OFTEL

Mobile Leaflet

Qualitative Research Findings

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CONTENTS

1. BACKGROUND AND METHODOLOGY

1.1 Background

In 2001, Oftel produced four leaflets for consumers, aimed at raising awareness of their rights and opportunities as telecoms users. During the course of this research, consumers expressed interest in information regarding choices in the mobile market. In response to this demand, Oftel has prepared a mobile publication which it wanted to test prior to publication.

The mobile leaflet was designed and constructed with reference to the points raised by consumers during previous qualitative research, taking account of lessons learned.

The research focussed primarily on the content of the publication, but also examined the design and its influence on the overall message and success of the publication.

1.2 Research Objectives

The research will be used to shape both the content and design of the leaflet prior to distribution, to ensure that:

- The content met consumers' needs with regard to mobile information

- The design was complimentary to the content and sufficiently attractive to ensure consumers would pick up and use the leaflet

Oftel plans to initially distribute the proposed leaflets to mobile retail outlets, where consumers would be most likely to seek out this type of information. A further specific objective was, therefore;

- To confirm that this was the most appropriate distribution channel

1.3 Method

Six Group discussions and six face-to-face depth interviews were conducted. Group discussions allowed a more realistic reflection of general public views and shared consumer responses. This approach was chosen as it was felt that the group format would give an opportunity to seek views from all respondents within a stimulating discussion forum. Focus groups generally give the most effective feedback regarding design and impact issues, as well as broadly highlighting views on leaflet content.

Face-to-face depth interviews offered an opportunity to examine the research material in greater detail and allowed the inclusion of more personal responses, examining the complex information presented in the leaflets.

1.4 Sample

The following recruitment criteria were used:

- A majority of respondents were existing mobile phone users with a minority currently seeking to purchase a mobile phone.
- A mix of experience in relation to mobile phone ownership. This ranged from those obtaining a mobile phone in the last three months through to those owning a phone for over two years. Those currently seeking to own a mobile phone were planning to do so in the next 2-3 months.
- A mix of age, sex, socio-economic group/income and geographic region was achieved.
- A mix of mobile network (BT Cellnet, Orange, Vodafone, One-to-One).
- A mix of mobile package types – including both prepay and post-pay.
- The sample also included some respondents who were currently thinking of switching mobile providers or mobile package type.
- The sample also included respondents who had used their mobile abroad in the last six months and respondents who were planning to do so in the near future.

Sample breakdown:

Six focus groups:

1. Male, BC1. 20-29 years, London/S.East
2. Male, BC1, 50-60 years, Midlands
3. Male, C2DE, 30-49 years, North
4. Female, C2DE, 50-60 years, Midlands
5. Female, C2DE, 30-49 years, London/S.East
6. Female, BC1, 20-29 years, North

Six depth interviews:

1. Male, C2DE, 30-49 years, London/S.East
2. Female, BC1, 50-60 years, London/S.East
3. Female, C2DE, 30-49 years, North

All respondents were currently seeking to obtain a mobile phone within the next 2-3 months

4. Male, C2DE, 20-29 years, Midlands
5. Male, BC1, 50-60 years, North
6. Female, BC1, 20-29 years, Midlands

All respondents were currently seeking to switch either mobile network or package type.

Research was conducted between April and May 2002 in London/S. East, Birmingham and Nether Poppleton (York)

2. MANAGEMENT SUMMARY

The sample was generally happy to switch utility suppliers (including telecoms) , feeling that consumer choice has increased considerably in the recent past and that significant savings can be achieved by changing supplier. Equally, utility suppliers have made the switching process very simple.

Very few respondents had sought independent advice regarding switching and accepted that much of the information available was biased. There was, however, little real interest in accessing independent information, since few had encountered problems with new suppliers.

Mobile ownership was high within respondent households and the sample tended to feel that it was difficult to function without a mobile in the current social climate. Switching phone and network was common, with respondents believing that fashion and special offers might easily tempt them to switch.

The sample was equally divided between those with contract and PAYG mobiles. The former seemed to be more interested in extended choice of handsets and package benefits, while the latter focussed upon simplicity and control of spending on calls.

Usage of mobiles had increased amongst all sample segments – to the surprise of some. Problems were rare and most complaints from respondents concerned poor customer service and slow resolution of billing problems. PAYG users had few complaints about their providers. All believed that mobiles were cheap and easy to replace – and that it would be simple to escape from an existing arrangement if necessary. Overall, there was a relaxed attitude towards mobile ownership and usage.

Overall, the Oftel mobile leaflet was well received, with respondents feeling that the information was relevant and potentially useful. Although some were disappointed with the level of detail on offer (especially regarding cost comparisons and service quality) there was acceptance that the leaflet generally provided valuable consumer insights.

Design factors aroused most criticism. The leaflet cover was particularly problematic, with virtually all respondents feeling that it would not have sufficient impact in terms of communication. There were some problems with the colour of the leaflets used in this research and it was explained to respondents that the intended front cover colour would be more vibrant and attractive. Even so, respondents had difficulty in interpreting the meaning of the visual elements used on the cover.

The picture of a mobile phone was too obscure and a majority of the sample found this incomprehensible. Equally the circles representing the keys of a phone were typically seen as bubbles and the overall intention to present the leaflet cover as the face of a phone was missed.

There were also strong views concerning the text size used on the front cover. Most respondents believed that `Your mobile choices' should be much larger and would be missed in the current font size. Some could not understand why the Oftel logo was larger than the leaflet title. Equally, some respondents felt that the title did not accurately communicate the contents of the leaflet and rather `undersold' the value of the publication.

In more general design terms, however, the leaflet performed well. The contents page was well received and seen as valuable – while the format/size of the leaflet was liked by most and seen as easy to store. The use of large headings and bullet points was also viewed very positively, while the language and tone used was felt to be straightforward, accessible and suitable for a wide range of mobile users. Importantly, the overall length of the leaflet was seen as appropriate – not too complicated and weighty, but still providing a broad range of information.

Most respondents were aware of Oftel and its role. The Oftel endorsement gave the leaflet greater validity and most respondents saw the information presented as independent and trustworthy.

There were a number of specific comments regarding individual sections of the leaflet:

- Some felt that **`Who should read this leaflet?'** would be better presented as `Why you should read this leaflet'. Respondents felt that interest in the leaflet was self-defining and the potential benefits of the leaflet content needed to be communicated

- The **`important things to think about'** section was seen as a valuable check-list by the more knowledgeable and as `food for thought' by the less knowledgeable. Distinctions between information relevant to either contract or PAYG users need to be made plain.

- **`Comparing prices'** was a key section and some respondents were disappointed by the lack of detailed information regarding price comparisons, although most understood why this was so. It is not clear whether many of the respondents would actually use any of the price comparison mechanisms mentioned in the leaflet, but at least the issue was effectively flagged up amongst the target audience.

- Again, the section dealing with **`standards of service'** was disappointing for some respondents, who expected to see detailed comparison data. Overall, the issue of service was not seen as very important by many in the sample, apart from those making use of mobiles for business purposes.

- **`Ways to pay'** confused a number of respondents, who were unfamiliar with the `pay up front' concept – and most were not greatly assisted by the explanation offered in the leaflet. Greater clarity is required when explaining this option.

- **Controlling the costs of mobile use** was seen as a core area of concern and some respondents felt disappointed that the leaflet did not include many new ideas for achieving control. Most, however, recognised that control was largely a matter of common sense and that the leaflet did provide a valuable check-list of issues relating to cost factors.

