

Extended chart pack

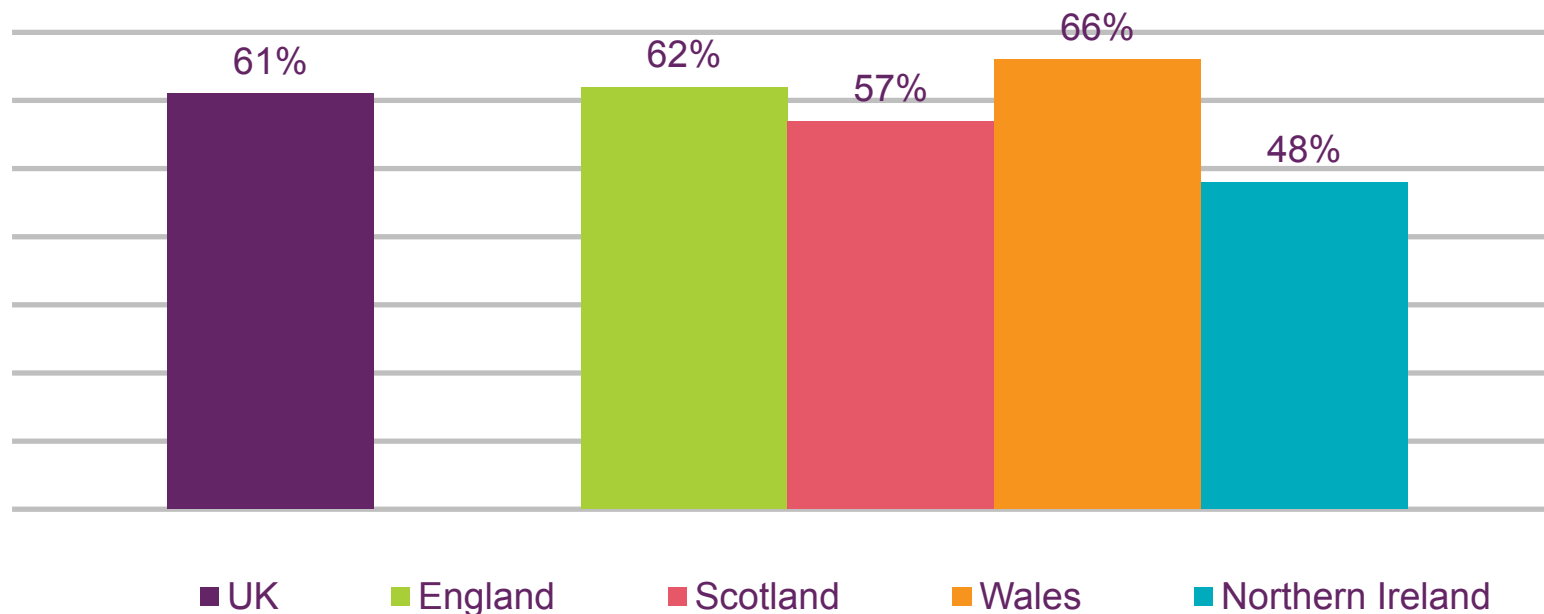
Northern Ireland – The Communications Market Report 2013

1st August 2013

Northern Ireland's communications market

Proportion 'ever' using online government services, by nation

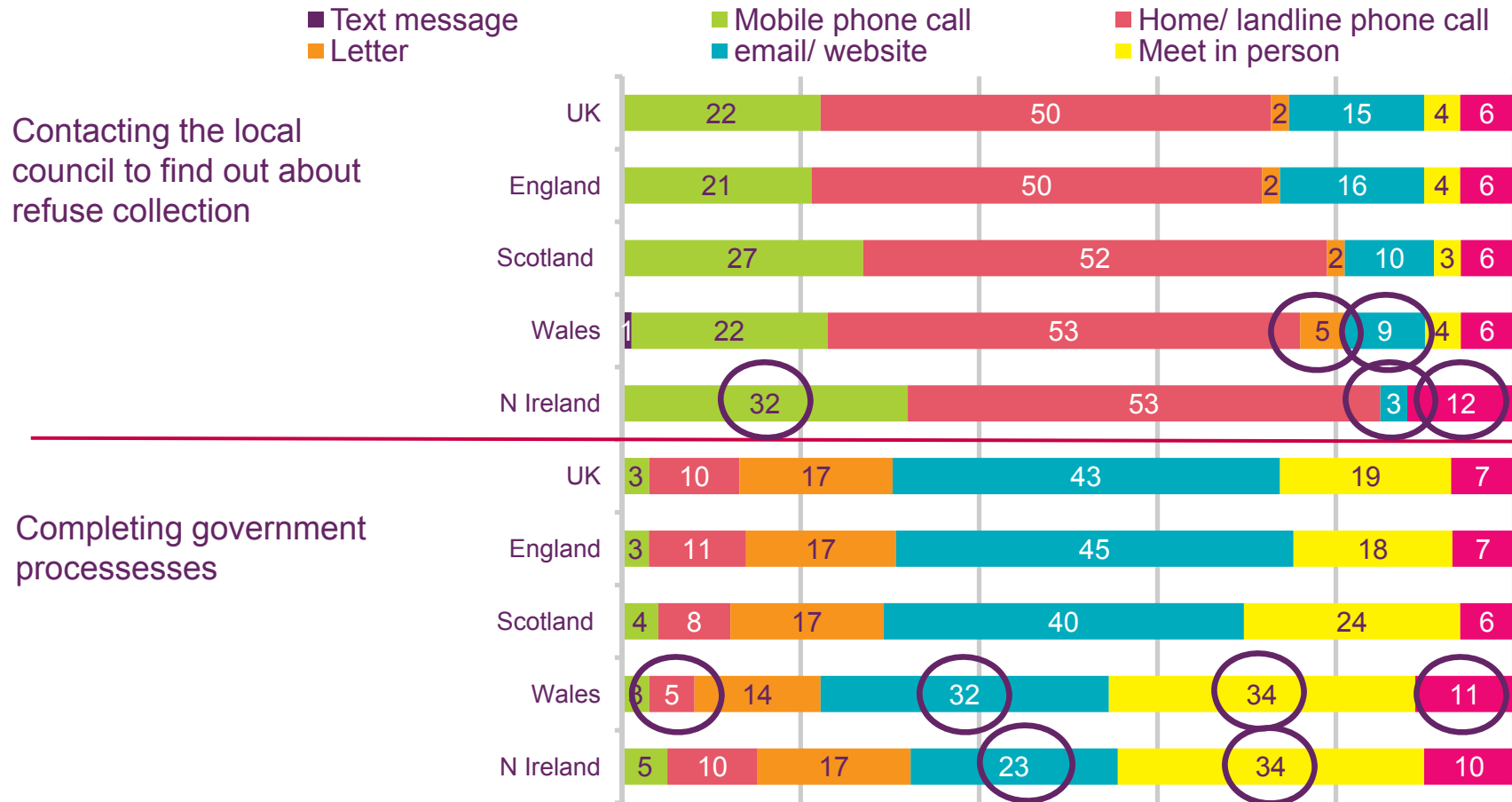
% That use services



Source: Kantar Media Omnibus

Base: All with internet access in the UK (N=2271) England (N=1325) Scotland (N=399) Wales (N=297) Northern Ireland (N=250). Question: Q.8 Nowadays, many government services are available online. Some examples of these services include <Examples> Do you ever use government online services? (Examples included paying car tax, completing tax return, applying for benefits, completing the census, registering to vote, applying for a school place etc.)

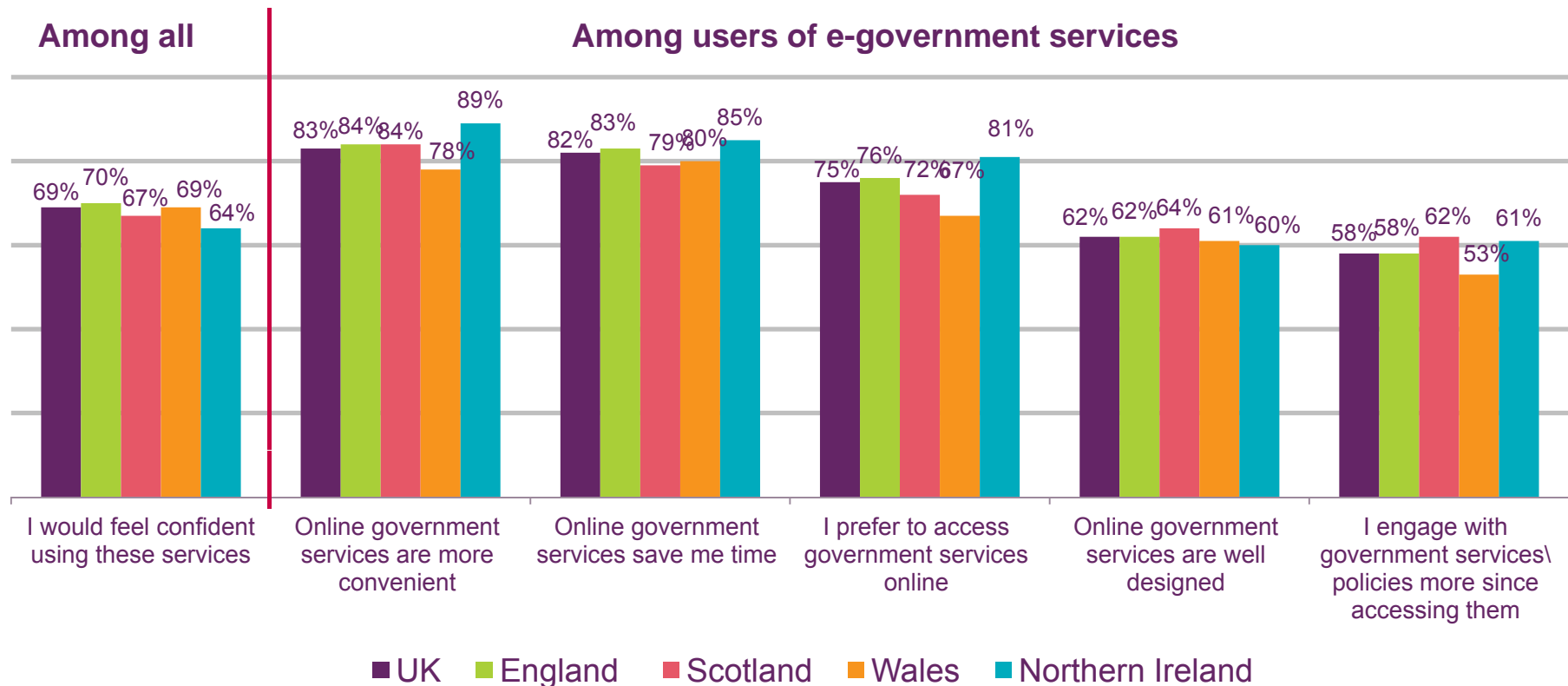
Preferred method of contact with local council, and for government processes, by nation



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012
 Base: All adults aged 16+ (1805 UK, 1125 England, 236 Scotland, 231 Wales, 213 Northern Ireland). Significance testing shows any difference between any nation and the UK. NZ2A-E. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded)

Attitude towards online government services, by nation

% Agree strongly or slightly



Source: Kantar Media Omnibus

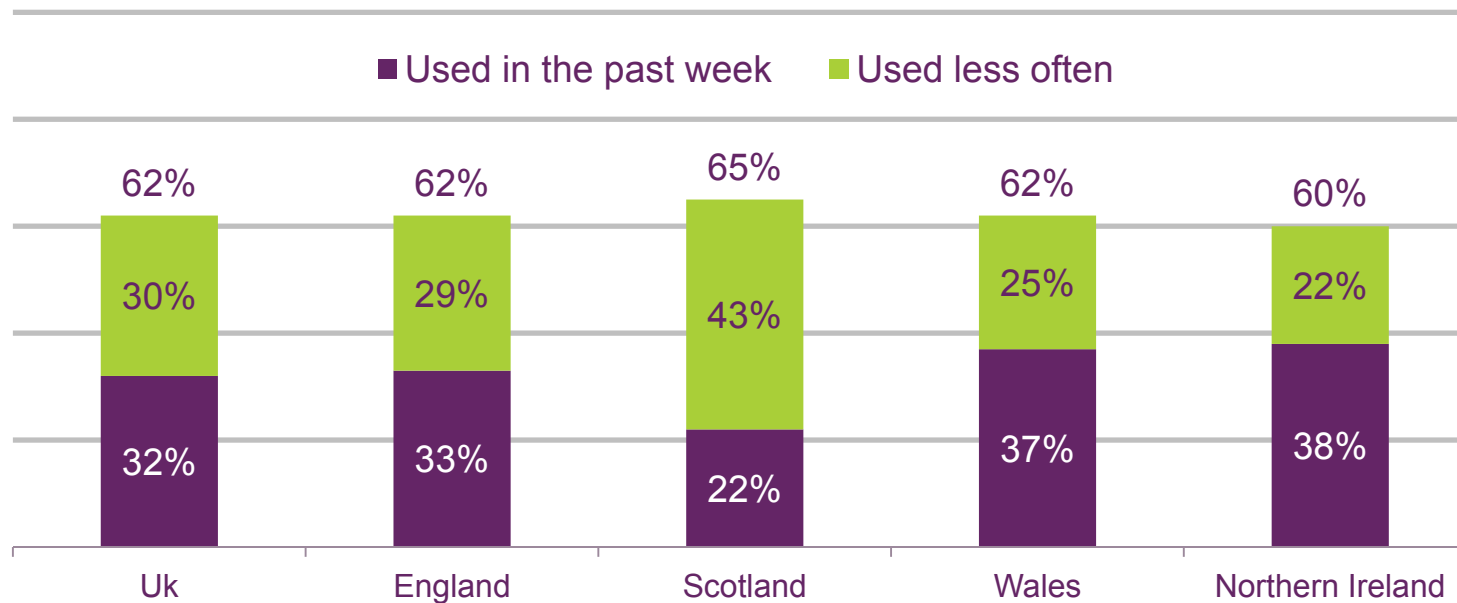
Base: All with internet access: UK (N=2271), England (N=1325), Scotland (N=399), Wales (N=297), Northern Ireland (N=250).

All ever used e-government services: the UK (N=1294), England (N=779), Scotland (N=217), Wales (N=187), Northern Ireland (N=109).

Q.9 Thinking about the kinds of services I have just shown you please tell me to what extent you agree or disagree with each of the following statements.

Proportion of internet users shopping online, by nation

%

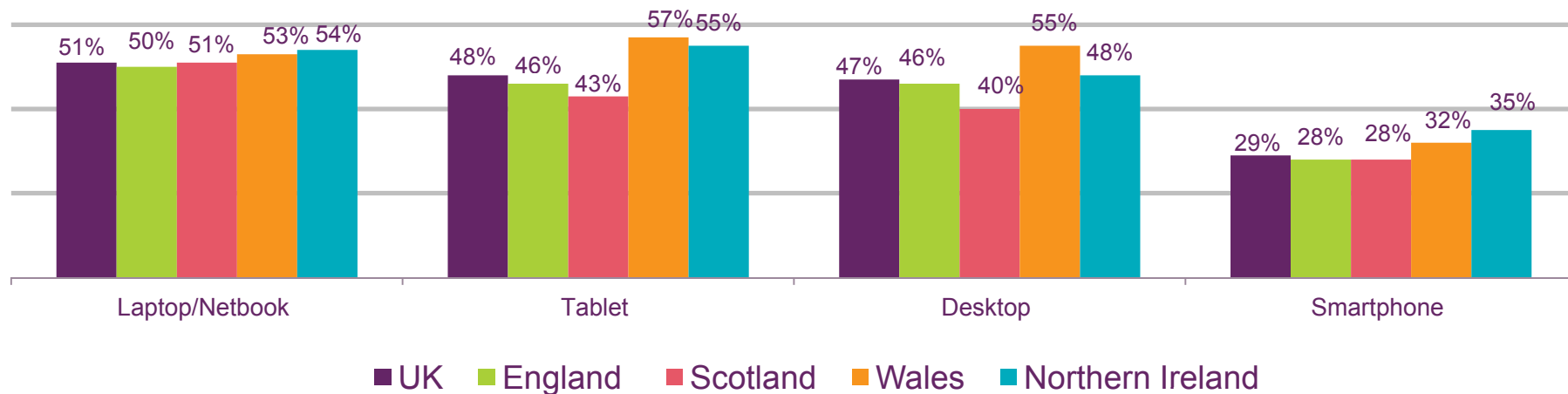


Source: Ofcom technology tracker research, Quarter 1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere 2013. % purchasing good/services/tickets etc online. (UK= 2918, England=1787, Scotland=394, Wales=361, Northern Ireland=376). QE5. Which, if any, of these do you use the internet for? Note figures in the chart below are not directly comparable to figures on internet from previous years due to changes in question wording.

Proportion of people shopping online through devices, by nation

Among owners of each device

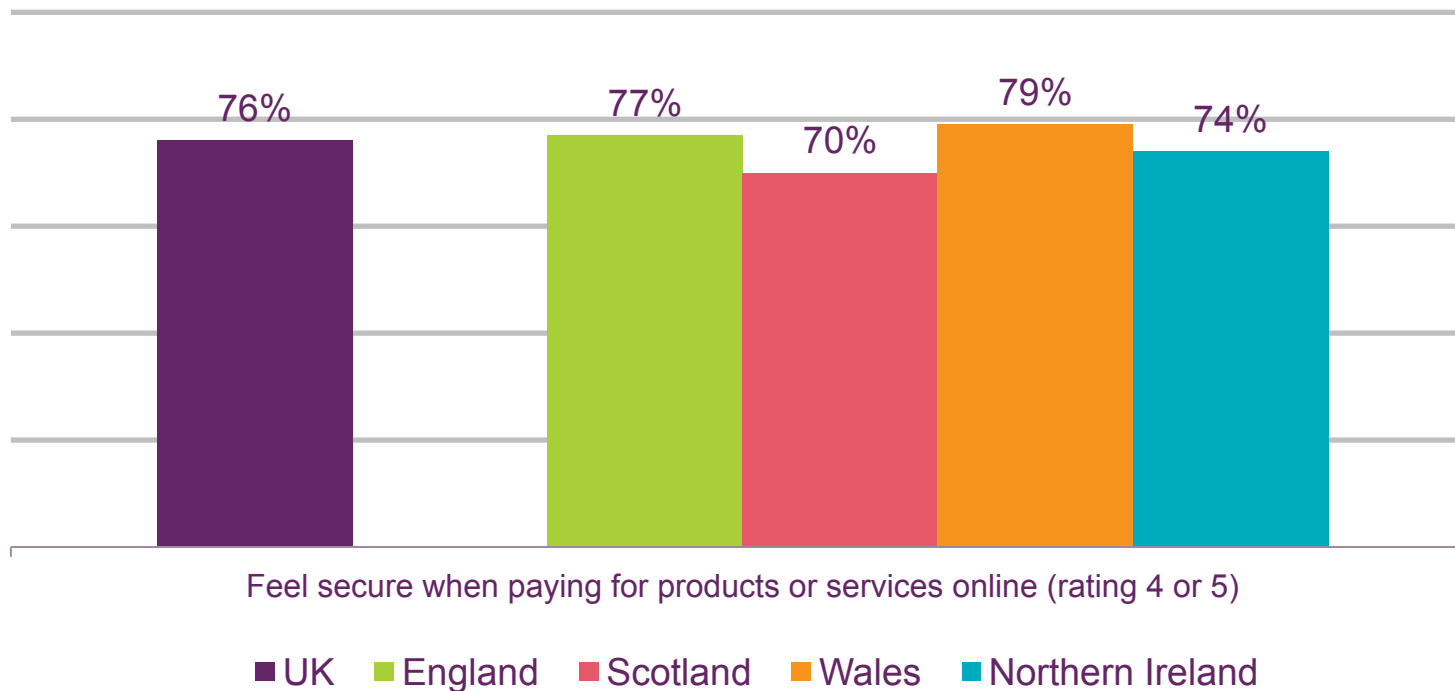


Source: Kantar Media Omnibus

Base: All who have each device. Desktop: UK (N=913) England (N=567) Scotland (N=133) Wales (N=119) Northern Ireland (N=94). Laptop/netbook: UK (N=1647) England (N=951) Scotland (N=303) Wales (N=211) Northern Ireland (N=182). Tablet: UK (N=608) England (N=334) Scotland (N=113) Wales (N=79) Northern Ireland (N=82). Smartphone: UK (N=1230) England (N=715) Scotland (N=213) Wales (N=157) Northern Ireland (N=145). Bases are 75+ respondents. Question: Q.1A Which of these activities do you use your device for nowadays?

Perceptions of security when shopping online, by nation

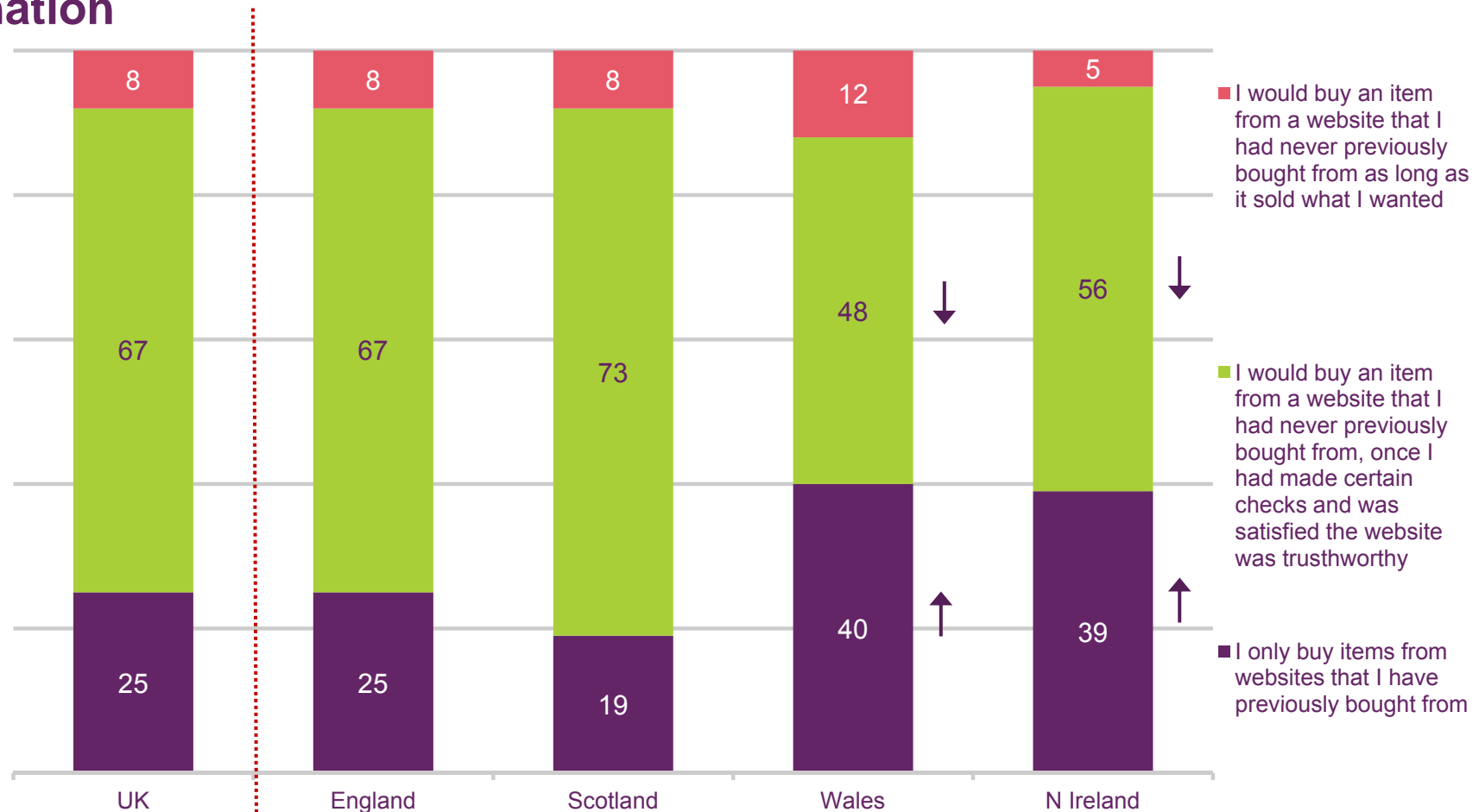
% Feel secure



Source: Kantar Media Omnibus

Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Question: Q.11A Generally, when ordering online how secure do you feel when paying for products or services online? Using a scale from 1-5, where 1 means not at all secure and 5 means very secure.

Online shoppers' choice of websites for shopping, by nation



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012
 Base: All who say they shop online (1076 UK, 667 England, 151 Scotland, 139 Wales, 119 Northern Ireland)
 Significance testing shows any difference between any nation and the UK. IN33E– When you want to buy something online, which of the following statements most closely applies? (Prompted responses, single coded)

Confidence in delivery when shopping online, by nation

% Feel confident

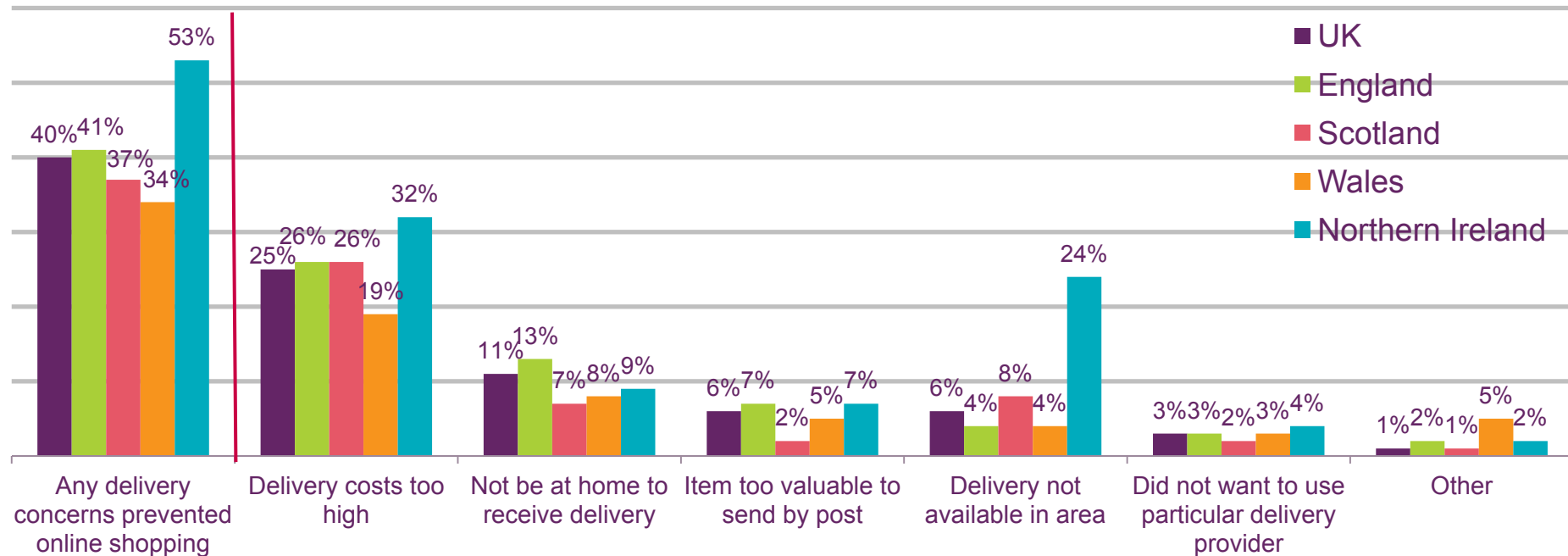


Source: Kantar Media Omnibus

Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Q.11B Generally, when ordering online how confident are you that the goods will arrive on time and in good condition? Using a scale from 1-5, where 1 means not at all confident and 5 means very confident.

Delivery concerns preventing online purchasing, by nation

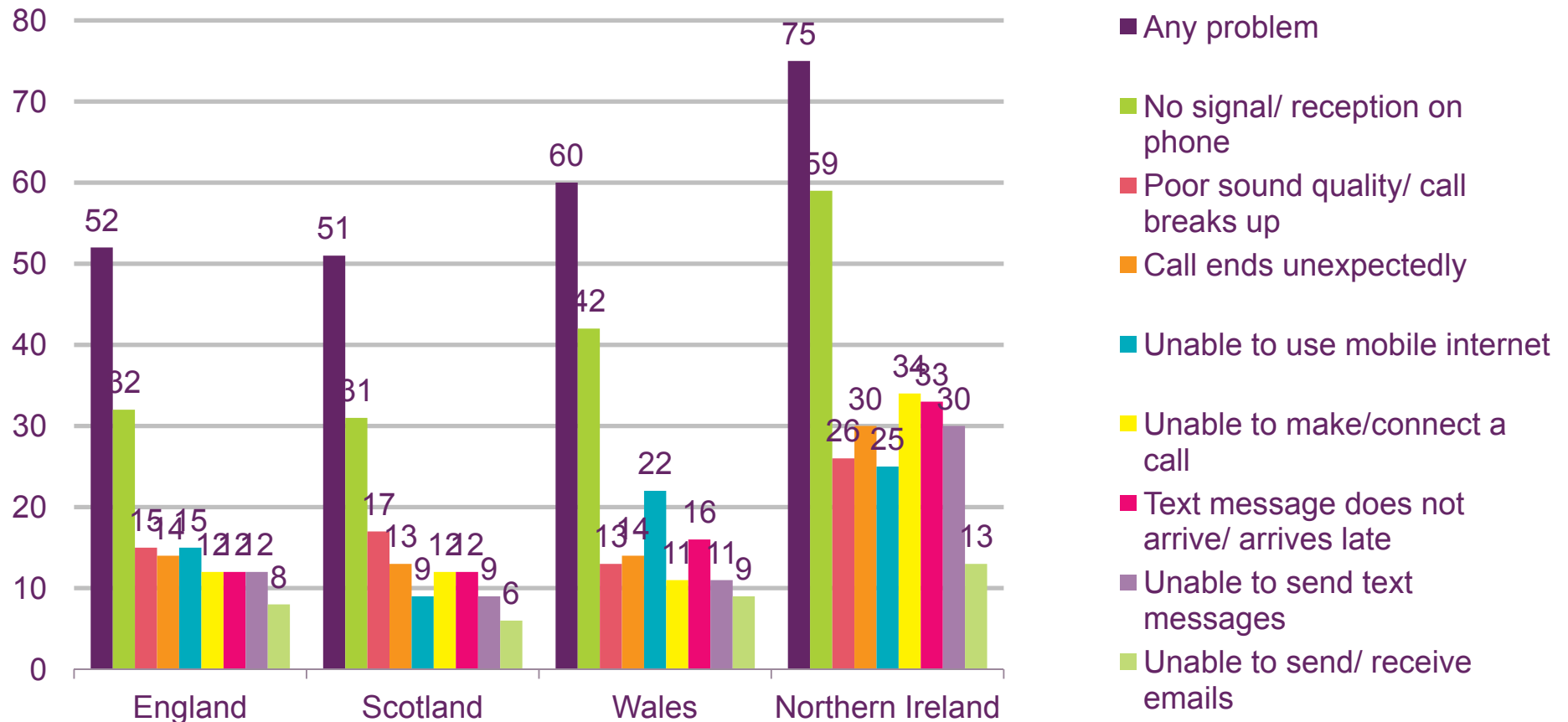
% mentioned each reason



Source: Kantar Media Omnibus

Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Question: Q.14 Have delivery concerns ever prevented you from buying items online? If yes, which of the following reasons prevented you from shopping?

Mobile phone users who have ever experienced problems with reception



1. Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=1743/195/95/103)

3. Q13: Thinking about your mobile reception with ... in the UK, do you ever experience any of the following issues?

Net satisfaction/importance – ability to make calls in different locations (Q17/Q18)

		Indoor			Outdoor		
		Home	Work / place of study	General	Places go to regularly	Rural	Urban
UK	Importance	83	70	82	87	80	84
	Satisfaction	76	66	75	78	67	78
	S-I	-7	-4	-7	-9	-13	-6
England	Importance	82	70	81	86	79	83
	Satisfaction	76	66	74	78	67	77
	S-I	-6	-4	-7	-8	-12	-6
Scotland	Importance	86	71	89	90	84	88
	Satisfaction	80	66	80	82	71	80
	S-I	-6	-5	-9	-8	-13	-8
Wales	Importance	83	73	85	96	87	90
	Satisfaction	77	68	75	84	62	77
	S-I	-6	-5	-10	-12	-25	-13
Northern Ireland	Importance	92	76	91	94	93	90
	Satisfaction	72	58	77	76	70	80
	S-I	-20	-18	-14	-18	-23	-10

1. Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=2136/1743/195/95/103)

3. Q17: How important is it for you to be able to make calls in the following locations?

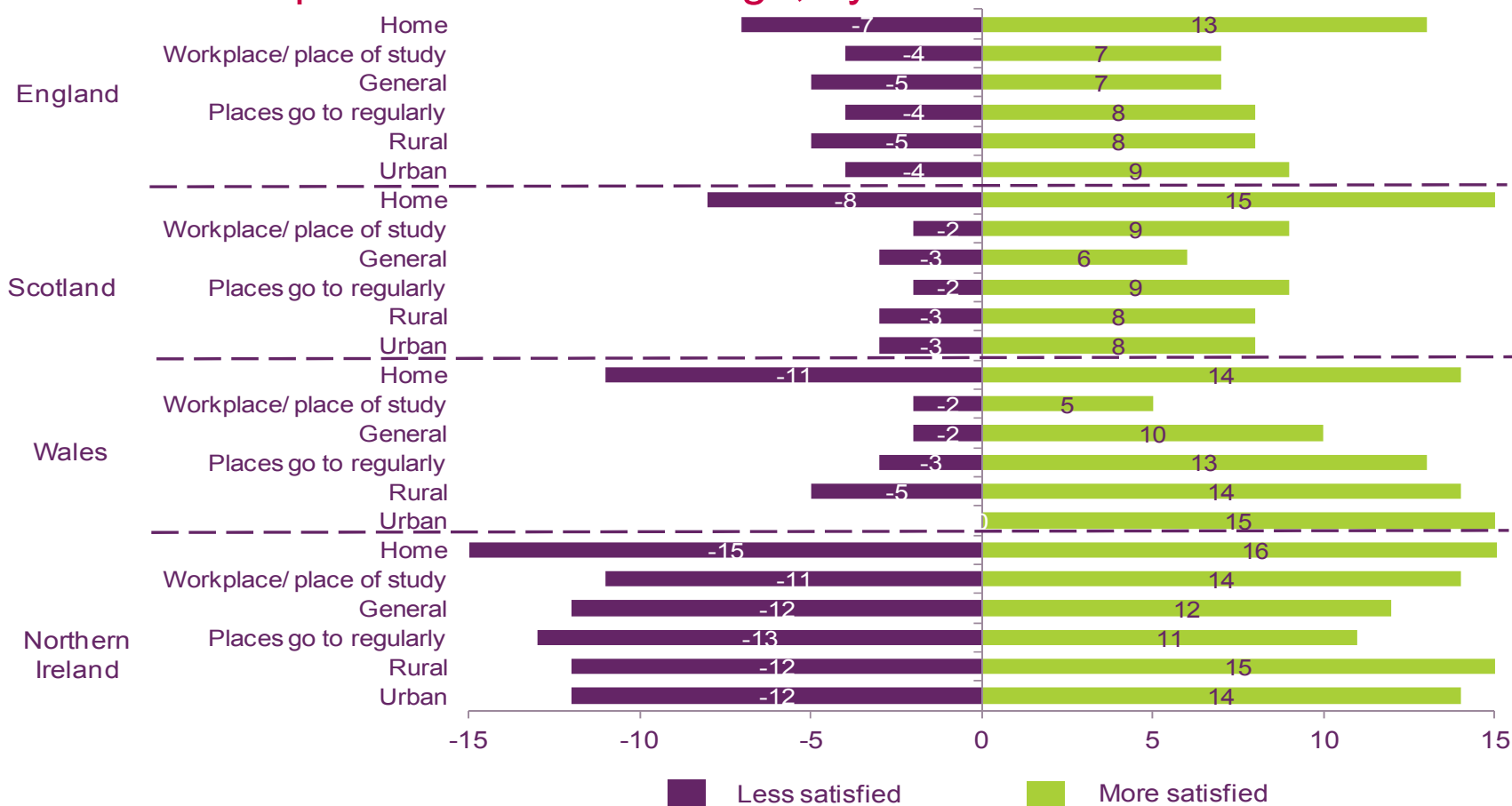
4. Q18: How satisfied do you feel with the ability to make calls in each of these locations?

5. Net figures shown for very important/somewhat important and very satisfied/somewhat satisfied

Change in satisfaction levels over the last 12 months, all nations



Change in levels of satisfaction with ability to make calls in different locations compared to 12 months ago, by nation

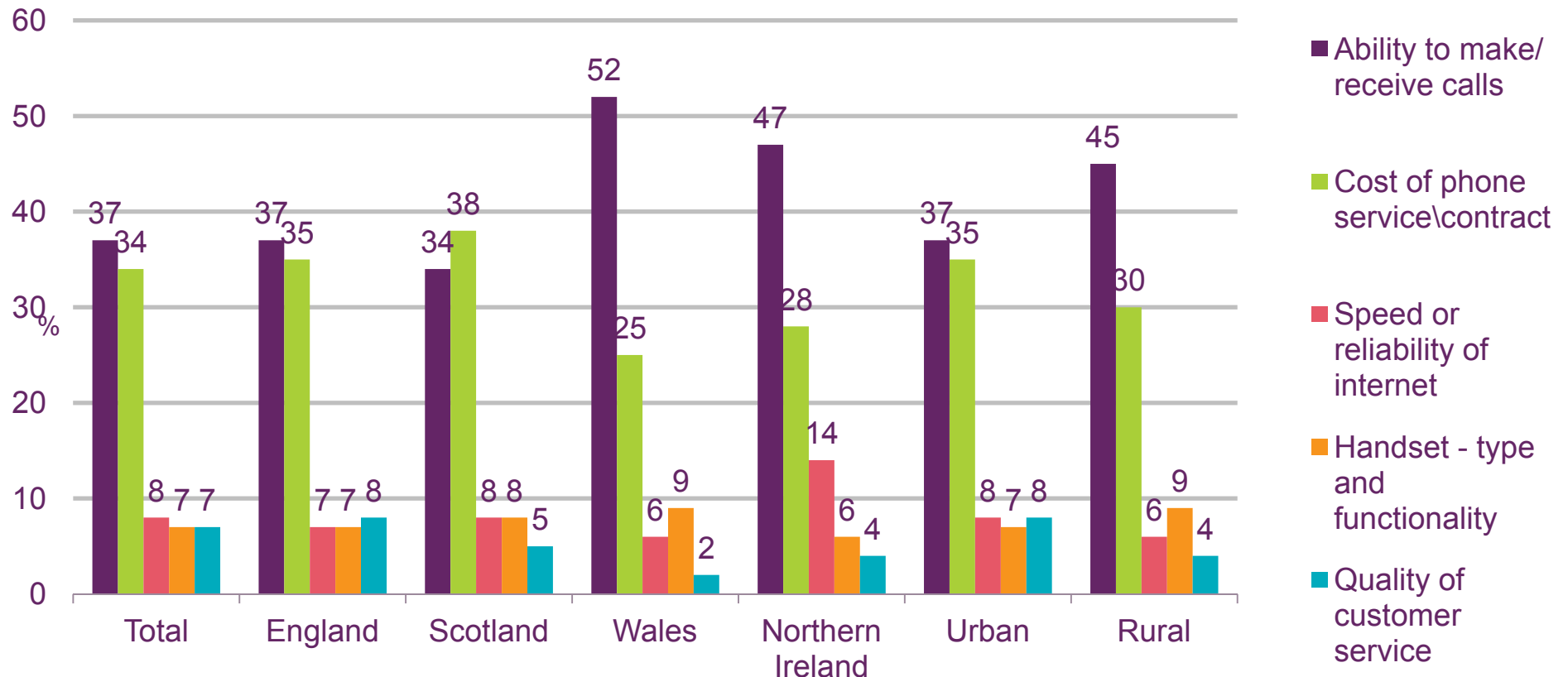


1. Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=2136/1743/195/95/103/1757/379)

3. Q.10 And which is the ... important to you when thinking about your mobile operator? Most important.

Most important element when considering mobile provider, by nation and urban/rural



1. Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=2136/1743/195/95/103/1757/379)

3. Q.10 And which is the ... important to you when thinking about your mobile operator? Most important.

2G and 3G mobile coverage

Proportion of premises covered by at least one operator (%)



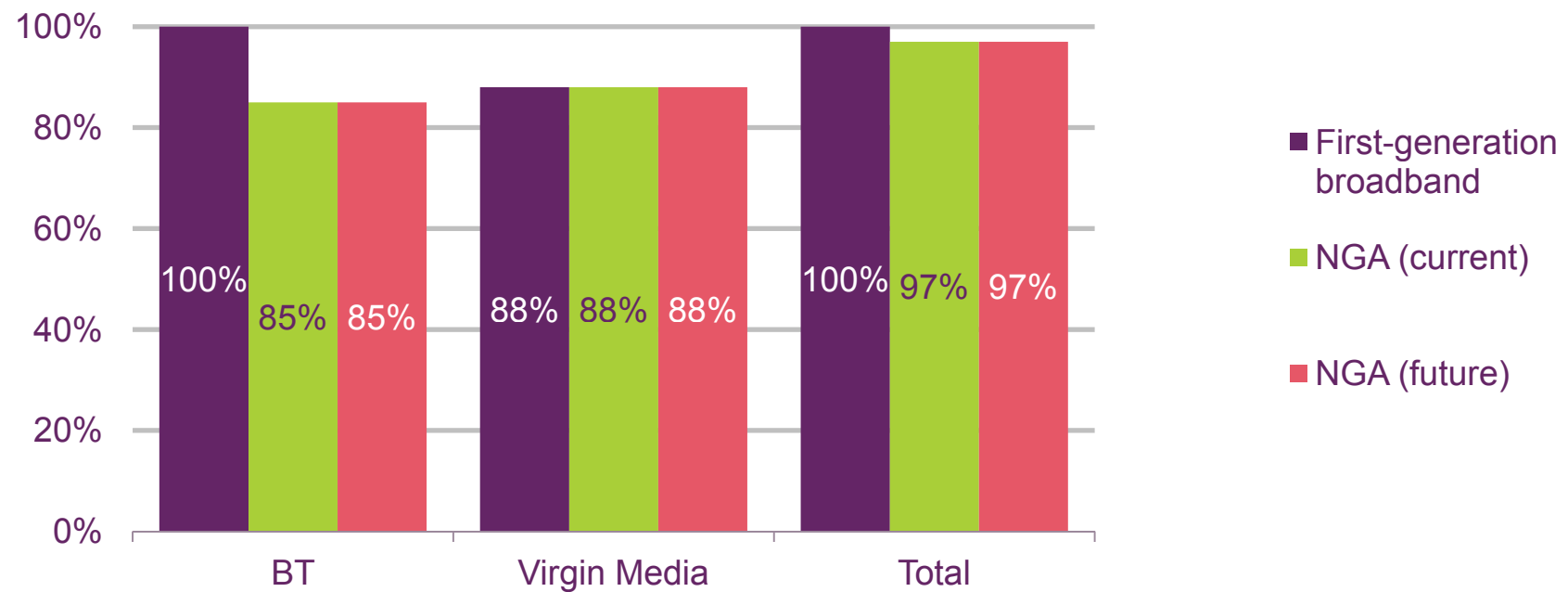
Source: Ofcom, The availability of communications services in the UK, May 2013

City population and premises data

City	Population	Total premises	Business premises	Residential premises
Belfast	c.269,000	c.132,000	c.8000	c.124,000

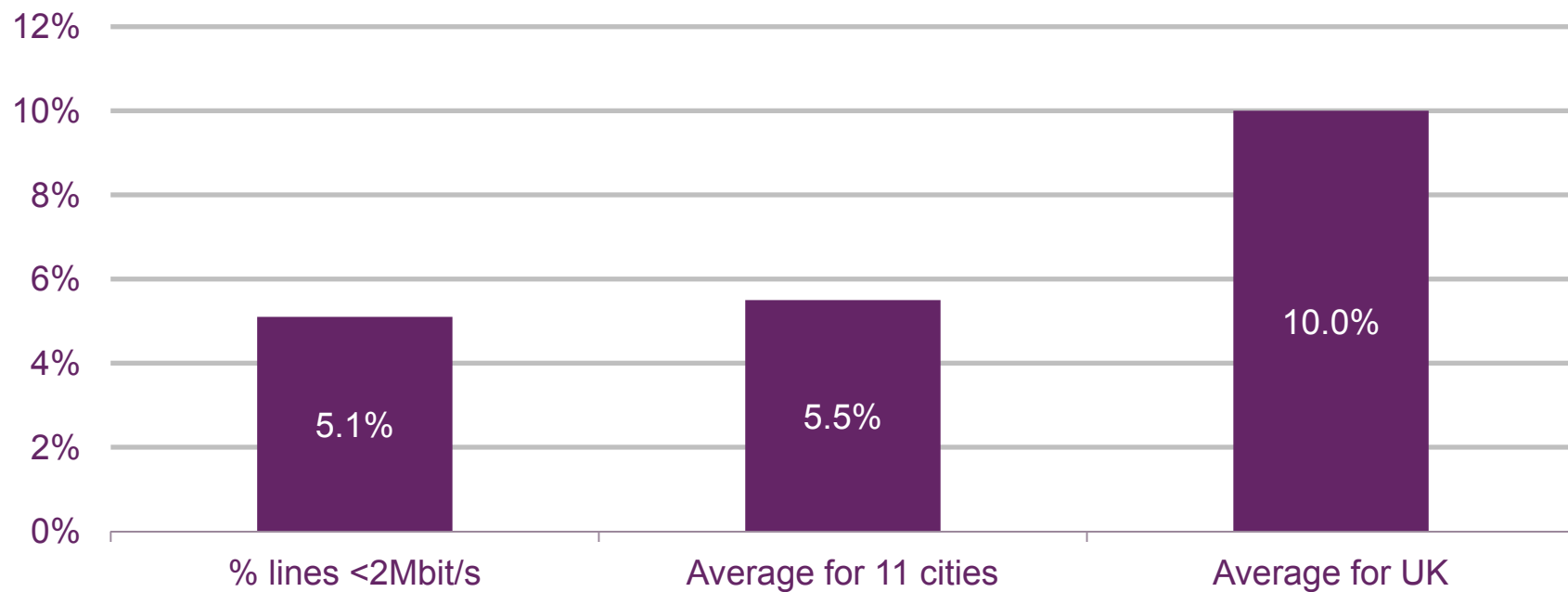
Source: Analysys Mason

Fixed network infrastructure premises passed availability



Source: Analysys Mason, Ofcom Infrastructure Report

Percentage of lines that have a speed of less than 2Mbit/s, and relative positioning



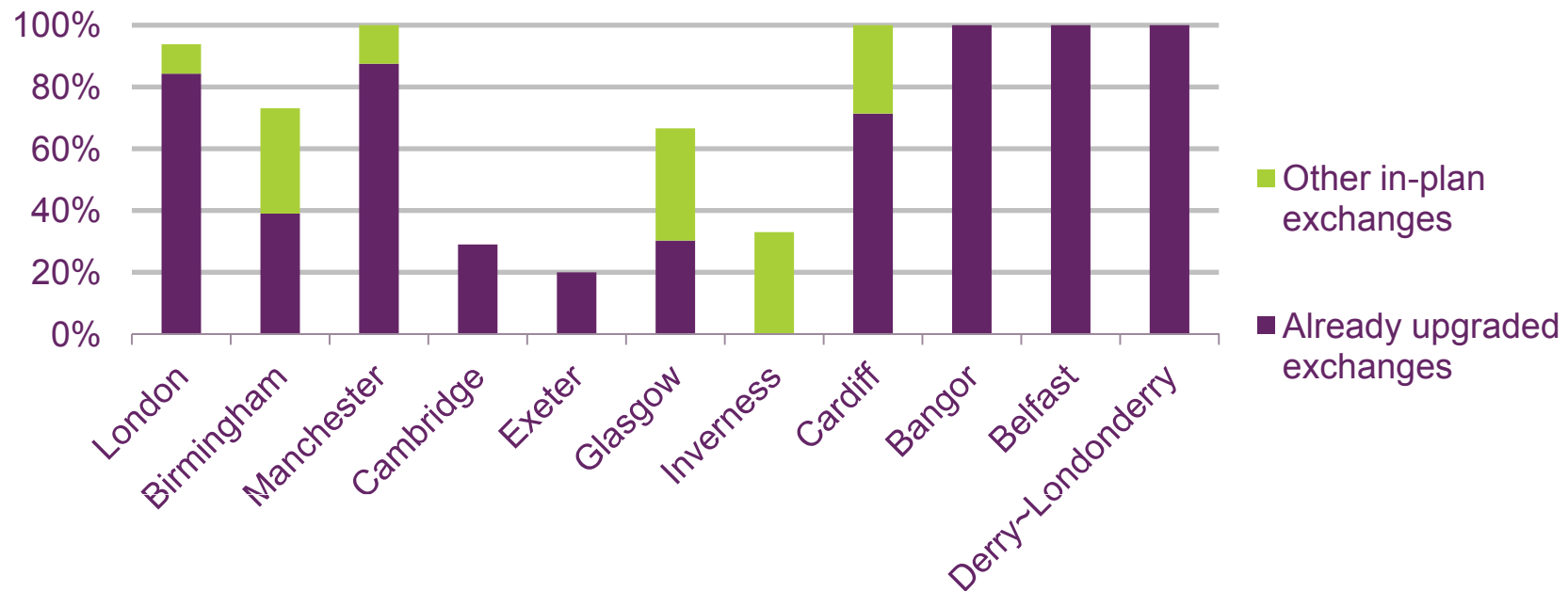
Source: Analysys Mason, Ofcom Infrastructure Report

Number of exchanges and % of lines with access to basic broadband

No. of exchanges serving city postcodes	% of lines that have access to both ADSL & ADSL Max	Average number of lines per exchange
15	100%	8800

Source: Analysys Mason

FTTC status of exchanges serving city postcodes according to BT's roll-out plans



Source: Analysys Mason

Key city hotspots data

City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
150	5.7	6.2	-8%

Source: Analysys Mason

3G mobile coverage in city

% of premises with 3G signal from 4 operators (city benchmark)	% of premises with 3G signal from 4 operators (11 city average)	% of premises with 3G signal from 4 operators (UK average)	Percentage difference from 11 city average
99%	95.7%	77.3%	+3.3%

Source: Analysys Mason, Ofcom Infrastructure Report

Key city exchange data

Ofcom classification	Number of the city exchanges	% of total exchanges	% of premises passed
3	12	80%	98%
2	2	13%	<2%
1	1	7%	<1%

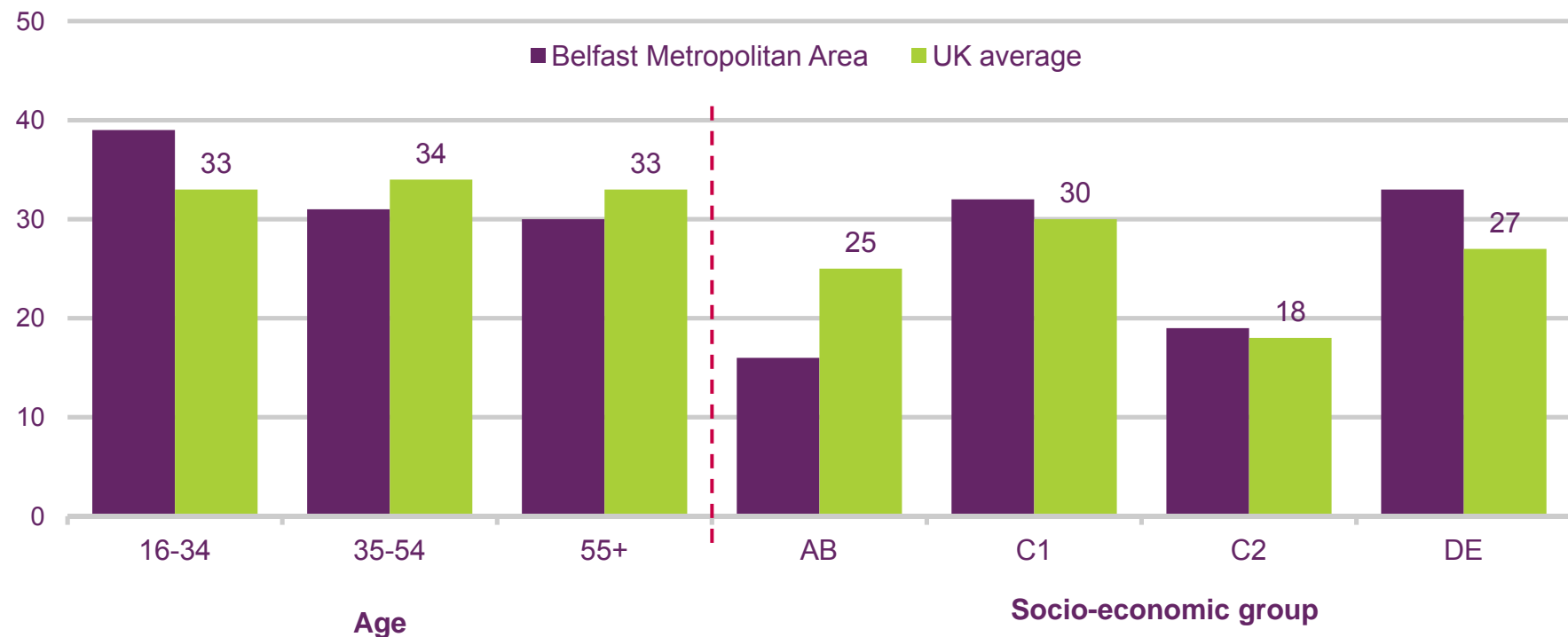
Source: Analysys Mason

Average maximum modem synch. speed compared to other cities

Excluding SFBB lines			Including SFBB lines			
Average maximum speed (Mbit/s)	City average (Mbit/s)	% difference from city average	Average maximum speed (Mbit/s)	City average (Mbit/s)	UK average (Mbit/s)	% difference from city average
16.1	14.1	+14%	37.2	29.9	12.7	+24%

Source: Analysys Mason, Ofcom Infrastructure Report

Age and SEG profile

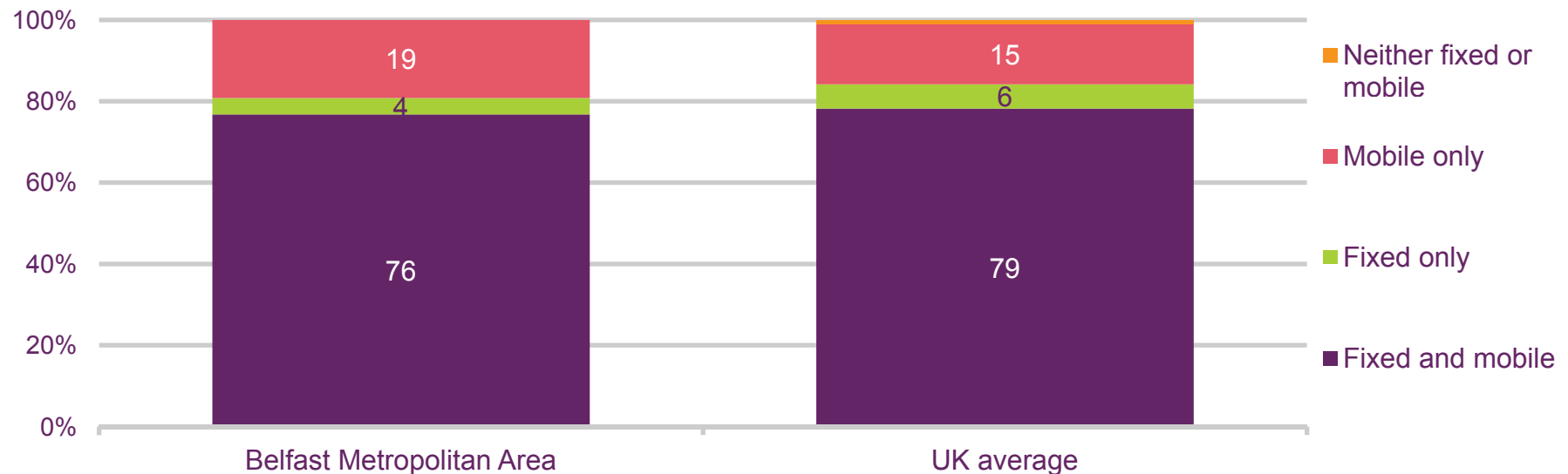


SF. What is your age?/ QZ8. What is the occupation of the main wage earner in your household?

