Communications Market Special Report

Ethnic minority groups and communications services

Research Document

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Section 1

Introduction

1.1 Overview

Ofcom has conducted research to explore how the citizen and consumer interests of people from ethnic minority groups (EMGs) are being met in relation to availability, take-up and consumption of communications services, and to investigate attitudes towards these services. The research looked at three communications services: television, telecoms (fixed line and mobile) and internet.

The topics explored reflect Ofcom's statutory duty to further the interests of citizens and consumers, where appropriate by encouraging competition and duties to secure the availability of a wide range of electronic communication, television and radio services. The report also reflects Ofcom's specific duty under section 3(4)(l) to have regard, in performing its duties, to the different interests of ethnic minority communities within the UK.

1.2 Report structure

In order to put the research in context, the report begins by looking at the differences in demographic profiles of EMGs in the UK and the general population. It then looks at the three communications services of television, telecoms (fixed-line and mobile) and internet. The areas of take-up, levels of usage and spend are explored. Within the chapter on television, viewing trends are looked at in further detail. The final chapter looks at attitudes towards communications technology and services and a segmentation model is used to group and compare EMGs and all UK adults.

Section 2

Executive Summary

The ethnic minority group (EMG) population of the UK is made up of many different ethnic groups. This report looks at a sample of the largest ethnic minority groups in the UK – Indians, Pakistanis, Black Caribbeans and Black Africans – as well as EMGs as a whole. The report assesses how these groups are served by the communications industry, and explores the differences between the EMG population and the general population. Under the Communications Act 2003, Ofcom has a specific duty to have regard to the different interests of ethnic minority communities within the UK.

Demographics explain the majority of differences between EMGs and the general population

The EMG population in the UK differs from the general population in demographic profile. Although there are considerable variations between individual groups, the EMG population profile compared to all UK adults tends to:

- be younger;
- be larger in household size;
- be more likely to have children present in the household;
- have higher unemployment rates; and
- have a lower income profile.

Many of the differences in usage of media and communications services between the EMG and the general populations are attributable to these demographic variations. For example:

- People from EMGs are slightly more likely to have mobile phones (83% compared to 80% of all adults). This may reflect the younger age profile of EMGs, as research shows younger people are more likely to have mobile phones than older people.
- Although it differs by individual group, people from EMGs are slightly less likely to have a fixed line (86% compared to 89%). People on lower incomes are less likely to have a fixed line and individuals from EMGs, taken together, have lower average incomes than the general population.
- EMG individuals watch more Children's programming than all individuals, which reflects a younger age profile and more children per household.
- When considering the reasons for having an internet connection at home, a greater proportion of EMGs say it is for their children's education than the overall UK population. This may again reflect the higher number of children in EMG households.

EMGs watch less television overall and less PSB programming in particular

However, there are many variations in usage of communications services that are not accounted for by demographic differences, and are more likely to be explained by cultural differences:

- Of all households that do have multichannel television (including Freeview), EMG households are more likely to take a cable or satellite subscription service.

- While EMGs watch less television on average, a greater proportion of their viewing time is spent watching non-terrestrial channels, compared to the general population. Among all UK individuals, PSB terrestrial channels account for over two-thirds of viewing, while this drops to just under half for EMG individuals.

- Looking at proportions of viewing of specific television channels, EMGs watch much less BBC and ITV1 than the general population.

- Qualitative research that shows that higher take-up of cable/satellite among EMGs is due to demand for increased choice of programmes and channels, and access to specialist channels.

- In all-television households, EMGs spend a greater proportion of their time viewing Films and Children's programming, and less time viewing Drama, Entertainment and Contemporary Music, and Hobbies and Leisure.

- In multichannel households, EMGs watch more Entertainment and Contemporary Music than the general population. However, this is not true in all-television households where the general population watches more Entertainment and Contemporary Music.

Consumption of and attitudes towards communications services

There are a number of other observations that cannot be explained by demographic differences:

- Among mobile phone users, for EMGs the most popular network is T-Mobile, as opposed to O2 for all UK adults.

- EMGs have fewer television sets per household than all UK adults.

EMGs more enthusiastic about communications technology

People from EMGs in the UK appear to be more likely to take up new technologies.

- While household penetration of computers is similar between all UK adults and all EMG adults, among those who have internet access, a higher proportion of EMGs have a broadband service.

- Greater proportions of EMGs have a contract mobile phone (as opposed to pre-pay) than the general population, and EMGs are more likely to receive most of their incoming calls on their mobiles.

- Although the average household income of EMGs is lower, EMGs claim to spend more both on fixed-line and on mobile telecoms services than all UK adults.

Through segmentation analysis of consumer attitudes, there is evidence that EMGs are very enthusiastic users of communications services. The analysis shows that compared to all UK adults, EMGs are more engaged with and more likely to be selective about the technologies they engage in. Therefore it follows that they are also less likely to actively resist adopting new technologies, or abstain from using them due to lack of confidence.

Section 3

Research methodologies

3.1 Data Sources

The majority of the research data in this report is from Ofcom's residential communications tracking survey (2006) and also from bespoke research on attitudes of people from EMGs towards digital technology. BARB data is used to explore viewing habits. Each source is described below.

Ofcom's communications tracking survey

Ofcom's tracking survey assesses consumer behaviour in the UK communications markets over time. Data are collected via a continuous, monthly face-to-face survey of UK residents aged 15+. Data used in this research were aggregated from January to December 2006 to gain a robust base for sub-group analysis of EMGs. The tracker sample is designed to be representative of UK adults, reflecting the profile of sex, age, socio-economic group, region and employment status. It is also representative of cabled/non cabled areas, rural/urban areas and levels of deprivation.

During 2006, 9,118 UK adults were interviewed for Ofcom's tracking survey, including 783 individuals from EMGs. The number of interviews with people from EMGs broadly reflects that sub-group's penetration within the total population in 2001 (7.9%). However, the representativeness of individual ethnic minority groups within the total base size (n=783) is not assured as sub-group quotas were not specified within this. The 2006 data has therefore been re-weighted on age, gender and ethnic group to reflect the 2001 Census profile. Base sizes per individual EMG are small and caution should be exercised in data interpretation.

Figure 1 shows a breakdown of the ethnic minority groups analysed in this report. Not all groups were included, as their population sizes were too small to generate sample sizes large enough for robust analysis.

Figure 1 Sub-group sizes of EMGs from residential tracker 2006

Ethnic group	Number of interviews
Total EMGs	**783**
All Asians	368
- *Indians*	157
- *Pakistanis*	109
Black Caribbeans	99
Black Africans	92

Ethnic omnibus and Consumer Engagement with Digital Communications

In addition to the tracking survey data, Ofcom commissioned the independent specialist research agency, Ethnic Focus, to conduct a survey investigating the attitudes of people from EMGs towards digital technology and communications services. The survey was conducted using an Ethnic omnibus (Ethnibus), which uses interviewers from ethnic minority backgrounds to interview respondents from EMGs.

In September 2006, interviews were carried out with 750 respondents from EMGs. The survey covered attitudes towards digital services and take-up of services across all platforms. The data were compared to research from Ofcom's Consumer Engagement with Digital Communications Report (2006), which examined how UK consumers value and engage with digital communications services.

BARB data on EMG viewing habits

Viewing habits are explored using BARB (Broadcasters' Audience Research Board) data. BARB is the provider of the industry standard measure for television viewing and provides data on the number of people watching television, channels and programmes, and the demographic profiles of viewers. BARB does not report on all channels, and many specialist channels, such as those aimed at EMGs, are not included.

Viewing data are obtained from a panel of television-owning households representing the viewing behaviour of the 24+ million households within the UK. The panels are selected to be representative of each ITV and BBC region. The service covers viewing within private households only. The BARB Establishment Survey is carried out on a continuous basis and involves some 52,000 interviews per year. It is a random probability survey which means that any household within the UK has an equal likelihood of being selected for interview.

EMGs are covered by the Establishment Survey and are interviewed in a proportion that reflects their natural incidence within the UK population. In order to provide a sufficient base for analysis of the EMG population a year's worth of BARB data have been aggregated (October 2005 – September 2006). The sample size of EMGs in this analysis is 536 individuals.

3.2 Reporting conventions

The individual ethnic minority groups, and all groups taken together, were tested against all UK adults, and *significant differences are either circled or highlighted*. Results referred to as 'significantly' different have been tested at the 95% level of confidence and are therefore outside margins of error and can be considered 'real' differences. Generally, data have been analysed only when the sample size was 100 respondents or more. Where base sizes fall below this threshold, data should be treated as indicative.

Section 4

EMG Landscape in the UK

4.1 EMG population in the UK

According to the last Office for National Statistics (ONS) Census in 2001, the majority of the UK population were white (92.1%) and 7.9% belonged to an ethnic minority group (EMG). This equated to around 4.5 million people from EMGs in the UK at that time. More recent data have shown that the EMG population has since increased by 1.3 percentage points, representing 9.2% of the UK population in 2006.[1] The EMG classifications used within this study are consistent with the 2001 Census and are as follows:

Classification of ethnic minority groups

The 2001 Census classified ethnic minority groups at two levels.

Level 1 involved a broad classification which divides the ethnic minority population into five main groups: white; mixed; Asian or Asian British; Black or Black British; Chinese or other ethnic group.

Level 2 allowed more detail within each of the Level 1 classifications:

The 'white' category split into white British, white Irish and other white background. The 'Asian or Asian British' category split into Indian, Pakistani, Bangladeshi, and other Asian background. The 'Black or Black British' category split into Black Caribbean, Black African and other Black background. The 'mixed' category split into white-Black Caribbean, white-Black African, white Asian and other mixed background.

4.2 Geographical spread across the UK

People in the UK from EMGs are more likely to live in England than in any other UK nation. According to the 2001 Census, 96.2% of all people from EMGs in the UK lived in England; only 3.8% lived in Wales, Scotland or Northern Ireland.

The ethnic minority population of the UK is concentrated in large urban centres. Nearly half (45%) lived in the London region in 2001, where they comprised 28.8% of all residents. Seventy-eight percent of Black Africans and 61% of Black Caribbeans lived in London. More than half of the Bangladeshi population (54%) also lived in London in 2001. Other ethnic minority groups were more dispersed with only 19% of Pakistanis residing in London.