- The section dealing with the true **costs of calling other networks** surprised many respondents, but most took an indulgent approach to using their mobile and it seems unlikely that many would change current behaviour based upon the material presented in the leaflet.

- Information about what is **included with monthly line rental** was well-known amongst the more experienced users, but this was, again, seen as a useful checklist. **Using mobiles aboard** was a difficult subject – many respondents simply rejected the idea outright and some were confused by the information about SIM cards and their possible role in international calling.

- **Insurance for mobiles** was largely dismissed by most respondents, who felt that mobile policies were not value for money and that mobiles could be replaced relatively inexpensively. Equally, information concerning the cost of **others calling your mobile** was of no interest, with respondents seeing this as a decision for the caller alone.

- The section relating to **`What else should I know about mobile charges?'** definitely contained new and surprising information. Information regarding the true costs of calling free-phone and premium-rate numbers was amazing for many.

- Information regarding **changing tariffs, service provider and handset options** was fairly familiar to many and there was a sense that switching was not problematic. Moving service provider was often seen as an exciting opportunity to upgrade handset and therefore few were interested in keeping a current handset. The material relating to SIM-only and SIM-free options was too technical for most. Equally, a majority of the sample knew that phone numbers were transferable between service providers. Options relating to upgrading handsets were news for many and, in particular, the storage of SIM data by providers was clearly interesting.

- In terms of **`other mobile issues'**: the mobile internet was not of interest to many, options for disabled and older users were relevant to some and the section relating to mobile phone theft was felt to need extra information regarding tips for avoidance of theft.

- The **safety of mobiles and mobile masts** was a concern for most and respondents appreciated the option to explore these issues further.

As ever, contact details were positively viewed, since they imply some evidence of accountability on the part of the leaflet provider.

Overall, while many respondents found information that was new in the leaflet, there was a feeling that the leaflet would mainly be of use to first-time buyers or less knowledgeable users. Those in the sample who were actively seeking to switch provider or package type clearly felt that they already knew most of the content. The sample, however, did believe that all mobile users would find the leaflet valuable as a checklist or reference aid.

In relation to availability, respondents indicated that the leaflet should be available at a number of key outlets: Mobile phone retailers; Post Offices; Libraries, Supermarket community boards and Citizen’s Advice Bureaux.

3. MAIN FINDINGS

3.1 Respondent Background

3.1.1 General consumer behaviour

In general a majority of respondents had experience of switching suppliers across a range of utilities. Most easily switched were gas and electricity providers. For most, switching suppliers was a response to persistent marketing activity by rival suppliers. This marketing activity was typically undertaken either face-to-face (door steps or approaches in the street) or by telephone.

The most successful marketing approaches emphasised that money could be saved by switching supplier. For most respondents this financial inducement was a key factor in prompting switching behaviour generally:

"They phoned and said I could save x number of pounds. So there you go." (Female, 30-49 years, C2DE)

In terms of telecoms, a majority of respondents knew of at least two providers on their area. Switching was again a response to apparent financial benefits, but was also affected by the inclusion of TV and phone packages offered by cable and satellite companies.

Respondents generally took a relaxed approach to switching utilities with many freely changing backwards and forwards between a number of suppliers. Respondents believed that the consumer has become more powerful in recent years and this clearly influenced their switching behaviour:

"Well if someone offers you a better deal you might as well give it a go. Show the other company that they can't take you for a mug!" (Male, 30-49 years, C2DE)

Word of mouth was another key factor in triggering switching behaviour. The views of friends, family and neighbours were important. Interestingly, some respondents had actually acted upon snippets of conversation overheard at work – the people talking were unknown to the respondents – which emphasises the real power of word of mouth.

In terms of the major utilities, very few respondents had actively sought detailed information about the provider and had focused upon financial factors. However, there was a general feeling that information was 'out there' in the public domain if it was required - some believed that they had seen leaflets in the Post Office . Others recalled reading leaflets which were delivered at home. Generally, however, it was recognised that the information on offer was inevitably provided by potential suppliers rather than representing an independent view:

"Well you know they are trying to sell you something but what else is there?" (Male, 20-29 years, BC1)

Independent advice was rarely sought - with most respondents having little understanding as to where to obtain this type of information. Interestingly, respondents felt that they were unlikely to seek out independent advice unless a major problem occurred with current suppliers:

"Until something goes wrong, and they are unhelpful, you just stay with them…unless someone comes in cheaper!!" (Male, 30-49 years BC1)

"You only learn by experience." (Female, 20-29 years, BC1)

Time was also a factor for many respondents. Most felt that they did not have the time to sort through many leaflets from different suppliers:

"It is a chore really. You need a lot of time to weigh up if there are savings to be made." (Female, 30-49 years, C2DE)

In terms of suppliers, a majority had not encountered any major problems, although some were keen to point out that cable telephone prices appeared to rise very quickly after an initial ‘honeymoon period’. This had caused some respondents to contact customer services in order to seek clarification. Price rises had eventually caused some to transfer back to their original supplier. Most, however, were happier since switching provider, with many believing that they were saving money:

“I wanted to get rid of the TV package but stay with the cable company for my telephone. But when I looked at the prices I was better going back to BT.” (Male, 50-60 years, BC1)

3.1.2 Mobile history

All respondents currently owned a mobile phone, with a smaller number having two active phones (generally one for work and another for personal use). Many also had a collection of ‘dead’ mobiles in drawers and cupboards:

“I think I’ve got about 4 or 5 from the past few years.” (Male, 30-49 years, C2DE)

Respondents had owned their mobiles for a period of time ranging from one to thirteen years. Mobile ownership was widespread throughout households – and families with teenagers, in particular, typically had a mobile phone for each family member:

“There are five of us. Me my husband and the three kids and we’ve all got one. In fact I was the last to get one.” (Female, 30-49 years, BC1)

Reasons for purchasing mobiles varied across the sample. Reasons given included:

- **safety –** this was particularly important for women and respondents who travelled regularly.

- **work –** a phone was either provided by employers or those who were self employed had purchased phones in order to remain contactable.
- **gifts –** a number of respondents, notably middle-aged males, had received mobiles as presents from wives or children. A number of these respondents had initially baulked at having a mobile and still felt that they used it rarely.
- **An alternative to a landline –** this was typical amongst respondents who had recently been students. Parents had supplied a mobile for emergency use and to make use of free off-peak calls.
- **Peer pressure/`everyone else had one' –** from both partners and children. There seemed to be considerable social pressure to be available and in touch - even when respondents had initially tried to avoid getting a mobile.

Mobiles were purchased from a number of sources. Most respondents had bought from specialist mobile phone retailers. A smaller number had bought phones from high street electrical stores and a few had purchased from supermarkets. One respondent had bought their mobile package on the internet:

"I just thought I'd see if I could get something cheaper, so I looked on the internet on the off-chance." (Female, 20-29 years, BC1)

The type of mobile option chosen by the sample was equally divided between contract and pay-as-you-go. Those respondents with contract packages had chosen this option for a number of reasons. For many, contract packages offered convenience, being able to use the phone without topping up for service. This was of particular importance amongst those using their mobile for work purposes:

"I really can't be having to stop on the motorway or something to make sure I've got enough credit. It just is not feasible." (Male, 30-49 years, C2DE)

Contract packages also offered respondents a greater number of options in terms of structure. Although many had not examined the options in detail when selecting a package structure, most had at least considered simple issues such as free air-time and text messaging.

