



Ofcom Consumer Panel Research Quantitative Research Findings

Focus on rural and dense urban areas

June 2006








Report outline

- This report compares the findings for residential consumers living in rural areas with those living in dense urban areas and residential consumers in the **UK overall**
 - measures for the 2004 survey are also shown for comparison
 - rural and dense urban areas defined through Business Geographics Urbanity Indicator, as determined by population size and proximity to urban areas
- Differences shown of $\pm 6\%$ for rural areas and $+5\%$ for dense urban areas (where based on all respondents) are statistically significant
- Where findings for those in rural or dense urban areas 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 those in rural or dense urban areas  
- 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 
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'



Knowledge

- Lower understanding of the terms broadband and DAB for those in dense urban areas compared to the UK average and rural areas, but increase since 2004 in understanding of broadband, digital TV and 3G for both
- Overall awareness (aware of term or aware of service capability) for each of the services matches the UK average, except for higher overall awareness of DAB for those in dense urban areas
- Both area types match the UK average in terms of keeping informed of developments
- Friends and family are the most popular source of advice for both rural and dense urban areas, but those in rural areas are less likely to use supplier/ stores and media sources and more likely to use online sources than the UK average. Those in dense urban areas are more likely to use media sources.
- Awareness of digital switchover is significantly above the UK average for rural areas and below for dense urban areas, but with a significant increase in awareness for both locations since 2004

Ownership

- Those in rural areas are more likely than UK average to have a mobile phone and internet access compared to the UK average, with no real difference to the UK average for those in dense urban areas.
- Levels of involuntary and voluntary exclusion do not differ from the UK average, other than lower levels of voluntary exclusion in rural areas for mobile phones due to higher ownership levels
- Increase since 2004 in ownership of digital TV and broadband access to the internet for both locations since 2004 with broadband ownership in rural areas now equal to the UK average.

Usage

- Use made of mobile phone slightly narrower than the UK average for those in rural areas and slightly broader for those in dense urban areas. Those in rural areas generally make fewer uses of the internet except for transactions, whilst the reverse is true for those in dense urban areas.

Attitudes

- Generally lower levels of concerns or worries regarding services amongst owners compared to the UK average for those in rural areas and higher for those in dense urban areas. Most services see an increase in nominations since 2004, however.
- Both locations see an increase in the perceived importance of the mobile phones since 2004, and a decrease for landlines
- Those in rural areas are generally less satisfied compared to the UK average, with increased dissatisfaction for the internet service. Satisfaction in dense urban areas mostly matches the UK, but has increased since 2004.

CONSUMER PANEL

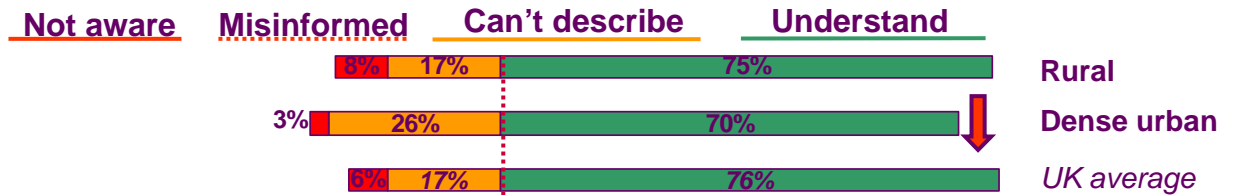
Awareness and understanding of communication terms - comparison to UK



- High awareness for digital TV and broadband, moderate for DAB digital radio and lower awareness of 3G and VoIP
- Awareness and understanding for those in rural areas do not differ from the UK average. For those in dense urban areas, understanding of broadband and DAB is lower than average due to higher levels aware of the term but unable to describe what it means

Knowledge

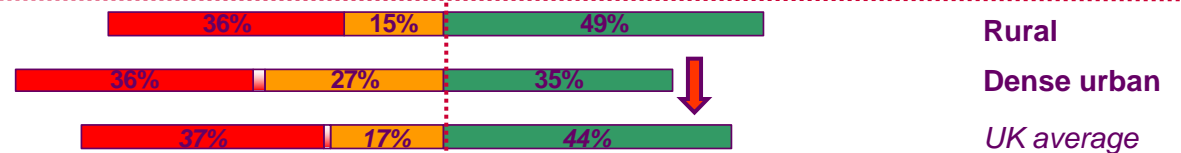
Broadband



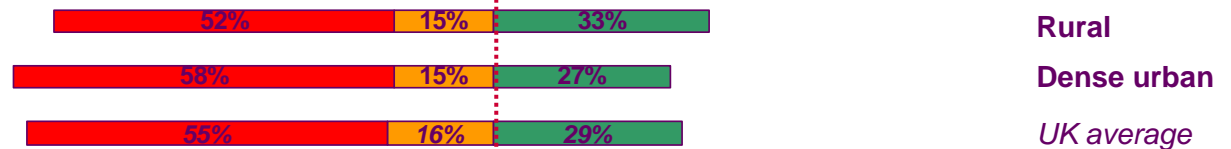
Digital TV



DAB digital radio



3G



VoIP (Voice over Internet Protocol)



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents in rural areas (266), dense urban areas (462) and UK overall (2,689)

CONSUMER PANEL

Awareness and understanding of communication terms - change in rural areas since 2004

RURAL AND DENSE URBAN AREAS



- Significant increases amongst people in rural areas in understanding of the communications terms broadband and digital TV and an increase in awareness and understanding of 3G since 2004

Knowledge

Not aware Misinformed Can't describe Understand

Broadband



2005 ↑



2004

Digital TV



2005 ↑



2004

DAB digital radio

*NB 2004 term was Digital radio



2005*



2004

3G



2005 ↑



2004

VoIP (Voice over Internet Protocol)

*NB Introduced to survey in 2005



2005

↓ ↑ Indicates significantly lower or higher than 2004 rural areas

CONSUMER PANEL

Awareness and understanding of communication terms - change in dense urban areas since 2004

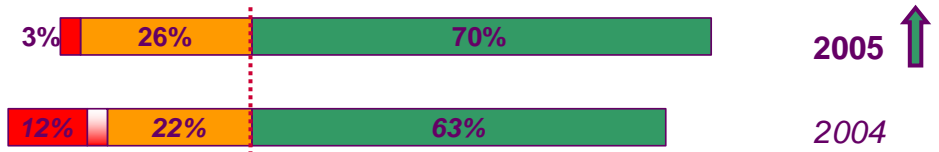


- Significant increases amongst people in dense urban areas in awareness and understanding of the communications terms broadband, digital TV and 3G since 2004

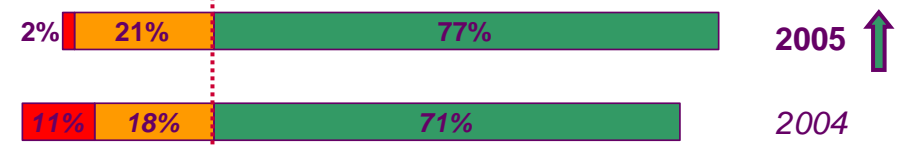
Knowledge

Not aware Misinformation Can't describe Understand

Broadband

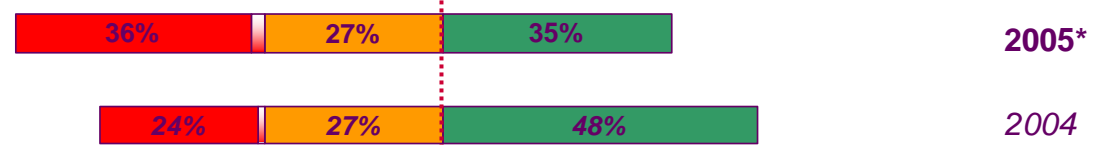


Digital TV

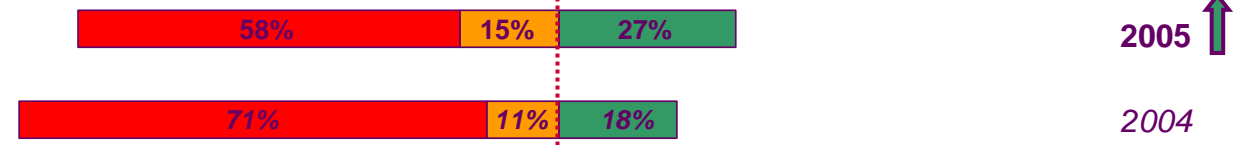


DAB digital radio

*NB 2004 term was Digital radio



3G



VoIP (Voice over Internet Protocol)

*NB Introduced to survey in 2005



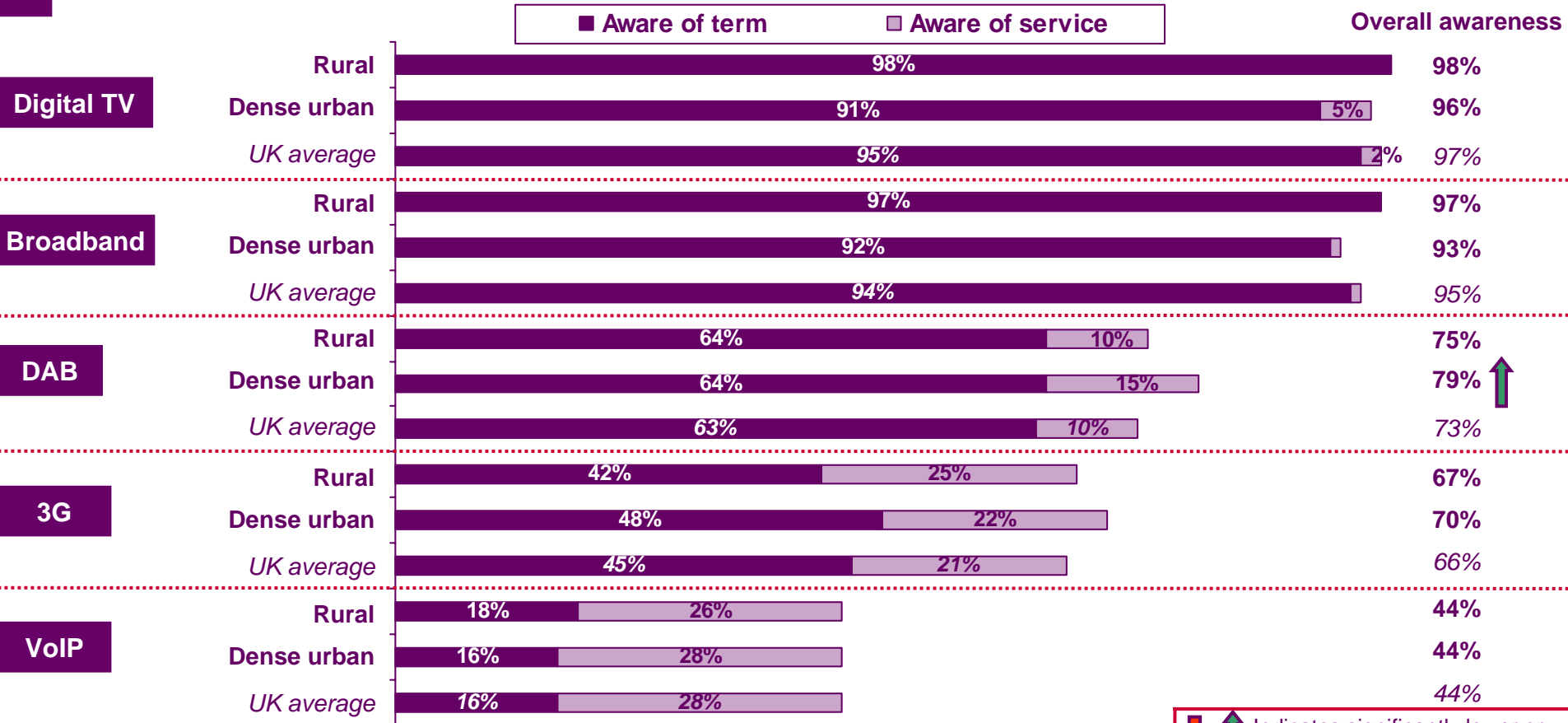
↓ ↑ Indicates significantly lower or higher than 2004 dense urban areas

Base : All respondents in dense urban areas (462) and 2004 (687)



- A significant proportion of people in rural and dense urban areas are aware of DAB digital radio, 3G and VoIP once they are read a description of what these services provide.
- Levels of overall awareness do not differ from the UK average, with the exception of higher overall awareness of DAB digital radio in dense urban areas.

