

Open Communications: Research Findings

August 2020



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1

Introduction

Project Context

Ofcom is considering implementing an open data initiative in the communications market – Open Communications

Ofcom is thinking about how to help customers understand their own communications usage and needs better so that they are able to choose the right landline, broadband, pay TV and mobile packages for them.

One idea to do this is by requiring communications providers (e.g. Sky, O2, Virgin) to share information on their customers' package and use of their services, with accredited third parties.

Third parties could use this information to understand a customer's individual usage/requirements and to provide personal product recommendations based on that customer's actual usage and needs.

The information would only be shared by a customer's provider with their explicit consent - they would give permission for what individual bits of information their provider would share.

Information would be shared securely and the third party would have to meet data protection requirements and be approved by a central body.

The result could be:

- Helping consumers to navigate the market more effectively
- Tailored product recommendations to consumers & small/medium enterprises (SMEs)
- Providing consumers with more information about service quality characteristics relevant to their specific needs
- Helping vulnerable consumers to receive the support they need

Objectives

The two core objectives were:

1. To explore current engagement with communications services and attitudes towards data sharing, including:

- Exploring participants' (ie, consumers and SMEs) **experience of using third party intermediaries** (TPIs e.g. Uswitch, GoCompare, Money SuperMarket) generally and specifically for communications services
 - Motivators / barriers to use for different services
- **Understanding what data is used to find a new / better deal** (i.e. role of product characteristics, whether they share personal data, etc.)
 - How and where (if at all) is personal data sought by providers or TPIs? What is used? Why?
- **Exploring circumstances in which consumers and SMEs are happy to share their data with TPIs**
 - What kinds of data are they comfortable / concerned about sharing? Why?
 - What are their concerns about sharing? (e.g. data used for certain purposes without consent)
 - Expectations of what they get in return (e.g. best price, etc.)
- Exploring **current levels of trust in providers and in TPIs** re: collection of / sharing of personal data
 - What would **improve levels of trust** around use of personal data (e.g. a trust mark)?

2. To understand potential use and perceived benefits and risks of Open Communications services, including:

- **Exploring consumer and SME reactions to the idea of Open Communications enabled services**
 - Appeal, interest and likely engagement
 - Reaction to how it might work, e.g. verifying your identity
- Exploring **perceived benefits and risks of Open Communications**
- Establishing **what features, functions or outcomes would increase the appeal** of Open Communications
- Identifying **what might alleviate concerns about the services and encourage use** of Open Communications services
- Identifying any **differences in levels of interest between consumer segments** using Open Communications and why. Specifically, how **vulnerable customers** might engage with Open Communications enabled services and benefits / barriers for this audience (consumers and SMEs)

Methodology

A three stage qualitative methodology was undertaken to address our objectives:



A 'new deal' diary

- All participants were asked to record how they would **find a new communications service deal** for both dual play / triple play and mobile, in particular:
 - Their routes to researching a new deal
 - Clarity of the information found
 - Sources of information (e.g. websites, telephone, word or mouth, etc.)



Focus groups and in-home depths

- 11x face-to-face focus groups, covering 'engaged' and 'unengaged' audiences across a range of ages and demographic profiles (including a separate pilot group)
- 17x face-to-face depth interviews with vulnerable consumers (including 75+, mental / physical health conditions, financially vulnerable, and low literacy)
- 7x face-to-face depth interviews with SME owners
- Research carried out across London, Bristol, Peterborough, Wrexham, Norwich, Leeds, Belfast, Larne, Edinburgh



Reflective tele-depths

- 14x 15-minute reflective telephone depths with a selection of focus group and depth interview participants whose views on discussion and key themes changed over the duration of the study
- 6x group participants, 3x SMEs, 5x vulnerable consumers

Sample - Face-to-face session samples



11x 2-hour focus groups (6 – 8 participants per session)

AUDIENCE	TOTAL	TRIPLE PLAY + MOBILE	DUAL PLAY + MOBILE
Engaged/Active, Under 40	2	1	1
Apprehensive, Under 40	2	1	1
Engaged/Active, Over 40	2	1	1
Apprehensive, Over 40	2	1	1
Unmotivated, mix of ages	2	1	1
Pilot session, unengaged, aged 30-64 (London)	1	1	-
TOTAL GROUPS	11	6	5

- 8 groups x primarily communications services focused; 3 groups x primarily mobile focused
- All were decision-makers, with access to internet at home, and didn't totally reject switching providers
- Mix of tech confidence / engagement & mix of attitudes to data sharing
- Pilot session – broad mix of ages, focus on unengaged
- Engaged / active groups - at least 2 looking at a new deal in next 2 months. Even mix ½ active; ½ browser / dormant per session
- Mix of broader demographics – gender, lifestyle, household make-up, SEG
- Mix of providers, satisfaction with providers and mix of mobile set-ups to reflect incident rates (contract / PAYG / sim only); for mobile focused sessions - contract customers (handset and sim only)



24x 1-hour in-home sessions

AUDIENCE	TOTAL
75+	4
Financially vulnerable	4
Low literacy	3
Physical difficulties	3
Mental health condition	3
SMEs	7
TOTAL DEPTH INTERVIEWS	24

- 16 depths x primarily communications services focused; 8 depths x primarily mobile focused
- Financially Vulnerable & Other Vulnerable/ 75+ - mix of engaged and unengaged mindsets (and include PAYG/sim only mobile customers), and mix of triple play/dual play
- Financially vulnerable - anyone with an annual income of under £10,500, or earning £10,500-£15,599 annually with 3 or more people in the household, or earning £15,600-£26,000 with 4 or more people in the household
- Low literacy - Don't have any qualifications in English (GCSE or O-Level) and either struggle to read written communication and/or sometimes find forms confusing and difficult to complete
- SMEs - all dual play + mobile, having business contracts for comms, all SME owners (mix of sectors) with no more than 20 employees, all to be decision makers for comms service, mix of switching behaviours

2

Executive Summary

Executive Summary (1/4)

Context: searching for a deal

- The process was often easier than expected due to ability to find an alternative deal, but unengaged consumers lack confidence to follow through. More support was needed to help them understand what they have, what they need and to cut through the options.
- Unengaged customers' decision not to engage was often driven by perception rather than experience; those satisfied with their deal had no trigger to look for a new deal and therefore overcoming inertia was a challenge.
- Engaged customers often split into two types – those confident in their own requirements and comfortable proactively scouring the market and those confident but who needed a trigger to engage (i.e. more reactive).
- Six key pain points affected people and deterred engagement: feeling they had too much choice; not understanding what they have or need; not being able to compare like for like information; the time required; concern that the price displayed is not the price they would pay; and the fear of the unknown. Addressing these pain points was key to better engagement with the market.
- Price comparison websites (PCWs) were widely used across sectors and made decision making easier, but there were some concerns about the trustworthiness of these websites due to the perception that deals were commission led and the widespread experience of onward data sharing (i.e. marketing and call 'bombardment'). Despite these concerns, PCWs were the starting point for most when searching currently, although most participants were not typically using the Ofcom accredited options.
- For those more apprehensive about changing deal/supplier, there was also a need for a solution which alleviated concerns about the actual switching process.

Executive Summary (2/4)

Reaction to the Open Communications concept

- **Overall, the Open Communications concept had quite high appeal and tackled a number of key pain points in the current ways of searching for a deal** (e.g. better ways of getting a deal suited to your needs and helping people better understand what they need). Once the concept had been ‘demonstrated’ and brought to life with mock up visual stimulus of what the concept might look like, the ease and speed of the process increased its appeal.
- **The concept also tackled some of the reasons why consumers and SMEs do not currently engage with the market**, with it being easy to get recommendations (i.e. not time consuming), taking away the need to obtain and understand usage / requirements, and providing a reminder to engage (e.g. via an Account Manager). However, it may not overcome unengaged customers’ inertia unless a trigger to switch and switching concerns are addressed.
- **Some obstacles to using Open Communications will need consideration going forward** (e.g. different levels of comfort with data sharing, mistrust of TPIs, lack of understanding of benefits of sharing data points, ability for advanced filters (such as by provider or phone handset), suitability for tech-averse customers).
- **One off data sharing was preferred by those more nervous about sharing data**, as it facilitated in-the-moment personalised deal suggestions without leaving the channels of data sharing open.
- **Ongoing data sharing was favoured as a means to update usage data continually and to prompt users into action rather than require the customer to engage first**. SMEs also found data sharing useful to help cut through the complexity of the options shown. But there were concerns about being open to security breaches and questions around the ability to revoke permission and who they would be sharing data with.

Executive Summary (3/4)

Reaction to the Open Communications concept (Cont.)

- **Ofcom could play an important role to provide reassurance.** However approval from Ofcom does not necessarily reassure that it can control what providers / TPIs do and the outcomes of using these providers (i.e. data leaks / customer service issues may still occur). Some commonly used PCWs are not members of Ofcom's existing accreditation scheme and participants did not generally use those that are part of the accreditation scheme.

Reaction to Account Manager and Account Aggregator Use Cases

- **Account Manager & Account Aggregator were seen as secondary benefits** – useful tools for organising / raising awareness of deals, but 'everyday relevance' will be the challenge for them to stay relevant, used and top of mind (e.g. having interactive functions). The Aggregator dashboard showing key metrics for your service makes the benefits of ongoing data sharing come to life (e.g. ability to show changes in spend).
- **Account Aggregator made sense of the benefits of ongoing data sharing (ongoing up to date data);** thus data sharing concerns eased once the overall concept was understood, although for some the ongoing sharing still felt intrusive. It was only on reflection that some consumers noted that they already shared this information with suppliers anyway.

