

# Ofcom Consumer Panel Research Quantitative Research Findings

## Focus on England






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## Report outline

- This report details the findings for residential consumers in **England**, and compares these with measures for Scotland, Wales and Northern Ireland
  - the overall UK average is also shown, but findings for England will not differ significantly from this measure due to the relative size of the population of England
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

## Profile of groups of interest by nation

Figures in **bold** indicate where the incidence of a group is significantly higher than for the UK as a whole or in comparison to other nations in the UK. Final row and final column indicate the number of interviews conducted for the Consumer Panel survey.

	England 	Scotland 	Wales 	Northern Ireland 	UK TOTAL 	<i><b>INTERVIEWS CONDUCTED</b></i>
Older people (aged 65 plus)	16%	16%	18%	14%	16%	<b>461</b>
Rural	13%	13%	<b>19%</b>	<b>55%</b>	15%	<b>398</b>
Non-white	<b>7%</b>	1%	2%	1%	6%	<b>331</b>
Limiting long term illness/ disability	14%	<b>18%</b>	<b>29%</b>	15%	15%	<b>488</b>
<b>TOTAL NATION SPLIT</b>	<b>84%</b>	<b>8%</b>	<b>5%</b>	<b>3%</b>	<b>100%</b>	
<i><b>INTERVIEWS CONDUCTED</b></i>	<b>1398</b>	<b>426</b>	<b>352</b>	<b>343</b>	<b>2519</b>	

Source: Census 2001 - Office of National Statistics and Ofcom data

## Summary of key findings for consumers in England

### *Understanding*

- Whilst over three-fifths of consumers in England understand the terms broadband and digital TV (through being able to correctly describe what the terms refer to), just under half of consumers in England understand the term digital radio, and around one in seven understand the term 3G
- Consumers in England are the most likely to understand the term 'digital switchover'

### *Keeping informed*

- Half of all consumers in England keep themselves informed of developments for communications services
- Three in five consumers in England have more than one source of advice or information on communications services

### *Ownership, use and satisfaction*

- Almost all consumers in England have a landline at home, four in five have a mobile phone they use personally, three in five have digital TV and over half have internet access at home
- Consumers in England are the most likely to have broadband access to the internet at home
- Consumers in England are more likely than the other nations to have switched mobile phone network, but otherwise do not differ significantly in terms of switching suppliers for their communications services

# Most understand digital TV and broadband, but few have heard of 3G

Aware of each communications term

Not aware

Misinformation

Can't describe

Understand

Broadband



ENGLAND

UK AVERAGE

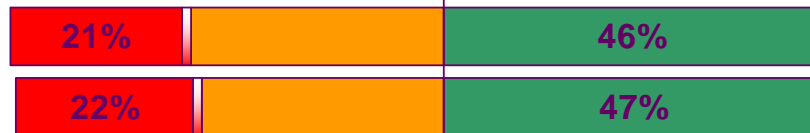
Digital TV



ENGLAND

UK AVERAGE

Digital radio



ENGLAND

UK AVERAGE

3G



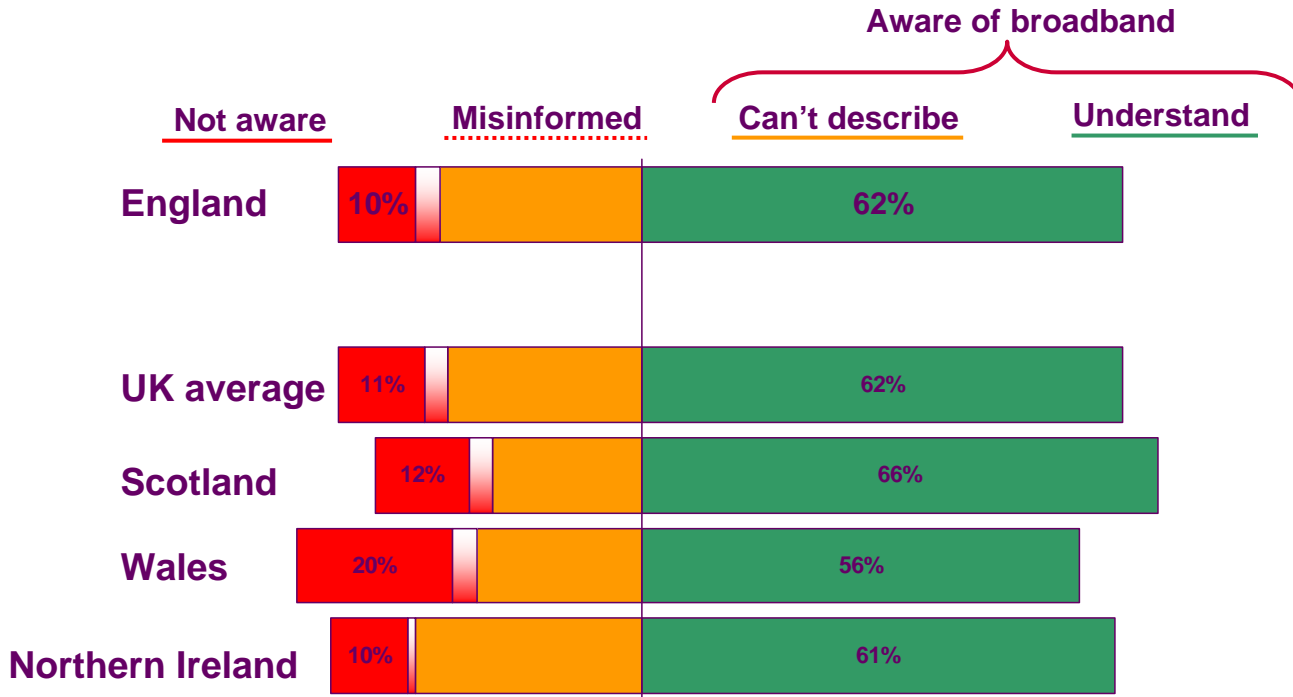
ENGLAND

UK AVERAGE

↓ ↑ Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in England (1398) and UK overall (2519)

## Three in five understand the term broadband

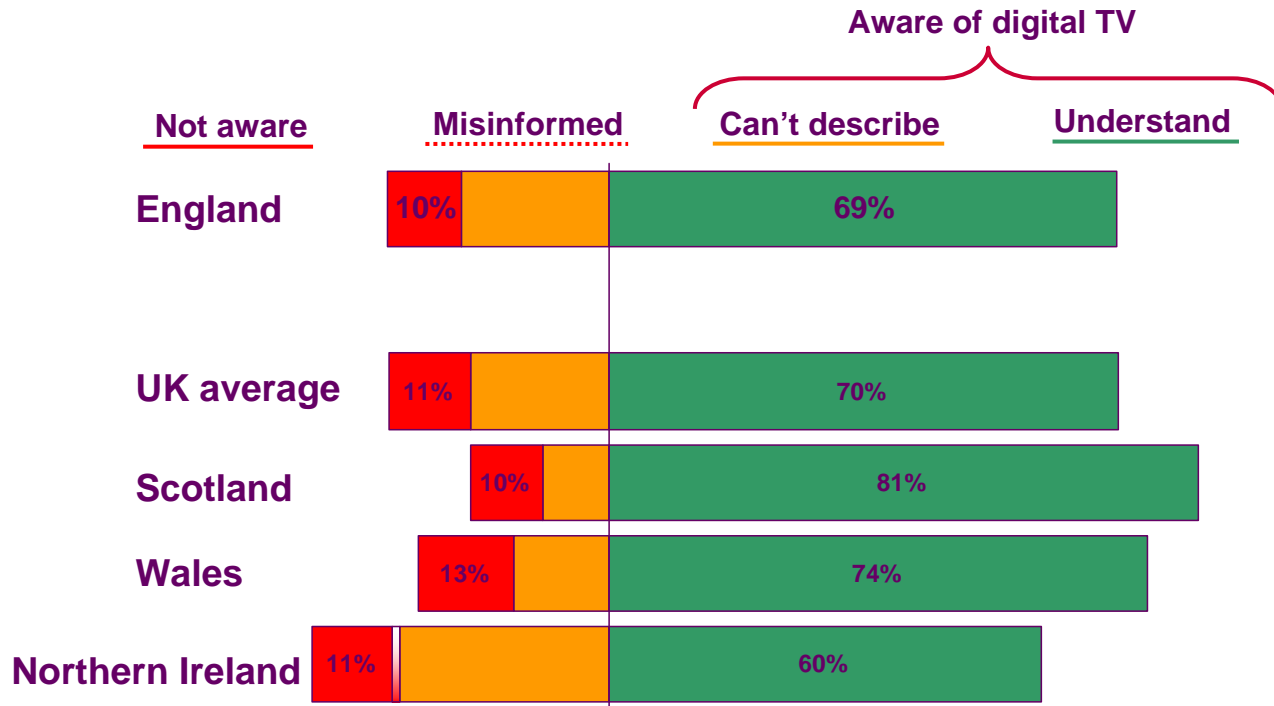


Levels of awareness and understanding of the term broadband do not differ significantly across England, Scotland and Northern Ireland, but consumers in Wales are significantly less likely to have heard of broadband