Knowledge

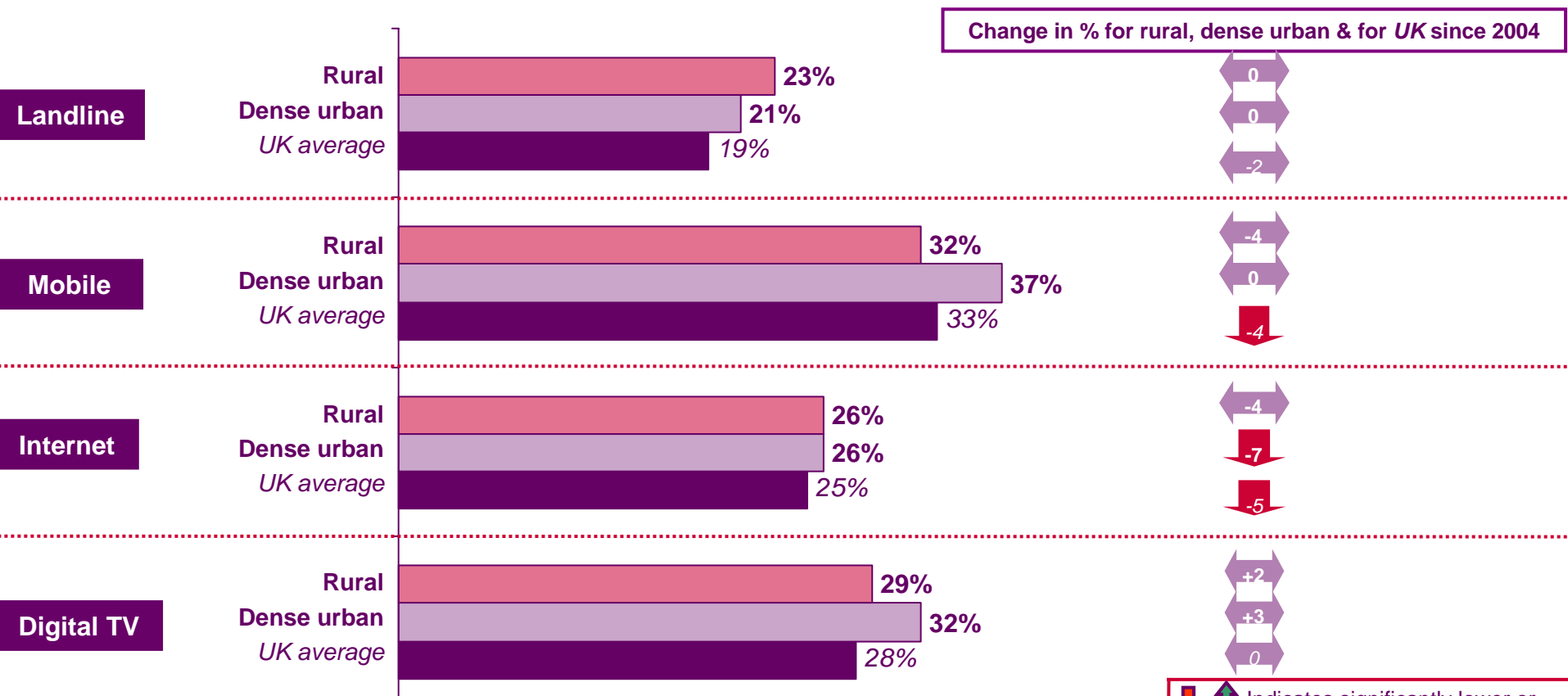


↑ ↓ Indicates significantly lower or higher than 2005 UK average

Base : All respondents in rural areas (266), dense urban areas (462) and UK overall (2,689)



- People in rural and dense urban areas are most likely to keep themselves informed about developments regarding mobile phones and digital TV, with those in dense urban areas significantly more likely to keep informed about mobile phone services compared to those in rural areas. The extent of keeping informed does not differ from the UK average for either location.
- Compared to 2004 there has been just one change of significance – with people across the UK less likely to keep informed about the internet – driven by a fall amongst those in dense urban areas.



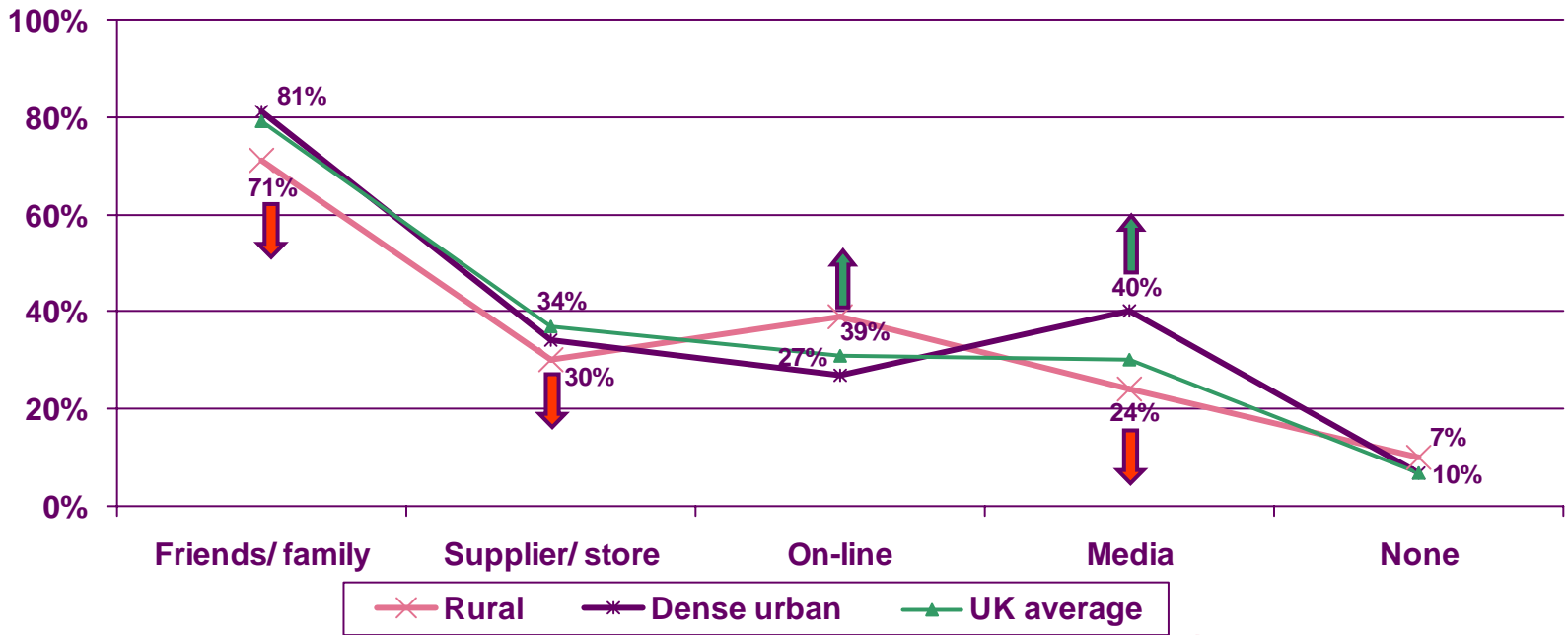
↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents in rural areas (266), dense urban areas (462) and UK overall (2,689)



- Friends and family are the most popular source of advice and information on communications sources for people in rural and dense urban areas, and see a significant increase in nominations since 2004 for those from dense urban areas, as do media sources (e.g. TV, radio, press). Those in rural areas see a significant increase in nominations for on-line sources. There has been a decline in nominations for suppliers/ stores for both locations.

	Friends/ family	Supplier/ store	On-line	Media	None
% Change since 2004 rural	0	-9	+19	-1	-2
% Change since 2004 dense urban	+18	-10	+4	+9	-1
% Change since 2004 UK	+10	-2	+9	-1	-1



