

Extended chart pack

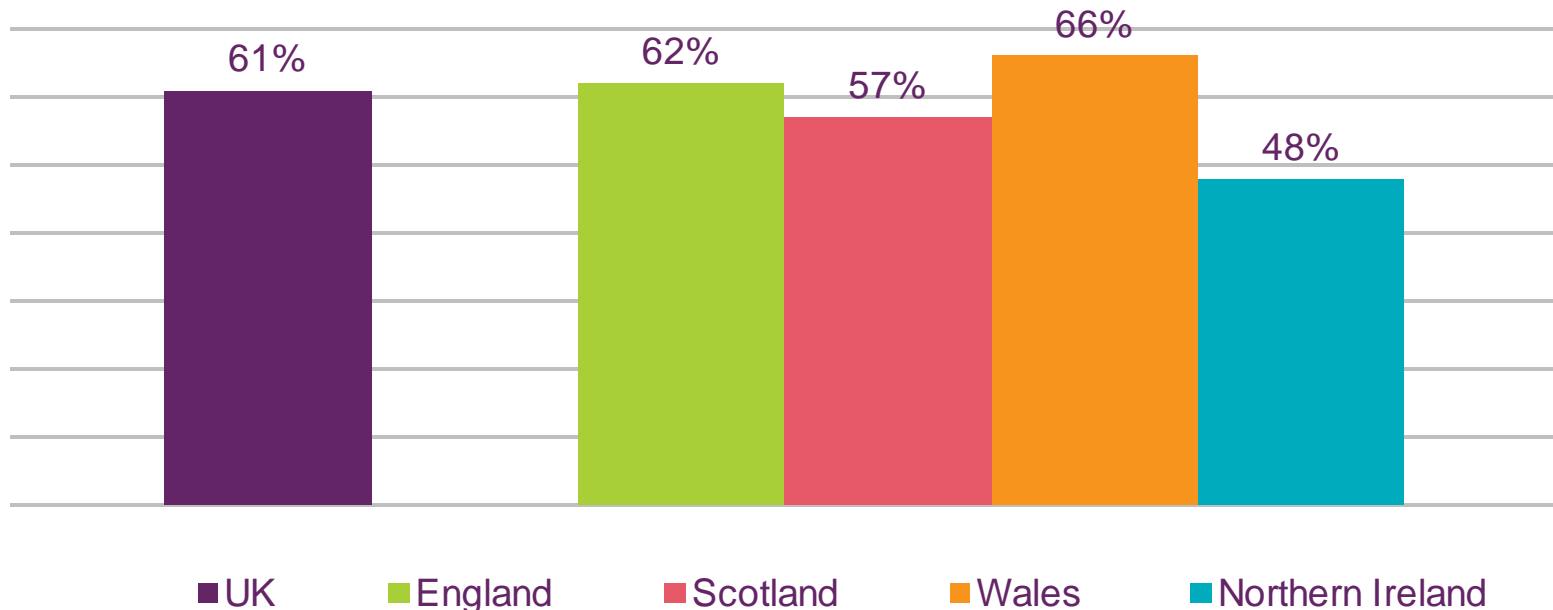
England – The Communications Market Report 2013

1st August 2013

England's communications market

Proportion 'ever' using online government services, by nation

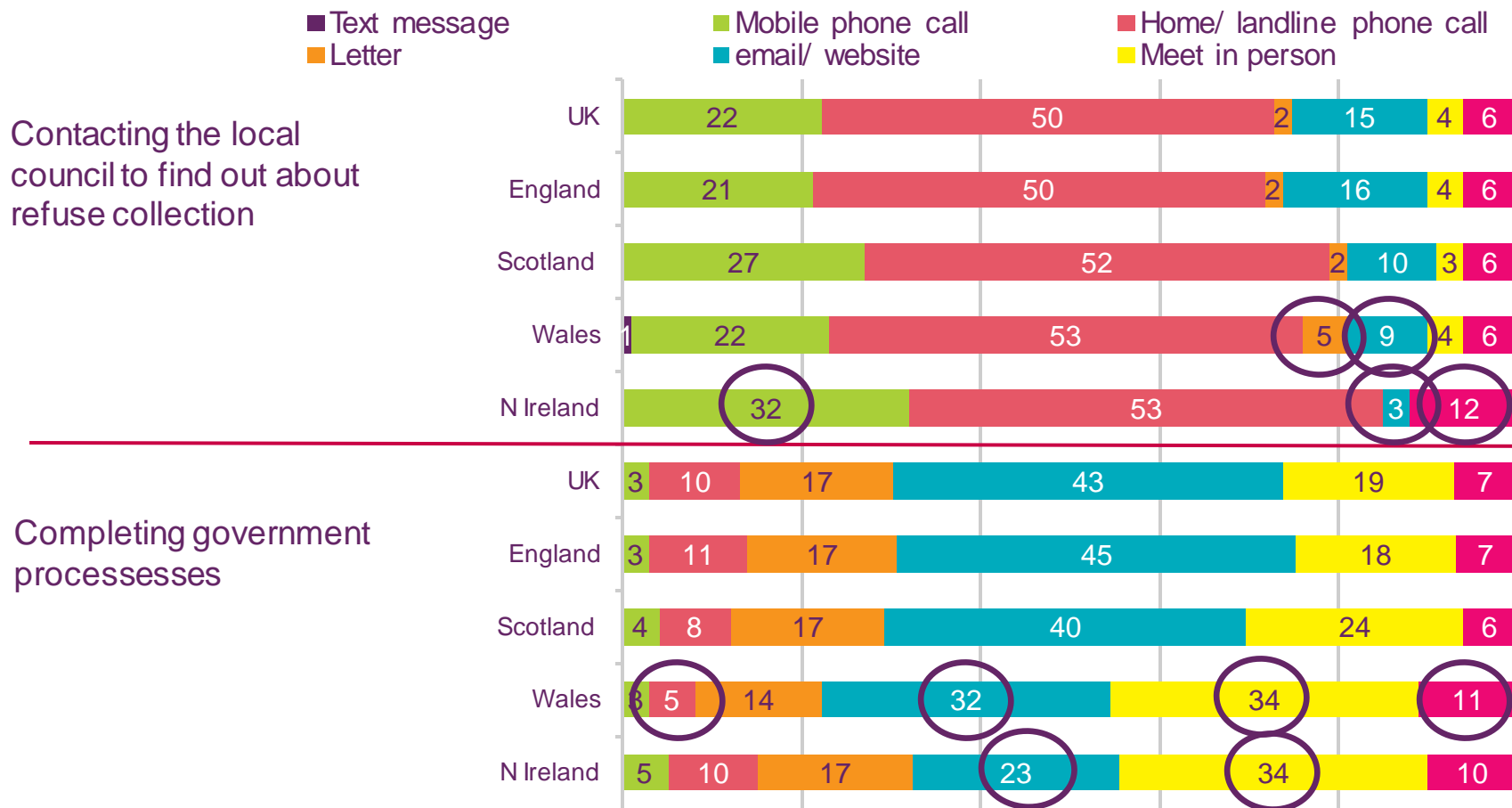
% That use services



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.)

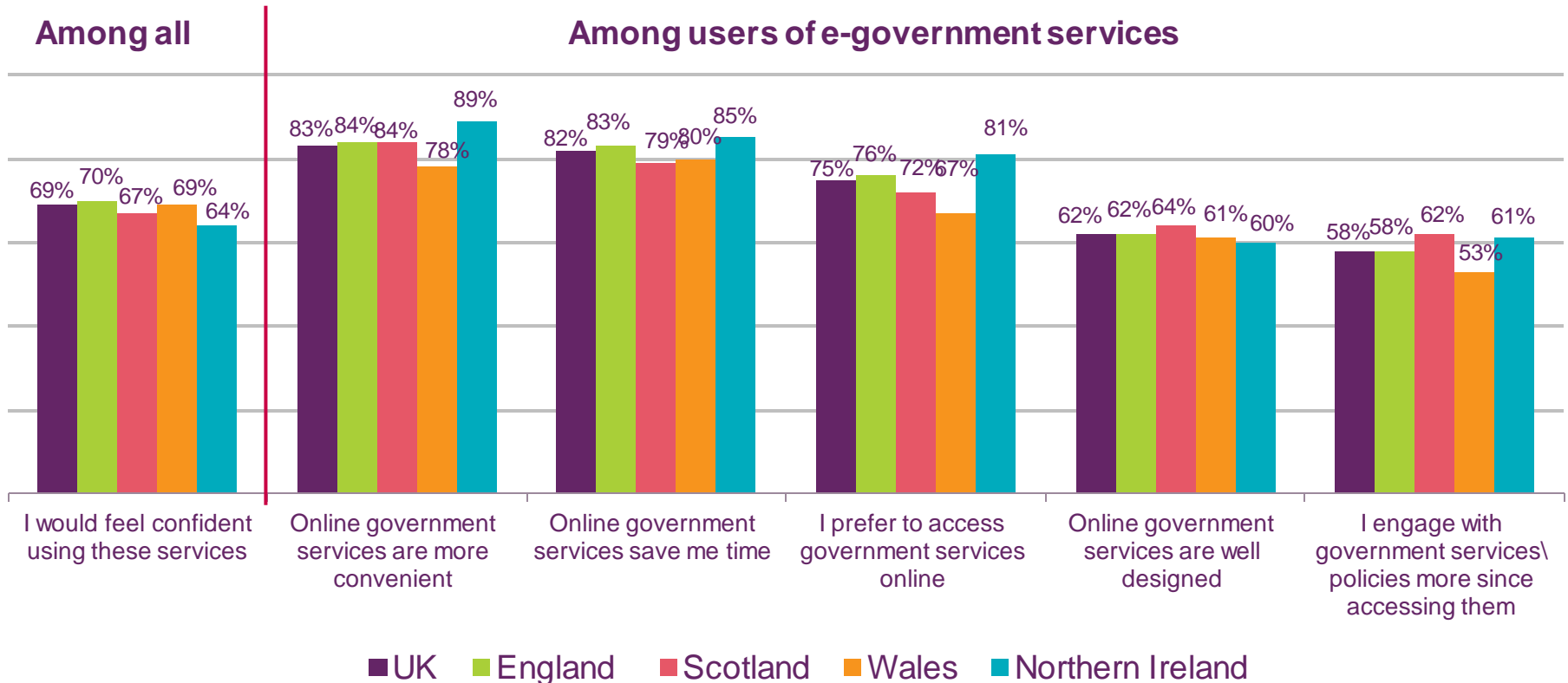
Preferred method of contact with local council, and for government processes, by nation



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

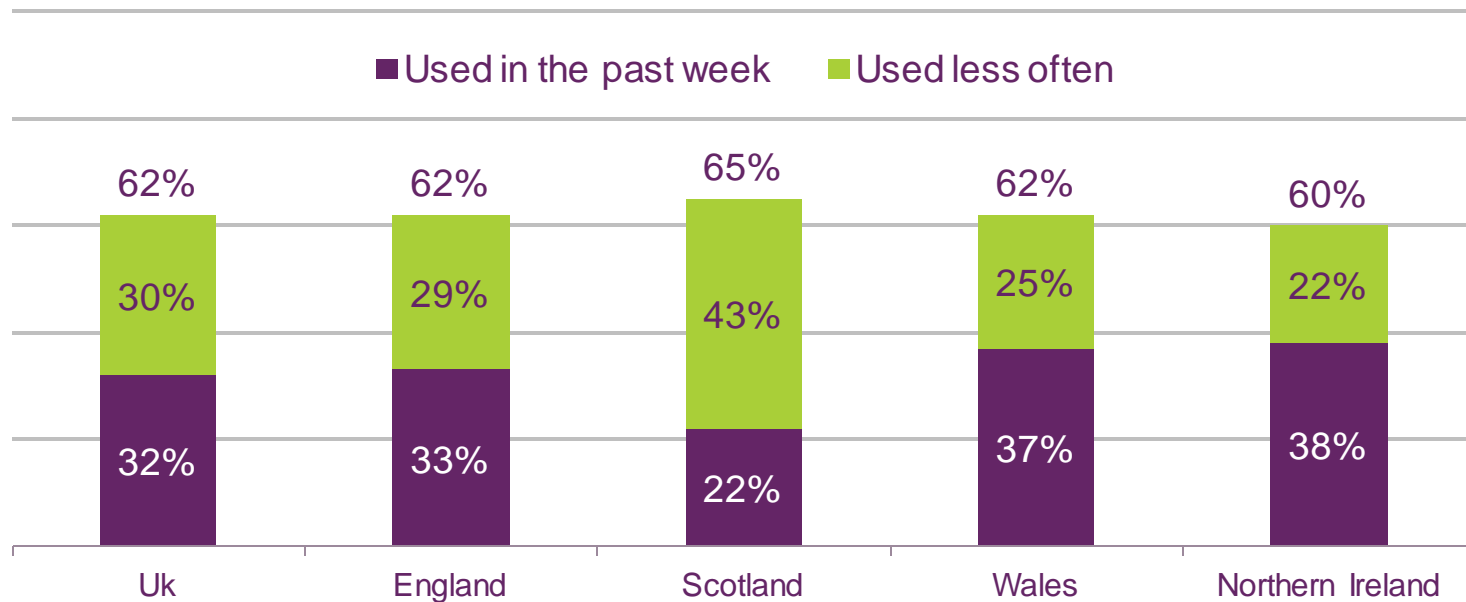


Source: Kantar Media Omnibus

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

%

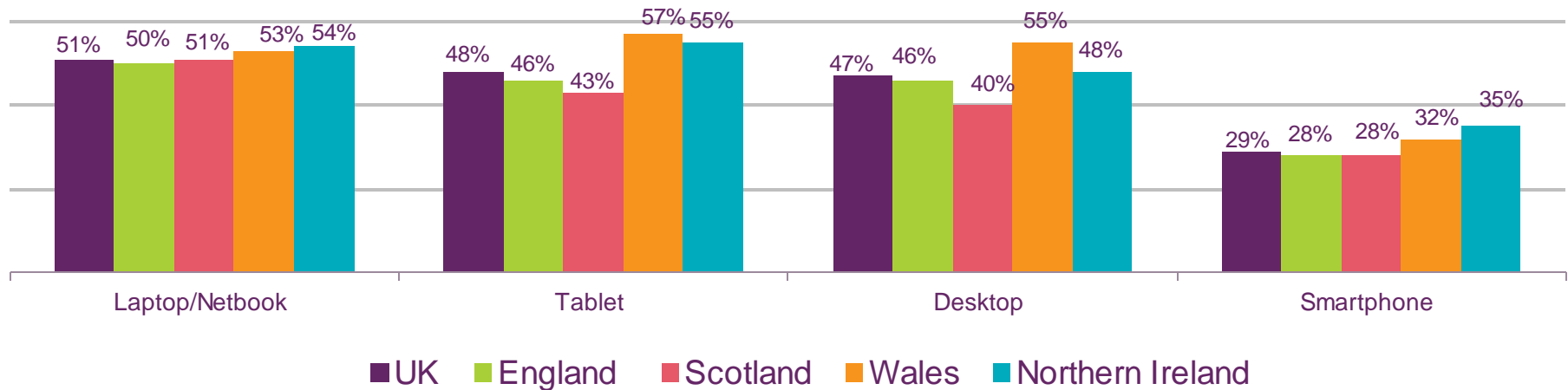


Source: Ofcom technology tracker research, Quarter 1 2013

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

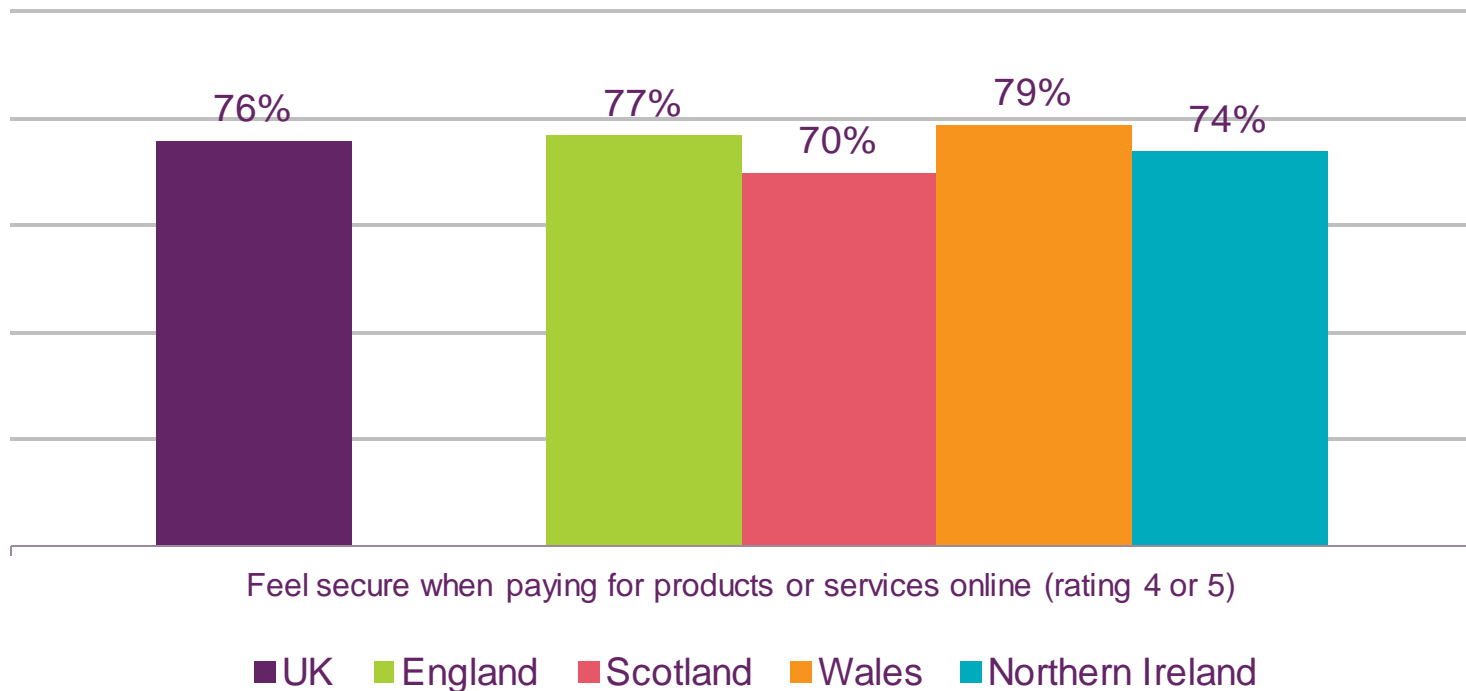


Source: Kantar Media Omnibus

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

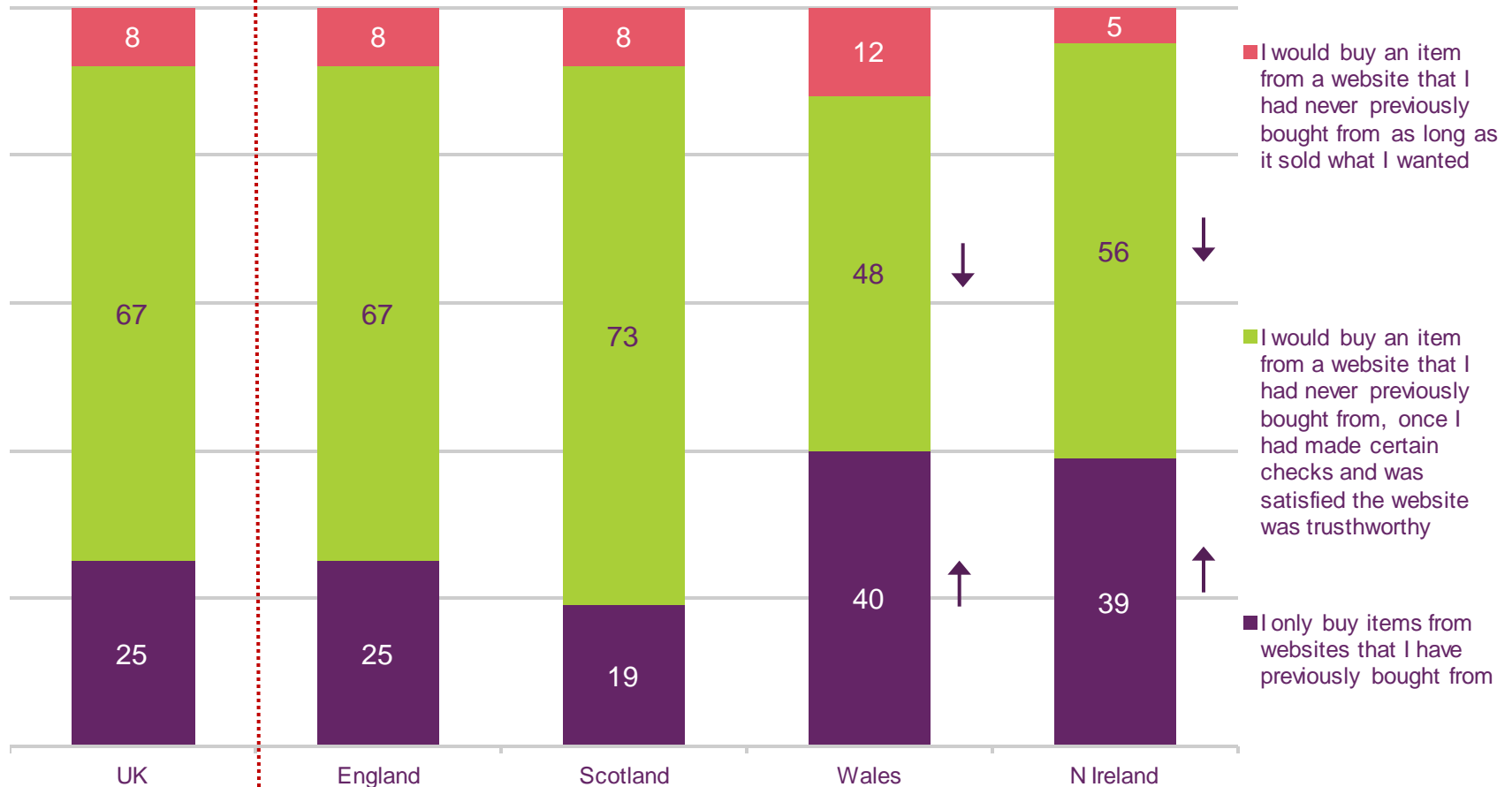
% Feel secure



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 form 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

Confidence in delivery when shopping online, by nation

% Feel confident

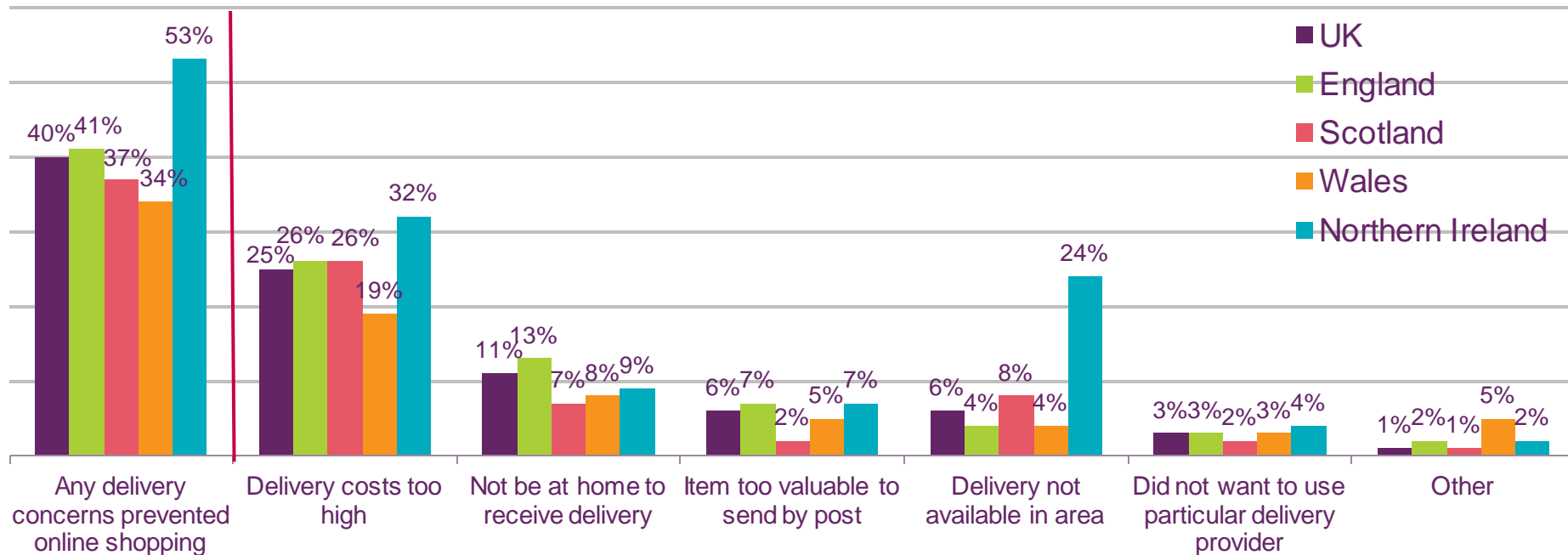


Source: Kantar Media Omnibus

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.

Delivery concerns preventing online purchasing, by nation

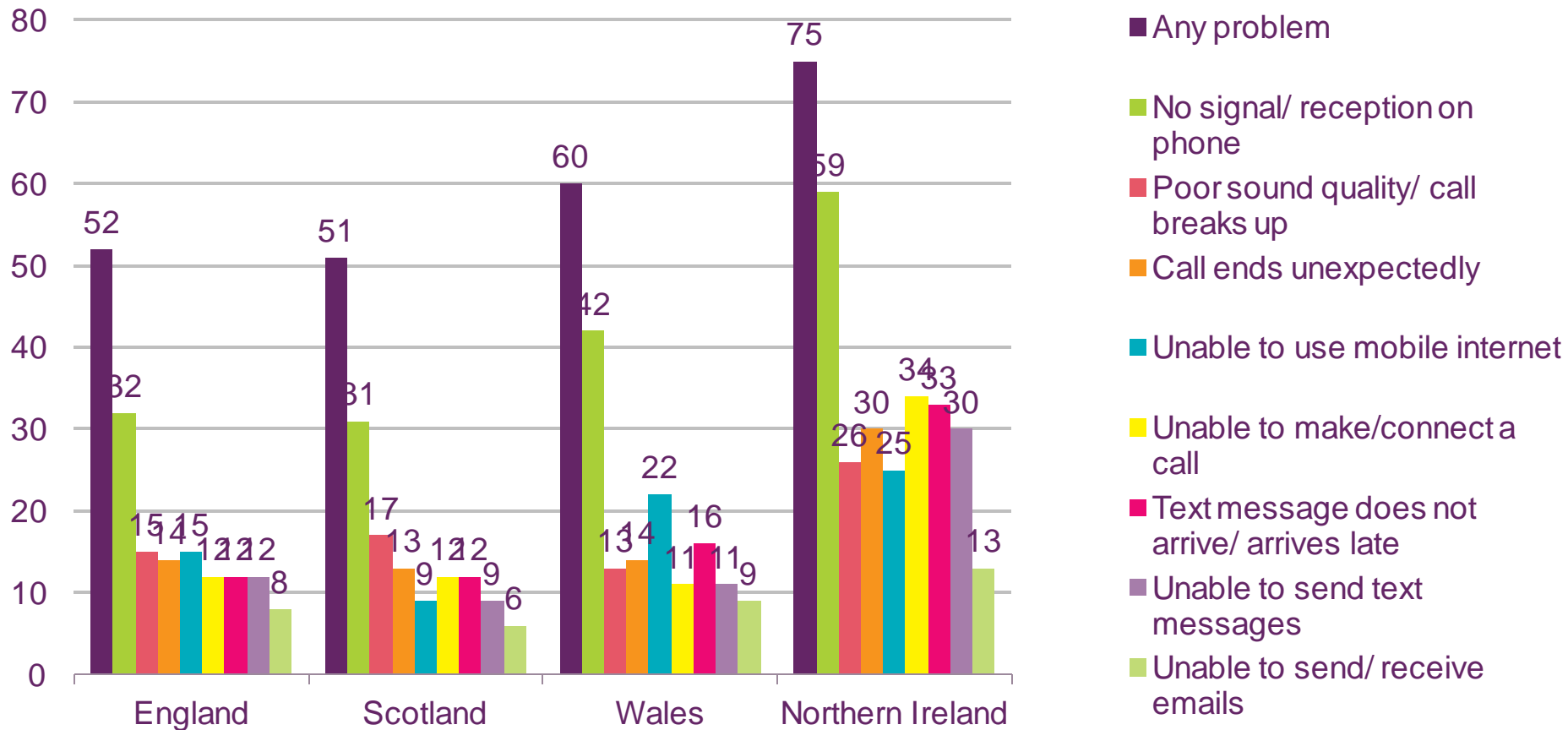
% mentioned each reason



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

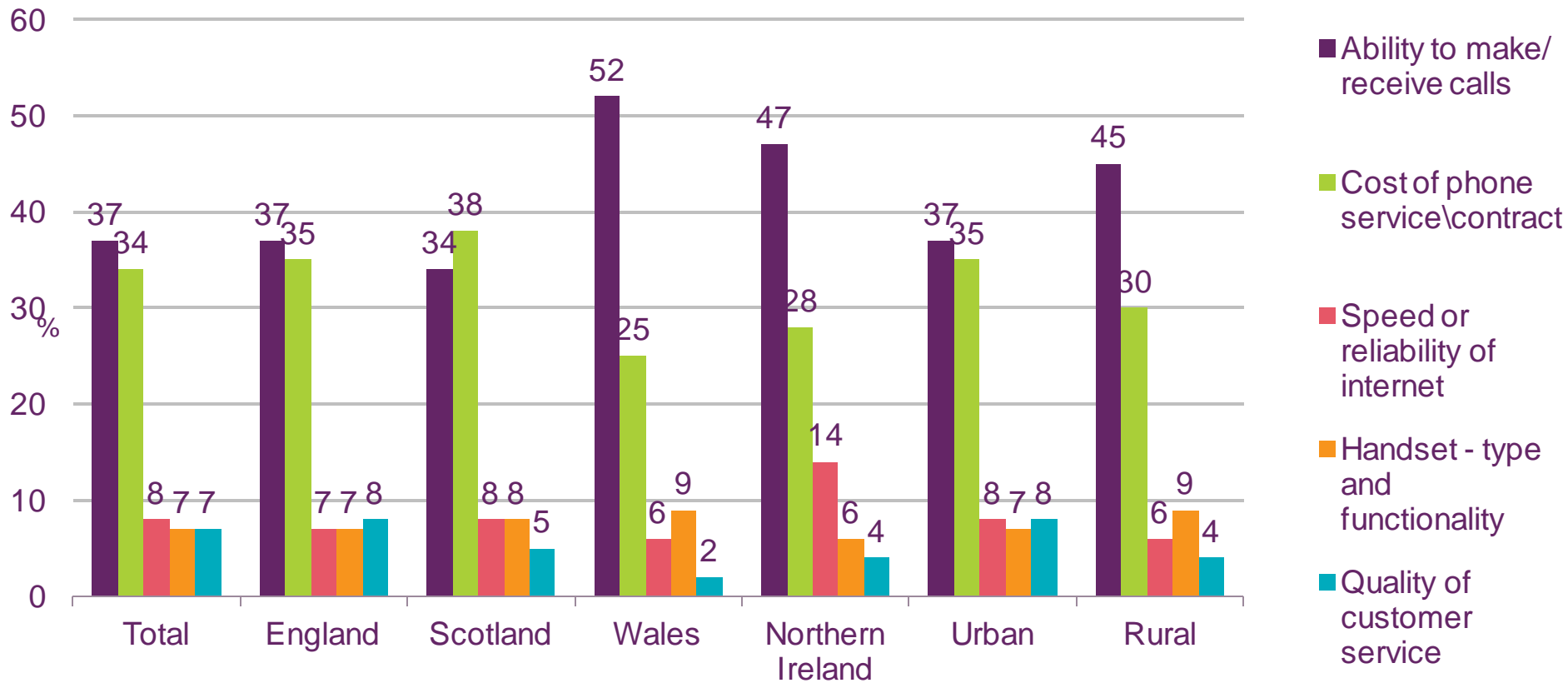


Change in levels of satisfaction with ability to make calls in different locations compared to 12 months ago, by nation



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



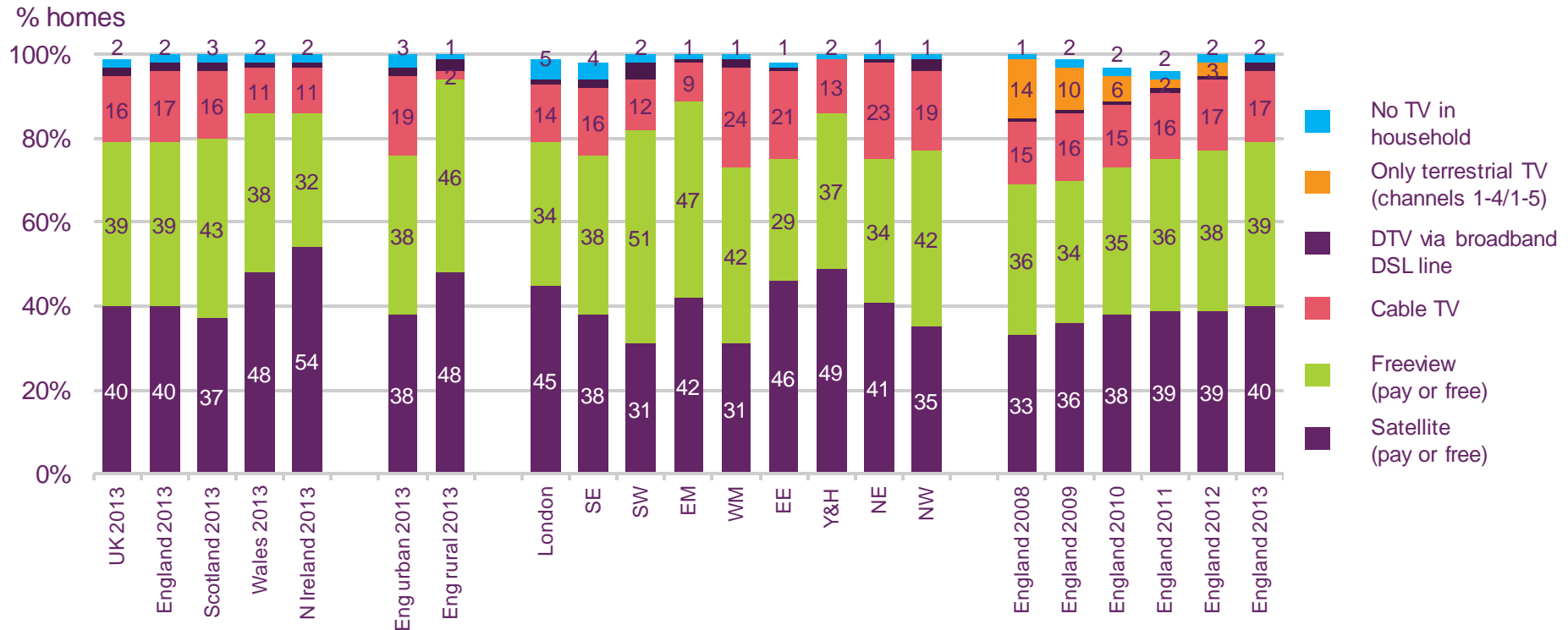
1. Source: Kantar Media omnibus, (14th – 20th November 2012)

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.