Source: Ofcom research, Quarter 2 2012, Quarter 4 2012, Quarter 1 2013

Base: Adults aged 16+ (n = 319 Belfast Metropolitan Area, 9373 UK).

Household penetration of fixed and mobile telephony

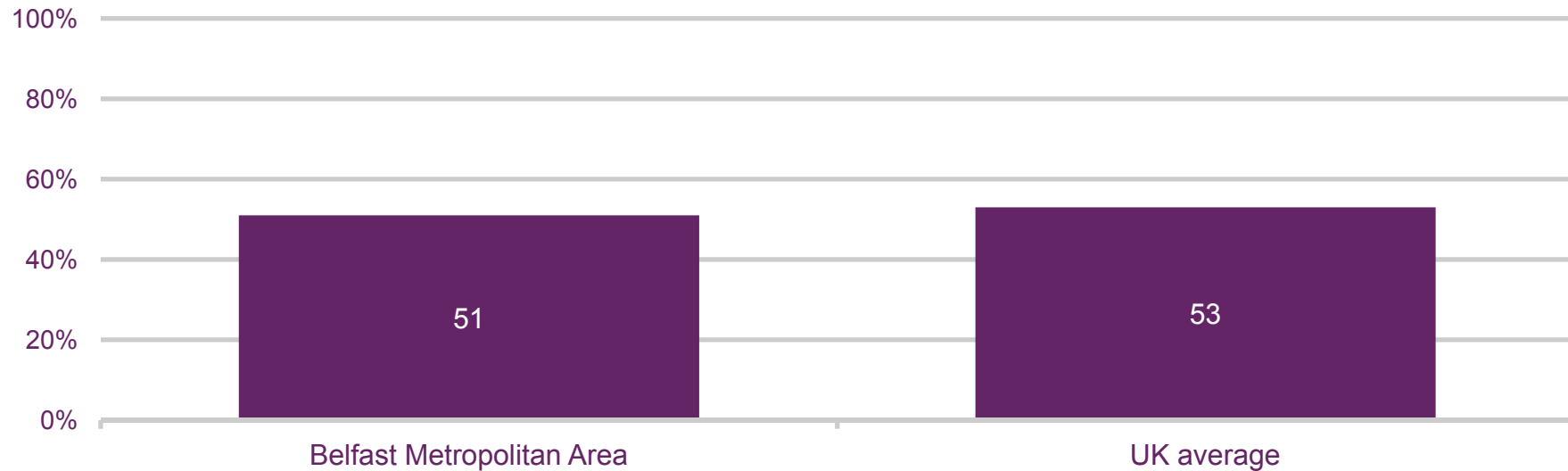


QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 2 2012, Quarter 4 2012, Quarter 1 2013

Base: Adults aged 16+ (n = 319 Belfast Metropolitan Area, 9373 UK).

Take-up of smartphones among mobile phone users

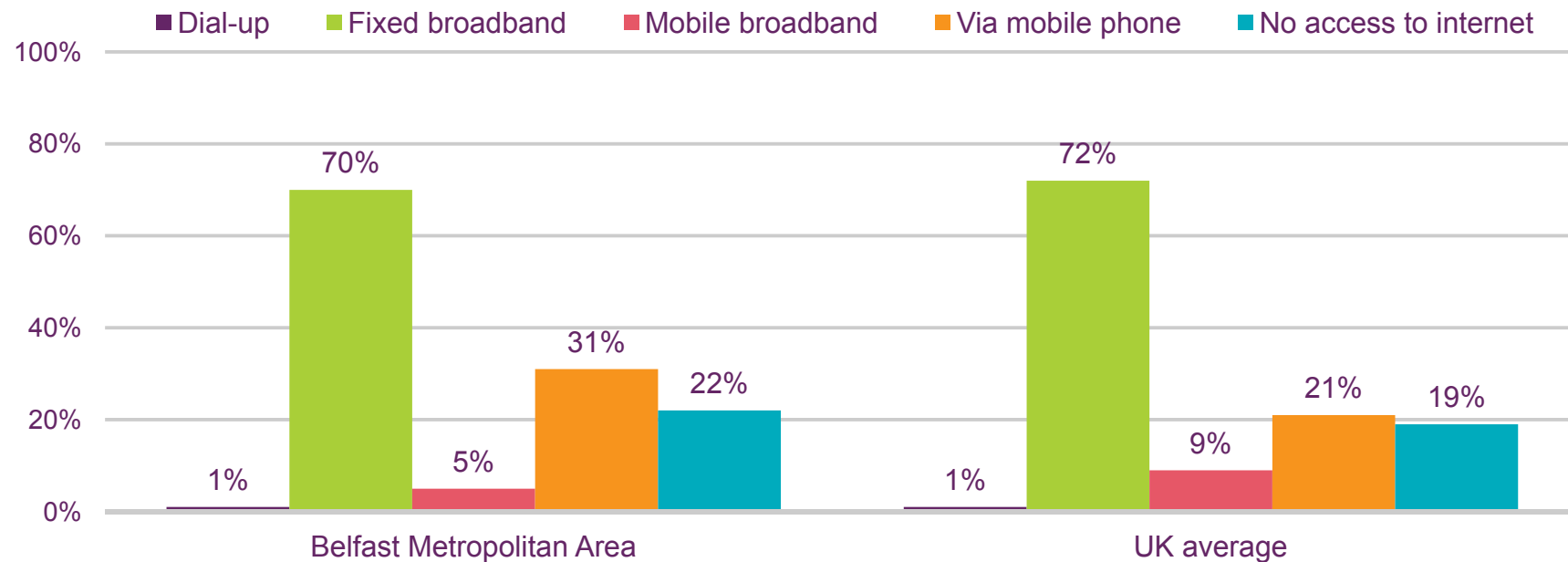


QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

Source: Ofcom research, Quarter 2 2012, Quarter 4 2012, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 243 Belfast Metropolitan Area, 9373 2582).

Internet access by type



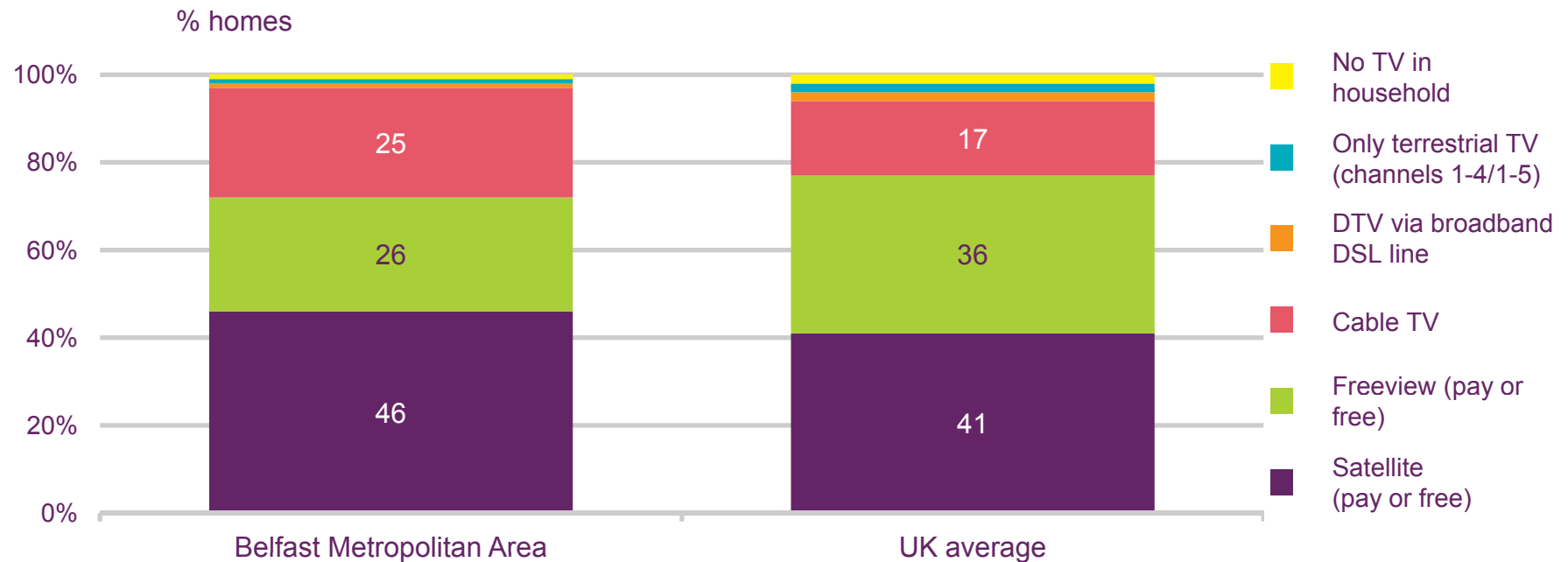
QE2. Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/

QE9. Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom research, Quarter 2 2012, Quarter 4 2012, Quarter 1 2013

Base: Adults aged 16+ (n = 319 Belfast Metropolitan Area, 9373 UK).

Main set TV share, by platform



QH1a/ QH1b. Which, if any, of these types of television does your household use at the moment?/ And which of these do you consider is your main type of television?

Source: Ofcom research, Quarter 2 2012, Quarter 4 2012, Quarter 1 2013

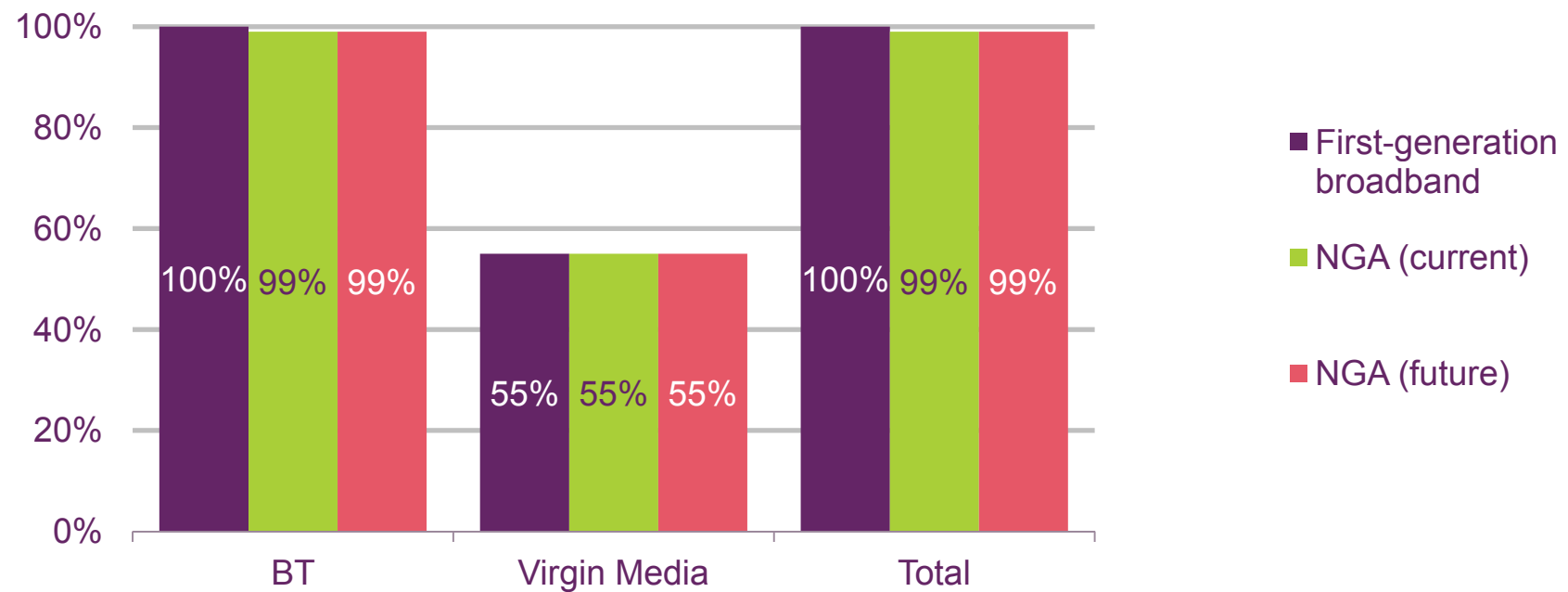
Base: Adults aged 16+ (n = 319 Belfast Metropolitan Area, 9373 UK).

City population and premises data

City	Population	Total premises	Business premises	Residential premises
Derry~Londonderry	c.110,000	c.43,000	c.2000	c.41,000

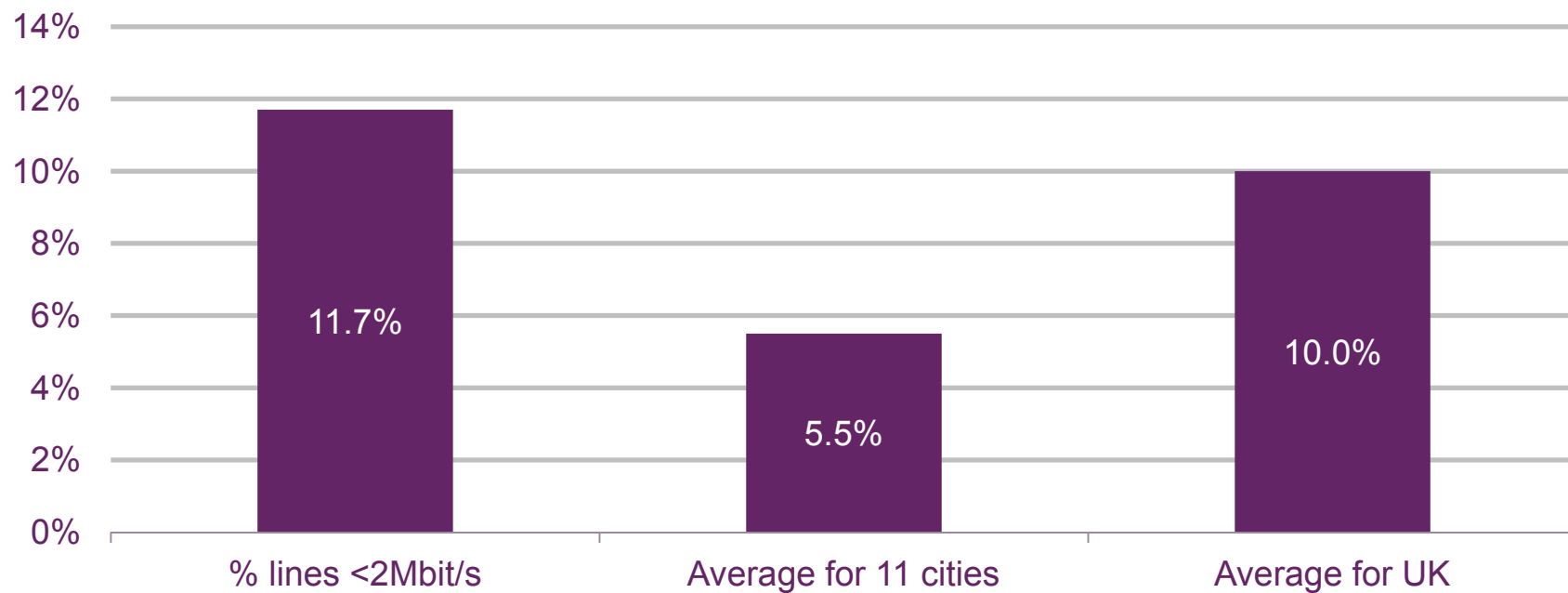
Source: Analysys Mason

Fixed network infrastructure premises passed availability



Source: Analysys Mason, Ofcom Infrastructure Report

Percentage of lines that have a speed of less than 2Mbit/s, and relative positioning



Source: Analysys Mason, Ofcom Infrastructure Report

Number of exchanges and % of lines with access to basic broadband

No. of exchanges serving city postcodes	% of lines that have access to both ADSL & ADSL Max	Average number of lines per exchange
10	100%	4300

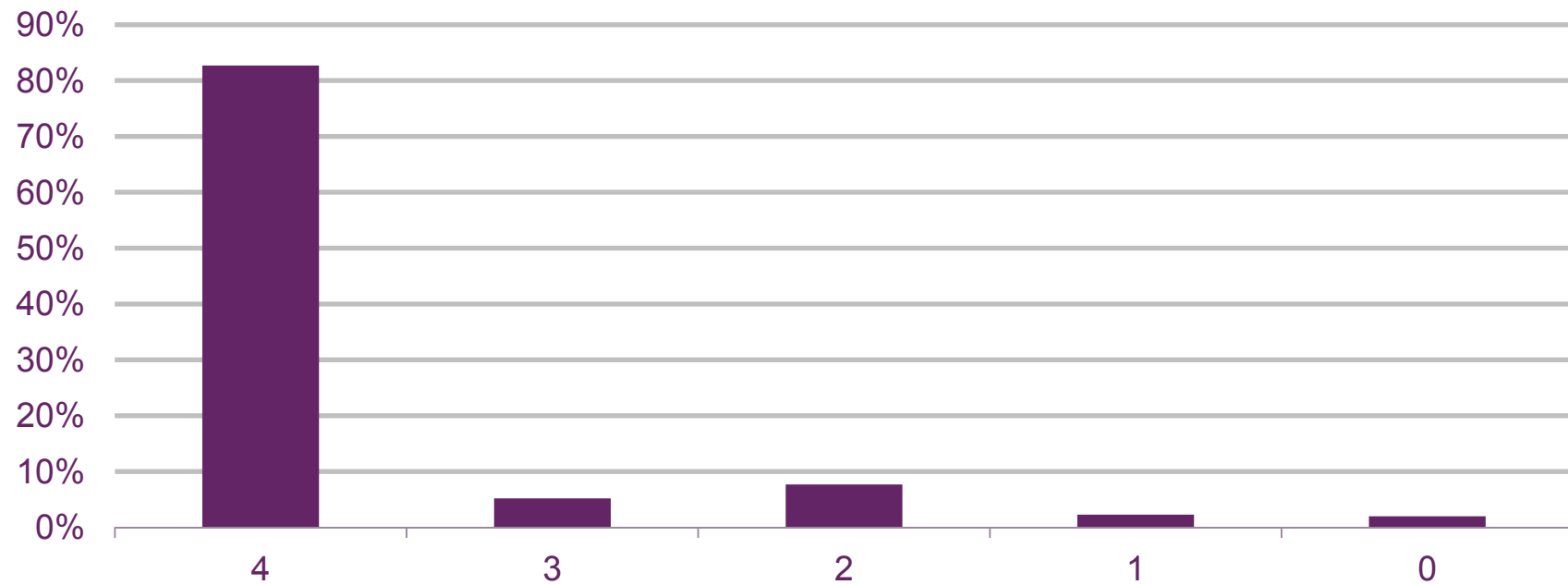
Source: Analysys Mason

Key city hotspots data

City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
20	1.8	6.2	-70%

Source: Analysys Mason

3G mobile coverage in city



Source: Analysys Mason

Key city exchange data

Ofcom classification	% of total exchanges	% of premises passed
3	30%	90%
2	20%	7%
1	50%	3%

Source: Analysys Mason

Average maximum modem synch. speed compared to other cities

Excluding SFBB lines			Including SFBB lines			
Average maximum speed (Mbit/s)	City average (Mbit/s)	% difference	Average maximum speed (Mbit/s)	City average (Mbit/s)	UK average (Mbit/s)	% difference
11.9	14.1	-15%	35	29.9	12.7	+17%

Source: Analysys Mason, Ofcom Infrastructure Report

TV and audio-visual

Take-up digital TV

Figure above bar shows % point change in take-up of digital TV from Q1 2012

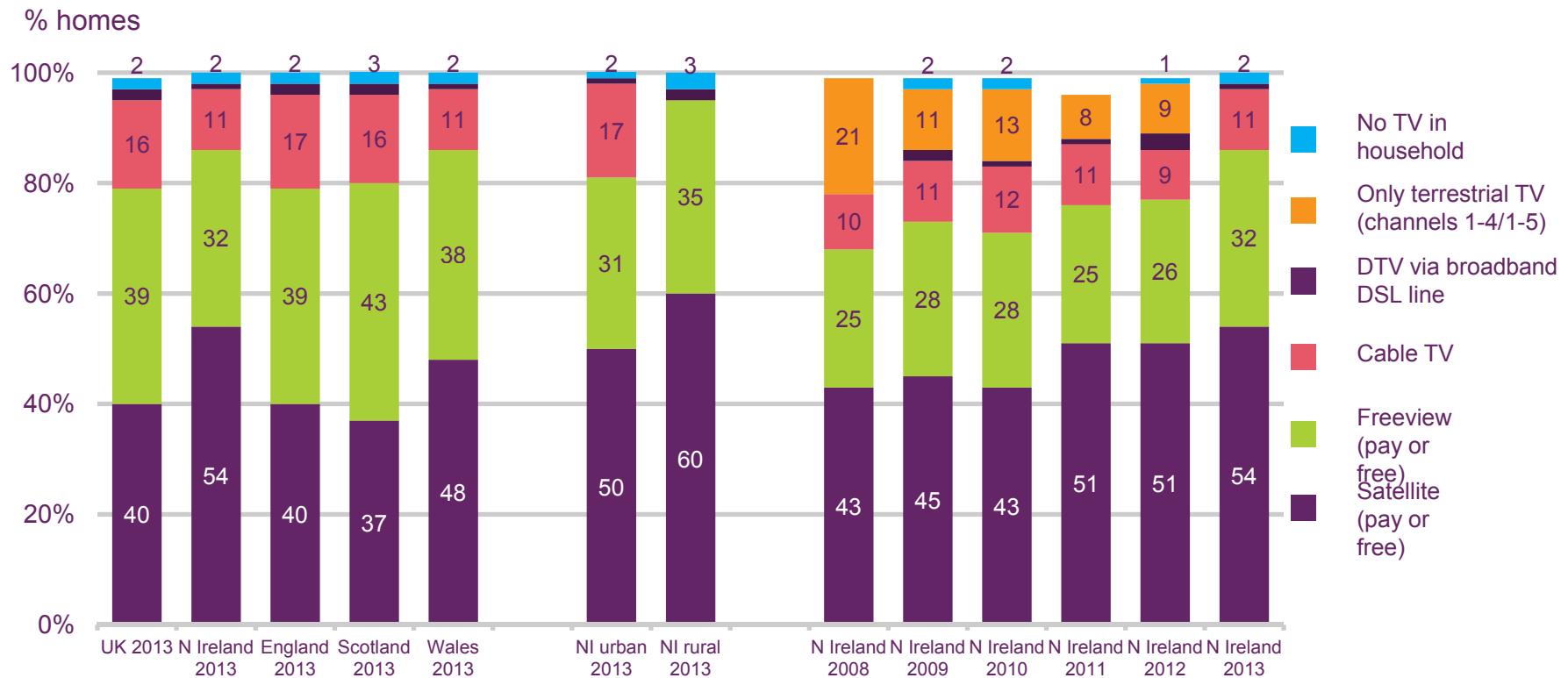


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 492 Northern Ireland, 2197 England, 487 Scotland, 485 Wales, 248 Northern Ireland urban, 244 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 492 Northern Ireland 2013)

Main TV set share by platform



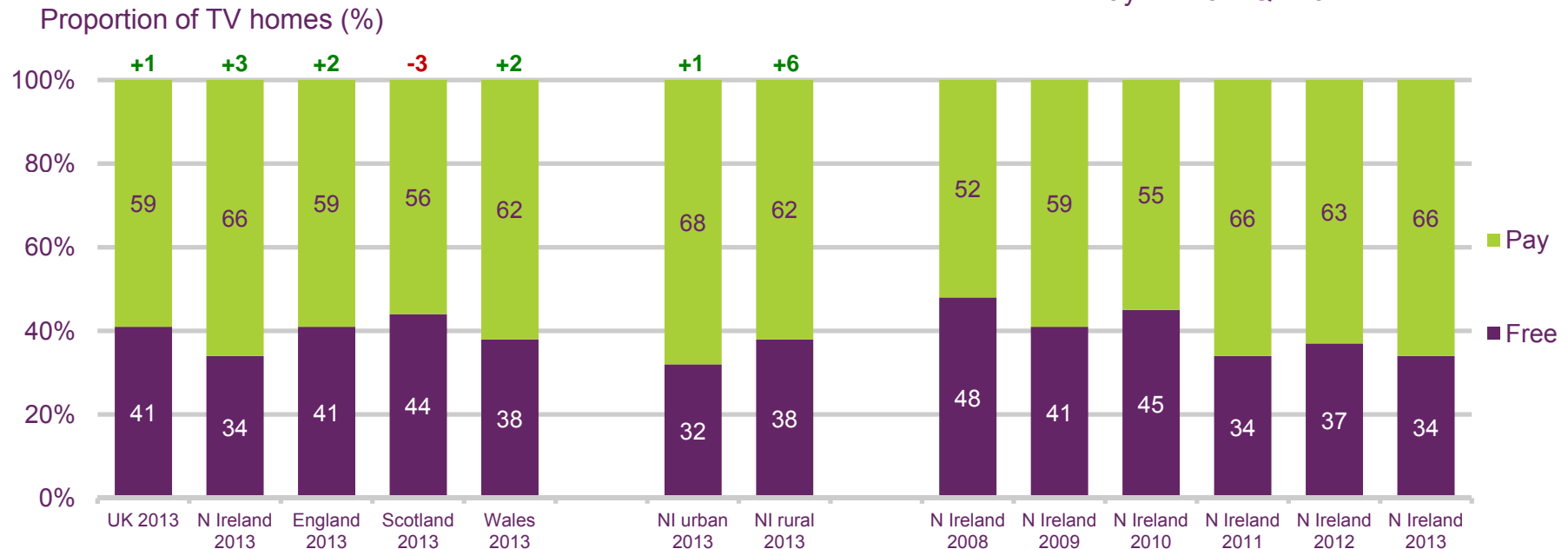
QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Proportion of TV homes with free and pay television

Figure above bar shows % point change in Pay TV from Q1 2012

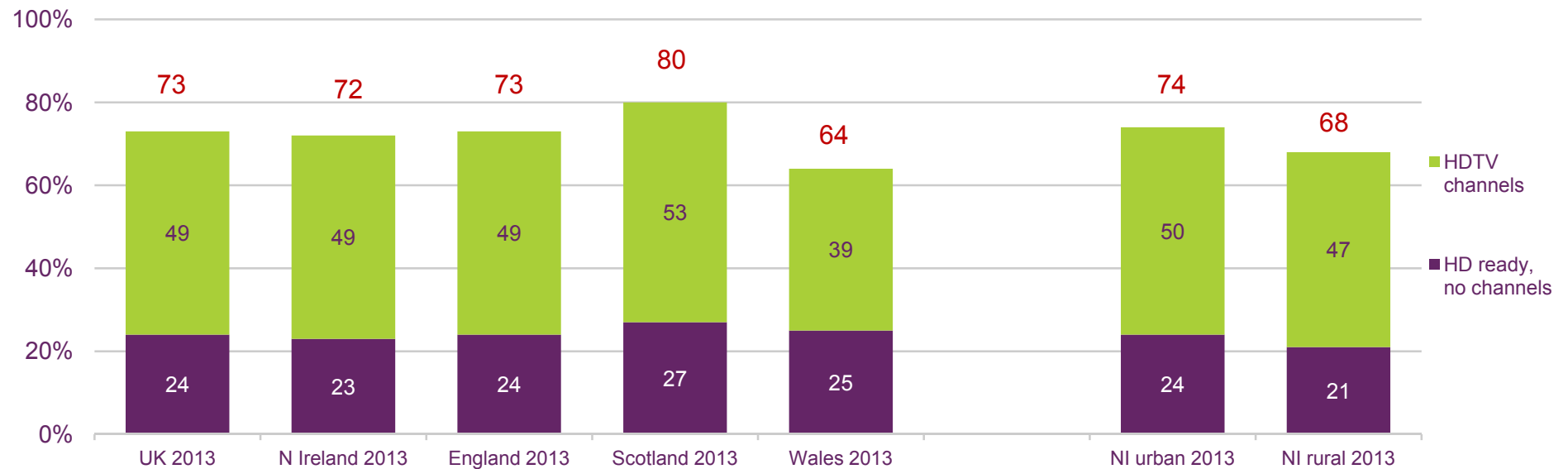


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 492 Northern Ireland, 2197 England, 487 Scotland, 485 Wales, 248 Northern Ireland urban, 244 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 492 Northern Ireland 2013)

Proportion of homes with HD television



QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural)

Smart TV take-up in Northern Ireland



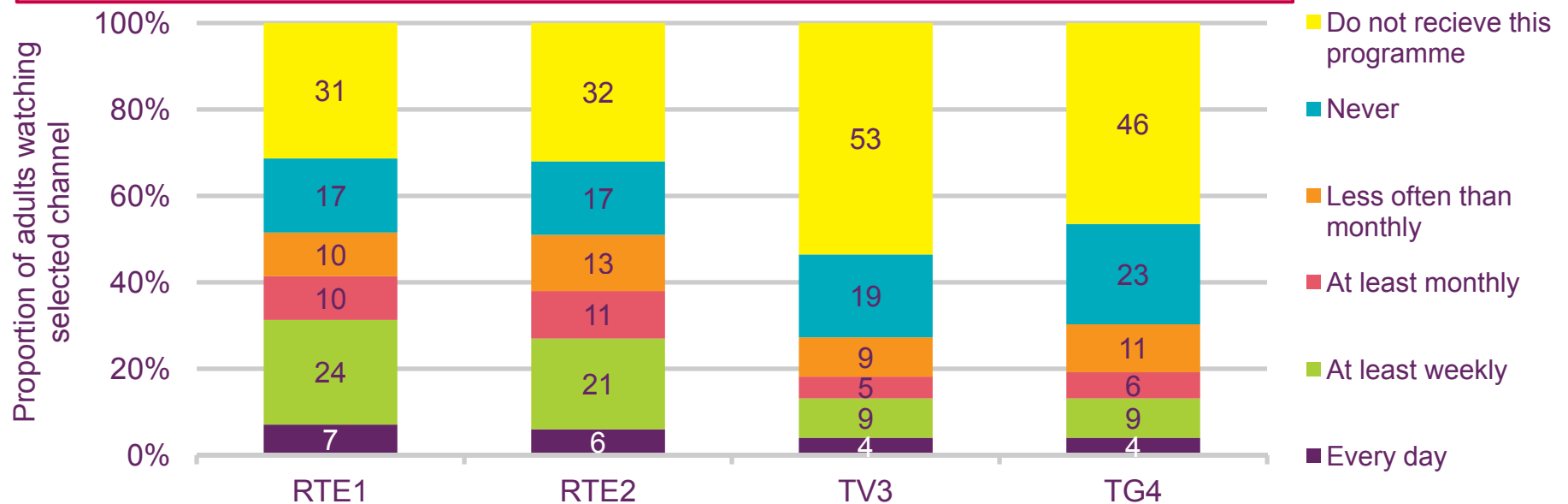
QH18. Are any of your TV sets “Smart TVs”? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 492 Northern Ireland, 2197 England, 487 Scotland, 485 Wales, 248 Northern Ireland urban, 244 Northern Ireland rural)

Claimed viewing of RoI originated TV channels in Northern Ireland

Ever watch	51%	50%	26%	29%
Watch at least monthly	41%	38%	18%	19%

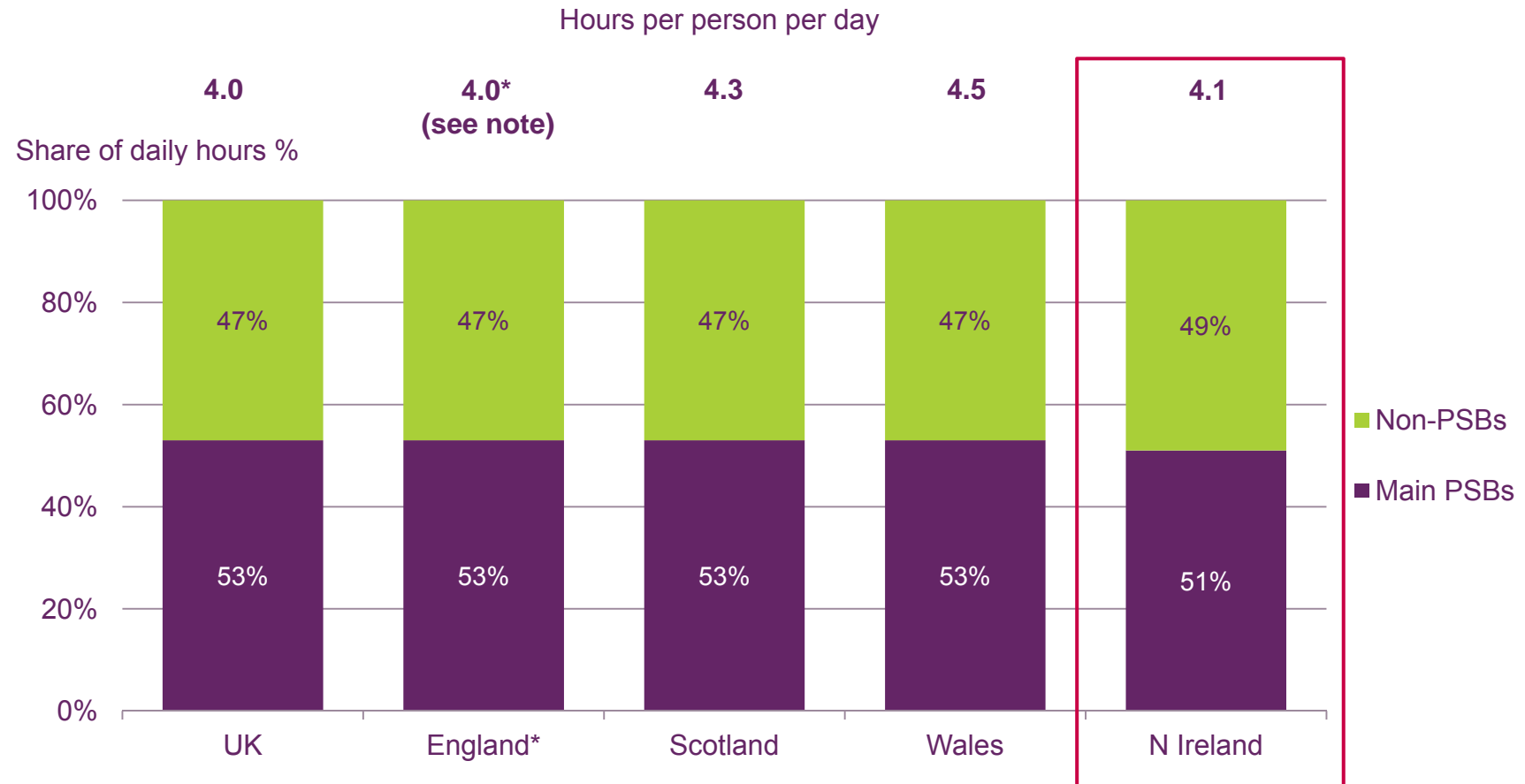


QH18/19. Which of these TV channels can you receive on your television/ How frequently, if at all, do you watch each of these channels?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ in Northern Ireland with a TV in household (n = 492)

Hours of daily TV viewing, by nation, 2012

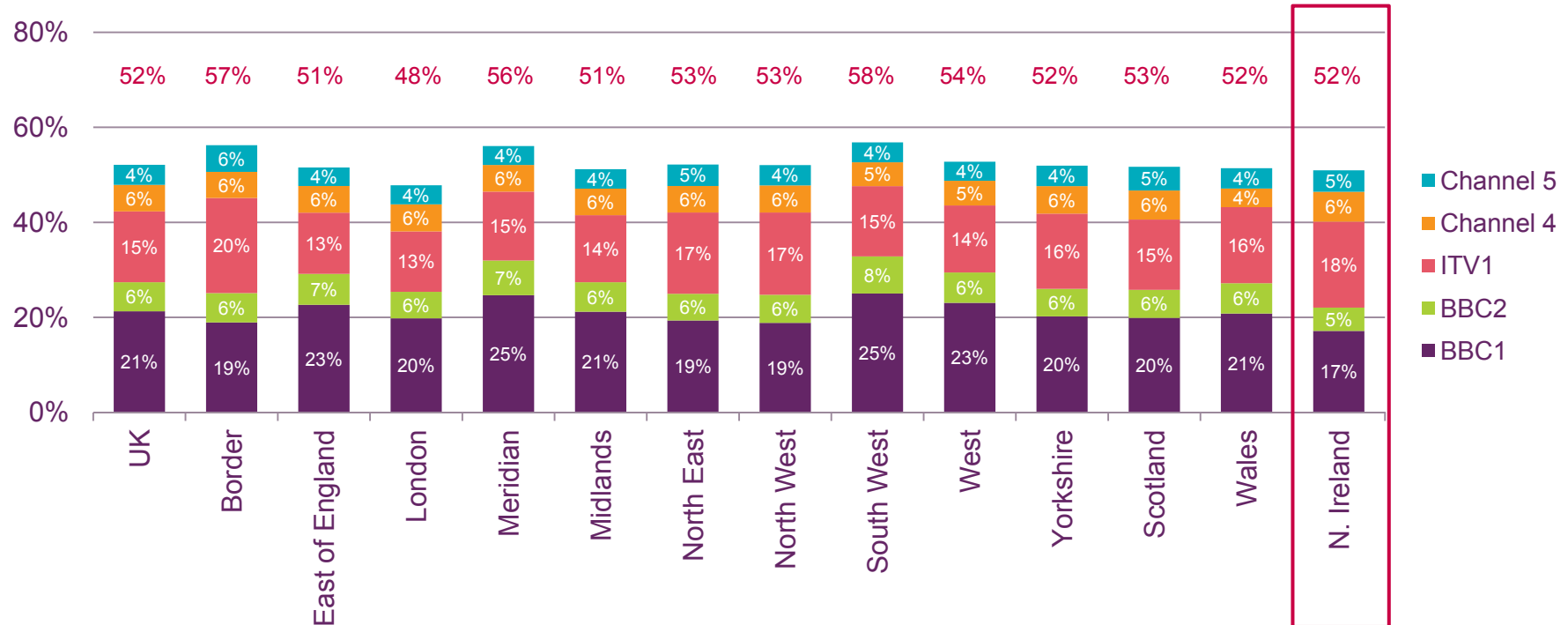


Source: TV = BARB. Based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Channel 5 including HD variants.

***Note: This figure reflects the average across the English regions with the highest in North East (4.4) and lowest in West (3.7) respectively.**

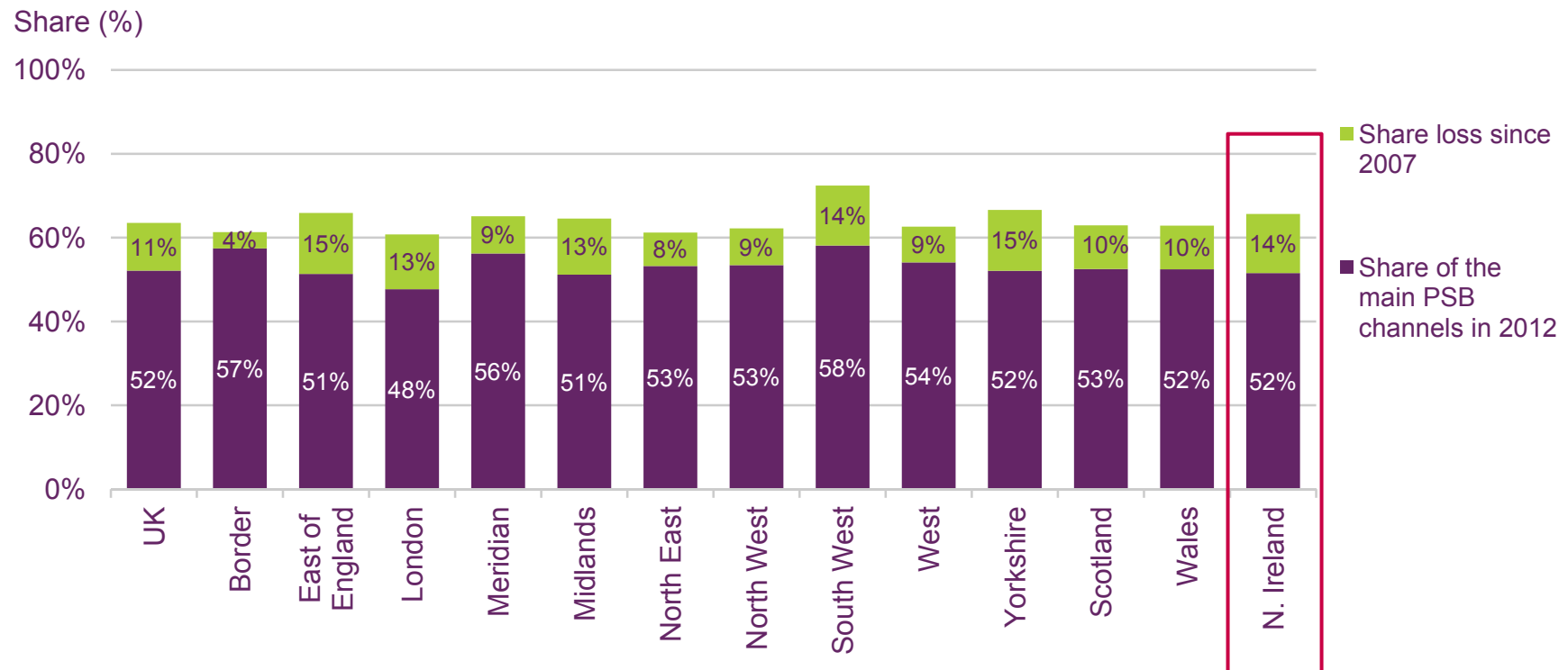
Share of the five main PSB channels in all homes, 2012

Audience share (%)



Source: BARB, all individuals (4+). HD channel variants are included.

Reduction in combined share of the five main PSB channels, all homes, 2007 & 2012

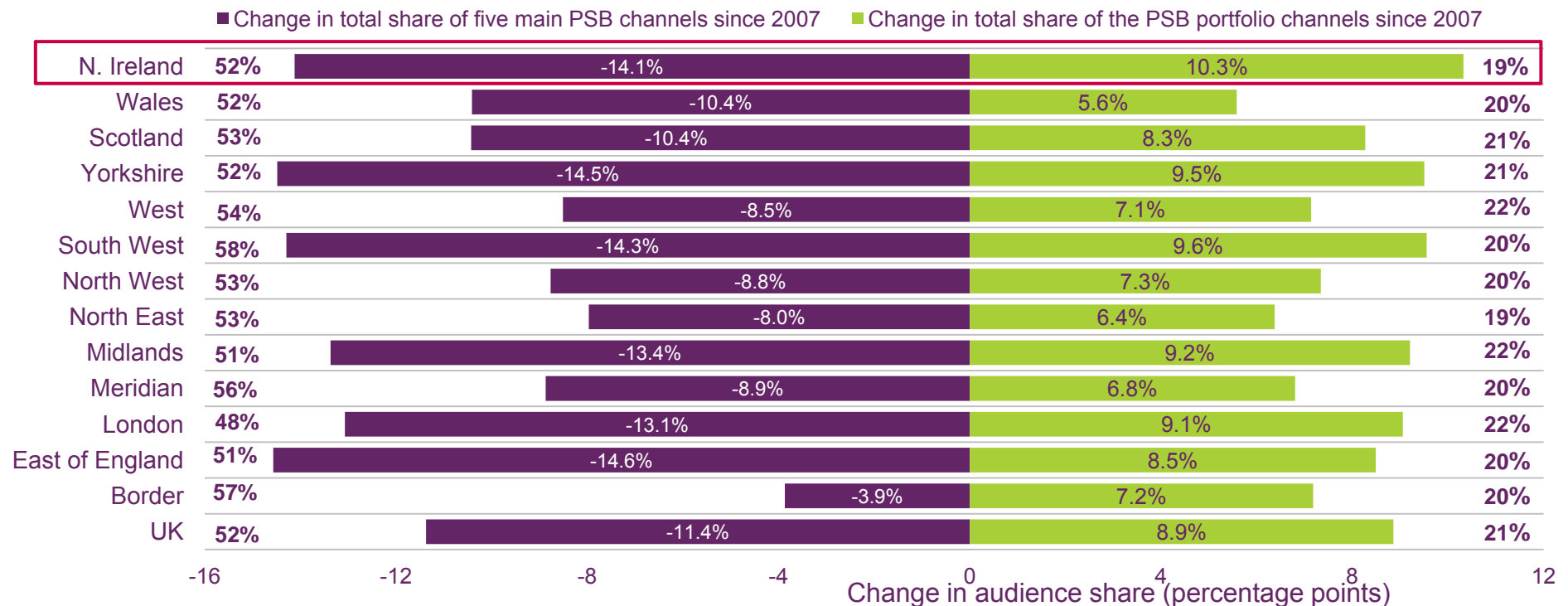


Source: BARB, all individuals (4+). HD channel variants are included.

