Broadband Fibre Qualitative Research
Final Report

November 2017

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I   Executive summary

This research report begins with an executive summary, highlighting key conclusions and findings. The report then outlines the full research approach, including the background to the research, the method taken, the sample interviewed and the stimulus materials used. Detailed findings are then reported, backed up with verbatim quotes from research respondents.

Summary of key points

The research shows:

- The term 'fibre' was not one of the priorities identified by participants when choosing a broadband package; it was not a key differentiator.

- The word 'fibre' was not spontaneously identified within ads – it was not noticed by participants and did not act as a trigger for taking further action. It was seen as one of many buzzwords to describe modern, fast broadband.

- Once educated about the meaning of fibre, participants did not believe they would change their previous purchasing decisions; they did not think that the word 'fibre' should be changed in part-fibre ads.

Background to the research: Project context, method and sample

- Qualitative research was undertaken to **review consumer understanding of the term 'fibre'** as used in broadband advertising (particularly for part-fibre services) and any impact the use of this term has on **consumers' transactional decisions.** This insight was required to help the Advertising Standards Authority (ASA) determine whether the term 'fibre' was likely to materially mislead consumers when used to describe part-fibre services[1].

- To conclude that the term 'fibre' is misleading in relation to part-fibre services, the ASA must be satisfied that this term would be likely to **mislead the average consumer** and would result in them **taking a transactional decision** that they would not otherwise have taken.

- Two stages of research were undertaken with a range of typical broadband consumers, covering different usage levels, socio-economic groups, gender, life stage and confidence with internet technology. In both stages, a 'bundle' of ads was shown to each respondent (either online ads, broadcast ads or non-broadcast ads).

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[1] 'Part-fibre' is used to describe Fibre-To-The-Cabinet (FTTC) and cable broadband. 'Full-fibre' is used to describe 'Fibre-To-The-Premises' (FTTP) and any sub-categories thereof.

- The method, scope and focus for each stage varied slightly to allow for learning across the project and comparison of data generated in different ways:
  - Stage 1 included pre-tasked 90-minute face-to-face individual depth interviews with 30 broadband users, covering purchase journeys, understanding of broadband terminology and reactions to advertising.
  - Stage 2 included 30-minute face-to-face individual depth interviews with 79 broadband users, focused primarily on reactions to broadband ads and the impact of the word 'fibre' within these.

Audience engagement with broadband, service priorities and the purchase journey

Overall, the level of engagement of participants with broadband services was low. This lack of interest contributed to low levels of understanding about the broadband market, to mixed understanding of terms used by broadband providers and to a relatively narrow focus when considering broadband offers that often excluded how broadband reaches a property (referred to in this report as the "delivery mechanism").

- Default engagement levels with their own household broadband services were low because participants generally did not want to spend more time thinking about their broadband than they had to. Their ideal service was a **seamless one that met their usage needs at an acceptable cost, so it could become invisible and forgotten in daily life.**

- They considered broadband to be an essential utility; like other utilities, this was both a boring and rather effortful purchase that involved comparing packages and trying to make sense of different offers that were hard to understand and compare.

- **Engagement levels and knowledge did rise when a broadband purchase journey was undertaken** (to select a new supplier or package) but once the purchase was complete and their home broadband service met their needs, it became seamless and invisible once more, and knowledge levels that might have risen temporarily, quickly dropped.

- When seeking a new broadband service, participants' priorities varied but the primary needs that most mentioned as key concerns included **reliability[2], speed, cost/value for money and data allowances**. Whether speed or cost/value for money was prioritised over the other largely depended on individual need; however, the majority of participants in the sample wanted a package that would meet their needs at the best price.

- Secondary priorities varied more but could include a bundle (for example, TV package), good customer service, brand preference or a short contract length.

- **Delivery mechanism, including fibre, was generally not spontaneously articulated as a priority when purchasing broadband**. This was partly because it is a layer of detail (and complexity) that the majority did not want to consider if it was not necessary: they were able to, and preferred to, reach a conclusion about the relevance of an offer based on

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[2] Reliability was generally understood across the sample to be related to speed (in many cases it was conflated with speed). See 2.1 for more information.

other information given. However, many participants also assumed that all main brands offered fibre, so delivery mechanism was also not important as a service differentiator.

- Participants were familiar with all of the major brands, with varying attributes attached to them. Participants tended to express a preference for familiar brands, meaning that many participants were spontaneously drawn to the most familiar brands.

Audience knowledge and understanding of the broadband market and terminology used within it

Participants tended to have a better understanding of the factors that were more important to them. Consequently, they understood less about 'fibre' than they did other terms. Knowledge gaps and very mixed understanding of other broadband terms appeared to be leading to a range of assumptions about the broadband market, as well as a general scepticism about broadband advertising, both of which influenced the impact of the word 'fibre' within advertising.

- Overall, while a few respondents in this sample were knowledgeable about the different aspects of broadband provision, most had a limited understanding.

- The following were relatively well understood:
  - Cost: Participants expected the presentation of cost to vary between providers and therefore expected to look at ads closely.
  - Reliability: This was known to relate to speed, and was seen as broadly meaning both a service with few or no connection outages, and a smooth service with no buffering. **However, respondents did not relate reliability to a fibre delivery mechanism in any way.**
  - Data allowances: This term was generally understood to mean the number of 'large items' one could download (such as films) or send by email (such as photos). However, participants sometimes lacked detailed knowledge, for example, how much data certain activities typically consumed, or of the differences between the units of measurement for data allowance and speed (MB versus Mb).[3]

- Individuals differed in relation to the specific aspects of broadband they were not aware of or misunderstood. However, their **lack of understanding was generally related to broadband delivery mechanisms and speed.**

- At its most basic level, 'speed' was understood as 'fast enough / not fast enough to meet my needs'. That is, from a consumer perspective, **speed is a qualitative measure of whether they are satisfied with the *quality* of their broadband service**, rather than a quantitative measure of what it delivers. Participants generally struggled to give a specific definition of broadband speed:
  - Most understood speed to relate to how quickly webpages loaded, files downloaded and whether streaming was smooth.

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[3] The units of measurement used to specify different data allowances were sometimes confused with those for describing speed, as the difference between mega- or giga*bytes (*MB / GB) of data and mega- or giga*bits per second* (Mb / Gb) for speed was generally not understood.

- Higher numbers were also understood to mean better speeds than lower numbers; for example, 70Mb versus 50Mb. However, the difference between Mb and Gb was not always understood, so participants did not – for example - always understand that 1Gb was more than 100Mb. Participants were also unsure what higher speeds would mean for their own home broadband, particularly when their **existing speed was seen as sufficiently fast to meet their current needs.**
- Respondents also understood that speed could vary according to factors such as location and how many others in the area were online, but many did not understand why this was the case.

- Knowledge about both the delivery mechanism of their current service and the range of services available varied quite widely across the sample, and **misunderstandings were common among participants** (for example, that Sky broadband was delivered via satellite dishes). Only a very few in the sample were able to define what fibre is; others offered a wide range of inaccurate definitions, variously and loosely covering a product, connection type, wireless access or service speed.

- When pushed on their understanding, **speed and fibre were perceived to be closely linked and participants often confused and conflated these terms**. Although approximately half of the sample was aware that fibre was a type of connection, the term was often seen as a current buzzword in broadband advertising.

- As fibre was thought to be a ubiquitous, generic term, it was also assumed to be offered by all main brands. As such, **the word 'fibre' did not generally provoke interest** in any but the most knowledgeable heavy users, who knew they needed it to get the speeds they required.

Use of broadband ads

Despite higher levels of trust in familiar providers about product and service, broadband ads were generally viewed with some scepticism, irrespective of the provider. This appeared to influence how broadband ads were used within the purchase journey and their overall impact.

- Scepticism was caused by a number of factors:
  - **Low levels of consumer knowledge** can reduce confidence in understanding what is being offered through an ad.
  - Providers were also all seen to be **offering similar products while claiming to be the best,** which led participants to assume that all providers were exaggerating or over-claiming. This assumption extended to full-fibre ads when these were viewed.
  - Participants also believed that providers were **not transparent about the true cost of their packages.** They were wary of hidden up-front costs, deals that became more expensive part-way through contracts and prices that rose once contracts were over.
  - Participants were generally aware that **advertised speeds were not generally guaranteed** and that speeds could vary according to a person's location and how many others in a local area were online.

- Consequently, participants reported that **seeing an ad could trigger the start of a purchase journey**. Their next steps would typically involve researching a number of different providers and packages, usually using multiple sources including price comparison sites, consumer reviews and provider websites.

Testing the impact of 'fibre' and other terminology in advertising

The word 'fibre' appeared to be relatively unimportant when participants deconstructed and interpreted broadband advertising. It did not appear to trigger the start of a purchase journey. In this context, 'fibre' tended not to be identified within ads either as an important element of a service or a key point of differentiation.

- When respondents were asked to consider the key points of each of the example ads shown in the research[4], **the creative elements were often noticed first, followed by cost**. After that, specific selling points of each ad as considered relevant to individuals were noticed, including speed. Fibre was rarely mentioned spontaneously when participants described an ad's narrative.

- However, on probing understanding of services being offered, **fibre was often assumed even when not mentioned specifically within an ad.** This appeared to stem from two factors: the belief that **fibre was offered by all providers** and fact that fibre was seen generically as shorthand for, or **synonymous with, 'modern, high quality broadband'**.

- When viewing full-fibre ads, only a minority of participants in this sample immediately understood that full-fibre providers offered something different. For most, their assumption that all providers offered versions of the same service, and all claimed to be the best, were factors behind full-fibre services not being differentiated and speed claims not being believed (i.e. they were seen as 'over-claim' from an unknown provider).

Impact of educating consumers about full-fibre services

On consideration of new information about fibre, participants did not think that the word 'fibre' should be changed in part-fibre ads.

- At the end of the research session in stage 2, the differences between ADSL, part-fibre and full-fibre services were explained, alongside the fact that full-fibre services are only available currently to a small percentage of the country but are likely to become more widely available in coming years. The benefits of full-fibre services were then explained.

- Participants were asked whether they could tell which ads referred to full-fibre services and which to part-fibre services, and about any changes they would like to see. However, even in light of this new information, many participants were unable to tell which ads were for full-fibre and which were for part-fibre services.

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[4] In all cases, respondents saw ads without being sensitised to the word fibre through contextual discussion (which happened after the assessment of ads)

- The explanation made some participants spontaneously re-examine their past purchase decisions and reconsider these in the light of new knowledge. **Almost all participants, however, concluded that they remained satisfied with their past purchase decisions** even with this new knowledge, as their current broadband package met their needs at an appropriate cost.

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II Introduction

A. Project background

The Advertising Standards Authority (ASA) is reviewing consumer understanding of the term 'fibre' as used in broadband advertising and any impact the use of this term has on consumers' purchase-related behaviour and decisions. It commissioned this research to help **determine whether ads which use the term 'fibre' to describe part-fibre services are likely to cause consumers to be materially misled.**

To conclude that the term 'fibre' is likely to mislead in relation to part-fibre services, the ASA must be satisfied that this term is likely to be misunderstood by the average consumer and is likely to result in them taking a transactional decision that they would not otherwise have taken (for example, making a further enquiry about a broadband package).[5]

B. Research aims and objectives

The overall aims of the research were as follows:

- **To establish what consumers understood by the word 'fibre' in the context of broadband advertising (and more generally)**
- **To understand whether the inclusion of 'fibre' in broadband ads shaped consumers' views of the performance of specific packages and, if so, in what ways**

To meet these objectives, the research needed to explore the following areas:

a) Broad, general understanding of 'fibre'[6]
- Consumer understanding of what 'fibre' means / is in the general context of broadband services.
- Any common misunderstandings around the term and what these are.
- Whether other terminology commonly used in broadband ads influences understanding of 'fibre', and, if so, how / in what combination (including specific terms related to speed and other common terminology that may be seen to relate to 'fibre').
- How understanding of 'fibre' might vary when used in different contexts (for example, in a brand name as opposed to as a descriptive term).

b) Customer journey to choosing a broadband provider and package/service
- Key considerations and factors influencing purchase journey (research process, sources of information and their relative importance).

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[5] The Consumer Protection from Unfair Trading Regulations 2008 (the CPRs) prohibit unfair business-to-consumer commercial practices, including misleading advertising. The likely effect of a marketing communication is considered from the point of view of the average consumer whom it reaches or to whom it is addressed. The average consumer is assumed to be reasonably well-informed, observant and circumspect. Marketing communications are misleading if they are likely to cause consumers to take transactional decisions that they would not otherwise have taken.
[6] For more detailed specific objectives, see Appendix 2

- How purchase decisions are made – which factors are key (impact of perceptions about provider, cost / value, speed, fibre, bundle / package, other factors).

c) The impact of using the word 'fibre' in broadband ads or price comparison websites
- What consumers understand when 'fibre' is used in specific ads or on comparison sites.
- Whether / how the inclusion of 'fibre' in ads or comparison sites influences consumers' understanding of the service offered.
- How, if at all, this influences their transactional decisions (purchasing a product or making further enquiries about purchasing a product).
- If they saw a particular ad, what action they would be likely to take.
- How all of the above varies (if at all) after education about what 'fibre' really is.

C.   Method, sample and stimulus examples

Method

A mixed method approach was used, comprising:
- **30 face-to-face depth interviews (90 minutes) in Stage 1.**
- **79 hall test interviews (30 minutes) in Stage 2.**

In total, 109 respondents were interviewed across the two stages.

Both stages addressed the main research objectives but the focus was slightly different for each. **Stage 1** interviews explored broad consumer understanding of broadband fibre, other terminology and purchase journeys, while also looking at these issues in the context of broadband advertising. **Stage 2** interviews focused mainly on advertising, teasing out the impact of the term 'fibre' and various other elements within the selected ads and websites advertising broadband packages.

All respondents in Stage 1 completed **pre-tasks** ahead of their interviews:
- Respondents who had recently switched their broadband provider or package were asked to complete a **'Customer journey diary'**, describing the reasons for switching, key considerations and priorities influencing their decision. It also focused on any resources they had used for researching different packages.
- Respondents who were considering changing their broadband provider or package were asked to complete an online **'Mystery Shop'** exercise, where they researched potentially relevant packages and noted down their considerations, priorities and any sources used.

The pre-tasks made the interview sessions more productive as respondents were **better prepared.** They were also an additional source of data to investigate consumer purchase journeys. Stage 2 respondents were not pre-tasked – this was to capture their **immediate reactions to ads** in a 'cold' state, i.e. before they became familiar with the topics under discussion.

In the interview sessions, respondents were shown a range of broadband ads and other content, representing a cross-section of broadband providers, media and formats (print, out-

of-home, direct mail, broadcast ad, provider websites and price comparison websites).[7] Some examples are shown below.

