

# Open Communications

Produced by: Populus

Fieldwork: 19-21 Feb

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# Summary of key findings

One in four adults have used a PCW for communications services in the last 12 months. This is lower than for insurance and energy but higher than for personal finance.

For communications services, the majority use PCWs solely for recommendations rather than to switch. Purchasing services through PCWs is higher in insurance and energy than in communications.

PCWs are considered by most users to be informative and time-saving, as well as being easy to use and navigate.

The top reason why some consumers don't use PCWs is a perceived lack of the need to compare deals.

Consumers say that finding the right broadband and/or landline deal on PCWs is more difficult than for other types of services.

Data protection is deemed the most important factor for consumers when using PCWs. Older consumers are more concerned than younger consumers about their personal information being protected when using PCWs.

When looking for a new deal, consumers feel least confident understanding their broadband needs and the language used by providers

The main reasons cited for not using certain data when looking for a new deal were perceived lack of relevance, or it not occurring to the consumer to use it.

Consumers think that being able to readily compare their current price with the potential price, as well as knowing the reliability of a potential broadband connection would be useful when comparing deals.

Consumers appear more willing to share data with third party services about their broadband performance, or details of their current contract status and usage, than personal details such as their address and mobile phone location history.

# Background and Objectives

In June 2019, the previous Government published its Smart Data Review consultation which proposed that Ofcom should lead the implementation of an Open Communications initiative. Ofcom is considering the potential impact of this proposal.

It is important that Ofcom understands what role third party intermediaries (TPIs) currently play in the communications market, the barriers that consumers face in using them, and how they could improve take-up of such services when Open Communications comes into effect.

To achieve this, Ofcom has commissioned Populus to conduct an online survey to gather information from consumers on their TPI use and to inform Ofcom's approach to Open Communications in 2020.

# Methodology

## Sample

- 2,075 adults aged 18+ in the UK
- Quotas set on region, gender, age, and working status to represent the UK population.

## Data collection

- Online survey
- Conducted by Populus
- Fieldwork from 19<sup>th</sup> February to 21<sup>st</sup> February

## Data reporting

- Weighted to be nationally representative of the UK
- Source: Populus Online Omnibus
- Data available in pdf tables (aggregated) and SPSS
- Significance testing applied at the 95% confidence level

## Section 1

# Use of price comparison websites and other third parties

# Over one in four UK consumers have used a price comparison website (PCW) in the past 12 months for communications services

## Services used in the past 12 months

	Any service (Net)	Any comms (Net)	Broadband and/or landline	Mobile phone	Energy	Insurance	Personal finance
Price comparison websites or apps e.g. uSwitch or Go Compare	61%	28%	20%	15%	30%	48%	17%
Banking websites or apps for banks which also have a physical presence, including First Direct	59%	-	-	-	-	-	59%
Your online account, either through your providers website or app e.g. BT or Sky	56%	47%	33%	33%	34%	17%	-
High street retailers which offer deals across multiple suppliers e.g. Carphone Warehouse	11%	11%	3%	9%	-	-	-
Mobile only banking apps e.g. Monzo or Starling	10%	-	-	-	-	-	10%
Apps or websites which switch services on your behalf e.g. Flipper or AutoSergei	6%	-	-	-	4%	3%	2%
Bank account aggregating websites or apps e.g. Yolt or Money Dashboard	4%	-	-	-	-	-	4%
Bill-splitting services e.g. Splitwise or Settle Up	2%	-	-	-	-	-	2%
None of these	13%	36%	45%	49%	38%	35%	27%

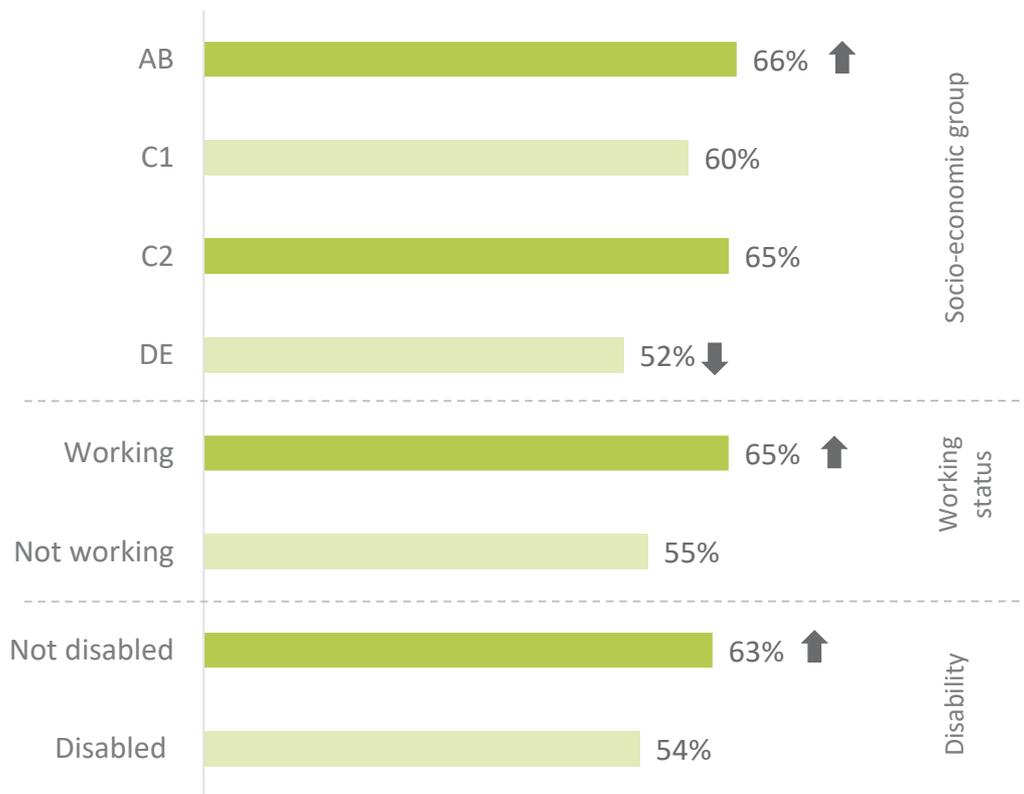
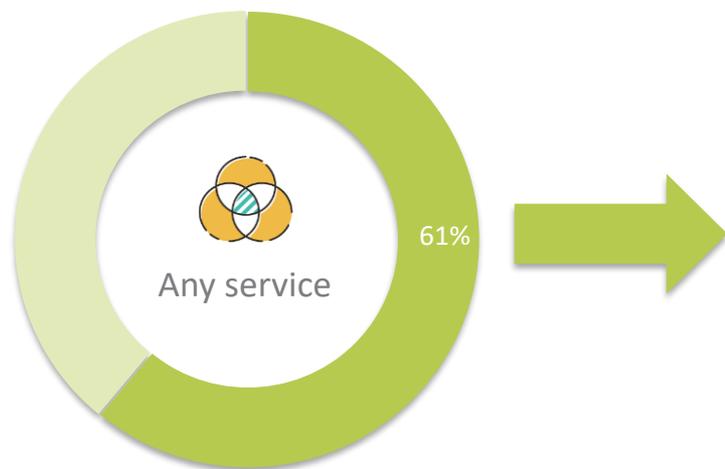
Source: Populus Online Omnibus

Question: A.1 In the past 12 months have you used any of the following for these types of services? Please select all that apply for each column.

Base: All respondents (2,075)

# PCWs are used significantly less by those who are disabled, out of work or in the DE socio-economic group

PCW usage in the past 12 months **for any service**



↓ Significantly lower than all other socio-economic groups at 95% confidence      ↑ Significantly higher than the total at 95% confidence

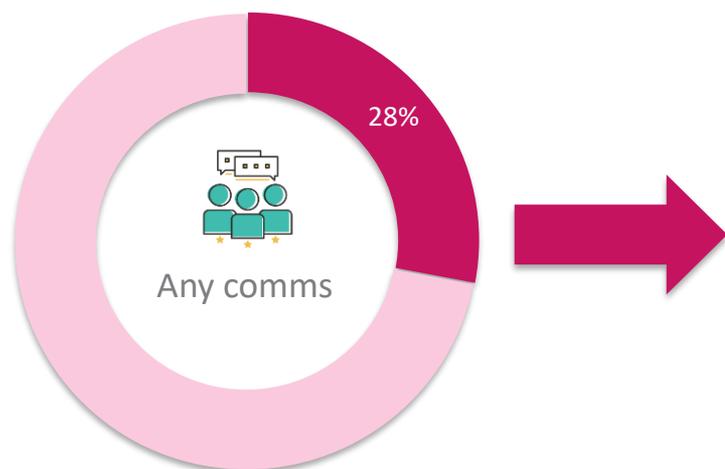
Source: Populus Online Omnibus

Question: A.1 In the past 12 months have you used any of the following for these types of services? Please select all that apply for each column.

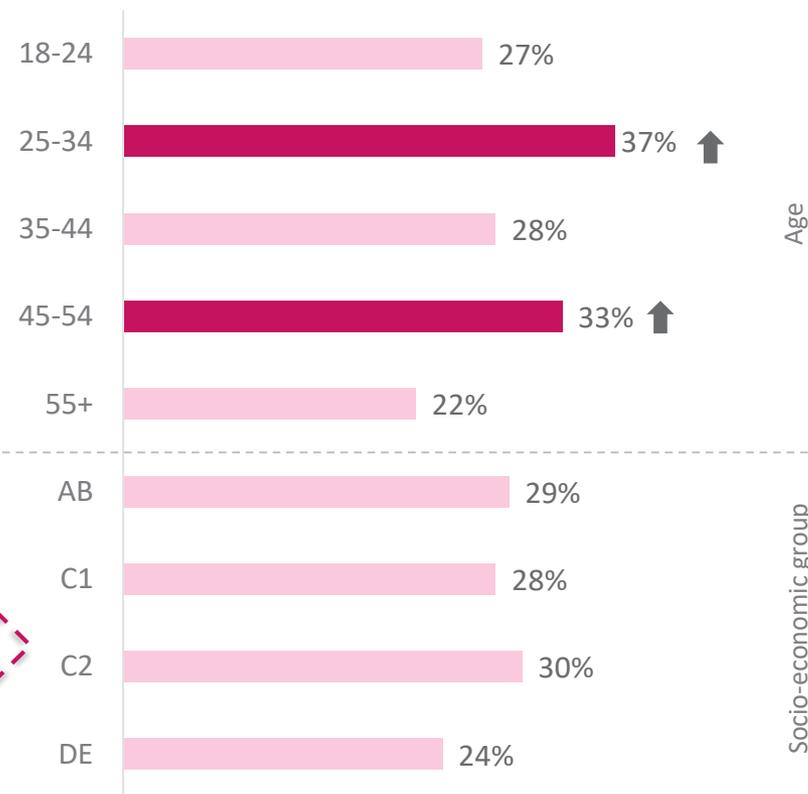
Base: Socio-economic group (347-614), working status (957-1,118), disability (497-1,537)

Those aged under 55 are more likely to use PCWs for communications services.

PCW usage in the past 12 months for **any communications service**



In contrast to the overall usage of PCWs, there is **no significant difference between socio-economic groups when looking at communications services only**, as the difference in usage between these groups is driven by personal finance, insurance and energy.



↑ Significantly higher than the total at 95% confidence

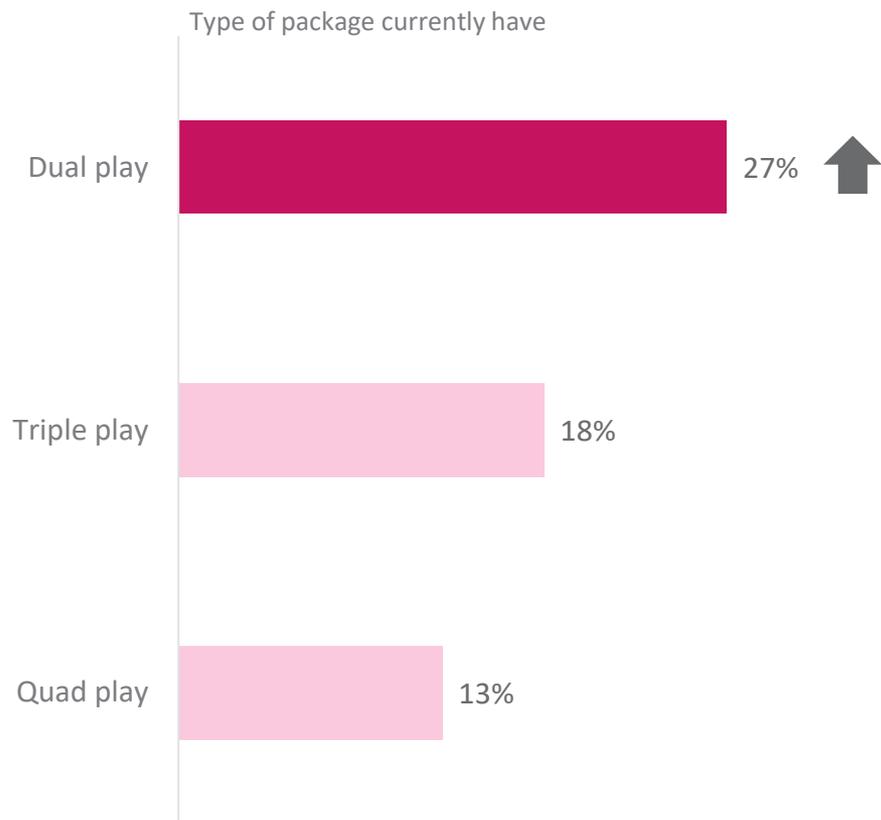
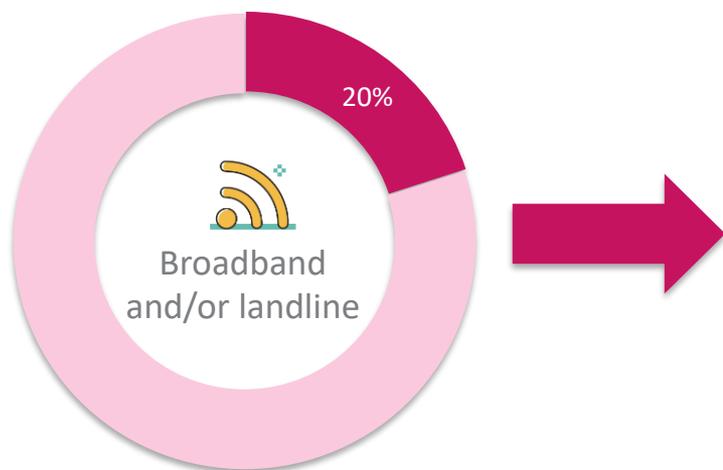
Source: Populus Online Omnibus

Question: A.1 In the past 12 months have you used any of the following for these types of services? Please select all that apply for each column.

