

Ofcom Consumer Panel Research Quantitative Research Findings

Focus on Scotland






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Report outline

- This report compares the findings for residential consumers in **Scotland** with those for residential consumers in the **UK overall**
 - measures for England, Wales and Northern Ireland are also shown for comparison
- Differences shown of $\pm 5\%$ (where based on all respondents) are statistically significant
- Where findings for Scotland are significantly different from the UK average this has been shown using green and red arrows
 - to indicate significantly higher or lower measures for Scotland
- 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 Scotland compared to UK average

Understanding

- More likely to understand the terms digital TV and digital radio - through being able to correctly describe what the terms mean
- Less likely to understand the term digital switchover

Keeping informed

- Less likely to keep informed of developments in communications technologies at all - regarding mobile phones in particular
- More likely to nominate only one (rather than multiple) sources of information or advice on communications services

Ownership, use and satisfaction

- No real difference in terms of ownership levels for mobile phone, internet and digital TV, but less likely to have a landline at home
- Less likely overall to have ever switched suppliers for their home communications services
- Less likely to access the internet at all
- Less likely to be dissatisfied with their home communications services
- More likely to have any difficulties using a PC, but no real difference regarding other technologies

More likely to understand digital TV & digital radio

Aware of each communications term

Not aware

Misinformation

Can't describe

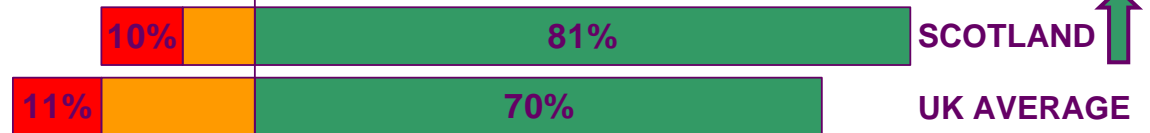
Understand

Broadband



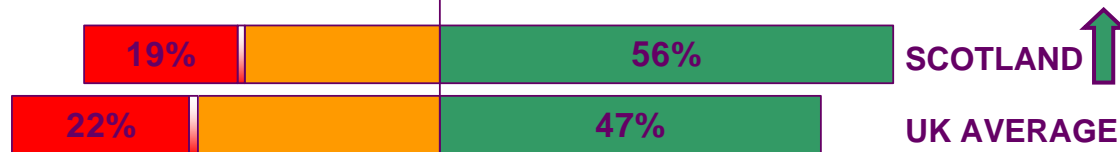
UK AVERAGE

Digital TV



UK AVERAGE

Digital radio



UK AVERAGE

3G

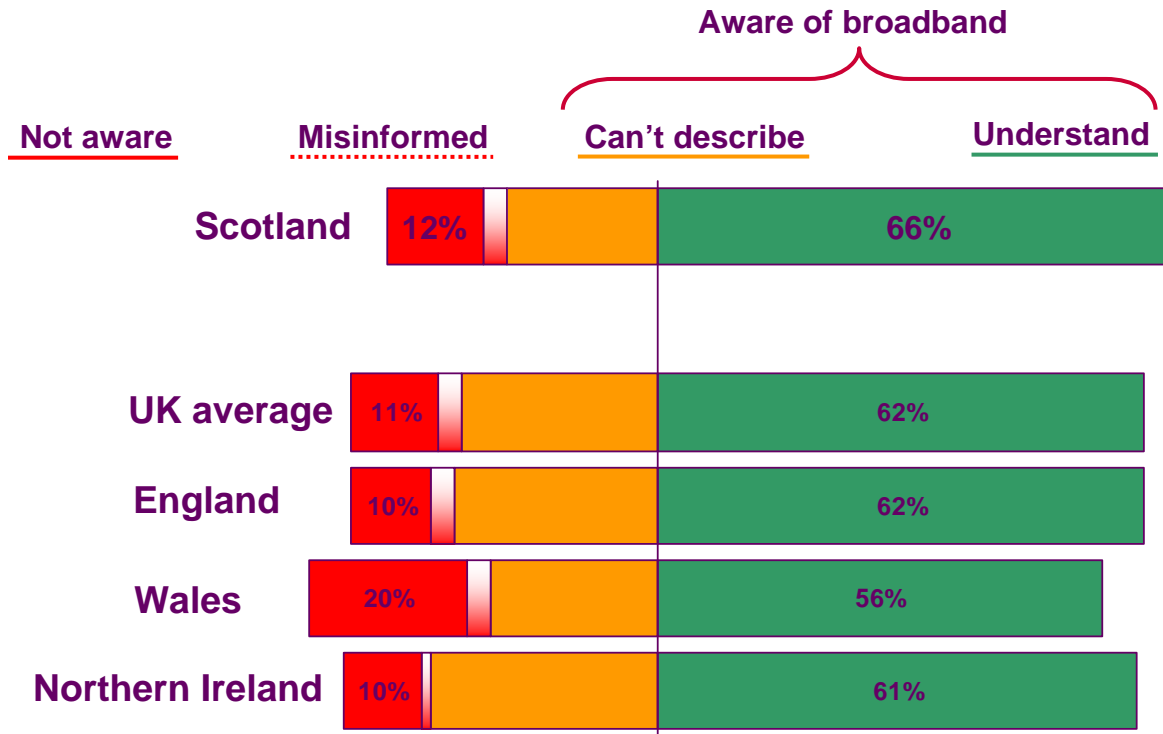


UK AVERAGE

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

Base : All respondents in Scotland (426) and UK overall (2519)

No significant difference in awareness or understanding of broadband

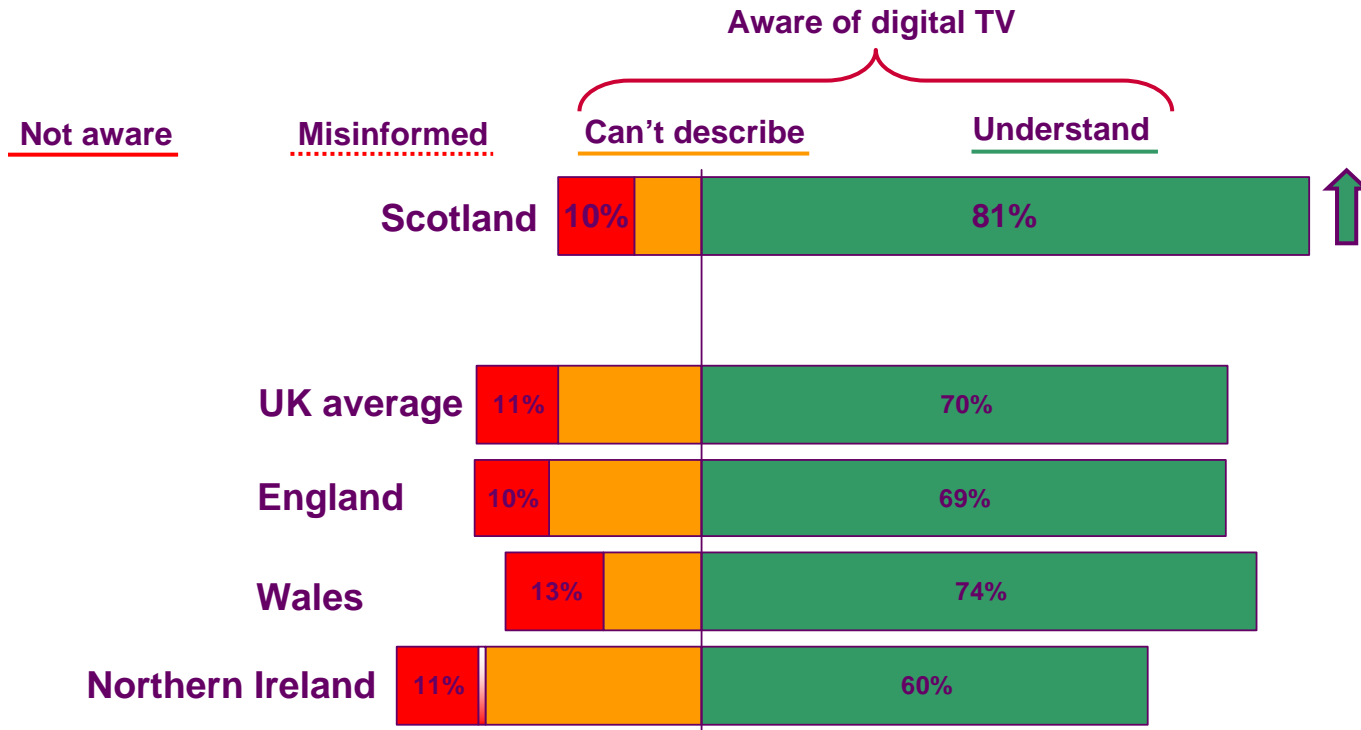


Amongst consumers in Scotland, awareness and understanding of broadband is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

