


# **Ofcom Consumer Panel Research Quantitative Research Findings**






## **Focus on people aged 65 and over**

**June 2006**

## Report outline

- This report compares the findings for residential consumers aged 65 and over with those residential consumers in the **UK overall**
  - measures for the 2004 survey are also shown for comparison
  - plus some comparisons made with those aged 15-64
- Differences shown of  $\pm 5\%$  (where based on all respondents) are statistically significant
- Where findings for people aged 65 and over 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 people aged 65 and over 
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

## Profile of vulnerable groups by nation

	England 	Scotland 	Wales 	Northern Ireland 	UK TOTAL 	Interviews conducted
Older people (aged 65 plus)	16%	16%	18%	14%	16%	463
Rural	13%	16%	<b>22%</b>	<b>35%</b>	12%	266
Limiting long term illness/ disability	14%	<b>18%</b>	<b>29%</b>	15%	15%	738
Household income under £11,500	26%	<b>32%</b>	<b>43%</b>	29%	27%	1080
<b>TOTAL NATION SPLIT</b>	<b>84%</b>	<b>8%</b>	<b>5%</b>	<b>3%</b>	<b>100%</b>	
<b>INTERVIEWS CONDUCTED</b>	<b>1507</b>	<b>460</b>	<b>366</b>	<b>356</b>	<b>2689</b>	

**Knowledge**

- Lower understanding of each of the communication terms compared to the UK average, but increase since 2004 in understanding of broadband and digital TV
- Overall awareness (aware of term or aware of service capability) for each of the services is lower than the UK average
- Less likely than UK average to keep informed of developments regarding each of the communications services
- Friends and family are the most popular source of advice, and older people are less likely to refer to online sources and suppliers/ stores than the UK average
- Lower awareness of digital switchover compared to UK average, but a significant increase in awareness since 2004

**Ownership**

- Less likely than UK average to have a mobile phone, digital TV, internet access generally and broadband internet access in particular, but more likely to have a landline at home
- Higher level of involuntary exclusion for digital TV compared to the UK average, but all other services see higher levels of voluntary exclusion suggesting that lower ownership is through choice
- Increase since 2004 in ownership of mobile phone, digital TV and internet access

**Usage**

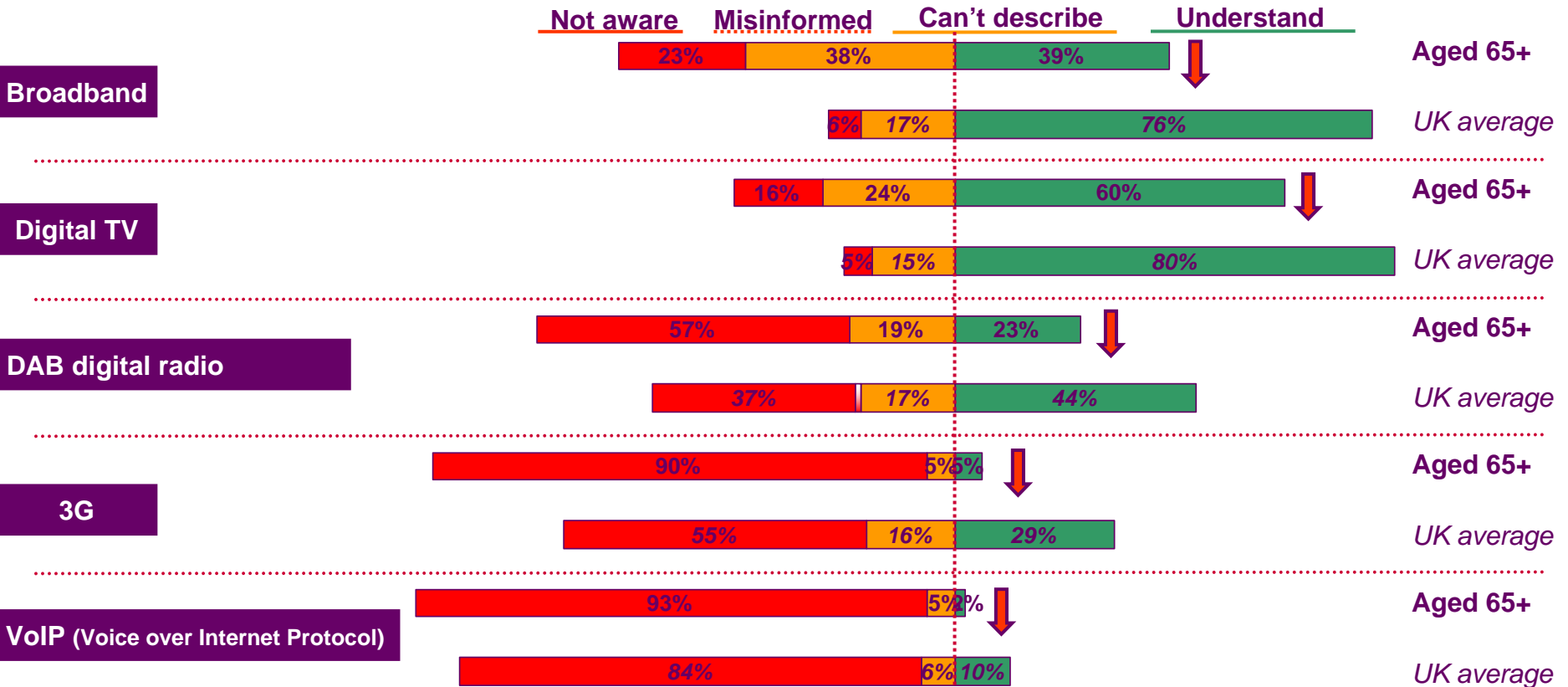
- Use made of mobile phone is very much narrower than the UK average, and also fewer uses made of the internet generally

**Attitudes**

- Generally lower levels of concerns or worries regarding services amongst owners compared to the UK average, but an increase in levels for landline and internet since 2004
- More likely to rate landline service as essential, with increase in the importance of mobile phone service since 2004
- Whilst satisfaction with landline service exceeds the UK average, other services see a more neutral response.
- Some indication of increased satisfaction since 2004 for digital TV and internet users

- Higher awareness for digital TV than all other communication terms amongst older people, with negligible awareness of 3G and VoIP
- Amongst older people awareness and understanding of each of the communication terms is significantly lower than the UK average
- Older people in low income households and females are the least aware of communication terms

Knowledge



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

# CONSUMER PANEL

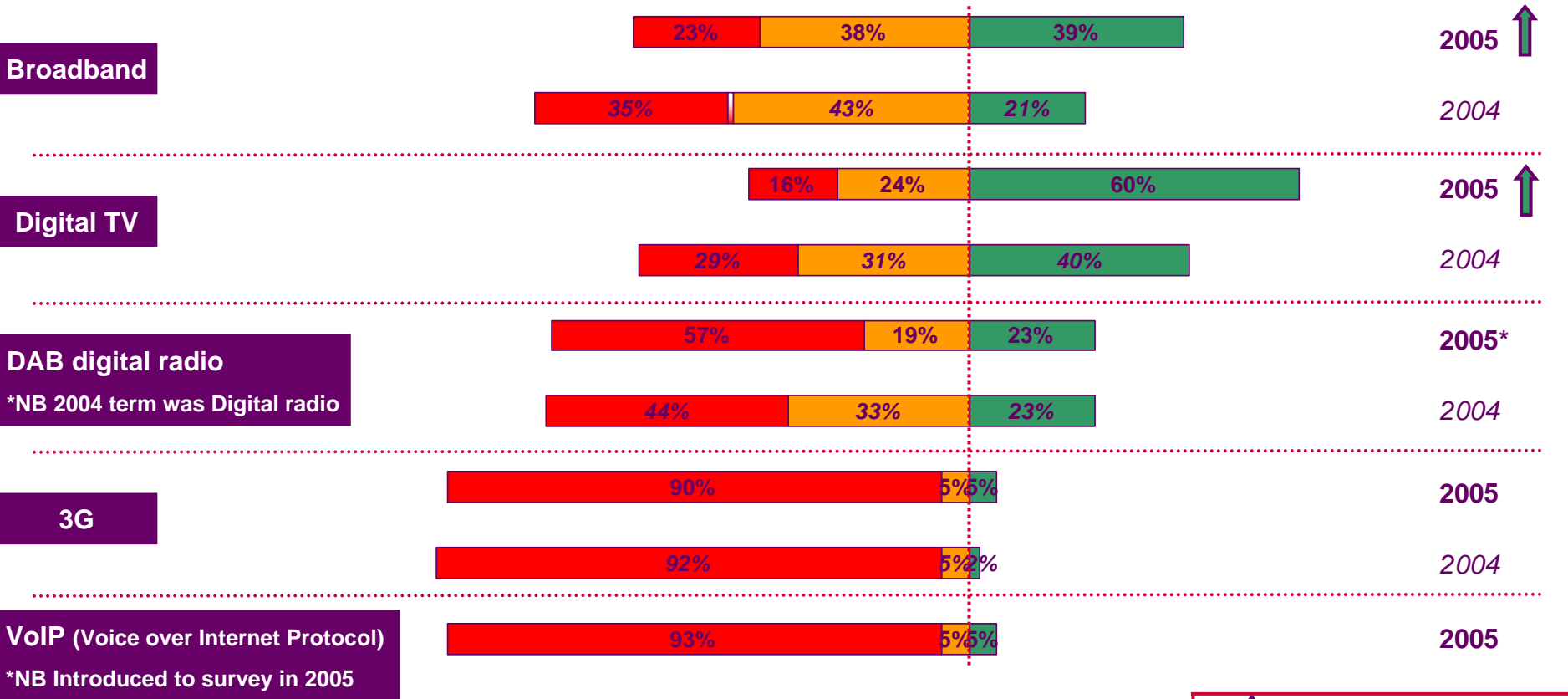
## Awareness and understanding of communication terms – change since 2004

PEOPLE AGED 65+

- Significant increases amongst older people in awareness and understanding of the communications terms broadband and digital TV

