricing claims in the ads reflect the way providers typically promoted their prices at the time the fieldwork was conducted (for example, line rental is displayed separately to the cost of the broadband element).



When reviewing this alternative, participants echoed concerns that an ‘up to’ claim could be applicable to only 10% of customers. As described in chapter 5, they felt pessimistic that they would be part of the 10% able to achieve the advertised speed, and therefore did not feel that the information was useful in determining what speed they might expect to achieve.

“It tells you you’re going to get less than that...it sounds better but leaves a lot of doubt...it’s not realistic that you’re gonna (sic) be in that 10%.”

Aberystwyth, considering purchasing/ switching, BC1, 18-29 years

However, participants agreed that including the explanation in the advert was more transparent and honest. In this respect participants felt that they better understood the context of the claim (i.e. relevant to at least 10% of customers) but still felt that it did not help them understand the speed they personally would be likely to achieve.

“That was a bit more honest, because you’d assume that you wouldn’t get that speed.”

Aberystwyth, considering purchasing/ switching, C1C2D, 25-44 years

Despite the fact that many felt that inclusion of the explanation was a more honest approach to take, more marketing savvy participants also agreed that it was a less attractive statement. Some queried whether they would be likely to look into the broadband offer if the advert specified that the speed advertised could only be achieved by 10% of customers.

“It is honest, but it wouldn’t grab me as a customer.”

Southampton, currently/ recently switched or purchased, BC1C2, 20-44 years

Some participants noted that consumers were likely to be cynical about achieving the speed advertised and that inclusion of the explanation whilst more transparent, would confirm and reinforce this cynicism.

.....
 "I think it would confirm consumer's suspicions if it said at least 10%"

Shrivenham, considering purchasing/ switching, BC1C2, 25-44 years

6.2.2 Change the up to claim to be applicable to at least 25% of customers or 50% of customers

→ This was tested in stage 1 of the research. An example of the stimulus used to test this alternative is shown below.

The advertised 'up to' speed should be available to at least 50% of customers

For example, 'up to 25mb' would mean that at least 50% of customers can achieve this speed.

Whilst participants agreed that it was more useful to know the speed that at least 25% or 50% of customers could achieve when compared to 10% of customers, views were still largely negative. Participants reflected that even at 50%, the speed claim was not relevant to a majority of customers which meant that it was still difficult to gauge the type of speed they might expect to achieve.

.....
 "I still don't like 'up to'. They could give you literally any amount."

Aberystwyth, considering purchasing/ switching, BC1, 18-29 years

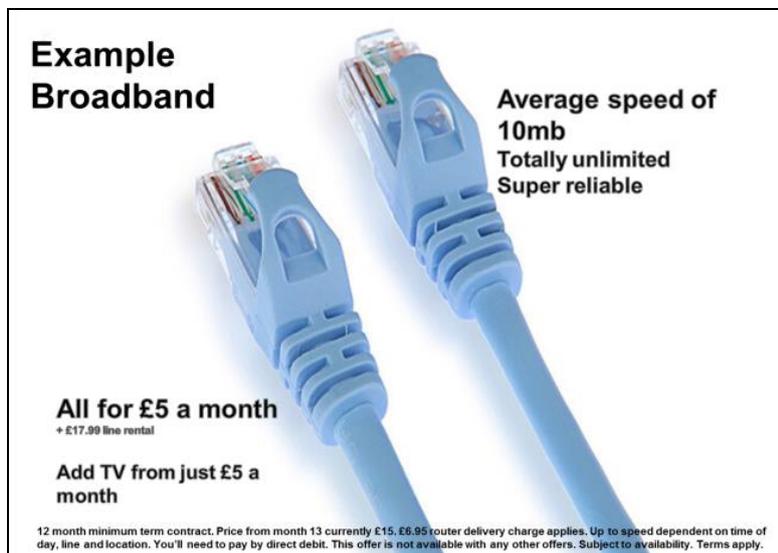
6.3 Average

Three average speed claim alternatives were tested in the research.

6.3.1 Average speed

→ This alternative was tested in stages 1 and 2 of the research.

An example of the stimulus used to test this alternative is shown below.



Example Broadband

Average speed of 10mb
Totally unlimited
Super reliable

All for £5 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Overall, average speed claims received mixed responses. Some participants were positive towards this type of claim as they felt it gave an indication of the speed that most customers would receive. Especially when compared to up to speed claims, some felt that an average provided a figure that more people were likely to achieve.

“Average suggests that you could be part of that...it’s more inclusive...10% is quite exclusive.”

Southampton, currently/ recently switched or purchased, BC1C2, 20-44 years

“If you’ve got an average you will be much more confident that you are likely to get something around that.”

Shrivenham, considering purchasing/ switching, BC1C2, 25-44 years

These participants tended to interpret average speed claims as ‘50% of customers will achieve above the average’. Some participants in rural areas reflected that the average must be based on all customers and therefore were reassured that the average would include both customers in areas with higher speeds, and customers in more rural areas (such as themselves) who typically received lower speeds.

Negative comments regarding average speed claims often focused on queries that arose when participants began to think about what the average meant, and how it had been calculated. The following queries were cited by participants across the research:

- How is the average calculated?
- Does the average figure take into account both peak and off-peak times? More tech savvy participants suggested that any average figures should do this.
- Is it a UK-wide average or a local average?
- Does it include domestic and business customers?
- Is it an average for me or an average across customers?

After considering these types of queries, some participants concluded that average speed claims were too vague. Some participants suggested that detail about how the average had been

calculated could be included in the small print but overall this suggestion was not met with much support. Many felt that information in small print would be overlooked, and the fact that an average needed to be explained suggested that an average was not clear or simple enough for an advert.

There was also a degree of skepticism amongst some participants that an average number lacked detail regarding minimum speeds that could be achieved.

.....
 "It's hard to know if they're being truthful because they can just say sorry, yours is below average."

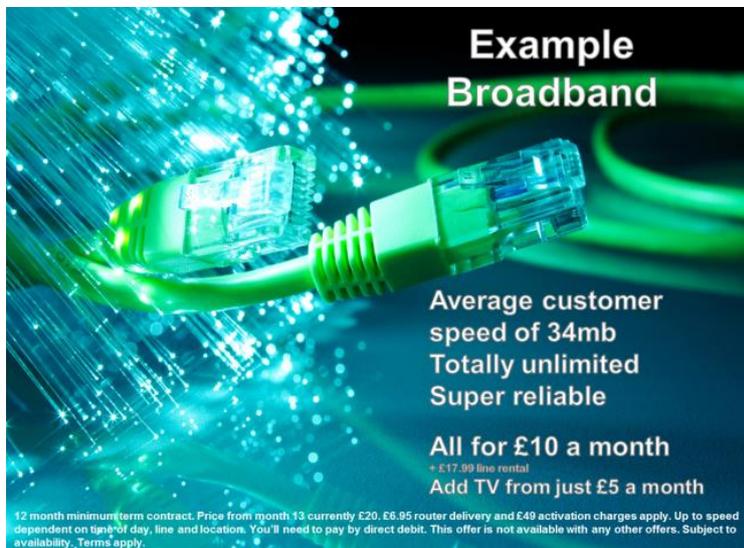
Aberystwyth, considering purchasing/ switching, BC1, 18-29 years

"Average means median, meaning one person might be getting 1mb and another might get 200mb. It's just not acceptable advertising. If I was the one getting 1mb I wouldn't be happy."

.....
 Leeds, currently/ recently switched or purchased, C1C2D, 45+ years

6.3.2 Average customer speed

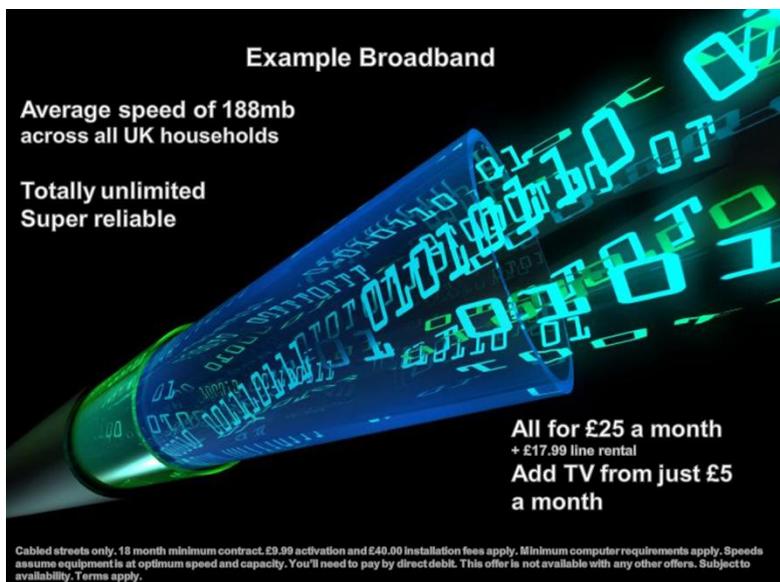
→ This alternative was tested in stage 2 of the research. The word 'customer' was added at this stage in response to participant uncertainty about what average referred to. For example, was it the average speed customers received during the course of a day. An example of the stimulus used to test this alternative is shown below.



Overall, this word did not clarify this point for participants. In some cases, inclusion of the word 'customer' resulted in more participants then querying which types of customers were reflected in the average shown.

6.3.3 Average speed across all UK households

→ This alternative was tested in stage 3 of the research. An example of the stimulus used to test this alternative is shown below.



Example Broadband

**Average speed of 188mb
across all UK households**

**Totally unlimited
Super reliable**

**All for £25 a month
+ £17.99 line rental
Add TV from just £5
a month**

Cabled streets only. 18 month minimum contract. £9.99 activation and £40.00 installation fees apply. Minimum computer requirements apply. Speeds assume equipment is at optimum speed and capacity. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

To further clarify the basis for the average calculation, inclusion of the phrase ‘across all UK households’ was added to the average alternative speed claim in stage 3 of the research. Participants noted that this information was useful in clarifying that the average figure was based across the UK and not a local figure. However, this prompted participants to suggest that a local figure would be more useful in helping them determine what type of speed they would be likely to achieve at home. This was most strongly voiced by those living in rural areas, and echoed other views from rural participants heard across the research as a whole.

“It doesn’t say anything about my area...which is probably not very good at all...average wouldn’t mean anything to me.”

Aberystwyth, considering purchasing/ switching, C1C2D, 25-44 years

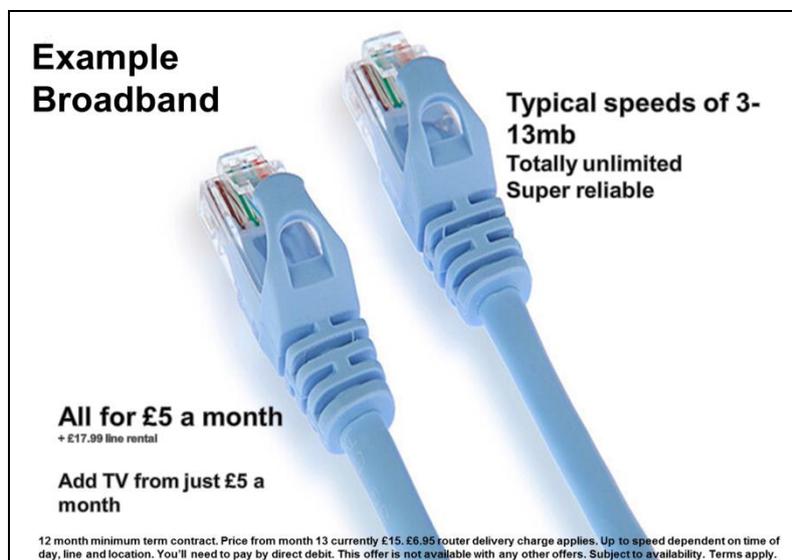
6.4 Range

Three range speed claim alternatives were tested in the research. These were expressed as ‘typical speed’ ranges.

6.4.1 Typical speeds

→ This alternative was tested in stages 1 and 2 of the research

An example of the stimulus used to test this alternative is shown below.



Example Broadband

Typical speeds of 3-13mb
Totally unlimited
Super reliable

All for £5 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Once participants had been shown the stimulus and had discussed their expectations of speeds achieved based on the claim, they were provided with information that typical speeds were based on speeds that could be achieved by 80% of customers.

Views regarding range speed claims were also mixed across the research. Range information was particularly useful for those who felt that they could best determine the speed they would achieve by knowing what the majority of customers would achieve. Most participants felt optimistic that they would fall within the typical range. They felt that this would help manage their expectations.

.....

“The range information is good because it manages your expectations.”

Aberystwyth, considering purchasing/ switching, BC1, 18-29 years

.....

Those with more knowledge regarding factors that could impact on speeds achieved had mixed views towards range claims. Some anticipated that they would use this knowledge to help them determine where within the range they would be likely to fall. However others felt that the range information was too broad and based on their experience knew that there were factors that would impact on speed achieved, but were unsure what this meant for where within the range they would fall. These participants were most likely to comment that they felt they were not a ‘typical’ customer and therefore felt that a more tailored or local speed would be more useful.

.....

“I don’t like the range...you don’t know where you’re going to fall as a customer.”

Southampton, current/ recently switched or purchased, BC1C2, 20-44 years

“It’s okay for the average customer who has got decent equipment but if you’re not a typical user then...there is too much ambiguity.”

Leeds, currently/ recently switched or purchased, C1C2D, 45+ years

.....

Overall, some participants tended to overlook the word ‘typical’ when they read the range speed claim. This meant that some interpreted the range to be maximum and minimum achievable speeds. When prompted to consider inclusion of the word ‘typical’ participants assumed that this

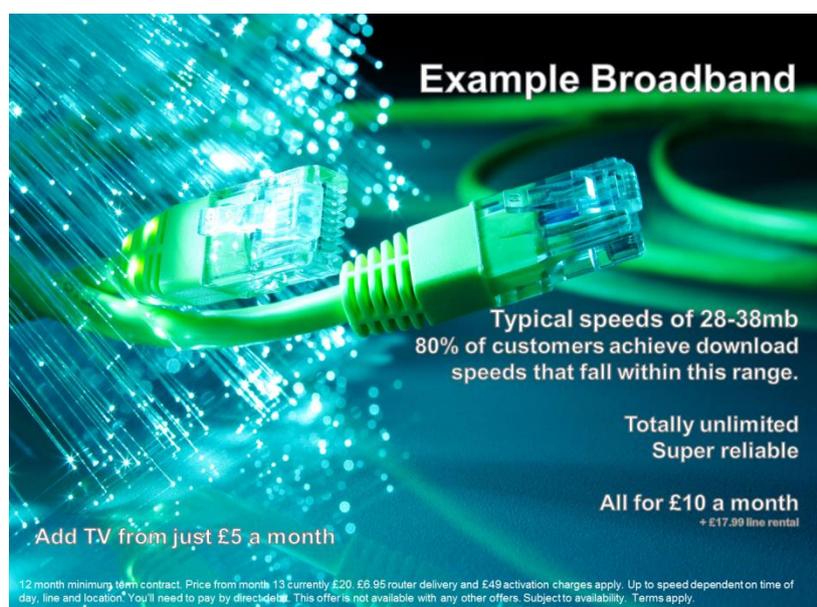
meant that the remaining 20% of customers would achieve a speed below the range stated. A few participants expressed skeptical views towards the word 'typical' feeling that it was a way for suppliers to make the speed claim vague.

.....
 "How do they define typical? It's a fudge word."

.....
 Southampton, considering purchasing/ switching, C2DE, 60+ years

6.4.2 Typical speeds; 80% of customers achieve download speeds that fall within this range

→ This alternative was tested in stage 3 of the research. An example of the stimulus used to test this alternative is shown below.



Given the positive reaction to information that ranges referred to a speed that 80% of customers achieved, this information was included as part of a range speed claim in stage 3 of the research. Participants reinforced positive views towards inclusion of this information. Some noted that it was more encouraging to be given speed information about 80% of customers noting that when compared to up to speed claims, knowing about 80% of customers, rather than 10% of customers was both more useful and a more positive way of presenting broadband speeds.

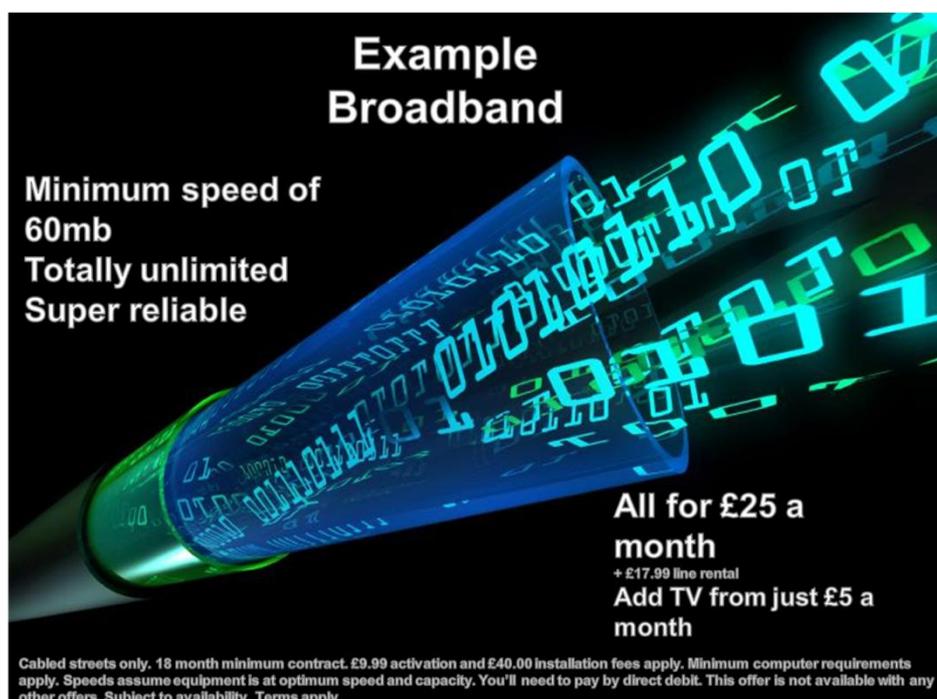
.....
 "I like that it says 80% of customers rather than 10%. It gives a more positive feel to it."

.....
 Shrivenham, considering purchasing/ switching, BC1C2, 24-44 years

6.5 Minimum

One minimum speed claim was tested across stages 2 and 3 of the research

An example of the stimulus used to test this alternative is shown below.



Many research participants found the minimum speed claim useful and appealing. For many the appeal focused on the simplicity and transparency of the speed claim.

.....
 "It's more honest isn't it, and honesty is better."

Aberystwyth, considering purchasing/ switching, C1C2D, 25-44 years

"If they [broadband provider] went with minimum that would be impressive, you've got guarantees."