Base: Age (147-361) and socio-economic group (347-614)

# The more services people take with the same provider, the less likely they are to use PCWs for broadband or landline services

PCW usage in the past 12 months for broadband or landline services



↑ Significantly higher than the total at 95% confidence

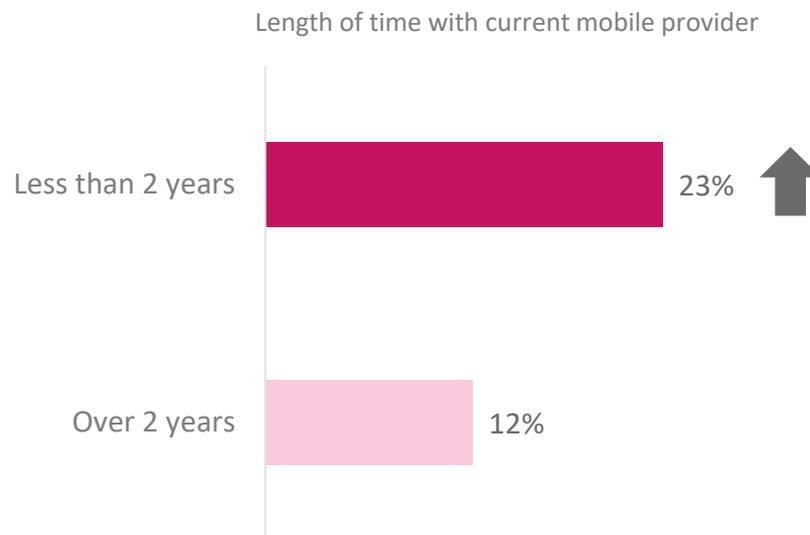
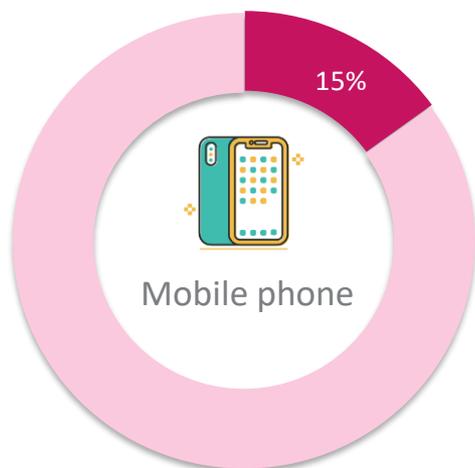
Source: Populus Online Omnibus

Question: A.1 In the past 12 months have you used any of the following for these types of services? Please select all that apply for each column.

Base: Looking for a new comms deal (55-113), packages (244-457)

The longer people have been with their provider, the less likely they are to use PCWs for communications services.

PCW usage in the past 12 months for mobile phones services



This is also the case for broadband and landline - 35% and 37% respectively of those who have been with their broadband/landline provider for less than two years have used PCWs for these services in the past year, compared to 15% of those who have been with their provider for over two years.

↑ Significantly higher than the total at 95% confidence

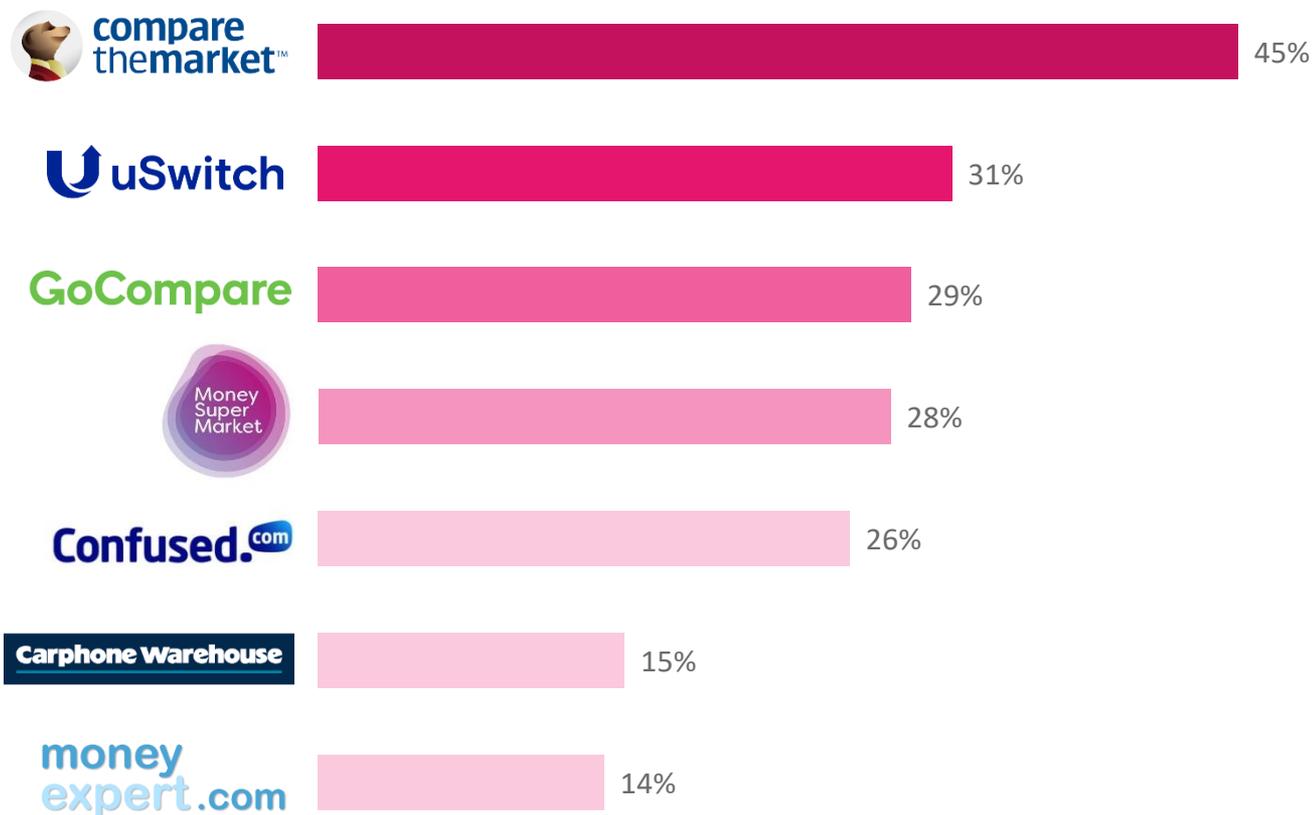
Source: Populus Online Omnibus

Question: A.1 In the past 12 months have you used any of the following for these types of services? Please select all that apply for each column.

Base: Switched in the last 12 months (135-342), length with mobile provider (652-1,297)

# Compare the Market has been the most popular choice for UK consumers looking for a new communications package

PCWs used in the past 12 months for **any communications service**



Note: Other brands were also recalled but at a lower percentage

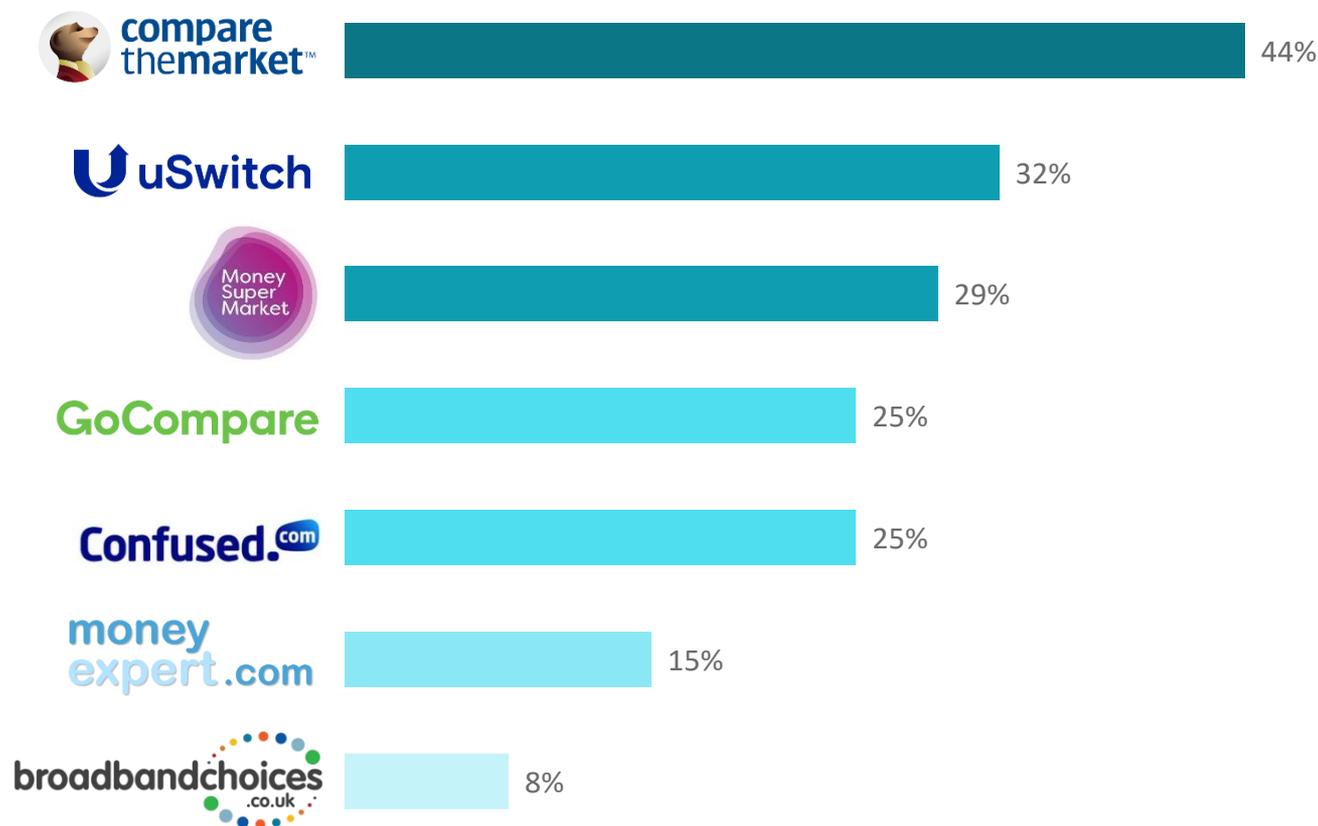
Source: Populus Online Omnibus

Question: A.2 Which of the following price comparison websites or apps have you used in the past 12 months to compare each type of service?

