



Ofcom Consumer Panel Research Quantitative Research Findings

Focus on Scotland

June 2006








Report outline

- This report compares the findings for residential consumers in **Scotland** with residential consumers in the **UK overall**
 - measures for the 2004 survey are also shown for comparison
- Differences shown of $\pm 5\%$ (where based on all respondents) are statistically significant
- Where findings for Scotland are significantly different from the UK average 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 Scotland  
- 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**

- Increase since 2004 in understanding of broadband and 3G – through being able to describe what the terms mean
- Overall awareness (aware of term or aware of service capability) of 3G and VoIP is lower in Scotland than UK average
- Less likely than UK average to keep informed of developments in communications technologies, in particular regarding digital TV, landlines and internet
- Friends and family are the most popular source of advice, although consumers in Scotland are more likely to refer to suppliers/ stores than UK average
- Higher awareness of digital switchover compared to UK average, and a significant increase in awareness since 2004

Ownership

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

Usage

- Similar uses made of mobile phones to UK average, but fewer use the internet to communicate, transact and for work/ studies information

Attitudes

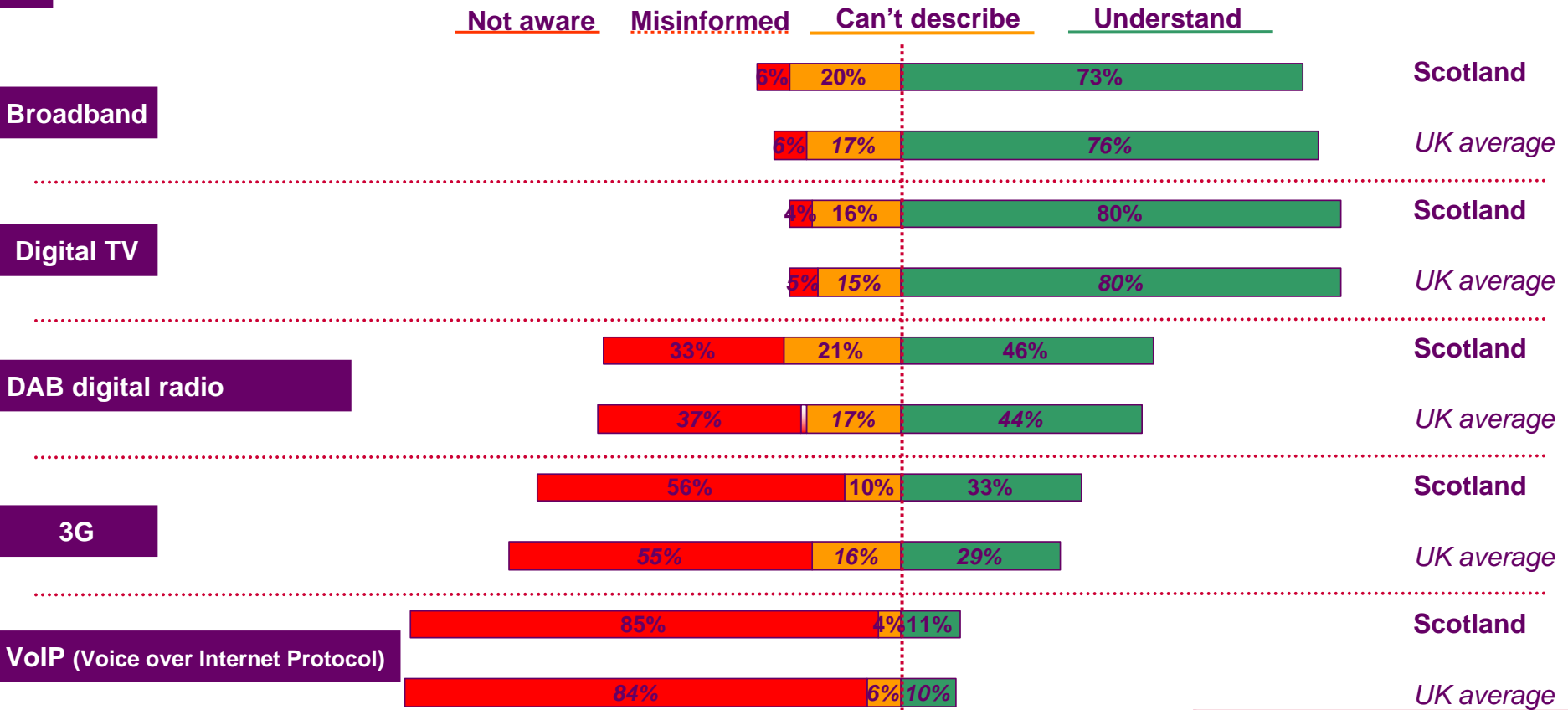
- Generally lower levels of concerns or worries regarding services amongst owners compared to the UK average, and broadly no change in levels since 2004
- More likely than UK average to rate landline and TV services as essential, with an increase in the importance of landline, mobile phone and TV services since 2004
- Lower levels of dissatisfaction for all services compared to the UK average, with increased satisfaction since 2004 most evident amongst internet users
- Internet users switching internet service supplier has fallen since 2004 despite no change in overall internet ownership levels, with this decrease possibly explained by internet users switching to a broadband service with the same supplier

Awareness and understanding of communication terms - comparison to UK

CONSUMER PANEL

Knowledge

- High overall awareness for broadband and digital TV, moderate for DAB digital radio, and low for 3G and VoIP
- Amongst consumers in Scotland, 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)
- Overall levels of understanding do not differ significantly from the UK average



↓ ↑ Indicates significantly lower or higher than 2005 UK average

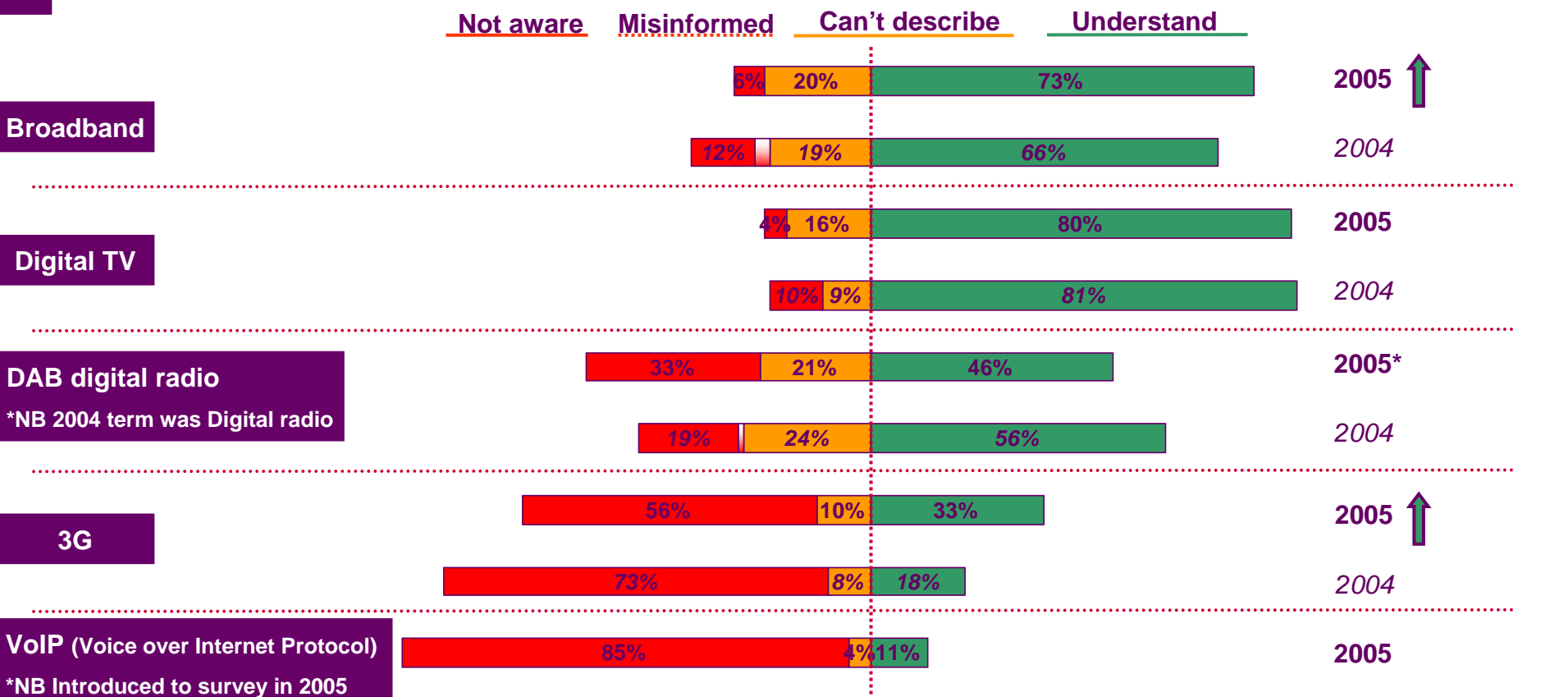
Base : All respondents in Scotland (460) and UK overall (2,689)

CONSUMER PANEL

Awareness and understanding of communication terms – change since 2004

- Significant increases in awareness of the communications terms broadband and 3G amongst consumers in Scotland
- The greatest increases since 2004 are amongst those consumers in low income households (see main report)

Knowledge



Broadband

Digital TV

DAB digital radio

*NB 2004 term was Digital radio

3G

VoIP (Voice over Internet Protocol)

