A1. Consumer Dashboard

Ofcom carries out research and collects data about consumers' experience across the sectors we regulate. Where possible, we evaluate outcomes for consumers whose ability to participate in communications markets and society may be affected by factors such as their age, disability or income.

The dashboard below shows some key data points highlighting where increases or decreases are statistically significant compared to any previous waves of research, or between consumer groups. Further data and analysis is set out in this report.

Table 1: Take-up of services and devices – Ofcom Technology Tracker, H1 2018

	Total	16-24	65-74	75+	AB	C1	C2	DE	Urban	Rural
Fixed-line phone	**81%**	64%*	95%**	93%** ↓	90%**	81%	80%	70%*	79%	89%**
Mobile phone - personally use	**94%**	99%**	91%*	66%*	98%**	97%**	95% ↑	88%*	94%	95%
Smartphone - personally use	**78%**	95%**	50%*	18%*	89%**	83%**	78% ↑	63%*	79% ↑	76%
Stand-alone landline	**13%**	5%*	23%**	43%**	12%	10%	13%	18%	13%	15%
Mobile-only households[1]	**19%**	36%**	4%*	6%* ↑	10%	19%	20%	29%**	20%	11%*
Fixed broadband take-up[2]	**80%**	78% ↓	77%	48%*	91%**	84%**	79%	64%*	79%	84%**
Standard broadband take-upΔ[3]	**39%**	38%	43%	27%*	41%	39%	41%	35%	40%	39%

[1] Mobile-only households have a mobile phone in the household but do not have a landline in the household that can be used to make and receive calls. The mobile-only figure does not exclude those who say that they pay line rental to receive the fixed broadband service.
[2] The total of standard and superfast broadband take-up does not equal fixed broadband take up due to the relatively high proportions of respondents unaware of their broadband subscription type.
[3] Broadband through a phone line or cable service - which is not superfast, so the download speed is less than 30Mbit/s. Year-on-year comparison with 2017 is not available.

Superfast broadband take-upΔ[4]	**30%**	25%	22%*	14%*	38%**	33%	28%	18%*	29%	33%
Use the internet anywhere	**90%**	98%**	77%*	49%*	97%**	95%**	89%	77%*	91% ↑	90%
Ownership of any connected device in the household[5]	**83%**	82% ↓	79%	50%*	95%**	91%**	81%	63%*	83%	85%
Pay TV[6]	**56%**	54%	53%	38%*	64%**	60%**	58%	41%* ↓	56%	54%
Over-the-top subscriptions[7]	**38%** ↑	56%** ↑	17%*	3%*	45%**	44%** ↑	37% ↑	25%*	37% ↑	43%** ↑
Dual play bundling[8]	**43%** ↓	42%	41%	36%*	48%**	46%	41%	38%*	42%	51%**
Triple-play bundling[9]	**31%**	30%	28%	13%*	34%	32%	33%	24%*	31% ↓	26%*
Quad-play bundling[10]	**5%** ↑	2%*	7%	6%	7% ↑	5% ↑	5%	4%	5% ↑	4% ↑

Source: Ofcom Technology Tracker, H1 2018. Base: all respondents, except Δ where the base is all of those with fixed broadband at home

**/ ** = less/more likely compared to total UK tested at 95% significance level. Arrows indicate significant differences compared to H1 2017 tested at 95% significance level based on the effective sample size.*

Note: Age, socio-economic group significance tested at 95% against total.

[4] A premium service that delivers higher speeds through either fibre optic or cable - the download speed is 30Mbit/s or higher. Year-on-year comparison with 2017 is not available.
[5] Data for 'any' refers to desktop PC, laptop, netbook, tablet
[6] This includes household take-up of television services from Virgin Media, Sky, BT TV, TalkTalk TV, EE TV and YouView
[7] This refers to household subscriptions to online on-demand services, including Netflix, Amazon Prime Video, NOW TV, Disney Life, Hayu and other paid-for on-demand television services.
[8] Household has the same communication provider for two communication services, such as broadband, mobile, pay TV or landline
[9] Household has the same communication provider for three communication services, such as broadband, mobile, pay TV or landline
[10] Household has the same communication provider for four communication services, including broadband, mobile, pay TV or landline

