making communications work
for everyone

Consumer Engagement 2018

Produced by: Critical Research

Fieldwork: January to April 2018

Contents

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Section 1
Background, objectives, methodology

Background and objectives

In July 2017, Ofcom published a Call for Inputs launching a programme of work to help understand why some consumers may face difficulties engaging in communications markets; and to help identify, develop and implement solutions that help consumers to engage

Detailing the need for further research to understand more about consumer engagement with the market, the potential barriers and potential solutions

Seeking to understand why consumers do not engage fully or at all with the communications markets – including consumers in the mobile, dual play, triple play and standalone Pay TV markets

What might encourage less engaged consumers to participate more?

What might encourage those who perhaps do not want to switch to ‘engage’ in the market more generally?

Whether knowledge (or lack of) about their usage, technical terms, alternatives, complexity etc. impacts their ability to assess their current deal or find a better deal

Methodology

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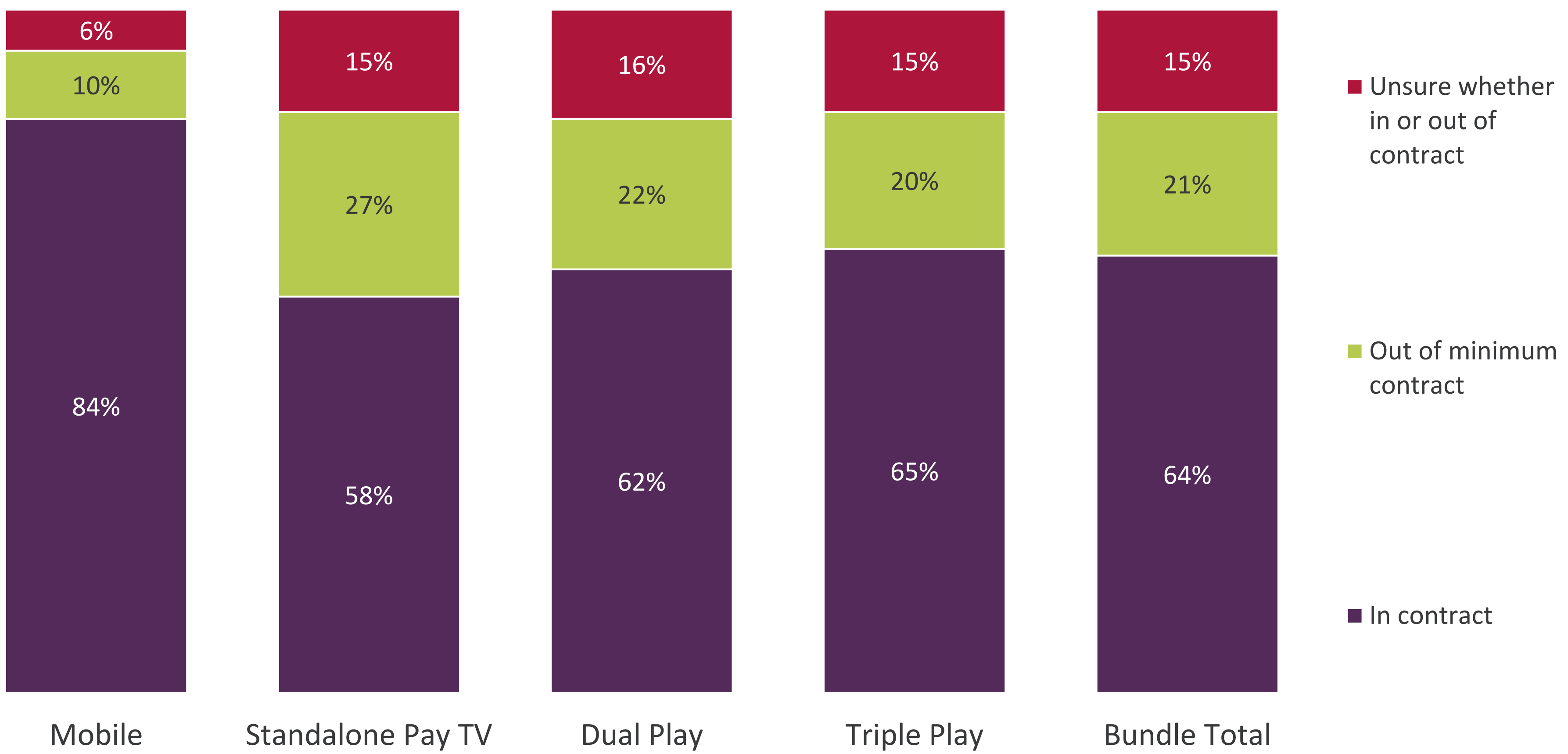
Sample	• 4,142 adults aged 16+ in the UK • Quotas set on service – minimum 1,000 in each of mobile, dual play, triple play and standalone Pay TV • Representative sample of decision makers per market
Data collection	• Face-to-face in-home interviews and online interviews • Conducted by Critical Research • Fieldwork from January to April 2018
Data reporting	• Weighted within market, based on profiles from Ofcom's Technology Tracker and due to the multi-modal approach. More information about the weighting approach can be found in the technical note • Data available in pdf tables (aggregated), SPSS and CSV (respondent level) • Significance testing applied at the 95% confidence level

Section 2
Overview per market

Around one-third of users of each service say they are out of their contract period or are unsure – mobile more likely to say they are in contract

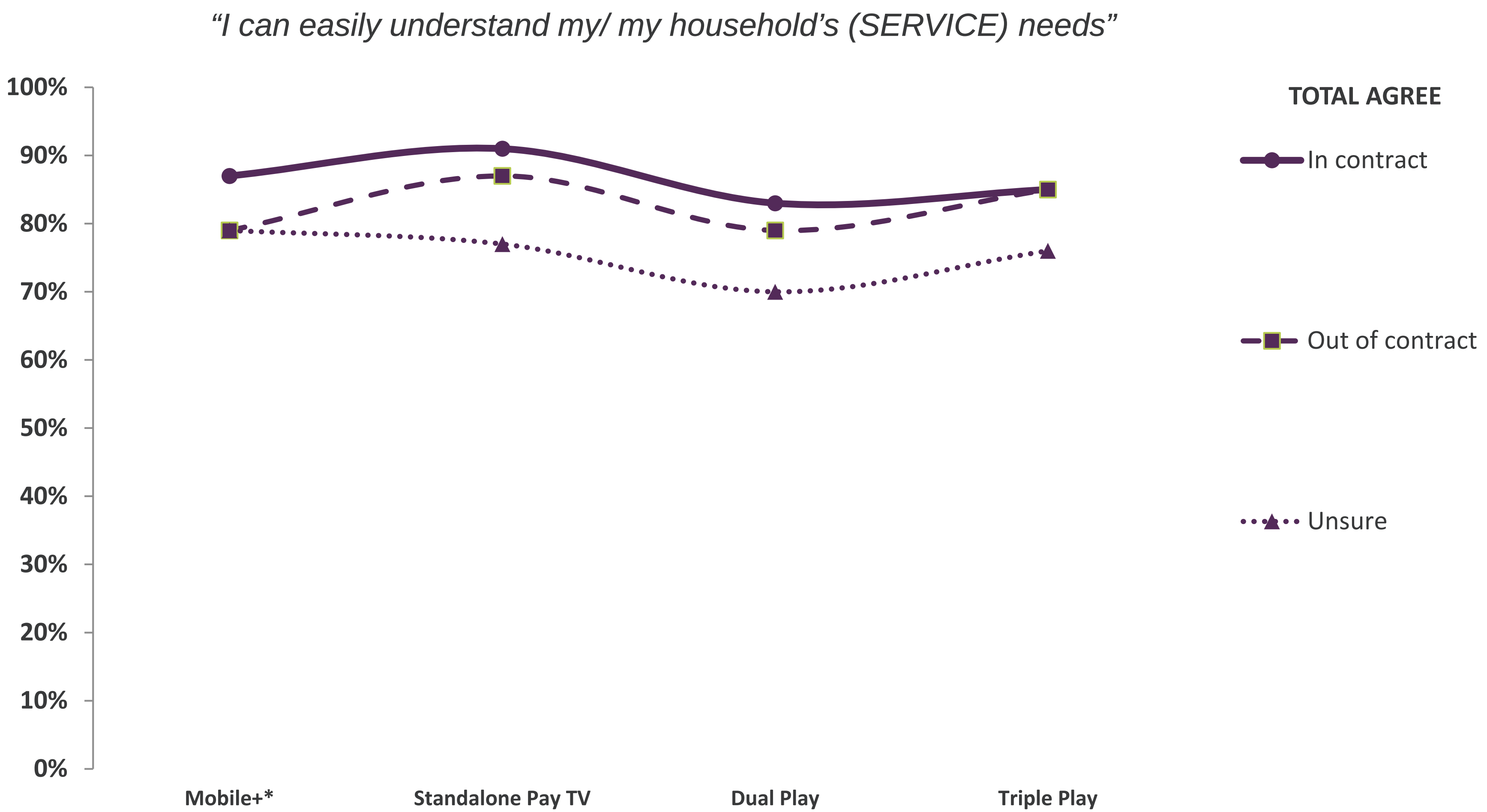
Awareness of when contract ends - by market



Source: Ofcom Consumer Engagement 2018
Q4. Which of the following best describes your awareness of when your contract with (PROVIDER) for your (SERVICE) ends?
Base: All except SIM only 30 day and Pay As You Go mobile (Mobile 675, Standalone Pay TV 946, Dual Play 1039, Triple Play 1021, Bundle Total 2060)
N.B. those who claimed to be in contract at Q4 but at Q6 said they were out of their MCP, have been re-coded into OOC on this chart.

Most agree they can easily understand their household's (SERVICE) needs, but this is lower among those unsure of the contract status

Attitudes towards comparing deals in each market – in contract, out of contract, unsure, by market



Source: Ofcom Consumer Engagement

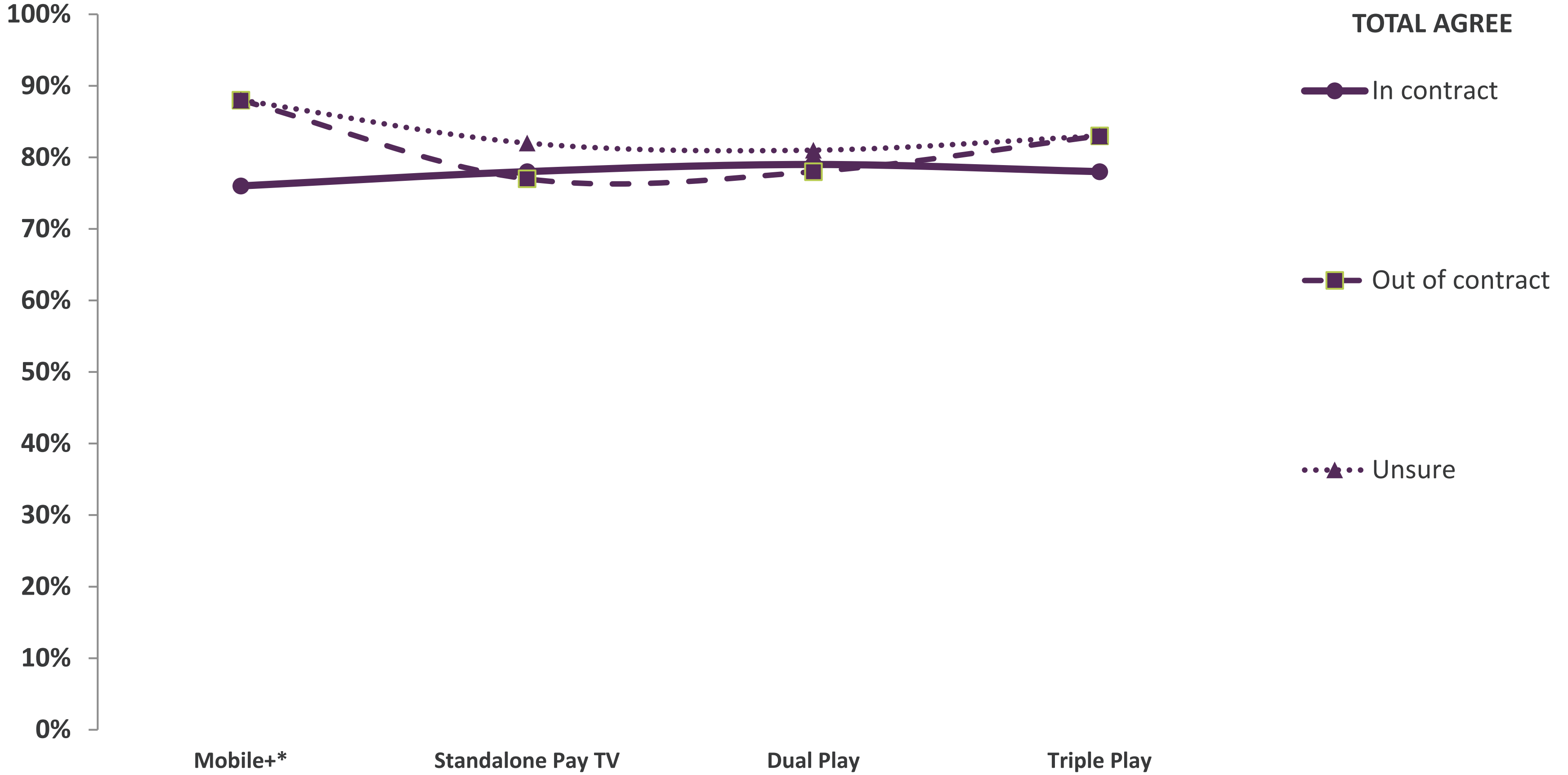
Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All in contract (Mobile 586, Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381). Dashed line shows those who think they are out of contract (Mobile 89+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378). Dotted line shows those who are unsure whether they are in contract (Mobile 89+*, Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301) *Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

Attitudes to using an unfamiliar provider do not vary by contract status – this is off-putting to a majority users of all services

Attitudes towards comparing deals in each market – in contract, out of contract, unsure, by market

"I would be wary of using a provider I had not heard of"



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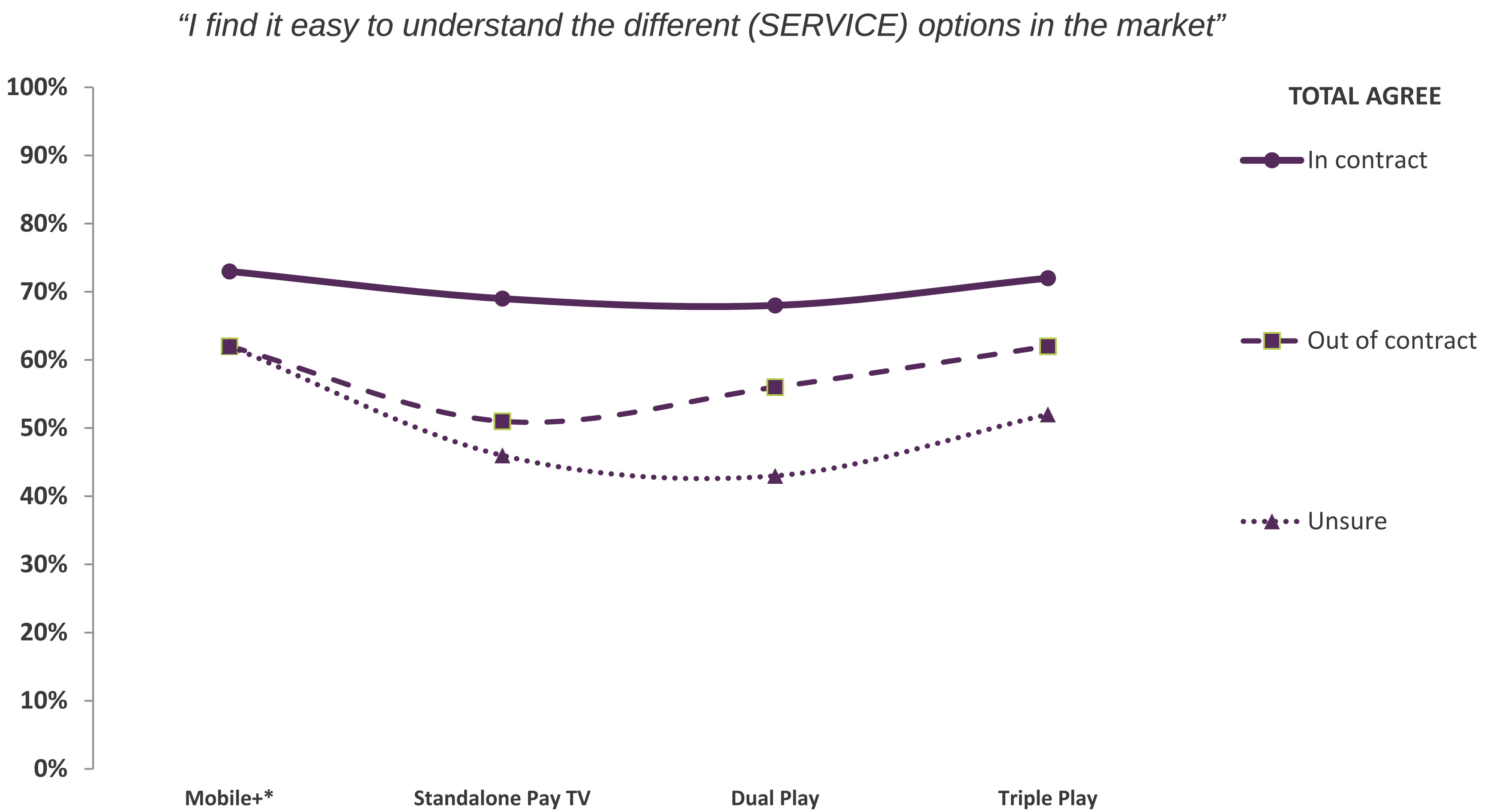
Those out of contract or unsure are less likely to find it easy to understand different (SERVICE) options in the market

Attitudes towards comparing deals in each market – in contract, out of contract, unsure, by market



Source: Ofcom Consumer Engagement

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Those out of contract or unsure are more likely to say that finding a better deal is not a priority

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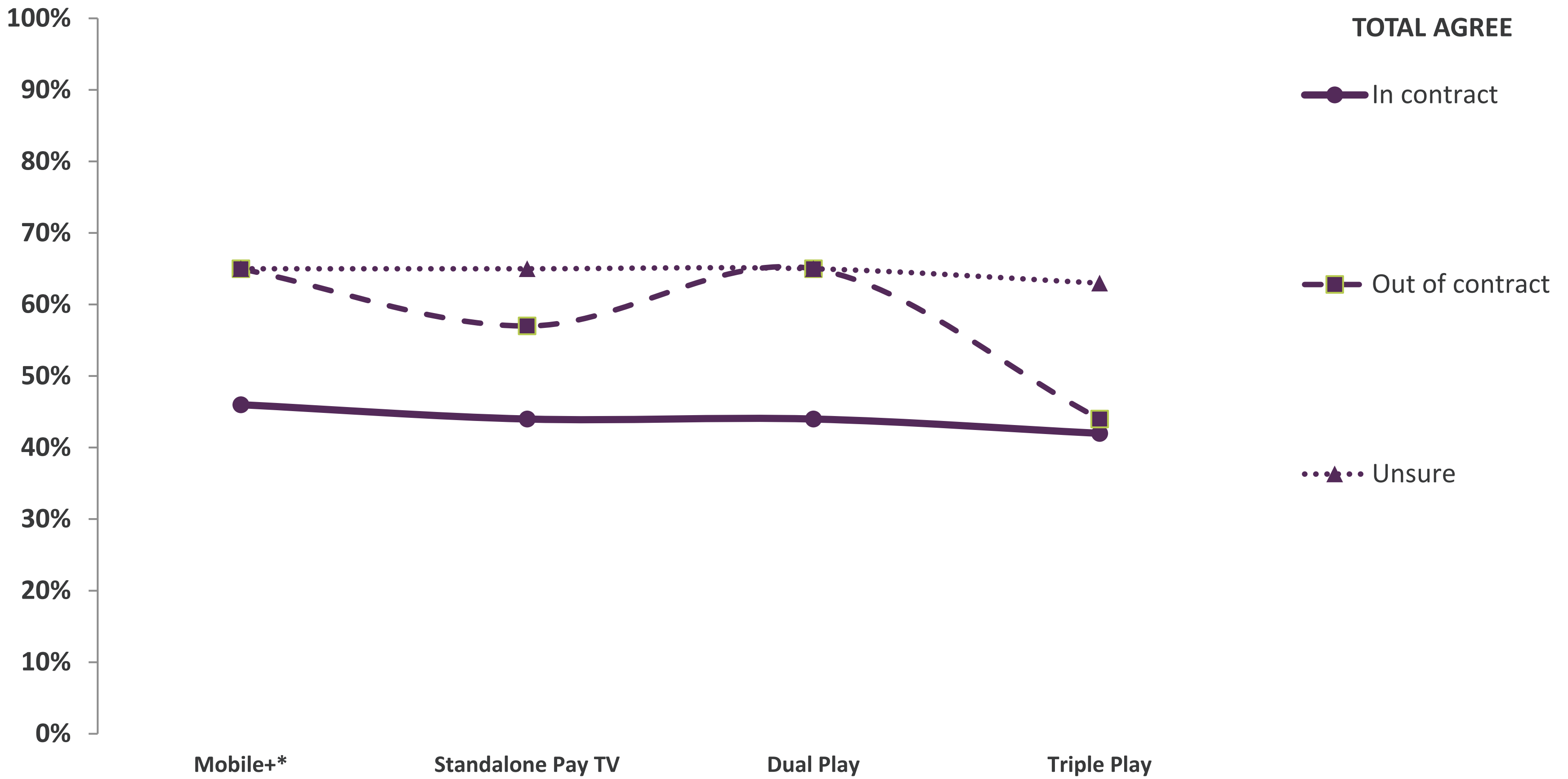
Attitudes towards comparing deals in each market – in contract, out of contract, unsure, by market

"Finding a better deal is not a priority for me"



Source: Ofcom Consumer Engagement

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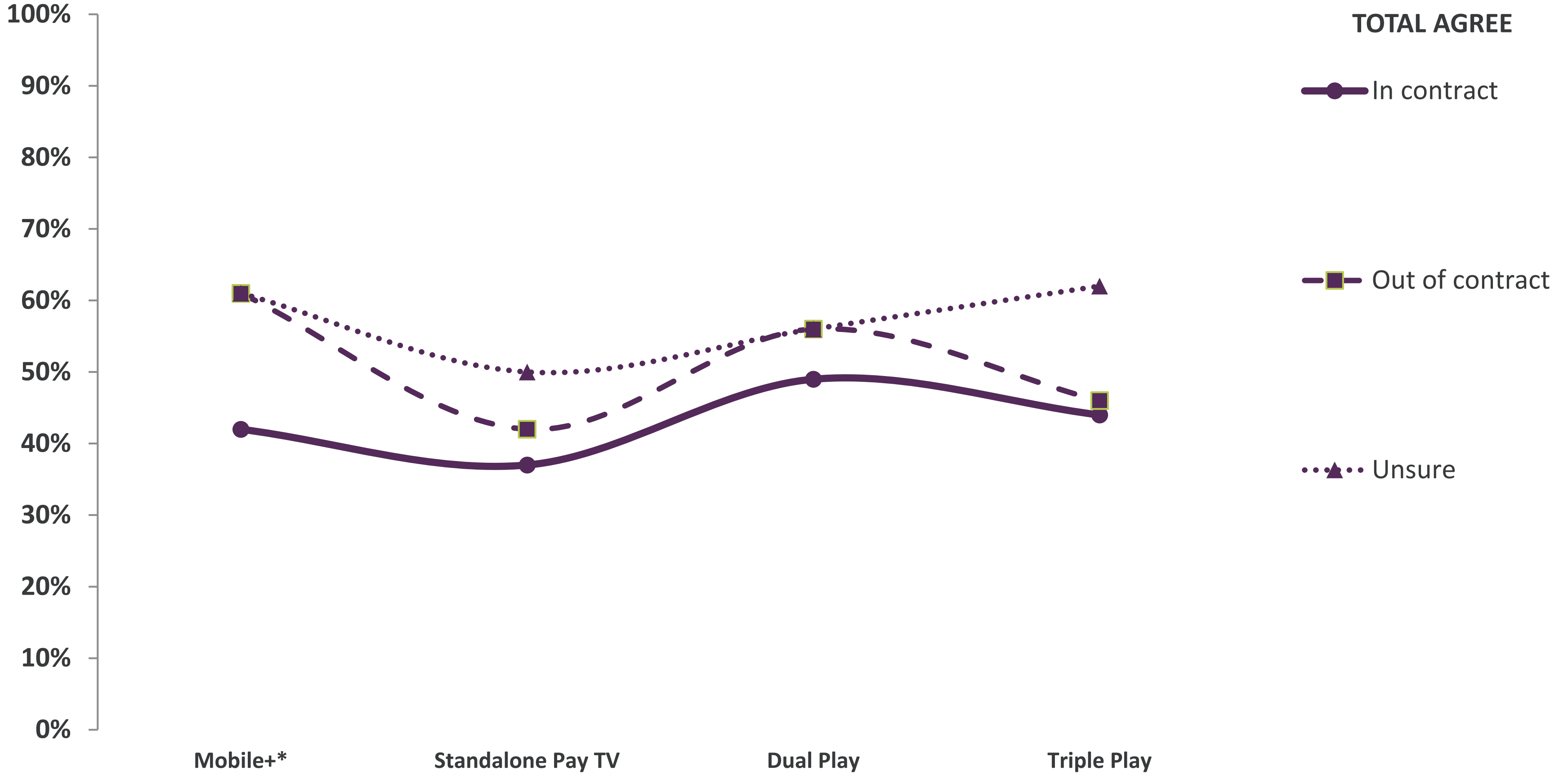
Those out of contract or unsure are more likely to say it's difficult to understand some (SERVICE) language and terminology

Attitudes towards comparing deals in each market – in contract, out of contract, unsure, by market

"I find it difficult to understand some of the language and terminology about the (SERVICE)"



Source: Ofcom Consumer Engagement

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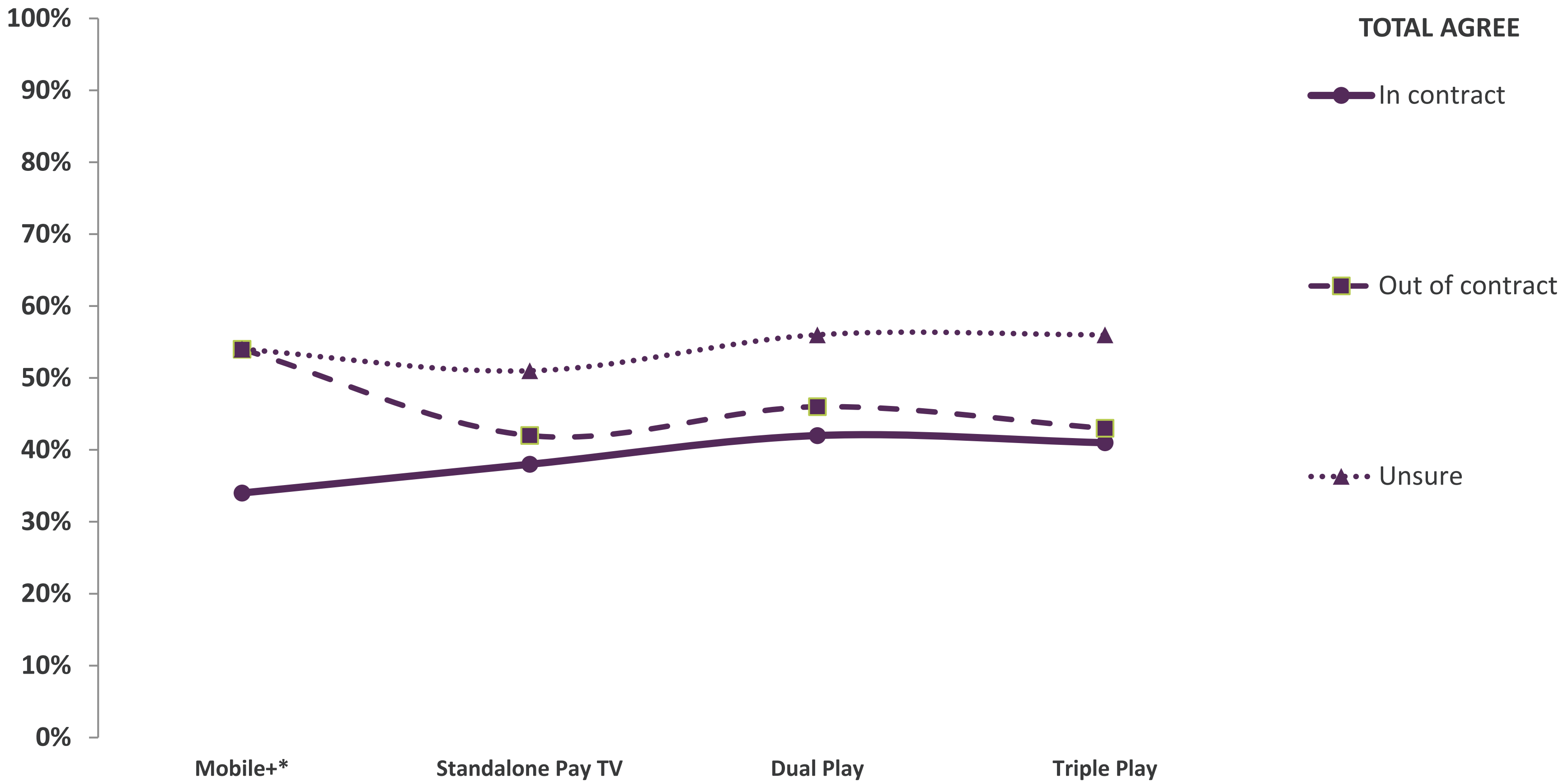
Those unsure of their contract status are more likely to say it's difficult to understand whether they would save by changing