Some respondents noted a greater number of handset options associated with choosing contract mobiles. For those with an interest in technology, this was extremely important when choosing their package – and even those who were less interested in technology were still interested in mobile fashion. Although many would not admit that this was a major issue there was, nonetheless, obviously a great deal of knowledge regarding handsets amongst the sample.

The was a section of the sample, including many women in particular, who were not sure about what is included in their contract package. Although some knew that they had free minutes included, others simply knew they were on, *"…a standard package. Whatever that is…"*

Pay-as-you-go phones had evidently allowed many respondents access to the mobile market without the fear of receiving another monthly bill:

"I get loads of bills every months as it is. I don't want another one." (Female, 20-29 years, BC1)

For some this type of package also allowed greater control over mobile usage:

"I know exactly what I'm spending on my calls. Stick £10 in and I know I've got £10 in!" (Female, 30-49 years, C2DE)

Simplicity was also important for some respondents. Pay-as-you-go packages allowed respondents the option to purchase a mobile without involving themselves in complex issues such as selecting the right tariff, considering how and when the phone would be used and whether free texts or minutes were included:

"I know I'd be really confused by it all, when I use it most and all that. I don't know!" (Female, 30-49 years, BC1)

`Phone-in-a-box' options were also considered ideal for older, less technically-minded users. Many had bought their parents a PAYG phone, for safety reasons, and this option meant that many complexities were avoided.

Switching between package types was quite common across the sample, particularly as they had become more knowledgeable about mobiles and their own pattern of usage. Many had switched tariffs on more than one occasion:

"I had to switch from a contract to pay-as-you-go because I was getting enormous bills." (Female, 20-29 years, BC1)

"I went from pay-as-you-talk to a contract because I wanted the free minutes in the evening and weekends when I use it most." (Male, 20-29 years, BC1)

As well as switching between package types, a majority had also switched suppliers – some on a number of occasions. The sample included a mix of suppliers across the four major networks (Orange, Vodafone, BT Cellnet and 1-2-1/T-Mobile). Switching had occurred for a number of reasons, including:

- New/special offers – similar to switching between utility providers, many respondents were attracted by possible financial benefits. Additionally, many of these special offers also included additional/free minutes, free text messaging etc.
- Coverage – a number of respondents had switched suppliers after experiencing loss of coverage in their local area. Generally, most felt that Orange, Vodafone and BT Cellnet provided similar coverage with 1-2-1/T mobile being perceived as the worst provider (although this was affected by location).
- Word of mouth – again respondents reacted to social inputs. Reports from friends and relatives about both positive and negative service/signal/cost issues were an important influence.
- Social groups - A small number had switched supplier because of their social group. Although most respondents were aware that calling between networks was more expensive this was not a major trigger for switching. Some had switched within families to take advantage of cheaper calls, but this was not typical.
- Just `feeling like a change' – some simply wanted to try other handsets and networks

Very few respondents had experienced major problems with their mobile suppliers. Those that reported difficulties were most concerned with customer service. Problems typically related to difficulties getting through to customer services, unhelpful staff and unfulfilled promises.

Other respondents had also encountered billing problems - being charged twice for calls, being charged for receiving voicemail and text messages that were not made. Some had switched providers as a consequence. There was an underlying sense, from contract phone users in particular, that mobile providers added additional calls to their bills:

"I feel like they look at my mobile use and see that I'm quite a heavy user so they stick some extra calls on thinking I won't notice." (Female, 20-29 years, BC1)

One respondent had noticed that previous payments were not being noted on her bill. When she phoned the company to query the situation, they told her not to worry and ignore the bill, as the amount had, in fact, been debited:

"If I'd have blindly sent a cheque off, would they have told me? I doubt it." (Female, 20-29 years, C2DE)

Pay-as-you-go users generally had little need to interact with their provider. A majority had not needed customer services and their only contact had been with credit lines in order to top up calling credit.

Switching suppliers or tariffs seemed to be straightforward. Generally, switching suppliers was seen as `starting again' - that is, undertaking the same process as buying a new mobile phone:

"It's not a problem. Just don't renew your contract and look for a new one." (Male, 30-49 years, C2DE)

Mobile use, particularly amongst younger respondents, was very different from initial expectations – most had assumed that they would be only using it for safety purposes and in emergencies. However, many were making many more calls than was initially intended. For some this had been a significant factor in switching package type:

"I was making a lot more than I thought I would so I went for a contract instead. All my calls in the evening and weekends were free." (Female, 30-49 years, BC1)

A number of older respondents had also found themselves increasingly using their mobile. Where they had originally intended it to be a contact number for 'emergency' situations, many were now using it for routine purposes. These respondents, however, did not feel that these changes would influence decisions regarding supplier or package type:

"I just want something easy to use so there is no point changing." (Male, 50-60 years, BC1)

Reflecting the relatively incidence and awareness of mobile problems, most respondents had not sought much product or service information when making their initial purchase. Those that had sought information generally picked up leaflets or talked with staff in mobile phone or high street electrical shops. These respondents felt that they had received good advice and information regarding particular phones and tariffs, although most clearly recognised that staff were salesmen:

"I listen to what they tell me even though I know they are probably on a commission from a specific company." (Female, 30-49 years, C2DE)

Some younger respondents felt that they knew enough about mobiles to be able to confidently make their own decisions. Within this group were a small number of "techies" who, through wide experience and a general interest in technology, felt that they probably knew more than most shop staff. Consequently, these respondents felt little need for additional information:

"I wouldn't look for any information. I wouldn't need it. I'm quite interested in mobiles so I read a bit about them in magazines. I don't think a spotty kid in X shop will be able to tell me anything new!" (Male, 20-29 years, BC1)

Interestingly, a majority of respondents were aware that they had not encountered any independent information or advice about the mobile phone market. Additionally, most did not know who to contact or where to go in order to access this type of information. A few respondents spontaneously mentioned Which? As a potentially reliable source of information. Although many respondents were initially unsure about the value of independent information, after reading the leaflet many felt it was important:

"Until this [Oftel] leaflet I didn't think that any independent advice existed." (Male, 30-49 years, C2DE)

3.2 The Mobile Leaflet

3.2.1 Design and layout

The most immediate impact was created by the colour of the leaflet. It was described as dull, boring and as *"…a horrible pukey colour…"*. The colour encouraged the respondents to assume that the leaflet would be official in tone and contain `official' information. This perception generated both positive and negative responses.

More positively, this apparently official approach meant that the content was likely to be trustworthy. Conversely, for some, 'officialness' indicated that the leaflet was likely to be dull:

"It reminded me of a bus timetable." (Female, 30-49 years, C2DE)

"It just looks dull and official. You really don't want to read it." (Female, 20-29 years, BC1)

When respondents were informed that the colour had been printed incorrectly there was a more positive reaction to the updated colour, which was seen as brighter and more inviting. Some were negative green in general, preferring more eye-catching yellows and reds. The subject of new technology was felt to demand a more positive visual presence. As this is was a leaflet about at mobile phones, some respondents suggested it should be silver:

"That [silver] seems to be the colour of mobiles, doesn't it?" (Male, 50-60 years, C2DE)

In addition to problems with colour, respondents also felt that little else in the cover design suggested the topic of mobile phones. The title was felt to be unclear in both its link to mobile phones and as an indication of what type of information the leaflet was likely to offer:

"Mobile could relate to many things. Mobile homes, mobility!" (Male, 50-60 years, C2dE)

"Your mobile choices doesn't really say anything. After reading it, it should say something like, 'Have a mobile phone? Here are your choices' or 'Buying a mobile phone? Here's what you need to know!'." (Male, 3049 years, BC1)

"Say, 'Can we help you with your mobile choices' or ' Did you know…" (Female, 30-49 years, C2DE)

The cover image was unclear and failed to clarify the leaflet's subject matter. The cover photograph clearly confused most respondents - with many unable to identify the image and others believing it to be a washing machine or a TV.