Aberdeen, currently/ recently switched or purchased, BC1C2, 20-44 years

.....
 Participants anticipated that customers would never achieve a speed below the speed specified and for that reason felt that the claim constituted a 'guarantee'. This was appealing in itself, especially amongst those who were more skeptical regarding claims made in advertising.

.....
 "Without the commitment of a minimum speed you can never go back to the company and say I'm not getting the guaranteed speed."

Leeds, currently/ recently switched or purchased, C1C2D, 45+ years

"With average you don't know if it's going to be higher or lower and if you're happy with the minimum speed then at least you know what you're going to get."

Aberystwyth, considering purchasing/ switching, BC1, 18-29 years

.....
 Some participants – typically those with less knowledge – felt that a minimum speed was enough information to provide customers with. These participants noted that with a minimum they could be

certain of the minimum speed they would achieve, and if they received above this, it would be a 'bonus'.

"I would expect to get this speed as minimum. If you got higher it's marvelous."

Leeds, currently/ recently switched or purchased, C1C2D, 45+ years

"Anything over that, you've exceeded expectations."

Southampton, currently/ recently switched or purchased, BC1C2, 20-44 years

However some participants were unsure whether minimum was enough information. Those with more knowledge reflected that they were also keen to know about maximum or top speeds that could be achieved. These participants were often purchasing broadband on the basis of this type of information and therefore felt that it was useful to also include this type of information.

A few more knowledgeable participants further noted that although a minimum speed was transparent, it was not attractive as for some services (e.g. ADSL), the speed advertising would look very low.

"It's clear, but it doesn't sell very well."

Aberdeen, currently/ recently switched or purchased, BC1C2, 20-44 years

These participants queried whether they would even pay attention to an advert presenting a very low speed and concluded that they would be unlikely to look into the advertised product as it lacked appeal. This was particularly the case for ADSL services. Whilst those with less broadband speed knowledge were less likely to spontaneously know that these speed claims were low, when they compared minimum speeds across ADSL, FTTC and cable services, they agreed that ADSL minimum speeds seemed low, and less appealing compared to the other minimum figures.

7 Role of additional information

Chapter summary:

- Participants were very positive to the inclusion of signposting to a speed checker in broadband adverts. Whilst typologies with more broadband speed knowledge were most likely to note that they would do this anyway, they thought that a prompt would be useful. Those who had 'experienced problems and not investigated' found this information useful and were often keen to learn more about the broadband services they did / could receive.
- Information about download speeds was considered most useful for those who regularly carried out this type of online activity and therefore were able to interpret this information. However, there was some appetite for broader information regarding the speed required to carry out different online tasks; some participants mentioned that this type of information could help build their knowledge and understanding of broadband speeds. However, it was agreed that this type of information would be too detailed for an advert.
- Information of factors that could affect broadband speed was driven by personal experience and knowledge. Because this type of information was often included in advert small print, participants were often skeptical towards it. However, there was appetite amongst some to learn more about these factors, and participants agreed that this information could usefully be provided as part of an online speed checker.
- Participants with more knowledge and those who had experienced problems with their broadband were interested to learn about the types of technology available. Some already knew this information and agreed that it was useful. However, participants agreed that this information was too detailed to include in an advert but could be provided as part of an online speed checker.
- Use of comparisons within and across broadband provider services in adverts often resulted in confusion. This was particularly the case where speed was grouped with other factors (e.g. download limits and price).
- Participants did not think that the adverts shown in the research provided local speed information. Whilst some felt that this would be a useful to have, they did not expect this degree of local information from national providers. However, those living in more rural areas, and Scotland did feel that local information would be useful in helping them determine what speed they would be likely to achieve. This was particularly the case for those who felt that their local area received lower speeds compared to the rest of the country.

7.1 Including additional information

The research explored the usefulness of including additional information relating to speed on broadband adverts.

7.2 Signposting to a speed checker

Overall, signposting to a speed checker was positively received amongst most participants and was considered to be useful in obtaining personalised information regarding the broadband speed they would likely receive.

“It doesn’t matter what anybody else gets, it is what you are going to get.”

Leicester, currently / recently switched or purchased, C1C2D, 20-44 years

“It gives you the opportunity to see if their service is suitable in the area you live in.”

Leeds, currently / recently switched or purchased, C1C2D, 45+ years

For most participants, there was a preference for the speed checker website to be independent and not endorsed by providers. This ensured confidence in the information and that it would be trusted to be impartial.

For some – particularly the ‘tech savvy’, ‘rural focus’ and ‘experienced problems and investigated’ – they had knowledge and experience of using speed checkers, and it would be something that they would likely use in the future. Some also knew that providers use speed checkers as part of the switching process; again this was usually through personal experience.

“I think everyone is a bit skeptical of advertising nowadays and people will go off and check it out for themselves.”

Shrivenham, considering purchasing / switching, BC1C”, 25-44 years

For others – particularly those who ‘experienced problems and had not investigated’ – the signposting to a speed checker on an advert would act as a prompt to consider using one, and they were receptive to the idea of obtaining more tailored speed information. This typology was usually keen on building their knowledge relating to their broadband speed, and there was high appeal to learn about the speeds they could receive.

However, some – particularly those with ‘no problems and never think about speed’ – were unlikely to consider using a speed checker. This was largely due to the fact that speed remained a lower priority for them when making a purchase decision, particularly when compared to price, and they were only likely to consider using a speed checker if they experienced speed-related problems.

Overall, many participants concluded that signposting to a speed checker should be a key inclusion for broadband speed adverts. For most, it was felt to act as a prompt to find out more personalised information regarding speed, which most felt would be particularly useful to know when switching / considering switching.

“They should write ‘give us a call and we’ll tell you what you can receive for your area’.”

Southampton, currently / recently switched or purchased, BC1C2, 20-44 years

“Perhaps they ought to advertise on a question basis – have you queried your speed recently?”

Leicester, considering purchasing / switching, BC1, 60+ years

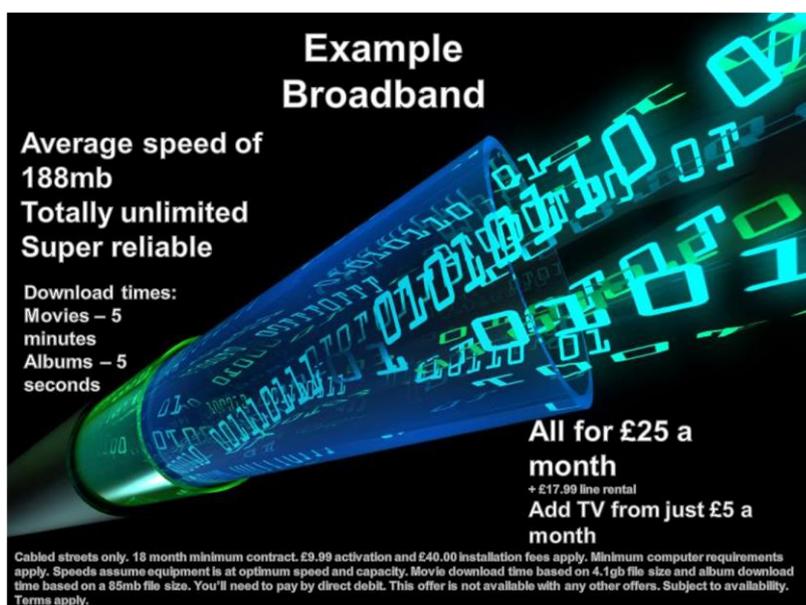
“The speed is dependent on your location, so ring us or visit this site to find out your speed.”

Leeds, currently / recently switched or purchased, C1C2D, 45+ years

Some participants noted that signposting to a speed checker could be a way to inform people that there will be a variance in the broadband speed advertised, and therefore manage expectations in terms of what the individual will personally receive.

7.3 Download times

Download times was tested in stage 2 of the research. An example of the stimulus used to test this alternative is shown below.



Example Broadband

Average speed of
188mb
Totally unlimited
Super reliable

Download times:
Movies – 5
minutes
Albums – 5
seconds

All for **£25 a month**
+ £17.99 line rental
Add TV from just **£5 a month**

Cabled streets only. 18 month minimum contract. £9.99 activation and £40.00 installation fees apply. Minimum computer requirements apply. Speeds assume equipment is at optimum speed and capacity. Movie download time based on 4.1gb file size and album download time based on a 85mb file size. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Overall, download speeds were only useful for those who currently download online content and have existing awareness of download times. For these participants, it was particularly useful to see download speeds from different providers to allow for comparisons and determine whether the speed advertised was 'good' or 'fast'.

"It gives you some context, because I actually do those things."

Aberystwyth, considering purchasing / switching, C1C2D, 25-44 years

"You can kind of think in your mind how long a song is, and how long it will take to download, so it's like a guide."

Aberystwyth, considering purchasing / switching, BC1, 18-29 years

However, the provision of download speeds sometimes caused participants to query the information - e.g. what is the film length or quality being downloaded? These queries sometimes negated the benefit of this information.

Some considered that download speed information could be useful, particularly in supporting those with limited knowledge, as it could promote awareness of speed and what speed they would need to conduct online tasks. These participants felt that download speeds regarding more 'ordinary' online

tasks such as sending an email or uploading to Facebook, would be seen as more relevant to them. However, for those with low levels of usage, limited interest in speed and have not experienced problems, download speed information was not seen as relevant or useful to them.

.....
 "I think that is more for your geeks, people who are probably aware of those figures."

.....
 Leicester, currently / recently switched or purchased, C1C2D, 20-44 years

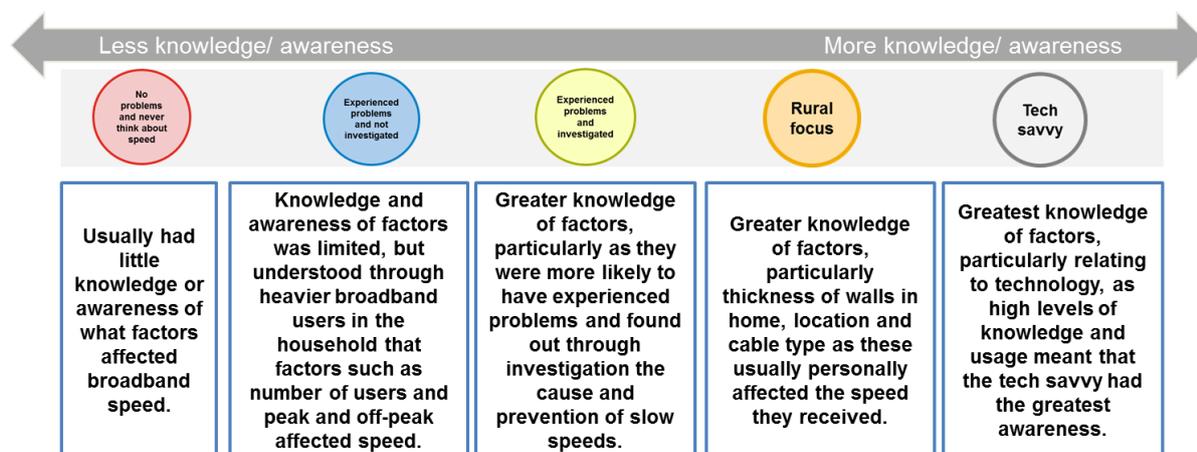
Overall, download speed information was useful to some as they could apply speed to real life activities in current adverts, which sometimes provided a greater indication of the speed that would be most suited to their needs. However, some suggested that this type of detail could be made available separately, such as speed checker websites, as not all participants expected the inclusion of such detailed information on an advert.

7.4 Factors that can affect speed

Across the research, a range of factors that can affect your speed were spontaneously mentioned by participants and included:



Knowledge and awareness of these factors was mixed depending on personal experience and tech savviness. The infographic below details how this was split across typologies:



When testing the provision of further information in broadband adverts, some participants expressed skepticism, particularly when it was provided in the small print. These participants felt that the

provider was trying to 'hide' the information or trying to 'trick' the consumer. This was particularly the case when adverts provided information detailing that speed could be affected by the age of computer equipment.

.....
 "I wouldn't understand that because I wouldn't know anything about my computer equipment."

Leeds, currently / recently switched or purchased, C1C2D, 45+ years

"They're passing the buck as well, saying that if your computer isn't good enough your internet won't be as fast, do it's a gateway for them to blame your equipment."

Aberystwyth, considering purchasing / switching, C1C2D, 25-44 years

Skepticism was also cited with regards to further information in advert small print detailing that speed may depend on time of day, line or location.

.....
 "It is essentially a get out clause and it's not clear to the customer at all."

Leeds, currently / recently switched or purchased, C1C2D, 45+ years

However, there was some appetite amongst participants to learn more about factors that can affect speed, but many agreed that this information could be provided elsewhere, such as a speed checker website or the provider asking / providing this level of information during the switching process.

.....
 "When I spoke to [provider] he asked me how many and what types of computer / mobiles in home and what used for."

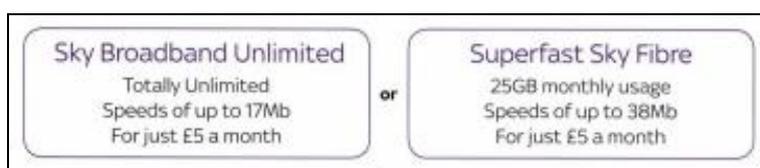
Leeds, currently / recently switched or purchased, C1C2D, 45+ years

"Maybe it's something you can tell them [provider] before they sign up to it."

Southampton, currently / recently switched or purchased, BC1C2, 20-44 years

7.5 Comparisons

The research tested current broadband advertising that provided comparisons across different providers and across different broadband products with the same provider. Whilst these speed comparisons enabled participants with lower levels of knowledge (compared to other participants) to build their understanding of the range of speeds available, these comparisons often resulted in confusion.



When comparing different broadband products with the same provider, many participants found it difficult to unpick the offering and calculate whether it was a 'good deal'. Words such as 'unlimited' and 'superfast' often clouded understanding of speed for many, with some participants interpreting

that 'unlimited' referred to the speed advertised. The presentation of this grouping usually resulted in participants focusing on the price and/or download limits.



When comparing different broadband providers, many participants found the imagery of speed dials confusing for the following reasons;

- Some assumed that if they purchased the higher advertised speed of 52 mb, they would be guaranteed to receive no lower than the slower speed advertised of 38mb
- Others noted that the phrase 'as standard' used on the advert suggested that customers would receive the advertised speed as the minimum
- A small number of participants likened the imagery of speed dials to those used on some speed checker websites. They sometimes interpreted the advert to mean that a speed check had been carried out, and therefore the speed advertised would be achievable / accurate

7.6 Local information

Overall, most participants did not think the adverts tested in the research currently provided information regarding locally-achieved broadband speeds.

.....
 "It invites the customer to make a decision based on vague figures. You need to say for accurate figures of what your speed may be visit our site and check your speed."

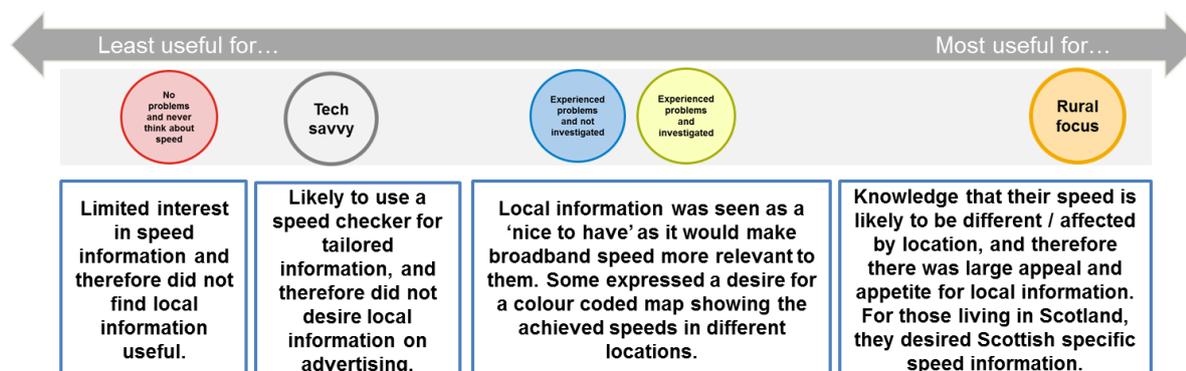
Leeds, currently / recently switched or purchased, C1C2D, 45+ years

.....
 Whilst participants tended to agree that this would be helpful in communicating the types of speed they could personally expect to achieve, some reflected that they would not expect companies to provide this level of detail, and were happy to research more information regarding speeds they would likely achieve.

.....
 "I wouldn't expect to see a local speed in the local paper, it would just be generic. Most advertising is based in a city centre location in the best possible circumstances and that's where it becomes misleading for the average user."

Leeds, currently / recently switched or purchased, C1C2D, 45+ years

.....
 The below infographic details the level of appeal and perceived usefulness of local speed information across the five typologies;



.....

"England always gets everything better than us [Scotland]."

Aberdeen, considering purchasing / switching, C2DE, 45-59 years

.....

8 Conclusions

8.1 Clarity and interpretation of 'up to' speed claims

Overall, the interpretation of 'up to' speed claims is strongly influenced by levels of knowledge.

Although varied across typologies, overall levels of knowledge and awareness of broadband speeds was low across participants.

It was clear that many participants envisaged that the advertised speed – or close to it – would be relevant to the majority of customers.

Those with less speed knowledge believe they will receive the speed advertised. Those with more broadband speed knowledge understand that there are factors that can impact on speeds achieved but typically anticipate that they will achieve a speed close to the speed advertised.

There is negative reaction to the explanation of the 'up to' speed claim. The claim is not considered to be transparent and not useful in helping people determine what speed they might expect to achieve.

8.2 Useful information and speed claims

It is clear that speed claims need to be relevant to consumers, helping to manage their expectations regarding the speed they can personally expect to achieve. With this in mind there is strong appeal for adverts to signpost to an independent online speed checker as a way to provide a tailored speed check. There is also appetite for further information regarding factors that affect speed to be included as part of this website.

Preferences by typology:

8.2.1 No problems and never think about speed

This typology typically find **minimum** speed claims more useful in helping them understand what speed they are likely to achieve. This is based on the perceived simplicity and transparency of this claim. There is strong appeal for being certain of the speed that can be achieved even though this typology is unlikely to understand what speed means for online activity.

"I think it's about the company being honest...you know what you're going to get as a baseline, you know what you can get up to and you know the average."

Southampton, currently/ recently switched or purchased, BC1C2, 20-44 years

This typology is least interested in learning more or being provided with information about speed simply because they do not experience any problems.

