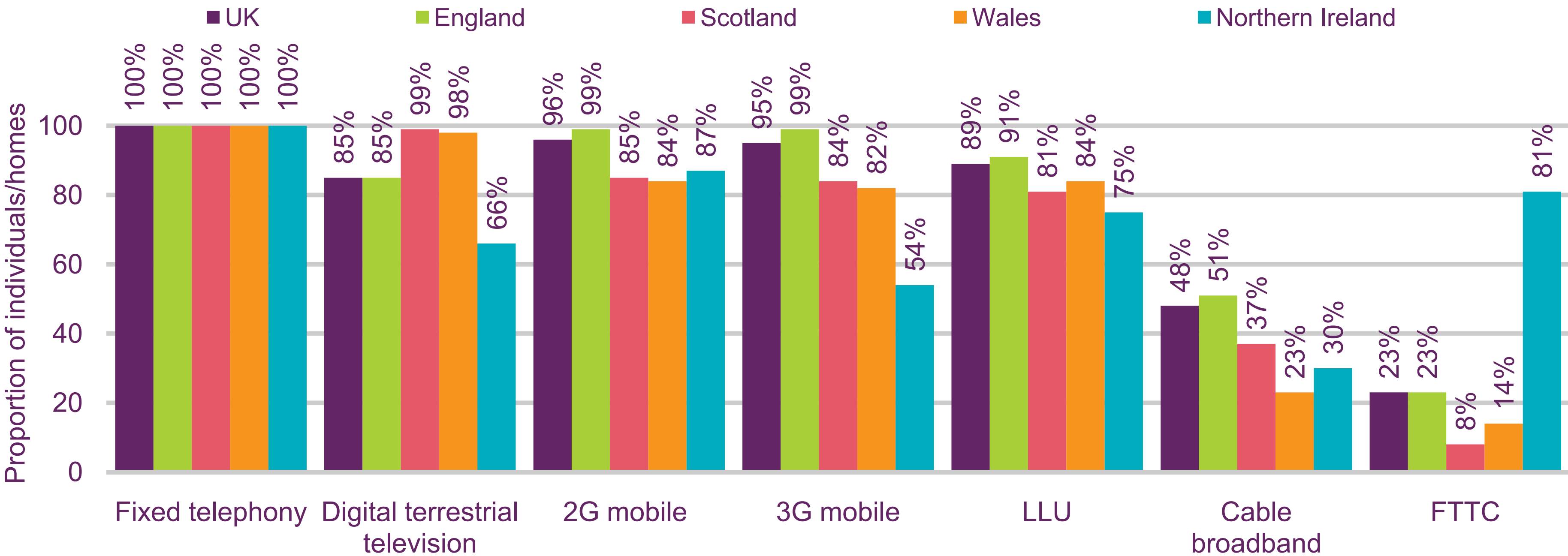
The market in context

Fast facts

	UK	England	Scotland	Wales	Northern Ireland	Scotland urban	Scotland rural	UK urban	UK Rural
Digital TV take-up among TV homes	96 ↑+4	96 ↑+4	97 ↑+6	99	90	97 ↑+6	98 ↑+11	96 ↑+4	95 ↑+3
Broadband take-up	74 ↑+3	76	61	71 ↑+7	75	60	68	74 ↑+4	80 ↑+5
Mobile broadband	17 ↑+2	18 ↑+3	9	16	13	8	13	17	14
Mobile phone take-up	91 ↑+2	92 ↑+2	86	87	92	85	88	91 ↑+2	92
Use mobile to access internet	32 ↑+9	34 ↑+9	21 ↑+6	25	29 ↑+8	21	25 ↑+10	34 ↑+8	23
Smartphone take-up amongst mobile phone owners	30 ↑+	31 ↑+	21 ↑+	29 ↑+	23 ↑+	20 ↑+	25 ↑+	30 ↑+	30 ↑+
Fixed landline take-up	85	85	80	80	84	78	86	84	90
Households taking bundles	53	54	49	47	46	51	41	54 ↑+3	47
DAB ownership amongst radio listeners	37	39	31	27	28	30	32	37	40

Source: Ofcom research, Quarter 1 2011
Base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 2458 UK urban, 1016 UK rural,)
Note: This is the first year we have collected survey data on smartphone use, so we cannot report a precise year on year increase. We are confident that ownership has increased significantly in the last year though.

