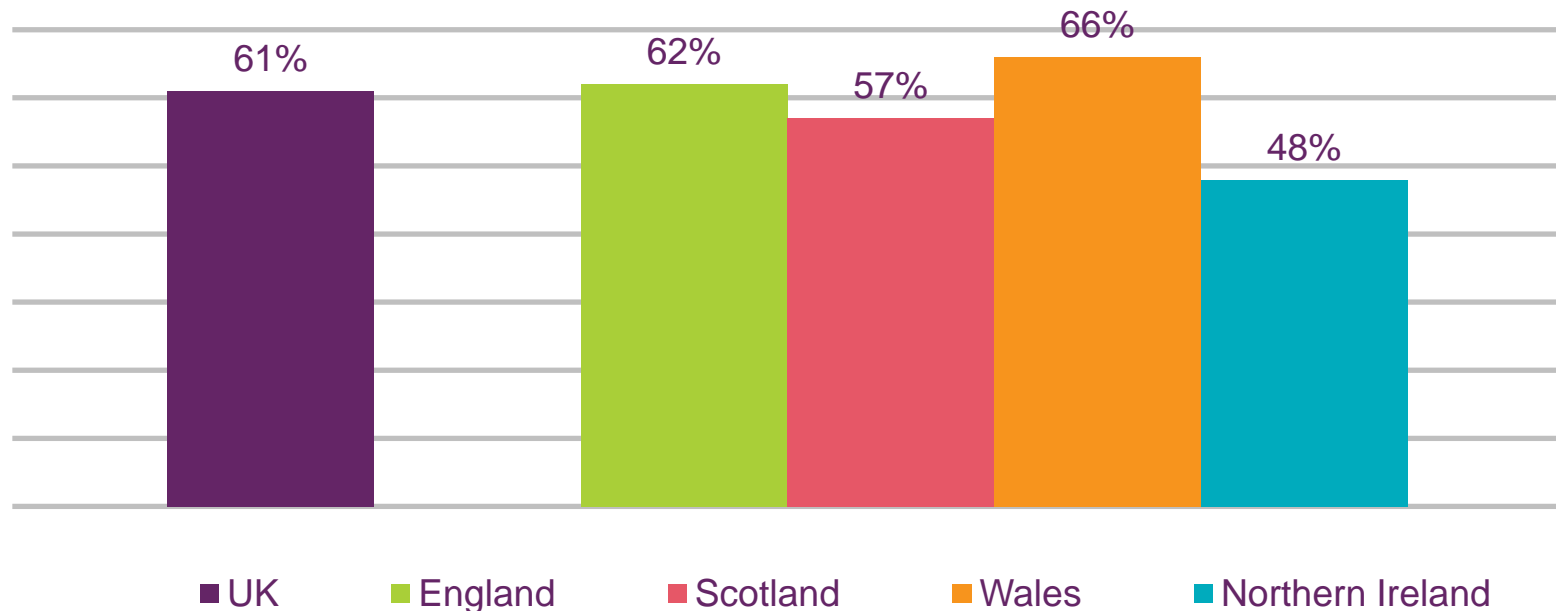


# Wales' communications market

## Figure 1.2 Proportion ‘ever’ using online government services, by nation

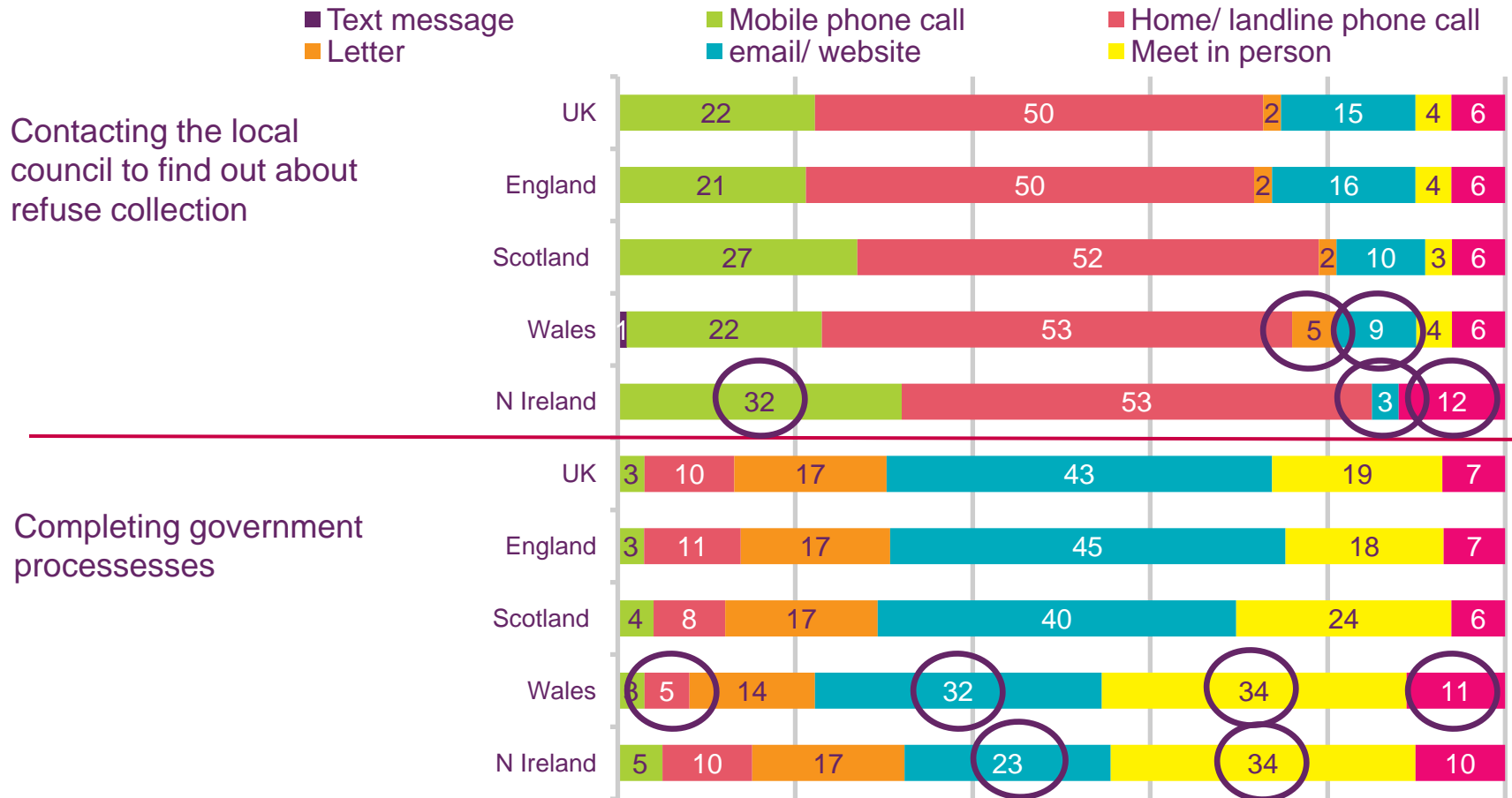
% That use services



Source: Kantar Media Omnibus

Base: All with internet access in the UK (N=2271) England (N=1325) Scotland (N=399) Wales (N=297) Northern Ireland (N=250). Question: Q.8 Nowadays, many government services are available online. Some examples of these services include <Examples> Do you ever use government online services? (Examples included paying car tax, completing tax return, applying for benefits, completing the census, registering to vote, applying for a school place etc.)

