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Ofcom Consumer Panel Research
Quantitative Research Findings

Focus on Wales

June 2006

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Report outline

- This report compares the findings for residential consumers in Wales with those residential consumers in the **UK overall**
  - measures for the 2004 survey are also shown for comparison
- Differences shown of ±6% (where based on all respondents) are statistically significant
- Where findings for Wales are significantly different from the UK average or measures have changed significantly between 2004 and 2005 this has been shown using green and red arrows
  - to indicate significantly higher or lower measure for Wales
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

Profile of vulnerable groups by nation

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Older people (aged 65 plus)	16%	16%	18%	14%	16%
Rural	13%	16%	**22%**	**35%**	12%
Limiting long term illness/ disability	14%	**18%**	**29%**	15%	15%
Household income under £11,500	26%	**32%**	**43%**	29%	27%
TOTAL NATION SPLIT	**84%**	**8%**	**5%**	**3%**	**100%**
INTERVIEWS CONDUCTED	***1507***	***460***	***366***	***356***	***2689***

Source: Census 2001-Office of National Statistics and for rural areas Business Geographic ‘Urban Indicator’

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Summary of key findings for consumers in Wales - comparison to UK and change since 2004

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Knowledge

- Lower understanding of digital TV than UK overall, but increase since 2004 in understanding of broadband and 3G
- Overall awareness (aware of term or aware of service capability) of DAB, 3G and VoIP is lower than UK average
- Less likely than UK average to keep informed of developments regarding internet and digital TV
- Friends and family are the most popular source of advice, and less likely to refer to online and media sources than UK average
- Higher awareness of digital switchover compared to UK average, and a significant increase in awareness since 2004

Ownership

- Less likely than UK average to have internet access generally and broadband internet access in particular, and more likely to be voluntarily excluded for the internet
- Increase since 2004 in ownership of mobile phone, digital TV and broadband internet access, despite no increase in overall internet access

Usage

- Fewer uses made of mobile phone and internet generally, with fewer using the internet to transact, for entertainment, and for work/ studies information

Attitudes

- Generally lower levels of concerns or worries regarding services amongst owners compared to the UK average, and mostly no change in levels since 2004
- More likely to rate TV service as essential, with an increase in the importance of mobile phone and TV service since 2004
- Similar levels of satisfaction with services as the UK average, with increased satisfaction since 2004 most evident for digital TV and internet users
- More likely than the UK average to have ever switched suppliers for their landline phone and mobile phone services, with the incidence of having changed the company used for both services having increased significantly since 2004

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Awareness and understanding of communication terms – comparison to UK

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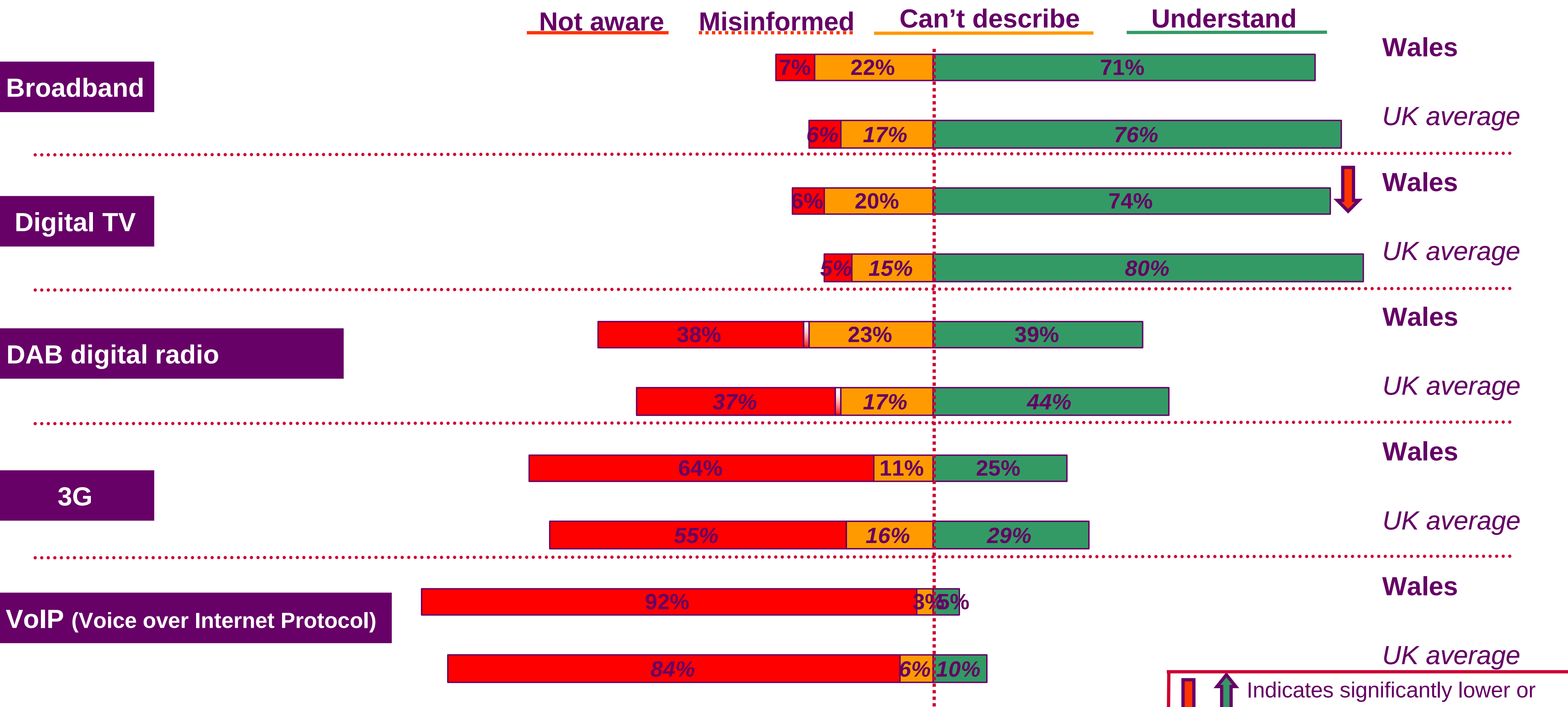
Knowledge

- High overall awareness for broadband and digital TV, moderate for DAB digital radio, and low for 3G and VoIP
- Awareness of each of the communication terms is significantly lower amongst older people (aged 65 and over) in Wales and those in low income households (under £11,500 per year)
- Lower understanding of DTV compared to the UK average – due to rise in understanding at UK level driven by consumers in England and to a lesser extent those in Northern Ireland



Base : All respondents in Wales (366) and UK overall (2,689)

Awareness and understanding of communication terms – change since 2004

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Knowledge

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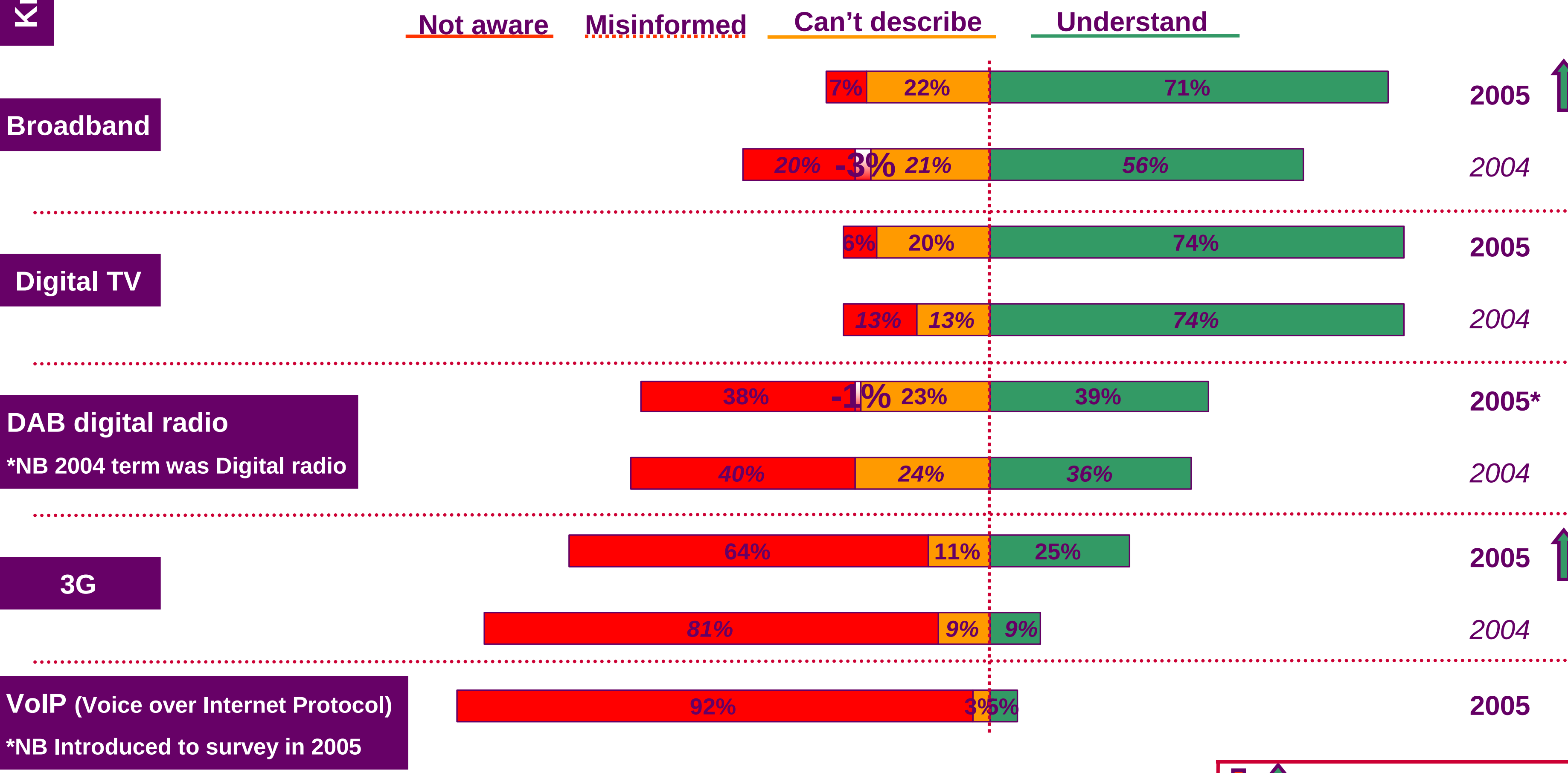
- Significant increases amongst consumers in Wales in awareness of the communications terms broadband and 3G
- The greatest increases since 2004 are amongst those consumers in low income households