Attitudes towards comparing deals in each market – in contract, out of contract, unsure, by market

"I find it difficult to understand whether or not I would make any saving by changing my deal or provider"



Source: Ofcom Consumer Engagement

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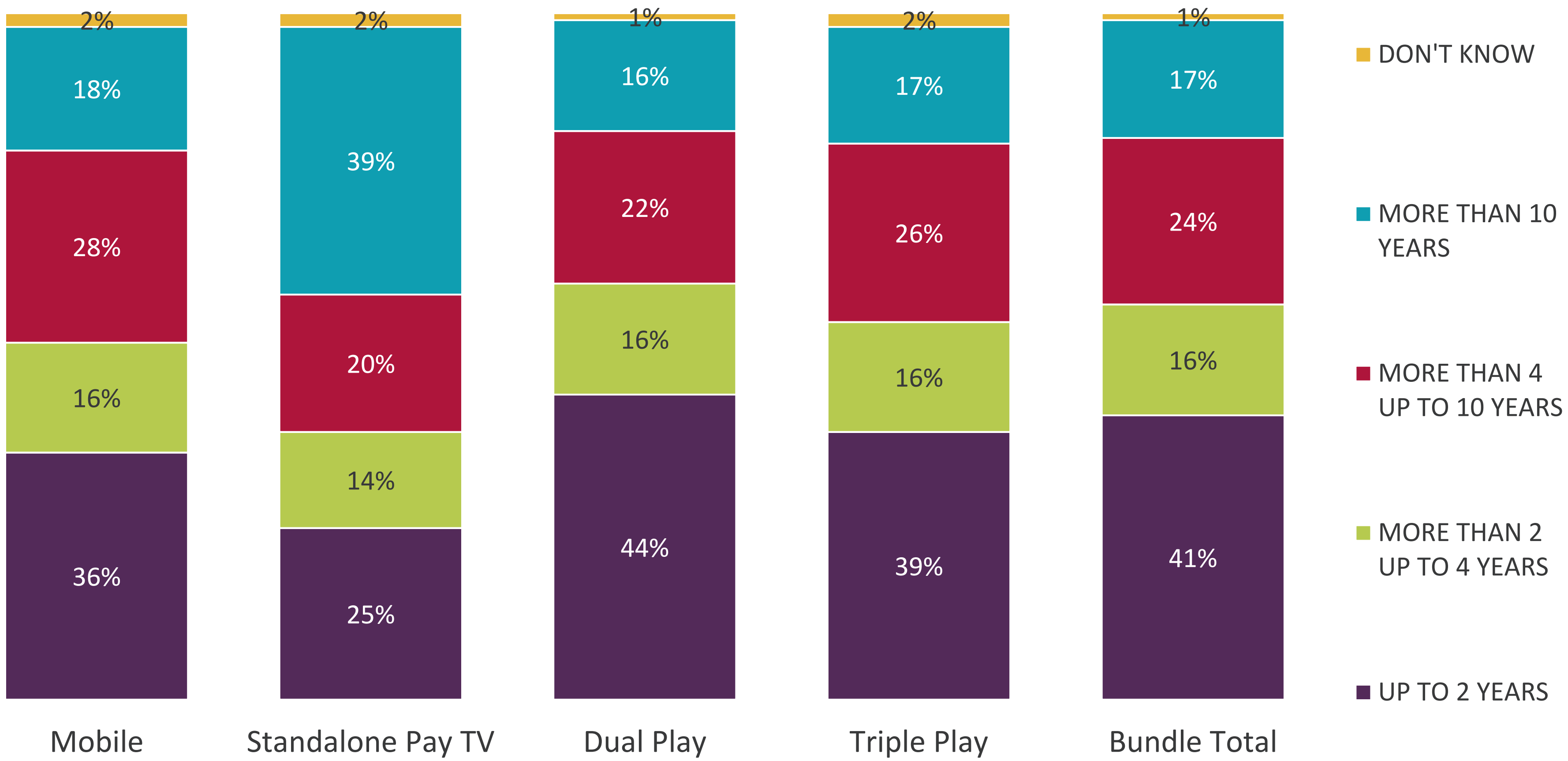
Figures among those who have 'little idea' of their contract end date: 44% standalone Pay TV (Base: 113), 54% dual (Base: 93*) and 51% triple (Base: 111). * Low base treat as indicative only.

Section 3
Contract knowledge

Most of those in contract have been with their (SERVICE) provider for over 2 years – longest for standalone Pay TV

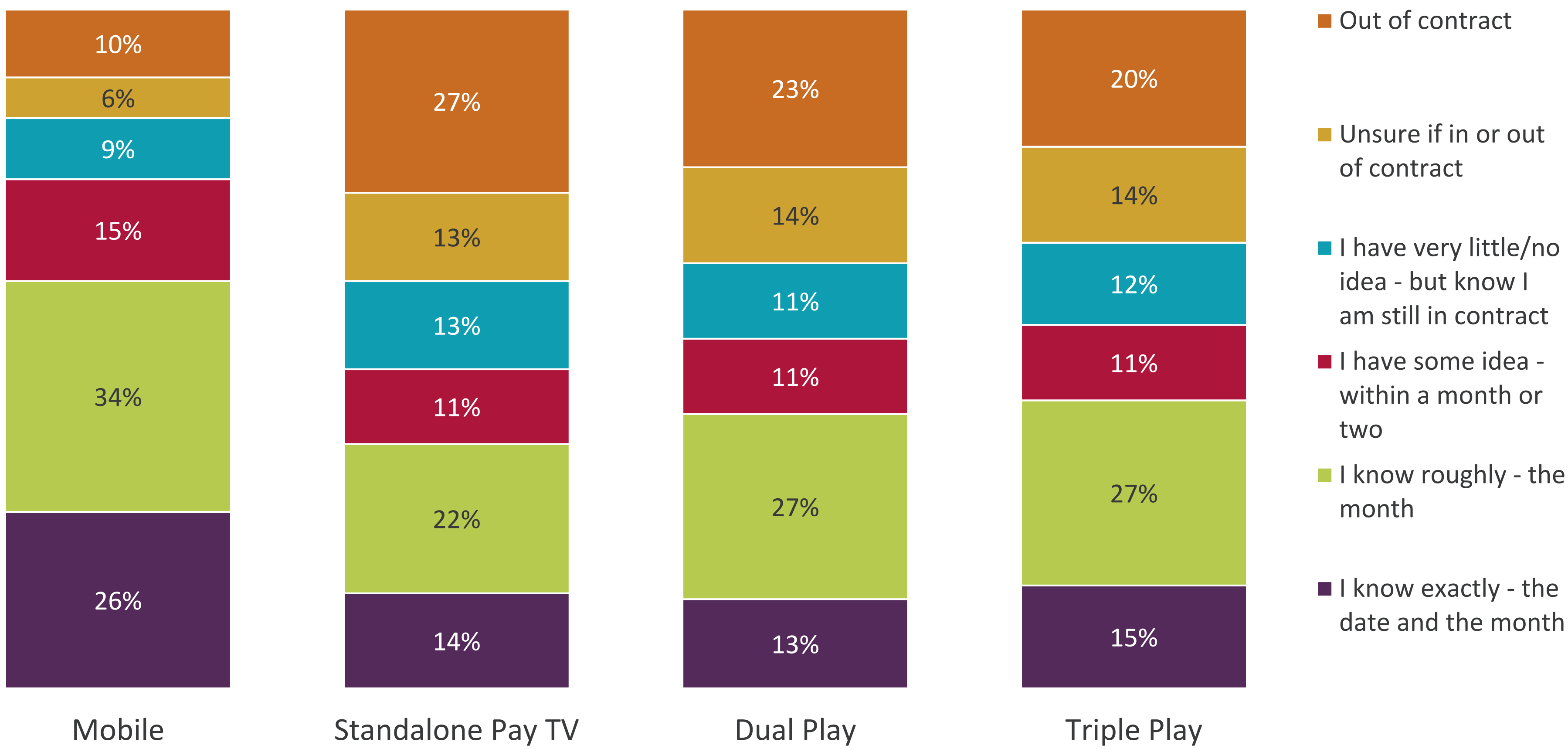
How long been with provider for service – in contract, by market



Source: Ofcom Consumer Engagement 2018
Q1. How long have you been with (PROVIDER) for your (SERVICE)? Please give your best estimate if you're not sure.
Base: All in contract for their service (Mobile 586, Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381)

Around a quarter of Standalone Pay TV, Dual play and Triple play are unsure of their contract status or have little idea or no idea of its end date.

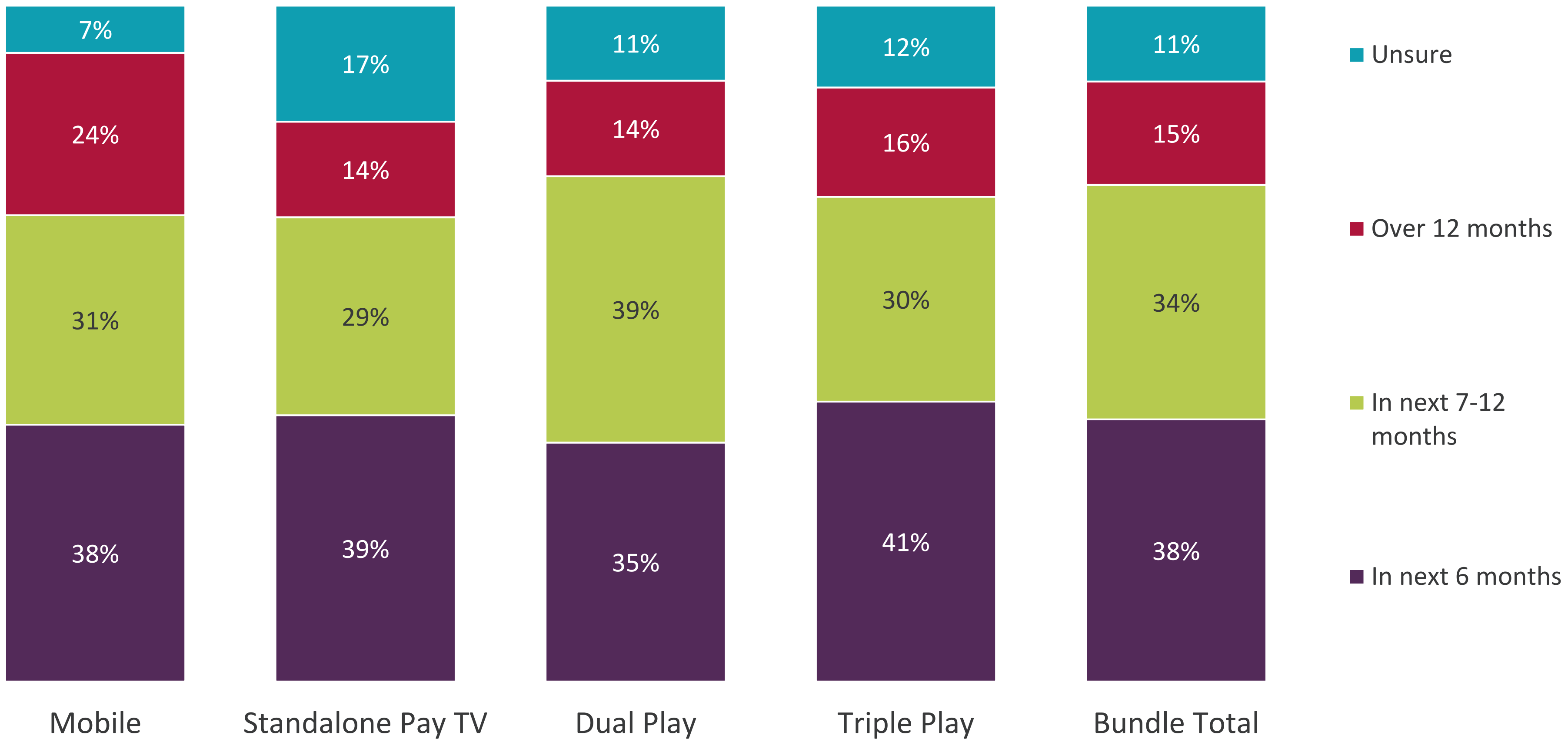
Awareness of contract status, by market



Source: Ofcom Consumer Engagement 2018
Q4. Which of the following best describes your awareness of when your contract with (PROVIDER) for your (SERVICE) ends?
Base: All except SIM only 30 day and Pay As You Go mobile (Mobile 675, Standalone Pay TV 946, Dual Play 1039, Triple Play 1021, Bundle Total 2060)
N.B. “Out of contract” includes those who said they were in contract at Q4, but at Q6 that they were out of their minimum contract term

Among those in contract, around two-thirds say their contract will end in the next 12 months

When contract will end – in contract, by market



Source: Ofcom Consumer Engagement 2018

Q6. How long do you have to go until your contract/s with (PROVIDER) for your (SERVICE) ends? NB - Chart shows the contract that will end earliest for those with non-coterminous contracts for dual play or triple play

Base: All in contract (Mobile 554, Standalone Pay TV 569, Dual Play 663, Triple Play 679, Bundle Total 1342)

Under one fifth in each market have ever tried to find their contract end date, but virtually all who have looked have been successful

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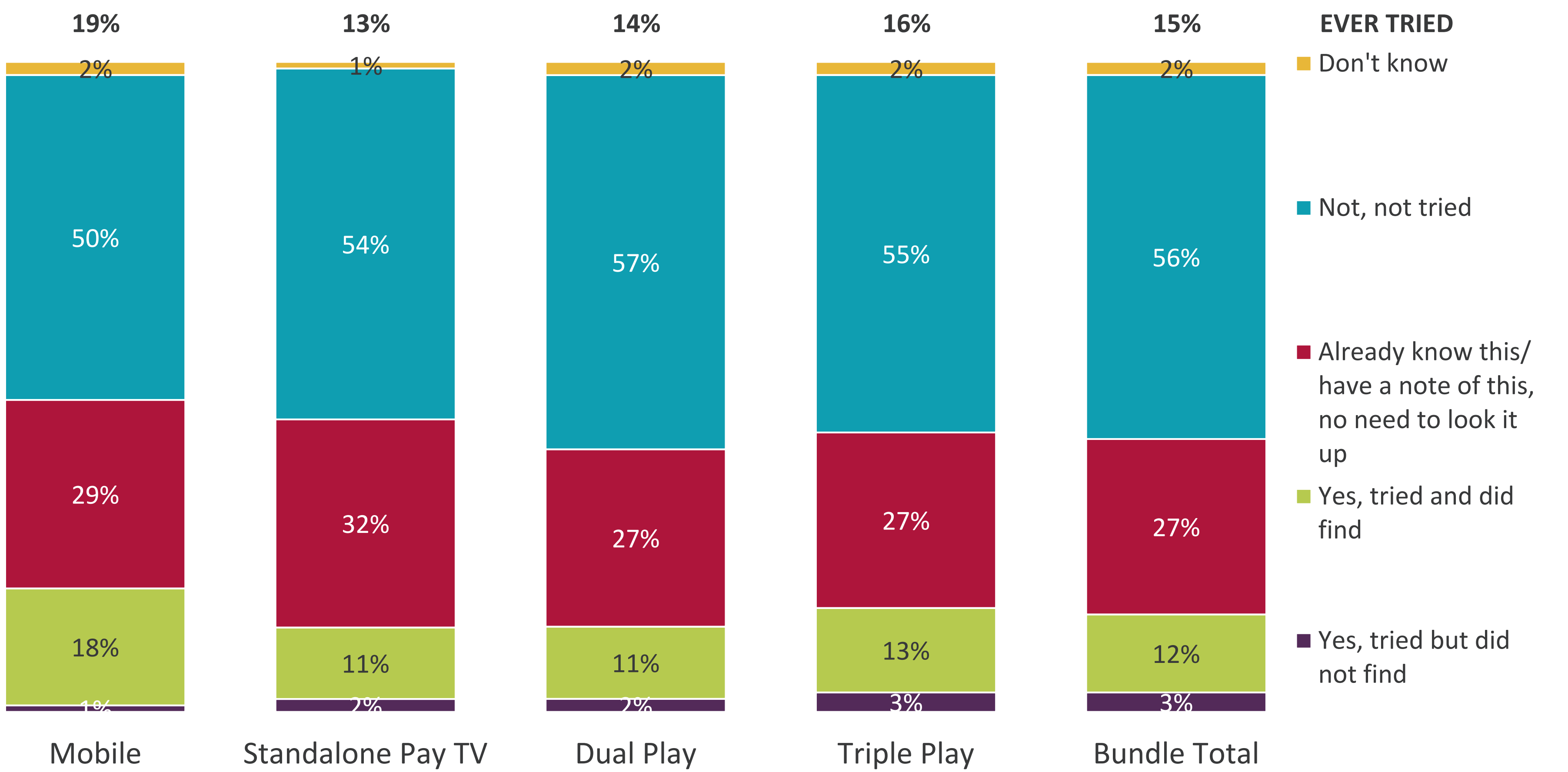
Whether ever tried to find contract end date – in contract, by market



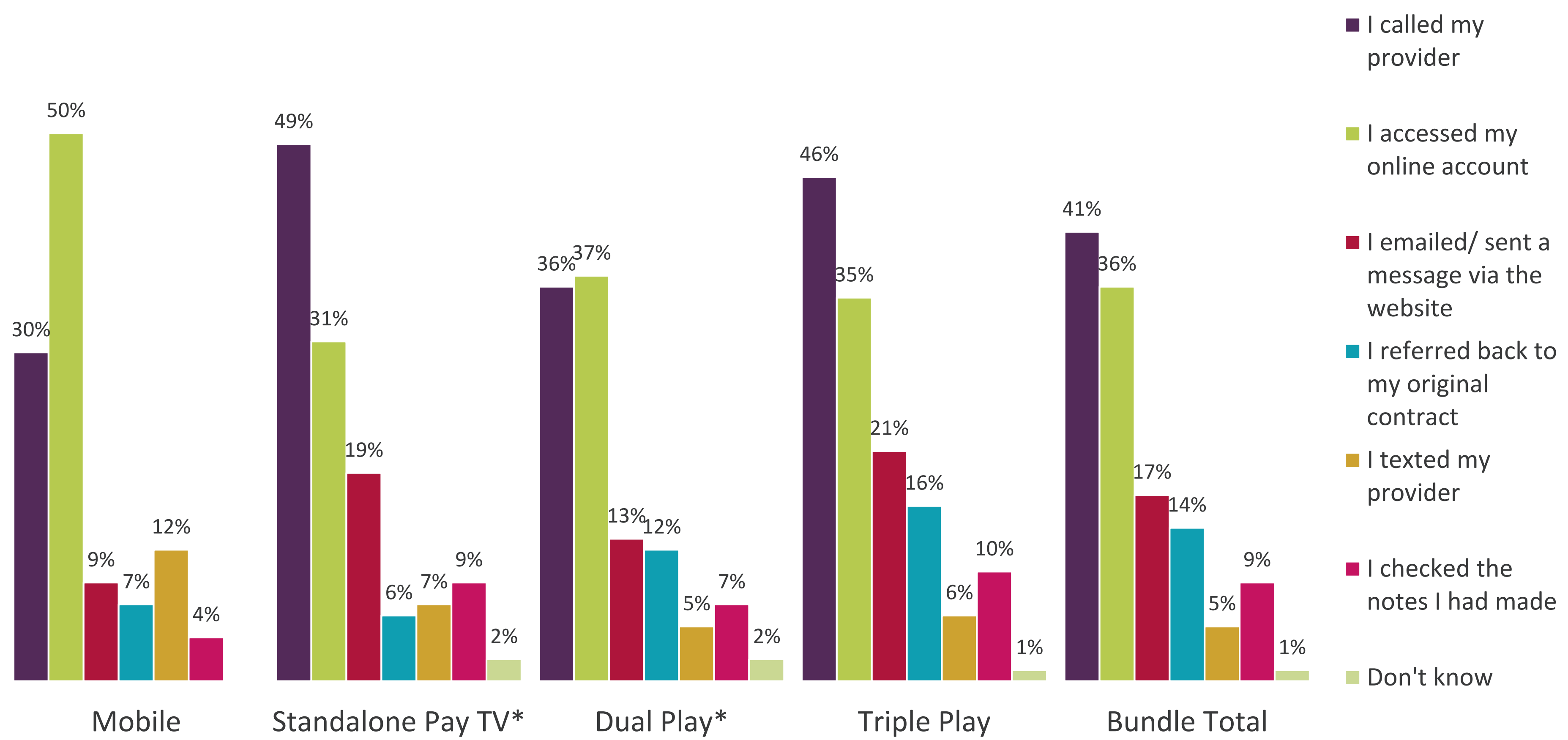
Source: Ofcom Consumer Engagement 2018

Q7. Have you ever tried to find out the specific date that your contract for your (SERVICE) with (PROVIDER) comes to an end or if it has ended?

Base: All in contract (Mobile 586, Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381)

Those looking for their contract end date have mostly looked at their online account (esp. mobile) or called their provider (esp. Pay TV)

How tried to find contract end date – in contract, by market



Source: Ofcom Consumer Engagement 2018

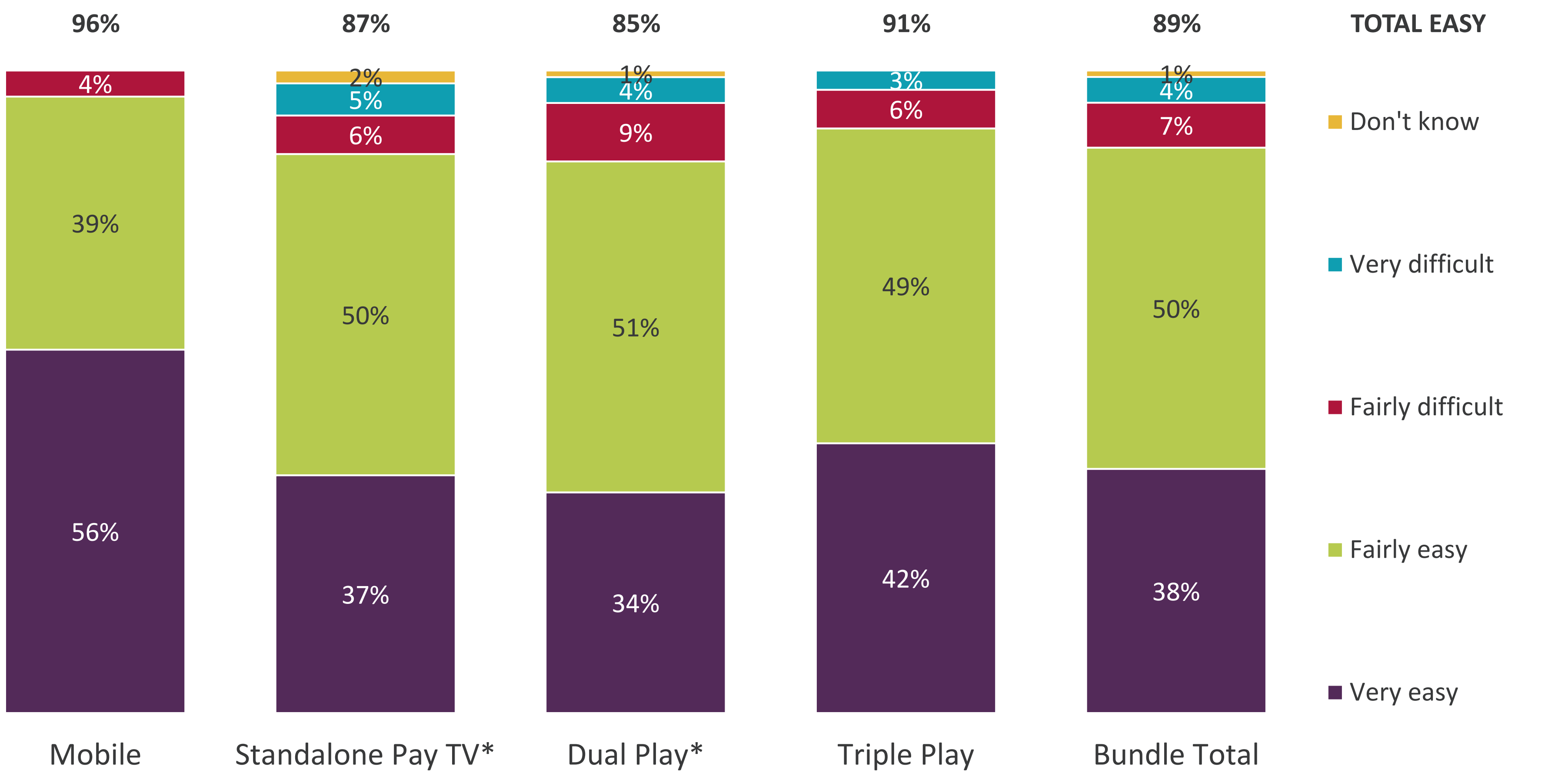
Q8. How did you (try to) find out when your contract for your (SERVICE) comes to an end?

Base: All in contract who have ever tried to find out their contract end date (Mobile 109, Standalone Pay TV 90*, Dual Play 99*, Triple Play 122, Bundle Total 221)

*Caution: Low base, treat as indicative only

For the minority who have looked and found their contract end date, almost all found this easy

How easy or difficult to find contract end date – in contract, by market



Source: Ofcom Consumer Engagement 2018

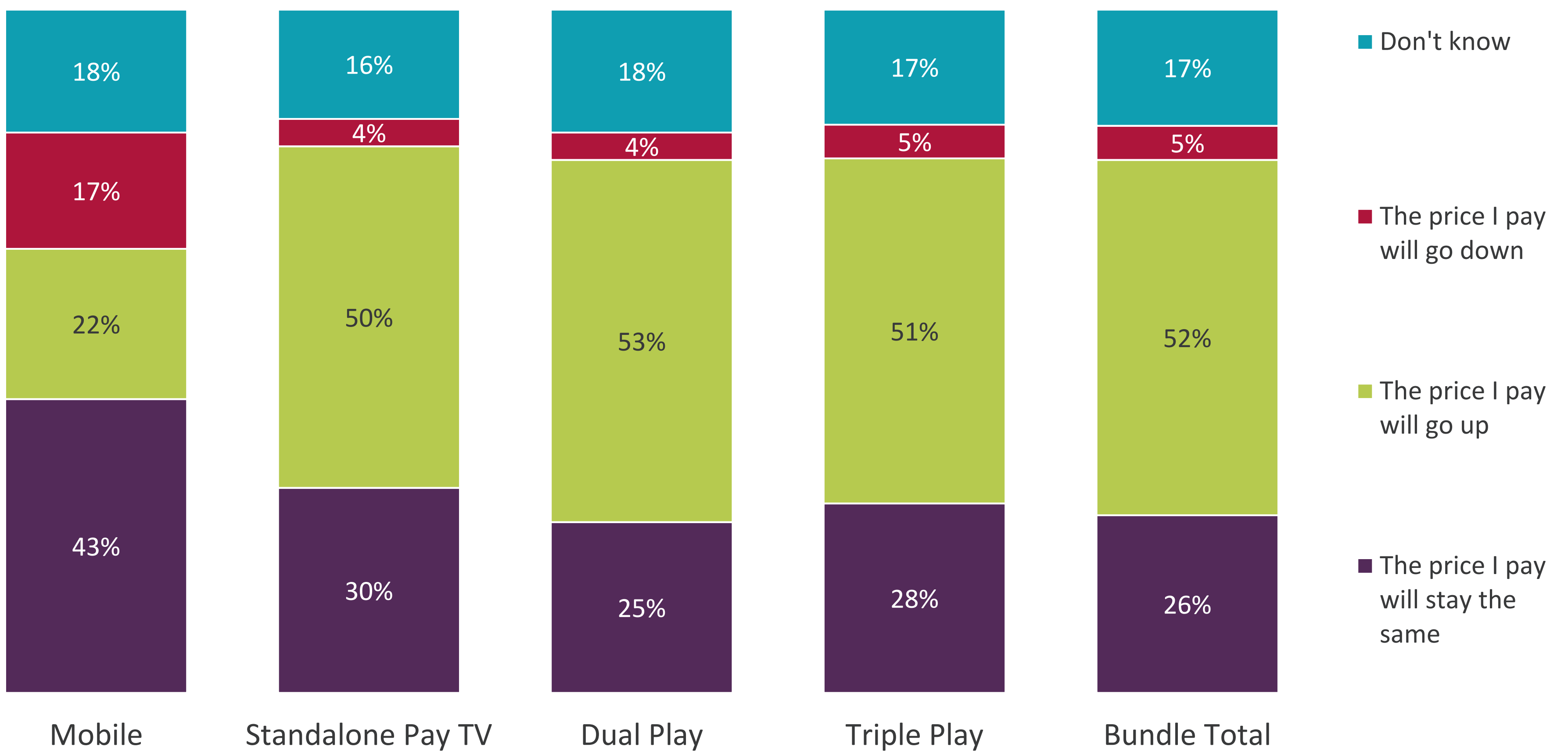
Q9. How easy or difficult was it to find your contract end date for your (SERVICE)?

