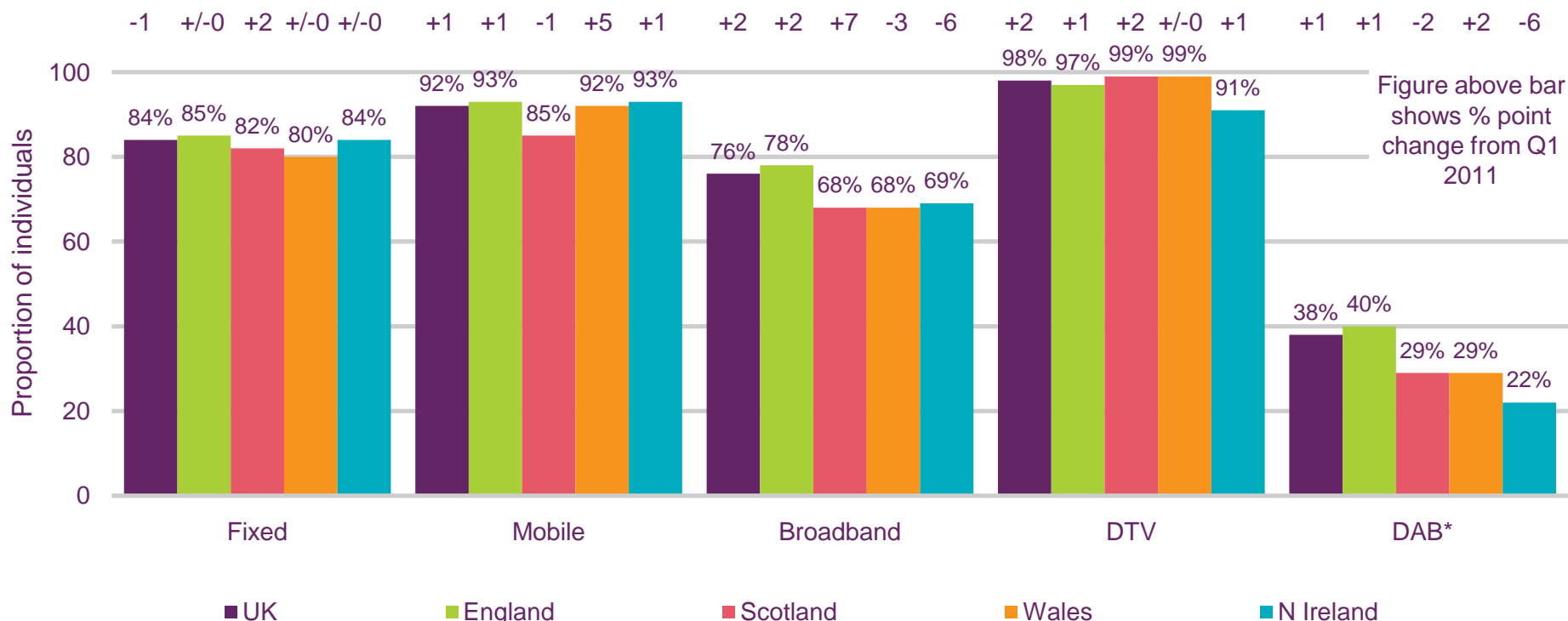


CMR England chart pack 2012

England's communication market

Patterns communications service adoption across the nations, 2012



Source: Ofcom research, Quarter 1 2012

Fixed line base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

Fixed line question: Is there a landline phone in your home that can be used to make and receive calls?

Mobile base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

Mobile question: Do you personally use a mobile phone?

Broadband base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

Broadband question: Which of these methods does your household use to connect to the internet at home?

DTV base: Adults aged 16+ with a TV in the household (n= 3713 UK, 2214 England, 489 Scotland, 508 Wales, 502 Northern Ireland)