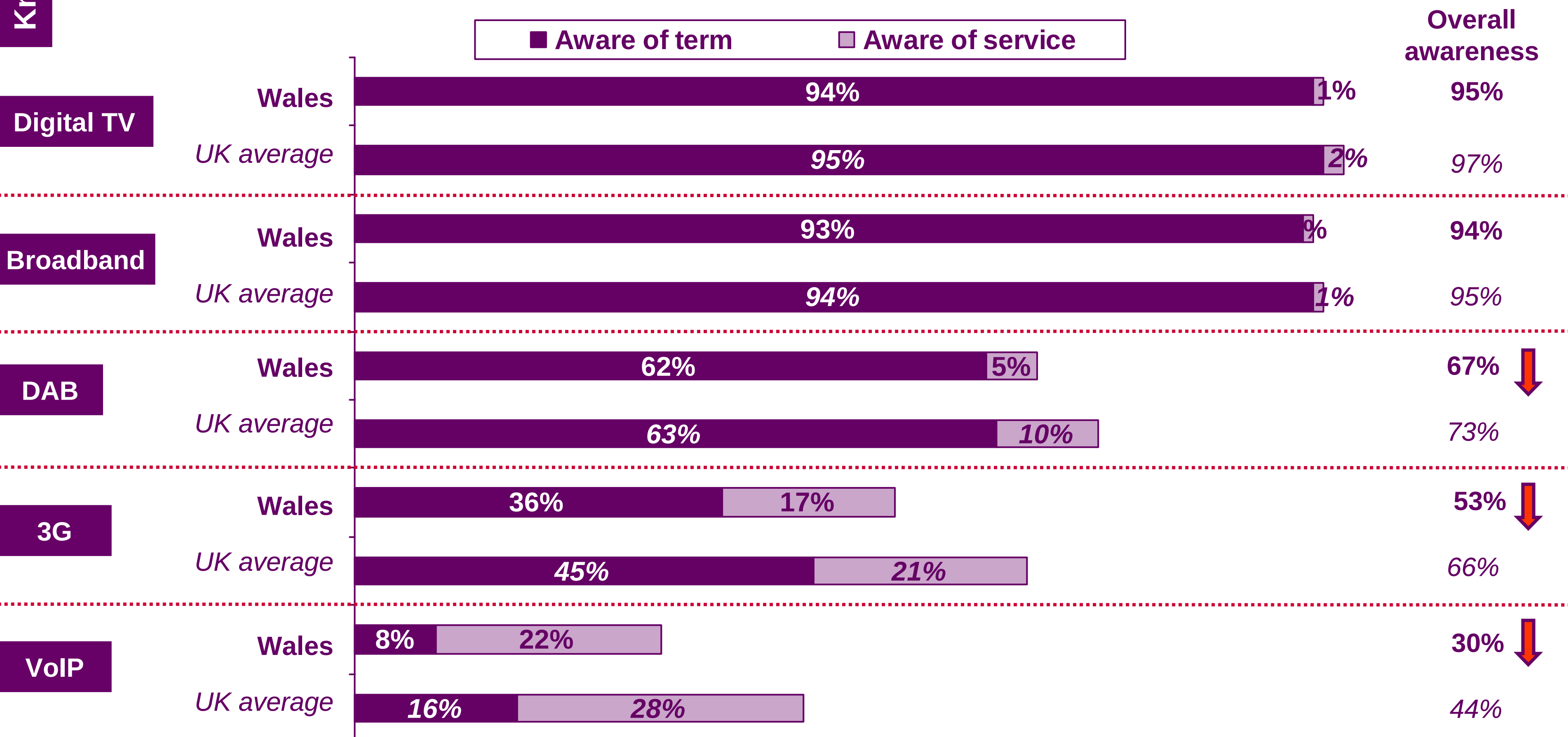


Indicates significantly lower or higher than **2004 Wales**

Base : All respondents in Wales 2005 (366) and 2004 (352)

Overall awareness of communication services - comparison to UK

- A significant proportion of consumers in Wales are aware of the capability of 3G and VoIP once they are read a description of what these services provide, but this is less evident for DAB digital radio
- The levels of overall awareness for DAB digital radio, 3G and VoIP are lower than for the UK as a whole



Indicates significantly lower or higher than **2005 UK average**

Base : All respondents in Wales (366) and UK overall (2,689)

Keeping informed about new developments - comparison to UK and change since 2004

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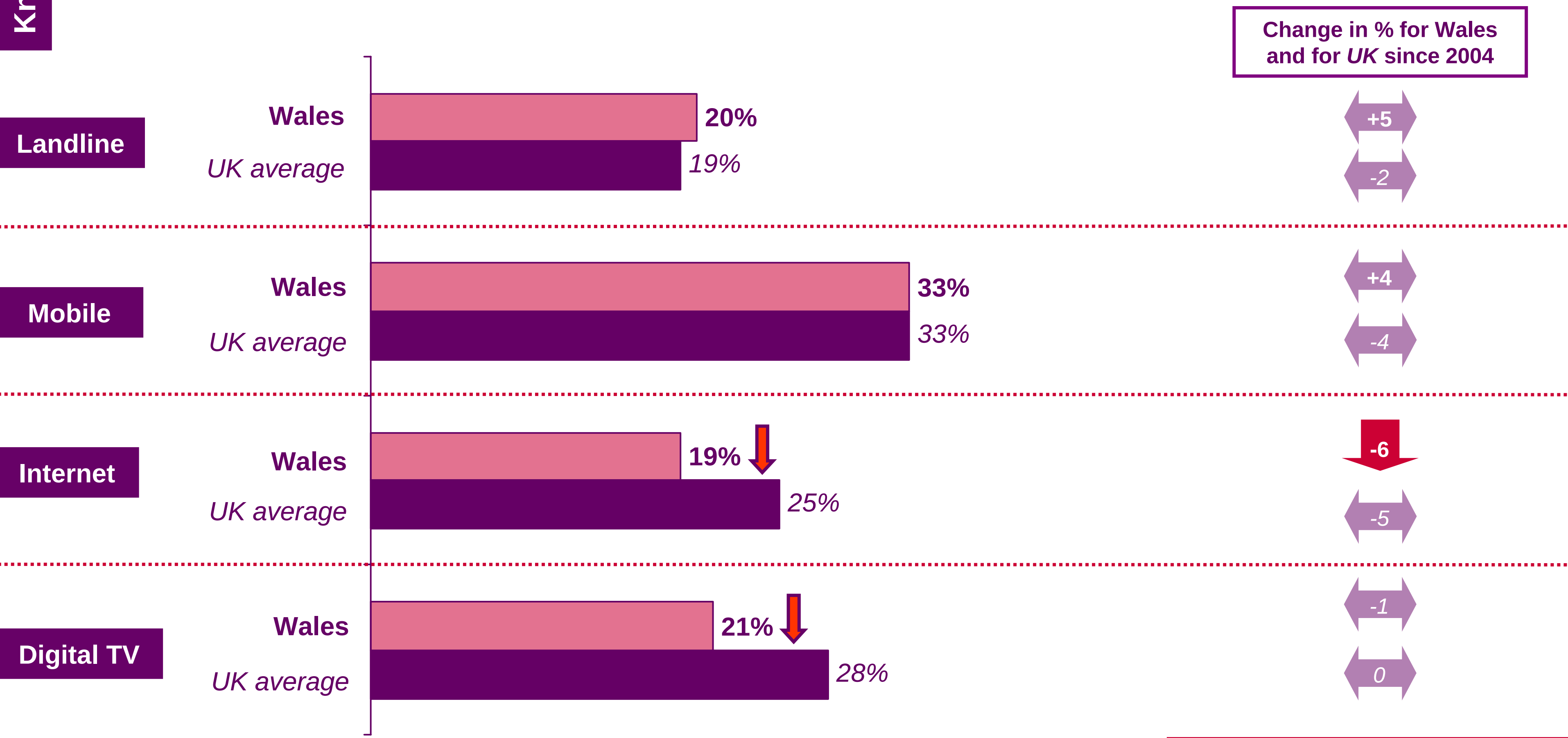
Knowledge

- Consumers in Wales are significantly less likely to keep themselves informed about developments for the internet and digital TV compared to the UK overall
- Compared to 2004, fewer consumers in Wales keep themselves informed about the internet



Indicates significantly lower or higher than **2005 UK average**

Base : All respondents in Wales (366) and UK overall (2,689)

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Keeping informed about new developments - comparison by age

Knowledge

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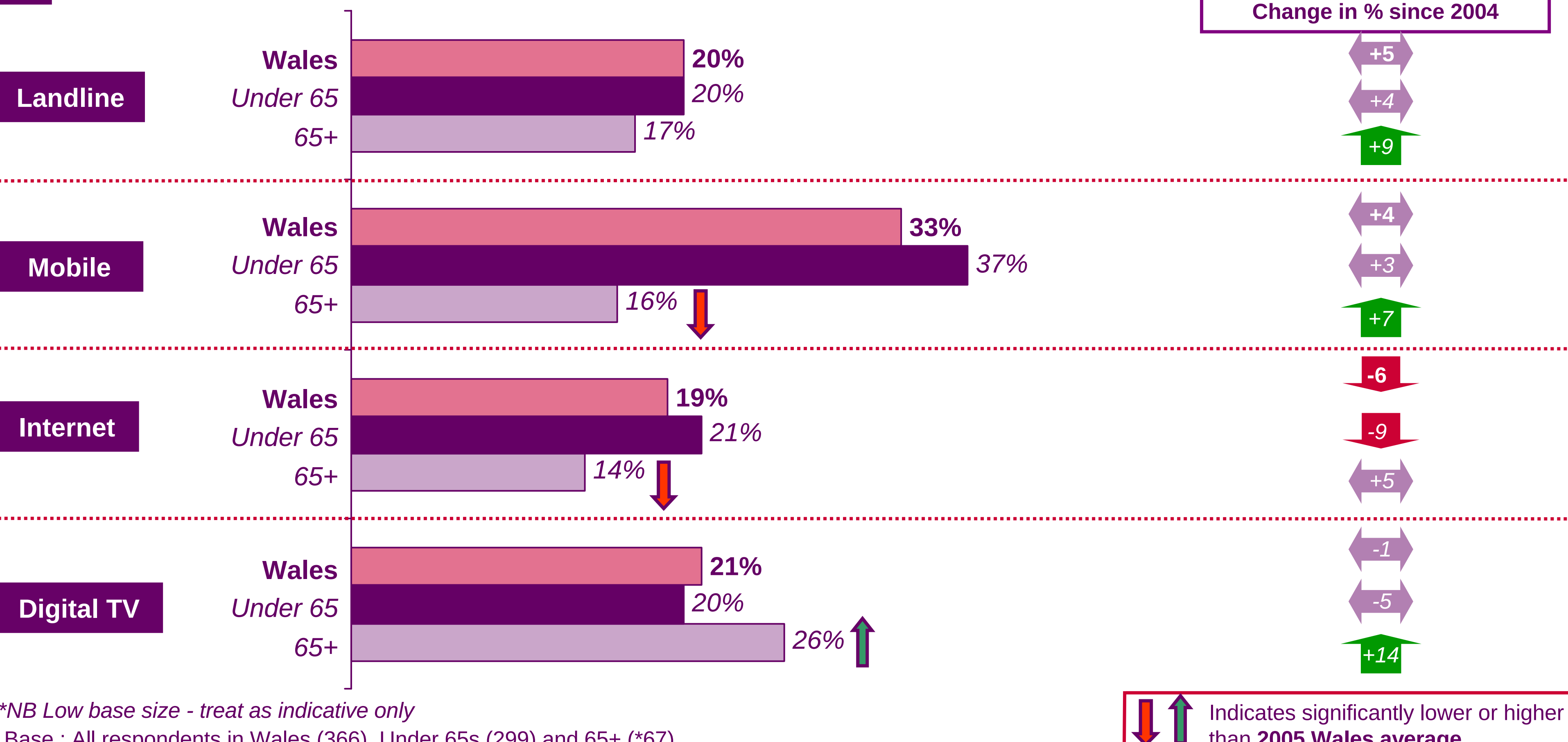
- Older consumers (aged 65 and over) in Wales are significantly more likely to keep themselves informed about ways of receiving TV channels compared to younger consumers (aged under 65) and Wales overall
- Since 2004, older consumers have shown significant improvement in keeping themselves informed about new developments for communication services, again in particular Digital TV



*NB Low base size - treat as indicative only

Base : All respondents in Wales (366), Under 65s (299) and 65+ (*67)