Knowledge

Not aware    Misinformed    Can't describe    Understand

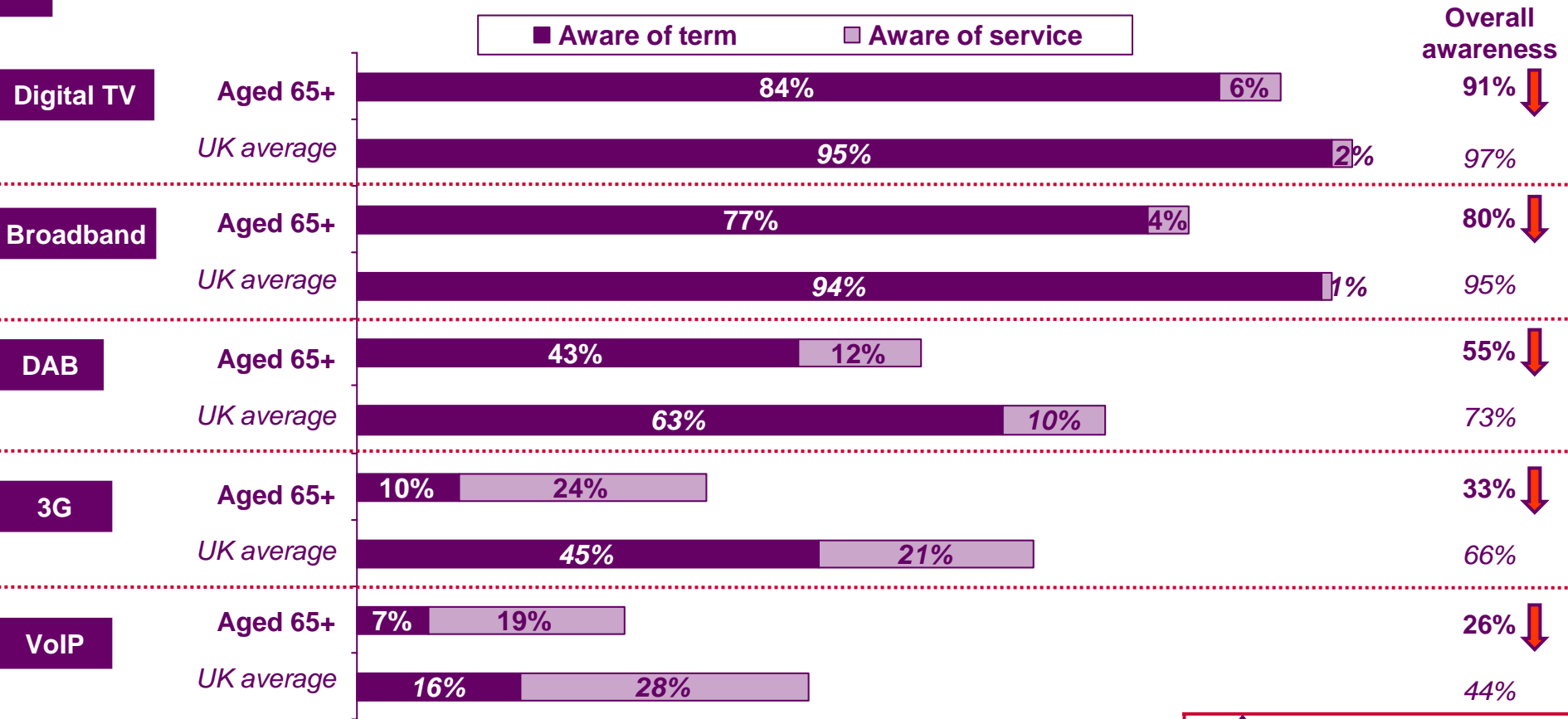


Base : All respondents aged 65 and over 2005 (463) and 2004 (352)

↓ ↑ Indicates significantly lower or higher than 2004 Aged 65+

- A significant proportion of older people are aware of the capability of DAB digital radio, 3G and VoIP once they are read a description of what these services provide.
- The levels of overall awareness amongst older people for each of the communications services is significantly below the UK average.

Knowledge



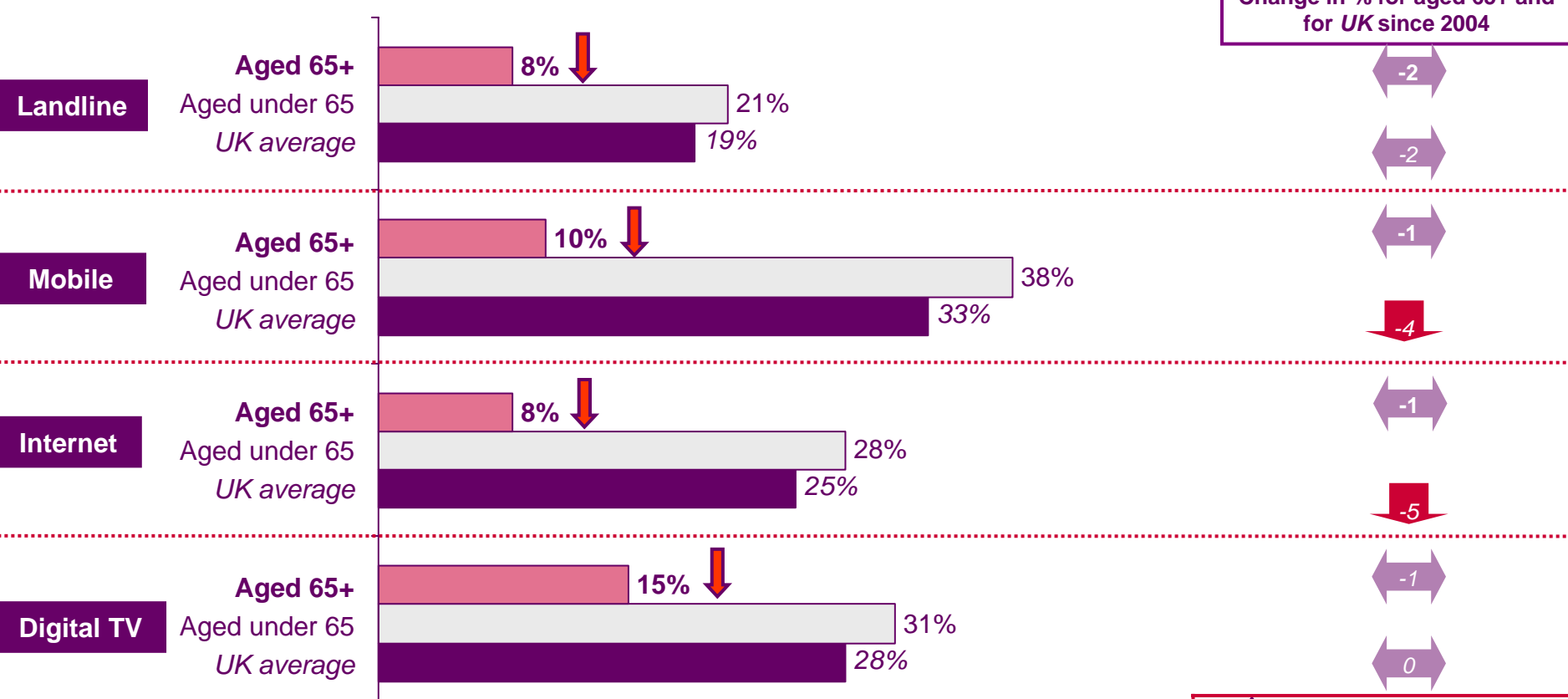
↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

- Older people are significantly less likely to keep themselves informed about developments for each of the technologies compared to the UK overall
- Largest gap between older and younger people in keeping informed about mobile phone services, and smallest gap regarding landlines
- Compared to 2004 there has been no real change in the degree to which older people keep themselves informed

Knowledge

Change in % for aged 65+ and for UK since 2004



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

# CONSUMER PANEL

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

PEOPLE AGED 65+

- Friends and family are the most popular source of advice and information on communications sources for older people, and see a significant increase in nominations since 2004, as do media sources (e.g. TV, radio, press)
- Older people are significantly less likely to nominate on-line sources and suppliers/ stores than consumers across the UK as a whole. The greatest gap between older and younger people relates to on-line sources of advice and information