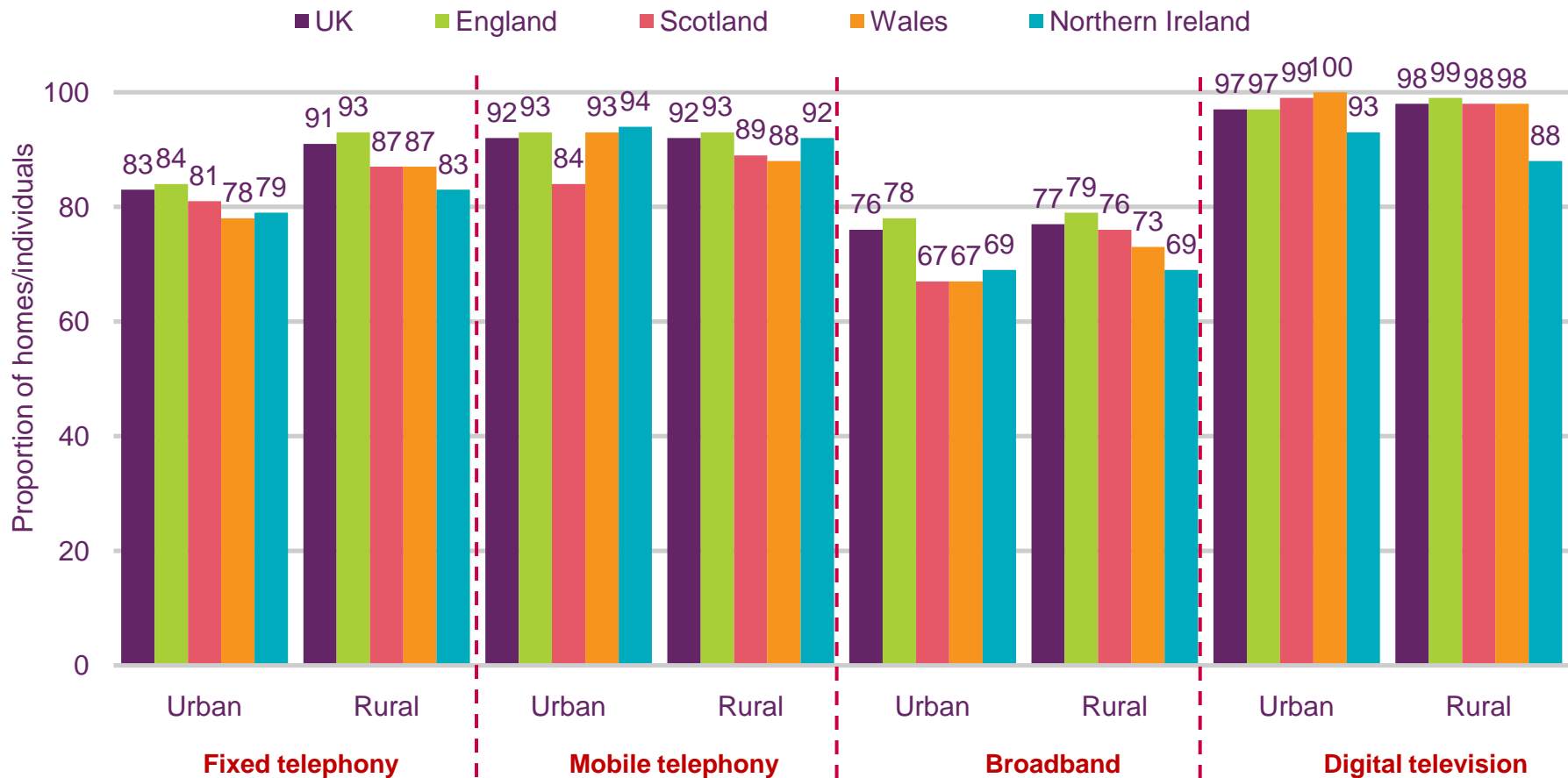
DTV question: Which, if any, of these types of television does your household use at the moment?

DAB base: Adults aged 16+ who listen to radio. *NB Data in 2011 is based on all with any active radio sets in the household who listen to radio (n = 2963 UK, 1790 England, 364 Scotland, 405 Wales, 404 Northern Ireland)

DAB question: How many of these radio sets are digital radios? Response represents those with one or more sets.