Sources of advice and information - comparison to UK and change since 2004

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Knowledge

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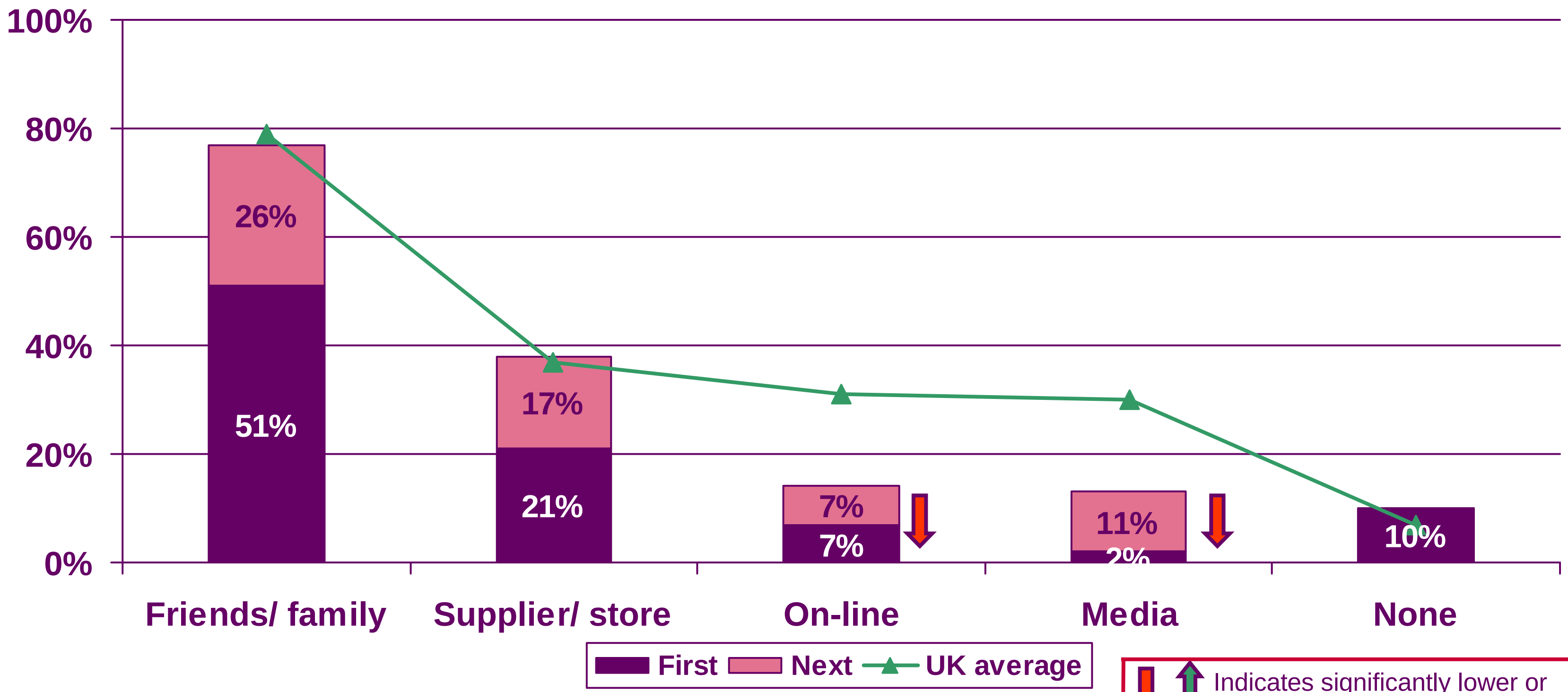
- Friends and family are the most popular source of advice and information on communications sources for consumers in Wales (despite a decrease in nominations compared to 2004), followed by suppliers/ stores selling the services
- Consumers in Wales are significantly less likely to nominate on-line and media sources of information than consumers across the UK as a whole

	Friends/ family	Supplier/ store	On-line	Media	None
Change in % since 2004 Wales	-8	-1	+1	-5	+3
Change in % since 2004 UK	*+10*	*-2*	*+9*	*-1*	*-1*



Indicates significantly lower or higher than **2005 UK average**

Base : All respondents in Wales (366) and UK overall (2,689)

Sources of advice and information - comparison by age

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Knowledge

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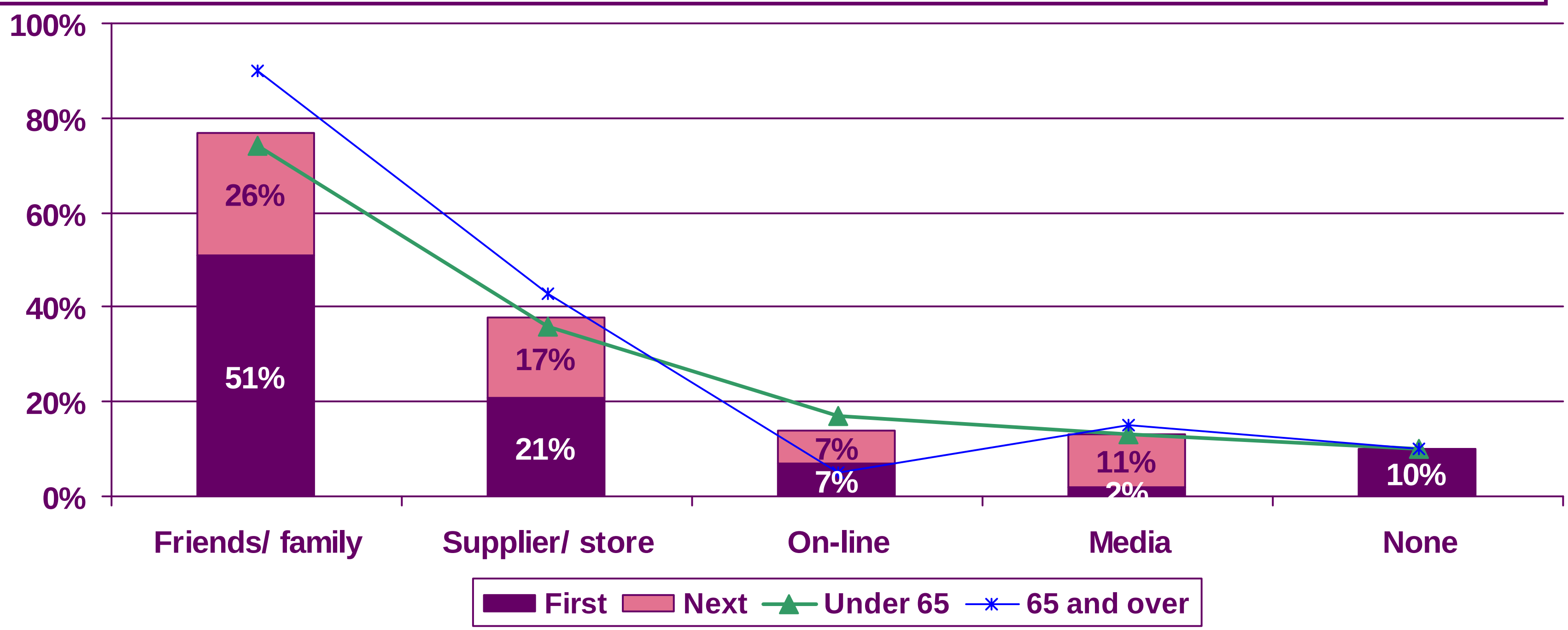
- Older consumers (aged 65 and over) in Wales are significantly more likely to nominate friends/ family and suppliers/ stores than younger consumers (aged under 65) and consumers across Wales as a whole
- Compared to 2004, older consumers are now just as likely to nominate any sources of advice or information as younger consumers in Wales

	Friends/ family	Supplier/ store	On-line	Media	None
Change in % since 2004 Wales	-8	-1	+1	-5	+3
Change in % since 2004 Under 65	-16	-9	+3	-6	+3
Change in % since 2004 65 and over	+24	+16	+3	+1	-11



Base : All respondents in Wales (366), Under 65s (299) and 65+ (*67)

**NB Low base size - treat as indicative only*

Ownership of different platforms - comparison to UK and change since 2004

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Ownership

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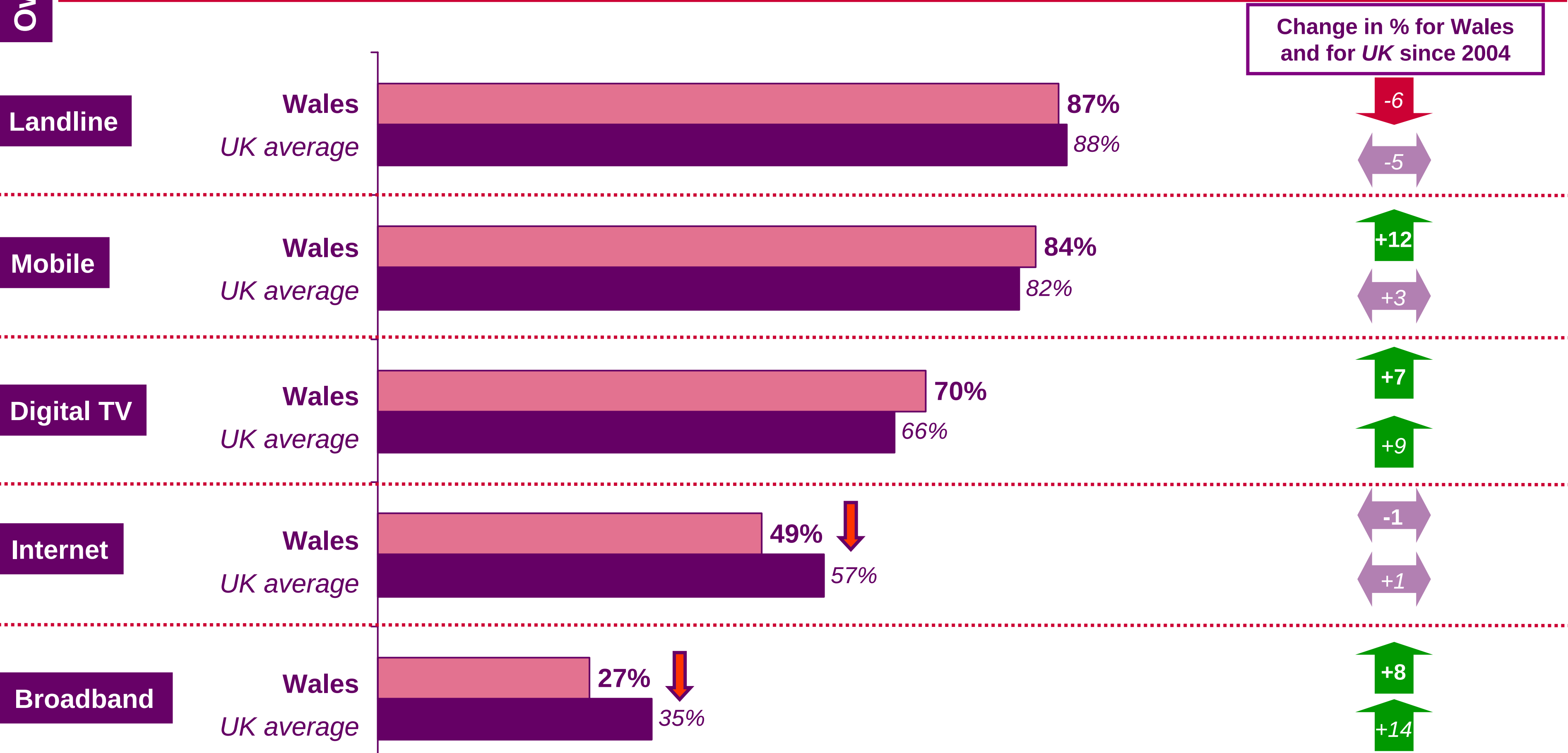
- Consumers in Wales are significantly less likely to have internet access at home, and to have broadband internet access at home than the UK average
- Ownership of mobile phones, digital TV and broadband access to the internet has increased significantly since 2004 amongst consumers in Wales, with a decrease in landline ownership. These changes are broadly similar to the UK measures, with the exception of mobile phone ownership.