Table 2: Access to services and devices by disabled people – disability consumer research

	Household ownership		Personal use	
	Non-disabled	Disabled	Non-disabled	Disabled
Landline	66%	74%**	56%	66%**
ANY mobile	91%	80%*	86%	71%*
Simple mobile	22%	36%**	18%	31%**
Smartphone	81%	53%*	75%	45%*
Any computer (PC/laptop/tablet)	85%	64%*	77%	54%*
Tablet	63%	44%*	52%	34%*
Games console	38%	23%*	24%	13%*
Smart TV	48%	30%*	43%	26%*
InternetΔ	NA	NA	92%	67%*

*Source: Ofcom disability consumer research. Question: Q1. Does your [household] have… QL. Which of the following do you currently ever use, if at all? Base: non-disabled: 17510, all disabled: 3524. Note: ** indicates that a disability group is significantly higher than non-disabled consumers while * indicates that a disability group is significantly lower than non-disabled consumers (significance tested to 95%). ΔInternet use is based on personal use only*

Table 3: Limitations and preventions by disability type – disability consumer research

	Landline			Mobile (any)		
	Personally use landline	Use of landline is LIMITED by disability	Use of landline is PREVENTED by disability	Personally use mobile (ANY)	Use of mobile is LIMITED by disability	Use of mobile is PREVENTED by disability
All disabled	66%	6%	3%	71%	7%	8%
Mobility impaired	71%**	4%*	2%	67%*	4%*	7%
Hearing impaired	74%**	10%*	2%	71%	5%	8%
Visually impaired	57%*	6%	4%	67%	11%**	11%

Multiple impairments	69%	7%	2%	72%	9%	8%
Learning disability	38%*	5%	4%	77%	5%	9%

	Smartphone			Internet		
	Personally use smart phone	Use of smart phone is LIMITED by disability	Use of smartphone is PREVENTED by disability	Personally use the internet	Use of internet is LIMITED by disability	Use of internet is PREVENTED by disability
All disabled	45%	5%	3%	67%	4%	2%
Mobility impaired	36%*	3%*	2%	62%*	3%	0%*
Hearing impaired	46%	5%	2%	69%	0%*	1%
Visually impaired	46%	8%	5%	63%	9%**	3%
Multiple impairments	42%	6%	4%	62%*	5%	4%**
Learning disability	62%**	5%	3%	86%**	5%	4%

	TV (any)		
	Personally use TV (any)	Use of TV (any) is LIMITED by disability	Use of TV (any) is PREVENTED by disability
All disabled	79%	9%	8%
Mobility impaired	78%	6%*	6%*
Hearing impaired	84%**	13%**	10%
Visually impaired	76%	20%**	13%**
Multiple impairments	81%	12%**	8%
Learning disability	73%	10%	8%

Source: Disability consumer research. Questions: Q.5 You mentioned an illness or condition that limits your daily activities or the work you can do. Does this prevent you from using any of the following services or devices? i.e. you cannot use this service or device at all because of this. Q.6 You mentioned an illness or *condition that limits your daily activities or the work you can do. Does this limit your use of any of the following services or devices? i.e. you can still use this service or device, however you experience difficulties when using it. Base: mobility impaired: 1360, hearing impaired: 307, visually impaired: 178, multiple impairments: 792, learning disability: 109 Note: ** indicates that a disability group is significantly higher than all disabled consumers while * indicates that a disability group is significantly lower than all disabled consumers (significance tested to 95%).*

Table 4: Affordability difficulties – Ofcom Affordability Tracker

	2014	2015	2016	2018
Claimed difficulty in paying for any communications service	14%	9% ↓	9%	9%
Claimed to have had some sort of communications debt in the last year	3%	2%	2%	2%

Source: Ofcom Affordability Tracker

Red arrows indicate significant decrease from previous year

Difficulties paying and debt (2018)	Aged 16-34	Aged 35-64	Aged 65-74	Aged 75+
Claimed difficulty in paying for any communications service	13%*	9%	5%	2%**
Claimed to have had some sort of communications debt in the last year	4%	2%	1%	-

	AB	C1C2	DE	Long term disability/ illness	
				Yes	No
Claimed difficulty in paying for any communications service	5%**	8%	14%*	16%*	7%**
Claimed to have had some sort of communications debt in the last year	-	2%	5%*	4%*	2%

Note: Age, socio-economic group and disability significance tested at 99% against total.