Television and audio-visual

Main TV set share by platform

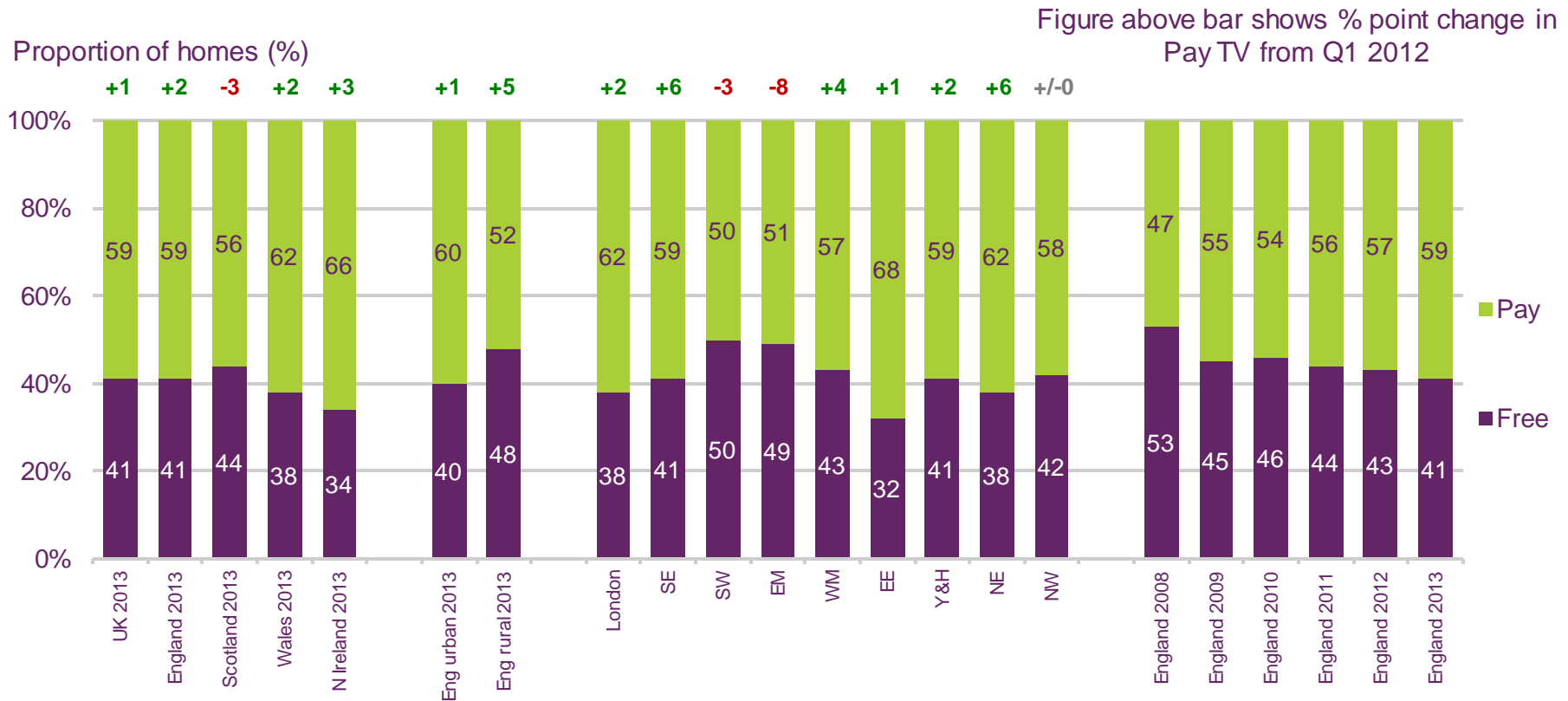


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Proportion of homes with free and pay television

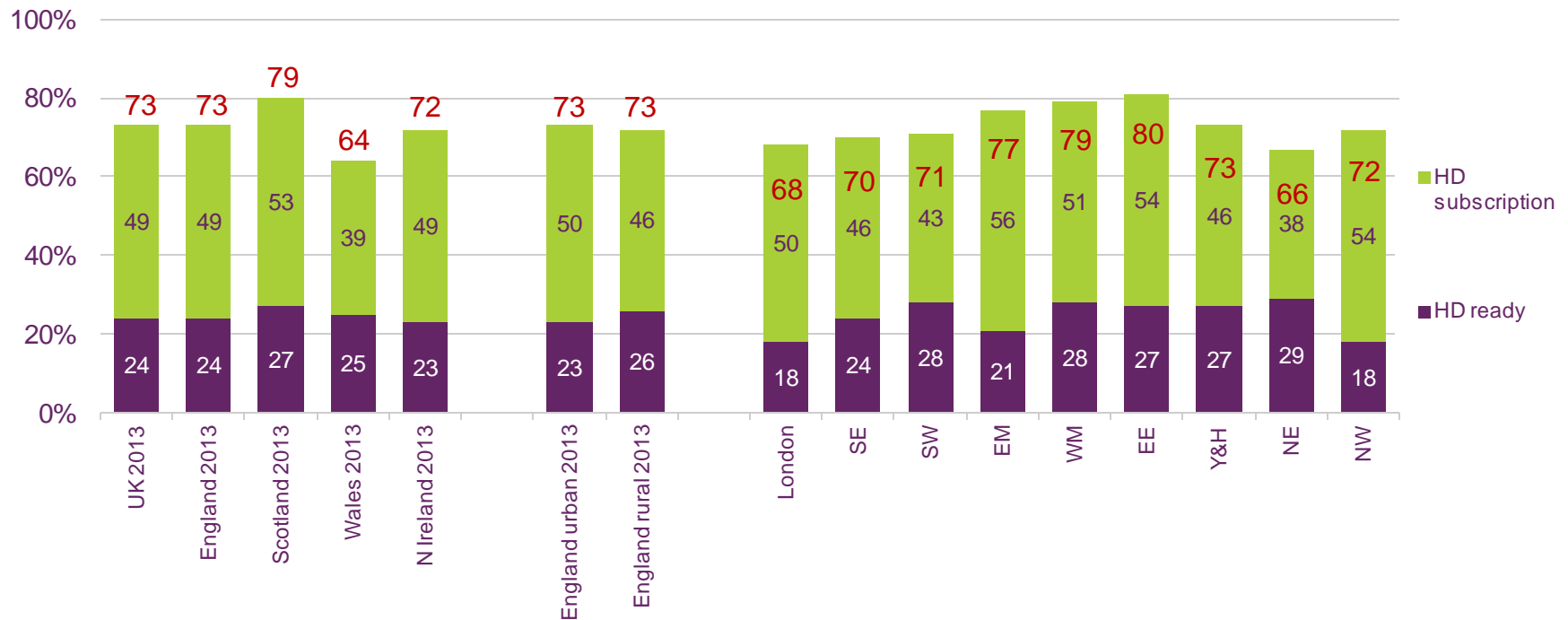


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 2197 England, 487 Scotland, 485 Wales, 492 Northern Ireland, 1915 England urban, 282 England rural, 235 London, 235 South East, 242 South West, 248 East Midlands, 248 West Midlands, 249 East of England, 245 Yorkshire & Humber, 248 North East, 247 North West, 3398 England 2008, 3389 England 2009, 5600 England 2010, 1941 England 2011, 2214 England 2012, 2197 England 2013)

Proportion of homes with HD television

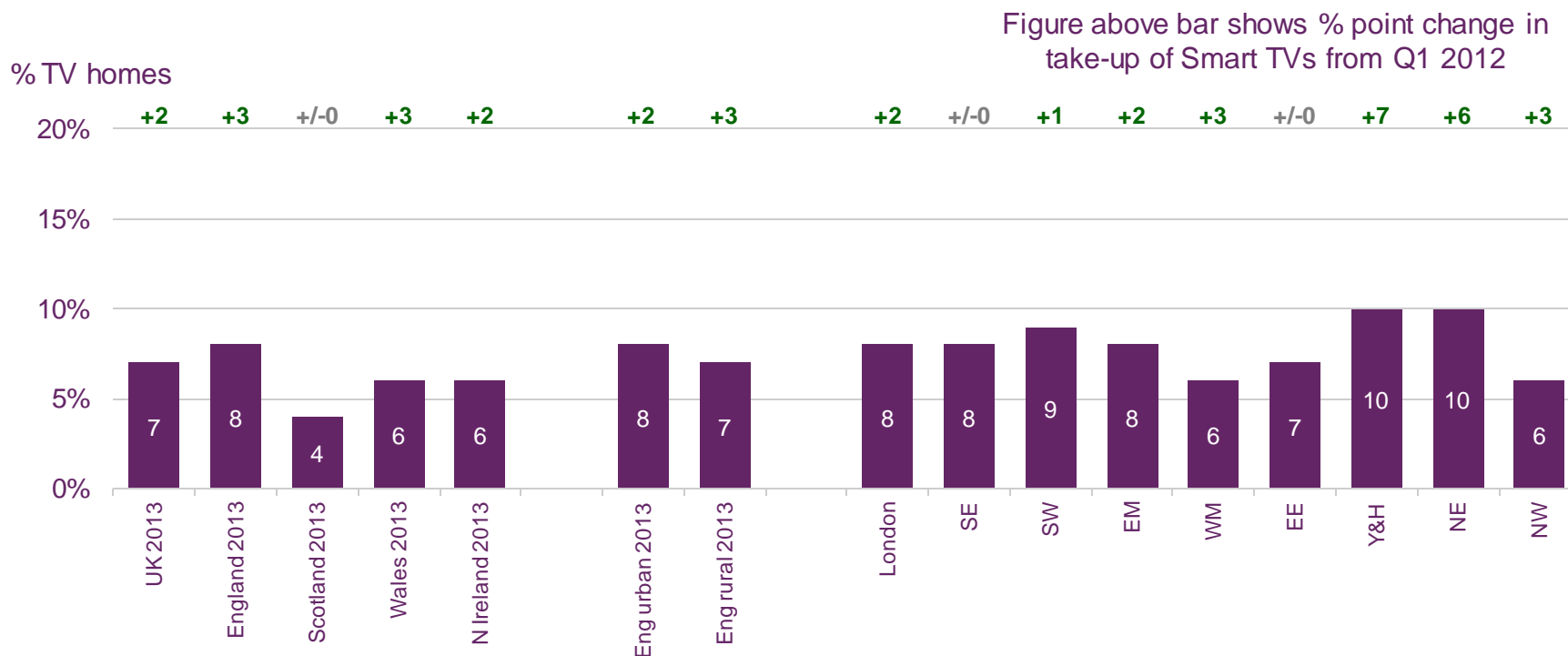


QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

Smart TV take-up in England

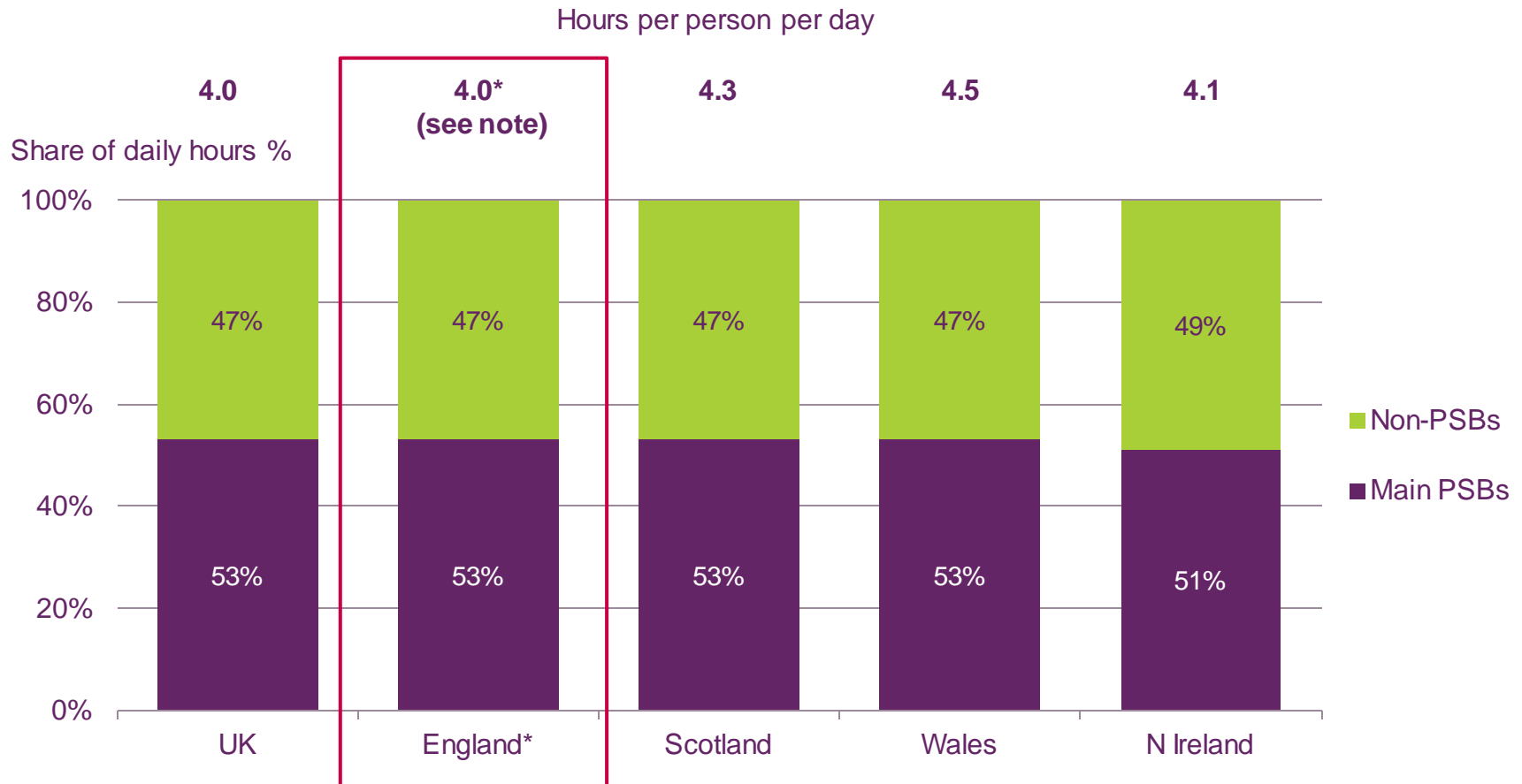


QH18. Are any of your TV sets “Smart TVs”? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ with a TV in household (n = 3661 UK, 2197 England, 487 Scotland, 485 Wales, 492 Northern Ireland, 1915 England urban, 282 England rural, 235 London, 235 South East, 242 South West, 248 East Midlands, 248 West Midlands, 249 East of England, 245 Yorkshire & Humber, 248 North East, 247 North West)

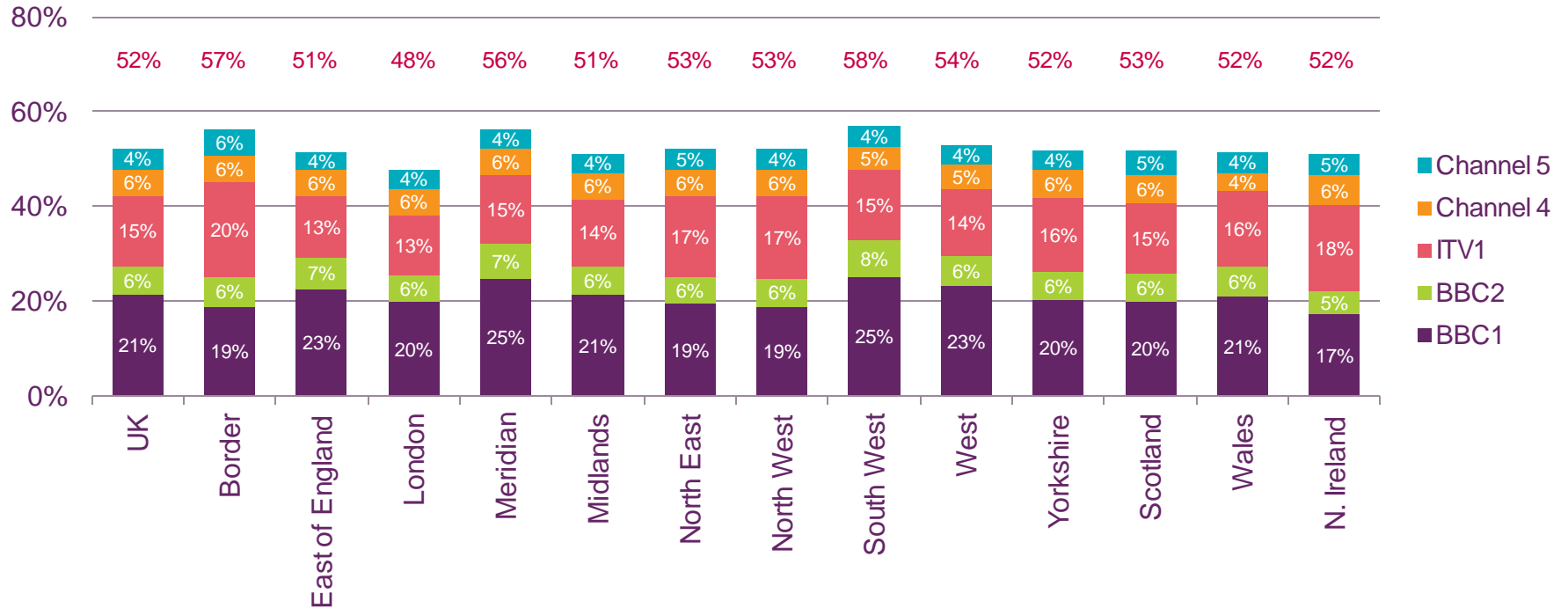
Hours of daily TV viewing, by nation, 2012



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.**

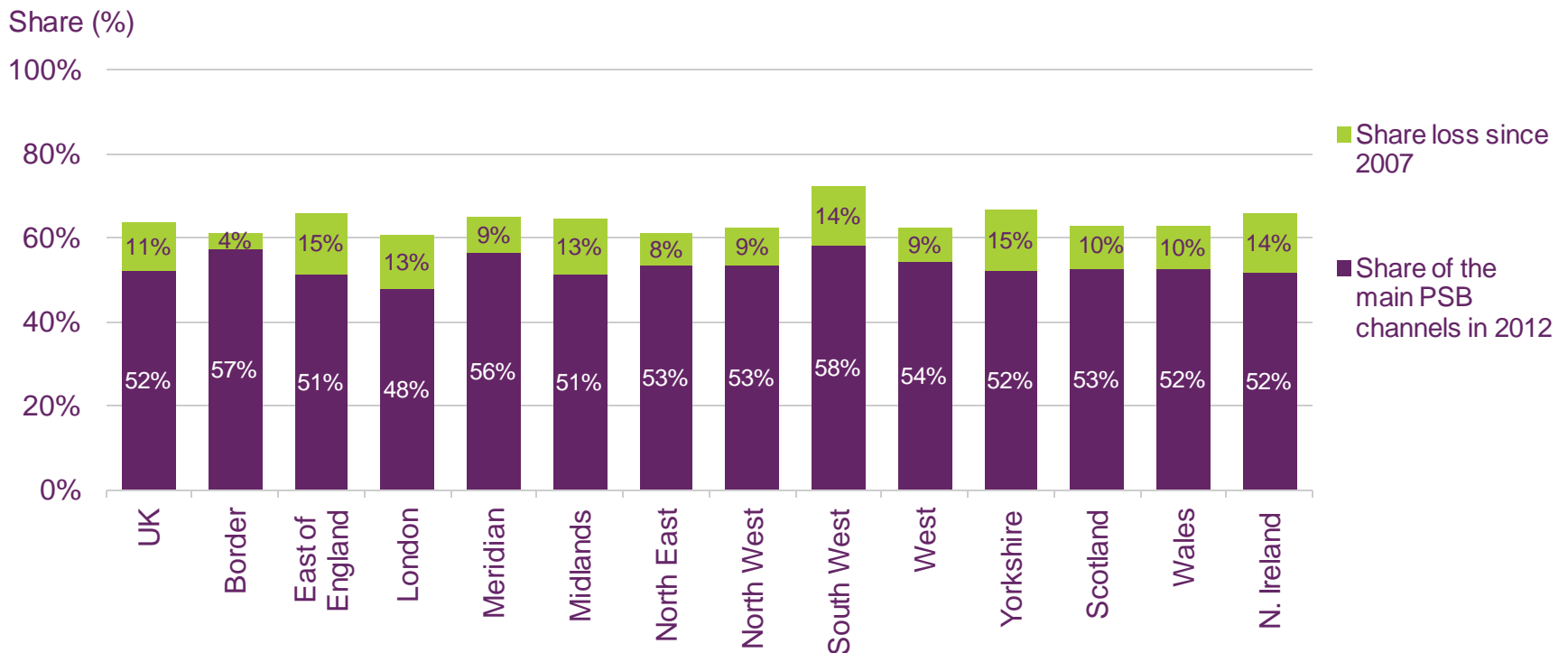
Share of the five main PSB channels in all homes, 2012

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



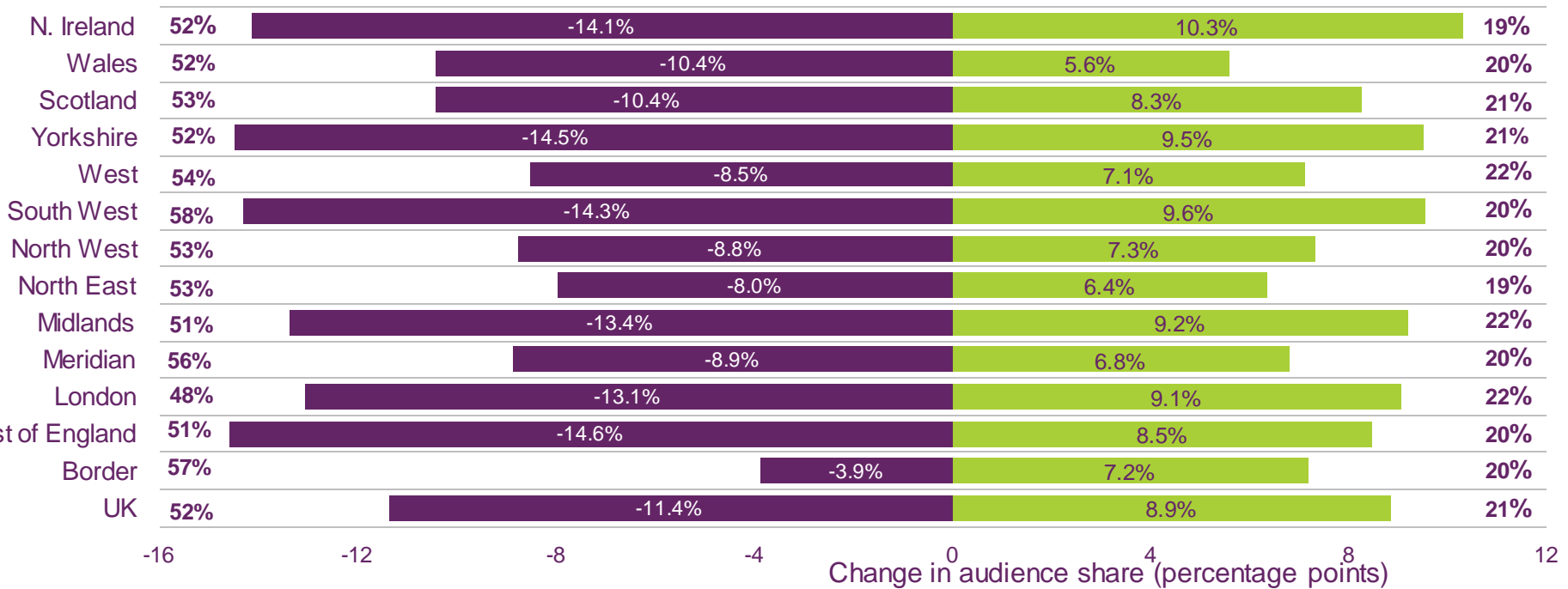
Source: BARB, all individuals (4+). HD channel variants are included.

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

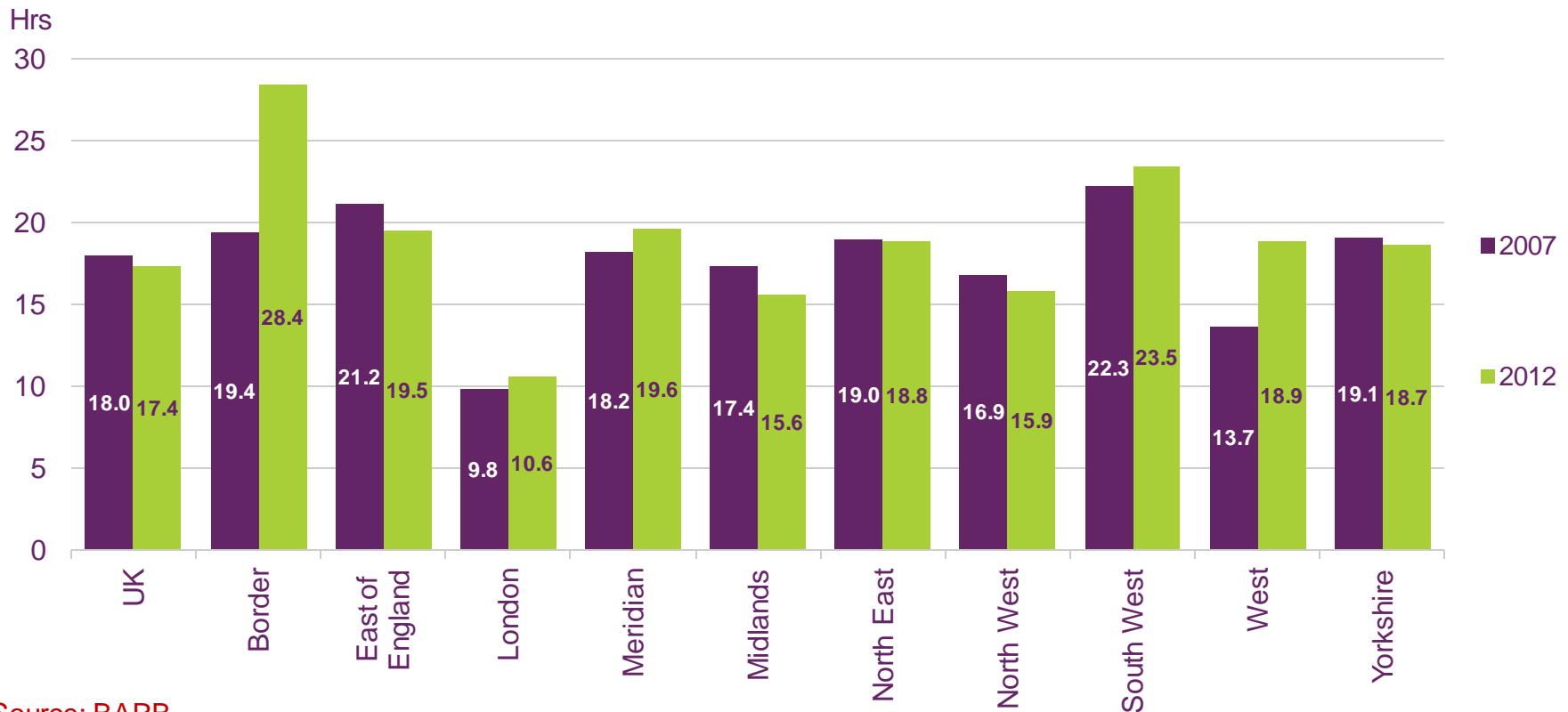
■ Change in total share of five main PSB channels since 2007 ■ Change in total share of the PSB portfolio channels since 2007



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.

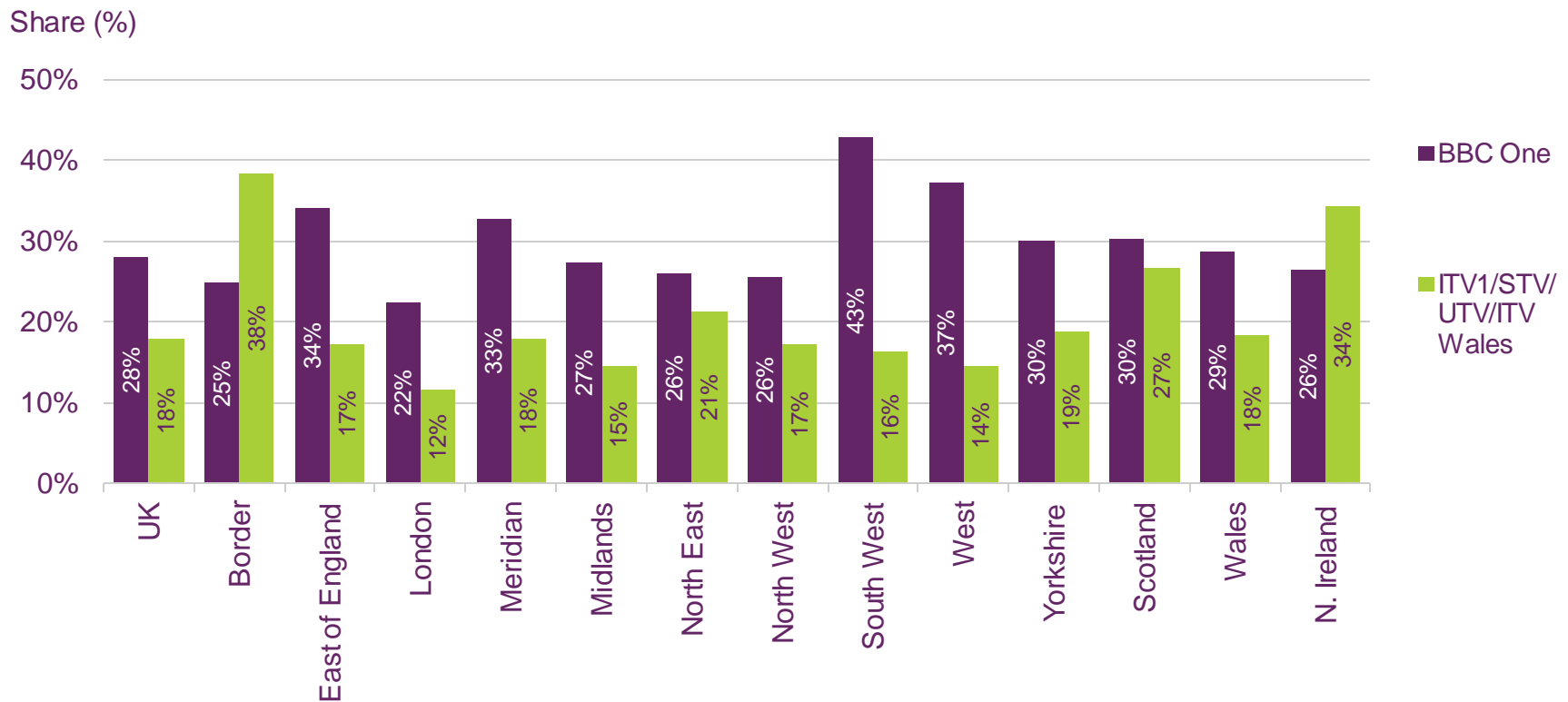
Combined total hours of viewing of early evening regional news bulletins, all homes in 2007-2012, by English region



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

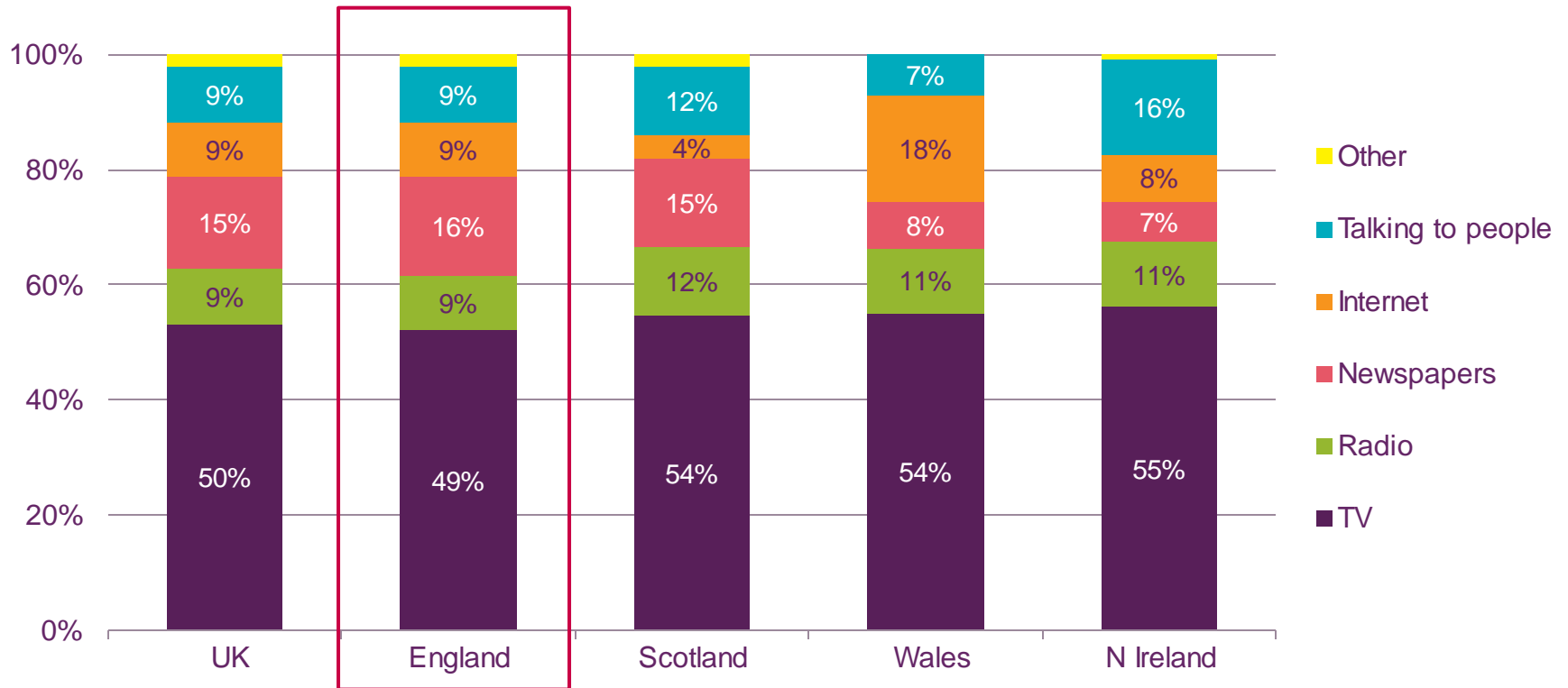


Source: BARB, all individuals (4+)

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.

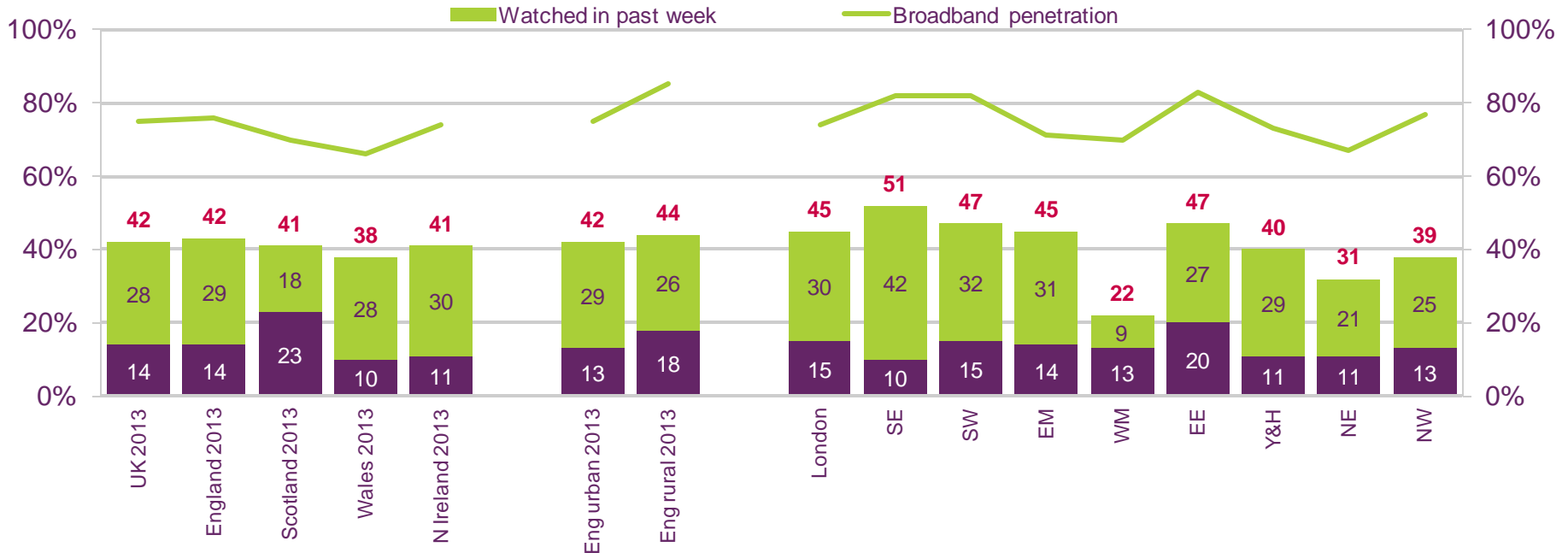
Base: All adults; England (1,434); Scotland (189); Wales (118); Northern Ireland (113).

Only responses ≥ 3% labelled

Online TV/ video viewing

Online TV/ video viewing on PC or mobile

Proportion of individuals with broadband at home

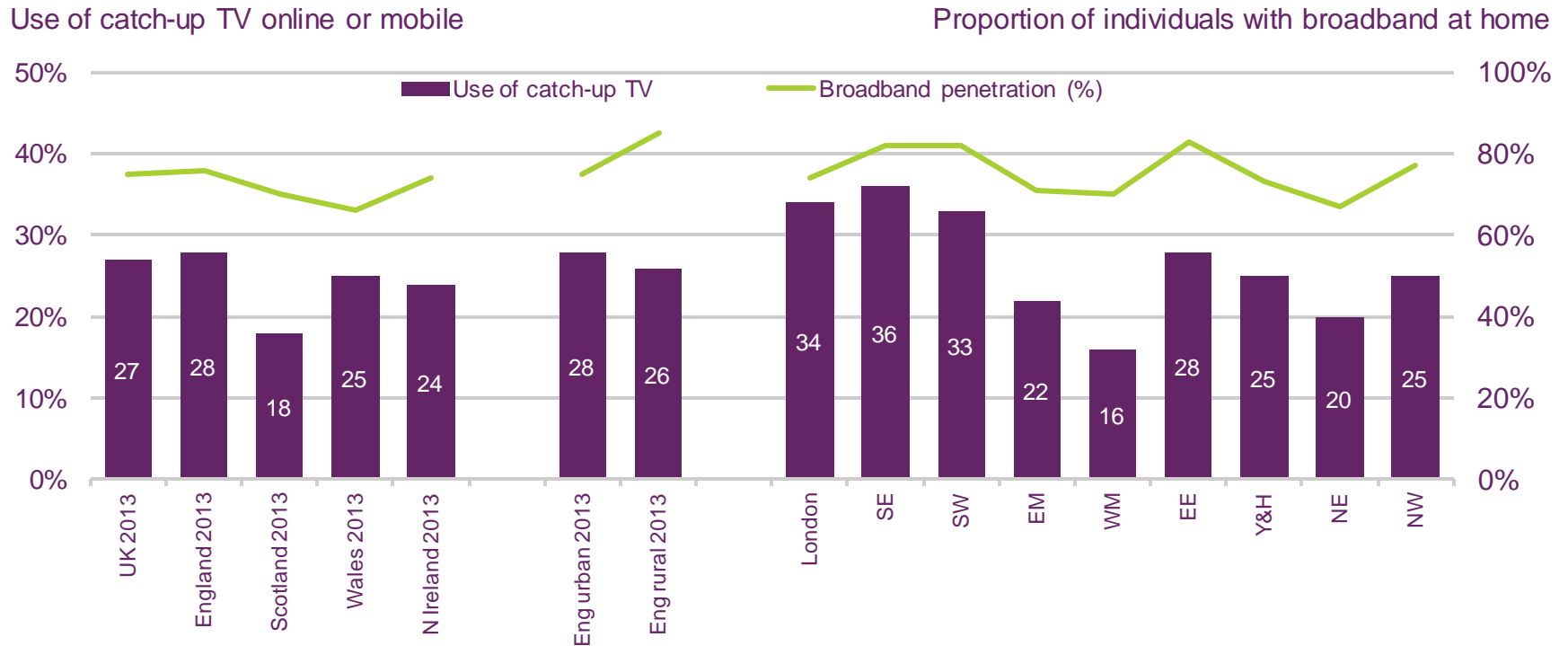


QE5A-B. Which, if any, of these do you use the internet for? And, which, if any, of these activities have you used the internet for in the last week?*/ QD28A-B. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? And which of these activities 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

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.

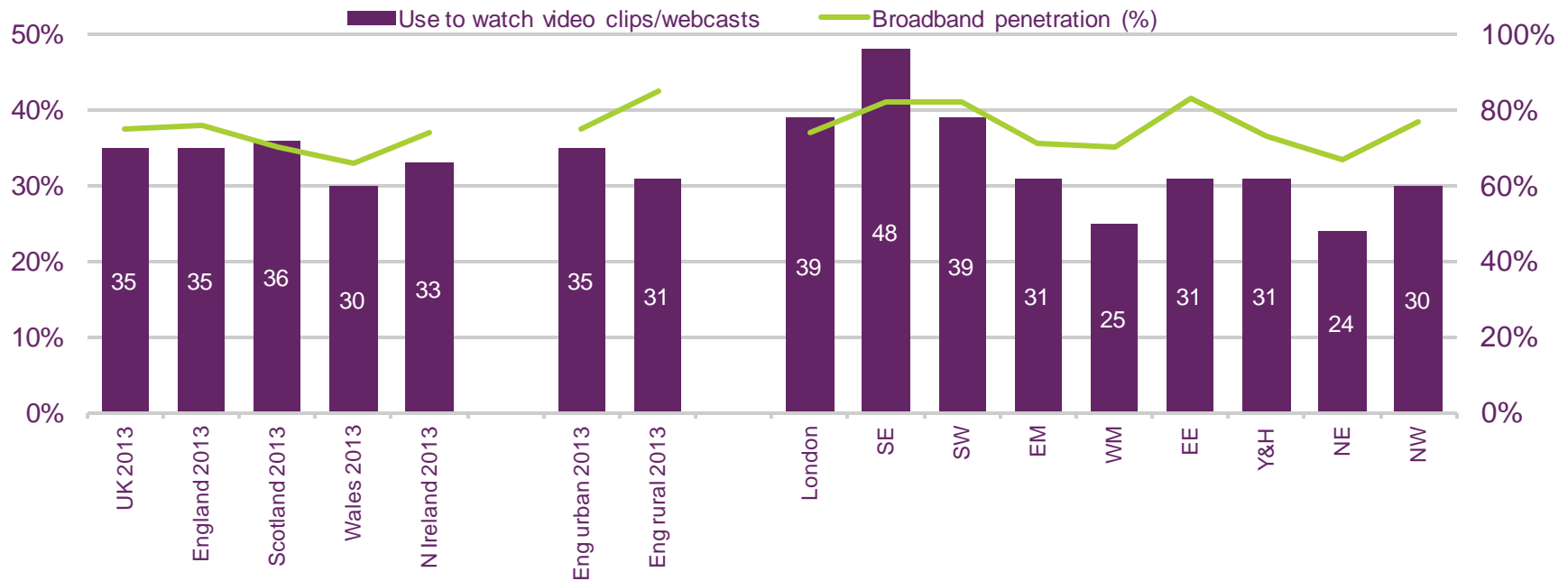
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

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

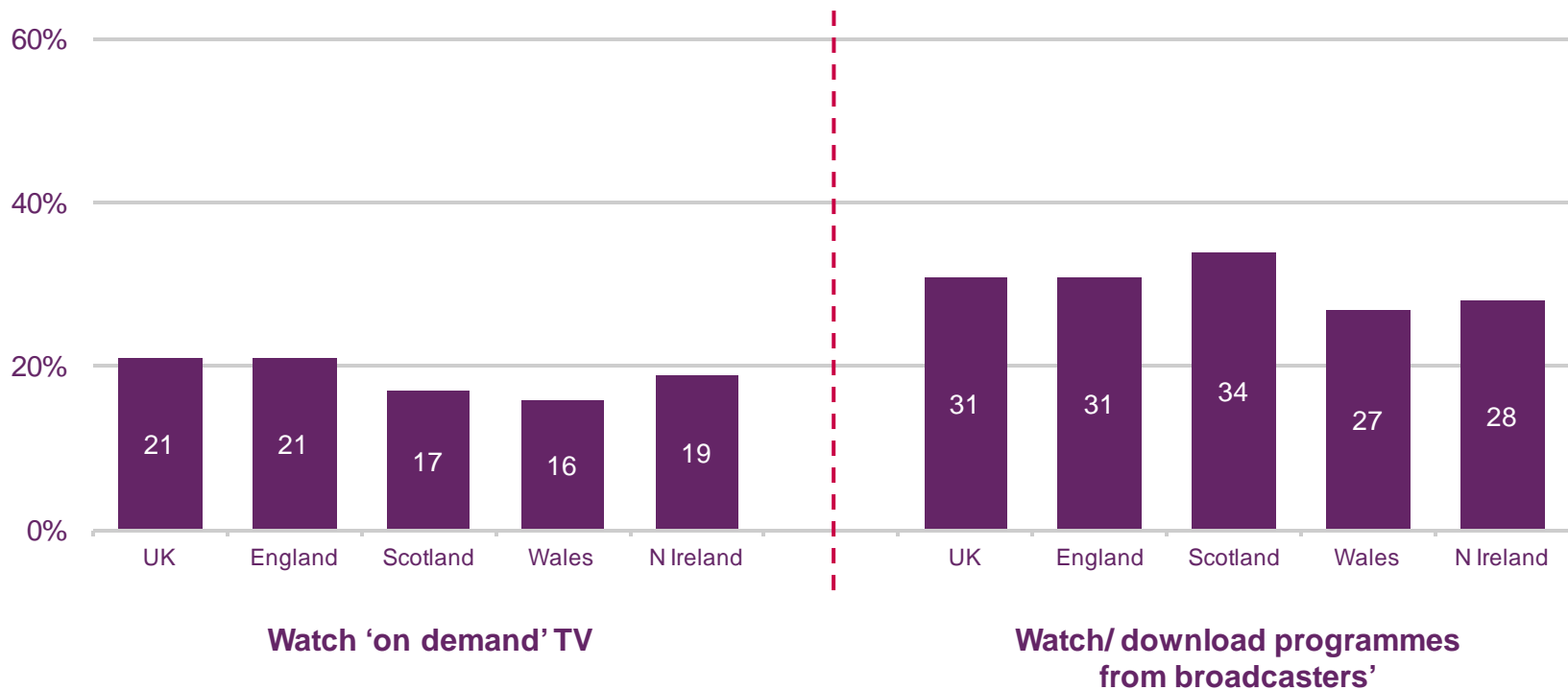


QE5A. Which, if any, of these do you use the internet for?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about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

