Ofcom Consumer Panel Research
Quantitative Research Findings

Focus on England

June 2006

Report outline

- This report compares the findings for residential consumers in England with those residential consumers in the **UK overall**
  - findings for England are unlikely to differ significantly from the overall UK average due to the relative size of the population of England
  - measures for the 2004 survey are also shown for comparison
- Differences shown of ±3% (where based on all respondents) are statistically significant
- Where findings for England are significantly different from the UK average or measures have changed significantly between 2004 and 2005 this has been shown using green and red arrows
  - to indicate significantly higher or lower measure for England ⇩ ⇧
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

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Profile of vulnerable groups by nation

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Older people (aged 65 plus)	16%	16%	18%	14%	16%
Rural	13%	16%	**22%**	**35%**	12%
Limiting long term illness/ disability	14%	**18%**	**29%**	15%	15%
Household income under £11,500	26%	**32%**	**43%**	29%	27%
TOTAL NATION SPLIT	**84%**	**8%**	**5%**	**3%**	**100%**
INTERVIEWS CONDUCTED	***1507***	***460***	***366***	***356***	***2689***

Source: Census 2001-Office of National Statistics and for rural areas Business Geographic 'Urban Indicator'

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Summary of key findings for consumers in England – comparison to UK and change since 2004

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Knowledge

- Broadband and digital TV are the most understood, with low awareness of 3G and VoIP
- Increase in understanding of broadband, digital TV and 3G since 2004
- Most likely to keep informed about developments for mobile phone and digital TV services, but a decline in keeping informed about mobile phone and internet services since 2004
- Friends and family are the most popular source of advice, and have increased in popularity since 2004, along with online sources
- Awareness of digital switchover lower than the other UK nations, but a significant increase in awareness since 2004

Ownership

- Consumers in England are the most likely to have internet at home and match Wales as the most likely to have digital TV
- Increase since 2004 in ownership digital TV and broadband internet access, despite no increase in overall internet access

Usage

- Relatively narrow use made of mobile phones in terms of types of use, but consumers in England are the most likely to make a broad use of the internet, in particular for work/ studies information compared to other UK nations

Attitudes

- Levels of concerns or worries regarding services amongst owners have increased since 2004, relating to costs for landline and mobile phone and digital TV services, and to control/ security for internet services
- Most likely to rate landline and mobile phone services as essential, with an increase in the importance of mobile phone and a decrease in the importance of landline since 2004
- Relatively few consumers are dissatisfied with the services they use, and dissatisfaction with the mobile phone service has decreased since 2004
- Most likely to have ever switched supplier for their mobile phone and landline phone services, with the incidence of having ever switched landline service supplier increasing significantly since 2004

Awareness and understanding of communication terms - comparison to UK

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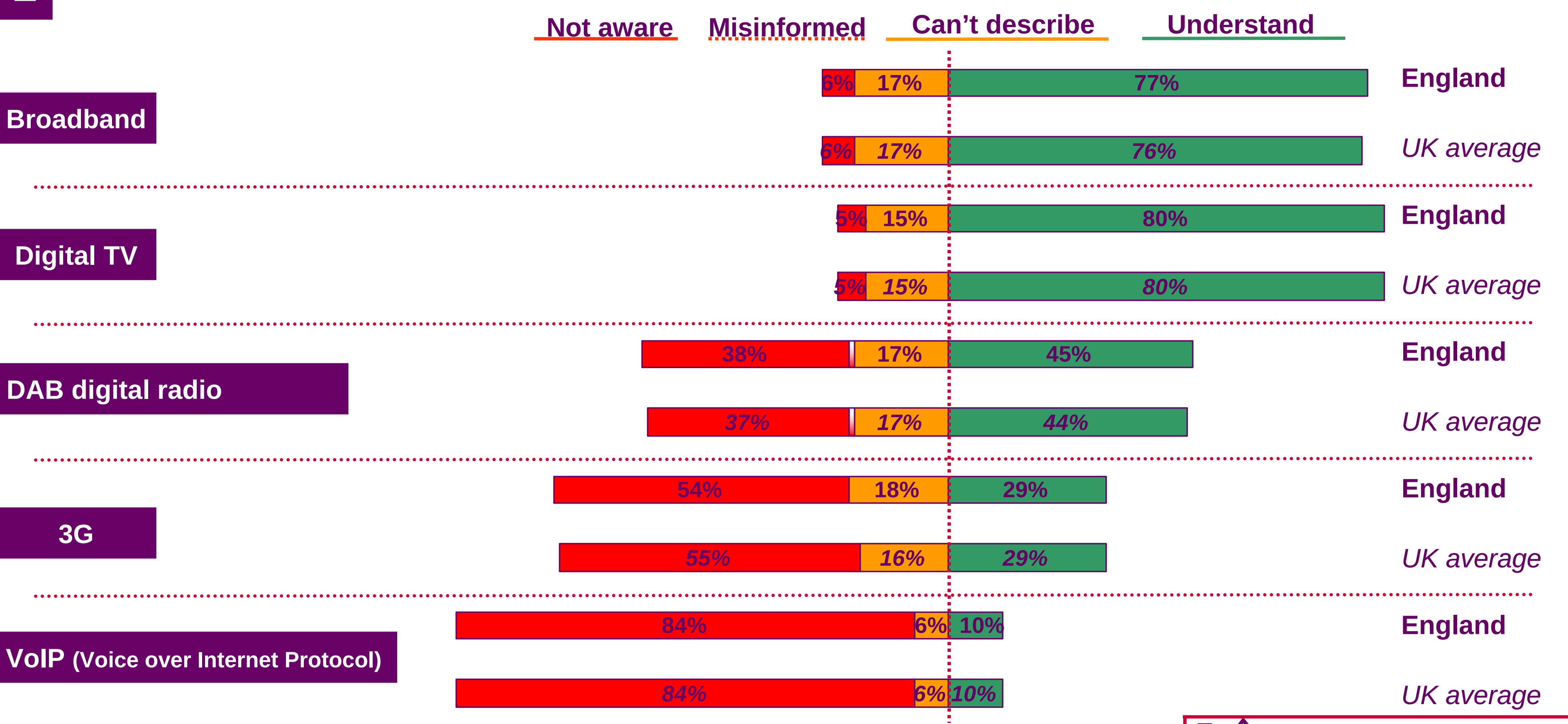
Knowledge

ENGLAND

- High overall awareness for broadband and digital TV, moderate for DAB digital radio, and low for 3G and VoIP
- Amongst consumers in England, awareness of each of the communication terms is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)



Indicates significantly lower or higher than **2005 UK average**

Base : All respondents England (1507) and UK overall (2,689)

Awareness and understanding of communication terms - change since 2004

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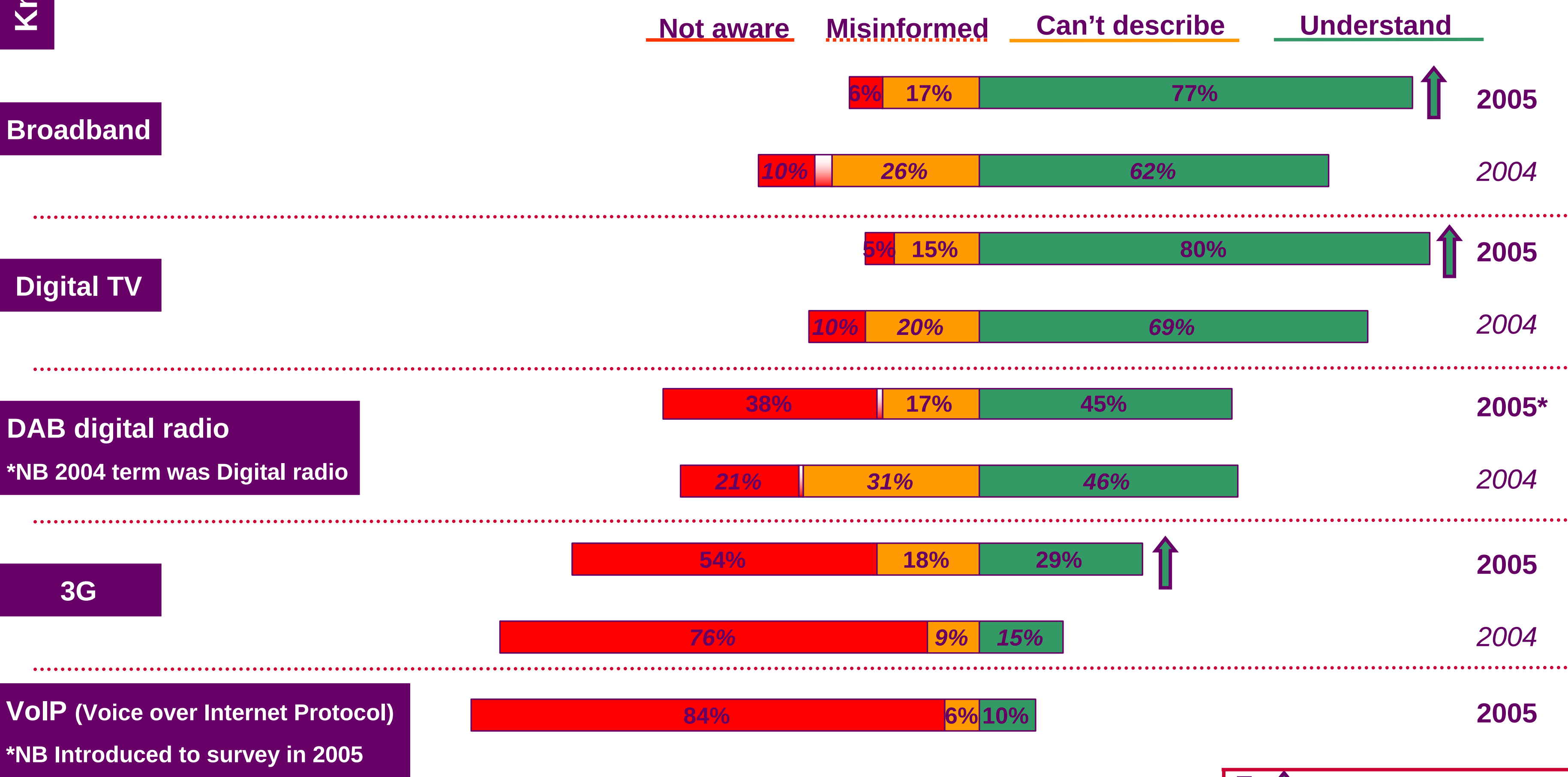
Knowledge

ENGLAND

- Significant increases amongst consumers in England in awareness of the communications terms broadband, digital TV and 3G
- The greatest increases since 2004 are amongst those consumers in low income households and older people aged 65+



Indicates significantly lower or higher than **2004 England**

Base : All respondents in England 2005 (1507) and 2004 (1398)

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Overall awareness of communications services - comparison to UK