Change in % since 2004 Aged 65+

+26

+2

+5

+10

-8

Change in % since 2004 UK

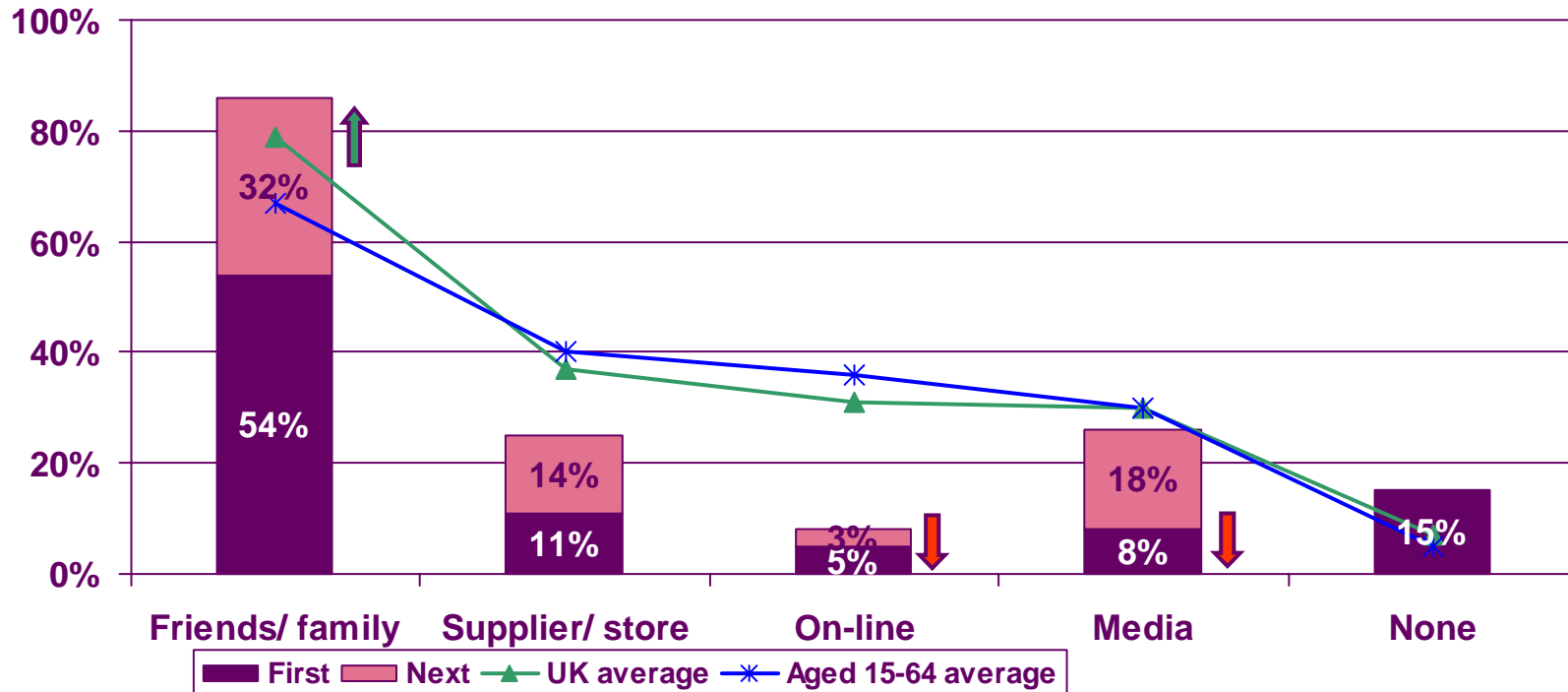
+10

-2

+9

-1

-1

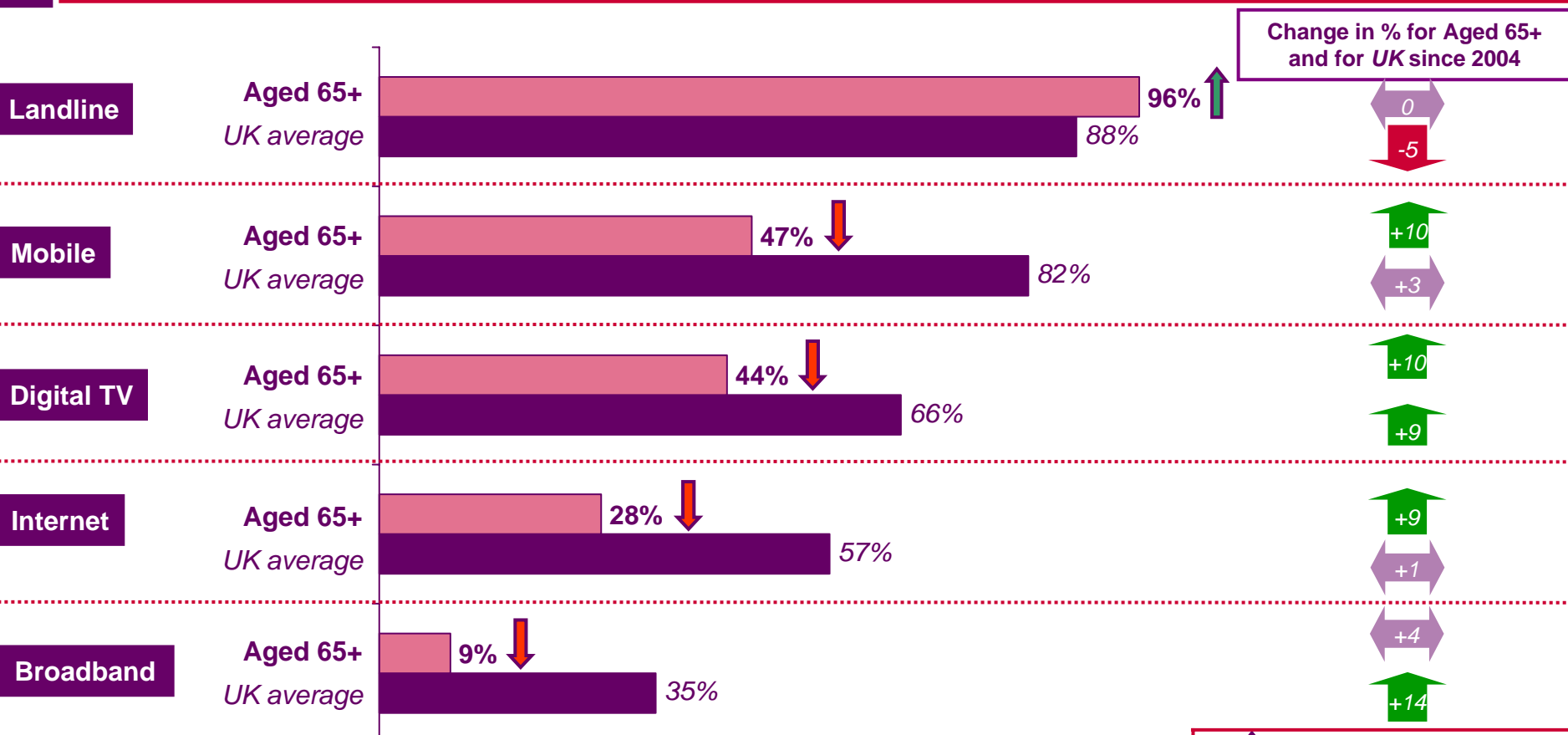


↑ ↓ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

- Older people are significantly less likely to have each of the platforms compared to the UK average, with the exception of a landline at home where ownership levels for older people are significantly higher than the UK average
- However, ownership of mobile phones, digital TV and internet has increased since 2004, with a 'borderline' significant increase for broadband

Ownership



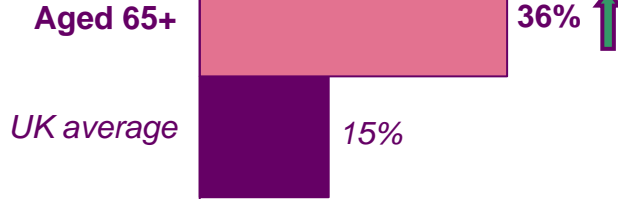
↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

- One in three older people own just one of the four communications technologies (landline, mobile phone, digital TV or the internet) – typically just a landline phone
- Owning all four of these types communications technology is significantly less common amongst older people compared to the UK as a whole, due to lower ownership levels for each of the platforms other than landline phones

Ownership

Have just one of  
landline, mobile, digital  
TV or internet at home



Have all four of landline,  
mobile, digital TV and  
internet at home

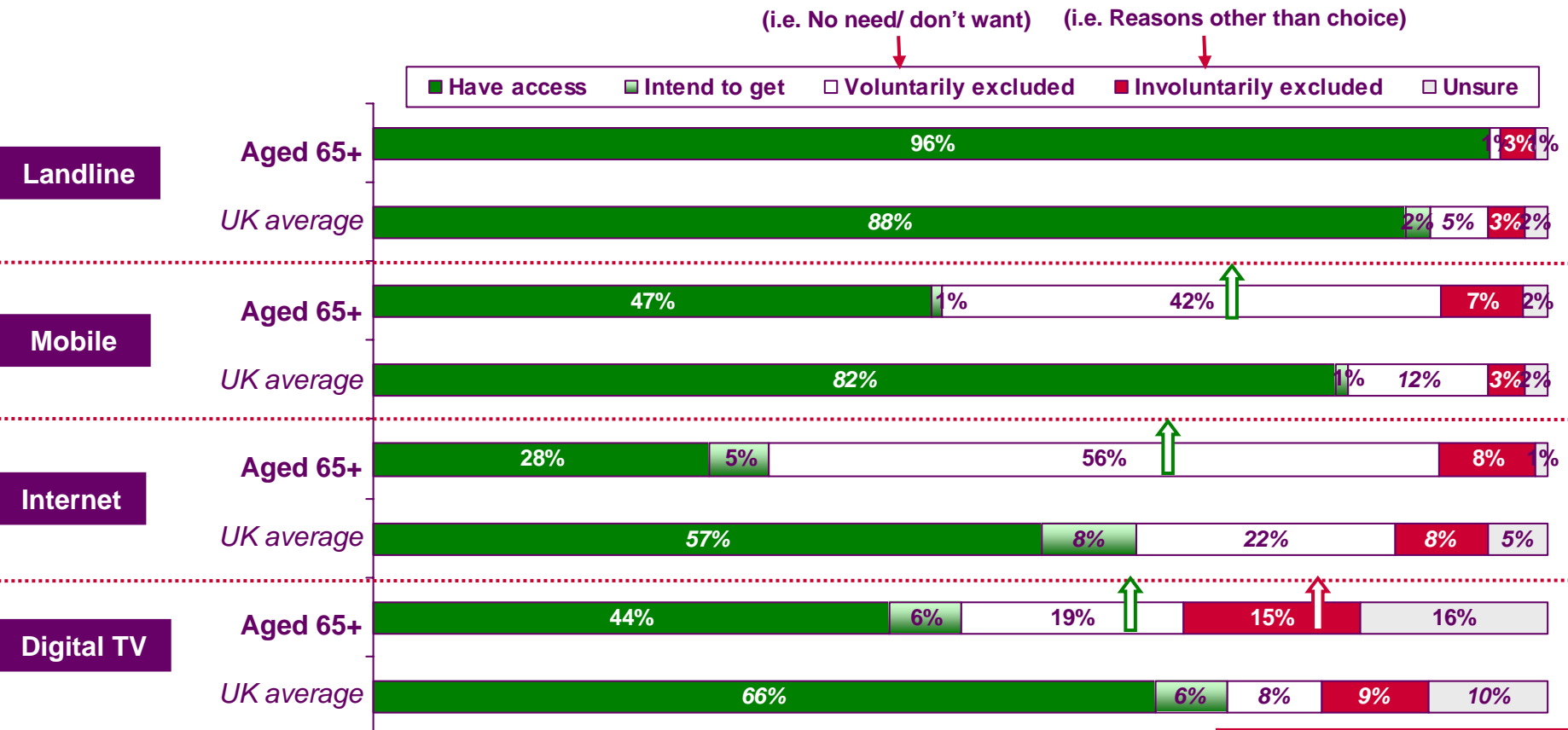


↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

- For each of the four communications technologies, involuntary exclusion is principally due to affordability (i.e. monthly charges, usage charges, cost of equipment)
- Lower ownership levels see older people significantly more likely than the UK average to be voluntarily excluded for mobile phones, internet and digital TV – although older people are also more likely to be involuntarily excluded for digital TV

Ownership

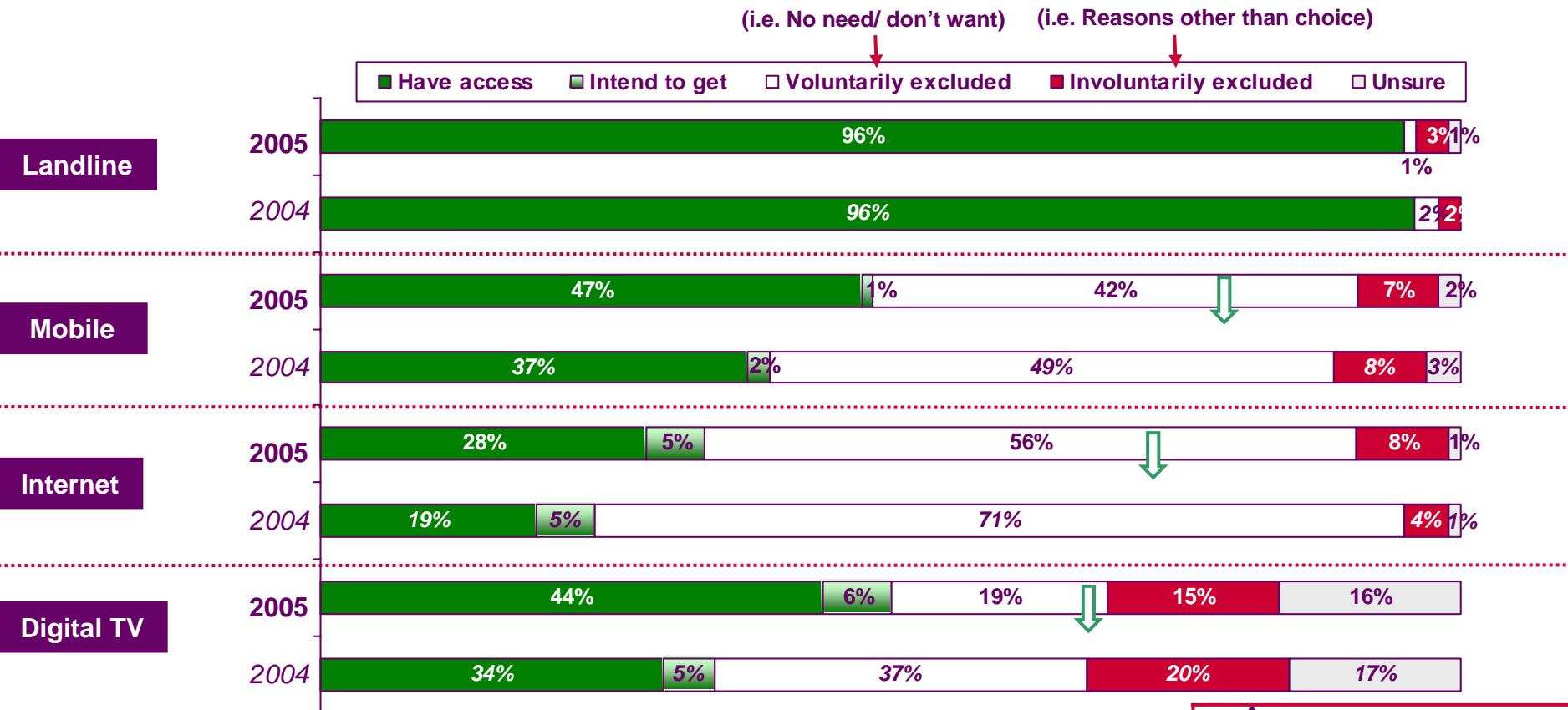


↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents aged 65 and over (463) and UK overall (2,689)

- Compared to 2004 mobile phone, internet and digital TV see a significant drop in the levels of voluntary exclusion for older people
- Digital TV remains the service with the highest levels of involuntary exclusion amongst older people, and also the highest proportion unsure whether they will get the service or not – possibly related to lower than average understanding of what digital TV is
- Involuntary exclusion is higher amongst older people in low income households for each of the services

