CONSUMER PANEL

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Ofcom Consumer Panel Research Quantitative Research Findings

Focus on low income

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Report outline

- This report compares the findings for residential consumers in low income households (with an annual household income of under £11,500 per year) with those for residential consumers in the **UK overall**

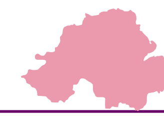
- Differences shown of ±3% (where based on all respondents) are statistically significant

- Where findings for those in low income households are significantly different from the UK average this has been shown using green and red arrows
  - to indicate significantly higher or lower measures for those in low income households

- 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 incidences of a group is significantly higher than for the UK as a whole or in comparison to other nations in the UK. Final row indicates the number of interviews conducted for the Consumer Panel survey.

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

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

Summary of key findings for those in low income households compared to UK average

Understanding

- Less likely to have heard the terms broadband, digital TV, digital radio and 3G
- Less likely to understand the term digital switchover

Keeping informed

- Less likely to keep informed of developments in communications technologies at all
- Less likely to nominate any sources of information or advice on communications services

Ownership, use and satisfaction

- Less likely to have landline, mobile phone, internet, broadband and digital TV
- Less likely overall to have ever switched suppliers for their home communications services
- Less likely to access the internet at all
- Higher levels of involuntary exclusion for landline, mobile phone and the Internet compared to UK average, mostly due to affordability
- Higher levels of involuntary exclusion for digital TV compared to UK average, primarily due to affordability, but also a lack of understanding of the technology and lack of access
- More likely to have any difficulties using a landline or TV
- Less likely to be dissatisfied with the service provided by their digital TV supplier

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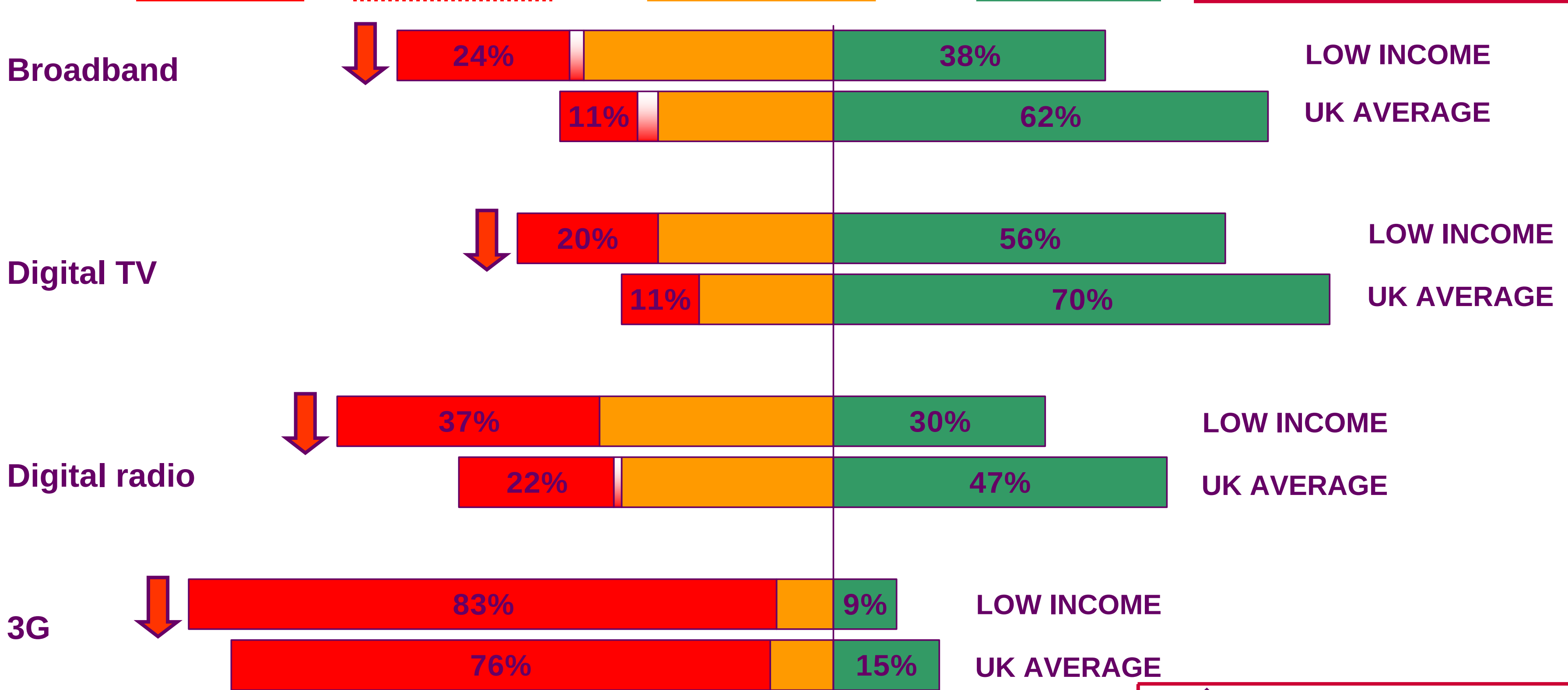
Less likely to have heard of broadband, digital TV, digital radio & 3G