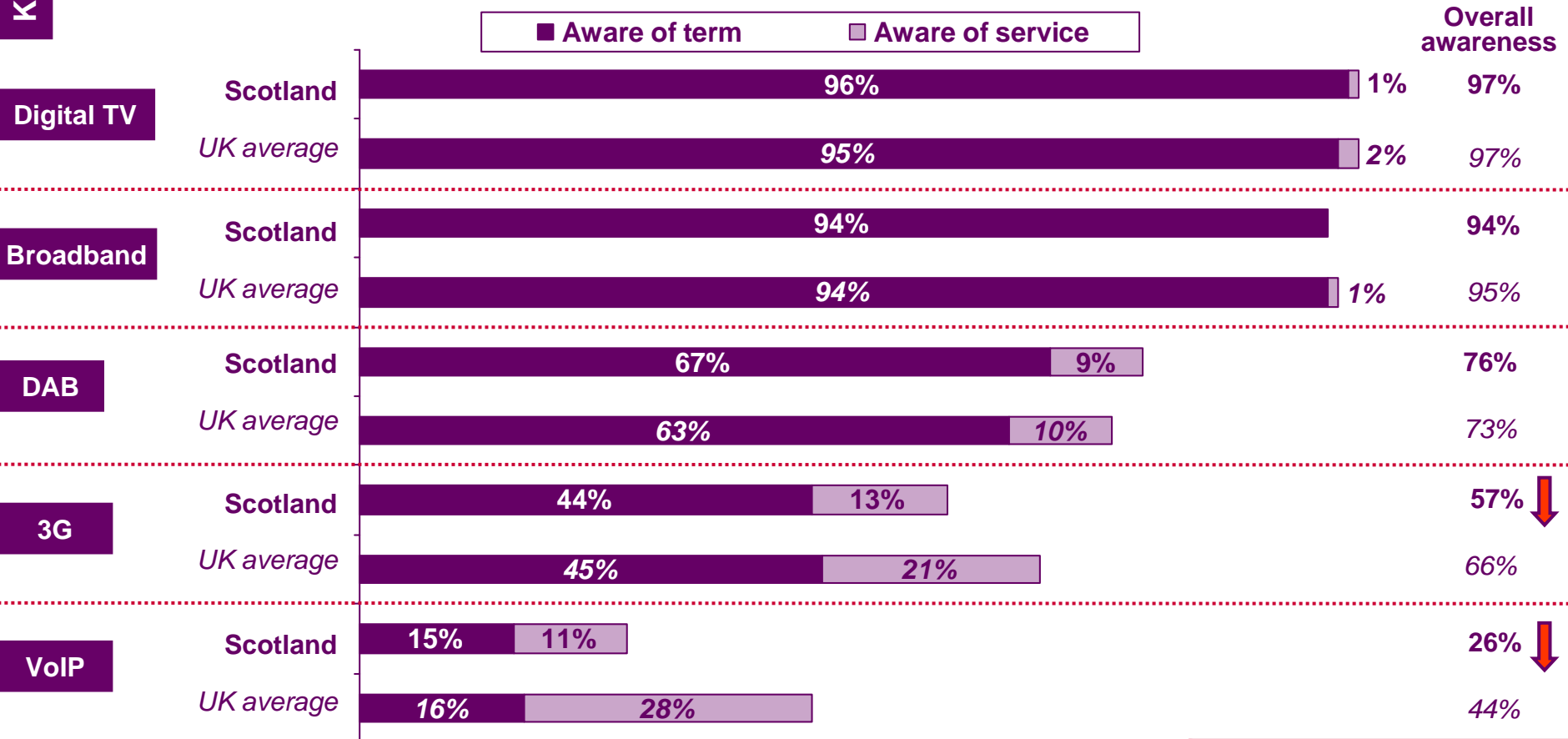
*NB Introduced to survey in 2005

↑ ↓ Indicates significantly lower or higher than 2004 Scotland

Base : All respondents in Scotland 2005 (460) and 2004 (426)

- A significant proportion of consumers in Scotland 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 for 3G and VoIP are, however, lower than for the UK as a whole

Knowledge



↓ ↑ Indicates significantly lower or higher than 2005 UK average

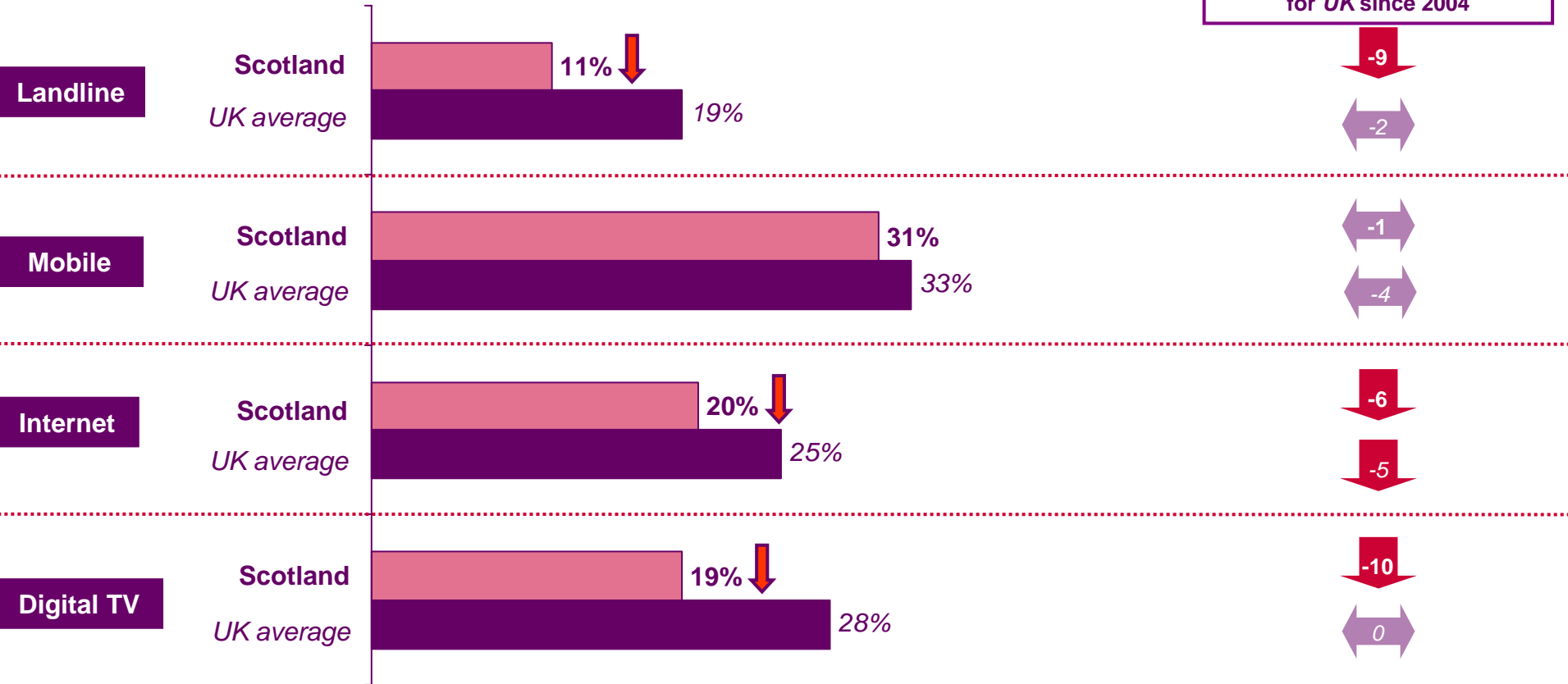
CONSUMER PANEL

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

- Consumers in Scotland are significantly less likely to keep themselves informed about developments for communications services (with the exception of mobile phones) compared to the UK overall
- Compared to 2004, significantly fewer consumers in Scotland keep themselves informed, again with the exception of mobile phones

Knowledge

Change in % for Scotland and for UK since 2004



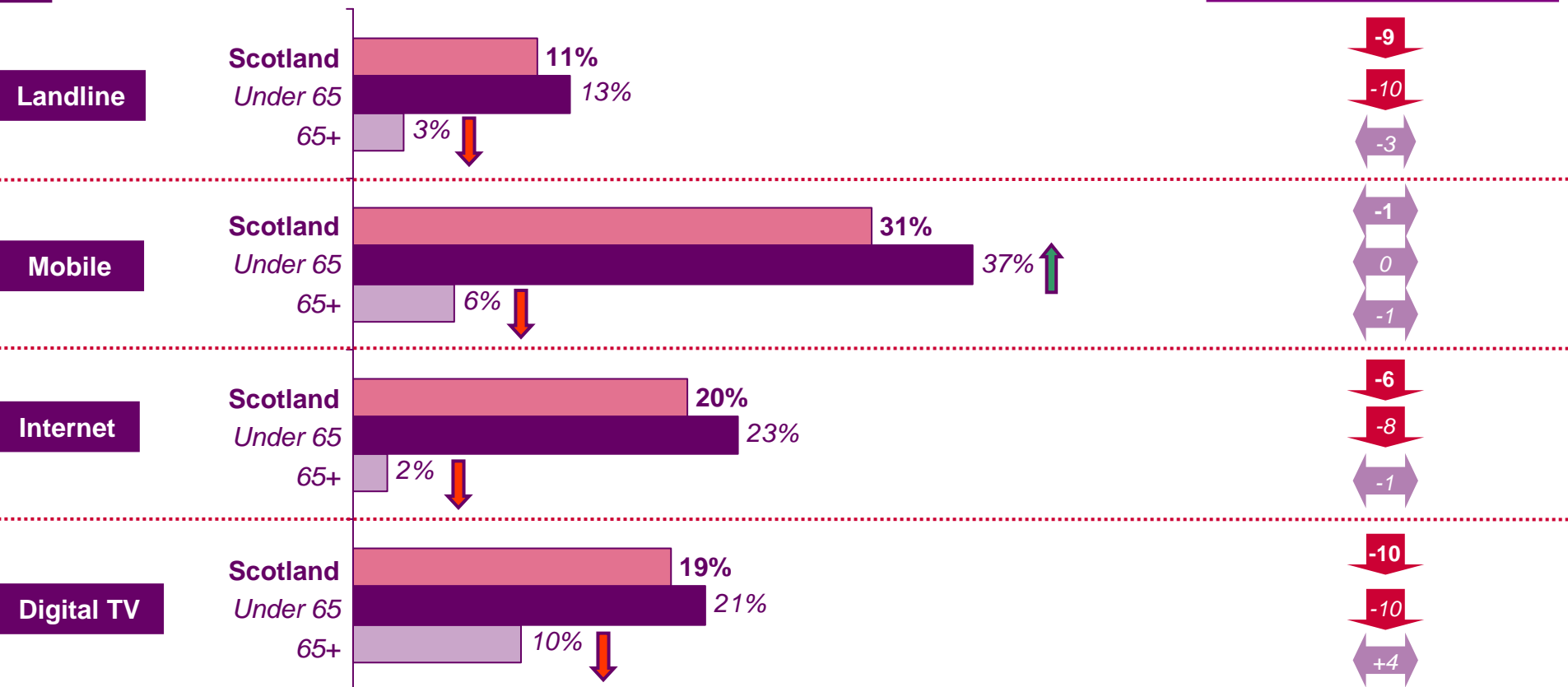
↓ ↑ Indicates significantly lower or higher than 2005 UK average

Base : All respondents in Scotland (460) and UK overall (2,689)



As in 2004, older consumers (aged 65 and over) are significantly less likely to keep informed about developments for communication services

Change in % since 2004



*NB Low base size - treat as indicative only

Base : All respondents in Scotland (460), Under 65s (378) and 65+ (*82)