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

Use of non-linear TV

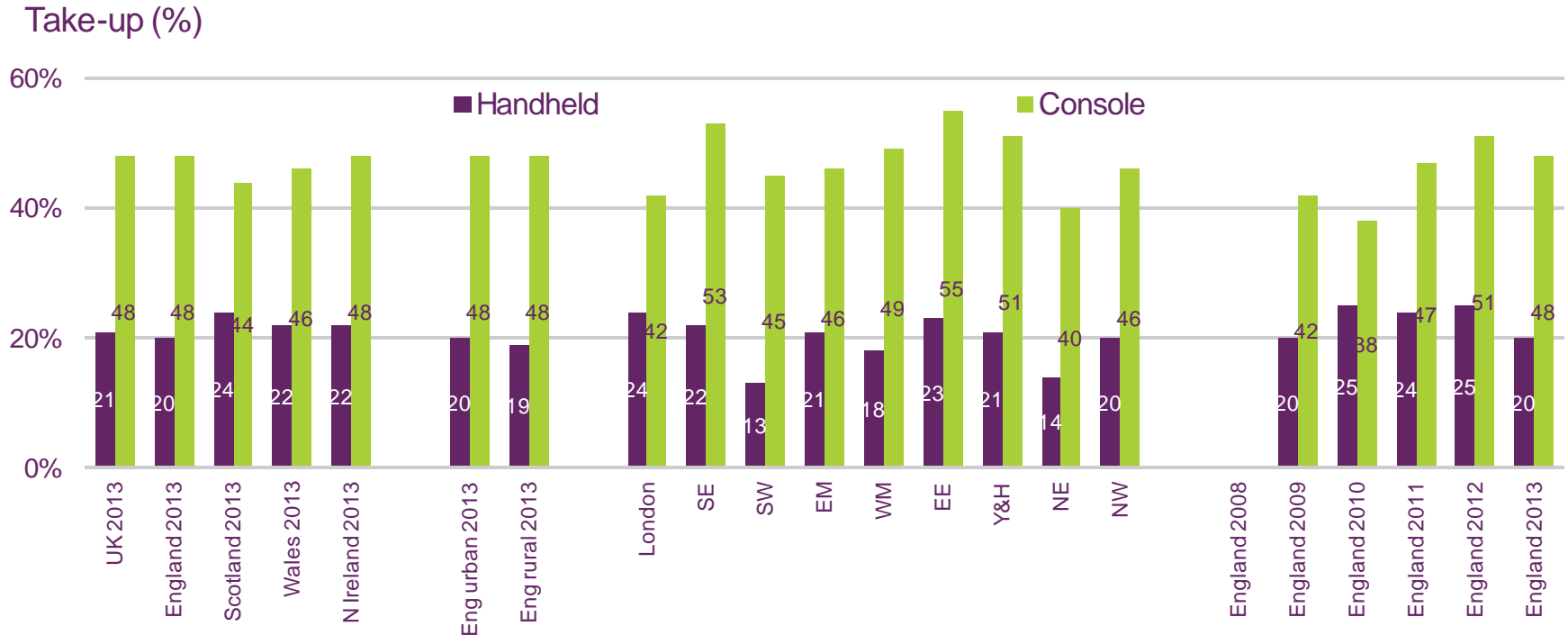


QH42A. Do you ever watch TV programmes 'on demand' through your TV service? By this I mean pay-per-view programmes or using the TV catch-up services that allow you to watch some of the programmes shown in the last week, through services such as Sky Anytime+ or Virgin media Catch-up TV./ QH43A. Do you 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland)

Take up of leading games consoles in England



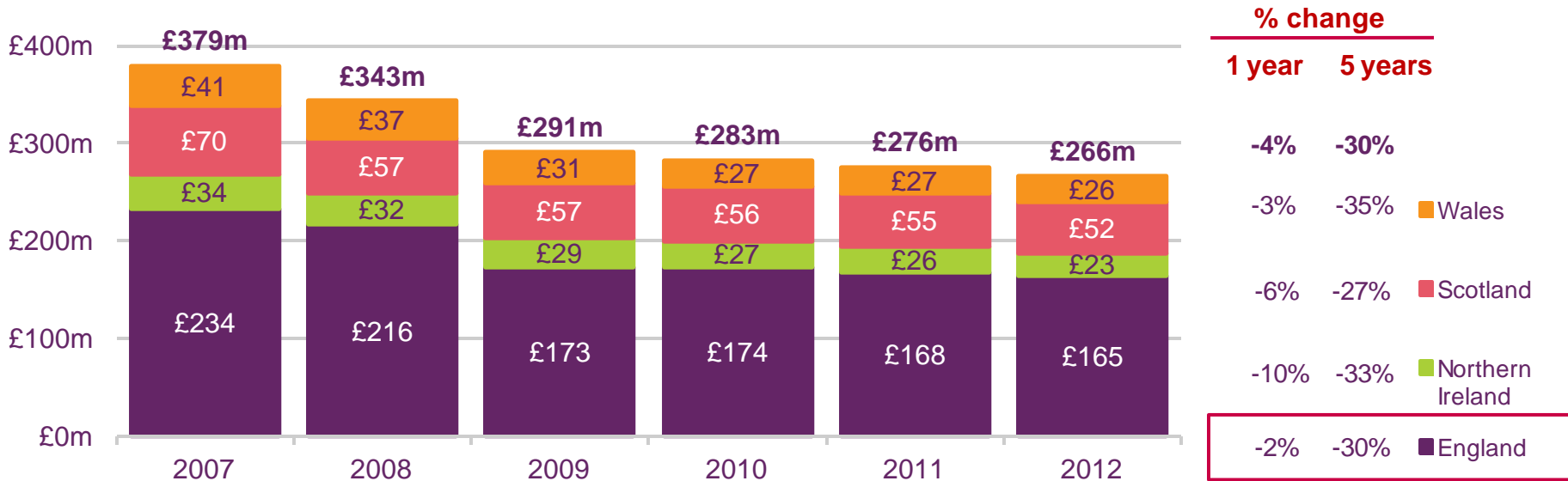
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 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	

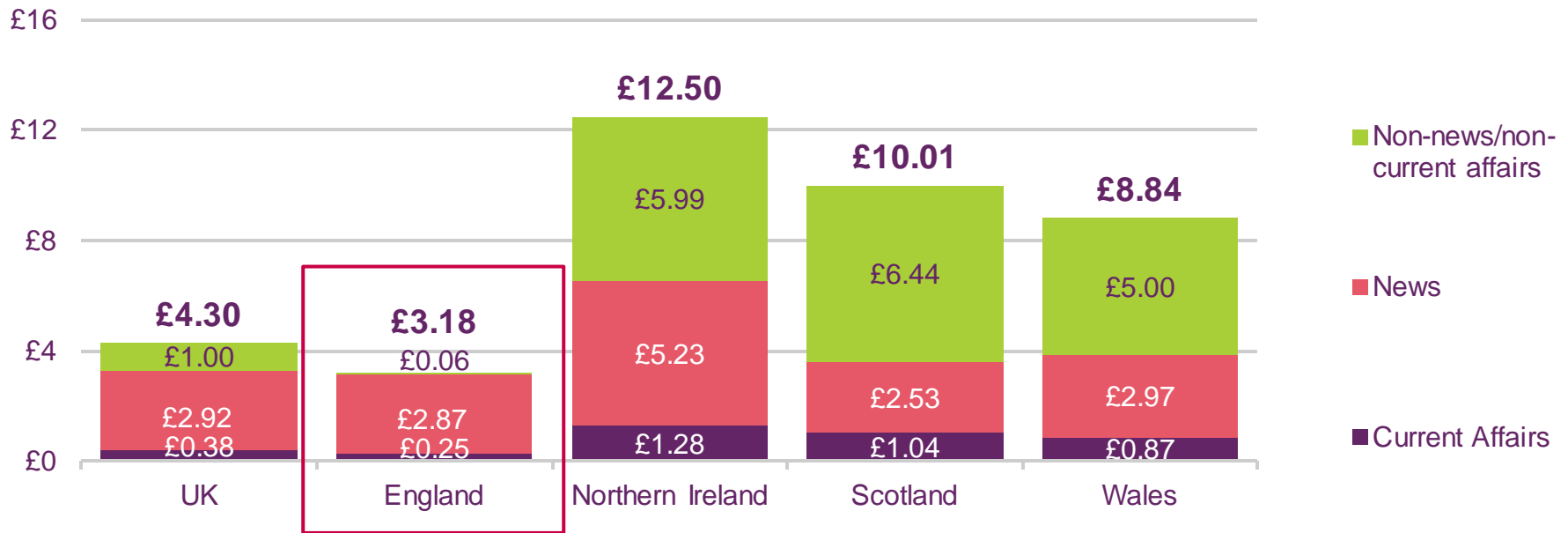
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-4%	-29%	-2%	-28%	-10%	-33%	-7%	-26%	-2%	-34%

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

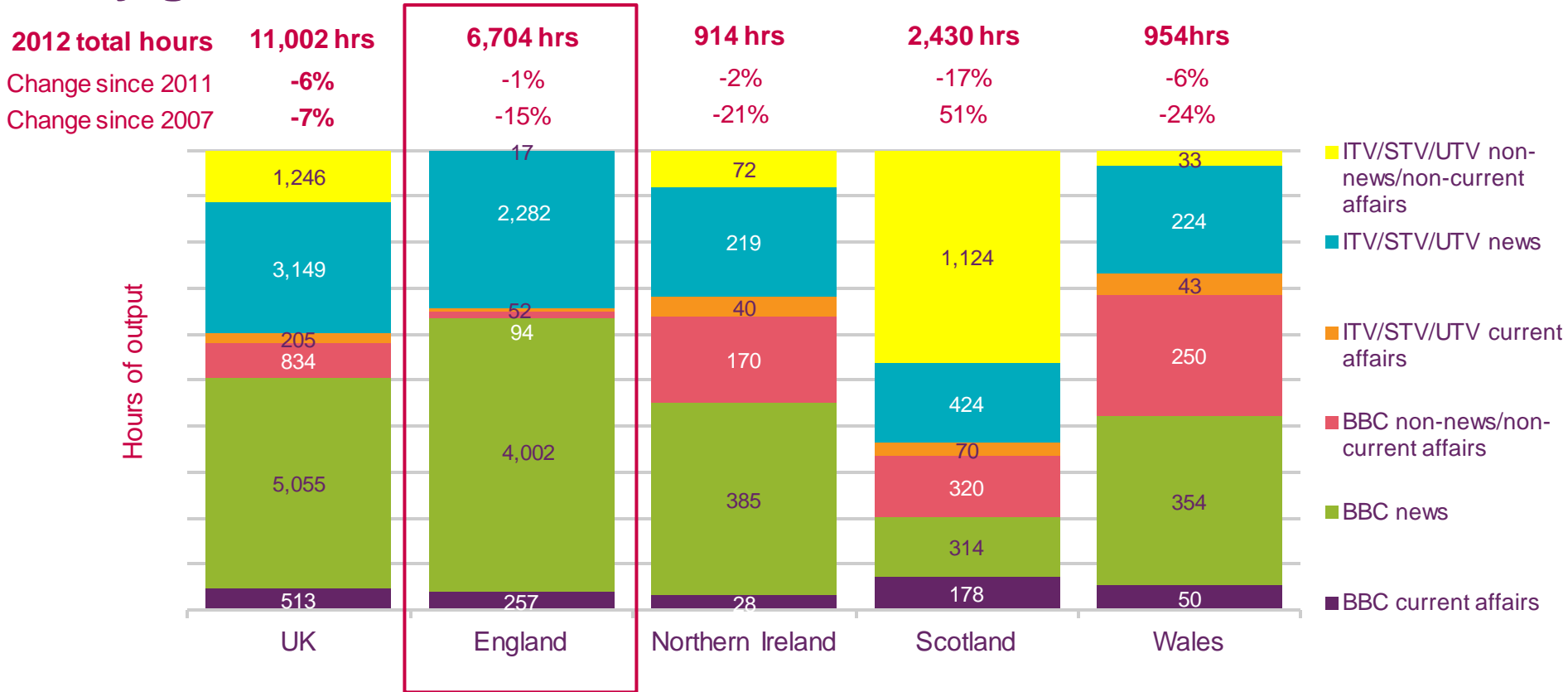
Spend per head



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.

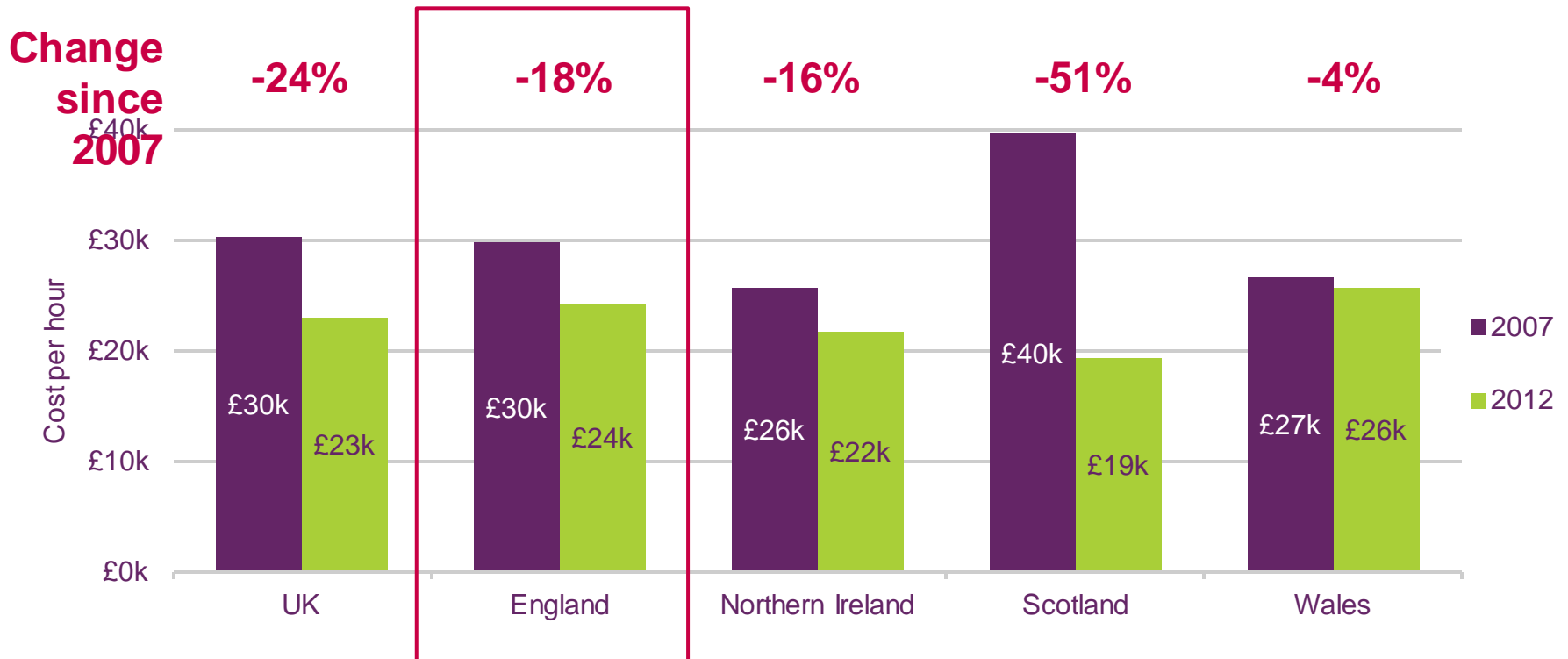
First-run originated hours of nations/regions output, by genre and broadcaster: 2012



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

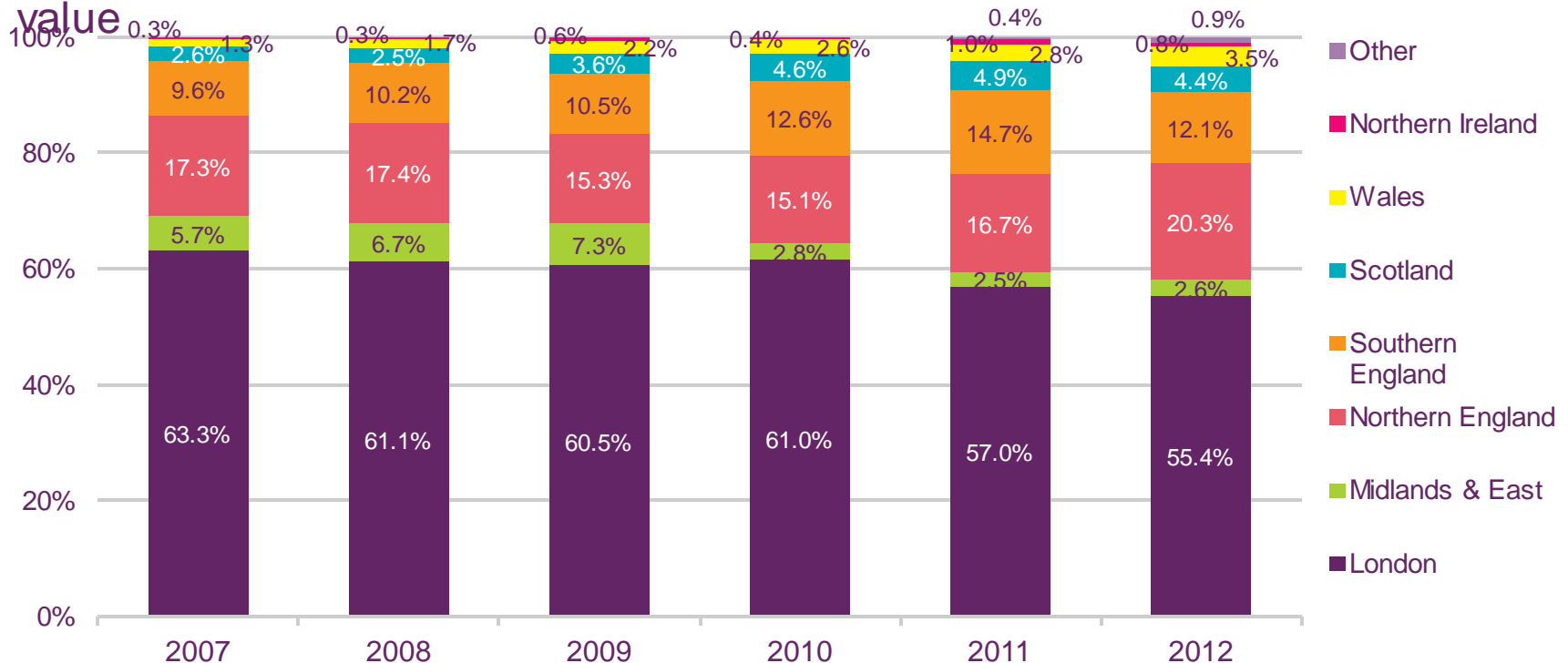


Source: Broadcasters. All figures expressed in 2012 prices.

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.

Expenditure on out-of-London production

Percentage of production by value

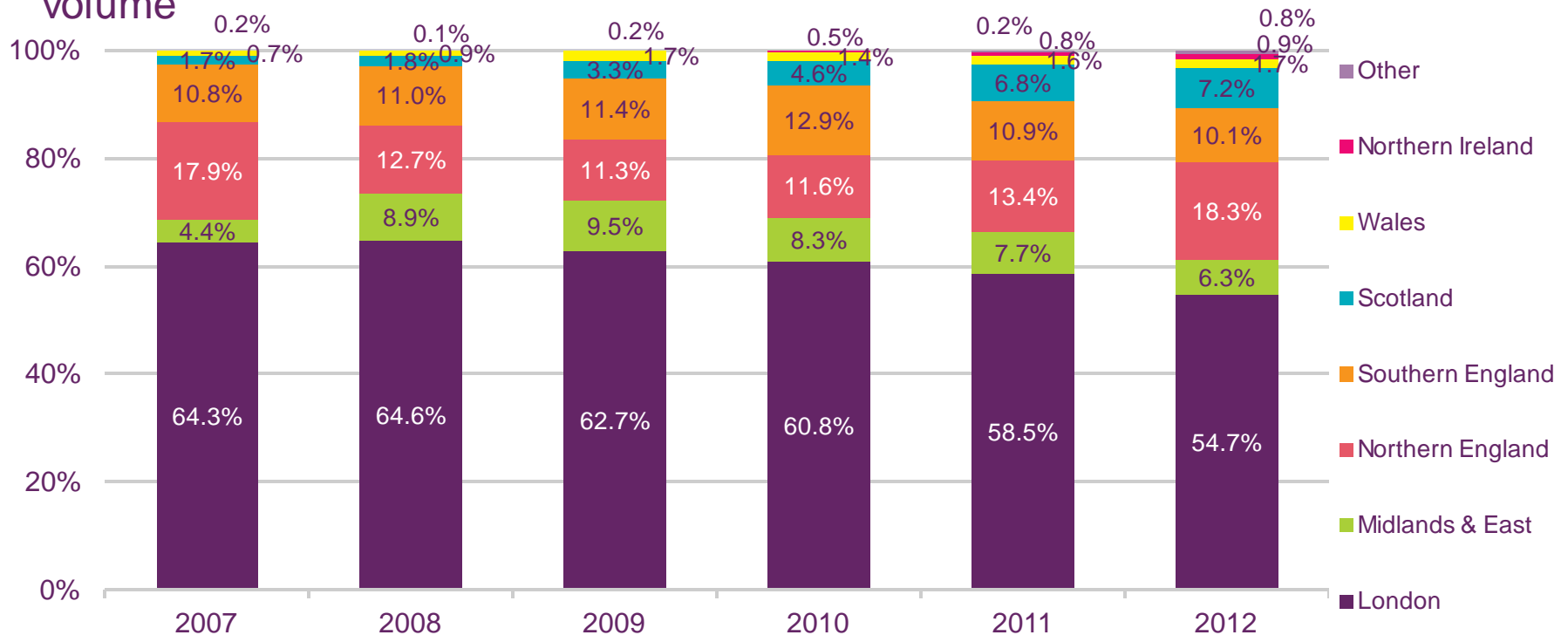


Source: Ofcom/broadcasters

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



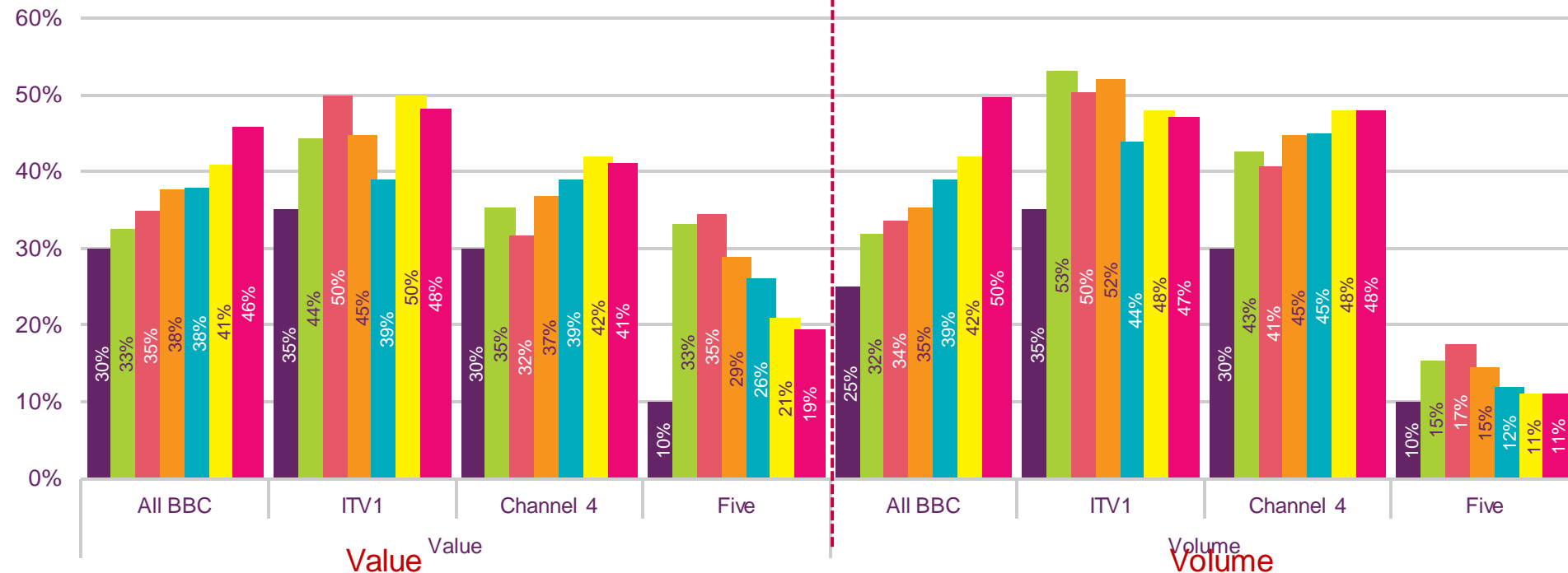
Source: Ofcom/broadcasters

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%	0.8%	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

Number of community radio stations on air: 2007-2013

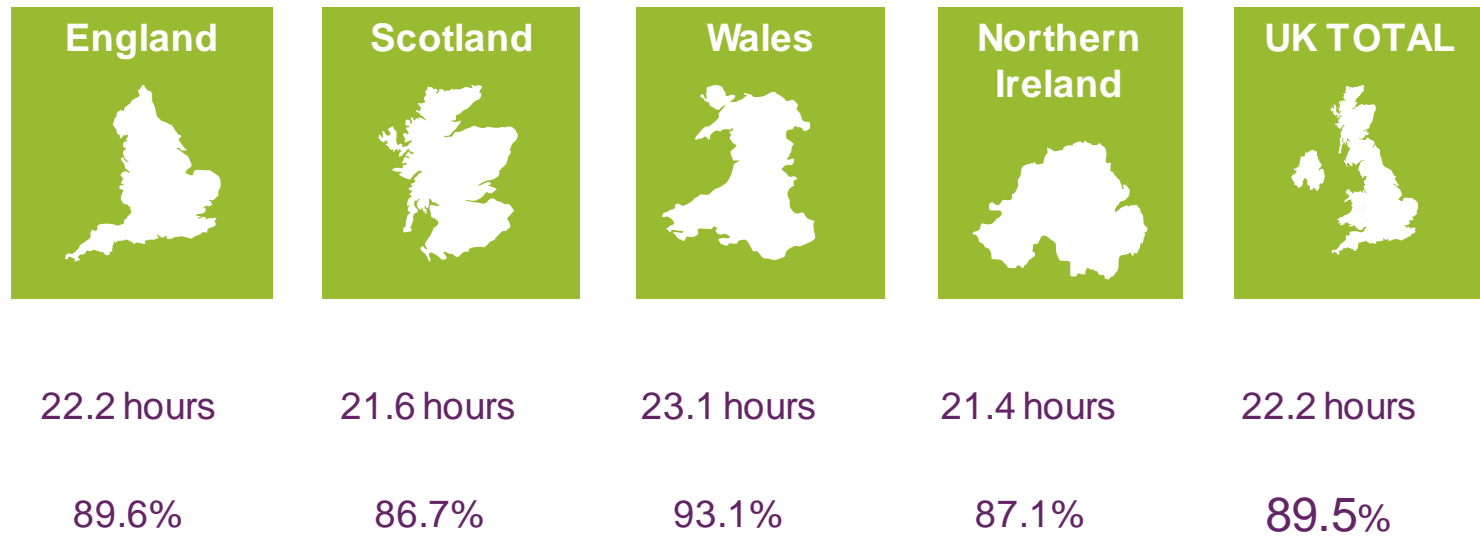
	2007	2008	2009	2010	2011	2012	2013
England	72	95	126	146	160	159	165
UK	90	123	163	184	199	197	203

Number of stations



Source: Ofcom, 2013

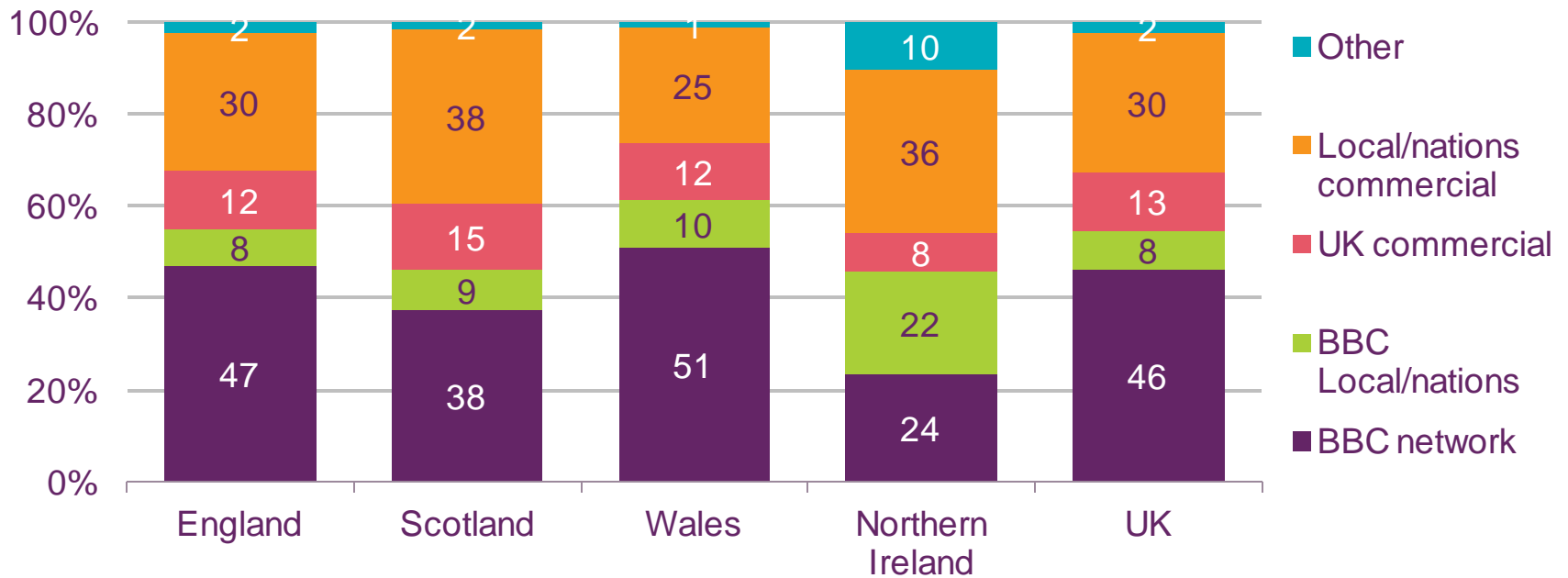
Average weekly reach and listening hours: 2012



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

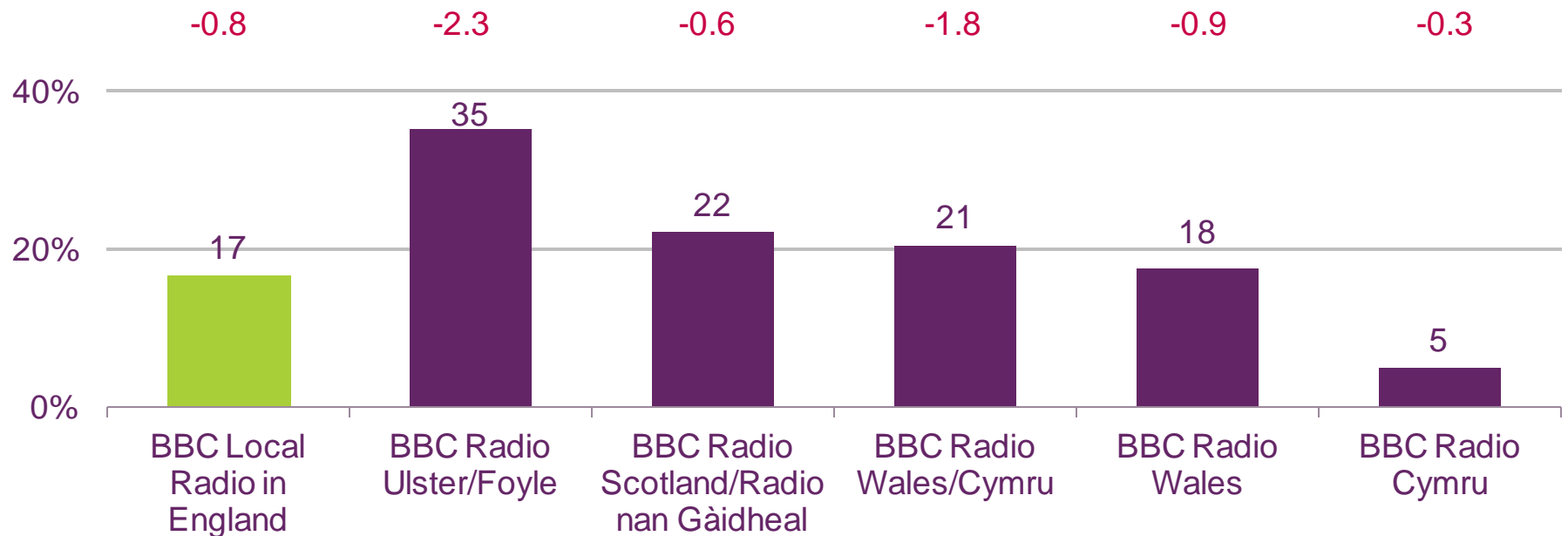
Share of listening hours



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

Weekly reach for nations/local BBC services

Change on previous year (percentage points)

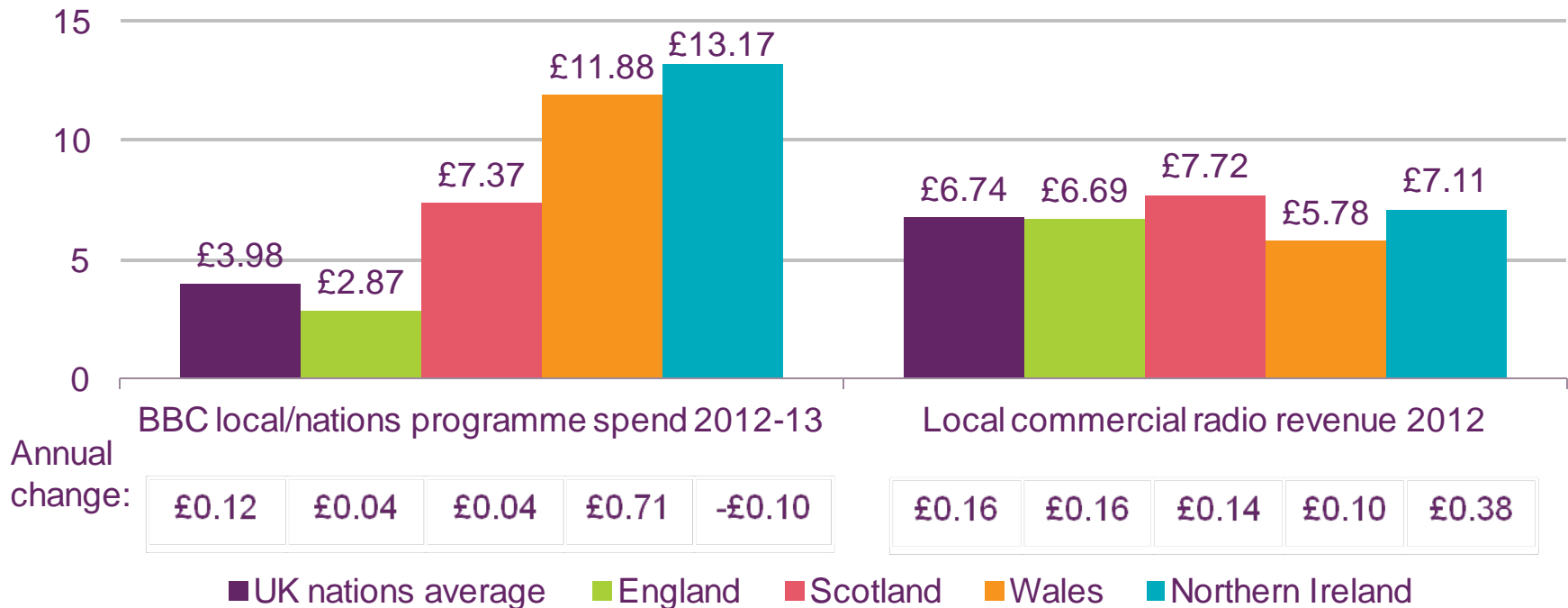


Source: RAJAR, All adults (15+), year ended Q4 2012

Local/nations radio spend and revenue

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

Radio revenue / spend per head (£ per capita)



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.

Share of listening hours via digital and analogue platforms: 2012

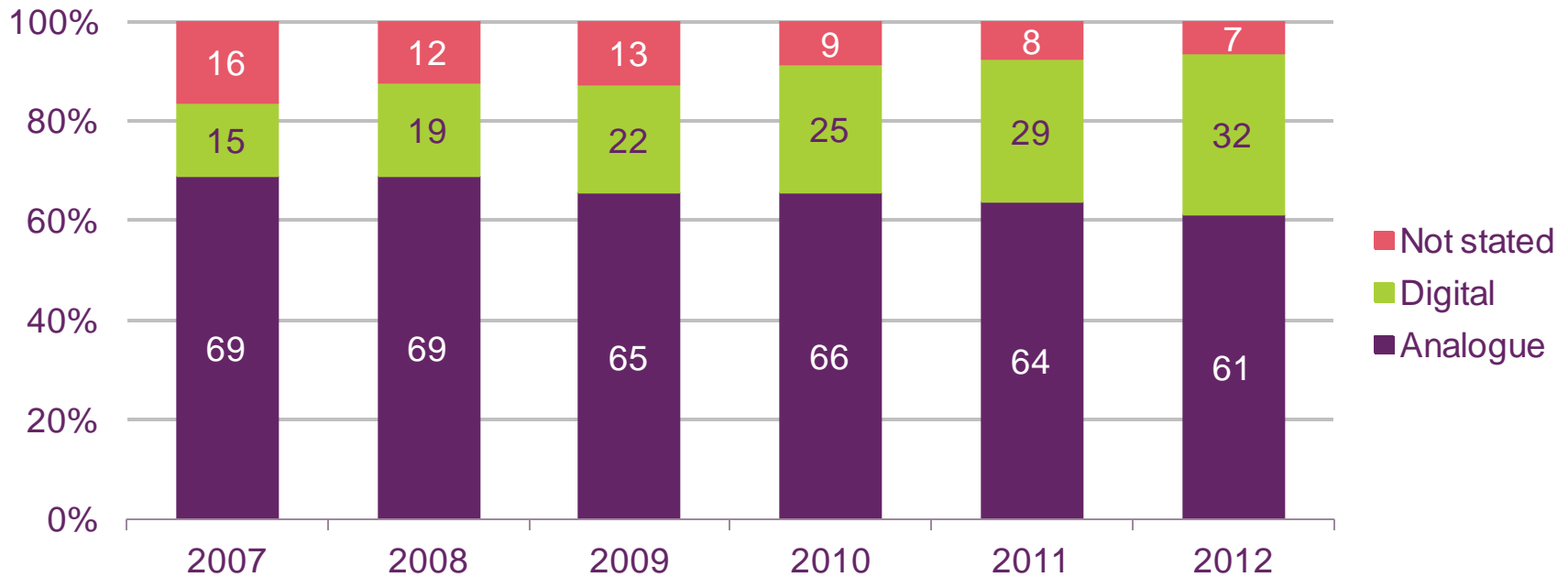
Digital listening year on year change (percentage points)



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

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

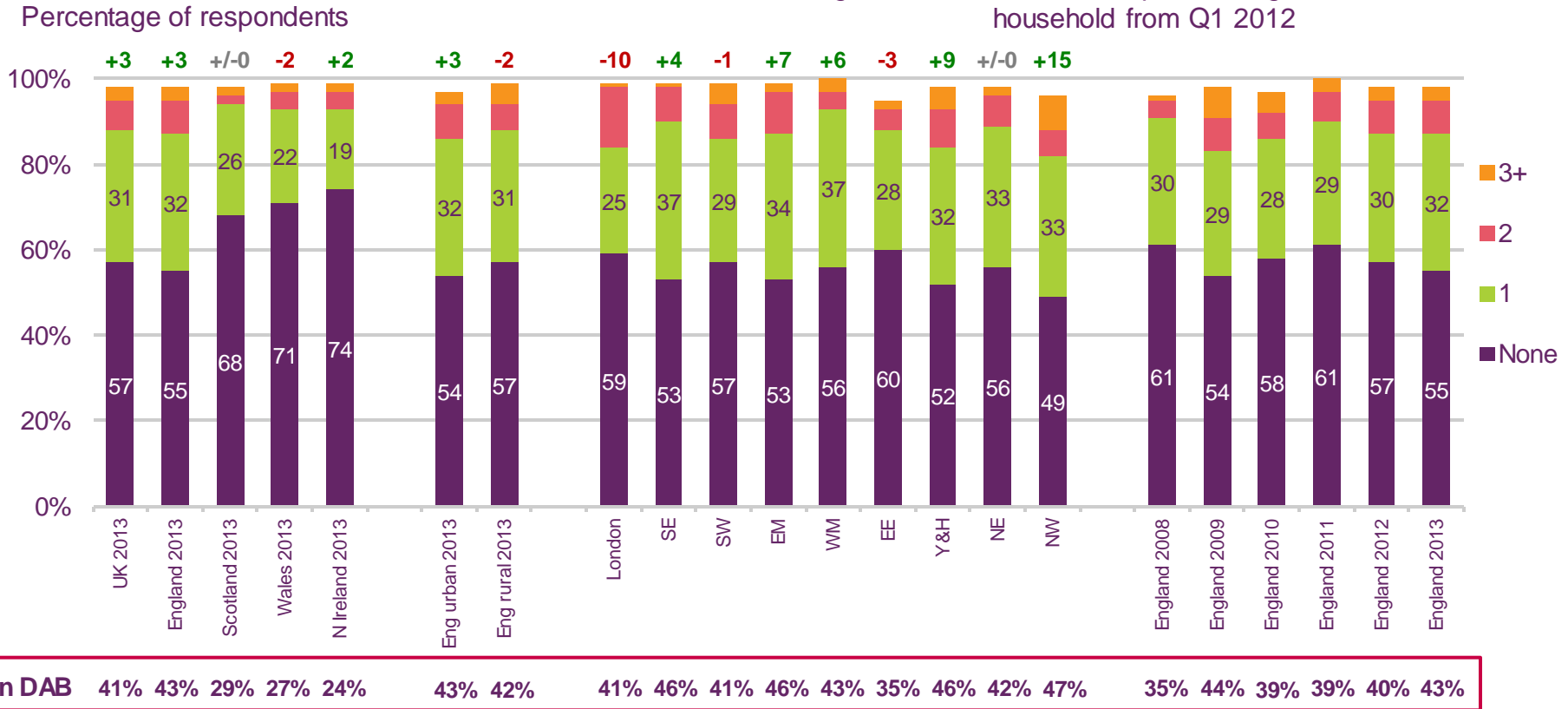
Share of total listening hours



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

Ownership of DAB digital radios

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



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, 1747 England, 375 Scotland, 383 Wales, 405 Northern Ireland, 1501 England urban, 246 England rural, 167 London, 222 South East, 208 South West, 189 East Midlands, 183 West Midlands, 218 East of England, 201 Yorkshire & Humber, 174 North East, 185 North West, 2870 England 2008, 2819 England 2009, 4476 England 2010, 1629 England 2011, 1790 England 2012, 1747 England 2013)

Note: Remaining percentages are Don't know responses.

