Which?

RESEARCH REPORT JUNE 2021

Consumer barriers to adopting gigabit-capable broadband

Executive summary

The UK government has set out its ambition that at least 85% of the UK should have access to gigabit-capable broadband by 2025. However, while supply is a necessary factor in driving this broadband adoption, it is not sufficient. Demand is also required to realise the benefits of investment in these networks.

Stimulating consumer demand for new technology in the broadband market is, however, a challenge. For example superfast broadband is available to 96% of premises in the UK yet, of those which it's available to, only 60% have adopted it.[1] Increased speed – the benefit of superfast connections and one of the main advantages of gigabit-capable broadband – does not tend to 'pull' consumers to engage in the broadband market. This is because consumers are mostly satisfied with the performance of their packages and therefore aren't motivated to engage with the market; they feel that what they have meets their household's needs.[2]

It is in this context that industry, government and the regulator will have to work to persuade consumers of the benefits of a gigabit-capable connection and to address the barriers they face, of which cost is particularly important.

When consumers engage in the broadband market they are often looking to achieve better value or to keep costs down.[3] Correspondingly, one of the biggest barriers to consumers adopting gigabit-capable broadband is if it costs more than they are paying now. For some this is about willingness to pay (36%), and for others it's an issue of affordability (23%). Reinforcing the concern about cost is that consumers are put off adopting gigabit-capable broadband as they are worried about paying more than expected (19%).

Underlying the low willingness to pay is that consumers aren't yet convinced of the benefits of gigabit-capable broadband (and thus persuaded that it's worth paying more for). Not perceiving the need for faster or more reliable broadband is, in addition to cost, the biggest barrier facing consumers (21%).

Outside of these main barriers there are numerous others which will combine to undermine adoption. Most of these reflect barriers which deter people from engaging in the broadband market in general and are not exclusive to consumers adopting gigabit-capable connections. These include consumers' preference for the status quo, risk aversion (related to fear of losing service when switching and or ending up with a worse connection) as well as difficulties related to choosing packages due to broadband terminology. However, in addition, consumers say that not being clear how gigabit-capable connections are different to other broadband connections is a barrier to their adopting it. This relates to the need for consumers to become aware of the stated benefits of gigabit-capable connections, compared to others, and to be convinced of those benefits.

1 Ofcom (2020) Connected Nations 2020 UK report.
2 Which? (2018) Consumer engagement with the broadband market.
3 Which? (2018) Consumer engagement with the broadband market.

As part of our research we looked at how specific barriers may be more likely for different groups of consumers.

Our research indicates that consumers with a disability may be more likely to face certain barriers than those without a disability.[4] When thinking about all barriers there doesn't appear to be a difference in the perception of benefit between people with disability and people without. However there are indications that some practical and behavioural factors may be more likely for those with disabilities. These include:

- speaking to providers;
- it being too much hassle/time consuming to find a package and switch;
- it being hard to choose a package because of terminology;
- not having the headspace to engage; and
- concern over loss of service and or ending up with a worse connection.

We also looked at whether the rate of adoption of gigabit-capable broadband may differ between consumer groups. As with any new technology there will be an adoption curve where some consumers – the 'early adopters' – will be quicker than the average consumer in purchasing a gigabit-capable broadband package, whilst others will be slower.

Our research suggests that the groups who may be slower to adopt than their counterparts are:

- older adults (65+years);
- small households (one or two person);
- households who feel their broadband meets their needs; and
- households with low income (less than £21k).

Cost and perceived need are still the top barriers for these groups. However, older adults additionally indicate a preference for the status quo, reflected in wanting to stick with their current broadband as it's 'tried and tested' (22%). This could pose a problem as not all providers will initially provide gigabit-capable connections.

For older adults, small households and households who feel their broadband meets their needs the lack of perceived need is a particular challenge to adoption. They are more likely to cite not needing faster or more reliable broadband as a top barrier to adopting gigabit-capable broadband than their counterparts.[5] Reflecting this, it's more likely that it's a case of not being willing to pay more that puts them off compared to not being able to afford to pay more.

This contrasts with those consumers in low income households. When considering their top barriers, lack of perceived need is amongst the top, but they are not significantly more likely to say this than those who are not in low income households (23% v 21%).

Instead it is the affordability barrier which is most important for people in low income households. They are twice as likely to say that affordability would be a top barrier, than those who are not in a low income household (38% v 16%). Indeed, they are more likely to say that the barrier is affordability, rather than willingness to pay. This does not mean that if they were able

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4 More research would be needed to determine whether there is support for different barriers by groups – the specific samples here are not representative of those groups and include some small sample sizes.
5 There was also a significant difference for consumers in low income households compared to consumers not in low income households, but unlike the other groups the percentage point difference was not large (5 percentage points).

to afford it, they would be willing to pay – there is still a high proportion (26%) in this group who say that a barrier is that they simply don't want to pay more for their broadband, even though they could afford to.[6] However it does mean that even if those who can't afford it were convinced of the benefits it's unlikely that, without financial help, they would be able to adopt it.

Our research shows that whilst gigabit-capable broadband can offer advantages to consumers there is not currently mass demand for it, and consumers face many barriers to adoption. The most pressing barriers for industry and policy-makers to address are those of cost and perceived need. For consumers to be motivated to adopt a gigabit-capable connection they need to be convinced of the relative benefit of gigabit-capable connections, including that it is worth any additional cost.

Industry and other stakeholders should also consider who may be left behind in the move to gigabit-capable connections and how to help these consumers overcome the barriers they face.

The GigaTAG, comprising of Which?, the Confederation of British Industry (CBI) and the Federation of Small Businesses (FSB) has developed and set out recommendations in their final report for how barriers facing consumers can be mitigated.[7]

6 Participants in the survey were not allowed to answer both that they could not afford to pay more and that they were not willing to pay more. They had to choose the one that was most reflective of their position.

7 Which?, CBI and FSB (June 2021) Gigabit Take-up: Final Report.

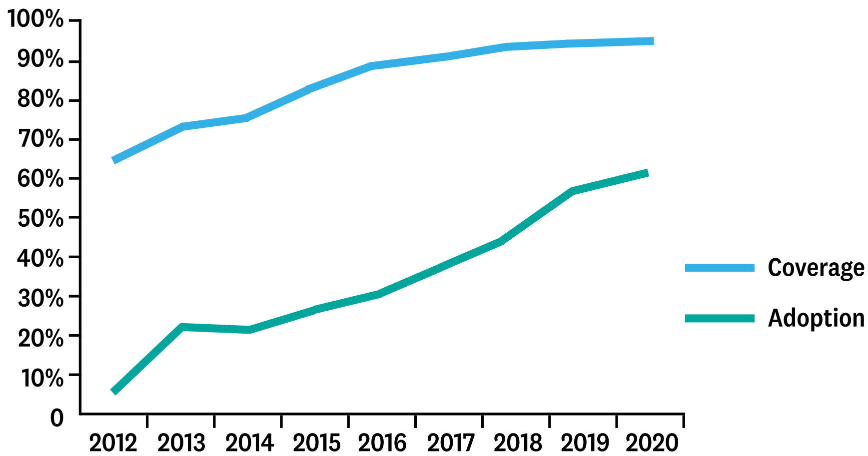
1. Introduction, aims of the research and methodology

1.1. Introduction

The UK government has set out its ambition that at least 85% of the UK should have access to gigabit-capable broadband by 2025. It is seeking to accelerate the rollout further to get as close to 100% as possible. However, while supply is a necessary factor in driving gigabit broadband adoption, it is not sufficient. Demand is also required to realise the benefits of investment in these networks.