Base: All in contract who have succeeded in finding their contract end date (Mobile 101, Standalone Pay TV 73*, Dual Play 84*, Triple Play 101, Bundle Total 185)

*Caution: Low base, treat as indicative only. N.B. Even for these consumers, we consider that there is time and effort required to keep track of the relevant contract information and they would need further effort to understand the implications of their contracting ending

Around one-fifth don't know what will happen to the price when their contract ends – more (non-mobile) expect an increase than no change

Knowledge of what will happen to price when minimum term has ended – in contract, by market



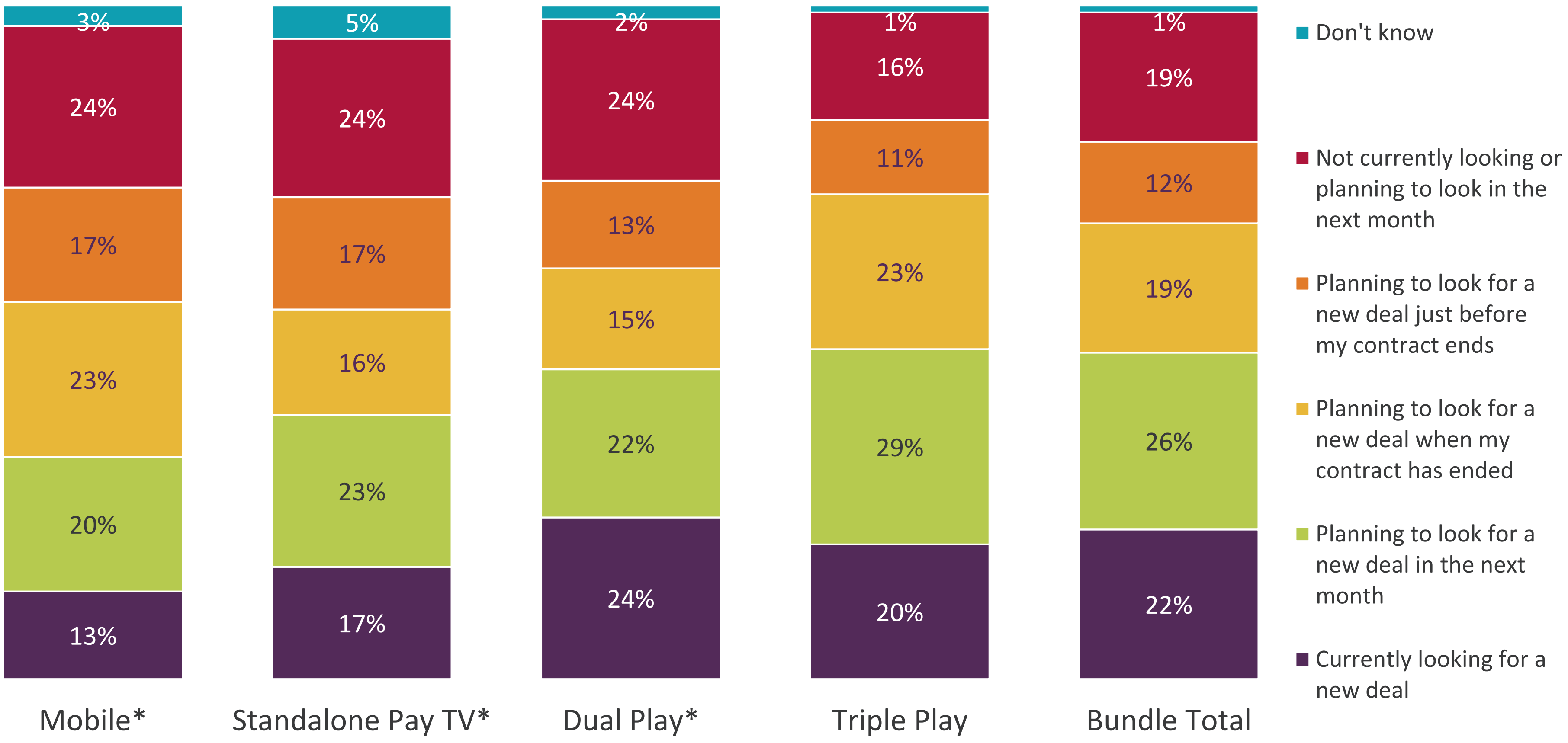
Source: Ofcom Consumer Engagement 2018

Q13. If you don't make any changes, when your current contract for your (SERVICE) with (PROVIDER) comes to an end, what do you think will happen to the price you pay?

Base: All in contract (Mobile 586, Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381)

Some of those nearing the end of their contract are currently looking for a new deal, others are intending to look.

Whether looking for a new deal – in last 3 months of contract, by market



Source: Ofcom Consumer Engagement 2018

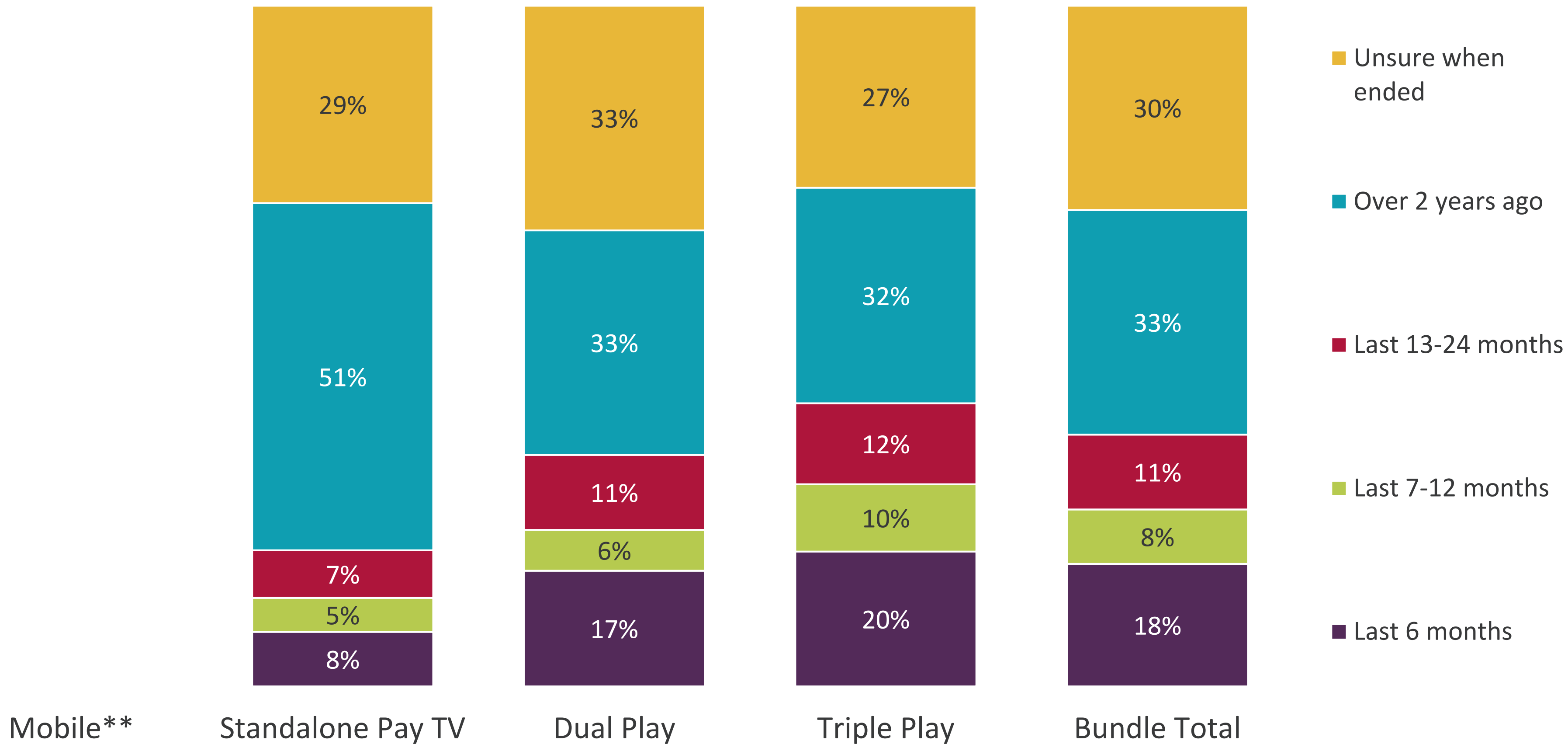
Q22. Which ONE of these best describes your current thinking about your (SERVICE) – either with your current provider or an alternative provider?

Base: All in the last 3 months of their contract (Mobile 84*, Standalone Pay TV 85*, Dual Play 97*, Triple Play 109, Bundle Total 206)

*Caution: Low base, treat as indicative only

Around three in ten who are out of their contract are unsure when the contract ended, most others say this was over two years ago

Length of time out of contract, by market



Source: Ofcom Consumer Engagement 2018

Q5. For how long now have you been out of your contract with (PROVIDER) for your (SERVICE) – so when did your contract run out?

Base: All who think they are out of contract (Mobile 45**, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)

**Base too low to report (not possible to combine with those unsure of their contract status for this question)

Around nine in ten in contract would find it useful to be contacted and told when their contract is coming to an end, half or more 'very useful'

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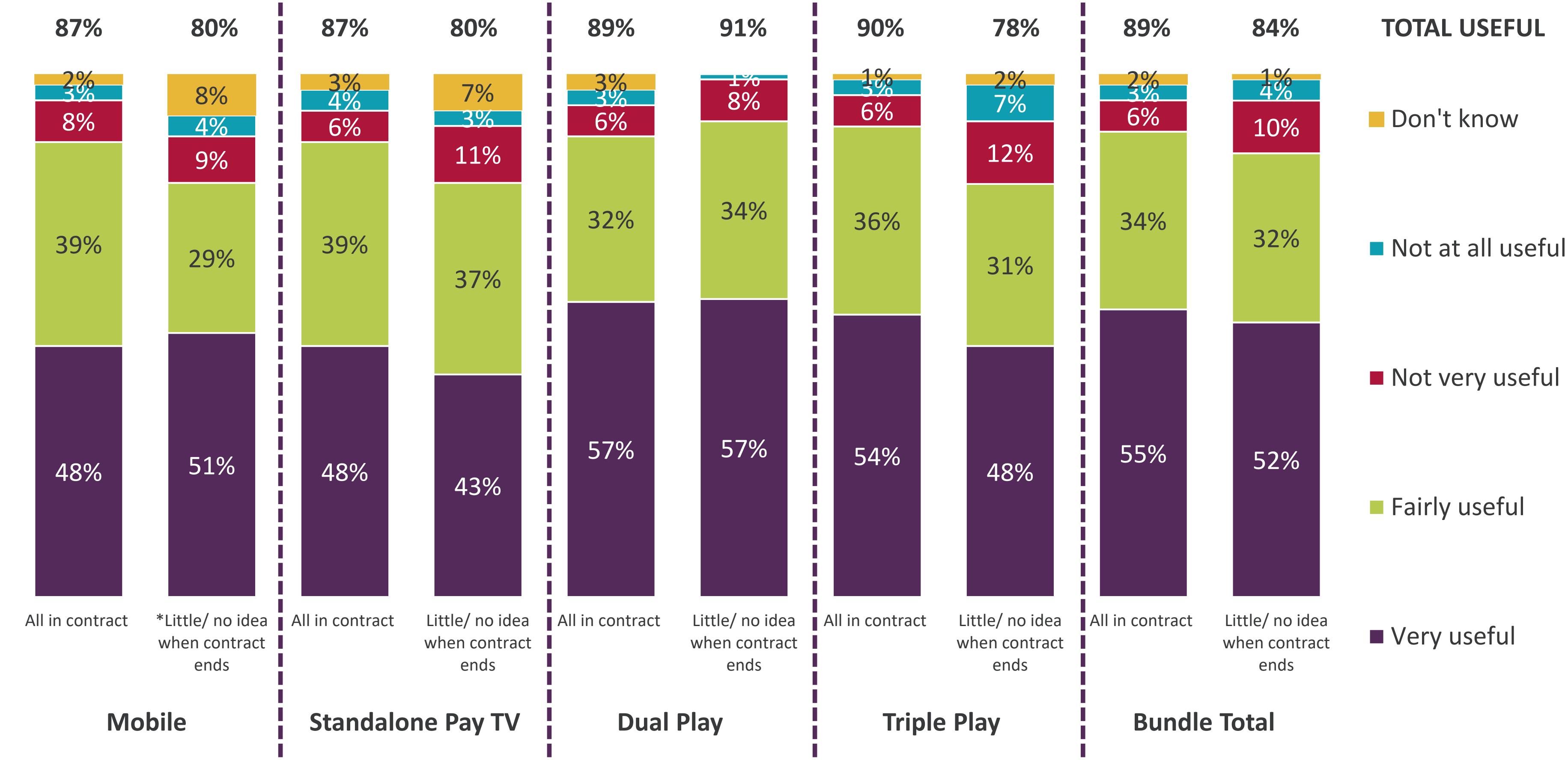
Usefulness of being told when contract ends – in contract, by market



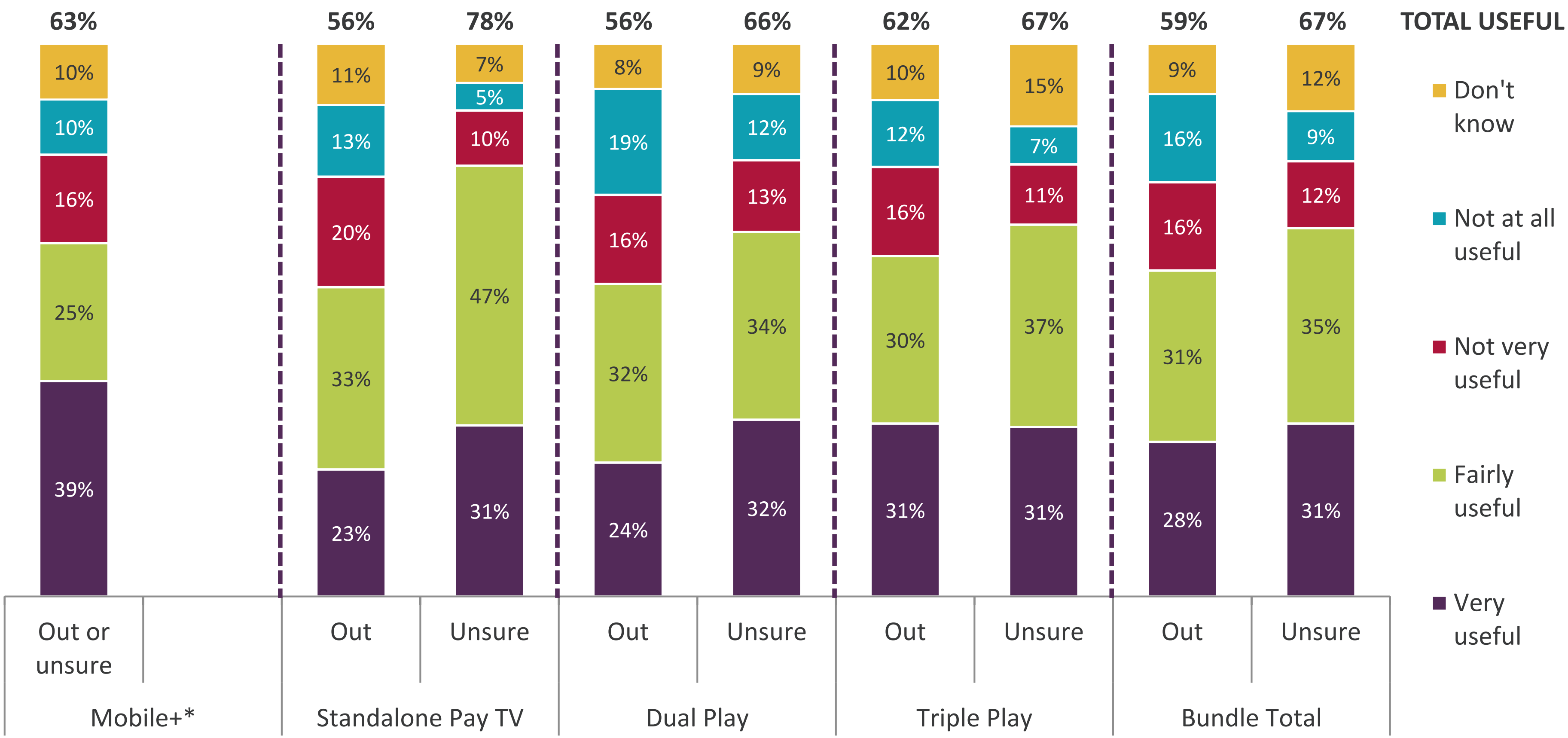
Source: Ofcom Consumer Engagement 2018

Q10a. How useful would you find it to be contacted by your provider and told your contract for (SERVICE) is coming to an end, for example about 1-2 months before this happens?

Base: All in contract (Mobile 586, Standalone Pay TV 681, Dual Play 683, Triple Play 698, Bundle Total 1381)/ All in contract with very little or no idea when their contract ends (Mobile 67*, Standalone Pay TV 134, Dual Play 120, Triple Play 125, Bundle Total 245) *Caution: Low base, treat as indicative only

Most of those unsure of their contract status or out of contract would find an ECN useful.

Usefulness of being told contract has ended – out of contract/ unsure if in contract, by market



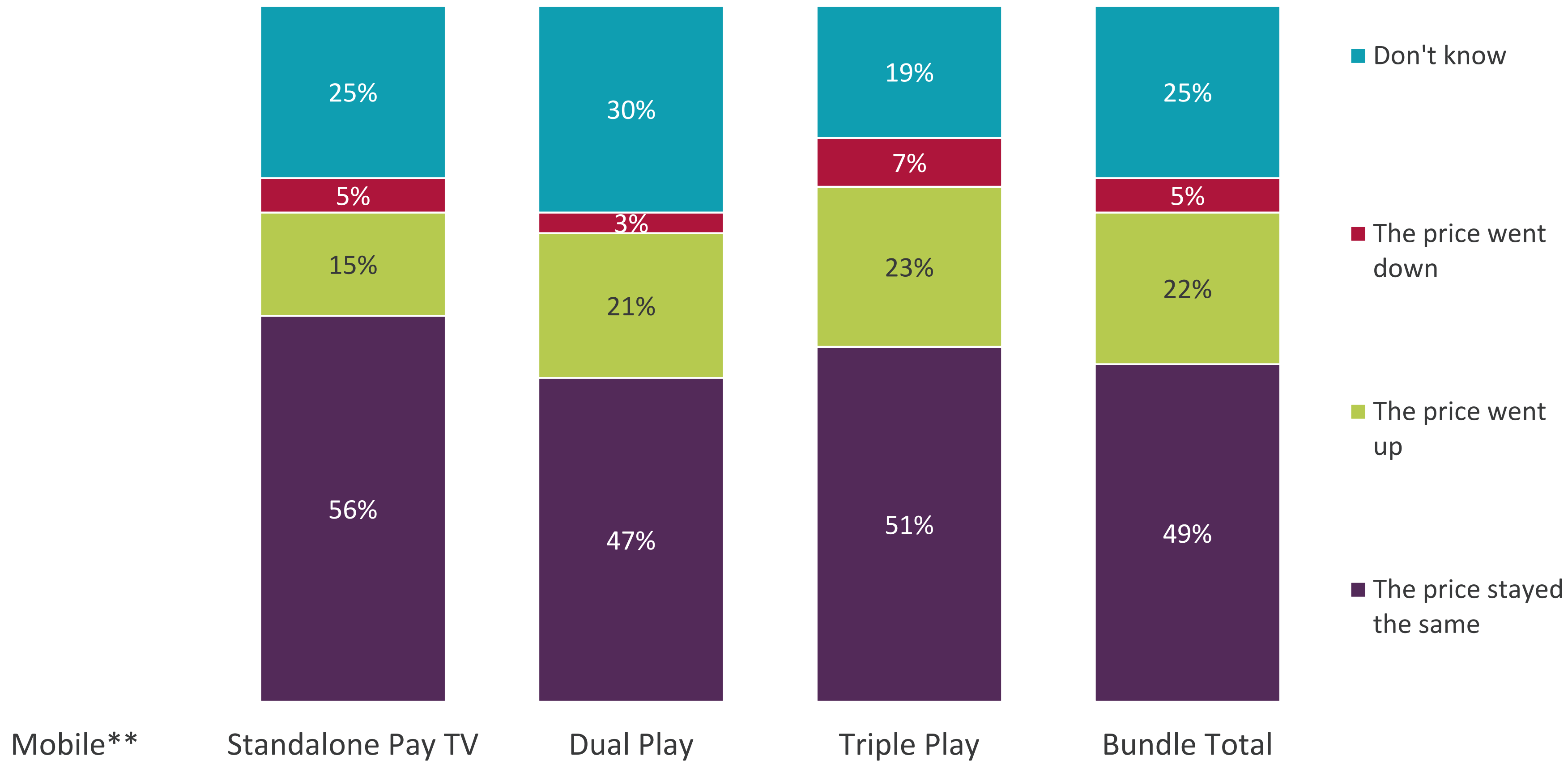
Source: Ofcom Consumer Engagement

Q10b. How useful would you find it to be contacted by your provider and told (if/ that) you are out of contract for your (SERVICE)?

Base: All who think they are out of contract (Mobile 89+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)/ Base: All who are unsure whether or not they are in contract (Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301) *Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

A sizeable minority in each market are unsure of what happened to the price of their service at the end of their minimum contract period.

What happened to price at end of contract – out of contract, by market



Source: Ofcom Consumer Engagement 2018

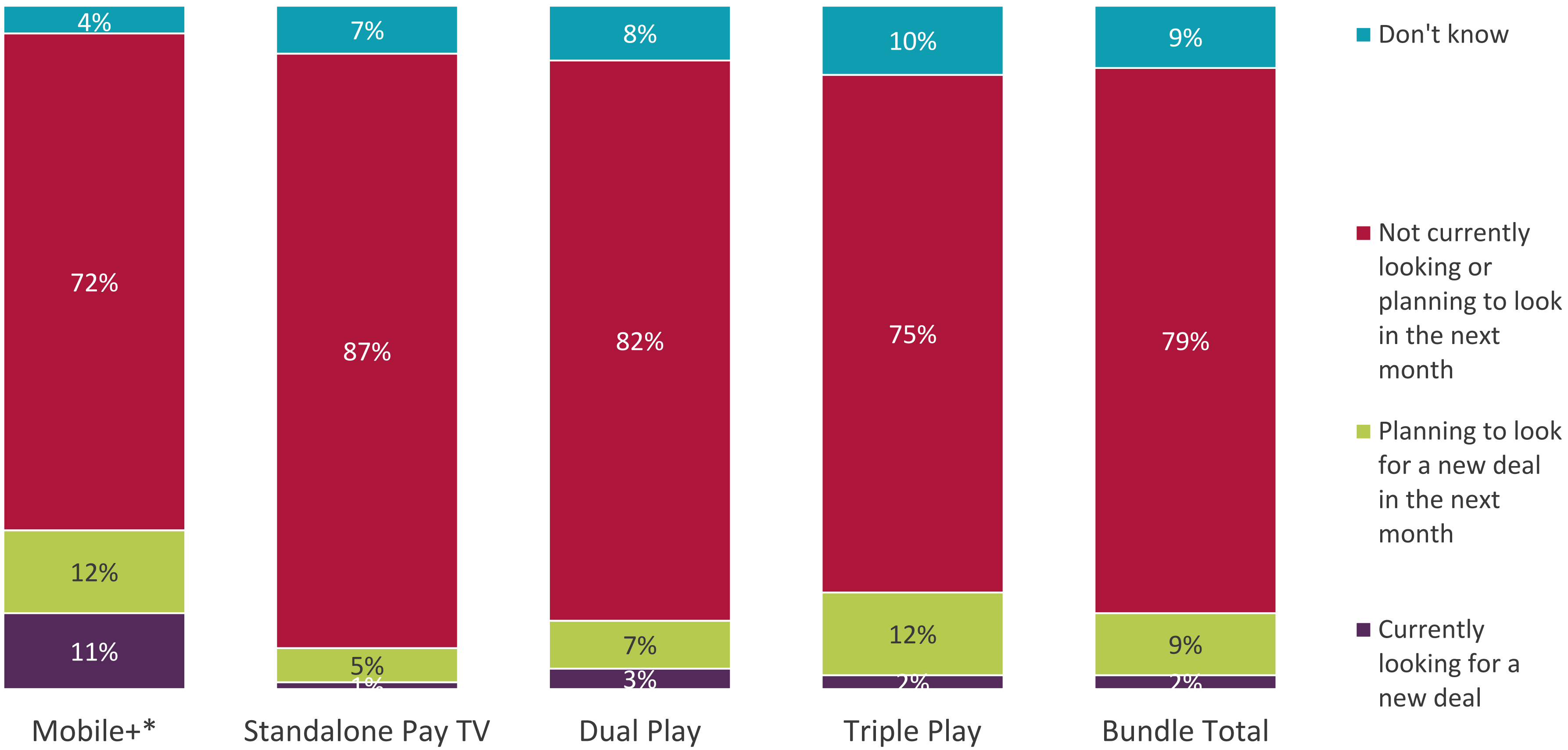
Q14. When your most recent contract for your (SERVICE) with (PROVIDER) came to an end, which one of these describes what happened to the price?

Base: All who think they are out of contract (Mobile 45**, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)

**Base too low to report (not possible to combine with those unsure of their contract status for this question)

The majority of those unsure of their contract status have no plans to look for a new deal

Whether looking for a new deal – unsure whether or not in contract, by market



Source: Ofcom Consumer Engagement 2018

Q22. Which ONE of these best describes your current thinking about your (SERVICE) – either with your current provider or an alternative provider?