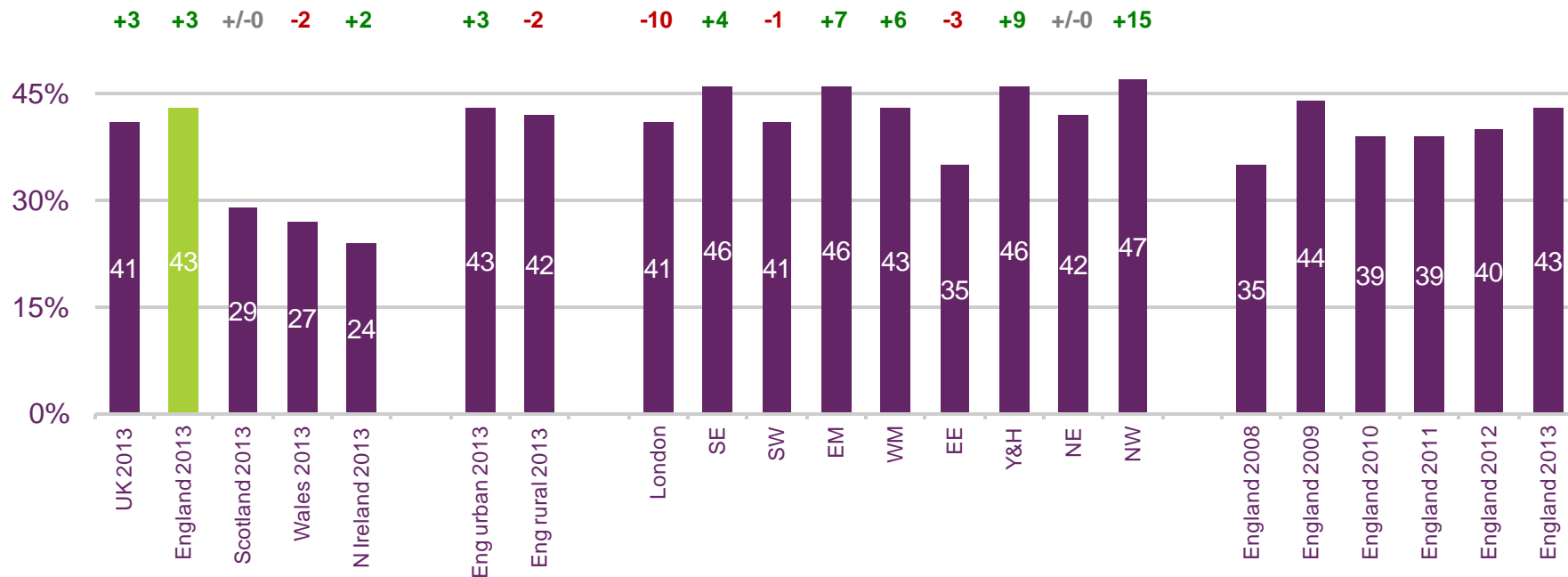
NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

Ownership of DAB digital radios



Percentage of respondents

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



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, 375 Scotland, 1747 England, 383 Wales, 405 Northern Ireland, 187 Scotland urban, 188 Scotland rural, 766 Scotland 2008, 780 Scotland 2009, 1034 Scotland 2010, 357 Scotland 2011, 364 Scotland 2012, 375 Scotland 2013)

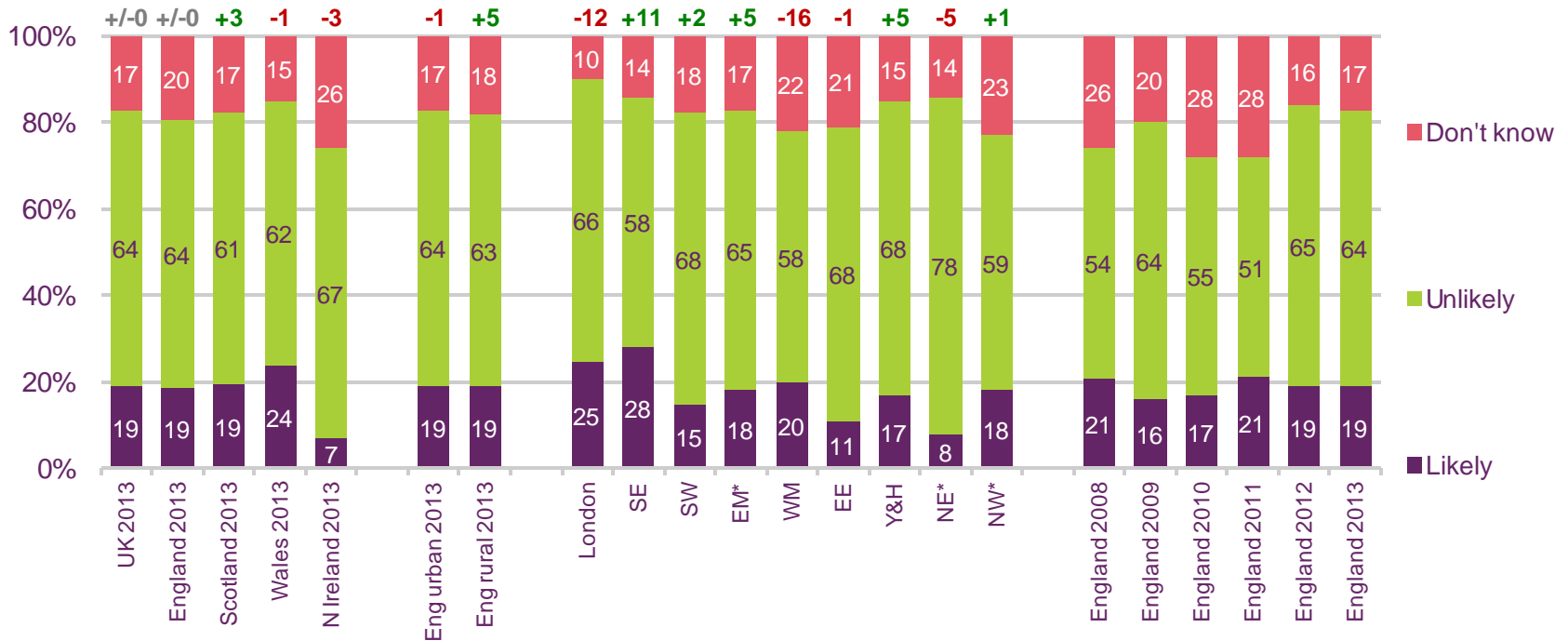
Note: Remaining percentages are Don't know responses.

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.

Likelihood of purchasing a DAB radio within the next year

Figure above bar shows % point change in likely to purchase from Q1 2012

Percentage of respondents



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

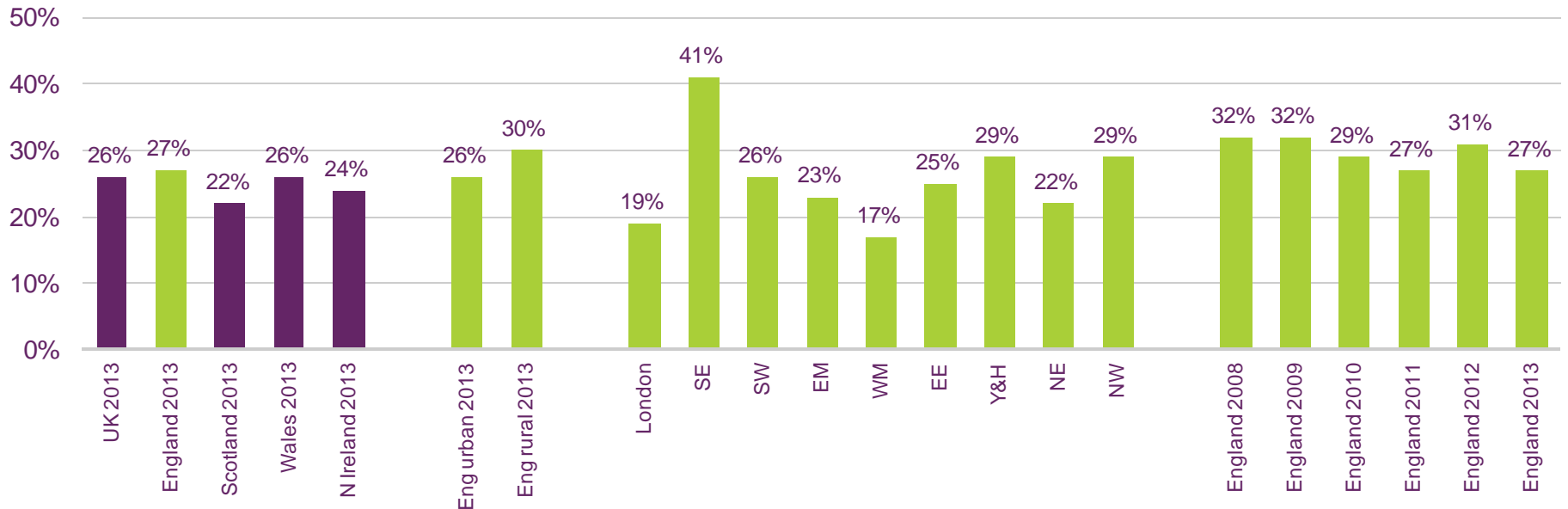
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1798 UK, 972 England, 257 Scotland, 269 Wales, 300 Northern Ireland, 833 England urban, 139 England rural, 101 London, 121 South East, 119 South West, 99 East Midlands, 105 West Midlands, 130 East of England, 106 Yorkshire & Humber, 99 North East, 92 North West, 1794 England 2008, 1706 England 2009, 2690 England 2010, 703 England 2011, 1034 England 2012, 972 England 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)



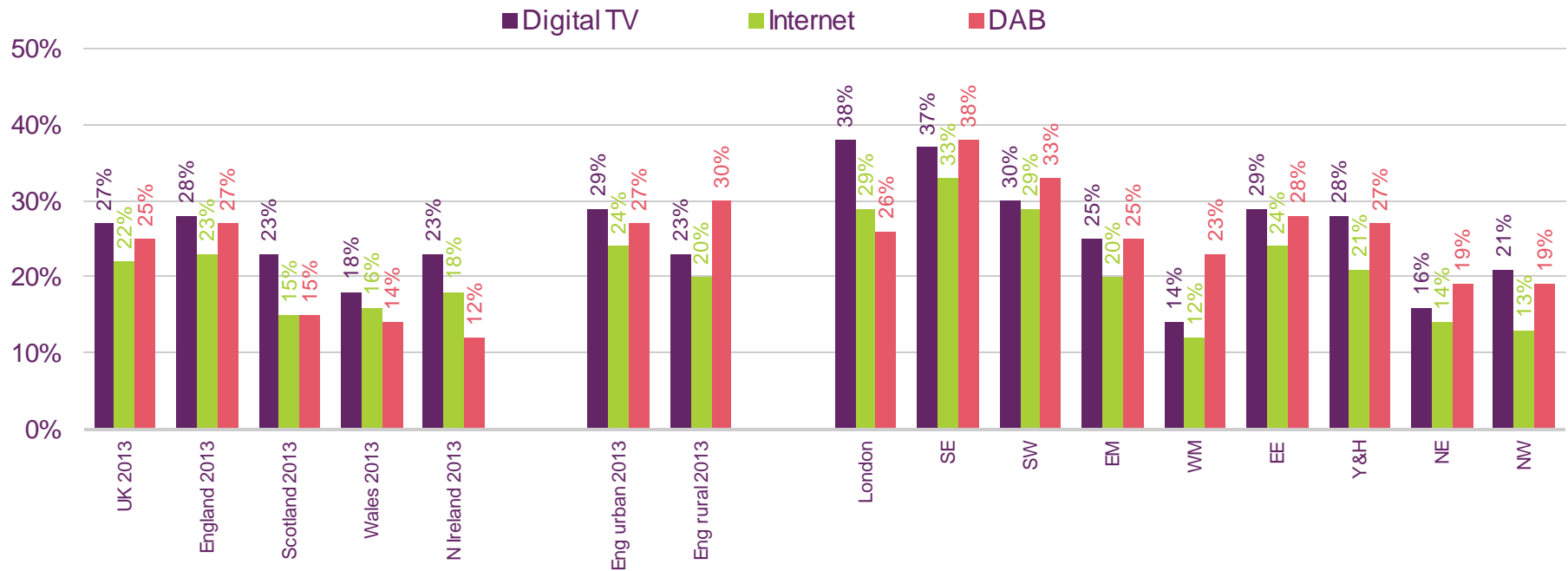
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Listening to radio via internet, DTV and DAB

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



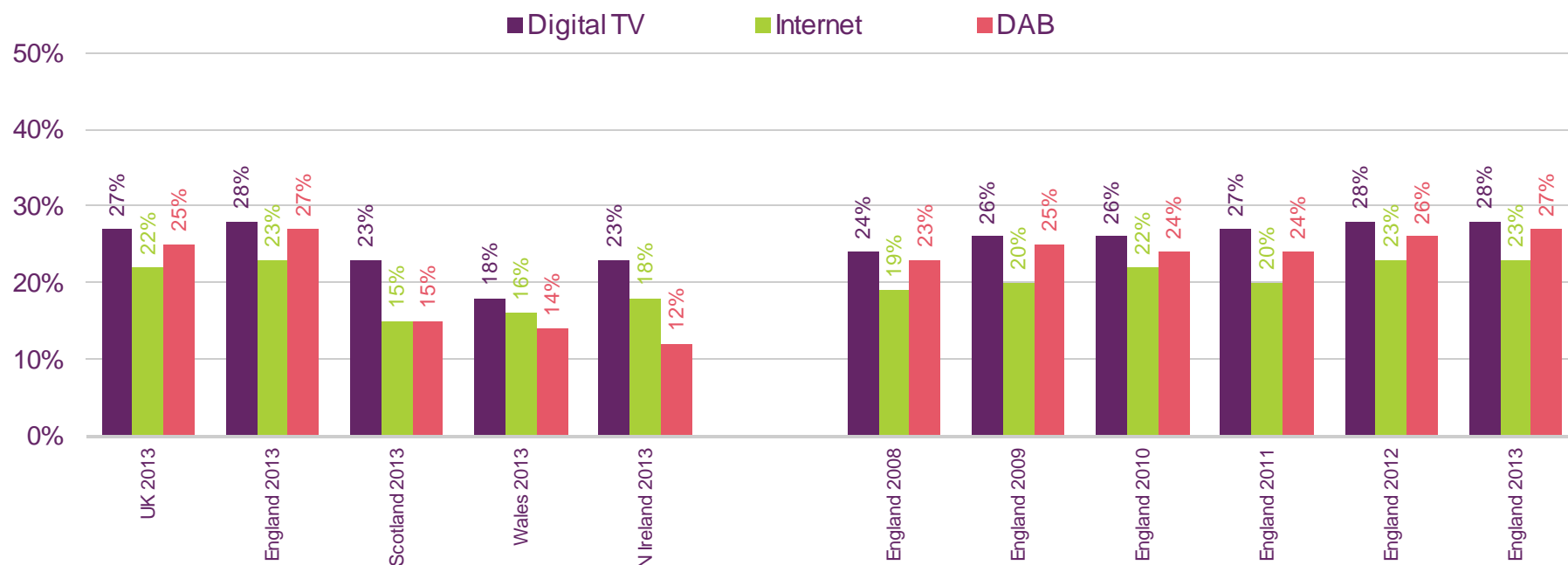
QP11. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio?/ QE5A. Which, if any, of these do you use the internet for? *Measure for Internet combines responses across radio listeners (at QP11) and internet users (at QE5A).

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Listening to radio via internet, DTV and DAB

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



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).

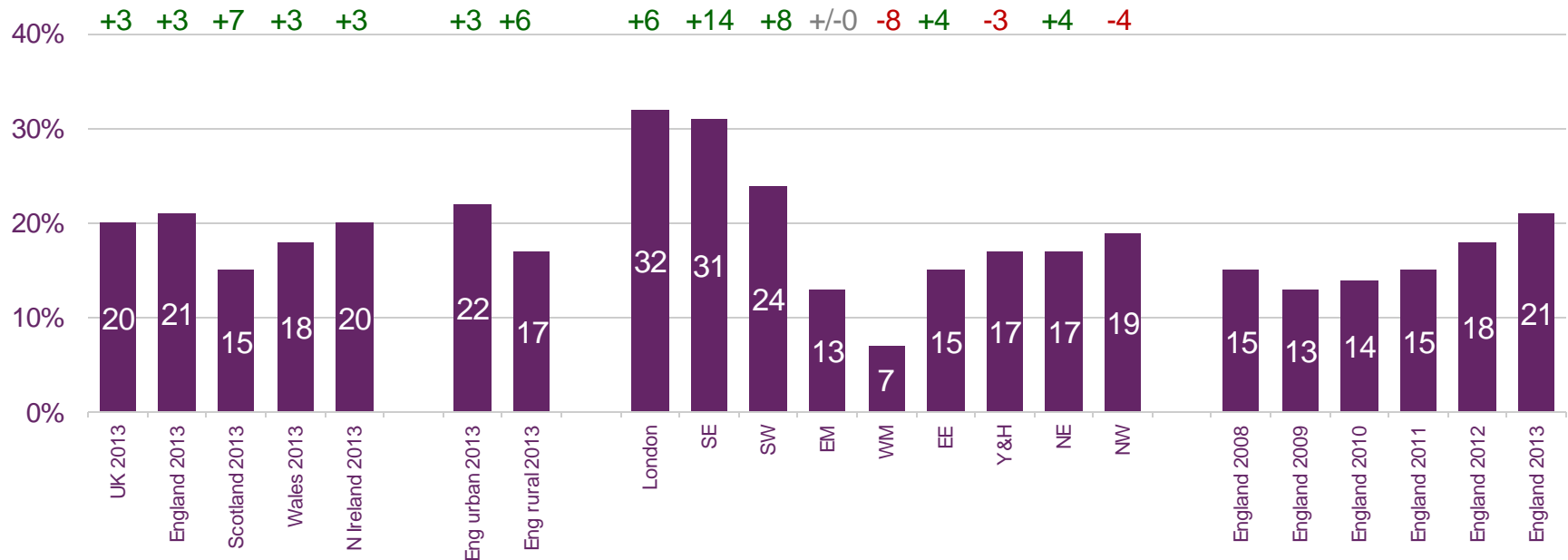
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 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?

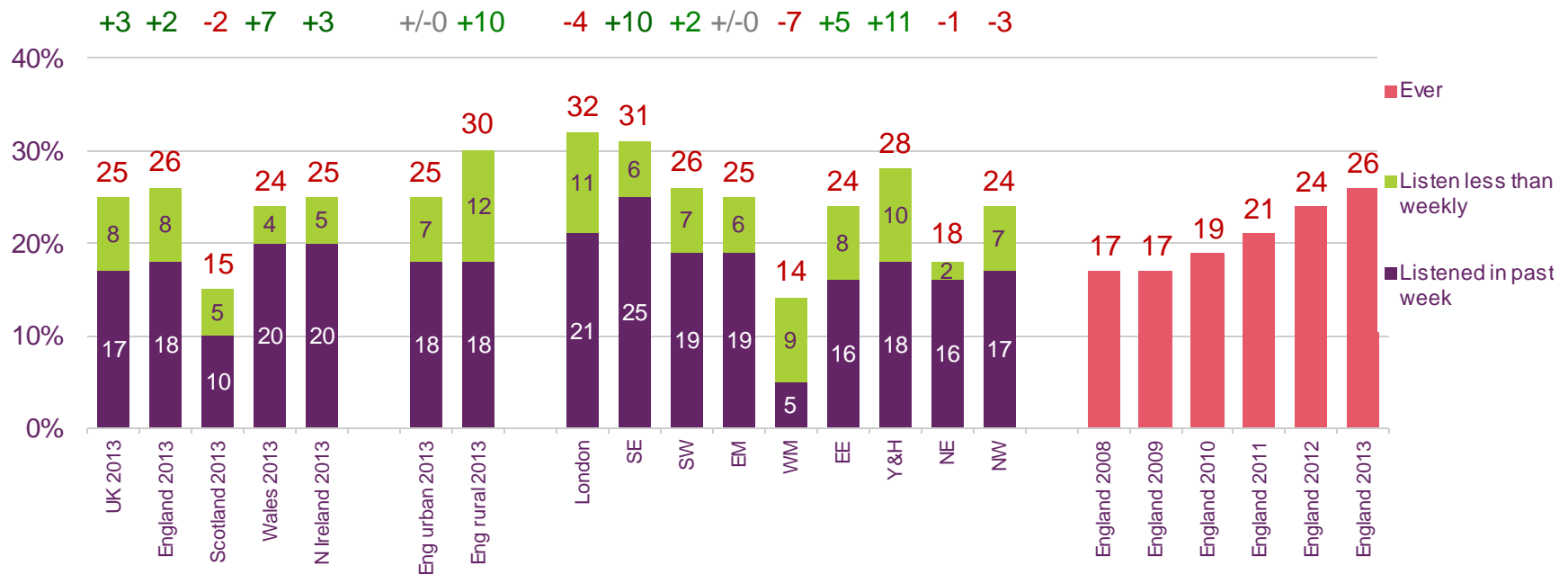
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 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

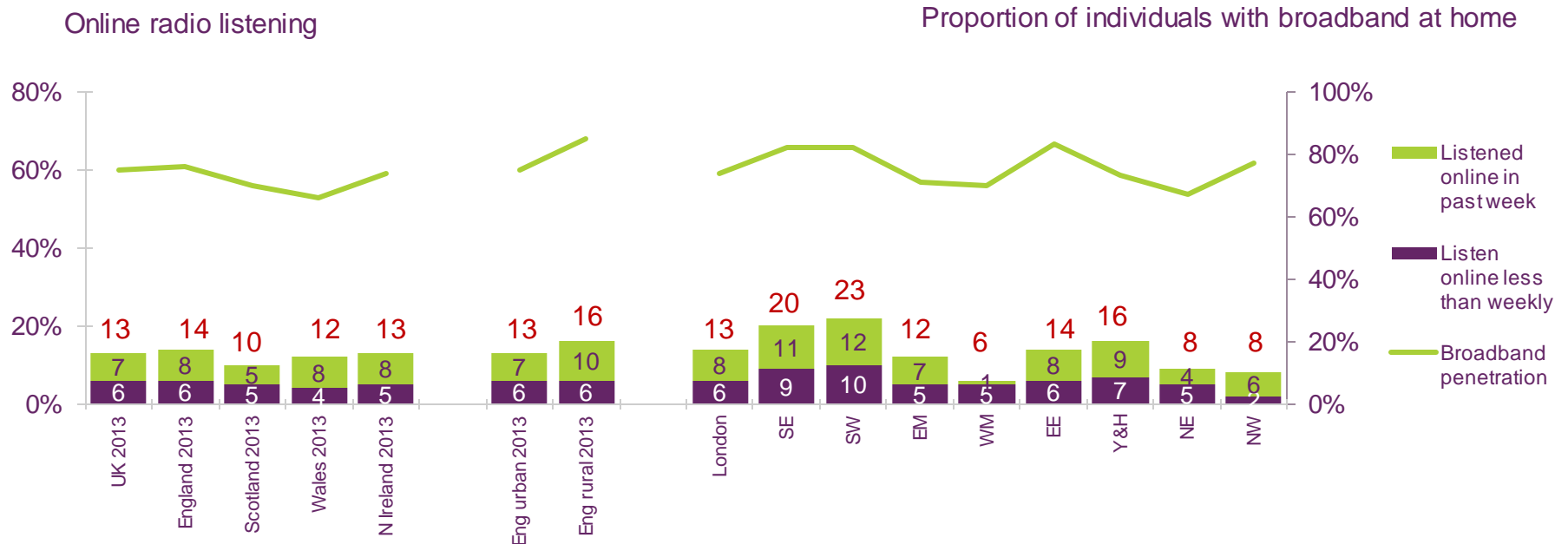


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever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

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Proportion of adults who listen to internet radio

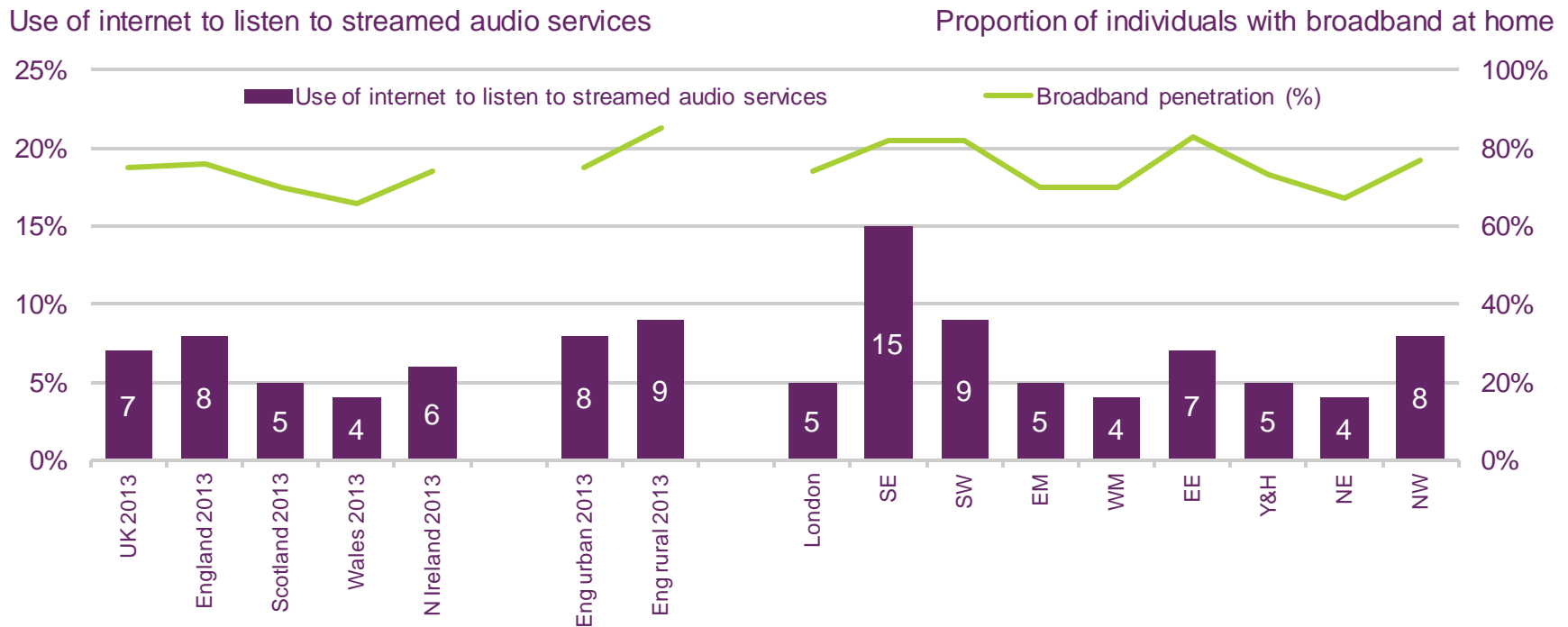


QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

Use of internet for listening to streamed audio services



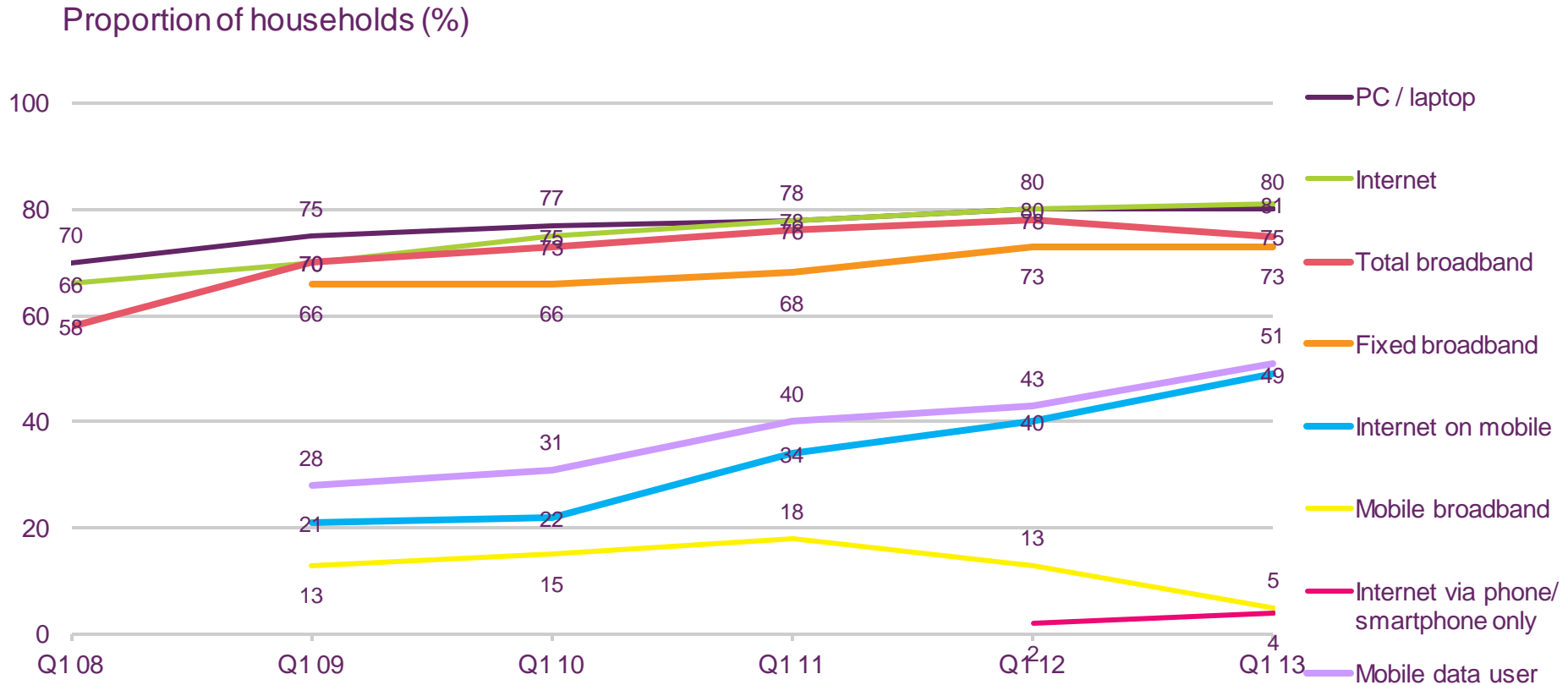
QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008)

Internet and web-based content

Household PC and internet take-up, England 2008-2013



Source: Ofcom technology tracker

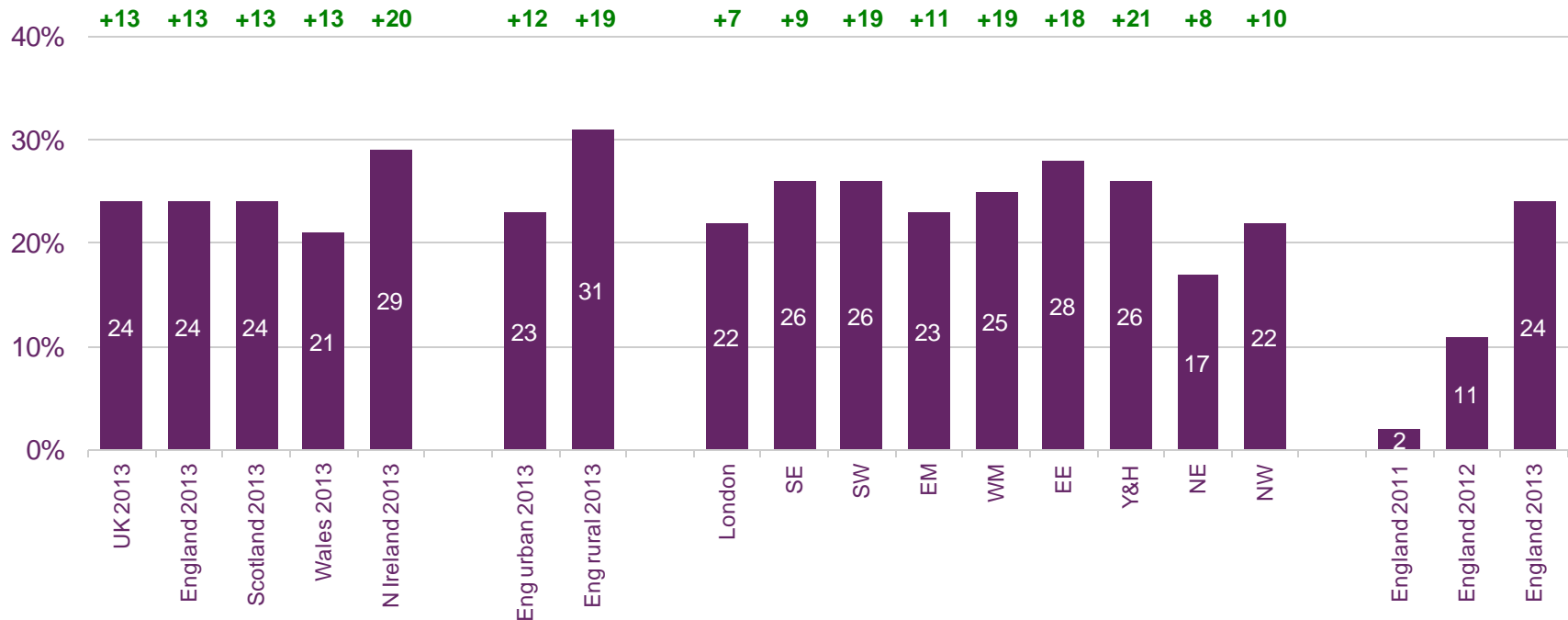
Base: All adults aged 16+ (n = 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

NB Internet total figure includes access via a mobile phone

Take-up of Tablet PCs

% homes with a tablet PC

Figure above bar shows % point change in take-up of Tablet PCs from Q1 2012

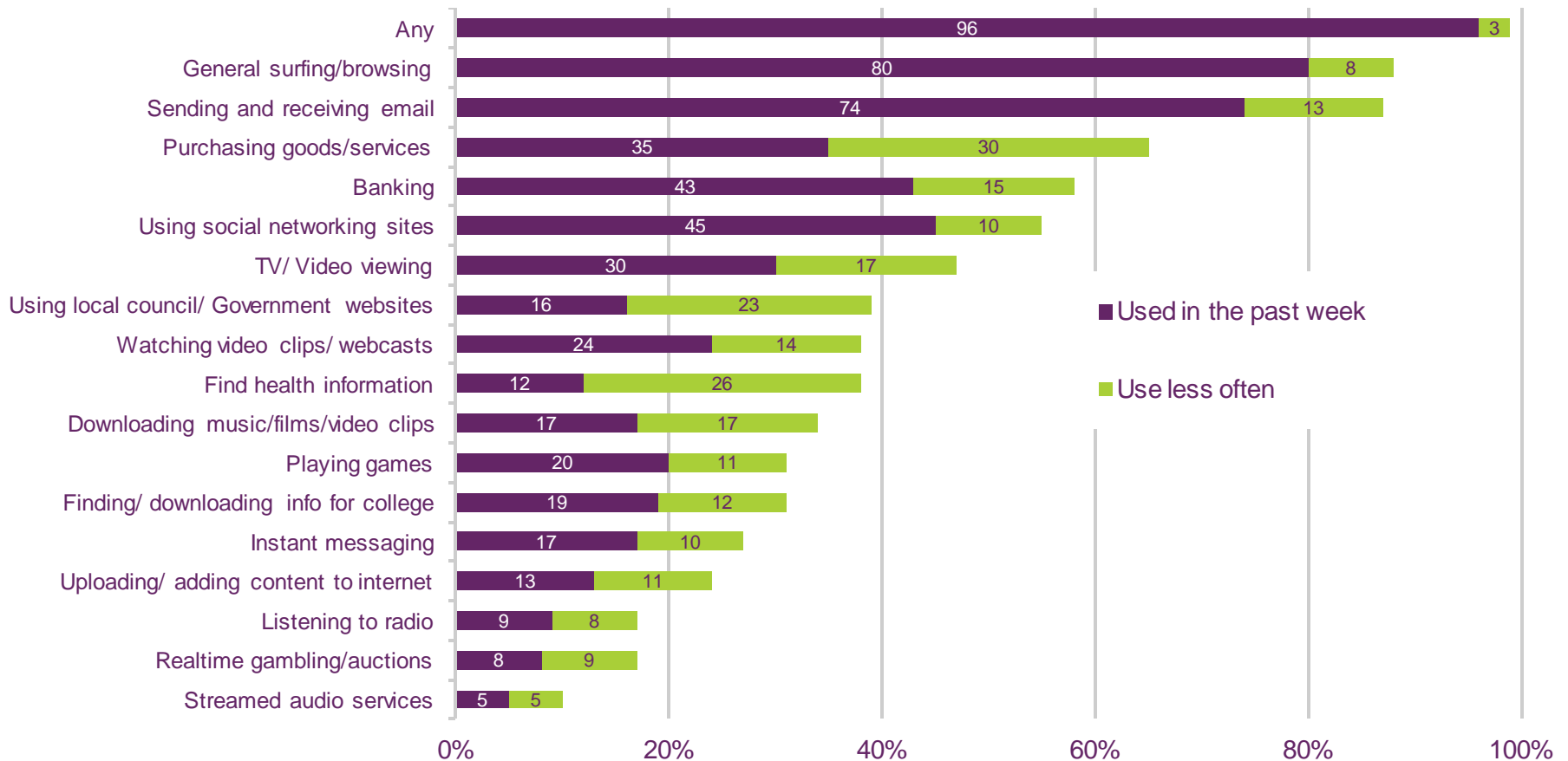


QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Use of online applications among broadband users



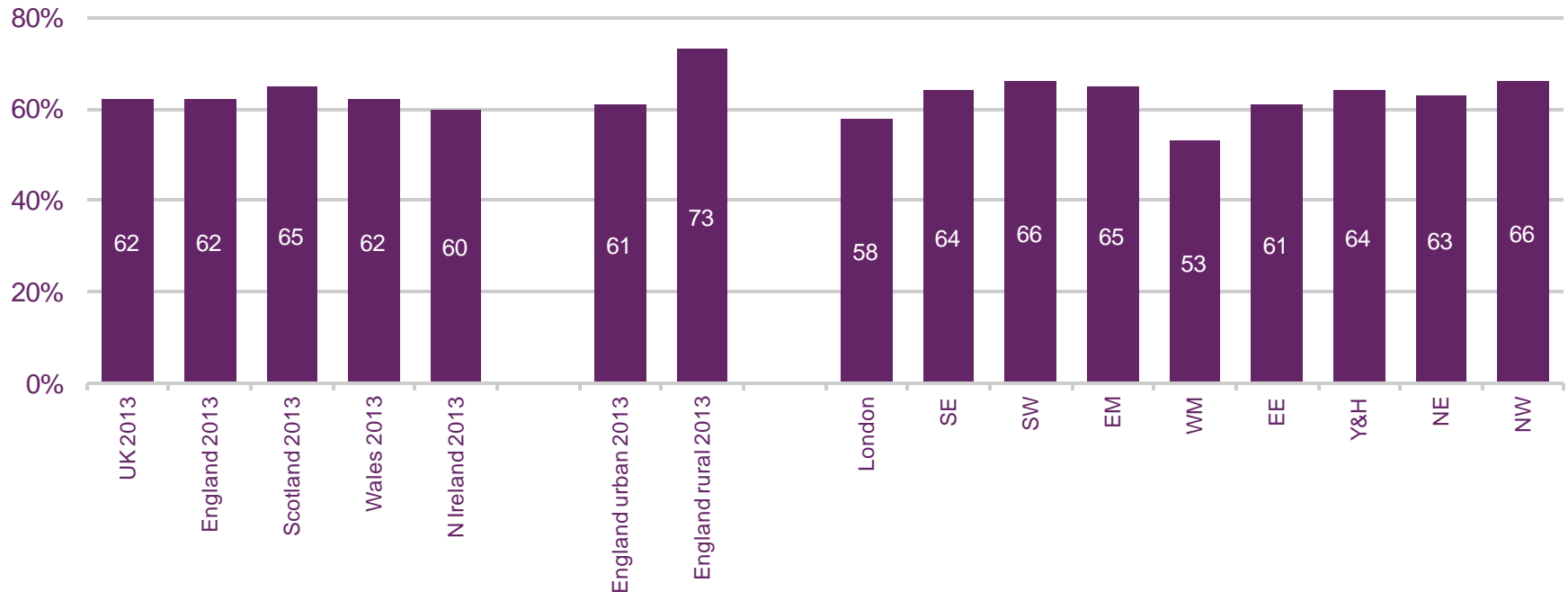
QE5. Which, if any, of these do you use the internet for?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a broadband connection at home (n= 1633 England 2013)

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?

