## APRIL 2014

# Panel bulletin

## Communications Consumer Panel Work Plan 2014/15

Following a public consultation, the Communications Consumer Panel has published its work plan for 2014/15.

Panel Chair Jo Connell expressed her thanks to stakeholders for their comments on the Plan, noting that these had played an important role in helping the Panel to shape its work programme for the coming year. The work plan explains the Panel's role, describes the different ways in which the Panel engages with issues, explains how we have chosen our priorities for the year and sets out the areas that we propose to address.

The Panel's key areas of engagement for the year are:

➢ Nuisance calls
➢ Mobile and broadband coverage and quality of experience
➢ Customer Service and complaints
➢ Privacy and security of personal data
➢ Effective digital engagement

You can read the work plan here.

## Panel Attends Ofcom's Speaking EPG roundtable

Panel member, Mairi Macleod, led a discussion at a recent Ofcom organised roundtable to discuss the value of Electronic Programme Guides (EPGs). The event was also attended by blind and visually-impaired TV viewers and TV service providers Sky, Virgin, Talk Talk, BT TV, Freeview and Freesat.

Participants demonstrated the value of those speaking EPGs that are already available, and discussed the difficulties they encountered with conventional EPGs. The use of programme guide apps on mobile devices equipped to voice text was also shown.

Welcoming the opportunity for users and EPG providers to meet and talk directly, Mairi noted that talking EPGs would make a difference to many people's lives. She added that those products designed with accessibility in mind from the start could also benefit everyone in society, which would have the added benefit of reducing the cost.

The roundtable is the first step in a process Ofcom has begun to investigate whether it would be helpful and feasible for TV service providers to offer speaking EPGs.

## Tablets help drive increase in older people going online

New Ofcom research reveals that the number of people aged 65 and over accessing the internet has risen by more than a quarter in the past year, driven by a three-fold increase in the use of tablet computers to go online.

This has helped to drive overall internet use up from 79% of adults in 2012 to 83% in 2013, according to Ofcom's Adults' Media Use and Attitudes Report.

The proportion of people aged over 65 that are accessing the web reached 42% in 2013, up nine percentage points from 33% in 2012, which is a 27% increase over the year. One reason for this is an increase in the use of tablet computers by older people aged 65-74 to go online, up from 5% in 2012 to 17% in 2013.

Nearly all adults under 35 years old now go online (98%). The increase in internet use was driven by three different age-groups: 25-34s (98%, up from 92% in 2012), 45-54s (91%, up from 84%), and, most notably, those over 65.

Older people spend significantly less time surfing the web than younger people (16-24 year olds), who on average spend more than a whole day (24 hours 12 minutes) each week online. UK adult internet users spend an estimated average 16 hours 54 minutes online each week, which compares to an average 9 hours 12 minutes online per week among those over 65.

Those over 65 are significantly less likely than all internet users to do a range of online activities, including banking online (35% versus 61%), watching or downloading TV programmes or films (25% versus 40%) and visiting social network sites or apps (30% versus 68%).

A summary of the report can be found here.

## Ofcom publishes Annual Plan

Ofcom has published its Annual Plan for 2014/15. Ofcom has placed its annual priorities into the following categories:

➢ Promote effective competition and informed choice.
➢ Secure optimal use of spectrum.
➢ Promote opportunities to participate.
➢ Protect consumers from harm.
➢ Maintain audience confidence in broadcast content.

➢ Contribute to and implement public policy defined by Parliament.

You can read the full Plan at Ofcom Annual Plan

## Next Generation Text (NGT) Relay service - launch delayed

BT has informed the Panel and ACOD that it has had to delay the launch of the Next Generation Text (NGT) Relay service this month, because of a safety issue. This news is extremely disappointing, but we understand that this is not a decision that BT has taken lightly.

Recent final testing of the new NGT Service revealed a problem with the quality of emergency calls that could have put users at risk. Work is continuing to understand the issue, including live call testing with help from the Text Relay user base. BT has stated that undertaking this user testing with as extensive a mix of end-user equipment and originating network is critical. It continues to welcome interested parties that would like to make calls using the test version of the downloadable NGT app. Interest can be expressed at http://ngts.org.uk/trial_index.php

BT have therefore postponed the launch of the new app, stressing that it is doing all it can to understand the underlying issues so the new service can be launched as soon as possible.

