Ofcom Consumer Panel Research
Quantitative Research Findings

Focus on Northern Ireland

June 2006

Report outline

- This report compares the findings for residential consumers in Northern Ireland with those residential consumers in the **UK overall**
  - measures for the 2004 survey are also shown for comparison
- Differences shown of ±6% (where based on all respondents) are statistically significant
- Where findings for Northern Ireland 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 Northern Ireland ⇩ ⇧
- 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 Northern Ireland – comparison to UK and change since 2004

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Knowledge

- Lower understanding of broadband but higher for 3G and VoIP compared to the UK average, with significant increase since 2004 in understanding of digital TV and 3G – through being able to describe what the terms mean
- Overall awareness (aware of term or aware of service capability) of each of the communications services is lower than UK average
- More likely than UK average to keep informed of developments regarding mobile phones
- Friends and family and suppliers/ stores are the most popular source of advice, more likely to refer to suppliers/ stores and less likely to refer to friends and family than UK average
- Awareness of digital switchover at the same level as the UK average, and a significant increase in awareness since 2004

Ownership

- Less likely than UK average to have mobile phone, digital TV, internet access generally and broadband internet access in particular, and more likely to be involuntarily excluded for the internet and digital TV
- Increase since 2004 in ownership of broadband internet access at home, despite no increase in overall internet ownership levels

Usage

- More uses made of mobile phones compared to UK average, and similar use made of the internet

Attitudes

- Higher levels of concerns or worries regarding services amongst owners compared to the UK average, and levels have increased since 2004
- More likely than UK average to rate landline and mobile phone services as essential, with an increase in the importance of landline, mobile phone and internet services since 2004
- Fewer users rate their mobile phone, landline phone and TV services as providing good value compared to UK levels
- Lower levels of satisfaction for all services compared to the UK average through more neutral attitudes towards the service received. The mobile phone service sees increases in satisfaction with all aspects of service, however
- Less likely than the UK average to have ever switched landline phone suppliers, with the incidence of having ever changed the company used falling significantly since 2004

Awareness and understanding of communication terms - comparison to UK

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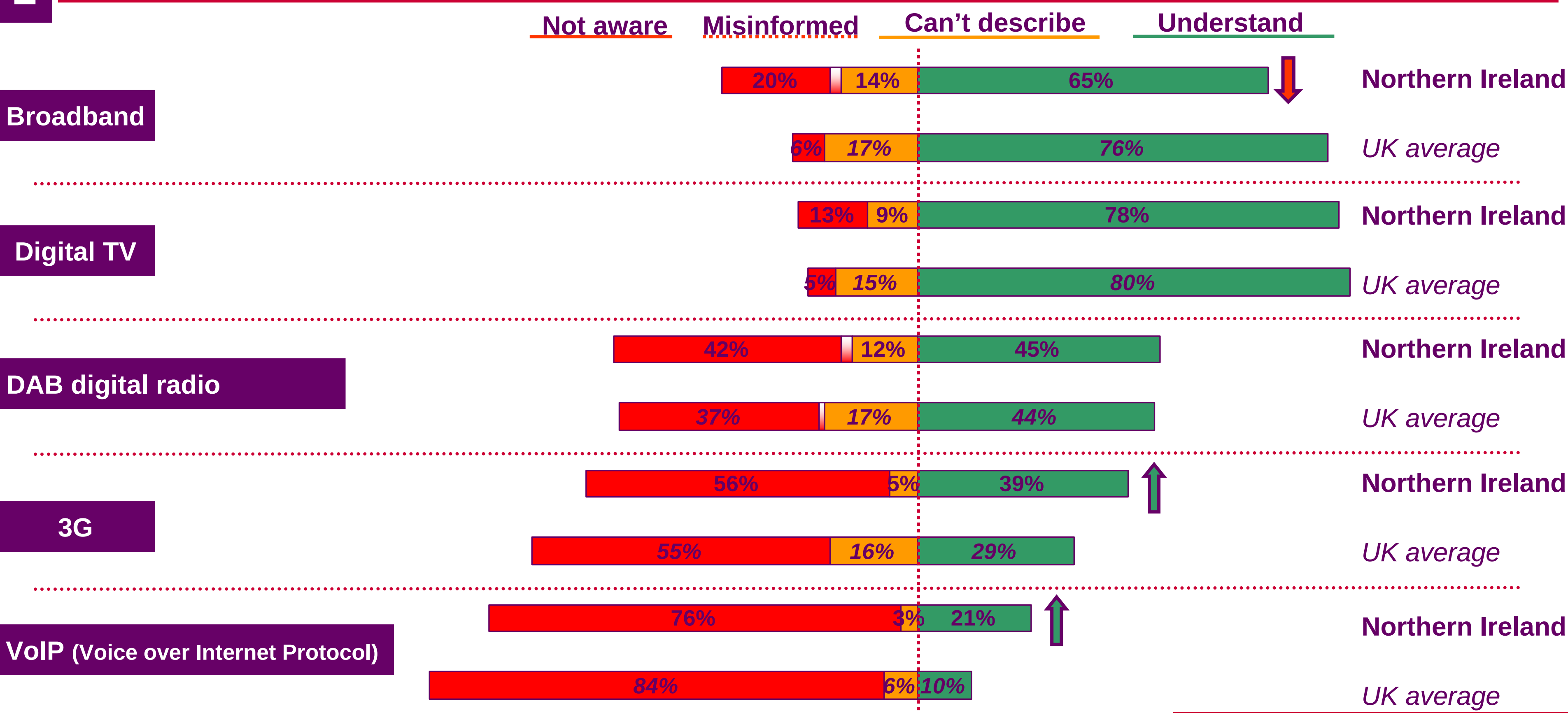
Knowledge

- High overall awareness for broadband and digital TV, moderate for DAB digital radio and 3G, and low for VoIP
- Amongst consumers in Northern Ireland, 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)
- Whilst understanding of broadband is below the UK average, understanding of 3G and VoIP is higher



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

Base : All respondents in Northern Ireland (356) and UK overall (2,689)

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Awareness and understanding of communication terms – change since 2004

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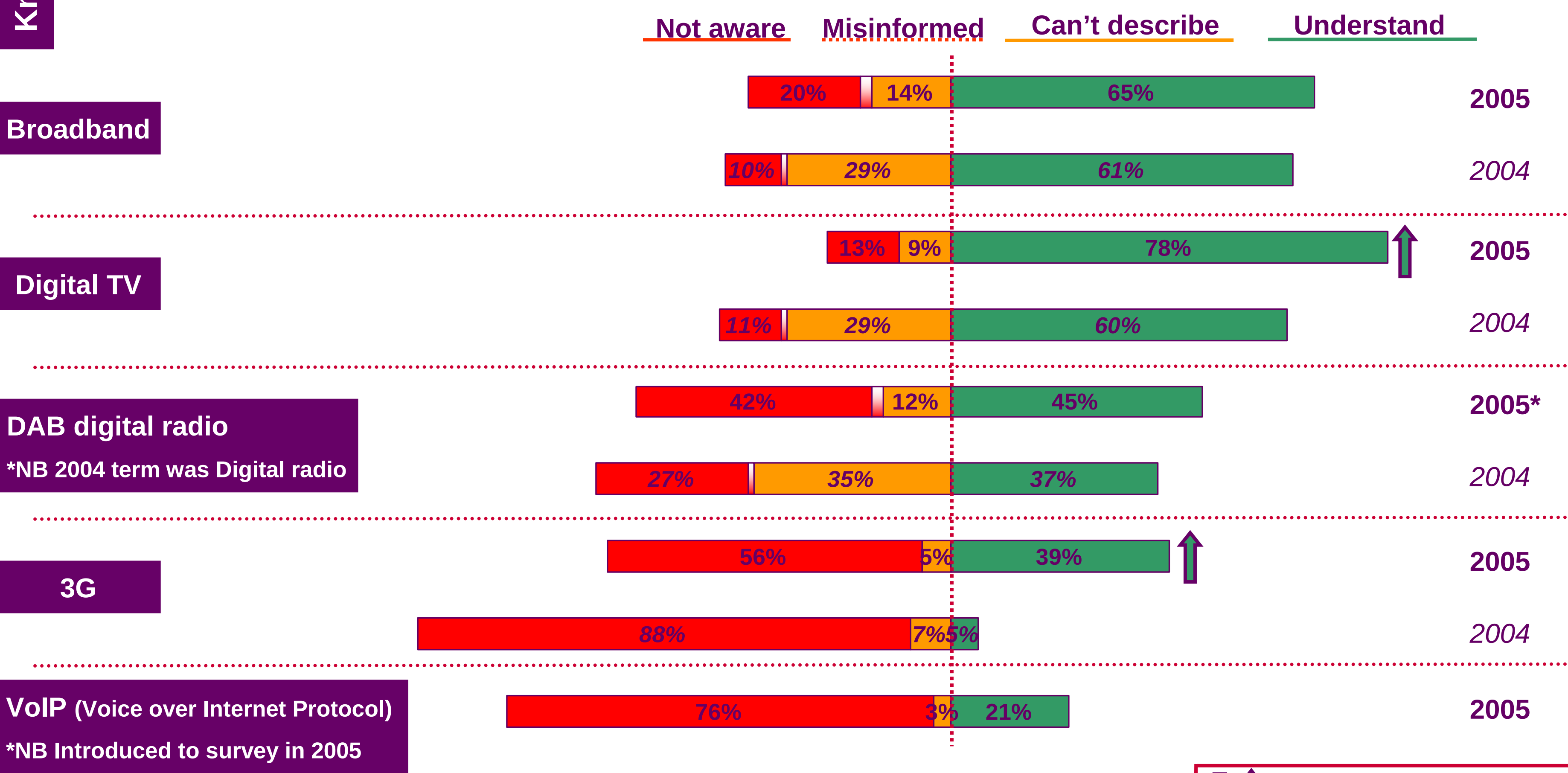
Knowledge

- Significant increases amongst consumers in Northern Ireland in awareness of the communications terms digital TV and 3G
- The greatest increases since 2004 are amongst those consumers in low income households



Base : All respondents in Northern Ireland 2005 (356) and 2004 (343)

Indicates significantly lower or higher than **2004 Northern Ireland**

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Overall awareness of communications services - comparison to UK