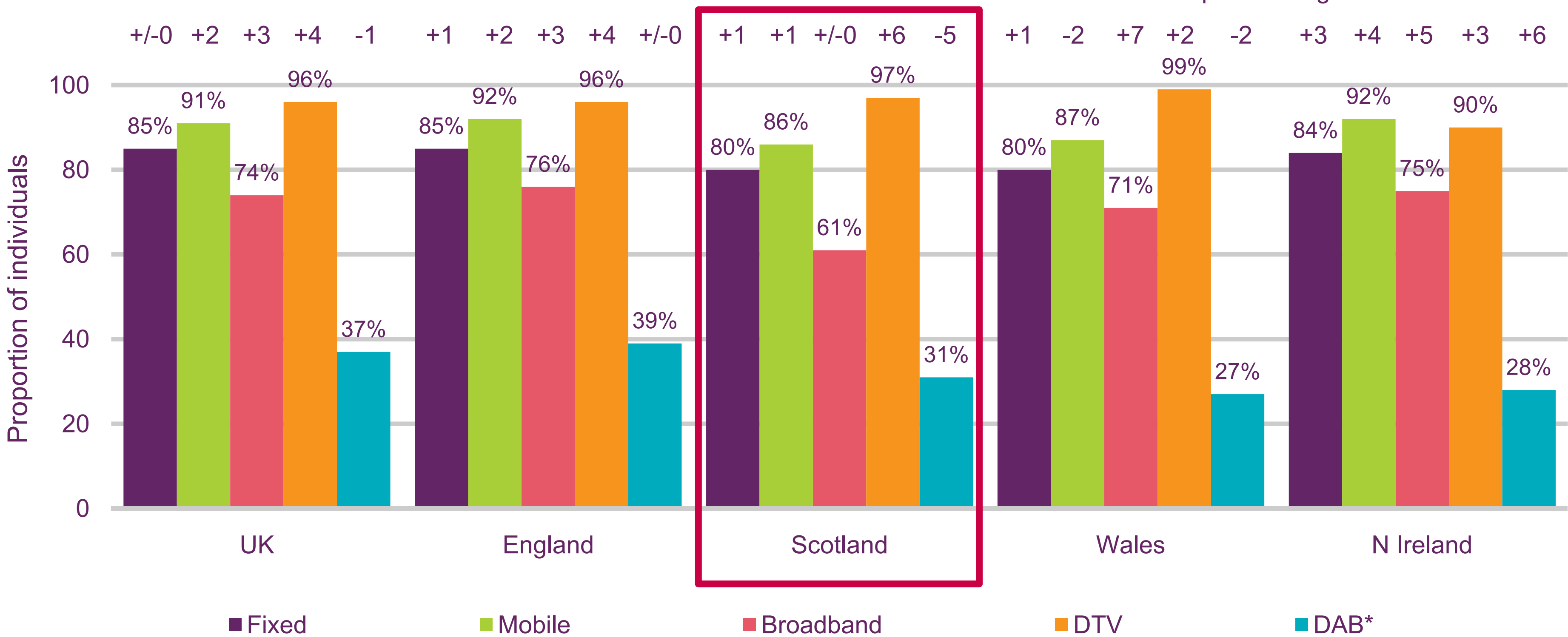
Communications infrastructure availability across the UK's nations, 2011



Sources: Ofcom and:
1. DTT: Availability of 17 services. Ofcom estimates.
2. 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 (Q2 2011). Note that coverage data has been restated; this means that year-on-year comparisons are not possible.
3. 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 (Q2 2011). Note that coverage data has been restated; this means that year-on-year comparisons are not possible.
5. Proportion of households connected to an LLU-enabled exchange
6. Proportion of households passed by Virgin Media's broadband-enabled network
7. Proportion of households connected to an FTTC-enabled exchange, June 2011