Base: All who are unsure whether or not they are in contract (Mobile 89+*, Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301)

*Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

The majority of those out of contract in each market have no plans to look for a new deal

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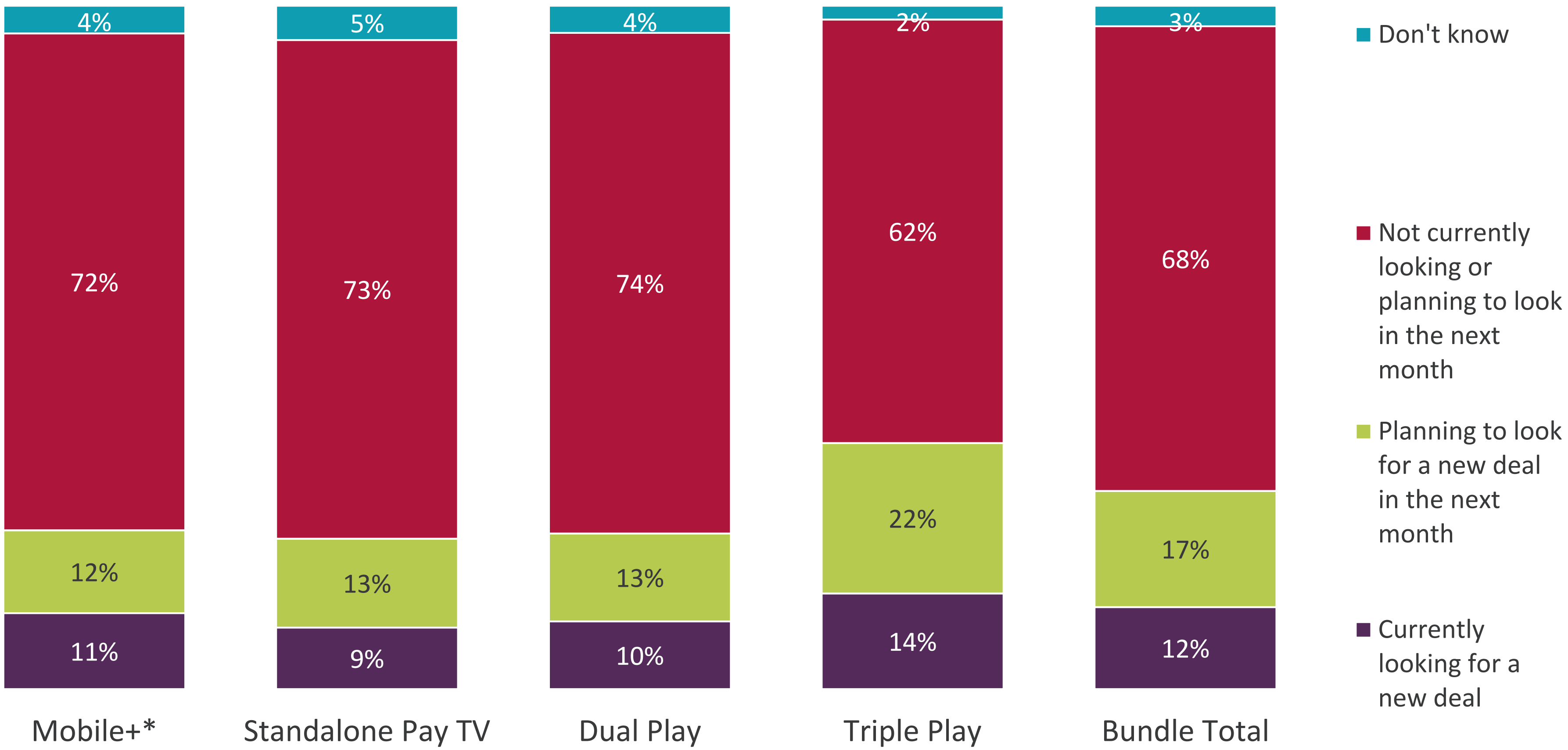
Whether looking for a new deal – out of contract, by market



Source: Ofcom Consumer Engagement 2018

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Base: All who think they are out of contract (Mobile 89+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)

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The main reason for not looking for a new deal in each market relates to satisfaction with the current provider

Reasons for not looking for a new deal – out of contract, by market

	Mobile+*	Standalone Pay TV	Dual Play	Triple Play	Bundle Total
Happy with the service I receive from my current provider	60%	56%	59%	57%	58%
I don't want to change provider	47%	36%	36%	45%	40%
I trust that my provider makes sure I am on their best deal	29%	16%	27%	17%	23%
Looking for a better deal isn't a priority	17%	15%	20%	22%	21%
It's too time consuming to compare deals	17%	16%	16%	20%	18%
I wouldn't save enough by finding a new deal with my current or another provider	5%	9%	17%	18%	17%
Other providers don't offer the service/s I need	5%	10%	9%	20%	14%
It's difficult to compare deals	14%	13%	12%	6%	10%
I value/ like being out of contract	3%	9%	9%	6%	8%
It's difficult to work out what I need from a deal	3%	10%	6%	4%	5%
No other providers are available in my area	-	11%	4%	3%	3%
Not confident/ don't understand enough to look into other deals	3%	2%	7%	5%	6%
Waiting for new equipment or technology to become available (e.g. a new handset or better broadband speed)	2%	2%	1%	5%	3%

Source: Ofcom Consumer Engagement 2018

Q24. Which, if any, of these are reasons why you are not intending to look for another deal with either your own provider or an alternative one?

Base: All who think they are out of contract and who are not looking or planning to look for a new deal (Mobile 65+*, Standalone Pay TV 126, Dual Play 142, Triple Play 103, Bundle Total 245) *Caution: Low base, treat as indicative only. +Mobile combines out of contract (31) and unsure (34). Chart shows responses given by 5% or more out of contract for any service.

One quarter of those mobile users who don't currently use SIMO are not aware they could move to a SIMO deal

% Not aware of SIM-only contracts – all mobile, Pay As You Go, in contract, in last 3 months of contract

Source: Ofcom Consumer Engagement 2018

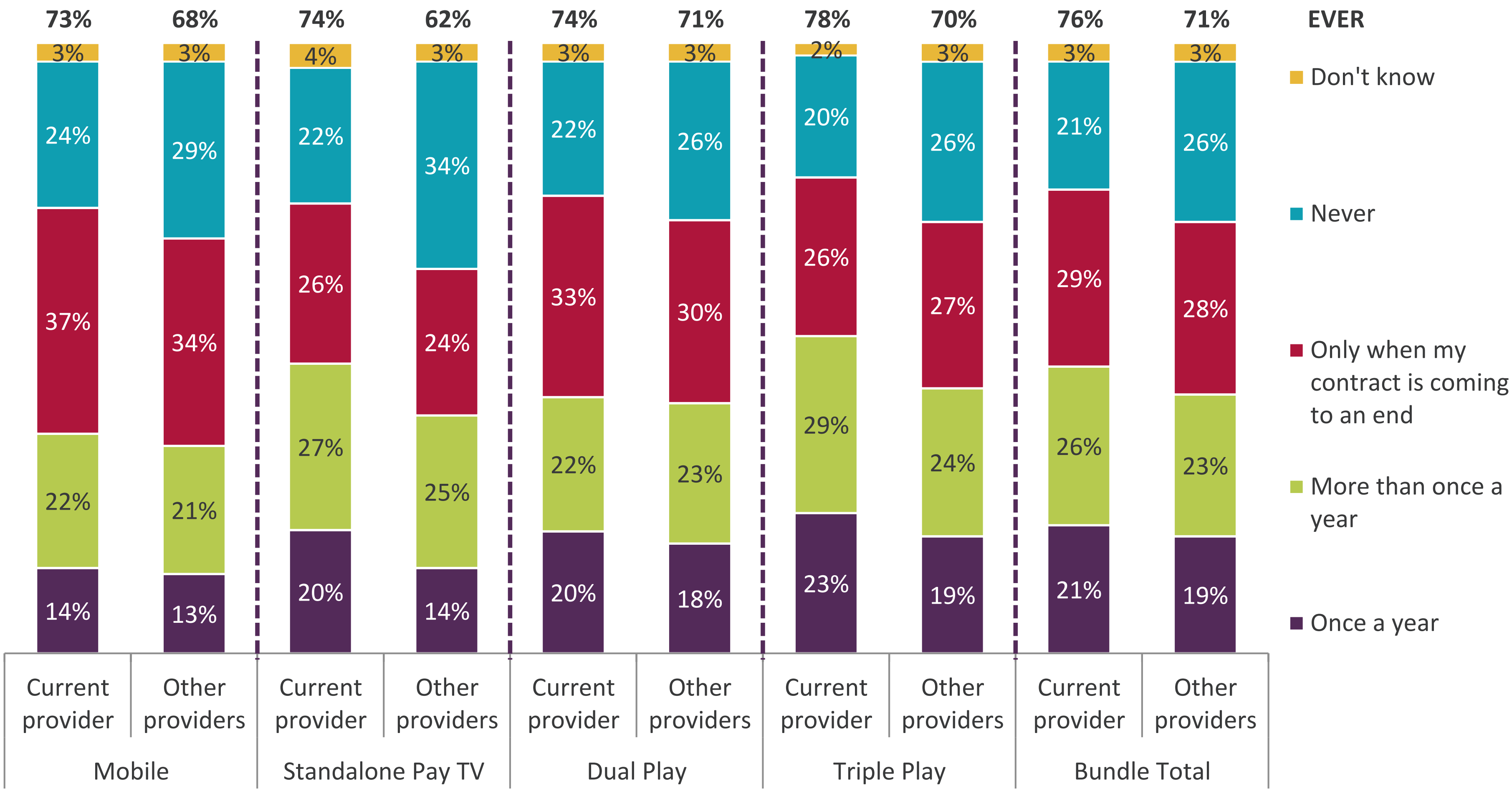
Q15. (IF NOT USING PAY AS YOU GO) Before now, were you aware that at the end of your minimum contract period, if you keep your handset you could move to a SIM-only contract with either your existing provider or an alternative provider? (IF USING PAY AS YOU GO) Before now, were you aware of this type of contract?

Base: All Mobile excluding SIM only users (844), all using Pay As You Go (337), all in contract (456), all in last 3 months of contract (68*)

*Caution: Low base, treat as indicative only. **NB** – too few out of contract (21) or unsure of contract status (30) to report on

A sizeable minority never look at deals, and are less likely to look at deals from alternative providers than from their current provider.

Frequency of looking into deals from own/ alternative providers – in contract, by market



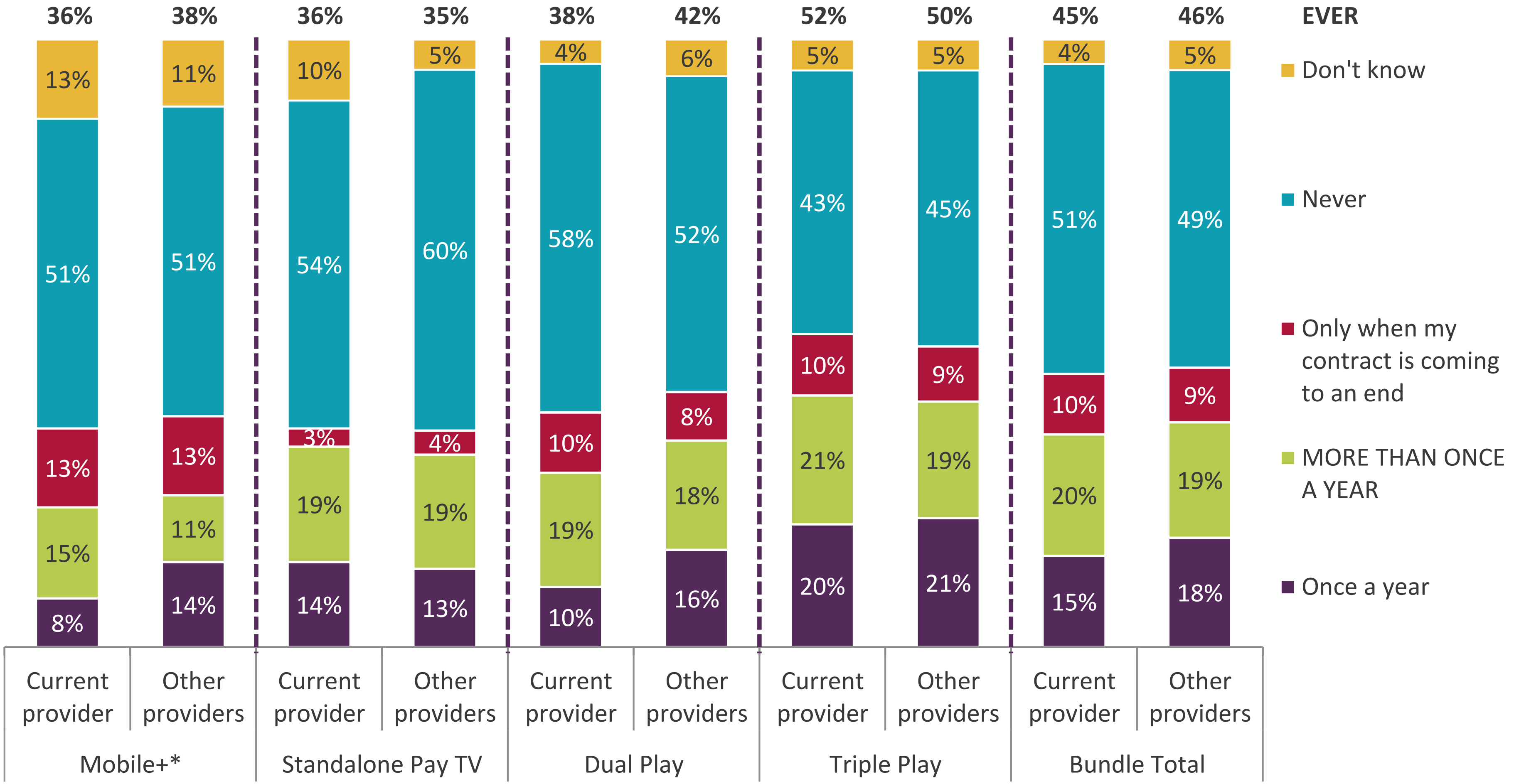
Source: Ofcom Consumer Engagement

Q20. How often – if at all – do you look into what other deals for your (SERVICE) are available from your current provider?/ Q21. And how often – if at all – do you look around to see what other deals for your (SERVICE) are available from other providers?

Base: All in contract (Mobile 586, Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381)

Those out of contract are unlikely to ever look at deals, with little difference between looking at current or alternative providers

Frequency of looking into deals from own/ alternative providers – out of contract, by market



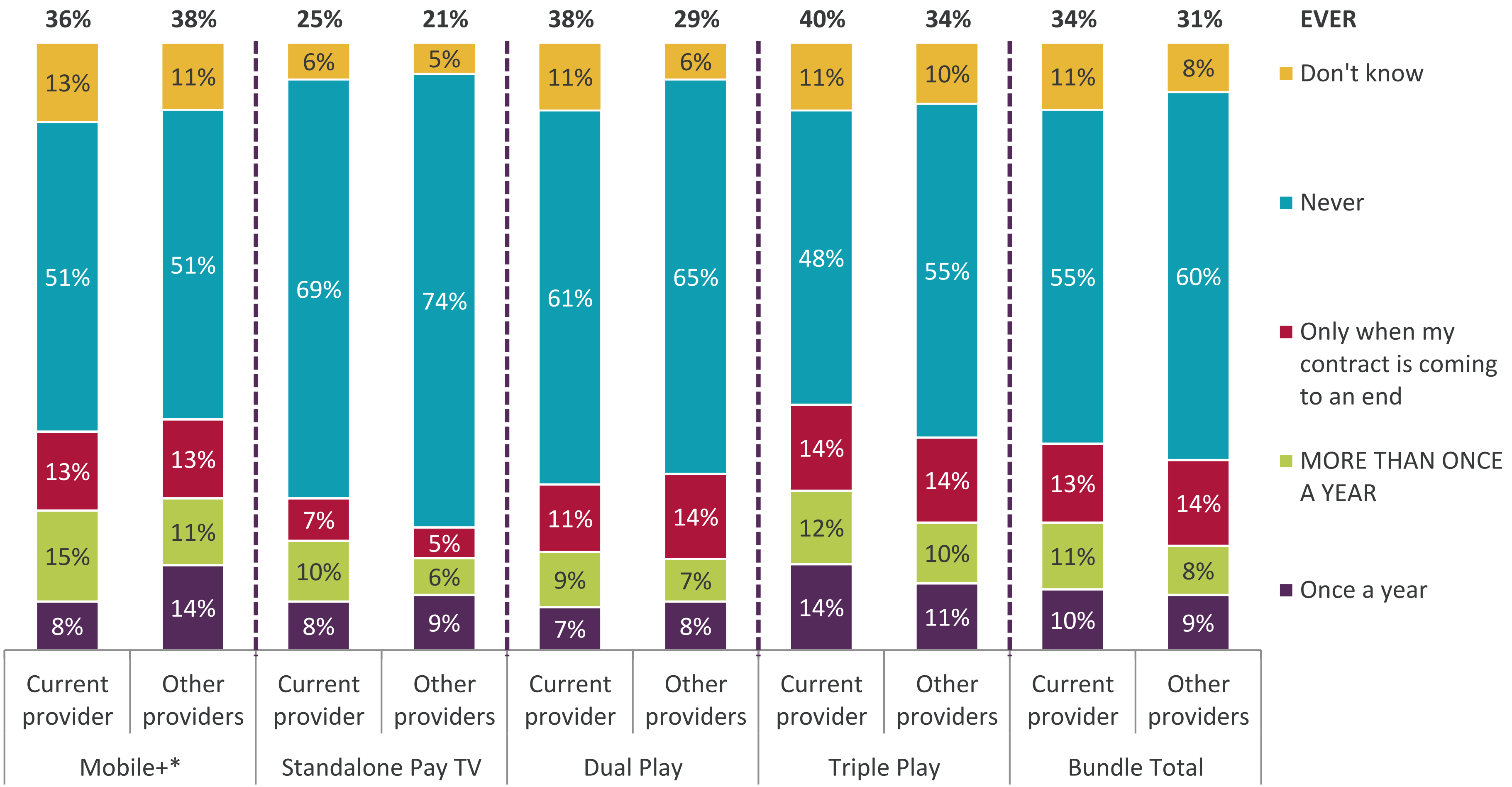
Source: Ofcom Consumer Engagement

Q20. How often – if at all – do you look into what other deals for your (SERVICE) are available from your current provider?/ Q21. And how often – if at all – do you look around to see what other deals for your (SERVICE) are available from other providers?

Base: All who think they are out of contract (Mobile 89+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378) *Caution: Low base, treat as indicative only. +Mobile combined out of contract (45) and unsure (44)

Those unsure of their contract status are even less likely than those out of contract to ever look at deals.

Frequency of looking into deals from own/ alternative providers – unsure whether in contract, by market



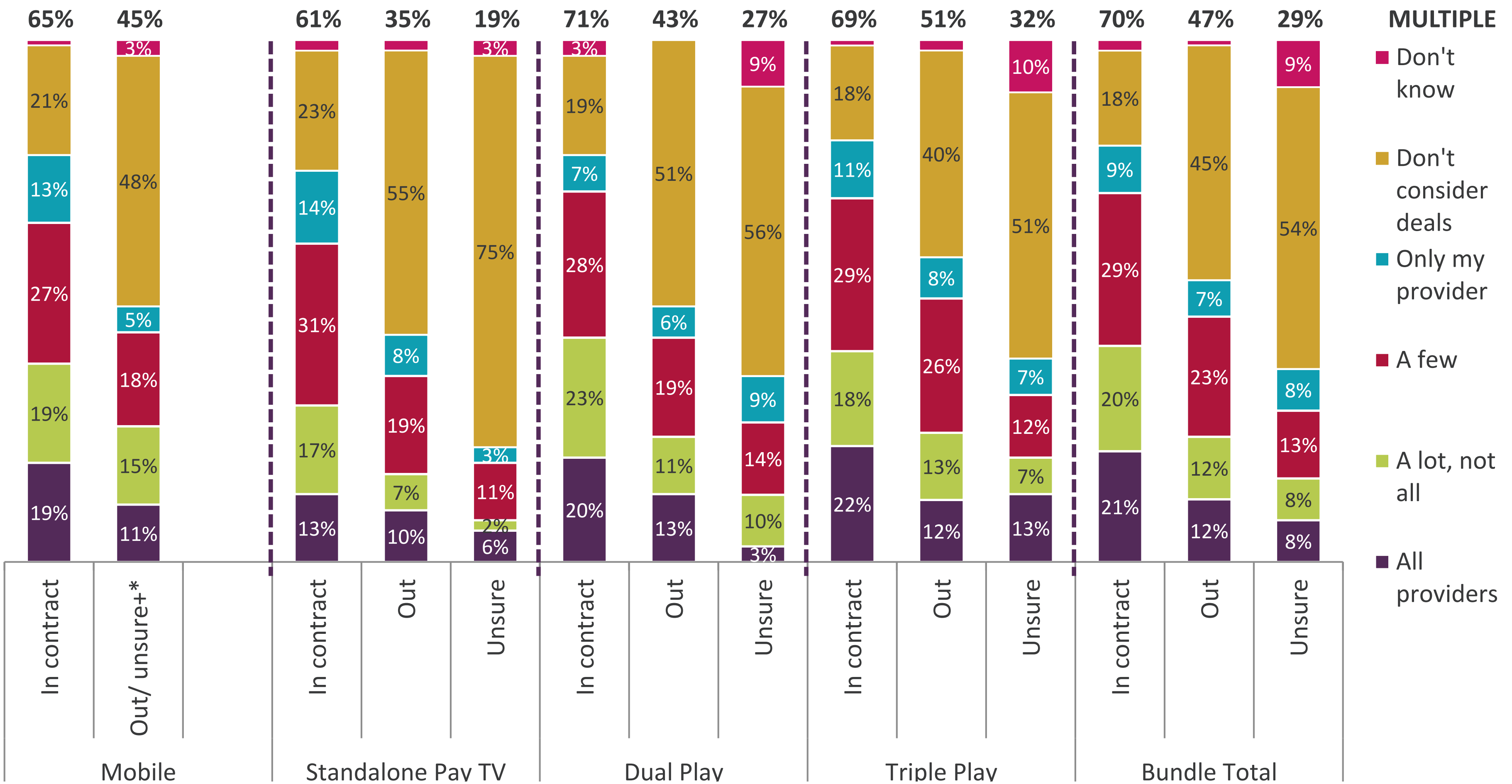
Source: Ofcom Consumer Engagement

Q20. How often – if at all – do you look into what other deals for your (SERVICE) are available from your current provider?/ Q21. And how often – if at all – do you look around to see what other deals for your (SERVICE) are available from other providers?

Base: All who are unsure whether or not they are in contract (Mobile 89+*, Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301) *Caution: Low base, treat as indicative only. +Mobile combined out of contract (45) and unsure (44)

Most of those in contract say they consider deals from multiple providers but most others don't consider any deals

Range of providers considered – in contract/ out of contract/ unsure if in contract, by market



Source: Ofcom Consumer Engagement

Q37. When you are considering the different (SERVICE) deals or providers, which one of these statements best describes how many providers you look at?

Base: All in contract (Mobile 586, Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381)/ Base: All who think they are out of contract (Mobile 89+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)/ Base: All who are unsure whether or not they are in contract (Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301)

*Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

Among those in contract the main reasons for not looking at deals from other providers relate to satisfaction with current provider

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Reasons for not looking at deals from other providers – in contract, by market

	Mobile	Standalone Pay TV	Dual Play	Triple Play	Bundle Total
I have good service from my provider and have no reason to change	44%	42%	43%	44%	44%
I am confident that my current provider will give me the best deal	45%	35%	37%	38%	37%
It's too much hassle/ too time consuming to look around †	16%	22%	33%	23%	27%
It would be too much hassle to go through the process of switching provider even if I found a better deal †	19%	15%	20%	21%	20%
My provider has unique features/ services that I cannot get elsewhere	5%	28%	8%	17%	13%
I am worried that other providers might not be as reliable as my current provider	12%	12%	15%	12%	13%
Because the amount of money I spend on my (SERVICE) does not warrant spending any more time on searching for better deals †	15%	5%	13%	14%	14%
I just want to check that I am on the best deal I can get from my current provider	7%	8%	7%	7%	7%
TOTAL 'HASSLE' †	***40%***	***33%***	***47%***	***40%***	***44%***

Source: Ofcom Consumer Engagement 2018

Q38. Why don't you look at deals from other providers for your (SERVICE)?

Base: All in contract who do not consider more than their current provider for their (SERVICE) (Mobile 196, Standalone Pay TV 222, Dual Play 169, Triple Play 195, Bundle Total 364)

'Hassle' reasons are more likely among those out of contract but satisfaction with service from current provider also features.

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Reasons for not looking at deals from other providers – out of contract, by market

	Mobile**	Standalone Pay TV	Dual Play	Triple Play*	Bundle Total
I have good service from my provider and have no reason to change		34%	40%	42%	40%
I am confident that my current provider will give me the best deal		15%	37%	28%	33%
It's too much hassle/ too time consuming to look around †		29%	37%	30%	34%
It would be too much hassle to go through the process of switching provider even if I found a better deal †		20%	16%	26%	20%
My provider has unique features/ services that I cannot get elsewhere		22%	4%	13%	8%
I am worried that other providers might not be as reliable as my current provider		12%	20%	24%	22%
Because the amount of money I spend on my (SERVICE) does not warrant spending any more time on searching for better deals †		8%	13%	16%	15%
I just want to check that I am on the best deal I can get from my current provider		4%	3%	5%	4%
TOTAL 'HASSLE' †		***43%***	***49%***	***57%***	***52%***

Source: Ofcom Consumer Engagement 2018

Q38. Why don't you look at deals from other providers for your (SERVICE)?

Base: All who think they are out of contract who do not consider more than their current provider for their (SERVICE) (Mobile 26**, Standalone Pay TV 110, Dual Play 102, Triple Play 82*, Bundle Total 184) *Caution: Low base, treat as indicative only. **Base too low to report (below 50 for Mobile combining Out of contract and unsure)

A more mixed picture among those unsure of their contract status, but for many it remains too much 'hassle'

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Reasons for not looking at deals from other providers – unsure whether in contract, by market

	Mobile**	Standalone Pay TV	Dual Play	Triple Play*	Bundle Total
I have good service from my provider and have no reason to change		37%	46%	32%	40%
I am confident that my current provider will give me the best deal		21%	28%	24%	26%
It's too much hassle/ too time consuming to look around †		36%	27%	24%	26%
It would be too much hassle to go through the process of switching provider even if I found a better deal †		22%	31%	19%	26%
My provider has unique features/ services that I cannot get elsewhere		19%	7%	10%	8%
I am worried that other providers might not be as reliable as my current provider		16%	18%	16%	17%
Because the amount of money I spend on my (SERVICE) does not warrant spending any more time on searching for better deals †		9%	11%	7%	9%
I just want to check that I am on the best deal I can get from my current provider		2%	4%	4%	4%
TOTAL 'HASSLE' †		***46%***	***47%***	***41%***	***44%***

Source: Ofcom Consumer Engagement 2018

Q38. Why don't you look at deals from other providers for your (SERVICE)?

Base: All who unsure whether or not they are in contract who do not consider more than their current provider for their (SERVICE) (Mobile 23**, Standalone Pay TV 110, Dual Play 102, Triple Play 86*, Bundle Total 188) *Caution: Low base, treat as indicative only. **Base too low to report (below 50 for Mobile combining Out of contract and unsure)

Most of those who consider other providers feel their assessment is fairly good, but some admit this is a quick scan

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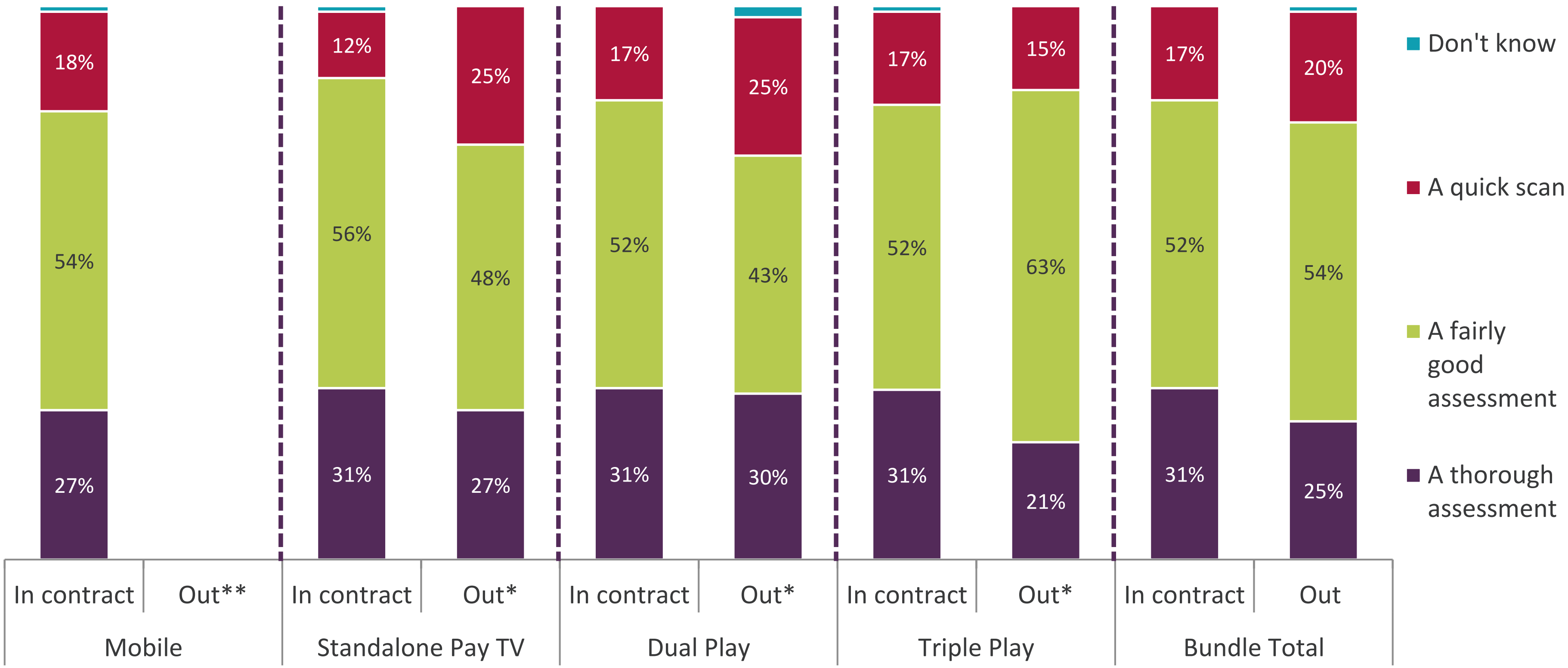
Depth of assessing providers – in contract/ out of contract, by market



Source: Ofcom Consumer Engagement

Q39. And when you are considering the different (SERVICE) deals, which one of these statements best describes the way you go about it?