Indicates significantly lower or higher than 2005 Scotland average

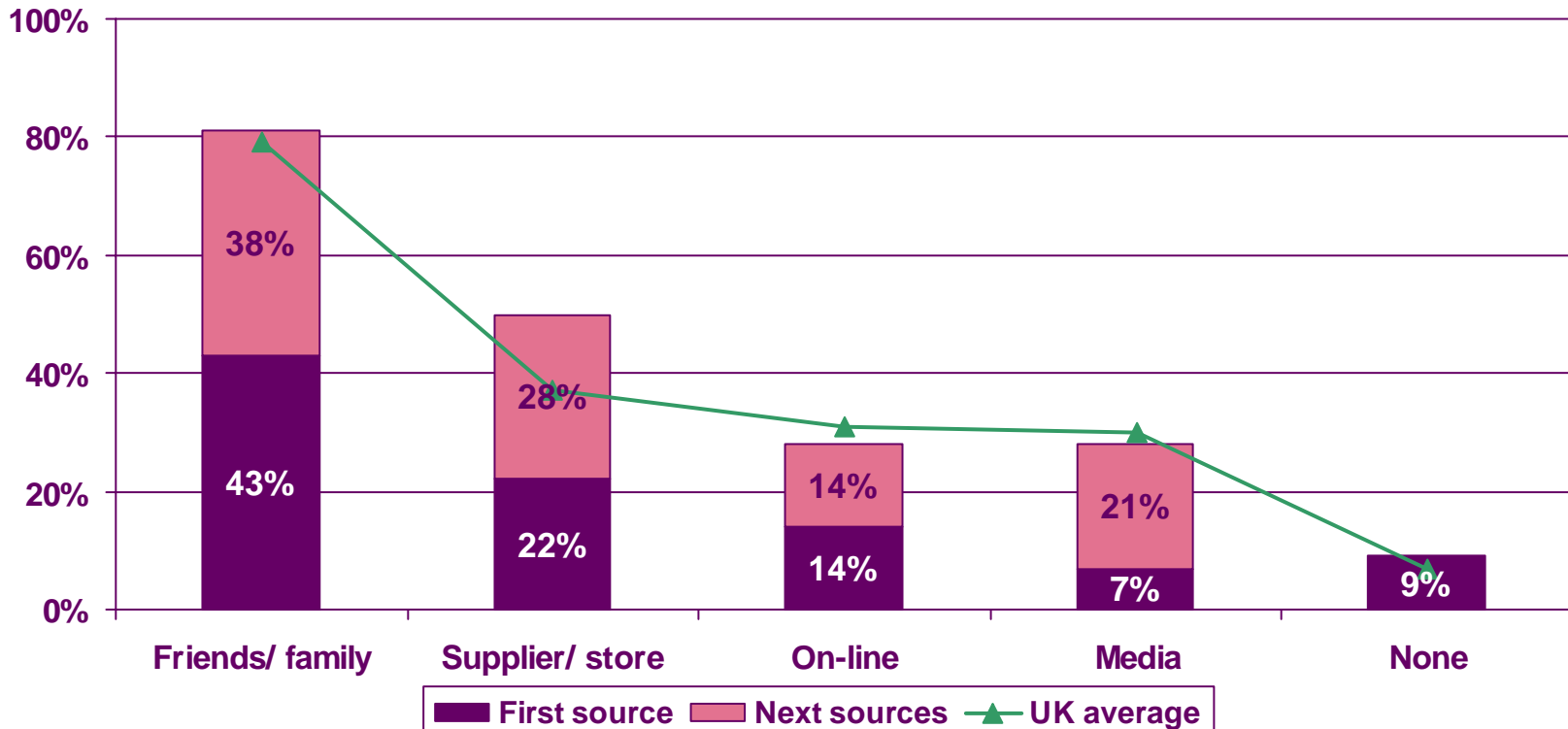
CONSUMER PANEL

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

Knowledge

- Friends and family are the most popular source of advice and information on communications sources for consumers in Scotland, followed by suppliers/ stores selling the services, with both sources seeing a significant increase in nominations since 2004
- Consumers in Scotland are significantly more likely to nominate suppliers/ stores than consumers across the UK as a whole

Source	Change in % since 2004 Scotland	Change in % since 2004 UK
Friends/ family	+11	+10
Supplier/ store	+11	-2
On-line	+8	+9
Media	+6	-1
None	0	-1



Base : All respondents in Scotland (460) and UK overall (2,689)

- Amongst consumers in Scotland, older consumers (aged 65 and over) continue to be significantly less likely to nominate sources of advice or information on communication services – with over a fifth of this age group unable to nominate any sources

Change in % since 2004 Scotland

+11

+11

+8

+6

0

Change in % since 2004 Under 65

+9

+10

+11

+5

0

Change in % since 2004 65 and over

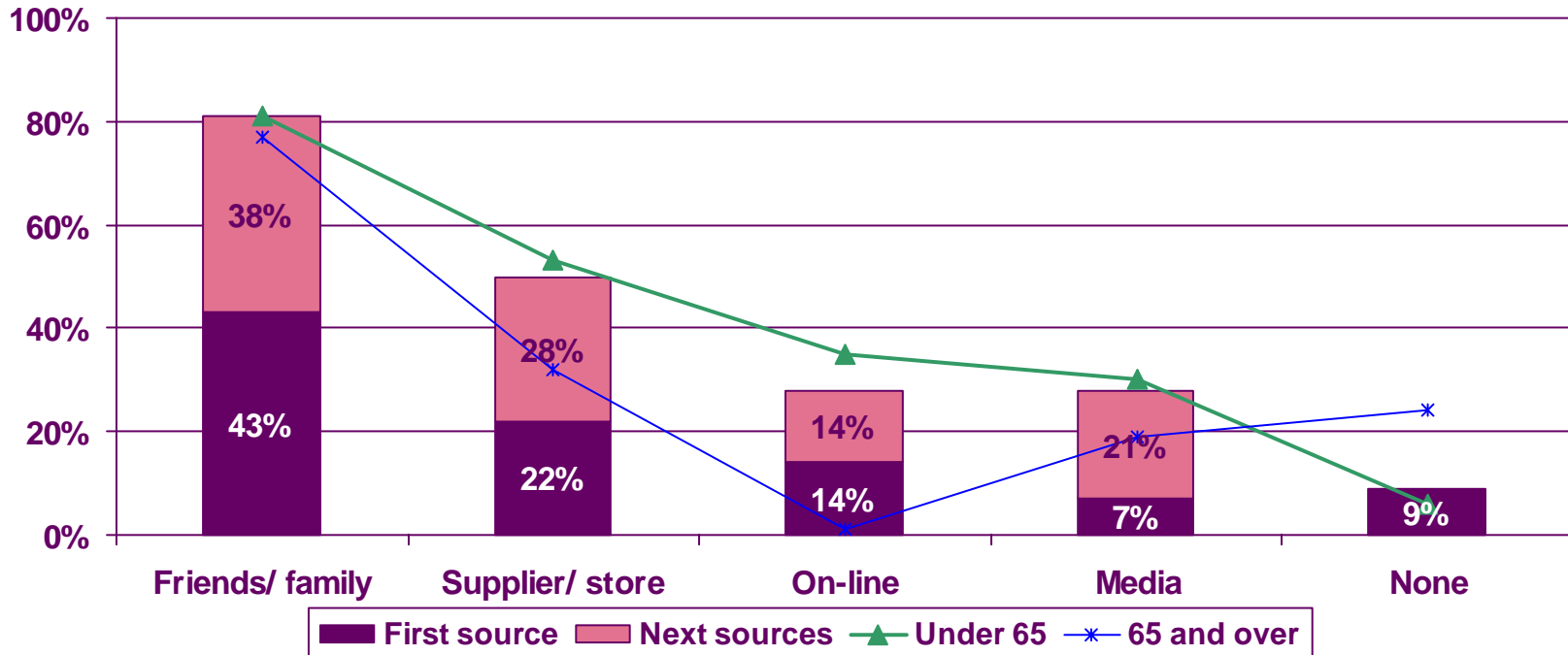
+12

+11

-2

+9

0

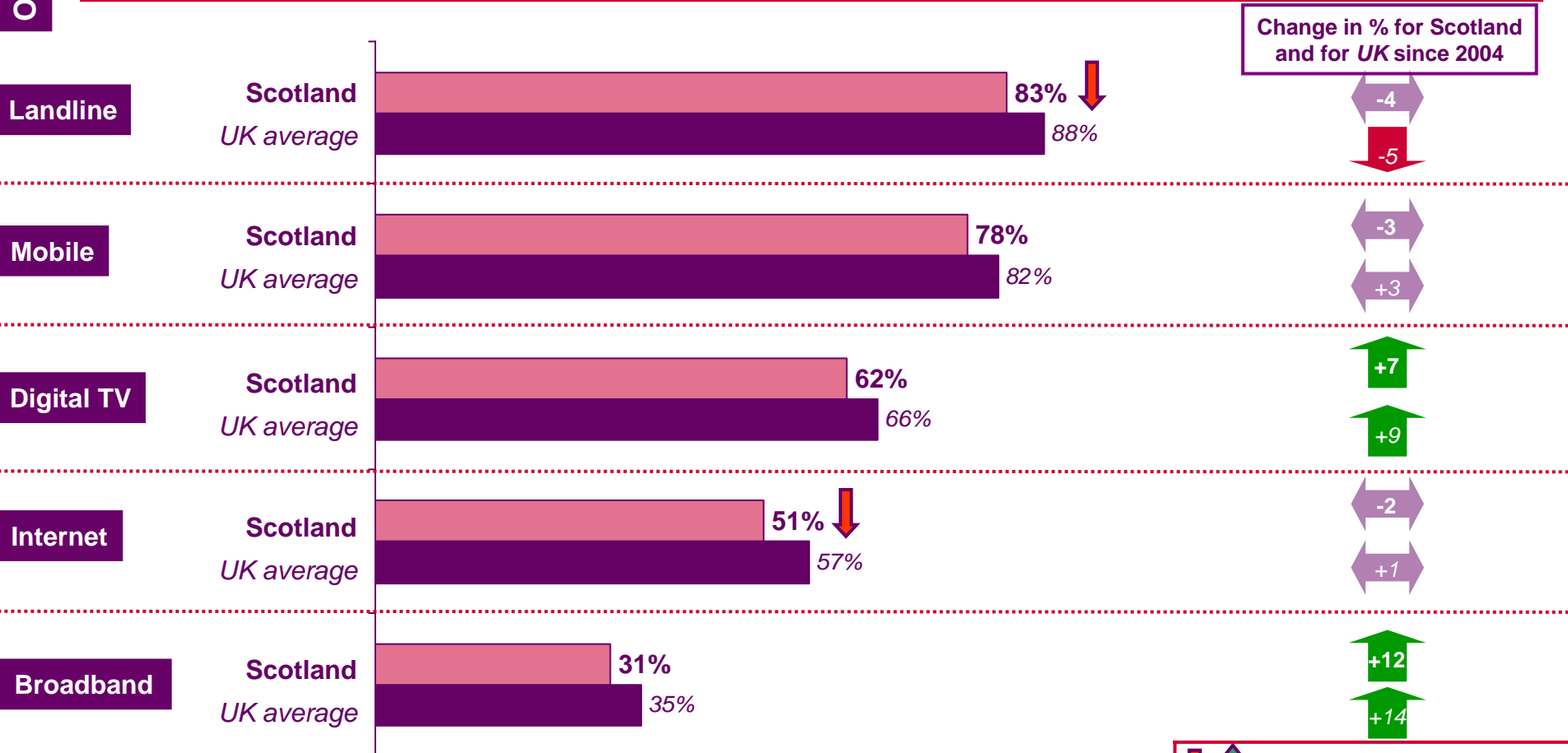


CONSUMER PANEL

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

Ownership

- Consumers in Scotland significantly less likely to have a landline and to have internet access at home compared to the UK as a whole
- Ownership of digital TV and broadband access to the internet has increased significantly since 2004 amongst consumers in Scotland, as is also the case for the UK as a whole



