1.2 The market in context

Figure 1.1

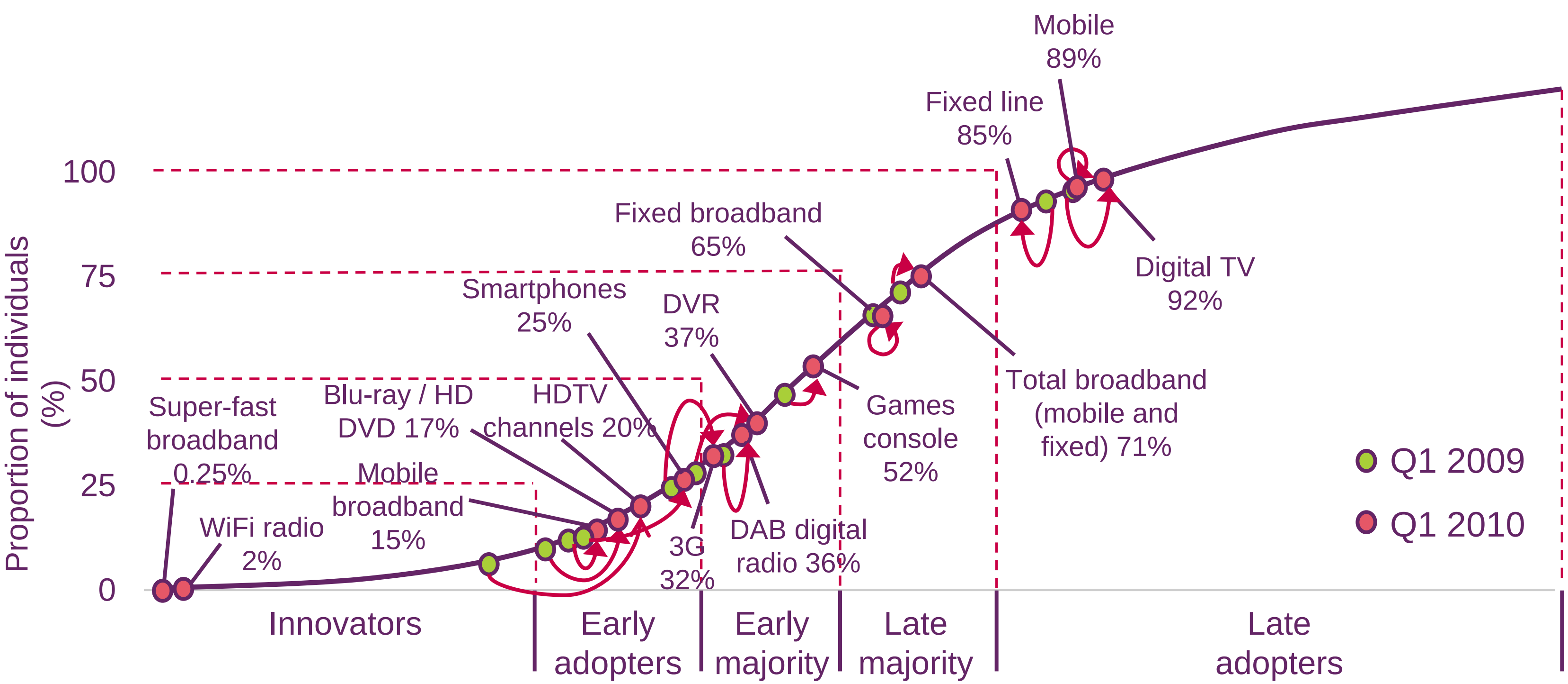
Digital communications service availability, 2008 and 2009

Platform	UK 2009	UK 2008	UK change		England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0%		100%	100%	100%	100%
2G mobile[1]	97%	n/a	n/a		99%	87%	89%	89%
3G mobile[2]	87%	n/a	n/a		91%	66%	69%	40%
DSL[3]	99.6%	99.6%	0.0%		-	-	-	n/a
Cable broadband[4]	48%	49%	-1%		51%	37%	23%	30%
LLU[5]	85%	84%	1%		87%	71%	77%	69%
Digital satellite TV	98%	98%	0%		-	-	-	-
Digital terrestrial TV[6]	73%	73%	0%		82%	82%	98%	66%

Sources: Ofcom and:
1. Proportion of population living in postal districts where at least one operator reports at least 90% 2G area coverage. Sourced from GSM Association / Europa Technologies
2. Based on Q2 2010. Proportion of population living in postal districts where at least one operator reports at least 90% 3G area coverage. Source from GSM Association / Europa Technologies. Data is not comparable with previous report
3. Proportion of premises able to receive DSL services based on data reported by BT
4. Proportion of households passed by Virgin Media's broadband-enabled network
5. Proportion of households connected to an LLU-enabled exchange
6. Availability of services from all six multiplexes

Figure 1.2

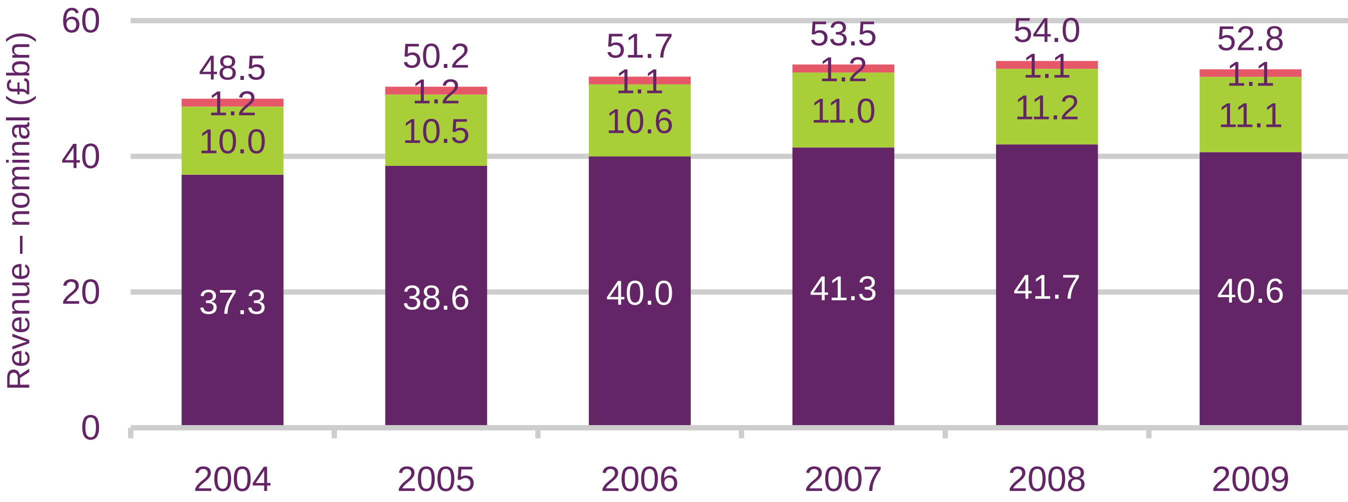
Digital technology adoption, Q1 2009 and Q1 2010



Source: Ofcom research and operator data
Notes: All figures are measured as a proportion of individuals except for 3G, which represents the proportion of mobile subscribers and HDTV and DTV, which represent the proportion of homes with a digital television reception device on the main set.

Figure 1.3

Communications industry revenue

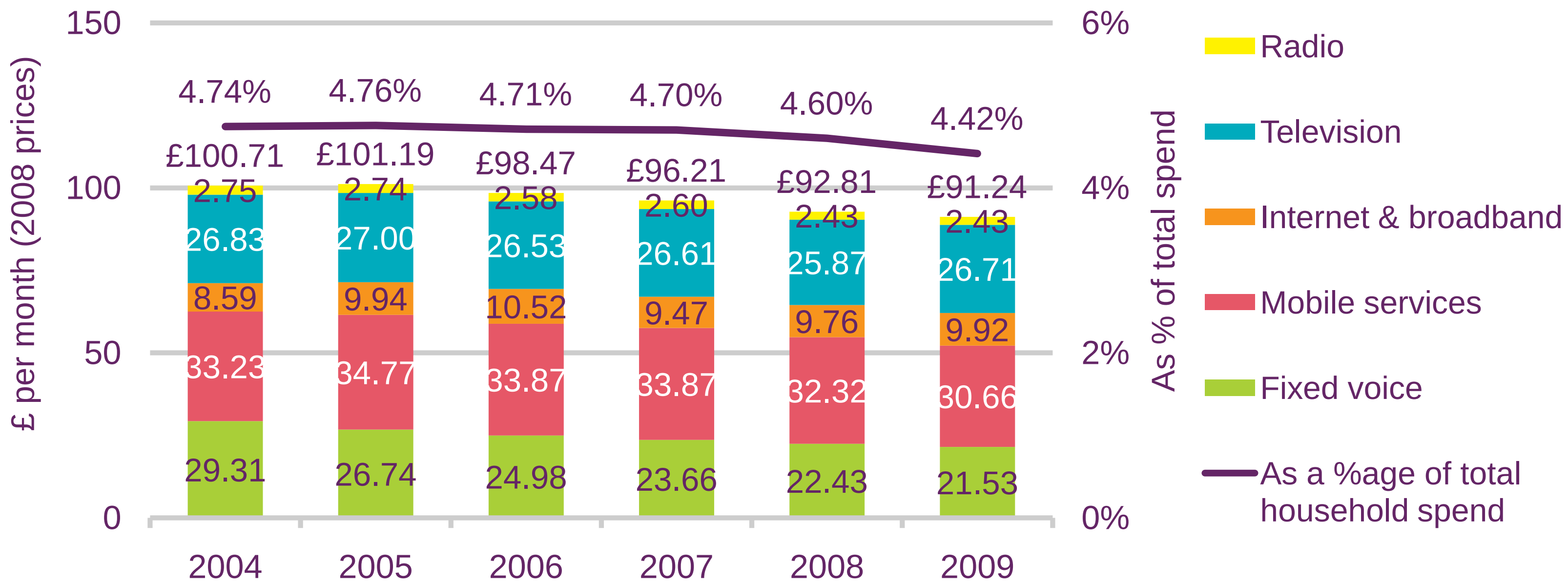


	1 year growth	5 year CAGR
Total	-2.3%	1.7%
Radio	-4.0%	-1.2%
TV	-0.4%	2.1%
Telecoms	-2.7%	1.7%

Source: Ofcom / operators
Note: Includes licence fee allocation for radio and TV

Figure 1.4

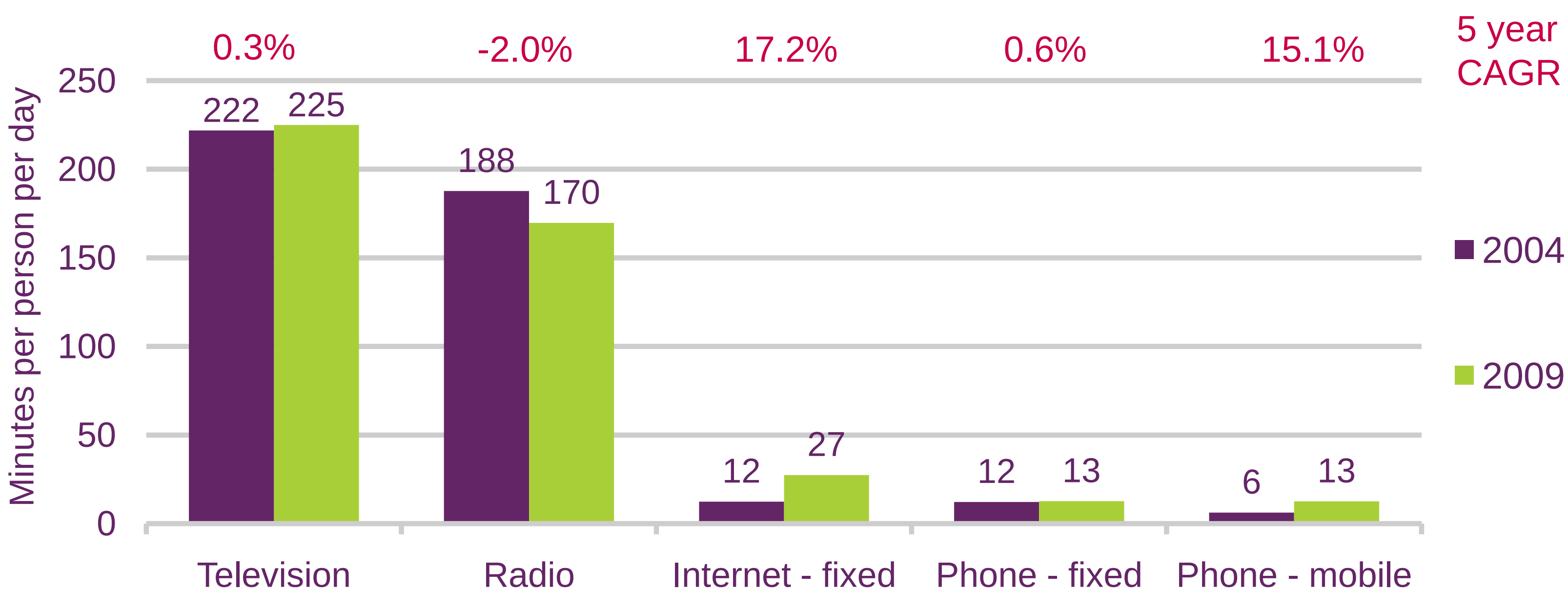
Average household spend on communications services



Source: Ofcom / operators

Figure 1.5

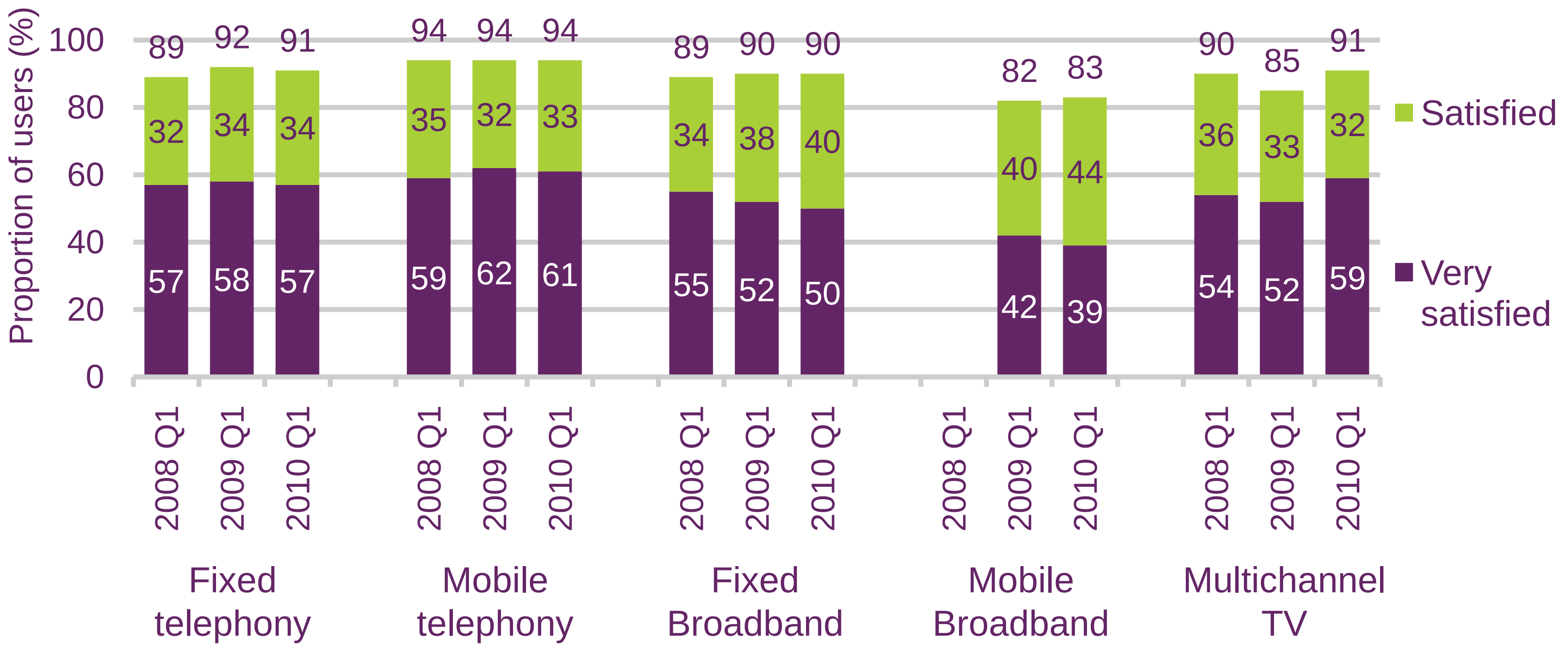
Average time per day spent using communications services



Source: Ofcom / BARB / RAJAR / Nielsen Netratings (home use only)
Note: Daily figures were calculated from monthly data on the assumption that there are 30.4 days in the average month; the exception was for internet consumption where the quoted figures relate to May 2004 and May 2009, and 31 days were used; the internet consumption figures include the use of online applications such as streaming media and only include use at home; mobile telephony figures are estimated assuming that the average time taken to send and receive a text message is 35 seconds.

Figure 1.6

Overall satisfaction with communication services

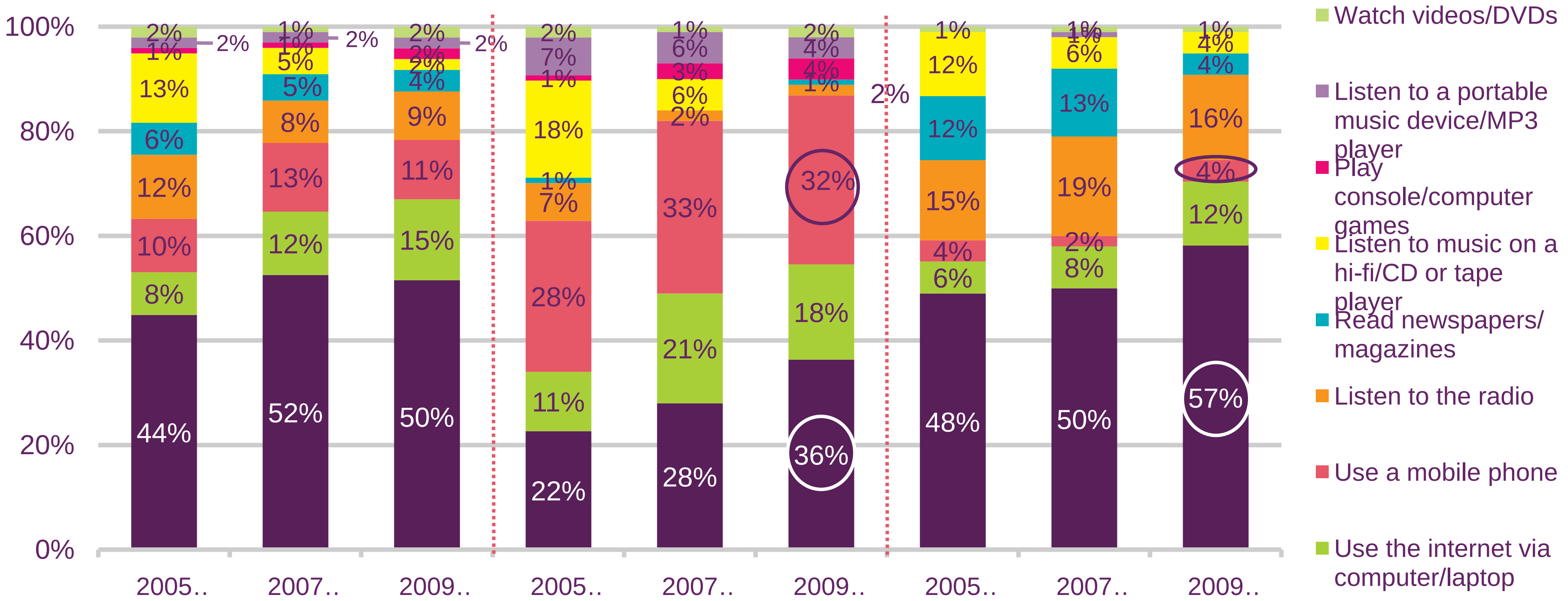


Source: Ofcom research

Note: Shows the proportion of users with each service, includes only those who expressed an opinion.

Figure 1.7

Which media activity would consumers miss the most



A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 1824 in 2009), adults aged 16-24 (530 in 2005, 413 in 2007, 253 in 2009), adults aged 25-34 (604 in 2005, 473 in 2007, 274 in 2009), adults aged 55-64 (412 in 2005, 344 in 2007, 276 in 2009).
Circles show statistically significant change between 2007 and 2009.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009 and September to October 2009

1.3 The consumer’s digital day

Figure 1.8
Fast Facts

	All 16+	16-24s	25-44s	45-54s	55+	Men	Women	Working	Not Working
Time Awake (minutes per day)	945	913	945	961	951	951	939	953	935
Time spent with media and communications (minutes per day)	425	395	438	442	416	453	398	437	410
Proportion of media and communications time that is solus	80%	71%	77%	81%	88%	80%	81%	78%	84%
Proportion of media and communications time that is simultaneous	20%	29%	23%	19%	12%	20%	19%	22%	16%
Amount of media and communications activity (minutes per day)	528	572	564	537	467	576	482	553	495
Watching video (% of all activity)	40%	32%	36%	37%	52%	38%	42%	35%	48%
Listening to audio (% of all activity)	17%	14%	17%	22%	17%	18%	17%	18%	16%
Voice communication (% of all activity)	5%	6%	5%	6%	5%	5%	6%	6%	5%
Text communication (% of all activity)	15%	30%	18%	11%	6%	16%	15%	16%	14%
Print Media (% of all activity)	6%	3%	4%	5%	10%	5%	7%	5%	8%
Games (% of all activity)	3%	5%	3%	2%	1%	3%	2%	3%	3%
Other internet (% of all activity)	7%	5%	8%	9%	4%	8%	5%	8%	4%
Other media (% of all activity)	7%	5%	9%	9%	4%	8%	5%	10%	3%

XX	Percentage figure is significantly higher than the population average
XX	Percentage figure is significantly lower than the population average

Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373; men = 3815; women = 4151; working = 4417; not working = 3549

Figure 1.9

Media consumption activities

Activity category	Activity subcategories	Activities
Video	Television – TV	Television set: TV live; Television set: recorded TV on PVR; Television set: recorded TV on DVD/VHS; Television set: TV on-demand
	Television - other	TV or films on-demand or live on a computer; TV or films on-demand on a mobile phone
	Other video	DVDs or videos (rented or bought); Video clips on a computer; Downloaded TV, films or video clips on a computer; Downloaded TV, films or video on a mobile phone; Downloaded TV, films or video on hand-held device.
Audio	Radio – radio set	Live radio on a fixed or portable set
	Radio – other device	Radio on a TV set; Radio live or on-demand on a computer, mobile phone or hand-held device
	Other audio	Streamed music, streamed podcasts, downloaded music or other audio, music or other audio on a stereo or music centre or portable devices.
Voice communications		Making or receiving phone calls on a landline; Making or receiving phone calls on a mobile phone; Making or receiving phone calls or video calls on a computer.
Text communications		E-mailing, social networking or instant messaging on a computer or mobile phone and texting or video messaging on a mobile phone; newspapers, magazines or books.
Games		Playing games on a TV set, computer or portable device (e.g. hand-held games console or MP3 player .
Other	Other internet	Internet activity on a computer or mobile phone that is not covered by the previous categories.
	Other media	All other media and communications activity on a hand-held device, and all other non-internet activity on a computer or mobile phone.

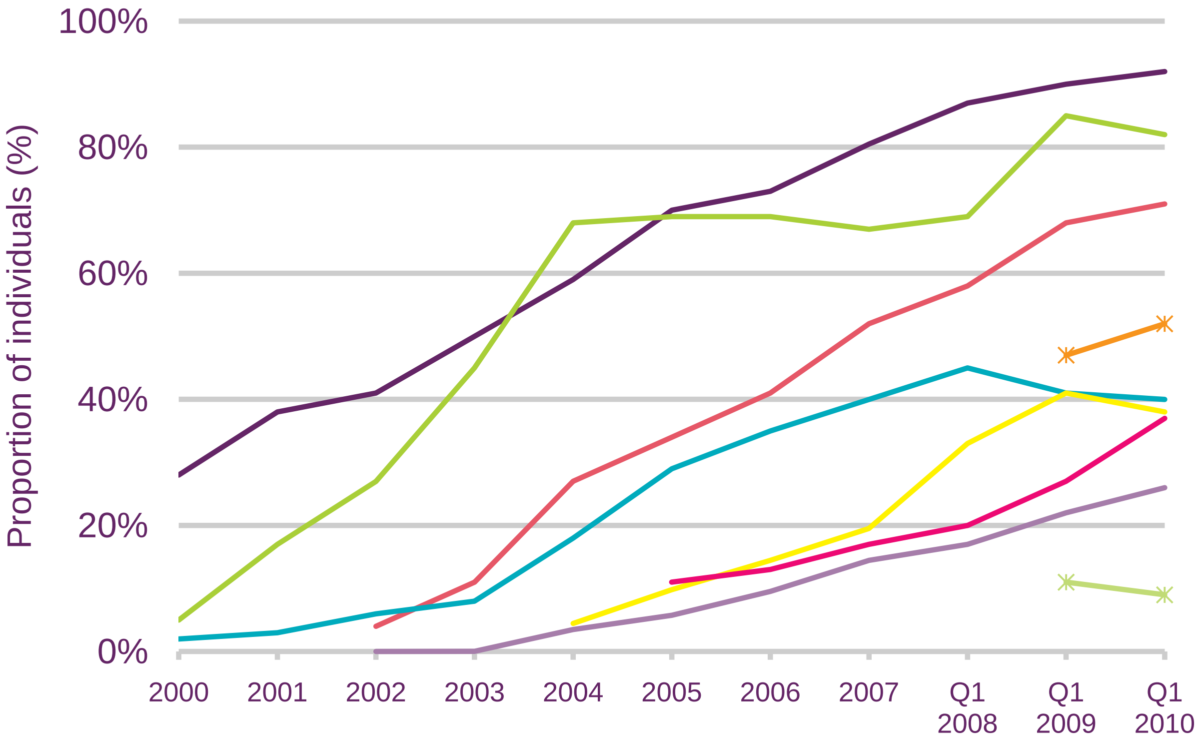
Figure 1.10

Terminology used in this section

Definition	Description
Simultaneous media consumption	Media consumed while doing another media activity at the same time, e.g. texting and watching television.
Solus media consumption	Media consumed while doing no other media activity.
Weekly reach	The proportion of individuals consuming each media within the week.
Daily reach	The proportion of individuals consuming media on a typical day.
Volume	Average minutes consumed per day.
Attention	The average score or the claimed attention by activity for all activities recorded in the diary (on a scale of 1 to 5).
Importance	The average score of claimed importance overall for each activity (on a scale of 1 to 10).

Figure 1.11

Take-up of a range of communications devices and services

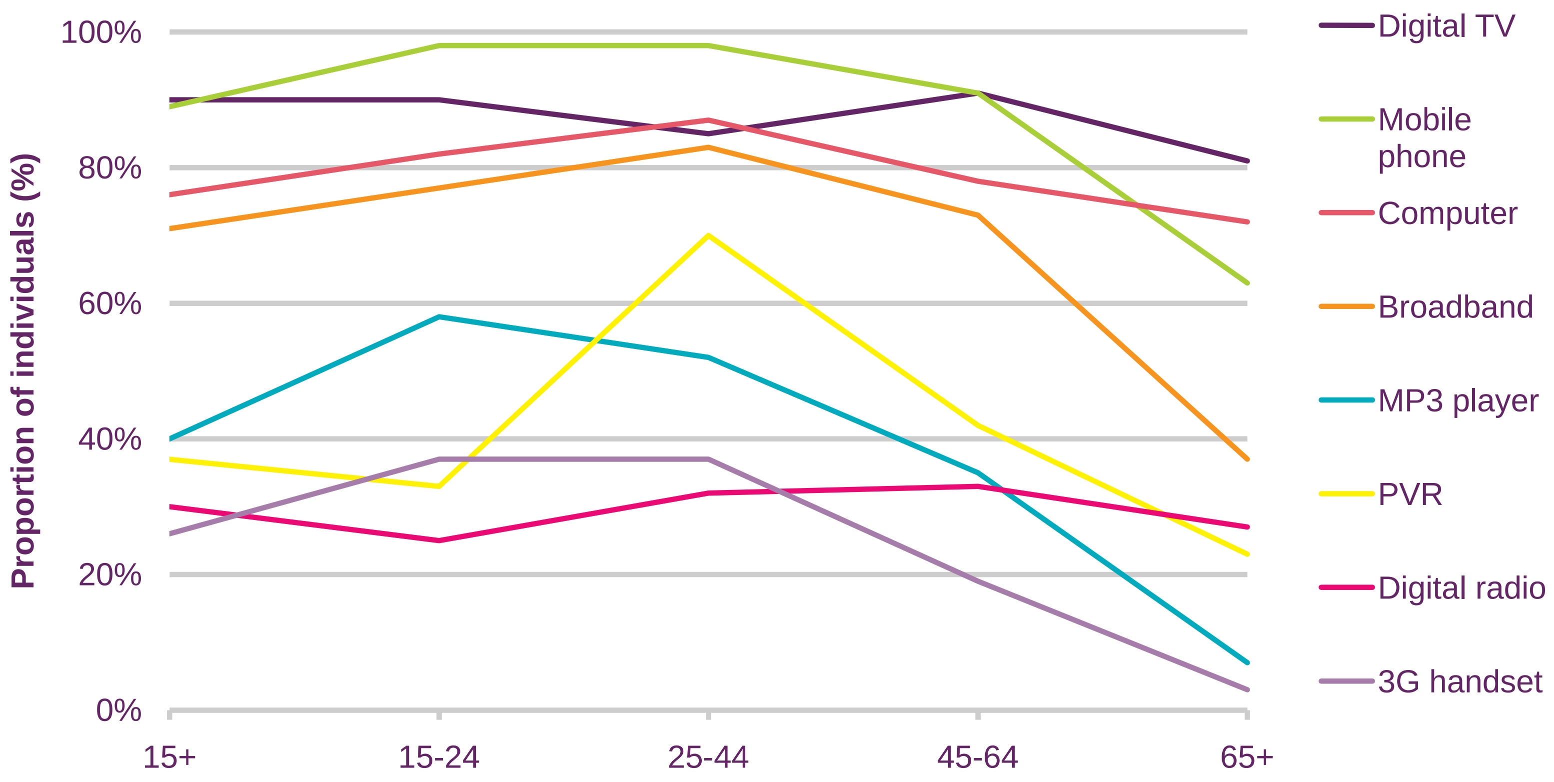


CAGR (%) 1 yr	CAGR (%) 3 yr	
3.4	7.2	Digital television
23.2	7.2	DVD player
17	18	Broadband
n/a	n/a	Games console
-8.9	5.4	MP3 player
24.2	43.1	DAB digital radio
35.0	27.6	PVR
29.4	30.1	3G handset
n/a	n/a	Blu-Ray/ HD-DVD

Source: Ofcom research.
Note: The Question wording for DVD Player and DVR was changed in Q1 2009 so data is not directly comparable with previous years.