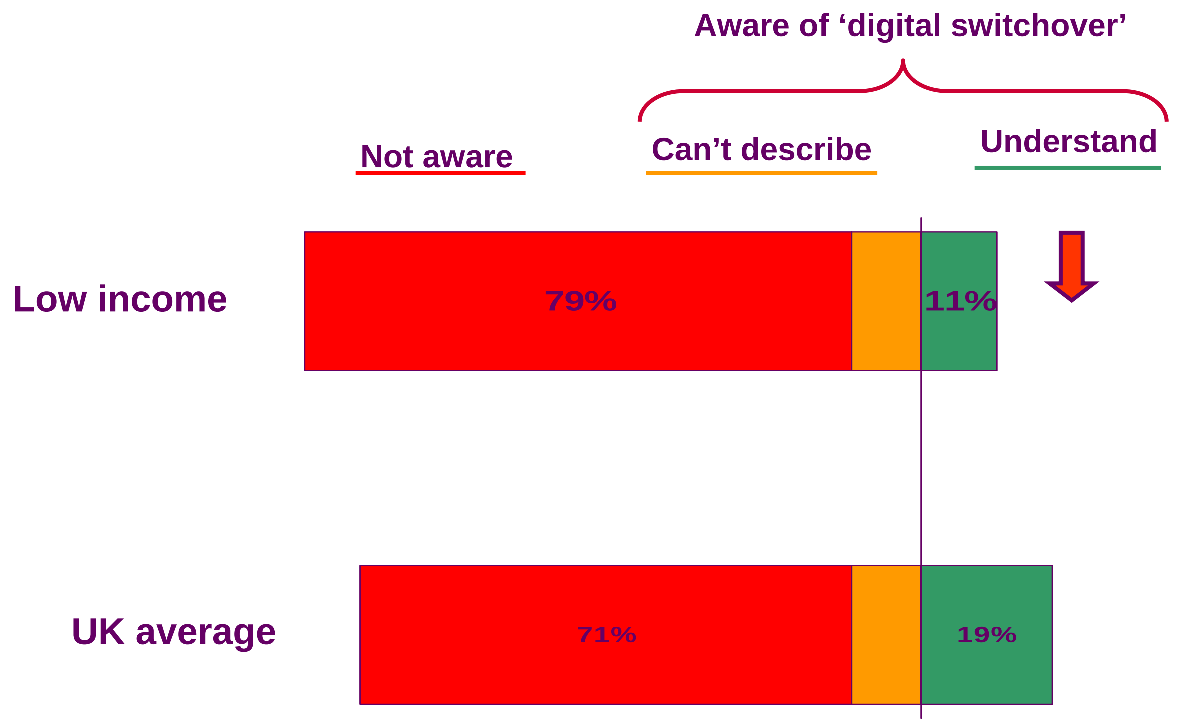
Whilst most people in low income households have **heard of** broadband, digital TV and digital radio, they are significantly less likely to understand the terms through being able to describe what they refer to. Fewer than one in ten low income households have heard of 3G.



Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in low income households (1013) and UK overall (2519)

Less likely than UK average to understand 'digital switchover'

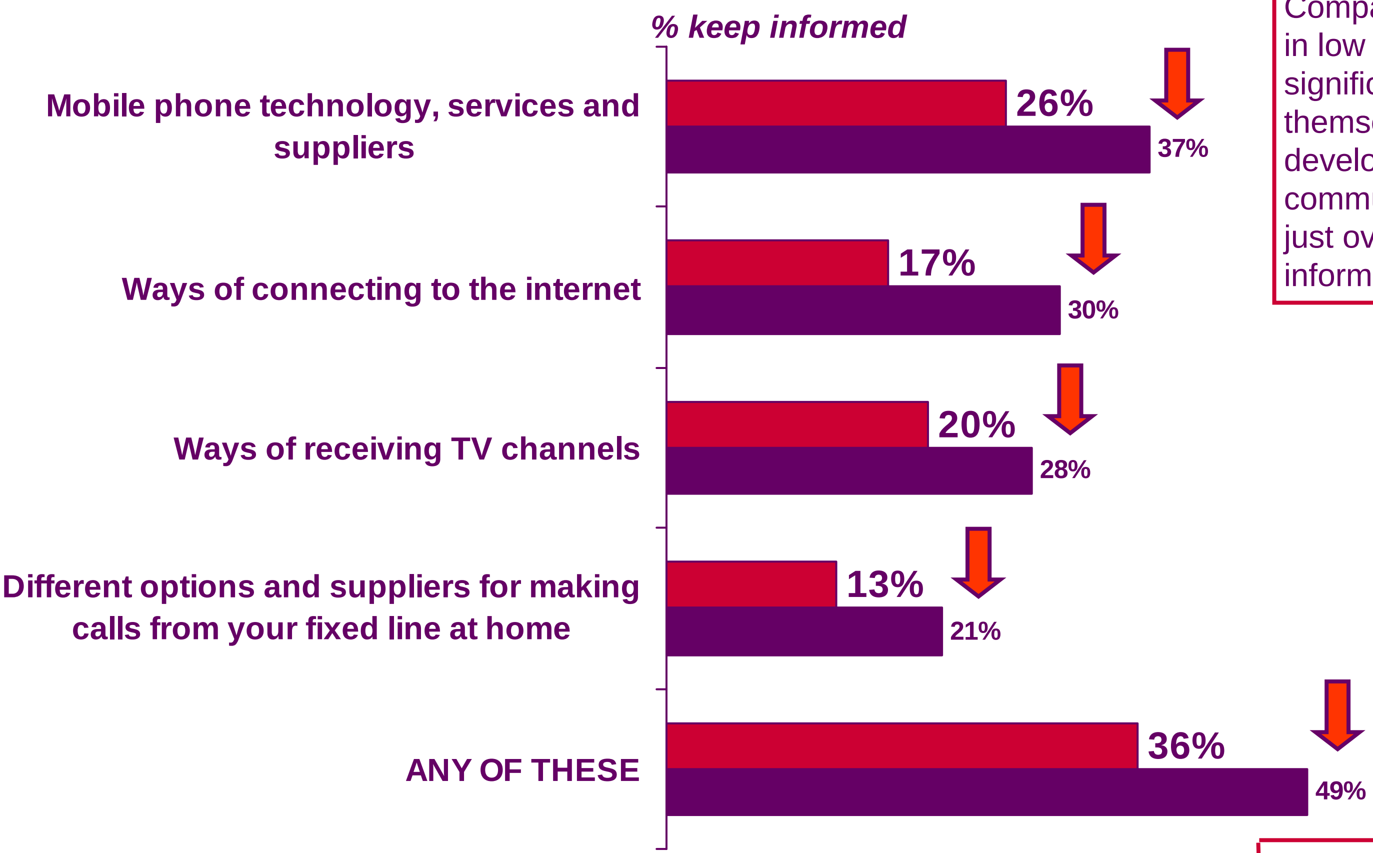


•One in ten people in low income households are able to correctly describe what the term 'digital switchover' refers to, and around eight in ten have not heard the term

Indicates significantly lower or higher levels of understanding

Base : All respondents in low income households (1013) and UK overall (2519)