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

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

More likely to understand the term digital TV compared to UK average

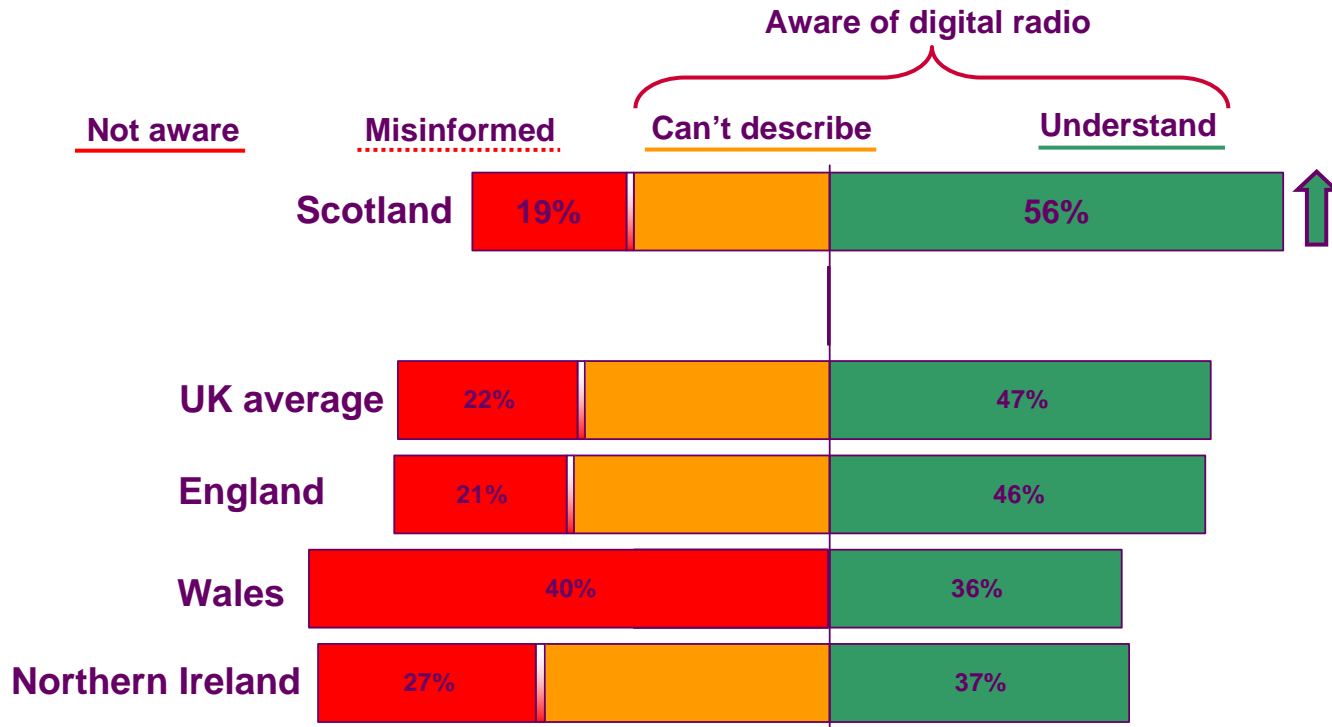


Amongst consumers in Scotland, awareness and understanding of digital TV is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

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

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

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

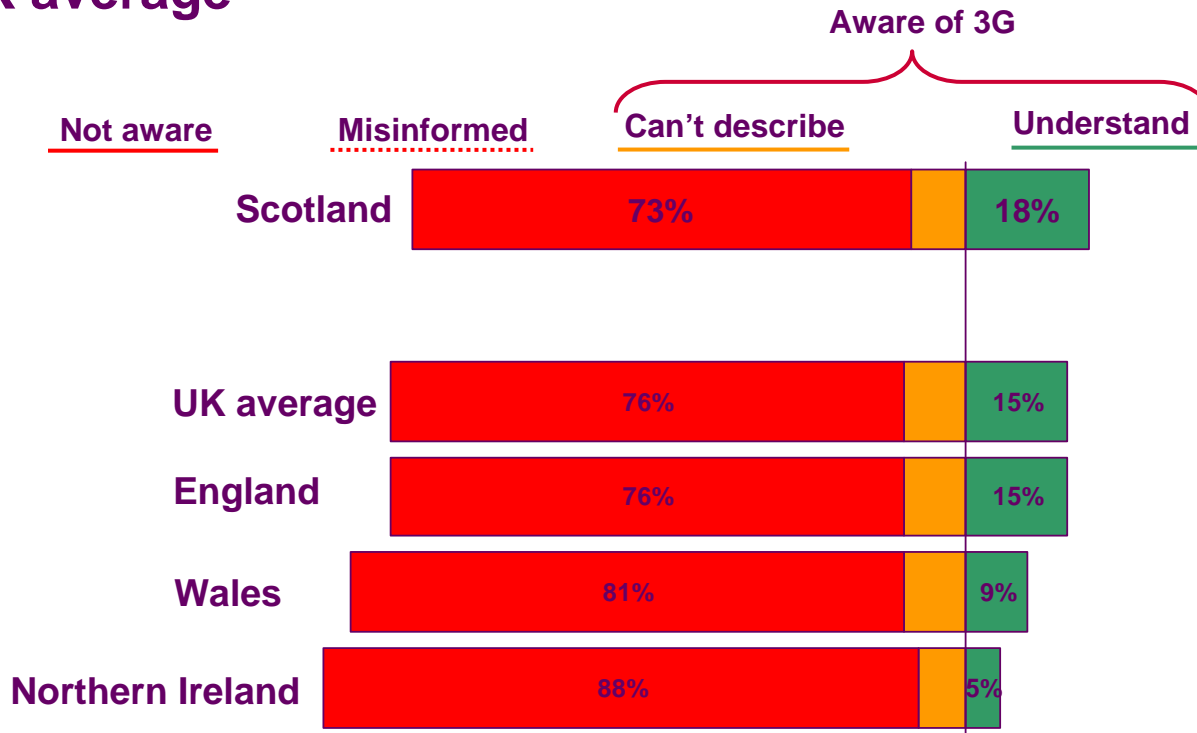


Amongst consumers in Scotland, awareness and understanding of digital radio is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

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

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

No significant difference in awareness or understanding of 3G compared to UK average