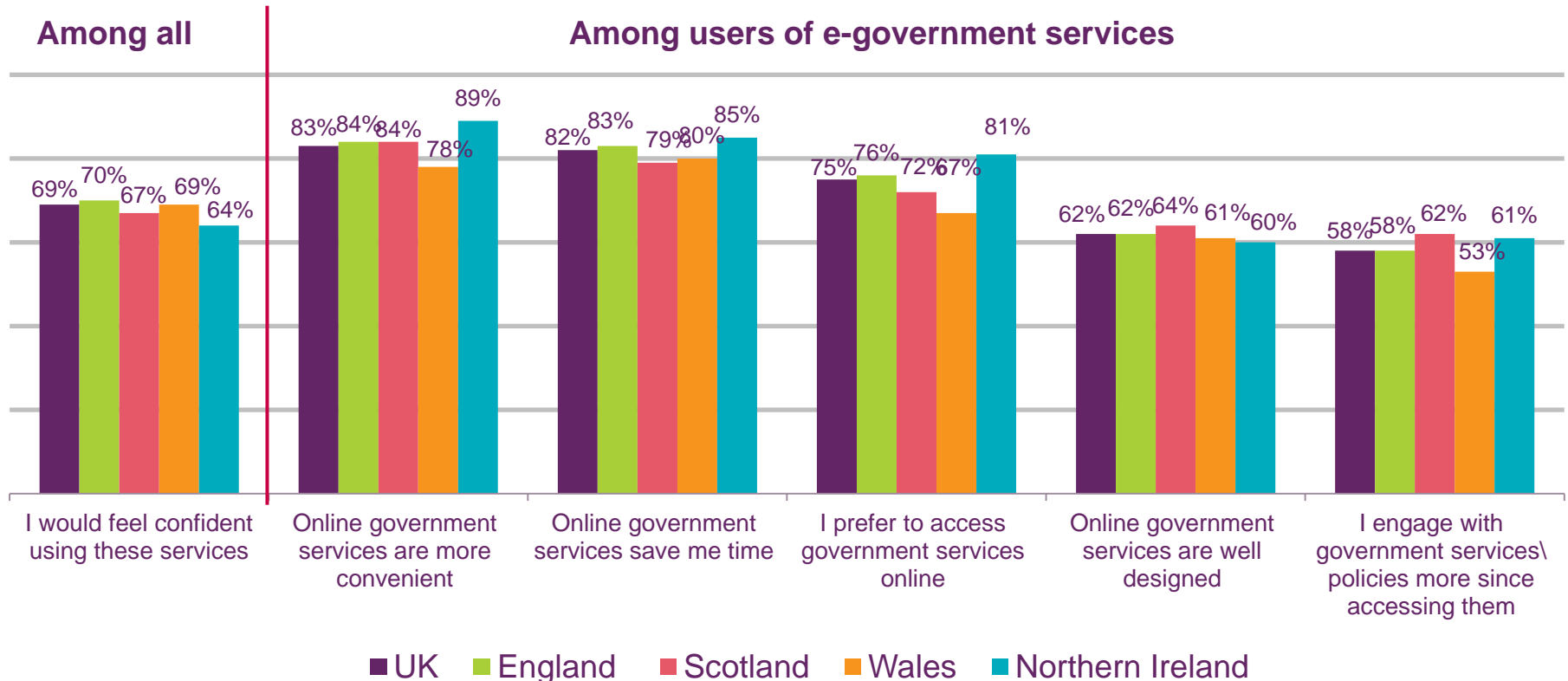
# Figure 1.3 Preferred method of contact with local council, and for government processes, by nation



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012  
 Base: All adults aged 16+ (1805 UK, 1125 England, 236 Scotland, 231 Wales, 213 Northern Ireland). Significance testing shows any difference between any nation and the UK. NZ2A-E. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded)

# Figure 1.4 Attitude towards online government services, by nation

% Agree strongly or slightly



Source: Kantar Media Omnibus

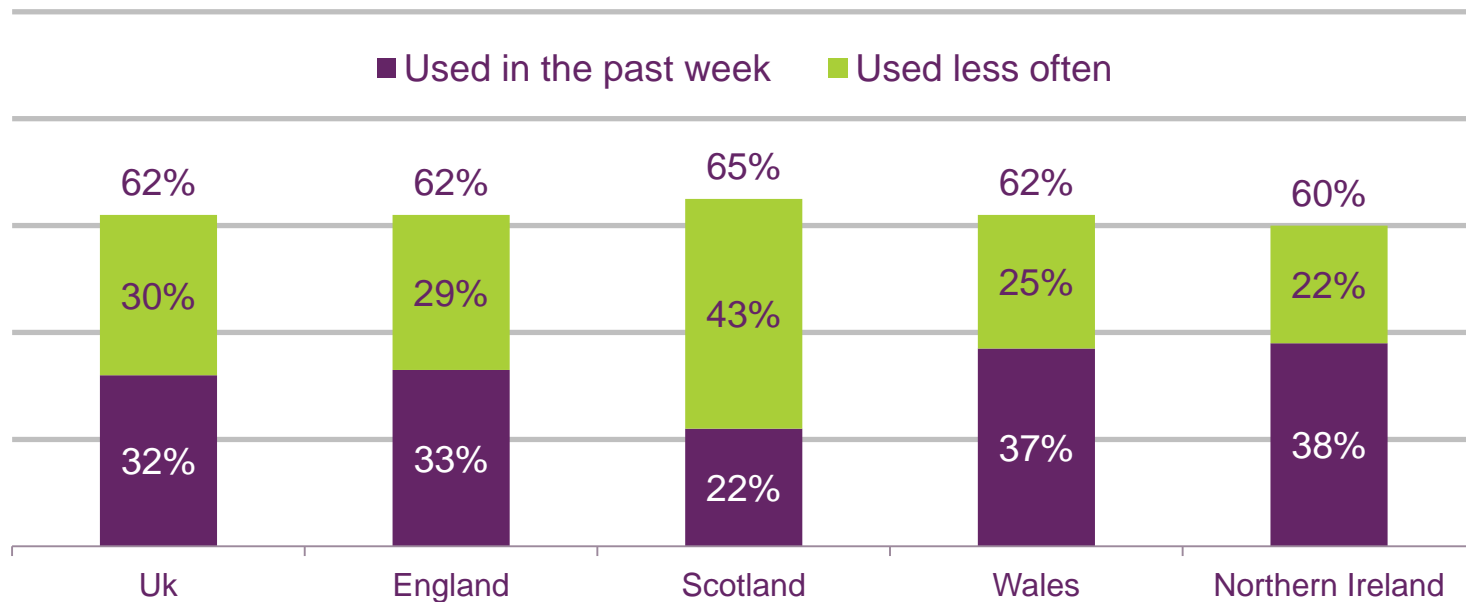
Base: All with internet access: UK (N=2271), England (N=1325), Scotland (N=399), Wales (N=297), Northern Ireland (N=250).

All ever used e-government services: the UK (N=1294), England (N=779), Scotland (N=217), Wales (N=187), Northern Ireland (N=109).

Q.9 Thinking about the kinds of services I have just shown you please tell me to what extent you agree or disagree with each of the following statements.

## Figure 1.5 Proportion of internet users shopping online, by nation

%

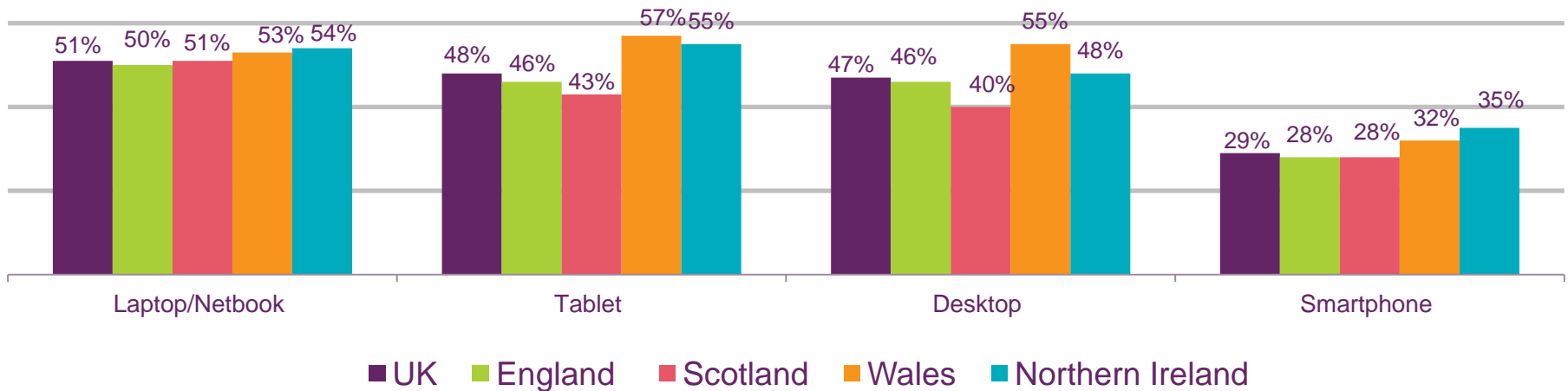


Source: Ofcom technology tracker research, Quarter 1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere 2013. % purchasing good/services/tickets etc online. (UK= 2918, England=1787, Scotland=394,Wales=361, Northern Ireland=376). QE5. Which, if any, of these do you use the internet for? Note figures in the chart below are not directly comparable to figures on internet from previous years due to changes in question wording.