[1] The Quarterly Labour Force Survey (July - September, 2006) conducted by the Economic and Social Data Service (ESDS) on behalf of the ONS. This increase may be driven by Eastern European migrants given that the biggest category increase is seen among those categorised as 'other'. Eastern Europeans are not defined as an ethnic group on ONS surveys to date, and therefore cannot be isolated for analysis and investigation. Ofcom ethnic classifications follow those of the ONS, and therefore at present the data available do not investigate these new migrant communities.

4.3 Demographics of the EMG population

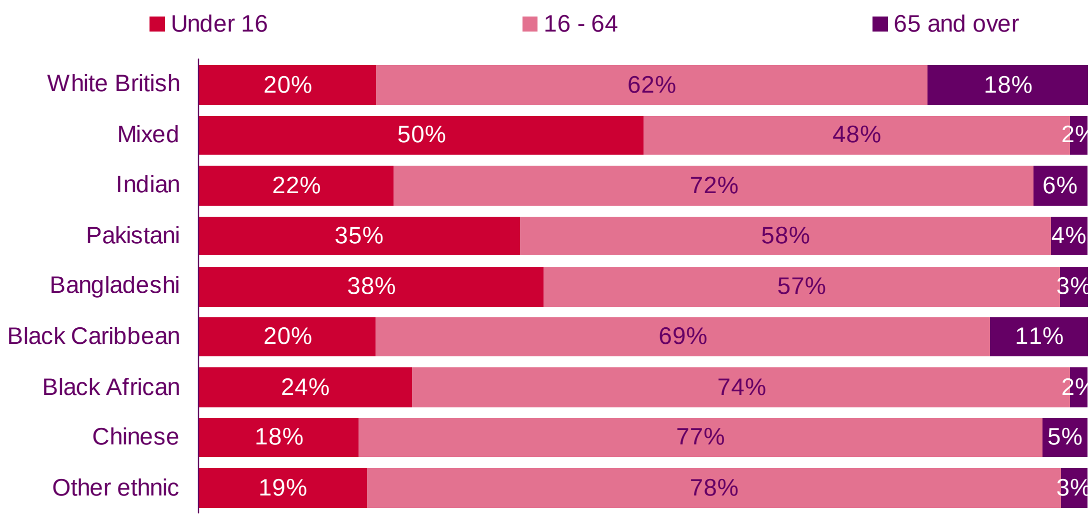
There are demographic differences between ethnic minority communities and the white British population in the UK. EMG populations have a younger age profile, larger household size, are more likely to have dependent children in the house and are also more likely to be unemployed and on lower incomes than the white British population. As detailed below, these observations are relevant to the interpretation of data within the research.

Age profile

Age is a relevant factor in the interpretation of findings, as younger individuals tend to be more enthusiastic towards communications devices, more aware of technology and its benefits and more interested in certain digital features than older individuals, regardless of ethnicity. For some young people this may translate into more informed consumer choices.

The individual EMGs had a younger age structure than the white British population as shown in Figure 2. The mixed group had the youngest age structure with 50% under 16 in 2001; the Pakistani and Bangladeshi group also had larger proportions of their populations aged under 16. The white British group had the oldest age profile with 18% of UK residents 65 and over. Among the individual EMGs, Black Caribbeans had the largest proportion of people aged 65 and over (11%).

Figure 2 Age distribution by ethnic group



Source: 2001 Census
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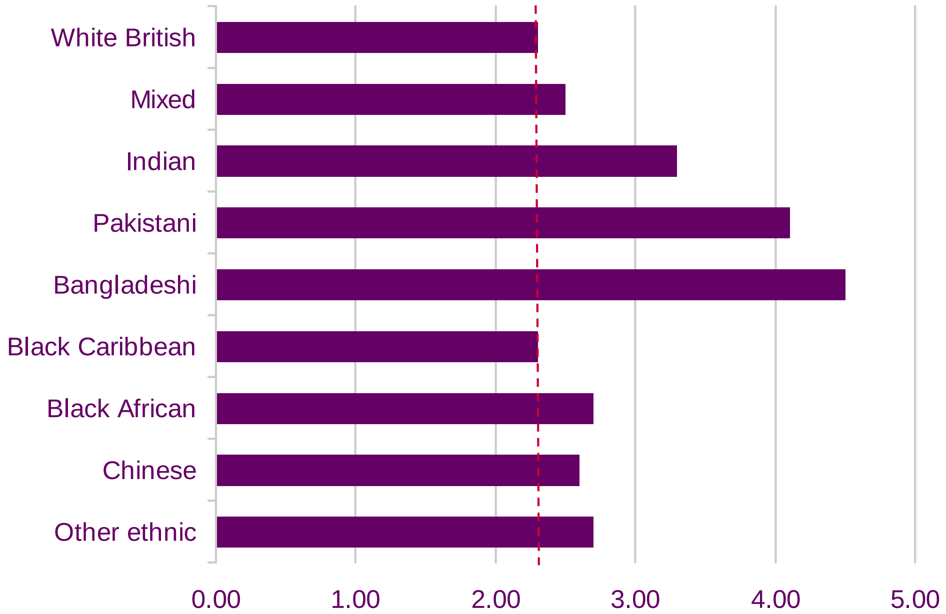
Household size

Household size also has relevance throughout this report as larger households may foster a more communal use of communications services. Higher numbers of people in the household may also result in more competition for use of communications products and services. For example, if internet access is restricted to one user at a time this may increase the total household's hours spent online.

EMG households are generally larger in size than white British households, according to the 2001 Census (Figure 3), however, there was much variation between groups. Bangladeshi households were the largest of all with an average size of 4.5 people, followed by Pakistani households (4.1 people) and Indian households (3.3 people). Black Caribbean and white British households had the smallest household size, both with an average of 2.3 people.

Figure 3 Household size by ethnic group



Source: 2001 Census
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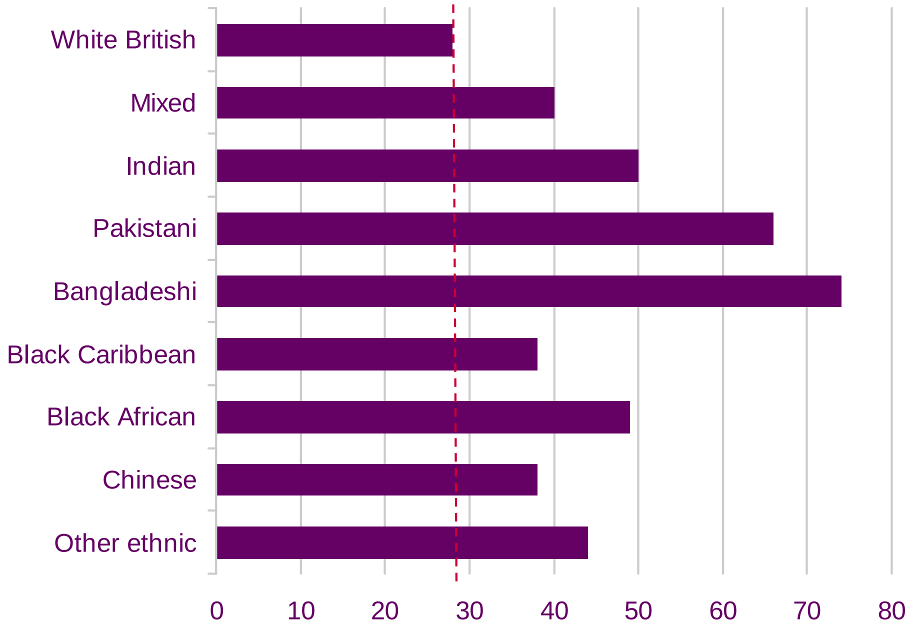
Households with children

The presence of children within households can have an effect on communications consumption. It is a known driver of take up of multichannel services and television viewing choices are likely to be affected. It is also likely to influence both the number and type of communications devices within the household, as well as the locations of these devices.

People from EMGs are significantly more likely than the white British population to have children in the household according to data in the 2001 Census. Three-quarters (74%) of Bangladeshi households contained at least one dependent child. Pakistani and Indian households were also more likely than average to contain at least one dependent child (66% and 50% respectively). Around half of Black Africans had a dependent child in the household. In comparison, only 28% of white British households had a child present, as shown in Figure 4.

Figure 4 Proportion of households with children by ethnic group



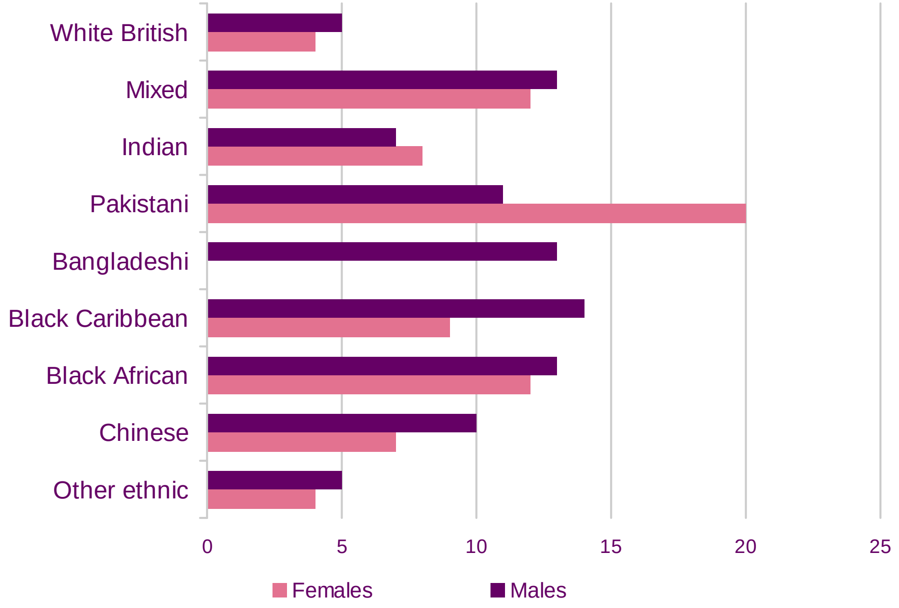
Source: 2001 Census

Employment and income

Higher levels of unemployment and lower average income are likely to result in lower levels of disposable income. This can impact on take-up and usage of communications services.