Stimulus material: examples of online ads / websites
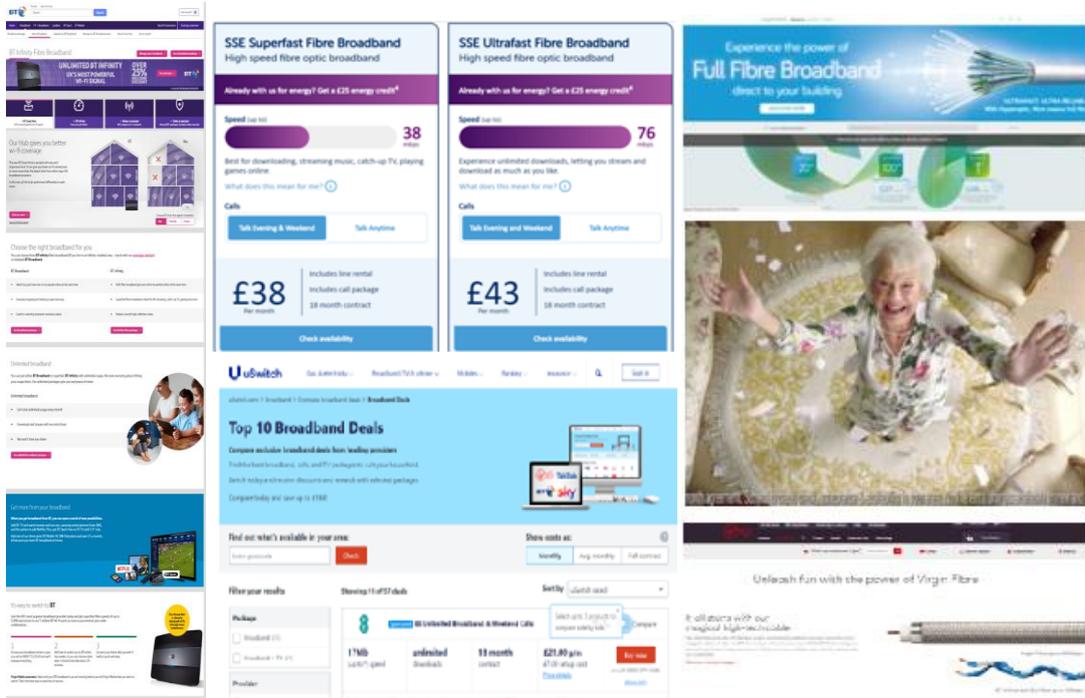
Stimulus material: examples of broadcast ads

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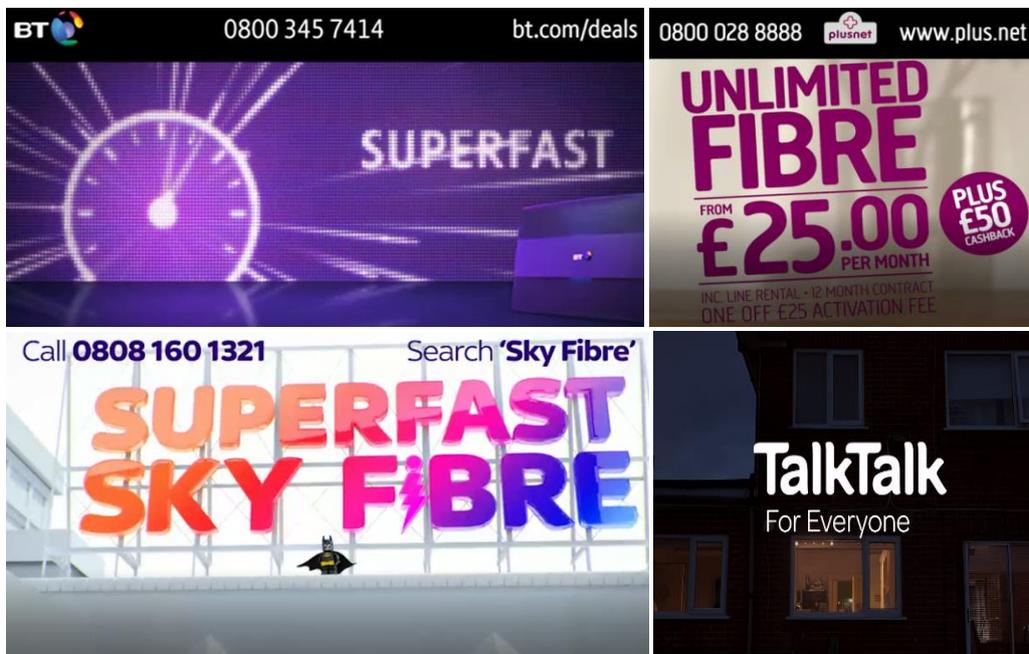
[7] For detailed information about the stimulus used and examples of ads shown to respondents, go to Appendix 1

Stimulus material: examples of non-broadcast ads

Sample

The **sample** was structured to reflect the following main criteria:

- All respondents were recruited to be solely or jointly responsible for broadband purchasing decisions.
- The sample was further divided evenly between those who had switched providers recently and those considering switching.
- In addition, the sample included a wide range of respondents in terms of the level of their broadband usage and current broadband providers, as well as a range of demographic criteria (life stage, gender, age, SEG, household size).[8]
- Locations were chosen to include a mix of rural and urban areas.

Locations

Fieldwork took place across 11 locations in England (Northampton, Norwich, York, Nottingham, London, Manchester), Scotland (Paisley, Glasgow), Wales (Swansea, Cardiff) and Northern Ireland (Belfast). Stage 1 fieldwork was conducted in July and August 2017 and Stage 2 fieldwork was completed in September 2017.

Team

The research team included: Joceline Jones, Caroline Hewitt, Danica Minic, Dulcie Denby-Brewer, Dawn Riding, Angus Smith and Alex Gibson.

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[8] For a detailed sample structure and criteria see Appendix 2

III Detailed findings

1. Audience engagement with broadband and the purchase journey

This section provides contextual information for understanding consumer attitudes to broadband, their typical purchase journeys and whether and how 'fibre' features within this.

The section begins by discussing the generally low consumer engagement with broadband identified in this research, as well as factors driving lower or higher engagement and the impact this has on consumer knowledge about broadband. It further outlines the primary and secondary priorities and needs of consumers with regard to broadband, how they inform the purchase journey and where, specifically, fibre fits within this. The section ends by discussing the role of advertising within the purchase journey and the steps consumers take when choosing their broadband service.

1.1 Engagement with broadband

Across different participants in this sample, **engagement levels with their broadband service were generally low**. Broadband was often perceived as a utility and therefore something technical and complicated, which made it uninteresting for many respondents. As a utility, it was also seen as a potential 'household chore' – something to organise and deal with if there were problems, so requiring time and effort.

> '*It's not something you think about as long as it works right' (f, family, Glasgow, C2DE)*

Most participants were, therefore, uninterested in thinking about their broadband service and only wanted it to work and meet their needs. Consequently, the ideal scenario for most participants appeared to be **a seamless broadband service that met their usage needs at an acceptable cost so it could become invisible and forgotten in daily life**.

> '*You say what do I think of my broadband service and honestly the answer is that I don't think about it any more than I think about my gas supply' (m, family, Northampton, BC1)*

> '*I only notice it when it runs slow' (m, 'empty nester', Paisley, BC1)*

The research did, however, also indicate that engagement levels were not always static. Instead, they could rise and fall for individuals depending on whether their needs from a broadband service were being met, and to what extent. Engagement with broadband could rise due to an unmet user need becoming more important. This need could then trigger an enquiry into different broadband providers packages and a purchase journey, during which time engagement levels would further rise as consumers gained more knowledge and compared different providers and packages. However, after a need had been met, i.e. a new provider or package had been chosen and successfully purchased, engagement levels quickly dropped again.

Diagram 1 (below) shows the typical pattern in terms of engagement levels which fall when broadband is perceived to be working well and rise in response to disruptive events when needs become more important:
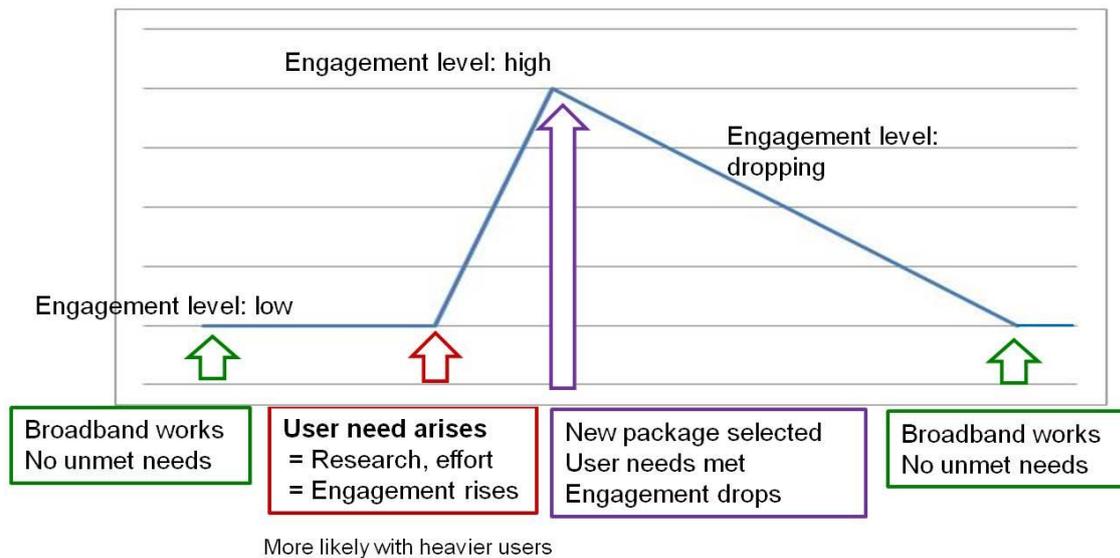
Diagram 1: How engagement levels can vary according to user need

Given the low engagement levels overall, user engagement only tended to rise in response to disruptive events (for example, as cited above, their needs from broadband not being met). Respondents cited a range of such events, some seen as negative and others as neutral or positive.

Negative events that triggered a purchase journey were often about poor quality of service - for example, the broadband speed or reliability no longer meeting user needs, or a poor customer service experience. In other instances, negative events were linked to the cost of the service - for example, a broadband provider raising the price of their package.

'I've been caught before with prices going up when you're out of contract so I always call them and say 'what will you do to keep me as a customer'. Last time I ended up upgrading to fibre because it was £2 cheaper' (m, retired, Belfast, BC1)

'I used to be with [provider] and it kept cutting out and the customer service was so dreadful, I had to keep phoning, being put on hold, so when the 18 months was up I just wanted to get away from [provider]; (f, 'empty nester', Swansea, C2DE)

A disruptive event could also be neutral or even positive. Examples given in the research sessions included a contract for a particular package ending, a new provider becoming available in a participant's area, desire for a different bundle such as an add-on TV or phone service or finding out about a 'better deal'/more relevant package through word of mouth or advertising.

'I talk to my daughter every day so for me it was about whichever one would give me the free calls too, I was only interested in them ones' (f, retired, Manchester)

The research also found that the **level of user need (i.e. usage) was a better predictor of differences in engagement level between participants than demographics or attitudes**. Those with lower needs included one- or two-person households who only used their home broadband for activities such as web-surfing, email, social media, online shopping etc. Those with higher needs may be in multiple-person households and using broadband for streaming media, downloading large files or gaming online. Consequently, the lower the need for speed and reliablility, the easier it was for broadband to be (seen as) seamless and invisible and the less need to engage with the service. This meant that lighter internet users tended to be the least engaged with their broadband package/provider.

> '*My husband uses it to look up information about other countries, he's very into that. I do quite a lot on it like I will look at Facebook and do email. We don't do anything like watch films though*' (f, 'empty-nester', Northampton)

Furthermore, the research indicated that low interest and engagement in their home broadband package also drove low knowledge about broadband. This was because respondents paid attention to their broadband only when necessary and, even then, within individual constraints around how much effort they were prepared to make.

> '*I know we've got BT but don't ask me to tell you anything more than that. It works fine and I'm happy with it, that's all I know. I don't want to fiddle with it*' (f, family, Cardiff)

1.2 Broadband usage needs and priorities influencing purchase journeys

The research identified a set of primary needs from a broadband service that were largely consistent across participants, as well as a range of secondary needs which varied depending on individual preferences and interests. These needs informed participants' priorities when choosing a broadband provider/package. **Most participants did not highlight 'fibre' either as a primary or secondary priority**, although there was some variation in how it featured in participants' decision-making, if it featured at all.

Given the overall need for a seamless broadband experience that allowed the broadband service to be ignored on a daily basis, participants singled out the following aspects of the service as their **primary priorities**:

- **Reliablility**[9], understood in terms of continuity of service with no loss of connection (and sometimes conflated with speed, particularly with regard to 'buffering'), was widely seen as a basic requirement for a functioning broadband service and thus most important. Even those respondents whose main focus was on the cost of service still needed it to work to meet their basic needs.

    > '*I say that the price is all that matters but obviously within that it does still have to work*' (m, family, Norwich, C2DE)

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[9] Reliability was generally understood across the sample to be related to speed (in many cases it was conflated with speed). See 2.1 for more information.

- **Speed and cost** were the next two key priorities determining the choice of provider and package for many. All wanted their broadband speed to be sufficiently fast to meet their household needs, whether they were lighter or heavier users. Cost considerations were more variable, as some prioritised the overall cost and wanted an inexpensive service, whereas other looked for getting 'good value for money'. In addition, some were wary of hidden charges on top of their monthly payments. Respondents, however, varied in whether they saw speed or cost as more important depending on how heavy their usage and/or how cost-oriented they were.

- **Data allowances:** Many also wanted to avoid any capping and unexpected bills if they exceed their data allowance so placed importance on having unlimited broadband/sufficient data for their needs.

    'I would always look for 'Unlimited' so you don't get a nasty surprise at the end of the month' (m, retired, Northampton, BC1)

For most respondents, 'fibre' did not feature as a primary priority, even if some linked it to speed. In terms of making purchase decisions, fibre was sometimes seen as a means of getting higher speeds, but it was speed itself that was the priority, rather than how it was delivered. Typically, the heaviest internet users who did a lot of streaming, downloading or had multiple users in their household knew they would need a fibre service to achieve the speed they wanted, but speed was still the primary consideration.

Conversely, medium and lighter users did not prioritise fibre as part of their purchase journey but were rather driven by various personal preferences (provided the package met their needs in terms of speed and cost). Diagram 2 (below) shows these differences in participant priorities in the purchase journey, with respondents varying in terms of how much they prioritised speed versus cost and what impact that had on their consideration of fibre.
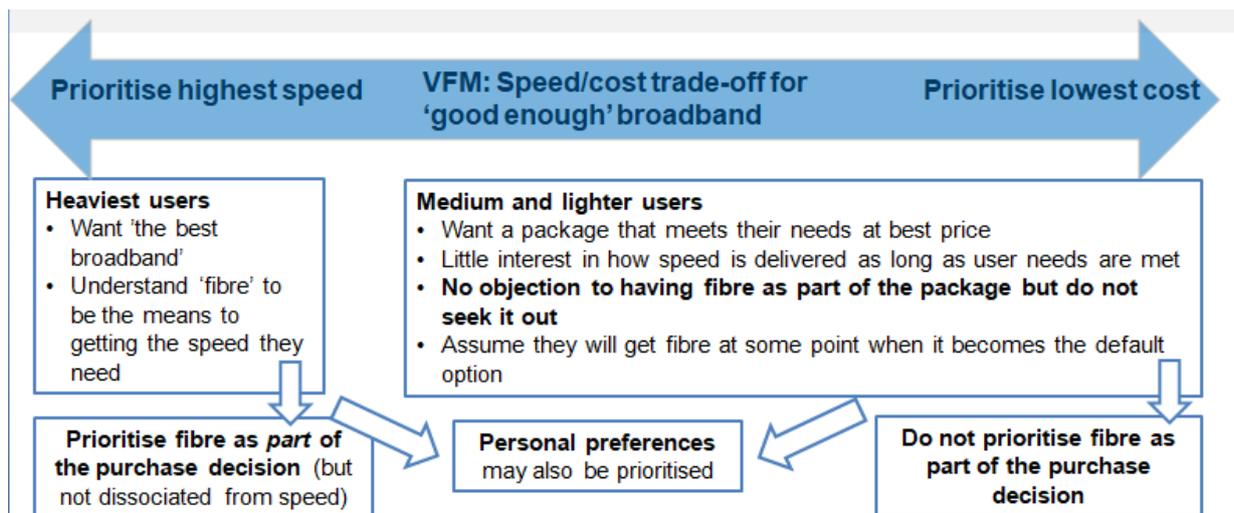
Diagram 2: How participant priorities in the broadband purchase decision vary according to level of use

When respondents were satisfied that their primary needs would be met by a broadband provider/package, their own personal preferences and needs came into play. These **secondary broadband needs** varied widely and appeared to be a differentiator among participants. The importance attributed to these different secondary needs stemmed either from lifestyle interests (for example, particular TV content) or tended to be determinedby previous personal experience with a particular provider.

