Gigabit capable broadband comms testing research

April 2021

Background and aims of the research

Background

By 2025 85% of households should have access to gigabit-capable broadband. However, supply is just one half of the market. In order to help ensure that consumers are enabled to adopt gigabit-capable broadband the Gigabit Take-up Advisory Group (GigaTAG) was convened in August 2020. The GigaTAG is comprised of Which?, the Confederation of British Industry (CBI) and the Federation of Small Businesses (FSB). This research feeds into the final GigaTAG report, which sets out to government the GigaTAGs' recommendations to maximise the take-up of gigabit-capable broadband.

Aims

The interim GigaTAG report identified that there were a number benefits of gigabit-capable broadband that could be communicated to consumers to persuade them to switch. The main aim of this research was to identify which of these messages resonate most with consumers and whether this differs between different groups of consumers. We also wanted to find out what the optimum combination of communication messages is that persuades consumers of the benefits of gigabit-capable broadband.

Gigabit-capable broadband: other consumer research

This piece of research is part of a wider programme of research which informed the identification of barriers to adoption of gigabit-capable broadband and proposed solutions. The other papers are:

- **Which? (2021) Consumer barriers to gigabit-capable broadband adoption:** a quantitative general population survey which provided insights into consumer likelihood to adopt gigabit-capable broadband and barriers to adoption.
- **Which? (2021) Icon see clearly now: using an icon to help consumers identify gigabit-capable broadband packages:** a quantitative (experimental) general population survey to test the impact of a 'Gigabit-ready Mark' (an icon) on consumers' ability to correctly identify broadband packages on a gigabit network.

Methodology

- Yonder, on behalf of Which?, surveyed 2,103 UK adults online between the 19 and 20 April 2021. Data were weighted to be demographically representative of the UK population. Respondents who qualified for the survey were decision makers (either primary or joint) about their household broadband. The sample size for this group was 1,933.
- We used two statistical analyses within this research – maximum difference (max diff) scaling and total unreplicated reach and frequency (TURF) analysis. Max diff examines how consumers decide between a number of competing options and allows you to create a ranked hierarchy of their preferences. We used this approach when analysing the relative appeal of a number of benefits of gigabit-capable broadband. TURF analysis identifies the best mix of messages by determining the combination which appeals to the widest proportion of consumers. We conducted this analysis on the ranked list of gigabit-capable broadband benefits to understand the mix of messages with the widest reach. Technical notes explaining these methodologies in further detail are available on pages 10 and 16.
- *Note: some net percentage scores may appear to higher or lower than the sum of the individual results. This is due to rounding of the data; the nets are correct.*

Key findings

Key Findings: Which messages are the most effective?

The increased reliability of gigabit-capable broadband was more appealing to consumers than increased speed

We asked consumers to rank a list of benefits of gigabit-capable broadband from highest to lowest in terms of their positive impact on their likelihood to switch to gigabit. Survey respondents ranked the benefit of increased reliability higher than the benefit of increased speed. This suggests future messaging about gigabit-capable broadband would benefit from referencing the increase in reliability that consumers will experience.

The most convincing benefit overall referenced both increased reliability and increased speed

The benefit consumers ranked the most appealing overall described both the increased reliability and increased speed of gigabit-capable broadband compared to a traditional connection. This was also true across a number of sub-groups – including those with slow internet (download speeds of 9Mbps or slower), those with fast internet (download speeds of 25Mbps or faster), those aged 18-34 and both early and late tech adopters.

Key Findings: Which messages are the most effective?

Providing an example makes the benefit of increased speed more understandable

The list of benefits we provided to consumers included separate statements that referenced the increased speed of gigabit-capable broadband, one with an example and one without. Consumers ranked the benefit of increased speed with an example (the ability to download a high definition film in under 1 minute) as more appealing than the straight description of speeds in terms of Gbps without an example. This suggests consumers are better able to understand the benefit of speed when they are provided with an example.

Messages describing the future proofing benefits of gigabit-capable broadband are more convincing when referencing recent changes

We tested three messages describing the future proofing benefits of gigabit-capable broadband. The message which resonated the most out of these three described how gigabit-capable broadband will support connectivity needs for years to come and referenced the rapid change in working from home over the last year. The least resonant future proofing message referenced the capability for it to deal with new technologies, like virtual reality.

