



Ci & CityFibre

METHODOLOGY

This piece of research uses a monadic methodology.

A monadic test is where participants are shown one product or in this case a **term** in complete isolation and asked a series of questions to measure how appealing or persuasive it is

Survey & Sample

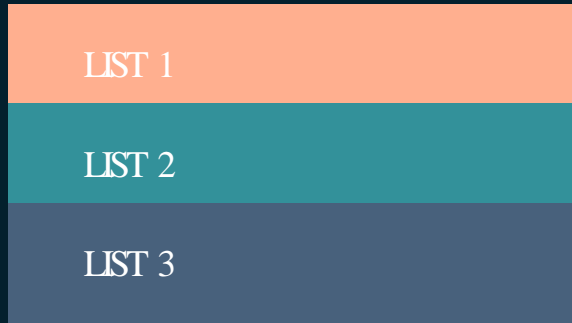
- 5 minutes
- Completed online
- Nationally representative N2100 (14 monadic cells, each cell N150)
- Nat Rep, 18+, ABC1C2DE
- Responsible for broadband decisions (Solely/ jointly / partly)

TERMS TESTED

GIGABIT-READY FULL FIBRE	PART FIBRE
GIGABIT-READY READY CABLE	ADSL
CURRENT GENERATION PART FIBRE	2 ND GENERATION FIBRE
CURRENT GENERATION CABLE	2 ND GENERATION CABLE
CURRENT GENERATION ADSL	1 ST GENERATION FIBRE
FULL FIBRE	1 ST GENERATION CABLE
CABLE	COPPER

METHODOLOGY

The terms have been derived from three set lists



Each list was displayed in order of connection speed

TERMS TESTED

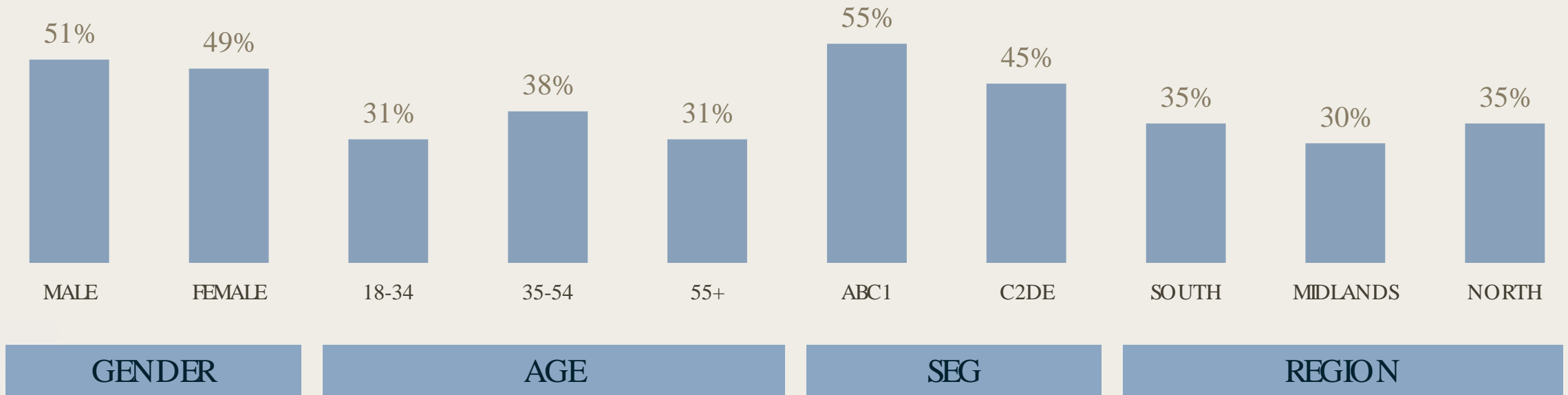
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CABLE	COPPER

WEIGHTING

All Respondents, Each Cell

Q, Age/ Gender / Seg / Region

Each monadic cell has been weighted and matched demographically to ensure moves are genuine and not due to data inconsistencies



Do consumers feel they currently have a good understanding
of the broadband infrastructure in the UK?



CONTEXT

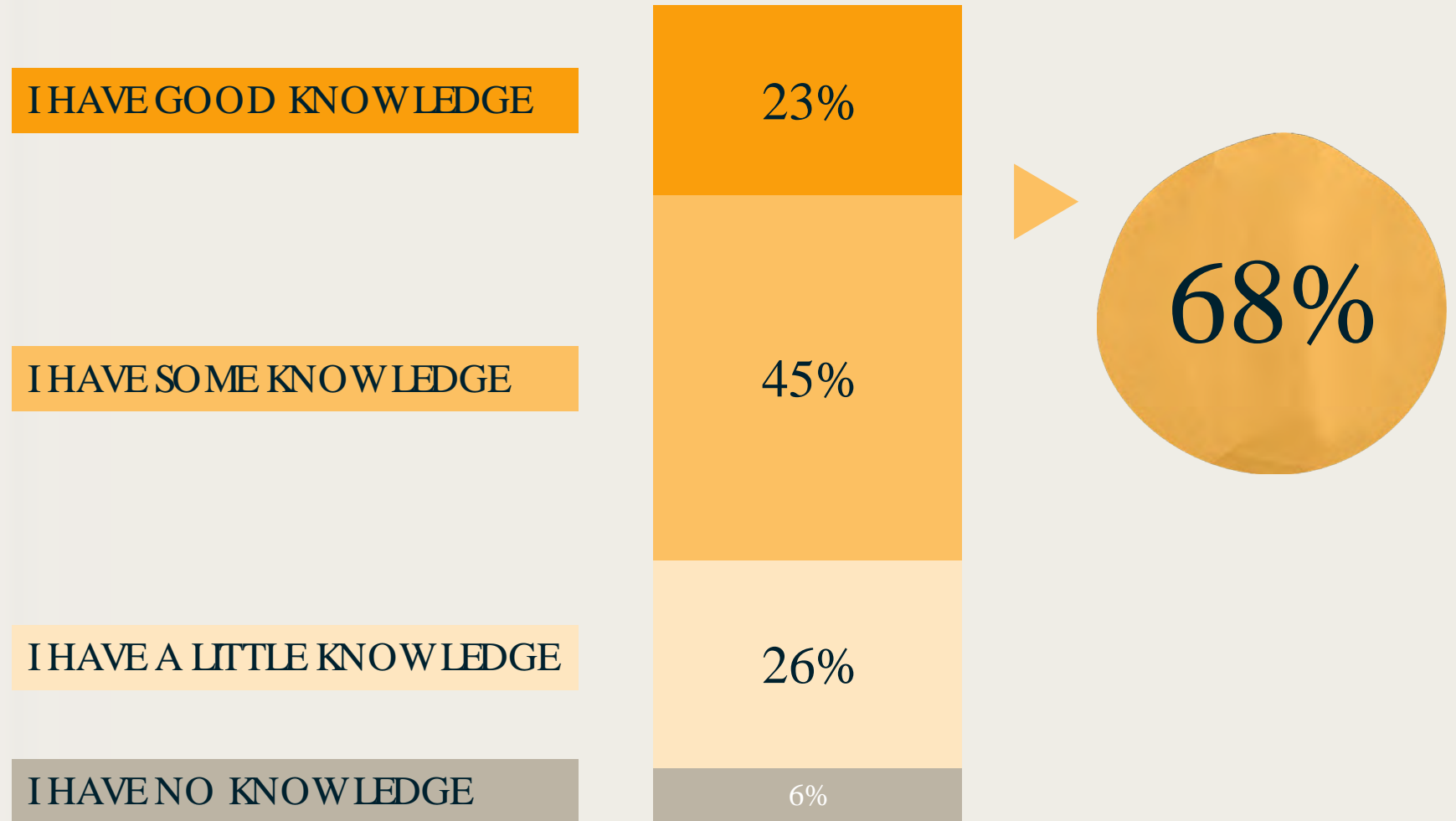
KNOWLEDGE OF UK BROADBAND INFRASTRUCTURE