↓ ↑ Indicates significantly lower or higher than 2005 UK average

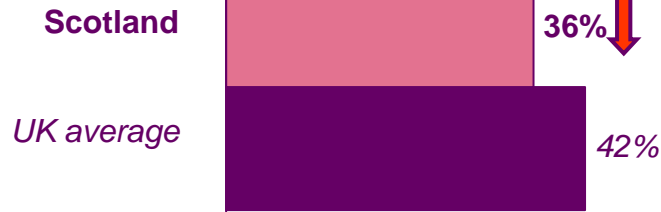
Base : All respondents in Scotland (460) and UK overall (2,689)

- One in five consumers in Scotland own just one of the four communications technologies (landline, mobile phone, digital TV or the internet)
- Owning all four of these types communications technology is significantly less common amongst consumers in Scotland compared to the UK as a whole, due to lower ownership levels generally for each of the platforms

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



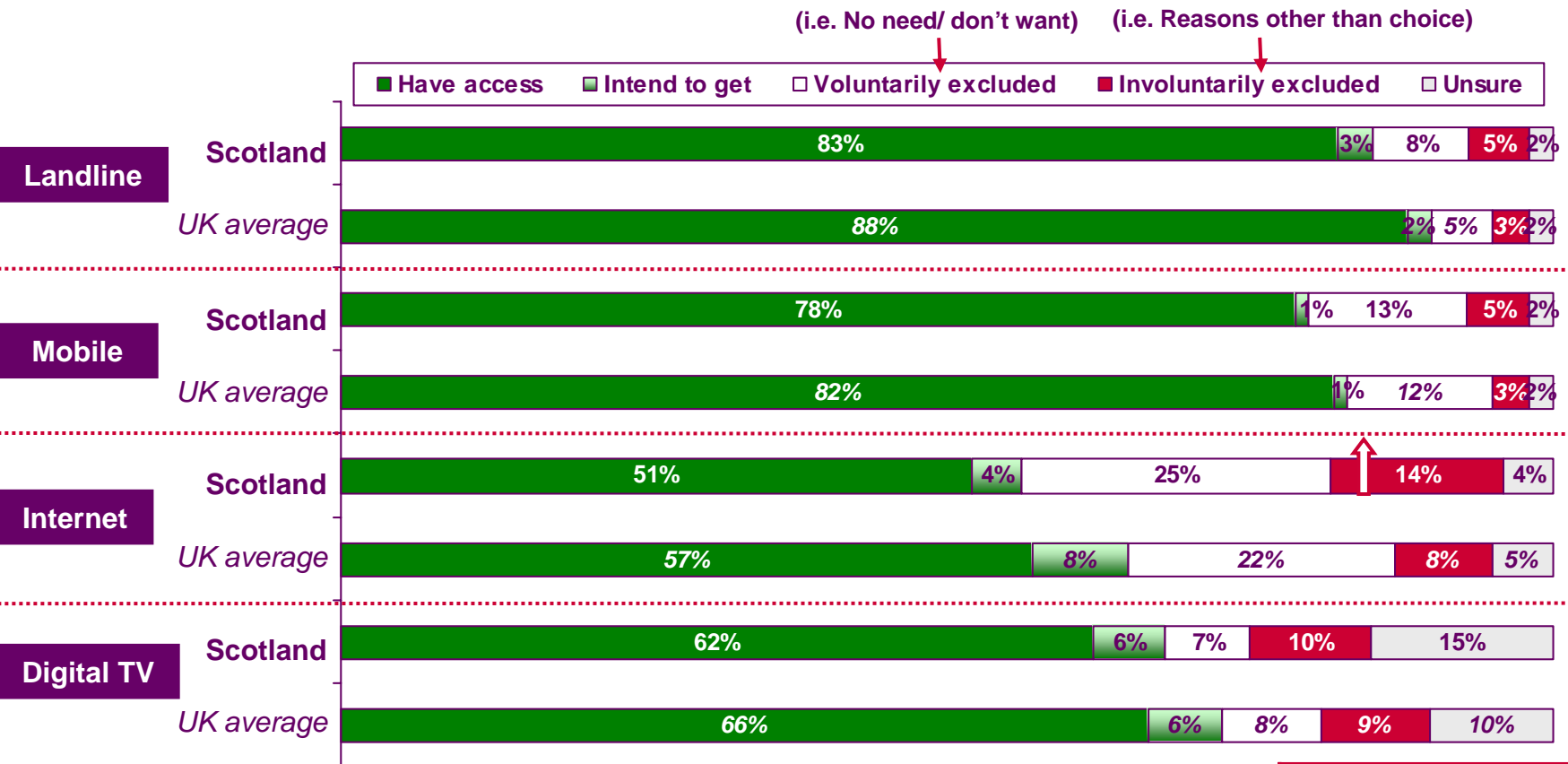
Have all four of landline,
mobile, digital TV and
internet at home



↓ ↑ Indicates significantly lower or higher than 2005 UK average



- 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 Scotland are significantly more likely to be involuntarily excluded from having the internet at home compared to the UK



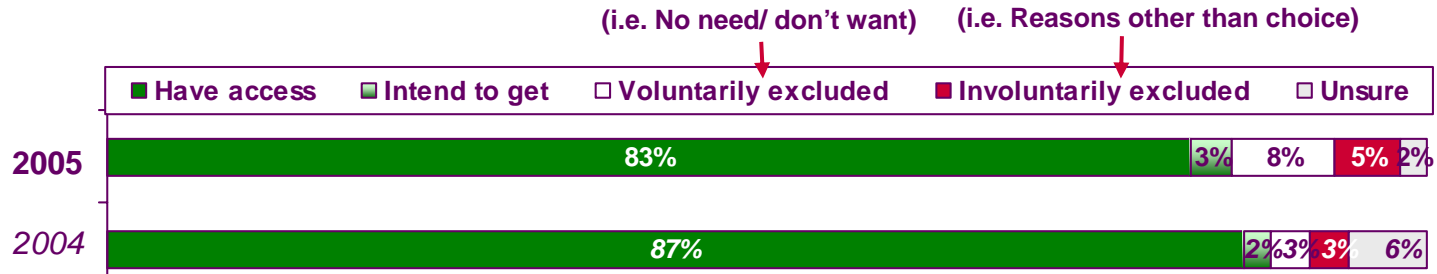
Base : All respondents in Scotland (460) and UK overall (2,689)



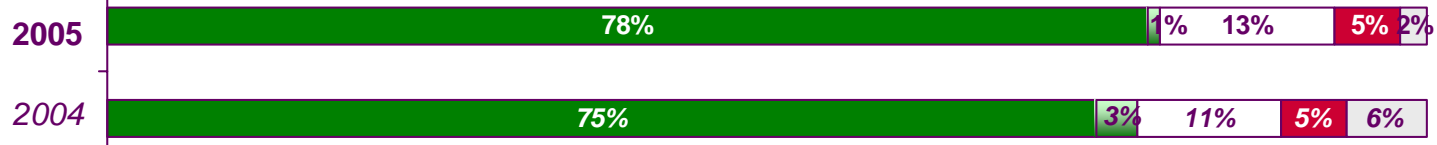
Ownership

- Compared to 2004, there has mostly been little change in levels of ownership, voluntary and involuntary exclusion for consumers in Scotland
- The exception is digital TV, where the increase in ownership since 2004 has brought about a significant decrease in the proportion of consumers in Scotland who are voluntarily excluded