Figure 1.12

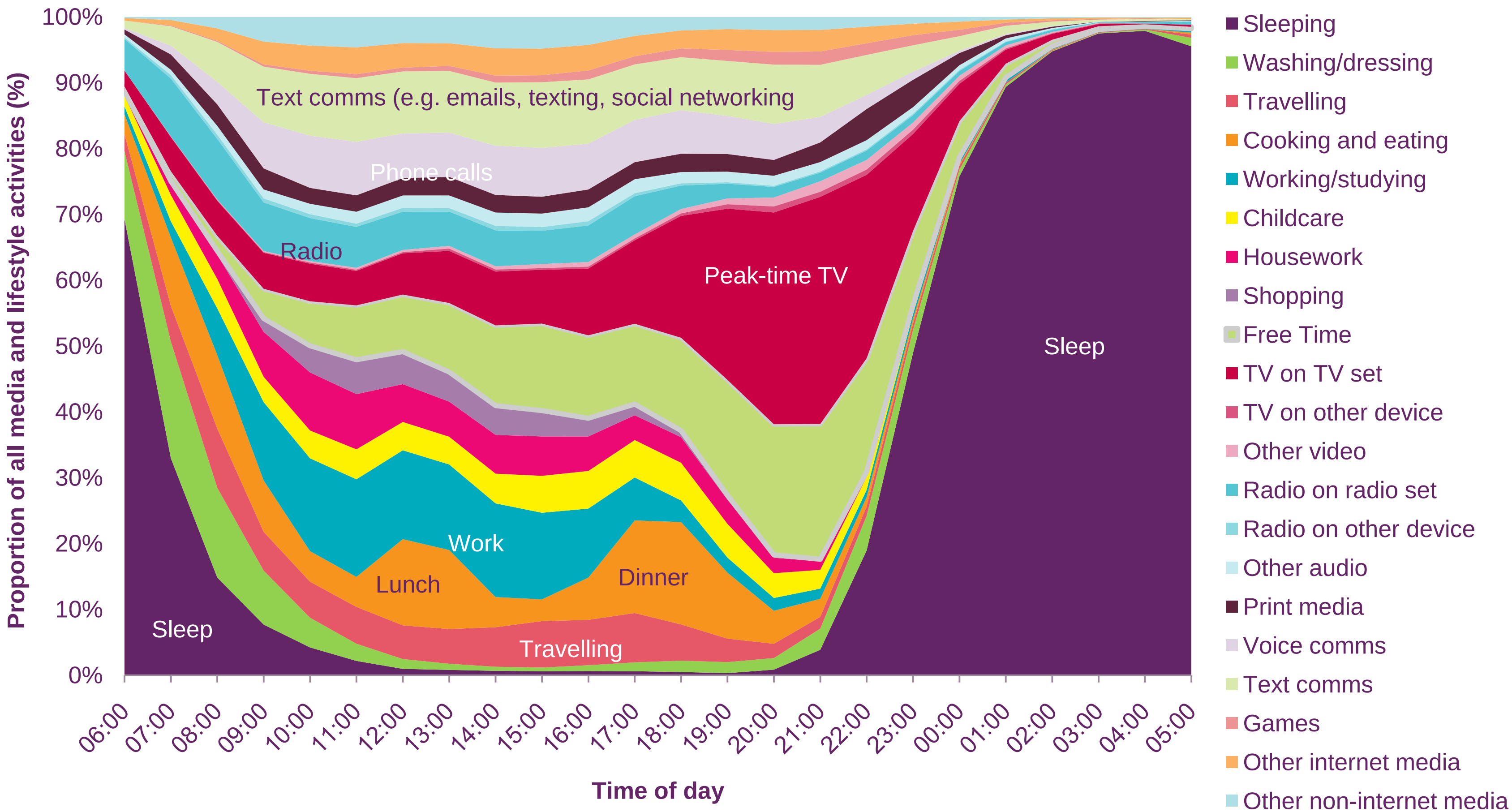
Adoption of new technologies, by age



Source: Ofcom Technology Tracker, Q1 2010, n=9013 15+; 1351 15-24s; 3111 25-44s; 2639 45-64s; 1912 65+

Figure 1.13

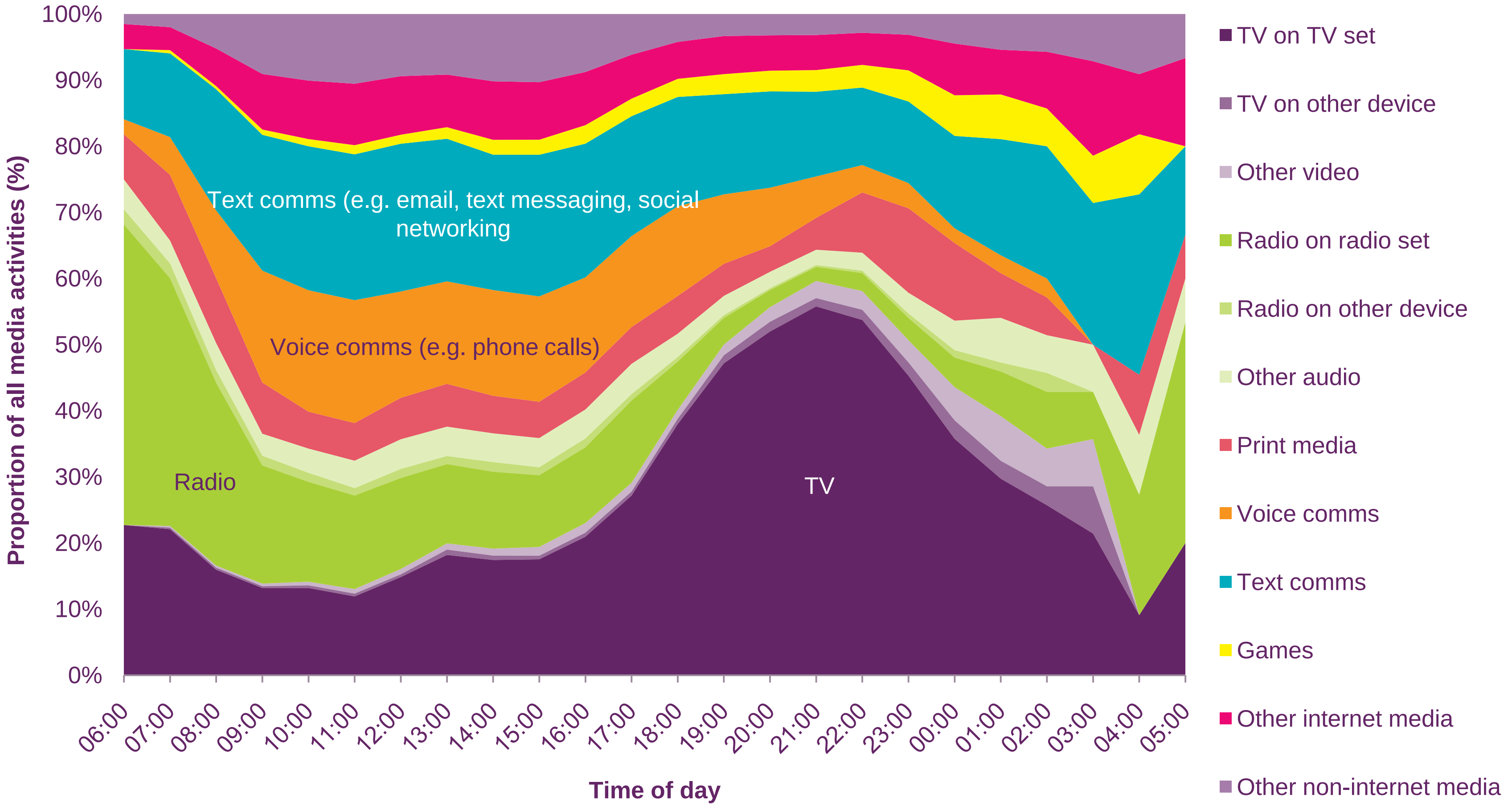
Proportion of all lifestyle and media activity throughout the day



Source: Ofcom research, base = all respondent days: 7966

Figure 1.14

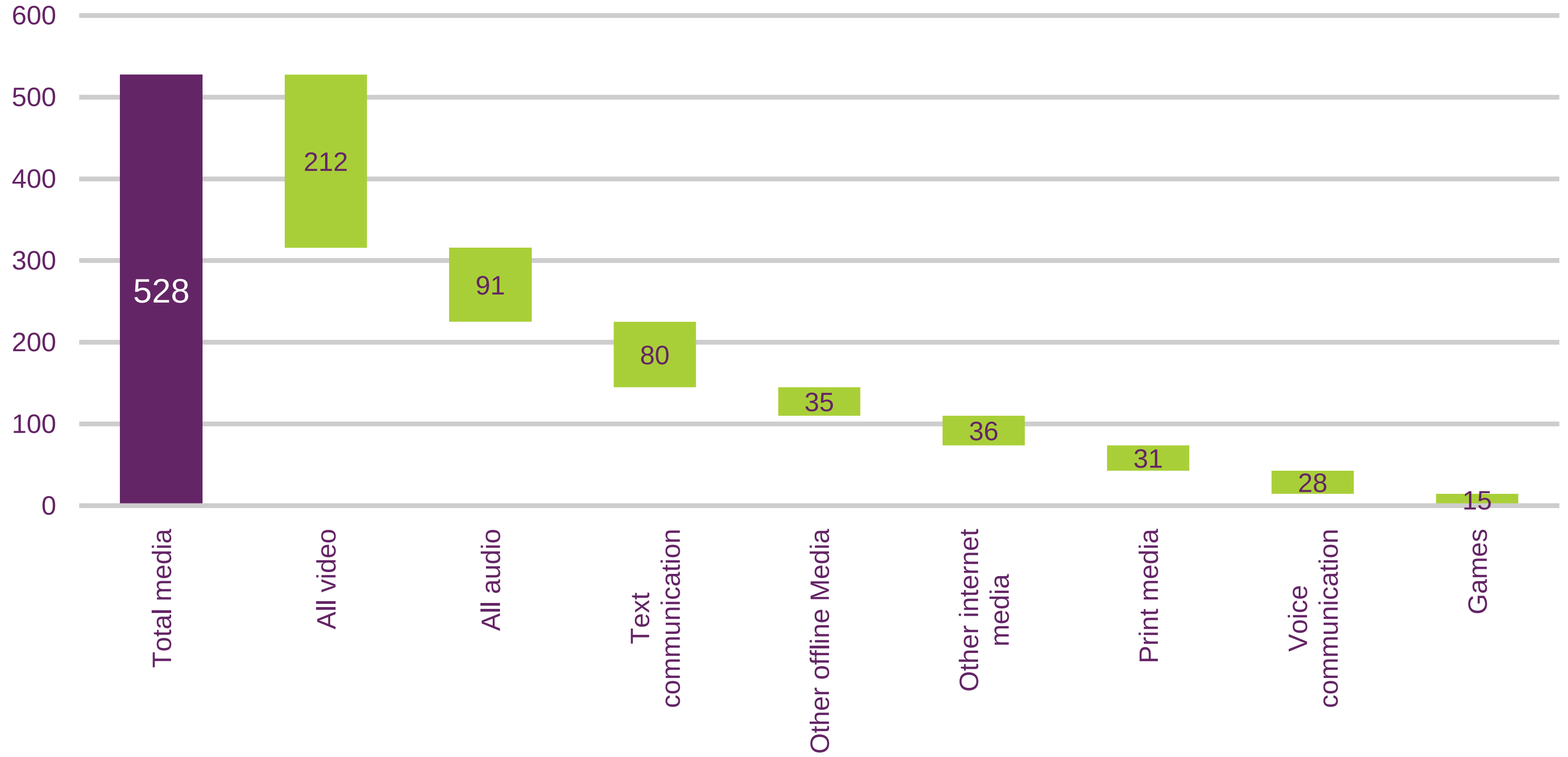
Proportion of all media activity throughout the day



Source: Ofcom research, base = all respondent days: 7966

Fig 1.15

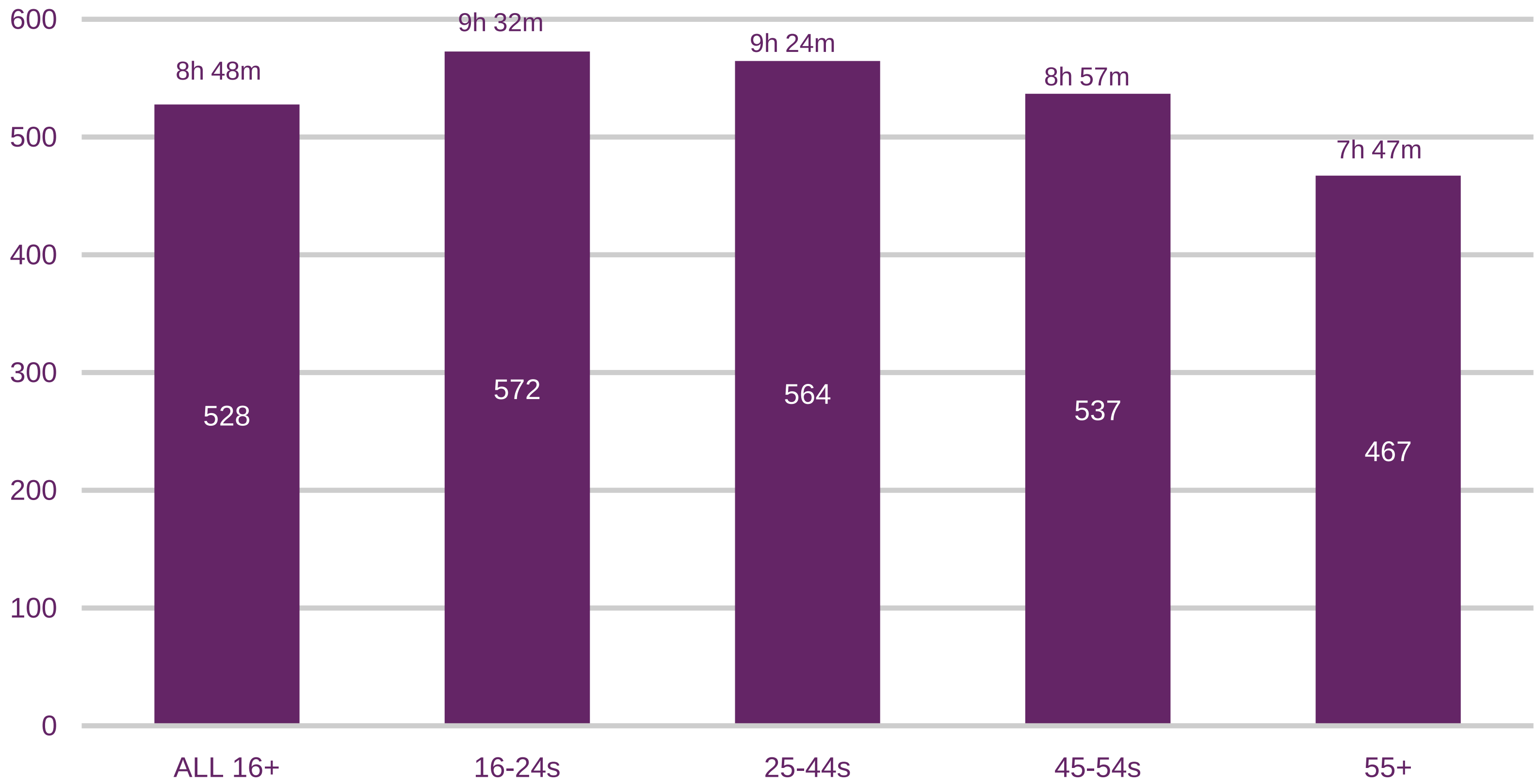
Average amount of media used per day



Source: Ofcom research, base = all respondent days: 7966

Figure 1.16

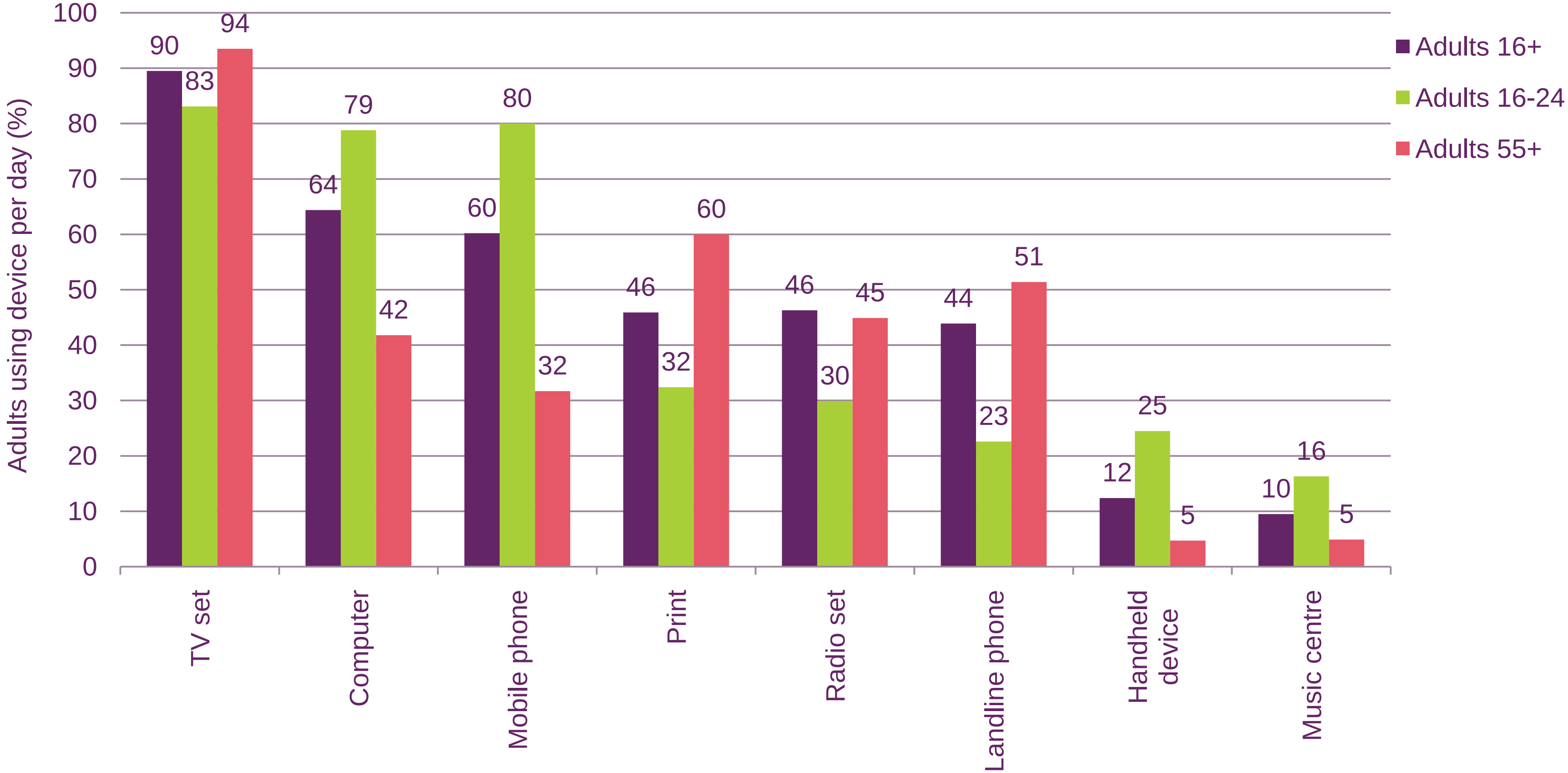
Average amount of media used per day, by age



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.18

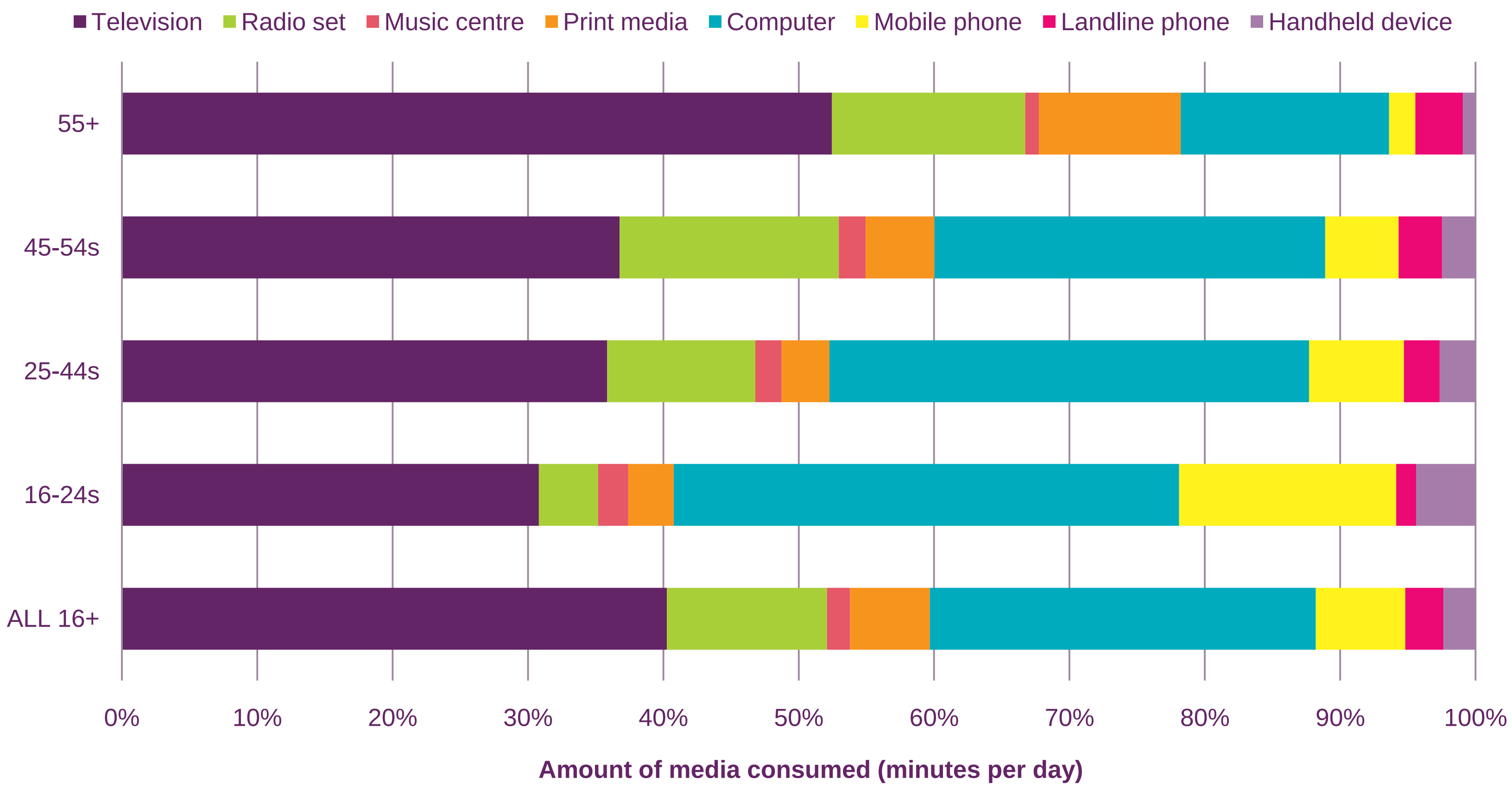
Daily reach of devices – adults 16+, 16-24, and 55+



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 55+ = 2373

Figure 1.19

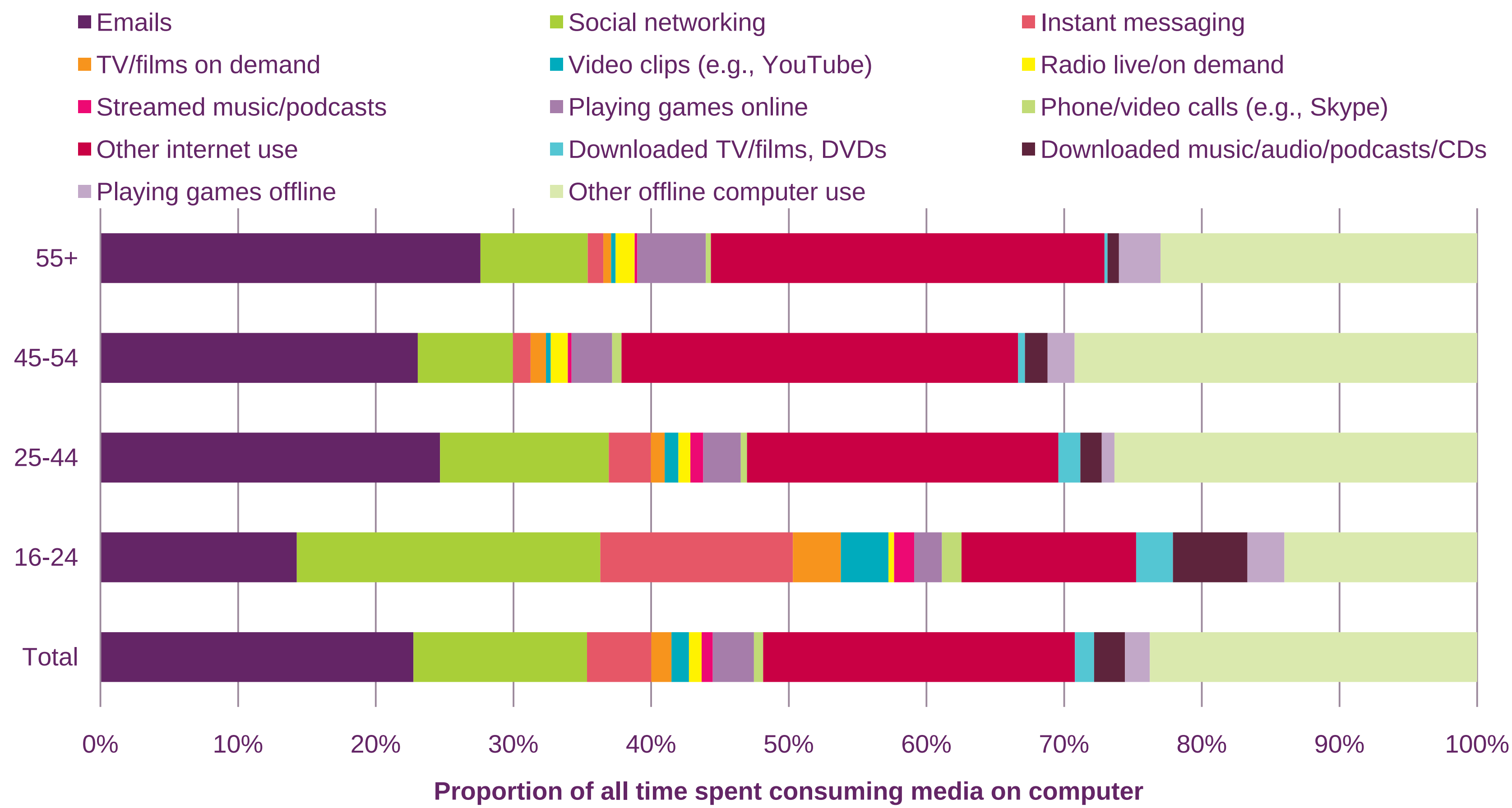
Proportion of all media use through each device, by age group