All Respondents

Q. How well do you feel you understand how the broadband infrastructure in the UK works?

By this, we mean the broadband infrastructure, not necessarily the company providing your broadband package

On a total level, around 7 in 10 consumers feel they have a good grasp how the UK broadband infrastructure works



BASE: ALL RESPONDENTS (

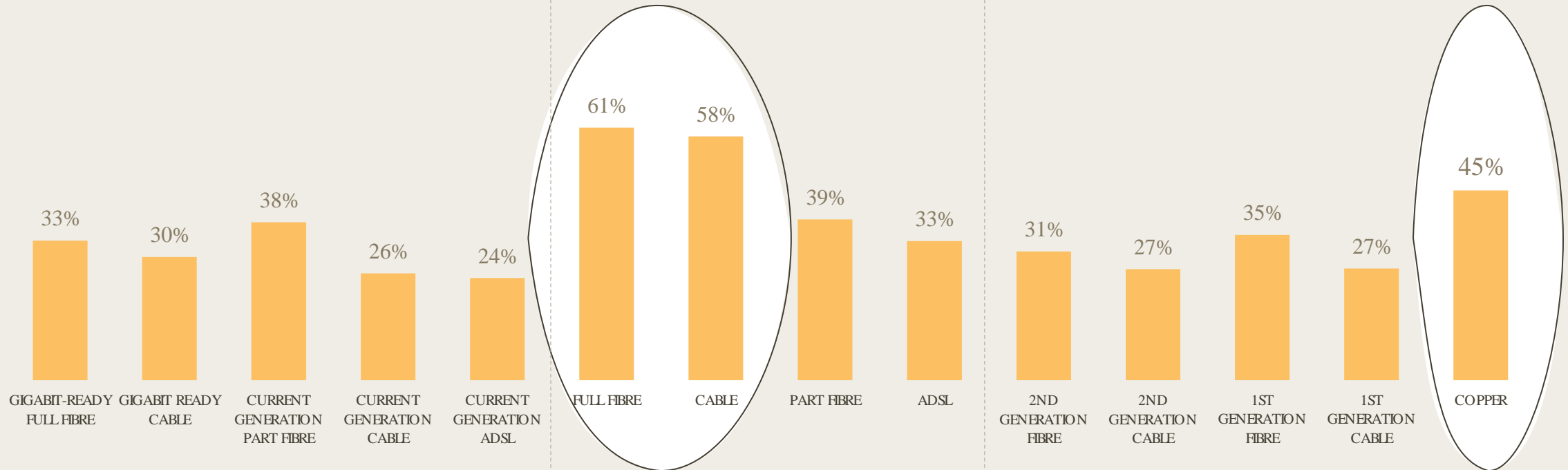
UNDERSTAND THE TERM

By Monadic Cell

Q. And to what extent do you understand the term... when it comes to broadband?

...but knowledge begins to wane when we move away from terms already in the mainstream - *full fibre, cable and copper*

COMPLETELY / PARTIAL



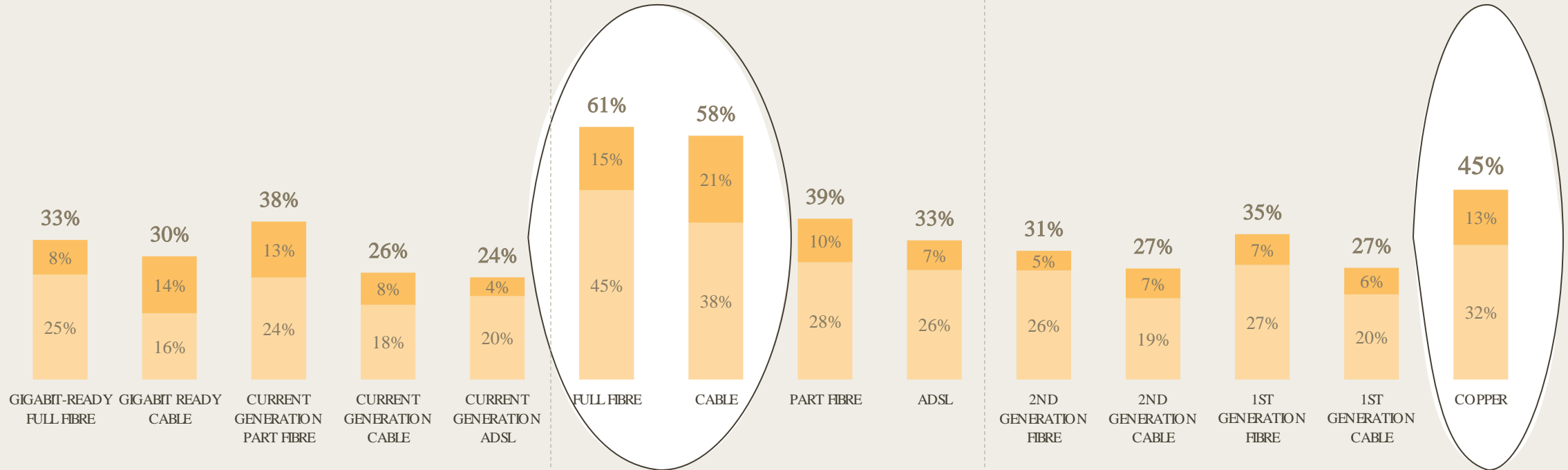
UNDERSTAND THE TERM

By Monadic Cell

Q. And to what extent do you understand the term... when it comes to broadband?

...and consumers feel this knowledge is more partial than absolute

COMPLETE PARTIAL



UNDERSTANDING OF FULL FIBRE

By Monadic Cell

Q, What do you understand by the term ... in the context of UK broadband?

FIBRE OPTIC CABLE NOT JUST TO EDGE OF PROPERTY BUT FROM HOUSE TO PROVIDER

THE CABLE FROM THE TELEPHONE EXCHANGE TO MY HOUSE IS A FIBRE CABLE. SPECS ARE MUCH FASTER THAN OLD DIAL UP CONNECTIONS.