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Knowledge

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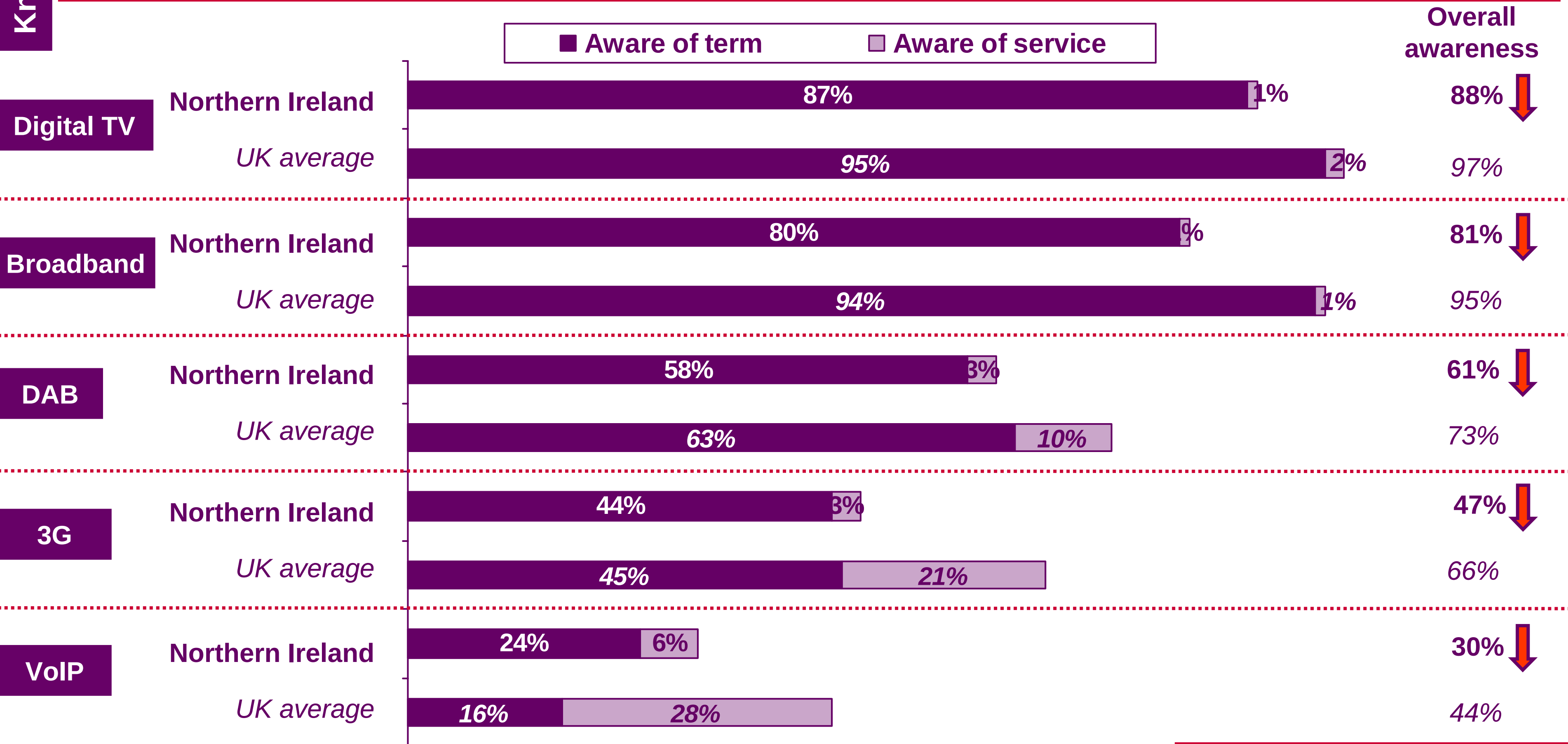
- Whilst a significant proportion of consumers in the UK overall are aware of the capability of DAB digital radio, 3G and VoIP once they are read a description of what these services provide, this is not the case for consumers in Northern Ireland
- The levels of overall awareness for each of the five services are lower than for the UK as a whole



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Base : All respondents in Northern Ireland (356) and UK overall (2,689)

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

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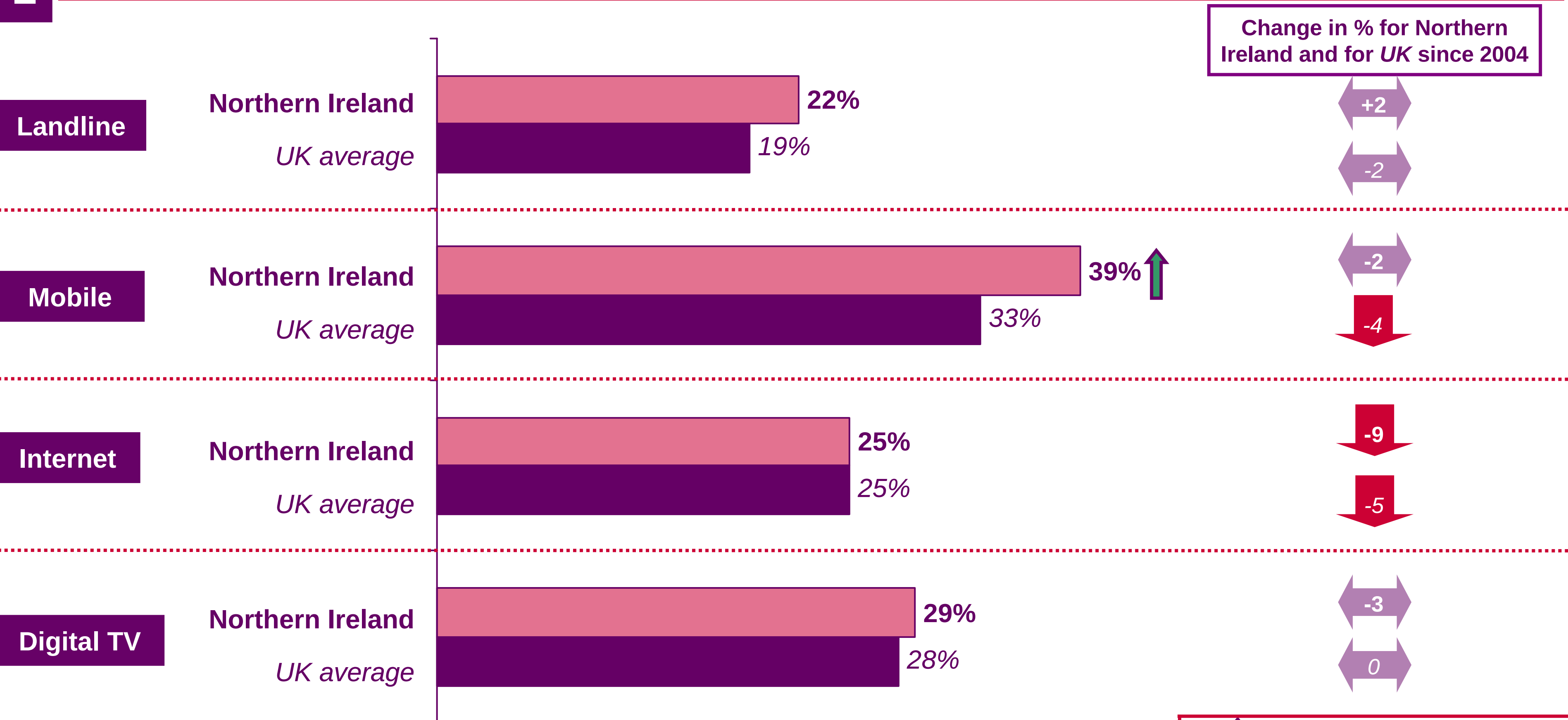
Knowledge

- Consumers in Northern Ireland do not differ from the UK overall in keeping themselves informed about developments for communications services, with the exception of mobile phone developments
- Compared to 2004, significantly fewer consumers in Northern Ireland keep themselves informed about the internet, but levels are otherwise much the same as in 2004



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

Base : All respondents in Northern Ireland (356) and UK overall (2,689)

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Keeping informed about new developments - comparison by age

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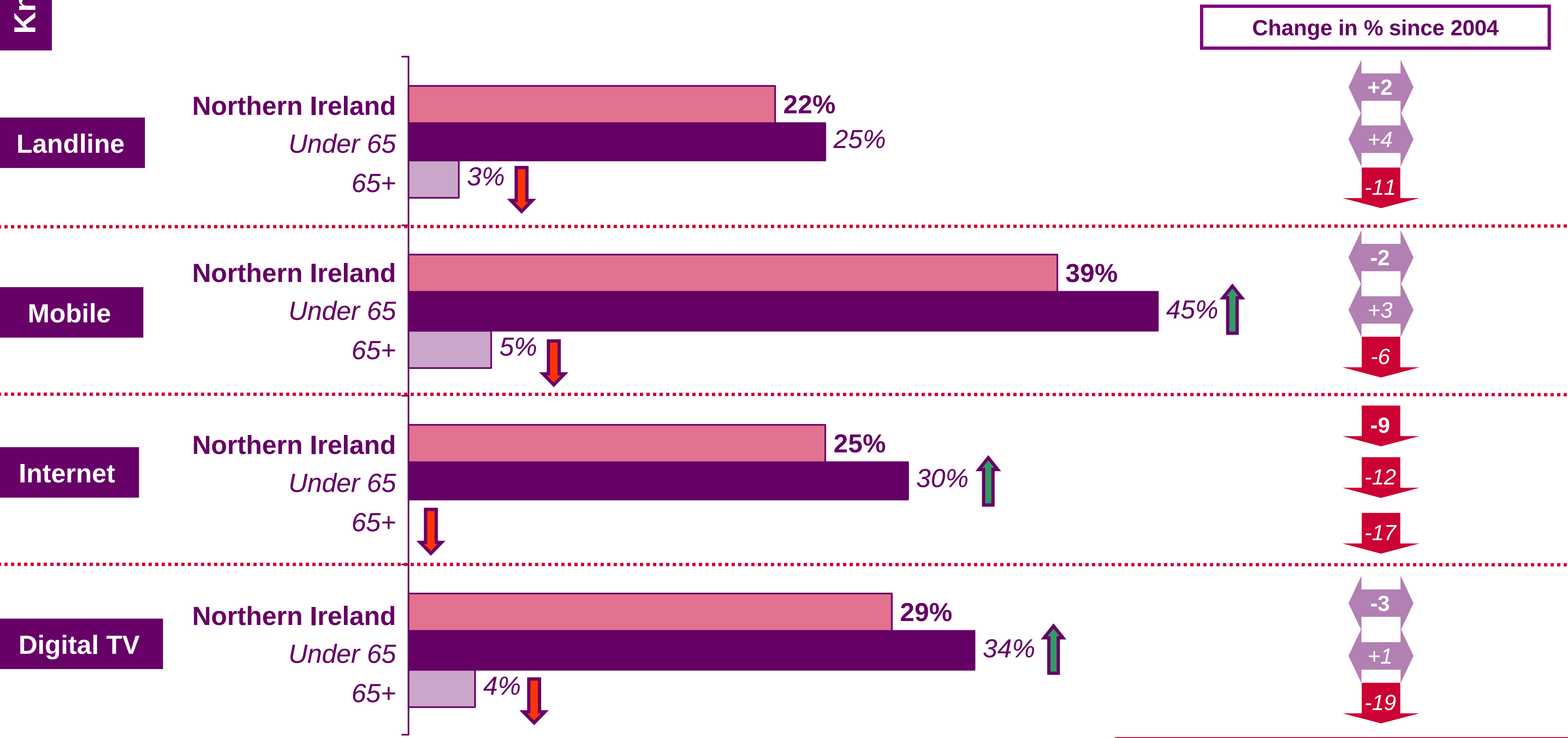
Knowledge

- Older consumers (aged 65 and over) continue to be the least likely to keep informed about developments for communication services, with levels falling significantly since 2004



NB Low base size - treat as indicative only

Base : All respondents in Northern Ireland (356), Under 65s (286) and 65+ (*70)