Base: All respondents who have used price comparison website for any communications service (576)

This is also the case for those who have been using PCWs to specifically look for a broadband package in the past 12 months

PCWs used in the past 12 months for **broadband services**



Note: Other brands were also recalled but at a lower percentage

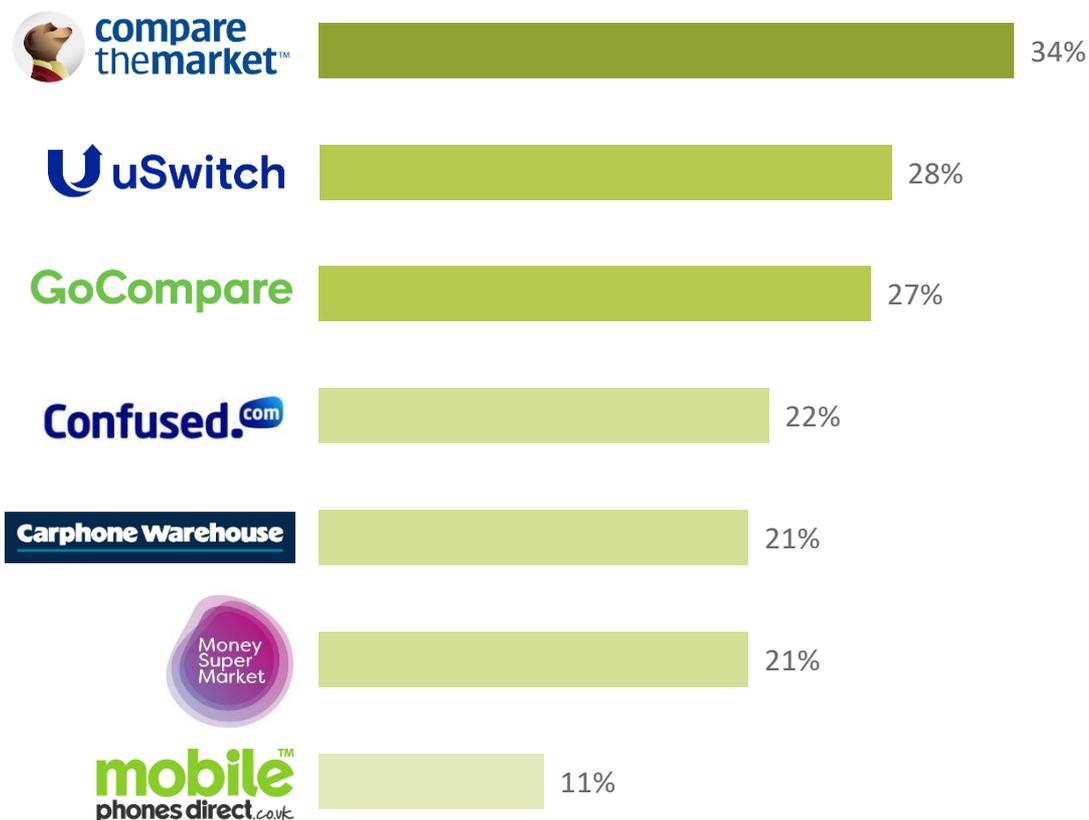
Source: Populus Online Omnibus

Question: A.2 Which of the following price comparison websites or apps have you used in the past 12 months to compare each type of service?

Base: All respondents who have used price comparison website for broadband services (416)

When it comes to looking for a mobile phone package, there seems to be more of an equal distribution across the various PCWs used

PCWs used in the past 12 months for **mobile phone services**



Note: Other brands were also recalled but at a lower percentage

Source: Populus Online Omnibus

Question: A.2 Which of the following price comparison websites or apps have you used in the past 12 months to compare each type of service?

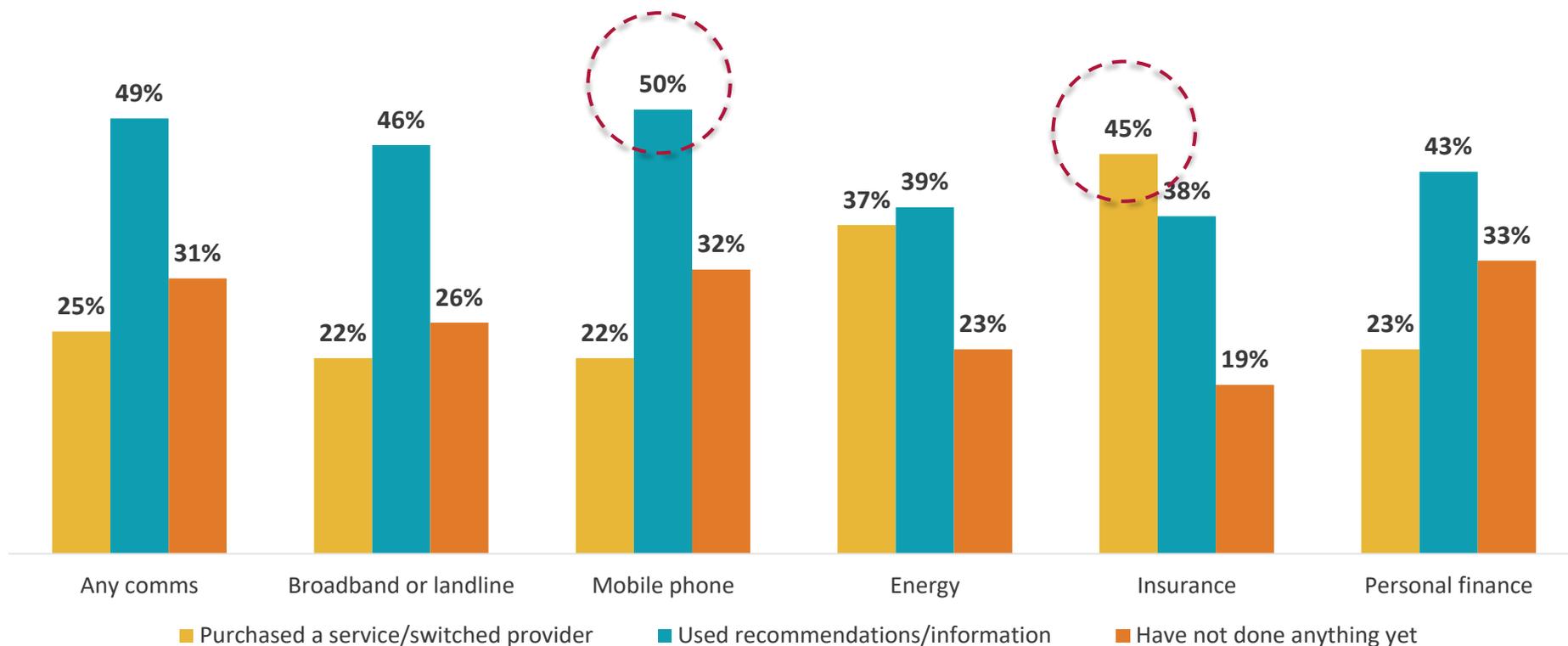
Base: All respondents who have used price comparison website for mobile services (306)

## Section 2

# Reasons for using/not using price comparison websites

## PCWs are primarily used for recommendations/information, though switching through a PCW is more likely in energy and insurance

How PCWs have been used in the past 12 months



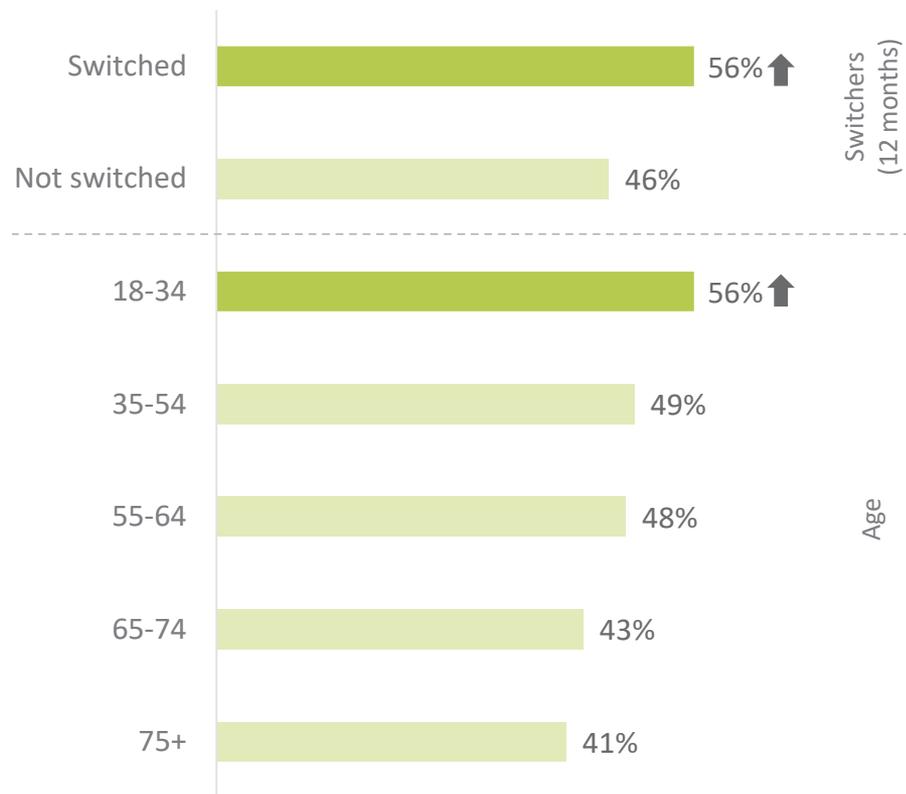
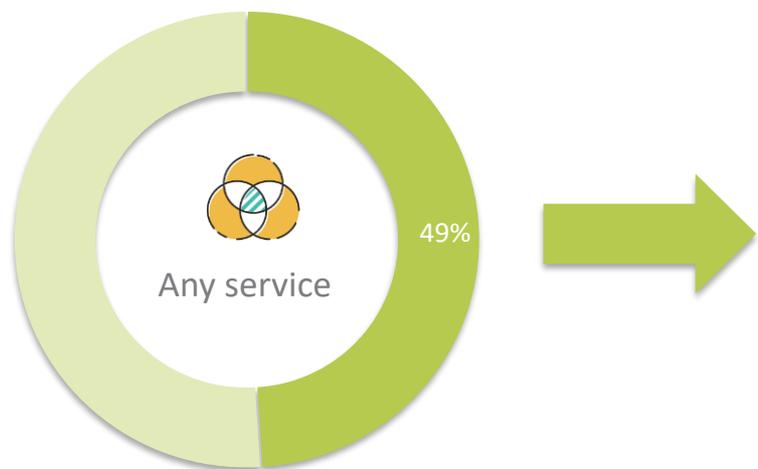
Source: Populus Online Omnibus

Question: A.3 Thinking about the websites or apps you said you have used, please indicate if you did any of the following for each service.

Base: All respondents who have used price comparison website for service (265-947)

# Those who have switched providers in the past year are most likely to have used these types of websites as a resource

Used recommendations/information in the past 12 months (any service)



↑ Significantly higher than the total at 95% confidence

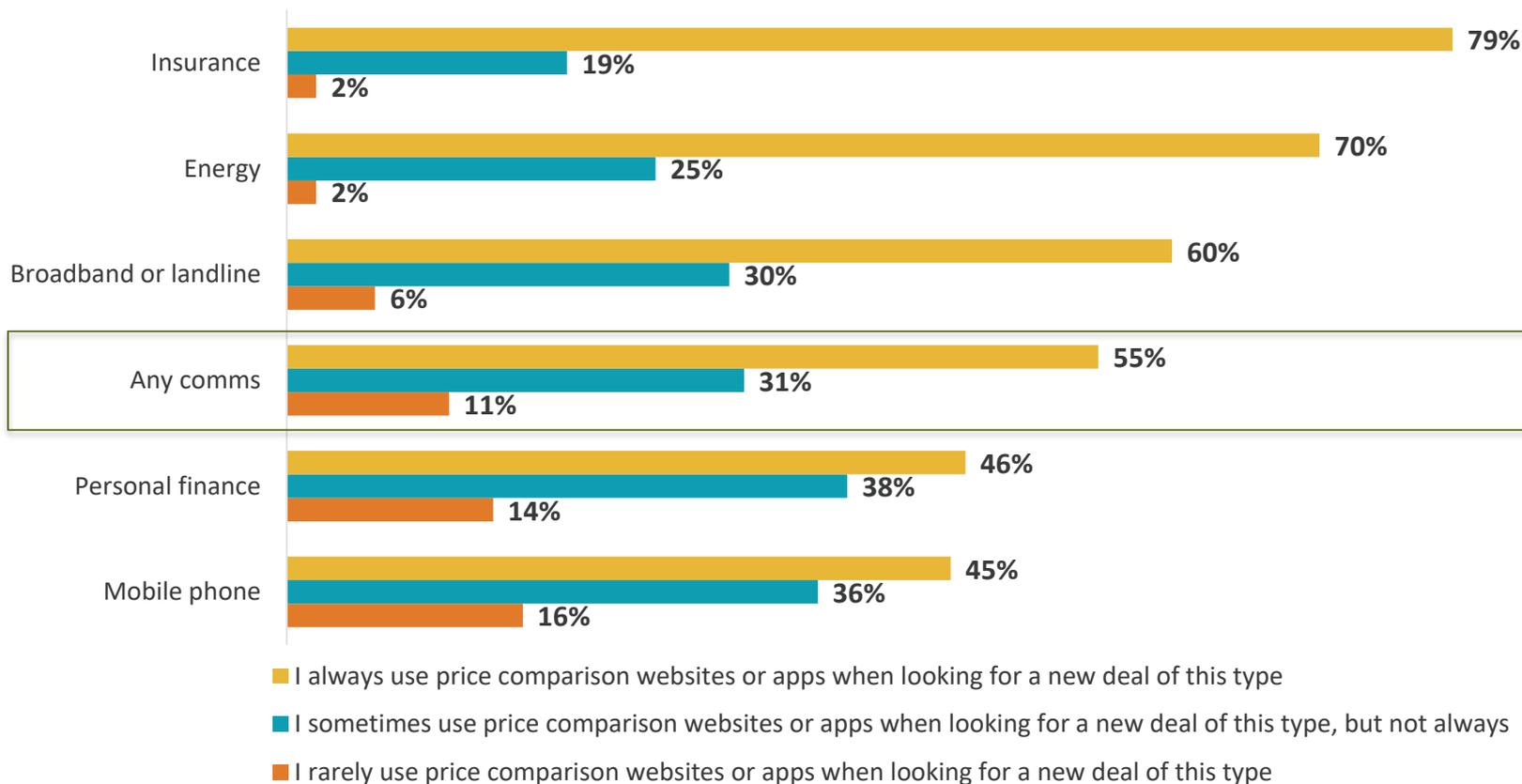
Source: Populus Online Omnibus

Question: A.3 Thinking about the websites or apps you said you have used, please indicate if you did any of the following for each service.