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.21

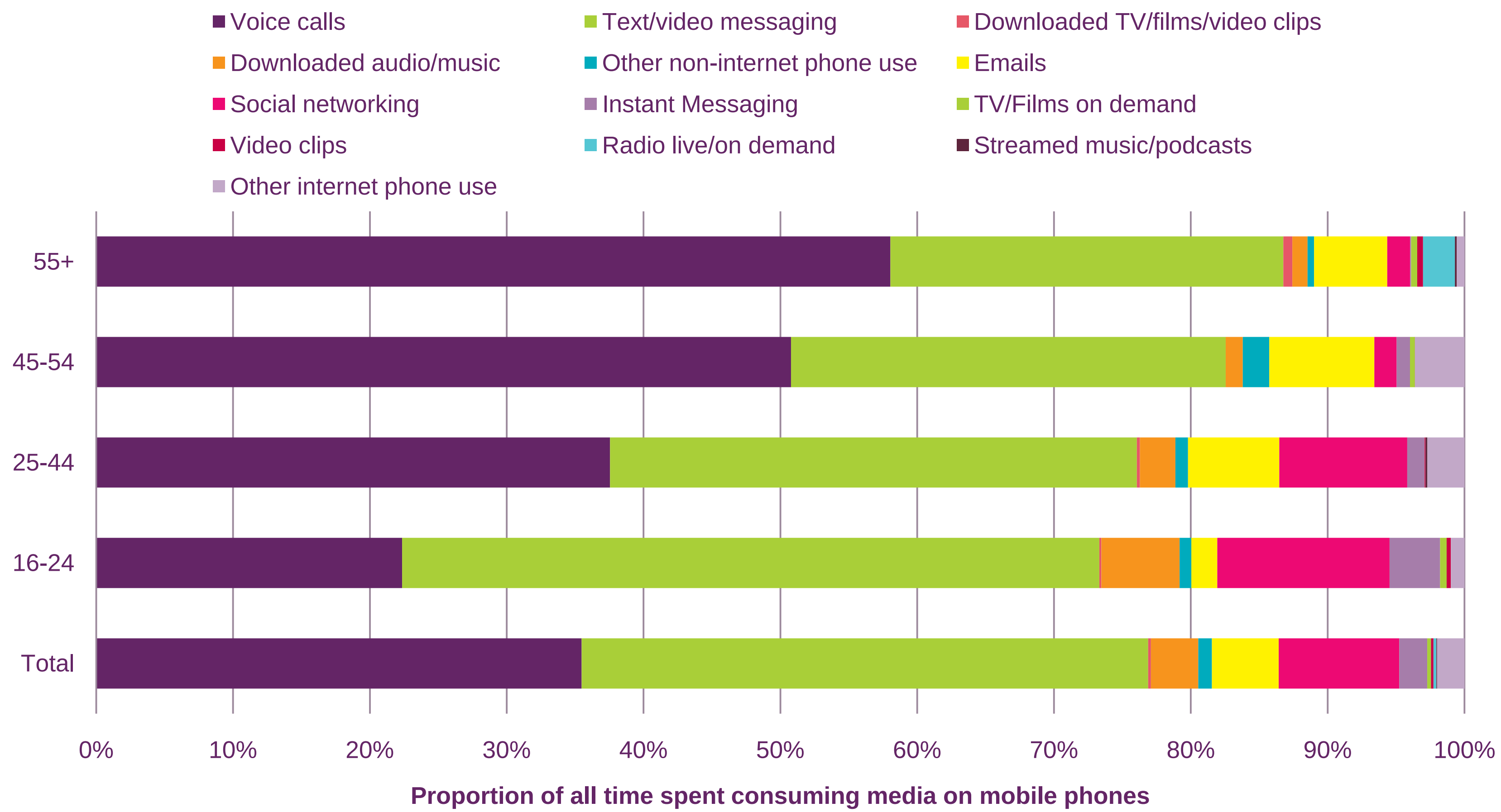
Proportion of computer use, by activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.22

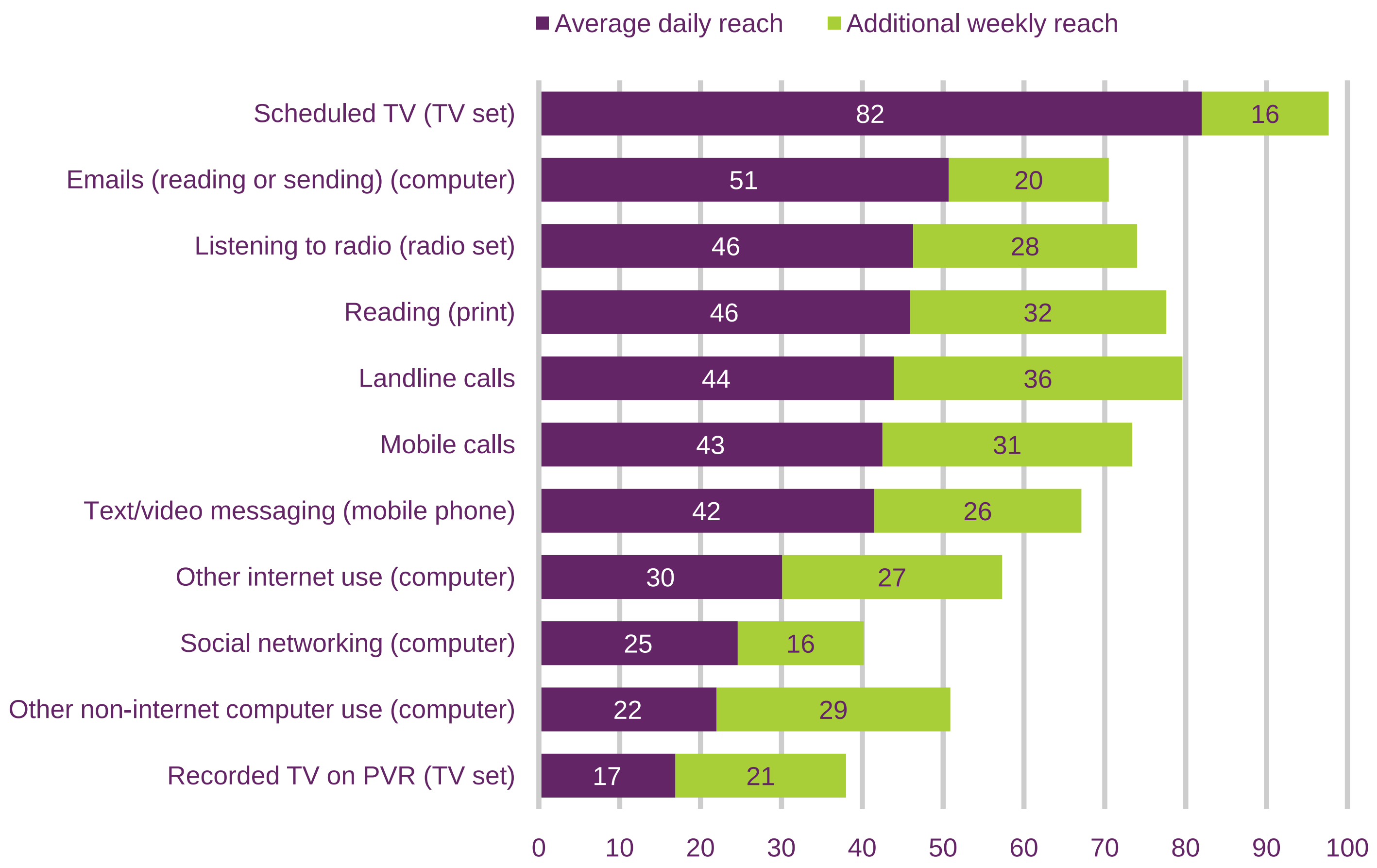
Proportion of mobile phone use, by activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.23

Media activities with the highest daily reach



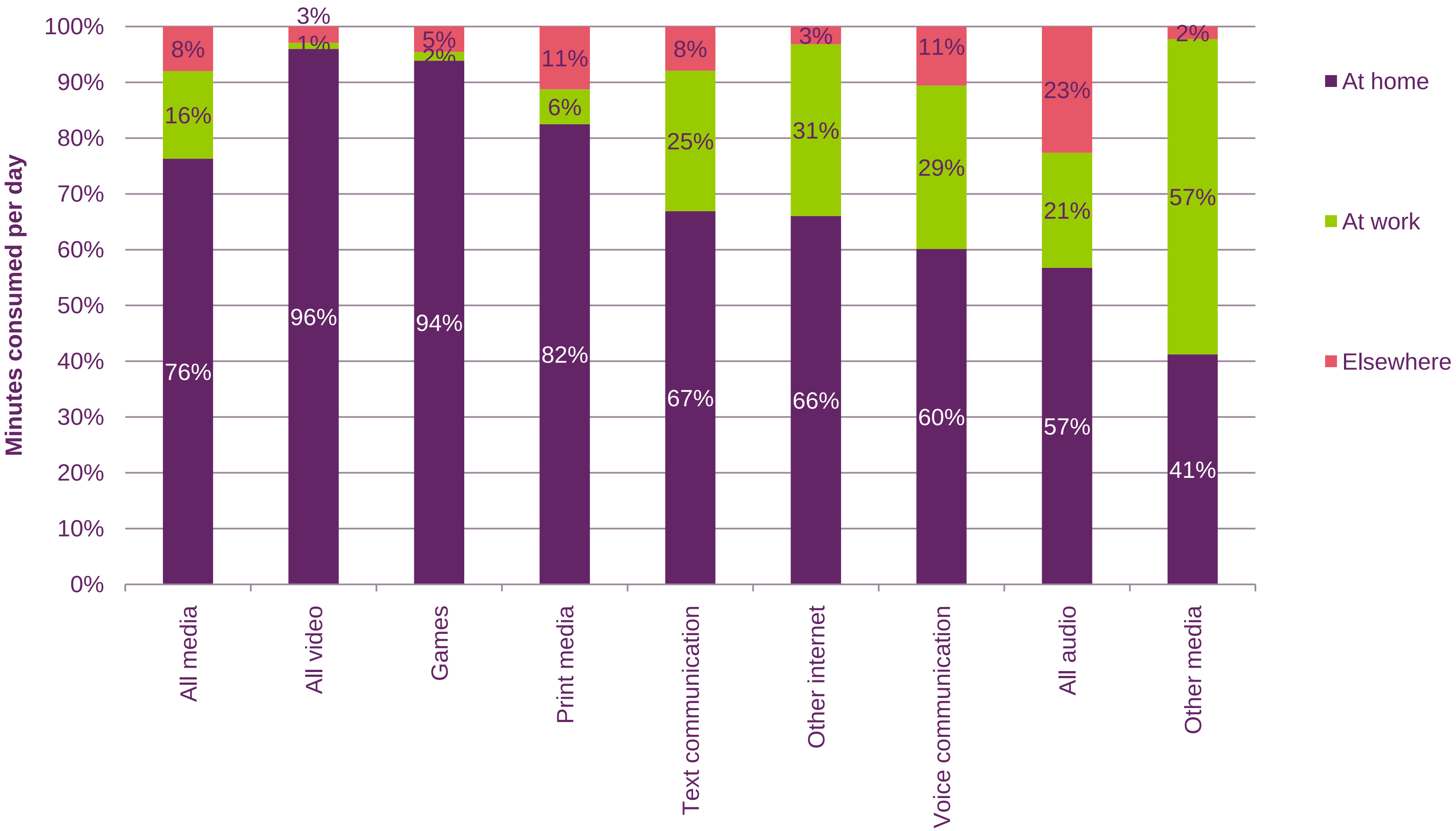
Source: Ofcom research, base = All respondent days: 7966

Figure 1.24
Proportion of media used, by age

Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.25

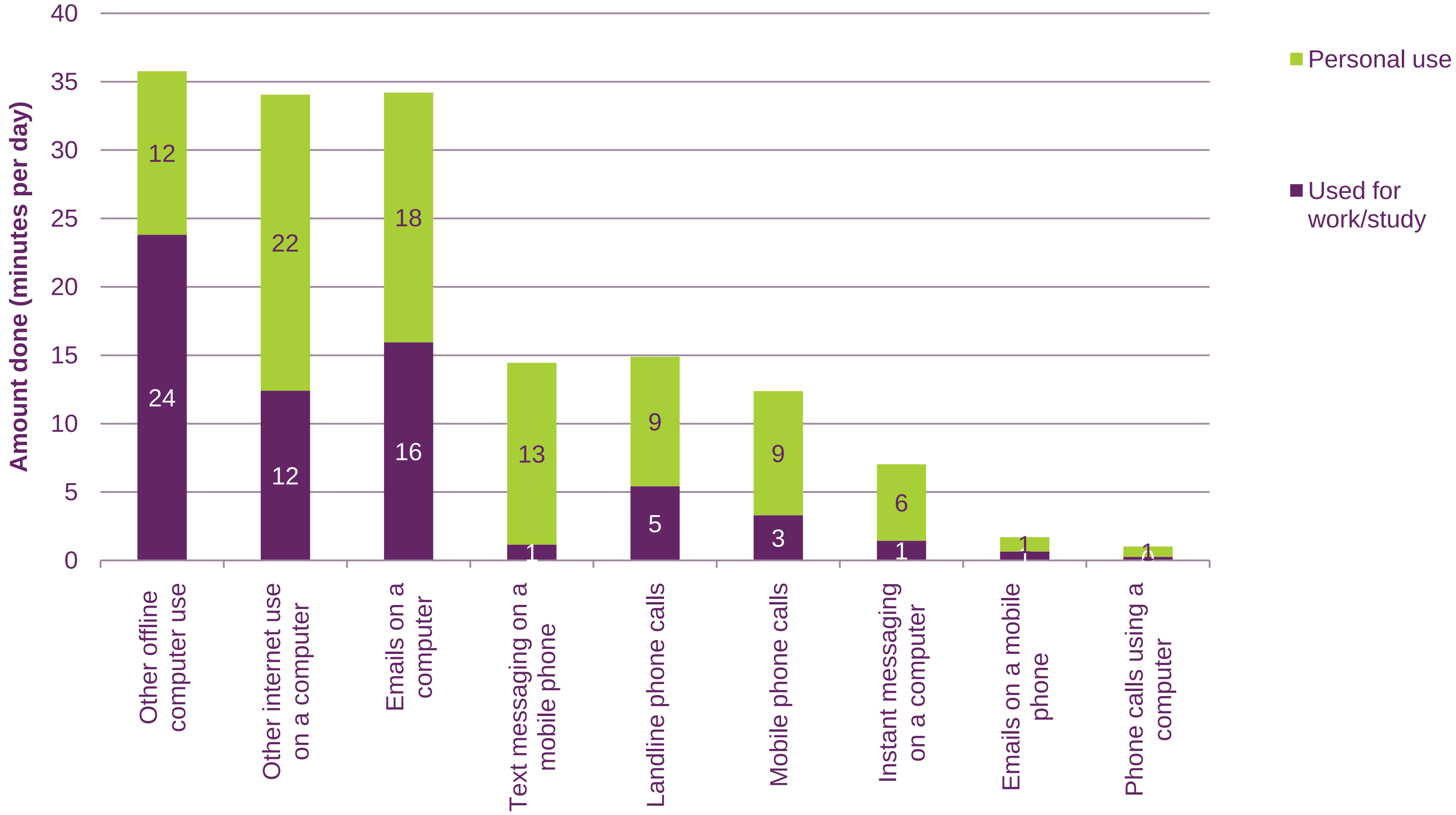
Proportion of media use, by location



Source: Ofcom research, base = All respondent days: 7966

Figure 1.26

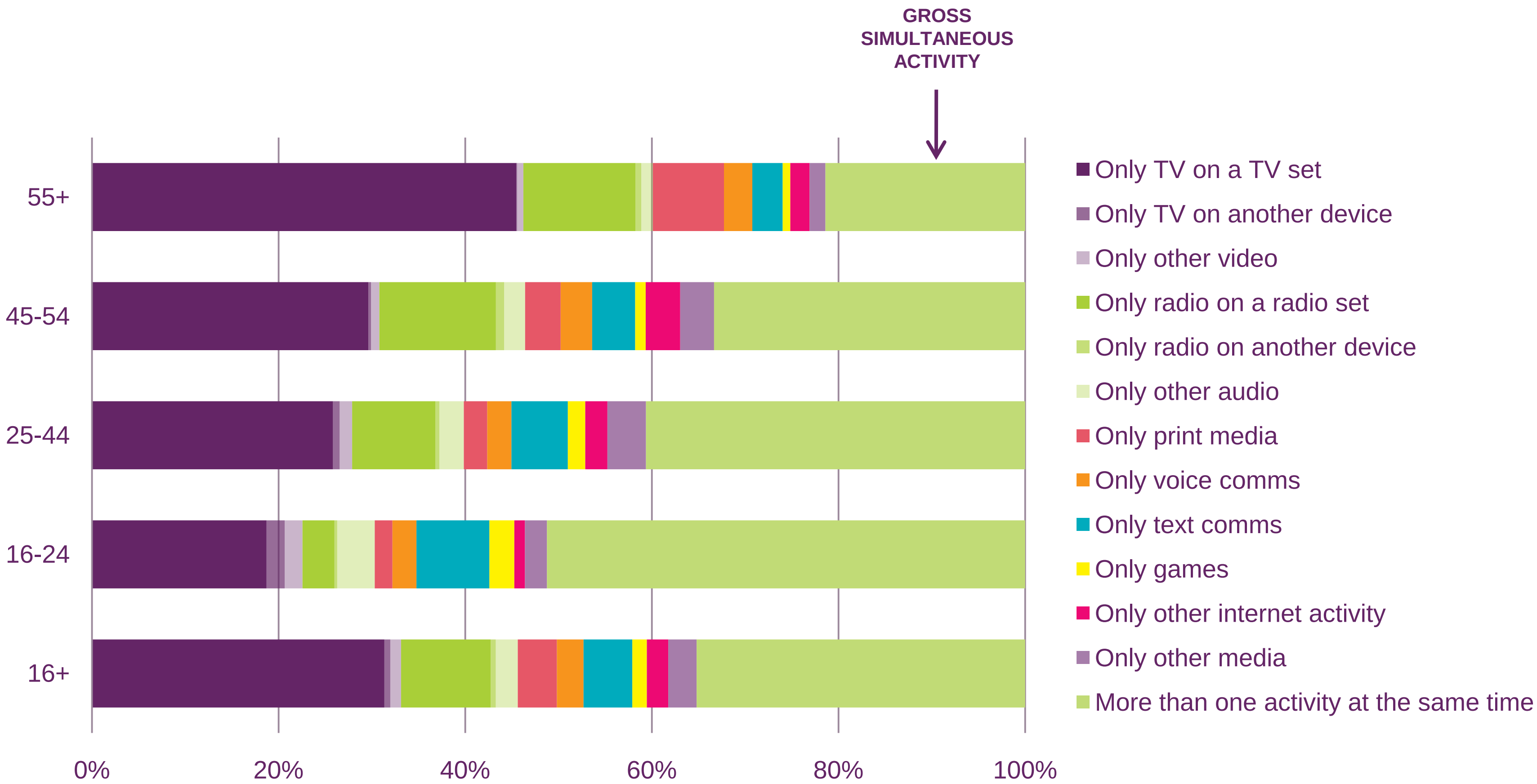
Amount of activity, by purpose



Source: Ofcom research, base = All respondent days: 7966

Figure 1.27

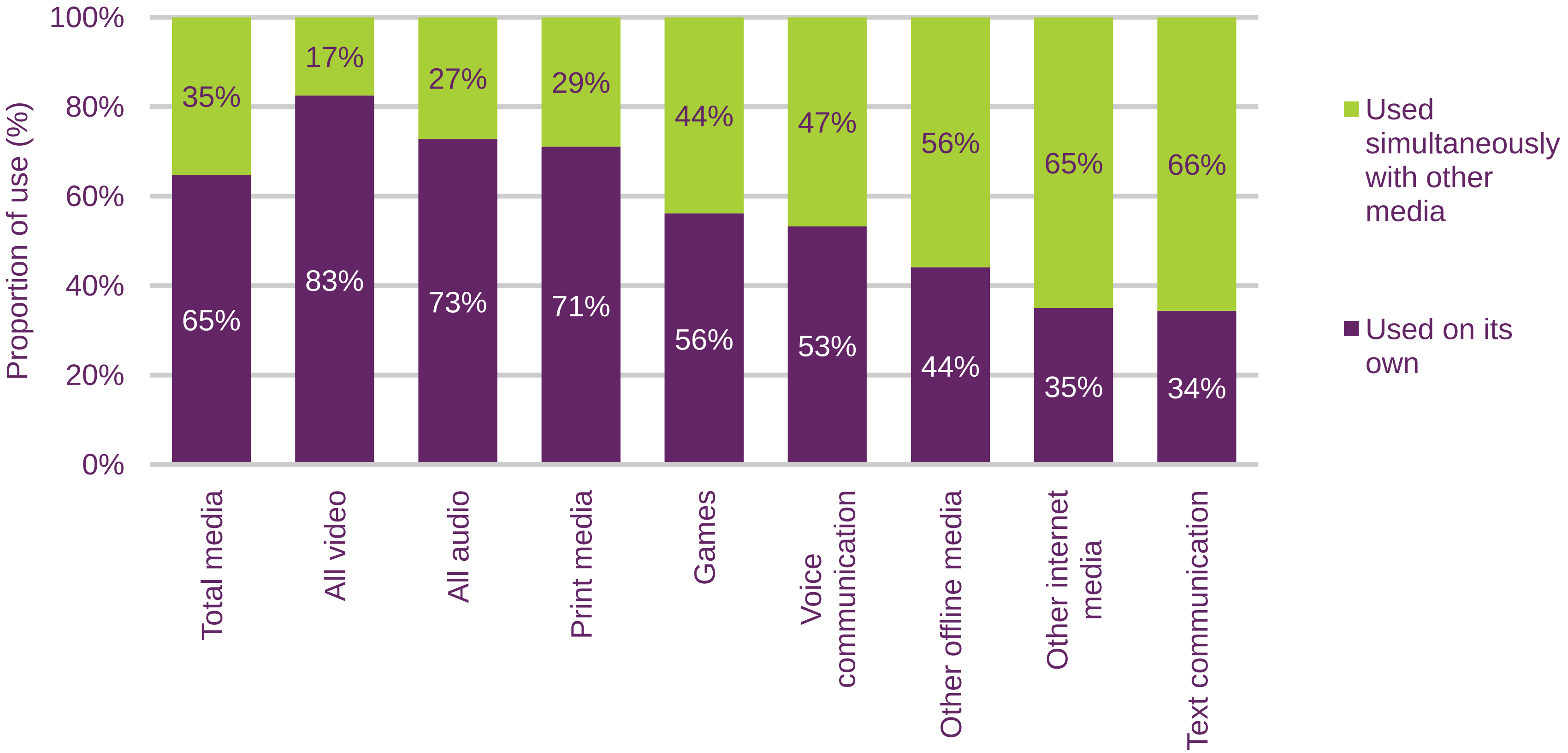
Proportion of all media used, split by individual solus activities and all simultaneous activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.28

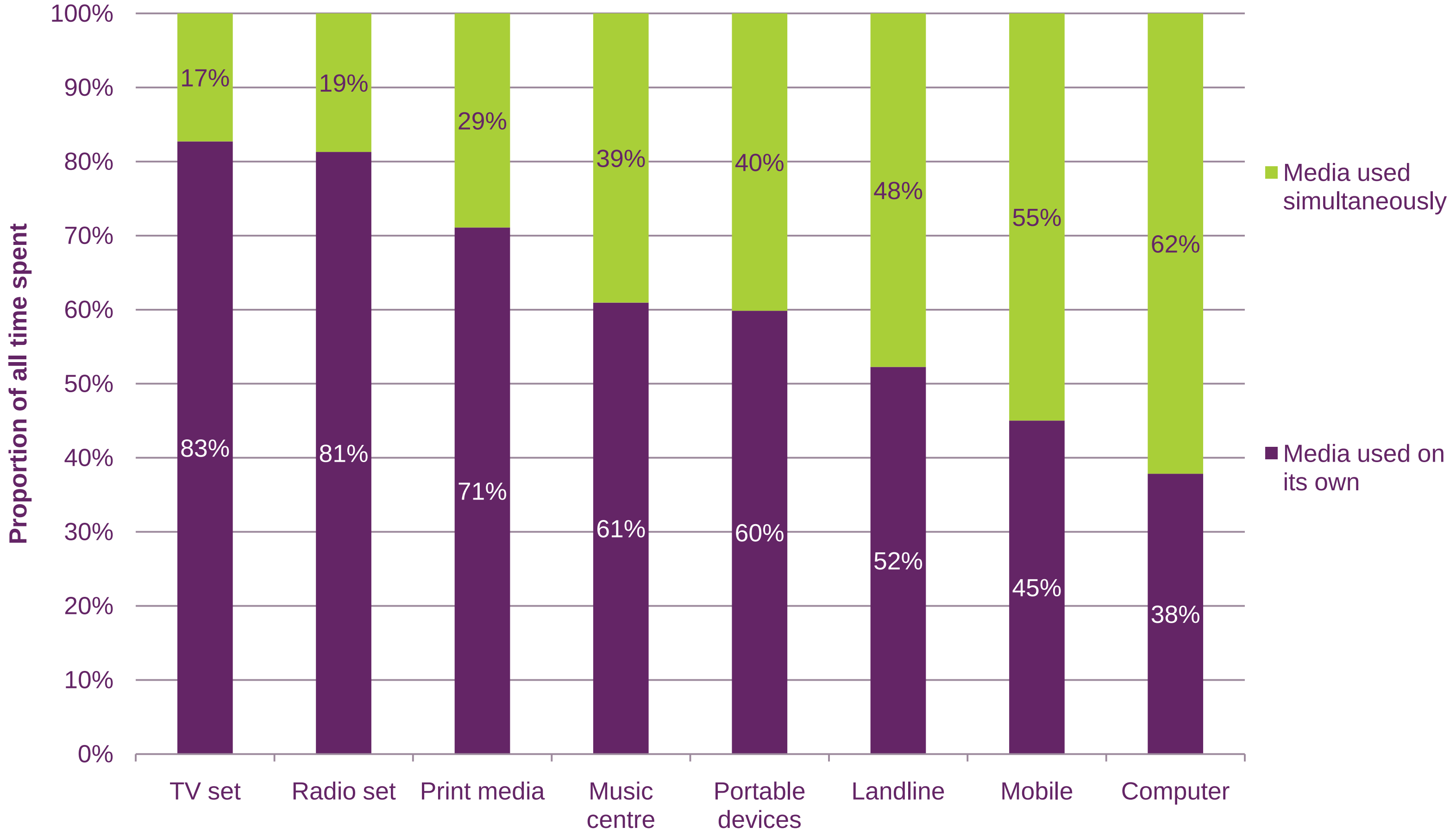
Proportion of media used per category, split by solus and simultaneous use



Source: Ofcom research, base = All respondent days: 7966

Figure 1.29

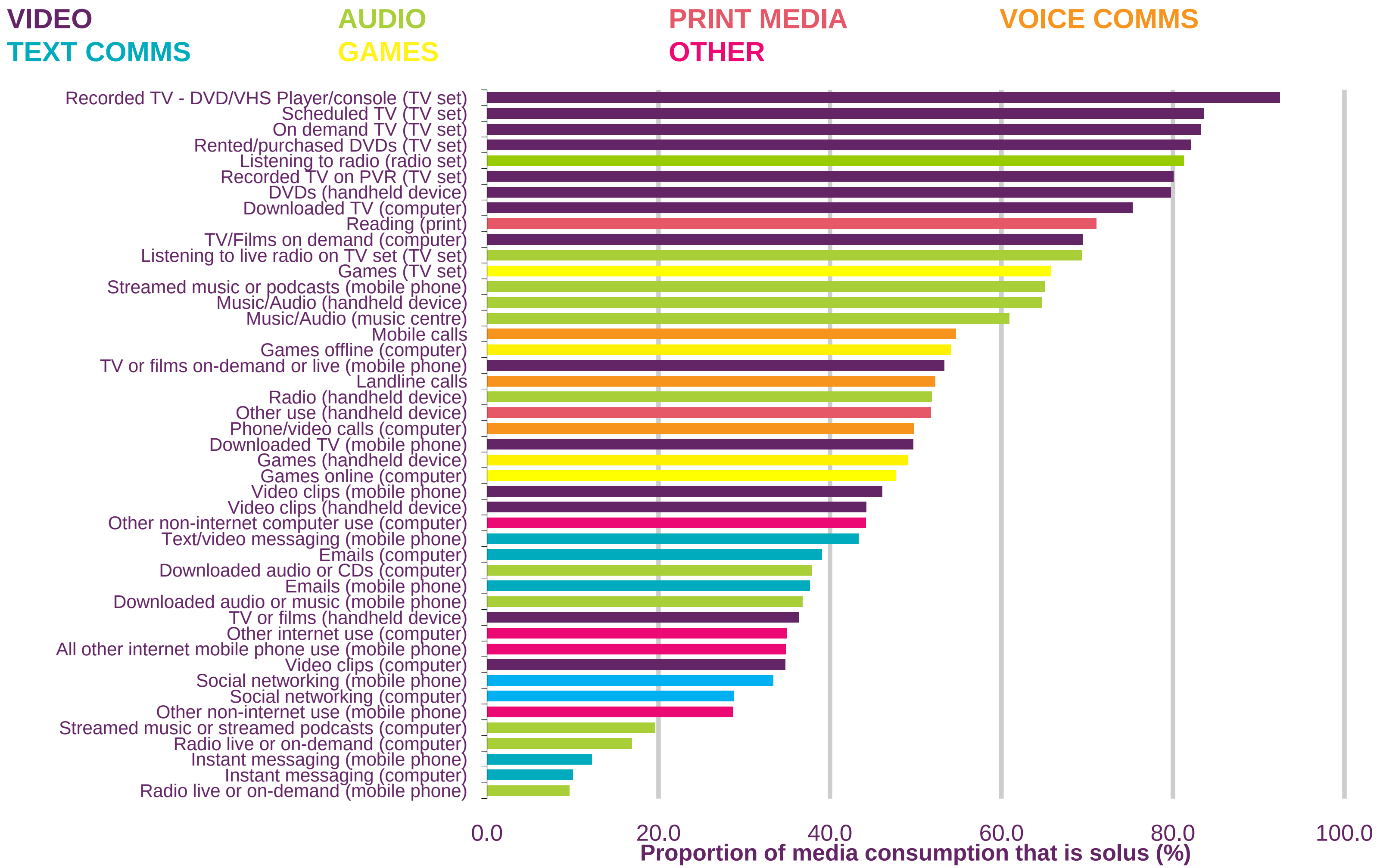
Proportion of solus and simultaneous media used, by device