Indicates significantly lower or higher than **2005 UK average**

Base : All respondents in Wales (366) and UK overall (2,689)

Multiple platform ownership - comparison to UK

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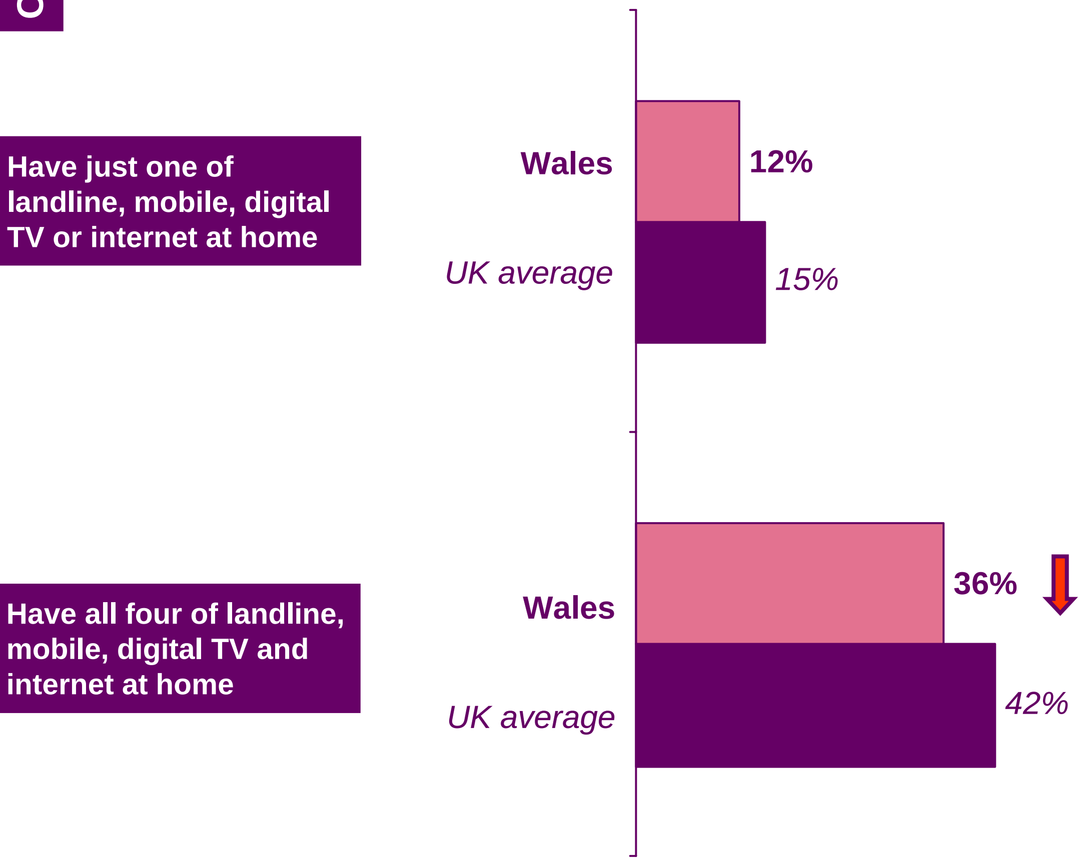
- One in ten consumers in Wales own just one of the four communications technologies (landline, mobile phone, digital TV or the internet)
- Owning all four of these types communications technology is significantly less common amongst consumers in Wales compared to the UK as a whole, due to lower ownership levels for the internet

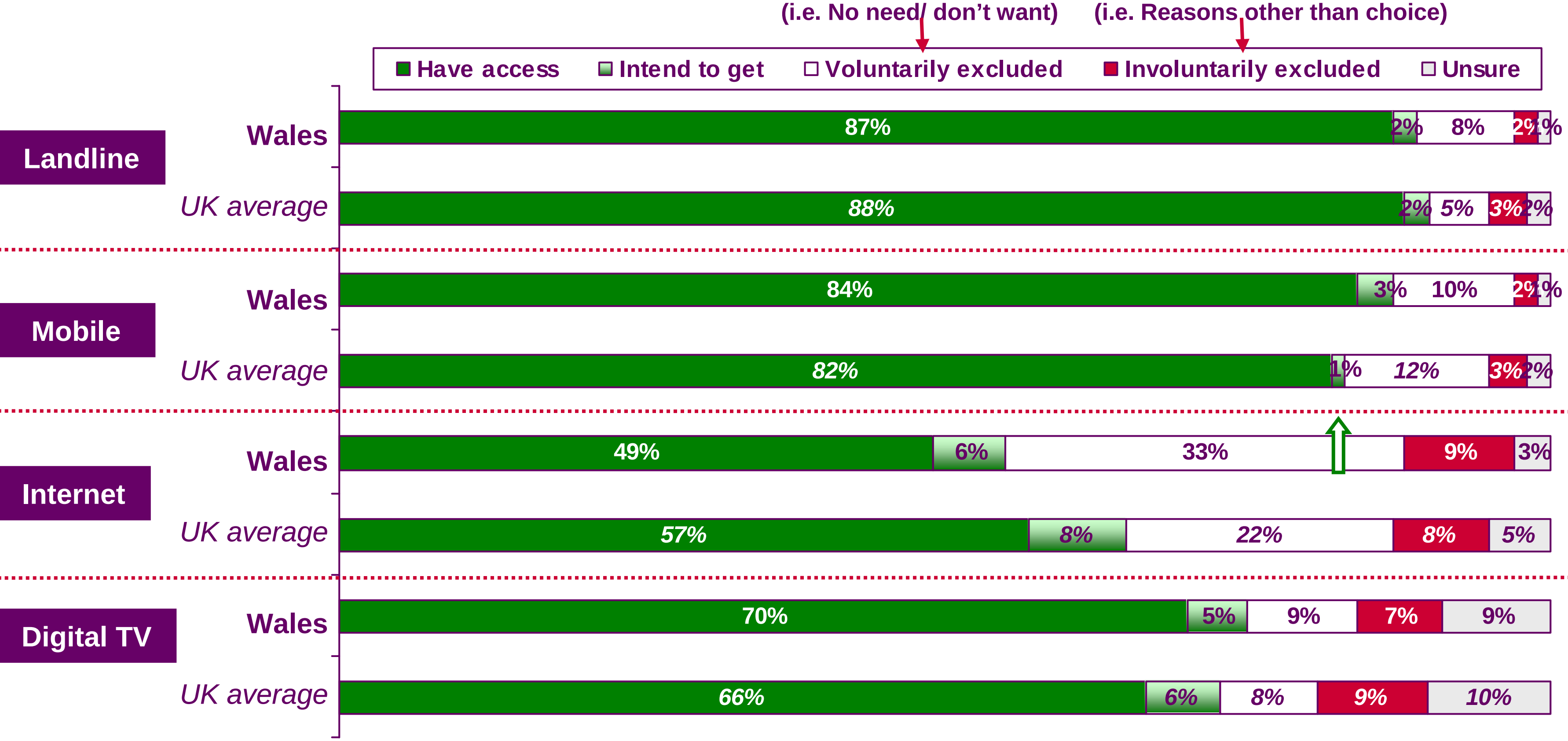


Indicates significantly lower or higher than **2005 UK average**

Base : All respondents in Wales (366) and UK overall (2,689)

Voluntary and involuntary exclusion – comparison to UK

- For each of the four communications technologies, involuntary exclusion is principally due to affordability (i.e. monthly charges, usage charges, cost of equipment)
- Consumers in Wales do not differ from the UK as a whole in terms of involuntary exclusion, but are significantly more likely to be voluntarily excluded from having the internet at home



Indicates significantly lower or higher than **2005 UK average**

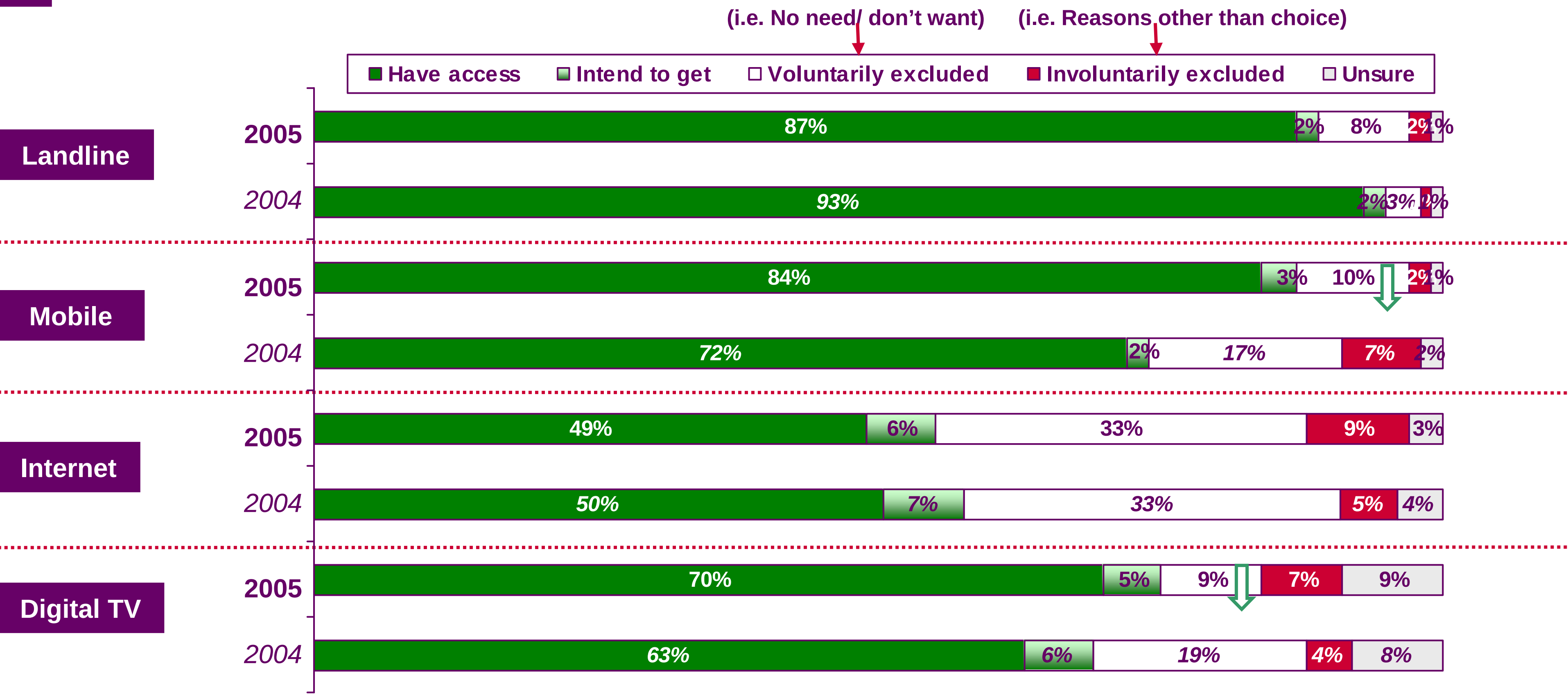
Base : All respondents in Wales (366) and UK overall (2,689)

Voluntary and involuntary exclusion – change since 2004

WALES

Ownership

- Compared to 2004 increased ownership of mobile phone and digital TV sees significant drop in the levels of voluntary exclusion for consumers in Wales due to increased ownership



Indicates significantly lower or higher than **2004 Wales**

Base : All respondents in Wales 2005 (366) and 2004 (352)

Usage

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Mobile phone uses - comparison to UK