8.2.2 Experienced problems and not investigated

Transparent and simple **minimum** speed claims are also considered useful for participants falling under this typology, who find this claim easy to understand. Whilst there are low levels of knowledge regarding speed, and what speed means for online activity, problems experienced mean that there is appetite for more information. There is a clear positive reaction to signposting to more information and a speed checker. Some also find **range** speed claims useful. This is particularly

those who are more engaged in the topic, and feel that it is useful to understand the speed that the majority of customers achieve to help them understand what type of speed they might achieve.

8.2.3 Experienced problems and investigated

Whilst there is still positive reaction to **minimum** speed claims, this typology is keen for further information. They find **range** speed claims useful as they are keen to know more about what speed the majority of customers can achieve, and are optimistic that they will be part of the 80% of customers who achieve this. Some already know about and use speed checkers but there is strong appetite for signposting to this in adverts.

“Your typical [speed] and then again, then you can go online to do a check.”

Leicester, currently/ recently switched or purchased, C1C2D, 20-44 years

8.2.4 Rural focus

This typology is often keen to see the **minimum** speed claim as they have experienced problems with speed and are aware that their location receives lower speeds to other places across the country. Some are also keen for broader information about the speeds that the majority of customers receive, expressing interest in **range** speed claims. However, most anticipate that their location will be a key driver of the speed they can achieve and therefore often feel that local speed information would be most useful to manage expectations of what speed they might personally achieve. This typology is highly likely to agree that getting a personalised speed check is an important part of the broadband decision making process.

8.2.5 Tech savvy

This typology express mixed preferences for **minimum**, **range** and **average** speed claims; they reflect that one of these would be useful but alongside this are keen to know the **maximum** or **top** speed available.

“The high speed average would draw you in, but the guaranteed 60mb would reassure you.”

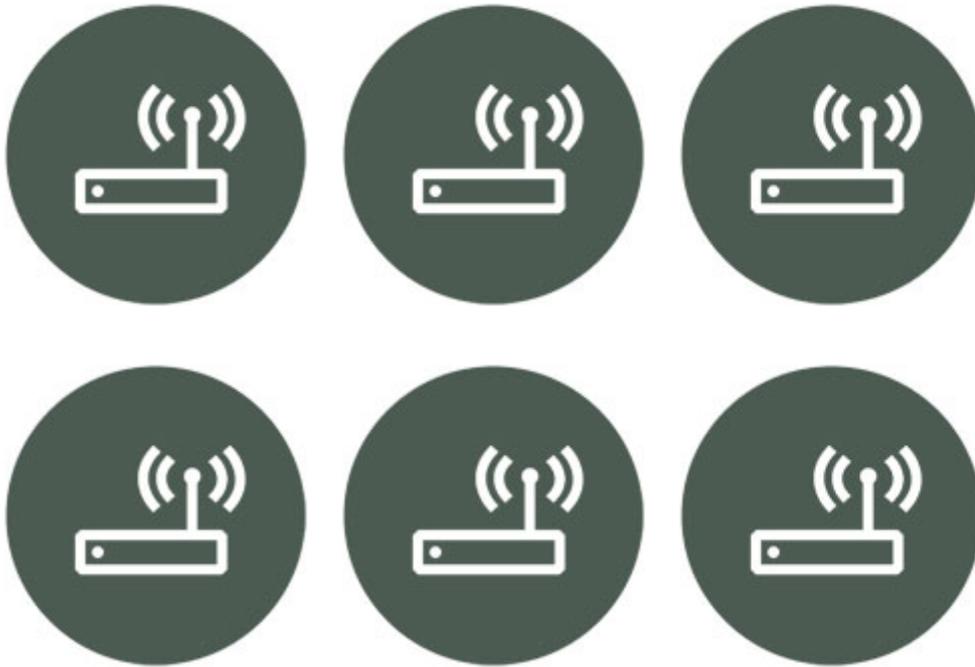
Shrivenham, considering purchasing/ switching, BC1C2, 25-44 years

They are keen to know the percentage of customers who achieve the top speed to help them determine the likelihood of personally achieving this speed. This typology already knows about the factors that impact broadband speeds and use speed checkers so this information is not necessary.

8.3 Advert formats

Whilst there is a desire for a mix of speed claims, there is also strong suggestion that too much information in adverts is likely to disengage or confuse customers.

It is also clear that appeal of adverts is a key concern for customers and therefore there is some reticence towards the use of minimum speeds as an advertising hook; some feel that the higher speeds may need to be included to capture the attention of customers.



QUALITATIVE RESEARCH FOR BROADBAND SPEED

Appendices

17 November, 2016

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1 Sample

The sample, shown by stage and including locations is provided below.

Location	Mini-groups		Depths
Stage One			
London	Mini-group 5 ○ Currently/ recently switched or purchased ○ BC1C2 ○ 45+ years	Mini-group 6 ○ Considering purchasing/ switching ○ C2DE ○ 25-44 years	Depths 1 and 2 ○ Currently/ recently switched or purchased
Leicester	Mini-group 1 ○ Considering purchasing/ switching ○ BC1 ○ 60+ years	Mini-group 2 ○ Currently/ recently switched or purchased ○ C1C2D ○ 20-44 years	-
Ainsworth	Mini-group 3 ○ Considering purchasing/ switching ○ C1C2D ○ 18-29 years	Mini-group 4 ○ Considering purchasing/ switching ○ BC1 ○ 45-59 years	Depths 3 and 4 ○ Currently/ recently switched or purchased
Stage Two			
Southampton	Mini-group 7 ○ Considering purchasing/ switching ○ C2DE ○ 60+ years	Mini-group 8 ○ Currently/ recently switched or purchased ○ BC1C2 ○ 20-44 years	-
Aberystwyth	Mini-group 9 ○ Considering purchasing/ switching ○ BC1 ○ 18-29 years	Mini-group 10 ○ Considering purchasing/ switching ○ C1C2D ○ 25-44 years	Depths 5 and 6 • Both currently/ recently switched or purchased
Leeds	Mini-group 11 ○ Currently/ recently switched or purchased ○ C1C2D ○ 45+ years		Depths 7 and 8 • Both currently/ recently switched or purchased
Stage Three			
Aberdeen	Mini-group 13 ○ Considering purchasing/ switching ○ C2DE ○ 45-59 years	Mini-group 14 ○ Currently/ recently switched or purchased ○ BC1C2 ○ 20-44 years	Depths 11 and 12 • Both currently/ recently switched or purchased
Shrivenham	Mini-group 12 ○ Considering purchasing/ switching ○ BC1C2 ○ 25-44 years		Depths 9 and 10 • Both currently/ recently switched or purchased

2 Discussion Guides

The following discussion guide was used in stage 1 of the research:

2.1 Stage 1 discussion guide

The following discussion guide was used in stage 1 of the research.

Discussion Guide

Stage 1 Rotation Plan for claim in isolation vs. claim in advert context

Half of the mini-groups will begin by seeing the claim in isolation (include section 4 of the discussion guide) and half of the mini-groups will begin by seeing the claim in advert context (not include section 4 of the guide).

Mini-group	Description	Include section 4?
Mini-group 5	London Currently/ recently switched or purchased, BC1C2, 45+ years	Yes
Mini-group 6	London Considering purchasing/ switching, C2DE, 25-44 years	No
Mini-group 1	Leicester Considering purchasing/ switching, BC1, 60+ years	Yes
Mini-group 2	Leicester Currently/ recently switched or purchased, C1C2D, 20-44 years	No
Mini-group 3	Ainsworth Considering purchasing/ switching, C1C2D, 18-29 years	Yes
Mini-group 4	Ainsworth Considering purchasing/ switching, BC1, 45-59 years	No

Adverts to be shown:

These will be shown in A3 with smaller A4 copies for people to look at individually.

BT 1



Sky 1



BT TV



BT 3



Sky 2



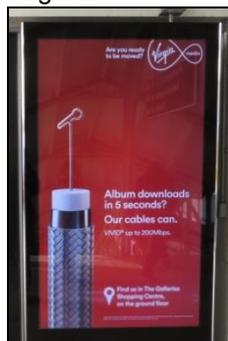
Virgin TV



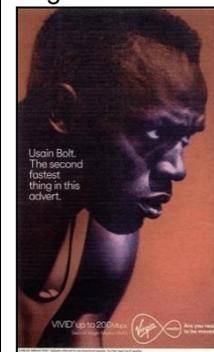
BT 4



Virgin 2



Virgin 6



Virgin 4 (full letter: participants asked to look specifically at page 1 and 4)



Virgin 3



Stage 1 Rotation Plans for Adverts shown

Core adverts	BT 3	Seen by 4 groups
	Sky 2	Seen by 4 groups
	Virgin 6	Seen by 4 groups
	BT TV	Seen by 3 groups
	Virgin TV	Seen by 3 groups
Secondary adverts Where possible include 2 of these in each group depending on time available	BT 1	Seen by 2 groups
	Sky 1	Seen by 2 groups
	BT 4	Seen by 2 groups
	Virgin 2	Seen by 2 groups
	Virgin 4	Seen by 2 groups
	Virgin 3	Seen by 2 groups

Mini-group	Description	Individual Exercise	Adverts tested – in order shown – DEFINITELY SHOW ADVERTS HIGHLIGHTED IN BOLD
Mini-group 5	London Currently/ recently switched or purchased, BC1C2, 45+ years	BT 3 Sky 2 WITH PROMPTS	BT 3 Sky 2 Virgin 3 Sky 1 BT TV
Mini-group 6	London Considering purchasing/ switching, C2DE, 25-44 years	Sky 2 Virgin 6 WITHOUT PROMPTS	Sky 2 Virgin 6 BT 4 Virgin 2 Virgin TV
Mini-group 1	Leicester Considering purchasing/ switching, BC1, 60+ years	Virgin 6 BT 3 WITHOUT PROMPTS	Virgin 6 BT 3 Virgin 4 Sky 1 Virgin TV
Mini-group 2	Leicester Currently/ recently switched or purchased, C1C2D, 20-44 years	Sky 2 BT 3 WITH PROMPTS	Sky 2 BT 3 Virgin 2 BT 1 BT TV
Mini-group 3	Ainsworth Considering purchasing/ switching, C1C2D, 18-29 years	BT 3 Virgin 6 WITH PROMPTS	BT 3 Virgin 6 Virgin 4 BT 4 BT TV
Mini-group 4	Ainsworth Considering purchasing/ switching, BC1, 45-59 years	Virgin 6 Sky 2 WITHOUT PROMPTS	Virgin 6 Sky 2 Virgin 3 BT 1 Virgin TV

Moderator notes:

STIMULUS A provides an overview of what mb/ mbps means. Please only show this to participants once they have had an option to spontaneously discuss whether they understand this/ how they interpret this.

STIMULUS B provides an overview of download vs. upload activities. Please use this if there are any queries about the different between download and upload. Please note that all speeds described in the adverts are download speeds.

AVERAGES: please note that when we are referring to average speeds we mean the average of the speeds that different customers get, as opposed to the average speed that an individual will achieve during the course of the day. Please ensure participants are clear about this.

1. Individual exercises

10 mins

(Aim: gather individual understanding of claims before these are influenced/ discussed by the group)

- Thank you very much for coming along this afternoon/ evening.
- Introduce self.
- This afternoon/ evening we are going to be talking about some specific aspects of advertising for broadband services for your home. I will tell you who has commissioned the research at the end of the session.
- Discussion will last 2 hours.
- Audio recording/ viewing, and MRS code of conduct.

I'd like to start the session by asking you to complete an individual exercise.

- Please complete the exercise on your own without discussing any of it with anyone else. If you have a question please raise your hand and I will come to you.
- You have 10 minutes to complete the exercise so please take your time. There are no right or wrong answers so please write exactly what you think!
- When we have all finished we can introduce ourselves to each other and we'll be discussing your answers during the session.

STIMULUS 1 - Individual Exercise (please see rotation plan. Half the group should see one advert and the other half a different advert).

2. Introductions

5 mins

(Aim: introduce participants to the research and each other)

Thank you for completing your exercises. We will come back to these later. Now it would be great to go around the room and introduce yourselves to each other:

- First name, broadband provider, favourite advert (for any product)

Just to clarify, when talking this afternoon/ evening:

- When we talk about broadband we mean the internet connection to your home. This internet connection allows you to:
 - Get Wi-Fi in your home
 - Download content from the internet e.g. email, video, TV programmes, music.
 - Upload content to the internet e.g. send emails, upload photos to Facebook.
- When we talk about broadband provider we mean the company that provides the broadband to your home. So this could be BT, Virgin or Sky for example.

3. Decision making processes**10 mins**

(Aim: to explore the role that speed plays in choosing broadband provider and how speed is understood)

I'd like to talk a little bit about the types of things you think about when deciding on a broadband provider. Please refer to the first page of your exercise as we talk about this.

- What types of things did people write down as important?
 - *Moderator:*
 - *Flip chart responses*
 - *If speed not mentioned prompt why not, and add to list*
- Looking at this list which things are most important
 - *Moderator: rank the items on the list and prompt for rationale for where speed is positioned.*

Thinking specifically about **speed**...

- How important is speed? Why?
- To what extent do you take this into account when deciding on a broadband provider?
 - Why/ why not?
- How clear is it what different speeds mean?
 - *Moderator: show **STIMULUS A** if needed*
- What type of information is useful to you about speed?
- Where/ when do you tend to hear about broadband speeds?
- What have you heard?
- What can affect the speed of broadband in your home?
 - What experiences has anyone had?
- What broadband speed do you have in your home?
 - *Where participants know this:*
 - How do you know about the speed?
 - What has been your experience of this?
 - How important was this when deciding on your broadband provider?
 - *Where participants do not know this:*
 - Why do you think this is something you don't know about?
 - How interested would you be in this type of information?

4. Up to claim in isolation (MINI-GROUPS 1, 3 and 5)**10 mins**

(Aim: test the claim without influences of the advert context)

I'd now like to look at what some of the adverts we have already looked at have said in more detail.

STIMULUS 2 - UP TO CLAIM IN ISOLATION

- What is this saying/ what does this mean?
 - How clear is this?
 - What it is referring to?
- How useful is it to have this information in the advert?
- The statement says 'up to'...
 - What does this mean?
 - How clear is this

- Which customers do you think would receive this speed?
- How many customers do you think would receive this speed?
- What would your expectation be in terms of the type of speed that you would receive?
- What do you think could affect the speed you receive?

ALL MINI-GROUPS TO COVER THE REMAINING SECTIONS

5. Up to claim in advert 30 mins /40 mins if not covered section 4

(Aim: test the claim within the advert context)

I'd now like to look at the adverts we've already looked at as well as some other adverts in more detail. Please refer to the answers you gave to questions 5, 6 and 7 of your exercises.

STIMULUS 3 - ADVERTS ALREADY REVIEWED THEN ADVERTS NOT YET REVIEWED (SEE ROTATION PLAN)

For each advert:

- What is the advert saying?
- How clear is this information?

The statement says 'up to'...

- What does this mean?
- How clear is this?
- Why does the advert use the phrase 'up to'?
- Which customers do you think would receive this speed?
 - What about the advert suggest this?
- How many customers do you think would receive this speed?
 - What about the advert suggest this?
- What speed do you think your home would get?
 - What about the advert suggests this?
 - Prompt: words/ phrase, images, small print?
- *Moderator please prompt for the following types of advert specifics and to what extent they help participants understand speed claims:*
 - How useful is the small print?
 - How useful is it to compare the different speeds offered by the provider?
 - How useful is it to compare the different speeds offered by different providers (e.g. BT 3 and BT TV)?
 - How useful is it to talk about the types of tasks you might be able to carry out (e.g. Virgin 2 download music album)
 - How useful is it to talk about the number of people who can use the broadband (e.g. Virgin TV whole house using social media)
- Would you expect to receive this speed all of the time?
- Do your expectations for the speed you would receive change if this advert is shown in a local newspaper vs. a national newspaper? Why/ why not?
 - *Moderator: prompt any differences around local/ regional/ national context for the advert*
 - *Moderator: prompt for any differences in views for posters/ TV ads vs. letter*
- Would you expect to receive this speed all of the time?
- What do you think could affect the speed you receive?
 - What about the advert suggests this?
 - Prompt: words/ phrase, images, small print?

- To what extent does speed stand out for this advert? Why/ why not?
- What would you do after seeing this advert? If you were looking to get a new broadband provider, what would be your next steps after seeing this advert?
 - Prompt: purchase, look elsewhere, look for more information,
 - Is this based on the speed of the broadband or something else?
 - Prompt: get a speed check? Has anyone used a speed checker? To what extent is this something that people have considered/ thought about?
 - **STIMULUS 4 – SCENARIOS IF NEEDED**
 - *Moderator: use scenario to help participants consider next steps if they struggle to think of these themselves.*
 - *Jim/ Jane has just seen this advert...what do you think they would do next?*

6. Across all adverts

10 mins

(Aim: overall review of all adverts looked at)

ACROSS ALL ADVERTS:

Now that we've had a chance to look at a variety of adverts about broadband speed...

- How clear is the information about speed?

STIMULUS 5 – BAROMETER EXERCISE

Moderator: explain and ask participants to complete then discuss answers

- Which adverts are more and less clear? Why?
- How clear are you about the speed you would receive for your home?
 - Why/ why not?
 - What could improve this?
 - What else do you need to know?
- What would need to happen for them to score a 10?
- What questions do you still have about broadband speed in general?

7. Up to claim information provision

20 mins

(Aim: inform participants about the 'up to claim' rules, clarity of these as a way to determine speed and suggestions for any improvements)

I now have some information to provide you about broadband speeds and how these are presented in adverts.

STIMULUS 6 – UP TO CLAIM INFORMATION

- Based on this information, how clear do you think the adverts are?
- To what extent does this change your views on:
 - Which customers would receive this speed?
 - How many customers would receive this speed?
 - The type of speed that you would receive?
- Now we know more about what 'up to 52mb' means...
 - How useful is the phrase 'up to'?
 - How useful is phrase 'up to' in telling people that not all customers will get the speed?
 - How useful is the phrase 'up to' in telling people that this is the top speed available?
 - As we have seen 'Up to 52mb' means at least 10% of customers will get the speed.
 - How useful is it to know the speed that at least 10% of customers will achieve?

- How useful is the small print included in the adverts we have looked at?
- What you would do after seeing the advert?
 - *Moderator: if helpful refer back to Jim and Jane scenarios: what would they do now that they know this information. Anything different or the same?*
- How could the adverts make broadband speeds clearer?
 - What type of information would be useful?

