

Ofcom Consumer Panel Research Quantitative Research Findings

Focus on Wales






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April 2005

Report outline

- This report compares the findings for residential consumers in **Wales** with those for residential consumers in the **UK overall**
 - measures for England, Scotland and Northern Ireland are also shown for comparison
- Differences shown of $\pm 6\%$ (where based on all respondents) are statistically significant
- Where findings for Wales are significantly different from the UK average this has been shown using green and red arrows
 - to indicate significantly higher or lower measures for Wales
- Unweighted base sizes are shown throughout the report to illustrate the number of respondents interviewed

Profile of groups of interest by nation

Figures in **bold** indicate where the incidence of a group is significantly higher than for the UK as a whole or in comparison to other nations in the UK. Final row and final column indicate the number of interviews conducted for the Consumer Panel survey.

	England 	Scotland 	Wales 	Northern Ireland 	UK TOTAL 	<i>INTERVIEWS CONDUCTED</i>
Older people (aged 65 plus)	16%	16%	18%	14%	16%	461
Rural	13%	13%	19%	55%	15%	398
Non-white	7%	1%	2%	1%	6%	331
Limiting long term illness/ disability	14%	18%	29%	15%	15%	488
TOTAL NATION SPLIT	84%	8%	5%	3%	100%	
<i>INTERVIEWS CONDUCTED</i>	1398	426	352	343	2519	

Summary of key findings for consumers in Wales compared to UK

Understanding

- Less likely to have heard of broadband, digital radio and 3G
- Awareness and understanding of digital switchover does not differ from the UK as a whole

Keeping informed

- Less likely to keep informed of developments in communications technologies at all

Ownership, use and satisfaction

- Less likely to have mobile phone or internet at home
- More likely to have digital TV
- Less likely to access the internet at all
- Less likely overall to have ever switched suppliers for their home communications services
- Less likely to be dissatisfied with their home communications services
- More likely to have any difficulties using a TV, but no real difference regarding other technologies

Less likely to have heard of broadband, digital radio & 3G

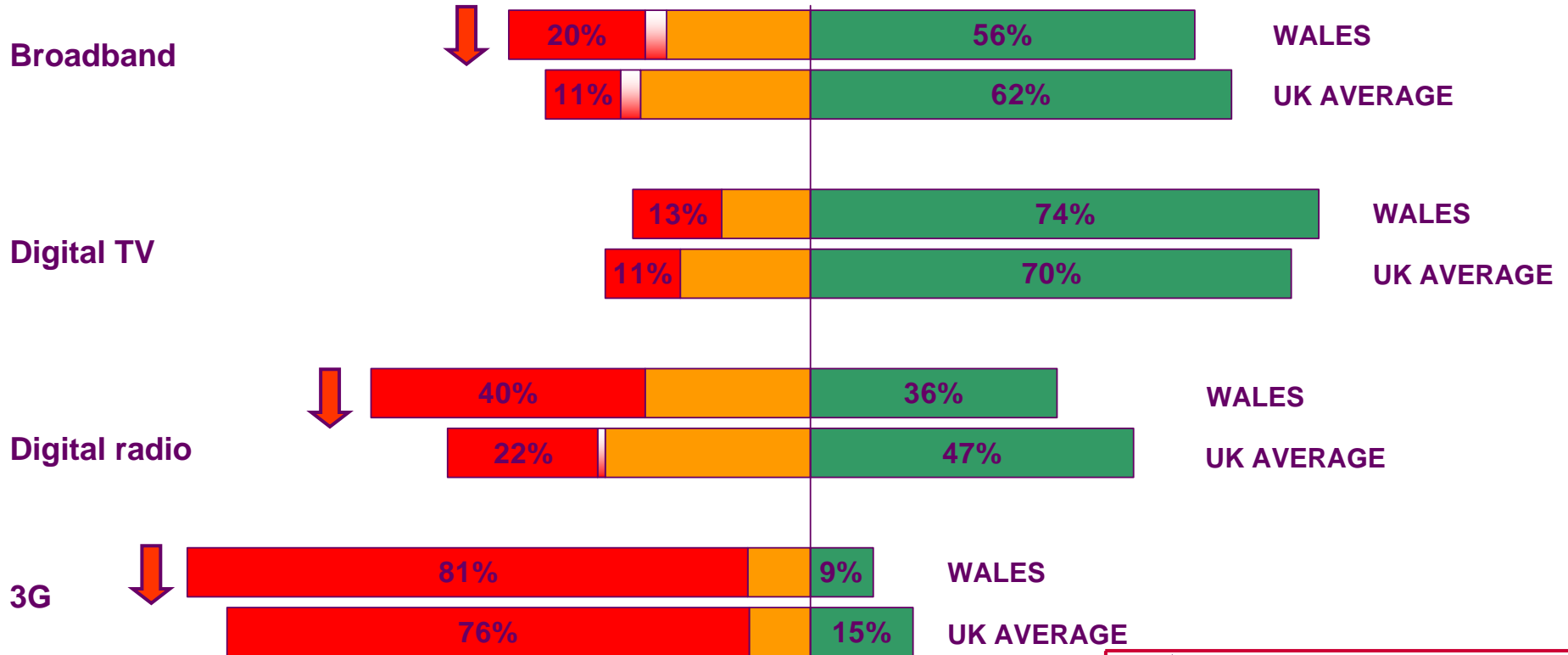
Aware of each communications term

Not aware

Misinformation

Can't describe

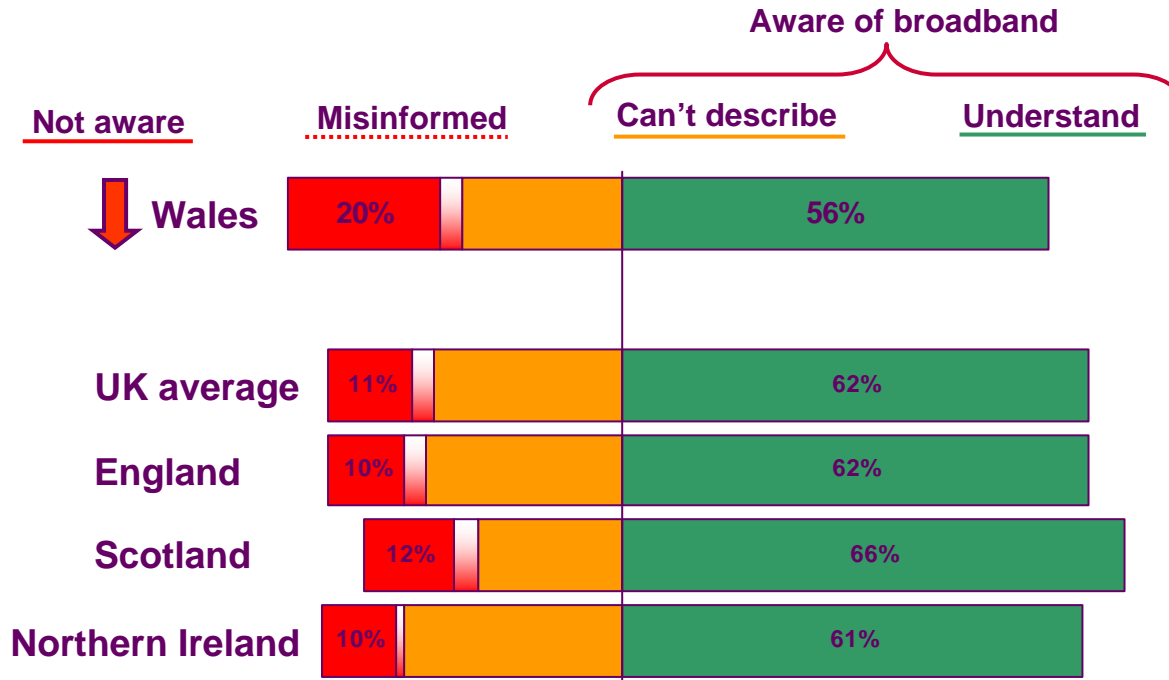
Understand



Base : All respondents in Wales (352) and UK overall (2519)