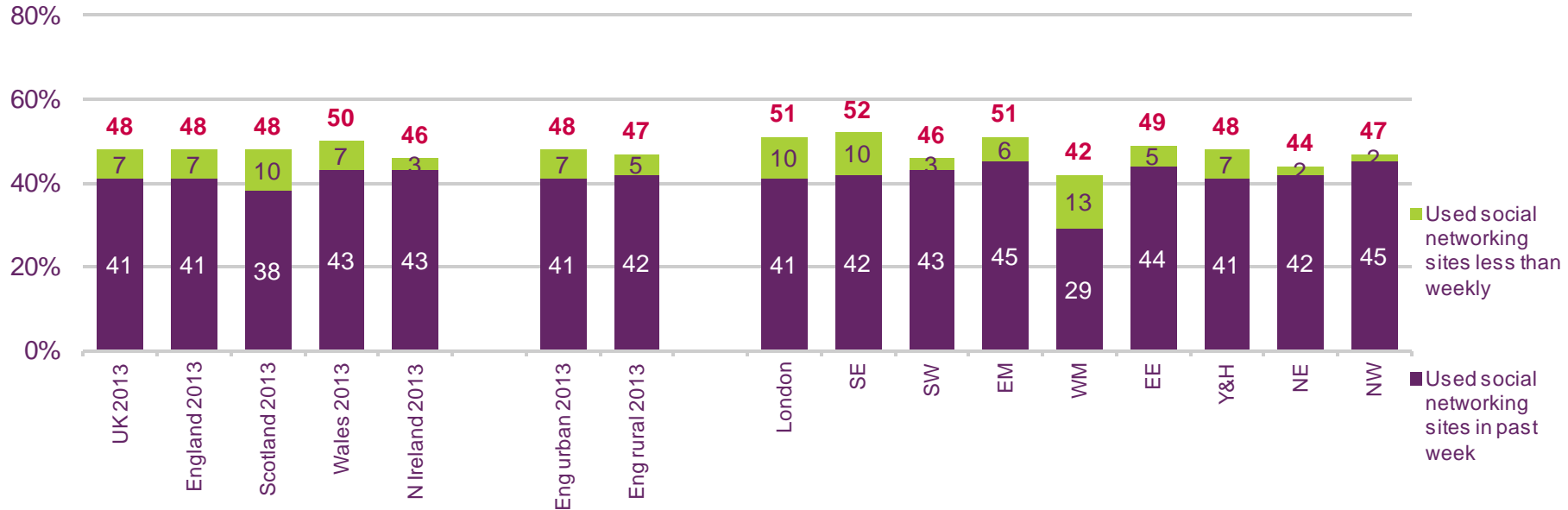
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK, 1787 England, 394 Scotland, 361 Wales, 376 Northern Ireland, 1545 England urban, 242 England rural, 197 London, 204 South East, 201 South West, 191 East Midlands, 187 West Midlands, 224 East of England, 197 Yorkshire & Humber, 184 North East, 202 North West)

Use of social networking sites

Use of social networking sites (%)

Figure above bar shows year on year change



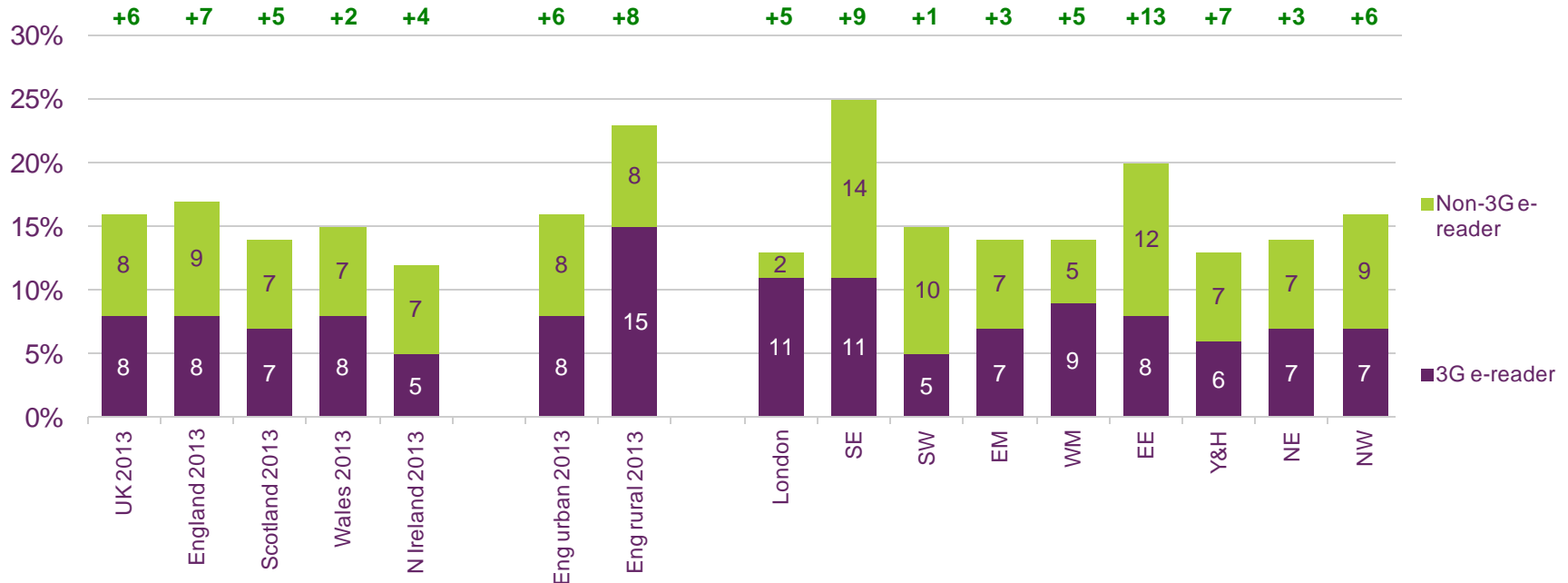
QE5A-B. Which, if any, of these do you use the internet for?/ And, which, if any, of these activities have you used the internet for in the last week?/
 QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

Personal use of e-readers

Figure above bar shows year on year change



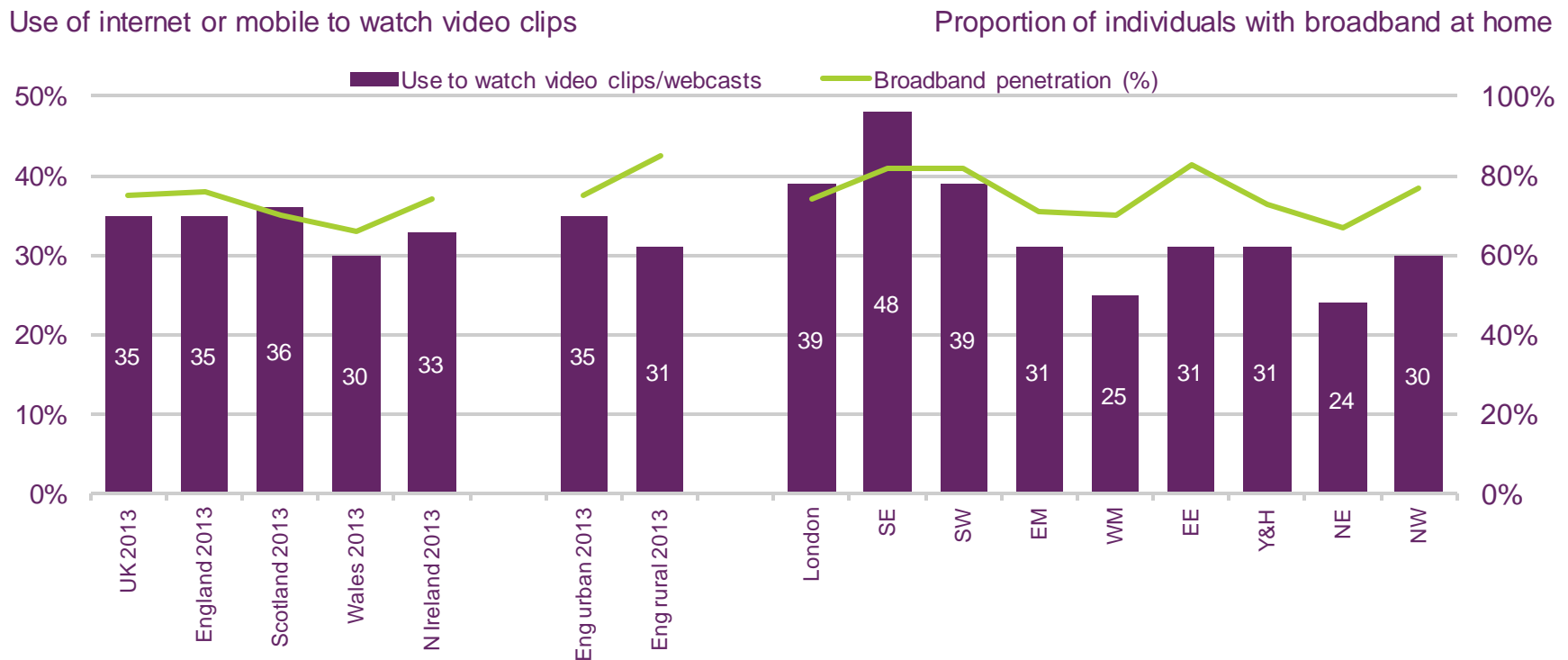
Household take-up	22%	22%	20%	22%	22%	21%	31%	16%	32%	17%	20%	18%	28%	22%	21%	23%
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QB1. Which of the following do you, or does anyone in your household, have in your home at the moment ?/ QB2. And do you personally use.../ QB6. Does your household's 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West)

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

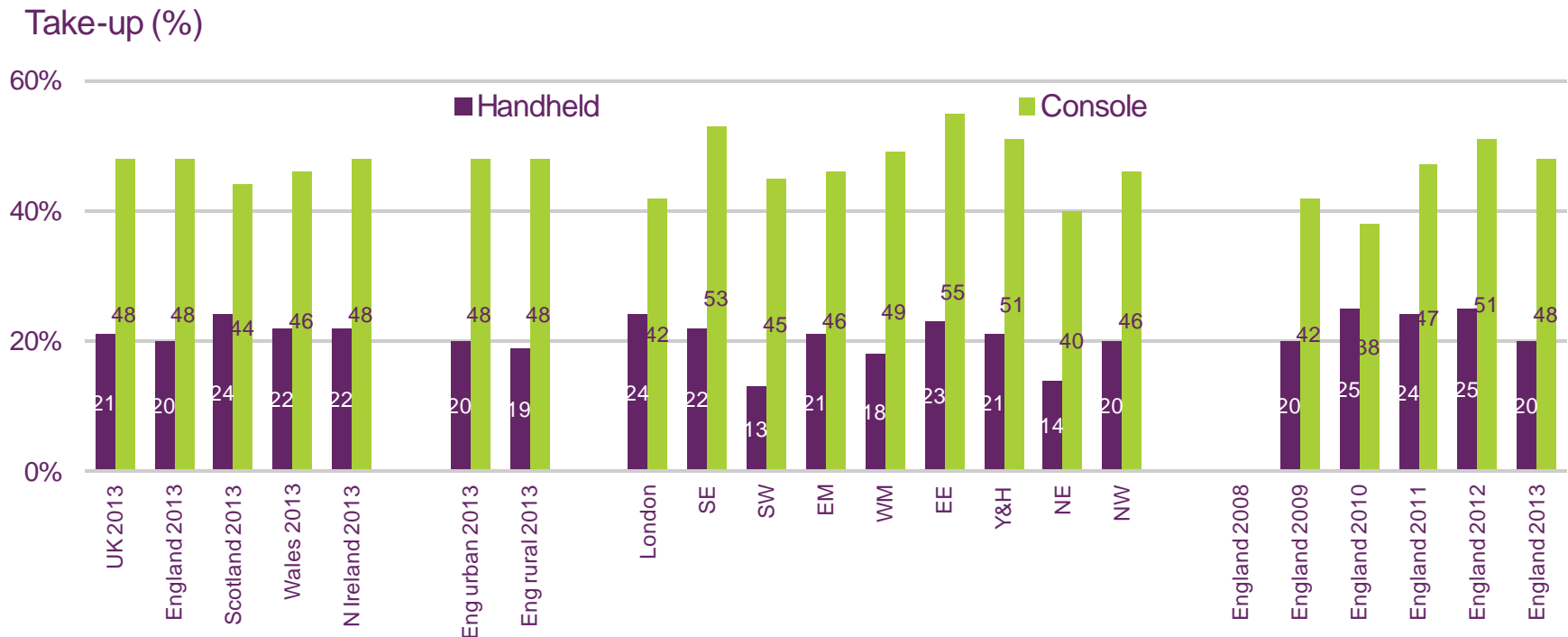


QE5A. Which, if any, of these do you use the internet for?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about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

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West, 252 North East, 252 North West)

Take up of leading games consoles in England



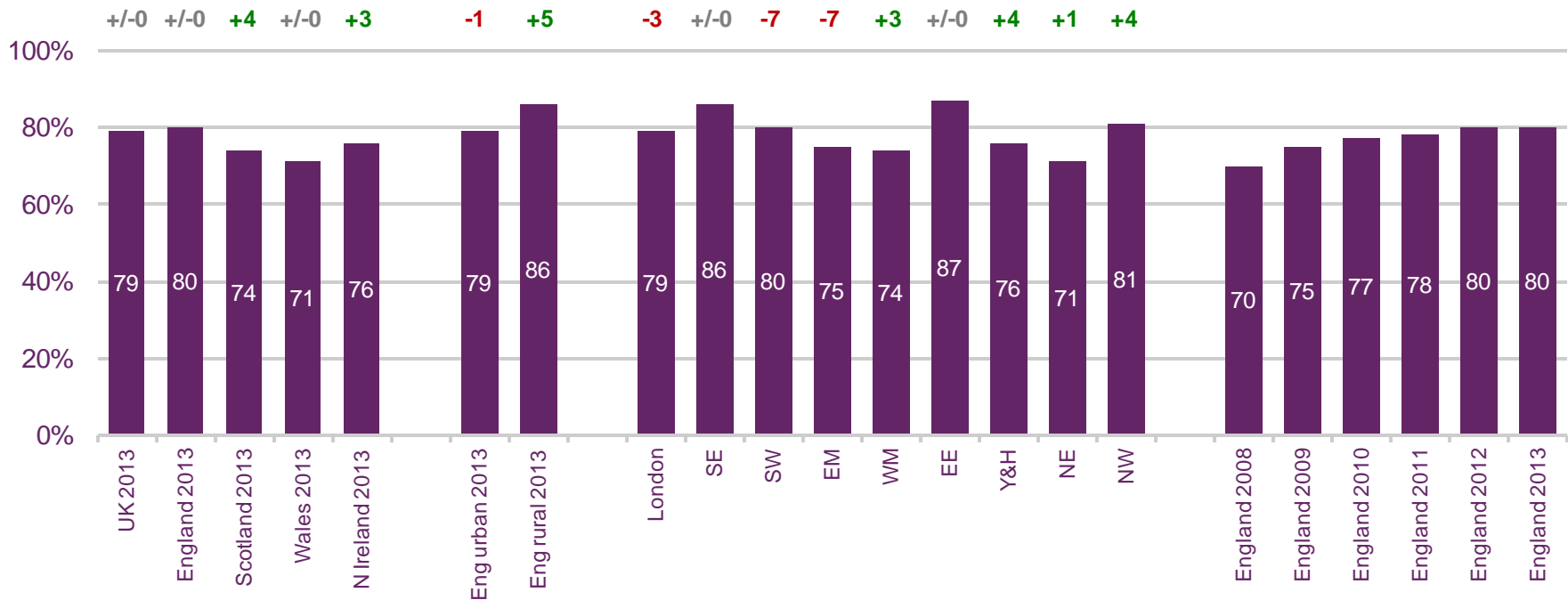
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

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

Figure above bar shows % 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 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)

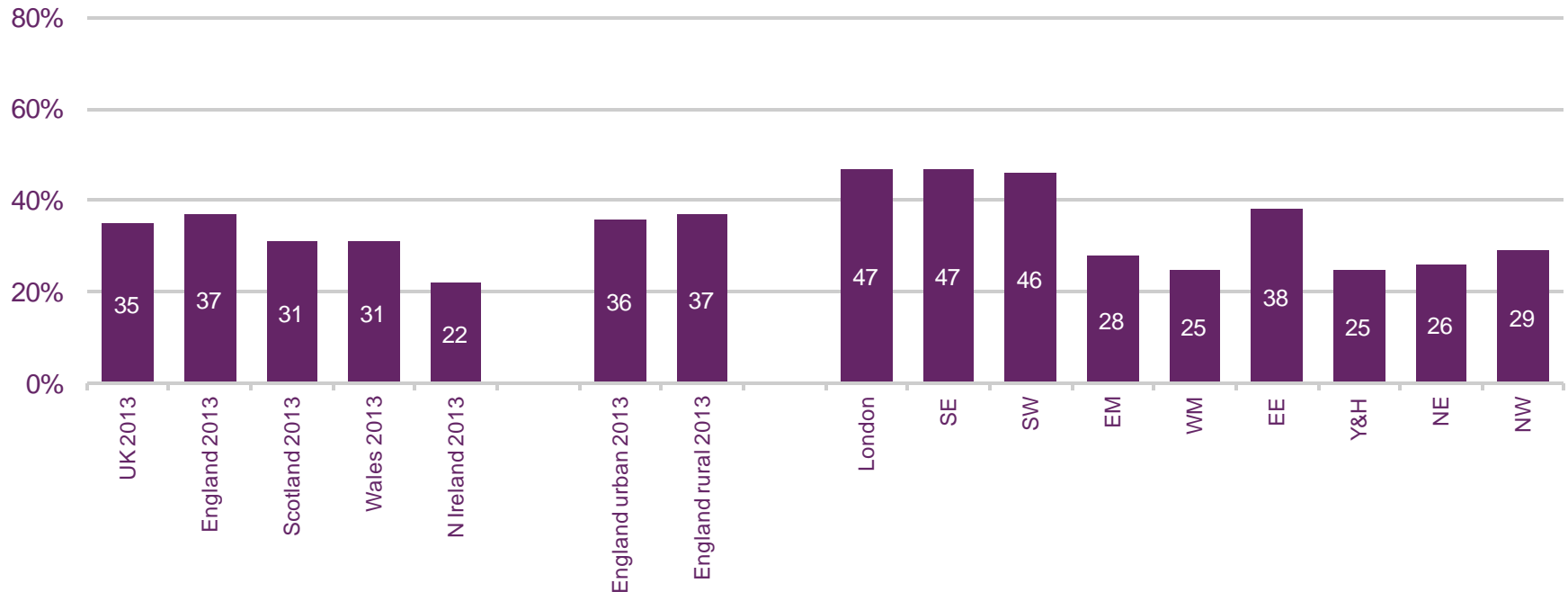
QE5A-B. Which, if any, of these do you use the internet for? *NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

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.

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, 1787 England, 394 Scotland, 361 Wales, 376 Northern Ireland, 1545 England urban, 242 England rural, 197 London, 204 South East, 201 South West, 191 East Midlands, 187 West Midlands, 224 East of England, 197 Yorkshire & Humber, 184 North East, 202 North West)

Telecoms and networks

Proportion of premises connected to an ADSL-enabled BT exchange

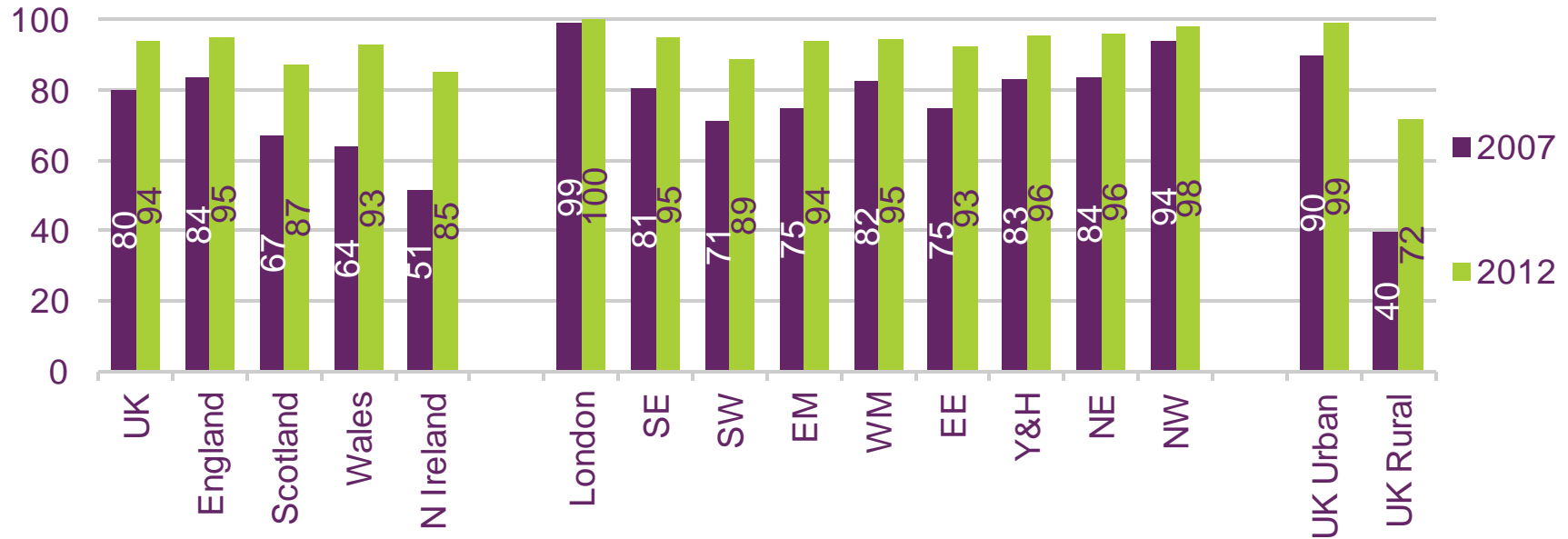
Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

Proportion of premises in connected to an unbundled local exchange

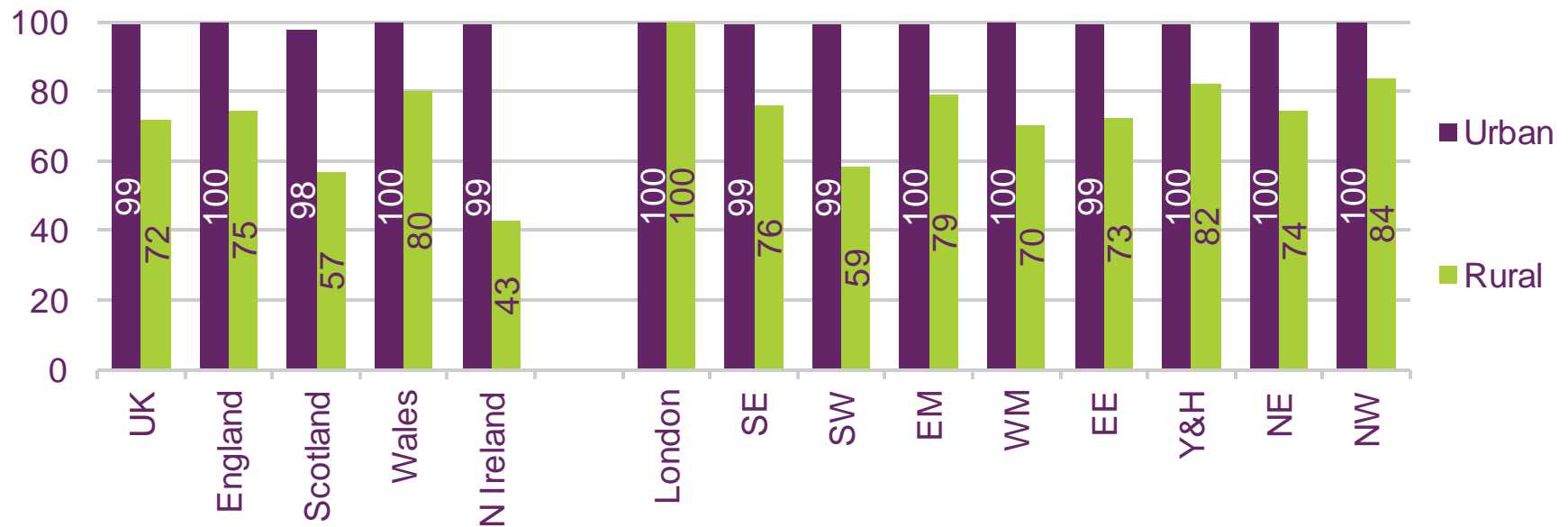
Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

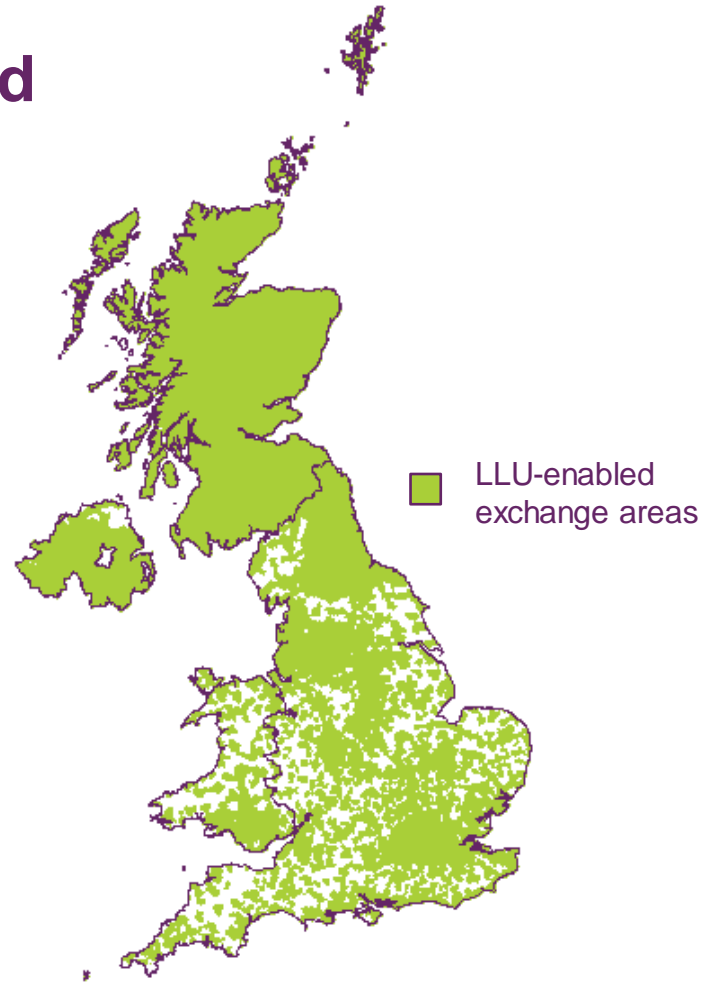
Proportion of premises in urban and rural areas connected to an unbundled exchange

Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

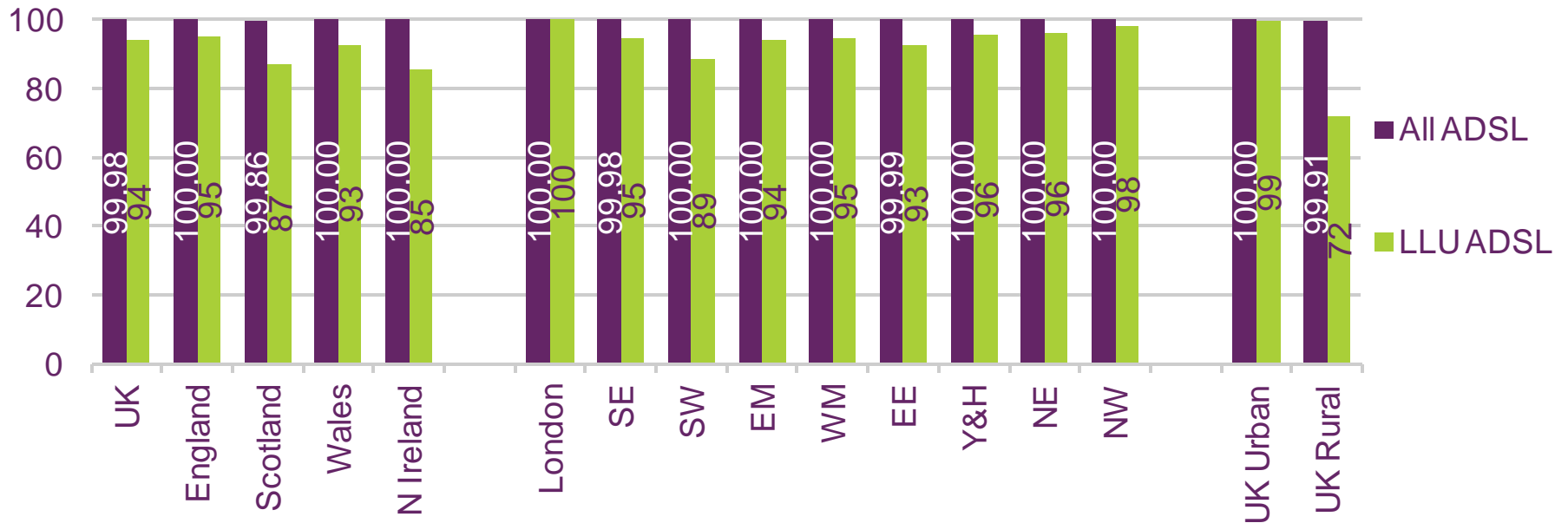
Map showing areas served by unbundled local exchanges



Source: Ofcom / BT, December 2012 data

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

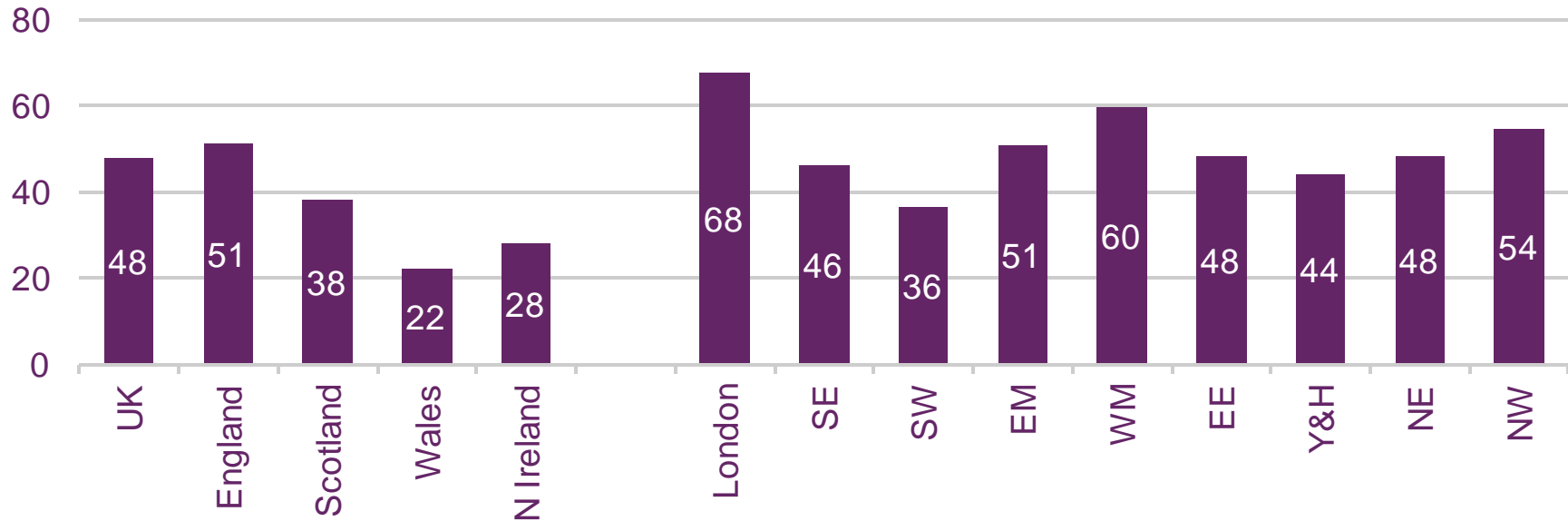
Proportion of premises (per cent)



Source: Ofcom / BT, December 2012 data

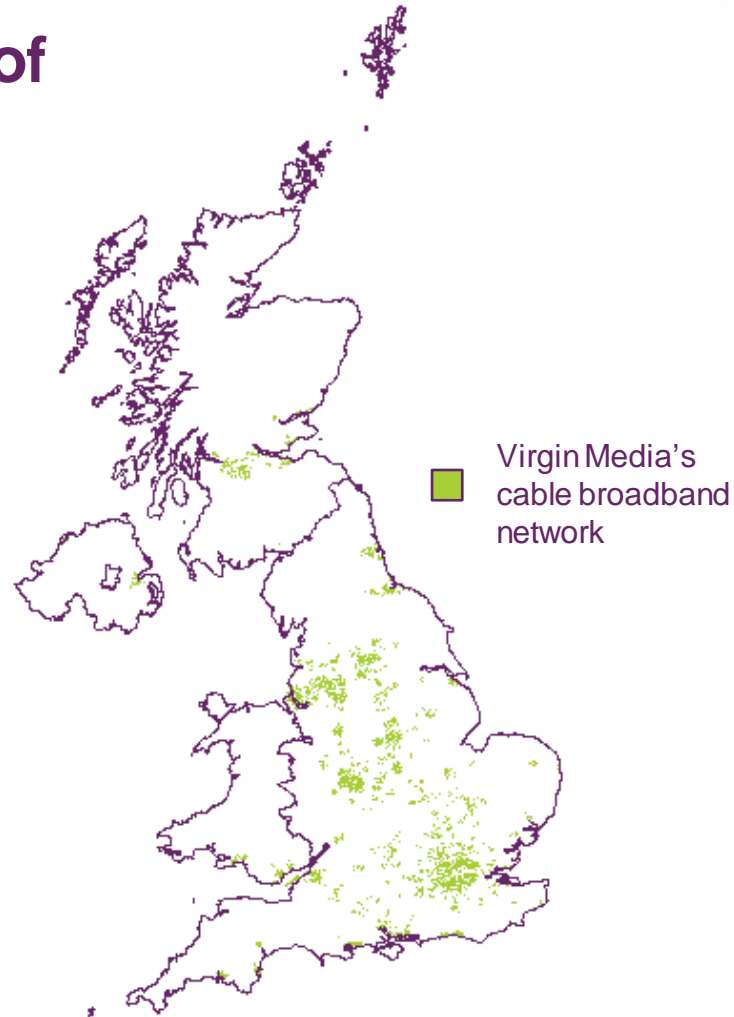
Proportion of premises passed by Virgin Media cable broadband

Proportion of premises (per cent)



Source: Ofcom / Virgin Media, June 2013 data

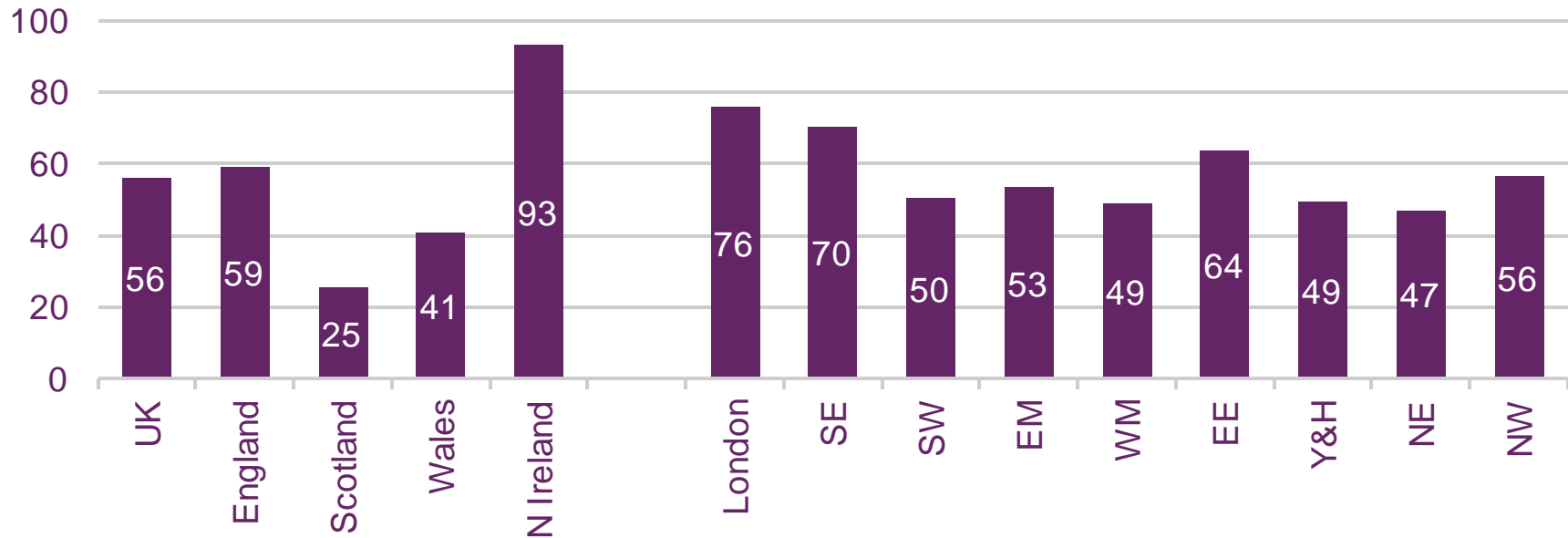
Map of the availability of Virgin Media's cable broadband network



Source: Ofcom / Virgin Media, June 2013 data

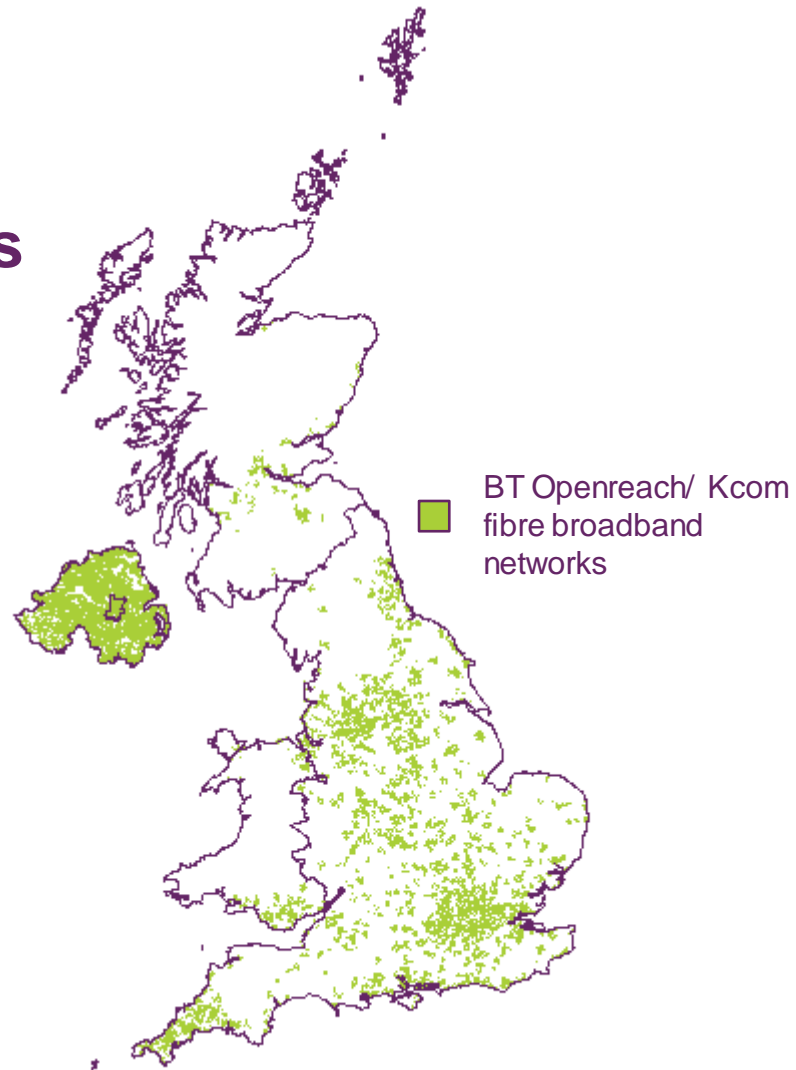
Proportion of premises in postcodes served by BT Openreach/ Kcom's fibre broadband network

Proportion of premises (per cent)



