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Ofcom Consumer Panel Research Quantitative Research Findings

Focus on Rural and Dense Urban areas

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Report outline

- This report compares the findings for residential consumers living in rural areas with those in dense urban areas and the **UK overall**
  - Using ACORN (A Classification Of Residential Neighbourhoods) classifications to define rural and dense urban areas
- Differences shown of ±5% for rural areas and ±4% for dense urban areas (where based on all respondents) are statistically significant
- Where findings for those in rural and dense urban areas 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 rural and dense urban areas
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

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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

Understanding

- Awareness and understanding of communications terms mostly does not differ from the UK average, but those in rural areas are less likely to have heard of 3G and those in dense urban areas are more likely to understand what 3G is
- Those in dense urban areas are less likely to have heard the term ‘digital switchover’

Keeping informed

- Keeping informed of developments for communications services does not differ from the UK average, but those in dense urban areas are more likely to keep informed compared to those in rural areas

Ownership, use and satisfaction

- Ownership of communications technologies does not differ from the UK average for landline, mobile phone and internet at home, but those in dense urban areas are less likely to have digital TV at home
- Higher levels of involuntary exclusion for those in rural areas for digital TV compared to UK average
- Higher levels of involuntary exclusion for those in dense urban areas for internet and digital TV compared to UK average
- Those in rural areas are more likely than to have ever switched their home internet supplier but less likely to have changed digital TV supplier
- Those in dense urban areas are less likely than the UK average to have ever switched supplier for their mobile phone and home internet service
- Levels of accessing the internet at all do not differ from the overall UK measure, but those in rural areas are less likely and those in dense urban areas are more likely to have broadband access at home
- Those in rural areas are generally less likely to be dissatisfied with their home communications services, with the exception of digital TV where dissatisfaction is higher than the UK average
- Those in dense urban areas have similar levels of dissatisfaction with their home communications services to the UK as a whole, with the exception of their mobile phone service where dissatisfaction is higher than the UK average

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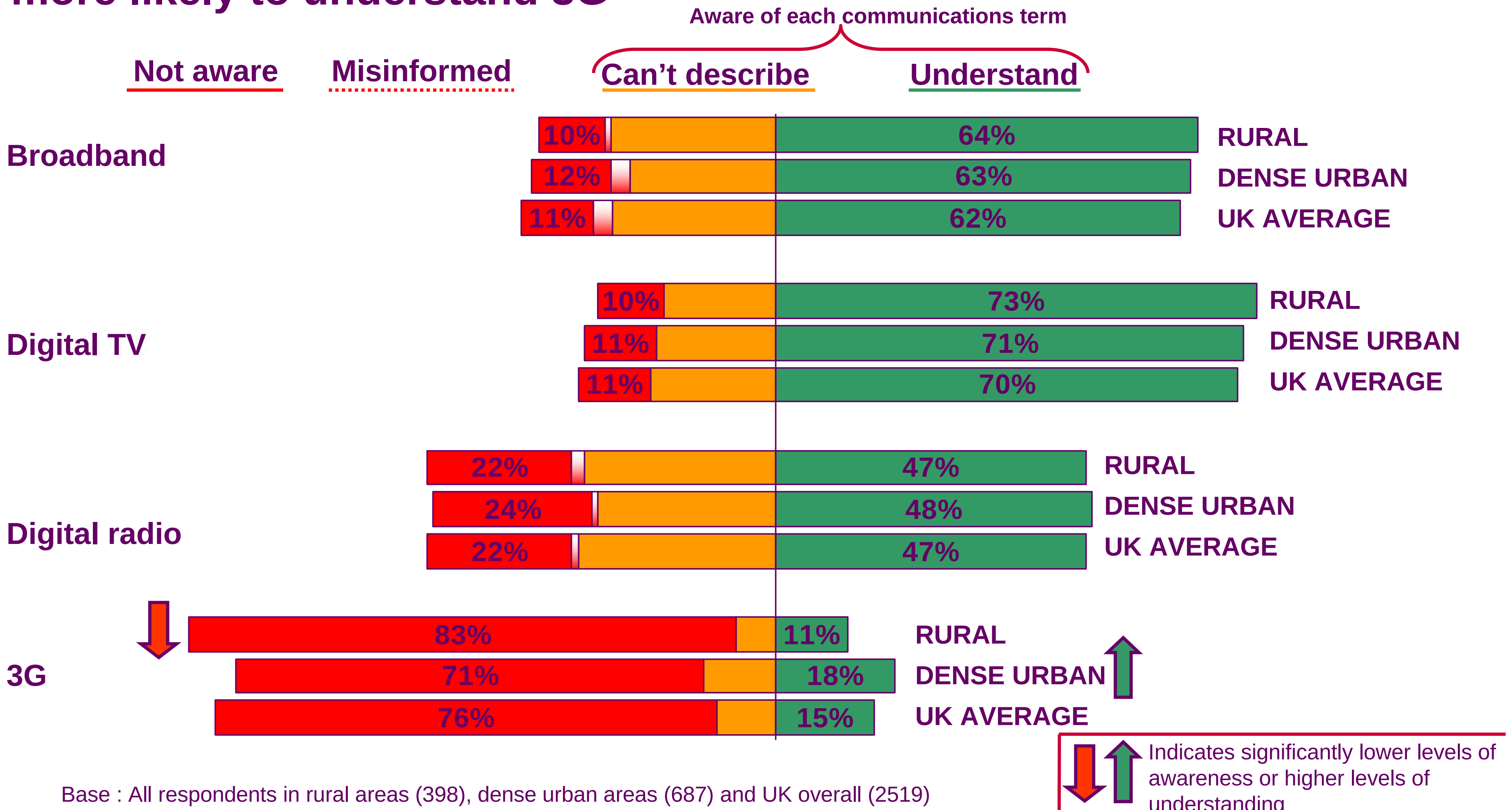
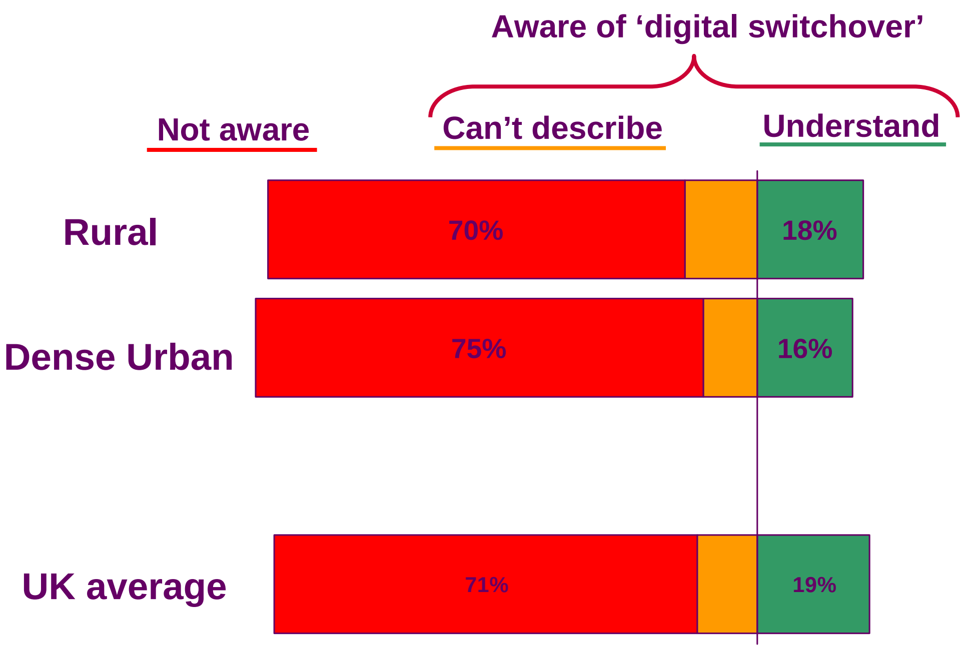
Rural areas less likely to have heard of 3G, those in dense urban areas more likely to understand 3G



Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Lower awareness of 'digital switchover' for those in dense urban areas

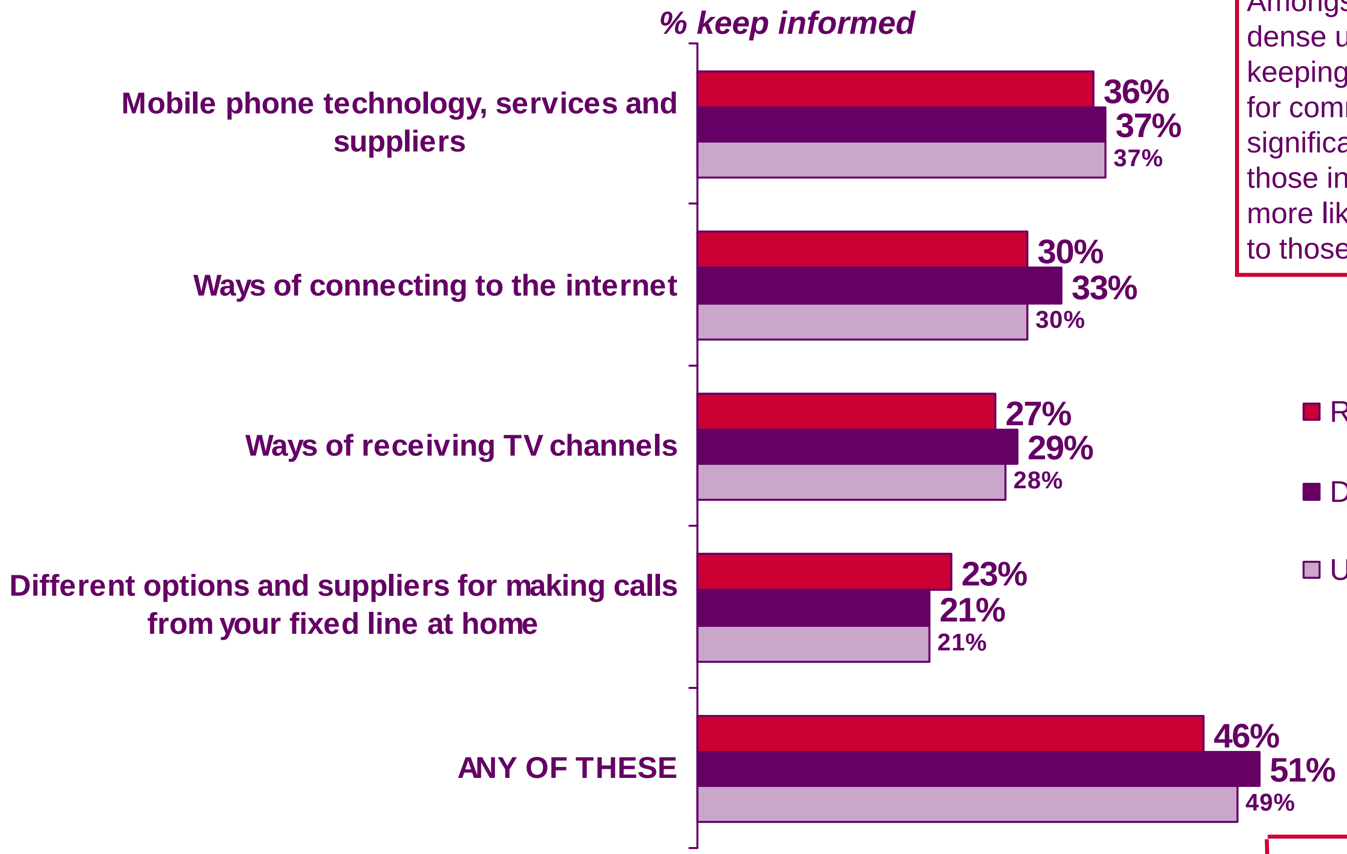


Whilst the proportion able to correctly describe 'digital switchover' does not differ from the UK average for those in rural and dense urban areas, a higher proportion of those in dense urban areas have not heard of this term

Indicates significantly lower or higher levels of understanding

Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Levels of keeping informed broadly similar to UK average



Amongst residential consumers in rural and dense urban areas, overall levels for keeping informed about new developments for communications services do not differ significantly from the UK average. However, those in dense urban areas are significantly more likely to keep informed at all compared to those in rural areas.