Base: All in contract who consider other providers (Mobile 383, Standalone Pay TV 381, Dual Play 497, Triple Play 494, Bundle Total 991)/ Base: All who think they are out of contract who consider other providers (Mobile 19**, Standalone Pay TV 68*, Dual Play 96*, Triple Play 93*, Bundle Total 189) *Caution: Low base, treat as indicative only. **Base too low to report

Reasons for not doing more than a quick scan

Reasons for not doing more than a quick scan – in contract, by market

	Mobile*	Standalone Pay TV*	Dual Play*	Triple Play*	Bundle Total
I do not have time to spend doing detailed searches	31%	37%	28%	38%	33%
I generally stop looking once I have found a deal that is good enough	31%	19%	24%	31%	28%
I just want to check that I am on the best deal I can get from my current provider	19%	26%	24%	27%	26%
I take the best deal I can afford within my budget	21%	21%	22%	19%	20%
Because more than a quick scan is too confusing	17%	20%	19%	24%	22%
Because the amount of money I spend on (SERVICE) does not warrant spending any more time on searching for better deals	13%	18%	20%	13%	16%

Source: Ofcom Consumer Engagement 2018

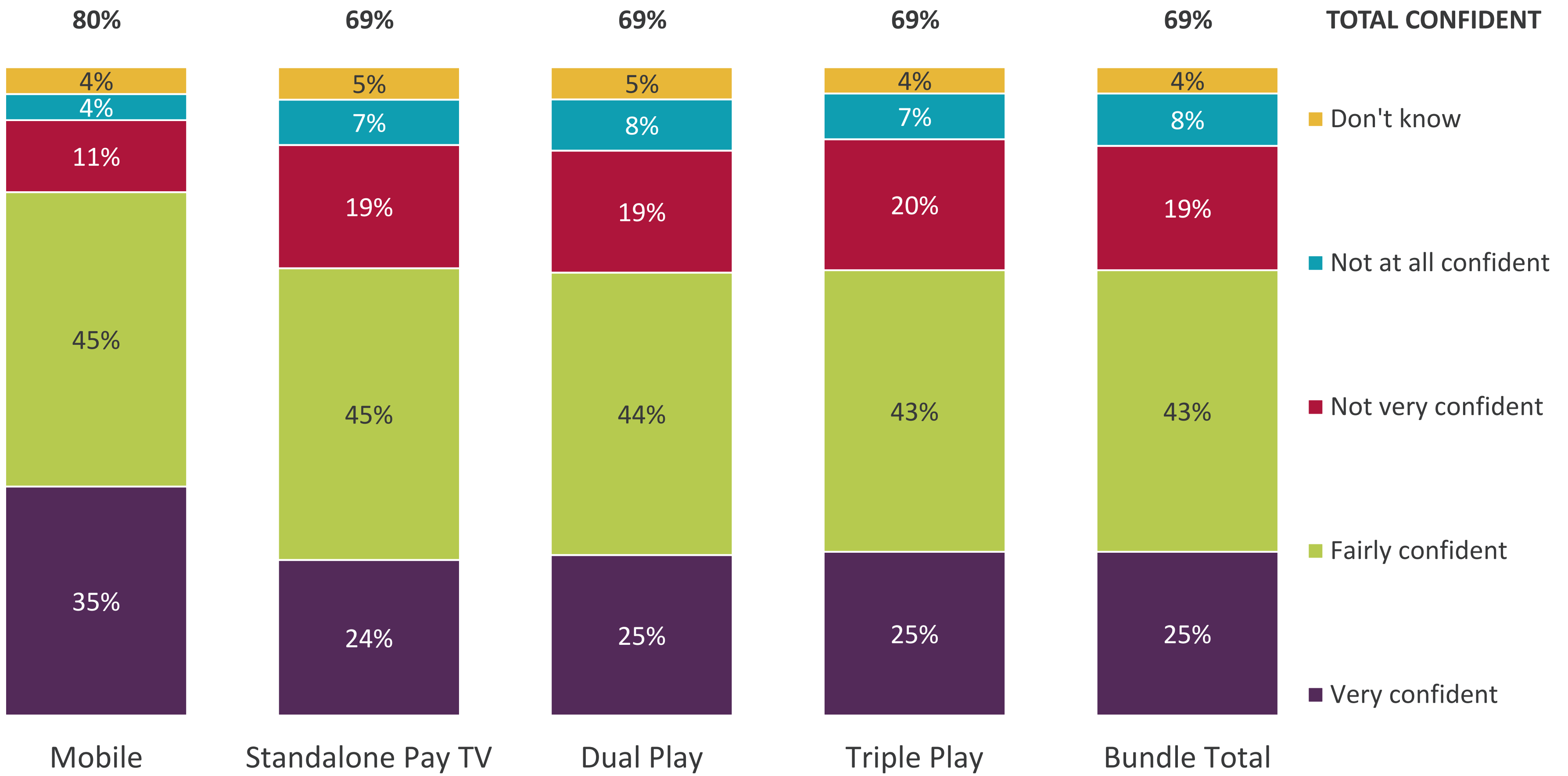
Q40. Why do you not spend more time searching the market?

Base: All in contract who consider other providers for their (SERVICE) but only do a quick scan (Mobile 65*, Standalone Pay TV 53*, Dual Play 71*, Triple Play 69*, Bundle Total 140) *Caution: Low base, treat as indicative only

Section 4
Understanding usage and needs

While most say they are confident their current deal is the best for them, a minority are very confident about this

Confidence that current deal is the best for them - by market



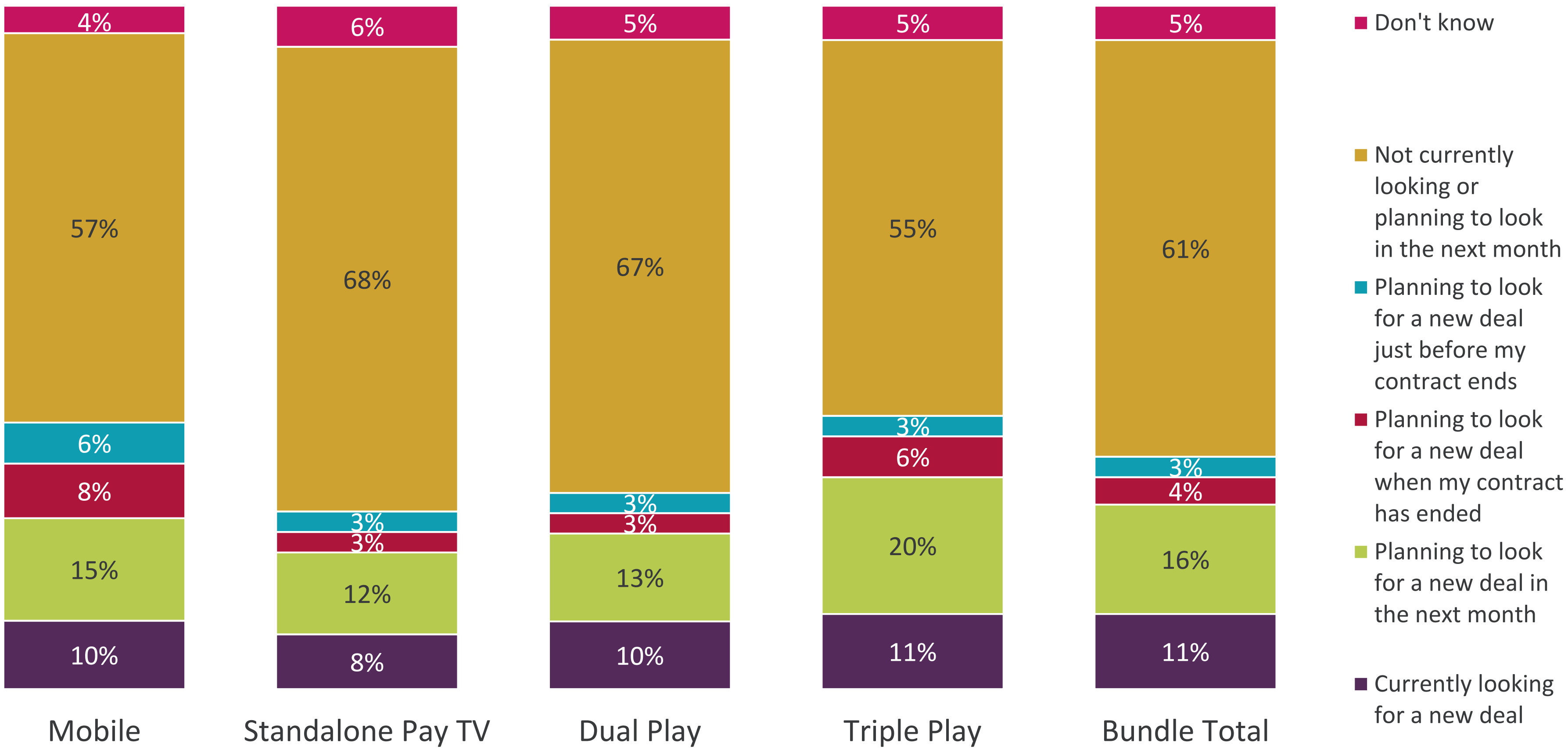
Source: Ofcom Consumer Engagement 2018

Q2. How confident are you that the current deal you have for your (SERVICE) is the best deal for you?

Base: All (Mobile 1136, Standalone Pay TV 946, Dual Play 1039, Triple Play 1021, Bundle Total 2060)

Across all who are not currently in a contract, most have no plans to look for a new deal

Whether looking for a new deal – all out of contract, unsure, nearing end or 30 day SIM only, by market



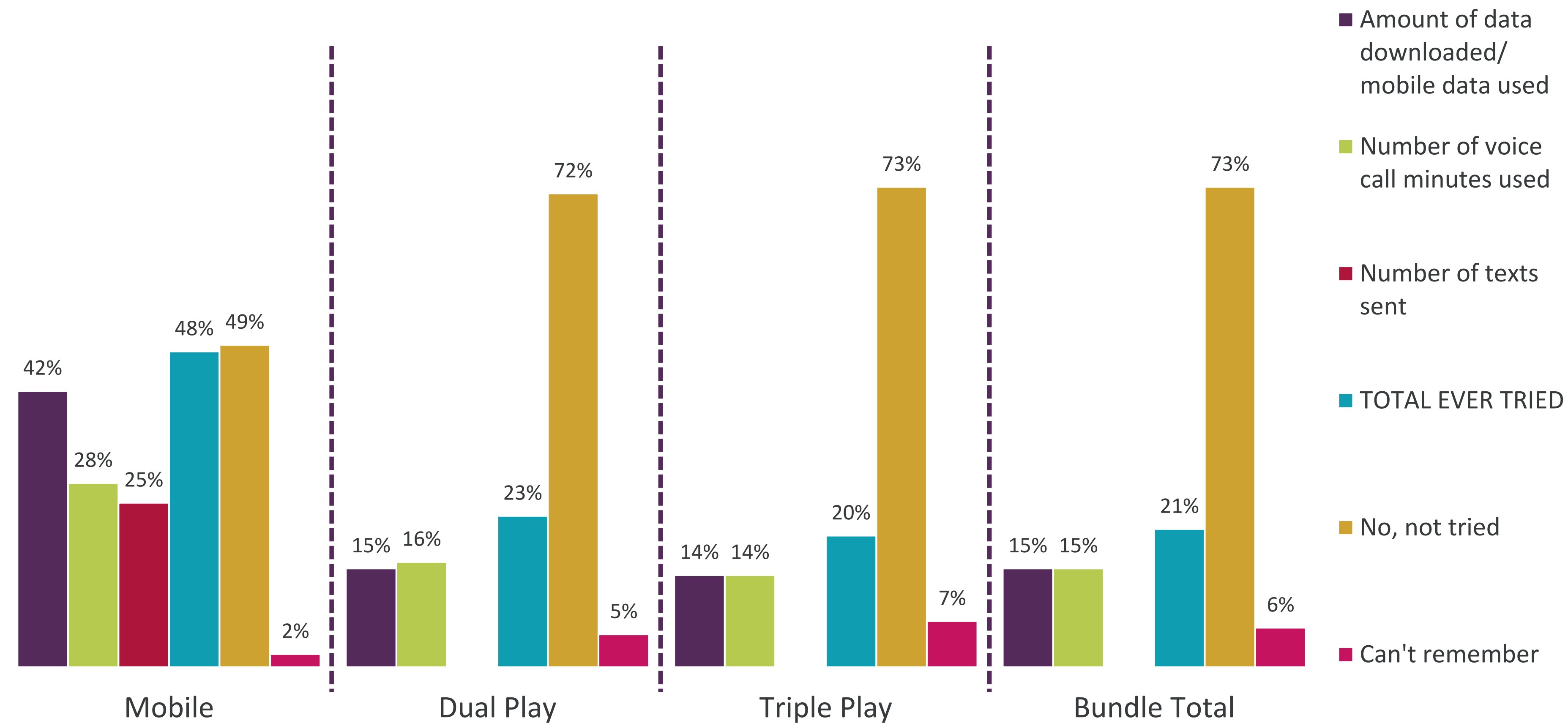
Source: Ofcom Consumer Engagement 2018

Q22. Which ONE of these best describes your current thinking about your (SERVICE) – either with your current provider or an alternative provider?

Base: All out of contract or unsure of their contract status or using SIM only 30 day or nearing the end of their contracts (Mobile 297, Standalone Pay TV 413, Dual Play 450, Triple Play 432, Bundle Total 882)

Few dual play or triple play and only half of mobile users have ever tried to find usage details

Whether ever tried to find out monthly usage details – and details looked for, by market



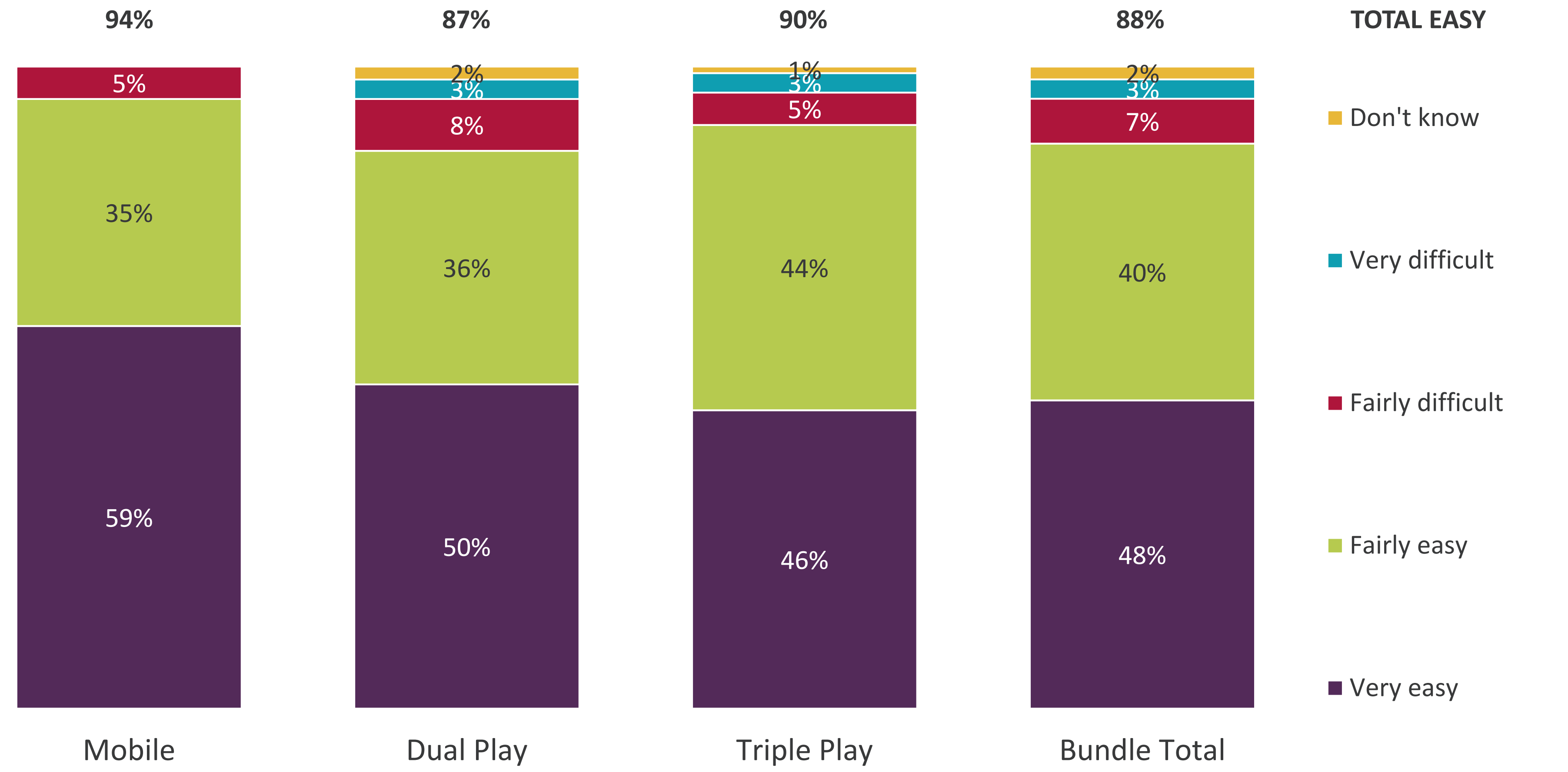
Source: Ofcom Consumer Engagement 2018

Q17. Have you ever tried to find out about any of the following aspects of your monthly usage for your (SERVICE) with (PROVIDER)?

Base: All (except standalone Pay TV) (Mobile 1136, Dual Play 1039, Triple Play 1021, Bundle Total 2060)

Among the minority who have ever looked for usage details, almost all found this easy

How easy or difficult to find monthly usage details – by market



Source: Ofcom Consumer Engagement 2018

Q18. How easy or difficult was it to find this usage information for your (SERVICE) with (PROVIDER)?

Base: All (except standalone Pay TV) who have ever tried to find monthly usage details (Mobile 514, Dual Play 241, Triple Play 208, Bundle Total 449)

N.B. Even for these consumers, we consider that there is time and effort required to find these details.

Most say they would be interested in getting usage information, with no clear preference for how this is obtained

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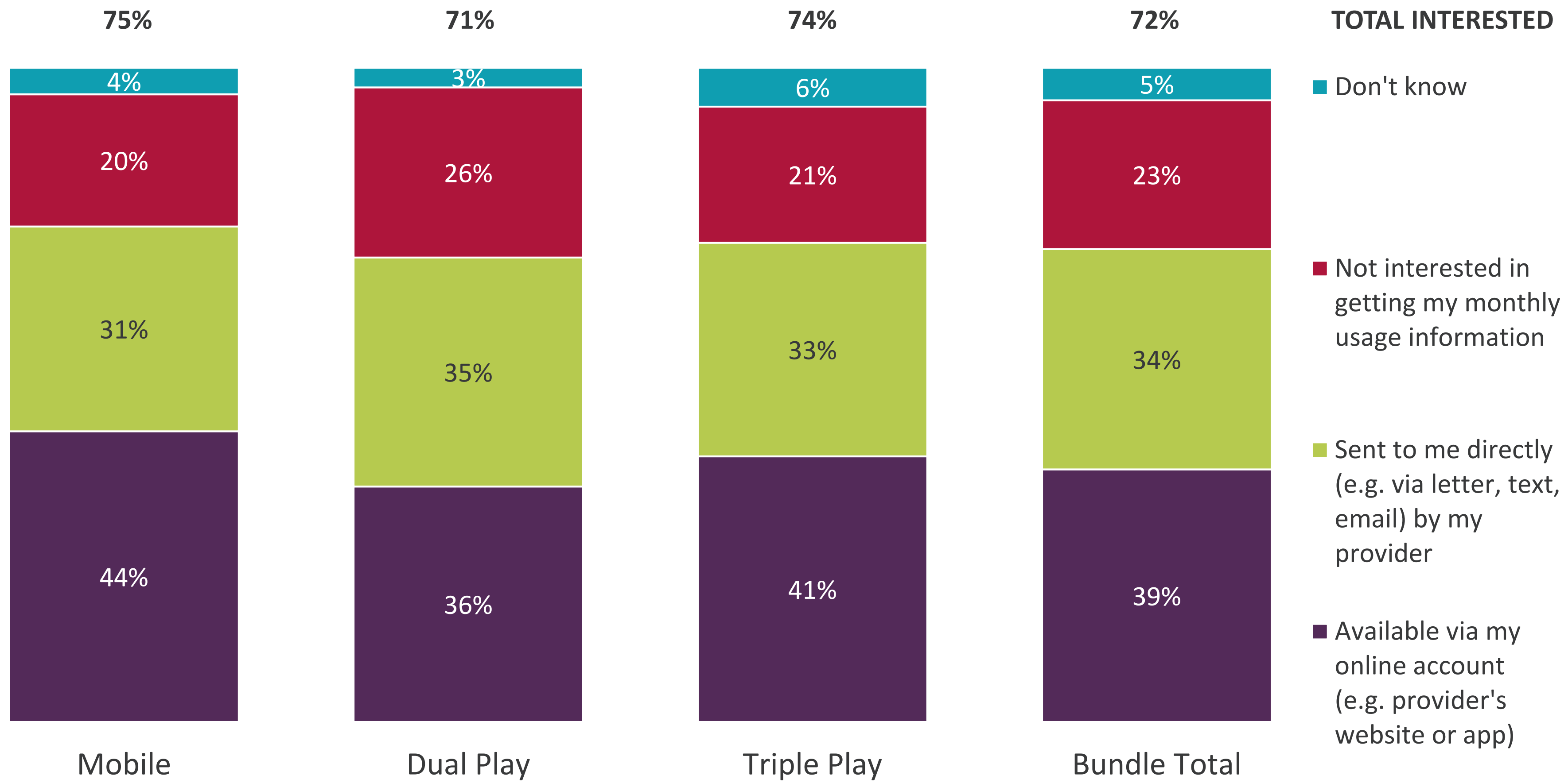
Preferred method for obtaining usage information – by market



Source: Ofcom Consumer Engagement 2018
Q19. Which one of these describes your preference for getting information about your usage of your (SERVICE)?
Base: All (except standalone Pay TV) (Mobile 1136, Dual Play 1039, Triple Play 1021, Bundle Total 2060)

Most mobile users say they know their mobile data allowance and are confident in understanding their mobile data needs

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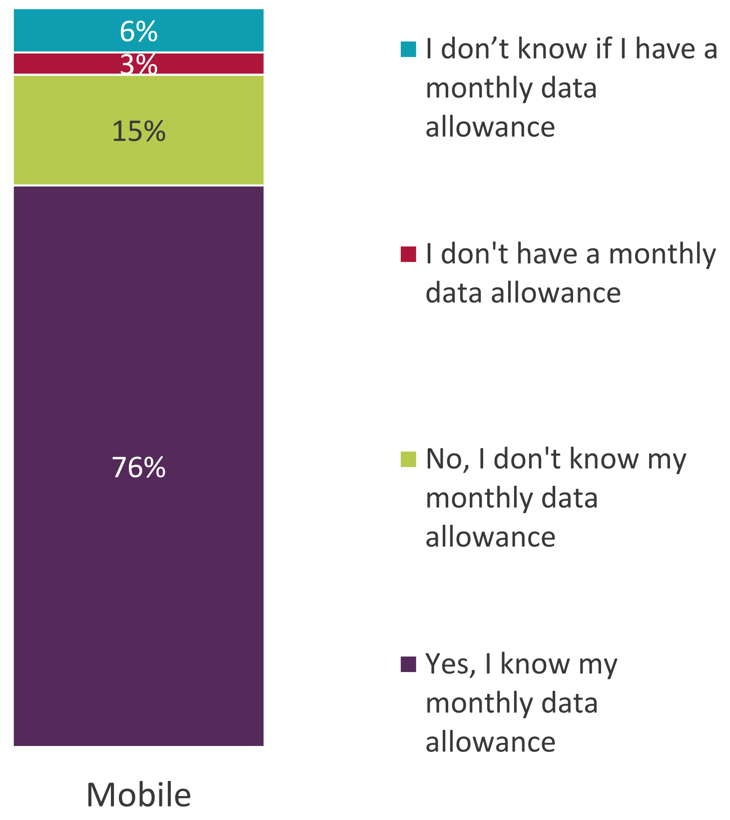
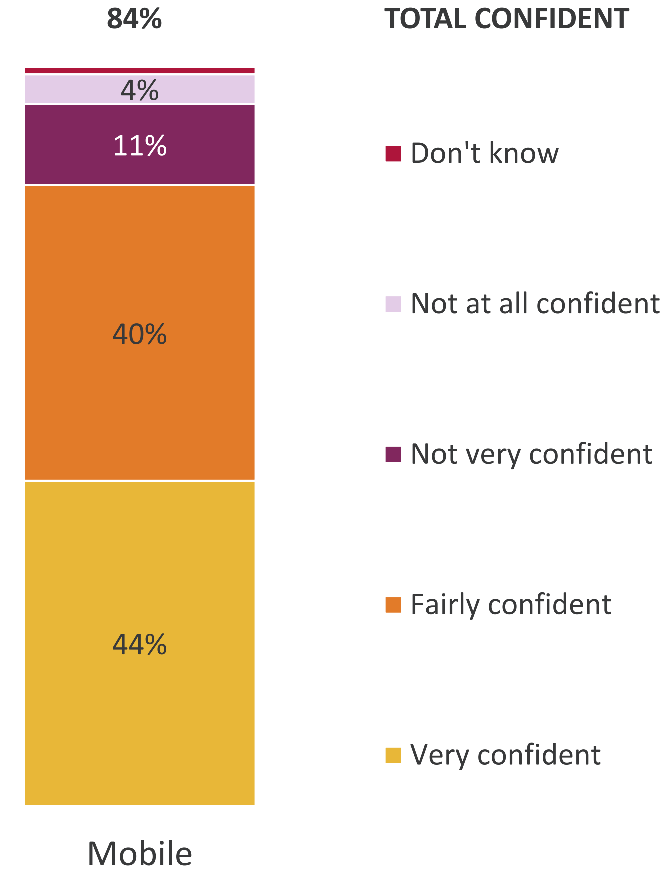
Knowledge of mobile data allowance and confidence in understanding mobile data needs





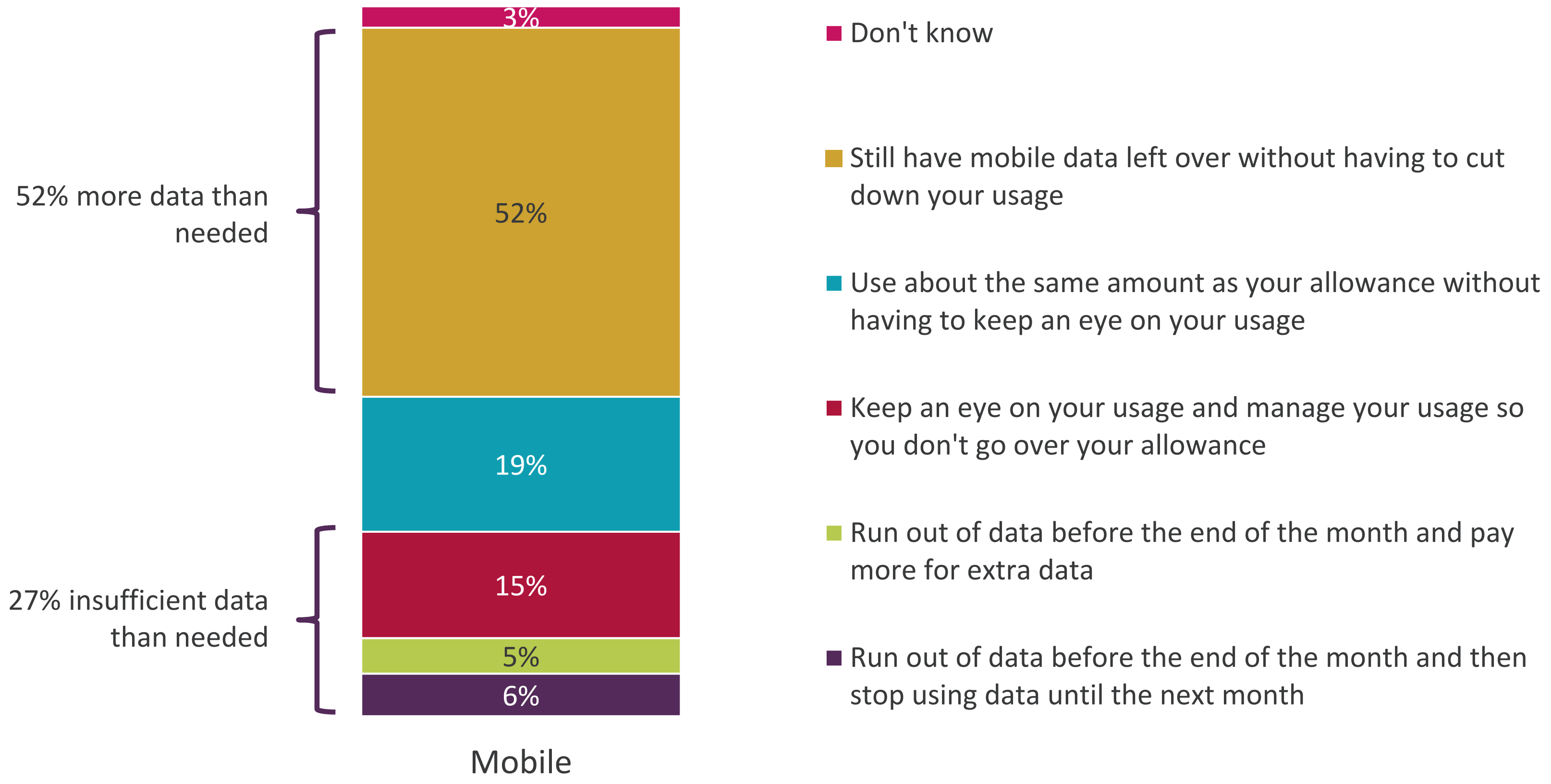
Source: Ofcom Consumer Engagement 2018

Q30. Do you know how much data is included in your mobile package each month?/ Q31. How confident are you that you understand how much mobile data you ideally need each month?