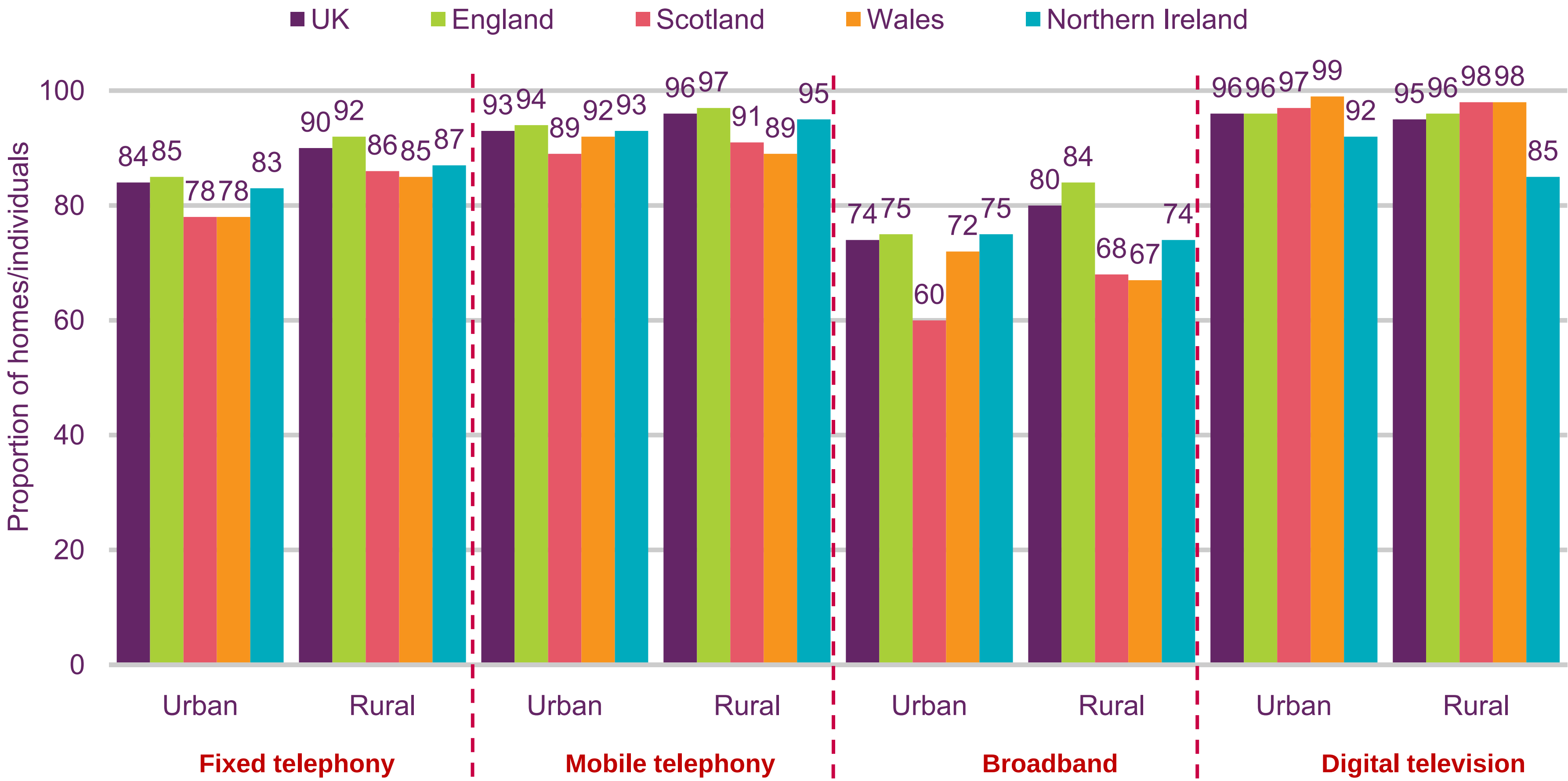
Patterns communications service adoption across the nations, 2011

