

Ofcom Consumer Panel Research Quantitative Research Findings

Focus on Northern Ireland






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Report outline

- This report compares the findings for residential consumers in **Northern Ireland** with those for residential consumers in the **UK overall**
 - measures for England, Scotland and Wales are also shown for comparison
- Differences shown of $\pm 6\%$ (where based on all respondents) are statistically significant
- Where findings for Northern Ireland are significantly different from the UK average this has been shown using green and red arrows
 - to indicate significantly higher or lower measures for Northern Ireland
- 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>INTERVIEWS CONDUCTED</i>
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%	
<i>INTERVIEWS CONDUCTED</i>	1398	426	352	343	2519	

Summary of key findings for consumers in Northern Ireland compared to UK average

Understanding

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

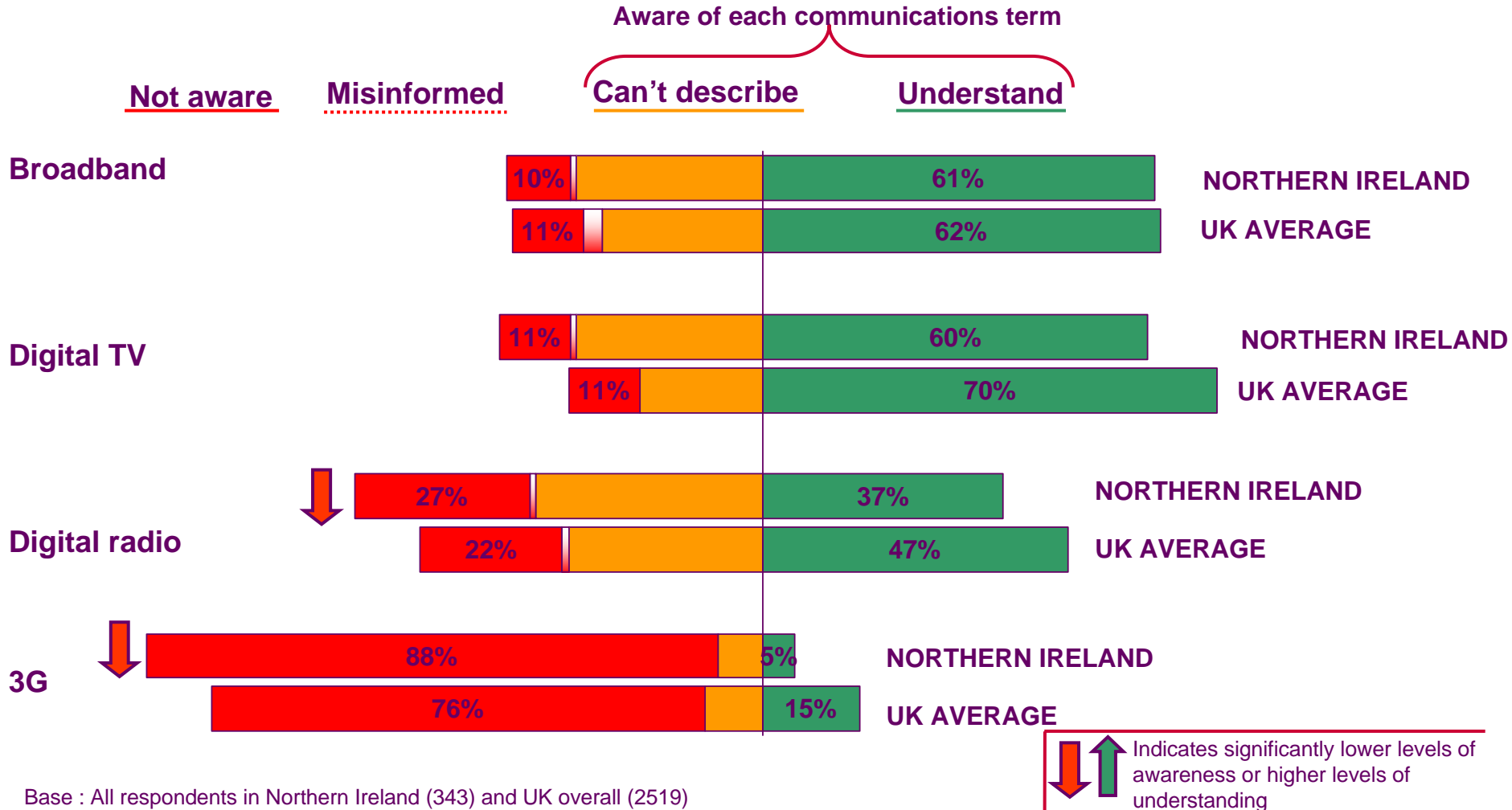
Keeping informed

- Less likely to nominate any sources of information or advice on communications services

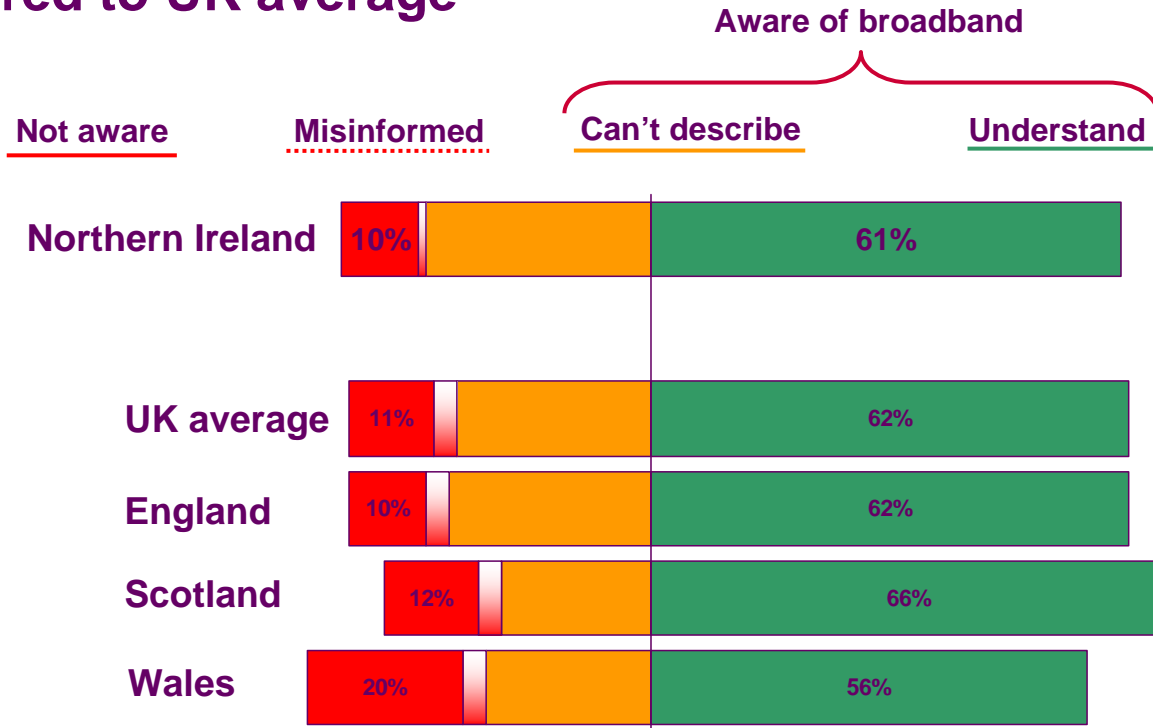
Ownership, use and satisfaction

- No real difference in terms of ownership levels for landline, mobile phone and internet, but less likely to have digital TV at home
- Less likely overall to have ever switched suppliers for their home communications services
- Just as likely to access the internet at all, but less likely to have broadband at home
- More likely to be dissatisfied with their home communications services

