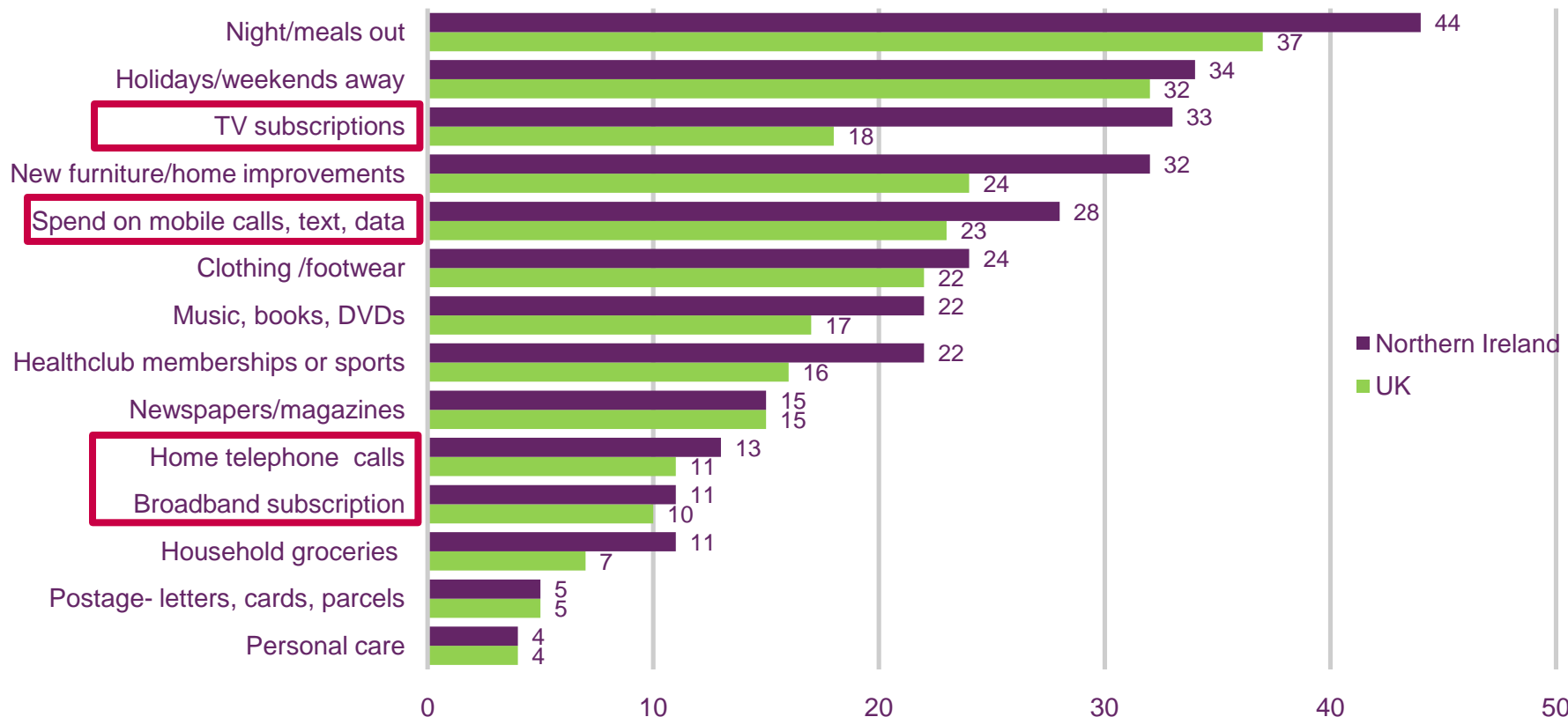


CMR Northern Ireland chart pack 2012

The market in context

Fig 1.2: Items and services where consumers are most likely to cut back their spending