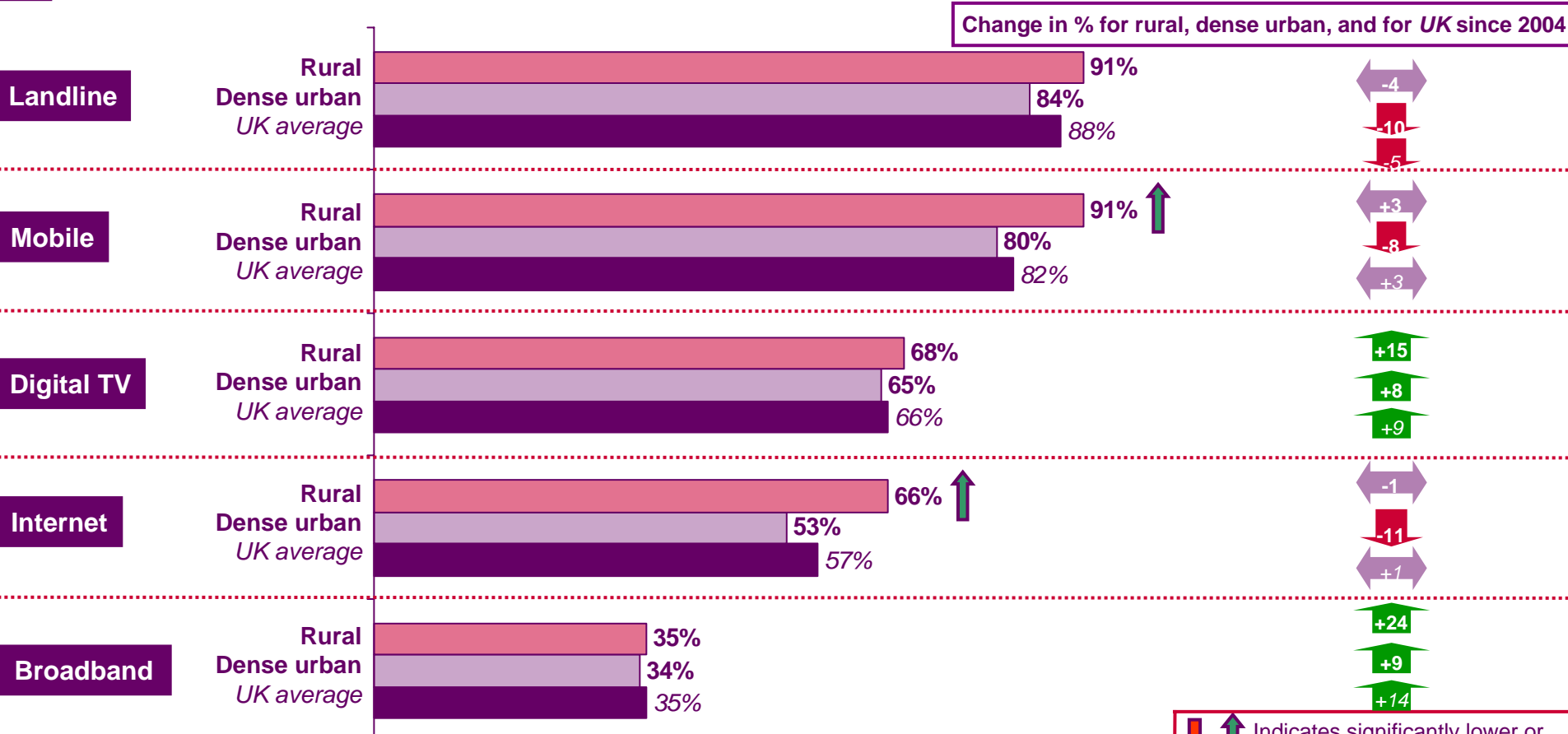
Significantly lower or higher than 2005 UK average

Base : All respondents in rural areas (266), dense urban areas (462) and UK overall (2,689)



- People in rural areas are significantly more likely to have a mobile phone and access to the internet compared to the UK average, with no significant differences to the UK average for those in dense urban areas.
- Both locations show an increase in ownership of digital TV and broadband internet access, as with the UK average. There are also declines in ownership of landline and mobile phones and internet access for those in dense urban areas.

Ownership



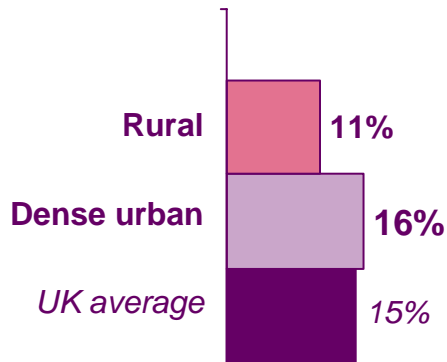
↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents in rural areas (266), dense urban areas (462) and UK overall (2,689)

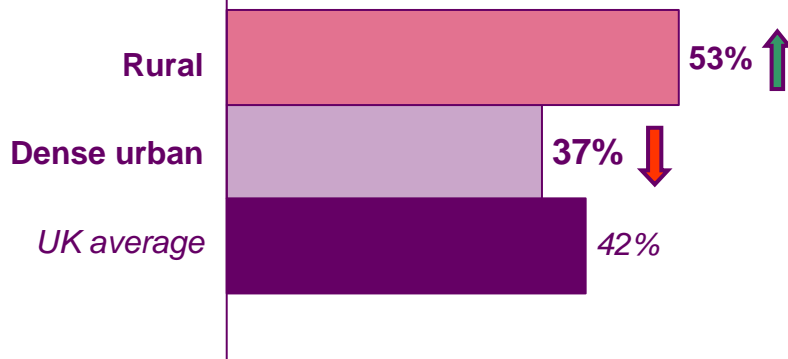


- Those in rural and dense urban areas do not differ from the UK average in respect of owning just one of the four communications technologies (landline, mobile phone, digital TV or the internet). However, comparing the two locations, those in dense urban areas are more likely than those in rural areas to own just one of the platforms.
- Owning all four of these types communications technology is, however, significantly more common amongst those in rural areas and significantly less common amongst those in dense urban areas, compared with the UK average

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 in rural areas (266), dense urban areas (462) and UK overall (2,689)



- Higher ownership levels for those in rural areas see generally lower levels of voluntary and involuntary exclusion compared to the UK average for mobile phones. Those in dense urban areas show findings which are close to the UK average for each of the platforms.
- Comparing the two are types shows that involuntary exclusion for the internet is significantly higher in dense urban compared to rural areas.

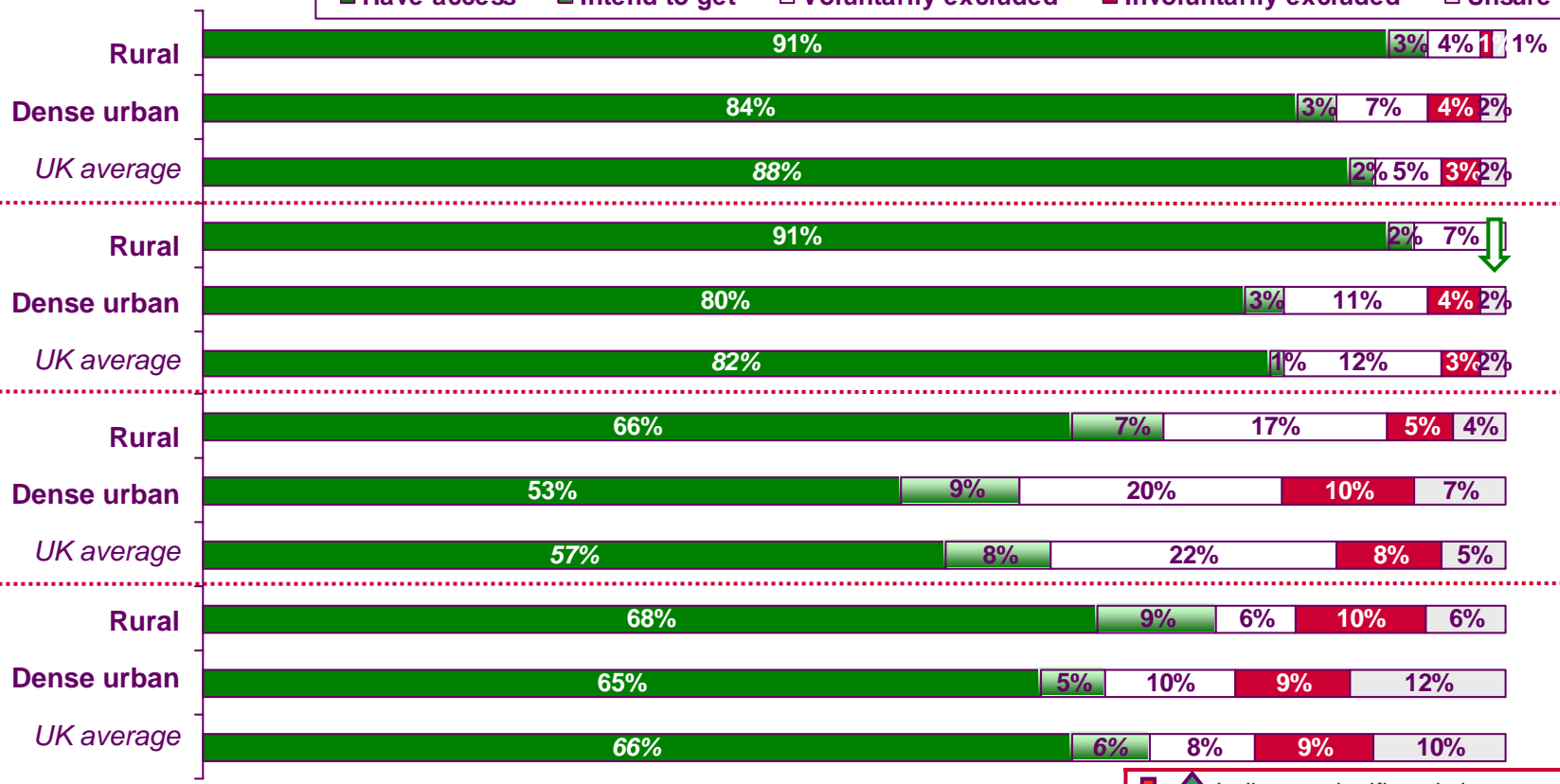
Ownership

Landline

Mobile

Internet

Digital TV



↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents in rural areas (266), dense urban areas (462) and UK overall (2,689)



- Compared to 2004 increased ownership of mobile phone and digital TV sees a significant drop in the levels of voluntary exclusion for people in rural areas
- The level of involuntary exclusion amongst people in rural areas has also decreased significantly or digital TV as a result of the 15% increase in ownership since 2004