Equally, some respondents were also unclear as to what the 'bubbles' were on the cover:

"I've only just realised now that it is supposed to be the buttons on a phone." (Female, 50-60 years, BC1)

"Until you mentioned it I had no idea." (Male, 30-49 years, C2DE)

Generally, respondents wanted a leaflet about mobile phones to clearly indicate, in visual terms, that it was about mobile phones:

"Just have a picture of a mobile on the front." (Female, 20-29 years, BC1)

"I guess they might have a problem if they only show one company's phone but you could show a range. You don't have to put the makers name on it." (Female, 20-29 years, BC1)

"Have a clear statement about the leaflet and what it is going to tell you about mobile phones." (Male, 30-49 years, C2DE)

This lack of impact, and confusion regarding the leaflet's content, meant that many respondents felt that they were unlikely to pick the leaflet up in its current form. After reading the content, many respondents considered this *"…a shame…"* as the material proved of interest to most:

"You wouldn't pick it up, but when you've read it the stuff inside contradicts what you first think it will be about." (Female, 30-49 years, C2DE)

In terms of content, the leaflet fared much better. Despite consistently negative views about the images used throughout the leaflet – simpler, less obscure images were felt to be needed – responses to the layout were generally positive:

"Don't use those pictures. Alright it needs something [to break up the text] but maybe proper mobiles or stuff related to it." (Female, 50-60 years, BC1)

The use of bullet points was appreciated by respondents, since large blocks of text were disliked. The headings used were clear and bold, although a change in colour would be appreciated:

"They're that horrible green colour aren't they!?" (Male, 50-60 years, C2DE)

The physical format of the leaflet was also generally wee received. The shape was considered ideal to slip into pockets and bags. For a few, however, it still appeared too bulky and irrelevant:

"To tell you the truth because it looks boring and because of its size I've really tried to avoid reading it until today." (Female, 20-29 years, BC1)

"I kept looking at it and putting it down again." (Male, 20-29 years, BC1)

Most, however, had no complaints about the length of the leaflet and this reactions was confirmed after reading:

"No it looked fine and I read through it in about fifteen minutes, no problem." (Male 30-49 years, C2DE)

"I felt that if I picked something up that was that thick I'd be more inclined to think it had something worthwhile to say." (Male, 30-49 years, BC1)

Generally, respondents felt that the leaflet format and layout were appropriate - making the content easy to follow. However, the current colour scheme and cover design left respondents confused about both the overall subject matter and what content to expect.

3.2.2 Expectations of the leaflet

The cover design strongly influenced respondents expectations of the leaflet content. Because of negative reactions to the cover images and title, respondents typically expressed negative expectations regarding the potential contents of the leaflet. Generally, respondents felt that the content would comprise technical information about mobile phones and mobile services:

"I though it would be quite jargony." (Male, 30-49 years, C2DE)

"It made me think it would be about statistics and numbers." (Female, 30-49 years, C2DE)

Equally, reflecting an obvious interest in financial aspects, many felt that the leaflet would offer price, service and tariff comparisons across the various mobile networks. However, in hindsight, it was recognised that this would not be practical:

"…well stuff like that is always changing so it would be out of date pretty quickly…" (Male, 50-60 years, BC1)

Some respondents believed that the leaflet would offer advice regarding who to approach with complaints against telecoms companies.

Overall, respondents felt that the cover did not clearly reflect what the leaflet was really about. For many this was disappointing, considering the quality of information actually on offer - which many found interesting and useful.

3.2.3 Contents page

A majority of respondents did read the contents page, although most felt that this page should be entirely dedicated to the leaflet contents without the additional button image:

"You could break it down further to show all the sub-headings that are in there. Then you could go direct to the page you want." (Female, 30-49 years, BC1)

"That image is just horrible again. It catches your eye and stops you looking at the contents." (Male, 30-49 years, C2DE)

A small number of respondents failed to see the contents page. This was, however, a reflection of their style of reading rather than of the impact of this page:

"I never read the contents. I'd just flick through to see the headings." (Female, 30-49 years, C2DE)

Of the contents listed, most attracted interest from at least some respondents. Those that appeared to be of most interest included 'How can I control the cost of my mobile service' and 'how to choose a mobile service'. Again the link to financial benefits in the former was of clear interest. Respondents also noted that sections about security and safety would also be important, although these were not listed in the contents:

"That should be listed. It is currently in the news so it would attract my attention." (Female, 30-49 years, C2DE)

3.2.4 What is Oftel?

A majority of respondents had noticed and recognised the Oftel name and logo on the front cover. Most had heard of Oftel. Many recalled Oftel's name appearing in newspapers and on TV. However, a number were unsure regarding Oftel's role - although some recognised Oftel as a watchdog body for the telephone industry, controlling quality and price. For those with greater knowledge, independence was a seen as a key strength for Oftel (and similar 'Of…' bodies). However, others simply saw Oftel as a `government department':

"Yeah Oftel are like OfWat and all those. They are from the government, watching over other industries, keeping an eye on them." (Male, 30-49 years, C2DE)

Most respondents read the Oftel paragraph and this influenced their views regarding the leaflet content. After reading this section, respondents seemed to have a more positive view of Oftel and, consequently, the likely content of the leaflet. This added a greater impression of independence to the leaflet:

"I think after reading that I thought that the whole leaflet was going to be unbiased which changed by opinion of what to expect. I didn't expect all the companies to be mentioned." (Male, 30-49 years, BC1)

"Independent? Does that mean they are independent of the government to?" (Male, 50-60 years, C2DE)

A majority felt that this paragraph should remain in the leaflet. Only a few requested more detail about Oftel. These respondents felt they might check out the Oftel Internet site at a later date.

3.2.5 Who should read this leaflet?

For many, the role of this paragraph was unclear. The title seemed too obvious:

"If you've picked it up and you're reading it, you're already reading it aren't you?" (Female, 30-49 years, C2DE)

Generally, respondents felt that this paragraph would seem of more value if it were titled, 'Why you should read this leaflet'. This was felt to add extra dimensions of meaning. First, it personalised the leaflet:

"If it said 'you', you'd think 'Oh! What can it offer ME'." (Male, 50-60 years, BC1)

Second, this title would offer the reader the chance to appreciate why it might be useful:

"Tell me why I should read it!"(Male, 50-60 years, BC1)

Overall, respondents questioned the need for this paragraph in its current form. A small number felt that this paragraph, in a 'Why you should read this leaflet' form, would be most useful on the front cover:

"OK a large title so you know what it is about, then it says 'if you… and if you…'. You'd think, well maybe this could be useful." (Female, 50-60 years, BC1)

3.2.6 How to choose a mobile service

What are the most important things to think about?