# Figure 1.6 Proportion of people shopping online through devices, by nation

## Among owners of each device

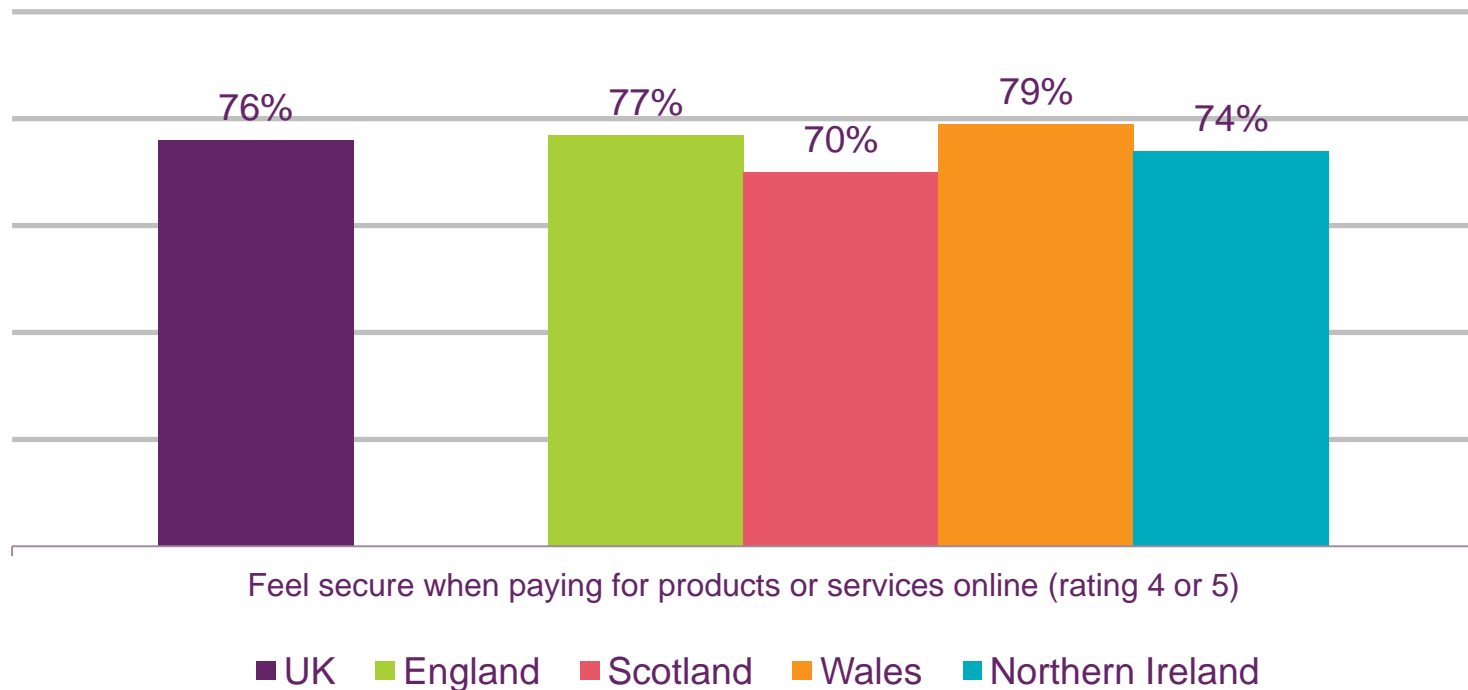


Source: Kantar Media Omnibus

Base: All who have each device. Desktop: UK (N=913) England (N=567) Scotland (N=133) Wales (N=119) Northern Ireland (N=94). Laptop/netbook: UK (N=1647) England (N=951) Scotland (N=303) Wales (N=211) Northern Ireland (N=182). Tablet: UK (N=608) England (N=334) Scotland (N=113) Wales (N=79) Northern Ireland (N=82). Smartphone: UK (N=1230) England (N=715) Scotland (N=213) Wales (N=157) Northern Ireland (N=145). Bases are 75+ respondents. Question: Q.1A Which of these activities do you use your device for nowadays?

## Figure 1.7 Perceptions of security when shopping online, by nation

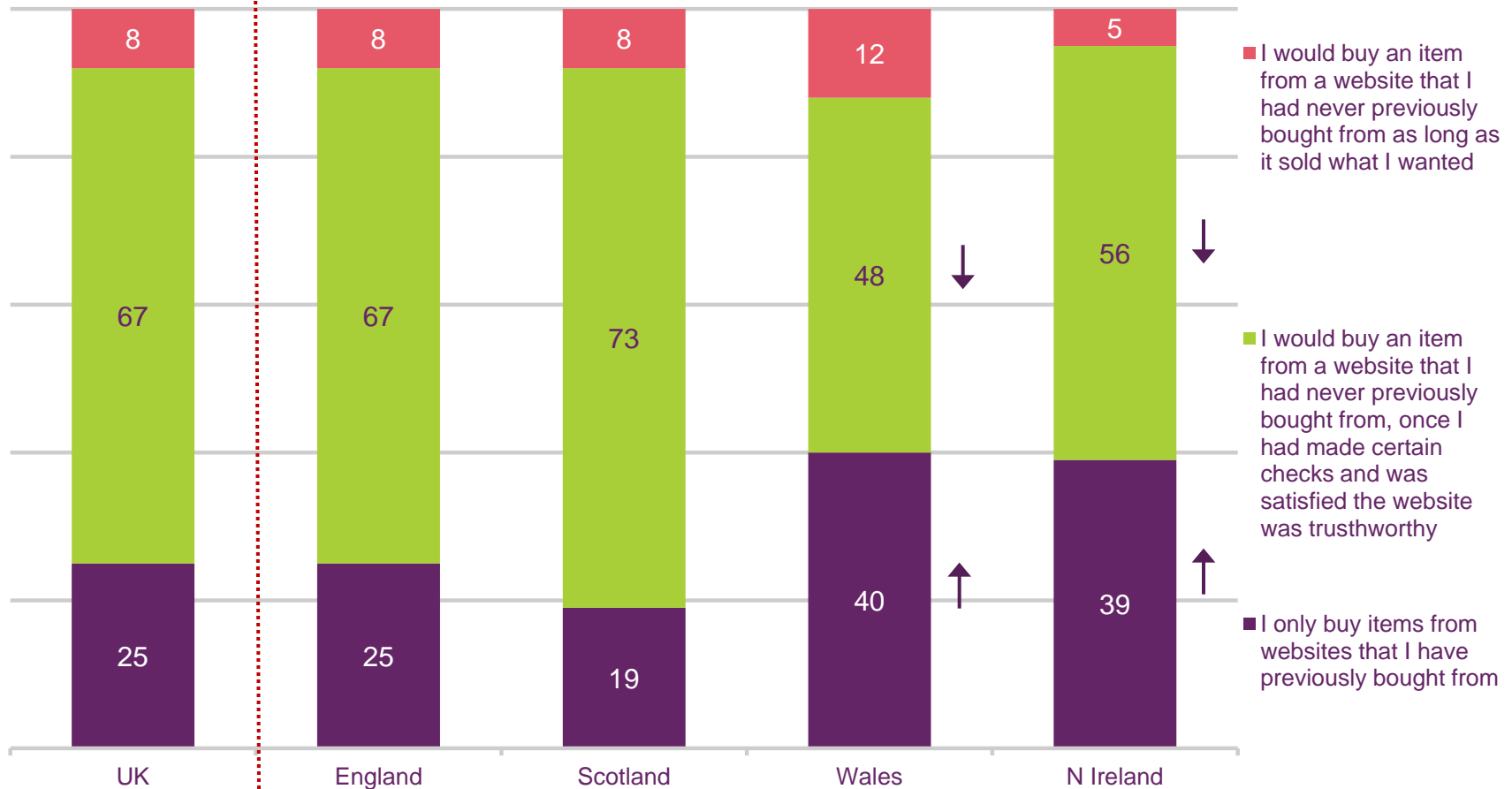
% Feel secure



Source: Kantar Media Omnibus

Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Question: Q.11A Generally, when ordering online how secure do you feel when paying for products or services online? Using a scale form 1-5, where 1 means not at all secure and 5 means very secure.

