THE BIG BROADBAND SURVEY

2012

Research by thinkbroadband.com

21 March 2013

INTRODUCTION

This report published in March 2013 is based on an analysis of over 10,000 responses to The Big Broadband Survey carried out by thinkbroadband between 22/06/2012 and 20/10/2012 on the broadbandsurvey.org.uk website.

Overall 13,741 surveys were submitted, including 2,693 partial responses which have been excluded from the analysis and 152 responses which were disqualified as the respondents were not based in the UK. This resulted in a sample of 10,896 from which this analysis has been carried out. Some questions were only applicable to a sub-set of these users, so the sample sizes vary and are indicated in relevant sections.

The initial survey was designed to include responses from UK individuals who did not have a broadband connection (either because they did not feel they required one or because they couldn't receive one) however as only a very small number of respondents who filled in the survey were from this category, we have not analysed this section of the survey as it would not provide sufficient data to be meaningful.

As the survey has been carried out online and promoted by thinkbroadband, there will be a slight bias towards more IT-literate users as confirmed by 41% of respondents classifying themselves as 'confident' with IT and 49% as 'power users' or higher. The statistics overall may also therefore indicate future trends as these users are more likely to be early adopters of technology. It is worth noting that 69% of respondents did not work in an IT function nor in the IT industry.

The survey sections included:

- ✓ General questions (location, business use & when first used broadband)
- ✓ Broadband Provider (package, pricing, importance of features, technology, hardware, etc.)
- ✓ Migration between providers (process, ease of migration, etc.)
- ✓ Broadband usage (applications, no of devices, social media, time/amount of use, wireless security)
- ✓ Super-fast and ultra-fast broadband (availability, willingness to pay more, expectations)
- ✓ Demographics (age, children in household, budgeting for broadband)
- ✓ Parental responsibility (parental controls and protecting children)

We will be repeating the survey in 2013 and would welcome suggestions from anyone with ideas on questions that we should ask. It is our intention to re-run key questions from the 2012 survey to plot trends across time however we are also looking at new areas.

Any suggestions may be sent to team@thinkbroadband.com.

ABOUT THINKBROADBAND

thinkbroadband.com is a free consumer broadband advice website helping hundreds of thousands of users each month to address all kinds of problems and decisions with their broadband connection. It started operating in April 2000 under the name ADSLguide.org.uk and has been one of the established broadband information resources since then.

The site provides news and commentary on broadband issues, one of the most comprehensive lists of broadband services, advice and guides on all aspects of broadband, a community forum to discuss issues with other users, and a number of free tools to monitor the speed and quality of their broadband connection.

thinkbroadband
http://www.thinkbroadband.com

UK Broadband Speed Test
http://www.thinkbroadband.com/speedtest.html

Broadband Quality Monitor
http://www.thinkbroadband.com/ping

Broadband Guides
http://www.thinkbroadband.com/guides.html

Broadband Maps
http://maps.thinkbroadband.com

MEDIA ENQUIRIES

If you are a member of the media and would like to talk to us about this survey, please contact our PR agency Berkeley PR who can assist you:

Contacts:	Ramandeep Sahota Evie Porter
Telephone:	0118 909 0909
E-mail:	thinkbroadband@berkeleypr.co.uk
Website:	www.berkeleypr.co.uk

ATTRIBUTION

We encourage reporting, discussion and commentary on these survey results. We would ask that attribution of results includes a link to the survey results:

http://www.thinkbroadband.com/broadband-survey.html

References to the survey may be attributed as either/or:

Source: The Big Broadband Survey 2012 (thinkbroadband.com)

Source: thinkbroadband.com

ABSTRACT

RESPONDENT PROFILE

The vast majority of the respondents (87%) have had a broadband connection for over 4 years; 71% for longer than 6 years (since 2006/7 or earlier).

A slight bias exists in survey responses towards niche operators (8% of respondents using O2/BE versus 3% of market; and 8% respondents using smaller providers versus 5% of the market as at Q3/2012.

BUSINESS USE

46% of respondents use their broadband for work use; 51% use it for personal use only. The survey shows evidence that there is a marginal willingness to pay more by users using their broadband for work use.

There is a significant difference between business use between UK regions with London having the highest rate of work use (59%) followed by the South East (53%); the North East (36%) and Northern Ireland (32%) had the lowest levels.

Orange, TalkTalk and AOL users were least likely to use their broadband for work.

BUNDLING & PRICING

The vast majority (71%) of users buy broadband with at least one other service, the most common being 'broadband + home phone' (47%). Sky & Virgin Media lead the triple/quad play market. BT and TalkTalk focus on 'broadband + home phone' bundles.

Users buying multiple services from the same provider spend considerably more, especially triple/quad play users. 37% of triple/quad-play users spend in excess of £60/month with their provider.

There is no significant difference in the price paid for broadband across regions of the UK, or based on how long users have been with their current broadband provider.

Users aged 65+ are twice as likely (56%) to stay with their broadband provider for more than four years as compared to users aged 18-24 (28%).

BROADBAND PROVIDERS

Quality and reliability of a broadband connection (36%) was cited by respondents as the most important factor when selecting a broadband service with download speeds (21%) and price (15%) also being quoted.

Additional services such as e-mail and web hosting were viewed as unimportant by users with increasing use of separate hosting companies and web-based e-mail providers.

Virgin Media users were far more likely to be very satisfied (rated 5 of 5) with broadband speeds than most other larger providers (BT 19%; Sky 16%, TalkTalk 11%).

There are regional variations with broadband speed satisfaction—35% of users in Wales were dissatisfied (rated 1-2 of 5) with broadband speed; compared to 21% in London.

Users of Zen Internet, Eclipse, AAISP and IDNet rated the reliability highly (5 of 5) whilst Orange and AOL users were more likely to rate them low. Niche providers AAISP, Zen Internet, IDNet and Eclipse score highly on customer service. AOL, TalkTalk and Orange users are least satisfied.

SWITCHING PROVIDERS

56% of users review their choice of broadband package at least once a year. 28% rarely review it. Those who review their choices less frequently are **not** paying significantly more than those who review it more often.

Around a third of O2/BE users are considering switching provider; this is likely to be O2/BE's lack of a fibre broadband solution.

Of those who have migrated broadband providers, BT was the biggest winner taking roughly a third of migrations from each of O2, BE, Orange, Sky and TalkTalk. O2, BE and Orange are not benefitting significantly from new migrations.

Download speed is the most important factor for those considering switching (33% rate it as primary reason; 64% consider it a factor); Price and service quality are also important (47% and 43% respectively consider these a factor in their decision with 18% each believing it to be the most important reason to switch).

Three quarters of BE and O2 users planning to switch cited download speeds or the lack of fibre broadband as their reason. 59% of Sky Broadband and 52% of Orange users cited the same speed issues, as contrasting only 12% of Virgin Media users of which 42% left due to quality and reliability issues.

A quarter of PlusNet users planning to switch are doing so due to download allowances/fair usage policies; a reason not often cited by users of other broadband providers. Since this survey, PlusNet have removed fair usage policies from unlimited packages in December 2012.

6 in 10 users switched using the MAC process and overall 89% of users found the switching process easy. However, half of the users who couldn't use a MAC to switch found the process difficult. This further confirms the need for Ofcom to drive a new process for broadband migrations to better support the increasing use of fully bundled lines.

Over a third of users still use an ISP-provided e-mail address, and of those, 61% would consider it a factor or deterrent in switching providers.

Most users not on super-fast broadband services would pay little or nothing more for faster broadband at this time; however 64% of users were willing to switch providers to get super-fast broadband.

BROADBAND USE

65% of users connect their mobile phone to their home broadband connection; Over a third have a games console and a quarter have an Internet-enabled TV/device that allows them to connect their television on the Internet to consume on-demand content.

21% of users may have a potentially insecure wireless network which does not use WPA/WPA2 encryption. Use of this feature which is strongly recommended for all wireless connections ranges from 71% for those not working in an IT function or in the IT industry to 91% of those working in IT indicating consumer awareness remains an issue—Increasingly broadband routers are now pre-configured to use WPA/WPA2 encryption however a number of old broadband routers are still in use, allowing neighbours or anyone nearby to use a broadband connection without permission. We expect this figure will fall in future years.

Over half 18-24 year olds (56%) spend in excess of 6 hours online each day. The most popular time to go online is between 6pm and midnight

IMPORTANCE OF INTERNET TO USERS

86% of respondents believe the Internet is an important part of their social life, of which more than half believed it to be very important. Younger users are more likely to consider the Internet very important, however only a minority of users consider it insignificant across age groups, although it is worth noting that this is somewhat biased by the survey being conducted online.

If being asked to give up one service, 49% would give up satellite/cable/digital TV, 30% mobile phone and only 2% would give up their broadband connection.

PARENTAL CONTROLS

The vast majority of parents believed talking to their children was a key aspect of keeping their children safe online with over 80% of parents with children aged 10 to 15 using this as one of their tools. Younger children are more likely to be supervised by locating the computer in a shared area and all use being supervised by an adult or older sibling. Parental control software provided by the operating system or purchased separately is used some of the time, more so for younger children.

OTHER FINDINGS

Two thirds of users use the broadband router supplied to them by their broadband provider; Around one third sourced their own hardware. 79% found the setup process easy.

95% of broadband faults reported to by respondents were fixed at no cost to the consumer. A significant number of broadband faults are taking days to fix.

14% of users struggle to pay for their broadband connection from household budgets (compared to 21% in an Australian survey in 2011); Respondents working in IT found budgeting significantly easier with only 8% struggling to find the money.

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DEMOGRAPHICS

How old are you?	%	n
18 - 24	3%	362
25 - 34	10%	1,129
35 - 49	26%	2,844
50 - 64	33%	3,584
Over 65	27%	2,898
Prefer not to say	1%	79
Total	**100%**	**10,896**

Do you work in the IT industry or is your job related to performing IT functions in a company? (or have you been in such a role within the last two years?)	%	n
No - I don't work in IT	69%	7,516
Yes - I work in IT	31%	3,325
Total	**100%**	**10,841**

How many adults (aged 18 or over) live in the household?	%	n
1	17%	1,899
2	64%	6,921
3	13%	1,439
4	5%	497
5 or more	1%	140
Total	**100%**	**10,896**

Do you have children living in the household?	%	n
Aged 0 - 9	12%	1,334
Aged 10 - 12	6%	655
Aged 13 - 15	6%	702
Aged 16 - 17	5%	568
No children (under 18)	78%	8,475
Total	**100%**	**10,896**

WHEN DID YOU FIRST HAVE ACCESS TO A BROADBAND CONNECTION AT HOME?