Moderator: gather spontaneous ideas/ suggestions then prompt:

- Include the 10% information?
 - How useful would this be? Why/ why not?
 - What other information could be provided to help?
- Include information about things that affect the speed you can receive?
 - **STIMULUS 7 – things that can affect your speed**
 - How useful is it to know about these types of things? Why/ why not?
 - To what extent would you expect these to be included in an advert?
 - How does this type of information affect what you would do after seeing the advert?
 - Now we know more about what can affect your speed...
 - How do you feel about the phrase 'up to'?
 - How do you feel about the adverts advertising speeds that 10% of customers will achieve?
- Include information about the types of online activity you could reasonably expect to carry out?
 - E.g. basic browsing, using Facebook, streaming music or video content
- What other information would be helpful?

STIMULUS 8: This stimulus relates to the impact of different connection types (e.g. ADSL and Cable). If this is mentioned by participants spontaneously this stimulus can be used to clarify and provide further information.

STIMULUS 9: This stimulus relates to average speeds. If this is spontaneously mentioned by participants this stimulus will be used during this section with the following prompts. Otherwise, this will be covered in the following section.

Average speed prompts:

- Now that we know more about the average speeds...
 - How clear do you think the adverts we have looked at are?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - The type of speed that you would receive?
 - How does this compare to the 10% information we have already looked at?
 - Does it change your views at all? Why/ why not?

Averages and technology:

- What do you think about including information about technology?
 - How clear is this?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - The type of speed that you would receive?
 - How does this compare to the 10% information we have already looked at?
 - Does it change your views at all? Why/ why not?

8. Alternatives for speed claims**20 mins**

(Aim: explore views regarding potential alternatives)

Imagine that you were in charge of an advert for broadband speed. You need to make sure that people are clear about the type of speed that people should expect to achieve in their home...

- What information would you include?
- *Moderator: flipchart list of suggestions*
- At the moment, the adverts say 'up to'. As we saw earlier, this means that at least 10% of a provider's customers can achieve this speed.
 - Would you keep this or change this? Why?
 - Is there a different way that they can let people know what type of speed customers can achieve?
 - Gather spontaneous ideas
- I've now got some ideas for other ways that broadband speed can be described. I'm interested to know your views on these...

If not covered previously – first look at averages.

STIMULUS 9: This stimulus relates to average speeds. If this is spontaneously mentioned by participants this stimulus will be used during this section with the following prompts. Otherwise, this will be covered in the following section.

Average speed prompts:

- Now that we know more about the average speeds...
 - How clear do you think the adverts we have looked at are?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - How many customers do you think would receive this speed?
 - The type of speed that you would receive?
 - How does this compare to the 10% information we have already looked at?
 - Does it change your views at all? Why/ why not?

Averages and technology:

- What do you think about including information about technology?
 - How clear is this?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - The type of speed that you would receive?
 - How does this compare to the 10% information we have already looked at?
 - Does it change your views at all? Why/ why not?

STIMULUS 10 – alternatives

- What do you think about these?
- Which is clearest? Why?
- What other ways could this information be provided?

9. Summary and wrap up**5 mins**

(Aim: close the discussion)

Thinking about everything that we have discussed this afternoon/ evening...

- How important do you think it is to tell people about the speed of broadband in adverts?
 - Why/ why not?
 - How would you feel if adverts did not mention speed?
 - Would it matter?
 - What assumptions would you make about the speed, if any?
- And overall, what do you think is the clearest way to talk about broadband speeds in adverts?
 - *Moderator: lay out stimulus 6, 8 and 10 for participants to remind participants of key things discussed*
- Any questions?
- This research is being carried out on behalf of the Advertising Standards Authority. They are responsible for ensuring that the guidelines for advertising are met. They are interested in finding out what people think about broadband advertising relating to speed of broadband.
- Thank you for your time.

Thank and Close

2.2 Stage 2 discussion guide

The following discussion guide was used in stage 2 of the research.

Discussion Guide

Stage 2 Stimulus:

Mocked up Advert	Primary stimulus	Secondary stimulus
Up to	<ul style="list-style-type: none"> Up to with explanation (ADSL 1, FTTC 1, Cable 1) 	<ul style="list-style-type: none"> Up to plus average (ADSL 2, FTTC 2, Cable 2) Up to with explanation plus average (ADSL 3, FTTC 3, Cable 3) Up to with explanation plus information about factors/ signposting to speed checker (ADSL 4, FTTC 4, Cable 4)
Average	<ul style="list-style-type: none"> Average (ADSL 5, FTTC 5, Cable 5) 	<ul style="list-style-type: none"> Average including word 'customer' (ADSL 6, FTTC 6, Cable 6) Average plus download times (ADSL 7, FTTC 7, Cable 7)
Range	<ul style="list-style-type: none"> Range (ADSL 8, FTTC 8, Cable 8) 	
Minimum	<ul style="list-style-type: none"> Minimum (ADSL 9, FTTC 9, Cable 9) 	

Stage 2 Adverts:

Core adverts	BT 3	Seen in all groups
	Sky 2	
	Virgin 6	
	BT TV	
Secondary adverts Only shown it time	Virgin TV	Rotated across groups
	BT 1	Moderators to take a copy of these but unlikely there will be time to show them
	Sky 1	
	BT 4	
	Virgin 2	
Virgin 4		
	Virgin 3	

Stage 2 Rotation Plan

Please note for individual exercises: 2 participants will see each variation indicated.

Mini-group	Description	Individual exercise 1	Mock ups	Individual exercise 2	Real Life Adverts
Mini-group 7	Southampton Considering purchasing/switching C2DE 60+ years	Range <ul style="list-style-type: none"> • ADSL • FTTC • Cable 	Range Up to Minimum Average	BT 3 Sky 2 Virgin 6	BT 3 Sky 2 Virgin 6 BT TV
Mini-group 8	Southampton Currently/ recently switched or purchased BC1C2 20-44 years	Up to <ul style="list-style-type: none"> • ADSL • FTTC • Cable 	Up to Range Minimum Average	BT 3 Sky 2 Virgin 6	Virgin 6 BT 3 Virgin TV Sky 2
Mini-group 9	Aberystwyth Considering purchasing/switching BC1 18-29 years	Average <ul style="list-style-type: none"> • ADSL • FTTC • Cable 	Average Minimum Up to Range	BT 3 Sky 2 Virgin 6	Sky 2 BT TV Virgin 6 BT 3
Mini-group 10	Aberystwyth Considering purchasing/switching C1C2D 25-44 years	Up to <ul style="list-style-type: none"> • ADSL • FTTC • Cable 	Up to Average Range Minimum	BT 3 Sky 2 Virgin 6	Virgin TV Virgin 6 Sky 2 BT 3
Mini-group 11	Leeds Currently/ recently switched or purchased C1C2D 45+ years	Minimum <ul style="list-style-type: none"> • ADSL • FTTC • Cable 	Minimum Up to Range Average	BT 3 Sky 2 Virgin 6	BT TV Sky 2 Virgin 6 BT 3

Moderator notes:

STIMULUS A provides an overview of what mb/ mbps means. Please only show this to participants once they have had an option to spontaneously discuss whether they understand this/ how they interpret this.

STIMULUS B provides an overview of download vs. upload activities. Please use this if there are any queries about the different between download and upload. Please note that all speeds described in the adverts are download speeds.

STIMULUS C provides information about different technologies and can be used if participants talk about this.

STIMULUS D-H provides detail about how speeds have been calculated. Please use this if asked for this information by participants.

AVERAGES: please note that when we are referring to average speeds we mean the average of the speeds that different customers get, as opposed to the average speed that an individual will achieve during the course of the day. Please ensure participants are clear about this.

DOWNLOAD TIMES: please note that these are examples only.

1. Individual exercises

10 mins

(Aim: gather individual understanding of claims before these are influenced/ discussed by the group)

- Thank you very much for coming along this afternoon/ evening.
- Introduce self.
- This afternoon/ evening we are going to be talking about some specific aspects of advertising for broadband services for your home. I will tell you who has commissioned the research at the end of the session.
- Discussion will last 2 hours.
- Audio recording/ viewing, and MRS code of conduct.

I'd like to start the session by asking you to complete an individual exercise.

- Please complete the exercise on your own without discussing any of it with anyone else. If you have a question please raise your hand and I will come to you.
- You have 10 minutes to complete the exercise so please take your time. There are no right or wrong answers so please write exactly what you think!
- When we have all finished we can introduce ourselves to each other and we'll be discussing your answers during the session.

STIMULUS 1 - Individual Exercise (please see rotation plan. 2 x participants will see an ADSL advert, 2 x will see a FTTC advert and 2 x will see a Cable advert).

2. Introductions

5 mins

(Aim: introduce participants to the research and each other)

Thank you for completing your exercises. We will come back to these later. Now it would be great to go around the room and introduce yourselves to each other:

- First name, broadband provider, favourite advert (for any product)

Just to clarify, when talking this afternoon/ evening:

- When we talk about broadband we mean the internet connection to your home. This internet connection allows you to:
 - Get Wi-Fi in your home
 - Download content from the internet e.g. email, video, TV programmes, music.
 - Upload content to the internet e.g. send emails, upload photos to Facebook.
- When we talk about broadband provider we mean the company that provides the broadband to your home. So this could be BT, Virgin or Sky for example.

3. Decision making processes

10 mins

(Aim: to explore the role that speed plays in choosing broadband provider and how speed is understood)

I'd like to talk a little bit about the types of things you think about when deciding on a broadband provider. Please refer to the first page of your exercise as we talk about this.

- What types of things did people write down as important?
 - *Moderator:*
 - *Flip chart responses*
 - *If speed not mentioned prompt why not, and add to list*
- Looking at this list which things are most important
 - *Moderator: rank the items on the list and prompt for rationale for where speed is positioned.*

Thinking specifically about **speed**...

- How important is speed? Why?
- To what extent do you take this into account when deciding on a broadband provider?
 - Why/ why not?
- How clear is it what different speeds mean?
 - *Moderator: show **STIMULUS A** if needed*
- What type of information is useful to you about speed?
- Where/ when do you tend to hear about broadband speeds?
- What have you heard?
- What can affect the speed of broadband in your home?
 - What experiences has anyone had?
- What broadband speed do you have in your home?
 - *Where participants know this:*
 - How do you know about the speed?
 - What has been your experience of this?
 - How important was this when deciding on your broadband provider?
 - *Where participants do not know this:*
 - Why do you think this is something you don't know about?
 - How interested would you be in this type of information?

4. Mock ups (see rotation plan)

60 mins

(Aim: test clarity and understanding of mock-ups)

I'd now like to look at the example adverts we've already looked at as well as some other ones in more detail. I should mention that these adverts are examples that have been put together for the research.

As we discuss these, please refer to the answers you gave to questions 5, 6 and 7 of your exercises.

STIMULUS 2 – MOCK UPS (SEE ROTATION PLAN)

FOR EACH VERSION OF MOCK UP ADVERT SHOWN, PLACE ALL THREE VERSIONS ON TABLE FOR PARTICIPANTS TO LOOK AT BEFORE DISCUSSING THE FOLLOWING.

QUESTIONS FOR ALL MOCK-UPS:

- What is the advert saying?
- How clear is this information?
- Which customers do you think would receive this speed?

- What about the advert suggest this?
- How many customers do you think would receive this speed?
 - What about the advert suggest this?
- What speed do you think your home would get?
 - What about the advert suggests this?
 - Prompt: words/ phrase, small print?
 - *Moderator please prompt for the following types of advert specifics and to what extent they help participants understand speed claims:*
 - How useful is the small print?
 - Would you expect to receive this speed all of the time?
- What do you think could affect the speed you receive?
 - What about the advert suggests this?
 - Prompt: words/ phrase, small print?
- To what extent does speed stand out for this advert? Why/ why not?
- What would you do after seeing this advert? If you were looking to get a new broadband provider, what would be your next steps after seeing this advert?
 - Prompt: purchase, look elsewhere, look for more information,
 - Is this based on the speed of the broadband or something else?
 - Prompt: get a speed check? Has anyone used a speed checker? To what extent is this something that people have considered/ thought about?
- And overall, do your expectations for the speed you would receive change if this advert is shown in a local newspaper vs. a national newspaper? Why/ why not?
 - *Moderator: prompt any differences around local/ regional/ national context for the advert*
 - *Moderator: prompt for any differences in views for posters/ TV ads vs. letter*

PROMPTS FOR 'UP TO':

- This advert uses the phrase 'up to'...
 - What does this mean?
 - How clear is this?
- How useful is phrase 'up to' in telling people that not all customers will get the speed?
- How useful is the phrase 'up to' in telling people that this is the top speed available?
- How useful is it to know the speed that at least 10% of customers will achieve?
- **STIMULUS D- 'UP TO'**
 - *Moderator, show stimulus to clarify, and check understanding.*
- **For 'up to' plus average:**
 - How useful is it to also be provided the average speed?
 - How clear is average? What do you think this means?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - How many customers do you think would receive this speed?
 - The type of speed that you would receive?
 - How useful is it to have the 'up to' and average speed on the advert?
 - **STIMULUS E – AVERAGE**
 - *Moderator: show stimulus to clarify, and check understanding*
 - *If already seen stimulus E, refer back to it if needed*
- **For 'up to' plus explanation plus average:**
 - How useful is it to know the speed that at least 10% of customers will achieve AND the average speed?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - How many customers do you think would receive this speed?

- The type of speed that you would receive?
- **For 'up to' plus factors and speed checker:**
 - How useful is it to know that there are things that can affect the speed you receive? Why/ why not?
 - What types of things could affect your speeds?
 - **STIMULUS 3**
 - How useful is it to know about these types of things? Why/ why not?
 - How useful is it to be told how to get a personalised speed check?
 - To what extent would you expect these things to be included in an advert?
 - How does this type of information affect what you would do after seeing the advert?

PROMPTS FOR AVERAGE:

- This advert provides average speeds...
 - What does this mean?
 - How clear is this?
 - How useful is it to also be provided the average speed?
 - **STIMULUS E – AVERAGE**
 - *Moderator: show stimulus to clarify, and check understanding*
 - *If already seen stimulus E, refer back to it if needed*
- **Average plus 'customer':**
 - How useful is it to include the word 'customer'? Why/ why not?
- **Average plus download times:**
 - How useful is it to talk about the types of tasks you might be able to carry out?
 - How useful is it to give information about how long it takes to download content?
 - How does this change your views/ understanding of the speeds advertised? Why?
 - **STIMULUS F – DOWNLOADS**
 - *Moderator: show stimulus to clarify, and check understanding*

PROMPTS FOR RANGE:

- The advert provides a speed range...
 - What does this mean?
 - How clear is this?
 - How useful is it to be provided with the speed range?
 - **STIMULUS G – RANGE**
 - *Moderator: show stimulus to clarify, and check understanding*

PROMPTS FOR MINIMUM:

- The advert provides a minimum speed...
 - What does this mean?
 - How clear is this?
 - How useful is it to be provided with the minimum speed?
 - **STIMULUS H – MINIMUM**
 - *Moderator: show stimulus to clarify, and check understanding*

5. Across all adverts

10 mins

(Aim: overall review of all mock-ups looked at)

ACROSS ALL ADVERTS:

Now that we've had a chance to look at a variety of example adverts about broadband speed...

- How clear is the information about speed?
- Which adverts are more and less clear? Why?
- How clear are you about the speed you would receive for your home?
 - Why/ why not?
 - What could improve this?
 - What else do you need to know?
- Which speed information do you think is most useful to provide?
- **STIMULUS 4**
 - Looking at all of the different speed information we have seen...
 - Which is easiest to understand/ clearest? Why?
 - Which is most useful in helping you understand the type of speed you would expect to get in your home?
 - If you were designing an advert about broadband speed, which of these would you include? Why?
- What other information would also be useful?
 - What else about speed would you want to know?
 - What else could help you be clear on what type of speed you might expect to get at home?

6. Real Life adverts (see rotation plan)

20 mins

(Aim: look at real life adverts)

I now have some real life adverts to show you...

Firstly, I'd like you to fill out an individual exercise again...

INDIVIDUAL EXERCISE 2

Now let's look at the adverts and please refer to the answers you have just completed...

STIMULUS 6 – ADVERTS (SEE ROTATION PLAN)

For each advert:

- What is this advert saying about speed?
- How clear is this?
 - **STIMULUS D** – moderator show stimulus D to clarify that real life adverts with 'up to' refer to at least 10% of customers
- Knowing this now, how does the advert compare to the examples we looked at earlier?
 - What is better?
 - What is worse?
- For Sky:
 - How useful is it to compare the different speeds offered by the provider?
- For BT:
 - How useful is it to compare the different speeds offered by different providers (e.g. BT 3 and BT TV)?

Once all adverts reviewed:

- Overall, what do you think about the way speeds are currently advertised?
 - How clear are they?
 - How could they be improved?
 - (Refer to **STIMULUS 4** if helpful)

7. Summary and wrap up

5 mins

(Aim: close the discussion)

Thinking about everything that we have discussed this afternoon/ evening...

- How important do you think it is to tell people about the speed of broadband in adverts?
 - Why/ why not?
 - How would you feel if adverts did not mention speed?
 - Would it matter?
 - What assumptions would you make about the speed, if any?
- And overall, what do you think is the clearest way to talk about broadband speeds in adverts?
- Any questions?
- This research is being carried out on behalf of the Advertising Standards Authority. They are responsible for ensuring that the guidelines for advertising are met. They are interested in finding out what people think about broadband advertising relating to speed of broadband.
- Thank you for your time.

Thank and Close

2.3 Stage 3 discussion guide

The following discussion guide was used in stage 3 of the research.

Discussion Guide

Stage 3 Stimulus:

Mocked up Advert	Primary stimulus	Secondary stimulus
Up to	<ul style="list-style-type: none"> Up to with explanation (ADSL 1, FTTC 1, Cable 1) 	<ul style="list-style-type: none"> Up to with explanation plus information about factors/ signposting to speed checker (ADSL 4, FTTC 4, Cable 4)
Average	<ul style="list-style-type: none"> Average (ADSL 5, FTTC 5, Cable 5) 	
Range	<ul style="list-style-type: none"> Range (ADSL 8, FTTC 8, Cable 8) 	
Minimum	<ul style="list-style-type: none"> Minimum (ADSL 9, FTTC 9, Cable 9) 	

Stage 3 Adverts:

Core adverts	BT 3	Seen in all groups
	Sky 2	
	Virgin 6	
	BT TV	Rotated across groups
	Virgin TV	
Secondary adverts	BT 1	Moderators to take a copy of these but unlikely there will be time to show them
Only shown it time	Sky 1	
	BT 4	
	Virgin 2	
	Virgin 4	
	Virgin 3	

Adverts to be shown:

These will be shown in A3 with smaller A4 copies for people to look at individually.