# Figure 1.8 Online shoppers' choice of websites for shopping, by nation



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012  
 Base: All who say they shop online (1076 UK, 667 England, 151 Scotland, 139 Wales, 119 Northern Ireland)  
 Significance testing shows any difference between any nation and the UK. IN33E – When you want to buy something online, which of the following statements most closely applies? (Prompted responses, single coded)



## Figure 1.9 Confidence in delivery when shopping online, by nation

% Feel confident

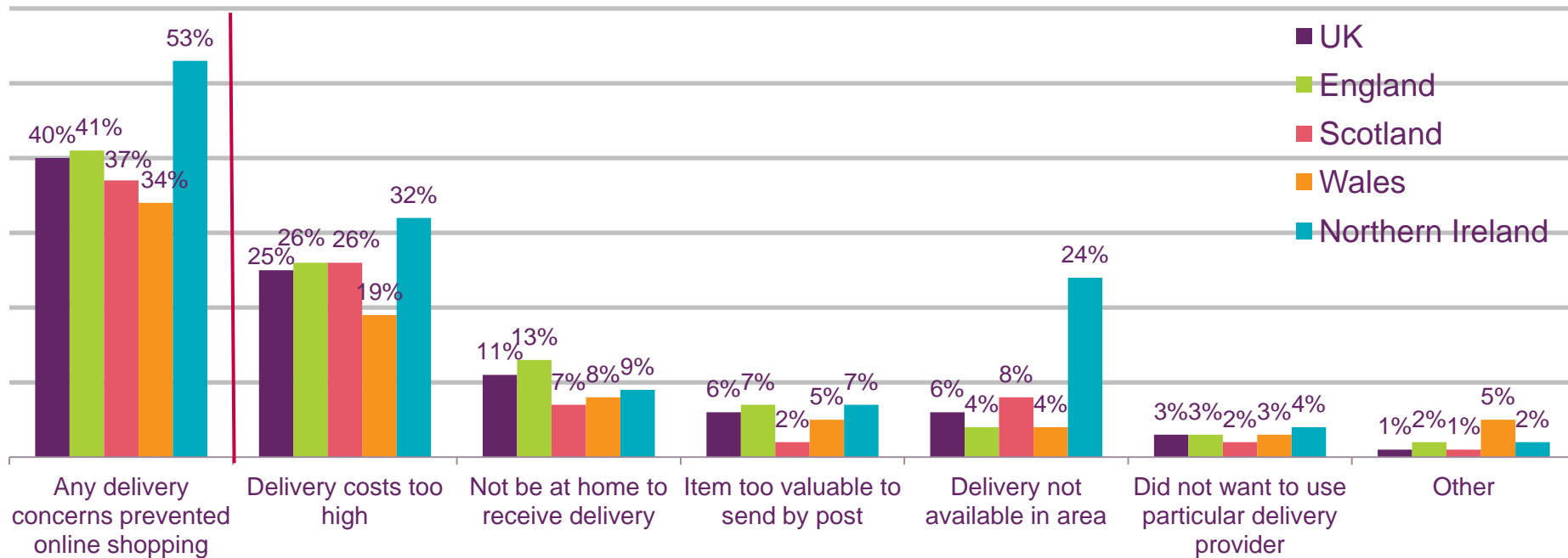


Source: Kantar Media Omnibus

Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Q.11B Generally, when ordering online how confident are you that the goods will arrive on time and in good condition? Using a scale form 1-5, where 1 means not at all confident and 5 means very confident.

# Figure 1.10 Delivery concerns preventing online purchasing, by nation

% mentioned each reason

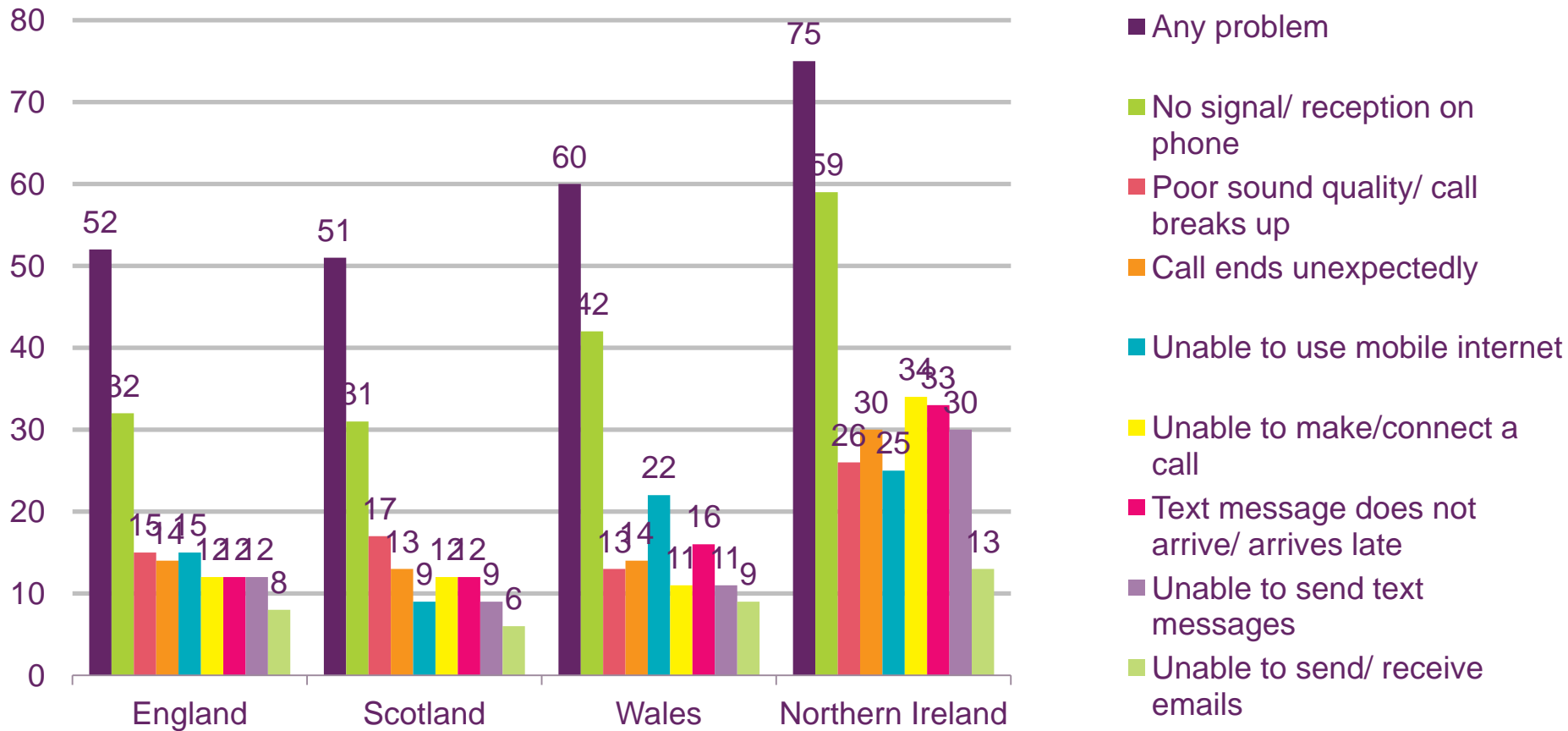


Source: Kantar Media Omnibus

Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Question: Q.14 Have delivery concerns ever prevented you from buying items online? If yes, which of the following reasons prevented you from shopping?

# Figure 1.11

## Mobile phone users who have ever experienced problems with reception



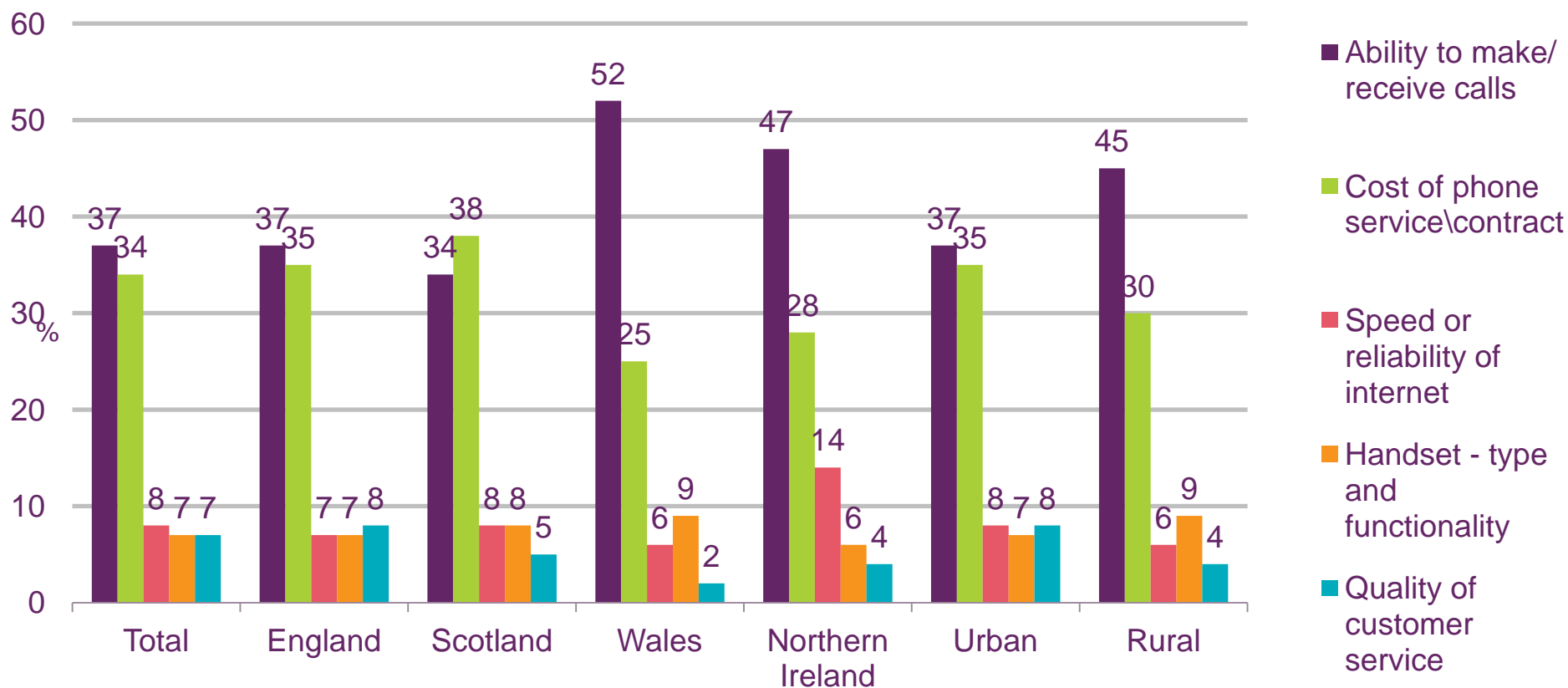
1. Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=1743/195/95/103)