↓ ↑ Indicates significantly lower levels of awareness or higher levels of understanding

Less likely to have heard of broadband compared to UK average

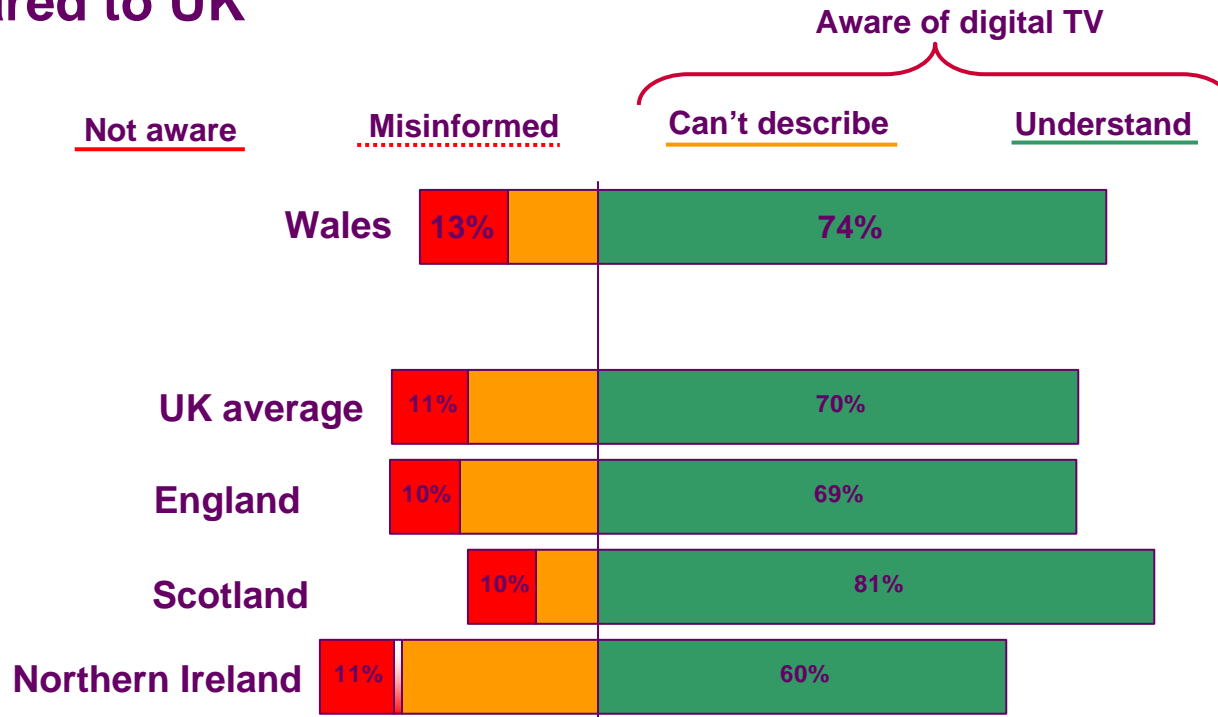


Amongst consumers in Wales, awareness and understanding of broadband is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

No significant difference in awareness or understanding of digital TV compared to UK

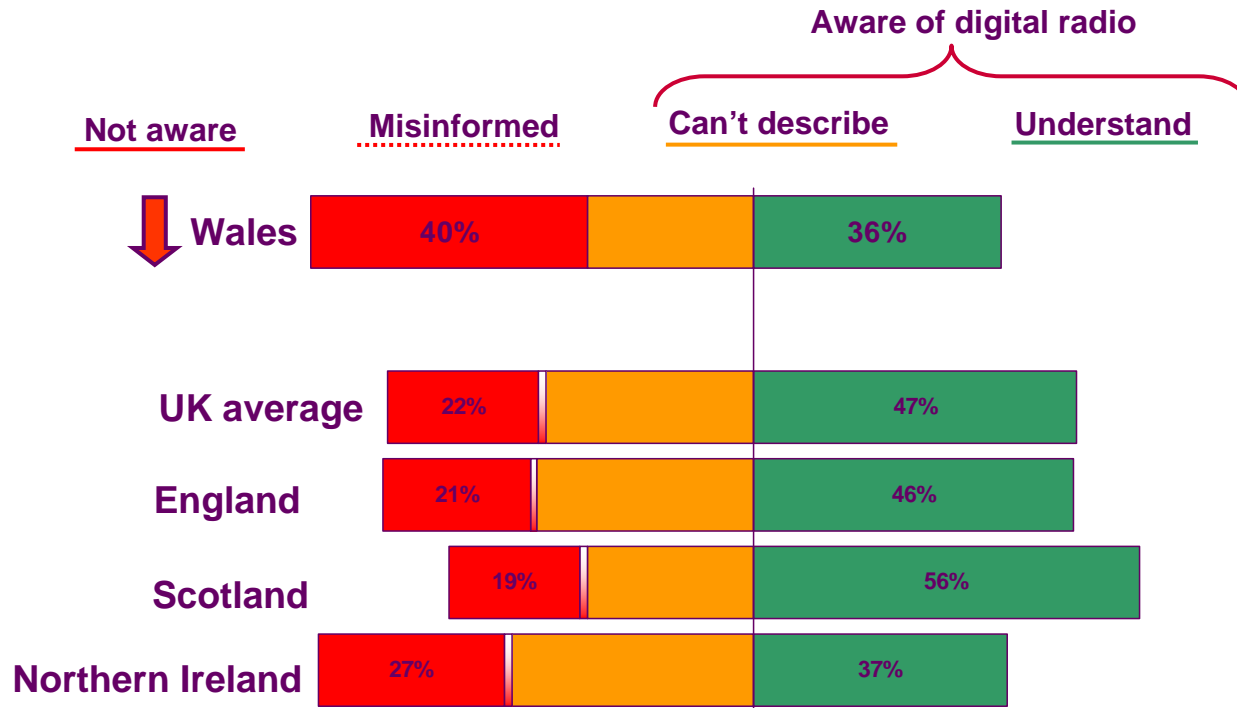


Amongst consumers in Wales, awareness and understanding of digital TV is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

↓ ↑ Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Less likely to have heard of digital radio compared to UK average