Unemployment rates are generally higher among EMGs than their white British counterparts, although there is substantial variation between each EMG as shown in Figure 5. Additionally, people from EMGs were more likely than white British people to live in low-income households in 2000/01[2], although again, there was considerable variation among the different groups (Figure 6).

Figure 5 Unemployment by ethnic group and gender



Source: 2001 Census. Data not available for Bangladeshi females.
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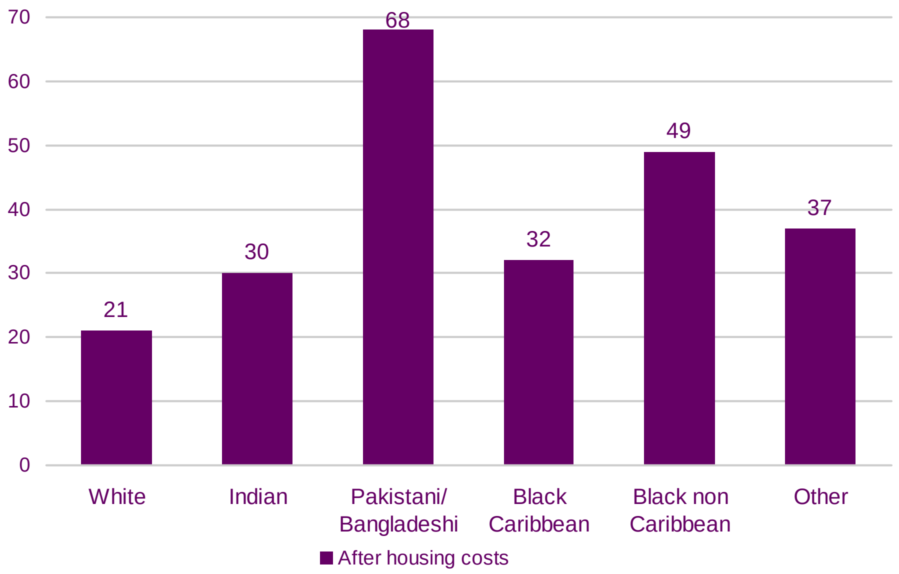
Figure 6 Households on low income by ethnic group



Source: Family Resources Survey 2000/1, Department for Work and Pensions

[2] Households Below Average Income, Family Resources Survey, 2000/1, DWP

Section 5

Consumption of services: television

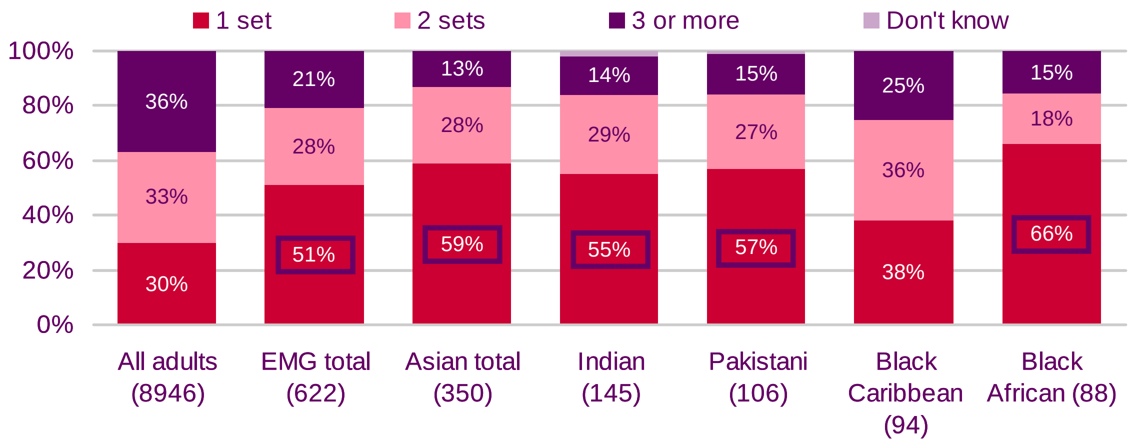
5.1 Usage of television services

Penetration of digital television services was similar between EMGs and the total population, but there were key differences across platforms. Although people from EMGs had a lower penetration of digital multichannel television than all adults (68% compared to 74%), a higher proportion used cable/satellite services (60% compared to 52% respectively).

Number of televisions in household

Overall, people from EMGs have fewer TV sets per household than all UK adults – where three in ten people from the general population say they have only one set, five in ten people from EMGs only have one set. There are variations by ethnic group, with Black Caribbeans being the closest to the general population (Figure 7).

Figure 7 Number of television sets in household



Q: How many TV sets are there in your home?
Base: All with a TV in the household (base sizes in brackets); significant difference shown for one set only
Source: Ofcom communications tracking survey, 2006

Television service access

Figure 8 shows that penetration of digital multichannel television was lower in 2006 among adults from EMGs than the total population (68% compared to 74% respectively). However, EMGs were more likely to have cable/satellite television services than the average UK population (60% compared to 52%). Asians, specifically Pakistanis, and Black Caribbeans were most likely to have cable/satellite.

People from EMGs were significantly less likely to have Freeview than the general population (12% versus 29% respectively).

Figure 8 Television service access 2006

	All (9096)	EMG total (778)	Asian total (368)	Indian (156)	Pakistani (109)	Black Caribbean (98)	Black African (91)
Terrestrial only	23%	25%	26%	28%	21%	19%	25%
Any digital multichannel	74%	68%	68%	65%	76%	78%	69%
Freeview[1]	29%	12%	8%	8%	6%	11%	18%
Cable/Satellite[2]	52%	60%	62%	59%	72%	69%	54%
Pay TV[3]	46%	49%	46%	52%	51%	61%	42%

Q: Which, if any, of these types of TV does your household receive at the moment?
Base: All with television at home (Base sizes in brackets)
Source: Ofcom communications tracking survey, 2006
1 With or without Top-UP TV
2 Includes digital cable, paid and free satellite, and DSL TV
3 Includes digital cable, paid satellite, DSL TV in-house and Freeview with Top-up TV

In 2004, Ofcom commissioned Ethnic Dimension to conduct qualitative research into ethnic minorities and communications services. It found that the core reasons for adopting multichannel television among people from EMGs was to increase their choice of programmes and channels, to access specialist channels/programmes including those targeted at ethnic minority groups and to benefit from time-shifted viewing using PVRs.

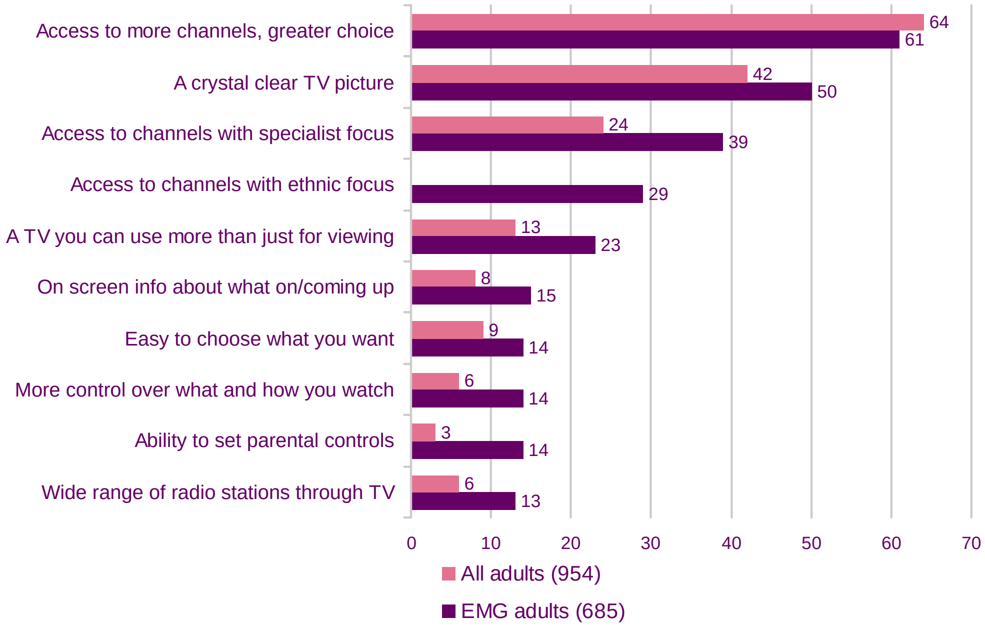
The research found that Asians, Chinese and Middle Eastern groups, in particular, had particular needs to view programming that featured culture, heritage, news and language associated with their ethnic background. The Black Caribbean participants and, to a lesser extent, the Black African participants (who viewed some specialist ethnic minority channels), had fewer specific cultural/language interests and requirements and felt better served by mainstream programmes.

Awareness and understanding of the term ‘digital television’

In terms of awareness of ‘digital television’, 94% of all UK adults and 91% of EMG adults claimed to have heard of the term. When asked about the benefits of digital television, all UK and EMG adults cited access to more channels/greater choice, a crystal-clear television picture and access to channels with a specialist focus as the top three benefits (Figure 9).

Responses to the question on specific access to channels with an ethnic focus (which was only asked in the EMG Ethnibus survey) confirm that the desire to access culturally specific/foreign service channels is a driver of take-up and usage of multichannel television among ethnic minority groups.