Less likely to have heard of digital radio and 3G



No significant difference in awareness or understanding of broadband compared to UK average

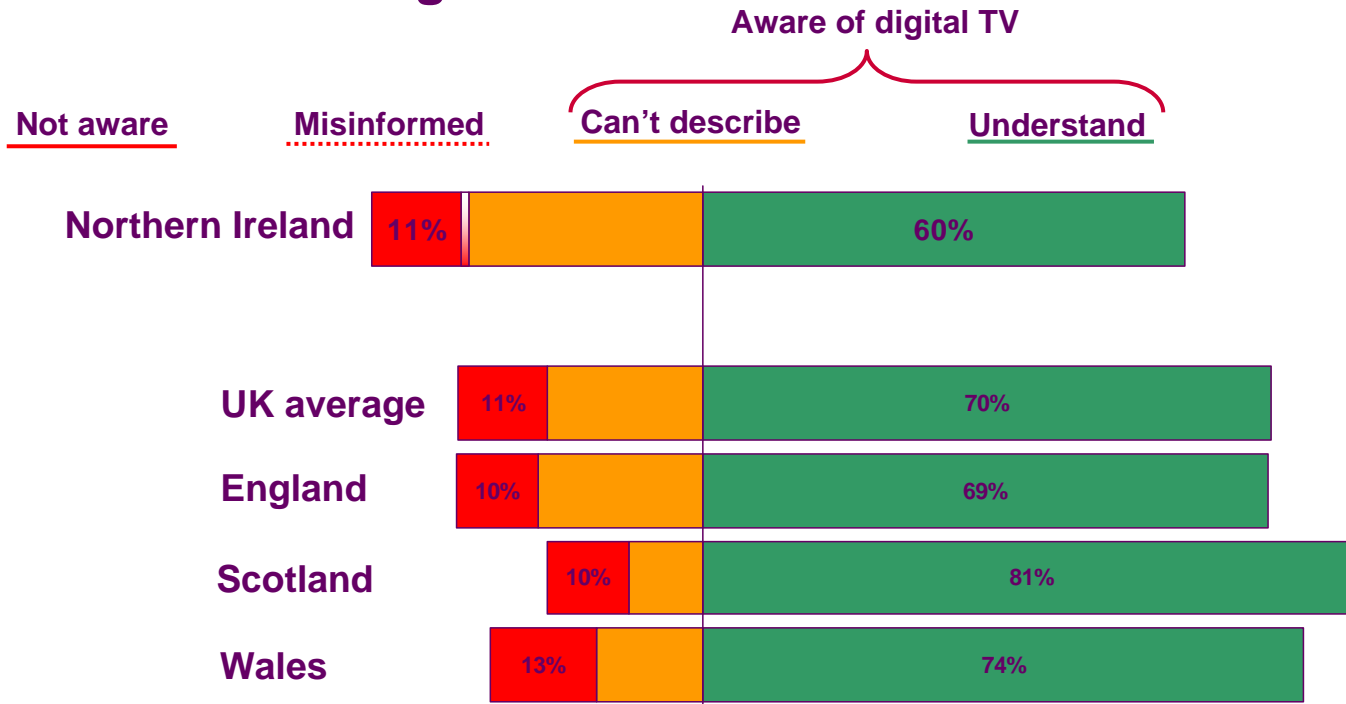


Amongst consumers in Northern Ireland, awareness and understanding of broadband is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

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

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

No difference in awareness of digital TV, but lower understanding compared to UK average

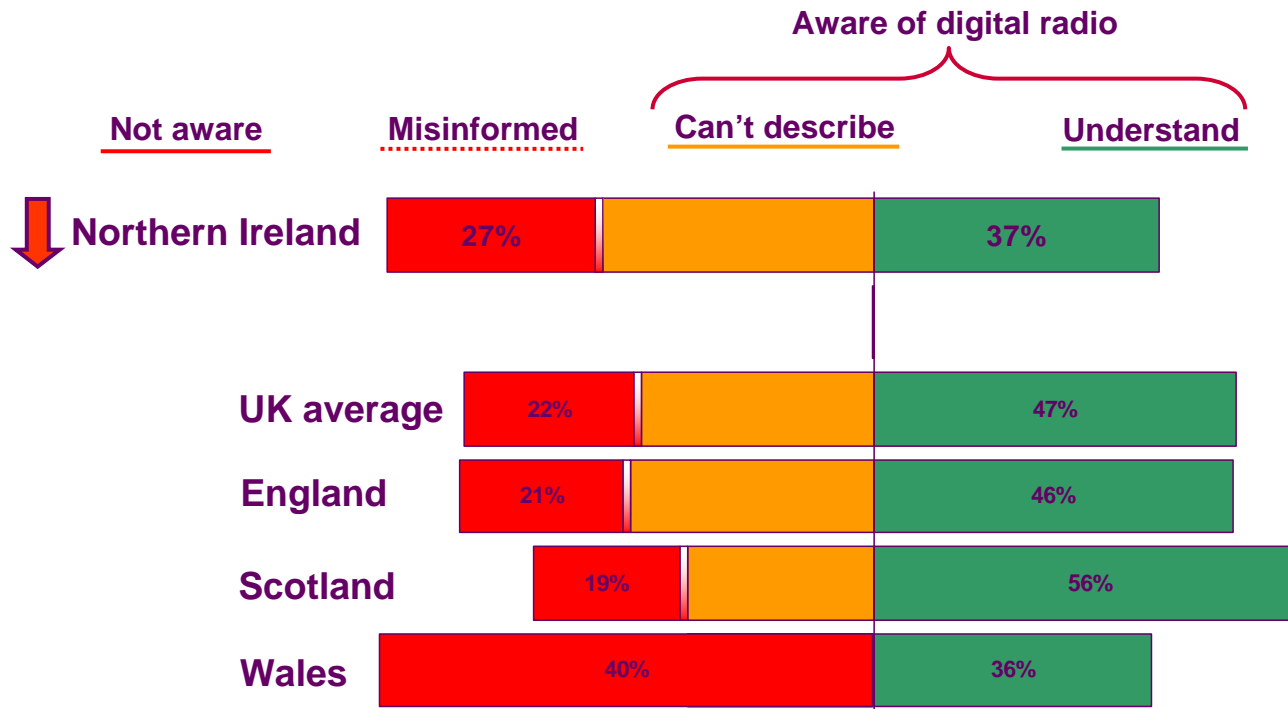


Amongst consumers in Northern Ireland, awareness and understanding of digital TV is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