Note: Remaining percentages are Don't know responses

Adoption of communications technology/services in urban and rural locations

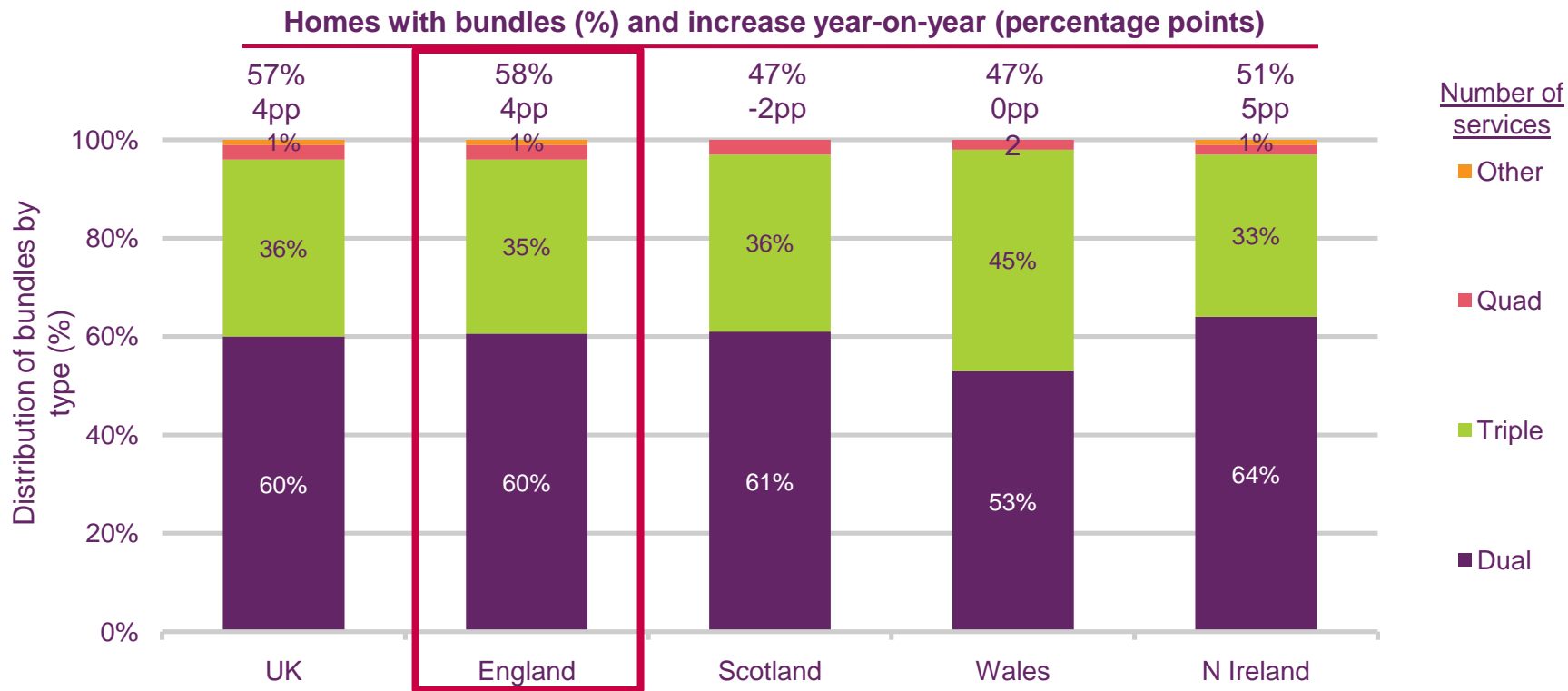


Source: Ofcom research, Quarter 1 2012

Fixed telephony, mobile telephony, broadband base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

DTV base: Adults aged 16+ with a TV in the household (n = 3713 UK, 2214 England, 489 Scotland, 508 Wales, 502 Northern Ireland)