Note : In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. S4C is included in the main PSB channels in 2007 but not in 2012.

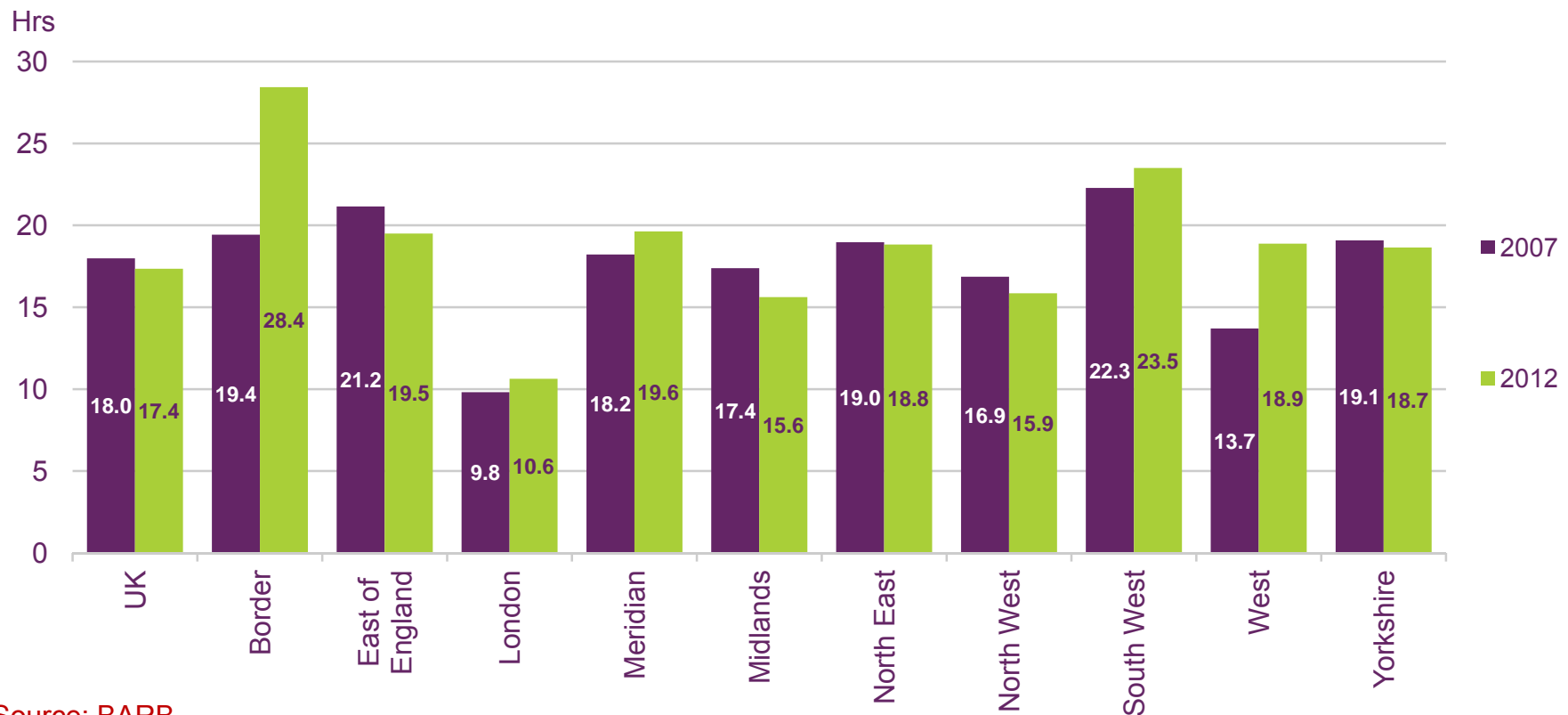
Net change in the audience share of the five main PSB channels and their portfolio channels, all homes, 2007 - 2012



Source: BARB, all individuals (4+)

Notes: i) PSB main channels include HD variants but not +1s. 'PSB portfolio channels' include main PSB +1 channels and the PSB digital channels and their respective +1s). ii) In 2010 C4 and S4C became two separate channels following digital switchover in Wales. S4C is included in the main PSB channels in 2007 but not in 2012. iii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

Combined total hours of viewing of early evening regional news bulletins, all homes in 2007-2012, by English region

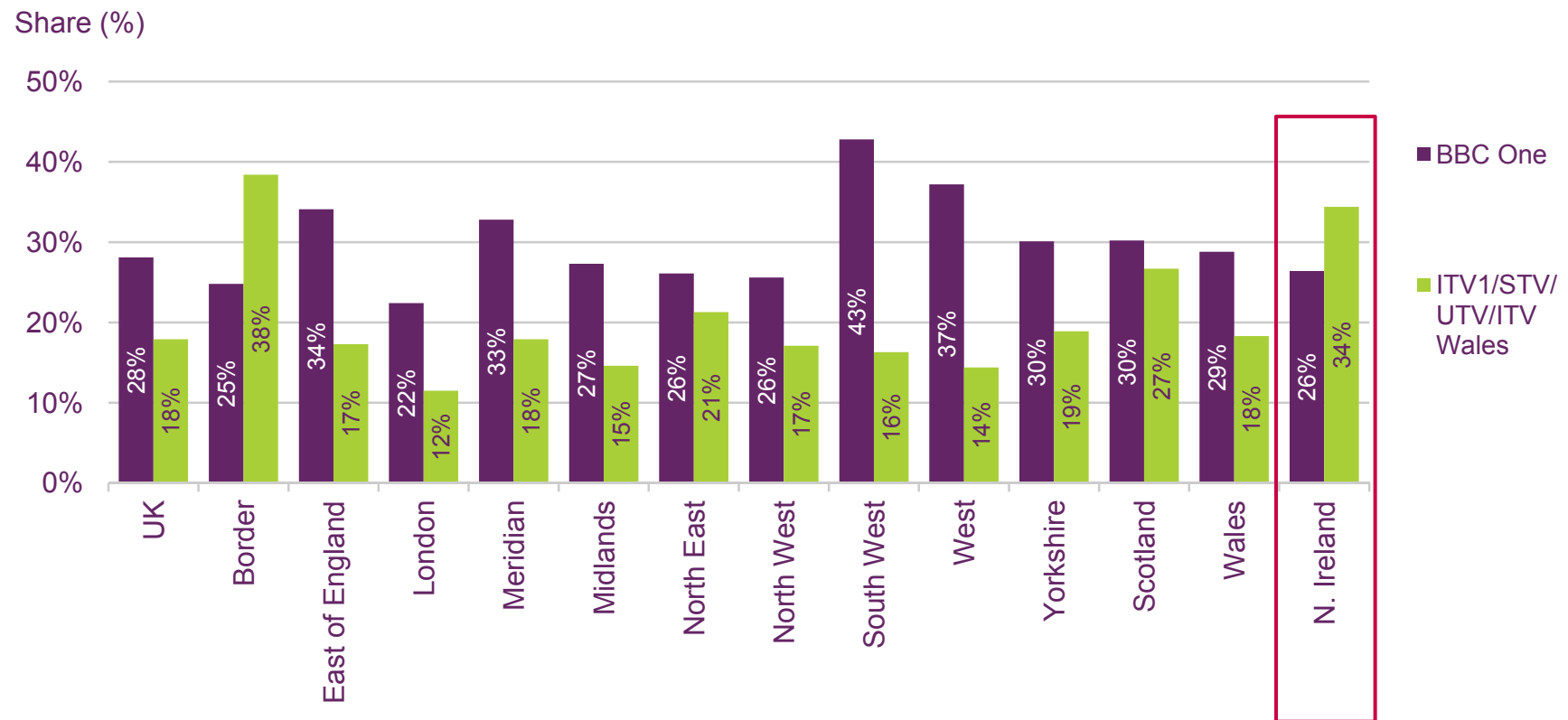


Source: BARB

Note: Based on total minutes of viewing to Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV, weekdays

Notes: In 2010 a new BARB panel was introduced, including the re-defining of boundaries and in some cases (e.g. Border) a change of universe and sample. Therefore, pre and post panel change data should be compared with some caution.

BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, all homes, 2012

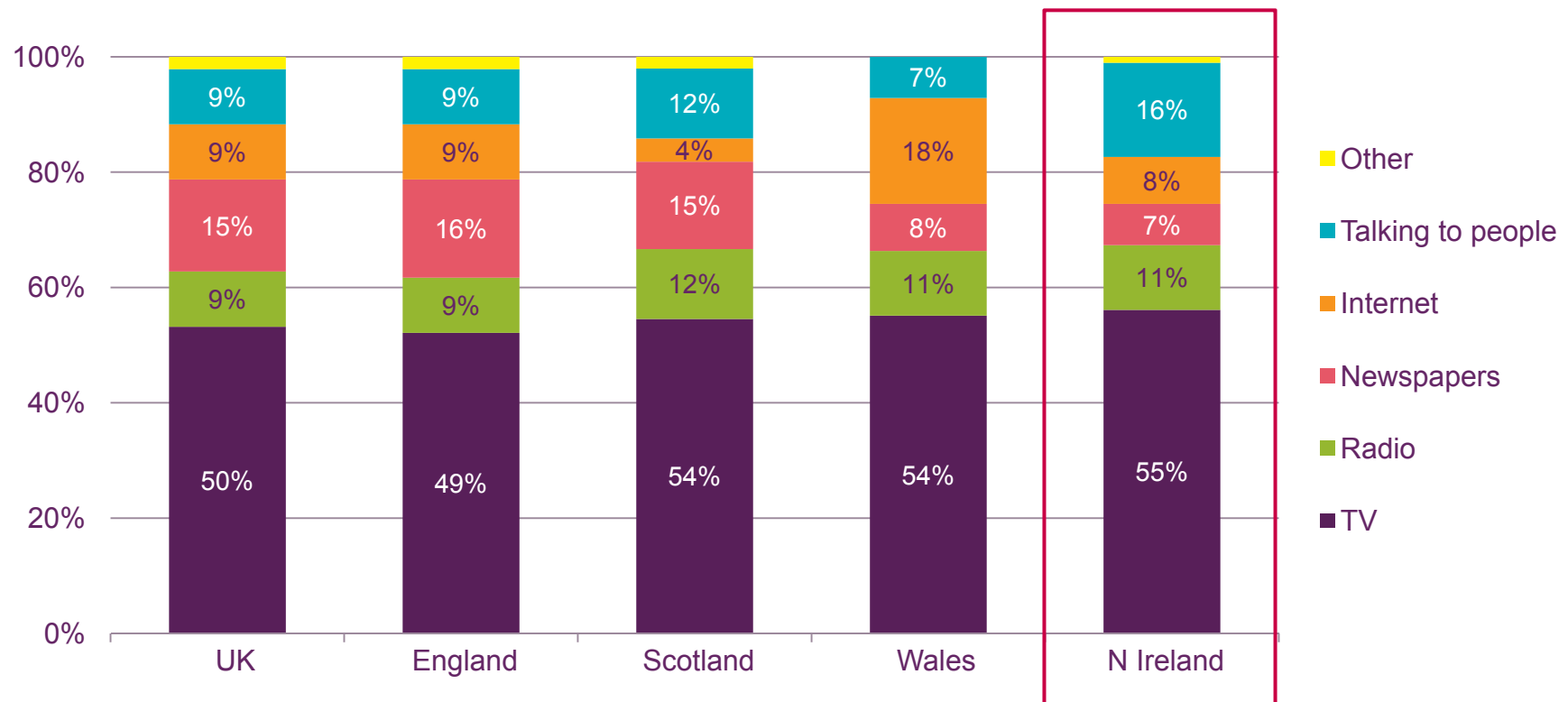


Source: BARB, all individuals (4+)

Note: Based on Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV (exc HD), weekdays. UK share for ITV includes HD.

Sources of local news for each nation

‘Can you tell me what, if anything, is your main source of news about what is going on in your own local area’



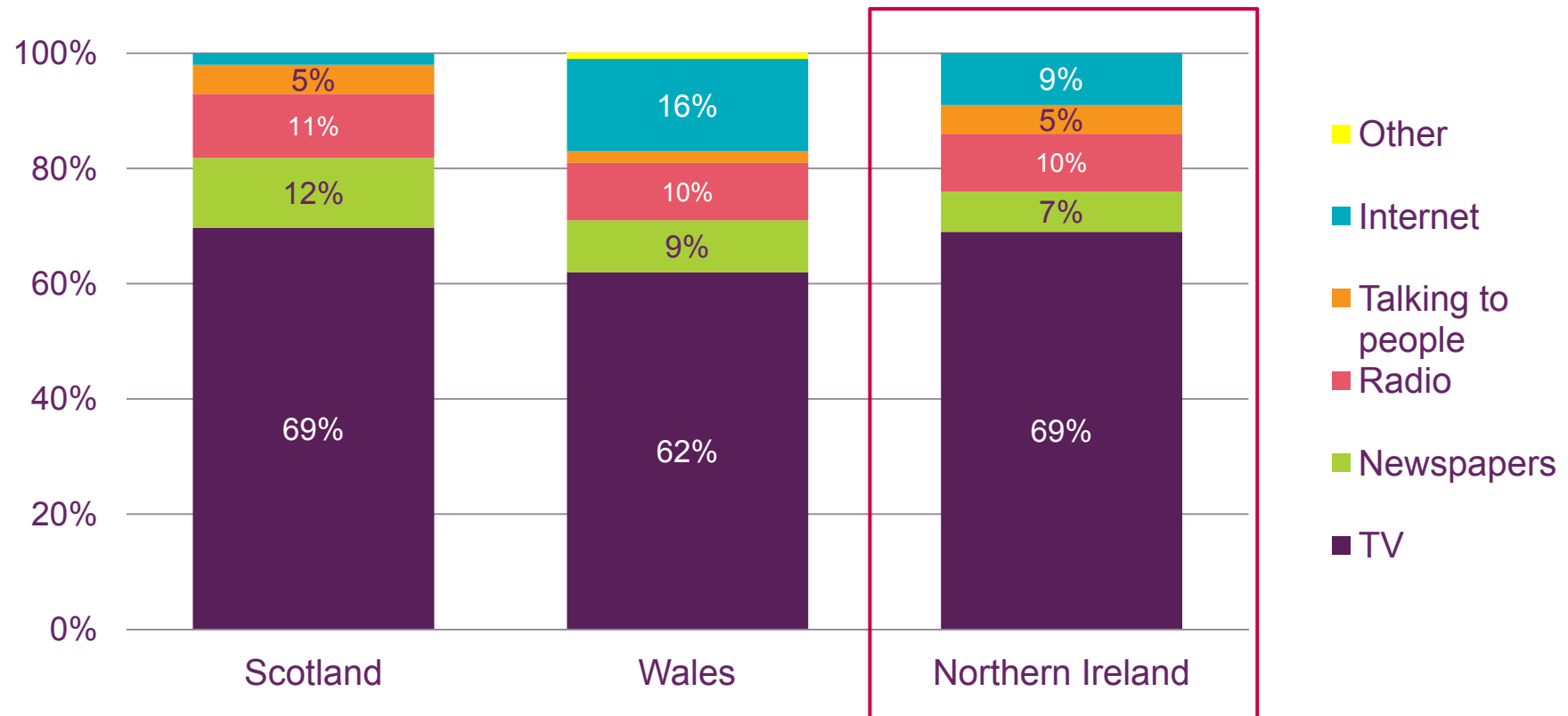
Source: Ofcom Media tracker 2012.

Base: All adults; England (1,434); Scotland (189); Wales (118); Northern Ireland (113).

Only responses $\geq 3\%$ labelled

Sources of Nations news for each nation

‘Can you tell me what, if anything, is your **main** source of news about what is going on in [Scotland, Wales, Northern Ireland]?’



Source: Ofcom Media tracker.

Base: All respondents in Scotland (189), Wales (118), Northern Ireland (113). Only responses $\geq 3\%$ labelled.

Online TV/ video viewing

Online TV/ video viewing on PC or mobile

Proportion of individuals with broadband at home

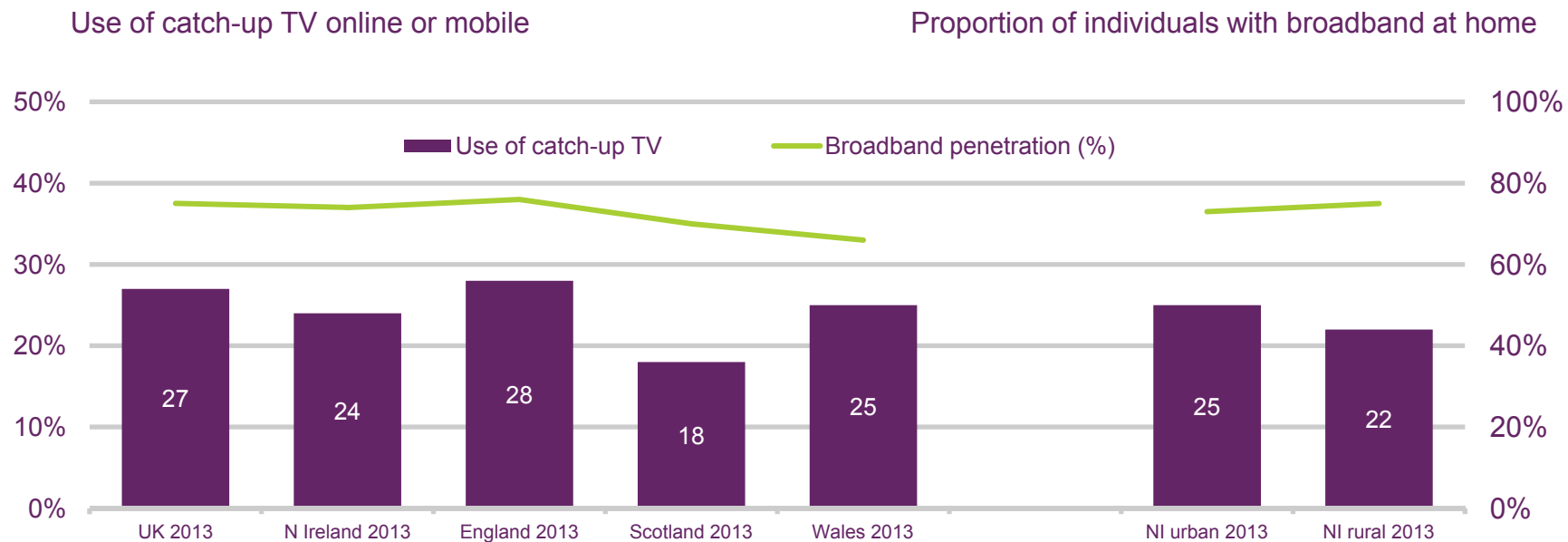


QE5A-B. Which, if any, of these do you use the internet for? And, which, if any, of these activities have you used the internet for in the last week? QD28A-B. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? And which of these activities have you used your mobile for in the last week? NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Use of catch-up TV

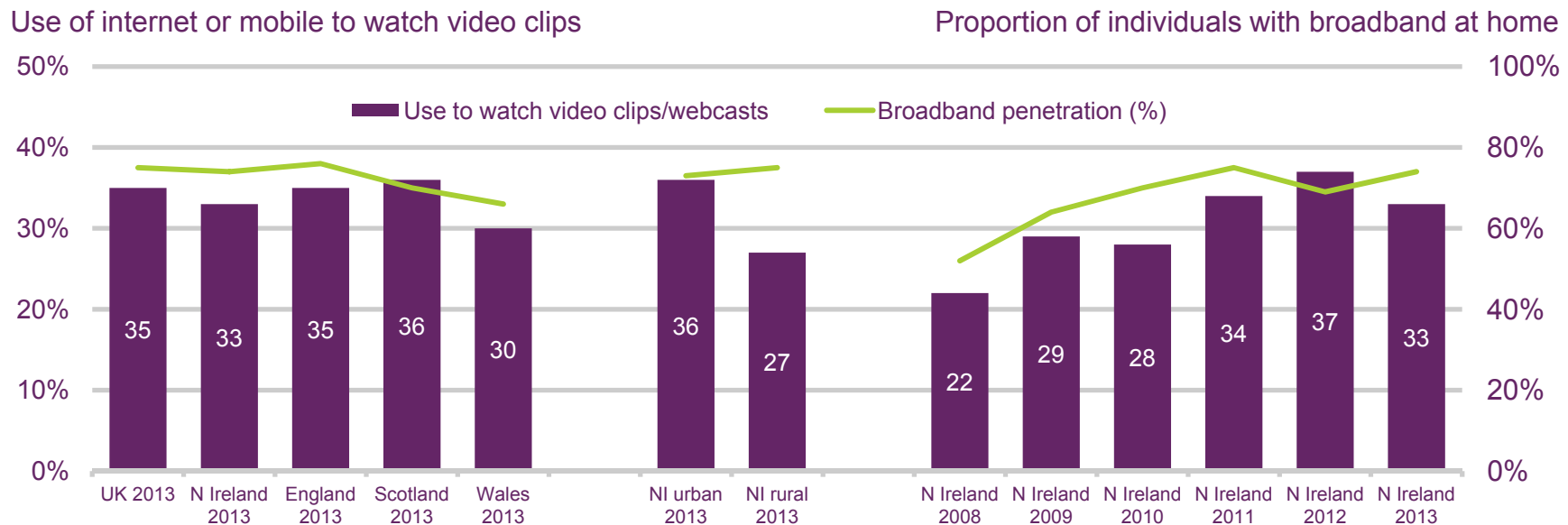


QE5A. Which, if any, of these do you use the internet for?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Use of internet for watching video clips/webcasts (e.g. YouTube)



QE5A. Which, if any, of these do you use the internet for?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales, 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Use of non-linear TV



Watch 'on demand' TV

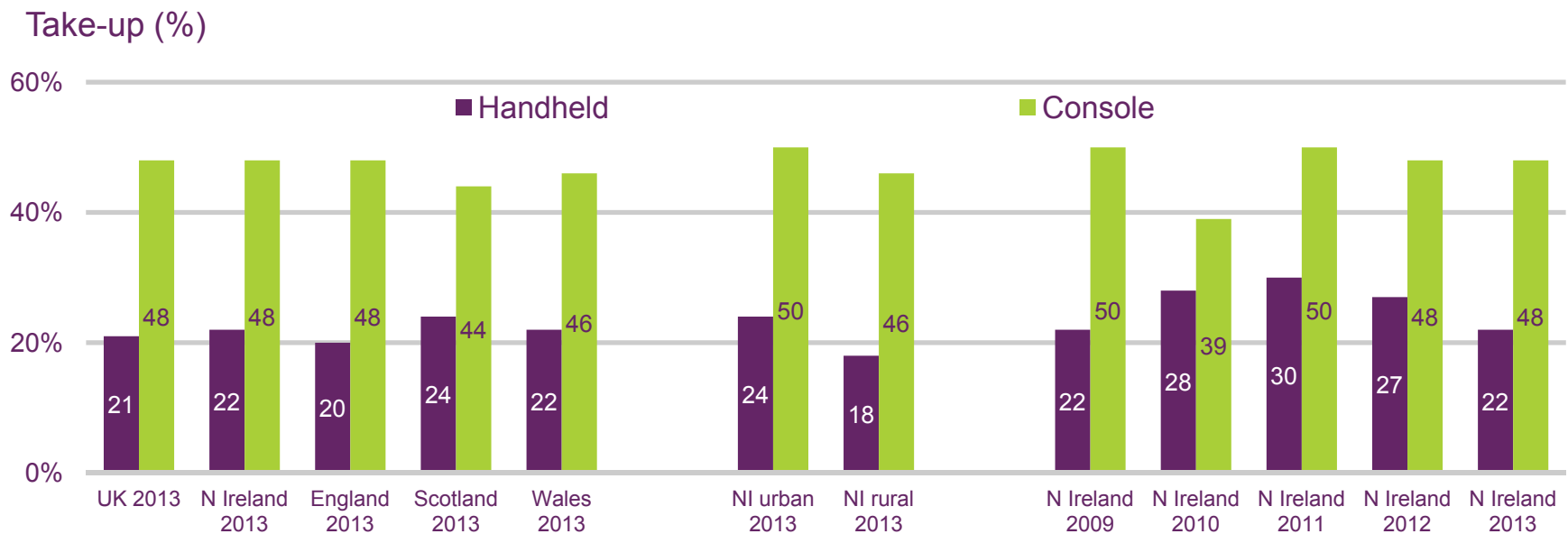
Watch/ download programmes from broadcasters' websites

QH42A. Do you ever watch TV programmes 'on demand' through your TV service? By this I mean pay-per-view programmes or using the TV catch-up services that allow you to watch some of the programmes shown in the last week, through services such as Sky Anytime+ or Virgin media Catch-up TV./ QH43A. Do you ever watch TV programmes online or download programmes from TV broadcasters' websites (such as BBC iPlayer, ITV Player, Channel 4 On-Demand, Demand Five or Sky Player) after they've been shown?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales)

Take up of leading games consoles in Northern Ireland



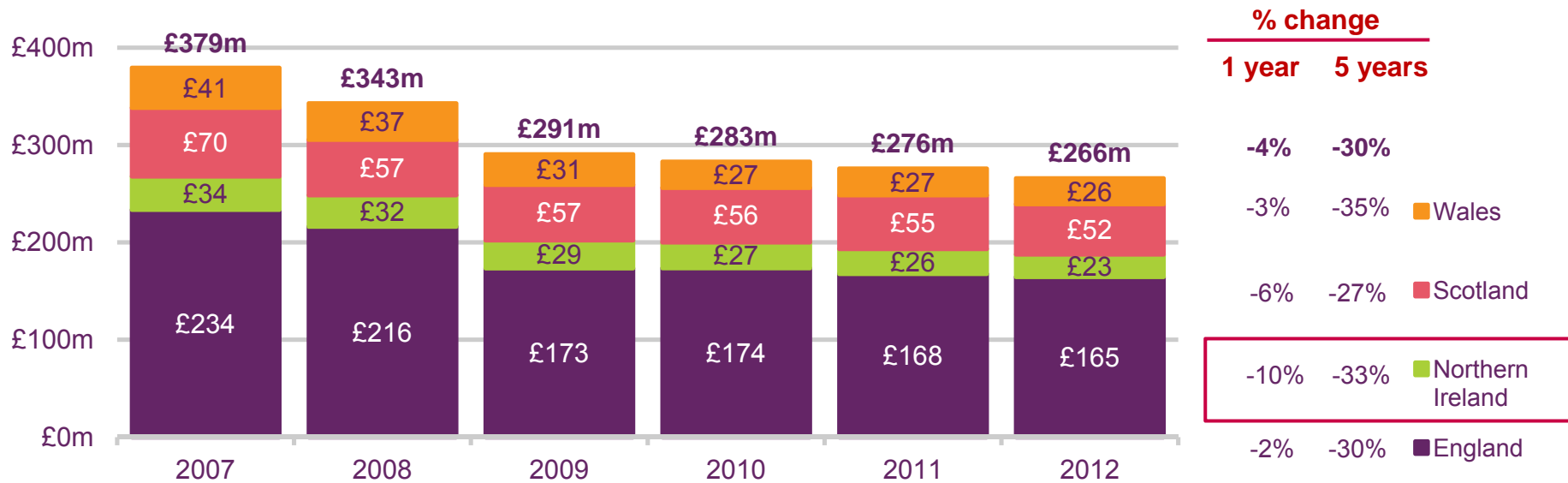
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Spend on first-run originated nations' and regions' output by the BBC/ITV1/STV/UTV

Spend



Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend data for first-run originations only. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

Change in total spend, by genre and nation, 2007 - 2012

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current Affairs	-5%	-28%	-8%	-36%	5%	-28%	-3%	6%	-5%	-31%
News	-3%	-22%	-1%	-21%	-2%	-21%	-13%	-32%	-14%	-22%
Non-news/non-current affairs	-5%	-43%	7%	-86%	-19%	-41%	-5%	-27%	8%	-40%
Total Spend in 2012	£271m		£168m		£23m		£53m		£27m	

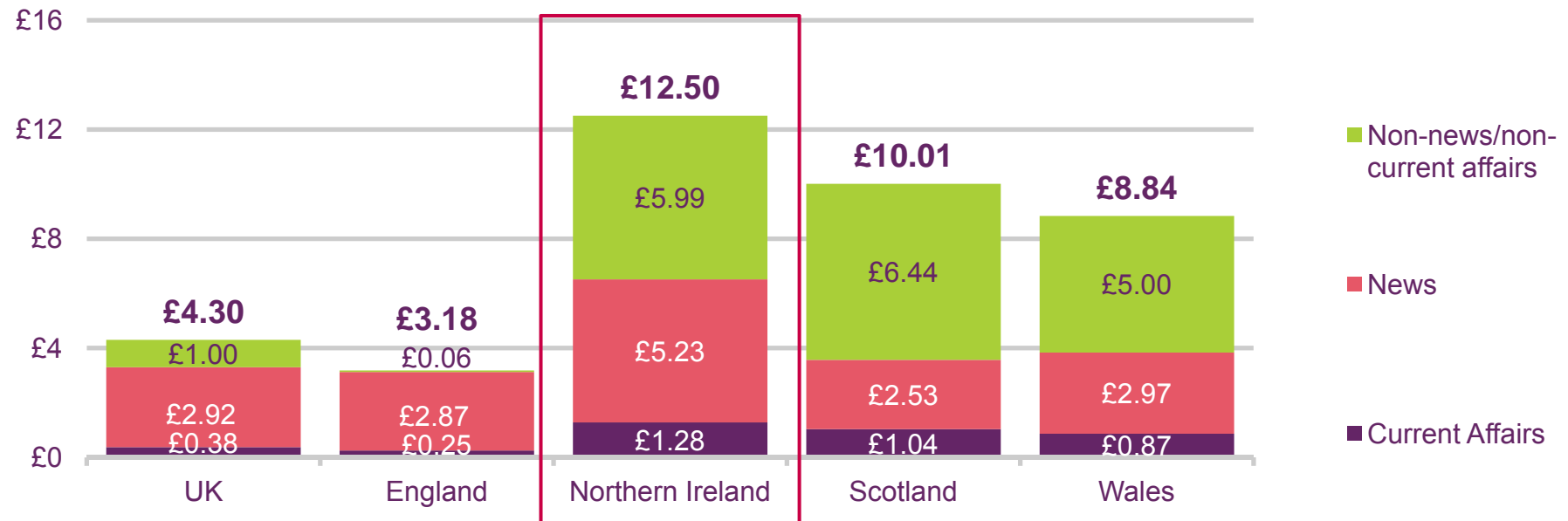
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-4%	-29%	-2%	-28%	-10%	-33%	-7%	-26%	-2%	-34%

Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

Total spend per head by the BBC/ITV1/STV/UTV in nations/regions output: 2012

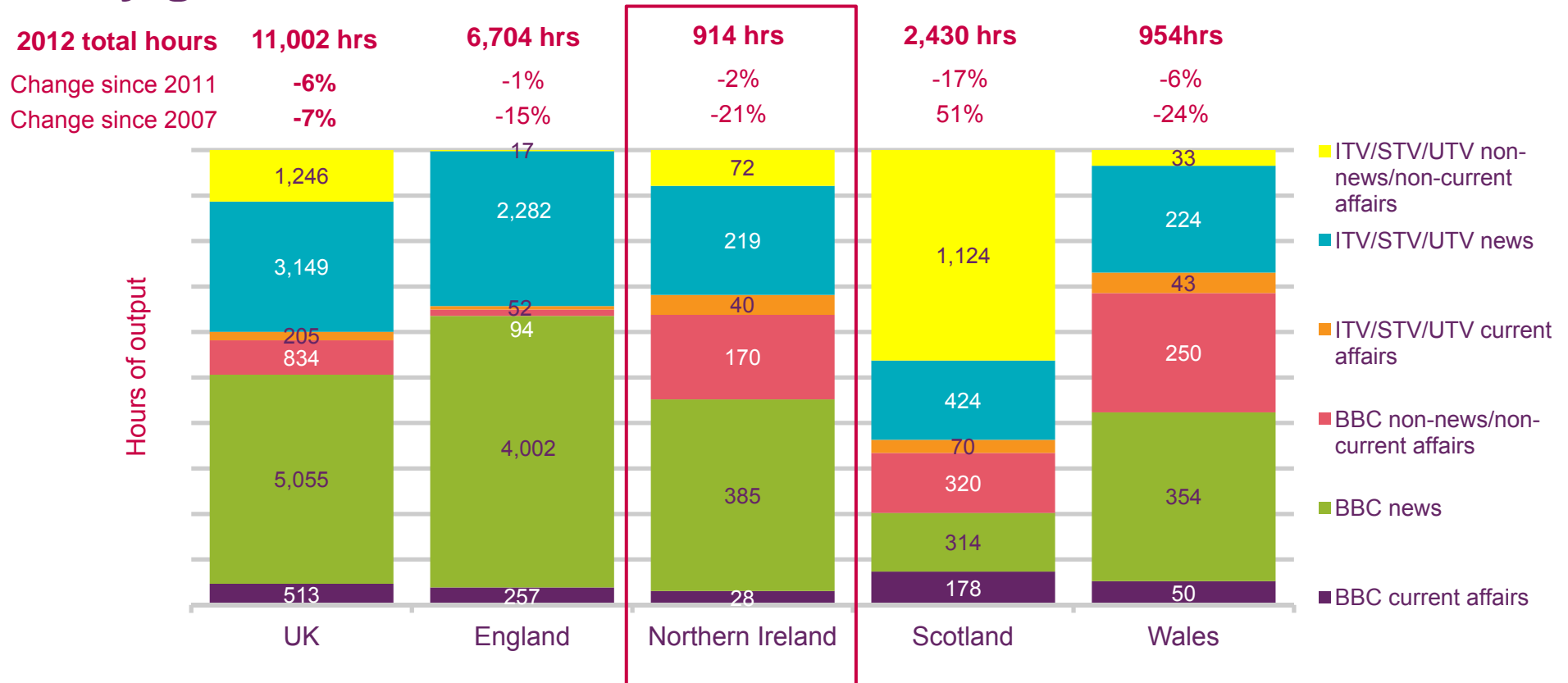
Spend per head



Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

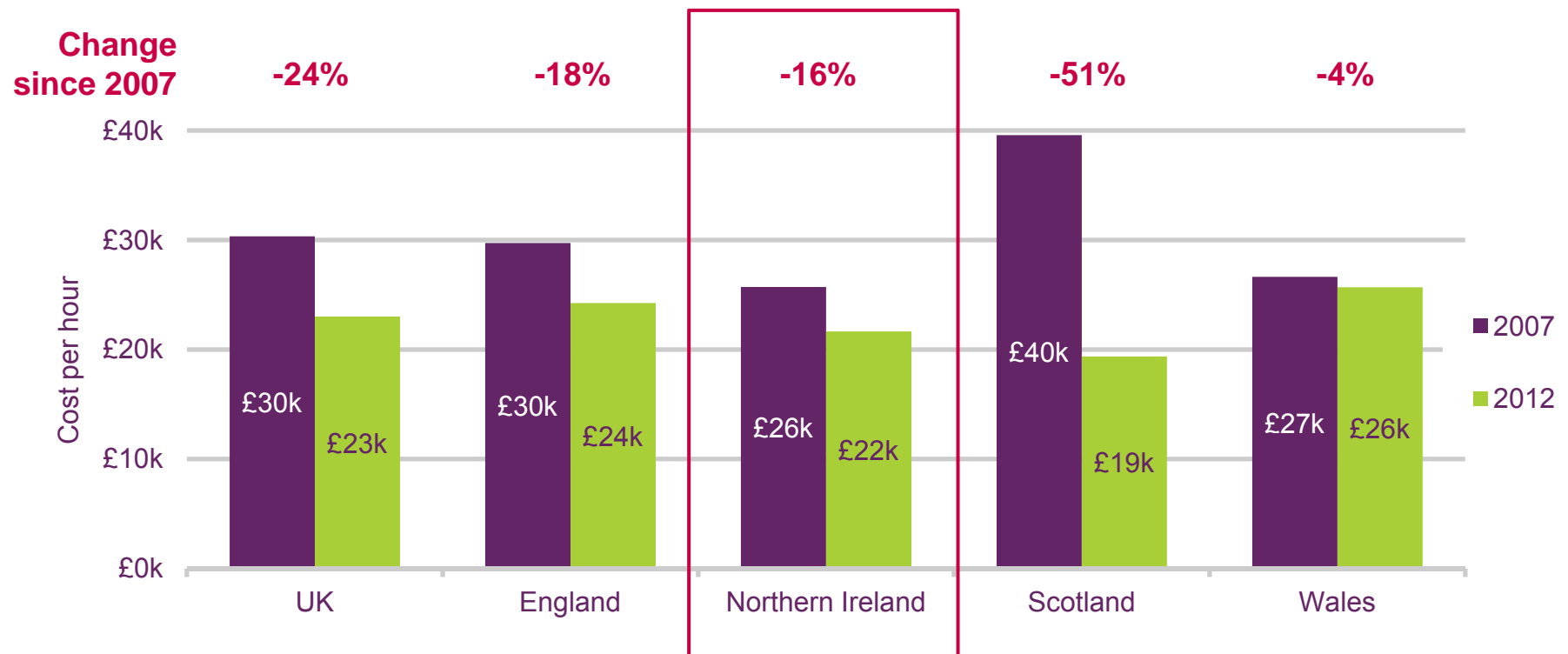
First-run originated hours of nations/regions output, by genre and broadcaster: 2012



Source: Broadcasters.

Note: Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not include total hours for BBC Alba or BBC hours on S4C output.

Total output cost per hour, by nation: 2007 – 2012

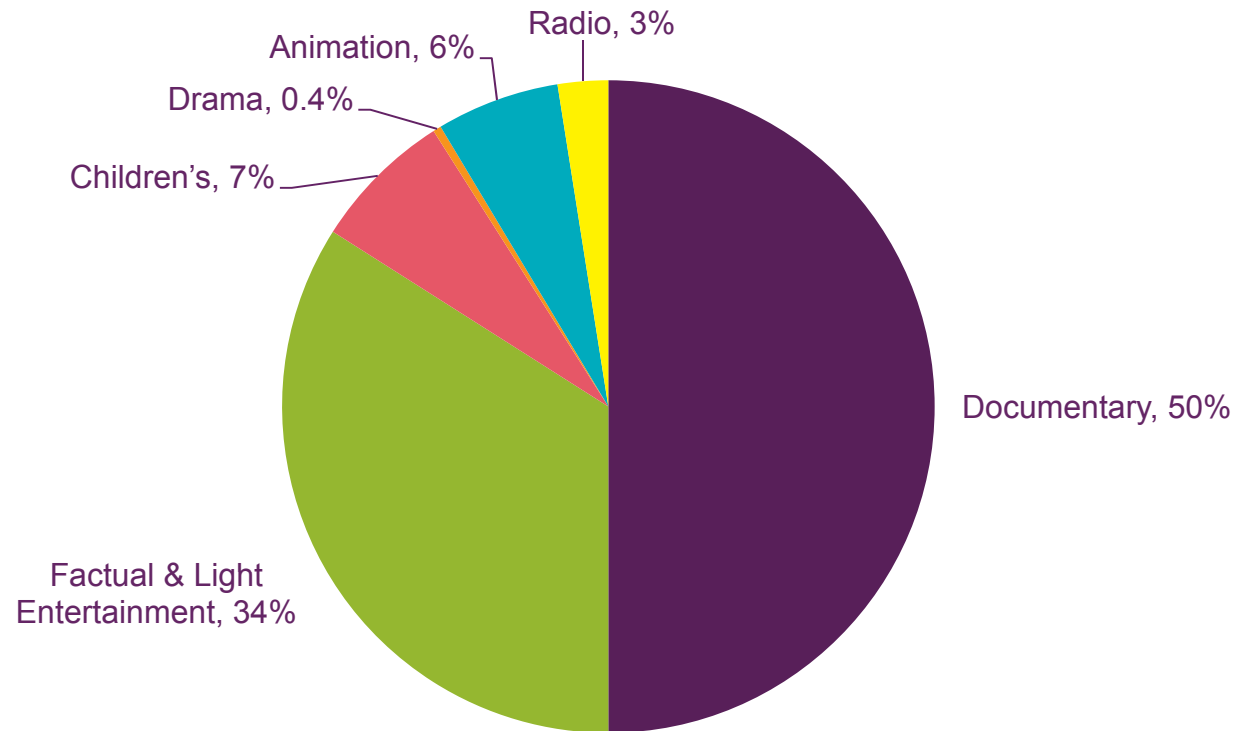


Source: Broadcasters. All figures expressed in 2012 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC Alba or BBC spend on S4C output.

Spend by the ILBF on Irish language programming, 2012/13

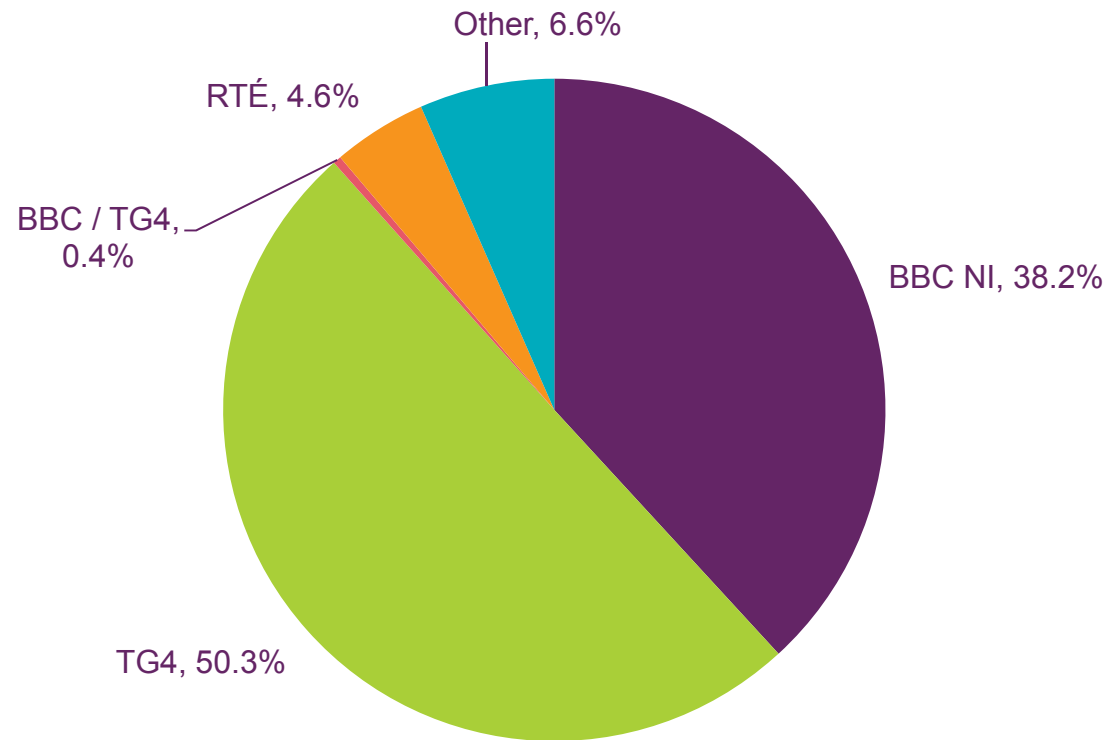
Proportion of spend for 2012/13



Source: ILBF. Includes all programmes

Spend by the ILBF on Irish language programming, 2012/13

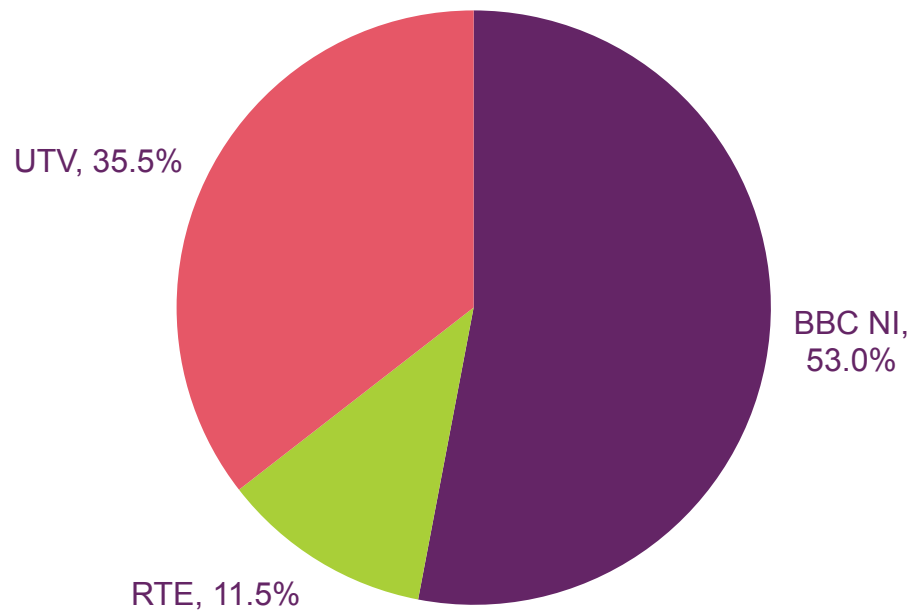
% breakdown of output by broadcaster 2012/2013



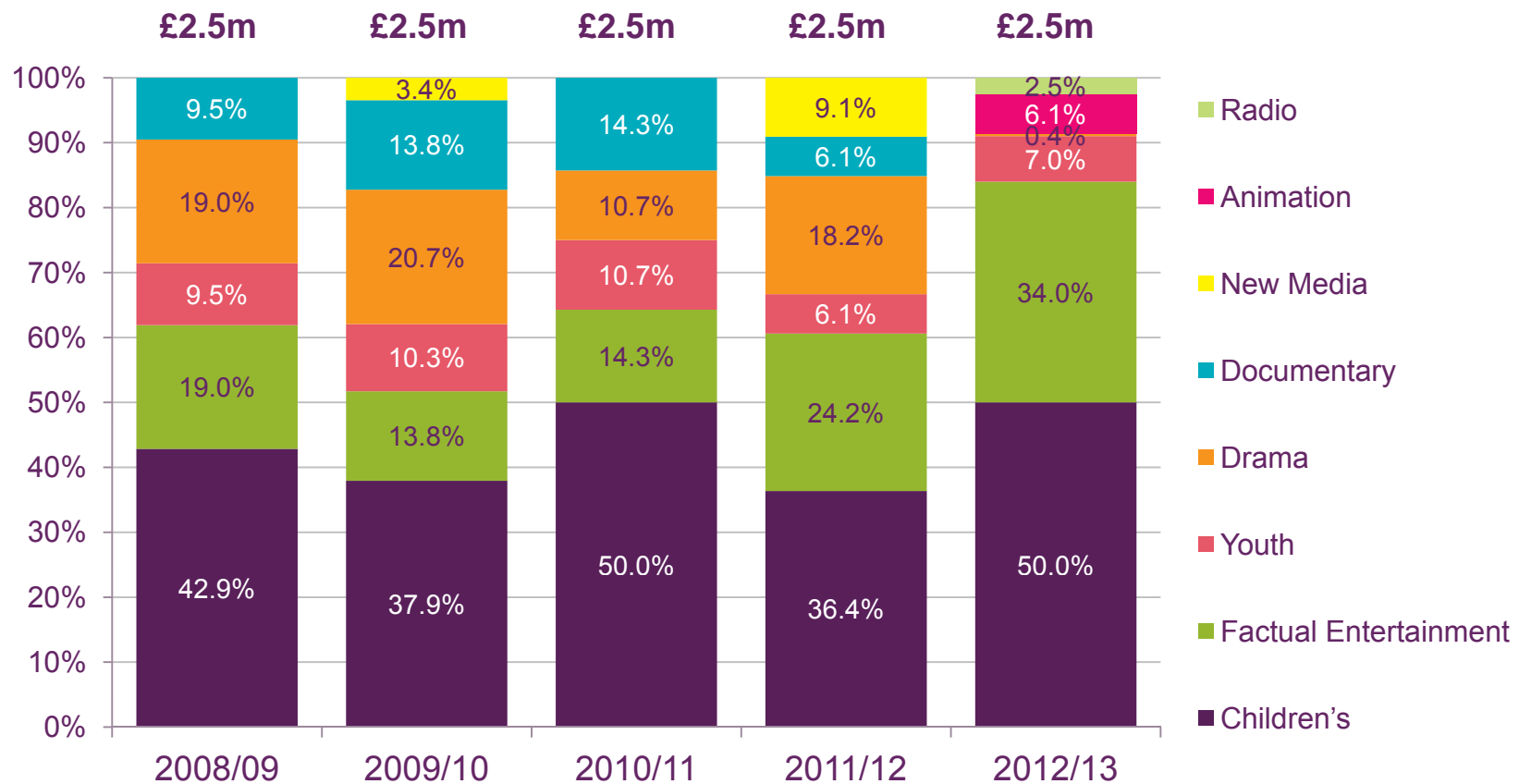
Source: ILBF. Includes all programmes

Spend by the ILBF on Irish language programming, 2012/13

% breakdown of output by broadcaster 2012/13



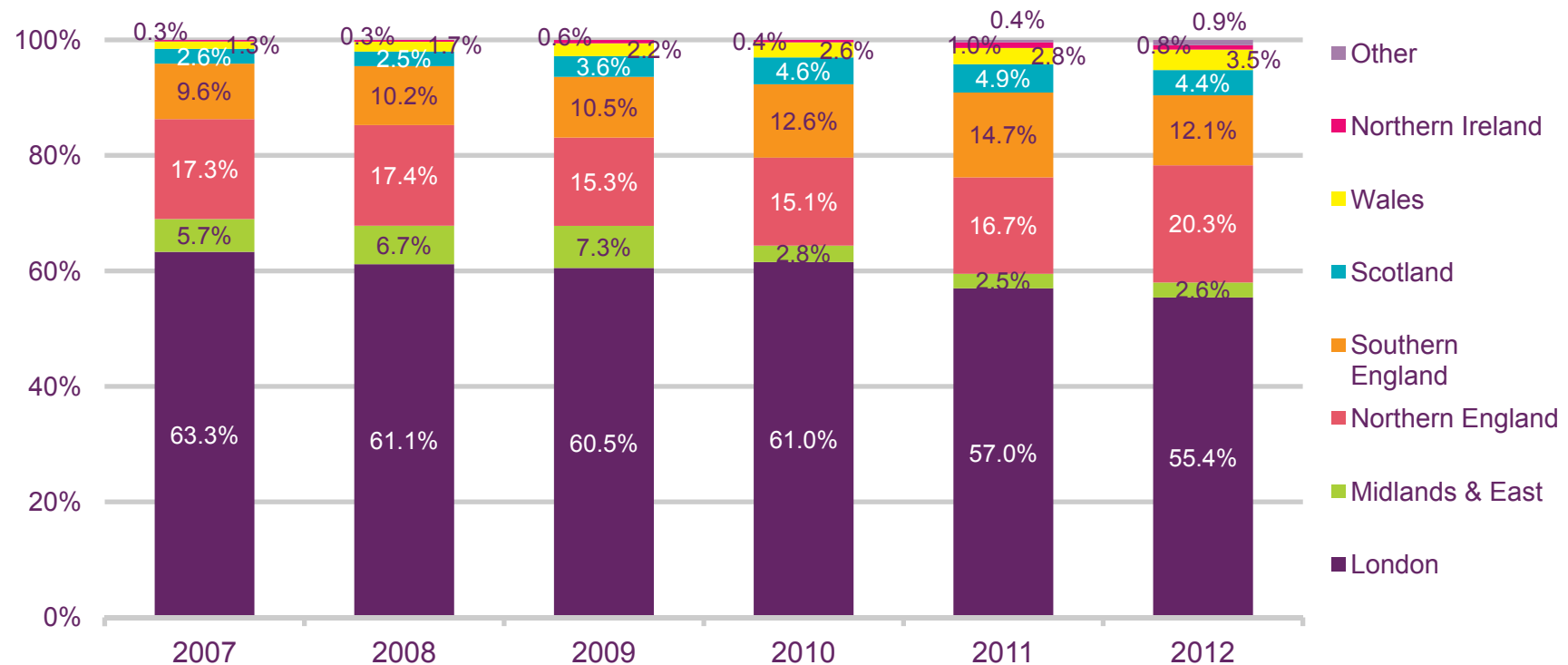
Spend by the ILBF on Irish language programming, 2008/09 - 2012/13