3. Q13: Thinking about your mobile reception with ... in the UK, do you ever experience any of the following issues?

# Figure 1.12

## Most important element when considering mobile provider



1. Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=2136/1743/195/95/103/1757/379)

3. Q.10 And which is the ... important to you when thinking about your mobile operator? Most important.

## Figure 1.13

### City population and premises data

City	Population	Total premises	Business premises	Residential premises
Cardiff	c.341,000	c.152,000	c.8000	c.144,000

Source: Analysys Mason

## Figure 1.14

Map of area local to Cardiff highlighting city boundary

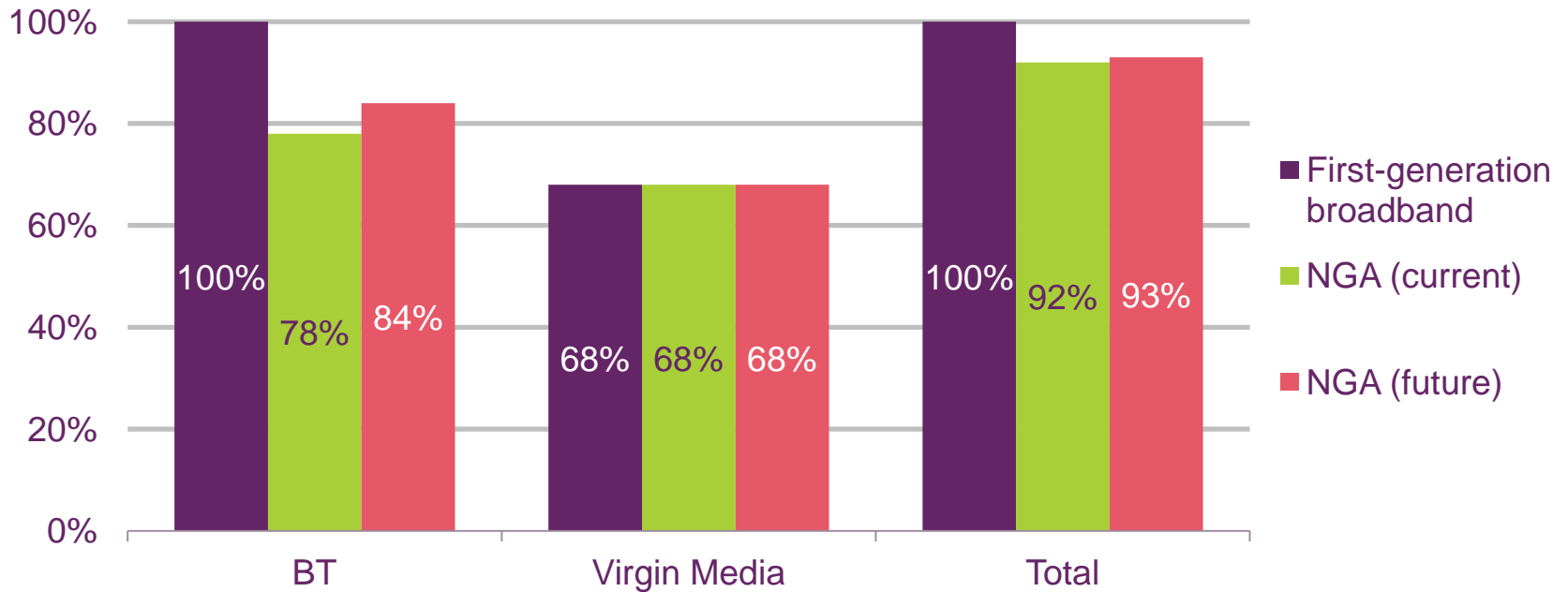


Source: Analysys Mason

# Figure 1.15

## Fixed network infrastructure premises passed availability

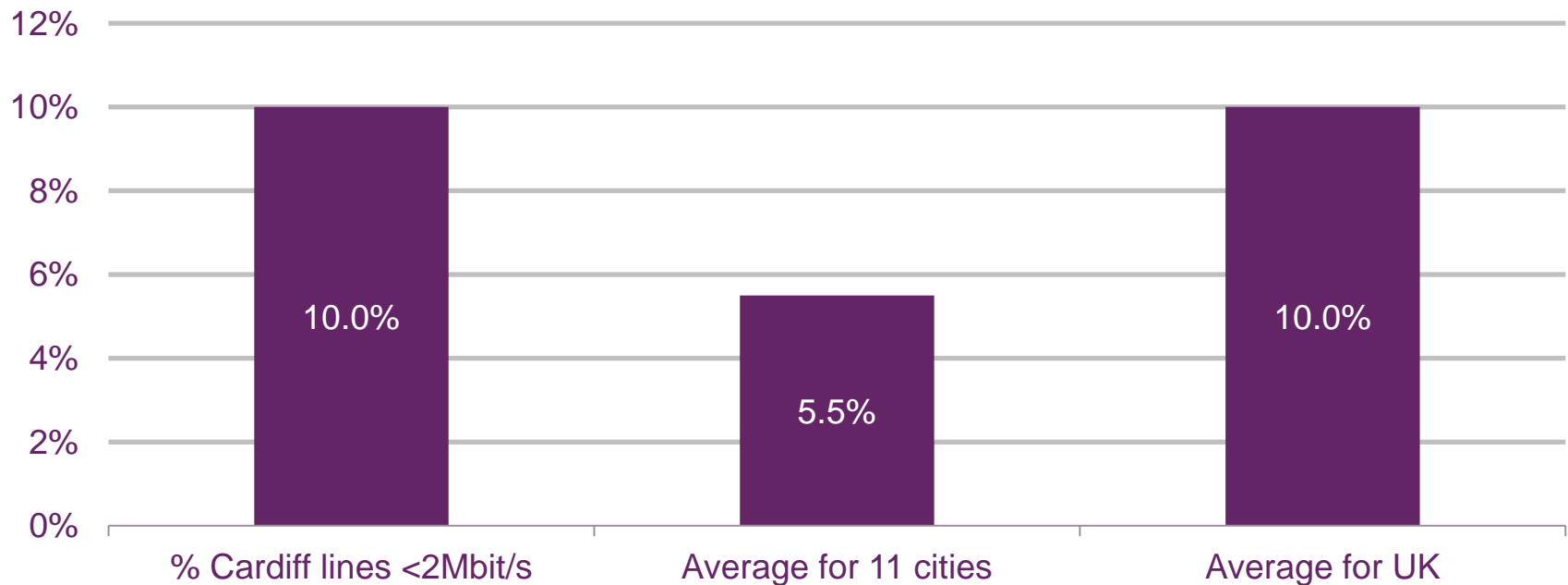
Proportion of premises passed



Source: Analysys Mason, Ofcom Infrastructure Report 2012

## Figure 1.16

Percentage of lines that have a speed of less than 2Mbit/s, and relative positioning