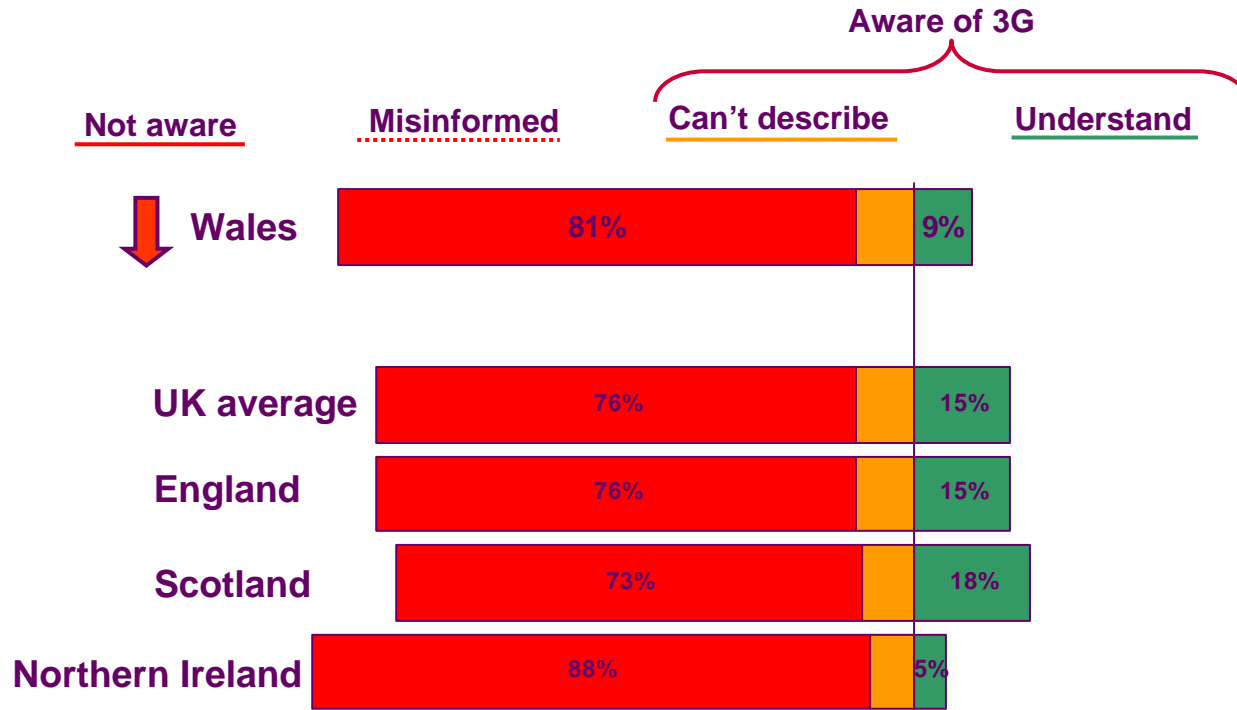


Amongst consumers in Wales, awareness and understanding of digital radio is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year)

Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Less likely to have heard of 3G compared to UK average

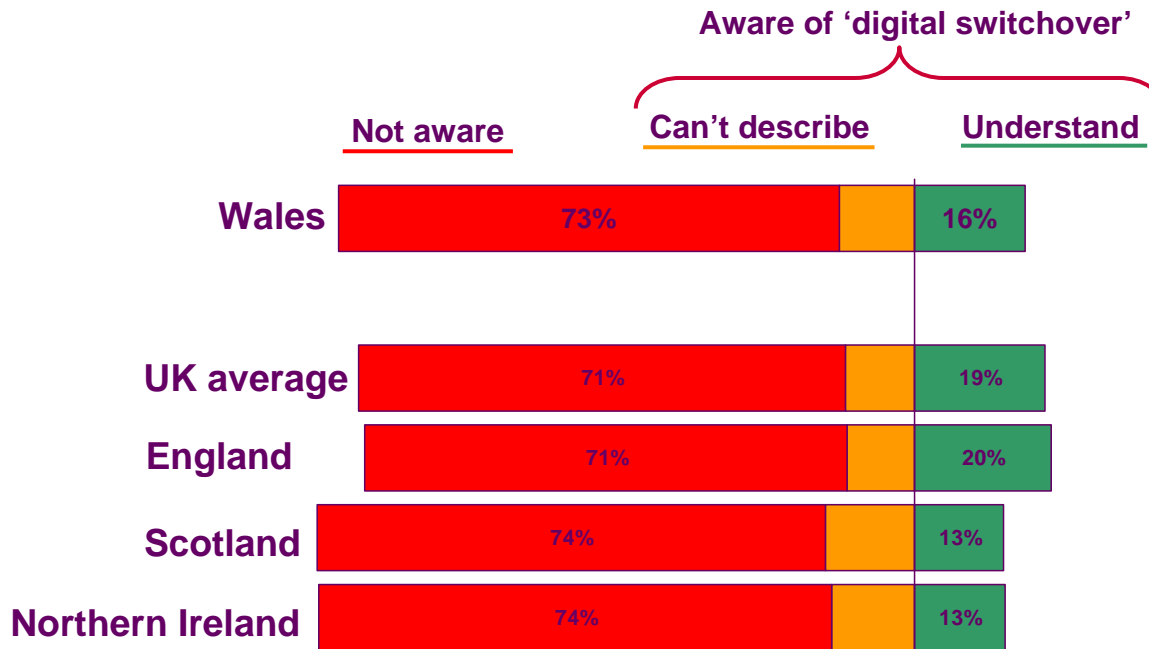


Amongst consumers in Wales, awareness of 3G is significantly lower amongst older people (aged 65 and over) and those in low income households (under £11,500 per year), and understanding of 3G is significantly lower amongst older people

Indicates significantly lower levels of awareness or higher levels of understanding

Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Understanding 'digital switchover' no different to the UK average

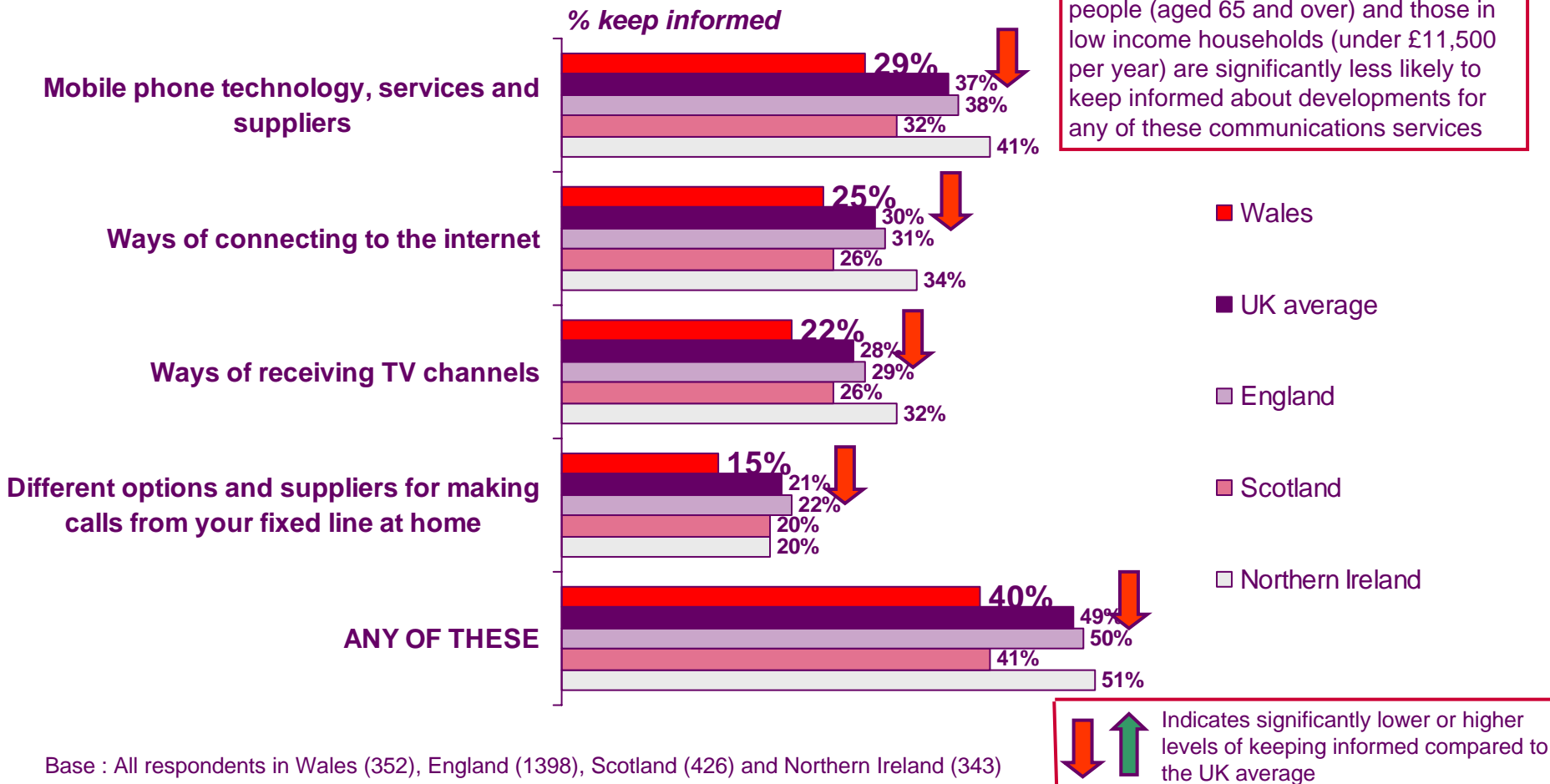


Amongst consumers in Wales, older people (aged 65 and over) do not differ from Wales as a whole in terms of either awareness or understanding of digital switchover. Those in low income households (under £11,500 per year) are less likely to understand and less likely to have heard of digital switchover.



Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

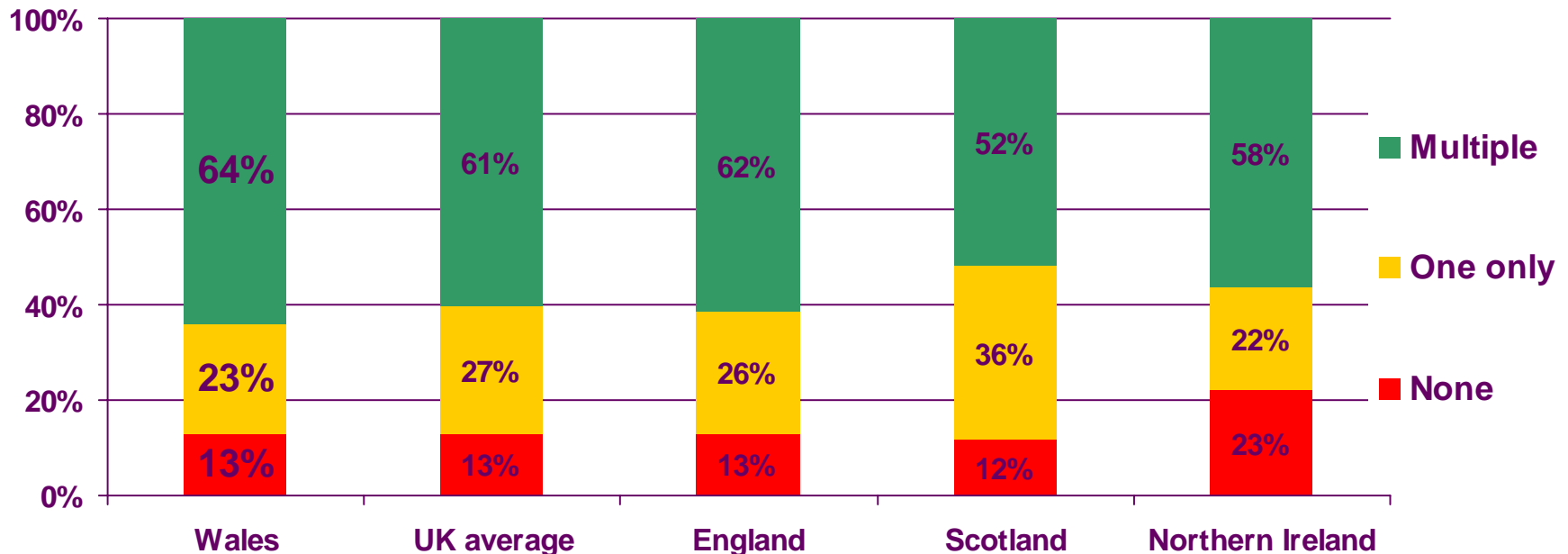
Significantly less likely to keep informed compared to UK average



Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Proportion of consumers in Wales able to recall sources of information does not differ to the UK average

Amongst consumers in Wales, older people (aged 65 and over) and those in low income households (under £11,500 per year) are significantly less likely to recall any sources of advice or information on communications services



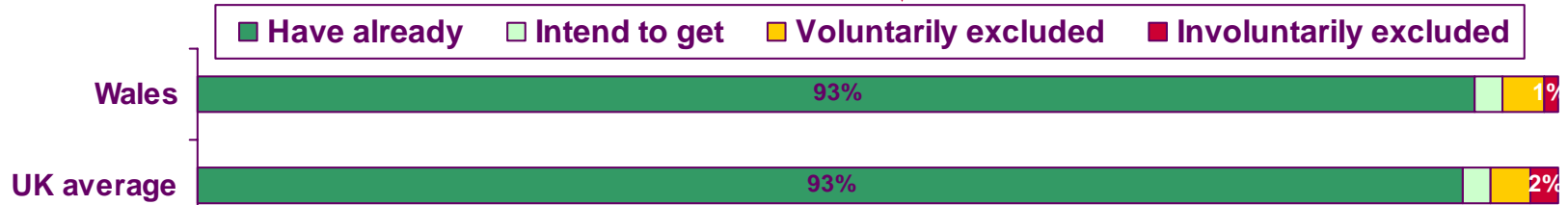
Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Higher levels of digital TV ownership, but lower levels of mobile phone and Internet ownership

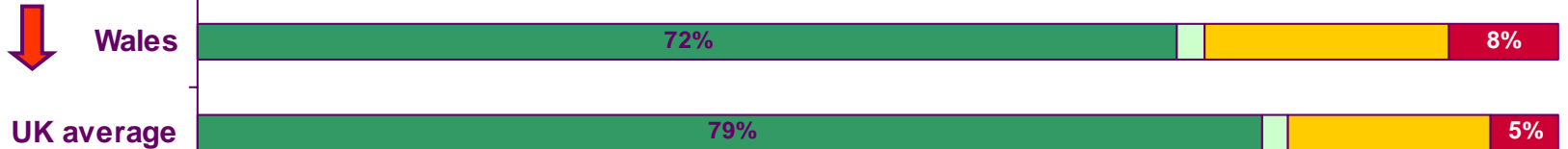
(i.e. No need/ don't want)

(i.e. Have not made a choice)

Landline



Mobile



Internet



Digital TV



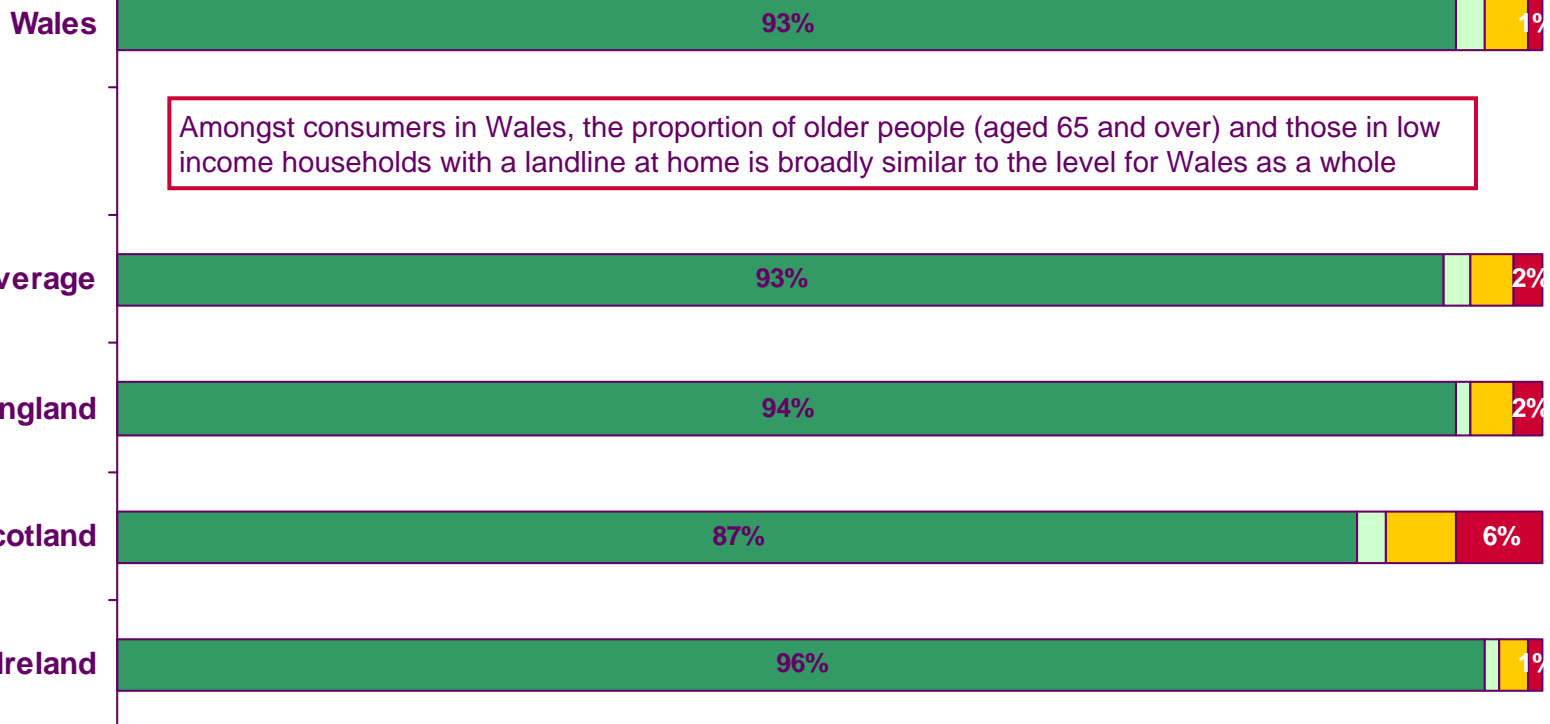
Indicates significantly lower or higher levels of ownership

