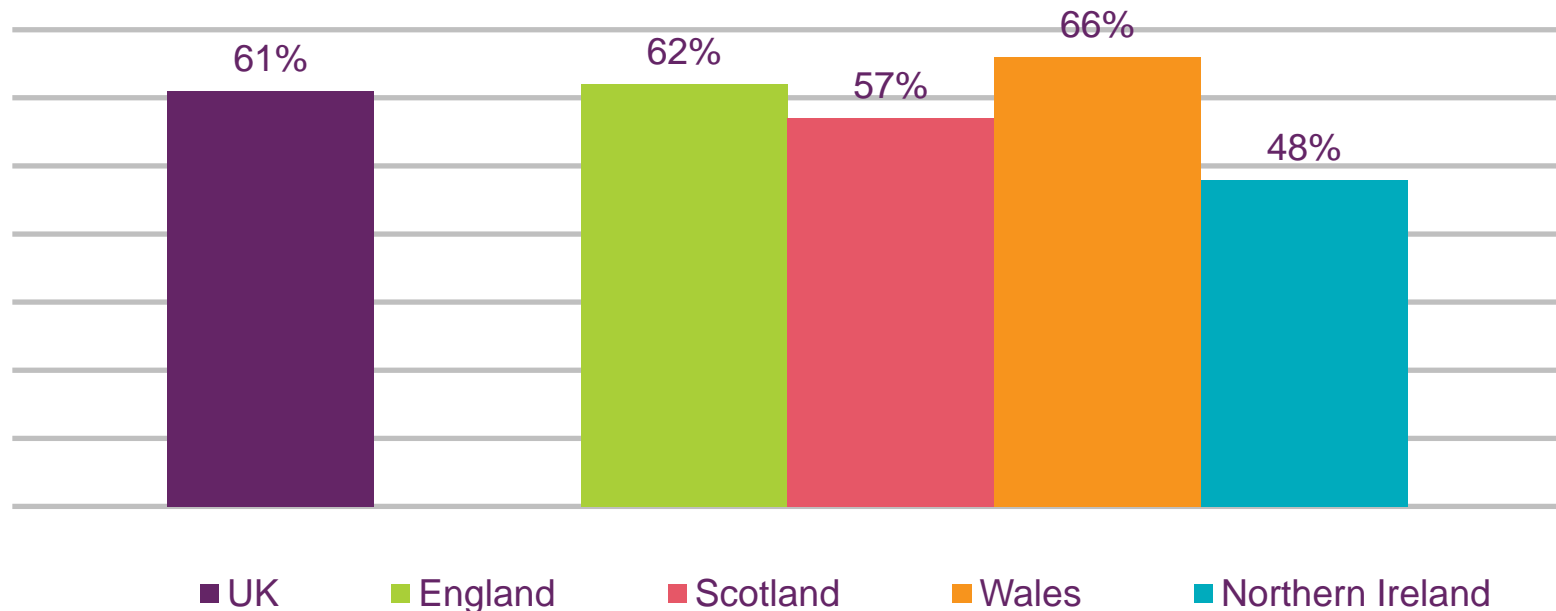


# Northern Ireland's communications market

## Figure 1.2 Proportion ‘ever’ using online government services, by nation

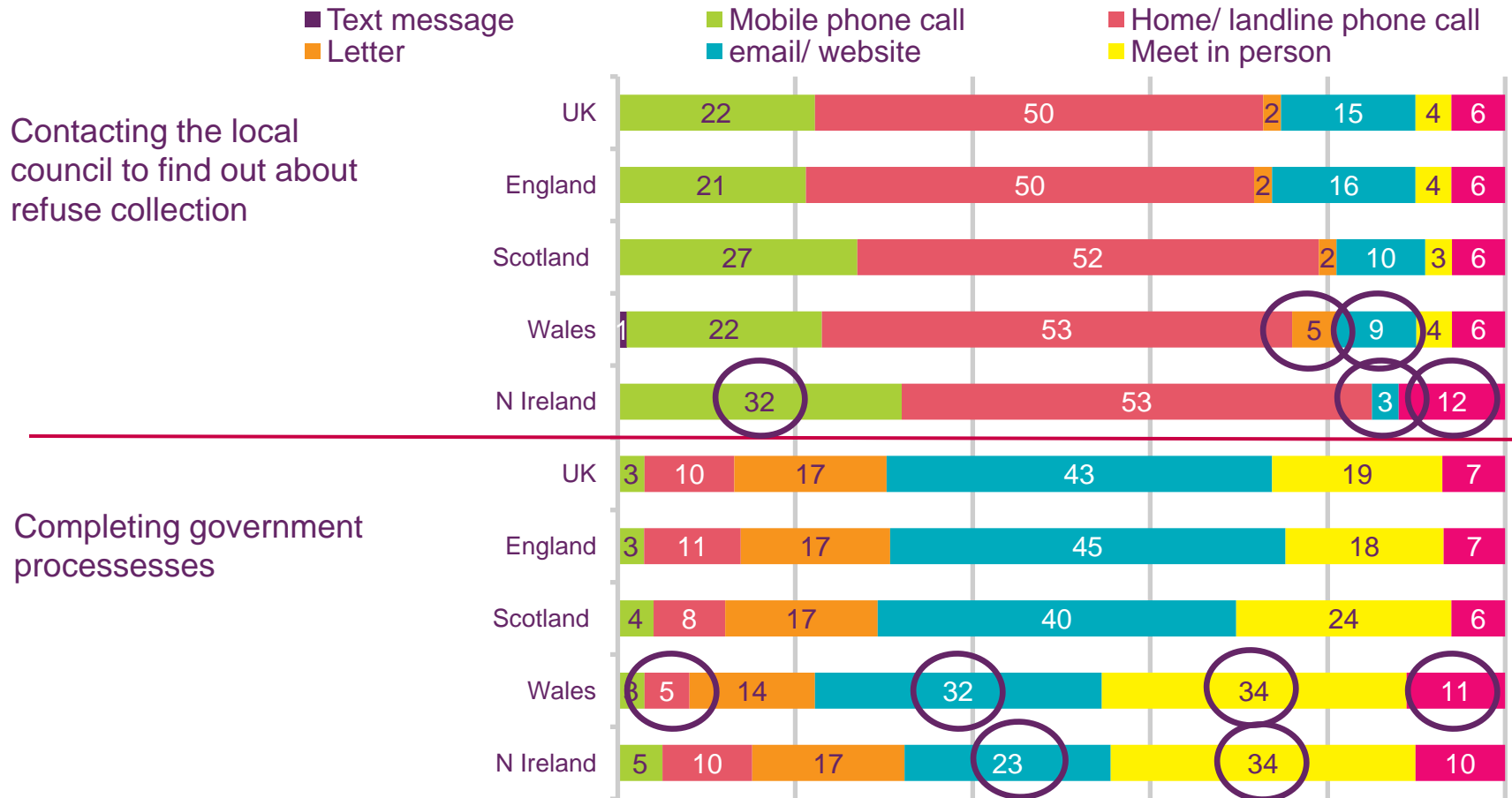
% That use services



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.)

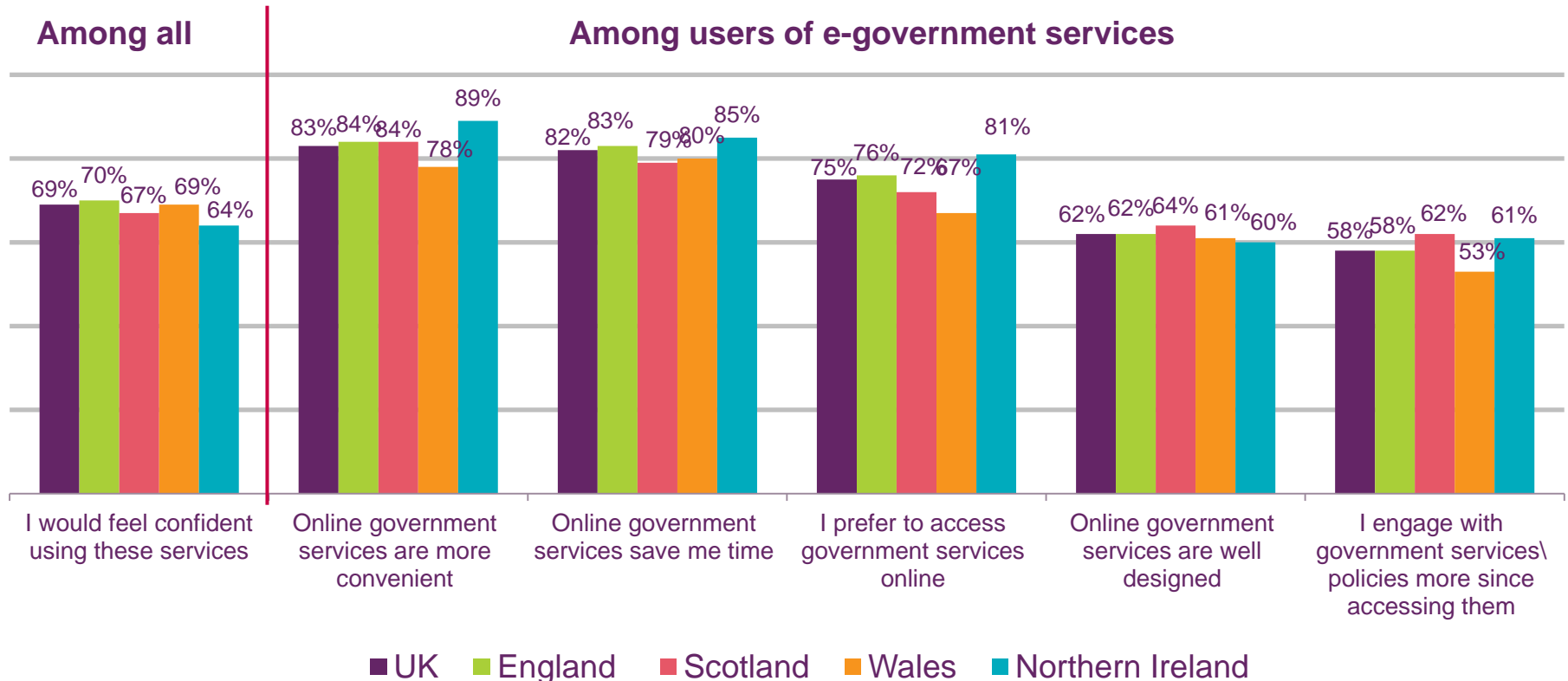
# Figure 1.3 Preferred method of contact with local council, and for government processes, by nation



