

Amateur Radio Licensing Consultation Research

REPORT

Research Study Conducted for Ofcom

MORI

October 2005

Contents

Executive Summary.....	1
1. Introduction.....	3
1.1 Background and Objectives	3
1.2 Research Methodology	4
1.3 The Questionnaire and Other Survey Materials.....	6
1.4 Respondents under the Age of 16 Years.....	7
1.5 Information and Helpline	7
1.6 Pilot of the Survey Materials	7
1.7 Response Rate	8
1.8 Data Analysis.....	9
1.9 Interpretation of Data.....	9
2. Key Findings	10
3. About the Licence Holder	16
3.1 Profile of licence holders.....	16
3.2 Length of time as a licence holder	17
3.3 Frequency of use of amateur radio	17
3.4 Use of the Internet.....	18
4. Ofcom Consultation	19
4.1 Prior knowledge	19
4.2 Source of awareness of the Ofcom consultation	20
4.3 Opinions of current licensing arrangement	24
4.4 Opinions of the best way forward	27
4.5 Length of renewal period	29
4.6 Life-time licences	30
4.7 Electronic licences.....	31
4.8 Cost of postal licence.....	33
4.9 Cost of Notice of Variation.....	35
4.10 Likelihood of response to the Consultation.....	36
4.11 Other comments.....	38
5. Membership of Amateur Radio Societies.....	40

5.1 Society and club membership.....	40
5.2 Next steps.....	46
Appendices	47
Publication of the Data.....	48
Statistical Reliability.....	49
Listings for Question 7.....	50
Details of codes for Question 22.....	52
Questionnaire	55
Letter to Respondent.....	59
Information Sheet	60

Executive Summary

Opinions on future licensing arrangements

- When asked which of four options they consider to be the best way forward for amateur radio licensing, 45% of licensees opt for life-time licensing. Just over a quarter would prefer to keep the existing licensing arrangement and the same proportion would prefer to replace the existing arrangement with a longer renewal period (26% in each case).
- Only 1% of licensees think that the licence should be abolished altogether and fewer than 1% think the current licence should be replaced with something else.
- Members of the Radio Society of Great Britain (RSGB) are equally likely to opt for a longer renewal period as they are to prefer life-time licences (33% in each case). Marginally fewer (31%) opt for retaining the existing licensing arrangement.
- Those who are members of clubs other than the RSGB and those who do not belong to any amateur radio club or society are more likely to opt for a life-time licence (49% and 54% respectively) than retaining the existing arrangement (25% and 21% respectively) or opt for a longer licence renewal period (22% and 21% respectively).
- Six in 10 of those who would like a longer renewal period would prefer a five year, just less than a quarter (23%) would prefer a three year and 10% a 10 year renewal period.

Opinions on current licensing arrangements

- When asked specifically their opinion of the current licensing arrangement, two thirds of licensees feel it is “about right” on a five point scale ranging from “too strict” to “too relaxed”.
- Those who think the best way forward, from the four possible options, is to retain the existing arrangement are more likely than those who prefer life-time licensing or a longer renewal period to think the current arrangement is “too relaxed”. Those who prefer life-time licensing are more likely to think the existing arrangement is “too strict”.

Opinions on life-time licences

- When specifically asked whether they supported or opposed Ofcom issuing “licences that remain valid for the life of the licensee”, 58% claim to support this move.
- This level of support rises to 93% among those who, from the four possible options for the best way forward, opted for the life-time licence. However, the levels of support for life-time licensing amongst those who opted to retain the existing arrangement or for a longer renewal period are lower at 27% and 26% respectively.

Opinions on electronic licences

- When specifically asked whether they supported or opposed Ofcom’s possible “move to an electronic (online web based) licensing process” just over two in five (41%) claim to support the move.
- This level of support rises to over half (54%) among those who, from the four options for the best way forward for licensing, opted for the life-time licence. This falls to 19% among those who opted to retain the existing licensing arrangements.
- The majority (86%) of licence holders use the Internet and 43% only use it at home.
- One in eight (13%) licence holders does not use the Internet. Among those in this sub-sample, almost two thirds (64%) oppose the move to electronic licensing.

Willingness to pay to obtain a licence by post

- Costs given as “reasonable” for the option to renew a licence by post range from free of charge to £50. The average cost is £11.67.
- Amongst those aged under 21 or 65 and over the average “reasonable” costs given are lower: £8.32 and £11.04 respectively. Those who do not use the Internet gave a lower average “reasonable” cost (£10.54) than those who do (£11.83).

Willingness to pay for a Notice of Variation

- Costs given as “reasonable” for obtaining a Notice of Variation range from free of charge to £99, with an average cost of £10.13. Those aged under 21 gave the lowest average “reasonable” cost (£6.78) and those aged 45 – 64 the highest (£10.80).

1. Introduction

This report presents the findings of a survey conducted by MORI on behalf of Ofcom.

1.1 Background and Objectives

In December 2003, Ofcom took on the responsibility for managing the radio spectrum in the UK from the Radiocommunications Agency. As part of this remit, Ofcom is currently undertaking a full review of the amateur radio licence regime and is looking at possible ways forward.

As part of this review, Ofcom is proposing the following:

- To issue amateur radio licences which are valid for life, thereby avoiding the need for renewals;
- To provide an online, web-based, self-service licensing service as an alternative to the postal service;
- To issue electronic licences (probably PDF documents) to users of the online, web-based, self-service licensing service free of charge;
- Ofcom, or its agents, would continue to provide a postal service for applicants who do not have access to the Internet or who prefer not to use the Internet. The use of this service would not be free of charge since a fee would be applied to cover direct costs.

This review may lead to changes to the regime and it is thus important to take into consideration the views and opinions of licence holders themselves.

As a result, MORI was commissioned to undertake a survey to assess the views and opinions of a carefully selected sample of licence holders. Specifically, the objectives of the research were as follows:

- To undertake an independent and authoritative research study, the results of which will inform Ofcom's policy decision and complement the findings of the formal consultation process;
- Select a representative sample of amateur radio licensees within each of the three licence types (Full, Intermediate and Foundation) and identify their views on subjects key to Ofcom's understanding of this population in preparation for the review;

- Place the consultation responses in the overall context of the general population of amateur radio licensees;
- Raise Ofcom's understanding of the type of people who hold an amateur radio licence and to consider specifically membership of societies, demand for advanced licences and what will be their future requirements.

This report gives a written commentary of the findings of the research, accompanied by charts showing some of the findings in graphic form.

1.2 Research Methodology

One of the foremost decisions to be made was whether the survey was to be interviewer administered over the telephone or completed by the amateur radio licence holder via a paper-based self-completion questionnaire. Given the budgetary constraints and, after discussing this matter further with Ofcom, both parties felt that a self-completion format was appropriate provided it was carefully designed and the resultant sample weighted to the true population proportions at the analysis stage.

A total of 4,500 amateur radio licence holders were selected to the sample and sent a copy of the questionnaire and accompanying materials. Below, we outline how the sample was selected and the survey carried out.

There are three main types of amateur radio licence holders, these being:

- Full
- Intermediate
- Foundation

The majority (83.8%) of licence holders have a Full licence. In order to ensure that there were a sufficient number of Intermediate and Foundation licence holders in the final samples to enable the views of the smaller groups to be understood, the numbers selected in these latter two groups were boosted. Thus a disproportionate number of Foundation and Intermediate licence holders were selected to the initial sample and, at the analysis stage, weighted back to their true population proportions to ensure that the final sample was representative of the overall profile of licence holders. In this way we could ensure that we had a sufficiently robust sample of those in each of the three licence groups to provide meaningful analysis of the results.

The table below shows details of the profile of the un-weighted sample and the weighting applied to correct for this boost.

TOTAL	Un-weighted sample	Weighted sample
	1,572	1,572
	% (n)	% (n)
Licence Type		
Foundation	17.3 (272)	11.3 (178)
Intermediate	18.2 (286)	4.9 (76)
Full	64.5 (1,014)	83.8 (1,318)
Source: MORI		

Ofcom, in close liaison with MORI a) ordered the sample frame of licensees and b) subsequently selected the samples. The entire sample frame of all licence holders was divided into three categories – one for each of the three licence holder types, these being Full, Intermediate and Foundation licence. Using the SPSS package, a random sample of licence holders was then selected within each of the three licence types to the required proportions.

Completed questionnaires were received from licensees across the whole of the UK (Q19). The table below shows details of the regional distribution before and after weighting.

TOTAL	Un-weighted sample	Weighted sample
	1,572	1,572
	% (n)	% (n)
Region		
London / South East / East of England	32 (496)	32 (511)
North East England / Yorkshire and Humberside	11 (180)	11 (179)
North West England / Isle of Man	12 (192)	12 (183)
Midlands	16 (259)	17 (261)
South West England / Channel Islands	12 (183)	12 (183)
Wales	6 (99)	6 (102)
Scotland	6 (94)	5 (84)
Northern Ireland	3 (53)	3 (54)
Don't know / not stated	1 (16)	1 (16)
Source: MORI		

1.3 The Questionnaire and Other Survey Materials

Each potential respondent asked to take part in this survey received the following:

- An introductory letter outlining the purpose of the survey and asking for their cooperation (appended);
- A self-completion questionnaire (appended);
- An Information Sheet providing more detail on each of the four possible options for the amateur radio licence (appended);
- An addressed pre-paid return envelope.

On commission and in close collaboration with Ofcom, MORI produced the first draft of the questionnaire and introductory letter. Given the technical nature of the Information Sheet, Ofcom produced the first draft of this document. Each of the three documents went through a rigorous assessment by both MORI and members of the Ofcom team and numerous drafts were produced until both parties were happy with the content and design.

The questionnaire contained a total of 28 question units, within 22 questions – two of which were open-ended where respondents were asked to provide a verbatim response. Responses to all of the remaining questions were pre-coded (where a number of alternative responses were provided) or the respondent had to fill in a monetary amount or number.

The first open-ended question (Q7) was to be completed by licence holders who believed that the current licensing arrangement should be ‘abolished altogether’ or be ‘replaced by something else’. As there were only 17 respondents who fell into these two categories, it was decided to provide a full listing of their responses and verbatim comments are appended to this document.

The responses to Q22 were listed and an appropriate code frame produced based on common answers. Each response was then allocated an appropriate code(s) and the data analysed and included in the tabular results.

Licensees receiving a questionnaire were asked for their kind cooperation in completing and returning the questionnaire in the envelope provided.

The questionnaires and accompanying materials were mailed out to respondents from the 26th of May and questionnaires were completed between 27th May and 20th June 2005.

1.4 Respondents under the Age of 16 Years

As a number of those selected to the sample were children under the age of 16 years, in accordance with the Market Research Society's Code of Conduct, we asked for consent from their parent or guardian. A separate self-completion authorisation form was provided (and can be found at the bottom of the introductory letter). This required the parent or guardian to complete and return the declaration form with the questionnaire.

1.5 Information and Helpline

Dedicated telephone lines (020 7981 3040 / 020 7981 3774), text phone (020 7981 3043) were set up for any respondent who may have had a question or query relating to the survey, survey materials or the consultation in general. Respondents were also given the address of the relevant page of Ofcom's website relating to the consultation (www.ofcom.org.uk/consult/condocs), which included an email address for queries about the survey. Questions on the consultation and technical questions relating to the operational side of the licence were directed to Ofcom and research methodological questions to MORI.

1.6 Pilot of the Survey Materials

MORI carried out a pilot study of the questionnaire and accompanying Information Sheet to test:

- The level of understanding of the questionnaire/Information Sheet;
- Interpretation of questions, terms and 'jargon' used;
- Ease of understanding questions/vocabulary used;
- Ease of answering the questions;
- Whether the questions covered all of the options/codes required.

In total, the pilot was carried out among 15 amateur radio licence holders. Each pilot respondent was sent a covering letter, questionnaire, two alternative versions of the Information Sheet (one where the options were listed out underneath each other and the other where the options appeared next to each other in a grid format – the preferred option and the format used in the main stage of the study) and a separate Pilot Comments Sheet on which they could highlight any of their observations. Where found necessary, this was followed-up with a telephone call to go through a number of the points and any problems encountered.

On completion of the pilot, the MORI study team 'fine tuned' the materials as necessary in close collaboration with Ofcom. This included clarification of some of the scales and language used on the questionnaire. As the majority of

respondents to the pilot found the grid format information sheet easier to understand, this version of the sheet was used in the main study.

1.7 Response Rate

Of the 4,500 questionnaires sent out, a total of 1,572 were completed and returned by the cut off date of 20th June 2005 - an overall response rate of 35%. Typically, in a postal survey such as this, we expect to achieve an initial response rate of around 15%, which can then be increased by sending out a reminder to those who do not return a completed questionnaire by the cut off date. We originally intended to send out a reminder letter, questionnaire and information sheet to all those who had not returned a completed questionnaire by the cut off date. However, in the event this was not necessary, as the number of licensees who responded to the initial mail out was sufficient to provide a robust sample for analysis purposes.

We believe the response rate to be high for such a survey and believe that this may be due to one or more of the following aspects;

- **Subject which is of interest to respondents** – as the study was being carried out among amateur radio enthusiasts, many of whom would be interested in the subject area and also the proposed changes. This in itself may have prompted completion as they were able to take an active part in relaying their views on this subject area;
- **The MORI name** – people are generally more likely to be receptive to an approach from an organisation they have heard of and trust. We often find that our reputation and profile helps us to achieve higher response rates – essential for a self-completion survey such as this;
- **Well laid out and aesthetically pleasing questionnaire, letter of introduction and information sheet** – the questionnaire and other survey materials were produced to the highest quality. The questionnaire was produced using the desktop publishing package QuarkExpress to ensure that it looked inviting to complete and clear to understand. The Information Sheet was also important and a key element in the respondent's understanding of what was proposed. After piloting, it was decided to show each of the four options side-by-side in a grid format. We worked very closely with Ofcom to develop all of the survey materials;
- **Short questionnaire** – one advantage of this survey is that it is short and to the point and a length that was far more likely to gain cooperation than a longer and more complicated questionnaire format;
- **Guaranteed anonymity** – this is key to the success of such a survey and both the questionnaire and introductory letter made this very clear.