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

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

Less likely to understand the term digital radio compared to UK average

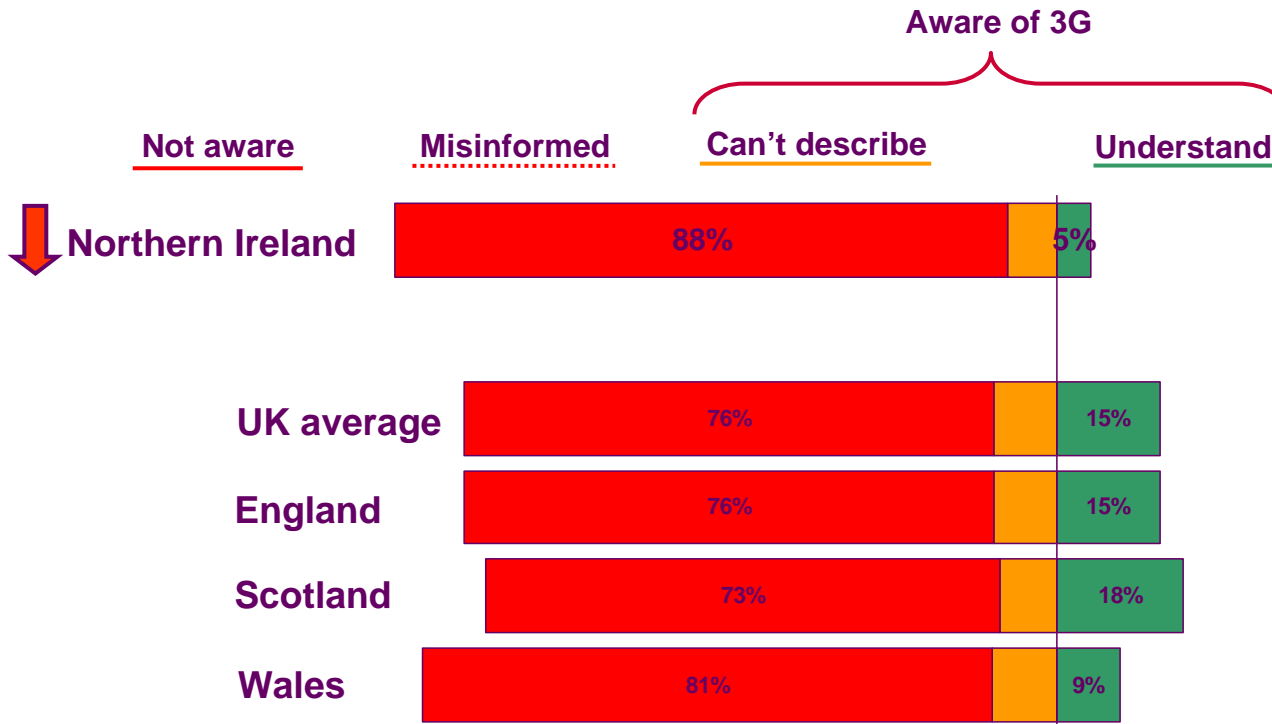


Amongst consumers in Northern Ireland, awareness and understanding of digital radio is significantly lower than those in low income households (under £11,500 per year), and awareness is significantly lower amongst older people (aged 65 and over)

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

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

Less likely to have heard of 3G compared to UK average

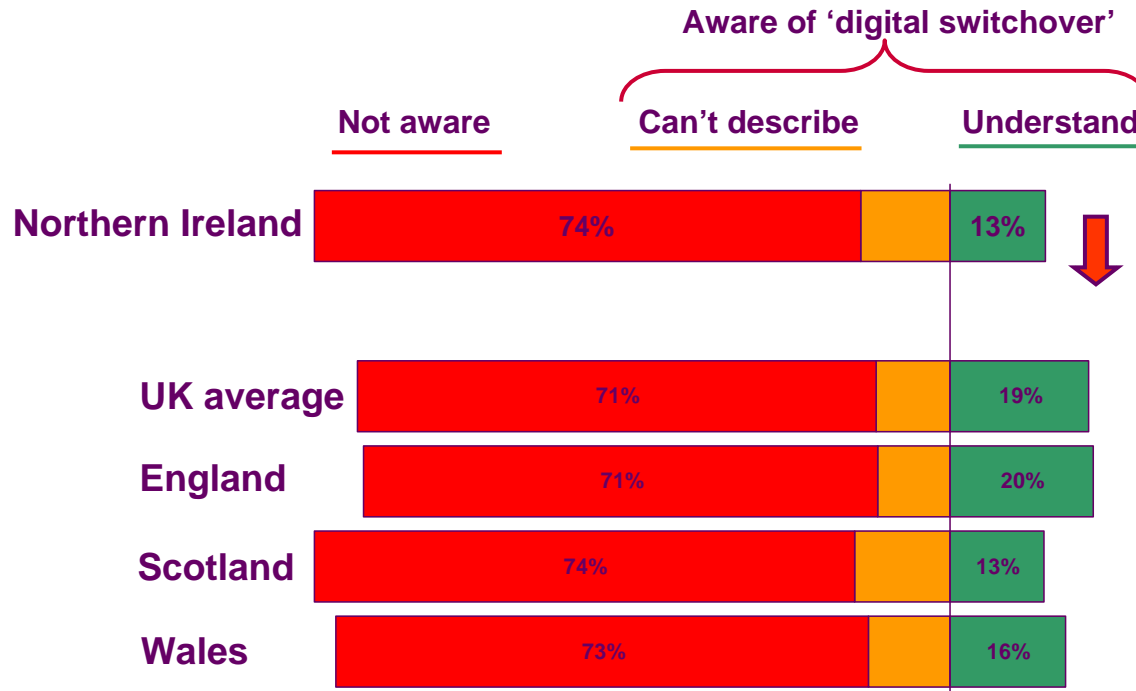


Amongst consumers in Northern Ireland, awareness and understanding of 3G is significantly lower amongst those in low income households (under £11,500 per year). Whilst levels are lower amongst older people, they are not statistically significant due to the low base size

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

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

Less likely than UK average to understand ‘digital switchover’