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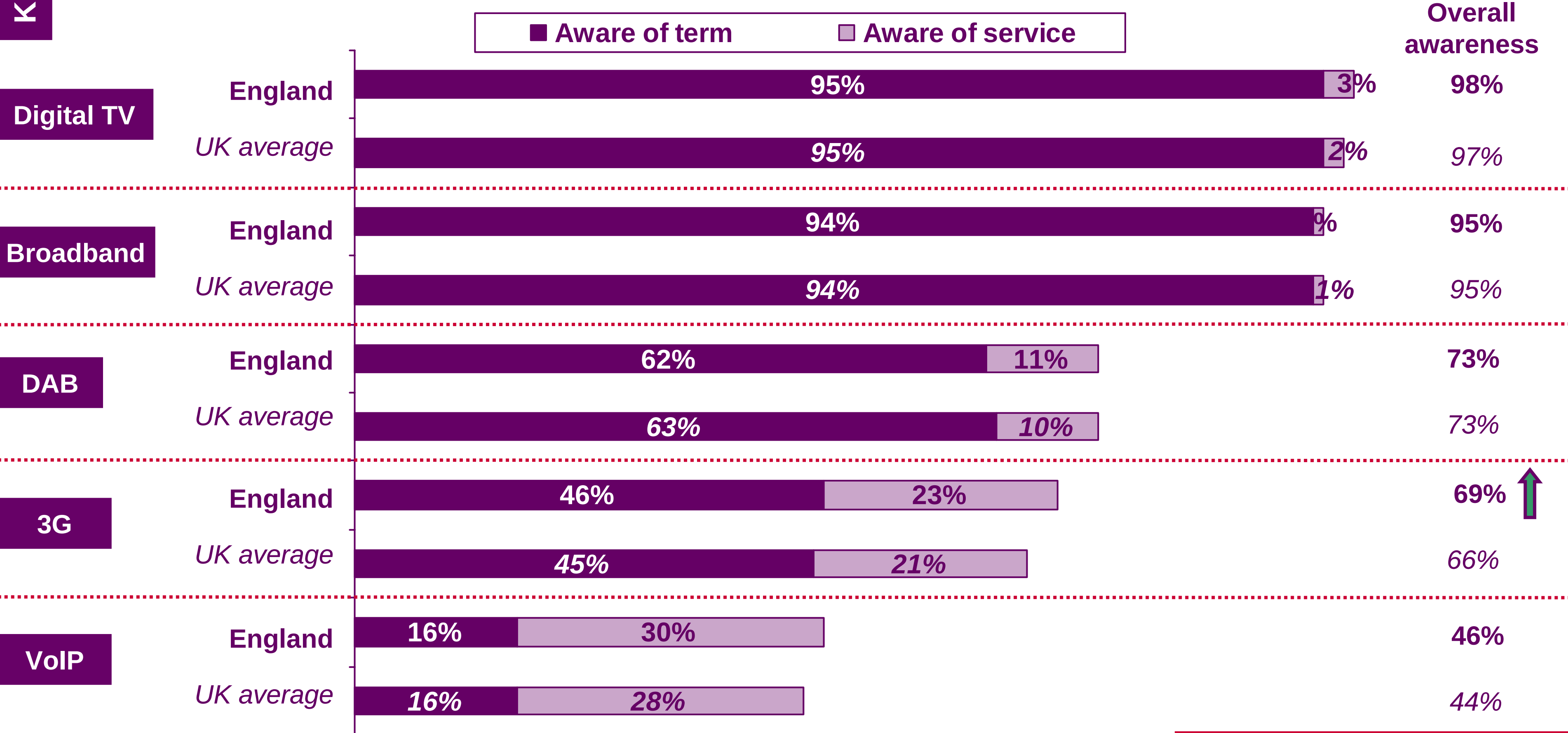
Knowledge

- A significant proportion of consumers in England are aware of the capability of DAB digital radio, 3G and VoIP once they are read a description of what these services provide
- The level of overall awareness for 3G for consumers in England is higher than for the UK as a whole



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Keeping informed about new developments - comparison to UK and change since 2004

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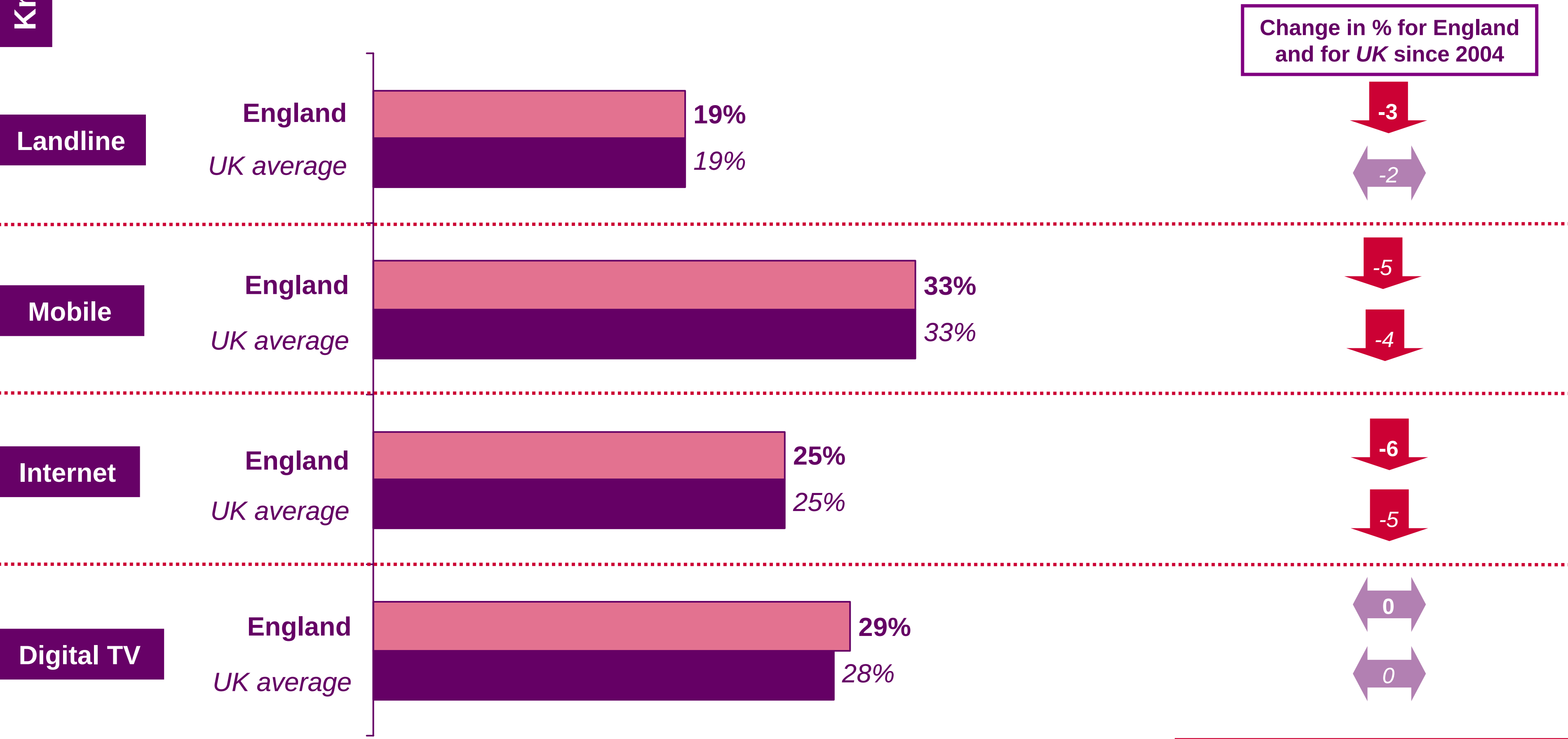
Knowledge

ENGLAND

- Consumers in England are most likely to keep themselves informed about developments for mobile phones and digital TV, followed by the internet, and least likely to keep themselves informed about developments for landline services
- Compared to 2004, fewer consumers in England keep themselves informed about mobile phones and the internet



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Base : All respondents England (1507) and UK overall (2,689)

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Keeping informed about new developments - comparison by age

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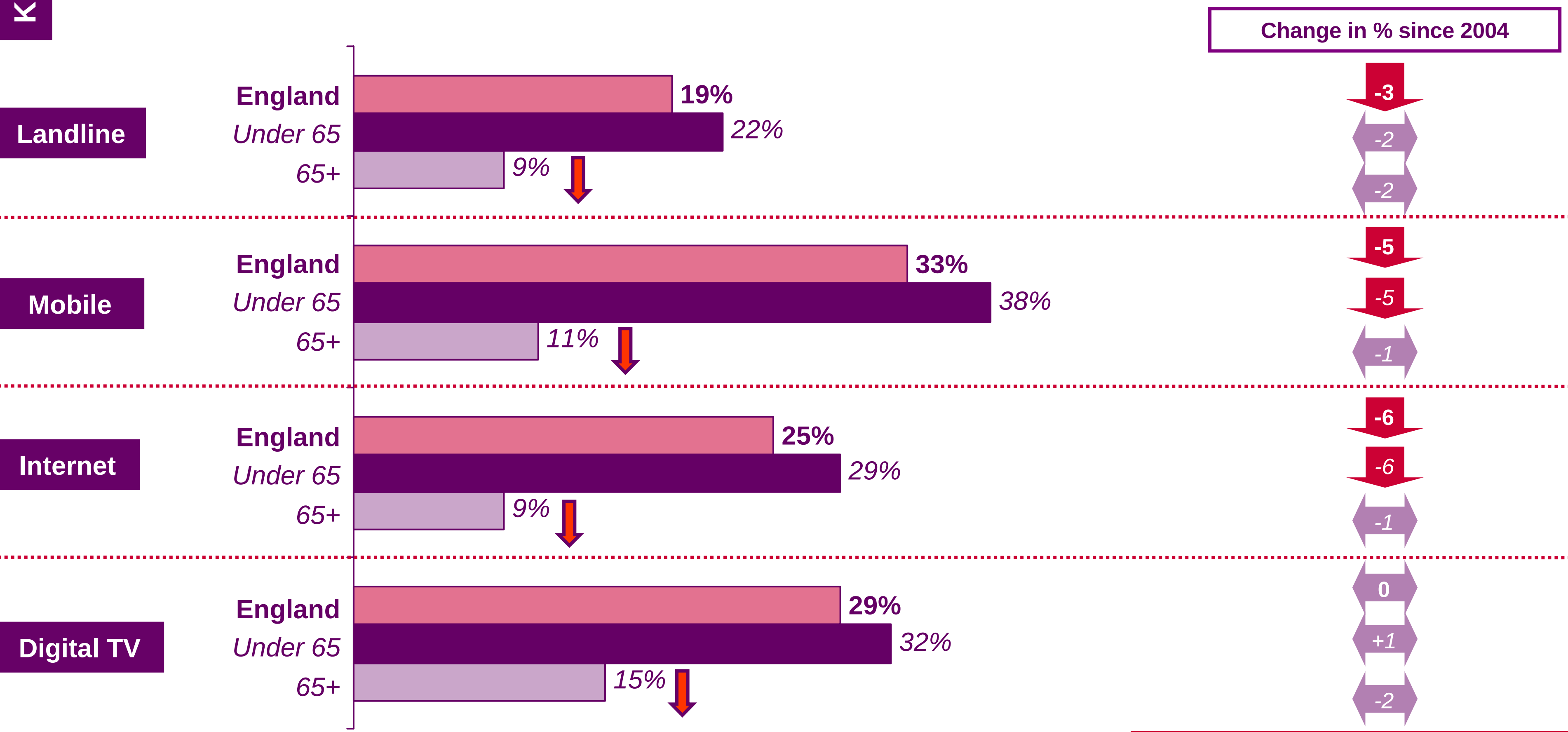
- Amongst consumers in England, younger consumers (aged under 65) are more likely to keep themselves informed about new developments for communication services
- Compared to 2004, consumers aged under 65 are significantly less likely to keep informed about mobiles phones and the internet



Indicates significantly lower or higher than **2005 England average**

Base : All respondents in England (1507), Under 65s (1263) and 65+ (244)