FIBRE OPTIC CABLES FROM THE SUPPLIER ALL THE WAY TO THE USERS HOME

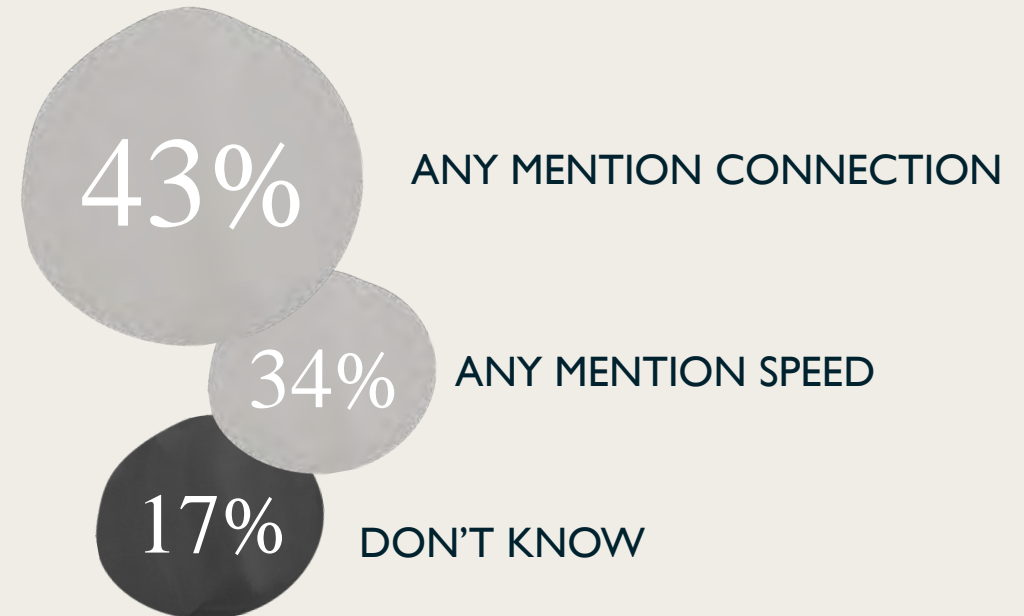
FIBRE OPTIC CABLE FROM SOURCE TO HOME, WITH NO COPPER INVOLVED

A FULL FIBRE CONNECTION TO THE PROPERTY NOT A PARTIAL ONE

...with some getting it from the get go

A FASTER CONNECTION SPEEDS FOR UPLOADS AND DOWNLOADS. I DON'T KNOW MUCH ABOUT THE ACTUAL TECHNOLOGY BEHIND IT

CODED RESPONSES



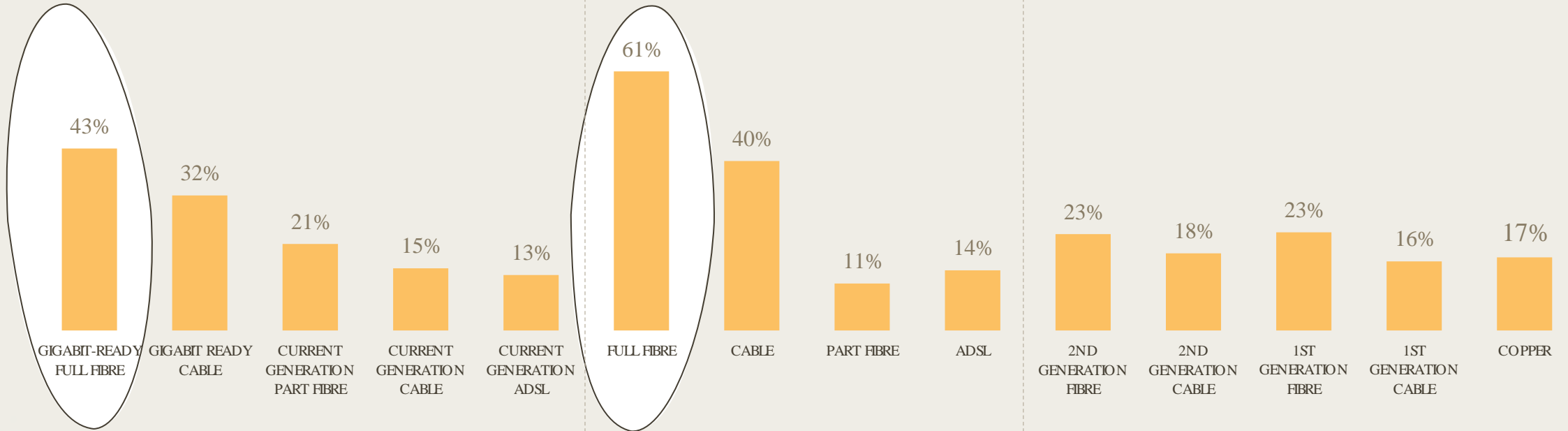
HOW GOOD TO YOU THINK

By Monadic Cell

Q. And how good overall do you think ... broadband would be?

...and when asked which would be the best, 'full fibre' terms have the strongest pull

DEFINITELY / ONE OF THE BEST (1-2)



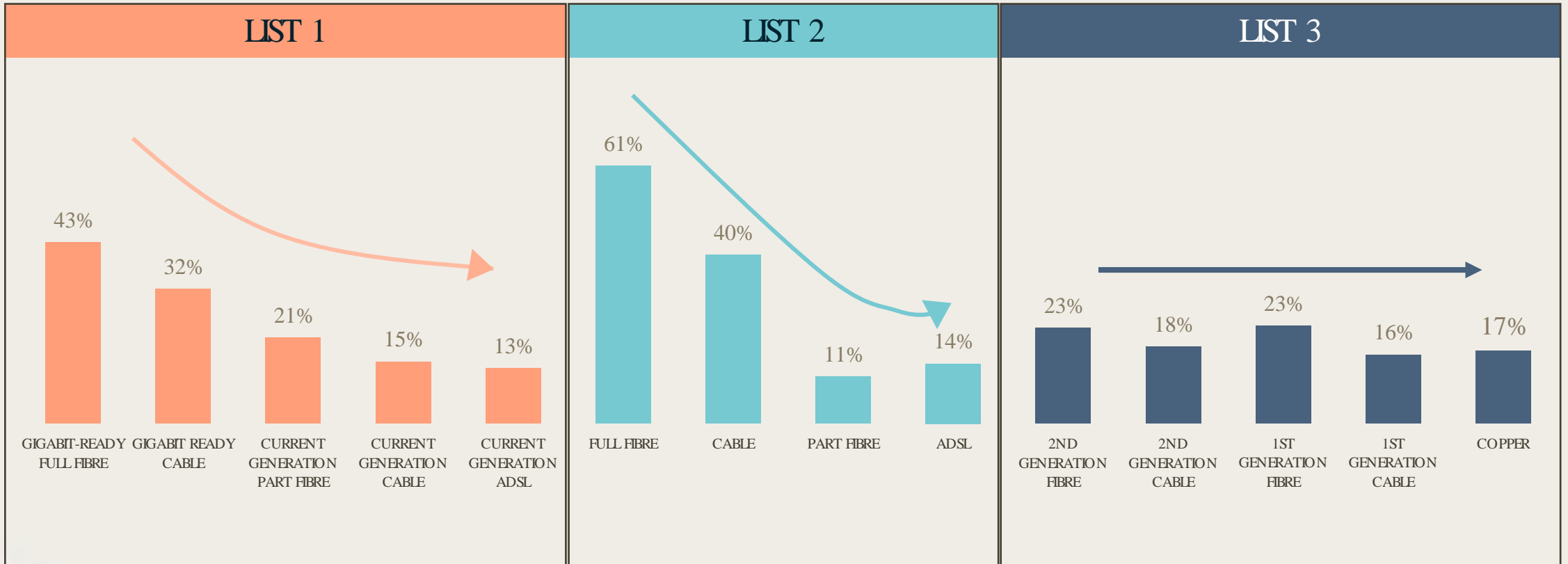
HOW GOOD TO YOU THINK

By Monadic Cell

...and even in isolation, the terms in the first two lists communicate relative position of each, whereas alternative terms need additional context to aid understanding