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)

# Figure 1.4 Attitude towards online government services, by nation

% Agree strongly or slightly



Source: Kantar Media Omnibus

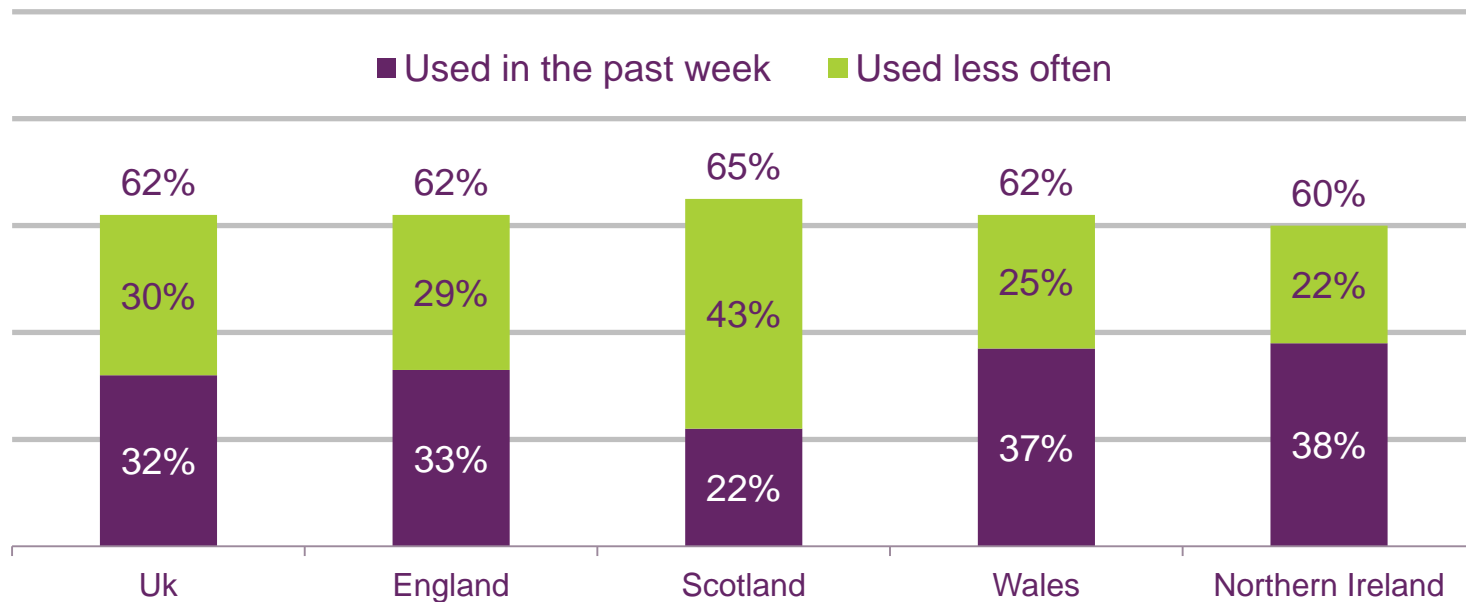
Base: All with internet access: UK (N=2271), England (N=1325), Scotland (N=399), Wales (N=297), Northern Ireland (N=250).

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.

## Figure 1.5 Proportion of internet users shopping online, by nation

%

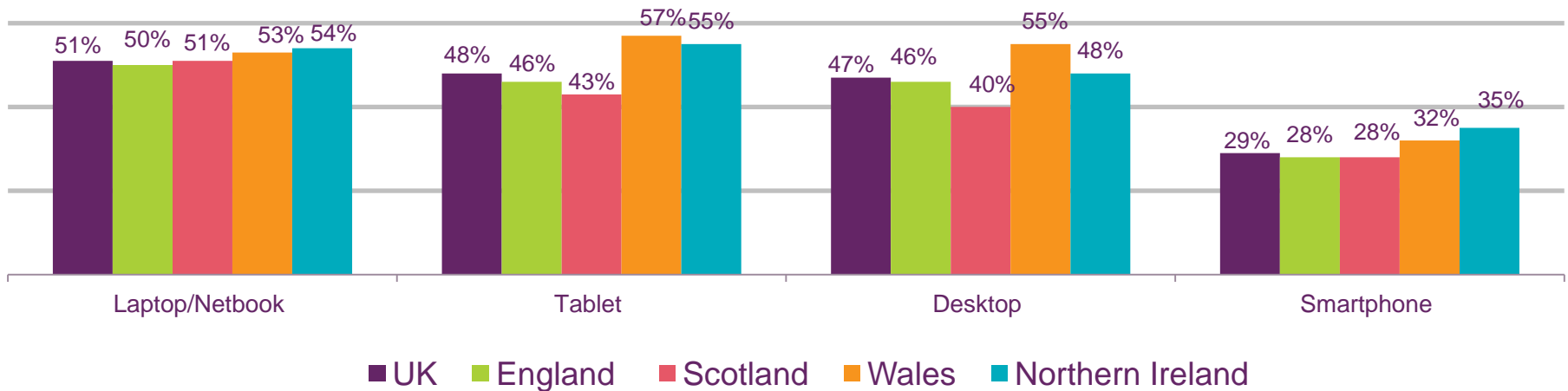


Source: Ofcom technology tracker research, Quarter 1 2013

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.

# Figure 1.6 Proportion of people shopping online through devices, by nation

## Among owners of each device

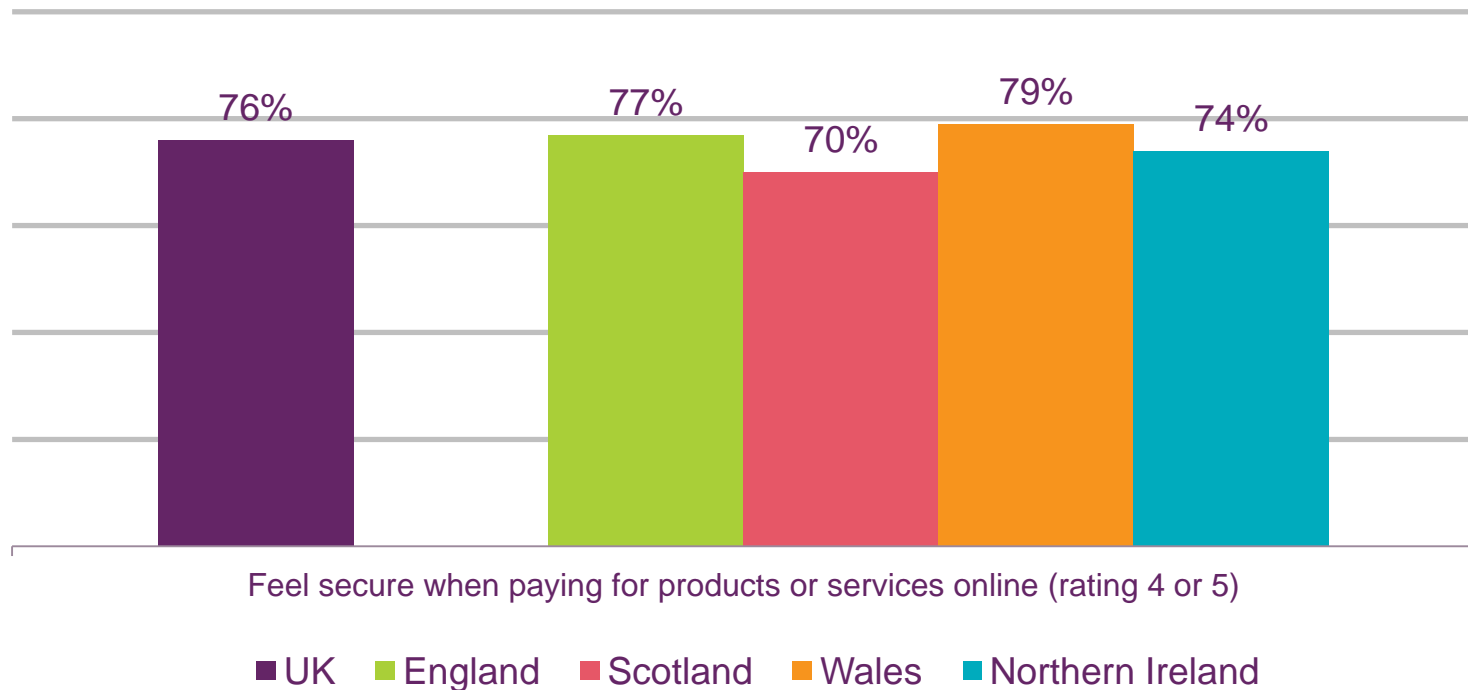


Source: Kantar Media Omnibus

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?