Indicates significantly lower or higher than **2005 Northern Ireland average**

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

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Knowledge

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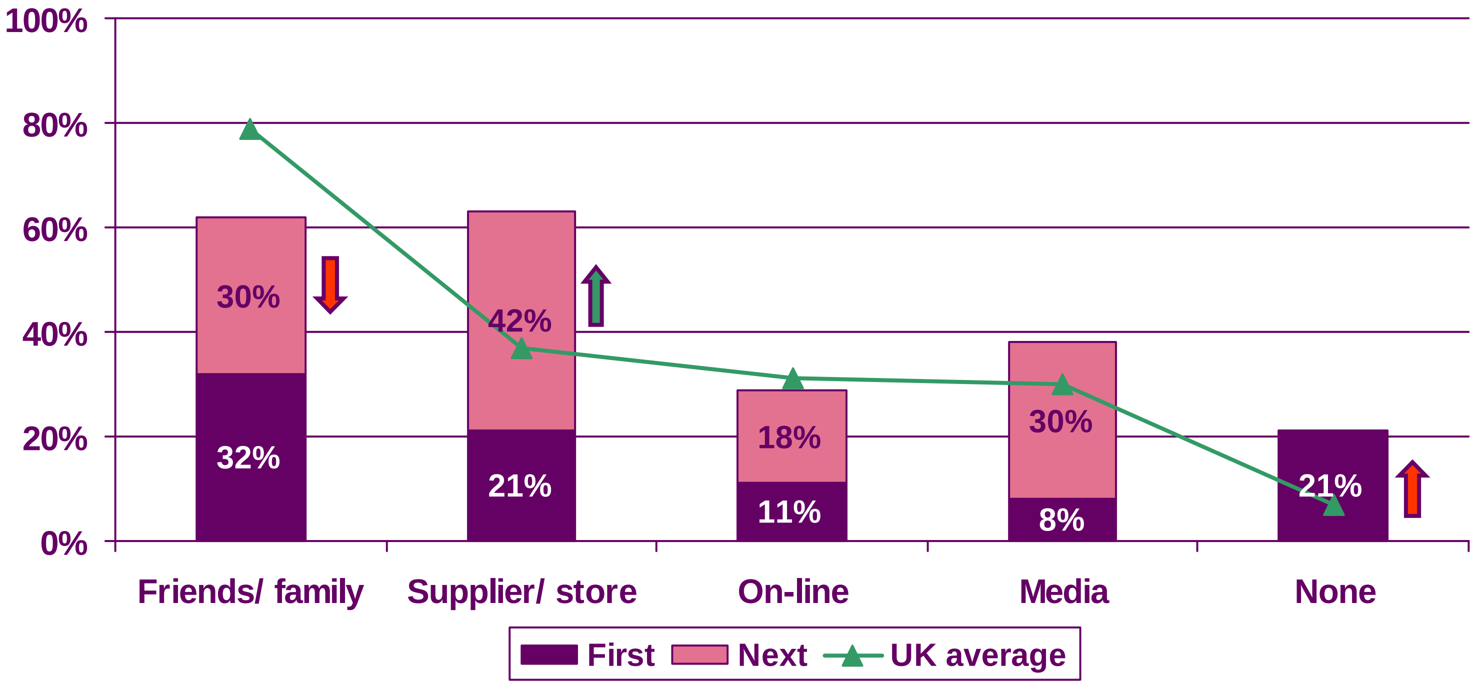
- Friends and family are the most popular initial source of advice and information on communications sources for consumers in Northern, with suppliers/ stores selling the services equally likely to be mentioned overall, with suppliers/ stores seeing a significant increase in nominations since 2004
- Consumers in Northern Ireland are significantly more likely to nominate suppliers/ stores and less likely to nominate friends and family than consumers across the UK as a whole

	Friends/ family	Supplier/ store	On-line	Media	None
Change in % since 2004 Northern Ireland	+4	+16	+4	+20	+6
Change in % since 2004 UK	*+10*	*-2*	*+9*	*-1*	*-1*



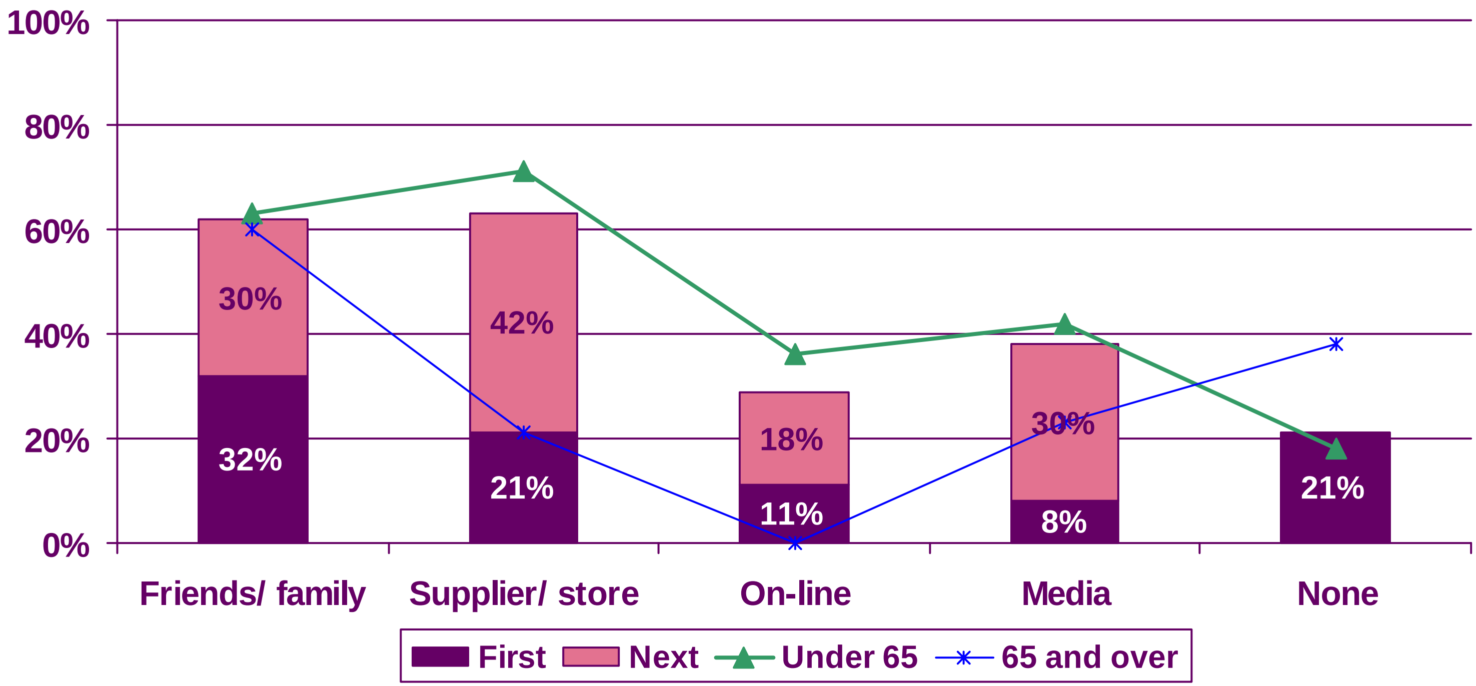
Indicates significantly lower or higher than **2005 UK average**

Base : All respondents in Northern Ireland (356) and UK overall (2,689)

Sources of advice and information - comparison by age

- Older consumers (aged 65 and over) in Northern Ireland continue to be significantly less likely to nominate sources of advice or information on communication services – with around two in five of this age group unable to nominate any sources

	Friends/ family	Supplier/ store	On-line	Media	None
Change in % since 2004 Northern Ireland	+4	+16	+4	+20	+6
Change in % since 2004 Under 65	+3	+20	+9	-16	+9
Change in % since 2004 65 and over	+16	+14	-12	+21	-3



Base : All respondents in Northern Ireland (356), Under 65s (286) and 65+ (*70)

**NB Low base size - treat as indicative only*

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

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Ownership

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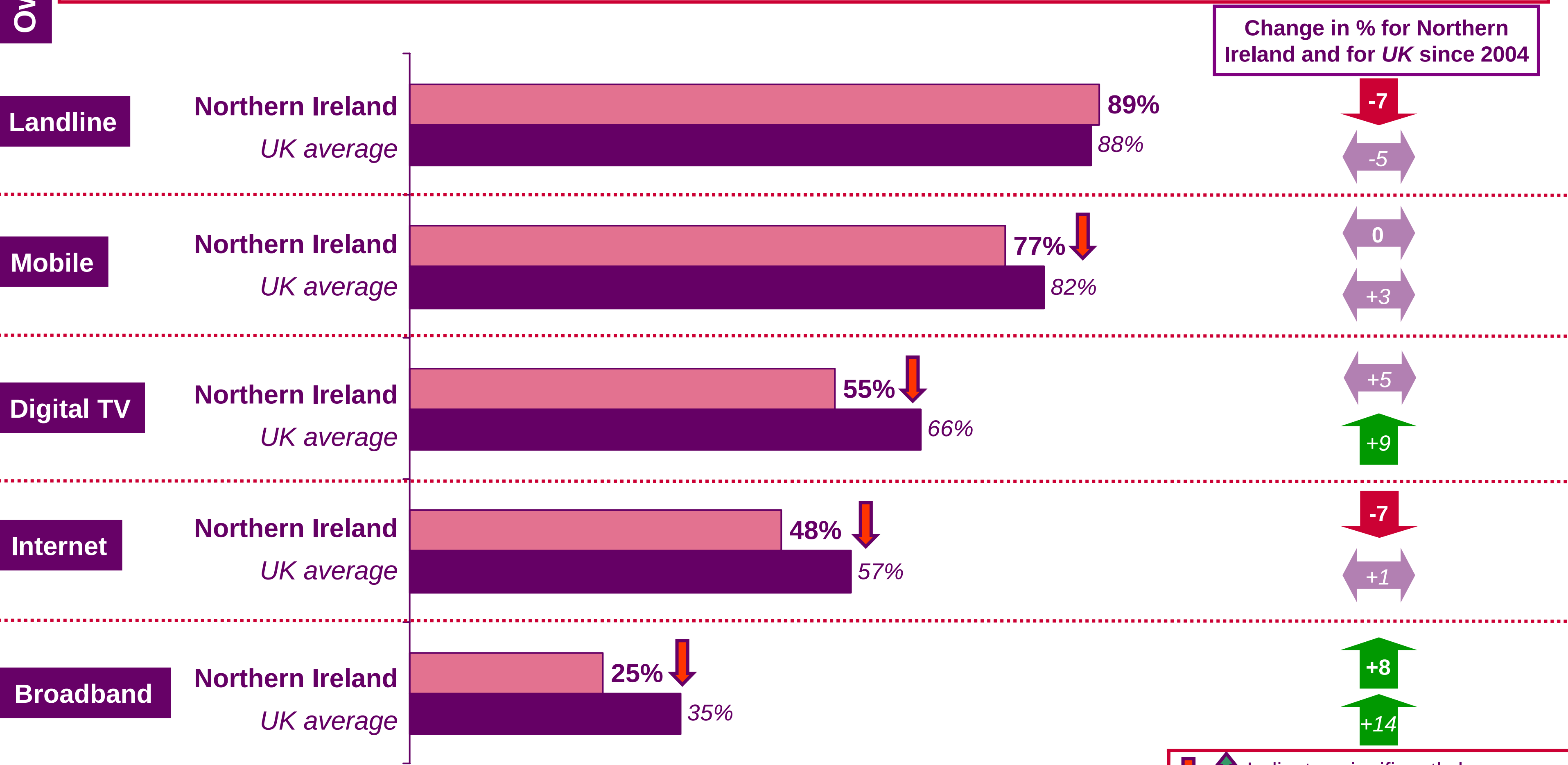
- Consumers in Northern Ireland are significantly less likely to own each of the platforms compared to the UK as a whole, with the exception of landline
- Ownership of landlines has decreased significantly since 2004 amongst consumers in Northern Ireland, as is also the case for the UK as a whole, with a significant increase in broadband access to the internet, again as for the UK as a whole. The increase for digital TV is ‘borderline’ significant.