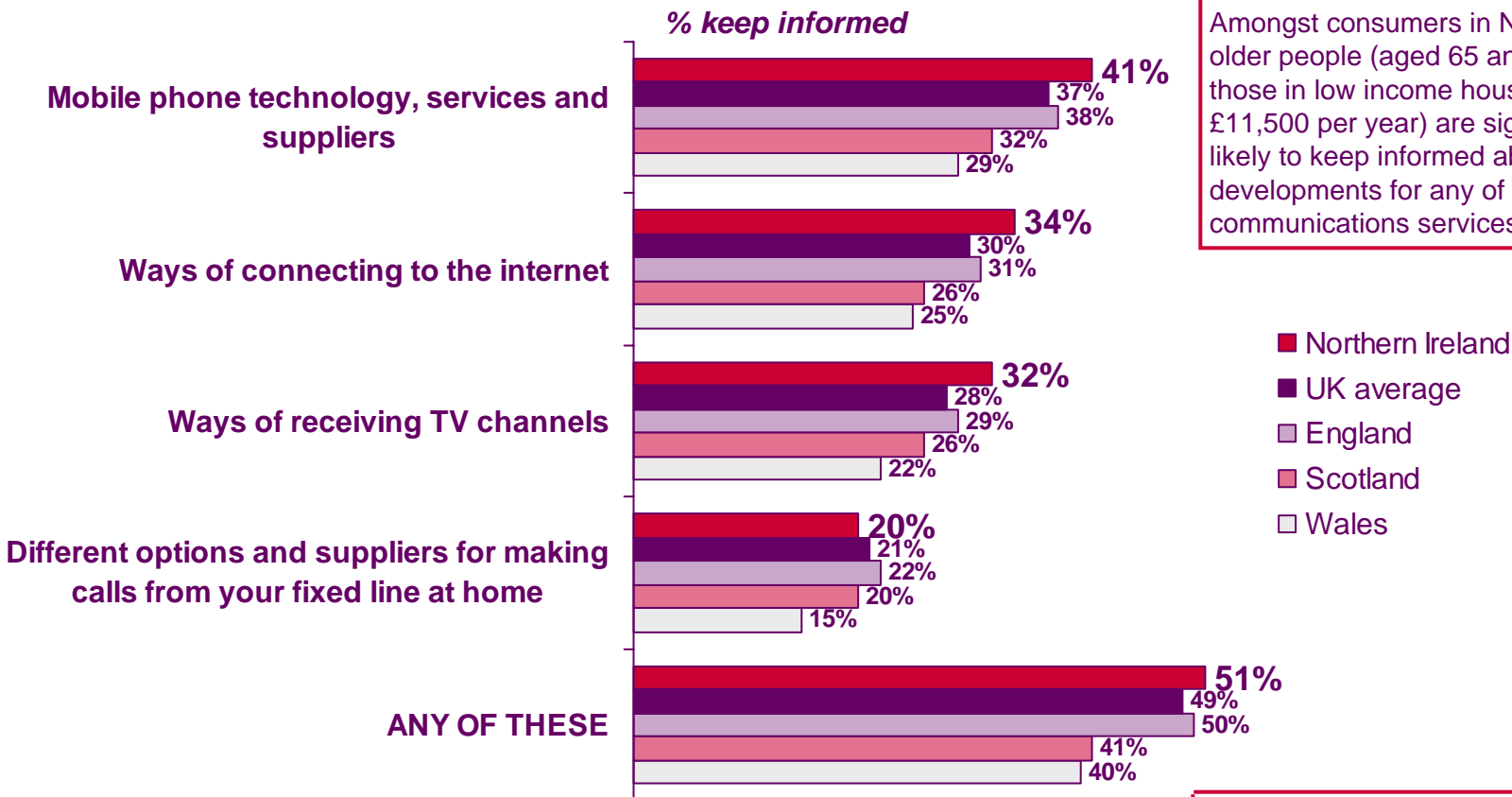


Amongst consumers in Northern Ireland, older people (aged 65 and over) are more likely to be aware of digital switchover than the measure for Northern Ireland as a whole, but do not differ in terms of understanding of digital switchover. Those in low income households (under £11,500 per year) are less likely to have heard of and less likely to understand digital switchover.

Indicates significantly lower or higher levels of understanding

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

No difference from UK average in terms of keeping informed



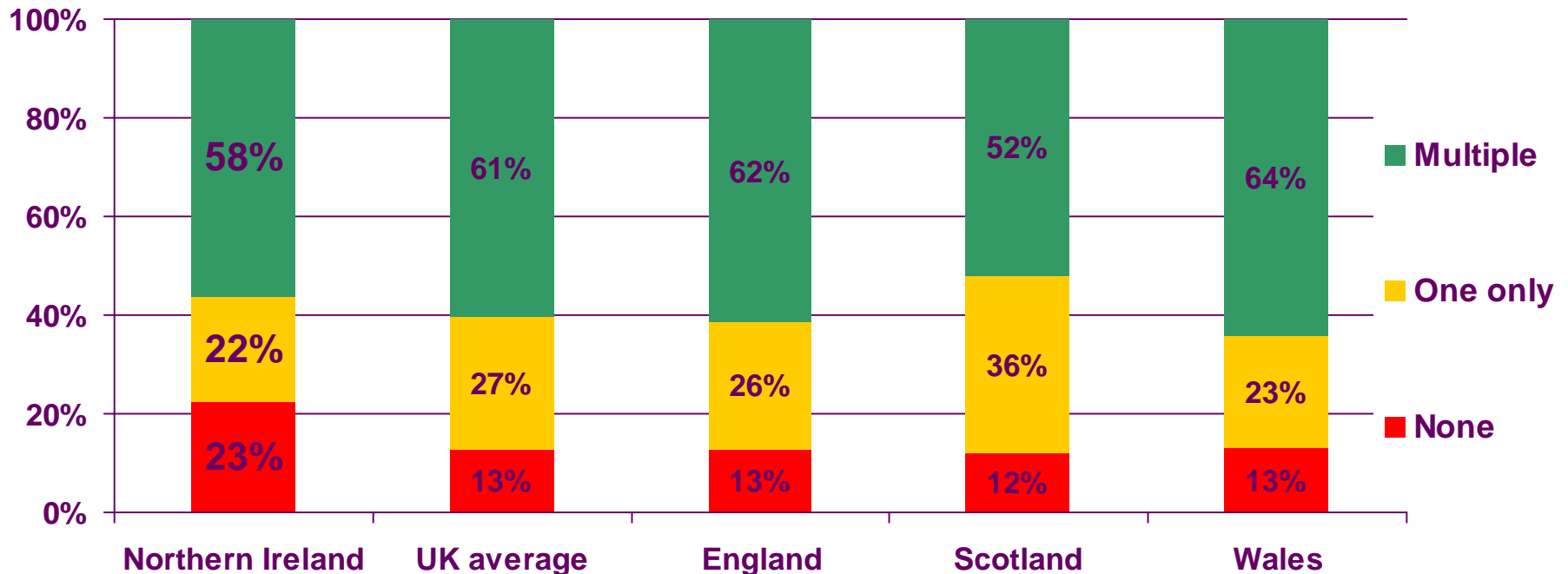
Amongst consumers in Northern Ireland, older people (aged 65 and over) and those in low income households (under £11,500 per year) are significantly less likely to keep informed about developments for any of these communications services

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

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

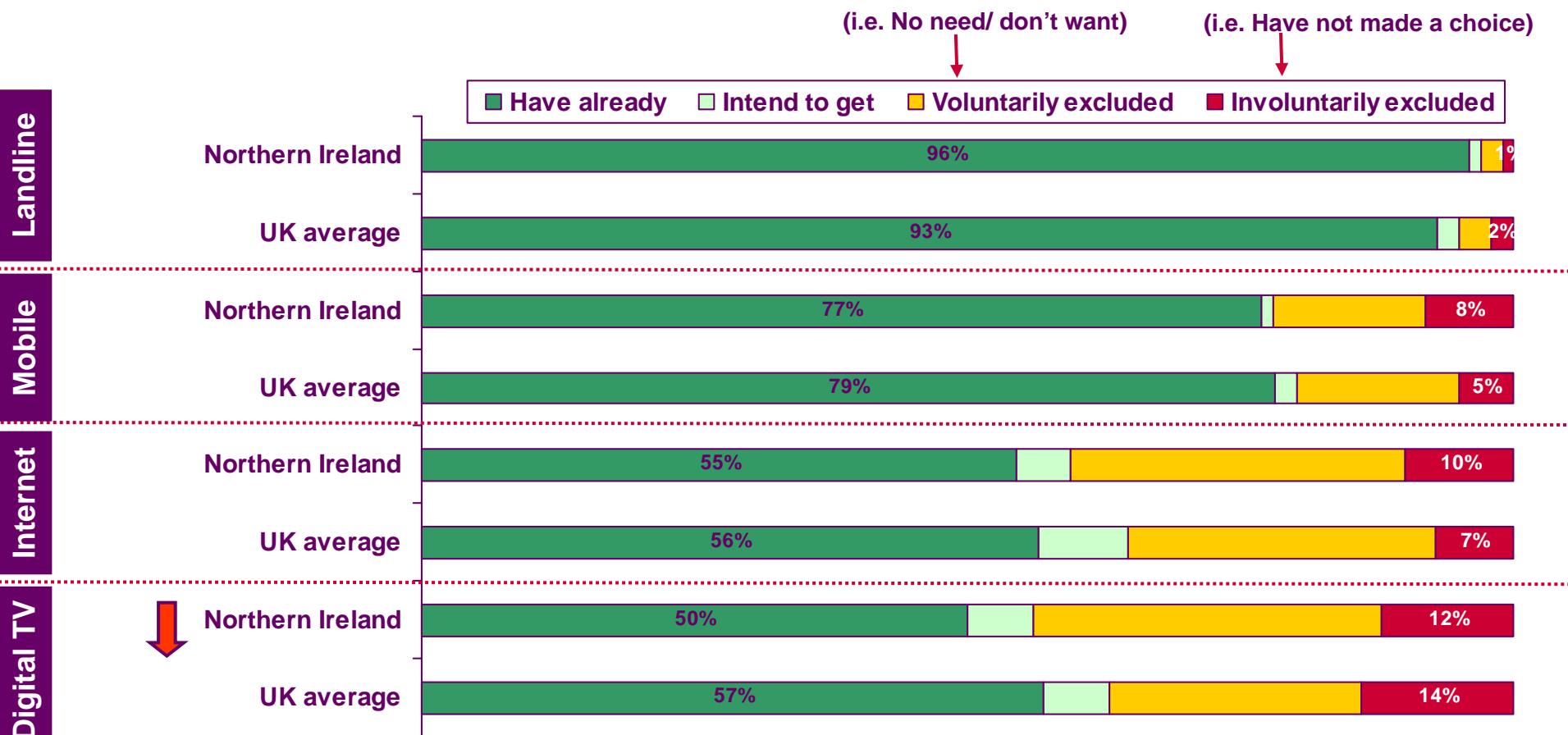
Less likely to recall any sources of advice or information on communications services