Sources of advice and information - comparison to UK and change since 2004

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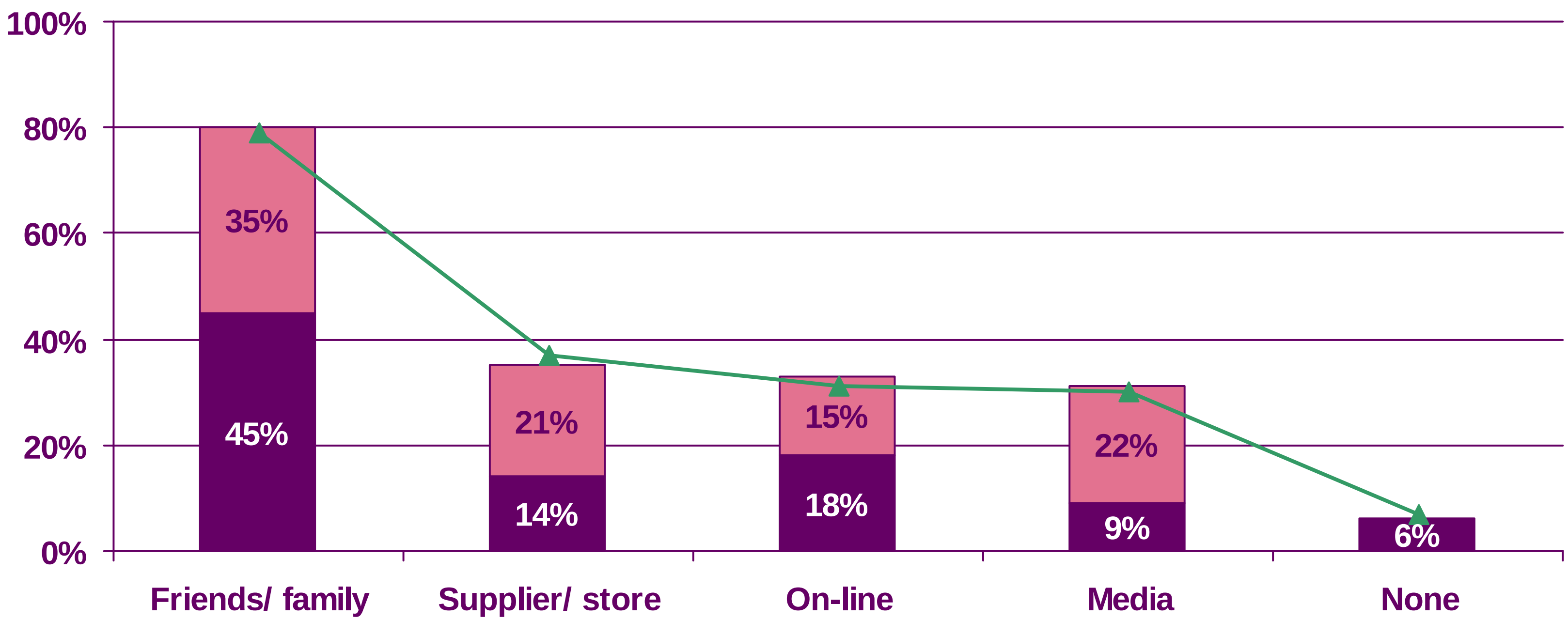
Knowledge

ENGLAND

- Friends and family are the most popular source of advice and information on communications sources for consumers in England followed by suppliers/ stores selling the services and online information sources
- Both friends and family and online sources see a significant increase in nomination for consumers in England compared to 2004, with suppliers/ stores and media sources less likely to be mentioned than in 2004

	Friends/ family	Supplier/ store	On-line	Media	None
Change in % since 2004 England	+13	-5	+9	+4	-1
Change in % since 2004 UK	*+10*	*-2*	*+9*	*-1*	*-1*



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Base : All respondents England (1507) and UK overall (2,689)

Sources of advice and information - comparison by age

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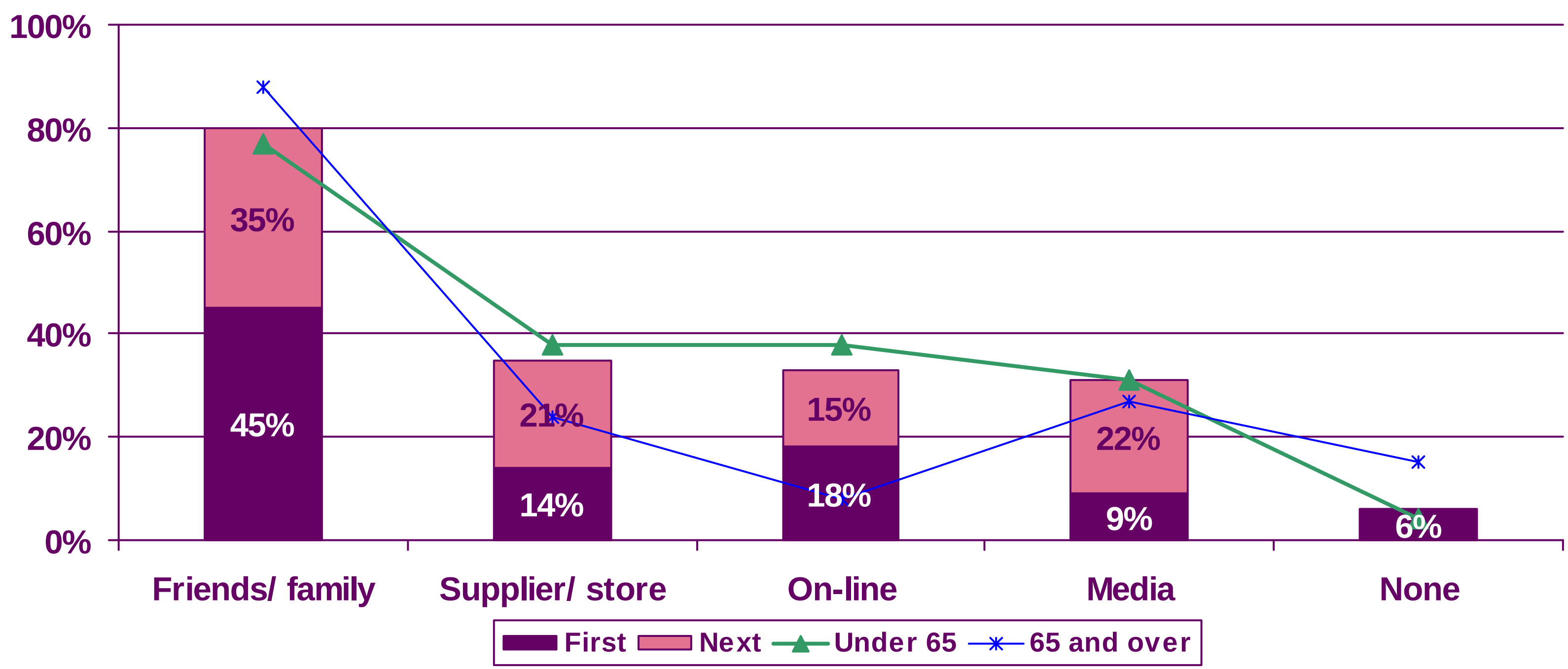
Knowledge

ENGLAND

- Consumers aged 65 and over in England are significantly more likely to nominate friends and family as a source of advice and information than people aged under 65
- While consumers aged 65 and over have shown an increase in nominations for friends and family, online and media information sources, they remain significantly less likely than younger consumers to nominate any sources of advice and information

Change in % since 2004 England	+13	-5	+9	+4	-1
Change in % since 2004 Under 65	+8	-6	+10	+1	0
Change in % since 2004 65 and over	+25	-1	+4	+12	-7

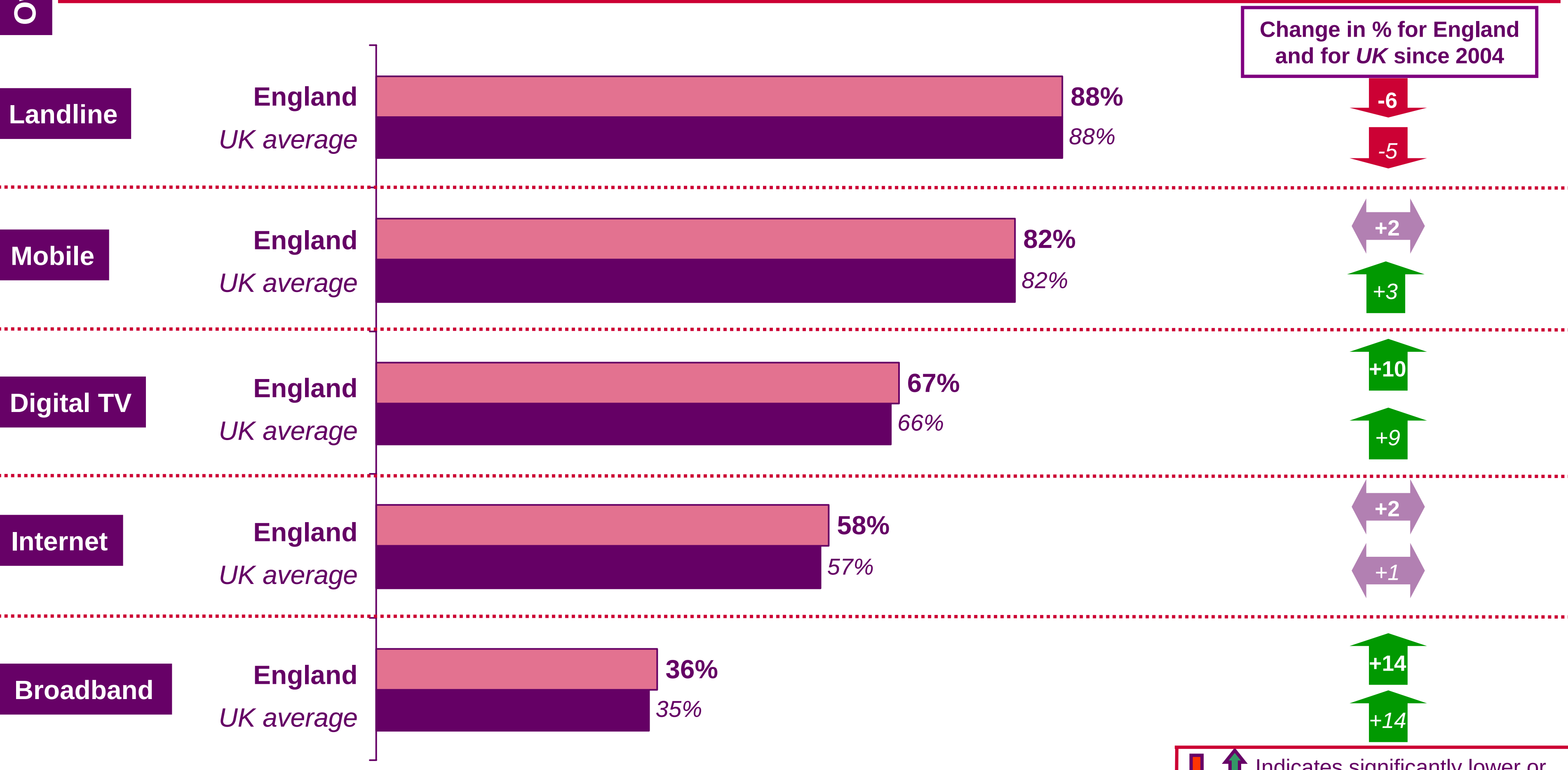


Base : All respondents in England (1507), Under 65s (1263) and 65+ (244)

Ownership of different platforms - comparison to UK and change since 2004

ENGLAND

- Consumers in England are the most likely to have internet access and along with Wales are the most likely to have digital TV at home
- Ownership of digital TV and broadband access to the internet has increased significantly since 2004 amongst consumers in England, with a decrease in landline ownership. These changes are comparable with the UK measures.

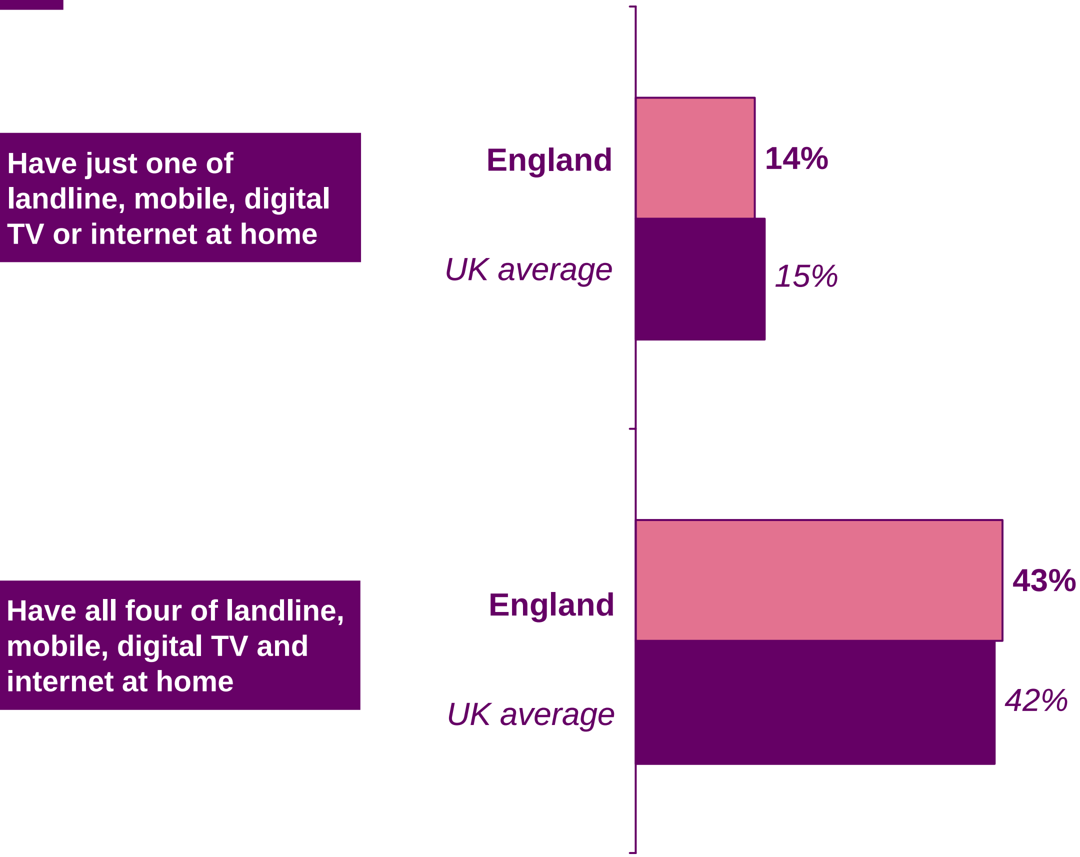


Base : All respondents England (1507) and UK overall (2,689)

Multiple platform ownership - comparison to UK

ENGLAND

- One in seven consumers in England own just one of the four communications technologies (landline, mobile phone, digital TV or the internet)
- Owning all four of these types communications technology accounts for two in five consumers in England – the highest for any UK nation



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Ownership

Voluntary and involuntary exclusion - comparison to UK

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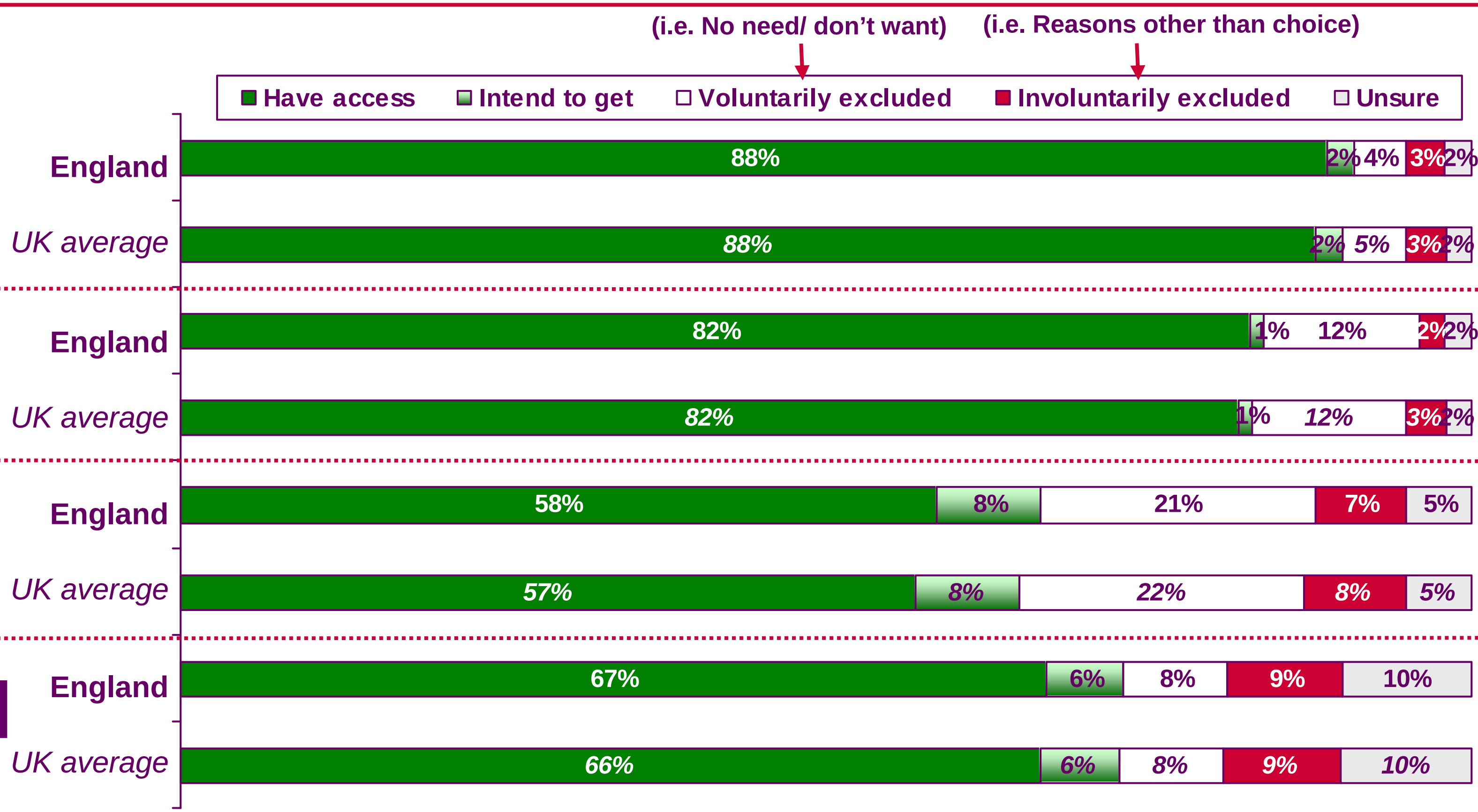
ENGLAND

- For each of the four communications technologies, involuntary exclusion is principally due to affordability (i.e. monthly charges, usage charges, cost of equipment)
- Consumers in England do not differ from the UK as a whole in terms of voluntary or involuntary exclusion, with the highest levels of voluntary exclusion relating to the internet and the highest levels of involuntary exclusion relating to digital TV



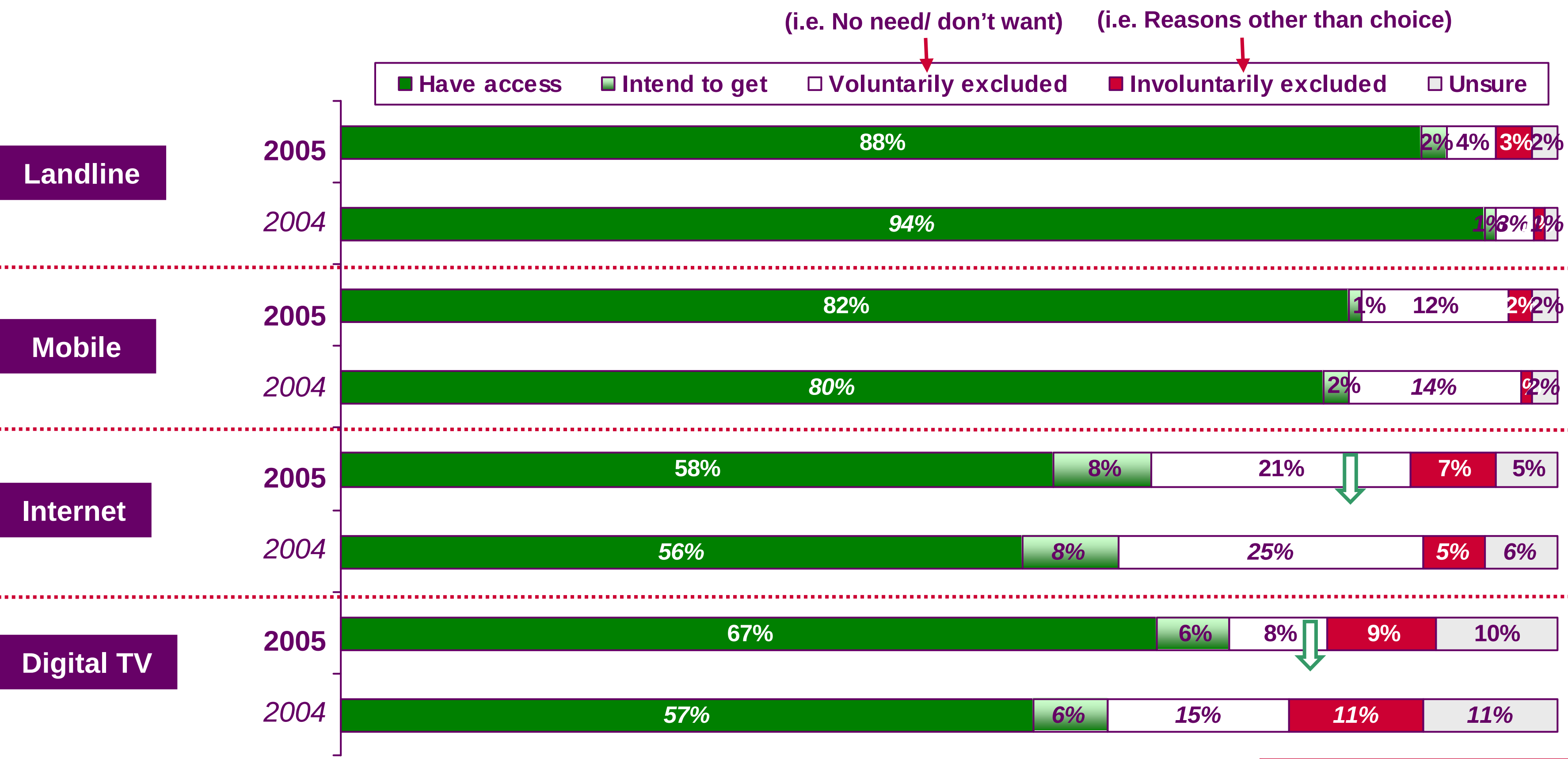
Indicates significantly lower or higher than **2005 UK average**

Base : All respondents England (1507) and UK overall (2,689)

Voluntary and involuntary exclusion - change since 2004

ENGLAND

- Compared to 2004 there has been a significant decrease in the proportion of consumers in England who are voluntarily excluded for the internet and for digital TV
- This is largely due to increase in ownership of both technologies



Base : All respondents in England 2005 (1507) and 2004 (1398)

Indicates significantly lower or higher than **2004 England**

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Mobile phone uses - comparison to UK

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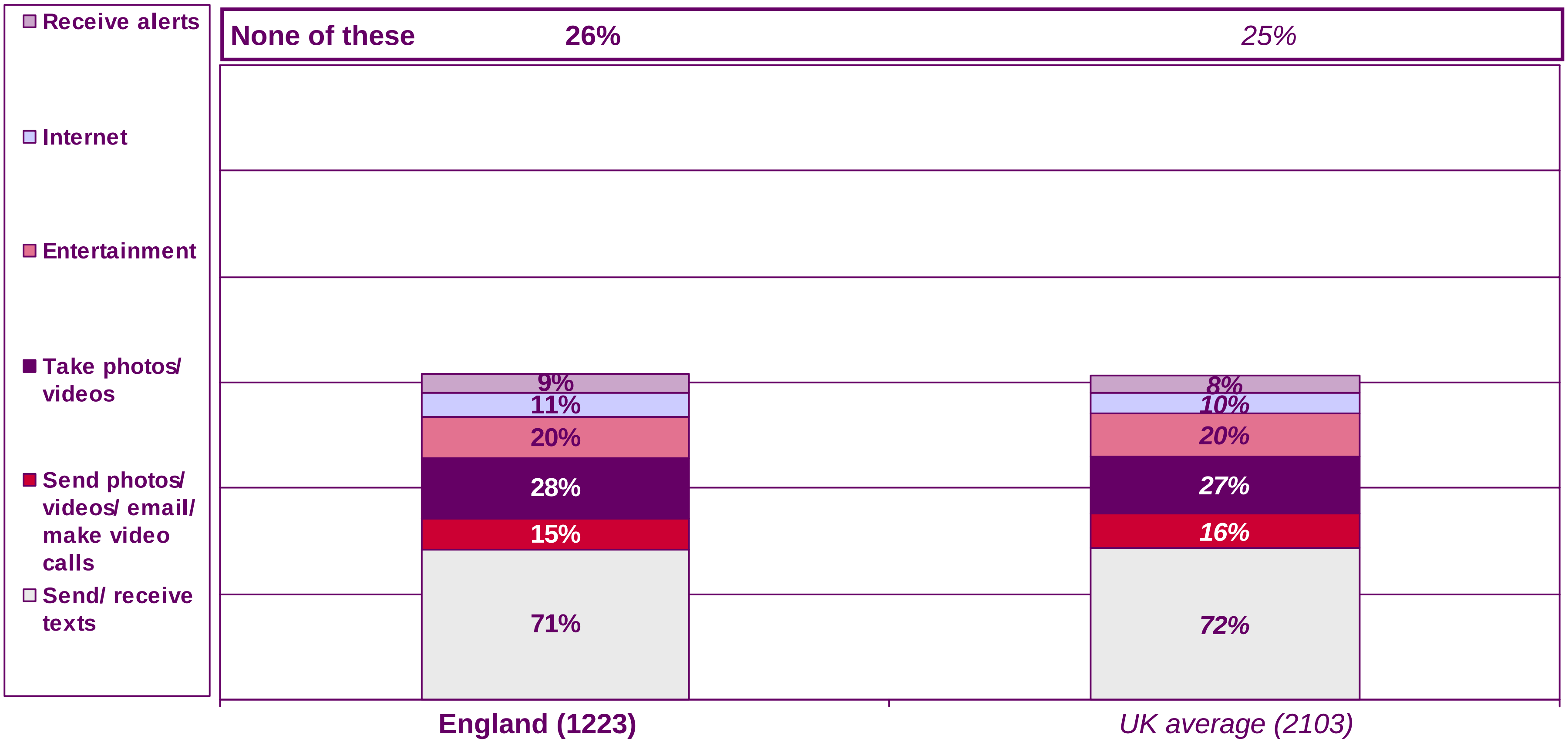
ENGLAND

- Amongst consumers in England, a minority of mobile phone owners use their phone on a weekly basis for any of the uses shown beyond sending and receiving text messages, with one in four not making any of these uses on a weekly basis



Indicates significantly lower or higher than **2005 UK average**

Base : All who use a mobile phone

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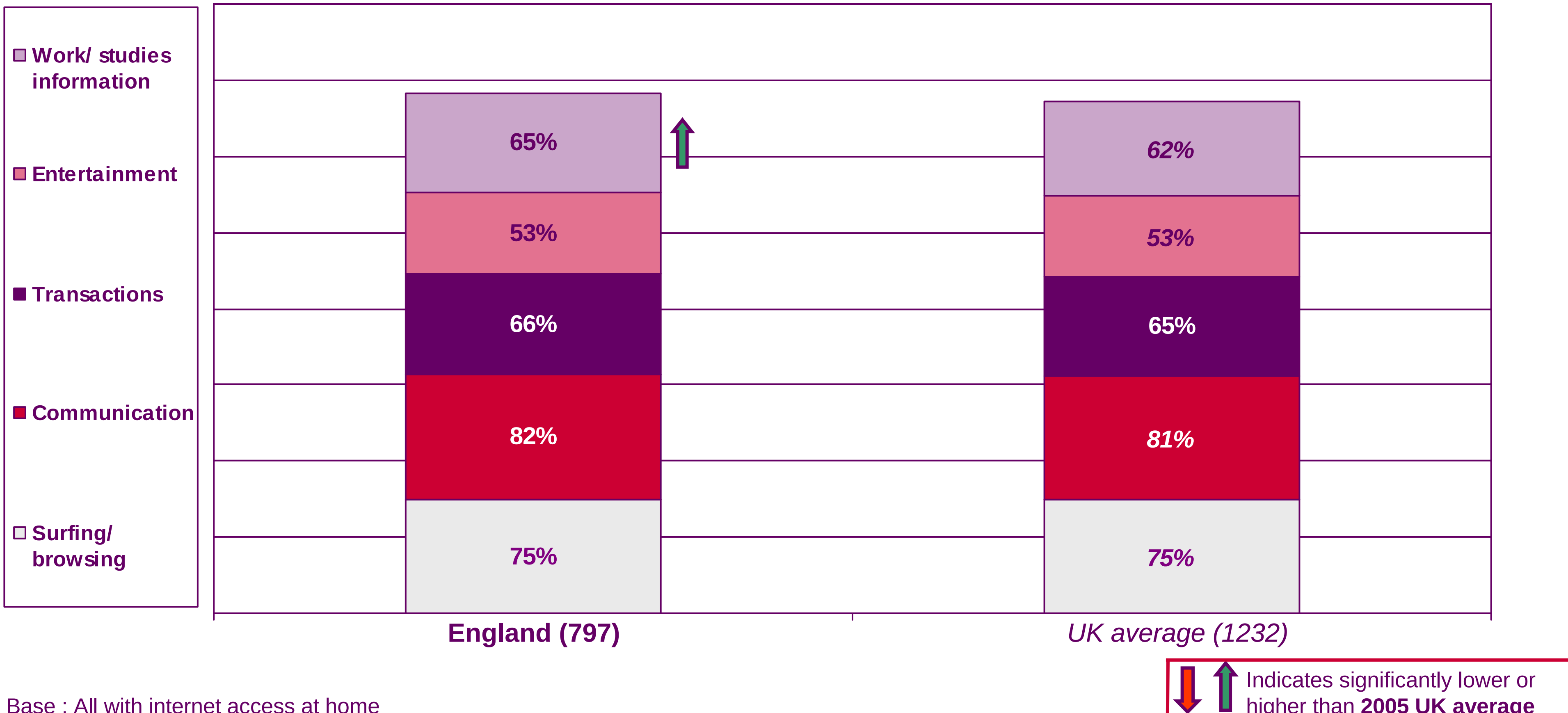
Internet uses - comparison to UK

Usage

ENGLAND

- Amongst consumers in England, those with internet access at home match the UK average in terms of the breadth of use of the internet
- Consumers in England are the most likely of each of the UK nations to use the internet for communication (e.g. emails, Instant Messaging), transactions (e.g. banking, shopping online), and for work/ studies information. As shown, those in England are significantly more likely to use the internet for work/ studies information compared to the UK average
- Those with broadband access to the internet make more uses of the internet compared to those with dial-up access



Base : All with internet access at home

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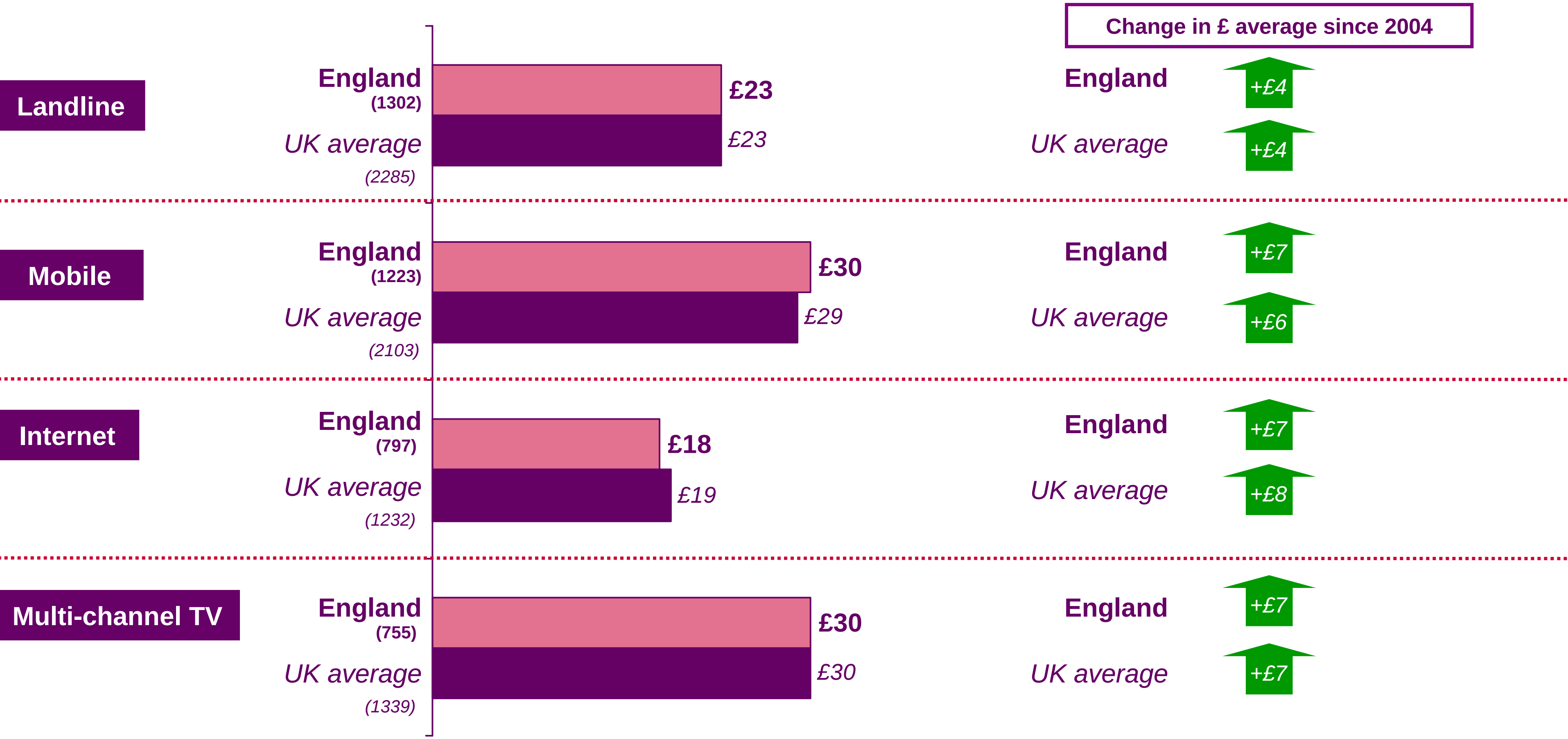
Average monthly spend – comparison to UK

Usage

ENGLAND

- Amongst owners in England the average self-reported monthly spend matches the UK average, with a similar spend for mobile phone and TV services
- Each of the services sees an increase in spend compared to 2004, with the increase in internet spend likely to have been affected by the increase in the use of broadband in England; with broadband users generally spending more than dial-up users.



Base : Owners of each type of device/ service

Concerns regarding services amongst owners

ENGLAND

Landline (1,302)

30% have any concerns or worries (30% for UK)
- 16% costs
- 8% privacy (unsolicited calls)

Higher level of reported concerns amongst older people aged 65+ and those in low income households

Increased from 24% with any concerns or worries in 2004

Mobile phone (1,223)

32% have any concerns or worries (31% for UK)
- 21% costs
- 4% choice/ access/ coverage
- 4% unsolicited calls/ texts

Higher level of reported concerns amongst younger owners

Increased from 28% with any concerns or worries in 2004

Internet (1232)

40% have any concerns or worries (41% for UK)
- 29% spam/ pop-ups/ viruses/ control
- 14% security

Higher level of reported concerns amongst younger users and those with broadband access

Increased from 32% with any concerns or worries in 2004

Digital TV (1484)

24% have any concerns or worries (24% for UK)
-14% costs
- 4% choice/ access
- 3% customer service

Little variation in level of reported concerns

Increased from 17% with any concerns or worries in 2004

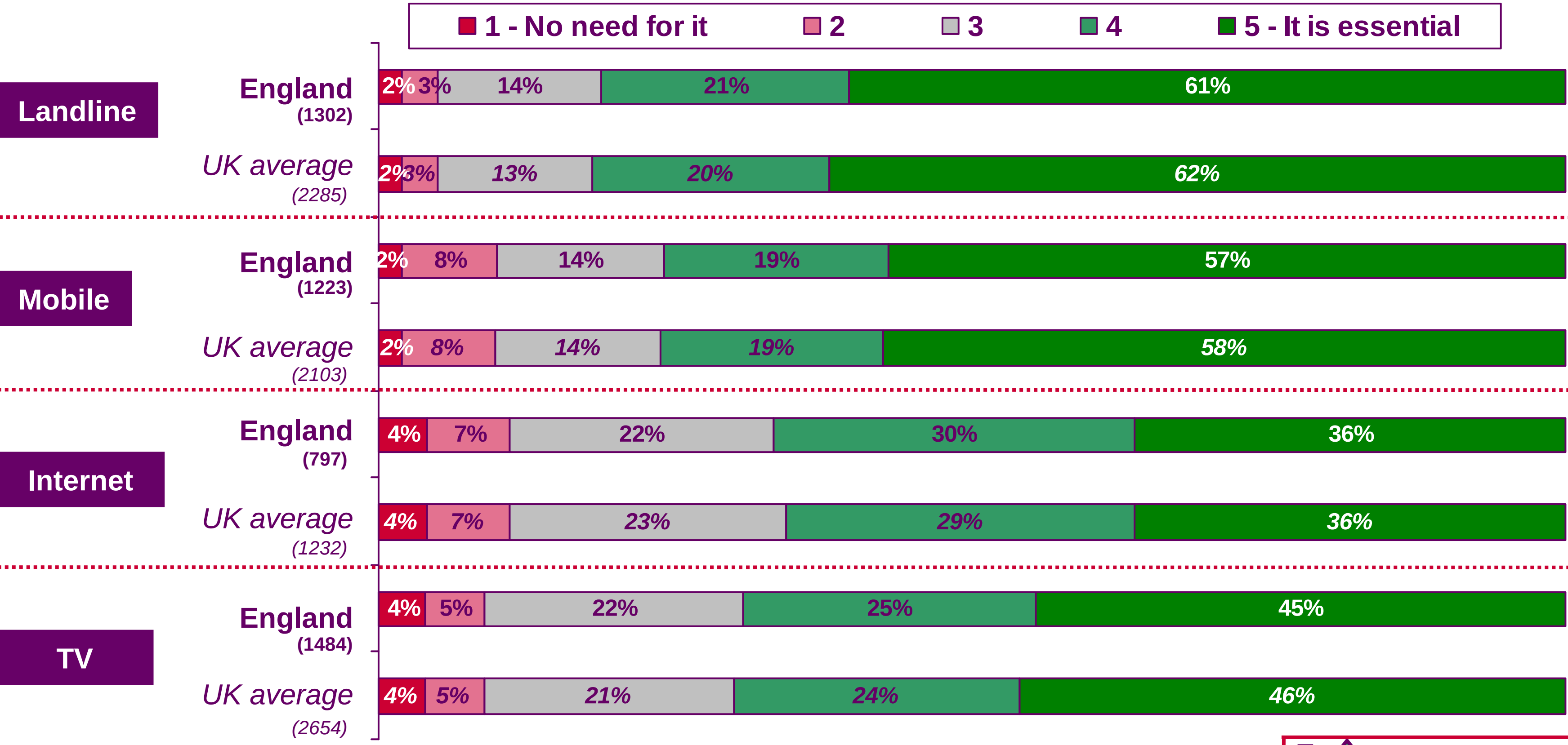
Base : Owners of each type of device/ service

Importance of devices/ services owned - comparison to UK

ENGLAND

Attitudes

- Amongst owners of each type of device/ service in England, landline and mobile phones are the most likely to be considered essential, with a minority of internet owners rating this service as being essential
- Landline services are more likely to be rated as essential by older adults and those with any disability, mobile phone services by younger adults and those in low income households, internet services by younger adults and males, and TV services by older adults, those in low income households and those with any disability



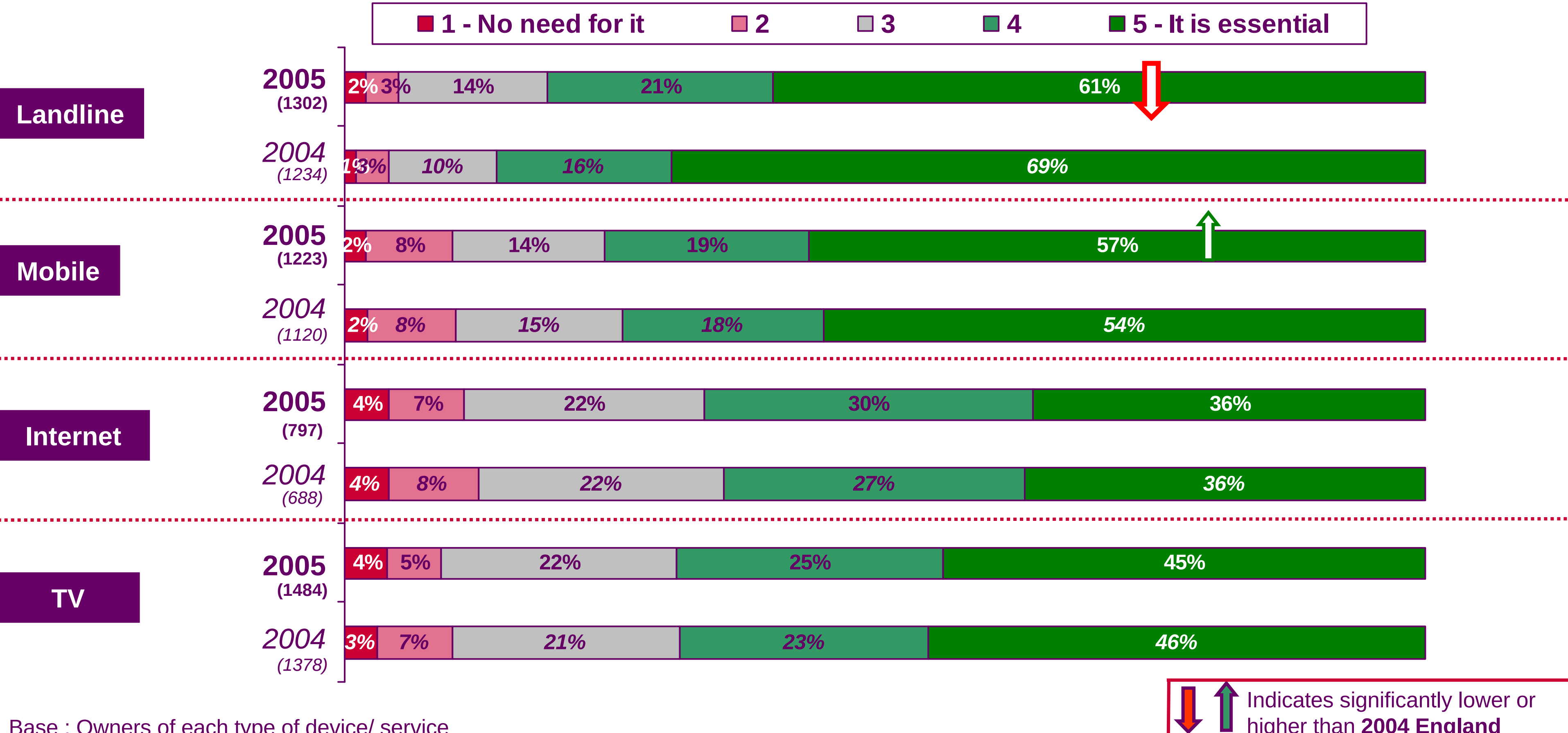
Indicates significantly lower or higher than **2005 UK average**

Base : Owners of each type of device/ service

Importance of devices/ services owned - change since 2004

ENGLAND

- Compared to 2004, owners in England are less likely to consider their landline service to be essential, and more likely to consider their mobile phone service to be essential; matching the findings for the UK as a whole
- The perceived importance of internet and TV services remains unchanged since 2004



Base : Owners of each type of device/ service

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Attitude towards value from services - comparison to UK and change since 2004

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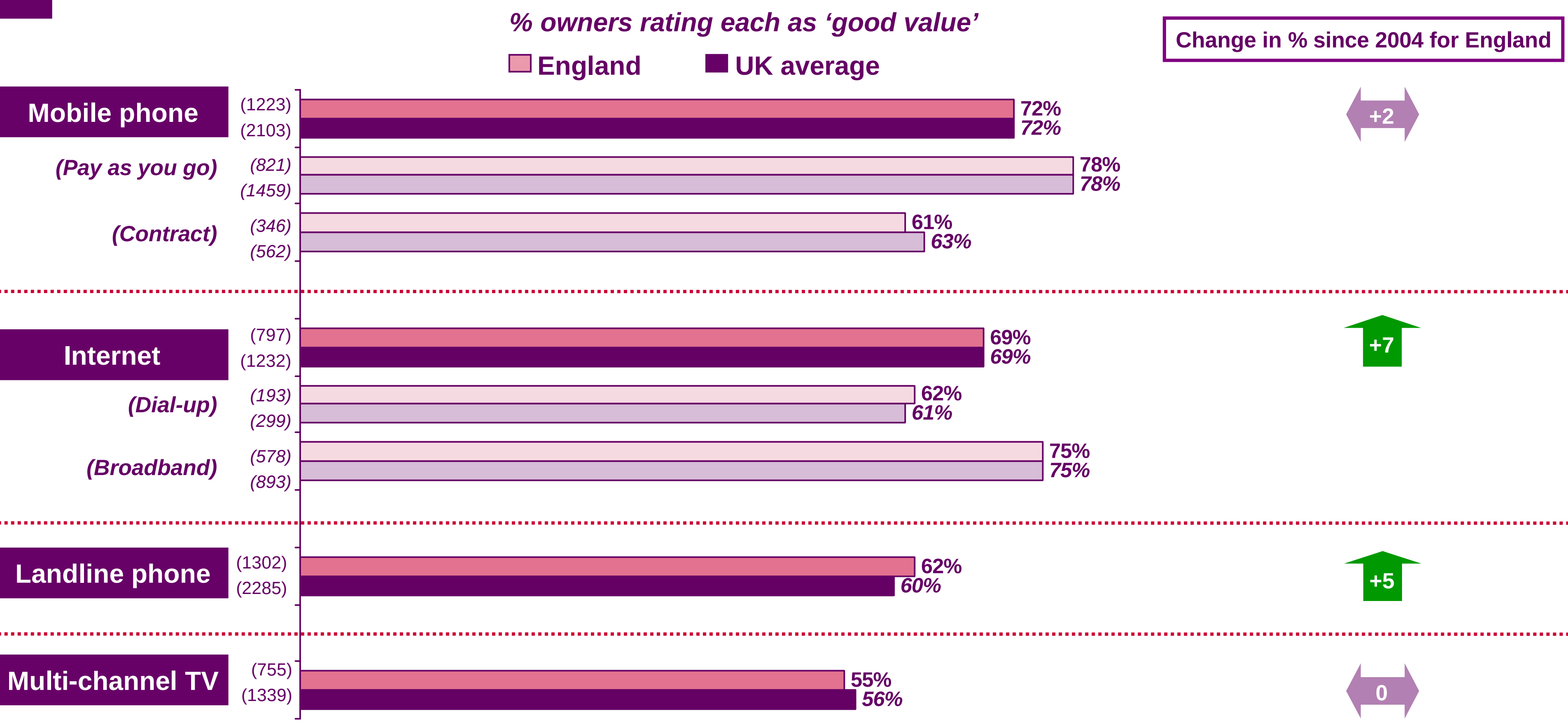
Attitudes

ENGLAND

- The mobile phone service and internet services are most likely to be rated as providing good value by owners of each type of device/ service in England; in particular amongst those using pay as you go for their phone and those using broadband access for the internet
- Perceived value ratings for internet and landline services see a significant increase since 2004



Indicates significantly lower or higher than **2005 UK average**

Base : Owners of each type of device/ service

Satisfaction with communications services and suppliers - comparison to UK

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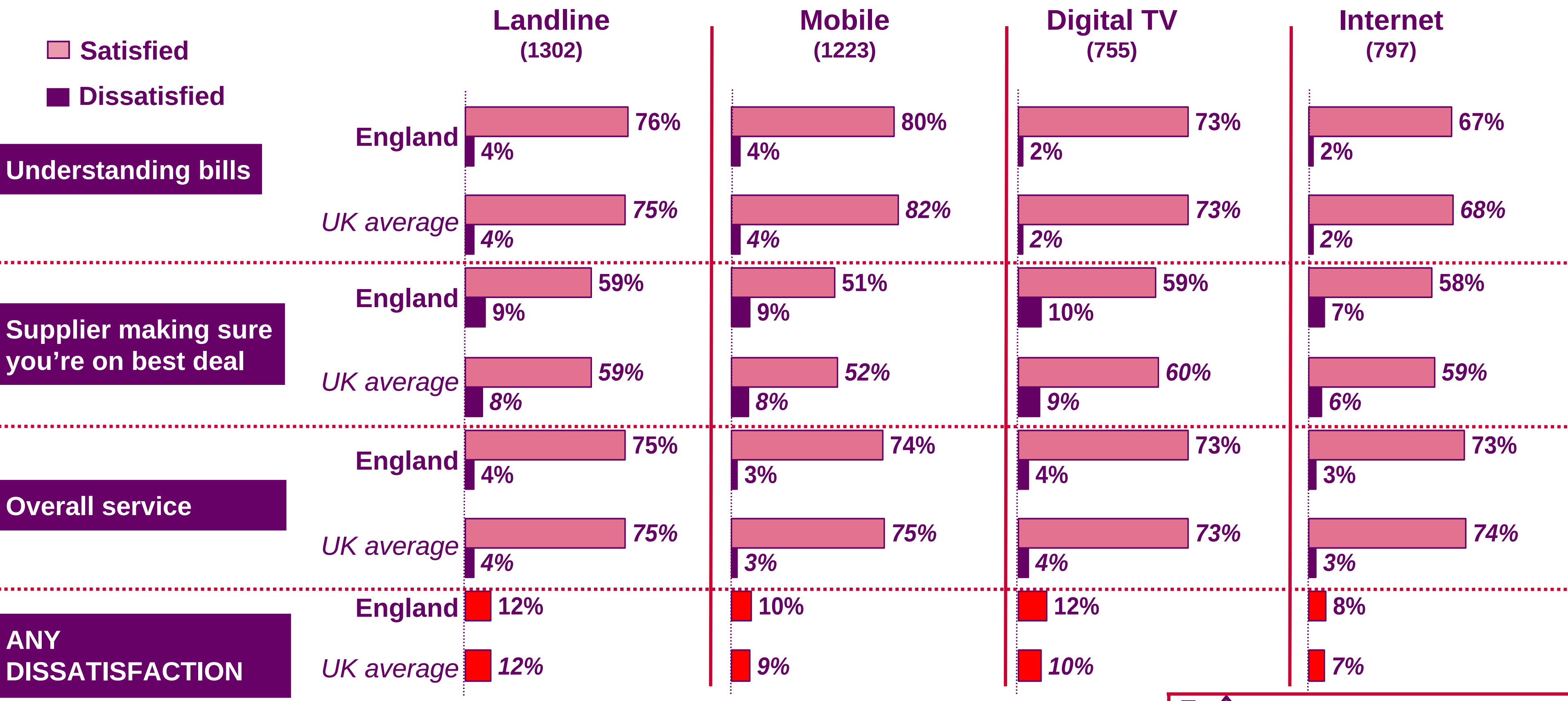
Attitudes

ENGLAND

- Three quarters of owners of each type of service/ device in England are satisfied with the overall service provided, with around one in ten dissatisfied at all, and lowest levels of overall dissatisfaction for internet services
- Lowest satisfaction regarding ‘Your supplier making sure you are on the best of their deals for you’, and more so for mobile phone service



Indicates significantly lower or higher than **2005 UK average**

Base : Owners of each type of device/ service

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Satisfaction with communications services and suppliers - change since 2004

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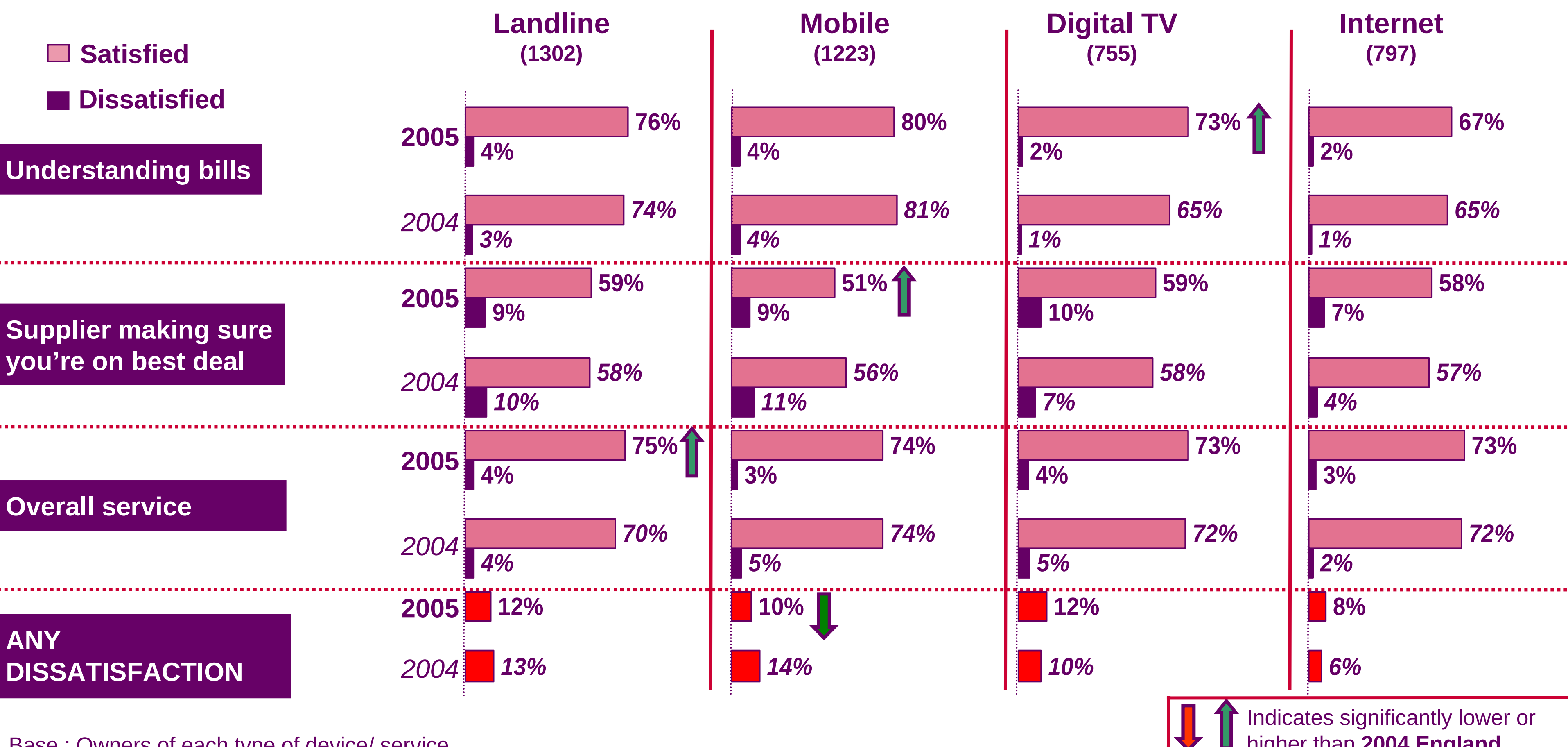
Attitudes

ENGLAND

- Amongst consumers in England, few services see an increase in satisfaction
- Mobile phone services, however, see an overall decrease in any dissatisfaction.
- Whilst '…making sure you are on the best of their deals for you' remains the lowest rated aspect, satisfaction has improved for mobile phone services



Base : Owners of each type of device/ service

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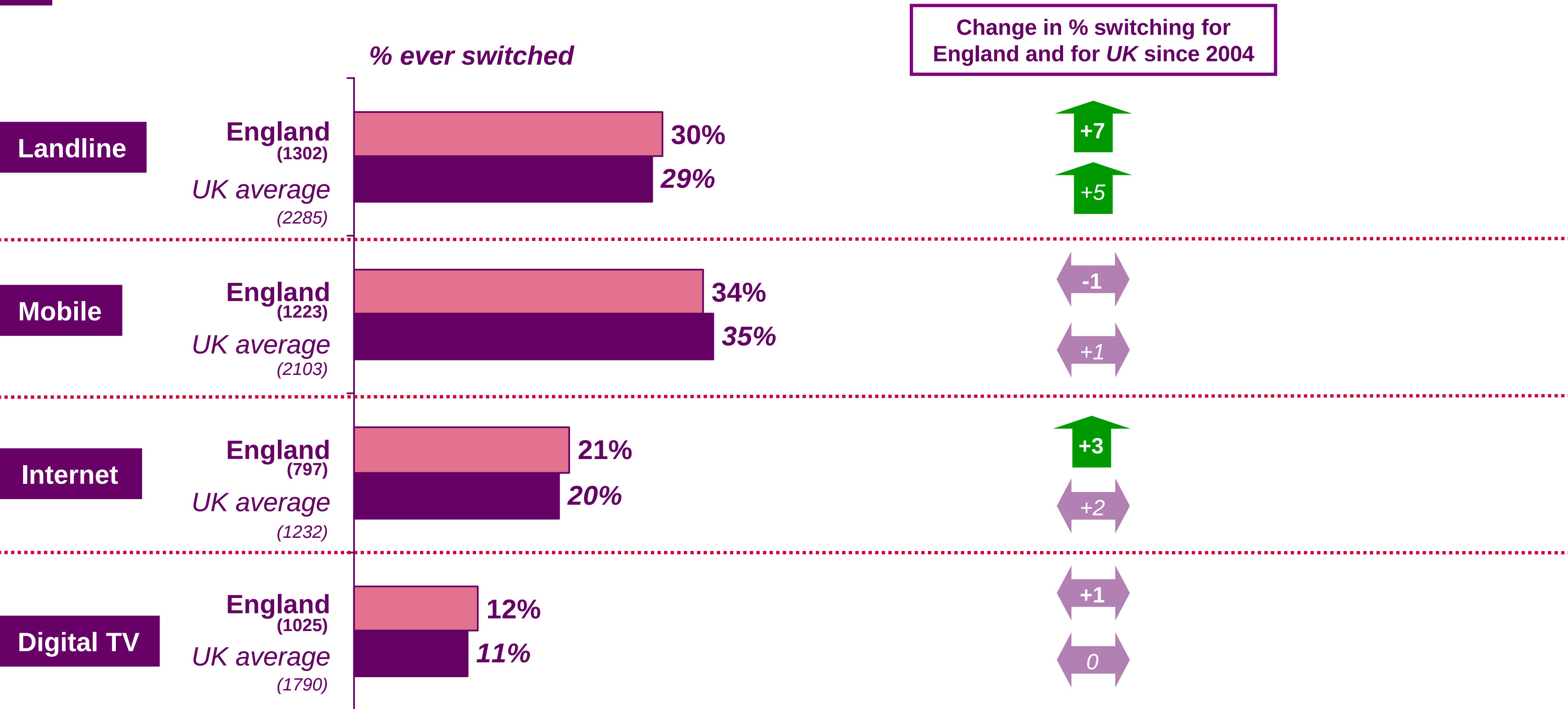
Switching suppliers - comparison to UK and change since 2004

- Consumers in England are most likely to have ever switched suppliers for their mobile phone and landline phone services, as for the UK overall, and the incidence of having ever changed the company used for landline and internet services has increased since 2004
- Across all markets the types of customers more likely to have ever switched supplier tend to be younger, more affluent and more likely to keep informed

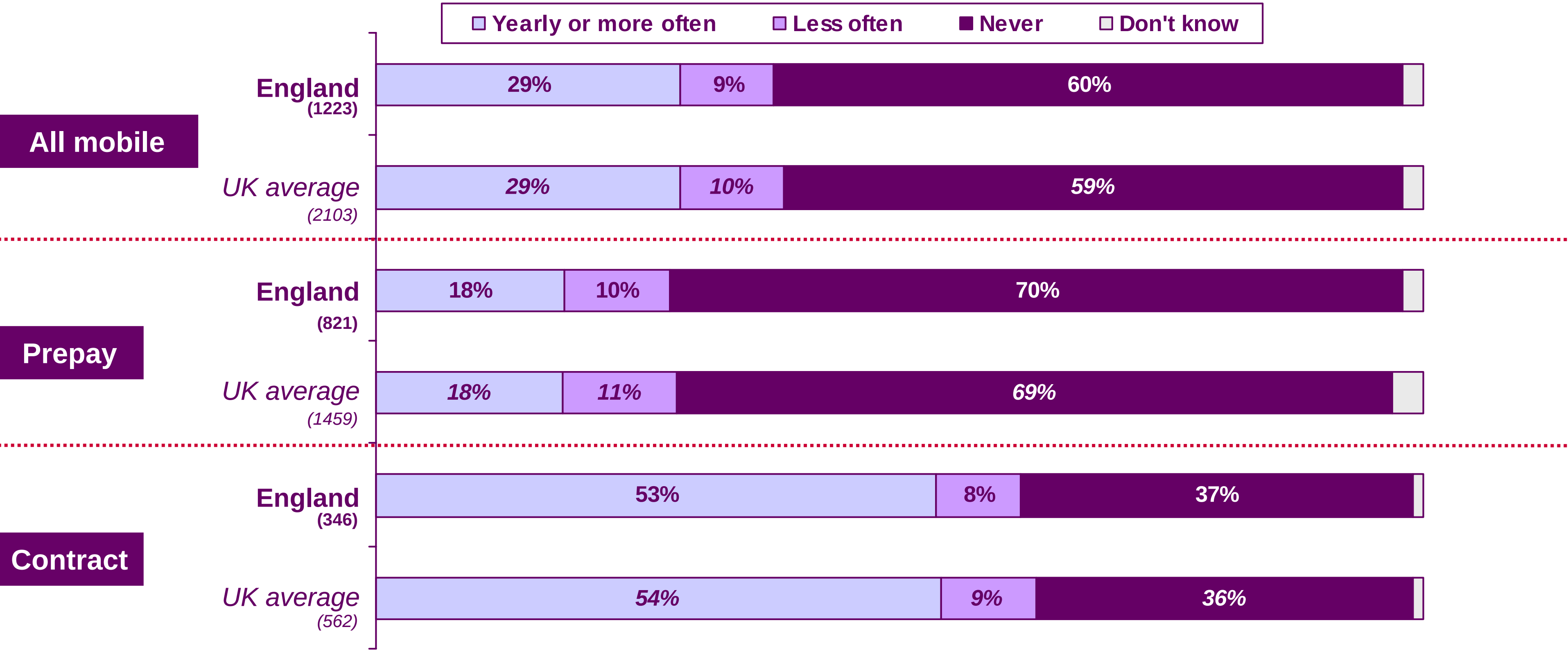


Indicates significantly lower or higher than **2005 UK average**

Base : Owners of each type of device/ service

Mobile tariff checking to ensure best deal - comparison to UK

- Almost four in ten consumers in England with a mobile phone ever check whether they are on the best tariff or deal, comparable to the UK figures
- Those with a contract for their mobile phone are significantly more likely to ever check compared to pay as you go users, with three in five ever checking the tariff they have



Indicates significantly lower or higher than **2005 UK average**

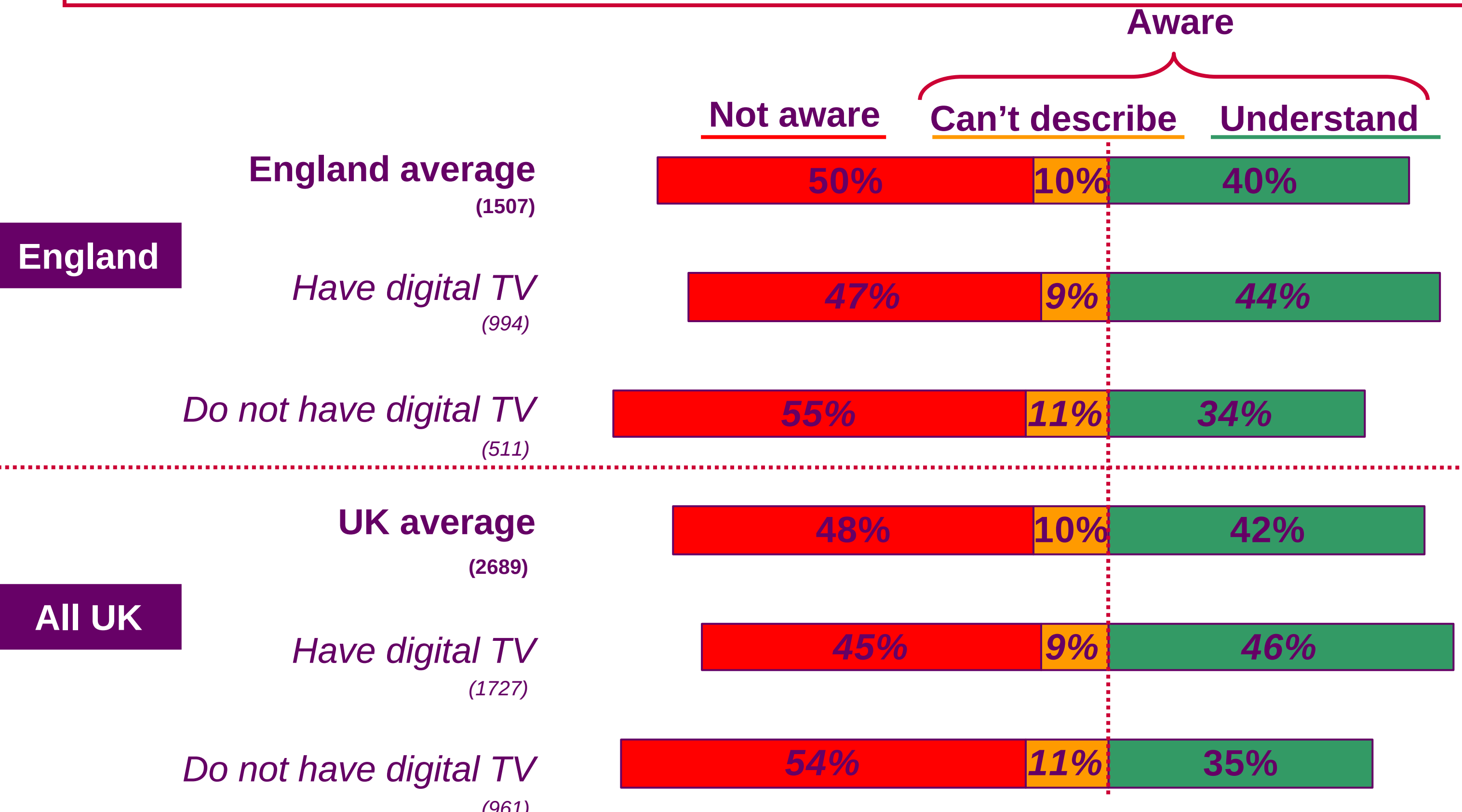
Base: All who use a mobile phone

Awareness and understanding of Digital switchover - comparison to UK

ENGLAND

DSO

- Two in five of all consumers in England have heard the term digital switchover and are able to describe what the tern refers to (‘Understand’), with each of the other UK nations exceeding the level of understanding of digital switchover in England – perhaps because switchover is scheduled to start sooner in the other nations
- In England, as in the UK overall, those with digital TV are significantly more likely to be aware of digital switchover



Base : All respondents

Indicates significantly lower or higher than **2005 UK average**

Awareness and understanding of Digital switchover - change since 2004

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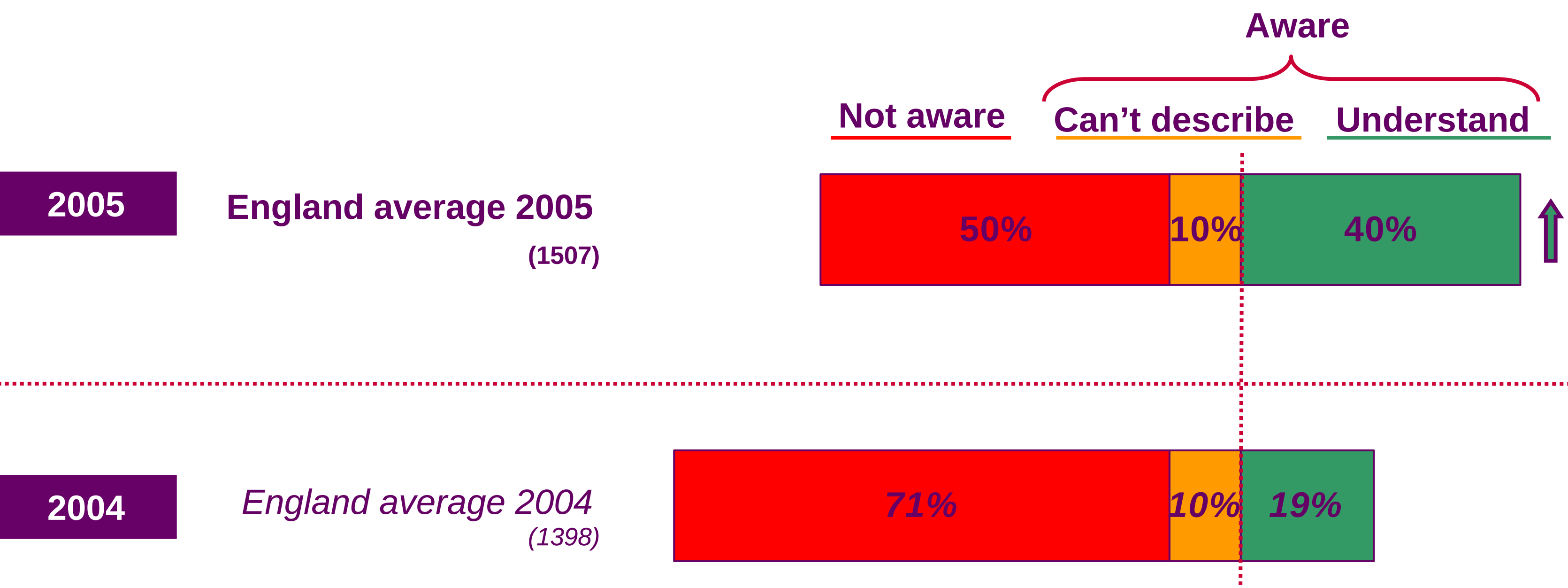
DSO

ENGLAND

- Understanding of the term digital switchover has increased significantly amongst consumers in England compared to 2004; rising by 21% to account for 40% of all consumers in England. Increases since 2004 are greater in each of the other UK nations.
- Understanding is lower amongst consumers in England in low income households, those in dense urban areas and those who are not working



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Base: All respondents