Base : All respondents in Northern Ireland (356) and UK overall (2,689)

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

Multiple platform ownership - comparison to UK

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Ownership

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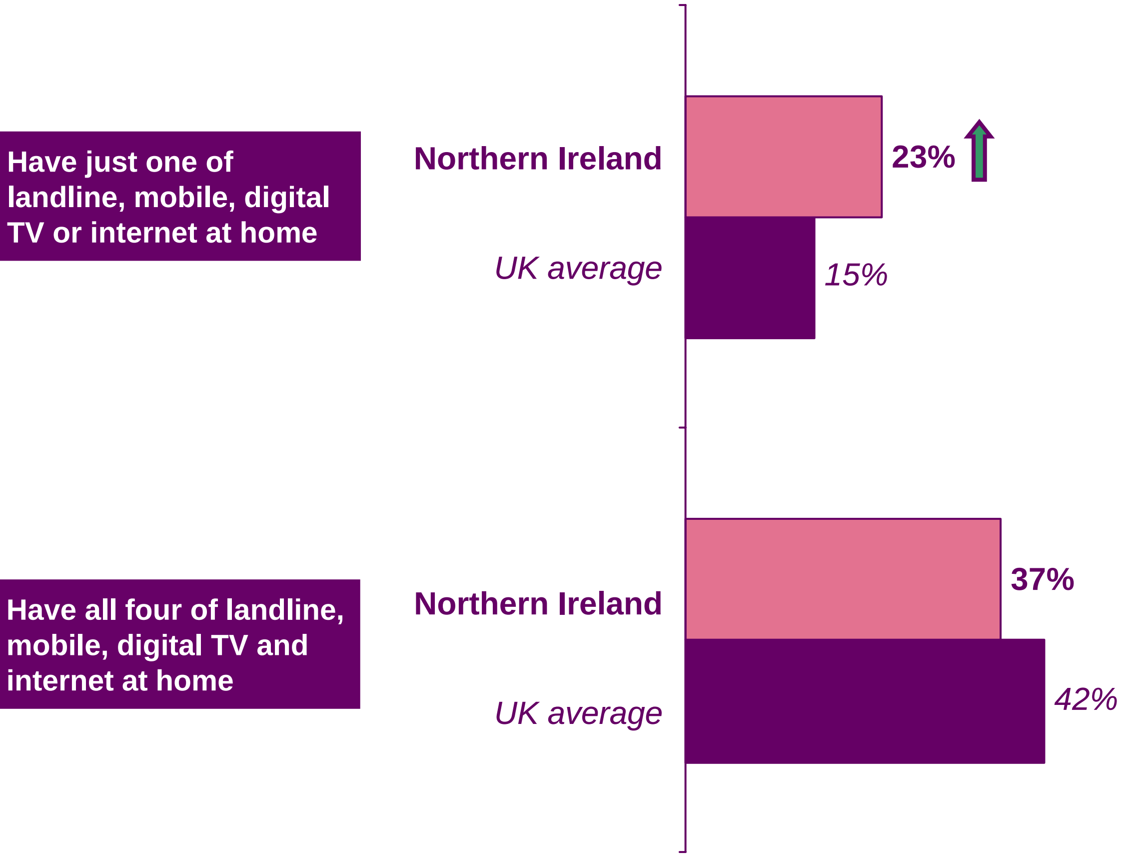
- One in four consumers in Northern Ireland own just one of the four communications technologies (landline, mobile phone, digital TV or the internet), significantly above the UK average
- The lower proportion owning all four of these types communications technology is 'borderline' significant less common amongst consumers in Northern Ireland compared to the UK as a whole, due to lower ownership levels generally for each of the platforms except for landline



Base : All respondents in Northern Ireland (356) and UK overall (2,689)

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

Voluntary and involuntary exclusion - comparison to UK

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Ownership

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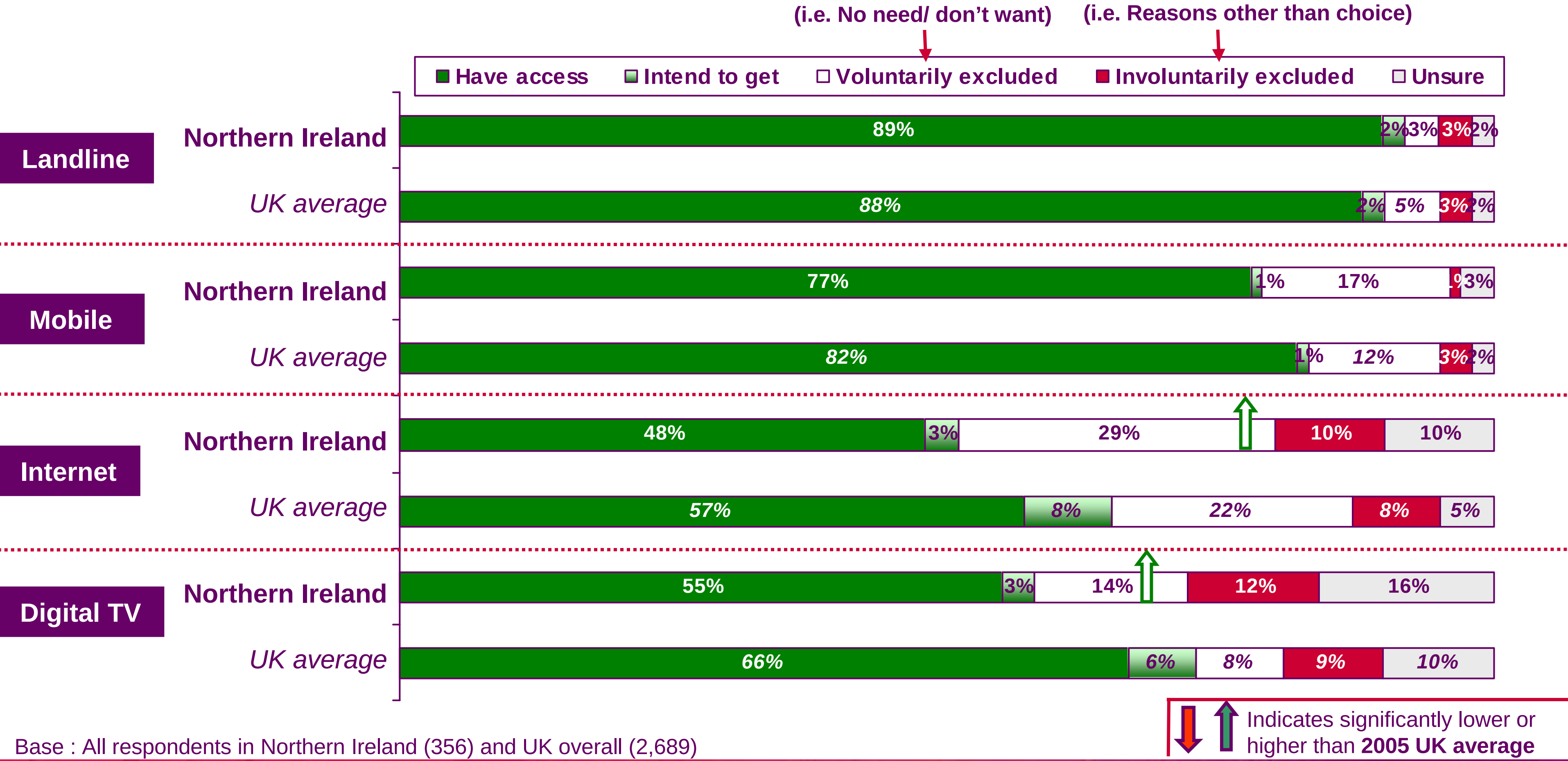
- For each of the four communications technologies, involuntary exclusion is principally due to affordability (i.e. monthly charges, usage charges, cost of equipment)
- Consumers in Northern Ireland are significantly more likely to be voluntarily excluded from having the internet and digital TV at home compared to the UK as a whole



Base : All respondents in Northern Ireland (356) and UK overall (2,689)

Voluntary and involuntary exclusion - change since 2004

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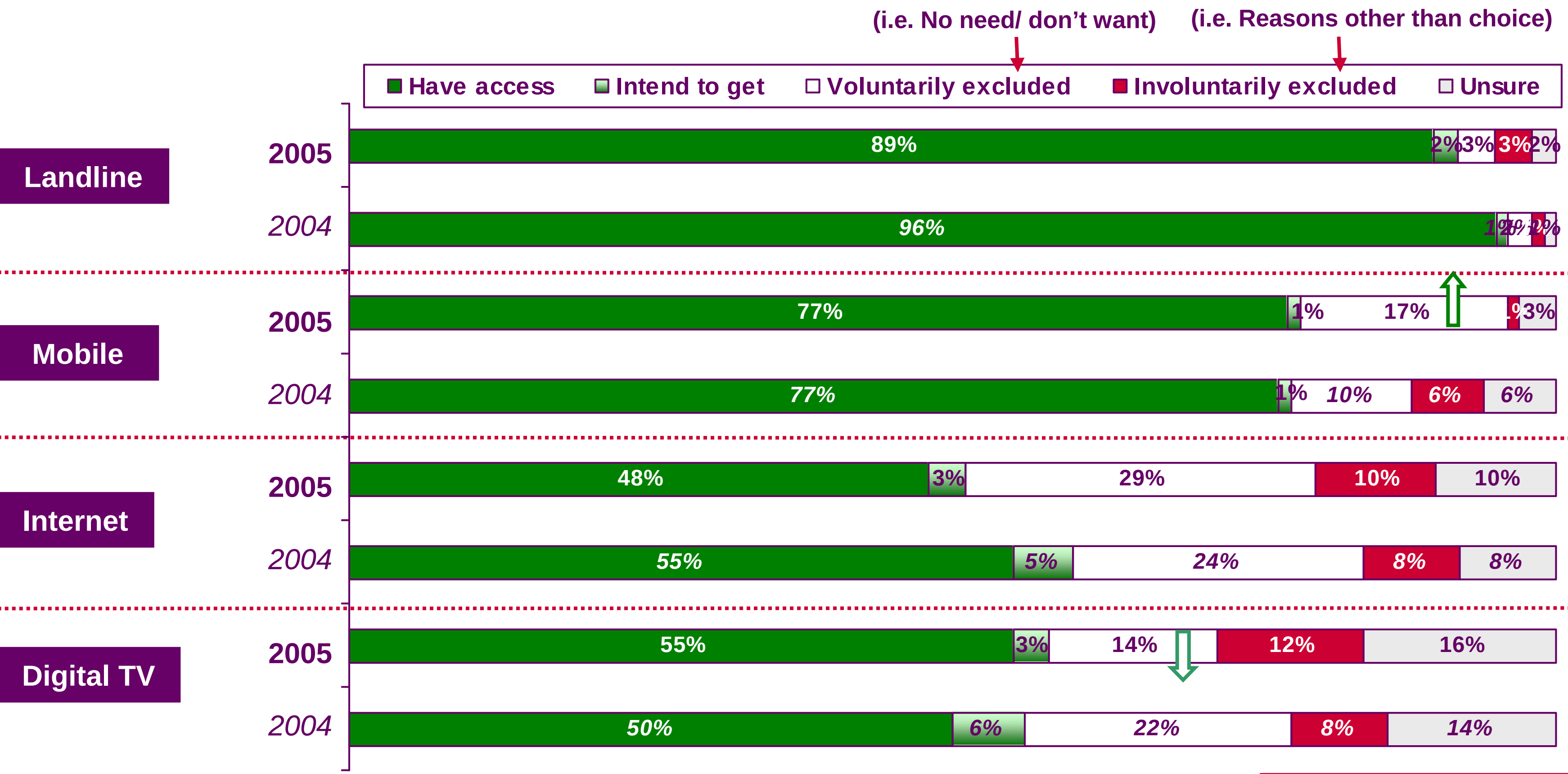
- Compared to 2004 levels of voluntary and involuntary exclusion have not changed to a significant extent for consumers in Northern Ireland regarding landlines and the internet
- Mobile phones see an increase in voluntary exclusion, due to a decrease in involuntary exclusion
- Digital TV sees a decrease in voluntary exclusion due to the increase in ownership levels



Indicates significantly lower or higher than **2004 Northern Ireland**

Base : All respondents in Northern Ireland 2005 (356) and 2004 (343)