Source: ILBF. Includes all programmes

Expenditure on out-of-London production

Percentage of production by value

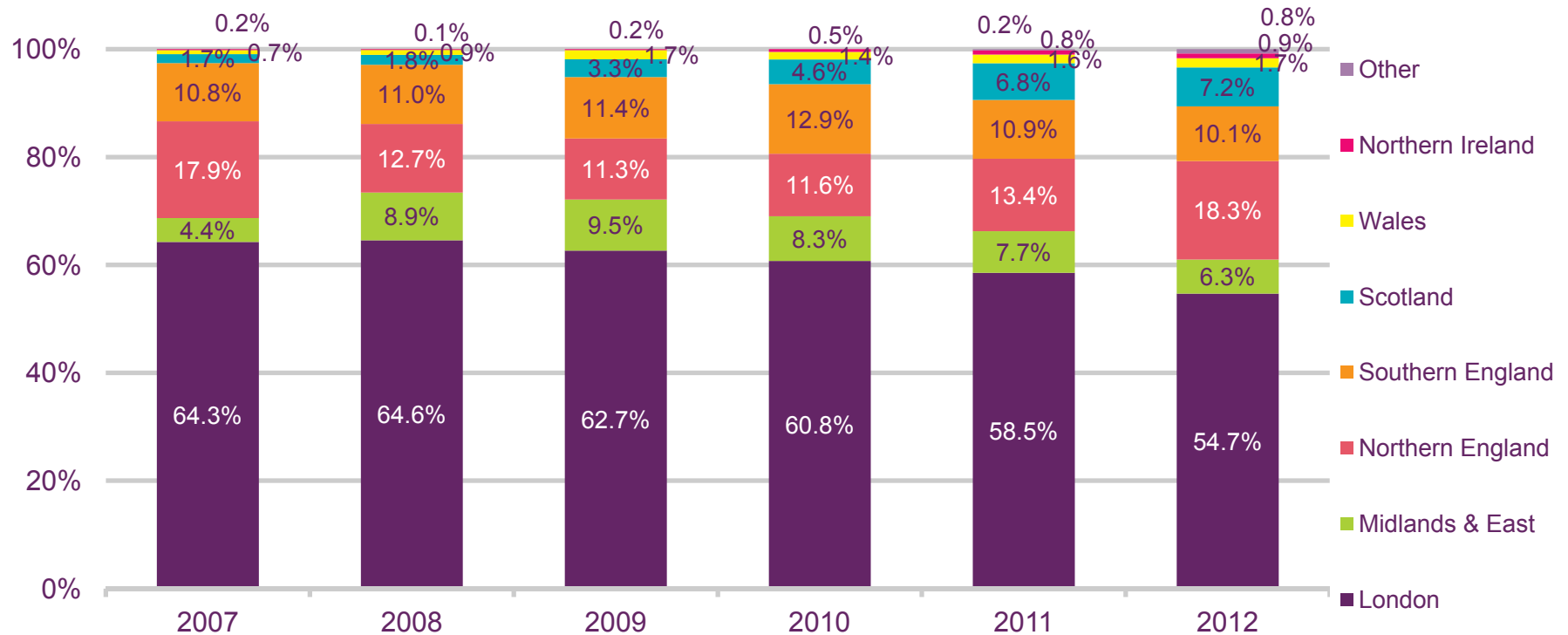


Source: Ofcom/broadcasters

Note: A new category 'Multi Nation/Region production' has been created for Regional Productions from London Producers which do not meet both 70% of spend and 50% of talent in any one particular Macro Region' See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

Volume of out-of-London production

Percentage of production by volume



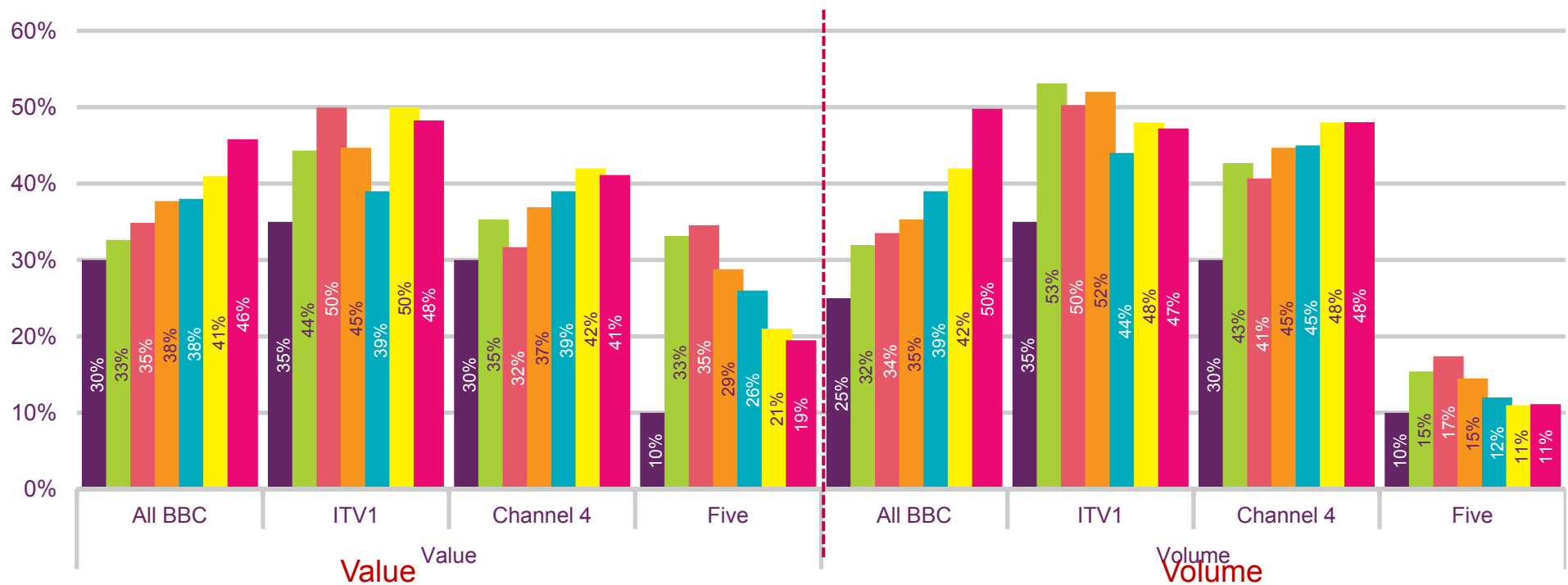
Source: Ofcom/broadcasters

Note: A new category 'Multi Nation/Region production' has been created for Regional Productions from London Producers which do not meet both 70% of spend and 50% of talent in any one particular Macro Region' See http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

Performance against the Out-of-London production quotas

■ Quota 2012 ■ Achieved 2007 ■ Achieved 2008 ■ Achieved 2009 ■ Achieved 2010 ■ Achieved 2011 ■ Achieved 2012

Percentage of network production produced outside London, by value and by volume



Source: Ofcom/broadcasters

Out-of-London productions by channel/macro-region: value

Distribution of spend on qualifying productions by macro region and channel (%)

	BBC					ITV1					Channel 4					Channel 5				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
London	65.1%	62.3%	62.2%	59.0%	54.2%	50.1%	55.3%	61.2%	50.5%	51.7%	68.3%	63.1%	60.6%	58.4%	58.9%	65.5%	71.2%	73.6%	79.4%	80.5%
Midlands & East	3.8%	3.8%	3.9%	3.7%	3.7%	13.4%	14.4%	1.4%	0.7%	0.3%	1.0%	2.3%	1.7%	1.9%	3.4%	17.4%	16.0%	7.2%	4.5%	4.0%
Northern England	8.9%	8.2%	7.7%	9.4%	17.3%	31.0%	25.5%	25.4%	26.2%	27.4%	18.4%	19.4%	19.7%	22.9%	20.6%	5.1%	1.8%	0.1%	0.0%	0.1%
Southern England	14.2%	14.0%	13.0%	11.1%	7.4%	4.0%	4.1%	11.4%	22.2%	20.3%	10.8%	12.4%	13.5%	11.8%	11.0%	8.7%	9.0%	12.1%	14.2%	10.1%
Scotland	3.7%	6.1%	7.4%	9.0%	7.6%	1.4%	0.6%	0.4%	0.4%	0.3%	1.4%	2.5%	4.1%	2.5%	3.2%	2.9%	1.9%	6.2%	1.8%	3.6%
Wales	3.5%	4.4%	5.0%	5.3%	6.8%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.2%	0.2%	1.4%	1.9%	0.5%	0.1%	0.8%	0.0%	0.0%
Northern Ireland	0.6%	1.2%	0.8%	2.1%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	1.6%
Other	0.0%	0.0%	0.0%	0.5%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Regional	34.9%	37.7%	37.8%	41.0%	45.8%	49.9%	44.7%	38.7%	49.5%	48.3%	31.7%	36.9%	39.4%	41.6%	41.1%	34.5%	28.8%	26.4%	20.6%	19.5%

Source: Broadcaster returns

Out-of-London productions by channel/macro-region: volume

Distribution of hours of qualifying productions by macro region and channel (%)

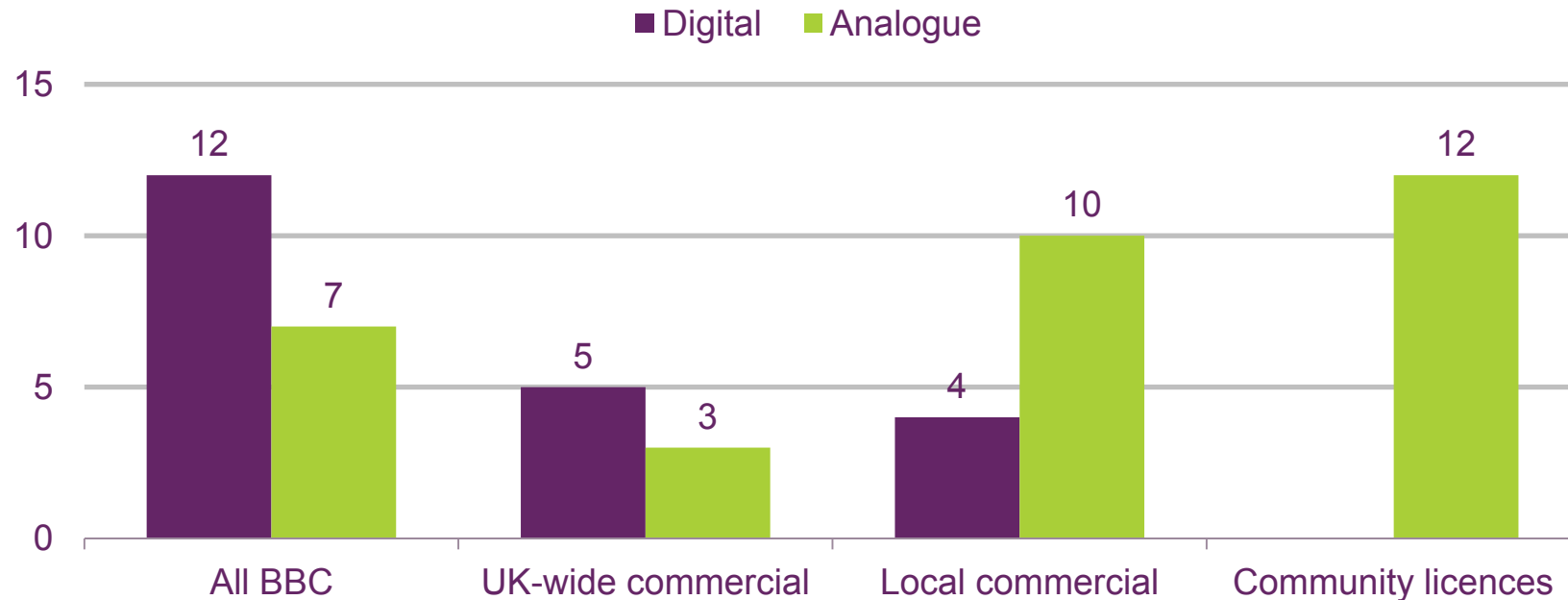
	BBC					ITV1					Channel 4					Channel 5				
	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012	2008	2009	2010	2011	2012
London	66.5%	64.7%	61.4%	57.5%	50.2%	49.7%	48.0%	55.6%	52.0%	52.8%	59.3%	55.3%	54.7%	51.6%	52.0%	82.6%	85.5%	88.2%	89.1%	88.9%
Midlands & East	5.6%	5.5%	5.7%	5.4%	3.9%	21.0%	25.5%	19.8%	18.7%	16.0%	1.2%	1.9%	2.3%	1.9%	2.6%	8.7%	6.5%	5.1%	3.7%	2.5%
Northern England	5.7%	5.1%	5.0%	7.0%	18.5%	24.3%	20.5%	19.3%	22.0%	21.0%	22.2%	23.7%	23.3%	24.8%	22.4%	4.9%	1.5%	0.1%	0.1%	0.1%
Southern England	17.0%	15.7%	17.6%	11.9%	8.4%	4.3%	5.7%	5.0%	7.0%	10.1%	14.6%	15.3%	14.0%	15.9%	15.7%	3.1%	3.3%	4.4%	6.3%	6.1%
Scotland	3.4%	6.5%	7.5%	13.6%	13.4%	0.3%	0.2%	0.2%	0.3%	0.1%	1.4%	2.0%	3.7%	2.5%	4.1%	0.6%	0.4%	1.8%	0.9%	1.8%
Wales	1.5%	2.2%	2.0%	2.7%	2.6%	0.2%	0.2%	0.1%	0.0%	0.0%	1.3%	1.6%	1.6%	2.0%	2.2%	0.2%	2.8%	0.5%	0.0%	0.1%
Northern Ireland	0.3%	0.4%	0.8%	1.5%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%	0.6%
Other	0.0%	0.0%	0.0%	0.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Regional	33.5%	35.4%	38.6%	42.4%	49.8%	50.1%	52.1%	44.4%	48.0%	47.2%	40.7%	44.5%	45.3%	48.4%	48.0%	17.5%	14.5%	11.9%	10.9%	11.1%

Source: Broadcaster returns

Radio and audio

Radio station availability in Northern Ireland

Radio station availability: Northern Ireland








Source: Ofcom, April 2013

Note: This chart shows the maximum number of UK radio services available in Northern Ireland; local variations along with reception constraints mean that listeners may not be able to access all of these

Weekly reach and listening hours

Average weekly reach and listening hours: 2012

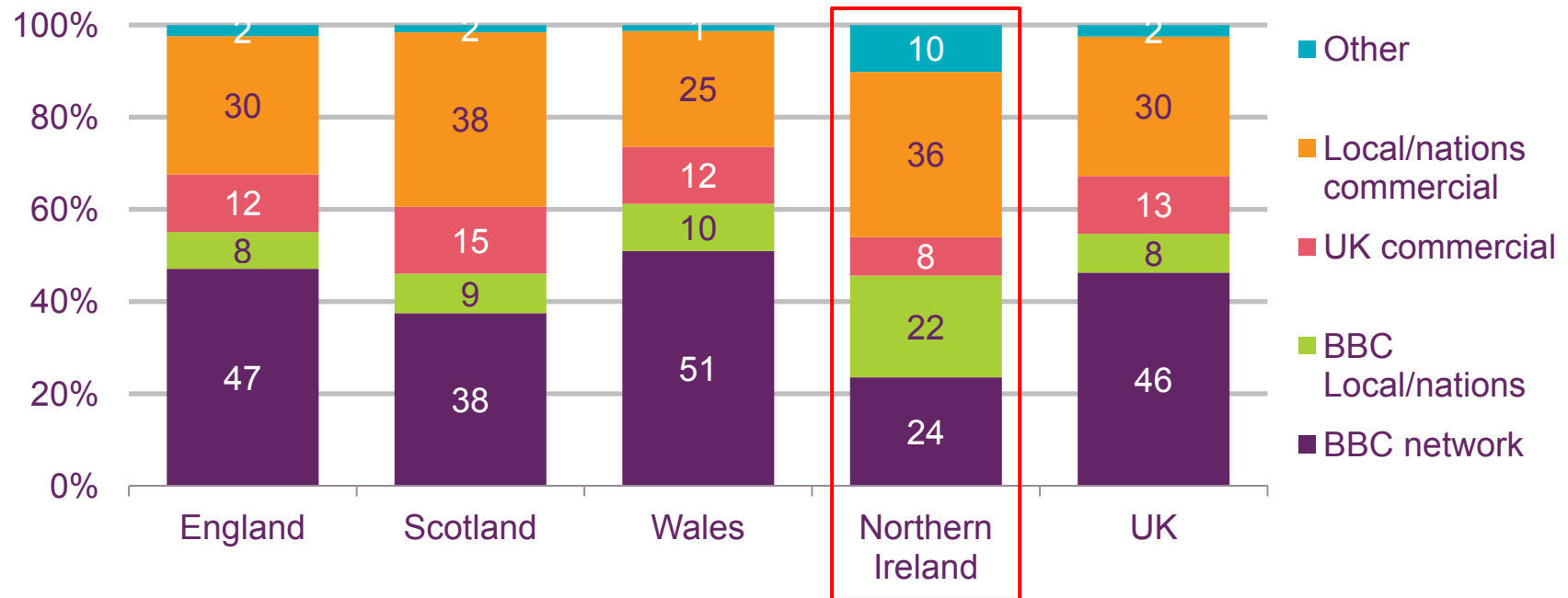
	England	Scotland	Wales	Northern Ireland	UK TOTAL
					
Average weekly listening	22.2 hours	21.6 hours	23.1 hours	21.4 hours	22.2 hours
Reach	89.6%	86.7%	93.1%	87.1%	89.5%

Source: RAJAR, All adults (15+), year ended Q4 2012. Reach is defined as a percentage of the area adult population who listen to a station for at least 5 minutes in the course of an average week.

Share of listening hours, by nation: 2012

Share of listening hours, by nation: 2012

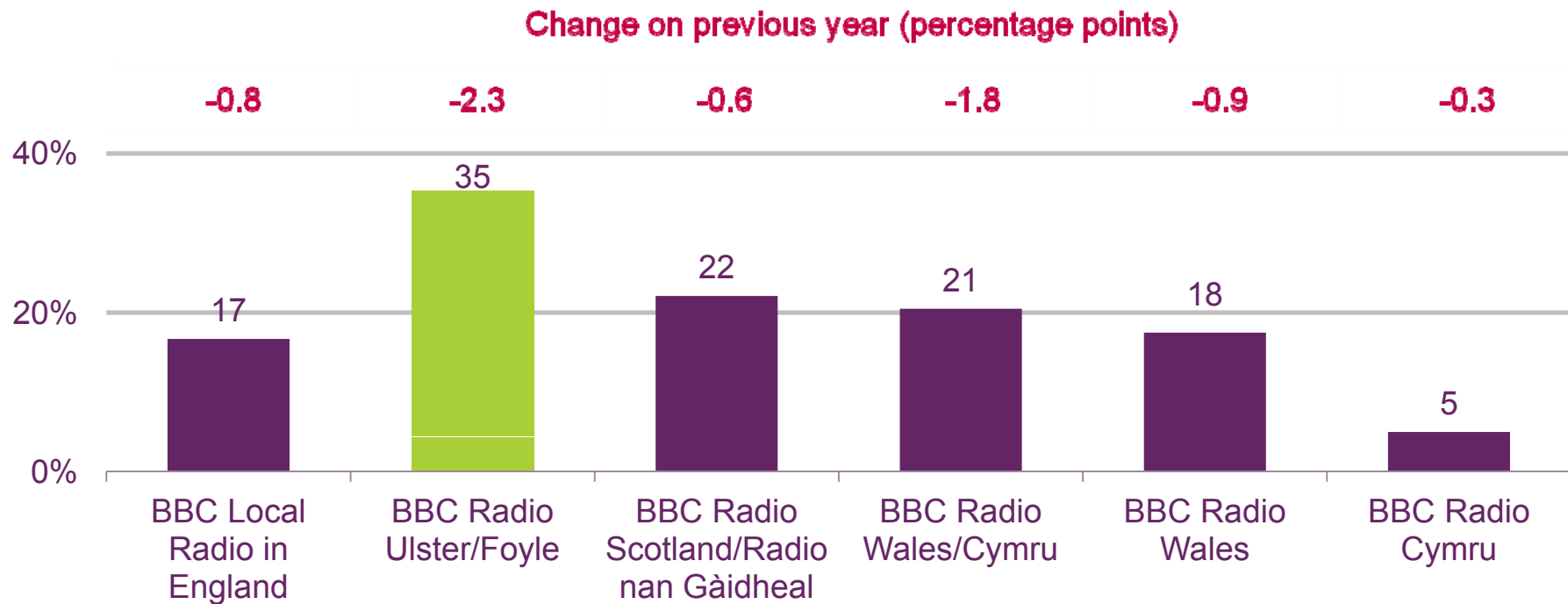
Share of listening hours



Source: RAJAR, All adults (15+), year ended Q4 2012

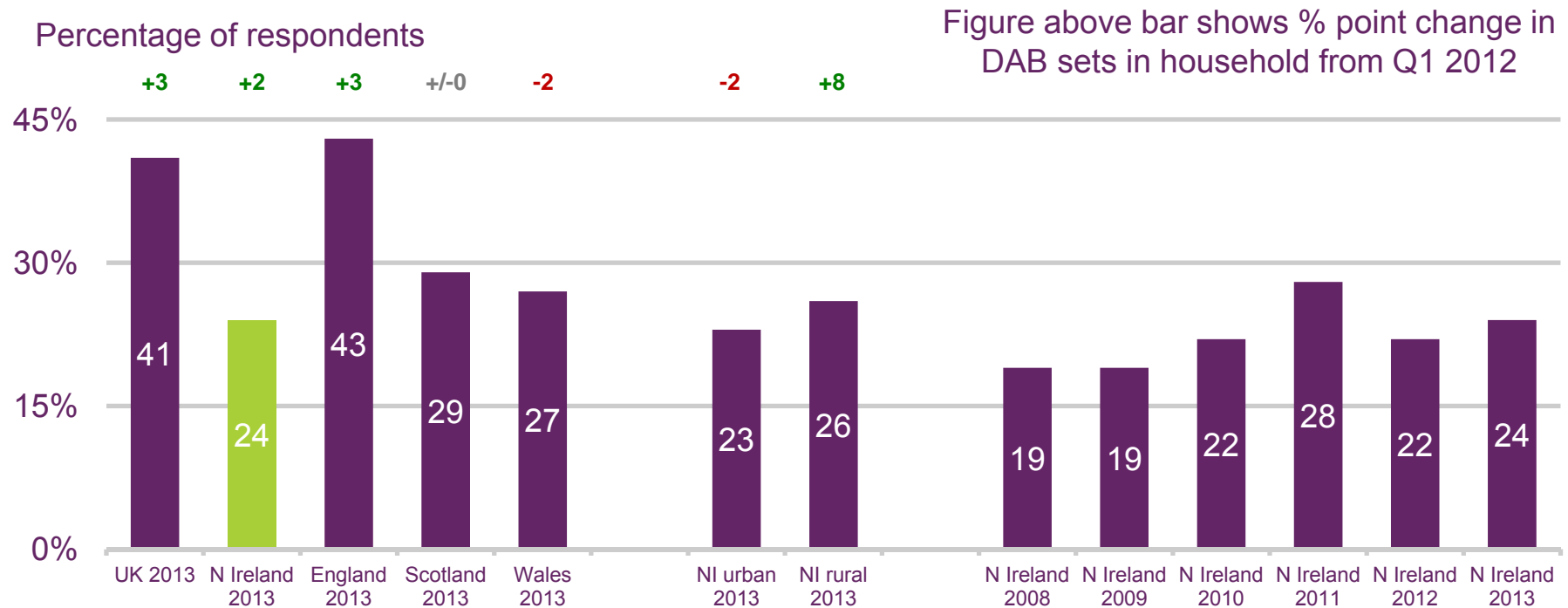
Weekly reach for BBC nations/local services

Weekly reach for nations/local BBC services



Source: RAJAR, All adults (15+), year ended Q4 2012

Ownership of DAB radios among radio listeners



Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who listen to radio (n = 2910 UK, 405 Northern Ireland, 1747 England, 375 Scotland, 383 Wales, 197 Northern Ireland urban, 208 Northern Ireland rural, 539 Northern Ireland 2008, 569 Northern Ireland 2009, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012, 405 Northern Ireland 2013)

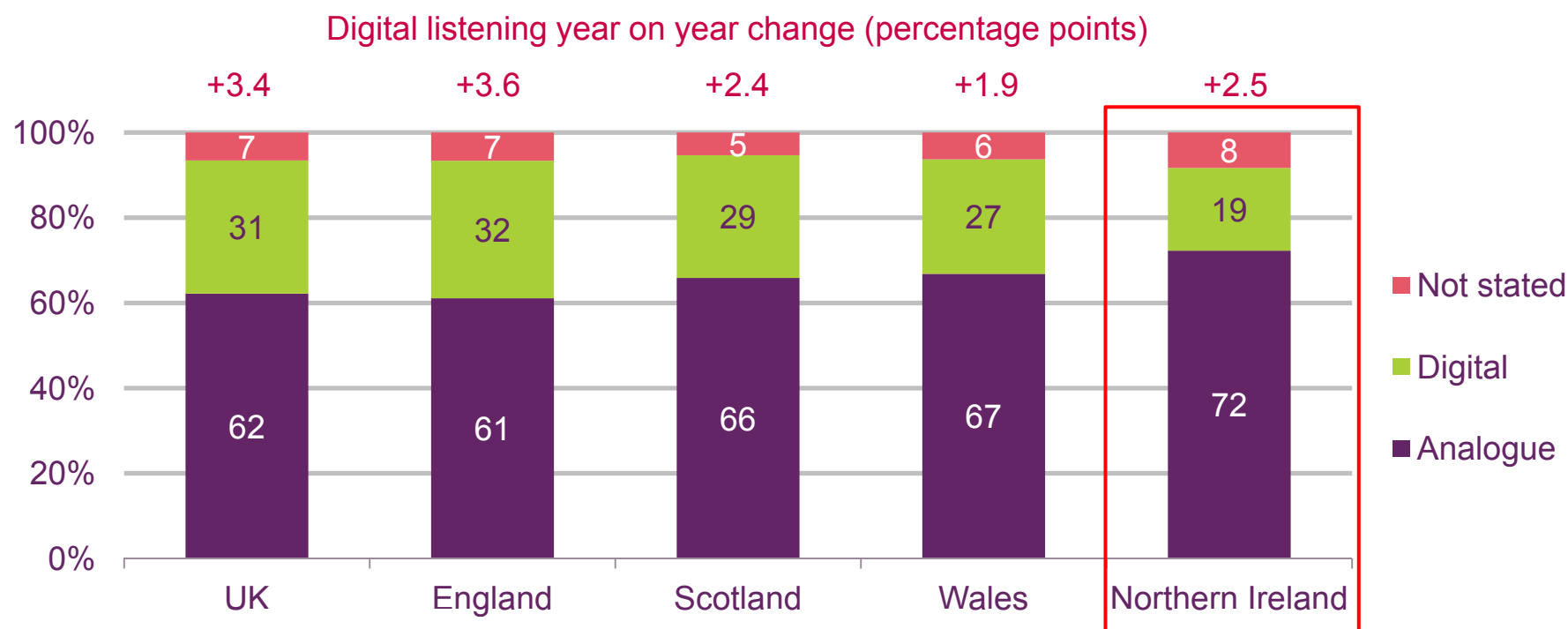
Note: Remaining percentages are Don't know responses.

NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

Share of listening hours via digital and analogue platforms: 2012



Share of listening hours via digital and analogue platforms: 2012

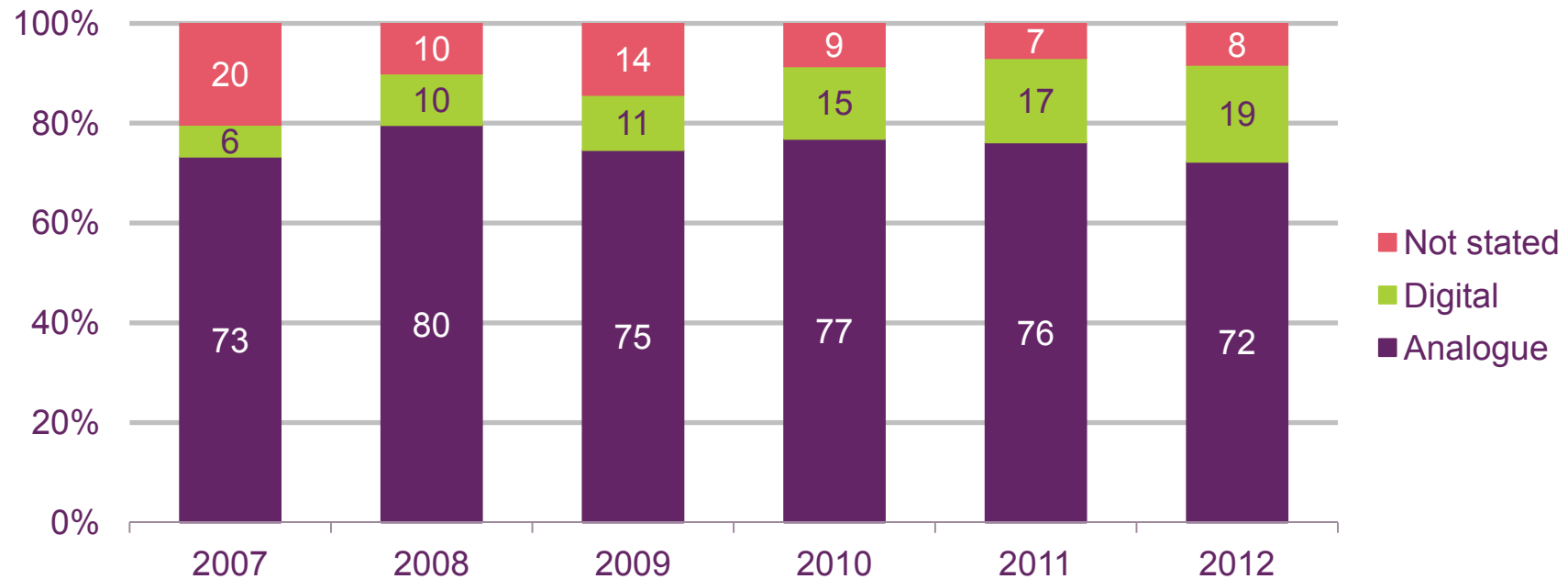


Source: RAJAR, All adults (15+), year ended Q4 2012

Share of hours via platform

Share of listening hours via digital and analogue platforms in Northern Ireland: 2007-2012

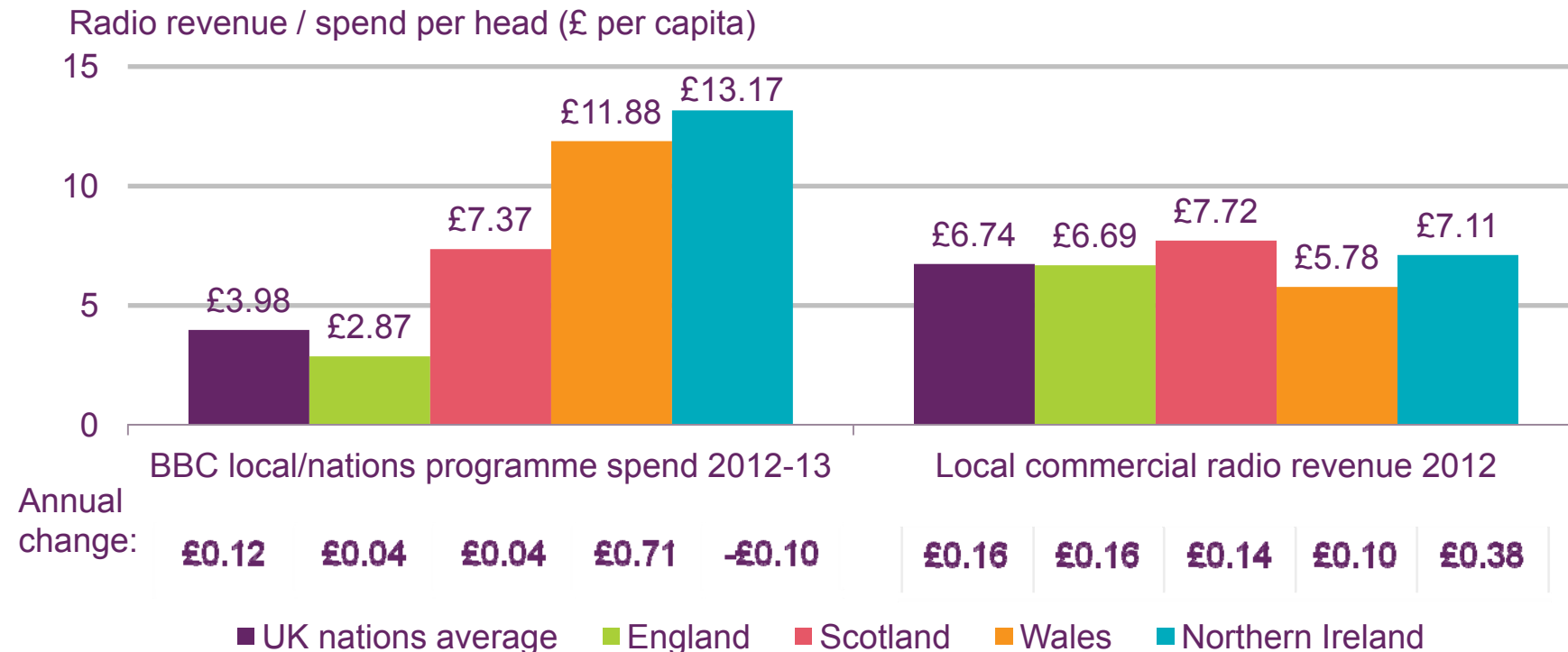
Share of total listening hours



Source: RAJAR, all adults, calendar years 2007-2012

Figure 3.8 Local/nations radio spend and revenue

Local/nations radio spend and revenue per head of population: 2012



Source: Broadcasters

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT and Absolute.

Likelihood of purchasing a DAB radio within the next year



QP12: How likely is it that your household will get a DAB radio in the next 12 months?

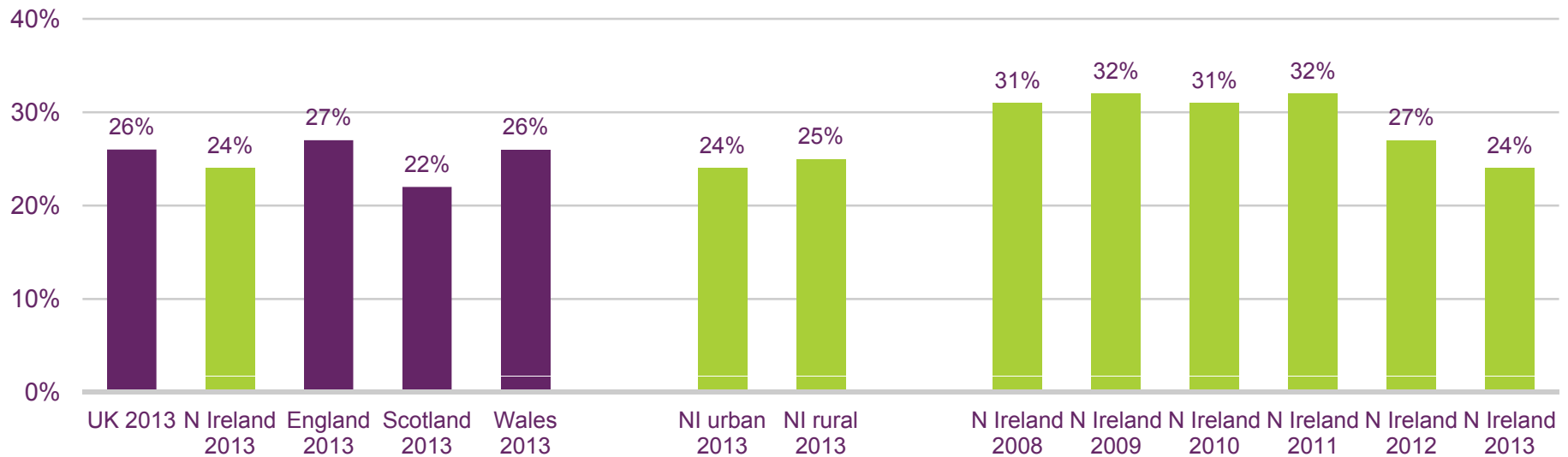
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1798 UK, 300 Northern Ireland, 972 England, 257 Scotland, 269 Wales, 153 Northern Ireland urban, 147 Northern Ireland rural, 449 Northern Ireland 2008, 443 Northern Ireland 2009, 500 Northern Ireland 2010, 238 Northern Ireland 2011, 305 Northern Ireland 2012, 300 Northern Ireland 2013).

NB. Data in 2011 based on those who listen to radio, do not have a DAB set and have any radio sets in the household that someone listens to in most weeks. *Caution: Low base

Use of either an MP3 player or an iPod

Use of either an MP3 player or an iPod (% adults)



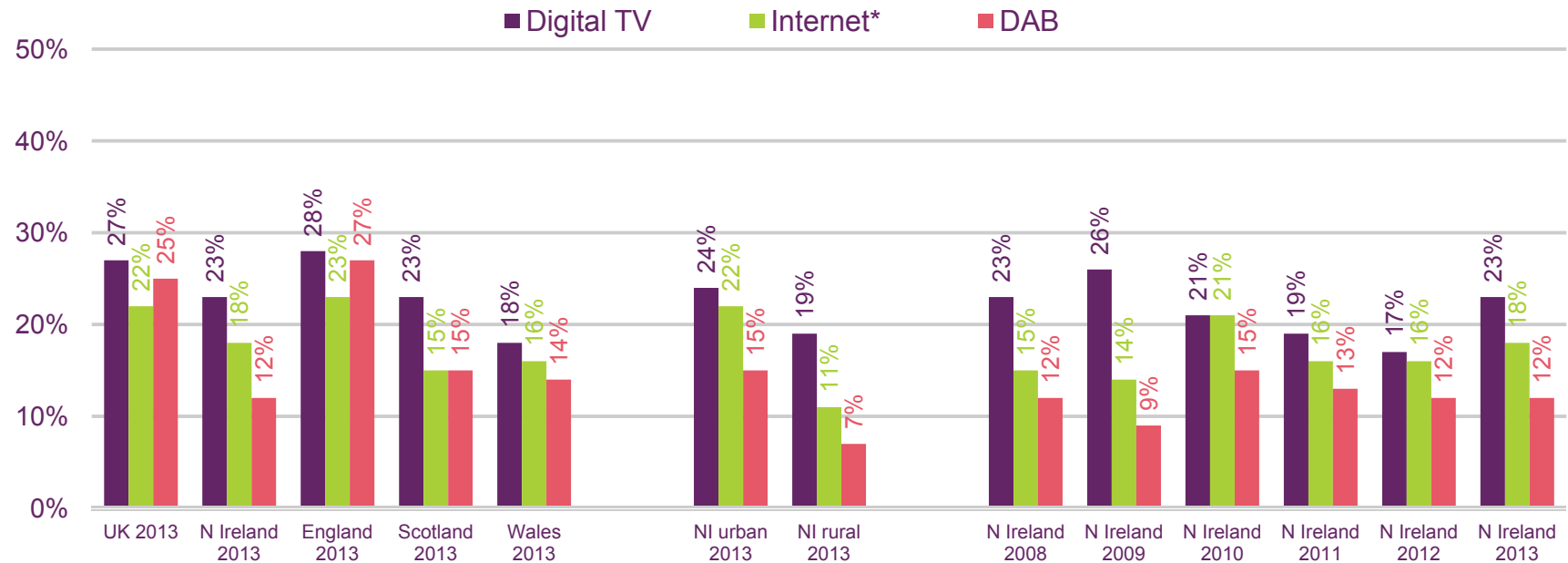
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Listening to radio via internet, DTV and DAB

Proportion of respondents (%) who have listened to radio via DTV, or internet



QP11. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio?/ QE5A. Which, if any, of these do you use the internet for? *Measure for Internet combines responses across radio listeners (at QP11) and internet users (at QE5A).

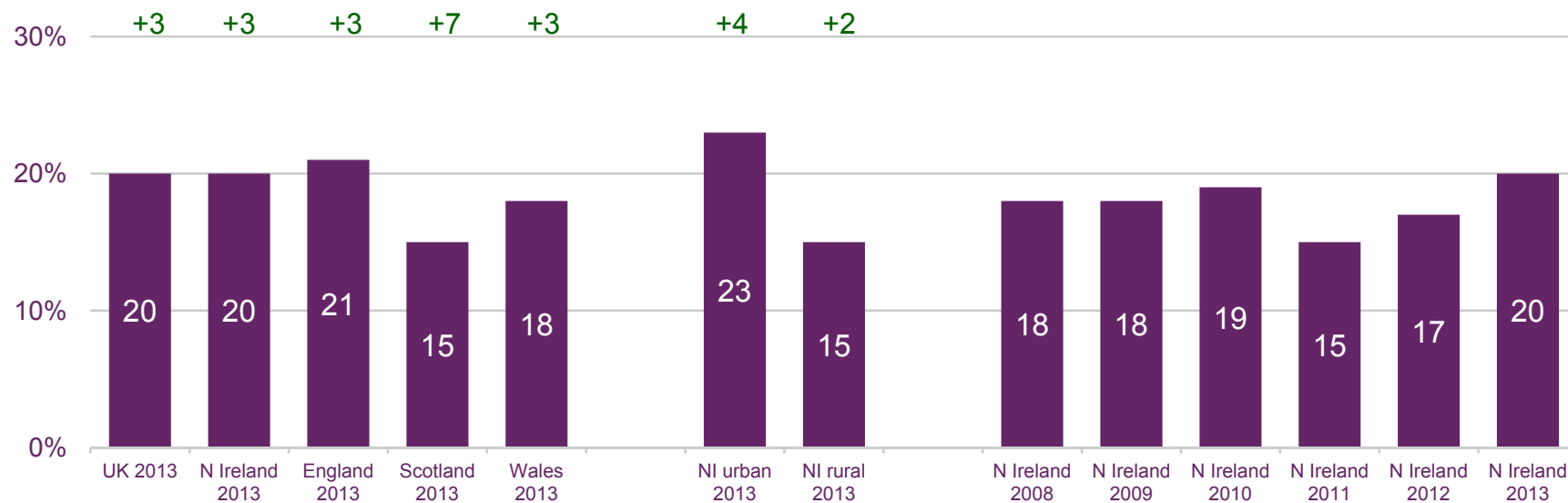
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Listening to radio on mobile phone

Proportion of respondents (%) who have used their mobile to listen to the radio

Figure above bar shows % point change in listening to radio from Q1 2012



QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?/ QP11. How often, if at all, do you access the radio via mobile phone?

