

2009 Consumer Concerns: Methodology

Preface

This volume contains the methodology for the 2009 Consumer Concerns Survey, which has been run by TNS Omnibus on behalf of Ofcom. The core objectives of the study are:

- to understand consumers' concerns regarding their landline, mobile, internet, television and radio services. Concerns related to both content and service issues;
- to monitor the incidence and impact of silent calls and abandoned calls;

TNS Omnibus interviewed a random sample of 3,303 UK adults over 16+. Interviewing took places in three waves in March 2009, June 2009 and September 2009. Tables are provided for each wave.

| | Timing | Unweighted sample |
|---------|--|-------------------|
| Wave 1: | 4 th March to 15 th March 2009 | 1092 16+ adults |
| Wave 2: | 3 rd June to 14 th June 2009 | 1110 16+ adults |
| Wave 3: | 2 nd September to 13 th September 2009 | 1101 16+ adults |

All interviews were conducted by in-home, face to face interviewing using CAPI technology.

Contents:

| | Page |
|--|------|
| 1.1 Research Methodology | 2 |
| 1.2 Quotas | 2 |
| 1.3 Weighting | 2 |
| 2.1 Appendix A – Guide to Statistical Accuracy | 3 |
| 3.1 Appendix B – Questionnaire | 4 |

1.1 Research methodology

The research was run in three waves in March, June and September 2009 on TNS Face-to-Face Capibus. This means that the questions were asked among a range of different questions commissioned by other organisations. To ensure comparability, the questions asked were the same in all waves and the questions were asked at the front of the Capibus.

All adults were asked all questions about concerns relating to telecommunications services, whether or not the service was in use in their household. However, analysis was performed on the base of all adults with access to the service as well as the total population.

The questionnaire first asked about access to fixed line, broadband and TV services, personal access to a mobile and usage of radio. Respondents were then asked if they had any concerns about each of the services. They were then asked about whether they or anyone they knew had experienced, in the last six months, a range of specific issues for each of services. Finally, respondents who had received a “silent” or “abandoned” call or had received an unexpectedly high bill were asked a few questions to quantify the scale and impact of the “silent” and abandoned calls and reasons for the unexpectedly high bill.

Respondents were interviewed in home, using CAPI (computer assisted personal interviewing) pen technology. The TNS CAPI Omnibus employs a random location methodology. 2001 Census small area statistics and the Postal Address File (PAF) were used to define sample points. These are areas of similar population sizes formed by the combination of wards, with the constraint that each point must be contained within a single Government Office Region (GOR). For each wave of TNS CAPI Omnibus, 143 sample points are selected and, within the selected primary sampling points, a postcode sector is chosen. This means that interviews took place in 429 distinct sampling points across all three waves. Within a sampling point, postcode sectors are divided in two equal groups— A and B. To avoid cluster effects, each wave of the TNS Omnibus alternates between postal sectors in groups A and B.

A total of 3,000 interviews (weighted) were conducted. No quotas were set by communication services to be covered, resulting in the following breakdown of interviews conducted and services covered:

| Fixed line | Mobile (personal) | Internet | Radio listeners |
|------------|-------------------|----------|-----------------|
| 2607 | 2543 | 2090 | 2533 |

1.2 Interviewing and Quota Controls

Assignments are conducted over two days of fieldwork and are carried out on weekdays from 2pm– 8pm and at the weekend. Quotas are set by sex (male, female housewife, female non-housewife); within female housewife, presence of children and working status, and within men, working status, to ensure a balanced sample of adults within effective contracted addresses. Interviewers are instructed to leave 3 doors between each successful interview.

1.3 Weighting

Quotas (by sex, working status and presence of children) are set during interviewing to ensure representivity, whilst any sample profile imbalances are corrected at the analysis stage through weighting

2.1 Appendix A - Guide to Statistical Reliability

The variation between the sample results and the “true” values (the findings that would have been obtained if everyone had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times that a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chances are 95 in 100 that the “true” values will fall within a specified range.

However, as with all multi-stage sampling, there are effects on the magnitude of the standard error of estimates that arise from a number of sources. The greatest contributors are caused negatively by the effects of clustering and weighting and positively by the effects of stratification. These are collectively known as ‘design effects’. The ‘design factor’ is used to estimate the ratio of the standard error of these complex sample estimates to that of a simple random sample of the same size. Design factors vary from one variable to another depending on the inter-correlations that exist between that variable and the causes of variation in the size of the standard error. To accommodate these design effects, the confidence has been raised to 99%, that is, the chances are 99 in 100 that the “true” values will fall within a specified range.