Figure above bar shows % point change from Q1 2010



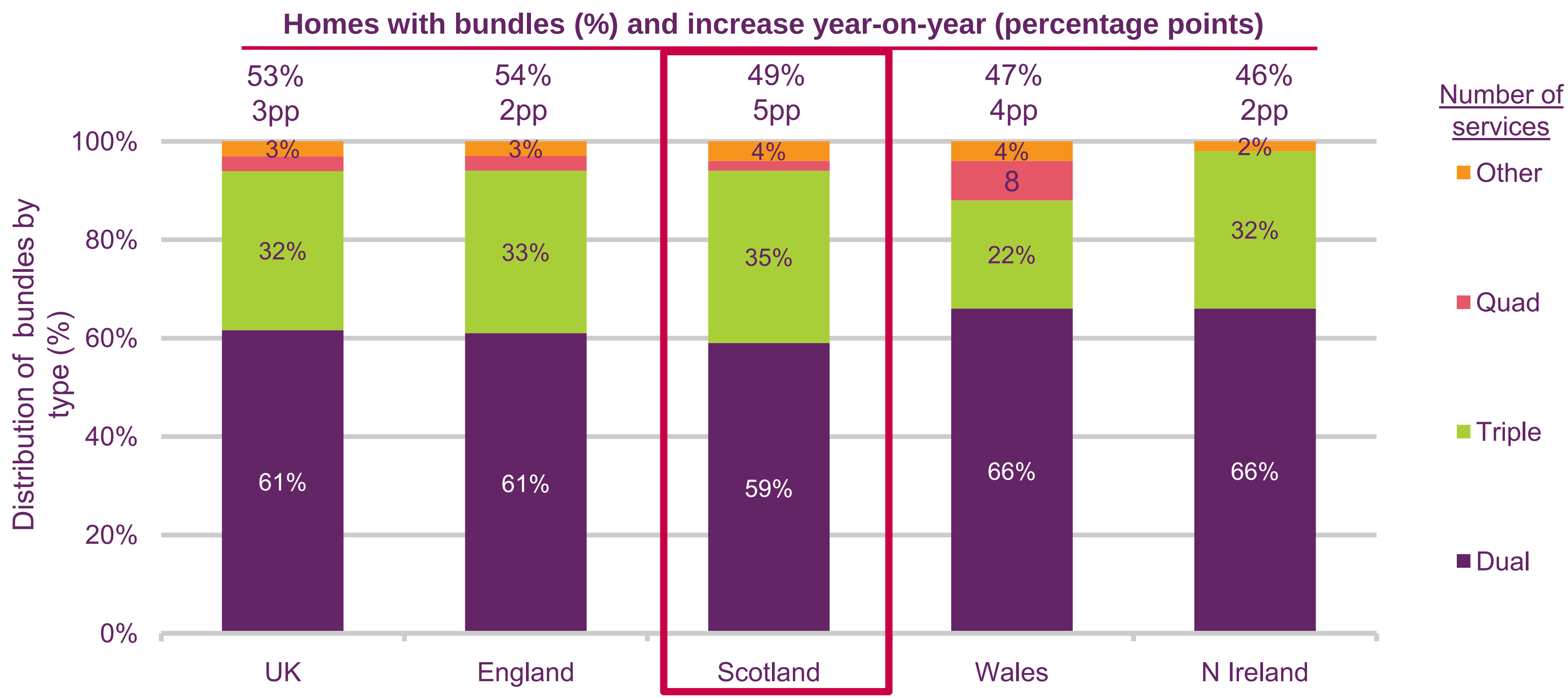
Source: Ofcom research, Quarter 1 2011
Fixed line base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)
Fixed line question: Is there a landline phone in your home that can be used to make and receive calls?
DTV base: Adults aged 16+ with a TV in the household (n= 3412 UK, 1941 England, 479 Scotland, 483 Wales, 509 Northern Ireland)
DTV question. Which, if any, of these types of television does your household use at the moment?
Broadband base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)
Broadband question: Which of these methods does your household use to connect to the internet at home?
DAB base: Adults aged 16+ with any active radio sets in the household who listen to radio. *NB Data previous to 2011 is based on all who listen to radio (n = 2811 UK, 1629 England, 357 Scotland, 397 Wales, 428 Northern Ireland)
DAB question: How many of these radio sets are digital radios? Response represents those with one or more sets.
Note: Remaining percentages are Don't know responses
Mobile base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)
Mobile question: Do you personally use a mobile phone?