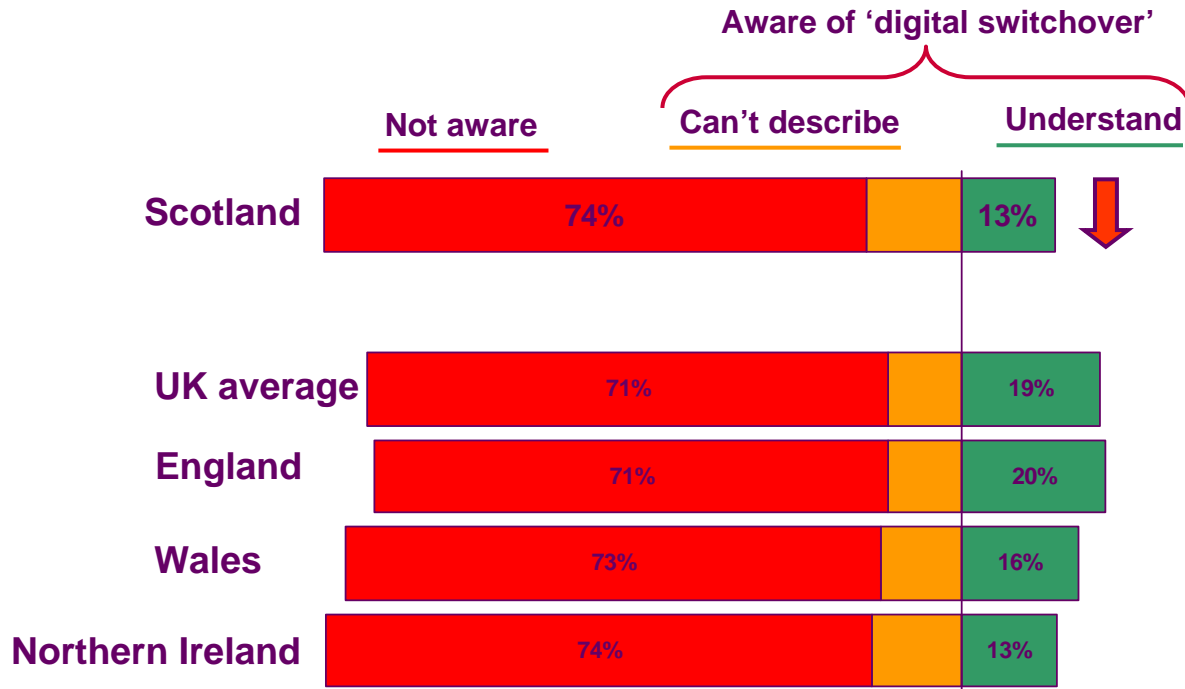


Amongst consumers in Scotland, awareness and understanding of 3G is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

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

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

Less likely than UK average to understand ‘digital switchover’

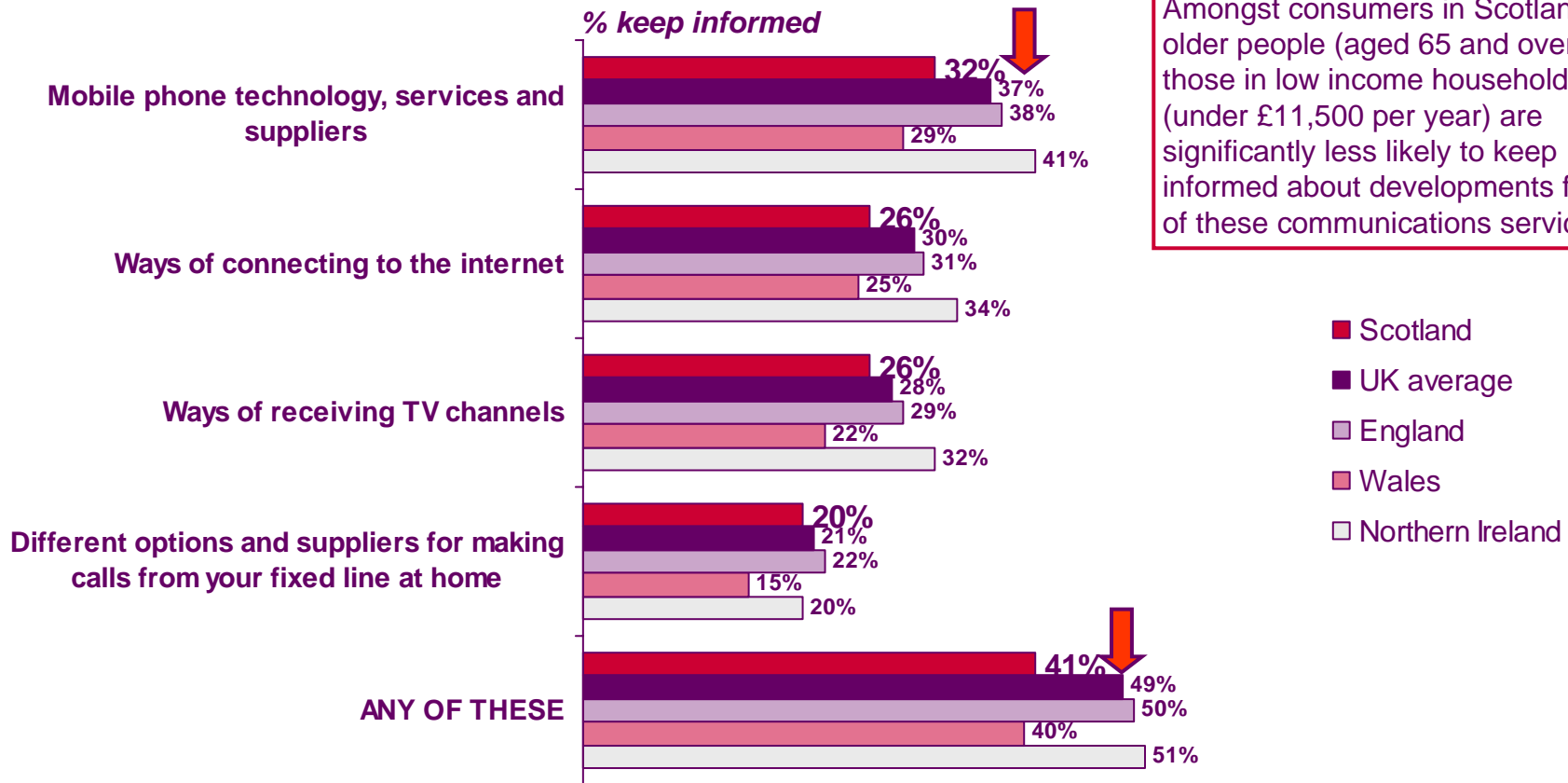


Amongst consumers in Scotland, older people (aged 65 and over) do not differ from Scotland as a whole in terms of either awareness or understanding of digital switchover. Those in low income households (under £11,500 per year) do not differ in terms of understanding, but are significantly less likely to have heard of ‘digital switchover.’