The table below illustrates the required ranges for different sample sizes and percentage results at the “99% confidence interval”:

| Approximate sampling tolerances applicable to percentages at or near these levels (+/-) | | | | | |
|--|--------|--------|--------|--------|--------|
| | 10/90% | 20/80% | 30/70% | 60/40% | 50/50% |
| 3,000 (All respondents) | 1.4% | 1.9% | 2.2% | 2.3% | 2.4% |
| 1487 (Males) | 2.0% | 2.7% | 3.1% | 3.3% | 3.3% |
| 2607 (Fixed line single service) | 1.5% | 2.0% | 2.3% | 2.5% | 2.5% |
| 2543 (Mobile service) | 1.5% | 2.0% | 2.3% | 2.5% | 2.5% |
| 2090 (internet services) | 1.7% | 2.3% | 2.6% | 2.8% | 2.8% |
| 2533 (Radio listeners) | 1.5% | 2.1% | 2.4% | 2.5% | 2.6% |

For example, if 30% or 70% of a sample of 3,000 gives a particular answer, the chances are 99 in 100 that the “true” value will fall within the range of ± 2.62 percentage points from the sample results.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be “real”, or it may occur by chance (because not everyone has been interviewed). To test if the difference is a real one – i.e. if it is “statistically significant” – we again have to know the size of the samples, the percentages giving a certain answer and the degree of confidence chosen.

3.1 Appendix B - Questionnaire

Consumer Concerns Questionnaire – Wave 7 – March 2009

Consumer Concerns Questionnaire – Wave 8 – June 2009

Consumer Concerns Questionnaire – Wave 9 – September 2009

TNS Consumer Omnibus

(scripter: randomise order of asking Q.1-Q.4)

Q.1 Do you have a landline telephone in your home?

01: Yes

02: No

(DK)

SHOW SCREEN – MULTICHOICE (codes 01-03 only)

Q.2 Which, if any, of the following types of mobile phone do you personally use?

01: Monthly subscription\contract mobile phone

02: Pre-pay\pay as you go mobile phone

03: Other type of mobile phone

04: Do not personally use a mobile phone

(DK): Don't know

(route: ask Q.2a if Internet at Home coded at quota, others go to Q.3)

SHOW SCREEN – MULTI CHOICE

Q.2a Which, if any, of the following types of internet access do you have at home?

01: Dial up\narrowband internet access

02: Broadband internet access

03: Internet – other connection type

04: Internet service at home but not sure which

(DK): Don't know

SHOW SCREEN – MULTICHOICE (codes 02-07 only) do not invert)

Q.3 Which, if any, of the following types of television does your household receive at the moment?

01: Only terrestrial TV (Channels 1-4\1-5)

02: Cable TV (through Virgin Media (previously NTL\Telewest))

03: Satellite TV (Sky)

04: Satellite TV (Other)

05: Freeview (through a set-top box of digital television set) with ONLY free channels

06: Freeview (through a set-top box of digital television set) with free channels PLUS top-up channels such as Cartoon Network or the Discovery channel

07: Digital TV via a broadband DSL line (from Tiscali TV, Kingston Communications or BT Vision)

08: No TV in household

(DK): Don't know

(route: ask Q.3a if 03 or 04 coded at Q.3, others go to Q.4)

Q.3a Do you use your satellite television service to receive subscription channels or free-to-air services only?

INTERVIEWER: IF NECESSARY ADD

“Do you pay a monthly subscription fee on top of what you paid to have the dish installed?”

01: Receive subscription channels (pay a monthly subscription fee)

02: Free to air services only (no monthly subscription fee)

(DK): Don't know

(route: ask Q.3b if 02 coded at Q.3a, others go to Q.4)

Q.3b And can I just check, do you pay a monthly subscription fee on top of what you paid to have the dish installed?

01: Yes

02: No

SHOW SCREEN (do not invert)

Q.4 During an average week, on how many days do you listen to the radio (including listening at home, in the car, at work, via a mobile phone, television, personal stereo)?

