

## UK summary

This summary document highlights the key themes across the UK identified in this year's Nations and Regions Communications Market Report.

### **30% of adults have used the internet to watch video content**

Consumers are experimenting with new ways of receiving audio-visual and internet content, and making phone calls:

- 30% of adults have used the internet to watch video content. This was consistent across the nations, with the exception of Wales where the figure stood at 24%, likely related to lower broadband penetration. Across the regions, adults in London (40%) and Edinburgh (45%) were the most likely to have watched video content online.
- 20% of adults have accessed the internet using a mobile phone. Adults in London (32%), Aberdeen (31%) and Dundee (34%) were most likely to have done this, with those in North West England least likely (14%).
- 17% of adults have used a mobile phone to listen to audio content. Highest and lowest use were in London and the East Midlands, at 19% and 11% respectively.
- 12% of adults have used the internet to make VoIP phone calls. Those in London and the South East were most likely to have used VoIP (20%) and those in the East Midlands and North East England were least likely (7%).
- 4% of adults have used a mobile phone to watch video content. Those in the South East and North East had the highest use (6%), while the lowest use was found in the North West (2%).

### **TV viewing is highest in Scotland and the North East of England**

BARB data show that people in the UK spend an average of 3.6 hours per day watching television. Viewing is highest in Scotland and the North East of England, at 4.0 hours per day, and lowest in London and the ITV West regions, at 3.1 and 3.0 hours per day respectively.

In Northern Ireland, the majority of homes (71%) receive television channels from the Republic of Ireland and almost one-third watch these channels every day, with another 40% watching at least once a week.

### **Home ownership of digital television has increased across the UK**

According to our survey, 85% of UK homes now have digital television at home. This represents an increase of ten percentage points since our last survey, conducted across 2006.

Similar increases were seen across the UK's nations, with the exception of Wales, where there was a more modest increase of two percentage points.

Consumers in Wales were previously the most likely to have digital TV at home, where wider and earlier adoption of satellite television was driven by reception

problems with analogue terrestrial TV and a desire to receive Channel 4 alongside S4C.

Ownership of digital TV was lower in rural areas (81%) than in urban areas.

Take-up is highest in Sunderland (96%), Cardiff (95%) and Glasgow (95%).

### **Wales has the highest level of radio listening**

People in Wales listen to the most radio in the UK, spending an average of 24.4 hours per week listening. Average weekly listening was 23.5 hours in England, 23.1 in Northern Ireland, and lowest in Scotland at 22.9.

### **Consumers in urban areas are increasingly reliant on mobile telephony**

UK household penetration of fixed line telephones has fallen three percentage points since 2006, to 87%. At the same time, personal ownership of mobile telephones has increased by three percentage points, to 84%.

The fall in ownership of fixed-line phones has been greatest in urban areas of the UK, having fallen to 86%. Use of fixed-line telephony remains relatively high in rural areas, at 93%.

The net result of the shift from fixed to mobile telephony is that 12% of households in the UK now rely on mobile telephony. Mobile-only households are particularly prevalent in urban locations in the north of the UK, such as Liverpool (21%), Manchester (19%), Glasgow (20%) and Belfast (23%). However, in London the proportion relying on mobile telephony is lower than average (7%).

Landline ownership correlates with broadband ownership. However the availability of mobile broadband services means that ownership of a landline is no longer a pre-requisite for many for a broadband connection, so this may change in the coming years.