Source: Ofcom / operators, June 2013 data

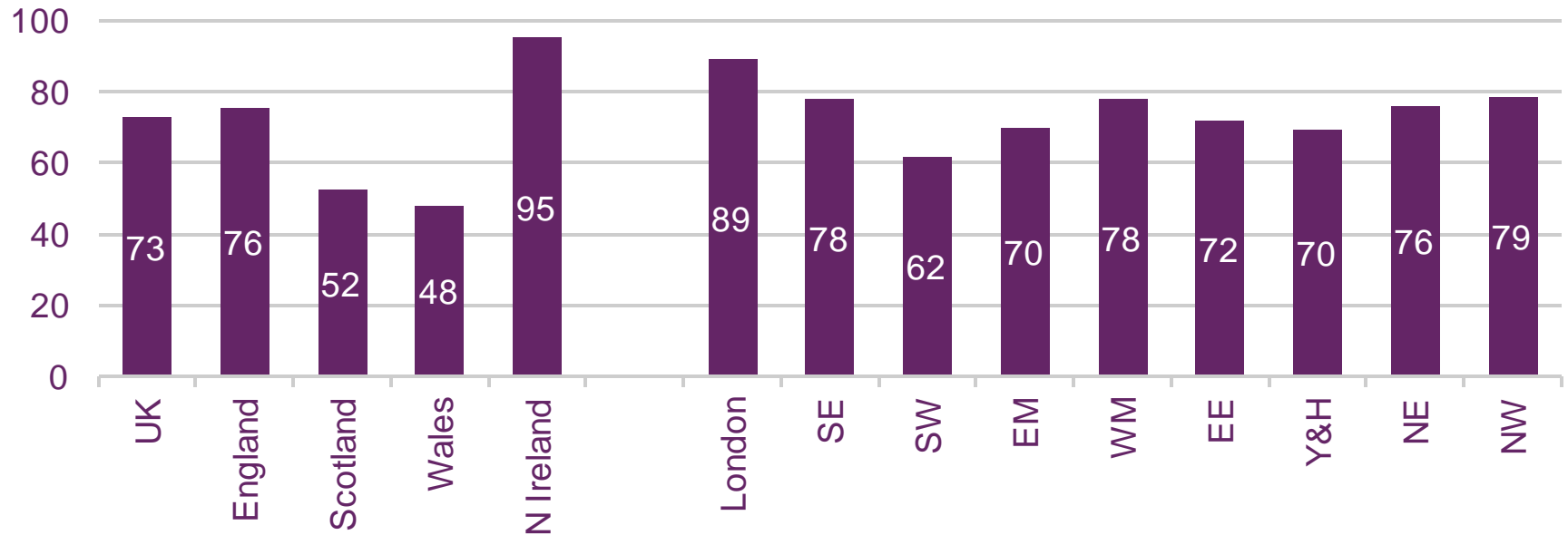
Map of the availability of BT Openreach/ Kcom's fibre broadband networks



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

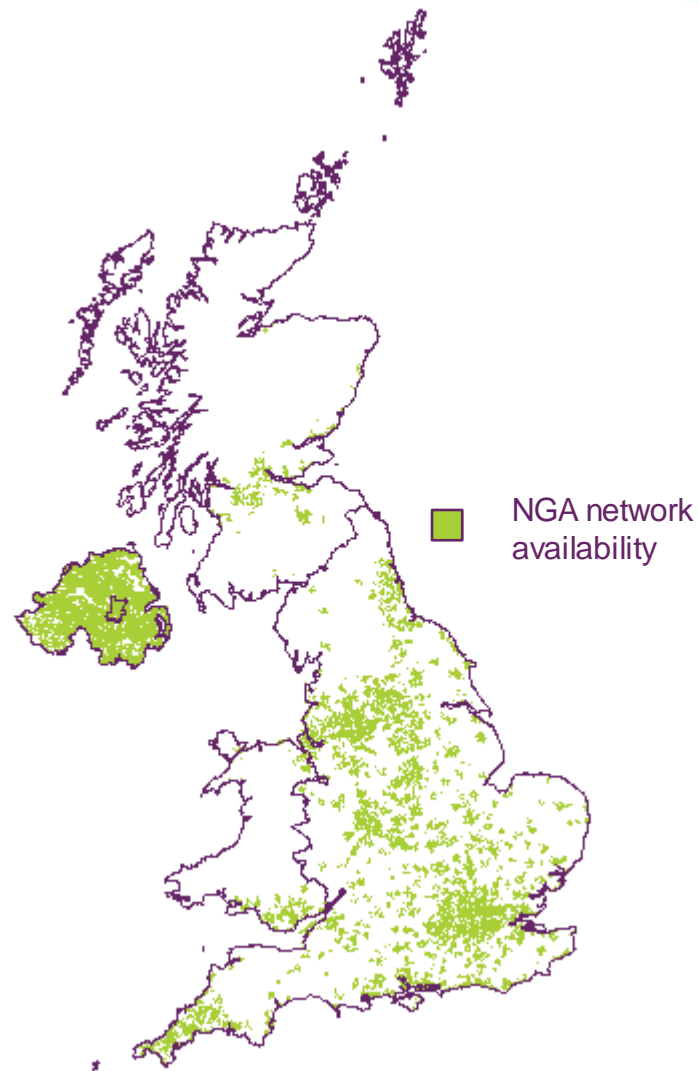
Proportion of premises in postcodes served by NGA networks

Proportion of premises (per cent)



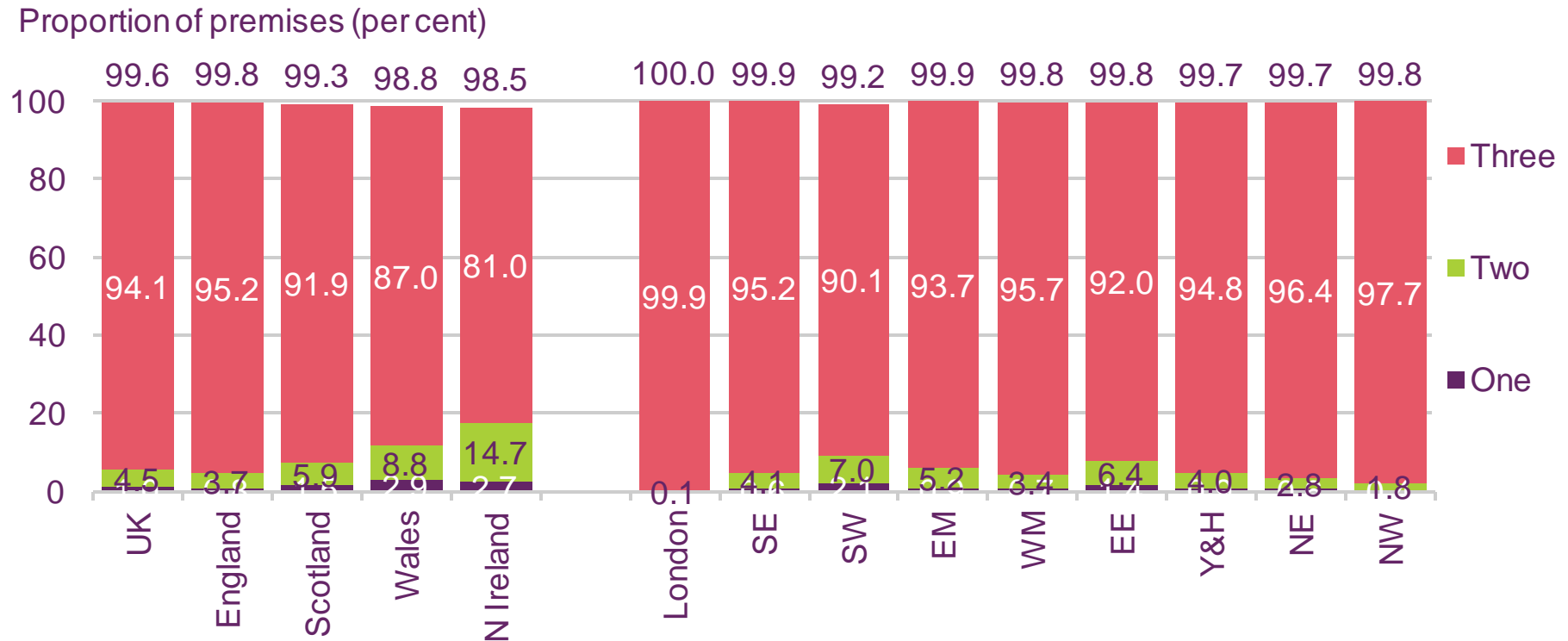
Source: Ofcom / operators, June 2013 data

Map of the availability of NGA networks



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

2G mobile premises coverage, by number of operators

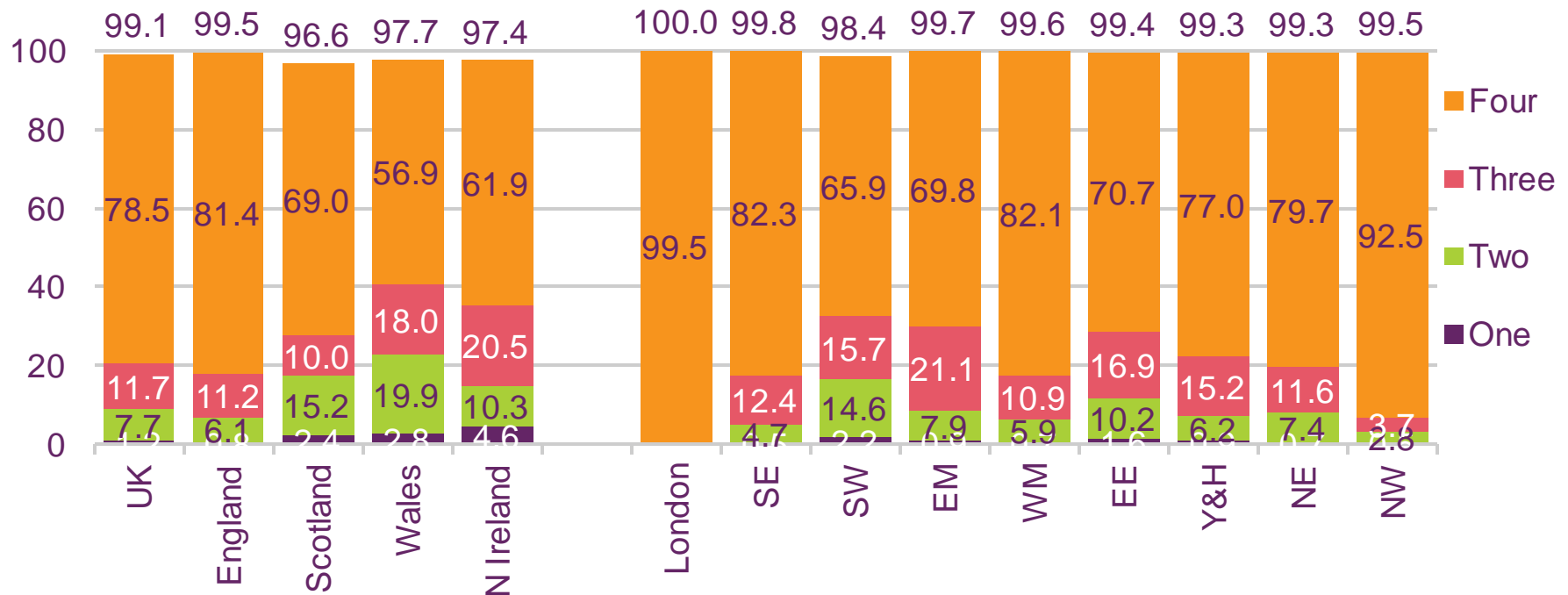


Source: Ofcom based on operator data.

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	England	Scotland	Wales	N Ireland	England urban	England rural
Individual								
Voice telephony	Fixed Line	84%	85%	83%	76%	82%	84%	93%
	Mobile phone	92%	92%	92%	92%	94%	91%	93%
	Smartphone	51%	52%	45%	49%	45%	52%	53%
	Mobile-only homes	15%	15%	16%	23%	18%	16%	7%
Internet	Total Internet	80%	81%	76%	75%	78%	80%	88%
	Broadband (fixed and mobile)	75%	76%	70%	66%	74%	75%	85%
	Fixed Broadband	72%	73%	67%	63%	71%	72%	83%
	Mobile Broadband	5%	5%	7%	7%	5%	5%	4%
	Mobile internet	49%	49%	44%	47%	45%	49%	50%

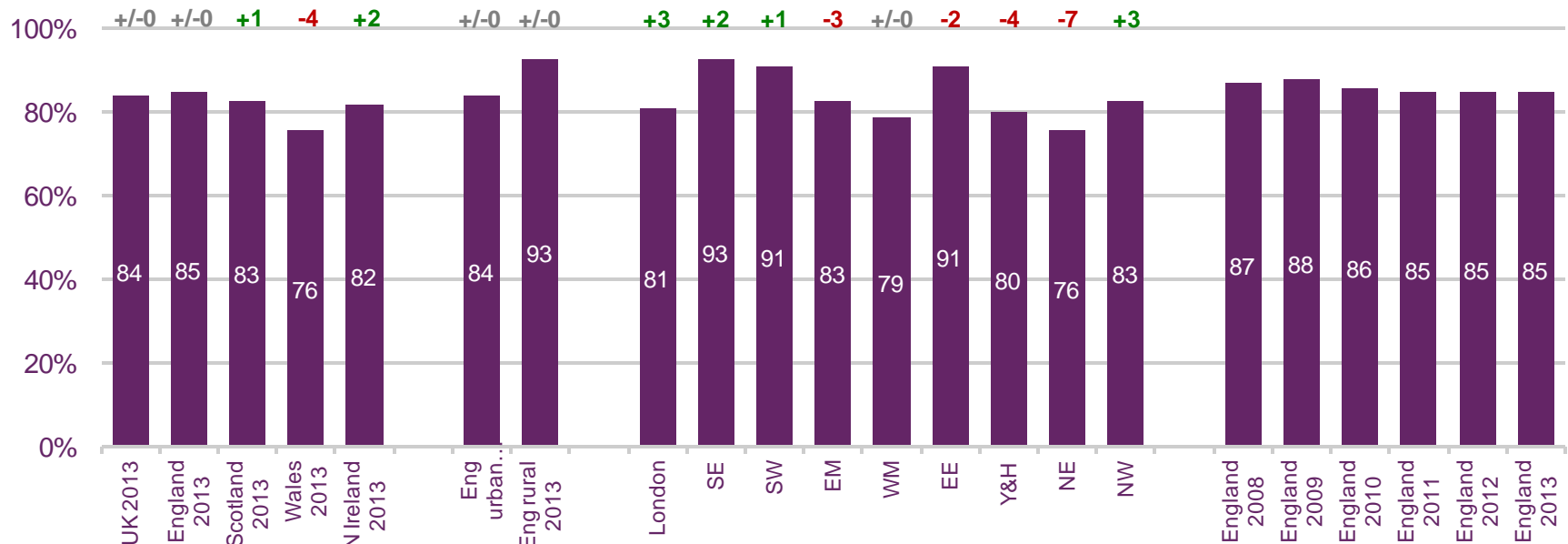
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QD24B. Do you personally use a smartphone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the Internet/ 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural)

Fixed line take-up

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



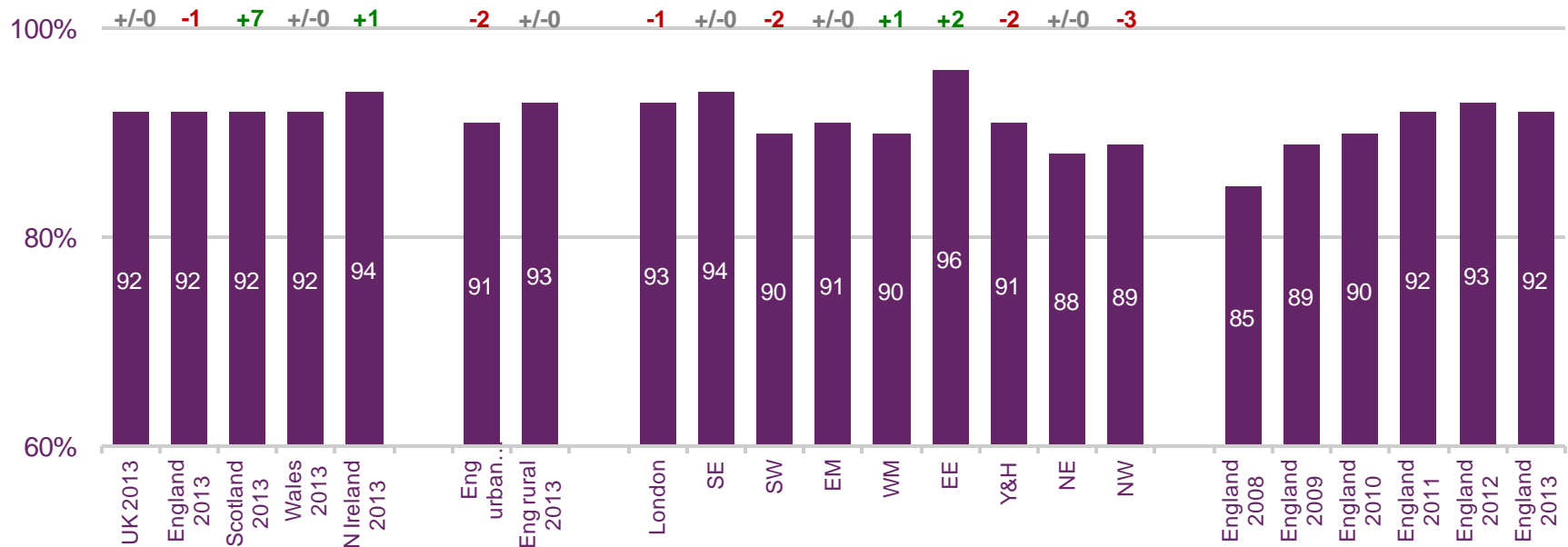
QC1. Is there a landline phone in your home that can be used to make and receive calls?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Mobile take-up

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



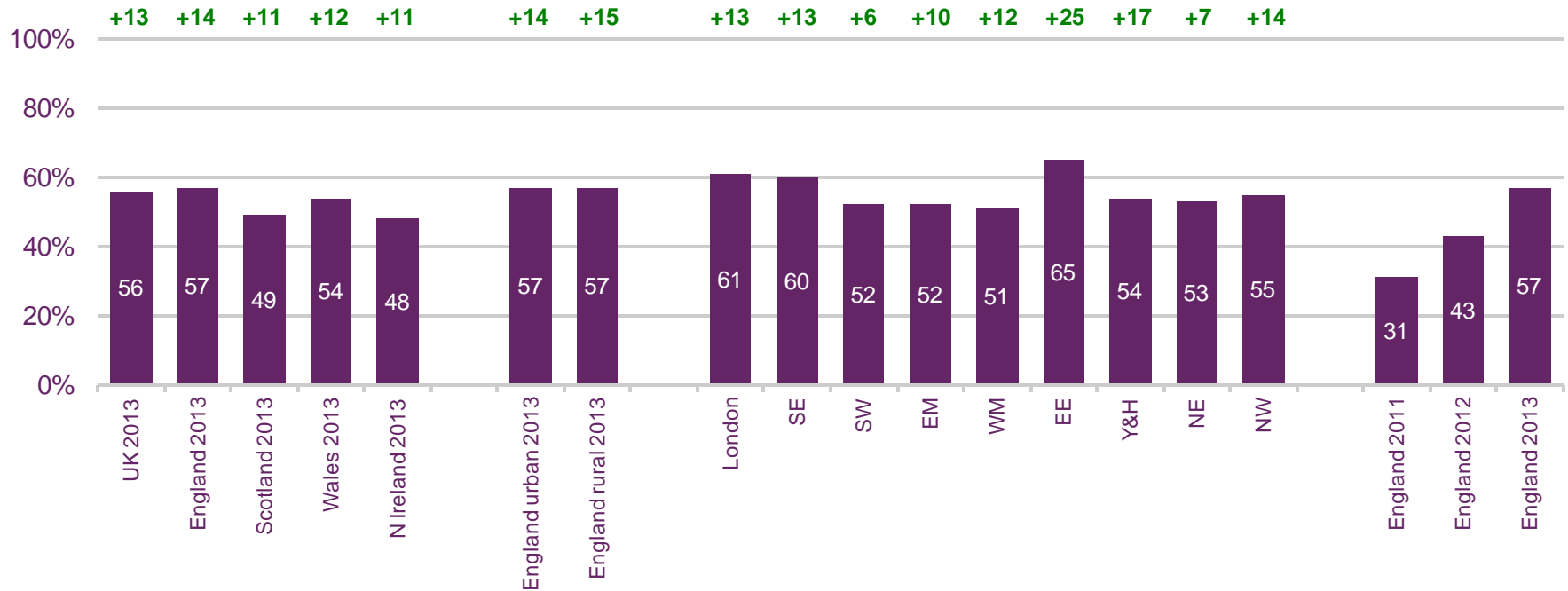
QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012, 2250 England 2013)

Take-up of smartphones

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



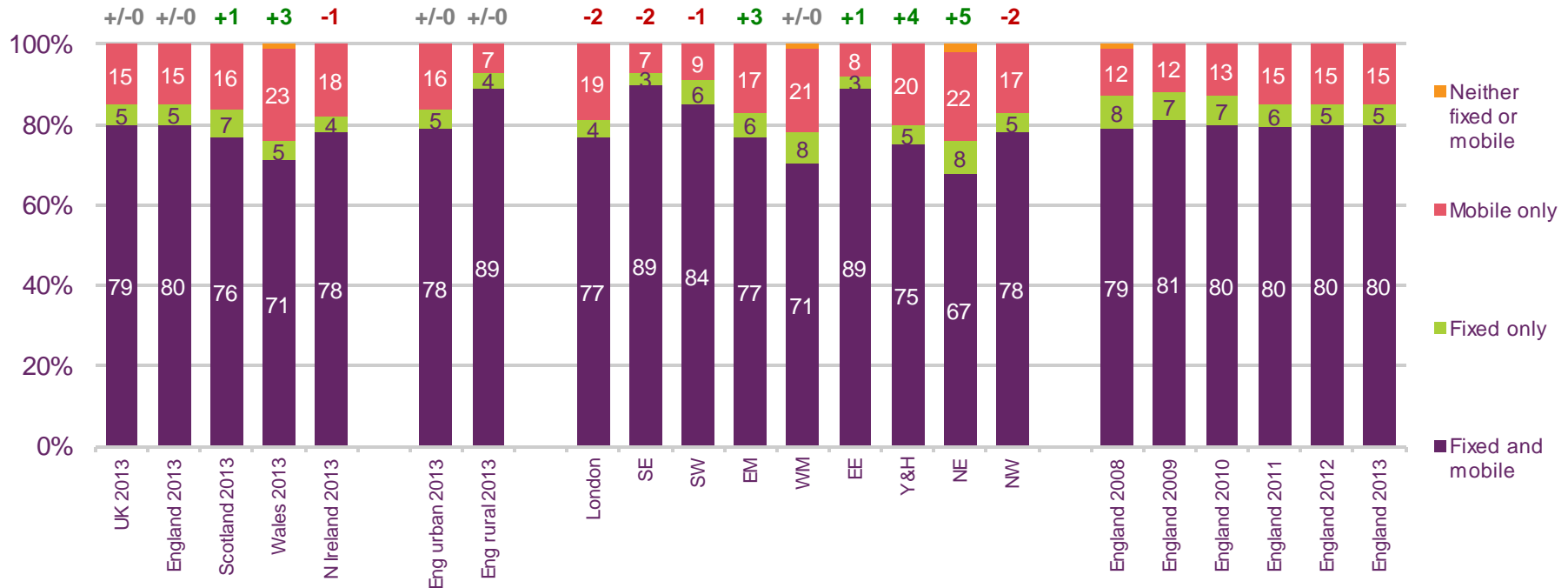
QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the HTC Desire.

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 2020 England, 464 Scotland, 440 Wales, 463 Northern Ireland, 1755 England urban, 265 England rural, 226 London, 229 South East, 219 South West, 224 East Midlands, 221 West Midlands, 241 East of England, 223 Yorkshire & Humber, 215 North East, 222 North West, 1786 England 2011, 2043 England 2012, 2020 England 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?

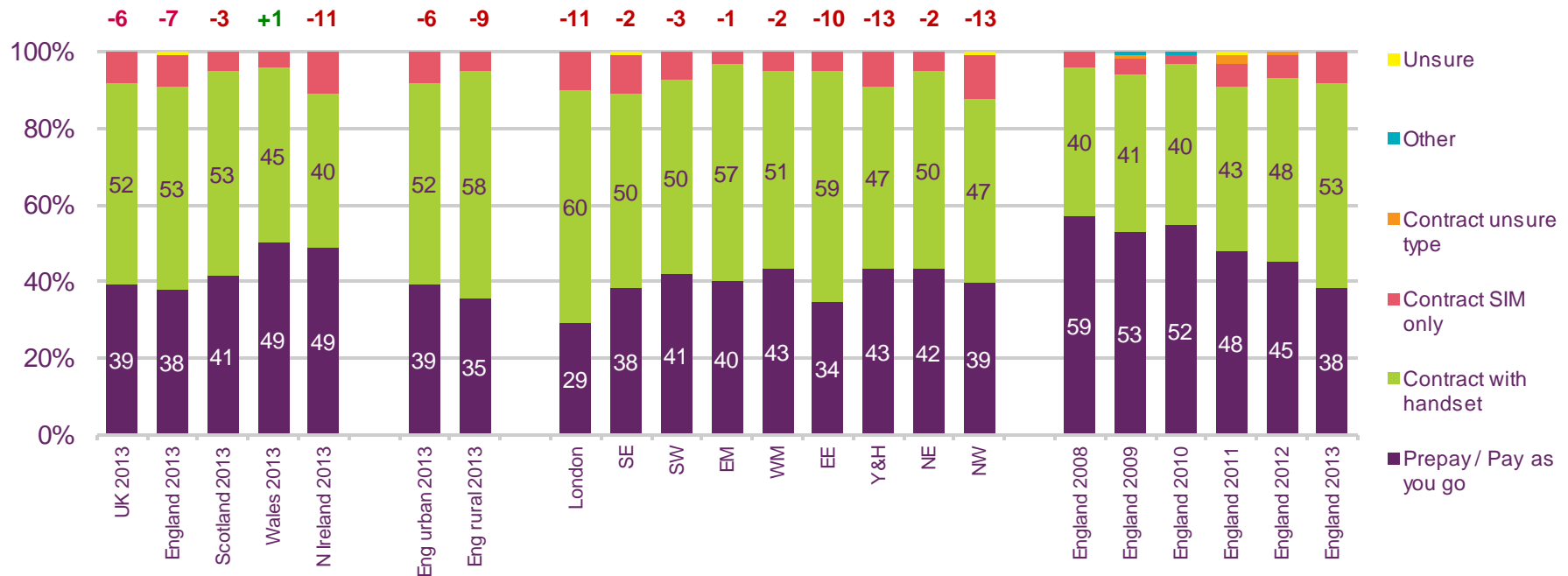
Source: Ofcom research, Quarter 1 2013

Base: All adults aged 16+ (n = 3750 UK, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 247 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East, 251 North West 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251

England 2012, 2250 England 2013)

Type of mobile subscription

Figure above bar shows % point change in prepay from Q1 2012

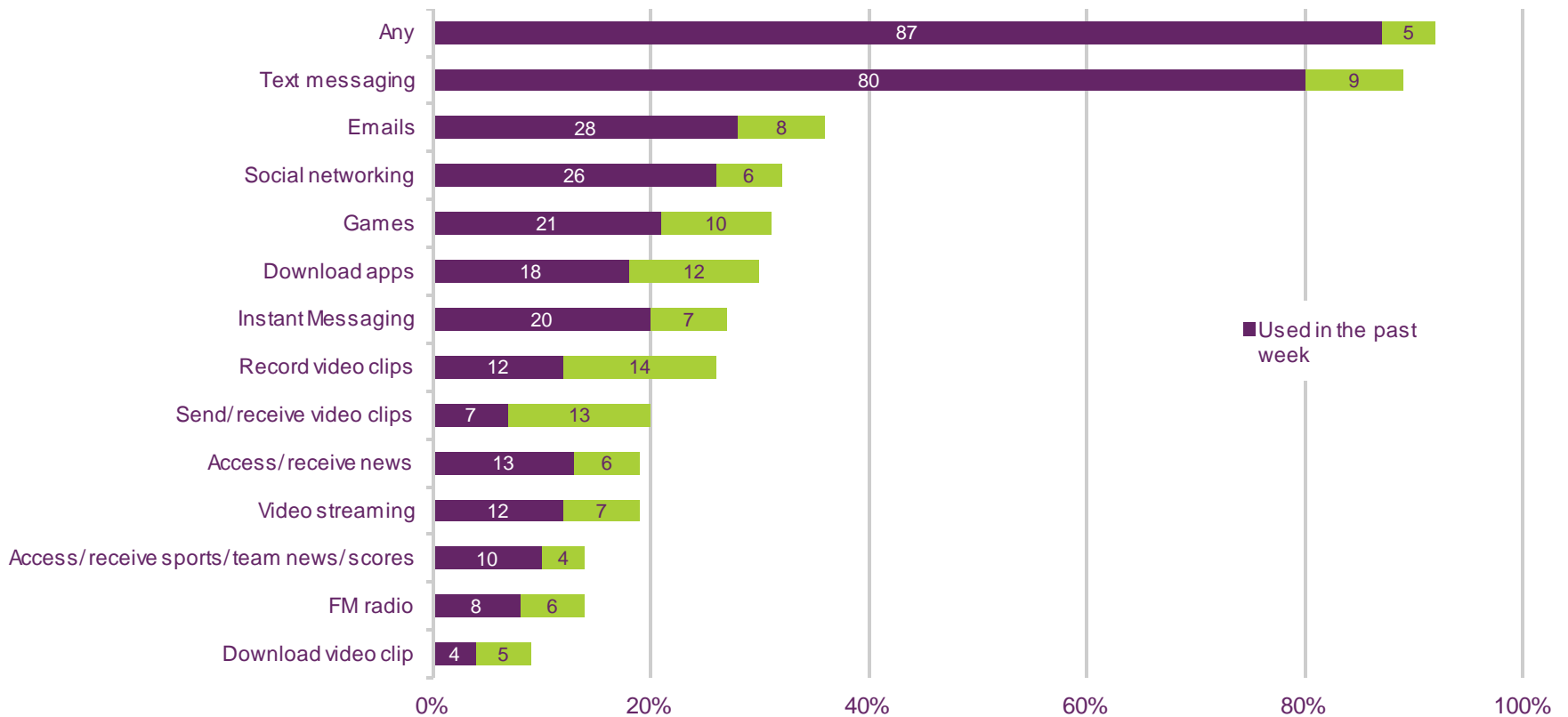


QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 2020 England, 464 Scotland, 440 Wales, 463 Northern Ireland, 1755 England urban, 265 England rural, 226 London, 229 South East, 219 South West, 224 East Midlands, 221 West Midlands, 241 East of England, 223 Yorkshire & Humber, 215 North East, 222 North West, 2860 England 2008, 2973 England 2009, 5008 England 2010, 1786 England 2011, 2043 England 2012, 2020 England 2013)

Use of mobile applications



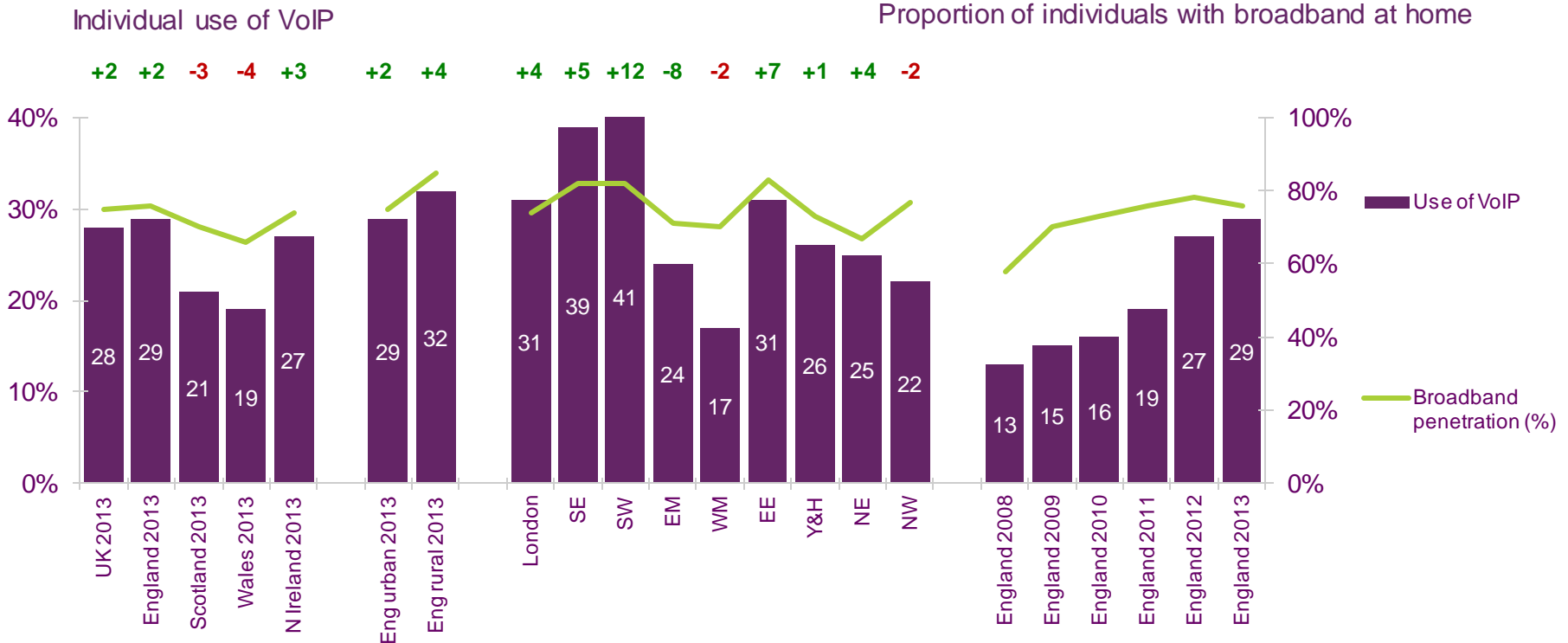
QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n= 2020 England 2013)

Individual use of Voice over IP

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

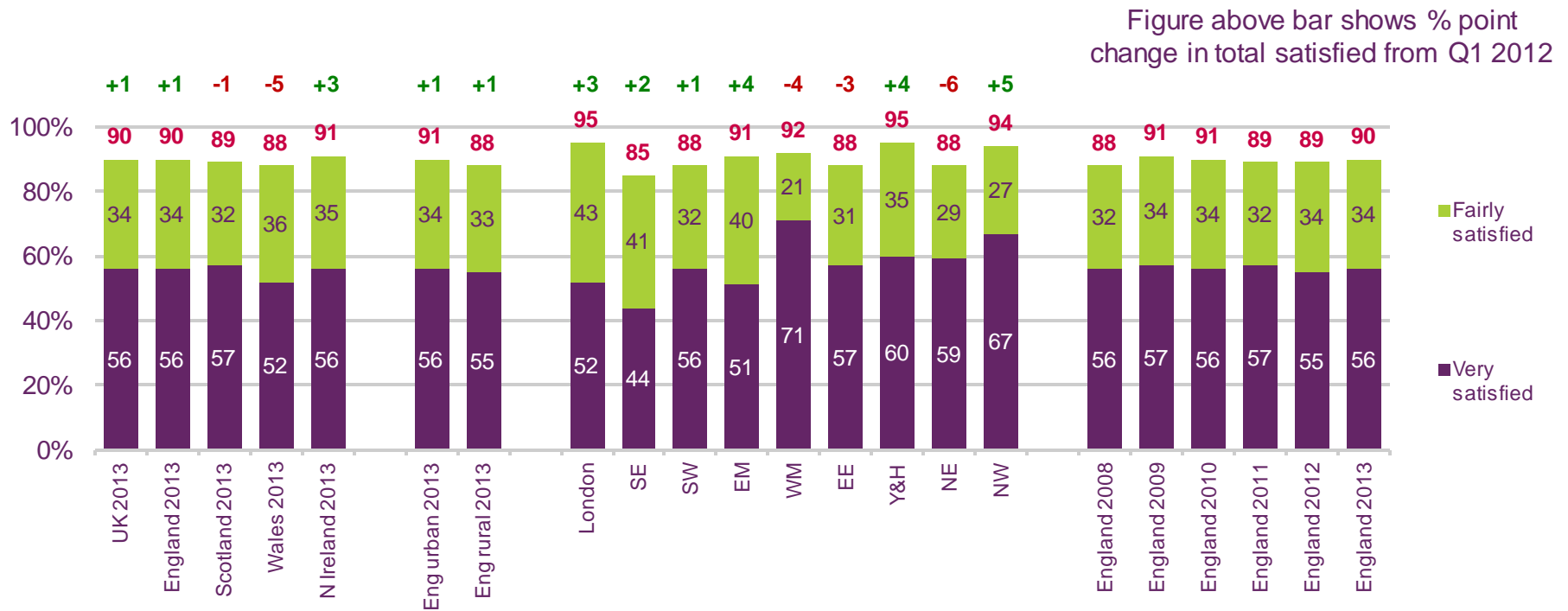


QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?/QE5. Which, if any, of these do you use the internet for? *NB 2013 measure combines responses from internet users (at QE5A) and all UK adults (at QE30), data not comparable with previous 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, 2250 England, 501 Scotland, 492 Wales, 507 Northern Ireland, 1962 England urban, 288 England rural, 249 London, 247 South East, 248 South West, 251 East Midlands, 251 West Midlands, 254 East of England, 250 Yorkshire & Humber, 251 North East)

Overall satisfaction with fixed line services

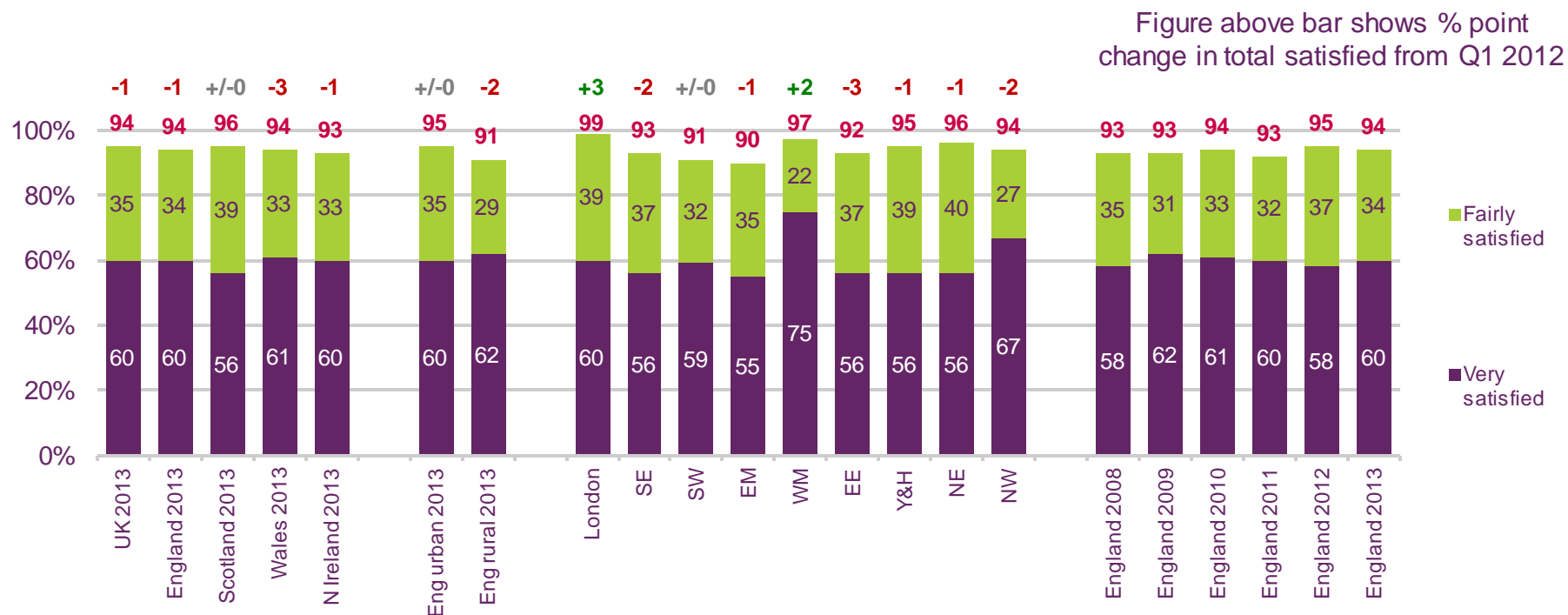


QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?
 Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a landline phone at home (n = 3135 UK, 1891 England, 425 Scotland, 395 Wales, 424 Northern Ireland, 1625 England urban, 266 England rural, 202 London, 228 South East, 225 South West, 209 East Midlands, 200 West Midlands, 231 East of England, 200 Yorkshire & Humber, 187 North East, 209 North West, 2968 England 2008, 2962 England 2009, 4851 England 2010, 1707 England 2011, 1923 England 2012, 1891 England 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



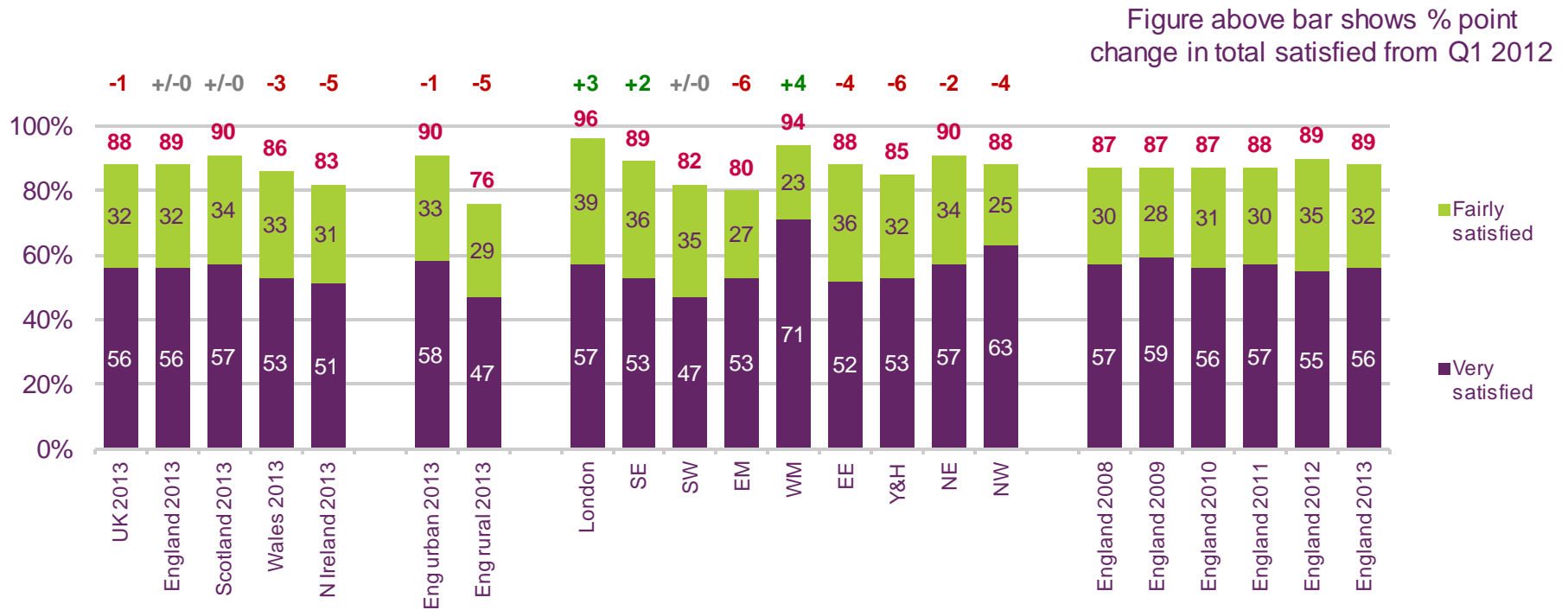
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 2020 England, 464 Scotland, 440 Wales, 463 Northern Ireland, 1755 England urban, 265 England rural, 226 London, 229 South East, 219 South West, 224 East Midlands, 221 West Midlands, 241 East of England, 223 Yorkshire & Humber, 215 North East, 222 North West, 2860 England 2008, 2973 England 2009, 5008 England 2010, 1786 England 2011, 2043 England 2012, 2020 England 2013)

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

Satisfaction with reception of mobile service



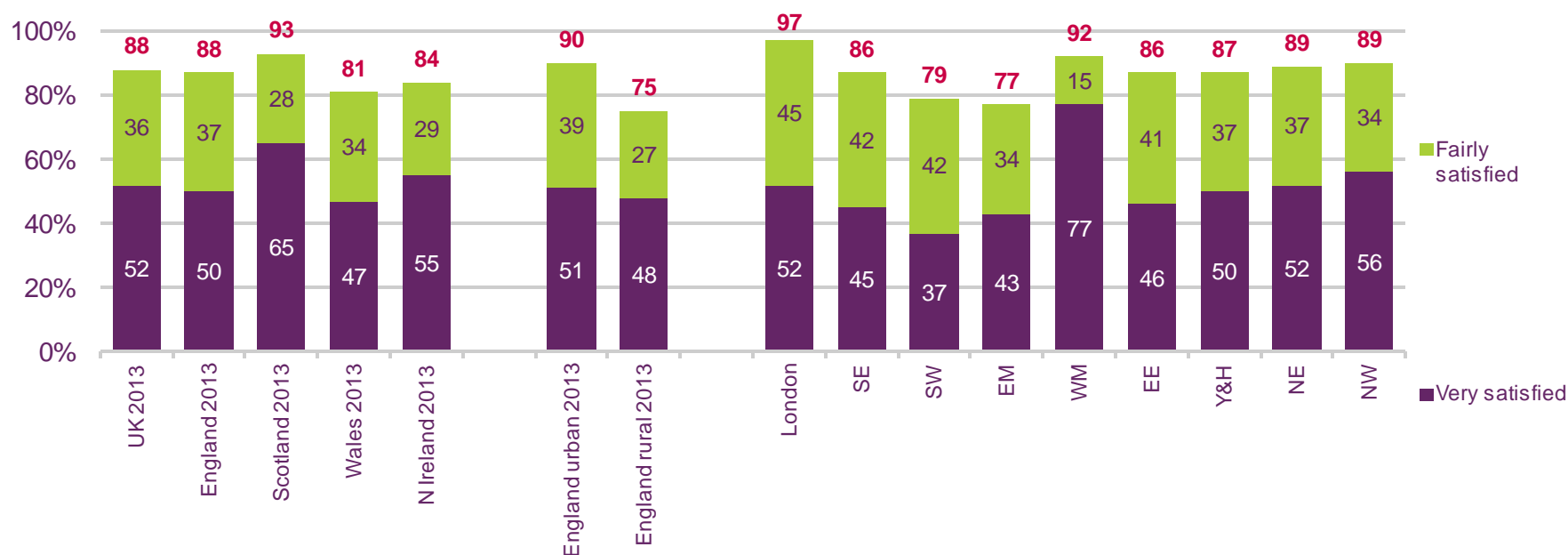
QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 2020 England, 464 Scotland, 440 Wales, 463 Northern Ireland, 1755 England urban, 265 England rural, 226 London, 229 South East, 219 South West, 224 East Midlands, 221 West Midlands, 241 East of England, 223 Yorkshire & Humber, 215 North East, 222 North West, 2860 England 2008, 2973 England 2009, 5008 England 2010, 1786 England 2011, 2043 England 2012, 2020 England 2013)

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

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)?