1.8 Data Analysis

Completed questionnaires were posted back to MORI in London where MORI's data analysis company MDS (MORI Data Services) undertook the analysis.

1.9 Interpretation of Data

Where percentage figures in the tables do not add up to 100% this could be due to computer rounding, multiple response answers or the exclusion of "don't knows". When a value is less than 0.5 per cent it appears as *.

2. Key Findings

The Amateur Community

- Amateur radio is a predominantly male hobby (94% of licensees are male, 5% are female).
- Three quarters (78%) of licence holders are aged 45 or older, with 29% aged over 64.
- Almost a quarter (24%) of licensees have held their licence for between 11 and 20 years and almost half (46%) have held an amateur radio licence for more than 20 years.
- Six in ten licensees communicate using their amateur radio at least once a week. RSGB members tend to communicate more frequently than those who are members of other radio societies, who in turn communicate more frequently than those who are not members of any amateur radio club or society.
- The majority (86%) of licence holders use the Internet and 43% only use it at home.

The Consultation Process

- Prior to receiving the survey documents (introductory letter, questionnaire and information sheet) from MORI, over half of licensees (58%) had at least heard of the Ofcom consultation on Amateur Radio Licensing. One in twenty (5%) claim to have known “a great deal” about the consultation prior to receiving the questionnaire.
- Those who communicate more frequently using their amateur radio have a greater level of prior knowledge of the consultation than those who communicate less often.
- RSGB members tend to have a greater depth of prior knowledge of the consultation, with only 11% saying they had not heard of the consultation – compared with 24% of members of clubs other than the RSGB and 56% of licensees who are not members of any amateur radio club or society.
- The main sources of awareness of the consultation are from reading newsletters or mailings from an amateur radio club or society and reading about it in a hobby magazine or paper (cited by 47% and 39% respectively of those who were aware of the consultation prior to receiving the survey documents).

- RSGB members are most likely to have learned of the consultation from a newsletter or mailing (64%), followed by a hobby magazine or paper (46%), at a radio society meeting or from others in the club society (34%) or via an amateur radio website (22%). RSGB members are more likely than members of other clubs - or those who are not a member of a club or society - to have learned about the consultation from an amateur radio website (22% of RSGB members compared with 14% of members of other clubs and 15% of those who do not belong to a club).
- Members of other radio clubs or societies are more likely than RSGB members to have learned about the consultation at a club meeting or from others in their club (34% of RSGB members and 50% of other club or society members).
- Those who are not members of an amateur radio club or society are most likely to have learned of the consultation through reading about it in a hobby magazine / paper (35%), followed by hearing from another amateur radio user over the radio.
- Fourteen percent of those who were previously aware of the consultation had learned of the consultation from Ofcom, most of these (11%) from Ofcom's website and 4% through an email from Ofcom. The younger the licensee, the more likely they are to have heard of the consultation from Ofcom's website.

Opinions on Licensing Arrangements

Current Arrangement

- When asked specifically their opinion of the current licensing arrangement, two thirds of licensees feel it is "about right" on a five point scale ranging from "too strict" to "too relaxed".
- Those who think the best way forward, from the four possible options, is to retain the existing arrangement are more likely than those who prefer life-time licensing or a longer renewal period to think the current arrangement is "too relaxed". Those who prefer life-time licensing are more likely to think the existing arrangement is "too strict".

Opinions of the best way forward

- When asked which of four options they consider to be the best way forward for amateur radio licensing, 45% of licensees opt for life-time licensing. Just over a quarter would prefer to keep the existing licensing arrangement and the same proportion would prefer to replace the existing arrangement with a longer renewal period (26% in each case).

- Only 1% of licensees think that the licence should be abolished altogether and fewer than 1% think the current licence should be replaced with something else.
- Members of the Radio Society of Great Britain (RSGB) are equally likely to opt for a longer renewal period as they are to prefer life-time licences (33% in each case). Marginally fewer (31%) opt for retaining the existing licensing arrangement.
- Those who are members of clubs other than the RSGB and those who do not belong to any amateur radio club or society are more likely to opt for a life-time licence (49% and 54% respectively) than retaining the existing arrangement (25% and 21% respectively) or opting for a longer licence renewal period (22% and 21% respectively).
- Women are more likely than men to opt for life-time licensing (58% of women compared to 44% of men) whereas men are more likely than women to prefer to retain the existing arrangement (26% of men compared to 14% of women). Levels of opting for a longer renewal period are equal between men and women (26% of men and 25% of women).
- Six in 10 of those who would like a longer renewal period, would like a five year, just less than a quarter (23%) would like a three year and 10% a 10 year renewal period.

Life-time Licences

- When specifically asked whether they supported or opposed Ofcom issuing “licences that remain valid for the life of the licensee”, 58% claim to support this move.
- This level of support rises to 93% among those who, from the four possible options for the best way forward, opted for the life-time licence. However, the levels of support for life-time licensing amongst those who opted to retain the existing arrangement or for a longer renewal period are lower at 27% and 26% respectively.

Electronic Licences

- The majority (86%) of licence holders use the Internet and 43% use it at home only.
- When specifically asked whether they supported or opposed Ofcom’s possible “move to an electronic (online web based) licensing process” just over two in five (41%) claim to support the move.

- This level of support rises to over half (54%) among those who, from the four options for the best way forward for licensing, opted for the life-time licence. This falls to 19% among those who opted to retain the existing licensing arrangements.
- One in eight (13%) licence holders does not use the Internet. Among those in this sub-sample, almost two thirds (64%) oppose the move to electronic licensing.

Willingness to pay to obtain a licence by post

- Costs given as “reasonable” for the option to renew a licence by post range from free of charge to £50. The average cost of £11.67.
- Amongst those aged under 21 or 65 and over the average “reasonable” costs given are lower: £8.32 and £11.04 respectively. Those who do not use the Internet gave a lower average “reasonable” cost (£10.54) than those who do (£11.83).

Willingness to pay for a Notice of Variation

- Costs given as “reasonable” for obtaining a Notice of Variation range from free of charge to £99, with an average cost of £10.13. Those aged under 21 gave the lowest average “reasonable” cost (£6.78) and those aged 45 – 64 the highest (£10.80).

Likelihood of response to the consultation

- Involvement in this survey appears to have satisfied the desire to respond to the Ofcom consultation for many respondents. Prior to receiving the survey documents, over half of licensees (55%) had either already responded or intended to respond to Ofcom. At the end of the survey this had fallen by half, with just 27% either certain to or likely to respond to Ofcom.
- Those who chose the life-time option are less likely to say they will send in a separate response to Ofcom than those opting to retain the current option or to extend the renewal period.
- The less frequently a licensee communicates using amateur radio, the more likely they are to say they will not send a separate response to Ofcom. Thirty six percent of those who communicate at least once a week are certain to or likely to send a separate response, compared with just 11% of those who communicate less often than once every six months.

Other comments

- As part of the survey, MORI also sought un-prompted comments from licensees. The main points raised were that licensees do not want the licence system to be deregulated, or the licence abolished altogether, leading to what some respondents fear would be a “free for all”. These deregulation and licence exemption issues were raised by 11% of respondents. Some licensees said that the training and examination system must remain in place, while others simply commented that they are happy with the current licensing arrangement.
- When given the opportunity to make any other comments about the Ofcom consultation, 63% of licensees left this section of the questionnaire blank, indicating that the questionnaire had covered most aspects of the consultation that respondents wished to give their views on.

Membership of Clubs

- Over half (55%) of amateur radio licensees belong to one or more amateur radio society, club or organisation and a further third (33%) have belonged to one at some point but no longer do so. The remaining 11% have never been a member of one.
- The RSGB is the most popular amateur radio organisation, with 39% of licensees belonging to this society. This is followed by local clubs, to which 31% of licensees belong. Other national clubs to which 5% or more of amateur radio licensees belong are RAYNET (8%), GQRP (5%) and RAFARS (5%).
- There are several benefits of belonging to a society, club or organisation, each one being more or less important for the various different sub-groups of licensees.
- Access to training to increase their technical abilities is important for 68% of licensees, and most important for those in the younger age groups and licensees who hold a Foundation or Intermediate licence.
- Receiving a newsletter is important for 62% and most important for older licensees, those who communicate less frequently than once every six months and those who do not use the Internet. Receiving a newsletter is more important for RSGB members than for members of other organisations.
- Access to club equipment / facilities is important for just less than half of club members (47%). This is more important for those with Foundation or Intermediate licences and more frequent communicators.

- Opportunities to take part in competitions / contests / rallies are important for 45%, and of particular importance for those aged 21 - 44 years and more frequent communicators.

©MORI/25267

Caroline Callahan

3. About the Licence Holder

3.1 Profile of licence holders

This survey included holders of the main three types of amateur radio licence: Foundation, Intermediate and Full, of which at the time of the study there were 59,926 in the UK in total. The majority (84%) of licensees have a Full licence, 11% hold a Foundation licence and 5% an Intermediate licence.

The chart below shows the profile of the total population of licence holders, the profile of the sample prior to being weighted by licence type and the profile of the weighted sample. The table shows that weighting by licence type had only a small effect on the age and gender profiles of the final sample and that profile of the final sample is very close to that of the total population of licence holders.

	Population of licensees		Unweighted sample		Weighted Sample	
	No.	%	No.	%	No.	%
TOTAL	59,926	100	1,572	100	1,572	100
Gender						
Male	55,805	93	1447	92	1,480	94
Female	3,988	7	118	8	85	5
Age						
Under 21	2,489	4	89	6	56	4
21 - 44	12,605	21	344	22	286	18
45 - 64	29,031	48	722	46	762	48
65+	15,801	26	408	26	459	29
Licence type						
Full/Advanced	50,234	84	1,014	65	1,318	84
Foundation	6,783	11	272	17	178	11
Intermediate	2,909	5	286	18	76	5

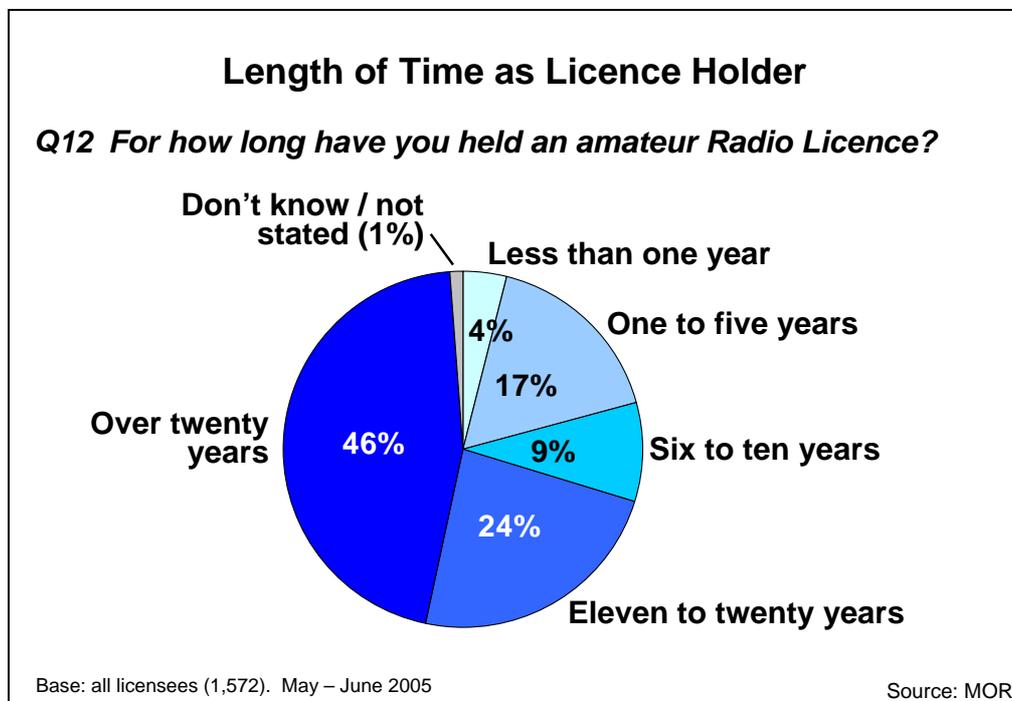
Source: MORI

Q17, Q16, Q10

Amateur radio is a predominantly male hobby and three quarters of licence holders are 45 or older.

3.2 Length of time as a licence holder

Almost a quarter (24%) of licensees have held their licence for between 11 and 20 years and almost a half (46%) have held an amateur radio licence for more than 20 years.



As may be expected, those aged 45 or older are more likely to hold a Full licence and those under 21 to hold a Foundation or Intermediate licence.

Q10 What type of licence do you personally hold?