Consumers' adoption of newer technology in broadband is, however, historically slow. Superfast broadband was launched in January 2010 and in 2012 it had 65% coverage, yet only 7% of those premises who were able to adopt it had.[8] Ten years later and it is now available to 96% of premises. Over this time there has been a slow increase in adoption but still only 60% of premises where it is available subscribe (as can be seen in chart one).[9]

Chart one: coverage and adoption of superfast broadband between 2012 and 2020.[10]



The slow adoption of superfast broadband is evidence that the incentive of faster broadband is unlikely to be sufficient to prompt the majority of people to adopt gigabit-capable services. This is especially the case if it comes with a price tag. Previous research has found that consumers often aren't motivated to engage in the broadband market as they are generally happy with their service.[11]

In addition to the lack of 'pull' of faster broadband, consumers face many barriers to engaging in the broadband market. For example the market itself is perceived by consumers to be complex and risky and they often don't feel confident engaging it.[12]

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8 Ofcom (2012) Communications Infrastructure Report 2012
9 Ofcom (2020) Connected Nations Report
10 Source: Ofcom Communications Infrastructure Reports 2012-2014 and Ofcom Connected Nations Reports 2015–2020.
11 Which? (2018) Consumer engagement with broadband.
12 Which? (2018) Consumer engagement with broadband.

The research in this report was conducted to explore consumer attitudes to adopting gigabit-capable broadband: their stated preference to adopting it (or not), the barriers they face and their relative importance.

1.2. Aims of the research

In August 2020, the government asked Which?, the Confederation of British Industry (CBI) and the Federation of Small Businesses (FSB) to convene the Gigabit Take-up Advisory Group (GigaTAG). The GigaTAG set out to develop a set of recommendations to help support consumer and business migration to gigabit-capable networks and the services they deliver, including those which are gigabit-capable, as soon as possible. It aims to help ensure that the wide ranging benefits of these networks are realised.

This research aimed to inform the GigaTAG's understanding of consumers' likelihood to switch to gigabit-capable broadband and the specific barriers consumers face in adopting these connections. In order that they could develop solutions to these and therefore enable the uptake of gigabit-capable broadband.

This research was informed by previous insight on the barriers consumers face in adopting gigabit-capable broadband, which was published in December 2020.[13] The past insight was developed from a review of existing consumer research, original primary research and submissions from broadband providers, infrastructure providers and consumer groups via a call for evidence and discussions with stakeholders including roundtables and GigaTAG meetings.

Due to COVID-19 we wanted to check whether the barriers to adoption that we had originally identified were still relevant. The original research had been conducted in the first few months of the pandemic and it was possible that, after a year in which consumers' reliance on online services had massively increased, consumers had changed their perception of the offer of a faster and more reliable broadband connection.

We hypothesised that:

- the majority of consumers are not likely to indicate that they would switch to gigabit-capable broadband, if it were available to them.
- that consumers are put off adopting gigabit-capable broadband as they do not perceive the need for faster or more reliable broadband.
- that there are 'practical barriers' to consumers adopting gigabit capable broadband, such as perception of researching and switching being a hassle and fear of loss of service during the switch.

1.3. Methodology

Yonder on behalf of Which? surveyed 2,114 UK adults. The survey was conducted online between 12 and 14 March 2021. Data was weighted to be representative of the UK population by age, gender, region, social grade, tenure and work status.

Of the respondents 1,913 were solely or jointly responsible for decisions about their household broadband and completed the survey.

13 Which?, CBI and FSB (December 2020) Gigabit Take-Up Advisory Group: Interim Report

2. Results

Our key findings are:

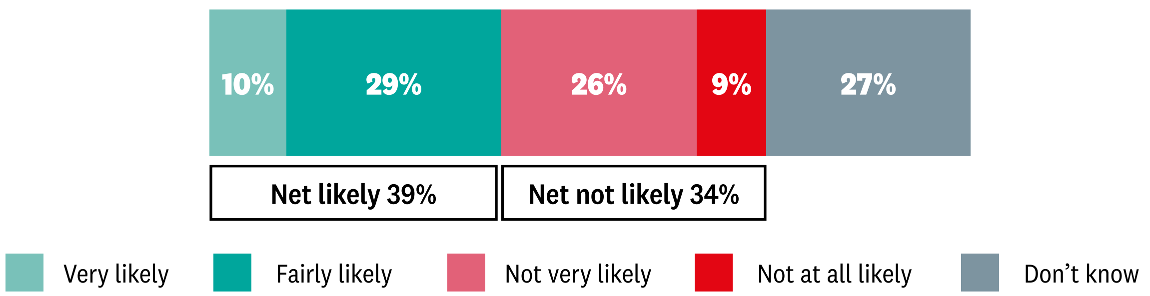
- **It is unlikely that in the near future there will be majority adoption of gigabit-capable broadband packages.** As with all new technology it will take time for the average consumer to be convinced of the relative advantage of it over alternatives and to believe that those advantages are worth any cost of adoption.
- **The biggest challenge facing industry and policy-makers is to convince people of the benefits of gigabit-capable broadband and that it is worth any increase in cost.** Currently people are put off adopting gigabit-capable broadband as they do not want to, or cannot afford to, pay more for their broadband and think that they don't need a faster or more reliable connection.
- **Consumers who have a disability may be more likely to face some practical and behavioural barriers to adoption.** These include speaking to providers about switching, perceived hassle of engaging in the market, not having the headspace to engage in the market and fear of loss of service and or ending up with a worse connection.
- **There are certain groups of consumers who are at risk of being particularly slow to adopt gigabit-capable connections.** These are older adults, those in small households, households whose broadband meets their needs and consumers in low income households.

We explore each of these findings in more detail below.

2.1. It is unlikely that in the near future there will be majority adoption of gigabit-capable broadband packages.

The majority of consumers don't indicate a preference to switch to a gigabit-capable broadband package- only 39% say that they are likely to.[14] A third (34%) say that they wouldn't be likely to switch and around a quarter (27%) said that they didn't know (see chart two).