Significantly less likely to keep informed compared to UK average



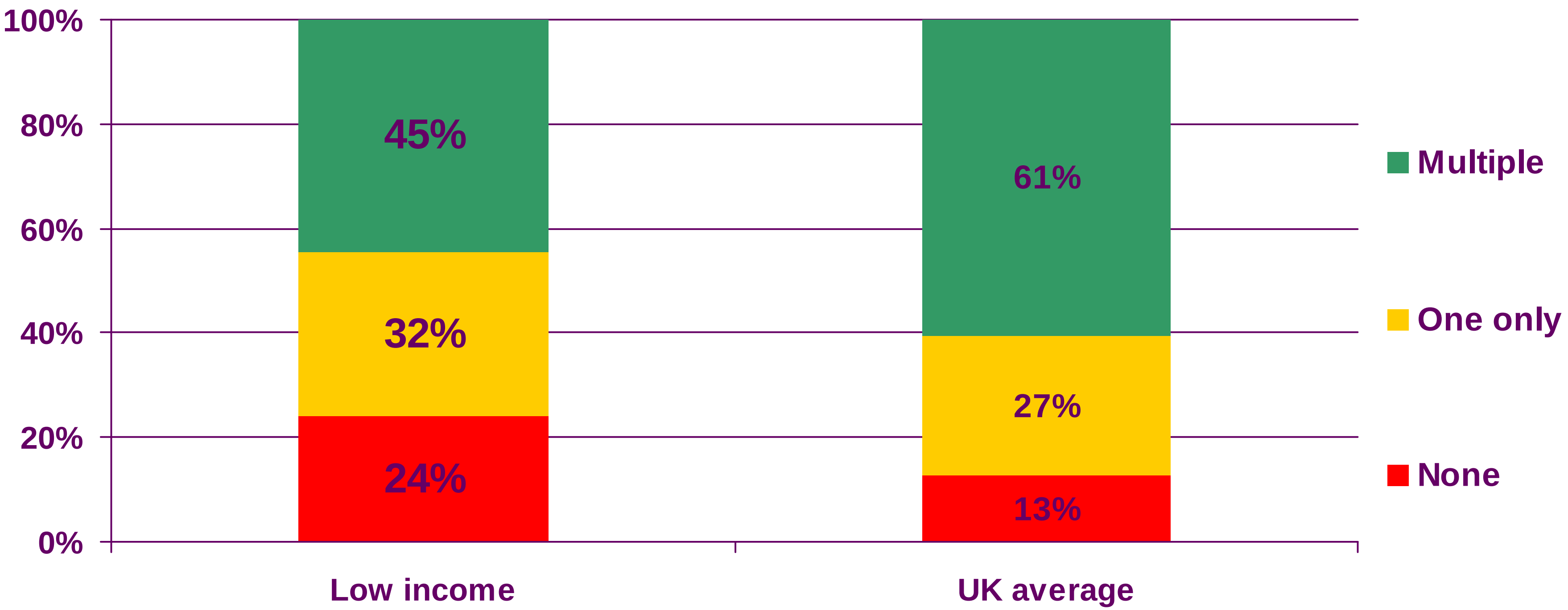
Compared to the UK average, people in low income households are significantly **less** likely to keep themselves informed about new developments for each of the communications technologies, with just over one in three keeping informed about **any**.

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

Base : All respondents in low income households (1013) and UK overall (2519)

Less likely than UK average to recall any sources of advice or information on communications services

Three in four people in low income households recall **any** sources of information, compared to the UK average of close to nine in ten



Base : All respondents in low income households (1013) and UK overall (2519)

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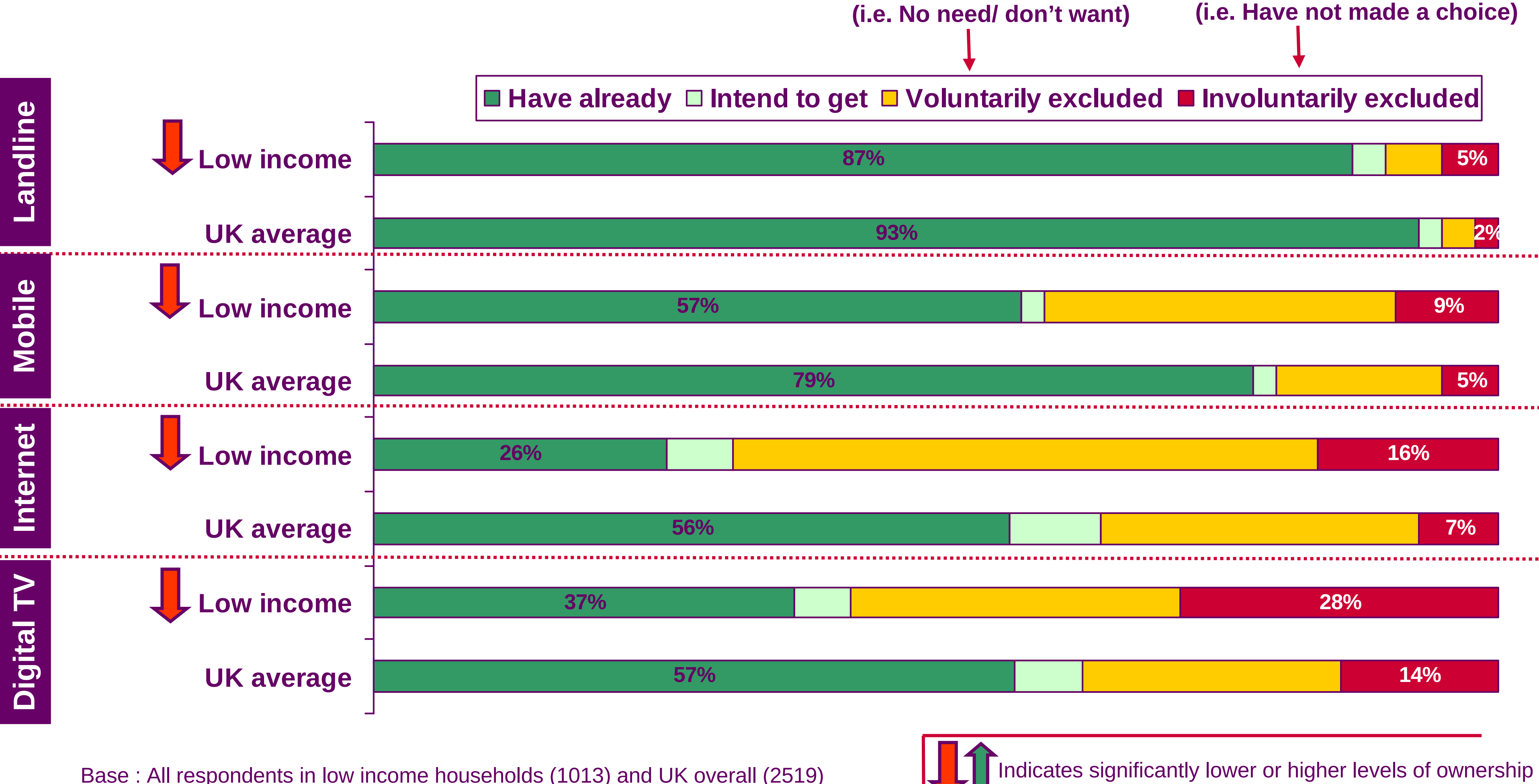
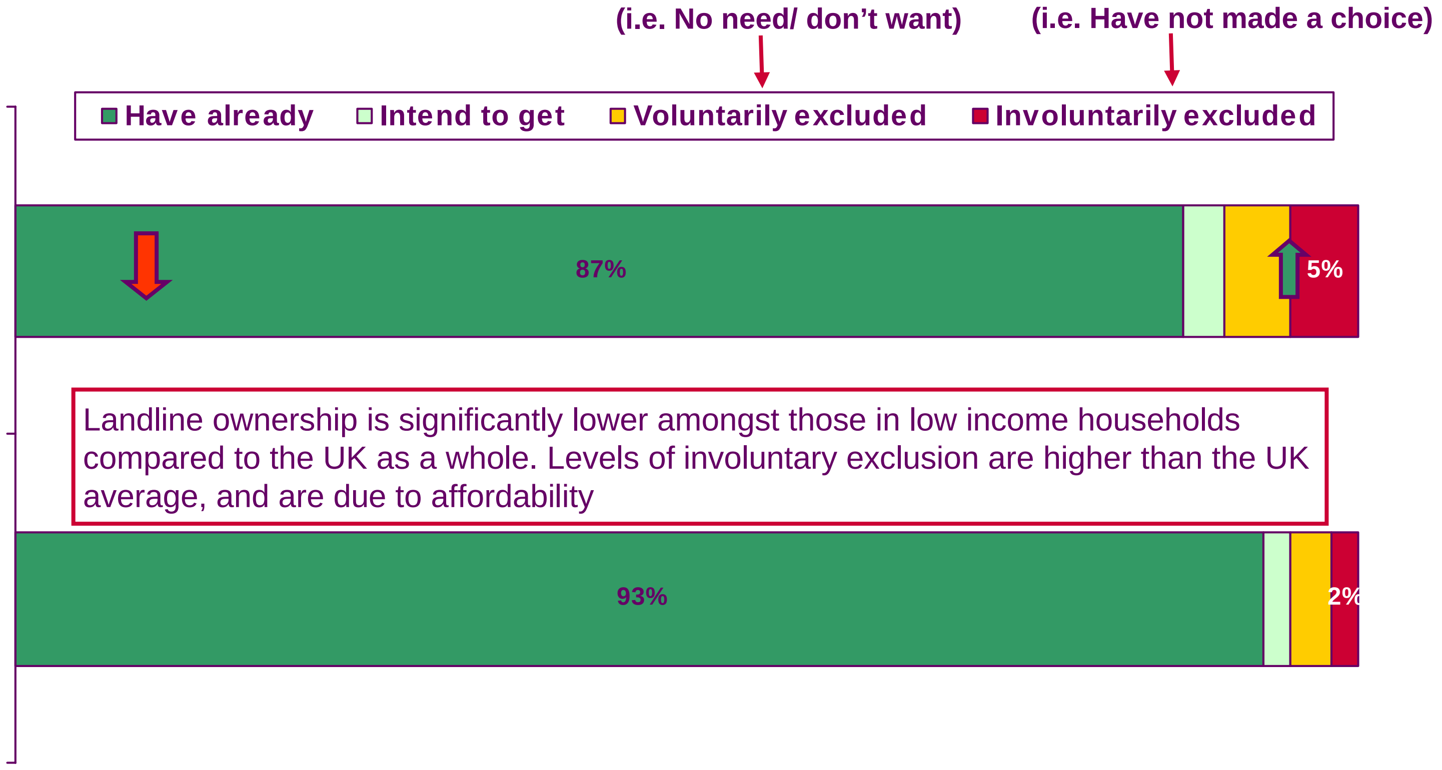
Lower ownership of technologies



Base : All respondents in low income households (1013) and UK overall (2519)

Lower ownership and higher involuntary exclusion

Landline



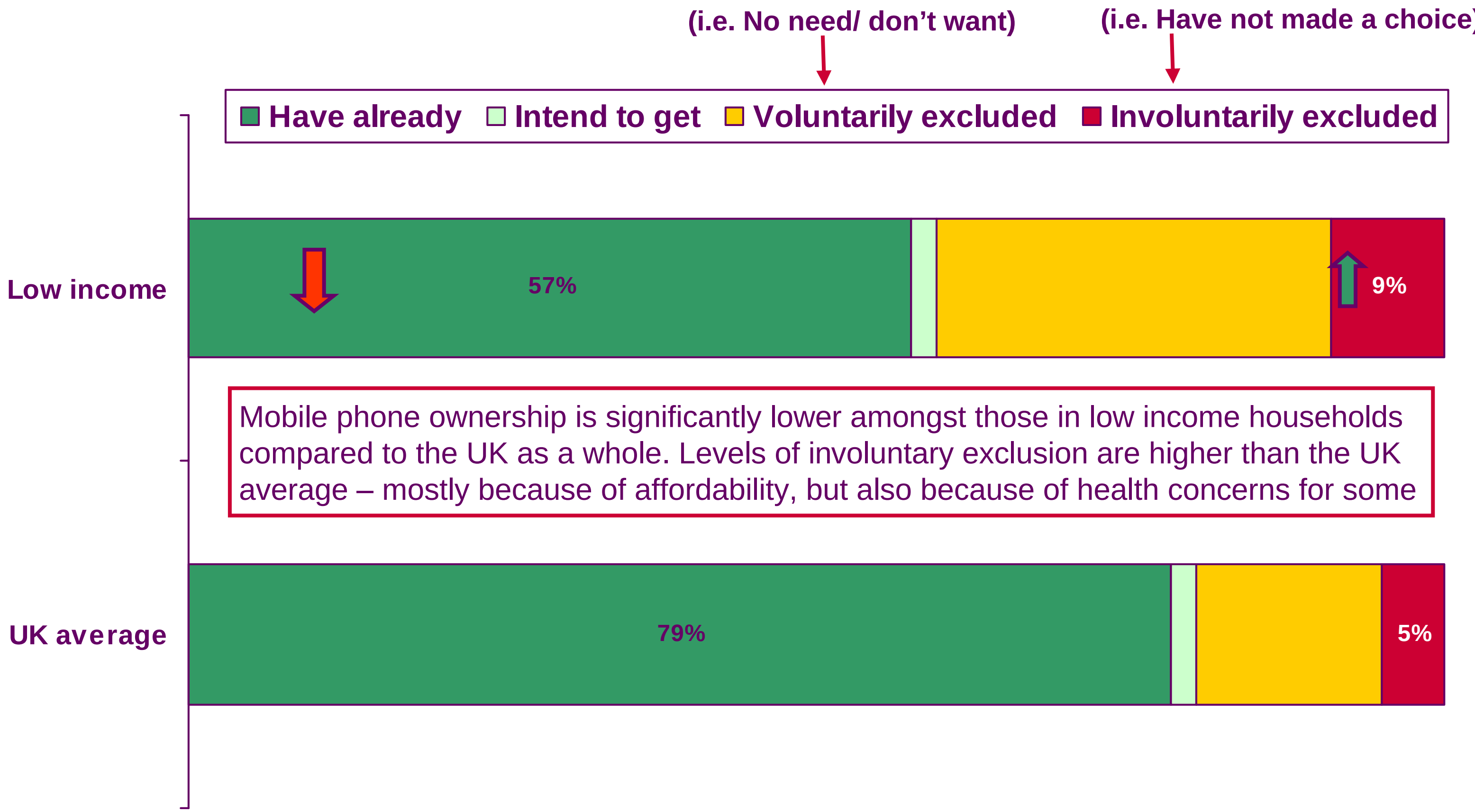
Landline ownership is significantly lower amongst those in low income households compared to the UK as a whole. Levels of involuntary exclusion are higher than the UK average, and are due to affordability

Base : All respondents in low income households (1013) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

Mobile

Lower ownership and higher involuntary exclusion

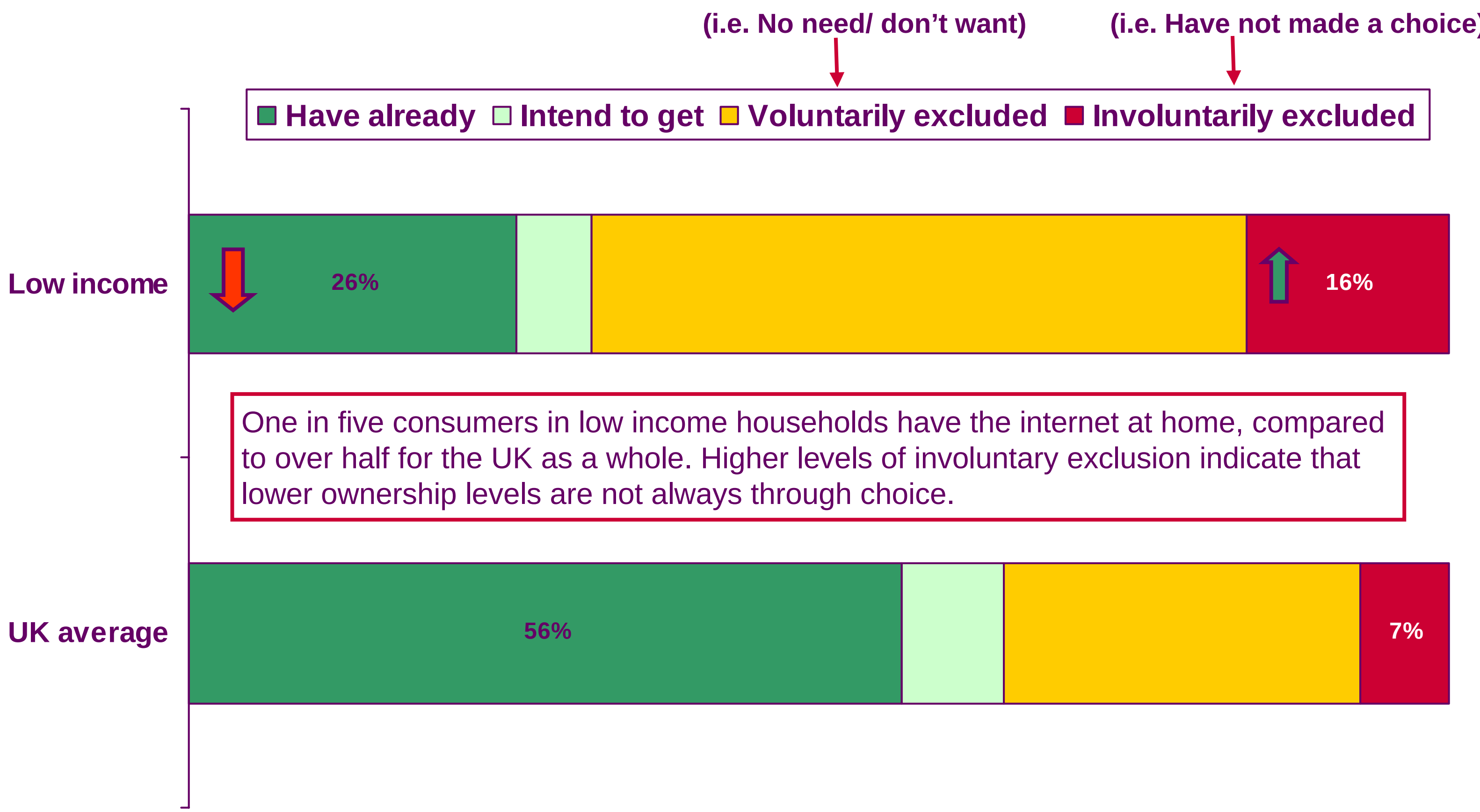


Mobile phone ownership is significantly lower amongst those in low income households compared to the UK as a whole. Levels of involuntary exclusion are higher than the UK average – mostly because of affordability, but also because of health concerns for some

Base : All respondents in low income households (1013) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

Lower levels with internet at home and higher involuntary exclusion



Base : All respondents in low income households (1013) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

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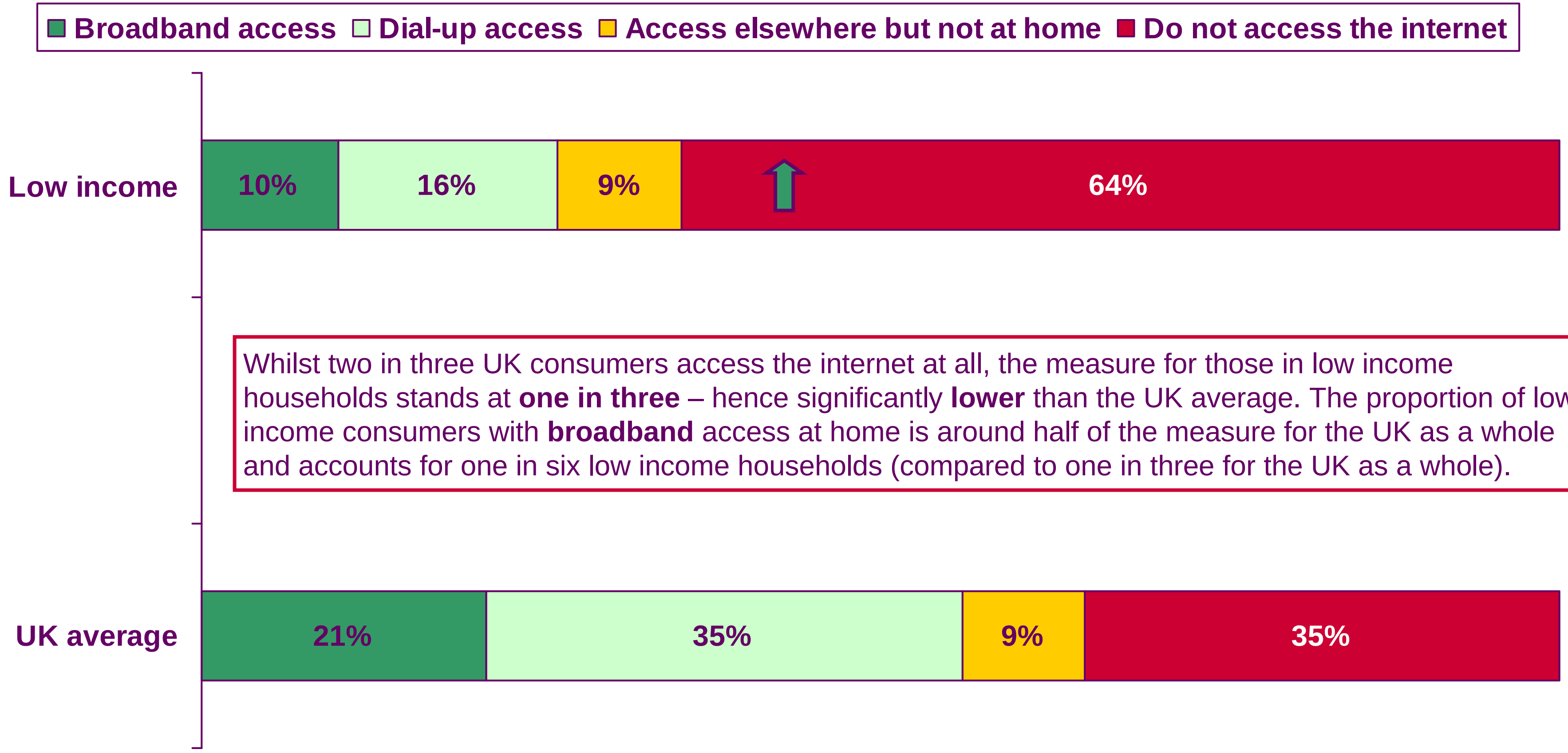
Significantly less likely to access the internet at home or elsewhere



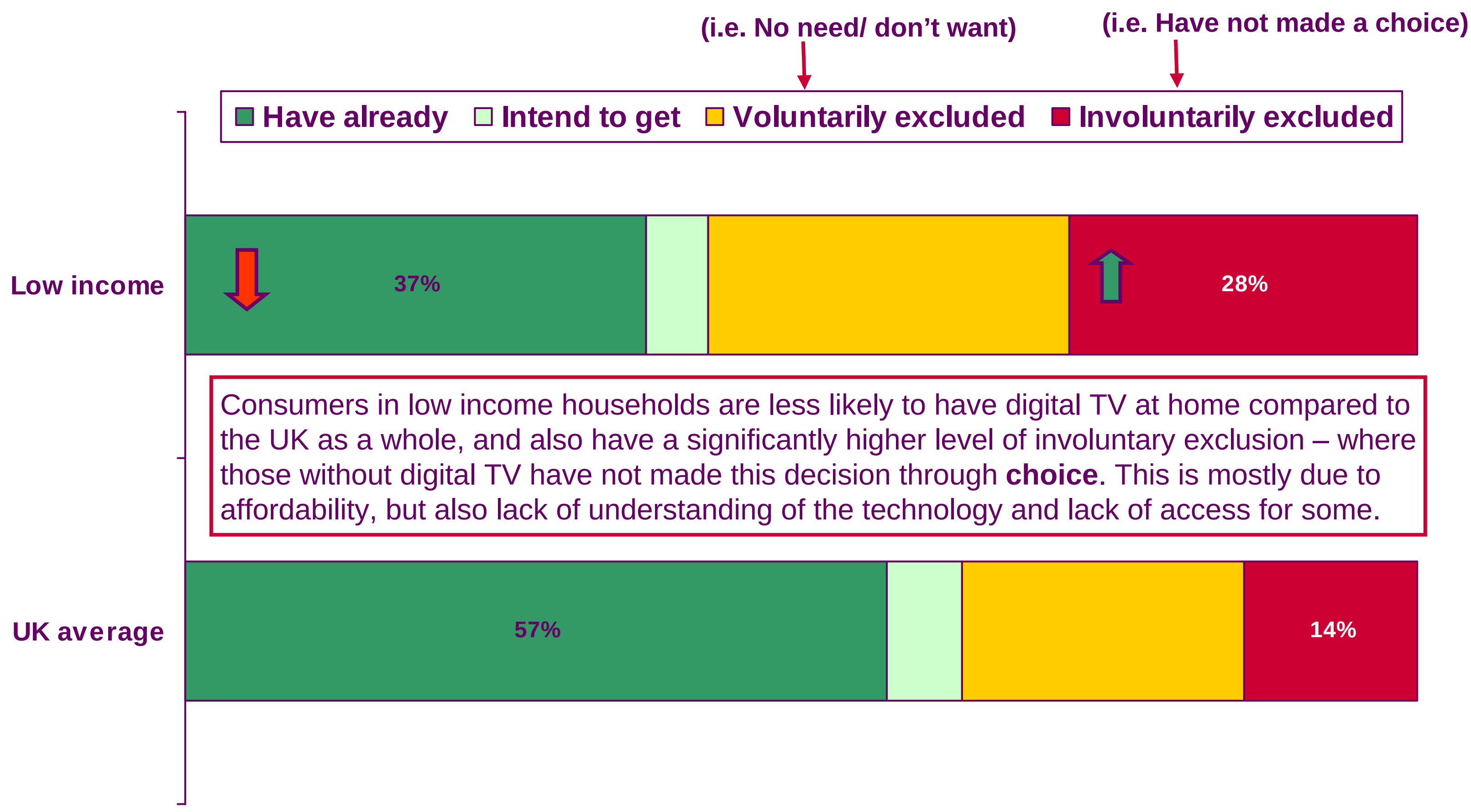
Whilst two in three UK consumers access the internet at all, the measure for those in low income households stands at **one in three** – hence significantly **lower** than the UK average. The proportion of low income consumers with **broadband** access at home is around half of the measure for the UK as a whole and accounts for one in six low income households (compared to one in three for the UK as a whole).

Base : All respondents in low income households (1013) and UK overall (2519)

Indicates significantly lower or higher levels accessing the Internet

Digital TV

Lower ownership of digital TV and higher involuntary exclusion

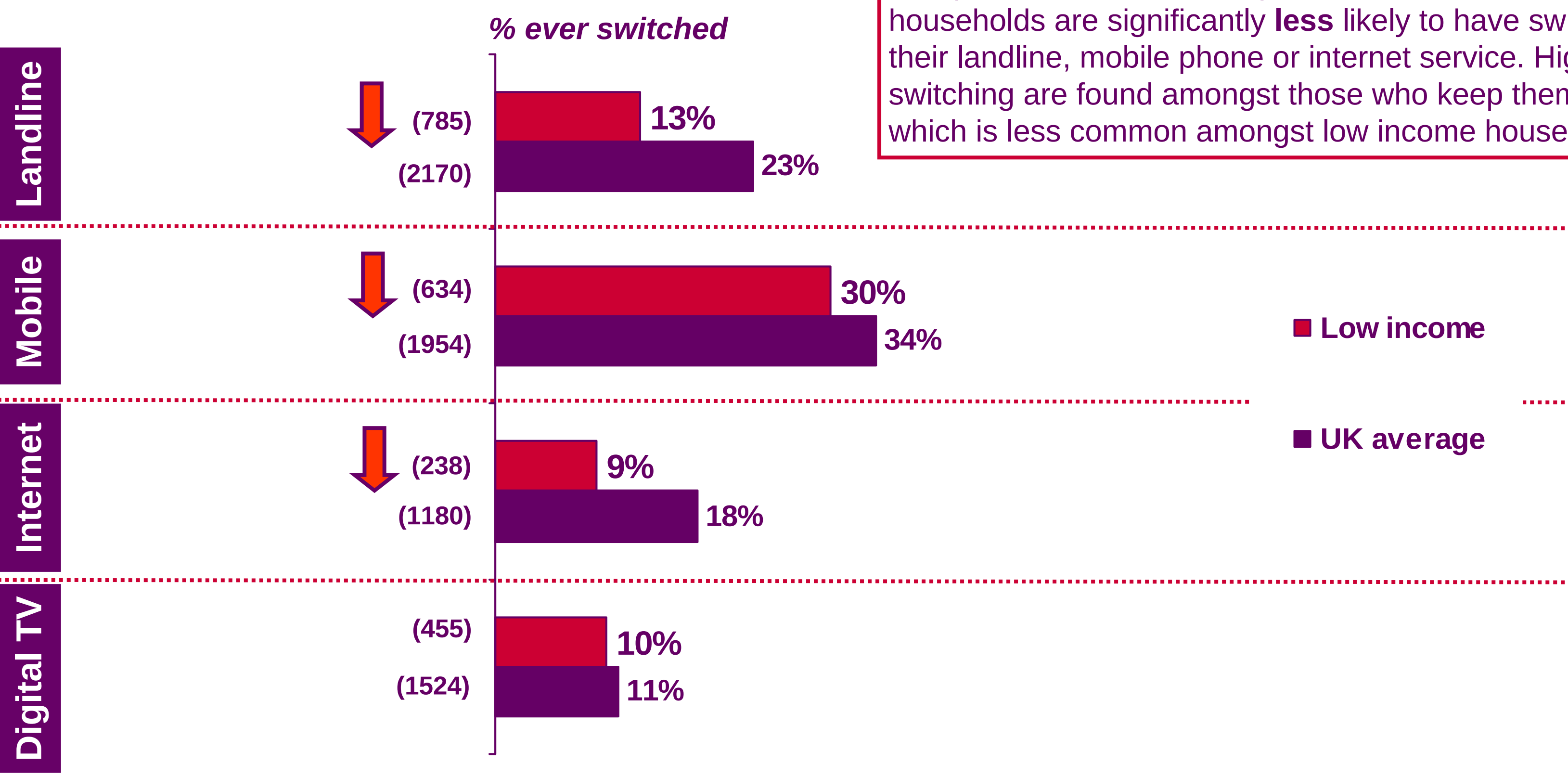


Consumers in low income households are less likely to have digital TV at home compared to the UK as a whole, and also have a significantly higher level of involuntary exclusion – where those without digital TV have not made this decision through **choice**. This is mostly due to affordability, but also lack of understanding of the technology and lack of access for some.

Base : All respondents in low income households (1013) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

Lower levels of switching phone and internet service suppliers



Compared to the UK average, consumers in low income households are significantly **less** likely to have switched supplier for their landline, mobile phone or internet service. Higher levels of switching are found amongst those who keep themselves informed, which is less common amongst low income households.

Base : All with access to each service at home

Indicates significantly lower or higher levels of switching

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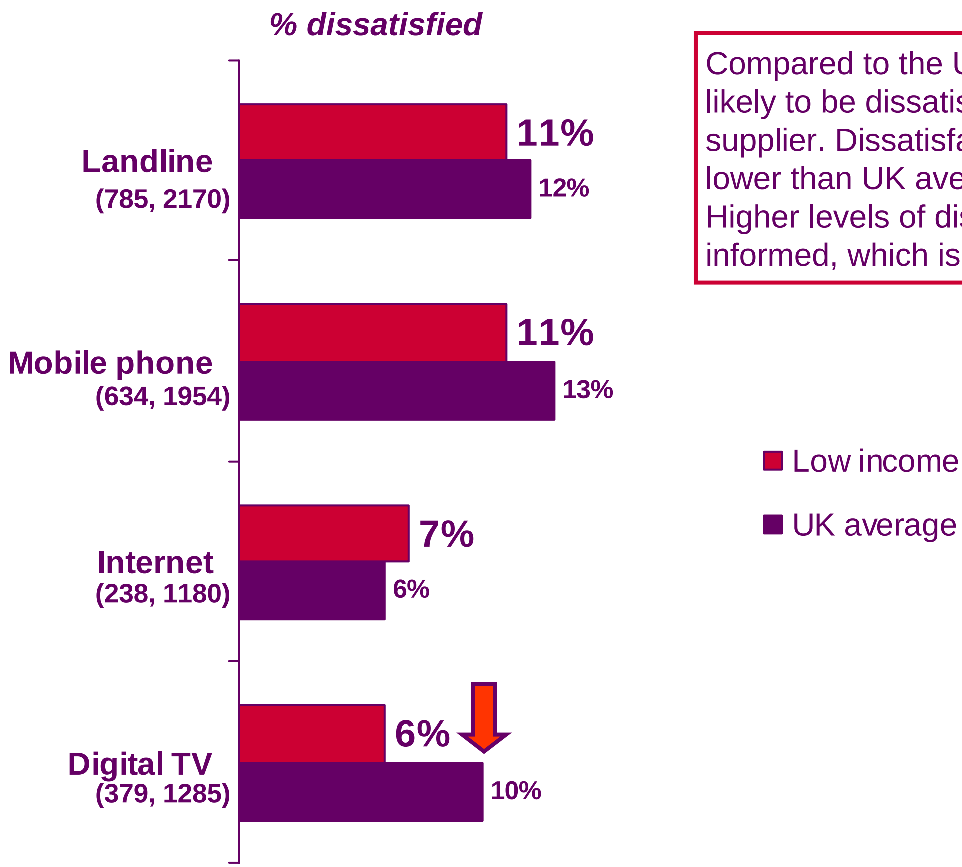
Levels of dissatisfaction with service broadly similar to the UK



Compared to the UK average, low income households are significantly **less** likely to be dissatisfied with the service they receive from their digital TV supplier. Dissatisfaction with their landline service and mobile phone network is lower than UK average, but does not differ significantly.
Higher levels of dissatisfaction are found amongst those who keep themselves informed, which is less common amongst those in low income households.

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

Base : All with access to each service at home

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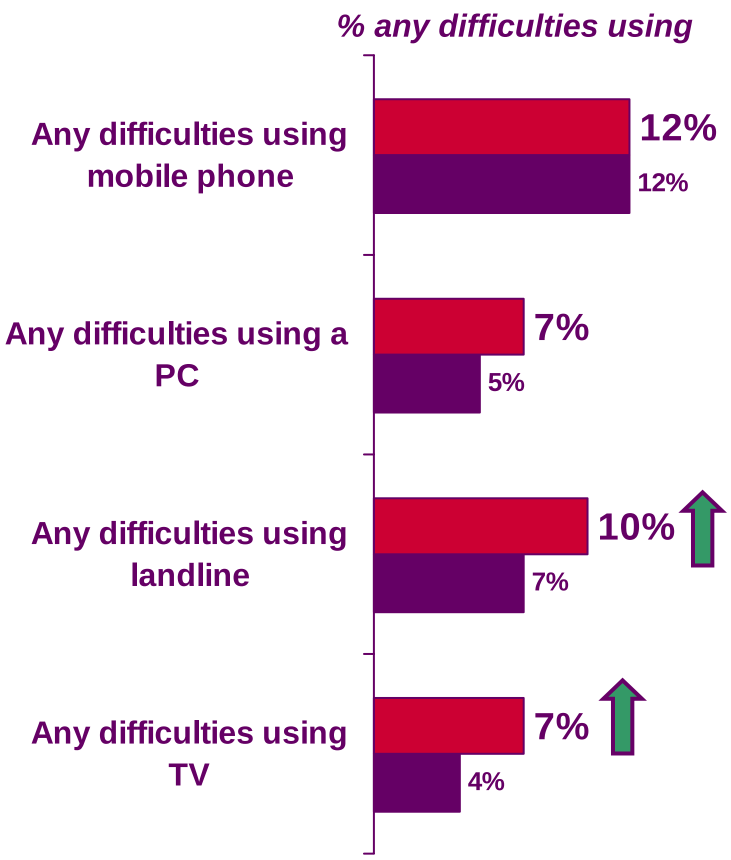
More likely to have any difficulties using a landline and TV than UK average



Compared to the UK average, consumers in low income households are significantly **more** likely to report they have any difficulties using a landline or a TV.

There is a strong link between low income households and people with a disability and/ or older people aged 65+, which likely explain the higher incidences of difficulties seen here

•Difficulties using a landline more commonly relate to hearing the phone ring or the person on the other end of the call
•Difficulties using a TV more commonly relate to hearing the TV

Base : All respondents in low income households (1013) and UK overall (2519)

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