01: 7 days a week

02: 6 days a week

03: 5 days a week

04: 3-4 days a week

05: 1-2 days a week

06: Less often

07: Never\do not listen to the radio

(DK)

(scripter: randomise order of asking Q.5-Q8)

(route: ask Q.5 if 01 coded at Q.1, others see Q.6)

DO NOT SHOW SCREEN FOR NEXT QUESTION

MULTI - CHOICE

Q.5 Can you tell me if you have any worries or concerns about your landline phone service at the moment?

IF YES ASK: What particular worries or concerns do you have?

PROBE: WHAT ELSE?

01: Call charges or rental fees for landline phone being too expensive

03: Nuisance/unwanted cold calls/sales calls

06: Faulty line/bad reception/hear other people on line

02: Other (specify)

(N); No, none

(DK)

(route: ask Q.6 if 01-03 coded at Q.2, others see Q.7)

DO NOT SHOW SCREEN FOR NEXT QUESTION

MULTI - CHOICE

Q.6 Can you tell me if you have any worries or concerns about your mobile phone service at the moment?

IF YES ASK: What particular worries or concerns do you have?

PROBE: WHAT ELSE?

01: Poor\no signal\reception on mobile phone

02: Call charges or rental fees for mobile phone being too expensive

03: Other (specify)

(N): No, none

(DK): Don't know

(route: ask Q.7 if "Internet at home" coded at Quota, others see Q.8)
DO NOT SHOW SCREEN FOR NEXT QUESTION
MULTI CHOICE

Q.7 Can you tell me if you have any worries or concerns about your internet service at the moment?

IF YES: ASK What particular worries or concerns do you have?

PROBE: WHAT ELSE?

- 01: Sex\violence\Adult material on Internet
- 02: Paedophiles on the Internet
- 03: Pornography on the Internet
- 04: Internet security\access to personal information
- 05: High\expensive charges for Internet usage
- 06: Internet not regulated by anyone
- 07: Pop-ups\advertising on the Internet
- 09: Problems switching internet service providers
- 10: Receiving spam\too much spam
- 11: Slow connection
- 12: Viruses
- 13: Not working properly/no connection
- 08: Other (specify)
- (N): No, none
- (DK): Don't know

(route: ask Q.8 if 01-07 coded at Q.3 or 01-06 coded at Q.4 others go to intro before Q.9)
DO NOT SHOW SCREEN FOR NEXT QUESTION
MULTI - CHOICE

Q.8 Can you tell me if you have any worries or concerns about your TV or radio service at the moment?

IF YES ASK: What particular worries or concerns do you have?

PROBE: WHAT ELSE?

- 01: Sex/violence/adult material on TV
- 02: Poor reception on TV
- 03: Poor reception on radio
- 05: Problems with TV phone-ins\quizzes\voting
- 06: Going over to digital\change over
- 07: Too many repeats
- 08: Rubbish/bad/poor quality programmes
- 09: Expensive
- 10: Cost of TV licence
- 04: Other (specify)
- (N): No, none
- (DK): Don't know

I am now going to read out various issues. For each one, please tell me whether it has happened to you personally in the last 6 months or to someone you know, taking your answer from the relevant screens.

(scripter: randomise order of asking Q.9-Q12)

Q.9 So, thinking about these issues related to **landline phones**, please tell me whether they have happened to you personally or to someone you know.

SHOW SCREEN MULTI – CHOICE (codes 01-03 only)

...Being moved to a new landline supplier without agreeing to move

...Receiving silent calls (this means the person answering the call hears silence).

INTERVIEWER: IF NECESSARY ADD "If a recorded message was heard, please do not count this as a silent call"

...Incorrect charges on your landline bill

...Being unable to afford a landline

...Receiving 'abandoned calls with recorded message' – this is where a company's telephone system has tried to call you, but when the call was put through there was no operator available to speak to you. You will have heard a recorded message. Please do not include if the recorded message heard was about a competition.

...Had difficulty paying an unexpectedly high landline bill

01: Personally experienced in the last 6 months

02: Experienced by someone I know in the last 6 months

03: Experience by someone I know but not sure when

04: Neither

(DK): Don't know

(list as Q.9)

Q.10 So, thinking about these issues related to **mobile phones**, please tell me whether they have happened to you personally or to someone you know.