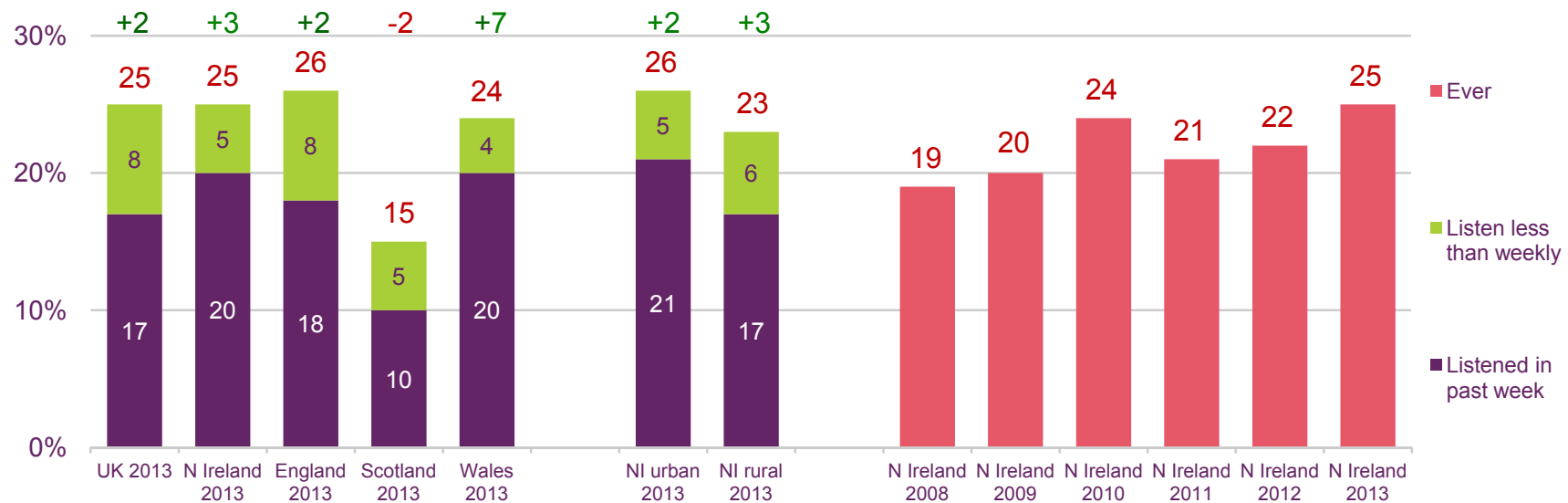
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Listening to audio content on mobile phone

Proportion of respondents (%) who have used their mobile to listen to audio content

Figure above bar shows % point change in listening to audio content from Q1 2012

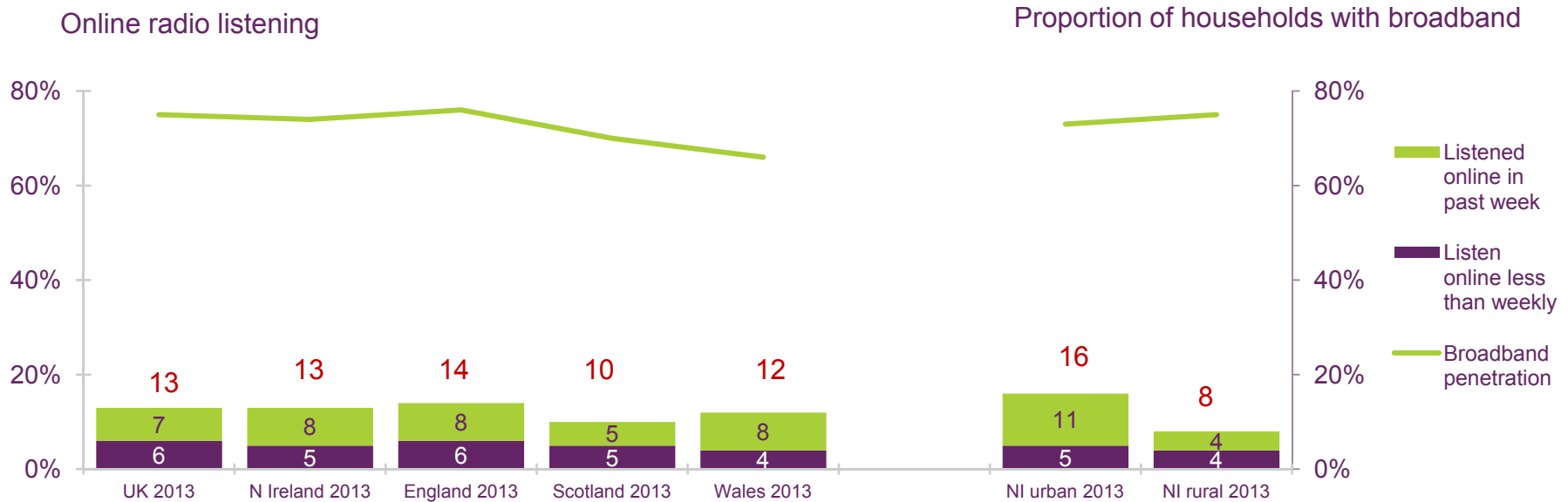


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Proportion of adults who listen to internet radio

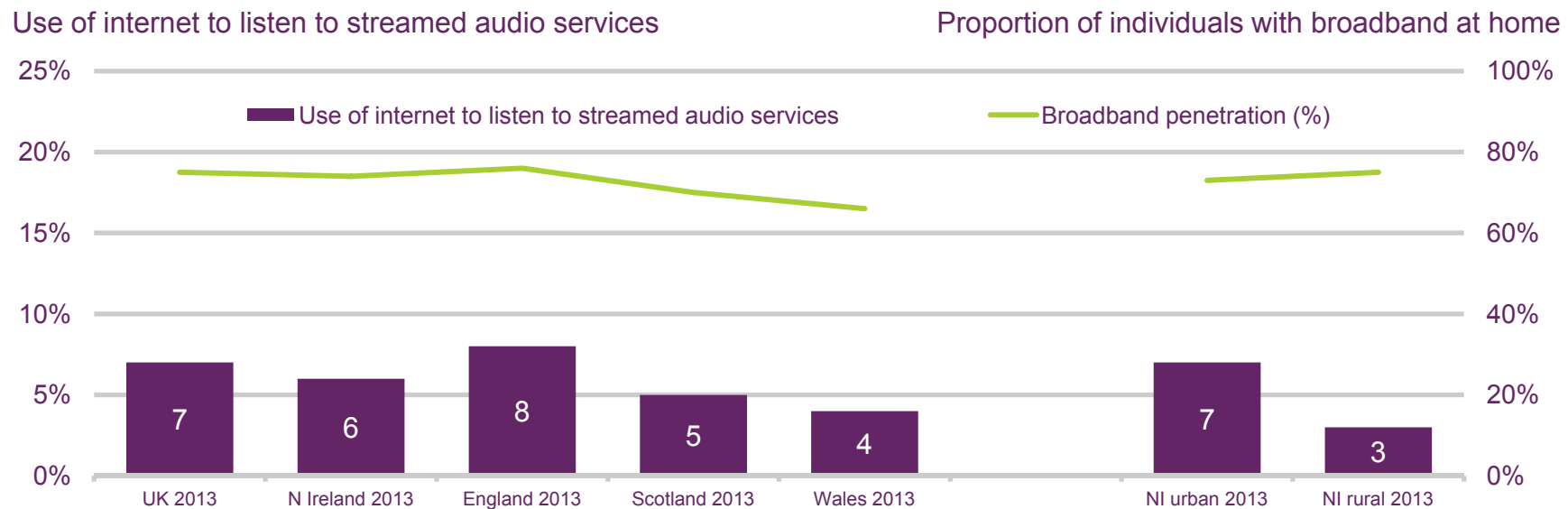


QE5A-B. Which, if any, of these do you use the internet for?/ And, which, if any, of these activities have you used the internet for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use) *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Use of internet for listening to streamed audio services



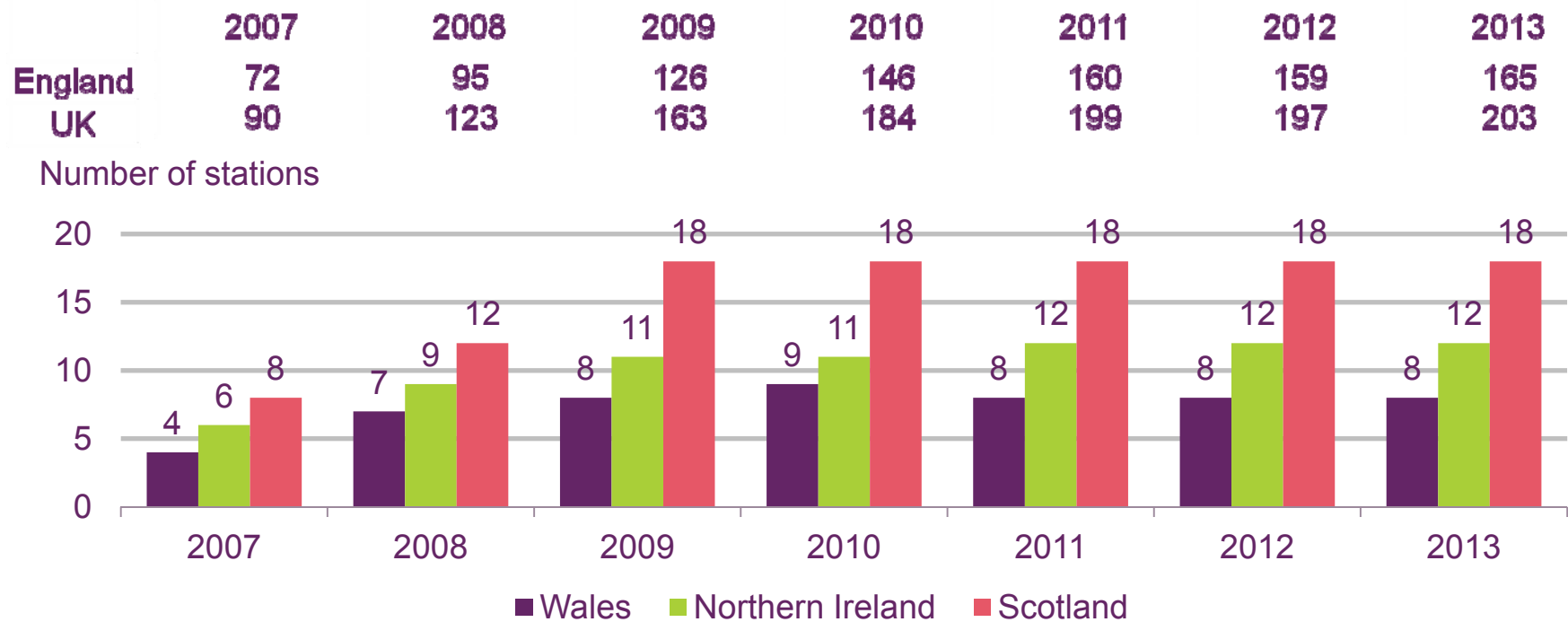
QE5A. Which, if any, of these do you use the internet for? (NB Not asked in 2008 or 2009) *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Ownership of DAB digital radios

Number of community radio stations on air: 2007-2013

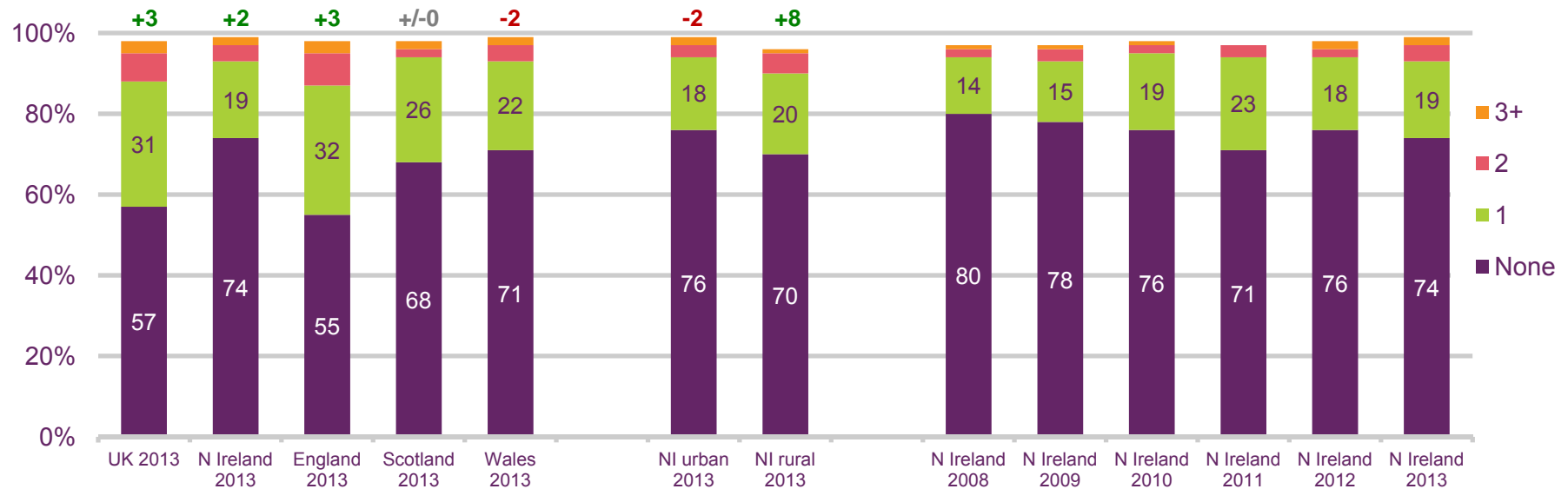


Source: Ofcom, 2013

Ownership of DAB digital radios

Percentage of respondents

Figure above bar shows % point change in DAB sets in household from Q1 2012



Own DAB	41%	24%	43%	29%	27%	23%	26%	19%	19%	22%	28%	22%	24%
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Q4. How many DAB sets do you have in your household?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who listen to radio (n = 2910 UK, 405 Northern Ireland, 1747 England, 375 Scotland, 383 Wales, 197 Northern Ireland urban, 208 Northern Ireland rural, 539 Northern Ireland 2008, 569 Northern Ireland 2009, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012, 405 Northern Ireland 2013)

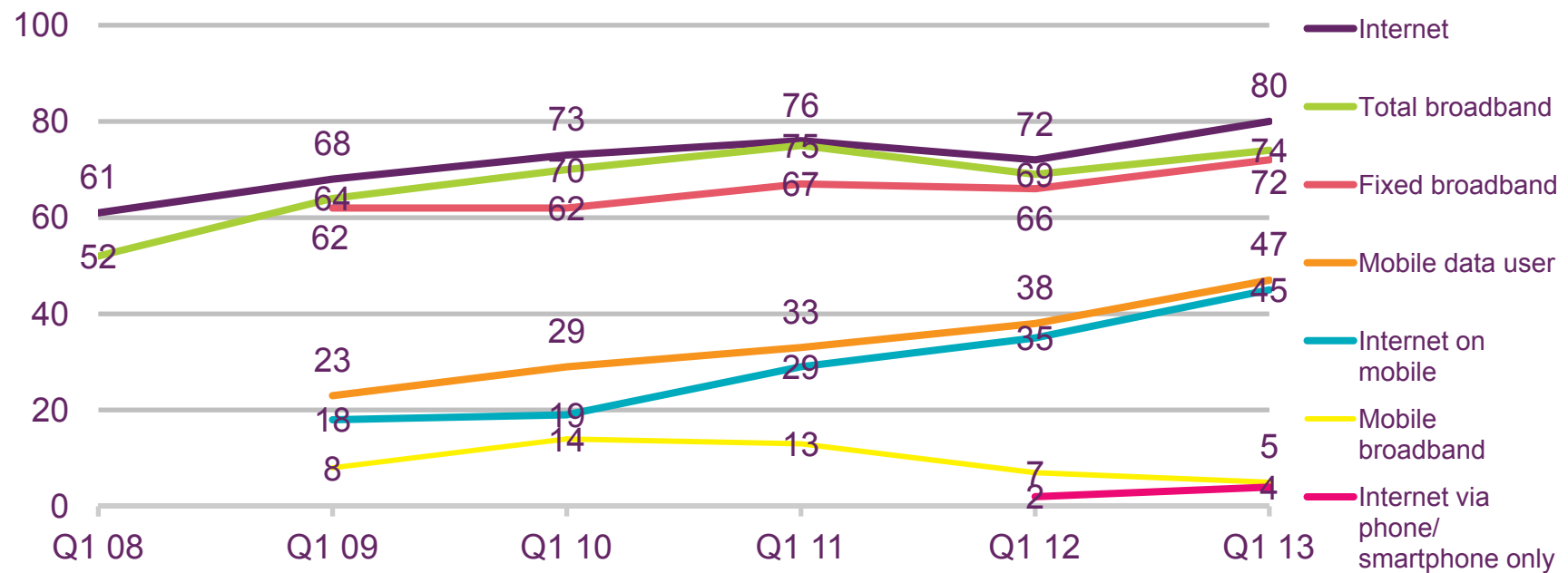
Note: Remaining percentages are Don't know responses.

NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

Internet and web-based content

Internet take-up, Northern Ireland: 2008-2013

Households (%)

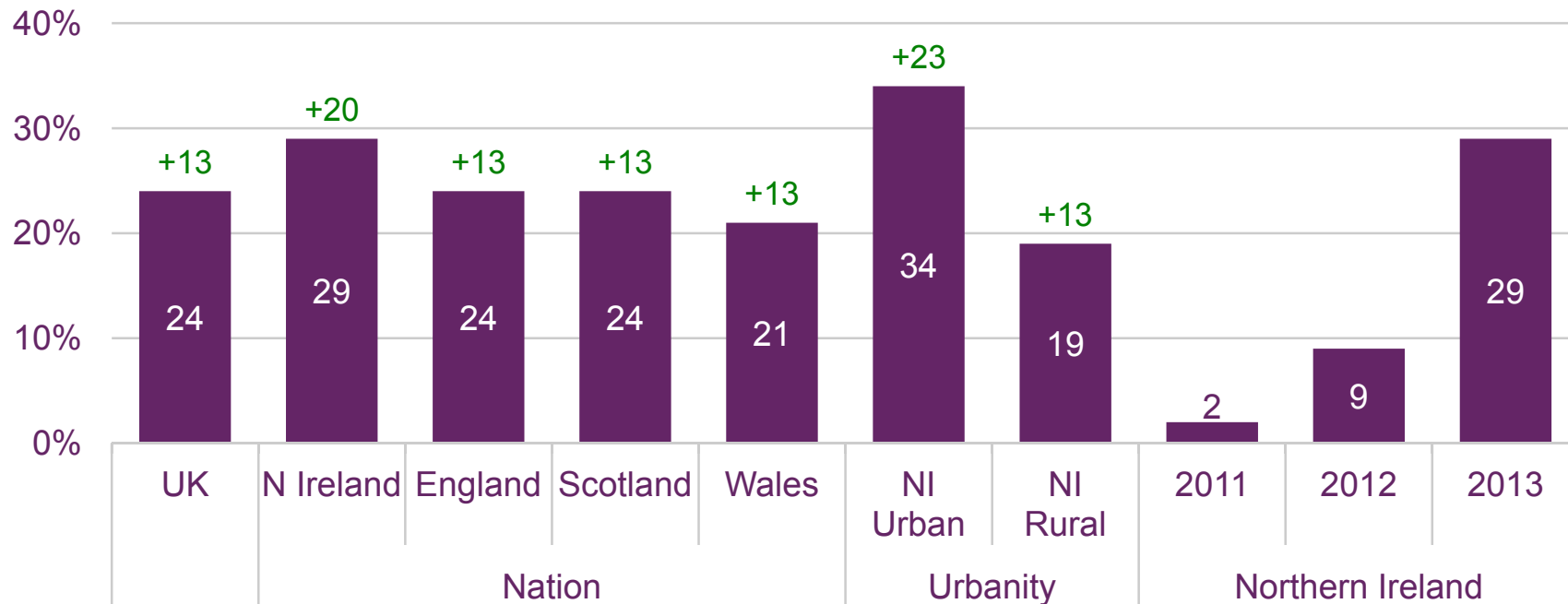


Source: Ofcom technology tracker

Base: All adults aged 16+ (n = 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Take-up of tablet computers in Northern Ireland

Households (%) / percentage point change in take-up of tablet computers from Q1 2012



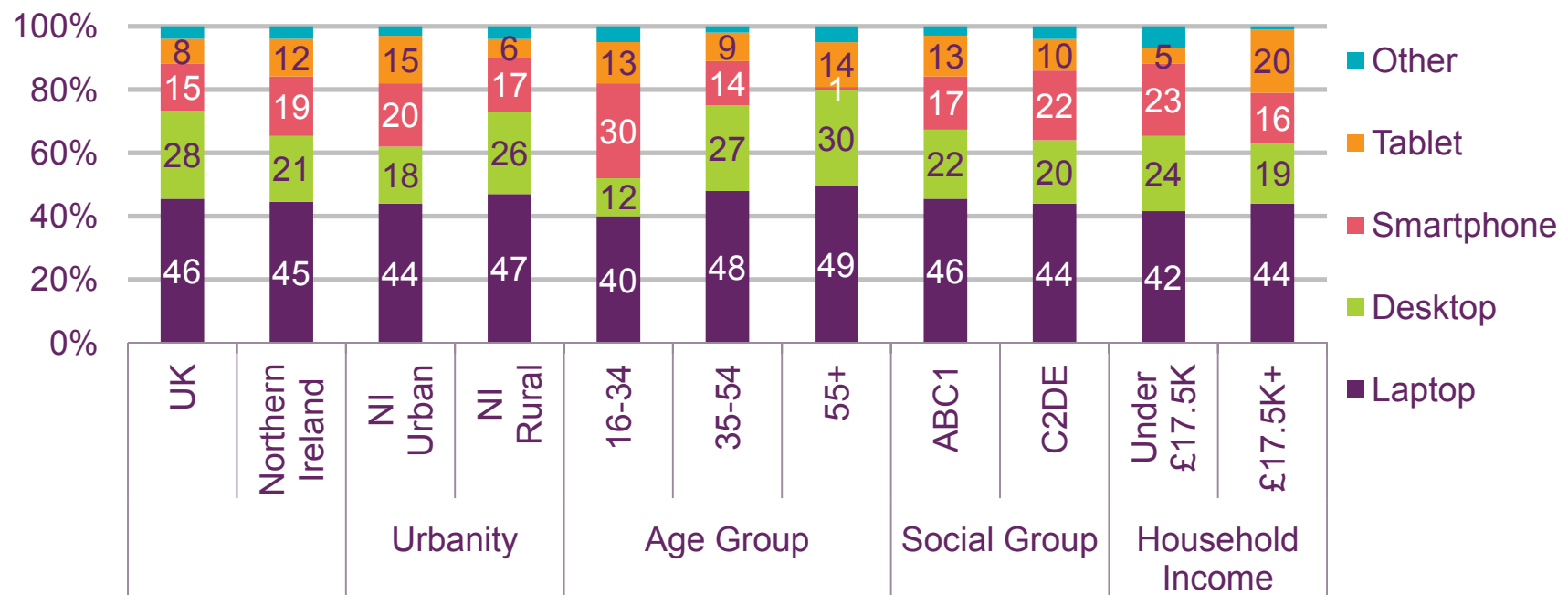
QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013)

Most important device for accessing the internet in Northern Ireland

Individuals (%)

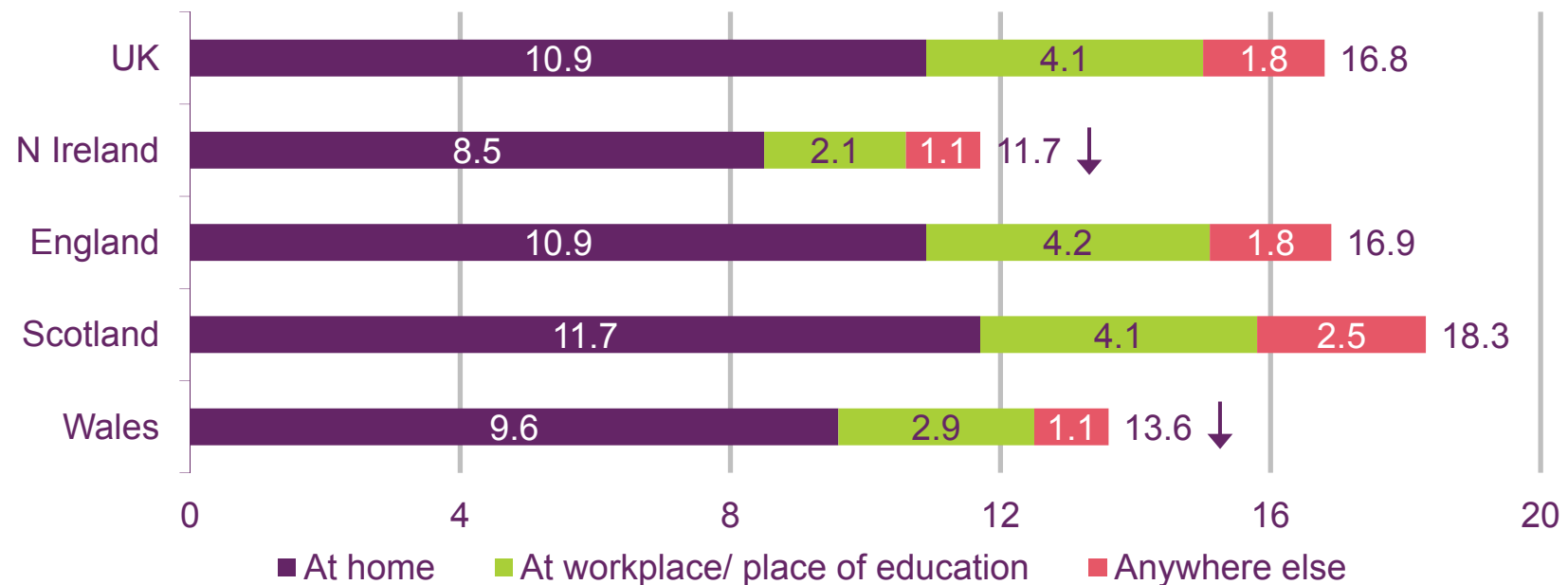


Source: Ofcom research, Q1 2013

Base: Internet users aged 16+ (n = 2918 UK., 376 Northern Ireland, 185 NI urban, 191 NI rural, 152 16-34, 134 35-54, 90 55+, 205 ABC1, 171 C2DE, 99 under £17.5K, 124 £17.5K+). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "Netbook", "Games console", "Other device", "None" and "don't know".

Claimed time spent on the internet in a typical week

Hours per week



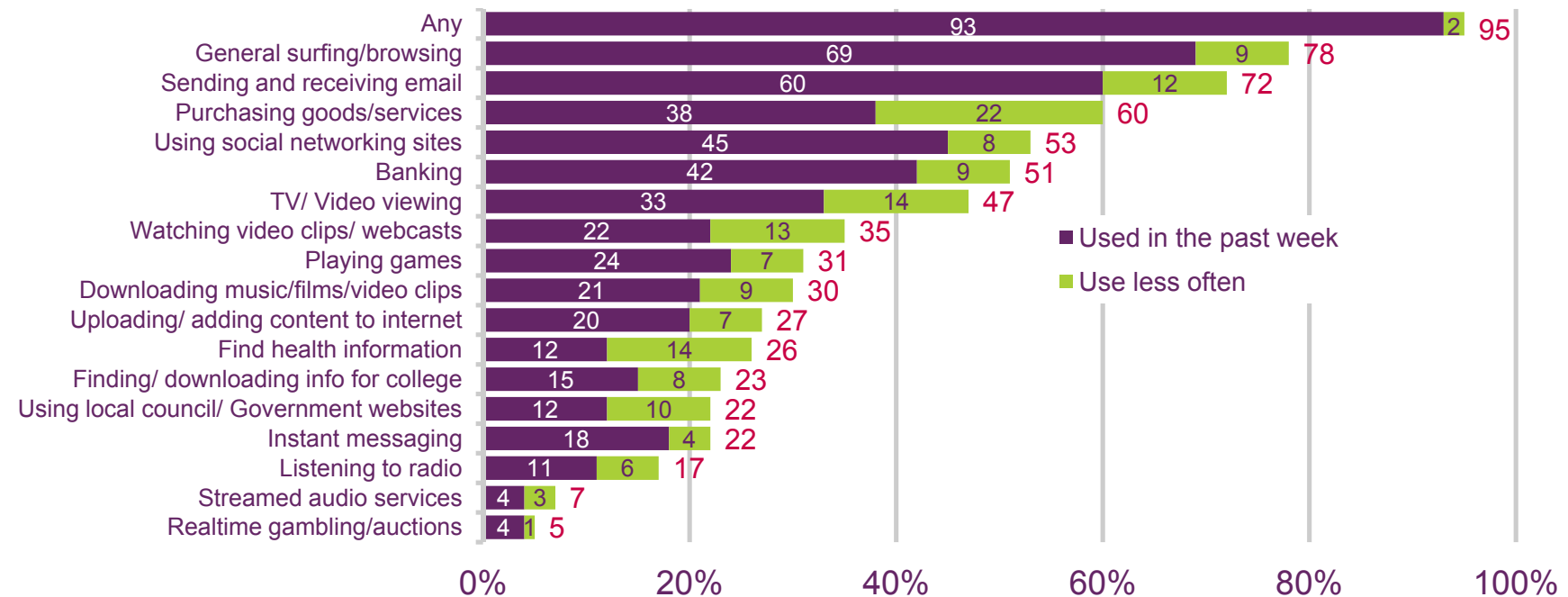
IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1381 UK, 857 England, 183 Scotland, 177 Wales, 164 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012

Activities conducted online by internet users.

Individuals (%)



QE5. Which, if any, of these do you use the internet for?

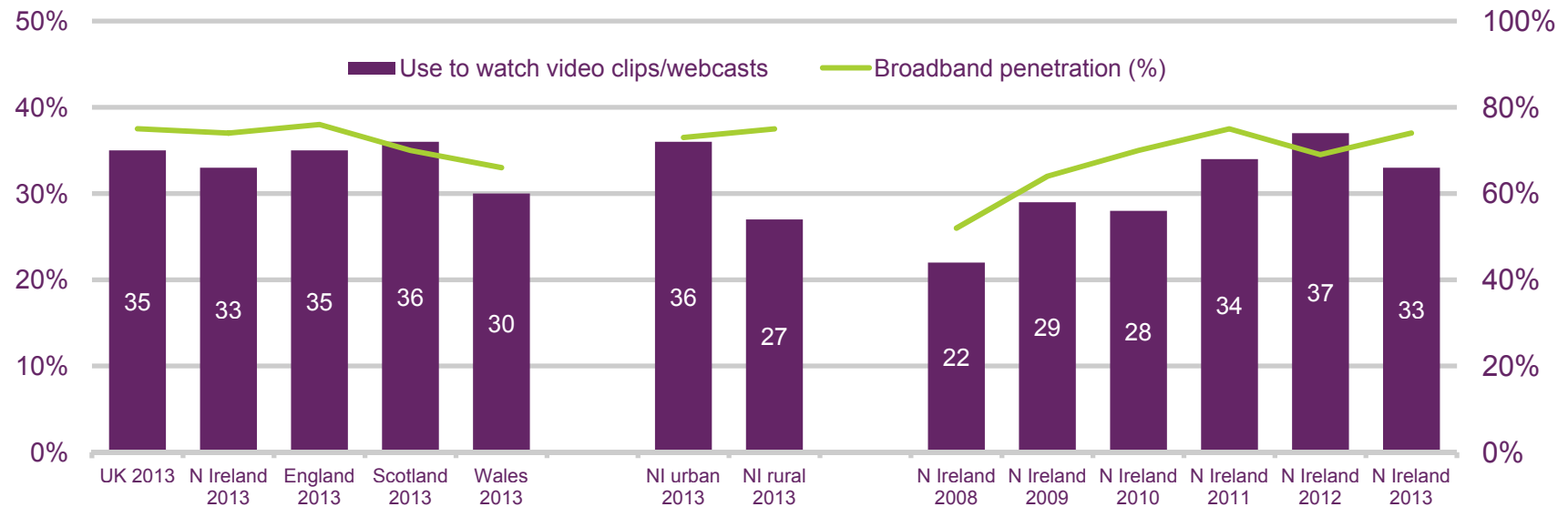
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 376 Northern Ireland 2013)

Use of internet for watching video clips/webcasts (e.g. YouTube)

Use of internet or mobile to watch video clips

Proportion of individuals with broadband at home



QE5A. Which, if any, of these do you use the internet for?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

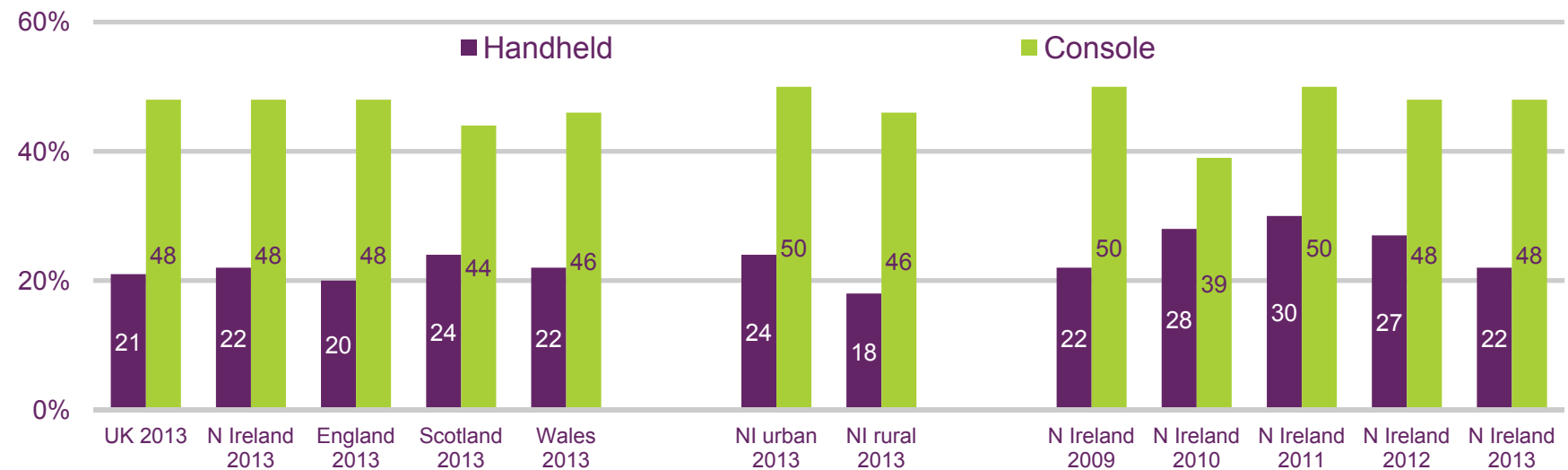
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales, 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Figure 4.x.2

Take up of leading games consoles in Northern Ireland

Take-up (%)



QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Household computer ownership inc. PCs, laptops, tablets and netbooks

Proportion of households (%) / Percentage point change in computer ownership from Q1 2012



QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Consumers' use of converging platforms, 2013



Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland)

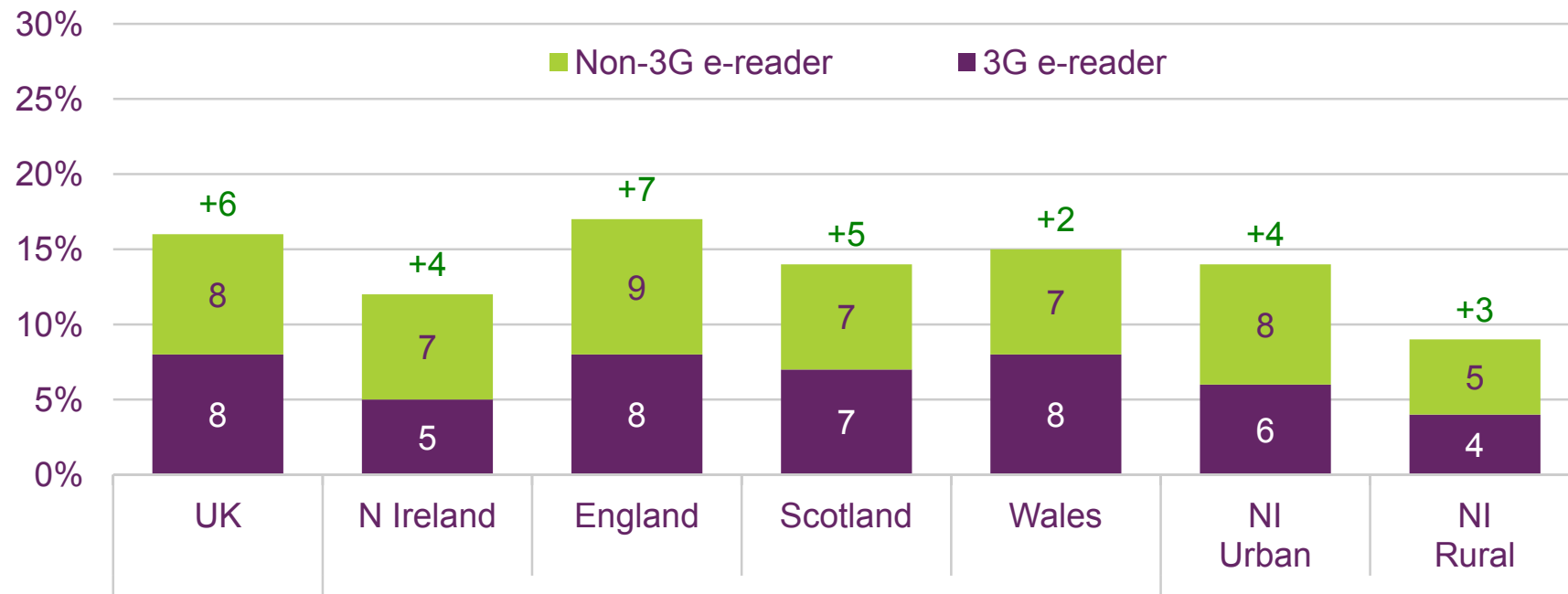
QE5A-B. Which, if any, of these do you use the internet for? *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

QP11. How often, if at all, do you access the radio via – Digital radio via Internet? *NB Measure for Radio over internet combines responses across radio listeners (at QP11) and internet users (at QE5A), data not comparable with previous years.

QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download apps, send/ receive emails, accessing the internet, 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/ social networking

Personal use of e-readers, 2013

Individuals (%) / Percentage point year on year change



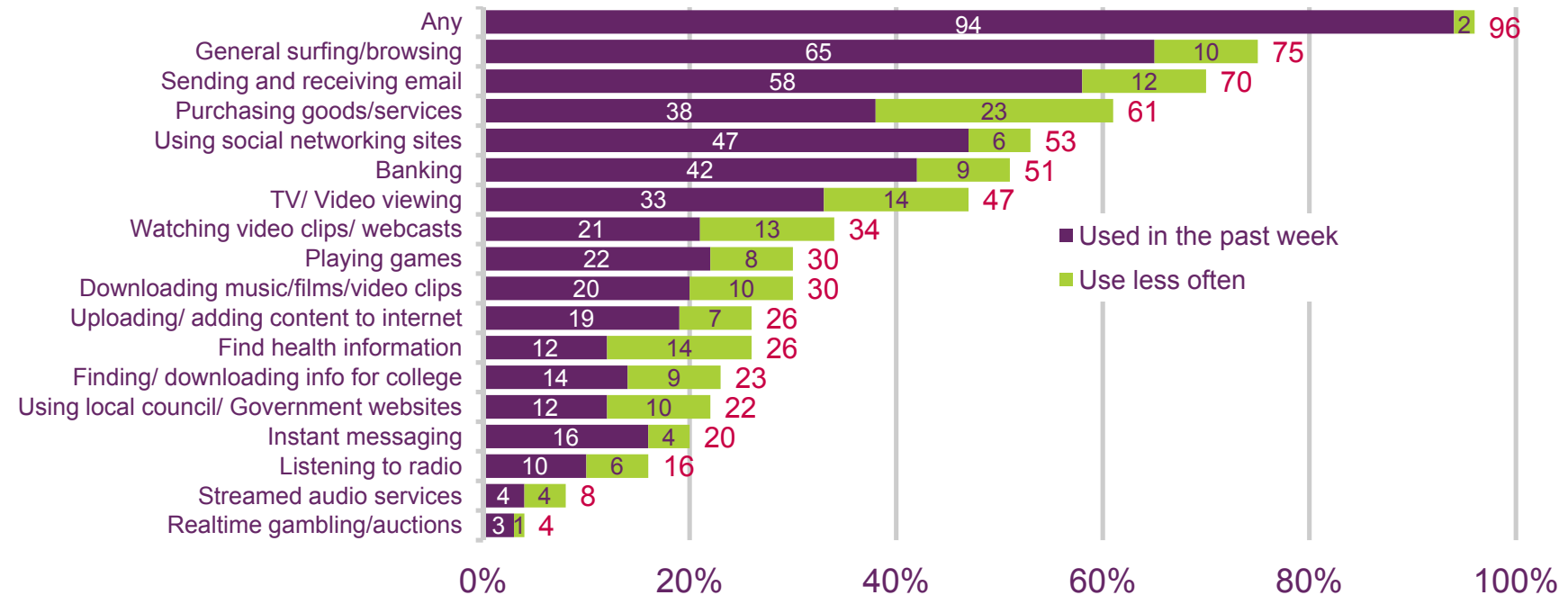
QB1. Which of the following do you, or does anyone in your household, have in your home at the moment? / QB2. And do you personally use... / QB6. Does your household's e-reader have built-in 3G access to a mobile network?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural)

Activities conducted online by broadband users.

Individuals (%)



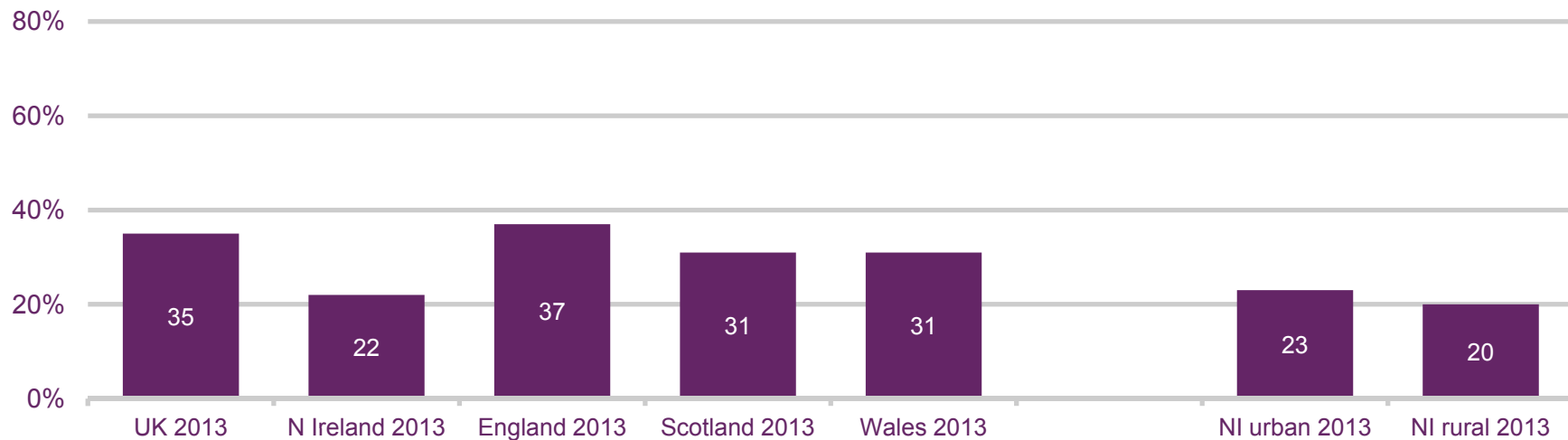
QE5. Which, if any, of these do you use the internet for?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a broadband connection at home (n= 363 Northern Ireland 2013)

Use of the internet to access local council/government websites

Use of internet for local council/government websites (%)



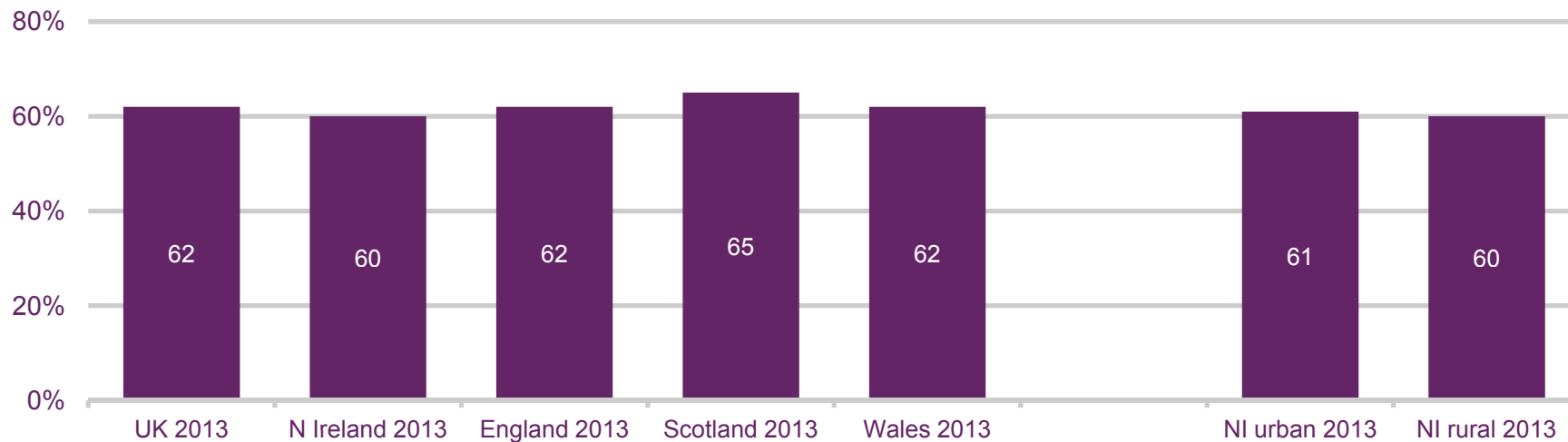
QE5A-B. Which, if any, of these do you use the internet for?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK, 376 Northern Ireland, 1787 England, 394 Scotland, 361 Wales, 185 Northern Ireland urban, 191 Northern Ireland rural)

Use of the internet to purchase goods, services, tickets

Use of internet for purchasing goods, services and tickets (%)



QE5A-B. Which, if any, of these do you use the internet for?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK, 376 Northern Ireland, 1787 England, 394 Scotland, 361 Wales, 185 Northern Ireland urban, 191 Northern Ireland rural)

Use of social networking sites



QE5A-B. Which, if any, of these do you use the internet for?/ And, which, if any, of these activities have you used the internet for in the last week?/
 QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?

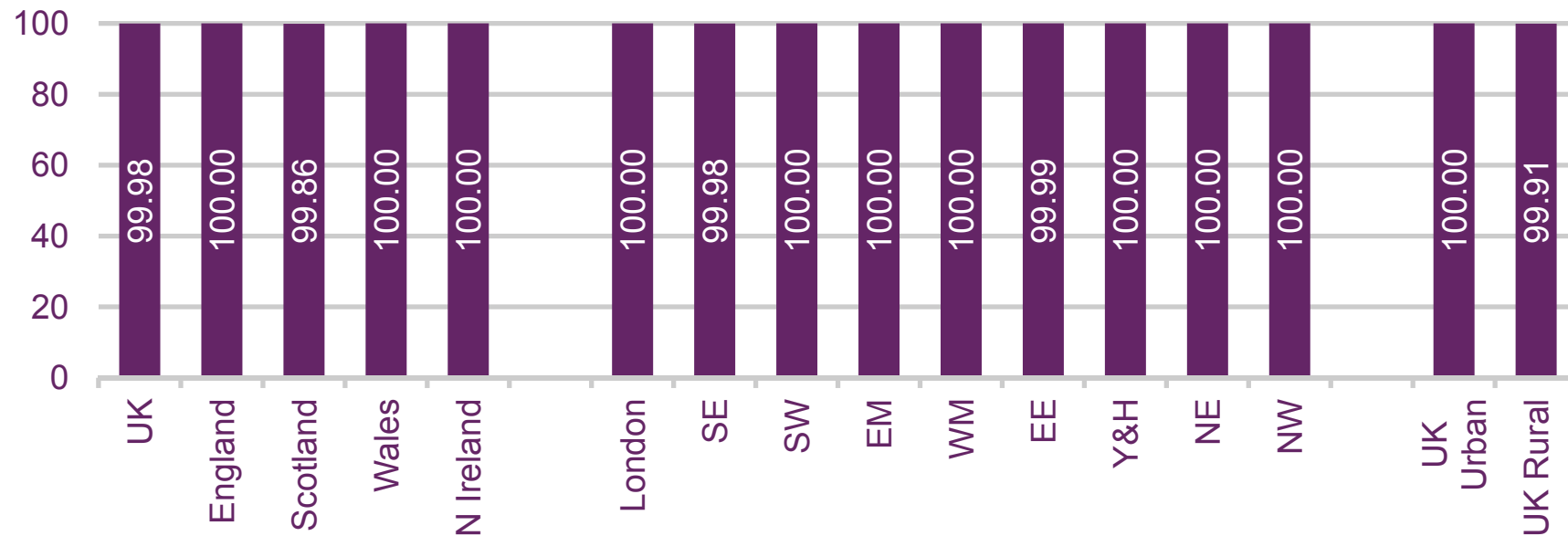
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural)

Telecoms and networks

Proportion of premises connected to an ADSL-enabled BT exchange

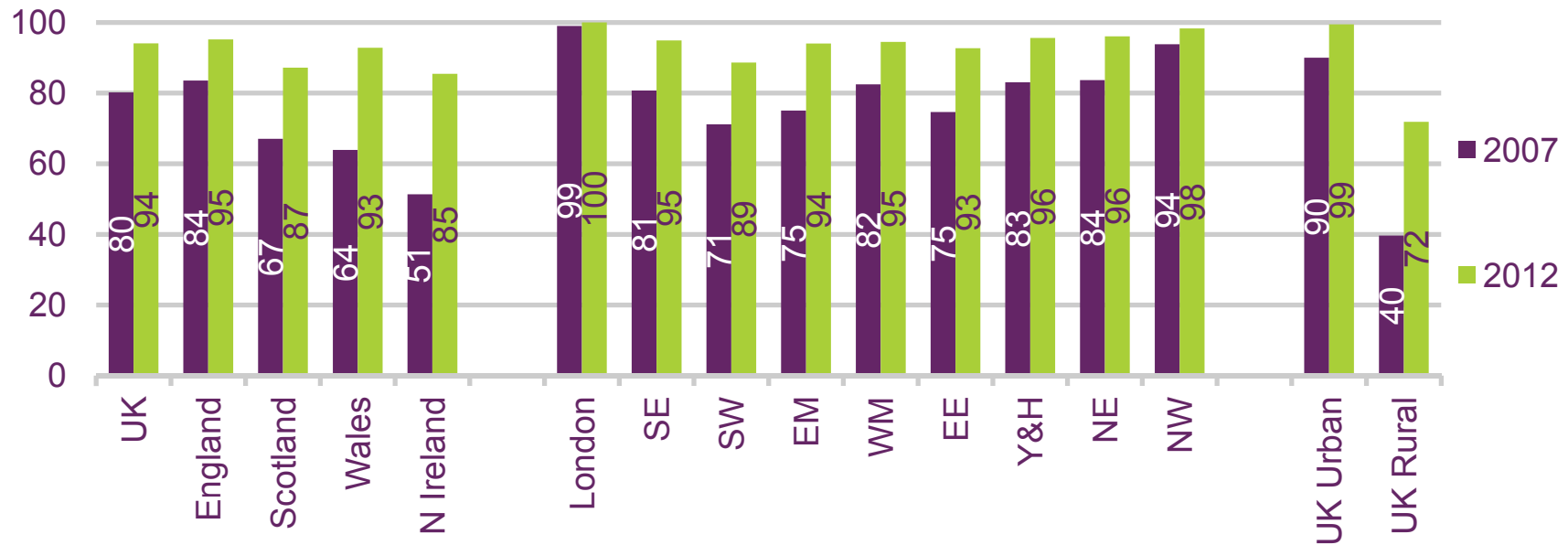
Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

Proportion of premises in connected to an unbundled local exchange

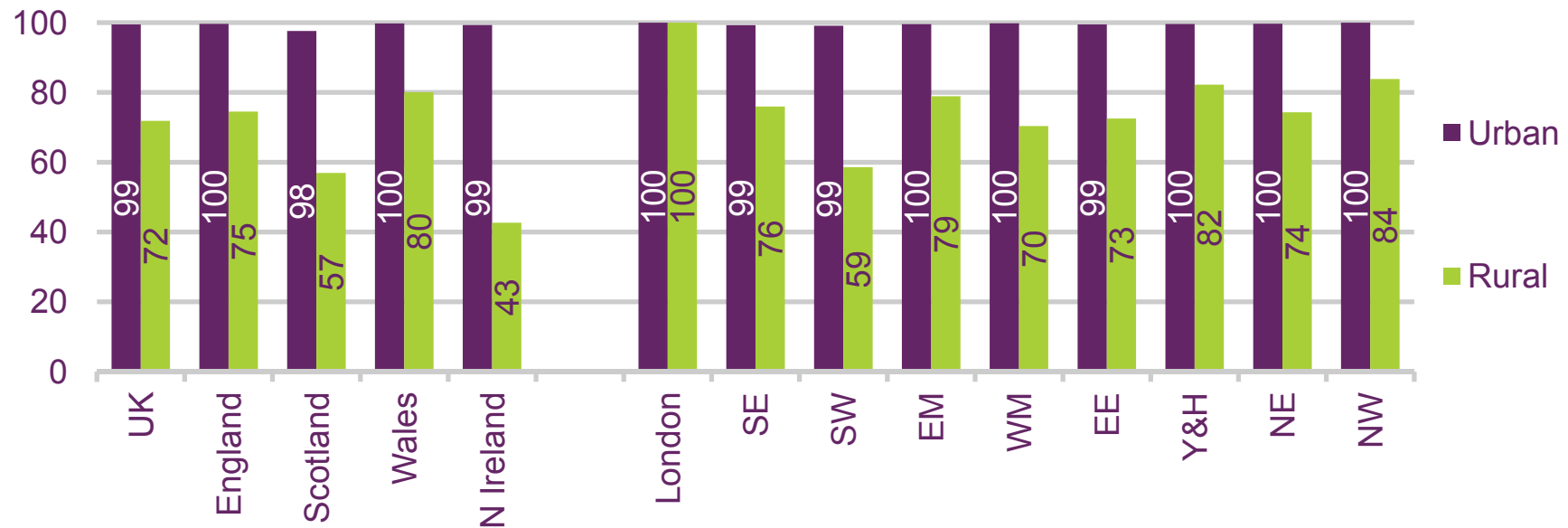
Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

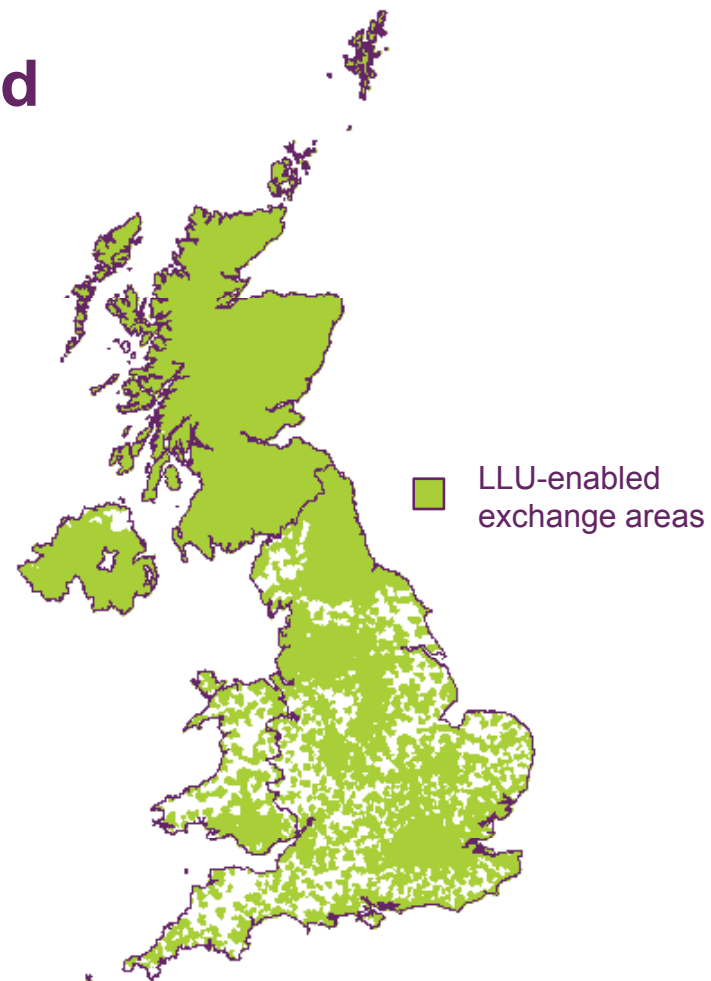
Proportion of premises in urban and rural areas connected to an unbundled exchange

Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

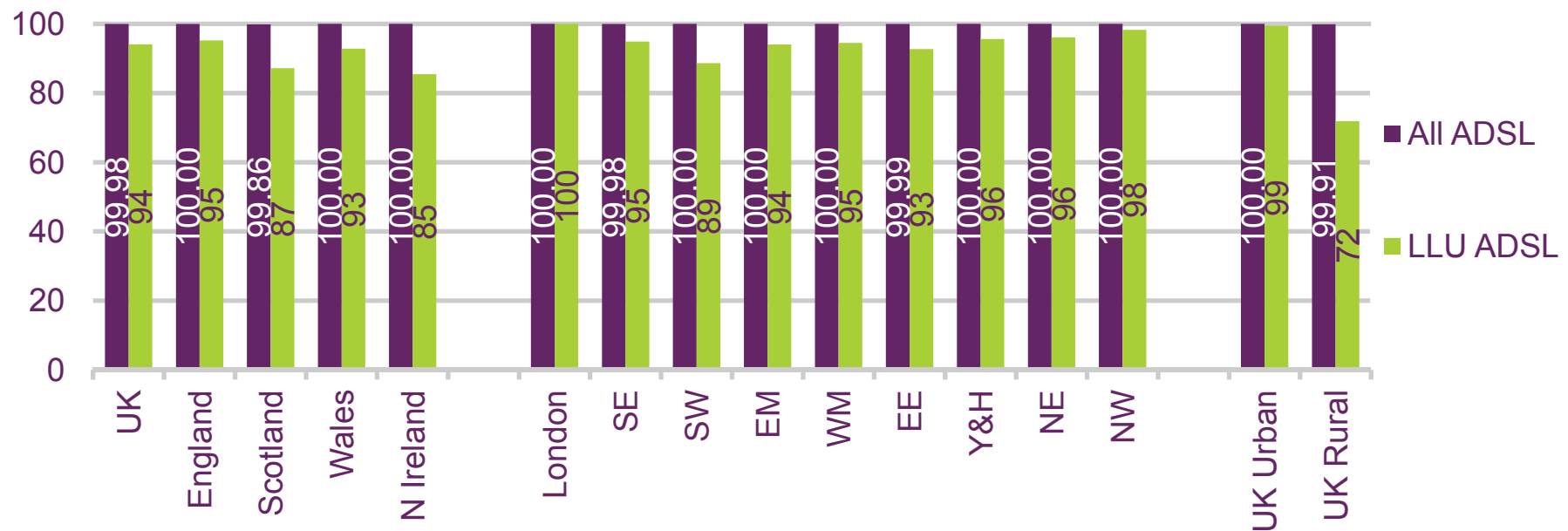
Map showing areas served by unbundled local exchanges



Source: Ofcom / BT, December 2012 data

Proportion of premises connected to ADSL-enabled and LLU-enabled exchanges

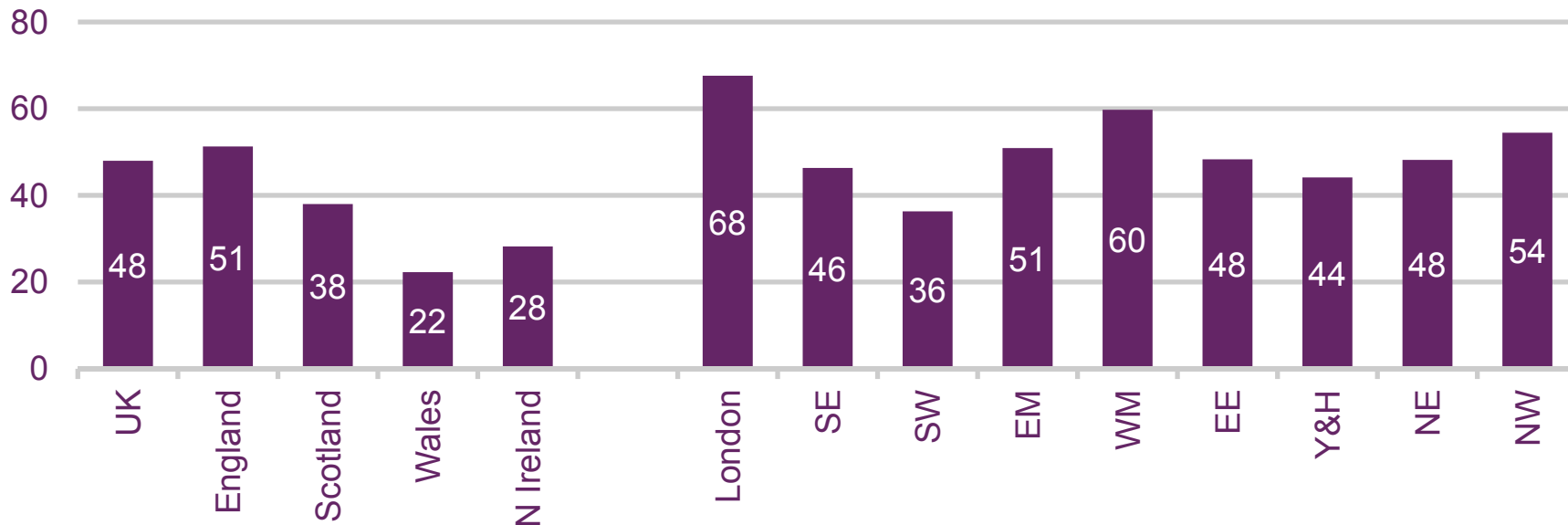
Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

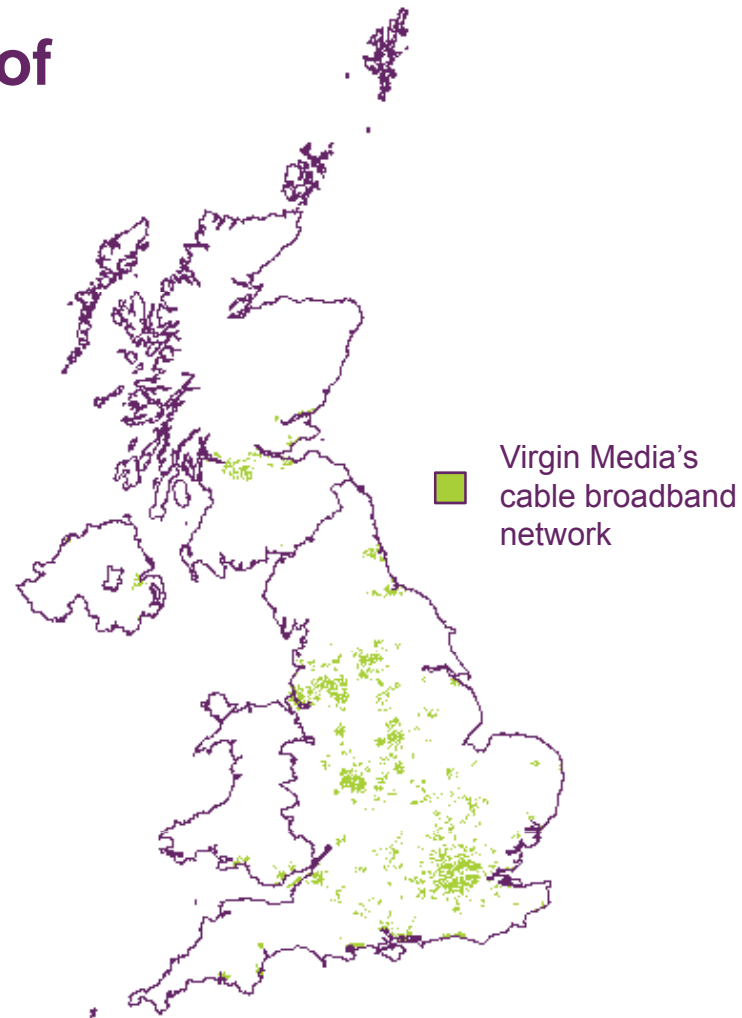
Proportion of premises passed by Virgin Media cable broadband

Proportion of premises (per cent)



Source: Ofcom / Virgin Media, June 2013 data

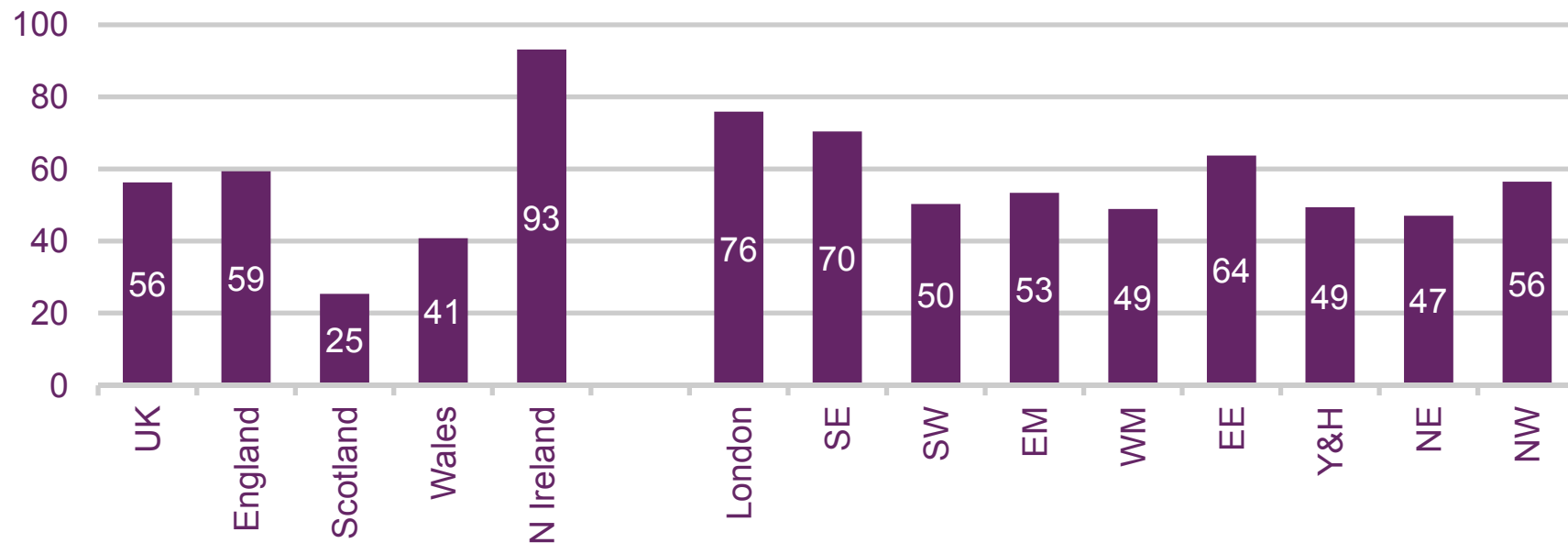
Map of the availability of Virgin Media's cable broadband network



Source: Ofcom / Virgin Media, June 2013 data

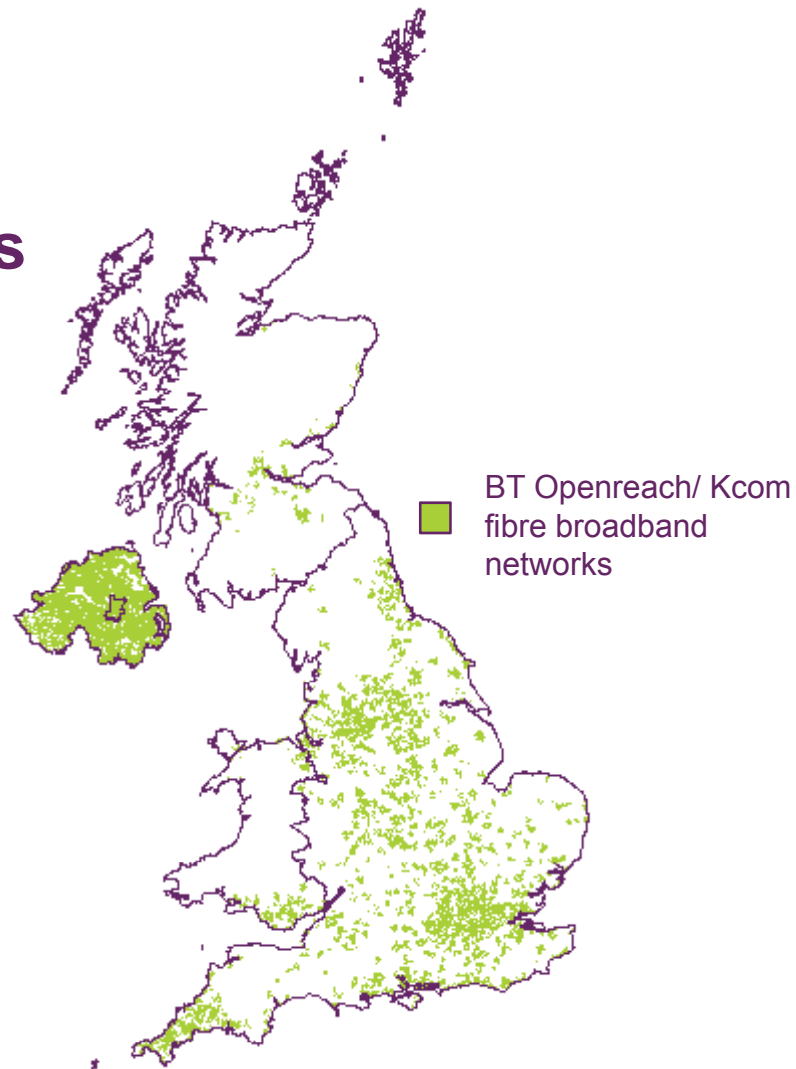
Proportion of premises in postcodes served by BT Openreach/ Kcom's fibre broadband network

Proportion of premises (per cent)



Source: Ofcom / operators, June 2013 data

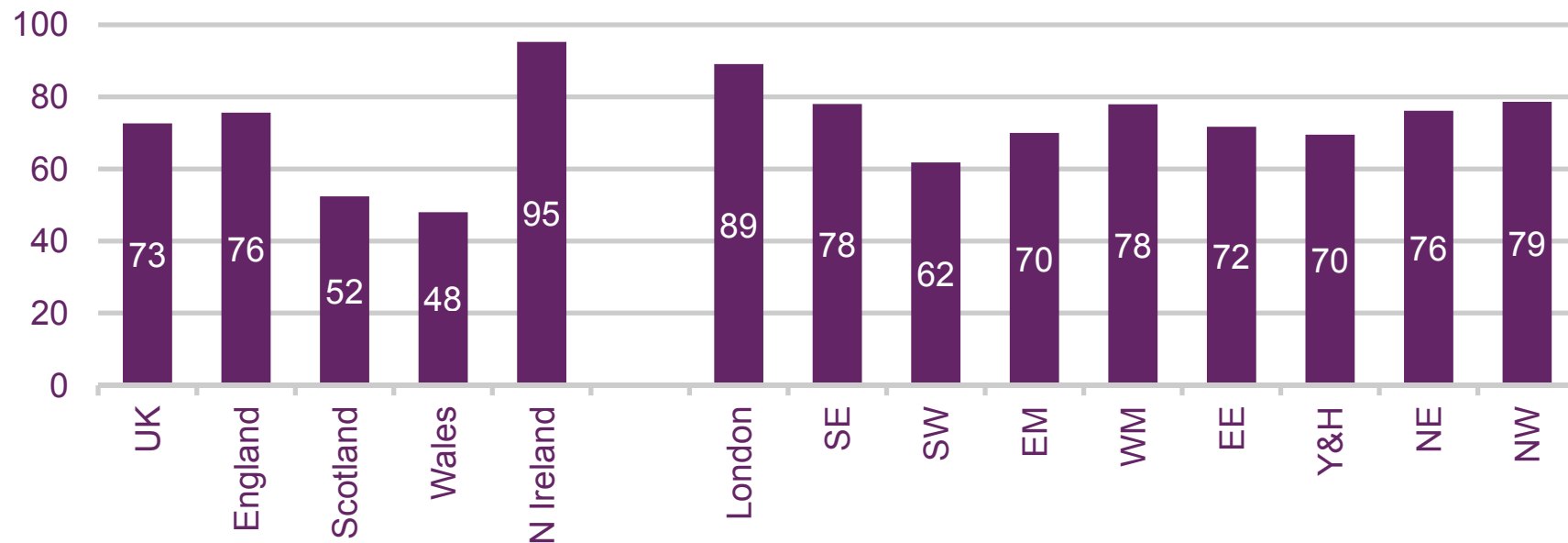
Map of the availability of BT Openreach/ Kcom's fibre broadband networks



Source: Ofcom / BT / Virgin Media, June 2013 data

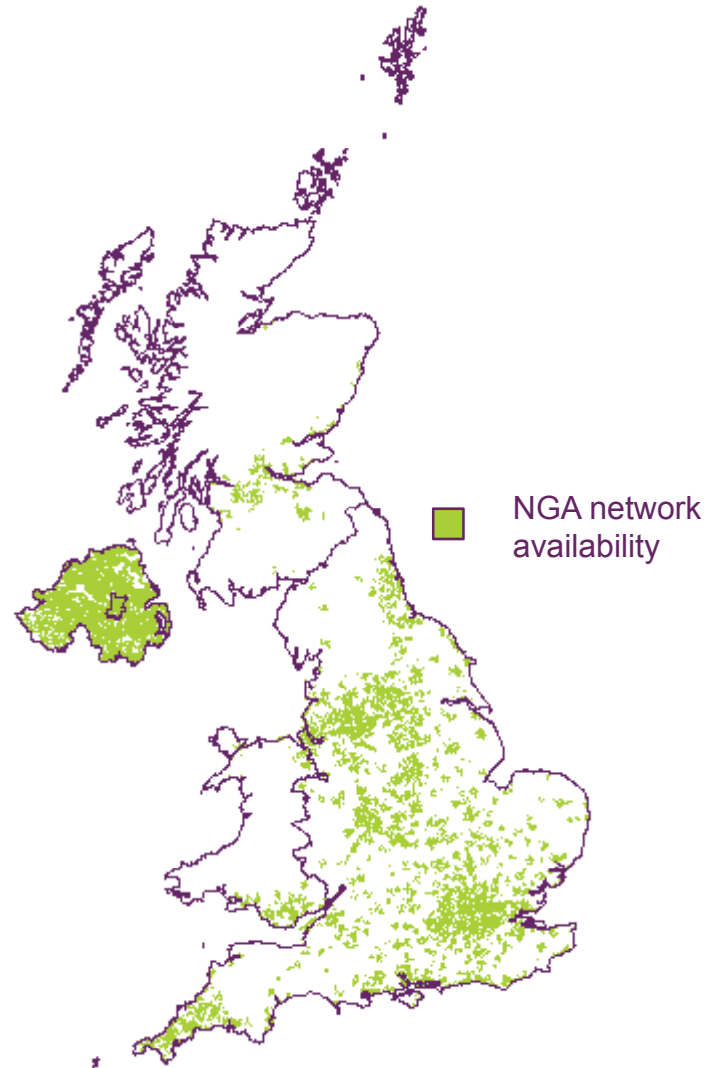
Proportion of premises in postcodes served by NGA networks

Proportion of premises (per cent)



Source: Ofcom / operators, June 2013 data

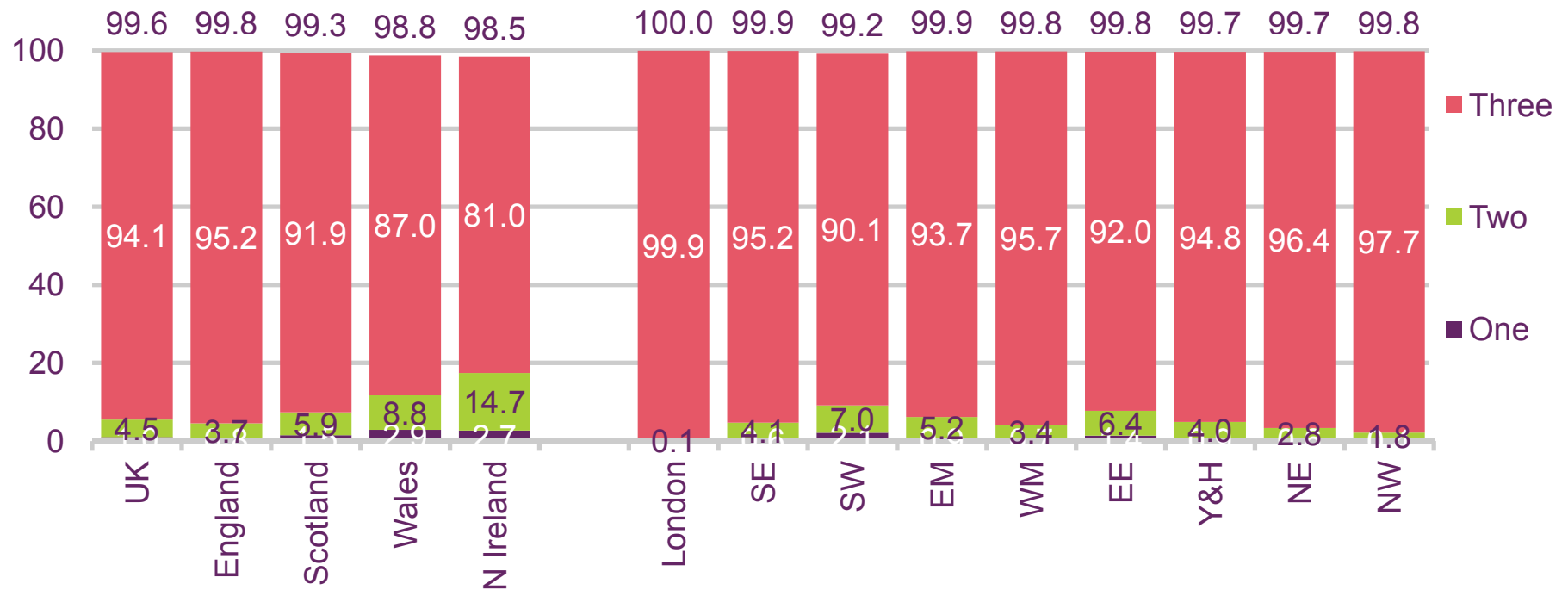
Map of the availability of NGA networks



Source: Ofcom / BT / Virgin Media, June 2013 data

2G mobile premises coverage, by number of operators

Proportion of premises (per cent)

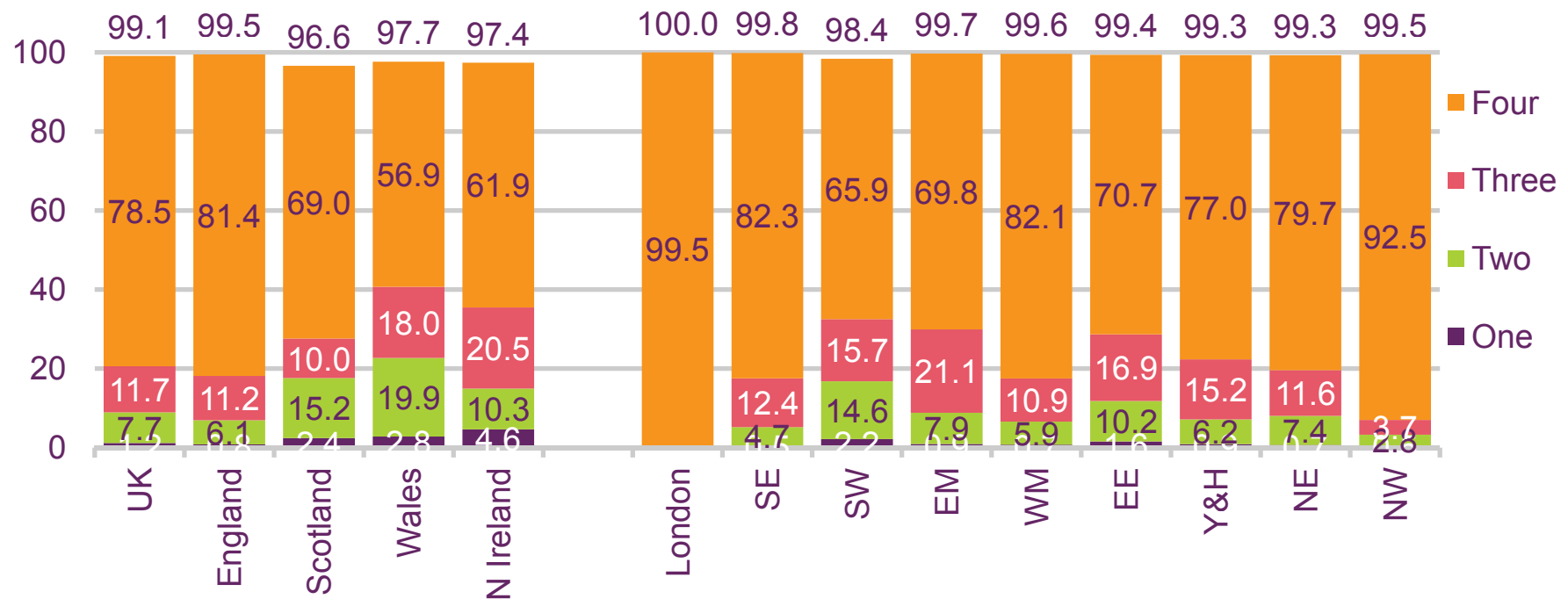


Source: Ofcom based on operator data.

Note: Coverage is based on 200m square pixels covering the UK

3G mobile premises coverage, by number of operators

Proportion of premises (per cent)



Source: Ofcom based on operator data.

Note: Coverage is based on 200m square pixels covering the UK using an enhanced methodology

Take-up of communications services, 2013

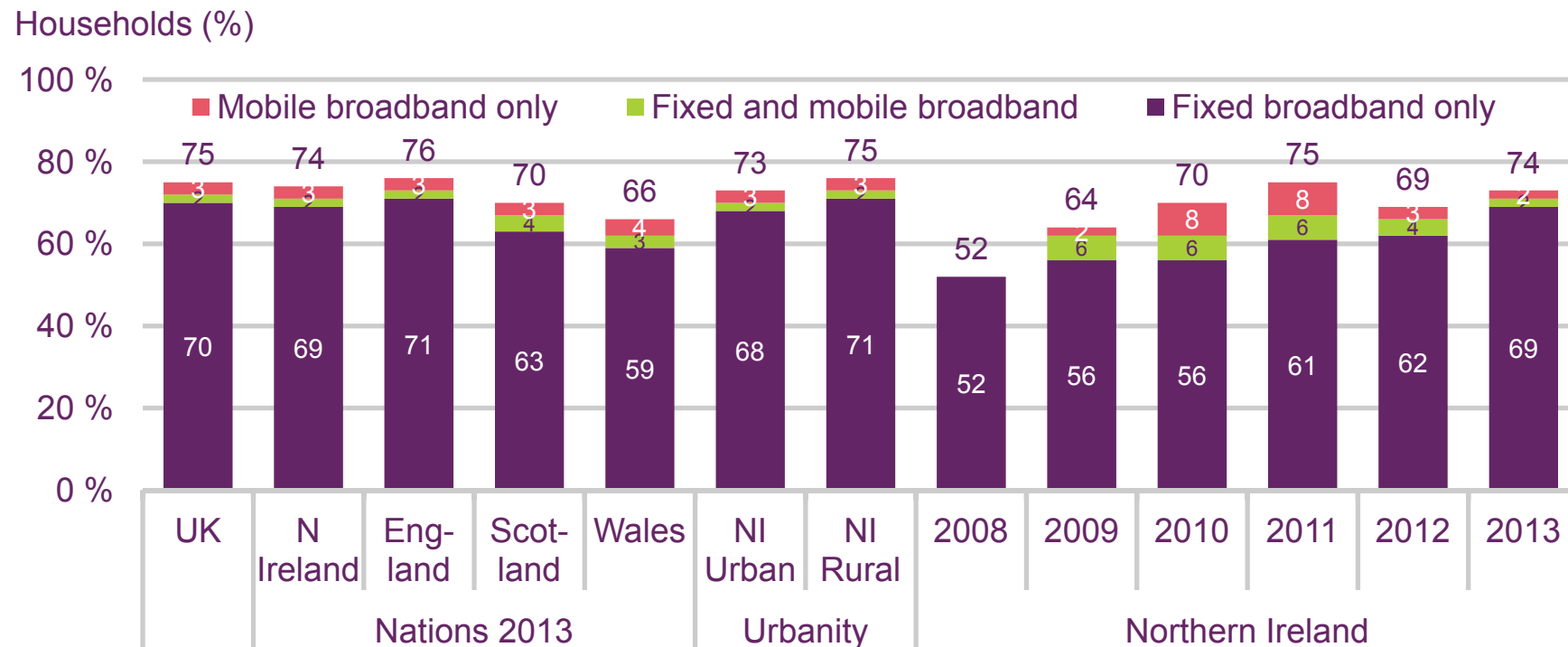
		UK	N Ireland	England	Scotland	Wales	NI urban	NI rural
Individual								
Voice telephony	Fixed Line	84%	82%	85%	83%	76%	78%	89%
	Mobile phone	92%	94%	92%	92%	92%	95%	91%
	Smartphone	51%	45%	52%	45%	49%	51%	35%
	Mobile-only homes	15%	18%	15%	16%	23%	22%	11%
Internet	Total Internet	80%	78%	81%	76%	75%	78%	79%
	Broadband (fixed and mobile)	75%	74%	76%	70%	66%	73%	75%
	Fixed Broadband	72%	71%	73%	67%	63%	70%	72%
	Mobile Broadband	5%	5%	5%	7%	7%	5%	5%
	Mobile internet	49%	45%	49%	44%	47%	51%	35%

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?/ QD24B. Do you personally use a smartphone?/ 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?/ QD28A. 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 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural)

Consumer broadband take-up in Northern Ireland, by connection type

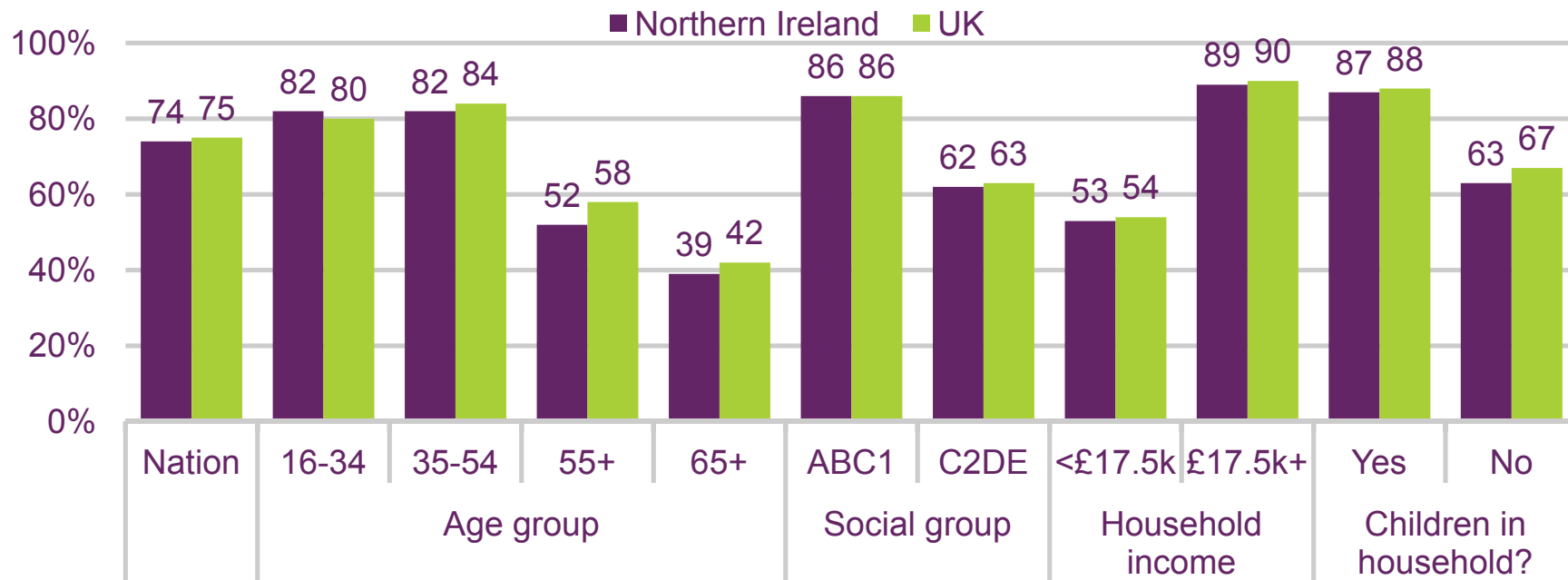


Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013). QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Consumer broadband take-up in Northern Ireland

Households (%)

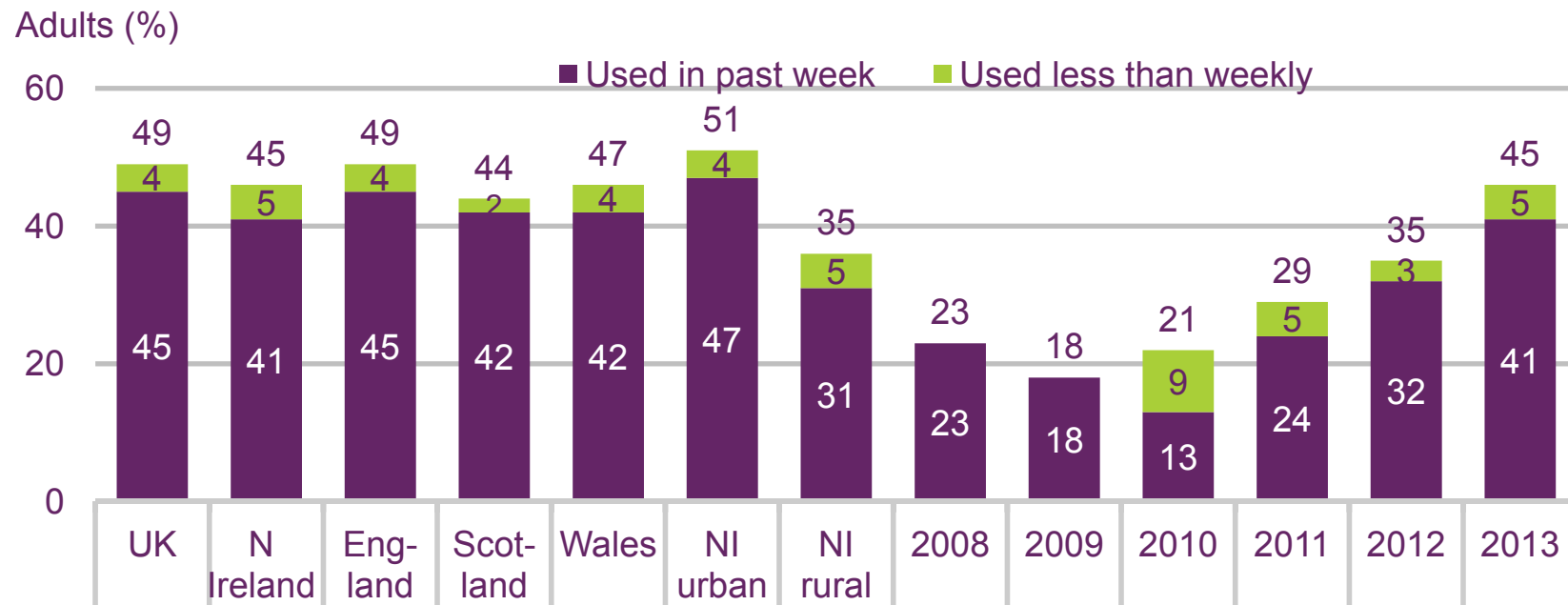


Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+

QE9. Which of these methods does your household use to connect to the internet at home?

Proportion of adults who have used a mobile phone to access the internet



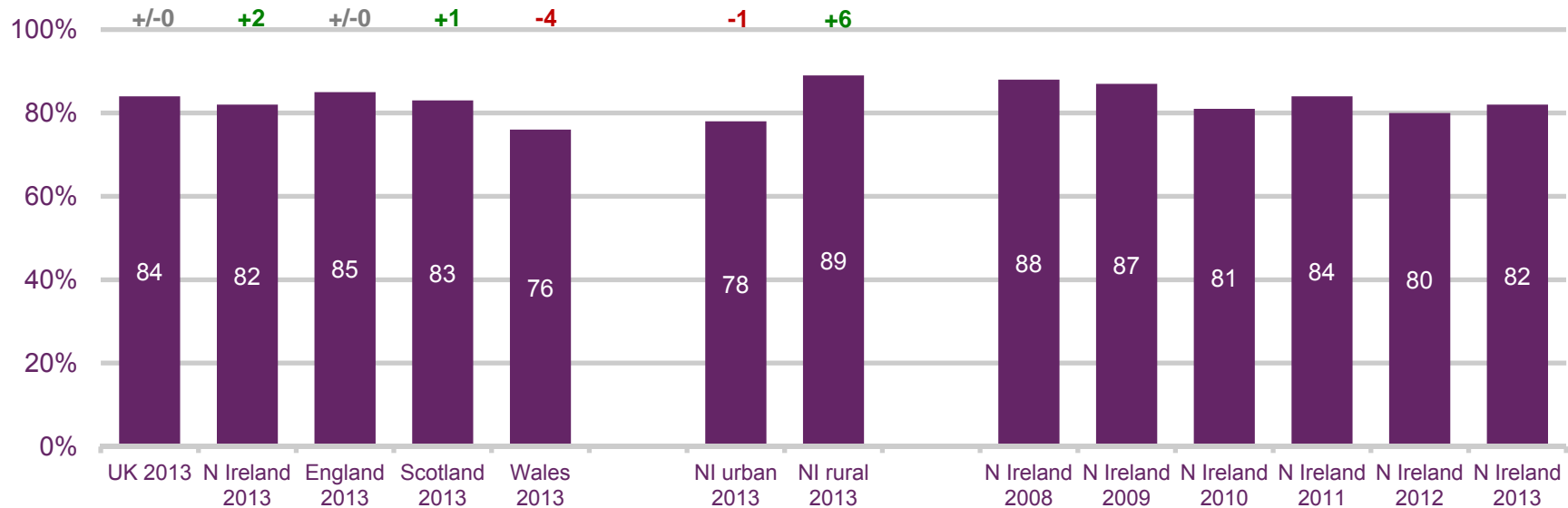
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Fixed line take-up

Figure above bar shows % point change in fixed line take-up from Q1 2012



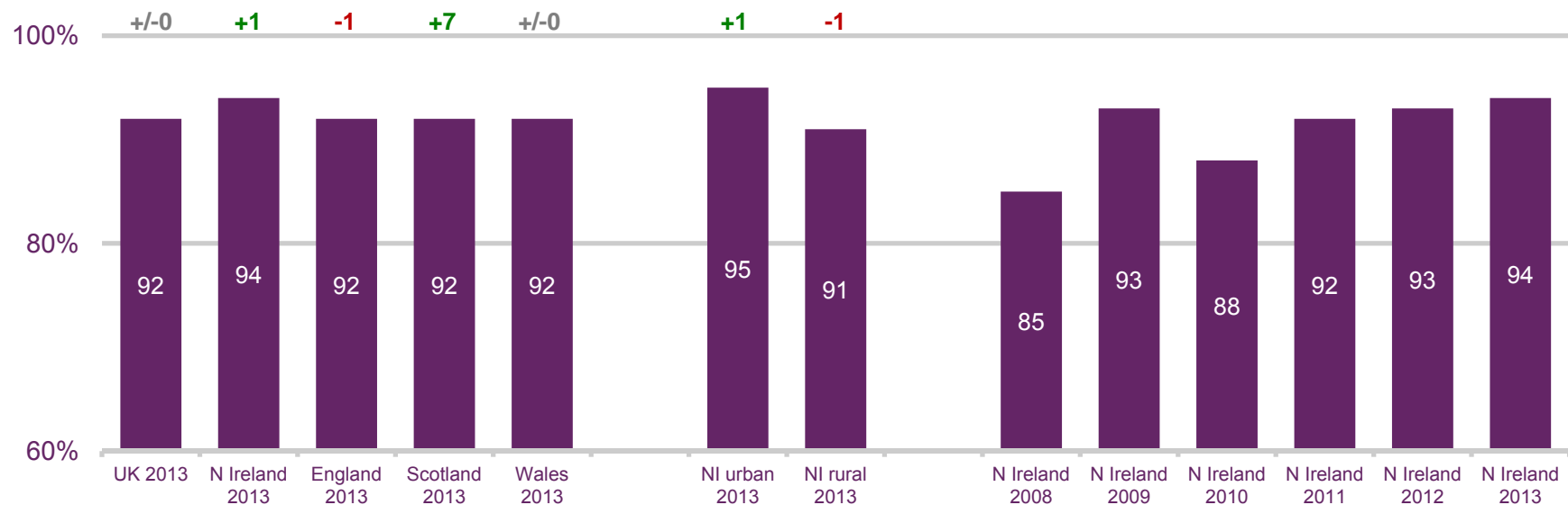
QC1. Is there a landline phone in your home that can be used to make and receive calls?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Mobile take-up

Figure above bar shows % point change in use of mobile phones from Q1 2012



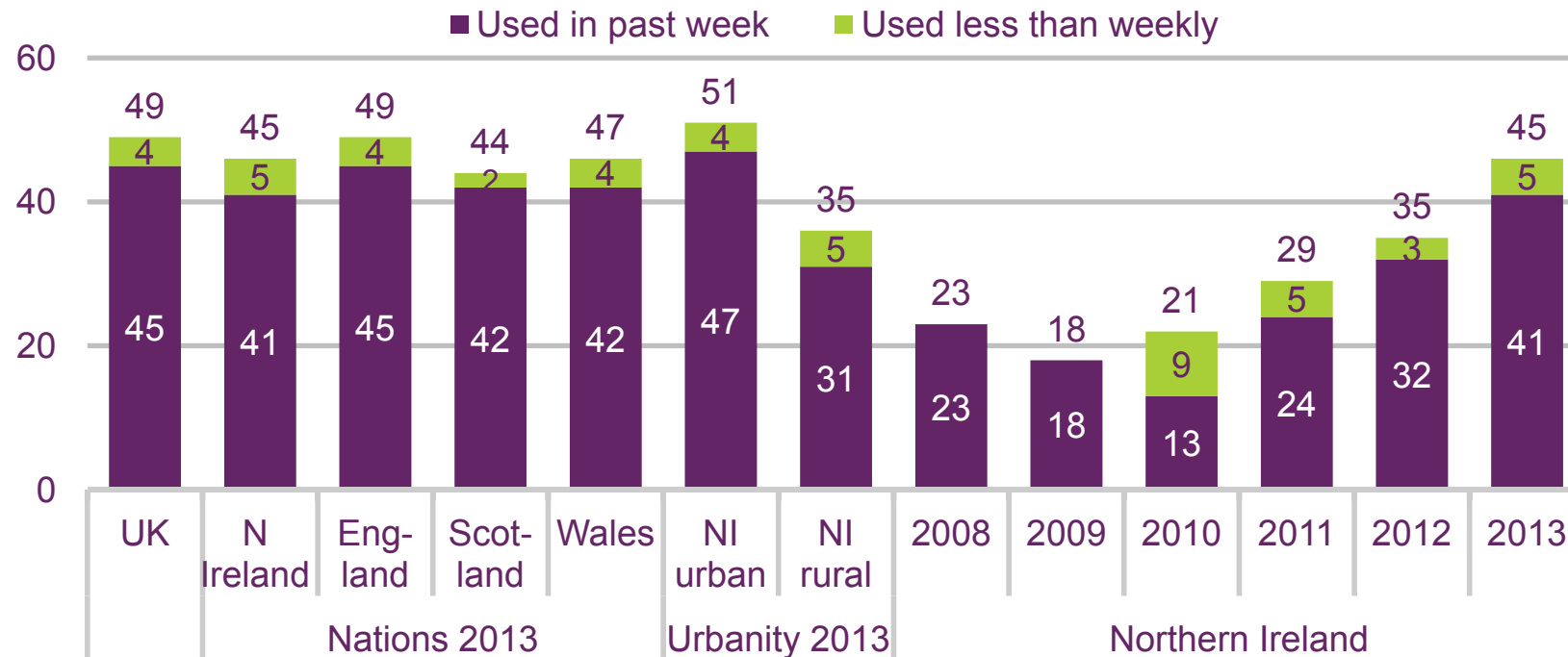
QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Use of mobile phone to access the internet

Adults (%)



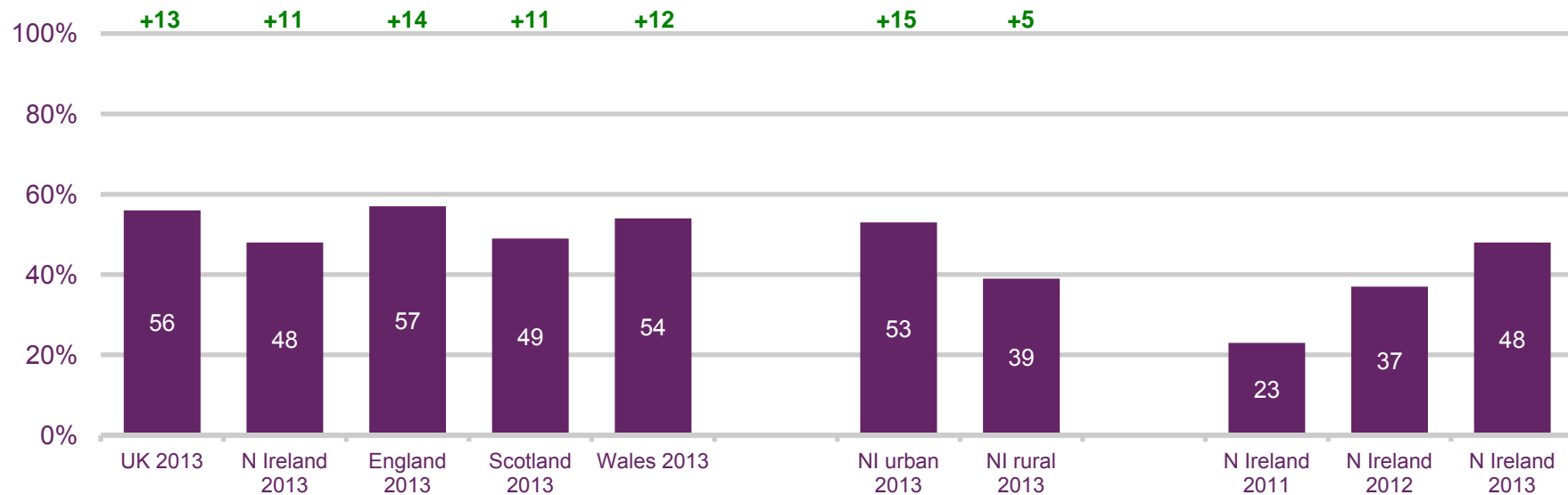
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+

QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Take-up of smartphones

Figure above bar shows % point change in use of mobile phones from Q1 2012



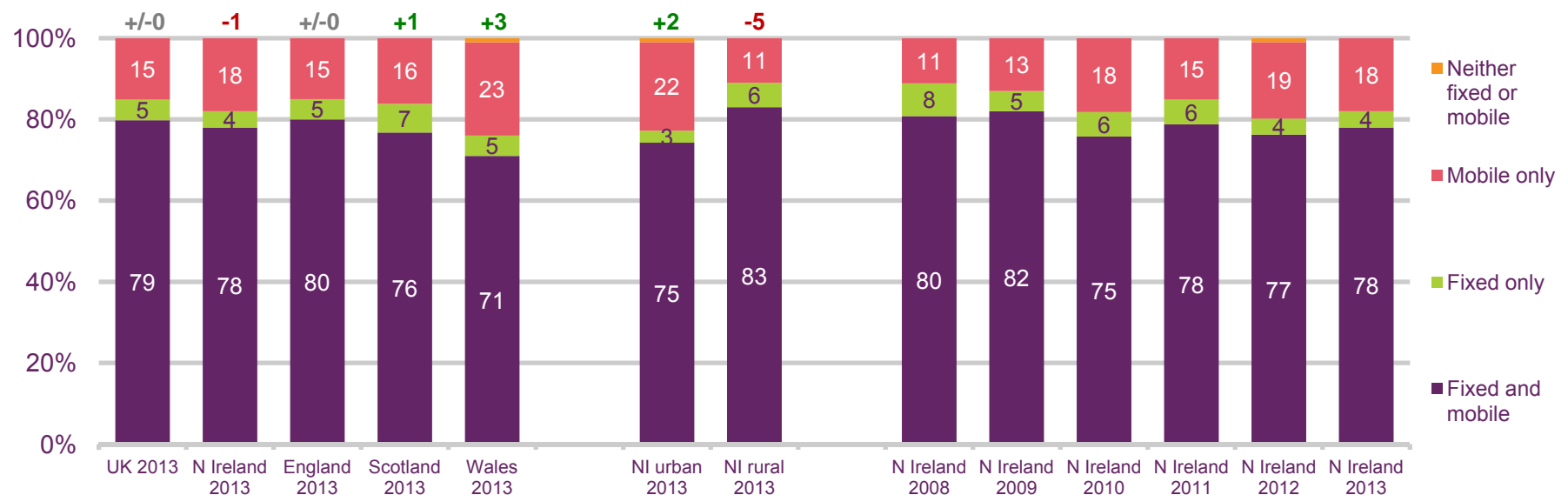
QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 463 Northern Ireland, 2020 England, 464 Scotland, 440 Wales, 237 Northern Ireland urban, 226 Northern Ireland rural, 464 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013)