Base: Switched (430), not switched (773) in the past 12 months; 18-34 (320), 35-54 (418), 55-64 (191), 65-74 (190) and 75+ (84)

Amongst those who use PCWs, nearly six in ten always use these sites when looking for a new communications deal.

### Frequency of using PCWs when looking for a new deal



Source: Populus Online Omnibus

Question: A.4 When you are looking for and comparing deals in each of the following areas, which of the following statements best describes your use of price comparison websites or apps?

Base: All respondents who have used price comparison website for service (306-969)

# Those who have been with their broadband/landline provider for up to 2 years are more likely to always use PCWs for new deals

Those who always use PCWs when looking for a new deal of this type

Insurance 79%		Energy 70%		Broadband and/or landline 60%		Personal finance 46%		Mobile phone 45%	
Up to 2 years with broadband provider	86%	People who always use PCWs for BB/LL/Pay TV	93%	Own a dual play (BB+LL) package	71%	People who always use PCWs for mobile	75%	Up to 2 years with landline provider	59%
Up to 2 years with landline provider	85%	People who always use PCWs for mobile	82%	Up to 2 years with landline provider	69%	People who always use PCWs for BB/LL/Pay TV	67%	Up to 2 years with broadband provider	56%
Used PCWs in the past 12 months across any comms	84%	55-64 year olds	82%	Up to 2 years with broadband provider	68%	Used PCWs for energy the last 12 months	51%	Up to 2 years with mobile provider	55%

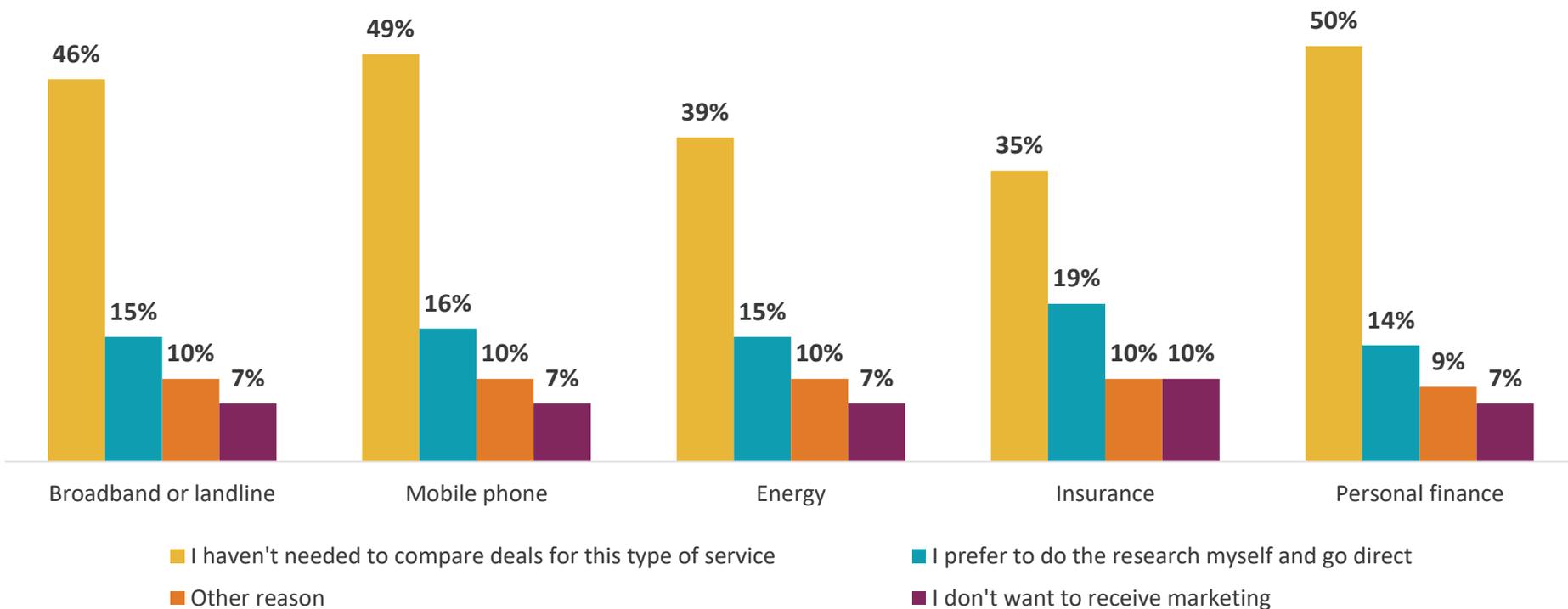
Source: Populus Online Omnibus

Question: A.4 When you are looking for and comparing deals in each of the following areas, which of the following statements best describes your use of price comparison websites or apps?

Base: All respondents who have used price comparison website for service (306-969)

# For each type of service, the top reason for not using PCWs is “not needing to compare deals”

Reasons for not using PCWs in the past 12 months



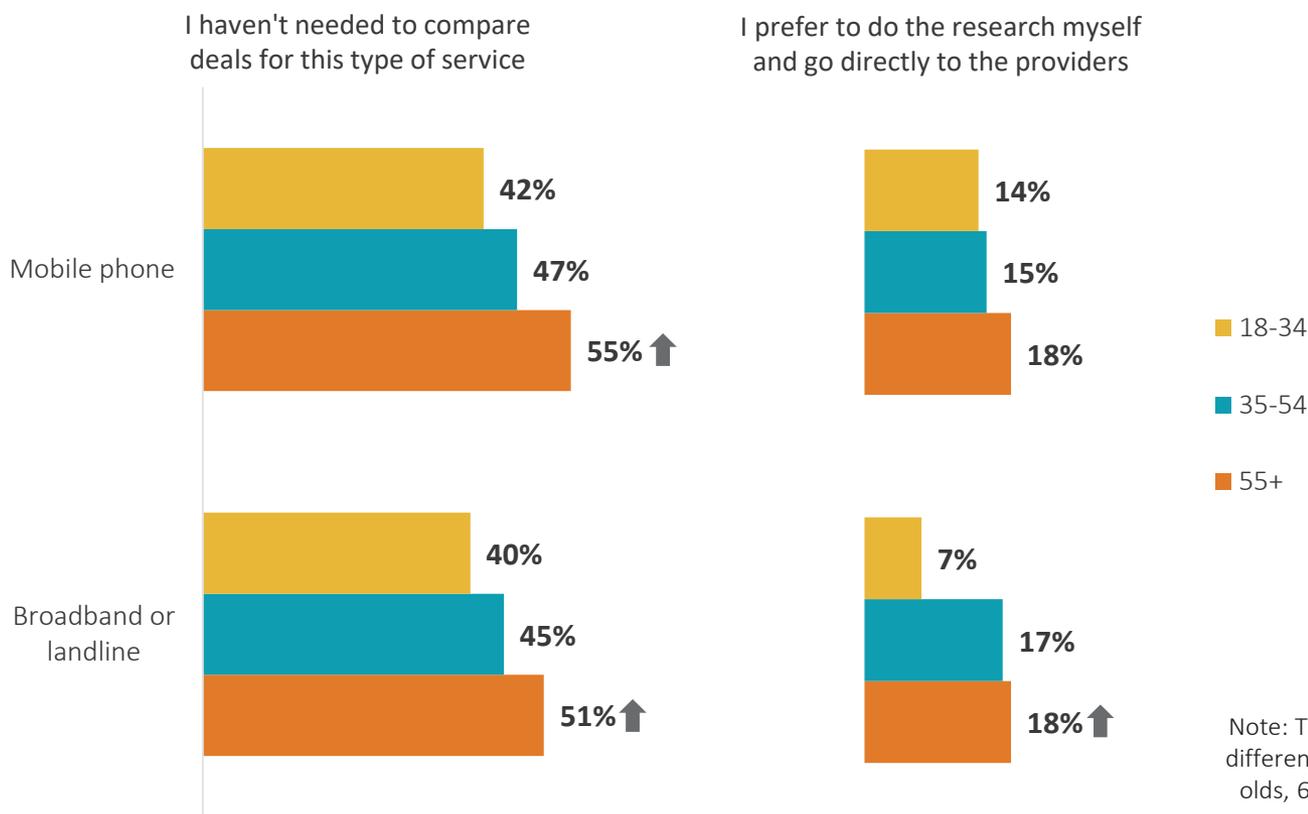
Source: Populus Online Omnibus

Question: A.5 Why have you not used any price comparison websites or apps in the past 12 months to find and compare deals in the following areas?

Base: All respondents who have not used price comparison website for service (1,106-1,769)

# Those aged 55+ are most likely to feel they have not needed to compare deals, with one in five preferring to go direct to providers

## Reasons for not using PCWs in the past 12 months by age



↑ Significantly higher than the total at 95% confidence

Note: There were no significant differences between 55-64 year olds, 65-74 year olds and 75+ year olds for both aspects shown here

Source: Populus Online Omnibus

Question: A.5 Why have you not used any price comparison websites or apps in the past 12 months to find and compare deals in the following areas?

Base: All respondents who have not used price comparison website for comms services 18-34 (464-467), 35-54 (533-559), 55+ (662-743)