Q. And how good overall do you think ... broadband would be?

DEFINITELY / ONE OF THE BEST (1-2)



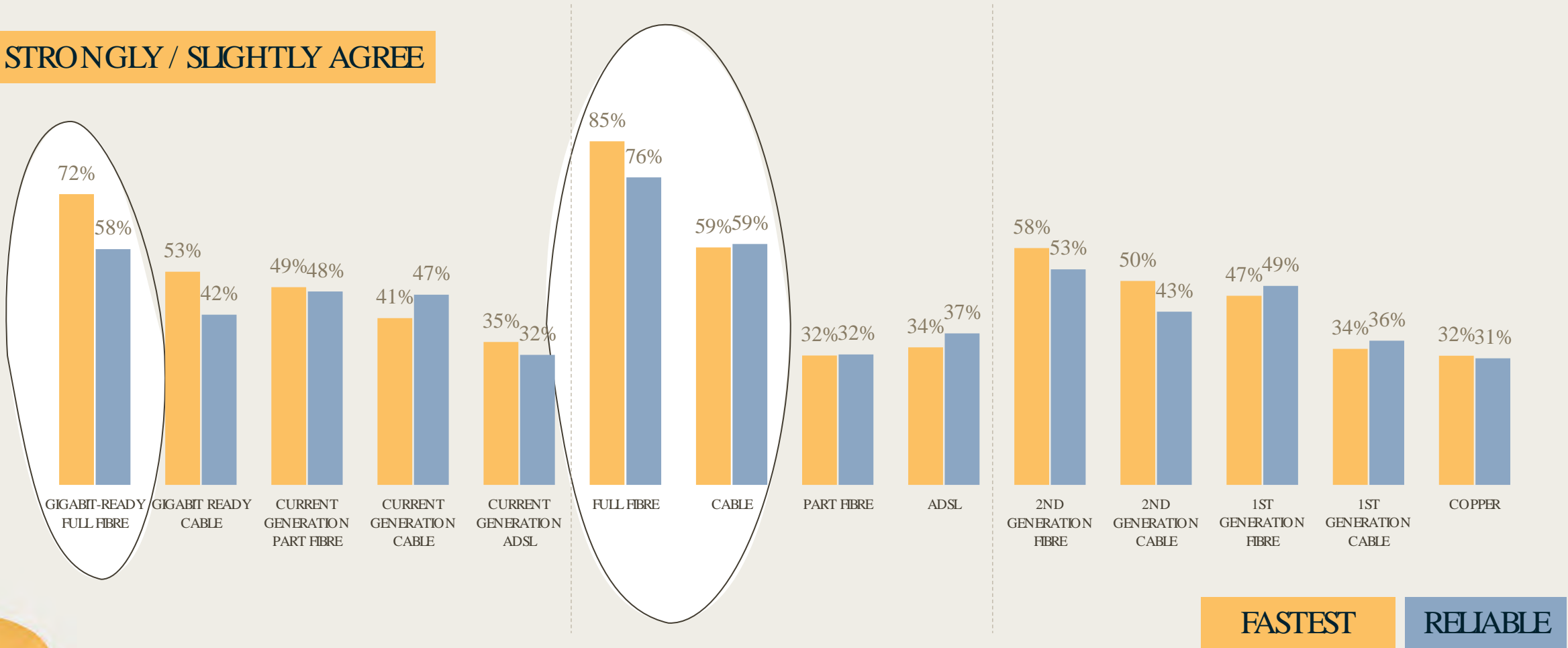
FASTEST AND RELIABLE

By Monadic Cell

..and it's clear consumers are being influenced by language used by current broadband providers when talking about speed and reliability

Q. To what extent do you agree or disagree that ... broadband will be...? - The **fastest** broadband / The most **reliable** available

STRONGLY / SLIGHTLY AGREE



FASTEST **RELIABLE**

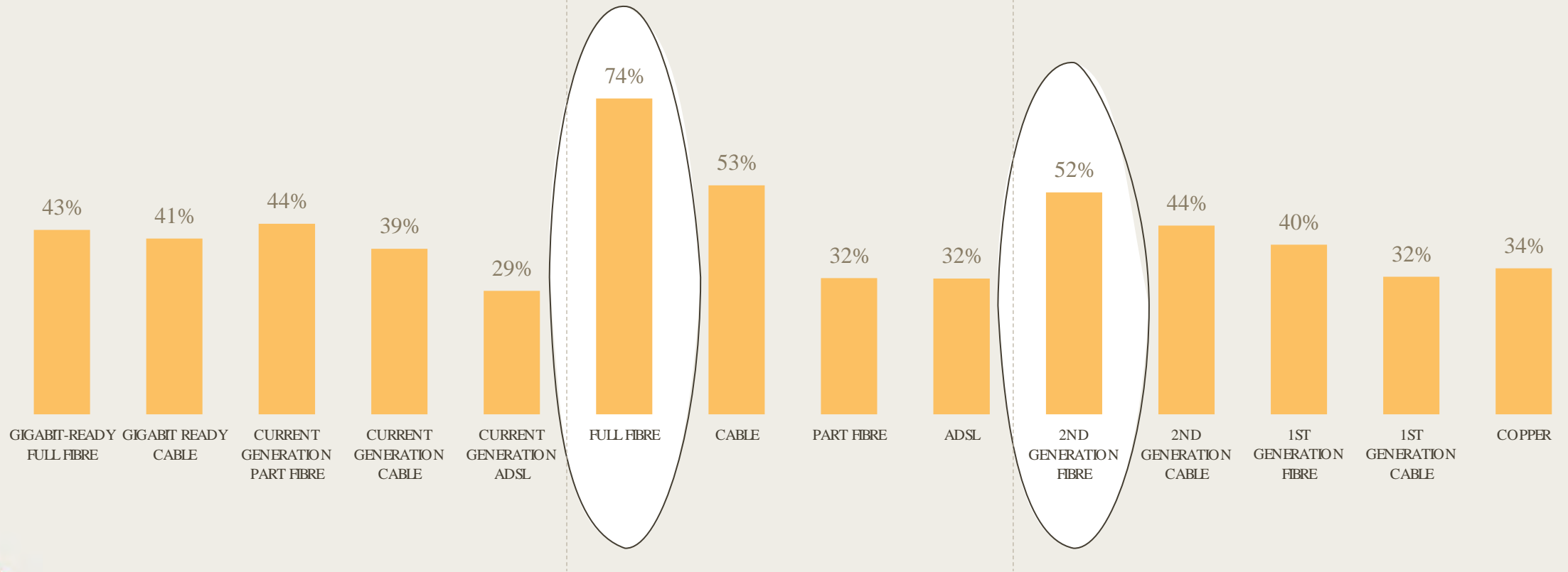
NEXT BROADBAND PACKAGE

By Monadic Cell

...and while (as expected) consumers are after 'full fibre' for their next broadband package, there's also interest in 2nd generation fibre

Q, And to what extent do you feel it is likely that your next broadband package will be ...?