Reading this list, respondents who were more knowledgeable and experienced with mobile phones, felt it was a comprehensive list of basic considerations:

"There is nothing really new in there, but it does look like the things you ought to think about." (Male, 20-29 years, C2DE)

For the less knowledgeable, this list was of great interest and seen as potentially useful:

"I didn't really think about that at all. I really only thought of call cost and whether to be pay-as-you-go or not." (Male, 50-60 years, C2DE)

For many of those using pay-as-you-go mobiles, and older respondents in particular, some of the items on the list were not felt to be relevant. Limited knowledge meant that many felt pay-as-you-go mobiles varied little throughout the day in terms of call costs:

"To tell the truth I know it is more expensive at night but I only want pay-as-you-go so I don't really have much choice." (Female, 30-49 years, BC1)

These respondents suggested highlighting that cost options exist for both pre and post-pay packages.

As well as providing prompts for first-time mobile buyers, many respondents felt that this was also relevant for more experienced mobile users. Most felt that they were using their mobile more often and at different times than had been initially anticipated. These respondents felt the list acted as a reminder to re-evaluate their current tariff:

"I did plan to use my phone in the evenings only, with free calls. Since I've had it I've started using it a lot more [than planned]. So reading this makes me think I should have a rethink." (Female, 30-49 years, BC1)

None of this material was queried in terms of relevance, although many felt that there was `nothing new'.

In terms of language, respondents had no difficulties. All recognised terms such as mobile internet services – although few had any experience. Networks and coverage were also clearly understood, although respondents tended to refer to coverage as 'signal'. Only the term 'non-standard' calls proved confusing, even for experienced respondents. Many were unsure regarding what actually constitutes a non-standard call. It may be of value to highlight examples of these types of calls:

"Is that text-messages as well?" (Male, 30-49 years, C2DE)

Generally, respondents saw the list as useful both for first-time buyers and the less knowledgeable user in particular - and also as a valuable reminder for more experienced mobile buyers.

How can I compare prices?

A significant number of respondents were initially disappointed when reading this section. The title had suggested the possibility of viewing price comparisons across networks. In hindsight (after discussion), however, most accepted and agreed with the explanation given in the first paragraph:

"Yeah that's true I suppose. New packages appear all the time so they couldn't keep up." (Female, 30-49 years, C2DE)

Given their initial expectations, respondents were genuinely interested in the information provided. A majority knew of independent magazines, with many quoting Which? as a valuable source for independent market information:

"That's the one you always see. Which? Washing machine and all them. So I suppose their ill be one for mobile phones." (Male, 50-60 years, BC1)

For a majority, however, `technology' magazines were not seen as a genuine source of independent information – and only 'techies' were frequent purchasers of this type of magazine. Only a very small number of respondents had ever purchased magazines about mobiles phones. Interestingly, these 'techies' felt that they were already knowledgeable enough about mobiles to negate any need for magazine inputs.

Most had not heard of 'Best-buy calculators' and, therefore, none had made use of them. A small number had encountered these devices in relation to utilities such as gas and electric - however, for most, this information had proved very confusing:

"They use language that I've no idea what it means. Units being one of them." (Female, 30-49 years, C2DE)

"I'm not sure what a unit is, so to compare proved difficult." (Female, 30-49 years, BC1)

None of the respondents had accessed the Oftel web-site, with most believing that they*"…did not have the time…"*. However, when this was identified as being a reliable source for price comparison, many felt they would access the site as necessary:
"…definitely. Next time I want to buy a phone I'll give it a go…"

Although initially disappointed that no price comparisons were offered, a majority were still interested in this section. The headline clearly created a powerful initial level of interest and the information then proved to be both interesting as well as potentially useful.

How do I find out which mobile companies offer a high standard of service?

For most, standards of service were not a major concern, particularly by comparison with price-related information. Service was only seen as relevant if problems were encountered:

"I've never been in touch with X [provider]. Nothing has ever gone wrong." (Female, 20-29 years, C2DE)

Respondents that had encountered problems had been forced to contact their provider and service had quickly become an issue:

"I phoned them because I thought they were overcharging me on my bill. They were rude and unhelpful." (Female, 20-29 years, BC1)

"I just couldn't get through to X. the line was always engaged." (Male, 30-49 years, C2DE)

Those that had contacted their supplier were also amazed at how much they were charged:

"They should put this in the leaflet. I was charged £1 a minute to sort it out." (Male, 30-49 years, C2DE)

The title, as with the price comparison section, had led some respondents to believe they would see specific service comparisons within the leaflet. Consequently, again for some, this section proved disappointing:

"Well it just says it is something to consider but then sends you to other internet addresses! It doesn't really provide any information." (Female, 30-49 years, C2DE)

In reality, however, a majority accepted that realistic comparison was not possible. The information provided was considered adequate and useful for those who wanted to compare service providers. For most these comparisons were not especially interesting, although most felt that this section should still be included:

"Well it is there [the information] if you want it isn't it, you just have to go and look for it." Male, 30-49 years, C2DE)

Interestingly, respondents who used their mobile for work purposes, especially while travelling, were more interested in these comparison statistics:

"That would interest me. I have an area I travel in regularly and service and coverage is important. Yes I would look to see whether I'm using the right provider for these areas." (Male, 30-49 years, C2DE)

Some respondents felt that mobile phone company web-sites would be unlikely to offer an independent view of service delivery. Consequently, most felt that the Oftel web-site was likely to be of more helpful.

Overall, a small number of respondents felt that this section was potentially useful. However, some believed that they may also access the Oftel site out of curiosity.

What are the different ways in which I can pay?

Before reading this section, most respondents were certain that they already knew everything about different methods of payment:

"Well it's pay-as-you-go or contract basically." (Female, 30-49 years, C2DE)

Equally, after reading, many respondents initially felt that they had learned nothing new. However, in discussion it became clear that most had not been aware of the 'Pay up-front' option previously. Furthermore, after reading the relevant section, many were still confused:

"I'm not sure what it is even now." (Female, 20-29 years, BC1)

Respondents wanted more explanation of this method of payment:

"At the moment I'm unclear as to whether this is an option to consider. I really don't know what it is saying." (Female, 20-29 years, C2DE)

"I'm not sure how it is different to the other two, other than it having bits of both. What does it offer me?" (Female, 20-29 years, BC1)

The sections on 'Monthly Contract' and 'Pre-pay' were felt to be clear and straightforward. Respondents did, however, ask that a common approach be used for their titles:

"Well pre-pay, I'm assuming, is pay-as-you-go? They should just say that, even if it is in brackets." (Female, 30-49 years, C2DE)

"Pre-pay just offers that little bit of confusion. It makes me think, 'what do I do? Ah yes I pay before I call. That is pre-pay'." (Male, 50-60 years, BC1)

All respondents felt this section was important and worth including in the leaflet, particularly considering the presentation of a new payment option. Many felt this option could be of potential value both for first-time mobile buyers and those looking to change payment plans.

3.2.7 How can I control the cost of my mobile service?

This section seemed, initially, to be the most important information area for respondents across the whole sample. Many were using their mobile much more frequently than had initially been intended. Consequently, many respondents were keen to discover how to spend less:

"I'm always spending too much. Anything that would let me control this would be very interesting!" (Female, 30-49 years, C2DE)

Respondents had expected, or at least hoped, that this section would actually provide tips for cutting mobile costs. Again some were disappointed:

"When I saw the title on the contents page I thought, excellent something that might give me a few tips on saving money here and there." (Female, 30-49 years, C2DE)

After consideration, however, most respondents recognised that controlling spending was a personal issue and that the leaflet could not realistically offer any secret answers beyond the obvious information that was provided. On reflection, most respondents did believe that the section contained useful and usable information.

