



# Broadband affordability and accessibility

Consumer Council for Northern Ireland

June 2024

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## Executive summary

In December 2023, the Consumer Council commissioned Cognisense to administer a research project regarding broadband affordability and accessibility, the objective of which was to obtain information to help inform policy and representation activities.

The project consisted of a representative quantitative survey of 1,000 Northern Ireland consumers and a programme of five focus groups, with 8 to 9 consumers in each. Some of the key findings from the research are detailed in this section of the report.

### Key findings

#### Availability and accessibility

- 96% of respondents connected to the internet at home via their home broadband service.
- 45% of respondents stated that they have superfast broadband (between 30 Mbps and 300 Mbps) in their household, making it the most common service used.
- 97% of respondents felt that having internet access at home is important to their daily life.

#### Satisfaction with broadband provider and broadband service received

- 74% of respondents were satisfied overall with their broadband service, whilst 8% were dissatisfied.
- Despite this, 45% had experienced an issue with their current broadband provider over the last 12 months. Connection problems (27%) and slow broadband speeds (20%) were the most likely issues to have been encountered. A decline in speeds was the most common issue amongst focus group participants.
- 74% of respondents were satisfied with the speed of their provider and 60% were satisfied with their current provider's customer service.

#### Affordability of broadband contract

- The majority of respondents (56%) were paying between £21-40 per month for their broadband.
- 61% of respondents were satisfied with the value for money of their broadband service.
- Whilst 78% of respondents felt that their current broadband contract was affordable, 21% did not feel that this was the case.

- 15% of respondents had struggled to pay their broadband bill in the last 12 months.
- Amongst those who struggled to pay, 42% made cuts elsewhere to ensure they could pay, whilst 22% missed a payment.
- 21% of respondents had changed broadband package and/or supplier in the last 12 months, with the majority (62%) doing so to make their bill cheaper.
- The majority (61%) of respondents were unaware that some broadband providers offer social tariffs, which are basic broadband packages for those on certain benefits.
- Five per cent of respondents indicated they were using a social tariff. 6% knew someone who used a social tariff.

### Vulnerable consumer groups

- When compared to the overall sample (13%), standard broadband (less than 30 Mbps) was more prevalent amongst those aged 65+ (23%), those with a disability (22%), and those living in a rural area (19%).
- Rural residents were more likely than those living in urban areas to agree that on account of where they live, they have fewer choices of broadband providers (48% versus 23%), that their broadband speed is slower (40% versus 16%), and that they face broadband connection issues (31% versus 18%).
- Rural residents were more likely than those living in urban areas to be dissatisfied with the speed of their broadband service (20% versus 8%).
- When compared to the overall sample (10%), monthly broadband bills of between £0-20 per month were more prevalent amongst those with a disability (20%) and amongst those from lower income households (15%).
- The incidence of struggling to pay a broadband bill was considerably higher amongst those with a disability (27%) when compared to the overall sample (15%).
- Awareness (50%) and usage (14%) of social tariffs were more prevalent amongst those with a disability when compared to the overall sample (39% and 5%, respectively).

## Introduction

The Consumer Council for Northern Ireland (Consumer Council) is a non-departmental public body (NDPB) established through the General Consumer Council (Northern Ireland) Order 1984. Its principal statutory duty is to promote and safeguard the interests of consumers in Northern Ireland. The Consumer Council has specific statutory duties in relation to energy, postal services, transport, water and sewerage, and food affordability, which include considering consumer complaints and enquiries, carrying out research and educating and informing consumers.

To support the delivery of its duties, the Consumer Council undertakes research activities which provide insight into consumer issues in Northern Ireland.

## Background

Northern Ireland has unique geographic and economic challenges compared to the rest of the United Kingdom (UK). Northern Ireland represents 3% of the total UK population (c.1.9 million versus c.67 million),<sup>1</sup> with more than double the proportion of citizens living in rural areas (36%) compared to England (17.1%) and Scotland (17%).<sup>2</sup>

Despite having a lower unemployment rate, Northern Ireland has the highest rate of economic inactivity across the UK (26.6% versus 20.9%)<sup>3</sup> and has a higher rate of consumer vulnerability compared to the UK (50% versus 47%).<sup>4</sup>

To investigate the impact of the cost of living crisis on households in Northern Ireland, the Consumer Council publishes the Household Expenditure Tracker on a quarterly basis. The Tracker examines income and expenditure for households in Northern Ireland across four income groups (quartiles).

The latest published data for Q4 2023<sup>5</sup> (October to December) shows that the lowest earning household earn an average of £271.93 per week, 8% less than the UK Average of £295.73. The lowest earning households in Northern Ireland are also more reliant on social security payments which makes up 72% of their income compared to 62% in the UK.

After accounting for basic spending costs, the lowest earning households in Northern Ireland are left with less than £36.65 per week. This is a fall of 43% since the peak in the first quarter of 2021 (£64.02).

The increase of digitalisation and reliance of consumers on their broadband service to live, work and learn is at the heart of this research. Broadband is seen by the majority of consumers as an essential service. Research conducted by the Consumer Council in May 2021 found that COVID-19 had a significant impact on the level of reliance that consumers had on the internet. In 2023, the Consumer Council

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<sup>1</sup> National Online Manpower Information System (NOMIS), Total Population, 2021

<sup>2</sup> NI: Northern Ireland Statistics and Research Agency (NISRA), NI: In Profile, November 2022. England: Department for Environment, Food and Rural Affairs (Defra), Rural population and migration, October 2021. Scotland: Scottish Government, Rural Scotland Key Facts 2021, February 2021.

<sup>3</sup> National Online Manpower Information System (NOMIS), Labour Supply, Apr-Jun 2023.

<sup>4</sup> Financial Conduct Authority (FCA), Financial Lives May 2022 survey: selected results by nation of the UK, July 2023.

<sup>5</sup> The Consumer Council, The Northern Ireland Household Expenditure Tracker, Q4 2023 (October to December 2023)

carried out further research to investigate and quantify the digital literacy of the Northern Ireland population. This included online accessibility and exclusion, confidence using the internet, negative online experiences and general affordability, including social tariffs or basic broadband packages for consumers in receipt of benefits.

This research project aimed to look in more detail at the Northern Ireland consumer experiences of availability, accessibility, affordability and service provided by broadband companies with a particular focus on vulnerable consumers.

## Background

The objectives were:

- To utilise quantitative (a survey representative of the Northern Ireland population) and qualitative (focus groups) methods to undertake research into issues relating to broadband affordability and accessibility.
- To ensure that this research delivers results that identify the key issues for vulnerable groups, including those with a disability, those from lower income households, those in rural areas, and those of a pensionable age.
- To deliver a report on consumer experiences of broadband accessibility and affordability in Northern Ireland.
- To use the report findings to inform policy development by highlighting current and emerging issues that Northern Ireland consumers are facing.

## Methodology

An online quantitative survey of 1,000 Northern Ireland residents was administered in December 2023. Quota controls based on official population estimates were employed throughout survey fieldwork and corrective RIM (Random Iterative Method) weighting was applied during data analysis. The final sample was representative of the Northern Ireland population in terms of sex, age, socio-economic group (SEG) and region. The questionnaire used for the survey was developed by the Consumer Council.

The quantitative survey was followed in January 2024 by a programme of five 90minute qualitative focus groups. Each group contained 8 to 9 adult participants, all of whom were recruited in accordance with strict demographic criteria to ensure that a broad range of consumers were represented. The discussion guide used for the focus groups was developed by the Consumer Council. The composition of each group is detailed in the following table:

Group	Age	Socio-economic group	Local Government Districts
1	24 to 55	ABC1/C2	Antrim and Newtownabbey, Ards and North Down, Belfast
2	N/A	C1C2	Derry City and Strabane, Newry, Mourne and Down Belfast
3	65 and over	C1C2	Lisburn and Castlereagh

			Mid and East Antrim Causeway Coast and Glens Belfast
4	N/A	DE	Belfast
5	N/A	ABC1	Armagh City, Banbridge and Craigavon Fermanagh and Omagh Mid Ulster Belfast

There were five focus group split across Northern Ireland demographic profiles.

- The first were aged 24 to 55 years. They were from the ABC1 and C2 socio-economic groups. The participants were from the Local Government Districts Antrim and Newtownabbey, Ards and North Down and Belfast.
- The second group were from all age groups. They were from the C1C2 socio-economic group. The participants were from the Local Government Districts Antrim and Derry City and Strabane, Newry, Mourne and Down and Belfast.
- The third group were aged 65 and over. They were from the C1C2 socio-economic group. The participants were from the Local Government Districts Lisburn and Castlereagh, Mid and East Antrim, Causeway Coast and Glens and Belfast.
- The fourth group were from all age groups. They were from the DE socio-economic group. The participants were from the Local Government District of Belfast.
- The final group were from all age groups. They were from the DE socio-economic group. The participants were from the Local Government Districts of Armagh City, Banbridge and Craigavon, Fermanagh and Omagh, Mid Ulster and Belfast.

### Technical notes

Where differences by demographics have been identified, these have been tested at the 95% confidence level.

As a result of the rounding of figures or the use of questions for which multiple answers could have been given, the sums on the charts in this report may not always total 100 per cent.

Socio-economic group (SEG) is a means of classifying respondents based on the employment status, occupation and working pattern (full-time/part-time) of the head of household. There are six socio-economic grades: A, B, C1, C2, D and E. For



analysis purposes, these grades have been combined into the following groups: 'ABC1' (higher income households) and 'C2DE' (lower income households).

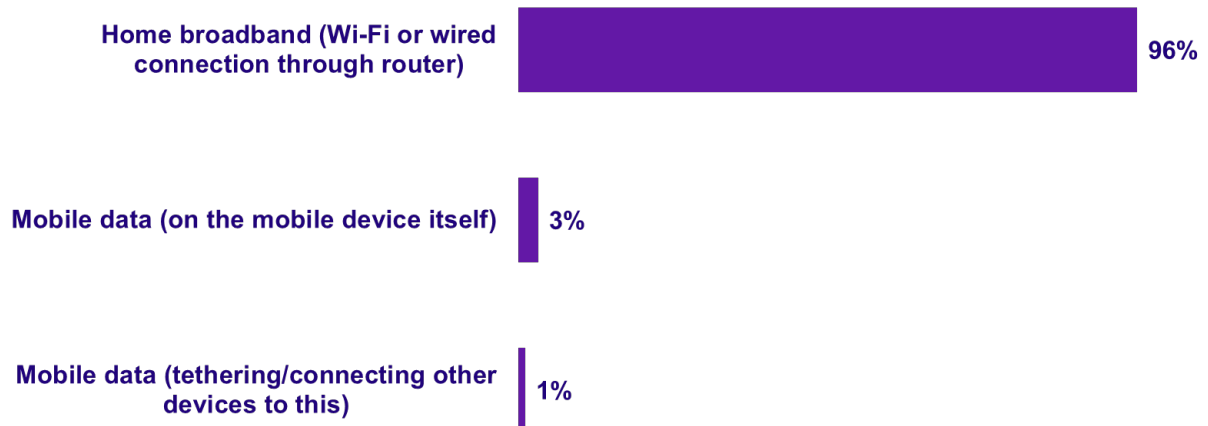
Urban and rural respondents are identified by the demographic questions that they were asked prior to the survey. The postcode that a respondent provides is cross-referenced against the Northern Ireland Statistics and Research Agency's (NISRA) Central Postcode Directory, which contains an urban or rural indicator.

## Availability and accessibility

### Main method of connecting to the internet at home

For most (96%) respondents, the main way of connecting to the internet at home was via their home broadband service (Figure 1). Small numbers used mobile data on the device itself (3%) or mobile data via tethering (1%).

**Figure 1: Main method of connecting to the internet at home**



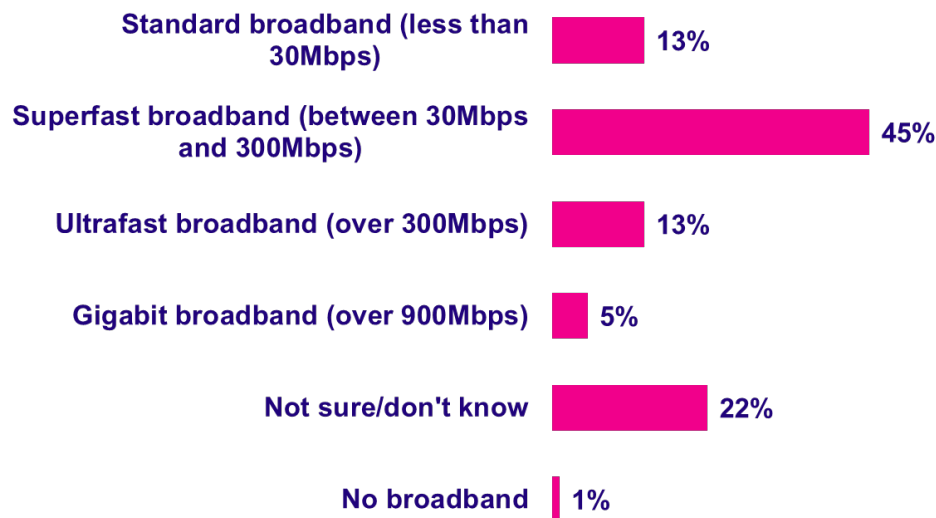
Base: all respondents (n=1000)

### Broadband service used currently

Nearly half (45%) of respondents stated that they have superfast broadband in their household, making it the most common service used (Figure 2). Around one in eight (13%) used standard broadband (less than 30Mbps), and (13%) used ultrafast broadband (over 300 Mbps), whilst one in twenty (5%) used gigabit broadband (over 900 Mbps). Around a fifth (22%) stated that they were not sure or did not know what broadband service is used in their household.

When compared to the overall sample, standard broadband (less than 30 Mbps) was more prevalent amongst those aged 65+ (23%), those with a disability (22%) and those living in a rural area (19%).

**Figure 2: Broadband service used currently**

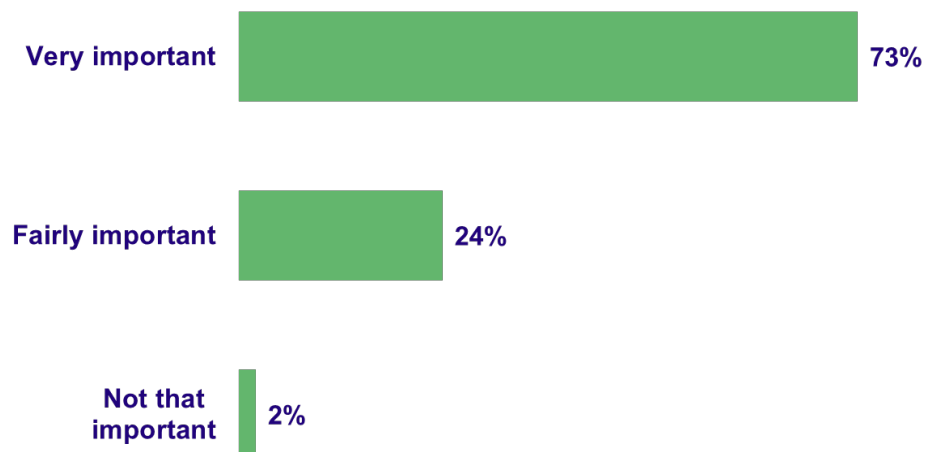


Base: all respondents (n=1000)

### Importance of internet access at home to daily life

The vast majority (97%) of respondents stated that having internet access at home is important to their daily life (Figure 3).

**Figure 3: Importance of internet access at home to daily life**



Base: all respondents who use broadband (n=990)

The qualitative research revealed that there are numerous reasons that having internet access at home is important to daily life, including the facilitation of home working, children's education and entertainment, gaming, online banking, and online shopping. Many focus group participants felt that having internet access at home had become even more important since the COVID-19 pandemic.

**‘I think we [people in general] are more reliant on the internet now than we were before COVID. We certainly are in our house. We use it for everything.’**

**‘I need it [broadband] to work from home.’**

**‘I like to work from home at least part of the week, so I need reliable broadband.’**

**‘Schools are using the internet a lot more since COVID. My kids’ school never went back to doing homework by hand.’**

**‘I can get on with the housework if the kids are on their devices. If the internet goes down all hell breaks loose.’**

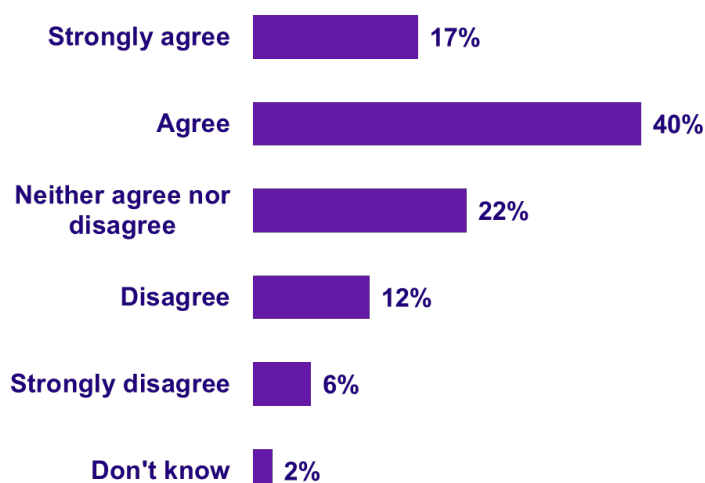
**‘We do a lot of gaming in our house so [broadband] speed is a must.’**

**‘We could not have lived through COVID without it [broadband]. We literally watched every film and series there was to watch on Disney+.’**

### **Knowledge of broadband speeds (Mbps)**

Around three in five (57%) respondents agreed that they understand broadband speeds and what is right for them, around a fifth (18%) disagreed, whilst a similar number (22%) neither agreed nor disagreed (Figure 4).

**Figure 4: Extent of agreement: I understand broadband speeds (Mbps) and what is right for me**



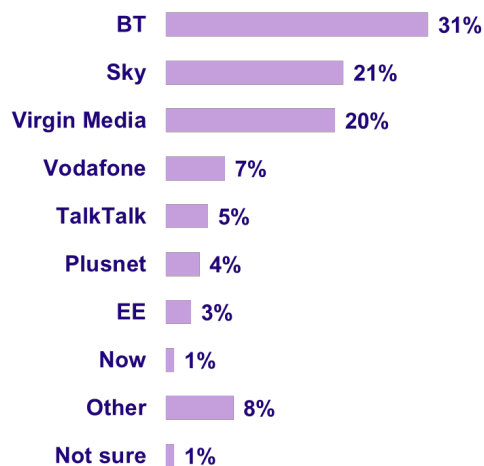
Base: all respondents who use broadband (n=990)

## Satisfaction with provider and service received

### Current broadband provider

The main broadband providers used by Northern Ireland consumers were BT (31%), Sky (21%) and Virgin Media (20%) (Figure 5). Fewer respondents were using Vodafone (7%), TalkTalk (5%), Plusnet (4%), EE (3%) or Now (1%).

**Figure 5: Current broadband provider**



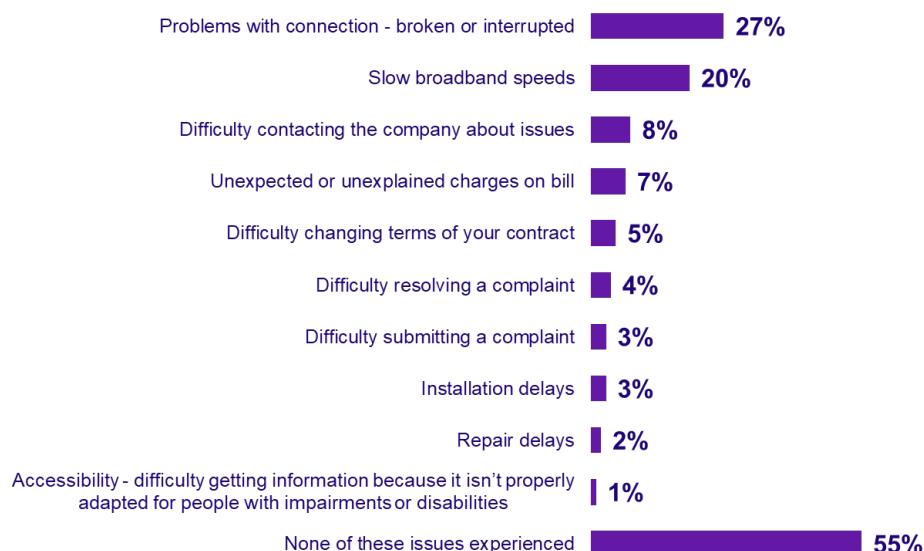
Base: all respondents who use broadband (n=990)

### Issues experienced with current broadband provider over the last 12 months

Nearly half (45%) of respondents had experienced an issue with their broadband provider over the last 12 months. Connection problems (27%) and slow broadband speeds (20%) were the most likely issues to have been encountered (Figure 6).

Other issues that were detailed by consumers included difficulty contacting the company about issues (8%), unexpected or unexplained charges on bill (7%), difficulty changing terms of contract (5%).

**Figure 6: Issues experienced with current broadband provider over the last 12 months**



Base: all respondents who use broadband (n=990)

Amongst focus group participants, the most likely issue to have been experienced was a decline in speed. When an engineer was dispatched to address the issue, it was appreciated.

**'I had to call them out a few times because the speed was not right and I am close to the exchange. The fella who came was great. They gave me a four-hour window and I had to nip out to collect kids. He actually waited until I got home.'**

However, some participants reported occasions when they were instructed by the person on the phone to do a number of things to try to fix the fault. This was frustrating for two reasons. Firstly, they felt they were not getting the service they were paying for and secondly, they did not feel confident in doing the things they were being asked to do.

**'Very frustrating paying for a service you aren't getting.'**

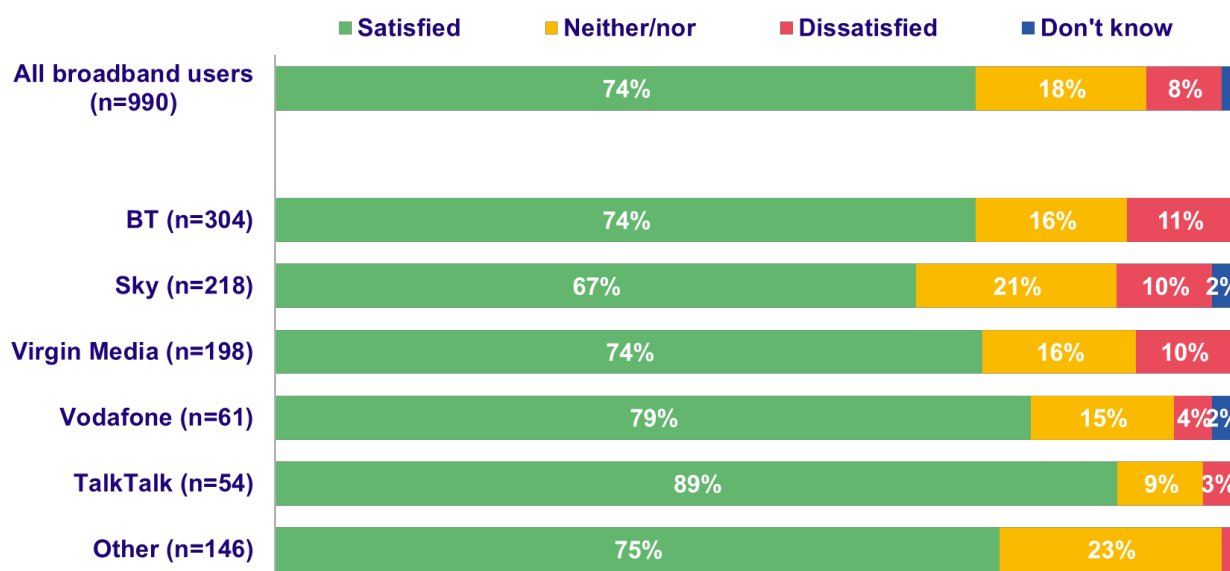
**'I'm not good with technology and they were asking me to do the things. It was like fix it yourself.'**

**'I'm paying them to fix problems and they are telling me to do it.'**

## Overall experience

Almost three-quarters (74%) of respondents were satisfied overall with their broadband service, one in ten (8%) were dissatisfied and close to a fifth (18%) were neither satisfied nor dissatisfied (Figure 7).

**Figure 7: Extent of satisfaction with broadband service: overall experience**



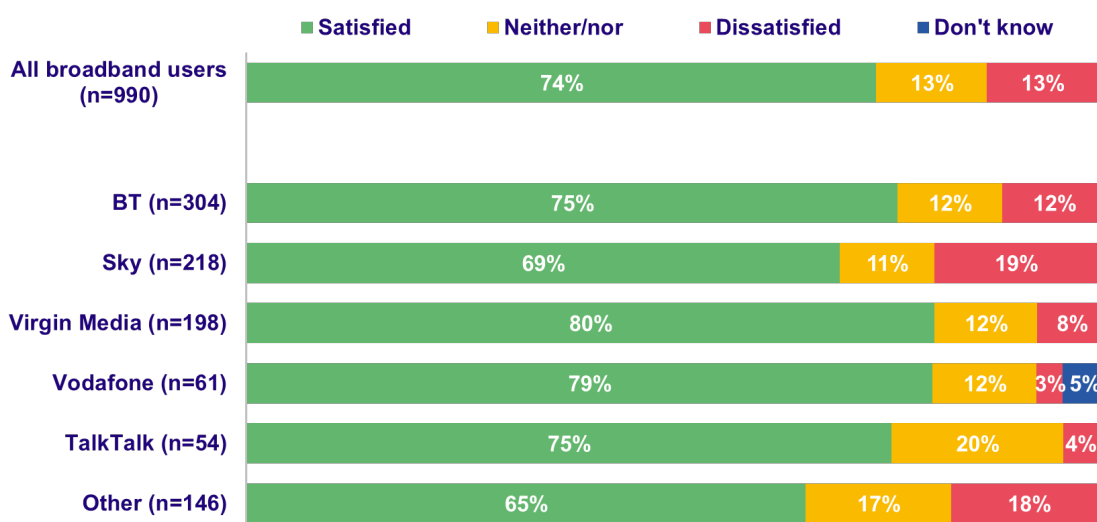
Base: all respondents who use broadband (n=990)

Note: a chart segment without a data label = 1%

## Speed of broadband service

Almost three-quarters (74%) of respondents were satisfied with the speed of their broadband service, around one in eight (13%) were neither satisfied nor dissatisfied, whilst the same number (13%) were dissatisfied (Figure 8).

**Figure 8: Extent of satisfaction with broadband service: speed**



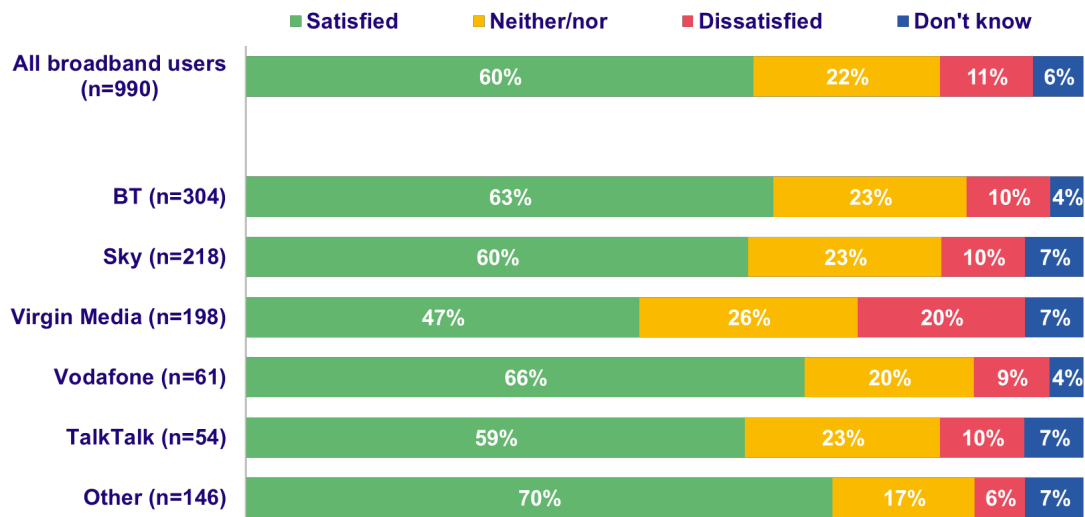
Base: all respondents who use broadband (n=990)

Note: a chart segment without a data label = 1%

## Customer service

Three in five (60%) respondents were satisfied with the customer service from their broadband provider, about a fifth (22%) were neither satisfied nor dissatisfied, whilst around one in ten (11%) were dissatisfied (Figure 9).

**Figure 9: Extent of satisfaction with broadband service: customer service**



Base: all respondents who use broadband (n=990)

Note: a chart segment without a data label = 1%



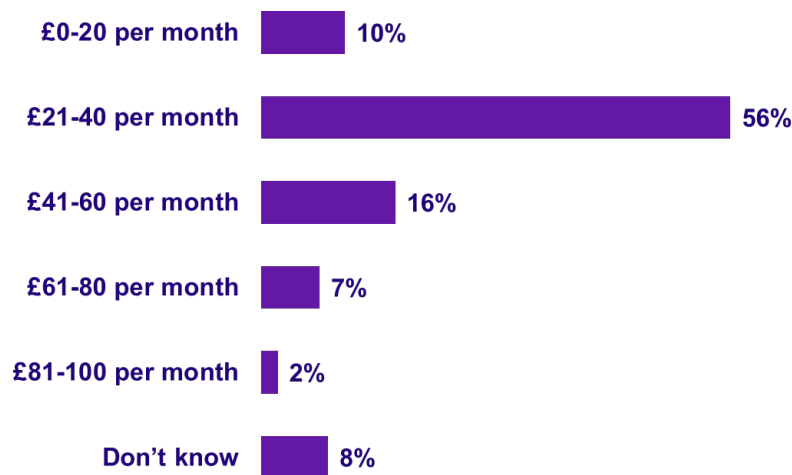
## Affordability

### Monthly costs of broadband

One in ten (10%) respondents were paying between £0-20 per month, nearly three in five (56%) were paying between £21-40 per month, whereas around one in six (16%) were paying £41-60 per month (Figure 10). Close to one in ten (9%) were paying more than £61 per month, whilst a similar number (8%) did not know how much they were paying.

When compared to the overall sample, monthly broadband bills of between £0-20 per month were more prevalent amongst those with a disability (20%) and amongst those from lower income households (15%).

**Figure 10: Amount household pays for broadband**

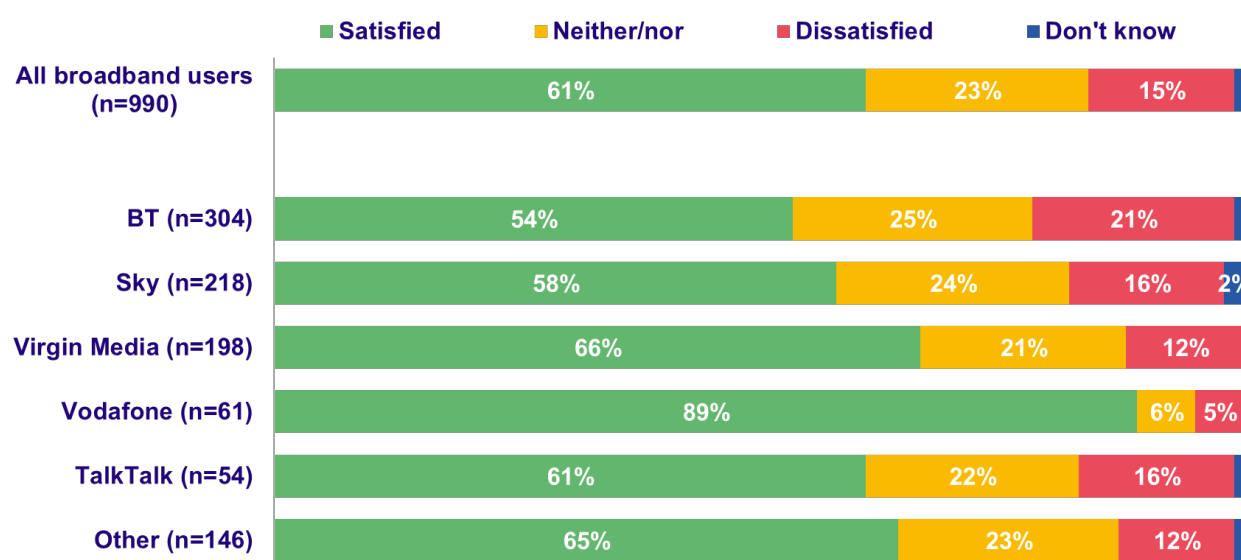


Base: all respondents who use broadband (n=990)

## Value for money of broadband service

Around three in five (61%) respondents were satisfied with the value for money of their broadband service, nearly a quarter (23%) were neither satisfied nor dissatisfied, whilst about one in six (15%) were dissatisfied (Figure 11).

**Figure 11: Extent of satisfaction with broadband service: value for money**



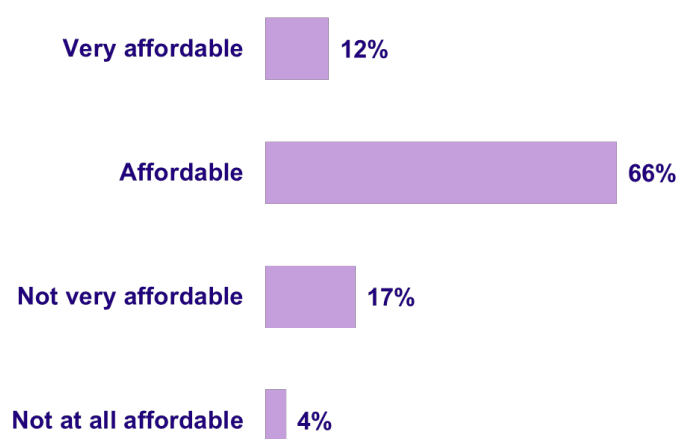
Base: all respondents who use broadband (n=990)

Note: a chart segment without a data label = 1%

## Affordability of current broadband contract

For around a fifth (21%) of respondents, their current broadband contract was not affordable (Figure 12).

**Figure 12: Affordability of current broadband contract**

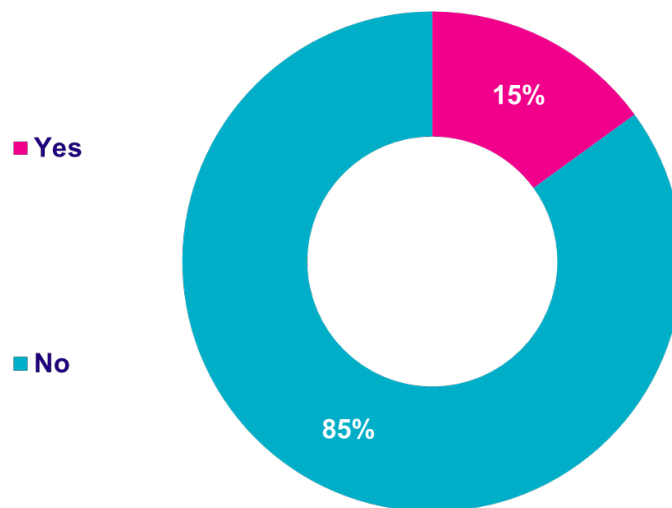


Base: all respondents who know how much their household pays for broadband (n=919)

### Struggles over the last 12 months

Around one in six (15%) respondents stated that they have struggled to pay their broadband bill in the last 12 months (Figure 13).

**Figure 13: Struggled to pay broadband bill in the last 12 months**



Base: all respondents who use broadband (n=990)

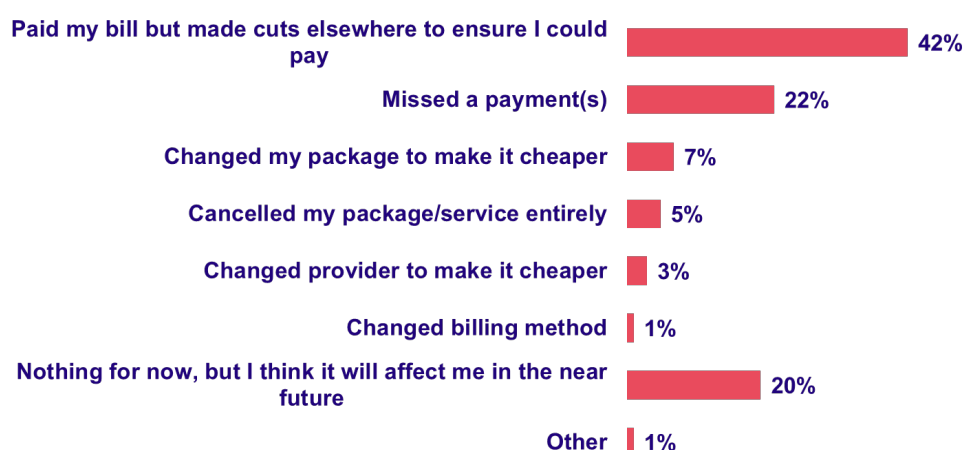
### Outcome of struggling to pay broadband bill in the last 12 months

Amongst those that struggled to pay their broadband bill, around two in five (42%) made cuts elsewhere to ensure they could pay, whilst about a fifth (22%) missed a payment (Figure 14).

Fewer respondents took the following actions:

- changed package to make their bill cheaper (7%)
- cancelled their package/service entirely (5%)
- changed provider to make it cheaper (3%)
- changed billing method (1%)
- for a fifth (20%) of respondents there was no negative impact from struggling to pay, however these individuals felt that they will be affected in the future.

**Figure 14: Outcome of struggling to pay broadband bill in the last 12 months**

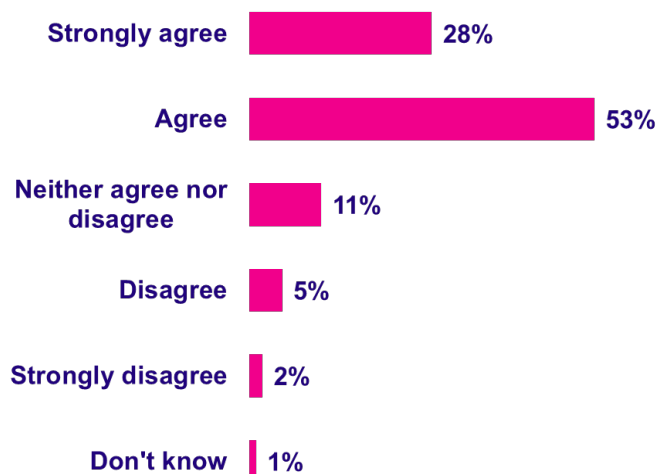


Base: all respondents who struggled to pay their broadband bill in the last 12 months (n=126)

### Understanding of switching

Around four in five (81%) respondents agreed that they understand how to switch providers and shop around for better deals, whereas 7% disagreed that this is the case (Figure 15). About one in ten (11%) neither agreed nor disagreed that they understand how to switch providers and shop around for better deals, whilst a very small (1%) number stated that they did not know.

**Figure 15: Extent of agreement: I understand how to switch providers and shop around for better deals**

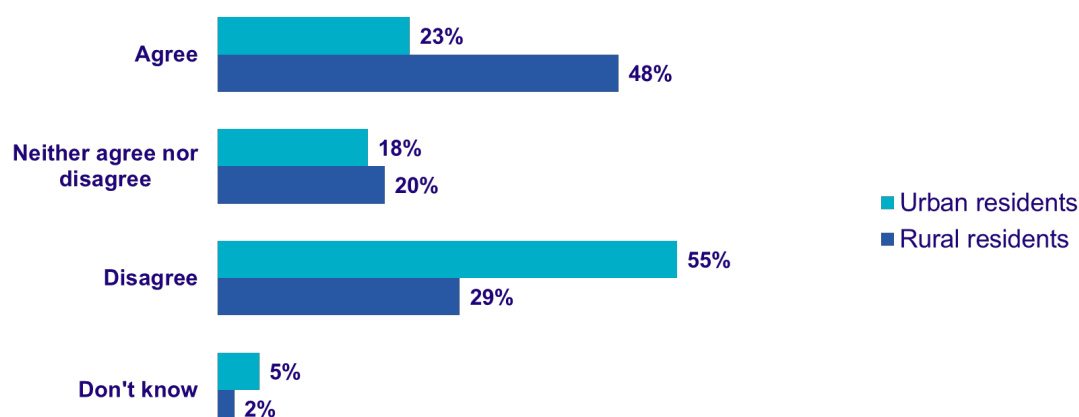


Base: all respondents who use broadband (n=990)

### Impact of location on choice of broadband provider

Nearly half (48%) of rural residents agreed that they have fewer choices of broadband provider because of where they live, which was more than double the number of urban residents who felt this way (23%) (Figure 16).

**Figure 16: Extent of agreement: I have less choice in broadband providers because of where I live**

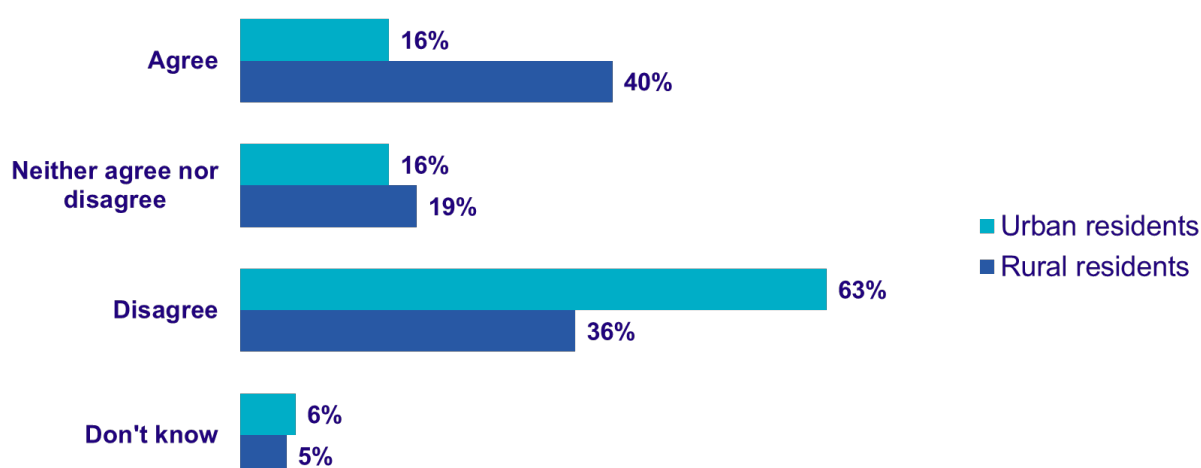


Base: all urban residents that use broadband (n=576); all rural residents that use broadband (n=253)

### Impact of location on broadband speed

Two in five (40%) rural residents agreed that their broadband speed is slower due to where they live, which was notably higher than the number of urban residents who were of this view (16%) (Figure 17).

**Figure 17: Extent of agreement: my broadband speed is slower due to where I live**

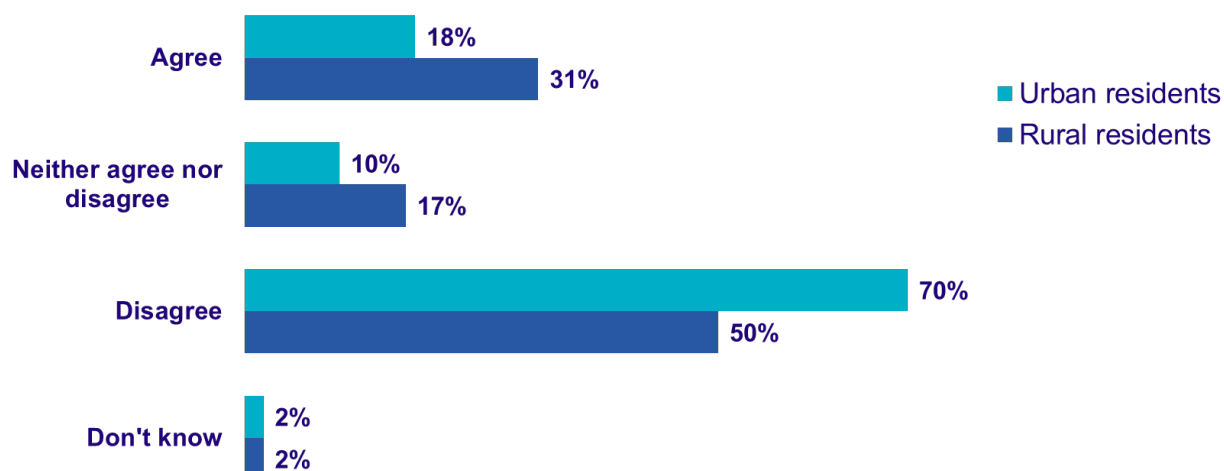


Base: all urban residents that use broadband (n=576); all rural residents that use broadband (n=253)

### Impact of location on broadband connection

Around three in ten (31%) rural residents agreed that they face broadband connection issues due to where they live, which was considerably higher than the number of urban residents who felt this way (18%) (Figure 18).

**Figure 18: Extent of agreement: I face broadband connection issues (broken or interrupted) due to where I live**

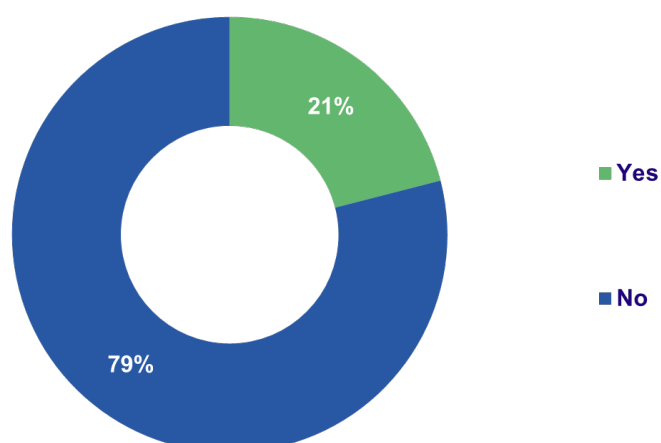


Base: all urban residents that use broadband (n=576); all rural residents that use broadband (n=253)

### Changed broadband package and/or supplier in the last 12 months

Around a fifth (21%) of respondents stated that their household had changed broadband package and/or supplier in the last 12 months (Figure 19).

**Figure 19: Changed broadband package and/or supplier in the last 12 months**

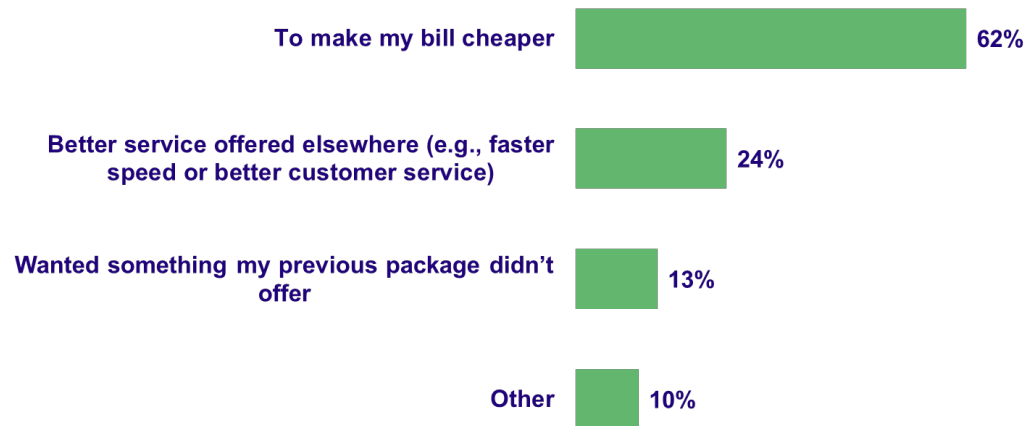


Base: all respondents who use broadband (n=990)

### Reasons for changing broadband package and/or supplier

Amongst those whose household had changed their broadband package and/or supplier in the last 12 months, the majority (62%) did so to make their bill cheaper (Figure 20).

**Figure 20: Reasons for changing broadband package and/or supplier**



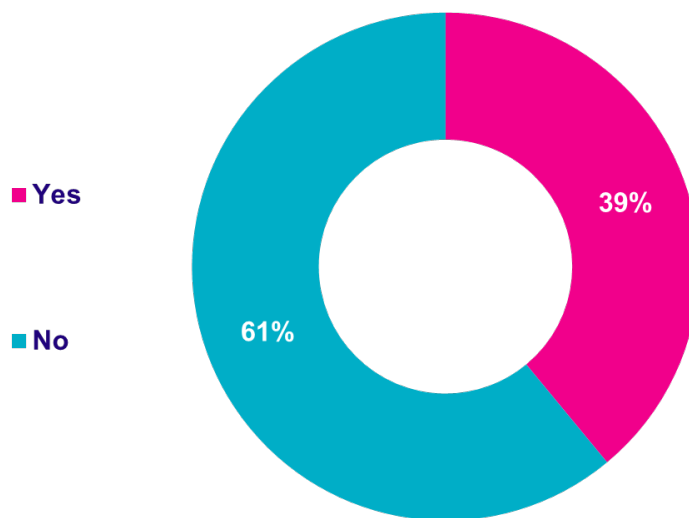
Base: all respondents whose household had changed broadband package and/or supplier in the last 12 months (n=218)

## Awareness and usage of social tariffs for broadband

Social tariffs are cheaper broadband packages for people claiming Universal Credit, Pension Credit and some other benefits. Some providers call them 'essential' or 'basic' broadband. These are delivered in the same way as normal packages, just at a lower price.

The majority (61%) of consumers were not aware of these broadband packages (Figure 21).

**Figure 21: Aware that some broadband providers offer social tariffs**



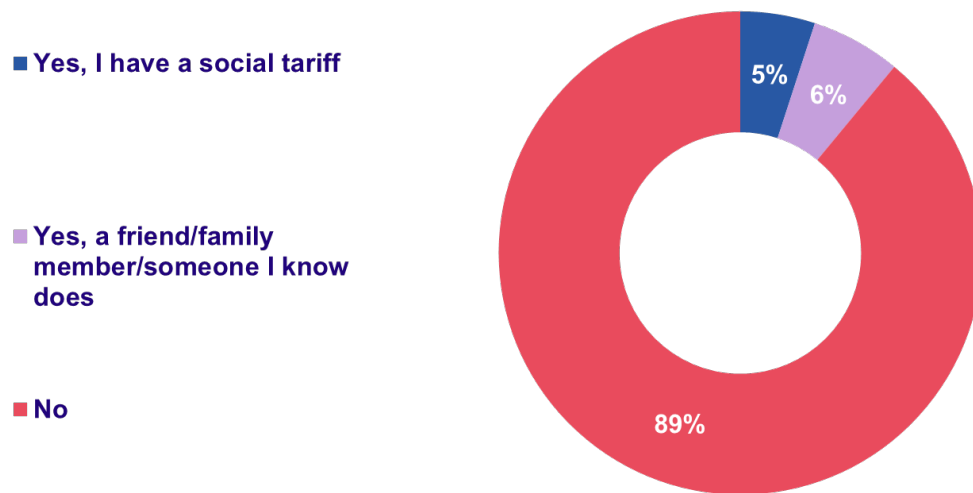
Base: all respondents (n=1000)



### Currently use a social tariff or know someone who does

One in twenty (5%) respondents stated that they were using a social tariff, whilst a similar number (6%) stated that they knew someone who was doing so (Figure 22).

**Figure 22: Currently use a social tariff or know someone who does**



Base: all respondents (n=1000)

## Vulnerable consumer focus groups

This section of the report provides an overview of some of the key findings concerning the following vulnerable consumer groups: rural residents, consumers from lower income households (C2DE), those aged 65+, and those who have a disability.

### Rural residents

Rural residents were less likely than those living in urban areas to have been satisfied with their broadband service (68% versus 76%). They were also more likely than those living in urban areas to have been dissatisfied with the speed of their broadband service (20% versus 8%).

The focus groups revealed that some of those living in rural areas were using the internet to access a bank or Post Office as they did not have local in-person alternatives for these essential services.

There was frustration amongst rural residents regarding the limited number of companies servicing their areas and the reduced likelihood of being able to avail of fibre broadband. Many were also irritated by having to pay similar prices to those in urban areas who were felt to be receiving a much better service offering.

Many of the rural residents in the focus groups described how they were told by their provider that there was little that could be done in terms of broadband speed as many of the causes were beyond the provider's control, such as the distance of a home from the exchange. There was a reluctance to switch provider (if an alternative was available) as confidence was low that a change would bring about an improvement of service.

**‘We need our broadband so I would worry about switching. Could be without it for a few days and end up with the same problem in the end anyway.’**

**‘We only have one other option in our area and I just think there is no point going to the hassle of changing because they probably won’t be any better.’**

### Lower income households

In the focus groups, many consumers from lower income households stated that having broadband allowed them to save money by shopping online, which was particularly welcome as the cost of living crisis had tightened budgets. Online shopping provided the opportunity to spot offers, whilst avoiding the temptation of picking up unnecessary items seen in stores. Furthermore, money did not need to be spent on fuel and parking.

Consumers in the focus groups from lower income households talked about the actions they took to ensure they could pay for their broadband service. In many cases, a change in personal circumstances had been a contributing factor to the struggle to pay their broadband bill.

**‘I was paying a fortune for the TV package and broadband so I had to ring them and get rid of some parts so I could keep the broadband.’**

**‘I had to come out of work so I rang and said I was going to cancel. They brought the package down for 18 months.’**

**‘I had to drop from full-time to part-time hours so phoned Sky to explain. They dropped the price for me which was great.’**

**‘My bill had doubled and I couldn’t afford it. I rang them and they took stuff out of the package to get the cost down.’**

When social tariffs were discussed in the focus groups, many of these consumers were unaware of social tariff broadband packages and stated that they would be very interested to find out more about them. However, it was noted that the importance of broadband to their lives meant that they could not switch to a cheaper package if the service would be unreliable.

**‘Of course I want a lower price, but if the connection was terrible I couldn’t use it.’**

**‘The kids need it for their homework and it needs to run fast. No point in a cheaper price if it doesn’t work.’**

**‘I’m not working so can’t afford big bills but I have three young kids at home so I need speed.’**

In terms of communicating information regarding social tariffs, there was a suggestion a leaflet could be included with communications about benefits, as these letters were more likely to be read than letters from providers.

**‘I probably wouldn’t read a letter from BT but I would read a letter about my benefits, so if they put the information in there I’d get it.’**

### **Consumers aged 65 and over**

Many of the focus group participants who were in this age category stated how they relied on broadband for communicating with family and friends when they were unable to get out during the COVID-19 pandemic. Many of these people had been shielding and some were still reluctant to put themselves at unnecessary risk of contracting the virus, avoiding supermarkets and shopping in general.

**‘It’s [broadband] more important since COVID. I’ve become a bit of a recluse.’**

When compared to the total sample, those aged 65 and over were a little less likely to have been satisfied with the value for money of their broadband service (53% versus 61%) and with the overall experience with their provider (68% versus 74%).

However, those from this age group were considerably less likely to have struggled to pay their broadband bill in the last 12 months when compared to the overall sample (2% versus 15%).

### **Consumers with a disability**

When compared to the overall sample, those with a disability were much more likely to have struggled to pay their broadband bill in the last 12 months (27% versus 15%).

In the focus groups, some consumers with a disability stated that they had made sacrifices elsewhere in their budgeting to pay for broadband, a service which they felt was essential.

### **‘We need broadband so have to cut back on other things to be able to afford it.’**

Relative to the overall sample, those with a disability were more likely to be aware that some broadband providers offer social tariffs (50% versus 39%) and were also more likely to have been using one of these tariffs (14% versus 5%).

## Conclusions

The research reveals that having internet access at home was important to the lives of the overwhelming majority (97%) of consumers. Overall, around three-quarters (74%) were satisfied with their broadband service.

However, when compared to urban residents, those living in rural areas were significantly more likely to report that they have fewer choices of broadband providers (48% versus 23%), that their broadband speed is slower (40% versus 16%), and that they face broadband connection issues (31% versus 18%).

It is clear that broadband is seen as crucial but that access is limited and that many consumers in Northern Ireland struggle to access a choice of providers.

It is clear from the research that broadband affordability was an issue for a significant number of consumers. Around a fifth (21%) felt that their current contract was not affordable, whilst around one in six (15%) had struggled to pay their bill in the last 12 months, rising to nearly three in ten (27%) amongst those with a disability.

Given the existing cost of living crisis and the vulnerabilities of consumers from lower income households and those with a disability, the considerable number of respondents struggling to pay their broadband is a concern. Broadband is increasingly seen as essential to daily life. Consumers are willing to sacrifice paying other bills to maintain access for them and their family. Since COVID-19, it is essential to both home and social life.

Although nearly two in five (39%) consumers were aware that some broadband providers offer social tariffs, only a small number (5%) were using one currently. Awareness (50%) and usage (14%) of social tariffs were higher amongst those with a disability.

The Consumer Council is eager to see the continued promotion of social tariffs to eligible customers, given that a considerable amount of the most vulnerable consumers are unaware of them.

The Consumer Council will work collaboratively with relevant stakeholders such as Ofcom and continue to provide insight into the issues faced by Northern Ireland consumers.

## Appendix 1

Below are the questionnaire questions asked of the survey participants.

### Survey Questions

#### Section A: Availability and Accessibility

- What is your main way of connecting to the internet in your home?

Home broadband (Wi-Fi or wired connection through router)	1
Mobile data (on the mobile device itself)	2
Mobile data (tethering/connecting other device(s) to this)	3
Other	4

- What broadband service do you currently use in your household?

Standard broadband (Less than 30Mbps)	1
Superfast broadband (Between 30Mbps and 300Mbps)	2
Ultrafast broadband (Over 300Mbps)	3
Gigabit broadband (Over 900Mbps)	4
Not sure but definitely Broadband	5
Don't know / Not sure	6
No broadband	7

- Why do you not use broadband?

Cost of home broadband is too high/could not afford home broadband	1
I have a phone contract with high or unlimited data allowance	2
I live in a rural area without a reliable broadband connection	3
I don't use internet enough to justify a broadband contract	4
I do not know how to use the internet	5
I'm in shared/short term accommodation and don't wish to sign a broadband contract	6

- How important or unimportant is internet access at home to your daily life?

Very important	1
Fairly important	2
Not that important	3
Not important at all	4

- Thinking about your current broadband service, to what extent do you agree or disagree with the following statements?

1	I have less choice in broadband providers because of where I live
2	My broadband speed is slower due to where I live
3	I face broadband connection issues (broken or interrupted) due to where I live
4	I understand broadband speeds (i.e. Mbps) and what is right for me
5	I understand how to switch providers and shop around for better deals

Strongly agree	1
Agree	2
Neither agree nor disagree	3
Disagree	4
Strongly disagree	5
Don't know	6

Loop for each Q

## Section B: Satisfaction and Usage

- Who is your current broadband provider?

Virgin Media	1
Sky	2
BT	3
Vodafone	4
NOW	5
TalkTalk	6
EE	7
Plusnet	8
Other (please state)	9
Not sure	10

- Have you experienced any of the following issues with your current broadband provider in the last 12 months?

Unexpected or unexplained charges on bill	1
Difficulty changing terms of your contract	2
Difficulty contacting the company about issues	3
Slow broadband speeds	4
Problems with connection – broken or interrupted	5
Difficulty submitting a complaint	6
Difficulty resolving a complaint	7
Installation delays	8
Repair delays	9

Accessibility – difficulty getting information because it isn't properly adapted for people with impairments or disabilities.	10
No issues experienced	11
Other (please state)	12
None of these	13

- Thinking about your broadband service, please say how satisfied or dissatisfied you are with each of the following...?

1	Your current broadband service's value for money?
2	Your current broadband service's speed?
3	Your current broadband provider's customer service?
4	Your overall experience with your current broadband provider?

Very satisfied	1
Satisfied	2
Neither satisfied nor dissatisfied	3
Dissatisfied	4
Very dissatisfied	5
Don't know	6

Loop for each Q

### Section C: Affordability

- How much does your household pay for broadband?

£0-20 per month	1
£21-40 per month	2
£41-60 per month	3
£61-80 per month	4
£81-100 per month	5
£100+ per month	6
Don't know	7

- Thinking about your current broadband contract, how affordable is it?

Very affordable	1
Affordable	2
Not very affordable	3
Not at all affordable	4
Don't know	5

- Have you struggled to pay your broadband bill in the last 12 months?

Yes	1
No	2



- If you struggled, what was the outcome?

Paid my bill but made cuts elsewhere to ensure I could pay	1
Missed a payment(s)	2
Cancelled my package/service entirely	3
Changed my package to make it cheaper	4
Changed billing method	5
Changed provider to make it cheaper	6
Nothing for now, but I think it will affect me in the near future	7
Other (please state)	8

#### Section D: Shopping Around

- Has your household changed broadband package and/or supplier (including any optional extras like a landline or entertainment packages) in the last 12 months?

Yes	1
No	2

- Why was this?

To make my bill cheaper	1
Wanted something my previous package didn't offer	2
Better service offered elsewhere (e.g., faster speed or better customer service)	3
Other (please state)	4

#### Section E: Social Tariffs

- Are you aware that some broadband providers offer 'social tariffs'? (These are cheaper internet packages for people claiming certain benefits)

Yes	1
No	2

- Do you (or someone you know) currently use a social tariff?

Yes, I have a social tariff	1
Yes, a friend/family member/someone I know does	2
No	3

## Appendix 2

### Broadband inflation-linked price rises: Qualitative group findings

In December 2023, Cognisense was commissioned to administer a research project regarding broadband affordability and accessibility, the objective of which was to obtain information to help inform policy and representation activities.

The project consisted of a representative quantitative survey of 1,000 Northern Ireland consumers and a programme of five 90-minute qualitative focus groups. Each group contained 8 to 9 participants, all of whom were recruited in accordance with strict demographic criteria to ensure that a broad range of consumers were represented.

The discussion guide used for the focus groups was developed by the Consumer Council and included the topic of inflation-linked price rises which Ofcom was consulting on. The following insights from consumers helped inform the Consumer Council response to this consultation.

Those who had been with their current provider for a year or more were likely to have experienced mid-contract price rises. None of these individuals recalled having been made aware of potential price rises before they signed up to the contract, which was felt to be underhanded and frustrating.

Many could not understand why an increase occurred mid-contract with their broadband provider but not other services, such as mobile phones or car insurance. While most acknowledged the increase was minimal, there was a sense of aggravation that switching to another provider at the time of the increase was not possible due to a tie-in period. Many believed they had taken on a contract without having all the facts. However, some did suggest that the information may have been included in the small print but admitted that they did not read small print.

**‘My bill has gone up by a couple of pound. It is annoying because I can’t even change because I’ve another 6 months left.’**

**‘I think ours has gone up a couple of times. I rang them and they said something about inflation. I would have liked to have known this upfront.’**

**‘If it’s inflation then what I don’t understand is why my mobile phone bill didn’t go up. Makes me think it’s not legit.’**

**‘There really is nothing you can do about it because you are tied in.’**

**‘Ours has gone up by £10-£14 in total over 18 months. Because of where we live, we are limited with who we can go with, so they have us.’**

**‘It’s legalised theft if you ask me. If it’s mid-contract you can’t switch.’**

**‘With [broadband provider] I felt like every time I looked they were putting the price up.’**

A minority thought they may have received a letter or email about an increase before the payment was adjusted. The notification was perceived to have arrived a month to two weeks prior to the increase. Others explained they were unlikely to read letters or emails from their provider unless they explicitly explained what the letter was about upfront, perhaps in red on the envelope. The notification needed something to make it stand out from other junk mail. Some participants got so many emails that, if the information was emailed, they would never get around to reading it.

**‘I get lots of letters and if I think it’s from someone trying to sell me something or junk mail I won’t open it.’**

**‘I would say I have one hundred thousand emails not opened. I am never getting through them.’**

**‘Maybe if it was in big red letters on the front of a letter saying something like, this is about your monthly bill!’**

**‘I might open an email from Sky if it said something that caught my attention in the subject line but otherwise I’d delete.’**

**‘You read that much stuff you don’t know where you stand.’**

Many concluded that the information needed to be highlighted before they signed up to the contract, either over the phone or face-to-face. Many believed insurance companies were doing this very well over the phone so broadband companies should follow their example.

**‘When you are getting car insurance they read all the terms and conditions to you over the phone. You have to tell them you understand before going ahead. Could broadband companies not do the same?’**

**‘Someone came to my door to sell me the package. I would like them to explain it to me so I can ask questions.’**

OFCOM, who regulate broadband, have proposed that mid-contract price rises will have to be made clear at the point of sale and include how much in pounds and pence a contract will rise by and when any changes to prices will occur. Providers will be required to ensure this information is drawn prominently to customers' attention before they are bound by the contract.

This would prevent providers from including inflation-linked, or percentage-based, price rise terms in all new contracts.

What are your thoughts on this?

There was universal agreement this should be done as standard as customers could then make an informed decision. Currently, many were making decisions based only on what they were told at the time of committing to a contract. It was felt

that this information did not include details about potential mid-contract price rises. If this information was included in the small print, it was unlikely to be read. It was felt that it was a good idea to provide the information in pounds and pence, rather than percentages. Some suggested that they struggle to work out percentages and would be unlikely to ask for clarification.

**‘This is a really good thing.’**

**‘At last you’d know where you stand. Not going to get a shock.’**

**‘They should be telling you. Preparing you.’**

**‘When you sign up to a deal, it should be that deal. You need to know at point of purchase.’**

**‘I want to know that my costs for 24 months will be this.’**

**‘Much better to know upfront so you know what you are dealing with and can budget for it.’**



**Consumer Council for Northern Ireland**  
**Seatem House, 28-32 Alfred Street**  
**Belfast**  
**BT2 8EN**

**Freephone: 0800 121 6022**

**Email: [contact@consumercouncil.org.uk](mailto:contact@consumercouncil.org.uk)**

**Website: [www.consumercouncil.org.uk](http://www.consumercouncil.org.uk)**