Executive Summary (4/4)

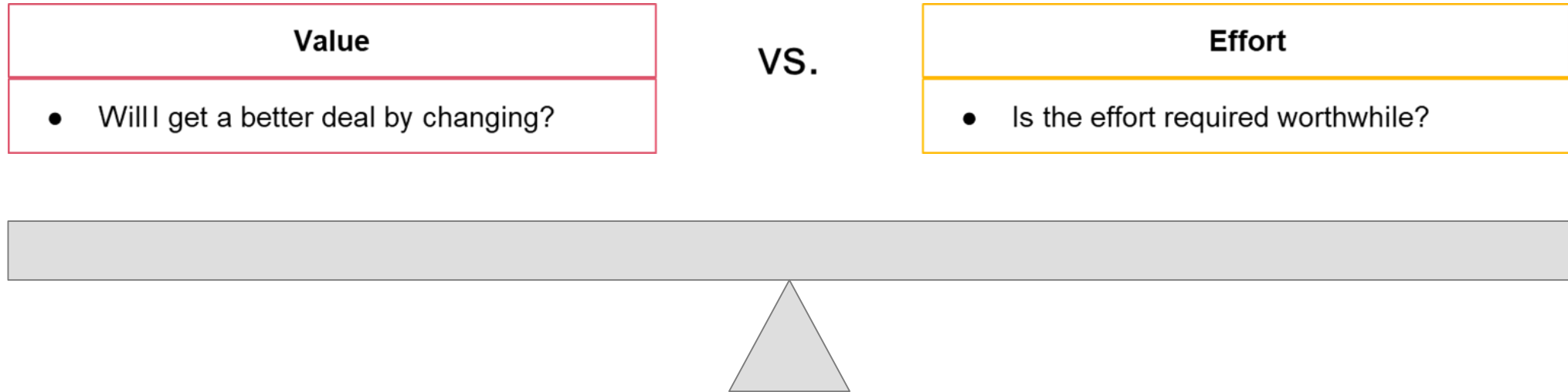
Reassurances and encouraging usage

- To maximise take-up, messaging around Open Communications needs to work on reassuring consumers at various points during the process:
 - **‘Encourage me to look for a new deal’** - by communicating value, ease of engaging and the simplicity of end-to-end process (i.e. tackle the inertia of the unengaged)
 - **‘Encourage me to use Open Communications’** - by reassuring me on its motivation / benefit to me, use of data being shared / guard against junk marketing. To encourage usage and to get these messages across, reassurances and positive endorsements will have to come from trusted advocates (e.g. Martin Lewis, Which?, etc.)
 - **‘Encourage me to continue using Open Communications’** – by making sure the functionality and filters match up to consumer needs, and that reassurances are fulfilled (e.g. no junk marketing / data sold on / that it benefits the consumer).

3

Context: Current
Behaviours

Customers tend to consider the value and effort when considering whether to engage in the market



- **Engaged customers** - The value of engaging was reinforced by their ability to get a better deal by doing so. Perceived effort was also much lower among those who regularly engaged in the market, as they became familiar with the process. N.B. not all of those engaging switch to other suppliers - some simply check if existing deal was competitive or negotiate with existing provider
- **Unengaged customers** - Often saw little value in engaging as satisfied with existing providers and / or feel all providers are very similar. Lack of familiarity with the process of engaging in the market means doing so was often perceived to be relatively high effort, and moving to a new deal or supplier was seen as potentially being a risk

Two types of 'engaged' consumer emerged, with differing triggers and frequency of engagement with comms services

Proactive Engaged

- **Behaviours**
 - Confident of their own requirements (e.g. using speed checkers)
 - Comfortable scouring the market for better deals
 - Habitual deal hunters (and happy to negotiate with providers)
- **Triggers to engage - tends to be habitual**
 - Reached the end of their contract
 - Looking for better value - some always on the lookout / negotiating with providers for better value deals (e.g. higher broadband speeds, more comprehensive package, customer incentives)

"I like to keep my bills down & will say I am leaving (when I'm not) to find the best deals from the retention department"
Female, >40, Engaged, Dual Play, Leeds, Physical health condition

Reactive Engaged

- **Behaviours**
 - Confident about searching, and are generally aware of their own requirements and usage
 - Often need a push before engaging / acting in the market
- **Triggers to engage - tends to be a push factor**
 - Word of mouth from friends and family
 - Poor experiences with existing provider (e.g. unreliable broadband, poor customer service)
 - Sometimes already out of contract
 - Providers contact them directly (especially with SMEs)

"I usually speak to my son about what deals are out there. Then I'd contact Sky to try and get a better deal, or go onto Money Saving Expert to compare deals"
Female, >40, Engaged, Triple Play, Wrexham

Unengaged audiences' behaviours and barriers split by whether they are 'unmotivated' or 'apprehensive'

Unmotivated Unengaged

- **Behaviours**
 - Largely satisfied with current provider
 - Less bothered about engaging in the market
 - "If it ain't broke, don't fix it" attitude
- **Barriers to engagement**
 - Perceived effort ('value' isn't high enough)
 - Do not act on end of contract triggers / notifications
 - Low cost of existing packages relative to other household bills (especially for dual play and some mobile plans)
 - Concerns around the switch process (e.g. concerned about losing connectivity)

"I'm fairly happy with my current provider and the bill isn't too high so I've not really bothered to do anything about it."

Male, <40, Unengaged, Triple Play, Leeds

Apprehensive Unengaged

- **Behaviours**
 - Lack of awareness of their own needs and requirements (e.g. usage, speeds)
 - Lack confidence in decision-making - much more reliant on friends / family to make a decision for them
- **Barriers to engagement**
 - Worried about 'overwhelming' process (e.g. too much information, wouldn't know how to identify the 'best' deal)
 - 'Fear of the unknown' when it comes to switching (with many often wedded to their providers))

"I would definitely get family to come into a shop with me as I wasn't very confident with the online process."

Female, 30-64, Unengaged, Dual Play, Belfast

Engaged consumers generally have a better sense of their requirements, giving them the confidence to get the best deals

Search process

Search outcome

Proactive:

- Search price comparison websites (PCWs), check **provider mobile app** for mobile usage, provider websites, **look at speed checkers**, call provider directly, discount websites (e.g. topcashback, Quidco). **Know how to get the best value deals**
- **Use multiple PCWs** (despite some distrust and marketing concerns) to assess the best deal and **use findings as leverage** in negotiations with their own provider

“Checked existing offers, checked other market leader websites, used Uswitch, used topcashback website, looked at NowTV website and reviews, checked Trustpilot”

Female, <40, Engaged, Triple Play, Norfolk

Reactive:

- Consult similar sources, but generally carried out a **less intensive search process**, e.g. single PCW or direct with existing or new provider
- Trusted **sources / people / recommendations** (e.g. Martin Lewis) influential here

“I’d look on MoneySuperMarket, watch Martin Lewis on TV and see if he has any information on the deals I’m after”

Male, >40, Engaged, Triple Play, Wrexham

- All Engaged audiences were **confident that they had found the best deal** for them (either their existing package or a cheaper alternative)
- **Comfortable in sifting** through large amounts of provider / deal information, and were **confident in the switching process itself** (including calling providers to negotiate where necessary)

“I am unsure of how to make the search for a new deal easier. Companies need more clients, so they always make this particular info easy to find”

Male, <40, Engaged, Triple Play, Norfolk

- Some felt the process was **too time consuming** (particularly for Triple play)

Unengaged audiences lack confidence, and need additional reassurance to encourage them to engage

Search process

Search outcome

Unmotivated

- Find the search process relatively straightforward in terms of retrieving information from PCWs and provider websites
- **Much less fond of the haggling process**, likely acting as a barrier to engagement with the market

Apprehensive

- Many actually found searching **easier than expected**
- **PCWs in particular** help to combat initial fears around information overload and having to search through multiple sources
- However with a lack of understanding of their own needs / usage some **struggled with technical language and understanding what deal they need** (e.g. broadband speeds, mobile phone data and capacity), especially those with **low literacy** and some with **physical health conditions**

“Found it quite easy to look for a new deal online, however it sometimes involves haggling with Virgin Media on the phone which I do not enjoy”

Male, <40, Unengaged, Triple Play, Leeds

“Shorter than expected! Found one place to go instead of looking through loads of individual sites”

Female, <40, Unengaged, Dual Play, Belfast

- Despite some surprise about the ease of retrieving information, **many still lacked confidence** in actually selecting the best deal
- Would still be **reliant on family / friends** (especially **75+** who often use family as a proxy) **and speaking to providers** in person to reassure them
- Overall, **much less confident than Engaged audiences** in having found the right deal for them

“Would definitely get family to come into a shop with me as I wasn't very confident with the online process”

Female, <40, Unengaged, Dual Play, Belfast

Consumers took similar approaches to searching the market across services, but confidence decreased when faced with more complexity

Consumer **considerations and priorities** vary depending on the communications service:

Fixed Comms (i.e. landline, broadband, pay TV)

- **Dual play** - Price, broadband speed, with landline dependency more pronounced **amongst 75+**
- **Triple play** - Add ons (sport / movies / kids package), broadband speed
- **All** - brand a consideration for some (seen as a proxy for better customer service / speed) and WiFi signal reliability (especially in rural areas)

Mobile

- **All** - price, data allowance, coverage reliability
- **Contract** - choice around handsets
- **Sim only / PAYG** considerations - low cost sim deals

"I am happy with my £9.50 a month sim only deal, and I think it will be hard to find something better"
Male, >40, Unengaged, Dual Play, Norfolk

Participants adopted similar approaches to searching for different comms service (e.g. use of PCWs), but confidence varied:

Fixed Comms (i.e. landline, broadband, pay TV)

- **Dual play** - straightforward (few features to consider, relatively little price differentiation) but do not always know or understand speeds
- **Triple play** - difficult to compare like for like with different packages and add-ons. Multiple considerations and household may have different priorities (ie, importance of channels may vary)

Mobile

- **Contract** - handset considerations added extra layer of complexity (as well as number of providers / type of deal), making choice more difficult
- **Sim only / PAYG** considerations - low cost deals restricted search parameters - didn't want to end up paying more. Still high degree of choice in terms of types of deal and number of providers

SME needs are complex and varied, but provider reputation and customer service are common requirements for them

Common **key considerations** before engaging in the market:

- Like residential consumers, SMEs prioritise **price**, and strong and reliable **WiFi signal**
- ‘Softer’ aspects more important to SMEs, e.g. **account management facilities / good customer service**
- Some **engage following sales calls from providers** - this resulted in a poor experience for one SME respondent (promised good WiFi signal, but disappointing reality)

“I’ll go with a reputable company with the guarantee of quality broadband and phone lines”

Female, SME, >40,
Moderately Engaged, Dual
Play, Bristol

Difficulties around engaging in the market:

- **Business comms is a more fragmented market than residential**, with lots of ‘unknown’ providers
- **SMEs display relatively strong brand loyalty** if experiences are positive, and are more unwilling to switch for fear of losing coverage (particularly in rural areas)
- Some are on **residential / personal mobile contracts for business use**, making it more difficult to compare or know if it is beneficial to switch to business.