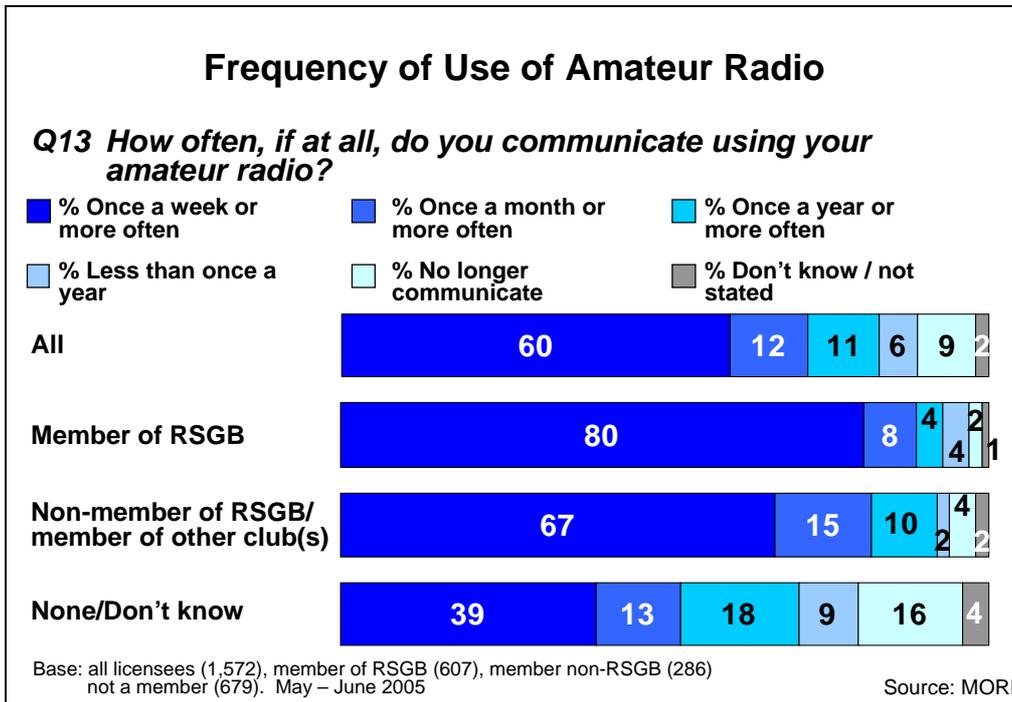
	Total	Age			
		Under 21	21 - 44	45 - 64	65+
Base: All licence holders	1,572	89	344	722	408
	%	%	%	%	%
Full/Advanced	84	30	70	88	92
Intermediate	5	13	9	4	3
Foundation	11	57	21	8	5

Source: MORI

3.3 Frequency of use of amateur radio

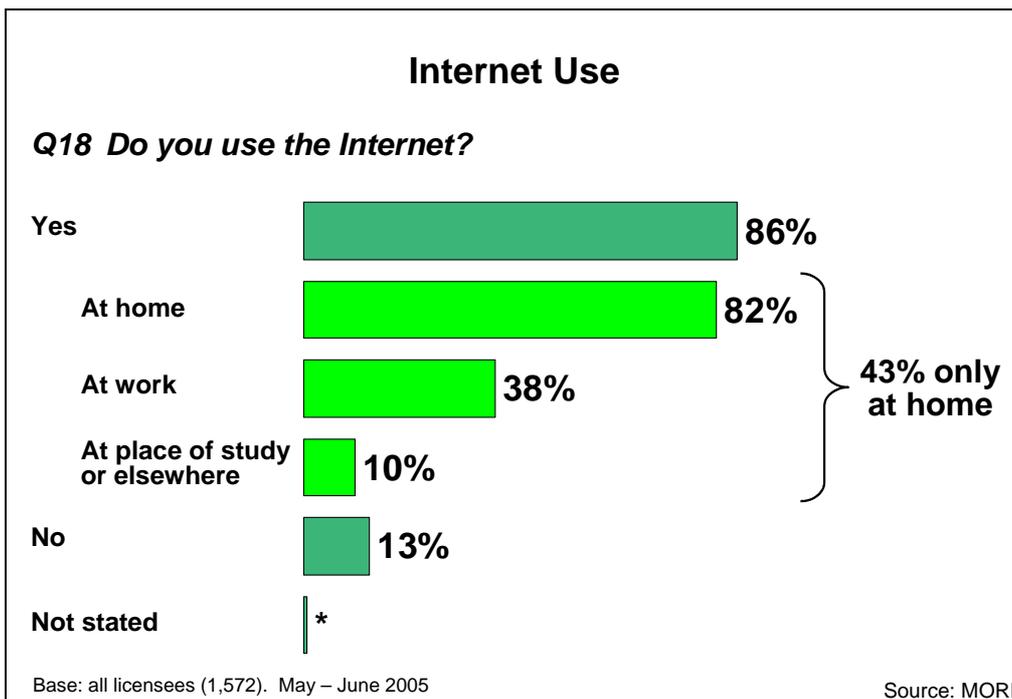
Six in ten licensees communicate using their radio at least once a week. RSGB members tend to communicate more frequently than those who are members of other clubs or societies, who in turn communicate more frequently than those who are **not** members of any club or society. The over 65s and those aged 21 to 44 are more frequent communicators than those from the other age groups.

Those holding a Foundation or Intermediate licence are more frequent communicators than those who hold a Full licence.



3.4 Use of the Internet

The majority (86%) use the Internet - 82% at home, 38% at their place of work and 10% at their place of study or elsewhere. Forty-three percent use the Internet solely at home. Over 65s are less likely than younger licensees to use the Internet.



4. Ofcom Consultation

4.1 Prior knowledge

The survey documents were posted to potential respondents using first class post on 26th May 2005, the day the consultation was launched by Ofcom, and therefore scheduled to arrive the day after the launch.

Prior to this launch, a number of national and local amateur radio clubs and societies informed their members of the consultation with some prompting them to respond.

The MORI survey tested claimed familiarity with the Ofcom Amateur Radio Consultation. Licensees' claimed level of knowledge of the consultation is fairly low with one third feeling they had "not heard of it at all" and a further one in ten (11%) "heard of it but knew nothing about".

The level of knowledge amongst those who say they know something about the consultation varies widely. One in twenty of all licensees (5%) state they "knew a great deal", 18% a "fair amount" and 24% "just a little".

The survey was carried out during a period where the consultation had been much discussed in the specialist media – particularly within the numerous club and society communications via the various websites, newsletters and other channels. It is therefore possible that licensees' views regarding the consultation and possible outcomes may have been influenced by the content and direction of the media and communications coverage.

Licensees' level of expressed familiarity with the consultation is considerably higher among those who are members of an amateur radio club or society than those who are **not** currently members - where only 7% feel they knew at least a fair amount. Indeed, two-fifths (41%) of RSGB members say they knew at least a "fair amount" – a level of familiarity far higher than among those who are members of clubs and societies other than RSGB.

It is also noticeable that claimed familiarity is higher among frequent radio communicators. One third of those who communicate via their radio once a week or more often knew at least a "fair amount" of the consultation, falling to just 7% among those who communicate less often than once every six months.

The survey results also reveal that those licensees who state a preference for a life-time licence (i.e. selected Option 2 at question 5) are less familiar with the consultation (where 18% knew at least a fair amount) than those stating a preference for retaining the existing arrangement (26%) or those who wish to have a longer renewal period (29%).

Q1 Which of the following best describes your level of knowledge of the Ofcom Amateur Radio Licensing Consultation before receiving this questionnaire and information sheet?

	Total	Club membership			Retain existing	Prefer	
		RSGB at all	Other, non-RSGB	None		Life-time	Longer renewal
Base: All licensees	1,572	607	286	679	417	684	417
	%	%	%	%	%	%	%
Knew a great deal about it	5	10	3	2	5	4	7
Knew a fair amount about it	18	31	20	5	21	14	22
Knew just a little about it	24	31	29	16	27	22	24
Heard of it, but knew nothing about it	11	8	16	13	12	11	12
Not heard of the consultation at all	33	11	24	56	27	41	26
Don't know/Not stated	9	10	8	9	8	8	8

Source: MORI

4.2 Source of awareness of the Ofcom consultation

Licensees were presented with a comprehensive list of possible ways in which they could have heard of the consultation **before** receiving the questionnaire and accompanying materials.

The two main sources of awareness emerge as a newsletter or mailing from an amateur radio club or society (47%) and hobby magazine or paper (39%). Just over three in ten (31%) have heard about it at an amateur radio club or society meeting or from others in the club or society and just over a fifth (21%) have heard about it over the amateur radio itself.

Full licence holders are more likely than Foundation/Intermediate holders to have read about the consultation in a newsletter or mailing from an amateur radio club or society or hobby magazine or paper. Foundation and Intermediate licence holders are more likely to have heard from their society or over the radio.

RSGB members are most likely to have learned of the consultation via a newsletter or mailing (64%), followed by a hobby magazine/paper (46%), a radio society (34%), via an amateur radio website (22%) and over the radio (19%). However members of other radio clubs are most likely to have heard via their

society (50%). Those who are not currently club or society members are most likely to be aware by reading about it in a hobby magazine or newspaper.

On average, licensees are made aware of the consultation via around two different sources of information (an average of 1.96 information sources). RSGB members have a slightly wider sphere of sources than those who are members of other clubs or societies (average mentions of 2.1 vs. 1.7).

The popularity of the RSGB website shows through in this survey with their members being far more likely than members of other clubs and societies to mention that they read about the consultation on an amateur radio website.

Q2 How did you learn of the consultation? Please tick all that apply

	Total	Licence type		Internet use		Club membership		
		Full/ other	Found/ Inter	Use	Do not use	RSGB at all	Other, non- RSGB	None
Base: All licensees who had heard of consultation before receiving the questionnaire	937	582	355	789	147	489	198	250
	%	%	%	%	%	%	%	%
Read about it in a newsletter or mailing from an amateur radio club or society	47	49	38	48	43	64	38	20
Read about it in a hobby magazine/paper	39	40	31	39	39	46	24	35
Heard about it at an amateur radio club or society meeting/from others in the club or society	31	28	44	30	33	34	50	10
Heard about it from another amateur radio user over the radio	21	19	27	20	25	19	22	23
Read about it on a website dedicated to amateur radio	19	19	16	22	*	22	14	15

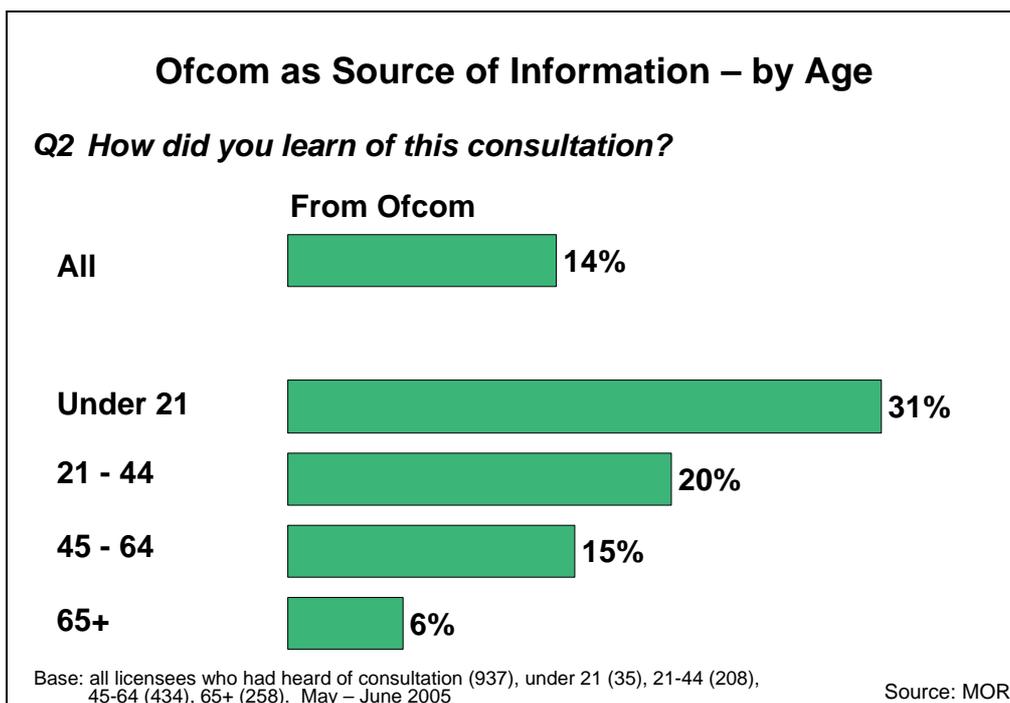
Q2 (continued) How did you learn of the consultation? Please tick all that apply

	Total	Licence type		Internet use		Club membership		
		Full/ other	Found/ Inter	Use	Do not use	RSGB at all	Other, non- RSGB	None
Base: All licensees who had heard of consultation before receiving the questionnaire	937	582	355	789	147	489	198	250
	%	%	%	%	%	%	%	%
From Ofcom	14	14	10	16	2	14	14	12
From Ofcom's website	11	12	9	13	1	12	11	10
Received an email notification from Ofcom	4	5	2	5	1	4	6	3
Read about it in the mainstream press	1	1	1	1	0	1	1	2
From somewhere else	5	5	7	6	2	3	5	10
Don't know/not stated	2	3	1	2	2	*	1	6

Source: MORI

As to be expected, those who use the Internet are more likely than those who do not to have learnt of the consultation via either Ofcom's or an amateur radio website.

The Ofcom website is a popular source among the younger age groups as shown in the chart below.



Those who prefer the introduction of a life-time licence (selecting Option 2) are found to be **no more** likely than those who select one of the other options to have heard about the consultation via Ofcom’s website, from an email from Ofcom or via an amateur radio website.

4.3 Opinions of current licensing arrangement

Two thirds of licensees feel that the current licensing arrangement, whereby licences are renewed annually at a cost of £15 for those aged 21-74, free for under 21s and 75+s, is “about right”, on a five point scale ranging from “too strict” to “too relaxed”.

There is some degree of feeling that the current arrangement is more relaxed than it ought to be, with a fifth thinking this overall.