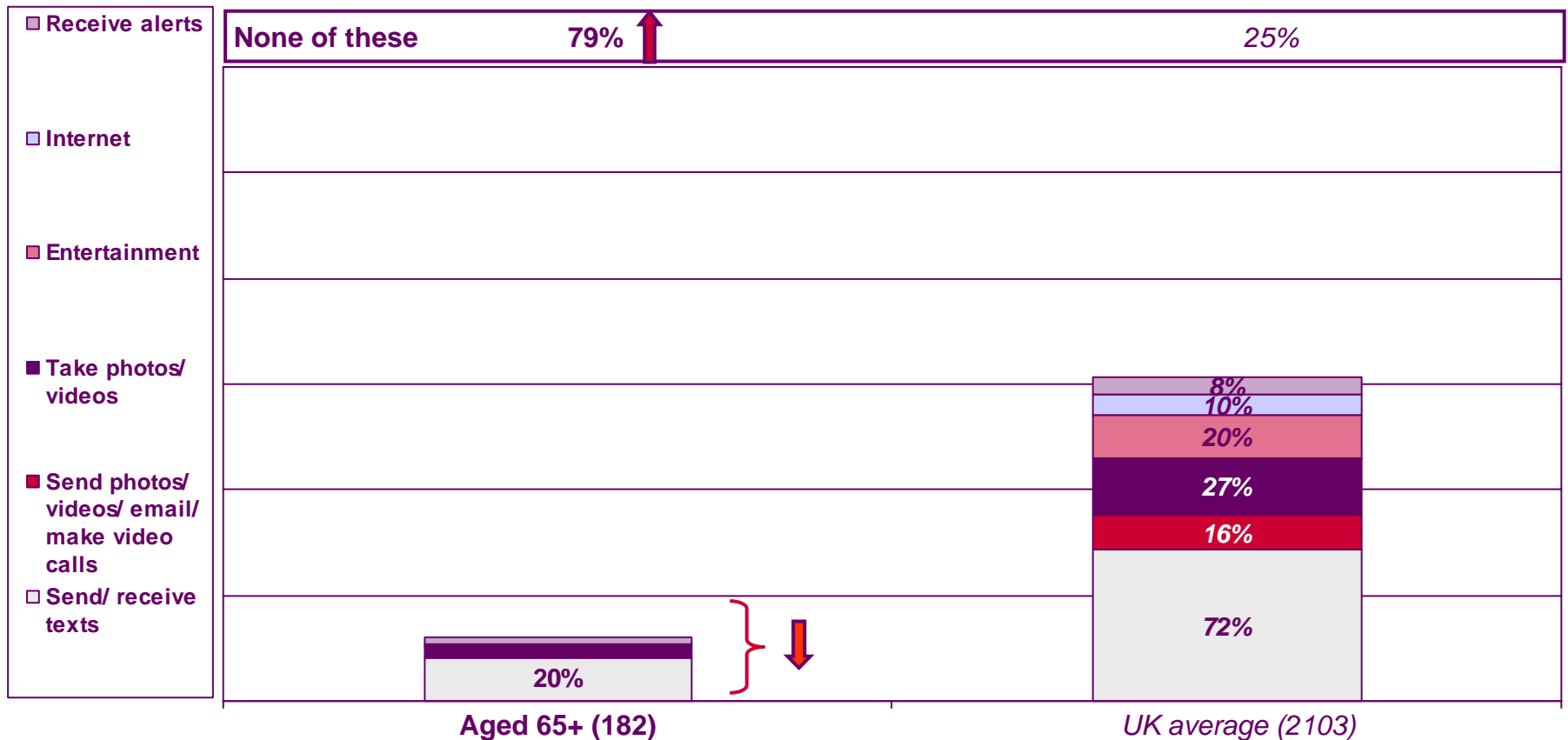
Ownership



Base : All respondents aged 65 and over 2005 (463) and 2004 (352)

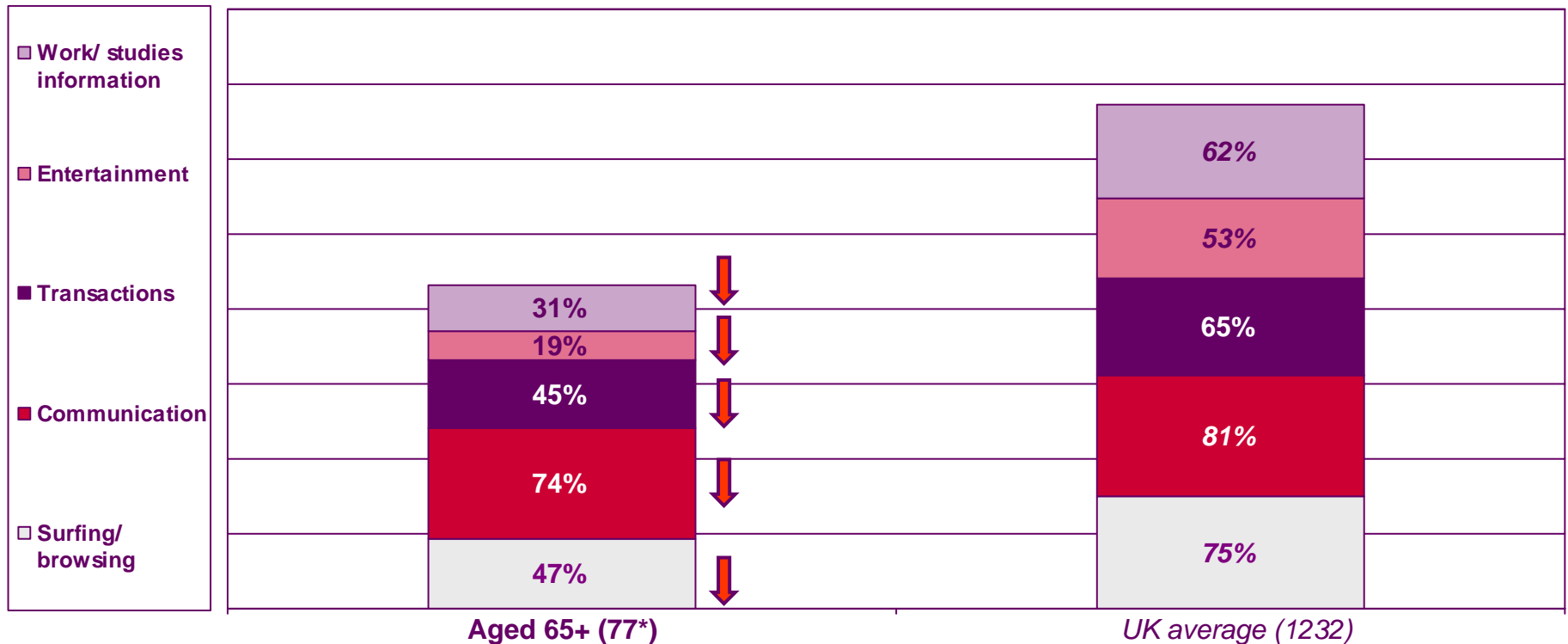
Indicates significantly lower or higher than 2004 Aged 65+

- Amongst older people a minority of mobile phone owners use their phone on a weekly basis for any of the uses shown - including sending and receiving text messages - with four in five older mobile phone owners not making **any** of these uses on a weekly basis



↑ Indicates significantly lower or higher than 2005 UK average

- Amongst older people, those with internet access at home make a narrower use of the internet compared to the UK average, with lower use of the internet for each of the types of uses shown – most notably surfing/ browsing, entertainment (e.g. downloading, games, radio) and finding/ downloading information for work/ studies.
- Whilst the gap between older people and all adults for using the internet for communication (e.g. email, Instant Messaging) is significant, compared to the other types of uses the level are much closer to the UK average, with the next smallest gap relating to using the internet for transactions (e.g. banking, shopping online)

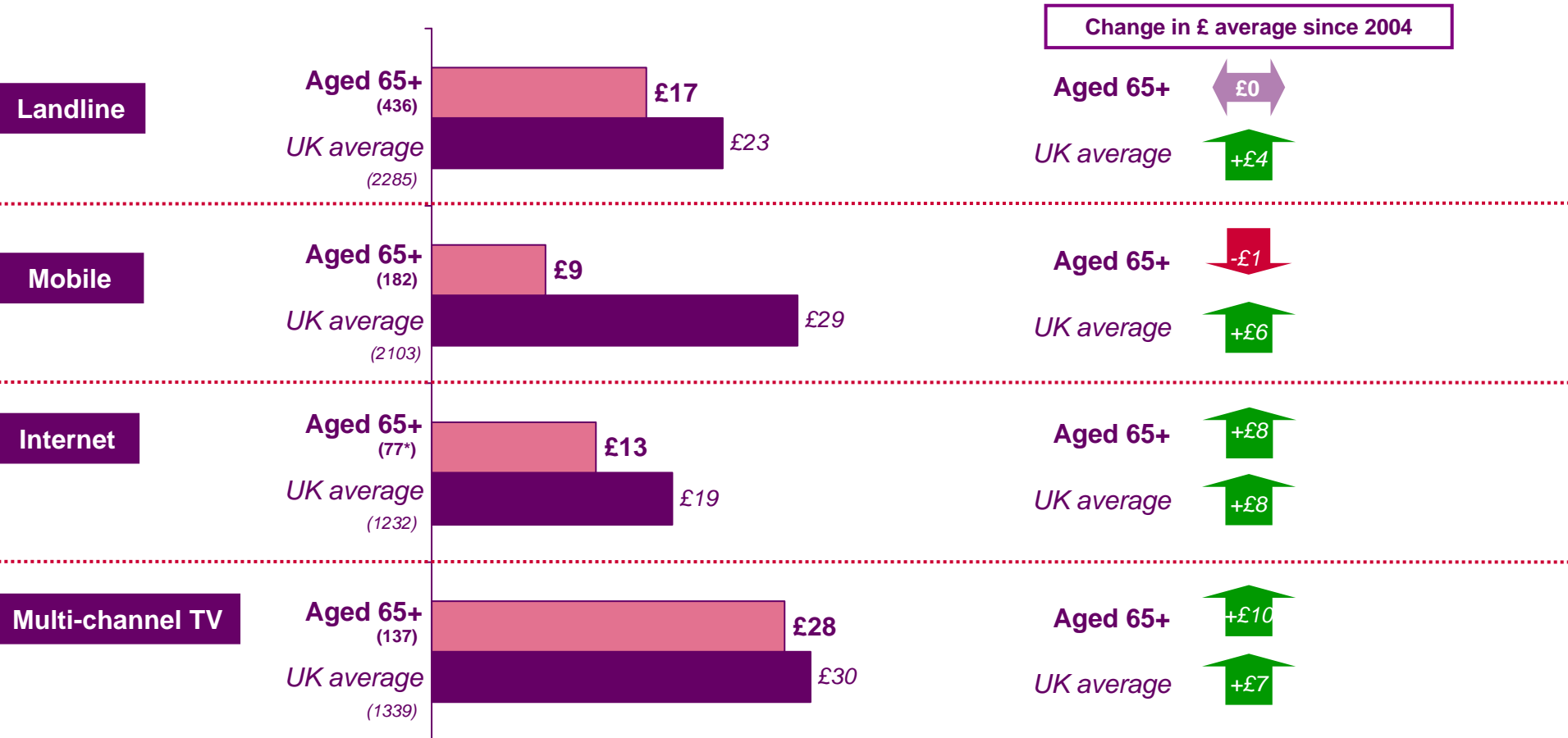


\*NB Low base size - treat as indicative only  
Base : All with internet access at home