Source: Ofcom research, base = All respondent days: 7966

Figure 1.30

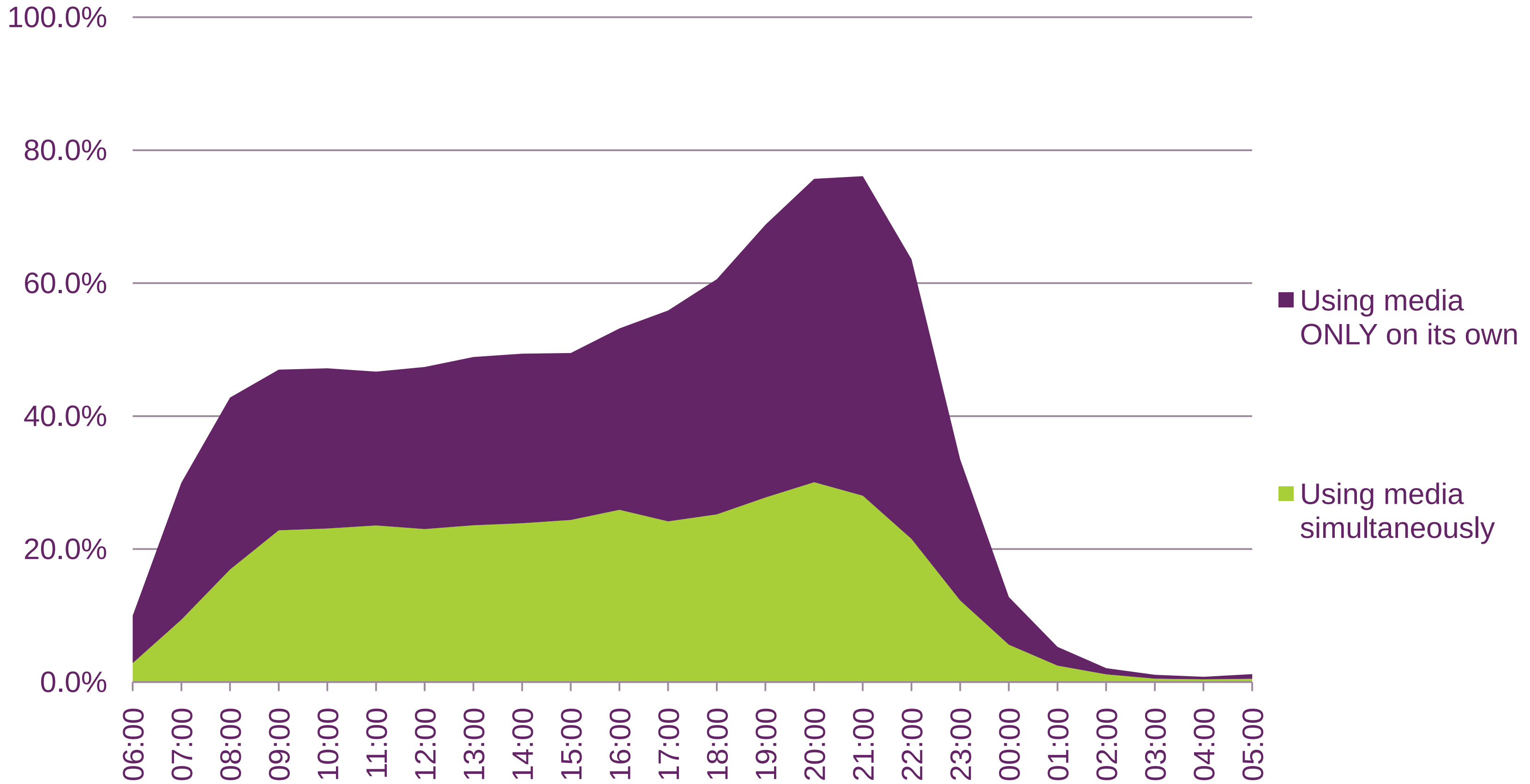
Proportion of specific media activities that is solus



Source: Ofcom research, base = All respondent days: 7966

Figure 1.31

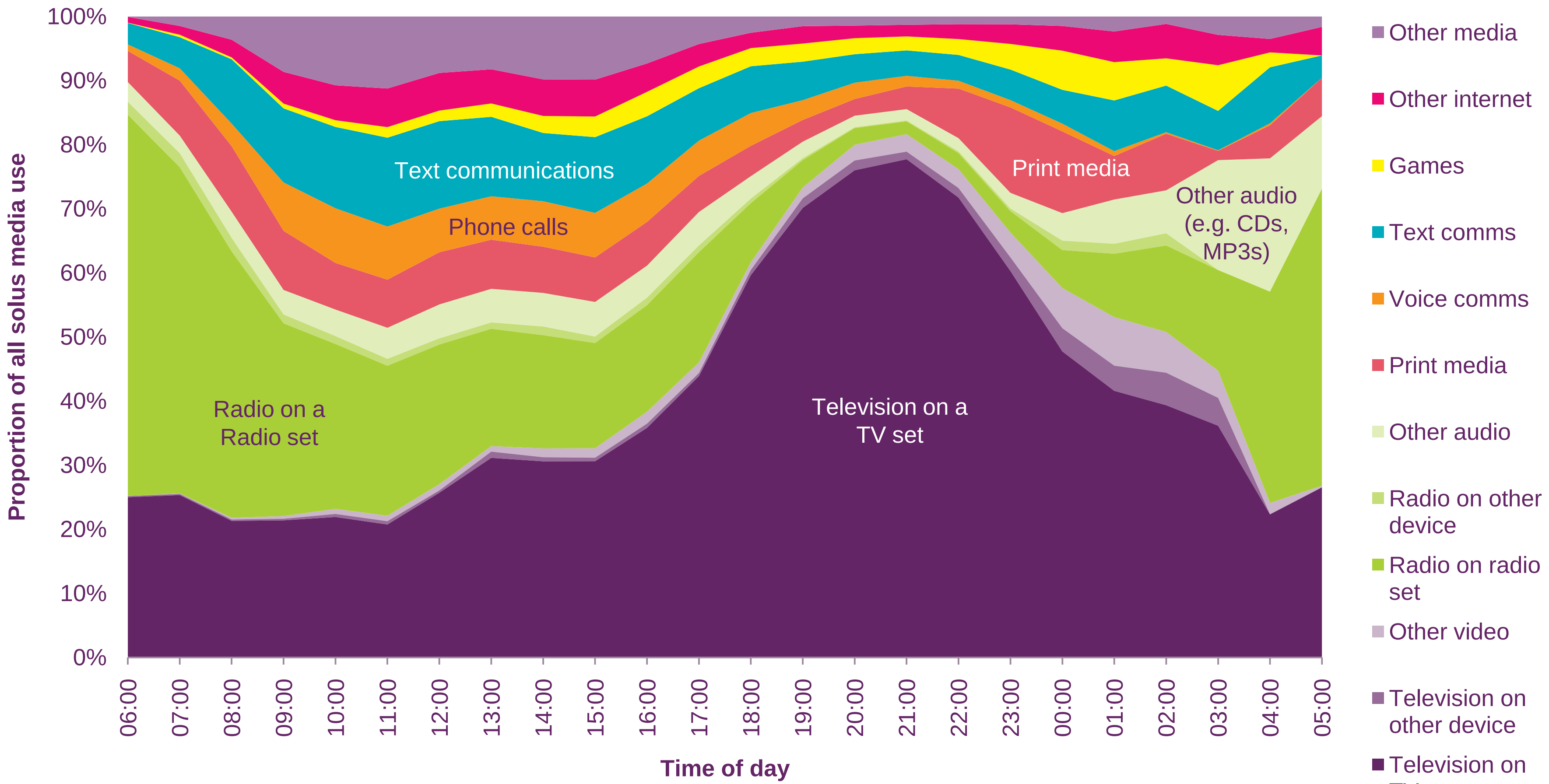
Hourly reach of media use throughout the day, profiled by solus and simultaneous activity



Source: Ofcom research, base = All respondent days: 7966

Figure 1.32

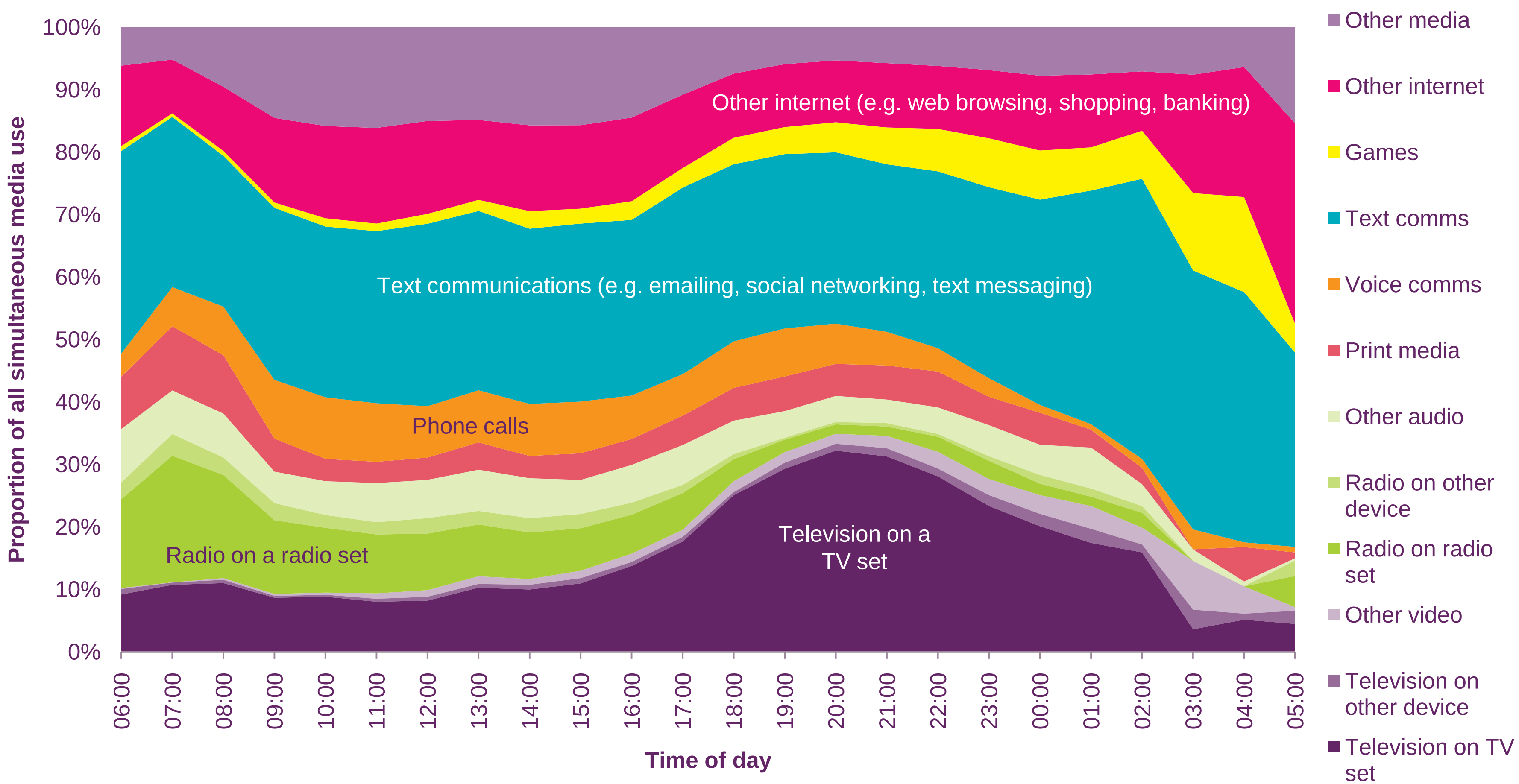
Proportion of solus media use throughout the day



Source: Ofcom research, base = All respondent days: 7966

Figure 1.33

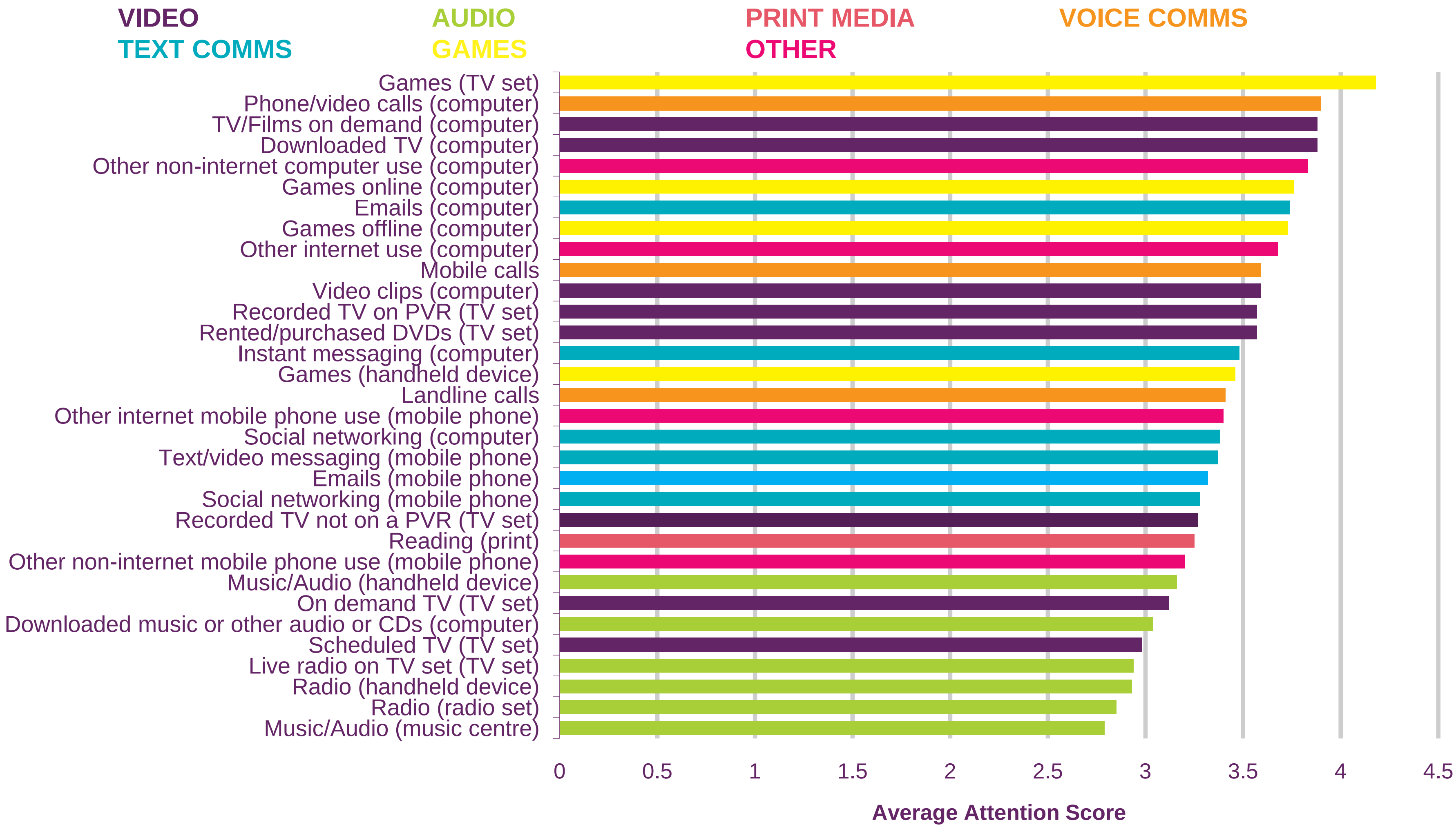
Proportion of simultaneous media use throughout the day



Source: Ofcom research, base = All respondent days: 7966

Figure 1.34

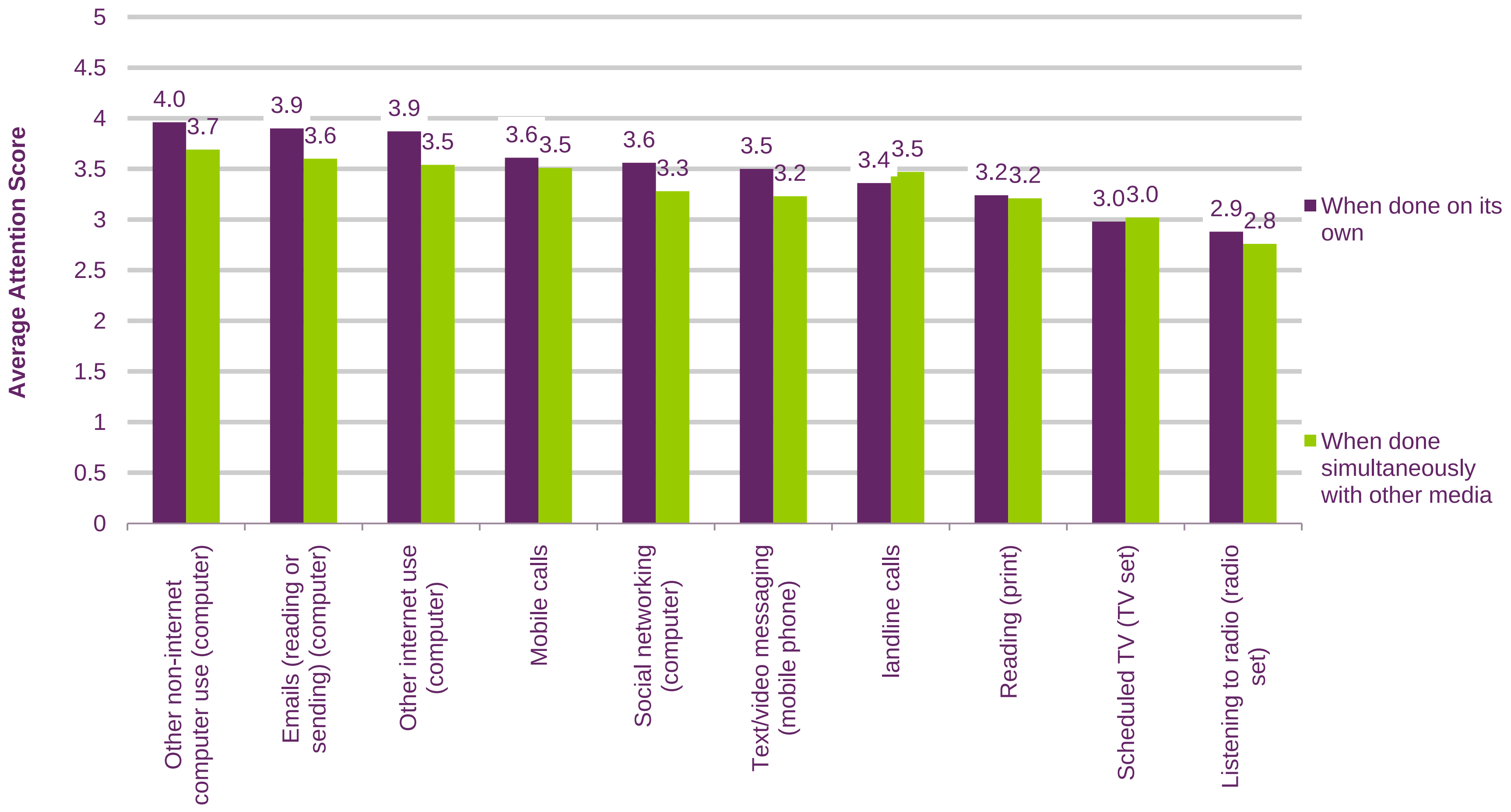
Attention level by activity, based on mean scores



Source: Ofcom research, base = All respondent days: 7966

Figure 1.35

Solus and simultaneous attention scores, by activity

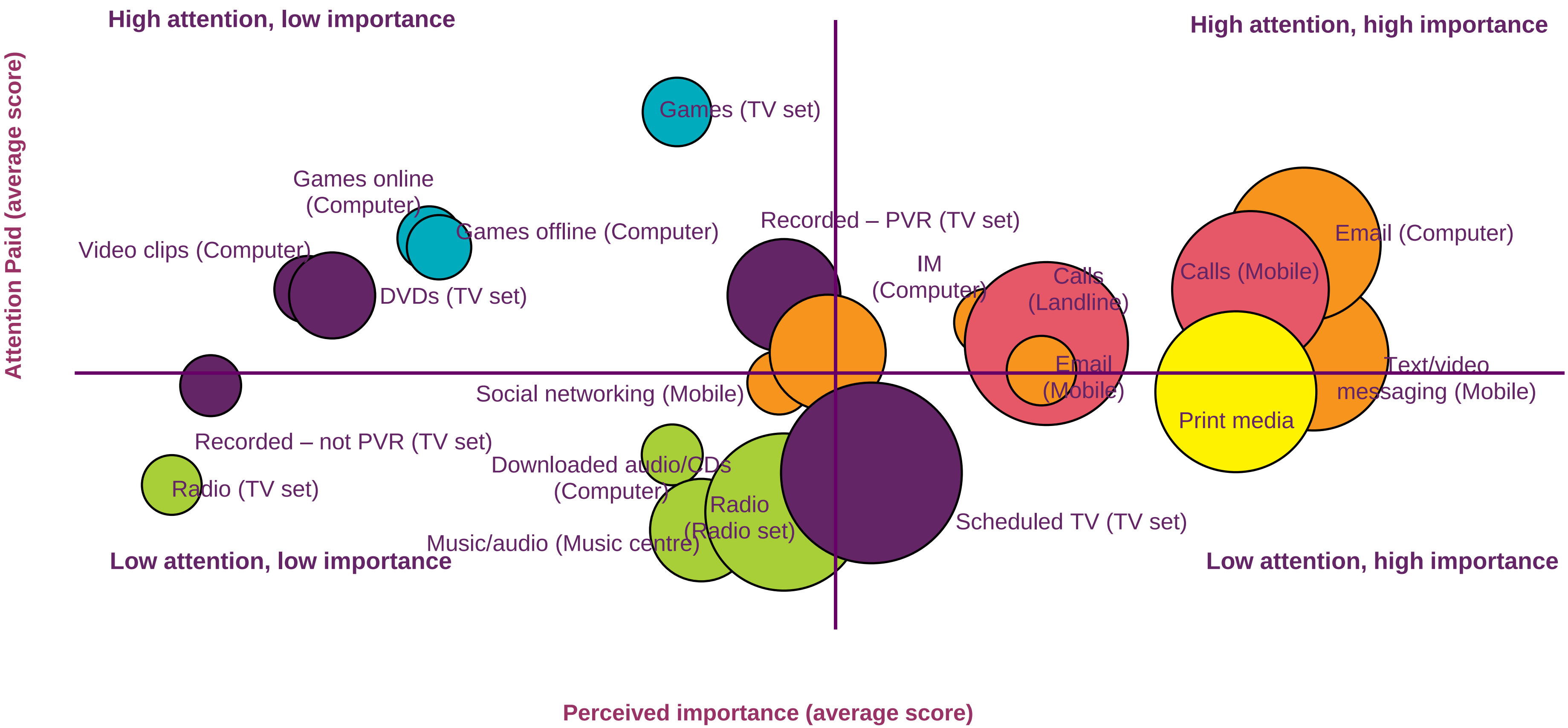


Source: Ofcom research, base = All respondent days: 7966

Source: Ofcom attitudinal research, activities with base>50 respondents; base: all who ever do activity and have undertaken it in week of research.

Figure 1.37

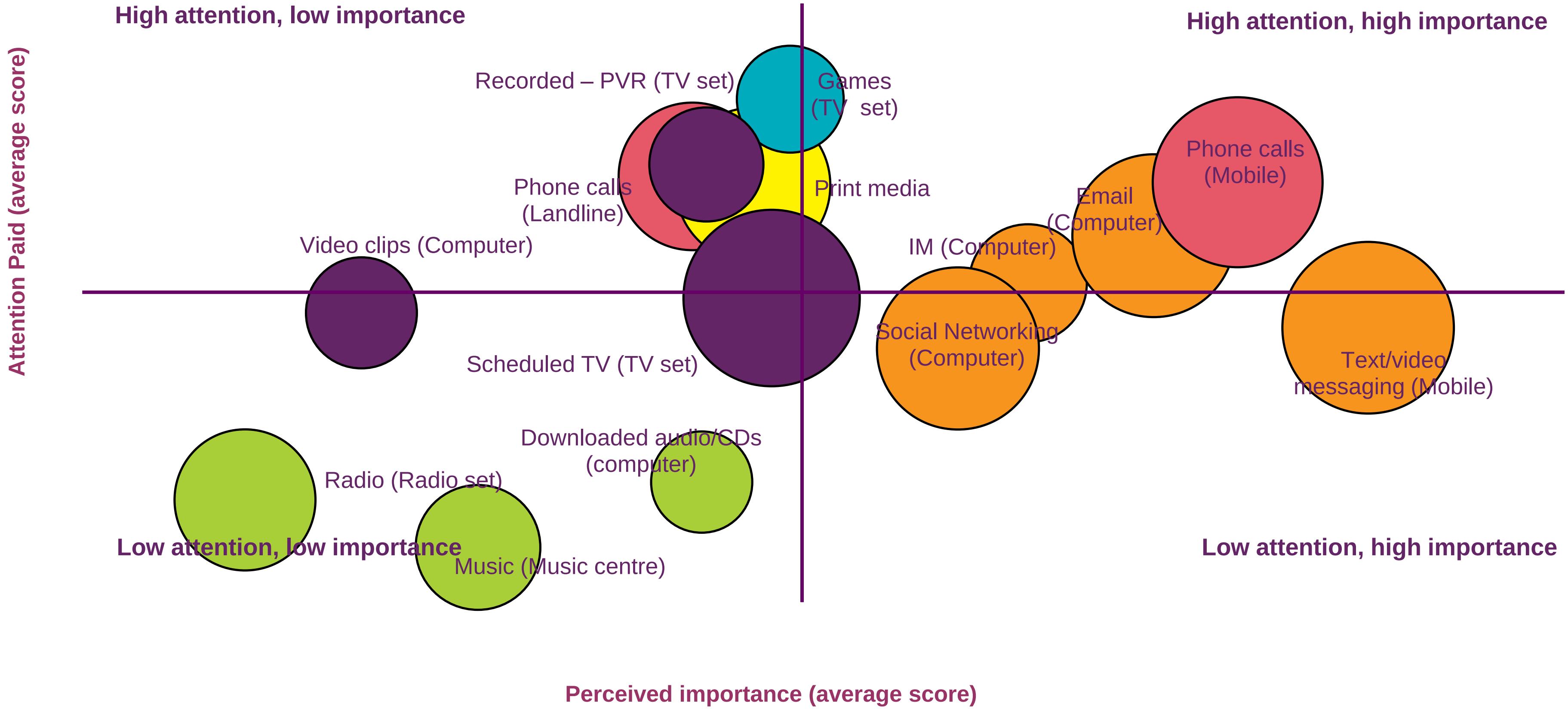
Importance and attention of activities – based on mean scores



Source: Ofcom research, base = all respondent days: 7966, all activities with base>50 respondent days for attention and base>50 respondents for importance; base: all who ever do activity and have undertaken it in week of research, size of bubble proportional to weekly reach.

Figure 1.38

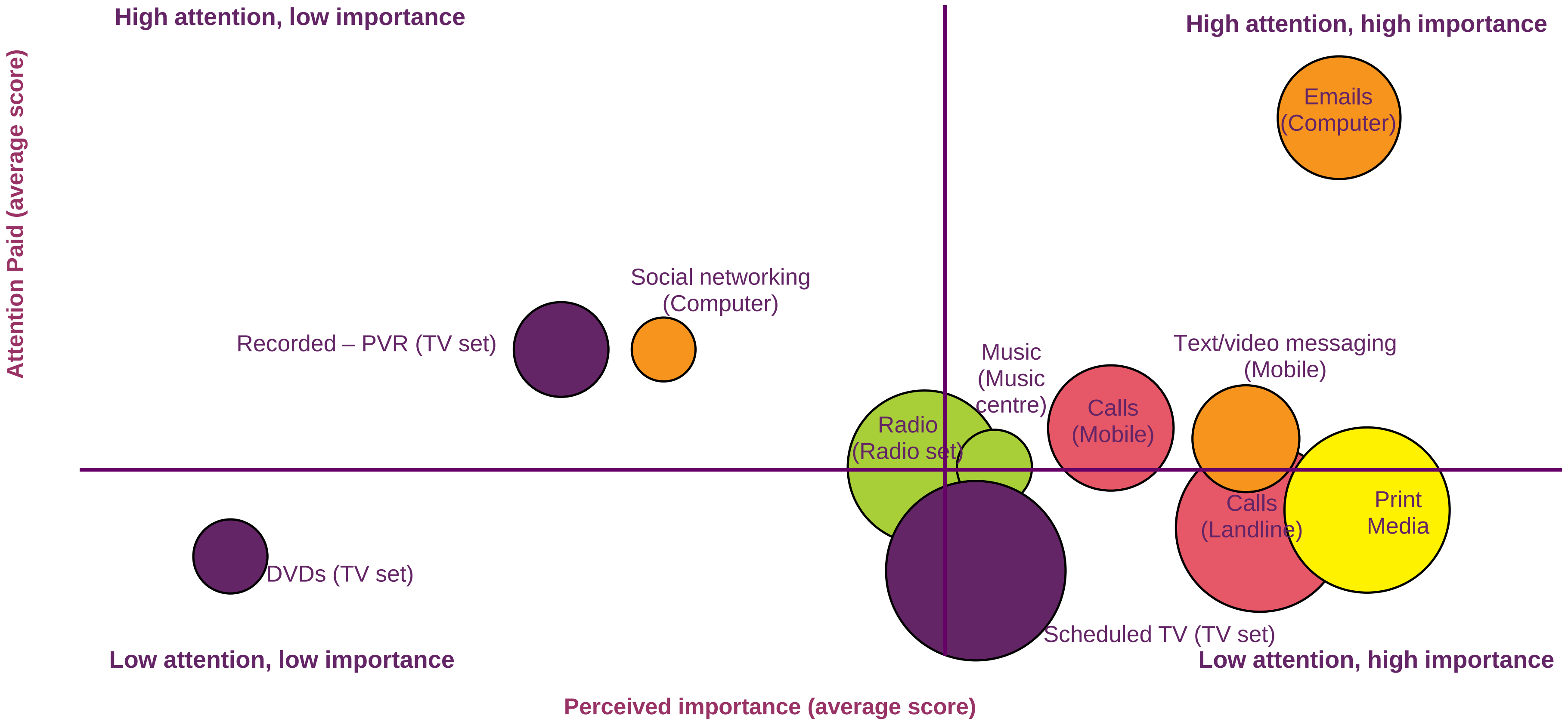
Importance and attention of activities for adults 16-24 – based on mean scores



Source: Ofcom research, base = all 16-24 respondent days: 1106, all activities with base>50 respondent days for attention and base>50 respondents for importance; base: all who ever do activity, and have undertaken it in week of research, size of bubble proportional to weekly reach.