Take-up of bundles, by nation

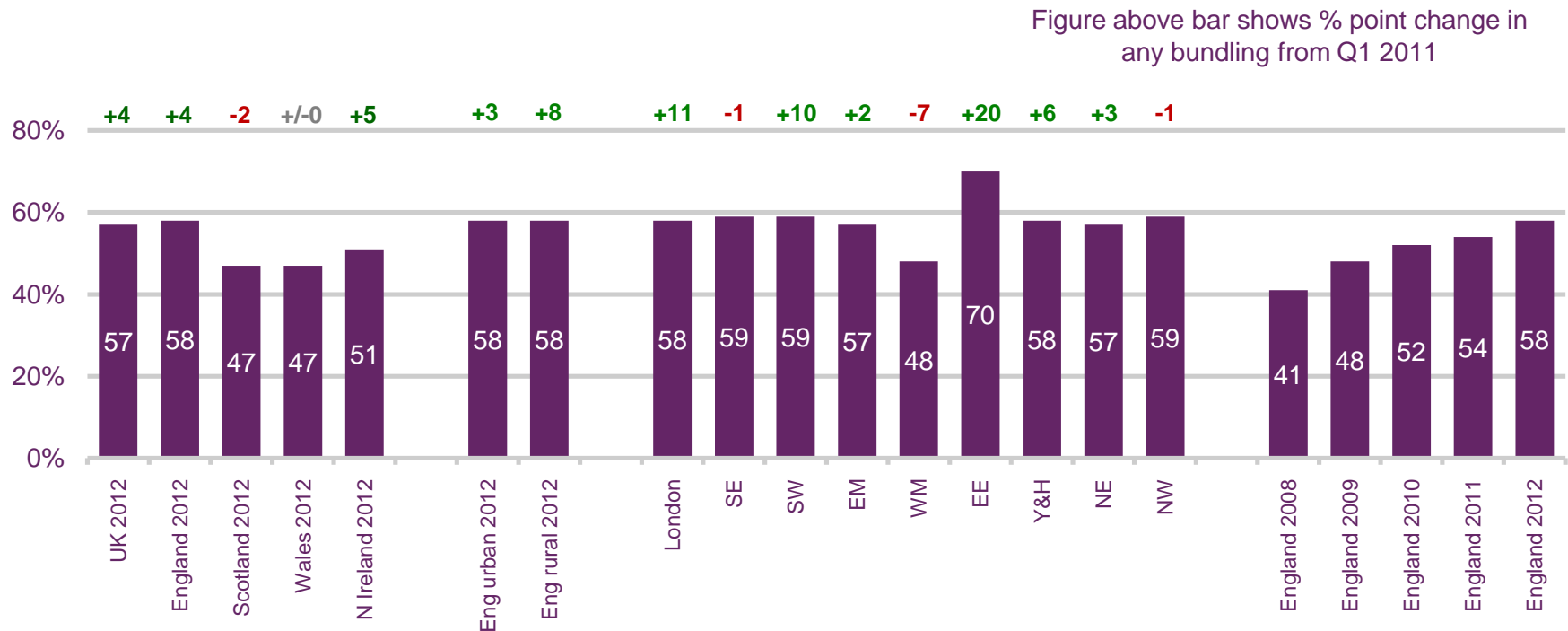


Source: Ofcom research, Q1 2012

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2007 UK, 1276 England, 254 Scotland, 223 Wales, 254 Northern Ireland)

Note: Remaining percentages are Don't know responses

Percentage of consumers buying bundled services

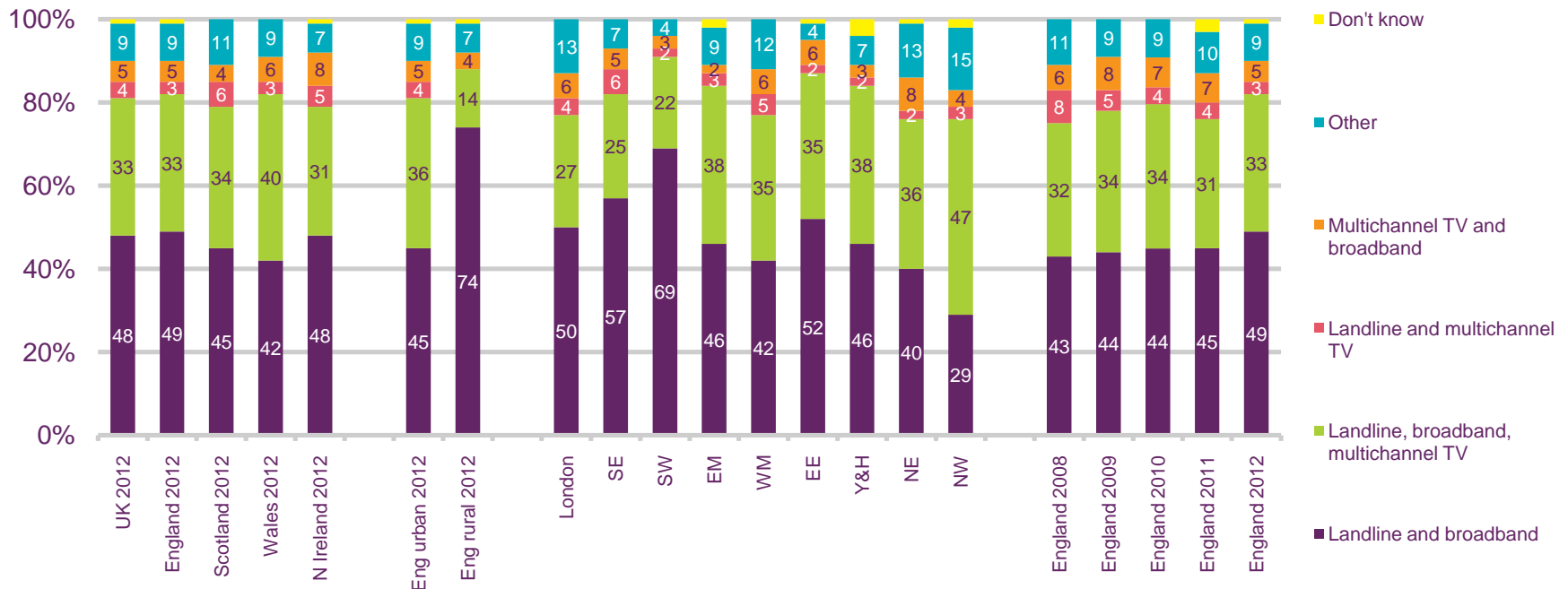


QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ QG3. Do you receive a discount or special deal for subscribing to this package of services?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Trends in purchasing multiple communication services from a single supplier