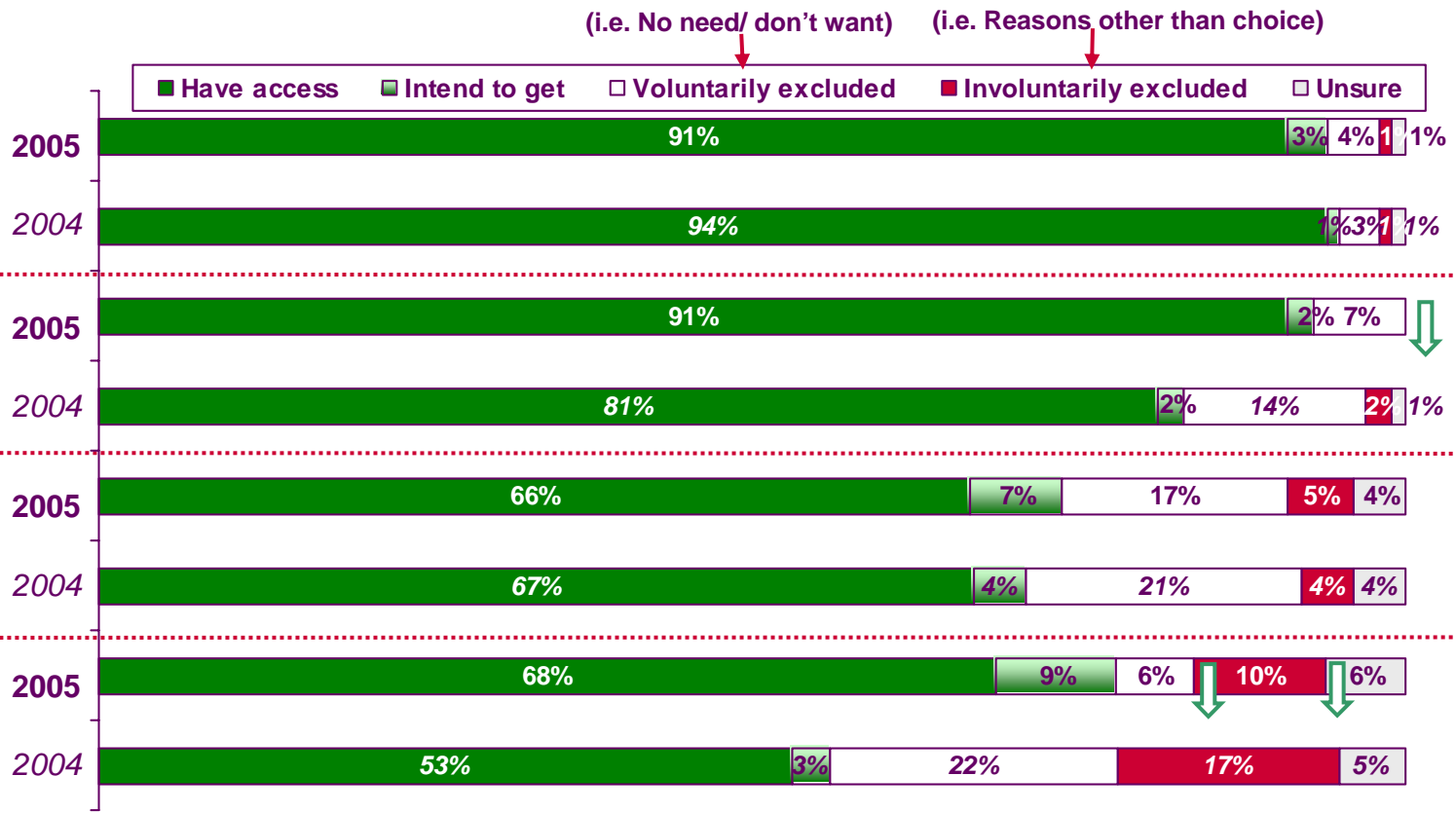
Ownership

Landline

Mobile

Internet

Digital TV



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

(i.e. Reasons other than choice)

■ Have access ■ Intend to get □ Voluntarily excluded ■ Involuntarily excluded □ Unsure

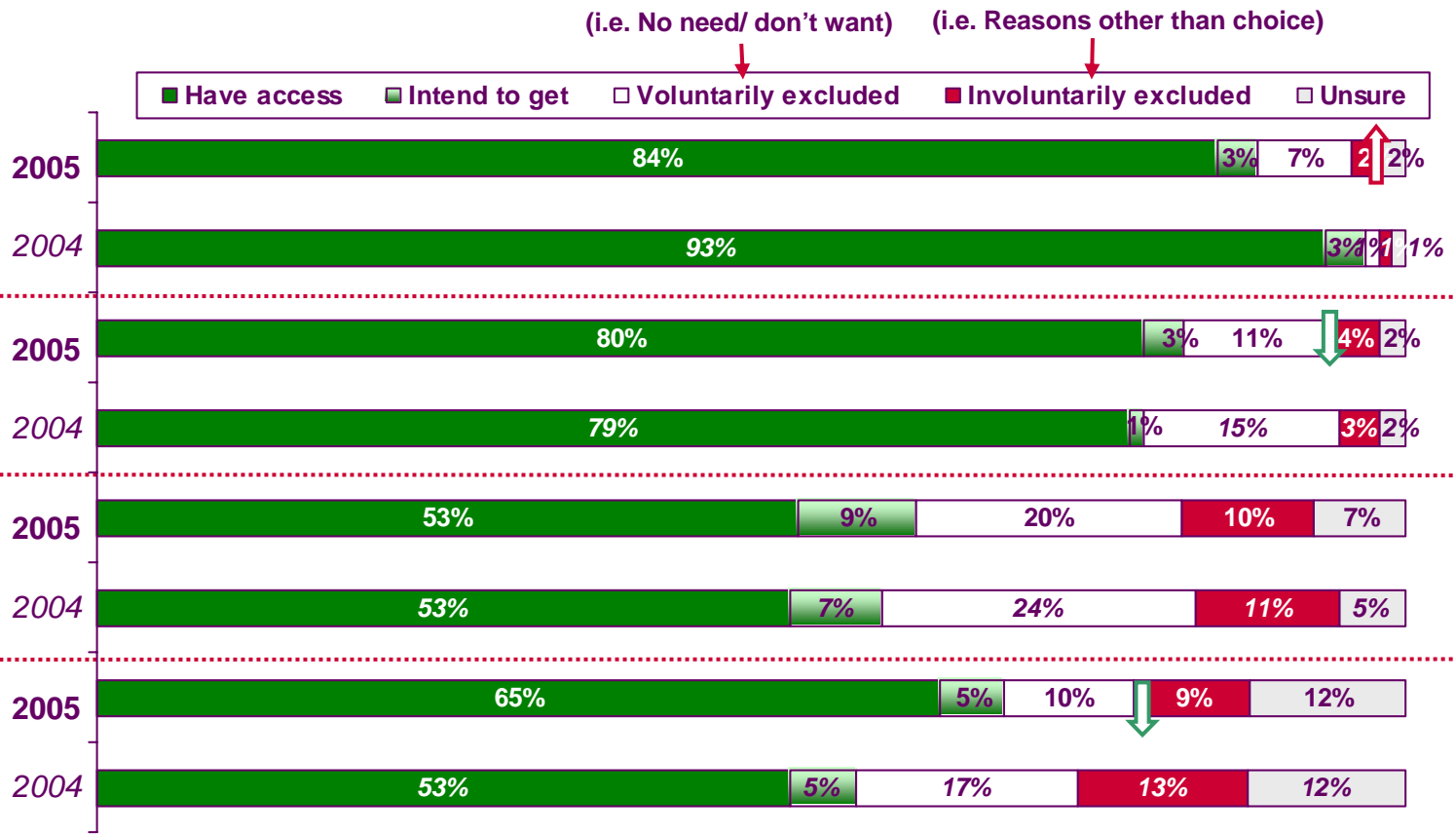
↓ ↑ Indicates significantly lower or higher than 2004 rural areas

Base : All respondents in rural areas (266), and 2004 (398)



- Compared to 2004 increased ownership of mobile phone and digital TV sees a significant drop in the levels of voluntary exclusion for people in dense urban areas
- The decrease in ownership of landlines, however, sees an increase in voluntary exclusion for those in dense urban areas

Ownership

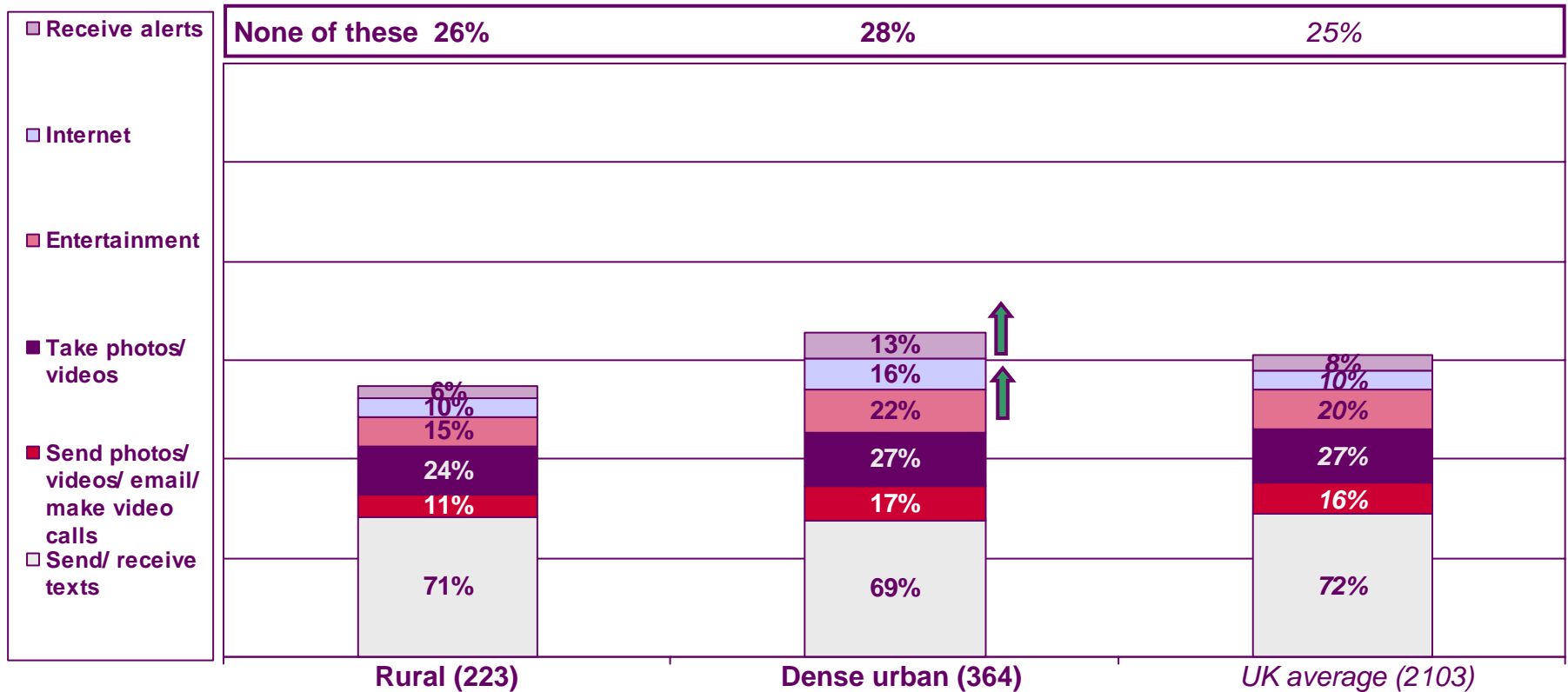


Indicates significantly lower or higher than 2004 dense urban areas

Base : All respondents in dense urban areas (462) and 2004 (687)