Figure 1.39

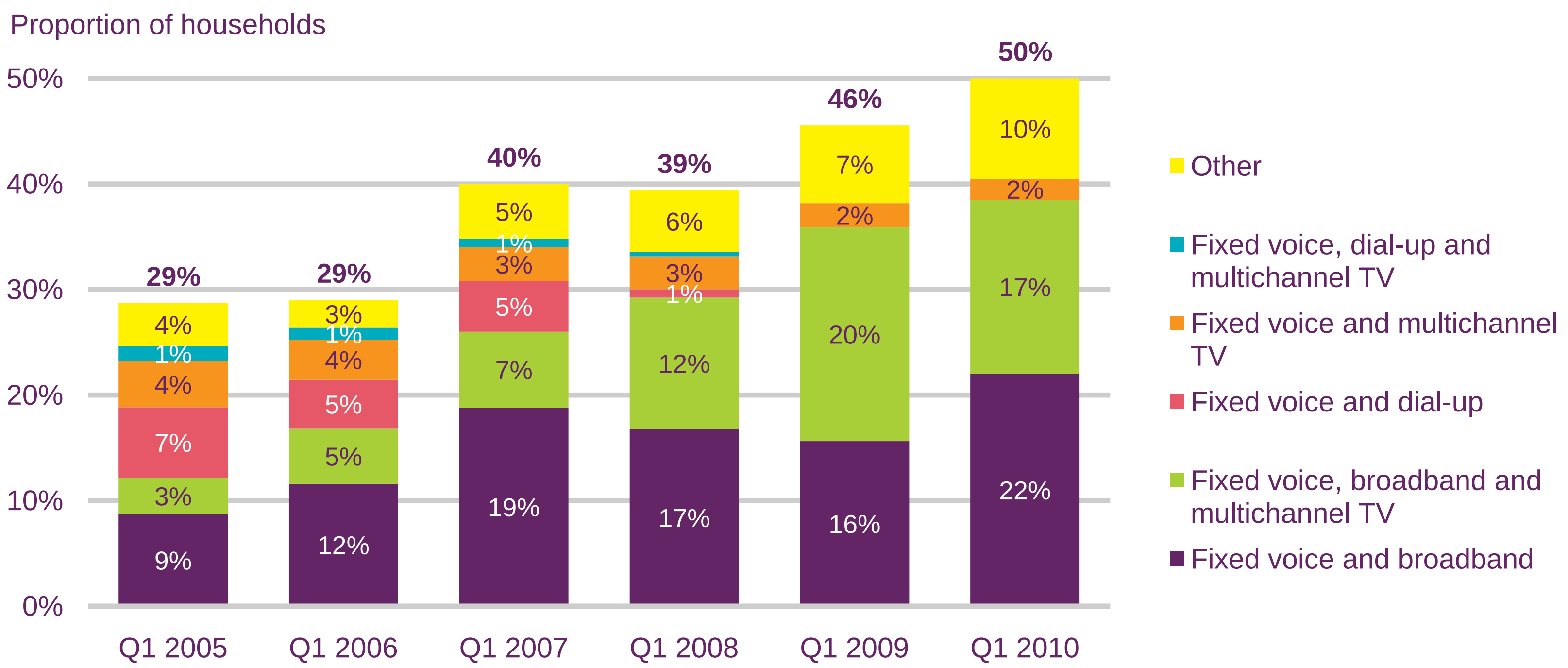
Importance and attention of activities for adults 55+ – based on mean scores



Source: Ofcom research, base = all 55+ respondent days: 2373, all activities with base>50 respondent days for attention and base>50 respondents for importance; base: all who ever do activity and have undertaken it in week of research, size of bubble proportional to weekly reach.

1.4 Bundling of communications services

Figure 1.40
Take-up of bundled services over time

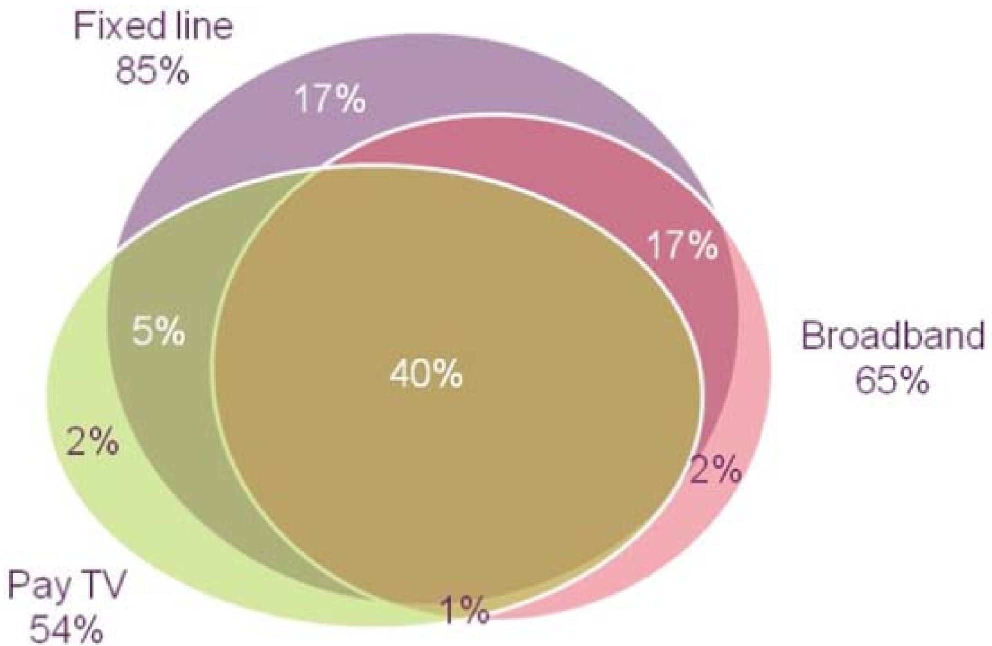


QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?

Source: Ofcom technology tracker

Figure 1.41

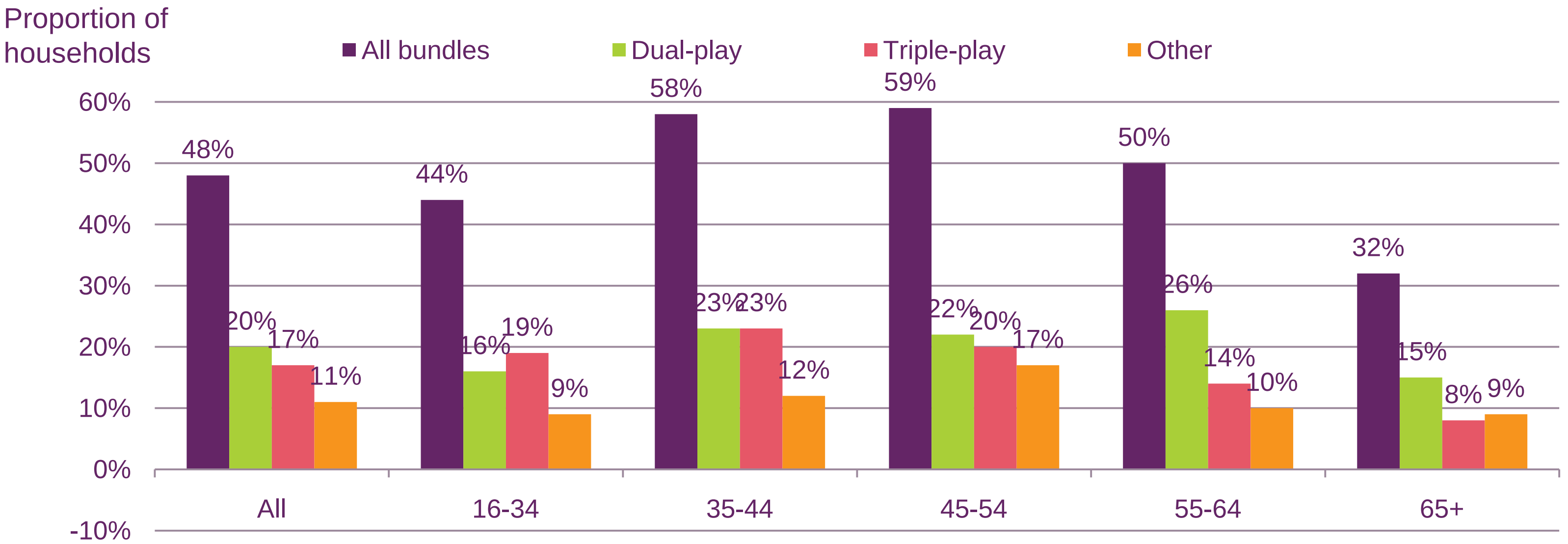
Proportion of all UK households taking communications services



Source: Ofcom industry analysis, Q1 2010

Figure 1.42

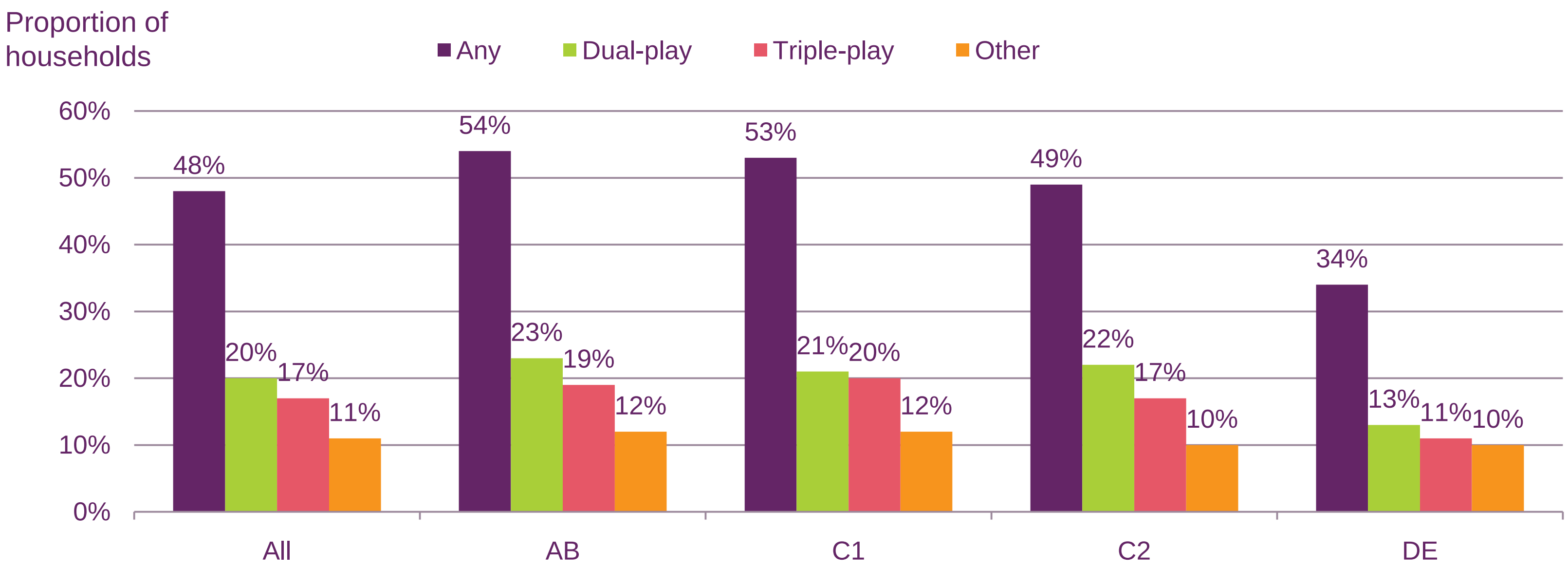
Take-up of bundled services, by age



QA1/ QA6/ QA7/ QA7A/ QA8 – Which of these services are in your household?/ Which supplier do you use for [SERVICE]?/ Do you receive one bill or separate bills for your [SERVICES]?/ To confirm, which services do you receive covered by a single bill from that supplier?/ Do you get these services as a package or as separate services?
Base: All respondents (2871 aged 16+, 826 aged 16-34, 536 aged 35-44, 496 aged 45-54, 466 aged 55-64, 547 aged 65+).
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.43

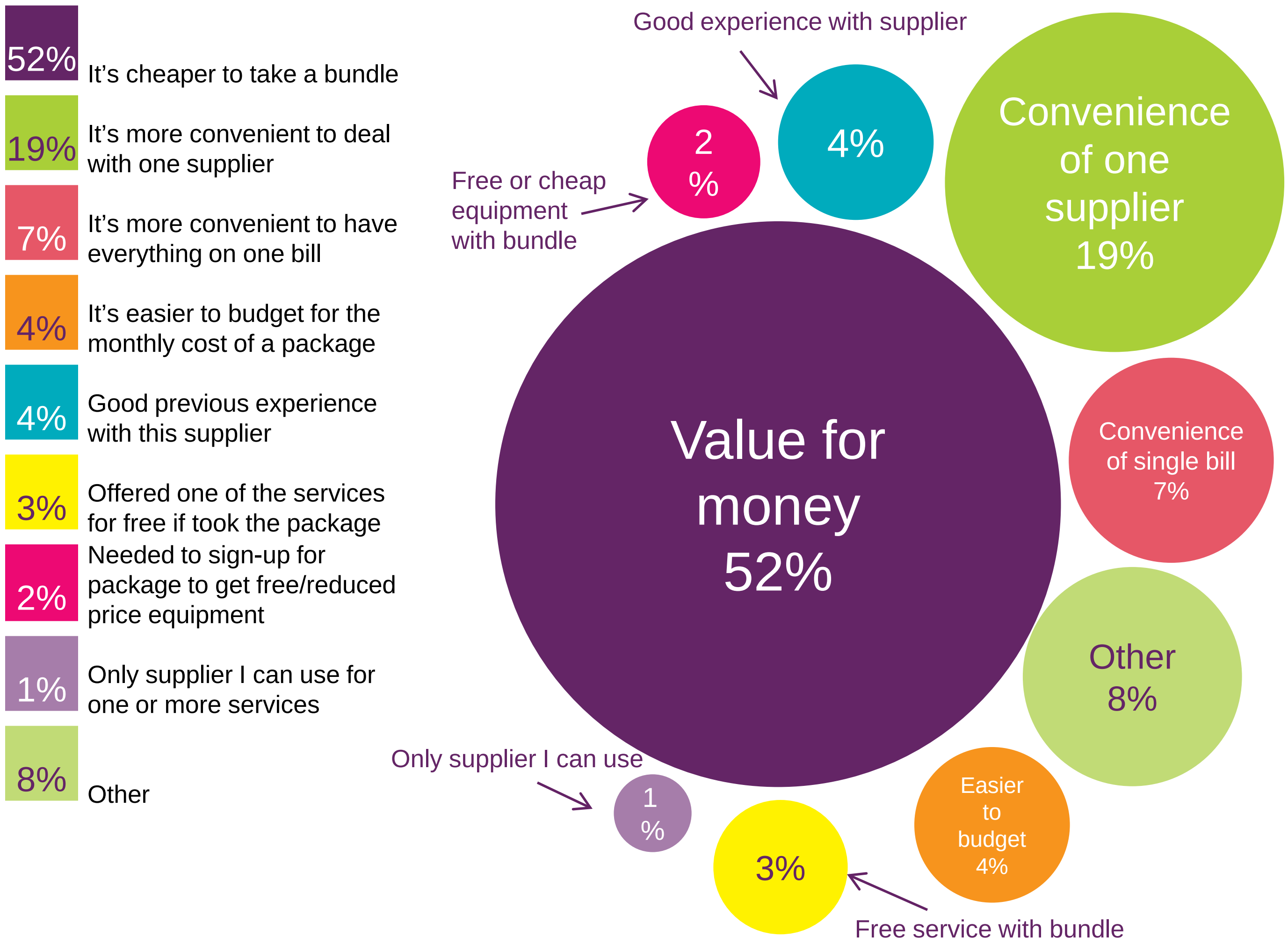
Bundling take-up by socio-economic group



QA1/ QA6/ QA7/ QA7A/ QA8 – Which of these services are in your household?/ Which supplier do you use for [SERVICE]?/ Do you receive one bill or separate bills for your [SERVICES]?/ To confirm, which services do you receive covered by a single bill from that supplier?/ Do you get these services as a package or as separate services?
Base: All respondents (2871 aged 16+, 826 aged 16-34, 536 aged 35-44, 496 aged 45-54, 466 aged 55-64, 547 aged 65+).
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.44

Main reason for taking a communications service bundle



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Which one was most important in your decision to take a package of services?

Base: Those who receive a package of services for which they receive one bill (1424 any bundle, 299 BT double play, 361 Other double play, 150 Sky triple play, 308 Virgin triple play)

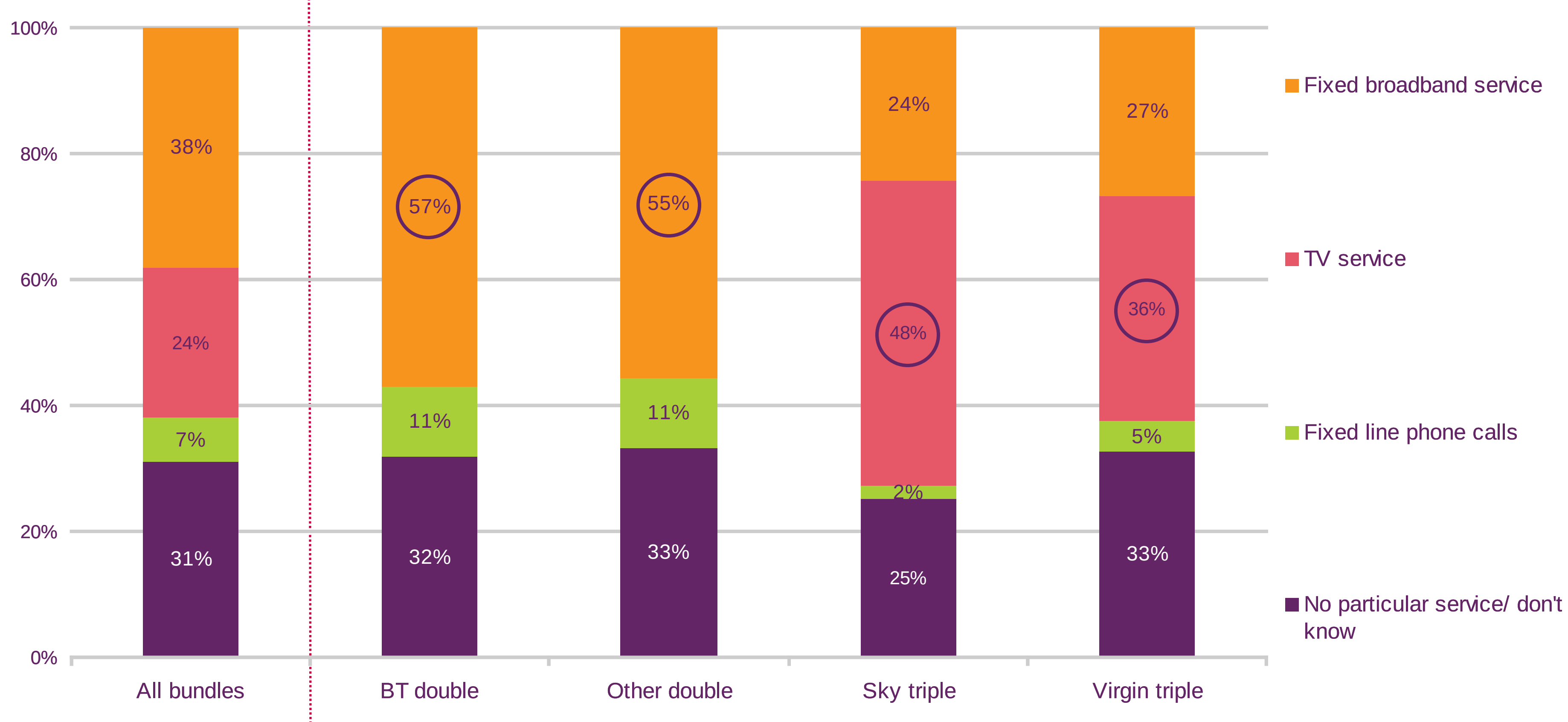
Figure 1.45

Whether customers receive a discount for buying a bundle

QA1/ QA6/ QA7/ QA13/ QA14 – Which of these services are in your household? Which supplier do you use for [SERVICE]? Do you receive one bill or separate bills for your [SERVICES]? Do you receive a discount or special deal for having this package of services? Do you think you pay less of having these services from the same supplier than you would if you had shopped around and bought the services separately from different suppliers?
Base: All respondents (2871). Those who receive a package of services for which they receive one bill (1424)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.46

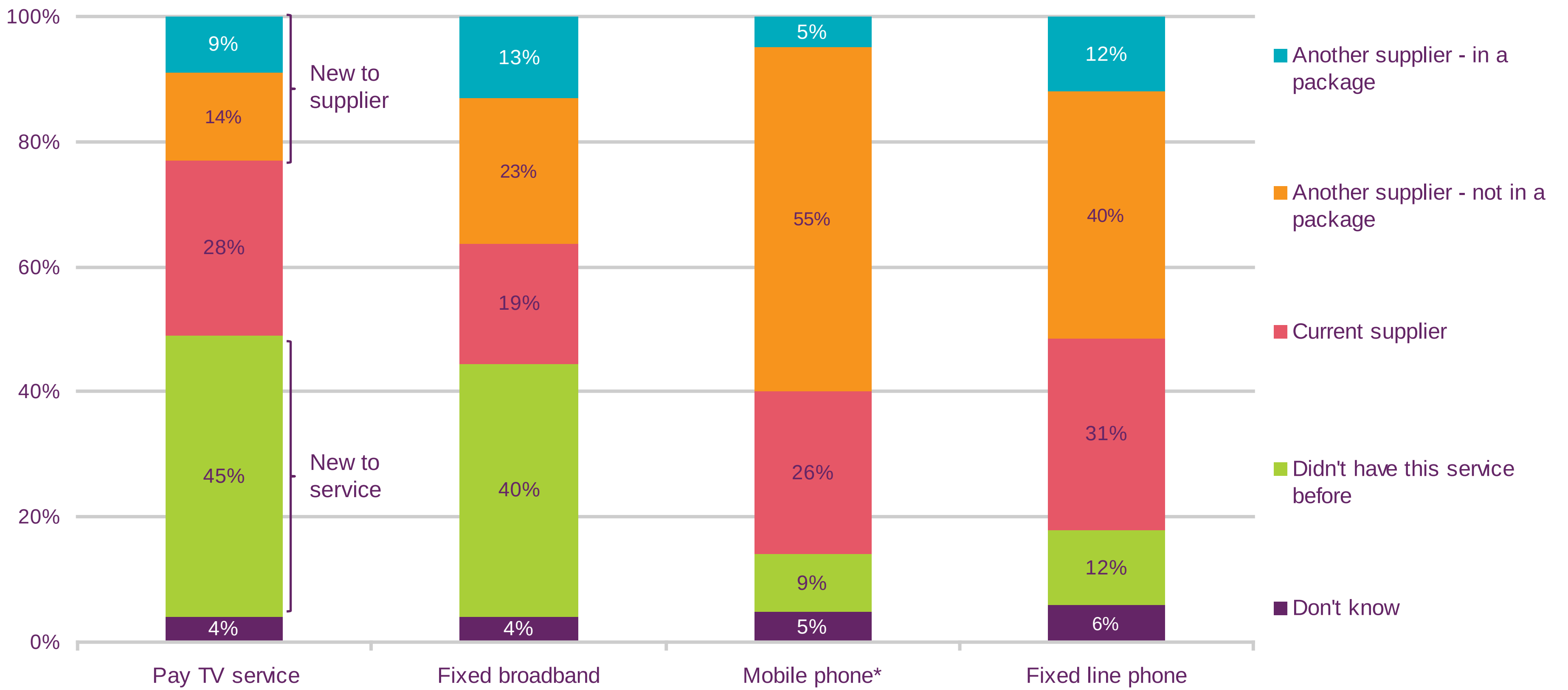
Anchor products in dual- and triple play bundles



QA18 – Is there one service in your package which you particularly wanted to use [SUPPLIER] for? Which service?
Base: Those who receive a package of services for which they receive one bill (1424 any bundle, 299 BT double play, 361 Other double play, 150 Sky triple play, 308 Virgin triple play)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.47

Consumers who did not have a service before taking it in a bundle



QA17B/C/E – Who did you use for your [SERVICE] before you had your package of services with [SUPPLIER]?
Base: Those who receive a package of services for which they receive one bill (725 with Pay TV in package, 1338 with Fixed broadband in package, 74 with mobile phone in package, 1295 with Fixed line phone in a bundle)
NB: *Low base for mobile phone in a package; treat as indicative only
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

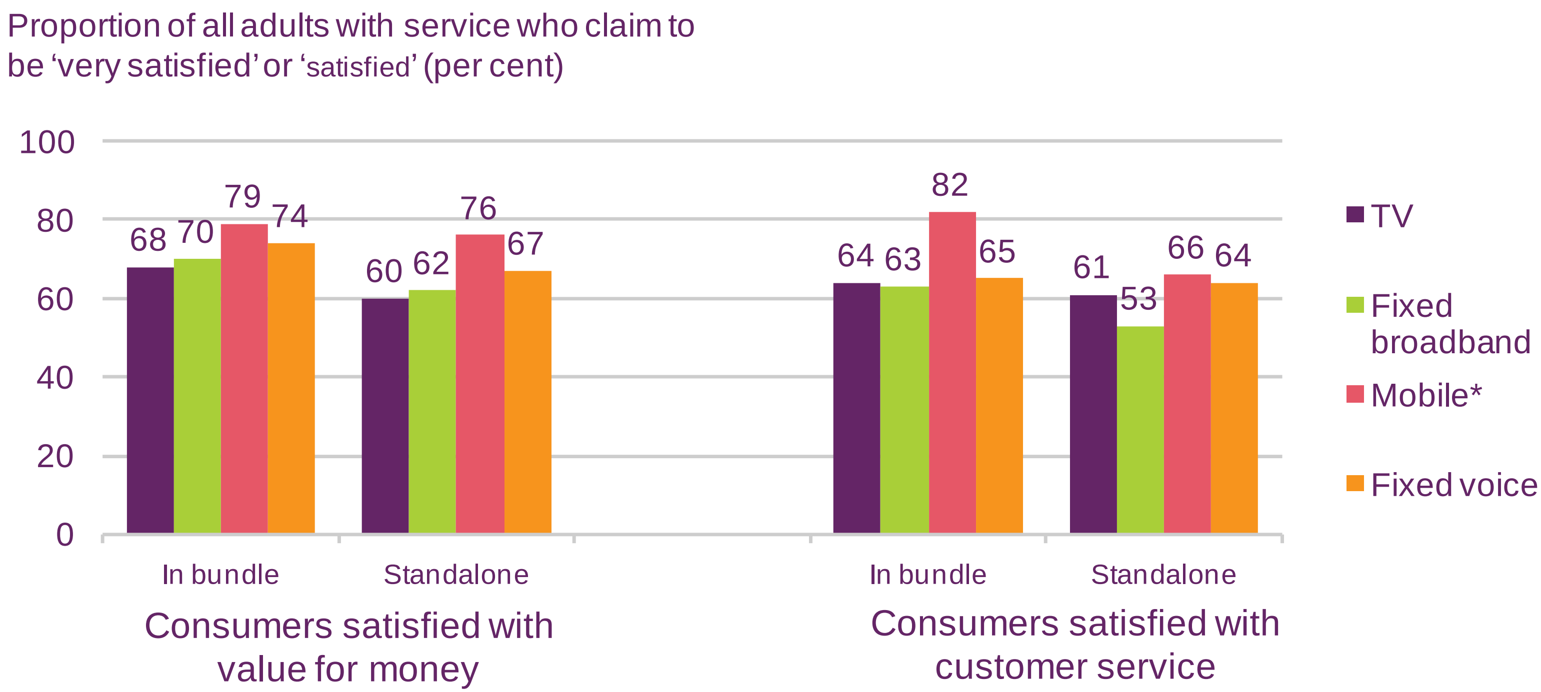
Figure 1.48

Satisfaction with bundled and standalone communications services

QA21B-E – How satisfied are you with the overall service provided from your [SERVICE]?
Base: All respondents with each service (725 TV in a package, 996 TV standalone, 1338 fixed broadband in package, 714 fixed broadband standalone, 74 mobile in package, 2256 mobile standalone, 1295 fixed line in package, 1214 fixed line standalone)
NB: *Low base for mobile phone in a package; treat as indicative only
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.49