Experience of searching

- Tend to **follow same processes** (straight to online, PCWs) for both business broadband and mobile deals searching - although not always done currently as providers come to them and offer them deals
- Looking for a **one-stop shop** where they can compare broadband, landline, mobile easily side by side
- Difficulties cited around **offers not splitting out** separate quotes for broadband and landline
- Some found it **harder to get mobile deals that are cost effective** for business, and found that personal mobile deals are much cheaper

“Was much longer than I thought because most companies were unable to quote for both broadband and landline”

Male, SME, >40, Moderately Engaged, Dual Play,
Norfolk

SMEs have a similar searching process, but struggle to find deals tailored to their business needs

Search process

Search outcome

Moderately engaged

- Reactive in seeking the best deals, more likely to be sold on deals provided by **smaller providers** (e.g. XLN, KINEX) compared with those highly engaged (e.g. BT, TalkTalk)
- Some **struggled with understanding and finding deals that meet their specific business needs** (e.g. for both broadband and landline.)
- Those without business set-ups also find it difficult to compare with their current deal.

“I first found the phone I wanted, then looked on Compare the Market. iPhone 11 Pro Max.”

SME, Moderately engaged,
Dual Play, Bristol

Highly engaged

- More confident in searching for and haggling new deals, a couple mentioned consulting with **existing providers**
- **Metrics** some found helpful were using one existing provider’s deal as a **benchmark to assess** other competitors offers and going through **customer reviews**

“If one existing provider proactively offered their most competitive deal, this could then be used as the benchmark to assess the competitors by in terms of speed and price etc.”

SME, Highly engaged, Dual Play, London

- Most use **online searches** and **PCWs** to help get some initial thoughts about current deals on the market.
- Would look at **other businesses in the area** for reference or go through **customer reviews** when it comes to final decision.
- Despite some surprise about the ease of retrieving information, **many still found selecting the best deal challenging**, either no tailored deals or deals being pricy
- Overall, much more concerned about telecoms services quality and reliability from a **business contingency** perspective

“Our head of finance will look at local businesses in the first instance. Secondly we will go onto a comparison site.”

SME, Moderately Engaged, Dual Play,
Norwich

Despite their widespread usage, consumers have reservations about trusting third party intermediaries (TPIs)

TPIs were used by nearly all as part of their search, but some concerns persisted around them. These concerns would not necessarily stop them using these sites, but any future Open Communications solution would need to navigate more negative perceptions of these sites.

Sponsored links and paid promotions can make it seem like users are never getting the best deal for them

“I’m looking for a website similar to Uswitch, but that has mobile coverage checker, and no way for the company to use paid promotions”
Male, <40, Engaged, Triple Play, Norfolk

“I think there should be regulated pricing and an independent comparison site would help”
Male, >40, Unengaged, Dual Play, Norfolk

Perception that TPIs sell personal data, making some wary when sharing it is required

“I did not expect the need for personal information on some of the comparison sites”
Male, >40, Engaged, Triple Play, Wrexham

“I generally wouldn't trust third parties. I would not like to reveal my information to them”
Female, 30-64, Unengaged, Triple Play, London

Participants did not like the prospect of follow up marketing and nuisance calls after signing up or running a search

“Online is a simple tool, live chat available if get stuck. I don’t leave my number as I don’t want to be bombarded with calls”
Female, <40, Engaged, Triple Play, Norfolk

“I’m concerned with how many third parties get my information. Negatives are getting constant emails and calls”
Female, >40, Unengaged, Triple Play, Edinburgh

Finding alternative deals was not problematic, but there was little confidence in it being the right deal for them. Six pain points emerged

Too much choice

- Too many providers, PCWs, deals (e.g. mobile different prices for same package when offered through TPI)

Don't know what they have or need

- 'Optimum' broadband speeds - is this now and for the future?
- Mobile data and usage
- Online results confusing / language too technical, especially for some

low literacy

Unengaged



More prominent

Not comparing like for like data

- Triple vs Dual play, value of 'add ons' (especially if buying separately already)
- Handset choice impacts on mobile deals

Engaged



More prominent

Time it takes

- No 'quick fix' - need to explore number of TPIs and provider offers if genuinely looking for the best deal (particularly for Engaged)
- Need to negotiate with provider
- Obtaining information on my usage

Price quoted doesn't reflect final cost

- Add ons, trade ups / downs, introductory offers...it's never the initial headline price
- Prices vary massively between providers for a similar package

Engaged



More prominent

Fear of changing provider

- Fear of changing provider and receiving a poorer service, unexpected problems, hidden costs, etc.

Unengaged



More prominent

For Unengaged consumers, these pain points can reinforce the perception that it is not worth engaging in the market

Pain points were identified by both engaged and unengaged customers and across package types

Too much choice

“Found the process a bit more difficult in finding the right package for the right price as there are so many options to pick from”

Female, 30-64, Unengaged, Triple Play, Belfast

Don't know what they have or need

“Easy to do the comparison but hard to know what's best unless you know what your usage is”

Female, <40, Engaged, Dual Play, Wrexham, Low literacy

Not comparing like for like data

“Comparing apples to oranges between different providers. A saving on one service can be countered by another (i.e. cheap broadband but expensive TV package)”

Female, <40, Unengaged, Triple Play, Leeds

Time it takes

“Very long winded looking at the different pros and cons from each package. You need to be quite tech savvy, need to compare minutes packages for phones”

Female, <40, Engaged, Triple Play, Norfolk

Price quoted doesn't reflect final cost

“If websites made the deals clearer to what you get and what you paid for. Sometimes price jumps up after months”

Female, 30-64, Unengaged, Triple Play, Belfast

Fear of changing provider

“It's the best deal for me with BT. I know I could get cheaper elsewhere but don't want to compromise on speed or quality”

Male, <40, Unengaged, Triple Play, Leeds

Key implications for Open Communications

Unengaged customers' decision not to engage often driven by perception rather than experience

- They tend to stick with the status quo as they're satisfied with their existing deal, and there's no trigger for them to switch
- For some low cost of existing packages relative to other household bills means that there are limited benefits for switching too
- Prising more satisfied consumers away from current package presents an additional hurdle (e.g. don't think they can get the same deal elsewhere, lack of motivation to switch, don't know what they should be switching to)
- For those more apprehensive, they also need a solution which alleviates their concerns about the actual switching process

Finding alternative deals was not problematic, however there was little confidence in finding the right deal for them

- Unengaged need more support in knowing what they have and what they need
- Something is needed to cut through plethora of choice to offer a simple solution

6 key pain points were identified in the existing process, which deters engagement

- Fear of the unknown; don't know what they have or need; too much choice; perception that the price isn't the price; time consuming; not comparing like for like data - pain points affect all audience types in some way, with a solution needed to address them

PCWs are widely used among respondents and make life easier, but there are some concerns about whether they can be trusted

- Most use them and see the value, but worry about impartiality and personal data handling - they want a site which saves them time and which they can trust, especially when prices don't appear to be set (e.g. can have different prices on different sites and add ons can soon increase the original price)

4

Initial Reactions
towards Open
Communications

Overall reaction to the Open Communications concept was largely positive due to its perceived ability to simplify engagement

The Introduction

Ofcom is thinking about how to help customers understand their own communications usage and needs better so that they are able to choose the right landline, broadband, pay TV and mobile packages for them.

One idea to do this is by requiring communications providers (e.g. Sky, O2, Virgin) to share information on their customers' package and use of their services, with accredited third parties.

Third parties could use this information to understand a customer's individual usage/requirements and to provide personal product recommendations based on that customers actual usage and needs.

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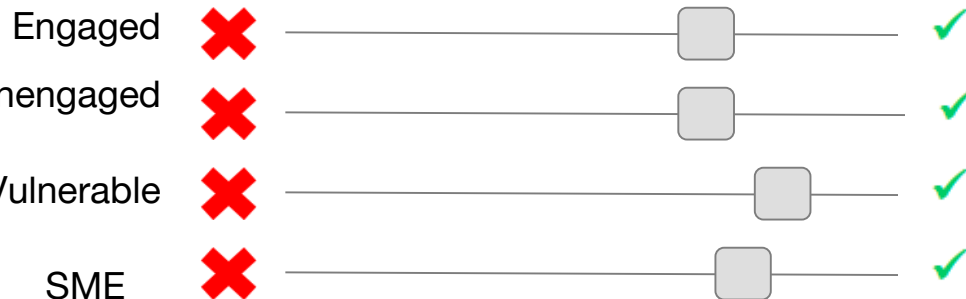
Information would be shared securely and the third party would have to meet data protection requirements and be approved by a central body

The Open Communications concept largely had a mid-high appeal score from the outset