The following secondary needs were most frequently cited:

- **Brand-related** preferences were sometimes expressed and related to expectations around quality and added value/additional services. In particular, well-known brands were more trusted and seen as more reliable service providers than less known brands, even if specific perceptions of major broadband providers varied. This tendency sometimes influenced the impact of broadband advertising, as participants were sometimes more cautious about trusting the lesswell-known brands.

    'You want to go with a big name, you know there's a certain minimum quality there or you'd hope so' (m, 'empty nester', Norwich, C2DE)

- **Customer service**, particularly where respondents had a poor customer service experience previously, which can make it into more of a priority.
- **Bundle packages** (for example, TV package, free landline calls, deals on additional products such as mobile phone) were key for some participants but unimportant to others).
- **Contract lengths** were also mentioned quite frequently across participants as many preferred the shorter contracts to allow them to change their provider should they need or want to.

'Fibre' was not articulated as a secondary priority explicitly. Respondents often assumed it was offered by all main brands (see Section 2 for more detail around these assumptions).

1.3 The role of advertising and online information in the purchase journey

Individual ads across different channels and formats, as well as online information available on broadband providers and price comparison websites, all played a role in the broadband purchase journey, albeit in different ways. Respondents typically saw ads as something that could spark their interest and trigger an enquiry into different broadband packages, whereas online information was sought for detail to help with the purchase decision.

When discussing their views on broadband advertising generally, participants displayed a degree of scepticism. Respondents had different reasons that led them to view the ads in this way, including a combination of issues related to perceptions of transparency in advertising, the perceived similarity across providers and potential over-claiming of benefits, and awareness of variability of consumer experiences when compared to claims in ads.

There was a general perception across participants that broadband providers were sometimes not as transparent as they would like about the true cost of their packages. Participants were

wary of some costs not being included overtly enough within the advertised prices of packages. These included up-front deals that become much more expensive part-way through contract, costs such as one-off installation costs, delivery costs and other up-front charges, and an increase in costs once the contract was over, usually without warning.

> *'They'll advertise cashback but then you find out you can only claim it once you're three months in, and you have to write to them, and then wait another 28 days – they make it as hard as possible for you' (m, young, no dependents, Norwich, C2DE)*

Many were further under the impression that most broadband providers offered similar products at comparable costs with only small, superficial differences between comparable packages.

All providers were also perceived to **claim to be 'the best' in some way, which led participants to assume a degree of over-claiming** in ads. For example, the abundance of claims about speed across different providers, all of which promised a variant on 'fast', 'superfast', 'ultrafast' or 'the fastest' broadband, contributed both to seeing most providers as offering a similar service and the sense of over-claim because, logically, they could not all be the fastest. As a result, the claims around speed in broadband ads by full-fibre providers were also perceived through this lens.

> *'They're all the same really, it's just variations on the same theme. I think they all use BT's lines anyway so they must be the same' (m, family, Manchester)*

Many respondents were also aware that not all consumers received the same speeds from the same package. Awareness of reasons for this was patchy but some knew that the location and the number of other users in the local area who were online at the same time could affect speed. Some were also aware that ads provided 'up to' speeds rather than the actual speed, making them question or worry what their broadband speed might be in reality. Advertised speeds were therefore often seen as a best-case scenario, which sometimes created further scepticism about provider claims.

> *'I know it depends where you live, you can have good service in one place and two streets over its bad' (f, family, Northampton, C2DE)*

> *'When you buy it, it says a certain speed but that's not always what you get. Around here it dips at about 4pm and I think that's the kids getting in from school and going online' (m, family, Belfast, C2DE)*

For all these reasons, individual ads were not seen as sufficient to make a purchase decision. However, participants reported that ads sometimes prompted them to think about changing their broadband provider and/or undertake further research into their options.

Most respondents reported that they researched different broadband options online, although a few also telephoned or visited shops or asked friends and family for advice. Respondents' accounts of their research steps suggested that participants were often quite thorough in their research processes, using multiple sources, including ads, and taking their time before making purchase decisions.

> *'I saw that [Plusnet ad] and it made me think, I am probably paying too much for the internet and I should look around...just because I saw the PlusNet doesn't mean it's the best thing out there' (m, family, Norwich, C2DE)*

Most cited the following websites as typically used for an initial scanning of broadband options online:
- Google (where some would use search terms such as 'best broadband UK').
- Price comparison sites, such as uswitch.com, comparethemarket.com, moneysavingexpert.com.
- Consumer reviews (to read about actual experiences of other consumers).

> *'I narrow it down with the Martin Lewis site then I look for reviews that are about broadband in my local area' (f, 'empty-nesters', Swansea, C2DE)*

Depending on their findings during this initial search, participants would then rule out some providers or packages, and narrow down potentially interesting options. To help with the purchase decision, many then looked at specific packages in more detail using broadband company websites and comparing the packages of interest, their prices, any bundles and benefits offered etc. Respondents who were less confident in judging different packages sometimes also consulted friends and family or telephoned to get additional advice or buy, but most subsequently purchased their new broadband package online.

2.   Audience knowledge and understanding of broadband terminology

This section provides a broad overview of the levels of consumer knowledge about broadband and their understanding of specific broadband terminology, including fibre.

Over the sample as a whole there were high levels of variability in terms of knowledge and understanding of various technical aspects of broadband, and in the meanings of common broadband terminology. A small minority of respondents had a very thorough understanding of all technical aspects of broadband, including fibre, and made decisions accordingly. A further small minority had very low understanding and struggled to articulate the meanings of most terms associated with broadband. **This was not limited to having little understanding of 'fibre' but persisted across all aspects of broadband technology.**

The majority of respondents had some understanding of some aspects of broadband and the meaning of some terminology – however, most also showed some fundamental misunderstandings. **What they understood and what they misunderstood was not consistent across respondents – this impacted on their understanding of 'fibre'**, both within ads and in isolation, for example, when considering purchase decisions.

Diagram 3 below illustrates this.
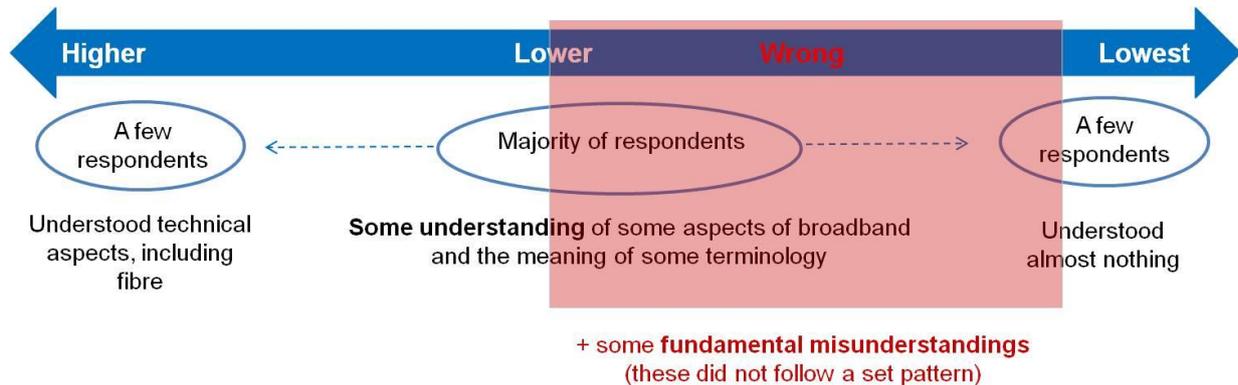
Diagram 3: Overview of different levels of understanding of broadband

Very different levels of knowledge about broadband and their own broadband packages emerged across the sample.

- A small number of participants with very low knowledge knew little more than the name of their provider - they were unsure of their package's speed (advertised or actual) and were unsure whether or not they had fibre.
- The majority of the sample however knew the name of their provider, approximately what the advertised speed of their package was, and whether or not they had fibre (this was not the same as understanding what fibre was).
- A small number of highly knowledgeable participants in the sample were able to articulate full details about their package, including having checked their actual speed versus advertised – this was usually prompted by a bad experience, i.e. broadband perceived to be running slowly.
- Seven respondents in total (of 109) knew full details about fibre, including the differences between full-fibre and part-fibre services.

> *'I knew I wanted Virgin because their fibreoptic service can go up to 200Mb which is the fastest I can get in my area. Their cables are better than the copper wire, and there's some fibre to the box in the street which makes it faster' (m, young, no dependents, Glasgow, BC1)*

Beyond consumer engagement with broadband, which influenced how much they knew, the research **did not find any other set patterns in terms of factors influencing consumer knowledge about broadband**. Most demographic factors did not appear to affect levels of knowledge and understanding or broadband use. Instead, the overall picture was one of variability and inconsistency. For example:

- Some respondents understood 'fibre' as a delivery system implying faster speeds, without understanding the meaning of other broadband terminology.
- Others did not understand fibre at all but had a good understanding of other aspects of broadband technology.
- Yet others were able to articulate good, broad understanding when terms were discussed in isolation of an advertising context, but misunderstood the implications of the same terms when they were used in ads.

Beyond such variations in knowledge, certain aspects of broadband technology and terminology were better understood than others.

Consumer understanding of these different terms is outlined in more detail below.

2.1 Reliability

Respondents did not relate reliability to fibre delivery mechanism in any way. Reliability was however generally understood across the sample to be related to speed, and in many cases it was conflated with speed.

Typically, a reliable broadband service was understood in terms of:

- Having **few or no connection outages** (i.e. the 'correct' measure of reliability).
- Being smooth with **no 'hanging' or 'buffering'** (a consequence of slow speeds).

> *'It didn't used to be reliable because when I tried to watch YouTube videos I'd get you know that little blue circle and it would freeze, and that happened a lot which is why I changed over to Virgin and now it doesn't pause at all' (f, retired, Cardiff. BC1)*

> *'Reliability is how often it drops out or goes offline, so if it's always online, it's reliable' (f, family, Northampton, C2DE)*

Regardless of respondents' internet usage level, having no outages and little buffering were both seen as key priorities for a broadband service – these were the **bare minimum standards** by which participants judged whether or not their broadband 'worked'.

2.2 Cost / value for money

Many participants in this sample had a reasonable understanding of the different type of costs associated with a broadband service.

The research highlighted some variation in terms of consumer attitudes to cost, as some were focused on paying the lowest possible prices while others were focused on getting value for money. A consumer could be price-focused and still prepared to pay a relatively high monthly fee, as long as this was perceived to be giving good value and meeting needs (even if they were basing that decision on a misunderstanding of how those costs were calculated).

> *'I do pay quite a lot, I pay £40 per month but it's with Virgin so I don't pay line rental because it's cable. That was important to me. I don't mind paying £40 but I want to get the full value for that, so the highest speed I can get and no extras' (m, young, no dependents, Glasgow, BC1)*

Most were aware of a number of potential elements of broadband service costs. These included costs per month including line rental, introductory per-monthly deals (for example, half price for first six months of contract), up-front offers (for example, cashback, free gifts, bundles at lower cost), and up-front costs, for example, installation fees.

The research further indicated that **focusing on the cost of broadband service could impact on how participants view broadband ads**. As cost was highly relevant to many, ads viewed in the interview sessions tended to be scrutinised for costs which sometimes led to other aspects of advertising receiving less attention.

> '*You've got to read the small print. If there's a good deal, they'll charge you later down the line*' (f, 'empty nester', Swansea, C2DE)

2.3 Data allowances

Data allowances were broadly understood, even if some respondents lacked detailed knowledge.

Most participants were generally aware that some online activities (for example, downloading) used more data than others (for example, browsing). However, more detailed understanding varied depending on the extent of their internet usage:

- Heavier internet users were more likely to prioritise having a broadband package that allowed for **unlimited usage**. They understood that this was to avoid capping or incurring additional costs if they exceeded their data allowance.
- Lighter internet users, in contrast, were often unsure of their own data allowances and whether or not they had an 'unlimited' package. **Data allowances were, overall, not something they explicitly considered or thought about.**

> '*I just don't want any hidden costs or charges, so the download allowance is big. And some of the films on HD are like 4GB*' (m, family, York, BC1)

In addition, some details regarding data allowances confused participants across the sample. The units of measurement used to specify different data allowances were sometimes confused with those for describing speed, as the difference between mega- or giga*bytes (*MB / GB) and mega- or giga*bits per second* (Mb / Gb) was generally not understood.

In addition, some also did not understand the difference between 'mega' and 'giga', that is, **'giga' was not always understood to mean higher than 'mega'**. This confusion sometimes impacted on how respondents viewed different broadband package offerings. For example, some wrongly believed that 1Gb speeds offered by full-fibre providers were actually slower than Mb speeds offered by part-fibre providers.

2.4 Broadband delivery mechanisms

Broadband delivery mechanisms were not something most respondents thought about and were not seen as a priority. Overall, participants saw broadband speed as a priority rather than how it was delivered, which also meant that fibre as one of the delivery mechanisms had low importance.

The lack of engagement with delivery mechanisms meant that few had considered this aspect, although there was again some variation depending on how knowledgeable respondents were

in general about broadband. Some respondents with higher overall knowledge referred to copper wires and phone lines when probed around how their broadband service was delivered to their house.

> '*How it's delivered? It's the wires, the phone line I think? Is that right?*' (m, retired, Nottingham, BC1)

A few respondents also talked about the service being delivered to and from street cabinets and into their house (although terminology they used to refer to street cabinets varied). Those with lower overall knowledge of broadband had little understanding of the delivery mechanisms too, but also little interest to find out about them.

> '*I believe it's through the green boxes you see dotted around the streets*' (m, family, Nottingham, C2DE)

The research also captured a range of misunderstandings in terms of how participants imagined their broadband service was delivered to their house, including confusion of broadband delivery mechanisms with masts, TV aerials, satellite dishes and so on.

> '*I wouldn't touch [provider] for internet because I don't want a satellite dish on the side of my house* (f, 'empty nester', Manchester, C2DE)

When probed around what they knew about how different broadband providers delivered internet service, there was little knowledge beyond a broad awareness that Virgin used a different delivery mechanism (although detailed knowledge varied). Most respondents, therefore, knew:

- Whether or not Virgin Media was available in their area.
- That Virgin did something different because they had to 'dig up the street'.
- That digging was due to laying some type of cable.

> '*Virgin's underground. They have Virgin next door and they were digging up underground so that must be coming from a different place*' (m, family, Manchester, BC1)

These beliefs were often reinforced when participants viewed Virgin ads, particularly those that used creative elements to highlight the differences in delivery mechanism. For example, references to a 'magical cable'[10], showing a sleek, modern-looking coaxial cable, particularly when visually contrasted with images of copper wires. Various other creative elements also suggested the highest speeds – for example, in the broadcast ad used in the research, use of Usain Bolt, a car chase and fast-paced cinematic music all suggested high speeds.

2.5 Speed

Broadband speed was often well-understood at a basic, general level across participants. All respondents understood that higher speeds meant a higher quality broadband service and that (generally) the higher the speed was, the higher the cost was.

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[10] E.g. Virgin Media website http://www.virginmedia.com/shop/broadband/ultrafast.html

Respondents also judged their broadband speed by whether it allowed them to use the internet in the way they wanted. For example, they thought about their broadband speed in terms of:

- How smooth the broadband experience was, particularly when streaming.
- How quickly files downloaded.
- How quickly websites loaded.
- Whether broadband slowed down when many people / devices connected at the same time.