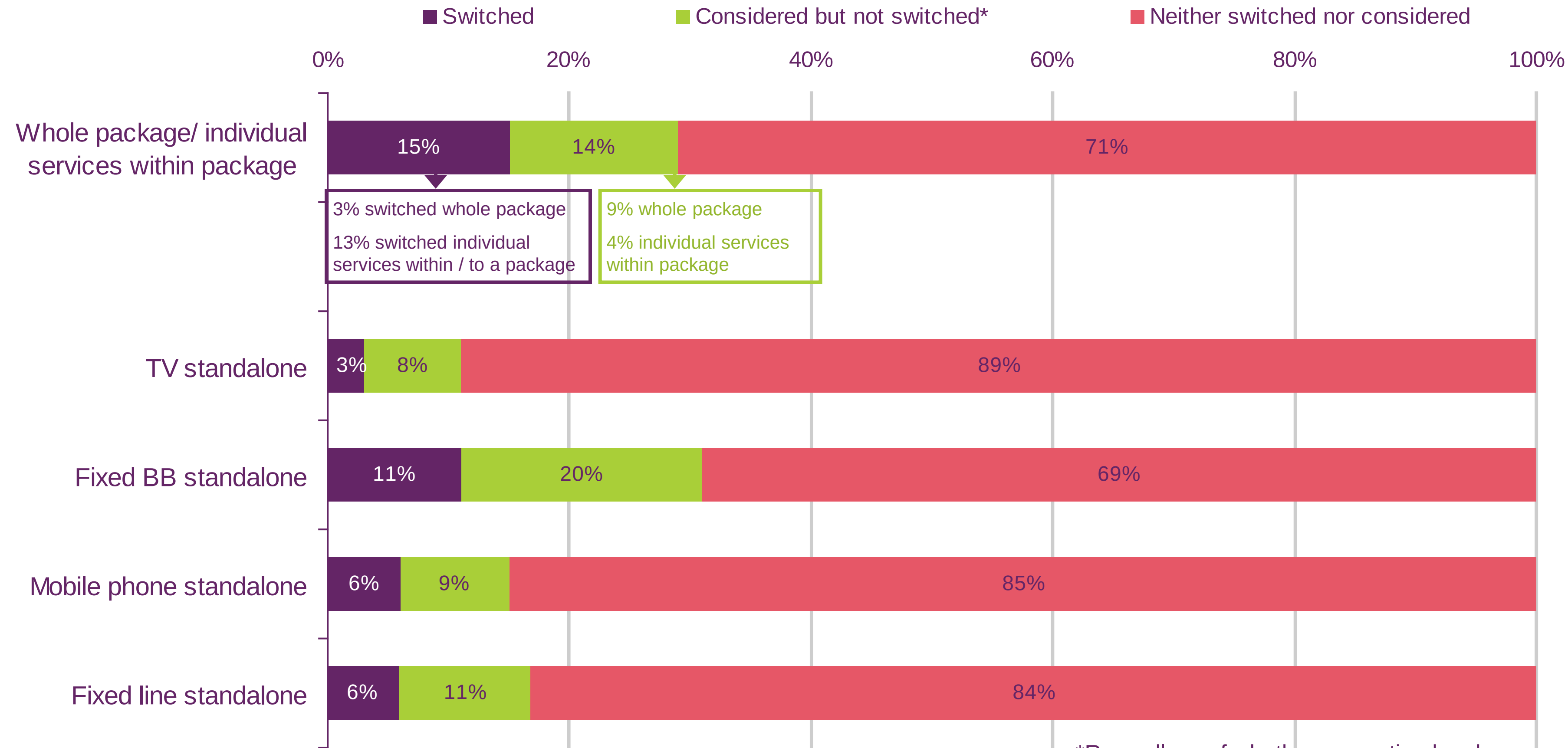
Satisfaction with bundled and standalone communications services



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010
How satisfied are you with your experience of dealing with the customer services for your [SERVICE]? Indicates all those who are satisfied or very satisfied, includes 'don't knows'
Base: All respondents with each service (725 TV in a bundle, 996 TV stand-alone, 1338 fixed broadband in bundle, 714 fixed broadband stand-alone, 74 mobile in bundle, 2256 mobile stand-alone, 1295 fixed line in bundle, 1214 fixed line stand-alone)
*Low base for mobile phone in a bundle; treat as indicative only

Figure 1.50

Consumers who have switched or considered switching communications services in the last 12 months

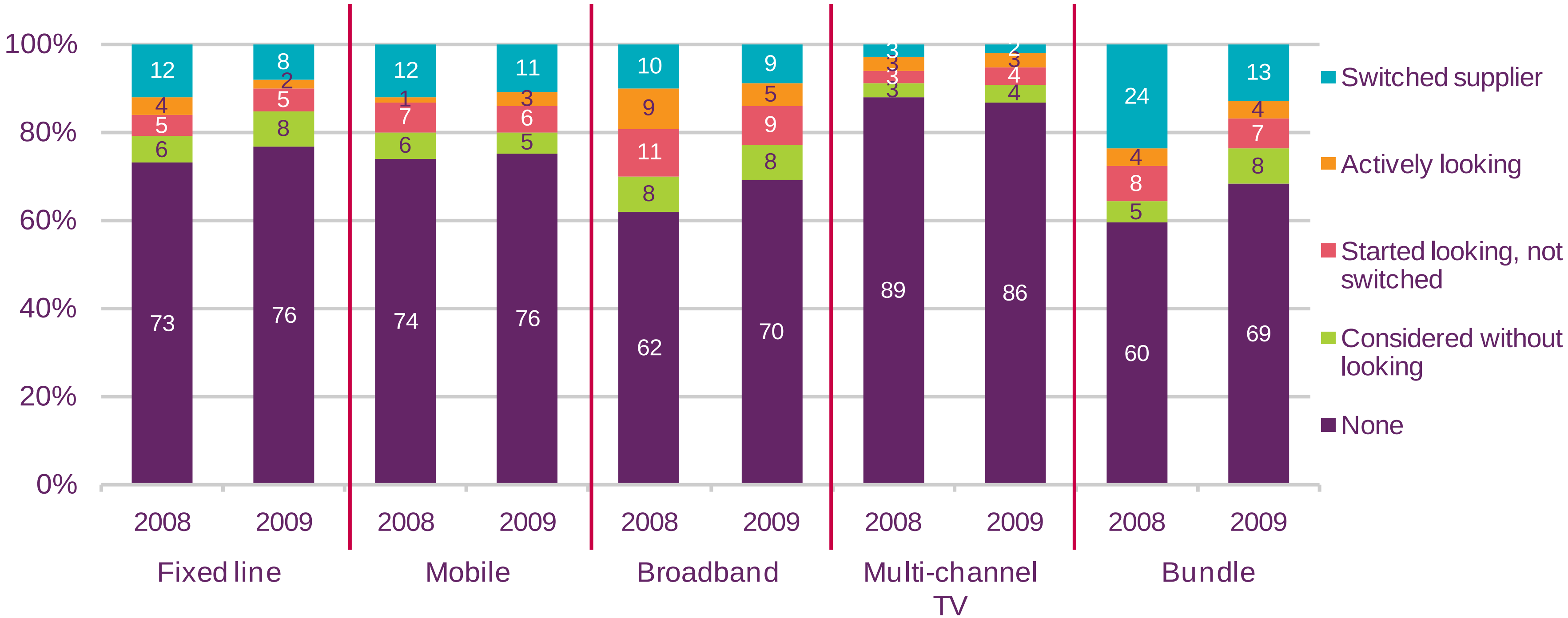


*Regardless of whether any action has been taken or whether currently actively looking

QA26/ QA29 – Which of the following applies to your household/ [SERVICE] in the last year?
Base: Those with a package of services for which they receive one bill (1424), Those with each service as a standalone service (996 TV, 714 fixed broadband, 2556 mobile phone, 1214 fixed line)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.51

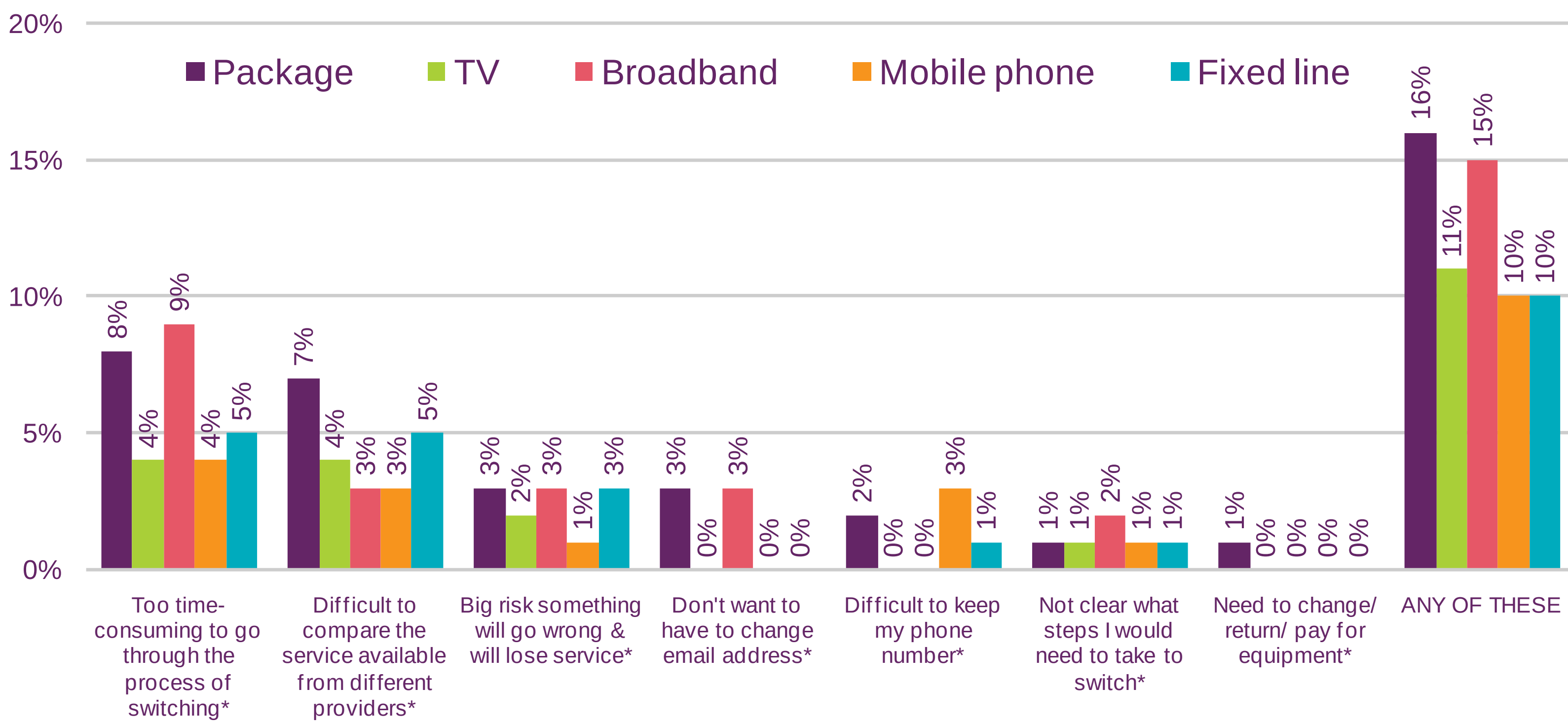
Switching in communications market in the past 12 months



Source: Ofcom decision-making survey July 2007, July 2008 and July 2009
Base: All who are the decision-maker for each service; fixed line (2008, 941), (2009, 781), mobile (2008, 1270), (2009, 1231), broadband ((2008, 460), (2009, 388), multichannel TV) (2008, 896), (2009, 837), bundled services (2008, 534), (2009, 631)

Figure 1.52

Hassle-related barriers to considering switching communications provider

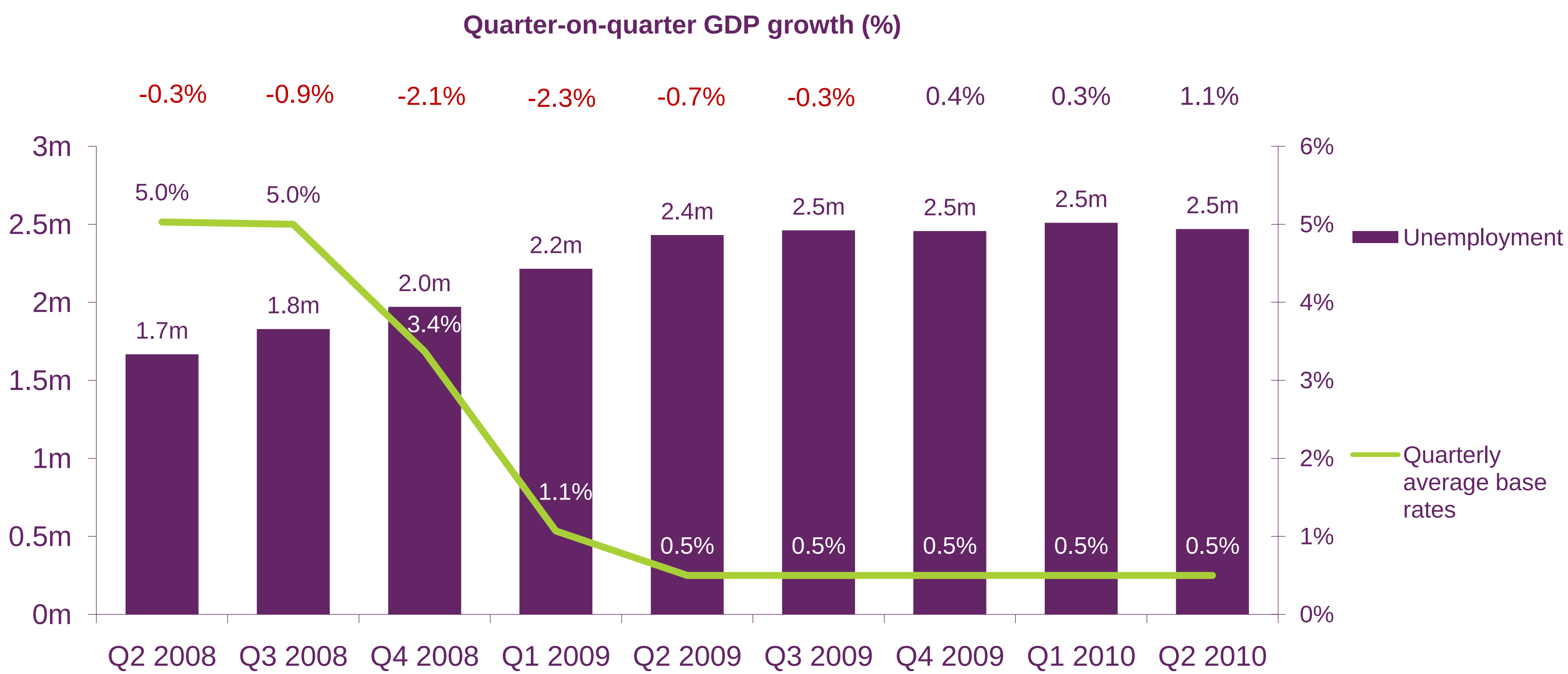


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010
Which, if any, of these are reasons why you have not considered switching to another supplier for your (SERVICE) in the last year? (Prompted responses, multi-coded)
*Denotes hassle obstacles related to the switching process
Base: Decision makers who have not switched or considered switching in the last 12 months (667 package of services, 551 pay TV, 243 fixed broadband, 1519 mobile phone, 686 fixed line voice)

1.5 Communications markets and the economy

Figure 1.53

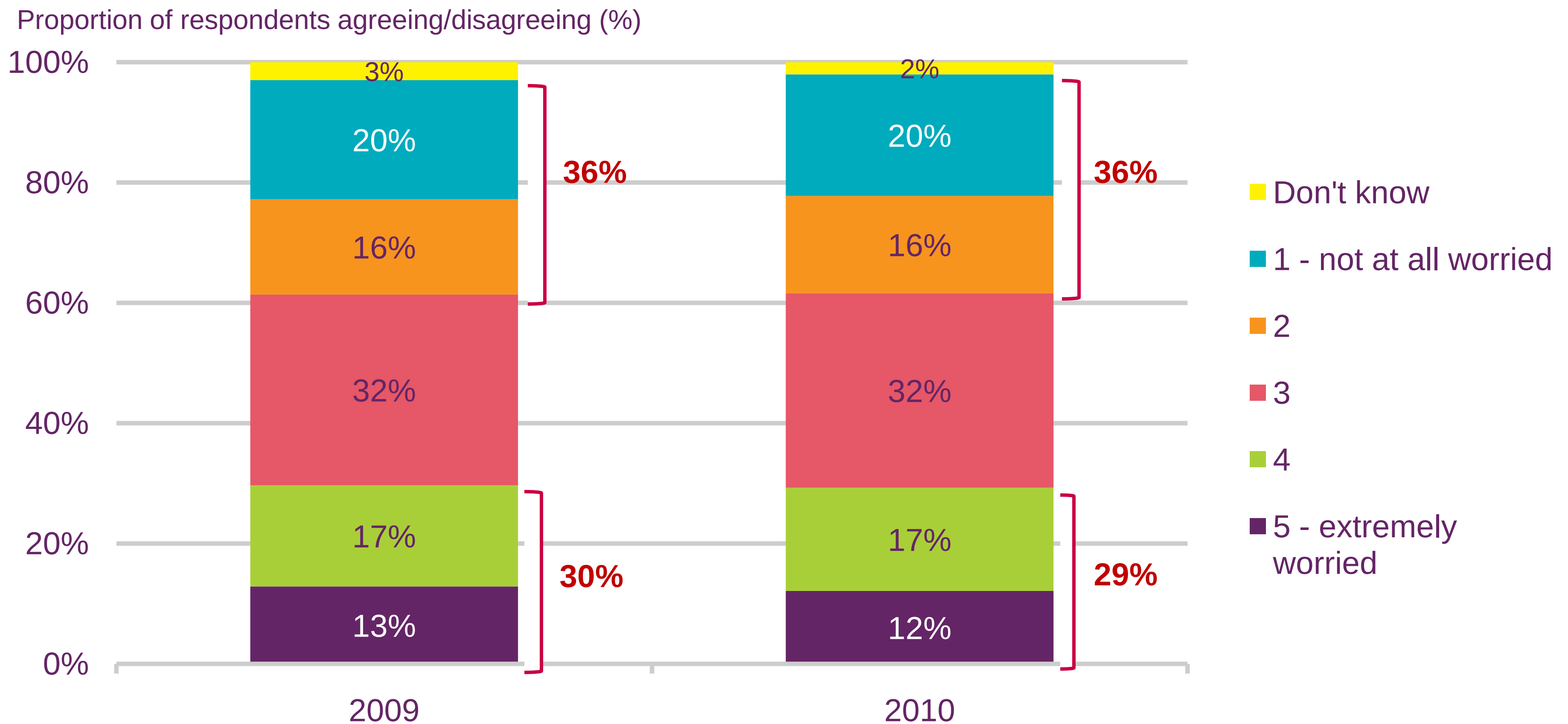
UK GDP quarterly growth, Bank of England base rates and unemployment



Source: Office for National Statistics and Bank of England

Figure 1.54

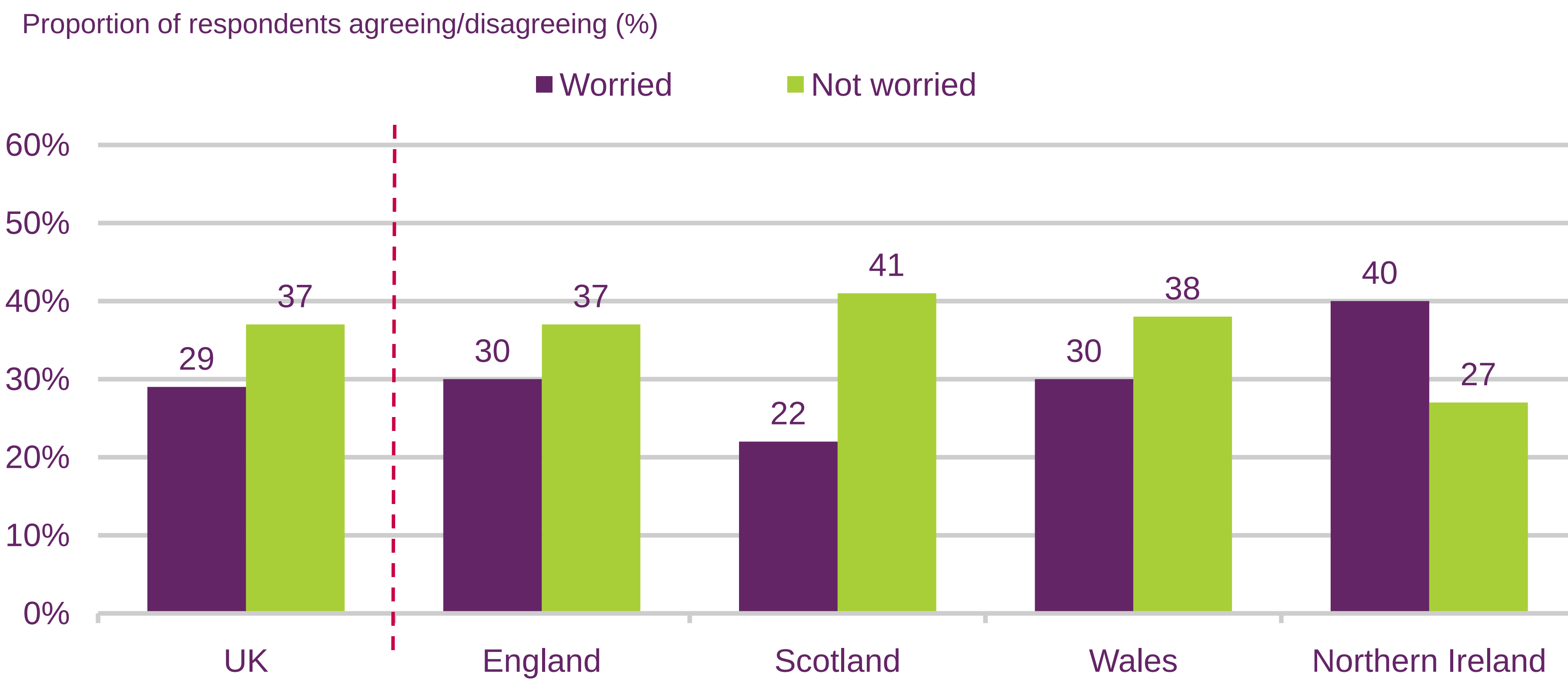
Consumer attitudes towards the recession



Source: Ofcom commissioned research
Base: Total sample (n=2444)
Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

Figure 1.55

Consumer attitudes towards the recession, by nation

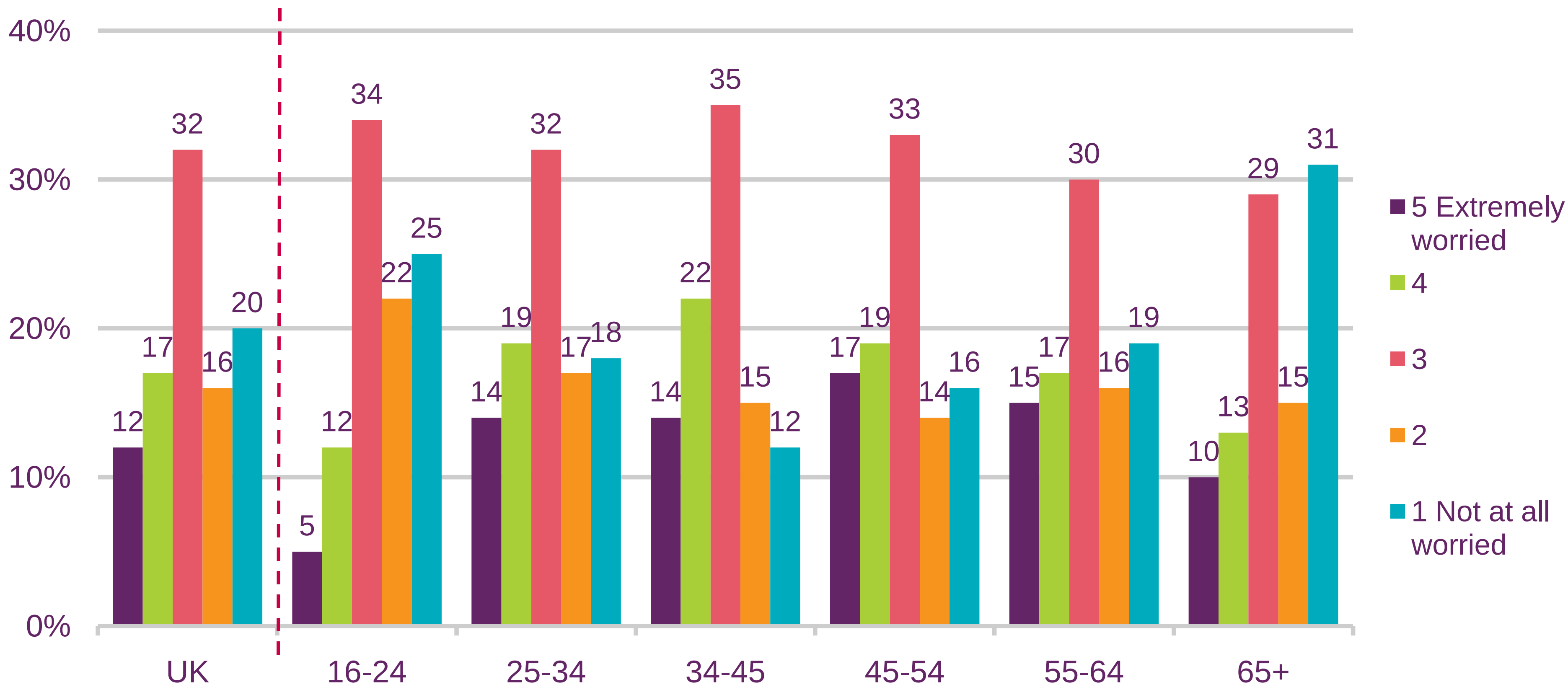


Source: Ofcom commissioned research
Base: All respondents (n=2444 for UK, 1727 for England, 285 for Scotland, 203 for Wales, 229 for Northern Ireland)
Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

Figure 1.56

Consumer attitudes towards the economic downturn, by age

Proportion of respondents agreeing/disagreeing (%)



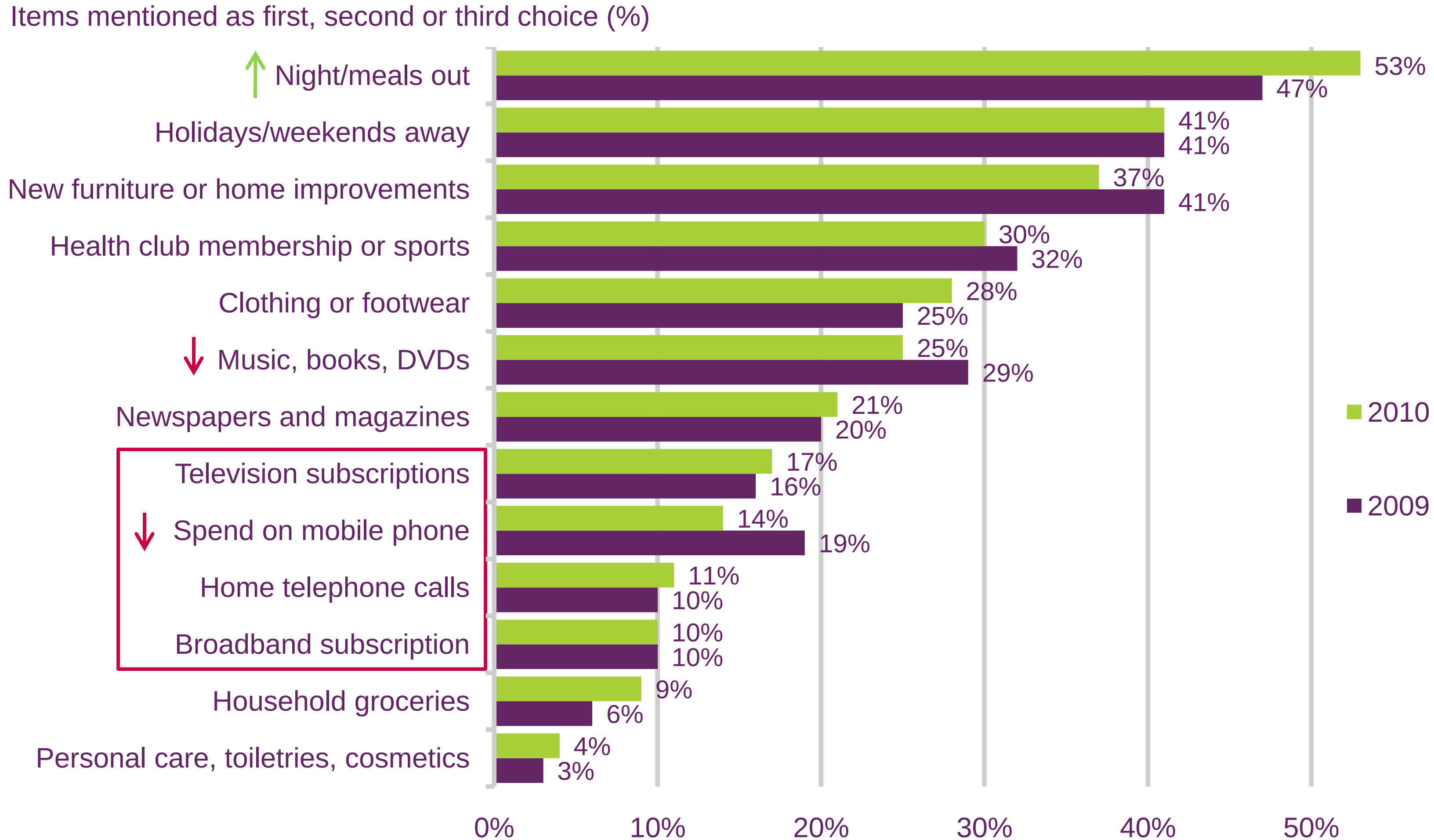
Source: Ofcom commissioned research

Base: All respondents (n=2444 for UK, 327 for 16-24, 375 for 25-34, 418 for 35-44, 382 for 45-54, 361 for 55-64, 581 for 65+)

Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

Figure 1.57

Items where consumers are most likely to cut back their spending

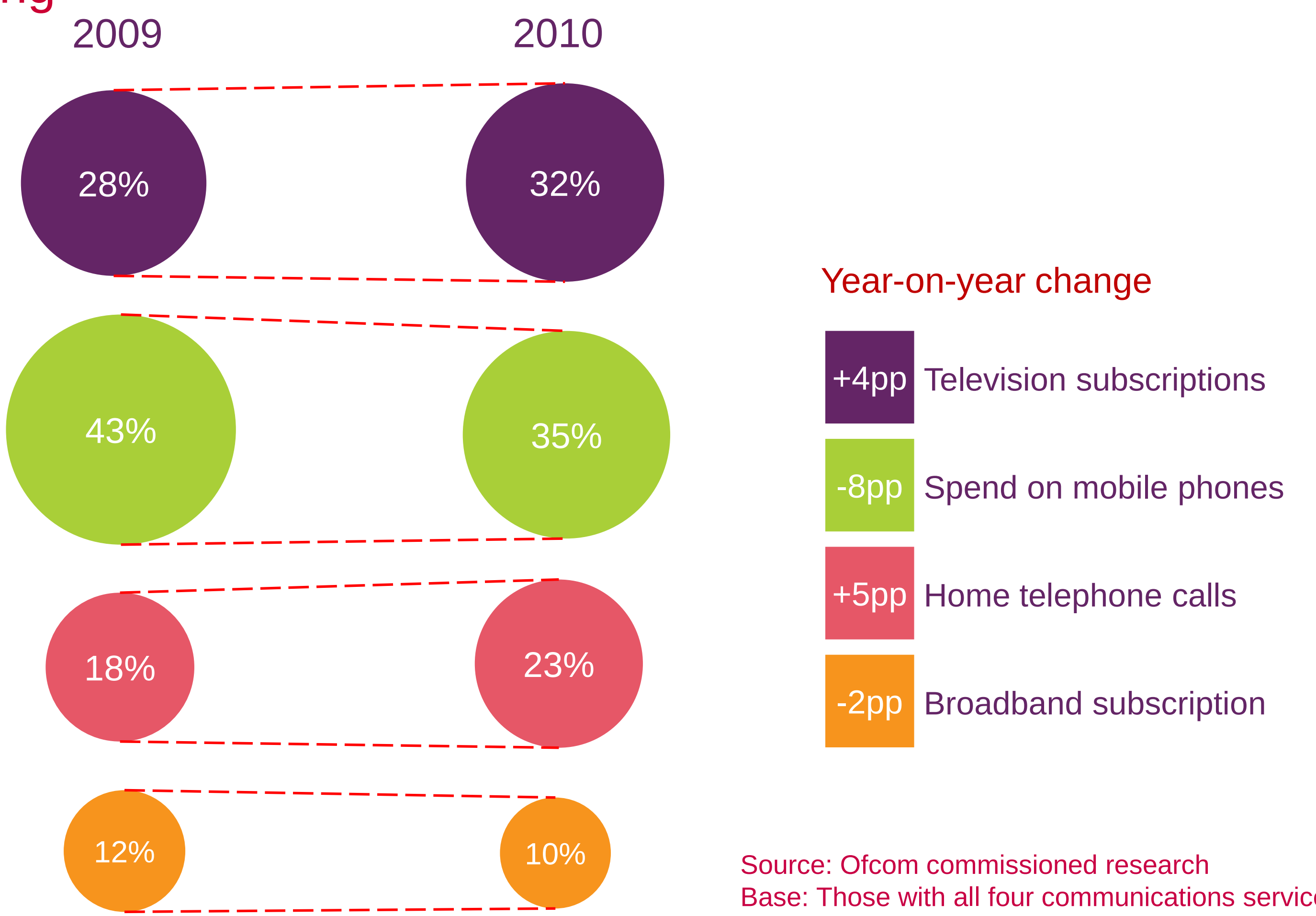


Source: Ofcom-commissioned research
Base: Those with all four services 2010 (n=823), 2009 (n=862)
Question: If you were forced to cut back on spending, which of the following items would you be most likely to spend less on?