What does it cost to call people on other networks?

Most respondents were aware that calling other mobile networks was more expensive. However, most were surprised that it could be three times as expensive or more:

"No way! Really, that is ridiculous. How do they justify that?" (Male, 30-49 years, C2DE)

Many respondents, particularly younger and the more 'mobile aware', were aware of packages that included inclusive minutes for calls to other mobile providers. Only a small number currently used these types of packages.

As has been noted in previous mobile research, a majority of respondents are 'carefree' mobile users - if a call needs to be made then they make, it irrespective of cost. It is unlikely that many respondents would change packages unless major alterations occurred in competitive payment plans – for example, free local calls. Consequently, this section of the leaflet, although of interest, was unlikely to significantly affect respondent behaviour or attitudes.

What is included with monthly line rental?

Again younger and more mobile-aware respondents felt that this was mostly `old news'. Less knowledgeable respondents showed more interest. Although the issues outlined in this section were mostly topics with which respondents are already familiar, many had not actually considered these factors when purchasing their mobile phones:

"I don't know. When you go to buy one you sort of get dazzled by the salesman and get told this is best for you and you take it." (Female, 50-60 years, BC1)

Therefore, many felt that these points would be useful for future reference:

"I'd feel a bit more aware after reading this. Ask about free minutes and all that." (Male, 30-49 years, BC1)

Most were unaware that more than one handset could be used on a single account. This was seen as an excellent option, particularly for married couples. However, some clarification was needed:

"I'll definitely look into that, but do you get different numbers on the same account? It should say here." (Male, 30-49 years, BC1)

How much will it cost to use my mobile phone abroad?

A majority of respondents had not (and did not) want to use their mobile abroad. Many simply did not want to be bothered while they were relaxing:

"I don't want people calling me when I'm on holiday." (Male, 50-60 years, BC1)

"I'm on holiday. I particularly don't want work ringing me. So I don't take it [mobile] abroad." (Female, 30-49 years, C2DE)

Others had heard that calling costs from abroad were *"…very expensive…"* and, therefore, avoided taking their mobiles on holiday.

Those respondents who had taken mobiles abroad were surprised by the cost of both making and receiving calls:

"It was ridiculous. One short call and it was about £12." (Female, 50-60 years, BC1)

The introductory paragraph confirmed respondents suspicions about call costs and expense - in addition, it also provided some new information. Many older respondents, with less mobile experience, were surprised to find that they would pay for both receiving and calling:

“I just called my grand-daughter abroad. So I suppose I’ll expected a bloody huge bill now will I.” (Female, 50-60 years, C2DE)

“I was really surprised. My niece called me, because she was house sitting. When I got home the cost was on my home phone bill and my mobile. It was a bloody fortune.” (Female, 30-49 years, BC1)

All felt that this issue should be highlighted:

“I don’t remember that being in my mobile handbook.” (Male, 30-49 years, BC1)

Although some were interested in the tips about saving money when abroad, most were too frightened by potentially large bills to even consider taking their phone overseas. The tips were , however, considered useful for those likely to use their mobiles in other countries.

The tip relating to ‘SIM-cards’ proved confusing for some. Older respondents had heard of SIM-cards but we unaware that they could be removed and substituted. Most respondents, however, felt that unless they were going abroad for a long period of time (certainly not just a two week holiday) then this would not be an option worth considering:

“It would be a bit of pain doing that just for your summer hols.” (Female, 30-49 years, BC1)

“Where would you get them from and how much do they cost. I’d have to know if it was worth my time and effort.” (Male, 30-49 years, BC1)

Generally, this was seen as information worth knowing, even though most were unlikely to act upon it.

Some respondents noted that the previous two sections appeared to focus entirely on monthly contract users and requested more information which is relevant to pay-as-you-go users:

“That is no good for me. What about me as a pay-as-you-go customer. Is it the same or different?” (Female, 30-49 years, C2DE)

“Can I do things like that if I’m abroad. Or are we the poor relations again having to pay more for calls.” (Female, 20-29 years, C2DE)

What insurance and warranties should I get?

Virtually none of the respondents had insurance for their mobile and most did not want it. Pay-as-you-go users felt that if their phone was broken or stolen then it was easily and inexpensively replaced:

“Well if someone steals it, they get the phone and twenty quids worth of credit, then what? All they get is my number or the phone is disconnected.” (Female, 30-49 years, C2DE)

Monthly contract users had found that insurance taken out with mobile providers was expensive and some had transferred mobiles to their household insurance:

“Doing that saved me a fortune. It costs me about £15 on top of my annual insurance, that’s it!” (Female, 30-49 years, BC1)

A small number of respondents had tried to claim on their mobile insurance after accidents with phones. Most had found that there was a good deal of `small print’ which meant that they did not receive either a payout or replacement phone:

"My phone stopped working after my baby son dribbled on it. I tried to claim but they said I should not have had it close to him. If I'd dropped it down the toilet I would have been fine." (Female, 30-49 years, BC1)

"They will do anything to get out of paying. It's simpler on the household insurance." (Female, 30-49 years, C2DE)

A majority were not surprised that line rentals would have to be paid even if a phone was stolen:

"Well they [insurance companies] screw you for everything don't they." (Male, 50-60 years, BC1"

Despite some negative responses to this section, it became apparent that this negativity reflected views about insurance companies rather than about the leaflet itself. Indeed, most felt that this information should be included in order to point out that mobile insurance might not represent good value. However, jaded attitudes towards insurance companies meant that many respondents were simply uninterested in the topic of insuring their mobile phone.

How much does it cost other people to call my mobile?

"Who cares?" (All)

Disinterest was a typical response across the sample. Most respondents were aware that it costs more to call mobiles from fixed lines or other networks. However, most were not concerned about this – seeing it as an issue for the caller - and felt that this section really did not need to be included in the leaflet.

What else should I know about mobile charges?

This section offered new information. Most were unaware that freephone calls from a mobile would be charged, with many believing that 0800 were free whatever type of phone was being used. All expected to be charged for 0900 calls but few knew that these were more expensive if called from a mobile phone:

“That doesn’t surprise me because they are premium rate, so you get charged, but how much more are they.” (Male, 30-49 years, C2DE)

In reality, these types of calls were rarely made by respondents from their mobiles - however, all felt that this information needed to be made clear to all mobile users:

“It just makes you aware, so you don’t get a huge surprise when the bill comes in.” (Female, 50-60 years, BC1)

Voicemail charges and peak/off-peak times for calling were reasonably well-known by most in the sample. Many were, however, unsure regarding exactly when their peak and off-peak calling times begin, particularly pay-as-you-go users. Most, nonetheless, knew that call costs varied according to time of call. Again all used their mobiles irrespective of times or costs, but contract respondents did try to make use of free air time:

“When you need to call you need to call.” (Female, 20-29 years, BC1)

“I do use it if I have to but in the evening it is free so I use my mobile instead of the landline.” (Female, 20-29 years, BC1)

Some monthly contract users had organised their contract around typical times of use, particularly self employed respondents:

“My mobile is mostly in use during the day, which is usually on peak hours. I had to arrange a different tariff to get free minutes during the day but not in the evening.” (Male, 30-49 years, C2DE)

Generally, respondents felt that this section contained useful and new information, although much of it related to infrequently used (0800, 090) services and occasional behaviour.

3.2.8 How can I change my mobile service?

Switching your tariff

Most contract users were aware of this information. Some had initially sought particular tariffs and a small number had changed tariff on a number of occasions.