↓ ↑ Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

## Two-thirds understand the term digital TV

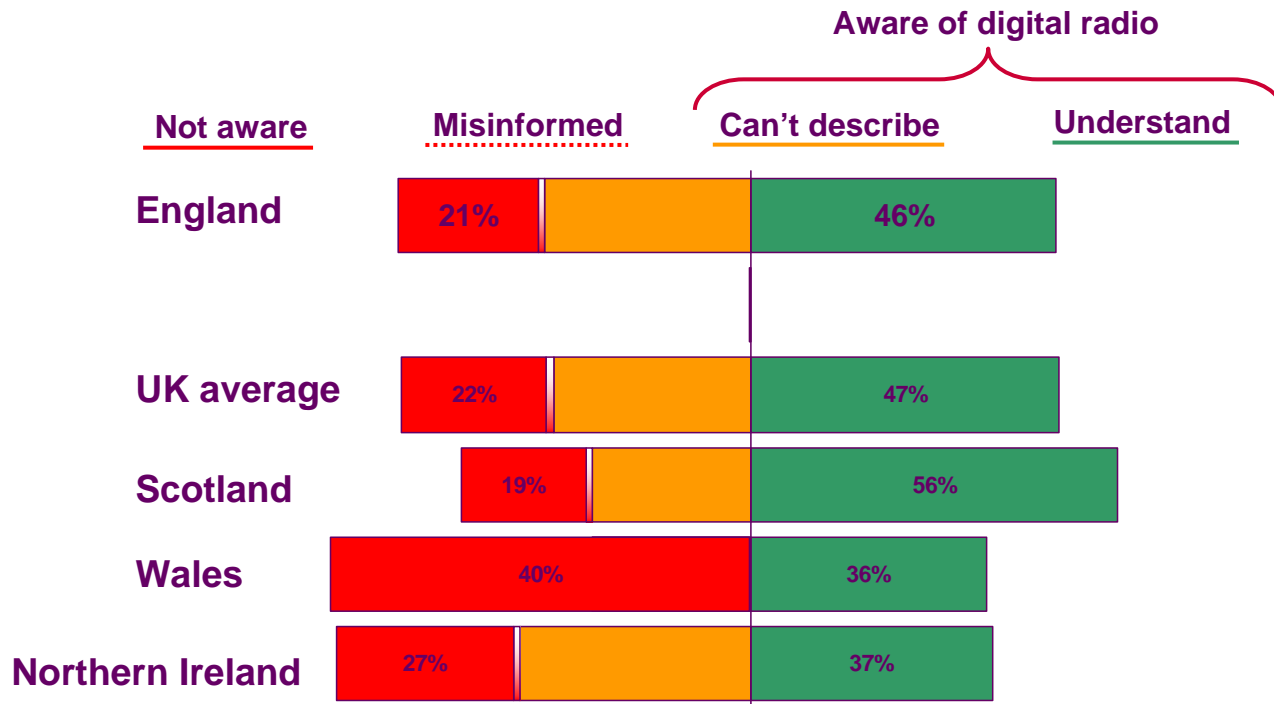


Whilst levels of awareness of digital TV do not differ significantly across the nations, consumers in Scotland and Wales are more likely to understand the term through correctly describing what digital TV is



Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

## A minority understand the term digital radio

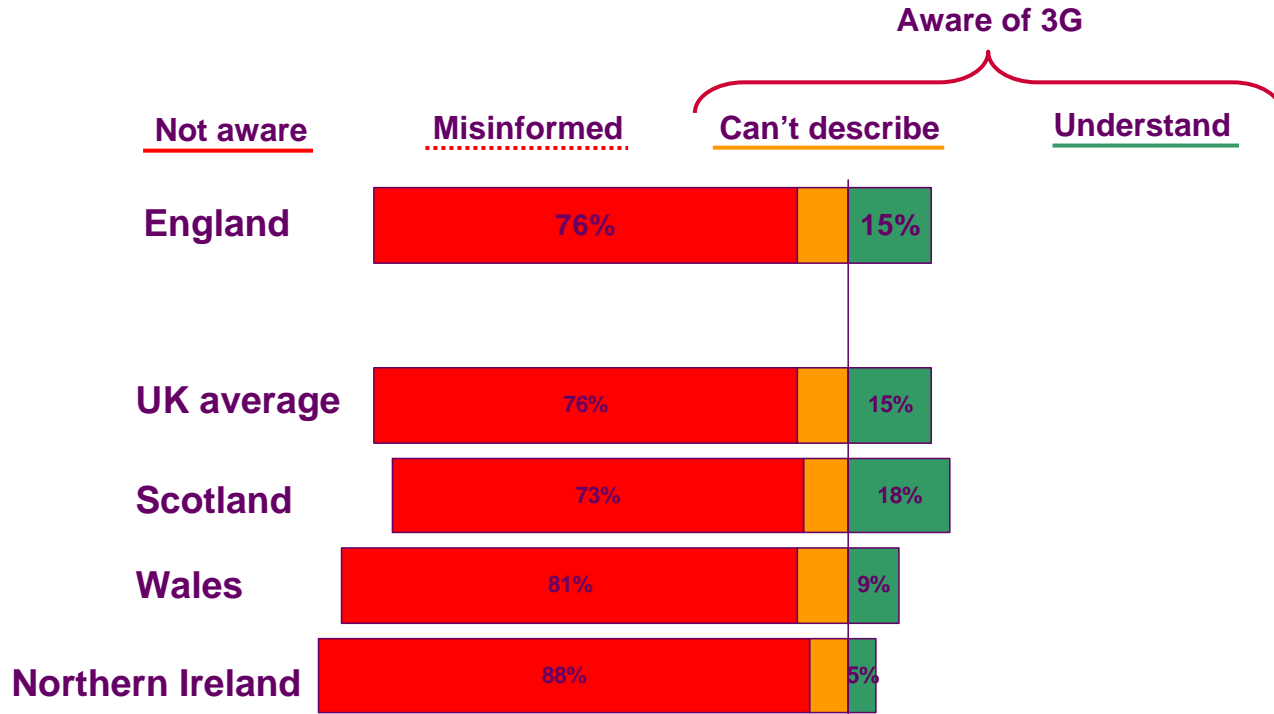


Whilst awareness levels for the term digital radio do not differ between consumers in England and those in Scotland, consumers in England are less likely to understand the term. Understanding of digital radio does, however, exceed the levels for Wales and Northern Ireland.



 Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

## Three in four are unaware of the term 3G

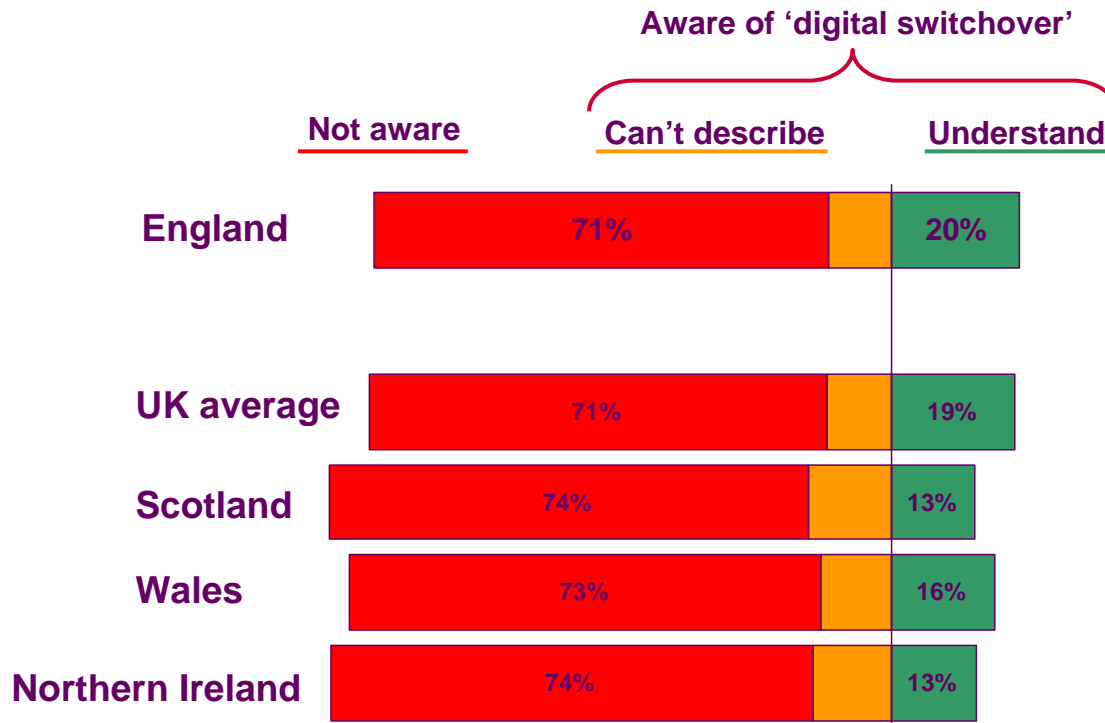


Levels of awareness and understanding of 3G are broadly similar for consumers in England and Scotland, and significantly lower for consumers in Wales and Northern Ireland

↓ ↑ Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

## More likely to understand 'digital switchover' than the other nations

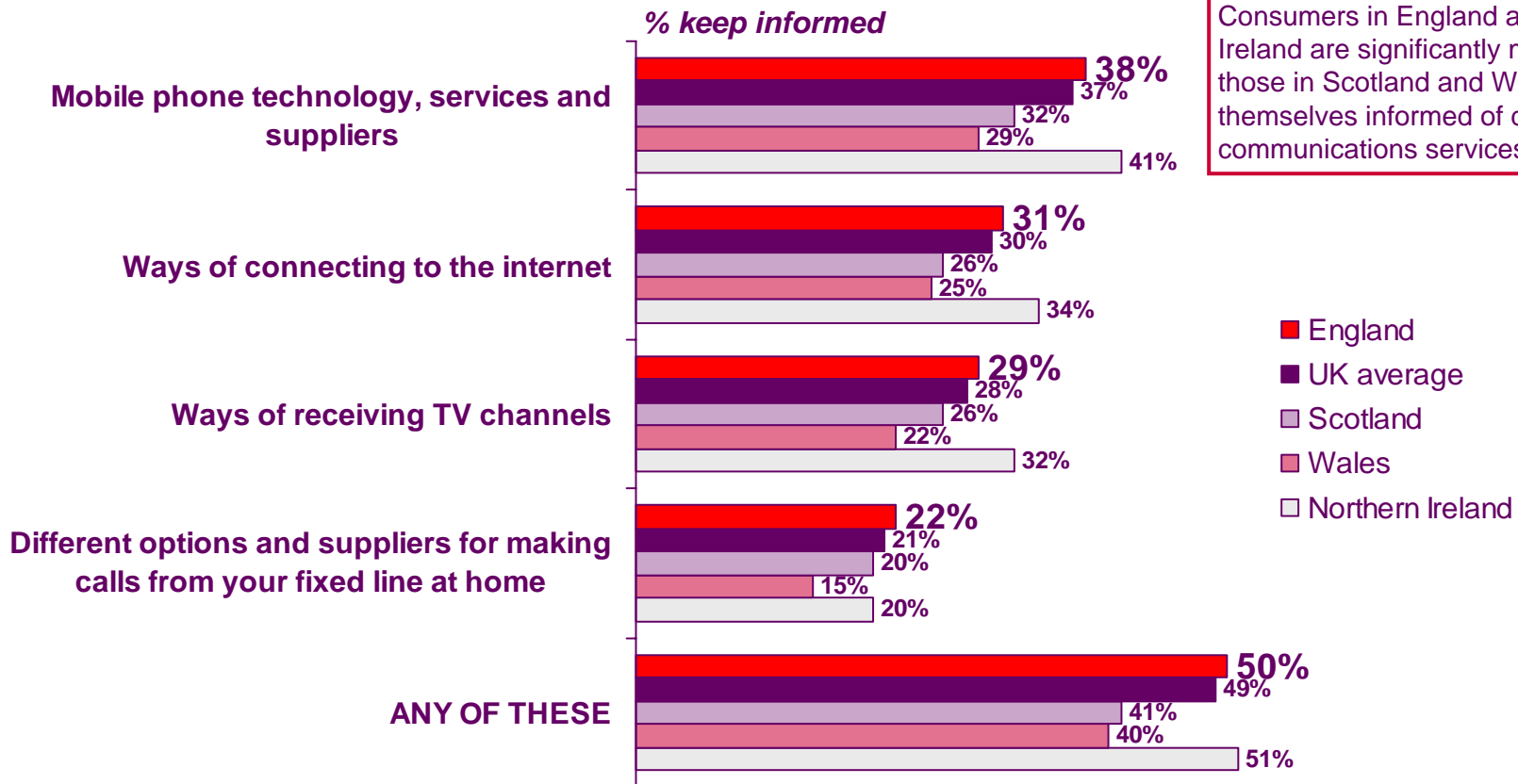


Consumers in England are the most likely to have heard the term 'digital switchover' and to understand what the term means. Levels of awareness and understanding are lowest for consumers in Scotland and Northern Ireland.



Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

## Half keep themselves informed of developments in any communications services



Consumers in England and Northern Ireland are significantly more likely than those in Scotland and Wales to keep themselves informed of developments for communications services

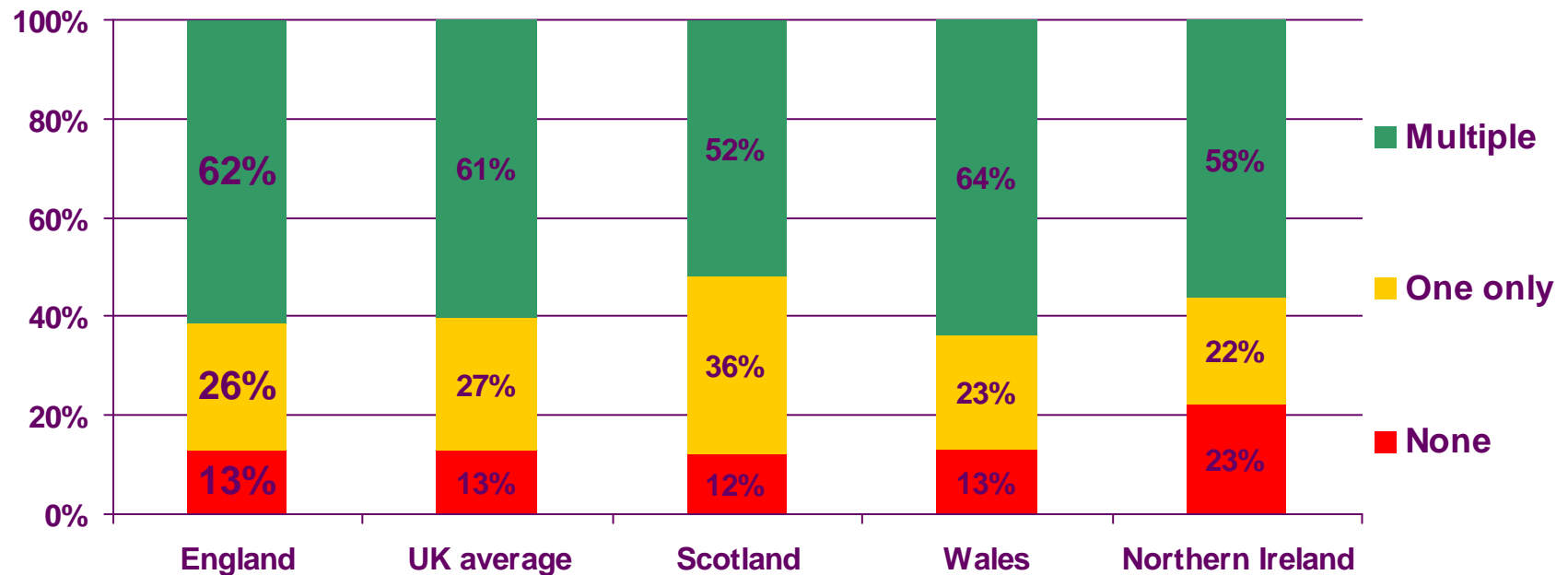


Indicates significantly lower or higher levels of keeping informed compared to the UK average

Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

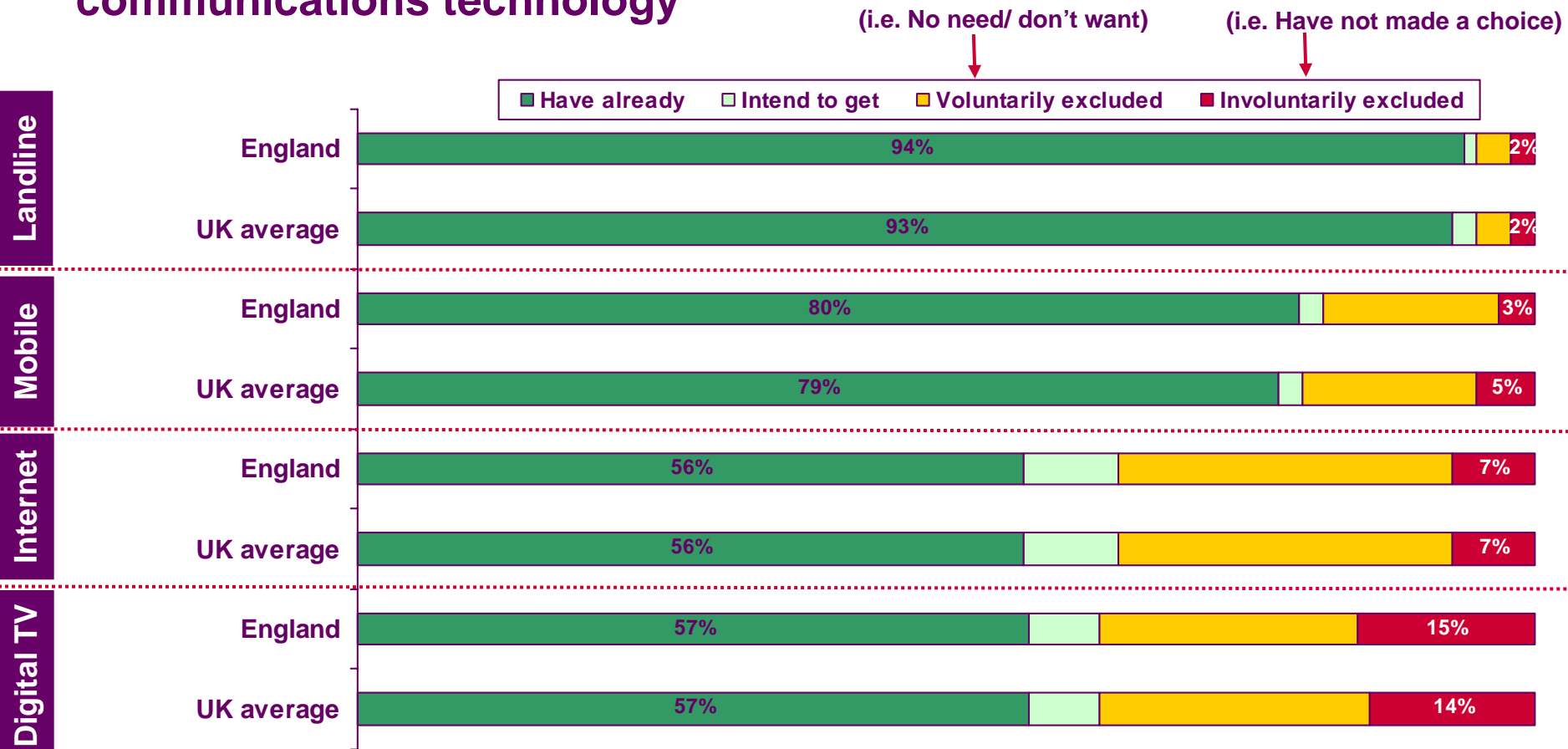
## Three in five consumers have more than one source of advice or information on communications services

Consumers in England and Wales are the most likely to have multiple sources of advice or information



Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

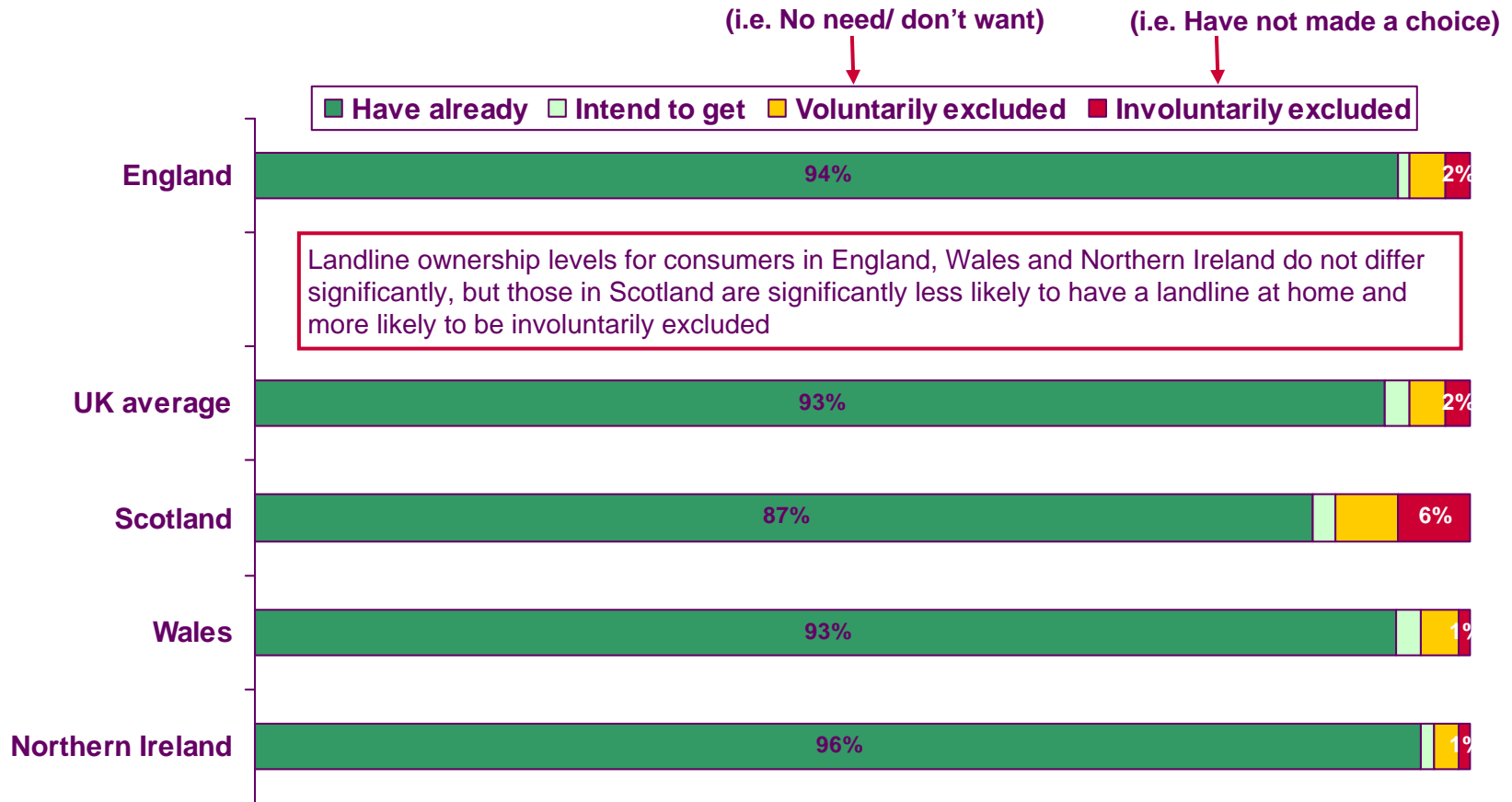
## Similar levels of ownership of and exclusion from home communications technology