Adoption of communications technology/services in urban and rural locations



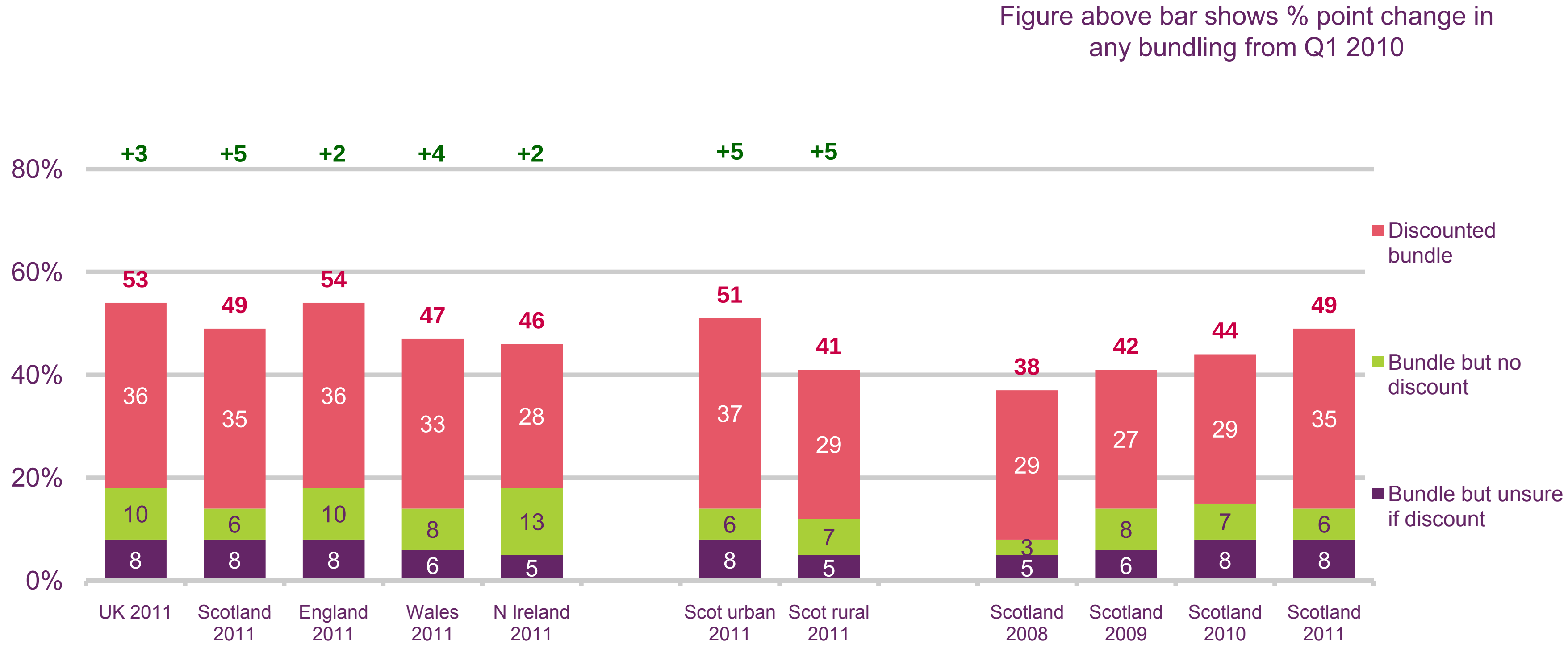
Source: Ofcom research, Quarter 1 2011
Fixed telephony, mobile telephony, broadband base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)
DTV base: Adults aged 16+ with a TV in the household (n= 3412 UK, 1941 England, 479 Scotland, 483 Wales, 509 Northern Ireland)