Pre-pay users were also aware that providers offer a range of different tariff options:

"Yeah I switched from one where I was paying a daily service charge to one where the first three minutes were more expensive but it got cheaper after that." (Male, 20-29 years, C2DE)

For many older respondents, this information was not of interest. Both their lack of knowledge about, and interest in, mobile phones meant they preferred to stay with their initial tariff option:

"It's better the devil you know." (Male, 50-60 years, BC1)

However, some had more knowledgeable children who had proactively changed their parent's tariff:

"He [my son] came home and told me he'd phoned the company and told them to change my tariff. I think I've got cheaper calls or free minutes at night now." (Female, 50-60 years, BC1)

Overall, this section was felt to be relevant and to offer information which potential mobile users would need to consider. Most saw this section as valuable.

Changing you mobile phone company

Many respondents had changed mobile phone provider at some time. This tended to be triggered by a number of factors, including new offers, poor customer service and friends or family switching provider. Most were, therefore, aware that changing provider was possible and could be fairly straightforward:

"I have used every mobile company out there. It was no problem. Wait for the contract to run out and start again." (Male, 30-49 years, C2DE)

Keeping your handset when moving to a new mobile phone company

Although many more 'mobile aware' respondents knew that it was possible to keep handsets, a majority felt that a change in provider should be accompanied by a new, more modern, phone:

"That's part of it. After twelve months you want new technology." (Male, 20-29 years, BC1)

For the less technical respondents this section was confusing. Although there was some recognition that mobiles are 'locked', information regarding 'dual band', 'SIM-free' and 'SIM-only' was difficult to understand.

Some more knowledgeable respondents were also aware that phones could be unlocked for *"…about £20 if you know where to go…"*

Dual band was a new concept for older and less technically-aware respondents. Most were unsure if they had dual band handsets and, if they did, what that would mean:

"If I have a dual band handset does that mean I can use it on other networks now?" (Female, 30-49 years, BC1)

"Would I have to change anything to use it on X [provide]?" (Female, 50-60 years, B1)

Some respondents were interested in this issue and requested more explanation and clarification.

Both SIM-free and SIM-only were new concepts for the majority. However, these respondents felt it was:

"Two much faffing around to go changing them constantly." (Male, 30-49 years, BC1)

"Would it mean you had two different numbers, one for each network?" (Male, 30-49 years, C2DE)

However, those respondents using mobile phones for business purposes felt that this was a subject which they may raise with their mobile provider:

"I might look into this. Different providers for different areas of the country and different times of the day. It could be useful." (Male, 30-49 years, BC1)

Generally, this section headed into overly technical territory. For some respondents further explanation would be required - particularly about dual band and what it offers to the consumer. However, most respondents felt they were unlikely to change their mobile behaviour on the basis of this information. Consequently, the section was felt to be useful for the more technically-minded and some business users.

Keeping your mobile number with a new phone company

All respondents were aware that this was possible and many had, in fact, retained their number when changing companies. Interestingly, one respondent had found that she was able to change her mobile number to that of her fixed home line. Many respondents felt this was a good idea, especially as some could not remember their mobile number:

"That would make it so much easier. If it is possible then put it in here [the leaflet]." (Female, 20-29 years, BC1)

Changing your handset

Upgrading was a well understood concept amongst monthly contract users. A majority of these respondents had upgraded a number of times in recent years. All considered it important to check – as mentioned in the leaflet - whether upgrading would mean entering into a further twelve month contract. None had actually checked this in the past.

Mobile phone trade-in value was a less well-known concept. A very small number had enquired about this but only one had actually traded-in a phone:

"It's right what it ways here. I had to have everything with it, charger, leaflet, everything. It was a Nokia 3310 and they only gave me fifteen quid." (Female, 30-49 years, C2DE)

Respondents felt that these typically low trade-in values should be indicated more clearly in the leaflet:

"Just a little sentence added in to say trade-in values are very low." (Male, 30-49 years, BC1)

Many respondents were interested in the notion that phone companies and retailers might store SIM-card information. Only two respondents had actually been offered this service. It was certainly seen as relevant - one respondent had lost all numbers after their phone was stolen:

*"I was so ****ed off. I didn't know what to do most were business numbers. This would have been ideal but no one has ever told me about it." (Male, 30-49 years, C2DE)*

There were some concerns about the security of such a system, so the inclusion of a comment regarding this in the leaflet would be appreciated. Generally, however, respondents welcomed this new information.

3.2.9 Other mobile issues

What does the 'mobile internet' offer me?

Although a majority had little overt interest in the mobile internet – many had the ability to access the Internet but had not bothered - some had tried surfing from their mobiles and felt it was a pointless exercise. Many did, however, recognise the potential for future usage. Consequently, the inclusion of this information seemed natural in a leaflet about mobile phone choices.

What extra services are available for older and disabled customers?

This section was not especially personally relevant for any of the respondents in the sample. However, it was new information and potentially useful for those with elderly parents:

"I'm going to check this out for my mum." (Male, 30-49 years, C2DE)

None had heard of Ricability but some felt they may contact them for their brochure, to see *"…what things my mum is missing out on…"*

What can I do about mobile phone theft?

Fundamentally, respondents felt that this was extremely important information – and some felt that contact numbers should be included within the section, rather than later in the leaflet:

*"Somewhere to call immediately. Put the number here and at the back then your more likely to hit it when you are panicking or p***ed off." (Female, 30-49 years, C2DE)*

Furthermore, respondents wanted the inclusion of tips for avoiding mobile phone theft, as well as what to do if it occurs:

"I know they say put that ultr-violet pen thing on it. But is there anything else?" (Female, 30-49 years, C2DE)

Are mobile phones safe to use? / What if I have a concern about a mobile mast?

These two sections were clearly of concern to a majority of respondents. All had been made aware of the safety issues by the media. Interestingly, all felt that the information presented was the only data that could truthfully be offered:

"Well that is the thing isn't it. They don't know do they but it has to be covered to make people aware and maybe find out more." (Male, 50-60 years, BC1)

Despite this lack of a clear stance on the subject, respondents were grateful that someone in authority had at least tackled the issue and offered further sources of information.

3.2.10 Contact Details

Contact details, as in noted in previous leaflet research, were appreciated by the majority. Oftel and Ricability were the only two organisations that respondents stated that would probably contact. However, it was clear that most respondents wanted as many contact details as were relevant:

"It just gives you that feeling of knowing where to go…if you need to." (Male, 50-60 years, BC1)

A small number of respondents, while recognising that advertising must be avoided, asked for the inclusion of telephone numbers and web-site addresses for all the major mobile providers.

3.2.11 Language and tone

Respondents felt the language had been simple and direct. There had been no real concerns over the language, particularly as respondents had expected to encounter more technical jargon:

"I was worried that it would have all this jargon in there and not be able to understand it. But it wasn't like that. If I can understand it then anyone can." (Female, 50-60 years, C2DE)

Respondents did request clarification of some terms including SIM-cards, pay-up-front and dual band. This was, however, more closely related to new concepts rather than pure language issues.

Tonally, respondents found the leaflet friendly and approachable. It was considered simple enough for all to follow but avoided patronising those with greater knowledge.