Figure 9 Understanding of the benefits of digital television

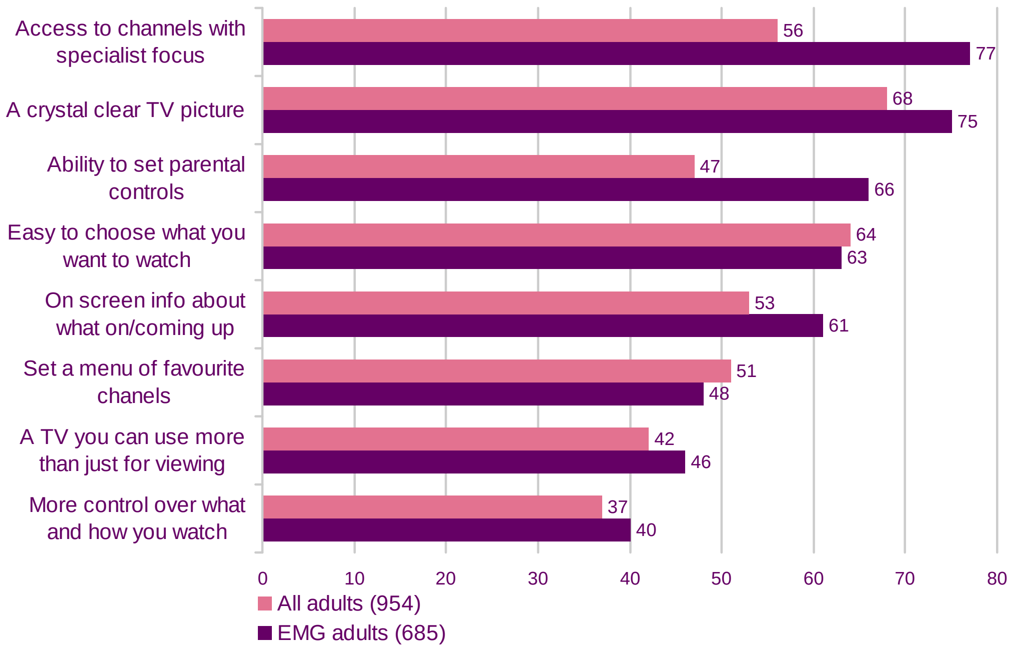


Q: As far as you know, what does digital TV offer over terrestrial TV?
Base: All respondents (Base sizes in brackets)
Source: Ofcom digital consumer survey, 2005 and Ethnibus survey, 2006

Perceived value of features of digital television

There is some difference in the ranking order of value of features of digital television between all UK adults and EMGs as shown in Figure 10. People from EMGs are more likely to value access to specialist channels, and the ability to set parental controls.

Figure 10 Perceived value of digital television benefits



Q: How valuable are each of the following things to you?
Base: All respondents (Base sizes in brackets)
Source: Ofcom digital consumer survey, 2005 and Ethnibus survey, 2006

5.2 Viewing of broadcasting services

This section looks at trends in television viewing, including the amount of television viewed and the types of programmes watched, comparing EMG individuals (as opposed to households) with all individuals throughout. All data in this section are sourced from BARB.

It should be noted that the EMG population within the BARB database is not necessarily representative of the different EMG groups, as no individual group quotas are set within the 7.9% representation of the total population. Therefore the data from this section should be used with caution for direction only.

Average hours of viewing per day

Over the analysis period (October 05-Sept 06), the average individual in the UK watched 3hrs 37mins of television each day. This figure falls to 3hrs 16mins among EMG individuals - meaning people from EMGs watch on average 21mins less television per day.

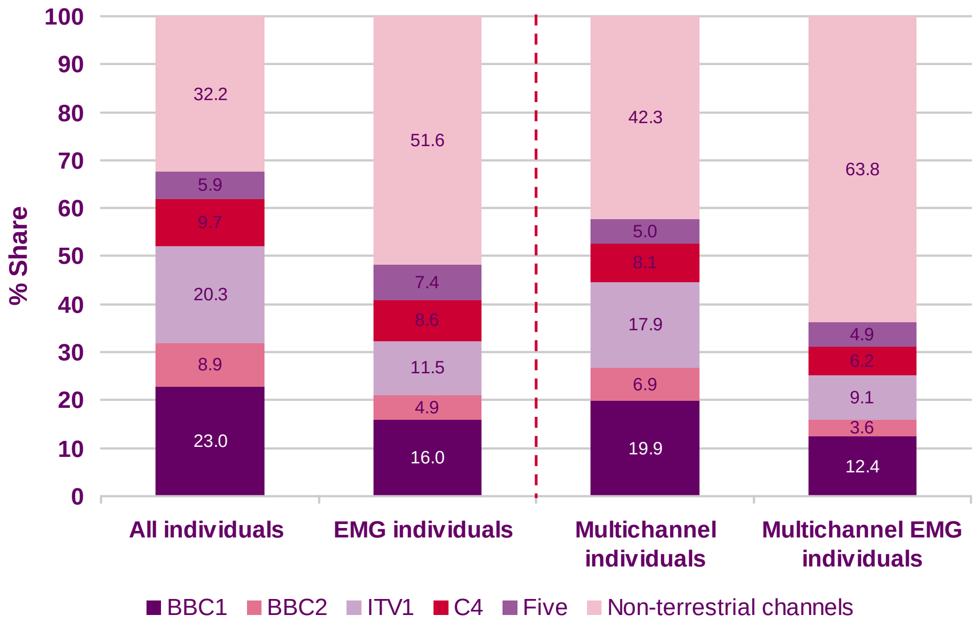
Within EMG households, viewing of the terrestrial channels accounts for 1hr 35mins per day of total television viewing; approximately half of total daily viewing. This compares to 2hrs 27mins among all individuals, which is approximately two-thirds of total daily viewing. Therefore, even though total television viewing is lower among EMGs, a greater proportion of viewing time is spent in the non-terrestrial environment.

Channel viewing share

Figure 11 shows that non-terrestrial channels account for just over half of all viewing by EMG individuals (51.6%) compared with just under a third of viewing by all individuals (32.2%). Similarly, almost two-thirds (63.8%) of viewing by EMGs in multichannel households is of non-terrestrial channels, compared to 42.3% of viewing among all individuals.

It also shows that people from EMGs spend less time proportionally watching BBC One, BBC Two and ITV1, and more time watching Five.

Figure 11 Channel viewing share



Source: BARB, Oct 2005 – Sept 2006

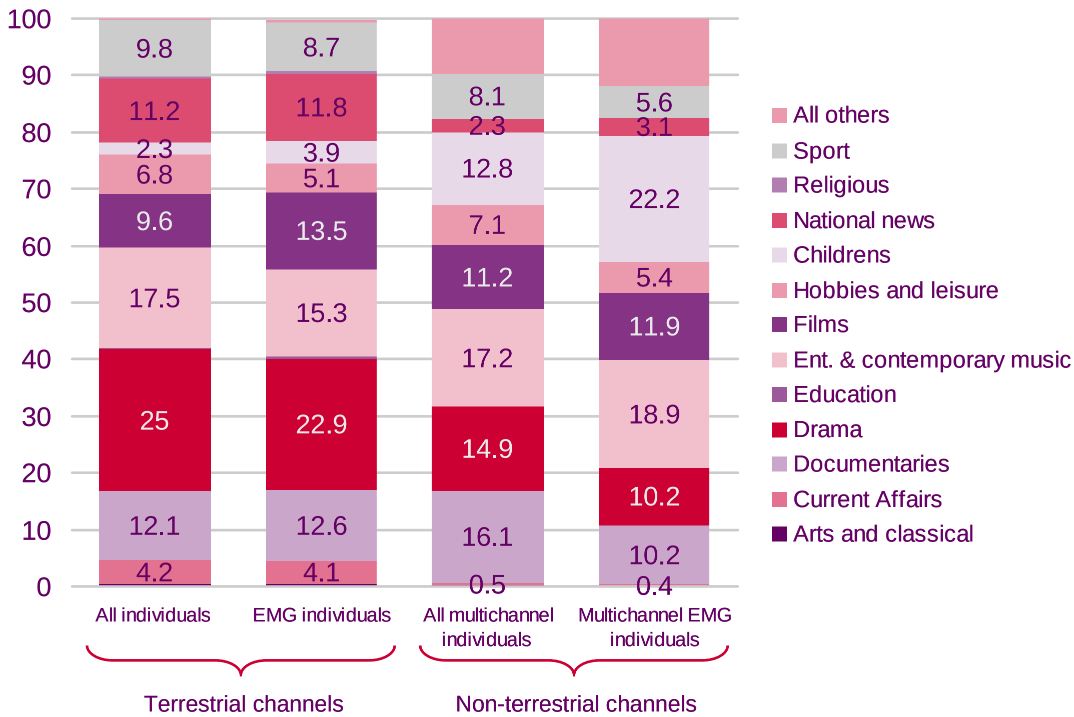
Genre viewing

Figure 12 shows that individuals from EMG households attribute a greater proportion of their total viewing than average, across terrestrial channels, to the genres of Film (13.5% compared to 9.6%) and Children's programming (3.9% compared to 2.3%). Conversely, individuals from EMG households watch proportionally less Drama (22.9% compared to 25%), Entertainment (15.3% compared to 17.5%) and Hobbies and Leisure (5.1% compared to 6.8%).

Based on viewing of non-terrestrial channels, multichannel EMG individuals spend a greater proportion of their total watching Entertainment genres (18.9% of their total viewing of non-terrestrial channels compared to 17.2% of all multichannel individuals). This is an interesting point of comparison to the terrestrial environment where we see that EMGs watch less Entertainment. This may imply a gap across this genre on terrestrial channels which is being filled by non-terrestrial channels.

Another genre which accounts for a large proportion of viewing by EMGs in the multichannel environment is Children's programming. More than a fifth (22.2%) of viewing of non-terrestrial channels is to the Children's genre, compared with 12.8% among all multichannel individuals. This is possibly driven by the higher proportion of households with dependent children among EMGs.

Figure 12 Types of genre viewed – terrestrial and non-terrestrial channels



Source: BARB, Oct 2005 – Sept 2006

These observations reflect the findings of a survey conducted for the British Film Institute (funded by the Economic and Social Research Council) by the Centre for Research on Socio-cultural Change at the Open University and the University of Manchester[3]. Among this study's key findings it was reported that, in general, members of EMGs have a strong involvement in film culture. They go more regularly to the cinema than the rest of the

[3] The summary findings of this study were sourced from the Media Guardian, November 2006

population and are more likely to own collections of film and video, as well as to watch film clips on the internet and access news and sports.

A snapshot month

Looking at a sample month (September 2006) of top 20 terrestrial programmes watched, split by all individuals and EMG individuals, distinct viewing differences are seen (Figure 13).

Soaps are the most common genre to feature in the top five most watched programmes for both groups. However, while among all individuals, Coronation Street is ranked first, Eastenders second, and Emmerdale fourth, for EMG individuals Eastenders is ranked first and Coronation Street fourth. Given that the EMG population is concentrated in London and urban areas, this may be reflective of the geographical spread and the urban/rural foci of these soaps.