## Figure 1.7 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 form 1-5, where 1 means not at all secure and 5 means very secure.

# Figure 1.8 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



## Figure 1.9 Confidence in delivery when shopping online, by nation

% Feel confident

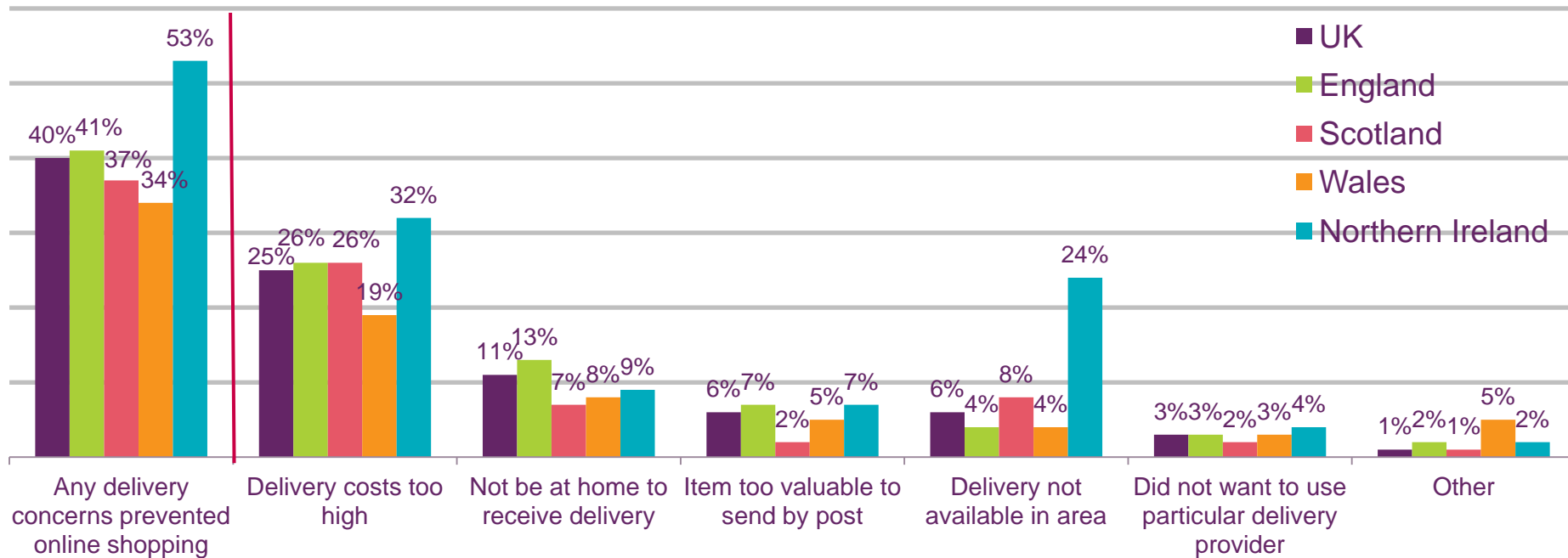


Source: Kantar Media Omnibus

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 form 1-5, where 1 means not at all confident and 5 means very confident.

# Figure 1.10 Delivery concerns preventing online purchasing, by nation

% mentioned each reason

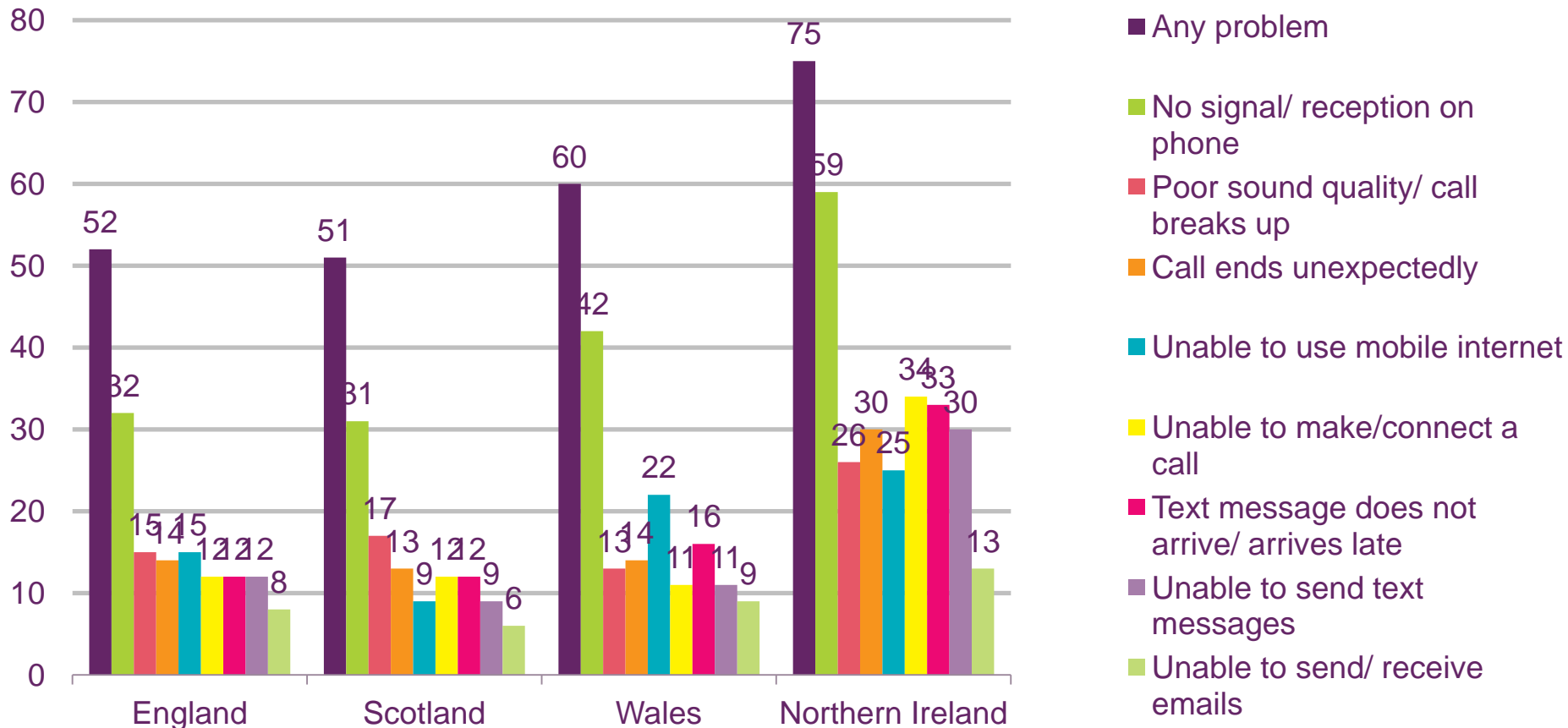


Source: Kantar Media Omnibus

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?

# Figure 1.11

## 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?

# Figure 1.12



## 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
	<b>S-I</b>	-7	-4	-7	-9	-13	-6
England	Importance	82	70	81	86	79	83
	Satisfaction	76	66	74	78	67	77
	<b>S-I</b>	-6	-4	-7	-8	-12	-6
Scotland	Importance	86	71	89	90	84	88
	Satisfaction	80	66	80	82	71	80
	<b>S-I</b>	-6	-5	-9	-8	-13	-8
Wales	Importance	83	73	85	96	87	90
	Satisfaction	77	68	75	84	62	77
	<b>S-I</b>	-6	-5	-10	-12	-25	-13
Northern Ireland	Importance	92	76	91	94	93	90
	Satisfaction	72	58	77	76	70	80
	<b>S-I</b>	-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?

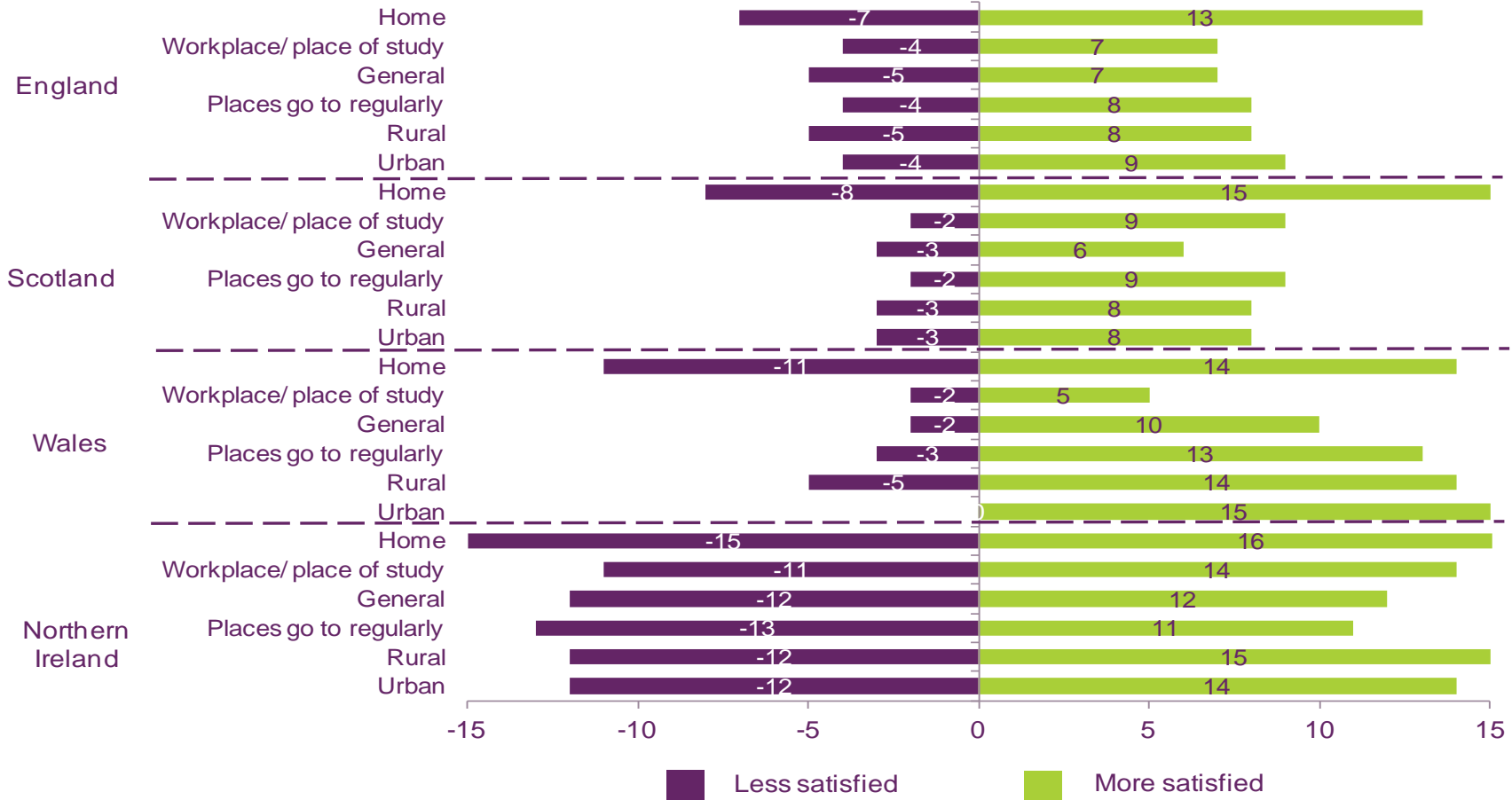
4. Q18: How satisfied do you feel with the ability to make calls in each of these locations?

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

Figure 1.13



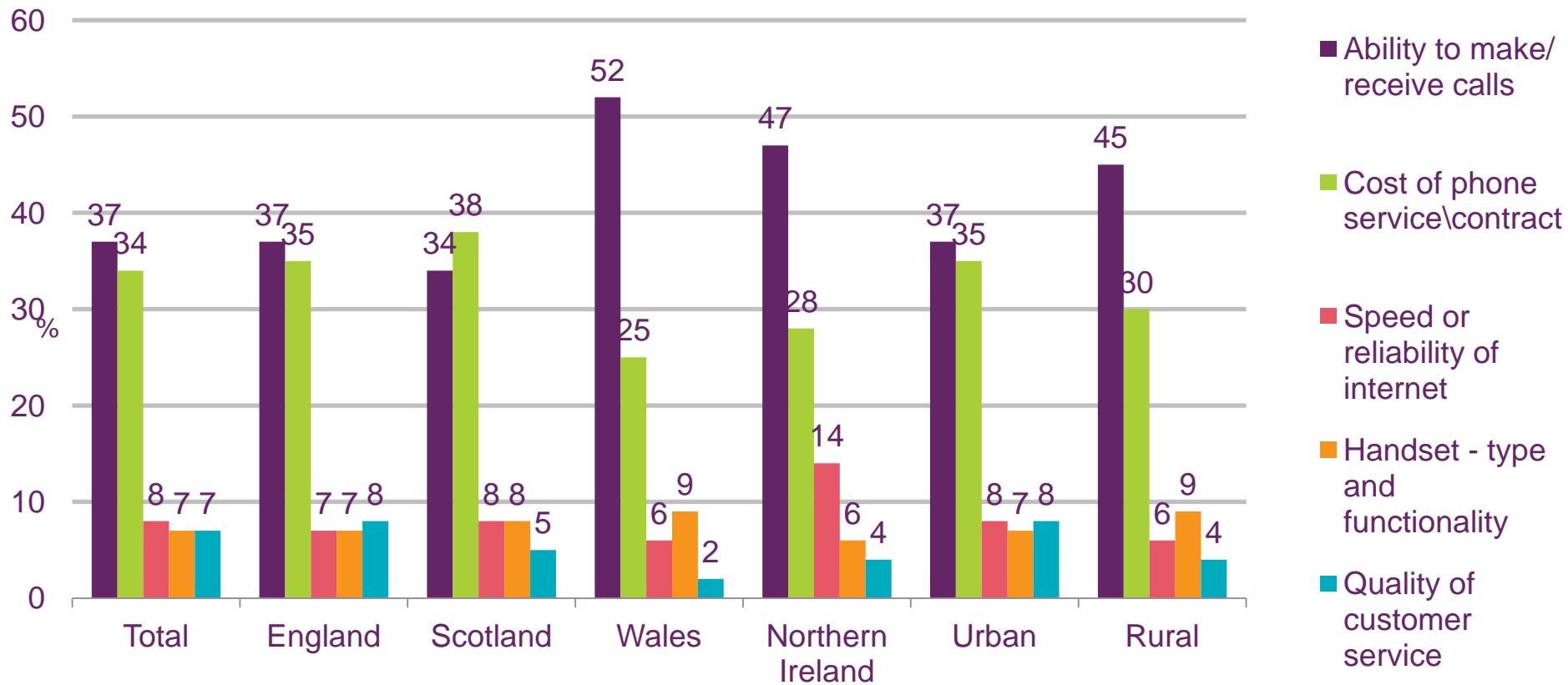
Change in levels of satisfaction with ability to make calls in different locations compared to 12 months ago, by nation



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.

# Figure 1.14

## 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.

## Figure 1.15

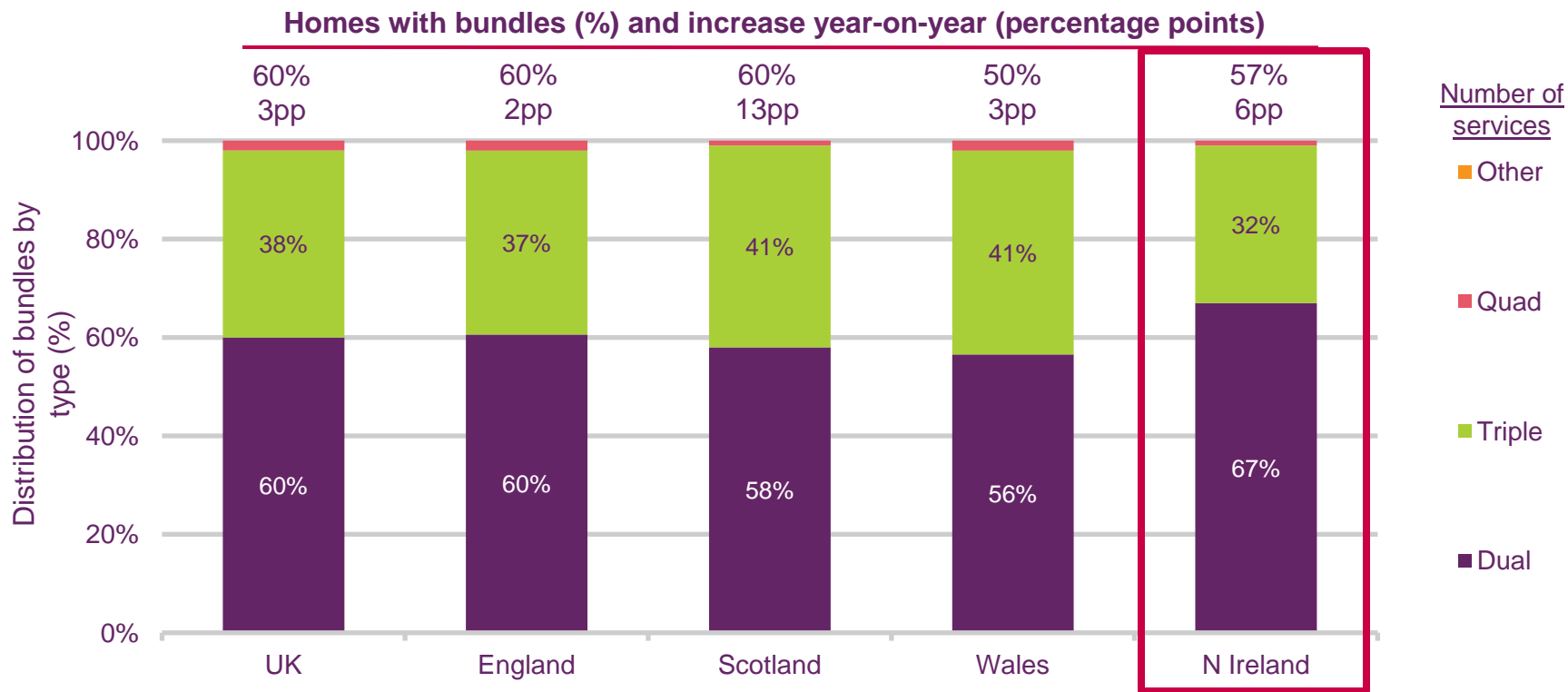
### 2G and 3G mobile coverage

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



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

# Figure 1.16 Take-up of bundle by type



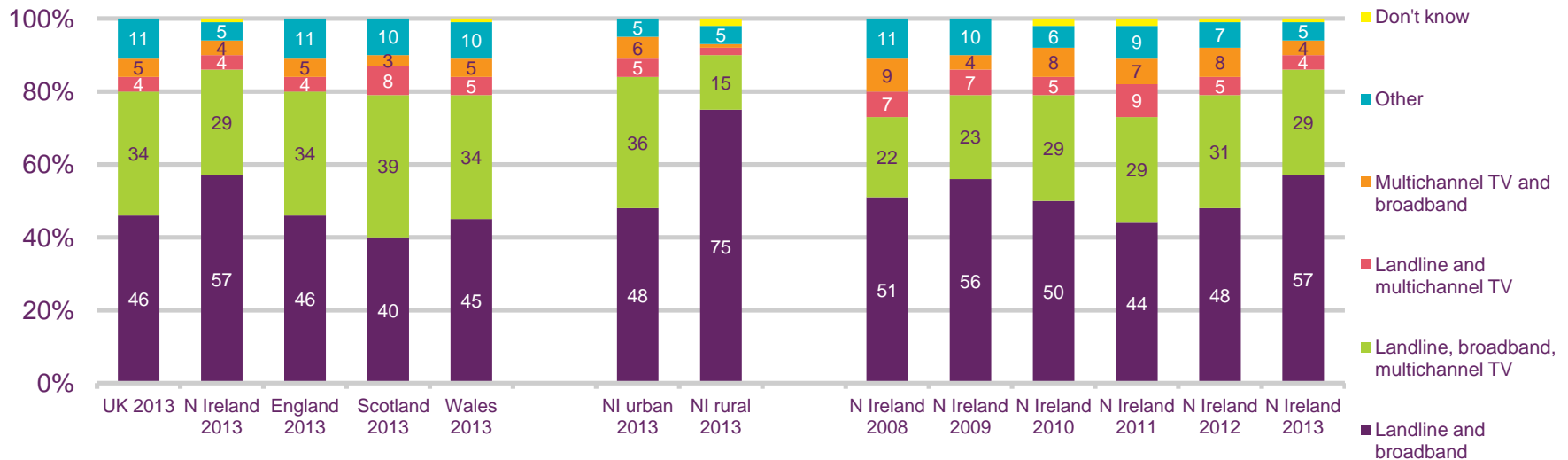
Source: Ofcom research, Q1 2013

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2104 UK, 1309 England, 297 Scotland, 220 Wales, 278 Northern Ireland)

Note: Remaining percentages are Don't know responses



# Figure 1.17 Trends in purchasing multiple communication services from a single supplier



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

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2104 UK, 278 Northern Ireland, 1309 England, 297 Scotland, 220 Wales, 145 Northern Ireland urban, 133 Northern Ireland rural, 192 Northern Ireland 2008, 264 Northern Ireland 2009, 332 Northern Ireland 2010, 222 Northern Ireland 2011, 254 Northern Ireland 2012, 278 Northern Ireland 2013)

## Figure 1.18

### 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

## Figure 1.19

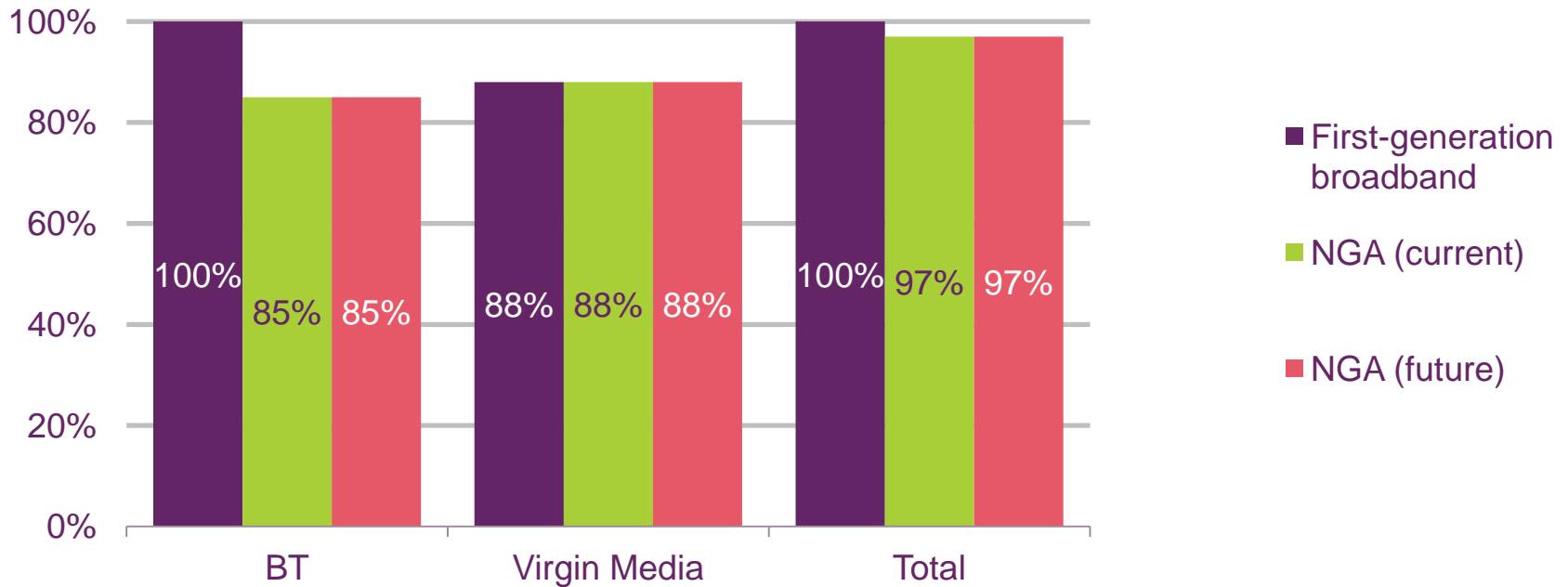
Map of area local to Belfast highlighting city boundary



Source: Analysys Mason

## Figure 1.20

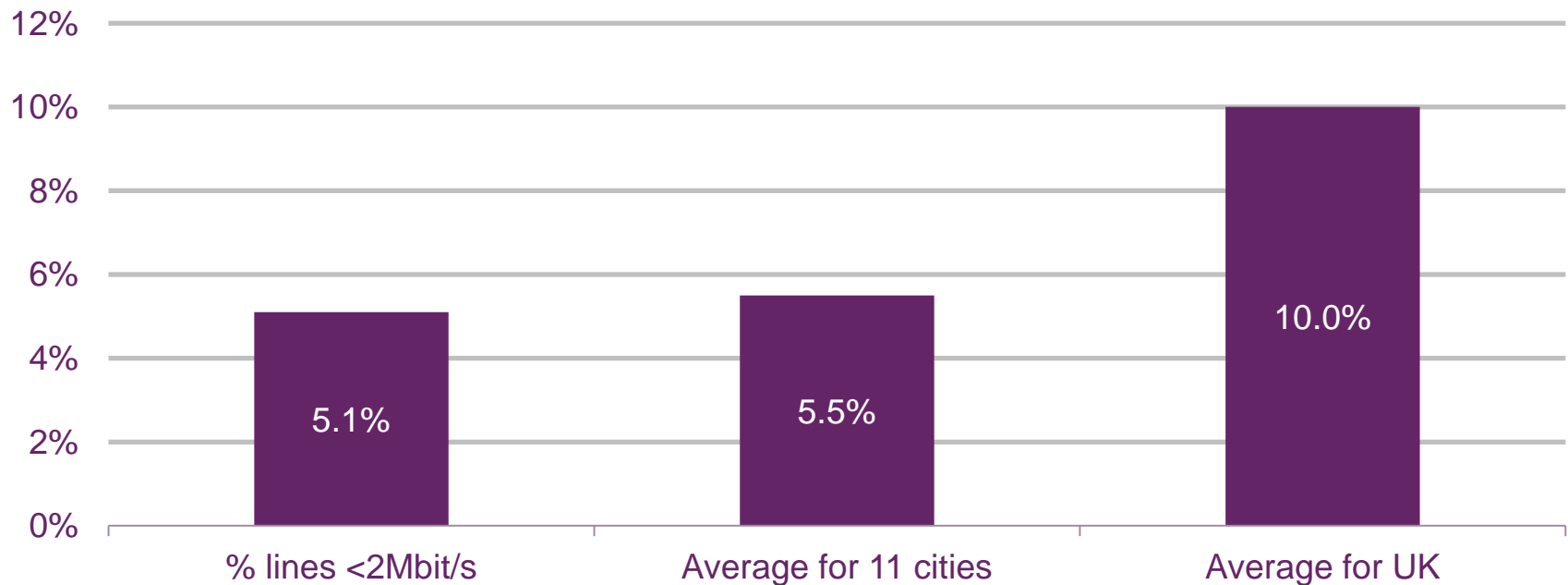
### Fixed network infrastructure premises passed availability



Source: Analysys Mason, Ofcom Infrastructure Report

## Figure 1.21

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



Source: Analysys Mason, Ofcom Infrastructure Report

## Figure 1.22

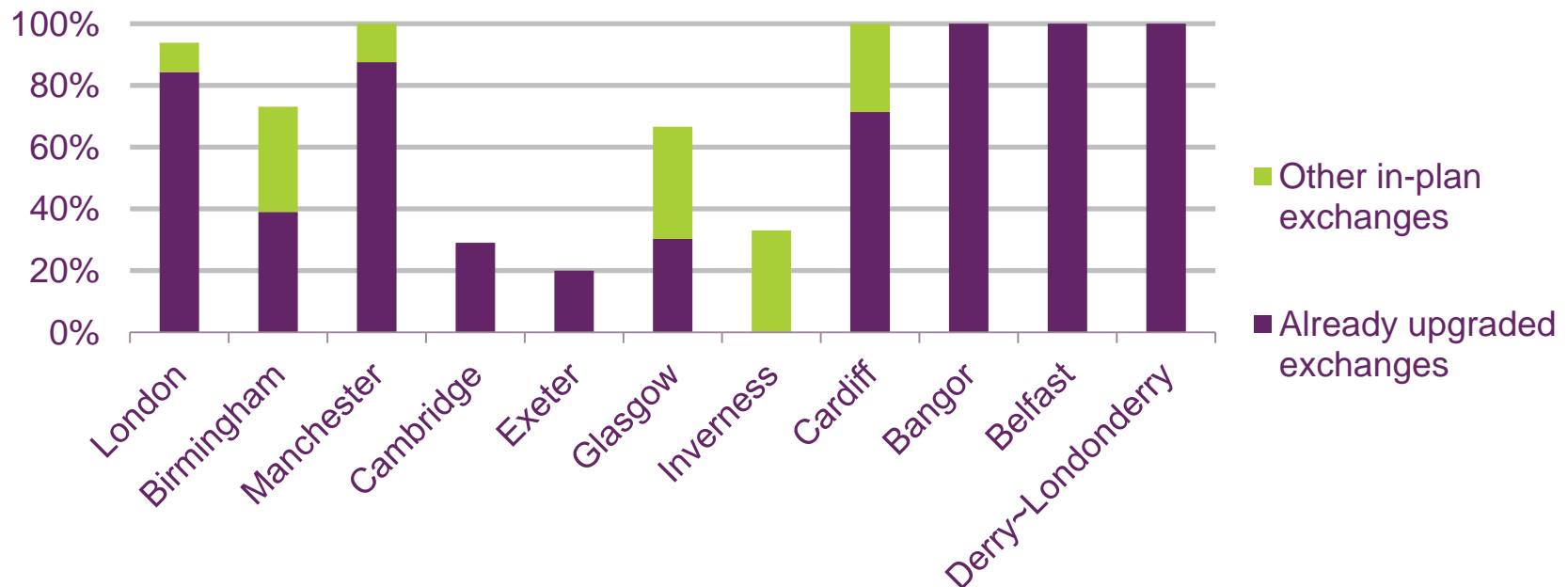
Number of exchanges and % of lines with access to basic broadband

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

## Figure 1.23

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



Source: Analysys Mason

# Figure 1.24

## 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



## Figure 1.25

### 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

## Figure 1.26

### 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

## Figure 1.27

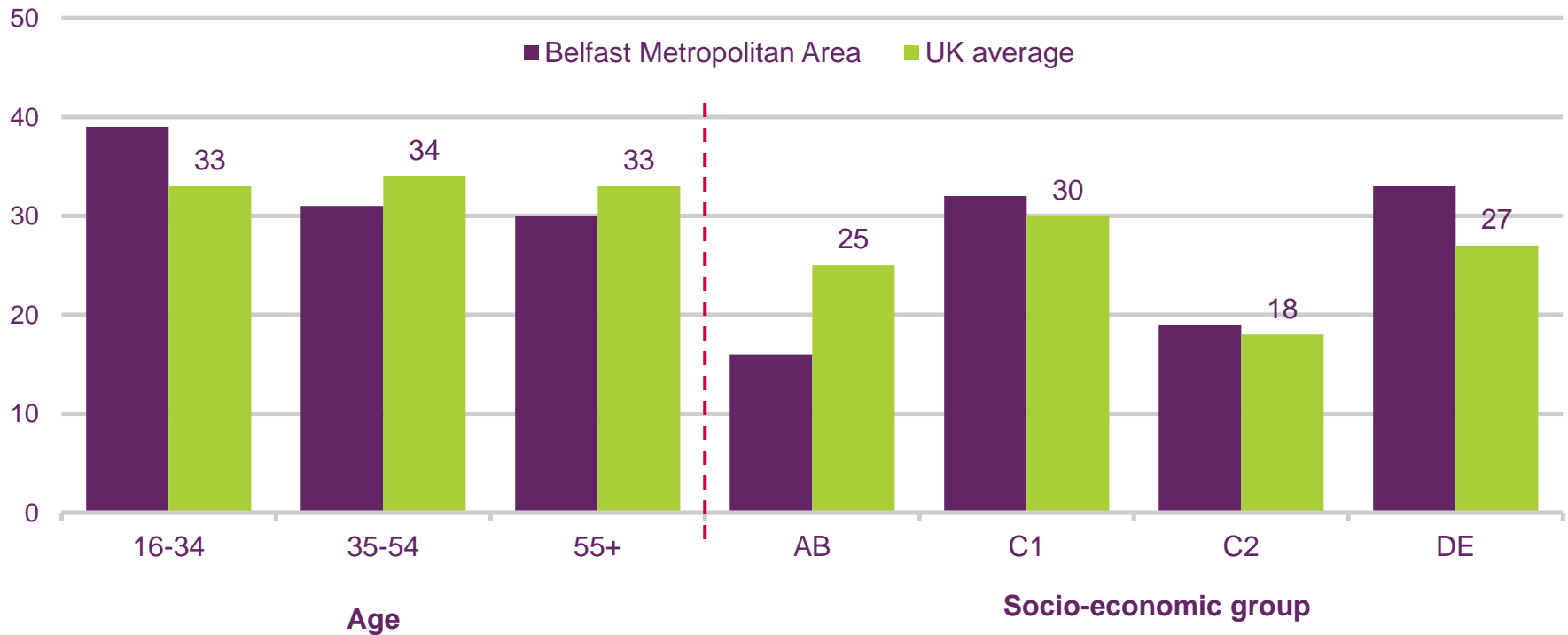
Average maximum modem synch. speed compared to other cities

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

# Figure 1.28

## Age and SEG profile



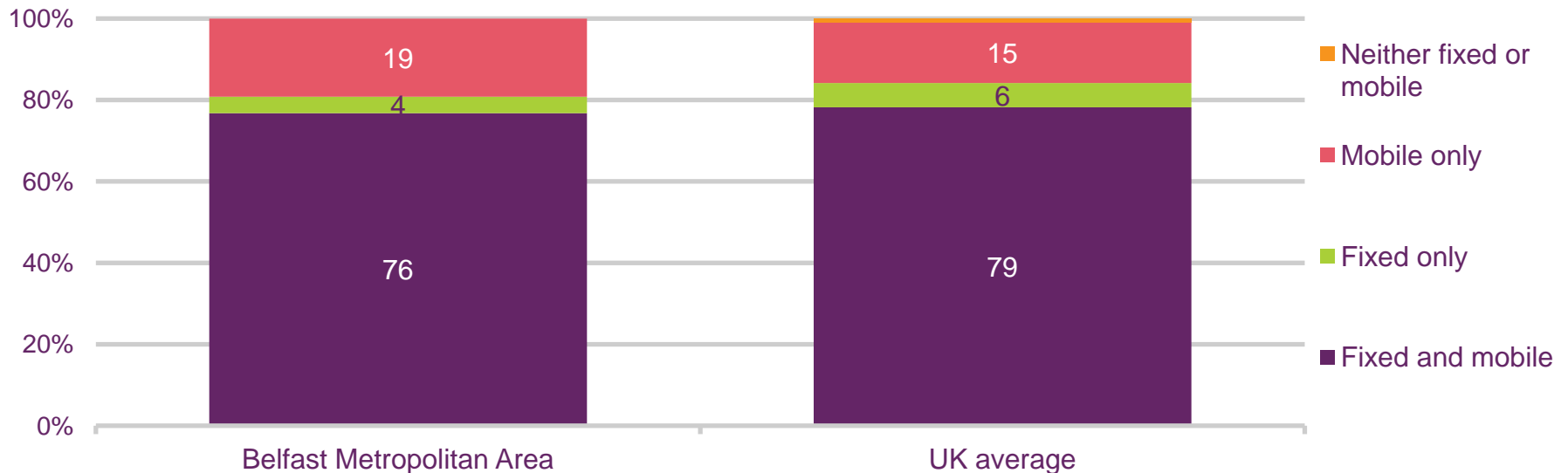
SF. What is your age?/ QZ8. What is the occupation of the main wage earner in your household?

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

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

# Figure 1.29

## Household penetration of fixed and mobile telephony

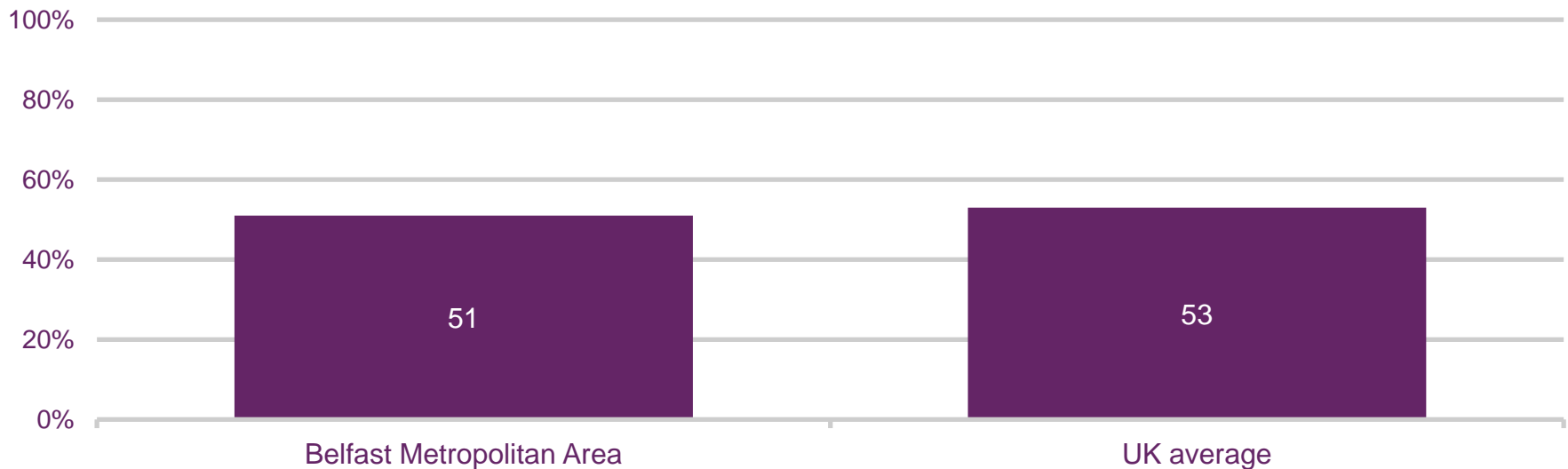


QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

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

## Figure 1.30

### Take-up of smartphones among mobile phone users



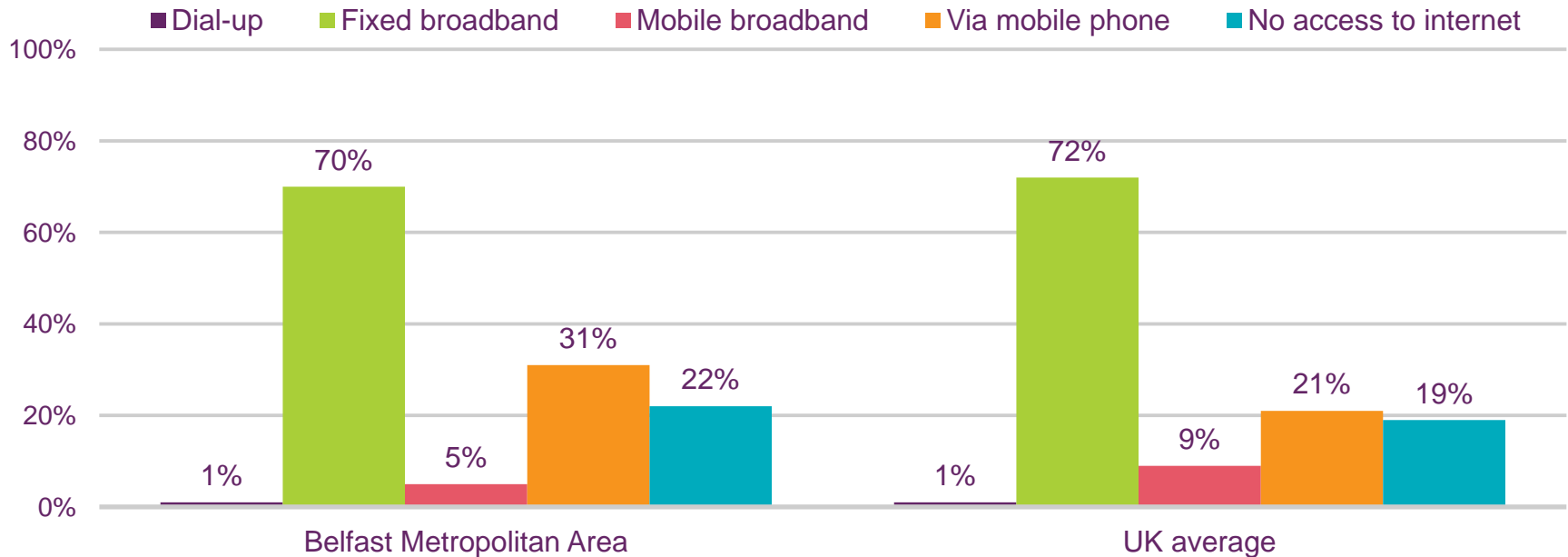
QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

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

# Figure 1.31

## Internet access by type

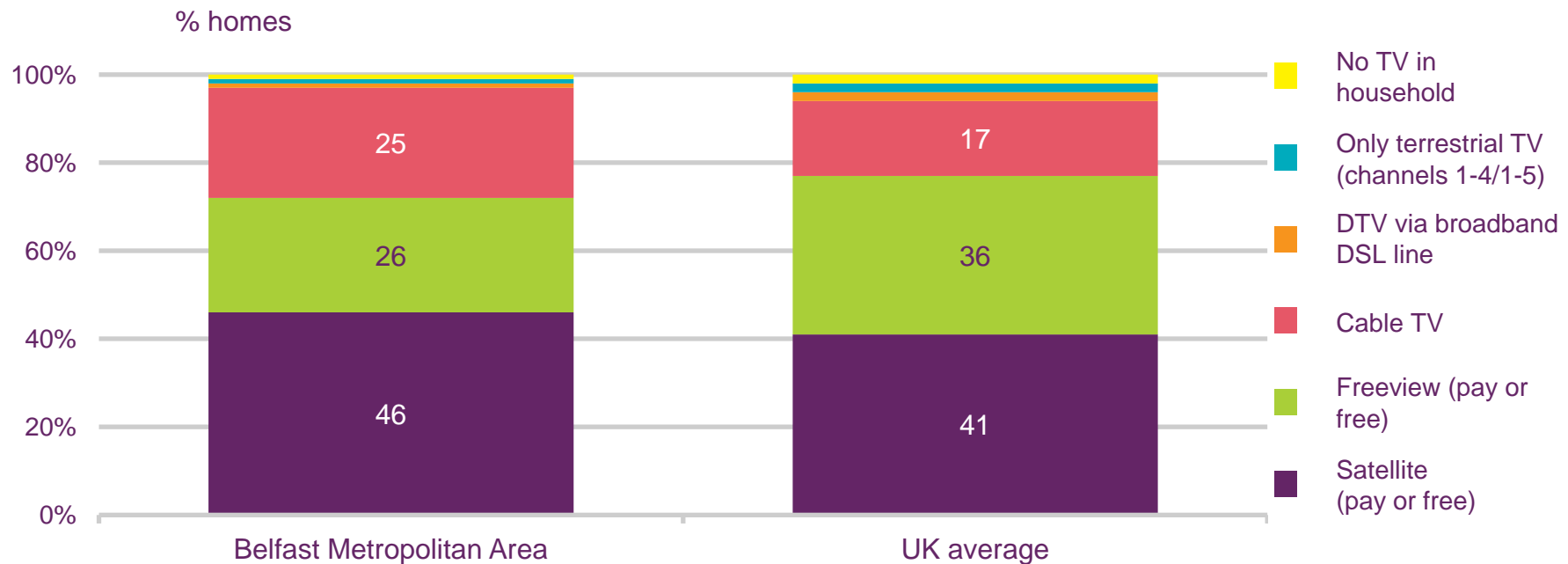


QE2. Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QE9. Which of these methods does your household use to connect to the Internet at home?