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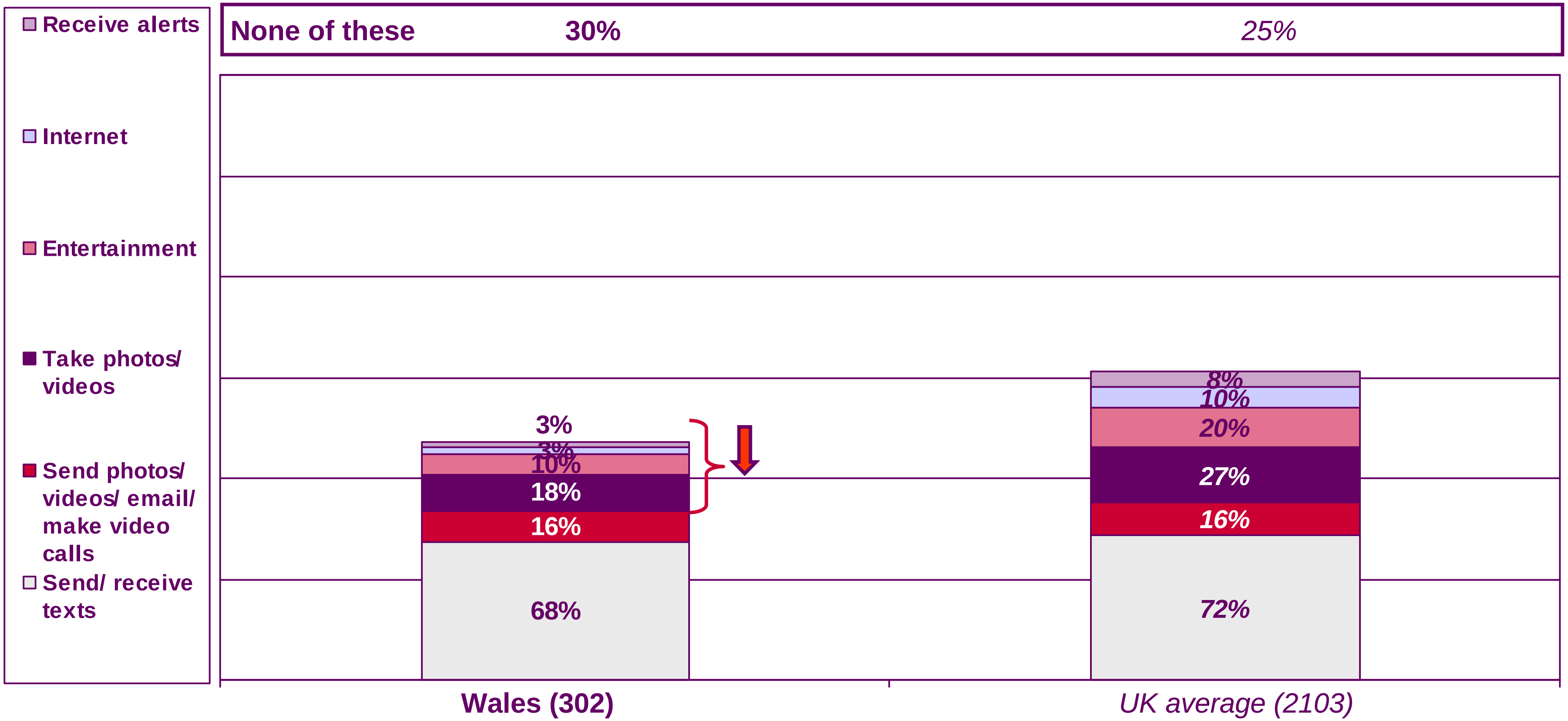
- Amongst consumers in Wales, a minority of mobile phone owners use their phone on a weekly basis for any of the uses shown beyond sending and receiving text messages, with close to one in three not making any of these uses on a weekly basis
- Compared to the UK average, mobile phone owners in Wales are significantly less likely make each of the uses of the phone except for sending photos and text messaging



Indicates significantly lower or higher than **2005 UK average**

Base : All who use a mobile phone

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Internet uses - comparison to UK

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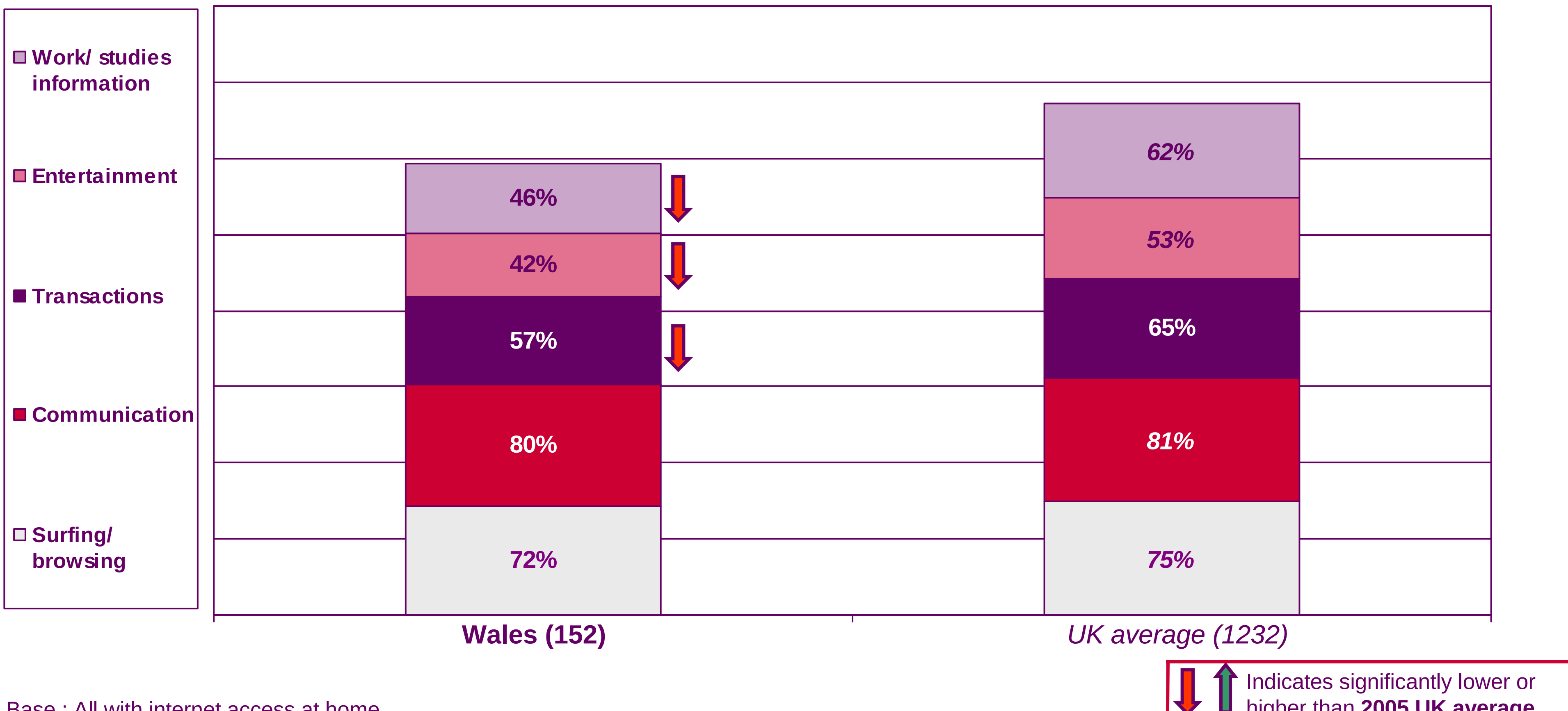
- Amongst consumers in Wales, those with internet access at home make a narrower use of the internet compared to the UK average, with lower use of the internet for transactions (e.g. banking, shopping online), entertainment (e.g. downloading, games, radio) and finding/ downloading information for work/ studies
- Findings for the UK show those with broadband access make more uses of the internet compared to those with dial-up access. There are insufficient interviews with dial-up users in Wales to make this comparison



Base : All with internet access at home

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Average monthly spend - comparison to UK

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Usage

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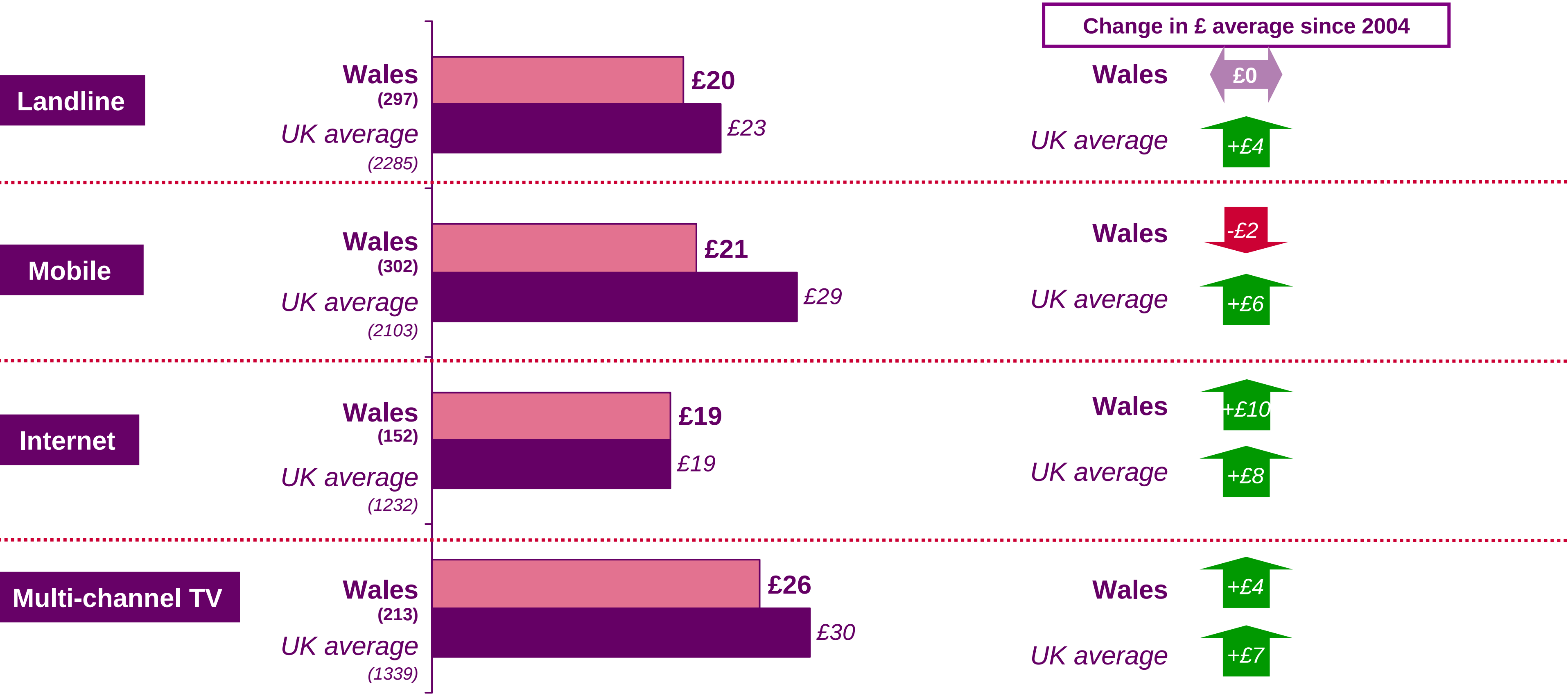
- Amongst owners in Wales the average self-reported monthly spend is broadly similar to the UK average, though appears lower for mobile phone
- Change in spend compared to 2004 is also similar to the UK average, again with the exception of mobile phone. The increase in internet spend is likely to have been affected by the increase in the use of broadband in Wales; with broadband users generally spending more than dial-up users.