Base : All respondents in Wales (352) and UK overall (2519)

Ownership levels for landline matches the UK average

(i.e. No need/ don't want) (i.e. Have not made a choice)

■ Have already ■ Intend to get ■ Voluntarily excluded ■ Involuntarily excluded



Amongst consumers in Wales, the proportion of older people (aged 65 and over) and those in low income households with a landline at home is broadly similar to the level for Wales as a whole

Landline

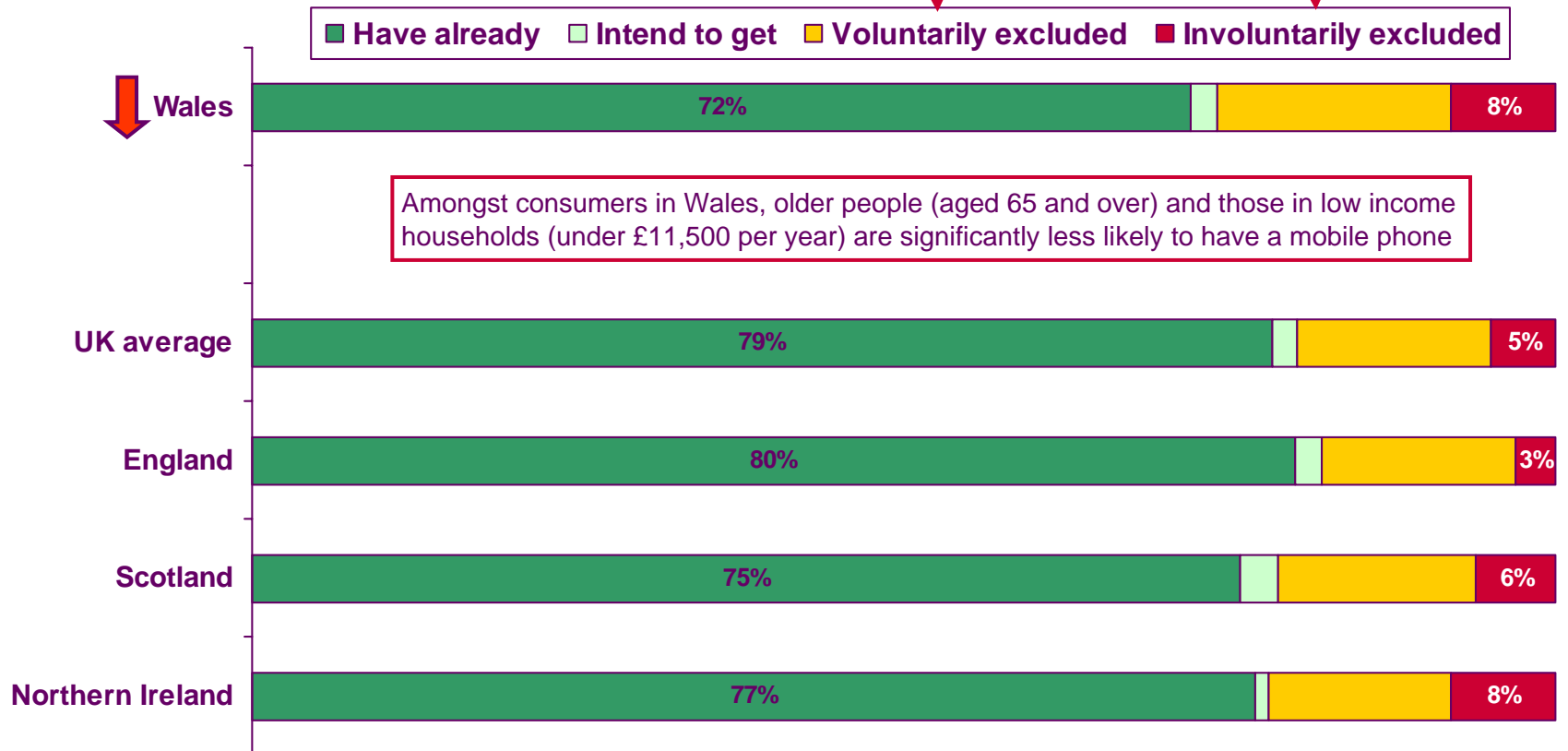
Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Indicates significantly lower or higher levels of ownership

Lower mobile phone ownership levels compared to UK average

(i.e. No need/ don't want)

(i.e. Have not made a choice)