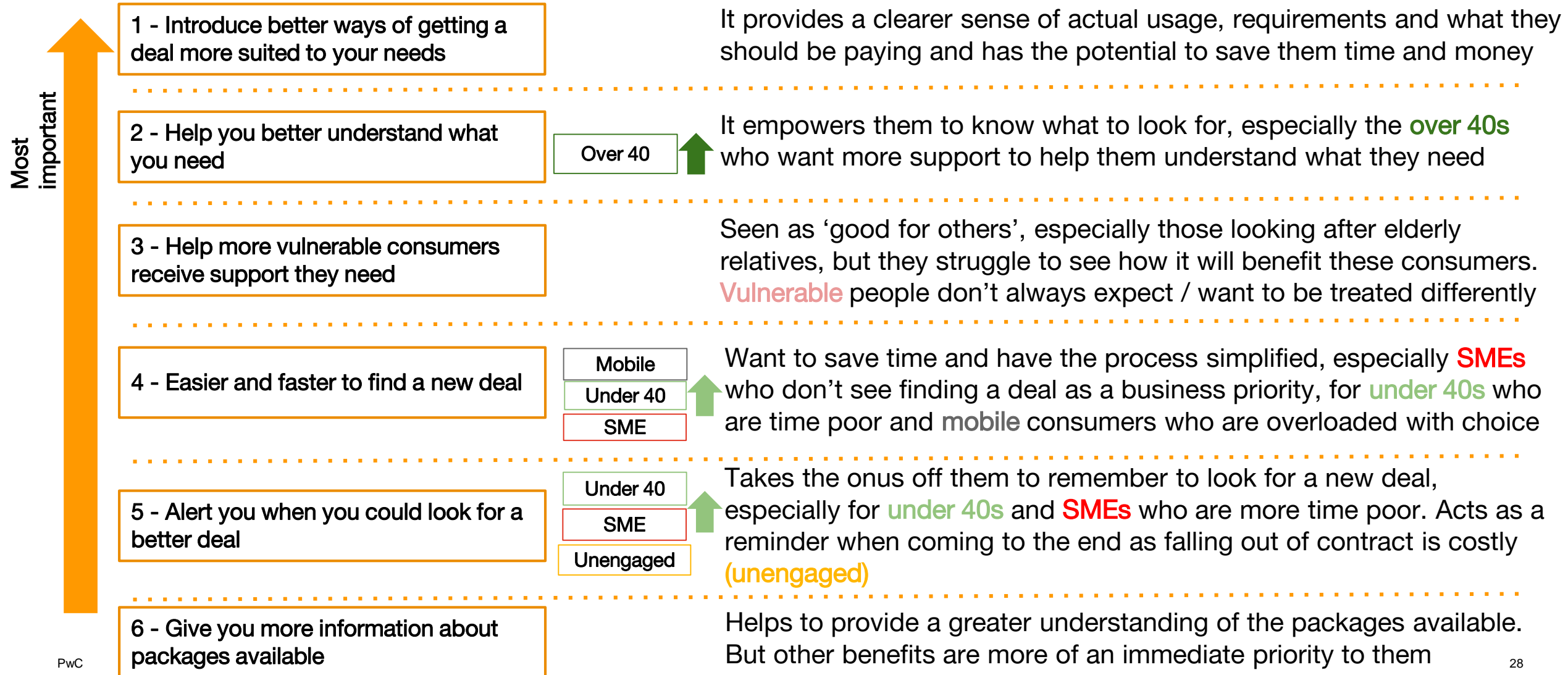
- **Mid-high appeal:**
 - A simple and easy process
 - Providing accurate and suitable deals
 - A 'one stop shop' approach
 - The potential to save them time (especially for the **Financially vulnerable** and **Engaged** audiences)
 - It cuts through the plethora of choice
 - It takes away the uncertainty of knowing what you need
- Those more cautious had concerns around data sharing / security, third party involvement and potential marketing bombardment
- **Vulnerable** audiences had slightly higher appeal scores due to less variance in reactions across the low sample size
- **SMEs** had high overall appeal as they liked the prospect of saving time given searching for a communication deal was not a business priority

"Brilliant idea. I'm not totally aware of what I use, so it's great to see this. I feel I can trust these deals because I trust Ofcom"

Female, >40, Unengaged, Triple Play, Edinburgh, Mental Health Condition



When prompted, the top benefits were those that were felt to directly help consumers get a deal based on their needs & usage



For some, the concept had immediate strong appeal

Case Study 1: Male, <40, Unengaged, Triple Play, Norfolk, Mental Health Condition

Background: He worked part time at a local retailer, and had long-term medication for anxiety and depression. He lived with his wife and daughter

Set up: Long term Virgin Media customer for broadband, landline and TV (triple play). Virgin Media was seen as the fastest broadband provider in the area. His mobile was PAYG and he only used it at home and for work (in WiFi areas). His landline was much more heavily used, but he had a good friends & family package that kept costs down

Appeal of Open Comms: “10 out of 10 for me!”

Benefits: Transparency, clarity about his current deal and what could be an alternative. But he needed to know he could filter on providers as he knew who had a better / worse reputation for service reliability

“ Do I need the level of high speed broadband I have? I don't know. I know what I have, but is it what I need? And I don't really like dealing with companies due to my anxiety. This would arm me with what I need to know ”

Case Study 2: Female, >40, Triple Play, Unengaged, Edinburgh

Background: Currently unemployed, an ex student living accommodation manager living at home alone

Set up: Currently with BT for broadband, landline and TV and EE for her mobile. Has been with both for a couple years now. She feels she can trust the service she gets from a big brand like BT, and EE has the best coverage she has had in her area, but knows she could get a cheaper deal somewhere else

Appeal of Open Comms: 10 out of 10

Benefits: She feels like she could ensure she is getting the best and most suited deal. Everything is clear, straightforward and visual to make it very easy to understand. However, she does feel she would need to be reassured that all the data is secure

“ Seems amazing that Ofcom have not done this previously. Like a comms census collecting information could give a much better idea of what people generally want ”

Initial concerns about the concept were largely around trust and data sharing

- There was a **lack of trust** of TPIs due to negative past experiences, although most were using the popular, well-advised, non-accredited TPIs
 - There was a fear of being bombarded with marketing material
 - Along with concerns about the most suitable deals being driven by commission
 - They were unsure if it would definitely be the best deal for them
 - Can Ofcom really control TPIs? Will it make the process transparent, and guard against nuisance marketing and calls?
 - **Mental health condition audiences:** There were concerns around their personal data being sold to other companies
 - **Financially vulnerable / mental health conditions audiences:** They had specific concerns around cold calling (particularly those with anxiety and / or depression)
- **Data breaches** - especially for those that have experienced them in the past. What can Ofcom do to prevent this?
- **Terminology** would need to be “less technical and more layman” to ensure that it is user friendly (especially for those with **low literacy**)
- Also there was some initial confusion about **who is offering the concept** - was this government run or would TPIs offer the deals?

"It's all relevant to you and your needs or usage. Less hassle and work for me. I get offers shown to me rather than me having to search and seek them out. The deals will be easy to compare as it's all the same information. My concerns are is it secure? Will information be sold on? It's very appealing though as it addresses all my frustrations."

Female, +75, Engaged, Triple Play, Peterborough

"Third parties on commission is a negative for me. And why do I need to share my personal data?"

Male, >40, Unengaged, Dual Play, Norfolk

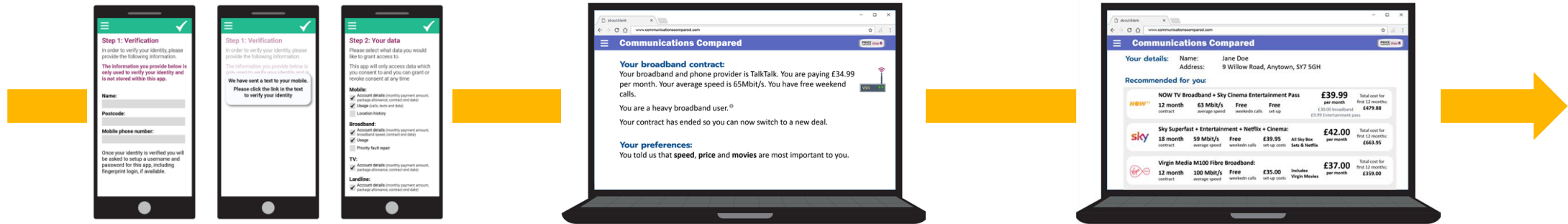
"It would save time, but I'm concerned with how many third parties get the information. I don't want to be getting constant emails and calls"

Female, >40, Unengaged, Triple Play, Edinburgh

5

Detailed reactions towards
Open Communications

Bringing the concept to life and providing additional detail improved appeal and addressed some initial concerns



- Expectations of the 'process' prior to the visualisation were similar to a PCW; that they would have to complete a form over 3-4 screens
- Visualisation of the Open Communications concept helped improve its appeal and scores typically improved after showing the Open Comms 'journey'
- The process highlighted the speed and ease of getting potential deals
- It also addressed some of the initial concerns around data sharing, by clarifying exactly why the data was needed (i.e. the benefits of sharing)
- Although, the tech-based solution had the potential to make a few feel excluded (typically more **vulnerable audiences**, such as older, low literacy)

"Just seems so much more straightforward than I'd imagined"
Female, 30-64, Unengaged, Triple Play, Belfast

"Much like Price Comparison Sites now, but even less effort. What's not to like?"
Male, <40, Engaged, Triple Play, Norfolk

The illustrative authentication process was seen as straightforward, quick and effective than they had expected

- A familiar journey, which instills confidence in the process
- A simple and quick process with only a few steps, making it feel effortless
- Some feel more comfortable providing an email address instead of a mobile number

Step 1: Verification
In order to verify your identity, please provide the following information.

The information you provide below is only used to verify your identity and is not stored within this app.

Name:

Postcode:

Mobile phone number:

Once your identity is verified you will be asked to setup a username and password for this app, including fingerprint login, if available.

Step 1: Verification
In order to verify your identity, please provide the following information.

The information you provide below is only used to verify your identity and is not stored within this app.

We have sent a text to your mobile.
Please click the link in the text to verify your identity

Step 2: Your data
Please select what data you would like to grant access to.

This app will only access data which you consent to and you can grant or revoke consent at any time

Mobile:

- ☒ Account details (monthly payment amount, package allowance, contract end date)
- ☒ Usage (calls, texts and data)
- ☐ Location history

Broadband:

- ☒ Account details (monthly payment amount, broadband speed, contract end date)
- ☒ Usage
- ☐ Priority fault repair

TV:

- ☒ Account details (monthly payment amount, package allowance, contract end date)

Landline:

- ☒ Account details (monthly payment amount, package allowance, contract end date)

A few questions were raised around sharing their data...

