

# Technology Tracker

H2 2015 (July-August)

## Purpose of the research

- The Technology Tracker accurately measures awareness, access, usage and attitudes towards fixed and mobile telecoms, internet, multi-channel TV, and radio among UK adults (aged 16+).
- Across the UK overall, and within each UK nation, the Technology Tracker provides detailed analysis by key population demographics, sub-region, and by urban vs rural.
- It collects data that enables comparisons to be made with historic data collected by Ofcom, providing data to inform Ofcom analysis, reports and decisions.

## Methodology

- Since 2014 there are two waves of research per year (three waves prior to 2014), conducted via face-to-face interviews in the home, with a nationally representative sample of UK adults aged 16+.
- Previous years' waves are referred to Q1, Q2, and Q3; from 2015, these are referred to as H1 and H2 (half).
- H1 fieldwork takes place January-February; H2 fieldwork runs from July to August each year.

## Data tables

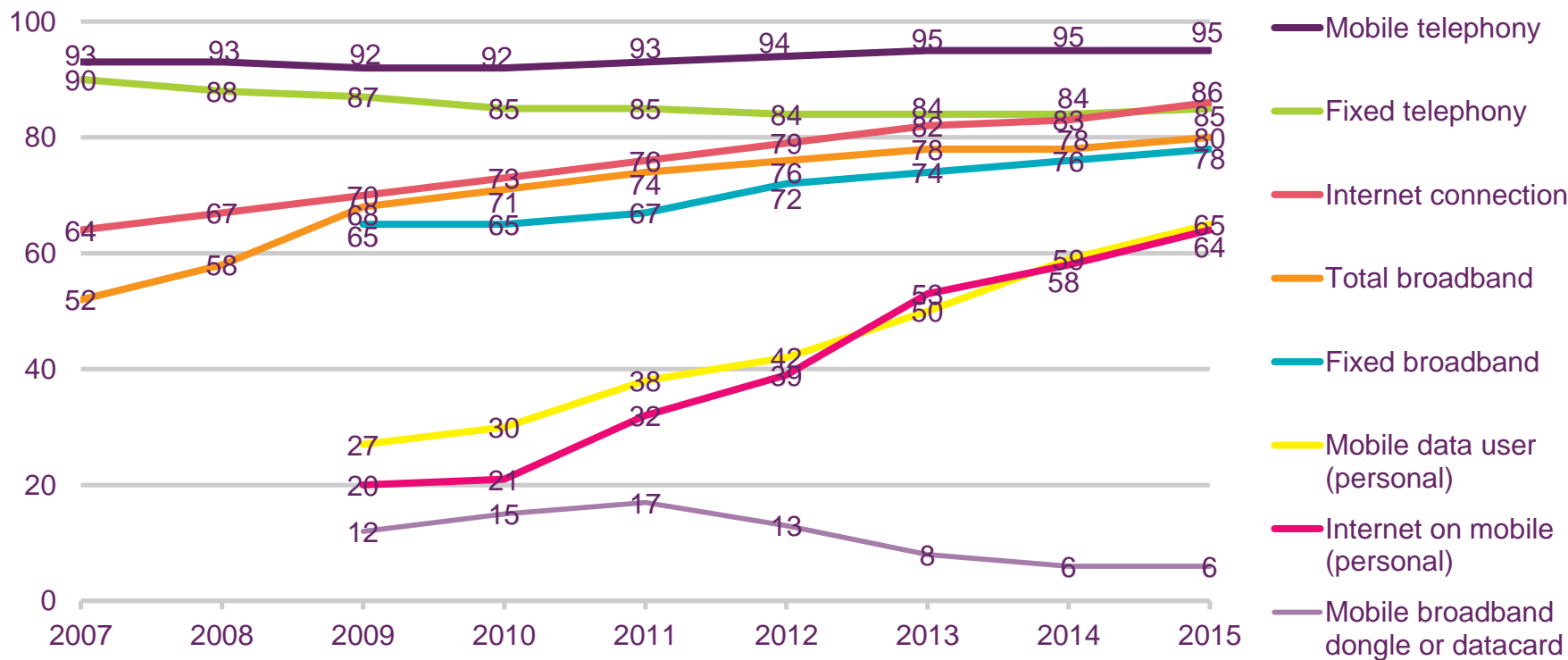
- Data tables for this wave of research can be found at:  
[http://stakeholders.ofcom.org.uk/binaries/research/statistics/2015oct/Ofcom\\_Technology\\_Tracker\\_Half\\_2\\_2015\\_UK\\_data\\_tables.pdf](http://stakeholders.ofcom.org.uk/binaries/research/statistics/2015oct/Ofcom_Technology_Tracker_Half_2_2015_UK_data_tables.pdf)
- Previous waves of our Technology Tracker study can be found on the Ofcom website, under the statistical release calendar: <http://stakeholders.ofcom.org.uk/market-data-research/statistics/>

# Take up of communications services

# Household take-up of communications services



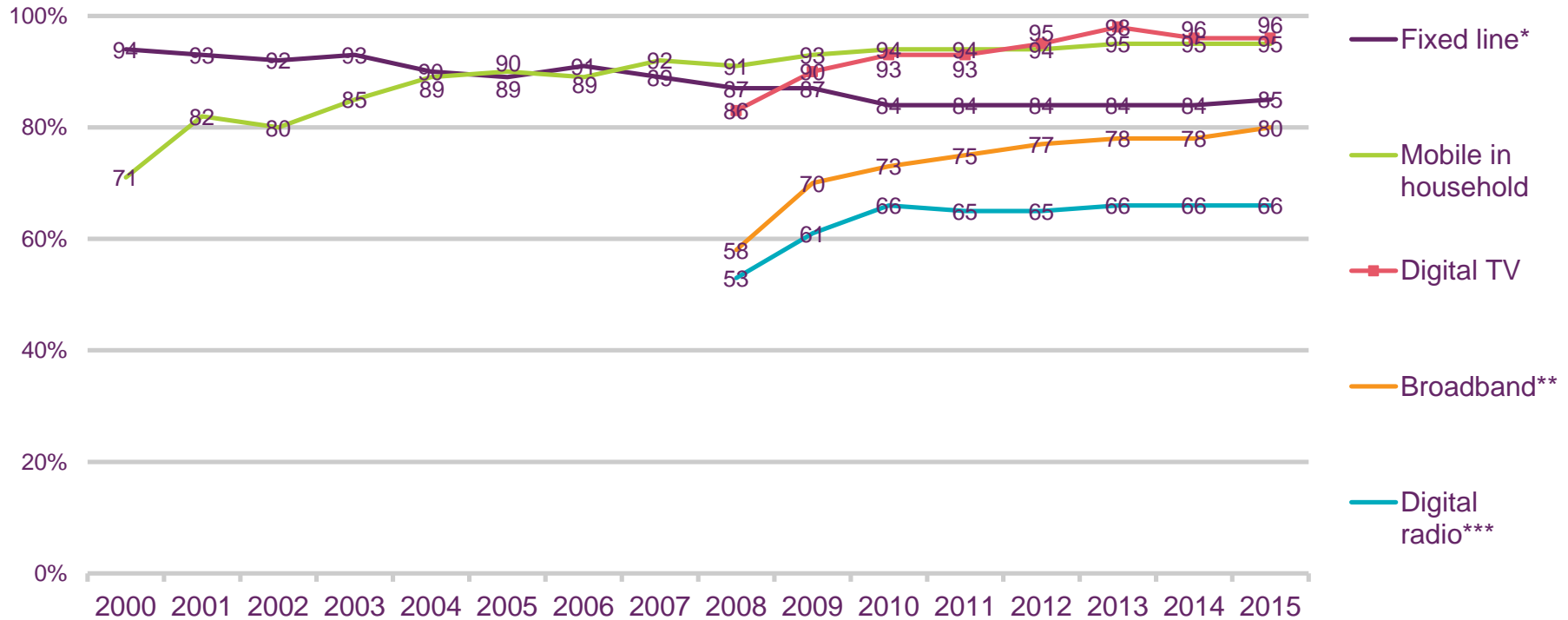
Proportion of households/ adults (%)



Source: Ofcom Technology Tracker, data as at Q1 2007- 2012; Q2 2013-2014; H2 2015 (mobile data user Q1 2013- 2015)

Base: All adults aged 16+ (Q1 2007, 2311) (Q1 2008, 5812) (Q1 2009, 6090) (Q1 2010, 9013) (Q1 2011, 3474) (Q1 2012, 3772) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

# Take-up of communications services in the household



Source: Ofcom Technology Tracker, data as at Q4 2000-2005; Q2 2006-2014; H2 2015

Base: All adults 16+ (Q4 2000, 2133) (Q4 2001, 2159) (Q4 2002, 2138), (Q4 2003, 2150) (Q4 2004, 2131) (Q4 2005, 2214) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

\* Fixed line phone in the home for making/receiving calls

\*\* Household broadband excludes using a mobile phone.

\*\*\* Access to digital radio channels in the home (through specialist DAB radio receiver, digital television or over the internet)

# Take-up of communications services in the household by nation



	UK	England	Scotland	Wales	Northern Ireland
Fixed line	85%	86%	84%	76%	81%
Mobile Phone	95%	95%	91%	97%	92%
Digital TV	96%	96%	97%	96%	96%
Digital Radio*	66%	67%	68%	62%	35%
Broadband	80%	82%	73%	73%	69%
Mobile broadband ONLY	2%	3%	2%	0%	1%
Fixed broadband ONLY**	74%	75%	68%	70%	66%
Fixed and mobile broadband ONLY	4%	4%	2%	2%	2%

Source: Ofcom Technology Tracker, H2 2015

Base: All adults 16+ (2863)

\* Access to digital radio channels in the home (through specialist DAB radio receiver, digital television or over the internet)

\*\* Fixed broadband ONLY means take-up of fixed broadband but NOT mobile broadband

# Take-up of devices in the household by nation



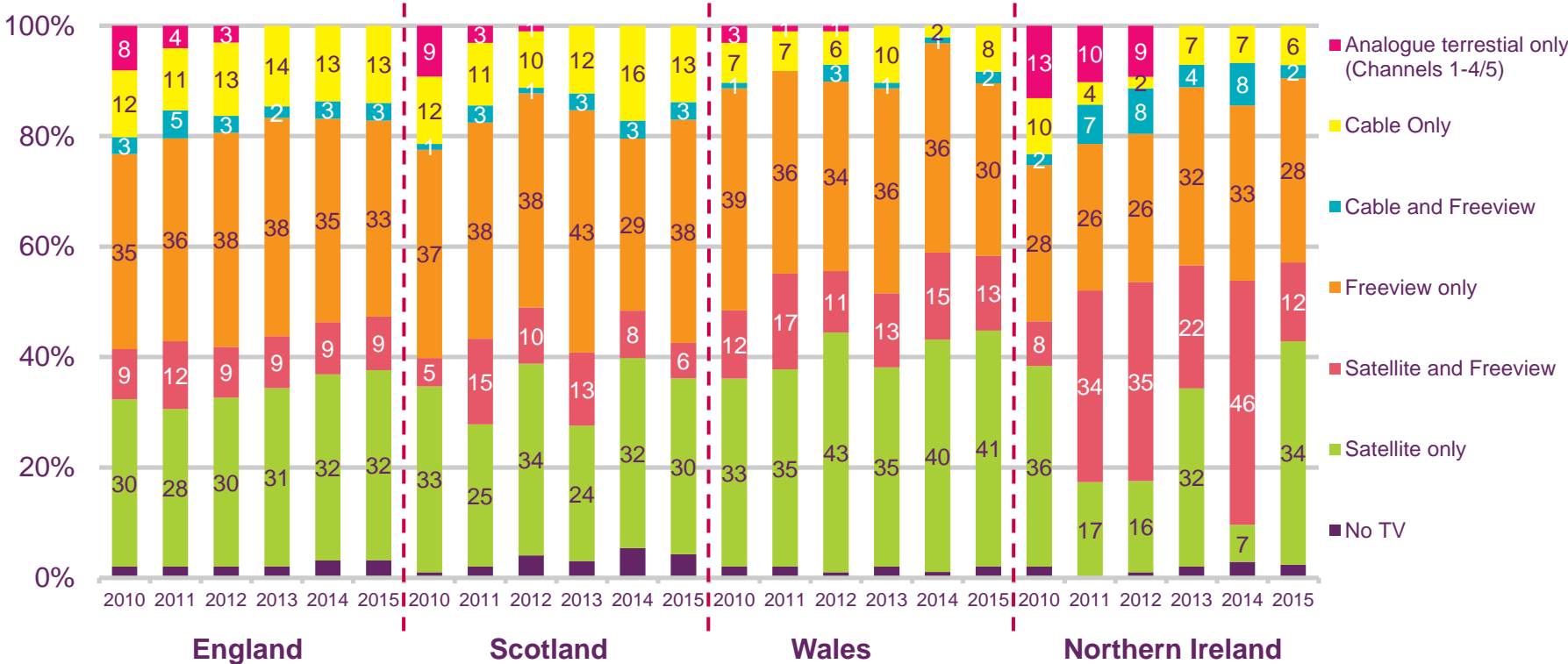
	UK	England	Scotland	Wales	Northern Ireland
Mobile phone take-up	92%	92%	89%	93%	92%
Smartphone take-up	70%	71%	64%	62%	67%
DAB ownership amongst radio listeners*	43%	44%	37%	47%	29%
Smart TV ownership among TV homes*	21%	21%	19%	17%	15%
Tablet computer take-up	57%	58%	54%	54%	54%
E-reader take-up (personal use)*	20%	20%	14%	19%	15%

Source: Ofcom Technology Tracker, H2 2015

Base: All adults 16+ (2863)

\* Figures from H1 2015 (Radio listeners 2934, TV homes 3616, All adults 3756)

# Multi-platform ownership, by nation

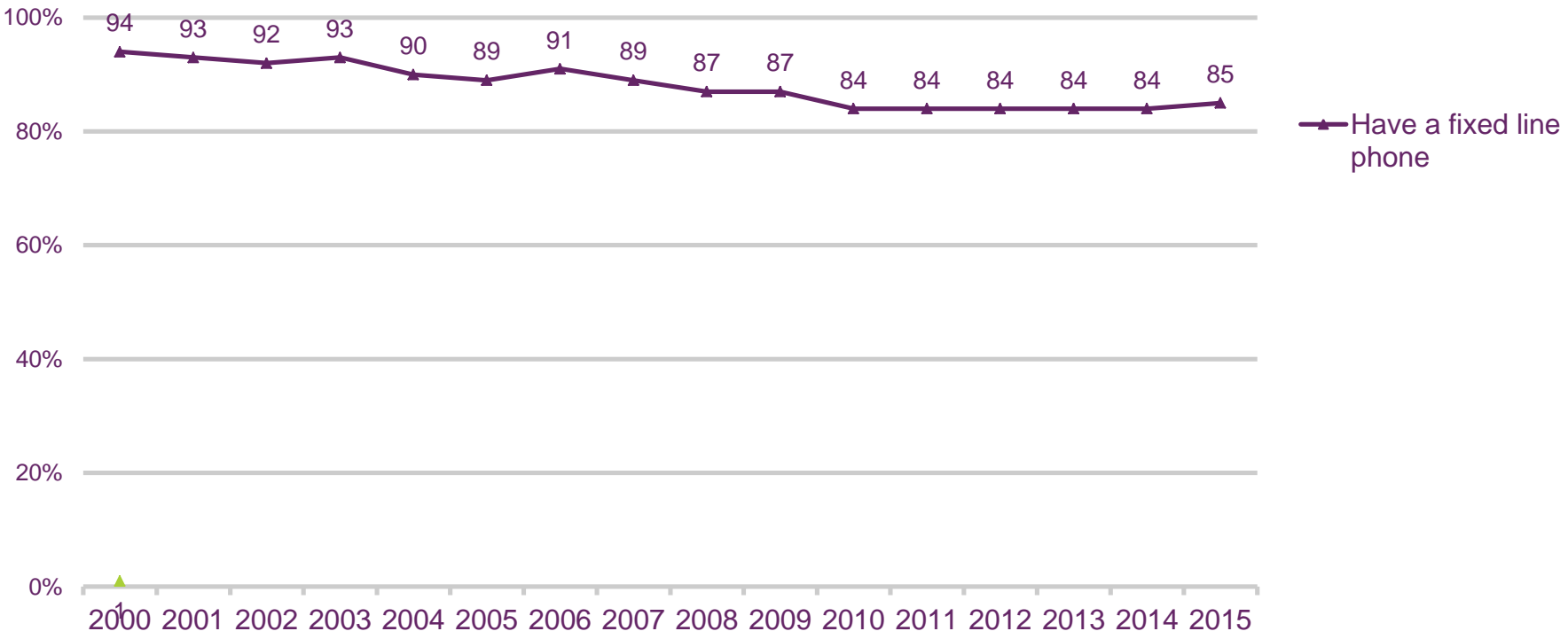


Source: Ofcom Technology Tracker, data as at Q1 2010-2014; H1 2015  
 Base: All adults 16+ (Q1 2010, 9103) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750) (Q1 2014, 3740) (H1 2015, 3756)  
 Question: Which, if any, of these types of television does your household receive at the moment?  
 Note: Remaining percentages are those who own other types of TV (e.g. via Broadband DSL)



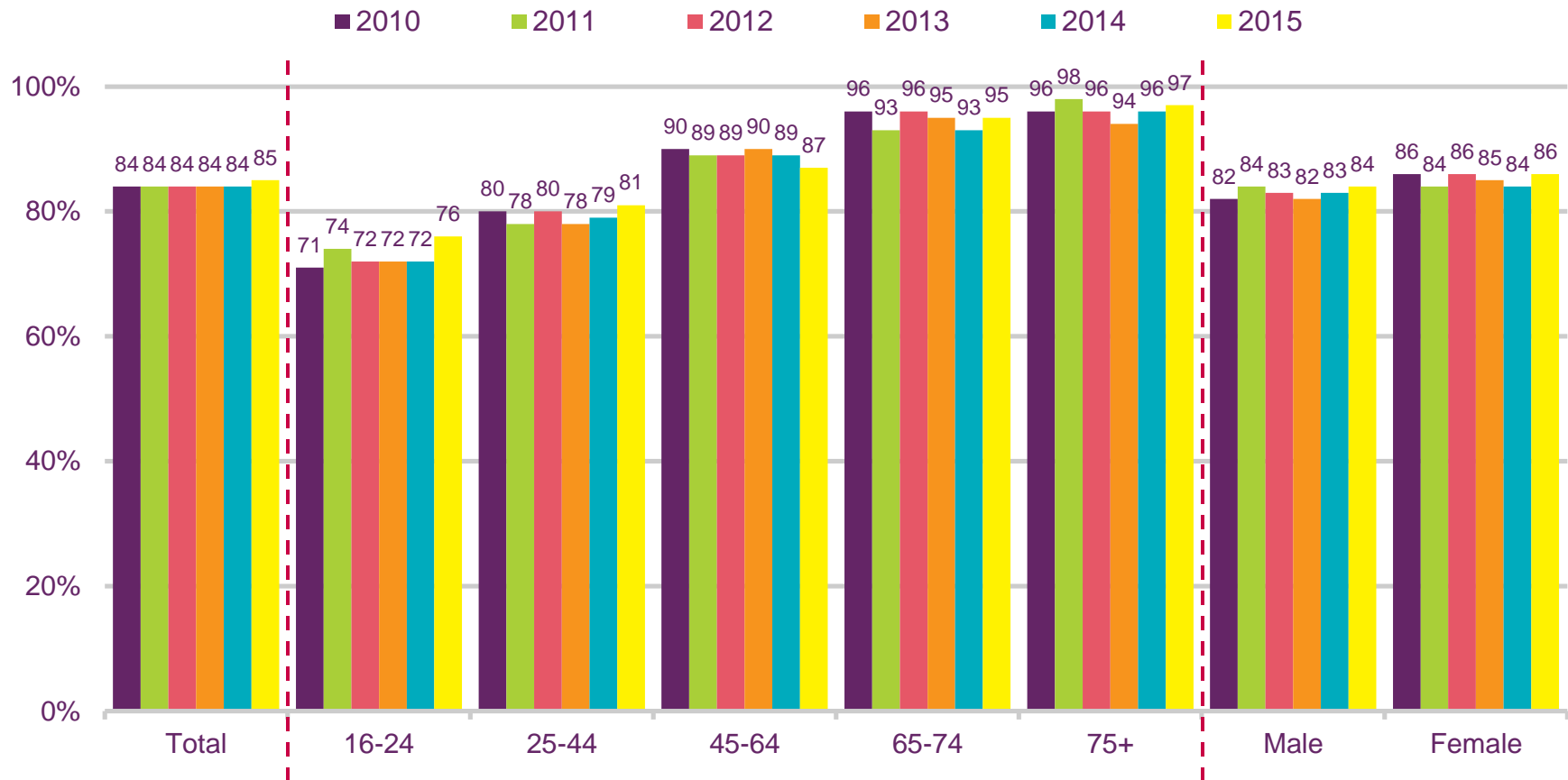
# Telecoms ownership

# Take-up of fixed line phones: 2000-2015



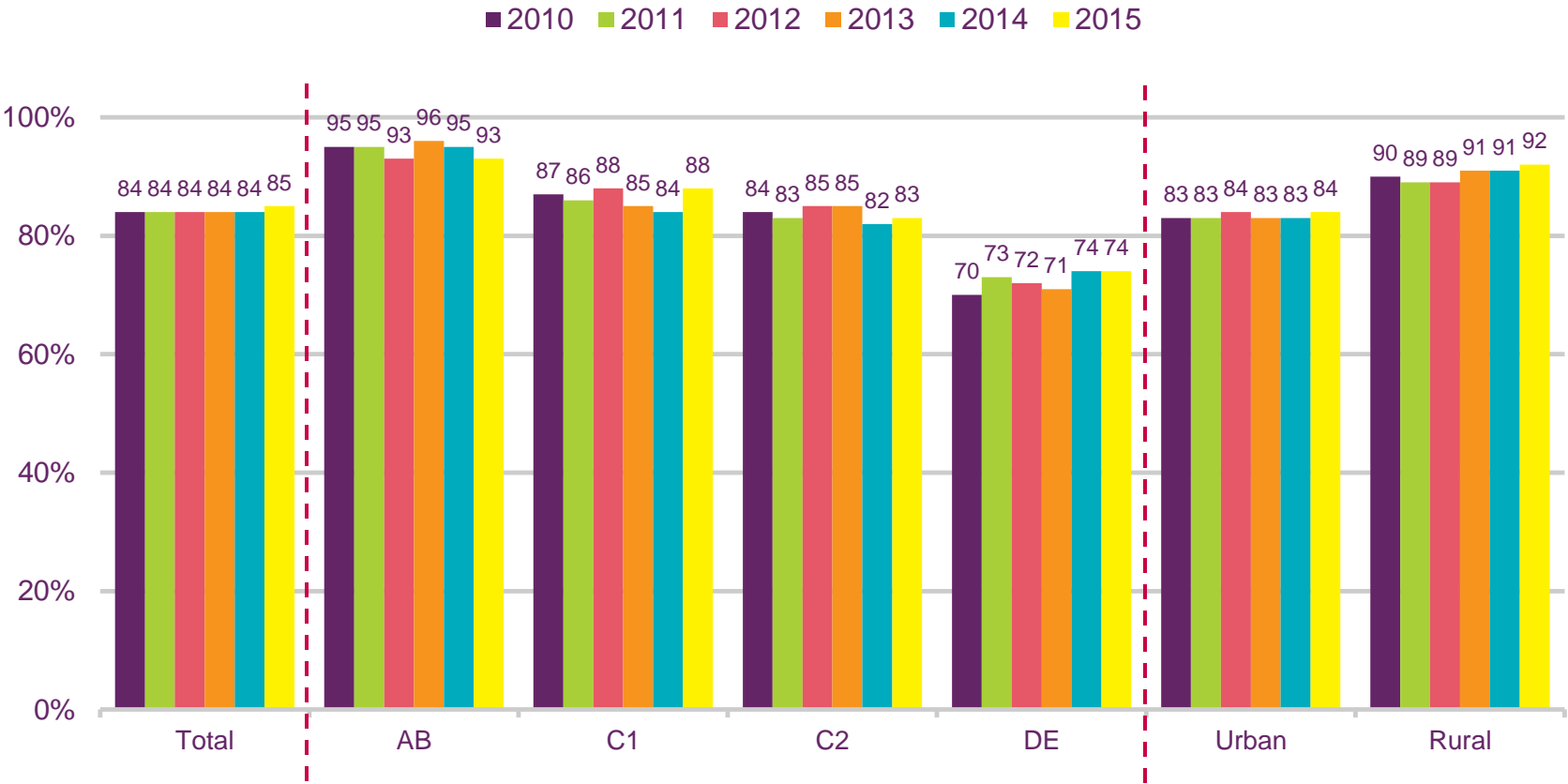
Source: Ofcom Technology Tracker, data as at Q4 2000-2005; Q2 2006-2014; H2 2015  
Base: All adults 16+ (Q4 2000, 2133) (Q4 2001, 2159) (Q4 2002, 2138), (Q4 2003, 2150) (Q4 2004, 2131) (Q4 2005, 2214) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
Question: Is there a landline phone in your home that can be used to make and receive calls?

# Age and gender profile of consumers who have taken up fixed-line services



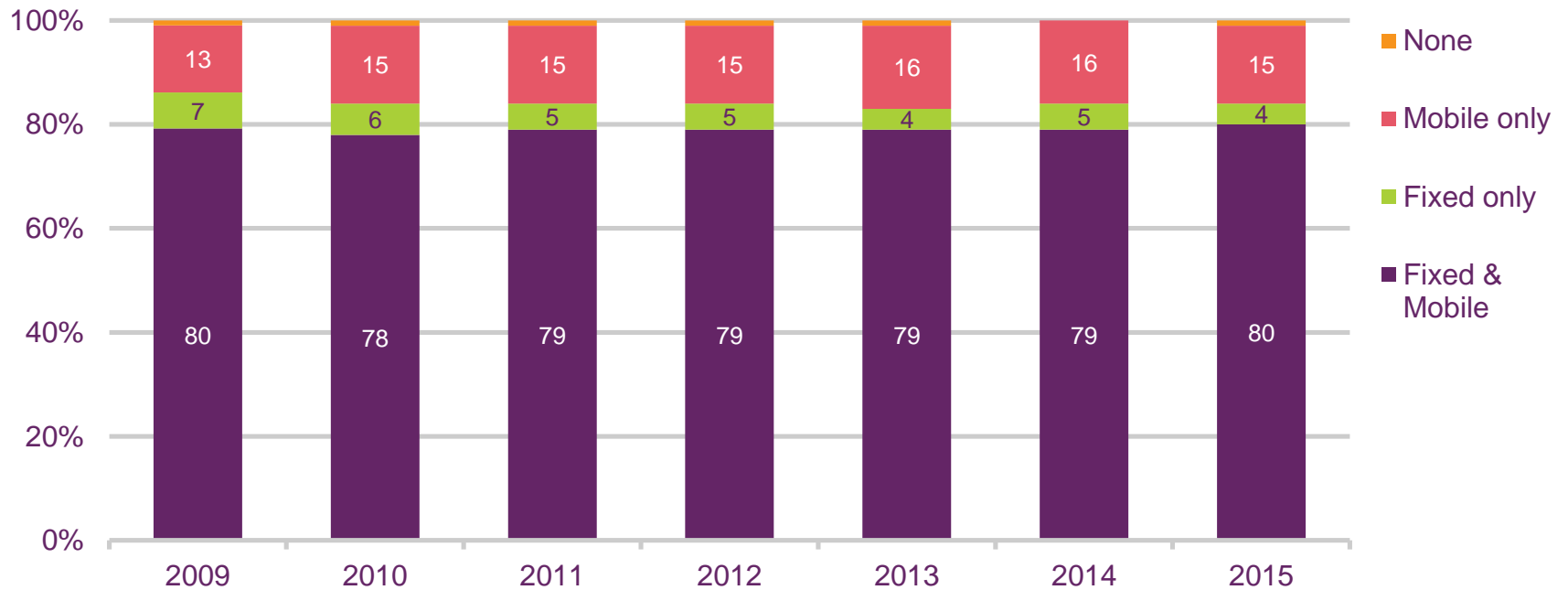
Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Is there a landline phone in your home that can be used to make and receive calls?

# Socio-economic and urbanity profile of consumers who have taken up fixed-line services



Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Is there a landline phone in your home that can be used to make and receive calls?

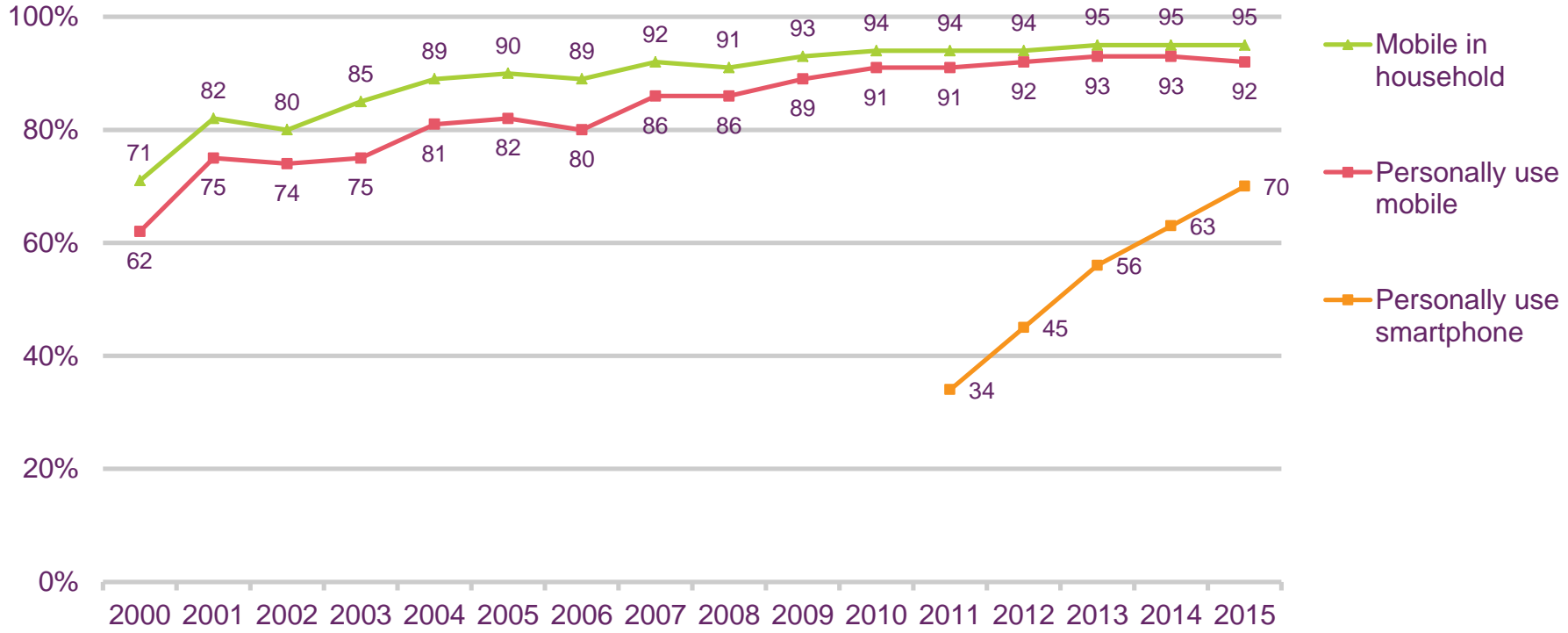
# Take-up of fixed-line and mobile services



Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015

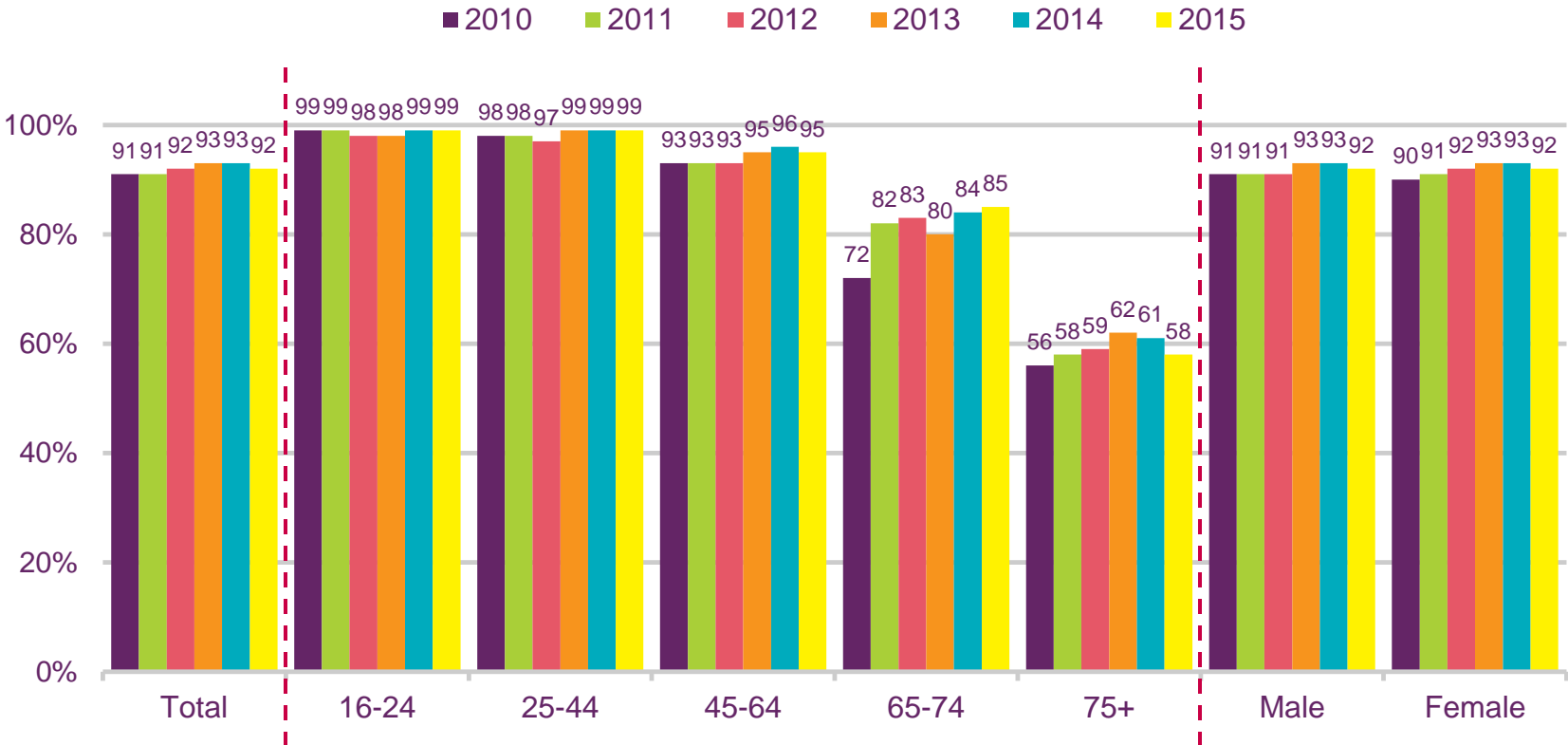
Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

# Take-up of mobile services: 2000-2015



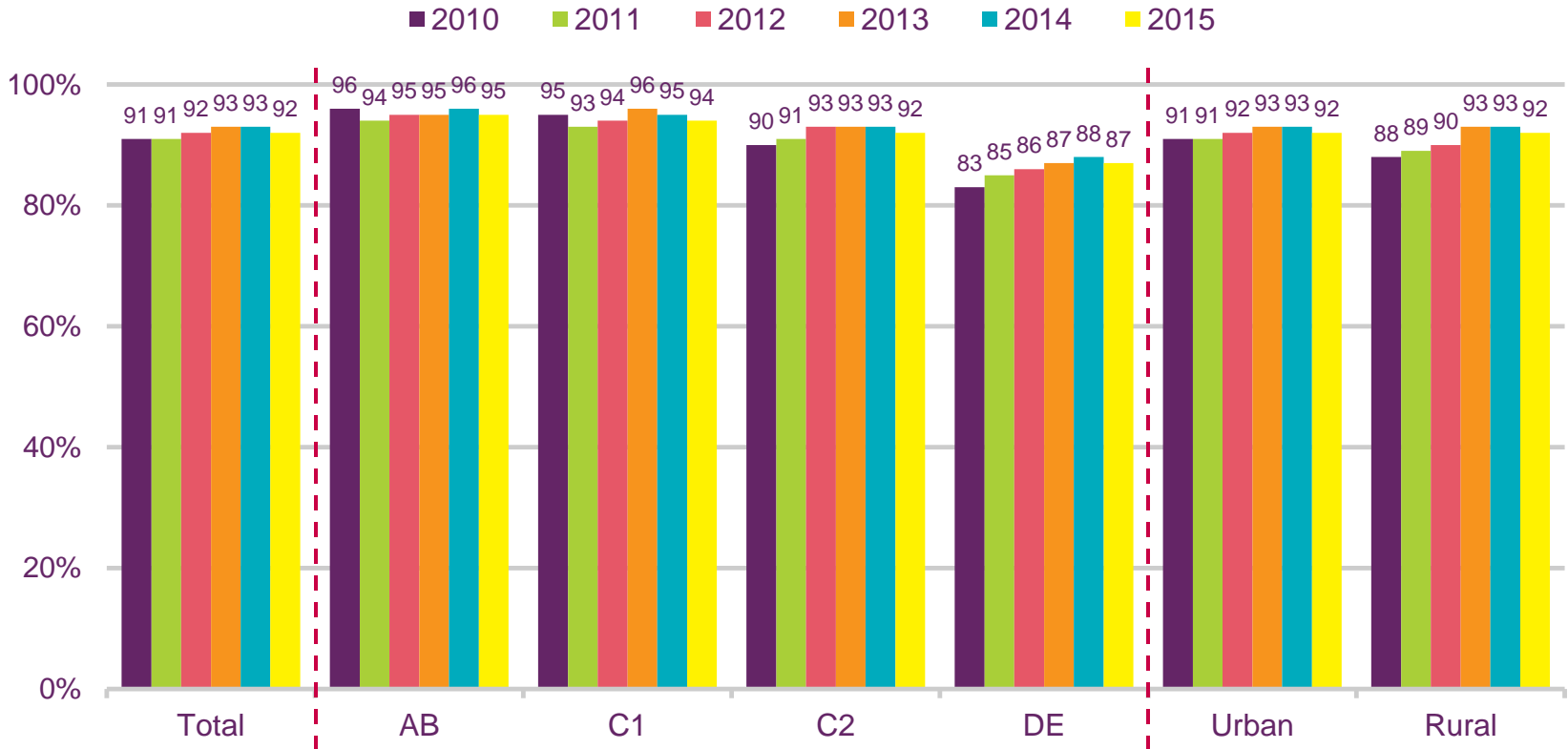
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# Age and gender profile of those who personally use mobile services



Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Do you personally use a mobile phone? How many mobile phones with different telephone numbers do you use at least once a month?  
 Please include any phones used for work or other purposes.

# Socio-economic and urbanity profile of those who personally use mobile services



Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Do you personally use a mobile phone? How many mobile phones with different telephone numbers do you use at least once a month?  
 Please include any phones used for work or other purposes.

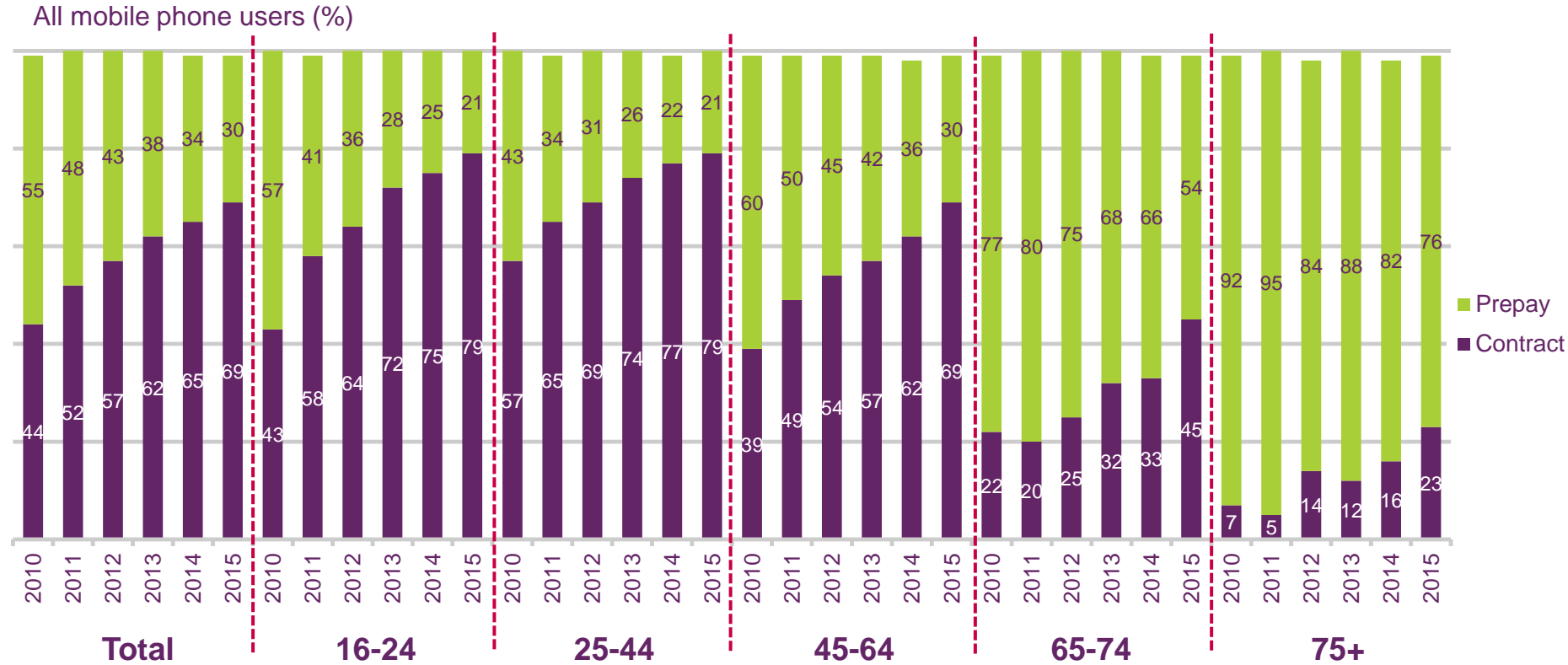


# Take-up of mobile packages



Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015  
 Base: Adults 16+ who personally use a mobile phone (Q2 2009, 1835) (Q2 2010, 1892) (Q2 2011, 2543) (Q2 2012, 2582) (Q2 2013, 2595) (Q2 2014, 2615) (H2 2015, 2570)  
 Question: Which of these best describes the mobile package you personally use most often?

# Pre-pay and contract users, by age



Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: Adults 16+ who personally use a mobile phone (Q2 2010, 1892) (Q2 2011, 2543) (Q2 2012, 2582) (Q2 2013, 2595) (Q2 2014, 2615) (H2 2015, 2570)  
 Question: Which of these best describes the mobile package you personally use most often?

# Socio-economic profile of pre-pay and contract users

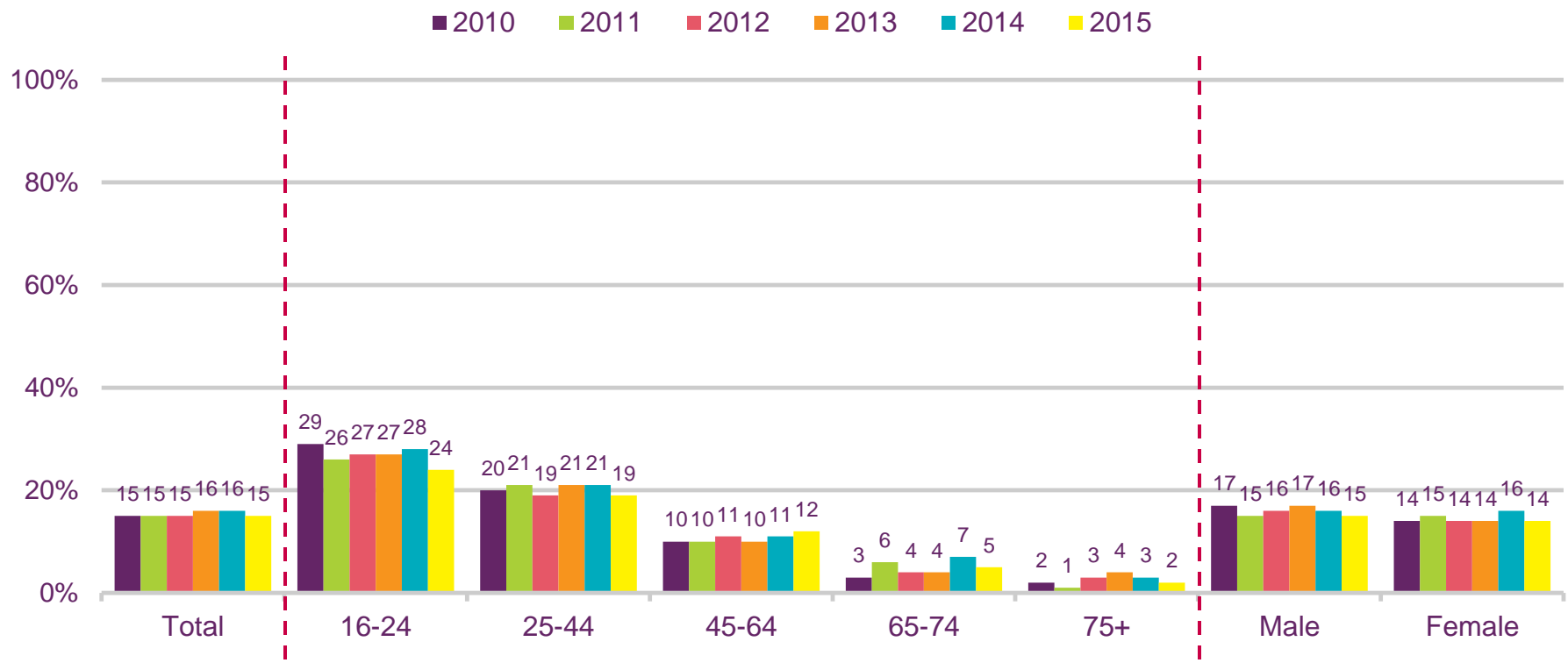


All mobile phone users (%)



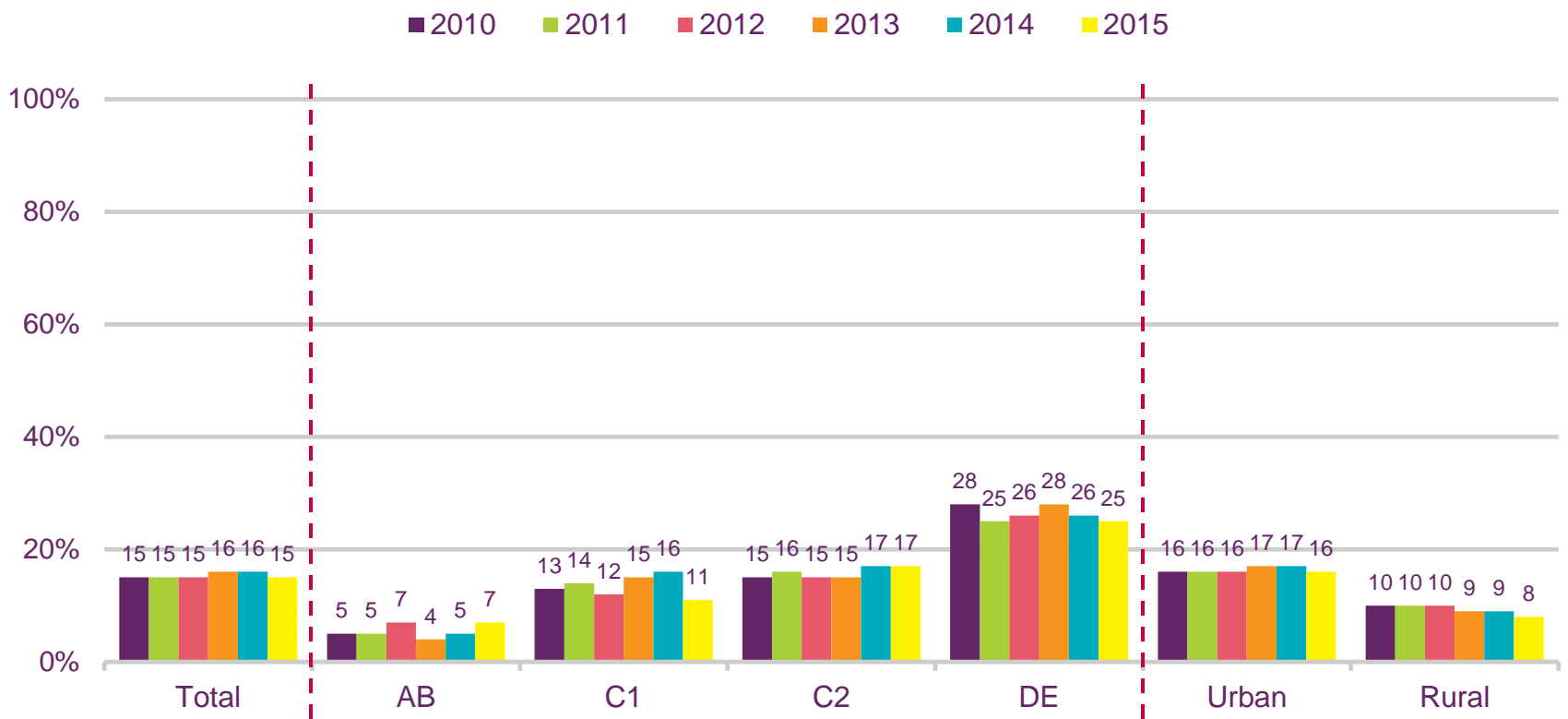
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 Question: Which of these best describes the mobile package you personally use most often?

# Age and gender profile of users of mobile-only telephony



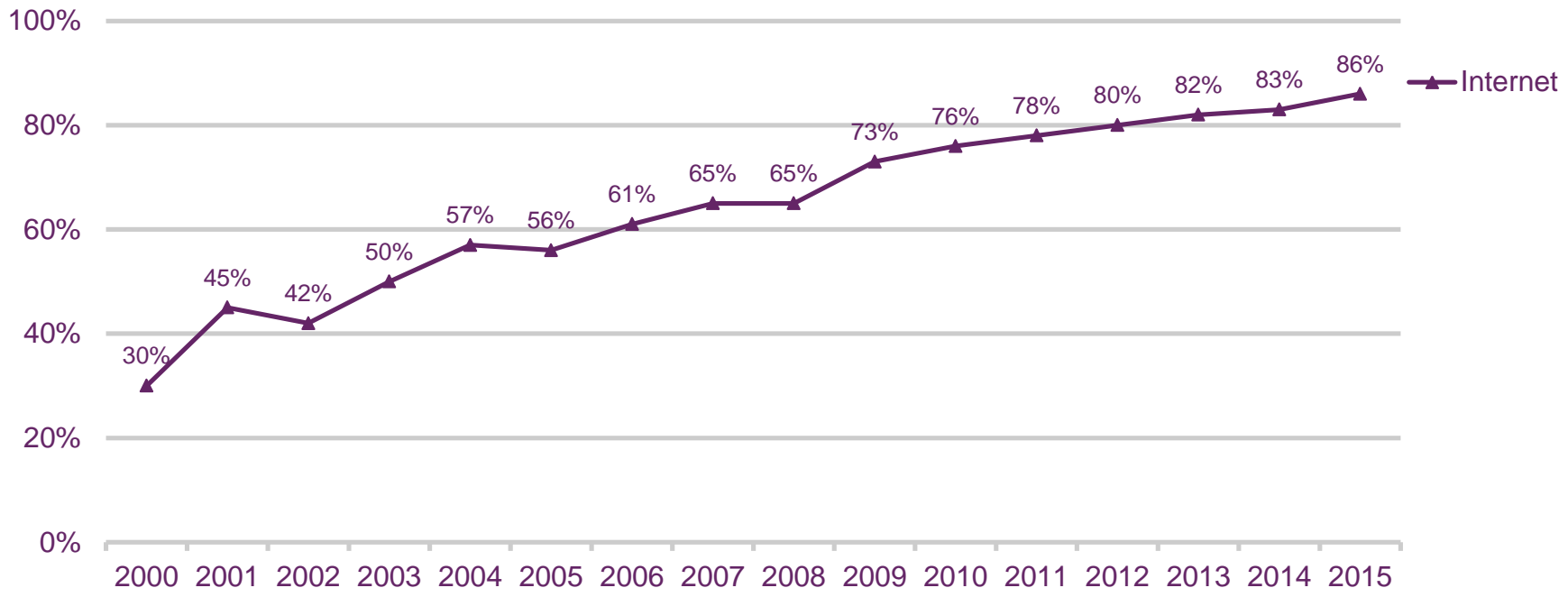
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 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

# Socio-economic and urbanity profile of users of mobile-only telephony



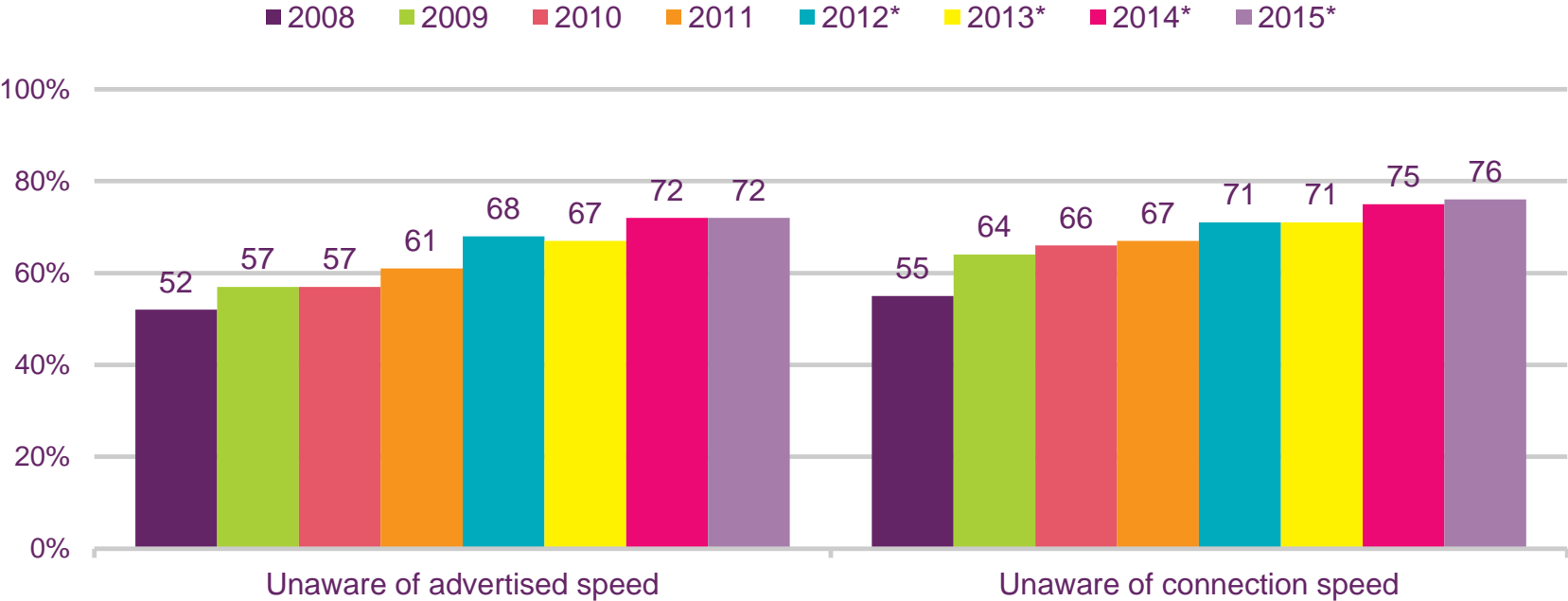
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# Take-up of the internet at home



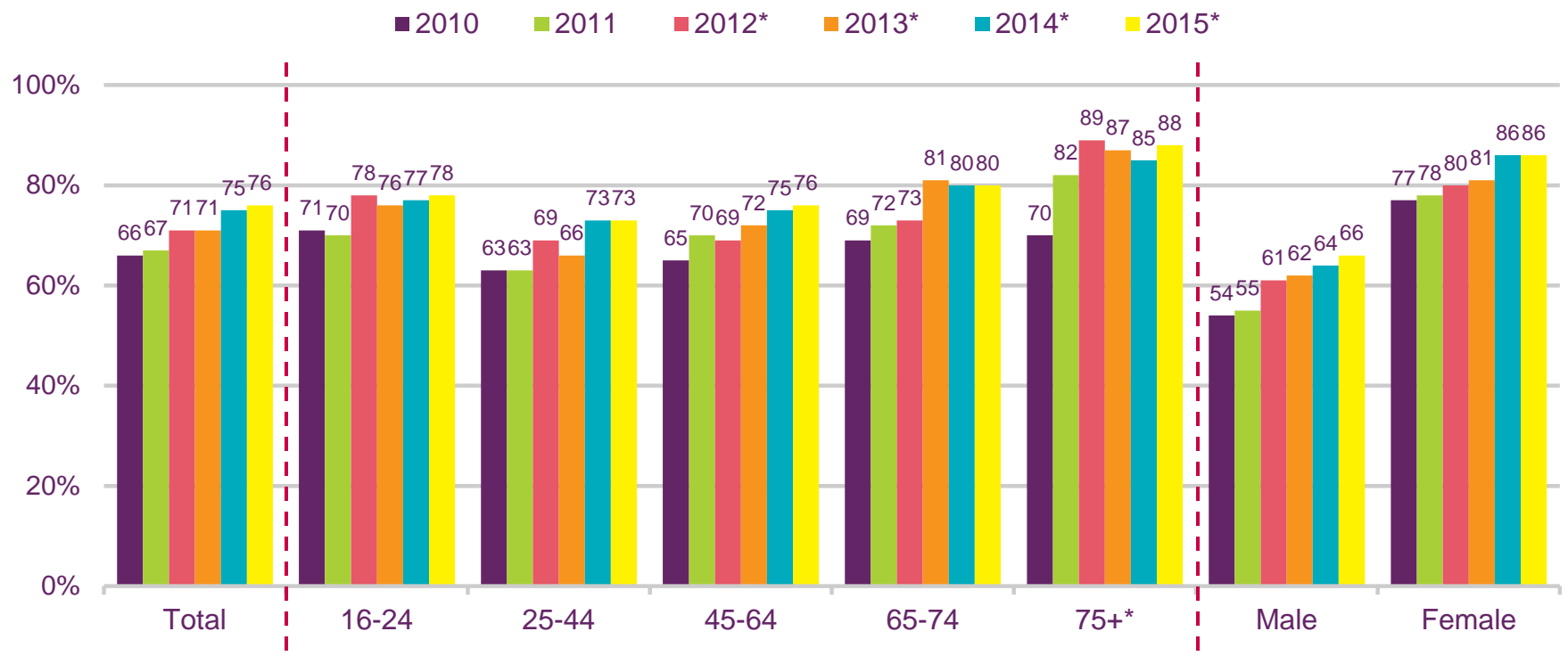
Source: Ofcom Technology Tracker, data as at Q4 2000-2005, Q2 2006-2014; H2 2015  
Base: All adults 16+ (Q4 2000, 2133) (Q4 2001, 2159) (Q4 2002, 2138), (Q4 2003, 2150) (Q4 2004, 2131) (Q4 2005, 2214) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
Question: Do you or does anyone in your household have access to the internet/ Worldwide Web at HOME (via any device, e.g. PC, laptop, mobile phone etc.)?

# Level of awareness of broadband connection speed



Source: Ofcom Technology Tracker, data as at Q1 2008-2014; H1 2015  
 Base: All adults 16+ with broadband as their main connection at home (Q1 2008, 3219) (Q1 2009, 3702) (Q1 2010, 5941) (Q1 2011, 2481) (Q1 2012, 2726) (Q1 2013, 2548) (Q1 2014, 2601) (H1 2015, 2781)  
 Question: What was the advertised speed of your fixed broadband home internet connection when you took up your service?  
 Question: What is the actual speed of your fixed broadband home internet connection?  
 \* Data for 2012-2015 based on all adults aged 16+ in a household with fixed broadband (data prior to 2012 based on all adults aged 16+ with broadband as their main connection at home)

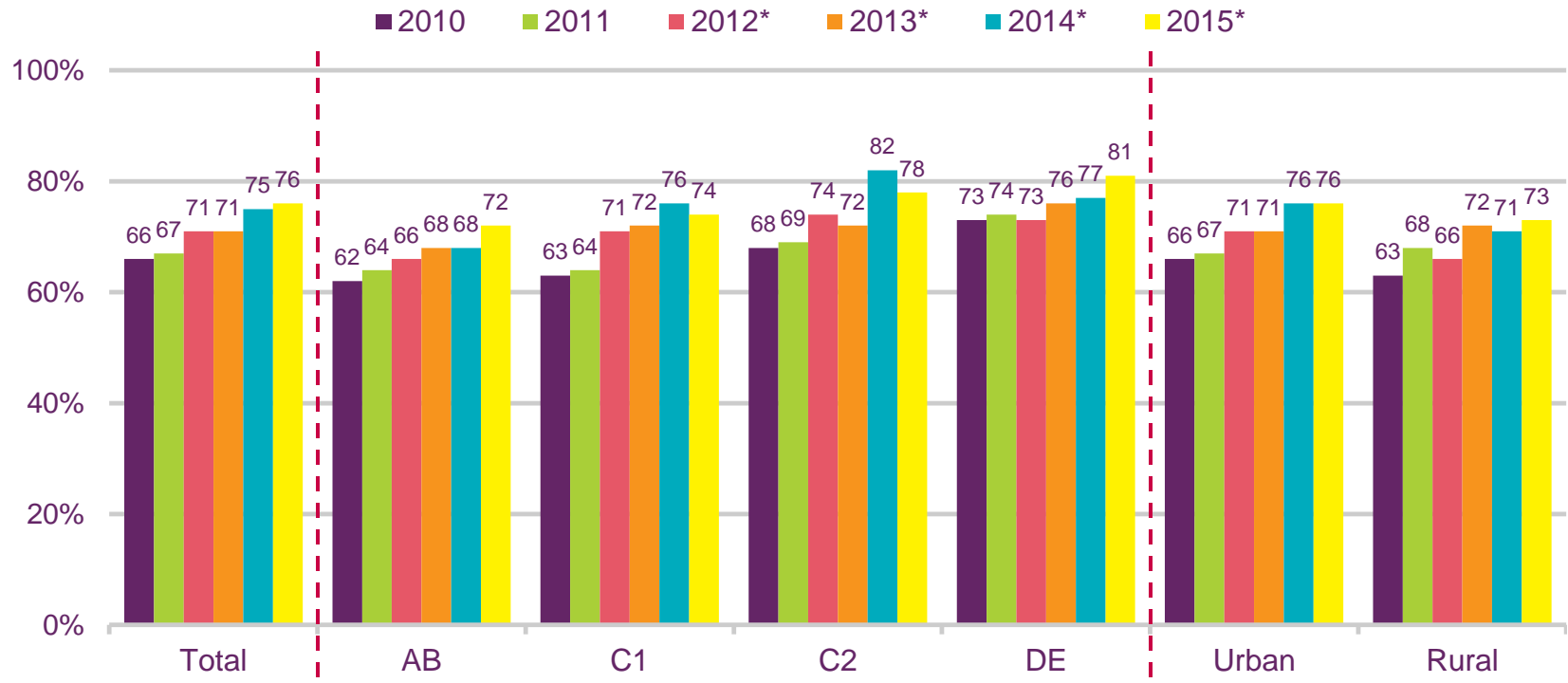
# Those unaware of broadband connection speed, by age and gender



Source: Ofcom Technology Tracker, data as at Q1 2010-2014; H1 2015  
 Base: All adults 16+ with broadband as their main connection (Q1 2010, 5941) (Q1 2011, 2481) (Q1 2012, 2726) (Q1 2013, 2548) (Q1 2014, 2601) (H1 2015, 2781)  
 Question: What is the actual speed of your main home internet connection?  
 \* Data for 2012-2015 based on all adults aged 16+ in a household with fixed broadband (data prior to 2012 based on all adults aged 16+ with broadband as their main connection at home)

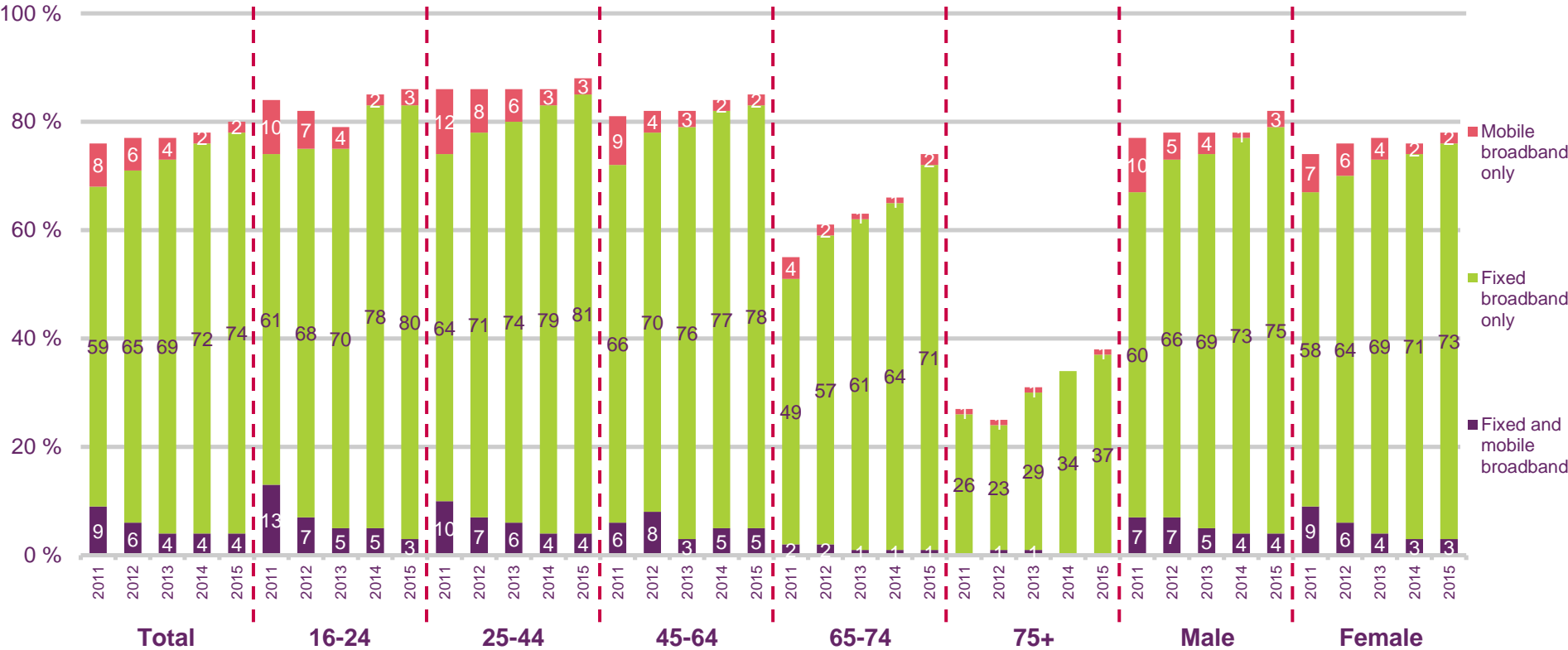


# Those unaware of broadband connection speed, by socio-economic group and urbanity



Source: Ofcom Technology Tracker, data as at Q1 2010-2014; H1 2015  
 Base: All adults 16+ with broadband as their main connection (Q1 2010, 5941) (Q1 2011, 2481) (Q1 2012, 2726) (Q1 2013, 2548) (Q1 2014, 2601) (H1 2015, 2781)  
 Question: What is the actual speed of your main home internet connection?  
 \* Data for 2012-2015 based on all adults aged 16+ in a household with fixed broadband (data prior to 2012 based on all adults aged 16+ with broadband as their main connection at home)

# Age and gender profile of those who have broadband access at home



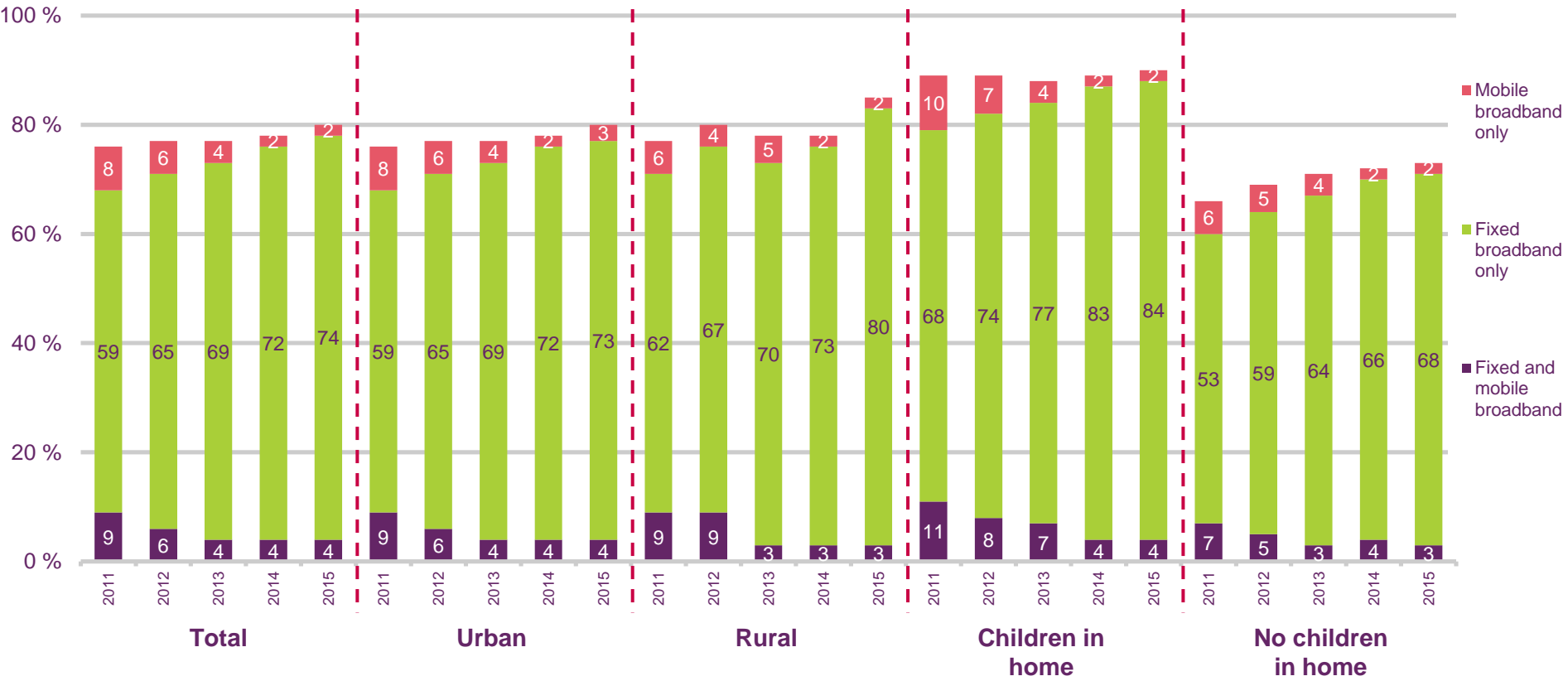
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 Base: All adults 16+ (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Which of these methods does your household use to connect to the Internet at home?

# Socio-economic profile of those who have broadband access at home



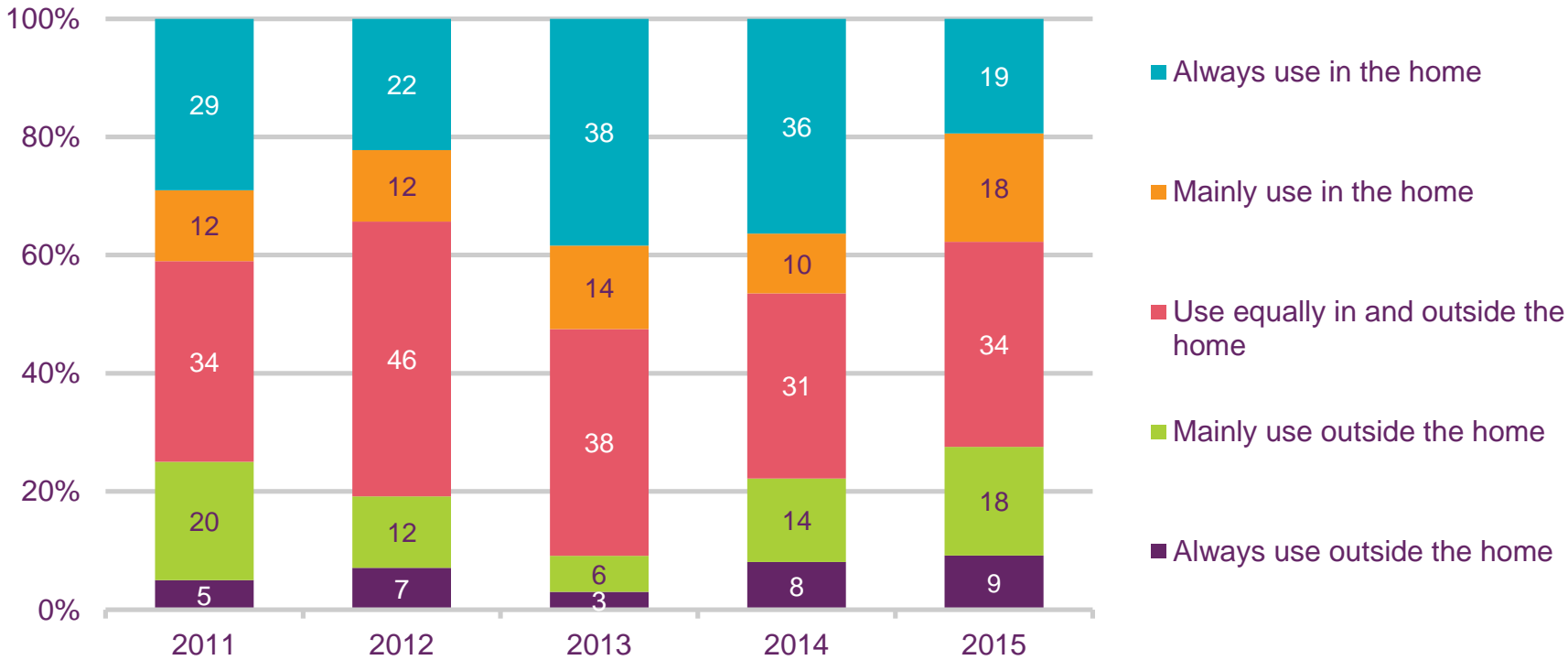
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 Question: Which of these methods does your household use to connect to the Internet at home?

# Profiles of those who have broadband access at home, by urbanity and presence of children in the household



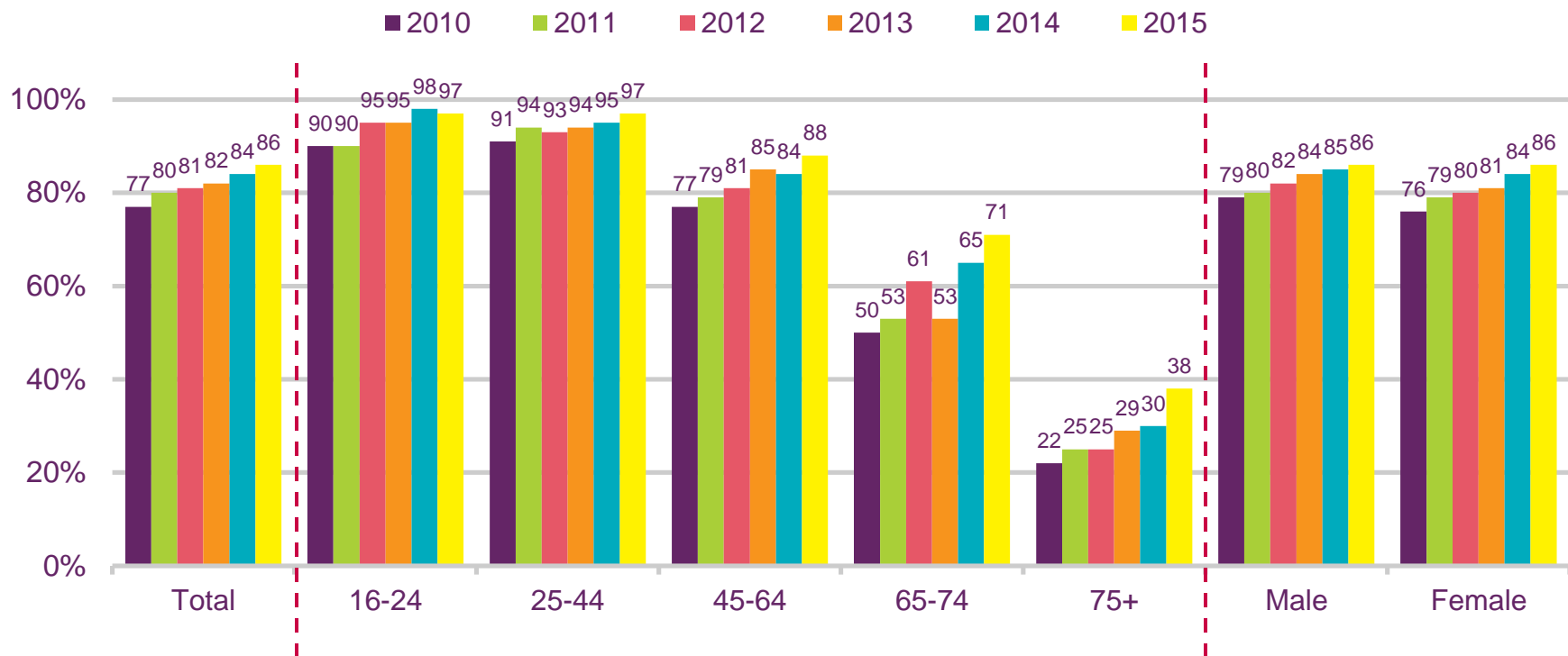
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# Places where mobile broadband is used



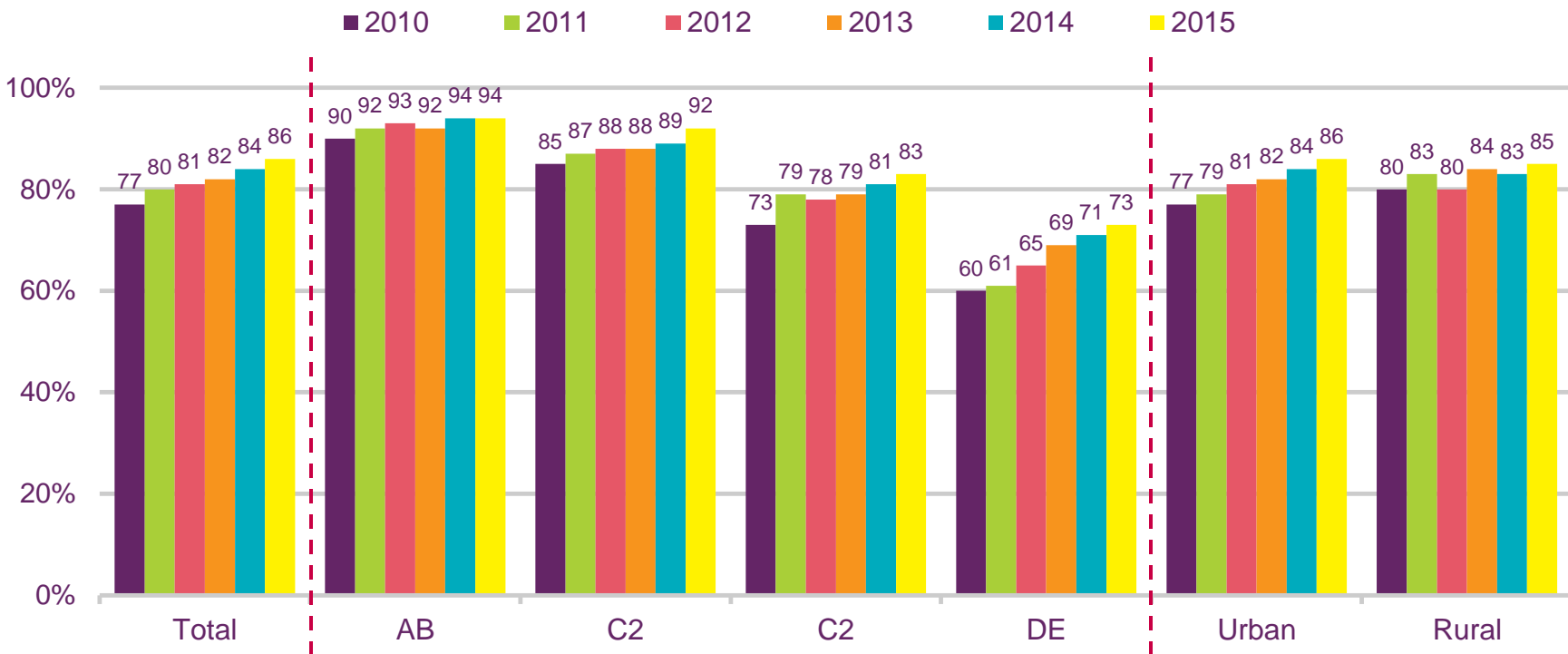
Source: Ofcom Technology Tracker, data as at Q1 2011-2014; H1 2015  
 Base: All adults 16+ who use mobile broadband to access the internet (Q1 2011, 471) (Q1 2012, 394) (Q1 2013, 173) (Q1 2014, 220) (H1 2015, 193)  
 Question: Which one of these best describes where you use mobile broadband to access the internet?

# Use of the internet anywhere, by age and gender



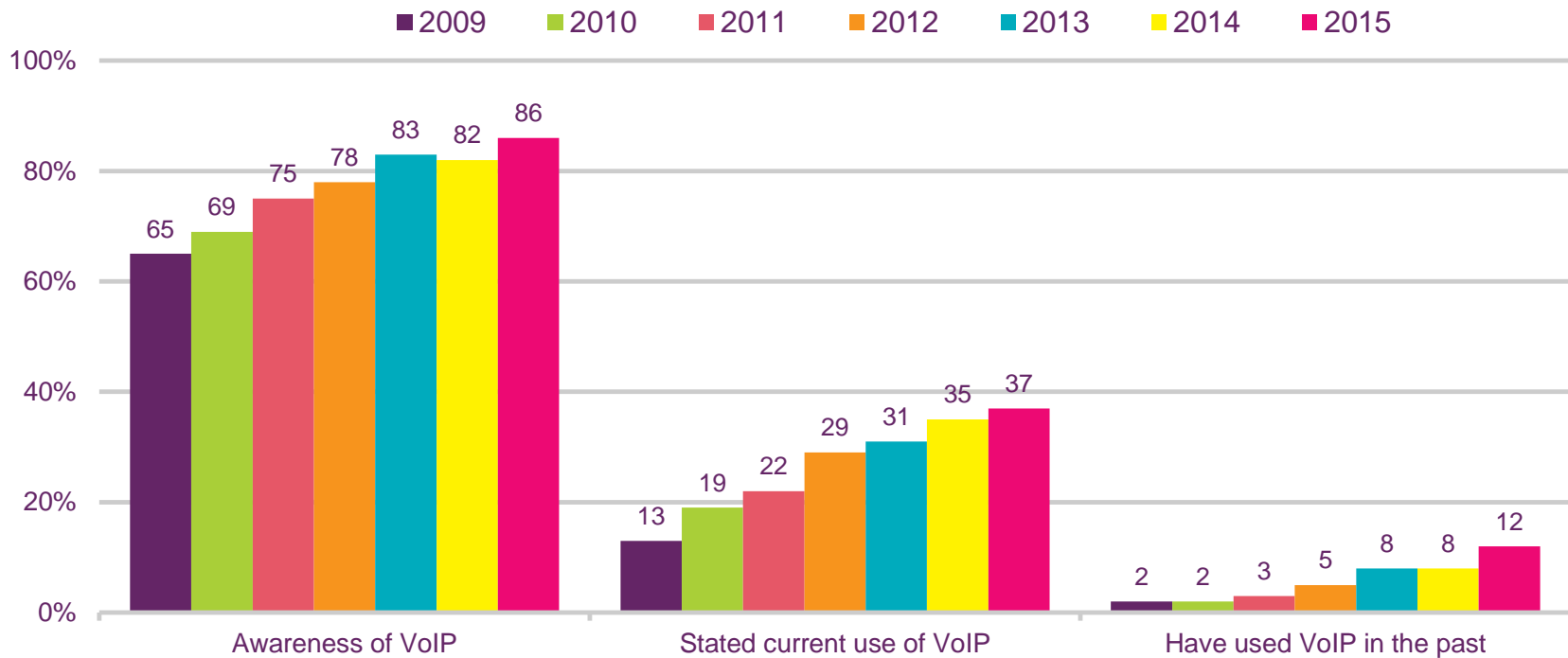
Source: Ofcom Technology Tracker, data as at Q1 2010-2014; H1 2015  
 Base: All adults 16+ (Q1 2010, 9013) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750) (Q1 2014, 3740) (H1 2015, 3756)  
 Question: Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?  
 Question: Do you ever go online anywhere other than in your home at all (via any device, e.g. PC, laptop, mobile phone, etc.)? And do you personally use the internet at home?

# Use of the internet anywhere, by socio-economic group and urbanity



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# Awareness and current / previous use of VoIP



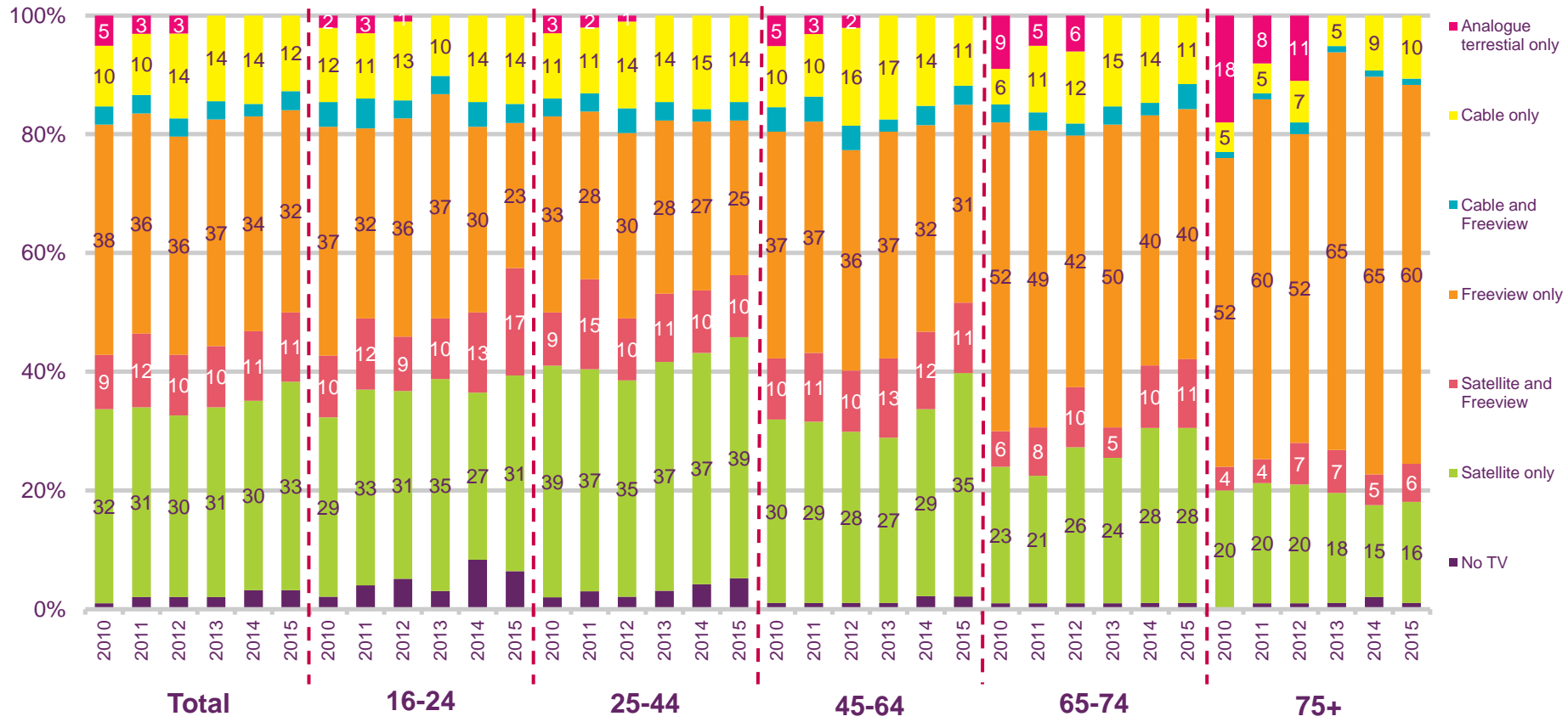
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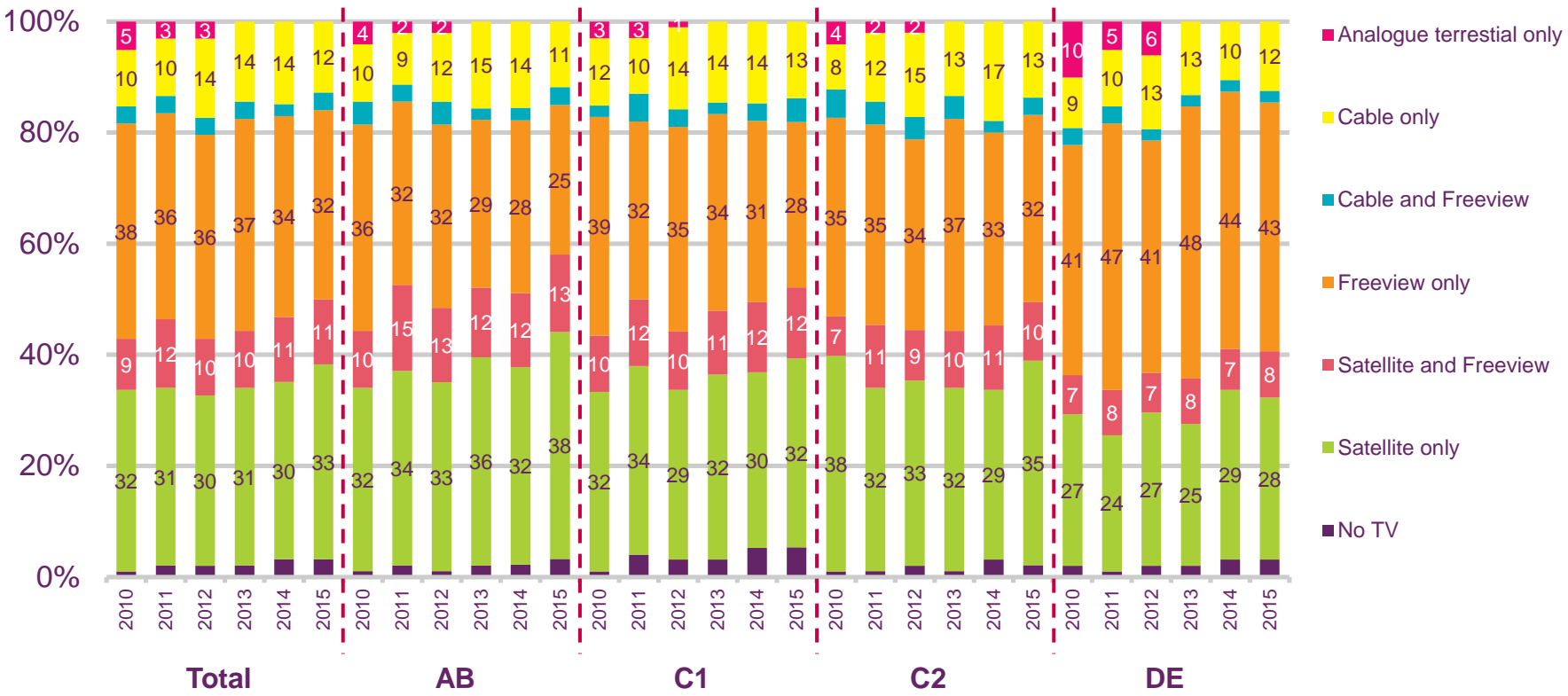
# Broadcasting

# Trend in multi-platform ownership, by age



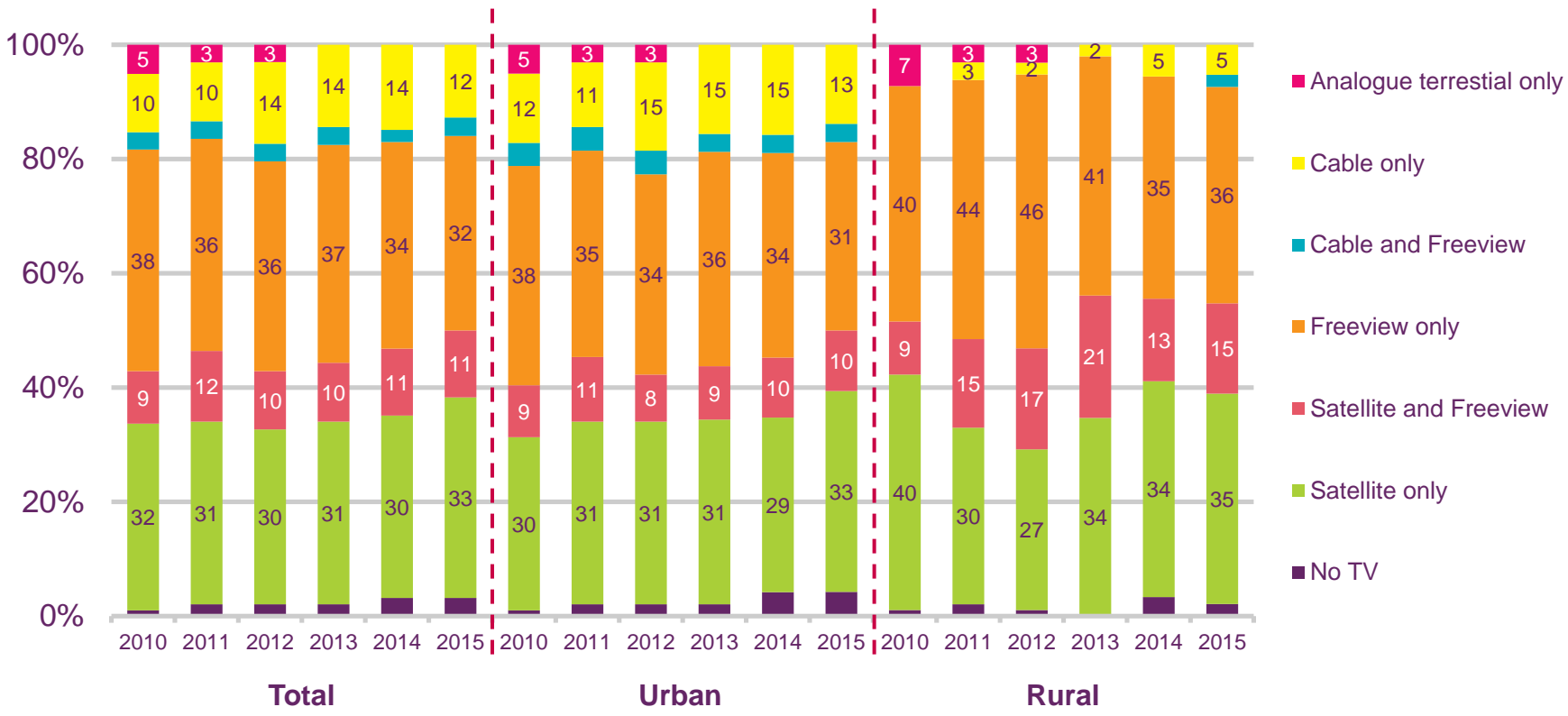
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 Question: Which, if any, of these types of television does your household receive at the moment?  
 Note: Remaining percentages are those who own other types of TV (e.g. via Broadband DSL)

# Trend in multi-platform ownership, by socio-economic group



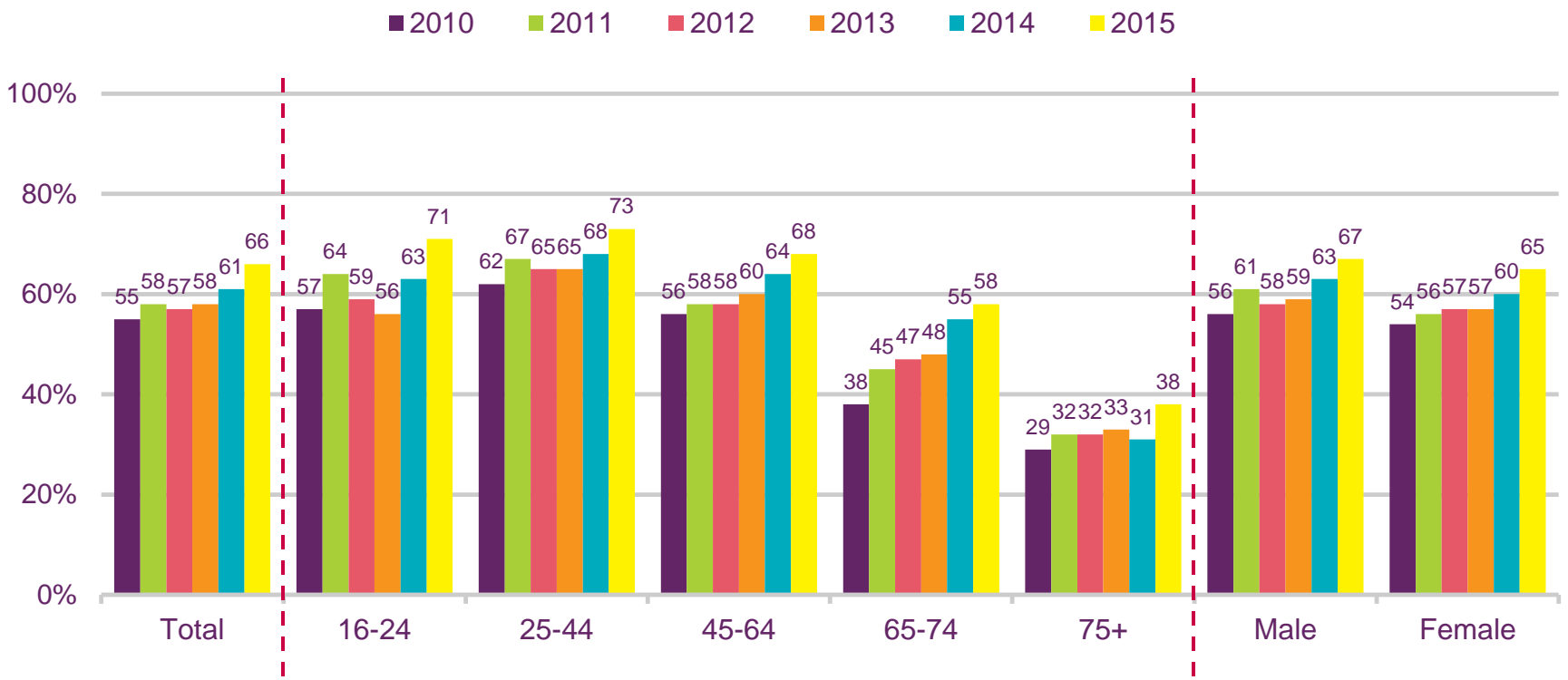
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 Question: Which, if any, of these types of television does your household receive at the moment?  
 Note: Remaining percentages are those who own other types of TV (e.g. via Broadband DSL)

# Trend in multi-platform ownership, by urbanity



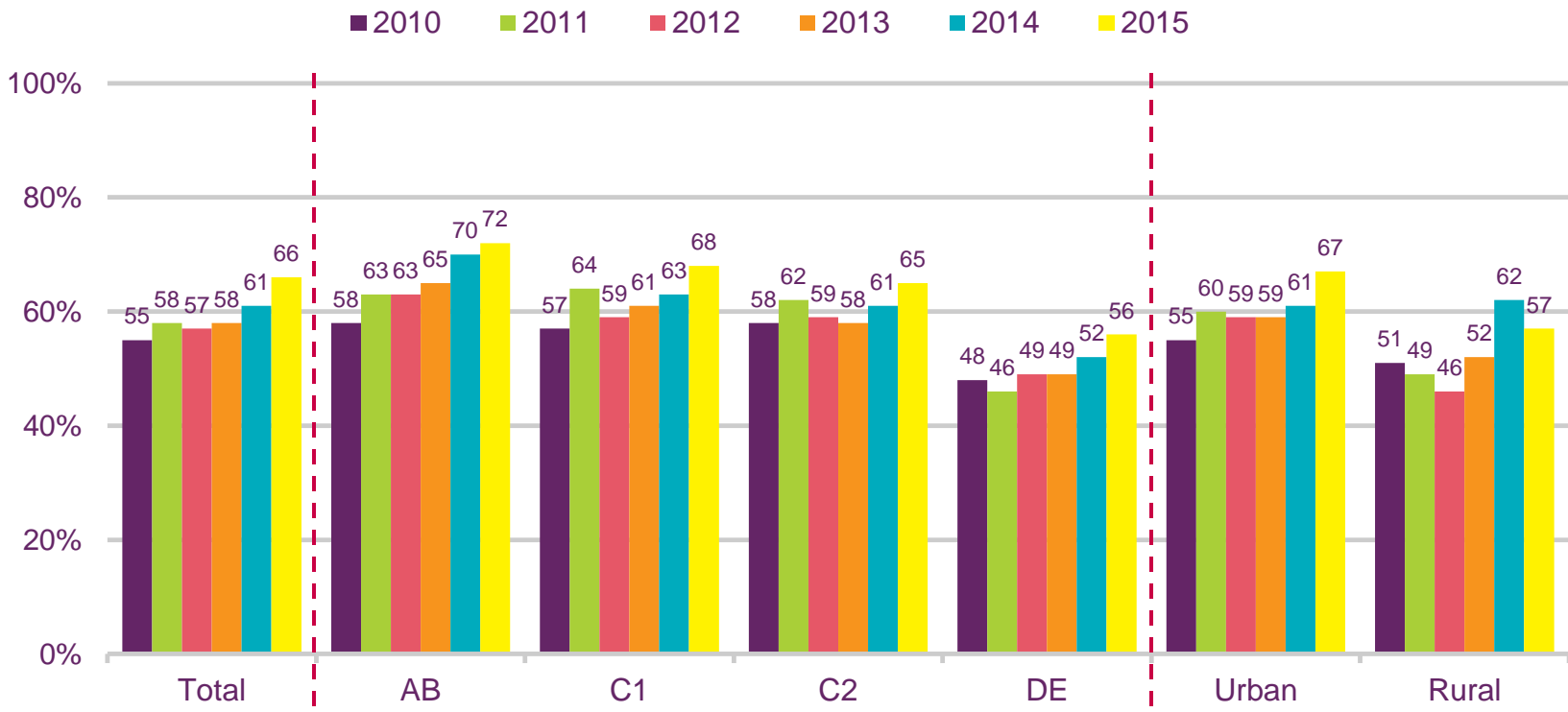
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 Question: Which, if any, of these types of television does your household receive at the moment?  
 Note: Remaining percentages are those who own other types of TV (e.g. via Broadband DSL)

# Age and gender profile of consumers receiving pay TV



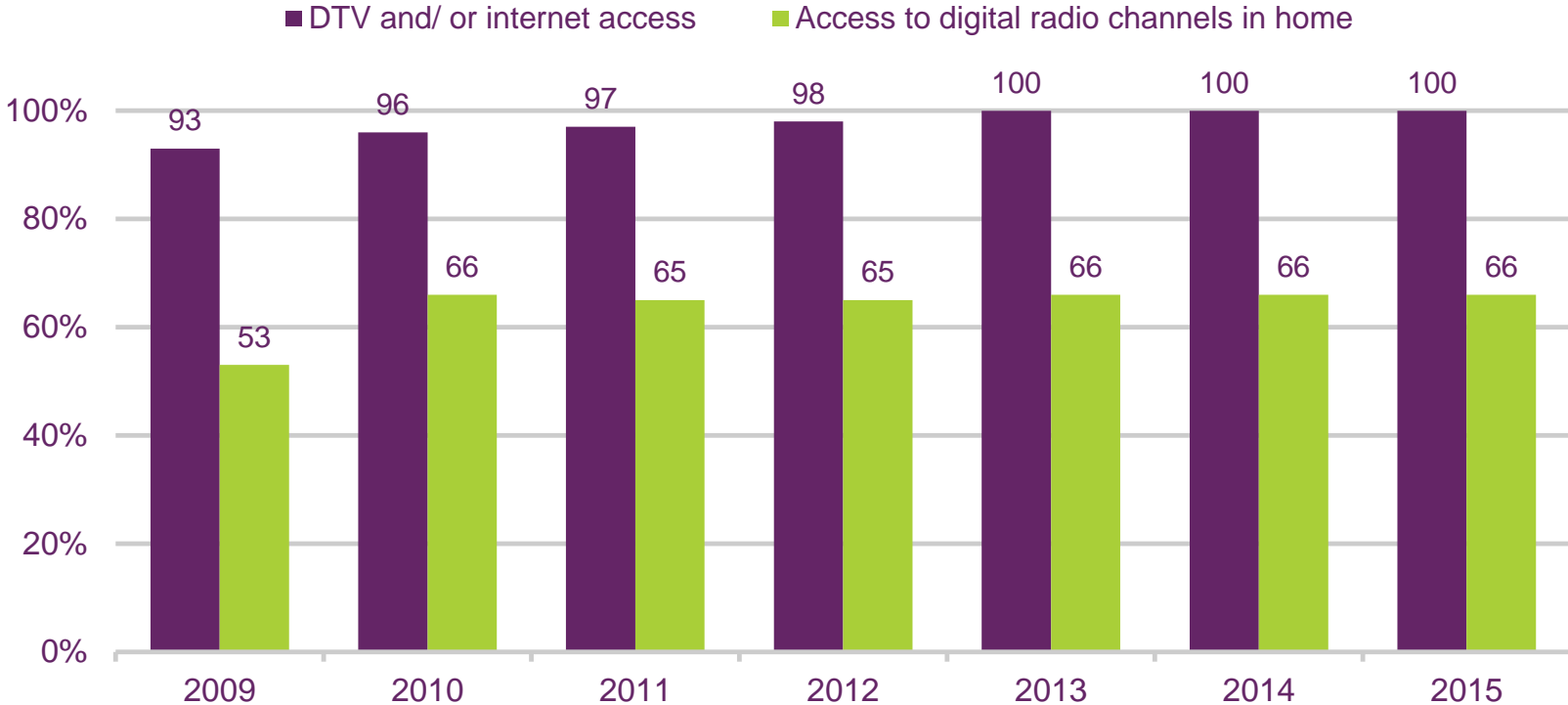
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# Socio-economic group and urbanity profile of consumers receiving pay TV



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 Question: Which, if any, of these types of television does your household receive at the moment?

# Access to digital radio services in the home



Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015  
Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

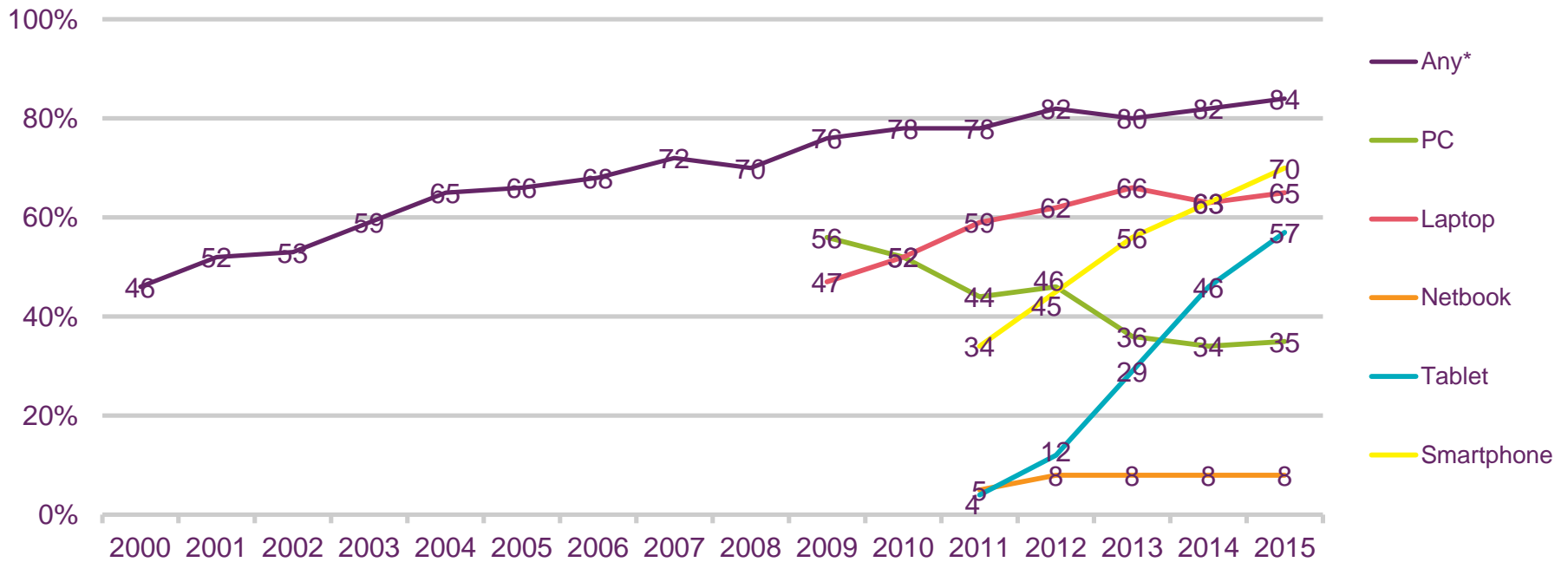
# Ownership of connected devices



# Ownership of connected devices in the home



Proportion of households/ adults (%)

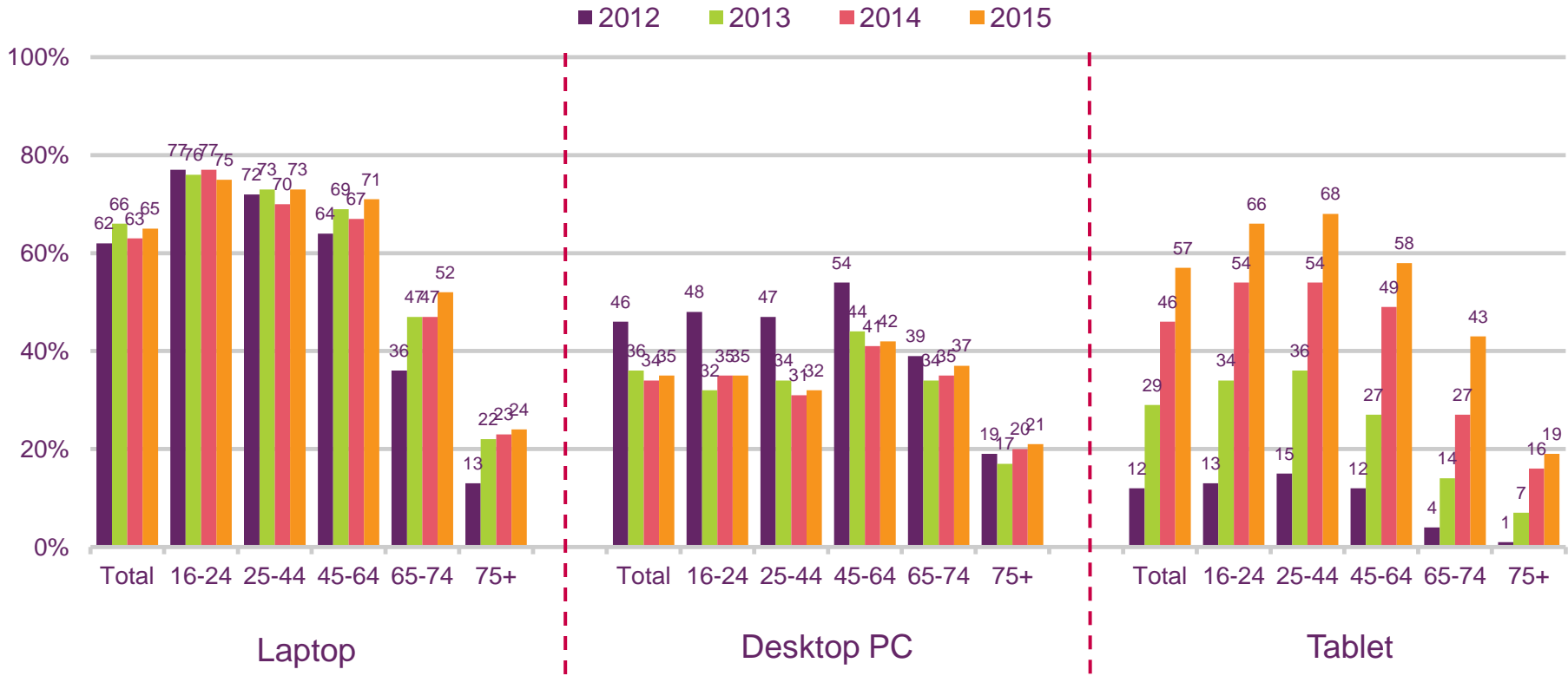


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Base: All adults 16+ (Q4 2000, 2133) (Q4 2001, 2159) (Q4 2002, 2138), (Q4 2003, 2150) (Q4 2004, 2131) (Q4 2005, 2214) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

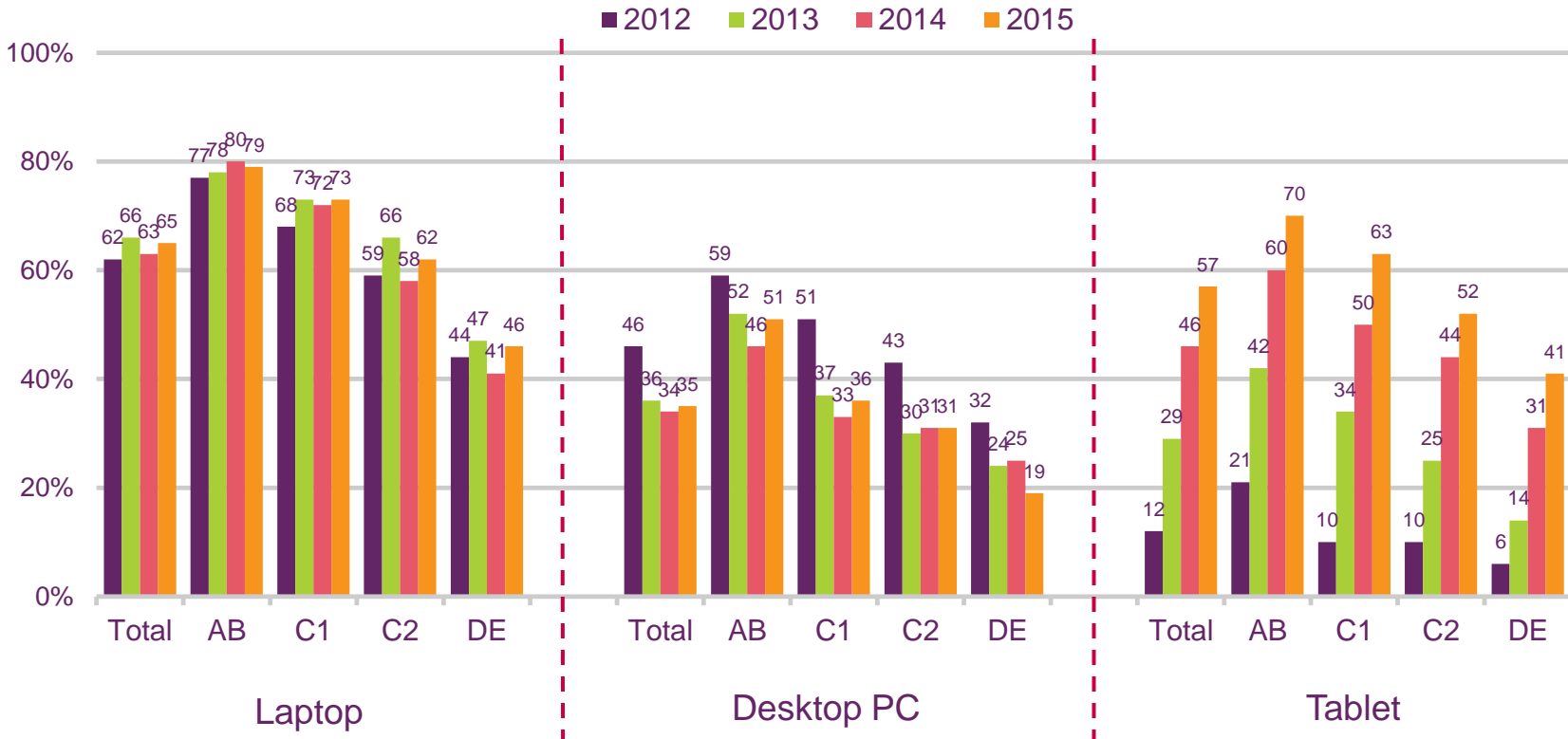
\* Data for 'Any' for 2000-2010 refers to PC or laptop computers. Data for 'Any' for 2011-2015 also includes netbook or tablet computers but not smartphones.

# Age profile of laptop, PC and tablet users



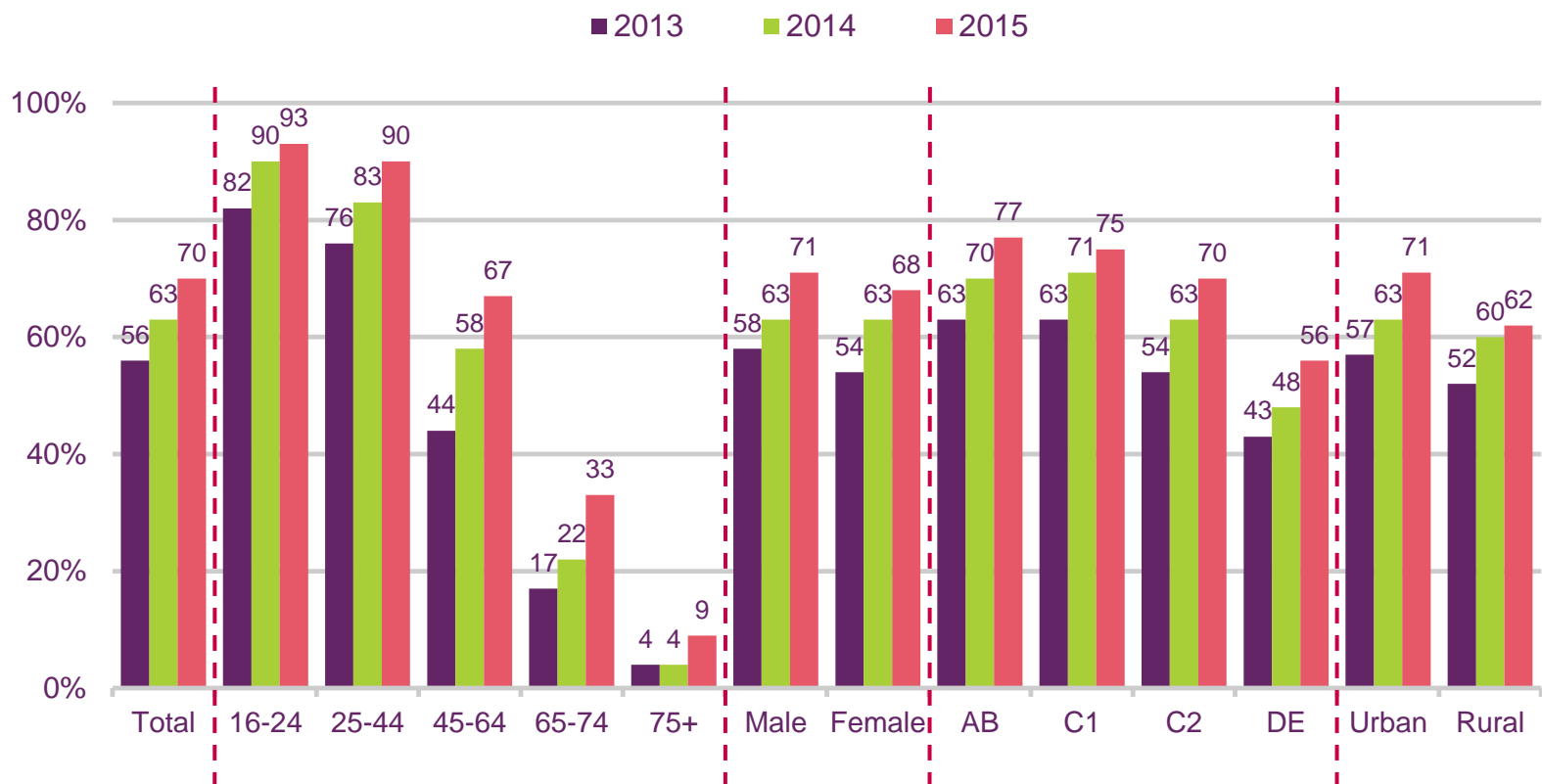
Source: Ofcom Technology Tracker, data as at Q2 2012-2014; H2 2015  
 Base: All adults 16+ (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Does your household have a PC, laptop, netbook or tablet computer?

# Socio-economic group profile of laptop, PC and tablet users



Source: Ofcom Technology Tracker, data as at Q2 2012-2014; H2 2015  
 Base: All adults 16+ (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Does your household have a PC, laptop, netbook or tablet computer?

# Smartphone owners by age, gender, socio-economic and urbanity



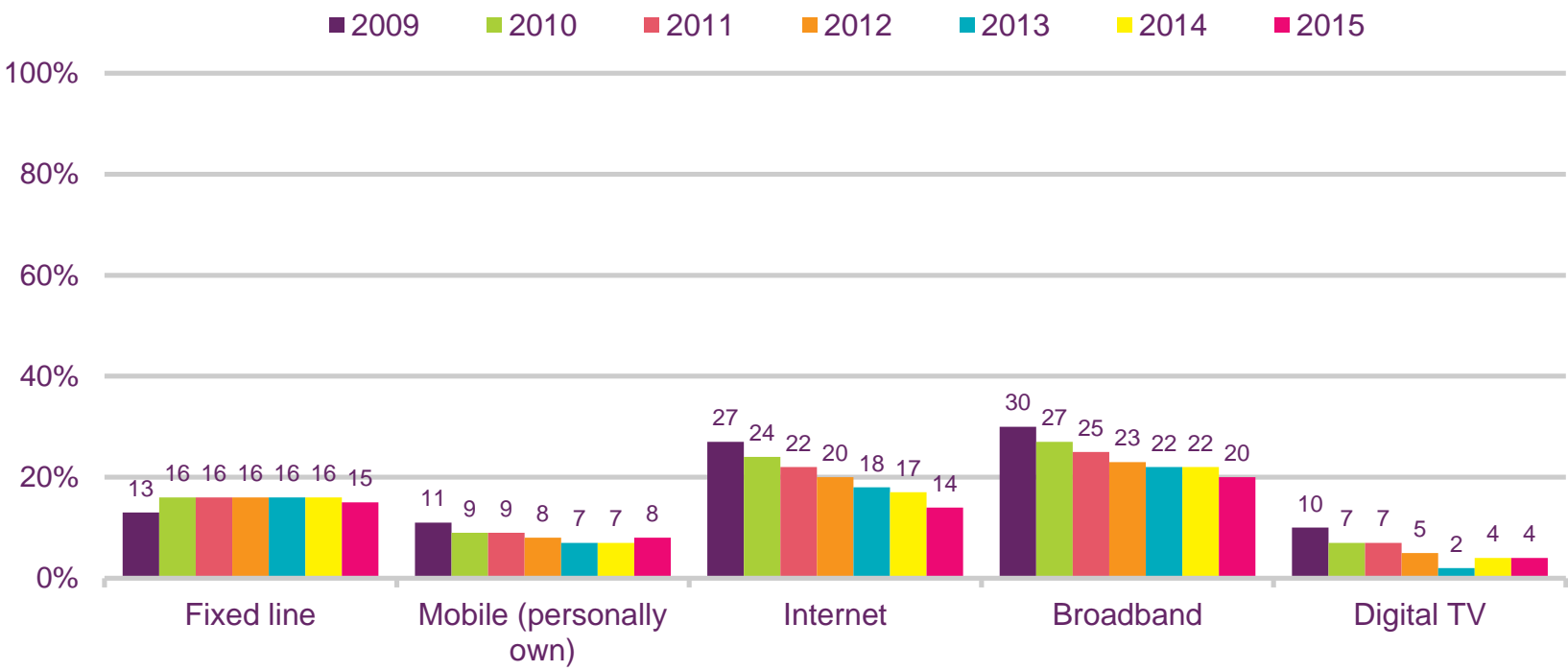
Source: Ofcom Technology Tracker, data as at Q2 2013-2014; H2 2015

Base: All adults 16+ (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

Question: 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.

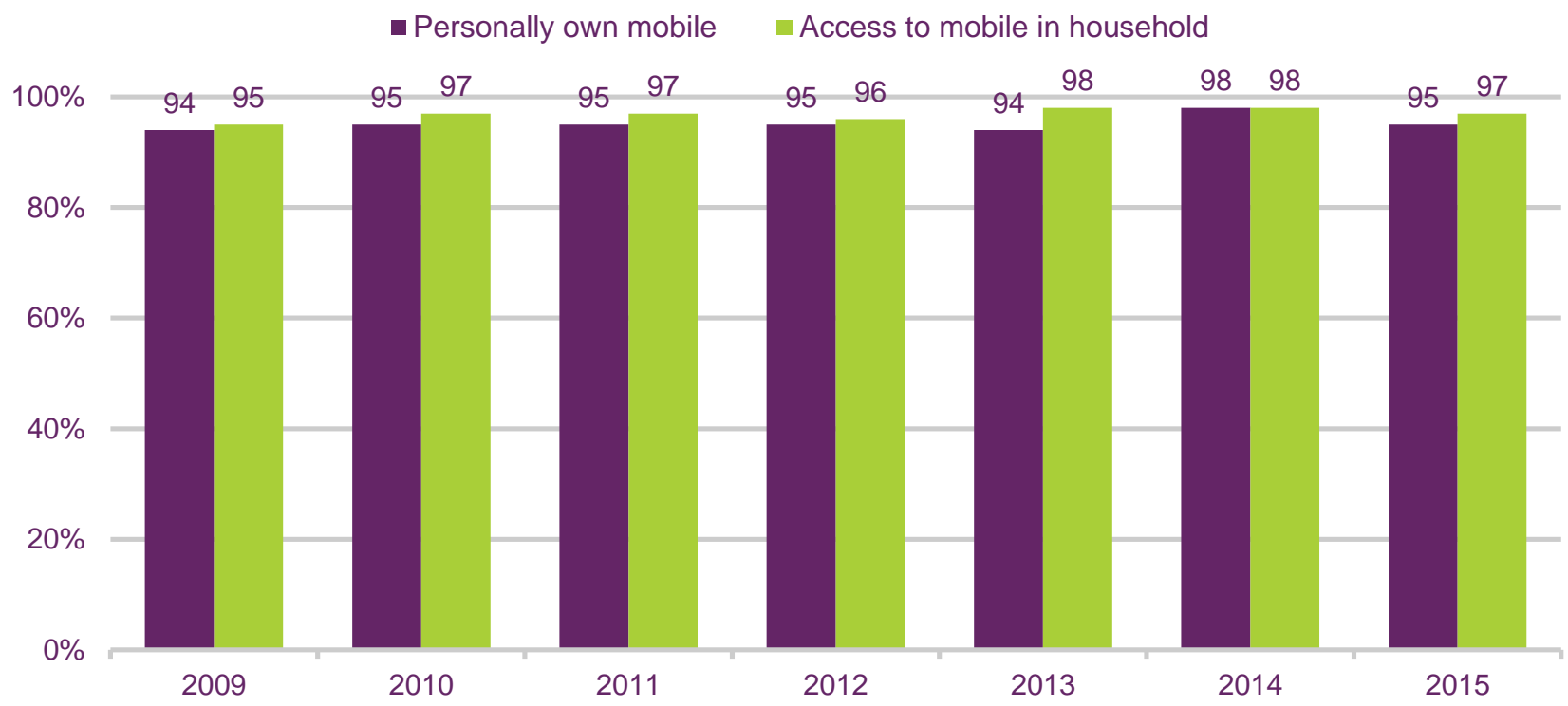
# Non-ownership of communications services

# Non-ownership of communications services



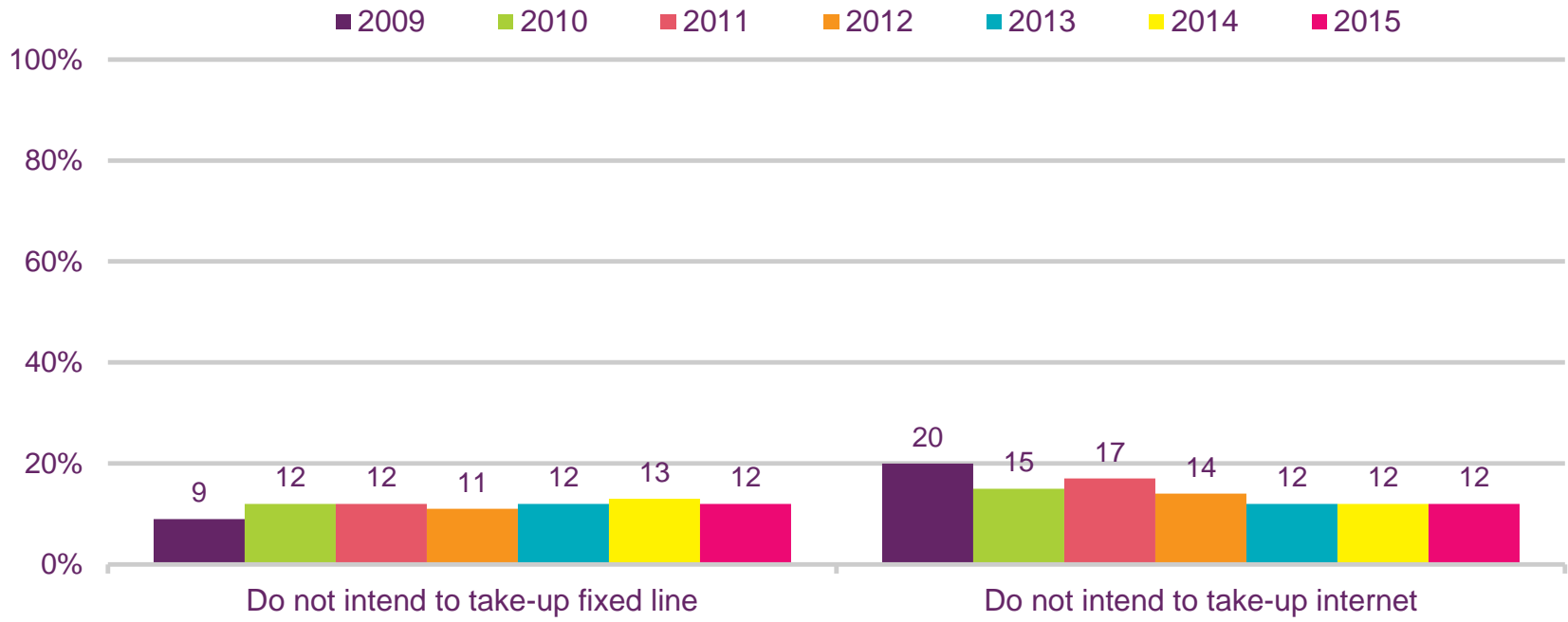
Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015  
 Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)

# Access to mobile services among those who do not have access to a fixed line



Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015  
Base: All adults 16+ who do not own a fixed-line (Q2 2009, 274) (Q2 2010, 340) (Q2 2011, 400) (Q2 2012, 446) (Q2 2013, 458) (Q2 2014, 460) (H2 2015, 460)

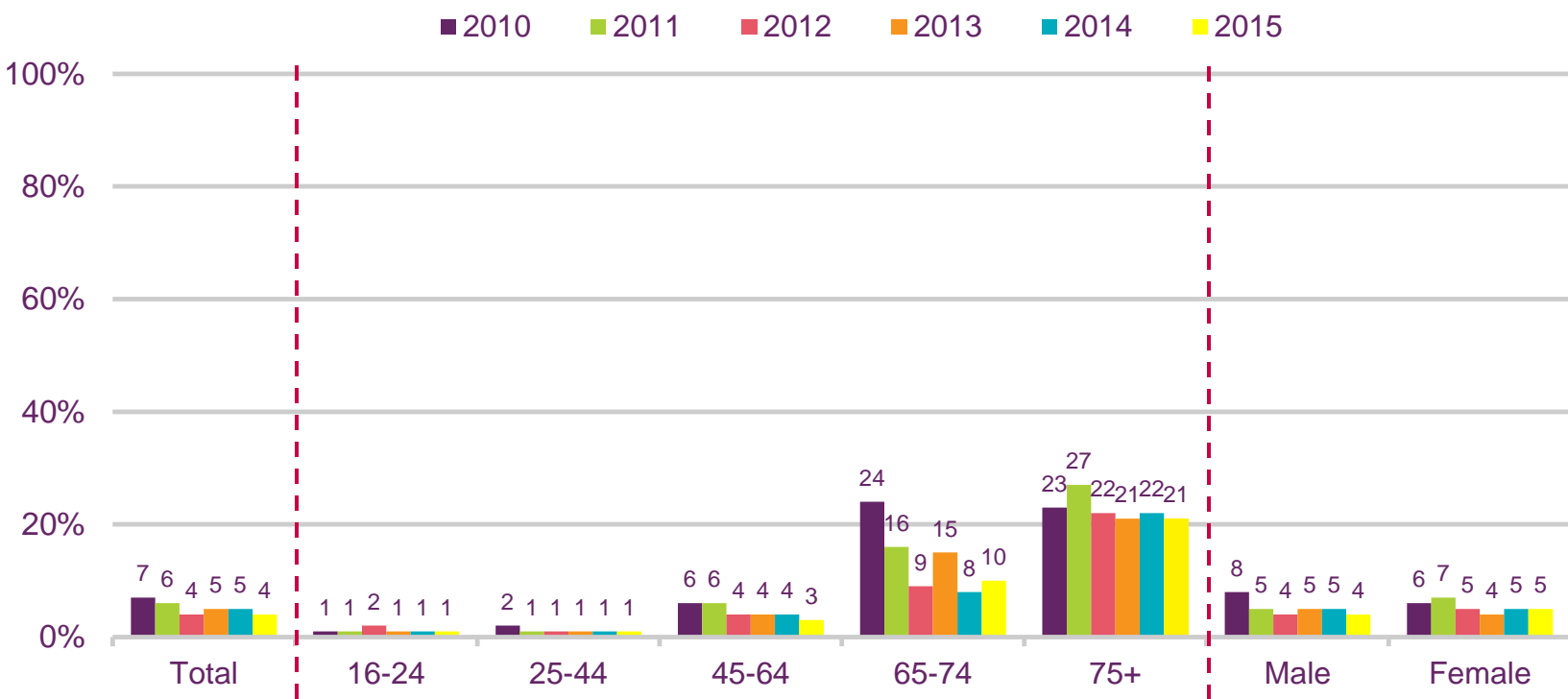
# Do not intend to take up communications services in the next 12 months



Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015  
 Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: How likely is it that your household will get a landline phone at home in the next 12 months? / Question: How likely are you to get internet access at home in the next 12 months?  
 \*Data for mobile and digital TV not available in 2015

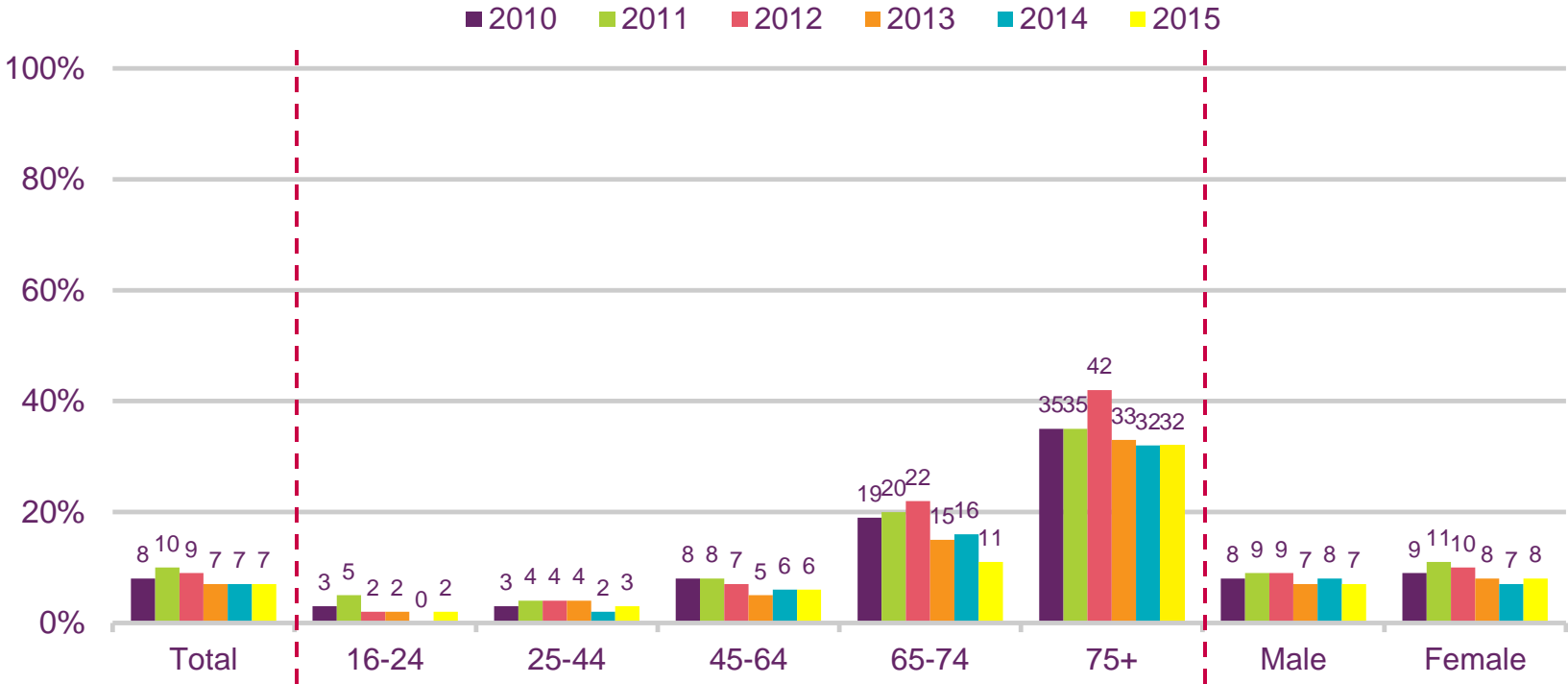


# Voluntary (only) non-ownership of internet services, by age and gender



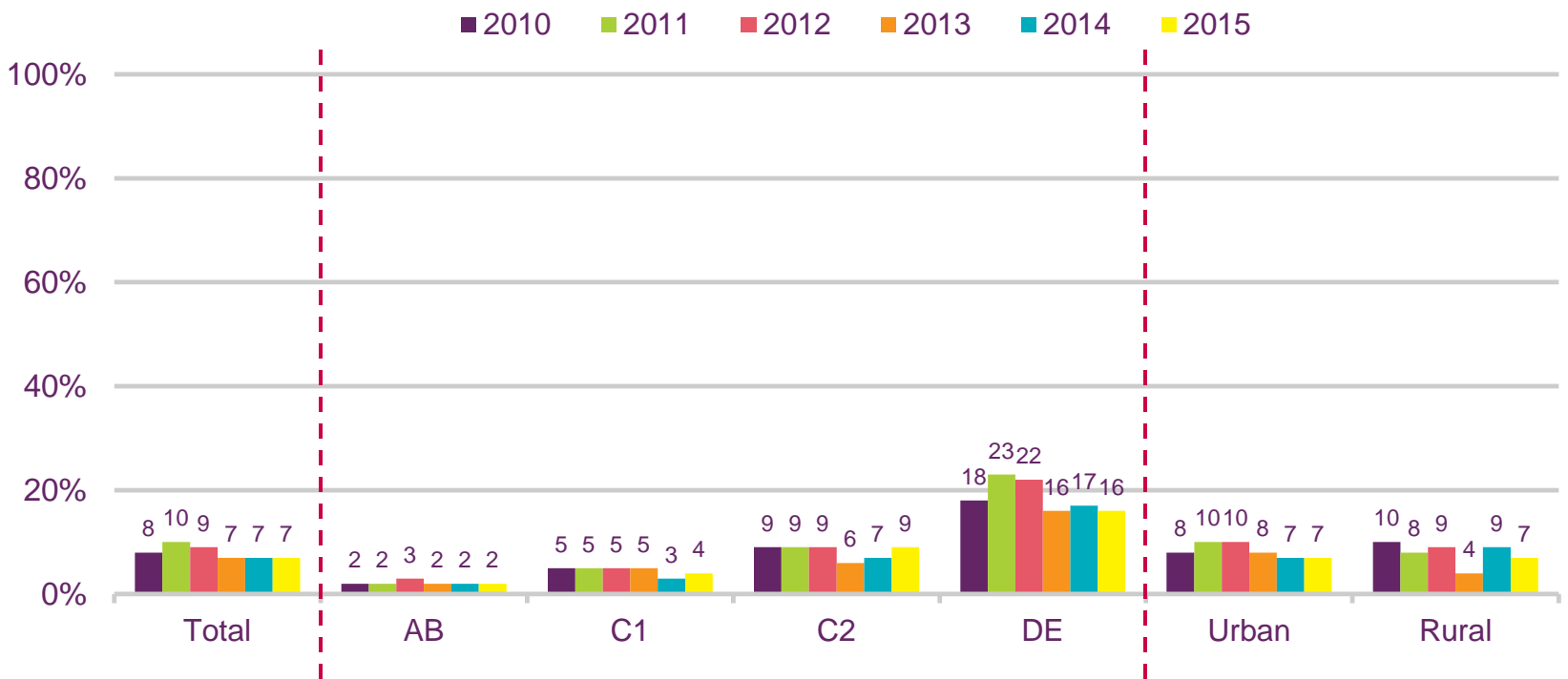
Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Why are you unlikely to get internet access at home in the next 12 months?

# Involuntary non-ownership of internet services, by age and gender



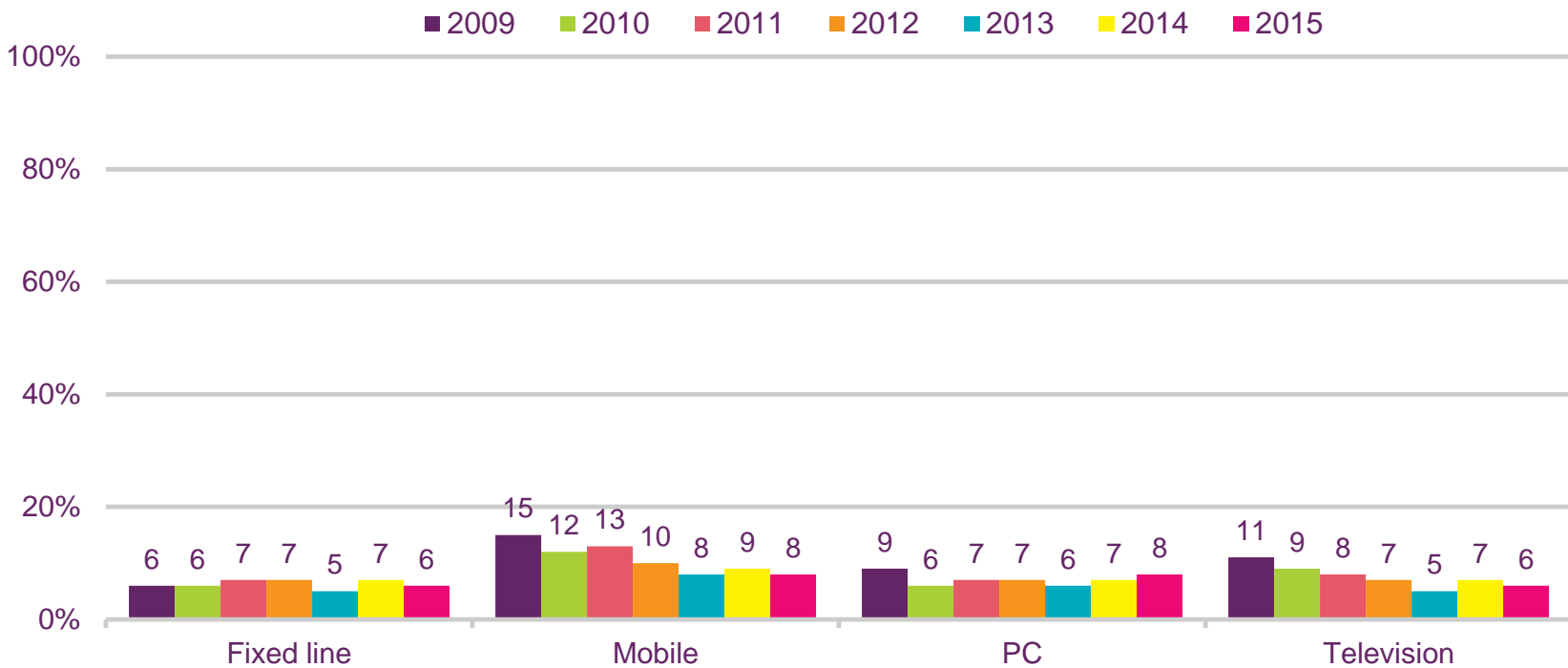
Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Why are you unlikely to get internet access at home in the next 12 months?

# Involuntary non-ownership of internet services, by socio-economic group and urbanity



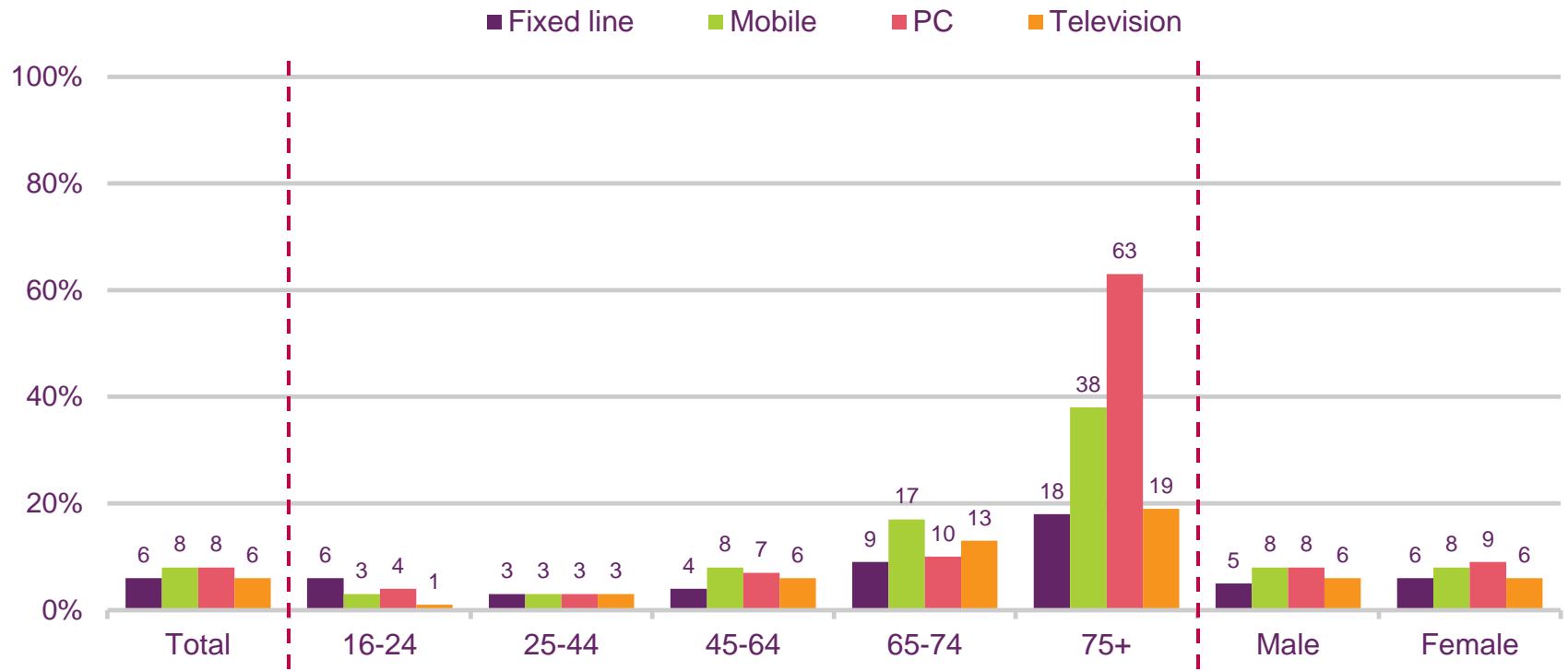
Source: Ofcom Technology Tracker, data as at Q2 2010-2014; H2 2015  
 Base: All adults 16+ (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879) (Q2 2014, 2877) (H2 2015, 2863)  
 Question: Why are you unlikely to get internet access at home in the next 12 months?

# Difficulties using communications services



Source: Ofcom Technology Tracker, data as at Q2 2009-2014; H2 2015  
 Base: All adults 16+ with a fixed line (Q2 2009, 1810) (Q2 2010, 1766) (Q2 2011, 2456) (Q2 2012, 2445) (Q2 2013, 2421) (Q2 2014, 2417) (H2 2015, 2403).  
 All adults 16+ with a mobile (Q2 2009, 1835) (Q2 2010, 1892) (Q2 2011, 2543) (Q2 2012, 2582) (Q2 2013, 2595) (Q2 2014, 2615) (H2 2015, 2570).  
 All adults 16+ with a PC (Q2 2009, 2308) (Q2 2010, 1593) (Q2 2011, 2150) (Q2 2012, 2172) (Q2 2013, 2102) (Q2 2014, 2058) (H2 2015, 2027).  
 All adults 16+ with a television (Q2 2009, 2064) (Q2 2010, 2076) (Q2 2011, 2794) (Q2 2012, 2832) (Q2 2013, 2820) (Q2 2014, 2770) (H2 2015, 2753).

# Difficulties using various communications services, by age and gender

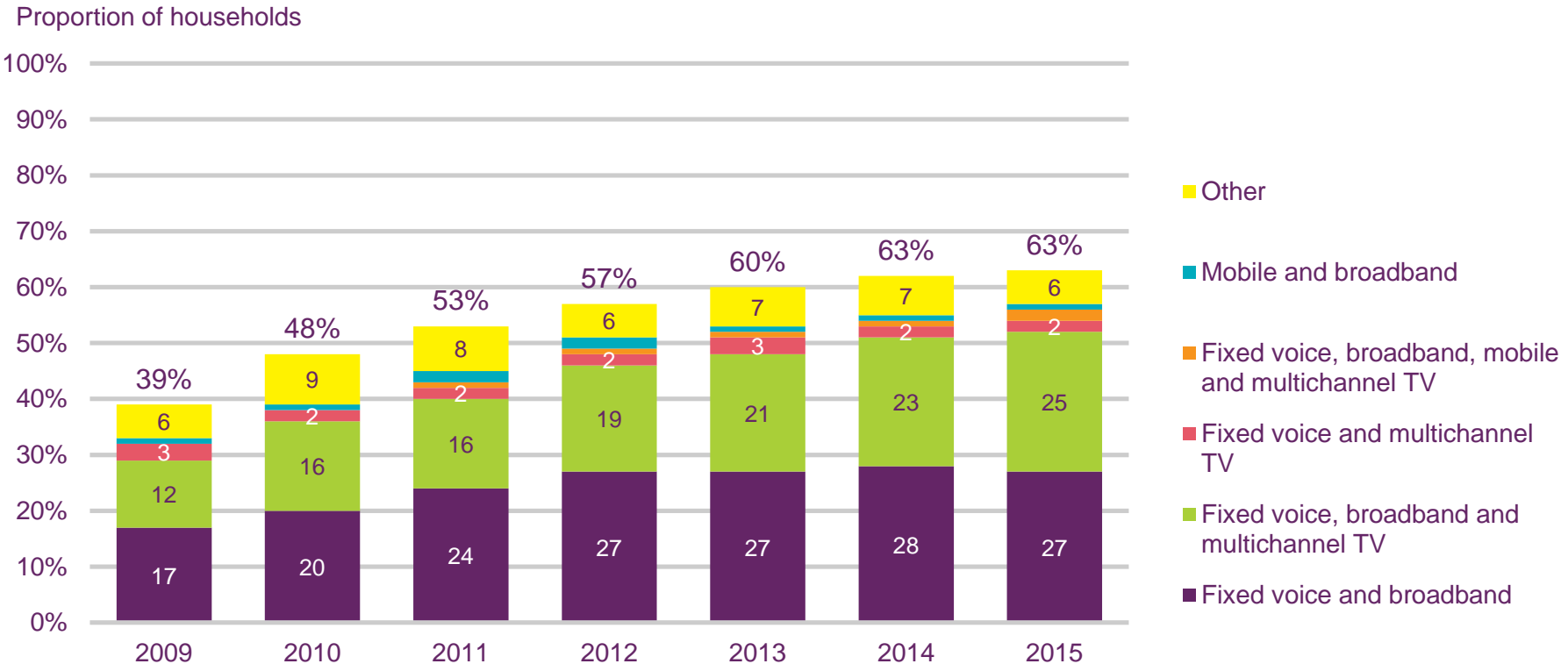


Source: Ofcom Technology Tracker, H2 2015

Base: All adults 16+ with a fixed line (2403); Mobile (2570); PC (2027); Television (2753).

# Bundling

# Trends in purchasing multiple communications services from a single supplier



Source: Ofcom Technology Tracker, data as at Q1 2009-2014; H1 2015  
 Base: All adults 16+ (Q1 2009, 6090) (Q1 2010, 9013) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750) (Q1 2014, 3740) (H1 2015, 3756)  
 Question: Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ Question: Do you receive a discount or special deal for subscribing to this package of services?

# Age, gender and socio-economic profile of consumers with a bundled service



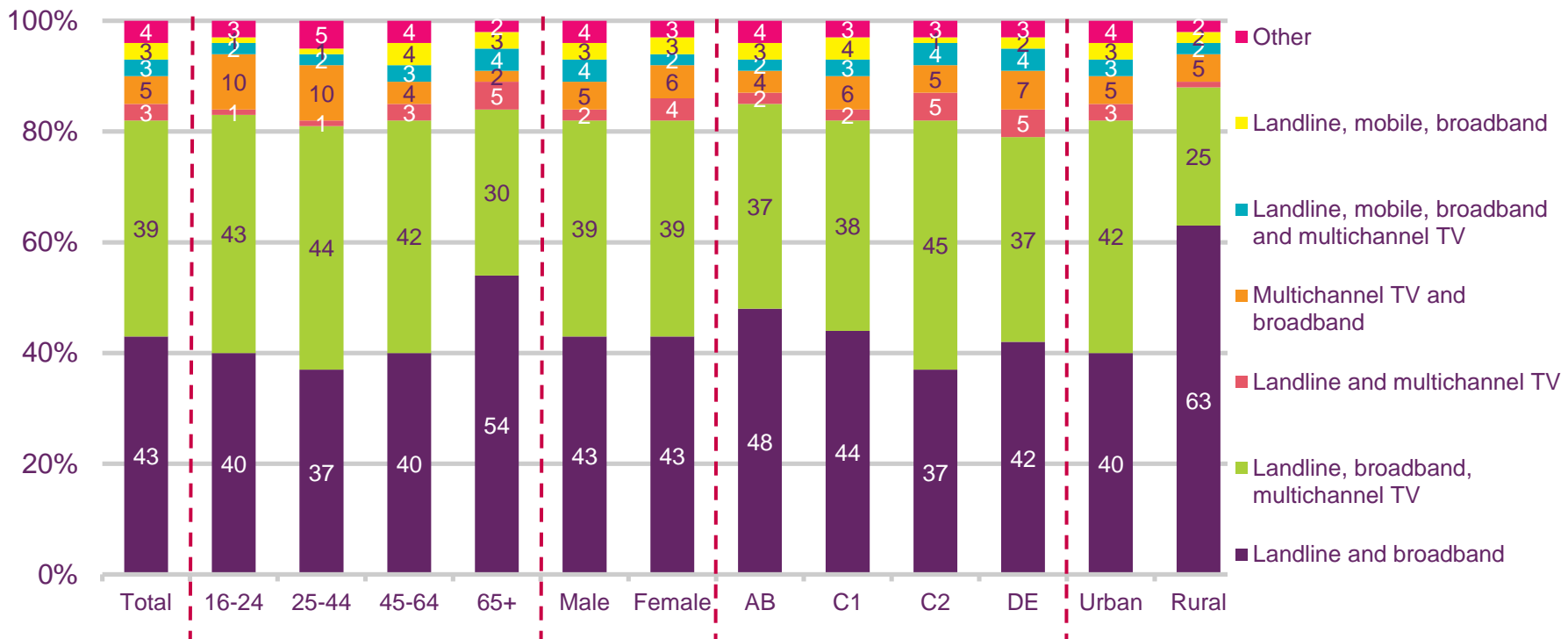
Source: Ofcom Technology Tracker, data as at Q1 2010-2014; H1 2015

Base: All adults aged 16+ (Q1 2010, 9013) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750) (Q1 2014, 3740) (H1 2015, 3756)

Question: Do you receive any of these services as part of an overall deal or package from the same supplier?



# Purchasing of multiple communications services, by age, gender, socio-economic group and urbanity

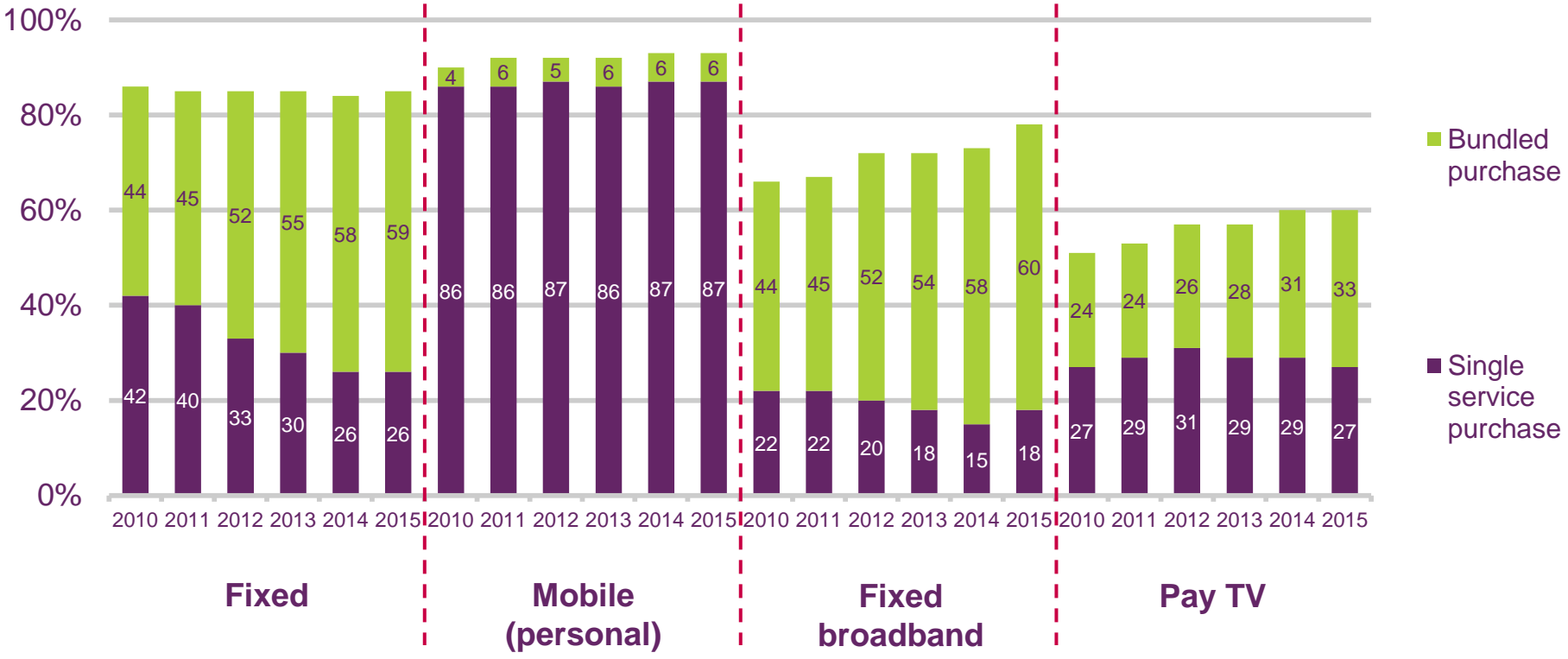


Source: Ofcom Technology Tracker, H1 2015

Base: All adults 16+ who bundle at least two services (2311)

Question: Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ Question: Do you receive a discount or special deal for subscribing to this package of services?

# Trend in purchasing behaviour, by communications market



Source: Ofcom Technology Tracker, data as at Q1/Q3 2010 (Q1 and Q3 rolled data from 2010); Q1 2011-2014; H1 2015  
 Base: Adults 16+ (Q1/Q3 2010, 11098) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750) (Q1 2014, 3740) (H1 2015, 3756)