The following comment illustrates the depth of feeling some licensees hold about the current licensing arrangement:

“There should be no relaxation in the examination requirements to obtain an amateur licence”

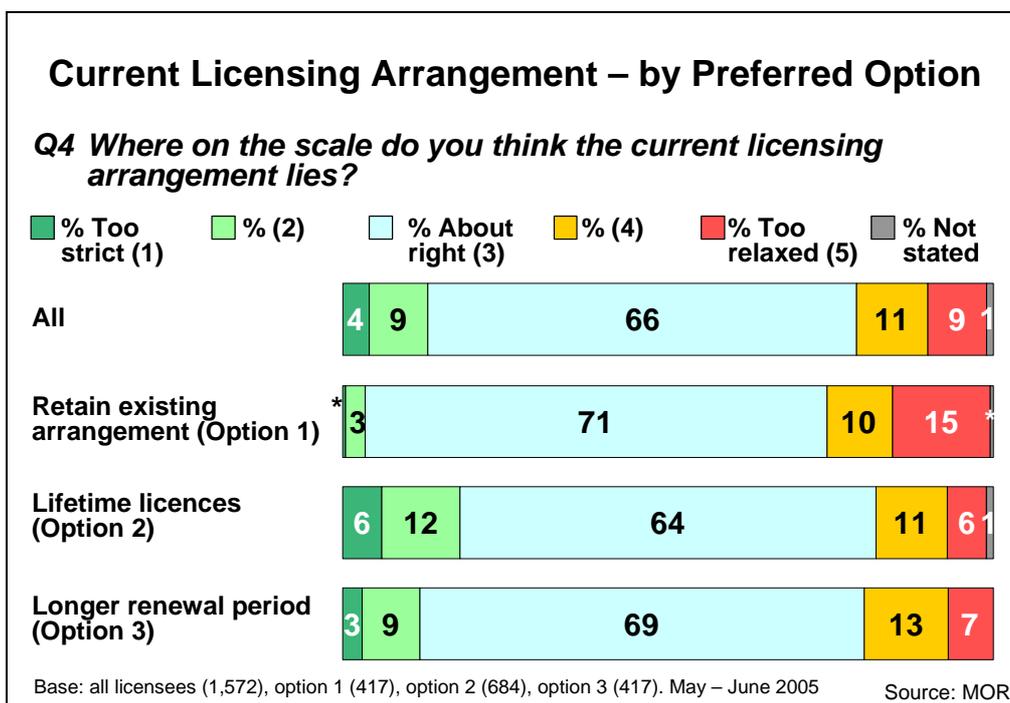
(Male aged 75+, member of RAFARS and local radio club, chose option 3)

However, others think that the current licensing arrangement may discourage would-be licensees from taking up the hobby:

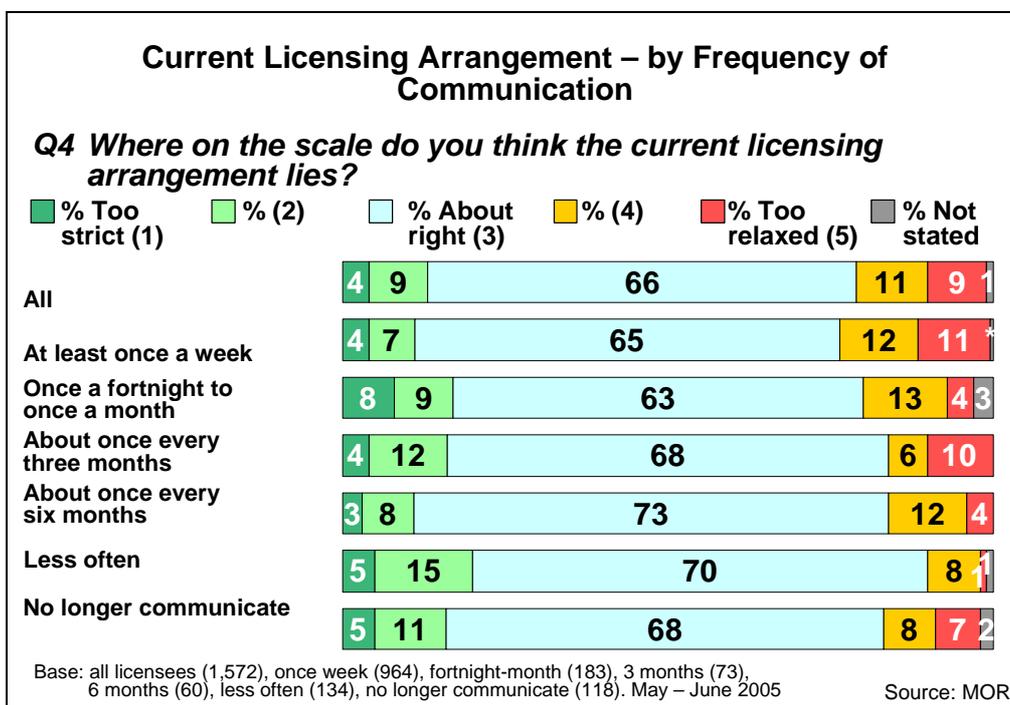
“It is nice to see a lot more younger people now taking an interest in radio, since the M3 was issued, but there would be a lot more, including older people if there was no licence, as many are still put off by exams and cannot travel to radio clubs”.

(Male aged 21 – 44, member of RSGB and RSARS)

Those who prefer to retain the current arrangement are more likely than those opting for a life-time licence or one with a longer renewal period to think that the current system is “too relaxed” whereas those who prefer life-time licensing are more likely to think that the current arrangement is “too strict”.



As clearly demonstrated in the chart to follow, frequent amateur radio users are more likely to consider the current arrangement to be “too relaxed” than are less frequent users.



4.4 Opinions of the best way forward

Central to the MORI study's purpose is the identification of which of four possible options for the future of amateur radio licensing is preferred (Q5).

Ofcom identified four possible ways forward for the future of amateur radio licences and, in summary these are:

Option 1 – Retain the existing arrangement of annual renewal

Option 2 – Replace the existing arrangement with life-time licences

Option 3 – Replace the existing arrangement with a longer licence renewal period

Option 4 – Abolish the licensing arrangement altogether.

To help licensees select which, if any, of the four options they prefer, a separate information sheet was provided which outlined the options in more detail for each of the following aspects:

- Validity of the licence
- Cost and form of the licence
- Method of applying for or issuing the licence
- Notification of changes to the Terms & Conditions
- Amendments to the licence
- Safeguards on standards and competence to operate
- Database
- Ofcom access to the database.

A copy of the Information Sheet is appended to this report.

Licensees were instructed to read the Information Sheet before completing the questionnaire.

The issuing of a life-time licence (Option 2) is considered the best way forward and is the option preferred by 45% of licensees – ahead of retaining the existing arrangement (Option 1) and having longer renewal periods (Option 3) – both selected by 26% of licensees respectively. Option 4 – the abolition of the licensing arrangement - was the least preferred and only selected by 1% of licensees. That is, only nine licensees selected Option 4 and, as such, we have not undertaken any further sub-analysis on those who have selected this option due to the small sample size.

One reason for opposing the abolition of the licence is illustrated by the following comment:

“Exams and licence (are) important to keep up standards of on-air operations – we don’t want the chaos and bad operating that no licence CB offers”
(Male aged 75+, member of RAFARS and local radio club, chose option 2)

Those who are members of a society or club **other than** the RSGB and those who are **not members** of a club or society are more likely to opt for a life-time licence (49% and 54% respectively). RSGB members are found to be less likely to opt for the life-time licence (33%). Indeed, RSGB members preference appears to be split with 33% selecting a life-time licence (Option 2), 33% selecting a longer licence arrangement (Option 3) and 31% selecting the retention of the existing arrangement (Option 1).

The option selected by licensees appears to be influenced by other factors such as gender, frequency of communicating, claimed level of knowledge of the consultation and club membership.

What factors are linked to selecting a life-time licence (Option 2)?

On further investigation, there are many factors linked to selecting each of the options for future licensing and those relating to the selection of Option 2 – the life-time licence are highlighted below.

Gender: Gender appears to be one of the key drivers of selection of this option with a majority (58%) of females preferring this option compared with 44% of males. Females are over four times more likely to select a life-time licence than the existing arrangement (58% vs. 14%).

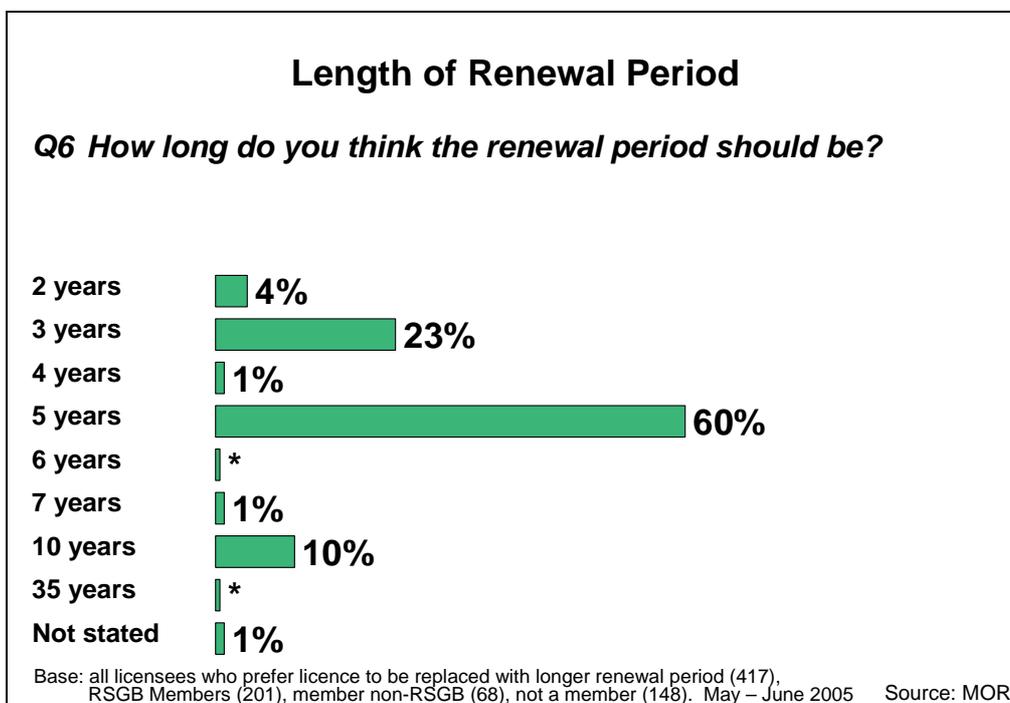
Frequency of communicating using amateur radio: The more frequent communicators – those who use their radio once a week or more are found to be more likely to opt for a life-time licence than to select the other options. However, they are less likely to do so than the less frequent communicators. Almost four in ten (39%) of those who communicate once a week or more often prefer a life-time licence compared with 56% of those who communicate less often than once every six months.

Prior knowledge of the consultation: Those feeling they know at least a “fair amount” about the consultation are less likely to opt for a life-time licence (36%) than those who have heard of but know nothing / know just a little (42%) and those who have heard nothing at all (56%).

Club membership: RSGB members are less likely to have selected a life-time licence (33%) than those who are members of other clubs or societies (49%) and non-club members (54%).

4.5 Length of renewal period

Six in ten of those who prefer a renewal period of **more than one year** would like a five year renewal period, just over a fifth would like a three year renewal period and 10% would like the renewal period to be 10 years. There are no significant differences in preference of the renewal period between members / non-members of RSGB or by age and gender other than those aged 65 years and over are more likely than 45-64s to prefer a three-year renewal period.



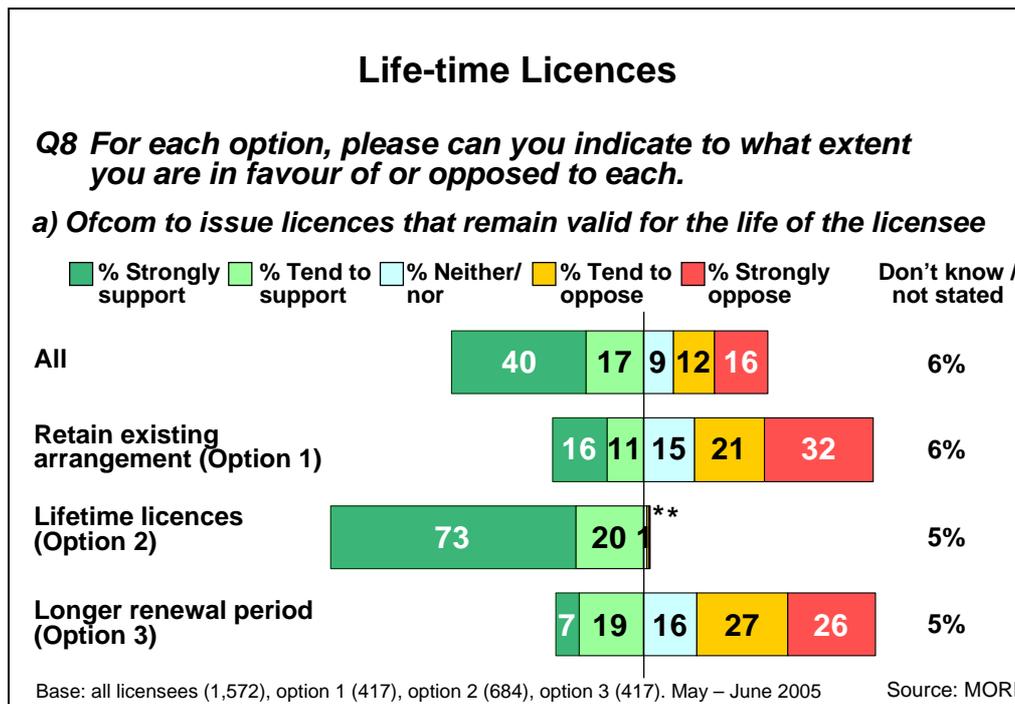
4.6 Life-time licences

One key element being tested is the acceptability, or not, of a life-time licence. When asked, as a separate question, the degree to which licensees are in support of or opposed to Ofcom issuing licences that are valid for life, nearly six in ten (58%) support this move and 28% oppose.

As to be expected, those who opt for a life-time licence (Option 2) earlier in the questionnaire, are found to be more likely than those opting for one of the other arrangements to support the life-time licence (93% in support).

Those who opt for either the retention of the existing arrangement (Option 1) or for a longer renewal period (Option 3) are more likely to oppose than support a move towards a life-time licence - and to a similar magnitude (52% and 53% oppose respectively).

