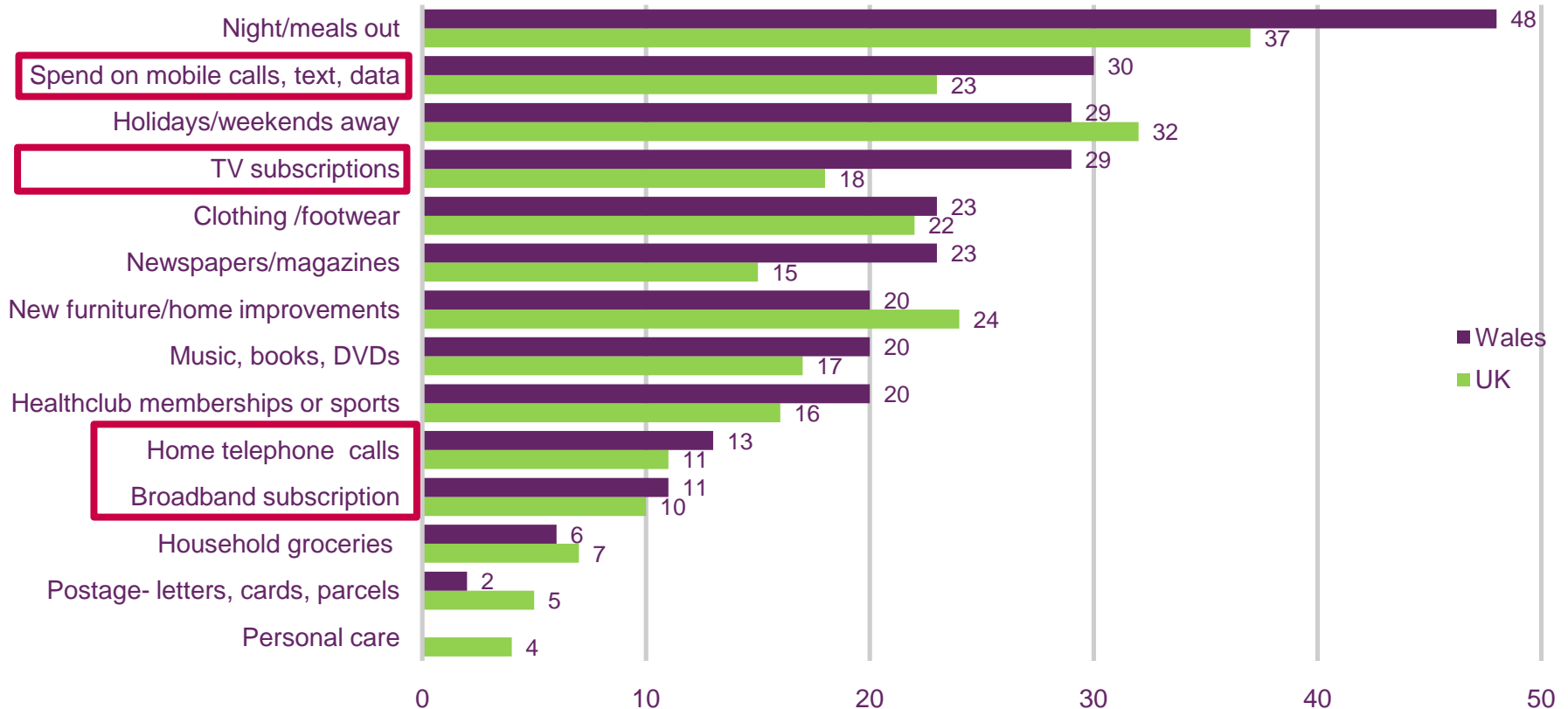


CMR Wales chart pack 2012

The market in context

1.2 Items and services where consumers would be most likely to cut spending

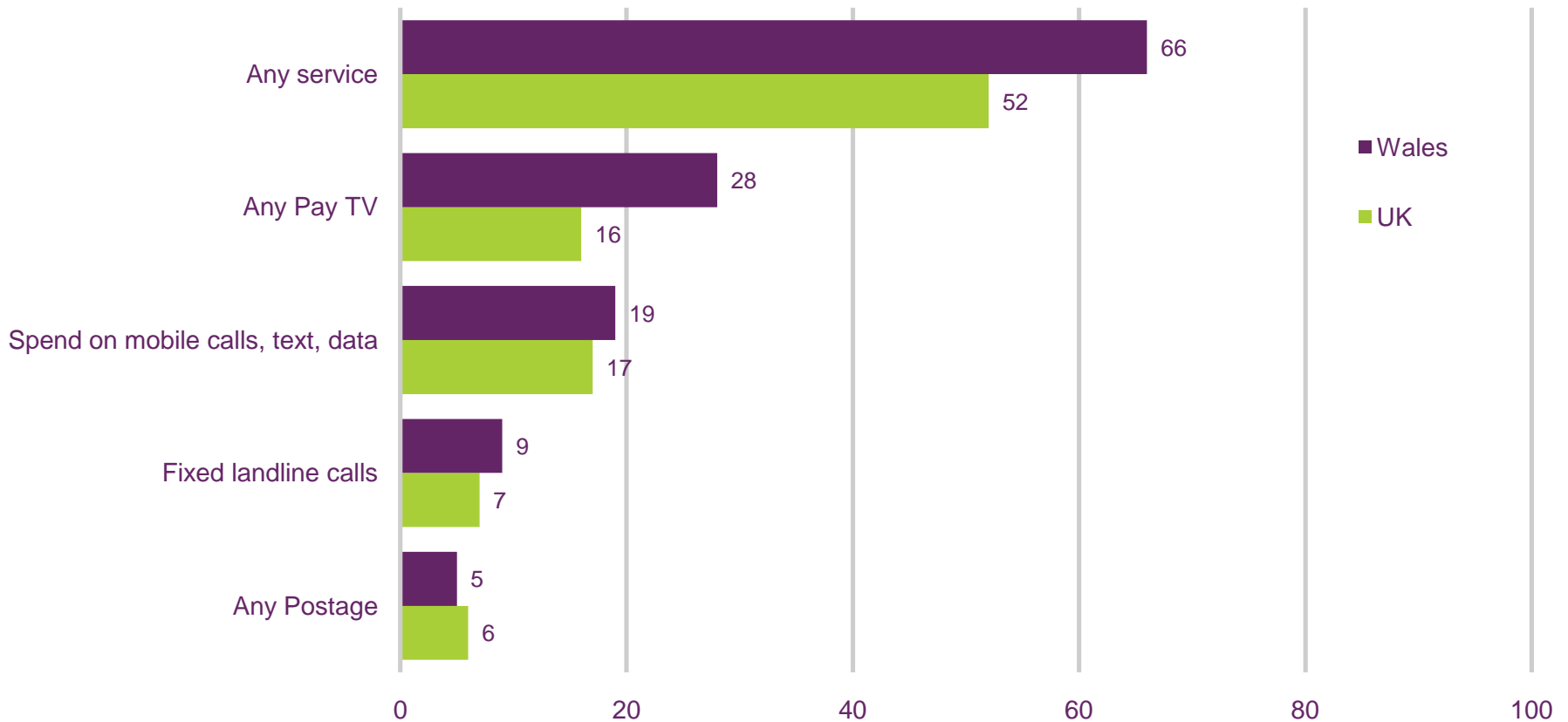


Q7/8 combined: If you were forced to cut back spending , which of the following items would you be MOST likely to spend less on? (multimode)

Source: Ofcom Attitudes toward spending research, 2012

Base: UK adults aged 16+, n = 2124 (n=2124 for UK, 1726 England, 182 Scotland, 99 Wales, 117 Northern Ireland)

1.3 Single most likely communication service to cut spending on

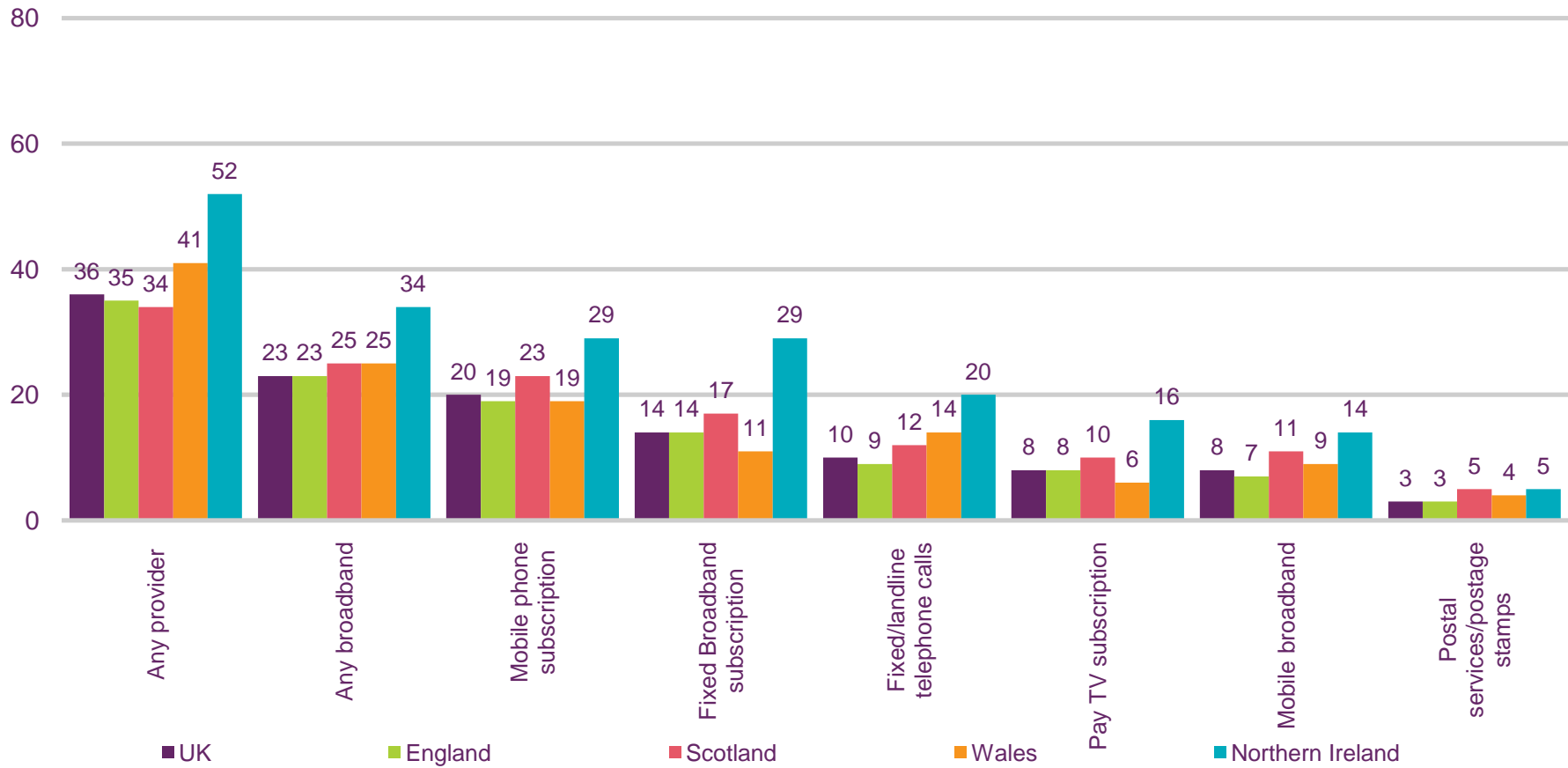


Q8/9: And which ONE of the following services would you be MOST LIKELY to cut back spending on? (single choice)

Source: Ofcom Attitudes toward spending research, 2012

Base: UK adults who have/use named services n = 2063

1.4 Services consumers are more likely to shop around for than a year ago



Q12: And which of the following are you MORE LIKELY to shop around for than you were 12 months ago? (Multi choice)

Source: Ofcom Attitudes toward spending research, 2012

Base: All UK adults aged 16+ n = 2124

1.5 Consumers' agreement/disagreement that they are more likely to take communication services as a bundle

I'm more likely to consider purchasing TV, broadband and telephone services in a package from the same supplier as it offers better value for money

Proportion of respondents (%)

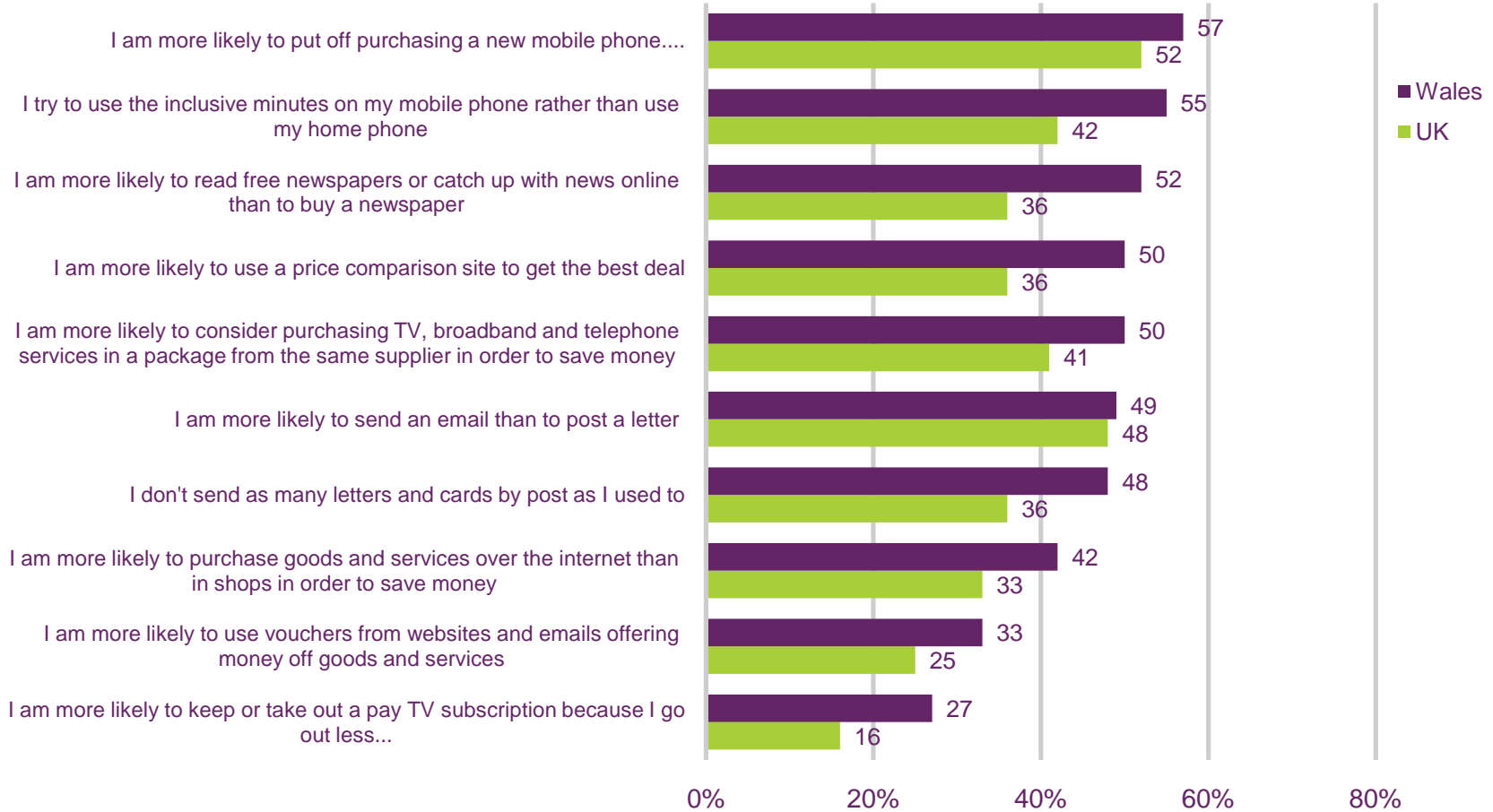


Source: Ofcom Attitudes to spending omnibus research, 2012

Q10_01: Here are some things other people have said about how the economic downturn has changed their spending on TV, broadband, mobile and how telephone services, Please tell me the extent you agree or disagree with the following statements?

Total UK adults (n = 2124)

1.6 Attitudes to spending on communication services in the economic downturn

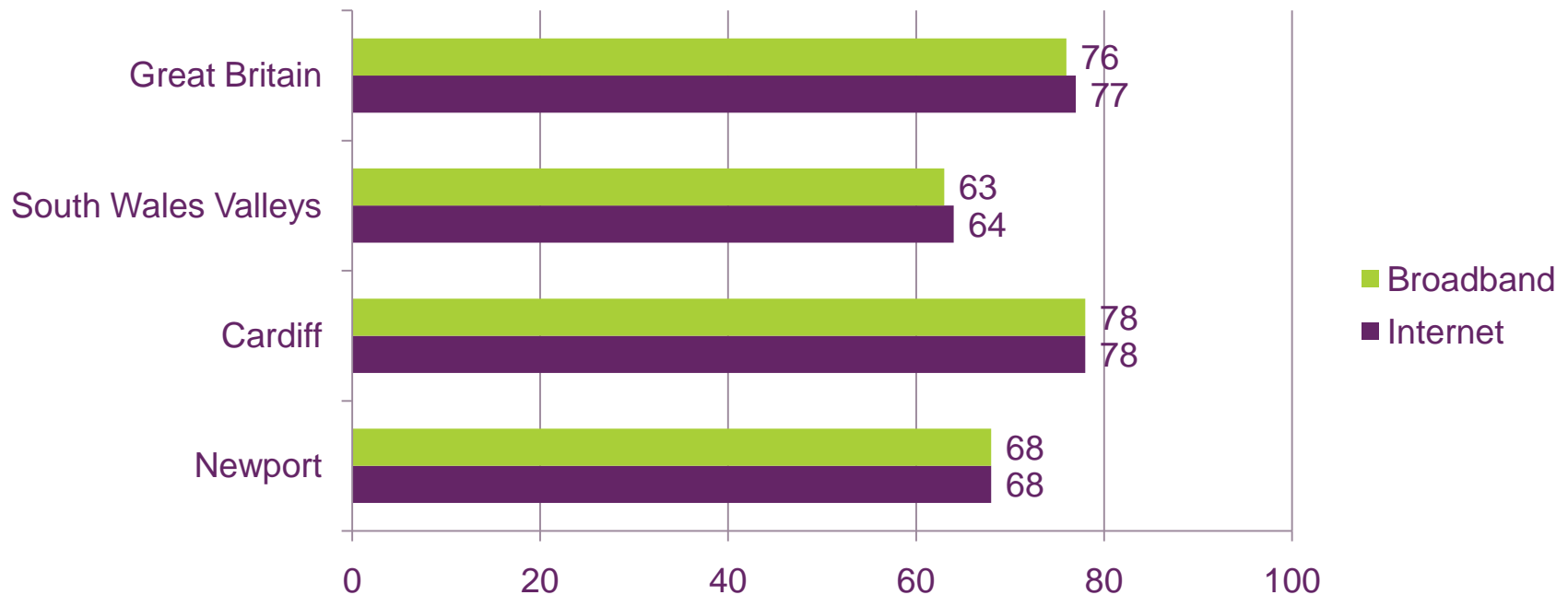


Q10: Here are some things other people have said about how the economic down turn has changed their spending on TV, broadband, mobile and land telephone services. Please tell me to what extent you agree or disagree with the following statements

Source: Ofcom Attitudes toward spending research, 2012

Base: Adults in Wales aged 16+ n = 99

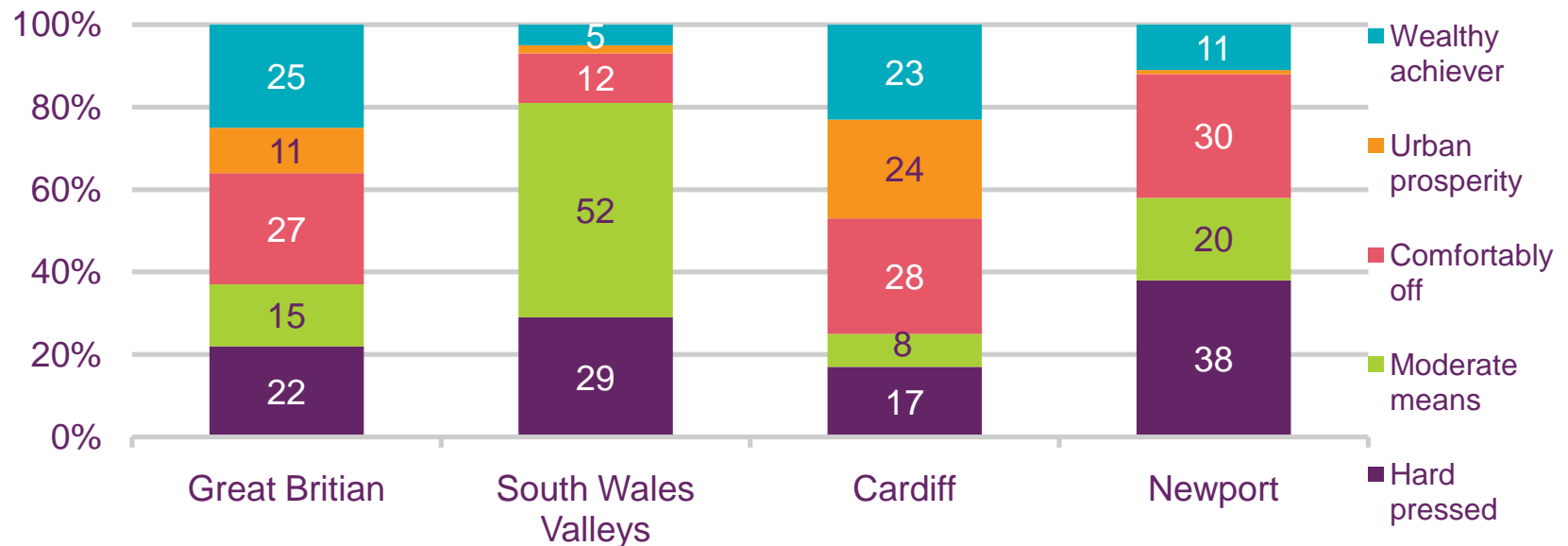
1.7 Internet and fixed broadband take-up, by area



Source: British Population Survey, January-September 2011.

Base: GB adults aged 15+, (n = 62,669 GB, 981 South Wales Valleys)

1.8 Demographic profile comparisons



Source: Ofcom analysis based on British Population Survey and CACI classifications, January-September 2011.

Base: GB adults aged 15+, (n = 62,669 GB, 981 South Welsh Valleys)

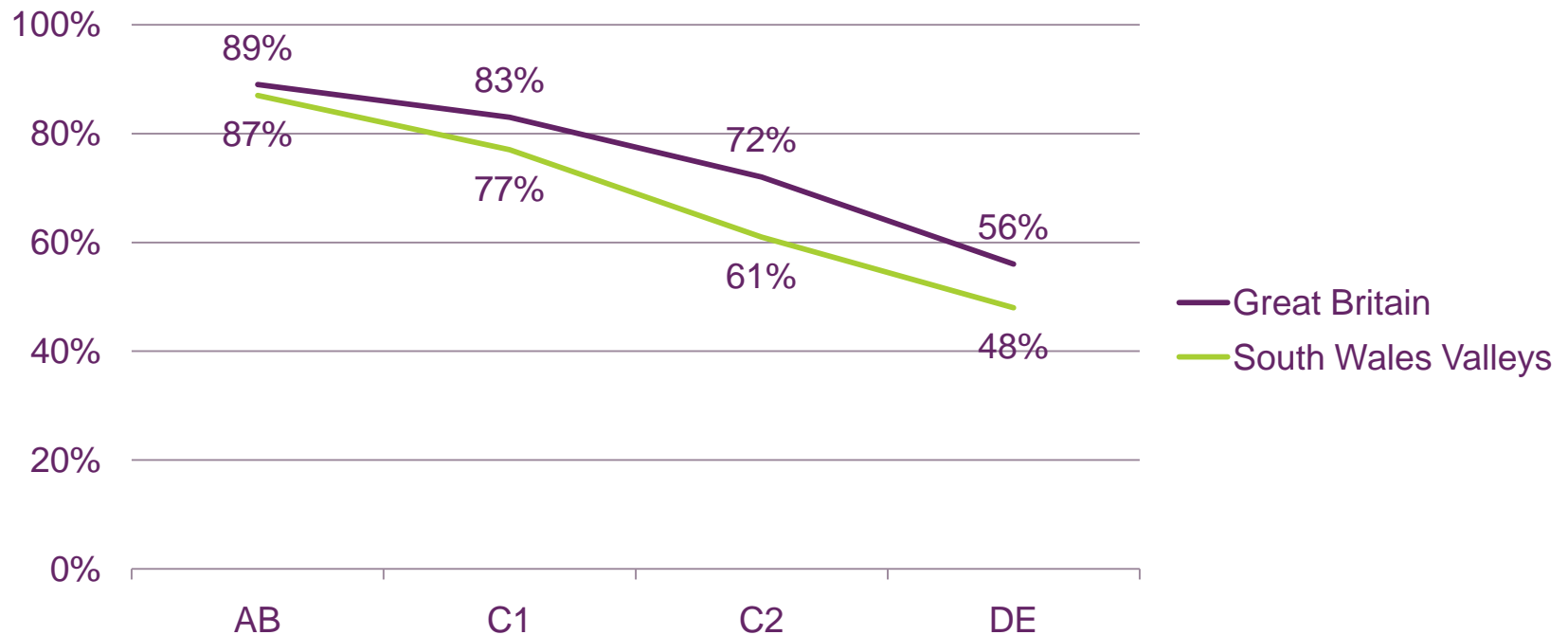
1.9 Fixed broadband take-up, by age group



Source: British Population Survey, January-September 2011.

Base: GB adults aged 15+, (n = 62,669 GB, 981 South Wales Valleys)

1.10 Fixed broadband take-up, by socio-economic group



Source: British Population Survey, January-September 2011.
 Base: GB adults aged 15+, (n = 62,669 GB, 981 South Wales Valleys)