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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2007 UK, 1276 England, 254 Scotland, 223 Wales, 254 Northern Ireland, 1111 England urban, 165 England rural, 136 London, 142 South East, 149 South West, 145 East Midlands, 110 West Midlands, 174 East of England, 141 Yorkshire & Humber, 138 North East, 141 North West, 1272 England 2008, 1508 England 2009, 2793 England 2010, 1035 England 2011, 1276 England 2012)

Television and audio-visual

Take-up digital TV

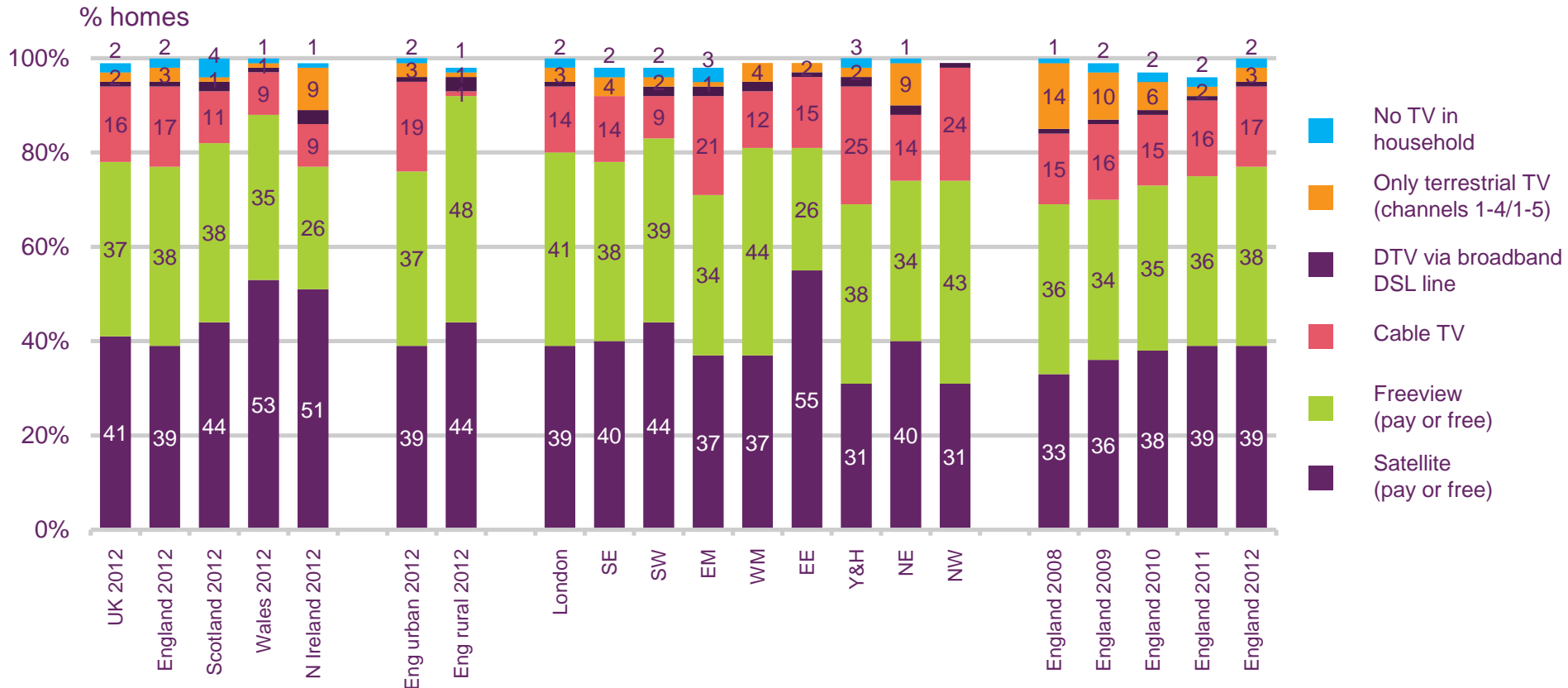


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a TV in household (n = 3713 UK, 2214 England, 489 Scotland, 508 Wales, 502 Northern Ireland, 1928 England urban, 286 England rural, 233 London, 243 South East, 247 South West, 255 East Midlands, 240 West Midlands, 252 East of England, 244 Yorkshire & Humber, 250 North East, 250 North West, 3398 England 2008, 3389 England 2009, 5600 England 2010, 1941 England 2011, 2214 England 2012)