Base : Owners of each type of device/ service

Concerns regarding services amongst owners

Landline (297)

29% have any concerns or worries (30% for UK)
- 16% costs
- 11% privacy (unsolicited calls)

Higher level of reported concerns amongst older people aged 65+

Increased from 17% with any concerns or worries in 2004

Mobile phone (302)

25% have any concerns or worries (31% for UK)
- 22% costs
- 5% choice/ access/ coverage

Higher level of reported concerns amongst younger owners & those not working

No real change from 23% with any concerns or worries in 2004

Internet (152)

32% have any concerns or worries (41% for UK)
- 22% spam/ pop-ups/ viruses/ control
- 14% security

Base too low to report on differences

Decreased from 43% with any concerns or worries in 2004

Digital TV (247)

15% have any concerns or worries (24% for UK)
- 9% costs
- 5% choice/ access
- 4% customer service

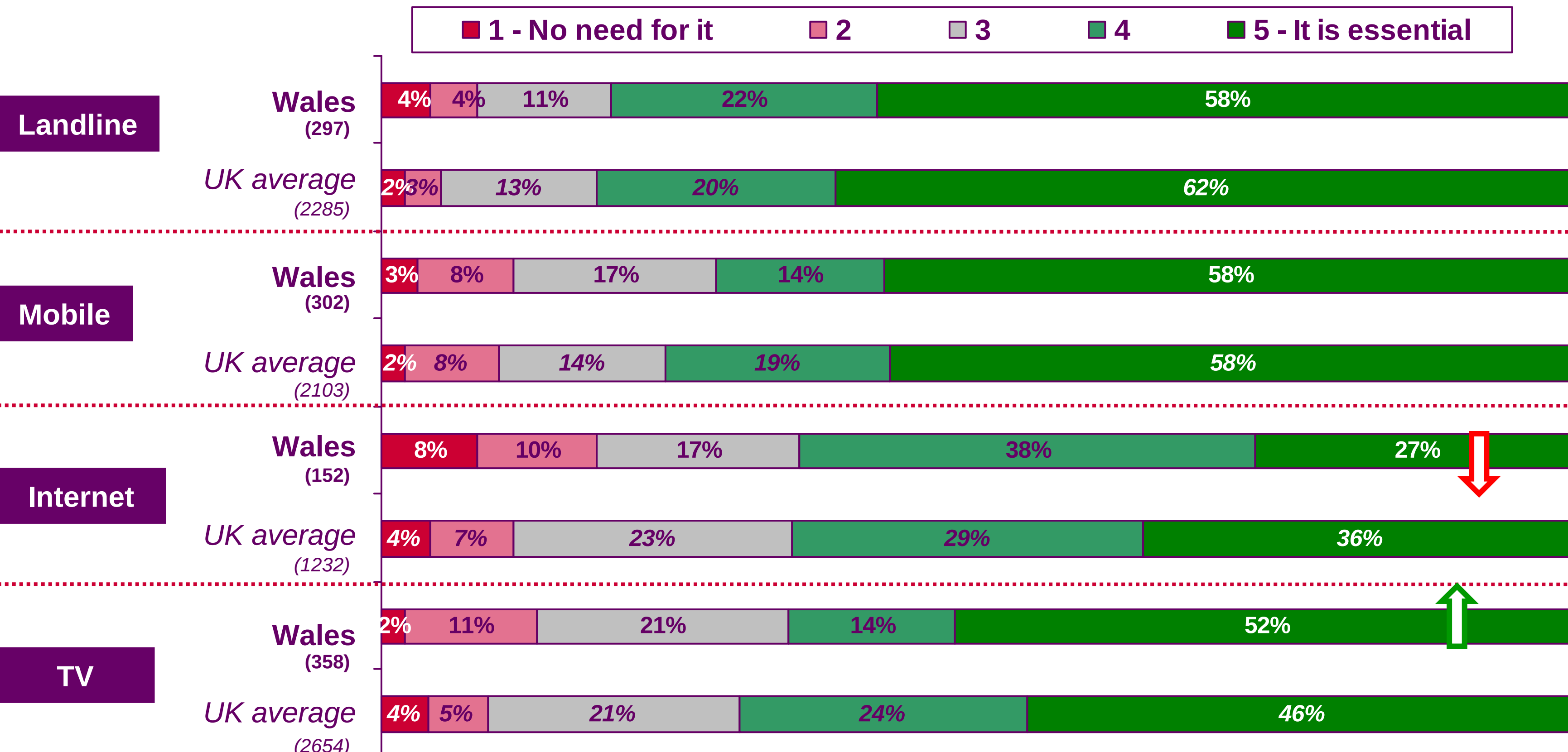
Little variation in level of reported concerns

No real change from 12% with any concerns or worries in 2004

Base: Owners of each type of device/ service

Importance of devices/ services owned – comparison to UK

- Amongst owners of each type of device/ service in Wales, landline and mobile phones are the most likely to be considered essential, with a minority of internet owners rating this service as being essential
- Compared to owners across the UK, those in Wales are more likely to consider their TV service to be essential and less likely to consider their internet service to be essential



Indicates significantly lower or higher than **2005 UK average**

Base: Owners of each type of device/ service

Attitudes

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Importance of devices/ services owned – change since 2004

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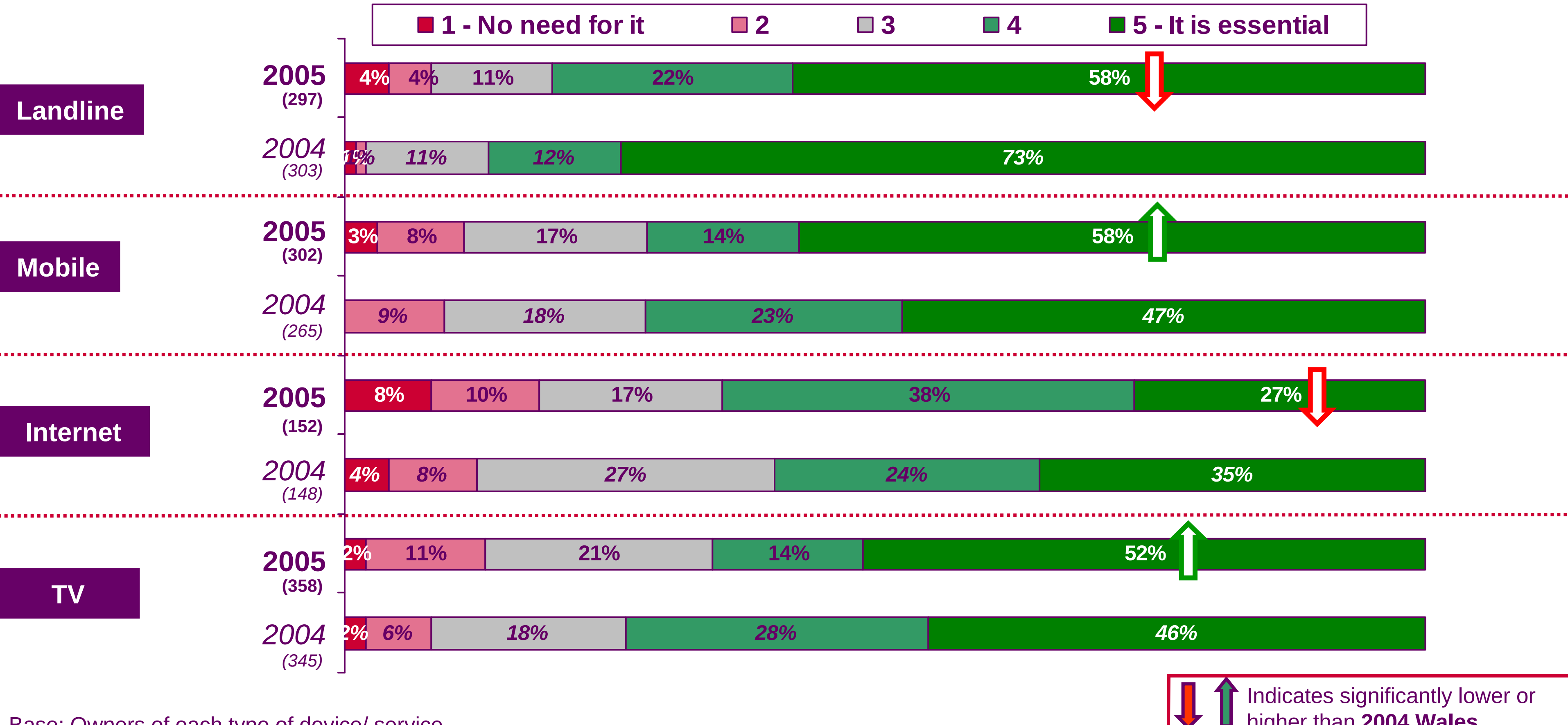
- Compared to 2004, owners in Wales are less likely to consider their landline service and internet service to be essential, and more likely to consider their mobile phone and TV service to be essential.
- Across the UK there has also been an increase in rating mobile phones as essential and a decrease in rating landline phones as essential, which is mirrored in Wales. The UK as a whole sees no change in the importance of the internet and TV services, and so Wales differs for these services.



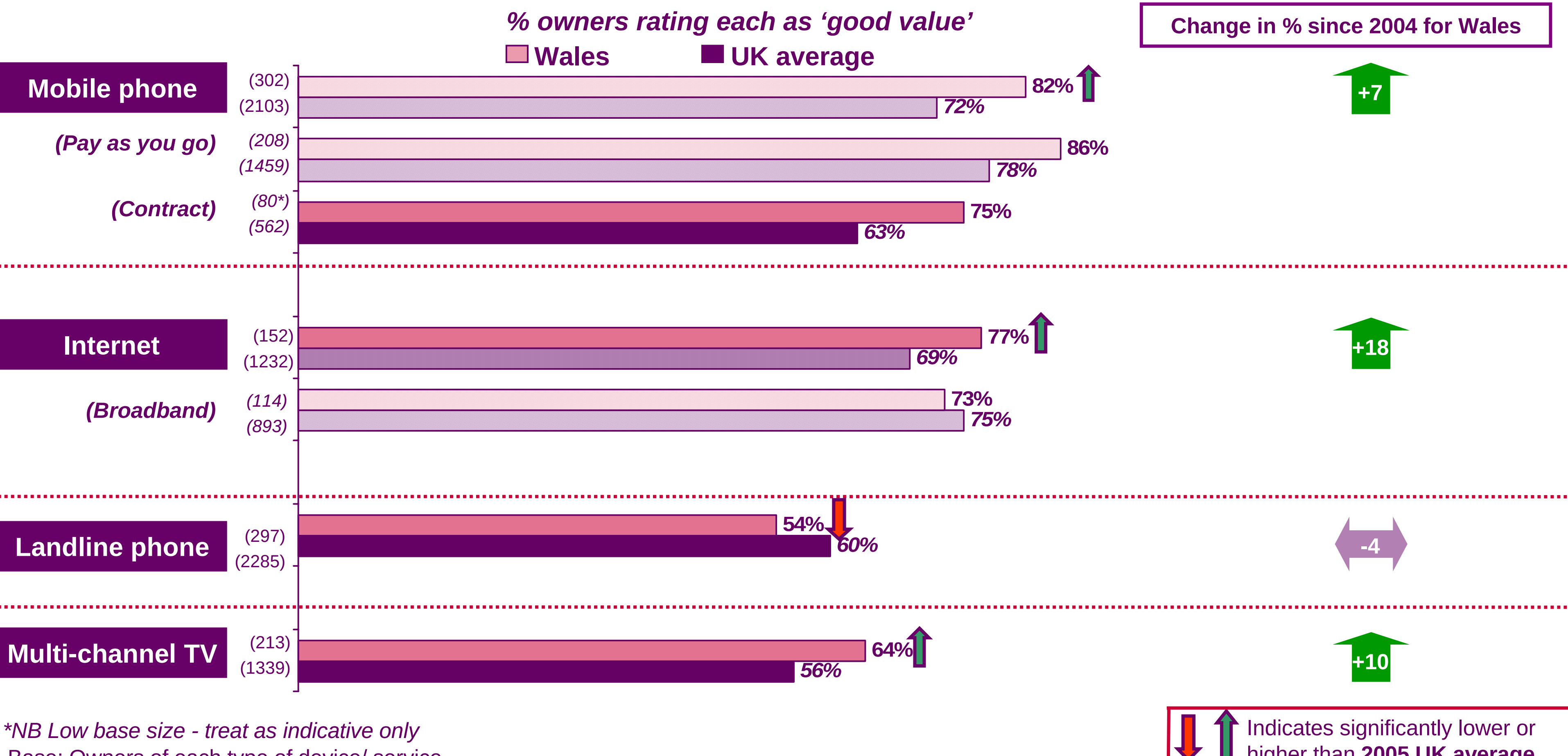
Base: Owners of each type of device/ service

Attitude towards value from services - comparison to UK and change since 2004

WALES

Attitudes

- The mobile phone service is most likely to be rated as providing good value by owners of each type of device/ service in Wales, and by more owners than the UK average, in particular those using pay as you go for their phone. Internet and TV services are also more likely to be rated as good value in Wales and see a significant increase since 2004, but landline phone service receive lower ratings for good value compared to the UK average



NB Low base size - treat as indicative only
Base: Owners of each type of device/ service