> *'Speed is how fast pages load and how fast things download. The higher the speed, the better' (m, family, London, BC1*

Accordingly, **consumer satisfaction with broadband speed was often a proxy measure for their overall satisfaction with the quality of their broadband service.**

> *'It's how good it is. I don't know what speed I've got but it works so it's obviously fast enough' (f, young, no dependents, Cardiff, BC1)*

> *'Mine used to run slow so I upgraded to a higher speed, which didn't end up costing much more. I think I've got 50 now whereas before I had 17 and everything works fine now' (m, 'empty nester', Paisley, BC1)*

However, speed was less well understood when directly related to specific broadband packages. Although respondents generally understood that 'higher numbers' were better than 'lower numbers' (for example, 70Mb was 'better' than 50Mb), they rarely understood the personal relevance of this. Most were unsure what higher broadband speeds would mean for their own home broadband use and needs, and often saw their existing service as 'fast enough'.

> *'I've got quite a low number I think but it's fine for day to day. The grandchildren complain about it being slow though which is why I've been thinking about getting a higher number, the bigger broadband' (f, retired, Nottingham, C2DE)*

This led many to feel there was **no need for further thought or investigation with regard to the speed of different broadband packages** (unless respondents had a problem with their service speed). Accordingly, faster broadband speeds were sometimes seen as superfluous to current requirements. This further impacted on some participants' thoughts about fibre broadband as **the fastest services were seen as substantially faster than they needed**.

> *'I've got the middle speed. It's not the basic one and it's not the really expensive one. It's got the fibre but not the fastest fibre. I don't know if I'd even see any difference if I got the highest one' (m, family, Belfast, C2DE)*

In addition, some respondents understood that broadband speed could vary, both between different consumers with the same package and also at different times of day. Some were also aware that advertised speeds could be different to actual speeds. Respondents' awareness of

variations in speed was generally based in what they experienced or heard from other people, for example:

- Some participants cited buying a high-speed package but finding that their broadband connection was slower than expected.
- Others were aware that speed could vary according to location or how many others in the area were online.

> *'I've got Virgin and the speed is fine but if I lived down the valley, my friend has Virgin, the same one I have and she says it's awful. So I know it just depends where you are' (f, 'empty nester', Swansea, C2DE)*

> *'It's the number of other people using the internet at the same time in the same street. The more people who are online, the jerkier it gets. They're all sharing the same wires so it gets jammed up' (m, family, Northampton, BC1)*

Awareness of such variations in speed and differences between advertised and actual speeds sometimes made participants wary when viewing ads that referenced specific speeds. In this research project they were not however pressed further about their expectations of advertised speeds, as this was not the main focus of this piece of work.

2.6 Fibre

Most respondents had *some* ideas about what fibre was or what it promised and linked it closely to speed, but their understanding was generally very basic.

> *'I just thought fibre was just really, really fast internet...is it? I thought it must be different to speed but then I thought I don't know' (f, young, no dependents York, BC1)*

Approximately half of all respondents were aware that fibre was a type of cable that allowed for faster speeds, even if many did not know the details – when asked - of how exactly this cable was used to deliver broadband. **However, others did not see it as a delivery mechanism or a product.** Instead, fibre was often seen in more vague terms that were synonymous with modern, fast broadband.

As such, 'fibre' was sometimes perceived as just another 'buzzword' in a fast-changing industry that is constantly offering new and improved services. Some also thought fibre broadband was a modern, high quality broadband offered by most providers, but certainly the well-known brands. There were also a few respondents who had such low levels of understanding that they struggled to articulate anything about fibre.

> *'I think everyone knows it's fibre broadband now. If you were asking someone which one is the fastest, super, ultra or hyper, I don't think they could give you an answer...they're all nice, fast words that makes it seem like the best thing, and that it is really fast' (m, family, York, BC1)*

When asked to explain what 'fibre' meant most respondents replied in vague, general terms. For example, respondents talked about fibre as being:

- *'Better'.*
- *'The next generation'.*
- *'The best type of broadband'.*
- *'A faster connection'.*
- *'Faster than whatever is not fibre'.*
- *'What companies are all promising now'.*
- *'Enhanced performance'.*
- *'Broadband that delivers the knowledge faster'.*

Some further understood fibre as 'just another word for broadband'. Similarly, 'the internet', 'broadband' and sometimes 'ADSL' were sometimes seen to refer to the same thing. When probed on what 'broadband that is not fibre' meant, few were able to articulate this clearly.

The research also captured some misunderstandings about fibre, which emerged in isolation of looking at advertising. Specific misunderstandings **varied widely** across respondents, but some examples include:
- *'Fibre delivery speed is as variable as ADSL delivery speed'.*
- *'Fibre is delivered via a satellite dish'.*
- *'All Virgin services are (fully) fibre'* (conflation of fibre with coaxial cable)*.*
- *'Fibre is accessed via mobile hotspots'*
- *'Fibre means greater data allowances'.*
- *'Fibre particles are pumped through existing cables, which connect with each other to give you your connection'.*
- *Everything is fibre now'* because it is *'the new norm'.*

> *'If you've got like 100 meg fibre on Virgin it means you can watch more films and you won't be charged extra even though they take up a lot of space' (f, family, Nottingham, C2DE)*

> *'I think everything is fibre now isn't it. It's certainly what they're all advertising on the telly. It's the new word for the internet you buy for your home. Fibre internet' (m, retired, Cardiff, C2DE)*

> *'The words they use, like fibre optic and optic plus...they're just words they're using to make this product sound better than that one...sometimes you can't make the product actually better' (f, young, no dependents, York, BC1)*

When considering ads, participants often overlooked references to 'fibre' for various reasons:
- The high priority given to cost and speed resulted in other terms, including fibre, receiving less attention.
- Assumptions that fibre was **ubiquitous and offered by most broadband providers** reduced the perceived need to consider it.
- Low knowledge some participants had meant that even when the word *was* noticed in ads, it was **not always understood as a product / delivery mechanism**.

'I think every company has fibre now, it's a widespread thing, it's not enough to make me look them up' (m, young, no dependents, Cardiff, BC1)

Such low understanding and misunderstandings of broadband technology and terminology could impact on understanding of advertising, as detailed in the next section.

3. Testing the impact of 'fibre' and other terminology in advertising

This section considers:
- The impact of particular terminology in broadband ads and communications.
- How the low engagement levels and patchy understanding discussed in previous sections can impact on how such ads are consumed.

It begins by discussing how different types of ads are consumed and understood, and how the format of an ad can impact on consumer understanding. Next, the impact and influence of different words and phrases commonly used in broadband advertising are considered and, within these, the impact and influence of the word 'fibre'. Both part-fibre and full-fibre ads are covered. This section ends by offering conclusions about whether or not consumers are being misled by the word 'fibre' in terms of what action (if any) they take as a consequence of misunderstanding the word 'fibre' in part-fibre advertising.

3.1 Different types of ads and other communications content

The ads shown to research respondents can be seen in Appendix 1 and included a selection of broadcast and non-broadcast ads, including provider websites, posters, billboards and door-drop leaflets. These different types of ads had different levels of take-out that broadly varied according to the medium (broadcast, non-broadcast or online).

Broadcast ads were generally seen as the most complex as they conveyed information in real time, which meant that respondents had no time to reflect and consider what they were being shown until the ad was over.

Furthermore, broadcast ads typically used multiple creative devices such as music, imagery, story narratives and small print, making them more complicated than other types of advertising. Consequently, in the research, broadcast ads took longest to understand, and were most subject to misinterpretation and misunderstanding. Although they were also most engaging, their creative elements were prominent over the specific offer and other messages, and they therefore had most potential to mislead.

In contrast, non-broadcast ads typically contained less information, and were generally clearer than broadcast ads in their offers. This was also the case with online ads such as facebook ads and banner ads. However, their low information content meant that they were unlikely to be taken at face value as they did not provide sufficient information for participants to make conclusive decisions. They were instead seen by respondents as being most useful as a means of creating awareness (or in some cases acting as a reminder) of the existence of a

new package or provider, which could then trigger a respondent to undertake further research into the offer.

Provider websites, price comparison sites and review sites were seen as more useful than other types of online advertising. They typically contained more information and fewer distracting elements and were seen as being more impartial. Furthermore, respondents could browse and consume material in their own time, which meant that such content was - with caveats as previously around consumer understanding of specific terms – generally more easily-understood.

Online content of this type was not often spontaneously encountered. Instead, participants had to proactively seek it out – for example, via Googling. Rather than triggering a purchase journey, it was therefore used as part of the research process.

Provider websites were viewed and used slightly differently. Although some participants did use them as part of their research into different packages – i.e. looked at provider websites and directly compared different offerings – they were more commonly used at the end of the research journey to make purchases.

3.2 Reactions to common terminology in advertising

Broadband providers typically use a range of terms in their ads and on websites that are not common in everyday language, i.e. broadband-specific terms. These include:
- Technical terms that have a defined meaning, and can only be used if the term is factually accurate as applied to the package being described – for example 'speed in Mb' or 'superfast'.
- Descriptive terms such as package names and various other phrases that have no defined meaning so can be used by providers to describe any package. These are typically evocative and suggest high speed to participants – for example, 'Infinity', 'magic cable' or 'lightning fast'.

> *'They put words like superfast, infinity...it doesn't really sway my thinking, it's just words. They're just trying to portray that they have the best broadband out there' (f, 'empty nester', London, C2DE)*

The exact meaning of specific terms, and detailed understanding of which terms have a defined meaning and which are simply names, were not well-understood by participants. This was particularly notable when providers used descriptions that were very similar to technical terms – for example, the difference between 'lightning fast' (no defined meaning) and 'superfast' (which refers to a specific and defined range of speeds) was not understood.

Similarly, when directly questioned about the meaning of individual terms, **some participants extrapolated meaning from package names** – for example, the package name 'Infinity', was sometimes assumed to imply high speeds, unlimited data allowances or a guarantee of no price increases.

'It's all just gimmicks, I gloss over. I look for the number, the meg, and the cost. Those are the only bits that matter the rest is just like fancy words you can ignore' (f, 'empty nester', Northampton, C2DE)

This is not to imply that consumers would consider individual terms in such detail when viewing ads or broadband webpages outside of a research session. The point is simply that not only were individual terms not well-understood, the differences between different *types* of terms were not appreciated as different from one another. **Consequently, participants often viewed the words to describe broadband collectively as 'jargon' and tended to dismiss these words when viewing ads, focusing instead on advertised speeds and costs**.

'It's just sales talk. Everyone says they're the biggest, the boldest, the fastest, the most powerful. You need to look past it and consider the actual offer' (m, retired, Cardiff, BC1)

3.3 Part-fibre advertising

When viewing ads and playing back their narratives, creative elements were often noticed first, particularly in broadcast ads.

After creative elements, the next aspect of an ad to be noticed was often the monthly price and any other costs. As previously mentioned, even those who prioritised high speed tended to notice the cost, which stood out in ads and was memorable (there was also some sense that cost is an easy aspect to remember because it involves everyday terminology). A few of the ads shown did not mention prices and respondents often spontaneously remarked on this, sometimes going as far as to question why an ad was not up-front about costs and whether this implied a high price.

After cost, the specific selling points of each ad as relevant to individuals were noted, including speed.

Fibre was however rarely spontaneously mentioned when participants described an ad's narrative and was well below the radar when respondents consider the key points of each ad or website. A number of reasons were identified to explain this, all of which have been covered in previous sections but combined to make fibre low down in the order of importance:

* Firstly, **low engagement with broadband generally resulted in low consumer awareness of any differences between fibre products** – this was amplified when participants dismissed 'fibre' as 'broadband jargon', as described in the previous section.
* Secondly, speed was more top of mind and more quickly noticed in ads and on websites.
* Thirdly, the assumption that 'fibre' was offered by all providers made it easy to ignore or dismiss – **it was not seen as a differentiator** between providers or packages.
* Finally, the surrounding contextual words and imagery, and creative devices used in all provider ads to imply high speed, all competed for consumer attention and so **pushed 'fibre' further off the radar, making it easy to overlook**.

In addition, there was a tendency for fibre to be *assumed* in part-fibre advertising, even when the word itself was not mentioned within an ad (as was the case in the BT TV ad shown). This further reflected consumer assumptions that fibre was offered by all providers. **The word 'fibre' was, for many, so synonymous with 'modern, high quality broadband' that it was implied even when not mentioned**.

> *'It's the fibre... it's infinity so there's no limit on it and it's quite fast' (f, family, Nottingham, C2DE)*

> *'[BT Infinity meaning] It's that cable again – fibre cable that's more effective in certain houses or certain areas. They all seem to be putting this fibre bit in, don't they? There's obviously something better' (f, family, Cardiff, BC1)*

3.4 Full-fibre advertising

When viewing full-fibre ads, **only a minority of participants immediately understood that full-fibre providers offered something different**. Their assumption that all providers offered versions of the same service, and all claimed to be the best, meant that the speed claims in full-fibre ads were sometimes seen as an over-claim from an unknown provider.

> *'It's just like all the rest, saying it's faster, but the difference is I've never heard of these guys so I wouldn't look twice really' (m, family, Norwich, BC1)*

A number of factors meant that terminology such as 'pure fibre' or '20 times faster' often went unnoticed or misunderstood, and meant that **claims from full-fibre providers could be dismissed as 'broadband jargon'** or simply not believed:
- As previously mentioned, participants viewed the claims of part-fibre ads as over-claim. This influenced the context in which they viewed all broadband ads and meant that full-fibre providers were also often assumed to be over-claiming.
- Full-fibre providers were unknown and therefore less trusted.
- Consumer lacked detailed understanding of different terminology.
- Some participants did not understand the difference between units of measurement for speed and data allowances, so misunderstood a speed of 1Gb as a *data allowance* of 1GB.

All of these factors combined to make the full-fibre offerings seem expensive and poor value for money.

> *'They're charging a lot for just one gig, I've got more than that on my phone' (f, family, Northampton, C2DE)*

3.5 Impact of the word 'fibre' on participants understanding

It is not possible to conclude that the word 'fibre', as currently used in part-fibre advertising, is likely to mislead and misinform consumers.

Although viewing an ad could drive action – specifically, making further enquiries into different providers and packages – **this was not driven by misunderstanding of the word 'fibre'.**

Indeed, fibre in broadband was not a sufficiently high priority, particularly when compared with speed, to even be noticed in ads by all participants. **'Fibre' was more likely to be discounted as 'modern broadband' and ignored in ads, than it was to provoke thought or action**.

4.   Impact of educating participants about 'full-fibre'

This section details participant responses after being educated about the differences between full and part-fibre. It begins by reiterating the method used, then describes consumer thoughts after the differences between full- and part-fibre services had been explained.