VERY / SOMEWHAT LIKELY



UNDERSTANDING OF 2ND GEN FIBRE

By Monadic Cell

Q, What do you understand by the term ... in the context of UK broadband?

FIBRE IS A BETTER WAY FOR BROADBAND TO BE DELIVERED IN TO YOUR HOME (AS OPPOSED TO THE OLDER COPPER WIRES). I'M ASSUMING THAT 2ND GENERATION FIBRE IS AN UPGRADE ON THE FIBRE THAT WAS ORIGINALLY USED TO DELIVER BROADBAND.

NEW FASTER SERVICE THAT IS CURRENTLY BEING TRIALLED BUT IS NOT WIDELY AVAILABLE

IMPROVEMENT ON THE OLDER SYSTEM

NEW GENERATION OF HIGH SPEED LARGELY FIBRE OPTIC CABLES

I WOULD SAY IT IS AN UPGRADED BETTER AND FASTER VERSION OF THE 1ST GENERATION, EARLIER FIBRE USED TO FEED BROADBAND NETWORKS.

THE ORIGINAL FIBRE WAS A GRADE ABOVE COPPER DIAL UP THE SECOND GENERATION FIBRE IS BETTER SUITED TO THE FASTER REQUIREMENTS OF INTERNET SPEED AND IS BOOSTED BY SIGNAL ANTENNAS THE NEW GENERATION HAS MORE CAPACITY TO MEET TODAY'S REQUIREMENTS OF SPEED AND RELIABILITY

...with knowledge currently restricted to 'better' than the current status quo

CODED RESPONSES

55%

DON'T KNOW

20%

ANY MENTION SPEED

15%

ANY MENTION CONNECTION

FULL FIBRE AWARENESS

All Respondents

Q, Were you aware of this before today?

The vast majority were unsure of the difference between part and full fibre



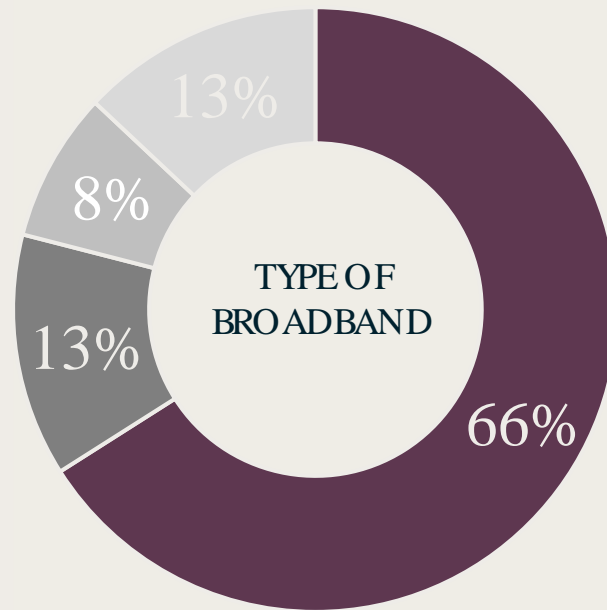
NO – not aware of the difference between full and part fibre

TYPE OF BROADBAND

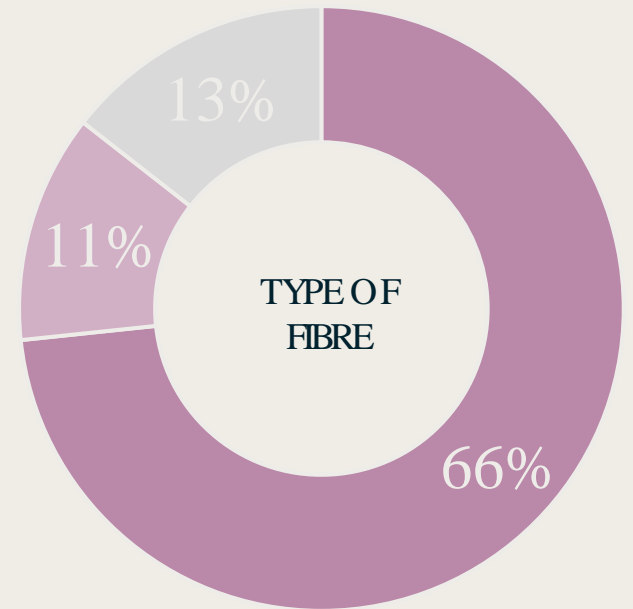
All Respondents

Q, What type of broadband do you have?

With 43% of people thinking they already have it – a clear overclaim / misunderstanding in the market



■ FIBRE ■ CABLE ■ ADSL ■ UNSURE



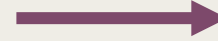
■ FULL-FIBRE ■ PART-FIBRE ■ UNSURE

...and this was due to confusing category messaging

Lots of noise



Low understanding of category



Easy to wrongly assume I might already have fibre broadband



“No that’s getting too technical, I don’t know what network we’re on”

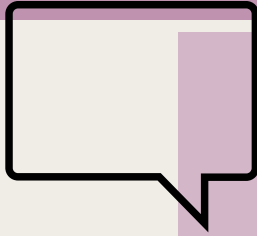
“I have to just trust them and accept it is what it is”

“The presumption for me would be we’re on BT as we have BT in here so the network and provider would be the same”

“Why are the big providers not providing that already?”

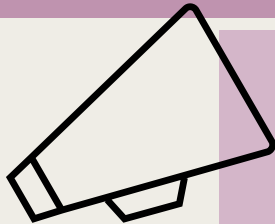
...and the lack of understanding about infrastructure

Category language is generic to both network and provider



Customers latch on to the terms they have better understanding of (e.g. speed and connectivity – although most don't fully understand that either) Wifi / Internet / Broadband are interchangeable terms for most.

Almost all claims are therefore written-off as 'jargon'



Virgin's comms around superfast and fibre have cut-through and are played back, but pessimism remains – the majority are unconvinced that it's any different to what's out there already.

Respondents were then shown a list (1 of 3) and asked (a) which were the most useful and clear (b) best at understanding the difference between the technologies