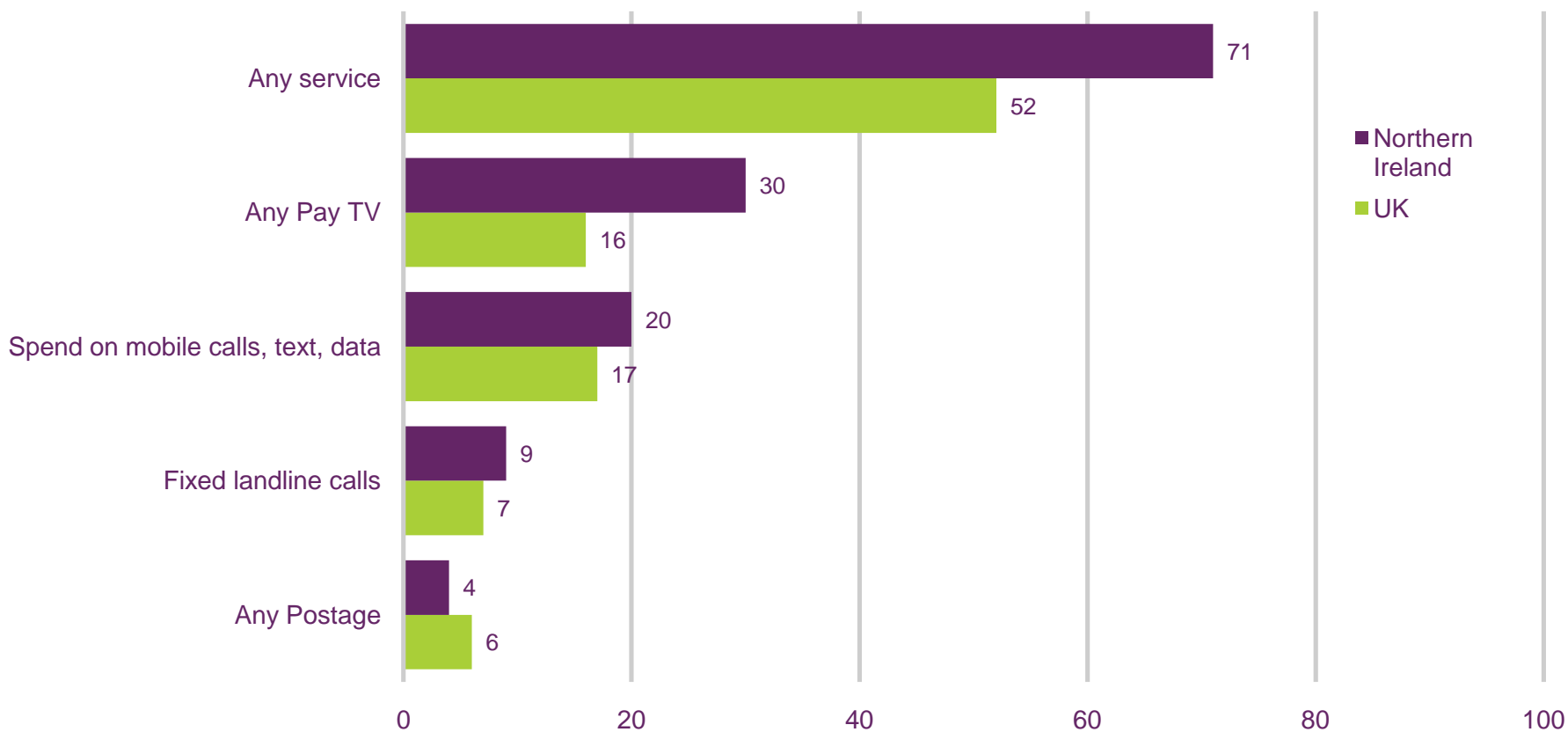


Q7/8 combined: If you were forced to cut back spending , which of the following items would you be MOST likely to spend less on? (multimode)

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)

Fig 1.3: SINGLE most likely 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

Fig 1.4: Services consumers are MORE to shop around for than a year ago



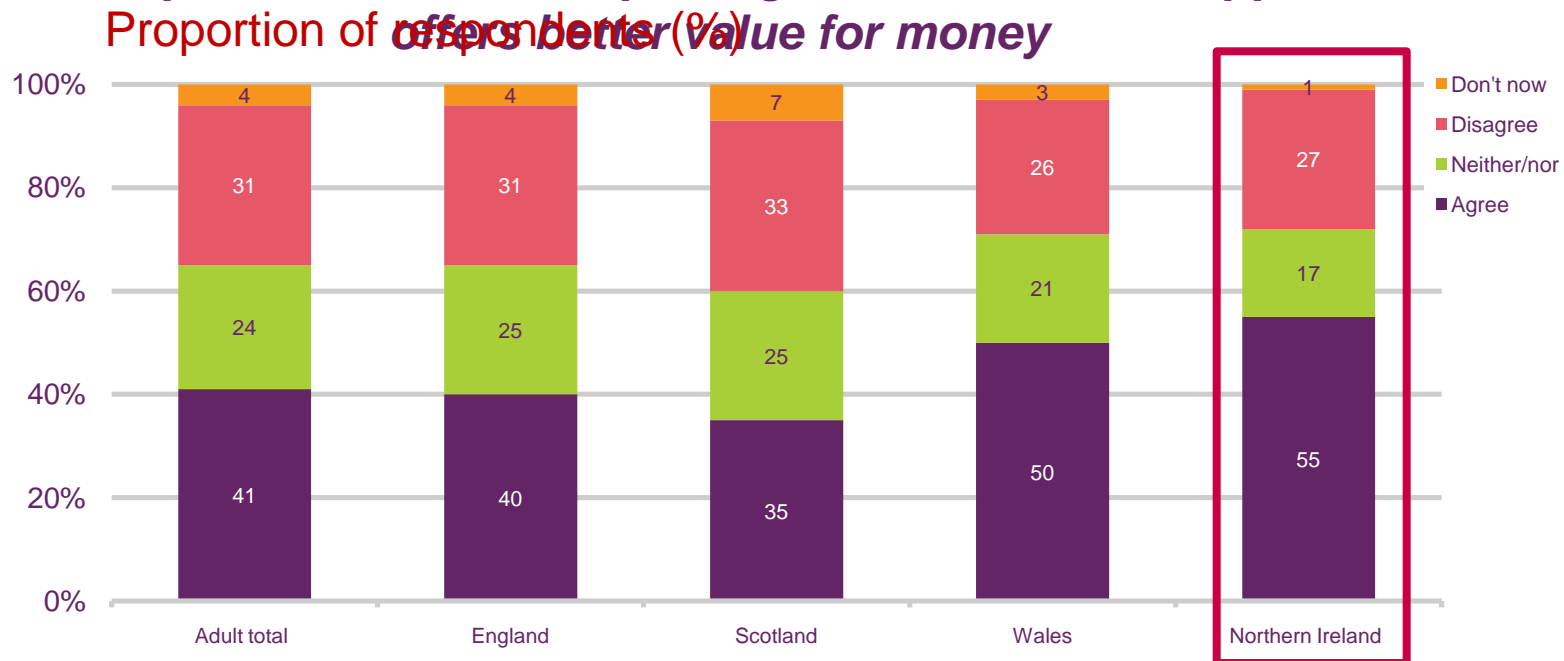
Q12: And which of the following are you MORE LIKELY to shop around for than you were 12 months ago? (Multi choice)

Source: Ofcom Attitudes toward spending research, 2012

Base: All UK adults aged 16+ n = 2124

Fig 1.5 Consumers agreement/disagreement that they are more likely to take communications 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

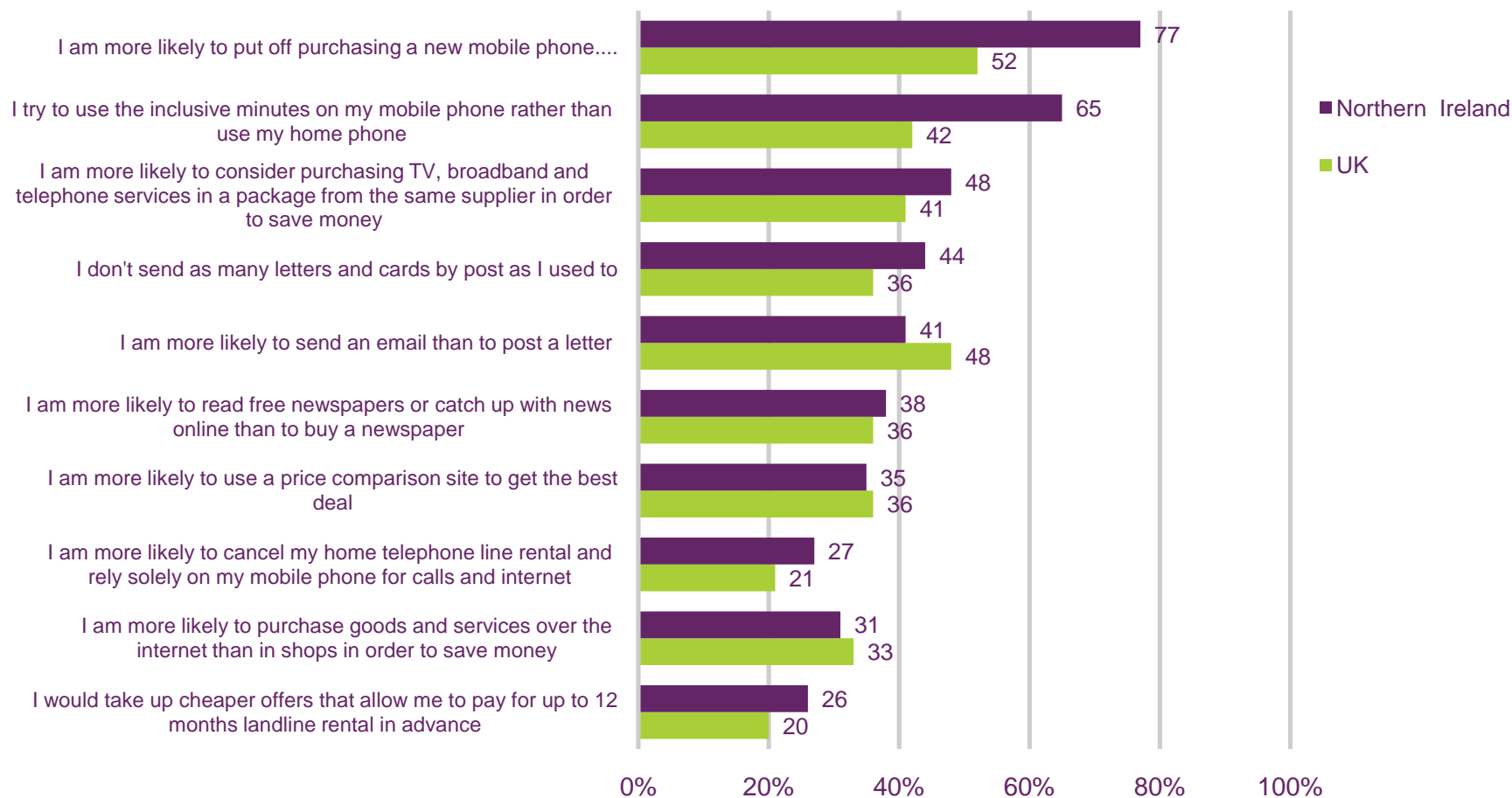


Source: Ofcom Attitudes to spending omnibus research, 2012

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)

Fig 1.6: Northern Ireland consumers' attitudes to spending 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

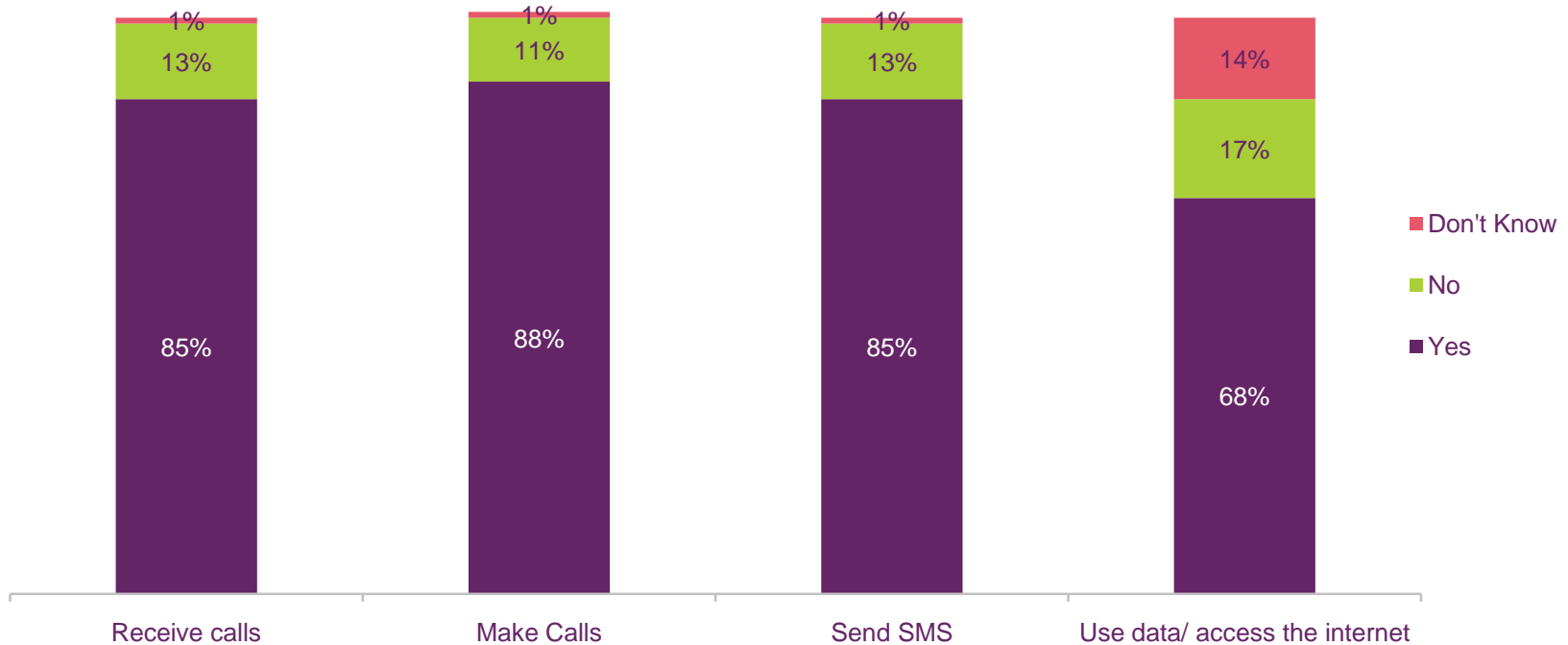
Base: Adults in Northern Ireland aged 16+ n = 117

1.7 Awareness of inadvertent roaming among mobile users in Northern Ireland



Some mobile customers in the border areas are aware of the problem, with awareness lowest around the use of data.

Before today were you aware that if your mobile picks up a Republic of Ireland signal while you are still in Northern Ireland you may have to pay to...



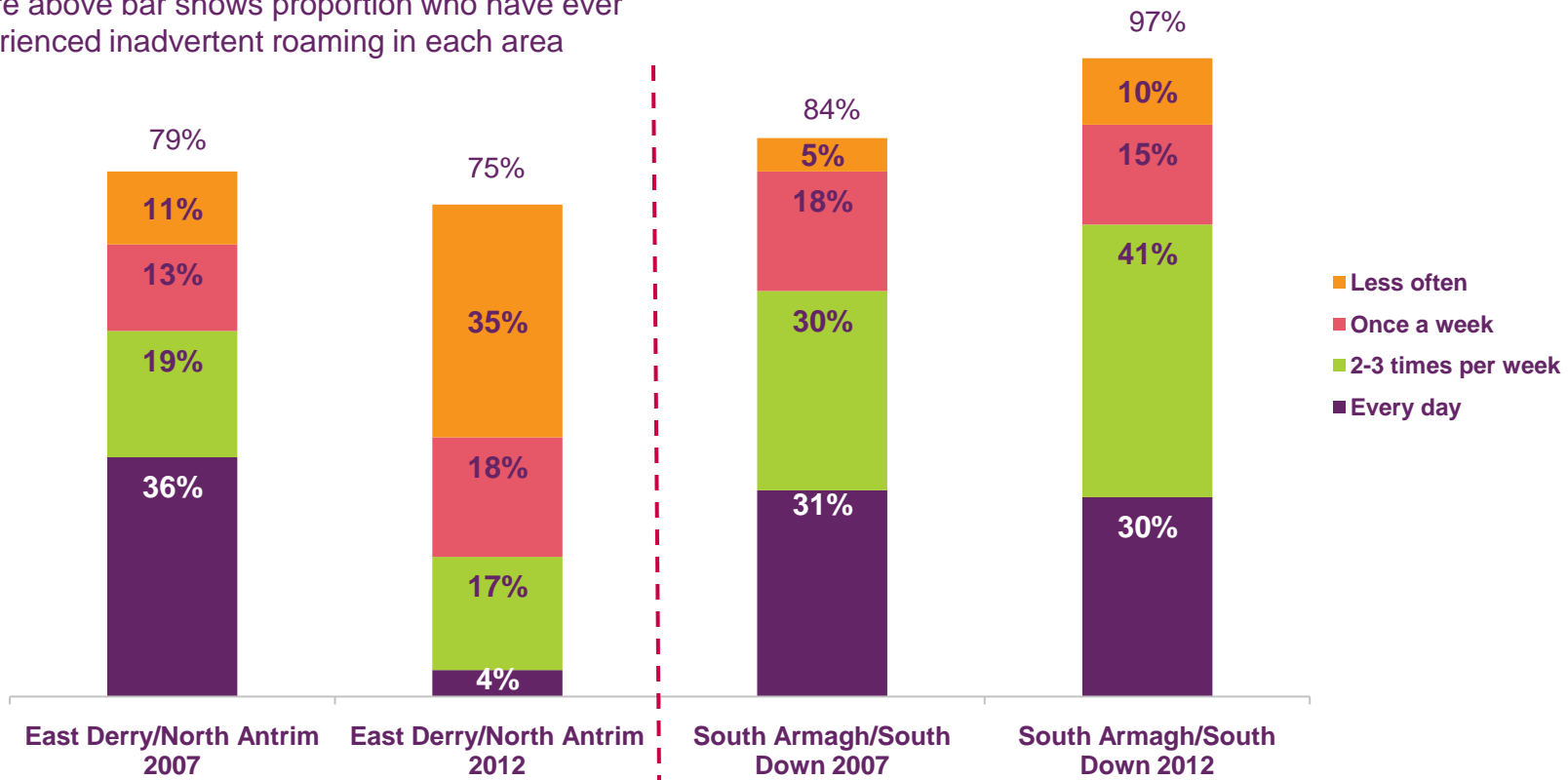
QA4/ QA5/ Q6/ QA7 - Before today were you aware that if your mobile handset picks up a Republic of Ireland signal while you are still in Northern Ireland you may have to pay to receive calls? / And were you aware that you may have to pay more than your normal rate to make calls/ send text messages/ use data/access to the internet if your mobile handset picks up a Republic of Ireland signal while you are still in Northern Ireland?

Base: All respondents: 412

1.8 Frequency of inadvertent roaming

...and the majority claim this happens once a week or more

Figure above bar shows proportion who have ever experienced inadvertent roaming in each area



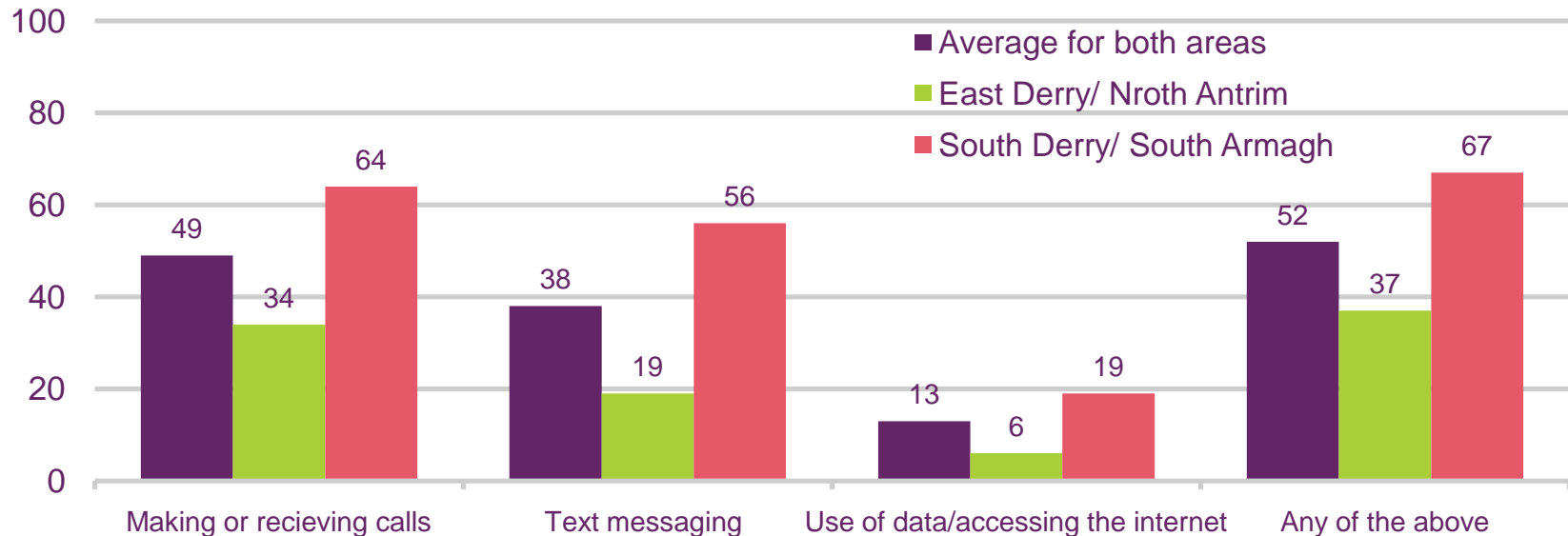
QB2: How often does this occur?

Base: All Respondents: 412, Area 1: 202, Area 5: 210

1.9 Percentage of consumers who incur extra charges because of problem

Half of mobile customers in the border areas say they have incurred extra charges for making or receiving phone calls

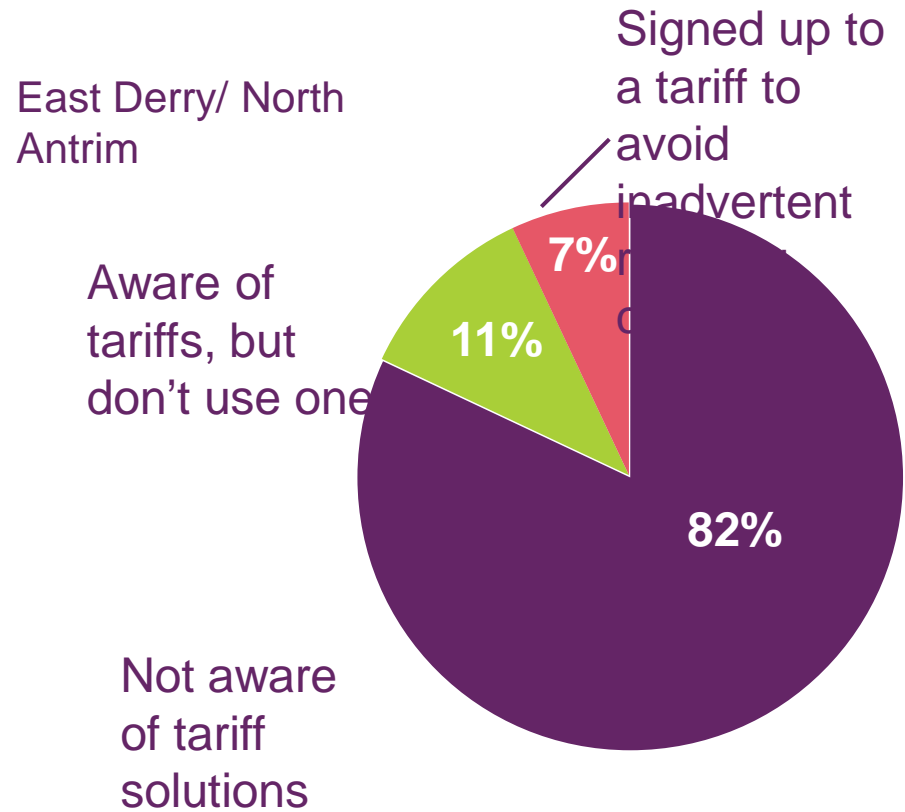
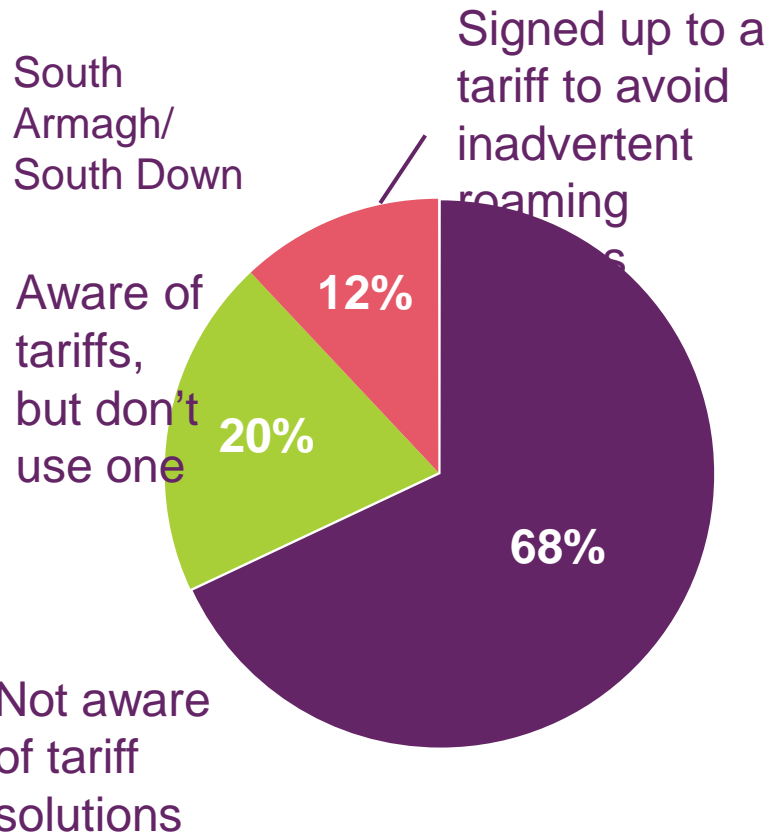
And the problem appears to occur most frequently in Area 5 (South Armagh/ South Down)



QA8: Have you ever to your knowledge had extra costs on your mobile phone bill (or credit deducted from your account if you are on a pay as you go tariff) that relate to your mobile phone picking up a Republic of Ireland tariff when you are in Northern Ireland for any of the following?

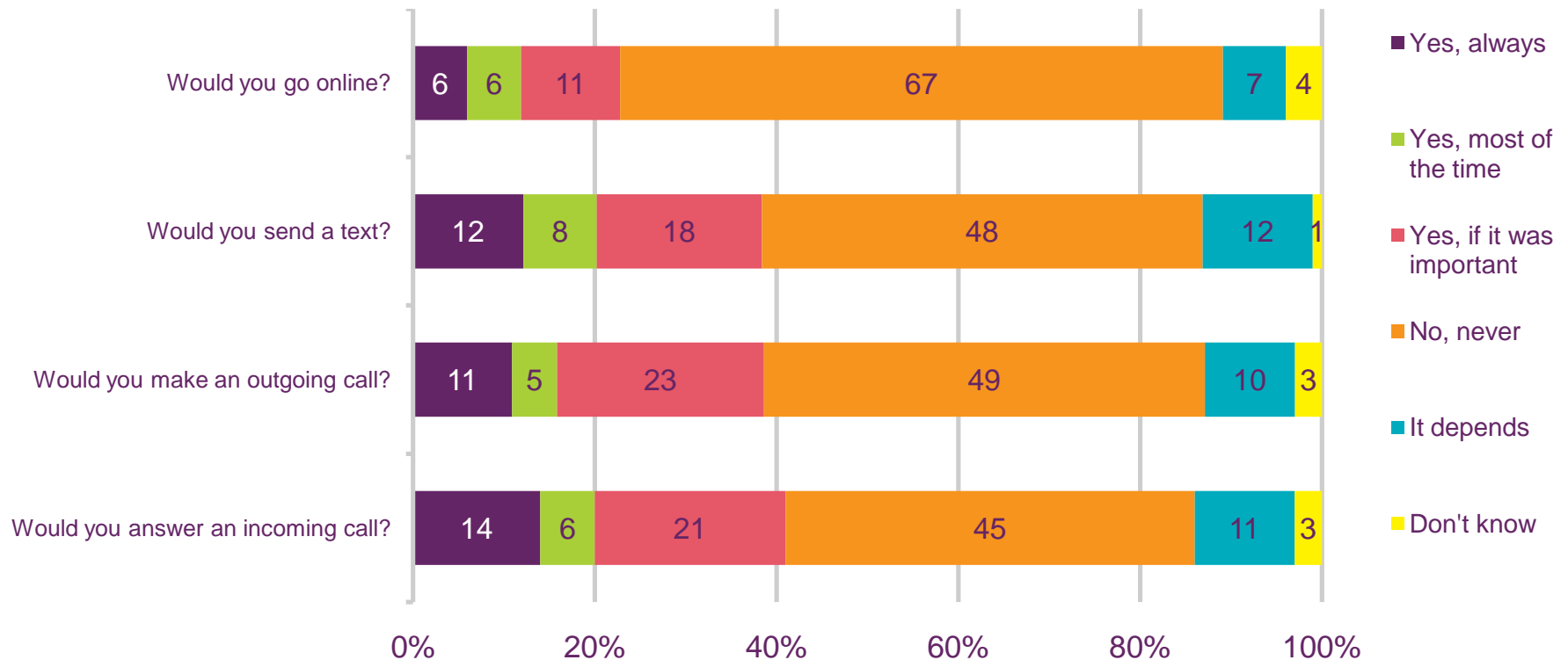
Base: All respondents: 412 , Area 1: 202, Area 5: 210

1.10 Awareness of tariff solutions to deal with inadvertent roaming



QA9: Are you aware of any special tariffs, price plans or 'bolt ons' available from your network provider to deal with the problem?
 QA10: Do you currently use one of these special tariffs, price plans or bolt ons? (ask if yes to QA9)
 Base: All Respondents : 412

1.11 The impact of inadvertent roaming on phone usage

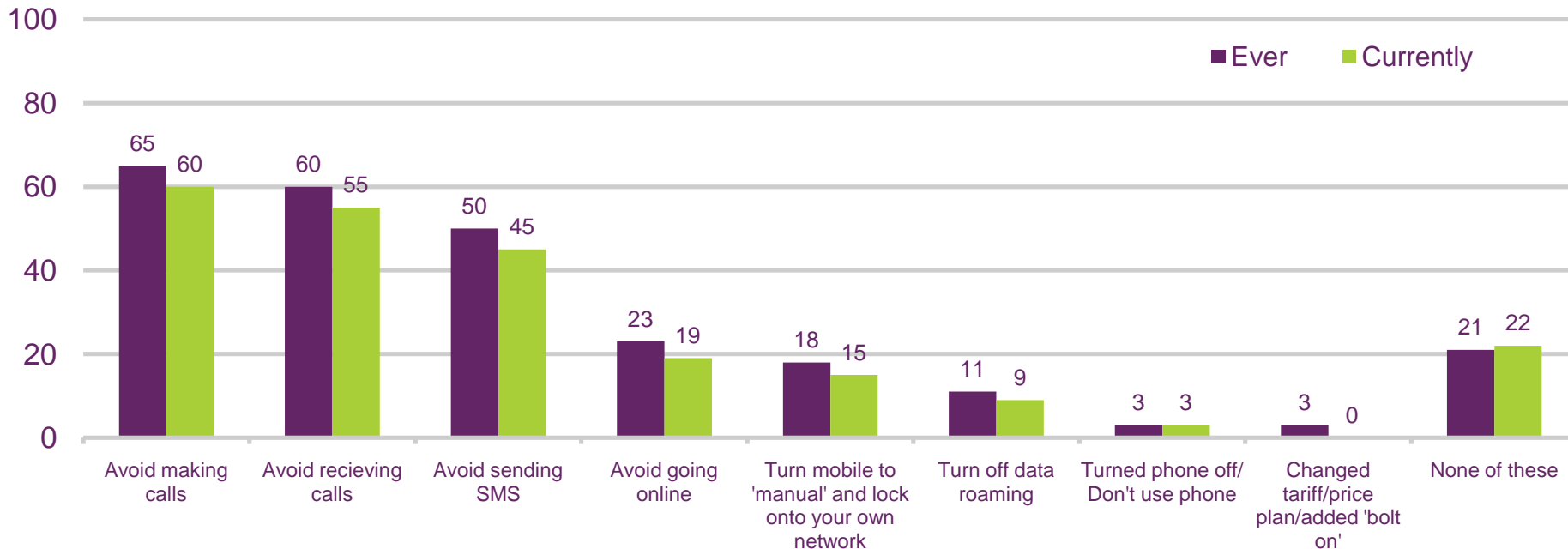


QB10: If you know you are on a REPUBLIC OF IRELAND network whilst in Northern Ireland and there is an incoming call, would you answer it?
 QB11: If you know you are on a REPUBLIC OF IRELAND network whilst in Northern Ireland and you wanted to make an outgoing call/ to send a text message/ wanted to use your mobile phone to access the internet would you make/ send it/ go online?
 Base: Respondents who have experienced IR: 355

1.12 Methods used to avoid extra charges from inadvertent roaming

18% of those who have ever experienced inadvertent roaming have locked onto their network provider's signal

% respondents

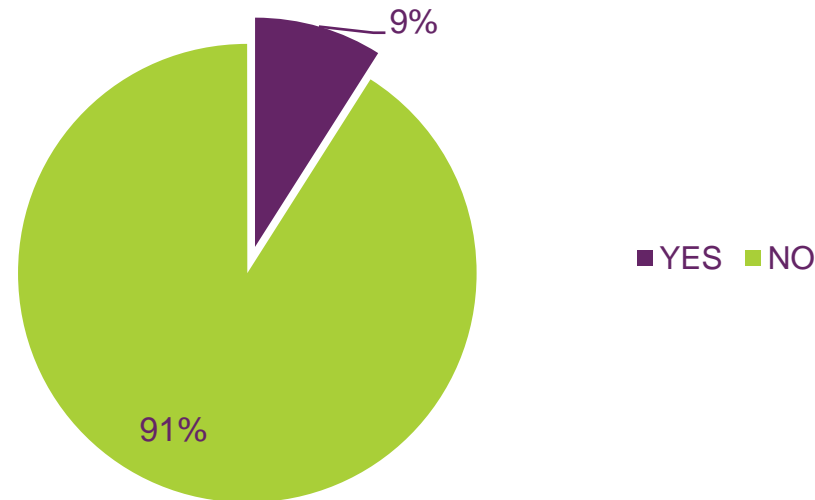


QB8: Have you **ever** done any of the following things to avoid paying extra charges when you pick up a Republic of Ireland network?

QB9: And which of these things do you **currently** do to avoid paying extra charges when you pick up a Republic of Ireland network?

Base: Respondents who have experienced IR: 355

1.13 Proportion of respondents who have experienced inadvertent roaming and made a complaint



QB3: Have you ever complained to anyone about this?
Base: Respondents who have experienced IR: 355