Base: All Mobile (except Pay As You Go) (799)/ All Mobile (except Pay As You Go) who believe they have a data allowance (723)

Mobile users are more likely to have a data allowance that is more than they need than to have insufficient data

Mobile data usage



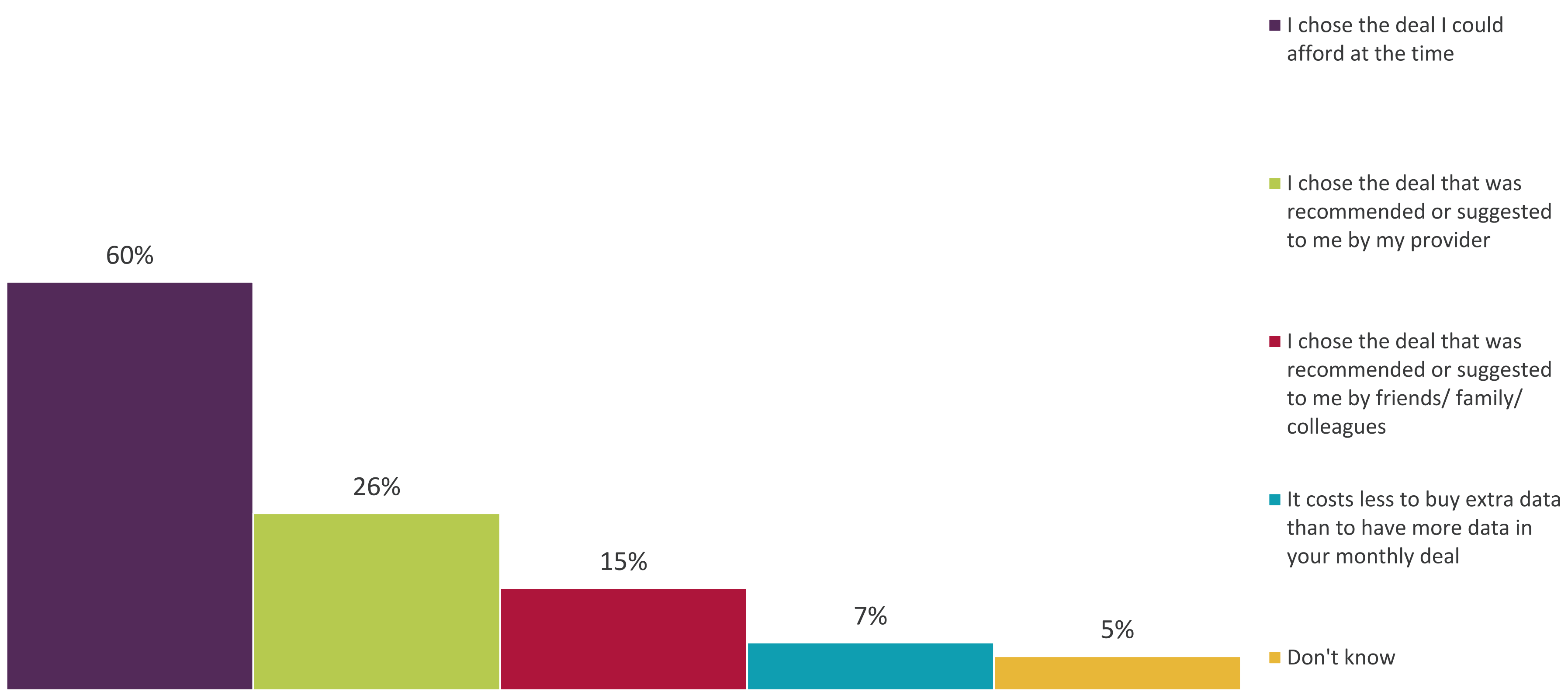
Source: Ofcom Consumer Engagement 2018

Q32. In most months would you say you...

Base: All Mobile (except Pay As You Go) who believe they have a data allowance (723)

Those with insufficient data are most likely to say this was based on what they could afford

Reasons for getting a mobile contract with less data than need



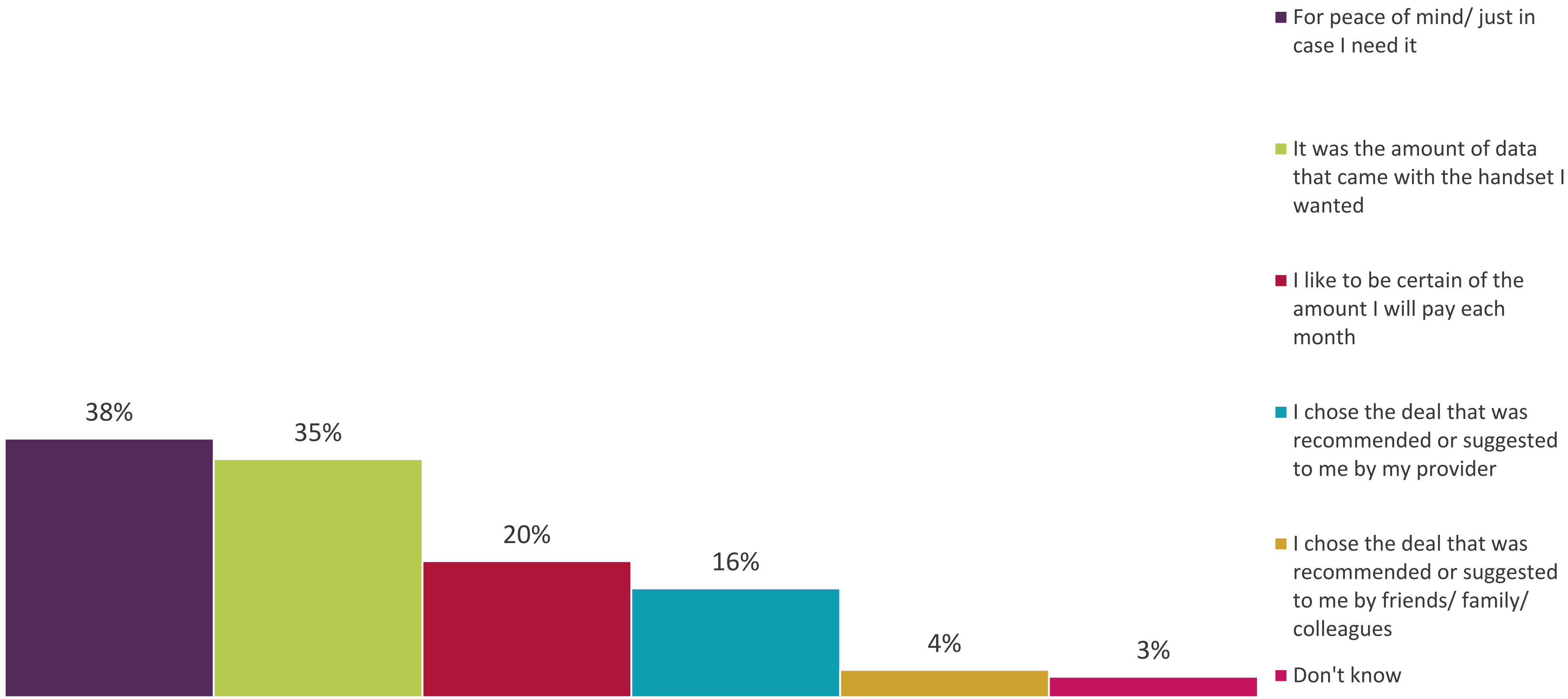
Source: Ofcom Consumer Engagement 2018

Q33. Why did you get a mobile phone deal with less mobile data than you need?

Base: All Mobile (except Pay As You Go) who believe they have a data allowance and who run out of or need to manage their use of data before the end of the month (178)

For those with more data than needed this is likely to be either 'just in case' or part of the deal that came with the handset

Reasons for getting a mobile contract with more data than need



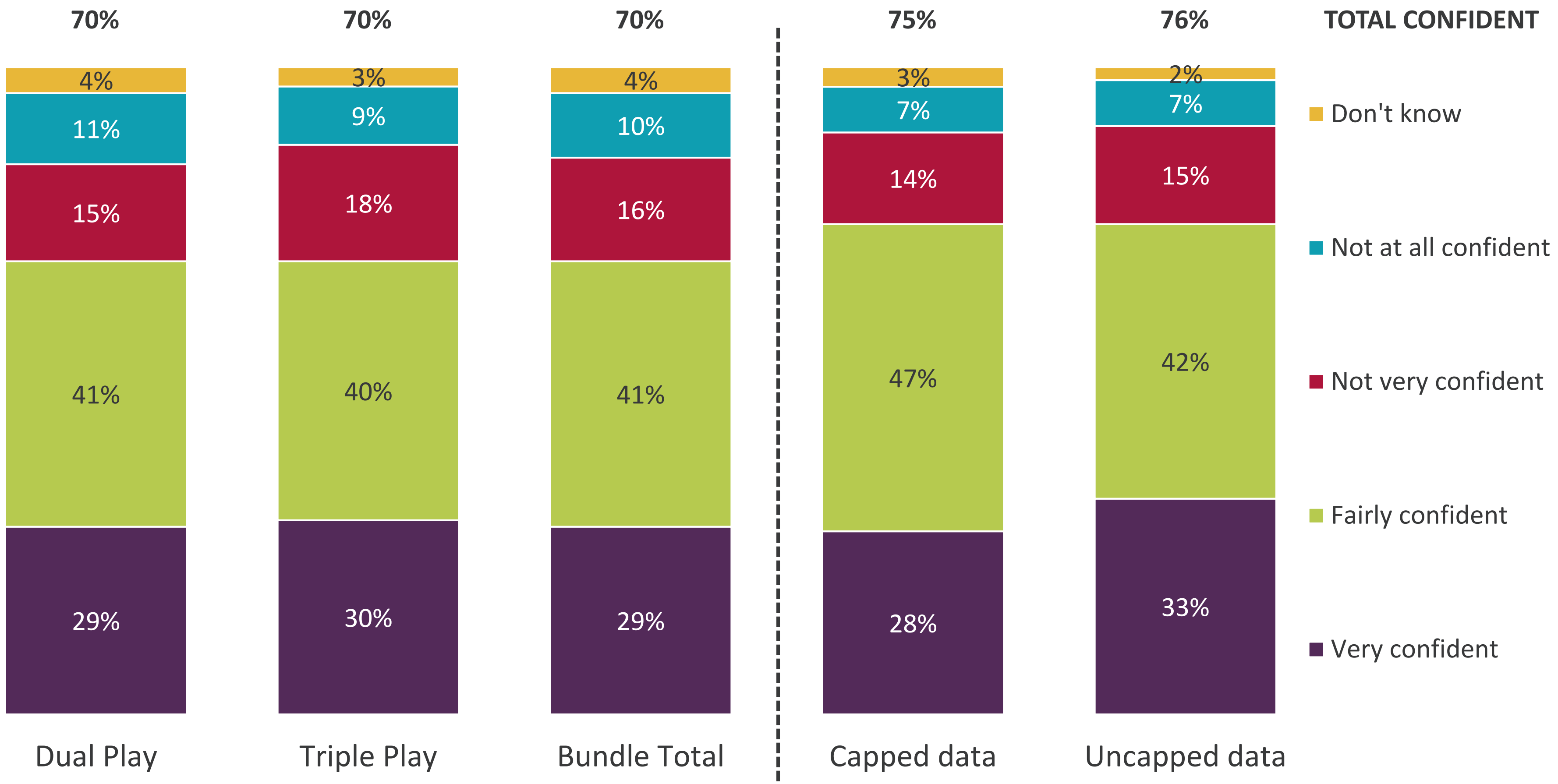
Source: Ofcom Consumer Engagement 2018

Q34. Why did you get a mobile phone deal with more mobile data than you need?

Base: All Mobile (except Pay As You Go) who believe they have a data allowance and who have data left over from their allowance at the end of the month (389)

While most say they are confident understanding their broadband speed requirements, few are very confident about this

Confidence in understanding household's broadband speed requirement – by market



Source: Ofcom Consumer Engagement 2018

Q36. How confident are you that you understand what broadband speed your household needs?

Base: All Dual play and Triple Play (Dual Play 1039, Triple Play 1021, Bundle Total 2060), all responding that their household has a fixed monthly data allowance/ capped (169), unlimited broadband/ uncapped (1584)

In addition to past and future costs, data usage was also considered by many when taking out their current mobile contract

Aspects considered when taking out current contract – in contract, mobile

	Mobile
How much you had been paying each month	70%
How much data you were using each month	54%
How many minutes or calls you were using each month	42%
How many texts you were sending each month	36%
What types of internet/ online activities you were using mobile data for	23%
What types of numbers you were calling at the time	15%
TOTAL USAGE	**89%**
How much you would pay each month	65%
How much mobile data you would get each month	43%
How many minutes for calls you would get each month	37%
The upfront cost of the handset	35%
The deals available for the handset you wanted	35%
How many texts would be included in your allowance each month	33%
What added extras would be included	13%
TOTAL DEAL	**84%**
Coverage and reliability	56%
Reputation/ good customer service	38%
TOTAL SERVICE	**65%**

Source: Ofcom Consumer Engagement 2018
Q42. When you took your current mobile phone deal with (PROVIDER), which of these factors did you consider at that time?
Base: All responding about their Mobile who are in contract for their service, including those on a SIM only deal (Mobile 728)

Future costs and channel availability are the most likely aspects to be considered when taking out a new TV or bundle contract

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Aspects considered when taking out current contract – in contract, by market

	Standalone Pay TV	Dual Play	Triple Play	Bundle Total
How much you had been paying each month	60%	70%	71%	71%
Which TV channels you or your household were watching at the time	61%	NA	44%	23%
Types of internet activities you or your household was using broadband for	NA	33%	33%	33%
How many calls you were making each month	NA	29%	29%	29%
How much data you were downloading or using each month	NA	28%	29%	28%
How many devices were accessing the internet at the same time	NA	26%	27%	27%
What types of numbers you were calling at the time	NA	23%	19%	21%
TOTAL USAGE	**82%**	**87%**	**89%**	**88%**
How much you would pay each month	77%	74%	69%	71%
Which TV channels would be included	71%	NA	49%	26%
Any upfront cost of equipment	33%	36%	41%	39%
Whether the data was unlimited or capped	NA	54%	44%	49%
What added extras would be included	35%	15%	25%	20%
The calls package	NA	38%	34%	36%
The advertised speed of the broadband service	NA	33%	32%	32%
TOTAL DEAL	**93%**	**88%**	**86%**	**87%**
Reliability of service	64%	63%	64%	64%
Reputation/ good customer service	43%	39%	43%	41%
Download speeds you were getting at the time	NA	40%	42%	41%
TOTAL SERVICE	**72%**	**75%**	**77%**	**76%**

Source: Ofcom Consumer Engagement 2018
Q42. When you took your current mobile phone deal with (PROVIDER), which of these factors did you consider at that time?
Base: All who are in contract for their service (Standalone Pay TV 618, Dual Play 683, Triple Play 698, Bundle Total 1381)

Section 5
Pricing and savings

While most don’t know what they could save by signing up to a new deal (with current or an alternative provider), estimated average is around £10

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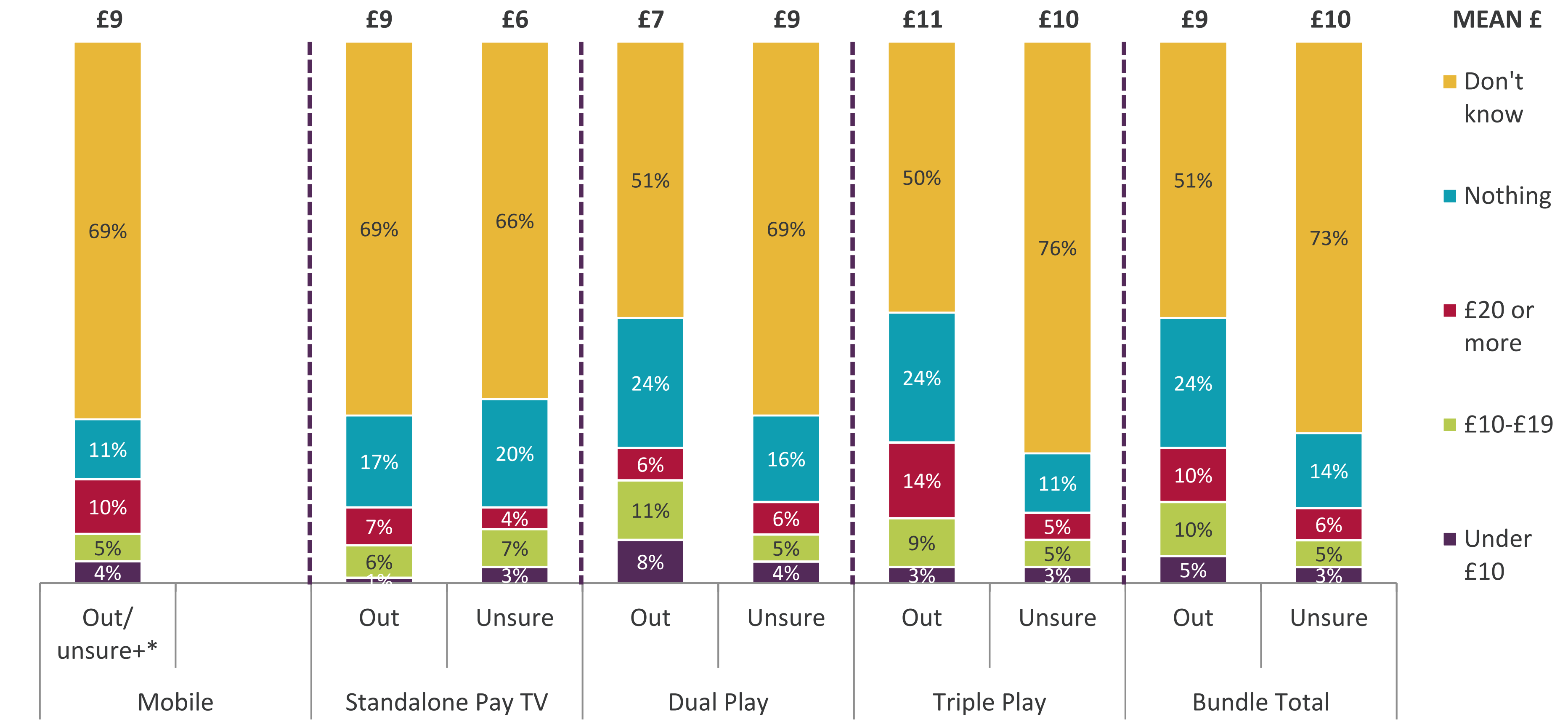
Amount of possible savings from signing up to a new deal – out of contract/ unsure if in contract, by market



Source: Ofcom Consumer Engagement

Q27. Compared to what you are paying now, how much do you think you could save (per month) by signing up to a new contract (DUAL, TRIPLE OR PAY TV) for your (SERVICE) with either your current provider or an alternative provider? Please give your best estimate if you’re not sure.

Base: All who think they are out of contract (Mobile, with handset 51+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)/ Base: All who are unsure whether or not they are in contract (Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301) *Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

A significant minority out of contract don’t know what saving would encourage them to take a new deal.

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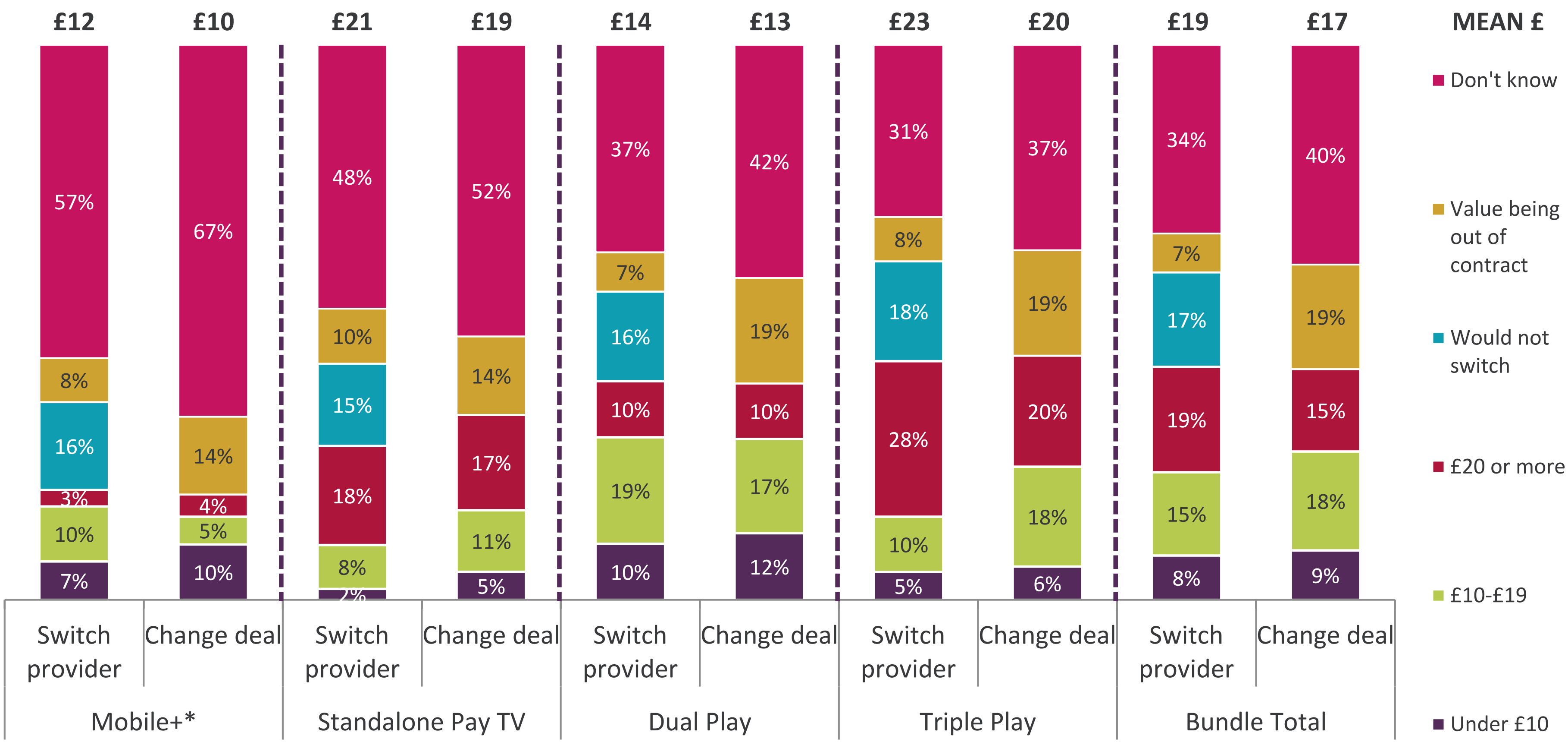
Amount of saving that would encourage switching provider/ signing up to a new deal with current provider – out of contract, by market



Source: Ofcom Consumer Engagement

Q28. Compared to what you are paying now, how much cheaper (per month) would a similar deal (DUAL, TRIPLE OR PAY TV) from an alternative provider need to be to encourage you to switch provider for your (SERVICE)?/ Q29. And compared to what you are paying now, how much cheaper (per month) would a similar deal (DUAL, TRIPLE OR PAY TV) from your existing provider need to be to encourage you to change your deal? Base: All who think they are out of contract (Mobile 89+*, Standalone Pay TV 182, Dual Play 199, Triple Play 179, Bundle Total 378)
*Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

Mean £ calculation based on all who gave an amount, i.e. EXCLUDING those who said “Would not switch”, “Cost does not matter” or “Don’t Know”

Most who are unsure of their contract status don't know what saving would encourage them to take a new deal

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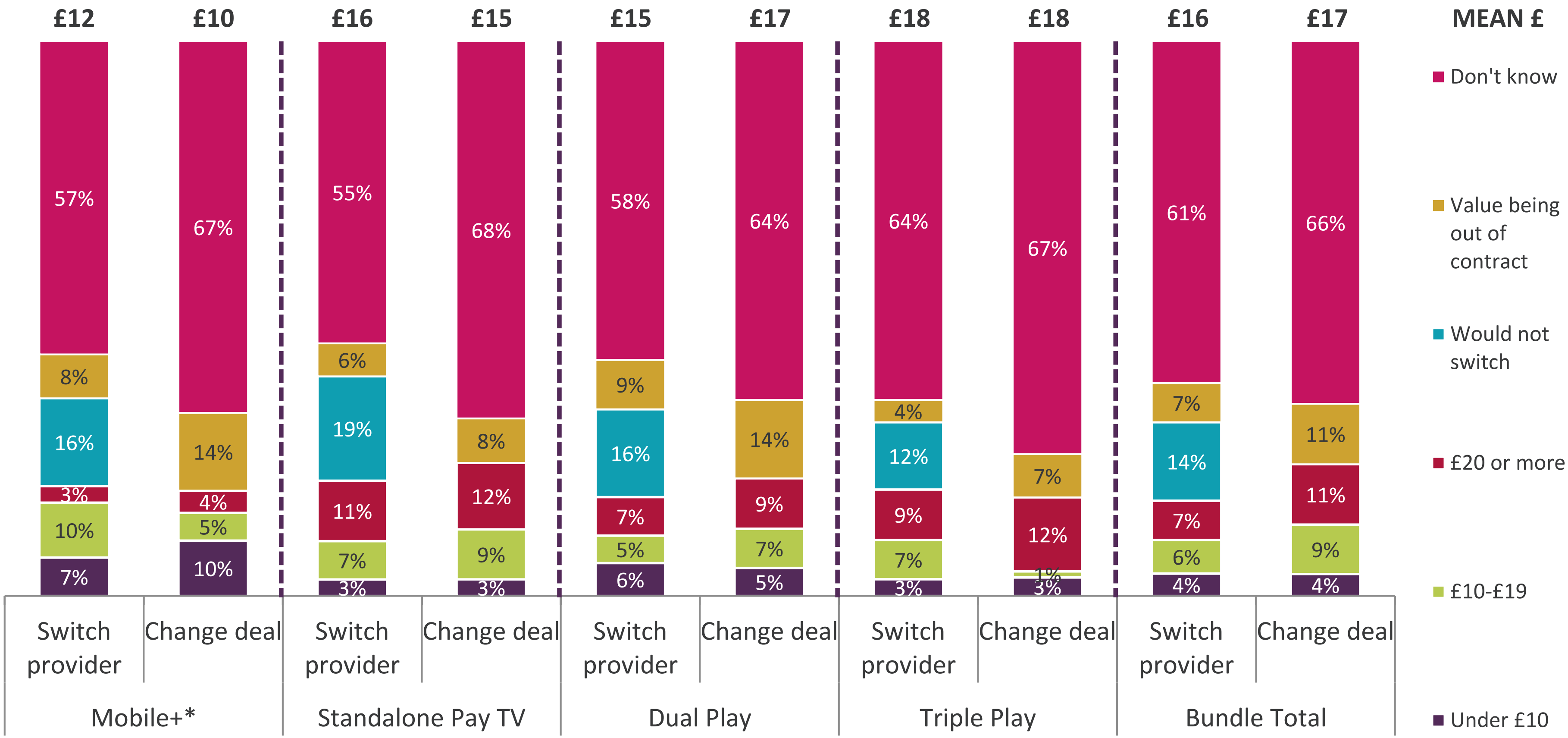
Amount of saving that would encourage switching provider/ signing up to a new deal with current provider – unsure if in contract, by market