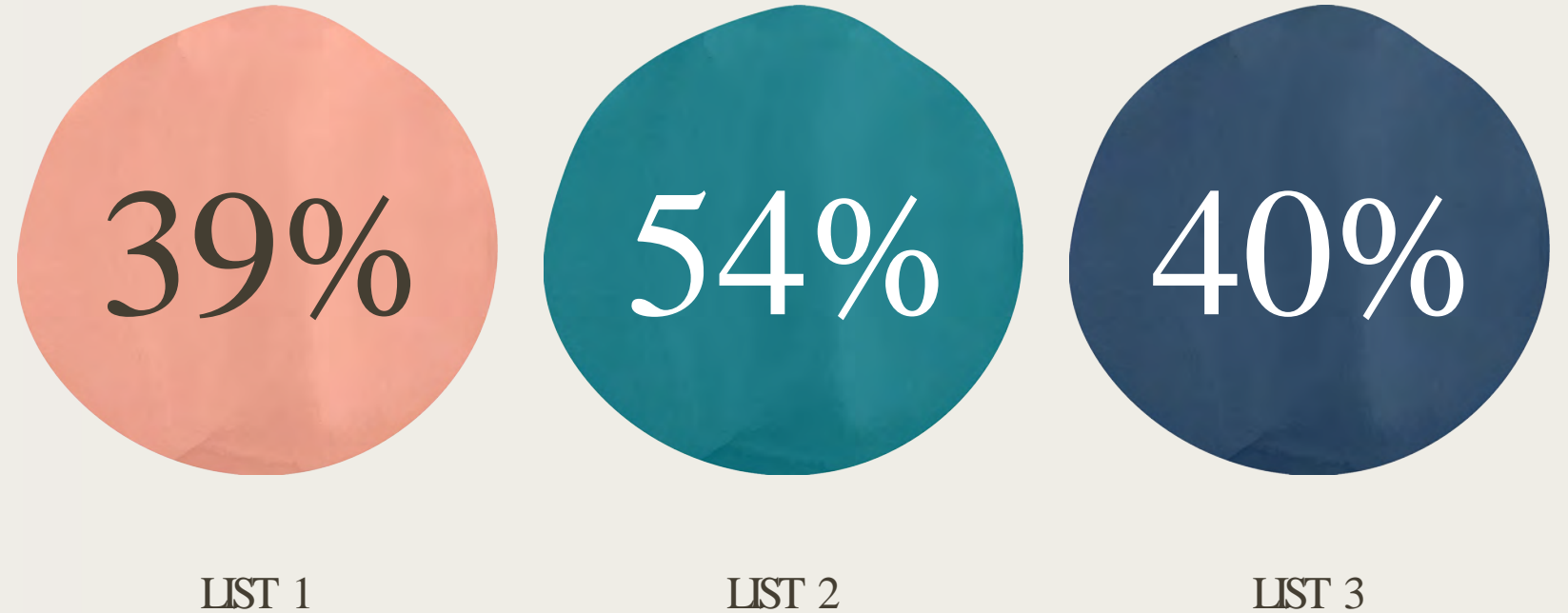
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GIGABIT-READY READY CABLE	CABLE	2 ND GENERATIONAL CABLE
CURRENT GENERATION PART FIBRE	PART FIBRE	1 ST GENERATIONAL FIBRE
CURRENT GENERATION CABLE	ADSL	1 ST GENERATIONAL CABLE
CURRENT GENERATION ADSL		COPPER

USEFUL AND CLEAR DESCRIPTIONS

By LIST (by Monadic cell)

Q. The following is a list of the broadband services currently available in the UK To what extent do you agree or disagree that they are useful and clear descriptions?

...and for many the terms were ambiguous, and when pushed, List 2 came through (but not overwhelmingly)



UNDERSTOOD THE DIFFERENCE

By LIST (by Monadic cell)

Q. And, looking at this list, to what extent do you understand the differences between these broadband types?

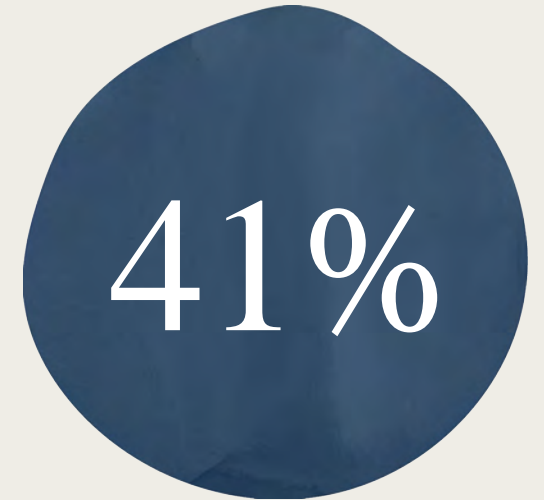
...and they weren't certain (by any stretch)
they knew the difference



LIST 1



LIST 2



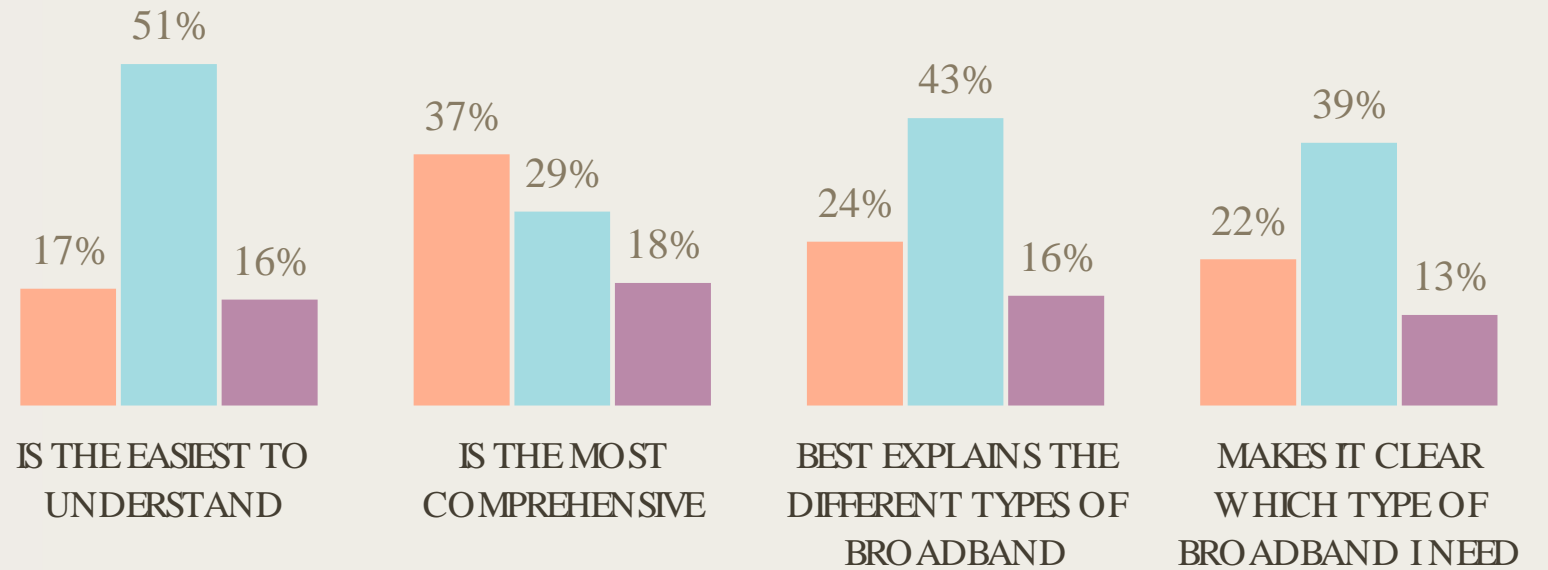
LIST 3

We then showed the respondents all the lists together
and asked about their clarity

LIST 1	LIST 2	LIST 3
GIGABIT-READY FULL FIBRE	FULL FIBRE	2 ND GENERATIONAL FIBRE
GIGABIT-READY READY CABLE	CABLE	2 ND GENERATIONAL CABLE
CURRENT GENERATION PART FIBRE	PART FIBRE	1 ST GENERATIONAL FIBRE
CURRENT GENERATION CABLE	ADSL	1 ST GENERATIONAL CABLE
CURRENT GENERATION ADSL		COPPER