Chart two: Percentage of consumers who say they would be likely, or not, to adopt a gigabit-capable broadband package.



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: all broadband decision-makers who don't already have gigabit broadband (1092)

14 If it were available to them and they were coming to the end of their package.

It is usual for mass adoption of a new technology to take time. One model of adoption explains that it will first be a minority of 'innovators' and 'early adopters' who will adopt new technology. Innovators are eager to try new ideas, usually have substantial financial resources and the ability to understand and apply complex technological knowledge; early adopters are opinion leaders who provide information and advice to other adopters.[15] Our research supports that consumers who indicate that they are early adopters of technology are significantly more likely to say they would be likely to switch to a gigabit-capable broadband package if it were available to them (66%), than those who place themselves as average in their adoption of new technology (42%) or slow to adopt new technology (23%).

As with all new technology it will take time for the average consumer to be convinced of the relative advantage of gigabit-capable broadband over alternatives and to believe that those advantages are worth any cost of adoption (both financial and non-financial).

2.2. The biggest challenge facing industry and policy-makers is to convince people of the benefits of gigabit-capable broadband and that it is worth any increase in cost.

9 in 10 (92%) decision-makers who don't already have gigabit broadband have at least one barrier to getting it. For consumers who perceive there to be barriers the most important issues are cost and perception of benefit.

Previous Which? research highlighted that consumer engagement in the broadband market is often motivated by the desire to keep costs down or to seek a better value deal.[16] Correspondingly, the cost of a gigabit-capable broadband package is one of the biggest barriers that consumers face to adopting it.[17] They are either not willing to pay more than they are paying now (36%) or cannot afford to (23%). Related to this they are concerned that they'll switch and pay more than they expected (19%).

Perceived benefit is the fundamental factor in motivating consumers to adopt a new technology. Currently, however, perceived need is the biggest barrier (alongside cost) to adoption. Consumers say they are put off adopting gigabit-capable broadband as they don't perceive the need for faster or more reliable broadband (21%).

Consumers' lack of perceived need is particularly striking considering the increased reliance that consumers have had on online services during the COVID-19 pandemic. We thought that consumers may be more likely to see the benefit of very fast and reliable broadband considering the increased demand that many households have put on their connection during this time. However, even for those who say they have increased their broadband use since the beginning of the pandemic, not needing faster or more reliable broadband was still the top barrier along with cost.[18]

Consumers therefore need to be persuaded that gigabit-capable broadband offers them a relative advantage to other broadband connections and that it's worth any adoption costs (financial or non-financial). Currently gigabit-capable broadband is lacking a 'killer application' and it is not clear to consumers what relative advantage it has over other connections. For example, only a

15 Rogers (1962) Diffusion of Innovations

16 Which? (2019) Consumer engagement with the broadband market

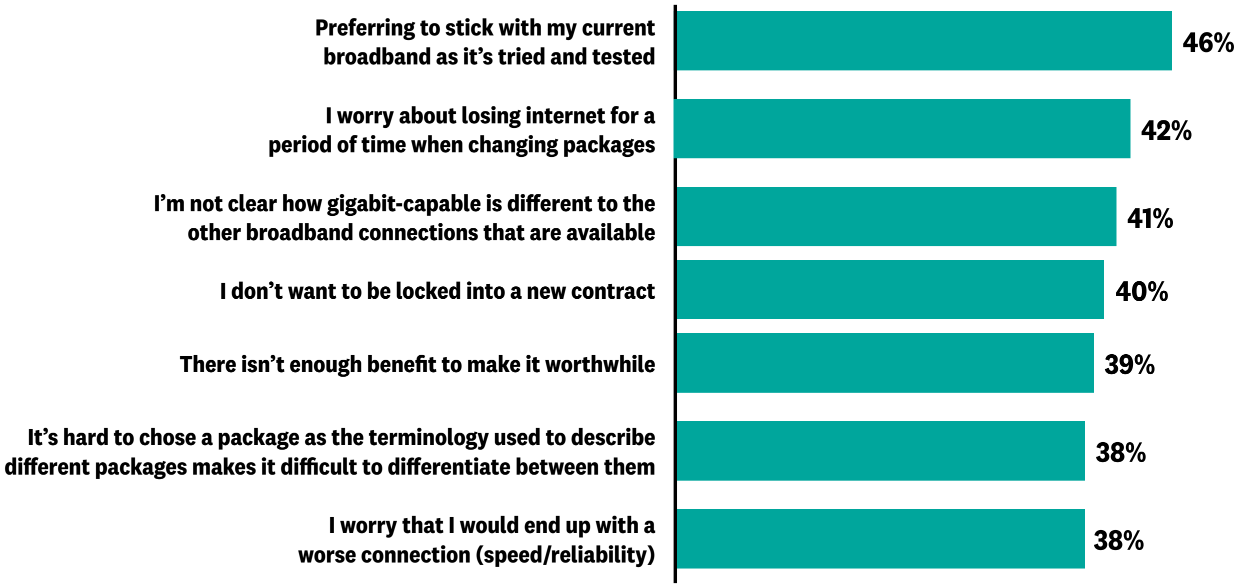
17 Survey participants were asked to identify their biggest barriers to adopting gigabit-capable broadband. They could select up to three factors.

18 My household doesn't need faster or more reliable broadband – 18%; I don't want to pay more for my broadband – 39%; I can't afford to pay more – 17%, I worry that I would end up paying more than I expected – 14%.

third (32%) of consumers who don't already have gigabit broadband are clear how it differs from the connection they have now. And when the benefits are explained to them they are often not persuaded that it is relevant to their household – only 4 in 10 (40%) consumers who don't already have gigabit broadband say that their household would benefit from it.

There are additional barriers beyond cost and perceived need, which are also likely to combine to undermine adoption levels. These are often barriers which face consumers engaging in the broadband market in general. The most frequently cited are shown in chart three and include consumers' preference for the status quo, risk aversion (related to fear of losing service when switching and or ending up with a worse connection) as well as difficulties related to choosing packages due to broadband terminology.

Chart three: the most frequently cited additional barriers to consumers adopting gigabit-capable broadband, beyond costs and need.



Q. Still imagining if your current broadband contract was coming to the end, and gigabit-capable broadband was available in your area. Below are reasons which might put someone off getting gigabit-capable broadband. For each one, please select whether it applies to you or not. Base: all broadband decision-makers who don't already have gigabit broadband (1902).

We have categorised the barriers facing consumers into broad themes:

- **Little perceived benefit**
- **Practical barriers to adoption**
- **Behavioural factors** – risk aversion and status quo bias

In table one we map the barriers, and the evidence for them, against this categorisation.

Table one: overview of the barriers facing consumers adopting gigabit-capable broadband packages.

Type of barrier	Barrier	Percentage of consumers citing the following as a barrier to them adopting gigabit-capable broadband.
Little perceived benefit	There is currently no 'pull' to adopt, either in the form of a 'killer' application or perceived importance of faster speeds	47% of consumers say that their household doesn't need faster or more reliable broadband.
	Customers are unclear how it differs to other connections on the market.	41% say it's not clear how gigabit-capable broadband is different to the other broadband connections that are available.
	Cost- low willingness to pay	50% say that they don't want to pay more for their broadband (even though they could afford to). 61% say they worry they would end up paying more than they expected (e.g. through unexpected costs or choosing a package that was more expensive than they initially thought)
Practical barriers to adoption	Restricted opportunities to switch (consumers would have to enter a new contract and not all providers will initially supply gigabit-capable connections)	40% don't want to be locked into a new contract. 31% don't want to move from their current provider.
	'Hassle' related to the switch	32% say it's too much hassle/ too time consuming to find the best gigabit package for my household. 28% say it would be too much hassle changing my package to gigabit, even if I found a good package. 42% say they worry about losing internet access for a period of time when changing packages. 38% said it's difficult to differentiate between packages due to terminology.
	Cost- affordability	28% say they can't afford to pay more for their broadband. This increases to 44% of consumers in a low-income household (household income less than £21K.)
	Capability to engage	29% say they don't have the headspace to look into deals and switch. 18% say that they find it difficult to talk to their provider about switching from them or taking out a new packages with them.
Behavioural factors	Risk aversion	38% say that they would worry they would end up with a worse connection (speed/reliability)
	Status quo bias	46% would prefer to stick with their current broadband as it's 'tried and tested'.

2.3. Consumers who have a disability may be more likely to face some practical and behavioural barriers to adoption.

There was no difference regarding the stated likelihood of adopting gigabit-capable broadband according to whether the decision-maker had a disability or not. By disability we meana person experiencing any physical impairment, cognitive impairment, social or behavioural condition (for example autism, attention deficit disorder, Asperger's), or mental health problem, which impacts or limits their daily activities or the work they can do.

People with a disability are no more likely than people without a disability to cite not needing faster or more reliable broadband as a barrier. However there are indications that some practical and behavioural factors may be more likely to be perceived by those with disabilities. These are:

- Finding it difficult to talk to providers about switching.
- It being too much hassle/time consuming to find a package and to switch.
- It being hard to choose a package as the terminology used to describe different packages makes it difficult to differentiate between them.
- Not having the headspace to look into deals and switch.
- Concern over loss of service and or ending up with a worse connection.

The above tend to be common across people with different disabilities.

We have analysed barriers by each type of disability this analysis can be found in the appendix. More research is needed to fully explore how barriers may differ for people with different disabilities as our sample sizes are small for some groups[19] and not representative.

2.4. Consumers who are at risk of being particularly slow to adopt gigabit-capable connections are older adults, those in small households, households whose broadband meets their needs and consumers in low income households.

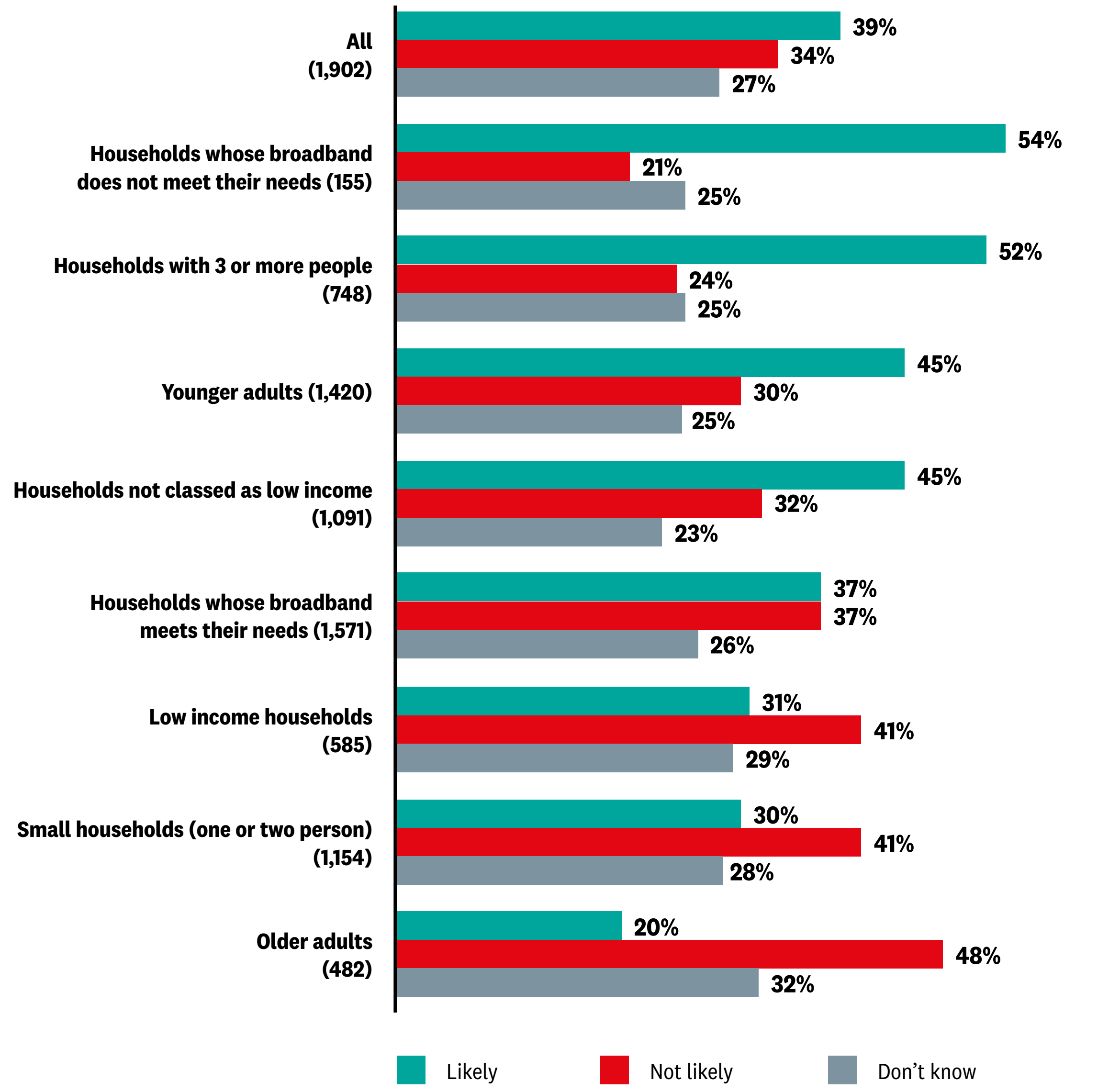
Just as there are early adopters of new technology there are also consumers who will be later than average to adopt gigabit-capable broadband. Our research indicates that the groups who may be slower to adopt than their counterparts are:

- older adults (65+ years)
- consumers in small households (one or two person households)
- households whose broadband meets their needs
- consumers in low income households

Chart four shows how these groups compare to each other and their counterparts.

19 Within the sample of decision-makers (who don't have gigabit-capable broadband) 381 indicated that they had a physical impairment (54% of whom were 55+ years); 46 said that they had a social and or behavioural condition; 55 said they had a cognitive impairment and 236 said they had mental health problems.

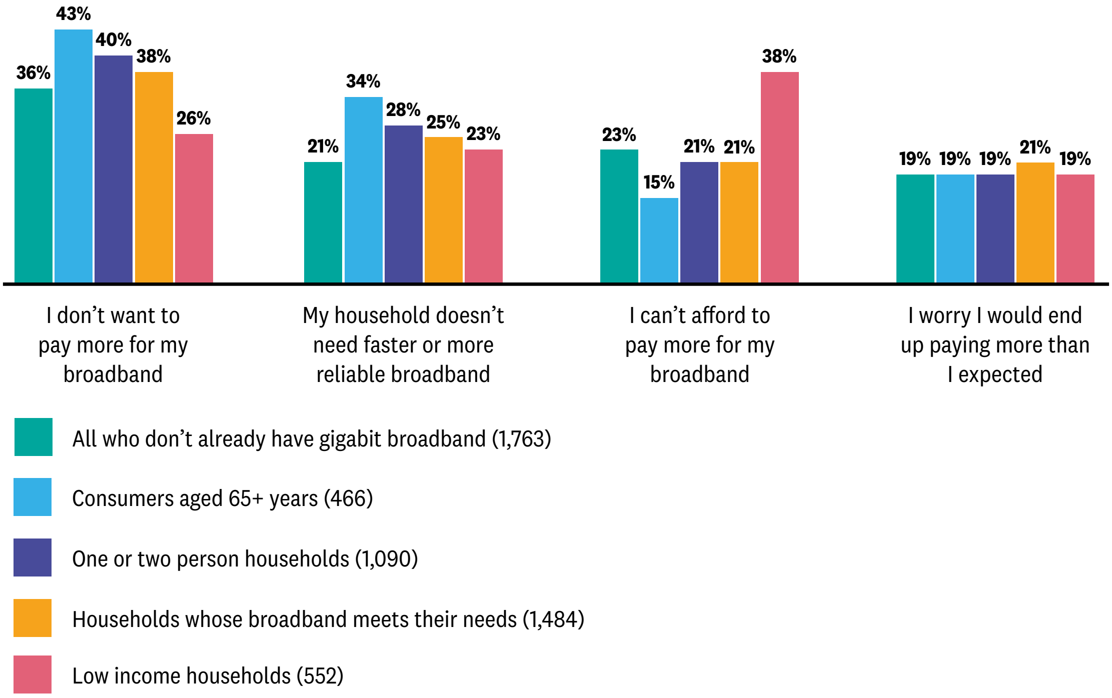
Chart four: Percentage of consumers who say they are likely, or not, to adopt gigabit-capable broadband.



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: all broadband decision-makers who don’t already have gigabit broadband. Base sizes in chart.

Cost and perceived need are still the top barriers for these groups, as can be seen in chart five. However, the presence of some subsidiary barriers are more likely to be cited by certain groups, compared to their counterparts.

Chart five: Top barriers to consumers adopting gigabit-capable broadband, by specific consumer groups.



Q. Which of the following reasons are the biggest barriers to you getting gigabit-capable broadband? Please select up to three answer. Base: all those who don't already have gigabit broadband and have at least one barrier to adopting it. Base sizes in chart.

Older adults (65+ years): are less likely to indicate they would adopt gigabit-capable broadband if it were available to them, compared to those who are younger. Half (48%) of older adults say they are not likely (compared to 30% of those younger than 65 years). The remaining percentage are more likely to say don't know than that they are likely (32% v 20%).

In addition to cost and lack of perceived need as barriers, older adults additionally indicate a preference for the status quo, reflected in wanting to stick with their current broadband as it's 'tried and tested' (22%). Older adults in our sample are more likely to cite all the factors asked about as barriers to adoption when considering what would put them off adopting gigabit-capable broadband.

One or two person households: As household size decreases, from those who have 3 or more people, to those who are in a two person household and down to one person households, stated likelihood to adopt gigabit-capable broadband decreases. Half (52%) of those in a household with three or more people say that they are likely to switch to gigabit-capable broadband. This decreases to a third (33%) in two person households and a quarter (26%) in one person households.

This group is skewed towards older adults.[20] Reflecting this when considering all barriers to adoption, other than not having the headspace and worry about a worse connection, all of the barriers which are more likely to face older adults are also more likely to face consumers in small households.

Consumers who indicate their broadband is meeting their needs: The majority (82%) of decision-makers say that their broadband has met their needs over the last year. This group is evenly divided as to whether they state they're likely or not to adopt gigabit-capable broadband (37% for each). In contrast half (54%) of those who say that their broadband has not met their household needs say they would be likely to adopt gigabit if it was available to them.

20 56% of consumers in one or two person households are aged 55+ years, compared to 39% of consumers aged 55+ years in the general population.

Reflecting that their broadband meets their needs, they are more likely to say in their top barriers that not needing faster or more reliable broadband is a barrier to adopting gigabit-capable broadband, compared to those consumers whose broadband hasn't met their needs (25% v 4%) and that they don't want to pay more their broadband (38% v 21%).

When considering all barriers they are more likely to indicate a preference for the status quo, saying that not wanting to move from their provider is a barrier (35% v 14%) and that they prefer to stick with their current broadband as it's 'tried and tested' (51% v 24%). Considering their satisfaction with their current situation it's not surprising that they are more likely to see it as 'hassle' to find the best gigabit-capable package for their household (35% v 23%) and to switch (30% v 20%).

Consumers in low income households (household income less than £21k): Lack of perceived need is among the top barriers to adoption for consumers in low income households. However, they are no more likely to cite this than those who are not in low income households (23% v 21%).

Instead, affordability is the biggest distinguishing factor between consumers in low income households and those not. People in low income households are twice as likely to say that affordability would be a barrier, than those who are not in a low income household (38% v 16%). This does not mean that if they were able to afford it, they would be willing to pay – there is still a high proportion (26%) in this group who say that a barrier is that they simply don't want to pay more for their broadband, even though they could afford to.[21] However it does mean that even if those who can't afford it were convinced of the benefits it's unlikely that, without financial help, they would be able to adopt it.

When considering all barriers they are more likely to say that they worry they would end up paying more than expected, compared to those not in low income households (65% v 58%). This relates to concerns about affordability and supports qualitative research by Futuresight in 2014 which found that some low income consumers expressed a reluctance to shop around partly as they feared 'missing something' and paying more when entering into a new contract.[22] This fear of accidentally paying more may also partly explain their increased likelihood to be put off adopting gigabit-capable broadband if they have to enter a new contract (44% v 37%). This fits with previous research by Citizens Advice (2017) which shows that consumers in low income households are more likely to stick to the same broadband contract, compared to those in higher income households.[23]

They are also more likely to say they don't have the headspace to look into deals and switch (36% v 26%). Previous qualitative research with a mix of vulnerable consumers has found that for people who face challenges in life that it is unlikely that they would be able to find the motivation and or the time to engage with the broadband market sufficiently to assess their options and make a choice.[24]

In table three we indicate the barriers that are more likely to be cited by those groups who have indicated that they are less likely to adopt gigabit-capable broadband. These are not necessarily their top barriers, but indicate where there may need to be extra attention spent in mitigating these specific barriers for these groups.

21 Participants in the survey were not allowed to answer both that they could not afford to pay more and that they were not willing to pay more. They had to choose the one that was most reflective of their position.
22 Futuresight (2014) Affordability of Essential Telecoms Services.
23 Consumers in households earning between £7,001 and £21,000 are almost 3 times as likely as those earning more than £55,000 to be in their contracts for 10 years or more. Citizens Advice (2017) Exploring the loyalty penalty in the broadband market.
24 Jigsaw (2019) Consumer engagement in fixed broadband.

Table two: barriers which are more likely to be cited by specific groups than their counterparts (this table reports any barrier to consumers not just their top ones)

		Consumer group			
Type of barrier	**Barrier**	Older adults (65+years)	Small households (one or two person)	Households who feel their broadband meets their needs	Households with low income (less than £21k)
Little perceived benefit	Don't need faster or more reliable broadband	✓	✓	✓	✓
	Not clear how gigabit-capable connections differ to alternatives	✓	✓		
	Don't want to pay more	✓	✓	✓	
	Worry about paying more than expected	✓	✓		✓
Practical barriers	Don't want to be locked into a new contract	✓	✓		✓
	Don't want to move from provider	✓	✓	✓	
	Hassle related to switch (identifying package and or switching)	✓	✓	✓	
	Worry about losing internet access				
	Difficult to differentiate between packages due to terminology	✓	✓		✓
	Affordability				✓
	Don't have the headspace	✓			✓
	Difficulty talking to provider				
Behavioural factors	Worry end up with a worse connection	✓			
	Prefer to stick with current broadband as it's 'tried and tested'.	✓	✓	✓	

3. Conclusion

Gigabit-capable broadband offers consumers the opportunity to achieve a faster and more reliable connection and future-proof their broadband. However consumer demand is currently low. This is not unexpected and should not be unduly concerning. It takes time for consumers to adopt new technology and we can see that the 'early adopters' – those who tend to be the first to try a new technology product – are more likely to say that they would switch to gigabit-capable broadband if it were available. This suggests that we are likely to see the usual pattern of adoption across consumers.

The question is how long it takes for the average consumer to switch to gigabit-capable broadband and what can be done to mitigate the risk that some consumer groups (for example older adults and people in low income households) may be left behind.

For consumers to be motivated to adopt a gigabit-capable connection they need to be convinced of the relative benefit of gigabit-capable connections, including that it is worth any additional cost. Cost, either in the form of willingness to pay or ability to pay, and perception of need are currently the main barriers to consumers adopting a gigabit-capable connection.

There are also many subsidiary barriers which need to be addressed, which reflect difficulties that consumers face in engaging in the broadband market in general. For example, factors which relate to perceptions of the practicalities of switching (such as perceived hassle) and behavioural factors (such as a preference to stick with their 'tied and tested' connection and risk aversion in the form of fearing a worse connection or loss of service when switching). All of these will combine to undermine people's motivation and capability to switch.

The GigaTAG, comprising of Which?, the Confederation of British Industry (CBI) and the Federation of Small Businesses (FSB) has developed and set out recommendations in their final report for how barriers facing consumers can be mitigated.[25]

25 Which?, CBI and FSB (June 2021) Gigabit Take-up: Final Report.

4. Appendix

Yonder on behalf of Which? surveyed 2,114 UK adults. The survey was conducted online between 12 and 14 March 2021. Data was weighted to be representative of the UK population by age, gender, region, social grade, tenure and work status. Of the respondents 1,913 were solely or jointly responsible for decisions about their household broadband and completed the survey.

Q. Thinking about the broadband market. How confident are you doing each of these?

Base: Those who are responsible for making decisions about broadband (1913)

	Net: Confident	Net: Not confident	DK
Understanding the language and terminology used by broadband providers	58%	37%	5%
Understanding what the difference would be in broadband quality between 'full-fibre broadband' and 'fibre to the cabinet' broadband.	50%	43%	7%
Calculating whether you would make any saving by changing your broadband package or provider	76%	18%	5%
Speaking to your current broadband provider about switching package with them	77%	18%	5%
Speaking to your current broadband provider about switching from them to another provider	74%	21%	6%

	Older adults (65+ years) (483)	People with a physical disability (383)	People with a cognitive impairment (n=55) Unweighted numbers below due to small sample size	People with social and or behavioural conditions (46) Unweighted numbers below due to small sample size	People with mental health problems (237)	Net no impairment (1277)
Not confident speaking to your current broadband provider about switching *from them* to another provider	26% (versus 19% of those younger than 65 years)	26%	17 out of 55	22 out of 46	30%	18%
Not confident speaking to your current broadband provider about switching package with them	22% (versus 16% of those younger than 65 years)	21%	13 out of 55	17 out of 46	23%	16%

Specific groups have not been weighted to be representative of that sample in the general population. Significance testing cannot be conducted between different disability groups due to their not being mutually exclusive categories (i.e. the same individual may have a number of disabilities). For small samples (n<100) unweighted numbers are given rather than weighted percentages.

Q. The next few questions are about 'gigabit-capable broadband'.

The Government's ambition is for most of the UK to have access to a new type of broadband technology, called gigabit-capable broadband by 2025. This broadband technology will:

- **allow for faster speeds** up to 1Gbps (1000Mbps), which allow users to download a high-definition film in under a minute
- be **less likely to slow down** when lots of people (and devices) are using the connection at the same time for high bandwidth activities eg video streaming.
- **provide a more reliable and consistent service:** you do not experience connection drop-outs or speeds which are much slower than you expect
- **futureproof the UK's network:** gigabit-capable broadband is able to provide the- connections needed to fulfil the increasing demand for digital services, such as online video streaming and video calls

Before today, were you aware of either of the following?

Base: Those who are responsible for making decisions about broadband (n=1913)

	Yes – fully aware	Yes – aware of but not in detail	No – not aware	DK	Net – aware
That the government's ambition is for the majority of the UK to have access to gigabit-capable broadband by 2025	7%	26%	62%	5%	33%
The term 'gigabit-capable broadband'	11%	26%	59%	4%	37%

Q. As a reminder, gigabit-capable broadband offers:

- **speeds which are significantly faster** than those provided by current broadband technology and which mean more people in the household can use it at once without affecting the quality/speed of the connection
- **a more reliable & consistent connection** i.e. you are much less likely to experience buffering and/or service drop outs
- **futureproofing the UK's network:** gigabit-capable broadband is able to provide the connections needed to fulfil the increasing demand for digital services, such as online video streaming and video calls

In most circumstances an engineer will have to visit your home to install gigabit-capable broadband.

With the above in mind, to what extent do you agree or disagree with the following?

Base: All who say they don't have gigabit already (n=1902)

	Net agree	Neither agree nor disagree	Net disagree	DK
My household would benefit from having gigabit-capable broadband	40%	26%	22%	12%
I would be willing to pay more than I do now to have gigabit capable broadband	21%	24%	49%	7%
I don't understand the benefits of upgrading to gigabit capable broadband	33%	24%	39%	5%
I'm not clear how gigabit-capable broadband differs to the broadband connection I have now	41%	21%	32%	5%
It would be a hassle to switch to gigabit-capable broadband	27%	28%	26%	19%
My household doesn't need faster broadband	44%	23%	29%	3%
My current broadband already gives me speeds close to what gigabit delivers	17%	19%	40%	23%
I would like to know more about gigabit-capable broadband	52%	28%	16%	4%

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: All who say they don't have gigabit already (n=1902)

Very likely	10%
Fairly likely	29%
Not very likely	26%
Not at all likely	9%
Don't know	34%
Net likely	39%
Net not likely	34%

	Older adults (65+ years) (482)	Younger adults (under 65 years) (1420)	Consumers in one or two person households (1154)	Consumers in three person households or more (748)	Households whose broadband meets their needs (1571)	Households whose broadband doesn't meet their needs (155)	Consumers in low income households (less than 21K income) (585)	Consumers not in low income households (£21k + income) (1091)
Net likely	20%	45%	30%	52%	37%	54%	31%	45%
Net not likely	48%	30%	41%	24%	37%	21%	41%	32%
Don't know	32%	25%	28%	25%	26%	25%	29%	23%

Q. Still imagining if your current broadband contract was coming to the end, and gigabit-capable broadband was available in your area. Below are reasons which might put someone off getting gigabit-capable broadband. For each one, please select whether it applies to you or not.

Base: All those who do not already have gigabit broadband

Type of barrier	Specific barrier	All who don't have gigabit (1902)	Older adults (65+ yrs) (482)	Younger adults (under 65 years) (1420)	One or two person households (1154)	Three+ person households (748)	Consumers in a low income household (less than £21k) (585)	Consumers not in a low income household (£21k+) (1091)	Broadband meets households needs (1571)	Broadband doesn't meet household needs (155)
No perceived benefit (or not enough)	My household doesn't need faster or more reliable broadband	47%	67%	41%	56%	33%	50%	45%	54%	18%
	There isn't a big enough benefit to make it worthwhile	39%	52%	35%	45%	30%	38%	40%	43%	26%
Unclear how it differs to other connections	I'm not clear how gigabit-capable broadband is different to the other broadband connections that are available	41%	56%	35%	45%	35%	43%	39%	42%	41%
Low WTP	I don't want to pay more for my broadband (though I could afford to)	50%	65%	46%	56%	42%	38%	56%	55%	48%

Type of barrier	Specific barrier	All who don't have gigabit (1902)	Older adults (65+ yrs) (482)	Younger adults (under 65 years) (1420)	One or two person households (1154)	Three+ person households (748)	Consumers in a low income household (less than £21k) (585)	Consumers not in a low income household (£21k+) (1091)	Broadband meets households needs (1571)	Broadband doesn't meet household needs (155)
Restricted opportunities to switch	I don't want to be locked into a new contract	40%	51%	36%	43%	34%	44%	37%	41%	42%
	I wouldn't want to 'unbundle' the services I have with my provider (e.g. broadband from TV)	32%	49%	27%	34%	29%	31%	33%	34%	26%
	I wouldn't want to move from my current provider	31%	49%	25%	35%	26%	34%	29%	35%	14%
'Hassle' related to the switch	It's too much hassle/ too time consuming to find the best gigabit package for my household	32%	47%	27%	35%	27%	34%	31%	35%	23%
	It's hard to choose a package as the terminology used to describe different packages makes it difficult to differentiate between them	38%	57%	32%	42%	33%	42%	36%	40%	38%
	It would be too much hassle changing my package to gigabit, even if I found a good package	28%	38%	25%	30%	26%	28%	29%	30%	20%
	I wouldn't want an engineer to visit (even of there was no risk of Covid)	18%	21%	17%	18%	18%	18%	17%	18%	22%
	I worry about losing internet access for a period of time when changing packages	42%	42%	42%	41%	44%	45%	42%	44%	38%

Type of barrier	Specific barrier	All who don't have gigabit (1902)	Older adults (65+ yrs) (482)	Younger adults (under 65 years) (1420)	One or two person households (1154)	Three+ person households (748)	Consumers in a low income household (less than £21k) (585)	Consumers not in a low income household (£21k+) (1091)	Broadband meets households needs (1571)	Broadband doesn't meet household needs (155)
Affordability	I can't afford to pay more for my broadband	28%	22%	31%	27%	30%	44%	22%	27%	43%
Ability to engage	I don't have the 'headspace' to look into gigabit deals and switch	29%	38%	26%	31%	27%	36%	26%	31%	23%
	I find it difficult to talk to my provider about switching from them or taking out a new packages with them	18%	19%	17%	17%	18%	20%	17%	18%	23%
Loss aversion	I worry I would end up paying more than I expected (e.g. through unexpected costs or choosing a package that was more expensive than I initially thought)	61%	72%	57%	63%	57%	65%	58%	62%	62%
	I worry that I would end up with a worse connection (speed/ reliability)	38%	45%	36%	38%	39%	38%	38%	37%	53%
Status quo bias	I would prefer to stick with my current broadband as it's 'tried and tested'	46%	66%	39%	49%	40%	47%	45%	51%	24%

Consumers who have a disability

The definition that we used for disability was whether a consumer had any physical impairment, cognitive impairment, social or behavioural conditions (for example autism, attention deficit disorder, Asperger's), or mental health problems which impact or limit their daily activities or the work they can do. Within the sample of decision-makers (who don't have gigabit-capable broadband) 381 indicated that they had a physical impairment (54% of whom were 55+ years); 46 said that they had a social and or behavioural condition; 55 said they had a cognitive impairment and 236 said they had mental health problems. We therefore note two constraints on our findings: 1) samples for some groups are small and 2) the sample will not be representative of these groups. We do however think that it's useful to report on any differences (or not) acknowledging the context of these limitations and suggest that further research should be conducted with specific groups.

Below are the barriers which are more likely to be cited by those with the specific challenge noted.

Decision-makers who have a cognitive impairment. (n=55)

Barriers which are potentially more likely, compared to those who don't report any disability:

- worry that they would end up with a worse connection (n=32 out of 55)
- worry about losing internet access for a period of time when changing packages (n=31 out of 55)
- it being too much hassle/ time consuming to find the best gigabit package for their household (n=22 out of 55) and to switch package even if they found a good package (n=23 out of 55)
- thinking it's hard to choose a package, as the terminology used to describe different packages makes it difficult to differentiate between them (n=31 out of 55)
- finding it difficult to talk to their provider about switching package/provider (n=25 out of 55)
- not having the headspace to look into gigabit deals and switch (n=26 out of 55)

Decision makers who have a physical disability (e.g. hearing, eyesight, mobility, dexterity, breathing) (n=381)

It should be noted that this group overlaps substantially with older age (38% of this group are aged 65+ years, compared to 23% of the general population being aged 65+ years).

Barriers which are potentially more likely, compared to those who don't report any disability:

- worry that they would pay more than they expected (66% v 59%)
- not being clear how gigabit is different to other connections (54% v 38%)
- preferring to stick with their current broadband as it's tried and tested (52% v 44%)
- worry that they would end up with a worse connection (50% v 36%)

- thinking it's hard to choose a package as the terminology used to describe different packages makes it difficult to differentiate between them (50% v 36%)
- worry about losing internet access for a period of time when changing packages (49% v 40%)
- thinking it's too much hassle/ time consuming to find the best gigabit package for their HH (40% v 31%) and to switch package even if they found one (34% v 27%)
- not wanting to be locked into a new contract (48% v 39%)
- not wanting to move from their provider (39% v 29%)
- not having the headspace to look into gigabit deals and switch (38% v 27%)
- finding it difficult to talk to their provider about switching package/provider (26% v 15%)

Decision makers who have a behavioural and or social condition (n= 46)

Barriers which are potentially more likely, compared to those who don't report any disability:

- thinking it's too much hassle/ time consuming to find the best gigabit package for their household (n=19 out of 46) and to switch package (n=18 out of 46)
- thinking it's hard to choose a package as the terminology used to describe different packages makes it difficult to differentiate between them (n=25 out of 46)
- not wanting an engineer to visit (n=16 out of 46)
- finding it difficult to talk to their provider about switching package/provider (n= 27 out of 46)
- not having the headspace to look into gigabit deals and switch (n=21 out of 46)

Decision makers who have mental health problems (n=236)

Barriers which are potentially more likely, compared to those who don't report any disability:

- worry that they would end up with a worse connection (46% v 36%)
- worry about losing internet access for a period of time when changing packages (54% v 40%)
- finding it difficult to talk to their provider about switching package/provider (26% v 15%)
- not having the headspace to look into gigabit deals and switch (38% v 27%)

Q. Which of the following reasons are the biggest barriers to you getting gigabit-capable broadband? Please select up to three answer.

Base: all consumers who don't already have gigabit and have at least one barrier to getting it

Type of barrier	Specific barrier	All who don't have gigabit and say there are barriers) (1763)	Older adults (65+yrs) (466)	Younger adults (under 65 years) (1297)	One or two person households (1090)	Three+ person households (673)	Consumers in low income households (552)	Consumers not in a low income household (£21k+) (1097)	Broadband meets households needs (1484)	Broadband doesn't meet households needs (146)
No perceived benefit (or not enough)	My household doesn't need faster or more reliable broadband	21%	34%	17%	28%	12%	23%	21%	25%	4%
	There isn't a big enough benefit to make it worthwhile	12%	14%	12%	14%	9%	11%	13%	13%	7%
Unclear how it differs to other connections	I'm not clear how gigabit-capable broadband is different to the other broadband connections that are available	9%	13%	8%	9%	10%	8%	9%	9%	15%
Low WTP	I don't want to pay more for my broadband (though I could afford to)	36%	43%	33%	40%	29%	26%	40%	38%	21%
Restricted opportunities to switch	I don't want to be locked into a new contract	8%	7%	8%	8%	6%	9%	6%	8%	8%
	I wouldn't want to 'unbundle' the services I have with my provider (e.g. broadband from TV)	9%	13%	8%	10%	9%	10%	9%	9%	10%
	I wouldn't want to move from my current provider	8%	13%	6%	9%	5%	9%	7%	9%	0%

Type of barrier	Specific barrier	All who don't have gigabit and say there are barriers) (1763)	Older adults (65+yrs) (466)	Younger adults (under 65 years) (1297)	One or two person households (1090)	Three+ person households (673)	Consumers in low income households (552)	Consumers not in a low income household (£21k+) (1097)	Broadband meets households needs (1484)	Broadband doesn't meet households needs (146)
'Hassle' related to the switch	It's too much hassle/ too time consuming to find the best gigabit package for my household	3%	4%	3%	3%	4%	3%	3%	3%	3%
	It's hard to choose a package as the terminology used to describe different packages makes it difficult to differentiate between them	6%	8%	5%	6%	5%	6%	6%	6%	7%
	It would be too much hassle changing my package to gigabit, even if I found a good package	4%	5%	3%	4%	4%	2%	5%	4%	2%
	I wouldn't want an engineer to visit (even of there was no risk of Covid)	4%	3%	4%	4%	4%	4%	4%	4%	6%
	I worry about losing internet access for a period of time when changing packages	11%	7%	12%	11%	11%	11%	12%	11%	12%
Affordability	I can't afford to pay more for my broadband	23%	15%	25%	21%	25%	38%	16%	21%	34%
Ability to engage	I don't have the 'headspace' to look into gigabit deals and switch	6%	6%	6%	6%	7%	6%	7%	6%	4%
	I find it difficult to talk to my provider about switching from them or taking out a new packages with them	2%	2%	2%	2%	3%	3%	2%	2%	6%

Type of barrier	Specific barrier	All who don't have gigabit and say there are barriers) (1763)	Older adults (65+yrs) (466)	Younger adults (under 65 years) (1297)	One or two person households (1090)	Three+ person households (673)	Consumers in low income households (552)	Consumers not in a low income household (£21k+) (1097)	Broadband meets households needs (1484)	Broadband doesn't meet households needs (146)
Loss aversion	I worry I would end up paying more than I expected (e.g. through unexpected costs or choosing a package that was more expensive than I initially thought)	19%	19%	18%	19%	18%	19%	17%	16%	26%
	I worry that I would end up with a worse connection (speed/reliability)	10%	10%	11%	9%	13%	10%	10%	9%	19%
Status quo bias	I would prefer to stick with my current broadband as it's 'tried and tested'	13%	22%	10%	14%	11%	15%	12%	14%	7%

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