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Satisfaction with communications services and suppliers – comparison to UK

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Attitudes

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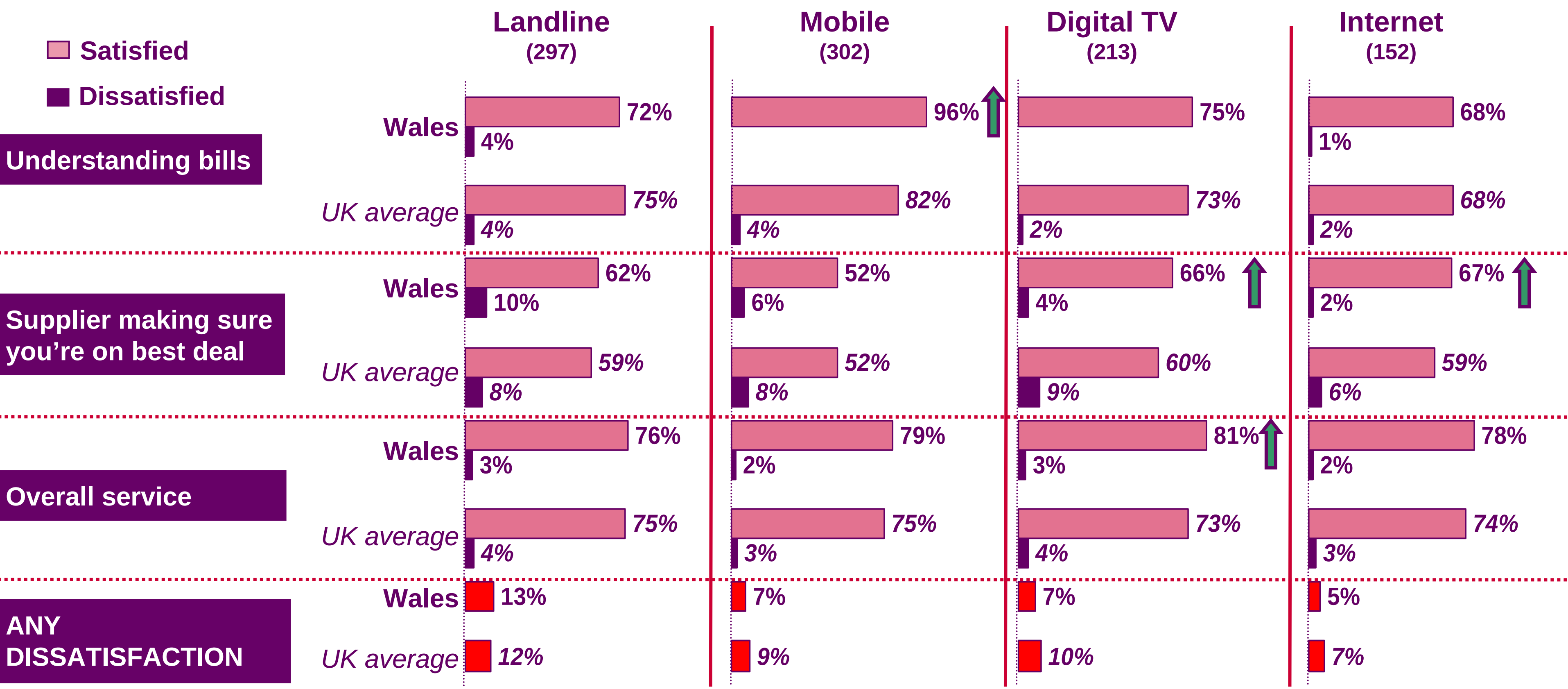
- Three quarters or more of owners of each type of service/ device in Wales are satisfied with the overall service provided, with relatively few dissatisfied
- Few aspects see higher satisfaction amongst those in Wales compared to the UK average, and a similar proportion are dissatisfied at all
- Lowest satisfaction regarding 'Your supplier making sure you are on the best of their deals for you', as for the UK overall



Indicates significantly lower or higher than **2005 UK average**

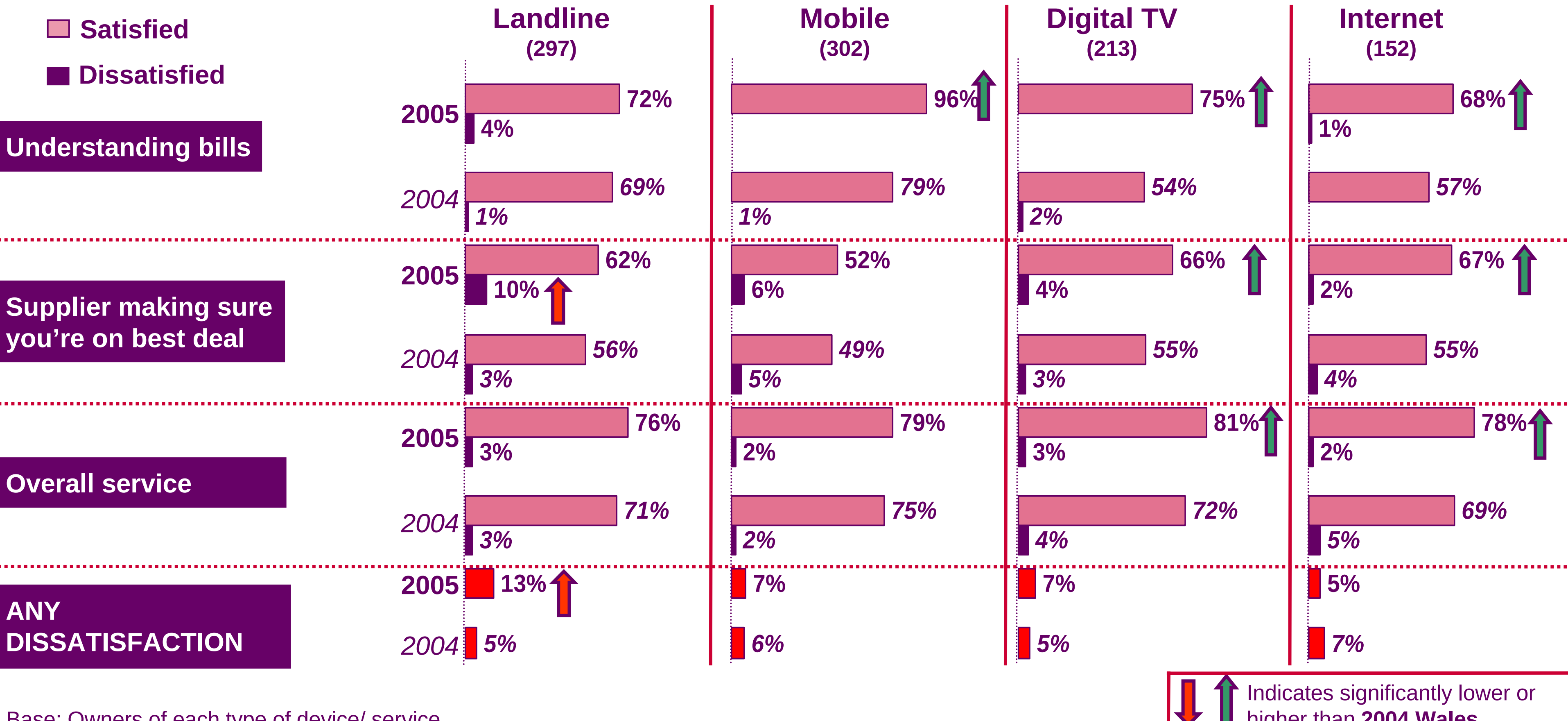
Base: Owners of each type of device/ service

Satisfaction with communications services and suppliers – change since 2004

WALES

Attitudes

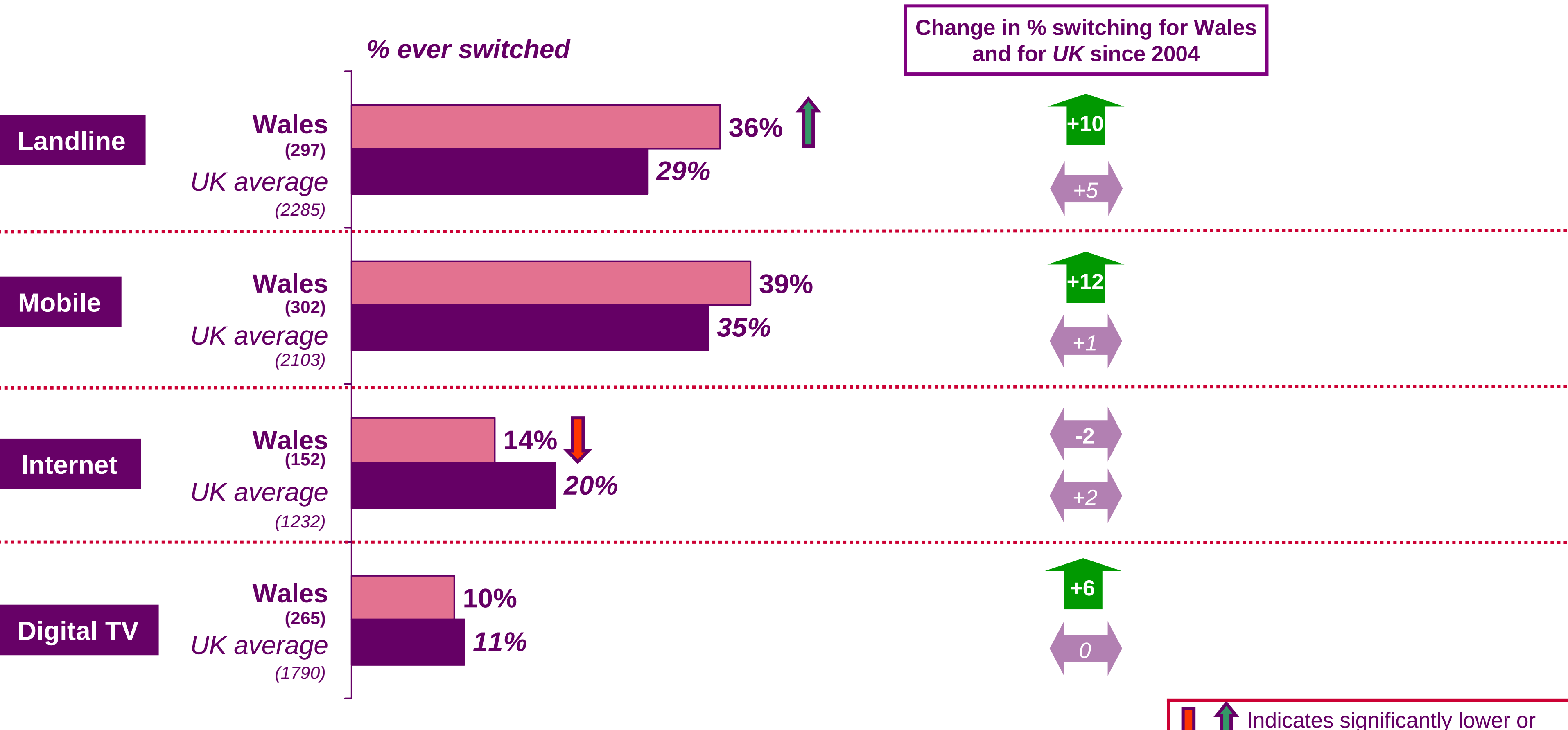
- Amongst consumers in Wales, services see an increase in satisfaction for 'Understanding bills' except landline phone, with the internet and digital TV services seeing an increase in satisfaction for each aspect covered. Landline phone services, however, see an overall increase in any dissatisfaction.
- Whilst '…making sure you are on the best of their deals for you' remains the lowest rated aspect, satisfaction has improved for TV and internet services



Base: Owners of each type of device/ service

Switching suppliers - comparison to UK and change since 2004

- Consumers in Wales are most likely to have ever switched suppliers for their mobile phone and landline phone services, as for the UK overall, and the incidence of having ever changed the company used for these telephony services has increased since 2004
- Experience of switching landline service supplier is higher in Wales, which switching internet service supplier is lower compared to the UK overall.