While UK Drama series feature heavily in the top programmes for all individuals, this is not the case for EMG individuals. Based on the top 20 programmes listed there appears to be greater interest in Current Affairs programming among EMGs than all individuals.

Figure 13 Top 20 programmes: All individuals and EMG individuals – Sept 2006

All individuals					EMG individuals					
Title	Genre	Chan-nel	Date	Avg Audience 000s	Title	Genre	Chan-nel	Date	Avg Audience 000s	Index
Coronation Street	Drama: Soaps UK	ITV1	25/9	10866	Eastenders	Drama: Soaps UK	BBC1	25/9	635	85
Eastenders	Drama: Soaps UK	BBC1	25/9	9841	The X Factor	Entertainment: Family Shows	ITV1	23/9	408	58
The X Factor	Entertainment: Family Shows	ITV1	23/9	9168	Panorama: Football's Dirty Secrets	Current Affairs: Pol/Econ/Soc	BBC1	19/9	344	88
Emmerdale	Drama: Soaps UK	ITV1	21/9	8549	Coronation Street	Drama: Soaps UK	ITV1	25/9	337	41
Ant & Dec's Saturday Night Takeaway	Entertainment: Family Shows	ITV1	30/9	8180	Celebrity Masterchef	Hobbies/ Leisure: Cookery	BBC1	29/9	329	76
How Do You Solve A Problem Like Maria?	Entertainment: Family Shows	BBC1	16/9	8156	Holby City	Drama: Series UK	BBC1	05/9	312	58
Match Of The Day Live	Sport: Football	BBC1	02/9	7586	I Smack And I'm Proud	Documentaries: Human Interest	ITV1	21/9	311	105
Midsomer Murders	Drama: Series UK	ITV1	24/9	7273	Crimewatch UK	Current Affairs: Consumer	BBC1	12/9	308	88
The Royal	Drama: Series UK	ITV1	17/9	7249	Rogue Traders	Current Affairs: Consumer	BBC1	11/9	304	87
Holby City	Drama: Series UK	BBC1	05/9	7122	Spooks	Drama: Series UK	BBC1	17/9	301	63
Dalziel And Pascoe	Drama: Series UK	BBC1	11/9	7104	The Bill	Drama: Soaps UK	ITV1	20/9	298	64
The National Lottery - In It To Win It	Entertainment: Lottery Show/Updates	BBC1	02/9	6775	Match Of The Day Live	Sport: Football	BBC1	02/9	291	50
Casualty	Drama: Series UK	BBC1	24/9	6658	What Not To Wear	Hobbies/ Leisure: General	BBC1	28/9	279	87
Where The Heart Is	Drama: Series UK	ITV1	10/9	6646	Ten O'clock News	News: National	BBC1	07/9	278	62
Wire In The Blood	Drama: Series UK	ITV1	20/9	6483	Outtake TV	Entertainment: Family Shows	BBC1	08/9	260	70
Who Do You Think You Are?	Hobbies/ Leisure: Miscellaneous	BBC1	06/9	6401	Home And Away	Drama: Soaps Non-UK	Five	14/9	258	178
9/11: The Twin Towers	Documentaries: Factual Drama	BBC1	07/9	6386	Shallow Hal	Films: Cinema US	Five	10/9	256	120
Jane Eyre	Drama: Serials UK	BBC1	24/9	6329	9/11: The Twin Towers	Documentaries: Factual Drama	BBC1	07/9	249	51
Who Wants To Be A Millionaire?	Entertainment: Quiz Shows/Panel Games	ITV1	23/9	6327	Casualty	Drama: Series UK	BBC1	24/9	247	49
Life Begins	Drama: Series UK	ITV1	18/9	6315	Who Do You Think You Are?	Hobbies/Leisure: Miscellaneous	BBC1	06/9	245	50

Source: BARB, Sept 06, terrestrial channels only
Highest occurrence only (duration 5+ mins)

Section 6

Consumption of services: telecoms

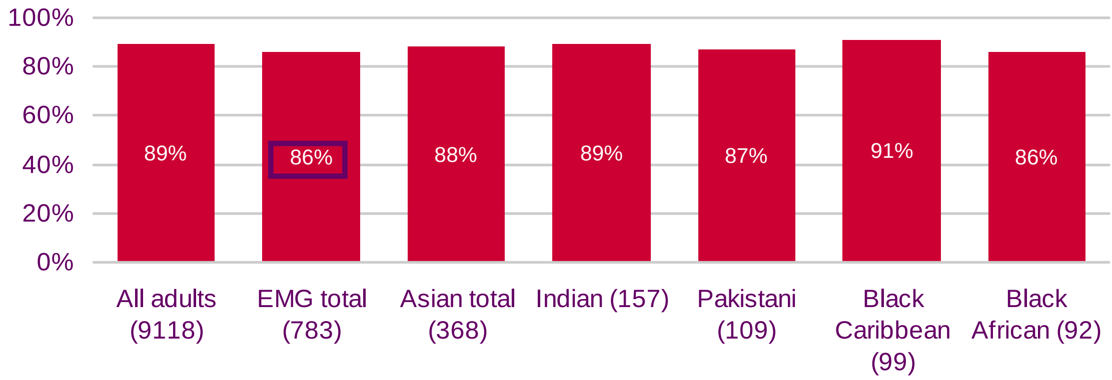
6.1 Fixed-line telecoms

This section compares ethnic minority groups' experiences of the residential fixed-line marketplace to that of all UK adults. Where possible (base sizes allowing) measures are examined by specific EMG group. Take-up, suppliers and claimed spend are explored.

Fixed-line take-up

In 2006, the majority of people from all EMGs had a fixed line, yet overall a slightly smaller proportion had fixed lines than the total adult population (86% compared to 89% respectively), as shown in Figure 14. However, when looking at individual ethnic groups there were no significant differences.

Figure 14 Fixed-line take-up 2006



Q: Is there a landline in your home that can be used to make and receive calls?
Base: All respondents (Base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Fixed-line suppliers

Figure 15 shows that BT was the dominant supplier among all groups. However, while 62% of all respondents said that their main supplier was BT, this was slightly higher among those from an EMG, at 67%. In particular, Black African people were more likely than any other group to say their main landline supplier was BT.

Figure 15 Main fixed-line supplier 2006

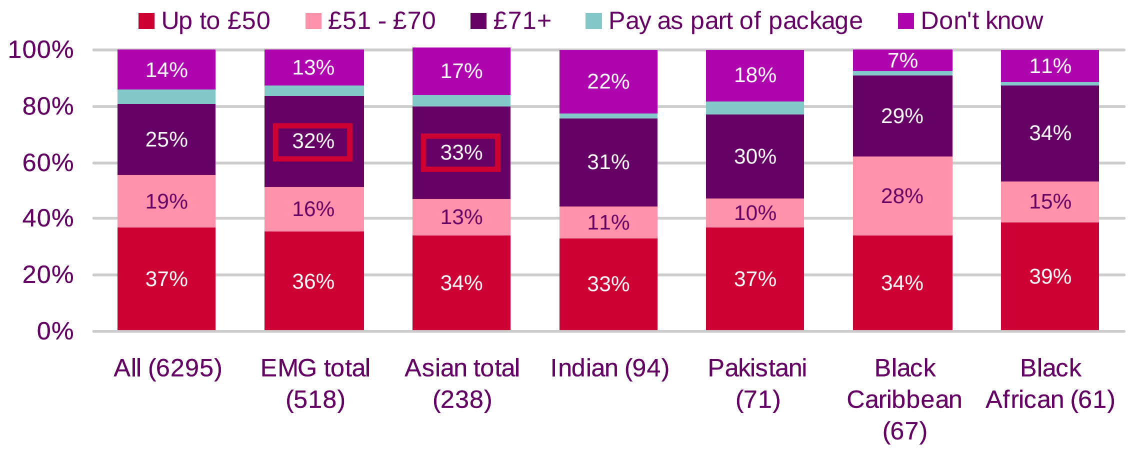
	All (8254)	EMG total (680)	Asian total (328)	Indian (140)	Pakistani (98)	Black Caribbean (91)	Black African (80)
BT	62%	**67%**	67%	67%	66%	69%	**74%**
NTL	12%	12%	12%	14%	10%	12%	12%
Telewest	7%	10%	10%	6%	**14%**	8%	5%
Other	15%	10%	9%	9%	8%	9%	5%
Don't know	3%	2%	2%	3%	0%	2%	4%

Q: Which of these companies does your household use for their home landline service?
Base: Anyone with a landline (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Fixed-line claimed spend

Just over a third of all respondents estimated that they spent up to £50 per quarter on their landline as shown in Figure 16. However, people from EMGs were more likely to estimate that they spent more than £71 per quarter than all adults (32% compared to 25%).

Figure 16 Estimated quarterly spend on fixed-line 2006



Q: Approximately how much would you estimate the total quarterly bill is for your home landline phone service?
Base: All with a landline phone (base sizes in brackets). Base sizes less than 100 are indicative.
Source: Ofcom communications tracking survey, 2006

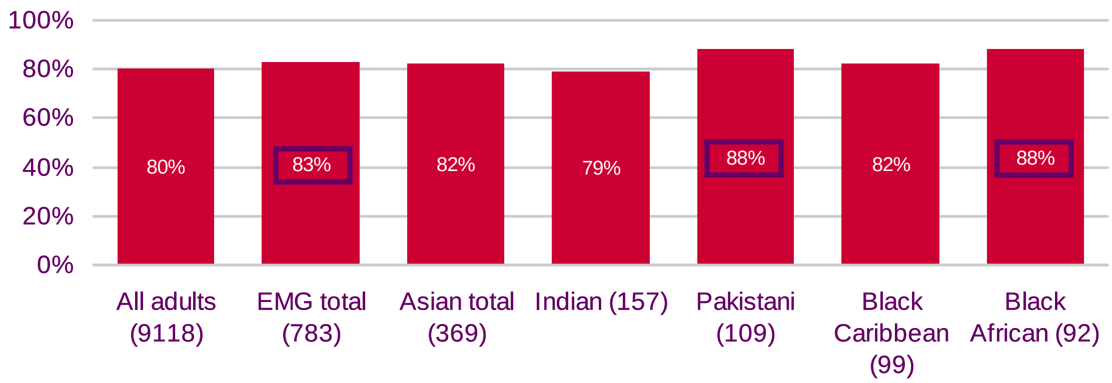
6.2 Mobile telephony

This section examines take-up, usage, claimed spend and contract type of mobile phones, comparing the ethnic minority group sample with all UK adults. It also considers attitudes of non-mobile users towards mobile phones.