The existing service will continue to serve customers until the launch of Next Generation Text Relay.

Ofcom have issued a statement as follows: "In response to the delay to the launch of the Next Generation Text Relay Service, Claudio Pollack, Ofcom's consumer director said:

"Ofcom is very disappointed that a Next Generation Text Relay service, developed by BT, will now not be launched this Friday – a long-standing deadline set by Ofcom 18 months ago. The rules put in place by Ofcom to protect the interests of disabled consumers require that a next generation text relay service must be made available by all landline and mobile providers from 18 April 2014.

"BT informed Ofcom this week that testing has revealed technical problems relating to the connection of emergency calls. Access to emergency calls is a critical factor underpinning Ofcom's approval of any Next Generation Text Relay service.

"Our first priority is to ensure that BT, with any necessary co-operation from the rest of industry, does what is needed to deliver a fully operational service as soon as possible. We will also investigate the circumstances behind the delay."

## Ofcom publishes first results on quality of TV subtitles

Ofcom has published its first report on the quality of live TV subtitles provided by broadcasters in the UK.

Subtitles are used by over a million people with hearing impairments to watch TV. Addressing concerns from viewers, Ofcom last year required broadcasters to start reporting on the quality of live subtitles to identify areas for improvement.

The report samples the accuracy, speed and latency – the delay between speech and the corresponding subtitle appearing – of live TV subtitles. It is the first of four reports on live subtitling Ofcom is producing over a two-year period.

Viewers have told Ofcom that poor latency is one of the most frustrating aspects of live subtitling, often resulting in a disjointed viewing experience.

Samples of BBC, ITV, Channel 4, Channel 5 and Sky programmes showed that the median latency was 5.6 seconds, which exceeds the recommended guideline of a maximum 3 seconds delay.

Ofcom will ask broadcasters to consider how latency can be reduced and whether, for example, they can take advantage of any small delays in the transmission of live programmes to improve latency.

The speed of subtitling (words per minute displayed on screen) can also impact the viewing experience.

The subtitles sampled met the current guidelines for a maximum speed of 160-180 words per minute. Ofcom will review these guidelines in light of the data gathered over the four reports to see if they are appropriate for viewers.

Accuracy, another key measure, was rated as generally good by researchers that audited the data on behalf of Ofcom. They consider that 98% of subtitled words being accurate on live programmes is an acceptable standard.

A summary of the report can be found here

## Realising consumer rights – From JFK to the digital age

This paper from Consumer Futures attempts to start to address the broader questions around the future for consumer empowerment in the digitally driven age. Its analysis draws on first hand research and testing of new forms of digital consumer empowerment that we carried out between 2011 and 2013, plus secondary sources of data on trends and impacts. Read more at: http://www.consumerfutures.org.uk/files/2014/03/Realising-consumer-rights.pdf

## Broadband speeds continue to increase but the UK-wide picture is uneven

The proportion of superfast connections – those offering headline speeds of 30Mbit/s or more – has risen from 5% in November 2011 to 25% in November 2013. The average superfast connection speed has also continued to rise, reaching 47.0Mbit/s by November 2013 – an increase of 47%, or 15.1Mbit/s since May 2010.

Ofcom's tenth report measuring consumers' actual broadband connection speeds, suggests that one in four UK residential fixed broadband connections is 'superfast'.

The latest research reveals that at 17.8Mbit/s, the average actual fixed-line residential broadband speed in the UK is almost five times faster than it was five years ago when Ofcom first began publishing the data (up from 3.6Mbit/s in November 2008).

While the growth in average speeds shows that investment in broadband technology is delivering benefits for most consumers, the UK picture is uneven. A significant number of households, especially those in rural areas, can experience considerably slower speeds.

One key reason for the slower speeds in rural areas is the limited availability of superfast broadband services. In addition, broadband speeds over ADSL, a technology that uses the copper wire telephone network, are generally slower in rural areas because of the longer distances to the telephone exchange. However, problems with slower broadband speeds are not just confined to rural communities but can also affect urban areas. Ofcom intends to publish research into the important issue of urban broadband variability during the course of this year and will seek to explore with operators any barriers to roll out of higher speed services.

An overview of the research along with the Ofcom's full report can be found here.