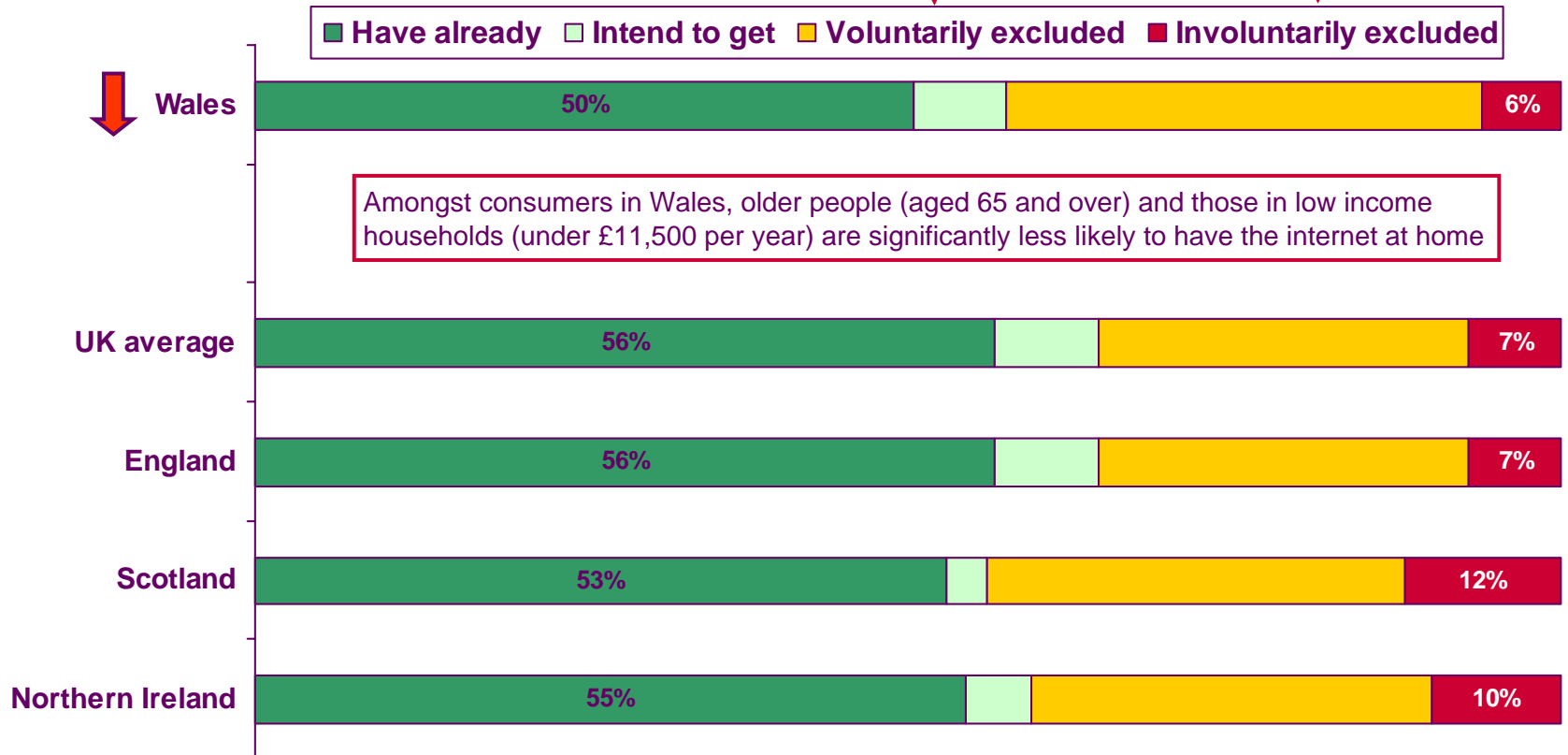


Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Indicates significantly lower or higher levels of ownership

Less likely to have the internet at home compared to UK average...

(i.e. No need/ don't want) (i.e. Have not made a choice)

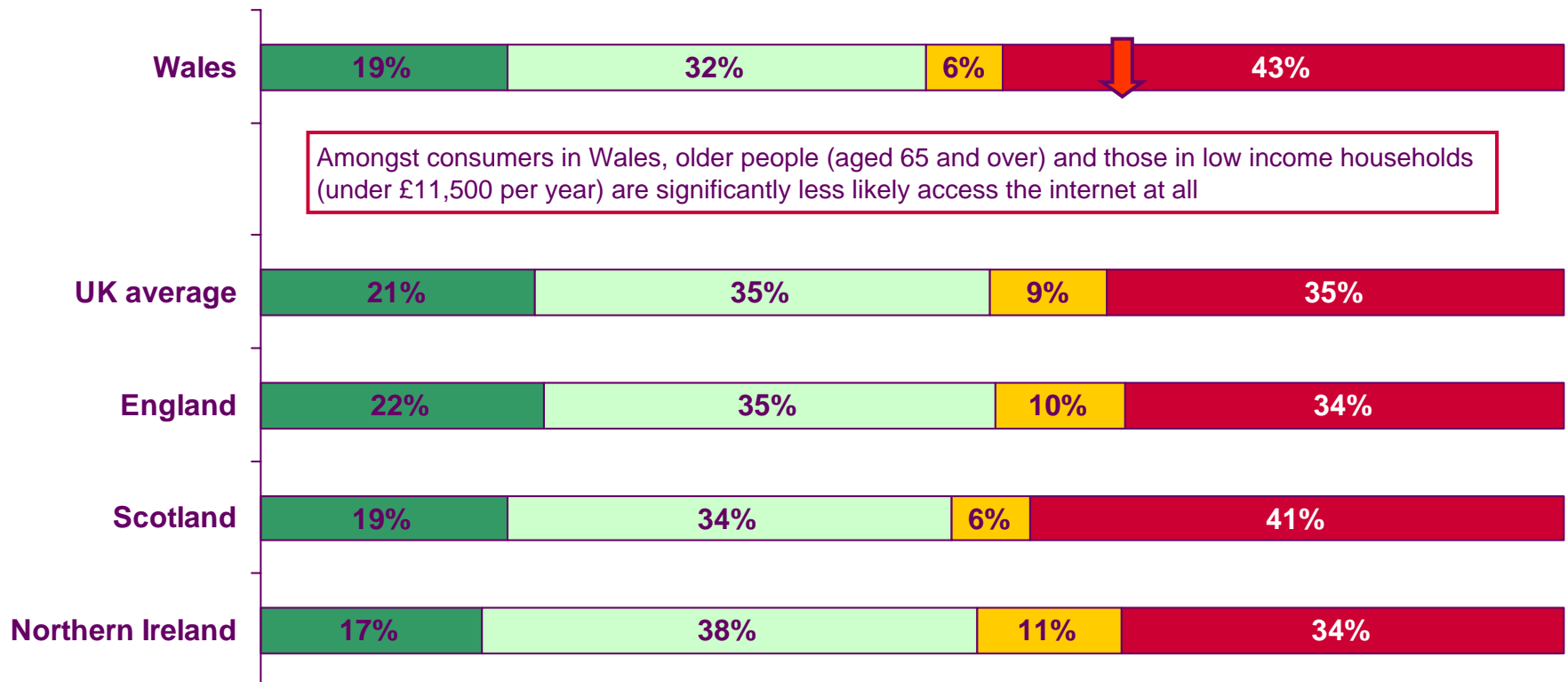


Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

Indicates significantly lower or higher levels of ownership

... and less likely to use the internet at all compared to the UK average

■ Broadband access ■ Dial-up access ■ Access elsewhere but not at home ■ Do not access the internet



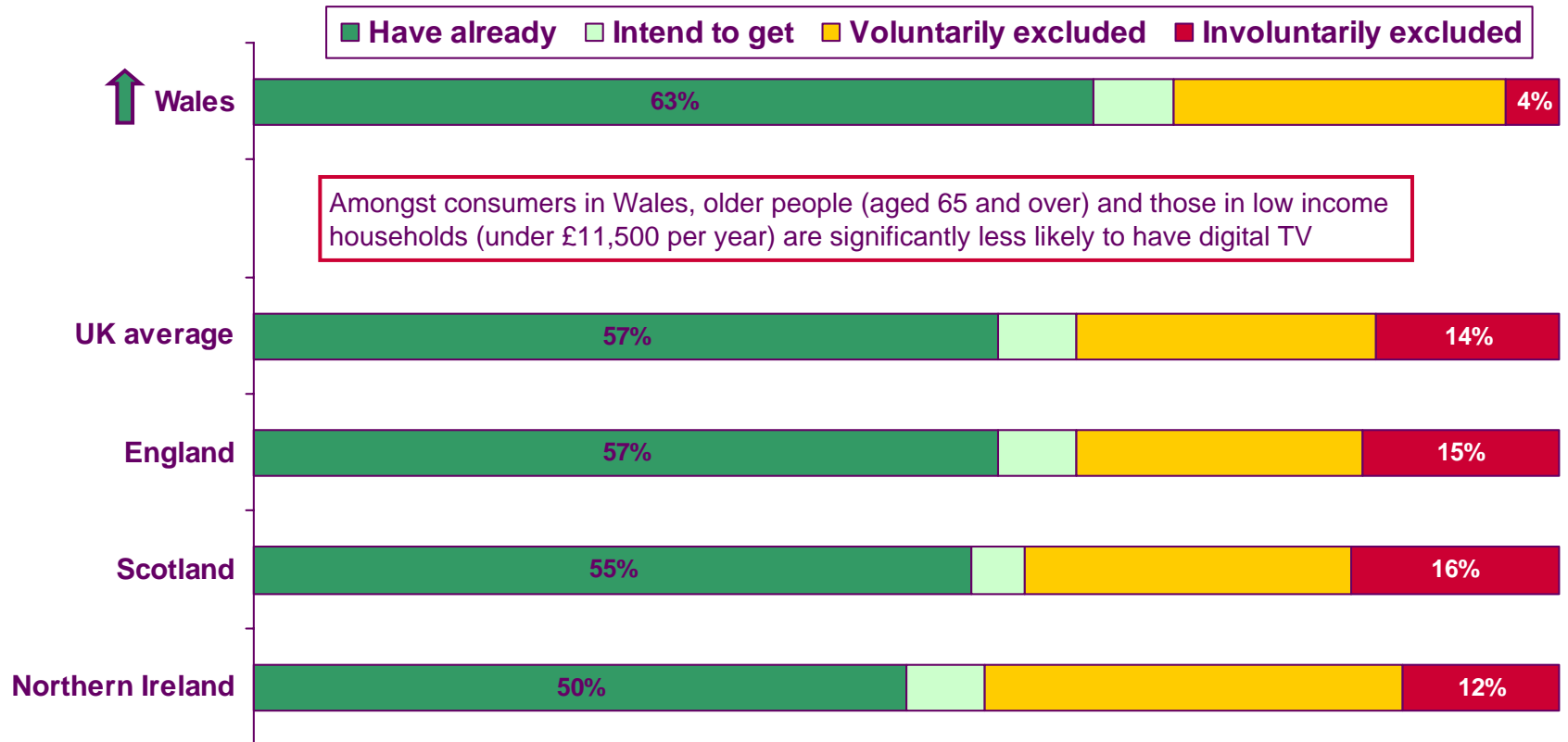
Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