BT 1



Sky 1



BT TV



BT 3



Sky 2



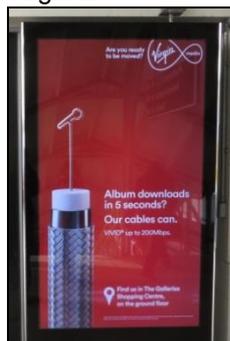
Virgin TV



BT 4



Virgin 2



Virgin 6



Virgin 4 (full letter: participants asked to look specifically at page 1 and 4)



Virgin 3



Stage 3 Rotation Plan

Real Life adverts: definitely show the ones highlighted in bold. If time show one other.

Mini-group	Description	Individual exercise 1	Real Life Adverts	Mock ups
Mini-group 12	<ul style="list-style-type: none"> ○ Considering purchasing/switching ○ BC1C2 ○ 25-44 years 	BT 3 Sky 2 Virgin 6	BT 3 Sky 2 Virgin 6 Sky 1 Virgin TV	Average Minimum Range Up to
Mini-group 13	<ul style="list-style-type: none"> ○ Considering purchasing/switching ○ C2DE ○ 45-59 years 	BT 3 Sky 2 Virgin 6	Virgin 6 BT 3 Sky 3 Virgin 2 BT TV	Up to Range Minimum Average
Mini-group 14	<ul style="list-style-type: none"> ○ Currently/recently switched or purchased ○ BC1C2 ○ 20-44 years 	BT 3 Sky 2 Virgin 6	Sky 2 BT 3 Virgin 6 BT 2 Virgin TV	Range Up to Average Minimum

Moderator notes:

STIMULUS A provides an overview of what mb/ mbps means. Please only show this to participants once they have had an option to spontaneously discuss whether they understand this/ how they interpret this.

STIMULUS B provides an overview of download vs. upload activities. Please use this if there are any queries about the different between download and upload. Please note that all speeds described in the adverts are download speeds.

STIMULUS C provides information about different technologies and can be used if participants talk about this.

STIMULUS D provides detail about 'up to'speeds.

AVERAGES: please note that when we are referring to average speeds we mean the average of the speeds that different customers get, as opposed to the average speed that an individual will achieve during the course of the day. Please ensure participants are clear about this.

DOWNLOAD TIMES: please note that these are examples only.

1. Individual exercises: real life adverts

10 mins

(Aim: gather individual understanding of claims before these are influenced/ discussed by the group)

- Thank you very much for coming along this afternoon/ evening.
- Introduce self.
- This afternoon/ evening we are going to be talking about some specific aspects of advertising for broadband services for your home. I will tell you who has commissioned the research at the end of the session.
- Discussion will last 2 hours.
- Audio recording/ viewing, and MRS code of conduct.

I'd like to start the session by asking you to complete an individual exercise.

- Please complete the exercise on your own without discussing any of it with anyone else. If you have a question please raise your hand and I will come to you.
- You have 10 minutes to complete the exercise so please take your time. There are no right or wrong answers so please write exactly what you think!
- When we have all finished we can introduce ourselves to each other and we'll be discussing your answers during the session.

STIMULUS 1 - Individual Exercise (please see rotation plan. 2 x participants will see a BT ad, 2 x participants will see a Sky ad and 2 x participants will see a Virgin ad).

2. Introductions

5 mins

(Aim: introduce participants to the research and each other)

Thank you for completing your exercises. We will come back to these later. Now it would be great to go around the room and introduce yourselves to each other:

- First name, broadband provider, favourite advert (for any product)

Just to clarify, when talking this afternoon/ evening:

- When we talk about broadband we mean the internet connection to your home. This internet connection allows you to:
 - Get Wi-Fi in your home
 - Download content from the internet e.g. email, video, TV programmes, music.
 - Upload content to the internet e.g. send emails, upload photos to Facebook.
- When we talk about broadband provider we mean the company that provides the broadband to your home. So this could be BT, Virgin or Sky for example.

3. Decision making processes

10 mins

(Aim: to explore the role that speed plays in choosing broadband provider and how speed is understood)

I'd like to talk a little bit about the types of things you think about when deciding on a broadband provider. Please refer to the first page of your exercise as we talk about this.

- What types of things did people write down as important?
 - *Moderator:*
 - *Flip chart responses*
 - *If speed not mentioned prompt why not, and add to list*
- Looking at this list which things are most important
 - *Moderator: rank the items on the list and prompt for rationale for where speed is positioned.*

Thinking specifically about **speed**...

- How important is speed? Why?
- To what extent do you take this into account when deciding on a broadband provider?
 - Why/ why not?
- How clear is it what different speeds mean?
 - *Moderator: show **STIMULUS A** if needed*
- What type of information is useful to you about speed?
- Where/ when do you tend to hear about broadband speeds?
- What have you heard?
- What can affect the speed of broadband in your home?
 - What experiences has anyone had?
- What broadband speed do you have in your home?
 - *Where participants know this:*
 - How do you know about the speed?
 - What has been your experience of this?
 - How important was this when deciding on your broadband provider?
 - *Where participants do not know this:*
 - Why do you think this is something you don't know about?
 - How interested would you be in this type of information?

4. Real adverts (see rotation plan)

30 mins

(Aim: test clarity and understanding of real adverts)

I'd now like to look at the example adverts we've already looked at as well as some other ones in more detail.

As we discuss these, please refer to the answers you gave to questions 5, 6 and 7 of your exercises.

I'd now like to look at the adverts we've already looked at as well as some other adverts in more detail. Please refer to the answers you gave to questions 5, 6 and 7 of your exercises.

STIMULUS - ADVERTS ALREADY REVIEWED THEN ADVERTS NOT YET REVIEWED (SEE ROTATION PLAN)

For each advert:

- What is the advert saying?
- How clear is this information?

The statement says 'up to'...

- What does this mean?
- How clear is this?
- Why does the advert use the phrase 'up to'?
- Which customers do you think would receive this speed?
 - What about the advert suggest this?
- What speed do you think your home would get?
 - **KEY QUESTION: Please get a response from each participant: What speed do you think your home would get?**
 - **MODERATOR NOTE: it is important to explore whether this expectation of speed they would achieve changes for different approaches (e.g. average, range etc.). Even an indication of 'full speed' or 'half' would be helpful to know. Please explore fully.**
 - What about the advert suggests this?
 - Prompt: words/ phrase, images, small print?
 - *Moderator please prompt for the following types of advert specifics and to what extent they help participants understand speed claims:*
 - How useful is the small print?
 - How useful is it to compare the different speeds offered by the provider?
 - How useful is it to compare the different speeds offered by different providers (e.g. BT 3 and BT TV)?
 - How useful is it to talk about the types of tasks you might be able to carry out (e.g. Virgin 2 download music album)
 - How useful is it to talk about the number of people who can use the broadband (e.g. Virgin TV whole house using social media)
 - Would you expect to receive this speed all of the time?
 - Do your expectations for the speed you would receive change if this advert is shown in a local newspaper vs. a national newspaper? Why/ why not?
 - *Moderator: prompt any differences around local/ regional/ national context for the advert*
 - *Moderator: prompt for any differences in views for posters/ TV ads vs. letter*
 - Would you expect to receive this speed all of the time?
- What do you think could affect the speed you receive?
 - What about the advert suggests this?
 - Prompt: words/ phrase, images, small print?
- To what extent does speed stand out for this advert? Why/ why not?
- What would you do after seeing this advert? If you were looking to get a new broadband provider, what would be your next steps after seeing this advert?
 - Prompt: purchase, look elsewhere, look for more information,
 - Is this based on the speed of the broadband or something else?
 - Prompt: get a speed check? Has anyone used a speed checker? To what extent is this something that people have considered/ thought about?
 - **SPEED PROMPTS:**

- Now that we've looked at this advert in more detail, can you write down what speed you think you would get in your home.
- Why have you given that answer?
 - **MODERATOR NOTE: the following questions is to explore attitudes towards receiving a lower speed than advertised, whether the advert is felt to be clear at informing people that they may not achieve the 'up to' speed and how much they think they would receive below the 'up to' speed. For all of the questions below please prompt why / why not they might expect to receive that speed.**

For 17mb ads	Might you expect to receive a speed of 8mb?
	Might you expect to receive a speed of 2mb?
For 38mb ads	Might you expect to receive a speed of 33mb?
	Might you expect to receive a speed of 25mb?
For 200mb ads	Might you expect to receive a speed of 175mb?
	Might you expect to receive a speed of 145mb?

- If you knew there was a chance you could receive [speed discussed] would you:
 - Do something different after seeing the advert? What/ why?

WHEN SEEN ALL REAL ADVERTS (AS PER ROTATION):

- **STIMULUS D** – moderator show stimulus D to clarify that real life adverts with 'up to' refer to at least 10% of customers
- Based on this information, how clear do you think the adverts are?
- To what extent does this change your views on:
 - Which customers would receive this speed?
 - The type of speed that you would receive?
- Now we know more about what 'up to 52mb' means...
 - How useful is the phrase 'up to'?
 - How useful is phrase 'up to' in telling people that not all customers will get the speed?
 - How useful is the phrase 'up to' in telling people that this is the top speed available?
 - As we have seen 'Up to 52mb' means at least 10% of customers will get the speed.
 - How useful is it to know the speed that at least 10% of customers will achieve?
 - How useful is the small print included in the adverts we have looked at?
- **KEY QUESTION: Now you know more about the speed what you would do after seeing the advert? Anything different or the same? Why?**
- How could the adverts make broadband speeds clearer?
 - What type of information would be useful?

4. Mock adverts (see rotation plan)

35 mins

(Aim: test clarity and understanding of alternative mock adverts)

I'd now like to look at some other examples for how broadband speeds could be described in adverts. I should mention that these adverts are examples that have been put together for the research.

STIMULUS – MOCK UPS (SEE ROTATION PLAN)

FOR EACH VERSION OF MOCK UP ADVERT SHOWN, PLACE ALL THREE VERSIONS ON TABLE FOR PARTICIPANTS TO LOOK AT BEFORE DISCUSSING THE FOLLOWING.

QUESTIONS FOR ALL MOCK-UPS:

- What is the advert saying?
- How clear is this information?
- Which customers do you think would receive this speed?
 - What about the advert suggest this?
- How many customers do you think would receive this speed?
 - What about the advert suggest this?
- **KEY QUESTION: Please get a response from each participant: What speed do you think your home would get?**
- **MODERATOR NOTE: it is important to explore whether this expectation of speed they would achieve changes for different approaches (e.g. average, range etc.). Even an indication of 'full speed' or 'half' would be helpful to know. Please explore fully.**
 - What about the advert suggests this?
 - Prompt: words/ phrase, small print?
 - *Moderator please prompt for the following types of advert specifics and to what extent they help participants understand speed claims:*
 - How useful is the small print?
 - Would you expect to receive this speed all of the time?
- What do you think could affect the speed you receive?
 - What about the advert suggests this?
 - Prompt: words/ phrase, small print?
- To what extent does speed stand out for this advert? Why/ why not?
- What would you do after seeing this advert? If you were looking to get a new broadband provider, what would be your next steps after seeing this advert?
 - Prompt: purchase, look elsewhere, look for more information,
 - Is this based on the speed of the broadband or something else?
 - Prompt: get a speed check? Has anyone used a speed checker? To what extent is this something that people have considered/ thought about?
- And overall, do your expectations for the speed you would receive change if this advert is shown in a local newspaper vs. a national newspaper? Why/ why not?
 - *Moderator: prompt any differences around local/ regional/ national context for the advert*
 - *Moderator: prompt for any differences in views for posters/ TV ads vs. letter*
- **SPEED PROMPTS:**
 - Based on this advert, please write down what speed you think you would get in your home.
 - Why have you given that answer?
 - **MODERATOR NOTE: the following questions is to explore attitudes towards receiving a lower speed than advertised, whether the advert is felt to be clear at informing people that they may not achieve the 'up to' speed and how much they think they would receive below the 'up to' speed. For all of the questions below please prompt why / why not they might expect to receive that speed.**

For 17mb ads	Might you expect to receive a speed of 8mb?
	Might you expect to receive a speed of 2mb?
For 38mb ads	Might you expect to receive a speed of 33mb?
	Might you expect to receive a speed of 25mb?
For 200mb ads	Might you expect to receive a speed of 175mb?
	Might you expect to receive a speed of 145mb?

- If you knew there was a chance you could receive [speed discussed] would you:
 - Do something different after seeing the advert? What/ why?
- *MODERATOR: for these speed prompts please explore any surprise/ negative feeling about achieving lower figures including:*
 - For AVERAGE: can I check why some of you are surprised? Did you understand that the average is the mid-point - so people will be receiving well above and well below that middle number?
 - For RANGE: Can I check why some of you are surprised? Did you understand that some people will receive speeds outside of the range?
- **Moderator note: use stimulus 7 if participants spontaneously mention download speed times at any point during this section**

PROMPTS FOR 'UP TO':

- This advert uses the phrase 'up to'...
 - What does this mean?
 - How clear is this?
- How useful is it to include the explanation of up to?
- How useful is the phrase 'up to' in telling people that this is the top speed available?
- How useful is it to know the speed that at least 10% of customers will achieve?
- **For 'up to' plus average:**
 - How useful is it to also be provided the average speed?
 - How clear is average? What do you think this means?
 - To what extent does this change your views on:
 - Which customers would receive the speed advertised?
 - How many customers do you think would receive this speed?
 - The type of speed that you would receive?
 - How useful is it to have the 'up to' and average speed on the advert?
- **For 'up to' plus factors and speed checker:**
 - How useful is it to know that there are things that can affect the speed you receive? Why/ why not?
 - What types of things could affect your speeds?
 - **STIMULUS 3**
 - How useful is it to know about these types of things? Why/ why not?
 - How useful is it to be told how to get a personalised speed check?
 - To what extent would you expect these things to be included in an advert?
 - How does this type of information affect what you would do after seeing the advert?

PROMPTS FOR AVERAGE:

- This advert provides average speeds...
 - What does this mean?
 - How clear is this?
 - How useful is it to also be provided the average speed?

PROMPTS FOR RANGE:

- The advert provides a speed range...
 - What does this mean?
 - How clear is this?
 - How useful is it to be provided with the speed range?

PROMPTS FOR MINIMUM:

- The advert provides a minimum speed...
 - What does this mean?
 - How clear is this?
 - How useful is it to be provided with the minimum speed?

5. Across all adverts

15 mins

(Aim: overall review of all mock-ups looked at)

ACROSS ALL ADVERTS:

Now that we've had a chance to look at a variety of example adverts about broadband speed...

- How clear is the information about speed?
- Which adverts are more and less clear? Why?
- How clear are you about the speed you would receive for your home?
 - Why/ why not?
 - What could improve this?
 - What else do you need to know?
- Which speed information do you think is most useful to provide?
- **STIMULUS 4**
 - Looking at all of the different speed information we have seen...
 - Which is easiest to understand/ clearest? Why?
 - Which is most useful in helping you understand the type of speed you would expect to get in your home?
 - How would you feel about having a combination of information on adverts?
 - Which work well in combination?
 - Which wouldn't work well?
 - Which combinations give you enough information about what speeds you might receive?
 - Which combinations would help manage peoples' expectations in terms of which speeds they might achieve?
 - Which combinations help you to understand what speeds you might receive?

- Which combinations do not help you / confuse you in understanding what speeds you might receive?
- What other information would also be useful?
 - What else about speed would you want to know?
 - What else could help you be clear on what type of speed you might expect to get at home?

Looking back to the real adverts we looked at to begin with...

Overall, what do you think about the way speeds are currently advertised?

- How clear are they?
- How could they be improved?

7. Summary and wrap up

5 mins

(Aim: close the discussion)

Thinking about everything that we have discussed this afternoon/ evening...

- How important do you think it is to tell people about the speed of broadband in adverts?
 - Why/ why not?
 - How would you feel if adverts did not mention speed?
 - Would it matter?
 - What assumptions would you make about the speed, if any?
- And overall, what do you think is the clearest way to talk about broadband speeds in adverts?
- Any questions?
- This research is being carried out on behalf of the Advertising Standards Authority. They are responsible for ensuring that the guidelines for advertising are met. They are interested in finding out what people think about broadband advertising relating to speed of broadband.
- Thank you for your time.

Thank and Close

3 Stimulus materials

3.1 Real life adverts

The following real life adverts were shown across stages 1, 2 and 3 of the research.

3.1.1 BT adverts

Across the research participants were shown three BT print adverts and one BT television advert.



BT INFINITY, NOW UP TO 52MB, FASTEST FIBRE SPEEDS AS STANDARD

SUPERFAST DEALS

UP TO 50% OFF BT BROADBAND

- £5 MONTHLY** (BT Line £12.99 monthly)
BT Broadband 50% OFF
• 12 month contract
- £10 MONTHLY** (BT Line £12.99 monthly)
BT Infinity 20% OFF
• Superfast fibre optic broadband
• 12 month contract
- £13 MONTHLY** (BT Line £17.99 monthly)
BT Infinity + BT TV 20% OFF BT INFINITY
• Up to 100 channels, 20 not on Freeview
• Free BT Sport included
• 12 month contract

0800 169 2998 or bt.com/broadband **BT**

All prices, BT TV and BT Sport content subject to change at any time during the contract. £49 activation for BT Infinity/£59 activation for BT TV Entertainment starter pack & BT Infinity. £7.95 delivery for Hub. Up to speed dependent on time of day, line and location. BT Infinity: 93% coverage across the UK. Check bt.com/infinity for availability.
BT Broadband/BT Infinity: No calls are included in these packages. This may affect your BT calling plan. For new BT Broadband customers that sign-up for 12 months and pay BT line rental. Both include SCB Cloud and a BT Home Hub. A compatible line required otherwise £30 connection charge may apply. If you leave in the first year, we'll charge you up to £85 towards the rest of your new Hub. Subject to minimum line speed and customer specification. BT Broadband: Price from month 13 currently: £15 a month. Period price: £22.00 a month on a 12 month term applied from 23.12.15 to 14.04.16. Includes a 1.2 GB usage limit. BT Infinity: Price from month 13 currently: £73 a month. There's a £49 activation charge (includes a 2GB usage limit). BT TV Entertainment Starter: £3 a month for 12 months. 12 month min term. £6 a month from month 13. £5 a month BT TV Entertainment applied 23rd April to 22nd December 2015. You'll need BT Infinity. Existing broadband customers must have 12 months remaining on your contract. If not you'll need to re-optimize your broadband. BT TV content subject to change at any time. Entertainment Starter includes 30 extra channels and a YouTube box. If you stop your service in the first year we will charge you up to £85. HDMI connection required. A 30m cable will be provided. £49 charge for an engineer install or £30 for Broadband extension, if necessary. Availability of digital channels and quality of content depends on local transmitter and suitable rooftop aerial (www.freeview.co.uk/availability). We'll charge you for on demand content and HD (Standard/low price) (times not included in your bill - add, you'll need to pay by Direct Debit. Subject to availability. Terms apply.