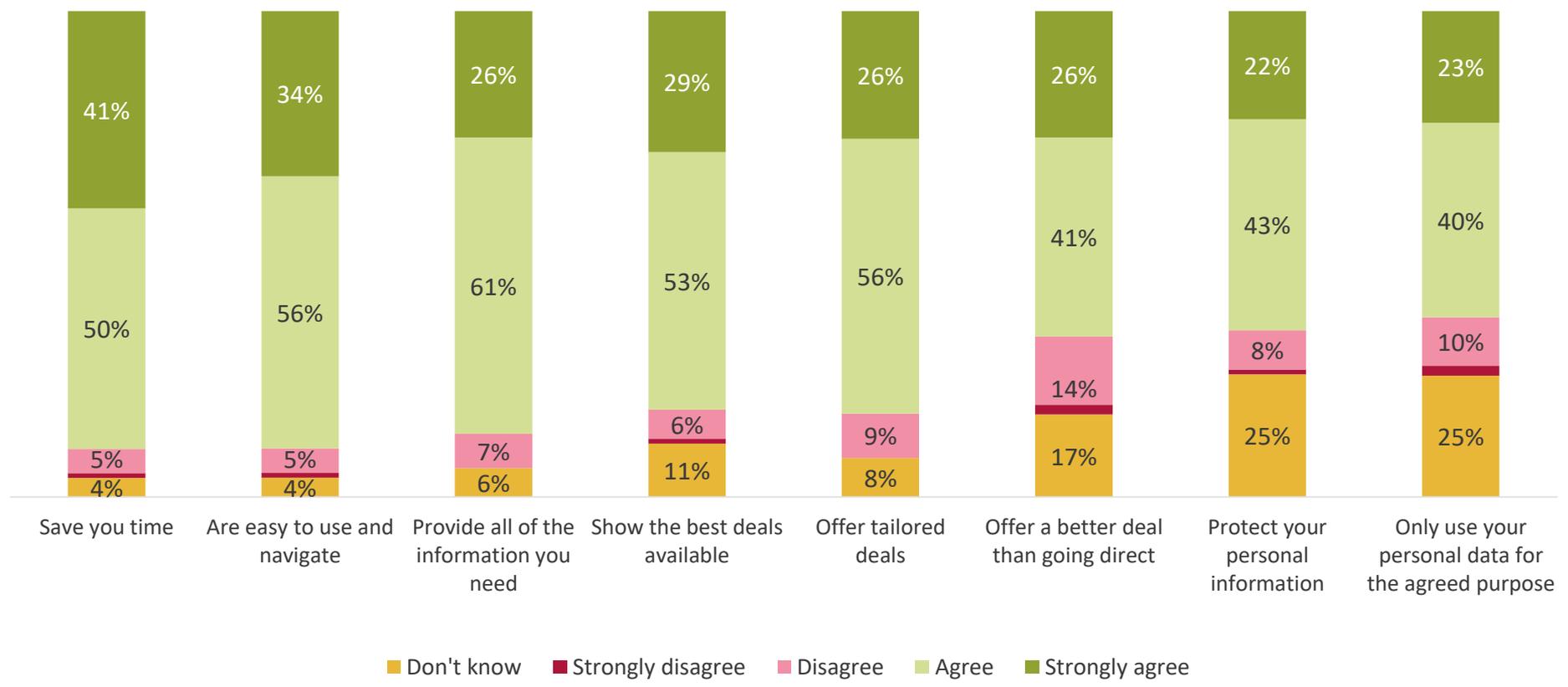
# Section 3

## Perceptions of price comparison websites

# PCWs are considered to be informative, time-saving websites, which show the best deals available



## Perceptions of PCWs when searching for communications services



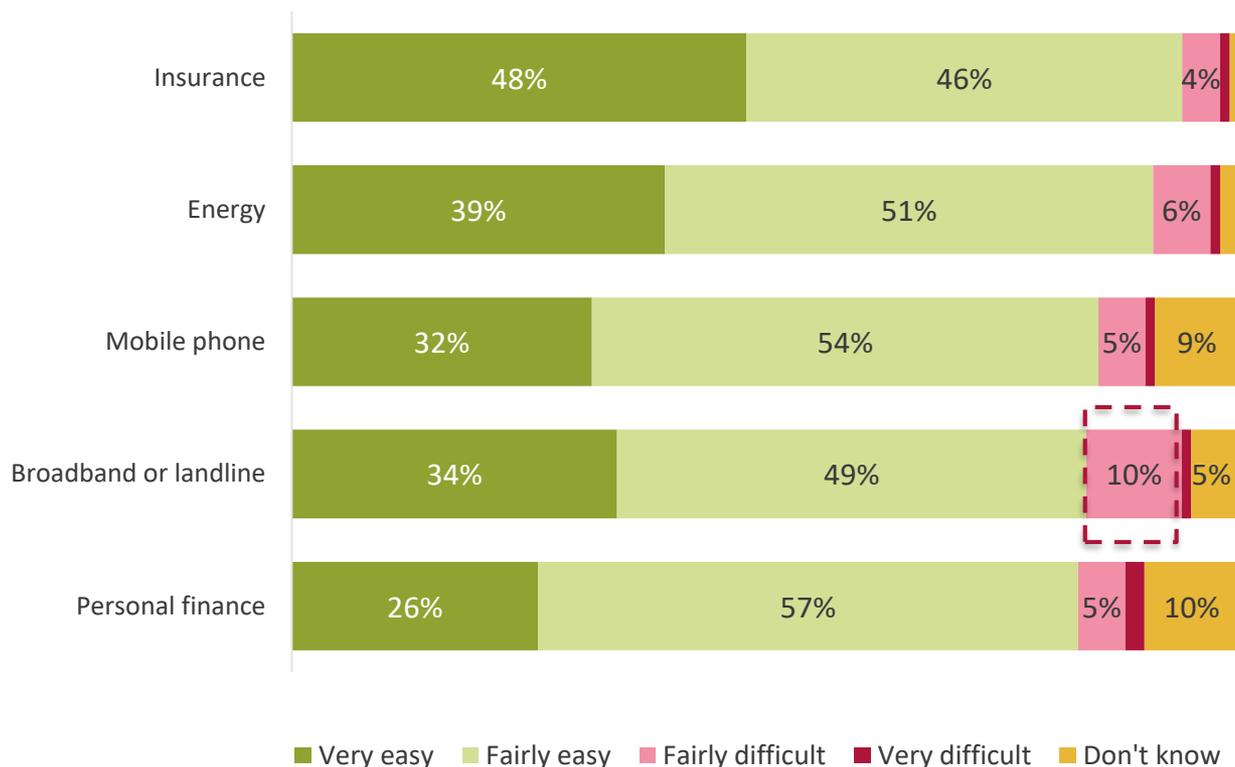
Source: Populus Online Omnibus

Question: A.8 And thinking about communications services in general (broadband, landline, TV or mobile phones), to what extent do you think that price comparison websites or apps...?

Base: All respondents who have used price comparison website for broadband/ mobile service (563)

# The majority who use PCWs thought it was easy to find the right product or service on the site

Level of ease or difficulty of finding the right product/service on PCWs



55+ year olds (20%) and those who have been with their **landline (18%)** and/or **broadband (16%)** provider for over 2 years are more likely to think it was difficult to find the right broadband or landline deal for them.

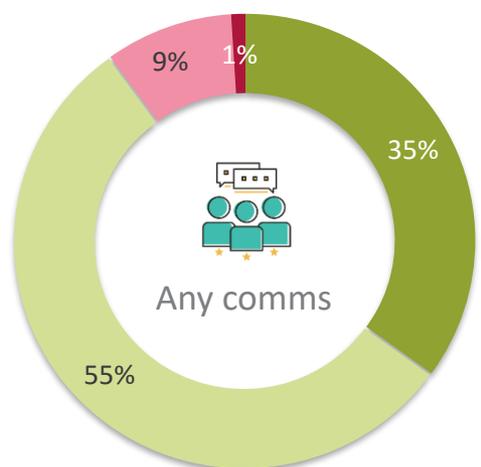
Source: Populus Online Omnibus

Question: A.7 Thinking about the most recent time you used a price comparison website for the following, how easy or difficult was it to find the right product/service for you?

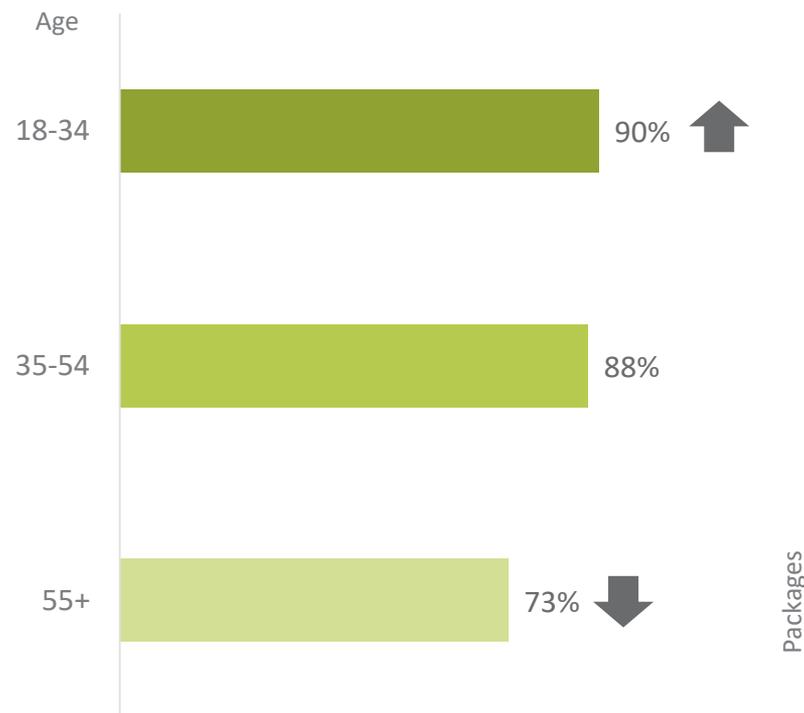
Base: All respondents who have used price comparison website for service (306-969)

# 18-54s find it significantly easier to find the right communications product/service on PCWs than those aged 55+

Level of ease or difficulty of finding the right communications product/service on PCWs



- Very easy
- Fairly easy
- Fairly difficult
- Very difficult



\*Caution: Low base sizes for packages

↓ Significantly lower than other age groups at 95% confidence    ↑ Significantly higher than the total at 95% confidence

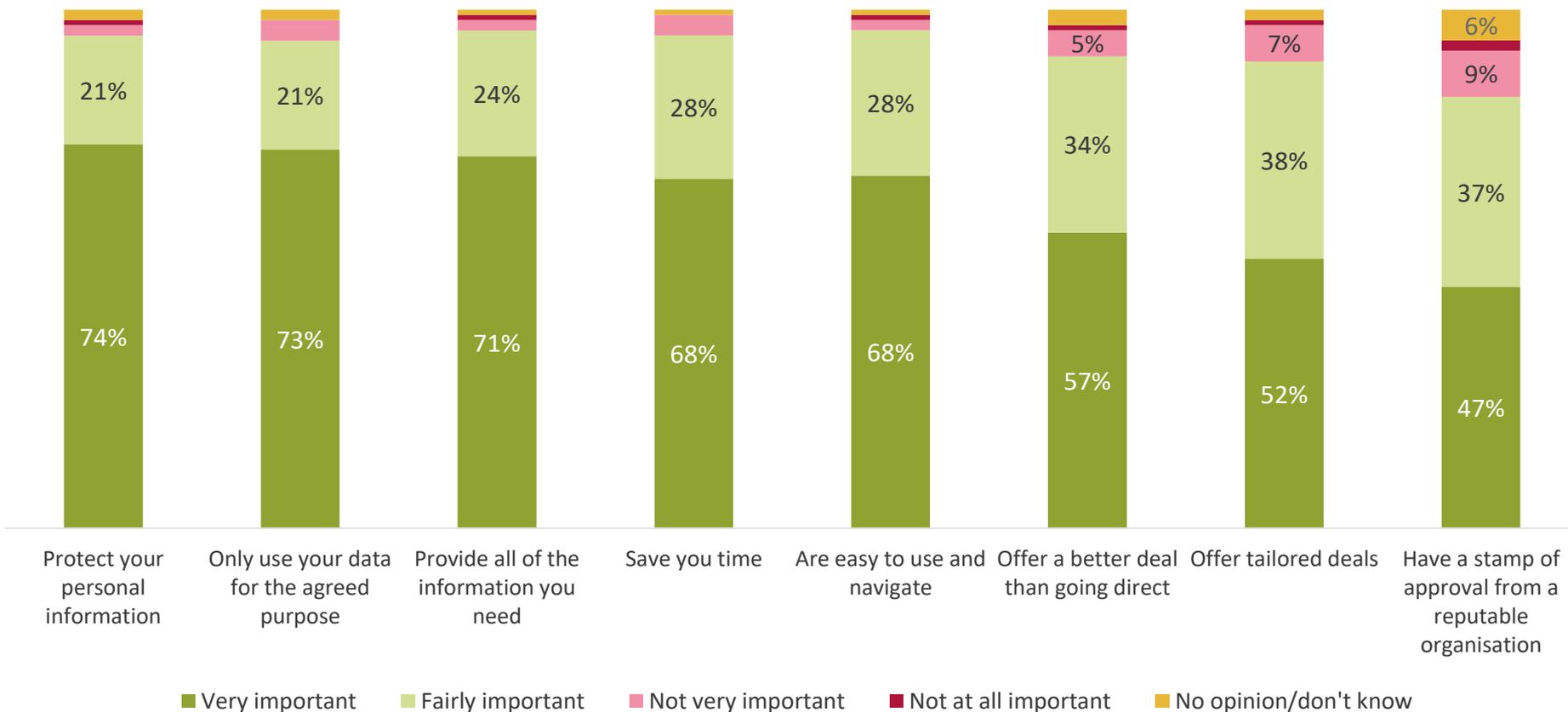
Source: Populus Online Omnibus

Question: A.7 Thinking about the most recent time you used a price comparison website for the following, how easy or difficult was it to find the right product/service for you?

Base: All respondents who have used price comparison website for a communications service (563), 18-55+ (177-204), packages (54-143)

# It is very important for the majority who use PCWs that these sites protect their personal data, and only use their data as agreed

## Important factors when using a PCW



Source: Populus Online Omnibus

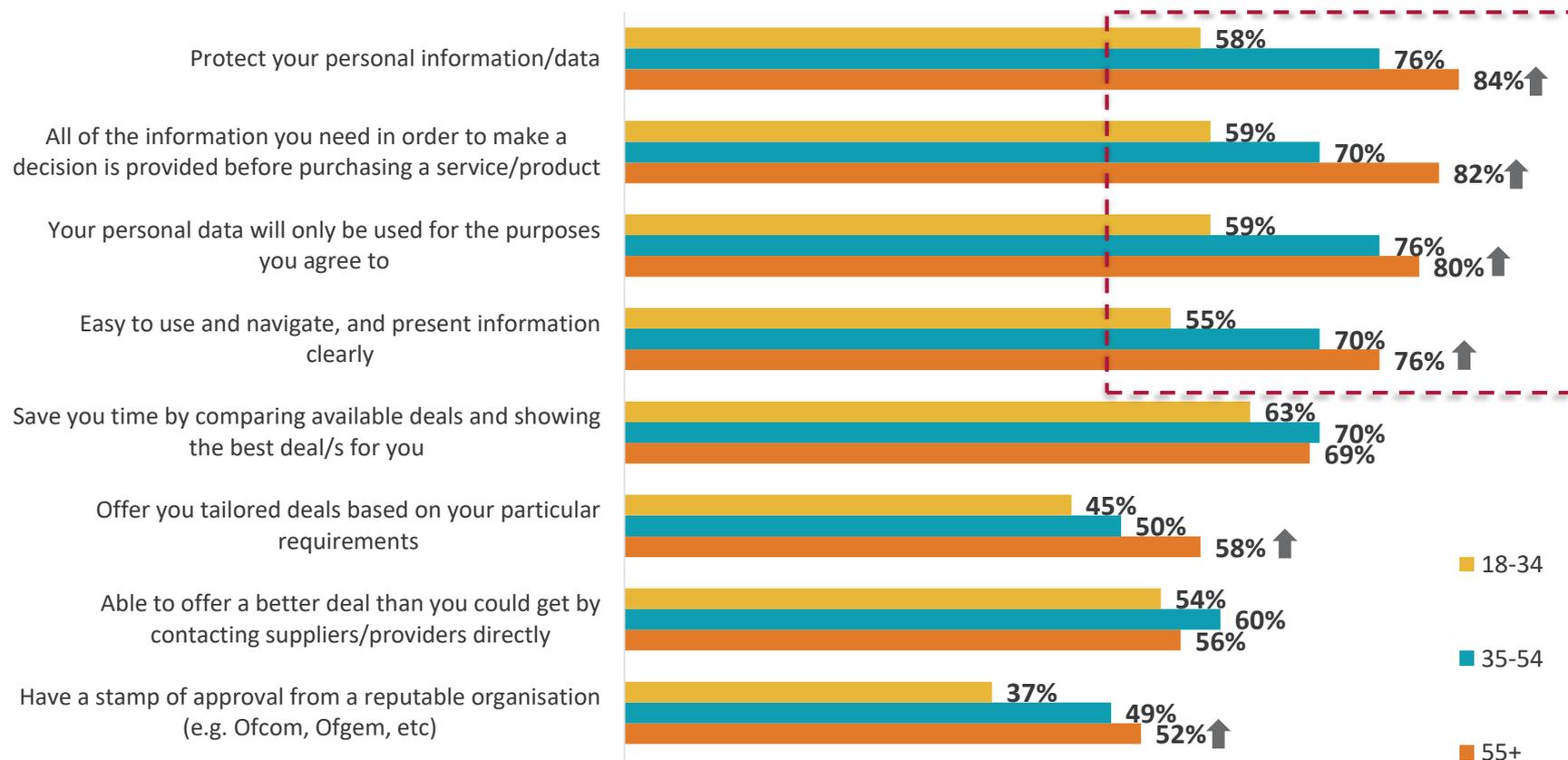
Question: A.6 Thinking about when you use price comparison websites or apps, how important is it that...?