Main TV set share by platform



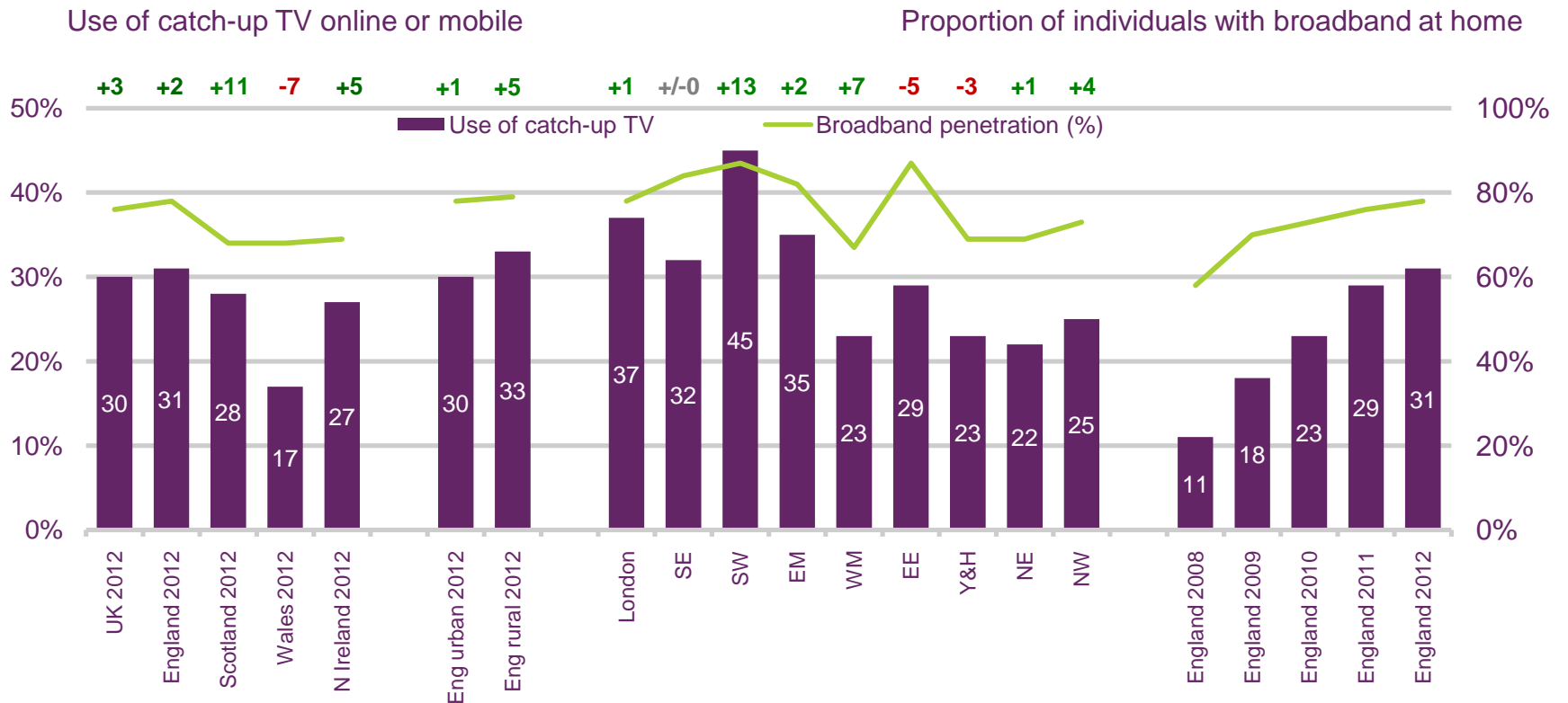
QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Use of catch-up TV