↓↑ Indicates significantly lower or higher levels accessing the Internet

Most likely to have digital TV at home

(i.e. No need/ don't want)

(i.e. Have not made a choice)



Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)

↑↓ Indicates significantly lower or higher levels of ownership

Lower levels of switching mobile phone network and digital TV service supplier compared to UK average

Landline



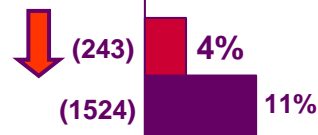
Mobile



Internet



Digital TV



In Wales sample sizes for older people (aged 65 and over) who have each of the technologies at home are too small to make any robust comparisons.

The same is true for those in low income households (under £11,500 per year) regarding internet.

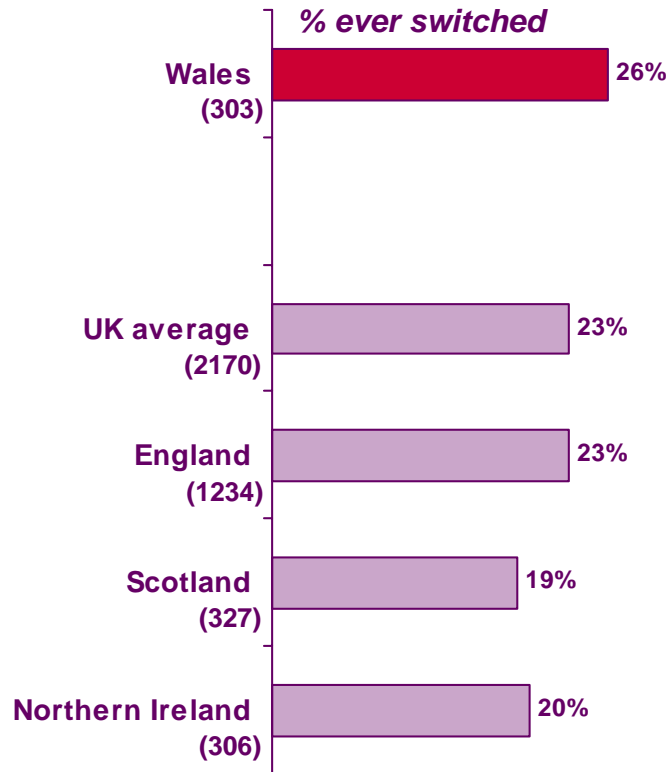
Ownership levels for landlines, mobile phones and digital TV amongst those in low income households in Wales do not differ significantly from Wales as a whole.

■ Wales
■ UK average

Base : All with access to each service at home

Indicates significantly lower or higher levels of switching

No significant difference in landline customers switching supplier compared to the UK average

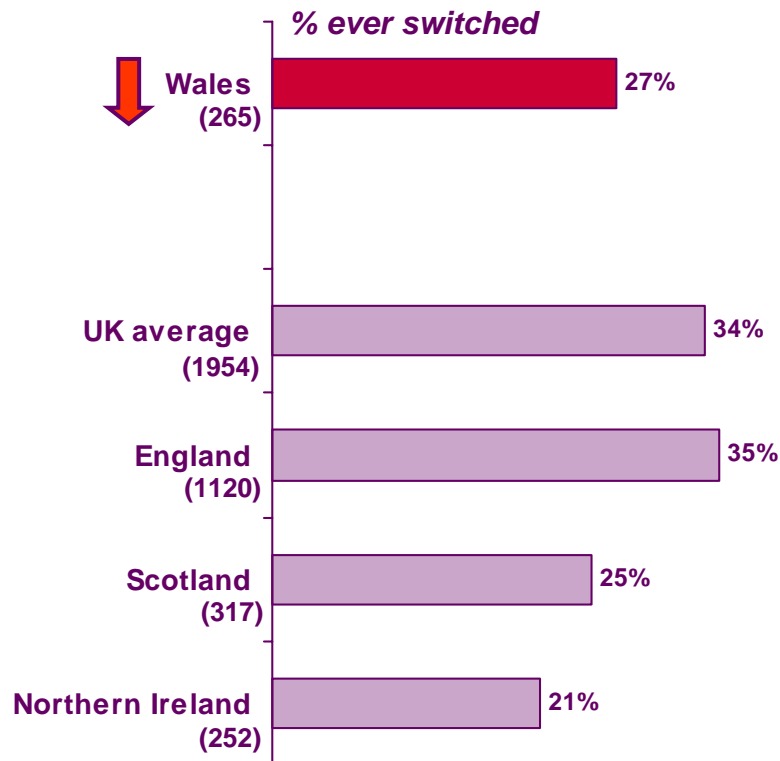


Landline

Base : All with a landline at home

 Indicates significantly lower or higher levels of switching

Less likely to have ever switched mobile phone network compared to the UK average

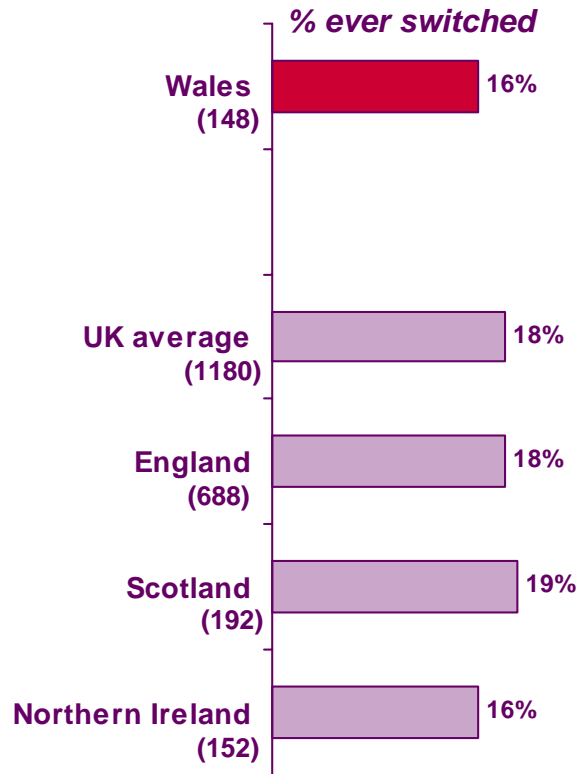


Mobile

Base : All with a mobile phone

 Indicates significantly lower or higher levels of switching

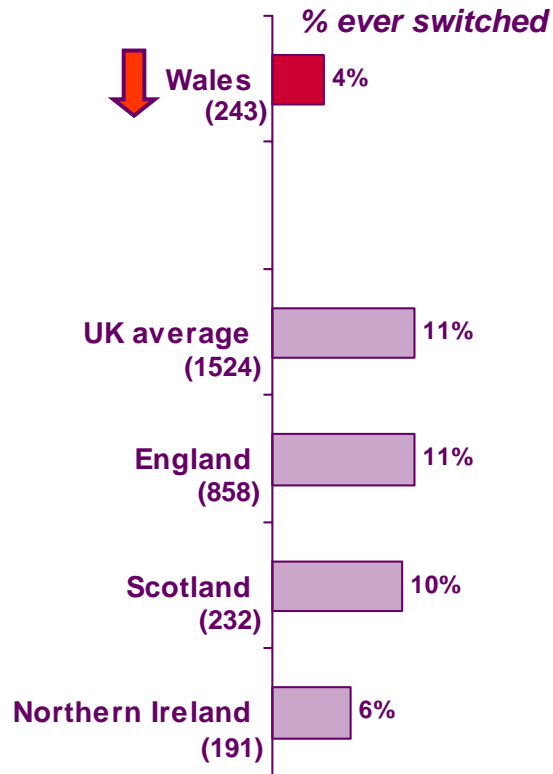
No significant difference in internet customers switching supplier compared to the UK average



Base : All with internet access at home

  Indicates significantly lower or higher levels of switching

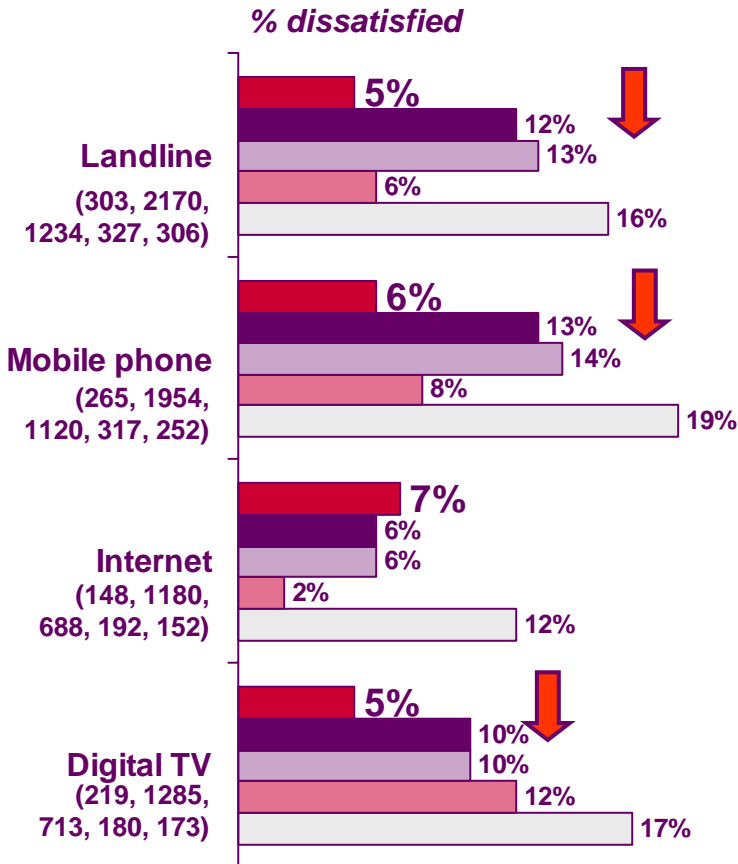
Digital TV customers less likely to have switched supplier compared to the UK average



Base : All with digital TV at home

Indicates significantly lower or higher levels of switching

Lower proportion dissatisfied with their services than the other nations



In Wales sample sizes for older people (aged 65 and over) who have each of the technologies at home are too small to make any robust comparisons. The same is true for those in low income households (under £11,500 per year) regarding internet. Levels of dissatisfaction regarding landlines, mobile phones and digital TV amongst those in low income households in Wales do not differ significantly from Wales as a whole.

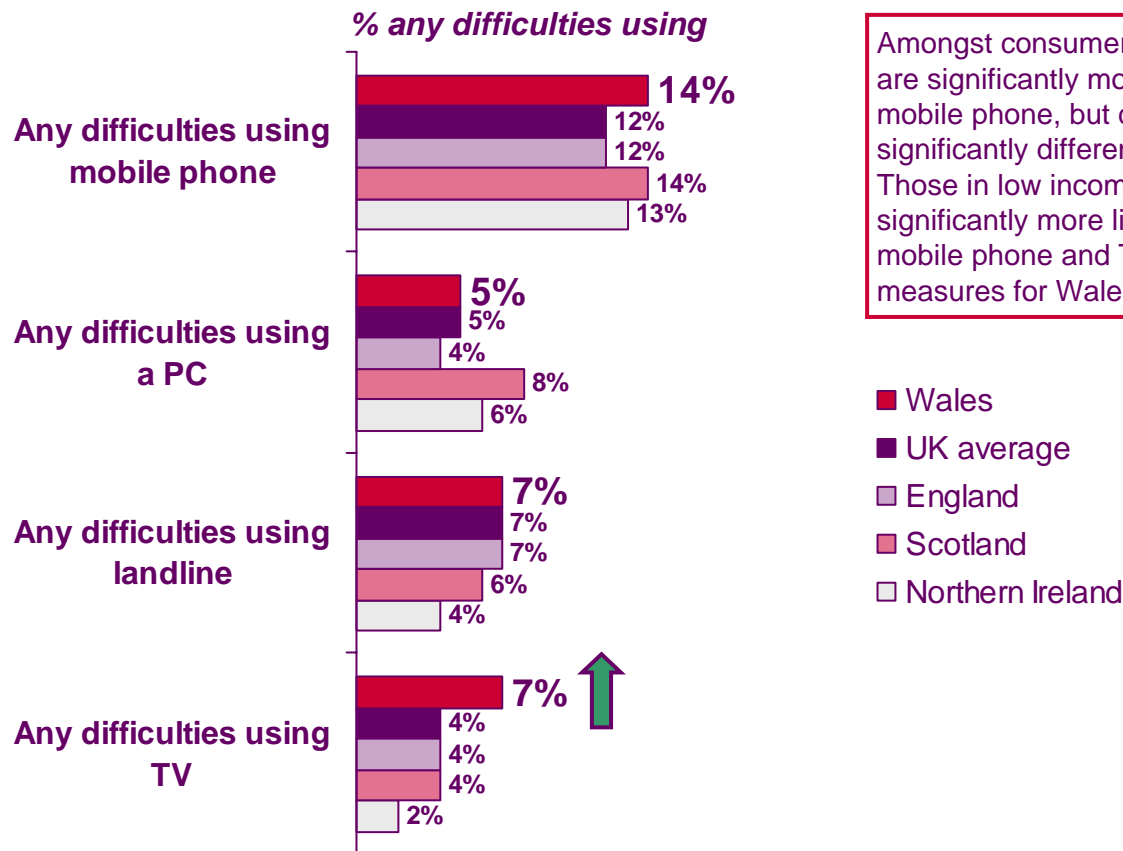
- Wales
- UK average
- England
- Scotland
- Northern Ireland

Base : All with access to each service at home



 Indicates significantly lower or higher levels of dissatisfaction compared to the UK average

More difficulties using a TV than other nations – but similar levels of difficulties using other technologies



Amongst consumers in Wales, older people (aged 65 and over) are significantly more likely to report any difficulties using a mobile phone, but difficulties with other technologies are not significantly different due to the relatively low base size. Those in low income households (under £11,500 per year) are significantly more likely to report any difficulties using a landline, mobile phone and TV, but do not differ significantly from the measures for Wales as a whole for using a PC.



Indicates significantly lower or higher levels reporting any difficulties using compared to the UK average

Base : All respondents in Wales (352), England (1398), Scotland (426) and Northern Ireland (343)