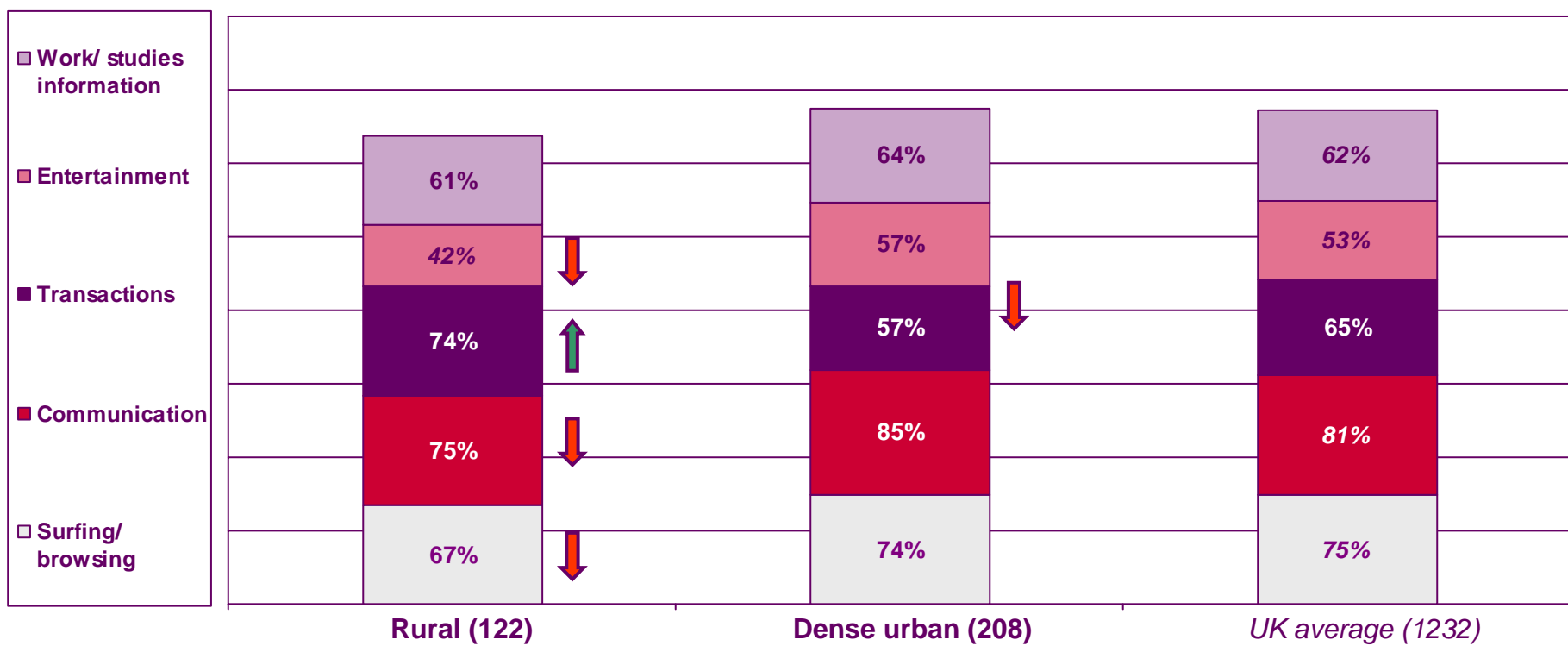
- Amongst people in rural and dense urban areas, mobile phone owners use their phone on a weekly basis in a similar way to the UK average, overall with a slightly narrower use by those in rural areas and a broader use by those in dense urban areas.
- Those in dense urban areas are significantly more likely than those in rural areas to use their mobile phone for sending photos/ videos and for accessing the internet and to receive alerts.



↑ ↓ Indicates significantly lower or higher than 2005 UK average



- Amongst people in rural areas, those with internet access at home differ from their use of the internet from the UK average through being less likely to use the internet for surfing/ browsing, for communication (e.g. e-mail, Instant Messaging), and for entertainment (e.g. downloading, playing games). Those in rural areas are, however, significantly more likely to use the internet for transactions (e.g. banking, shopping online).
- Those in dense urban areas with internet access make a rather broader use of the internet generally, but are significantly less likely to use the internet for transactions.



↓ ↑ Indicates significantly lower or higher than 2005 UK average

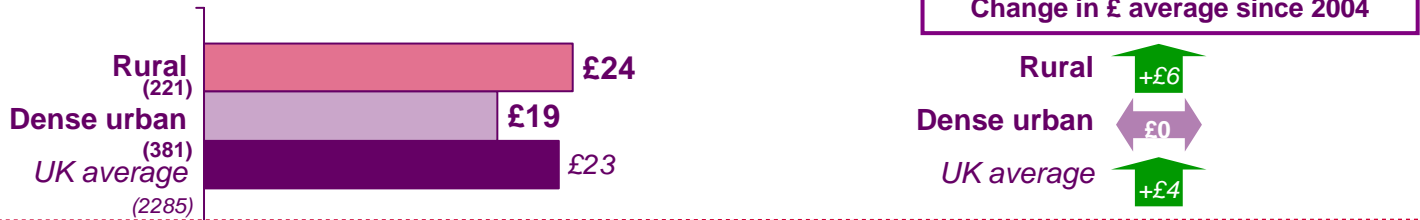
Base : All with internet access at home



- Amongst people in rural and dense urban areas with each type of service the average self-reported monthly spend is close to the UK average for most services, but those in rural areas appear to spend less on their mobile phone service and internet service compared to those in dense urban areas.
- Change in spend compared to 2004 is similar to the UK average

Usage

Landline



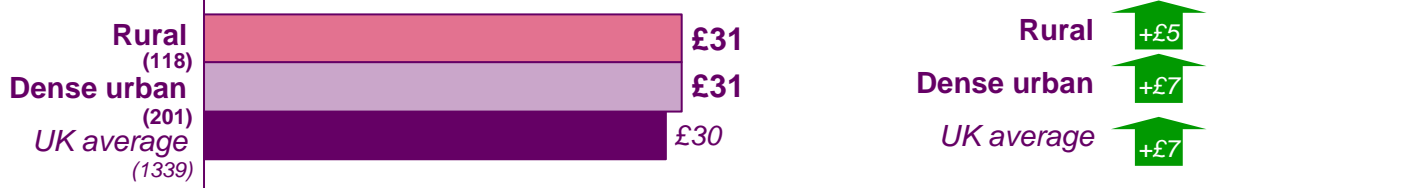
Mobile



Internet



Multi-channel TV



Base : Owners of each type of device/ service



Landline (221)

- 23% have any concerns or worries (30% for UK)
- 17% costs
 - 1% privacy (unsolicited calls)

Increased from 20% with any concerns or worries in 2004

Mobile phone (223)

- 17% have any concerns or worries (31% for UK)
- 10% costs
 - 5% choice/ access/ coverage

Decreased from 21% with any concerns or worries in 2004

Internet (122)

- 47% have any concerns or worries (41% for UK)
- 30% spam/ pop-ups/ viruses/ control
 - 15 security

Increased from 29% with any concerns or worries in 2004

Digital TV (118)

- 18% have any concerns or worries (24% for UK)
- 9% costs
 - 4% choice/ access
 - 3% poor quality content

No real change from 17% with any concerns or worries in 2004



Landline (381)

- 33% have any concerns or worries (30% for UK)
- 22% costs
- 8% privacy (unsolicited calls)

Increased from 23% with any concerns or worries in 2004

Mobile phone (364)

- 44% have any concerns or worries (31% for UK)
- 35% costs
- 6% unsolicited calls/ texts
- 4% choice/ access/ coverage

Increased from 35% with any concerns or worries in 2004

Internet (268)

- 42% have any concerns or worries (41% for UK)
- 35% spam/ pop-ups/ viruses/ control
- 16% security
- 7% slow/ poor connection

No real change from 38% with any concerns or worries in 2004

Digital TV (449)

- 30% have any concerns or worries (24% for UK)
- 26% costs
- 5% poor quality content
- 4% choice/ access

Increased from 17% with any concerns or worries in 2004



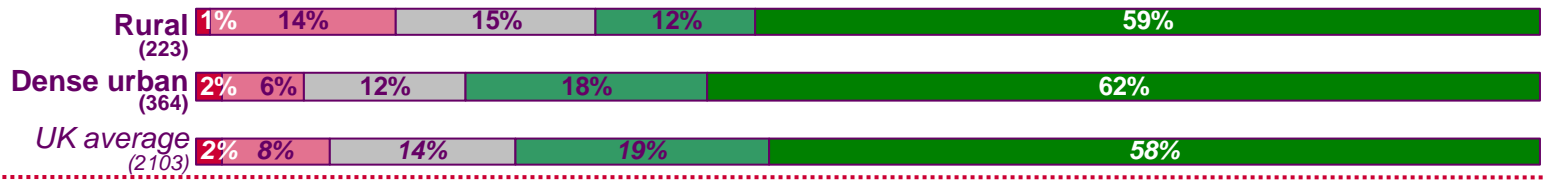
- Similar to the UK average people in rural and dense urban areas who own each type of device/ service landline and mobile phones are most likely to be considered essential, followed by the TV service, and then the internet
- Compared to owners across the UK, those in dense urban areas are less likely to consider the landline services to be essential and those in rural areas are less likely to consider the TV service to be essential



Landline



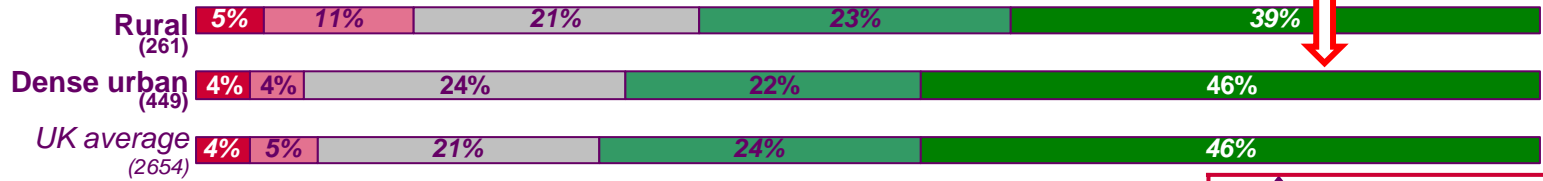
Mobile



Internet



TV

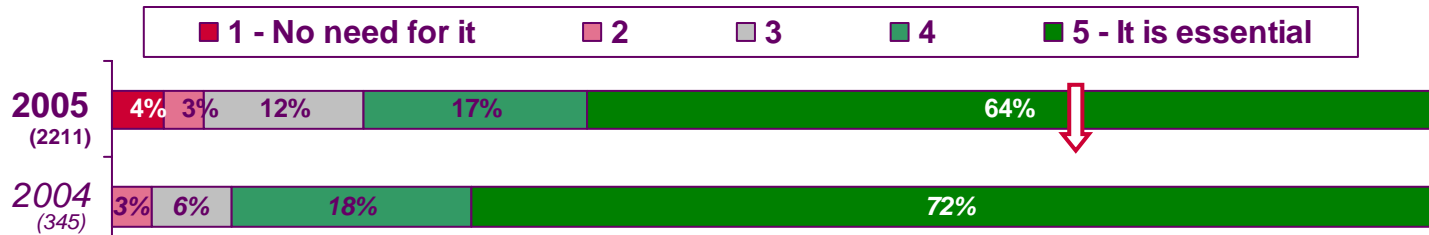


↓ ↑ Indicates significantly lower or higher than 2005 UK average

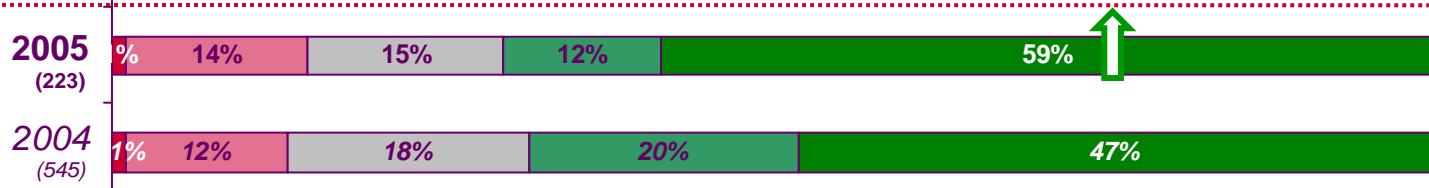


- Compared to 2004 each of the four services sees significant change in the proportion of owners rating the services as essential.
- Mobile phone and internet services are perceived as essential by more consumers compared to last year, and landline phone and TV services by fewer than last year.