Source: Ofcom Consumer Engagement

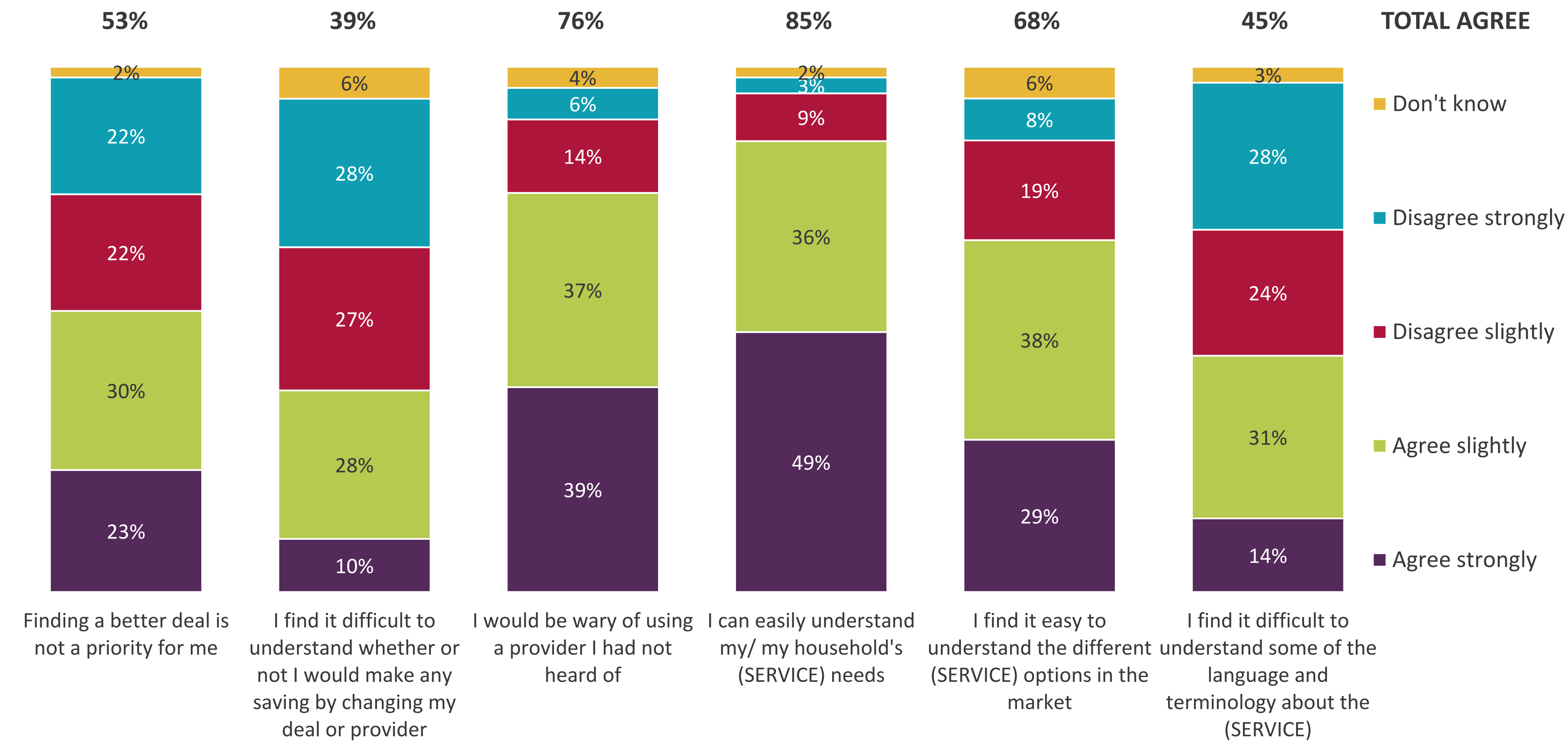
Q28. Compared to what you are paying now, how much cheaper (per month) would a similar deal (DUAL, TRIPLE OR PAY TV) from an alternative provider need to be to encourage you to switch provider for your (SERVICE)?/ Q29. And compared to what you are paying now, how much cheaper (per month) would a similar deal (DUAL, TRIPLE OR PAY TV) from your existing provider need to be to encourage you to change your deal? Base: All who are unsure whether or not they are in contract (Mobile 89+*, Standalone Pay TV 146, Dual Play 157, Triple Play 144, Bundle Total 301) *Caution: Low base, treat as indicative only. +Mobile combines out of contract (45) and unsure (44)

Mean £ calculation based on all who gave an amount, i.e. EXCLUDING those who said "Would not switch", "Cost does not matter," or "Don't Know"

Appendix 1
Attitudinal statements

Attitudes towards comparing deals in each market

Attitudes towards comparing deals in each market – Mobile



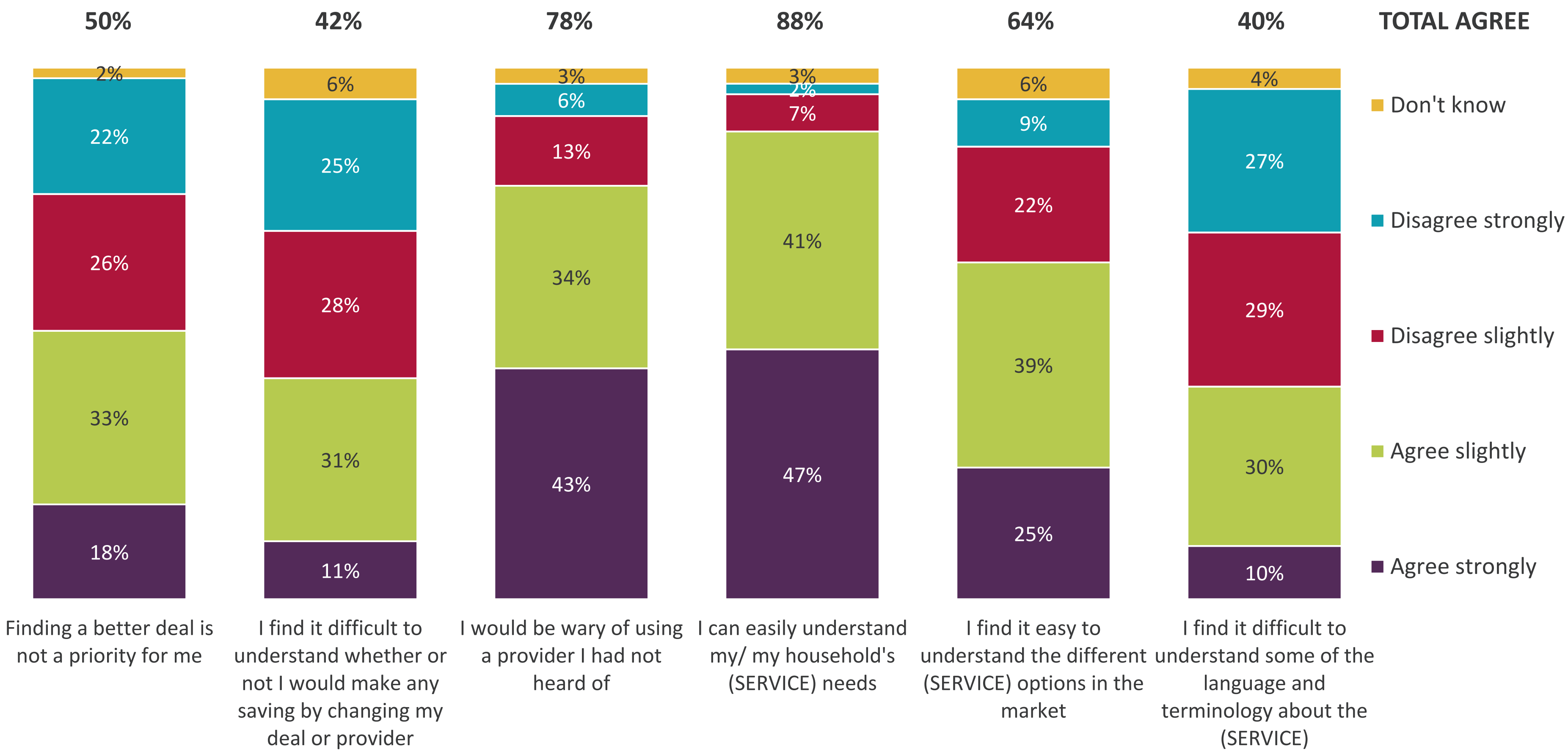
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Mobile (1136)

Attitudes towards comparing deals in each market

Attitudes towards comparing deals in each market – Standalone Pay TV



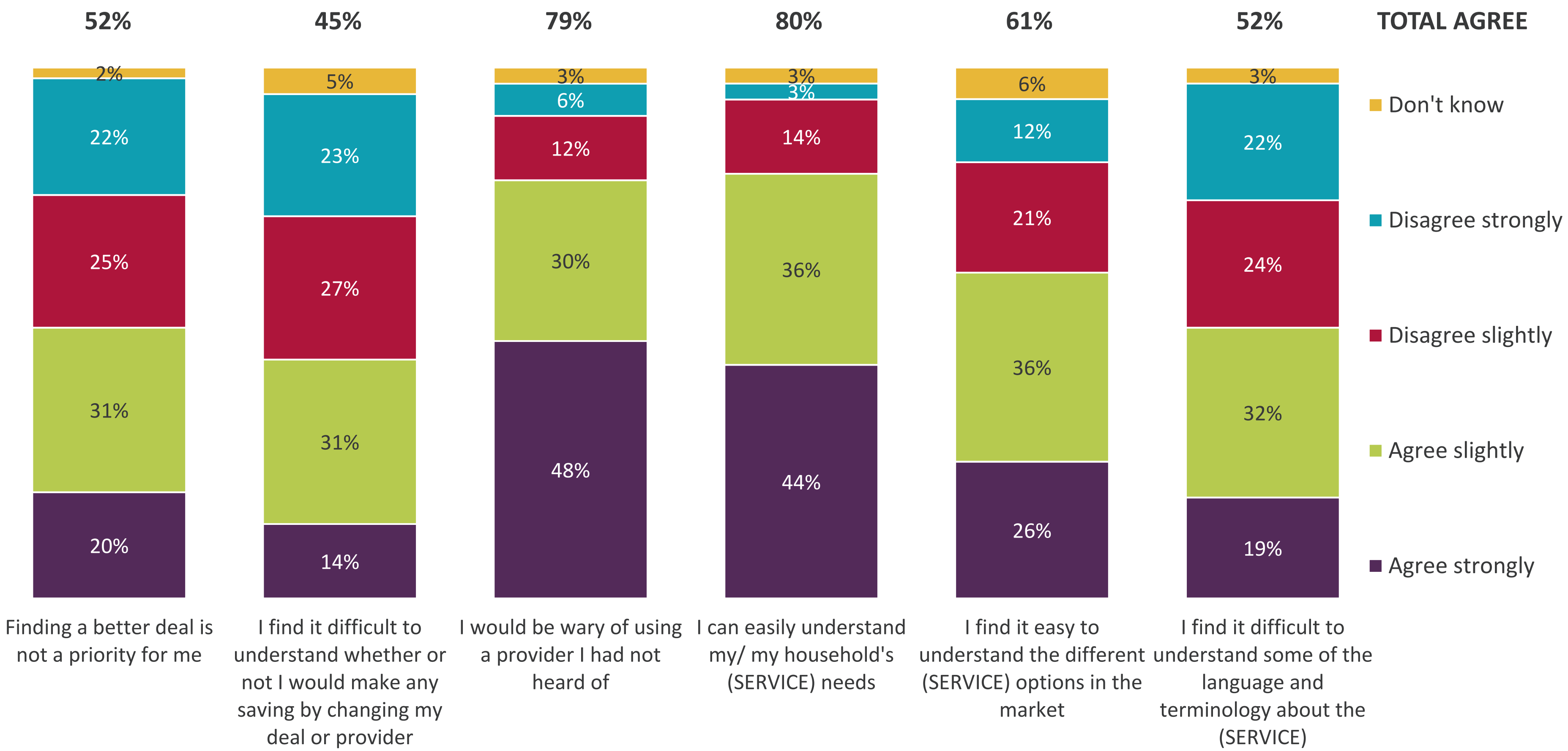
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Standalone Pay TV (1024)

Attitudes towards comparing deals in each market

Attitudes towards comparing deals in each market – Dual play



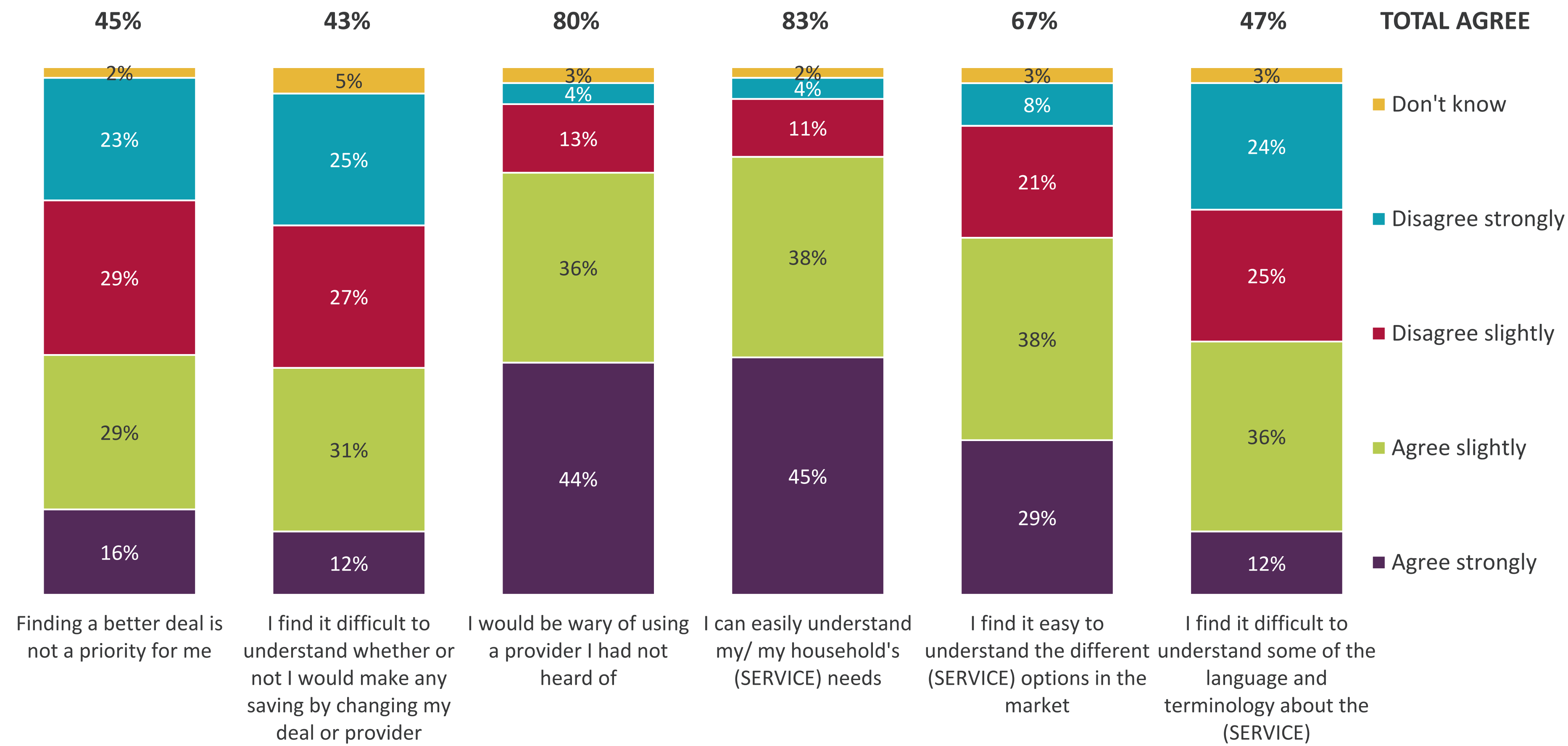
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Dual play (1039)

Attitudes towards comparing deals in each market

Attitudes towards comparing deals in each market – Triple play



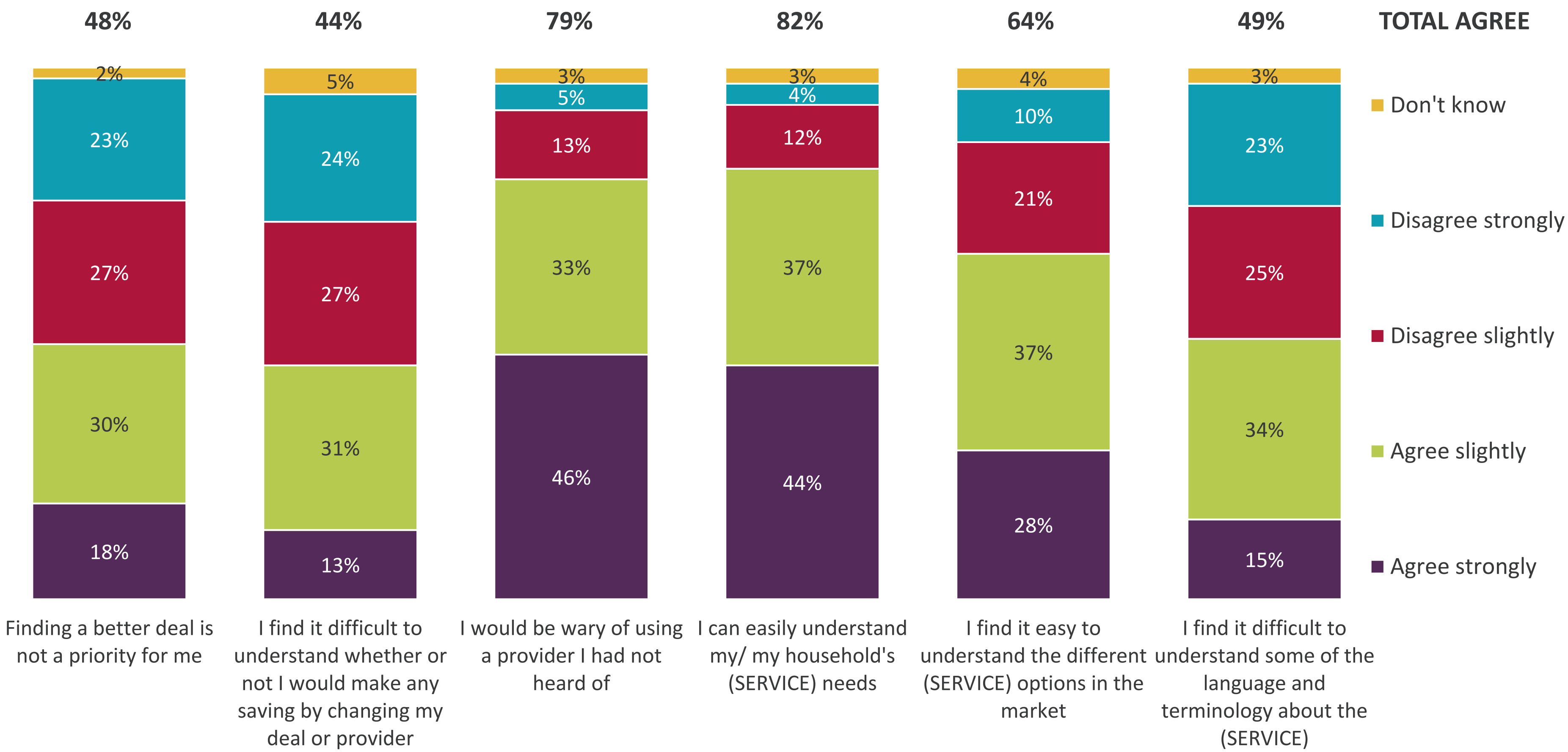
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Triple play (1021)

Attitudes towards comparing deals in each market

Attitudes towards comparing deals in each market – Bundle total



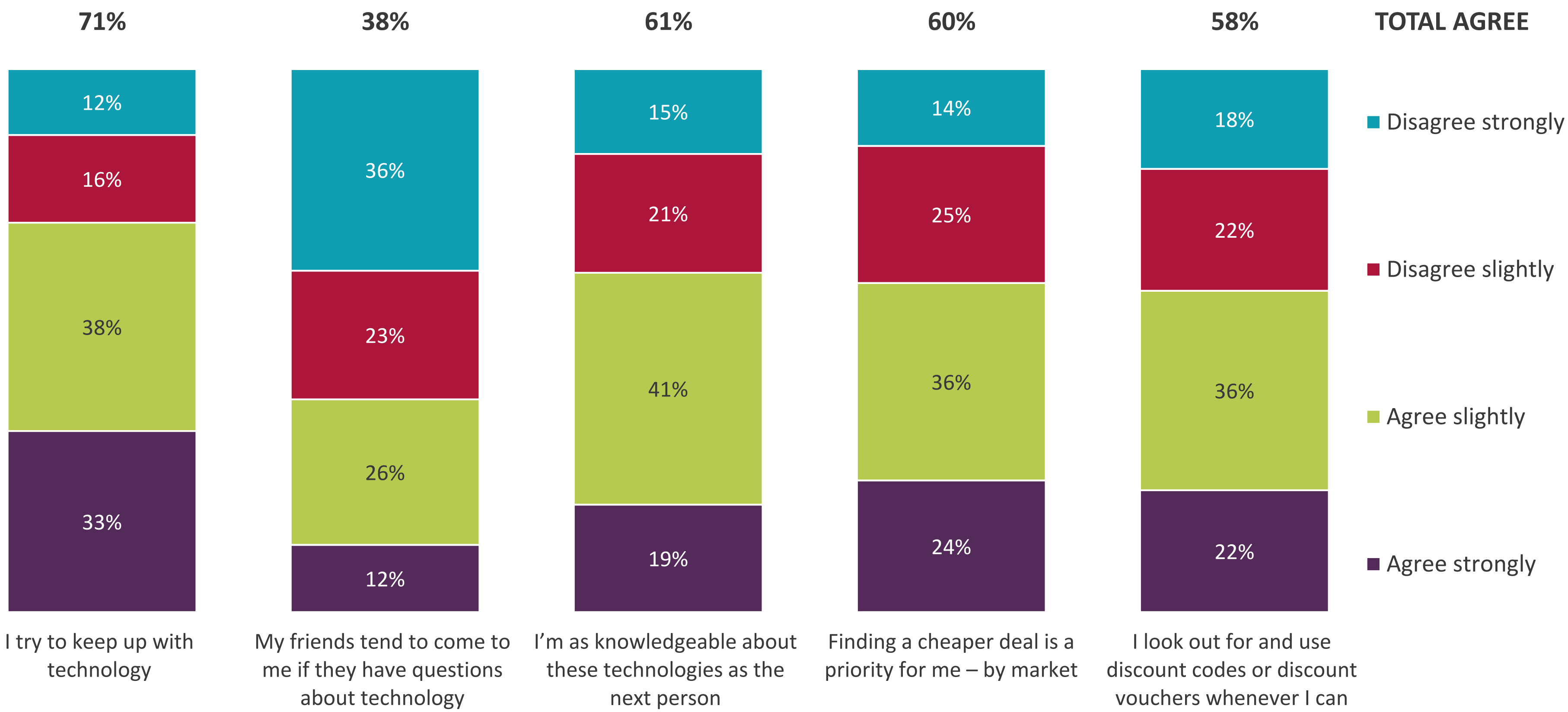
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Bundle total (2060)

Attitudes towards technology services

Attitudes towards technology services in each market – Mobile



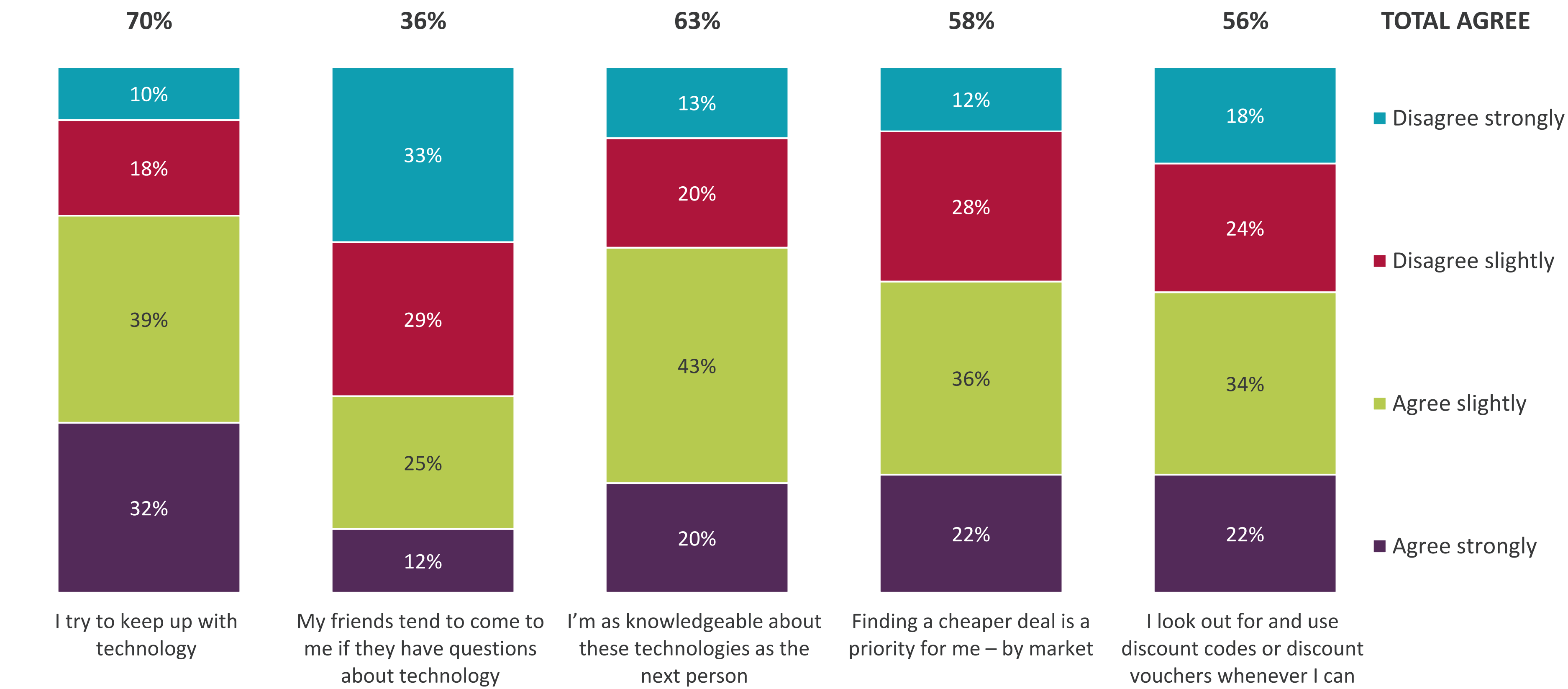
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Bundle total (2060)

Attitudes towards technology services

Attitudes towards technology services in each market – Standalone Pay TV



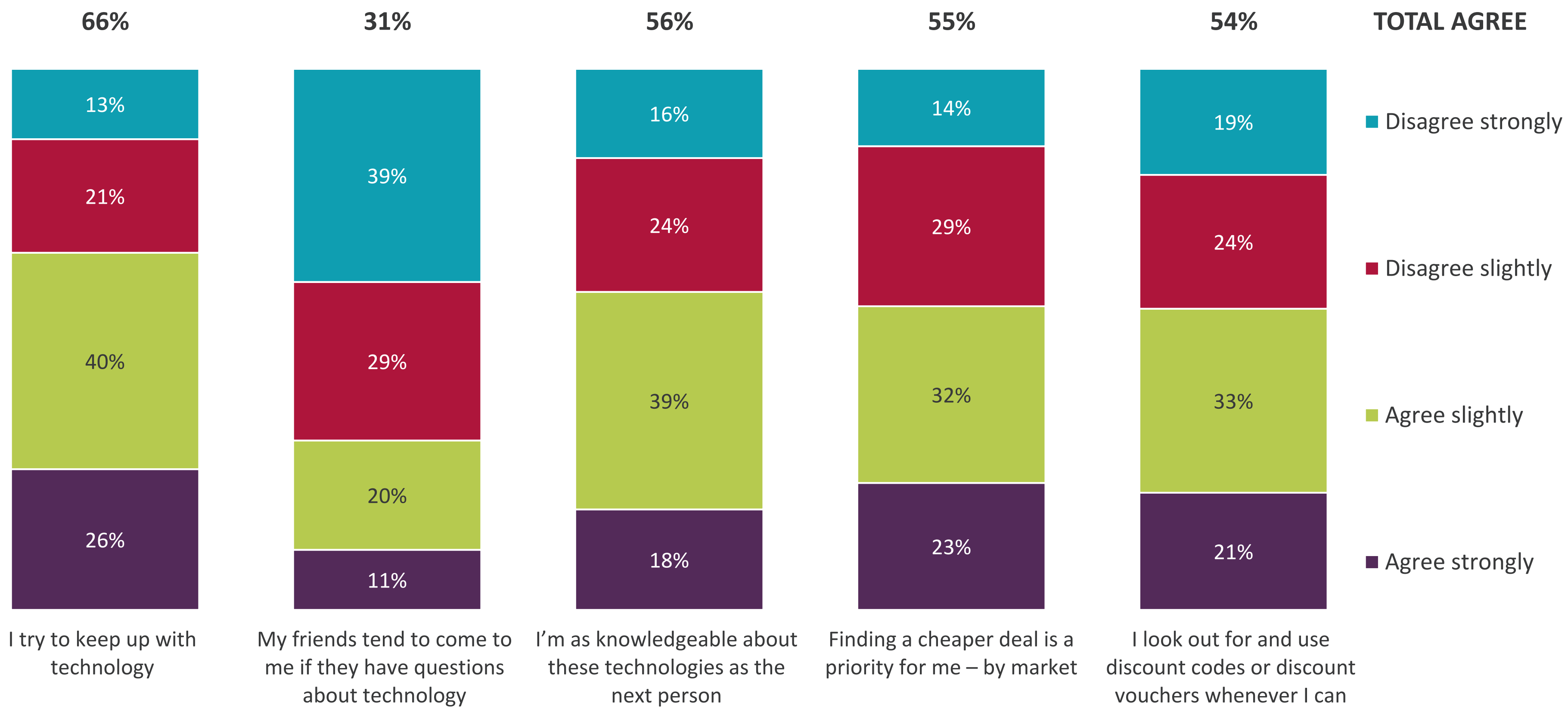
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Bundle total (2060)