Amongst consumers in Northern Ireland, older people (aged 65 and over) and those in low income households (under £11,500 per year) are significantly less likely to recall any sources of advice or information on communications services



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

Ownership of most technologies is broadly similar to the UK average



Base : All respondents in Northern Ireland (343) and UK overall (2519)

↑↓ Indicates significantly lower or higher levels of ownership

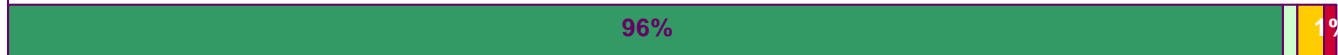
Ownership levels for landline similar to the UK average

(i.e. No need/ don't want)

(i.e. Have not made a choice)

■ Have already ■ Intend to get ■ Voluntarily excluded ■ Involuntarily excluded

Northern Ireland



Amongst consumers in Northern Ireland, the proportion of older people (aged 65 and over) and those in low income households with a landline at home is broadly similar to the level for Northern Ireland as a whole

UK average



England



Scotland



Wales

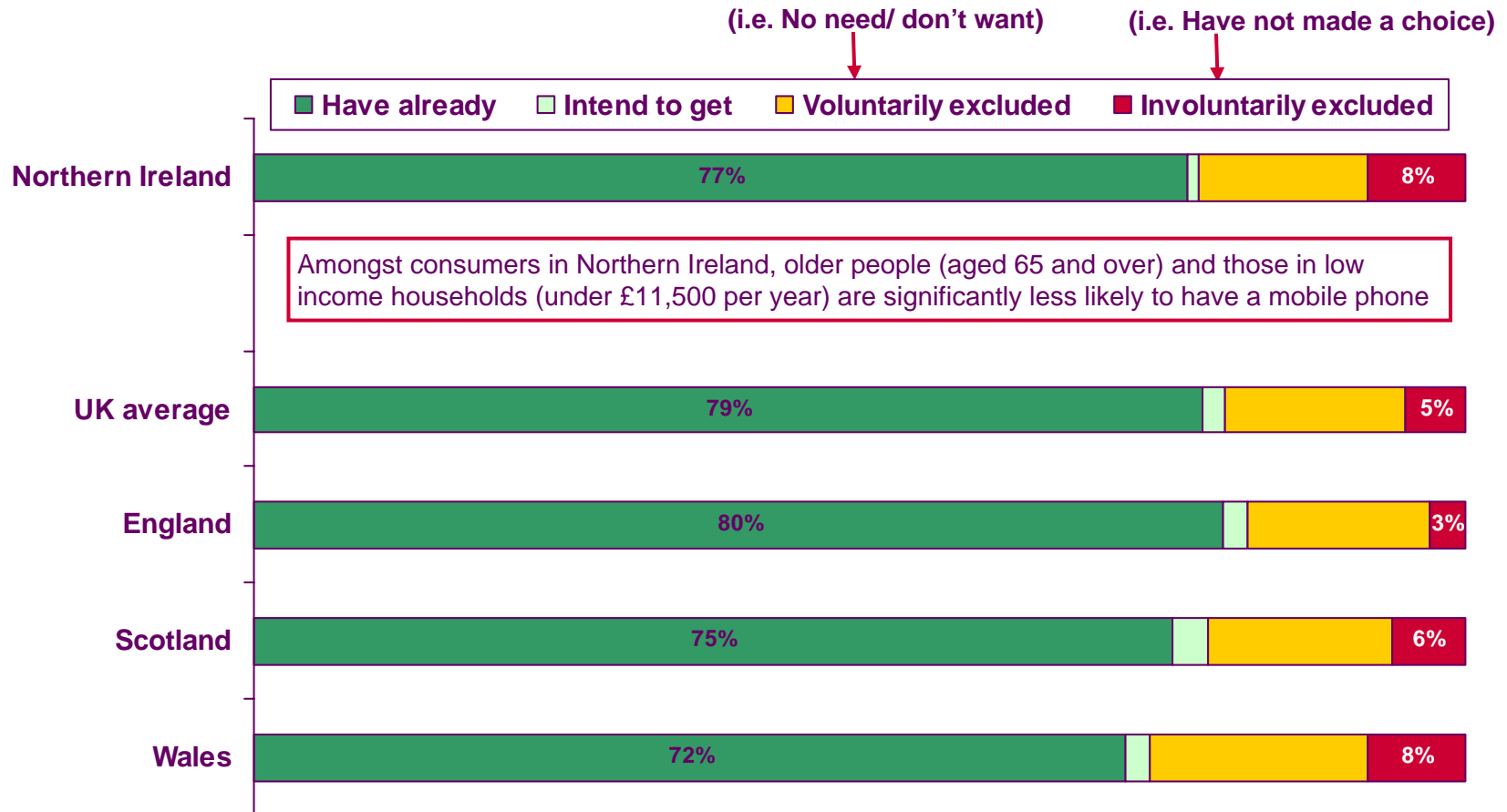


Landline

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

↑↓ Indicates significantly lower or higher levels of ownership

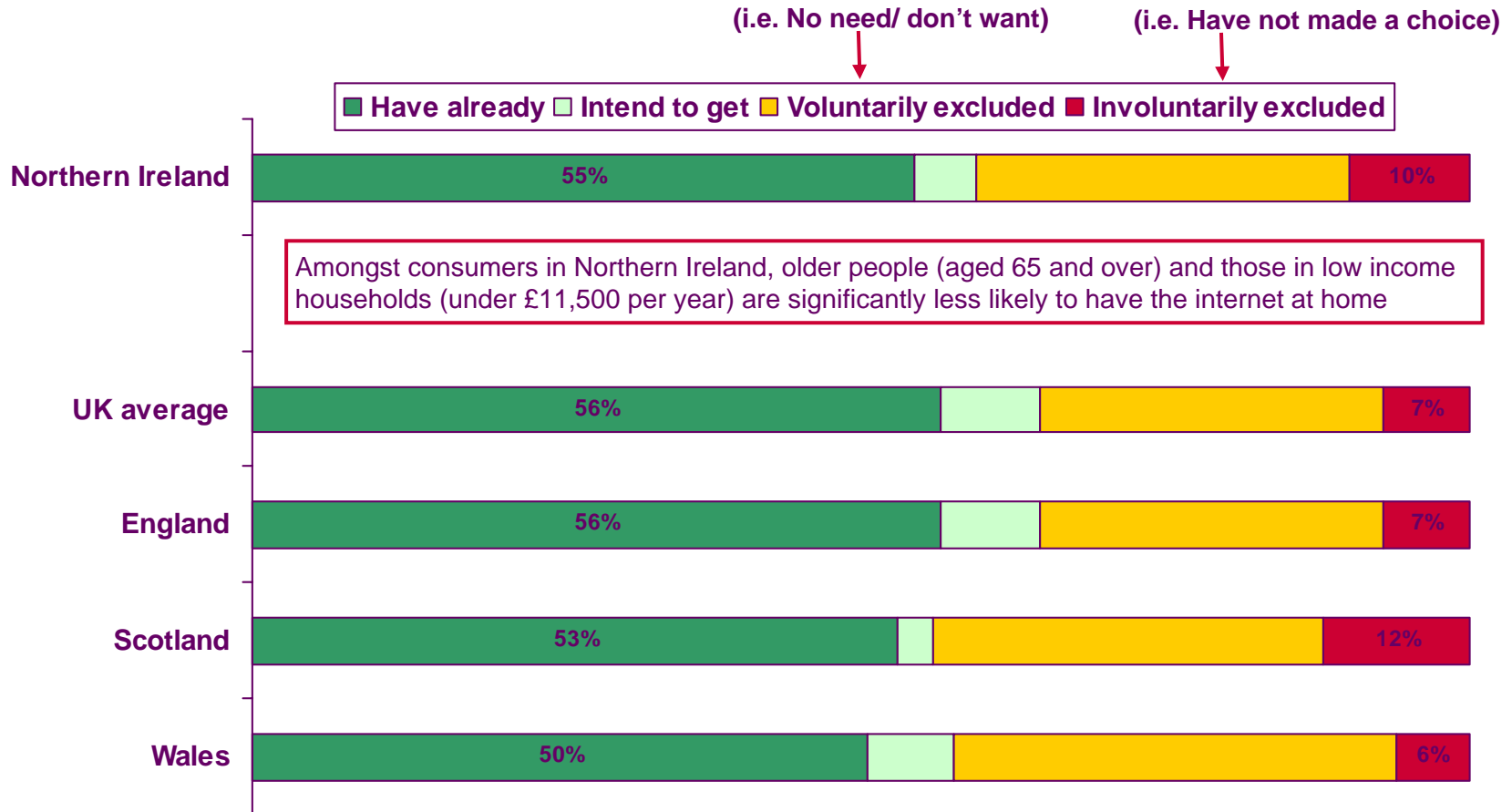
Mobile phone ownership broadly similar to the UK average