- More clarification was needed on how data sharing would help them get a better deal
- In particular, the benefit of sharing their 'location history' to them finding the best deal
- They were unsure what 'Priority fault repair' refers to
- And unsure if data points would be ticked to give consent or unticked if unwilling to share. There was a preference for the latter

"I see this with most companies, which I like. It seems quick"
Male, <40, Engaged, Triple Play, Norfolk

"You seem to be giving away a lot of information"
Female, 30-64, Unengaged, Dual Play, Wrexham

When explored further, there were some concerns around sharing more personal data points due to perceived lack of relevance

Basic tariff details



Expected data points as relevant to help find a new deal

Personal info / usage



Questions raised around the relevance of certain data points:

- Location history
- Home address
- Vulnerability indicators
- Linked contracts
- Monthly spend
- Accessibility needs
- No. of devices attached
- Arrears

"I'm only really happy to share my information if I can see the benefit or how it's actually being used. It all feels a bit Big Brother to me"

Male, Unengaged, Dual play, Bristol, 75+

Personal experience info



Expected data points as relevant to help find a new deal

"Don't like the fact someone knows where I live exactly. Would be okay giving postcode or area. If controlled, then that's fine"

Male, <40, Unengaged, Triple Play, Leeds

"I just don't think they need this. I could end up with unwanted marketing"

Male, 30-64, Unengaged, Triple Play, Belfast

More clarity was needed around the benefits of providing access to these data points in order to encourage sharing

<div><div>- Location history</div><div>- Arrears</div></div>	<div>Intrusive information</div>	<div><div><div>• Don't understand the relevance of sharing these data points and they were felt to be intrusive:<div><div>◦ 'Location history' – “Feels like Big Brother is watching you”</div><div>◦ 'Arrears' - Could be detrimental to share (e.g. may affect price or put providers off)</div></div></div></div></div>	<div>Clarity was needed on what the data will be used for (i.e. the benefit of sharing)</div>
<div><div>- Home address</div><div>- Linked contracts</div><div>- Monthly spend</div></div>	<div>Too specific</div>	<div><div><div>• Unnecessary data points and too much information</div><div>• 'Home address' - Fear of receiving lot of junk mail</div><div>• 'Linked contracts' - Trying to pull in and involve family members unnecessarily</div><div>• 'Monthly spend' - Might impact on the prices given (i.e. use current price as basepoint)</div></div></div>	<div>SME</div> <div>More intrusive data points were less relevant (i.e. not personal to the individual), therefore SMEs were less bothered about sharing</div>
<div><div>- No. of devices attached</div></div>	<div>How will they know?</div>	<div><div><div>• Not sure why this would impact on their quote or how providers would know this</div></div></div>	
<div><div>- Vulnerability indicators</div><div>- Accessibility needs</div></div>	<div>Concerns over usage</div>	<div><div><div>• Don't see themselves as vulnerable / don't like labels (especially financial, physical). Physical, mental health, low literacy potentially misunderstood its purpose / relevance. Others worry that it might be used negatively</div></div></div>	

Vulnerable audiences do not want to be labelled as such... particularly without any explanation

Case Study 1: Physical health condition, Female, <40, Norfolk

Background: Currently unemployed, and is a full-time stay at home parent to her 3 children. Suffers from chronic fatigue syndrome

Set up: With BT for her broadband and landline package. She knows her requirements, however she can feel overwhelmed when engaging with the market with so much information and choice out there

Concerns: She felt Open Communications was a bit 'Big Brother'. She didn't like data sharing, especially around 'vulnerability indicators'. She was sensitive about providing information about her physical health, and felt this had been used to discredit her in the past (e.g. with insurance). While she was more receptive once this was fleshed out, these terms may need to be clearer and 'more layman, less technical' to avoid these negative initial reactions

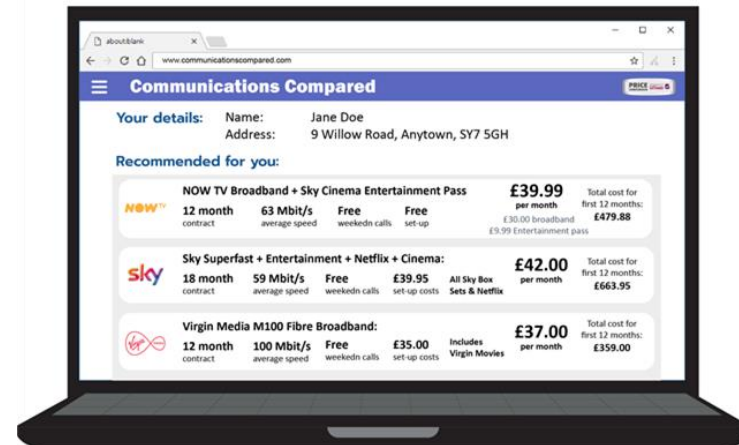
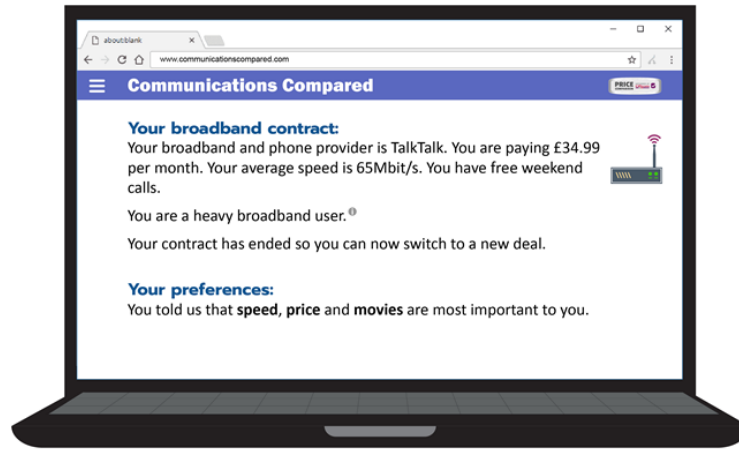
“Vulnerable indicators? It's nobody's business what my health conditions are. You think I'd go for that because it's for me, but I don't know how this would benefit me”

- Often an instinctive reluctance to be labelled or to share information about vulnerability - why was it relevant?
- However, explanation re: **vulnerability indicators** helped make it relevant for some - especially for the more financially vulnerable:
 - Sharing information to help tailor deals offered “to ensure they're affordable and would help make sure you are offered access to social tariffs” was received positively

“I'm on state benefits so any help on deals would be great. I guess I just instinctively wouldn't see that as a 'vulnerability indicator' so that needs some explanation, quickly and clearly.”

Male, >40, Financially Vulnerable, Larne

The illustrative comparison tool was seen as simple and straightforward, helping to alleviate the challenges of searching for a new deal



Overall appeal was higher than the initial concept

Scores mostly improved or stayed the same upon seeing how the data would be used and how it could help

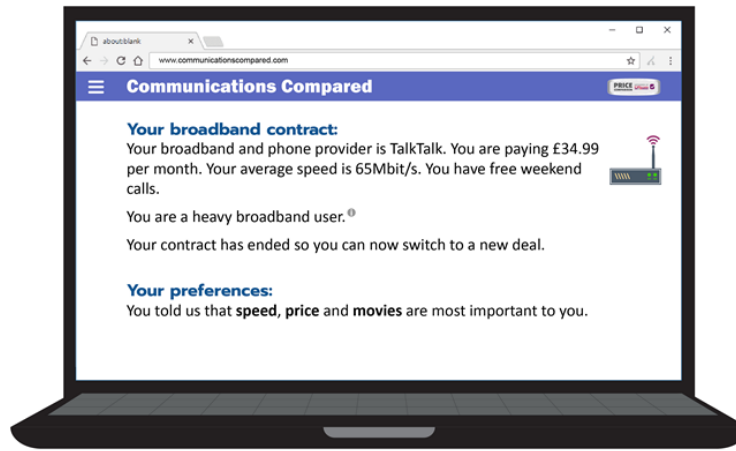
- Overall the comparison was much easier and quicker than expected
- It **tackles many of the pain points** for finding a new deal (e.g. don't know what they have / need, too much choice, time consuming, not comparing like for like information)

"Looks simple to use and I can tailor it to exactly what I would like, e.g. the type of phone that I like."
Male, <40, Engaged, Triple Play, Norwich

"I like it. It gives information of your current usage. I like being told or to know different offers from different providers, and I like there's a detailed breakdown of information"
Male, >40, Engaged, Triple Play, London, Financially Vulnerable

- A few **Low literacy** and **75+** raised that it might be a bit difficult for them to do it online

Current deal and preferences summary was clear, informative and simple to understand



On reflection...

Being shown this prompted some to find out their usage or actually engage in the market. Helping them to understand their own usage easily is highly valued

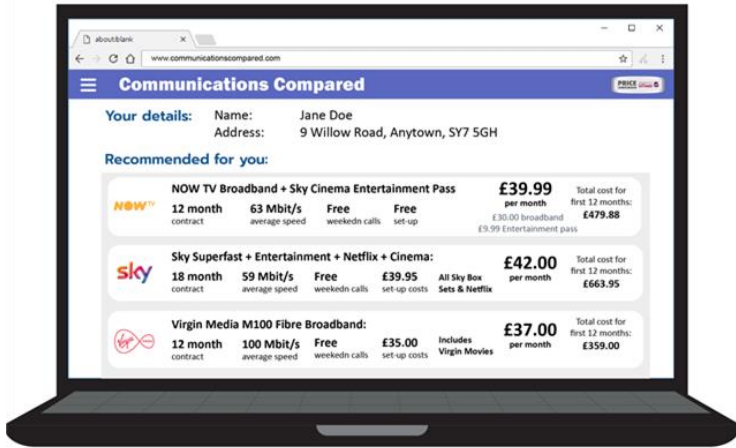
“After we spoke I actually went out and changed my mobile plan! I realised I was paying more than I needed and switched to a cheaper one”

Reflective Depth, Male, <40, Unengaged, Triple Play, Norfolk, Mental Health Condition



- The summary of the current deal had **strong appeal**:
 - It was simple, easy to take in and had clear information
 - ‘Enlightening’ - at very least you could use it to negotiate with your current provider
- ‘Your preferences’ provided greater reassurance that deals would be tailored to their needs and ensured that the focus of deals were relevant
- The concept was particularly useful for **Dual/Triple Play packages** as there was less understanding of their usage needs (e.g. broadband speed, which channels they watch) compared to **mobile**
- A few **questions were raised**:
 - How complex are the filters (e.g. can they filter by providers / handset)?
 - How does it make assumptions about which handset they want?
 - What if a better broadband speed becomes available?
 - It assumes you want a similar deal - how it would work for those wanting to downgrade / change packages, especially for:
 - **Financially vulnerable** that want the ability to save
 - **Triple play** - may want to downgrade channels / packages