↓ ↑ Indicates significantly lower or higher than 2005 UK average

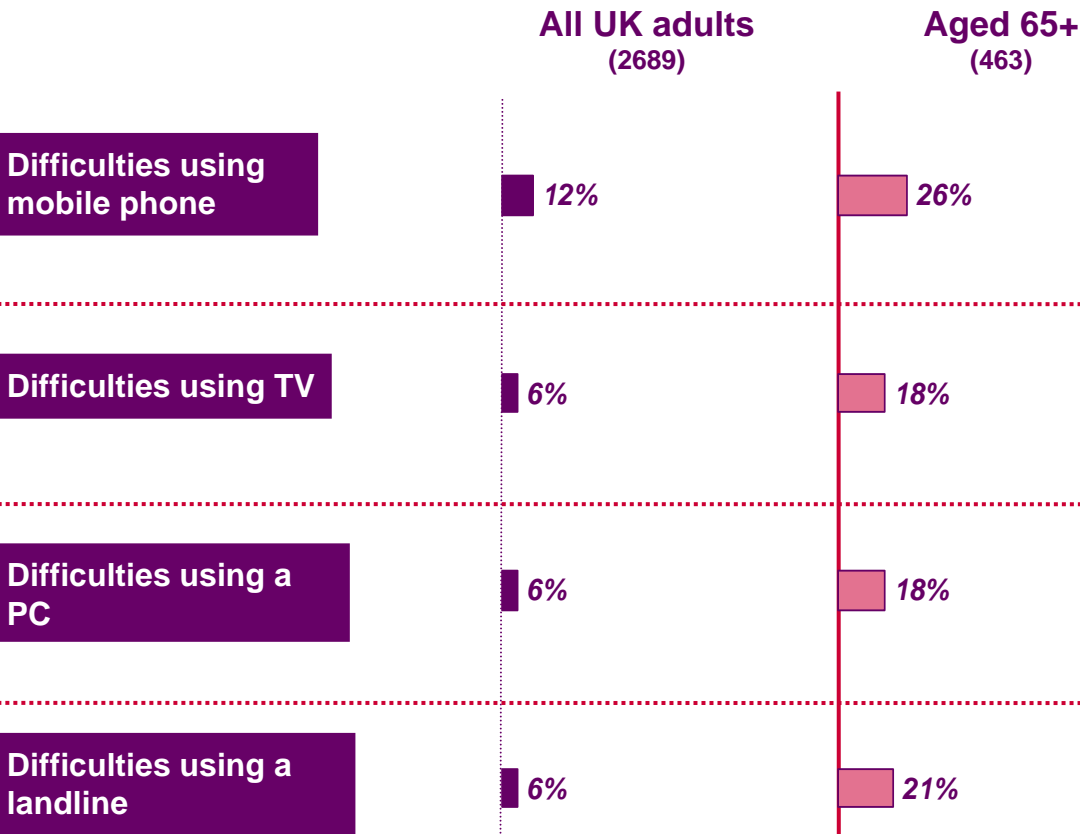
- Amongst older people with each type of service the average self-reported monthly spend is mostly lower than the UK average particularly for mobile, with the exception of the TV service

Usage



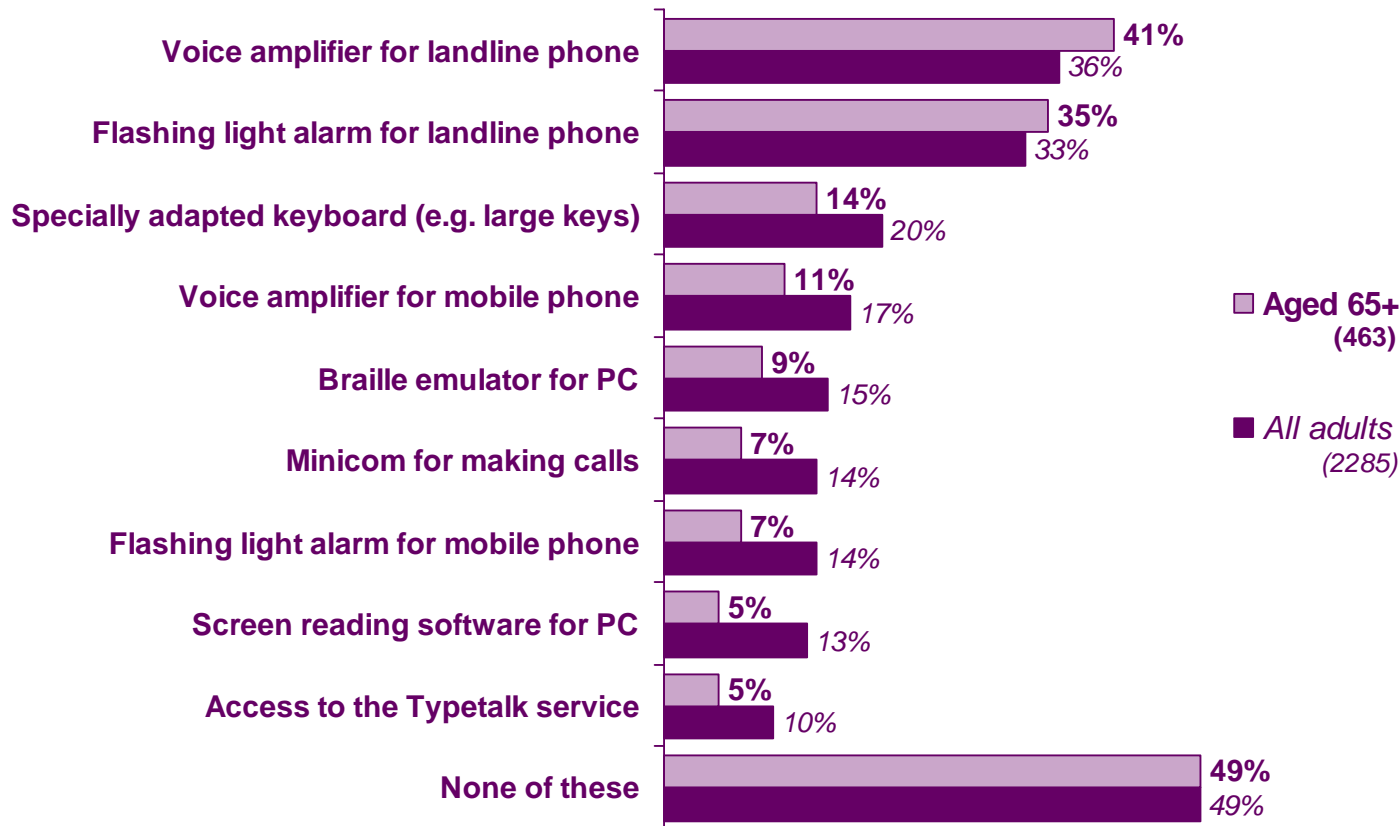
Base : Owners of each type of device/ service \*NB Low base size - treat as indicative only

- Amongst older people mobile phones appear to attract the highest levels of stated difficulties – reported by one in four older people, compared to around one in ten of all adults



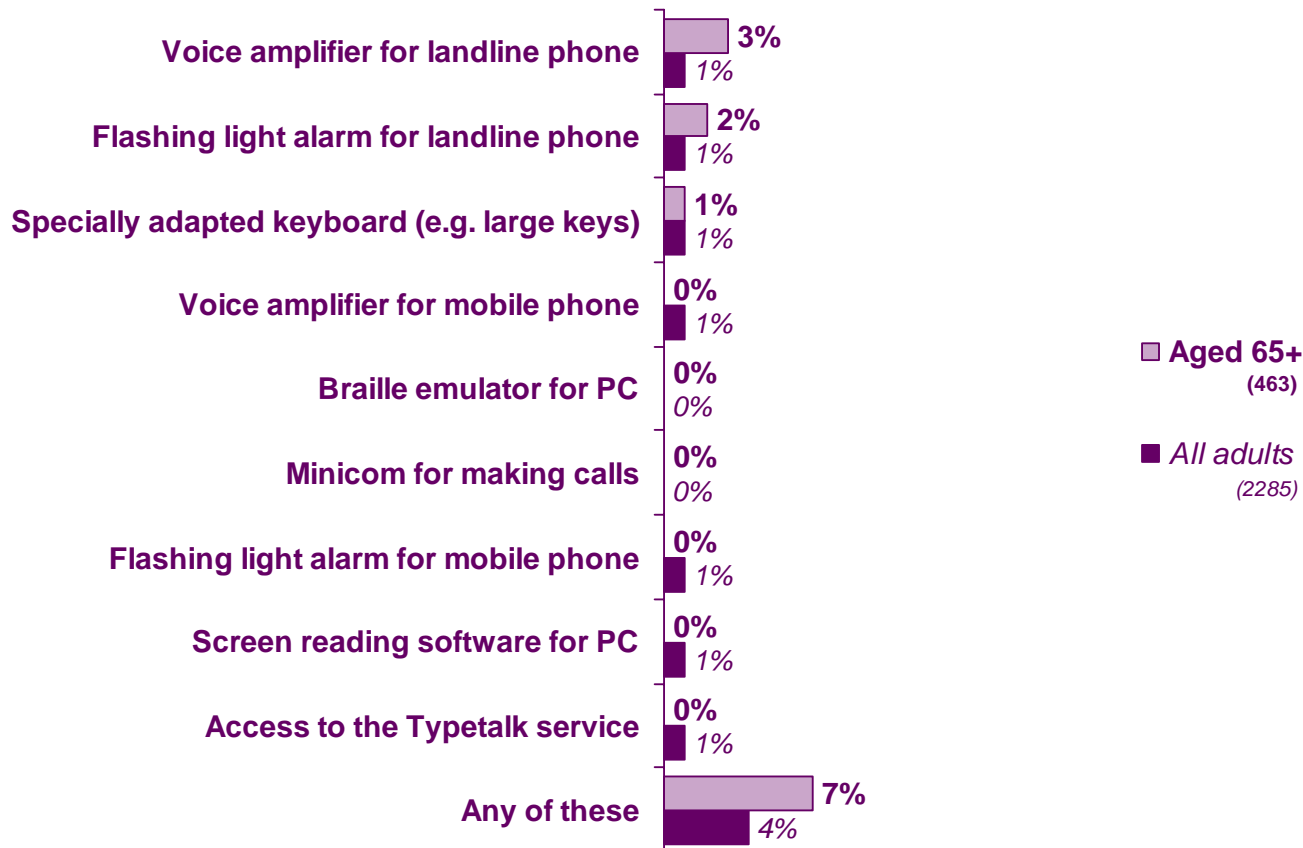
Base : All respondents aged 65 and over (463) and UK overall (2,689)

- Amongst older people, a minority are aware of the individual types of specialist equipment to assist with the use of landline phones, mobile phones and personal computers listed below. In total, half of all older people know of any of these types of equipment, which is equal to the UK average.
- Awareness is generally higher amongst older people regarding the equipment related to using landline phones, with lower awareness compared to all adults of the equipments related to using mobile phones and PCs



Base : All respondents aged 65 and over (463) and UK overall (2,689)

- Fewer than one in ten of all older people with a disability own any of the individual types of specialist equipment to assist with the use of landline phones, mobile phones and personal computers.



**Landline (297)**

- 33% have any concerns or worries (30% for UK)
- 17% costs
- 13% privacy (unsolicited calls)

Higher level of reported concerns amongst those with any disability

Increased from 18% with any concerns or worries in 2004

**Mobile phone (182)**

- 19% have any concerns or worries (31% for UK)
- 10% costs
- 3% choice/ access/ coverage
- 3% health issues

Base too low to report on differences

No real change from 20% with any concerns or worries in 2004

**Internet (77\*)**

- 28% have any concerns or worries (41% for UK)
- 15% spam/ pop-ups/ viruses/ control
- 8% security

Base too low to report on differences

Increased from 16% with any concerns or worries in 2004

*\*NB Low base size - treat result with caution*

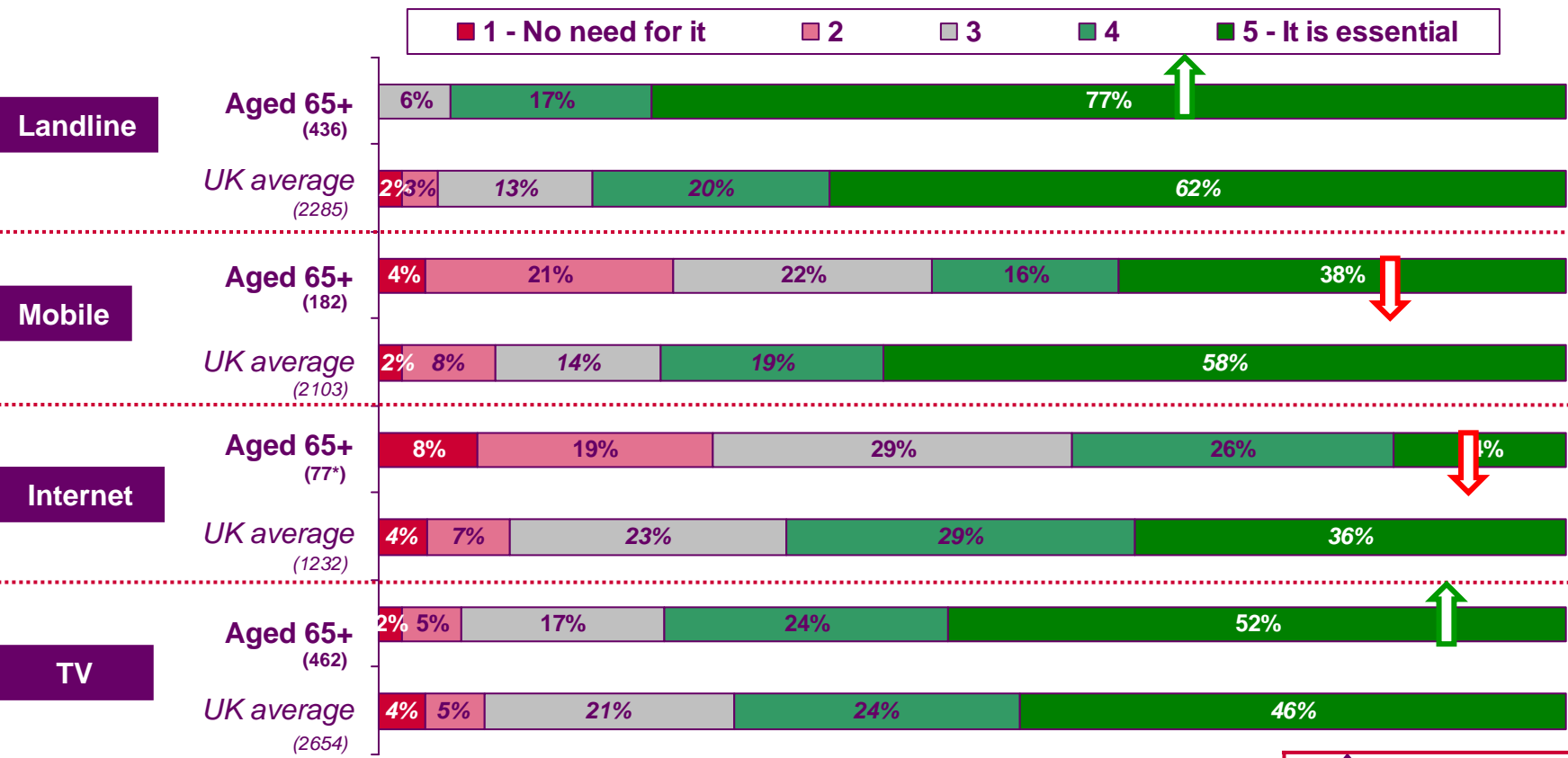
**Digital TV (200)**

- 16% have any concerns or worries (24% for UK)
- 9% costs
- 3% choice/ access
- 3% customer service

Little variation in level of reported concerns

No real change from 15% with any concerns or worries in 2004

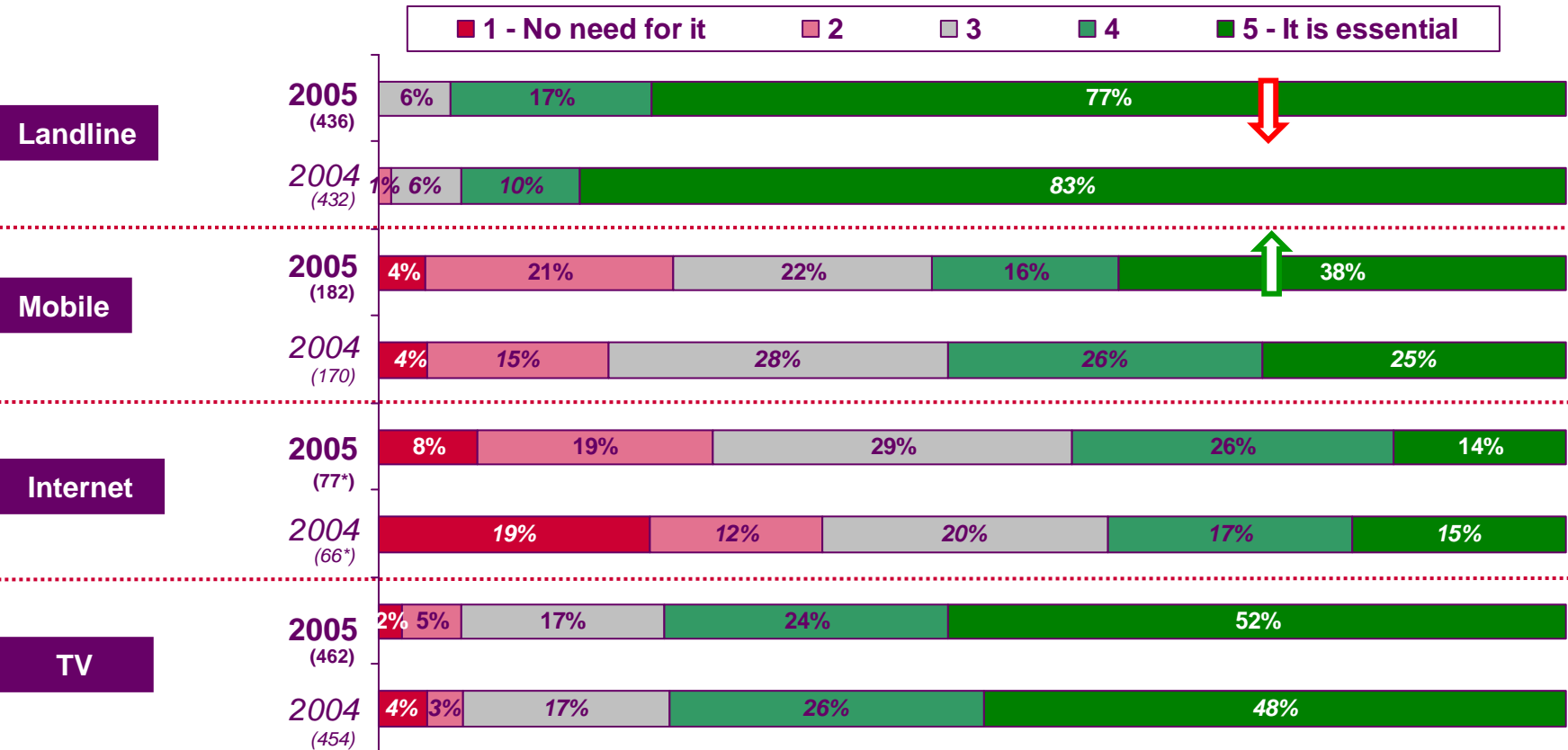
- Amongst older people who own each type of device/ service landline phones and the TV service are the most likely to be considered essential, with a minority of internet and mobile phone owners rating these service as being essential
- Compared to owners across the UK, older people are more likely to consider their landline and TV services to be essential and less likely to consider their mobile phone and internet services to be essential



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

↑ ↓ Indicates significantly lower or higher than 2005 UK average

- Compared to 2004 older people are less likely to consider their landline service to be essential, and more likely to consider their mobile phone service to be essential. No real changes in perceived importance are evident for the internet and TV services.
- Across the UK there has also been an increase in rating mobile phones as essential and a decrease in rating landline phones as essential, which is mirrored to an extent amongst older people.



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

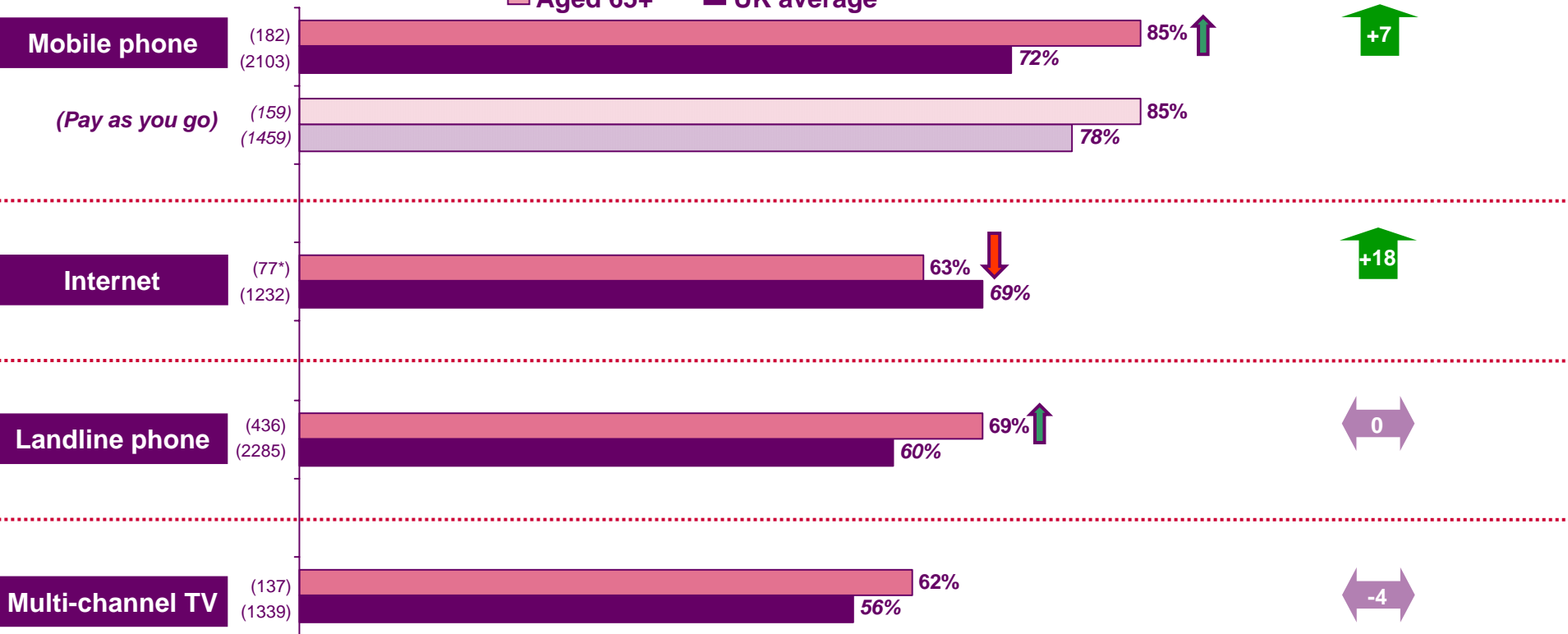
↓ ↑ Indicates significantly lower or higher than 2004 Aged 65+