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

Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

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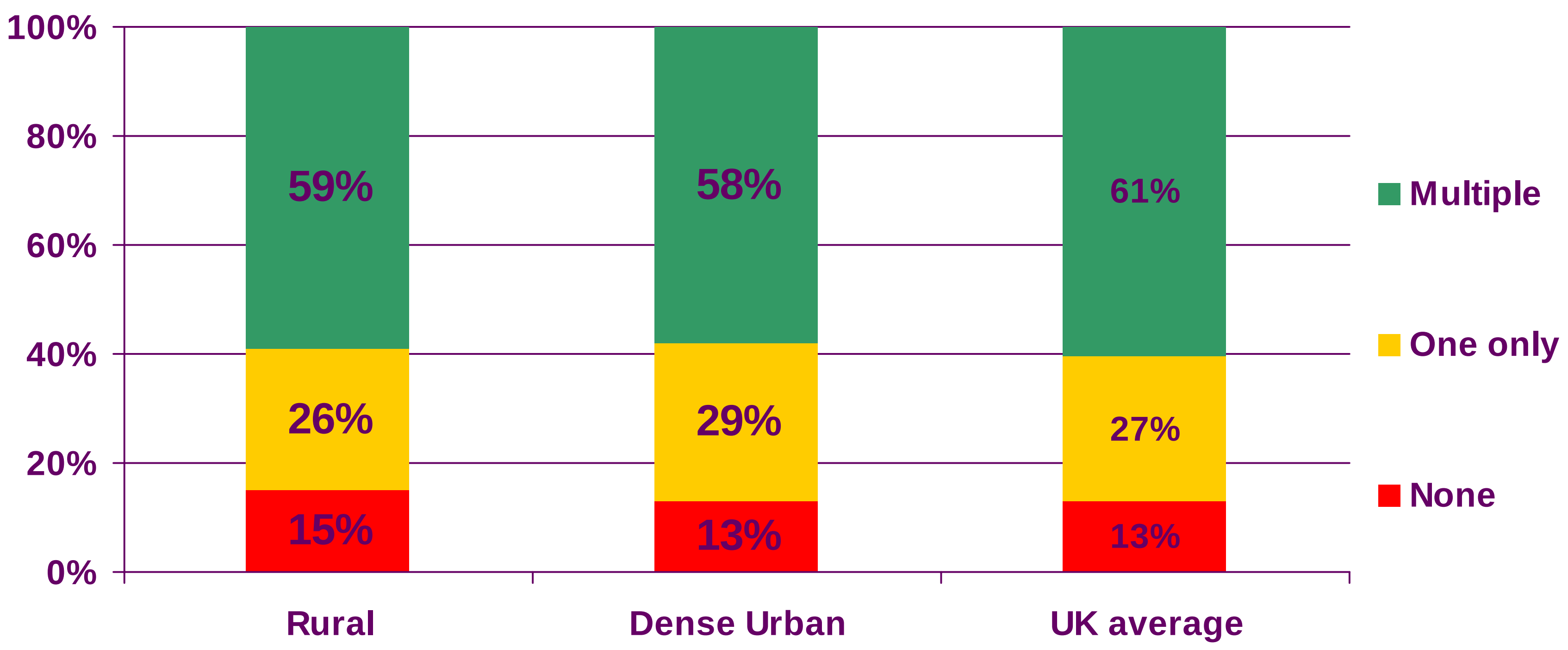
Recall of sources of advice or information on communications services does not differ from UK average



Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

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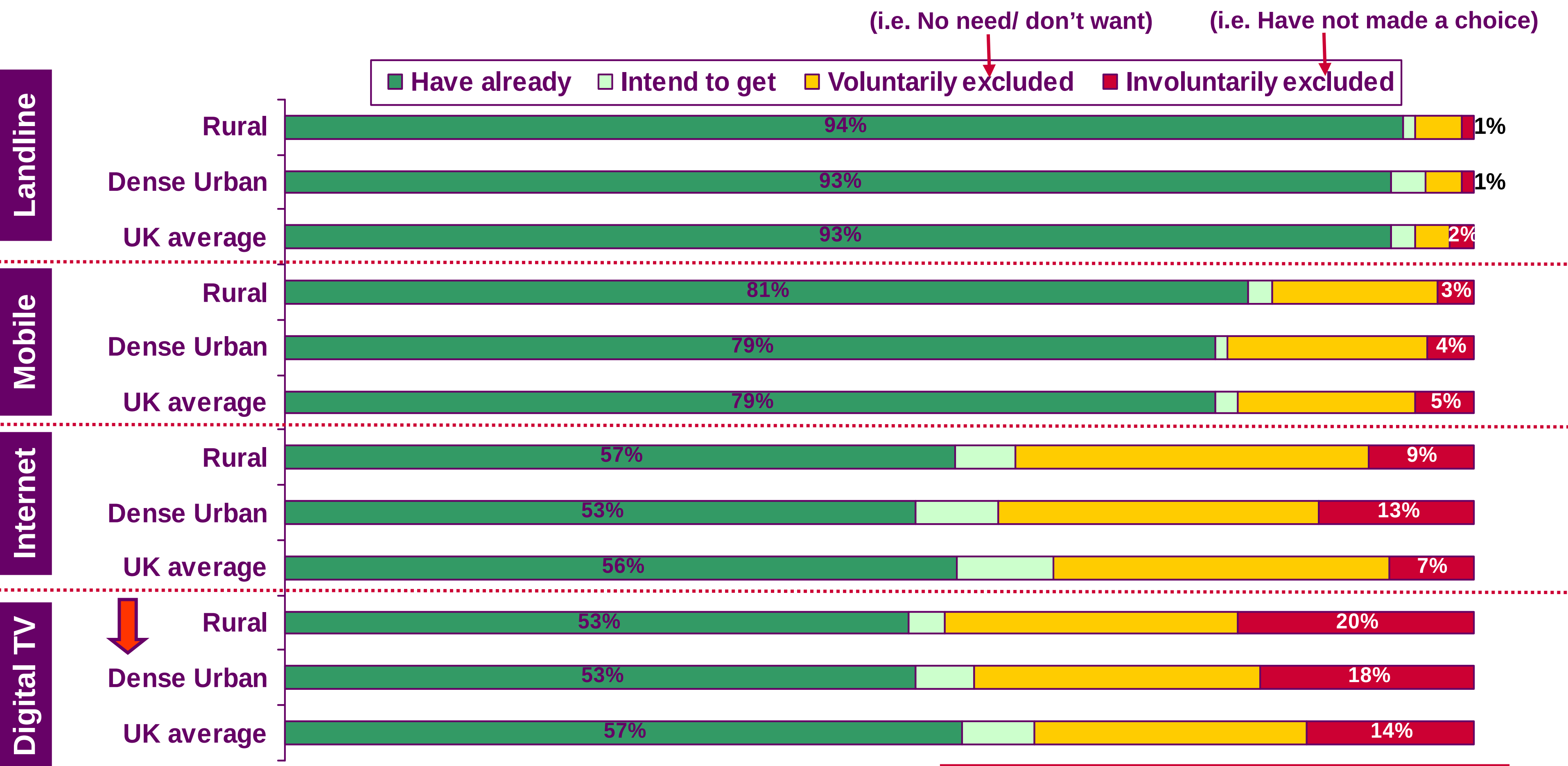
Ownership of technologies similar to UK average



Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

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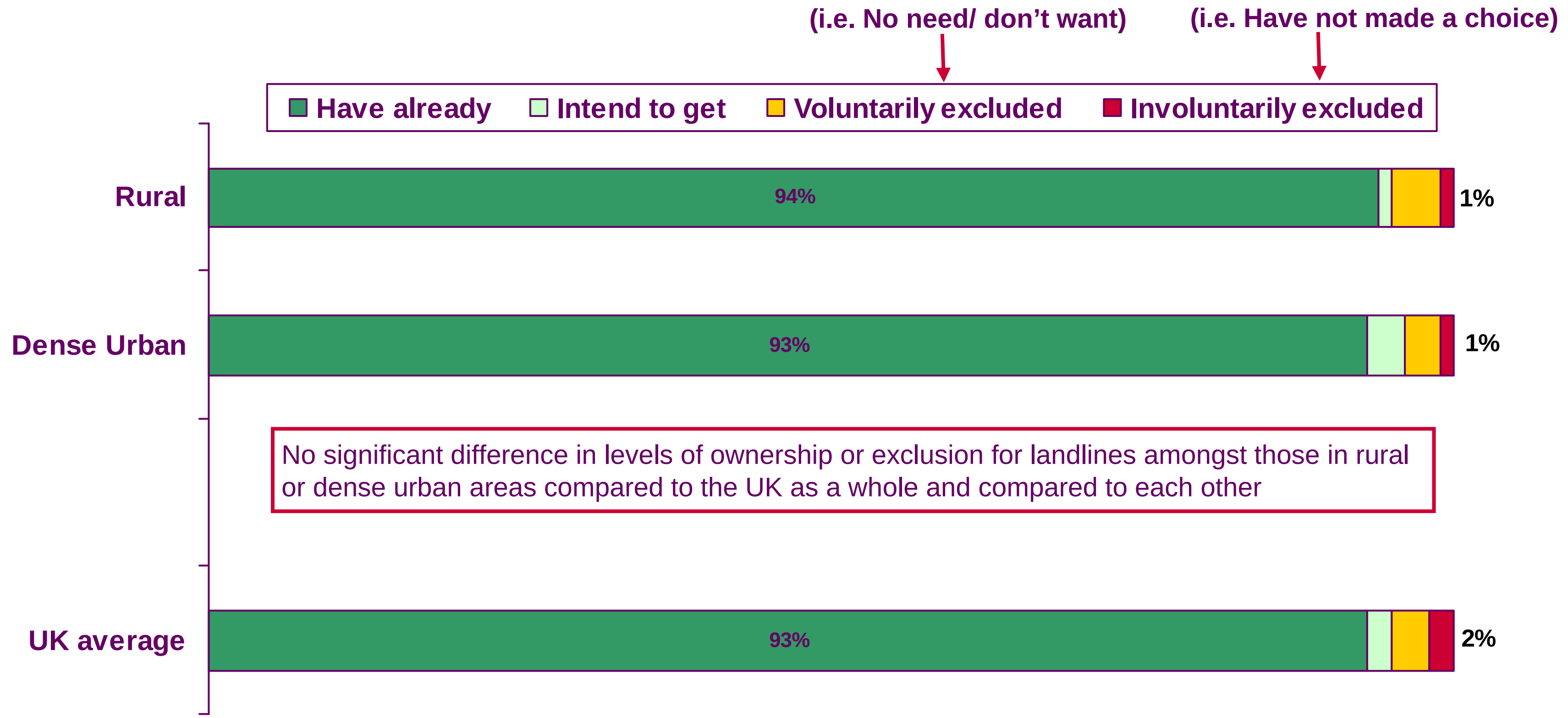
Landline ownership does not differ from UK average

Landline



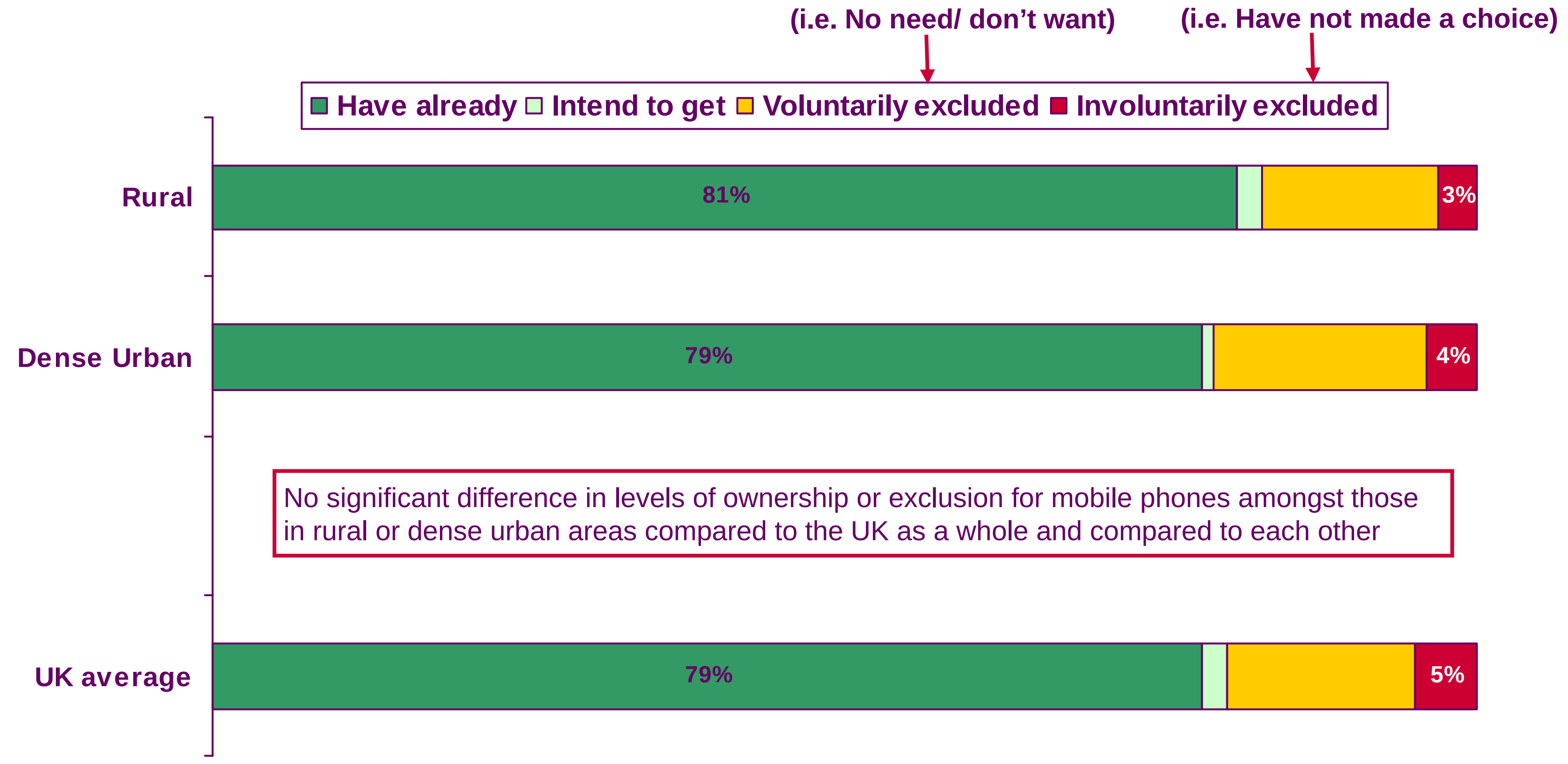
No significant difference in levels of ownership or exclusion for landlines amongst those in rural or dense urban areas compared to the UK as a whole and compared to each other

Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

Mobile

Mobile phone ownership does not differ from UK average

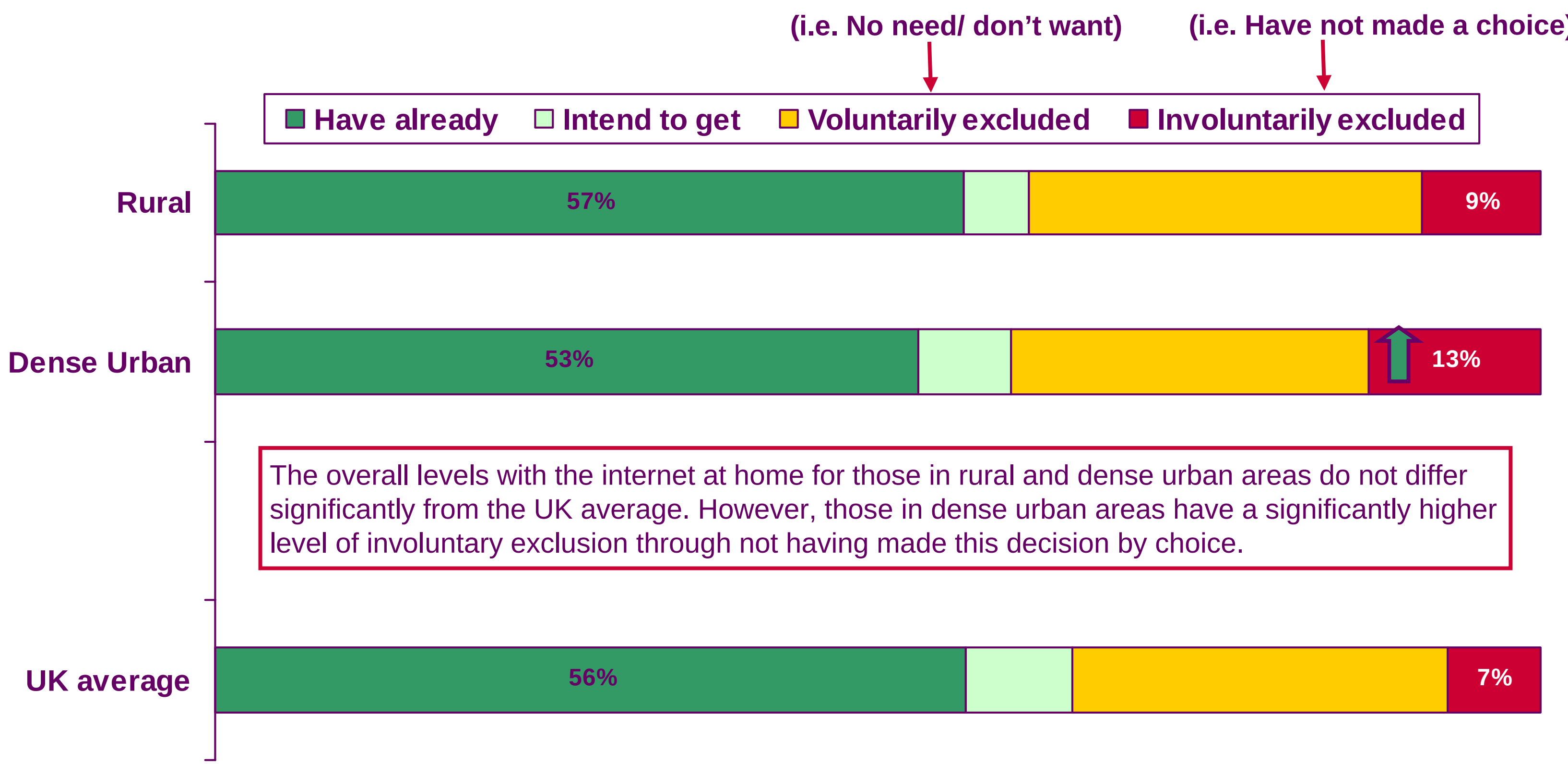


Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

Internet

Internet at home does not differ from UK average, but higher involuntary exclusion in dense urban areas



The overall levels with the internet at home for those in rural and dense urban areas do not differ significantly from the UK average. However, those in dense urban areas have a significantly higher level of involuntary exclusion through not having made this decision by choice.

Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

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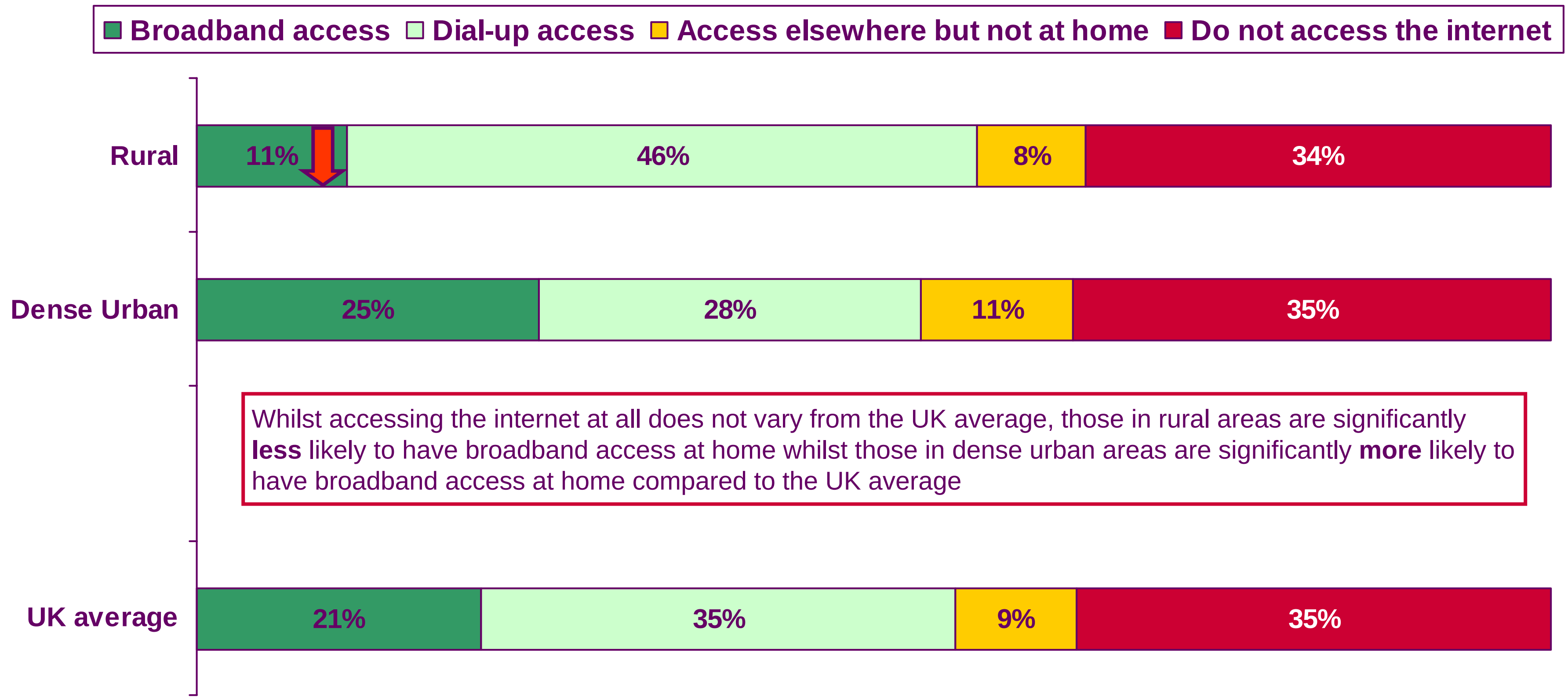
Those in rural areas less likely to have broadband access at home compared to dense urban areas and the UK overall



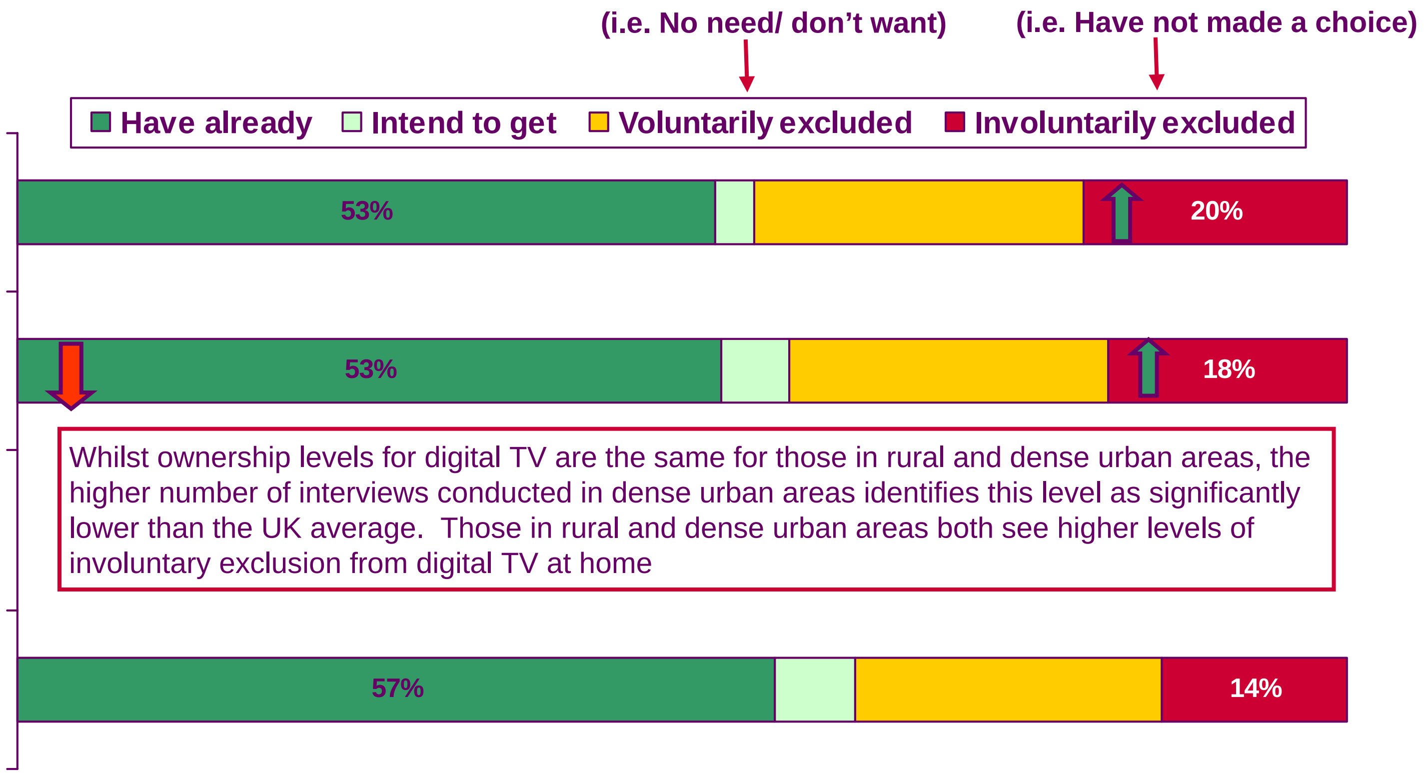
Whilst accessing the internet at all does not vary from the UK average, those in rural areas are significantly **less** likely to have broadband access at home whilst those in dense urban areas are significantly **more** likely to have broadband access at home compared to the UK average

Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Indicates significantly lower or higher levels accessing the Internet

Digital TV

Lower ownership levels for digital TV in dense urban areas, and higher involuntary exclusion for both areas



Whilst ownership levels for digital TV are the same for those in rural and dense urban areas, the higher number of interviews conducted in dense urban areas identifies this level as significantly lower than the UK average. Those in rural and dense urban areas both see higher levels of involuntary exclusion from digital TV at home

Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

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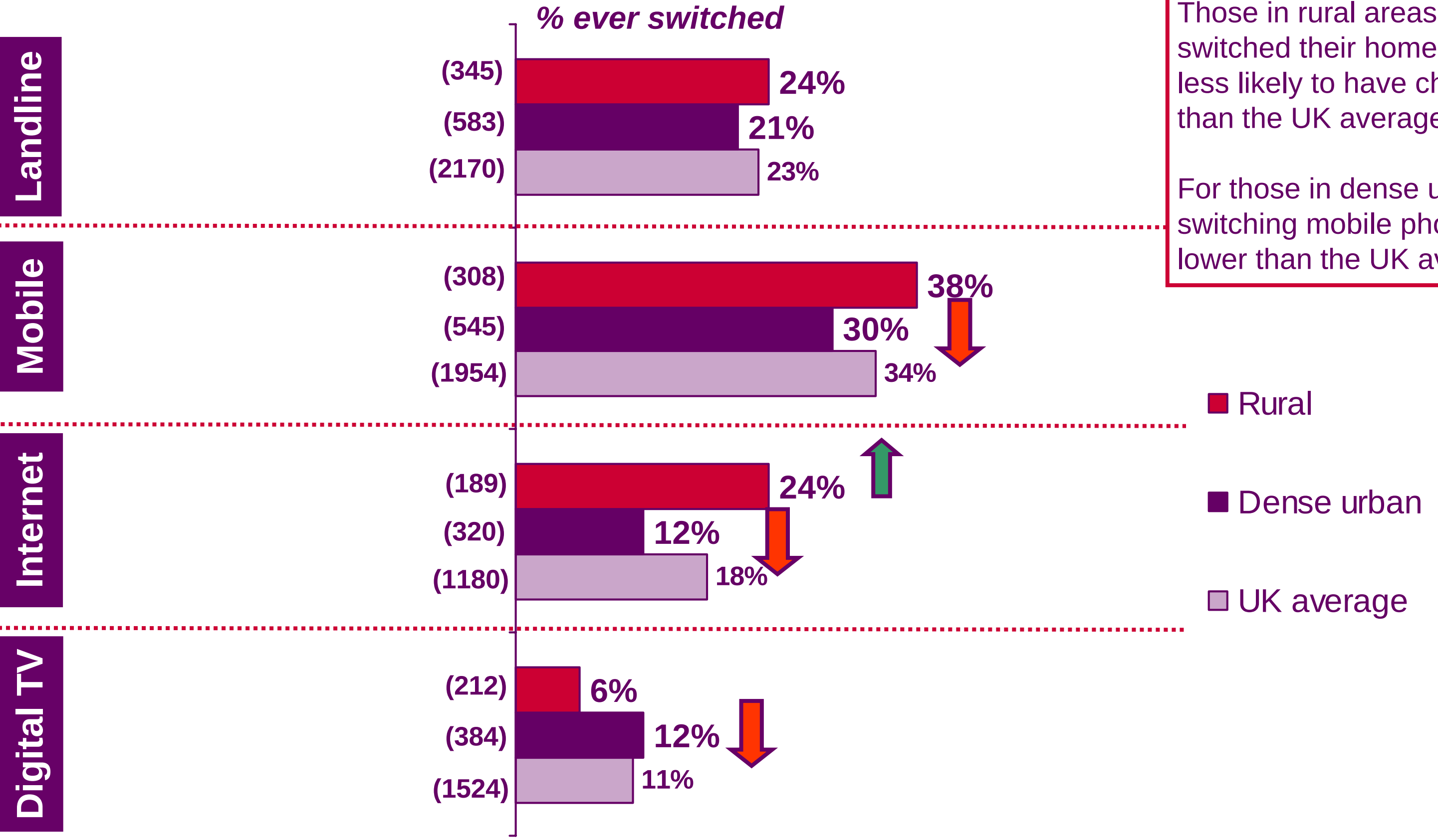
Levels of switching supplier mostly lower than UK average for those in dense urban areas