Source: Analysys Mason, Ofcom Infrastructure Report 2012



## Figure 1.17

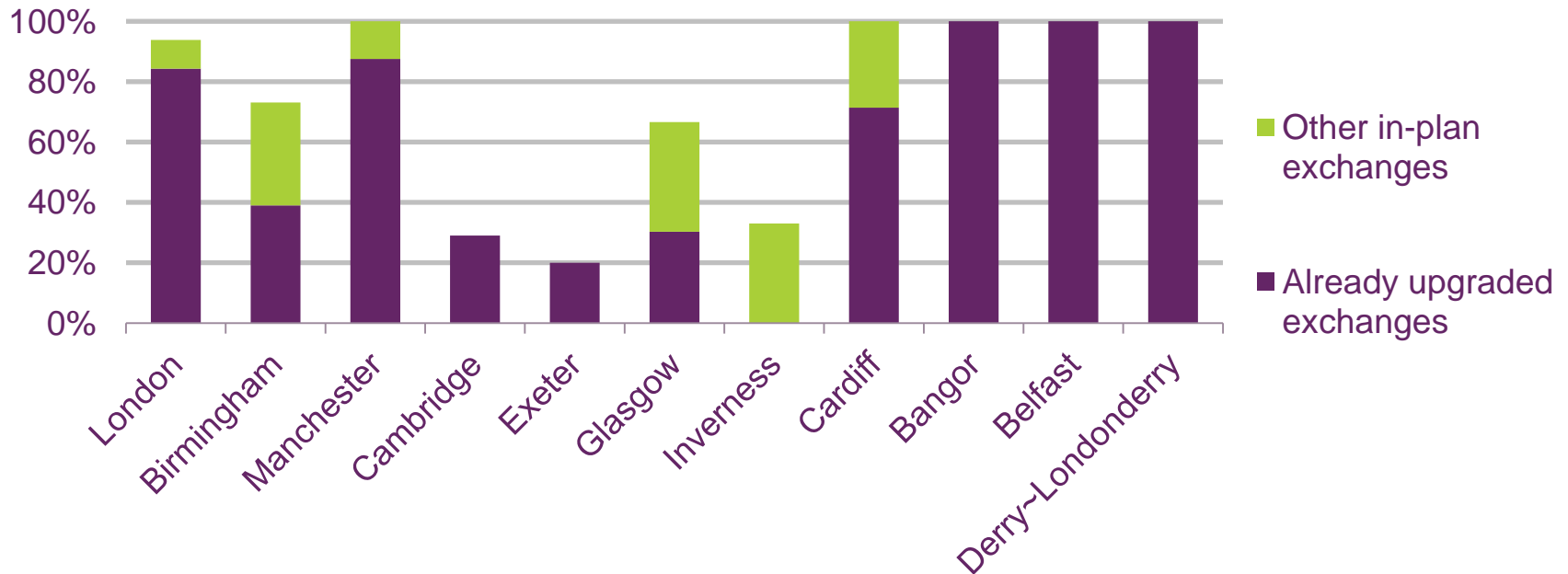
Number of exchanges and % of lines with access to basic broadband

No. of exchanges serving city postcodes	% of lines that have access to both ADSL & ADSL Max	Average number of lines per exchange
14	100%	10,800

Source: Analysys Mason

# Figure 1.18

FTTC status of exchanges serving city postcodes according to BT's roll-out plans



Source: Analysys Mason

# Figure 1.19

## Key city hotspot data

City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
240	7.1	6.2	+14%

Source: Analysys Mason

## Figure 1.20

### 3G mobile coverage in city

% of premises with 3G signal from 4 operators (city benchmark)	% of premises with 3G signal from 4 operators (11 city average)	% of premises with 3G signal from 4 operators (UK average)	Percentage difference from 11 city average
98.6%	95.7%	77.3%	+2.9%

Source: Analysys Mason ,Ofcom Infrastructure Report 2012

## Figure 1.21

### Key city exchange data

Ofcom classification	% of total exchanges	% of premises passed
3	71.4%	96%
2	21.4%	4%
1	7.1%	0%

Source: Analysys Mason

## Figure 1.22

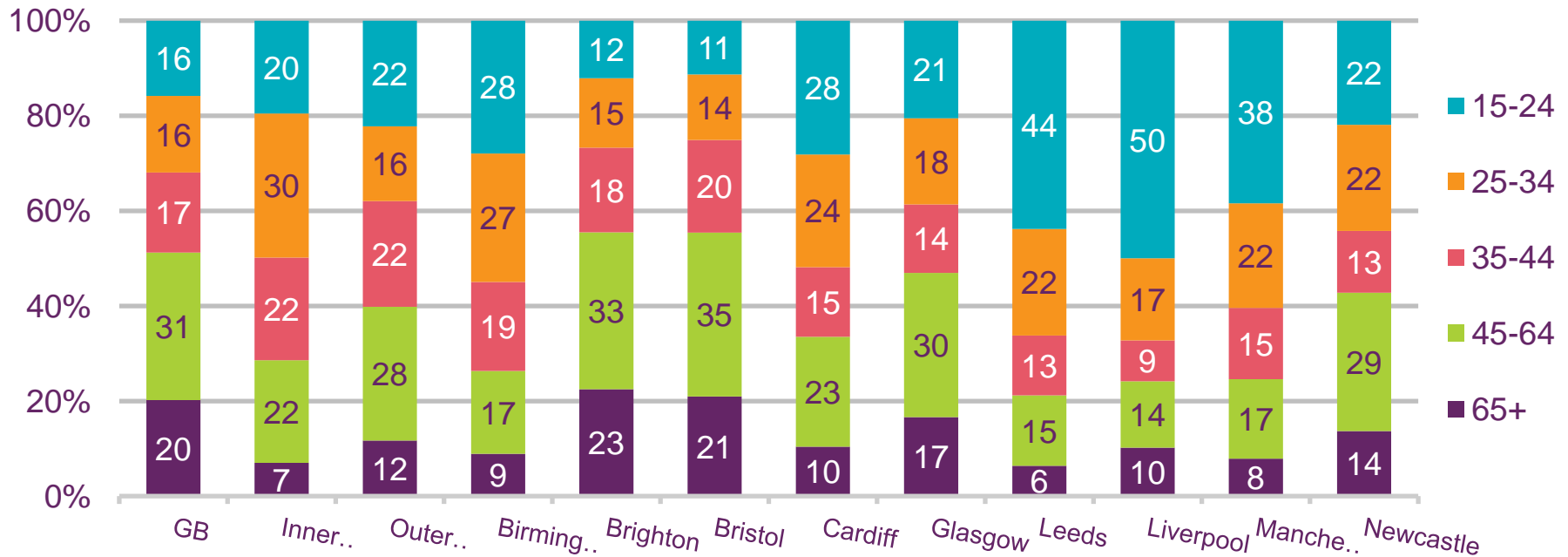
Average maximum modem synch. speed compared to other cities

Excluding SFBB lines			Including SFBB lines			
Average maximum speed (Mbit/s)	City average (Mbit/s)	% difference from city average	Average maximum speed (Mbit/s)	City average (Mbit/s)	UK average (Mbit/s)	% difference from city average
12.3	14.1	-13%	34.4	29.9	12.7	+15%

Source: Analysys Mason ,Ofcom Infrastructure Report 2012

# Figure 1.23

## City profile by age



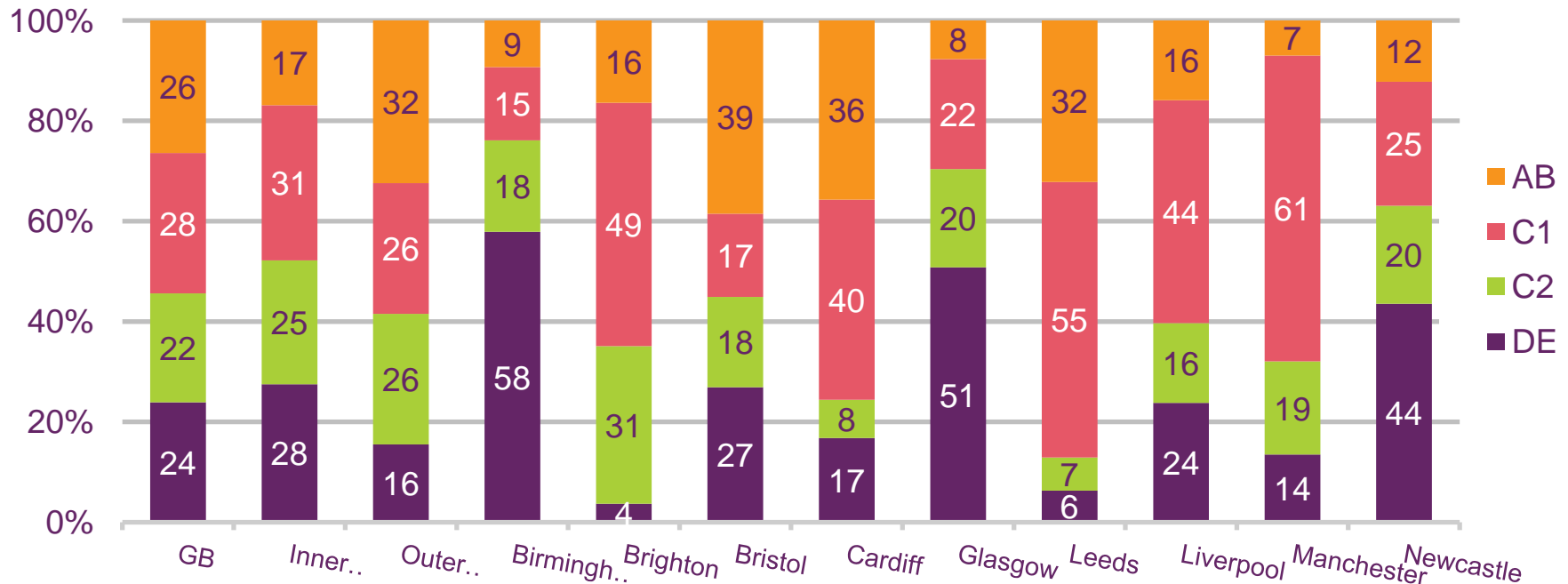
Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. How old are you?