MOST RESPONDENTS ARE SEASONED BROADBAND USERS

87% OF RESPONDENTS HAVE HAD BROADBAND FOR OVER 4 YEARS

71% OF RESPONDENTS HAVE HAD BROADBAND FOR OVER 6 YEARS

	n	%
Not Answered	167	2%
Less than a year ago (2011 - 2012)	151	1%
1 to 2 years ago (2010)	192	2%
2 to 4 years ago (2008 - 2009)	680	6%
4 to 6 years ago (2006 - 2007)	1,791	16%
6 to 9 years ago (2003 - 2005)	3,328	31%
Over 9 years ago (2002 or earlier)	4,308	40%
I'm not sure	279	3%
Total	**10,896**	**100%**

TECHNICAL COMPETENCE

How technically proficient are you?

HALF OF THE RESPONDENTS CONSIDER THEMSELVES ‘POWER USERS’ OR ‘TECHNICAL GURUS’, GIVING THE SURVEY A TECHNICAL BIAS.

Person filling in survey	**%**	**n**
Unsure	0%	12
Beginner	0%	48
Still learning	9%	1,015
Confident	41%	4,442
Power user	21%	2,288
Technical Guru	28%	3,091
Total	**100%**	**10,896**

WHO IS YOUR CURRENT BROADBAND PROVIDER?

92% OF SURVEY RESPONSES WERE FROM USERS OF FROM 'TOP PROVIDERS' (BT/PLUSNET, VIRGIN MEDIA, TALKTALK/AOL, SKY, O2/BE AND ORANGE) VERSUS 95% OF UK MARKET SHARE

SOME BIAS TOWARDS O2/BE (8% OF RESPONDENTS VS 3% OF MARKET) USERS AND THOSE SUBSCRIBED TO SMALLER PROVIDERS (8% OF RESPONDENTS VS 5% OF MARKET)

ISP (Min 100 responses)	n	%	Adj. %[1]	UK Market Share[2]
BT Broadband	2,446	22%	31%	30%
Virgin Media	1,824	17%	17%	21%
TalkTalk Broadband (Tiscali)	1,219	11%	14%	19%
Sky Broadband	1,037	10%	19%	19%
PlusNet	978	9%	see BT	
O2	596	5%	8%	3%
Zen Internet	417	4%	n/a	
Orange (Wanadoo, Freeserve)	362	3%	3%	3%
BE	352	3%	see O2	
AOL Broadband	183	2%	see TalkTalk	
TalkTalk Business (Opal, Pipex, Nildram, F2S)	146	1%	see TalkTalk	
Eclipse Internet	124	1%	n/a	
AAISP	119	1%	n/a	
IDNet	109	1%	n/a	
Demon Internet	100	1%	n/a	
Other	884	8%	n/a	
Total	**10,896**	**100%**		

[1] Adjusted percentage includes incorporation of sub-brands/divisions into the main figure (e.g. PlusNet within BT Plc figures to match against market share data.

[2] Source: UK Broadband Factsheet Q3/2012

BUSINESS USE OF HOME BROADBAND

DO YOU USE YOUR HOME-BASED BROADBAND CONNECTION FOR BUSINESS USE?

AROUND HALF OF THE USERS USE THEIR BROADBAND FOR BUSINESS USE (46%); HALF (51%) DO NOT

	n	%
Not answered	179	2%
No - I just use it for personal use	5,578	51%
Not applicable / Other	82	1%
Regularly - I work from home most of the time	1,466	13%
Sometimes - I occasionally work from home	3,591	33%
Total	**10,896**	**100%**

BUSINESS USE BY PRICE RANGE

USERS WHO WORK FROM HOME ARE MARGINALLY MORE LIKELY TO PAY MORE FOR THEIR BROADBAND SERVICE; 72% OF BUSINESS USERS WILL PAY £20 OR MORE AS COMPARED TO 66% OF USERS WHO ONLY USE THEIR INTERNET CONNECTION FOR PERSONAL USE.

Monthly Cost	Personal Use Only	Work Use	Average
£9.99 or less	6%	5%	6%
£10.00 - £14.99	11%	9%	10%
£15.00 - £19.99	17%	15%	16%
£20.00 - £29.99	31%	33%	32%
£30.00 - £39.99	15%	17%	16%
£40.00 - £49.99	7%	9%	8%
£50.00 - £59.99	4%	4%	4%
£60.00 - £69.99	3%	3%	3%
More than £70/month	6%	6%	6%
Total	**5,426**	**4,917**	**10,343**

BUSINESS USE BY REGION[3]

6 IN 10 BROADBAND USERS (59%) IN LONDON USE THEIR BROADBAND FOR WORKING FROM HOME AT LEAST SOME OF THE TIME WHILST ONLY A THIRD (32%) IN NORTHERN IRELAND DID SO. SOUTH EAST ENGLAND ALSO HAS A HIGHER DEGREE OF HOME WORKING THAN OTHER REGIONS OF THE UK WITH THE NORTH EAST HAVING THE FEWEST HOME WORKERS.

Region	Personal use only	Personal & Business Use	n
East Midlands	53%	47%	792
East of England	52%	48%	1,000
London	41%	**59%**	1,006
North East England	64%	**36%**	340
North West England	55%	45%	1,236
Northern Ireland	68%	**32%**	182
Scotland	58%	42%	1,001
South East England	47%	**53%**	2,082
South West England	54%	46%	1,226
Wales	59%	41%	540
West Midlands	54%	46%	610
Yorkshire and Humber	58%	42%	613
Total	**52%**	**48%**	**10,628**

[3] The 12 UK administrative regions (http://en.wikipedia.org/wiki/Regions_of_England) were defined based on the first one or two letters of the postcode of the respondent and therefore a small number of responses may be attributed to bordering regions.

BUSINESS USE BY PROVIDER

ORANGE, TALKTALK (CONSUMER) AND AOL USERS ARE LESS LIKELY TO USE THEIR BROADBAND CONNECTIONS FOR WORK WHILST THOSE ON AAISP AND ZEN INTERNET ARE MOST LIKELY TO USE THEIR HOME BROADBAND CONNECTIONS WHEN WORKING FROM HOME.

Broadband Provider	Personal use only	Personal & work	Regular Work	Occasional Work	n
BT Broadband	50%	48%	15%	33%	2,446
Virgin Media	54%	44%	11%	33%	1,824
TalkTalk Broadband (Tiscali)	66%	32%	9%	23%	1,219
Sky Broadband	52%	46%	7%	40%	1,037
O2	51%	47%	9%	39%	596
PlusNet	50%	48%	15%	34%	978
Zen Internet	32%	66%	26%	40%	417
Orange (Wanadoo, Freeserve)	61%	37%	10%	27%	362
BE	40%	58%	17%	41%	352
AOL Broadband	68%	30%	8%	21%	183
TalkTalk Business (Opal, Pipex, Nildram, F2S)	44%	55%	27%	28%	146
Eclipse Internet	40%	58%	27%	31%	124
AAISP	15%	79%	25%	54%	119
IDNet	46%	52%	22%	30%	109
Demon Internet	37%	60%	28%	32%	100
Others	45%	47%	15%	31%	884
	51%	**46%**	**13%**	**33%**	**10,896**

BUNDLING & PRICING

DO YOU BUY YOUR BROADBAND SERVICE AS PART OF A BUNDLE?

MOST PEOPLE (71%) BUY BROADBAND WITH AT LEAST ONE ADDITIONAL SERVICE.

28% BUY BROADBAND AS A STAND-ALONE SERVICE

47% BUY BROADBAND + TELEPHONE; 21% BUY TRIPLE/QUAD PLAY

Bundles	n	%
Broadband + Telephone	5,113	47%
Broadband only	3,049	28%
Broadband + Multiple services (e.g. Broadband + Telephone + TV)	2,330	21%
Broadband + TV	148	1%
Broadband + Mobile	134	1%
Broadband + Other services	57	1%
I don't know / Not sure / Not answered	65	0%
Total	**10,896**	**100%**

BUNDLING BY KEY PROVIDERS

TRIPLE/QUADPLAY LEADERS ARE SKY & VIRGIN MEDIA

BROADBAND + HOME PHONE LEADERS = TALKTALK AND BT

PLUSNET & O2 ARE SPLIT BETWEEN PROVIDING BROADBAND ONLY & BROADBAND + HOME PHONE

Broadband Provider	Broadband only	Broadband + Telephone	Triple/Quad Play	n
BT Broadband	9%	80%	11%	2,415
Virgin Media	15%	21%	64%	1,775
TalkTalk Broadband	4%	94%	2%	1,204
PlusNet	45%	55%	0%	972
Sky Broadband	3%	12%	85%	963
O2	56%	41%	3%	512
Total	**1,286**	**4,282**	**2,273**	**7,841**

Based on min 500 respondents per provider

HOW MUCH DO YOU PAY FOR YOUR BROADBAND PACKAGE OR BUNDLE (PER MONTH)?

PROVIDERS OFFERING MULTIPLE SERVICES ARE LIKELY TO GET MUCH MORE REVENUE FROM USERS, ESPECIALLY THOSE OFFERING TRIPLE/QUAD PLAY SERVICES.

56% OF TRIPLE/QUAD PLAY CUSTOMERS PAY MORE THAN £50/MONTH AS COMPARED TO ONLY 4% OF 'BROADBAND AND PHONE' CUSTOMERS.

ADDING MULTIPLE SERVICES ALSO INCREASES THE STICKINESS OF USERS AS SWITCHING IS MORE COMPLICATED AND CHOICES ARE OFTEN MORE RESTRICTED.

Price (per month)	Broadband only	Broadband + Telephone	Triple/Quad Play
£9.99 or less	10%	3%	4%
£10.00 - £14.99	18%	7%	2%
£15.00 - £19.99	26%	15%	3%
£20.00 - £29.99	31%	42%	9%
£30.00 - £39.99	9%	21%	12%
£40.00 - £49.99	3%	7%	15%
£50.00 - £59.99	1%	1%	16%
£60.00 - £69.99	0%	0%	12%
More than £70/month	0%	0%	25%
Not sure / unanswered	2%	3%	3%

Sample = 10,492

PRICE BY REGION[4]

There are no significant variations between prices paid for broadband services across the 12 UK regions. Variations are likely to be attributable to different levels of bundling across region.

	Paying at least £/month										
Region	**£0**	**£10**	**£15**	**£20**	**£30**	**£40**	**£50**	**£60**	**£70**	**Not sure**	**n**
East Midlands	98%	92%	83%	70%	39%	20%	13%	7%	5%	2%	805
East of England	97%	93%	83%	68%	35%	18%	12%	7%	4%	3%	1,012
London	98%	91%	81%	67%	39%	23%	16%	12%	7%	2%	1,015
North East England	99%	93%	84%	70%	43%	28%	19%	13%	10%	1%	345
North West England	97%	90%	81%	66%	35%	21%	13%	9%	7%	3%	1,257
Northern Ireland	99%	94%	84%	70%	40%	25%	13%	6%	4%	1%	186
Scotland	99%	93%	84%	68%	34%	21%	15%	12%	8%	1%	1,015
South East England	98%	92%	83%	68%	38%	21%	13%	9%	6%	2%	2,108
South West England	97%	92%	81%	63%	33%	17%	9%	7%	4%	3%	1,243
Wales	99%	94%	83%	68%	34%	18%	10%	5%	3%	1%	548
West Midlands	98%	93%	84%	70%	39%	24%	15%	11%	7%	2%	618
Yorkshire and Humber	99%	95%	86%	66%	32%	21%	12%	6%	3%	1%	621
Total	**98%**	**92%**	**83%**	**67%**	**36%**	**21%**	**13%**	**9%**	**6%**	**2%**	**10,773**

[4] Definition of region as above.