Mobile phone uses - comparison to UK

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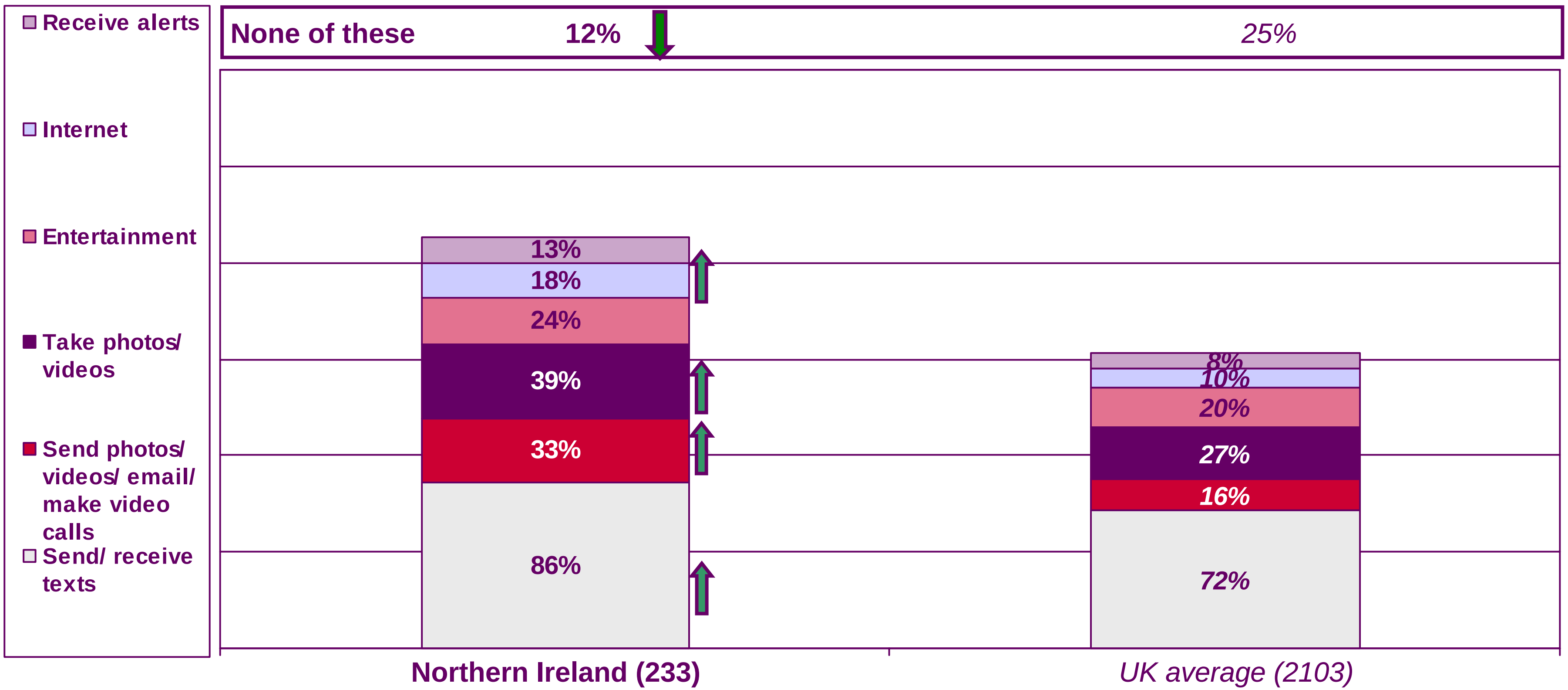
- Amongst consumers in Northern Ireland, a minority of mobile phone owners use their phone on a weekly basis for any of the uses shown beyond sending and receiving text messages, but just one in ten do not make any of these uses on a weekly basis – significantly below the UK non-use level
- Compared to the UK average, mobile phone owners in Northern Ireland are more likely to make each of the types of use shown, to a significant extent for text messaging, sending photos, taking photos and accessing the internet using their mobile phone

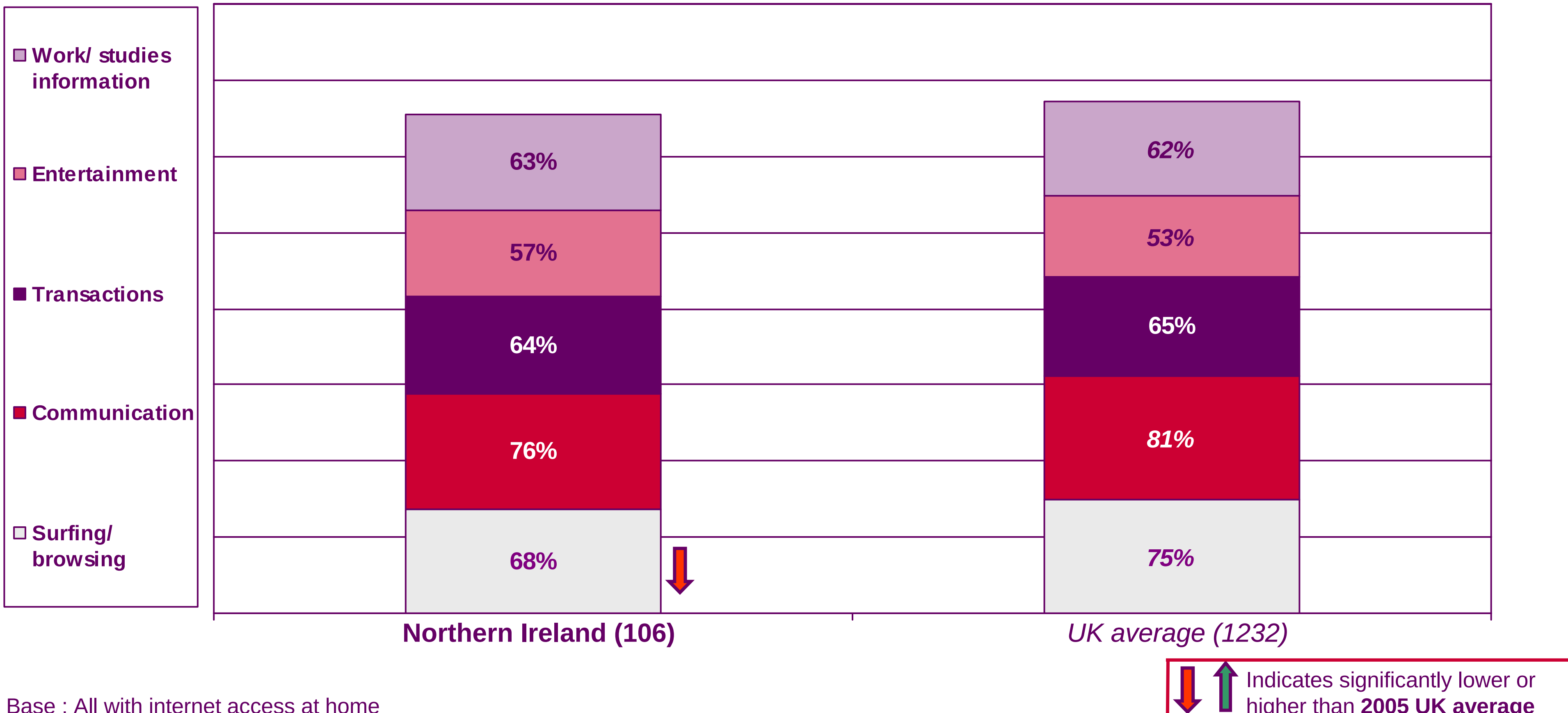


Indicates significantly lower or higher than **2005 UK average**

Base : All who use a mobile phone

Internet uses - comparison to UK

- Amongst consumers in Northern Ireland, those with internet access at home make a broadly similar use of the internet compared to the UK average, but with lower use of the internet for surfing/ browsing
- Findings for the UK show those with broadband access make more uses of the internet compared to those with dial-up access. There are insufficient interviews with dial-up users in Northern Ireland to make this comparison



Base : All with internet access at home

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Average monthly spend – comparison to UK

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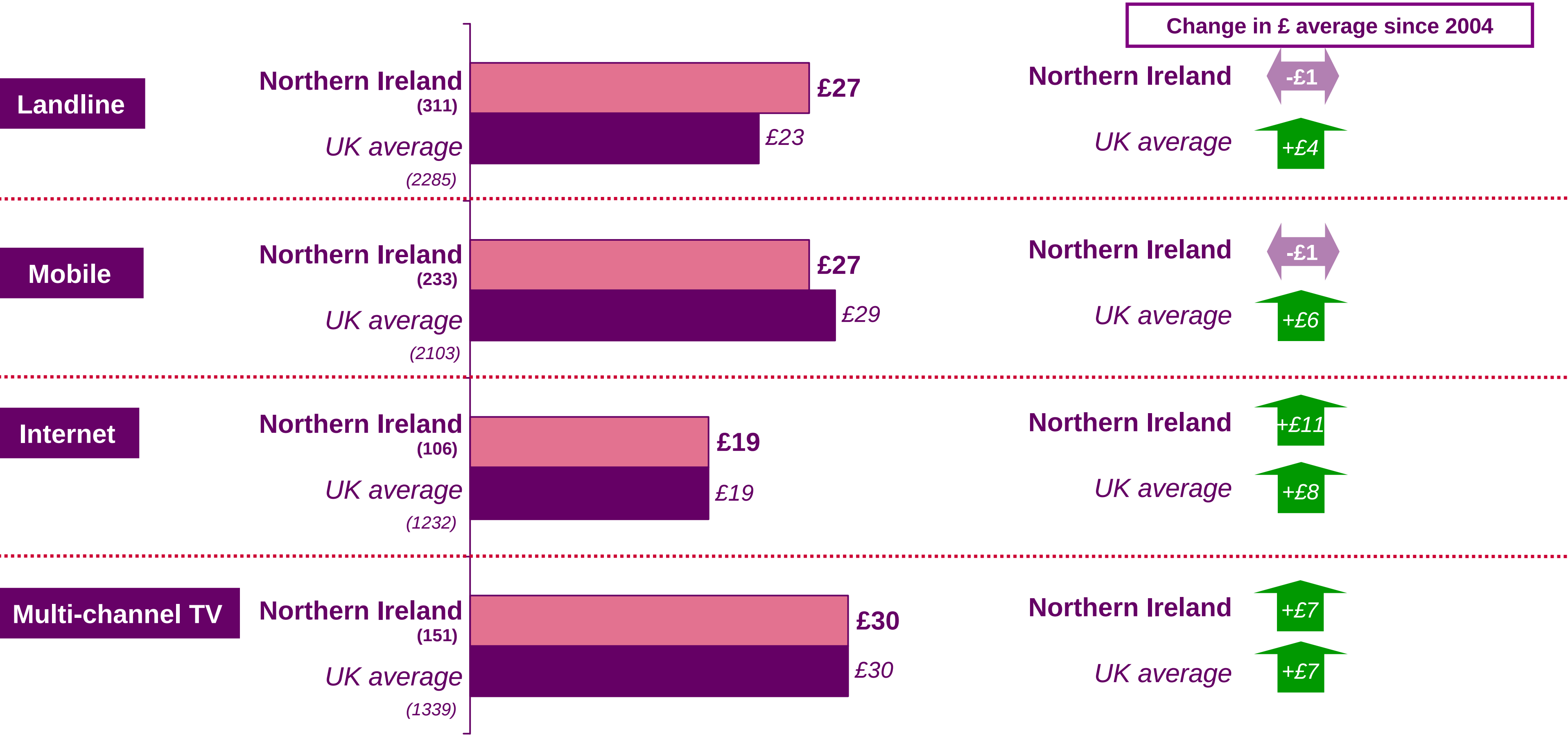
Usage

- Amongst owners of each type of device/ service in Northern Ireland the average self-reported monthly spend is broadly similar to the UK average
- As with the UK as a whole, the average monthly internet and multi-channel TV spend has increased compared to 2004. The increase in internet spend is likely to have been affected by the increase in the use of broadband; with broadband users generally spending more.