  Indicates significantly lower or higher levels of understanding

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

Significantly less likely to keep informed compared to UK average



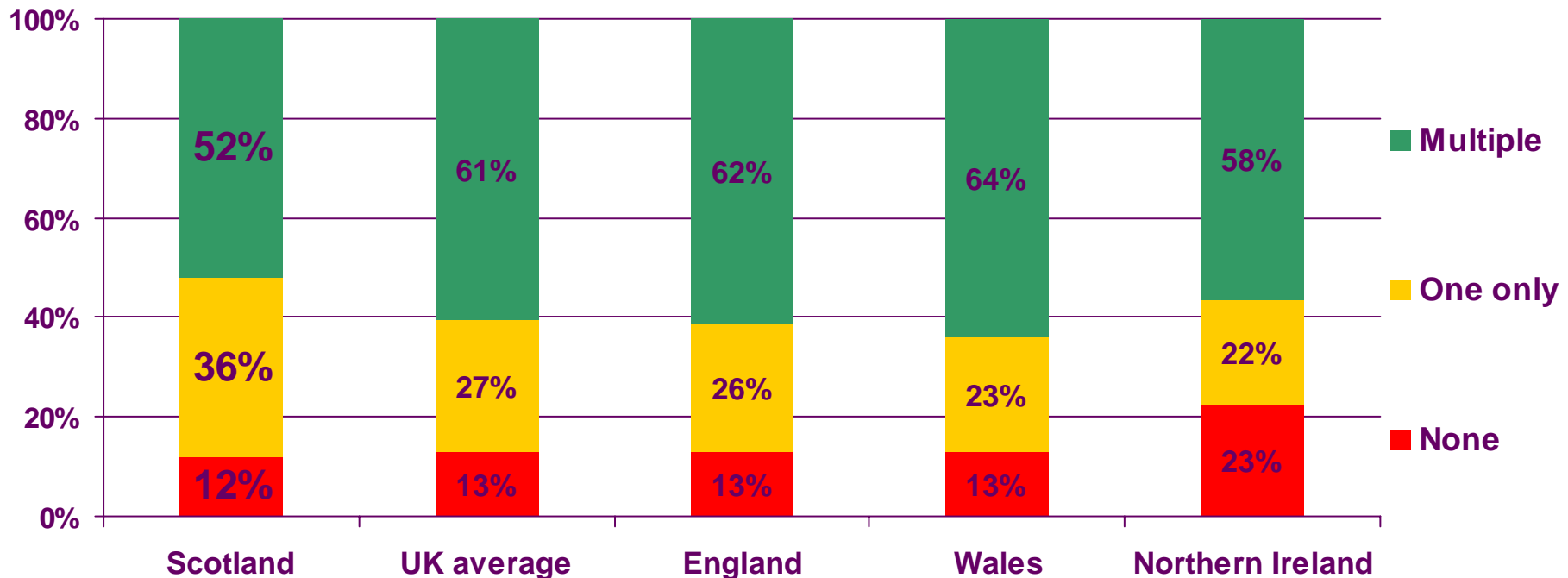
Amongst consumers in Scotland, older people (aged 65 and over) and those in low income households (under £11,500 per year) are significantly less likely to keep informed about developments for any of these communications services

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

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

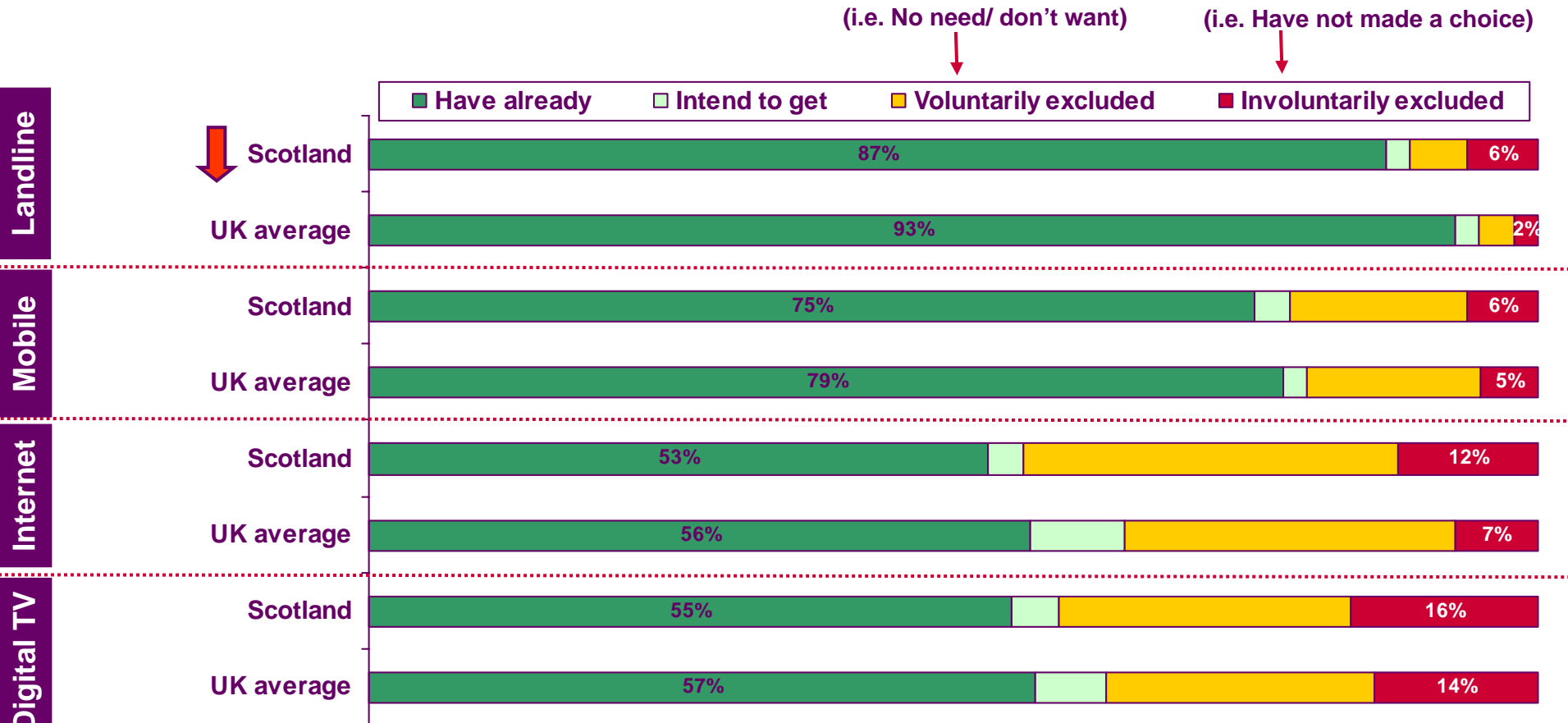
More likely than UK average to have only one source of advice or information on communications services

Amongst consumers in Scotland, 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 Scotland (426), England (1398), Wales (352) and Northern Ireland (343)