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

Indicates significantly lower or higher levels of ownership

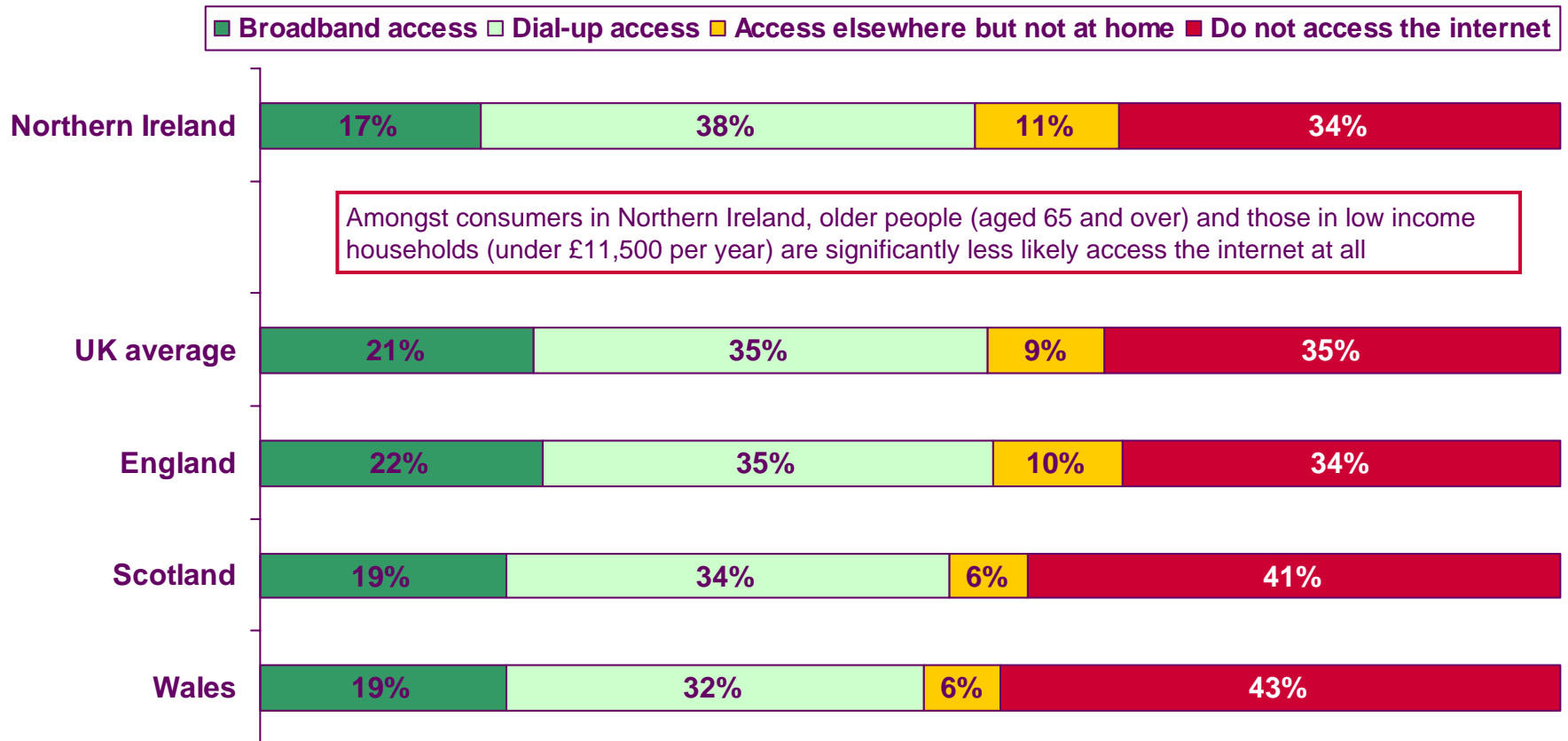
Internet ownership broadly similar to the UK average



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

Indicates significantly lower or higher levels of ownership

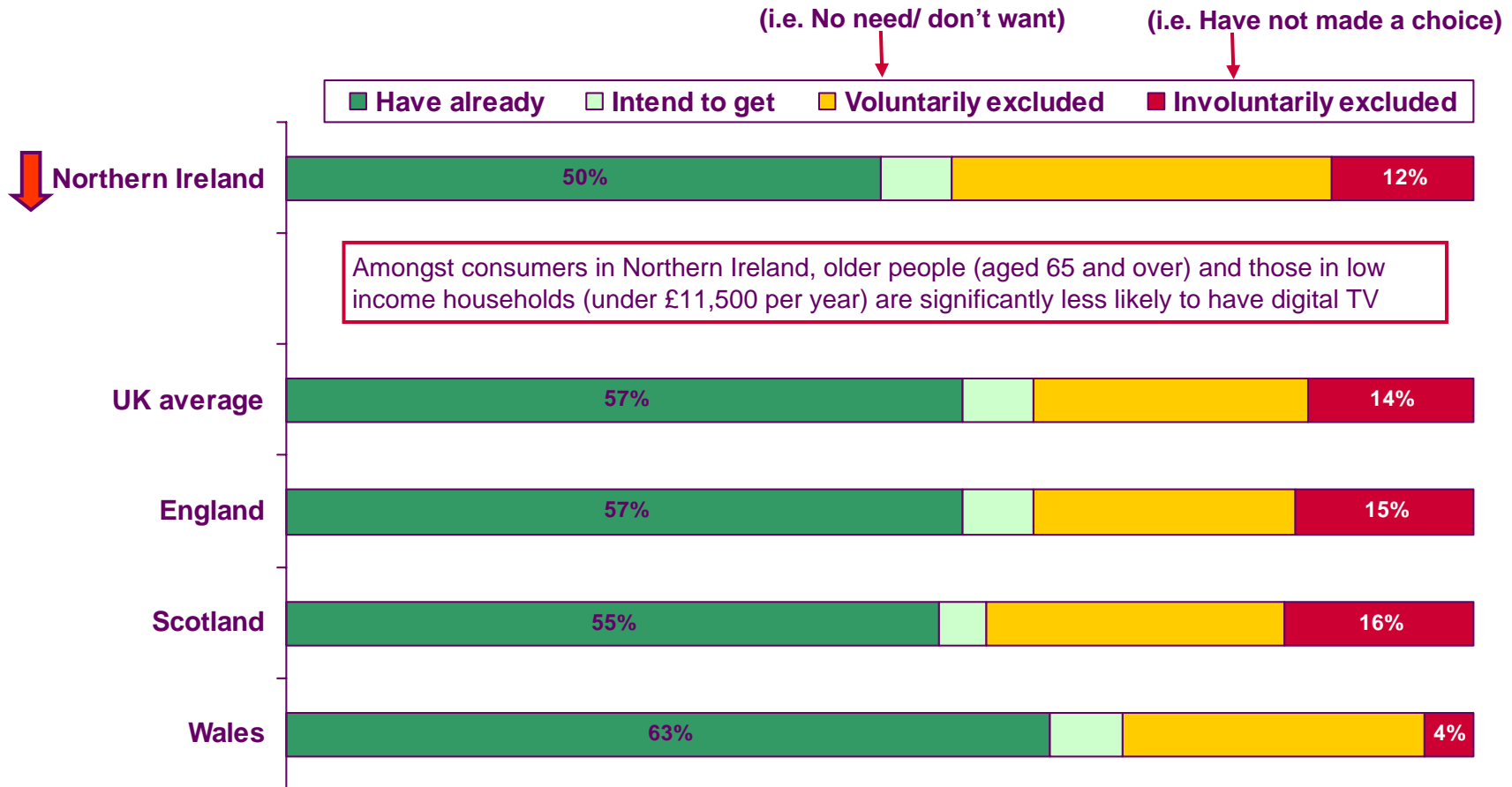
Less likely to have broadband access at home, but just as likely to ever access the internet



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

↓↑ Indicates significantly lower or higher levels accessing the Internet

Lower digital TV ownership compared to UK average



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

Indicates significantly lower or higher levels of ownership

Lower levels of switching mobile phone network & digital TV service supplier compared to UK average

Landline



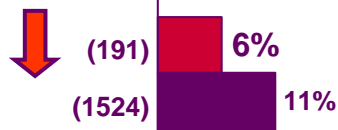
Mobile



Internet



Digital TV



In Northern Ireland sample sizes for older people (aged 65 and over) who have each of the technologies at home are too small to make any robust comparisons.

The same is true for those in low income households (under £11,500 per year) regarding internet.

Ownership levels for landlines, mobile phones and digital TV amongst those in low income households in Northern Ireland do not differ significantly from Northern Ireland as a whole.

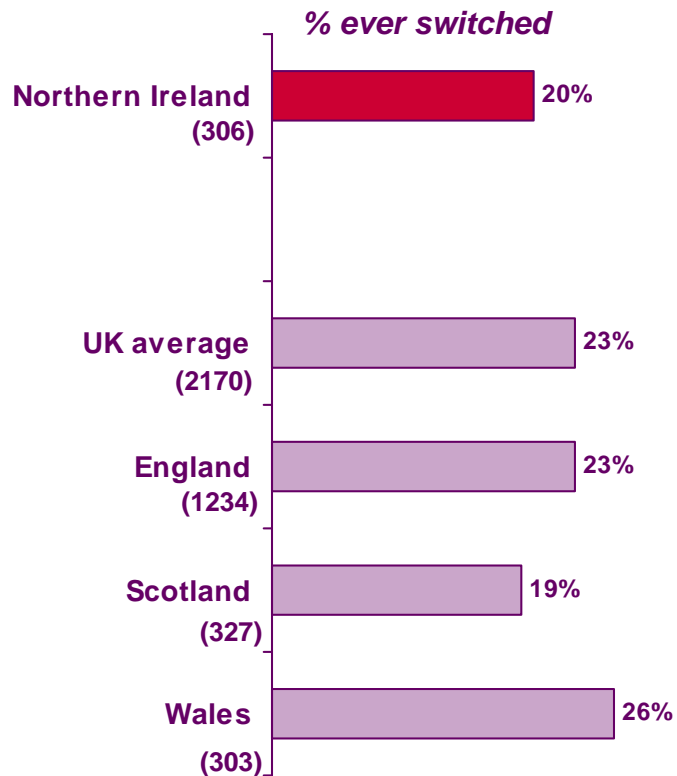
■ Northern Ireland

■ UK average

Base : All with access to each service at home

Indicates significantly lower or higher levels of switching

No significant difference in landline customers switching supplier compared to the UK average

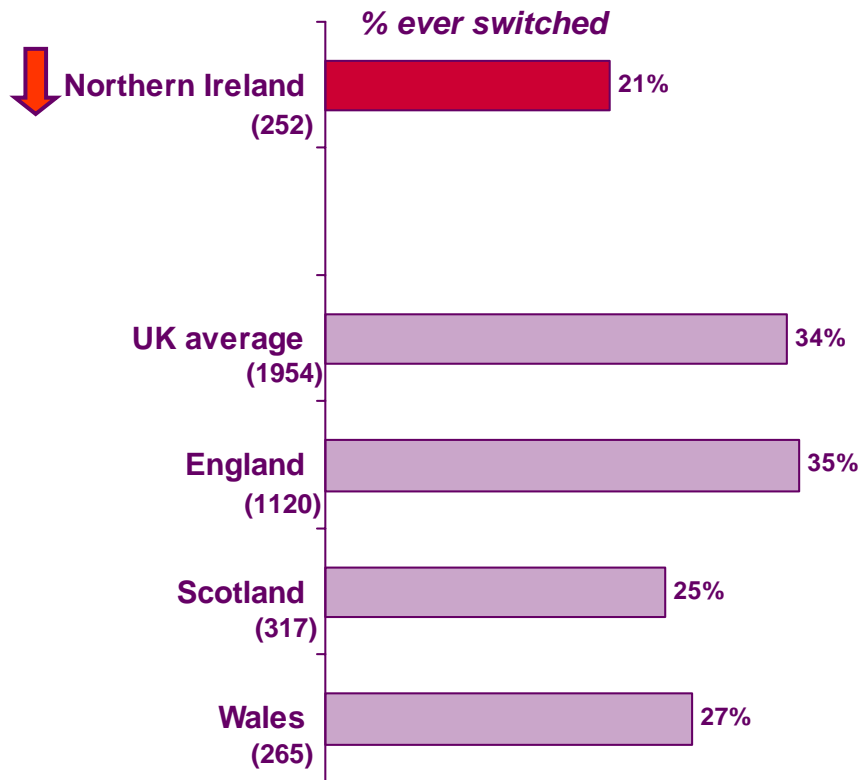


Landline

Base : All with a landline at home

  Indicates significantly lower or higher levels of switching

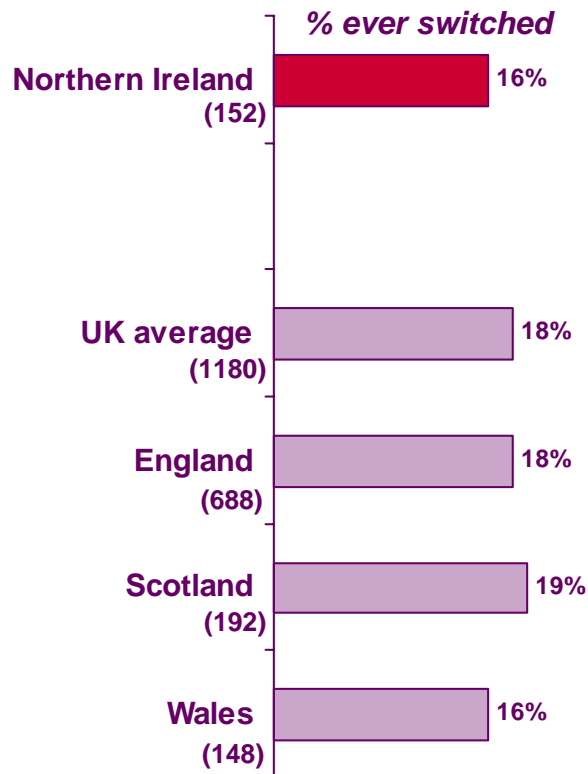
Mobile phone customers are less likely to have ever switched network compared to the UK average