Take-up of bundles, by nation



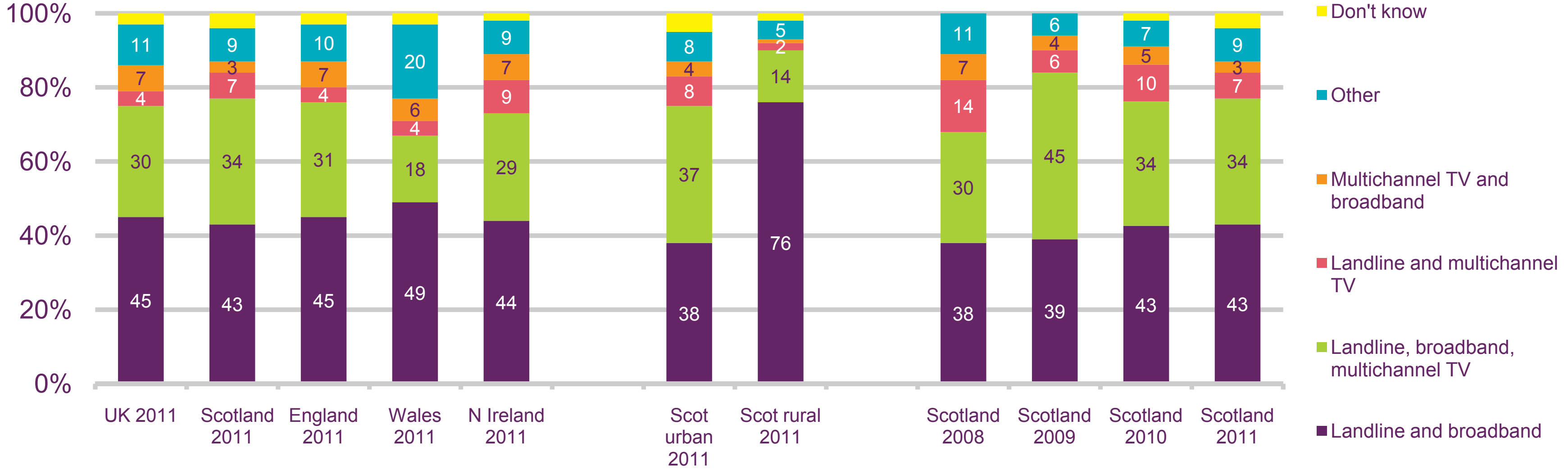
Source: Ofcom research, Q1 2011
Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 1680 UK, 1035 England, 226 Scotland, 197 Wales, 222 Northern Ireland)
Note: Remaining percentages are Don't know responses