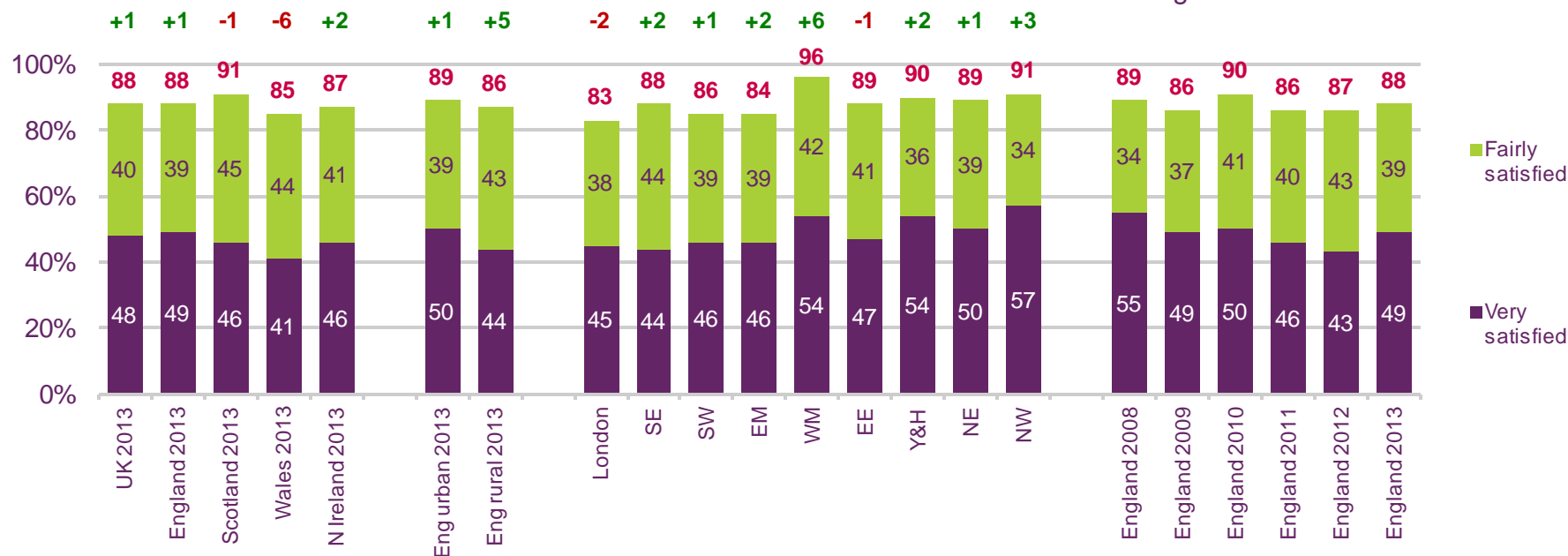
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ who personally use a smartphone (n = 1683 UK, 1052 England, 220 Scotland, 212 Wales, 199 Northern Ireland, 909 England urban, 143 England rural, 131 London, 128 South East, 103 South West, 107 East Midlands, 106 West Midlands, 147 East of England, 114 Yorkshire & Humber, 103 North East, 113 North West)

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



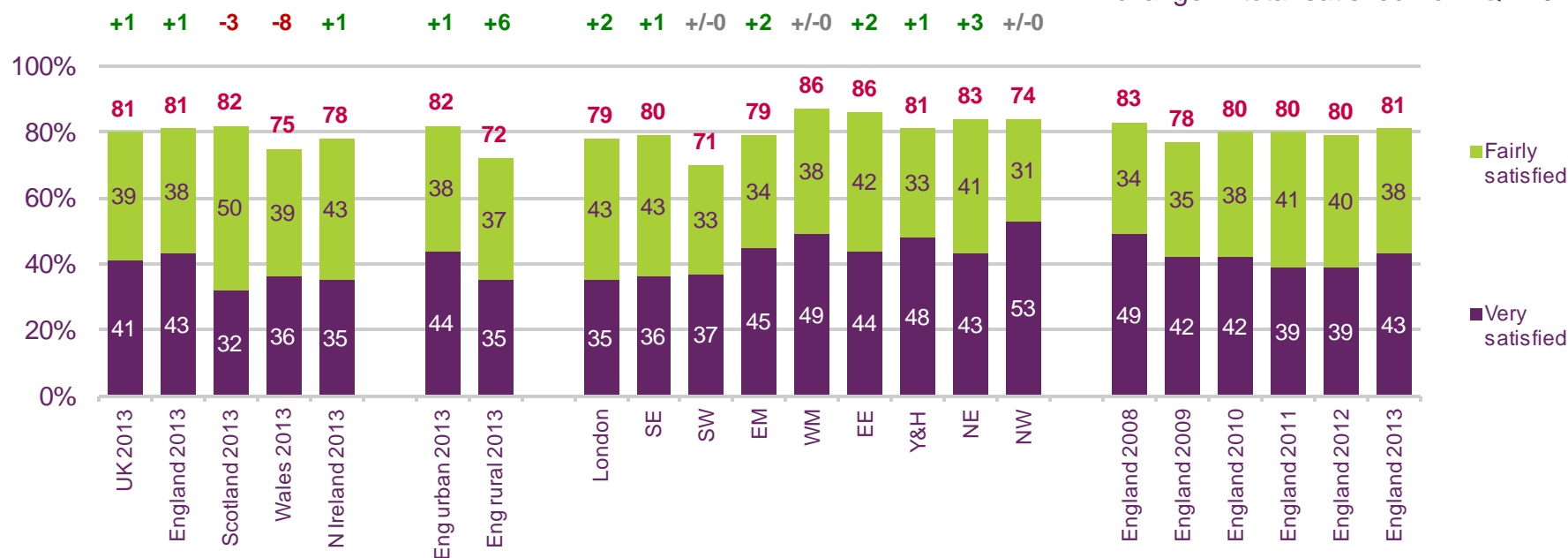
QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?
 Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2548 UK, 1562 England, 341 Scotland, 294 Wales, 351 Northern Ireland, 1331 England urban, 231 England rural, 172 London, 190 South East, 194 South West, 155 East Midlands, 159 West Midlands, 203 East of England, 165 Yorkshire & Humber, 149 North East, 175 North West, 1907 England 2008, 2048 England 2009, 3559 England 2010, 1311 England 2011, 1577 England 2012, 1562 England 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

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



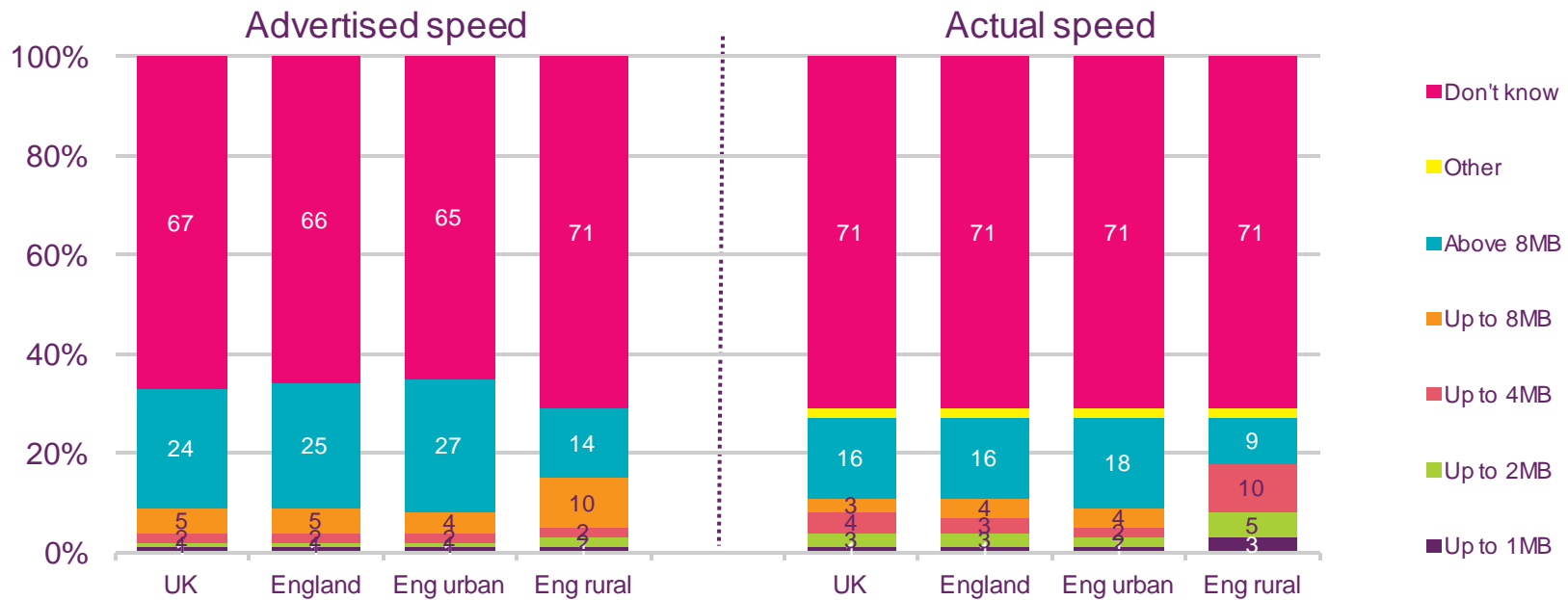
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2548 UK, 1562 England, 341 Scotland, 294 Wales, 351 Northern Ireland, 1331 England urban, 231 England rural, 172 London, 190 South East, 194 South West, 155 East Midlands, 159 West Midlands, 203 East of England, 165 Yorkshire & Humber, 149 North East, 175 North West, 1907 England 2008, 2048 England 2009, 3559 England 2010, 1311 England 2011, 1577 England 2012, 1562 England 2013)

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 England



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?

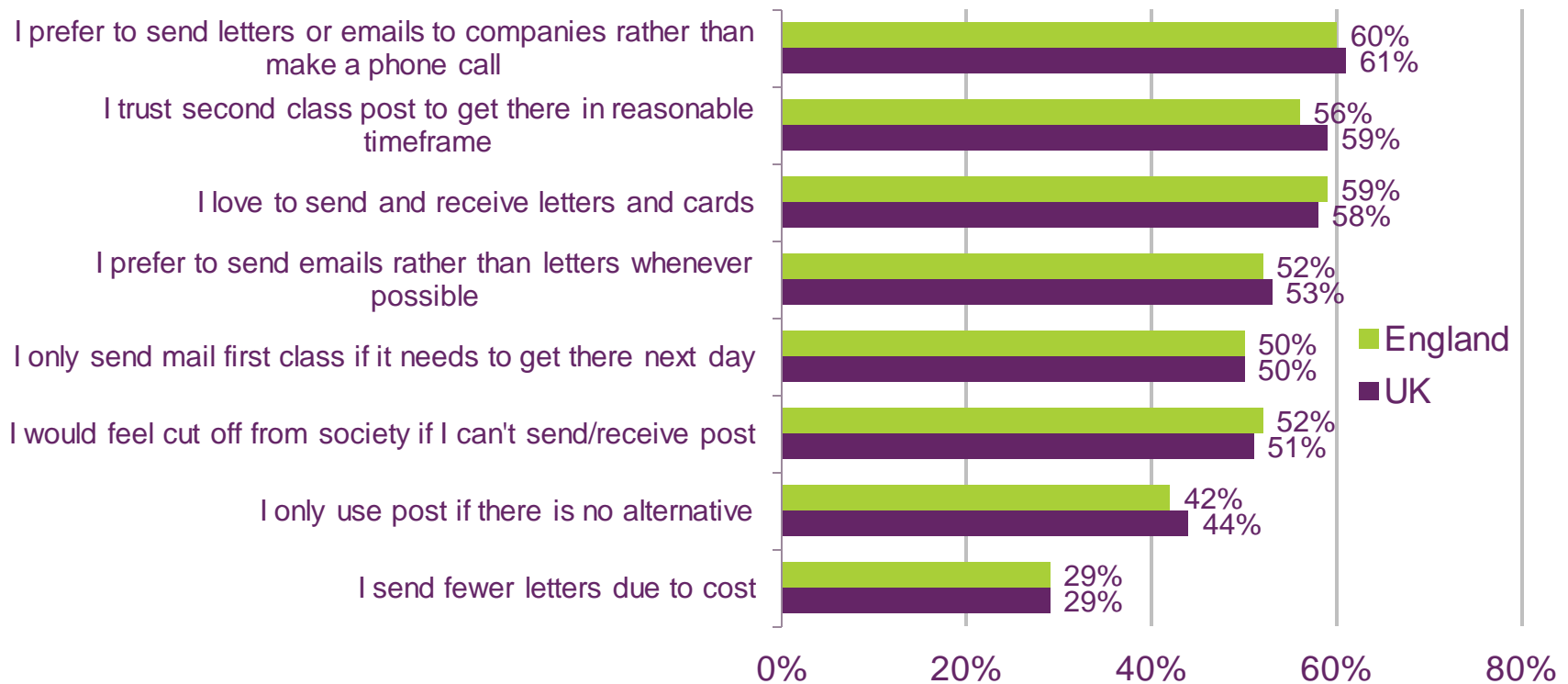
Source: Ofcom research, Quarter 1 2013

Base: Adults aged 16+ with broadband connection at home (n = 2548 UK, 1562 England, 1331 England urban, 231 England rural)

Post

Attitudes to sending / receiving post

Proportion of respondents agreeing with each statement(%)

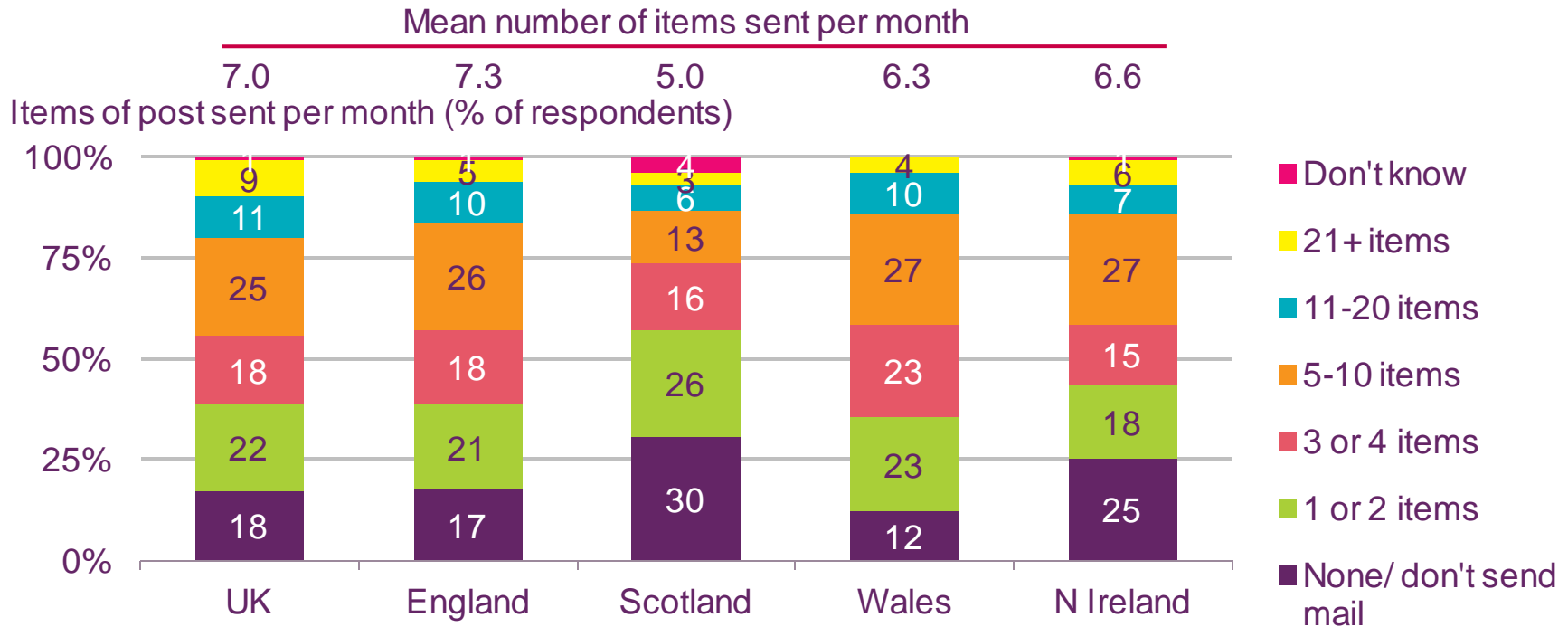


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All respondents (n = 4844 UK, 2789 England)

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

Approximate number of items of post sent in the past month



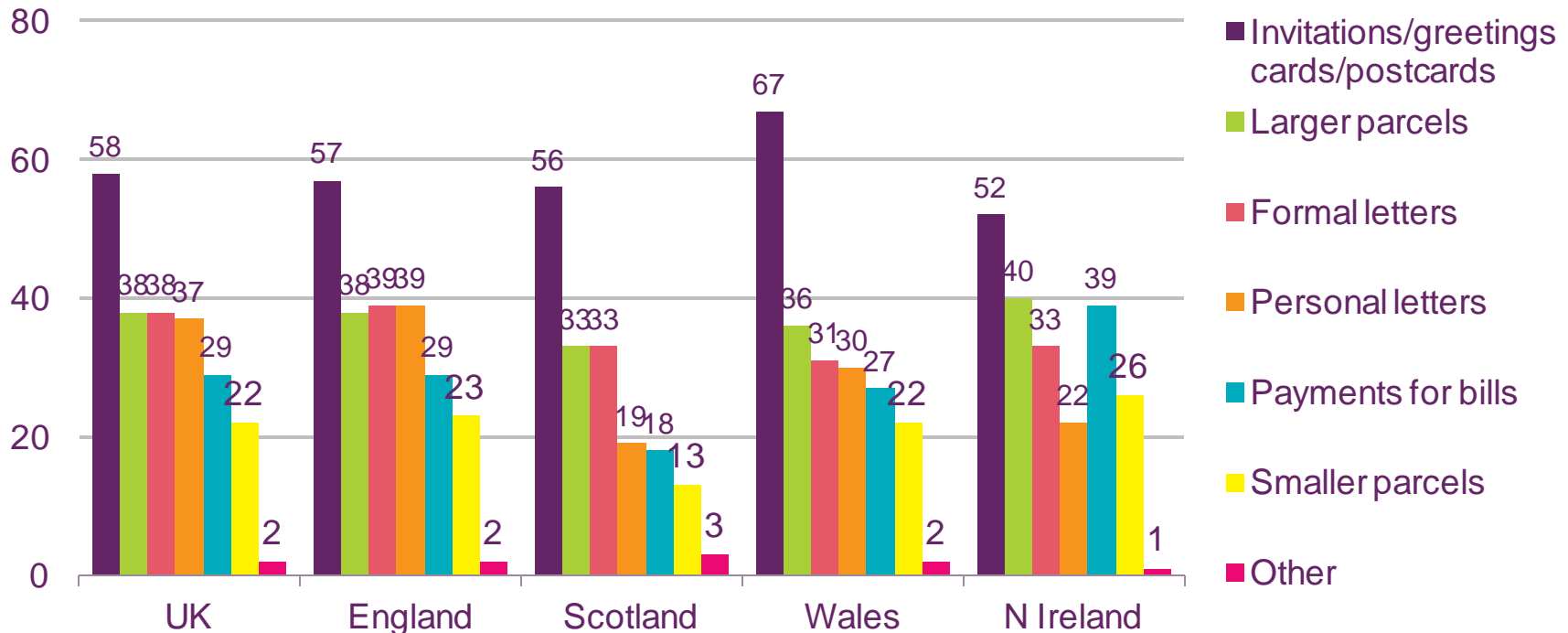
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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 (%)



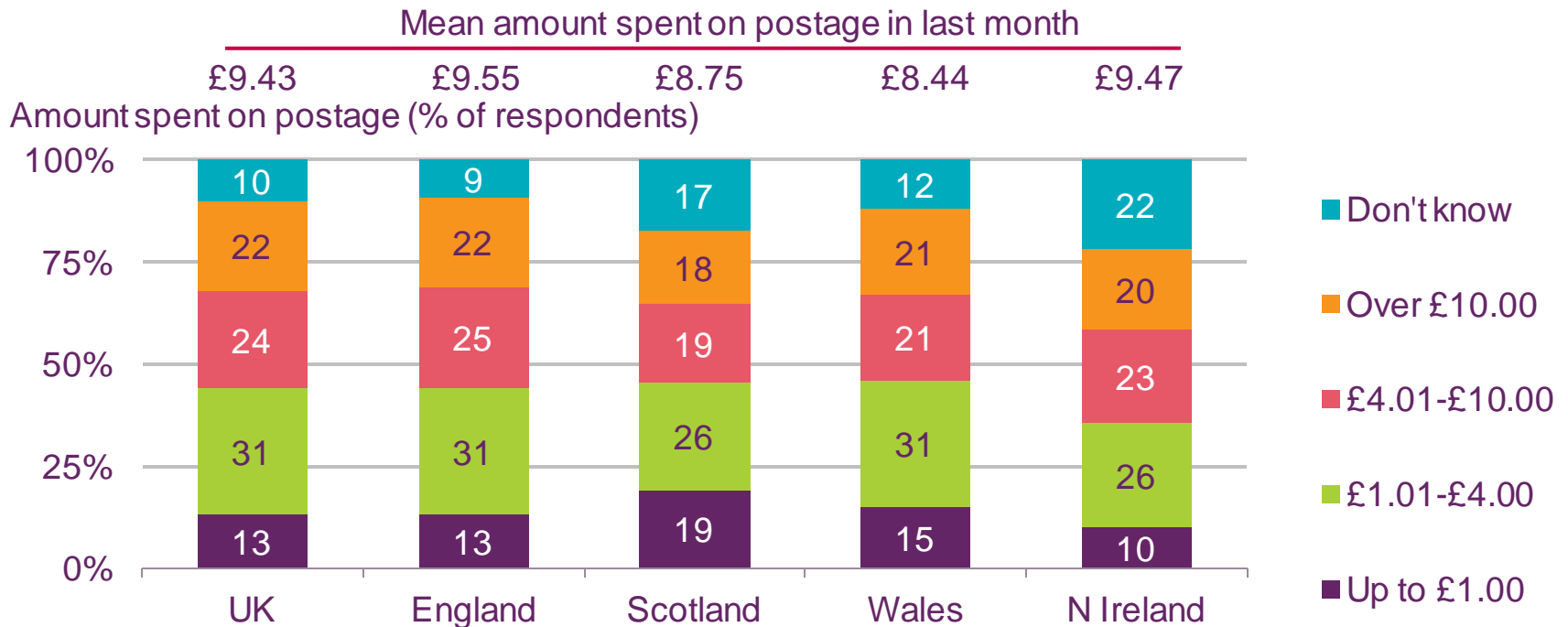
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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



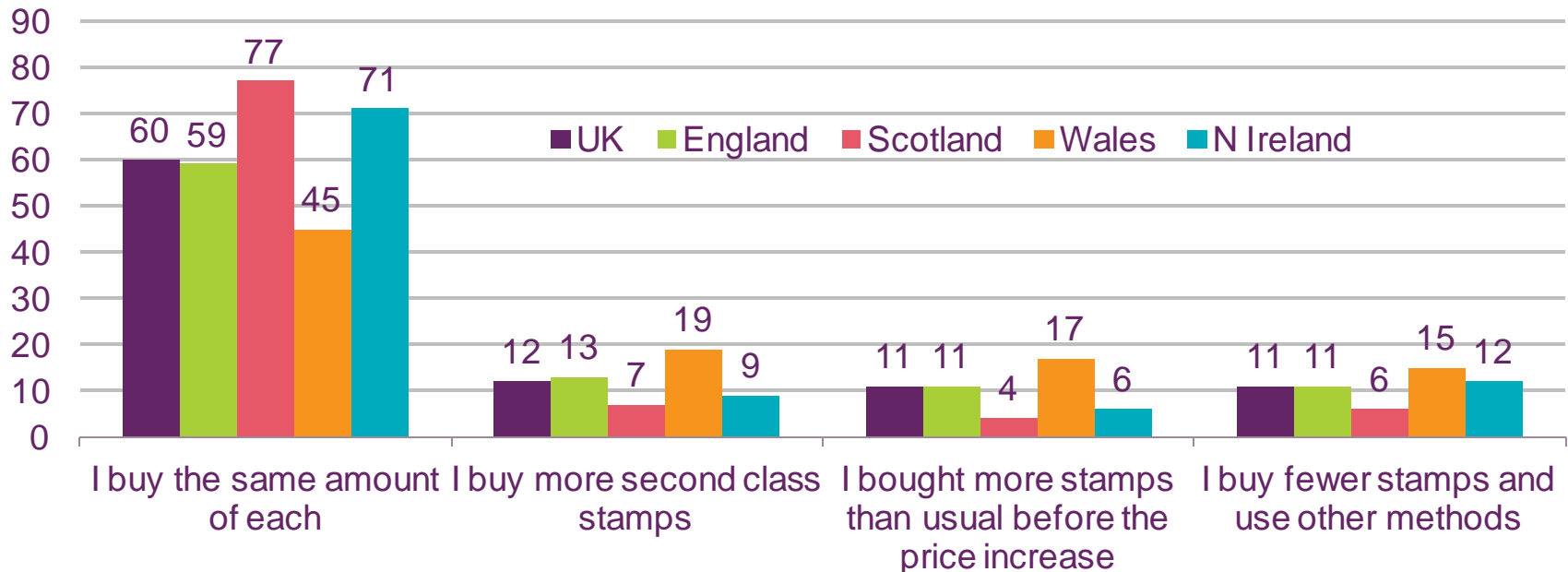
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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 (%)



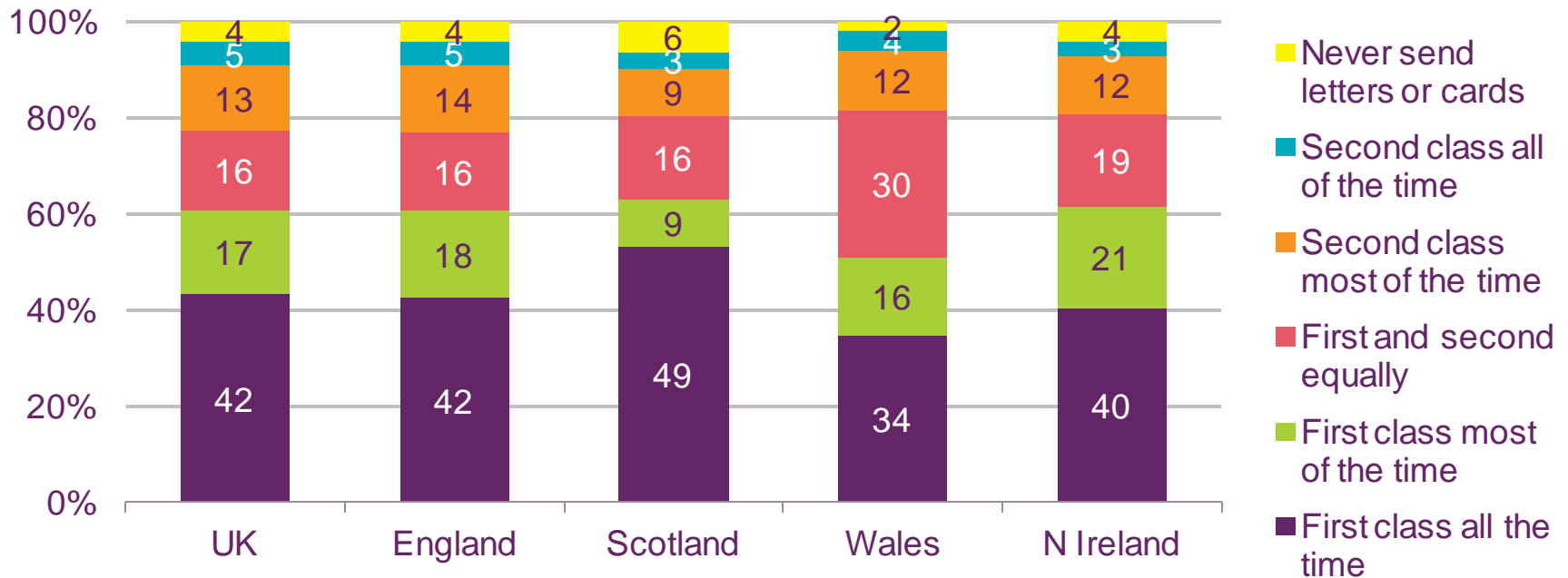
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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 (%)

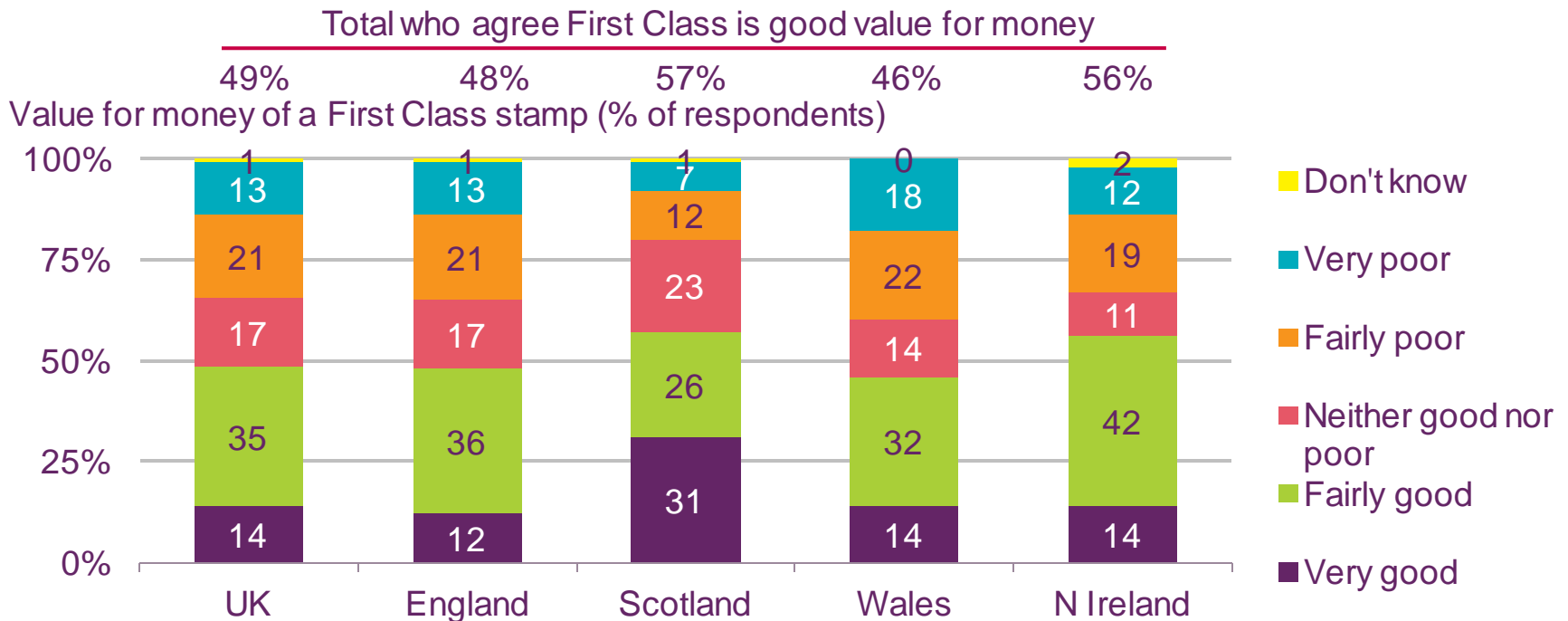


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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?