***/ * = more difficulty/less difficulty paying compared to total UK*

Table 5: Definition of Ofcom's financial vulnerability segments

Most financially vulnerable (MFV)	Potentially financially vulnerable (PFV)	Least financially vulnerable (LFV)
All respondents - working and non-working	**Only those working either part-time or full-time. Also defined within the following income groups:**	**All respondents - working and non-working**
Household (HH) income up to £17,499	**HH income between £11,500 - £17,499**	
One adult, two or more children	One adult	
Two adults, two or more children	One adult, one child	
More than three adults (with or without children)	Two adults	
	Two adults, one child	
HH income between £17,500 - £29,900	**HH income between £17,500 - £29,900**	**HH income between £17,500 - £29,900**
One adult, four or more children	One adult, one child	One adult
Two adults, three or more children	One adult, two children	
Three adults, two or more children	One adult, three children	
Four or more adults (with or without children)	Two adults	
	Two adults, one child	
	Two adults, two children	
	Three adults	
	Three adults, one child	
HH income between £30,000 - £49,999	**HH income between £30,000 - £49,999**	**HH income between £30,000 - £49,999**
One adult, four or more children	One adult, two children	One adult, one child

Two adults, three or more children	One adult, three children	Two adults
Three adults, two or more children	Two adults, one child	
Four adults with at least one child	Two adults, two children	
Five or more adults (with or without children)	Three adults	
	Three adults, one child	
	Four adults	
		HH income above £50,000+
		Any household size
	Plus:	
	Includes respondents from households with at least two adults who do not work, where SEG is ABC1/C2 and they fit into the income categories above	

Table 6: Consumer switching – Ofcom Switching Tracker 2018

Switched in 12 months to September 2018 (excluding home movers)	Total	16-24	25-44	45-64	65+
Landline standalone	7%	ΔΔ	ΔΔ	10%	1%*
Mobile contract standalone	9%	16%**	8%	8%	10%
Pay-TV standalone	5%	ΔΔ	7%Δ	4%	1%Δ
Dual play	9%	ΔΔ	11%	8%	5%
Triple play	7%	10%Δ	7%	7%	6%Δ

	AB	C1	C2	DE
Landline standalone	ΔΔ	4%Δ	6%Δ	10%
Mobile contract standalone	6%*	12%	10%	11%
Pay-TV standalone	3%Δ	5%Δ	6%Δ	6%Δ
Dual play	10%	9%	10%	6%
Triple play	5%	6%	8%	15%

ΔCaution: low base

ΔΔBase too low to report

Significance testing: Green indicates higher than average, red lower than average

A2. Methodology

Time series data

Where possible, data from H1 and H2 2018 have been compared with data from a similar time period in previous years.

Statistical reliability

For reporting purposes, sub-group differences are noted in the report only when they are significantly different from the total sample or sub-groups within the sample. Unless stated otherwise, we have reported differences at the 95% confidence level; this means that if you asked 100 people in the population, 95 of them would give a similar response to the finding reported. To show this trend on the charts, a circle (red or green) represents a significant change (increase or decrease) at the 95% confidence level, while an arrow (red or green) represents a year-on-year increase at the 95% confidence level.

Insufficient sample sizes (i.e. fewer than 50 participants) were achieved for some demographic groups for some metrics. Where this is the case, no data have been reported.

Low sample sizes (i.e. between 50 and 100 participants) were achieved for some demographic groups for some metrics. Where this is the case, it has been highlighted that the data should be viewed with caution and as indicative only, as they are subject to higher margins of error.