## Government launches Digital Inclusion Strategy

The Cabinet Office has launched a Digital Inclusion Strategy that aims to get 2.7million more people online in the next 2 years. It notes that the internet has transformed almost every aspect of public, private and work life. It underpins our economy, changing the way every workplace communicates. It is reshaping government through simpler, clearer, faster public services. However, BBC research found that 21% of people lack the basic digital skills they need to benefit from the internet. Lloyds Bank revealed last month, in its UK Business Digital Index, that half of small and medium-sized enterprises (SMEs) and voluntary and community social enterprise organisations (VCSEs) do not have a website.

As part of the Strategy, a new UK Digital Inclusion Charter has also been published. The charter brings together 40 organisations from all sectors who are committed to reducing the number of people who are offline by 25% by 2016, and a further 25% every 2 years after that.

## The UK Spectrum Strategy

The Department for Culture Media & Sport has published its new Spectrum Strategy that sets out how it plans to meet the demands of the use of spectrum over the next decade and double spectrum's contribution to the UK economy.

The government's vision is for use of spectrum to double its annual contribution to the economy by 2025 through offering business the access it needs to innovate and grow.

You can read the strategy at: https://www.gov.uk/government/publications/spectrum-strategy

## Ofcom publishes spectrum blueprint for the next decade

Ofcom has published a plan to enable the UK to meet the growing demands placed on its wireless infrastructure over the next decade.

The Spectrum Management Strategy sets out Ofcom's strategic approach and priorities for managing radio spectrum, which underpins all wireless services.

Applications that use this invisible but valuable resource include: mobile phones and tablets, TV and radio broadcasting, communications for the emergency services, aeronautical communications, wireless cameras, microphones, smart-meters and wearable communications devices.

This work complements the Government's aim to double the contribution that spectrum services make to the UK economy to £100bn a year by 2025.

Ofcom has also published its approach to spectrum sharing to promote further innovation and the efficient use of this valuable resource. Ofcom is already supporting trials of 'white space' technology, a new concept that allows spectrum sharing and which can be used in a wide range of fields such as transport, energy, healthcare and agriculture.

The Spectrum Management Strategy has examined approaches to enable use of sharing by a wide range of sectors. As the intensity of spectrum use increases, with greater levels of sharing between different uses, managing the co-existence between services will become more important. Ofcom plans to meet this challenge in the following ways:

➢ exploring opportunities for new types of spectrum sharing;
➢ managing the co-existence of different services and by promoting technology improvements that minimise interference;
➢ providing more information on how spectrum is used in the UK. As part of this, Ofcom has published today an interactive spectrum map providing easy-to-access details on how different frequencies are used in the UK; and
➢ leading discussions on international spectrum issues.

### Six priorities for spectrum management

Ofcom has identified six priority areas for future spectrum use. They are:
1. Future mobile data demands: Ofcom will consider the potential impact these demands have on other users of spectrum. Ofcom will also contribute to international decisions; examine in detail the case for using more spectrum for mobile data, support improvements in mobile coverage and monitor developments towards 5G technology.

**2. The future of the 700MHz band and free-to-view TV:** Ofcom is investigating the potential to rearrange the bands used for digital terrestrial TV. This could release more of this prime spectrum for mobile broadband use sometime after 2018, while ensuring that viewers would continue to benefit from digital terrestrial TV.

**3. Public sector spectrum release:** Ofcom will support the Government in achieving its target to release 500 MHz of spectrum from the public sector. A first step will be the release of spectrum at 2.3 and 3.4 GHz, currently held by the Ministry of Defence.

**4. Programme Making and Special Events:** Ofcom is working with PMSE stakeholders to understand their current and future spectrum demands for wireless microphones and cameras.

**5. Machine-to-Machine applications:** Ofcom has started work to understand the implications of the expected growth in M2M. Enabling licence exempt access to the 870-915 MHz band is a first step towards ensuring spectrum availability to support innovation in this area. The UK is among the first countries globally to release spectrum that can support M2M communications.

**6. The emergency services:** Ofcom will support the Government is assessing how best to deliver the wireless communications needs of the emergency services over the long term.

In the UK, half of all adults own a smartphone and one in four households has a tablet computer, fuelling a surge in demand for more data capacity. Research commissioned by Ofcom found that by 2022 over 350 million additional devices in the UK – including cars, crop sensors and washing machines – are also likely be connected to the internet, many using tiny slivers of spectrum.