There was recognition that the results page would be simpler to navigate if tailored to their needs and usage



“It sounds great and is what I need - I’m not having to go to different places and find out what I’m paying or what my speed is. Looks very similar to what you have with the comparison sites”

Female, Engaged, Triple Play, Wrexham, 75+

- It was a step up from existing PCWs as it had the added benefit that all of the deals were relevant to them and their needs
- It was felt to be straightforward to select a **mobile** deals as long as they were clear on their desired handset
- However, it was felt that it might be more complicated for **Triple Play** (compared to **Dual**) as TV channels added another layer of complexity (e.g. have more emotional attachment to specific channels and saved / downloaded content)
- For some, this might just be the starting point of their journey:
 - **Engaged** audiences may still want to look at other websites (as they would typically do) and talk to providers to make sure they have the best deal
 - **Low literacy / 75+** may want to talk to someone to check their understanding of the deal is correct before purchasing
- There was a suggestion to have their current deal at the top to aid comparisons

The visualisation helped to improve some initially doubtful participants' opinions

Case Study 1: Female, >40, Triple Play, Unengaged, Belfast

Background: Works full-time in the Civil Service and lives at home on her own

Set up: She has Sky for broadband, landline, pay TV and O2 for her mobile. She has been with them all for as long as she can remember. She is openly apprehensive of change - **“If something isn't broke don't fix it”**. She feels she has no way of knowing if she is actually getting a better deal. In terms of her mobile provider, all she needs to do is be able to make calls, take, send and receive pictures

What changed?: She was initially sceptical and found the concept in no way appealing, scoring it a **3/10**. This came from an apprehension about being bombarded with calls to change provider. This opinion was quickly changed having seen the alert process as well as the account aggregator. This would be a much clearer and concise tool that she feels she could comfortably use, finally scoring the concept a **7/10**

“This is much more straightforward and easy to understand. It's concise”

Case Study 2: Female, >40, Dual Play, Unengaged, Wrexham

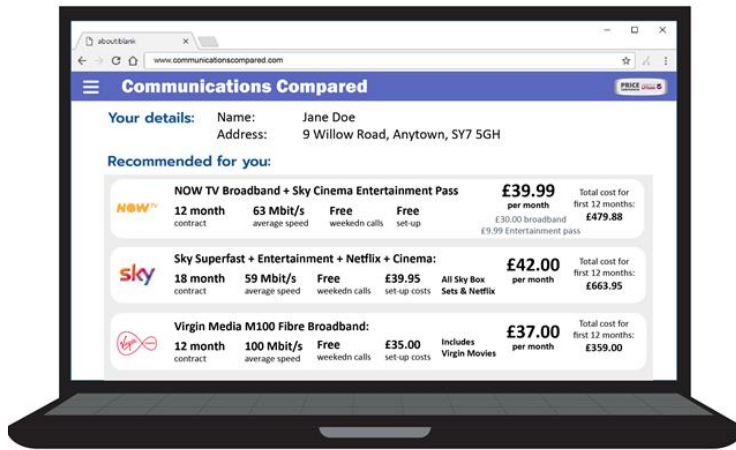
Background: She works as a full-time carer and lives with her teenage daughter

Set up: She has Sky for broadband and landline, and she has been with O2 for her mobile since 2005. She is highly satisfied with Sky, and their reputation means a lot to her - **“they're a large company and I trust them”**. She feels overwhelmed by the prospect of having to look through a mass of information when looking for a new deal. She's much more confident sticking to what she knows, even if this means paying more

What changed?: She was initially sceptical of Open Communications in helping her overcome her current barriers to engagement. However, the simple verification process and easy-to-use comparison tool changed her mind, providing a much more user-friendly tool to allow her to compare deals based on her own needs

“I'm starting to warm to the idea now after seeing the comparison tool. I'd still only want to look at the major providers first”

SMEs: the concept had high appeal due to its potential to save them time, hassle and money



“Quick and easy would be the main thing for me. It won’t take too much of my time, sitting there hours just to filter through loads of information. They should just all be there and a few clicks of the mouse, you have all the information there to proceed”

SME, Moderately Engaged, Dual Play, Bristol

- The **SMEs** were more positive than individual consumers, with the expectation that allowing TPLs to access their usage information would contribute to reducing hassle, provide better value for money and save time
- However, SMEs wanted search results to reflect their more complicated setups and requirements, such as:
 - Phone bundles for multiple staff with varying usage needs (e.g. could have both heavy and light mobile users to find deals for)
 - Excellent account management and customer service was also important in case they experienced any issues with their service / package (i.e. no broadband = lost money)

“As I said there is always unlimited data which really is just to give peace of mind. But very few people (employees) actually need unlimited data. I think this (the concept) would allow you to look into the actual usage within the package”

SME, Engaged, Dual Play, Leeds

SME set-ups and needs can be complex and recognition that open comms could help with navigating this

Case Study 1: SME, Moderately Engaged, Norfolk

Background: Managing Director of a small corporate events company. He lives with his wife

Set up: He is with Plusnet for his broadband and landline. He feels that the current market is too fragmented, and feels current solutions don't cater for more complex business needs like they do for personal consumer use (e.g. need to split out broadband, landline and business mobile). What's also crucial for him is strong account management and customer service when things go wrong (especially in rural Norfolk with patchy coverage)

Appealing?: He was positive around the concept, and felt it provided the visual, easy to use, 'one stop shop' solution he was looking for. He would have liked to have seen more information around providers' customer service offering for added reassurance

“Where is the ‘support available’? That's the big thing for me. It's mainly about when things go wrong, knowing that I'll be supported by my provider”

Case Study 2: SME, Moderately Engaged, Bristol

Background: She owns and runs a busy independent cafe in Bristol, and lives with her husband and two daughters

Set up: With KINEX since 2019 for her broadband and landline, however is highly dissatisfied. She gets poor WiFi connection / coverage which is frustrating for both her (e.g. card machine payments, music / speakers) and her customers (e.g. patchy WiFi) - and at a high price. KINEX approached her directly at the right time, and she was too busy to carry out proper research into the best deals for her

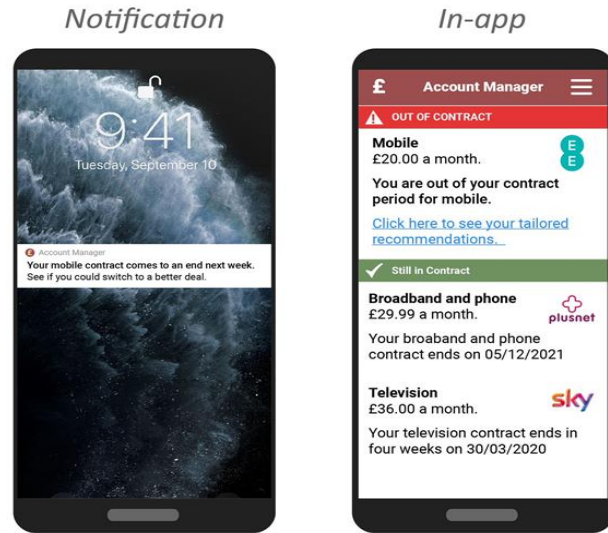
Appealing?: She loved the Open Communications concept - it would take the legwork out of searching. As she's very open to data sharing around her business usage, she felt the platform would allow her to make considerable cost savings too

“This would be amazing. I still don't know my business usage, and sites like this would make my life so much easier”

6

Perceptions of Account
Manager & Aggregator
Use Cases

The Account Manager offered a simple and easy way to manage their contracts

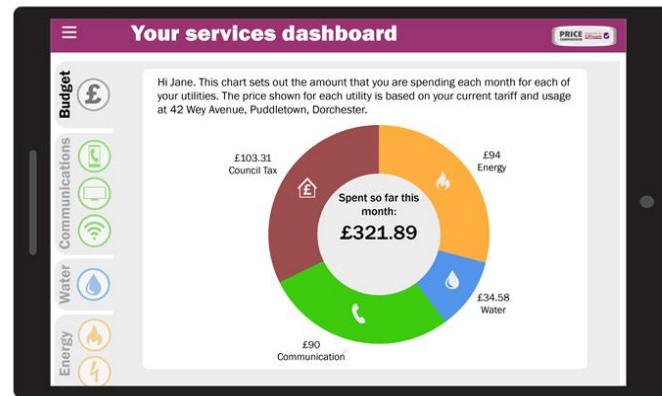
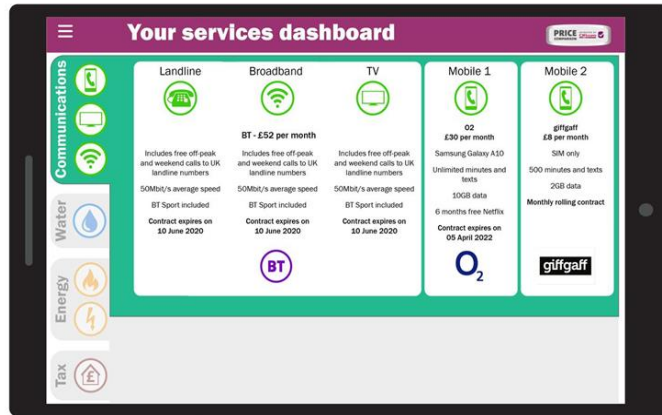


- The Account Manager is able to bring key information about your different telecoms products into one place.
- You are able to identify how much you are paying for each telecoms product that you have and it tells you whether you are in or out of contract (includes end of contract date).
- The Account Manager will notify you when you are out of contract on a product. It will provide you with a link which, if you choose to click on, it will search for tailored recommendations for that specific product using your current information.

“I like this already. I have this with Sky which has everything in one place”
Male, <40, Engaged, Triple Play, Norfolk

- **Universal appeal** across all of the people spoken to
 - A simple and easy way to manage their contracts
 - Makes key details and suitable deals more accessible
- Useful text alerts that can stop them rolling out of contract
 - While providers are mandated to give end of contract notifications, emails were perceived to potentially get missed or forgotten about - the Account Manager tool could help here
 - BUT - they don't want 'lots' of alerts and only send when they are reaching a point where they are able to move (e.g. a month before their contract end).
- Questions also centre around its suitability for less tech savvy consumers (e.g. 75+), how it would work, the ability to set the frequency of alerts, and who would provide it (e.g. independent body or TPI?)
- Ultimately, while appealing and useful, the Account Manager was largely seen as a secondary benefit compared to the comparison search functionality

The dashboard was a useful organiser, but less certainty around its potential everyday usefulness

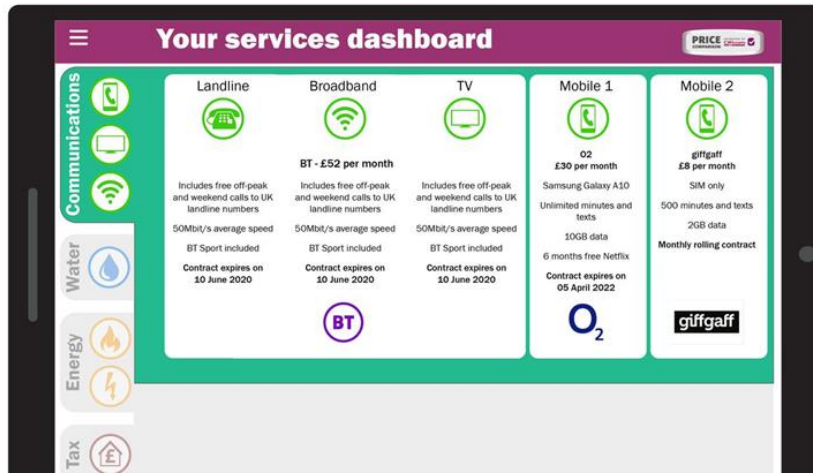


- **Overall** - a simple and helpful account summary, with praise for the 'one stop shop' format
 - It would be used for financial management and as an easy glance at their current usage
 - Audiences assumed this would be an extension of the Account Manager app, and not a separate destination
- There were mixed views on having lots of contract information in one place:
 - Overall the '**younger**' audiences (<40 years) thought it was helpful
 - The '**older**' audiences (>40 years) found it worrying and a bit overwhelming, with additional questions around its suitability for some **75+** / less tech savvy consumers
- It was a useful reference point but they expected to have low engagement with it (i.e. little reason to frequently look)

"Easy to see. Lets me know what I have and when my deal expires so you can keep on top of it"
Female, <40, Unengaged, Triple Play, Peterborough, Financially Vulnerable

"Marginalises vulnerable people who don't have computer skills/access"
Female, >40, Unengaged, Triple Play, Edinburgh

The dashboard was a quick way to check on the status of contracts / deals in the household



“Would be good to have it all in one place like this, rather than different logins for my water and energy and so on”

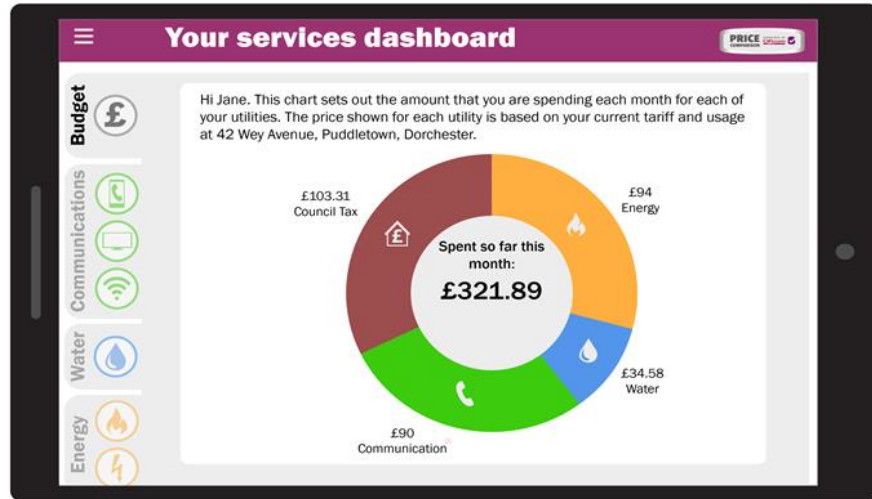
Male, 30-64, Unengaged, Dual Play, Wrexham

- A simple and easy way to keep an eye on their communication contracts and was particularly useful for checking contract end dates
- It saves time as information is all in one place making key details accessible
- There were suggestions around the ability to customise the dashboard (e.g. click into each element for more information, usage details, cost breakdowns, delete sections that aren't relevant, such as the TV section for those with dual play)
- A useful reference point but expected low uptake more widely, especially for communications packages (may not check it regularly)
 - **Mobile** had slightly more reason to engage to check data allowance

“Might be good to have a breakdown of how much each section costs within the package. For example instead of saying £52 with BT, give a break down of how much the broadband costs and how much landline costs”

Male, >40, Highly Engaged, Dual Play, London, SME

The dashboard was a useful reference tool, but unlikely to be used regularly - needed to interact to stay relevant



“It’s nice to see. But would I personally use it? Probably not. It’d be more useful if it only focused on the bills I could do something about”

Female, <40, Engaged, Active, Wrexham, Low Literacy

“Useful, though I have a bill predictor with my bank so I use that”

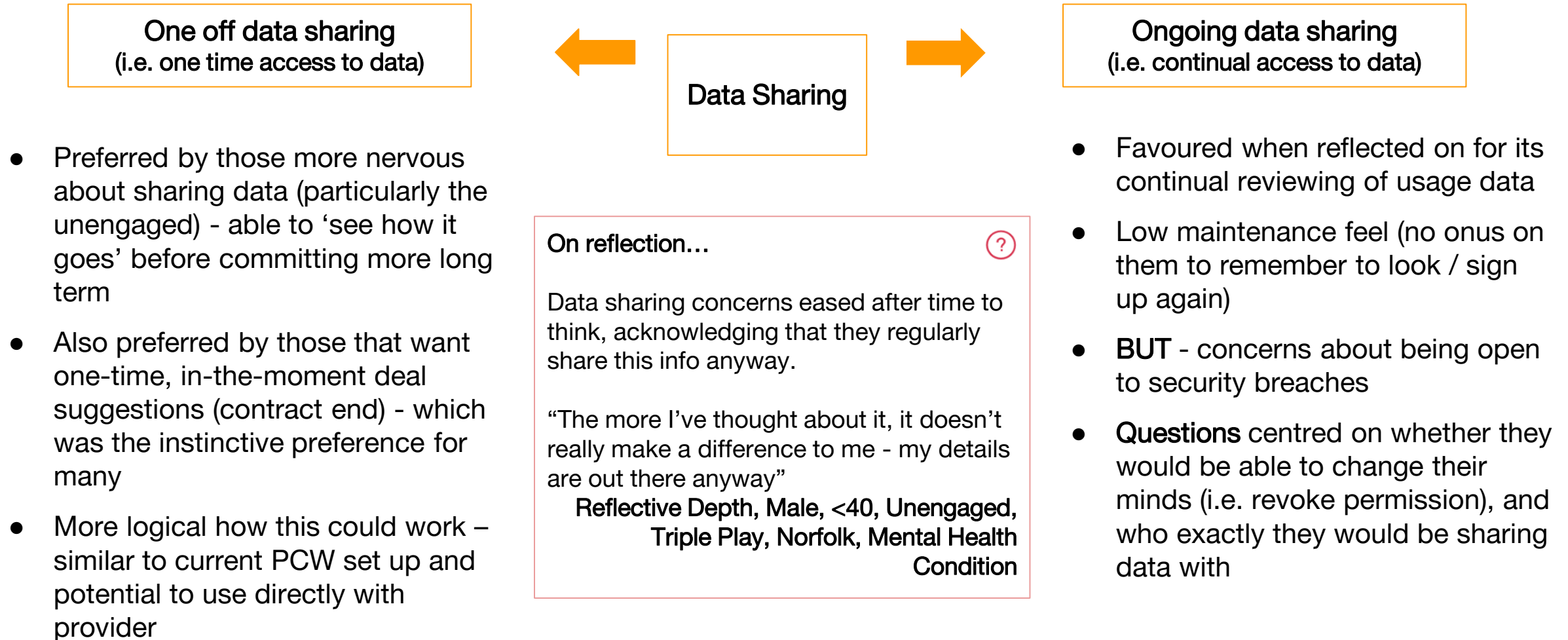
Male, <40, Engaged, Dual Play, Edinburgh

- The visual and colourful chart display was easy to read. It would help with managing budgets and was felt to encourage you to analyse your current spending
- For a few (**SMEs**, ‘younger’, engaged), it was similar to functions of other services and therefore unnecessary (e.g. Monzo, Sage)
- Others were happy with their current ways of managing bills
- Not all bills were relevant or wanted:
 - Some are fixed or they are currently mid contract so there is nothing they can do to save money
 - Northern Ireland don’t pay for water
 - **SMEs** - some have bills included within their Business tenancy rates
- **Other questions** centred around:
 - How accurate would it be?
 - How would it work if on a PAYG contract (mobile, gas / electric)?
 - The potential ability to add in other bills (e.g. insurance)?
 - How secure the data is? Is it password protected?
 - The ability to click on each element to get more information?

7

Reassurances &
Promoting Uptake

Data sharing concerns eased once the concept was understood, although for some ongoing sharing still felt intrusive



The Ofcom trustmark could play an important role as it provides reassurance and gravitas



"It is more appealing with Ofcom, as they're the regulator. But 'third parties' - would this be things like Compare the Market? Would you be bombarded...?"

Female, 30-64, Unengaged, Dual Play, Wrexham

"I've generally little idea around who is behind those websites and how secure they are, but I'd be happier to share this through Ofcom"

Female, >40, Unengaged, Triple Play, Edinburgh

On reflection...

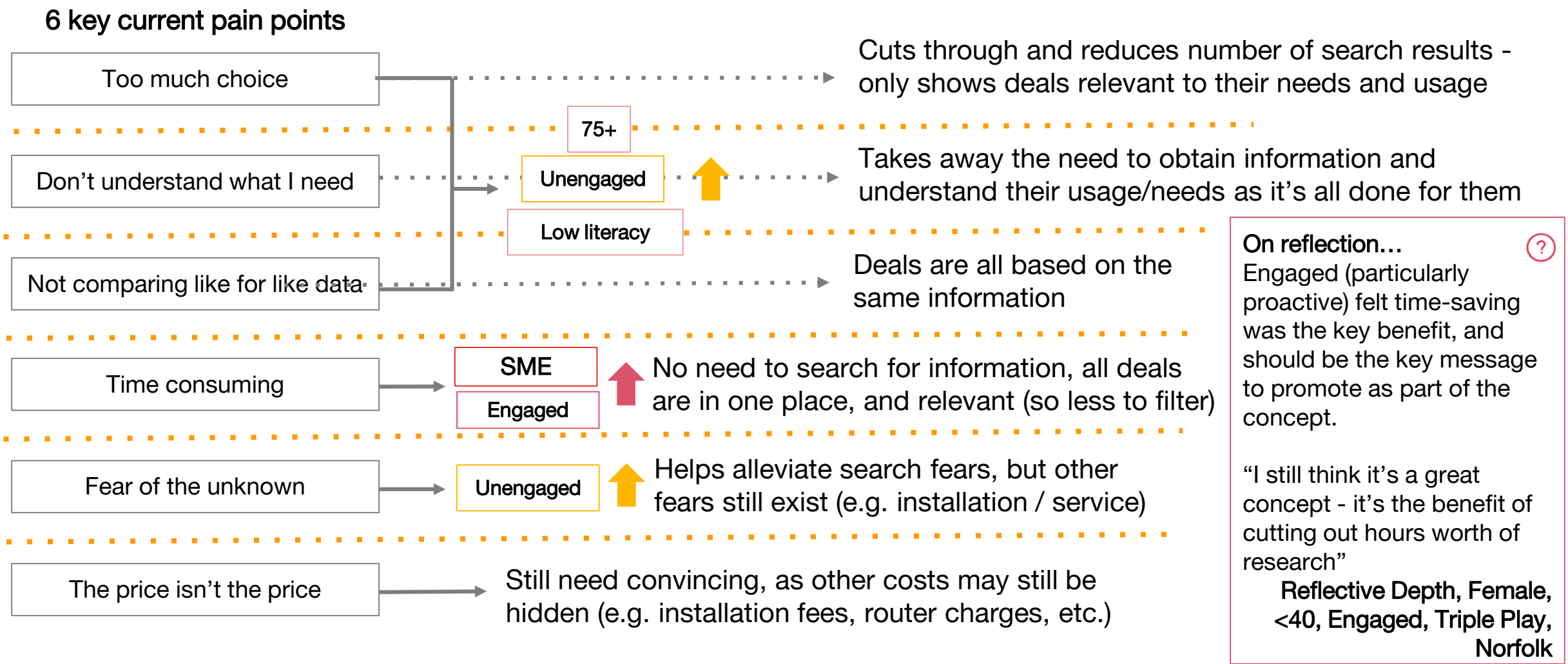
Despite the trustmark and Ofcom link, some were still worried about potential for TPI marketing and nuisance calls. The opt out process needs to be absolutely clear

"I don't like sharing my personal data. That just gets on my nerves. I don't like receiving loads of marketing stuff."

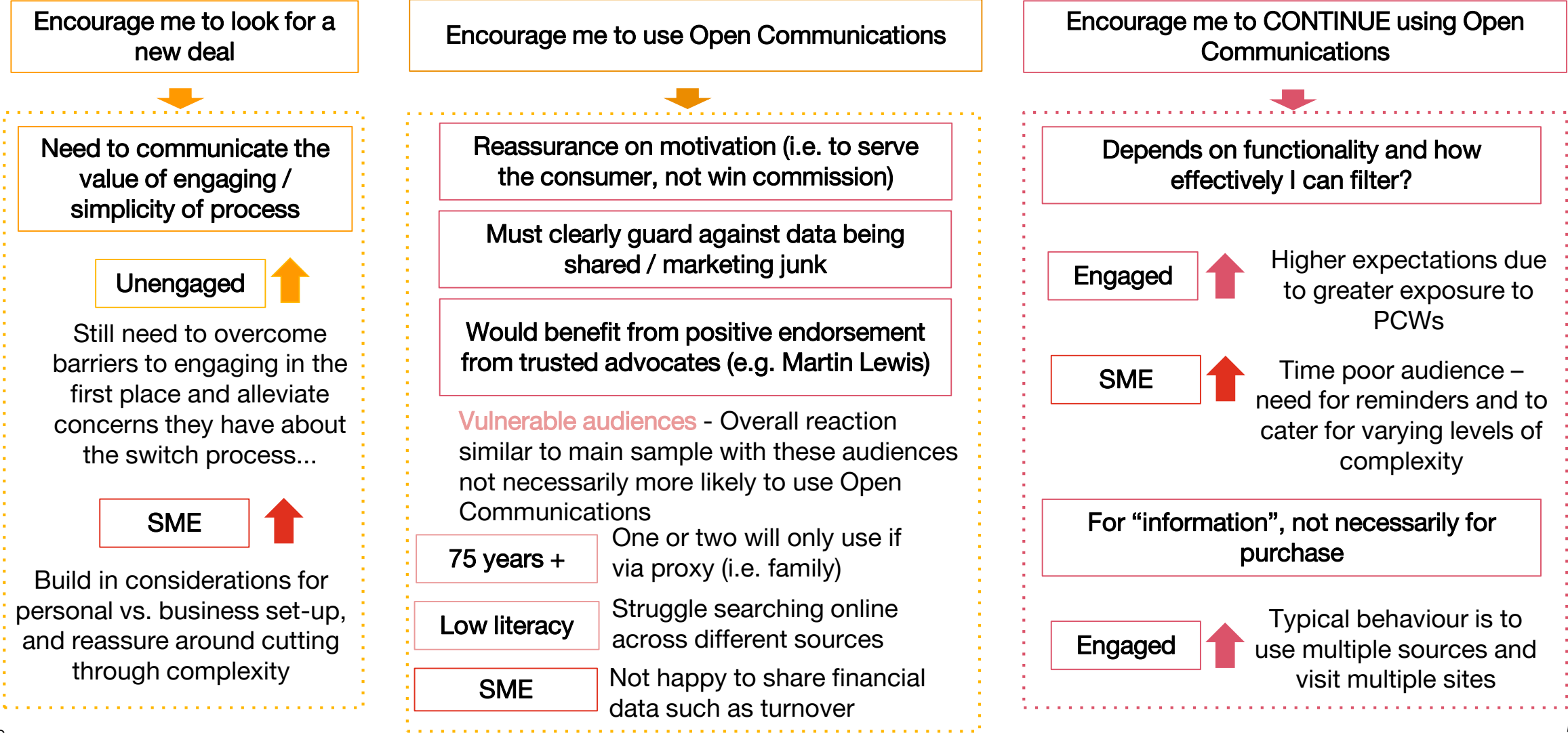
Female, >40, Engaged, Triple Play, Peterborough, Financially Vulnerable

- **Overall, the trustmark was well liked** and plays an important role in providing reassurances on the good intentions of the concept
- For those aware of Ofcom, it helps give the concept gravitas, which instils confidence
- Some compared it to the Which? trustmark, which has become a trusted and looked for logo
- But approval doesn't necessarily mean that Ofcom can control what providers / TPIs do and the outcomes of using these providers, as data leaks / customer service issues still occur
- **Challenge:** Well used sites (e.g. GoCompare) aren't Ofcom approved and those that are approved are rarely used (i.e. only a handful across the sample).

Open Communications works to address frustration points that centre around choice, comparisons, time and understanding



Messaging around Open Communications needs to work on reassuring consumers at various points during the process



Thank you

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Appendix

Full sample structure - focus groups

	England	England	England	Northern Ireland	Scotland	Wales		
	London (pilot)	Leeds	Norwich	Belfast	Edinburgh	Wrexham	TOTAL	Primary focus of discussion
Unengaged, Triple Play, 30-64	1						1	Comms
Unengaged (Apprehensive), Dual Play, ≥40			1				1	Comms
Engaged, Triple Play, <40			1				1	Mobile
Unengaged (Apprehensive), Triple Play, ≥40					1		1	Mobile
Engaged, Dual Play, <40					1		1	Comms
Unengaged, Triple Play, Mix of ages				1			1	Comms
Unengaged(Apprehensive), Dual Play, <40				1			1	Mobile
Unengaged, Dual Play, Mix of ages						1	1	Comms
Engaged, Triple Play, ≥40						1	1	Comms
Engaged, Dual Play, ≥40		1					1	Comms
Unengaged(Apprehensive), Triple Play, <40		1					1	Comms
TOTAL PER LOCATION	1	2	2	2	2	2	11	

Full sample structure - face-to-face interviews

	England	England	England	England	England	Northern Ireland	Scotland	Wales		
	London	Leeds	Norwich	Peterborough	Bristol	Larne	Edinburgh	Wrexham	TOTAL	Primary focus of discussion
SME, 2-9 employees	1		1			1	1		4	Comms
SME, 10-20 employees	1	1			1				3	Comms
Financially vulnerable	1			1					2	Mobile
Financially vulnerable		1						1	2	Comms
Physical health condition	1		1						2	Mobile
Physical health condition		1							1	Comms
Mental health condition					1				1	Mobile
Mental health condition			1				1		2	Comms
75+				1	1				2	Mobile
75+						1		1	2	Comms
Low literacy						1			1	Mobile
Low literacy				1			1		2	Comms
TOTAL PER LOCATION	4	3	3	3	3	3	3	2	24	

Glossary

Acronym	Description
PAYG	<ul style="list-style-type: none">• Pay As You Go
PCW	<ul style="list-style-type: none">• Price Comparison Website
SME	<ul style="list-style-type: none">• Small / Medium Enterprise
TPI	<ul style="list-style-type: none">• Third Party Intermediary