Mobile phone take-up

Mobile phone take-up was slightly higher among the EMG population than the general adult population (83% and 80% respectively). It was somewhat higher among Black African and Pakistani respondents, at 88% each, as shown in Figure 17.

Figure 17 Mobile phone take-up 2006

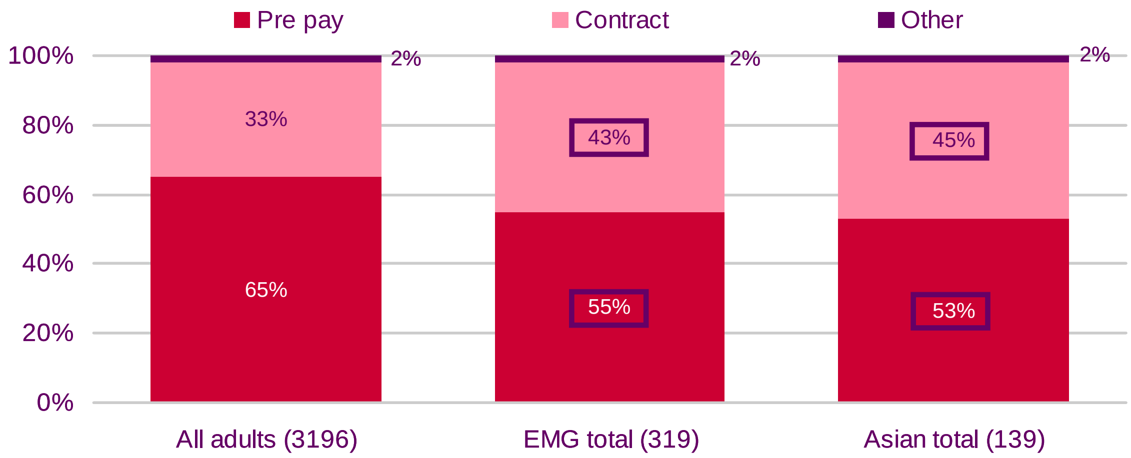


Q: Do you personally use a mobile?
Base: All respondents (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Claimed mobile phone payment packages

Although pre-pay mobile packages were more common than monthly contracts among all respondents (65% and 33% respectively), EMGs were more likely to subscribe to monthly contracts than the total adult population (43% compared to 33% respectively) as shown in Figure 18.

Figure 18 Type of mobile phone package 2006



Q: Which of these best explains the type of package you use most often?
Base: All those with a mobile phone (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Mobile phone suppliers

Figure 19 shows that more adults in the total population claimed to use the O2 network than any other mobile network operator (26%). However, EMGs taken together showed a preference for the T-Mobile network (28%).

Figure 19 Main mobile network operator 2006

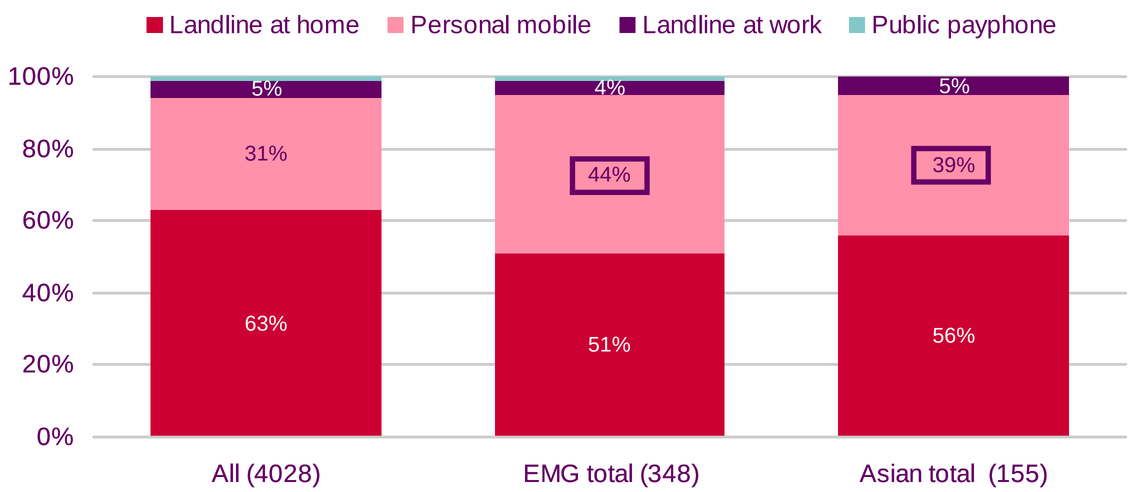
	All (3196)	EMG total (319)	Asian total (139)
O2	26%	**19%**	25%
Orange	23%	21%	20%
Vodafone	20%	**15%**	15%
T-Mobile	14%	**28%**	**25%**
Virgin	6%	6%	4%
3	4%	**7%**	9%

Q: Which mobile phone network do you use most often?
Base: All those with a mobile phone (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Main method of receiving calls

A larger proportion of people from EMGs than all UK adults claim that their mobile phone is their main way of receiving incoming calls (44% compared to 31%). Figure 20 shows that all UK adults claim to proportionally use their fixed line more than people from EMGs to receive calls (63% compared to 51%).

Figure 20 Main method of receiving calls 2006

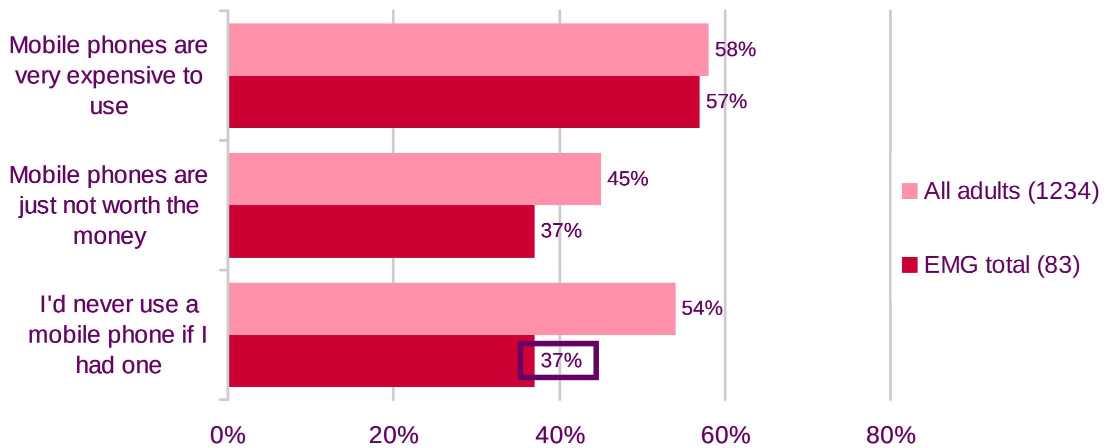


Q: Which of these do you consider to be your main way of receiving phone calls?
Base: Anyone with a landline and/or mobile (base sizes in brackets).
Source: Ofcom communications tracking survey, 2006

Attitudes towards mobile phones among non-owners

Attitudes towards mobile phones by non-owners differ between all UK adults and EMG adults as shown in Figure 21. While over half of all non-mobile owners did not own a mobile because they simply wouldn't use one, just over a third of people from an EMG gave this as a reason (37% of EMGs, compared to 54% agreed with the statement 'I'd never use a mobile phone if I had one'). Cost was the predominant reason all respondents gave for not having a mobile phone (58% for all adults and 57% for EMGs).

Figure 21 Attitudes to mobile phones among non-owners



Q: How much do you agree or disagree with the following statements? (% slightly/strongly agree)
Base: Non-owners of mobile phones (sizes as show in brackets).
Source: Ofcom communications tracking survey, 2006

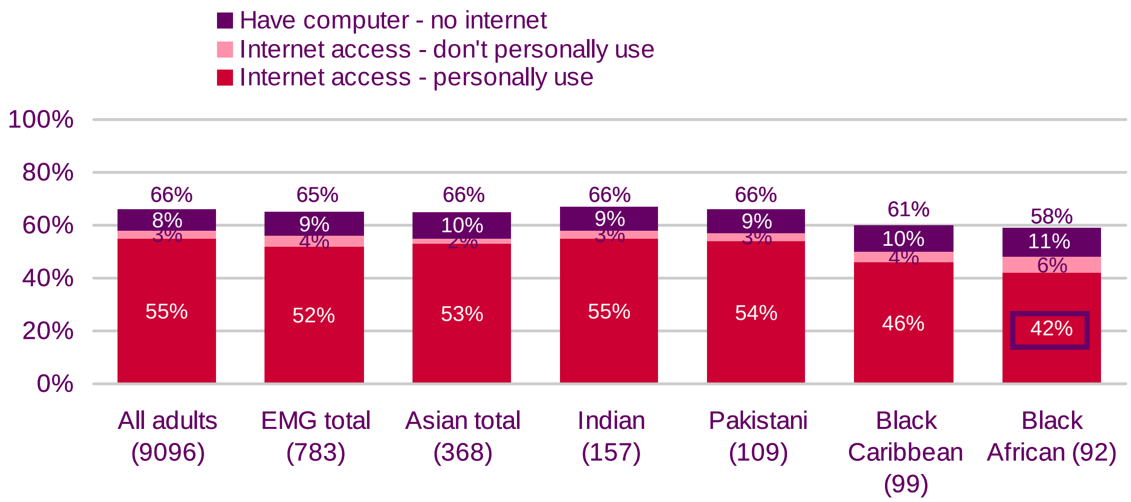
Section 7

Consumption of services: internet

Take-up of internet services

Figure 22 shows that computer take-up levels are similar between all adults and EMGs, with around two-thirds of each having a computer at home (66% and 65% respectively). Black Caribbean and Black African respondents had slightly lower levels of computer ownership (61% and 58% respectively). Internet household penetration was also similar between groups at around 55%. Among the EMG populations, Black Africans were the least likely to have internet access at home, at 42%.