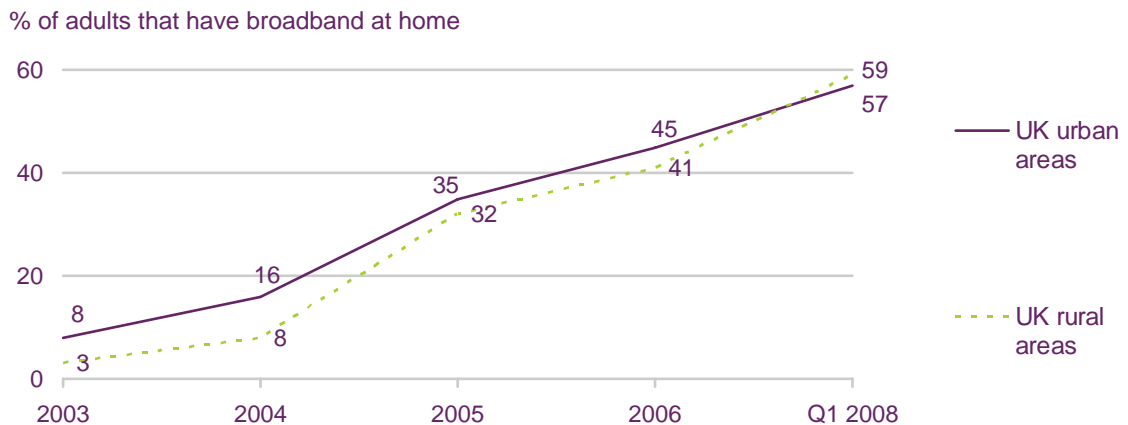
### **Broadband take-up in rural areas has caught up with urban areas**

Across the UK there has been a significant increase in broadband take-up. Nearly 6 in 10 homes (57%) in the UK now have a broadband internet connection. Just 8% of homes now rely on a narrowband dial-up internet connection. England, Scotland and Northern Ireland have all seen increases of ten percentage points or more since our 2006 survey.

Sunderland has the highest take-up of the cities we surveyed (66%), followed by Aberdeen (64%) and Edinburgh (62%).

As shown in the chart below, the UK's rural areas have seen the biggest increases in broadband take-up and those living in these areas are now equally or more likely than those in urban areas to have broadband at home (with our survey reporting take-up of 59% and 57% respectively).

### Broadband take-up trend



Glasgow has one of the lowest levels of broadband take-up (32%). Take-up in Glasgow is constrained by the lower than average ownership of PCs and is also probably related to low income.

Ofcom's media literacy research found that UK adults with internet claimed to spend an average of 12.1 hours online each week. Time spent online was highest in England (12.4 hours) and lowest in Northern Ireland (9.6 hours).

### Non-ownership of services is due to perceived cost and lack of interest

Across the UK, consumers who do not have fixed-line phones, mobile phones, broadband or digital televisions typically say that this is because they don't want them or that the cost is too high. Less than 1% of survey respondents said that lack of service availability was a reason for not having one of these services.

### Take-up and use of communications services

	UK 2007	UK 2008	UK urban 2008	UK rural 2008
<b>Convergence</b>				
	% of adults (unless stated)			
Use of VoIP at home	11%	12%	12%	12%
Watching video content online	N/A	30%	30%	30%
Listening to the radio online	N/A	13%	13%	14%
Internet access with a mobile phone	N/A	20%	21%	15%
Watching video on a mobile phone	N/A	4%	4%	4%
Listening to audio content on a mobile phone	N/A	17%	17%	11%
Use of social networking sites	N/A	20%	20%	22%
<b>Television</b>				
Digital television ownership	75%	85%	85%	81%
Average hours viewed per day	3.8 hours	3.8 hours	N/A	N/A
<b>Radio</b>				
DAB set ownership (among radio listeners)	18%	22%	22%	17%
Average hours listened to per week	23.5 hours	23.5 hours	N/A	N/A
<b>Telecommunications</b>				
Fixed line phone at home	90%	87%	86%	93%
Mobile phone ownership	81%	84%	84%	84%
3G phone ownership	17%	17%	18%	12%
Internet at home	61%	65%	64%	69%
Broadband at home	45%	57%	57%	59%

*Note that the latest DTV update showed Digital TV take-up of 86.7%. The small difference between these figures is due to use of different methodologies.*