Base : All with a mobile phone

  Indicates significantly lower or higher levels of switching

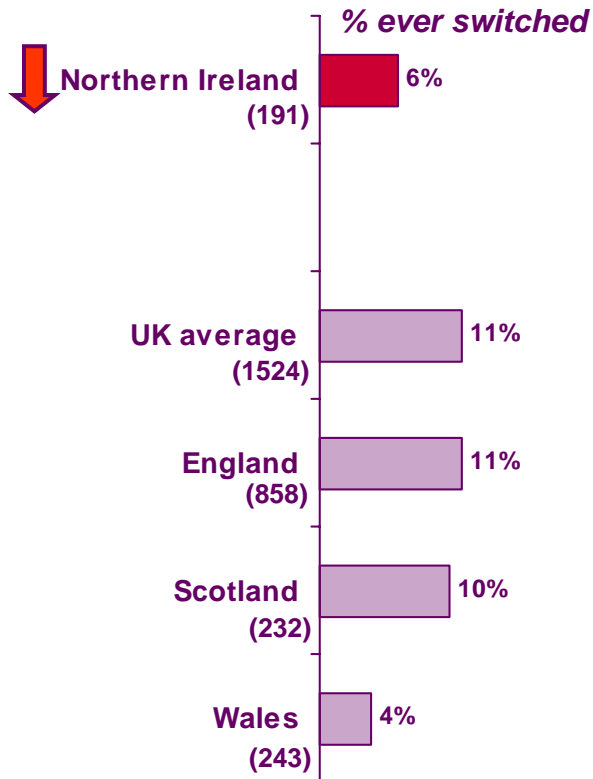
No significant difference in internet customers switching supplier compared to the UK average



Base : All with internet access at home

  Indicates significantly lower or higher levels of switching

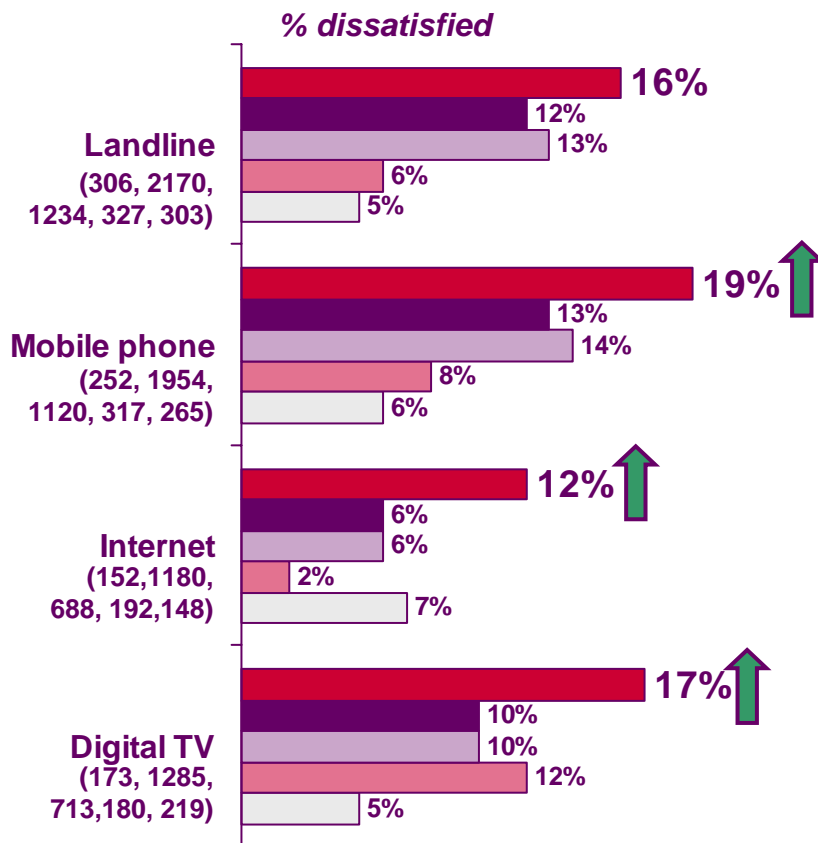
Digital TV customers are less likely to have switched supplier compared to the UK average



Base : All with digital TV at home

Indicates significantly lower or higher levels of switching

Higher proportion dissatisfied with their services than the other nations



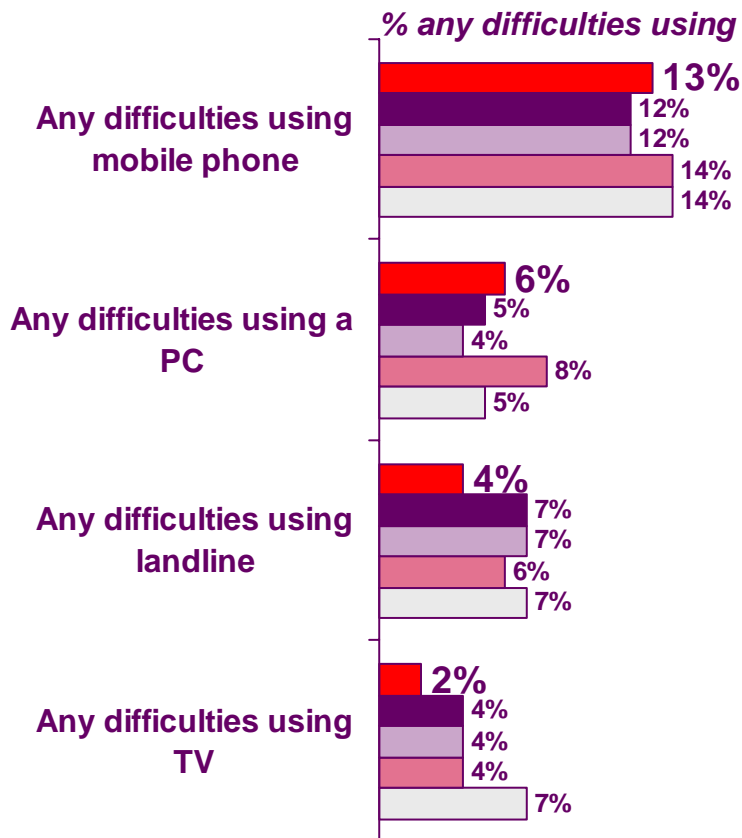
In Northern Ireland sample sizes for older people (aged 65 and over) who have each of the technologies at home are too small to make any robust comparisons. The same is true for those in low income households (under £11,500 per year) regarding internet. Levels of dissatisfaction regarding landlines and digital TV amongst those in low income households do not differ significantly from Northern Ireland as a whole. Levels of dissatisfaction regarding the mobile phone service for those in low income households is lower (10% cf. 19%)

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

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

Base : All with access to each service at home

Do not differ from UK average in terms of difficulties using technologies



Amongst consumers in Northern Ireland, older people (aged 65 and over) do not differ significantly from the measures for Northern Ireland as a whole in reporting any difficulties using the technologies. Those in low income households (under £11,500 per year) are significantly more likely to report any difficulties using a mobile phone and PC, but do not differ significantly from the measures for Northern Ireland as a whole for using a landline or TV.



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



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