Figure 22 Computer ownership and internet take-up 2006

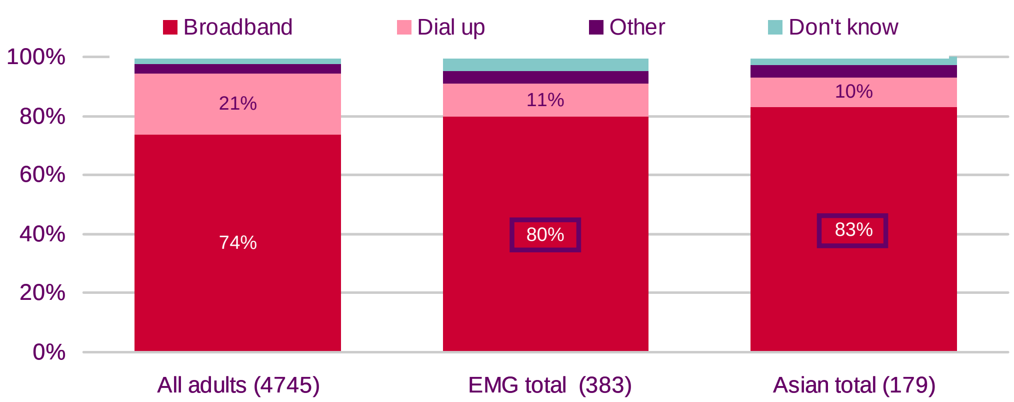


Q: Does your household have a PC or laptop computer?
Base: All adults (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Type of internet connection

In 2006, of all people who had an internet connection at home, those from an EMG were more likely than all UK adults to have broadband (80% compared to 74%), as shown in Figure 23.

Figure 23 Main method of internet connection at home 2006

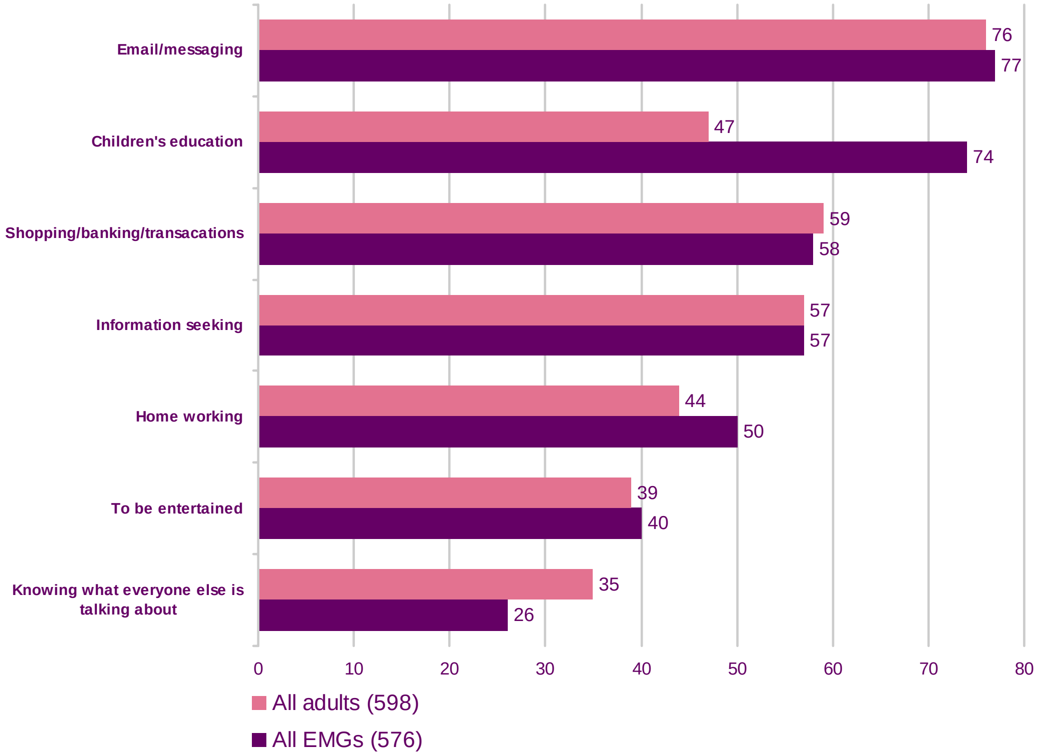


Q: And which of these is your main method of connection to the internet at home?
Base: All those with an internet connection at home (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Motivations for having an internet connection at home

Although the most popular motivations for having an internet connection at home are similar among people from EMGs and all UK adults, those from EMGs are much more likely to see ‘children’s education’ as a reason for having internet access (74% compared to 47% respectively). This is likely to be driven by the greater presence of children in EMG households. Other commonly cited reasons from both groups were for emailing/messaging, shopping/transactions and information-seeking as shown in Figure 24.

Figure 24 Reasons for having an internet connection at home

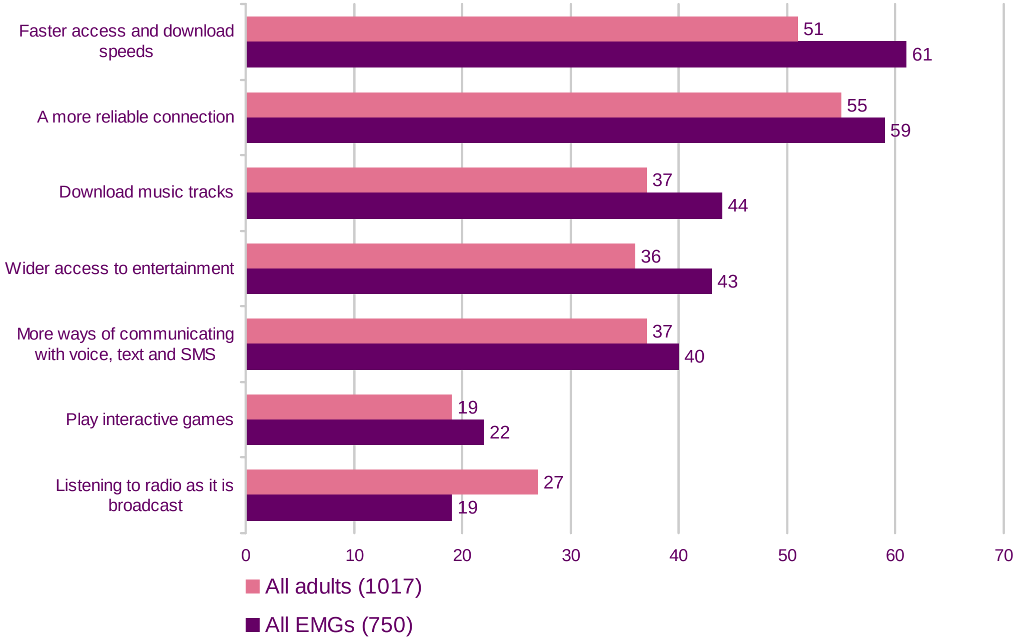


Q: Please tell me how important each is to you as a possible reason for having the internet at home, using a scale from 1 to 5 – where 1 is ‘Not at all important’ and 5 is ‘Extremely important’. (% saying 4/5 reported above)
Base: All with internet at home or likely to get it (base sizes in brackets)
Source: Ofcom digital consumer survey, 2005 and Ethnibus survey, 2006

Perceived value of broadband benefits and features

Both all UK adults and EMGs value speed of access along with reliability of connection as the most important features of broadband (see Figure 25 below). The ranking order of features was very similar.

Figure 25 Perceived value of broadband benefits

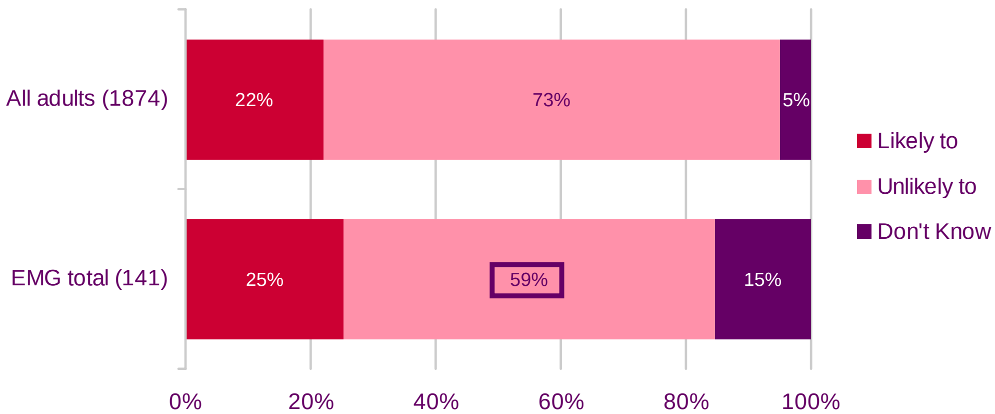


Q: Please use a scale from 1 to 5 to tell me how valuable each is to you – where 1 is 'Not at all valuable' and 5 is 'Extremely valuable'. (% saying 4/5 reported above)
Base: All respondents (sizes in brackets)
Source: Ofcom digital consumer survey, 2005 and Ethnibus survey, 2006

Households with no internet connection

While 42% of all UK adults do not have internet access at home, EMGs appeared less resistant towards adopting the internet, as shown in Figure 26. In response to the question "How likely are you to get internet access at home in the next twelve months?" a smaller proportion of EMGs claimed to be unlikely to do so than the total population (59% compared to 73% respectively).

Figure 26 How likely to get internet access 2006



Q: How likely are you to get internet access at home in the next twelve months?
Base: All without internet access at home (base sizes in brackets)
Source: Ofcom communications tracking survey, 2006

Section 8

Attitudes to communications services

8.1 Introduction

This section looks at attitudes towards communication services in order to understand the differences between EMGs and all UK adults that have been identified in the preceding chapters. A segmentation model developed for Ofcom's 2006 publication Consumer Engagement with Digital Communications Services is used. The chapter begins by looking at the statements behind the segmentation model from Ofcom's residential tracker. It then compares the results of running the segmentation model on all UK adults and EMGs from the Ethnibus survey.