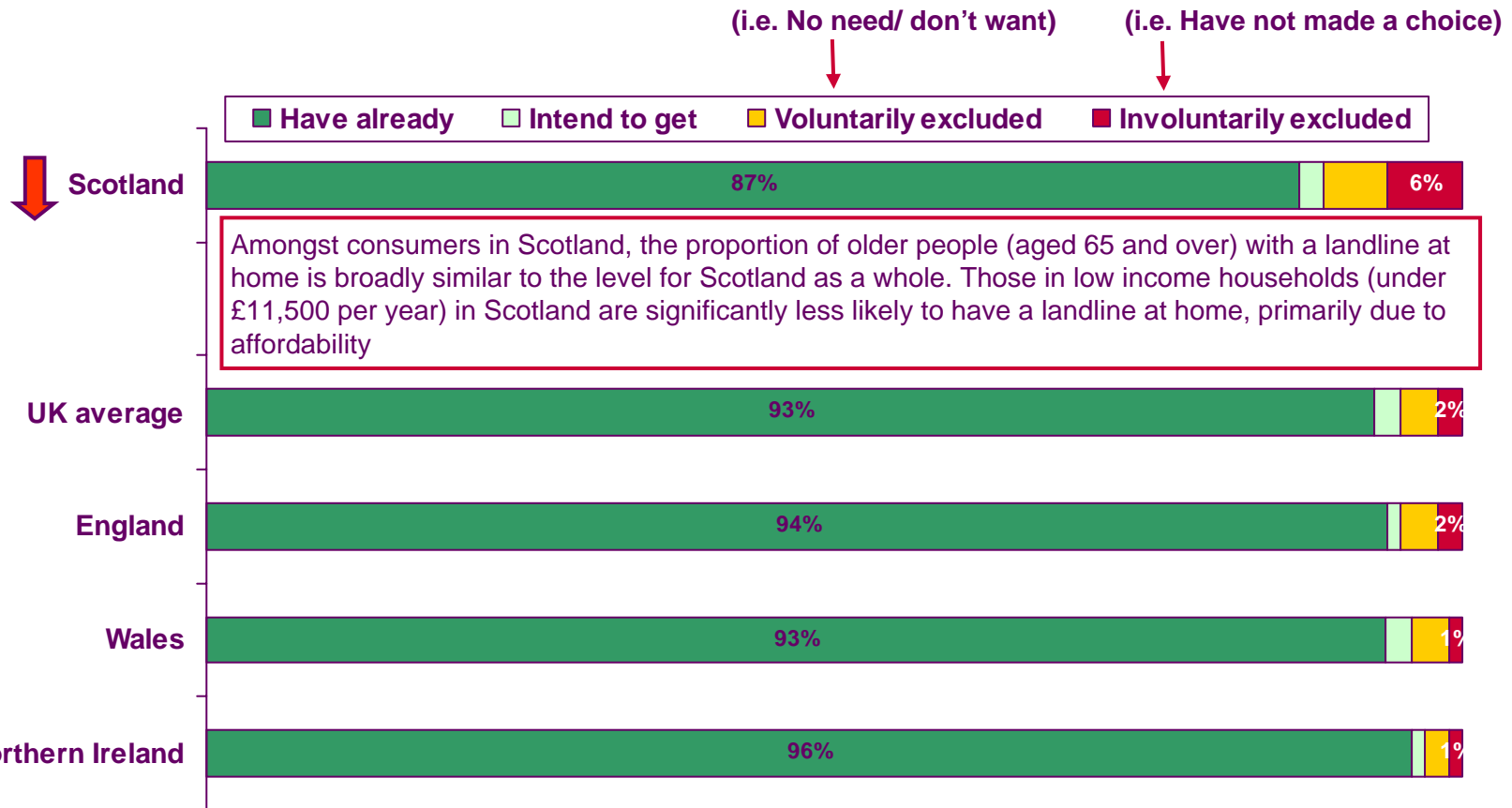
Ownership of most technologies broadly similar to the UK average



Base : All respondents in Scotland (426) and UK overall (2519)

