

Broadband and Bundled Communications Services - UK - February 2021

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This report looks at the following areas:

- The impact of COVID-19 on the broadband and bundled communications services market and on consumer behaviour.
- Market size and forecast of the broadband and bundled communications market.
- Innovations of companies operating in the market, including new product launches and investments in satellite and Gigabit broadband.
- Key advertising activity, including top campaigns by providers in the broadband and bundled communications market.
- Consumer use of key broadband suppliers and levels of satisfaction with them.
- Consumer take-up of bundled communications services and attitudes towards broadband and bundled communications services.

Satisfaction levels with consumers' current broadband provider are high. Just 4% would say they are "dissatisfied" with the service they receive from their provider and only 1% would say they are "very dissatisfied.". Beyond ensuring no significant service outages, there is not a great deal that providers need to do to ensure levels of satisfaction remain high – although this is also an indication that inertia is a significant barrier to switching providers.

11% of consumers who are internet bill payers have been with their provider for less than 12 months, and of those, 29% say that COVID-19/coronavirus caused them "to upgrade my broadband connection to a faster service". However, of the 89% who have been with their provider longer than 12 months, over one in five (21%) say they have considered upgrading their broadband connection since COVID-19 started.

43% of all consumers say that "It is better to stick with what you know when it comes to broadband providers". Also, 37% say that "concerns over loss or interruption of service(s) have put me off switching providers in the past". The cautious approach may in part be down to consumers feeling a loss more



"Broadband connections have provided a vital service to consumers throughout the pandemic, underpinning both work and entertainment activities. As a result, COVID-19 is likely to be a catalyst driving engagement with their broadband service and some will look to future-proof their connections by upgrading to contracts with faster speeds."

– Joe Birch, Consumer Technology Analyst

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acutely than any potential gain they may see from changing a provider, which can put off active shopping around to find better deals.

Auto-switching tools are successfully deployed in other markets for insurance and utilities and one for telecoms services could gain traction. 52% say that a tool to automatically find and switch to cheaper deals with equivalent services would be appealing, which could help those overwhelmed by choice navigate the market better.

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