Base: All respondents who have used price comparison websites (1,226)

Note: This question relates broadly across all types of services/sectors

# Those aged 55+ feel more strongly about the protection of their personal data than younger age groups

## Important factors when using a PCW – Very important



↑ Significantly higher than the total at 95% confidence

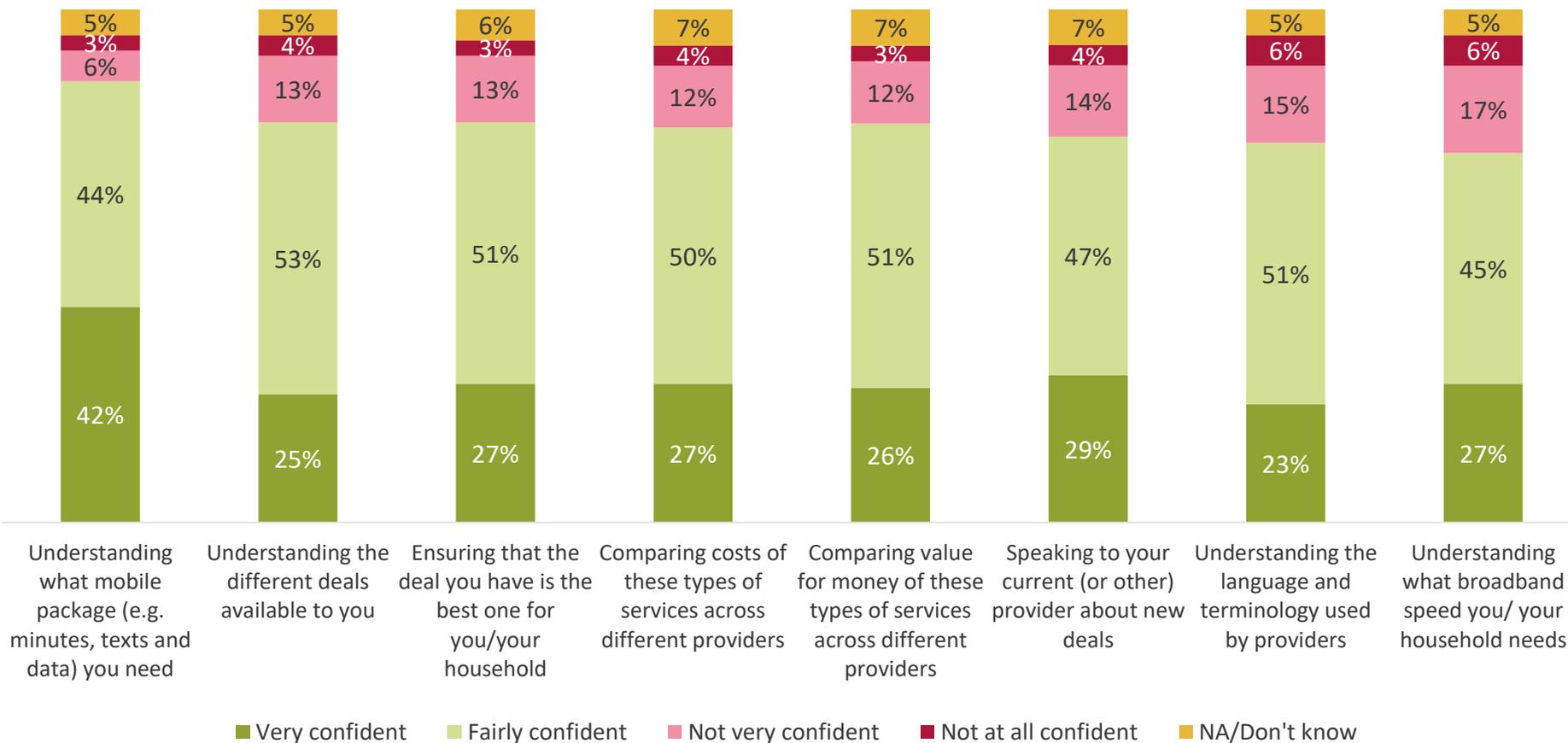
Source: Populus Online Omnibus

Question: A.6 Thinking about when you use price comparison websites or apps, how important is it that...?

Base: All respondents who have used price comparison websites aged 18-34 (326), 35-54 (425), 55+ (475)

# The majority of consumers are confident in understanding what mobile package they need, but less confident understanding broadband speed needs

## Confidence levels when looking for a new deal



Source: Populus Online Omnibus

Question: B.6 How confident do you feel doing each of the following with regards to your communications (mobile phone, broadband, landline or TV) services?

Base: All respondents who have any service/ broadband service/ mobile service (2,062)

# A lack of understanding and knowledge of broadband speeds, and the language used by providers, has a negative impact on confidence

## Reasons for not feeling confident looking for a new deal

Understanding what broadband speed you need		Understanding the language used by providers		Speaking to current provider about new deals	
<b>I don't know enough</b> about technology / computers / the internet / broadband speeds / data usage etc.	<b>32%</b>	Information provided can be <b>difficult to understand</b> / industry terminology used is not clear / acronyms are used	<b>36%</b>	<b>I do not believe I'd be given the best deal</b> / suppliers prefer to make profit over customer satisfaction	<b>10%</b>
<b>I don't know what is best</b> for my needs or what I require	<b>17%</b>	<b>It is not easy to understand</b> / it is confusing / complicated / easy to get mixed up	<b>19%</b>	<b>Lack of confidence</b> / I become anxious	<b>9%</b>

Source: Populus Online Omnibus

Question: B.7 You said you are not confident about the following. Why is this?

Base: All respondents who are not confident (325)

# Women, 55+ year olds, and those who haven't switched recently are significantly less confident when looking for deals

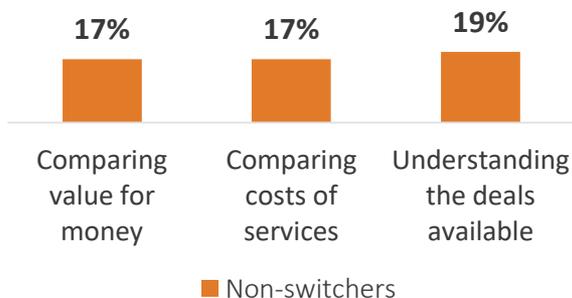
## Confidence levels when looking for a new deal

Consumers who **haven't switched any services** in the last 12 months lack confidence, particularly when trying to understanding the deals available.



### Not confident:

(NET: not very confident/not at all confident)

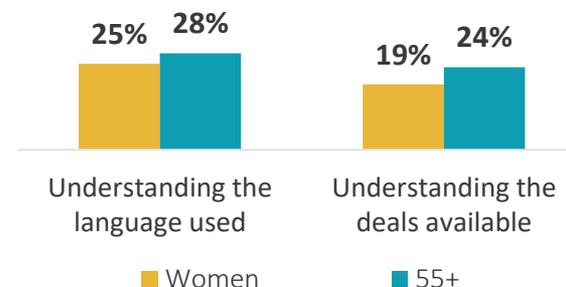


**Women and older people** are less confident, particularly when understanding the language used and the deals available.



### Not confident:

(NET: not very confident/not at all confident)



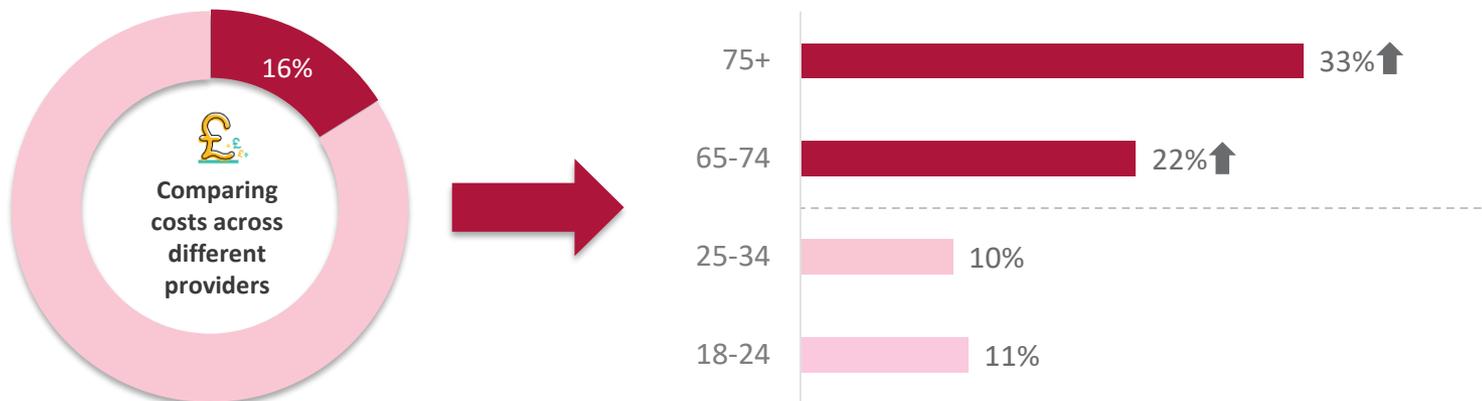
Source: Populus Online Omnibus

Question: B.6 How confident do you feel doing each of the following with regards to your communications (mobile phone, broadband, landline or TV) services?

Base: All respondents who have any service/ broadband service/ mobile service – Non switchers (1,460), Women (1,020), 55+ (810)

# The two oldest age groups are significantly less confident comparing costs across different providers than the two youngest ones

Reasons for not feeling confident comparing costs across different providers



Top reasons for lack of confidence comparing costs	
It is not easy to understand / it's confusing / complicated (16%)	There are so many options available / so much to consider (12%)

↑ Significantly higher than the total at 95% confidence

Source: Populus Online Omnibus

Question: B.6 How confident do you feel doing each of the following with regards to your communications (mobile phone, broadband, landline or TV) services? / B.7 You said you are not confident about the following. Why is this?

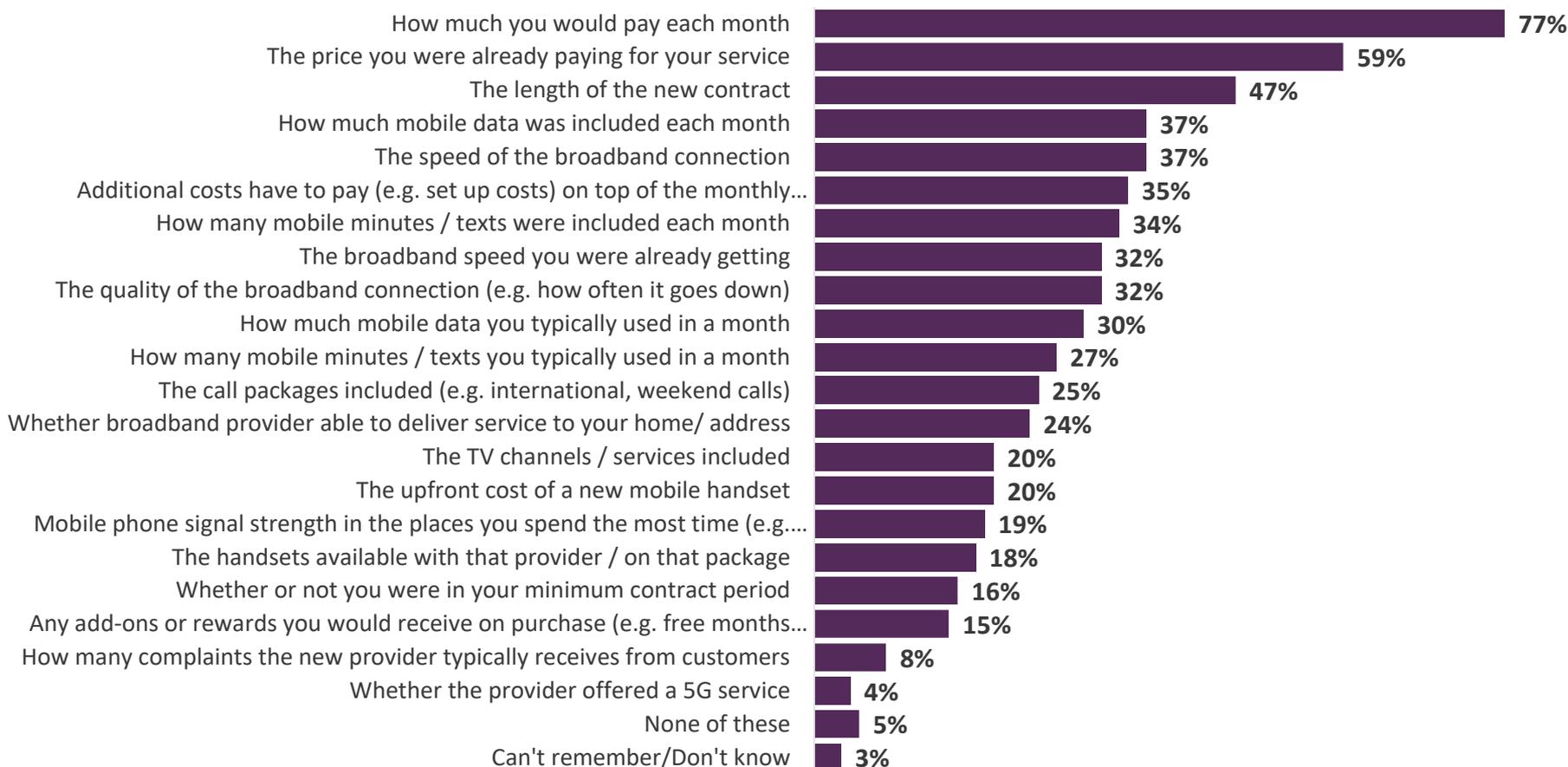
Base: All respondents who have any service/ broadband service/ mobile service (2,062) / Respondents who are not confident comparing costs (322) / 18-24 (230), 25-34 (344), 65-74 (360) and 75+ (147)