# Figure 1.24

## City profile by socio-economic status



Source: British Population Survey

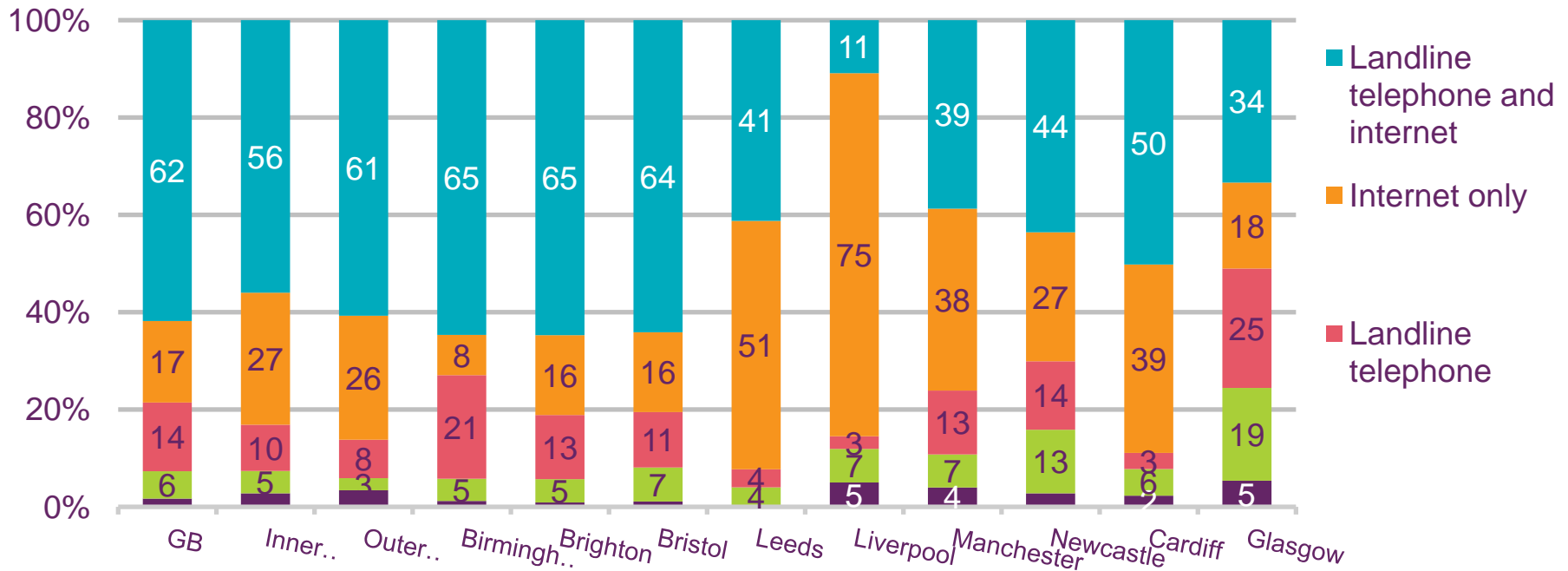
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q.Derived from questions about employment and job title.



# Figure 1.25

## Access to landline by city



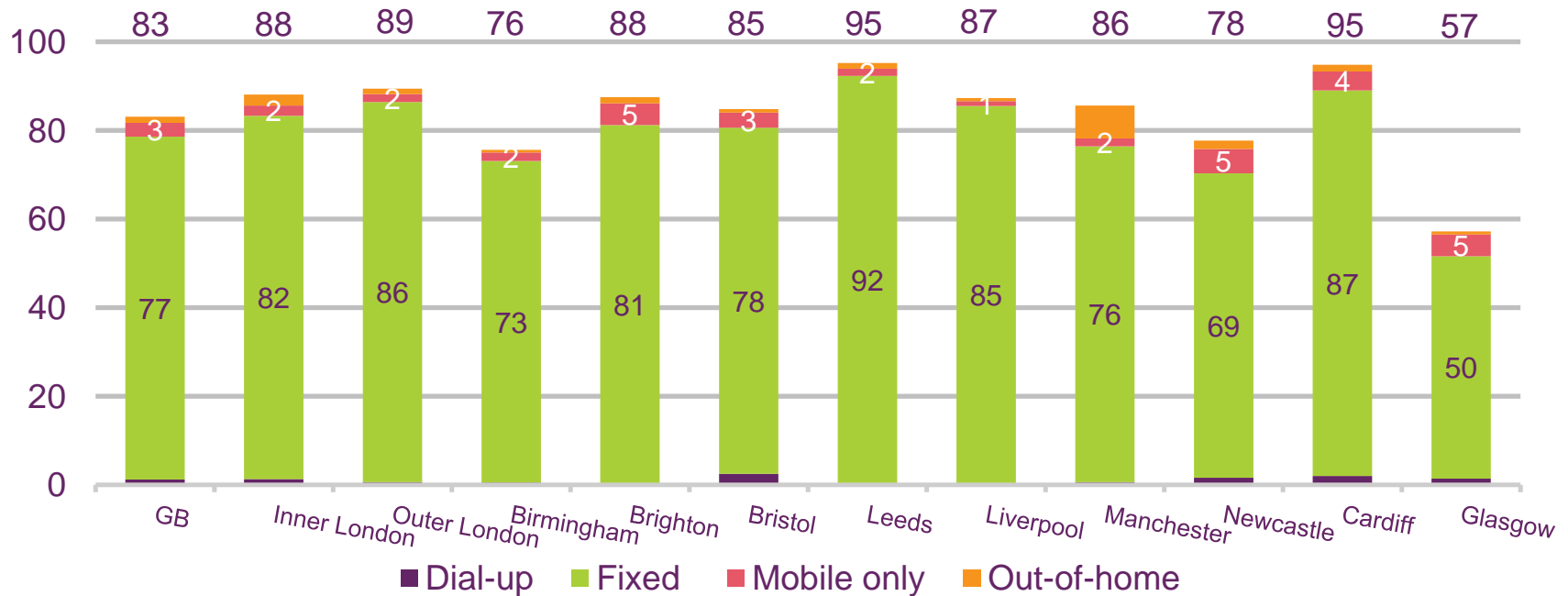
Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Kingston 496, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. Is there a landline telephone in your household? How do you access the internet?

# Figure 1.26

## Access to internet by method by city



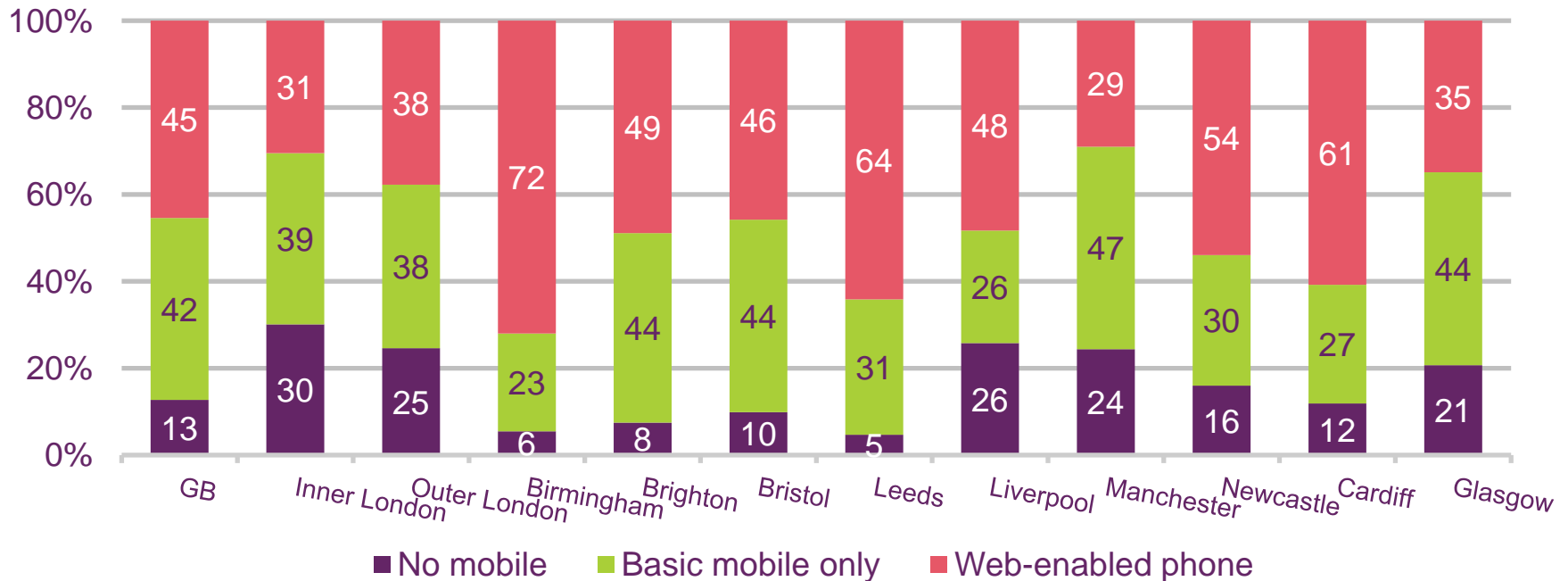
Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Kingston 496, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. How do you access the internet? Is your access to the internet at home provided by...?