8.2 General consumer attitudes to communications services

The Ofcom residential tracker asks respondents to agree or disagree with a number of statements regarding communications technology. An overview of the results indicates that the EMG population is much more interested in technology across the board, Figure 27 below demonstrates this:

Figure 27 Attitudes to technology: UK adults and EMG adults

	All (6679)	EMG total (621)
Technology is important to me	69%	**83%**
I try to keep up with technology	59%	**72%**
I am more knowledgeable than most people about landlines	16%	**27%**
I could quite happily live without a mobile phone	50%	**37%**
I am more knowledgeable than most people about mobiles	18%	**33%**

Source: Ofcom communications tracking survey, 2005
Figures in purple indicate 'significantly' higher/lower than the figures quoted in the corresponding row.

When isolating young adults aged 15–24, differences in attitudes towards technology are diminished (see Figure 28 below). The table indicates that the only significant difference in attitudes towards communications technology lies in the level of claimed knowledge regarding mobile phones.

Figure 28 Attitudes to technology: among 15-24 year olds

	All (1169)	EMG total (154)
Technology is important to me	86%	90%
I try to keep up with technology	78%	83%
I am more knowledgeable than most people about landlines	19%	24%
I could quite happily live without a mobile phone	20%	25%
I am more knowledgeable than most people about mobiles	42%	**58%**

Source: Ofcom communications tracking survey, 2005
Figures in purple indicate 'significantly' higher/lower than the figures quoted in the corresponding row.

8.3 Consumer Engagement with Digital Communications Services

Ofcom's report *Consumer Engagement with Digital Communications Services* built on research relating to availability, take-up and consumption exploring the 'how' and 'why' that underpins these data. The report focused on consumer attitudes and motivations towards digital communications services, and, in particular, the value people place on these services.

The core findings of the research were that there are wide-ranging differences in how and why UK consumers engage with digital communications services. Differences in engagement cannot be explained by an individual's age, gender or income alone and broader attitudes towards technology and digital services are also influential factors. An attitudinal segmentation model was developed to provide a richer and more in-depth understanding of the different ways UK consumers engage with communications services.

One of the key conclusions was that the majority (68%) of UK consumers have the same broad attitude towards each of the four main digital communications platforms: television, radio, the internet and mobile phones (cross-platform attitudes). A minority (32%) of consumers think about and see value in one platform differently from the others (platform-specific attitudes).

The cross-platform segments

Among the 68% of UK consumers with attitudes which are consistent across communications platforms, the segmentation model identified five consumer segments – each one painting a picture of the way certain UK consumers value digital services.

- **The Enthusiasts** are keen and adventurous digital users for whom technology plays a broad and important role in delivering practical benefits and social or leisure opportunities. Even these individuals, though, are not always taking advantage of some of the functionality they might value – as a hectic work and personal life often takes priority over further digital exploration. This group needs a fast track through to new benefits and features – potentially via convergent devices.

- **The Functionalists** are very confident with and feel knowledgeable about technology, but engage with digital services in a cautious and considered manner. While open to new developments, they are only prepared to broaden their horizons if there is a very clear benefit to them. This group needs 'fit for purpose' products and services without bolt-on 'bells and whistles'.

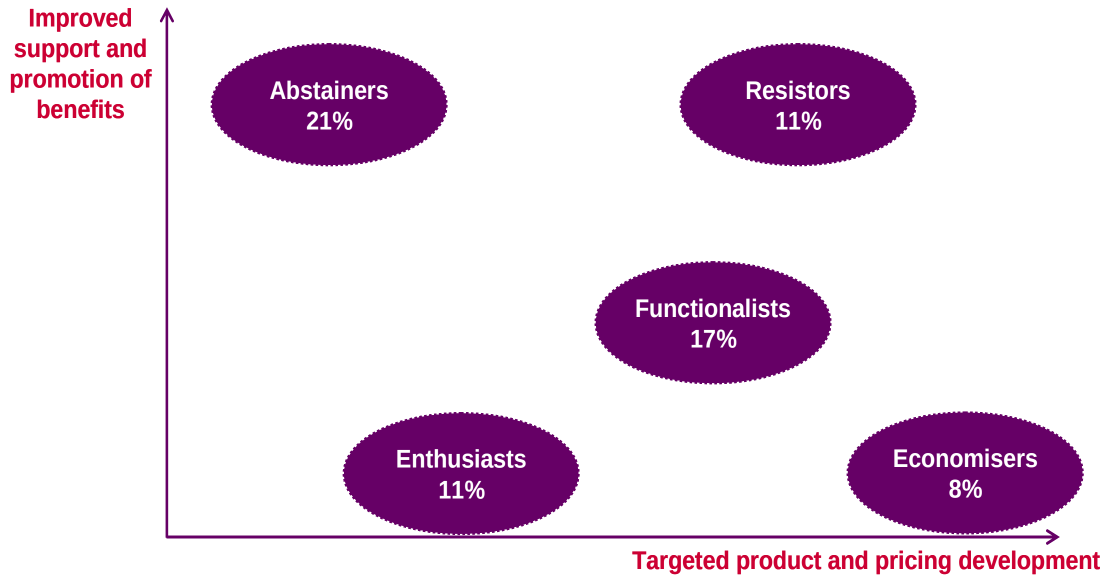
- **The Economisers** see clear value in the full range of benefits that digital services can offer and take advantage of the platforms at their disposal – but costs may be limiting further take-up and use, particularly of the internet. This group needs an affordable entry point and products and services with reasonable ongoing costs.

- **The Abstainers** often have access to digital services at home but use them little, primarily due to lack of confidence, knowledge or interest. In the absence of support and guidance, many have taken the easier option of turning their back on digital services as they are uncomfortable with trying something new in case it goes wrong. This group needs considerable back-up to get them started and to help them gain confidence and experience in the use of digital communications services.

- **The Resistors** are detached from digital services, believing them to be of little relevance to their lives - and actively resisting technology adoption. However, this initial rejection frequently masks a sense of being daunted by technology and a desire for digital products and services that are easier and simpler. These people also need to be clearly shown how digital services could benefit them.

Figure 29 below indicates the size of each of the segments. Abstainers, Economisers and Resistors (the lowest engagement segments) make up 40% of the population. Enthusiasts and Functionalists (the most engaged segments) make up just over one quarter (28%).

Figure 29 The five cross-platform segments



Source: Consumer Engagement with Digital Services 2006

Platform-specific attitudes

Among consumers with platform-specific attitudes, two key reasons generally explained the absence of the more common 'cross-platform' behaviour:

- one platform was considered to be a much more integral part of their life;
- or they had a specific need from one platform which was not present in the others.

Three other segments can be identified in addition to the previous five, which have more differentiated views of the technology and platforms, and are of relevance to the EMG population. These are:

- **The Individualists** are interested in digital benefits, but rather than buying in across all benefits they are more selective in the way they use the technologies. For example, if they are enthusiastic about music, they are very likely to say they listen to music across a number of platforms (mobile, internet platforms, digital television etc).
- **The Traditionalists** have average levels of buy-in to digital benefits but tend to be very traditional in how they use media. This means they use mobile phones mainly for calls and SMS, and the internet mainly for limited/basic communication and information searches.
- **The Communicators** have relatively limited buy-in to digital benefits, with the exception of communication benefits. This means the mobile phone is an important

platform for them given their interest in communications. They also display signs of interest in using the internet for messaging in line with their communication interest.

EMGs compared to UK population segments

In order to add additional EMG-specific insights to this report, Ofcom commissioned an omnibus survey to measure EMG attitudes towards communications services similar to those measured in the original consumer engagement survey. The survey was conducted in November 2006 and was made up of 750 ethnic minority respondents. The survey covered attitudes towards digital services along with some basic measures of take-up across the platforms.

Figure 30 compares the main UK sample with the EMG survey conducted in 2006:

Figure 30 Digital consumer segmentation: All adults compared to EMGs

	All (1017)	EMG total (750)
Enthusiast	11%	13%
Individualist	9%	16%
Traditionalist	12%	13%
Functionalist	17%	15%
Communicator	12%	17%
Economiser	8%	10%
Resistor	11%	3%
Abstainer	21%	14%

Source: Consumer Engagement with Digital Services Report 2006 and Ethnibus survey 2006

In summary, there are more engaged segments (Enthusiasts and Individualists) and fewer low-engagement segments (Abstainers and Resistors) among EMGs. The larger size of the EMG Individualists segment compared to the UK total means that they are not only more engaged, but more selectively engaged in the way they use the technologies.

The larger size of the EMG Communicators segment compared to the UK equivalent also indicates selective interest, but this time specific selective interest in communications benefits (including mobile phones, emails, SMS etc.)

These findings coupled with the lower incidence of 'low-engagement segments' strongly indicate that some EMGs are more knowledgeable about certain aspects of digital functionality, which allows them to be more selective. This could be explained by a variety of reasons including:

- Cost: certain EMG communities are known to have lower average household incomes, therefore cost may cause them to be more selective.
- Access to equipment in the home: EMG households have more people in the household and more children – a consequence of which could be more competition for access to communications services. Previous data showed for example there are fewer EMG households with more than one television compared to the total population. This lower level of in-home access may also cause modifications in interaction with services.

This greater degree of selectivity in engagement with digital services can also be measured in terms of realisation of digital benefits. Questions in the surveys looked at interest in digital functions, access to digital functions and use of digital functions. These gave insight into ‘realisation of digital features’ i.e. whether a person is aware of certain digital features, has an interest in them and uses them. Responses to these questions categorise people into five groups:

- Reject: don’t value a function
- Excluded: value a function but don’t have access to the platform that provides it;
- Unaware: value a function but don’t realise they have a platform that provides it;
- Unused: value a function, aware they have it but don’t use it; and
- Used: value a function and use at least once a month

Among all UK adults, only a minority of those recognising and having access to a benefit were actually using it – meaning there were high levels of unfulfilled benefit. When we compare results against the EMG sample, while this basic conclusion still holds, the findings are diluted, meaning there is a greater tendency to use it if they have it and value it.