## Section 4

# Factors considered when looking for a new deal in general

# When switching plans, price is the key driver in the decision process across all the services surveyed

## Factors taken into account when signing up to a new deal



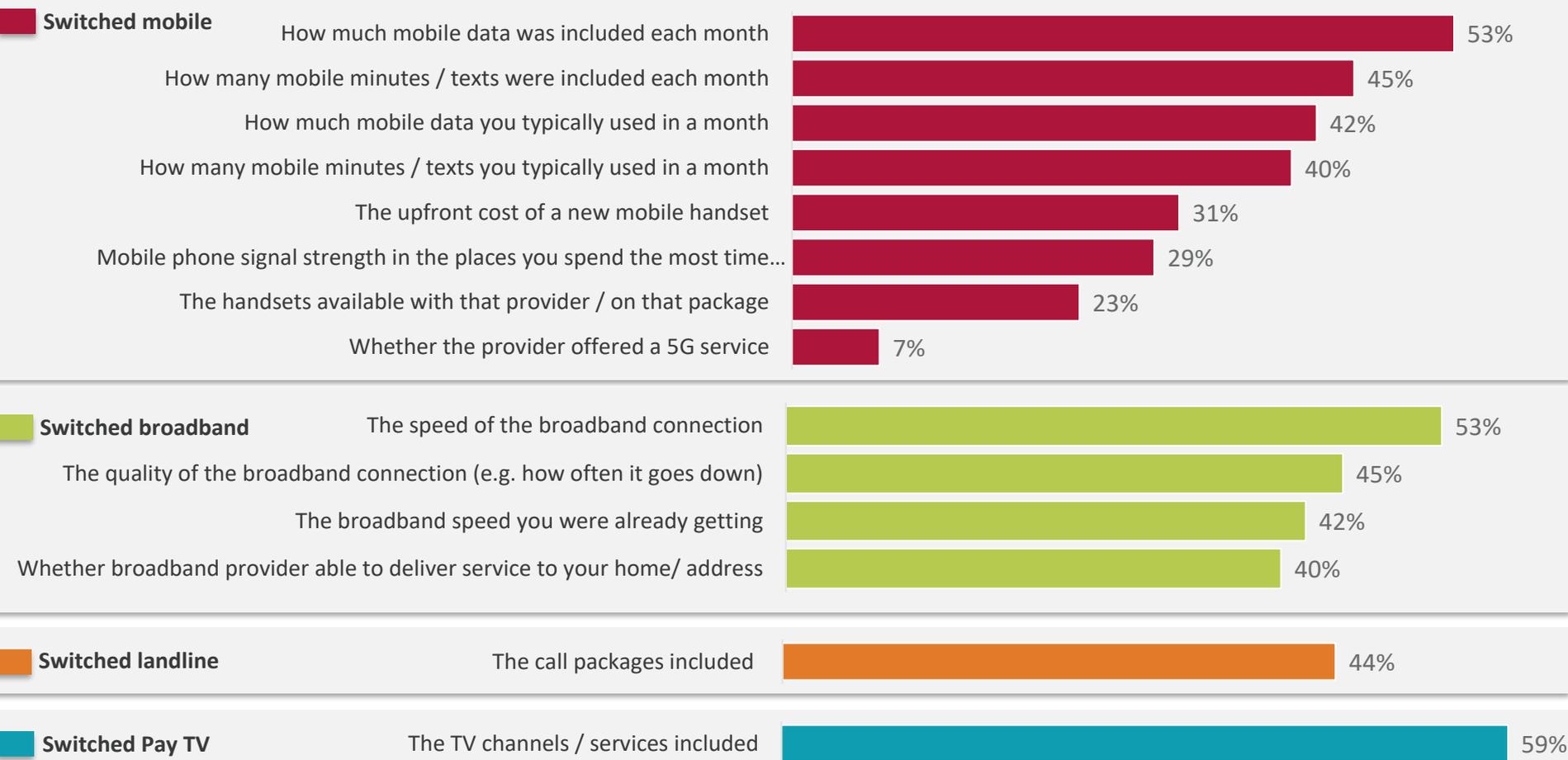
Source: Populus Online Omnibus

Question: B.8 You said you either switched provider or took a new contract with your current provider for the following services... Which of the following factors did you consider when you took out these services?

Base: All respondents who have changed provider or taken out new contract for any communications service in last 12 months (1,029)

For mobile switchers, half took the amount of mobile data included into account. For broadband, connection speeds were front of mind.

Factors taken into account when signing up to a new deal, among those who'd switched specific services in past 12 months



Source: Populus Online Omnibus

Question: B.8 You said you either switched provider or took a new contract with your current provider for the following services... Which of the following factors did you consider when you took out these services?

Base: All respondents who have changed provider or taken out new contract in last 12 months (1,029) – Mobile (342), Broadband (344), Landline (219), Pay TV (135)

# The majority didn't take certain factors into account as they were not considered relevant or important

Reasons for not considering specific factors when switching or signing up to a new contract

	The price you were already paying for your service	Whether or not you were in your minimum contract period	What mobile phone signal strength would be like in the places you spend the most time	How many mobile minutes / texts you typically used in a month	How much mobile data you typically used in a month	The broadband speed you were already getting
Base	418	863	477	389	364	364
Wasn't relevant	34%	43%	26%	37%	32%	30%
Too much hassle to find the information	6%	5%	7%	8%	5%	6%
Didn't know how to use or didn't understand the information	5%	2%	5%	3%	4%	8%
Didn't occur to me to use this information	13%	10%	20%	9%	12%	11%
Not important to me	14%	18%	16%	24%	23%	18%
Didn't know where to find the information	3%	6%	9%	5%	5%	8%
Other reason	12%	6%	9%	6%	9%	10%
Can't remember/Don't know	20%	15%	14%	14%	16%	13%

**Key:** Percentages are among those who didn't indicate that they considered that specific factor\* when they...

- Changed provider or took out a new contract for any communications service in the last 12 months
- Changed provider or took out a new mobile phone contract in the last 12 months
- Changed provider or took out a new broadband contract in the last 12 months

Source: Populus Online Omnibus

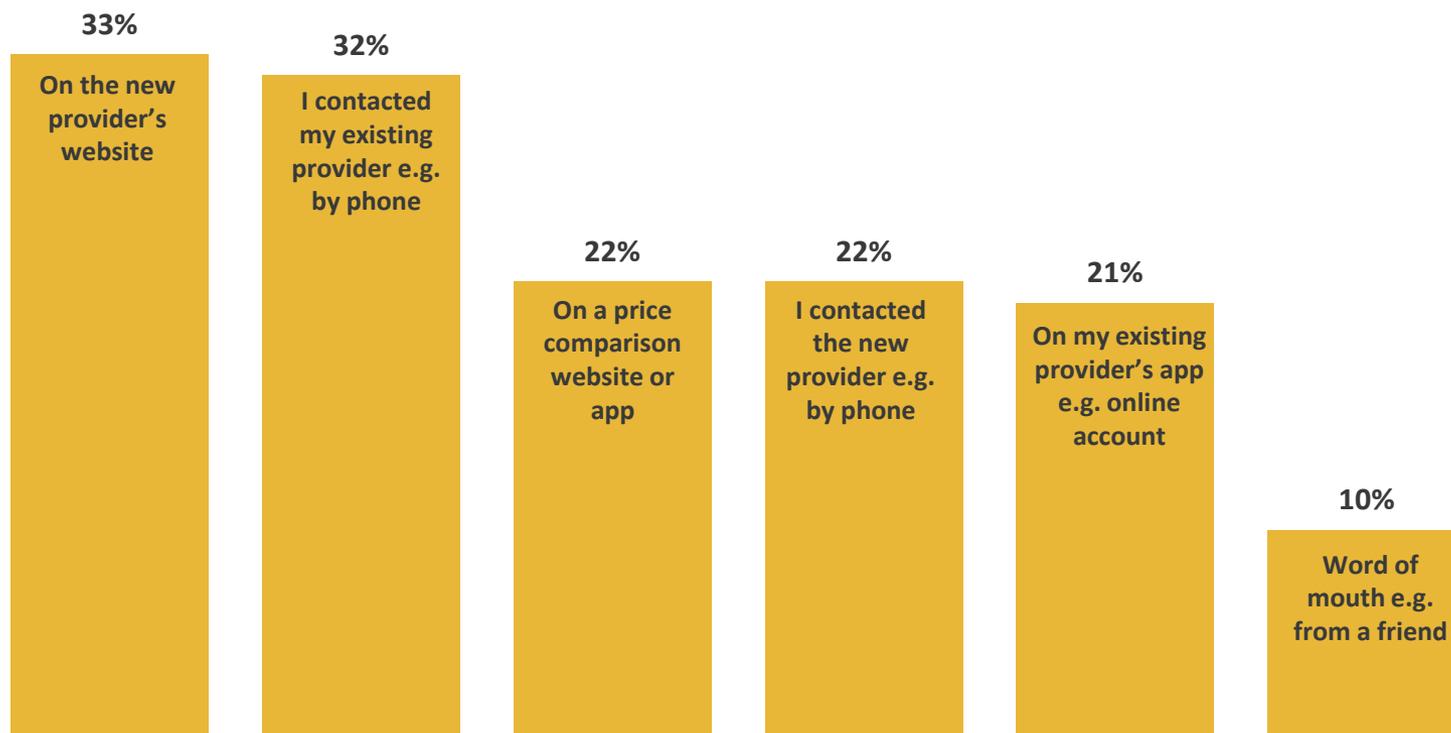
Question: B.9b You said you did not take the following factors into account when taking out your services. Why not?

Base: All respondents who have changed provider or taken out new contract in last 12 months and did not consider factor (see chart)

\* Note that each factor was asked if they didn't indicate they had taken these specific factors into account at B8, but this doesn't necessarily mean they didn't subconsciously take it into account based on existing knowledge. For example, in the case of mobile signal strength they may have used the provider in the past, or automatically assumed that it was OK. Furthermore, in the case of re-contracting certain factors may not have been important or relevant due to personal circumstance (such as whether or not they are in their minimum contract period).