Landline



Mobile



Internet



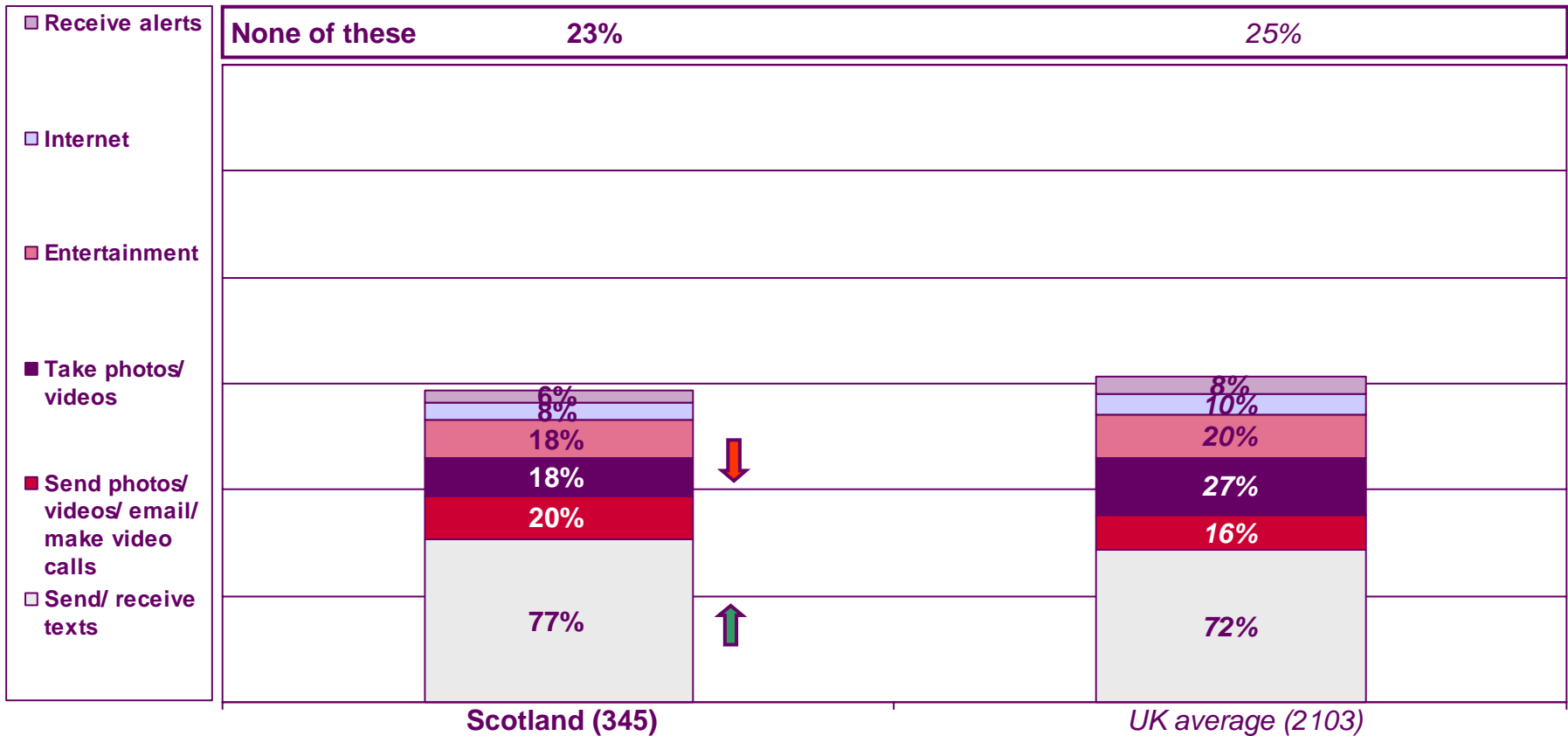
Digital TV



↑ ↓ Indicates significantly lower or higher than 2004 Scotland

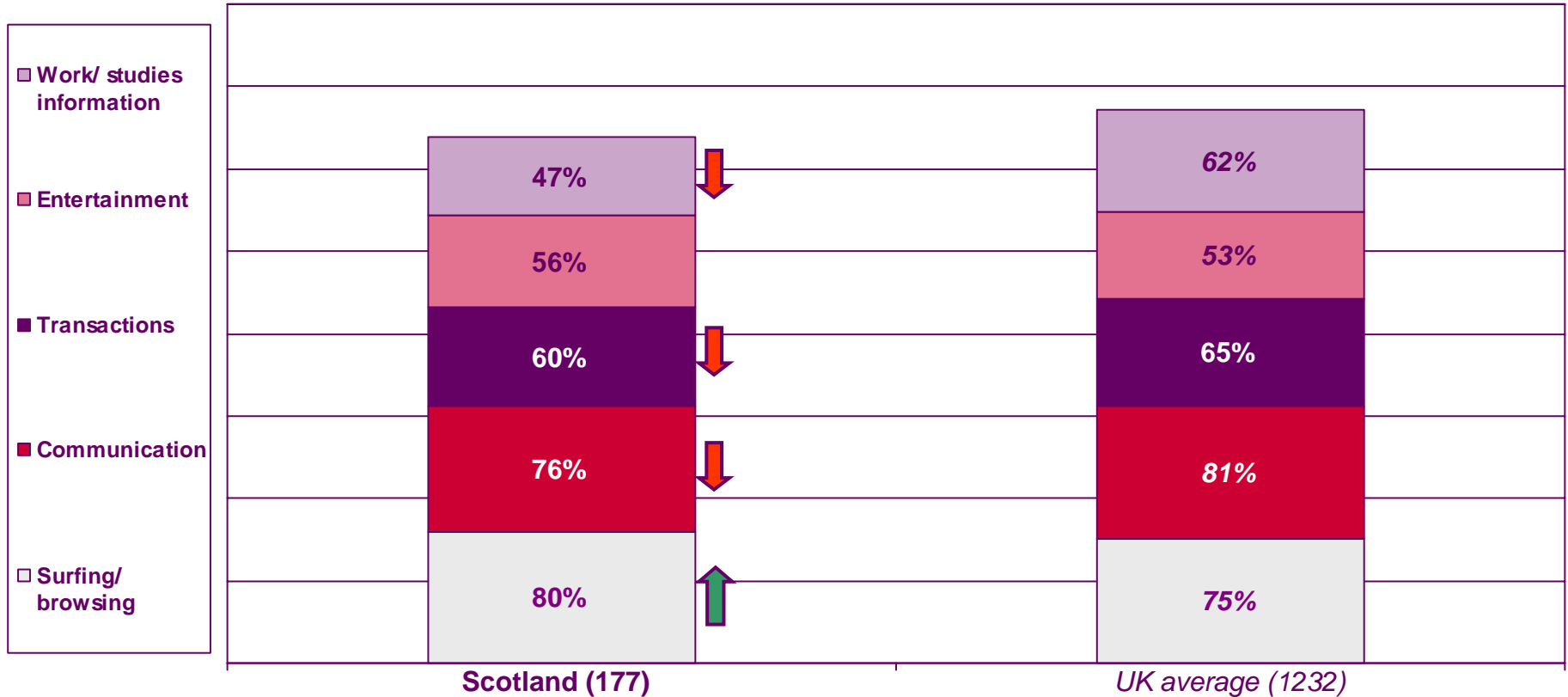
Base : All respondents in Scotland 2005 (460) and 2004 (426)

- Amongst consumers in Scotland, 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
- Compared to the UK average, mobile phone owners in Scotland are more likely to send and receive text message and less likely to take photos or videos with their phone



↓ ↑ Indicates significantly lower or higher than 2005 UK average

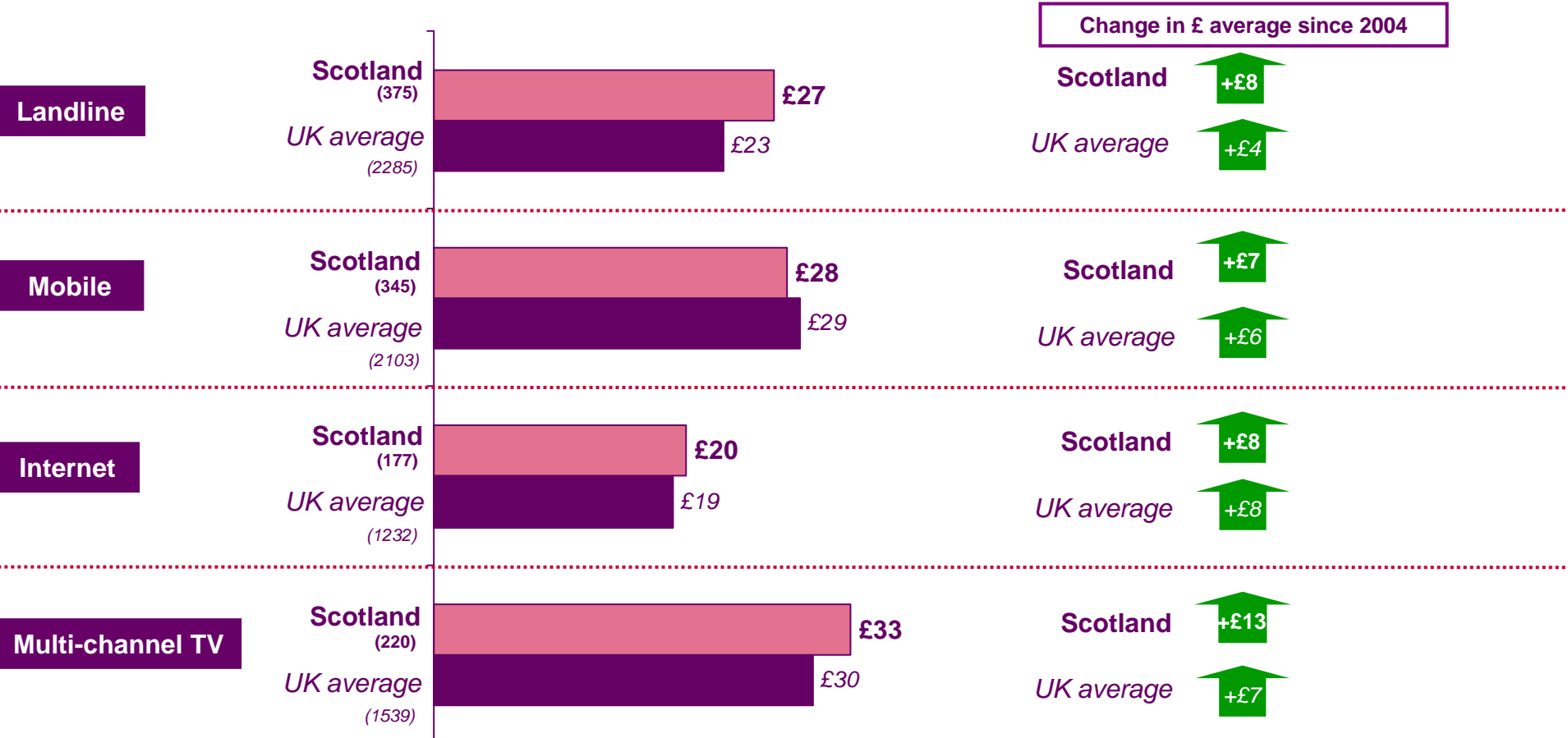
- Amongst consumers in Scotland, those with internet access at home make a narrower use of the internet compared to the UK average, with lower use of the internet for communication (e.g. email, Instant Messaging), transactions (e.g. banking, shopping online), and finding/ downloading information for work/ studies
- 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 Scotland to make this comparison



Base : All with internet access at home

↓ ↑ Indicates significantly lower or higher than 2005 UK average

- Amongst owners of each type of device/ service in Scotland the average self-reported monthly spend is broadly similar to the UK average
- As with the UK as a whole, the average monthly spend for consumers in Scotland has increased compared to 2004. The increase in internet spend is likely to have been affected by the increase in the use of broadband in Scotland; with broadband users generally spending more than dial-up users.



Base : Owners of each type of device/ service



Landline (375)

- 27% have any concerns or worries (30% for UK)
- 24% costs
- 3% privacy (unsolicited calls)

Higher level of reported concerns amongst those in low income households & those not working

Increased from 17% with any concerns or worries in 2004

Mobile phone (302)

- 22% have any concerns or worries (31% for UK)
- 14% costs
- 3% choice/ access/ coverage
- 3% health issues

Higher level of reported concerns amongst younger owners & those not working

No real change from 21% with any concerns or worries in 2004

Internet (152)

- 37% have any concerns or worries (41% for UK)
- 31% spam/ pop-ups/ viruses/ control
- 19% security