Figure above bar shows % point change in use of catch-up TV from Q1 2011



QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

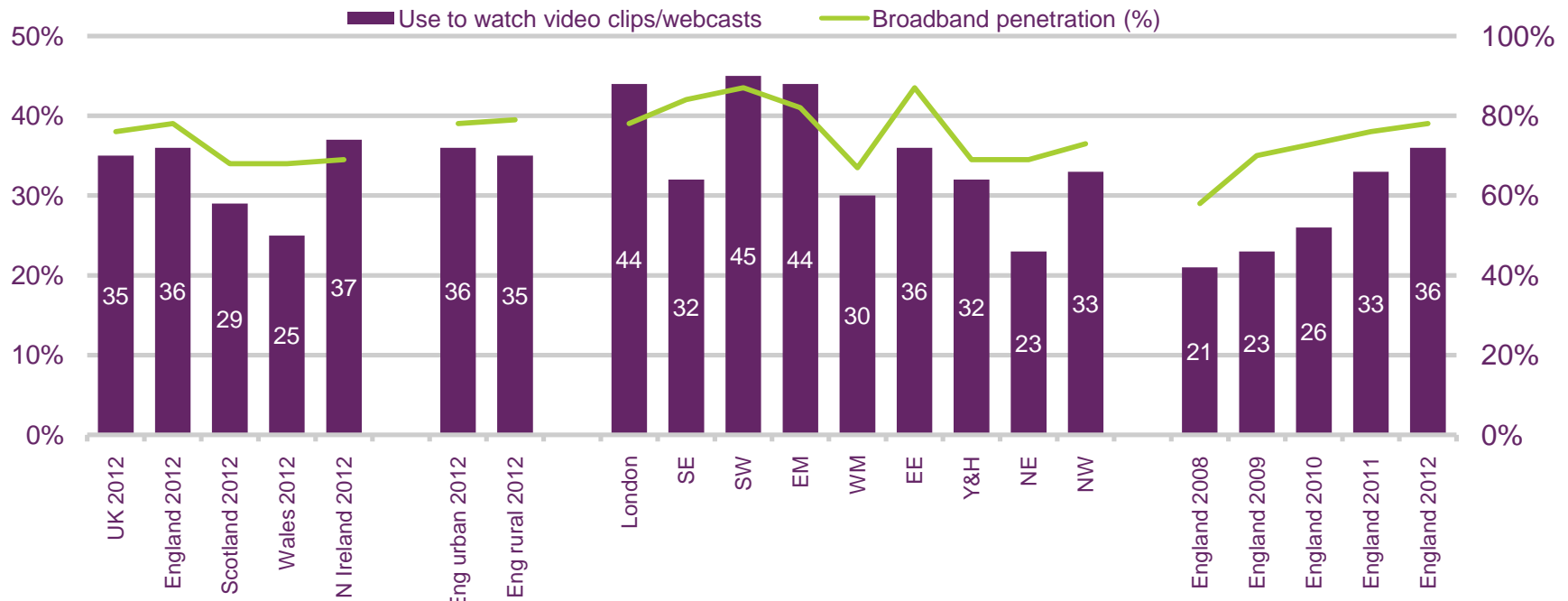
Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5700 England 2010, 1983 England 2011, 2251 England 2012)

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

Use of internet or mobile to watch video clips

Proportion of individuals with broadband at home



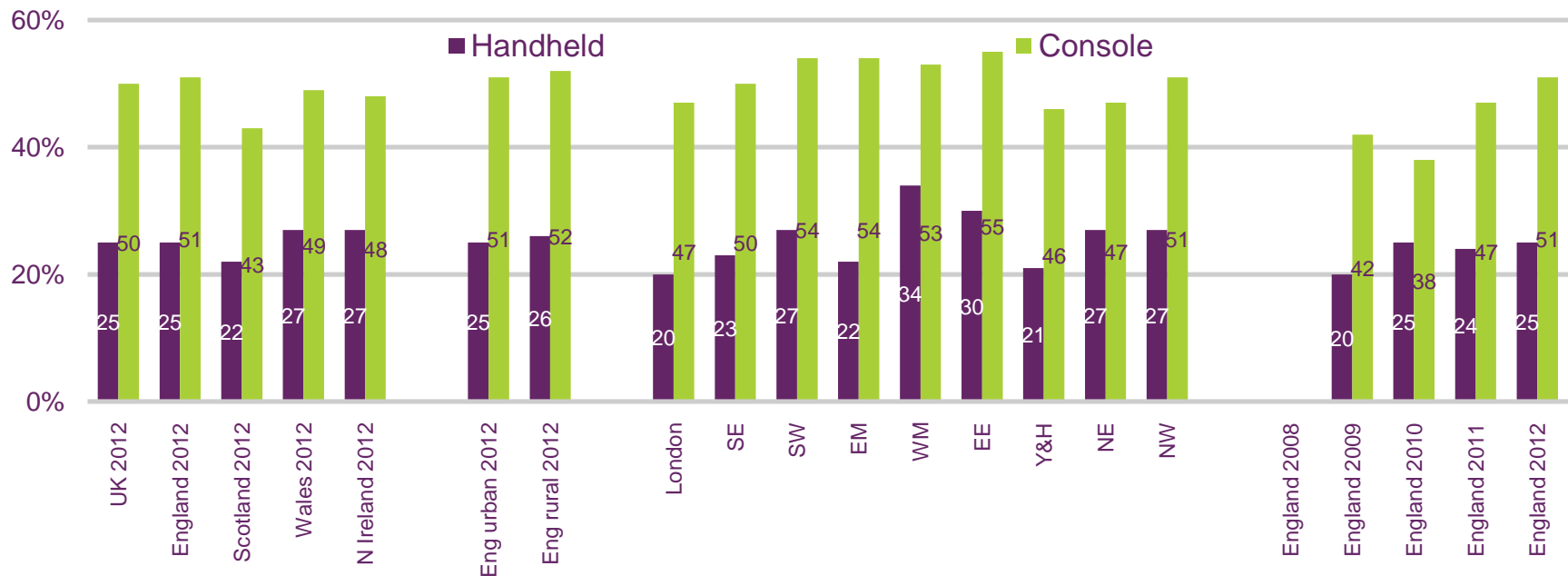
QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? ?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Take up of leading games consoles in England