Key Findings: What combination of messages is the most effective?

The combination of increased reliability and increased speed is a powerful message

Within the survey we tested messages that included illustratory examples of how the increased speed and increased reliability of gigabit would benefit consumers. The TURF analysis identified that communicating the two benefits of gigabit-capable broadband of (1) increased reliability and (2) increased speed, with an example of what this meant in practice, would appeal to 68% of consumers.

It is important to consider future proofing messaging in context

When tested in isolation, the future proofing message which best resonated with consumers was how gigabit-capable broadband will support consumers' connectivity needs for years to come. However, the TURF analysis showed that a different future proofing message most increased reach when used alongside the combination described above of increased speed and reliability. The best message to add to this combination to appeal to the widest proportion of consumers described how the more people that switch to gigabit-capable broadband, the quicker the roll out can happen which will benefit the whole of the UK.

Which messages are the most effective?

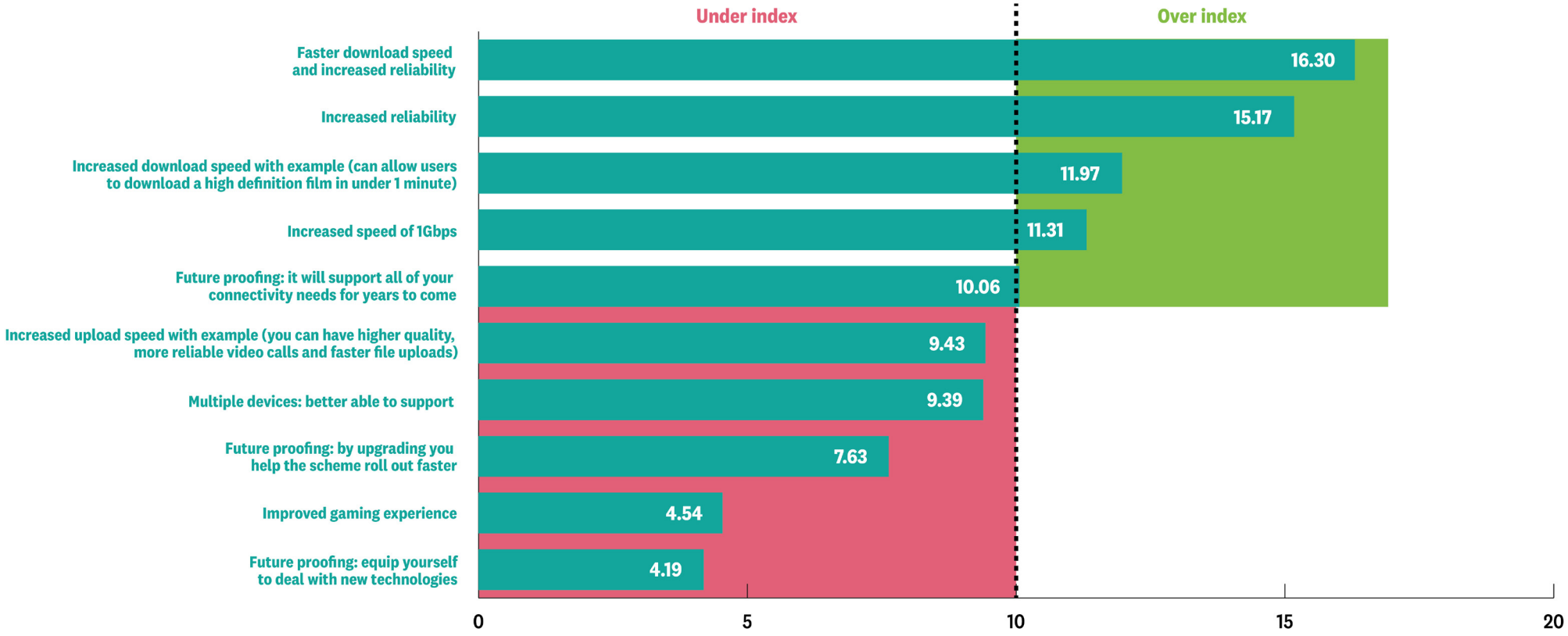
Technical note: max diff analysis

- We showed respondents 10 benefits of gigabit-capable broadband, covering the areas of: increased download speed, the potential for increased upload speed, the increase in connection reliability, future proofing, the benefits to online gamers and the benefit for households with multiple users/ devices connected. Slides 20–23 show the full wording of these statements.
- We used max diff analysis to establish a hierarchy demonstrating the persuasiveness of the different benefits for consumers. We asked respondents to rank the 10 benefits. This process was split across several questions. Respondents picked benefits that had (1) the most and (2) the least impact on their desire to take up gigabit. Using max diff analysis allowed us to formulate a ranked list that is more accurate and considered than one simple ranking question. The scores shown are the probability that each benefit was chosen to be the one with the most impact, with the total summing to 100. As we tested 10 benefits, those with scores higher than 10 over index on importance – those with scores lower than 10 under index.

Results of the max diff analysis – total sample

- The following slide shows the full results of the max diff analysis amongst the total sample (n= 1,933). The benefits of gigabit-capable broadband are ranked from highest to lowest in terms of their likelihood to have the most impact on consumers to switch to a gigabit-capable connection.
- The scores for each benefit are represented as indices, which have a proportional relationship with each other. That means the lowest ranked benefit, with an index score of 4.19, is just under 4 times less appealing than the highest ranked benefit of 16.30.
- The results show that consumers ranked the benefit of increased reliability higher than the benefit of increased download speed when they are described separately, which you can see by comparing the first two rows (benefits referencing reliability) with the two following rows (benefits referencing speed).