Source: Ofcom-commissioned research
Base: Those with all four communications services (n=823)
Question: Which ONE of the following would you be most likely to cut back spending on?

Figure 1.58

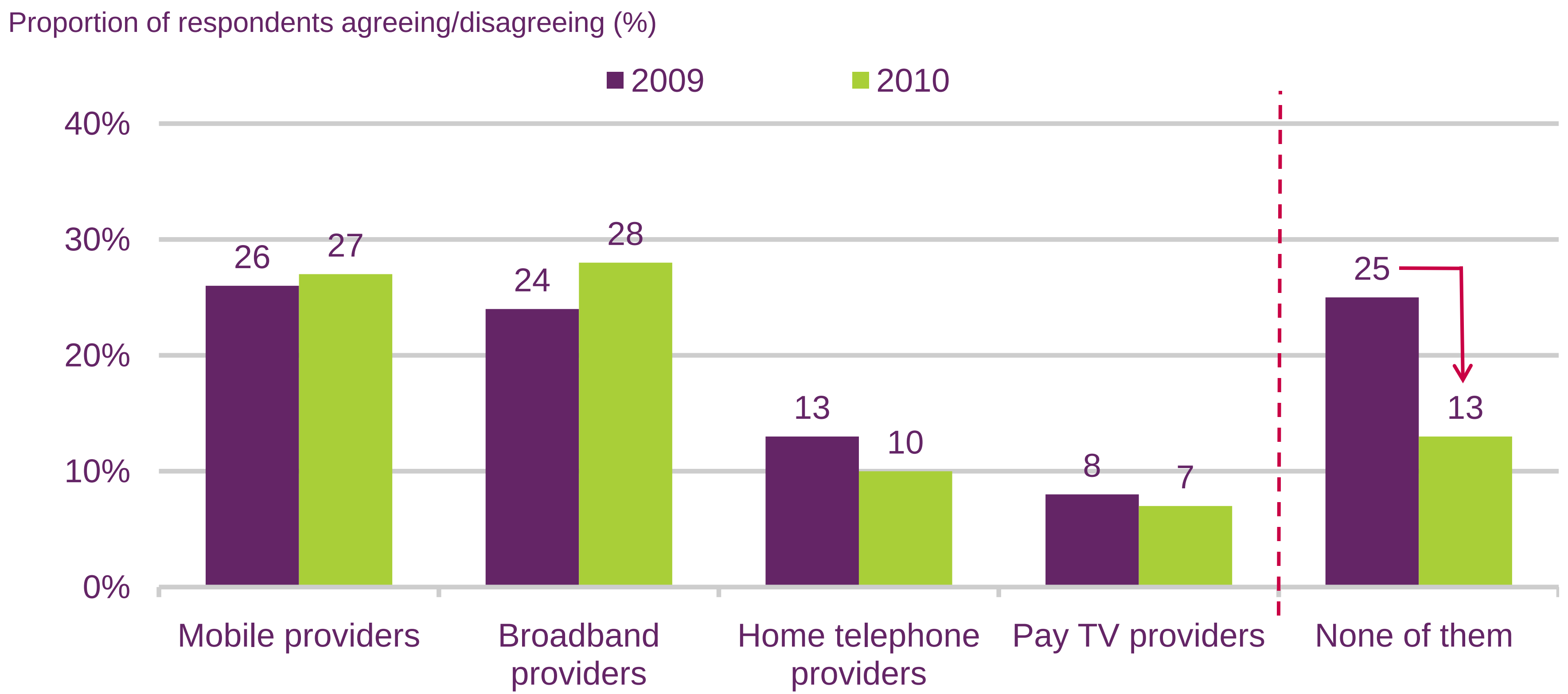
The communication services on which consumers would be most likely to cut spending



Source: Ofcom commissioned research
Base: Those with all four communications services (n=823)
Question: Which ONE of the following would you be most likely to cut back spending on?

Figure 1.59

Proportion of consumers agreeing that providers offer better deals now than a year ago



Source: Ofcom-commissioned research
Base: Total sample (n = 2444)
Question: Which of the following providers, if any, do you think are offering better deals than they were 12 months ago?

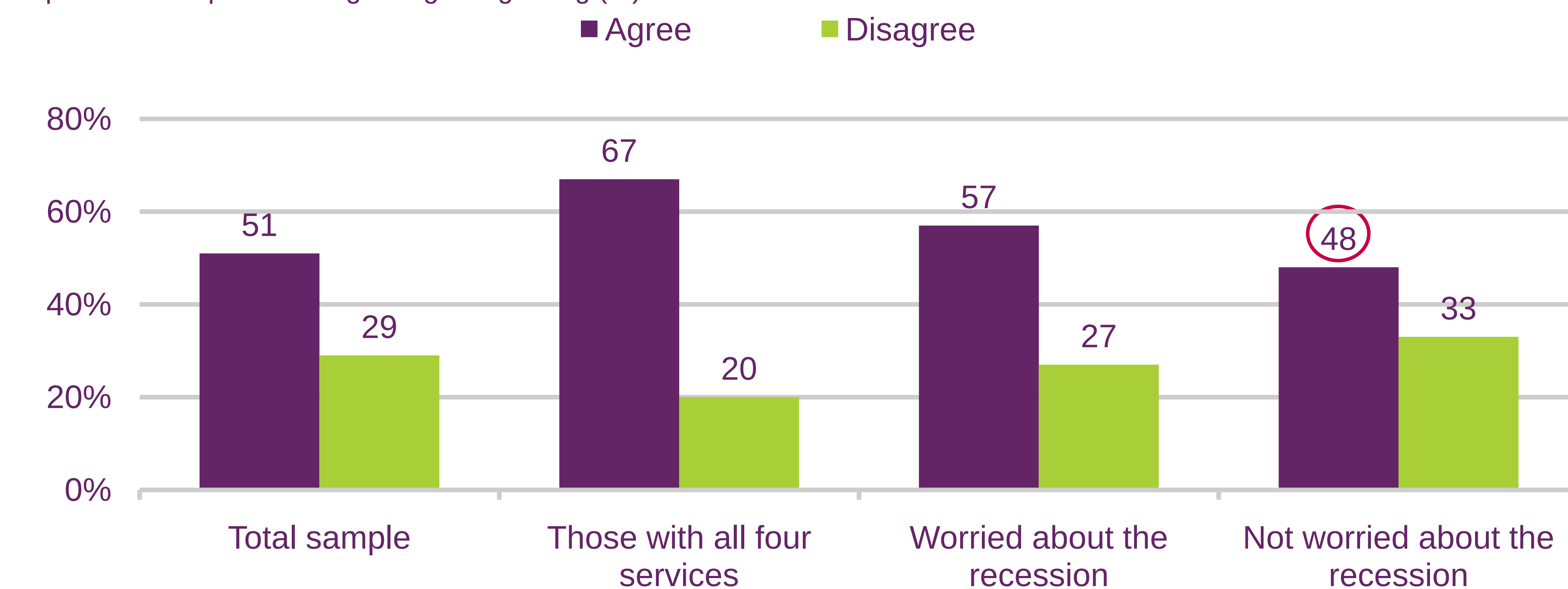
Figure 1.60

Consumers' agreement/disagreement that they were more likely to take communications services in a bundle

Source: Ofcom-commissioned research
Base: Total sample 2009 (n=2321) 2010 (n = 2444)
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.61

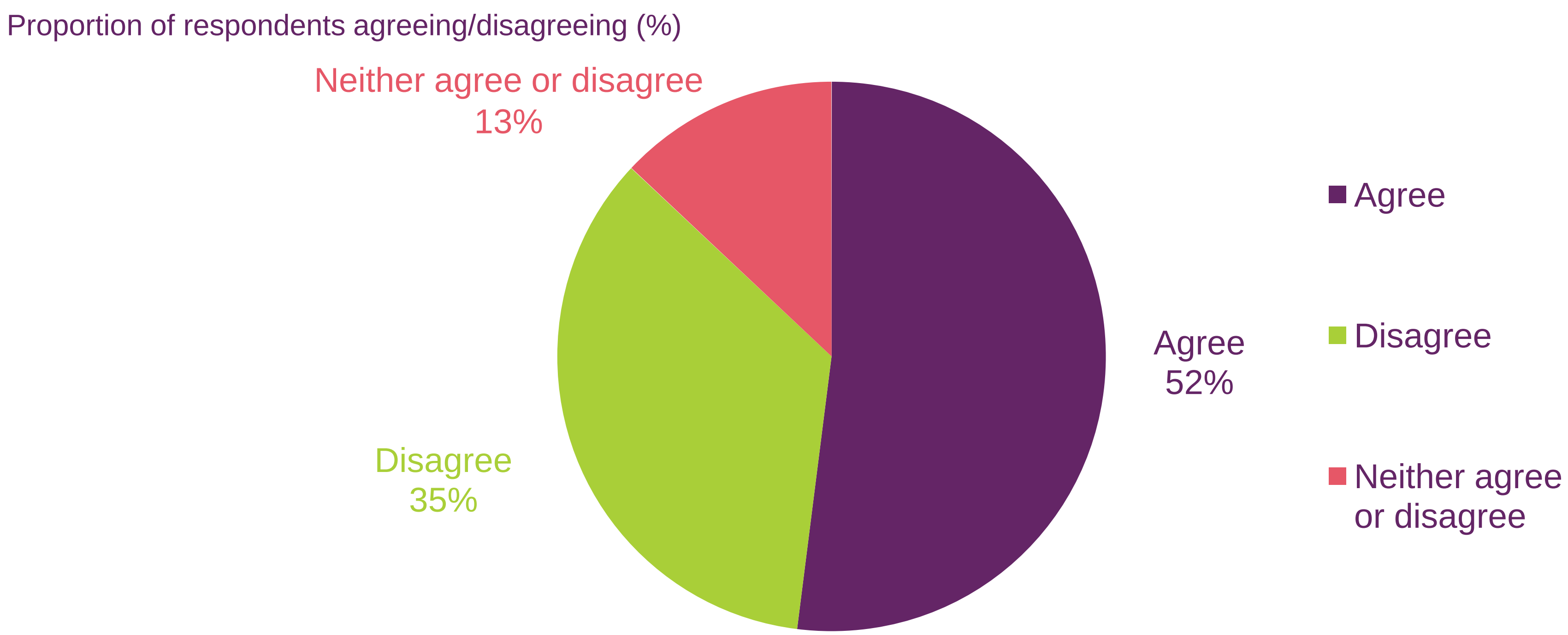
Consumers' agreement/disagreement that they were more likely to take communications services in a bundle



Source: Ofcom-commissioned research
Base: Total sample (n = 2444), those with all 4 services (823), worried about being personally affected by recession (722), not worried about being personally affected by recession (907)
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.62

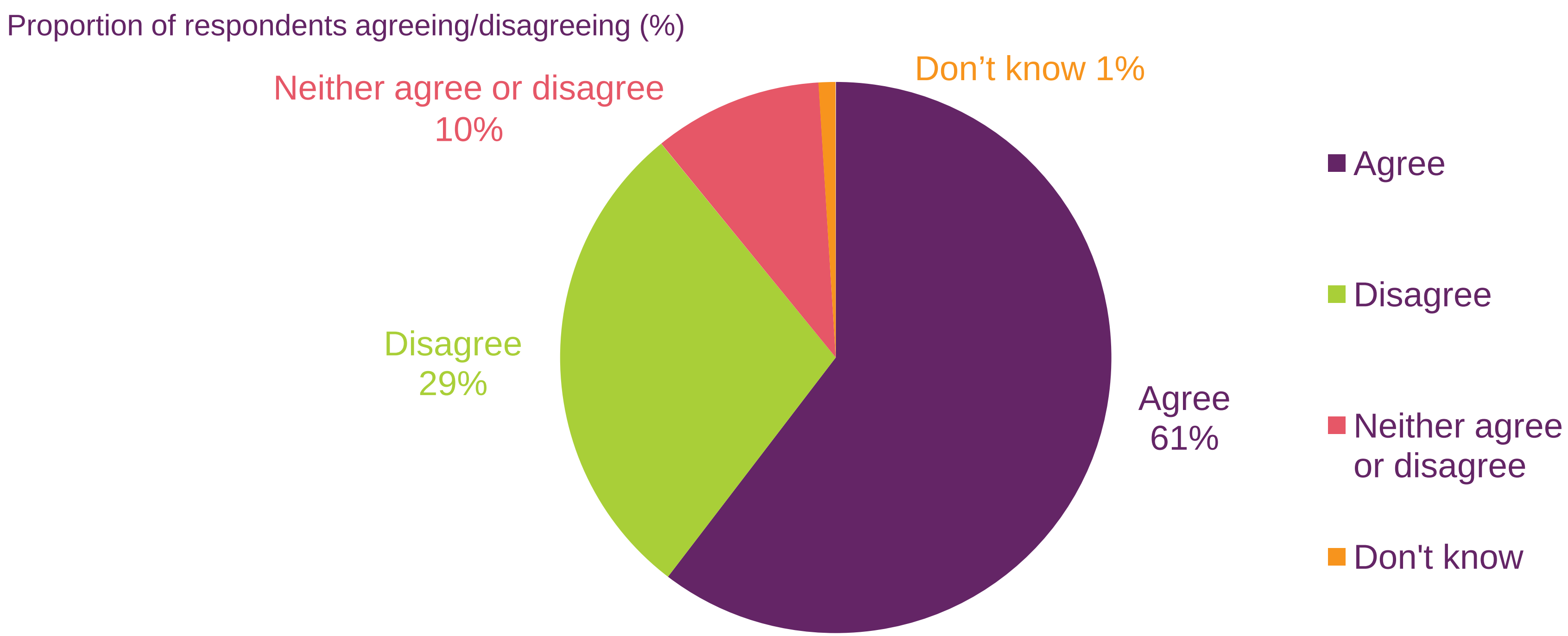
Consumers' agreement/disagreement that they were more likely to purchase goods over the internet in order to save money



Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)
Question: How much do you agree... I am more likely to purchase goods and services over the internet than in shops in order to save money

Figure 1.63

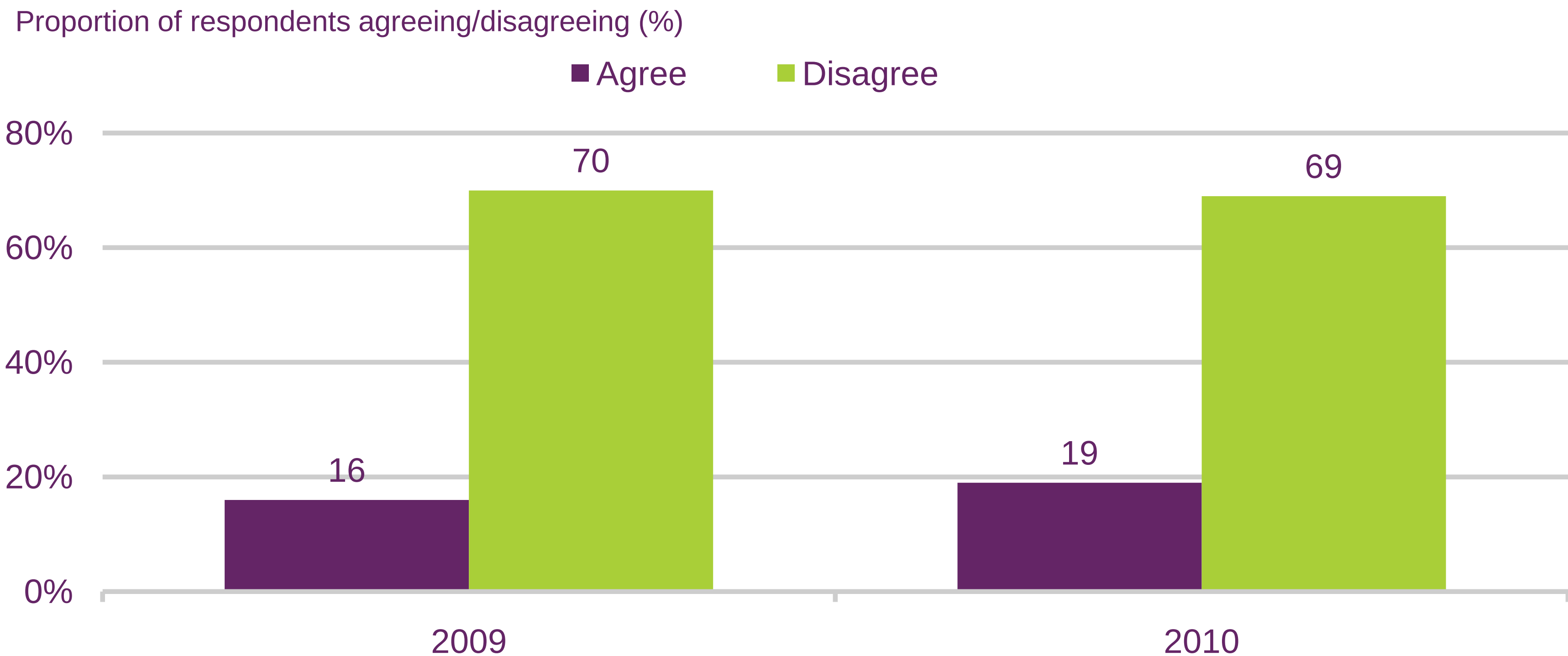
Consumers' agreement/disagreement that they were more likely to use price comparison websites in order to find the best deal



Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)
Question: How much do you agree... I am more likely to use price comparison websites (such as uswitch.com or pricerunner.co.uk) in order to find the best deal

Figure 1.64

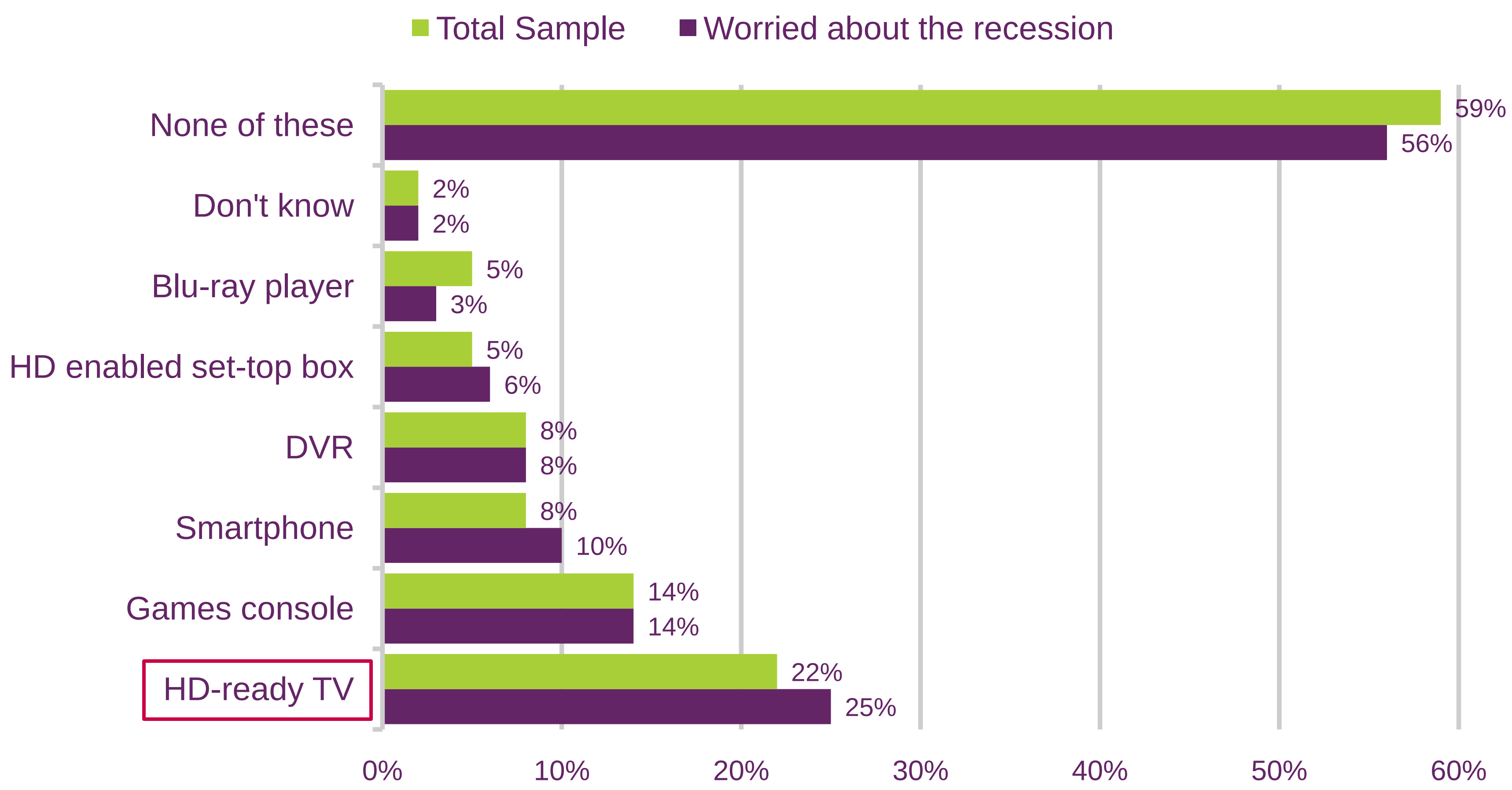
Consumers' agreement/disagreement that they were more likely to make calls over the internet rather than using a home landline



Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)
Question: How much do you agree... I make more telephone calls over the internet, using services like Skype, rather than using my home phone

Figure 1.65

Selected communications devices bought in the last 12 months



Source: Ofcom commissioned research
Base: Total sample (n=2444), worried about being personally affected by recession (722)
Question: Which, if any, of these products or services have you or your household bought in the last 12 months.

1.6 The nations’ communications markets

Figure 1.66

UK communications markets fast facts

	UK	England	Scotland	Wales	NI	UK urban	UK rural	England urban	England rural	Scotland urban	Scotland rural	Wales urban	Wales rural	N Ireland urban	NI Ireland rural
Digital TV take-up among TV homes[1]	92 ↑+2	92 ↑+2	91	97* ↑+8	87	92 ↑+2	92	92 ↑+3	92	91	89	97*	99*	87	87
Broadband take-up[2]	71 ↑+3	73 ↑+3	61	64 ↑+6	70 ↑+6	70	75	72	78 ↑+10	61	60	62	69	69	72
Mobile broadband[2]	15 ↑+3	15 ↑+2	12 ↑+5	16 ↑+5	14 ↑+6	16	11	16 ↑+3	10	13	10	15	17	16	10
Mobile phone take-up[3]	89	90	85	89 ↑+4	88	89	90	90	91	93 ↑+3	80	87	93	87	90
Use mobile to access data, inc. internet[4]	23 ↑+3	24 ↑+3	15	23 ↑+5	21	26 ↑+6	19	24 ↑+3	20	15	15	24	19	21	23
3G handset take-up[5]	26 ↑+4	26 ↑+3	26 ↑+6	28	18 ↑+4	26	25	26 ↑+3	26	27	17	26	10	18	17
Fixed landline take-up[6]	85 ↓-2	86	79	79	81	84	91	85	93	77	88	79	81	79	87
Households taking bundles[7]	51 ↑+5	52 ↑+4	44	44 ↑+9	44	51	48	52	50 ↑+13	46	37	45	39	45	41
Watching video online[8]	38 ↑+4	40 ↑+4	28 ↑+7	28	38	38	41	39 ↑+3	44 ↑+11	29	30	28	30	39	36
Use of social networking[8]	40 ↑+10	42 ↑+11	27 ↑+7	37 ↑+12	37 ↑+9	40	42	42 ↑+10	45 ↑+19	26	24	37	36	37	36
Current use of VoIP[9]	15 ↑+3	16 ↑+3	10	15	15 ↑+6	15 ↑+3	18 ↑+5	15	20 ↑+7	10	12	16	12	15	15

XX **Figure is higher than the UK average**

XX ↑+xx **Figure has risen by xx percentage points since 2009**

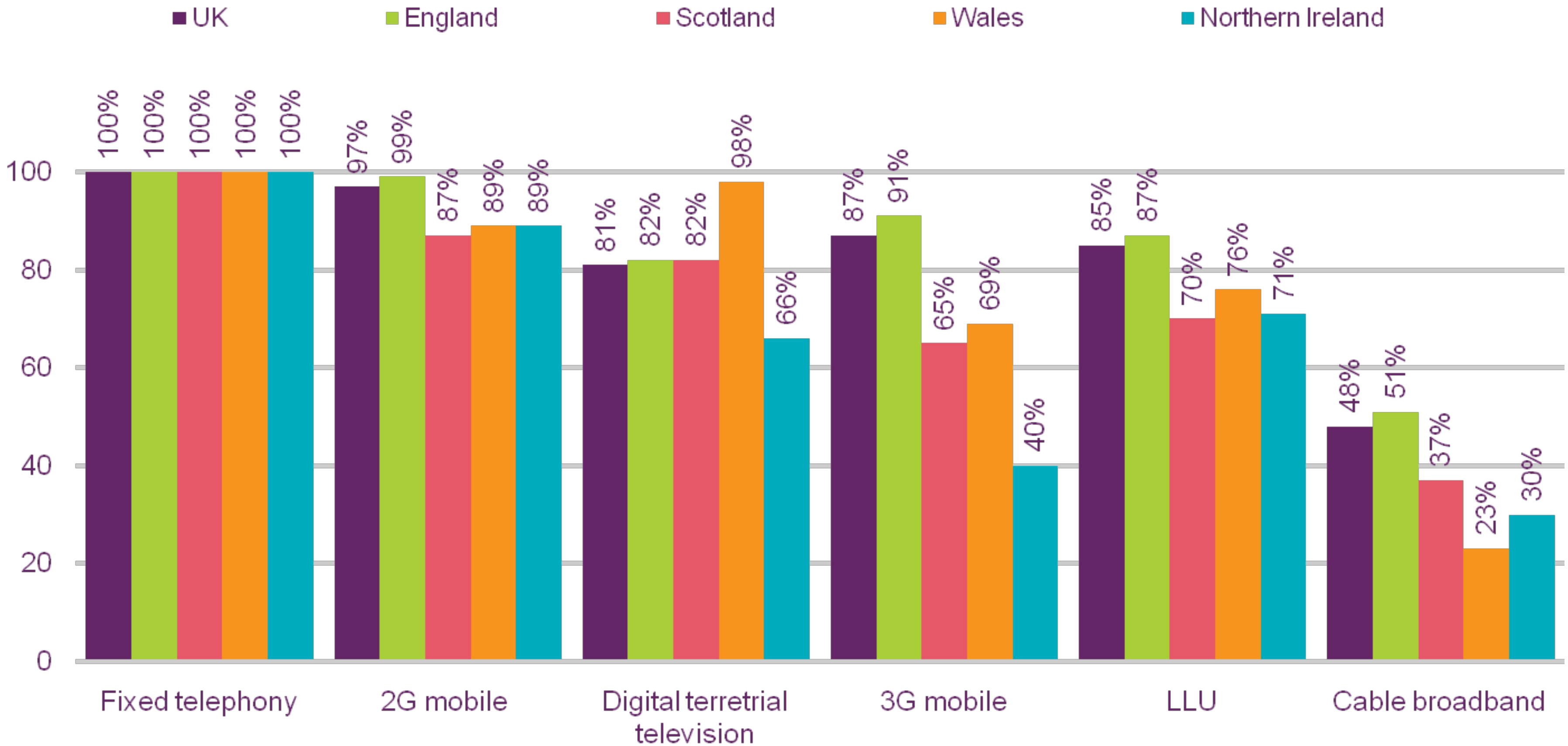
XX **Figure is lower than the UK average**