The data tables for the tracking studies detailed below can be found at:
https://www.ofcom.org.uk/research-and-data/data/statistics/stats18

Ofcom Technology Tracker

Methodology	Face-to-face survey run by Critical Research
Core objective	To provide Ofcom with continued understanding of consumer behaviour in the UK communications markets (covering mobile and fixed telecoms, internet use, TV, on demand, radio, post and bundling) and to help monitor changes.
Sample size	3,730
Fieldwork period	The fieldwork is carried out in January and February. Up until 2018 there were two waves of fieldwork, with the second wave taking place in July and August.

Sample definition	UK adults aged 16+, reflective of the UK profile by sex, age, socio-economic group, region, employment status, cabled/non-cabled areas, rural/urban areas and levels of deprivation.
Weighting	Where necessary, the data have been weighted to ensure they are representative of the UK adult population.

Ofcom Switching Tracker

Methodology	Telephone (2013 and 2014) survey, telephone and face-to-face (2015) and face-to-face (2016, 2017 and 2018)
Core objectives	To monitor switching behaviour, attitudes and experiences across the communications markets - fixed, mobile, fixed broadband and multi-channel/pay TV, dual and triple bundles.
Sample size	2,601 (2018)
Fieldwork period	July-August in 2013, 2014, 2015 and 2016, August-September in 2017 and 2018
Sample definition	Representative sample of UK adults aged 16+, reflecting the UK profile of sex, age, socio-economic group, region, employment status, cabled/non-cabled areas, rural/urban areas and levels of deprivation.
Weighting	Data have been weighted to ensure the sample is representative of the UK adult population

Ofcom Residential Consumer Postal Tracker

Methodology	Combined methodological approach: face-to-face interviews conducted using random probability sampling and online interviews using quota sampling. This is run by Kubi Kallo Strategic Research Consultancy.
Core objectives	To provide trend data that enables us to monitor the industry over time.

	To collect data that enable comparisons to be made with historic data collected by Postcomm and other surveys in communications markets by Ofcom. The topic areas covered in this summary include: • The use of postal services • Volumes and types of post sent and received • Communication methods used instead of post • Awareness of postal services providers • Postal spend, cost awareness and perceived value for money of post • Experience of problems with postal services • Overall satisfaction with postal services and with elements of postal services
Sample size	Across the fieldwork period there were 5,836 respondents, including 1,481 face-to-face respondents (25%) and 4,481 online respondents (75%).
Fieldwork period	July 2017 – June 2018
Sample definition	Representative sample of UK adults aged 16+, reflecting the UK profile of sex, age, socio-economic group, and region.
Weighting	Data have been weighted to ensure the sample is representative of the UK adult population, and to correct the effect of a 'positivity bias' (it was noted that face-to-face respondents consistently gave more positive answers than their online counterparts).

Ofcom Affordability Tracker

Methodology	Face-to-face survey on two waves of Kantar Media's omnibus.
Core objectives	To track the proportion of the UK population who are unable to afford one more communications services and to gauge whether this causes them any difficulties in their everyday life.
Sample size	2014: 1,562 communications decision-makers, 2015: 1,719 communications decision-makers, 2016: 4,889 communications

	decision-makers. 2018: 3,563 communications decision-makers. N.B. the 2014 and 2015 samples were from one wave of the Kantar Media omnibus and the 2016 sample comprised a core sample from one wave and was boosted in two further waves in order to ensure a sufficiently large sample size of consumers in Northern Ireland and of those who had difficulty paying for communications services to allow detailed in- depth analysis.
Fieldwork period	10 March – 9 April 2014, 23 – 30 October 2015, 13 – 31 July 2016, 29 July – 3 August 2018
Sample definition	Screening samples of representative sample of UK adults aged 16+, reflecting the UK profile of sex, age, socio-economic group, region, employment status, cabled/non-cabled areas, rural/urban areas and levels of deprivation.
Weighting	Data have been weighted to ensure the sample is representative of the UK adult population.