Ranked list of gigabit-capable broadband benefits



Gigabit-capable broadband benefits – impact on takeup
Total sample

Q: Please indicate which you think would have the most positive impact and which would have the least positive impact on your likelihood to switch to gigabit-capable broadband, if it was available to you.
Base: Internet decision makers (1.933).

Results of the max diff analysis – sub group analysis

- We also analysed the results of the max diff analysis amongst different subgroups of consumers.
- The following slide (n=316) shows the full results of the max diff analysis amongst consumers who have a slow download speed (up to 9 Gbps).
- We identified respondents with slow download speed using the results of a download speed checker which respondents completed during the course of the survey.
- Increased reliability was still a more convincing benefit than increased speed for those whose internet download was 9Mbps or slower. Given this, the use of increased speed alone as a selling point for gigabit-capable broadband should be carefully considered.
- The table on slide 15 shows the ranking of the top 5 benefits amongst various subgroups. The green shading highlights that the benefit combining both faster download speed and increased reliability ranks the highest across a wide number of consumer groups.

Increased reliability was still a more convincing benefit than increased speed for those whose internet download was 9Mbps or slower

Gigabit-capable broadband benefits – impact on takeup
Sample: those with slow download speeds

Q: Please indicate which you think would have the most positive impact and which would have the least positive impact on your likelihood to switch to gigabit-capable broadband, if it was available to you.
Base: Internet decision makers with slow internet – up to 9Mbps (316).

The message combining faster speed and reliability resonates most across many subgroups

	Ranking of message in terms of impact on gigabit takeup				
Subgroup	Faster download speed and increased reliability	Increased reliability	Increased download speed with example (can allow users to download a high definition film in under 1 minute)	Increased speed of 1Gbps	Future proofing: it will support all of your connectivity needs for years to come
Total	1	2	3	4	5
Those with slow speed (316)	1	2	3	4	5
Those with fast speed (69)	1	2	3	6	4
Age 18–34 (503)	1	2	3	4	5
Age 65+ (481)	1	2	5	4	3

Technical note: TURF (total unreplicated reach and frequency) analysis

- The results of the TURF analysis show you the combined reach of a mix of Gigabit messages in terms of appeal to consumers.

How the analysis works

- Whilst the MaxDiff analysis identifies the impact of each message in isolation, the TURF analysis identifies the impact when messages are considered in combination. It could be that a set of popular messages all appeal to the same group of people, so the best combination may not be a mix of the most popular messages. TURF considers how the appeal of each message overlaps with others and then identifies, in iteration, the next best message to add which will most increase the reach. TURF identifies where the biggest gains are and isolates the point of diminishing return.

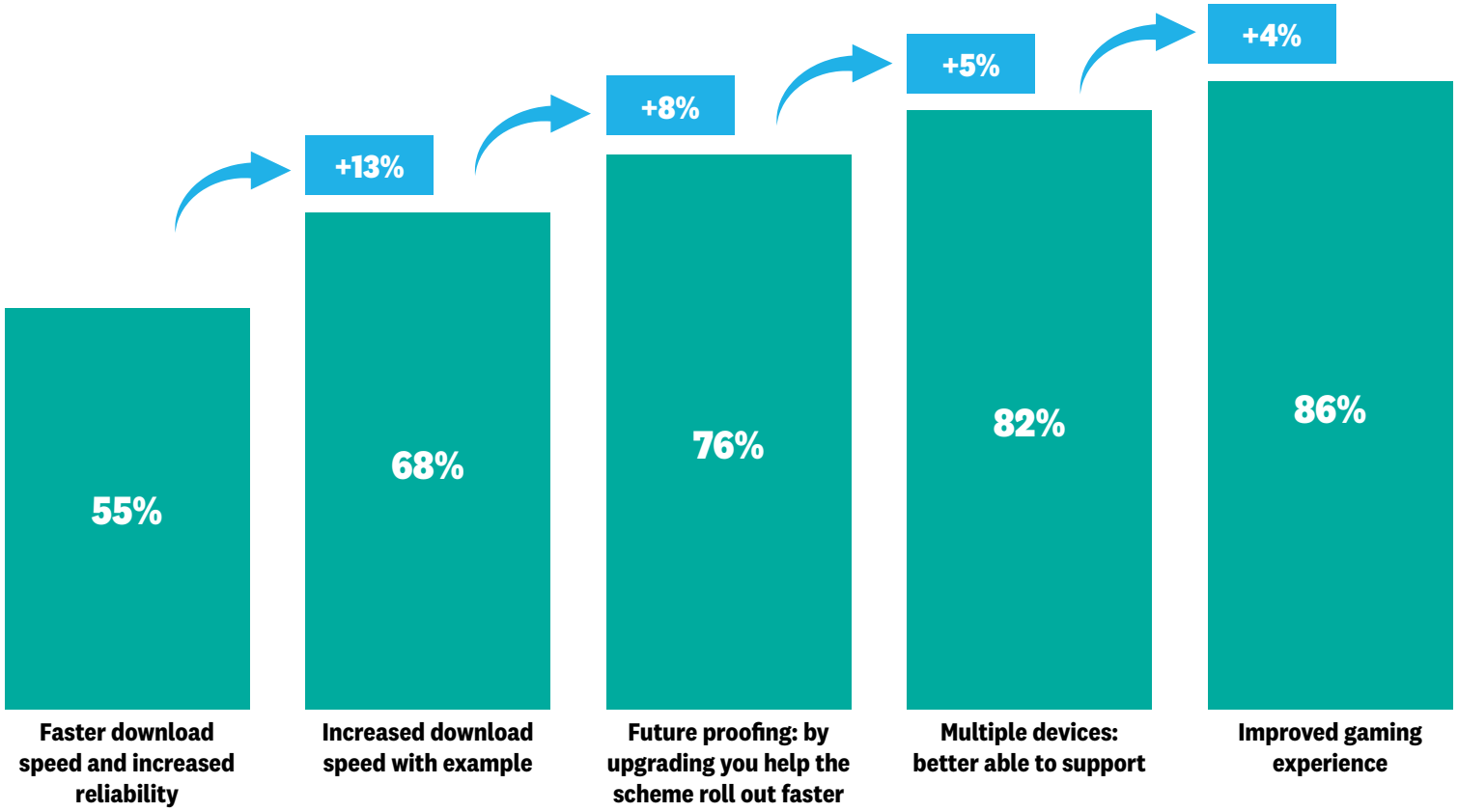
Technical note: TURF (total unreplicated reach and frequency) analysis

How to read the results

- In the following graph, the first column shows the message which has the biggest impact on consumer's likelihood to switch if you choose only 1 message. The second column shows the message which has the biggest impact if you choose just 2 messages in combination. This is then true of the third, fourth and fifth column.
- The other 5 messages not included represented a diminishing rate of return (each had an added reach of <4% of decision-makers).
- The results show that the two messages that in combination appeal to the widest range of consumers describe the increased reliability and increased speed of gigabit-capable broadband, and provide an example of the benefits of increased speed. This combination appeals to 68% of consumers. Adding a third message describing how by upgrading, you help the scheme roll out faster, appealed to 76% of consumers.

You are able to reach three quarters (76%) of consumers by combining the messages of faster speed, increased reliability, and helping the scheme roll out faster

Gigabit-capable broadband benefits – impact on takeup – Total sample



Increase in reach by adding the additional message

Reach

Q: Please indicate which you think would have the most positive impact and which would have the least positive impact on your likelihood to switch to gigabit-capable broadband, if it was available to you.

Base: Internet decision makers (1,933):
Note: the increase scores may appear to be higher or lower than the manual calculation. This is due to rounding of the data.

Appendix

Full wording of benefits:

- **Increased speed of 1Gbps:** Gigabit-capable broadband provides download speeds of up to 1Gbps (1000 megabits per second). This is over 10 times faster than today's average broadband download speed.
- **Increase download speed with example of what that means in practice:** Gigabit-capable broadband provides speeds of up to 1Gbps (1000 megabits per second), which can allow users to download a high definition film in under 1 minute. This is over 10x faster than today's average broadband download speed. These faster speeds can also help address issues like buffering.
- **Increase upload speed with example of what that means in practice:** Gigabit-capable broadband may also offer better upload speeds, meaning that you can have higher quality, more reliable video calls and faster file uploads.

Full wording of benefits:

- **Faster download speed and increased reliability:** Gigabit-capable broadband not only provides your household with faster speed, but it can also provide a much more reliable service. As well as experiencing much faster download speeds than an average internet connection, you are much less likely to experience service drop outs or service quality issues.
- **Increased reliability:** Gigabit-capable broadband is delivered to your home through a more reliable infrastructure so you will be very unlikely to experience any speed or connection issues. You'll be able to do everything you want to do with your connection smoothly.
- **Multi devices: better able to support:** Your internet connection may be shared by many people and many devices. Gigabit-capable broadband will ensure there's enough bandwidth for everyone and everything. This means that your connection performs well, even if there are lots of devices connected at the same time.

Full wording of benefits:

- **Future proofing; it will support all of your connectivity needs for years to come:** The country's broadband usage and requirements have changed a lot over the last 12 months, with working from home now more common. Upgrading to gigabit broadband allows you to future proof your broadband by supporting all of your connectivity needs for years to come, as more high demand services are developed.
- **Future proofing; equip yourself to deal with new technologies:** Technology changes how products and services are delivered to you and consumed. Having gigabit-capable broadband will enable you to use new services at the forefront of technology – such as Virtual Reality, AI-powered devices and more.