Base too low to report on differences

No real change from 41% with any concerns or worries in 2004

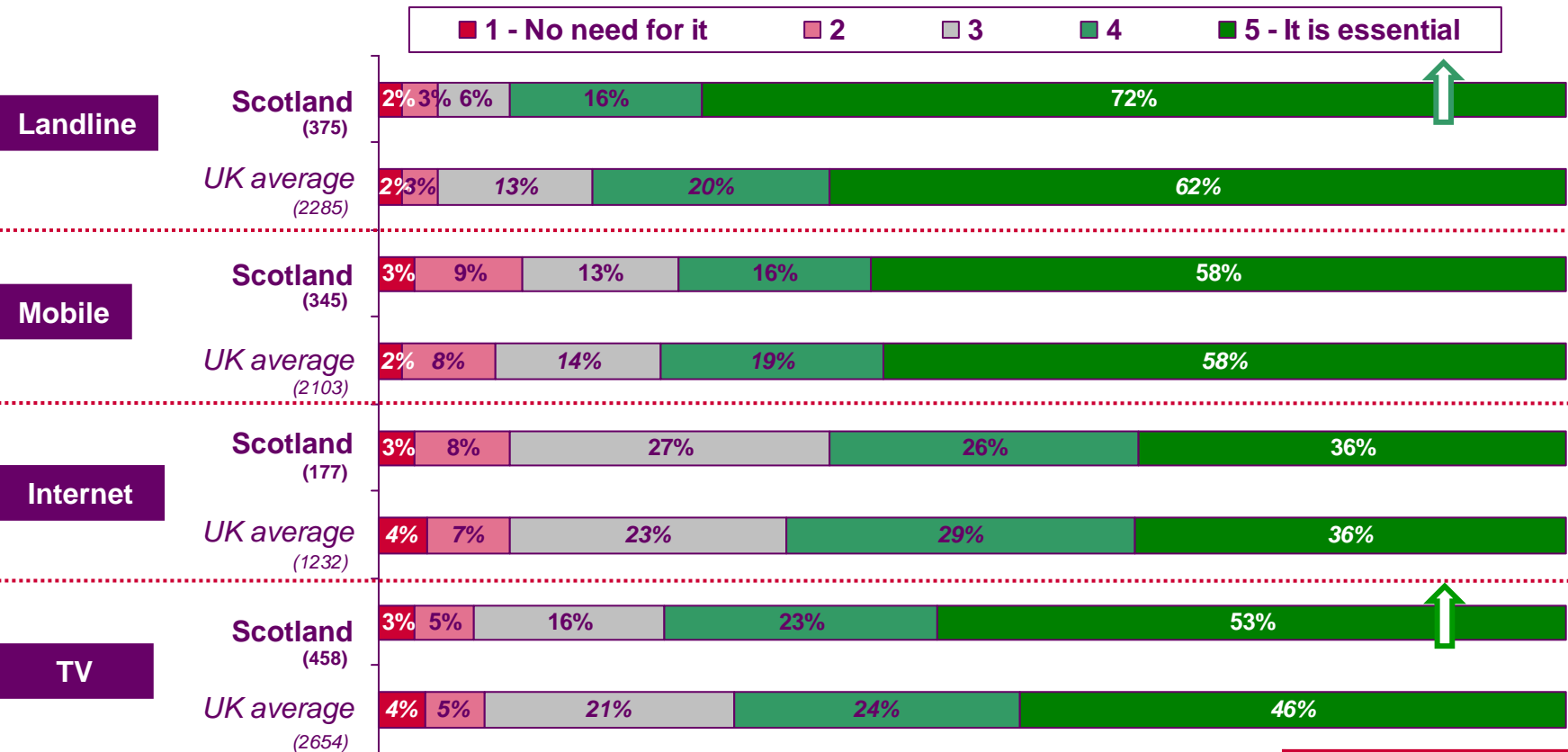
Digital TV (298)

- 16% have any concerns or worries (24% for UK)
- 10% costs
- 6% content/ programming
- 6% choice/ access

Higher level of reported concerns amongst those in low income households & those in rural areas

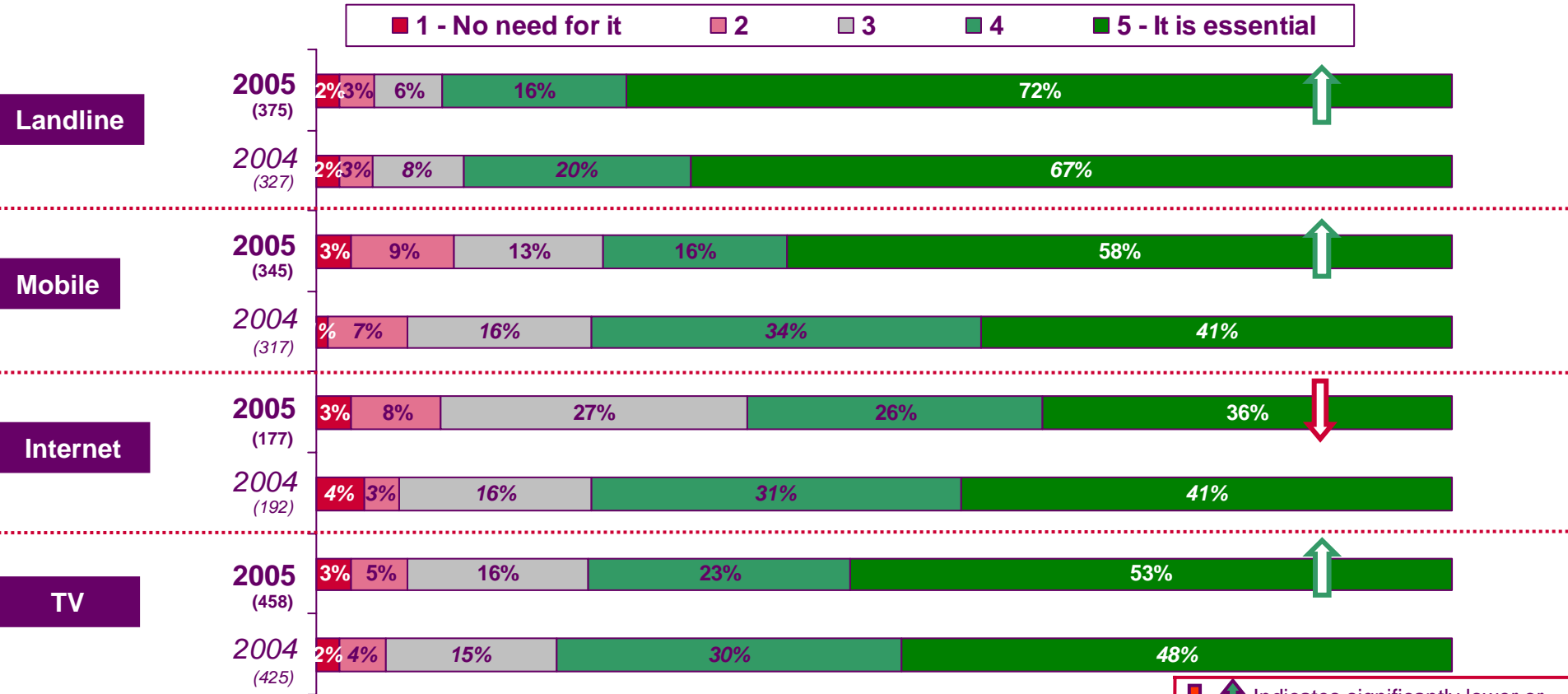
No real change from 14% with any concerns or worries in 2004

- Amongst owners of each type of device/ service in Scotland, landline 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 Scotland are more likely to consider their landline service and their TV service to be essential, with older consumers aged 65 and over more likely to rate these services as essential



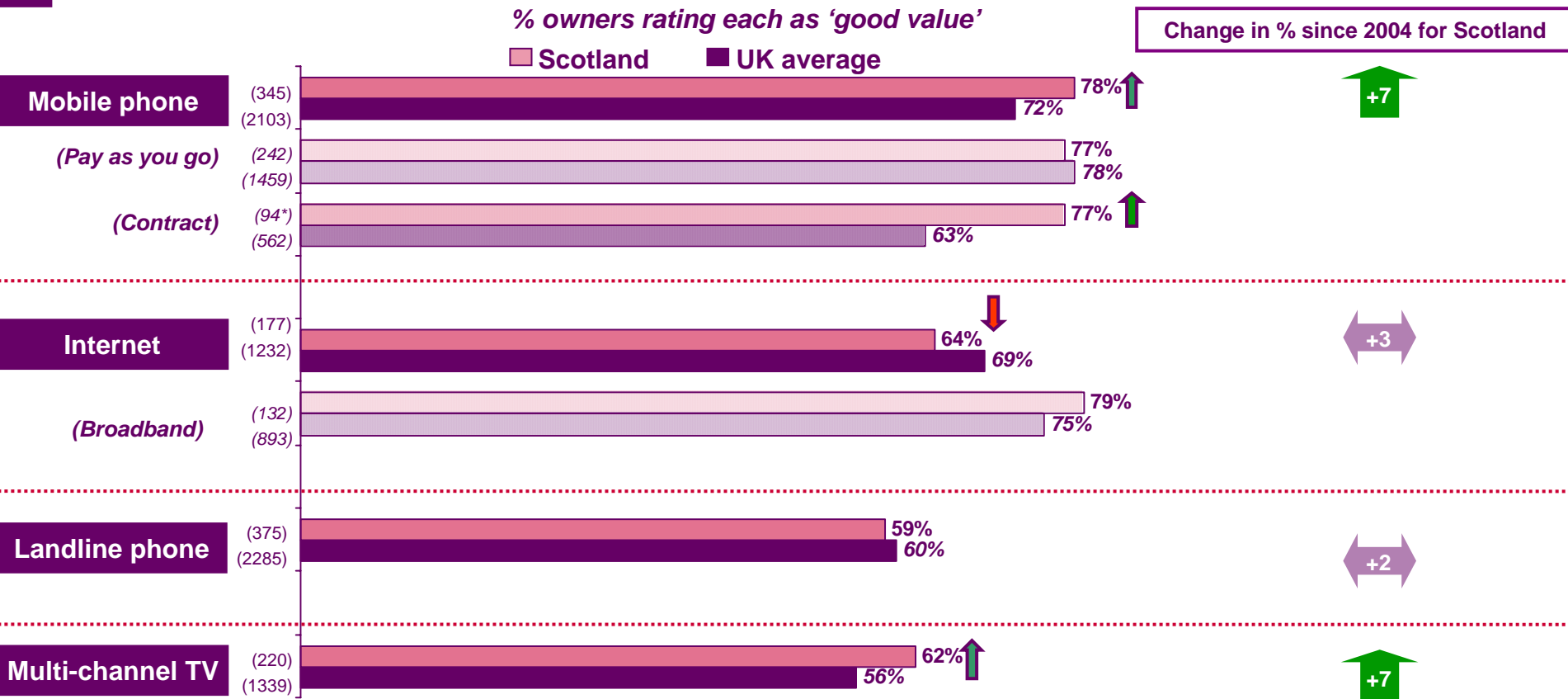
↑ ↓ Indicates significantly lower or higher than 2005 UK average

- Compared to 2004, owners in Scotland are more likely to consider their landline service, mobile phone service and TV service to be essential. The proportion of owners who consider their internet service to be essential has decreased compared to 2004.
- 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 Scotland are different in respect of landlines. The UK as a whole sees no change in the importance of the internet and TV services.