Q. Which of these three lists do you think...

List 2 was the simplest and easiest to understand



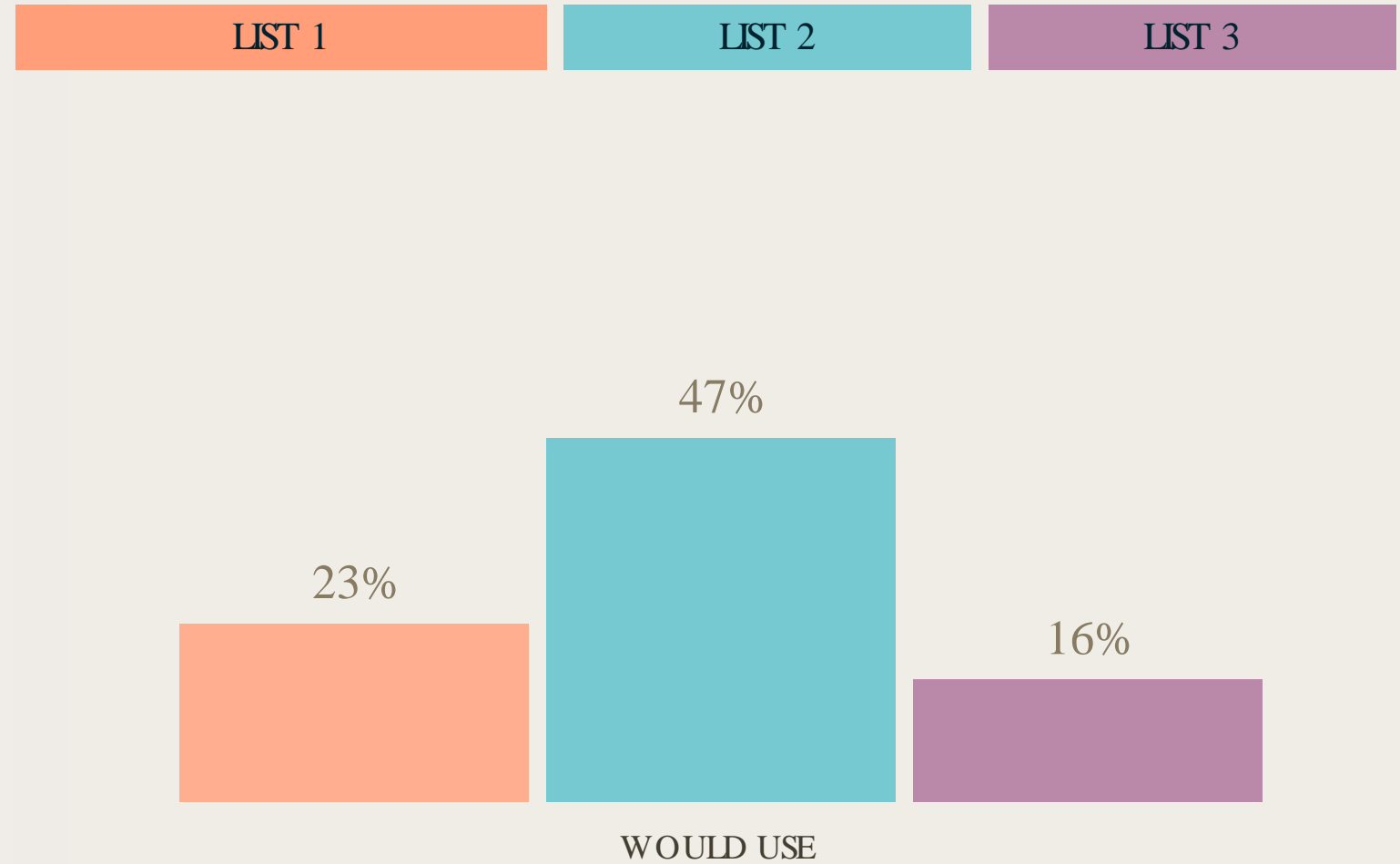
BASE: ALL RESPONDENTS (

WHICH WOULD YOU USE

By LIST

Q. And if you were able to choose how different types of broadband were described in the UK, which would you use...?

...and this would be the biggest pull



And finally, we asked respondents to express their preference by a forced comparison model for speed, reliability, value, first choice and appropriateness

FASTEST

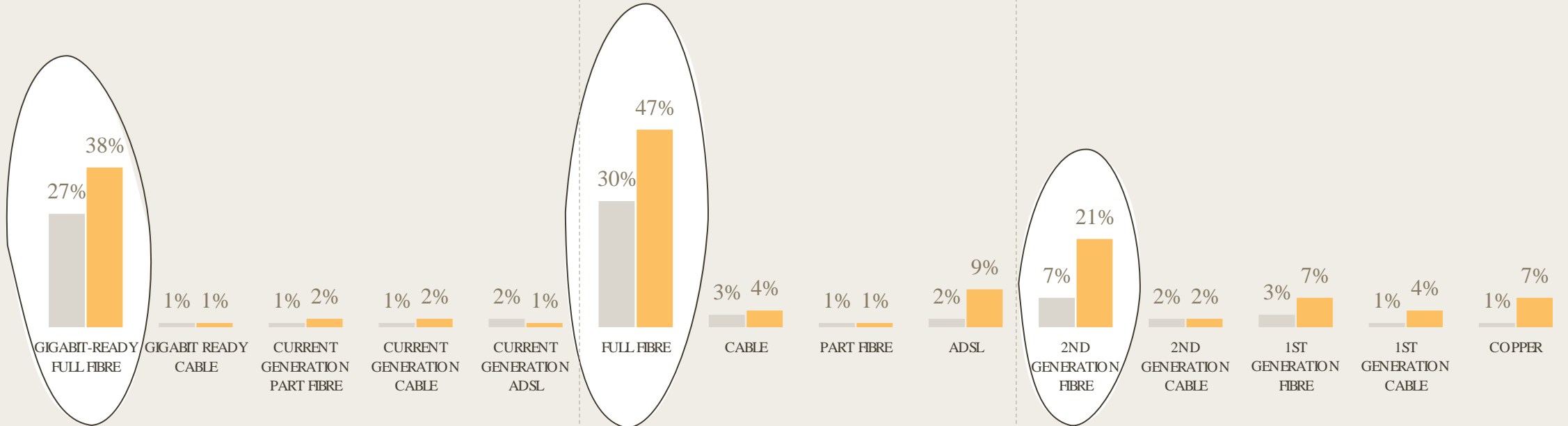
Forced Comparison

Q. Finally, thinking specifically about all these different types of broadband that we've shown you, which do you think would be...?