Percentage of consumers buying bundled services



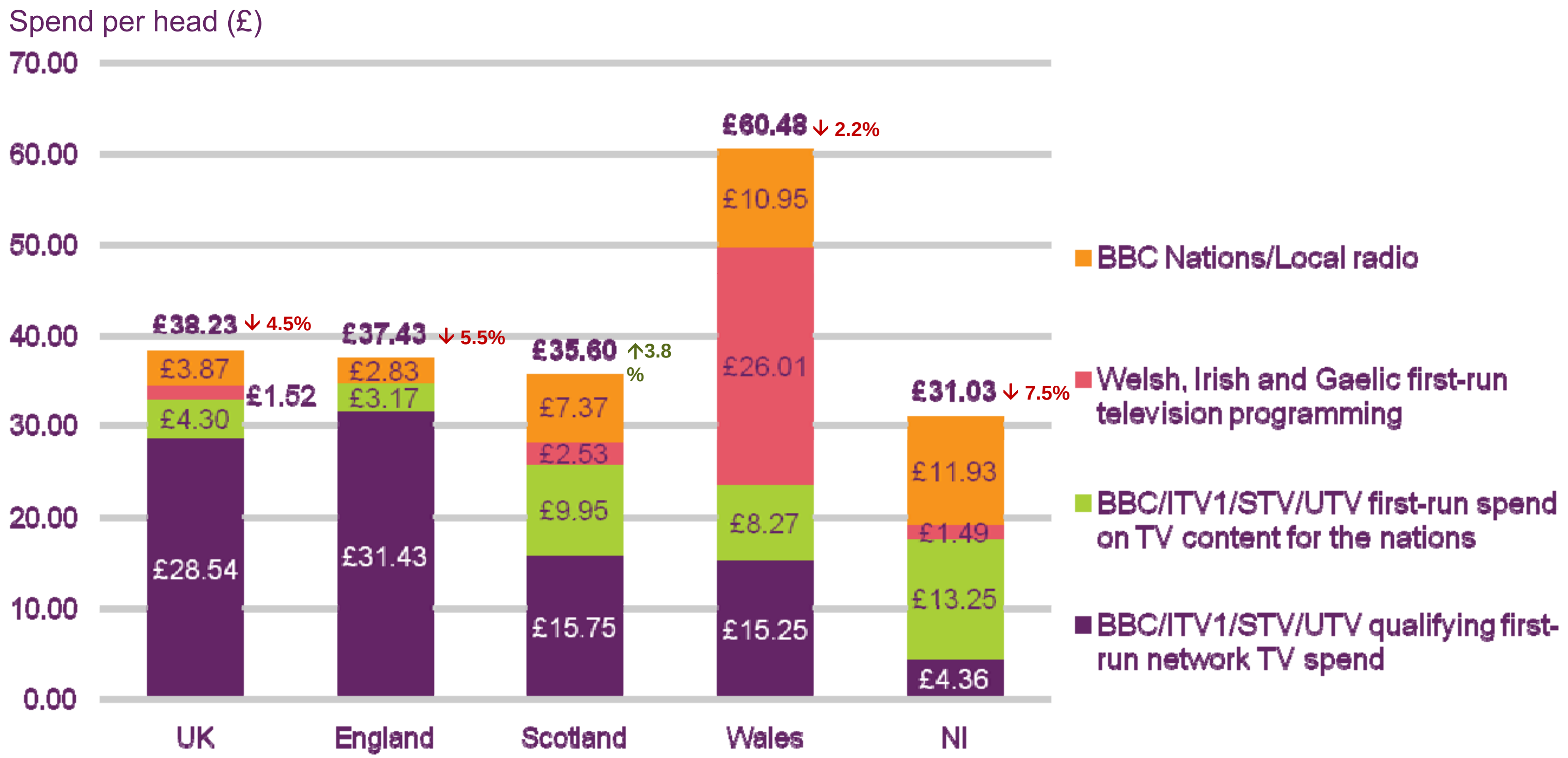
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ QG3. Do you receive a discount or special deal for subscribing to this package of services?
Source: Ofcom research, Quarter 1 2011
Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)
Note: Figures above chart columns indicate total uptake of bundled service

Trends in purchasing multiple communication services from a single supplier



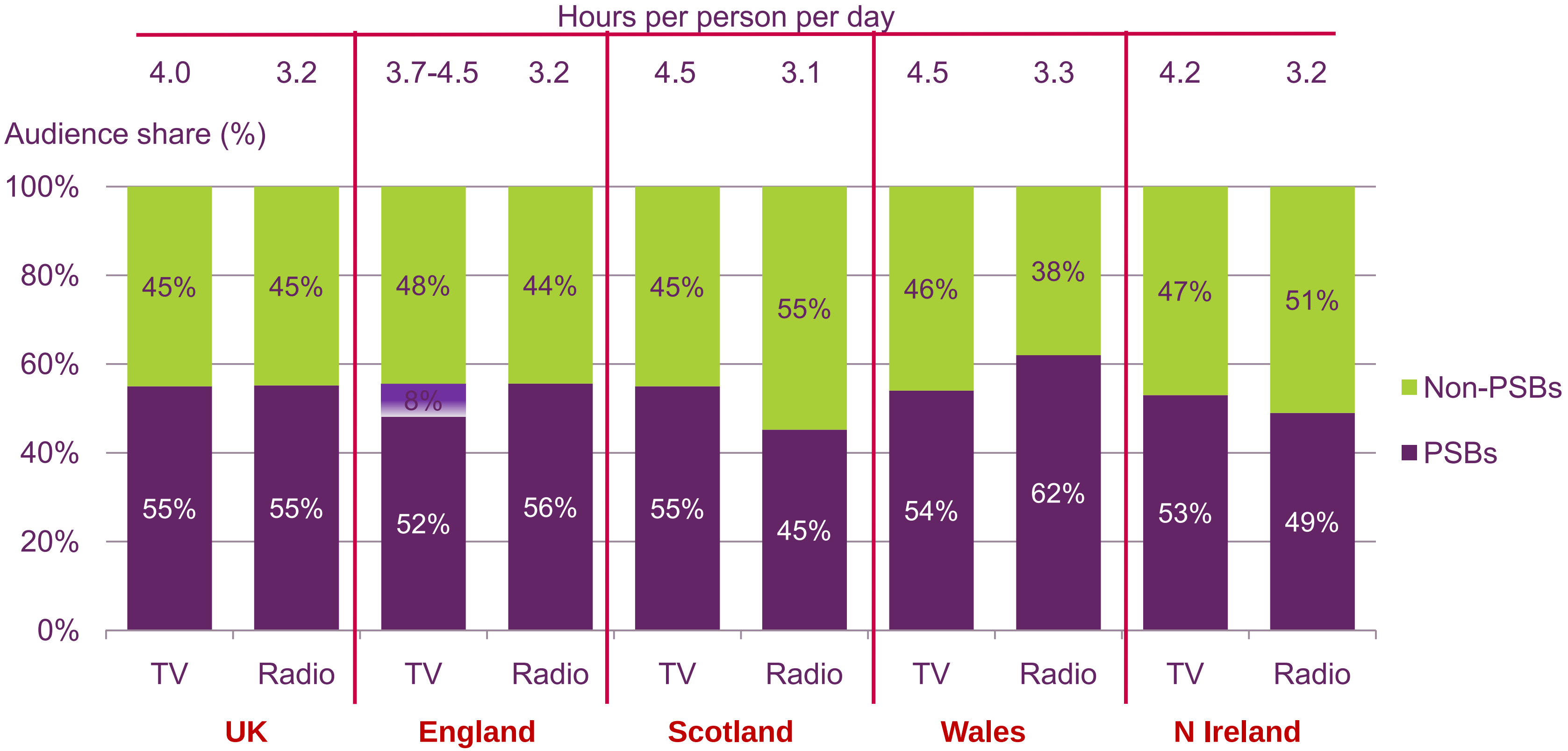
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ QG3. Do you receive a discount or special deal for subscribing to this package of services?
Source: Ofcom research, Quarter 1 2011
Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 1680 UK, 226 Scotland, 1035 England, 197 Wales, 222 Northern Ireland, 123 Scotland urban, 103 Scotland rural, 324 Scotland 2008, 351 Scotland 2009, 605 Scotland 2010, 226 Scotland 2011)

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



Source: Operators, Annual Reports and Ofcom calculations

Hours of daily TV and radio use, by nation, 2010



Source: BARB. i) TV: PSBs = BBC One, BBC Two, ITV1, C4+S4C, Five. (ii) Radio : PSBs = all BBC radio stations.
Notes: For England TV, a range is displayed reflecting the regions with the highest and lowest average daily viewing figures respectively
For Wales TV, viewing hours shows an increase of 0.9 hours on 2009 figures. While it is likely that there has been an increase in viewing in Wale due to digital switchover, this increase may also be attributable to the effects of the new BARB panel, introduced at the start of 2010. There are tw important changes to note regarding the new BARB panel: 1) The panel is based on completely different viewers to the previous panel, meaning that data comparisons pre- and post-2010 should be viewed with caution. 2) There was a redefining of border boundaries under the new panel change. Previously, viewing of C4 in some areas registered as 'out of area' and so did not count towards the Wales area viewing figures; under th new p... re-defined regions however, viewing of C4 from these regions is now included.