↑ ↓ Indicates significantly lower or higher than 2004 Scotland

- The mobile phone service is most likely to be rated as providing good value by owners of each type of device/ service in Scotland, and by more owners than the UK average, in particular those with a contract for their phone
- Users of internet, landline and TV services perceive broadly similar levels of 'good value' from these services, with ratings lower for internet and higher for TV compared to the UK average. Mobile phone and TV services show significant positive shifts in being rated as 'good value' since 2004



*NB Low base size - treat as indicative only

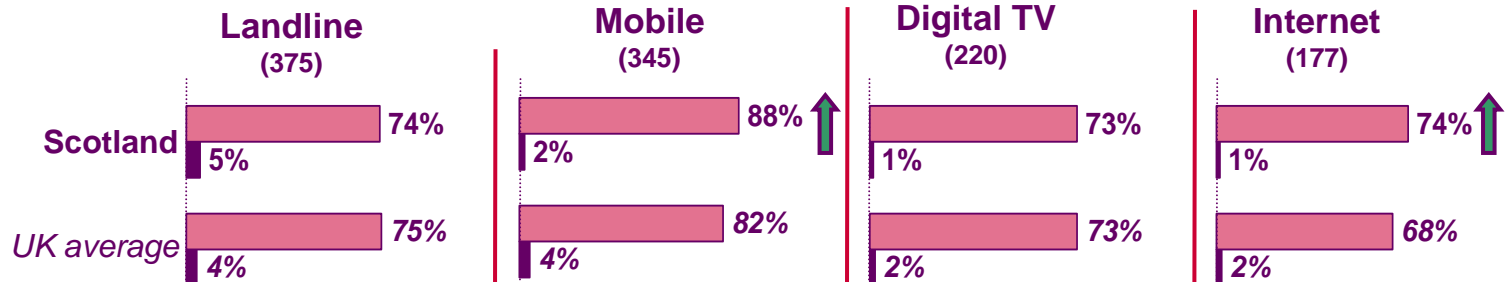
Base: Owners of each type of device/ service

↑ ↓ Indicates significantly lower or higher than 2005 UK average

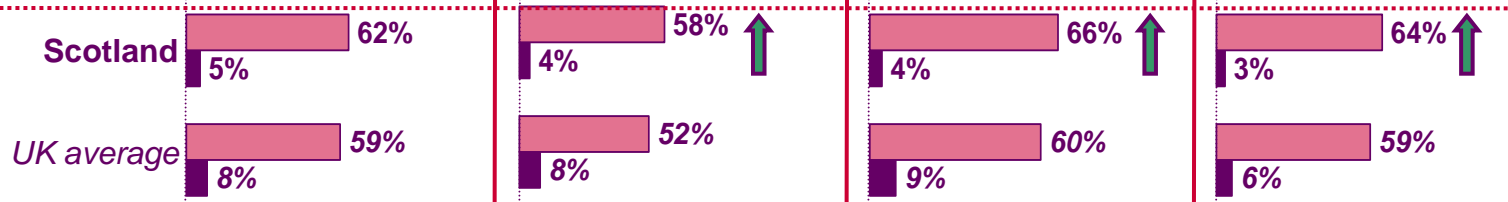
- Three quarters or more of owners of each type of service/ device in Scotland are satisfied with the overall service provided, with very few dissatisfied
- Several aspects see higher satisfaction amongst those in Scotland compared to the UK average, with fewer indicating any dissatisfied for each service
- Lowest satisfaction regarding 'Your supplier making sure you are on the best of their deals for you', as for the UK overall

■ Satisfied
■ Dissatisfied

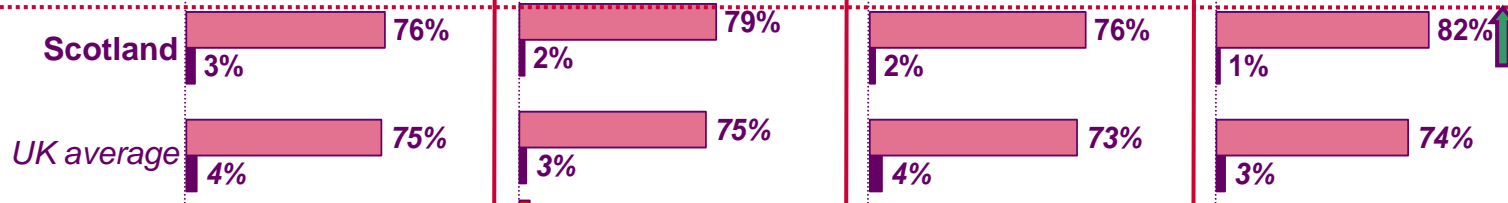
Understanding bills



Supplier making sure you're on best deal



Overall service



ANY DISSATISFACTION

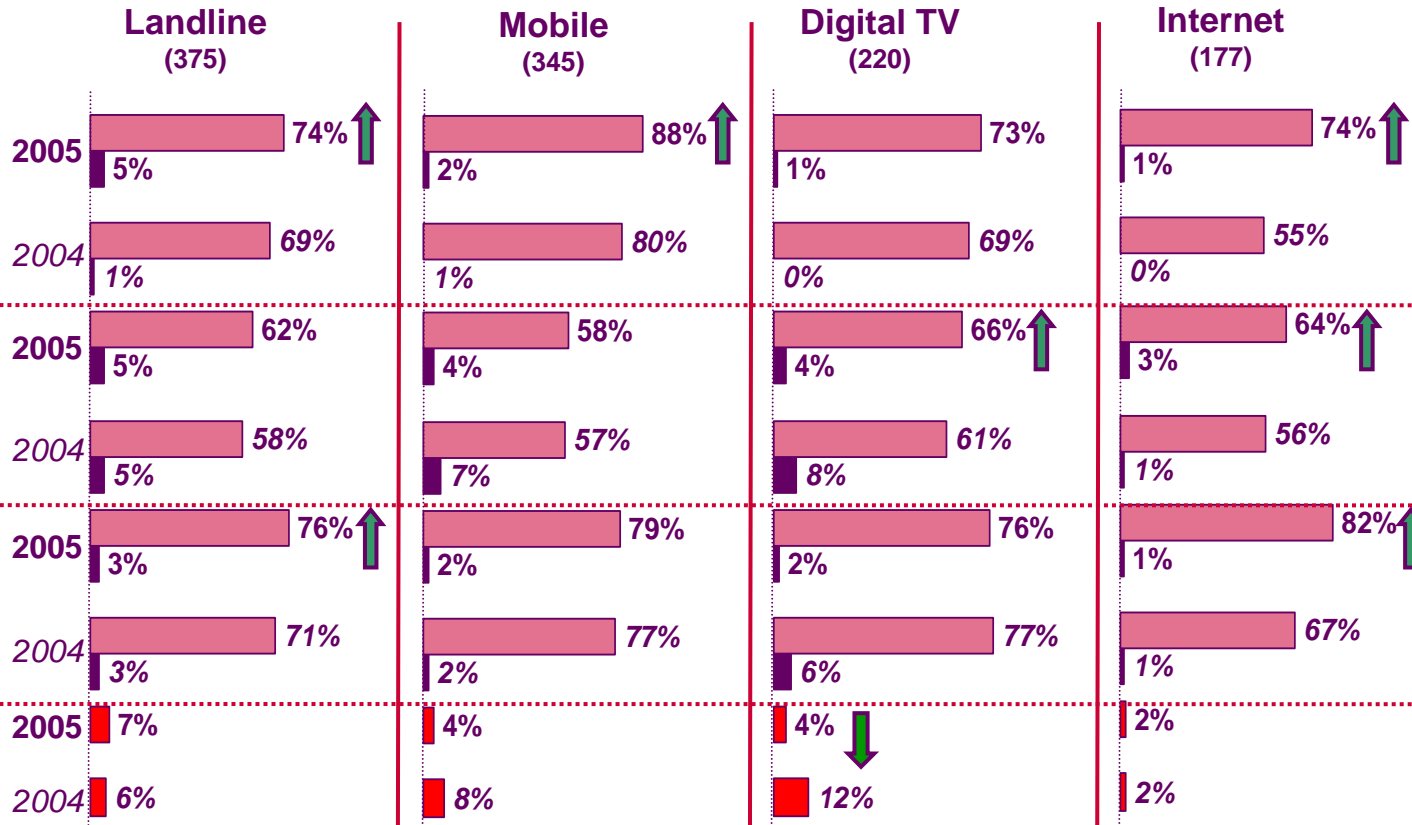


↑ ↓ Indicates significantly lower or higher than 2005 UK average

- Amongst consumers in Scotland, services see an increase in satisfaction for 'Understanding bills' except mobile phone. Internet services see 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 in this respect for TV and internet services

■ Satisfied
■ Dissatisfied

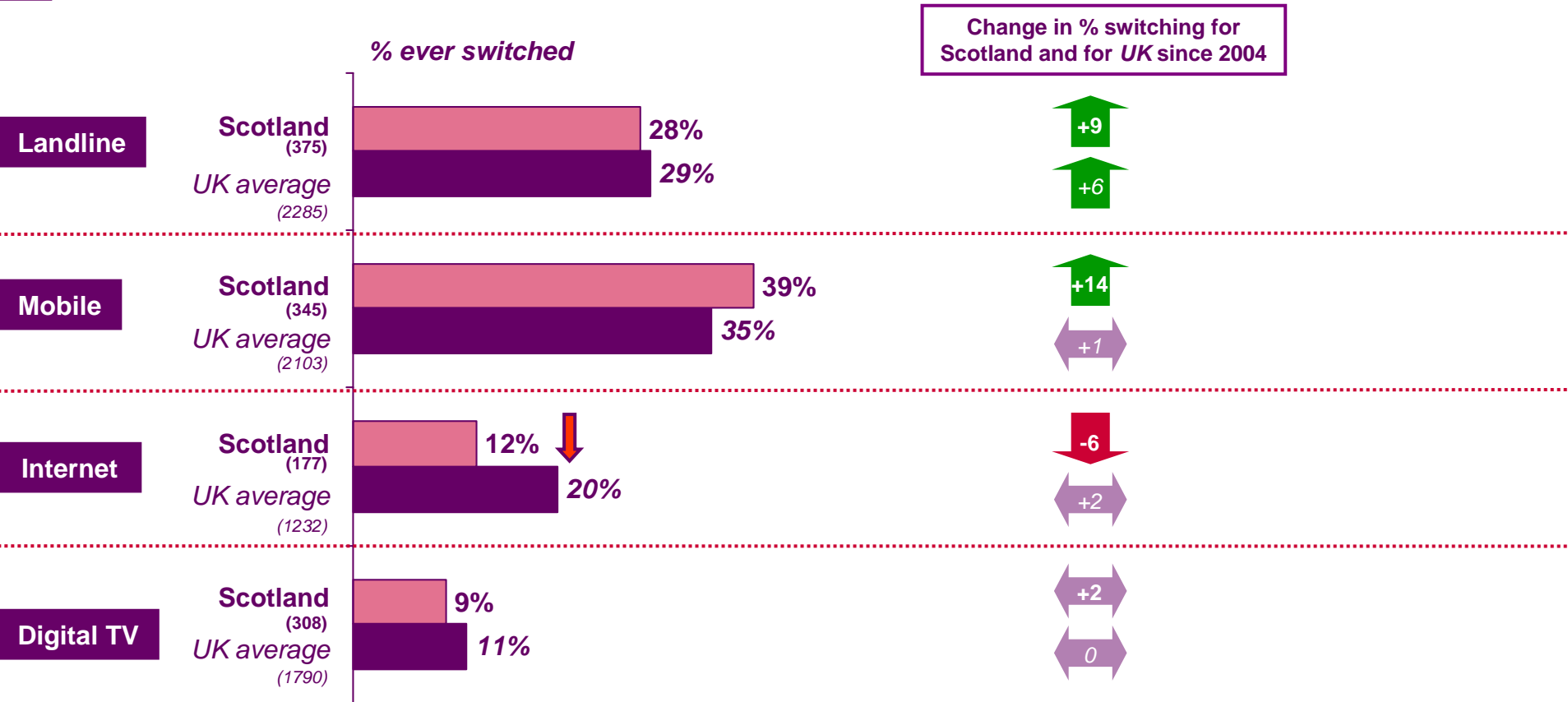
Understanding bills



↑ ↓ Indicates significantly lower or higher than 2004 Scotland

- Consumers in Scotland 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 these telephony services has increased since 2004
- Experience of switching internet service suppliers is lower in Scotland compared to the UK overall, and has fallen amongst internet users since 2004. This may be due to no overall increase in taking up the internet, with users switching to broadband with the same supplier.