Base : All respondents in England (1398) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

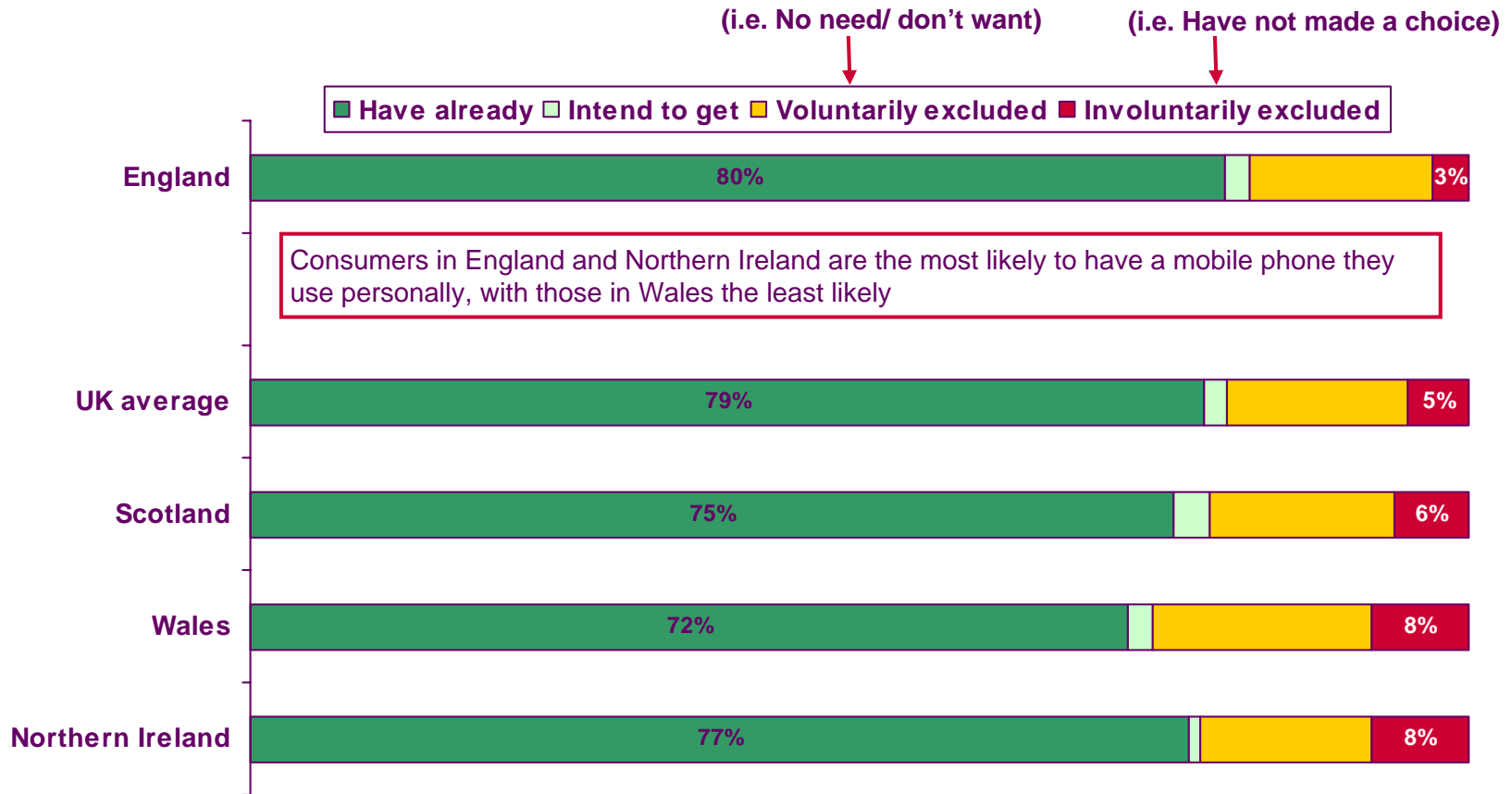
## Almost all have a landline at home



Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

↑↓ Indicates significantly lower or higher levels of ownership

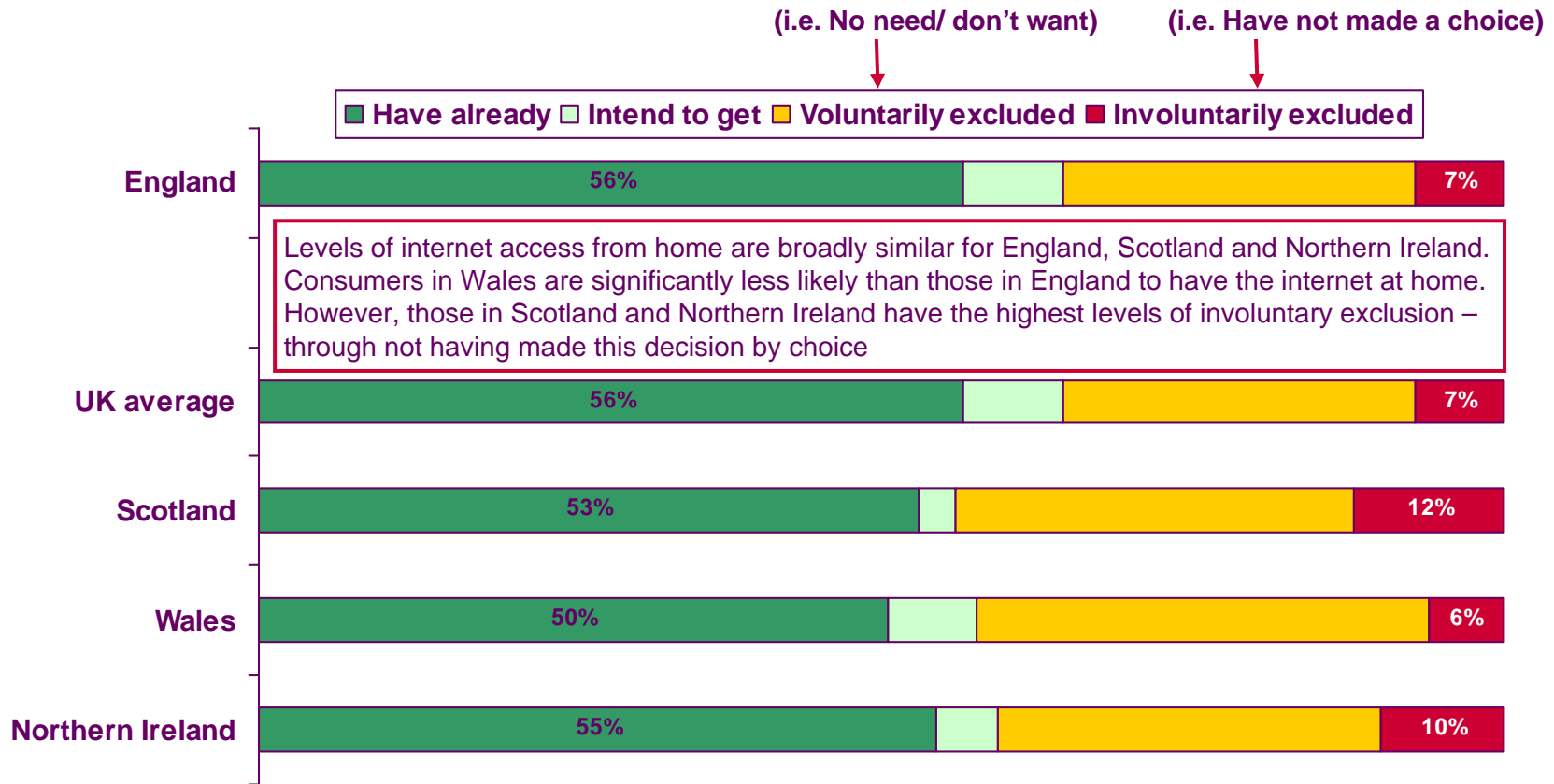
## Four in five have a mobile phone they use personally



Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

↑↓ Indicates significantly lower or higher levels of ownership

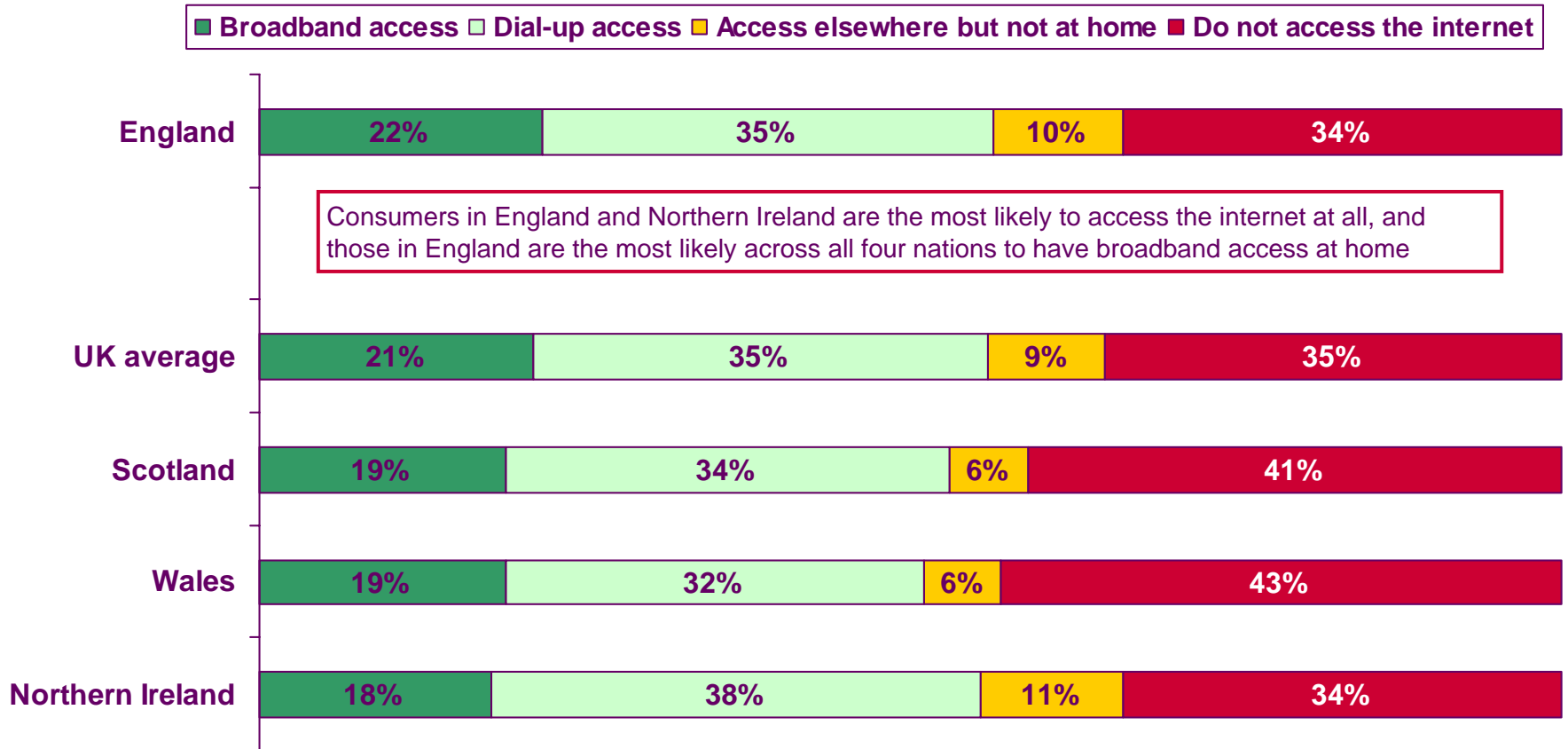
## Over half have internet access at home



Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

↑↓ Indicates significantly lower or higher levels of ownership

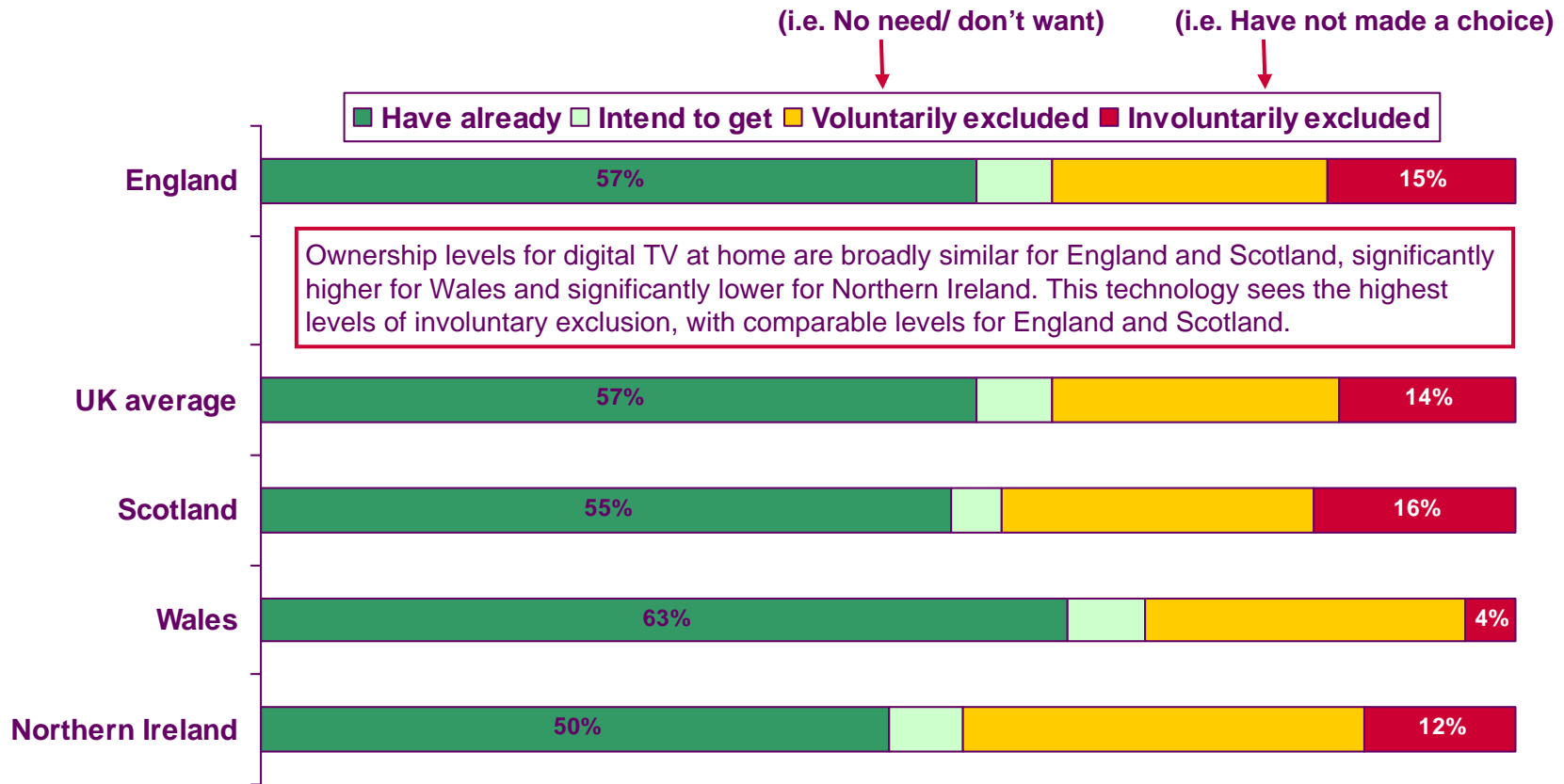
## Broadly similar levels of broadband access at home



Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

↑↓ Indicates significantly lower or higher levels accessing the Internet

## Close to three in five have digital TV at home

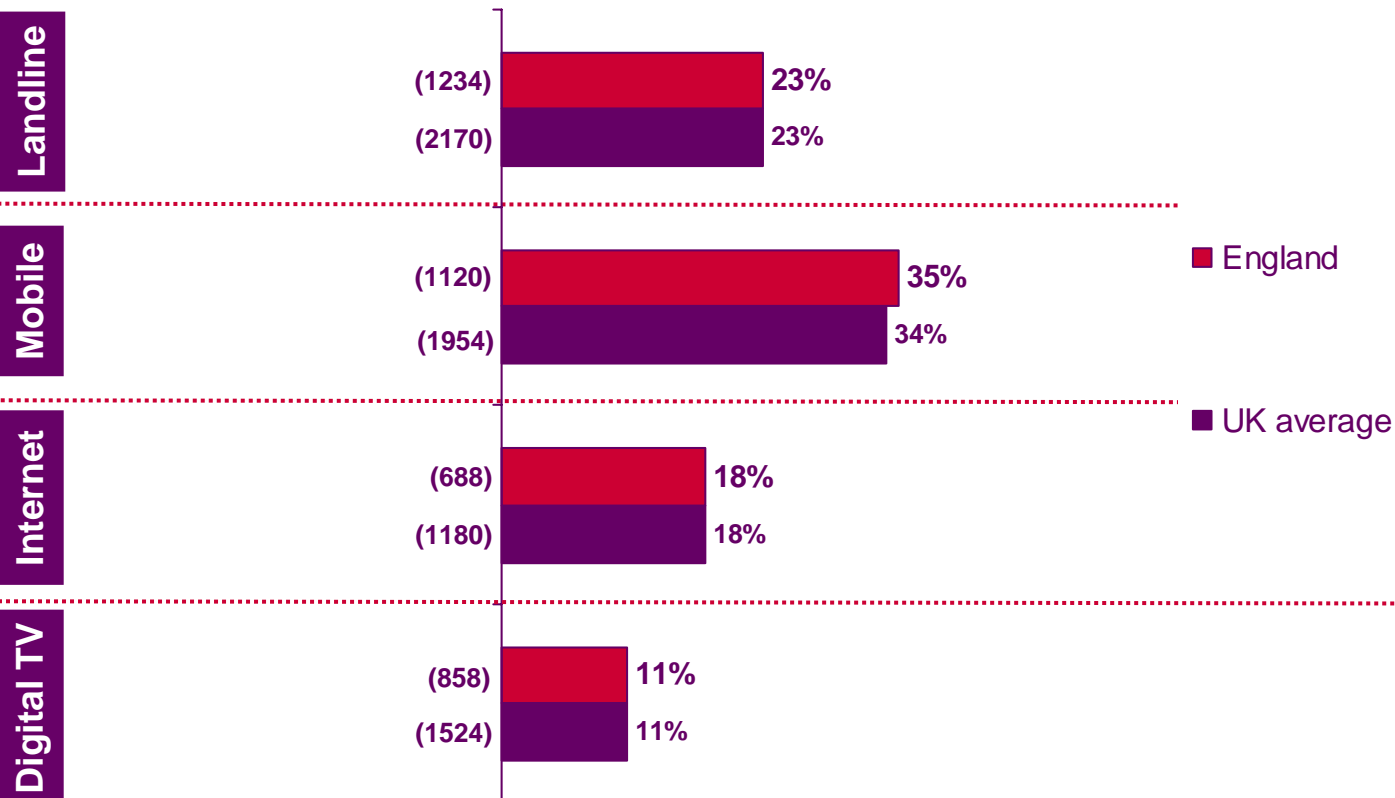


Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)

↑↓ Indicates significantly lower or higher levels of ownership

## Switching suppliers is most common for mobile phone network and least common for digital TV

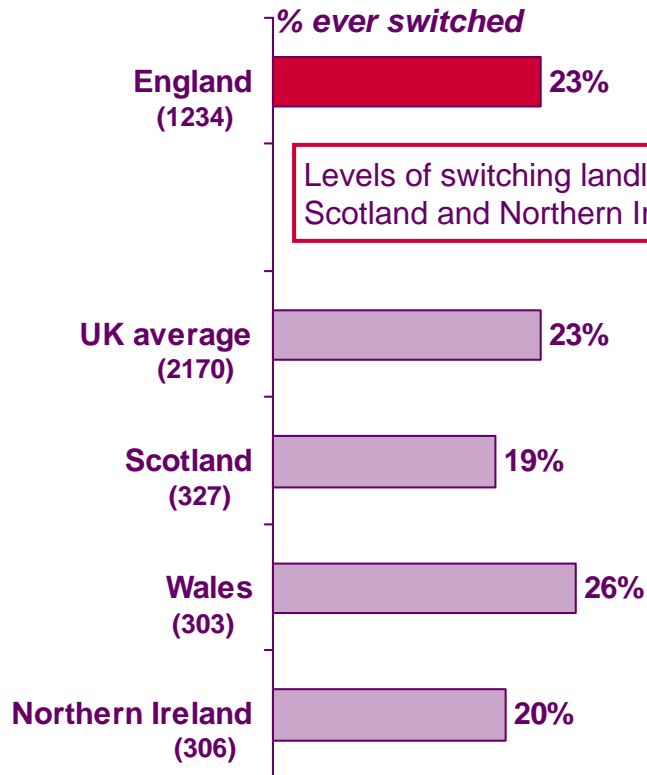
*% ever switched*



Base : All with access to each service at home

Indicates significantly lower or higher levels of switching

## One in four have ever switched supplier for their landline service



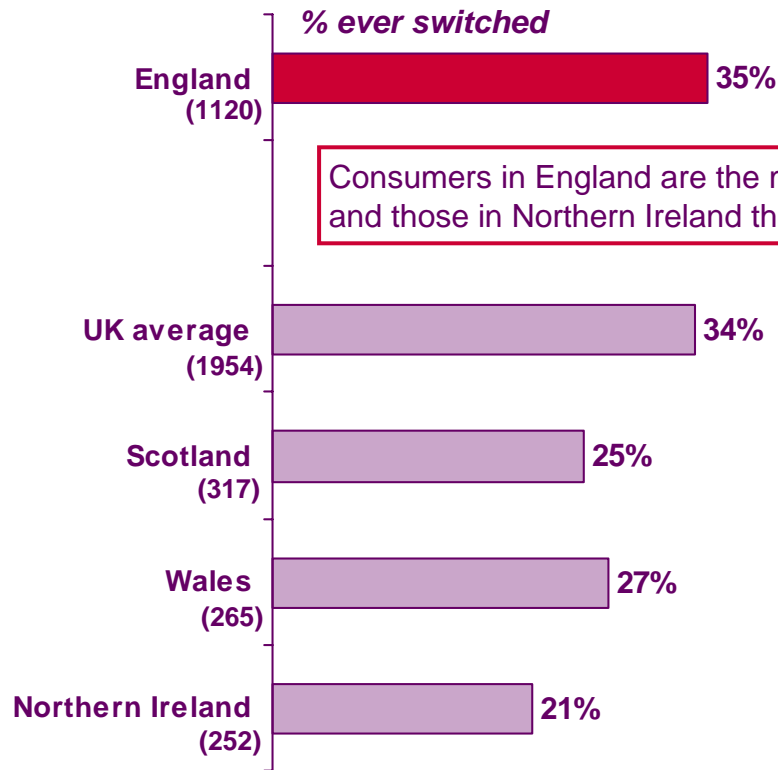
Levels of switching landline supplier are broadly similar for consumers in England, Scotland and Northern Ireland, and higher for consumers in Wales