DO USERS COMPARE PRICES REGULARLY?

PRICE –V– HOW LONG A USER HAS BEEN USING A BROADBAND PROVIDER

There does not appear to be a link between people paying more and how long they've been with their current provider. Providers are therefore generally passing savings to consumers, or consumers are actively changing packages with the same provider.

	< 12 months	1 to 2 years	2 to 4 years	Over 4 years
Unspecified	1%	1%	1%	1%
£9.99 or less	5%	4%	7%	5%
£10.00 - £14.99	7%	8%	13%	9%
£15.00 - £19.99	14%	15%	16%	16%
£20.00 - £29.99	32%	31%	31%	31%
£30.00 - £39.99	18%	17%	14%	15%
£40.00 - £49.99	9%	9%	6%	7%
£50.00 - £59.99	5%	5%	4%	4%
£60.00 - £69.99	3%	2%	3%	3%
More than £70	4%	6%	5%	7%
Not sure	2%	2%	1%	3%
Total	**100%**	**100%**	**100%**	**100%**

PRICE –V– EXPERIENCE SHOPPING FOR BROADBAND PROVIDERS

FIRST TIME BROADBAND SHOPPERS

There appears to be no significant difference in those who have signed up to broadband for the first time paying any more/less than those who have used multiple providers. This indicates broadband consumers are able to find the best priced deal easily.

	Is this your first broadband provider?	
Price Range	**No**	**Yes**
Unspecified	1%	1%
£9.99 or less	6%	4%
£10.00 - £14.99	9%	10%
£15.00 - £19.99	15%	16%
£20.00 - £29.99	30%	33%
£30.00 - £39.99	16%	14%
£40.00 - £49.99	8%	7%
£50.00 - £59.99	4%	4%
£60.00 - £69.99	3%	3%
More than £70	6%	6%
Not sure	2%	3%
Total	**100%**	**100%**

PRICE PAID AND HISTORY OF BROADBAND SHOPPING

How many broadband providers have you had service from? (including current)

(for those users who have switched at least once)

THERE IS NO SIGNIFICANT DIFFERENCE IN COSTS PAID BY THOSE WHO HAVE SWITCHED MORE OFTEN

Price Range	2	3	4	5	6+
Unspecified	0%	1%	1%	1%	1%
£9.99 or less	6%	7%	5%	4%	4%
£10.00 - £14.99	9%	11%	9%	9%	8%
£15.00 - £19.99	16%	16%	14%	13%	10%
£20.00 - £29.99	30%	30%	33%	30%	35%
£30.00 - £39.99	17%	15%	15%	17%	17%
£40.00 - £49.99	7%	7%	8%	10%	10%
£50.00 - £59.99	4%	4%	5%	6%	5%
£60.00 - £69.99	3%	3%	3%	3%	3%
More than £70	6%	5%	6%	5%	7%
Not sure	2%	2%	2%	1%	1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Sample = 7,342

BRAND LOYALTY BY AGE

USERS AGED 65 AND OVER ARE TWICE AS LIKELY (56%) TO STAY WITH THEIR BROADBAND PROVIDER FOR MORE THAN FOUR YEARS AS COMPARED TO USERS AGED 18-24 (28%).

THE 18-34 AGE GROUP ARE MOST LIKELY TO CHANGE PROVIDERS MORE OFTEN WITH ALMOST HALF[5] OF THE RESPONDENTS USING A BROADBAND PROVIDER FOR LESS THAN TWO YEARS[6].

	Age						
Time with current provider	**18 - 24**	**25 - 34**	**35 - 49**	**50 - 64**	**65 +**	**Average**	**n**
Less than 12 months	27%	25%	20%	13%	11%	16%	1,745
1 to 2 years	21%	21%	17%	14%	12%	15%	1,646
2 to 4 years	23%	24%	21%	22%	21%	22%	2,356
Over 4 years	28%	29%	41%	50%	56%	46%	4,987
I don't know / Can't remember	1%	0%	0%	0%	1%	0%	31
No. of respondents	**359**	**1,118**	**2,827**	**3,568**	**2,893**	**100%**	**10,765**

SELECTING A PROVIDER

HOW DID YOU SELECT YOUR CURRENT BROADBAND PROVIDER? (TICK ALL THAT APPLY)

There is a wide spread of marketing methods which were successful across this category.

%	%	n
Used a broadband comparison site	20%	2,232
Previous experience of provider	18%	1,918
A friend/colleague advised me	14%	1,476
Saw an advert in the newspaper, TV, billboard or on public transport	12%	1,280
Saw an advert online	10%	1,093
Used an online forum	9%	1,025
I don't remember	9%	936
My employer arranges my broadband service	1%	141

[5] There is a small bias where children leave their parental homes and subscribing to their first broadband service in these categories (18-24).
[6] This may be due to the 18-24 age group moving home more frequently.

IMPORTANCE OF ASPECTS OF BROADBAND SERVICE

Please rank the following in order of importance when selecting a broadband package

(1 = most important; 11= least important)

IN TERMS OF RANKINGS, THE MOST IMPORTANT CATEGORY (36% SCORING AS THE MOST IMPORTANT; 69% CLASSIFYING IT AS TOP 3) IS QUALITY & RELIABILITY OF SERVICE.

Item / Rank	1	2	3	4	5	6	7	8	9	10	11	Not Ranked
Price	15%	13%	14%	14%	12%	8%	4%	3%	1%	1%	1%	14%
Download speed	21%	25%	18%	11%	6%	3%	2%	1%	0%	0%	0%	12%
Upload speed	2%	6%	10%	11%	12%	11%	9%	8%	4%	2%	1%	25%
Customer Service	5%	8%	10%	12%	15%	15%	9%	5%	2%	1%	1%	17%
Quality & Reliability	36%	18%	15%	10%	5%	2%	1%	0%	0%	0%	0%	10%
Download Allowance / FUP	8%	14%	15%	15%	12%	8%	5%	3%	2%	1%	1%	17%
Additional Services	0%	0%	1%	1%	1%	2%	4%	7%	13%	17%	17%	37%
Ratings / User Reviews	2%	2%	3%	4%	5%	7%	11%	14%	10%	6%	5%	32%
ISP staff participate on online forums	0%	0%	1%	1%	2%	4%	5%	8%	13%	14%	15%	36%
IP Addressing (blocks of IPv4; IPv6 support)	1%	1%	1%	2%	3%	4%	5%	6%	11%	15%	16%	36%
Reputation/brand	4%	5%	5%	7%	9%	11%	13%	9%	5%	4%	3%	25%

SPEEDS

ADVERTISED (HEADLINE) SPEEDS

WHAT IS THE ADVERTISED DOWNLOAD SPEED OF YOUR BROADBAND CONNECTION?

ACTION: SHOW THESE IN GROUPS, <8, 8-10MBPS, 12-24MBPS, 30-50MBPS, 60MBPS+

It is likely that a significant proportion of users will have been upgraded from ‘up to 8 meg’ services to ADSL2+ without being aware of the change; and may not receive more than 8 Mbps due to line distance regardless.

Advertised Download speed	%	n
Not answered	1%	97
Unsure / Don't know	5%	593
Download speed not advertised	1%	138
Less than 8Mbps	6%	625
'up to 8 meg'	27%	2,992
'up to 10 meg'	5%	533
'up to 100 meg'	3%	344
'up to 12 meg'	2%	203
'up to 16 meg'	7%	805
'up to 20 meg'	15%	1,601
'up to 24 meg'	7%	787
'up to 30 meg'	4%	440
'up to 40 meg'	5%	559
'up to 50 meg'	2%	211
'up to 60 meg'	3%	367
'up to 80 meg'	5%	549
Faster than 100Mbps	0%	48
Total	**100%**	**10,892**

WHAT IS THE ADVERTISED UPLOAD SPEED OF YOUR BROADBAND CONNECTION?

25% OF USERS DO NOT KNOW WHAT THEIR UPLOAD SPEED IS; AS COMPARED TO 5% FOR DOWNLOAD SPEEDS

Advertised Upload speed	%	n
Not answered	1%	160
Upload speed not advertised	10%	1,059
Unsure / Don't know	25%	2,767
'up to 250-300 Kbps'	4%	466
'up to 400-500 Kbps'	10%	1,045
'up to 800-900 Kbps'	4%	462
'up to 1 meg'	17%	1,859
'up to 2 meg'	8%	860
'up to 3 meg'	3%	322
'up to 4 meg'	1%	130
'up to 5 meg'	4%	408
'up to 10 meg'	6%	624
'up to 15 meg'	1%	105
'up to 20 meg'	5%	536
'faster than 20 meg'	1%	89
Total	**100%**	**10,892**

HOME ENVIRONMENT

POWERLINE IS A MARGINAL SOLUTION; MOST PEOPLE ARE FINE TO USE WIRELESS.

Is the computer you're using connected to the Internet through a physical cable or a wireless connection?	%	n
Unanswered	1%	62
I don't know / not sure	0%	24
Mobile Broadband (3G) connection	0%	22
Other	0%	27
Powerline connection	4%	369
Wireless (Wi-Fi) connection	43%	4,087
Ethernet connection	52%	4,891
Total	**100%**	**9,482**

RATINGS

VALUE FOR MONEY

OVERALL

MOST USERS (56%) BELIEVE THEY ARE RECEIVING GOOD VALUE FOR MONEY (RATED 4-5 OF 5); 83% SEEM SATISFIED (RATED 3-5 OF 5).

Rating (scale: 1=bad, 5=good)	%	n
1	6%	662
2	11%	1,162
3	27%	2,903
4	33%	3,490
5	23%	2,500
Total	**100%**	**10,717**

ISP SPLIT (VALUE FOR MONEY)

MOST VALUE: PLUSNET, O2, BE AND AAISP*

LEAST VALUE: AOL*, DEMON*, TALKTALK BUSINESS*

* NOTE THAT THESE PROVIDERS HAVE FAR FEWER RESPONSES THAN SOME LARGER ONES SO CAUTION IS ADVISED IN INTERPRETING THESE RESULTS.

	%							Total
Provider	**1**	**2**	**3**	**4**	**5**	**1 / 2**	**4 / 5**	**n**
BT Broadband	9%	16%	34%	28%	12%	25%	40%	2,408
Virgin Media	7%	13%	34%	33%	14%	20%	47%	1,799
TalkTalk Broadband (Tiscali)	5%	9%	23%	35%	27%	14%	62%	1,203
Sky Broadband	5%	10%	20%	31%	35%	15%	66%	1,031
PlusNet	2%	5%	18%	38%	38%	7%	76%	972
Other	6%	9%	27%	33%	25%	15%	58%	815
O2	3%	6%	18%	35%	38%	9%	73%	588
Zen Internet	0%	5%	30%	40%	24%	5%	64%	415
Orange (Wanadoo, Freeserve)	10%	15%	22%	26%	27%	25%	53%	358
BE	1%	4%	25%	34%	36%	5%	70%	351
AOL Broadband	20%	18%	27%	21%	14%	38%	35%	182
TalkTalk Business (Opal, Pipex, Nildram, F2S)	12%	17%	31%	28%	12%	29%	40%	143
Eclipse Internet	2%	10%	23%	43%	22%	12%	65%	124
AAISP	4%	3%	20%	44%	29%	7%	73%	119
IDNet	1%	6%	32%	42%	19%	7%	61%	109
Demon Internet	18%	14%	34%	24%	10%	32%	34%	100
Total	**6%**	**11%**	**27%**	**33%**	**23%**			**10,717**

Minimum sample per ISP = 100

SPEED (RATING)

67% OF USERS ON AAISPWERE VERY SATISFIED WITH THEIR SPEEDS

81% OF USERS ON VIRGIN MEDIA WERE MORE THAN SATISFIED (RATED 4-5 OF 5); 91% AAISP; 71% IDNET & ZEN;

AOL, ORANGE AND DEMON USERS APPEARED TO BE LEAST SATISFIED

	%					Total
Broadband Provider	**1**	**2**	**3**	**4**	**5**	**n**
BT Broadband	19%	15%	23%	24%	19%	2,400
Virgin Media	6%	7%	16%	30%	41%	1,801
TalkTalk Broadband (Tiscali)	19%	20%	27%	24%	11%	1,193
Sky Broadband	16%	18%	26%	24%	16%	1,028
PlusNet	9%	13%	24%	32%	22%	968
Other	14%	11%	23%	27%	24%	812
O2	10%	12%	30%	31%	17%	589
Zen Internet	4%	7%	17%	33%	38%	414
Orange (Wanadoo, Freeserve)	23%	25%	27%	18%	7%	354
BE	4%	8%	26%	35%	27%	350
AOL Broadband	36%	26%	22%	11%	6%	180
TalkTalk Business (Opal, Pipex, Nildram, F2S)	21%	21%	37%	14%	8%	145
Eclipse Internet	15%	12%	23%	28%	22%	123
AAISP	2%	1%	7%	24%	67%	118
IDNet	1%	6%	22%	40%	31%	109
Demon Internet	29%	18%	29%	21%	3%	98
Total	**14%**	**14%**	**23%**	**27%**	**23%**	**10,682**

SPEED RATING VARIATION ACROSS REGIONS

USERS IN LONDON AND THE WEST MIDLANDS ARE MOST HAPPY WITH THEIR BROADBAND CONNECTIONS WHILST THOSE IN WALES ARE MOST CONCERNED.

Region	1 - 2	3	4 - 5	n
East Midlands	26%	23%	52%	797
East of England	31%	22%	47%	1,003
London	21%	22%	57%	1,005
North East England	30%	22%	48%	344
North West England	26%	24%	50%	1,246
Northern Ireland	24%	26%	50%	182
Scotland	30%	24%	46%	1,015
South East England	25%	22%	53%	2,089
South West England	31%	24%	45%	1,224
Wales	35%	23%	43%	541
West Midlands	23%	22%	55%	616
Yorkshire and Humber	30%	24%	46%	615
Total	**27%**	**23%**	**50%**	**10,677**

Rated (1 = worst score; 5 = best score)

RELIABILITY

AAISP, ZEN INTERNET, IDNET AND ECLIPSE TOP THE RELIABILITY RANKINGS.

AOL AND ORANGE USERS ARE THE LEAST SATISFIED ON RELIABILITY OF THEIR BROADBAND CONNECTIONS

	%					Total n
Broadband Provider	**1**	**2**	**3**	**4**	**5**	
BT Broadband	6%	9%	19%	34%	32%	2,416
Virgin Media	8%	9%	18%	36%	29%	1,794
TalkTalk Broadband (Tiscali)	9%	12%	22%	35%	22%	1,197
Sky Broadband	4%	8%	16%	32%	39%	1,029
PlusNet	2%	5%	12%	36%	44%	971
Other	5%	8%	14%	31%	41%	818
O2	2%	5%	13%	36%	44%	588
Zen Internet	0%	1%	4%	19%	76%	415
Orange (Wanadoo, Freeserve)	12%	17%	20%	32%	19%	357
BE	3%	4%	13%	31%	49%	348
AOL Broadband	17%	14%	29%	25%	15%	181
TalkTalk Business (Opal, Pipex, Nildram, F2S)	8%	12%	24%	35%	21%	145
Eclipse Internet	2%	4%	6%	27%	61%	122
AAISP	1%	1%	2%	16%	81%	118
IDNet	0%	2%	6%	27%	65%	109
Demon Internet	4%	14%	21%	27%	33%	99
Total	**6%**	**8%**	**17%**	**33%**	**36%**	**10,707**

CUSTOMER SERVICE

AAISP, ZEN INTERNET, AND IDNET LEAD THE CUSTOMER SERVICE RANKINGS

AOL, TALKTALK AND ORANGE HAVE THE LEAST SATISFIED CUSTOMERS.

	%					Total
Broadband Provider	**1**	**2**	**3**	**4**	**5**	**N**
BT Broadband	14%	15%	29%	27%	15%	2,361
Virgin Media	16%	16%	27%	27%	14%	1,763
TalkTalk Broadband (Tiscali)	22%	18%	31%	19%	10%	1,158
Sky Broadband	6%	10%	26%	34%	23%	1,002
PlusNet	2%	3%	13%	31%	52%	958
Other	6%	9%	14%	27%	45%	798
O2	2%	4%	17%	30%	47%	575
Zen Internet	0%	1%	3%	15%	82%	411
Orange (Wanadoo, Freeserve)	21%	18%	25%	23%	13%	347
BE	3%	1%	12%	33%	51%	344
AOL Broadband	27%	28%	24%	15%	6%	177
TalkTalk Business (Opal, Pipex, Nildram, F2S)	17%	17%	37%	18%	11%	138
Eclipse Internet	3%	6%	10%	21%	60%	124
AAISP	2%	0%	2%	3%	93%	119
IDNet	0%	1%	6%	25%	69%	108
Demon Internet	16%	15%	18%	30%	20%	99
Total	**11%**	**12%**	**23%**	**26%**	**28%**	**10,482**

TECHNOLOGY

What technology does this service use?	%	n
ADSL-based technologies (using phone line)	65%	7,109
Cable Broadband (using cable TV network)	13%	1,375
Fibre to the Cabinet (FTTC - VDSL)	12%	1,274
Don't Know / Not sure	4%	399
Fixed Wireless (Wi-Fi)	2%	268
Other	2%	237
Fibre to the Home (FTTP)	1%	146
Mobile broadband (HSPA / 3G / GPRS)	0%	32
Satellite	0%	28
Fixed Wireless (WiMAX)	0%	24
	100%	**10,892**

SUPPORT

CONTACT METHOD

	Telephone	E-mail	Post	Website	Online Forums	Social Media	Other Methods
Contact Method / Number of times	**%**	**%**	**%**	**%**	**%**	**%**	**%**
Never	30%	54%	78%	47%	66%	76%	77%
Used	66%	30%	1%	37%	14%	4%	2%
Once	24%	13%	1%	16%	5%	2%	1%
Twice	25%	10%	0%	12%	4%	1%	0%
Many times	17%	7%	0%	9%	5%	1%	1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Sample = 10,892

SOCIAL MEDIA

ISP COMPARISON

Of the major players, Virgin Media has strongest social media presence and TalkTalk/Orange the weakest.

If smaller players, AAISP/Eclipse had higher social media use

	Unsure	Yes	No	n
BT Broadband	19%	4%	76%	2,445
Virgin Media	18%	8%	74%	1,824
TalkTalk Broadband (Tiscali)	19%	2%	80%	1,219
Sky Broadband	13%	5%	83%	1,037
PlusNet	25%	4%	72%	978
Other	25%	6%	69%	882
O2	19%	4%	77%	596
Zen Internet	21%	5%	74%	417
Orange (Wanadoo, Freeserve)	22%	2%	76%	361
BE	18%	5%	78%	352
AOL Broadband	17%	1%	82%	183
TalkTalk Business (Opal, Pipex, Nildram, F2S)	17%	1%	82%	146
Eclipse Internet	23%	6%	71%	124
AAISP	18%	8%	73%	119
IDNet	22%	1%	77%	109
Demon Internet	24%	2%	74%	100
Total	**19%**	**5%**	**76%**	**10,892**

BY TECHNICAL COMPETENCE

VERY 'TECHNICAL' USERS ARE MORE LIKELY TO USE SOCIAL MEDIA

Skill Level	Unsure	Yes	No	n
Unsure[7]	8%	17%	75%	12
Beginner	17%	4%	79%	48
Still learning	24%	1%	75%	1,014
Confident	22%	2%	76%	4,441
Power user	18%	5%	78%	2,288
Technical Guru	15%	10%	76%	3,089
Total	**19%**	**5%**	**76%**	**10,892**

BY AGE[8]

THE VAST MAJORITY OF USERS (76%) DID NOT ENGAGE WITH THEIR BROADBAND PROVIDERS USING SOCIAL MEDIA

THOSE AGED 18-34 ARE TWICE AS LIKELY TO USE SOCIAL MEDIA (FACEBOOK, TWITTER, ETC.) TO CONTACT THEIR PROVIDER THAN THOSE AGED 35-49 AND MUCH MORE LIKELY THAN THOSE AGED 50+

Age Group	Unsure	Yes	No	n
18 - 24	6%	16%	78%	362
25 - 34	10%	13%	76%	1,128
35 - 49	16%	7%	78%	2,842
50 - 64	21%	2%	77%	3,584
Over 65	26%	1%	74%	2,897
Prefer not to say	29%	4%	67%	79
Grand Total	**19%**	**5%**	**76%**	**10,892**

[7] Caution: very low sample size

[8] Analysis derived from question asking 'how many times..' a user contacted using their provider using social media.

RECOMMENDING BROADBAND PROVIDERS TO FRIENDS

6 IN 10 USERS ARE WILLING TO RECOMMEND BROADBAND PROVIDERS TO THEIR FRIENDS.

There is no significant difference in willingness to recommend broadband providers by age.

Age Group	Maybe	No	Yes	n
18 - 24	24%	18%	58%	359
25 - 34	24%	11%	65%	1,113
35 - 49	27%	12%	61%	2,804
50 - 64	28%	12%	59%	3,545
Over 65	29%	12%	59%	2,879
Prefer not to say	31%	21%	48%	77
Total	**28%**	**12%**	**60%**	**10,777**

SWITCHING PROVIDERS

HOW FREQUENTLY DO YOU COMPARE DEALS?

56% OF USERS REVIEW THEIR CHOICE OF BROADBAND PROVIDE AT LEAST ONCE A YEAR.

36% OF USERS RARELY OR NEVER REVIEW THEIR PROVIDER.

How often do you review your choice of broadband provider?	%	n
Not sure	2%	167
More than once a year	25%	2,673
Every year	31%	3,349
Every 2 years	7%	775
Rarely	28%	3,042
Never	8%	827
Total	**100%**	**10,833**

COMPARISON OF PRICE PAID TO HOW FREQUENTLY DEALS ARE COMPARED

USERS WHO COMPARE THEIR PACKAGES MORE OFTEN ARE NOT PAYING SUBSTANTIALLY MORE THAN THOSE WHO COMPARE THEIR DEALS REGULARLY. BROADBAND PROVIDERS ARE NOT TAKING ADVANTAGE OF CONSUMER IGNORANCE ON PRICES.

	%		Total n
	Less than once a year	At least once a year	
£10.00 - £14.99	9%	10%	1,023
£15.00 - £19.99	16%	15%	1,628
£20.00 - £29.99	30%	33%	3,324
£30.00 - £39.99	16%	15%	1,641
£40.00 - £49.99	8%	8%	804
£50.00 - £59.99	5%	4%	456
£60.00 - £69.99	4%	3%	315
£9.99 or less	5%	6%	576
More than £70/month	7%	5%	612
Total	**100%**	**100%**	**10,379**

ARE YOU CONSIDERING SWITCHING PROVIDERS?

BY AGE

THERE IS A MARGINAL INCLINATION BY YOUNGER USERS TO SWITCH BROADBAND PROVIDERS MORE OVER OLDER USERS.

Age Group	Not Answered	No plans to switch	Not sure / Not applicable	Switching soon	Total n
18 - 24	1%	52%	22%	25%	362
25 - 34	1%	56%	20%	23%	1,128
35 - 49	1%	57%	21%	21%	2,842
50 - 64	1%	60%	22%	17%	3,584
Over 65	1%	62%	24%	14%	2,897
Prefer not to say	3%	38%	30%	29%	79
Total	**1%**	**59%**	**22%**	**18%**	**10,892**

BY PROVIDER

TALKTALK BUSINESS USERS MOST LIKELY TO SWITCH (WARNING: LOW NUMBERS). TALKTALK BROADBAND (CONSUMER) 60% MORE LIKELY TO SWITCH THAN BT OR VIRGIN MEDIA VUSTOMER; O2 (REPUTATION FOR GOOD CUSTOMER SERVICE) HAS 33% EXPECTED CHURN RATE!

ZEN AND AAISP USERS VERY LOYAL

Provider	No plans to switch	Not sure / Not applicable	Switching soon	n
BT Broadband	63%	23%	15%	2,431
Virgin Media	66%	18%	15%	1,814
TalkTalk Broadband (Tiscali)	49%	27%	24%	1,211
Sky Broadband	57%	24%	19%	1,033
PlusNet	71%	19%	10%	973
Other	60%	22%	18%	828
O2	42%	25%	33%	589
Zen Internet	84%	11%	5%	416
Orange (Wanadoo, Freeserve)	39%	32%	29%	360
BE	43%	29%	28%	350
AOL Broadband	32%	34%	33%	180
TalkTalk Business (Opal, Pipex, Nildram, F2S)	32%	27%	41%	145
Eclipse Internet	71%	19%	10%	124
AAISP	87%	9%	3%	118
IDNet	71%	18%	11%	109
Demon Internet	35%	35%	29%	99
Total	**59%**	**22%**	**18%**	**10,780**

PROVIDE MIGRATION TRENDS (WINNERS/LOSERS)

BT IS THE WINNER IN TERMS OF INBOUND MIGATIONS FOLLOWED BY VIRGIN MEDIA AND SKY BROADBAND

AROUND A THIRD OF TALKTALK, ORANGE, SKY AND BE/O2 USERS ARE MOVING TO BT

PLUSNET USERS ARE MIGRATING TO A NUMBER OF DIFFERENT PROVIDERS.

O2/BE ARE LOSING USERS 43-56% TO BT & VIRGIN MEDIA, PROBABLY DUE TO THE 'FIBRE OPTIC' BROADBAND ADVERTISING BOTH COMPANIES ARE PROMOTING

ORANGE, BE AND O2 SEEM TO NOT BE GROWING FROM SWITCHERS

GAINING PROVIDER (← not winning new business .. winning new business)

	LOSING PROVIDER									
	Others	BE	BT Broadband	I don't know	O2	Orange (Wanadoo, Freeserve)	PlusNet	Sky Broadband	TalkTalk Broadband (Tiscali)	Virgin Media
BT Broadband	19%	30%	1%	16%	29%	31%	14%	30%	33%	28%
Others	23%	13%	17%	18%	14%	13%	22%	7%	12%	15%
Virgin Media	10%	26%	21%	25%	19%	9%	12%	29%	11%	3%
Sky Broadband	10%	10%	19%	4%	19%	11%	16%	1%	14%	18%
TalkTalk Broadband (Tiscali)	11%	4%	19%	17%	4%	17%	15%	9%	5%	12%
PlusNet	11%	4%	9%	10%	11%	6%	1%	11%	13%	8%
O2	7%	12%	7%	5%	0%	9%	11%	7%	6%	8%
BE	6%	0%	4%	2%	1%	3%	7%	3%	2%	5%
Orange (Wanadoo, Freeserve)	2%	1%	3%	3%	4%	1%	4%	2%	2%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Sample = 7,751

Colour coding representing strength of transfers out from 'losing' provider to each gaining provider; Red is high proportion of lost customers migrating to the gaining provider.

REASONS FOR SWITCHING

FACTORS THAT CONSUMERS CONSIDER – THOSE PLANNING TO SWITCH

DOWNLOAD SPEED IS BY FAR THE MOST IMPORTANT FACTOR (64%) IN SWITCHING PROVIDERS

PRICE (47%) AND QUALITY/RELIABILITY (40%) OF SERVICE ARE THE 2ND/3RD MOST IMPORTANT

MINIMUM CONTRACT TERMS ARE NOT A MAJOR FACTOR IN SWITCHING (ONLY 11% SWITCH AS THEY COME TO THE END OF THEIR CONTRACT)

QUALITY/RELIABILITY PROBLEMS CAN BE CAUSED BY ISSUES ASSOCIATED WITH THE TELEPHONE LINE FOR ADSL BROADBAND, SO WHILST 40% THINK THIS IS A REASON TO SWITCH, IT MAY NOT FIX THE PROBLEM.

Reasons for considering switching	%	n
Download Speed	64%	1,254
Price	47%	922
Quality & Reliability of the broadband connection	40%	789
Customer Service	33%	644
Upload Speed	33%	640
My current provider doesn't offer fibre broadband	26%	505
Download allowance / fair usage policy	22%	431
Approaching end of contract	11%	215
Other	11%	215
Ratings / User reviews / Awards	5%	101
Recommendation from friend/colleague	3%	53
Additional services (web hosting, etc.)	2%	39
I can't really say	0%	8
Total no of users considering switching =		**1,957**

THE MOST IMPORTANT FACTOR – THOSE PLANNING TO SWITCH

Most important reason for switching?	%	n
Download Speed	33%	639
Price	18%	353
Quality & Reliability of the broadband connection	18%	339
My current provider doesn't offer fibre broadband	10%	189
Customer Service	8%	146
Download allowance / fair usage policy	5%	105
Other	4%	76
Upload Speed	2%	33
Approaching end of contract	1%	18
I can't really say	1%	16
Additional services (web hosting, etc.)	1%	12
Recommendation from friend/colleague	0%	2
Ratings / User reviews / Awards	0%	1
		1,929

THE MOST IMPORTANT FACTOR – BY ISP – THOSE PLANNING TO SWITCH

(minimum 60 users intending to switch)

SKY BROADBAND USERS ARE MOST FRUSTRATED BY DOWNLOAD SPEED (49%)

BE/O2 USERS ARE LIKELY TO SWITCH BECAUSE OF THE LACK OF FASTER/FIBRE OPTIC BROADBAND (73-80% CITING ONE OF THESE AS PRIMARY REASON)

42% OF ORANGE CUSTOMERS LOOKING ELSEWHERE ARE CONCERNED BY DOWNLOAD SPEED AND QUALITY/RELIABILITY

42% OF VIRGIN MEDIA CUSTOMERS PLANNING TO SWITCH ARE DOING SO DUE TO QUALITY & RELIABILITY ISSUES

24% OF PLUSNET USERS SWITCHED DUE TO DOWNLOAD ALLOWANCES / FAIR USAGE POLICIES

Provider	Download Speed	Price	Quality & Reliability	Lack of fibre broadband	Customer Service	Download allowance / FUP	Other	Upload Speed	End of contract	I can't really say	Additional services	Recommendation	Ratings / Reviews / Awards	n
BT	34%	27%	11%	4%	9%	7%	4%	1%	2%	1%	0%	0%	0%	350
TalkTalk (Tiscali)	34%	14%	22%	2%	15%	2%	3%	1%	1%	2%	1%	1%	0%	285
Virgin Media	12%	24%	42%	0%	7%	6%	4%	2%	1%	1%	1%	0%	0%	273
Sky	49%	14%	10%	10%	4%	2%	6%	4%	1%	1%	1%	0%	0%	197
O2	40%	13%	6%	33%	3%	2%	2%	1%	1%	1%	0%	0%	0%	188
Orange (Wanadoo, Freeserve)	42%	12%	22%	10%	6%	1%	5%	0%	2%	0%	1%	0%	0%	104
PlusNet	27%	19%	15%	3%	5%	24%	5%	0%	0%	0%	1%	0%	0%	98
BE	25%	2%	11%	52%	1%	1%	4%	4%	0%	0%	0%	0%	0%	97

WHEN DO USERS SWITCH? – THOSE WHO HAVE SWITCHED

OF THE 7,702 USERS WHO SWITCHED PROVIDERS, AROUND A THIRD (34%) HAD BEEN WITH THEIR PROVIDER 1-2 YEARS, AND A THIRD (32%) 2-4 YEARS WITH 24% HAVING BEEN WITH A PROVIDER FOR 4 YEARS OR LONGER. 8% SWITCHED IN LESS THAN ONE YEAR.

How long did you stay with your previous supplier before moving…	%	n
1-2 years	34%	2,627
2-4 years	32%	2,429
Over 4 years	24%	1,851
Less than a year	8%	610
Not sure	2%	185
Total	**100%**	**7,702**

WHY DID YOU SWITCH – THOSE WHO HAVE SWITCHED

Why did you switch providers?	%	n
Download speeds	44%	3,405
Price	43%	3,337
Customer service	32%	2,462
Quality & reliability of the broadband connection	30%	2,330
Download allowance / fair usage policy	23%	1,746
Upload speeds	17%	1,331
Other[9]	17%	1,311
Moved house	15%	1,161
To get fibre broadband services (FTTP/FTTC)	11%	886
Ratings / user reviews / awards	8%	610
Contract / terms & conditions	6%	496
Recommendation from friend/colleague	5%	358
IP Addressing (e.g. static IP/block)	2%	167
Additional services (web hosting, etc.)	2%	161
	Total Switchers =	**7,753**

[9] Many people in the 'other' category cited changes relating to their broadband provider being acquired by another company or lack of suitable products from current provider/moving house.

WHAT WAS THE MOST IMPORTANT REASON FOR SWITCHING – THOSE WHO HAVE SWITCHED

PRICE AND DOWNLOAD SPEED REMAIN THE MOST IMPORTANT FACTORS FOR THOSE WHO HAVE SWITCHED BUT QUALITY/RELIABILITY AND CUSTOMER SERVICE ARE ALSO SIGNIFICANT FACTORS.

Of the above reasons, what was the most important factor in your decision to switch?	%	n
Price	21%	1,612
Download Speed	20%	1,524
Quality & Reliability of the broadband connection	13%	1,003
Customer Service	11%	833
Other	9%	679
Moved house	8%	628
Download allowance / fair usage policy	7%	533
I can't really say	3%	258
My current provider doesn't offer fibre broadband	3%	243
Contract / terms & conditions	1%	102
Ratings / User reviews / Awards	1%	68
Upload Speed	1%	66
Additional services (web hosting, etc.)	1%	64
Recommendation from friend/colleague	1%	51
Total	**100%**	**7,664**

EASE OF SWITCHING

WE ASKED USERS HOW EASY IT WAS TO SWITCH PROVIDERS; OFCOM HAS BEEN CONSIDERING CHANGES IN THE PROCESS TO MAKE IT EASIER. DESPITE THIS, ALMOST 9 IN 10 USERS (89%) SAID IT WAS RELATIVELY EASY OR VERY EASY TO SWITCH PROVIDERS, WITH MOST OF THOSE FINDING IT 'VERY EASY'. ONLY 9% OF USERS FOUND IT RELATIVELY OR VERY DIFFICULT.

How easy was it to switch providers?	%	n
Unsure / Not Applicable	3%	235
Very easy	53%	4,073
Relatively easy	36%	2,787
Relatively difficult	6%	435
Very Difficult	3%	227
Total	**100%**	**7,757**

USE OF MAC CODES

WERE YOU GIVEN A 'MIGRATION AUTHORISATION CODE' (MAC) TO FACILITATE THE SWITCH?

MOST BROADBAND MIGRATIONS (57%) HAPPEN THROUGH THE MAC PROCESS

Were you given a 'migration authorisation code' (MAC) to facilitate the switch?	%	n
I can't remember / Not applicable	19%	1,459
I'm not sure - What is a MAC?	1%	44
No - I couldn't get my provider to issue me a MAC	3%	264
No - I was migrating between technologies where a MAC code isn't used (e.g. between ADSL/cable/mobile broadband)	21%	1,599
Yes - I migrated using a MAC	57%	4,414
Total	**100%**	**7,780**

RELATIONSHIP BETWEEN EASE OF MIGRATION AND USING MAC

USERS WHO MIGRATED WITHOUT A MAC CODE (TYPICALLY THOSE WITH CERTAIN COMBINATIONS OF FULL LLU SERVICES SUCH AS THOSE USED BY SKY AND TALKTALK) FOUND IT MORE DIFFICULT TO MIGRATE WITH 48% SAYING IT WAS RELATIVELY OR VERY DIFFICULT.

Provided MAC?	Unsure / n/a	Very easy	Relatively easy	Relatively difficult	Very Difficult	n
I can't remember / Not applicable	13%	47%	33%	5%	2%	1,456
I'm not sure - What is a MAC?	2%	39%	43%	14%	2%	44
No - I couldn't get my provider to issue me a MAC	1%	25%	27%	**24%**	**24%**	261
No - I was migrating between technologies where a MAC code isn't used (e.g. between ADSL/cable/mobile broadband)	3%	61%	29%	4%	3%	1,592
Yes - I migrated using a MAC	0%	53%	40%	5%	2%	4,404
Total	**3%**	**53%**	**36%**	**6%**	**3%**	**7,757**

ISP-PROVIDED E-MAIL ADDRESSES

36% use ISP-provided e-mail addresses which make it more difficult for them to switch providers in the future. Surprisingly, 25% have their own domain/e-mail service; 38% use a webmail service such as Gmail.

Do you use an e-mail address provided by your ISP?	%	n
I'm not sure / other	2%	178
No - I have my own domain/e-mail service	25%	2,647
No - I use a webmail service	38%	4,083
Yes - I use an ISP-provided e-mail address	36%	3,861
Total	**100%**	**10,769**

OF THOSE WITH ISP-PROVIDED E-MAIL ADDRESSES, WE ASKED HOW MUCH OF A DETERRENT THIS WOULD BE TO SWITCHING. 23% OF THOSE (**8% OF TOTAL RESPONDENTS**) WOULD FIND THAT A 'SIGNIFICANT DETERRENT).

You stated that you use an "ISP-provided" e-mail address (e.g. xxxxxx@btinternet.co.uk), which means you might need to change your e-mail address if you switch providers. How much of a deterrent would it be to switching broadband providers, if you had to change your e-mail address?	%
I could easily change my ISP-provided e-mail address	35%
It would be a factor I would need to consider	38%
It's a significant deterrent to switching	23%
Not sure / not applicable	4%

Sample = 3,842

USAGE ALLOWANCE / FAIR USAGE POLICIES

HOW MUCH OF YOUR MONTHLY DATA QUOTA DO YOU TEND TO USE?

MOST USERS DON'T HAVE A MONTHLY QUOTA; THOSE THAT DO, GENERALLY MANAGE THEIR USAGE WELL.

How much of your monthly data quota do you tend to use?	%	n
It varies from month to month	6%	697
I don't have a limit on my connection	51%	5,461
I don't know what my data quota/usage is	9%	994
Hardly any of it	6%	623
Some, perhaps about half	14%	1,488
Most of it	12%	1,339
I frequently exceed it	2%	206
Total	**100%**	**10,808**

DO YOU HAVE A MONTHLY USAGE ALLOWANCE?

If you have a monthly usage allowance, what is it?	%	n
I'm not sure if I have quote	6%	538
I can't remember my quota	6%	532
I don't have a quota	43%	3,578
up to 2 GB	1%	94
up to 5 GB	2%	143
up to 10 GB	10%	823
up to 30 GB	5%	390
up to 20 GB	5%	384
up to 50 GB	12%	974
up to 75 GB	3%	245
up to 100 GB	4%	292
more than 100 GB	4%	333
Total	**100%**	**8,326**

REASONS FOR HAVING BROADBAND

WHY DO YOU HAVE BROADBAND AT HOME?

USERS HAVE BROADBAND FOR MANY REASONS. MOST WANT AN 'ALWAYS ON' CONNECTION WITH FASTER WEB SURFING AND DOWNLOADING AND AN INCREASING NUMBER ARE WATCHING STREAMED CONTENT. THE 'ALWAYS ON' NATURE IS MORE IMPORTANT TO CONSUMERS THAN SPEED.

SOCIAL MEDIA & STREAMING VIDEO ARE POPULAR, BUT ARE **NOT SEEN AS THE MOST IMPORTANT USE**. 'RUNNING A SERVER' INDICATES A 'TECHIE' SLANT TO RESPONDENTS.

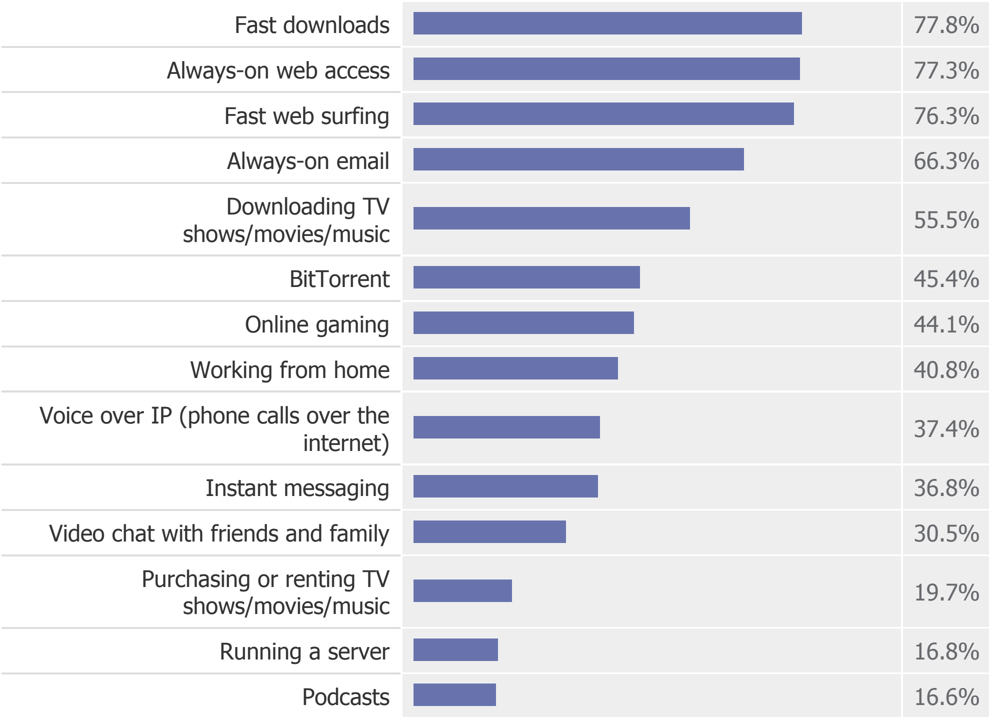
BROADLY SIMILAR RESULTS WHEN COMPARED TO AUSTRALIAN BROADBAND SURVEY A YEAR EARLIER

Why do you have broadband at home? (tick all that apply)	%	n
Always-on web access	82%	8,956
Always-on email	78%	8,507
Fast web surfing	77%	8,413
Fast downloads	74%	8,024
Watching streamed video (e.g. iPlayer, 4oD, Netflix, YouTube etc)	57%	6,203
Working from home	45%	4,890
Downloading TV shows/movies/music	43%	4,691
Social Media (e.g. facebook)	43%	4,689
Voice over IP (phone calls over the internet) (e.g. Skype)	37%	3,978
Video chat with friends and family (e.g. Skype)	34%	3,725
Instant messaging (e.g. MSN Messenger)	26%	2,865
Online gaming	25%	2,729
Purchasing or renting TV shows/movies/music	19%	2,089
P2P Downloads (e.g. BitTorrent)	16%	1,763
Podcasts	13%	1,372
Running a server	11%	1,168
Other (please specify)	8%	863
Total	**100%**	**10,896**

AS COMPARED TO AN AUSTRALIAN BROADBAND SURVEY IN 2011:

Why do you have broadband? From this list, pick what is important to you.

(source: Australian Broadband Survey 2011 - http://whirlpool.net.au/survey/2010/)



OF THESE, WHICH IS THE MOST IMPORTANT?

Which of these is the most important to you?	%	n
Always-on web access	31%	3,319
Fast downloads	24%	2,592
Fast web surfing	12%	1,322
Working from home	7%	803
Always-on email	7%	738
Online gaming	4%	472
Not sure	4%	441
Watching streamed video (e.g. iPlayer, 4oD, Netflix, YouTube etc)	3%	290
Other	2%	189
Video chat with friends and family (e.g. Skype)	1%	125
Downloading TV shows/movies/music	1%	115
Social Media (e.g. Facebook)	1%	81
Voice over IP (phone calls over the internet) (e.g. Skype)	1%	76
Running a server	1%	74
P2P Downloads (e.g. BitTorrent)	0%	51
Instant messaging (e.g. MSN Messenger)	0%	15
Purchasing or renting TV shows/movies/music	0%	9
Podcasts	0%	8
Total	**100%**	**10,720**

INTERNET-CONNECTED EQUIPMENT IN THE HOME

84% OF USERS HAVE COMPUTER (DESKTOP/LAPTOP) CONNECTED. 38% USE A TABLET DEVICE, 35% GAMES CONSOLE AND 27% INTERNET TV DEVICE. VOIP PHONES USED BY 12% OF USERS.

Internet-connected devices at home	%	n
Laptop PC	84%	9,168
Desktop PC	84%	9,156
Mobile phone (e.g. iPhone)	65%	7,119
Tablet device (e.g. iPad, Galaxy Touch)	38%	4,159
Games console (e.g. Xbox 360, PS3, Wii)	35%	3,843
Internet TV device (e.g. Apple TV)	27%	2,971
VoIP Phone	12%	1,254
Other (please specify)	5%	582
Security device (e.g. CCTV cameras)	5%	501
Home automation	2%	197
Total	**100%**	**10,896**

USE OF BROADBAND CONNECTIONS

NUMBER OF PEOPLE USING BROADBAND IN THE HOUSEHOLD

In a normal week, how many people use your broadband connection?

Users	%	n
1	22%	2,392
2	45%	4,843
3	16%	1,700
4	11%	1,229
5+	6%	600
Total	**100%**	**10,764**

HOW MANY 'COMPUTER' DEVICES IN THE HOUSEHOLD? (I.E. DESKTOPS/LAPTOPS)

	Values	
Desktops / Laptops	**%**	**n**
1	12%	1,328
2	28%	3,073
3	23%	2,507
4	14%	1,460
5	8%	860
6	4%	434
7+	11%	1,135
Total	**100%**	**10,797**

DO YOU SHARE YOUR BROADBAND CONNECTION ACROSS MULTIPLE DEVICES?

MOST PEOPLE (62%) WHO CONNECT MORE THAN ONE DEVICE TO THEIR BROADBAND USE A MIX OF WIRED AND WIRELESS CONNECTIONS, ALTHOUGH 24% USE EXCLUSIVELY WIRELESS.

Multiple devices?	%	n
No - Just one device connected	9%	960
Yes - They all connect using an Ethernet cable	5%	543
Yes - They all connect using Wireless	24%	2,577
Yes - They connect using a mixture of Ethernet cable and wireless	62%	6,651
Total	**100%**	**10,731**

WIRELESS NETWORK SECURITY

74% OF USERS USE THE RECOMMENDED WPA/WPA2 ENCRYPTION ON THEIR WIRELESS AND 5% OF USERS DO NOT USE WIRELESS, LEAVING 21% OF USERS WITH A POTENTIALLY INSECURE BROADBAND CONNECTION ALLOWING THIRD PARTIES TO USE IT WITHOUT PERMISSION.

8% OF USERS TURN THEIR ROUTER OFF WHEN IT'S NOT IN USE, WHICH CAN ALSO CAUSE SLOWER SPEEDS ON SOME NETWORKS DUE TO THE SYSTEM THINKING THE LINE IS UNSTABLE.

OF THOSE WHO WORK IN THE IT INDUSTRY (OR IN IT FUNCTIONS) USING WIRELESS CONNECTIVITY, 91% USE WPA/WPA2 ENCRYPTION AS COMPARED TO 71% OF THOSE WHO WORK OUTSIDE IT.

Wireless Network Security	%	n
I don't have a wireless network	5%	501
I'm not sure	6%	699
I turn the router off when I'm not using it	8%	818
I use MAC address filtering	12%	1,287
Using WEP encryption	13%	1,412
Using WPA/WPA2 encryption	74%	8,032
Total	**100%**	**10,896**

	No - I don't work in IT	Yes - I work in IT
Using WPA/WPA2 encryption	67%	89%
Using wireless	94%	98%
Wireless users on WPA/WPA2 encryption	71%	91%

CRITICAL ENTERTAINMENT SERVICES

ALMOST HALF THE RESPONDENTS WOULD GIVE UP THEIR TELEVISION RATHER THAN BROADBAND AND A THIRD WOULD DISPOSE OF THEIR MOBILE PHONE FIRST. ONLY 2% WOULD GIVE UP THEIR BROADBAND CONNECTION AGAINST OTHER OPTIONS.

If you had to give up one of these, which one would it be?	**%**	**n**
Broadband	2%	195
Not sure	19%	2,048
Mobile phone	30%	3,190
Satellite/cable/digital TV	49%	5,308
Total	**100%**	**10,741**

TO WHAT EXTENT DO YOU THINK THE INTERNET IS AN IMPORTANT PART OF YOUR SOCIAL LIFE?

46% OF USERS THINK THE INTERNET IS A 'VERY IMPORTANT' PART OF THEIR SOCIAL LIFE; 86% THINK IT'S VERY OR SOMEWHAT IMPORTANT.

To what extent do you think the Internet is an important part of your social life?	**%**	**n**
Very important	46%	4,981
Somewhat important	40%	4,250
Not at all	13%	1,437
Not sure	1%	73
Total	**100%**	**10,741**

IMPORTANCE OF INTERNET BY AGE

YOUNGER RESPONDENTS WERE MORE LIKELY TO RATE THE INTERNET A 'VERY IMPORTANT' PART OF THEIR SOCIAL LIFE.

To what extent do you think the Internet is an important part of your social life?[10]

	18 - 24	25 - 34	35 - 49	50 - 64	Over 65
Very important	65%	59%	48%	44%	41%
Somewhat important	29%	31%	38%	39%	46%
Not at all	6%	9%	13%	16%	13%
Not sure	0%	1%	1%	1%	1%

Sample = 10,713

HOW MANY HOURS EACH DAY DO YOU USE THE INTERNET?

How many hours each day do you spend using the Internet?	%	n
not sure	0%	47
less than an hour	2%	212
1-2 hours	21%	2,218
2-4 hours	35%	3,716
4-6 hours	19%	2,035
more than 6 hours	23%	2,495
Total	**100%**	**10,723**

[10] This statistic is likely to be biased by the selection of users taking part in an online survey.

HOURS ONLINE BY AGE

THE YOUNGER YEAR GROUPS SPEND FAR MORE TIME ONLINE THAN OLDER SURFERS

MORE THAN HALF OF 18-24 YEAR OLDS SPEND MORE THAN 6 HOURS ONLINE EVERY DAY, AND 80% SPEND MORE THAN 4 HOURS ONLINE.

How many hours each day do you spend using the Internet?	18 - 24	25 - 34	35 - 49	50 - 64	Over 65
less than an hour	0%	1%	1%	2%	3%
1-2 hours	2%	9%	17%	22%	30%
2-4 hours	18%	25%	32%	36%	42%
4-6 hours	24%	23%	20%	20%	16%
more than 6 hours	56%	42%	30%	20%	10%

Sample = 10,649 (excludes those who did not provide age or know how much time they spent online)

TIME OF INTERNET USE

We asked respondents when they used the Internet, regardless of whether it was at home, work or on the move.

Time of Internet use	%
00:00 to 06:00	18%
06:00 to 09:00	47%
09:00 to 12:00	76%
12:00 to 18:00	79%
18:00 to 00:00	89%

Sample = 10,841

BROADBAND HARDWARE

WHERE DO YOU GET YOUR BROADBAND ROUTER?

TWO THIRDS OF BROADBAND USERS GET THEIR ROUTER FROM THEIR BROADBAND PROVIDER. AROUND A THIRD BUY THEIR OWN.

Where did you get your broadband router?	%
My broadband provider supplied it	66%
I purchased it online (brand new)	19%
I purchase it from a retail store	10%
I purchased it online (second hand)	2%
Other	1%
A friend gave it to me	1%
Not sure	0%

Sample = 10,803

EASE OF SETUP

17% OF ROUTERS CAME PRE-CONFIGURED; 79% WERE 'VERY/RELATIVELY EASY' TO SET UP AND ONLY 5% WERE MORE DIFFICULT

Ease of Setup	%	n
It came pre-configured / it was installed for me	17%	1,799
Very easy	55%	5,920
Relatively easy	24%	2,534
Took some time	4%	397
Very difficult	1%	65
Not sure	0%	49
Total		**10,764**

ROUTER COST

50% OF USERS PAID EXTRA FOR THEIR ROUTER; 50% WERE OFFERED AND TOOK ADVANTAGE OF A FREE ROUTER

60% PAID LESS THAN £5;

67% PAID LESS THAN £20

82% PAID LESS THAN £40

9% PAID OVER £120[11]

Router Cost (if paid)	%	n
Under £5	10%	529
£5 to £10	3%	142
£10 to £20	4%	208
£20 to £40	15%	827
£40 to £80	21%	1,153
£80 to £120	14%	754
£120 to £150	5%	266
Over £150	4%	216
Not sure / I don't know	26%	1,405
Total	**100%**	**5,500**

FAULTS

IN THE LAST THREE YEARS HAVE YOU REPORTED A FAULT TO YOUR BROADBAND PROVIDER?

In the last three years have you reported a fault to your broadband provider?	%	n
Can't remember / Not sure	4%	77
No	23%	446
Yes	73%	1,435
Total	**100%**	**1,958**

[11] This figure is likely to be significantly affected by the technical bias in the survey respondents.