4.1 Educating participants: Method used

At the end of the research session in stage 2 (79 respondents), the differences between ADSL, part-fibre and full-fibre were explained, and that full-fibre was currently only available to a small percentage of the country, but may be more widely available in the coming years. As part of this, the following diagram was used (Diagram 4 below).
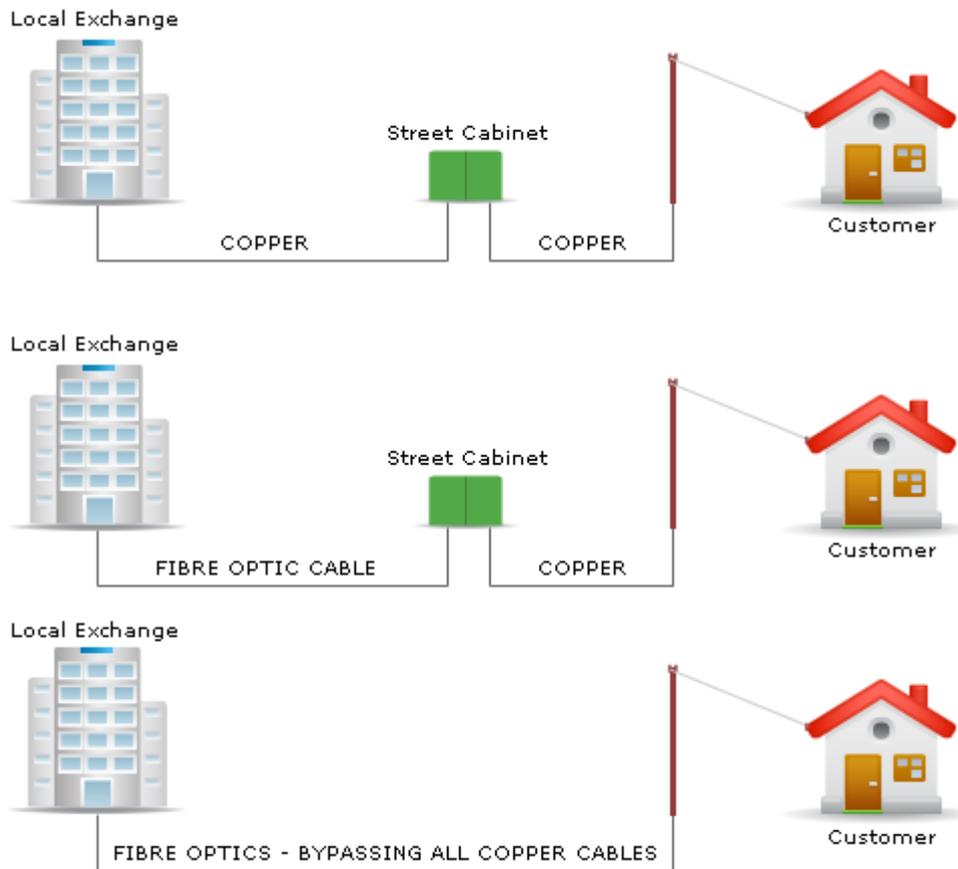
Diagram 4: Image shown to participants to explain differences between part-fibre and full-fibre

Participants were next asked whether they could tell which ads referred to full-fibre and which to part-fibre, and about any changes they would like to see.

After participants had stated which ads they thought were full-fibre and which were part-fibre, the benefits of full-fibre were then explained, and participants were invited to offer any thoughts on whether they thought the information in any of the ads should be changed.

Although this education would not happen if they saw ads in a real-world setting, it was felt useful to include this element to **assess their reactions once they understood the differences and to examine to what extent they personally felt misled**. It was felt particularly important to investigate what, if any, different actions they would have taken in terms of past purchase decisions.

4.2 Consumer reactions to education

Although the explanation of the differences between the different types of fibre made sense to a majority of participants, a few (9 of 79 respondents) did not understand it and were insufficiently interested or engaged to consider it further. Others (21 of 79) did understand it but were uninterested in engaging further with the idea.

> *'Honestly yeah that makes sense but it's not going to suddenly make me care about the wires or what have you, I'm still happy with what I've got' (m, family, Glasgow, C2DE)*

However, for most participants (49 of 79), the explanation made sense, and could reframe and reposition fibre. As previously mentioned, fibre was mostly below the radar in terms of interest, and was particularly secondary to speed. **However, the explanation about different types of fibre made the topic more interesting to many, who could see (often for the first time) why it might be important in a broadband package.**

Despite being given, and apparently understanding, the explanation, only approximately a third of participants were able to differentiate between full-fibre and part-fibre ads. A few immediately realised that providers such as Gigaclear, Hyperoptic and CityFibre were offering full-fibre services. Some however incorrectly assumed that part-fibre ads – particularly Vodafone's 'no line rental' non-broadcast ad, and various Virgin ads – were for full-fibre services, or that providers such as Hyperoptic were offering part-fibre.

There was also some sense that participants were *guessing* which services were which, simply because they had been asked as part of the research session – it was by no means definite that *the explanation alone* allowed them to clearly differentiate between ads, or that if they had viewed them in a real-world setting they would have been able to distinguish the different offerings.

Other participants, particularly those who prioritised having a leading brand name as a provider, still did not believe the claims of full-fibre providers.

> *'I just don't believe a company I've never heard of can be 10 times better than BT. No-one would really believe that. It sounds like a scam' (m, young, no dependents, Cardiff, BC1)*

Knowledge of the benefits of full-fibre often provoked thought and discussion, and many participants in the sample spontaneously re-examined their past purchase decisions and reconsidered these in the light of new knowledge. At this point, they imagined that they were in the small percentage of the country who could access a full-fibre service if they so chose.

Their thought processes typically involved:
- Consideration of their current package,
- Whether they were happy with it (i.e. whether it was seamless invisible broadband that met their needs),
- How much they paid for it,
- How much faster a full-fibre connection would be,
- Whether this would be worth it,
- Whether they thought they would notice any actual benefit given the extra cost.

> '*Thinking about all that, it is interesting, it makes me wonder if I'd known about this 6 months ago when I got my new internet, if I'd known this, would I have gone for this [full-fibre] instead? It is quite expensive though, but perhaps it would be worth it? Then again the one I've got is just fine for now*' (f, 'empty nester', Cardiff, C2DE)

However, most concluded that they were **satisfied with their past purchase decisions and would not have done anything differently**, even if they had the option of purchasing a full-fibre service. **They concluded that their current broadband package met their existing needs at an appropriate cost.** This was particularly true for light users, who did not typically have a top-speed part-fibre connection but were happy with their service, and for cost-focused users who were primarily focused on having as inexpensive a broadband service as possible.

> '*I understand fibre a lot better now but it's still not something I need or want to pay for*' (f, family, Northampton, C2DE)

Heavier users were, unsurprisingly, the most interested in the benefits of a full-fibre service and could see the attraction of the service. Although most were happy with their current part-fibre service, which was still fast enough to meet their current needs, some would be interested in full-fibre when it became more widely available in the future, if the cost was acceptable.

> '*I've got 200Mb with Virgin – I don't really care that it's part-fibre, it's super-fast. Would I notice the difference if I had 1Gb? I honestly don't know that I would. And I'm happier paying £40 than £65, which is how much this 1Gb option costs after the deal is over*' (m, young, no dependents, Glasgow, BC1)

> '*Even if I'd known about it [full-fibre] I wouldn't have got it now because I can pay a lot less for something that does me just fine. It's good to know about for the future though*' (f, 'empty nester', Cardiff, C2DE)

When considering the language used by part-fibre providers in advertising and on their websites, **some participants did feel that, although they were happy with their past**

decisions, part-fibre providers could be more transparent in their wording and more honest about what they were providing.

> *'It is a wee bit cheeky of them to say 'fibre' when it's not properly fibre. Then again, it's not like it would have made a blind bit of difference to me because until today I didn't think about fibre at all. So I suppose I think they should be more truthful simply because it's the right thing to do' (m, 'empty nester', Nottingham, BC1)*

This was not just about the word 'fibre' but about all aspects of ads, from ambiguous package names that suggested high speeds, to terms such as 'lightning fast' that had no measurable meaning.

> *'Yes, it is technically misleading, and maybe they shouldn't suggest they're full-fibre when they're part-fibre. But they've been doing it for years and now that word is so associated with modern broadband that it's far too late. Also they're misleading in lots of other ways like them all promising the best speeds. Even when you remove the word [fibre] from adverts, people don't notice and assume you're offering fibre, look at that BT advert' (m, 'empty nester', Nottingham, BC1)*

> *'It depends what they classify as 'fast fibre' because they're not using the same word. BT are using 'Infinity', and there's two levels of infinity, and this one saying 'fast fibre' – what is fast fibre? They need to say what they mean by 'fast fibre' – the speed' (m, 'empty nester', Nottingham)*

Others felt that part-fibre providers did not need to change anything – that consumers had a responsibility to research what they were buying. **They felt that the word 'fibre' itself was acceptable as it implied 'some fibre in the connection'**, which was true. Such participants often felt that the **onus was on full-fibre providers to better differentiate themselves** and educate consumers about the benefits of their service in their advertising.

> *'I just know that fibre means higher speed and they're not lying BT and the like, the newer technology they're offering does mean higher speed and there is fibre in there. It makes no odds to me if it's 50 or 100 or whatever, or they call it 'fibre' or 'superspeed'. It all means the same thing – it's a faster, more modern service that you pay more for if you want it. The fact these new companies are offering something even faster, well it's on them really to explain that better and these adverts don't tell me that at all' (f, 'empty nester', Manchester, C2DE)*

On thought and discussion and with a few exceptions, **participants generally did not think that the word 'fibre' should be changed in part-fibre ads.** Many were aware that, prior to the research session, they had not fully understood or really considered the word beyond at a cursory level. Most thought that the word 'fibre' was broadly synonymous with 'modern fast broadband'. **The word had little meaning beyond that for most people, and was barely noticed in advertising.** Some again suggested that full-fibre providers needed to work harder to educate consumers about the differences in the services they offered, and to differentiate their broadband packages from those of the part-fibre providers.

IV Conclusions

1. The term 'fibre' was not one of the priorities identified by participants when choosing a broadband package; it was not a key differentiator.

Low engagement with their own broadband service, and lack of interest in engaging with it except when forced to, meant that broadband was generally uninteresting to participants. Except for a few with more detailed understanding, this generally led to relatively low understanding of the broadband market (technology and terms).

Participants typically focused on their own main priorities, i.e. speed, cost and data allowances. 'Fibre' was not a priority – it was seen as something that all providers offer, so was not used to differentiate different providers and packages.

2. The word 'fibre' was not spontaneously identified within ads – it was not noticed by participants and did not act as a trigger for taking further action.

The word 'fibre' was not particularly interesting or top of mind as a term. When ads were viewed, low / mixed knowledge and understanding of 'fibre' and other aspects of broadband reduced the impact of specific words in a number of ways, meaning that 'fibre' did not stand out.

Other aspects of ads dominated participant attention, particularly speed, costs and (for broadcast ads) other creative elements such as music, imagery, story narratives and small print. However, the broadband delivery mechanism was not top of mind when viewing ads, and the word 'fibre' was simply seen as one of many buzzwords to describe modern, fast broadband.

3. Once educated about the meaning of fibre, participants did not believe they would change their previous purchasing decisions; they did not think that the word 'fibre' should be changed in part-fibre ads.

Although a few heavier users expressed future interest in full-fibre when it became more broadly available and costs were lower, most participants across the sample were generally satisfied with their current broadband speed and the price they paid for their package. This was true for both light users who did not want to pay more per-month for a higher-speed service, and for heavier users who paid more for higher speeds.

Some participants felt that part-fibre providers could be more transparent in their advertising across all terminology, including package names and descriptions. Overall however, most participants did not think that the word 'fibre' should be changed in part-fibre ads. Many were aware they had never previously considered the term in broadband advertising, and most still equated it to 'modern fast broadband', with little meaning beyond that. Some again suggested that full-fibre providers needed to work harder to educate consumers about the differences in the services they offered, and to differentiate their broadband packages from those of the part-fibre providers.

* * * * *

Appendix 1: Stimulus shown to respondents

Broadcast adverts

BT Infinity TV ad	Fast just got faster *No mention of fibre*	Stages 1 & 2
Sky (Lego Batman) TV ad	Lowest price Sky Fibre for Sky customers	Stages 1 & 2
Plusnet TV ad	Unlimited Fibre	Stages 1 & 2
Virgin TV ad	Awesome wifi Virgin Fibre *No mention of speeds or costs*	Stages 1 & 2
TalkTalk YouTube video / website	Fibre Broadband	Stages 1 & 2
Hyperoptic website	Full fibre Never shown first	Stages 1 & 2

Non-broadcast adverts

Sky press ad	UK's lowest price fibre Superfast Sky Fibre Super reliable	Stages 1 & 2
Virgin outdoor ad	Full stream ahead Virgin Fibre *No mention of speeds*	Stages 1 & 2
Plusnet press ad	Unlimited Fibre *No mention of speeds*	Stages 1 & 2
TalkTalk direct mail	Fibre broadband bonanza Totally unlimited fibre broadband	Stages 1 & 2
Vodafone outdoor ad	Vodafone unlimited fibre	Stages 1 & 2
Cityfibre	Full fibre	Stages 1 & 2
Hyperoptic homes	Full fibre Never shown first	Stages 1 & 2

Online adverts, online content and provider websites

BT website	Infinity broadband	Stages 1 & 2
Virgin fibre sponsored ad	Ultrafast Ultra-reliable Next generation fibre *No mention of specific speeds*	Stage 1 only
Virgin website	Up to 300Mb	Stage 2 only
Vodafone facebook ad	Fibre Home Broadband	Stages 1 & 2
SSE Website	Superfast Fibre Broadband Ultra Fast Fibre Broadband	Stage 1 only
Comparison site USwitch	Unlimited broadband BT Infinity Fibre Unlimited Broadband	Stages 1 & 2
Hyperoptic website	Full fibre Never shown first	Stages 1 & 2

Appendix 2: Full objectives, sample structure and additional sample criteria

Appendix 2a: Objectives
Detailed research objectives were broken down as follows:

Broad, general understanding of 'fibre'
- Consumer understanding of what 'fibre' means / is in the general context of broadband services
    - Spontaneous understanding of the term
    - Prompted understanding of the term
    - How they use the term in context
    - Whether they are aware that it is a product

- Any common misunderstandings around the term and what these are
    - If they think it is something else, e.g. speed / reliability, what they think it is
    - Whether they are clear about what they think it is, or have only vague / partial awareness and understanding
    - Whether they understand how it differs from other terminology commonly used in broadband adverts

- Whether other terminology commonly used in broadband adverts influences understanding of 'fibre', and how / in what combination
    - Terms related to speed:
        - Fast broadband
        - Faster fibre
        - Super-fast
        - Ultra-fast
        - Everyday / standard
        - High-speed
        - Upload / download speeds in Mb
    - Other common terminology that may be poorly understood and thought to relate to 'fibre'
        - 'Unlimited' broadband / internet
        - Data amounts per month
        - Powerful / super router
        - ADSL

- How understanding of 'fibre' might vary in different contexts
    - Whether and how understanding differs depending on whether the term is used in a brand name or as a descriptive term

Customer journey to choosing a broadband ISP and package/service
- Key considerations and drivers
    - If / how different ISPs and packages are researched
    - What questions arise during the research process

- Sources of information used and the relative importance of these (e.g.: adverts, comparison sites such as uswitch.com, forums, reviews, media coverage, word of mouth)

- How purchase decisions are made – which factors are key
  - Impact of cost / value
  - Impact of speed
  - Impact of fibre
  - Impact of bundle / package
  - Other influencing factors

The impact of using the word 'fibre' in broadband ads or price comparison websites

- What consumers understand when 'fibre' is used in specific adverts or on comparison sites, exploring:
  - How 'fibre' is understood in conjunction with other related terminology used in adverts, e.g. superfast, ultra-fast, ultra-reliable, fastest
  - How does understanding differ when 'fibre' is used in comparisons between products (e.g. of the same provider, different providers)
  - Whether the way 'fibre' is understood is constant or varies between adverts
    - Whether understanding varies depending on how 'fibre' is used, e.g. in a brand name or as a descriptive term
    - If it varies, how and why; what drives variation / confusion

- Whether / how the inclusion of 'fibre' in adverts or comparison sites influences consumers' understanding of the service offered
  - The extent to which this influences how consumers view the broadband package on offer, e.g. broadband speed, reliability, other aspects of the service they are likely to receive
  - The extent to which other factors influence how consumers view the broadband package on offer
  - How great an impact the word 'fibre' has as compared to other factors