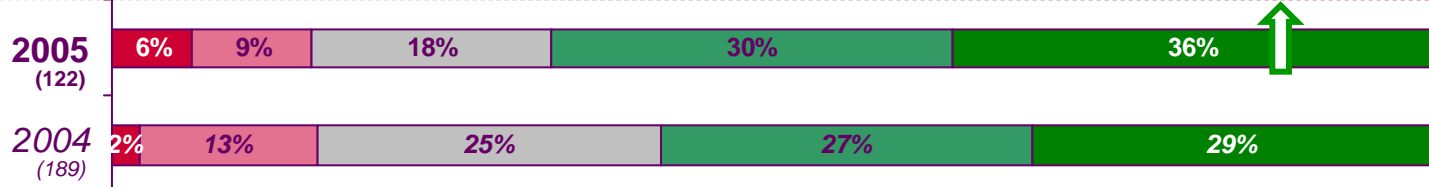
Landline



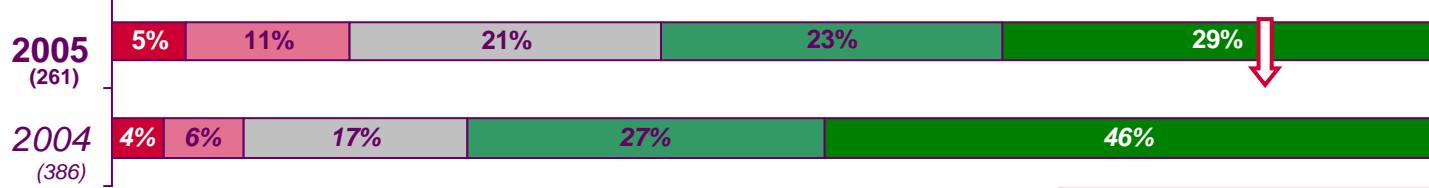
Mobile



Internet



TV

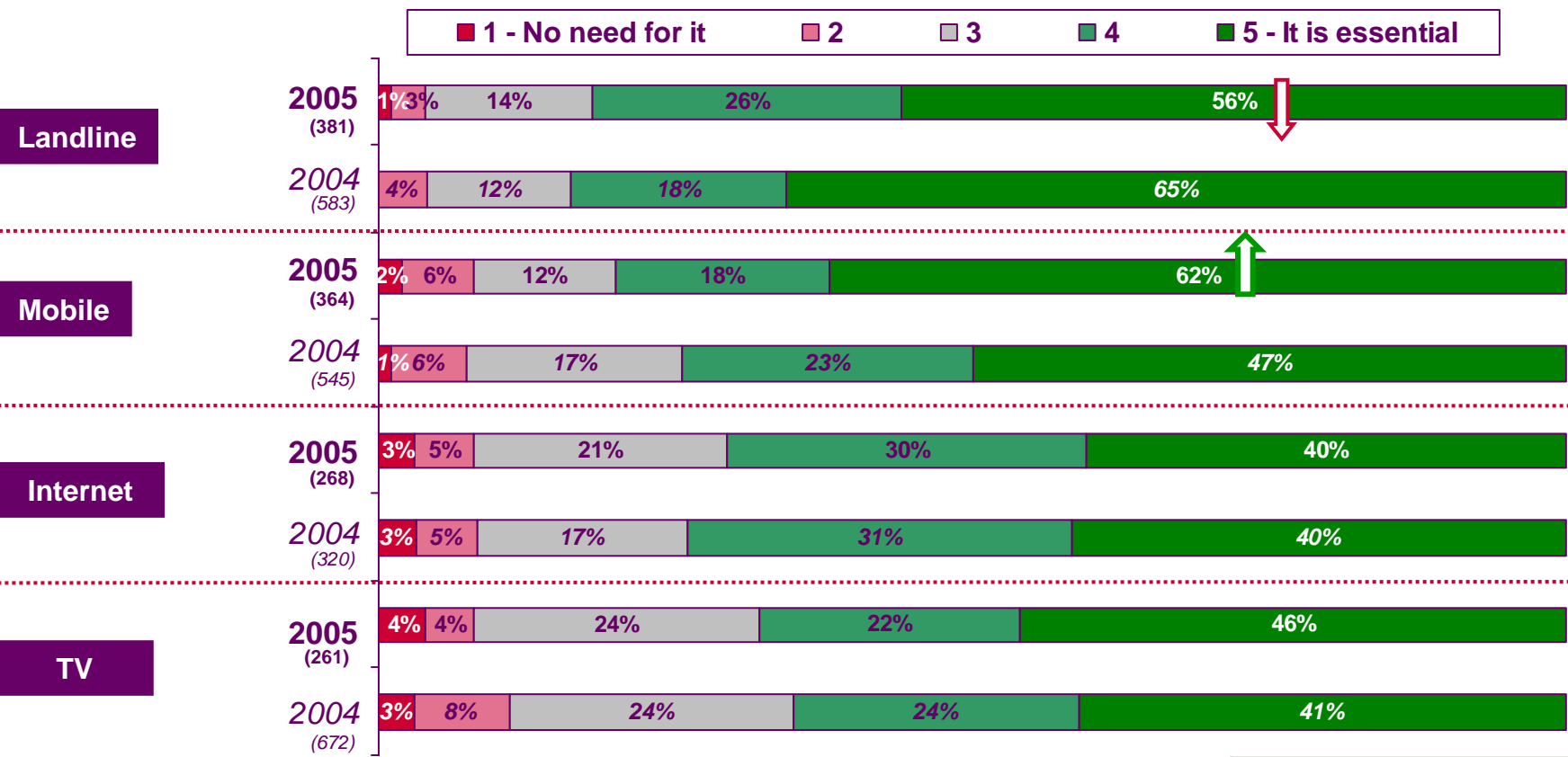


↑ ↓ Indicates significantly lower or higher than 2004 rural areas

Base : Owners of each type of device/ service in rural areas



- Compared to 2004 there are no changes in the perceived importance of internet and TV services amongst people in dense urban areas, but 2005 sees an increase in users rating the mobile phone service as being essential and a decrease for the landline phone service

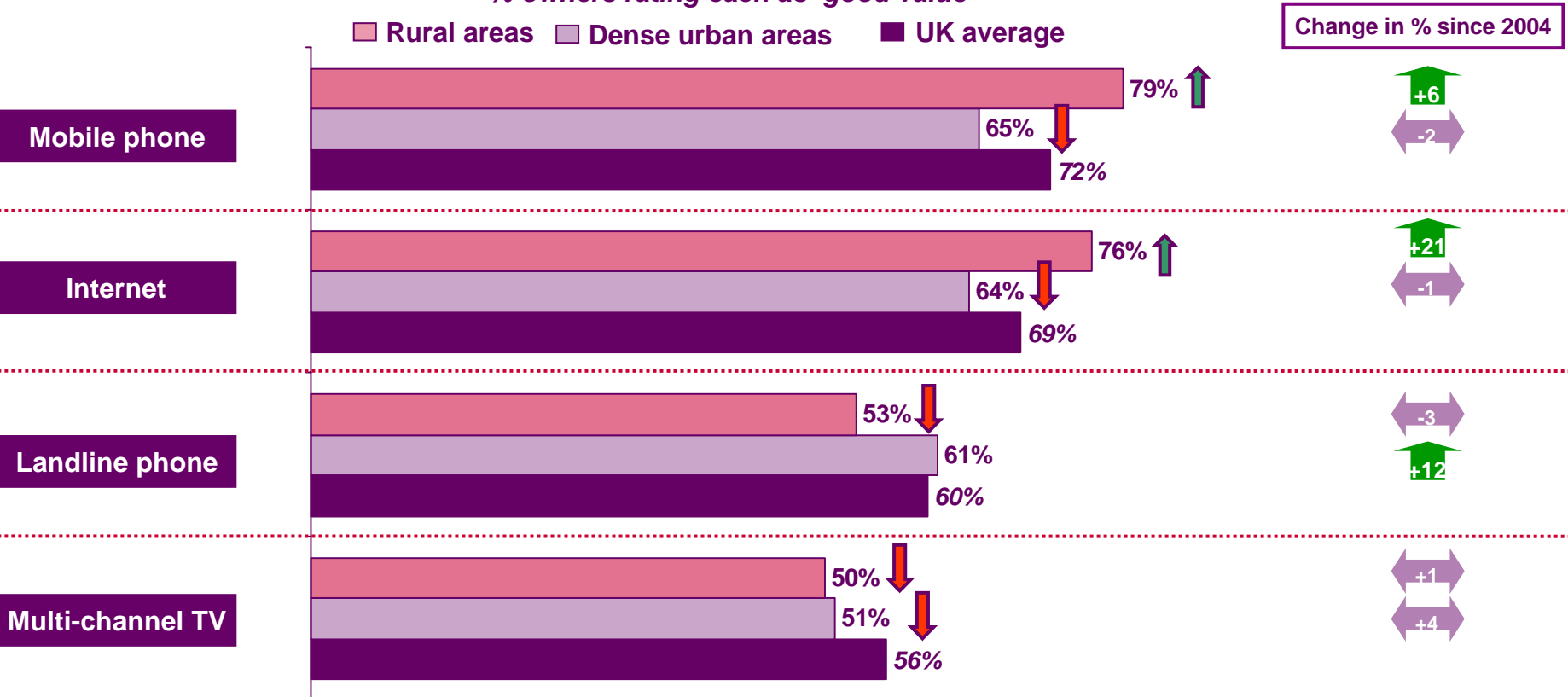


↓ ↑ Indicates significantly lower or higher than 2004 dense urban areas



- Whilst those in rural areas are more likely than the UK average to rate the mobile phone and internet services as providing 'good value' – a perception that has increased since 2004 - they are less likely to assign a 'good value' rating for their landline phone and TV services.
- Those in dense urban areas are less likely to perceive they get good value from each of the services, with the exception of landlines which has seen a rise in perceived 'good value' since last year.

% owners rating each as 'good value'



↑ ↓ Indicates significantly lower or higher than 2005 UK average



- Amongst people in rural areas who own each type of service/ device satisfaction with the overall service provided is highest for landline and internet services, and lowest for the TV service.
- Consumers in rural areas are significantly less satisfied with various aspects of the different communications services, as indicated by the red arrows. Other than for internet levels of dissatisfaction are broadly similar to average due to higher neutral or don't know responses.