Indicates significantly lower or higher levels of ownership

Lower ownership and higher involuntary exclusion

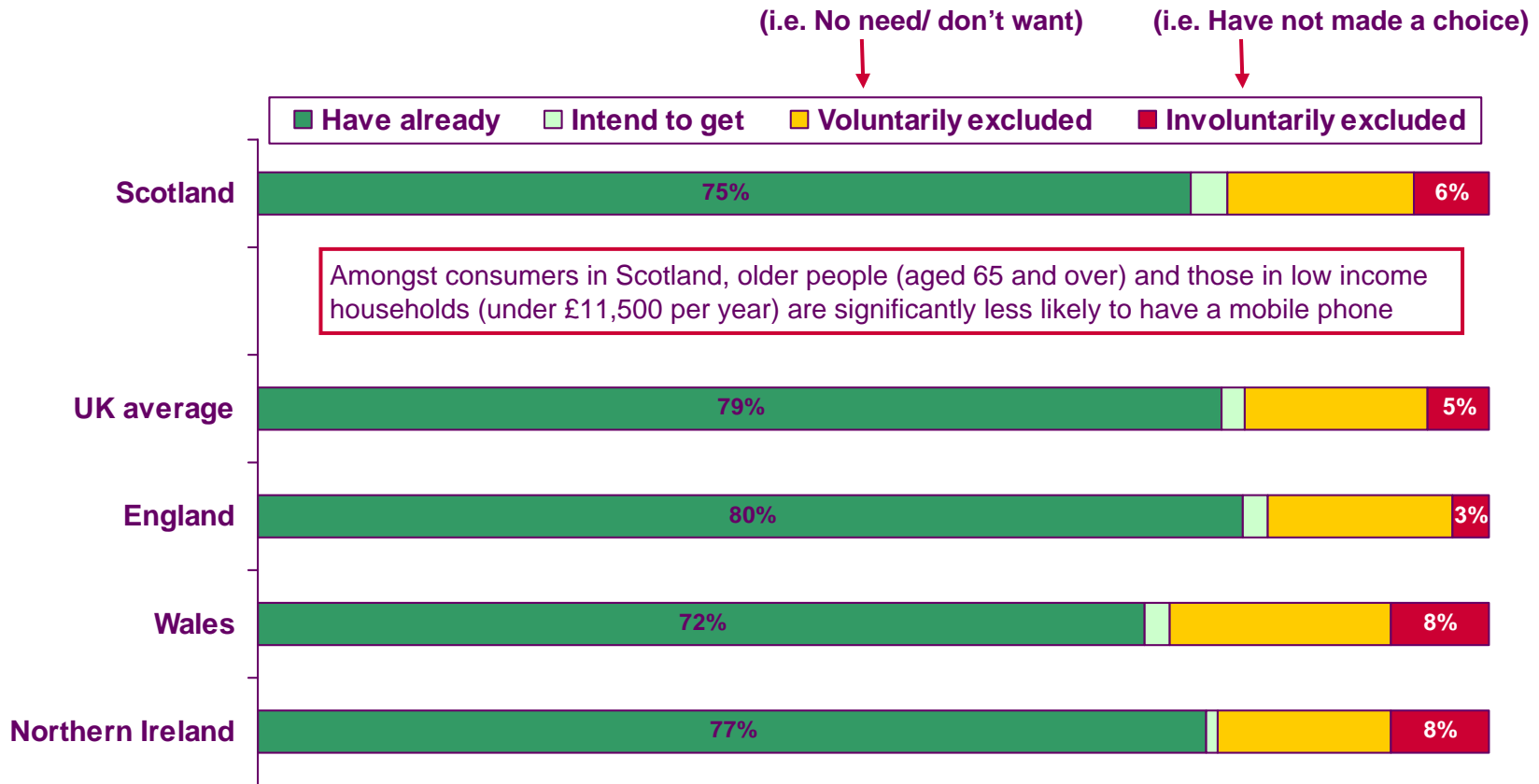


Landline

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

Indicates significantly lower or higher levels of ownership

Mobile phone ownership broadly similar to the UK average



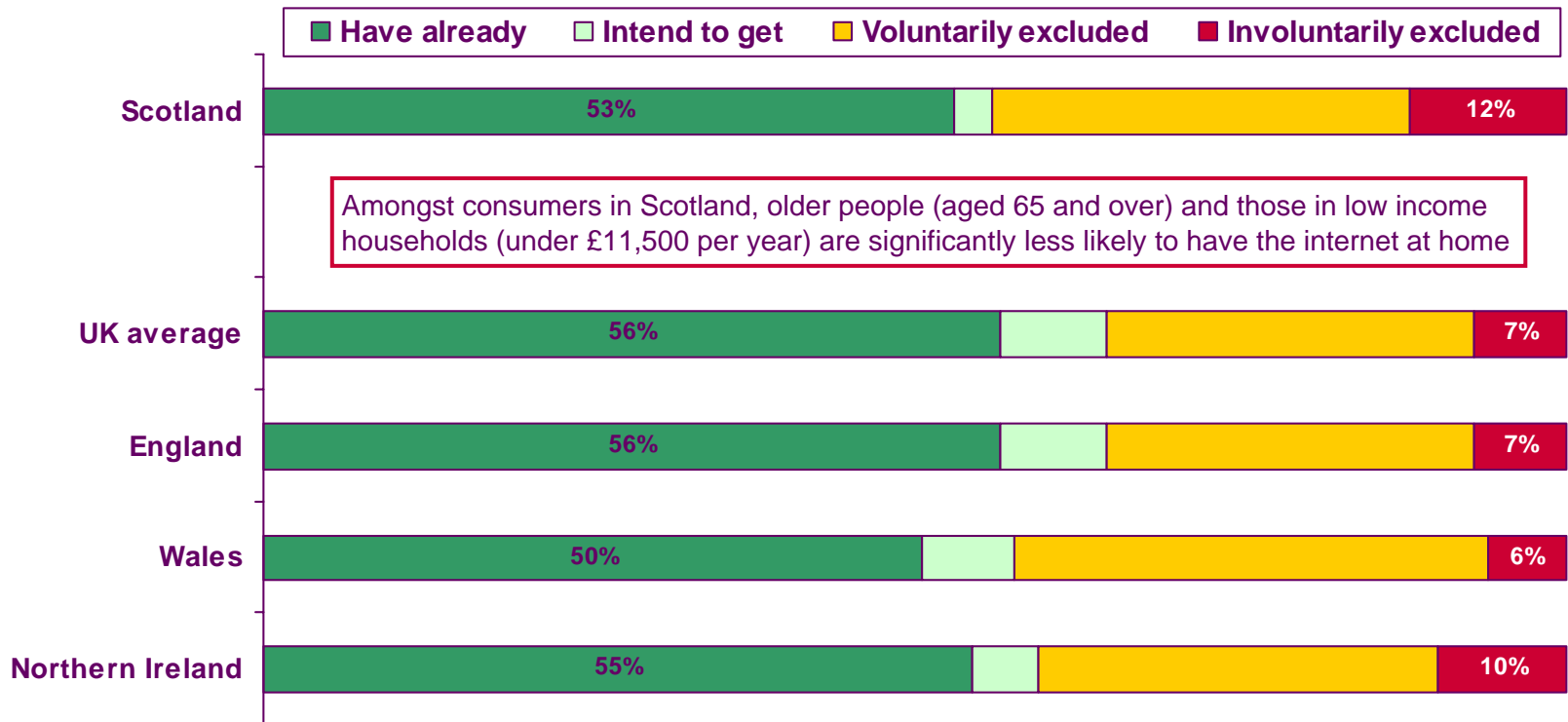
Base : All respondents in Scotland (426), England (1398), Wales (352) and Northern Ireland (343)

Indicates significantly lower or higher levels of ownership

More likely to be involuntarily excluded from internet ownership

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

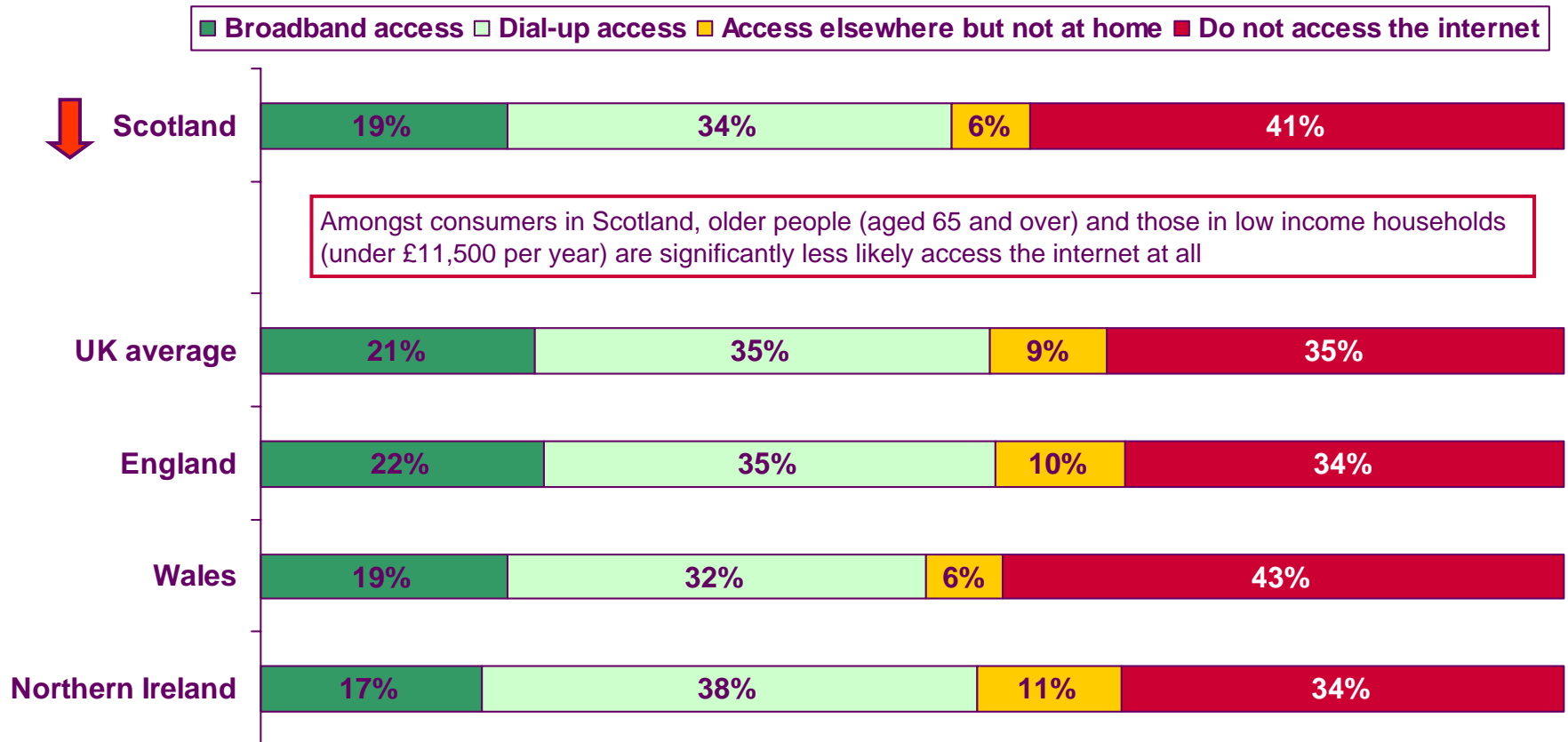
(i.e. Have not made a choice)



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

Indicates significantly lower or higher levels of ownership

Just as likely as other nations to have broadband internet access, but on the whole are less likely to access the internet