Cross-ownership of household telephony services

Figure above bar shows % point change in mobile only from Q1 2012

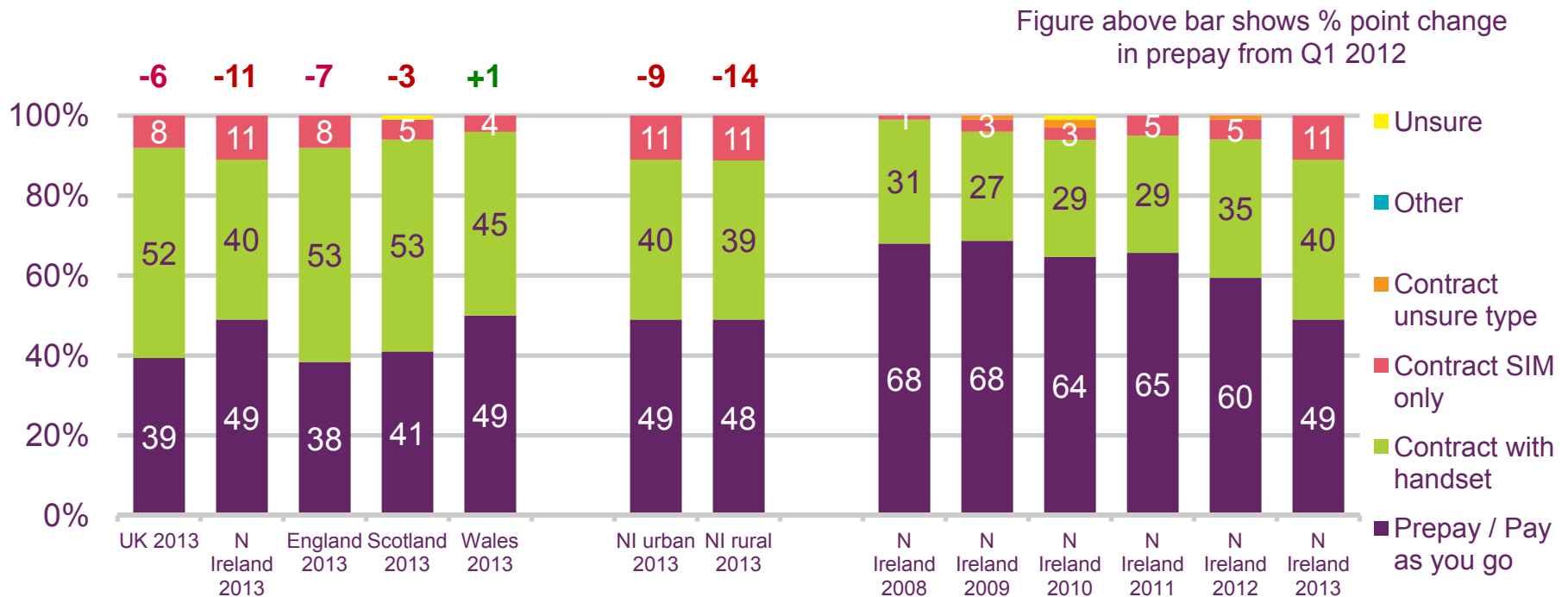


QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

Type of mobile subscription



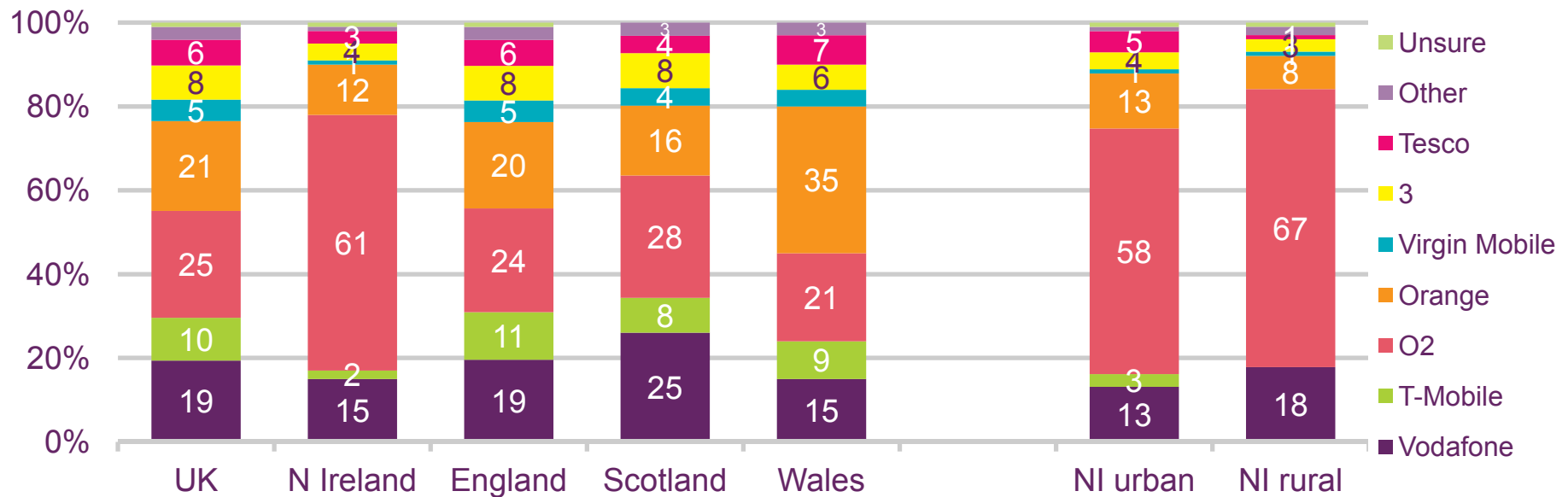
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone

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

Mobile network provider used most often

Proportion of mobile users (%)

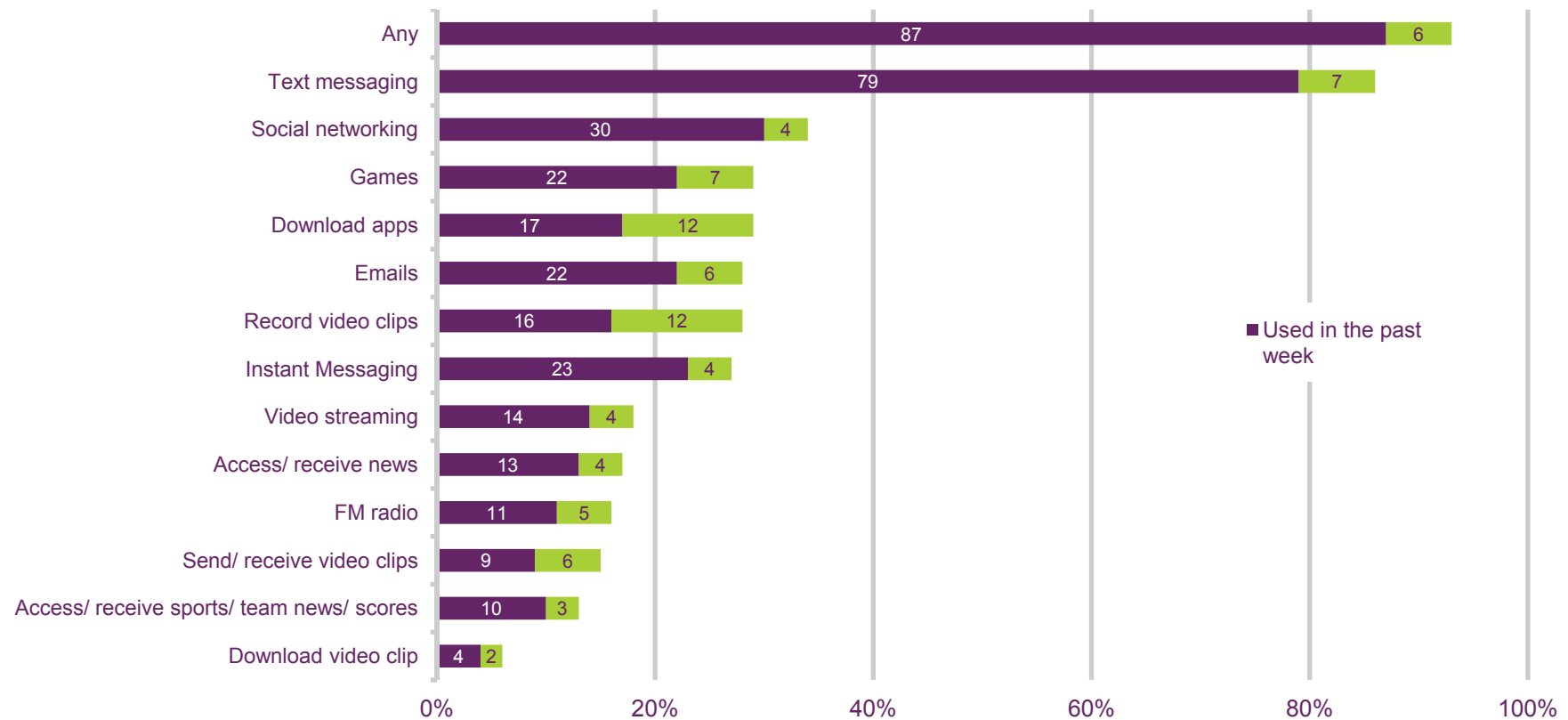


Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone

QD10. Which mobile network do you use most often?

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?

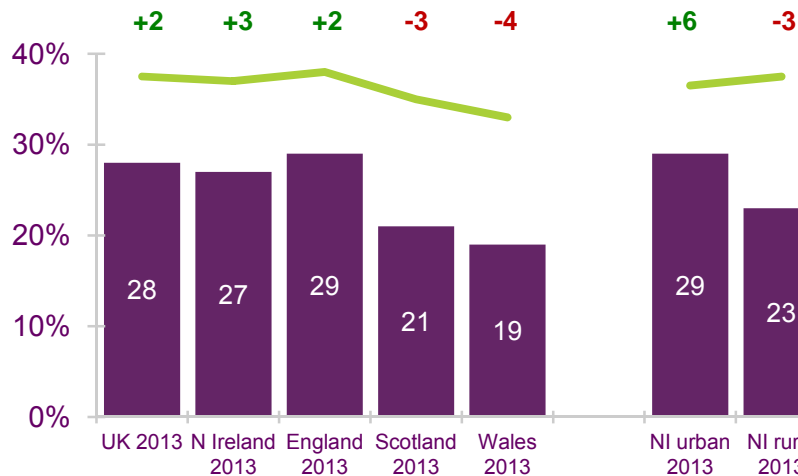
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n= 463 Northern Ireland 2013)

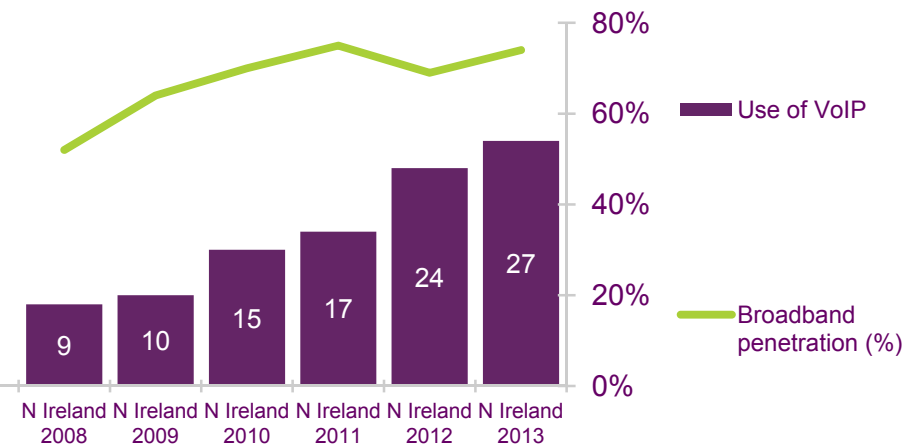
Individual use of Voice over IP

Figure above bar shows % point change in current use of VoIP from Q1 2012

Individual use of VoIP



Proportion of individuals with broadband at home



QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?/QE5. Which, if any, of these do you use the internet for? *NB 2013 measure combines responses from internet users (at QE5A) and all UK adults (at QE30), data not comparable with previous years. *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 507 Northern Ireland, 2250 England, 501 Scotland, 492 Wales 254 Northern Ireland urban, 253 Northern Ireland rural, 629 Northern Ireland 2008, 652 Northern Ireland 2009, 761 Northern Ireland 2010, 511 Northern Ireland 2011, 508 Northern Ireland 2012, 507 Northern Ireland 2013)

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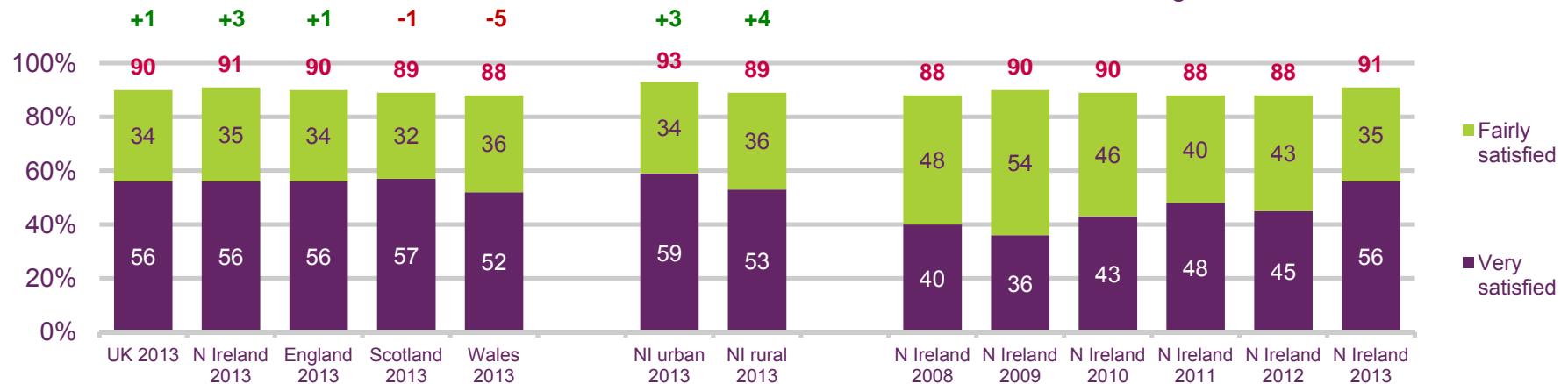
KRB1

VoIP added to QE5 codeframe in 2012 - don't have combined figure in previous years, so 2008-2012 based on QE30 only

Kay Rossiter-Base, 22/03/2013

Overall satisfaction with fixed line services

Figure above bar shows % point change in total satisfied from Q1 2012



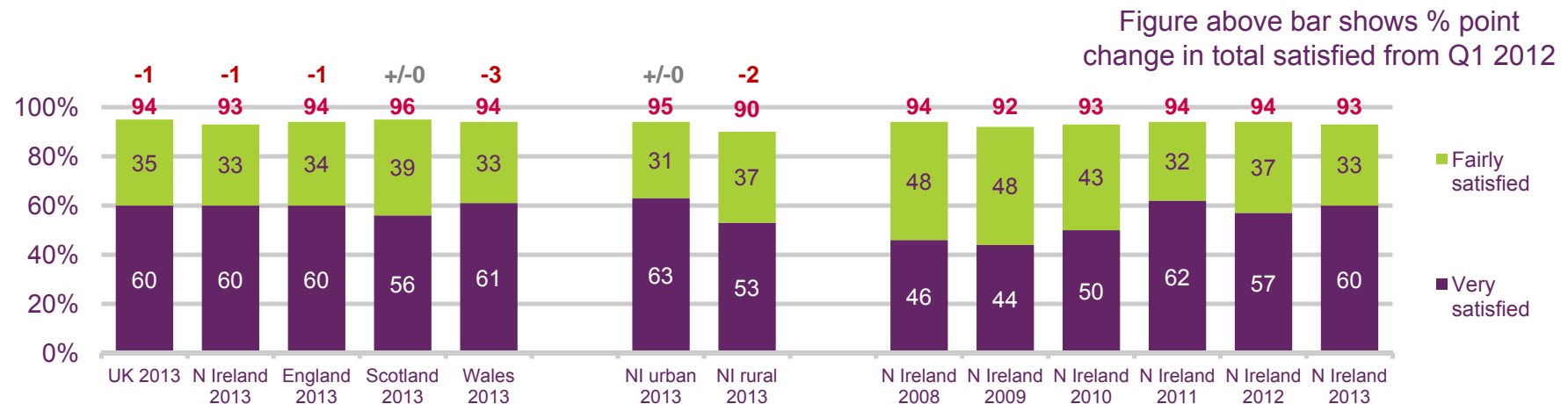
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a landline phone at home (n = 3135 UK, 424 Northern Ireland, 1891 England, 425 Scotland, 395 Wales, 199 Northern Ireland urban, 225 Northern Ireland rural, 530 Northern Ireland 2008, 567 Northern Ireland 2009, 628 Northern Ireland 2010, 434 Northern Ireland 2011, 415 Northern Ireland 2012, 424 Northern Ireland 2013)

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



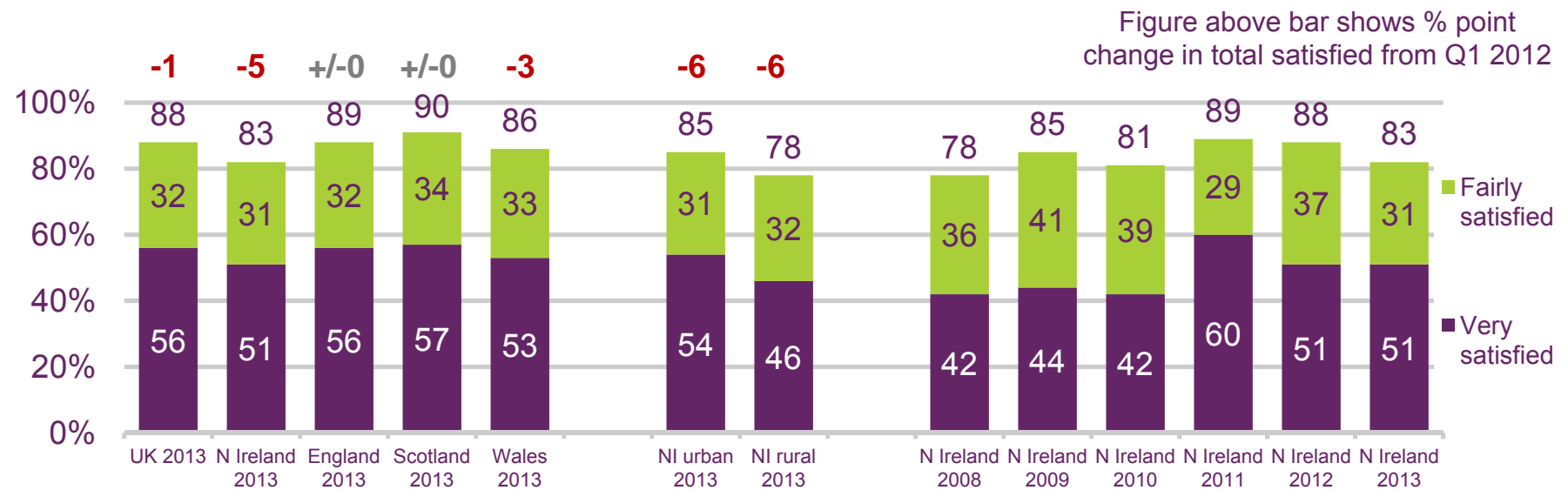
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 463 Northern Ireland, 2020 England, 464 Scotland, 440 Wales, 237 Northern Ireland urban, 226 Northern Ireland rural, 744 Northern Ireland 2008, 877 Northern Ireland 2009, 658 Northern Ireland 2010, 425 Northern Ireland 2011, 463 Northern Ireland 2012, 463 Northern Ireland 2013)

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

Satisfaction with mobile reception

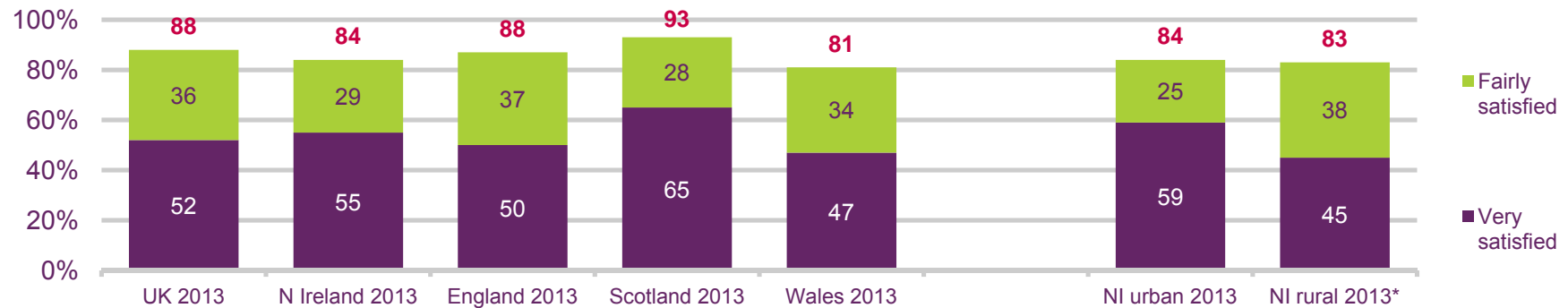


Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone

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

Satisfaction with ability to connect to the internet via 3G network



QD21k. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for ability to connect to the internet using the mobile network (3G)?

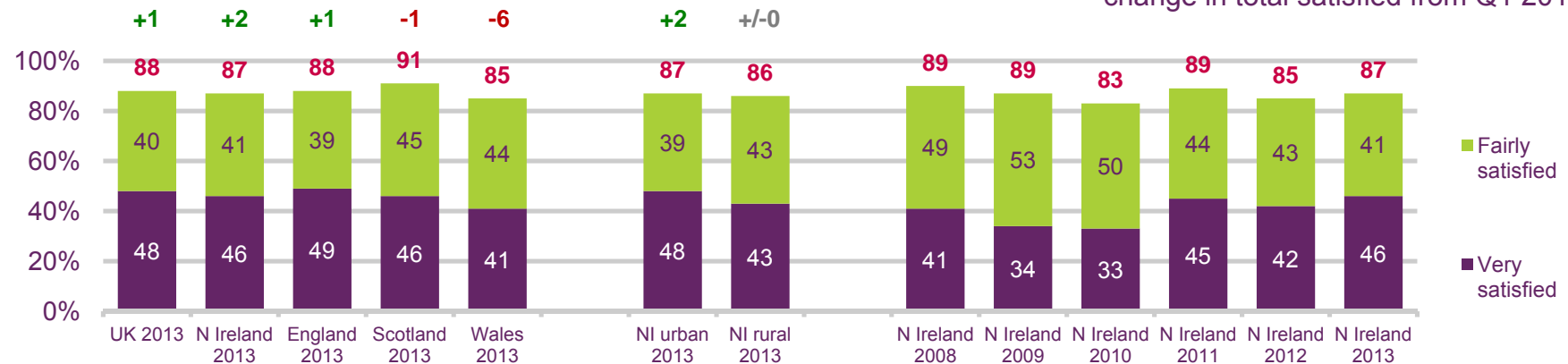
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a smartphone (n = 1683 UK, 199 Northern Ireland, 1052 England, 220 Scotland, 212 Wales, 111 Northern Ireland urban, 88 Northern Ireland rural) *Caution: Low base size

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with the ability to connect to the internet using the mobile network

Overall satisfaction with fixed broadband service

Figure above bar shows % point change in total satisfied from Q1 2012



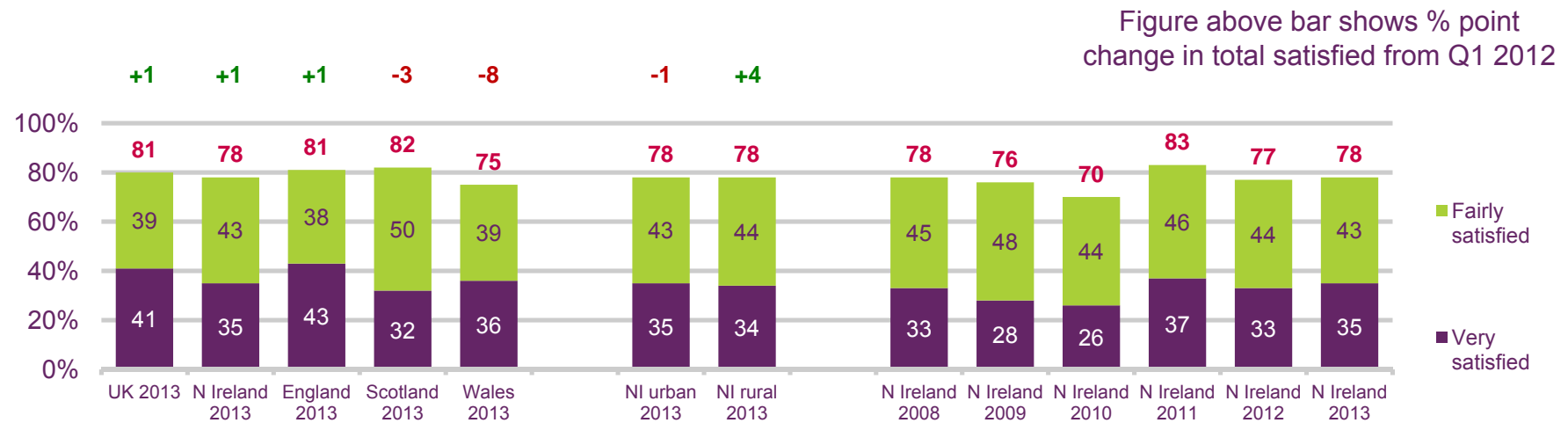
QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2548 UK, 351 Northern Ireland, 1562 England, 341 Scotland, 294 Wales, 173 Northern Ireland urban, 178 Northern Ireland rural, 319 Northern Ireland 2008, 388 Northern Ireland 2009, 469 Northern Ireland 2010, 335 Northern Ireland 2011, 331 Northern Ireland 2012, 351 Northern Ireland 2013)

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)?

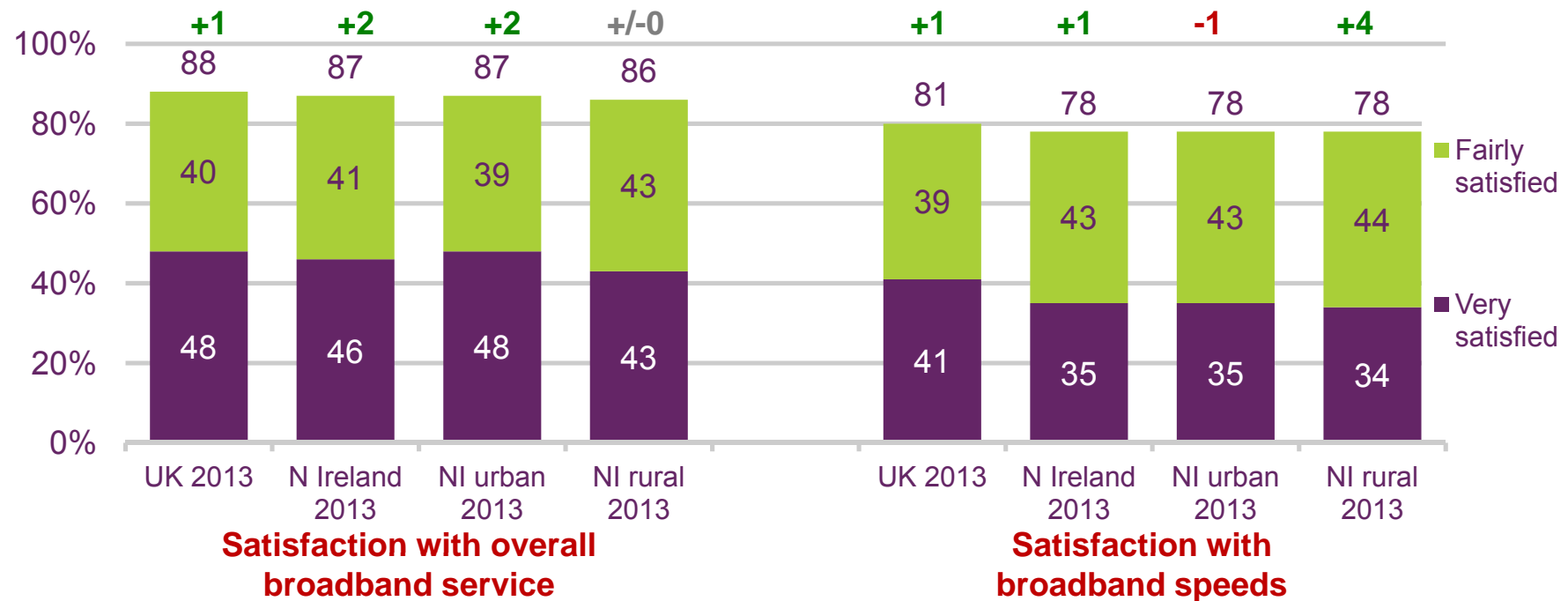
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2548 UK, 351 Northern Ireland, 1562 England, 341 Scotland, 294 Wales, 173 Northern Ireland urban, 178 Northern Ireland rural, 319 Northern Ireland 2008, 388 Northern Ireland 2009, 469 Northern Ireland 2010, 335 Northern Ireland 2011, 331 Northern Ireland 2012, 351 Northern Ireland 2013)

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

Satisfaction with fixed broadband service and fixed broadband speeds

Figure above bar shows % point change in total satisfied from Q1 2012

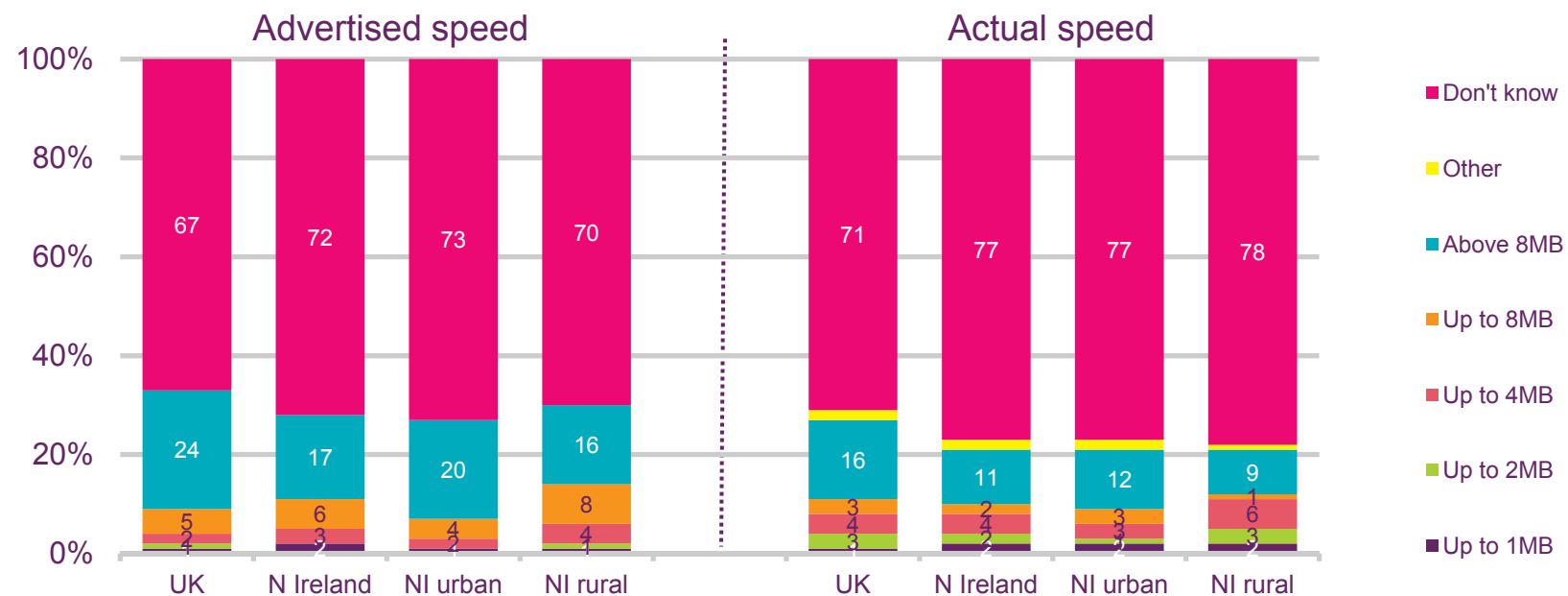


Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a fixed broadband connection at home

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?

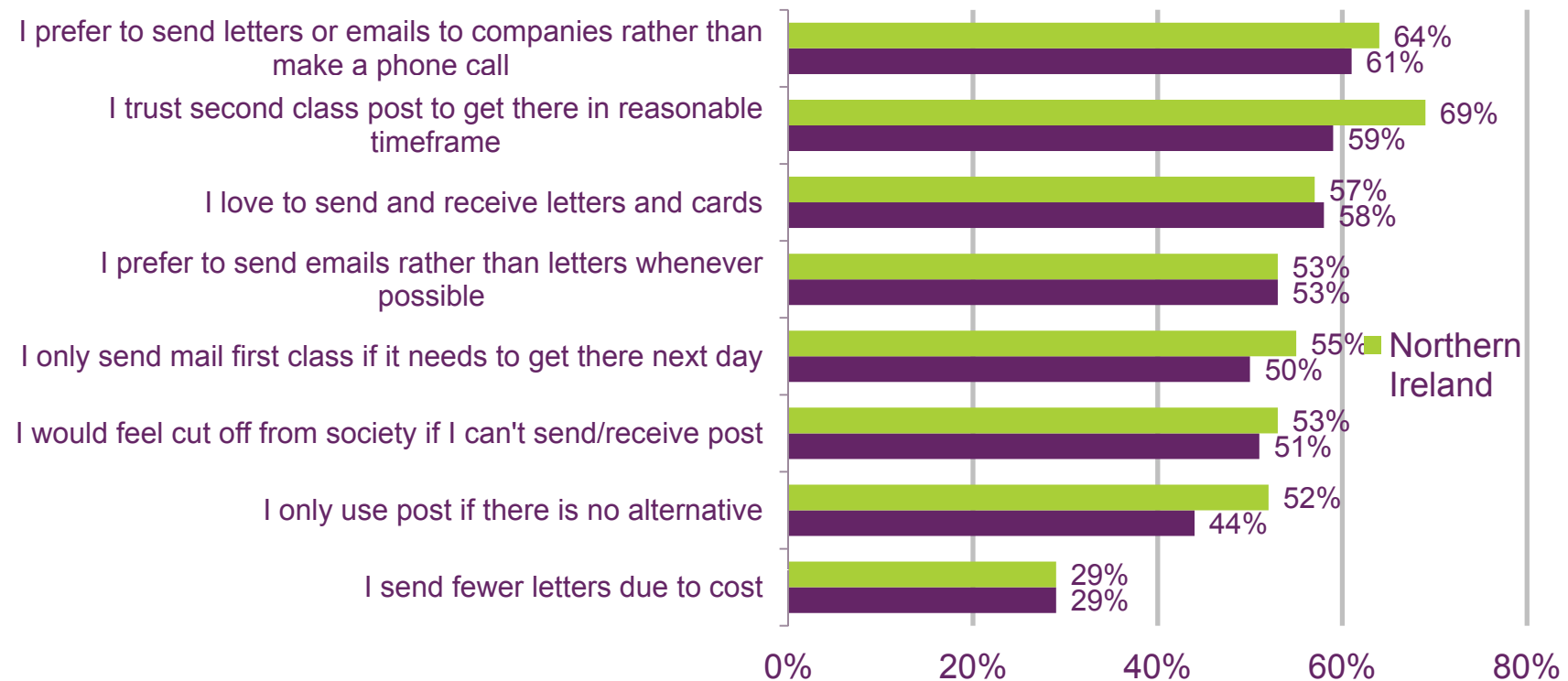
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with broadband connection at home (n = 2548 UK, 351 Northern Ireland, 173 Northern Ireland urban, 178 Northern Ireland rural)

Post

Attitudes to sending / receiving post

Proportion of respondents agreeing with each statement(%)

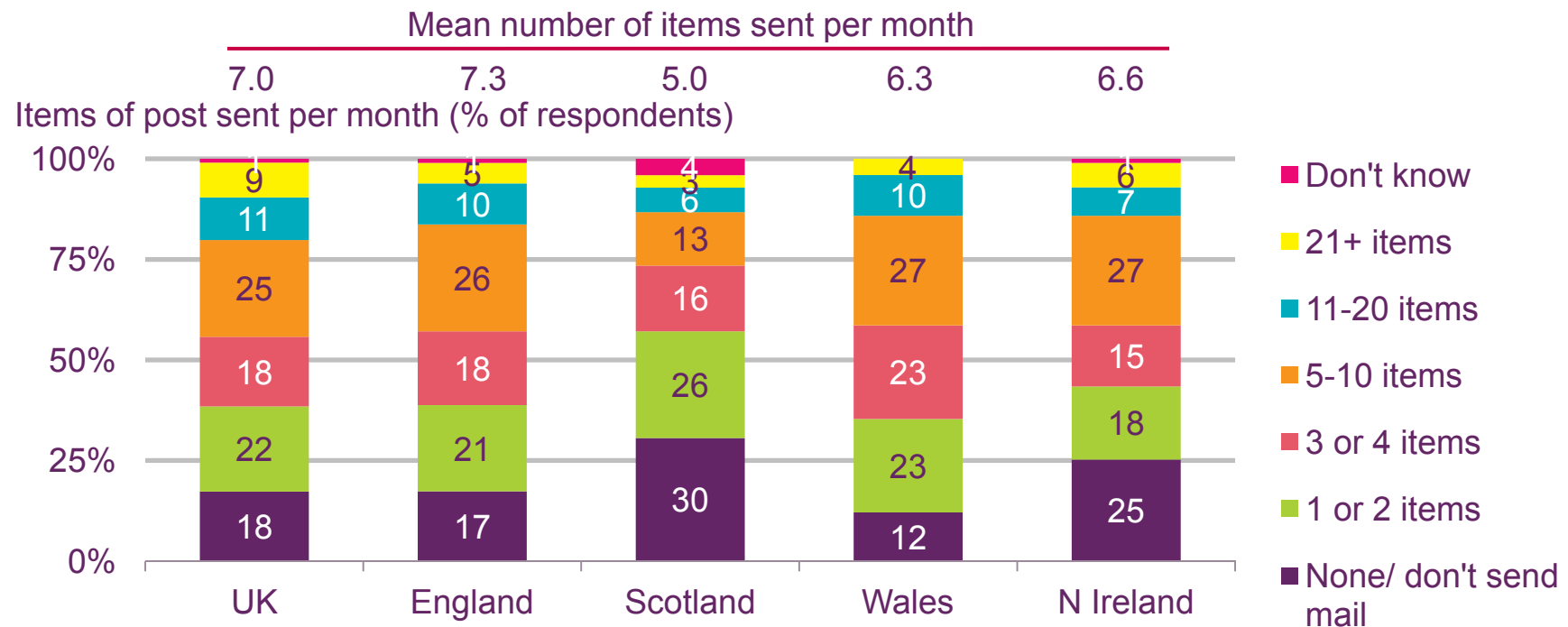


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 697 Northern Ireland)

QH2A-H. SHOWCARD - AGREEMENT WITH STATEMENTS ABOUT SENDING/ RECEIVING POST

Approximate number of items of post sent in the past month



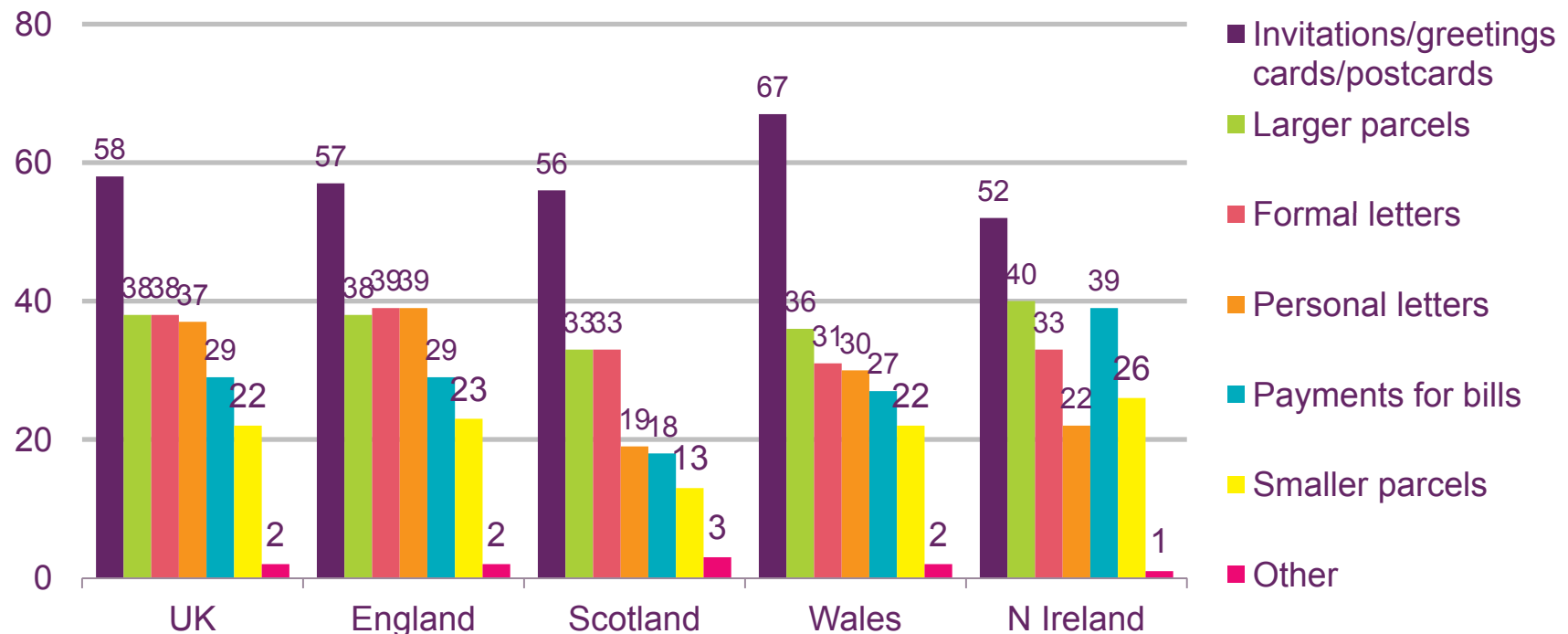
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)

QC1. Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Type of post sent in the past month

Proportion of consumers (%)

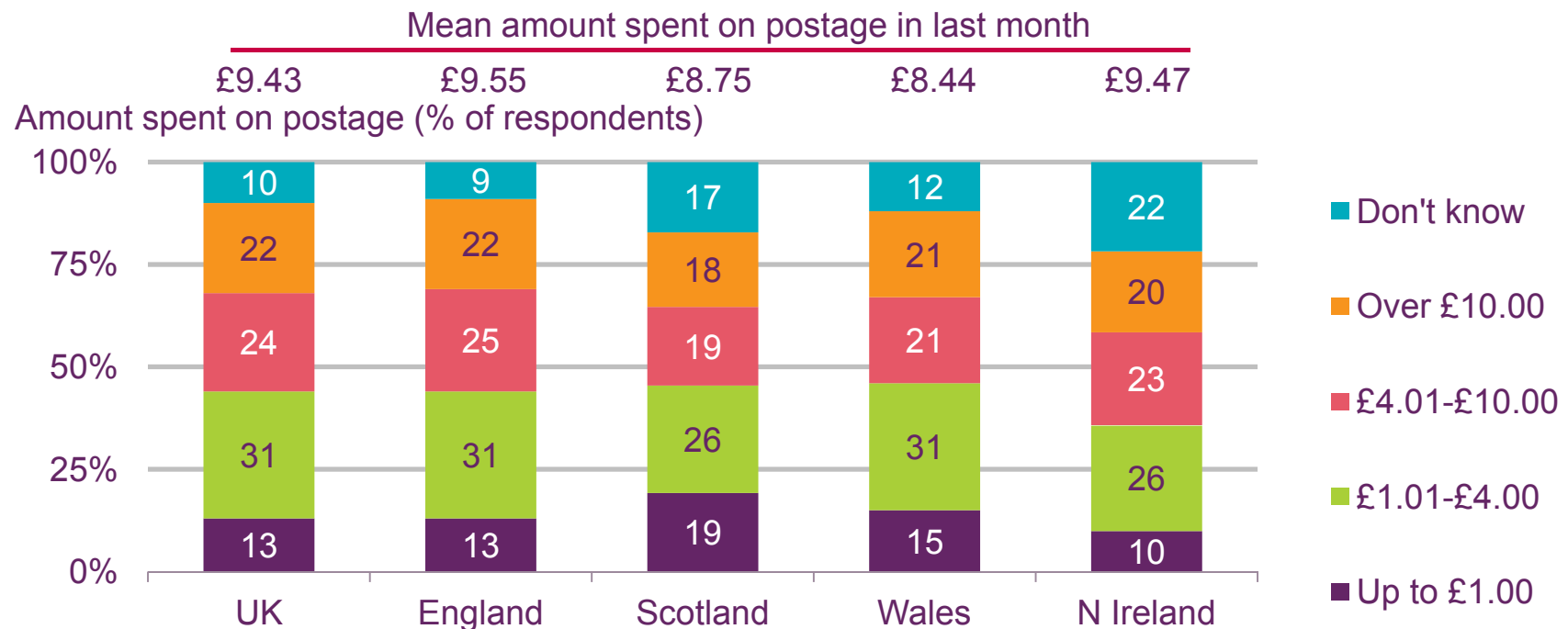


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All adults aged 16+ (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)

QC5. Which of these types of mail would you say you have personally sent in the last month by post?
(MULTICODE)

Approximate spend on postage for items sent in past month



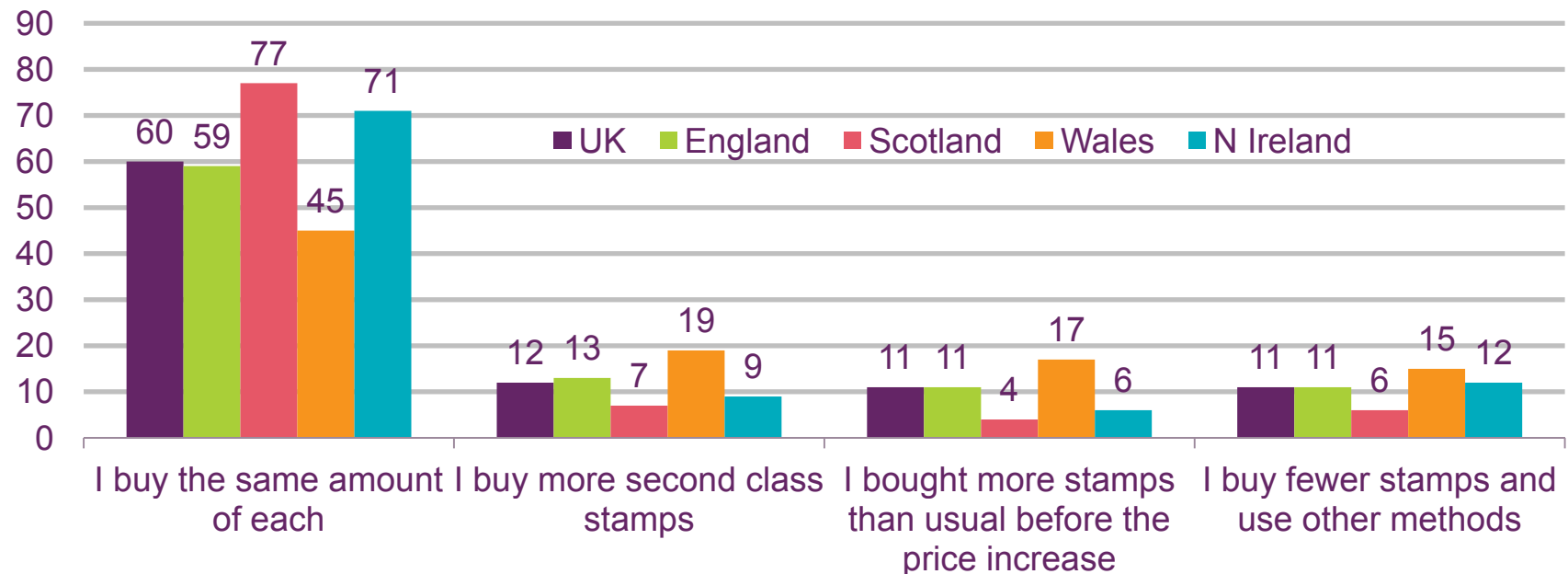
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All who have personally sent any items of post in the last week (n = 3889 UK, 2267 England, 595 Scotland, 503 Wales, 524 Northern Ireland)

QC4. Approximately how much did you spend on the postage used for the items that you sent in the last month – including letters, cards and parcels?