Landline

Base : All with a landline at home

 Indicates significantly lower or higher levels of switching

## One in three have ever changed mobile phone network



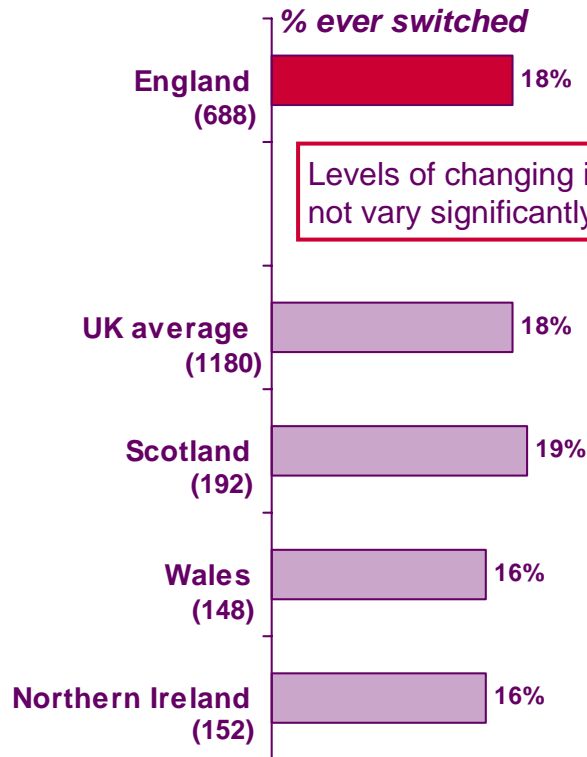
Consumers in England are the most likely to have ever changed mobile phone network, and those in Northern Ireland the least likely

Mobile

Base : All with a mobile phone

Indicates significantly lower or higher levels of switching

## One in five have ever changed internet service provider

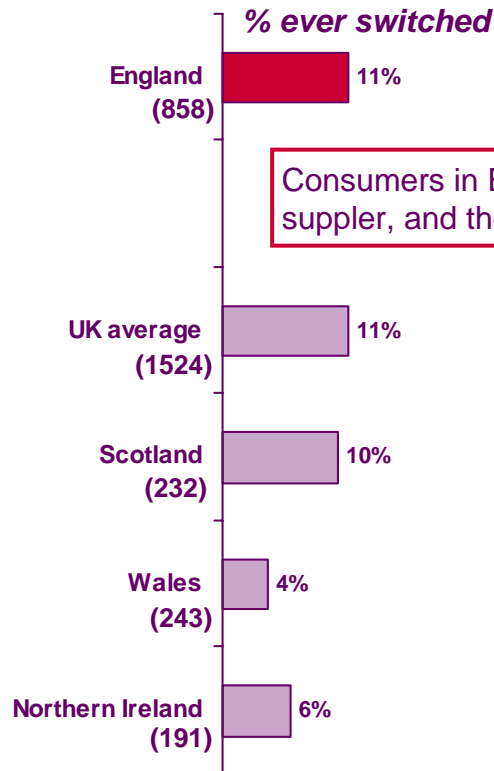


Levels of changing internet service provider amongst those with the internet at home do not vary significantly across the four nations

Base : All with internet access at home

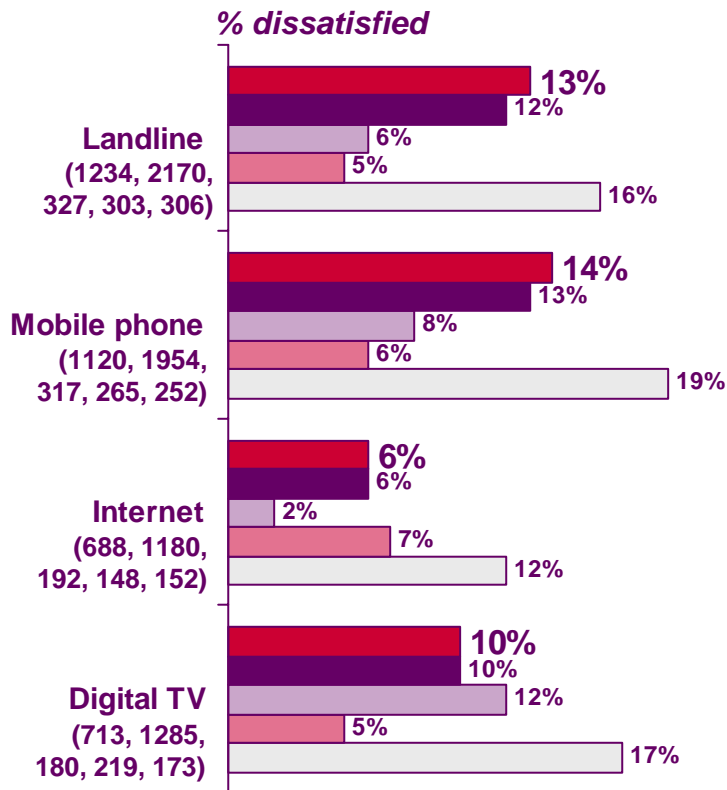
 Indicates significantly lower or higher levels of switching

## Around one in ten have ever changed Digital TV supplier



Consumers in England and Scotland are the most likely to have ever changed digital TV supplier, and those in Wales are the least likely

## Around one in ten are dissatisfied with their landline, mobile phone or digital TV service supplier



Levels of dissatisfaction amongst consumers in England are below those for consumers in Northern Ireland for each of the four communications services, but exceed levels for those in Scotland and Wales for telephony services in particular

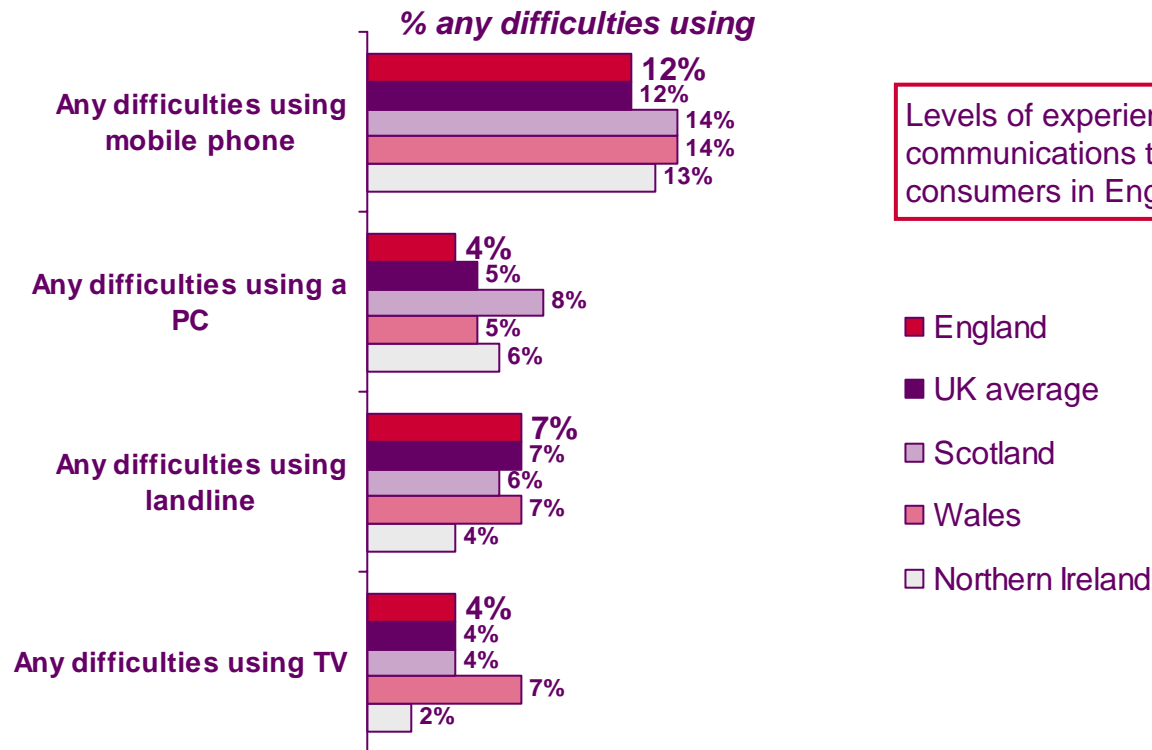
- England
- UK average
- Scotland
- Wales
- Northern Ireland

Base : All with access to each service at home



Indicates significantly lower or higher levels of dissatisfaction compared to the UK average

## More likely to experience any difficulties using a mobile phone than using other home communications technologies



Levels of experiencing any difficulties using home communications technologies tend to be rather lower for consumers in England compared to the other nations.

- England
- UK average
- Scotland
- Wales
- Northern Ireland

Base : All respondents in England (1398), Scotland (426), Wales (352), and Northern Ireland (343)



Indicates significantly lower or higher levels reporting any difficulties using compared to the UK average