3.2.12 Impact/Action

In general, respondents felt that the leaflet was aimed at first-time buyers and those with less knowledge of mobile phones. However, a majority had spotted information that was new to them. Furthermore, many respondents felt that, even for those with some experience of purchasing mobile phones, the leaflet provided material which that could act as reference and aid the purchase of beneficial future mobile deals:

"It would just allow me to be a bit more armed. When they start waffling on I'll know what they are talking about and what to ask." (Female, 20-29 years, BC1)

3.2.13 Availability

In its current design style many respondents felt that they would fail to spot the leaflet and were, therefore, unlikely to pick it up. If the cover was improved so that it highlights reasons why the leaflet should be read, then many respondents felt that the information would certainly be useful to them.

In terms of availability respondents felt mobile retailers, The Post Office, Citizens' Advice Bureaus, and supermarkets would be the ideal place to place the leaflet. Some questioned whether mobile retailers would consent to stock the leaflet - however, as these shops were generally the respondents first point of call, this would be the ideal placement point.

4. Respondents Currently Seeking to Switch Mobile Network or Package Type

This segment of the sample was broadly similar in attitude and behaviour to the main body of the sample. They were more sophisticated consumers and typically had greater experience of network providers and different mobile packages. Two were contract phone users, while the other had a PAYG mobile.

Interestingly all believed that the leaflet would be useful for their own needs – even though they were more experienced, they did not claim to have an encyclopaedic knowledge of the mobile marketplace and felt that they would benefit from an independent reference source.

As with the main sample audience, these respondents had not sought out independent sources for information regarding their decision. There was feeling that the mobile market is complicated and all the respondents were focussing on particular aspects of their own mobile usage – particular handset options, coverage issues and benefits in terms of inclusive free air-time.

All claimed to be aware of most of the information offered by the leaflet, but were pleased to see all the issues drawn together in a single publication. Know knew of any comparable source for independent information.

Despite their claim that they were aware of the information offered by the leaflet it was clear that all the respondents had read the document in great detail. One admitted that he was actively using the information to inform his current decision:

"I've found the section on `What is included with monthly rental?' really helpful – it has given me a checklist when talking to phone retailers. You can't always think of everything when you're in a sales situation, so I took this along and it was very useful…" (Male, 50-60 years, BC1)

Overall, this sample segment demonstrated that the leaflet has real practical value and can contribute to a more informed set of consumer decisions:

"So many of these leaflets are just there because they have to be and no-one reads them, because they are dry and not aimed at the public. This is definitely written by someone that knows what they are talking about and I trust what is in here…" (Female, 20-29 years, BC1)

4. APPENDIX

4.1 Topic guide

Introduction

- Introduce self, company, MRS code of conduct, confidentiality and the task of the session (to review consumer leaflets), recording, video. Introduce the colleagues sitting behind.
- name, age, family, job, hobbies/lifestyle

Background – Suppliers in general

- Have you ever switched supplier, or thought about switching supplier? *E.g. gas electric etc*
- Have you all got a fixed line at home?
- Have you ever switched your home telecoms supplier, or thought about switching your home telecoms supplier?
- What prompted you to switch these suppliers? *(probe adverts, word of mouth, information leaflets)*
- How did they go about choosing new supplier? *What information was the decision based on)*
- Did you seek out information yourself or was it given to you? *Who by?*

Specifically in relation to mobiles

Individual Telephony history

- Who has a mobile phone?
- How long have you had it?
- What made you buy one in the first place?
- What type of package are you on? (prepay/post pay) why?
- Who is your current mobile telephone provider?
- Have you had past provider? Who were they?
- How long have you been with your current provider?
- How do you use your mobile? (main phone, call fixed lines only, etc.)

- Have you ever wanted/had to know your rights as a mobile consumer/or wanted more information about mobile phones in general? *What was this regarding?*

Look at any problems people have had in the past!!

- Have any of you had any problems with your mobile phone suppliers, now or in the past?
- What problems have you had with mobile suppliers?

- Did you seek out any information about your consumer rights in relation to your mobile? *If yes: where from? If no: why not?*
- What information about mobiles have you seen? *(use e.g.'s?)*
- Was this information useful? *Why/why not?*
- How did you resolve the problem?
- Did the problem make you switch suppliers?
- How did you feel about switching suppliers?
- How easy did you find it to switch suppliers?
- What difficulties did you encounter?
- What did you see before choosing your current mobile?
- Where did you see this?
- How useful was it? Why?

<u>Leaflet content</u> – General

- Before you read the leaflet, what were you expecting to find in the leaflet?
- What specific subject areas?
- What would you wanted to have read about? ***(at flip-chart – write down the areas that people wanted to know about)***

<u>Examine each section in detail:</u> Use pre-tasking forms here

Contents page

- Did any of you read the contents page? Why/not?
- Which bits on the list caught your attention?

<u>Oftel</u>

- Were you aware of Oftel prior to reading the leaflet? *Where had you heard of them and in what context?*
- Were you aware of Oftel's role prior to reading the leaflet?
- Are you now clear as to Oftel's role after reading the leaflet? *If not why not?*
- Were you interested in reading about Oftel? Why/not?

<u>Each section will be examined in turn for:</u>

- Was there too much or too little information?
- What information in this section did you already know/not already know?
- What information is missing that they want?
- What information is included that they don't want?
- Did certain aspects need more explanation? *If so, which aspects?*

- Would you be likely to contact any of the organisations mentioned in the section? *Which companies? Will they contact them shortly, or as the need arises?*
- Do you have access to the web?
- Have you ever used a best buy calculator? Would you try one?
- Did you understand the language used? *Probe:*

  mobile internet services,
  non-standard calls
  networks,
  coverage,
  best buy calculators?
  monthly contract,
  pre-pay,
  pay up front
  tariff
  rolled-over
  voicemail
  dual band

<u>Overall content</u>

- What did you think of the information contained in this leaflet?
- Who do you think it was aimed at? Why?
- Who do you think would benefit from reading it?
- How easy was it to follow/understand?
- Was/is the information useful? Why/not?
- Did it answer any/all your queries? *If not: what additional information would be needed? What was the query?*
- *What information in the leaflet did you already know/not know?*
- What information is missing?
- Did any aspects need more explanation? If so, which?
- Would you be likely to contact any of the organisations mentioned in the leaflets? Which companies? Will you contact them now, or as the need arises

<u>Impact/Action</u>

- What action did/will you take as a result of reading the leaflet
- Did it/will it change your behaviour in any way? How?
- Is there any other information that you might need in order to take action?
- Do you think that using the information presented in this leaflet will enable you to get a better deal in relation to your mobile service? Why/not?
- How likely would they be to keep the leaflet for future reference? *If not why?*

Leaflet design, layout

- What do they think of each leaflet design?
- Do you think the designs are attractive? *Likes and dislikes?*
- What do you think of the colours and pictures?
- Does the title of the leaflet reflect the content? Why, why not?
- Suggestions for improvement

Availability

- If received or saw in outlet – how likely to pick up and look? *Why/why not?*
- Where would you expect these leaflets to be?
- Where would they like to see these leaflets available?
- How likely would you be to use these leaflets? *When?*
- Have they seen any of these leaflets already? *Where?*

Internet users

- How do you use the Internet?
- Are you a home or workplace user?
- How likely are you to use the Internet to search for information? *What type of information?*
- How likely are you to use the Internet to search for information about telephony and your rights? *Why/Why not?*
- How likely to access the Internet at home to find out this information?
- How likely are they to use the Internet elsewhere to look up this information?
- Which other places would they go to?

Sum Up

- Any other comments?

COLLECT IN ALL THE LEAFLETS!!!!!!