- How this influences their transactional decisions (purchasing a product or making further enquiries about purchasing a product)
  - Any differences between consumers, e.g.
    - Demographics
    - Age
    - Sex
    - Location
    - Level of pre-existing knowledge
    - Experiences with current broadband provider

- If they saw a particular advert, what action they would be likely to take
- How all of the above varies (if at all) after education about what 'fibre' really is

Appendix 2b: Full sample and additional sample criteria

Sample Requirements:
110 respondents interviewed via:
Stage 1: 30 depth interviews
Stage 2: 5 hall test short depth interview sessions with 16 people per hall test

Stage 1: 30 respondents

Quota		Depth interviews
Type of consumer	Switched ISP / broadband package	Min 12
	Would consider switching ISP / broadband package	Min 12
Life-stage	Young, no dependents	Min 6
	Family	Min 6
	Empty nester	Min 6
	Retired	Min 6
Sex	Male	Min 14
	Female	Min 14
SEG	BC1	Min 14
	C2DE	Min 14
Type of employment	Self-employed or work from home at least 1 day per week	Min 6
Location (bias to more suburban/rural respondents within each location except N. Ireland which should have a spread of urban, suburban and rural)	England – South East	6
	England – Northampton	6
	England – York/Hull	6
	Northern Ireland	6
	Scotland	3
	Wales	3
Total		**30**

Stage 2: 80 respondents (NB: One respondent did not attend, making 79 in total)

Quota		Hall test interviews (16 respondents per hall test)
Type of consumer	Switched ISP / broadband package	Min 6 per hall test
	Would consider switching ISP / broadband package	Min 6 per hall test
Life-stage	Young, no dependents	Min 15 across the hall tests
	Family	Min 15 across the hall tests
	Empty nester	Min 15 across the hall tests
	Retired	Min 15 across the hall tests
Sex	Male	Min 6 per hall test
	Female	Min 6 per hall test
SEG	BC1	Min 6 per hall test
	C2DE	Min 6 per hall test
Type of employment	Self-employed or work from home at least 1 day per week	Min 3 per hall test
Location **(bias to urban respondents in each location)**	England – South East	1
	England – Midlands	1
	England – North	1
	Wales	1
	Scotland	1
Total		**5 hall tests, 80 respondents**

Additional criteria:

Across all respondents:

- All were responsible, or jointly responsible, for broadband purchase decision (choice of ISP and package)
- Half had switched ISP / broadband package or purchased their first broadband package in the past six months

- Half were considering switching ISP / broadband package
- A good mix of broadband providers across the sample and across these a spread of broadband technologies (including ADSL1 and ADSL2+, cable (fibre optic) and ideally fibre ('fibre to the cabinet')
- Good mix in terms of internet use, from heavy internet users to more casual internet users
- Good mix in terms of household sizes – included individual and multiple users of the internet in the property
- A good spread in terms of how knowledgeable and confident they felt about the internet/new technologies, including
    - screening out anyone who worked in a related field so would have better-than-average knowledge of broadband technology
    - within the remainder, maximum quotas for more 'technologically savvy' respondents to limit their number in the sample
- A good spread of age across the different life stages
- All respondents (esp. retired) were fully able to give informed consent to take part in interview

Appendix 3: Recruitment questionnaires

Appendix 3a: Stage 1 recruitment questionnaire

INTRODUCTION

RECRUITER TO READ OUT:

Good morning/afternoon/evening. My name is (…) from **Define** an independent market research company. We are looking for people to take part in informal interviews about broadband internet in the home.

In recognition of taking part in the research[11], we will be giving participants a 'thank you' of £35 each.

At no time during the interview will any attempt be made to sell anything to you, this is purely a market research exercise. If you wish to check anything about this research, please call Define on 020 8346 7171. Please ask to speak to Joceline Jones, who will be happy to answer any questions you may have.

Firstly, could you spare a few minutes of your time to answer a few simple questions to see if you are suitable for the research? We are looking for specific people to take part so there is a chance that if your profile is similar to other people you may not be called for interview.

Anything you are asked in this questionnaire is strictly confidential and is just to ensure that we speak to a mixture of different people. You will not be specifically asked about any of the content of these questions or asked to share anything about them in the interview.

If you are chosen to take part in the research, you may be asked to complete a brief additional task before the main interview, which would take you around half an hour in your home. If you choose to complete this task, you will be given an additional 'thank-you' of £15.

SCREENING			

Q.S1a Do you or any of your close friends or relatives work in the following occupations?

Market Research	1 – CLOSE	IT / computing	5 – CLOSE
Media / Journalism	2 – CLOSE	Telecoms	6 – CLOSE
Public Relations / Advertising / Marketing	3 – CLOSE	A broadband provider	7 – CLOSE
Other	9 – Go to Q S1b		

Q.S1b Check role (Write in)
_____
RECRUITER: CLOSE IF RELATED TO I.T., THE INTERNET OR TELECOMMUNICATIONS

Q.S2 Have you ever taken part in a market research group discussion or a depth interview?

---

[11]Ensure respondent understands the incentive is for attending the session described and not completing this screening interview

| Yes | 1 | **CONTINUE** |
| No | 2 | **GO TO Q.S5** |

Q.S3 When did you last take part in a market research group discussion or depth interview?

| In the last 6 months | 1 | **CLOSE** |
| Over 6 months ago | 2 | **CONTINUE** |

Q.S4 How many market research group discussions or depth interviews have you taken part in, in the last 2 years?

| 1-2 | 1 | **GO TO Q.S4b** |
| 3 or more | 2 | **CLOSE** |

Q.S4b What subjects have you been interviewed in before? (Please write in)

_____

RECRUITER: CLOSE IF RELATED TO BROADBAND SERVICES OR TELECOMMUNICATIONS

Q.S5 GENDER   MALE   FEMALE   **CHECK QUOTAS**

MIN 14 MALE, MIN 14 FEMALE

Q.S6 SEG: OCCUPATION/WORKING STATUS OF H.O.H (Write in)
_____

MIN 14 BC1, MIN 14 C2DE

Q.S7: **WORK LOCATION** / **STATUS** OF RESPONDENT (ASK IF ANY APPLY)

Self-employed and use internet at home for work purposes	1	**CHECK QUOTAS**
Work from home at least 1 day per week	2	**CHECK QUOTAS**
Other	3	**CONTINUE**

MIN 3 TO WORK FROM HOME AT LEAST ONE DAY A WEEK AND MIN 3 TO BE SELF-EMPLOYED

Q.S8: Which of these best describes you?

White British	1	Bangladeshi	11
White Irish	2	Any other South Asian Background	12
Any other white background	3	Mixed – White and Black Caribbean	13
Black British	4	Mixed – White and Black African	14
Black Caribbean	5	Mixed – White and Asian	15
Black African	6	Any other mixed background	16
Any other Black background	7	Chinese	17
Asian British	8	None of the above / other (please write below) _____	16

Indian	9	Prefer not to answer	17
Pakistani	10		

MAIN QUESTIONNAIRE

RECRUITER: ENSURE THROUGHOUT THAT RESPONDENT UNDERSTANDS QUESTIONS ONLY REFER TO BROADBAND IN THE HOME – <u>NOT</u> AT WORK OR OTHER LOCATIONS

Q.1 On a scale of 1-10, where 1 is 'I don't know much about technology or how the internet works', and 10 is 'I keep up to date with the latest knowledge, and understand a lot about technology and how the internet works', how knowledgeable would you say you are?

Very low level knowledge						About average			High
1	2	3	4	5	6	7	8	9	10

RECRUITER: AIM FOR A SPREAD OF UNDERSTANDING ABOUT INTERNET TECHNOLOGY

NONE TO HAVE HIGH LEVEL KNOWLEDGE (CODE 10)

Q.2 Which of the following applies to you?

I currently have broadband in my home	1	GO TO Q4
I have previously had broadband in my home in the past but do not currently	2	GO TO Q3
I have never had broadband in my home	3	GO TO Q3

QUOTA: MAXIMUM 6 RESPONDENTS TO CODE 2 OR 3

Q.3 **Ask only those who coded 2 or 3 at Q2:** Are you considering purchasing broadband at all?

I am considering purchasing broadband	1	**RECRUIT**
I have considered purchasing broadband in the past	2	CLOSE
I am not considering purchasing broadband currently	3	CLOSE
I have never considered purchasing broadband	4	CLOSE

RECRUITER: ALL MUST CODE 1, OTHERWISE CLOSE

Q.4 Thinking about your broadband provider and package, which of the following applies to you?
Explain if needed: By 'broadband provider' we mean a company that supplies broadband such as BT, Sky, Virgin Media, Plusnet etc. By 'package', we mean the amount you pay per month, which usually varies according to broadband speed, with faster speeds costing more per month. Some packages are bundled with other services such as line rental and digital TV.

I chose my current broadband supplier and package alone	Continue
I chose my current broadband supplier and package along with someone else in the household	Continue
Someone else chose my current broadband supplier and package	CLOSE

Q.5a. Thinking back over the past six months:

I have changed to a new broadband provider	1 GO TO Q6
I have changed my broadband package but stayed with the same provider	2 GO TO Q6
I have purchased broadband for the first time	3 GO TO Q6
Neither of the above	4GO TO Q5b

Q5b. Ask only those who coded 4 at Q5a: Are you considering switching your broadband provider or your broadband package?

Yes, I have looked into switching	1 GO TO Q6
Yes but I have not yet looked into switching	2 GO TO Q6
Maybe - I would consider switching	3 GO TO Q6
No, I would not consider switching	4 CLOSE

Q.6   Who is your current broadband provider?

BT	1	Sky Broadband	4
EE	2	TalkTalk	5
Plusnet	3	Virgin Media	6 See quota
Other (please write in) _____	7		

Q.8 Thinking of how much your broadband is used by yourself and / or others living at home, which one of these descriptions best applies to your house as a whole?

Used mostly for things such as: • General browsing • Sending / receiving emails and messages	Low / light use	1
As well as the above, also used regularly for • Messaging (e.g. using an online forum or using facebook chat) • Social media • Buying goods / services	Medium use	2
As well as the above, also used daily for • YouTube, Skype	Heavy use	3

• Watching online TV, films		
• Downloading / streaming services		
• Online gaming		

RECRUITER: AIM FOR A SPREAD OF INTERNET USAGE

Q.9   Do you live with anyone else who uses broadband in your home?

Tick if household member uses the Internet at home:

Only me (single user household)	Partner / spouse	Child(ren)	Housemate	Tenant /lodger	Other

RECRUITER:
AIM FOR A SPREAD OF HOUSEHOLD SIZES
AIM TO INCLUDE SOME RESPONDENTS FROM HOUSEHOLDS WITH MULTIPLE INTERNET USERS AND SOME WITH SINGLE USERS

ADDITIONAL DEMOGRAPHIC QUESTIONS

Q.D1   Where do you live (write in)? --

RECRUITER: CHECK EXACT LOCATION QUOTAS

Q.D2   Which of the following best describes you?

I live in a city	1	Urban
I live on the edges of a city	2	Suburban
I live in a more rural area	3	Rural

RECRUITER:
BIAS TOWARDS SUBURBAN AND RURAL IN ALL LOCATIONS EXCEPT N. IRELAND
IN N. IRELAND, GOOD MIX OF URBAN, SUBURBAN AND RURAL

Q.D3   Which of the following best describe you? *Recruiter explain that respondents can choose all that apply*

Single	1	Young, no dependents
In a relationship	2	Young, no dependents
Living with a partner	3	Young, no dependents
Taking care of children	4	Family
Children left home	5	Empty Nest
Retired from work	6	Retired

RECRUITER:
IF RESPONDENT SELECTS ANSWERS FROM DIFFERENT LIFESTAGES, CODE AS THE LATEST LIFE STAGE SELECTED (E.G. IF BOTH SINGLE AND RETIRED FROM WORK, CODE AS RETIRED)
QUOTAS:
YOUNG, NO DEPENDENTS: MIN 6
FAMILY: MIN 6
EMPTY NESTER: MIN 6

RETIRED: MIN 6

Q.D4   How   old   are   you?   (Write   in)
………………………………………………………………

RECRUITER: AIM FOR A SPREAD OF AGE ACROSS THE LIFE STAGES

PARTICIPATION

Thank you very much for taking the time today to help us with this survey

All personal information will be anonymous, and reported collectively, with everyone's answers added together. Everything shared will be in complete confidence. We will not pass any personal information that could identify you or pass on your personal contact details to any other organisation.

RECRUITER SCRIPT:

EITHER: Would you be available on **[REFER TO FIELD SPEC]** to take part?

OR: We will contact you again shortly to arrange a specific time and date (or possibly to let you know that we won't need you for the study).

If you need to call us to check any details or re-arrange a time then please do so on 0208 346 7171. Please ask for Allison Samuel.

I confirm that this interview was administered according to the MRS Code of Conduct.

Signature of Recruiter: …………………………….   **Date   of   recruitment:** ………………………………

Appendix 3b: Stage 2 recruitment questionnaire

INTRODUCTION: As stage 1, without reference to pre-task, and offering £25 incentive

Q.S1a Do you or any of your close friends or relatives work in the following occupations?

Market Research	1 – CLOSE	IT / computing	5 – CLOSE
Media / Journalism	2 – CLOSE	Telecoms	6 – CLOSE
Public Relations / Advertising / Marketing	3 – CLOSE	A broadband provider	7 – CLOSE
Other	9 – Go to Q S1b		

Q.S1b Check role (Write in)
_____
RECRUITER: CLOSE IF RELATED TO I.T., THE INTERNET OR TELECOMMUNICATIONS

Q.S2 Have you ever taken part in a market research group discussion or a depth interview?

Yes	1	**CONTINUE**
No	2	**GO TO Q.S5**

Q.S3 When did you last take part in a market research group discussion or depth interview?

In the last 6 months	1	**CLOSE**
Over 6 months ago	2	**CONTINUE**

Q.S4 How many market research group discussions or depth interviews have you taken part in, in the last 2 years?

1-2	1	**GO TO Q.S4b**
3 or more	2	**CLOSE**

Q.S4b What subjects have you been interviewed in before? (Please write in)

_____
RECRUITER: CLOSE IF RELATED TO BROADBAND SERVICES OR TELECOMMUNICATIONS

Q.S5 GENDER   MALE   FEMALE   **CHECK QUOTAS**

MIN 36 MALE, MIN 36 FEMALE

Q.S6 SEG: OCCUPATION/WORKING STATUS OF H.O.H (Write in)
_____

MIN 36 BC1, MIN 36 C2DE

Q.S7: **WORK LOCATION** / **STATUS** OF RESPONDENT (ASK IF ANY APPLY)

Self-employed and use internet at home for work purposes   1   **CHECK QUOTAS**

Work from home at least 1 day per week	2	**CHECK**
QUOTAS
| Other | 3 | **CONTINUE** |

Q.S8: Which of these best describes you?

White British	1	Bangladeshi	11
White Irish	2	Any other South Asian Background	12
Any other white background	3	Mixed – White and Black Caribbean	13
Black British	4	Mixed – White and Black African	14
Black Caribbean	5	Mixed – White and Asian	15
Black African	6	Any other mixed background	16
Any other Black background	7	Chinese	17
Asian British	8	None of the above / other (please write below) _____	16
Indian	9	Prefer not to answer	17
Pakistani	10		

MAIN QUESTIONNAIRE

Q.1   On a scale of 1-10, where 1 is 'I don't know much about technology or how the internet works', and 10 is 'I keep up to date with the latest knowledge, and understand a lot about technology and how the internet works', how knowledgeable would you say you are?

Very low level knowledge High									About average High
1	2	3	4	5	6	7	8	9	10

Q.2   Which of the following applies to you?