OF THOSE WHO REPORTED FAULTS..

HOW LONG DID IT TAKE TO FIX?

FAULTS STILL TAKE QUITE SOME TIME TO REPLACE. 52% OF PROBLEMS REPORTED WERE ON-GOING OR TOOK LONGER THAN A WEEK TO FIX.

Once the fault was reported how long did it take to fix?	%	n
Fixed in a couple of hours	14%	196
The next day	13%	191
Two to three days	20%	278
Three to seven days	13%	191
Longer than a week	19%	273
Fault is still on-going	20%	290
Total	**100%**	**1,419**

DID GETTING THE FAULT FIXED COST YOU ANYTHING?

ALMOST ALL BROADBAND PROBLEMS WERE FIXED WITHOUT CHARGES TO THE CONSUMER; WHERE A CHARGE WAS

Did getting the fault fixed cost you anything?	%	n
Free	95%	1,267
up to £30	2%	30
£30 to £60	1%	16
£60 to £100	1%	10
£100 to £130	0%	2
£130 to £170	1%	7
More than £170	1%	7
Total	**100%**	**1,339**

SUPERFAST BROADBAND

IS SUPERFAST BROADBAND (25MBPS+) AVAILABLE IN YOUR AREA?

Is superfast broadband (25 Mbps or faster) already available in your area?	%	n
No	45%	4,928
Yes	42%	4,606
Not sure	12%	1,312
Total	**100%**	**10,846**

CURRENT SUPERFAST BROADBAND SUBSCRIBERS

Are you subscribed to what is considered a superfast service already?	%	n
No	74%	8,047
Yes	26%	2,799
Total	**100%**	**10,846**

EXPECTATIONS OF THOSE NOT CURRENTLY COVERED BY SUPER-FAST BROADBAND

45% OF THOSE WITHOUT ACCESS TO SUPERFAST BROADBAND ARE NOT CONVINCED THEY WILL EVER HAVE ACCESS TO IT.

When are you expecting superfast broadband to be available in your area?	%	n
I don't know	23%	1,146
2012/2013	28%	1,393
2014	4%	189
2015	4%	179
2016	1%	46
2017	0%	8
2018	0%	12
2020	1%	27
No expectation that it will ever arrive	45%	2,217
Total	**100%**	**4,925**

HOW MUCH WOULD YOU PAY FOR SUPERFAST?

(for those who currently do not have super-fast broadband).

MOST USERS NOT CURRENTLY ON SUPERFAST BROADBAND SERVICES WOULD NOT BE PREPARED TO PAY MUCH IF ANYTHING MORE FOR A SUPERFAST SERVICE. 88% WOULD PAY NO MORE THAN £10/MONTH; 31% WOULD PAY NO MORE THAN £5 AND 38% WOULD NOT PAY ANY MORE.

How much extra would you pay to be able to receive a superfast service over a standard broadband connection?	%	n
£0 extra per month	38%	3,043
£5 extra per month	31%	2,513
£10 extra per month	19%	1,483
£15 extra per month	5%	360
£20 extra per month	2%	195
£25 extra per month	1%	84
Whatever it costs	4%	308
	100%	**7,986**

WHAT MINIMUM CONNECTION SPEEDS SHOULD 'SUPERFAST' BE USED FOR?

DOWNLOAD SPEED

29% OF USERS BELIEVE 25MBPS DOWNLOAD SPEEDS QUALIFIES AS 'SUPER-FAST' BROADBAND. 38% BELIEVE 50MBPS IS REQUIRED AND 20% THINK IT SHOULD BE 100MBPS. TWO THIRDS WOULD THEREFORE BE HAPPY WITH A 50MBPS SERVICE.

Download speed	%	n
Not Sure	7%	811
25 Mbps	29%	3,139
50 Mbps	38%	4,090
100 Mbps	20%	2,161
200 Mbps	2%	184
500 Mbps	1%	124
1 Gbps	3%	309
Total	**100%**	**10,818**

UPLOAD SPEED

A THIRD OF USERS (32%) BELIEVE 10MBPS IS THE MINIMUM UPLOAD SPEED TO MAKE A SERVICE 'SUPER-FAST'. 71% OF USERS WOULD BE HAPPY WITH A 20MBPS SERVICE.

Upload speed	%	n
Not Sure	12%	1,290
5 Mbps	24%	2,558
10 Mbps	32%	3,457
20 Mbps	15%	1,612
50 Mbps	6%	654
100 Mbps	3%	296
Symmetric	9%	935
Total	**100%**	**10,802**

WILLINGNESS TO SWITCH PROVIDERS TO GET SUPER-FAST BROADBAND

64% OF USERS SAID THEY WOULD BE PREPARED TO SWITCH PROVIDER (23% WEREN'T SURE) IF SUPERFAST BROADBAND WAS AVAILABLE, BUT ONLY THROUGH A NEW PROVIDER. ONLY 12% WOULD STICK WITH THEIR CURRENT PROVIDER. THIS SHOULD BE A STRONG SIGNALS TO COMPANIES LIKE O2 ABOUT POTENTIAL FUTURE LOSSES IN CUSTOMERS.

Would you switch provider to get superfast broadband?	%	n
No	12%	993
Not sure	23%	1,858
Yes	64%	5,141
Total	**100%**	**7,992**

AFFORDABILITY

14% OF USERS STRUGGLE TO PAY FOR THEIR BROADBAND CONNECTIONS FROM HOUSEHOLD BUDGETS

PREVIOUS SURVEY IN AUSTRALIA INDICATED SOMEWHAT TOUGHER CLIMATE IN 2011

How easily can you budget for an internet connection?	%	n	Australia[12]
Very easily - "I wouldn't give a moment's thought to it"	20%	2,132	16%
Easily - "I have the service I want, price not a big concern"	28%	3,078	23%
Moderate - "Internet fees generally aren't an issue"	38%	4,171	39%
Borderline - "There's room in the budget, but only just"	13%	1,384	18%
Difficult - "I have difficulty finding the money each month"	1%	110	3%
Total	**100%**	**10,875**	

THOSE WHO WORK IN THE IT INDUSTRY ARE ABLE TO BUDGET MUCH EASIER FOR THEIR BROADBAND CONNECTION WITH OVER 92% NOT HAVING DIFFICULTY IN FINDING THE MONEY.

How easily can you budget for an internet connection?	Not IT	IT	n
Very easily - "I wouldn't give a moment's thought to it"	15%	30%	2,132
Easily - "I have the service I want, price not a big concern"	27%	31%	3,078
Moderate - "Internet fees generally aren't an issue"	42%	31%	4,171
Borderline - "There's room in the budget, but only just"	15%	8%	1,384
Difficult - "I have difficulty finding the money each month"	1%	0%	110
Total	**100%**	**100%**	**10,875**

[12] Australian Survey by Whirlpool.net.au in 2011 of 23,081 respondents.

PARENTAL CONTROLS

What tools or methods do you use to monitor or protect children and/or young people in the household from harmful content on the Internet? (tick all that apply)

TO PROTECT THEIR CHILDREN, MOST PARENTS DO THE MOST IMPORTANT THING – TALK TO THEM ABOUTHOW TO USE THE INTERNET SAFELY; IN THE 10-15 YEAR OLD RANGE, THIS WAS IN EXCESS OF 82%; OVER HALF THE PARENTS OF UNDER-9 YEAR OLDS ALSO BELIEVE THIS TO BE IMPORTANT

ONE OF THE MOST COMMONLY CITED ADVICCE TO PARENTS IS TO SUPERVISE THEIR CHILDREN'S USE OF THE INTERNET, SUCH AS BY PLACING COMPUTERS IN SHARED AREAS SUCH AS THE LIVING ROOM. 6 IN 10 PARENTS OF KIDS UP TO 12 YEARS OLD DO THIS RATHER THAN RELYING MAINLY ON PARENTAL CONTROL SOFTWARE.

ONLY A VERY SMALL NUMBER OF PARENTS (1-3% OF THOSE WITH CHILDREN UNDER 16) WERE NOT SURE ABOUT HOW THEIR KIDS WERE PROTECTED ONLINE.

PARENTAL CONTROL SOFTWARE WAS USED IN ALL AGE CATEGORIES BUT WAS MOST COMINANT IN THE UNDER-16 GROUPS. WHETHER THIS CAN COVER ALL THE MOBILE DEVICES OUT THERE THESE DAYS IS SOMEWHAT QUESTIONABLE, SO THE SUPERVISION AND COMMUNICATION ASPECTS REMAIN VERY IMPORTANT.

Supervision Method	Under 9	10 - 12	13 - 15	16 - 17
All use is supervised by an adult or older sibling	64%	30%	16%	8%
Computer(s) located in a shared area	61%	56%	31%	16%
Parental control features in the operating system	30%	37%	25%	15%
Parental control software installed separately	21%	30%	24%	13%
Parental control features provided by my broadband provider or on the router	16%	22%	21%	16%
I talk to the children about how to use the Internet safely	52%	83%	82%	71%
Not Sure	3%	1%	2%	5%
Number of respondents with children in each age group	**1,334**	**655**	**702**	**568**

PROVIDER VARIATIONS

THERE ARE VARIATIONS IN HOW PARENTS ACROSS VARIOUS BROADBAND PROVIDERS PROTECT THEIR CHILDREN ONLINE; OVER A QUARTER (28%) OF TALKTALK USERS USE THE NETWORK-LEVEL CONTENT FILTER;

THERE APPEARS TO BE POSSIBLE MISUNDERSTANDINGS BY PARENTS AS TO THE EXTENT OF THE PARENTAL CONTROLS OFFERED BY BROADBAND PROVIDERS ACROSS THEIR NETWORKS. TALKTALK HAS BEEN A KEY PROPONENT OF NETWORK LEVEL CONTROLS AS INDICATED BY

Broadband Provider	Supervision	Computer in shared area	ISP Parental Controls	S/w Parental Controls	Talk to kids	n
BT Broadband	43%	50%	20%	26%	68%	494
Virgin Media	47%	54%	20%	26%	68%	451
Sky Broadband	51%	54%	18%	28%	67%	317
TalkTalk Broadband (Tiscali)	42%	49%	28%	24%	66%	224
PlusNet	44%	48%	15%	19%	68%	216
O2	50%	53%	14%	23%	68%	137
BE*	43%	45%	15%	20%	65%	82
Orange* (Wanadoo, Freeserve)	46%	68%	14%	23%	75%	65
Others	43%	51%	19%	16%	70%	435
Average	**45%**	**52%**	**19%**	**23%**	**68%**	**2,421**

* Note low sample size

About thinkbroadband

thinkbroadband.com is a free consumer broadband advice website helping hundreds of thousands of users each month to address all kinds of problems and decisions with their broadband connection. It started operating in April 2000 under the name ADSLguide.org.uk and has been one of the established broadband information resources since then.

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