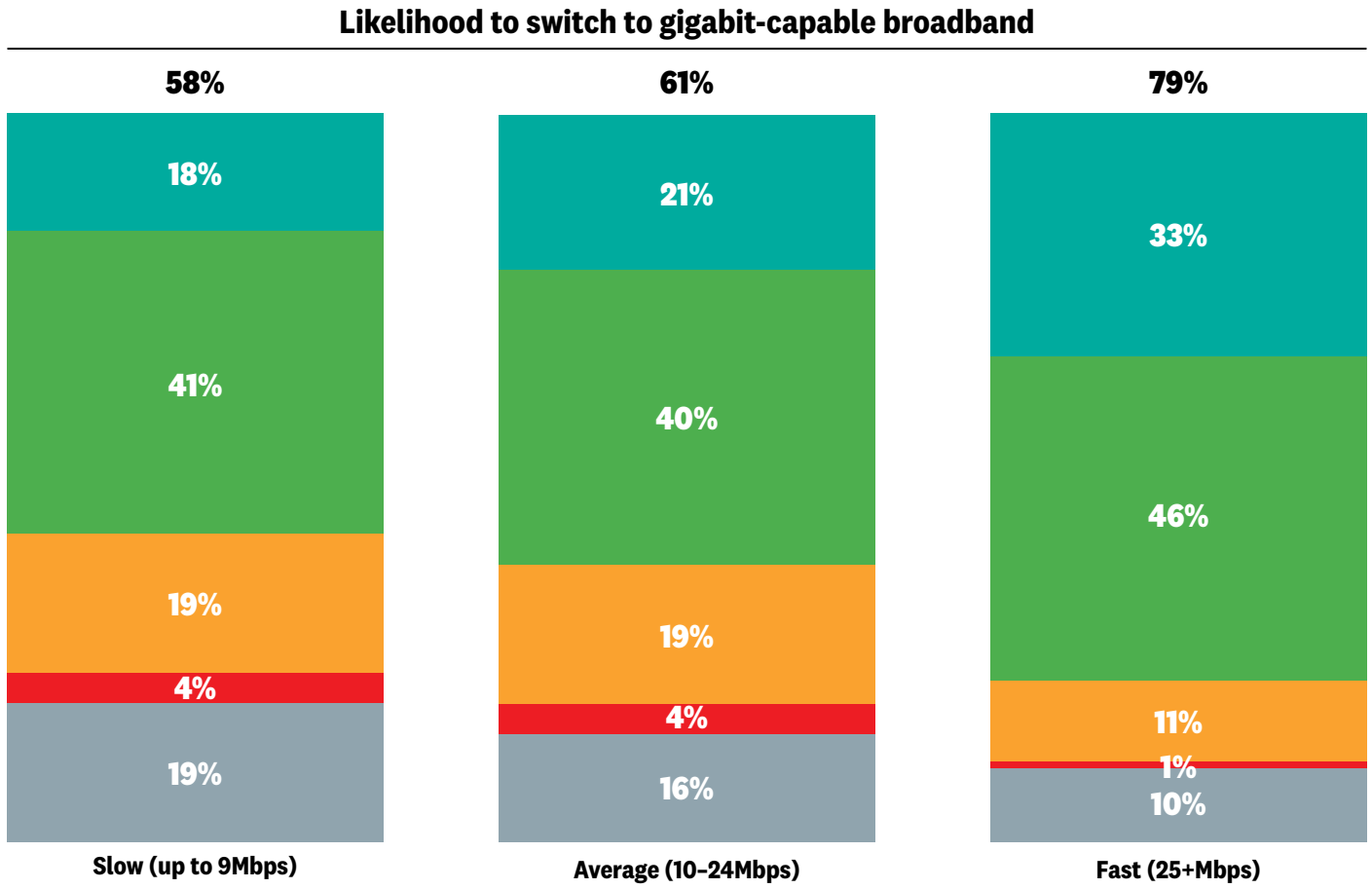
Full wording of benefits:

- **Future proofing; by upgrading you help the scheme roll out faster:** The government wants to encourage and support the roll out gigabit-capable broadband as it will have wider economic and societal benefits, including enhanced productivity and enable new business opportunities. The more people that switch to gigabit-capable broadband, the quicker the roll out can happen which will benefit the whole of the UK.
- **Improved gaming experience:** Are you – or someone in your household – an online gamer? Gigabit-capable broadband allows you to have a high quality gaming experience, with reduced lag and the ability to download games in minutes. The potential for higher upload speeds also makes live streaming much easier.

Technical note: speed checker test

During the course of the survey, we asked half the sample to check their download speed using the Which? tool (*https://broadbandtest.which.co.uk/*). Respondents then provided us with the details of their download speed. The following slide shows the difference in perceived likelihood to switch to gigabit-capable broadband split by respondent download speed.

Those with the highest download speeds (25+ Mbps) were significantly more likely to want to switch to gigabit than those with lower speeds



Q: Imagine your current broadband contract was coming to the end, and gigabit-capable broadband was available in your area. How likely would you be to switch to a gigabit-capable broadband package?

Base: Those who entered a download speed (828):
Slow – up to 9 Mbps (316)
Average – 10-24 Mpbs (443)
Fast – 25+ (69)