Impact of price increase on purchase of First and Second Class stamps

Proportion of consumers (%)



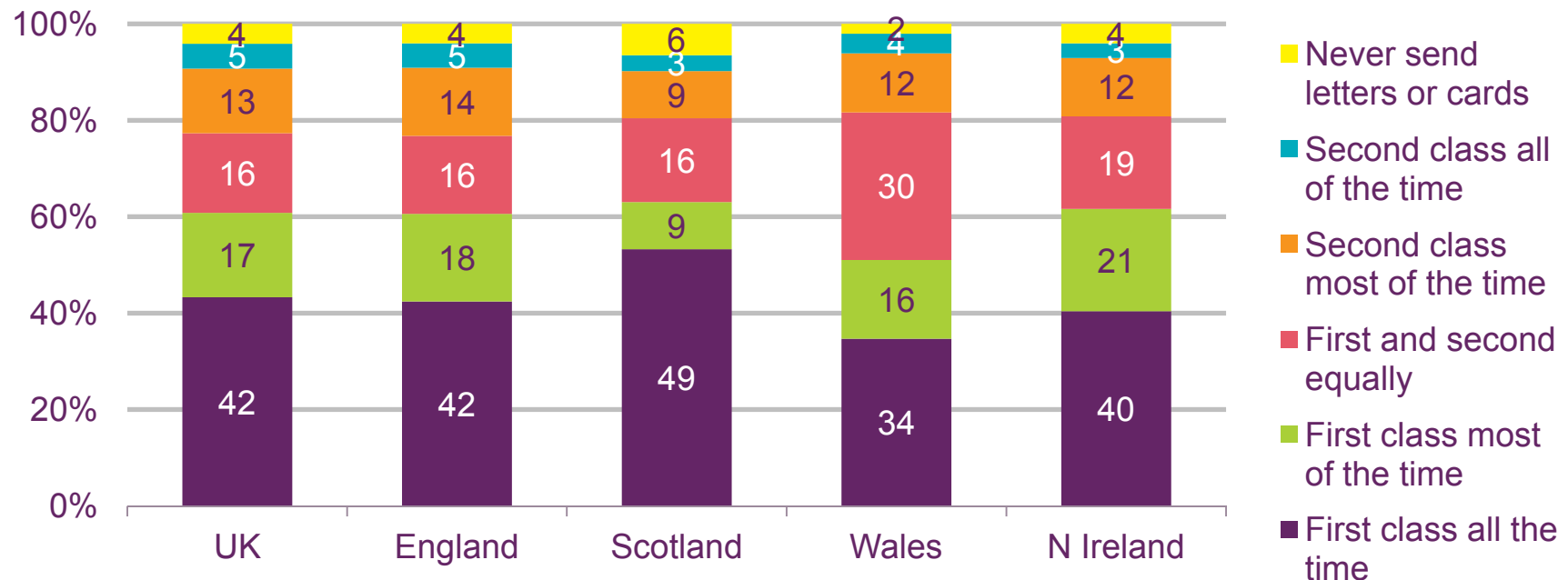
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)

QF8. As you may know, the price of first and second class postage increased on 30th April 2012. Which of these statements best describes the impact, if any, of the price rise on the stamps you have bought since then? MULTICODE

Services used to send items of post

Proportion of respondents (%)

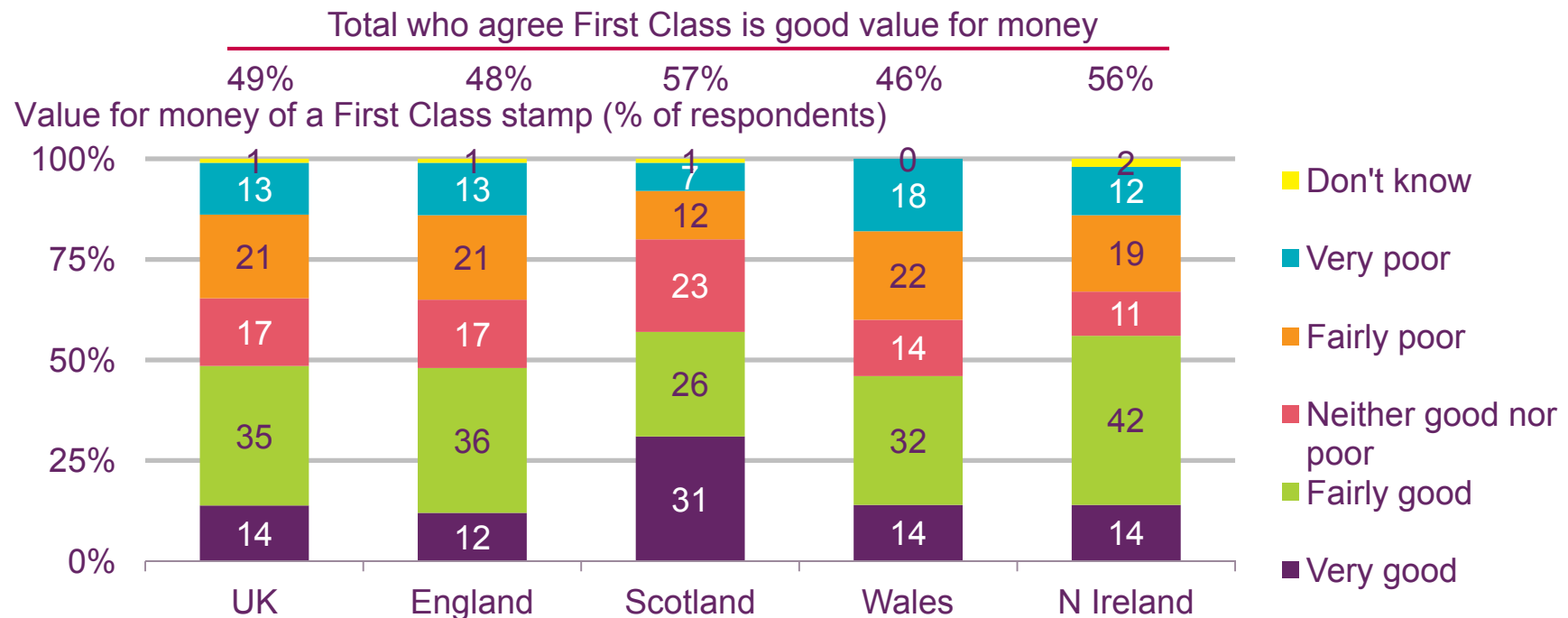


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)

QF6. When sending letters or cards, which service do you use?

Value for money of sending post using a First Class stamp

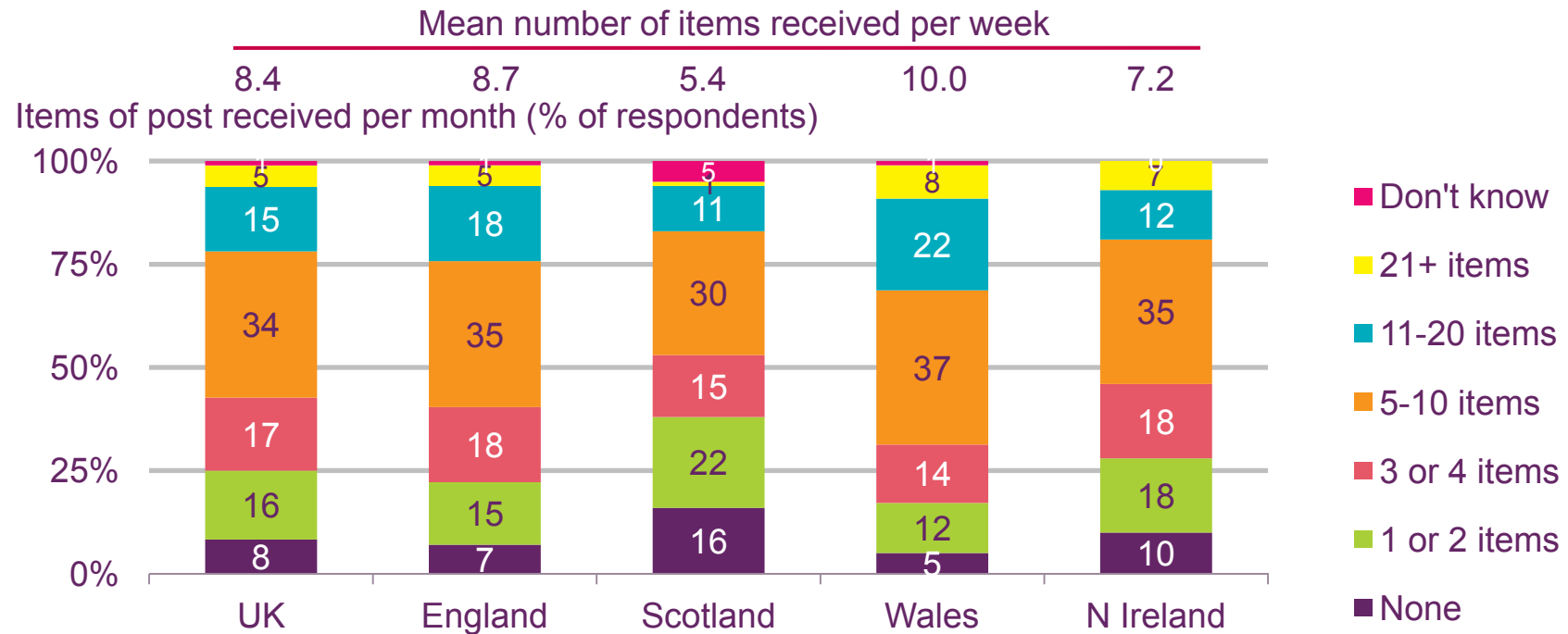


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)

QF3. It currently costs 60p to send a standard letter first class within the UK. How would you rate the Royal Mail's first class service in terms of value for money

Approximate number of items of post received in past week



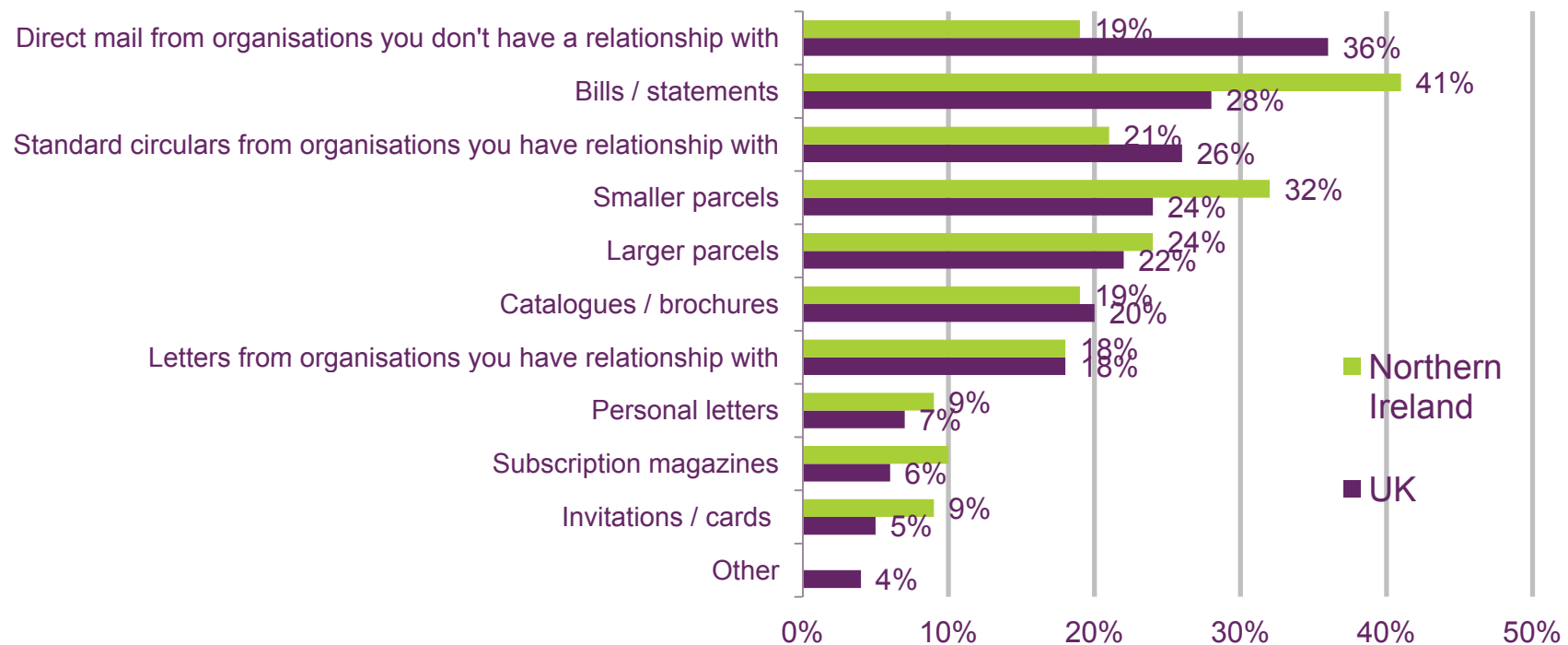
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All adults aged 16+ (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland)

QD1. Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week?

Type of items people are receiving more often now

Proportion of respondents (%)

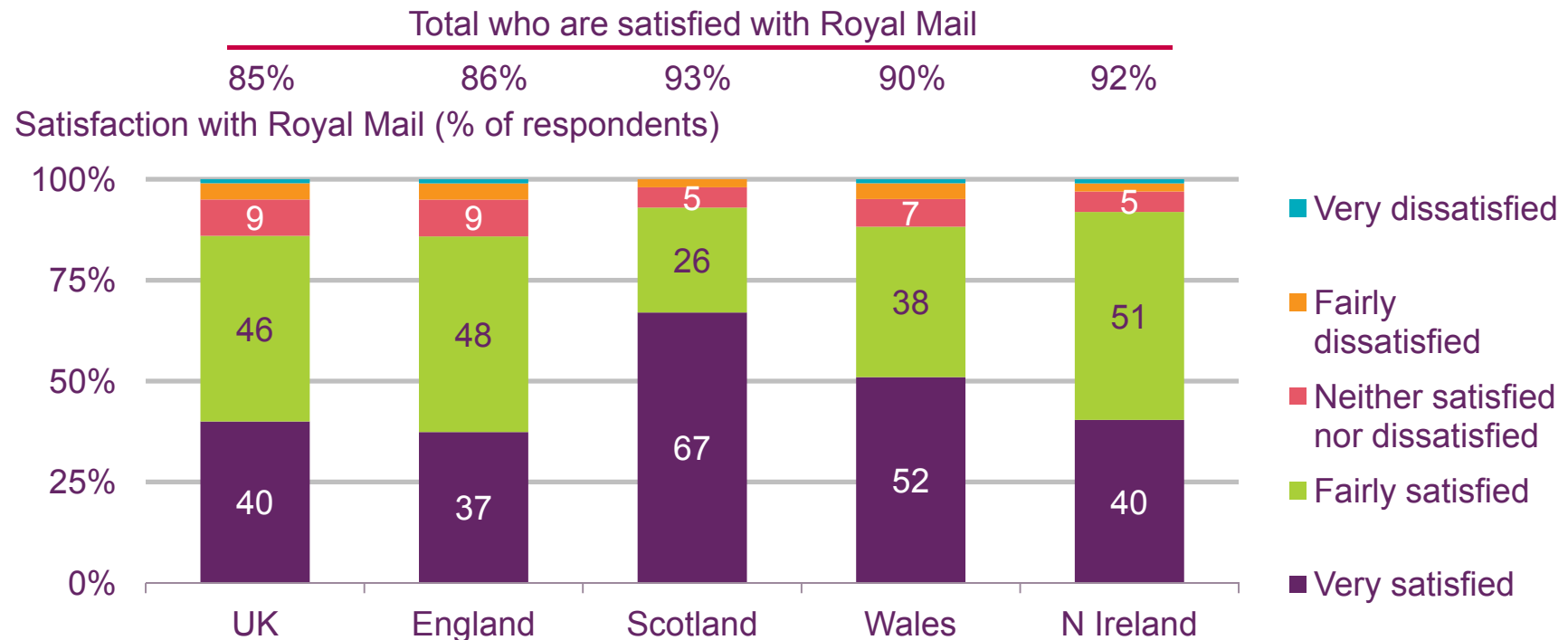


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All who say the number of items received by post has increased compared to two years ago (n = 1181 UK, 173 Northern Ireland)

QD6. Which of these types of addressed items are you personally receiving more often through the post now?

Overall satisfaction with Royal Mail



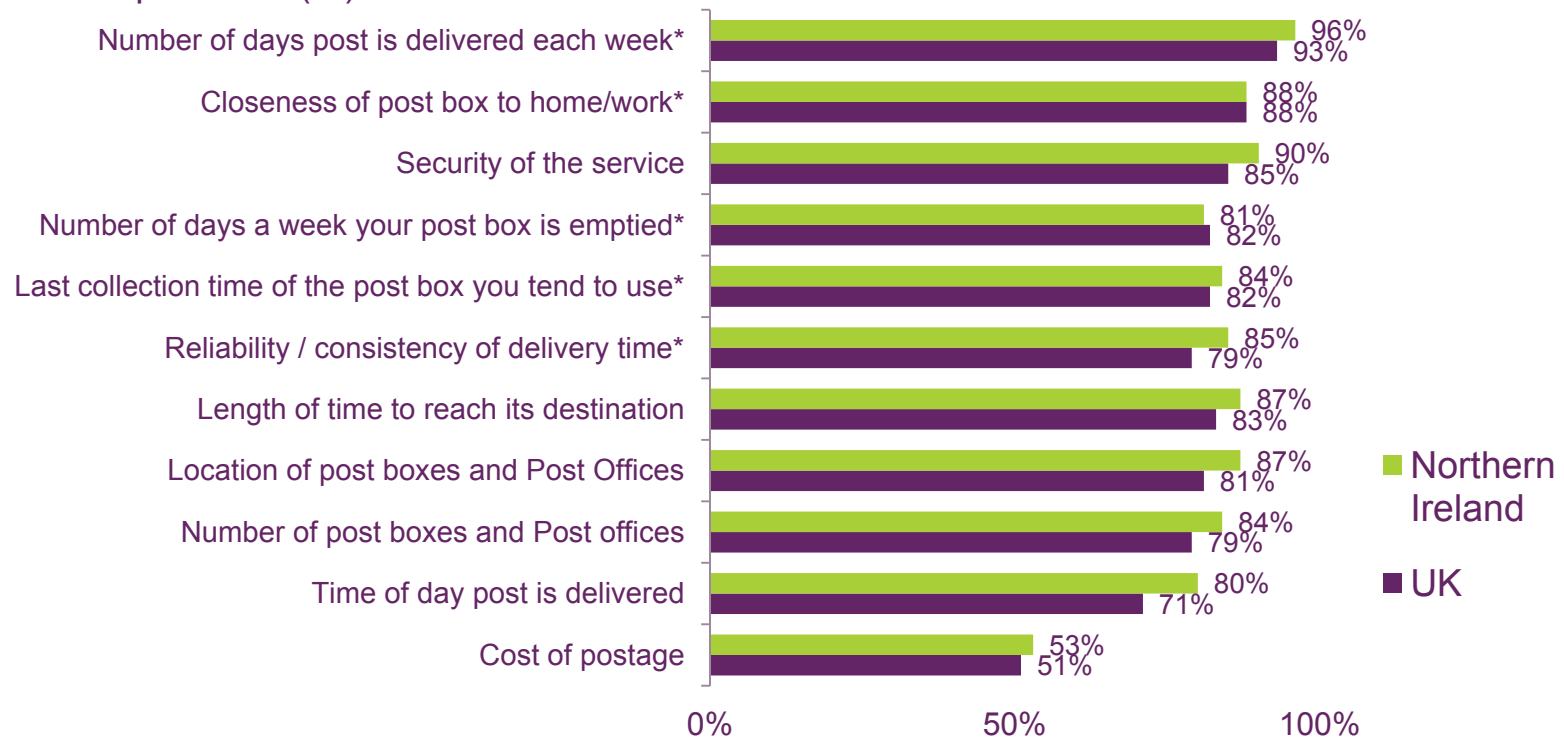
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents from Q1 2013 (n = 2397 UK, 1380 England, 402 Scotland, 286 Wales, 329 Northern Ireland)

QE5. How would you rate your overall satisfaction with Royal Mail?

Satisfaction with specific aspects of Royal Mail's service

Proportion of respondents (%)



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

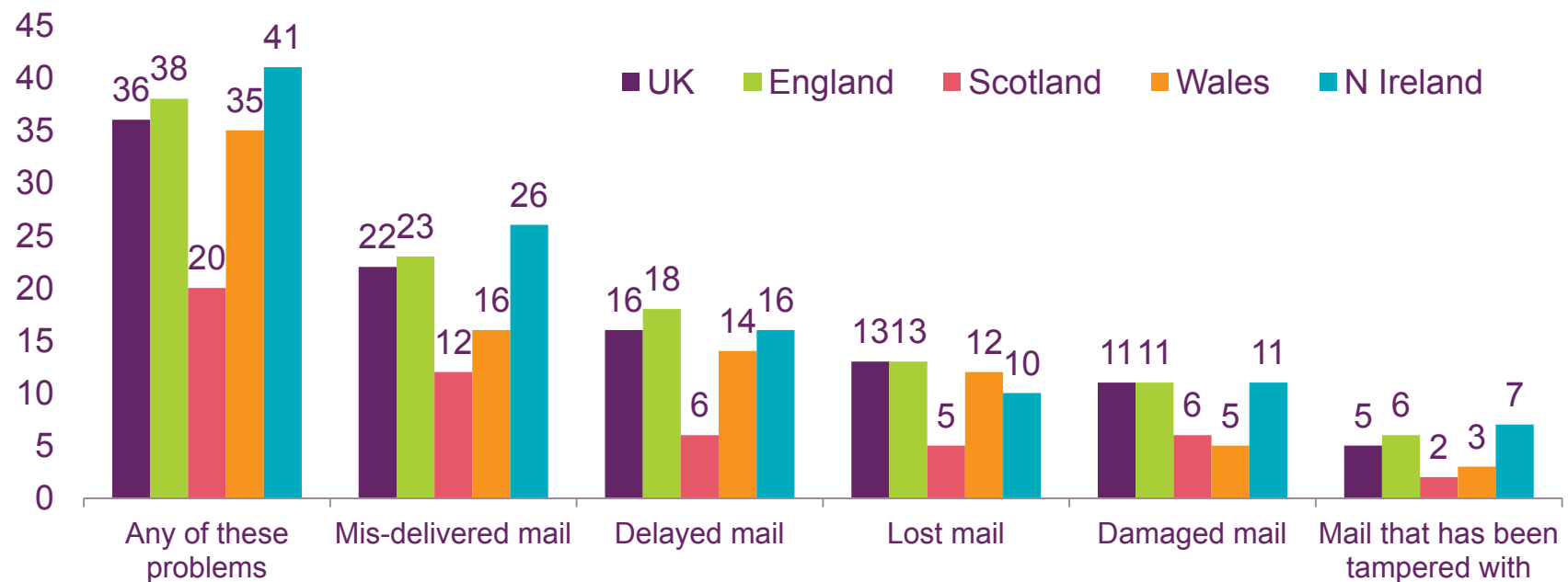
Base: All respondents (n = 4844 UK, 697 N Ireland)

QE3A-K. SHOWCARD - SATISFACTION WITH ASPECTS OF ROYAL MAIL'S SERVICE

*Base: All respondents (from Q1 2013) (n = 2397 UK, 329 N Ireland)

Problems experienced with Royal Mail in past 12 months

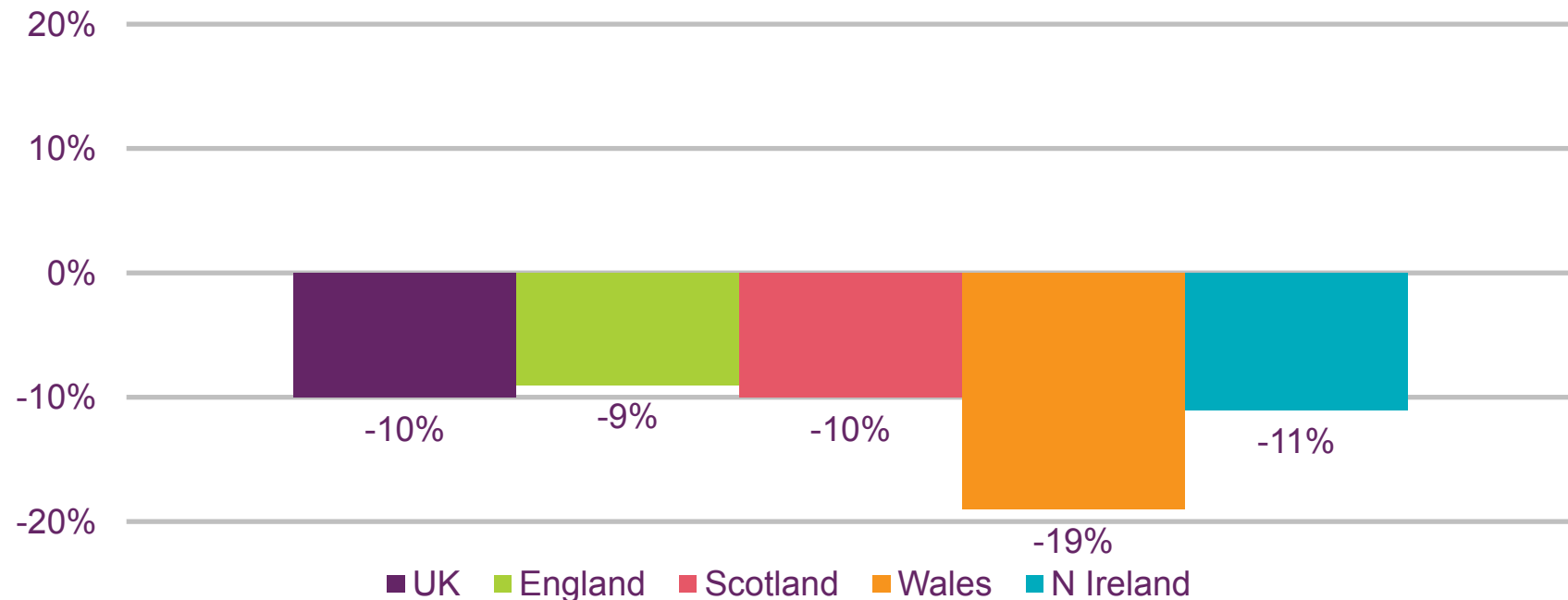
Proportion of consumers (%)



Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 Northern Ireland) QG1A-E. Experience of problems with Royal Mail service in the last 12 months

Net claimed changes in the amount of post sent in the last two years



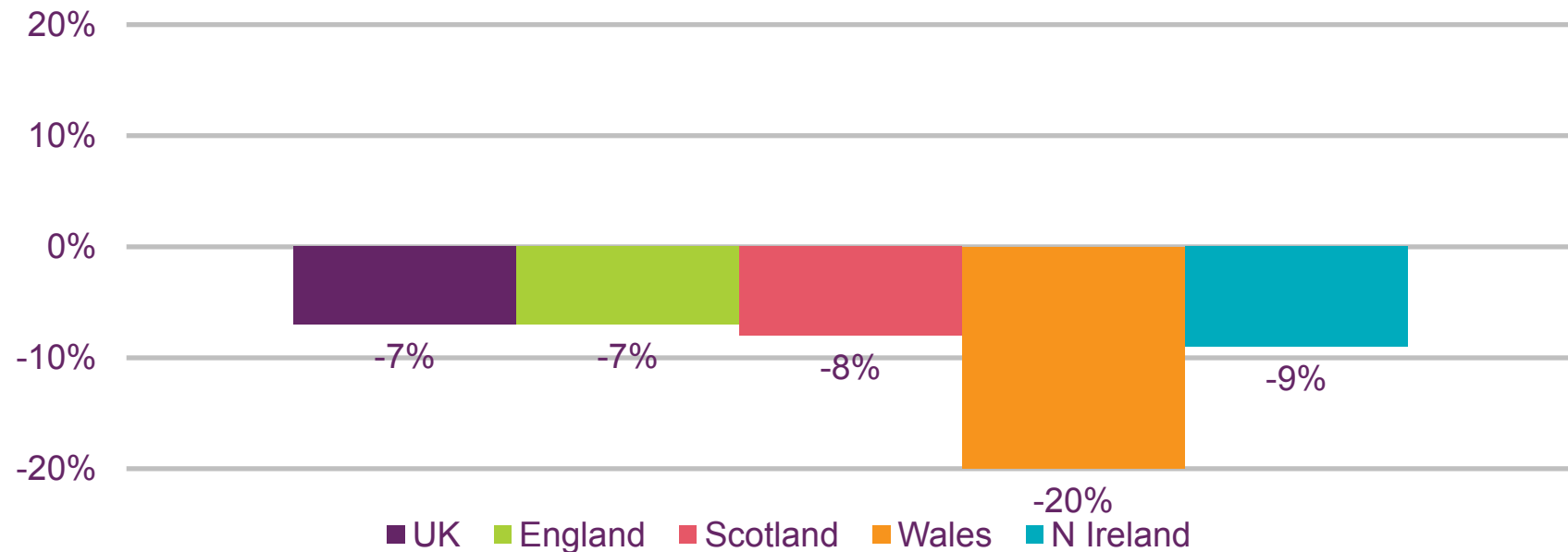
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 N Ireland)

QC10: Compared with two years ago, would you say that the number of items you send through the post has...increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?

Note: chart shows net percentage (% who claim their use has increased - % those who claim their use has decreased)

Net predicted change in the amount of post sent in the next two years



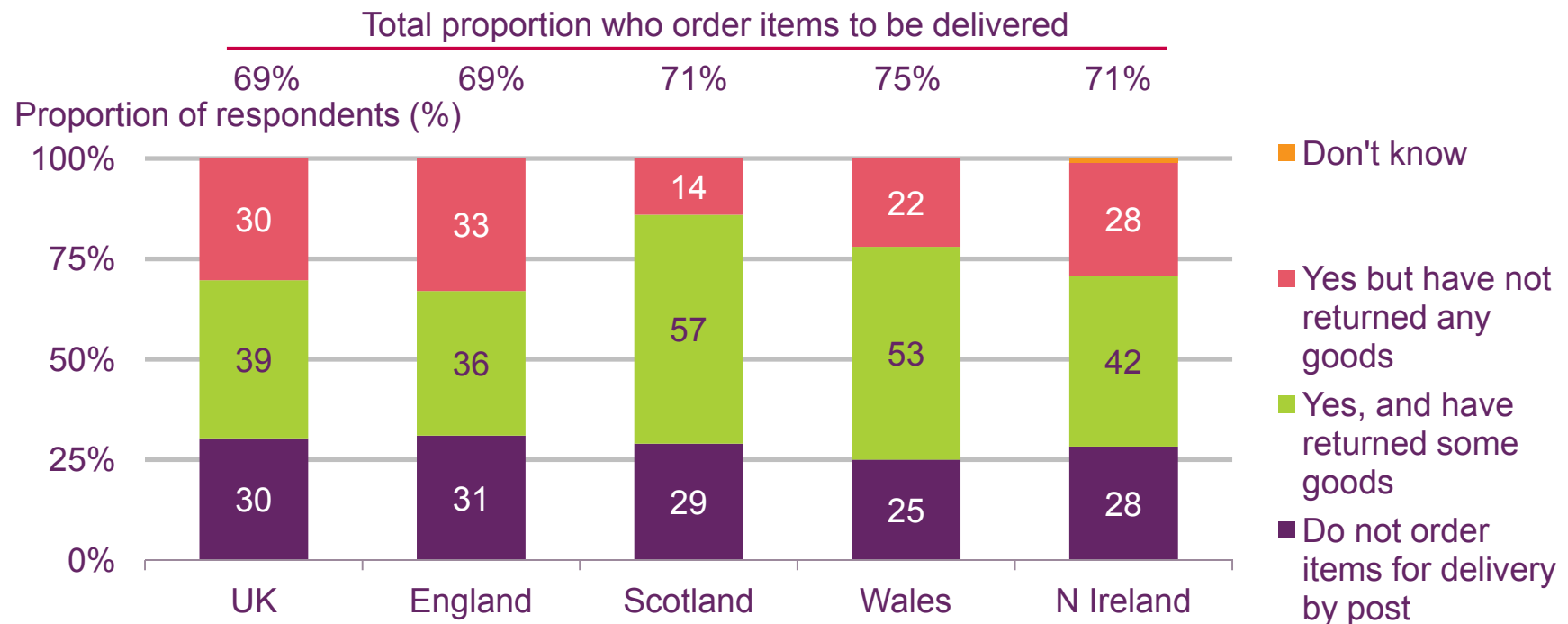
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 N Ireland)

QC16: Looking to the future... Compared with now, would you say that the number of letters, cards and parcels you will be sending in the post two years from now will have.....increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?

Note: chart shows net percentage (% who claim their use will increase - % those who claim their use will decrease)

Proportion of consumers who have ordered items to be delivered through the post



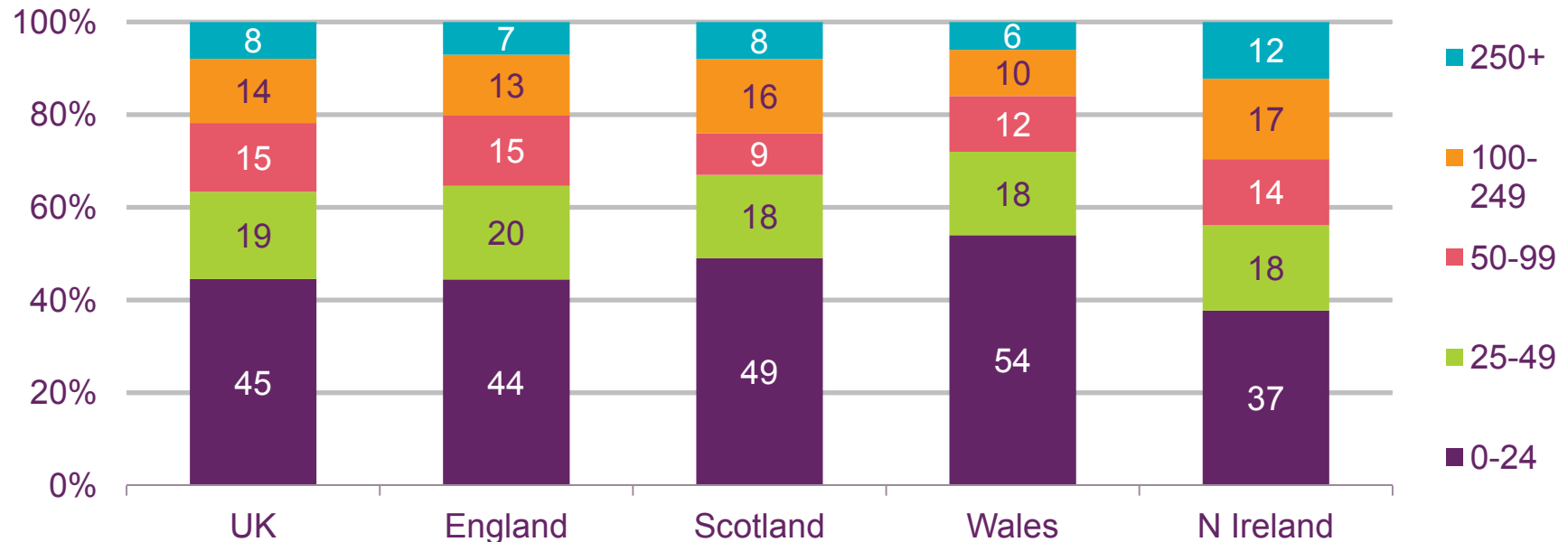
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England, 811 Scotland, 547 Wales, 697 N Ireland)

QD8. Do you ever order items to be delivered to you through the post? IF YES Have you ever had to return any goods you bought which were delivered to you by post?

Average volume of letters sent each month

Proportion of respondents (%)



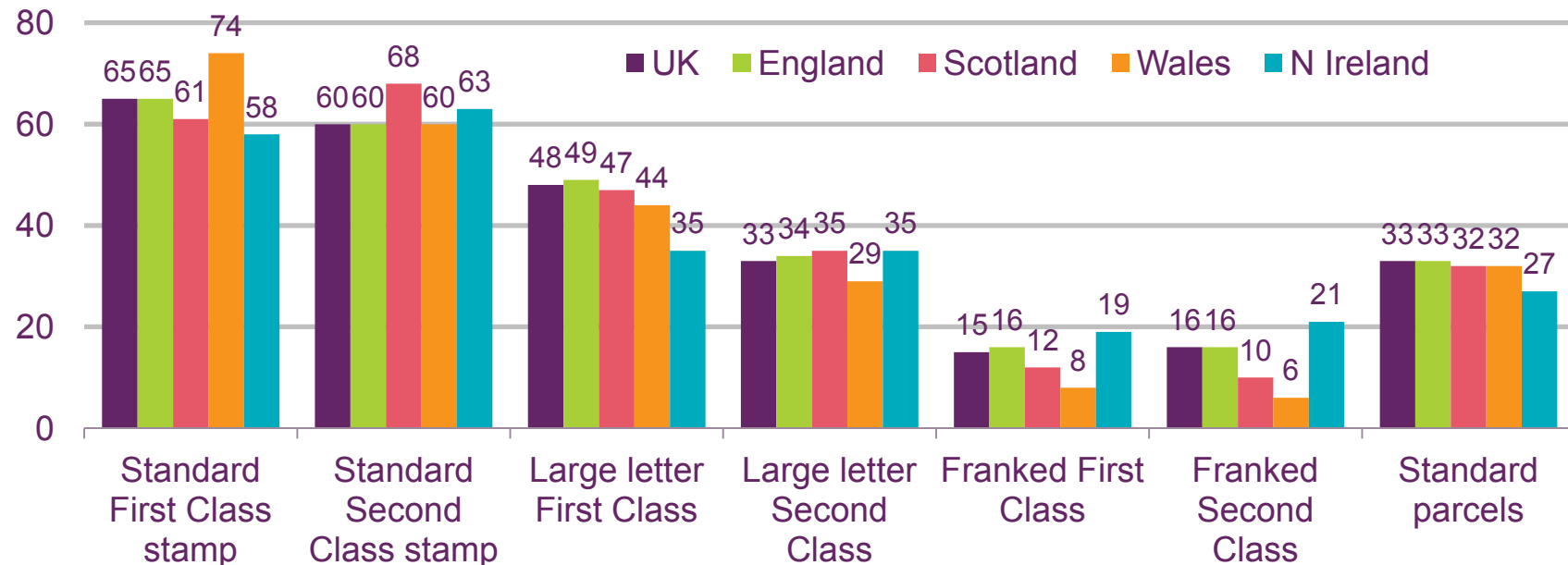
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base : All respondents (n = 1604 UK, 1023 England, 214 Scotland, 193 Wales, 174 N Ireland)

QV2a. On average, how many letter items does your organisation send per month? Please think ONLY about all the letters and large letters you may send as an organisation.

Royal Mail services used for sending letters

Proportion of consumers (%)



Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base : All respondents using RM standard delivery services (n = 1460 UK, 934 England, 197 Scotland, 168 Wales, 161 N Ireland)

QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

Monthly spend on sending postal items

Monthly spend (% of respondents)



Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

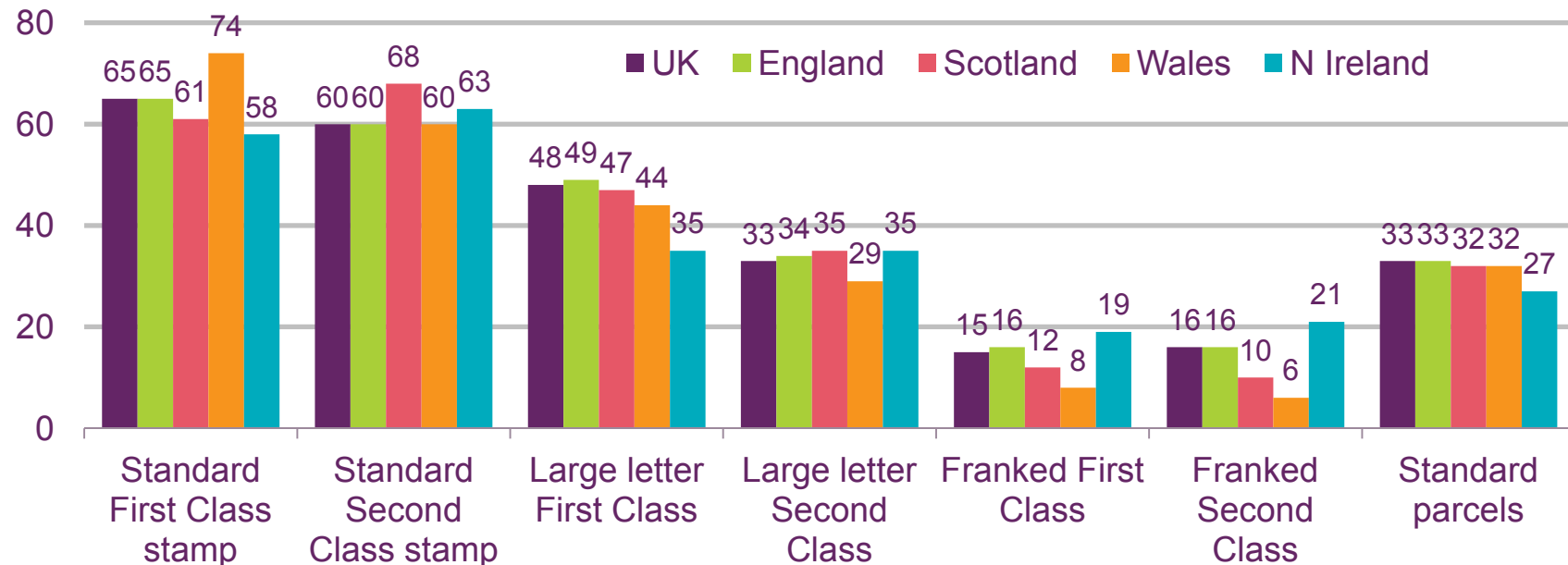
Base : All respondents (n = 1604 UK, 1023 England, 214 Scotland, 193 Wales, 174 N Ireland)

QV1. On average, how much money does your organisation spend per month on sending mail items?

Please think about all the letters, packets and parcels you may send as an organisation.

Royal Mail services used to send letters

Proportion of consumers (%)

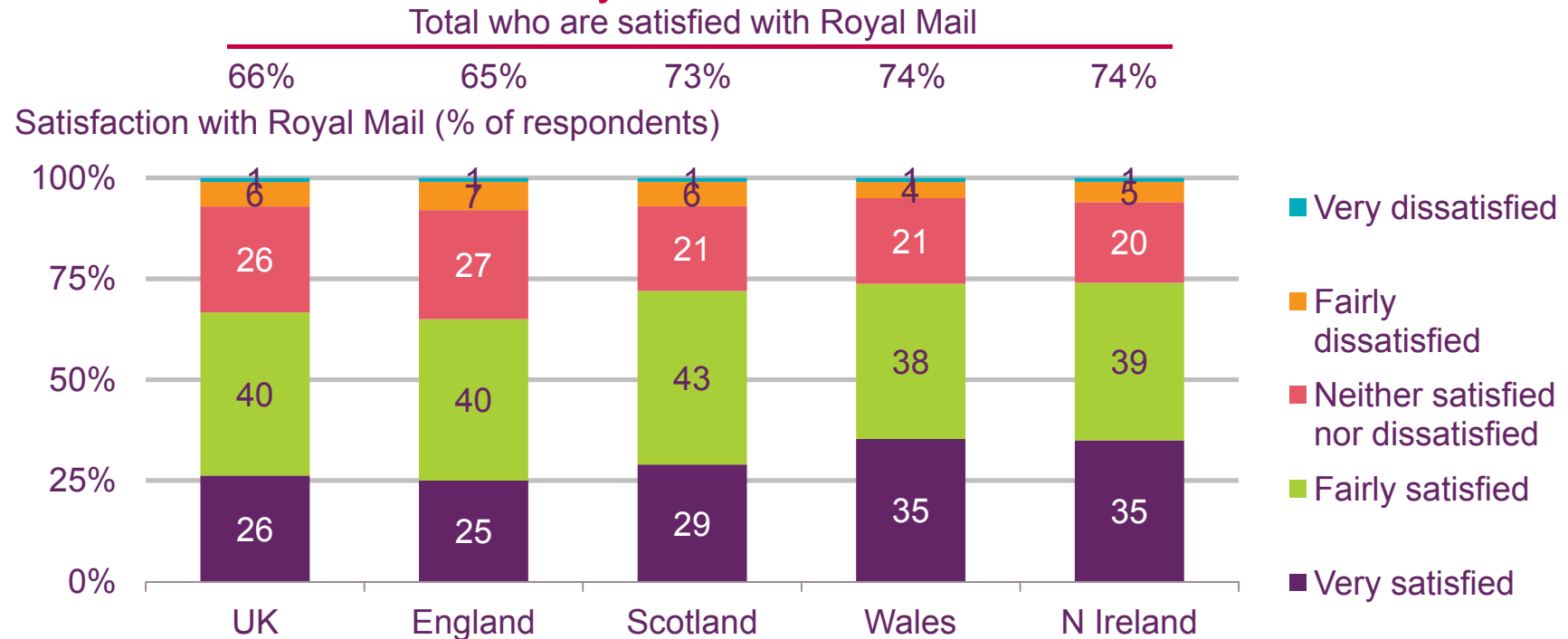


Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base : All respondents using RM standard delivery services (n = 1460 UK, 934 England, 197 Scotland, 168 Wales, 161 N Ireland)

QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

Overall satisfaction with Royal Mail



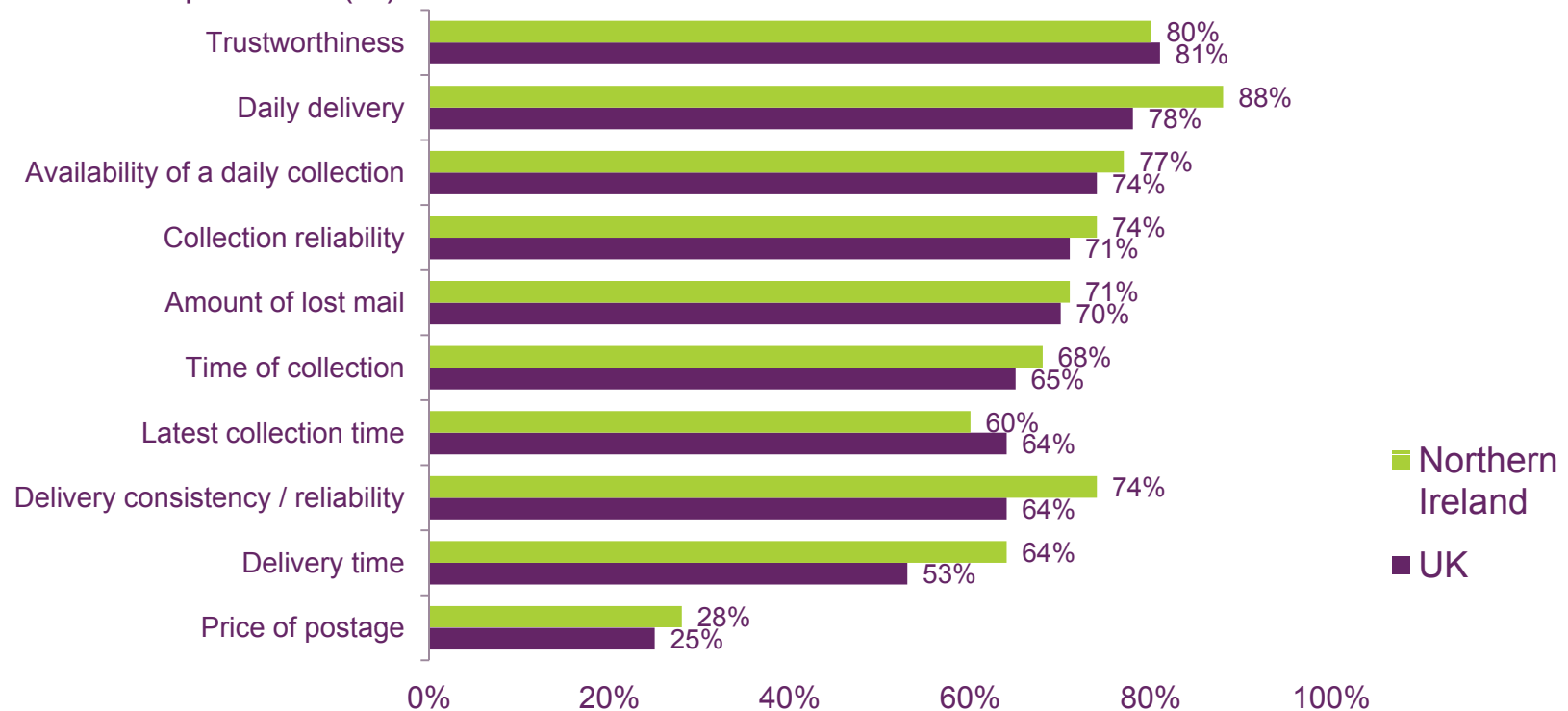
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base: All respondents who use Royal Mail (n = 1566 UK, 988 England, 209 Scotland, 188 Wales, 171 Northern Ireland)

QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

Satisfaction with specific aspects of Royal Mail's service

Proportion of respondents (%)



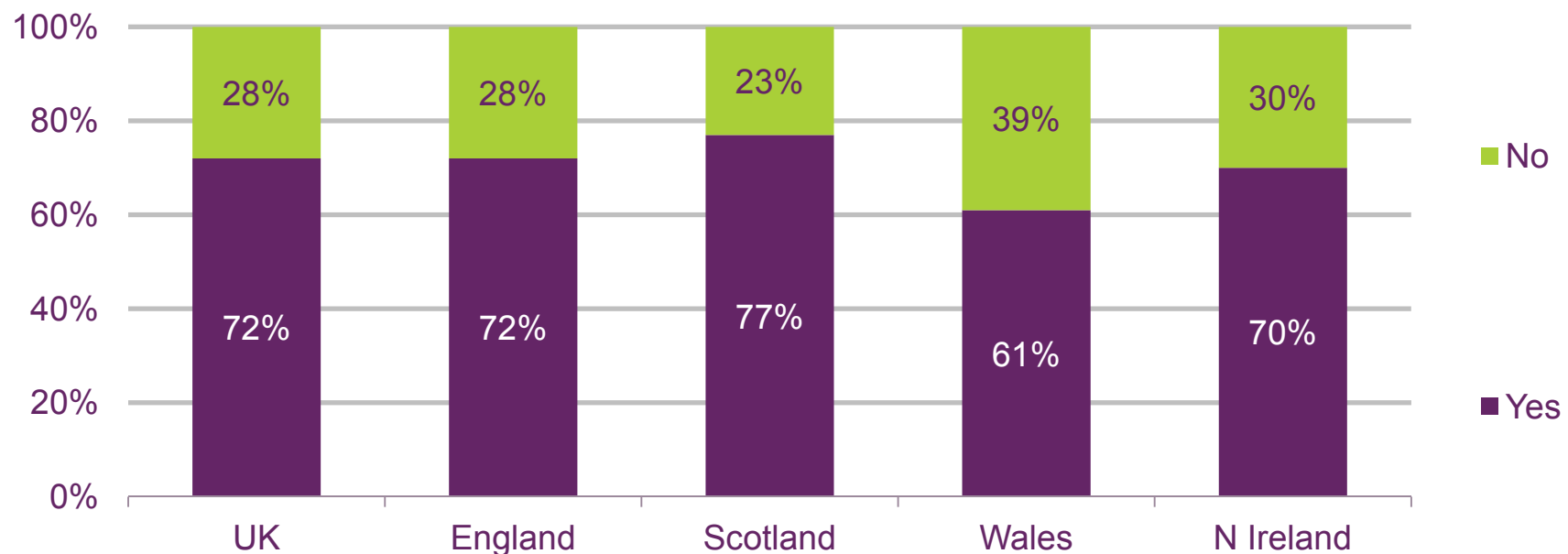
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base: All respondents who use Royal Mail (n = 1566 UK, 171 Northern Ireland)

QRM3: How would you rate the performance of Royal Mail, as a recipient and sender, in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?

Amount of businesses switching to other forms of communication over the past year

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker, Q3 2012-Q1 2013

Base: All respondents (n = 1218 UK, 804 England, 144 Scotland, 134 Wales, 136 N Ireland)

QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?