

# Consumer understanding of broadband terminology - Technical Report

## Survey objectives

The core aims of this study are:

- To understand what, if any, additional information on broadband technology consumers would find useful in ads and at point of sale, specifically to:
  - Test whether clearer information on the delivery method for broadband services may be useful to consumers once broadband terms are explained.
  - Establish, when consumers are deciding which broadband provider and product to purchase, the relative degree of usefulness of having descriptions of the underlying technology and its capabilities included in marketing materials and at point of sale vs. other factors considered.
  - Test what this information would be and at what point in the purchase journey it would be useful.

## Sampling approach and sample achieved

An initial qualitative pilot was conducted via video calls to help inform the descriptions of four broadband services to be assessed during the quantitative stage.

The main quantitative stage was conducted using an online panel and river sampling approach, providing a cost-effective and efficient means to reach the audience consulted for this study. As the research is specifically about fixed broadband internet services, an online approach was deemed to be acceptable.

Targets were set by demographics, full fibre broadband availability, and ISP. Targets were set for fibre broadband availability and ISP to ensure that a minimum number of interviews per cell was achieved for the purposes of analysis. Respondents in the devolved nations and with full fibre availability were oversampled to ensure robust bases for analysis.

We invited the targeted sample to take part in the research from which respondents were screened for broadband decision making for their household. The achieved interviews were as per the table below:

|                           | Achieved |
|---------------------------|----------|
| <b>Total</b>              | 1155     |
|                           |          |
| <b>Gender</b>             |          |
| Male                      | 541      |
| Female                    | 612      |
|                           |          |
| <b>SEG</b>                |          |
| ABC1                      | 678      |
| C2DE                      | 477      |
|                           |          |
| <b>Age</b>                |          |
| 16-34                     | 309      |
| 35-64                     | 598      |
| 65-74                     | 178      |
| 75+                       | 70       |
|                           |          |
| <b>Nation</b>             |          |
| England                   | 801      |
| Scotland                  | 121      |
| Wales                     | 129      |
| NI                        | 104      |
|                           |          |
| <b>English region</b>     |          |
| North                     | 208      |
| Midlands                  | 251      |
| South                     | 342      |
|                           |          |
| <b>Fibre in area</b>      |          |
| Full fibre available      | 545      |
| Full fibre not available  | 562      |
|                           |          |
| <b>Broadband supplier</b> |          |
| BT/EE/PlusNet             | 393      |

|              |     |
|--------------|-----|
| Sky          | 287 |
| Virgin Media | 178 |
| TalkTalk     | 128 |
| Other        | 137 |

The survey was conducted from 7th – 14th November 2022 and comprised a total of 1,155 interviews.

## Weighting and sample efficiency

The final data was weighted to be nationally representative on gender, age, SEG, nation, macro English region and full fibre availability. The profile for fibre availability was derived from internal Ofcom data.

|                       | Achieved    |            | Weighted profile | Weighting factor |
|-----------------------|-------------|------------|------------------|------------------|
|                       | n           | %          | %                |                  |
| <b>Total</b>          | <b>1155</b> | <b>100</b> | <b>100</b>       |                  |
|                       |             |            |                  |                  |
| <b>Gender</b>         |             |            |                  |                  |
| Male                  | 541         | 47%        | 49%              | 1.05             |
| Female                | 612         | 53%        | 51%              | 0.96             |
|                       |             |            |                  |                  |
| <b>SEG</b>            |             |            |                  |                  |
| ABC1                  | 678         | 59%        | 53%              | 0.90             |
| C2DE                  | 477         | 41%        | 47%              | 1.14             |
|                       |             |            |                  |                  |
| <b>Age</b>            |             |            |                  |                  |
| 16-34                 | 309         | 27%        | 30%              | 1.12             |
| 35-64                 | 598         | 52%        | 49%              | 0.95             |
| 65-74                 | 178         | 15%        | 12%              | 0.78             |
| 75+                   | 70          | 6%         | 9%               | 1.49             |
|                       |             |            |                  |                  |
| <b>Nation</b>         |             |            |                  |                  |
| Scotland              | 121         | 10%        | 9%               | 0.86             |
| Wales                 | 129         | 11%        | 4%               | 0.36             |
| NI                    | 104         | 9%         | 2%               | 0.22             |
|                       |             |            |                  |                  |
| <b>English region</b> |             |            |                  |                  |
| North                 | 208         | 18%        | 24%              | 1.31             |
| Midlands              | 251         | 22%        | 26%              | 1.21             |
| South                 | 342         | 30%        | 35%              | 1.19             |
|                       |             |            |                  |                  |

| <b>Fibre in area</b>     |     |     |     |      |
|--------------------------|-----|-----|-----|------|
| Full fibre available     | 545 | 47% | 35% | 0.74 |
| Full fibre not available | 562 | 49% | 60% | 1.23 |
| Prefer not to say        | 48  | 4%  | 5%  | 1.20 |

The total data has a weighting efficiency of 84%.

## Guide to statistical reliability

The variation between the sample results and the “true” values (the findings that would have been obtained if everyone aged 16+ in the UK had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times that a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chances are 95 in 100 that the “true” values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size<sup>1</sup> (ESS) rather than actual sample size to judge the accuracy of results. The ESS for the total sample size of 1,155 is 967.

## Note on current fixed broadband service

The household’s current fixed broadband service used was respondent-reported and, as demonstrated by matching of postcode data for full fibre availability, we can see that some respondents mistakenly believed they had a full fibre (FTTP) service in areas where it is not currently available.

---

<sup>1</sup> Effective Sample Size shown as Effective Base in the data tables produced.