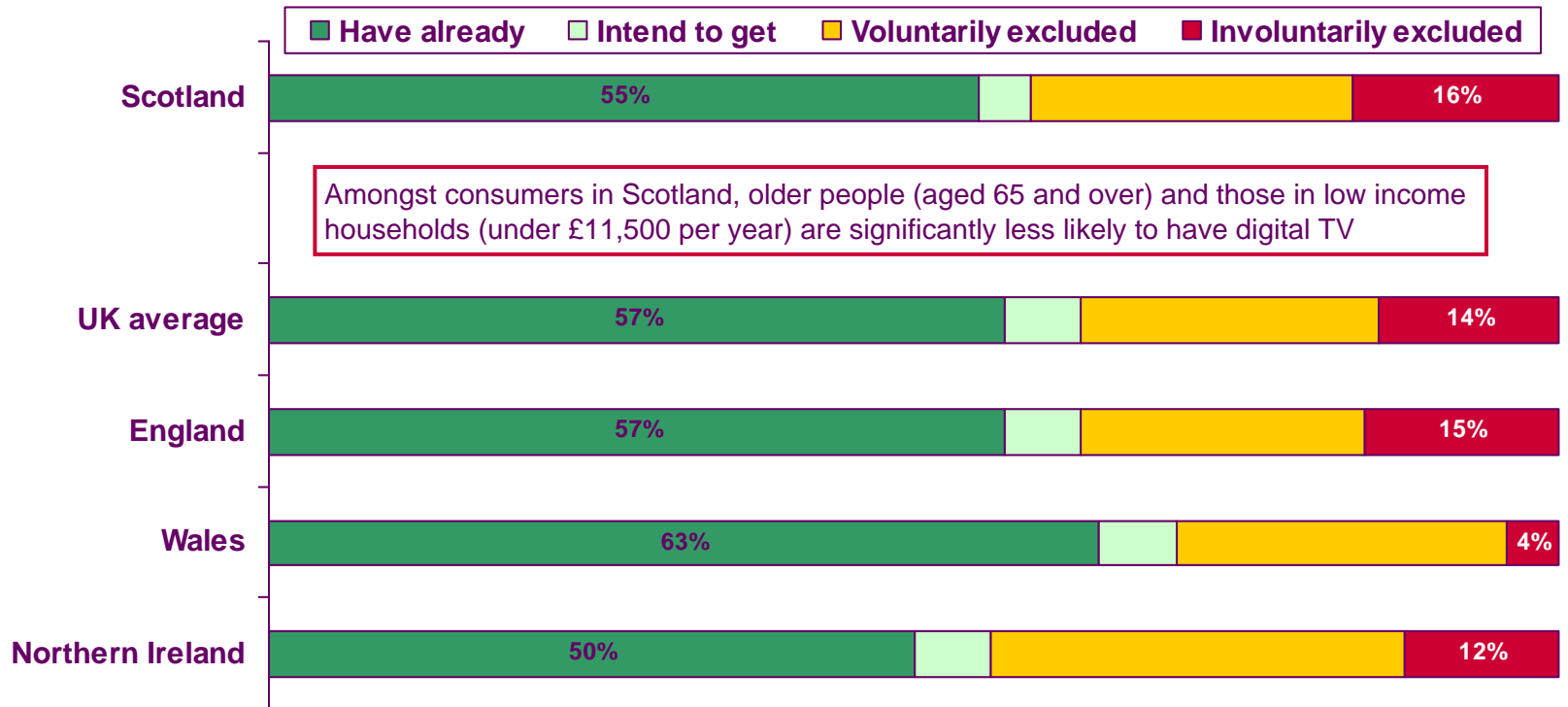
Base : All respondents in Scotland (426), England (1398), Wales (352) and Northern Ireland (343)

Indicates significantly lower or higher levels accessing the Internet

Ownership of digital TV broadly similar to the UK average

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

(i.e. Have not made a choice)



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

Indicates significantly lower or higher levels of ownership

Lower levels of switching phone service – particularly mobile network

Landline



Mobile



Internet



Digital TV



In Scotland 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 and digital TV.

Ownership levels for landlines and mobile phones amongst those in low income households in Scotland do not differ significantly from Scotland as a whole.

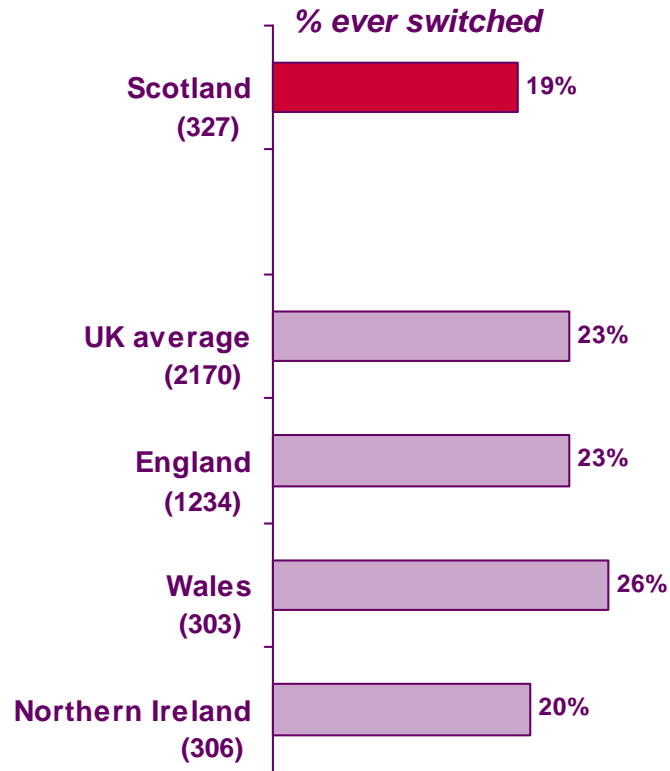
■ Scotland

■ UK average

Base : All with access to each service at home

Indicates significantly lower or higher levels of switching

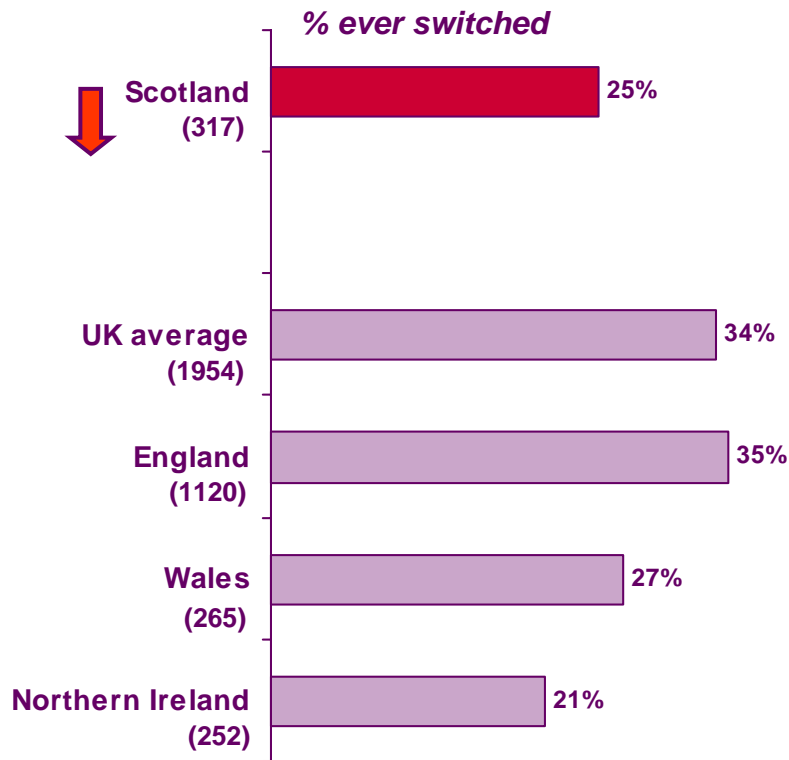
No significant difference in switching landline supplier compared to the UK average



Base : All with a landline at home

  Indicates significantly lower or higher levels of switching

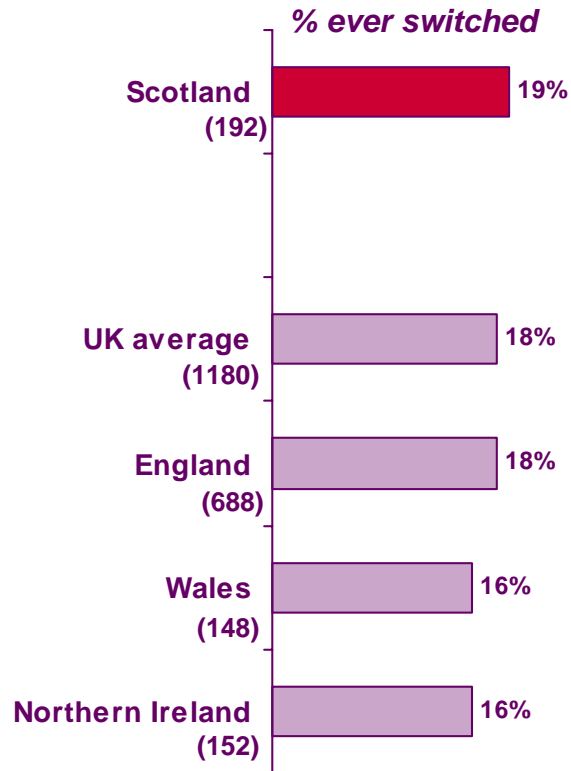
Less likely to have ever switched mobile phone network compared to the UK average



Base : All with a mobile phone

  Indicates significantly lower or higher levels of switching

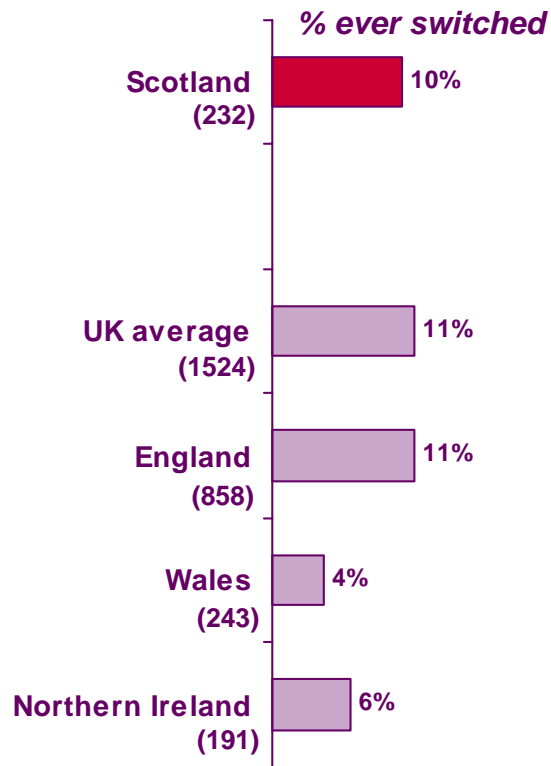
No significant difference in internet customers switching supplier



Base : All with internet access at home

 Indicates significantly lower or higher levels of switching

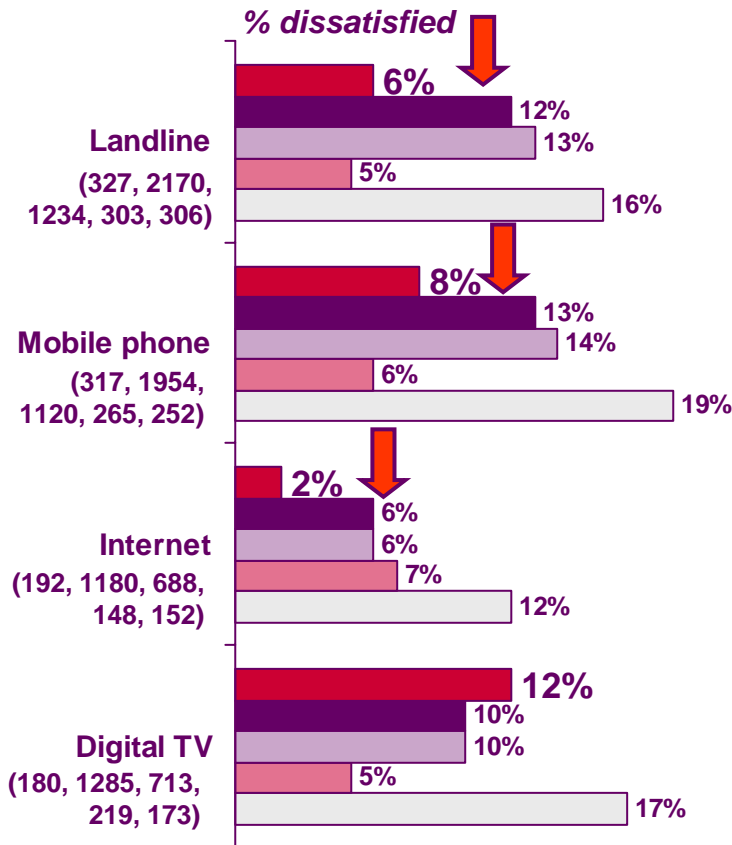
No significant difference in digital TV customers switching supplier compared to the UK average



Base : All with digital TV at home

 Indicates significantly lower or higher levels of switching

Lower proportion dissatisfied with their telephone and internet services



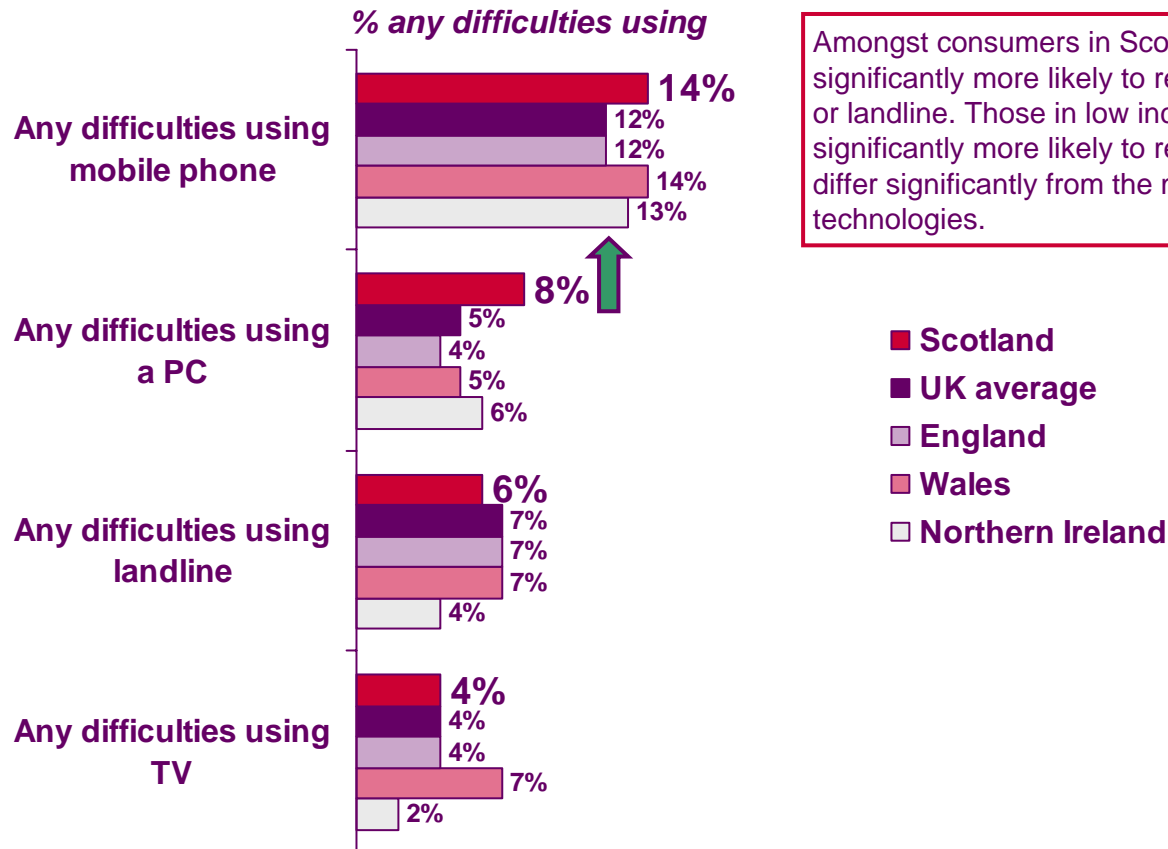
In Scotland sample sizes for older people (aged 65 and over) who have each of the technologies at home are too small to make any robust comparisons. The same is true for those in low income households (under £11,500 per year) regarding internet and digital TV. Levels of dissatisfaction regarding landlines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

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

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

Base : All with access to each service at home

More likely to have difficulties using a PC than other nations – but similar levels of difficulties using other technologies



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



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

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