Attitudes towards technology services

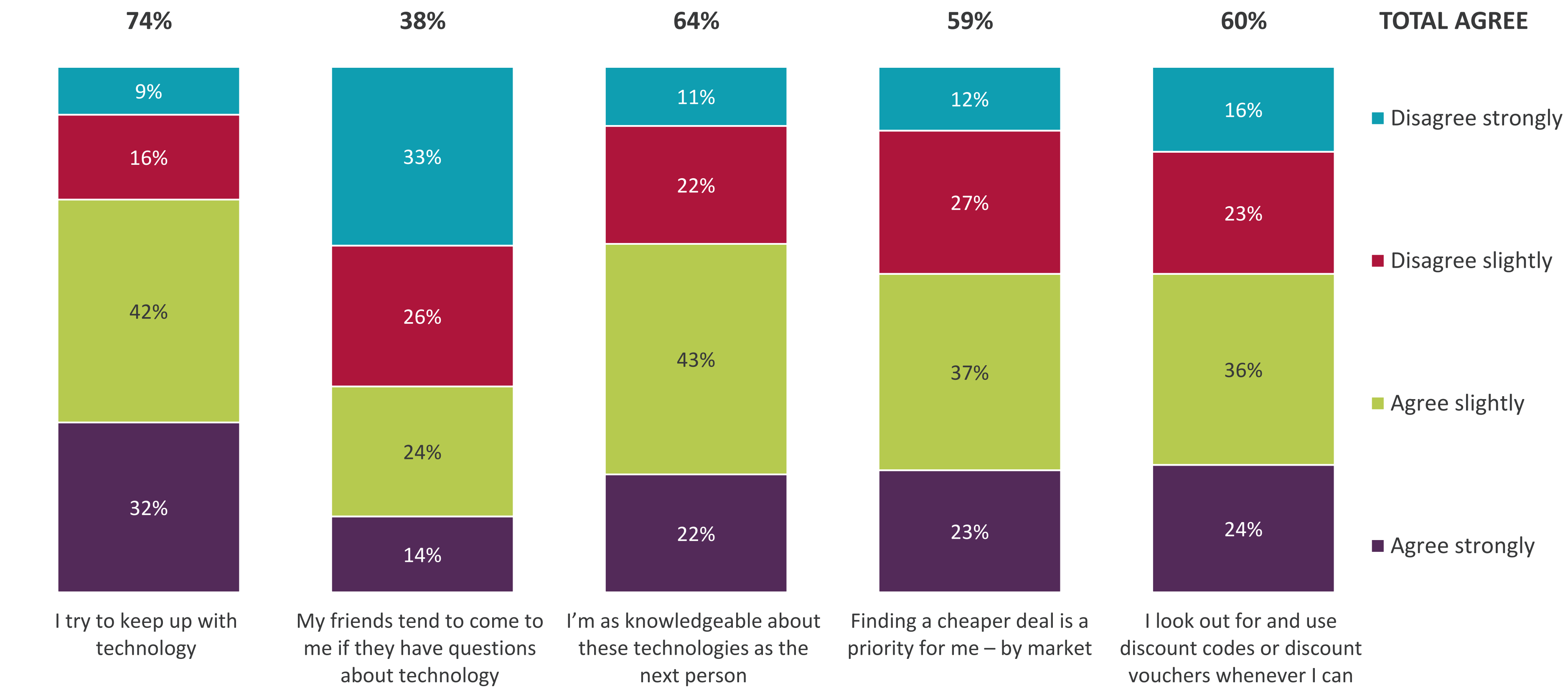
Attitudes towards technology services in each market – Dual play



Source: Ofcom Consumer Engagement 2018
Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?
Base: All Bundle total (2060)

Attitudes towards technology services

Attitudes towards technology services in each market – Triple play



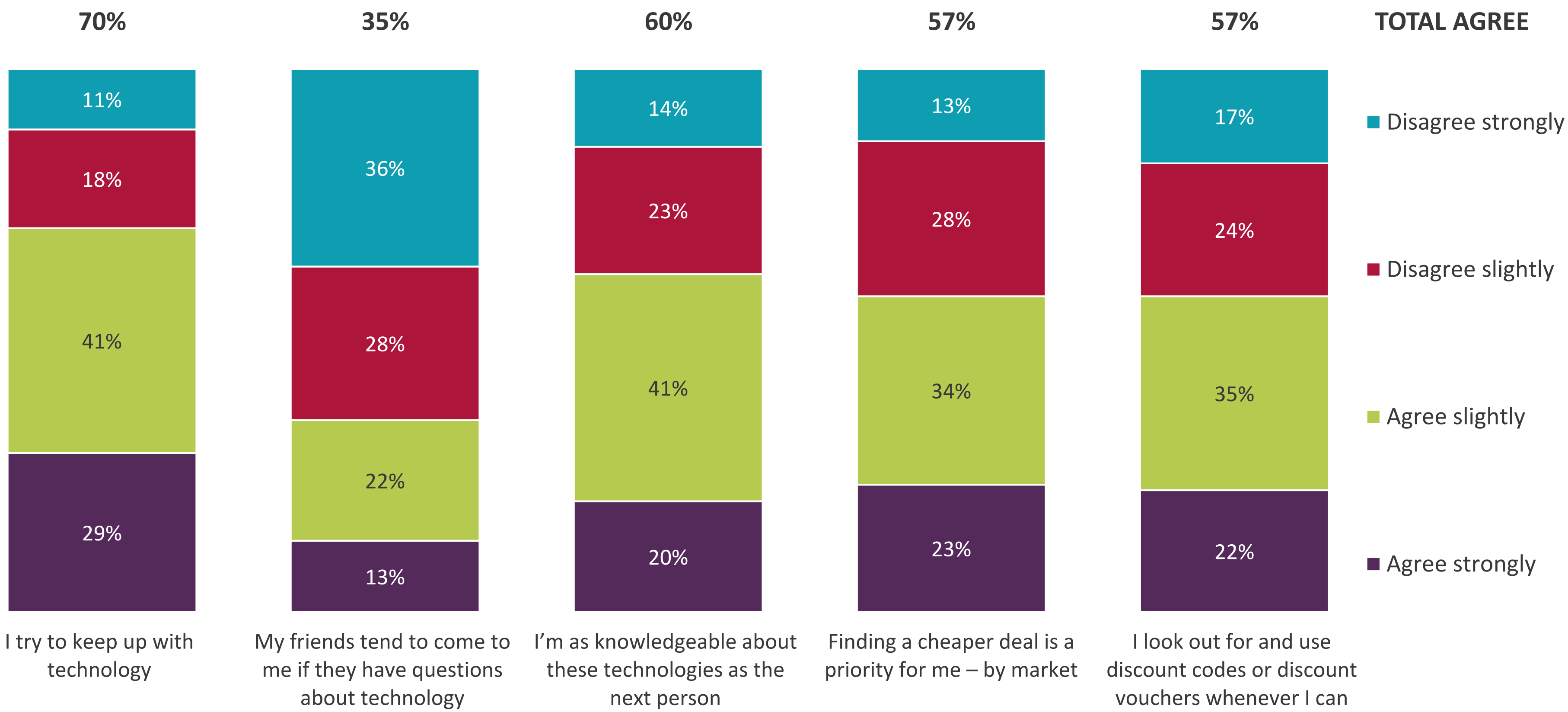
Source: Ofcom Consumer Engagement 2018

Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Bundle total (2060)

Attitudes towards technology services

Attitudes towards technology services in each market – Bundle total



Source: Ofcom Consumer Engagement 2018

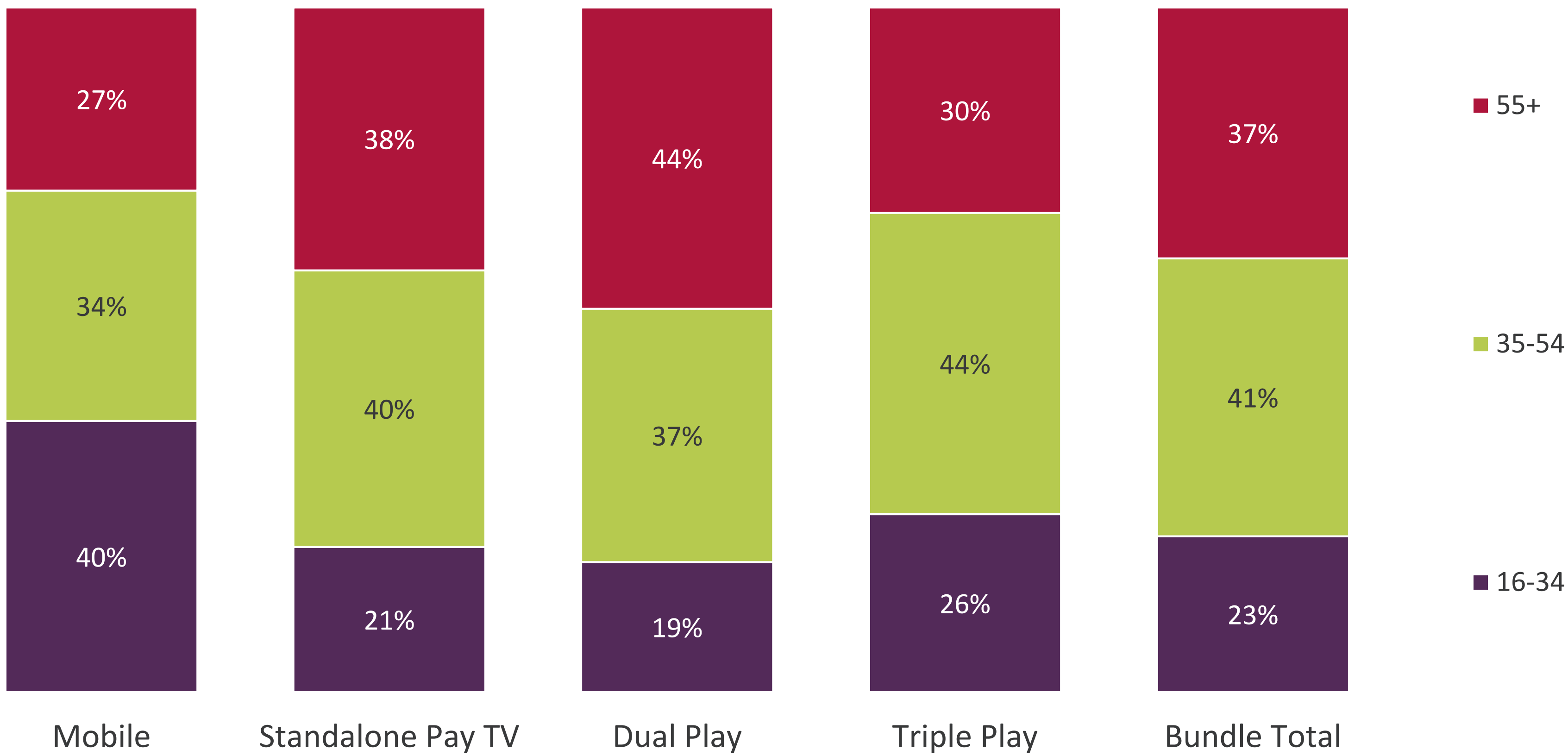
Q41a-f. To what extent do you agree or disagree with the following statements about comparing (SERVICE) deals in the market?

Base: All Bundle total (2060)

Appendix 2
Sample Profile

Age

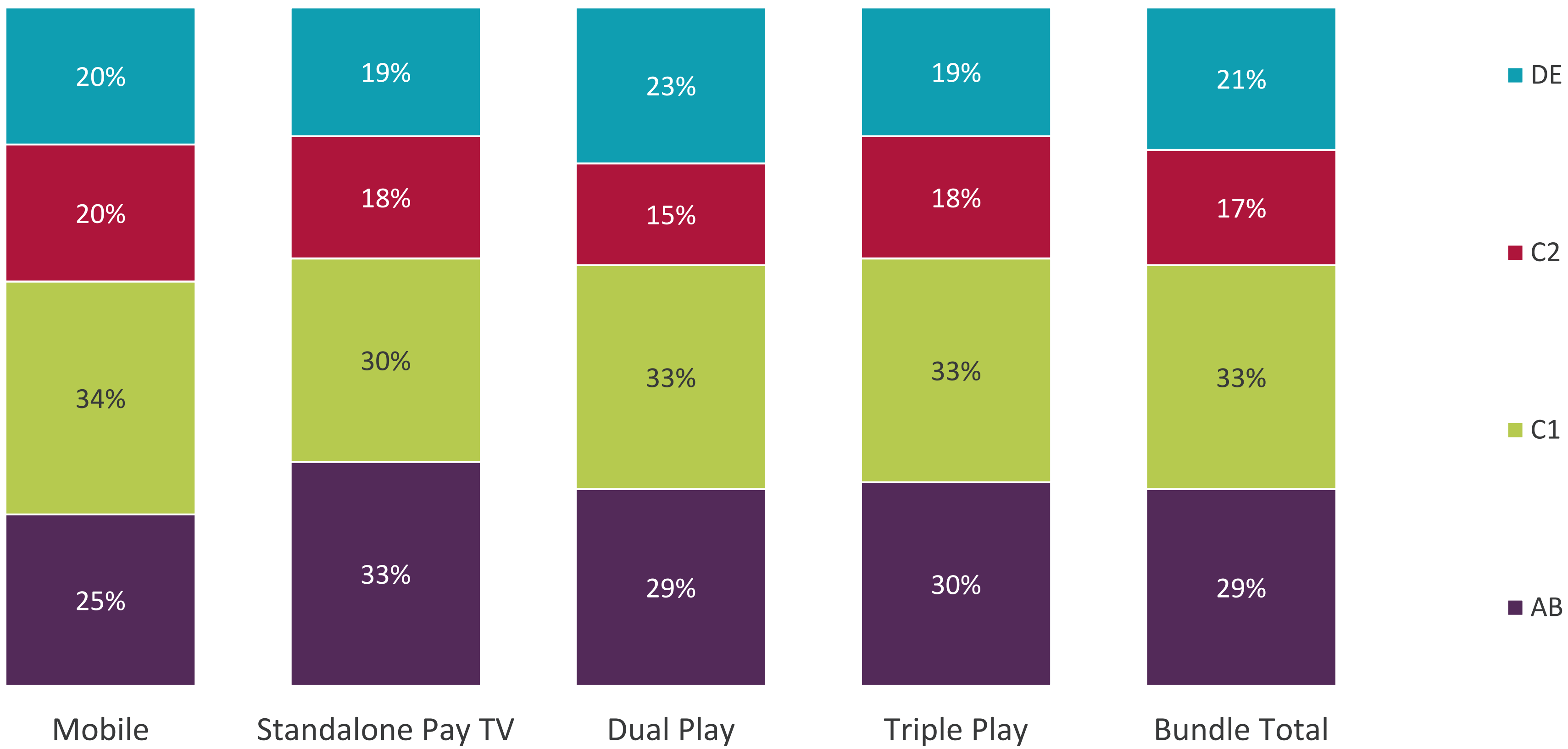
Age – by market



Source: Ofcom Consumer Engagement 2018
S10. How old are you?
Base: All (Mobile 1136, Standalone Pay TV 1024, Dual Play 1039, Triple Play 1021, Bundle Total 2060)

Household socio-economic group

Household socio-economic group – by market



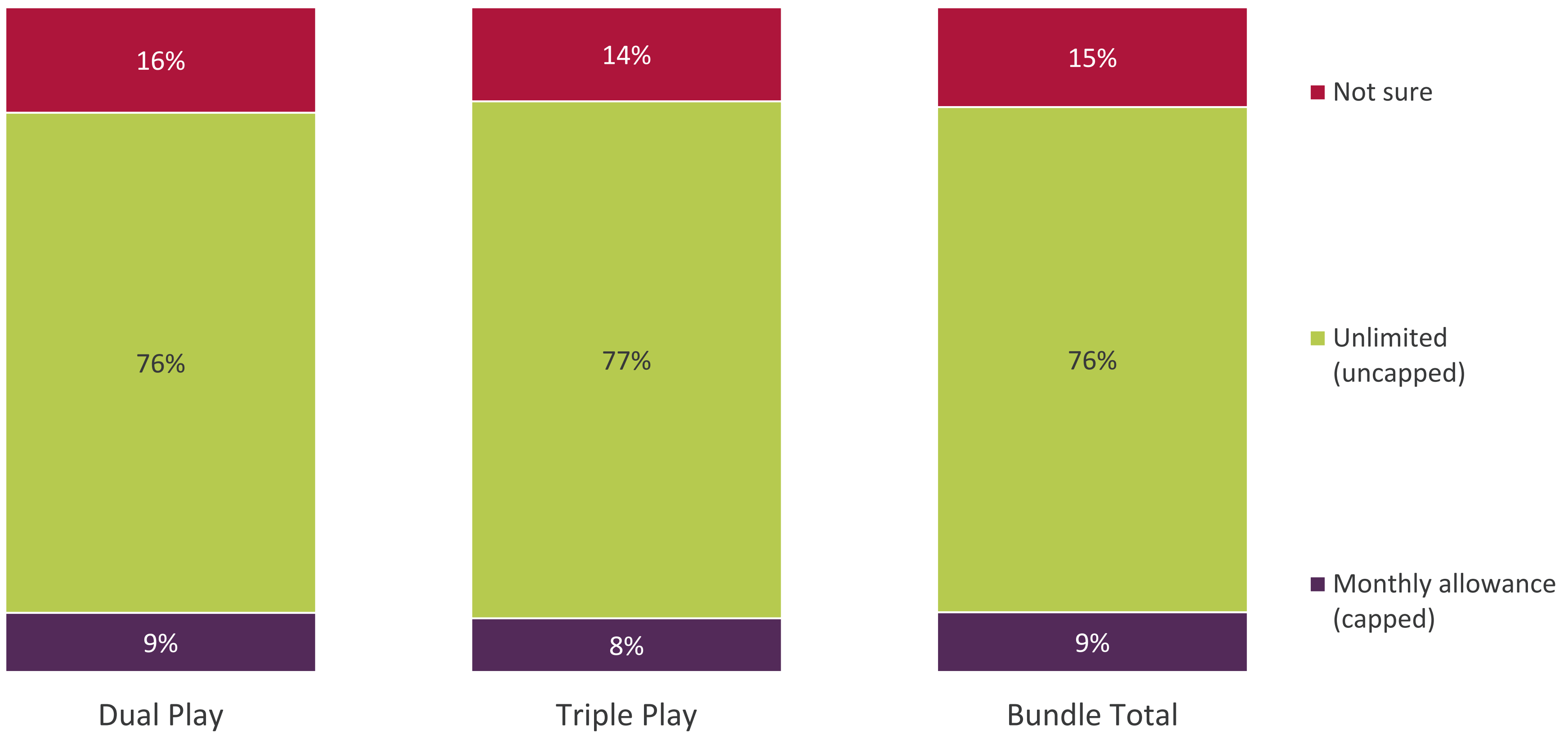
Source: Ofcom Consumer Engagement 2018

S14. What is the occupation of the main wage earner in the household?

Base: All (Mobile 1136, Standalone Pay TV 1024, Dual Play 1039, Triple Play 1021, Bundle Total 2060)

Few broadband users say their monthly allowance is capped

Type of broadband – by market



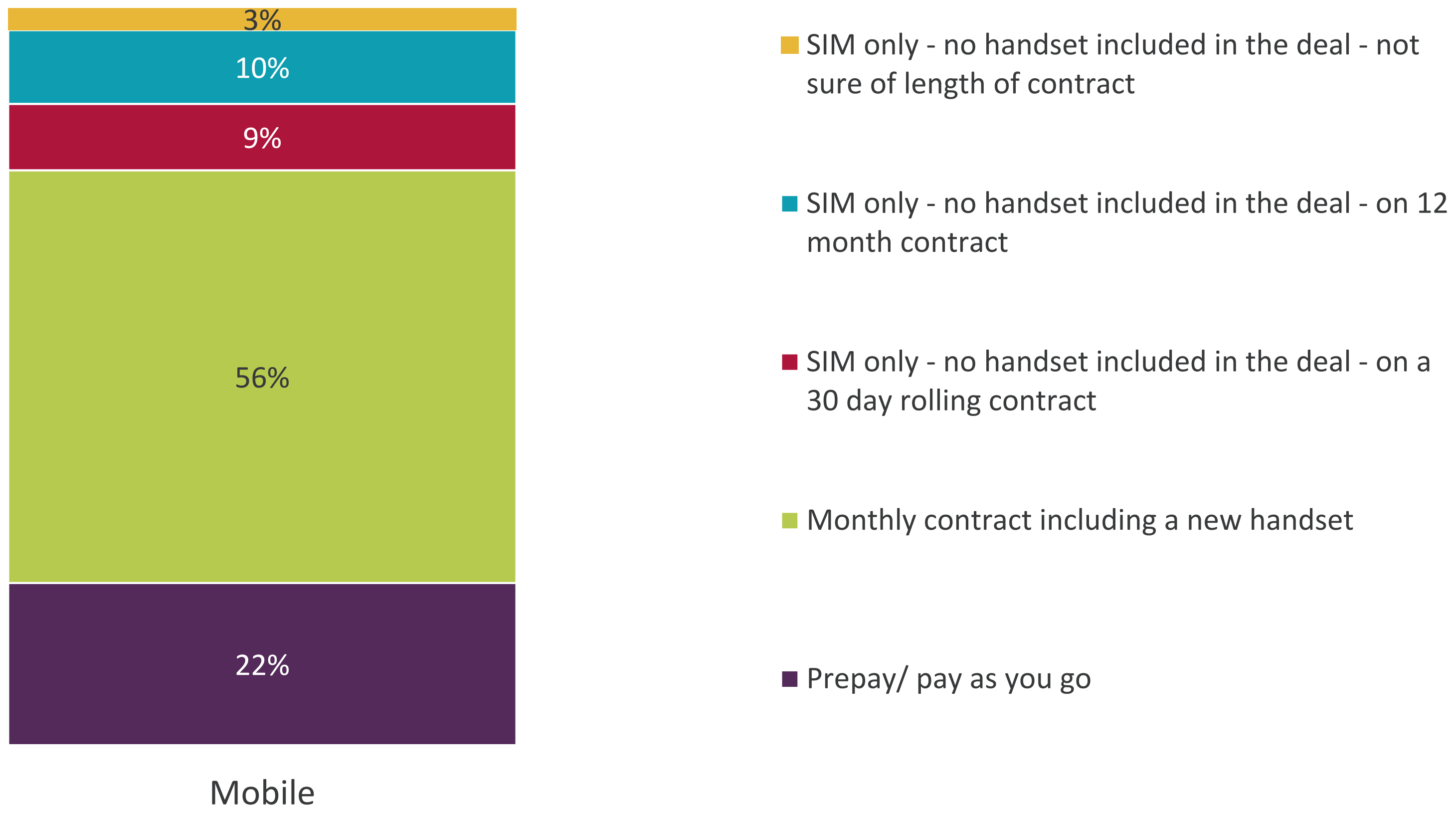
Source: Ofcom Consumer Engagement 2018

Q35. Thinking about your broadband service, do you have a fixed monthly data allowance (also known as capped), or is your contract for unlimited broadband (also known as uncapped)?

Base: All Dual play and Triple Play (Dual Play 1039, Triple Play 1021, Bundle Total 2060)

Most with a mobile have a monthly contract that came with a new handset – the remainder equally shared between PAYG and SIMO

Mobile phone package

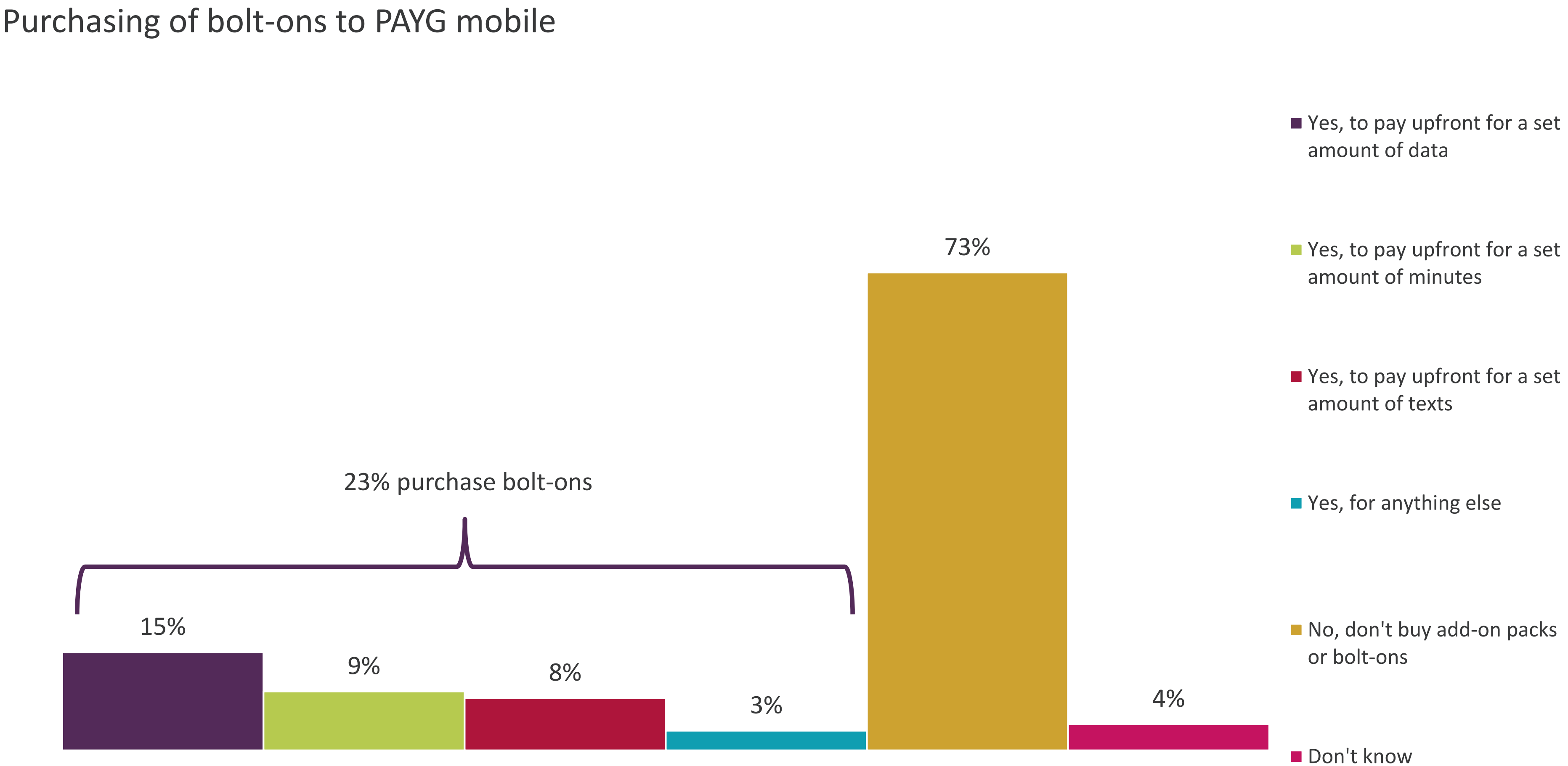


Source: Ofcom Consumer Engagement 2018

S4. Which of these best describes the mobile phone package you personally use most often?/ S5. Which of the following best describes the deal that you are paying for now for your mobile phone?

Base: All Mobile (1136)

Purchasing of bolt-ons to PAYG mobile



Source: Ofcom Consumer Engagement 2018

Q30b. Do you ever buy add-on packs or bolt-ons from (PROVIDER) to get extra data, minutes or texts for your pay as you go phone?

Base: All Mobile using Pay As You Go (337)