Switching

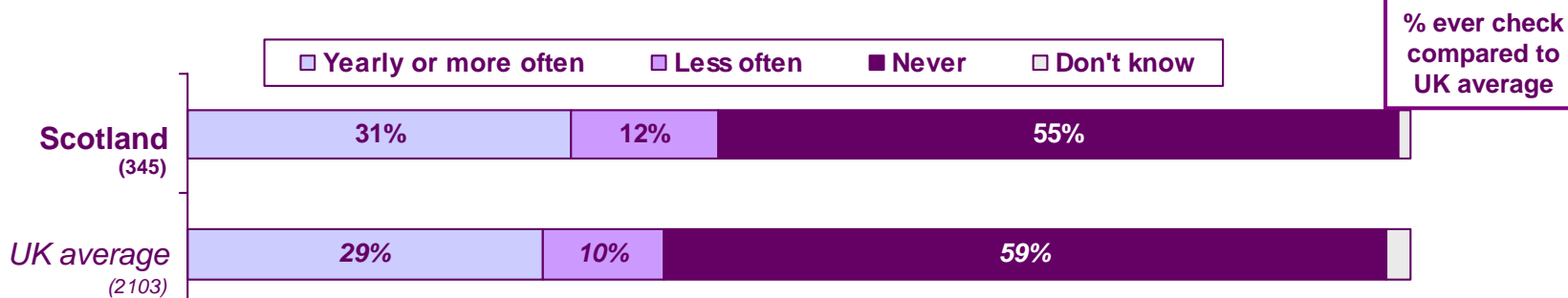


↑ Indicates significantly lower or higher than 2005 UK average

Usage

- Around two in five consumers in Scotland with a mobile phone ever check whether they are on the best tariff or deal, broadly similar to UK overall
- Those with a contract for their mobile phone are significantly more likely to ever check, with contract users in Scotland more likely than the UK average

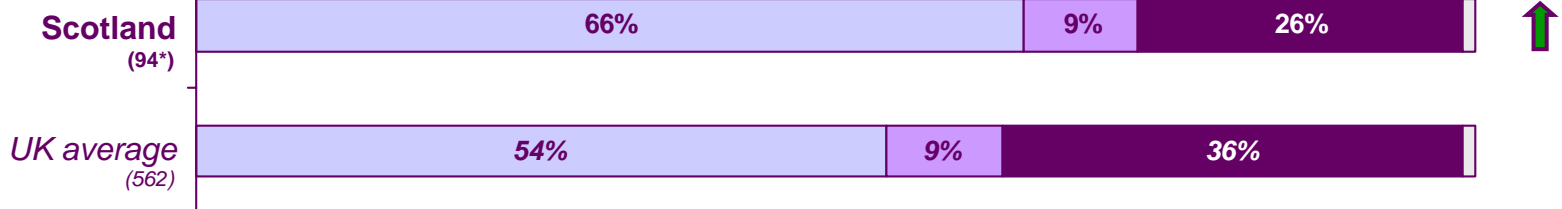
All mobile



Prepay



Contract



↓ ↑ Indicates significantly lower or higher than 2005 UK average

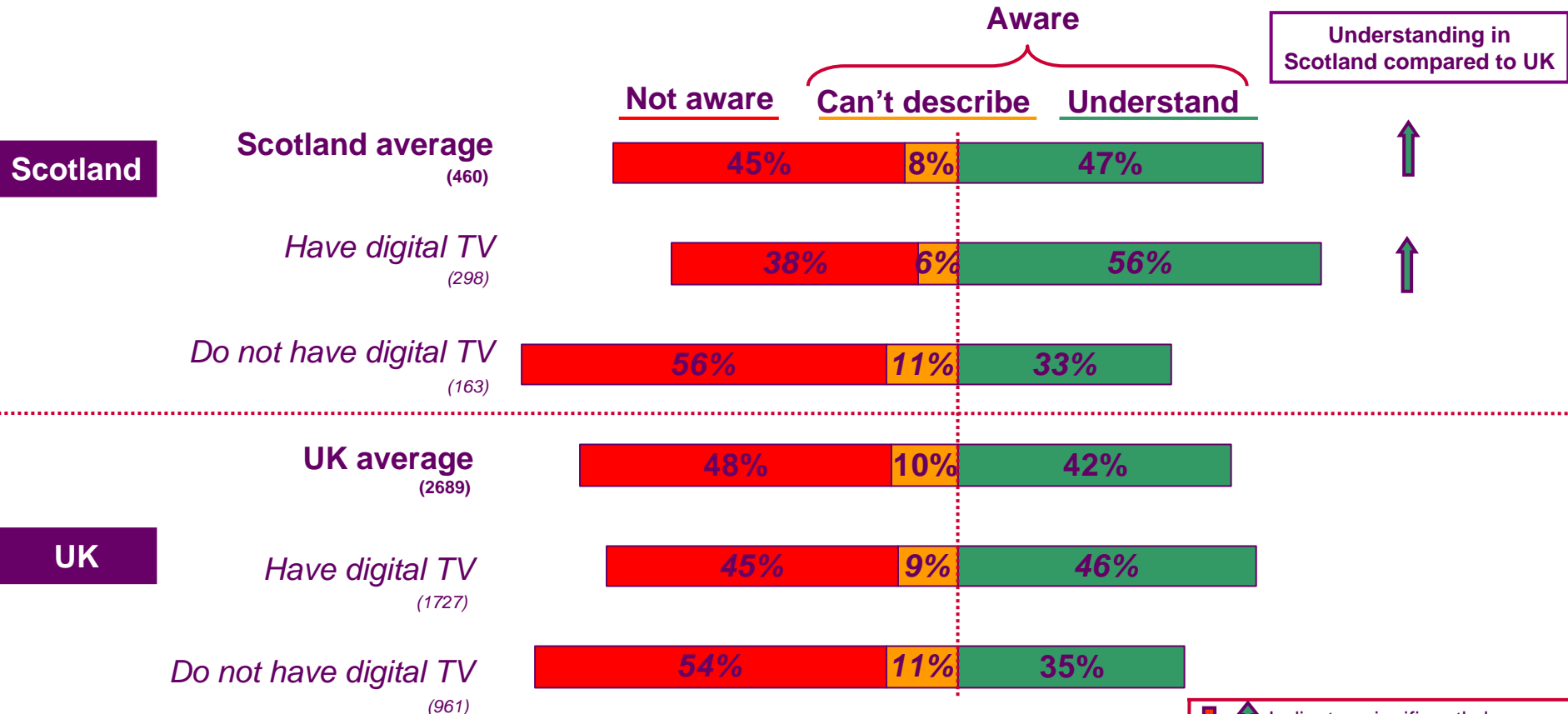
*NB Low base size – treat as indicative only
Base: All who use a mobile phone

CONSUMER PANEL

Awareness and understanding of Digital switchover - comparison to UK

DSO

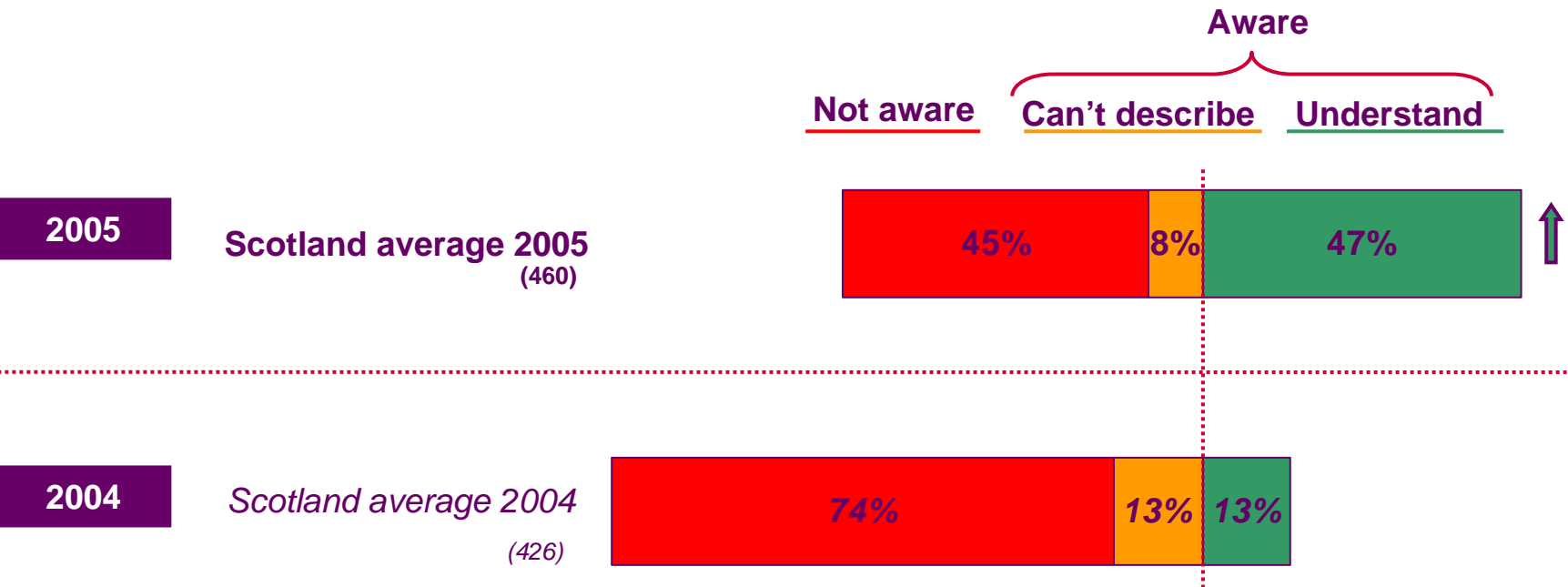
- Half of all consumers in Scotland have heard the term digital switchover and are able to describe what the term refers to ('Understand'), this measure exceeding the UK average
- Those who already have digital TV are the most likely to understand digital switchover, and to a greater extent in Scotland than the UK average



Base : All respondents



- Understanding of the term digital switchover has increased significantly amongst consumers in Scotland compared to 2004; rising by 34% to account for 47% of all consumers in Scotland
- Understanding is lower amongst consumers in Scotland in low income households, the youngest and oldest adults, and (as shown previously) those who do not already have digital TV



↓ ↑ Indicates significantly lower or higher than 2004 Scotland