SPEEDY SAVINGS
PLUS **50% OFF** BT BROADBAND

50% OFF BT Broadband

£5 MONTHLY
BT Line £17.99 Monthly*

BT Broadband

- Up to 17Mb
- No calls included
- 12 month contract
- **£50 BT Reward Card**

20% OFF BT Infinity

£10 MONTHLY
BT Line £27.99 Monthly*

BT Infinity

- Superfast fibre optic broadband
- No calls included
- 12 month contract
- **£100 BT Reward Card**

20% OFF BT Infinity

£13 MONTHLY
BT Line £37.99 Monthly*

BT Infinity + BT TV

- Up to 100 channels, 20 not on Freeview
- Free BT Sport available
- No calls included
- 12 month contract
- **£100 BT Reward Card**

BT REWARD CARD

ONLINE EXCLUSIVE £50/£100 BT REWARD CARD

JOIN TODAY
0800 389 9410 or **bt.com/broadband**

BT

BT INFINITY, NOW UP TO 52Mb, THE FASTEST FIBRE SPEEDS AS STANDARD

All prices, BT TV and BT Sport content subject to change at any time during the contract. £49 activation for BT Infinity/£59 activation for BT TV Entertainment starter pack & BT Infinity. £7.95 delivery for Hub. Up to speed dependent on time of day, line and location. BT Infinity: 83% coverage across the UK. Check BT.com/infinity for availability. Comparison of BT Infinity 1 up-to 52 Mbps vs standard entry-level products of major broadband providers, Sky Fibre, up-to 38 Mbps broadband and Virgin up-to 50 Mbps broadband. Up-to speeds dependent on time of day, line and location. BT Broadband/ BT Infinity: No calls are included in these packages. This may affect your BT calling plan. For new BT Broadband customers that sign up for 12 months and pay BT line rental. BT line rental increases to £16.99/mo on 3 July. Both include SBC Cloud and a BT Home Hub. A compatible line required otherwise £20 connection charge may apply. If you leave in the first year, we'll charge you up to £55 towards the cost of your new Hub. Subject to minimum line speed and computer specification. BT Broadband: Price from month 13 currently £15 a month. Retailer price £10.00 a month on a 12 month term applied from 22.12.15 to 24.04.16. Includes a 12 GB usage limit. BT Infinity: Price from month 13 currently £21 a month. Includes a 20GB usage limit. BT TV Entertainment Starter: £3 a month for 12 months, 12 months min term, £9 a month from month 13. You'll need BT Infinity. Existing broadband customers must have 12 months remaining on your contract. If not you'll need to re-contract your broadband. BT TV content subject to change at any time. Entertainment Starter includes 20 Extra channels and a YouTube box. If you stop your service in the first year we will charge you up to £59. HDMI connector required. A 32cm cable will be provided. £49 charge for an engineer install or £25 for Broadband customers. If necessary, availability of digital channels and quality of content depends on local transmitter and stable working aerial (see bt.com/antennas). We'll charge you for an engineer install and HD/DVR/Cloud services (see offer) if not included in your first month. You'll need to use BT Broadband. Subject to availability. Terms apply. £50 BT Reward Card (BT Broadband)/£100 BT Reward Card (BT Infinity)/ £100 BT Reward Card (BT TV) ends 30th May 2016 and is available online only for new BT Broadband customers entering a Broadband package (£50 BT Reward Card, Infinity package) (£100 BT Reward Card) or an Infinity + BT TV package (£100 BT Reward Card) on bt.com. Excludes existing BT Broadband customers upgrading to BT Infinity. You must claim your BT Reward Card once your broadband is installed and within 6 months of placing your order on bt.com by entering your details on www.bt.com/broadband and must activate the card within 3 months of receipt. Following a successful claim, your card will be sent to the broadband installation address. BT Broadband & BT TV terms apply bt.com/broadband/bt.com/infiniti/bt-reward-card. BT Reward Card is issued by B. Bank & Sons plc, pursuant to license by MasterCard International Incorporated. RewardCard® and the MasterCard brand mark are registered trademarks of MasterCard International Inc. Reward Card is a UK Bank authorized by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (registration number 181332) and is permitted to take e-money. Head office and registered office at 19-21 Driffield Way, London W3 7EQ, company registration number 01186938. Subject to availability.



3.1.2 Plusnet adverts

Across the research depth interview participants were asked to visit the Plusnet website.

<https://www.plus.net/>

Business Broadband

plusnet We'll do you proud

Packages About Us Help & Support Member Centre Community Contact us

UNLIMITED[™] BROADBAND FROM £1.99 A MONTH FOR 18 MONTHS

18 month contract and £16.99** monthly line rental applies. ⚠

Go Unlimited >

Unlimited broadband Unlimited fibre Customer satisfaction YouView TV from Plusnet

i Our prices are changing

Our monthly line rental price will be £17.99 from 1st September 2016. We're making changes to some other prices and products, find out [everything you need to know](#).

3.1.3 Post Office adverts

Across the research depth interview participants were asked to visit the Post Office website:

<http://www.postoffice.co.uk/broadband-mobile/premium-unlimited-broadband>

The screenshot displays the Post Office website's header and a promotional banner. The header includes the Post Office logo, a search bar, and navigation links for 'Account Login' and 'Branch Finder'. Below the header is a red navigation bar with four main categories: 'Products & Services', 'My Post Office', 'Help & Support', and 'Quick Tasks'. A breadcrumb trail indicates the current page: 'Home > Broadband & Phone > Premium Unlimited Broadband'. The main banner features a green background with the word 'FREE' repeated in a word cloud style. The text reads: 'All the broadband you need FREE for 12 months'. A red tag graphic says 'Save up to £200 vs BT*'. Below this, it states 'Plus more money in your pocket with our low £16 line rental'. A red button at the bottom right says 'Get Unlimited Broadband'.

3.1.4 Sky adverts

Across the research participants were shown two Sky print adverts.

SKY BROADBAND UNLIMITED
£5
A MONTH
FOR 12 MONTHS

For Sky Broadband customers only. Monthly line rental £17.40 applies.

Sky Broadband Unlimited
£5 a month

- Half-price for 12 months, on a 12 month contract
- Speeds of up to 17Mb
- No usage limits and we'll never slow you down
- Available with or without Sky TV

Superfast Sky Fibre
£10 a month

- For 12 months, on a 12 month contract
- Speeds of up to 38Mb
- The most reliably consistent speeds, measured by Ofcom
- Available with or without Sky TV

Switch to Sky today
Search **'Sky Broadband'**
Or call **08442 411 862**

sky
Believe in better

Kung Fu Panda 3 © 2016 DreamWorks Animation LLC. All Rights Reserved.
Subject to status. Upfront payment may be required. Sky Network areas only. Selected Fibre areas only. Speeds vary significantly by location. Set-up costs may apply. £8.95 router delivery charge applies.
Sky Broadband Unlimited offer. Available to new Sky Broadband and Talk customers taking new 12 month minimum subscription for Sky Broadband. Sky Talk (30.00 per min) and Sky Line Rental (9.00 per min). After 12 months, standard price applies, currently £10 per min. Sky Talk and Sky Line Rental. Sky Fibre: Activation fee for new Sky Fibre customers currently £35 (standard fibre activation fee £50). Monthly usage cap: 48hr - 25GB. Most reliably consistent speeds. Delivered by Sky BT Partner & EE (Nov 2014). Ofcom excludes Wi-Fi performance, which varies by device, home environment & ISP. Sky Broadband general. Consult the terms and conditions for details. 1.21 connection charge may apply. For further information please see our website. Internal network as well as external congestion and fibre wiring can affect speeds. See sky.com for more details and our Usage Tables. Customers joining Sky TV with Sky Queue eligible for the £5 broadband only deal. Standard Sky Broadband includes Sky Line Rental separate contracts. Please see go.sky.com for more details and any terms required to go. See sky.com. Prices for Fibre, Delivered only. Offers not available in conjunction with other offers. Continuous broadband card available from 20p per min. UK residential customers only. Further terms apply. Call to Sky.com. To pre-join your provider's service charge. Offer ends 30 April 2016. Contact us at 10 February 2016.

3.1.5 Talk Talk adverts

Across the research depth interview participants were asked to visit the Talk Talk website:

[https://sales.talktalk.co.uk/product/broadband/simplybb?portalId=GOO_BRA#x=1&ds_kids=\[*KeywordID*\]&bg=b](https://sales.talktalk.co.uk/product/broadband/simplybb?portalId=GOO_BRA#x=1&ds_kids=[*KeywordID*]&bg=b)

The screenshot shows the TalkTalk website header with the logo, contact information, and navigation menu. Below the header is a navigation bar with links for TV, Broadband & Calls, News & TV Guide, My Account, Mail, and Help. A secondary navigation bar lists various services like SimplyBroadband, Essentials TV, Plus TV, Fibre Broadband, etc. The main content area features a large promotional banner for 'Totally unlimited SimplyBroadband' with a 'FREE for 18 months' offer (plus £17.70 monthly line rental) and a 'Limited Offer!' badge. To the right of the banner is an illustration of a blue Wi-Fi symbol and a yellow bucket with a shovel. Below the banner, the text 'Great value totally unlimited broadband' is displayed. Underneath, there are three product cards: 'SimplyBroadband Up to 17Mb' with a 'FREE for 18 months' offer, 'Fibre Broadband Up to 38Mb with Fibre Medium' with a '£5 a month for 12 months' offer, and another 'SimplyBroadband' offer. Each card includes a 'Check Availability' button.

TalkTalk Order online for our best deals
Or call 0800 049 1374 New to TalkTalk Existing Customer

TV, Broadband & Calls | News & TV Guide | My Account | Mail | Help

[SimplyBroadband](#) | Essentials TV | Plus TV | Fibre Broadband | Mobiles & SIMs | Move home | Security | Business Broadband

Totally unlimited
SimplyBroadband
~~£7.50~~
FREE
for 18 months
+ £17.70 monthly line rental

Limited Offer!

Check Availability

Great value totally unlimited broadband

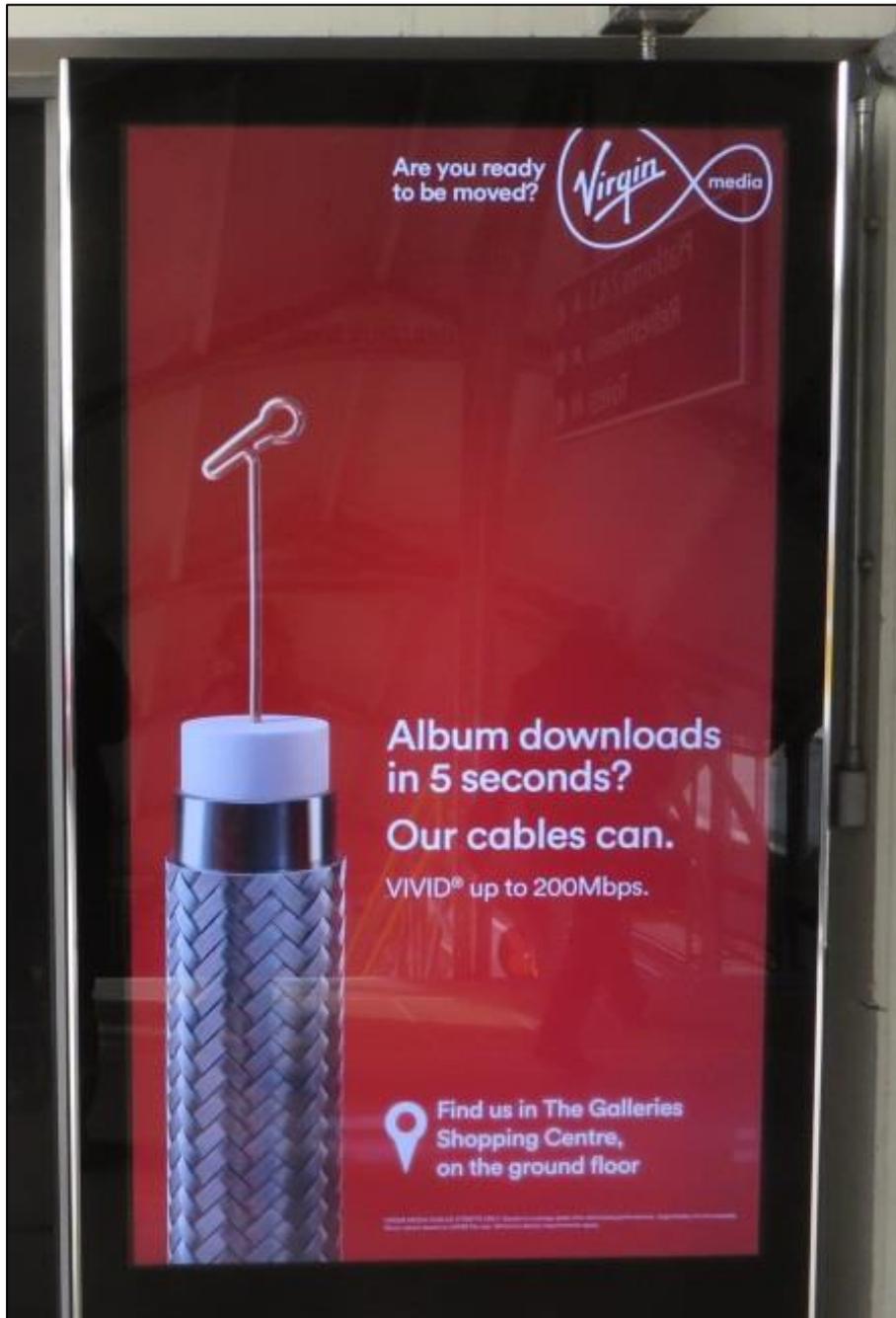
SimplyBroadband
Up to 17Mb
~~£7.50~~
FREE
for 18 months
+ £17.70 monthly line rental

Fibre Broadband
Up to 38Mb with Fibre Medium
~~£17.50~~
£5
a month for 12 months,
+ £17.70 monthly line rental

Check Availability

3.1.6 Virgin adverts

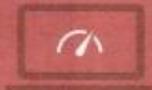
Across the research participants were shown three Virgin print adverts, one Virgin direct mail and one Virgin television advert.





Speedy.

Experience superfast internet speeds of up to 50Mbps and unlimited downloads with our **SuperFibre 50** broadband.



Easy.

Total telly control with **TiVo®** – record, pause and rewind live TV and access your favourite apps like YouTube™.



Streamy.

Get **Nexflix** on us for 6 months, for new series of the biggest shows and movies on your TV.



The **Big Easy** bundle

£15

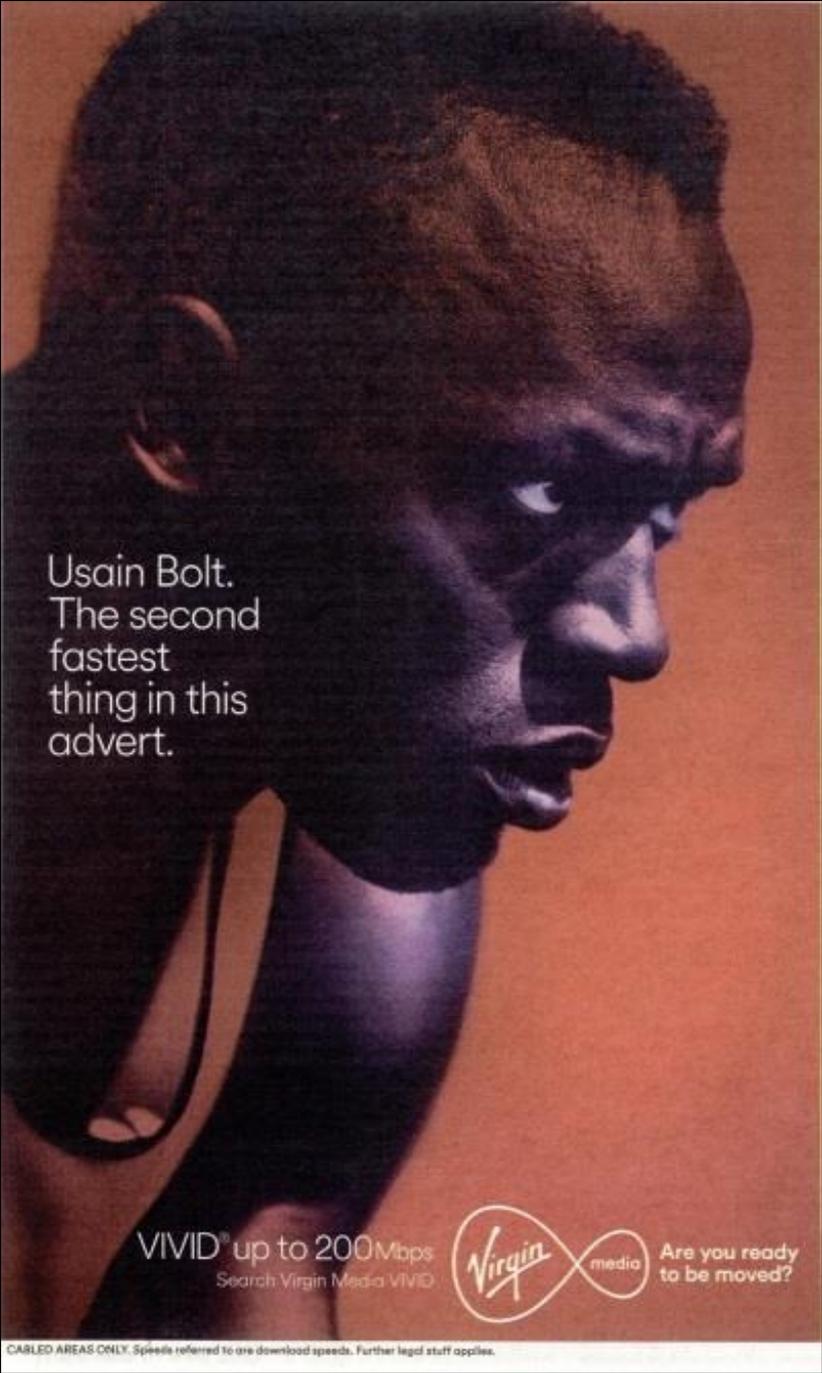
a month for 12 months then £24 a month.
Virgin Phone line £17.99 a month required.
18 month minimum term.

Get connected entertainment, join today.

0800 052 7675 | virginmedia.com | Virgin Media store

Virgin Media is now available to more homes in more areas.