Attitudes

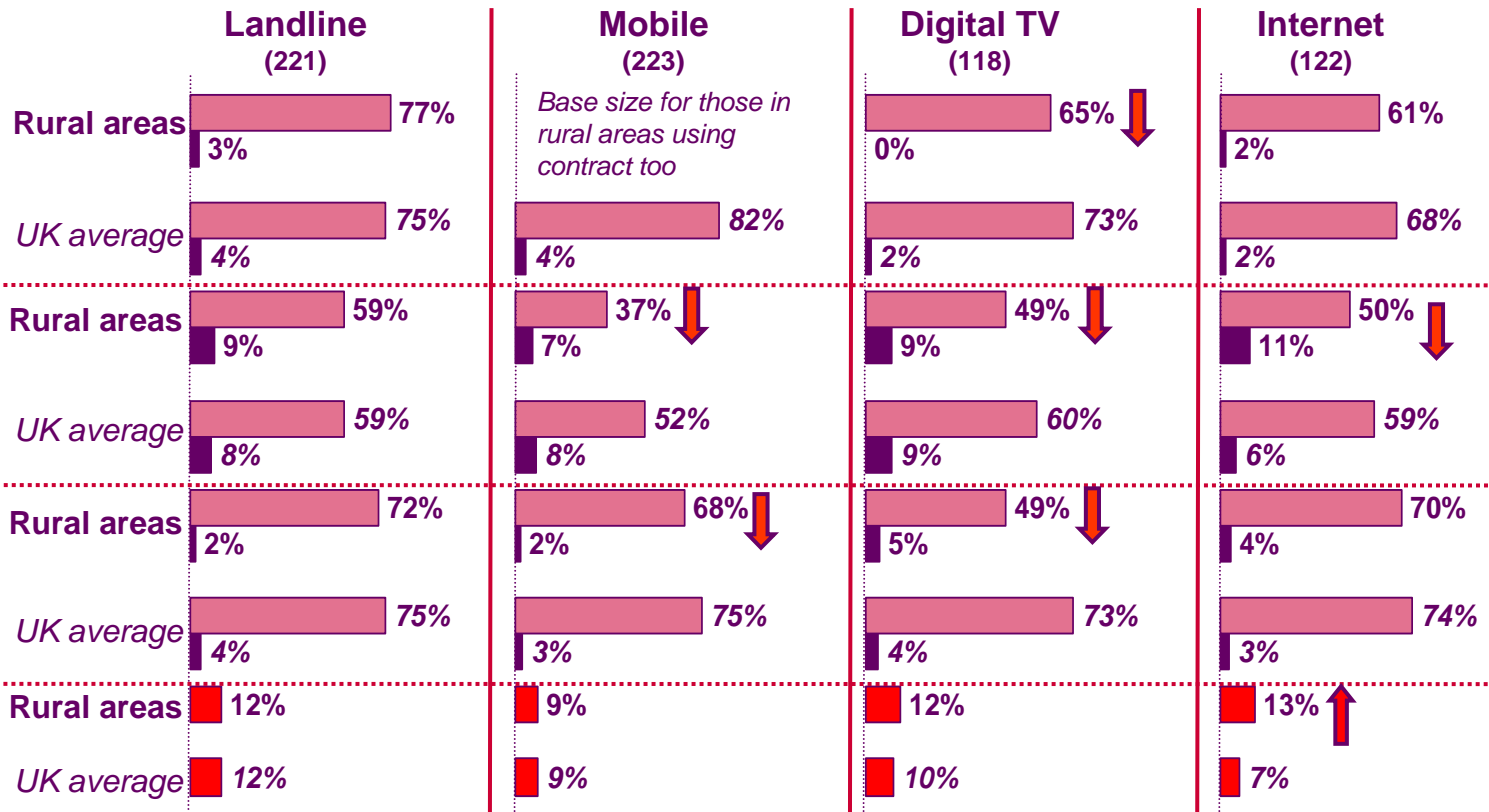
■ Satisfied
■ Dissatisfied

Understanding bills

Supplier making sure you're on best deal

Overall service

ANY DISSATISFACTION



↓ ↑ Indicates significantly lower or higher than 2005 UK average

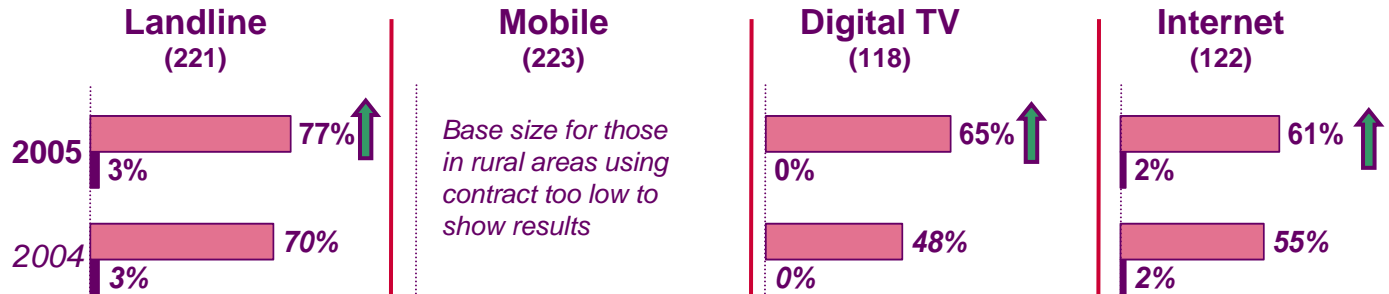


- Amongst people in rural areas, changes since 2004 in terms of satisfaction with services and suppliers are a mix of negative and positive, but wholly positive regarding the ease of understanding bills. The rating for the overall service received for the digital TV service has declined, but the dissatisfaction rating is unchanged. The incidence of any dissatisfaction for the internet service has increased.