When taking out a new deal, consumers' most-used sources of information were the new provider's website or direct contact with their existing provider

Sources of information when switching or signing up to a new contract



Sources of information

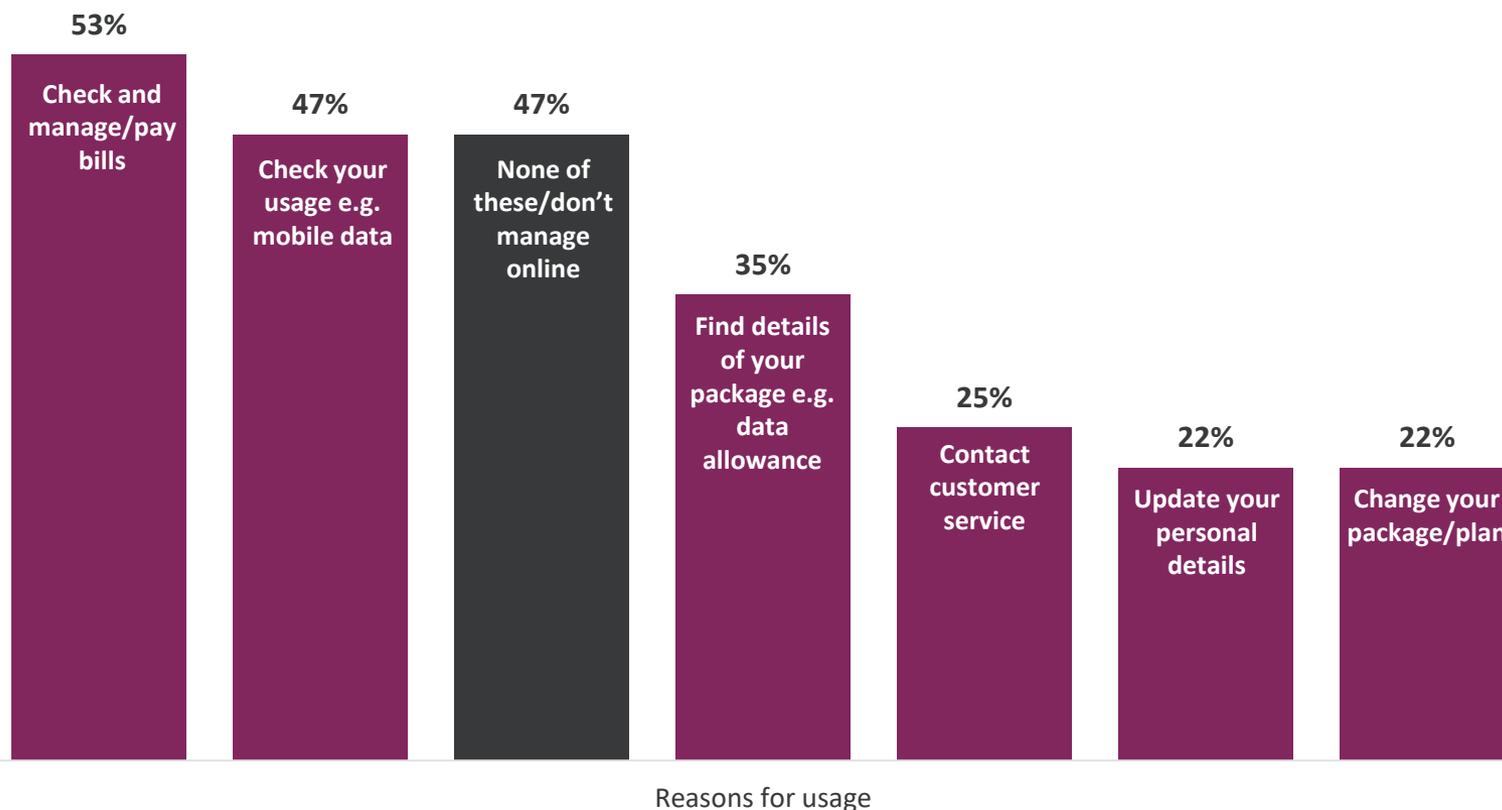
Source: Populus Online Omnibus

Question: B.9a Thinking about all the factors that you said you took into account, where did you find the information that you needed?

Base: All respondents who have changed provider or taken out new contract in last 12 months and considered any factors (963)

## One in five also use their existing provider's website or app to change plans, however most use the platform to check bills or usage

What people use their online accounts for (any service)



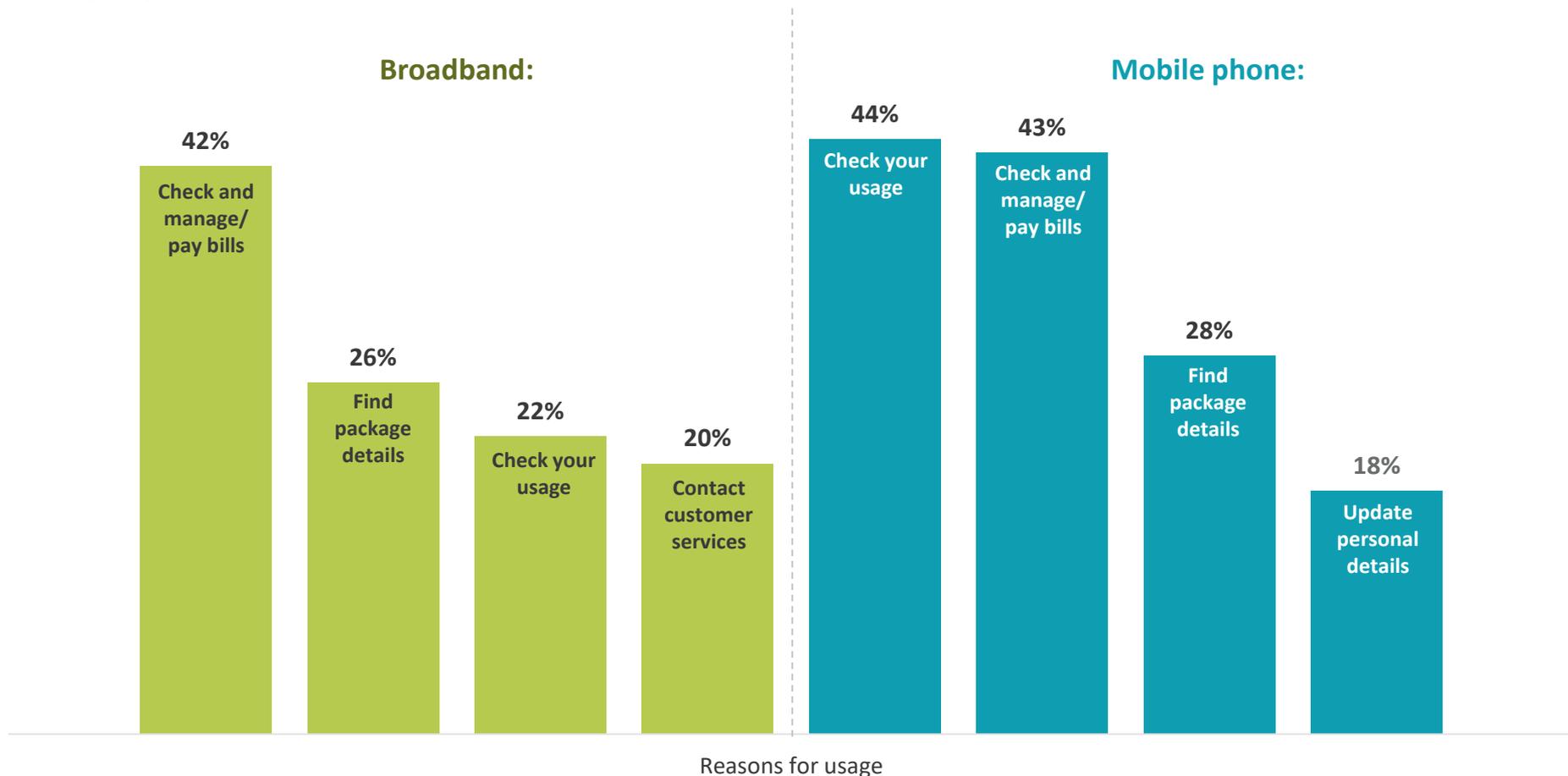
Source: Populus Online Omnibus

Question: B.5.1 Do you do any of the following online, through your provider's website or app?

Base: All respondents who have service (1,542-2,062)

# Individuals are more likely to check their mobile phone usage using their online account than their broadband usage

What people use their online accounts for (communications services)



Reasons for usage

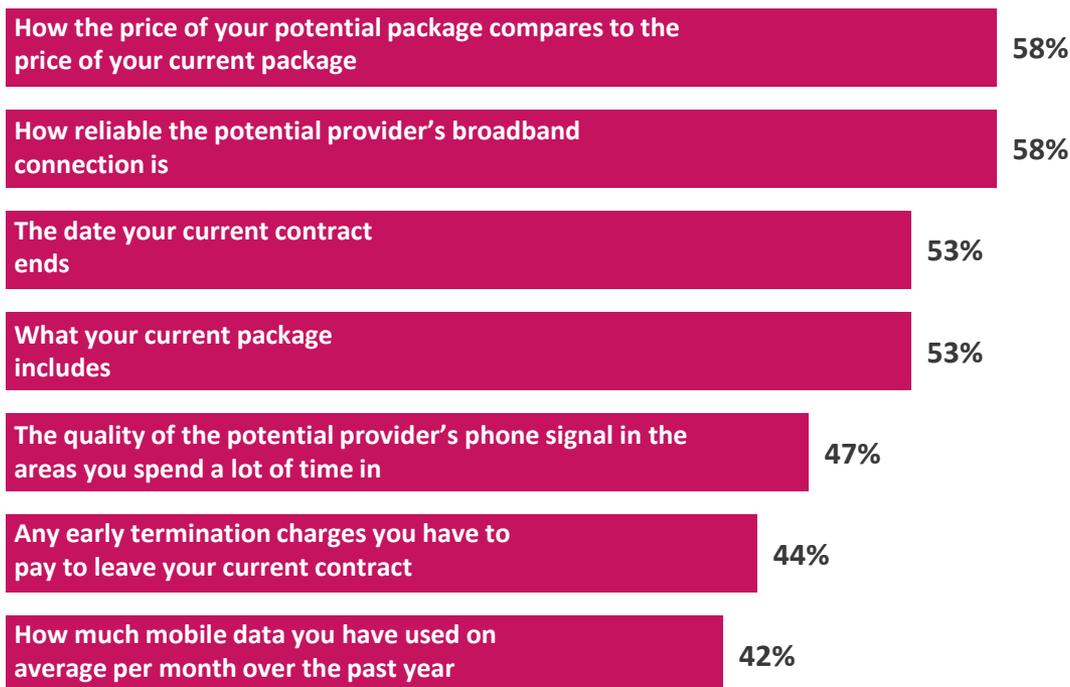
Source: Populus Online Omnibus

Question: B.5.1 Do you do any of the following online, through your provider's website or app?

Base: All respondents who have service (1,542-2,062), mobile phone (2,002), broadband (1,924)

# Price comparison information is also deemed to be the most helpful to have when searching for new deals, alongside broadband reliability

The most helpful information to have readily available when searching for new deals



Those who take multiple services with the same provider are significantly more likely to find a comparison between the current cost and the potential cost helpful when searching for a new deal (dual play 70%, triple play 70%).

Source: Populus Online Omnibus

Question: B.10 Which of the following pieces of information do you think you would find helpful to have readily available to you when searching for a new communications package or provider?

Base: All respondents (2,075)

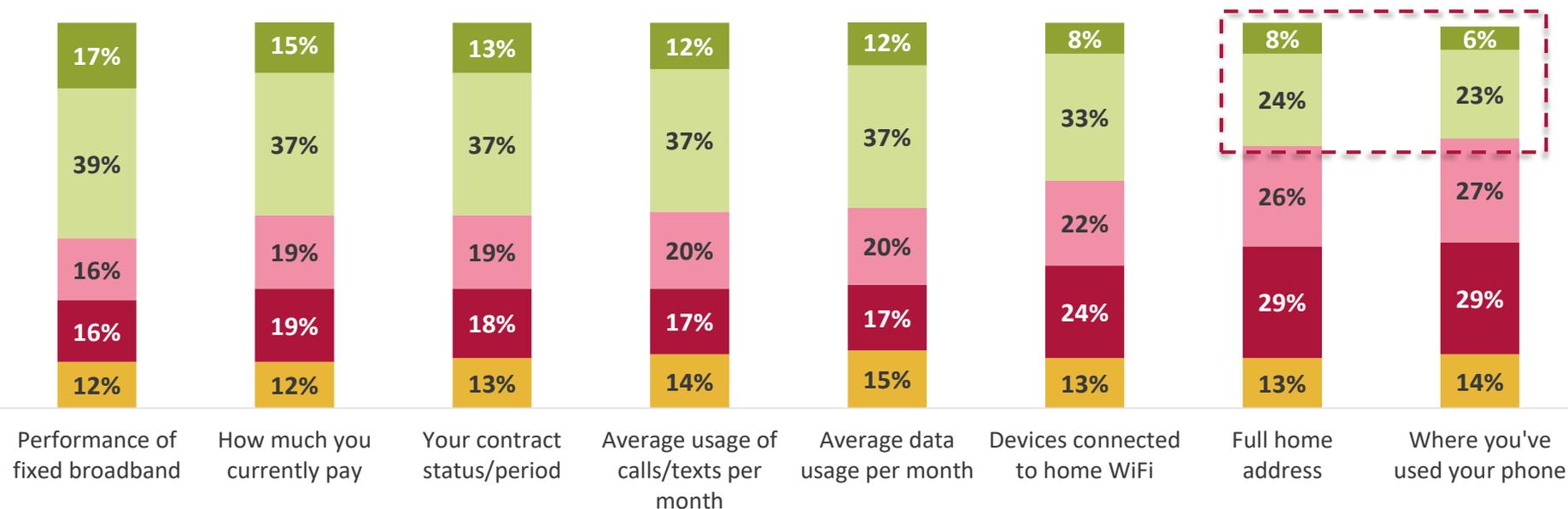
# Section 5

## Data sharing

# More customers say they are willing to share data about their broadband performance, or details of their current contract status and usage, than personal details

## Likelihood to share different types of personal data with third-party services

■ Not applicable/don't know   
 ■ Definitely wouldn't   
 ■ Probably wouldn't   
 ■ Probably would   
 ■ Definitely would



55+ year olds, those who have been with their provider for over 2 years, and those who haven't changed their service in the last 12 months are least likely to say they are willing to share data with third-party services

Source: Populus Online Omnibus

Question: C.1 How likely, if at all would you be to share the following types of data about your broadband or mobile with these types of third-party services (set out above)?

Base: All respondents (2,075)

Those who are looking for a new communications deal are more likely to share their address and location data with third party services than those who aren't

Those who would share their data with third-party services

↑ Significantly higher than the total at 95% confidence



Source: Populus Online Omnibus

Question: C.1 How likely, if at all would you be to share the following types of data about your broadband or mobile with these types of third-party services (set out above)?

Base: All respondents (2,075), and looking for a new deal (211-1,864)