I currently have broadband in my home	1	GO TO Q4

I have previously had broadband in my home in the past but do not currently	2	GO TO Q3
I have never had broadband in my home	3	GO TO Q3

Q.3   **Ask only those who coded 2 or 3 at Q2:** Are you considering purchasing broadband at all?

I am considering purchasing broadband	1	**RECRUIT**
I have considered purchasing broadband in the past	2	CLOSE
I am not considering purchasing broadband currently	3	CLOSE
I have never considered purchasing broadband	4	CLOSE

RECRUITER: ALL MUST CODE 1, OTHERWISE CLOSE

Q.4   Thinking about your broadband provider and package, which of the following applies to you?

Explain if needed: By 'broadband provider' we mean a company that supplies broadband such as BT, Sky, Virgin Media, Plusnet etc. By 'package', we mean the amount you pay per month, which usually varies according to broadband speed, with faster speeds costing more per month. Some packages are bundled with other services such as line rental and digital TV.

I chose my current broadband supplier and package alone	Continue
I chose my current broadband supplier and package along with someone else in the household	Continue
Someone else chose my current broadband supplier and package	CLOSE

RECRUITER: ALL TO HAVE HAD SOME INVOLVEMENT IN CHOOSING SUPPLIER AND PACKAGE

Q.5a. Thinking back over the past six months:

I have changed to a new broadband provider	1 GO TO Q6
I have changed my broadband package but stayed with the same provider	2 GO TO Q6
I have purchased broadband for the first time	3 GO TO Q6
Neither of the above	4GO TO Q5b

RECRUITER:
MIN 36 TO CODE 1 OR 2; MIN 16 TO CODE 1
MIN 36 TO CODE 3

Q5b. Ask only those who coded 4 at Q5a: Are you considering switching your broadband provider or your broadband package?

Yes, I have looked into switching	1 GO TO Q6
Yes but I have not yet looked into switching	2 GO TO Q6
Maybe - I would consider switching	3 GO TO Q6
No, I would not consider switching	4 CLOSE

RECRUITER: NONE TO REJECT IDEA OF SWITCHING BROADBAND PROVIDER / BROADBAND PACKAGE

Q6a. Which factors were important to you when considering different broadband providers / packages? (Tick all that apply)

Speed	1
Cost	2
Reliability	3
Brand / provider	4
Customer service	5
Fibre	6 See quota
Download allowances	7
Contract length	8
'Bundle' package with other elements e.g. free calls, TV package	9
Other (specify)	10

RECRUITER: MIN 20 TO INCLUDE FIBRE

Q6b Of the above, which factor was <u>most</u> important to you when considering different broadband providers / packages?

Speed	1
Cost	2
Reliability	3
Brand / provider	4
Customer service	5
Fibre	6 See note
Download allowances	7
Contract length	8
'Bundle' package with other elements e.g. free calls, TV package	9
Other (specify)	10

RECRUITER: RECORD THOSE WHO ANSWER 'FIBRE' (NO QUOTAS)

Q.7   Who is your current broadband provider?

BT	1	Sky Broadband	4
EE	2	TalkTalk	5
Plusnet	3	Virgin Media	6 See quota
Other (please write in) _____	7		

RECRUITER: MIN 16 ACROSS SAMPLE TO HAVE VIRGIN MEDIA
OTHERWISE, AIM FOR A SPREAD OF BROADBAND PROVIDERS

Q.8 Thinking of how much your broadband is used by yourself and / or others living at home, which one of these descriptions best applies to your house as a whole?

Used mostly for things such as: • General browsing • Sending / receiving emails and messages	Low / light use	1
As well as the above, also used regularly for • Messaging (e.g. using an online forum or using facebook chat)	Medium use	2

• Social media • Buying goods / services		
As well as the above, also used daily for • YouTube, Skype • Watching online TV, films • Downloading / streaming services • Online gaming	Heavy use	3

Q.9   Do you live with anyone else who uses broadband in your home?

Tick if household member uses the Internet at home:

Only me (single user household)	Partner / spouse	Child(ren)	Housemate	Tenant /lodger	Other

ADDITIONAL DEMOGRAPHIC QUESTIONS

Q.D1   Where do you live (write in)?   --

Q.D2   Which of the following best describes you?

I live in a city	1	Urban
I live on the edges of a city	2	Suburban
I live in a more rural area	3	Rural

Q.D3   Which of the following best describe you? *Recruiter explain that respondents can choose all that apply*

Single	1	Young, no dependents
In a relationship	2	Young, no dependents
Living with a partner	3	Young, no dependents
Taking care of children	4	Family
Children left home	5	Empty Nest
Retired from work	6	Retired

IF RESPONDENT SELECTS ANSWERS FROM DIFFERENT LIFESTAGES, CODE AS THE LATEST LIFE STAGE SELECTED (E.G. IF BOTH SINGLE AND RETIRED FROM WORK, CODE AS RETIRED)
QUOTAS:
YOUNG, NO DEPENDENTS: MIN 16
FAMILY: MIN 16
EMPTY NESTER: MIN 16
RETIRED: MIN 16

Q.D4   How   old   are   you?   (Write   in)
……………………………………………………………………

RECRUITER: AIM FOR A SPREAD OF AGE ACROSS THE LIFE STAGES

PARTICIPATION

Thank you very much for taking the time today to help us with this survey

All personal information will be anonymous, and reported collectively, with everyone's answers added together. Everything shared will be in complete confidence. We will not pass any personal information that could identify you or pass on your personal contact details to any other organisation.

RECRUITER SCRIPT:

EITHER: Would you be available on **[REFER TO FIELD SPEC]** to take part?

OR: We will contact you again shortly to arrange a specific time and date (or possibly to let you know that we won't need you for the study).

If you need to call us to check any details or re-arrange a time then please do so on 0208 346 7171. Please ask for Allison Samuel.

I confirm that this interview was administered according to the MRS Code of Conduct.

Signature of Recruiter: ………………………….   **Date   of   recruitment:**
……………………………

Appendix 4: Discussion guides

Appendix 4a: Stage 1 discussion guide

Note: This Guide indicates the areas to be explored in the discussion, the likely order in which topics will be covered and the kinds of questions and techniques which may be used. There will be some flexibility of discussion, however, to account for each individual being interviewed and the session type

Not all respondents will respond to the same level of language or explanation. While the questions below details how we intend to cover topics in our own 'language', efforts will be made to meet the communication needs of the individuals interviewed.

Timings on the guide are approximate and give an indication of where the emphasis in the conversation will be.

Materials:
- Pre-task (Mystery Shopping Exercise or Customer Journey)
- Word-board
- Broadband advertising examples
- Moderators to have laptops / tablets with internet or TV ads downloaded to devices

Timing summary:
- Introductions (5 mins)
- General understanding of broadband (10 mins)
- Customer journey to choosing a broadband provider and package/service (20-25 mins)
- Impact of different terminology on purchase decisions (10-15 mins)
- Impact of different terminology in specific adverts (20-25 mins)
- Understanding of 'fibre' (10-15 mins)
- Summing up (5 mins)

Moderators please note:

Half of the sessions to start (after brief introductions) by showing the adverts (section 5) After this, return to section 2.

Do not mention 'fibre' to respondents unless directly prompted (e.g. section 6), but listen out for any spontaneous mentions. If 'fibre' is mentioned, probe on what they mean by the term.

Please ensure that you, as a moderator, are familiar with typical broadband terminology – e.g. the difference between fibre and cable. See 'crib sheet' provided.

Do not educate or correct respondents. If they don't know a lot about any aspects of broadband, reassure them that this is fine (and that you are not a technical expert either so can't answer 'technical questions'). Let them speak exactly according to their current beliefs and simply observe/record misunderstandings, do not flag them up in any way.

1. Introduction (5 mins)

Moderator:
- Introduce self, explain the process of market research to respondents (member of MRS, confidentiality and independence) and the format of the discussion
  - Explain that we are going to be talking about broadband internet and that in this project we are deliberately talking to ordinary consumers, not technical experts
  - We're interested in what made them choose their broadband package, but that this is nothing to do with sales and we will not try to sell them anything

Brief background details of respondents: First name, family details, working status, key interests, etc

2. General understanding of broadband (10 mins)

Purpose: To briefly assess their general understanding of home broadband and start probing on broad understanding of common terminology

Moderator: Explain that we are going to start by talking about the broadband they have in their homes. This isn't about what they might have at work, or while they're out of the house, just about their connection at home.

- What kind of words or phrases come to mind when you think about broadband Internet? What do these mean? *(Moderator: Do not prompt but note any mention of 'fibre', 'fibre-optic' etc. Note language respondent uses. **Do not probe further on 'fibre' at this point, even if mentioned**)*

- Can you tell me a bit about your broadband connection at home? (*Moderator: Note what they mention first, e.g. broadband provider, speed, reliability. Explore spontaneous reactions fully.)*
  - Who provides it?
  - How long have you had it? *(Note: Do not discuss purchase journey yet)*
  - What do you use it for? (E.g: Web-surfing, email, streaming or downloading music, movies or TV)
  - [If not a single-person household] What do other people in the house use it for?
  - Reliability
    - How reliable is your broadband connection? Why do you say that?
  - Cost / value for money
    - Is your broadband package good value for money?
    - Why do you say that? What makes it good / bad?
  - Speed
    - Do you know how fast your broadband connection is?
    - Does this vary at all? How / when?
    - Do you know why it varies? *[Note if 'fibre' is confused with speed but do not prompt or educate]*
  - Connection / delivery
    - Do you know how your broadband is delivered to your house? *[Explore but do not prompt, particularly if 'fibre' is mentioned]*
  - Broadband provider
    - Do you know about different broadband providers?
    - Which broadband providers can you think of?
    - Are there any differences between these?
- On a scale of 1-10, how happy are you with your broadband at home? Why is this?

3. Customer journey to choosing a broadband provider and package/service (20-25 mins)

Purpose: To start unpicking the factors that lead to purchase decisions or result in further questions / action

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Pre-Task: Customer Journey or Mystery Shopping Diary

Moderator: Refer to pre-task appropriate to respondent and explain:

Say to those who have switched: *I'd like to talk about how you came to choose your current broadband provider and package – all the different factors that led up to your decision to purchase. Can we start by having a look at the written exercise you completed for us before the session?*

Say to those who are considering switching: *I'd like to talk through the exercise we asked you to do, where you chose a new broadband provider and package – all the different factors that led up to your decision. Can we start by having a look at the written exercise you completed for us before the session?*

- What made / is making you think about changing your broadband package?
  - *Allow spontaneous responses then explore fully, e.g.: Dissatisfaction with current ISP (what/why),saw a better offer (what / where / what made it better), wanted faster speed, a better price, etc*

Go through pre-task, probing on their decision-making processes

- What was the first thing you did when looking for a new broadband provider or broadband package?

- Did you research different options?
  - *If yes:*
    - Which providers did you consider? *(If necessary, explain briefly that providers are companies such as BT, Sky, Virgin etc who sell broadband services)*
      - Why these providers?
    - Are there any providers you would not consider?
      - Why is that?
    - Did you compare 'packages' from different providers?
      - What kind of things were you looking for in a package? (*Listen out for mentions of fibre; do not prompt*)
    - How did you research the different options?
      - Probe if necessary on use of: adverts, comparison sites (e.g. uswitch.com), forums, reviews, media coverage, word of mouth
      - Which of these would you consider more important/useful?
  - *If no:*
    - How did you come to a decision about which provider and broadband package to purchase? (*Get respondent to talk through in detail*)
      - Saw an advert? (*If so, find out which one – ideally, use this as stimulus later to investigate which factors drove purchase decision*)
      - Phoned preferred provider?
      - WOM?

- Did you have any questions as you went through the process?
    - What were these?
    - What made you ask [their question]? (*Listen out for **misunderstandings about any terminology**, particularly in adverts*)
    - What did you do next (*Note if any misunderstandings **made them take any further action**, e.g. looking up terms online, phoning the broadband provider, asking a friend/family etc*)
    - Did you find the answers you were looking for?
    - What happened next?

- Does anything stand out as a particularly useful source of information when it comes to looking for a new broadband service?
    - Why that source in particular?
    - Was it doing anything that other sources of information weren't doing?

- Which broadband provider and package did you end up selecting?
    - Why that service in particular? (*Moderator: Do not prompt but look out for perceptions about provider, cost, speed, the use of fibre, package/bundle deals etc.*)
    - What would you say was the most important thing to look for in a broadband service? Why that in particular?

- Looking back on it, was your search for a new broadband service easier than you expected, or harder?
    - Why was that?
    - Was anything particularly difficult about the search?
    - How did you deal with that difficulty?

- Was anything surprising about your search for a new broadband service?
    - What had you expected the search to be like?
    - How different did it turn out to be?

- Did any adverts (for example, TV, newspaper, companies' own websites) stand out to you as you looked around for a new broadband service? (*Note and probe in detail in section 5*)
    - Why that in particular?
    - Were there any terms or phrases that stood out to you?
    - What did they mean?
    - What did you do next?
    - Did you look into it any further?
    - Did this influence your eventual decision to select a particular broadband package?

4. Impact of different terminology on purchase decisions (10-15 mins)

Purpose: to look at typical terminology used in adverts in isolation, without the conflating effects of other words, phrases, imagery, broadband providers etc

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Task: Word-sorting exercise

Moderator explain: We've put together a list of words that you might have seen, that relate to aspects of broadband Internet. Please think about your own priorities when choosing a broadband service and sort the words into one of three piles:

1. The most important factor when deciding which broadband package to buy (choose one or two)
2. One of a number of things to consider when deciding which broadband package to buy
3. Not important when considering which broadband package to buy

Terms used

- Customer service

- Price

- Availability in local area

- Reliability

- Fibre

- Download allowances

- Contract length

- Speed

- Package with TV and/or landline

- Brand/company

For factors that are key or part of the decision

- What made this the main / one of the consideration(s) for purchasing broadband? *(Explore fully, noting level of understanding of different terminology)*

For all terms

- What, if anything, does this mean to you?
- What's it saying / claiming?
- Is this important when it comes to broadband?

5. Impact of different terminology in specific adverts (20-25 mins)

Purpose: To look at specific adverts and note the combined impact of the various words, phrases, branding and imagery

Stimulus Material: Examples of broadband advertising using the term 'fibre'

Moderator explain: We'd like to talk about broadband adverts and your opinions about the language and images they use. To kick things off, we have some examples of adverts you might see.

Note to moderator – We are not creatively evaluating the adverts – we are seeing what respondents understand from them, what (if anything) they'd do next etc. Don't let them go down a route of 'I like this one better' due to creative elements

---

Moderator notes:

- *Do not show all adverts to all respondents*
- *Show each respondent a bundle of adverts based on one type of media – online ads OR broadcast, OR non-broadcast*
    - *Rotate bundles across respondents, and rotate order within bundles*
    - *Ensure first advert shown mentions 'fibre'*
    - *Discuss first advert in most detail then lighter touch*
    - ***Ensure at least one advert for a full-fibre service, e.g. Hyperoptic, is shown among the rest but do not draw attention to this as different. Do not show this first***
- *Note any spontaneous mentions about fibre claims across adverts*
- *At end, show respondents a website (on laptop) from a 'big name' broadband provider. Allow them to click around the site. Note spontaneous comments and questions about fibre*

Show each advert individually

- What are your first impressions of this advert?
    - What comes to mind when you look at it?
    - Why that?

- What words within this advert stand out?
    - How do you feel about those words?
    - **What do those words suggest?** *[Go through key words in advert – include 'fibre' if this is mentioned, as part of a range of words]*

- How would you describe the images / pictures used in this advert?

- **What is this advert claiming?**
    - **Why do you say that?**
    - Do you believe those claims?