- The mobile and landline phone services are most likely to be rated as providing good value by owners of each type of device/ service amongst older people, both telephony services attracting higher ratings from older people than the UK average
- By contrast, internet users are less likely to rate the service as providing good value than the average for all users

% owners rating each as 'good value'

Change in % since 2004 for aged 65+

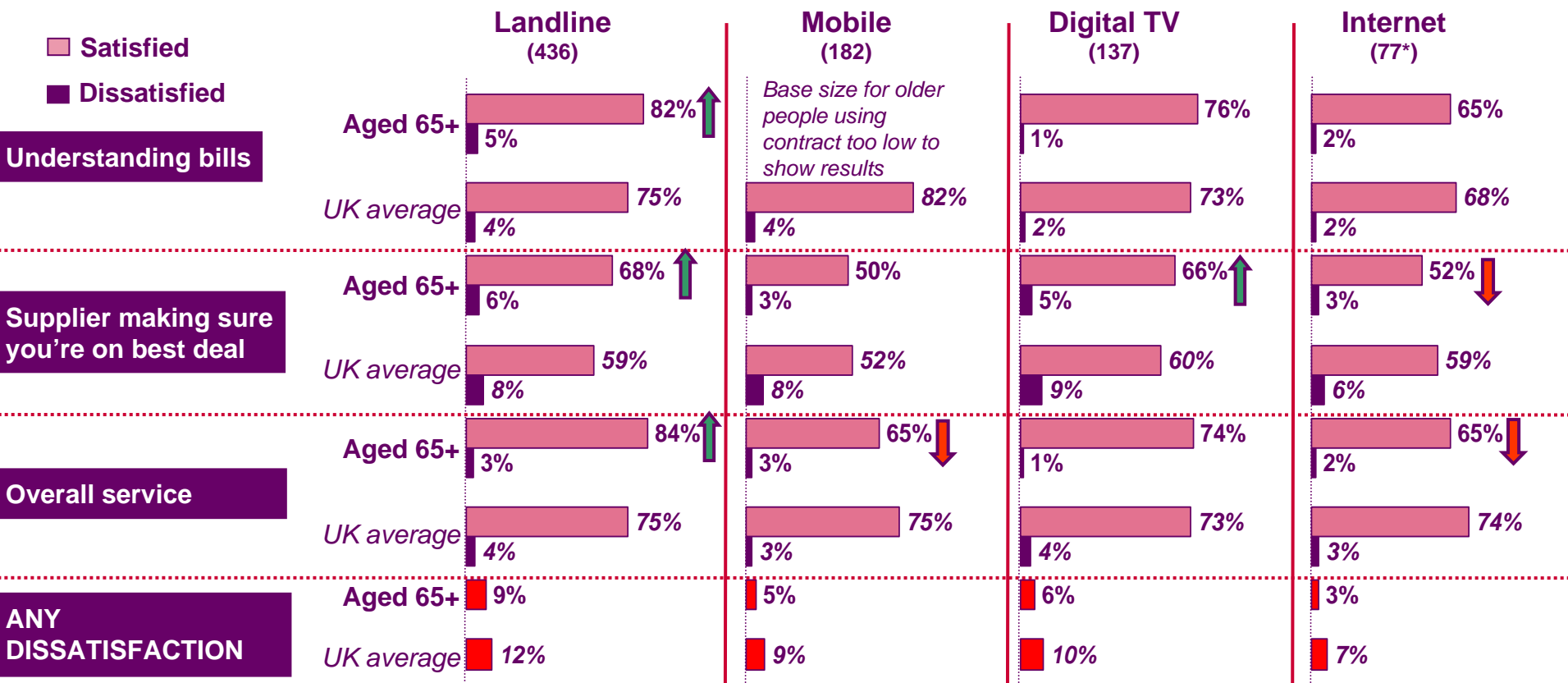
■ Aged 65+ ■ UK average



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

↑ ↓ Indicates significantly lower or higher than 2005 UK average

- Amongst older people who own each type of service/ device satisfaction with the overall service provided is highest for landline and lowest for mobile phone and internet services. For both of these less well rated services, older people are more likely to give a neutral or 'don't know' response, and so levels of dissatisfaction are not higher as a result.
- All satisfaction ratings for the landline service exceed the UK average.



Base size for older people using contract too low to show results

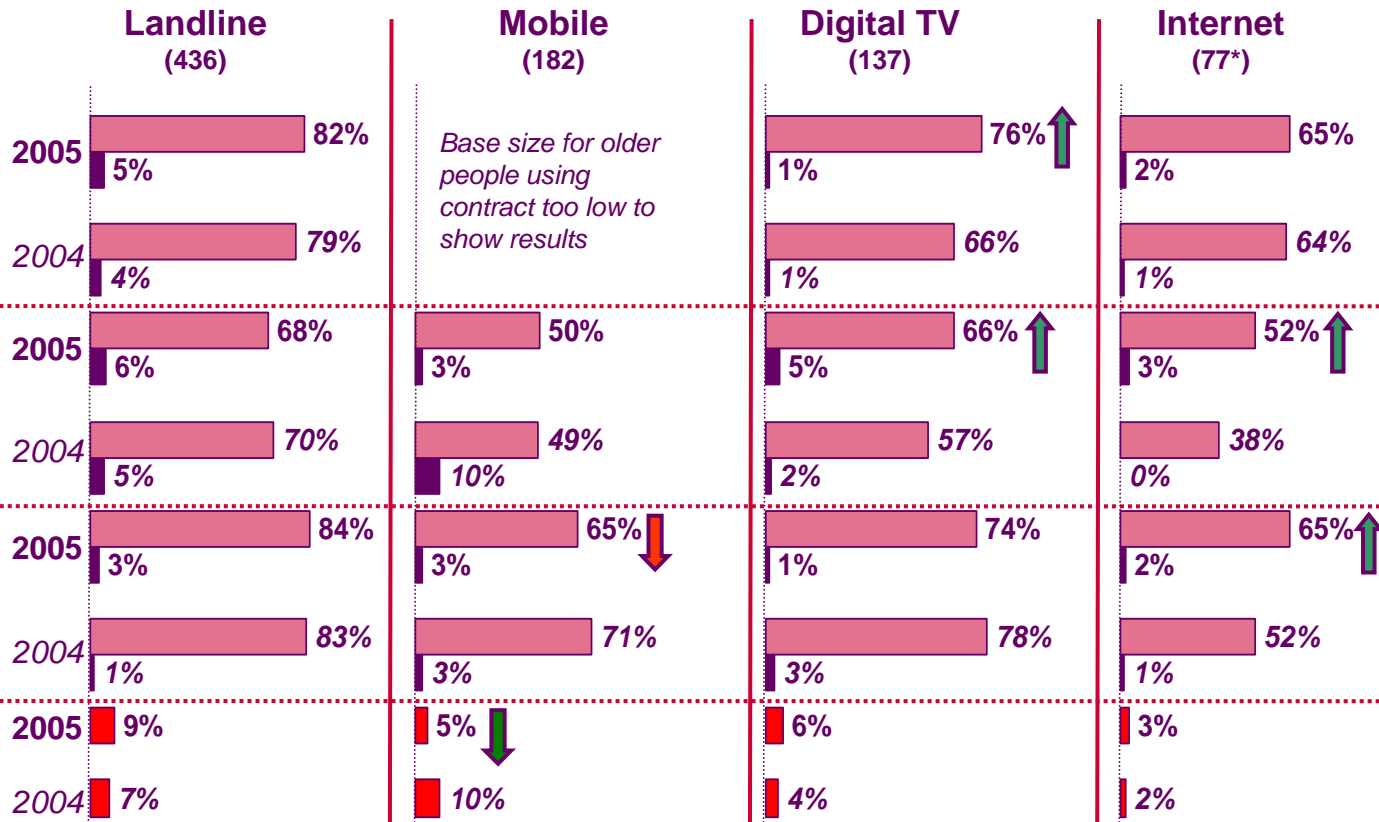
↑ Indicates significantly higher than 2005 UK average  
↓ Indicates significantly lower than 2005 UK average

- Amongst older people there are few changes since 2004 in terms of satisfaction with services and suppliers. Internet and digital TV services see more increases in satisfaction with aspects of service than landline and mobile phone services.
- Whilst ‘...making sure you are on the best of their deals for you’ remains the lowest rated aspect, satisfaction has improved for TV and internet services

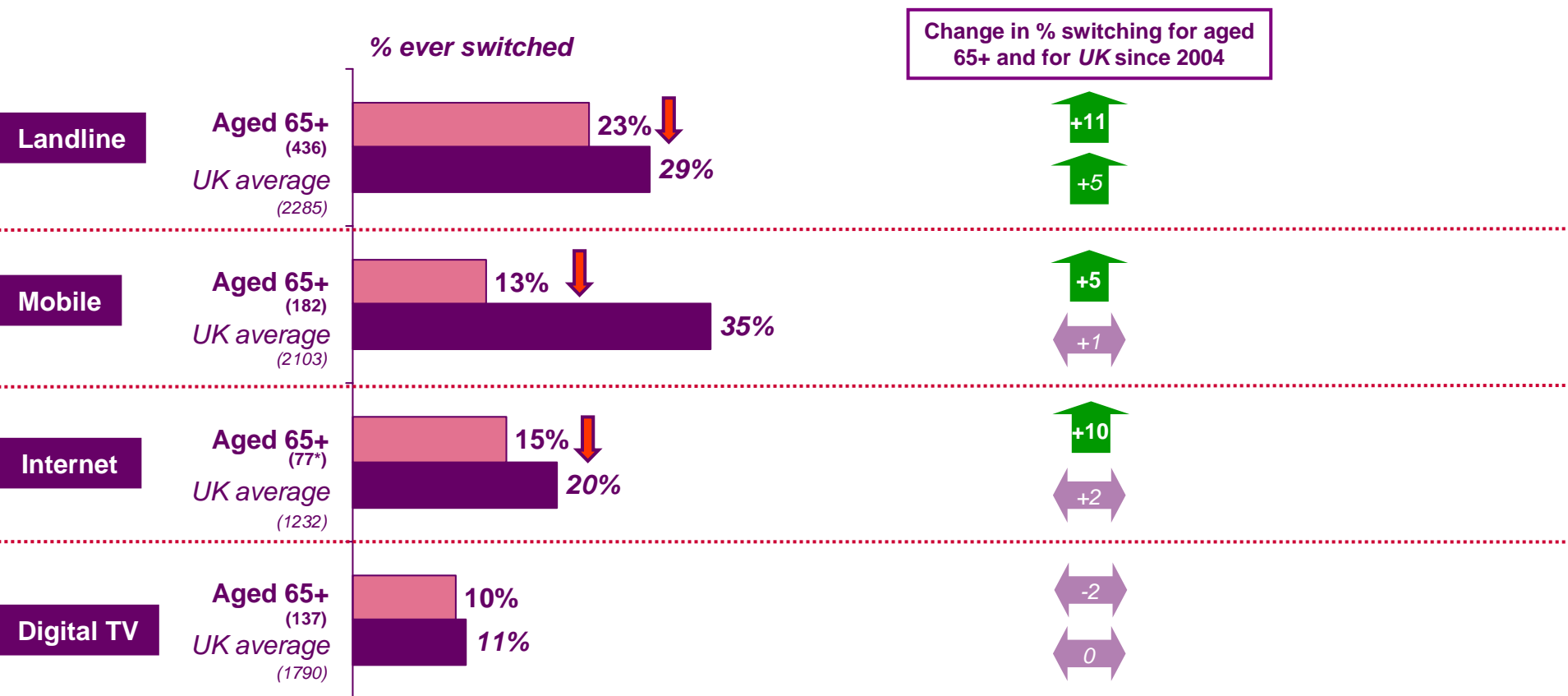
Attitudes

■ Satisfied  
■ Dissatisfied

Understanding bills



- Older people are more likely to have ever switched suppliers for their landline phone service than other communications services, with the incidence of having ever changed the company used for the landline service showing an increase since 2004
- Experience of switching suppliers for mobile phones in particular and the internet to a lesser extent is significantly below the UK average, although both again see an increase since 2004.

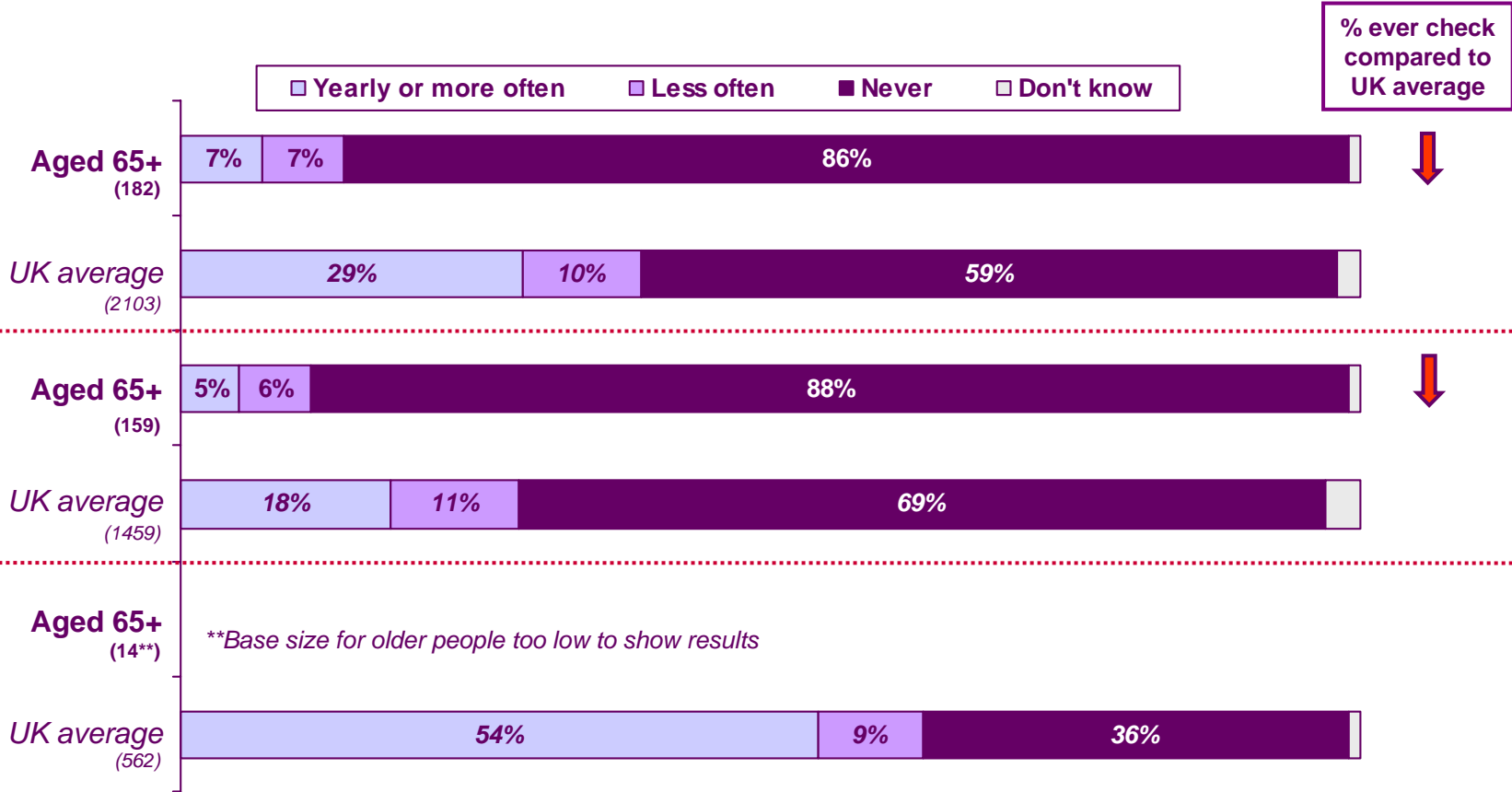


\*NB Low base size - treat as indicative only  
Base: Owners of each type of device/ service

↑ ↓ Indicates significantly lower or higher than 2005 UK average

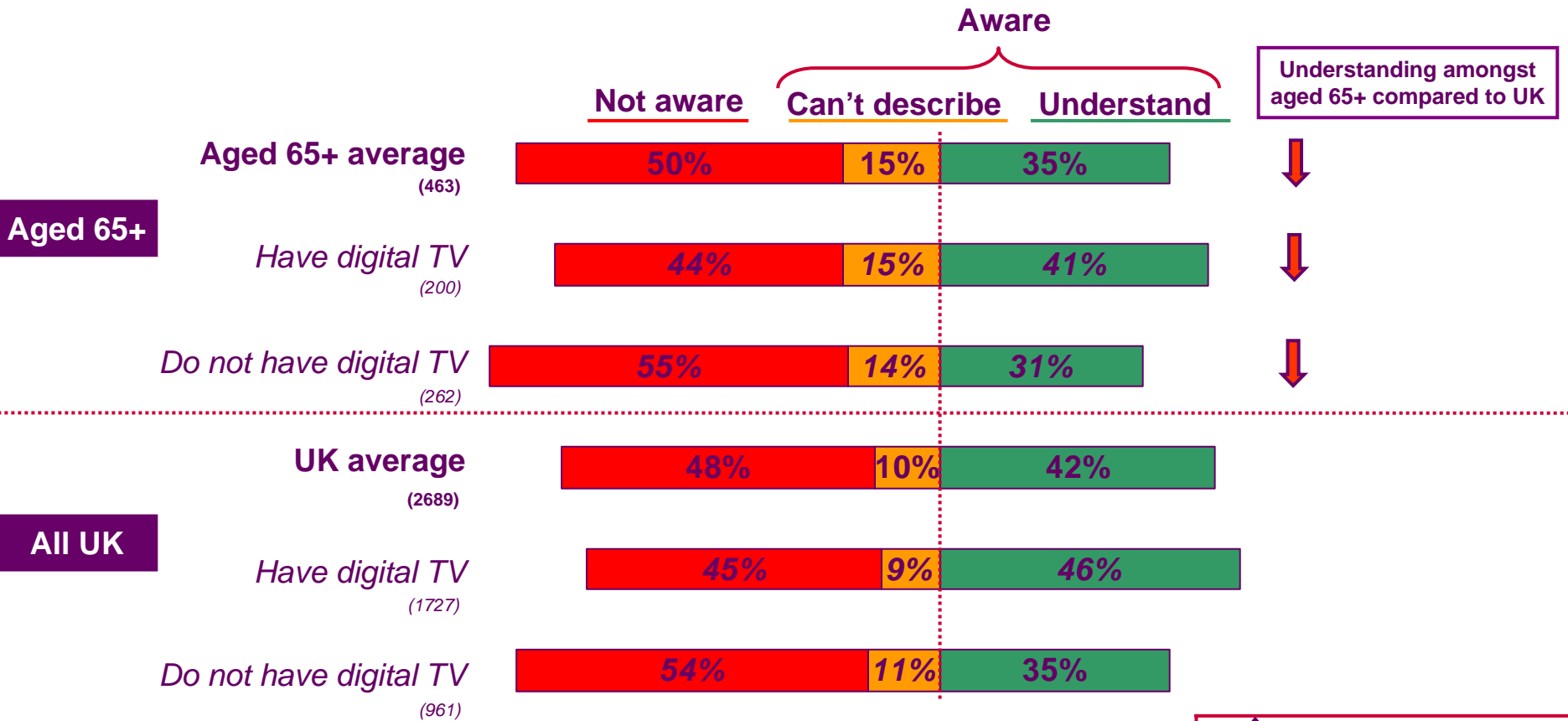
Usage

- A minority of older people with a mobile phone ever check whether they are on the best tariff or deal, with this being significantly less common than for the UK overall



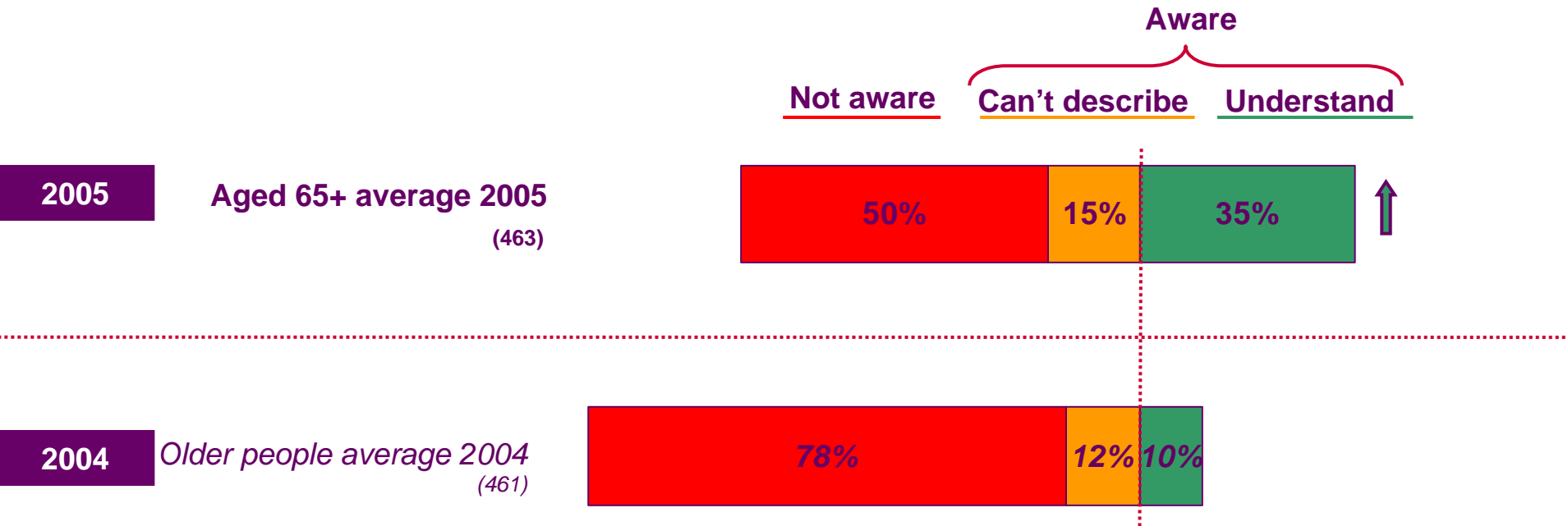
↓ ↑ Indicates significantly lower or higher than 2005 UK average

- Around one in three older people have heard the term digital switchover and are able to describe what the term refers to ('Understand'), with this measure significantly below the UK average
- Amongst older people, as with the UK overall, a higher proportion of those with digital TV are aware of digital switchover compared to those without



↓ ↑ Indicates significantly lower or higher than 2005 UK average

- Understanding of the term digital switchover has increased significantly amongst older people compared to 2004; rising by 25% to account for 35% of all older people
- Understanding is lower amongst older people in low income households and females



↓ ↑ Indicates significantly lower or higher than 2004 Aged 65+