SHOW SCREEN – MULTI CHOICE (codes 01-03 only)

...Children overriding age controls and accessing adult content through mobile phones

...Being misled when taking out a new contract for a mobile phone

...Incorrect charges on your mobile bill

...Trying to get cash back from a mobile cash-back contract but not being able to

...Being given incorrect information about mobile tariffs or coverage by mobile operator/supplier

...Difficulty paying an unexpectedly high mobile bill, for example due to internet charges or calls to numbers you did not know were expensive to call

...Being charged for calls made on your mobile after it was stolen

...Being charged for media content such as ring tones on your mobile but not receiving them

...Receiving 'abandoned calls with recorded message' – this is where a company's telephone system has tried to call you, but when the call was put through there was no operator available to speak to you. You will have heard a recorded message. Please do not include if the recorded message heard was about a competition.

(list as Q.9)

Q.11 So, thinking about these issues related to **the internet**, please tell me whether they have happened to you personally or to someone you know.

SHOW SCREEN – MULTI CHOICE (codes 01-03 only)

- ... Children accessing adult content through internet
- ... Broadband speeds being slower than expected
- ... Being a victim of someone using another person's identity online
- ... Being a victim of people saying upsetting things about others on internet sites
- ... Incorrect charges on your internet bill
- ... Difficulty obtaining a MAC code when trying to switch broadband supplier

(list as Q.9)

Q.12 So, thinking about these issues related to **television and radio**, please tell me whether they have happened to you personally or to someone you know.

SHOW SCREEN – MULTI CHOICE (codes 01-03 only)

- ... Poor radio reception
- ... Offended by language on the radio
- ... Poor reception on TV
- ... Problems with phone ins for television programmes

(list as Q.9)

Q.13 And finally in this section, thinking about these *general* issues, please tell me whether they have happened to you personally or to someone you know

SHOW SCREEN – MULTI CHOICE (codes 01-03 only)

- ... Problems with security/access to personal information
- ... Difficulty resolving an issue with one of your communications service providers/supplier
- ... Being a victim of people making transactions using someone else's bank details

(list as Q.9)

(route: ask Q.14a if 01 coded for "receiving silent calls" at Q.9, others see Q.16)

Q14a You said earlier that you personally have received silent calls on your landline. On average, how many silent calls does your household receive on the landline each month?

(scripter; insert a 2 digit type-in box, don't allow "0")

(DK): Don't know

(route: ask Q.14b if 2+ coded at Q.14a, others skip to Q.14c)

SHOW SCREEN

Q.14b And which of the following best describes how these calls were distributed?

- 01: Most received in one day
- 02: Most received over two to three days
- 03: Spread over a week
- 04: Spread over a couple of weeks
- 05: Spread over the month
- (DK): Don't know

SHOW SCREEN

Q.14c How inconvenienced, or not, do you feel when receiving silent calls?

- 01: Very inconvenienced
- 02: Fairly inconvenienced
- 03: Not very inconvenienced
- 04: Not at all inconvenienced
- (DK): Don't know

SHOW SCREEN

Q.14d And how concerned, if at all, do you feel when receiving these types of calls?

- 01: Very concerned
- 02: Fairly concerned
- 03: Not very concerned
- 04: Not at all concerned
- (DK): Don't know

Q15a Have you ever heard of the Telephone Preference Service – a service you can register with if you do not wish to be called by companies selling or promotion their products or services?

- 01: Yes
- 02: No
- (DK): Don't know

(route: ask Q.15b if 01 coded at Q.15a, others see Q.16)

Q.15b And is your home landline number registered with the Telephone Preference Service?

- 01: Yes
- 02: No
- (DK): Don't know

(route: ask Q.16 if 01 coded for “receiving abandoned calls” at Q.9, others see Q.17)

Q16 You said earlier that you personally have received abandoned calls with a recorded message on your landline. On average, how many abandoned calls with a recorded message does your household receive on the landline each month?

- (scripter; insert a 2 digit type-in box, don't allow “0”)
- (DK): Don't know

(route: ask Q17 if 01 coded for “Had difficulty paying an unexpectedly high landline bill” at Q.9, others close)

SHOW SCREEN – MULTI CHOICE

Q17 You said earlier that you have had difficulty paying an unexpectedly high landline bill in the past 6 months. What was it that caused your bill to be higher than you had expected?

- 01: Calls to 09 numbers/voting lines/chat lines etc
- 02: Calls to 0845/0870 numbers
- 03: Calls to 118 numbers/directory enquiry calls
- 04: Charges for repairs to the service
- 05: Other (specify)
- (DK): Don't know
- (CR): Refused to answer