Disabled Consumer Research

Methodology	Face-to-face omnibus survey run by Kantar Media.
Core objective	The objective of the survey is to track the access and use of communications devices and services among non-disabled and disabled consumers and monitoring disabled consumers' limitations and preventions of use caused by their disability.
Sample size	21,321 adults
Fieldwork period	May to July 2018
Sample definition	UK adults aged 16+, reflective of the UK profile by sex, age, socio-economic group, region, and employment status.
Weighting	Data presented in the tables have not been weighted as reporting is based on sub-groups of interest (for example, each disability group) and not the total UK sample.

Consumer engagement research

Methodology	Face-to-face and online survey run by Critical Research
Core objective	To provide Ofcom with an understanding of how consumers engage with the mobile, standalone pay-TV, dual-play and triple-play markets and the potential barriers to engagement.
Sample size	4,142
Fieldwork period	Fieldwork was carried out from January to April 2018.
Sample definition	UK adults aged 16+, sample based on profiles of each market from Ofcom's Technology Tracker.
Weighting	The data have been weighted within each market to ensure they are representative of each market within the UK population.

A3. Glossary of terms

Broadband A service or connection generally defined as being 'always on' and providing a bandwidth greater than narrowband.

Bundle multiple communications services purchased together from the same provider.

Communications Act Communications Act 2003, which came into force in July 2003.

DAB Digital audio broadcasting. A set of internationally accepted standards for the technology by which terrestrial digital radio multiplex services are broadcast in the UK.

DTT Digital terrestrial television. The television technology that carries the Freeview service.

Internet A global network of networks, using a common set of standards (e.g. the Internet Protocol), accessed by users with a computer via a service provider.

IP (internet protocol) The packet data protocol used for routing and carrying messages across the internet and similar networks.

ISP Internet service provider. A provider of access to the internet.

MMS Multimedia messaging service. The next generation of mobile messaging services, adding photos, pictures and audio to text messages.

Mobile broadband Various types of wireless high-speed internet access through a portable modem, telephone or other device.

Multichannel In the UK, this refers to the provision or receipt of television services other than the main five channels (BBC One and Two, ITV1, Channel 4/S4C, Five) plus local analogue services. 'Multichannel homes' comprise all those with digital terrestrial TV, satellite TV, digital cable or analogue cable, or TV over broadband. Also used as a noun to refer to a channel only available on digital platforms (or analogue cable).

Omnibus Quantitative market research survey carrying questions on different topics.

Over-the-top (OTT) video Refers to audio-visual content delivered on the 'open' internet rather than over a managed IPTV architecture.

PC Personal computer.

SIM-only A mobile contract that is sold without a handset.

Smartphone A mobile phone that offers more advanced computing ability and connectivity than a contemporary basic 'feature phone'.

Smart TV A standalone television set with inbuilt internet functionality.

SMS Short messaging service, usually used to refer to mobile text messaging (see text message below).

Socio-economic group (SEG) A social classification, classifying the population into social grades, usually on the basis of the Market Research Society occupational groupings (MRS, 1991). The groups are defined as follows.

A. Professionals such as doctors, solicitors or dentists, chartered people like architects; fully qualified people with a large degree of responsibility such as senior civil servants, senior business executives and high ranking grades within the armed forces. Retired people, previously grade A, and their widows.

B. People with very senior jobs such as university lecturers, heads of local government departments, middle management in business organisations, bank managers, police inspectors, and upper grades in the armed forces.

C1. All others doing non-manual jobs, including nurses, technicians, pharmacists, salesmen, publicans, clerical workers, police sergeants and middle ranks of the armed forces.

C2. Skilled manual workers, foremen, manual workers with special qualifications such as lorry drivers, security officers and lower grades of the armed forces.

D. Semi-skilled and unskilled manual workers, including labourers and those serving apprenticeships. Machine minders, farm labourers, lab assistants and postmen.

E. Those on the lowest levels of subsistence including all those dependent upon the state long-term. Casual workers and those without a regular income.

Stand-alone service a single communications service purchased from a provider, which is not purchased alongside any additional service. However, other services may be purchased from a different provider.

Tablet computer A mobile computer which is included within a single panel with a touchscreen.

Telecommunications, or 'telecoms' Conveyance over distance of speech, music and other sounds, visual images or signals by electric, magnetic or electro-magnetic means.