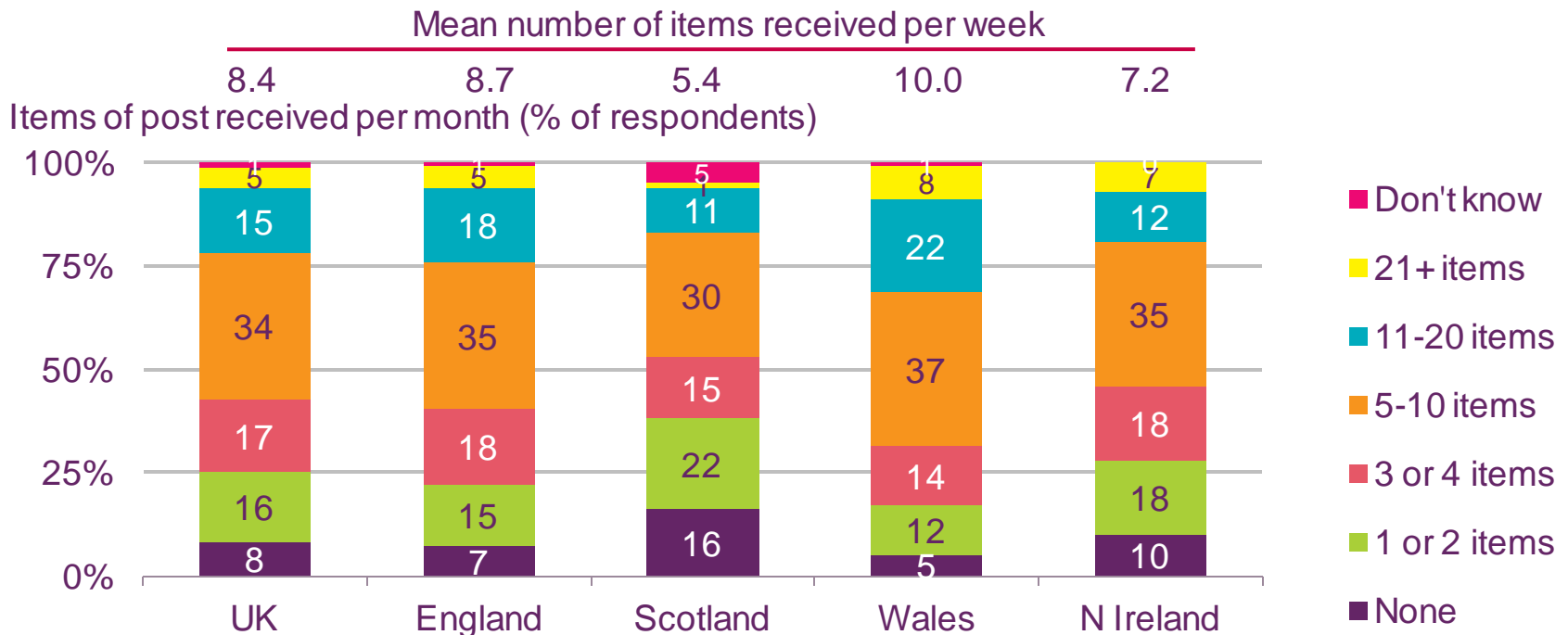
Value for money of sending post using a First Class stamp



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



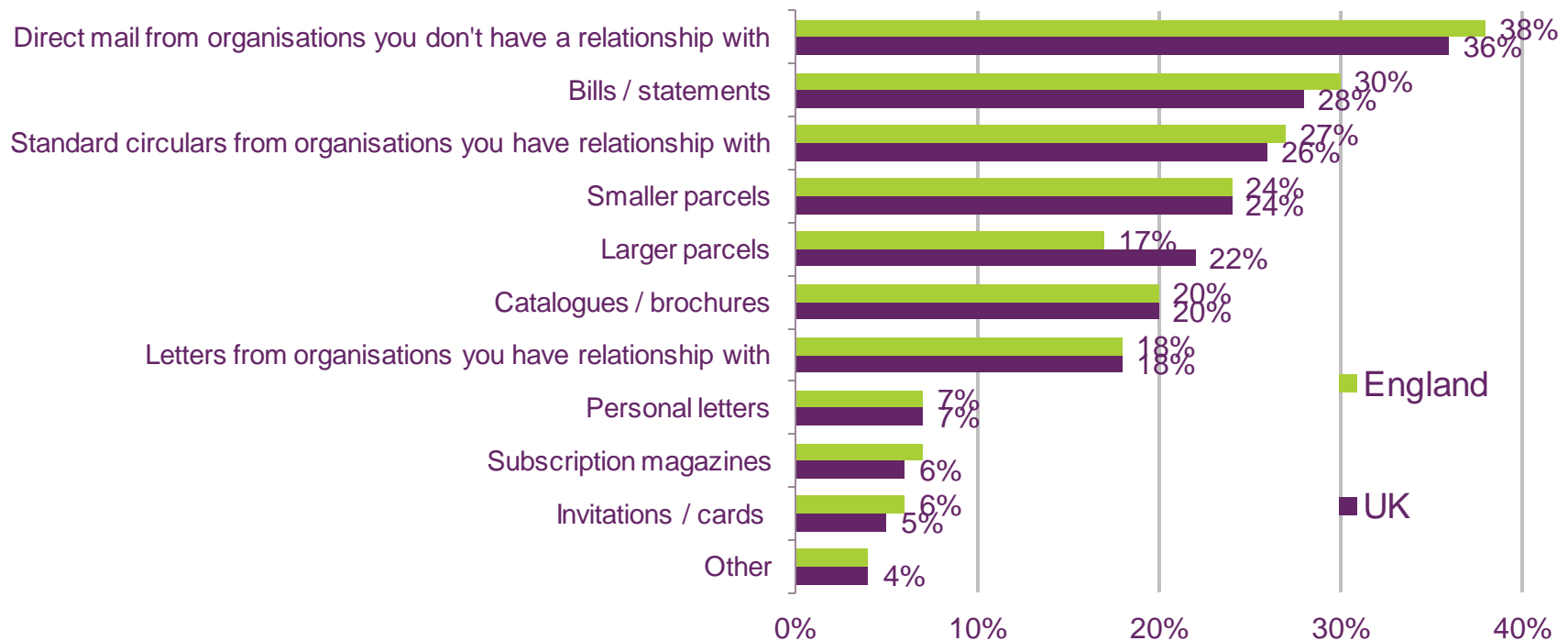
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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 (%)

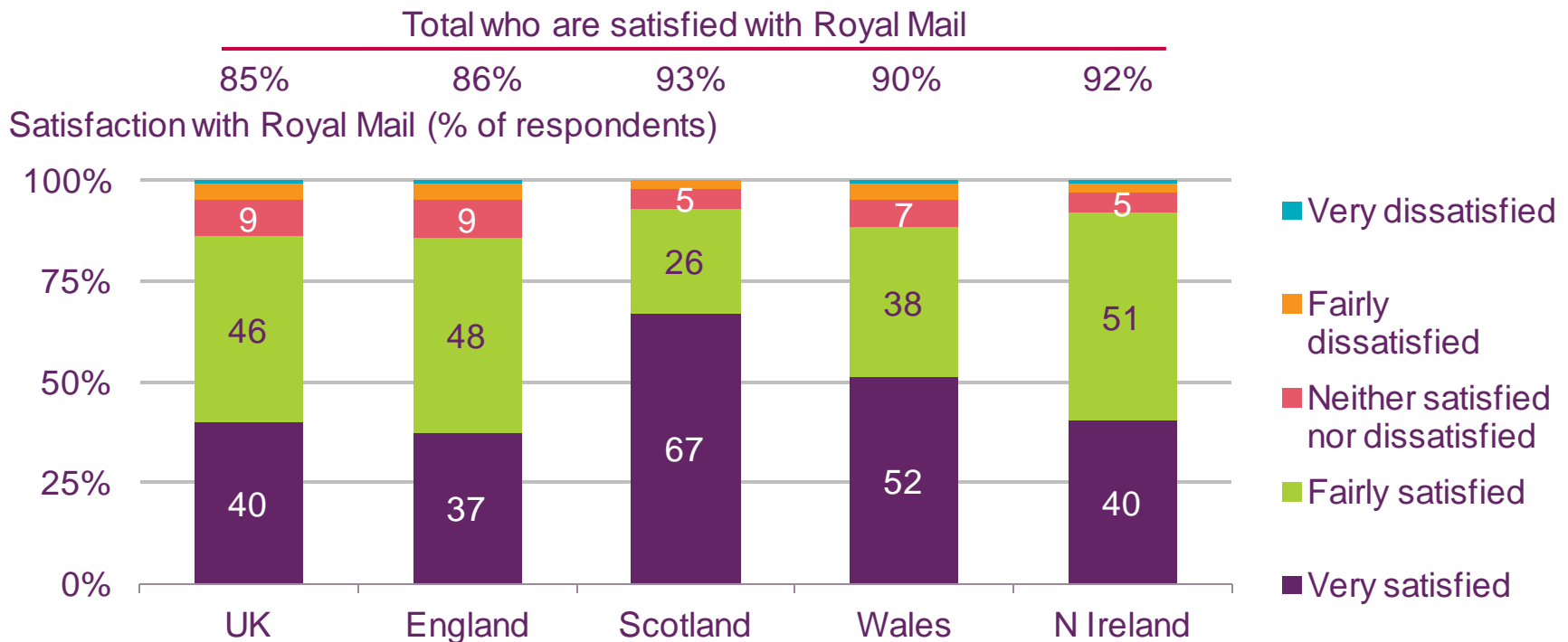


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

Base: All who say the number of items received by post has increased compared to two years ago (n = 1181 UK, 673 England)

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

Overall satisfaction with Royal Mail



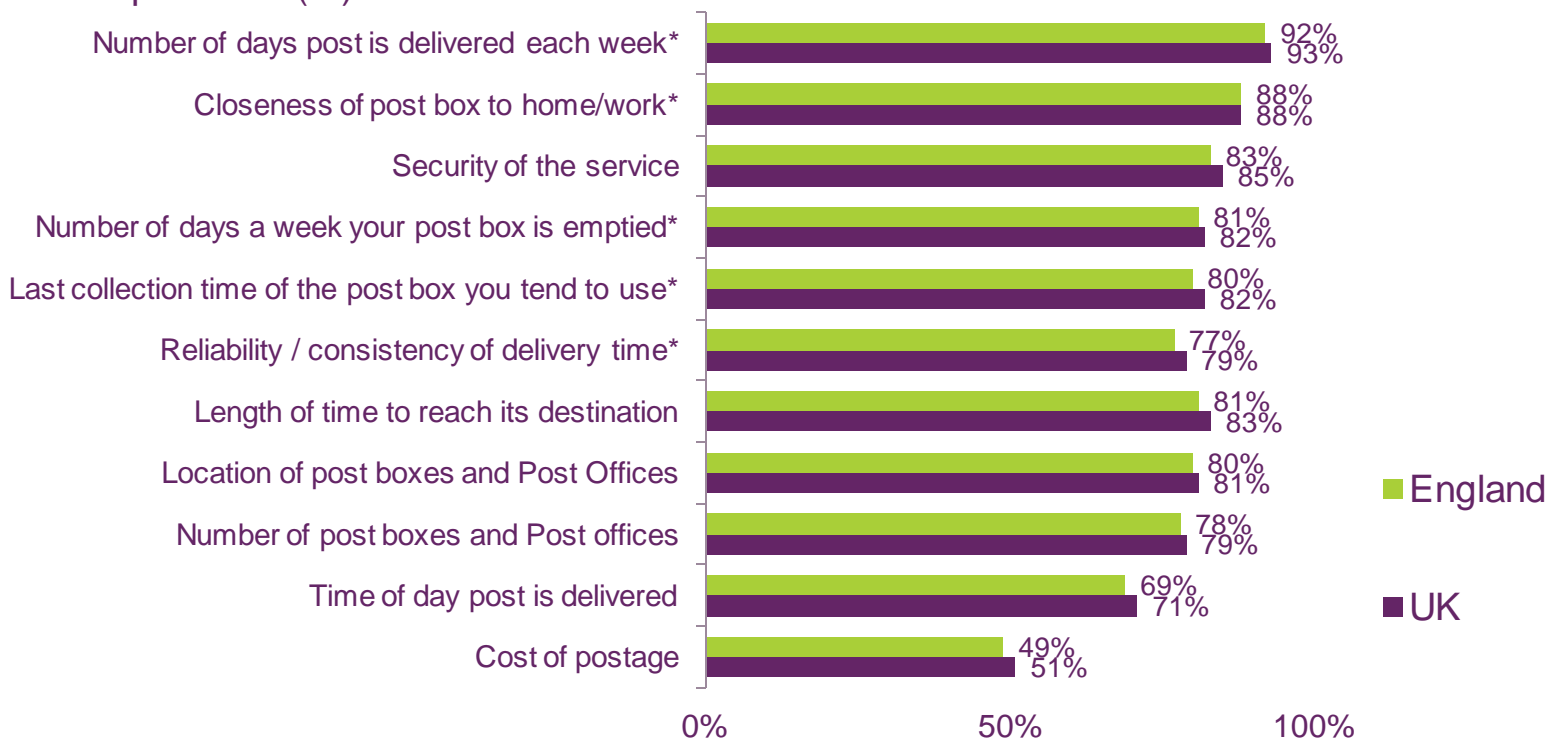
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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

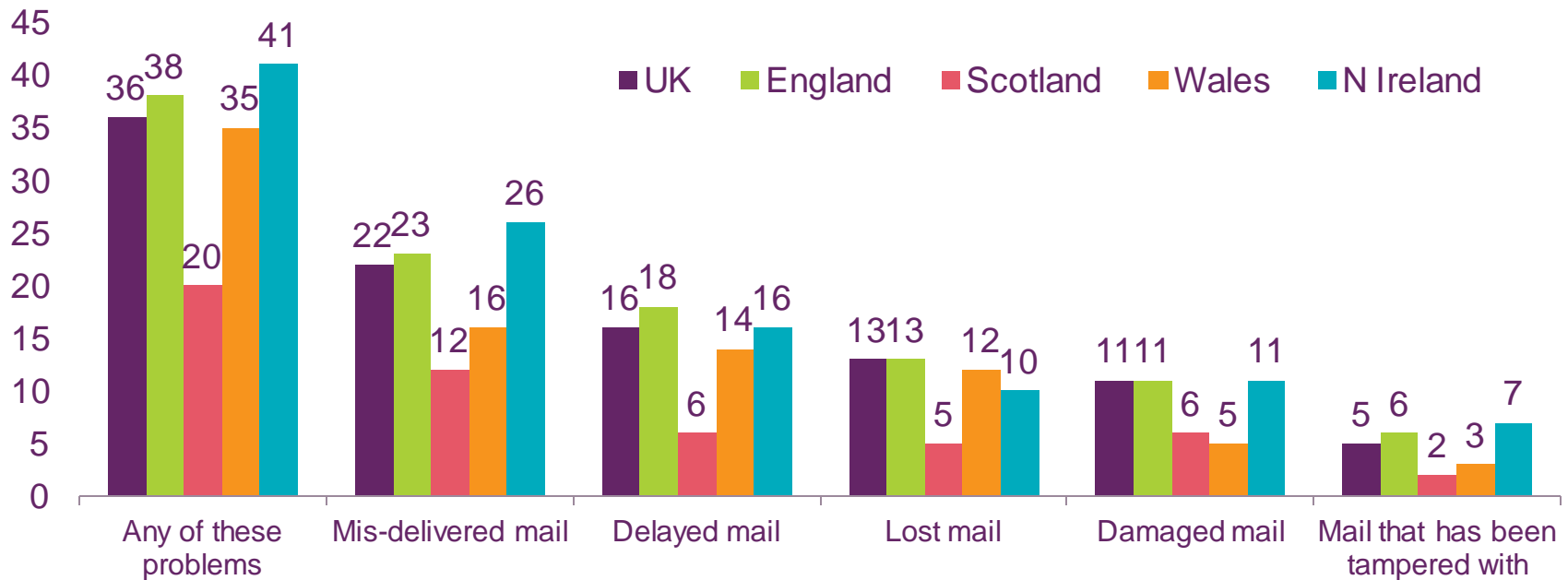
Base: All respondents (n = 4844 UK, 2789 England)

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

*Base: All respondents (from Q1 2013) (n = 2397 UK, 1380 England)

Problems experienced with Royal Mail in past 12 months

Proportion of consumers (%)

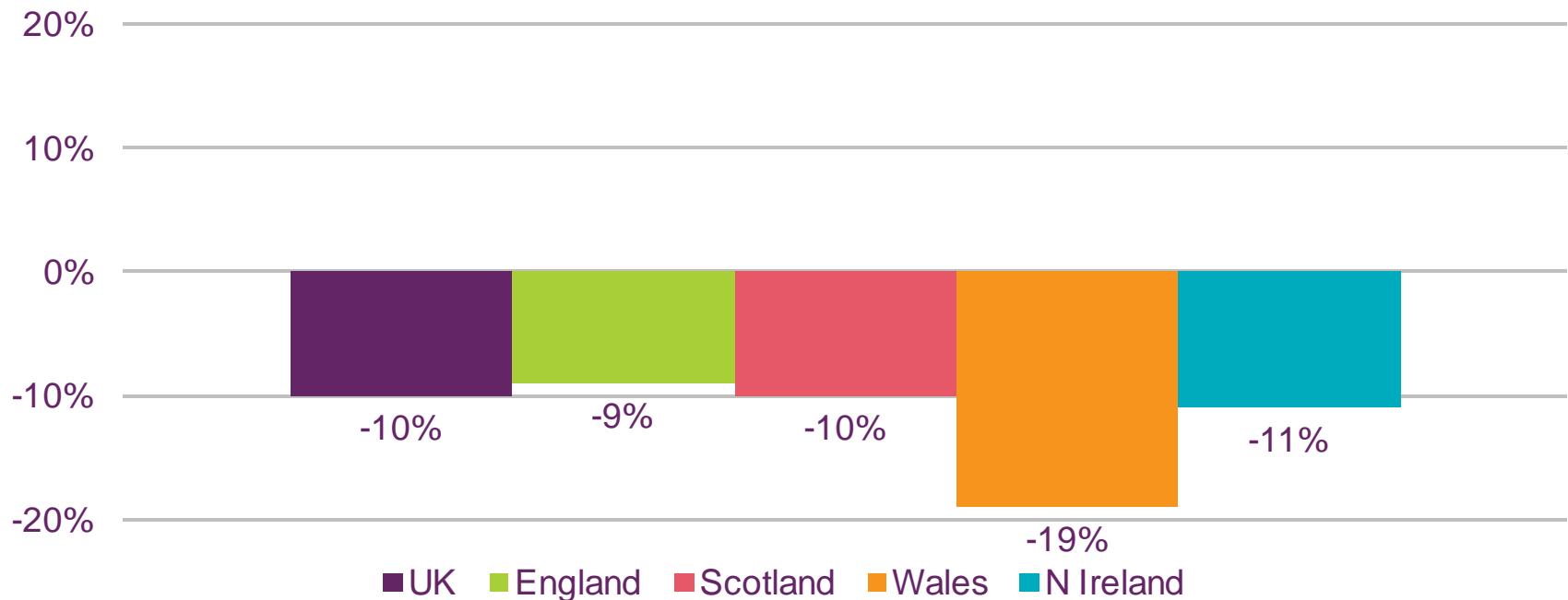


Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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



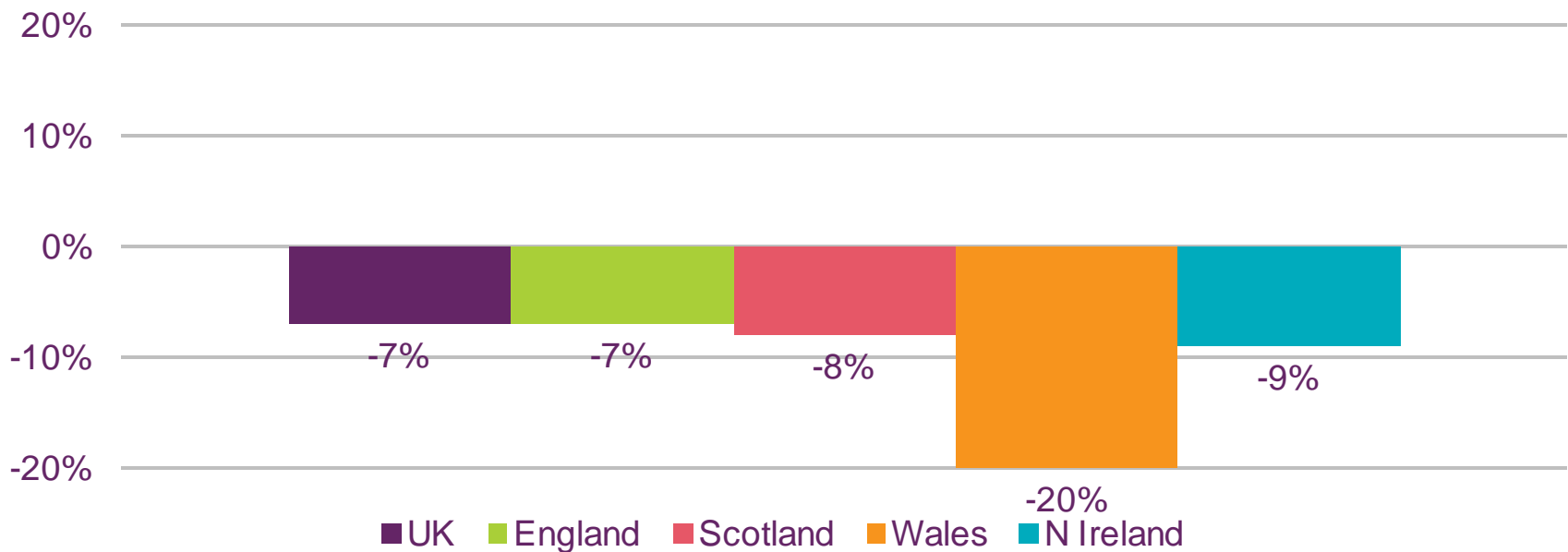
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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



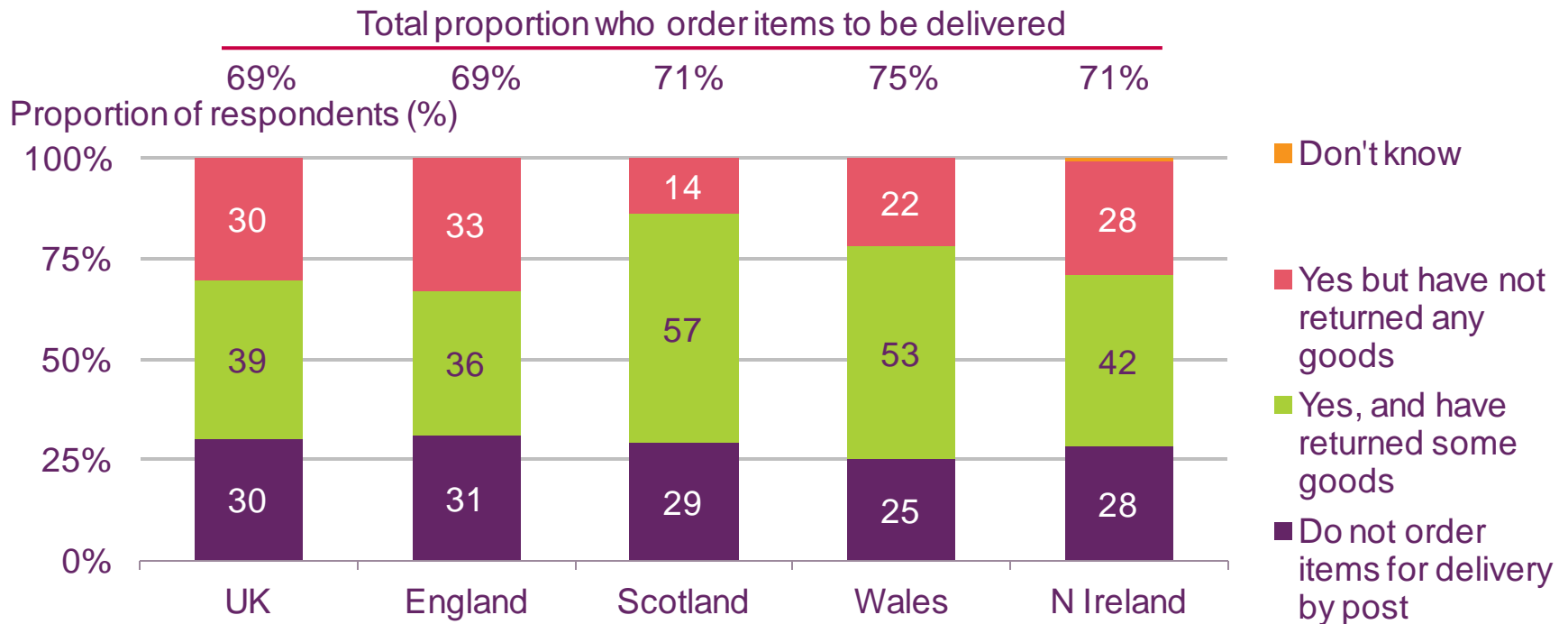
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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



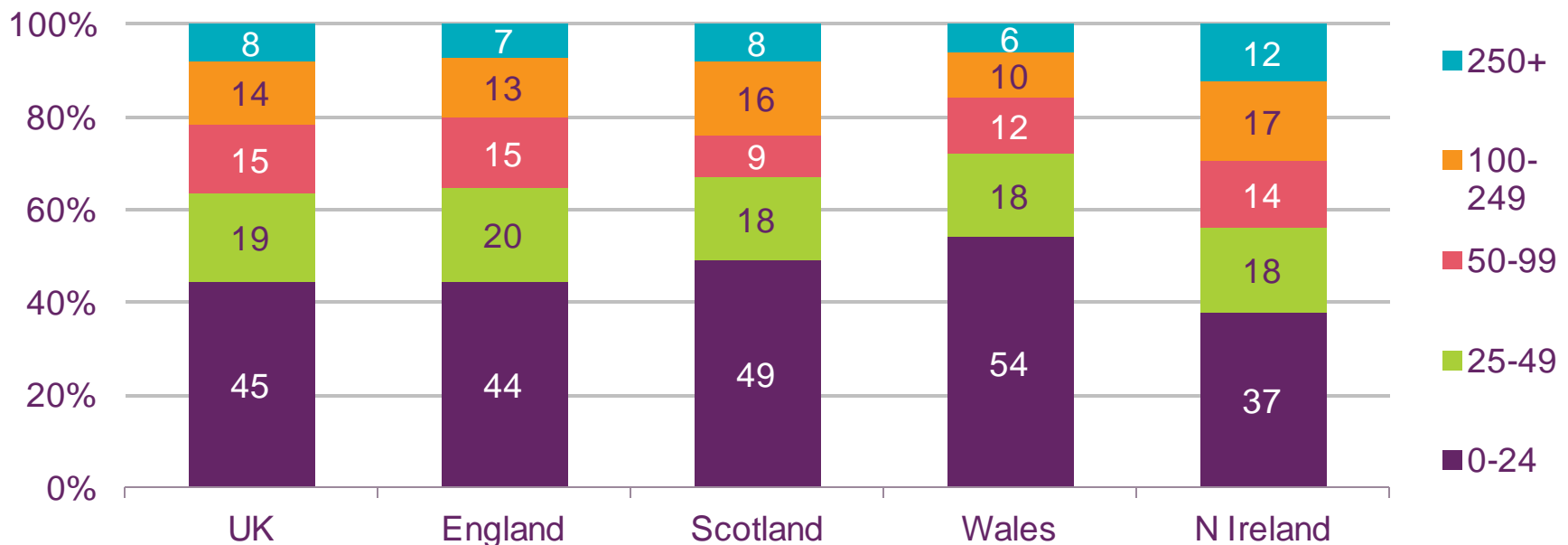
Source: Ofcom Residential Postal Tracker, Q3 2012-Q2 2013

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 (%)



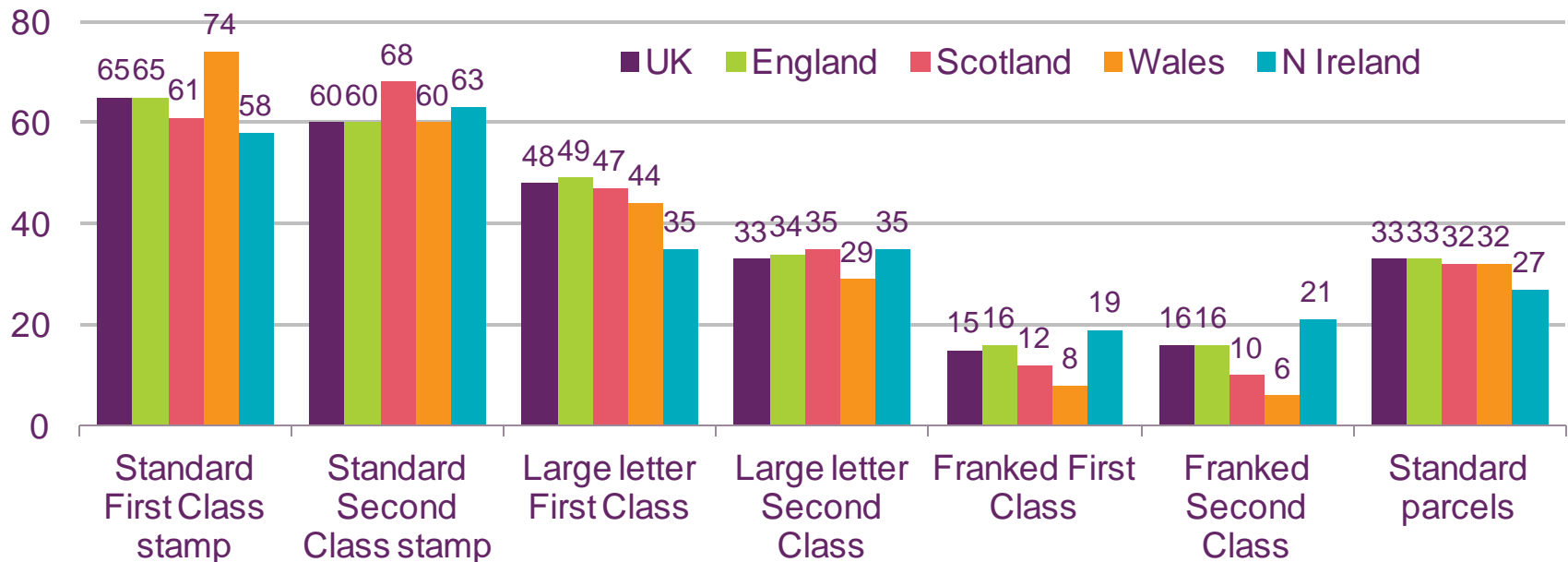
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

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 (%)



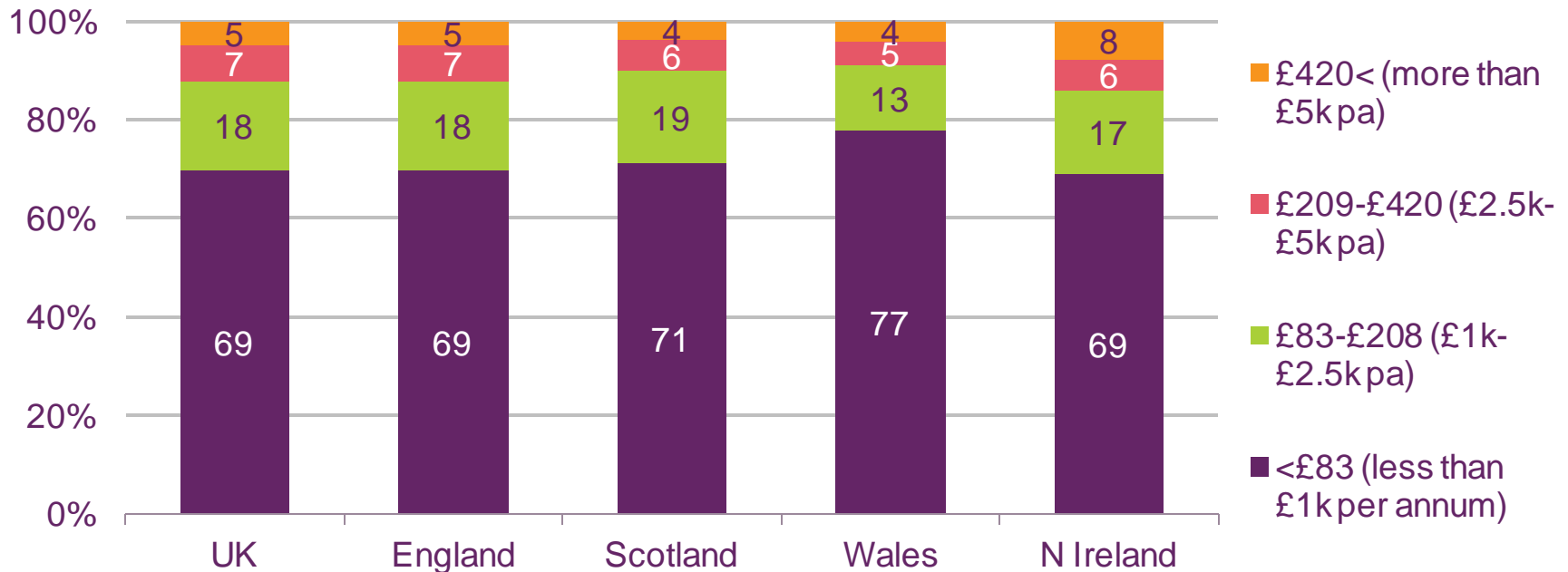
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

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

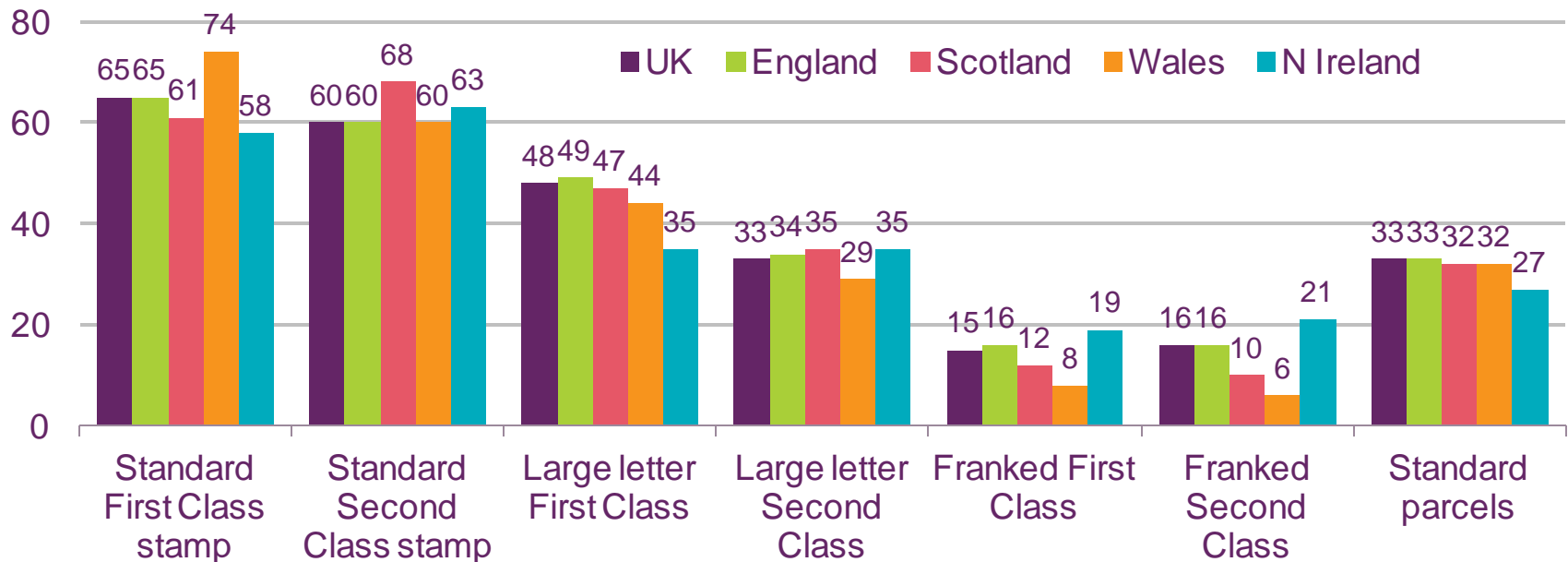
Base : All respondents (n = 1604 UK, 1023 England, 214 Scotland, 193 Wales, 174 N Ireland)

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 (%)

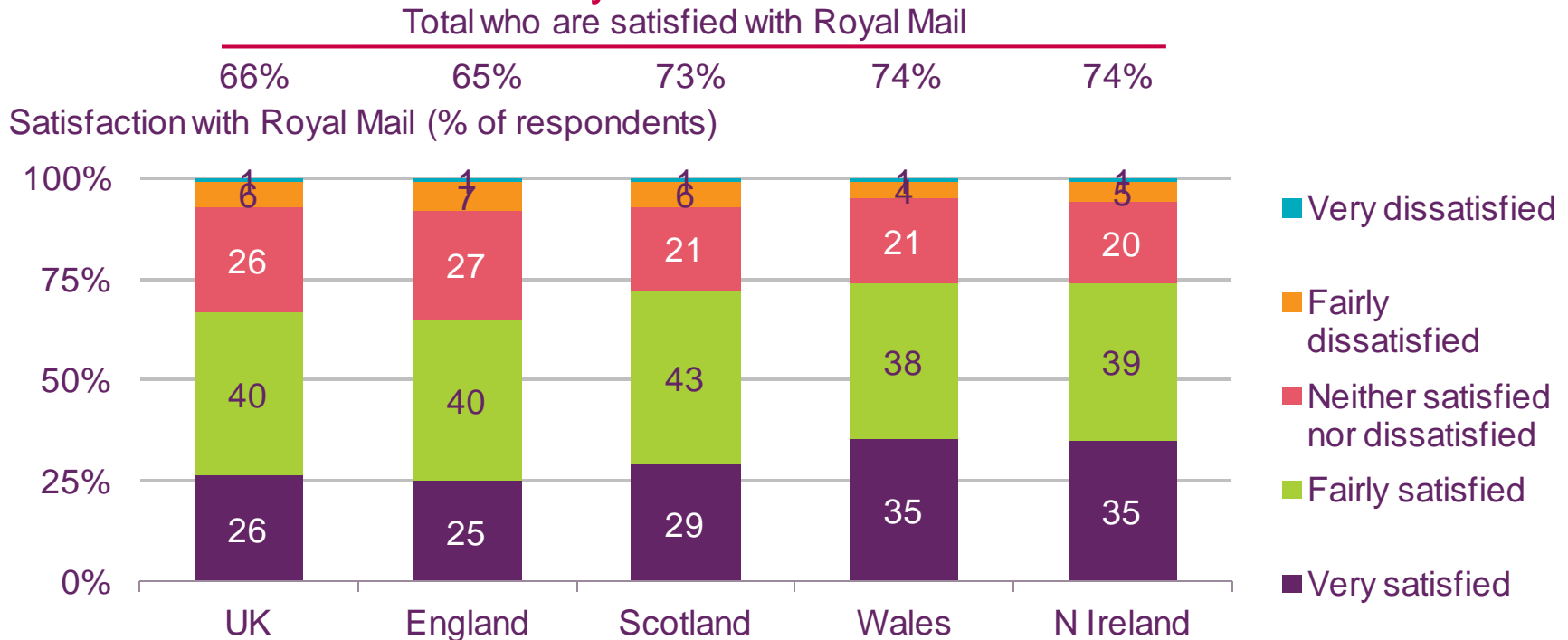


Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

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

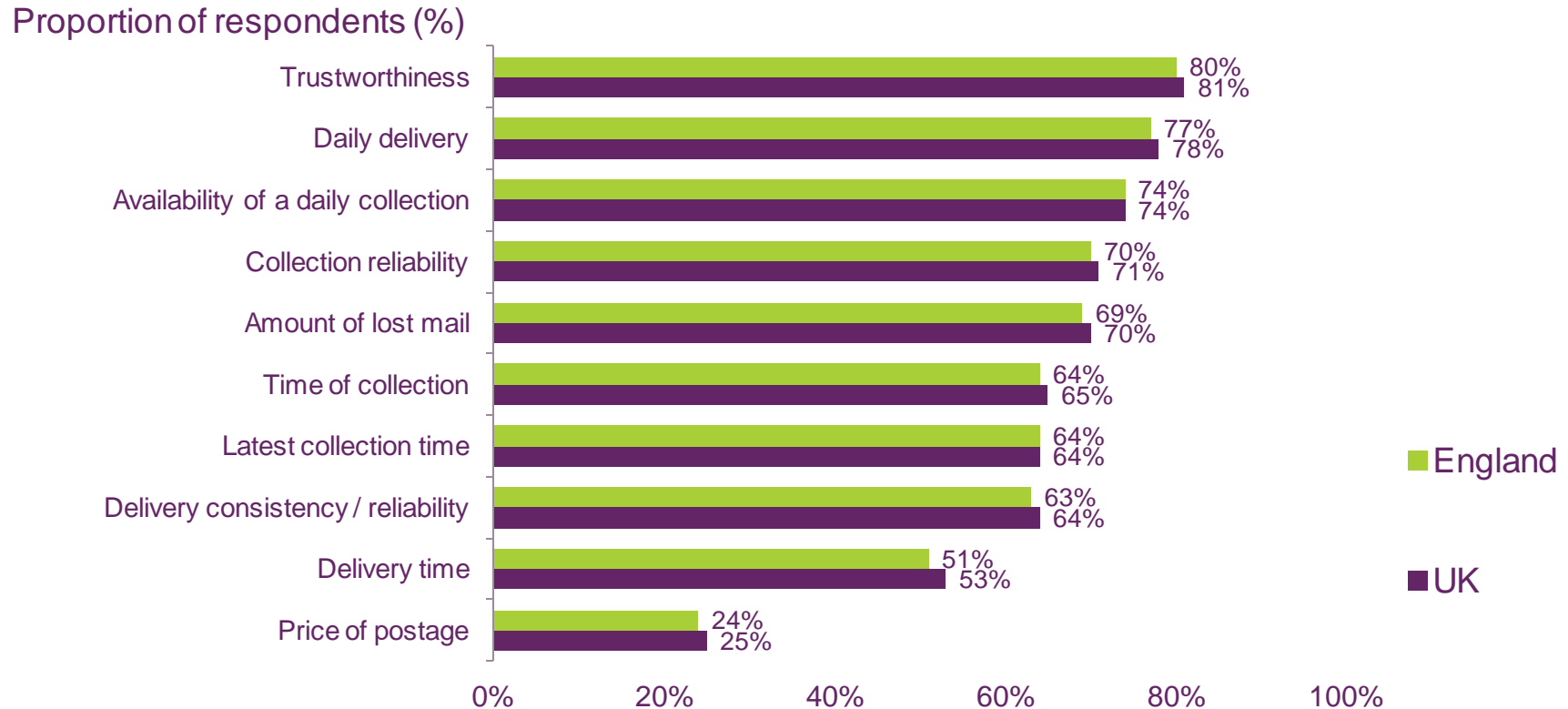


Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

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



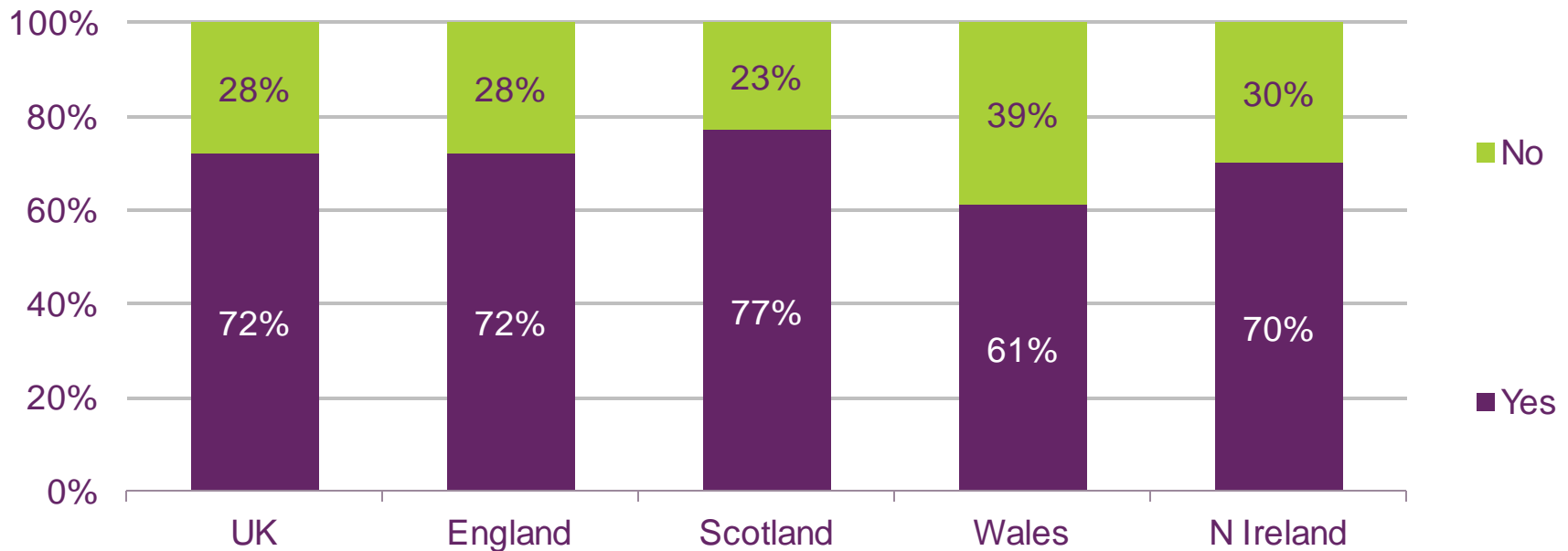
Source: Ofcom Business Postal Tracker, Q3 2012-Q2 2013

Base: All respondents who use Royal Mail (n = 1566 UK, 988 England)

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?