XX ↓-xx **Figure has fallen by xx percentage points since 2009**

Ofcom research Q1 2010
Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural). Questions:
[1]Which, if any, of these types of television does your household receive at the moment?
[2]Which of these methods does your household use to connect to the Internet at home?
[3]Do you personally use a mobile phone?
[4]Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?
[5]Do you personally use a 3G mobile handset?
[6]Is there a landline phone in your home that can be used to make and receive calls?
[7]Do you receive any of these services as part of an overall deal or package from the same supplier?
[8]Which, if any, of these do you or members of your household use the Internet for whilst at home?
[9]Have you or anyone in your household ever used one of these services to make voice calls using the Internet at home?
**Digital television take-up figures in Wales are now likely to be higher, since the research set out in this table was conducted while digital switchover was underway.*

Figure 1.67

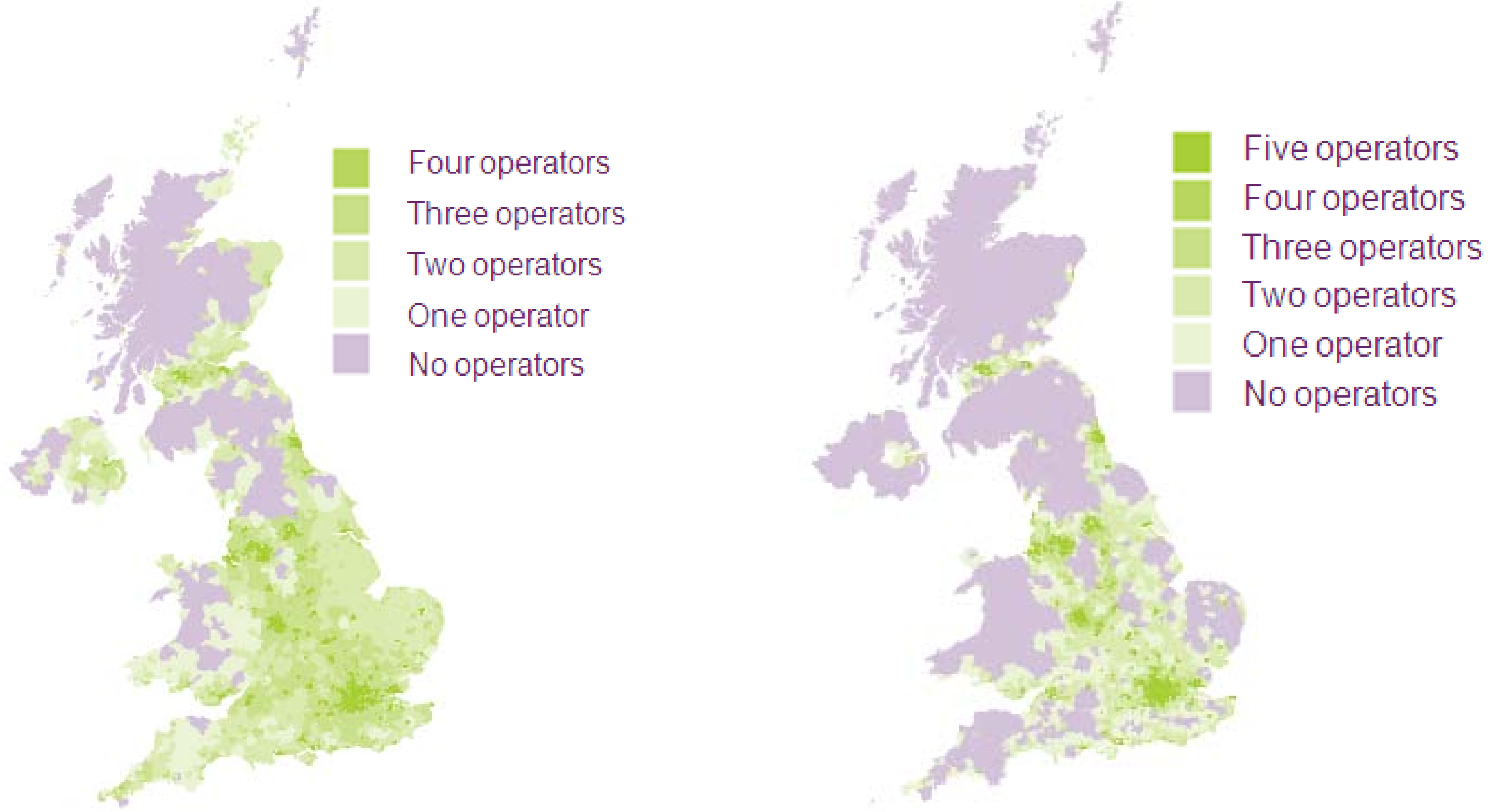
Communications infrastructure availability across the UK's nations



Sources: Ofcom and:1. Proportion of population living in postal districts where at least one operator reports at least 90% 2G area coverage. Sourced from GSM Association / Europa Technologies (Q1 2010).2. Proportion of population living in postal districts where at least one operator reports at least 90% 3G area coverage. Sourced from GSM Association / Europa Technologies (Q1 2008). Note we have raised this threshold from 75% in 2008; as a result we do not have time series data. Note that coverage data have been restated; this means that year-on-year comparisons are not possible.
3. Proportion of premises able to receive DSL services based on data reported by BT
4. Proportion of households passed by Virgin Media's broadband-enabled network
5. Proportion of households connected to an LLU-enabled exchange
6. Availability of 17 services. Ofcom estimates.

Figure 1.68

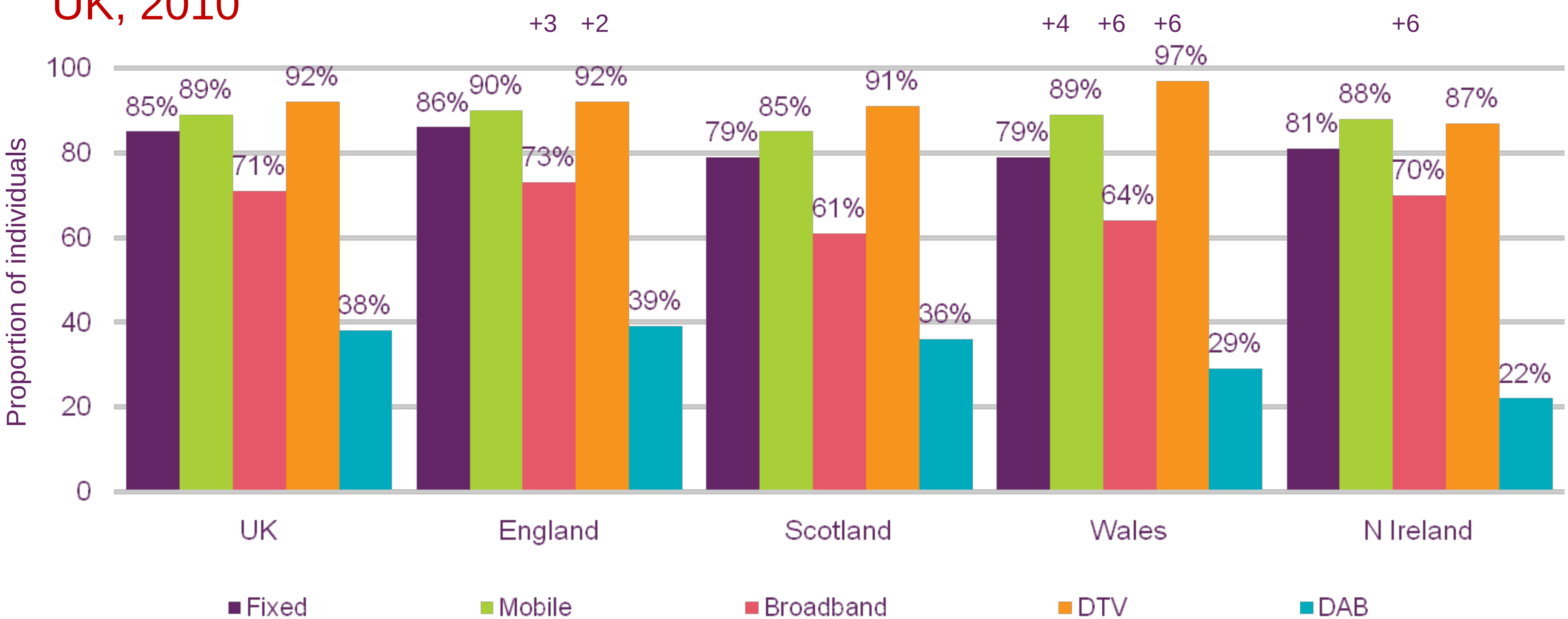
Coverage of 2G and 3G mobile services



Source: Ofcom / GSM Association / Europa Technologies; Q2 2010
Note: Map shows the number of 3G operators with at least 90% area coverage; not directly comparable to that published in the 2009 report.

Figure 1.69

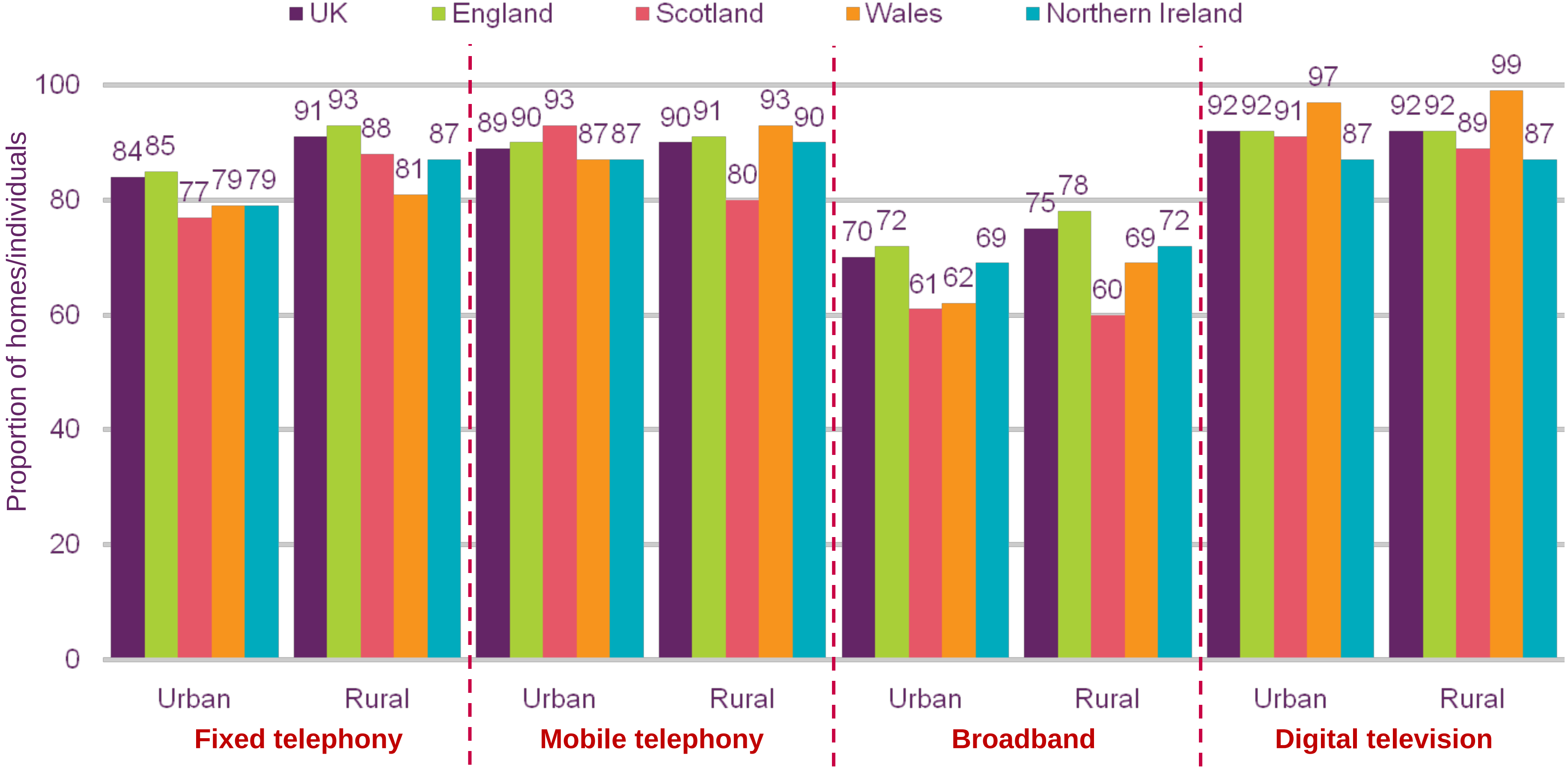
Patterns of communications service adoption across the nations of the UK, 2010



Source: Ofcom research, Q1 2010
Fixed line base: All adults aged 15+ (n = 9013 UK, 5709 England, 1468 Scotland, 1075 Wales, 761 Northern Ireland)
Fixed line question: Is there a landline phone in your home that can be used to make and receive calls?
DTV base: Adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 970 Wales, 640 Northern Ireland)
DTV question. Which, if any, of these types of television does your household use at the moment?
Broadband base: All adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 970 Wales, 640 Northern Ireland)
Broadband question: Which of these methods does your household use to connect to the internet at home?
DAB base: Adults aged 15+ who listen to radio (n= 7017 UK, 4476 England, 1034 Scotland, 854 Wales, 653 Northern Ireland)
DAB question: How many DAB sets do you have in your household? Response represents those with one or more sets.
Note: Remaining percentages are 'Don't know' responses
Mobile base: All adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 970 Wales, 640 Northern Ireland)
Mobile question: Do you personally use a mobile phone ?
Note: The DTV take-up figures in this chart will differ from those presented in the 'Fast facts' table. The different is explained by the base of households over which the two figures are calculated. In this chart, is it all homes with television; in the fast facts, it is all homes (including those that do not have a television).

Figure 1.70

Adoption of communications technology/services in urban and rural locations



Source: Ofcom research, Q1 2010. For questions see Figure 1.69.

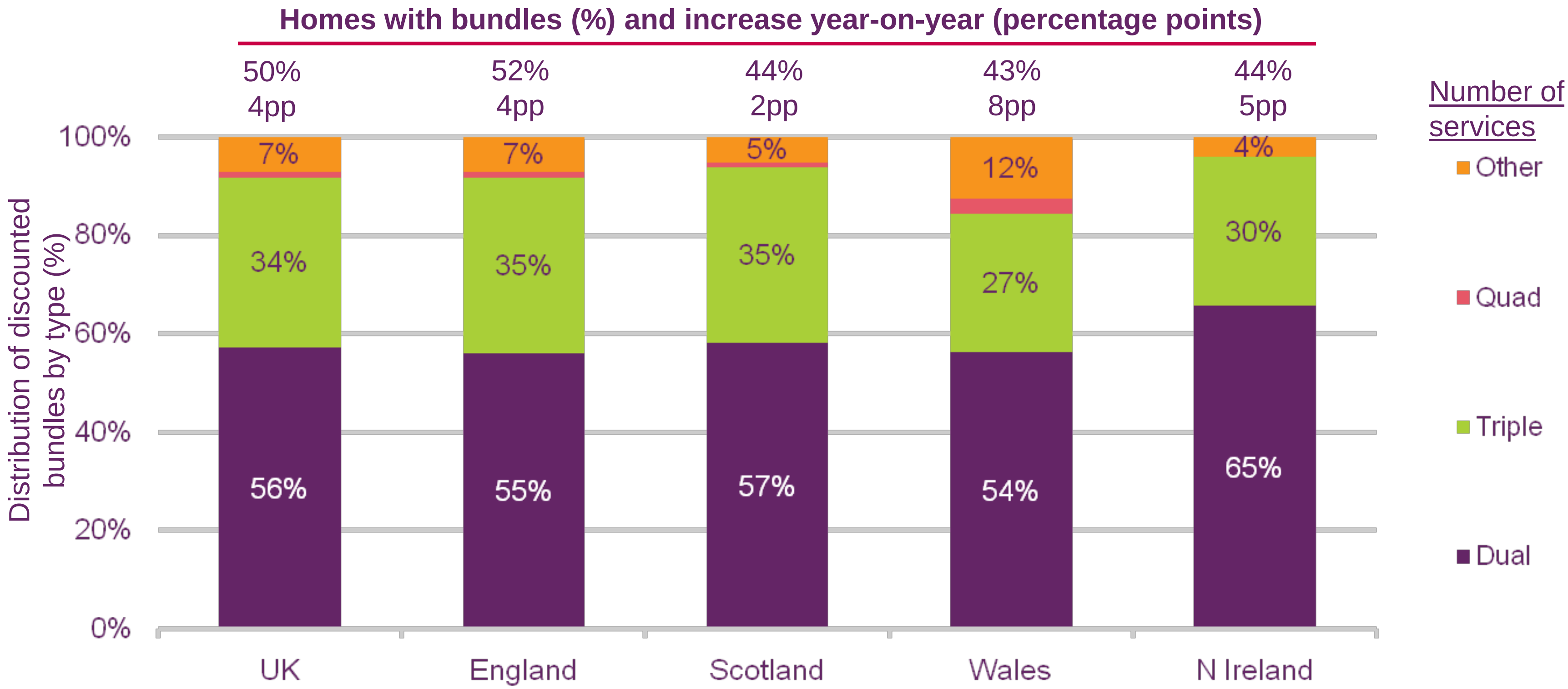
Figure 1.71

Mobile-only households in the UK

QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?
Source: Ofcom research, Quarter 1 2010
Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)

Figure 1.72

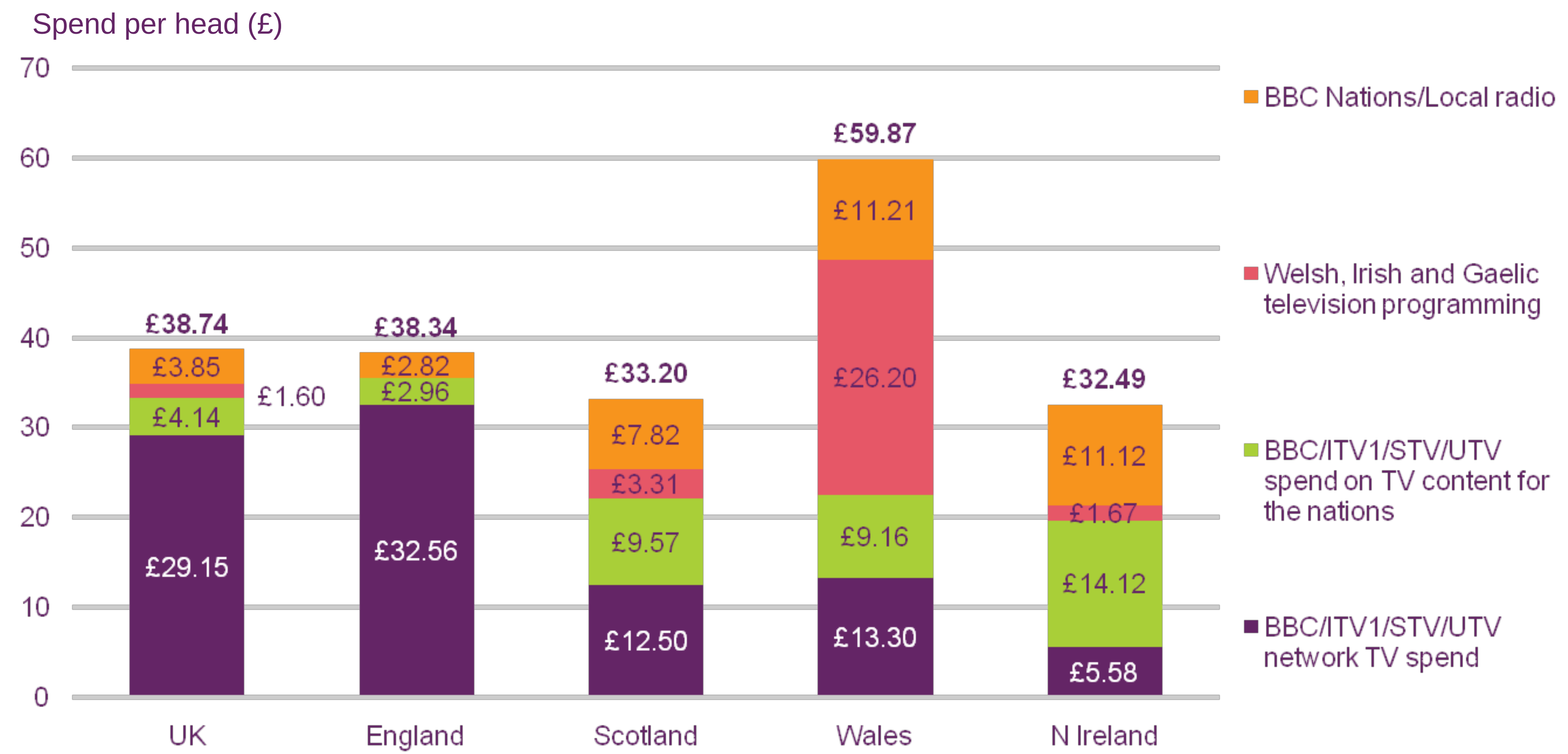
Take-up of bundles, by nation



Source: Ofcom research, Q1 2010
Base: All adults aged 15+ with a package of services regardless of whether or not these include a discount (n = 4167 UK, 2793 England, 605 Scotland, 437 Wales, 332 Northern Ireland)
Note: Remaining percentages are Don’t know responses

Figure 1.73

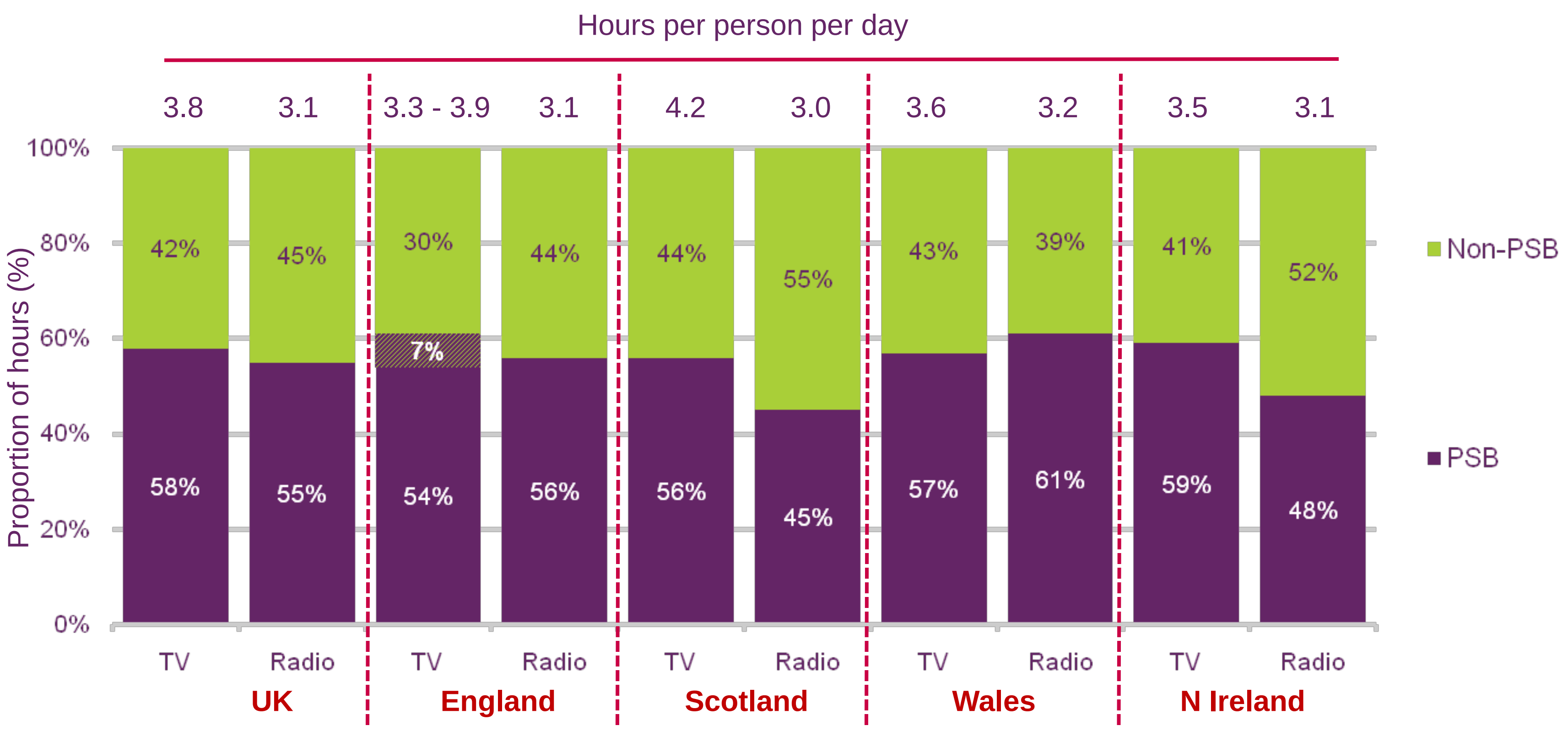
Spend per head on UK-originated content broadcast by PSBs on TV and radio, 2010



Source: Operators, Annual Reports and Ofcom calculations

Figure 1.74

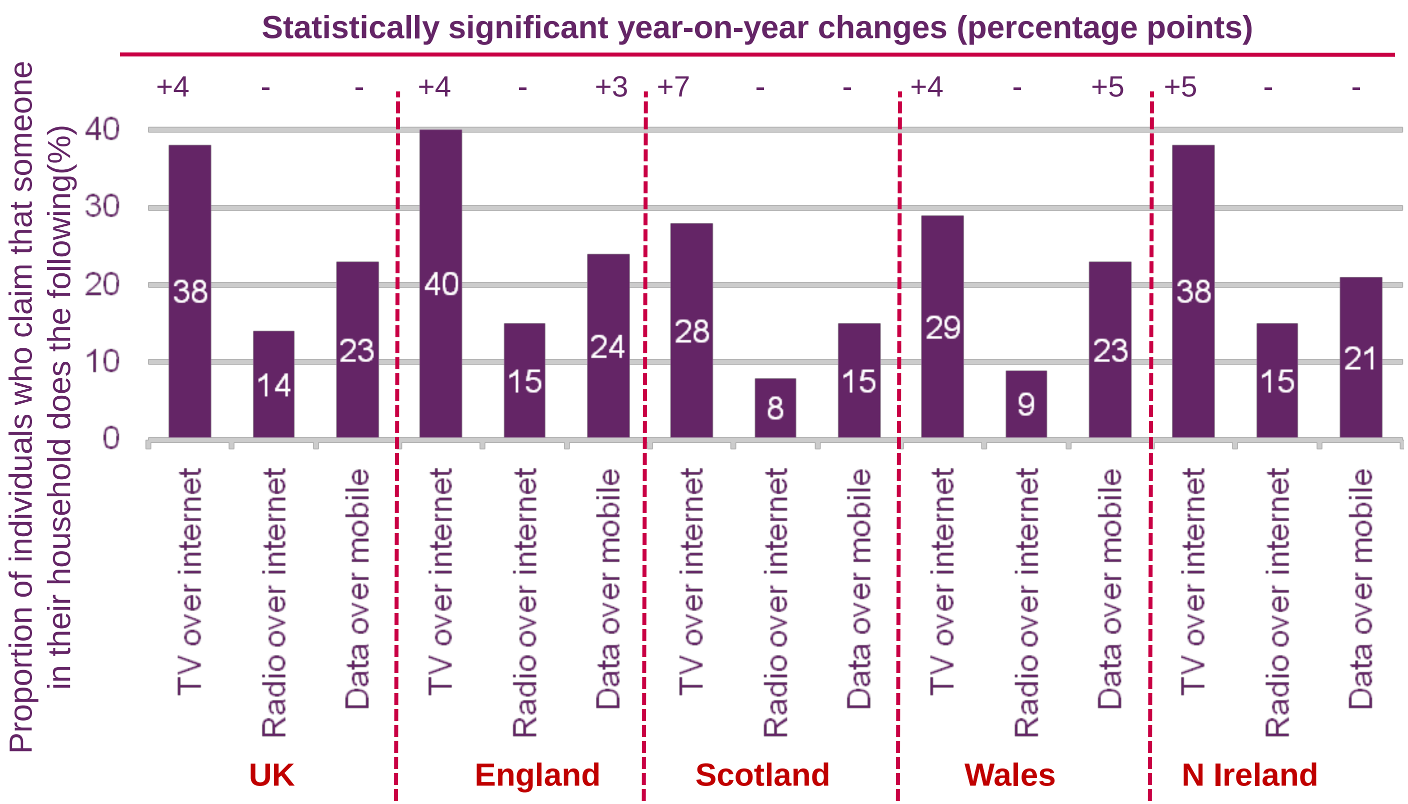
Hours of daily viewing of television and radio, by nation, 2010



Source: BARB and RAJAR

Figure 1.75

Consumers' use of converging platforms



Source: Ofcom research, Quarter 1 2010
Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland)
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-fi,, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging