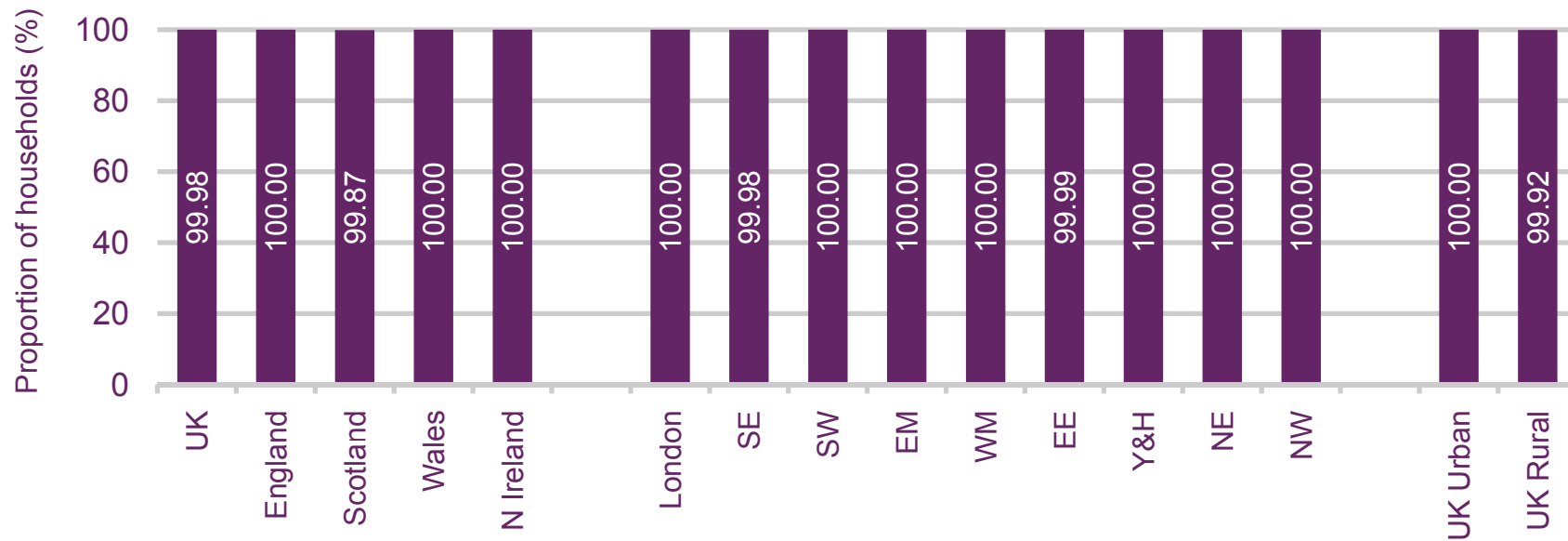


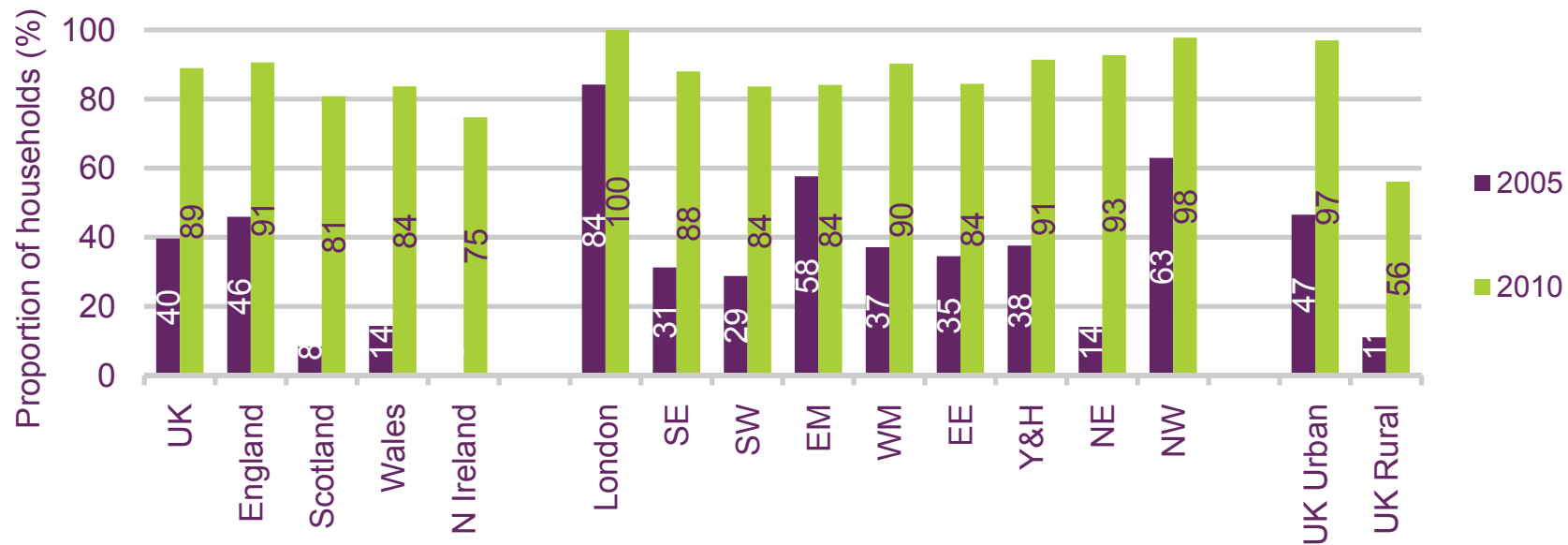
# Telecoms and networks

## Proportion of households connected to an ADSL-enabled BT exchange



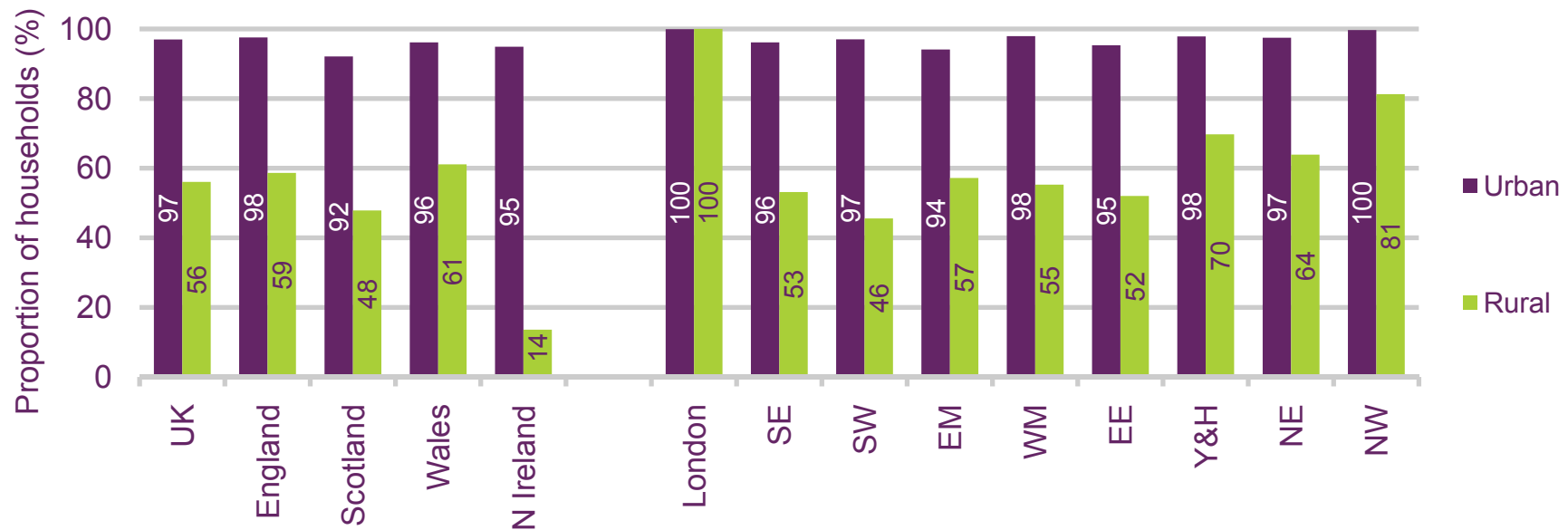
Source: Ofcom / BT, December 2010 data

## Proportion of households in connected to an unbundled local exchange



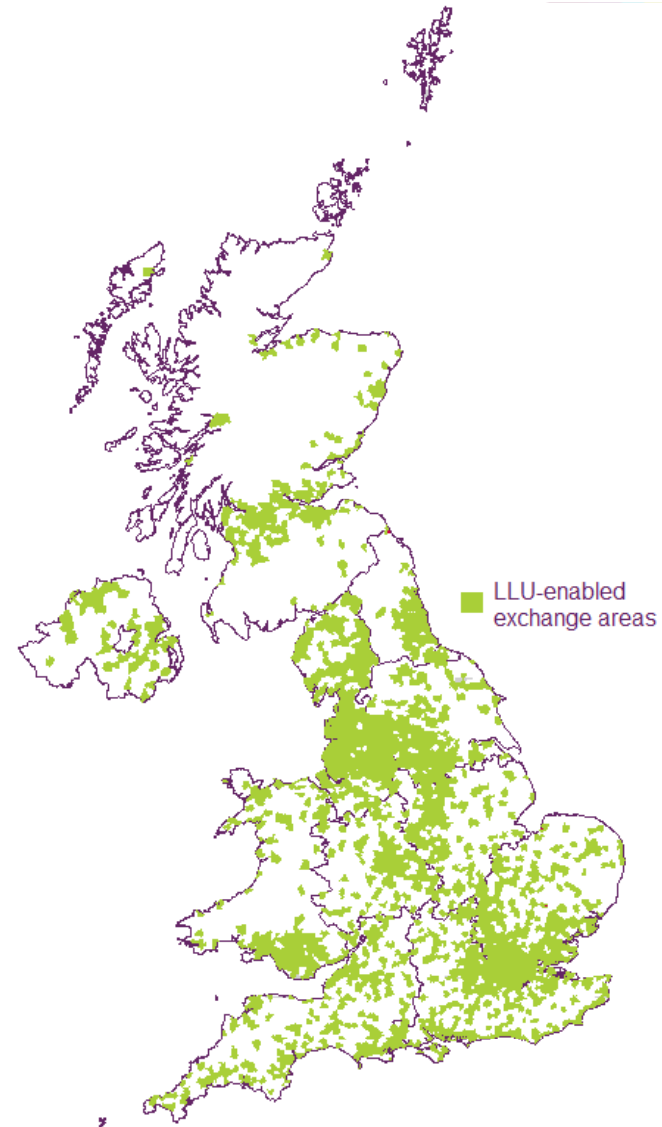
Source: Ofcom / BT, December 2010 data

## Proportion of households in urban and rural areas connected to an unbundled exchange



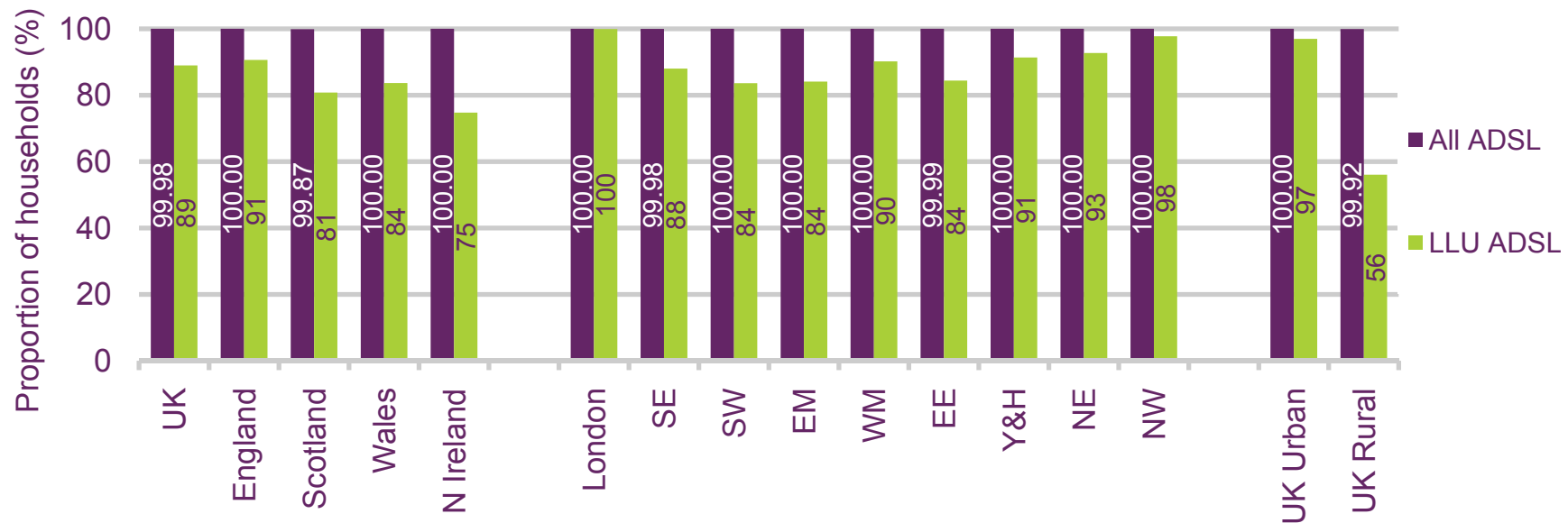
Source: Ofcom / BT, December 2010 data

## Map showing areas served by unbundled local exchanges



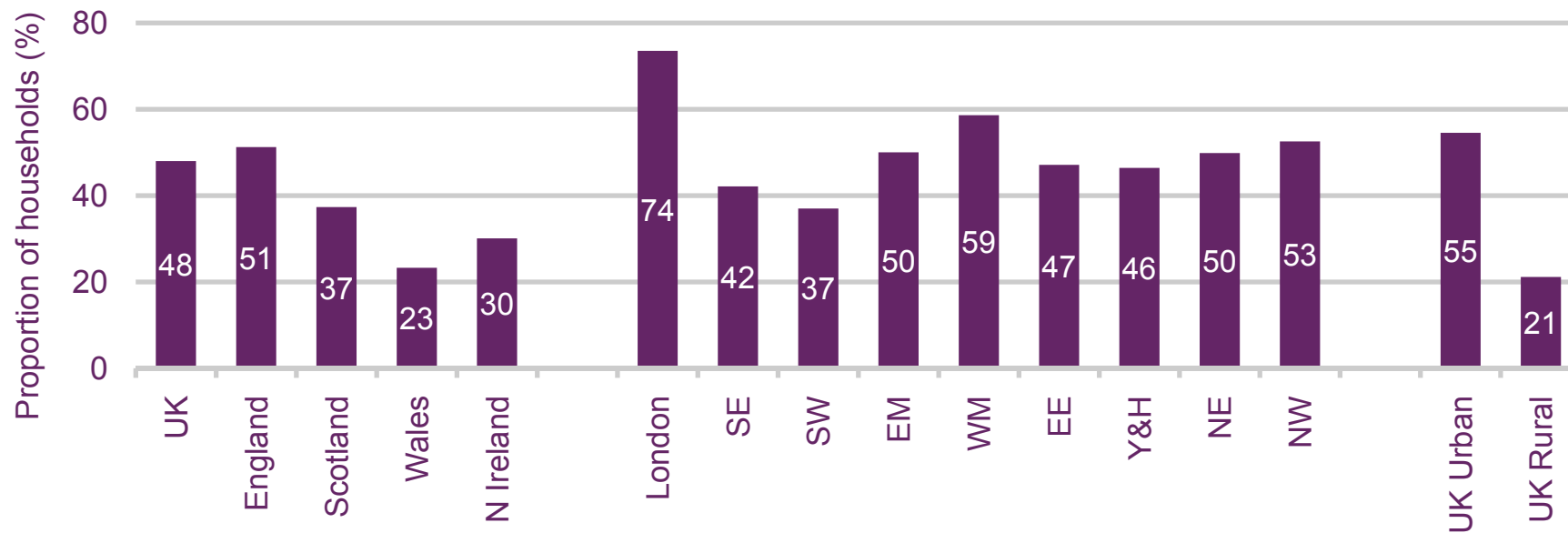
Source: Ofcom/BT, December 2010 data

## Proportion of homes connected to ADSL-enabled and unbundled exchanges



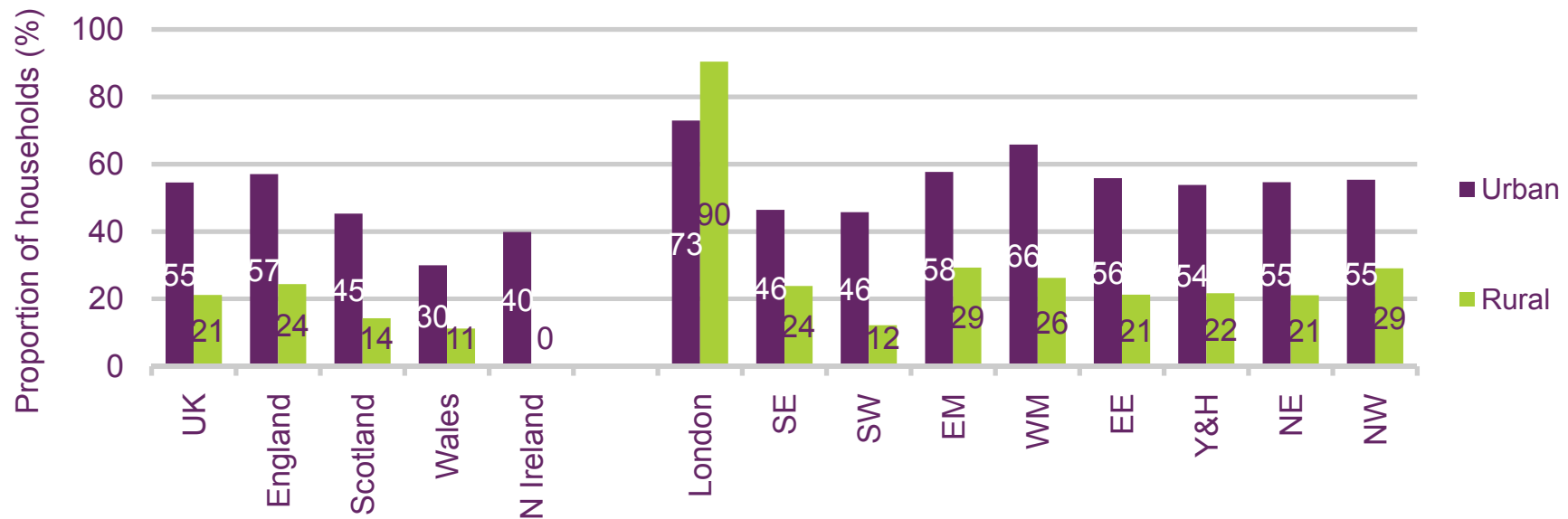
Source: Ofcom / BT, December 2010 data

## Proportion of households passed by Virgin Media broadband



Source: Ofcom / Virgin Media, June 2010 data

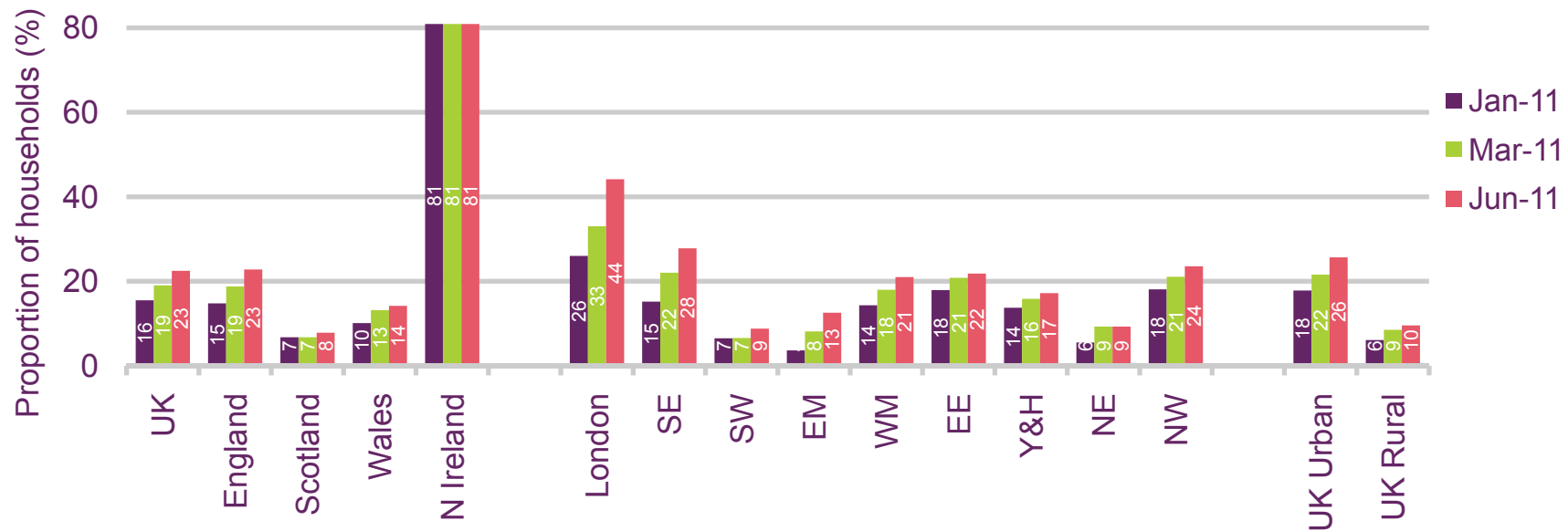
## Proportion of households in urban and rural areas passed by Virgin Media broadband



Source: Ofcom/Virgin Media, June 2010 data

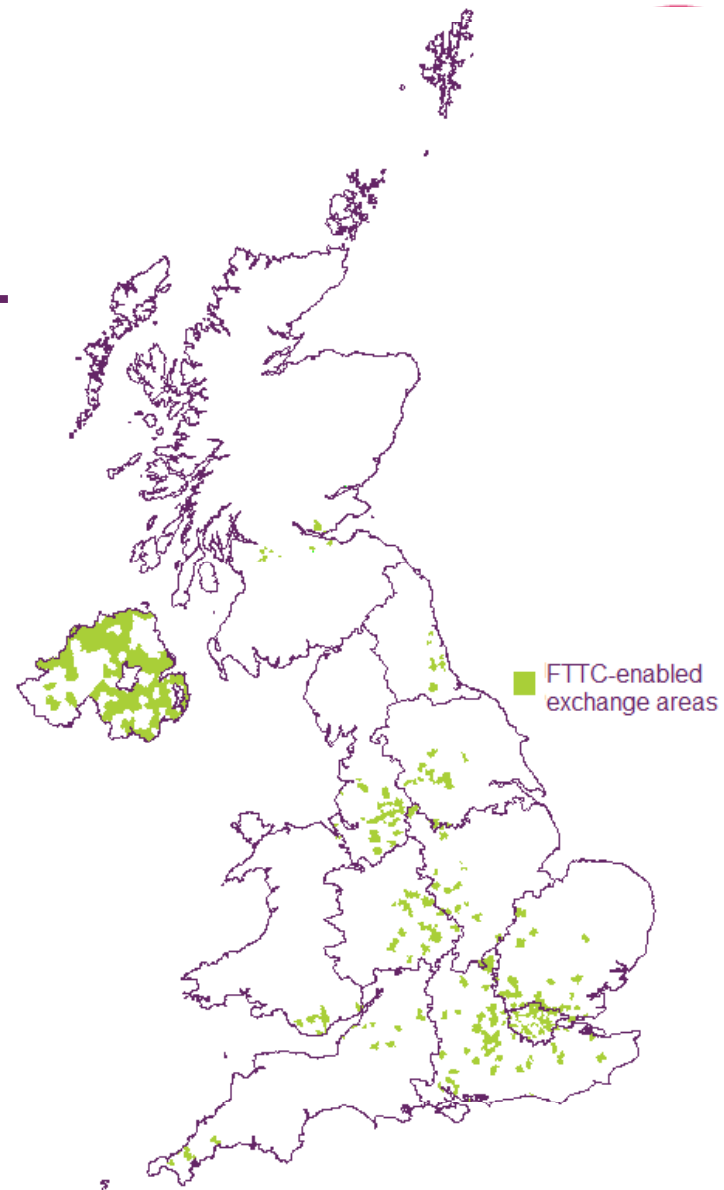


## Proportion of households connected to an FTTC-enabled exchange



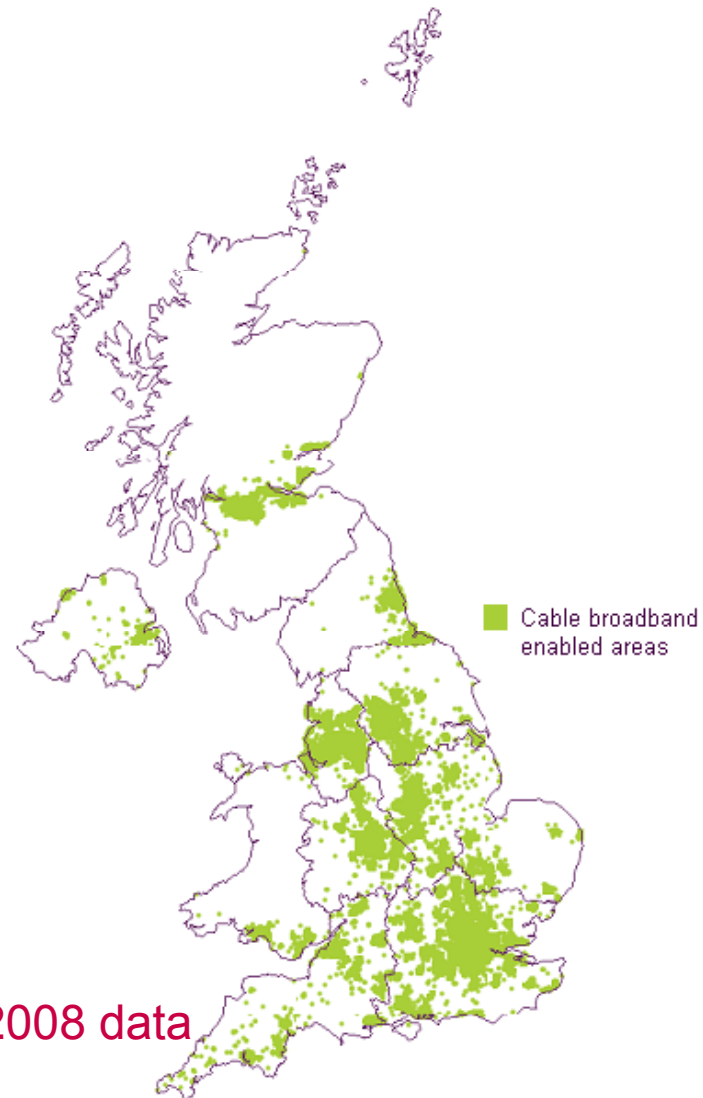
Source: Ofcom / BT

## Map of FTTC-enabled BT exchange areas



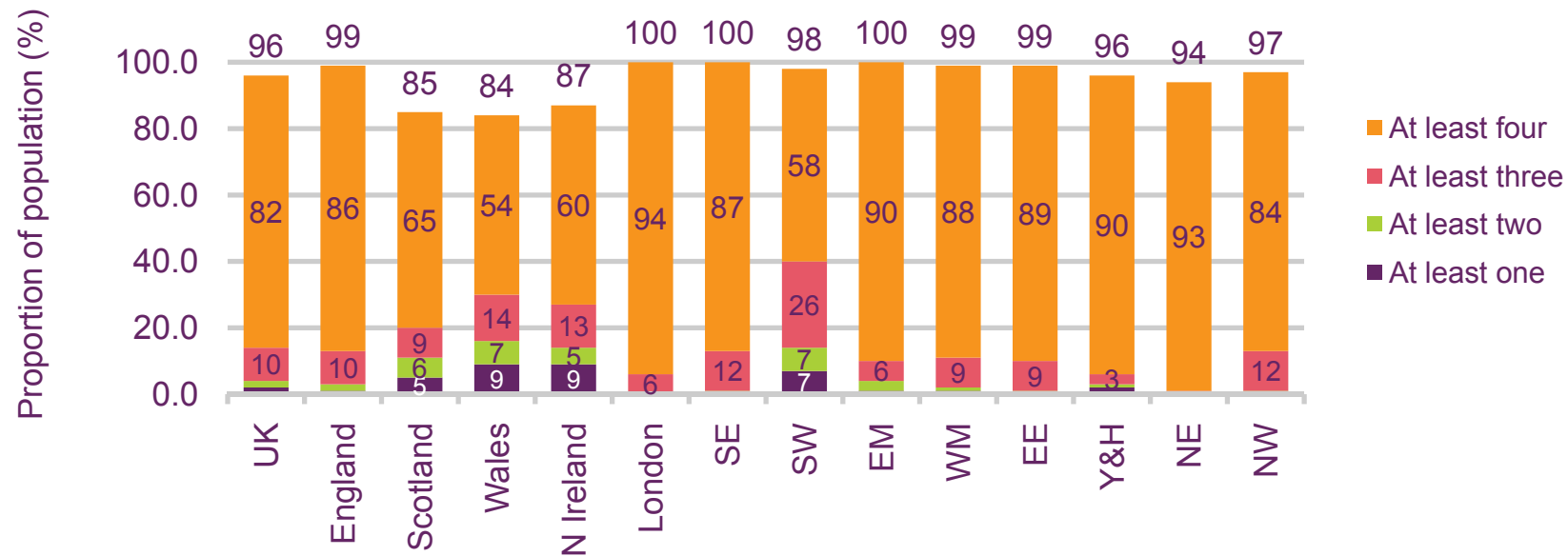
Source: Ofcom / BT, June 2011 data

## Map of the availability of Virgin Media cable broadband



Source: Ofcom/Virgin Media, September 2008 data

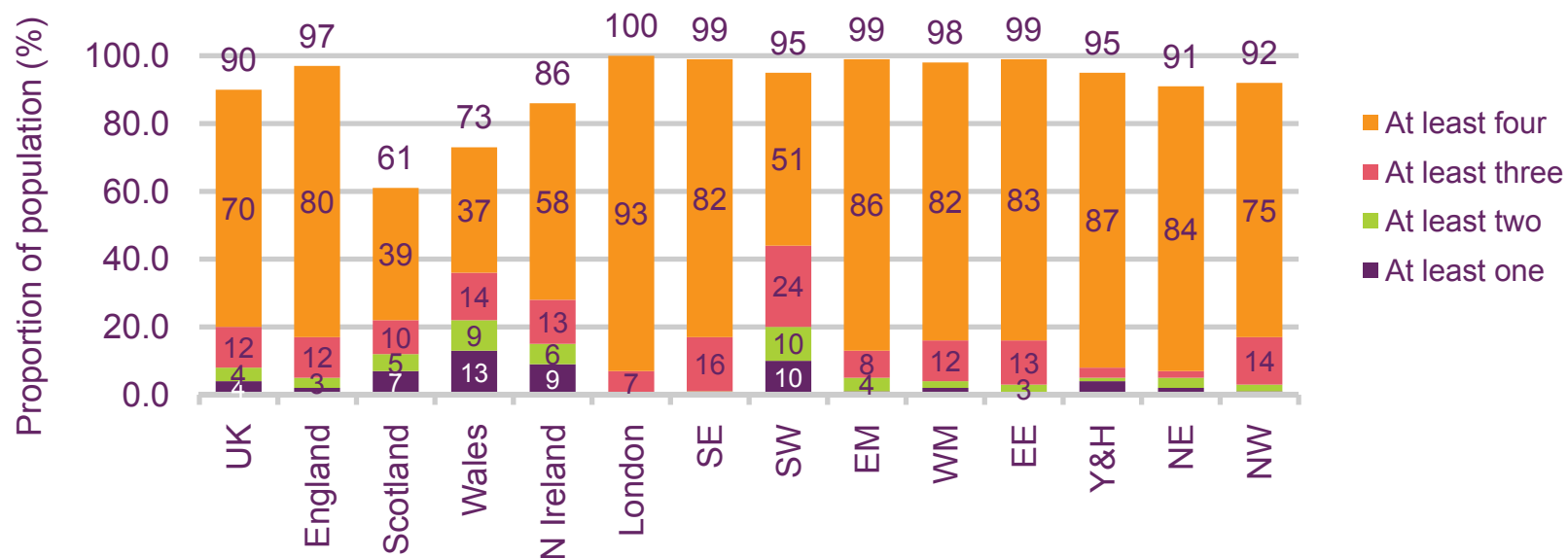
## 2G mobile phone population coverage (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 2G area coverage; data not directly comparable to that published in the 2010 report.

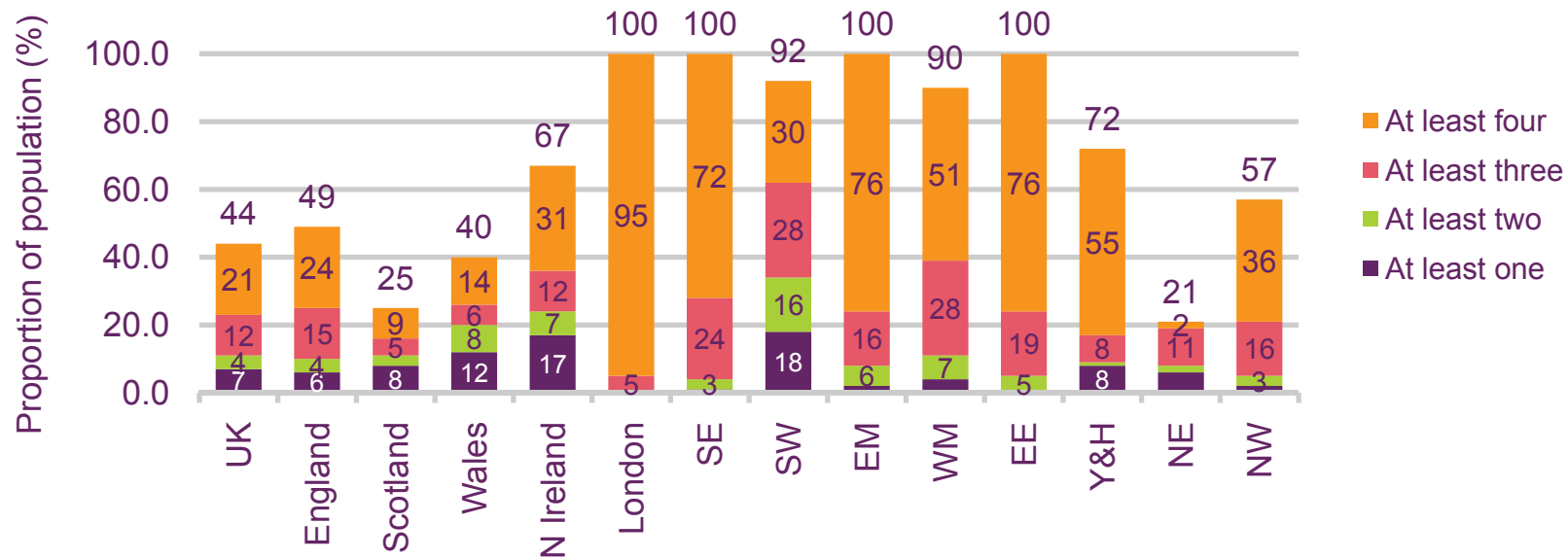
## 2G mobile phone geographic coverage by postcode (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 2G area coverage; data not directly comparable to that published in the 2010 report.

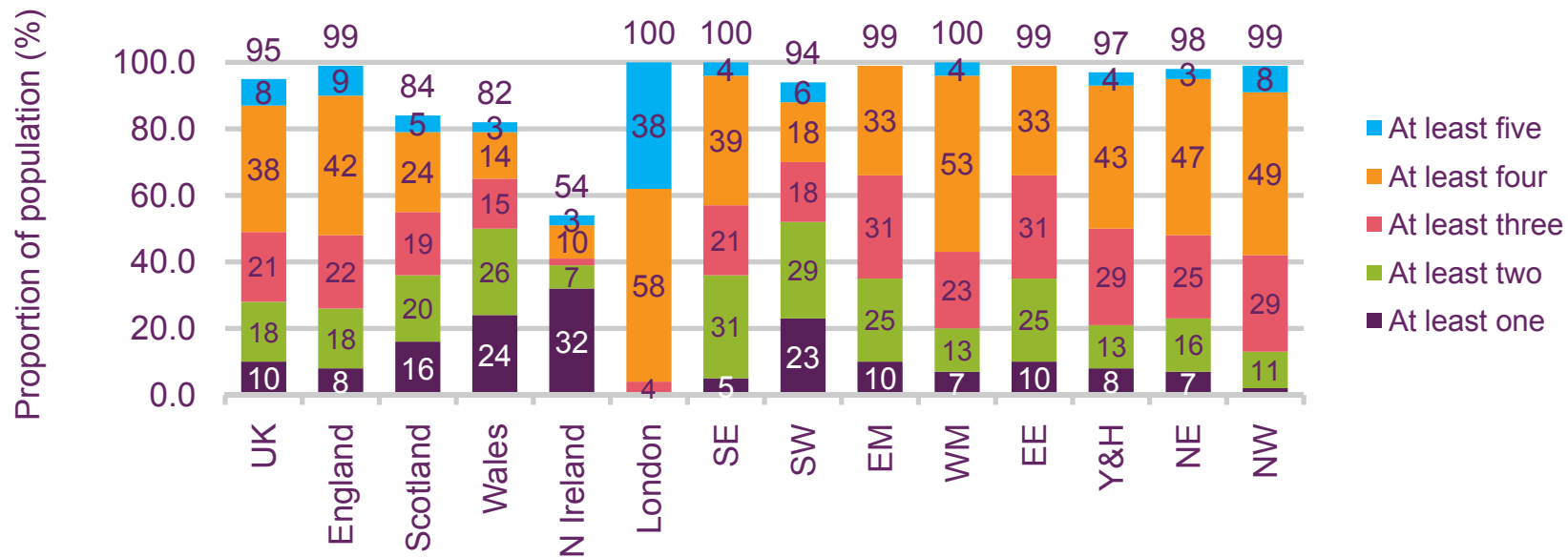
## 2G mobile phone geographic coverage by land mass (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of land mass (based on km<sup>2</sup> units) where at least one operator had at least 90% 2G area coverage.

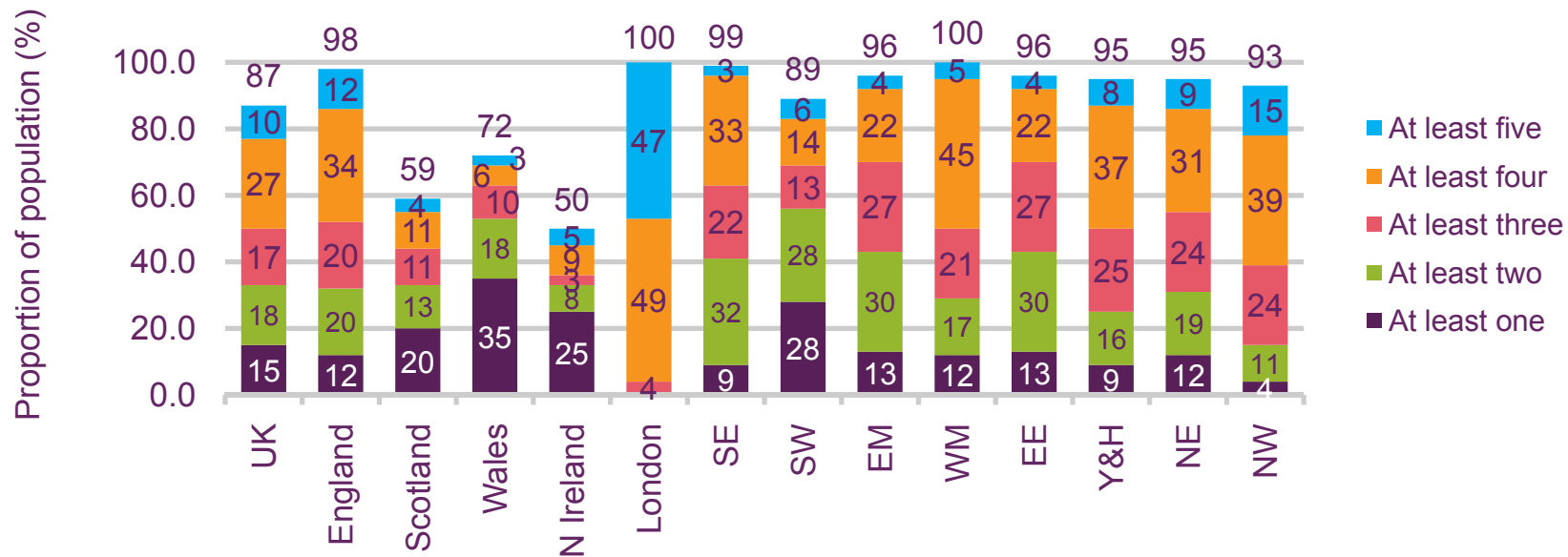
## 3G mobile phone population coverage (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 3G area coverage; data not directly comparable to that published in the 2010 report.

## 3G mobile phone geographic coverage by postcode (90%) – by number of operators

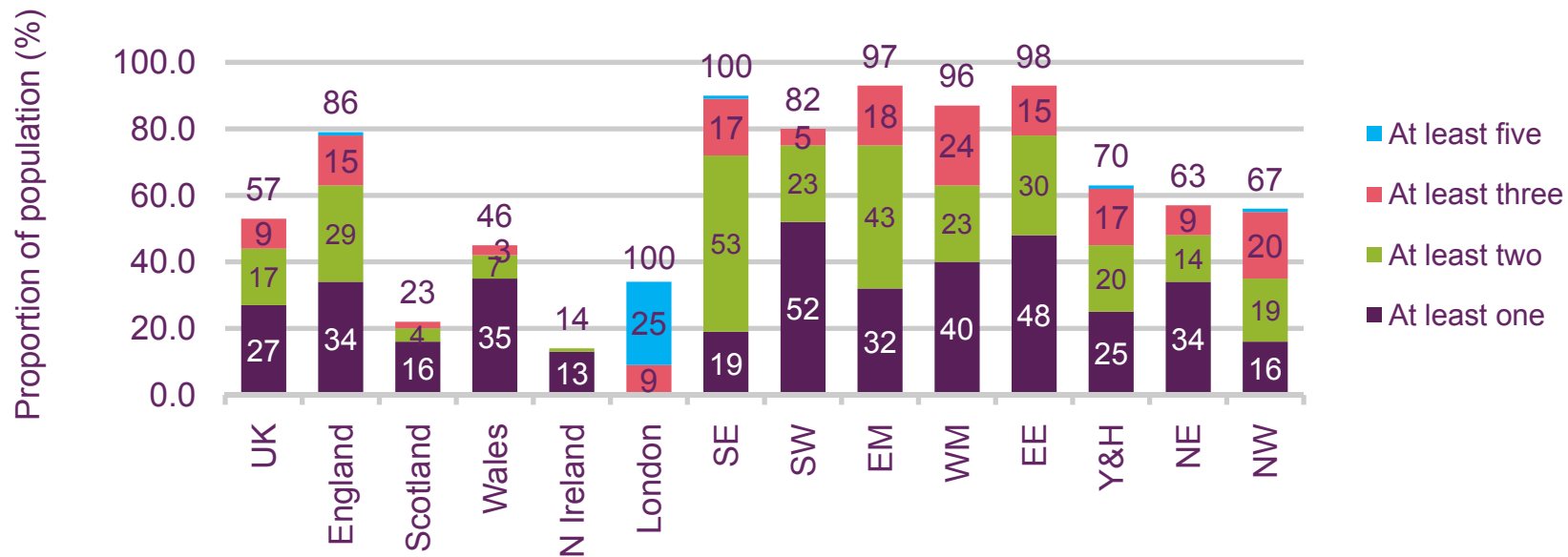


Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 3G area coverage; data not directly comparable to that published in the 2010 report.



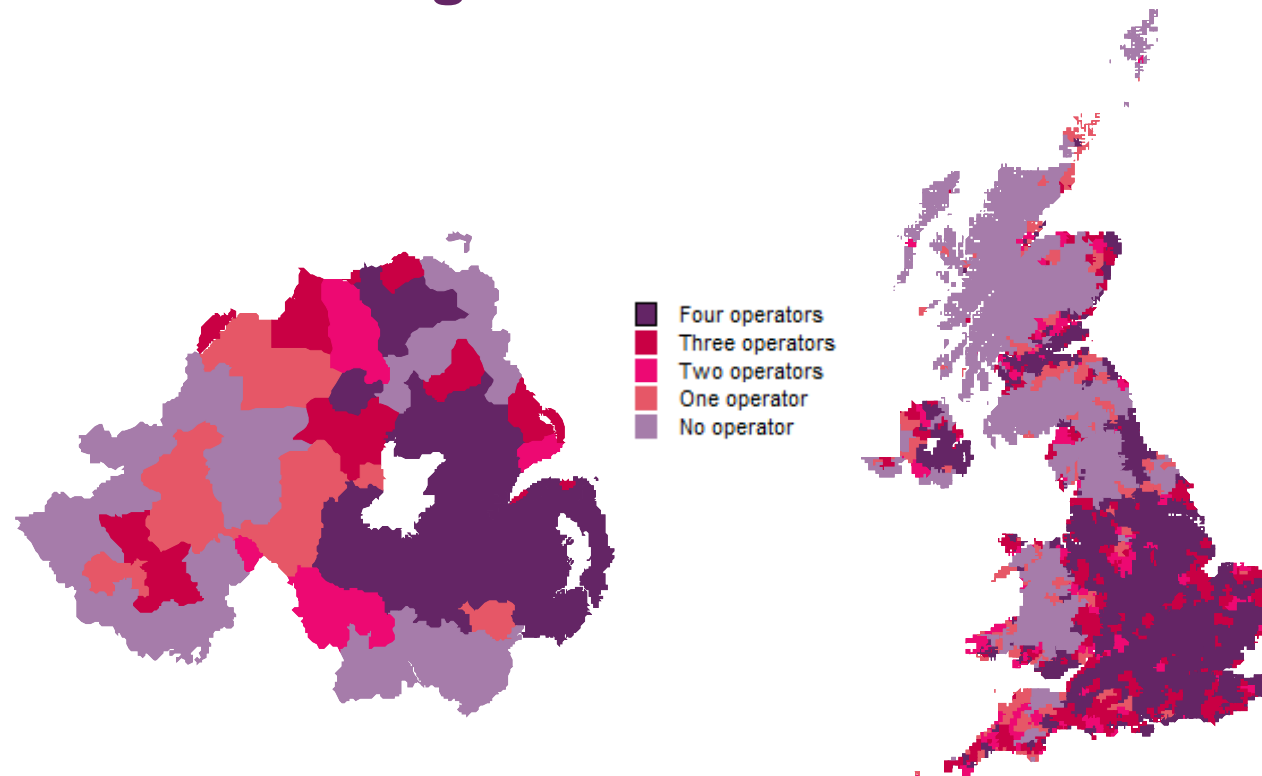
## 3G mobile phone geographic coverage by land mass (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of land mass (based on km<sup>2</sup> units) where at least one operator had at least 90% 3G area coverage

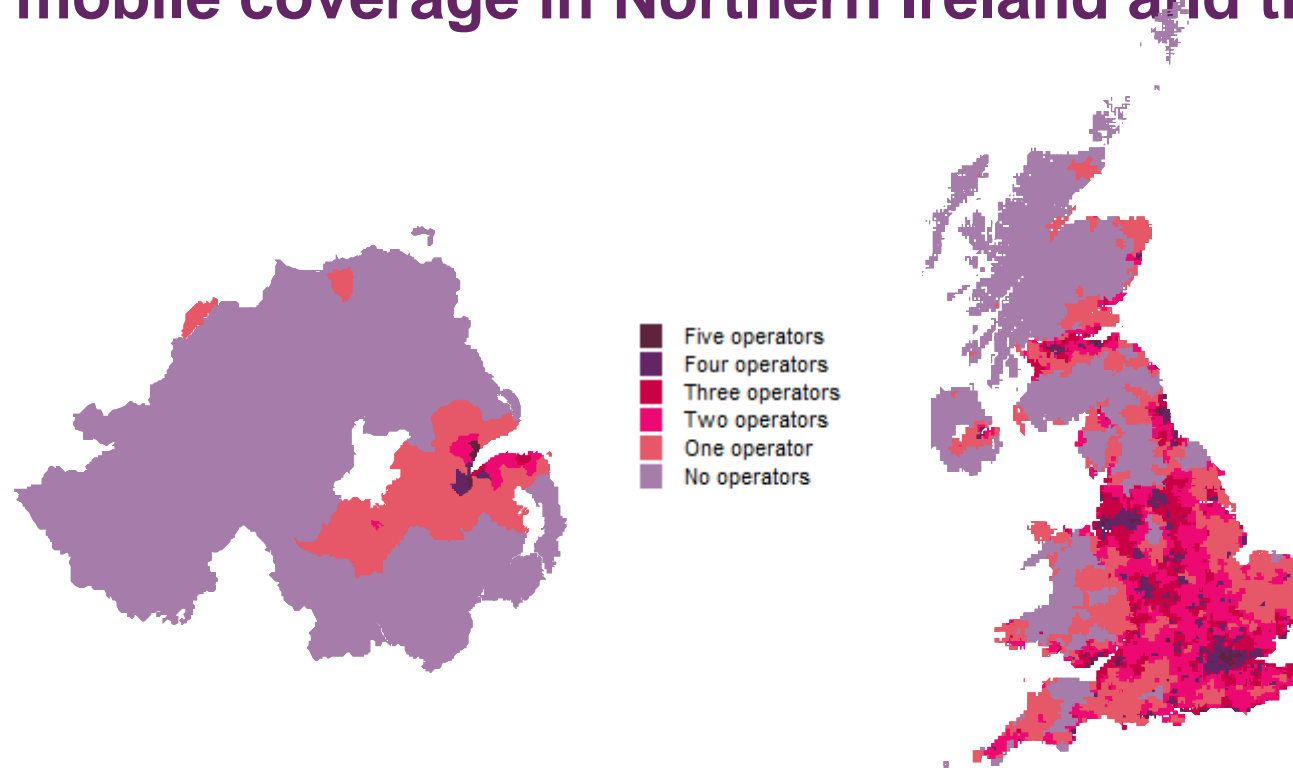
## 2G mobile coverage in Northern Ireland and the UK



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Map shows the number of 2G operators with at least 90% geographic coverage by postcode area; not directly comparable to that published in the 2011 report

## 3G mobile coverage in Northern Ireland and the UK



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Map shows the number of 3G operators with at least 90% geographic coverage by postcode area; not directly comparable to that published in the 2011 report

## Take-up of communications services, 2011

	UK	N Ireland	England	Scotland	Wales	NI urban	NI rural
<b>Individual</b>							
<b>Voice telephony</b> Fixed Line	<b>85%</b>	84%	85%	80%	80%	83%	87%
Mobile	<b>91%</b>	92%	92%	86%	87%	91%	92%
<b>Internet</b> PC	<b>77%</b>	78%	78%	65%	74%	78%	80%
Total Internet	<b>76%</b>	76%	78%	64%	72%	76%	75%
Broadband (fixed and mobile)	<b>74%</b>	75%	76%	61%	71%	75%	74%
Fixed Broadband	<b>67%</b>	67%	68%	57%	65%	67%	67%
Mobile Broadband	<b>17%</b>	13%	18%	9%	16%	15%	10%

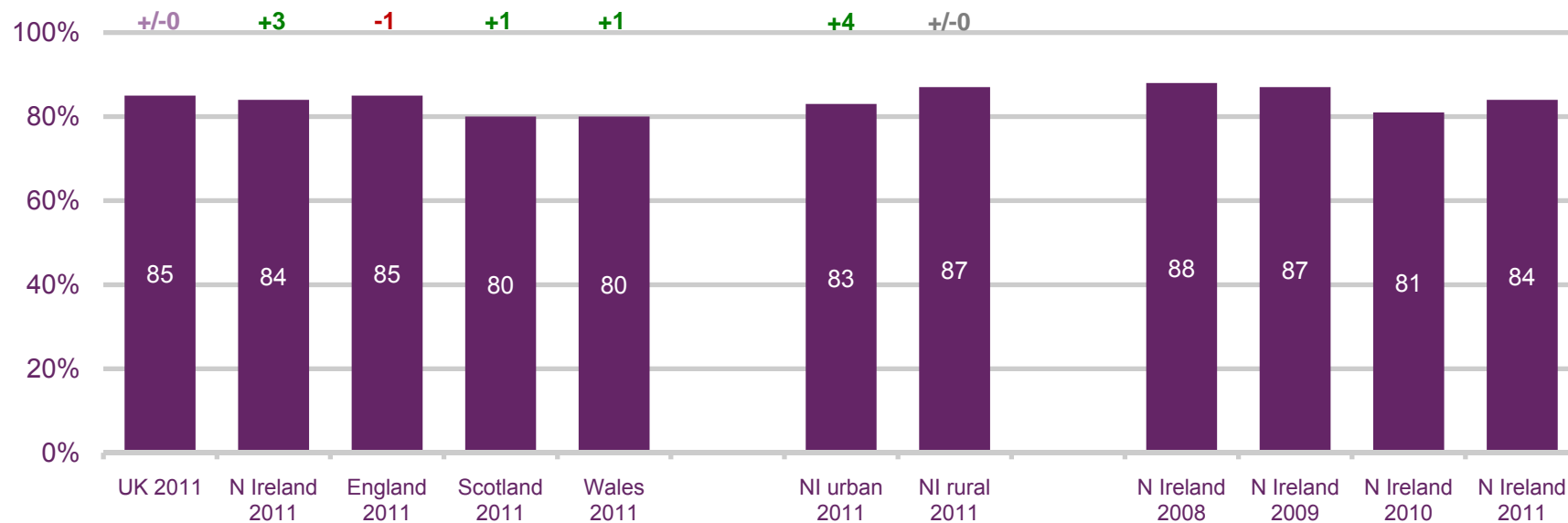
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QE9. Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural)

# Fixed line take-up

Figure above bar shows % point change in fixed line take-up from Q1 2010



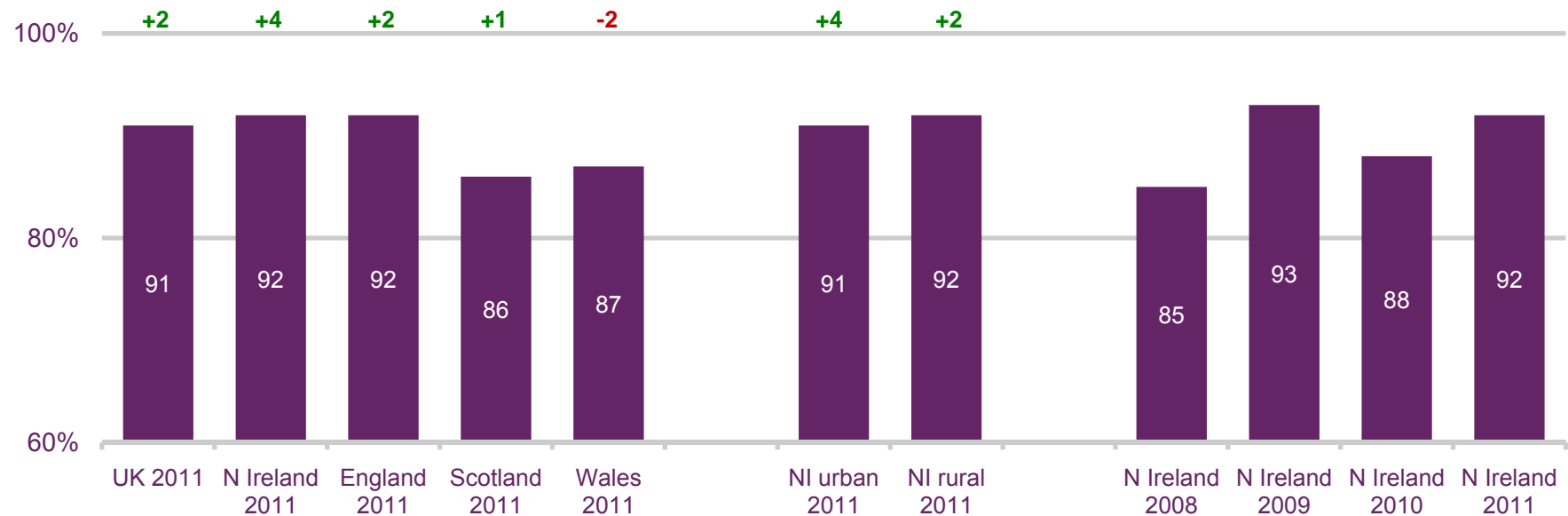
QC1. Is there a landline phone in your home that can be used to make and receive calls?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011)

# Mobile take-up

Figure above bar shows % point change in use of mobile phones from Q1 2010



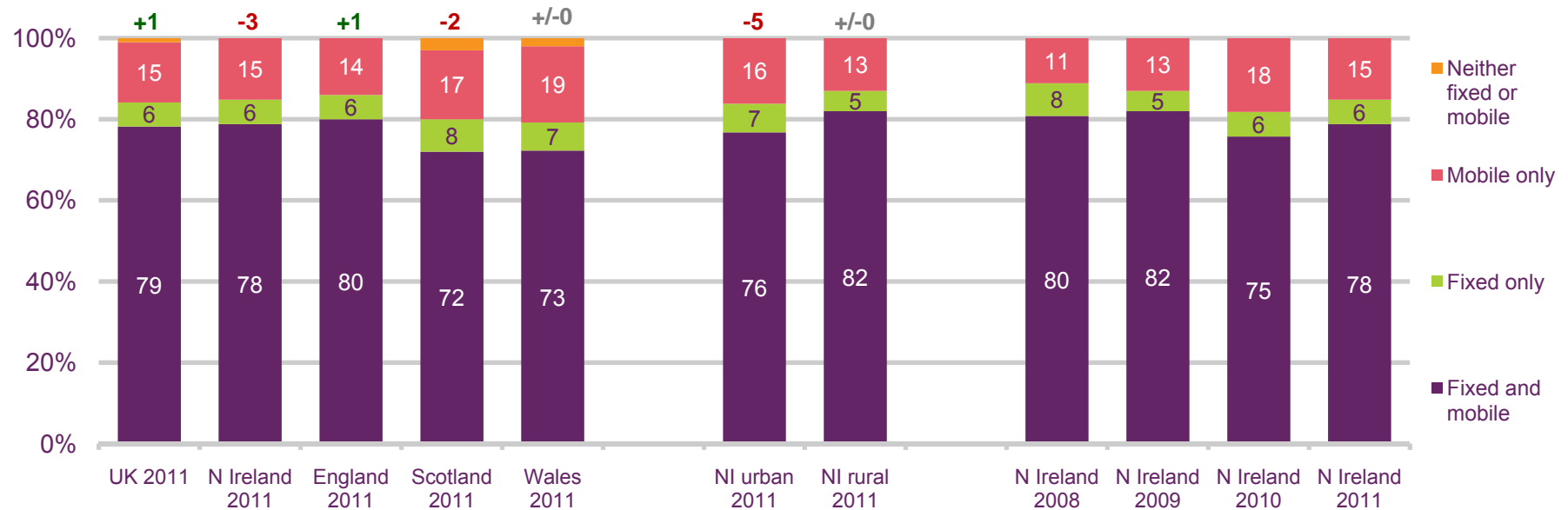
QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011)

# Cross-ownership of household telephony services

Figure above bar shows % point change in mobile only from Q1 2010



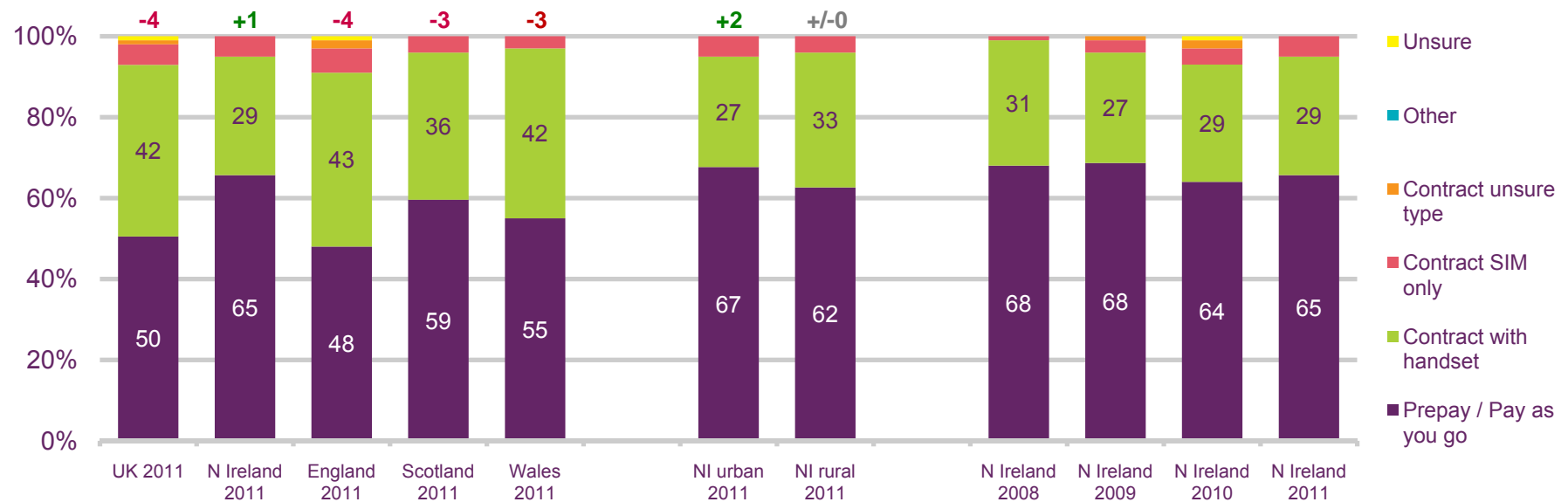
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011)

# Type of mobile subscription

Figure above bar shows % point change in prepay from Q1 2010



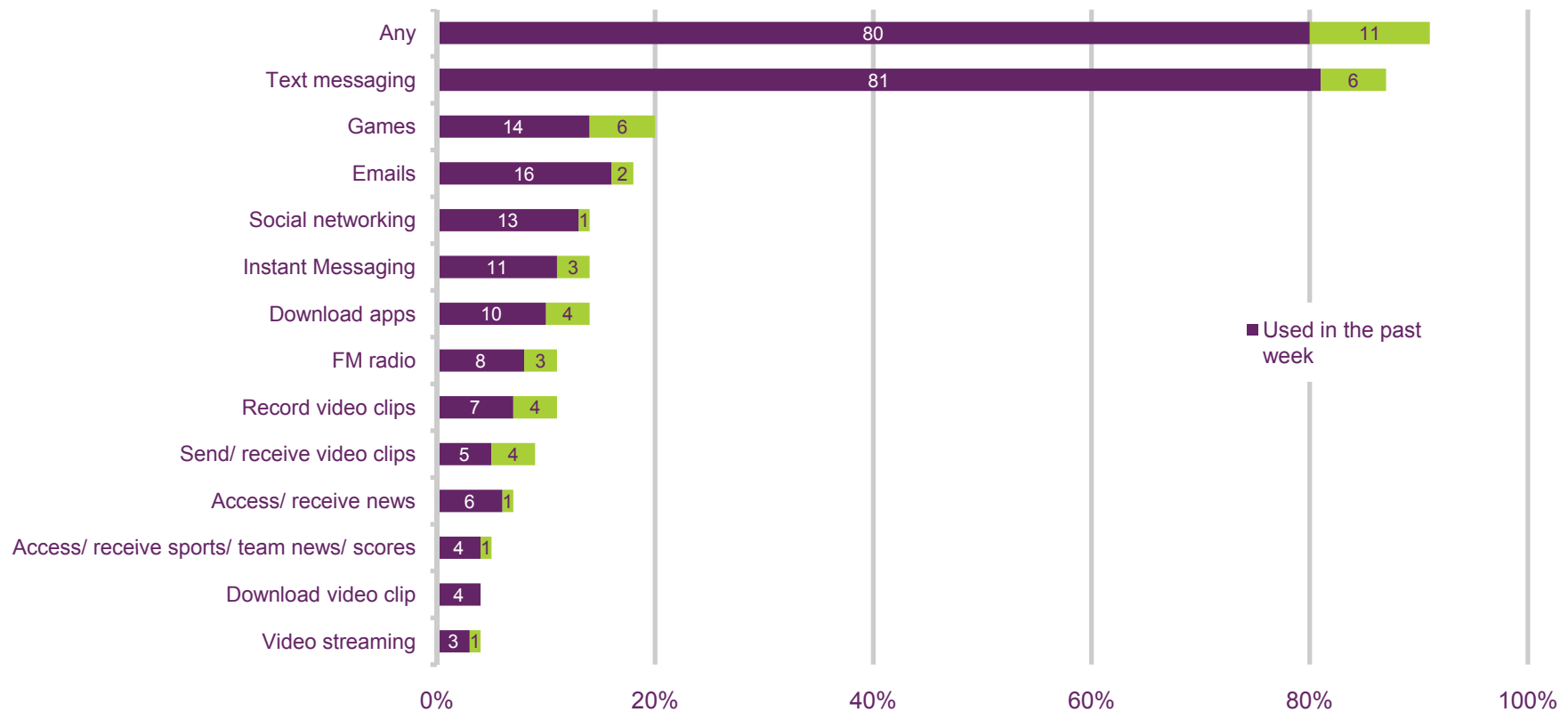
QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 425 Scotland, 1786 England, 416 Wales, 464 Northern Ireland, 205 Northern Ireland urban, 220 Northern Ireland rural, 744 Northern Ireland 2008, 877 Northern Ireland 2009, 1237 Northern Ireland 2010, 425 Northern Ireland 2011)



## Use of mobile applications

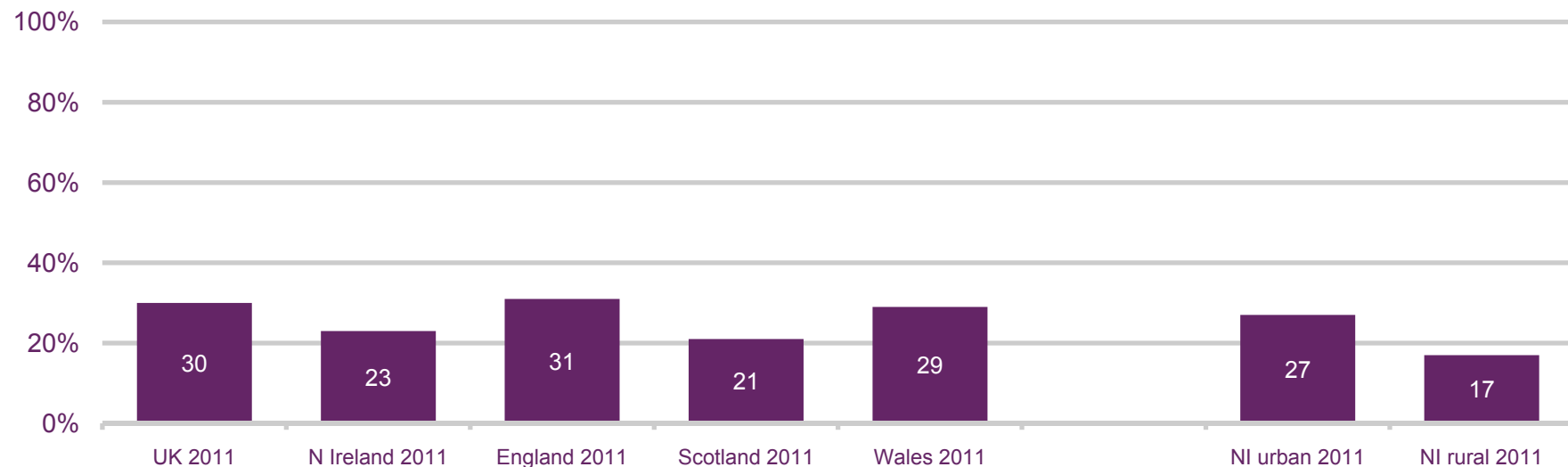


QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n= 464 Northern Ireland 2011)

## Take-up of smartphones



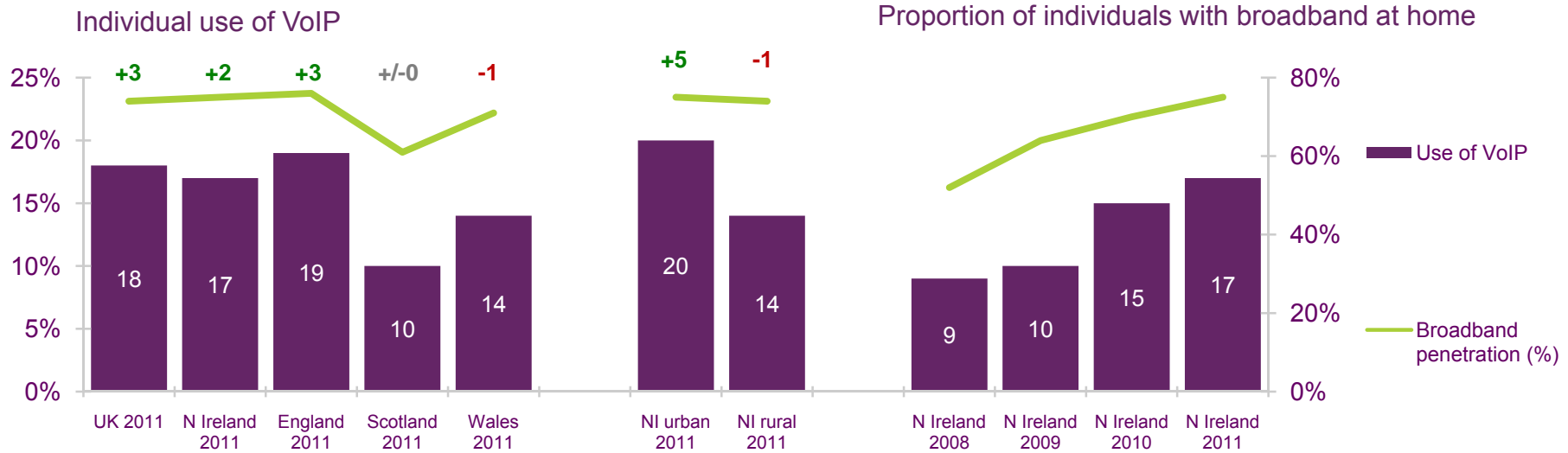
QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the HTC Desire.

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 464 Northern Ireland, 1786 England, 425 Scotland, 416 Wales, 234 Northern Ireland urban, 230 Northern Ireland rural)

# Individual use of Voice over IP

Figure above bar shows % point change in current use of VoIP from Q1 2010

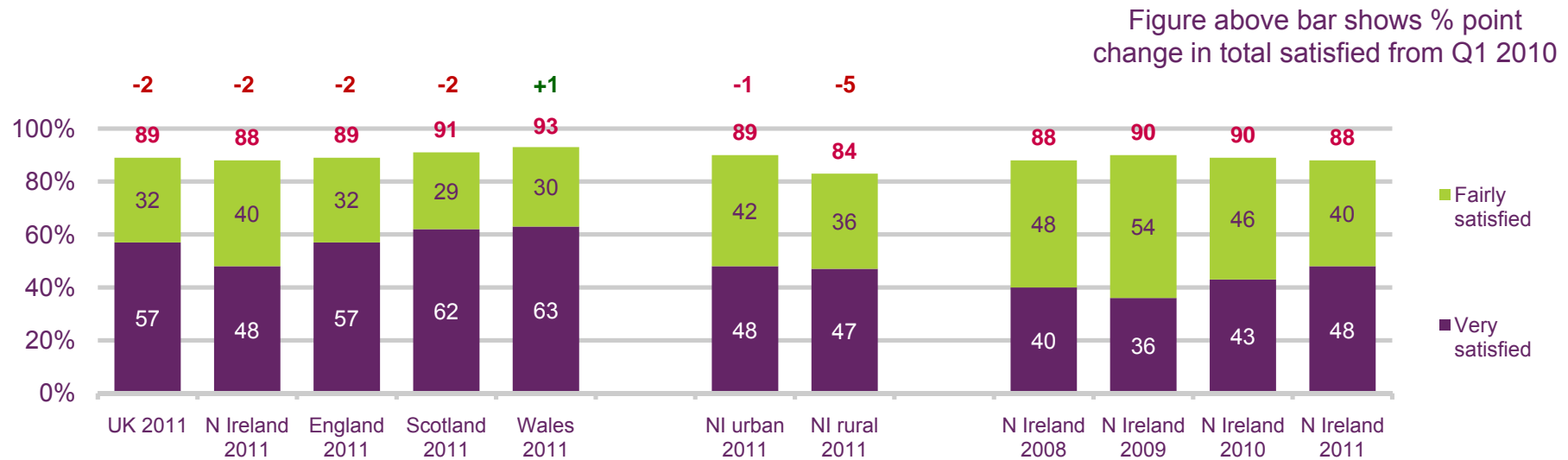


QE29. Before now, were you aware that you could make voice calls using the internet?/ QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 511 Northern Ireland, 1983 England, 487 Scotland, 493 Wales, 259 Northern Ireland urban, 252 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011)

## Overall satisfaction with fixed line services



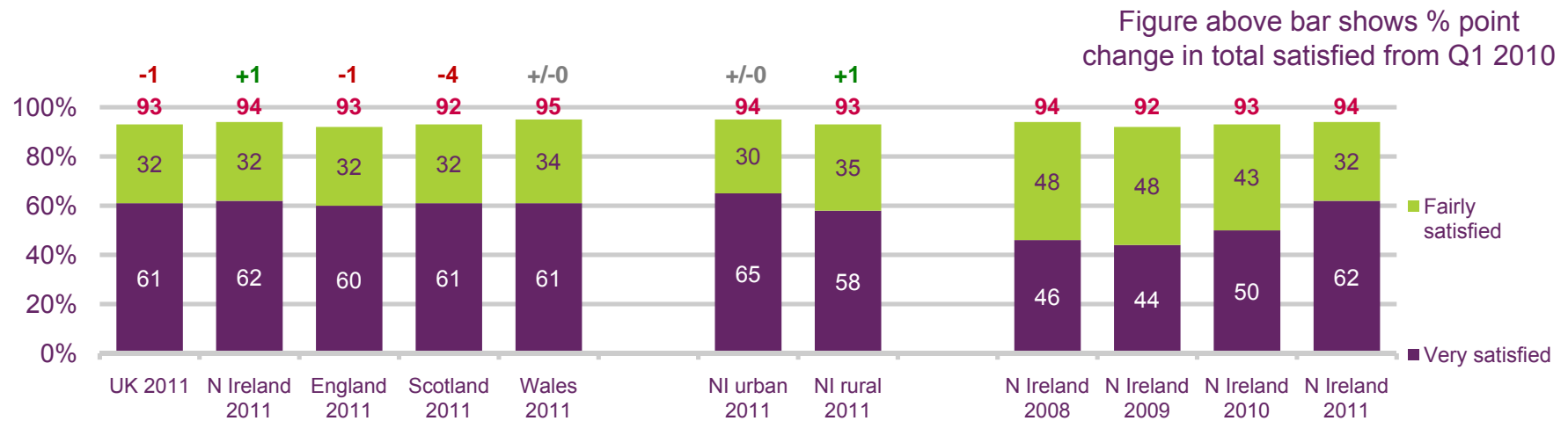
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

B Base: Adults aged 16+ with a landline phone at home (n = 2943 UK, 434 Northern Ireland, 1707 England, 400 Scotland, 402 Wales, 215 Northern Ireland urban, 219 Northern Ireland rural, 530 Northern Ireland 2008, 567 Northern Ireland 2009, 628 Northern Ireland 2010, 434 Northern Ireland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed line service

## Overall satisfaction with mobile phone service



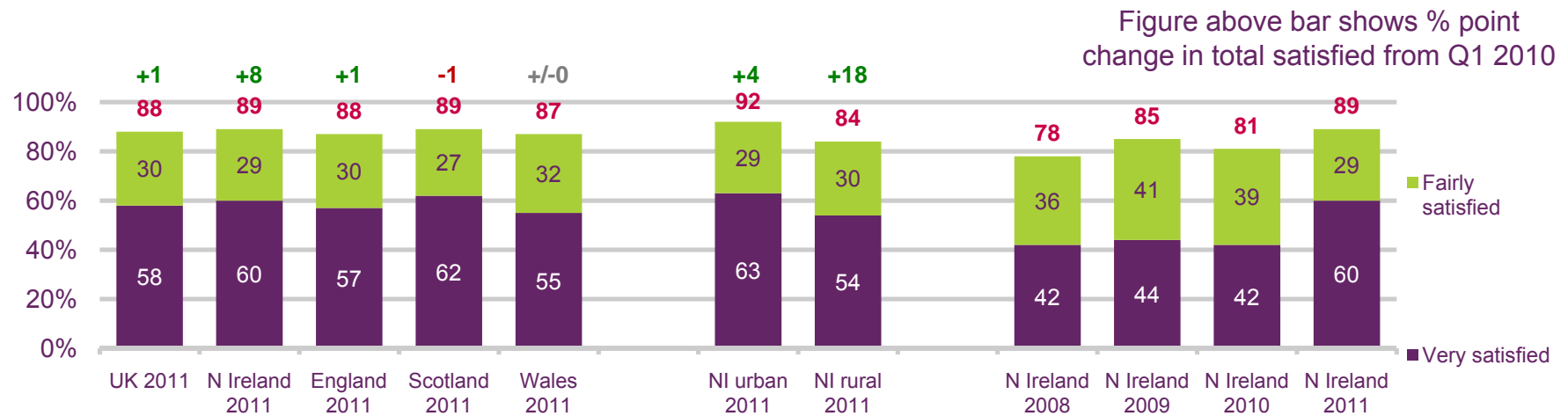
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 464 Northern Ireland, 1786 England, 425 Scotland, 416 Wales, 234 Northern Ireland urban, 230 Northern Ireland rural, 527 Northern Ireland 2008, 587 Northern Ireland 2009, 658 Northern Ireland 2010, 464 Northern Ireland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall mobile service

# Satisfaction with reception of mobile service



QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

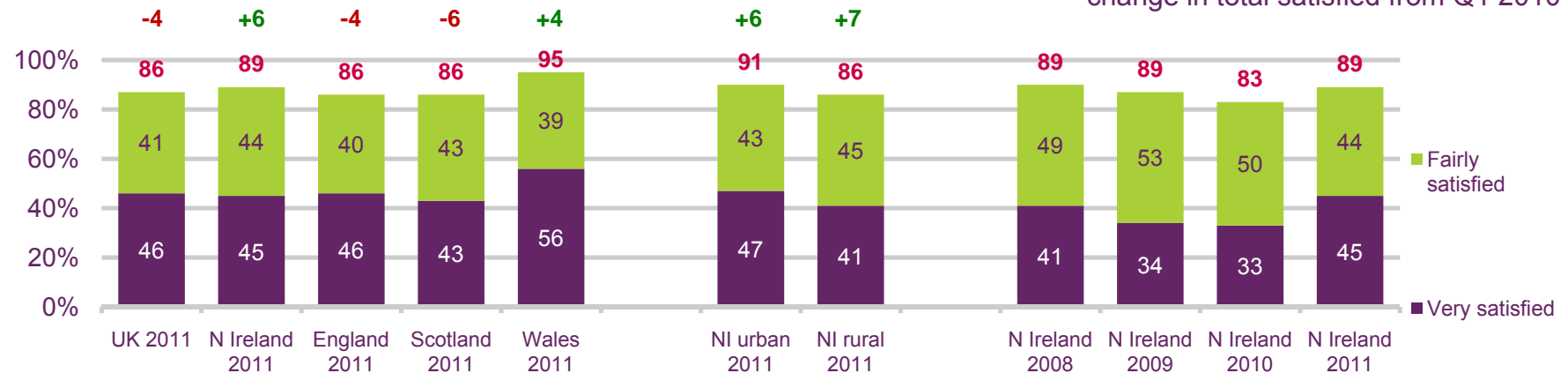
Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 464 Northern Ireland, 1786 England, 425 Scotland, 416 Wales, 234 Northern Ireland urban, 230 Northern Ireland rural, 527 Northern Ireland 2008, 587 Northern Ireland 2009, 658 Northern Ireland 2010, 464 Northern Ireland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their mobile reception

## Overall satisfaction with fixed broadband service

Figure above bar shows % point change in total satisfied from Q1 2010



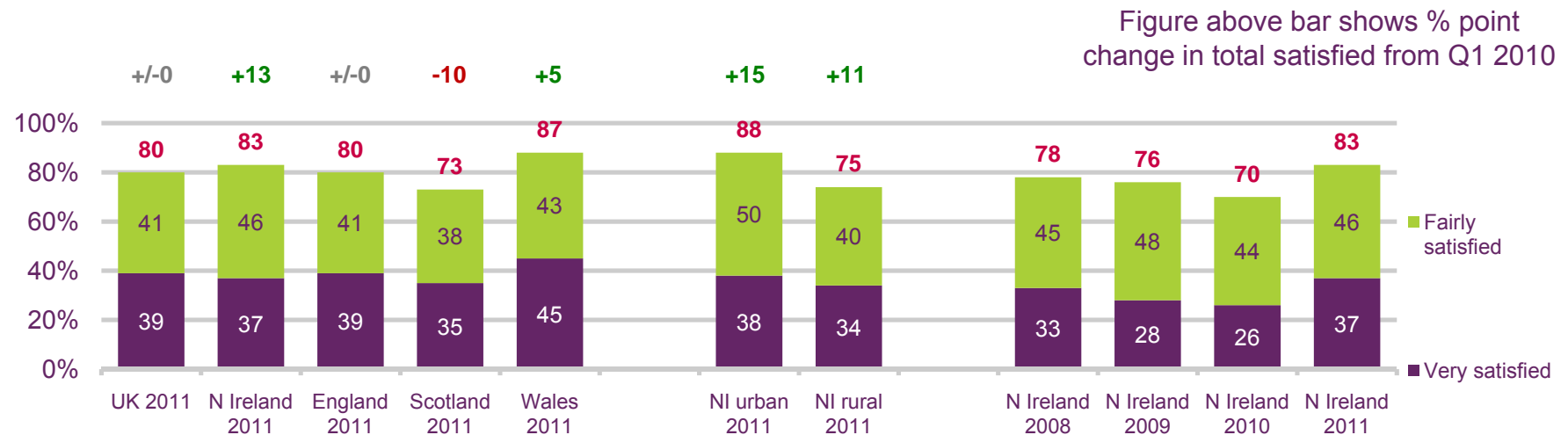
QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2243 UK, 335 Northern Ireland, 1311 England, 294 Scotland, 303 Wales, 169 Northern Ireland urban, 166 Northern Ireland rural, 319 Northern Ireland 2008, 388 Northern Ireland 2009, 469 Northern Ireland 2010, 335 Northern Ireland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed broadband service

## Satisfaction with speed of fixed broadband connection



QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

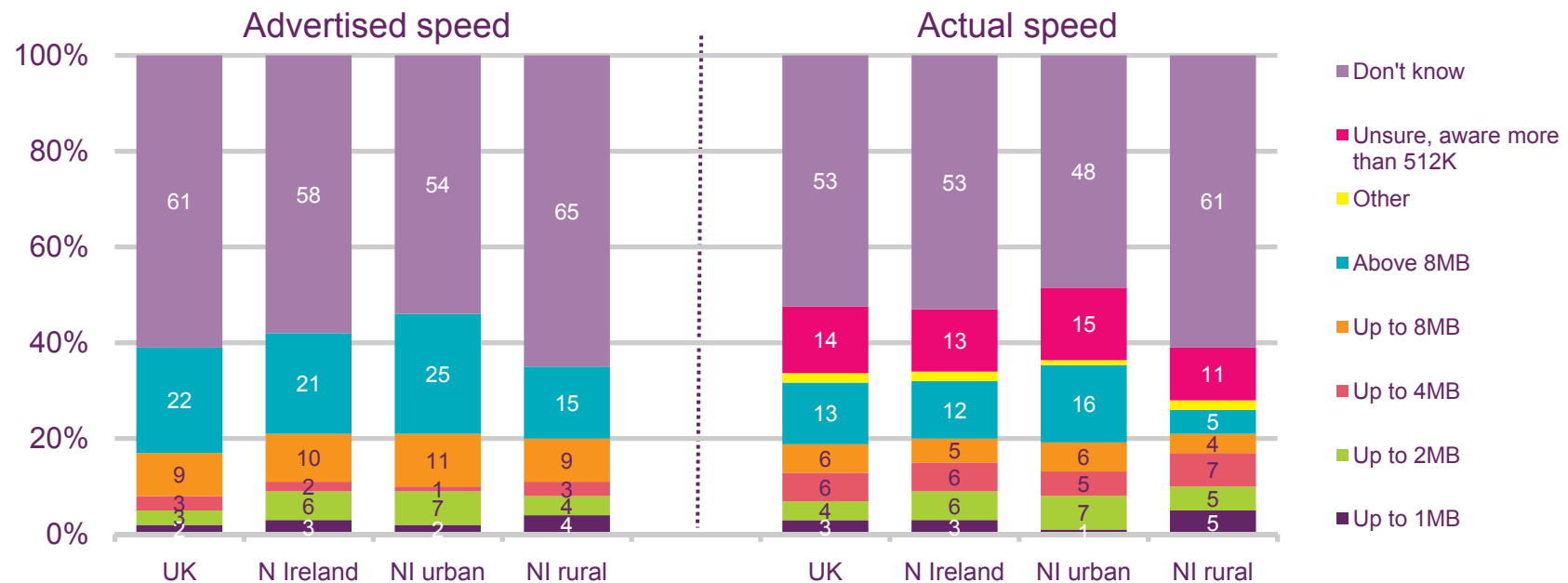
Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2243 UK, 335 Northern Ireland, 1311 England, 294 Scotland, 303 Wales, 169 Northern Ireland urban, 166 Northern Ireland rural, 319 Northern Ireland 2008, 388 Northern Ireland 2009, 469 Northern Ireland 2010, 335 Northern Ireland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online



# Awareness of advertised and actual broadband speeds in Northern Ireland



QE17. What was the advertised speed of your main home internet connection when you took up your service?/ QE16. What is the actual speed of your main home internet connection?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with broadband as their main connection at home (n = 2481 UK, 372 Northern Ireland, 190 Northern Ireland urban, 182 Northern Ireland rural)

## Estimated average and maximum download speeds by UK nation, November/December 2010



Source: SamKnows measurement data for all panel members with a connection in November/December 2010, Panel Base: 999

Notes: (1) Data have been weighted by ISP package and LLU/non-LLU connections, Rural/Urban, Geographic Market classification and distance from exchange to ensure that they are representative of UK residential broadband consumers as a whole; (2) As sufficient sample sizes were not available for consumers on packages of 'up to' 2Mbit/s or less, data collected for these packages in April 2009 has been factored in, in proportion to share of all connections in November/December 2010 and an estimated split between nations; (3) Data collected from multi-thread download speed tests