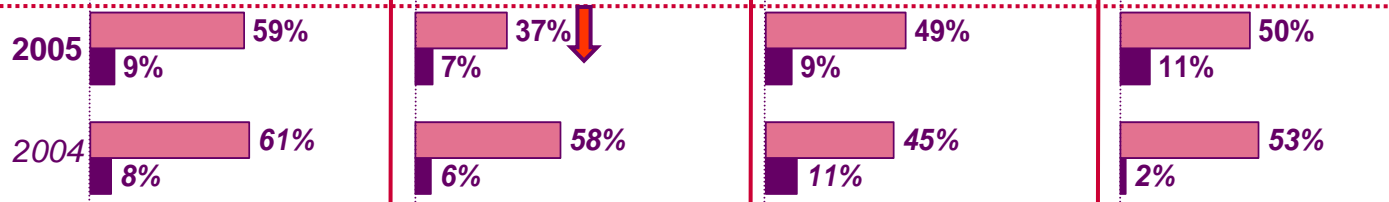
Attitudes

■ Satisfied
■ Dissatisfied

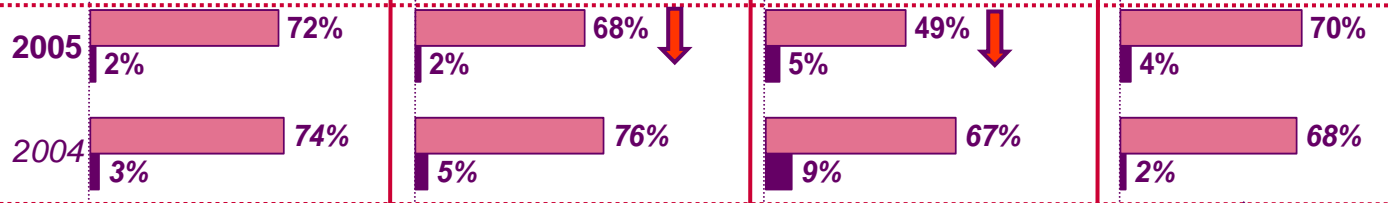
Understanding bills



Supplier making sure you're on best deal



Overall service



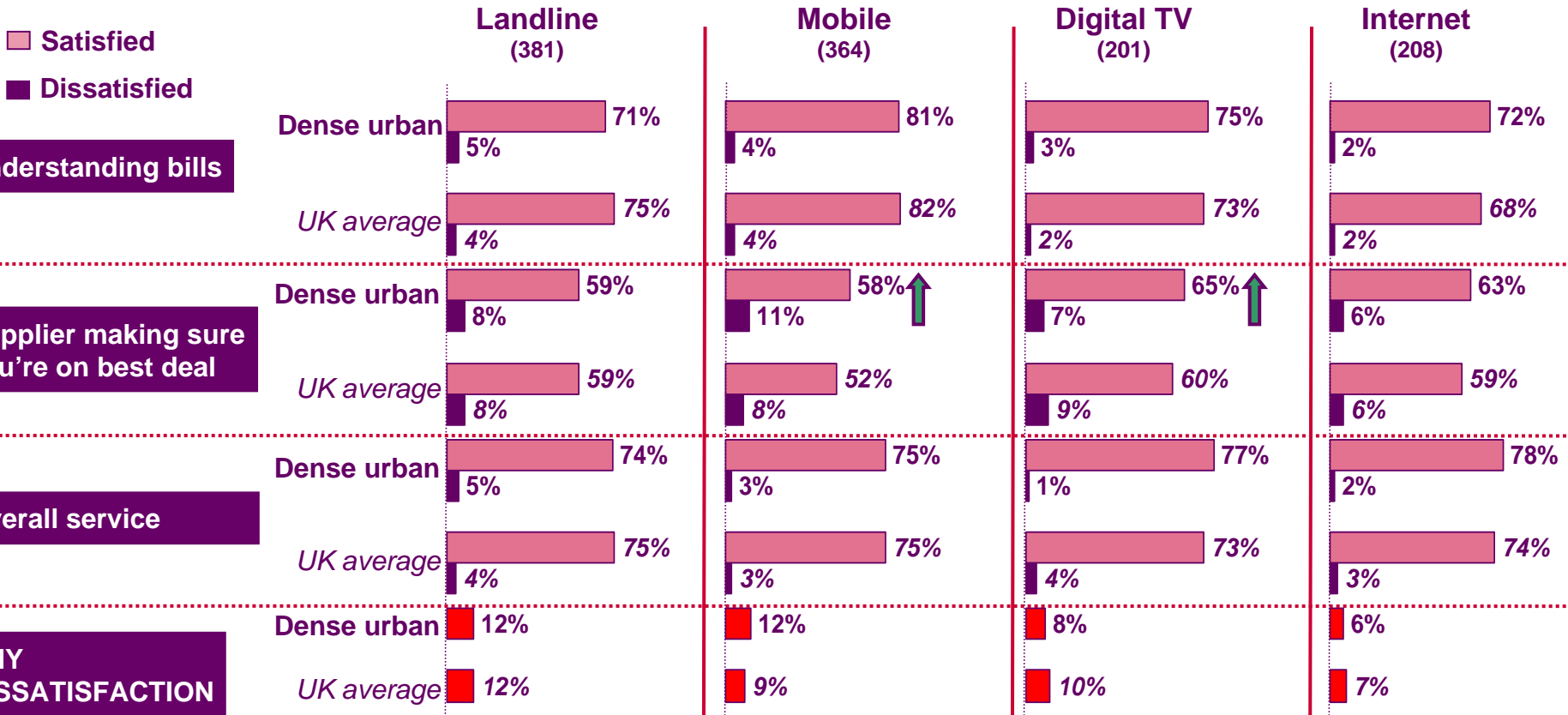
ANY DISSATISFACTION



↑ ↓ Indicates significantly lower or higher than 2004 rural areas



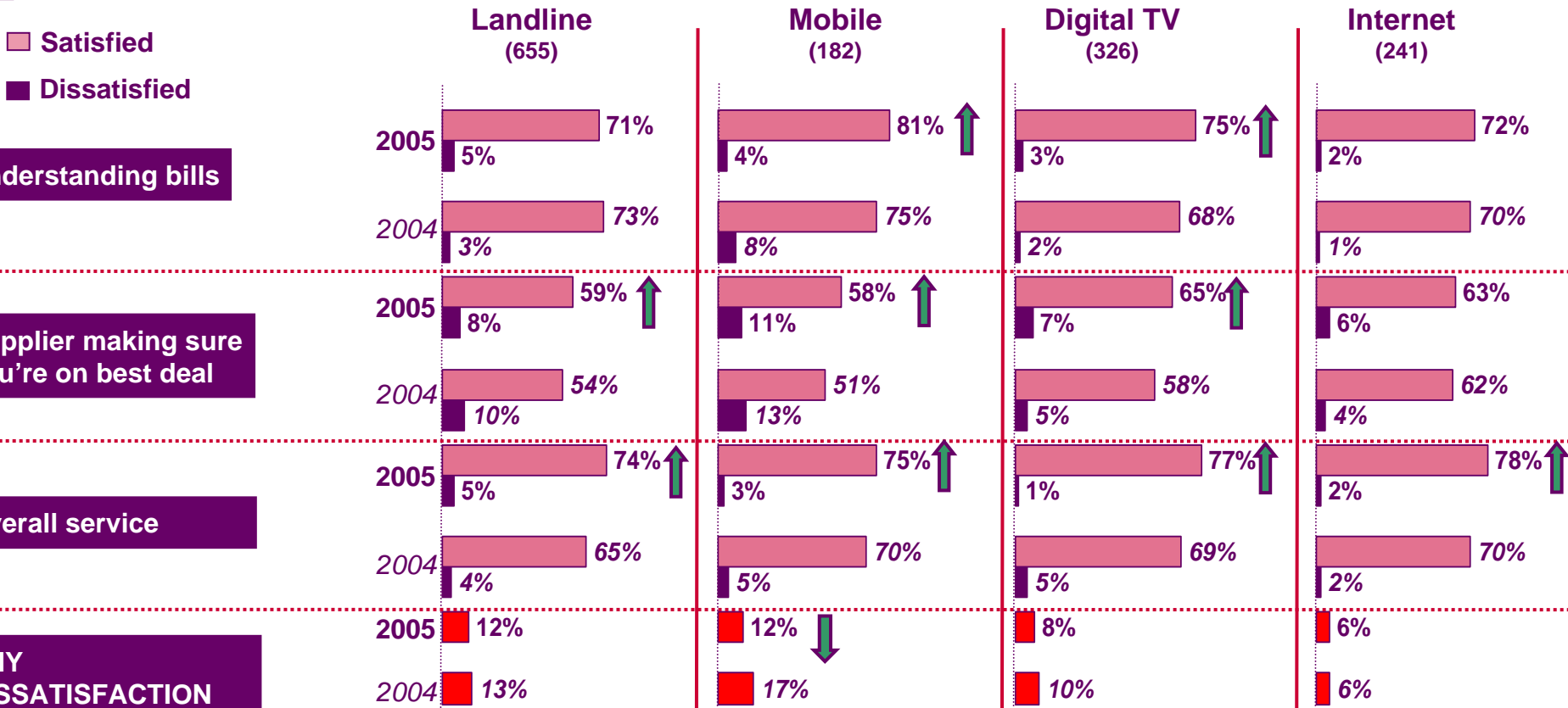
Amongst people in dense urban areas who own each type of service/ device around three quarters of users are satisfied with the overall service provided, with no real difference across the services. Whilst 'You supplier making sure you are on the best of their deals for you' is the lowest rated aspects of service, those in dense urban areas are significantly more satisfied than the UK average in this respect for the mobile phone and digital TV services.



↑ ↓ Indicates significantly lower or higher than 2005 UK average



• Amongst people in dense urban areas, changes since 2004 in terms of satisfaction with services and suppliers are wholly positive, in particular regarding the mobile phone and internet services. Other than the mobile phone service, however, there has been no decreased in overall dissatisfaction ratings assigned.



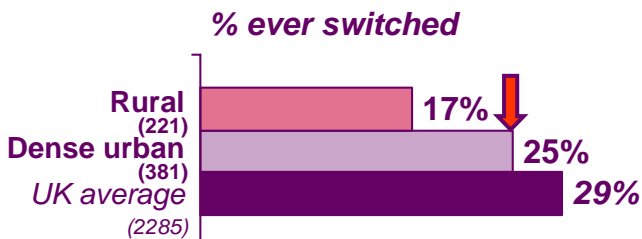
↑ ↓ Indicates significantly lower or higher than 2004 dense urban areas



- People in rural and dense urban areas are most likely to have ever changed mobile phone service provider, as with all UK adults, and above the UK average for those in rural areas, who are also more likely to have ever switched internet supplier. Those in rural areas are, however, less likely than the UK average to have switched landline or TV service suppliers.
- Those in dense urban areas differ from the UK average only in terms of being less likely to have switched internet suppliers.
- Other than the landline service, the incidence of having switched suppliers is broadly unchanged since 2004.

Switching

Landline



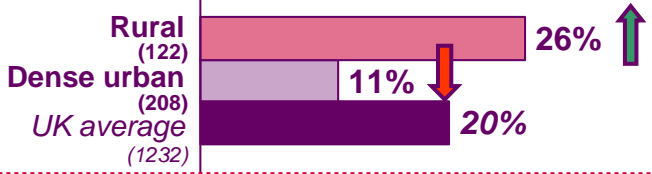
Change in % switching for rural, dense urban, and for UK since 2004



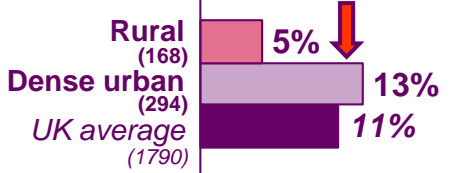
Mobile



Internet



Digital TV

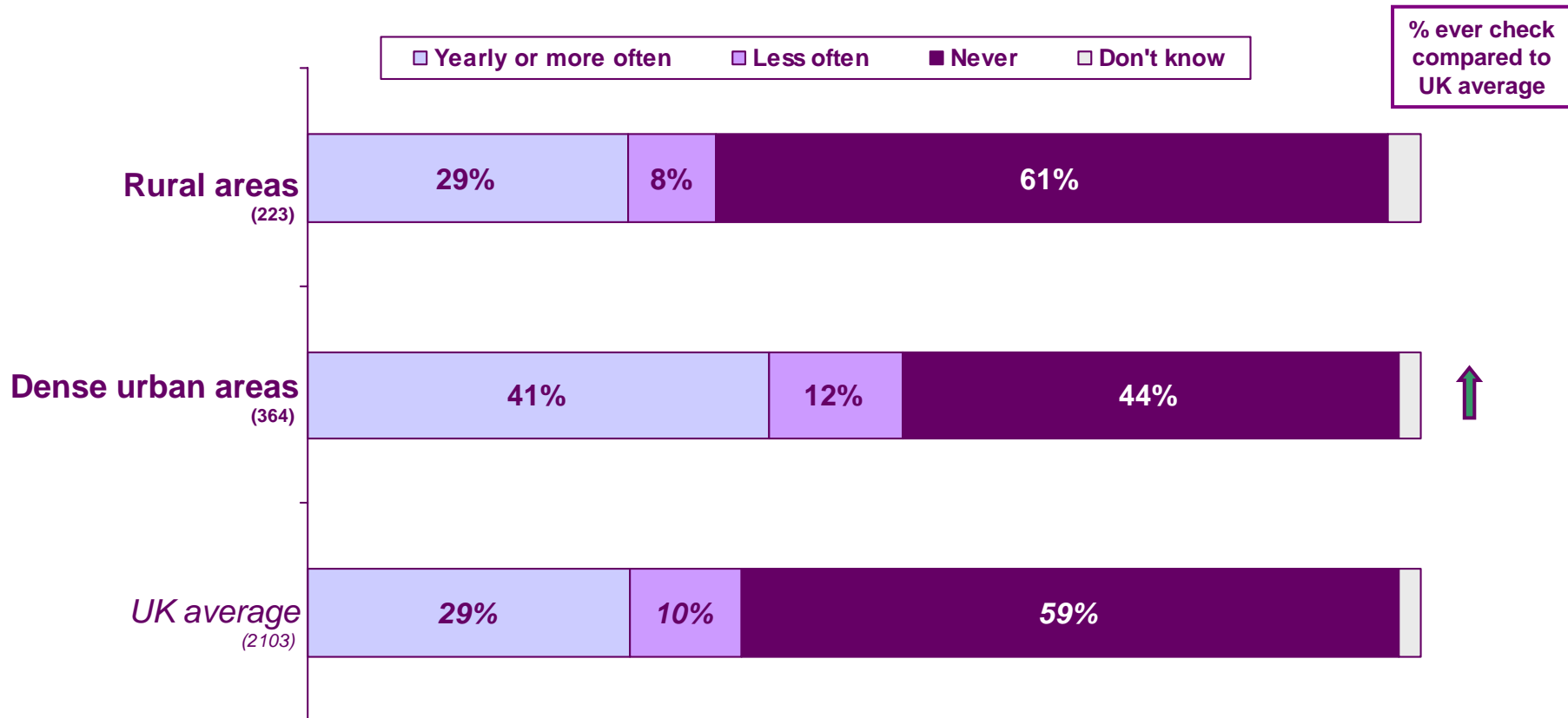


Indicates significantly lower or higher than 2005 UK average

Base : Owners of each type of device/ service



- Around four in ten mobile customers in rural areas ever check whether they are on the best tariff or deal, matching the UK average. This behaviour is more evident amongst mobile customers in dense urban areas at 53%.
- Across the UK, those with a contract phone are considerably more likely to ever check than those using pay as you go, but base sizes are too low to make this comparison here.



Base: All who use a mobile phone

↑ Indicates significantly lower or higher than 2005 UK average

- Half of those in rural areas have heard the term digital switchover and are able to describe what the term refers to ('Understand') - significantly above the UK average
- Amongst those in dense urban areas, however, understanding of digital switchover accounts for just one in three people, and as such is significantly below the UK average.
- Both locations see significant increases in understanding of digital switchover compared to 2004, of 34% for rural areas and 17% for dense urban areas.