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

# Figure 1.32

## 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



## Figure 1.33

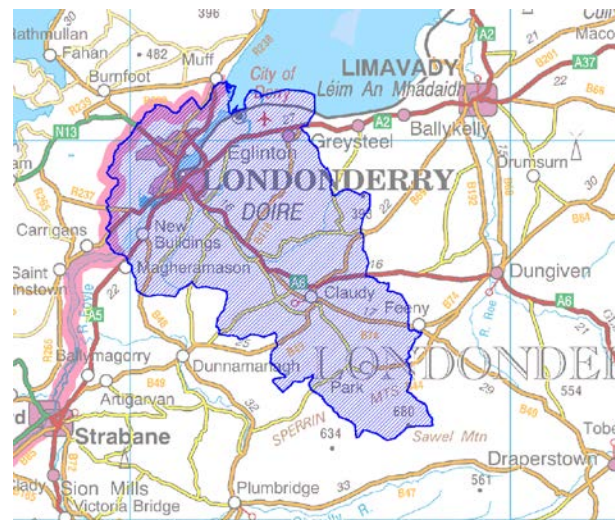
### City population and premises data

City	Population	Total premises	Business premises	Residential premises
Derry~Londonderry	c.110,000	c.43,000	c.2,000	c.41,000

Source: Analysys Mason

# Figure 1.34

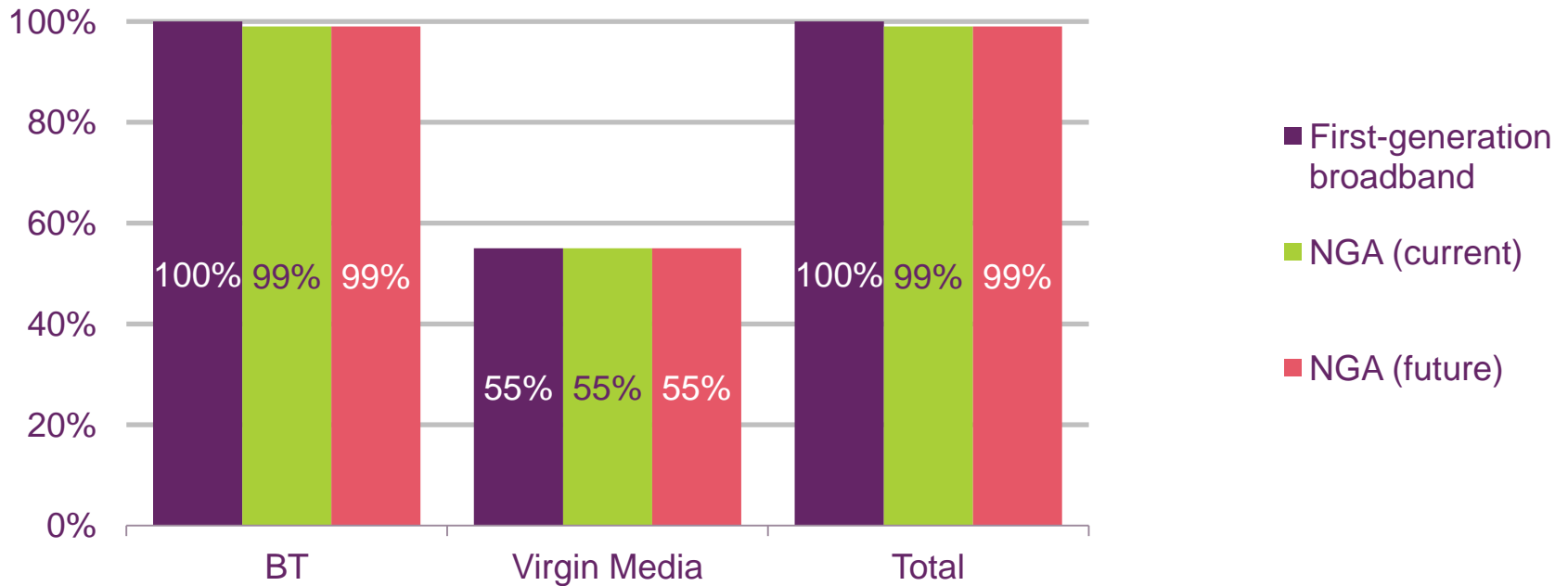
Map of local area highlighting city boundary



Source: Analysys Mason

# Figure 1.35

## Fixed network infrastructure premises passed availability



Source: Analysys Mason, Ofcom Infrastructure Report

## Figure 1.36

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



Source: Analysys Mason, Ofcom Infrastructure Report

## Figure 1.37

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

# Figure 1.38

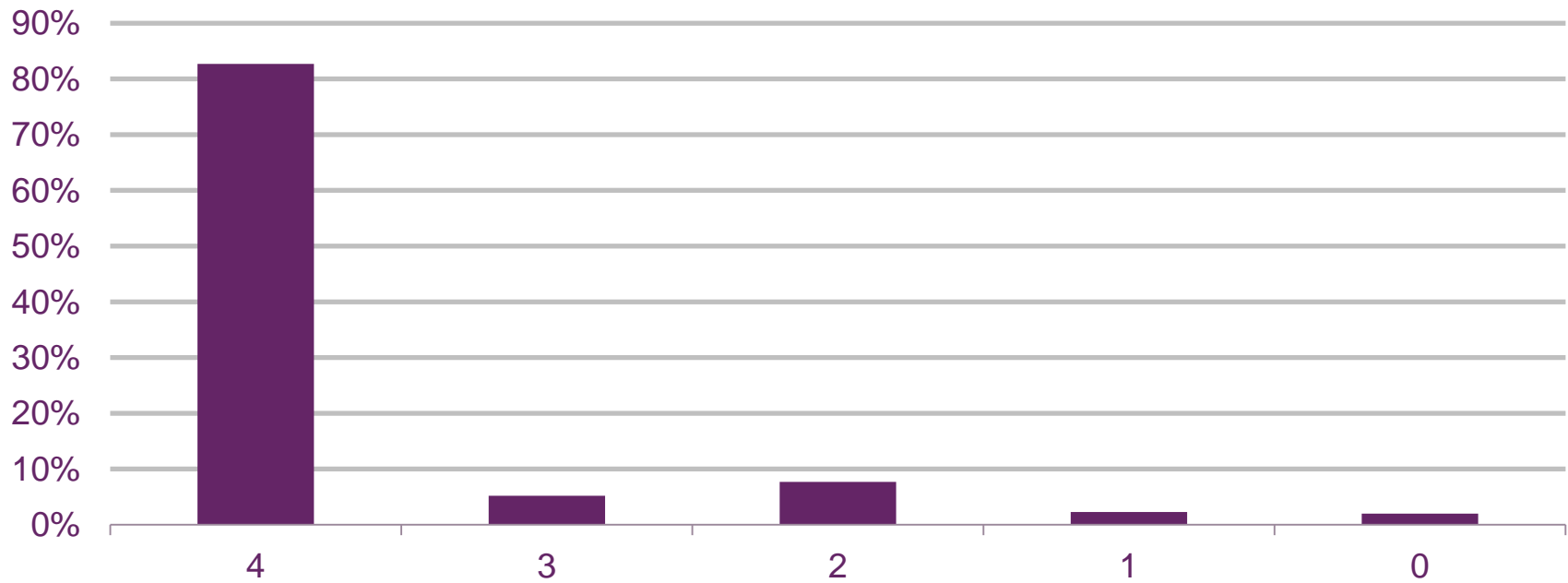
## Key city hotspots data

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

## Figure 1.39

### 3G mobile coverage in city



Source: Analysys Mason

## Figure 1.40

### Key city exchange data

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

Source: Analysys Mason



## Figure 1.41

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