Base : Owners of each type of device/ service

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Concerns regarding services amongst owners

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Concerns

Landline (311)

38% have any concerns or worries (30% for UK)
- 34% costs
- 7% privacy (unsolicited calls)

Higher level of reported concerns amongst older people aged 65+

Increased from 28% with any concerns or worries in 2004

Mobile phone (233)

50% have any concerns or worries (31% for UK)
- 39% costs
- 12% choice/ access/ coverage
- 11% health issues

Higher level of reported concerns amongst younger owners

Increased from 29% with any concerns or worries in 2004

Internet (106)

59% have any concerns or worries (41% for UK)
- 50% spam/ pop-ups/ viruses/ control
- 32% security
- 11% cost of access

Base too low to report on differences

Increased from 35% with any concerns or worries in 2004

Digital TV (188)

29% have any concerns or worries (24% for UK)
- 23% costs
- 8% choice/ access
- 7% content/ programming

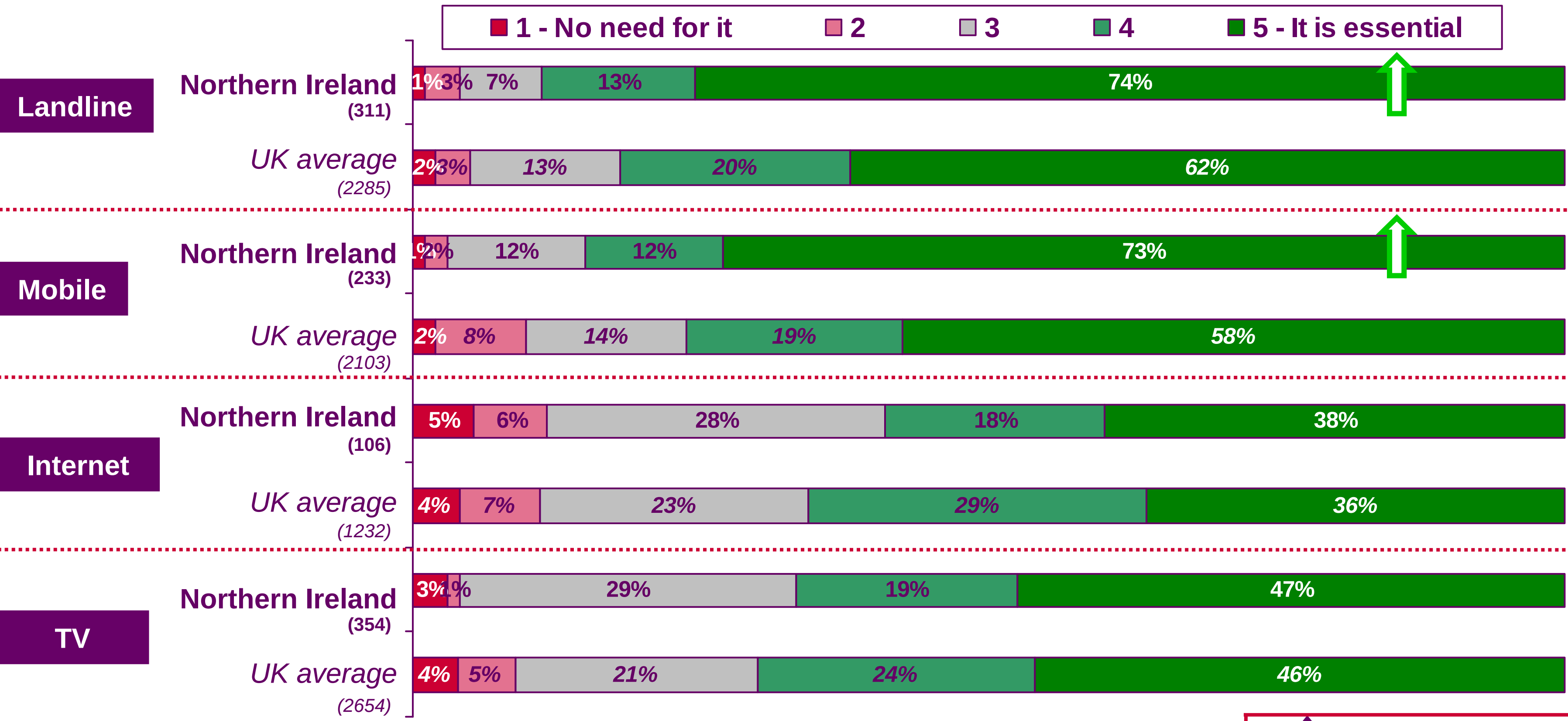
Higher level of reported concerns amongst older people aged 65+

Increased from 16% with any concerns or worries in 2004

Base : Owners of each type of device/ service

Importance of devices/ services owned - comparison to UK

- Amongst owners of each type of device/ service in Northern Ireland, landline and mobile phones are the most likely to be considered essential, with a minority of internet owners rating this service as being essential
- Compared to owners across the UK, those in Northern Ireland are more likely to consider their landline and mobile phone services to be essential, with older consumers aged 65 and over more likely to rate landlines as essential, compared to younger consumers for mobile phones



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

Base : Owners of each type of device/ service

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Importance of devices/ services owned - change since 2004

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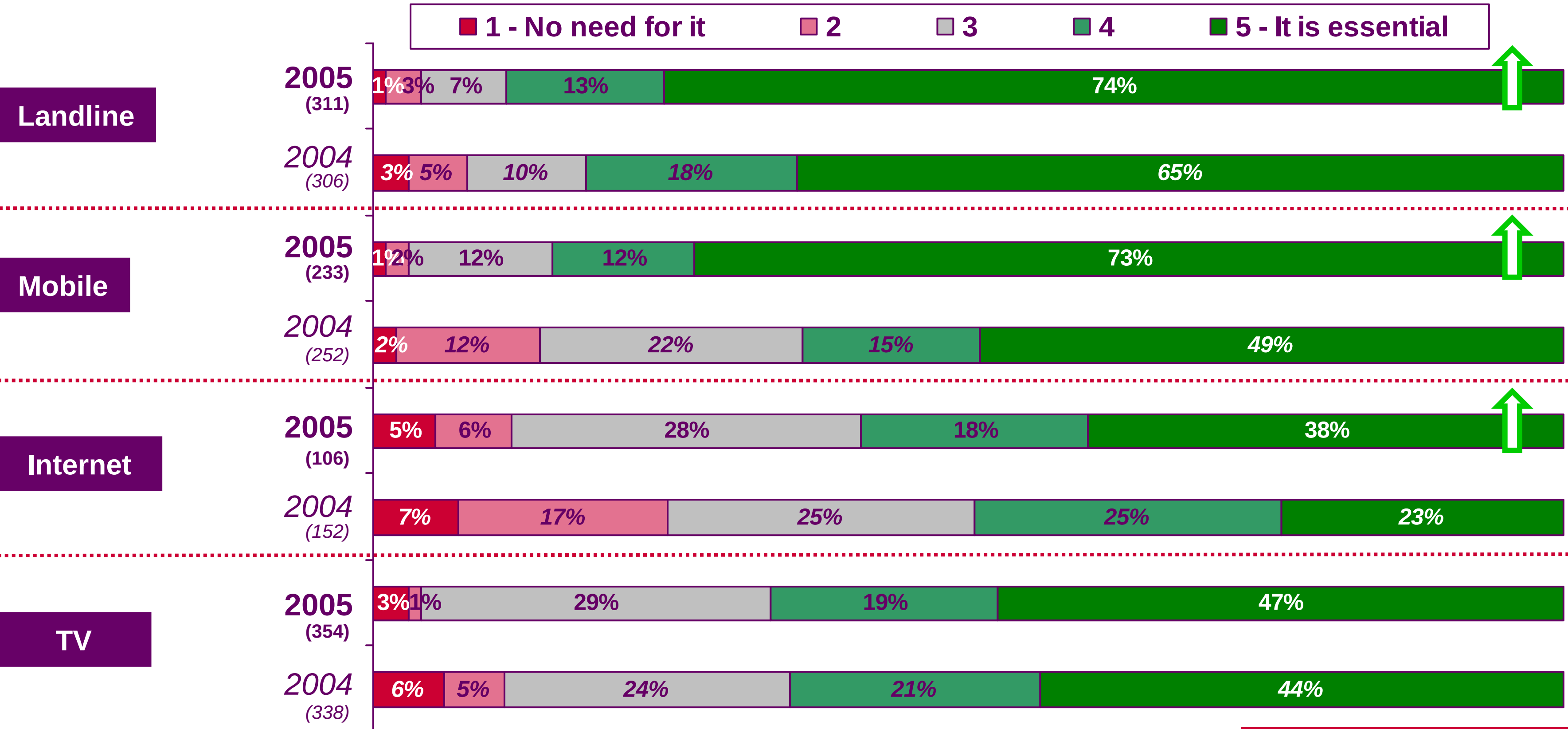
Attitudes

- Compared to 2004, owners in Northern Ireland are more likely to consider their landline service, mobile phone service and internet service to be essential.
- Across the UK there has also been an increase in rating mobile phones as essential, but a decrease in rating landline phones as essential. Findings for owners in Northern Ireland are different in respect of landlines. The UK as a whole sees no change in the importance of the internet service.



Indicates significantly lower or higher than **2004 Northern Ireland**

Base : Owners of each type of device/ service

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

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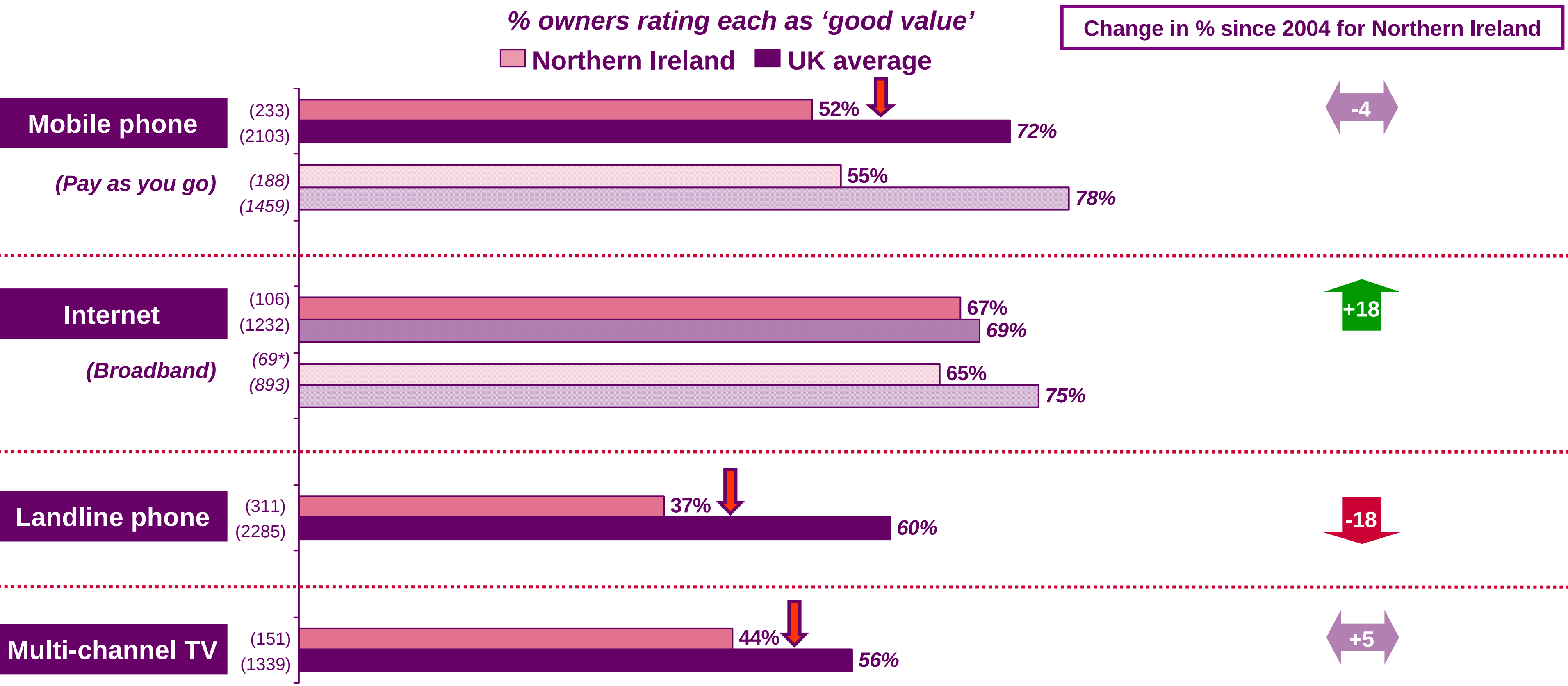
- The internet service is most likely to be rated as providing good value by owners of each type of device/ service in Northern Ireland, and sees a significant increase in 'good value' nominations compared to 2004
- Users of mobile phone, landline and TV services perceive lower levels of 'good value' from these services compared to the UK average, with landline services seeing a significant negative shift in being rated as 'good value' since 2004

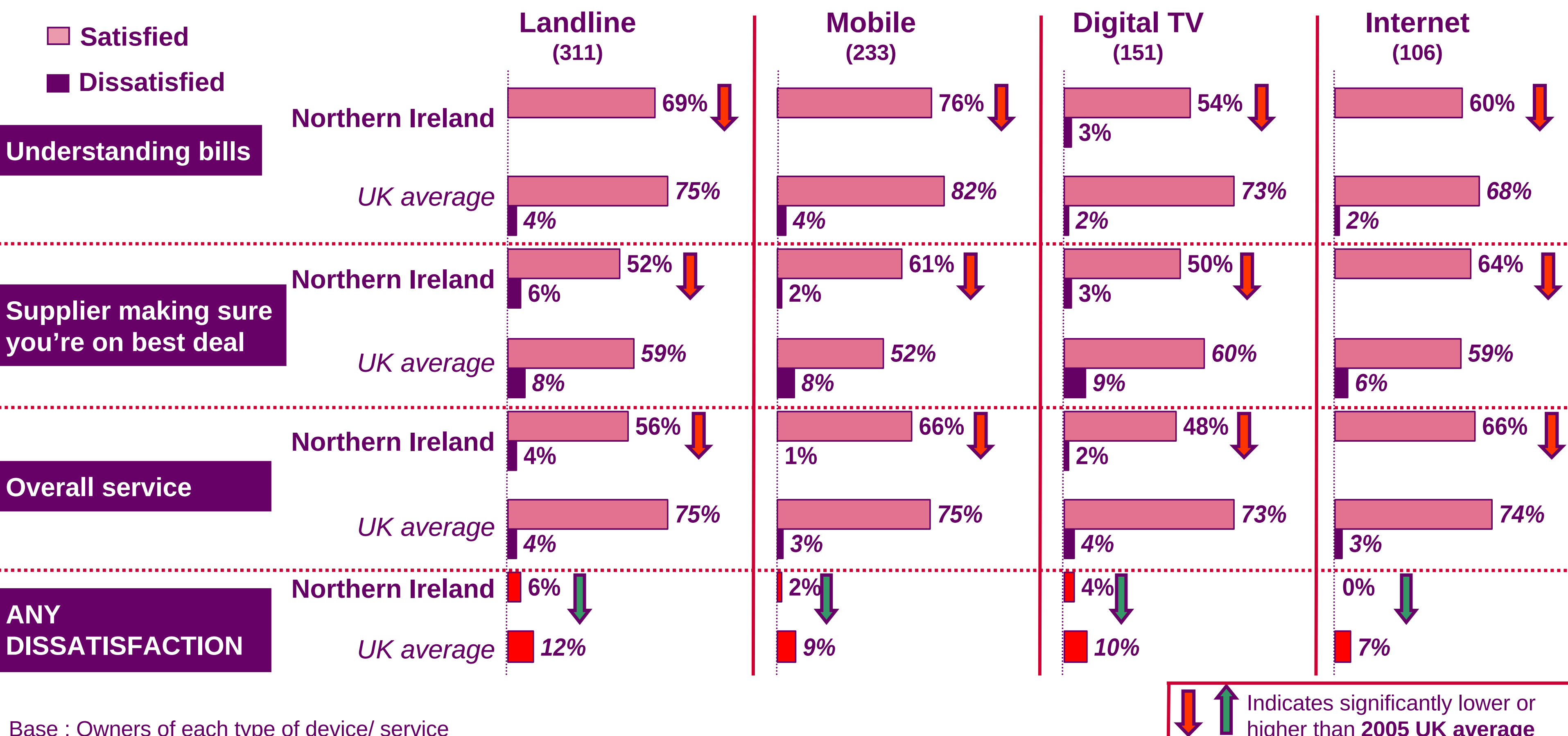


*NB Low base size - treat as indicative only
Base : Owners of each type of device/ service

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

Satisfaction with communications services and suppliers - comparison to UK

- Each aspect of service for each of the four services see significantly lower levels of satisfaction compared to the UK average, however, this is due to a higher proportion of users in Northern Ireland responding with a neutral or ‘don’t know’ rating, and so overall levels of dissatisfaction are also below the UK average
- Lowest satisfaction regarding ‘Your supplier making sure you are on the best of their deals for you’, as for the UK overall



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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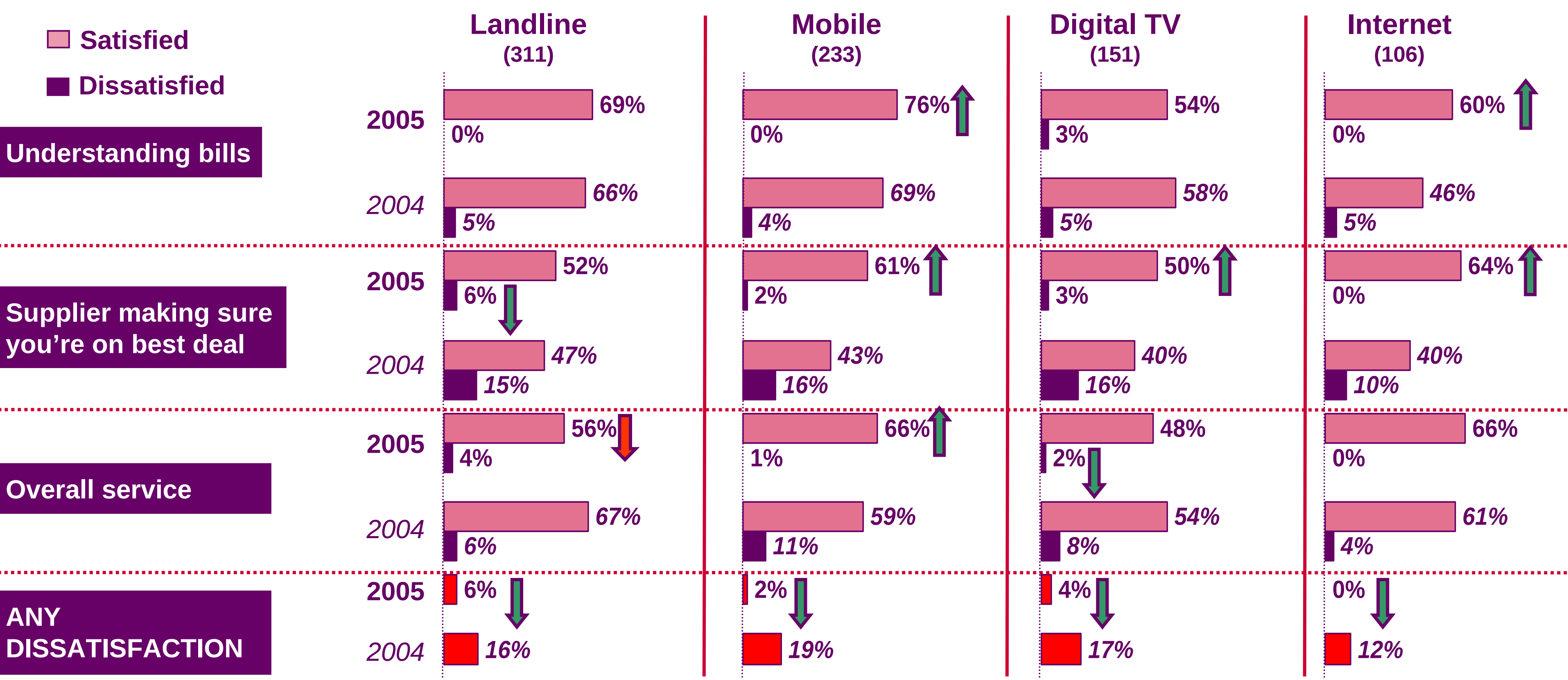
Attitudes

- Amongst consumers in Northern Ireland, services see an increase in satisfaction for ‘Supplier making sure you’re on the best deal’ except landline service, with the mobile phone service seeing an increase in satisfaction for each aspect covered
- Whilst ‘…making sure you are on the best of their deals for you’ remains the lowest rated aspect, satisfaction has improved for services except landline



Indicates significantly lower or higher than **2004 Northern Ireland**

Base : Owners of each type of device/ service

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Switching suppliers - comparison to UK and change since 2004

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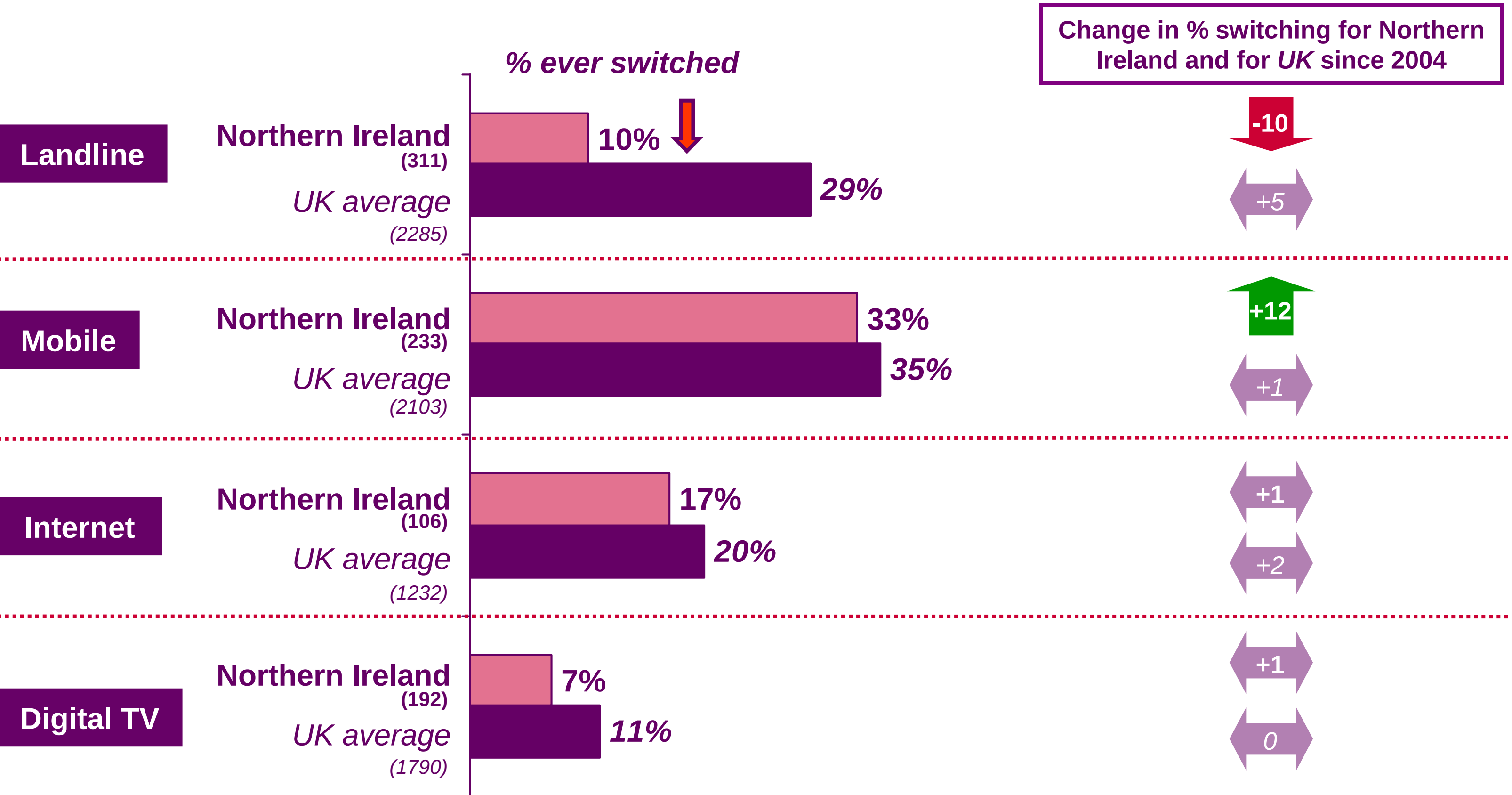
Switching

- Consumers in Northern Ireland are most likely to have ever switched suppliers for their mobile phone service, as for the UK overall, and the incidence of having ever changed the company used has increased significantly since 2004
- Experience of switching landline service suppliers is lower in Northern Ireland compared to the UK overall, and has fallen significantly since 2004.



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

Base : Owners of each type of device/ service

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Mobile tariff checking to ensure best deal - comparison to UK

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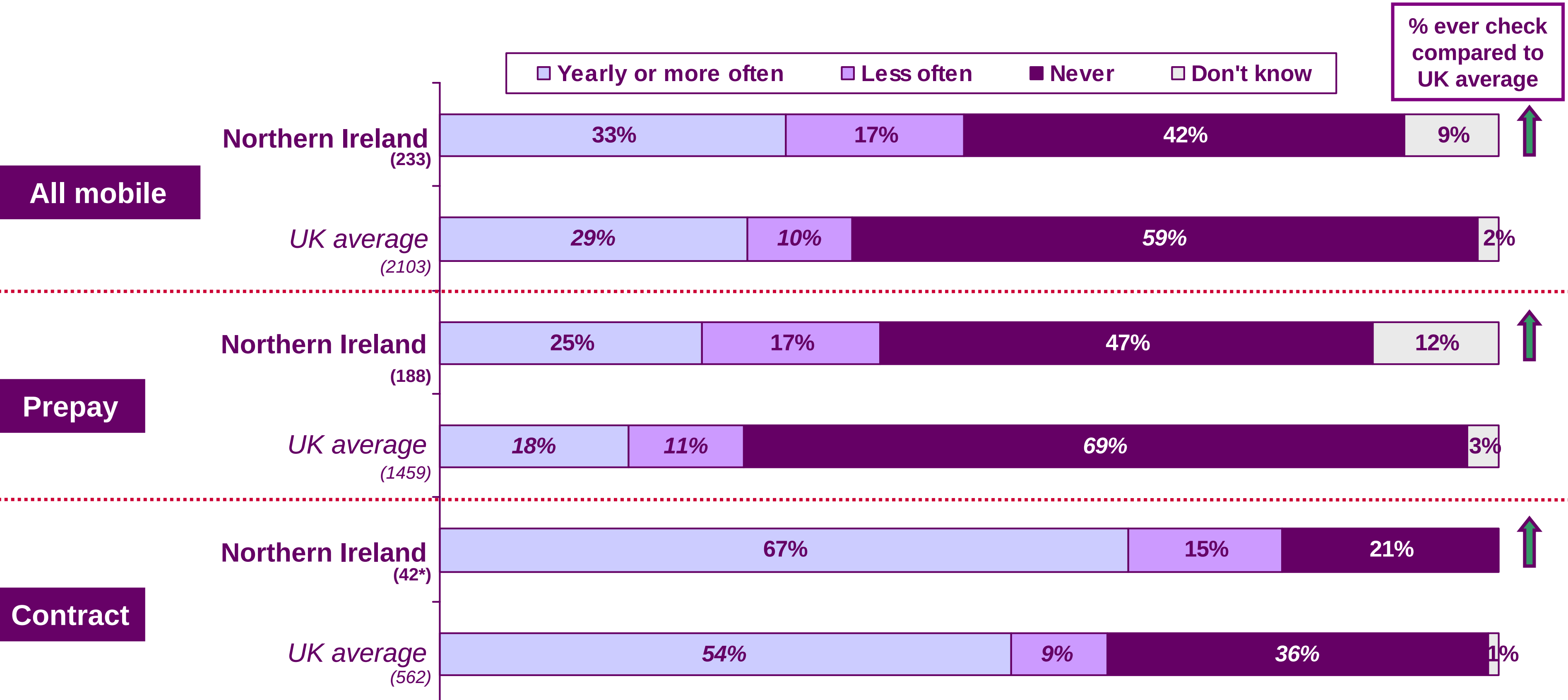
Usage

- Half of all consumers in Northern Ireland with a mobile phone ever check whether they are on the best tariff or deal, higher than the UK overall
- Those with a contract for their phone are significantly more likely to ever check, with both contract and pay as you go users above the UK average



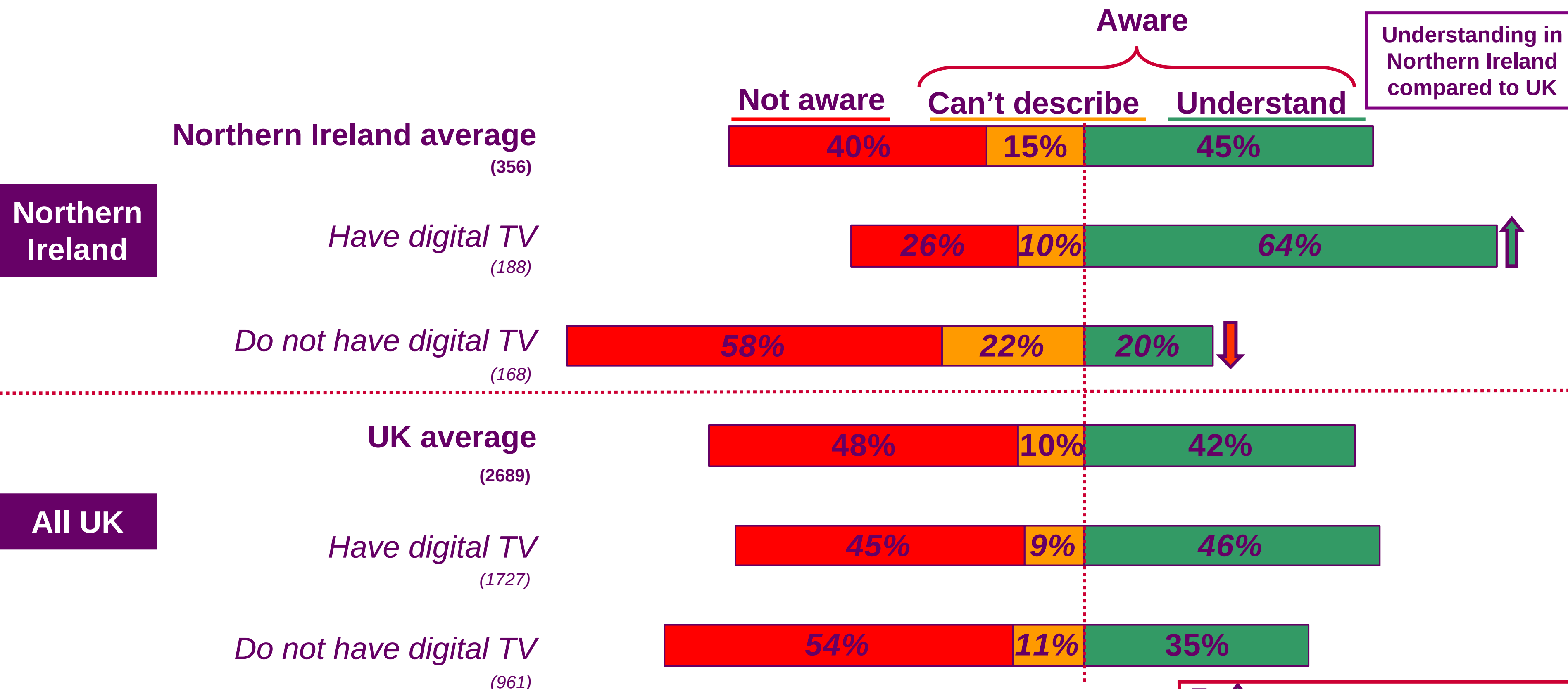
*NB Low base size - treat as indicative only

Base: All who use a mobile phone

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

Awareness and understanding of Digital switchover - comparison to UK

- Close to half of all consumers in Northern Ireland have heard the term digital switchover and are able to describe what the tern refers to (‘Understand’), at around the same level as the UK average
- Those who already have digital TV are the most likely to understand digital switchover, and to a greater extent in Northern Ireland than the UK average. Understanding amongst those who don’t have digital TV is at a much lower level than the equivalent measure for the UK as a whole, however.



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

Base : All respondents

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Awareness and understanding of Digital switchover - change since 2004

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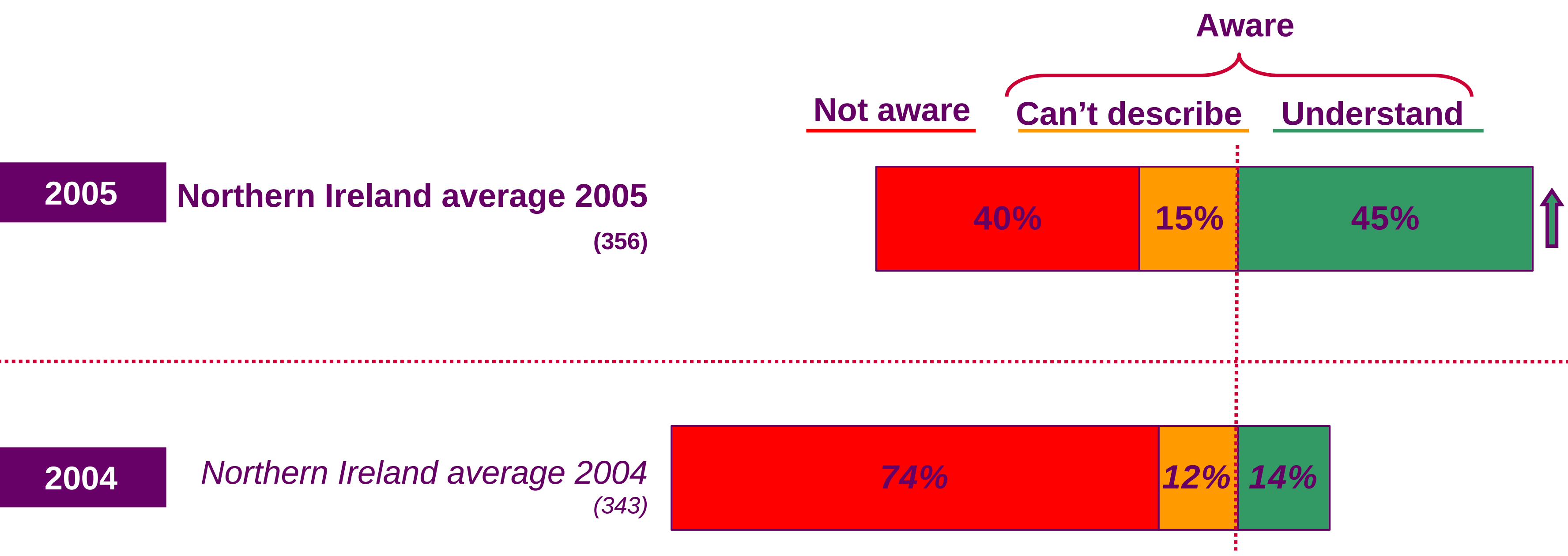
- Understanding of the term digital switchover has increased significantly amongst consumers in Northern Ireland compared to 2004; rising by 31% to account for 45% of all consumers in Northern Ireland
- Understanding is lower amongst consumers in Northern Ireland in low income households, those in rural areas, the oldest adults, and (as shown previously) those who do not already have digital TV



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Base: All respondents