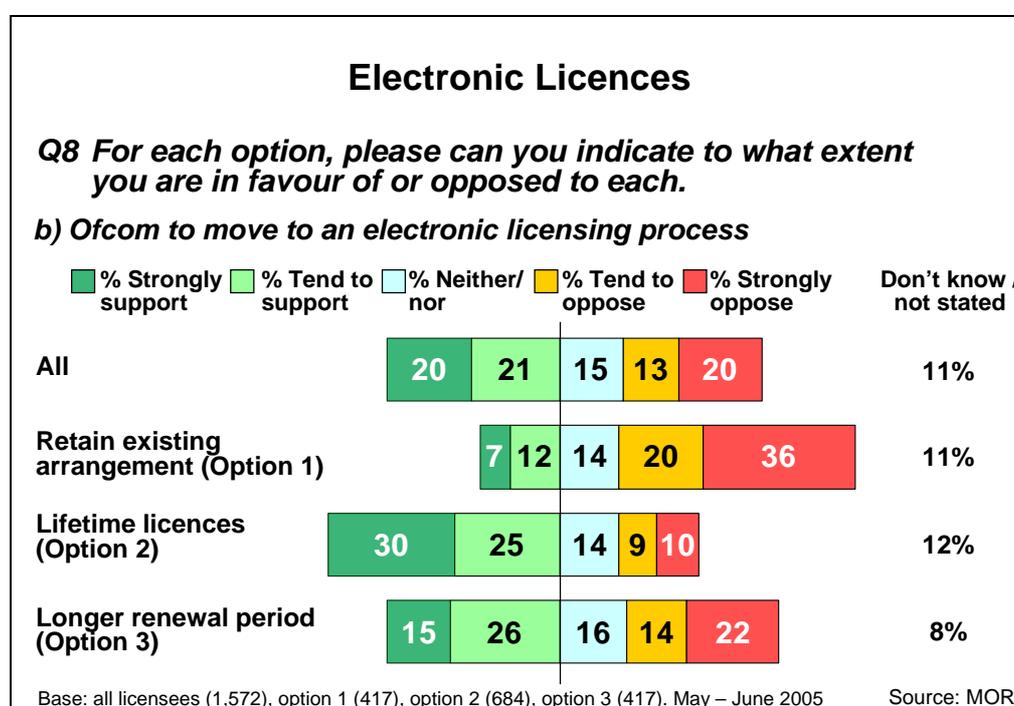
Support for the introduction of a life-time licence is found to be **higher** among less frequent radio users.



4.7 Electronic licences

As well as introducing a licence that will last a life-time, Ofcom is also considering the move to an electronic online web-based licensing process. On being presented with this scenario, just over two fifths of licensees support and one third oppose this move.

Those who previously selected the life-time licence option (Option 2) are found to be significantly more likely than those favouring the other options to support the introduction of an electronic licence. Opposition to electronic licensing is strongest amongst those who would prefer to retain the existing licensing arrangement. Views amongst those opting for a longer renewal period are quite polarised, with almost as many of those in this group opposing as supporting this move.



As to be expected, those who do not use the Internet (13% of the total sample) are much more likely to oppose than support the introduction of electronic licensing, perhaps because they may feel it will be inconvenient or not possible for them to apply for a licence in this way.

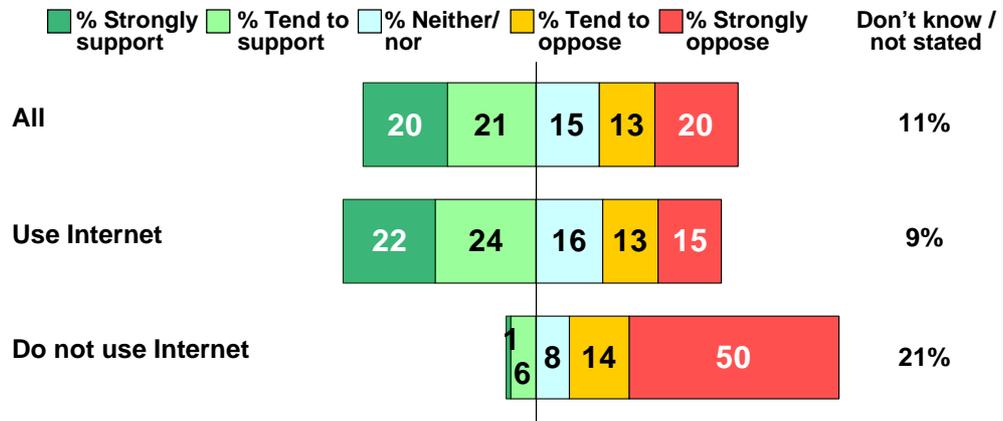
Some licensees experience problems when using the Internet, which has led them to oppose the proposal of using it for amateur radio licensing:

“I am strongly opposed to use of online web-based services by Government departments or agencies. There is a constant battle against spyware / malware when accessing the Internet and experience shows that this gets worse over time”
(Male aged 45 – 64, member of BATC, chose option 3)

Electronic Licences by Internet Usage

Q8 For each option, please can you indicate to what extent you are in favour of or opposed to each.

b) Ofcom to move to an electronic licensing process

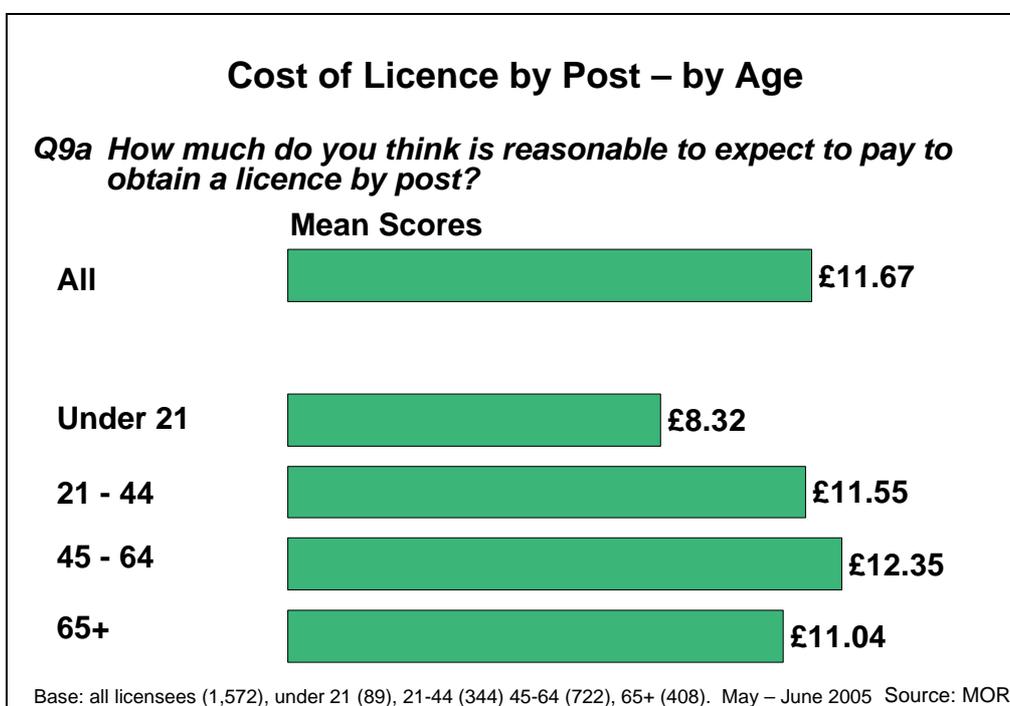


Base: all licensees (1,572), use Internet (1,346), do not use Internet (218). May – June 2005 Source: MORI

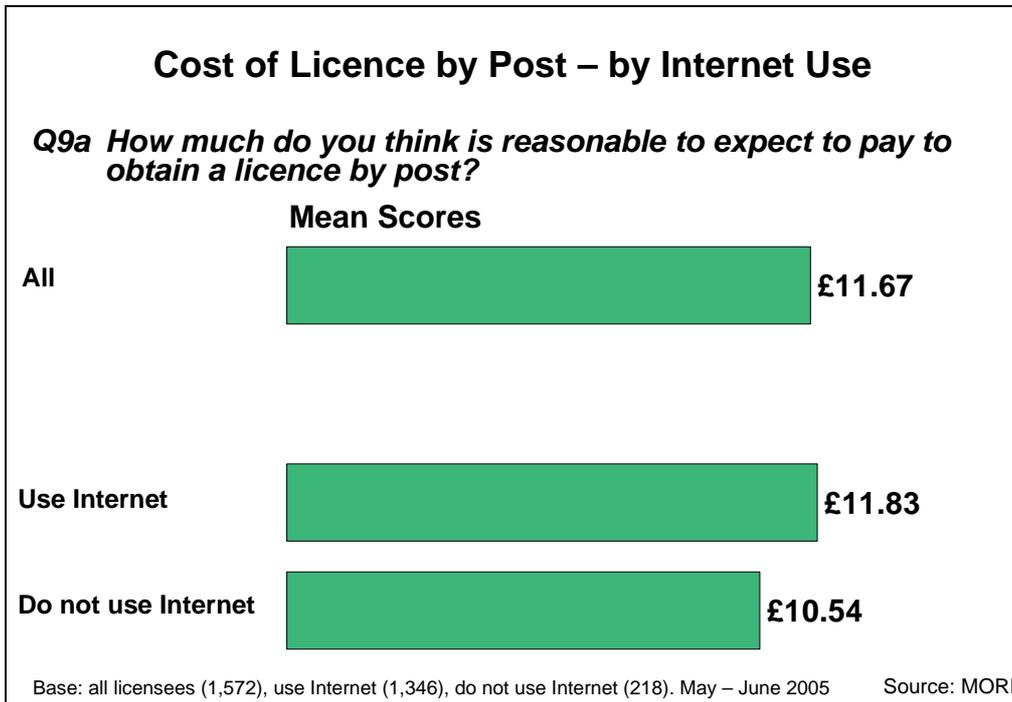
4.8 Cost of postal licence

If an electronic licensing system is introduced there will still be the option to apply for a licence by post.

When asked what they thought was reasonable to expect to pay to obtain a licence by post, costs given as being “reasonable” range from no cost at all to £50, with the average cost being £11.67. This is £3.33 lower than the current fee of £15.00 per annum. On average, those aged 45 to 64 are prepared to pay the highest amount - £12.35. Among those aged either under 21 years or 65 years and over (licences are currently free for those aged under 21 or over 74), the average reasonable cost is thought to be £8.32 and £11.04 respectively.



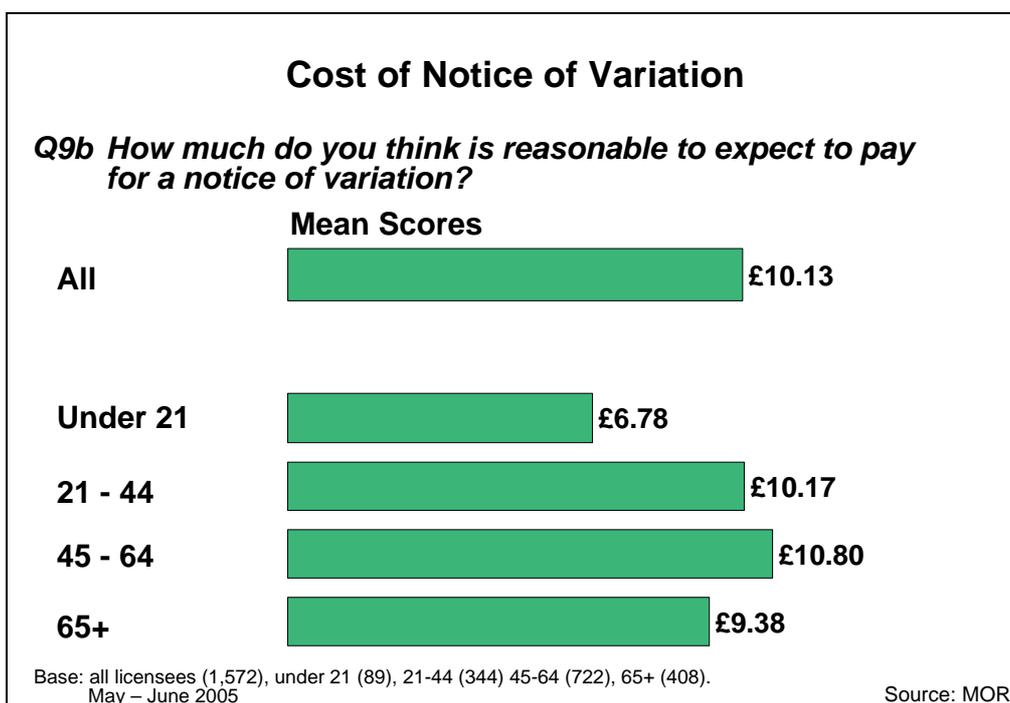
Internet users give a higher average “reasonable” cost for applying for a licence by post than do those who do not use the Internet (£11.83 vs. £10.54).



4.9 Cost of Notice of Variation

A Notice of Variation is issued when there is a variation to a standard licence to permit additional facilities such as an Internet gateway or special event call sign. Notices of Variation are available electronically via Ofcom's website and can also be obtained by post from Ofcom.

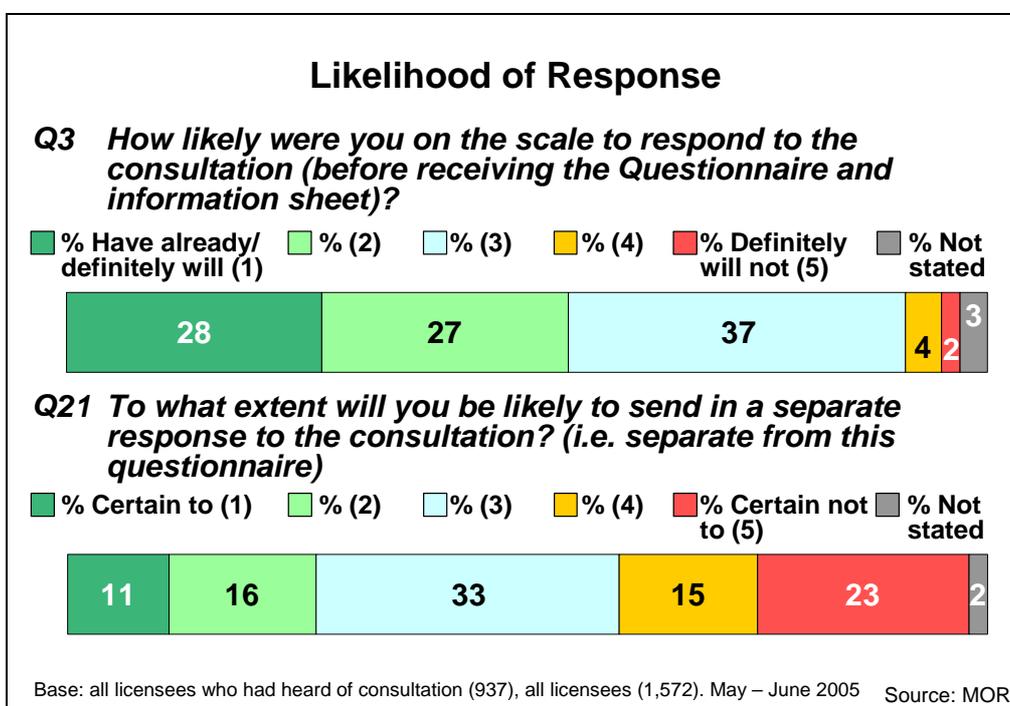
Licencees were asked how much they think is reasonable to expect to pay for a Notice of Variation. Prices given as "reasonable" range from no charge at all to £99 - with an average cost of £10.13. Again, those under 21 and those over 65 years of age put forward a lower than average cost of £6.78 and £9.38 respectively.