Base: Owners of each type of device/ service

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Mobile tariff checking to ensure best deal - comparison to UK

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Usage

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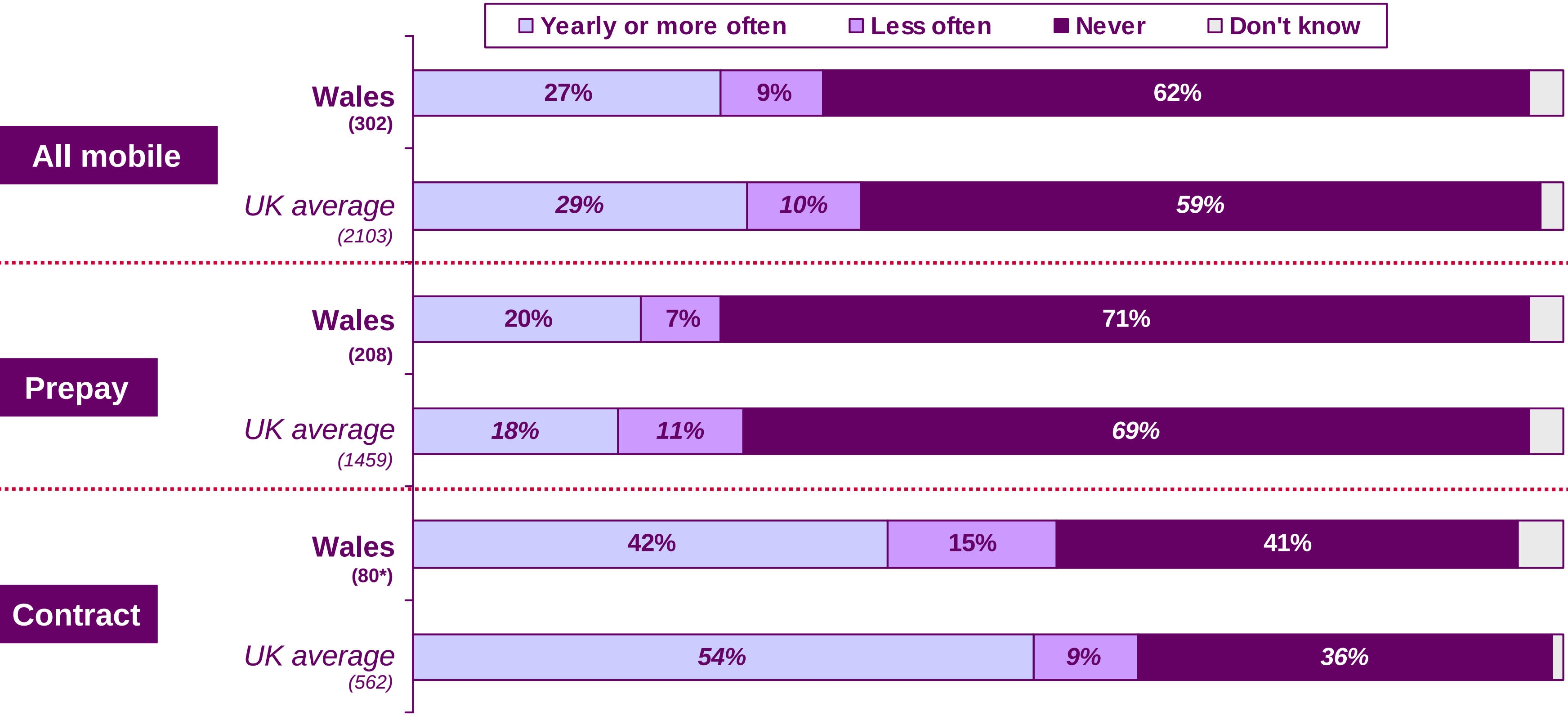
- A third of all consumers in Wales with a mobile phone ever check whether they are on the best tariff or deal, lower than the UK overall
- Those with a contract for their mobile phone are significantly more likely to ever check compared to pay as you go users



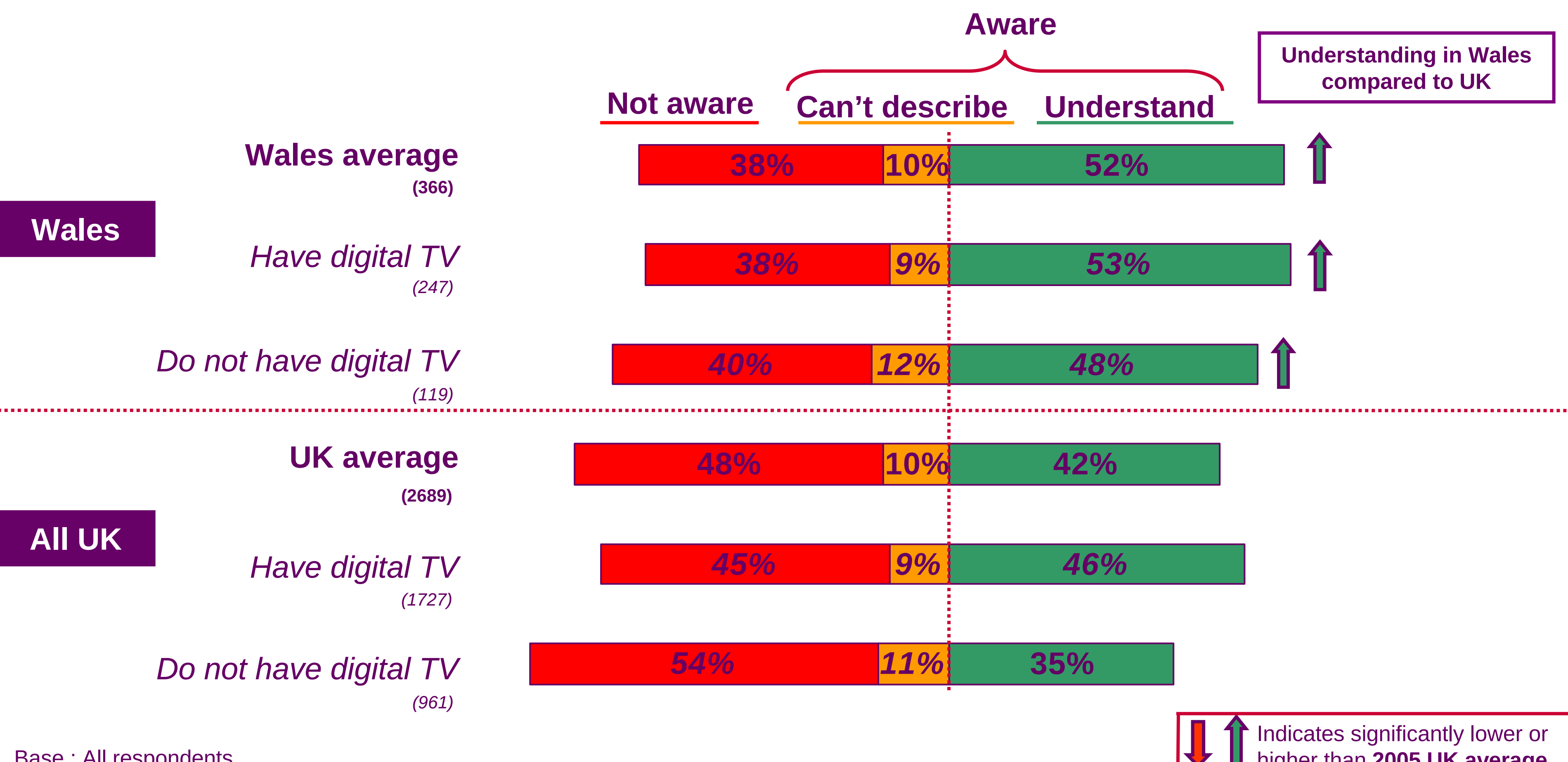
**NB Low base size – treat as indicative only*

Base: All who use a mobile phone

Indicates significantly lower or higher than **2005 UK average**

Awareness and understanding of Digital switchover - comparison to UK

- Half of all consumers in Wales have heard the term digital switchover and are able to describe what the tern refers to (‘Understand’), this measure exceeding the UK average
- In Wales, unlike the UK overall, a similar proportion of those with and without digital TV are aware of digital switchover



Base : All respondents

Awareness and understanding of Digital switchover - change since 2004

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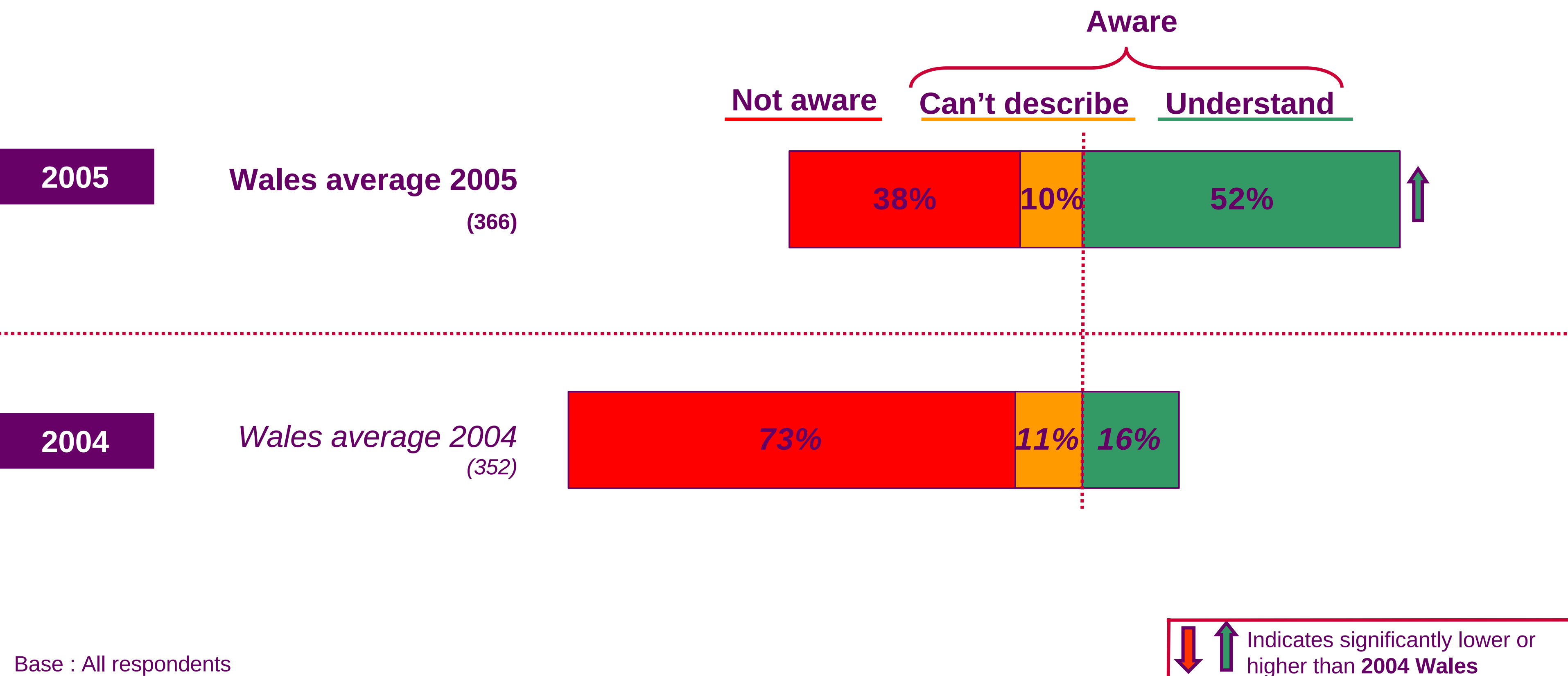
- Understanding of the term digital switchover has increased significantly amongst consumers in Wales compared to 2004; rising by 36% to account for 52% of all consumers in Wales
- Understanding is lower amongst consumers in Wales in low income households



Base : All respondents