To help meet this demand and building on the existing work to open up TV white spaces for use by a range of innovative services, Ofcom has identified three key areas where spectrum sharing can play an important role:

➢ *for indoor use*: by continuing to provide high speed wireless network connectivity to ensure that consumers can fully benefit from the increasing availability of superfast broadband;
➢ *for outdoor use*: by increasing the supply of spectrum for use by a growing number of small mobile broadband cells, which are being deployed to help meet the growth in demand for mobile data capacity driven by the increasing use of smartphones and tablets; and for
➢ *the internet of things (IoT) use*: by helping provide the spectrum needed to support growth and innovation in the emerging IoT sector, which is set to see hundreds of millions of devices become wirelessly interconnected by the end of the decade. These new services have the potential to provide benefits across a wide range of sectors, including healthcare, energy distribution, transport and agriculture.

The Ofcom Spectrum Management Strategy can be found here. A Statement on Spectrum Sharing can be found here.

## "Broad but low" - a report on consumer experiences with the broadband market

In March, Consumer Futures published a new research report, "Broad but low", (PDF) which examines consumer experiences with the broadband market.

The aim of the research was to understand the level of consumer satisfaction with the broadband market as well as to look the potential role innovative intermediary services can play to drive consumer engagement and increase consumer satisfaction with this essential utility.

## Online data economy value chain - new report

Ofcom has published a new report commissioned from Analysys Mason examining the role of online user data in five sectors: the online, audio-visual, fixed and mobile telecommunications, and postal sectors. The report focuses on the principal ways in which online user data is used in these sectors, how it is contributing to growth, and what factors may support or hinder the further development of user-data business models.

UK citizens and consumers are using online services for a wide range of daily activities, accessed through internet enabled devices.

In consuming and interacting online, people routinely provide information about themselves, for instance by registering for a service, making online purchases or simply interacting with webpages. This vast amount of data is considered commercially valuable and its usage underpins the emergence of innovative new business models.

Read more at Online Data Economy

## Missing the mark: Consumers, energy bills, annual statements and behaviour change

This Consumer Futures research seeks to understand whether additional information on energy consumption or cheapest tariffs would be likely to engage consumers. In particular, it wanted to test the reactions of consumers across all demographic, economic and social groupings to see what impact this information would have. Research found that policy makers should be wary of relying on bills as the sole way to inspire behavioural changes among energy consumers. It is clear that the existing messages on bills are not reaching the more vulnerable and less engaged consumers. Alternative channels must be explored and developed.http://www.consumerfocus.org.uk/files/2011/06/Missing-the-mark.pdf

## Lloyds Bank publishes UK Business Digital Index

Lloyds Bank has published its UK Business Digital Index, which measures the digital maturity of SMEs and charities in the UK.

The new research is based on the analysis of Lloyds' customer data and a survey of just under two thousand small businesses, charities, clubs and societies. It was created in association with Accenture, as part of its commitment as founder partners of Go ON UK - the UK's Digital Skills Alliance.

The Index benchmarks how effectively SMEs and charities are capitalising on digital technologies, including their use of social media, online sales, digital advertising and level of basic online skills. Also the level of investment in digital infrastructure, training and use of advanced digital security techniques.

It has identified many significant points and highlights some positives around the digital maturity of SMEs and charities in the UK, including:

➢ Almost 1.5m SMEs in the UK have a high degree of digital maturity, meaning they invest significantly in their digital infrastructure.
➢ There is a positive correlation between the most digitally mature SMEs and charities and those who have confidence in their own enterprise in the UK economy as a whole.
➢ Around two thirds of digitally mature businesses rate themselves as above or significantly above their performance expectations.

However, the research also provides some startling results:

➢ Only 50% of small businesses and charities have a website
➢ 29% felt the internet was not relevant for their business and over a third felt they were doing all they could online
➢ Around 30% of small businesses and charities don't have the basic online skills – as defined by Go ON UK and the areas in most need of support are North West, Yorkshire & Humberside and East Midlands
➢ 11% of respondents said they don't use the internet at all

Lloyds Bank, a founder partner of Go ON UK, has committed to repeating this index on an annual basis helping to highlight areas of challenge and success in the UK. It will help provide the benchmark for not only the UK but each region.

Further details can be found here

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