Full fibre resonates as the fastest type of broadband on a total and monadic level

TOTAL

MONADIC



RELIABLE

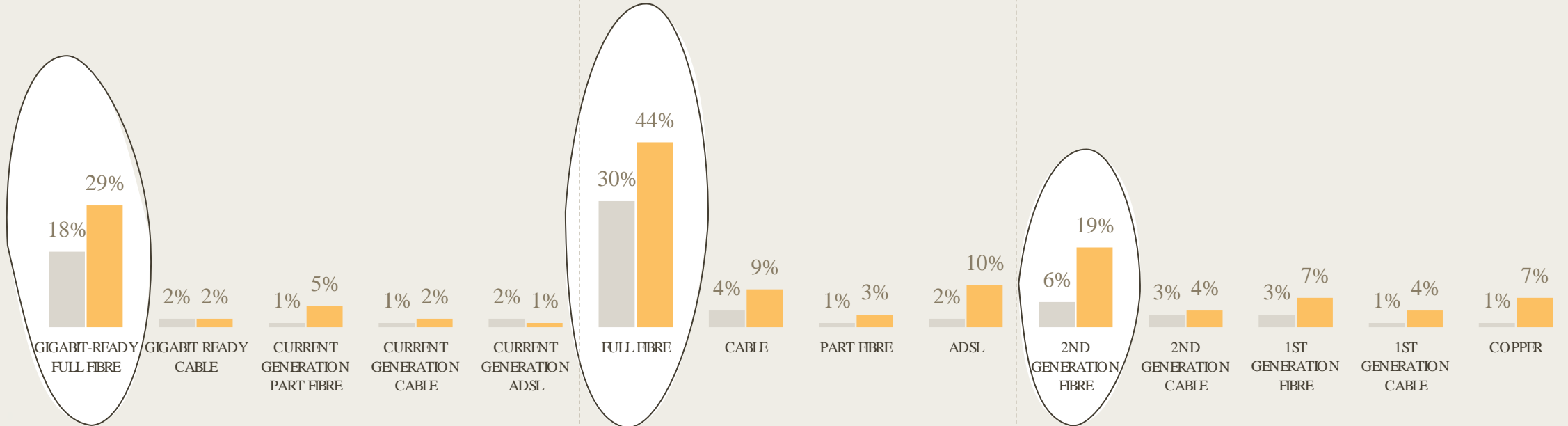
Forced Comparison

Q. Finally, thinking specifically about all these different types of broadband that we've shown you, which do you think would be...?

...and reliable too, followed by Gigabit Ready Full Fibre and 2nd Gen Fibre

TOTAL

MONADIC



VALUE

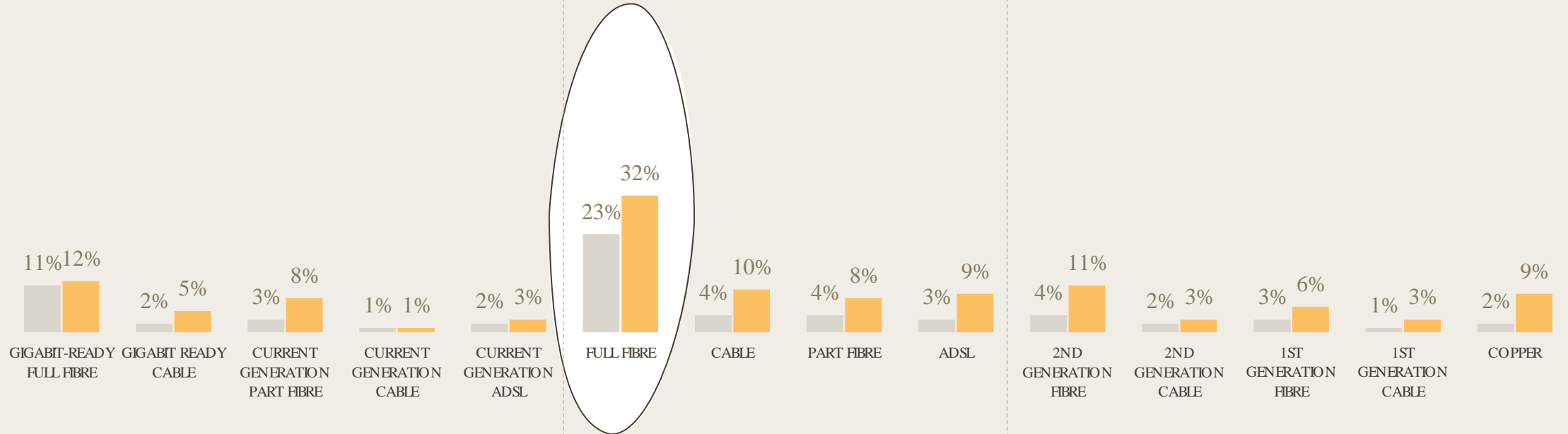
Forced Comparison

Q. Finally, thinking specifically about all these different types of broadband that we've shown you, which do you think would be...?

...with Full fibre seen as the best value

TOTAL

MONADIC



FIRST CHOICE

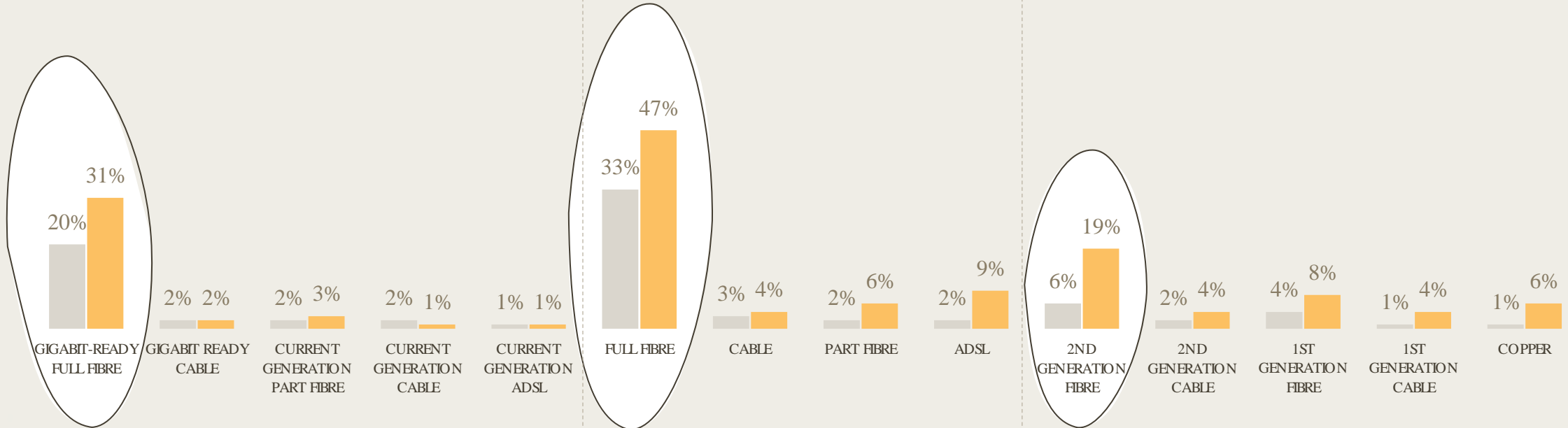
Forced Comparison

...and first choice preference

Q. Finally, thinking specifically about all these different types of broadband that we've shown you, which do you think would be...?

TOTAL

MONADIC



MOST APPROPRIATE FOR ME AND MY FAMILY

Forced Comparison

Q. Finally, thinking specifically about all these different types of broadband that we've shown you, which do you think would be...?

...and most appropriate for me and the family

TOTAL

MONADIC