# Figure 1.27

## Access to mobile devices by city



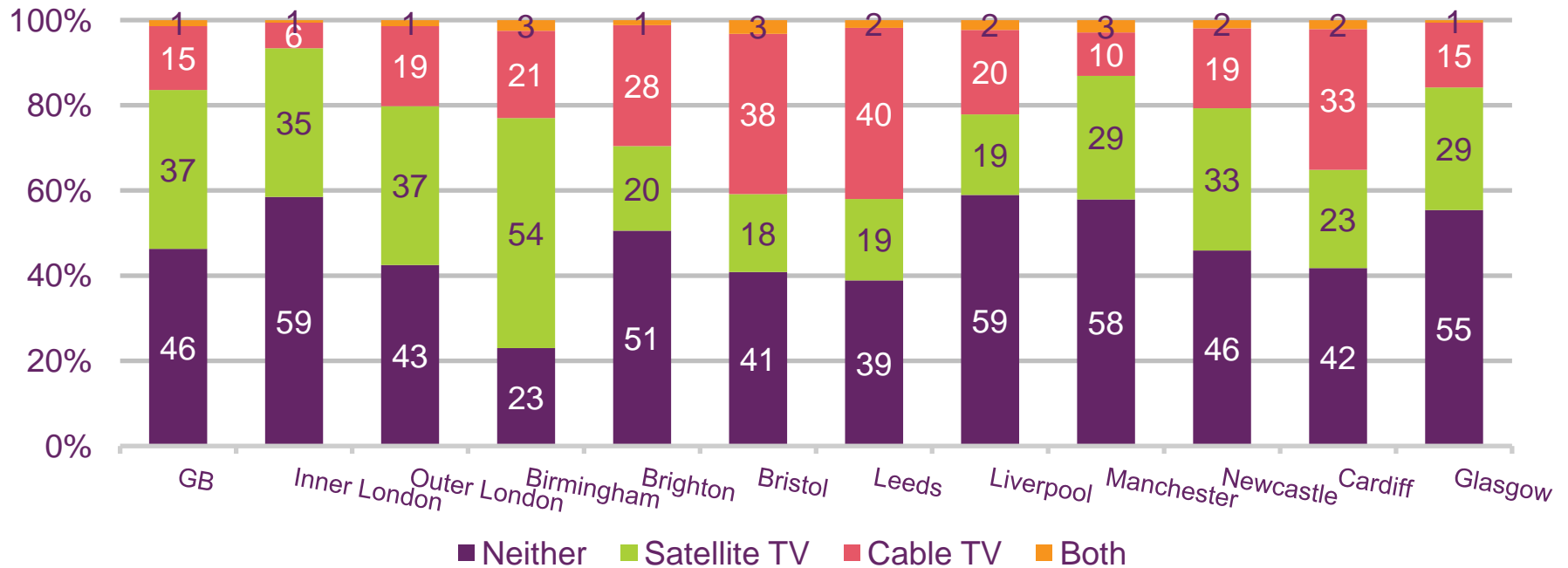
Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Kingston 496, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. Is there a mobile telephone in your household? Is there a web-enabled telephone in your household?

# Figure 1.28

## TV platform by city



Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Kingston 496, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. Does your household have satellite /cable TV?

## Figure 1.29

### City population and premises data

City	Population	Total premises	Business premises	Residential premises
Bangor	c.14,800	c.6000	c.500	c.5500

Source: Analysys Mason

## Figure 1.30

Map of area local to Bangor, highlighting city boundary



Source: Analysys Mason

## Figure 1.31

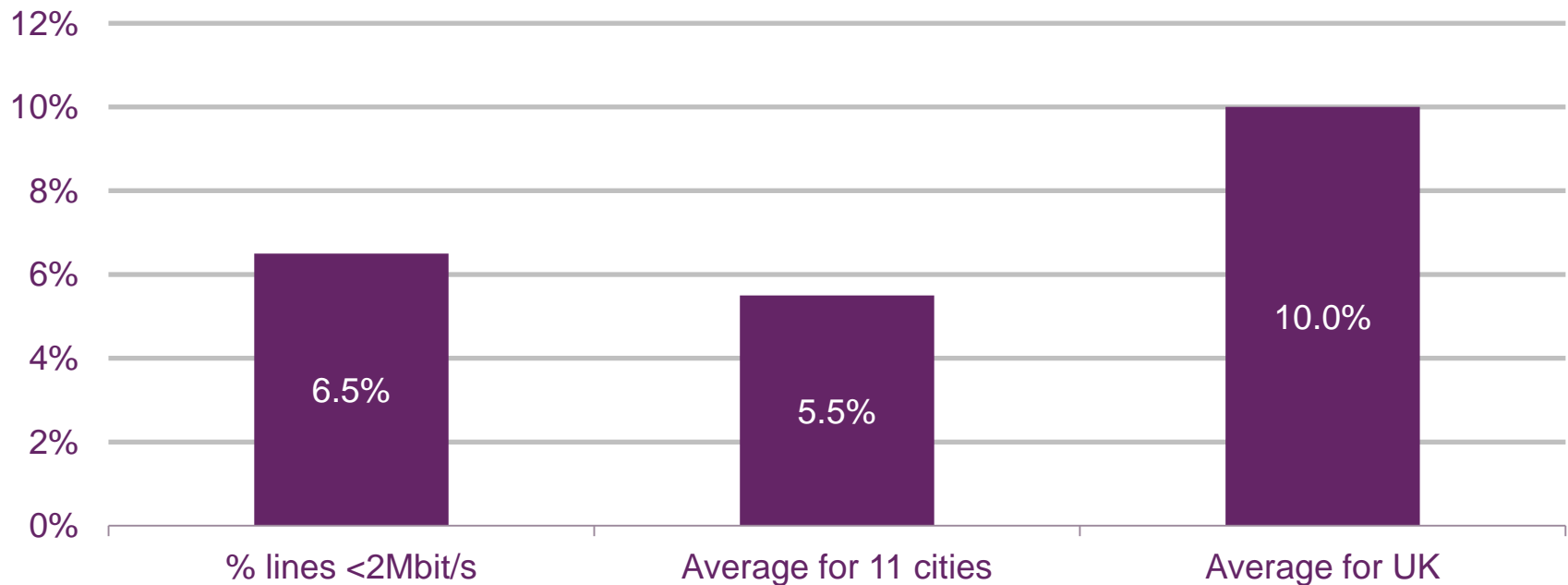
### Fixed network infrastructure premises passed availability

Operator	First-generation broadband	NGA (current)	NGA (future)
BT	100%	85%	85%
Virgin Media	0%	0%	0%
Total	100%	85%	85%

Source: Analysys Mason ,Ofcom Infrastructure Report 2012

## Figure 1.32

Percentage of lines that have a speed less than 2Mbit/s, and relative positioning



Source: Analysys Mason, Ofcom Infrastructure Report 2012



# Figure 1.33

## Key city hotspots data

City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
21	14.1	6.2	+129%

Source: Analysys Mason

## Figure 1.34

### 3G mobile coverage in city

% of premises with 3G signal from 4 operators (city benchmark)	% of premises with 3G signal from 3 operators (city benchmark)	% of premises with 3G signal from 4 operators (11 city average)	% of premises with 3G signal from 4 operators (UK average)	Percentage difference from 11 city average
76%	22.2%	95.7%	77.3%	-19.7%

Source: Analysys Mason ,Ofcom Infrastructure Report 2012

## Figure 1.35

### Key city exchange data

Ofcom classification	% of total exchanges	% of premises passed
3	0%	0%
2	100%	100%
1	0%	0%

Source: Analysys Mason

## Figure 1.36

Average maximum modem synch. speed compared to other cities

Excluding SFBB lines			Including SFBB lines			
Average maximum speed (Mbit/s)	City average (Mbit/s)	% difference	Average maximum speed (Mbit/s)	City average (Mbit/s)	UK average (Mbit/s)	% difference
15.9	14.1	+13%	15.9	29.9	12.7	-47%

Source: Analysys Mason ,Ofcom Infrastructure Report 2012