- Is anything surprising or unexpected in this advert?
    - **Is anything confusing or unclear about this advert?**

Moderator: Once adverts have been shown, ask respondents to pick one or two that they find most interesting / persuasive in terms of purchasing a broadband package. Use these as a basis for teasing out the impact of 'fibre' in the adverts.

- Would any of the adverts make you seriously consider purchasing the broadband package they're offering? Can you pick one or two?

For each: Listen out for mentions of fibre and probe fully on what they understand the term to mean

- Can you talk me through why you've chosen this advert?
    - What was it about this advert that you liked the sound of?
    - What makes it stand out from the others?
    - What is it offering?
    - Which words / phrases / images in particular made this stand out?
    - Which specific part(s) of the advert are making that promise?
    - What does [specific word/phrase] mean to you?
    - **What would you do next?**

For those who are considering switching broadband provider or changing broadband package

- Has seeing this in the research session made you think differently about anything?
- Why is that?
- **Are you planning to do anything about it after the research session?** [*explore fully – are they planning taking any further action, e.g. further research, or thinking about purchasing as a result of the advert / claims about fibre?*]

For those who have recently switched broadband provider or changed broadband package

- If you had seen this advert before your recent switch, **would you have done anything differently?**
- What would you have done?
- Why is that?

6. Understanding of 'fibre' (10-15 mins)

Purpose: To probe further around the use of fibre to see if this misleads and influences consumers.

Moderators: As some of this section may have come out spontaneously in previous sections, only ask if not already covered

Explain: A lot of the adverts have used the word 'fibre'. I'd like to quickly talk about that specific word in more detail

- Have you come across the term before, in the context of broadband?
    - What does it mean?
    - Are there any other words that mean the same thing?

- What does 'fibre' mean in the adverts we've just looked at?
    - What is it referring to?
    - What does it promise?

Show adverts for full fibre, e.g. Hyperoptic, as compared to part-fibre e.g. BT

- Do the adverts make 'fibre' seem like an appealing thing?
    - Is it something you would want?
    - Why is that?

- Does 'fibre' mean the same thing in the different adverts?
    - What are the differences?
    - [If 'fibre' is part of the name – e.g. 'Sky Fibre', 'Sky Fibre Max']
        - What is this saying?
        - What is it claiming?
        - What would you do next?
        - Why / what would make you do that?

Moderators: Go back to the advert(s) they chose as most persuasive. Refer back to anything they have said about likely actions taken (purchase / research etc), and the things they take into account when considering purchase

- If we took the word 'fibre' out of these, what would you think of these adverts?
    - *[Probe around specific words used in the advert – e.g. Fast Broadband, Ultra-Fast broadband etc – refer to words in the actual advert]7*
    - Do these still have the same meaning without the word 'fibre'?

- Would the advert still be as appealing?
- Would it still be promising the same thing?

- Would you still....*[want to buy / be interested in finding out more / other action they have mentioned]*

- *For adverts that do not have the word 'fibre: [Look at words used in advert – e.g. 'superfast', 'ultrafast', 'super router']*
    - What if [this word] was not in the ad, but the word 'fibre' was used instead?
    - Would it mean the same thing, or would it be saying something else?
    - What would that mean?
    - What is the difference between [this word] and 'fibre'?
    - Would you think differently about the advert?
    - Would you do anything differently? [probe fully]

- If an advert didn't mention fibre at all, but still promised xxx [high speed / low cost / unlimited data / other factors they have identified as important in their purchase decision], would you still be interested? Why / why not?

- Anything else to say about 'fibre'?

7. Summing Up (5 mins)
- What stands out as the most important thing to think about when choosing a broadband service?
    - Why that thing?

- Does anything stand out as surprising out of the things we've talked about?

- o Why that thing?
- o Is it something you didn't know before?
- o Hearing about it now, how do you feel about it?

- Do you have any questions about broadband that haven't been answered?
  - o What are those questions?
  - o Where could you go to find answers to them?

Thank respondents for their contributions and close

Appendix 4b: Stage 2 discussion guide

> Materials:
> - Broadband advertising examples – broadcast, online and non-broadcast
> – Broadcast – to be played on laptops, with a screenshot of each printed out as backup
> – Online – to be shown online, with a screenshot of each printed out as backup
> – Non-broadcast – to be printed out

Moderators please note:

Do not mention 'fibre' to respondents until directly prompted but listen out for any spontaneous mentions. If 'fibre' is mentioned, probe on what they mean by the term.

Please ensure that you, as a moderator, are familiar with typical broadband terminology – e.g. the difference between full and part fibre. See 'crib sheet' provided.

Do not educate or correct respondents until the final section of the guide. If they don't know a lot about any aspects of broadband, reassure them that this is fine (and that you are not a technical expert either so can't answer 'technical questions'). Let them speak exactly according to their current beliefs and simply observe/record misunderstandings, do not flag them up in any way.

Introduction (2 mins)

Moderator:
- Introduce self, explain the process of market research to respondents (member of MRS, confidentiality and independence) and the format of the discussion
  - Explain that we are going to be talking about broadband internet and showing them some adverts to see which might be most appealing to them
  - We're also interested in what made them choose their broadband package, but that this is nothing to do with sales and we will not try to sell them anything
- Brief background details of respondents: First name, family details, working status, etc

Their broadband setup at home (5 mins)

Purpose: To briefly assess their general understanding of home broadband

Moderator: Explain that we are going to start by talking about the broadband they have in their homes. This isn't about what they might have at work, or while they're out of the house, just about their connection at home.

- Can you tell me a bit about your broadband package at home? (*Moderator: Note what they mention first, e.g. broadband provider, speed, reliability. Explore spontaneous reactions fully.*)
  - Who provides it?
  - How long have you had it? *(Note: Do not discuss purchase journey yet)*
  - What do you use it for? (E.g: Web-surfing, email, streaming or downloading music, movies or TV)
  - What made you choose your broadband provider / package?
  - Reliability
    - How reliable is your broadband connection? Why do you say that?
  - Cost / value for money

- Is your broadband package good value for money?
- Why do you say that? What makes it good / bad?
  - o Speed
    - Do you know how fast your broadband connection is?
    - Does this vary at all? How / when?
    - Do you know why it varies? *[Note if 'fibre' is confused with speed but do not prompt or educate]*
  - o Connection / delivery
    - Do you know how your broadband is delivered to your house? *[Explore but do not prompt, particularly if 'fibre' is mentioned]*
  - o Broadband provider
    - Do you know about different broadband providers?
    - Which broadband providers can you think of?
    - Are there any differences between these?
- On a scale of 1-10, how happy are you with your broadband at home? Why is this?

<div style="background-color:#1f70c1;color:white;font-weight:bold;">Impact of different terminology in specific adverts (10 mins)</div>

Purpose: To look at specific adverts and note the combined impact of the various words, phrases, branding and imagery

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Stimulus Material: Examples of broadband advertising (both using and not using the term 'fibre')

Moderator explain: We'd like to talk about broadband adverts and your opinions about the language and images they use. To kick things off, we have some examples of adverts you might see.

Note to moderator: We are not creatively evaluating the adverts – we are seeing what respondents understand from them, what (if anything) they'd do next etc. Don't let them go too far down a route of 'I like this one better' due to creative elements

---

Moderator notes:

- *Do not show all adverts to all respondents*
- *Show each respondent a bundle of adverts (6 ads per bundle) based on one type of media – online ads, broadcast ads + 2 websites, or non-broadcast*
  - o *Rotate bundles across respondents, and rotate order within bundles*
  - o ***Ensure <u>first</u> advert shown mentions 'fibre'***
  - o *Discuss first advert in most detail then lighter touch*
  - o ***Ensure at least one advert for a full-fibre service, e.g. Hyperoptic / CityFibre, is shown among the rest but do not draw attention to this as different. Do not show this first***
- *Note any spontaneous mentions about fibre claims across adverts*

Use following questions as a guide – spend more time on adverts that hold more interest to respondent.

Show each advert individually. After first advert:

- What are your first impressions of this advert?
  - o What comes to mind when you look at it?

- o Why that?

- Is there anything about the offer or products that stand out?
    - o What / Why?
    - o Does this look like a package you might be interested in personally?
    - o Why / why not?

- Is there anything else in this ad that captures your attention and makes you interested in what it offers?

- **What is this advert claiming?** *[Go through any elements including key words in advert that are pointed out as making a promise – include 'fibre' if this is mentioned]*
    - o **Why do you say that?**
    - o Do you believe those claims?

- Looking at some of the words in the ad, what do they suggest?

Moderator: Once adverts have been shown, ask respondents to pick one or two that they find most interesting / persuasive in terms of purchasing a broadband package. Use these as a basis for teasing out the impact of 'fibre' in the adverts.

- Would any of the adverts make you consider purchasing the broadband package they're offering or looking into the offer further? Can you pick one or two?

For each: Listen out for mentions of fibre and probe fully on what they understand the term to mean

- Can you talk me through why you've chosen this advert?
    - o What was it about this advert that you liked the sound of?
    - o What makes it stand out from the others?
    - o What is it offering?
    - o Which words / phrases / images in particular made this stand out?
    - o Which specific part(s) of the advert are making that promise?
    - o What does [specific word/phrase] mean to you?
    - o **What would you do next?**

- Is there anything you can see offered in the other ads that you would like included in the ones you have chosen?
    - o What is this?
    - o Why do you say that?
    - o What is particularly appealing about this element?

Understanding and use of 'fibre' in advertising (5 mins)
Purpose: To probe further around the use of fibre to understand the extent to which influences consumers and potential for being misled

Moderators: As some of this section may have come out spontaneously in previous sections, only ask if not already covered

Explain: A lot of the adverts have used the word 'fibre'. I'd like to quickly talk about that specific word in more detail

- Have you come across the term before, in the context of broadband?
  - What does it mean?
  - Are there any other words that mean the same thing?

- What does 'fibre' mean in the adverts we've just looked at?
  - What is it referring to?
  - What does it promise?

- Had you noticed that some ads mention fibre and some do not?
  - Does it make any difference to you in terms of which services you would consider further?
  - Why/why not?
  - *Note if respondents raises any questions when idea of 'either part or all' is introduced. If questions raised, explain that we'll come to the differences shortly.*

Display all examples [not grouped by type].

- Which stand out to you as services you'd be more interested in?
- How much of a difference, if at all, does the word 'fibre' make in the advert(s) for the service?
  - Does it make you prioritise/prefer this service over another or not?
  - Why is that?

Check whether advert contains words such as 'superfast', 'ultrafast', 'super router' etc

- What if [this word] was not in the ad, but the word 'fibre' was used instead?
  - Would it mean the same thing, or would it be saying something else?
  - What would that mean?
  - What is the difference between [this word] and 'fibre'?
  - Would you think differently about the advert?
  - Would you do anything differently? [probe fully]

- Looking across the ads, does 'fibre' mean the same thing in the different adverts?
  - What are the differences?
  - Probe where 'fibre' is combined with the brand name – e.g. 'Sky Fibre', 'Sky Fibre Max']
    - What is this saying / claiming?

Moderators: Go back to the advert(s) they chose as most persuasive. Refer back to anything they have said about likely actions taken (purchase / research etc), and the things they take into account when considering purchase

Ask next two questions only if there is time

- If we took out the word fibre (bearing in mind nothing else changes about what the advert is offering/saying) what would you think of then?
  - Would you have any questions?'

- When looking at broadband packages and information about them, how interested are you in the line that delivers the broadband to your home?
    - Why / why not?
   - How important is it to you overall in deciding which to purchase?

Impact of information about fibre and part-fibre services (5 mins)

Explain: To explain a little more about how different broadband services work

Hand respondents a print-out o (as below) and read through it with them. Explain that they can ask questions at any time if anything is unclear.

There are different ways to deliver broadband services to a household:

The traditional way, and still the most common way, is to use copper telephone lines. This service is available to anyone who has a telephone line.
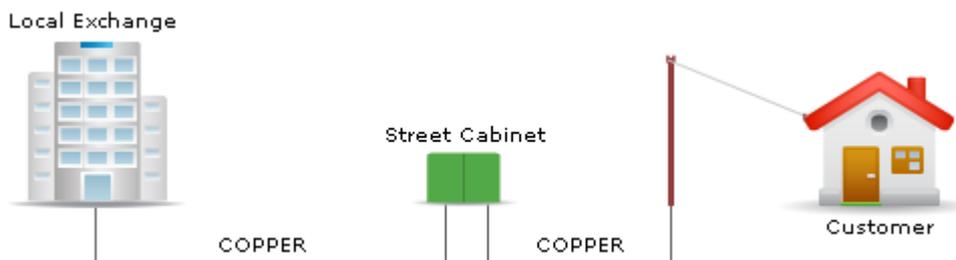
In recent years it has become increasingly common to use fibre optic cables to carry the signal to the street cabinet, with the final connection to the house still using the copper telephone lines (for Virgin services, the cables they use to deliver cable TV replace the copper telephone lines). This service is available to most people.
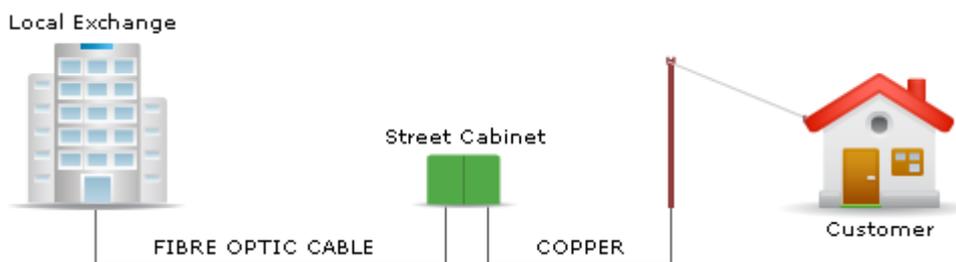
Most recently, services have been developed that use fibre optic cables for the whole journey, right the way to the home. This service is currently available to around 2% of households but is likely to become more widely available in coming years.

FIBRE OPTICS - BYPASSING ALL COPPER CABLES

- Of the adverts we've looked at, can you tell which service is which?
  - Does this matter to you personally?
  - Why / why not?

- Does knowing more about these variations in delivery method change your opinion of anything we've looked at or discussed so far? Does it make you think the same or differently about any of the adverts?
  - Why / why not?

If respondent raises that the distinction should be made clear, ask:

- Knowing this, would you like to see any changes to the ads we have looked at?
  - Please explain why
  - *Prompt on any further changes*
  - *Prompt on availability – If suggesting changes -* What difference, it at all, does it make to you that cables to the home are currently only available to about 2% of households?

Performance differences

In general, the more fibre there is in a broadband service, the faster and more reliable it will be. The signal gets weaker the longer it has to travel over copper (and, to a lesser extent, cable). This means that for services that use copper, the speed you get will depend on how far you are from your street cabinet.

The speed can also vary depending on how many other customers are using the service at the same time. Services that only use fibre deliver the same speed to every customer no matter where they live, and aren't affected by how many people are using the service.

- Does knowing more these performance differences change your opinion of anything we've looked at or discussed so far? Does it make you think the same or differently about any of the adverts?
  - Why / why not?

If respondent raises that the distinction should be made clear, ask:

- Knowing this, would you like to see any changes to the ads we have looked at?
  - Please explain why

    o *Prompt on any further changes*
    o *Prompt on availability – If suggesting changes -* What difference, it at all, does it make to you that cables to the home are currently only available to about 2% of households?

Summing Up (2 mins)

Use list –Customer service, Price, Availability in local area, Reliability, Fibre, Download allowances, Contract length, Speed, Package with TV and/or landline, Brand/company

- As we're out of time, to finish up on our discussion, going back to advertising broadband services generally: for you personally, what is the <u>most important thing to think about</u> when choosing a broadband service? (*Show list)*
- Why that?
- Does anything else stand out as particularly important?
- Why that?
- How important is fibre?
- Why?