4.10 Likelihood of response to the Consultation

Involvement in the MORI survey and completing and returning the questionnaire appears to have provided many licensees with the opportunity to respond to the consultation and, as such, are found to be far less likely to indicate that they will send in a separate response at a later date

Before they had received the questionnaire and Information Sheet from MORI, just over half of licensees had already responded or planned to respond to the Ofcom consultation (55%). This falls to 27% being certain to or likely to respond after taking part in the survey.

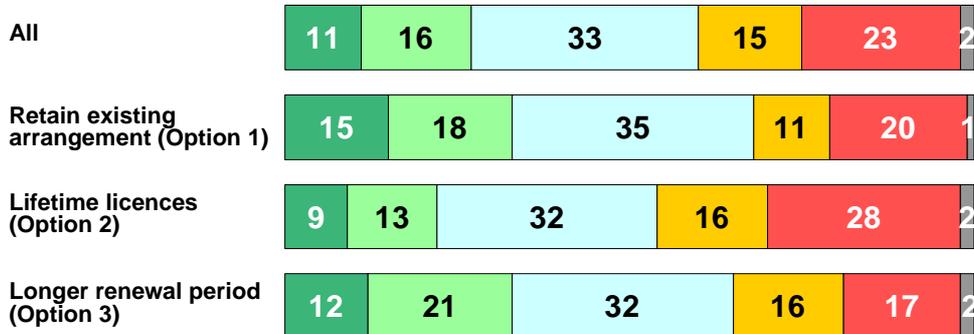


Those who prefer a life-time licence (Option 2) are found to be less likely to say they will send a separate response to the consultation than are those who would like to retain the existing arrangement (Option 1) or those who wish to extend the renewal period (Option 3).

Likelihood of Response – by Preferred Option

Q21 To what extent will you be likely to send in a separate response to the consultation? (i.e. separate from this questionnaire)

■ % Certain to (1) ■ % (2) ■ % (3) ■ % (4) ■ % Certain not to (5) ■ % Not stated



Base: all licensees (1,572), option 1 (417), option 2 (684), option 3 (417). May – June 2005

Source: MORI

The chart to follow clearly shows that the frequent communicators are more likely to want to send in a separate response to the Ofcom consultation than are less frequent communicators.

More than one third (36%) of those who communicate at least weekly are likely to want to send in a separate response compared with only 11% of those who communicate less often than once every six months.

Likelihood of Response – by Frequency of Communication

Q21 To what extent will you be likely to send in a separate response to the consultation? (i.e. separate from this questionnaire)

■ % Certain to (1) ■ % (2) ■ % (3) ■ % (4) ■ % Certain not to (5) ■ % Not stated



Base: all licensees (1,572), once week (964), fortnight-month (183), 3 months (73), 6 months (60), less often (134), no longer communicate (118). May – June 2005

Source: MORI

4.11 Other comments

At the end of the questionnaire licensees were provided with the opportunity to make any other comments about the consultation (Q22). The question was open-ended whereby licensees were able to give a verbatim response.

For ease of analysis, responses have been **grouped** into broad headings and a summary of the comments that feed into each group is appended.

There is some degree of concern that the licence system may be deregulated or abolished altogether and about the implications this would have. In total 11% of licensees hold these types of concern.

“Deregulation must not happen!”

(Male aged 45 – 64, RSGB and local club member, chose option 2)

“I hope that amateur radio stays as it is and doesn’t go down the road of CB!! I suggest the licence fee is increased to £50 per year.”

(Male aged 45 - 64 member of a club other than RSGB, chose option 1)

One in twenty (5%) licensees highlighted the issue of examinations and training in relation to aspects such as their retention, that the current system is not sufficient, or that they should re-introduce or continue Morse code training. Other comments relating to training focussed on the abolishment of training or simplifying the exam process.

“There should be no relaxation in the examination requirements to obtain an amateur licence.”

(Male aged 75+, used to be a member of a club, chose option 2)

A further one in twenty used this opportunity in the questionnaire to point out that they consider the current system to be appropriate and that are happy with the status quo.

“I am content (with) the way Ofcom handles the licence, can’t see any reason for change.”

(Male aged 45 - 64, member of RSGB, RAFAR, WACRAL and a local club, chose option 3)

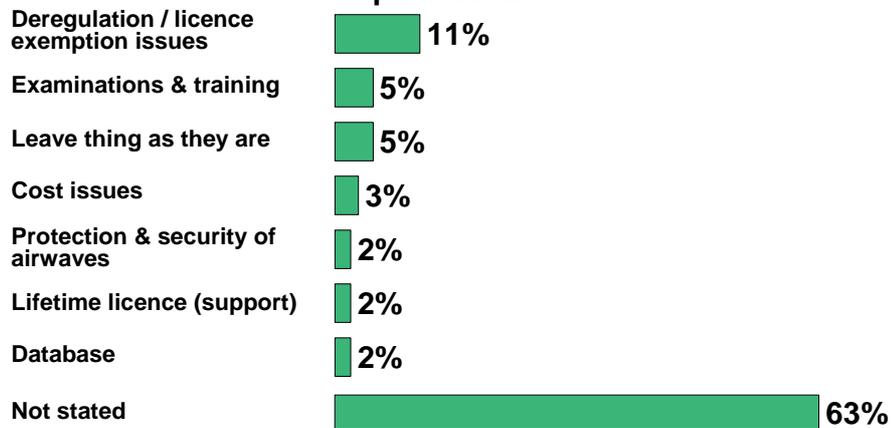
All remaining summary comments were made by fewer than one in twenty licensees.

The questionnaire was carefully designed with the aim of covering the majority of issues under scrutiny in this consultation exercise. This is part evident in the results to this question where more than six in ten (63%) opted not to complete this section - leaving it blank.

Other Comments

Q22 *If you have any other comments that you would like to make, please write in below...*

Top mentions



Base: all licensees (1,572). May – June 2005

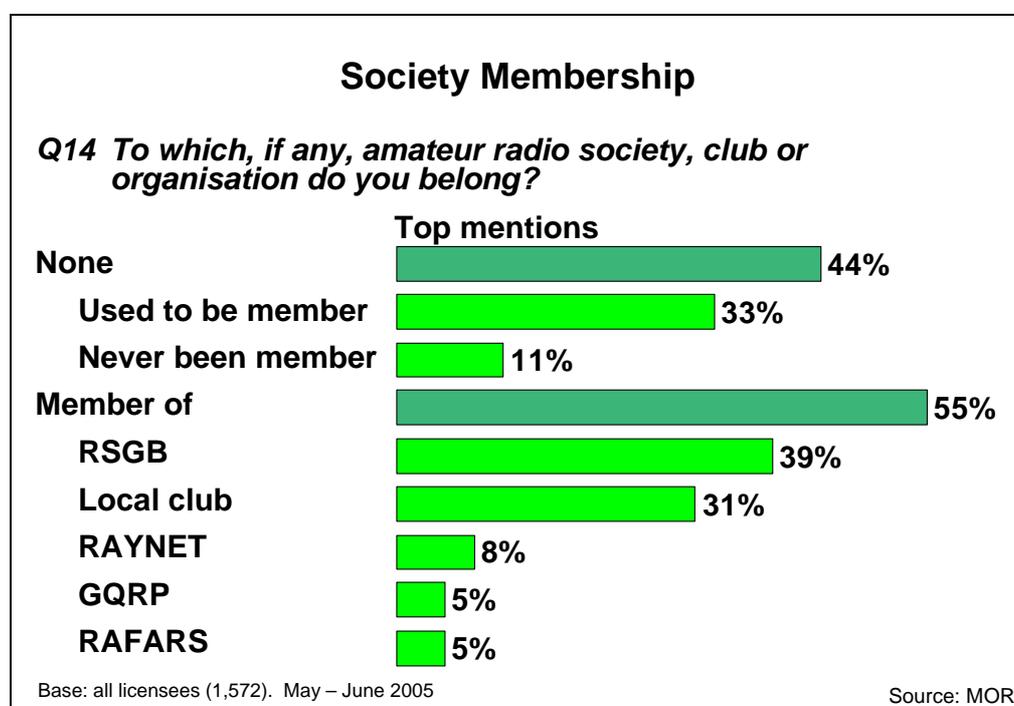
Source: MORI

5. Membership of Amateur Radio Societies

5.1 Society and club membership

The majority (55%) of licensees are members of an amateur radio society, club or organisation, a further 33% used to be but no longer and the remaining 11% have **never** been a member of any.

RSGB emerges as the most frequently named club (39%) followed by a local amateur radio club (31%), RAYNET (8%), GQRP (5%) and RAFARS (5%). Licensees mention numerous others and it is evident that membership of an organisation is very popular among this audience.

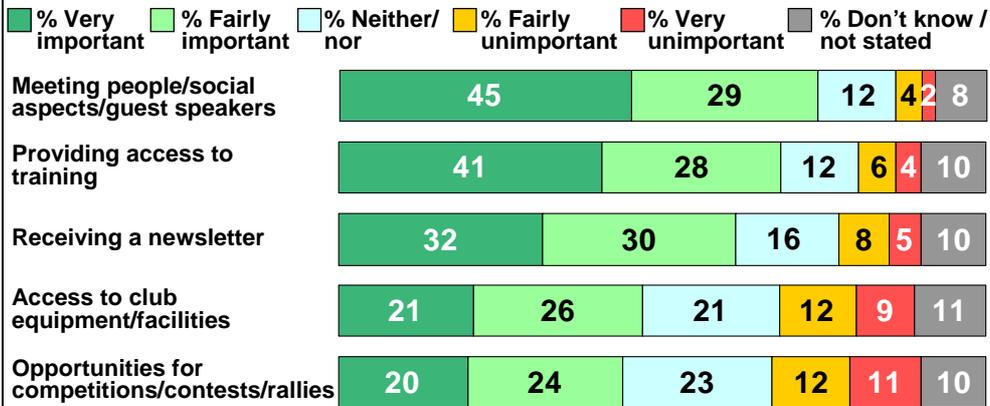


It is quite clear from this survey that membership of a club, society or organisation brings with it many important benefits.

Within the survey, we investigated a variety of benefits club membership may bring ranging across social, educational, training, development and information needs. The importance of all of these aspects clearly shows through.

Benefits of Membership – Overall

Q15 To what extent is each of the following important or not to you personally as part of your membership?



Base: all licensees who are members of an amateur radio club (893). May – June 2005

Source: MORI

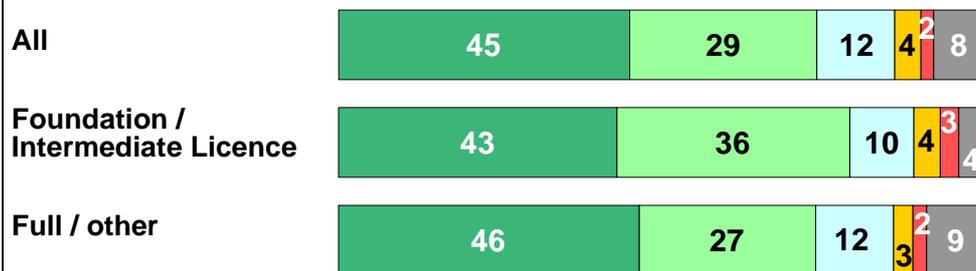
Meeting people with similar interests / social aspects / guest speakers: Of prime importance are the sociable aspects of club membership - whether it is in the form of meeting with others with similar interests, socialising in general or listening to guest speakers. Three-quarters (74%) consider this important with 45% claiming it to be “very important”.

Benefits of Membership – Social – by Licence Type

Q15 To what extent is each of the following important or not to you personally as part of your membership?



Meeting people/social aspects/guest speakers



Base: all licensees who are members of an amateur radio club (893), Full / other holders (554), Intermediate / Foundation (339). May – June 2005

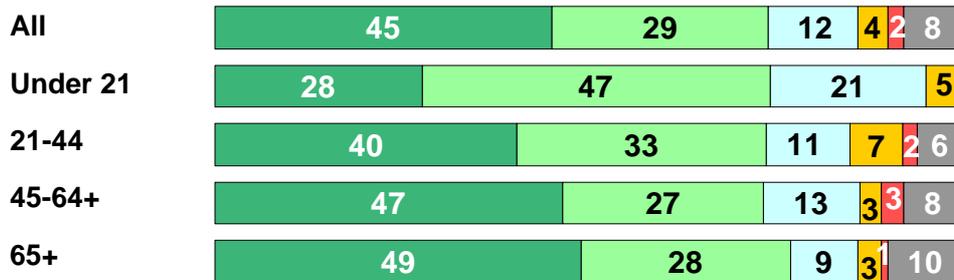
Source: MORI

Benefits of Membership – Social – by Age

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Meeting people/social aspects/guest speakers



Base: all licensees who are members of an amateur radio club (893), Under 21 (40), 21-44 (190), 45-64 (403), 65+ (257). May – June 2005

Source: MORI

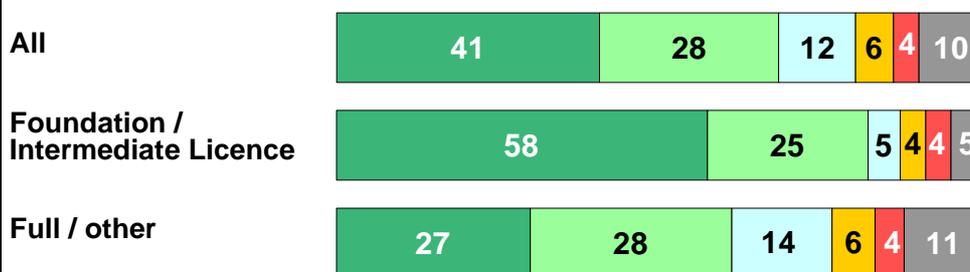
Providing access to training to increase your technical abilities: Providing access to training is also a prime consideration with approaching seven in ten highlighting this element as important – 41% “very important” and 28% “fairly important”. Those holding a Foundation or Intermediate licence and those from the younger age groups – particularly those under 21 years of age - as one would expect, are among the most likely to consider this important in perhaps their preparation for moving to a Full Licence.

Benefits of Membership – Access to Training – by Licence Type

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Providing access to training



Base: all licensees who are members of an amateur radio club (893), Full / other holders (554), Intermediate / Foundation (339). May – June 2005

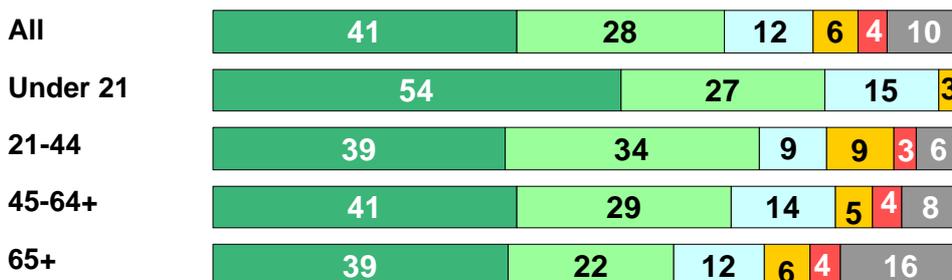
Source: MORI

Benefits of Membership – Access to Training – by Age

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Providing access to training



Base: all licensees who are members of an amateur radio club (893), Under 21 (40), 21-44 (190), 45-64 (403), 65+ (257). May – June 2005

Source: MORI

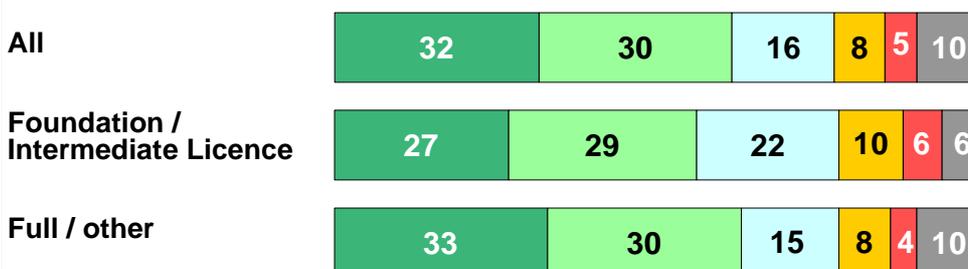
Receiving a newsletter: A great many clubs, societies and organisations produce and distribute their own newsletter. As we highlighted earlier, this is found to be the foremost source of informing this audience of the Amateur Radio Consultation. Six in ten (62%) consider the newsletter as important – 32% “very important”. Newsletters are of particular importance to those who communicate less frequently than once every six months (81%), those who do not use the Internet (76%) and those aged 65 years and over (74%). Findings also suggest that a newsletter is more important among RSGB members (65%) than those who are members of other clubs (54%).

Benefits of Membership – Newsletter – by Licence Type

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Receiving a newsletter



Base: all licensees who are members of an amateur radio club (893), Full / other holders (554), Intermediate / Foundation (339). May – June 2005

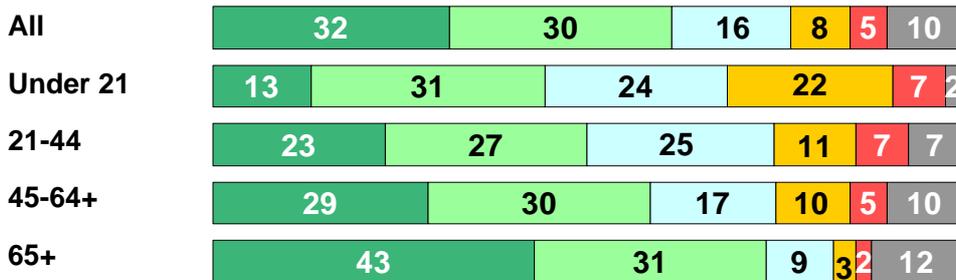
Source: MORI

Benefits of Membership – Newsletter – by Age

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Receiving a newsletter



Base: all licensees who are members of an amateur radio club (893), Under 21 (40), 21-44 (190), 45-64 (403), 65+ (257). May – June 2005

Source: MORI

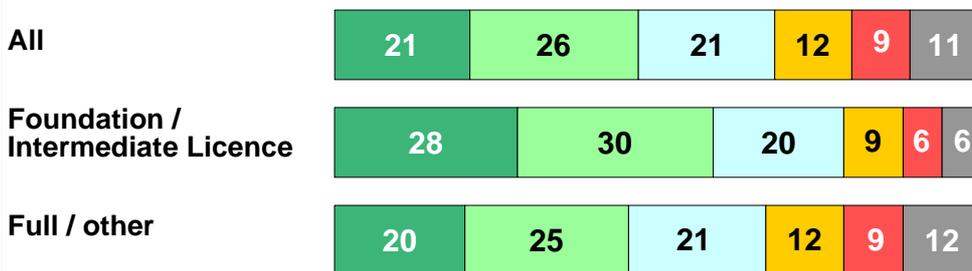
Access to club equipment and / facilities: Whilst two in ten (21%) of licensees claim not to find the access to the clubs equipment and facilities important, a larger proportion do (47%). More frequent communicators (52%) and those holding a Foundation or Intermediate licence are among the most likely to consider this aspect as important.

Benefits of Membership – Access to Facilities – by Licence Type

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Access to club equipment/facilities



Base: all licensees who are members of an amateur radio club (893), Full / other holders (554), Intermediate / Foundation (339). May – June 2005

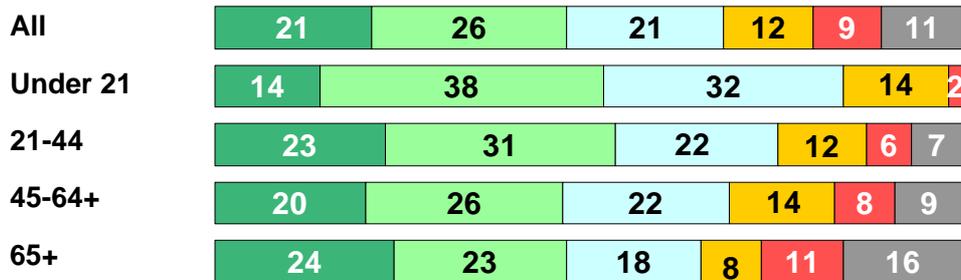
Source: MORI

Benefits of Membership – Access to Facilities – by Age

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Access to club equipment/facilities



Base: all licensees who are members of an amateur radio club (893), Under 21 (40), 21-44 (190), 45-64 (403), 65+ (257). May – June 2005

Source: MORI

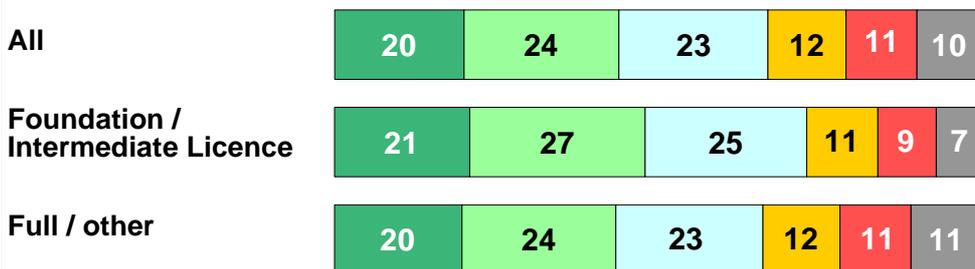
Opportunities to take part in competitions / contests / and rallies: Again, a far larger proportion of licensees deem this element as important (45%) than unimportant (22%). Importance increases among the more frequent communicator and the younger age groups (up to and including 44 years of age).

Benefits of Membership – Competition – by Licence Type

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Opportunities for competitions/contests/rallies



Base: all licensees who are members of an amateur radio club (893), Full / other holders (554), Intermediate / Foundation (339). May – June 2005

Source: MORI

Benefits of Membership – Competition – by Age

Q15 To what extent is each of the following important or not to you personally as part of your membership?

■ % Very important
 ■ % Fairly important
 ■ % Neither/nor
 ■ % Fairly unimportant
 ■ % Very unimportant
 ■ % Don't know / not stated

Opportunities for competitions/contests/rallies



Base: all licensees who are members of an amateur radio club (893), Under 21 (40), 21-44 (190), 45-64 (403), 65+ (257). May – June 2005

Source: MORI

5.2 Next steps

Almost six in ten of the 558 licensees who hold a Foundation or Intermediate licence are considering taking a further course in the future (58%) and a further 12% are actually on a course to obtain the next level licence – rising to 23% among RSGB members.

Appendices

Publication of the Data

As with all our studies, findings from this survey are subject to our standard Terms & Conditions of Contract. Any press release or publication of the findings for this survey requires the advance approval of MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

Statistical Reliability

The sample tolerances that apply to the percentage results in this document are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population of amateur radio licence holders, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

For example, on a question where 50% of the all licensees in a sample of 1,572 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than 2.4 percentage points, plus or minus, from a complete coverage of the entire population using the same procedures.

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
	±	±	±
All (1,572)	1.5	2.2	2.4
Foundation/Intermediate (558)	2.4	3.7	4.0
Full (1,014)	1.8	2.8	3.0
Under 21 years (89)	6.2	9.4	10.3
21 – 44 years (344)	3.1	4.8	5.2
45 - 64 (722)	2.2	3.3	3.6
65 +(408)	2.9	4.4	4.8

Source: MORI

Tolerances are also involved in the comparison of results from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

Size of the sample compared	Differences required for significance at or near these percentage levels*		
	10% or 90%	30% or 70%	50%
	±	±	±
Foundation/Intermediate vs. Full (558 vs. 1,014)	3.0	4.6	5.1
Male vs. Female (1,447 vs. 118)	5.6	8.5	9.3

Source: MORI

* based on 95% confidence level.

Listings for Question 7

Q7 If you think that the existing arrangement should be replaced by something other than life-time or longer renewal licences, or abolished altogether, please can you give an outline of what you think it should be replaced with and why?

Responses from those who wish to abolish the licensing arrangement altogether (question 5) - nine respondents in total:

Respondent 1 - *There are so many people using radios that have never had to sit exams e.g. police / taxi / gas / water / ambulance, etc. it seems like just another source of revenue / tax.*

Respondent 2 - *Need not be replaced with anything, up to users to keep within whatever regulations are in force.*

Respondent 3 - *We now have the mobile phone and Internet which are licence free, so why not amateur radio? As with the M3 call you have all band access apart from 28 MHz. The only difference from a full licence is 90 Watts e.g. M3 is limited to 10 Watts. Also because of where I live I would have to travel 300 miles over 6 weekends to take the intermediate course.*

Respondent 4 - *Simply issued once and then expires with death of a licence holder or when license holder gives up license e.g. no annual fee or life-time fee to re-charged.*

Respondent 5 - *A one-off examination to test your competence to operate and re-test every 10+ years.*

Respondent 6 - *Letter of competence from existing users with five years experience.*

Respondent 7 - *Responsibility on users to check terms and conditions.*

Respondent 8 - *It seems to me that there is total over regulation for its own sake. Many of the older members would disagree because they fear the population would run amok. This has not proved to be the case elsewhere.*

Respondent 9 - *The one remaining respondent did not answer this question.*

Responses from those who wish to replace the existing arrangement with something else (question 5) - ten respondents in total:

Respondent 1 - *Still pay £15 a year via postal but make licence for 5 years renewed and automatic upgrade when licence upgrades e.g. via RSGB.*

Respondent 2 - *Amateur Radio is virtually unknown hobby despite potential for contributions to society. Motoring, which can be dangerous and does not require more than basic proof of user competence to be licensed and enjoyed by millions. Exam is outdated, unnecessary and requirement should be removed completely. It holds back progress for society and industry. The safeguards of type-approval and international law are all that is necessary to a life-time licence with call sign being issued.*

Respondent 3 - *CB was ruined by a free for all - HAM radio seems to be going the same way.*

Respondent 4 - *Validation form should be replaced with plastic card, same size as a credit card.*

Respondent 5 - *Electronically issued licence to be renewed annually free of charge. Email/postal notification of renewal, basically option one but electronic and free of charge.*

Respondent 6 – *1) single level licence issued to all applicants who successfully pass an examination based at an equivalent level to the intermediate licence. 2) That the "examination" administrative and marking duties should be empowered to responsible officials at radio clubs - thus channelling newcomers to the hobby through reliable and proven sources and thus relieving government agencies of unnecessary work loads - this should also remove the power of the RSGB from the examination process as the RSGB does not represent 100% of the UK Amateur Fraternity.*

Respondent 7 - *Not sure.*

Respondents 8 to 10 - *The three remaining respondents did not answer this question*

Details of codes for Question 22

CODE:	Number of mentions
<u>Credit card/photo licence</u>	<u>11</u>
Could we have credit card/plastic licence	9
Photo licence would be a good idea	4
<u>Leave things as they are</u>	<u>77</u>
It's okay as it is/happy as it is/if it ain't broke, don't fix it	77
<u>Internet - access</u>	<u>12</u>
Not everyone/all hams have Internet access	12
<u>Internet - fraud</u>	<u>5</u>
On-line web-based services are too vulnerable to fraud	5
<u>Internet – other (positive)</u>	<u>5</u>
Internet/electronic renewal/change of details	5
<u>Cost issues</u>	<u>40</u>
Licence should be cheaper/free	19
Free/reduced licence for OAPs	5
Licence fee should be increased	8
Increase licence fee period to reduce costs	4
Fair charges/I am concerned about increased charges	5
DEREGULATION/LICENCE EXEMPTION/LICENCE EXEMPTION - OPERATING ABROAD	<u>168</u>
<u>Deregulation issues</u>	<u>89</u>
Don't believe they should deregulate amateur radio	24
Deregulation/making it easier to get a licence would lead to a decline in amateur radio/chaos/abuse	65
<u>Licence exemption</u>	<u>76</u>
Totally opposed to option 4	27
Concerned about it going the same way as CB Radio	18
To scrap licensing would make a mockery of amateur radio/would devalue amateur radio	38
<u>Licence exemption – operating abroad</u>	<u>17</u>
If licence is abolished in the UK, the rest of the world would take sanctions	2
Licence exemption cannot work/will alienate from world radio/would be unable to operate abroad	15

	Number of mentions
CODE:	
<u>Examinations and training</u>	<u>73</u>
We should keep examinations/ relaxation of examinations would be detrimental to amateur radio	43
Present licensing exams are not adequate/do not give sufficient tuition	20
Should re-introduce/continue Morse exams	6
Do away with exams/simplify exams	5
<u>Promotion of amateur radio</u>	<u>7</u>
Need to encourage more young people to participate	7
<u>Protection of security and airwaves</u>	<u>39</u>
Should continue to monitor/police the airwaves	8
Regulation is needed to maintain standards/integrity/security	17
Amateur bands must be protected from commercial/industrial pressures	13
<u>RSGB (positive)</u>	<u>18</u>
RSGB SHOULD be involved in the licensing process	18
<u>RSGB (negative)</u>	<u>13</u>
RSGB should NOT be involved in the licensing process	13
<u>3 Year renewal Licences</u>	<u>10</u>
Licence renewal every 3 years would be adequate/should be every three years	10
<u>5 Year renewal Licences</u>	<u>1</u>
5 year licence/validity period	1
<u>Life-time Licence (support)</u>	<u>39</u>
Prefer option 2/agree with life-time licence	33
Once an amateur gains a full licence it should be for life	5
<u>Longer renewal licences (general support)</u>	<u>3</u>
Prefer option 3/agree with longer licence renewal	3
<u>Database/register</u>	<u>28</u>
Important to have list/register of amateur radio users	15
Amateur radio/register of amateur radio register operators invaluable in an emergency	13
<u>Survey issues</u>	<u>16</u>
Various comments on questionnaire/wording of questions	9
Why weren't all licence holders sent this questionnaire?	7
<u>Want to know more</u>	<u>13</u>
Need more information	13

	Number of mentions
CODE:	
<u>Thanks for listening/not listening</u>	<u>8</u>
I welcome the opportunity to give my views	5
Already made up their minds	3
<u>Lifeline</u>	<u>8</u>
Am unwell/disabled, amateur radio is my lifeline	8
<u>Operating restrictions</u>	<u>4</u>
Bands/levels/power should be increased	4
<u>Current licensing</u>	<u>4</u>
UK licensing is too strict	4
<u>Other</u>	<u>103</u>
Why not have just one licence/not different levels	2
Other comments	102
<u>No additional comments</u>	<u>11</u>
None	1
<u>No response to this question</u>	<u>994</u>

Q5 Which of the following options do you consider to be the best way forward for the licensing of amateur radio?
PLEASE TICK ONE CIRCLE ONLY

Retain the existing arrangement of annual renewal (Option 1 on Information sheet) GO TO Q8

Replace the existing arrangement with life-time licences (Option 2 on Information sheet) GO TO Q8

Replace the existing arrangement with a longer licence renewal period (Option 3 on Information sheet) CONTINUE TO Q6

Abolish the licensing arrangement altogether (Option 4 on Information sheet) GO TO Q7

Replace the existing arrangement with something else GO TO Q7

Don't know GO TO Q8

ANSWER Q6 IF YOU ANSWERED: "REPLACE THE EXISTING ARRANGEMENT WITH A LONGER LICENCE RENEWAL PERIOD" AT Q5

Q6 If you think that the existing arrangement should be replaced by a longer licence renewal period, please can you indicate how long you think the renewal period should be in years?

"I think the licence should be renewed every....."

PLEASE WRITE IN

Years → GO TO Q8

ANSWER Q7 IF YOU ANSWERED: "ABOLISH THE LICENSING ARRANGEMENT ALTOGETHER" OR "REPLACE THE EXISTING ARRANGEMENT WITH SOMETHING ELSE" AT Q5

Q7 If you think that the existing arrangement should be replaced by something other than life-time or longer renewal licences, or abolished altogether, please can you give an outline of what you think it should be replaced with and why?

PLEASE WRITE IN YOUR RESPONSE IN THE SPACE PROVIDED BELOW

ALL TO ANSWER

Q8 As part of the Consultation on Amateur Radio Licensing, Ofcom is considering a number of different options for the amateur radio licence. For the options shown below, please can you indicate to what extent you are in favour of or opposed to each. You may like to re-read the information sheet before responding to these questions.

PLEASE WRITE A NUMBER BETWEEN 1 AND 6 IN EACH BOX FOR a - b BELOW

- 1 = Strongly support 4 = Tend to oppose
2 = Tend to support 5 = Strongly oppose
3 = Neither support nor oppose 6 = Don't know

a) Ofcom to issue licences that remain valid for the life of the licensee

b) Ofcom to move to an electronic (online web based) licensing process

Q9a If Ofcom moves to offering the option of electronic (online web based) licensing and provides this service free of charge, people who either do not have access to the Internet or do not want to use this method will still be able to apply for a licence by post. This will involve some administration costs for the licensing authority.

a) How much do you think is reasonable to expect to pay to obtain a licence by post?

PLEASE WRITE IN TO THE NEAREST POUND

£ . p

Q9b Processing a Notice of Variation* involves some administration costs for the licensing authority. How much do you think is reasonable to expect to pay to obtain a Notice of Variation?

[*a variation to the standard licence to permit additional facilities such as an Internet gateway or special event call sign.]

PLEASE WRITE IN TO THE NEAREST POUND

£ . p

FINALLY, IN ORDER TO HELP ENSURE THAT WE HAVE OBTAINED THE VIEWS OF A REPRESENTATIVE SAMPLE OF AMATEUR RADIO LICENSEES, THESE LAST FEW QUESTIONS ARE ABOUT YOU AND YOUR USE OF AMATEUR RADIO.

Q10 Which type of radio licence do you personally hold?
PLEASE TICK ALL CIRCLES THAT APPLY

- Full/Advanced (previously licence type A or B) GO TO Q12
- Temporary GO TO Q12
- Intermediate (previously Novice) CONTINUE TO Q11
- Foundation CONTINUE TO Q11
- Other GO TO Q12
- Don't know GO TO Q12

ANSWER Q11 IF YOU HAVE AN INTERMEDIATE OR FOUNDATION LICENCE AT Q10 - ANY OTHER ANSWER GO TO Q12.

Q11 Which of the following applies to you?
PLEASE TICK ALL CIRCLES THAT APPLY

- I am currently on a course to obtain the next level licence
- I am considering taking a further course in the future
- I am not considering taking a further course
- Don't know

ALL TO ANSWER

Q12 For how long have you held an amateur radio licence?
PLEASE TICK ONE CIRCLE ONLY

- Less than one year
- One to five years
- Six to ten years
- Eleven to twenty years
- Over twenty years
- Don't know

Q13 How often, if at all, do you communicate using your amateur radio?
PLEASE TICK ONE CIRCLE ONLY

- Several times a week
- About once a week
- About once a fortnight
- About once a month
- About once every three months
- About once every six months
- About once a year
- Less than once a year
- No longer communicate
- Don't know

Q14 To which, if any, amateur radio society, club or organisation do you belong?

PLEASE TICK ALL CIRCLES THAT APPLY

- None, I have never been a member of an amateur radio society or club
- None, but I used to be a member of an amateur radio society or club

I am a member of:
PLEASE TICK ALL CIRCLES THAT APPLY

- A local amateur radio club
- AMSAT-UK
- BATC
- BATG
- GQRP
- RAFARS
- RAIBC
- ROTA
- RAYNET
- RNARS
- RSARS
- RSGB
- STELAR
- UK μ G
- WACRAL
- Other
- Don't know

IF YOU ARE A MEMBER OF AN AMATEUR RADIO CLUB OR SOCIETY, PLEASE ANSWER Q15 - OTHERS GO TO Q16

Q15 Considering your membership of an amateur radio club or society, to what extent is each of the following important or not to you personally as part of your membership?
PLEASE WRITE A NUMBER BETWEEN 1 AND 6 IN EACH BOX FOR a - e BELOW

- 1 = Very important
- 2 = Fairly important
- 3 = Neither important nor unimportant
- 4 = Fairly unimportant
- 5 = Very unimportant
- 6 = Don't know

- a) Meeting people with similar interests/ social aspects/guest speakers
- b) Providing access to training to increase your technical abilities
- c) Opportunities to take part in competitions/ contests/rallies
- d) Access to club equipment and /or facilities
- e) Receiving a newsletter

ALL TO ANSWER

Q16 Which of the following age groups do you fall into?
PLEASE TICK ONE CIRCLE ONLY

Under 16 years

(PLEASE ENSURE THAT YOUR PARENT OR GUARDIAN HAS SIGNED THE ACCOMPANYING AUTHORISATION SLIP AND RETURN THE SLIP WITH THE QUESTIONNAIRE)

16 - 20 years

21 - 44 years

45 - 64 years

65 - 74 years

75 years or older

Q17 Are you male or female?
PLEASE TICK ONE CIRCLE ONLY

Male

Female

Q18 Do you use the Internet?
PLEASE TICK ALL CIRCLES THAT APPLY

Yes, at work

Yes, at home

Yes, place of study or elsewhere

No

Q19 In which area do you live?
PLEASE TICK ONE CIRCLE ONLY

London/South East/East of England

North East England/Yorkshire and Humberside

North West England/Isle of Man

Midlands

South West England/Channel Islands

Wales

Scotland

Northern Ireland

Don't know

Q20 What are the first two to four characters of your postcode?

[e.g. if your postcode is W4 3QP you would write in
W4], but if it is KT15 8AY you would write
KT15]

PLEASE WRITE IN

(FIRST PART OF POSTCODE)

Q21 Having read the questionnaire and information sheet and taken part in this survey, to what extent will you be likely to send in a separate response to the consultation (i.e. separate from this questionnaire)?
PLEASE TICK ONE CIRCLE ONLY

Certain to Not sure Certain not to

Q22 If you have any other comments you would like to make about the amateur radio licence consultation please write in below
PLEASE WRITE IN YOUR RESPONSE IN THE SPACE PROVIDED BELOW

THE MORI PROMISE

As an independent, objective research company, MORI promises that your questionnaire will never be linked to you as an individual. We will NOT analyse the information you have given us in such a way that you can be identified individually. We have a rule whereby we do not look at the views of groups of fewer than ten people separately. MORI is a member of the Market Research Society and is bound by its Code of Conduct not to identify individual respondents' views.

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE

Please return it in the pre-paid envelope to:

MORI
MORI House
79-81 Borough Road
London
SE1 1FY

Letter to Respondent

Amateur Radio Licensing Questionnaire

Dear

You may already be aware that Ofcom is currently conducting a public consultation into the way in which amateur radio licences are issued. As part of this consultation, Ofcom has commissioned MORI, an independent research agency, to conduct a piece of research to find out what amateur radio licence holders think.

Amateur radio is an important and popular hobby and is often used as a vehicle for fostering technical careers and research. Over 63,000 people currently hold amateur radio licences within the UK and many of these actively communicate with fellow amateurs at home and abroad using a broad spectrum of technologies.

We would be very grateful if you could complete the enclosed questionnaire and return it to MORI. As an independent, objective research company, MORI promises that your questionnaire will never be linked to you as an individual. We will NOT analyse the information you provide in this questionnaire in such a way that you can be identified individually. MORI is a member of the Market Research Society and is bound by its Code of Conduct not to identify individual respondents' views.

The information you provide will help Ofcom to inform their final decisions on the appropriate regulatory regime for amateur radio for the next 20 years. We hope you will take this opportunity to make your views known.

Yours sincerely



Caroline Callahan
Research Director



IMPORTANT:

If you are under 16 years of age, please show this letter and questionnaire to your parent/guardian and ask them to read through it and sign the declaration below to indicate that they give their consent for you to take part in this survey. Please return this slip to MORI with your questionnaire. Please be assured that no record of your name will appear on your questionnaire, MORI will store all such slips separately, in order to conform with the Data Protection Act.

As the parent/guardian of the person to whom this letter is addressed, I hereby give my consent for them to take part in MORI's survey of amateur radio licence holders and complete the enclosed questionnaire.

Parent/guardian's signature _____ Parent/guardian's
Name: _____

Address _____ Date _____

INFORMATION SHEET

Summary of options for the reform of amateur radio licensing

Ofcom is considering four different options for the future of amateur radio licensing which are outlined in the table below:

	Option 1	Option 2	Option 3	Option 4
Aspects of Licensing:				
Validity of licence	Annual	Life of licence holder	For a period longer than annual but requiring renewal on a regular basis	Licence exemption – no licence required.
Cost and form of licence	Paper – currently £15 per year	Free – electronic, printable licence (probably PDF® document) Option of a paper licence – for which an admin fee would be charged	Paper or electronic Fee to be confirmed	None – therefore, not available for inspection by foreign administrations
Method of applying for or issuing licence	Postal	On-line, web-based self-service licensing system Postal option retained	Postal or on-line	None
Notification of changes to Terms and Conditions	Notification by post	On-line notification Postal notification– a one-off charge at time of issuing licence would be made to cover all further notifications	Notification by post or on-line	Responsibility on users to check Terms and Conditions
Amendments to licence	As existing, notification by post	Licence re-issued electronically if licence details (name, address or type of licence) change	Postal or on-line	None
Safeguards on standards and competence to operate	As existing, by examination	As existing, by examination	As existing, by examination	Still need for conditions to be attached to licensing exemption regulation (e.g. valid Radio Amateur Examination pass certificate)
Database	Yes, names and addresses	Yes, names and addresses	Yes, names and addresses	No – call signs would still be allocated
Ofcom access to database	Available to Ofcom regional staff to investigate reports of radio interference	Available to Ofcom regional staff to investigate reports of radio interference	Available to Ofcom regional staff to investigate reports of radio interference	None – potentially hindering investigations of radio interference.