Prices may change at any time during the contract. 18 month minimum term applies. VIRGIN MEDIA DARK FIBRE SPEEDS ONLY. Activation fee £3.95. Engineer installation fee £40. Subject to network capacity, status and credit checks. Check if your home is covered at virginmedia.com. 12 months' discount: New customers only. From £5 off cable bundle price a month, for first 12 months. Standard prices apply after 12 months. Virgin Media line rental fee £17.99 a month required. If you cancel during your minimum term an early disconnection fee will apply. Direct Debit and eBill price. Add up to 45p a month payment handling fee for non-Direct Debit payments and £1.70 a month for paper bills. May not be used in conjunction with any other offers except stated. Downgrading a service to your bundle may result in loss of bundle discount. If you upgrade any aspect, standard pricing applies to upgrade. We may withdraw or amend the discount if you change any part of your package. **Rediffra offer:** Available to new Virgin Media customers taking the Big Easy, Big Fast, Big Strong, Big Kulture, Big Kulture Movies, Big Kulture Sports, Big Kulture Sports & Music bundles and VP at up to 70 month minimum term. One another per household. Redeemable by Virgin Media account holder only. Must be redeemed by 31st December 2015. Subject to limited availability while stocks last, but can be withdrawn at any time. Offer is not redeemable or refundable for cash and cannot be exchanged for Netflix gift subscriptions or any other value. Limit of one promotion will be applied towards each monthly membership fee for your Netflix account. For details go to virginmedia.com/rediffra. Netflix's terms and conditions will apply (netflix.com/termsandconditions). This promotion excludes an offer for a Netflix standard plan subscription (2 streaming for 6 months, which currently costs £7.99 a month, or £44.94 for 6 months. For existing Netflix customers £44.94 will be credited to their existing plan. You may apply the value of the offer to a different plan. Exchanges in this manner may alter the duration of the offer. If you cancel you, Virgin Media cannot be downgraded to a bundle with a lower value within your minimum term contact we reserve the right to void this offer. **Blue:** This is a trademark or registered trademark of The Inc. and its subsidiaries worldwide. TV Content available dependent on TV package. **Download:** Speeds related to air download speeds. Downloadable size policy applies. Upload speeds may be affected by traffic management measures. There users may experience a temporary reduction in upload speeds. See virginmedia.com/traffic. Minimum computer requirements apply. Speeds assume equipment is of optimum speed and capacity. **General:** Virgin Media is expanding its cable infrastructure. See virginmedia.com/infrastructure for details. All information and prices correct at 20th April 2015 and are subject to change. Your first bill includes the charge for the month you join (from the day you join, plus one month in advance). Payment by post may be required in some areas. Calls may be recorded. Offers available until 30th June 2015. Further legal stuff applies. Go to virginmedia.com/legalstuff for details.



Usain Bolt.
The second
fastest
thing in this
advert.

VIVID® up to 200Mbps
Search: Virgin Media VIVID

Virgin media
Are you ready
to be moved?

CABLED AREAS ONLY. Speeds referred to are download speeds. Further legal stuff applies.



The Householder
[Redacted]

149133
[QR Code]

0010/0272277/04208
C0179L_D010/150473347 K37631

January 2016



Keep this reward card handy!

Hi,
You've been specially selected to get this exclusive discount, which is our best ever.

Good news, you qualify for our best ever exclusive discount. Right now you can get:

- Sky Movies – including all 11 channels in stunning HD
- Sky Sports 1, 2, 3, 4, 5 and Sky Sports F1*
- BT Sport 1, 2, BT Sport Europe and BT Sport // ESPN in HD
- Over 245 channels including Sky1, Sky Living, Discovery, Nickelodeon, MTV and FOX, plus loads more
- Free extra HD box – watch TV in a rather room
- Ultrafast internet speeds of up to 230Mbps

Get all of this for just **£44.99** a month for 12 months, £90 a month after that. Virgin Phone line £7.99 a month required.

This offer is not available to the general public, so be sure to quote 'Sports and Movies discount' with your reward card code when you call.

The Virgin Media team

Get all this included:

- ✓ 12 month welcome discounts
- ✓ An extra HD box on selected bundles
- ✓ HD channels at no extra cost*
- ✓ TiVo® box with no upfront cost on selected bundles
- ✓ No charges for repairs or call-outs*
- ✓ 14-day money back guarantee*

Call today

- Call 0800 052 1943
- Go to virginmedia.com/welcomediscount
- Visit us in store

Quote 'Sports and Movies discount'

Excludes Premium HD channels. 14-day money back guarantee. Includes 12 month welcome discounts and 12 month welcome offer. Call us on 0800 052 1943 for details. For a full list of terms and conditions visit virginmedia.com/welcomediscount. *Standard Virgin Media service. Virgin Media TV and Virgin Media Broadband services are available for this offer. Virgin Media TV and Broadband services are available for this offer. Virgin Media TV and Broadband services are available for this offer. © Virgin Media 2016



3.2 Stage 1 alternative speed claims and information

The following alternative speed claims and information were tested in stage 1 of the research

Up to speed claim plus explanation (at least 10% of customers):

This means that at least 10% of customers
can get the speed advertised

For example: 'up to 52mb' means at least
10% of customers can achieve 52mb

Up to speed claim plus range speed claim:

The advertised 'up to' speed should be available to at least 10% of customers and the advert should include information about the range of speeds that customers could achieve.

Up to speed claim plus 50% speed claim:

The advertised 'up to' speed should be available to at least 10% of customers and the advert should include information about the speed available to at least 50% of customers.

Up to speed claim where 'up to' relates to at least 25% of customers:

The advertised 'up to' speed should be available to at least 25% of customers

For example, 'up to 30mb' would mean that at least 25% of customers can achieve this speed.

Up to speed claim where 'up to' relates to at least 50% of customers:

The advertised 'up to' speed should be available to at least 50% of customers

For example, 'up to 25mb' would mean that at least 50% of customers can achieve this speed.

Up to speed claim plus additional information explaining that speeds may vary and directing consumers to an online speed checker:

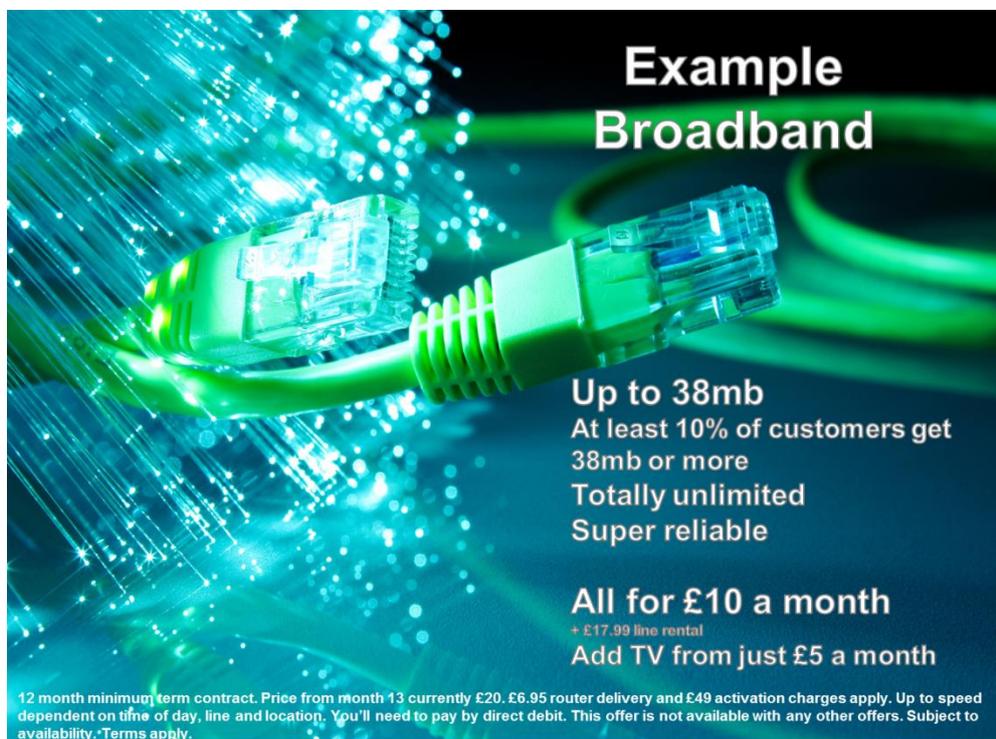
The advertised 'up to' speed should be available to at least 10% of customers and the advert should include information to explain that:

- **Speeds can vary depending on a number of factors.**
- **Customers can check the speed they would receive by going to the providers online speed checker.**

3.3 Stage 2 alternative speed claims and information

In stage 2, alternative speed claims and information were shown as mocked up adverts. Different versions were shown for ADSL, FTTC and Cable. For simplicity, FTTC versions are shown below.

Up to speed claim plus explanation (at least 10% of customers):



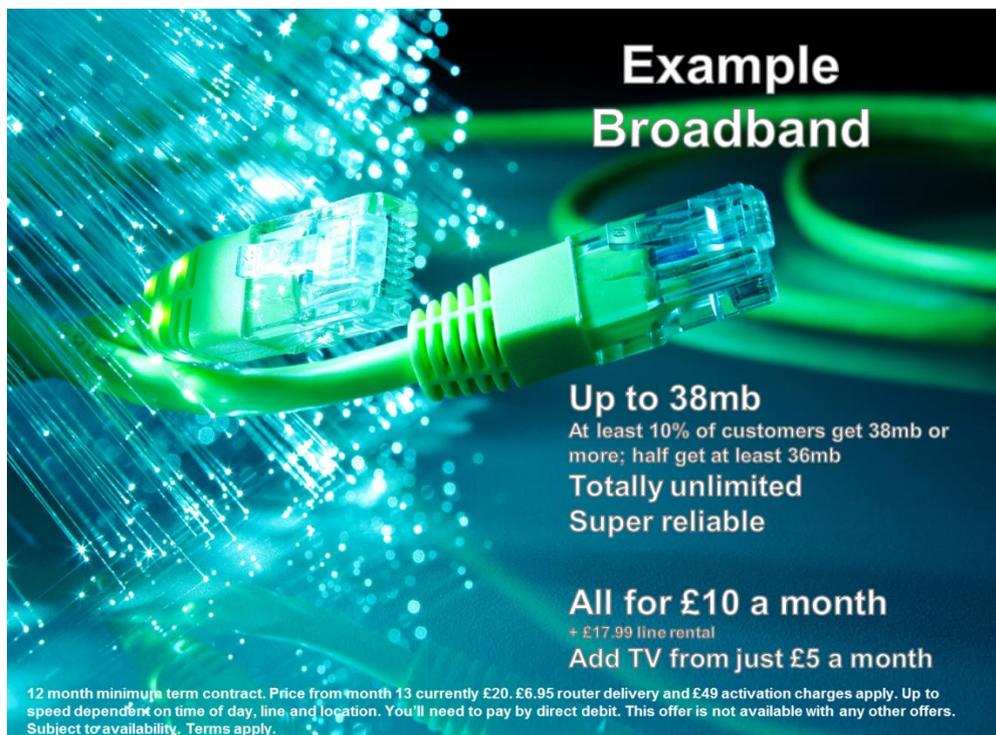
**Example
Broadband**

Up to 38mb
At least 10% of customers get
38mb or more
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental
Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Up to speed claim plus explanation plus average speed claim:



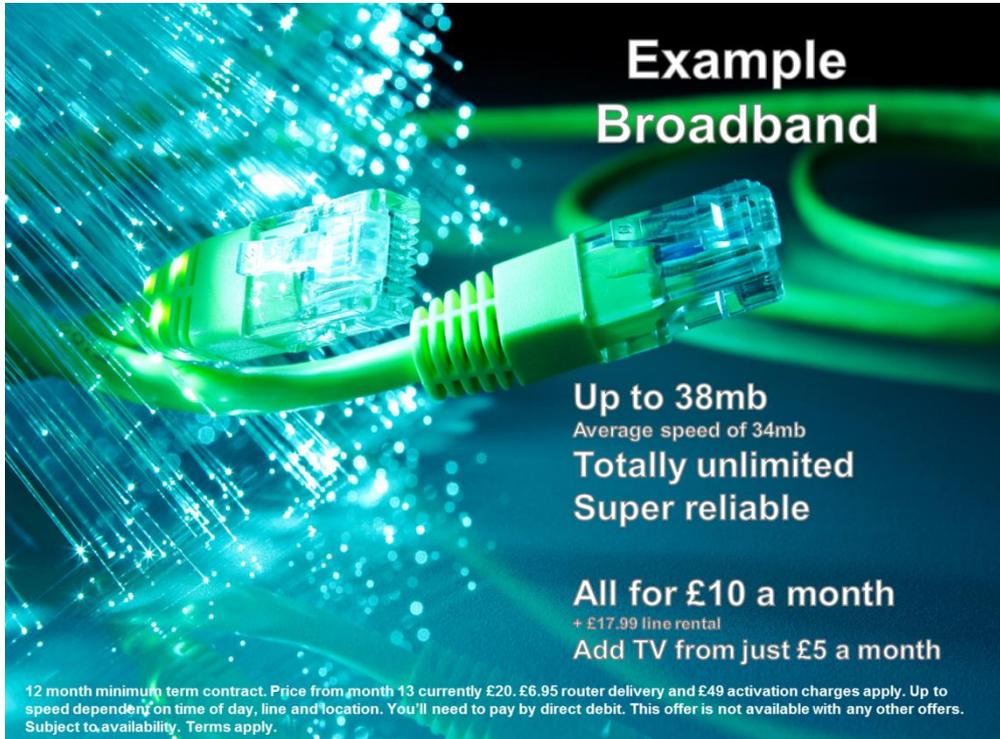
**Example
Broadband**

Up to 38mb
At least 10% of customers get 38mb or
more; half get at least 36mb
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental
Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Up to speed claim plus average speed claim:



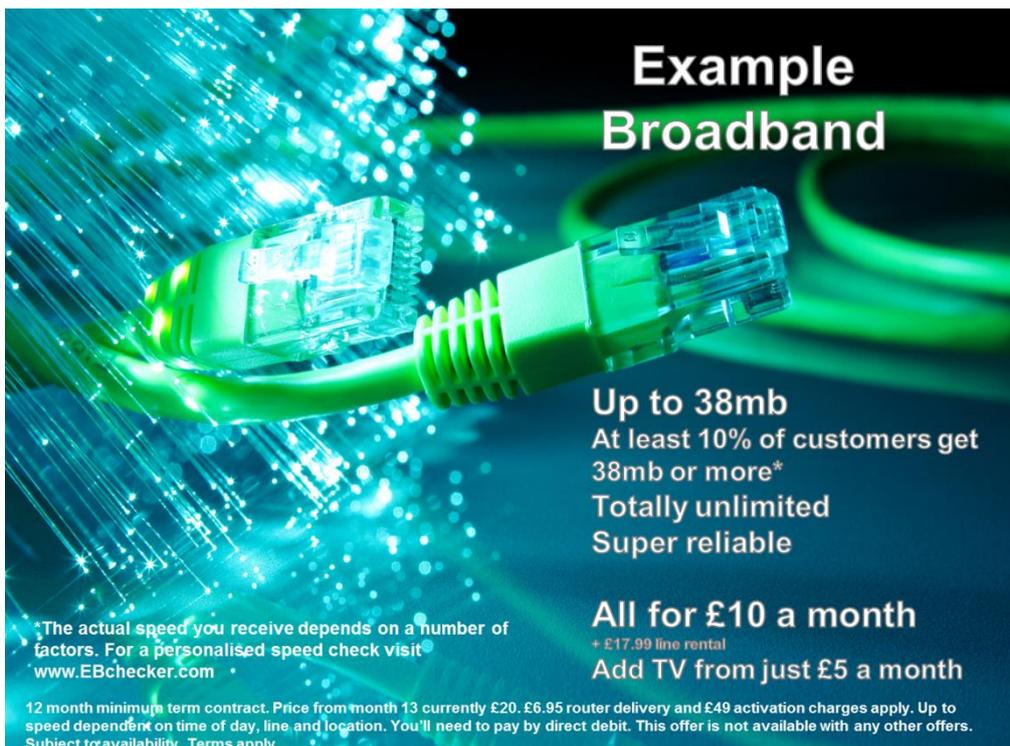
**Example
Broadband**

Up to 38mb
Average speed of 34mb
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental
Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Up to speed claim plus explanation, plus additional information explaining that speeds may vary and directing consumers to an online speed checker:



**Example
Broadband**

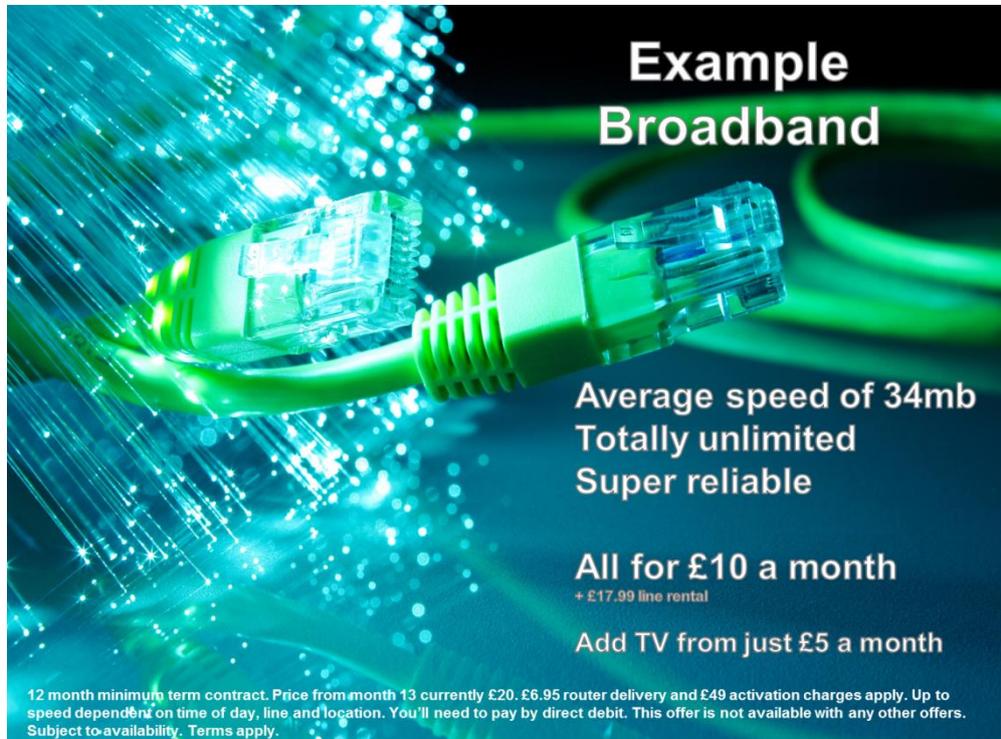
Up to 38mb
At least 10% of customers get
38mb or more*
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental
Add TV from just £5 a month

*The actual speed you receive depends on a number of factors. For a personalised speed check visit www.EBchecker.com

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Average speed claim:



**Example
Broadband**

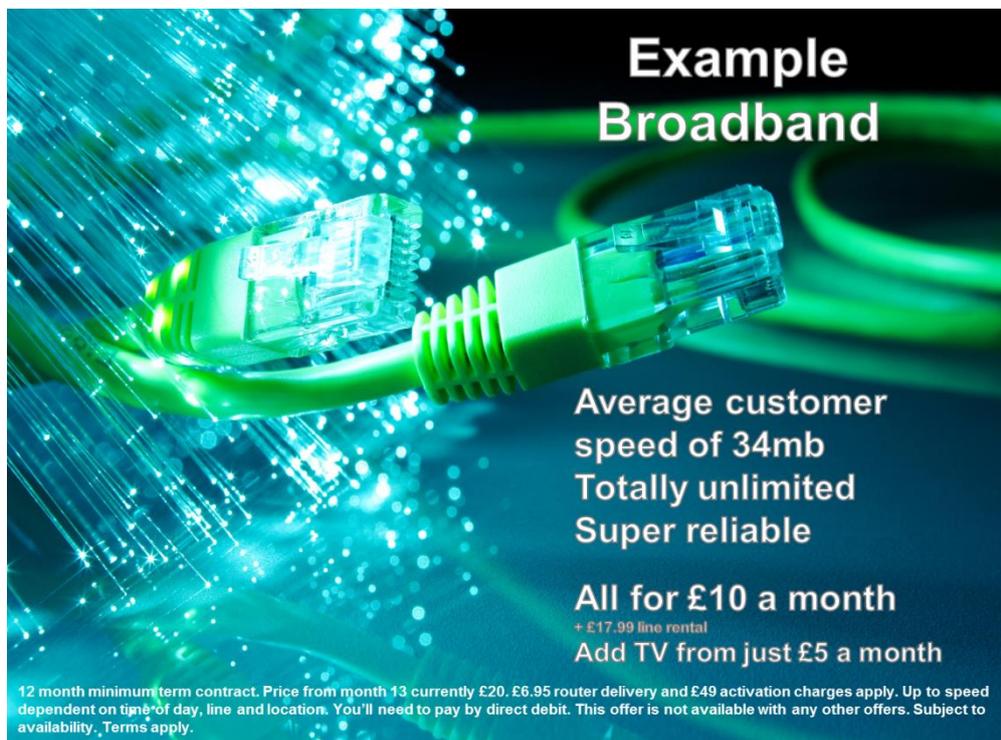
Average speed of 34mb
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Average speed claim including the word 'customer':



**Example
Broadband**

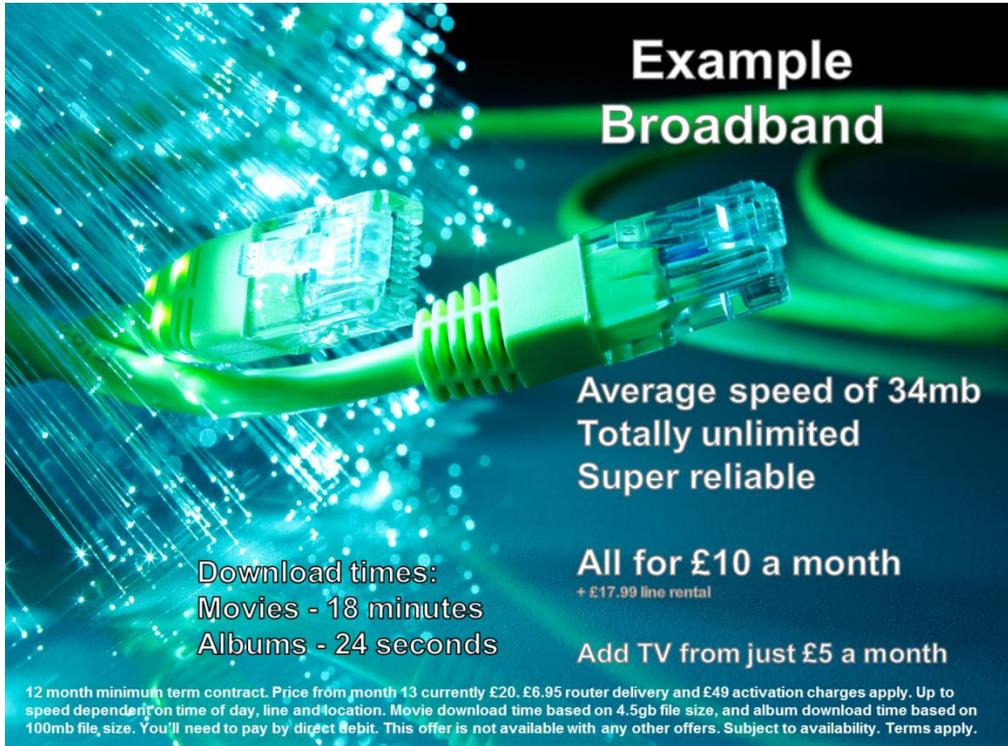
Average customer
speed of 34mb
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Average speed claim plus additional information detailing download times for different tasks (e.g. downloading a movie):



**Example
Broadband**

Average speed of 34mb
Totally unlimited
Super reliable

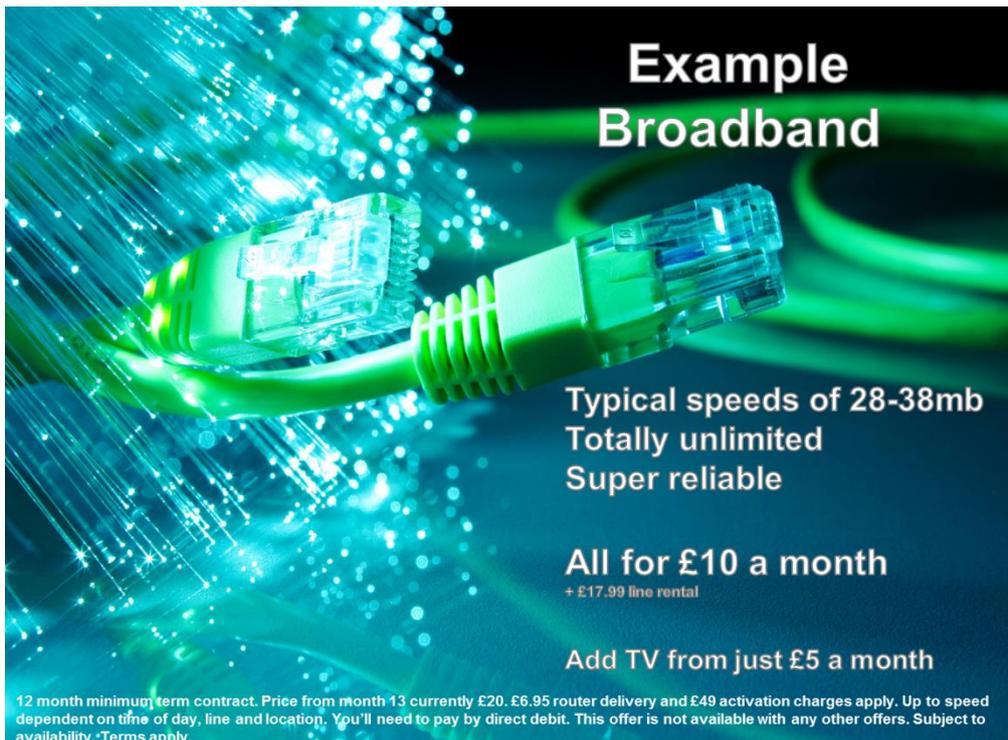
Download times:
Movies - 18 minutes
Albums - 24 seconds

All for £10 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. Movie download time based on 4.5gb file size, and album download time based on 100mb file size. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Range speed claim:



**Example
Broadband**

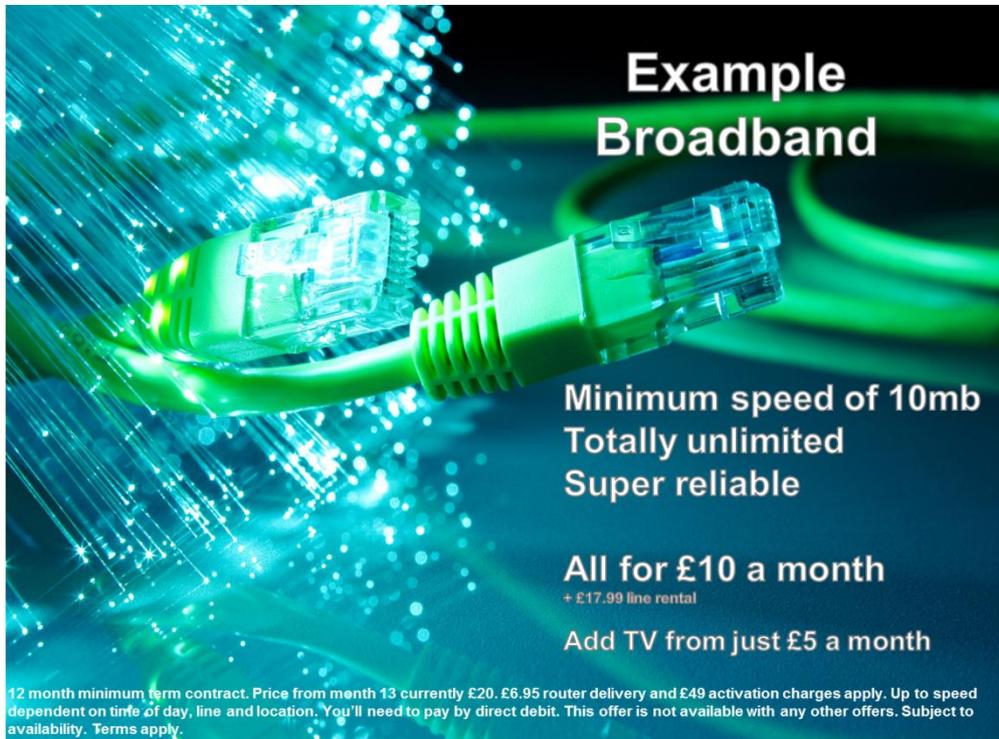
Typical speeds of 28-38mb
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Minimum speed claim:



**Example
Broadband**

Minimum speed of 10mb
Totally unlimited
Super reliable

All for £10 a month
+ £17.99 line rental

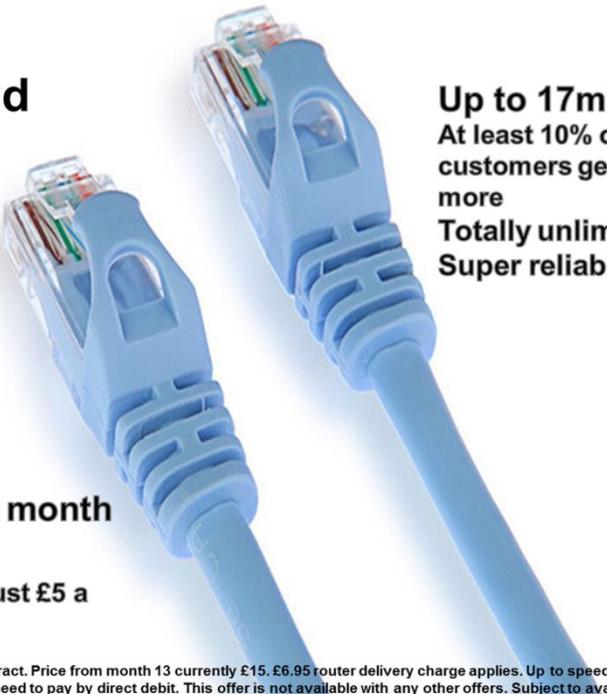
Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £20. £6.95 router delivery and £49 activation charges apply. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

3.4 Stage 3 alternative speed claims and information

In stage 3, alternative speed claims and information were shown as mocked up adverts. Different versions were shown for ADSL, FTTC and Cable. For simplicity, ADSL versions are shown below.

Up to speed claim plus explanation (at least 10% of customers):



**Example
Broadband**

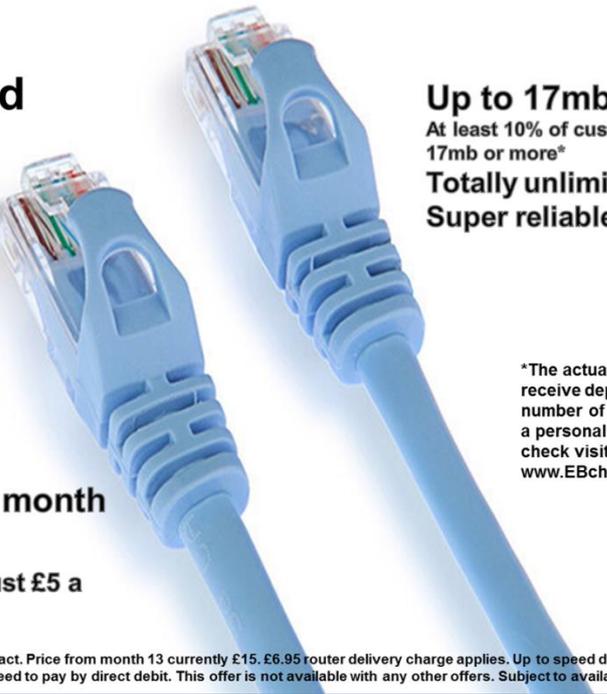
Up to 17mb
At least 10% of
customers get 17mb or
more
Totally unlimited
Super reliable

All for £5 a month
+ £17.99 line rental

**Add TV from just £5 a
month**

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Up to speed claim plus explanation, plus additional information explaining that speeds may vary and directing consumers to an online speed checker:



**Example
Broadband**

Up to 17mb
At least 10% of customers get
17mb or more*
Totally unlimited
Super reliable

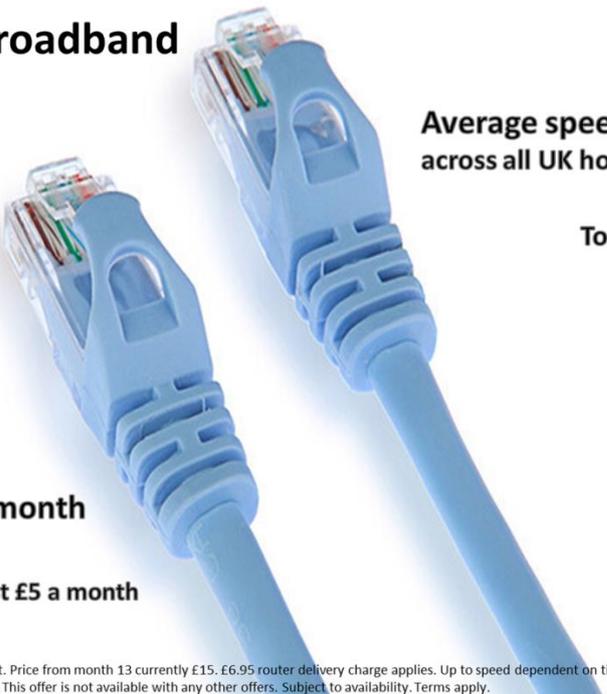
All for £5 a month
+ £17.99 line rental

**Add TV from just £5 a
month**

*The actual speed you receive depends on a number of factors. For a personalised speed check visit www.EBchecker.com

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Average speed claim including the phrase 'all UK households':



Example Broadband

**Average speed of 10mb
across all UK households**

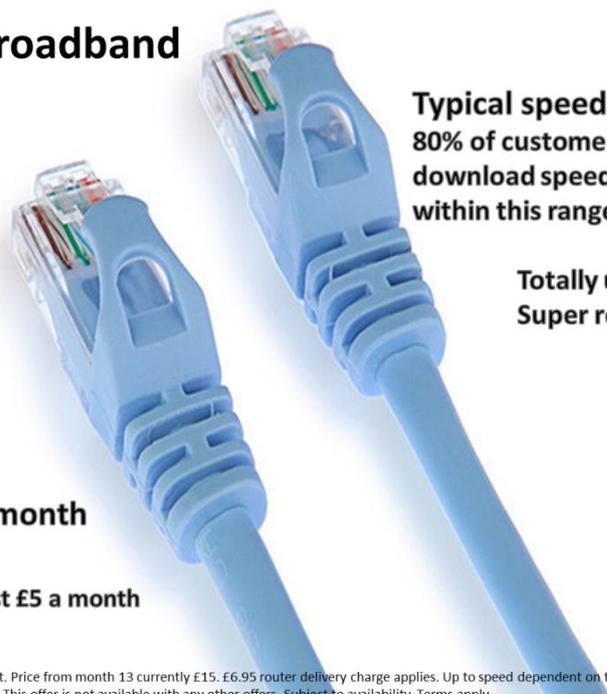
**Totally unlimited
Super reliable**

All for £5 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Range speed claim including explanation (80% of customers):



Example Broadband

**Typical speeds of 3-13mb
80% of customers achieve
download speeds that fall
within this range.**

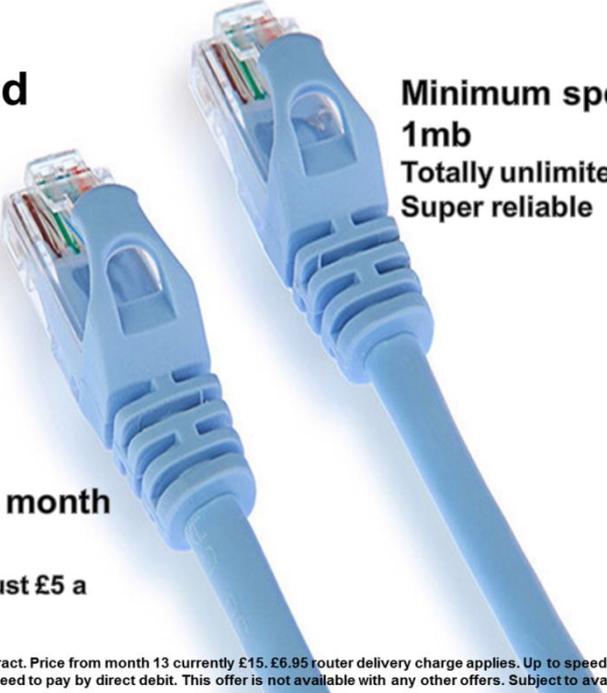
**Totally unlimited
Super reliable**

All for £5 a month
+ £17.99 line rental

Add TV from just £5 a month

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.

Minimum speed claim:



**Example
Broadband**

**Minimum speed of
1mb
Totally unlimited
Super reliable**

All for £5 a month
+ £17.99 line rental

**Add TV from just £5 a
month**

12 month minimum term contract. Price from month 13 currently £15. £6.95 router delivery charge applies. Up to speed dependent on time of day, line and location. You'll need to pay by direct debit. This offer is not available with any other offers. Subject to availability. Terms apply.