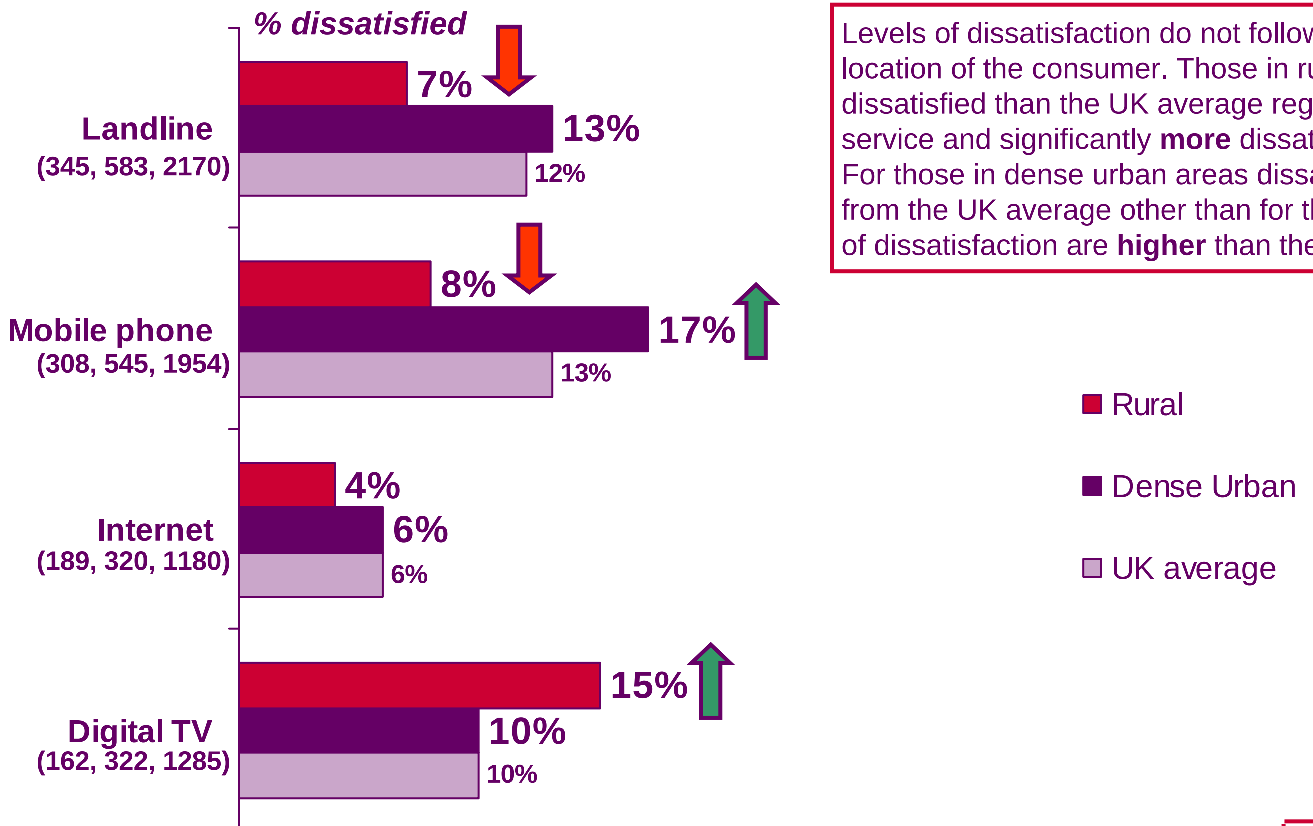
Those in rural areas are more likely to have ever switched their home internet service supplier and less likely to have changed their digital TV supplier than the UK average.

For those in dense urban areas the levels of switching mobile phone and internet suppliers are lower than the UK average.

Indicates significantly lower or higher levels of switching

Base : All with access to each service at home

Those in rural areas generally less dissatisfied than those in dense urban areas and the UK overall

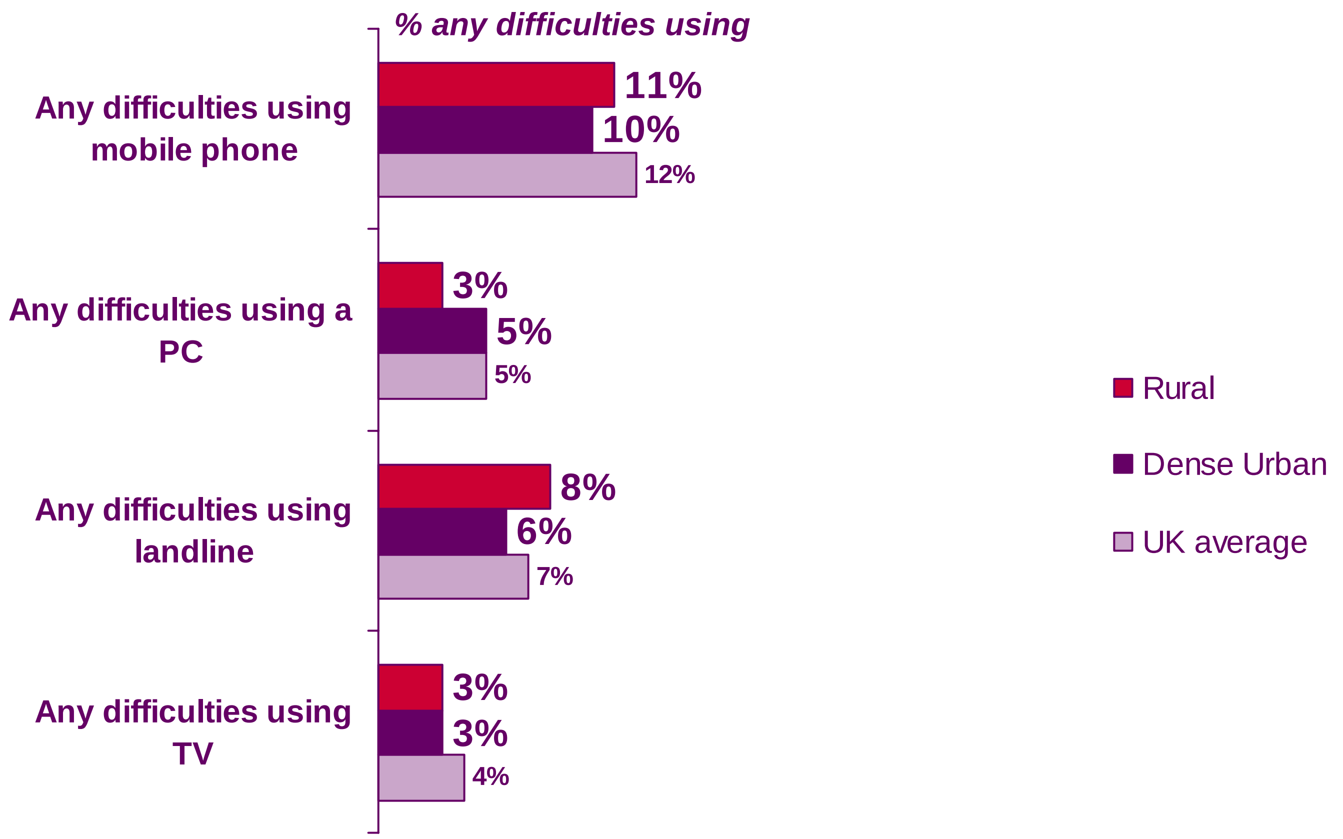


Levels of dissatisfaction do not follow a consistent pattern in terms of the location of the consumer. Those in rural areas are significantly **less** dissatisfied than the UK average regarding their landline and mobile phone service and significantly **more** dissatisfied regarding their digital TV service. For those in dense urban areas dissatisfaction does not differ significantly from the UK average other than for the mobile phone service, where levels of dissatisfaction are **higher** than the UK average.

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

Base : All with access to each service at home

Levels of difficulties using technologies do not differ from the UK average



Base : All respondents in rural areas (398), dense urban areas (687) and UK overall (2519)

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