Take-up (%)

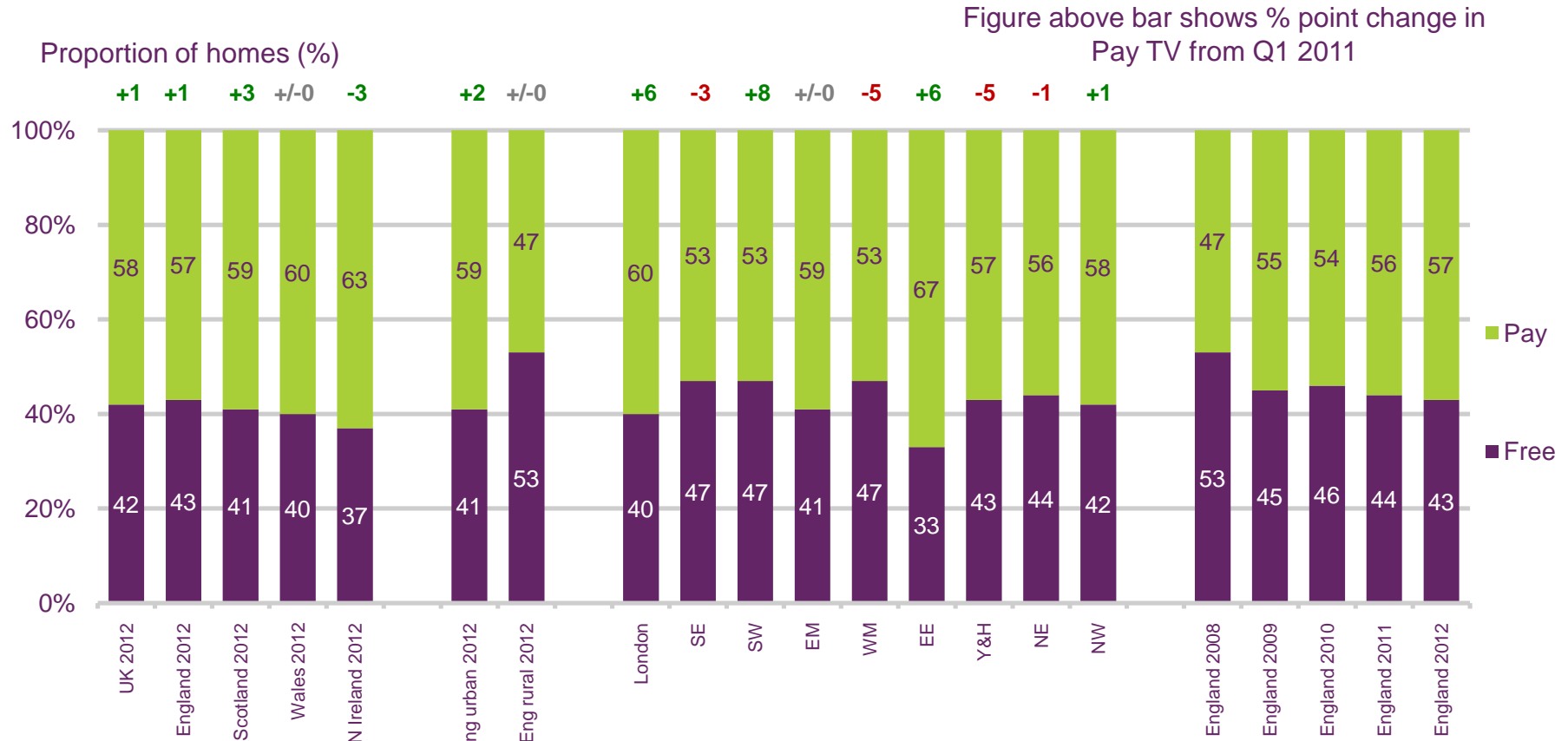


QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Proportion of homes with free and pay television

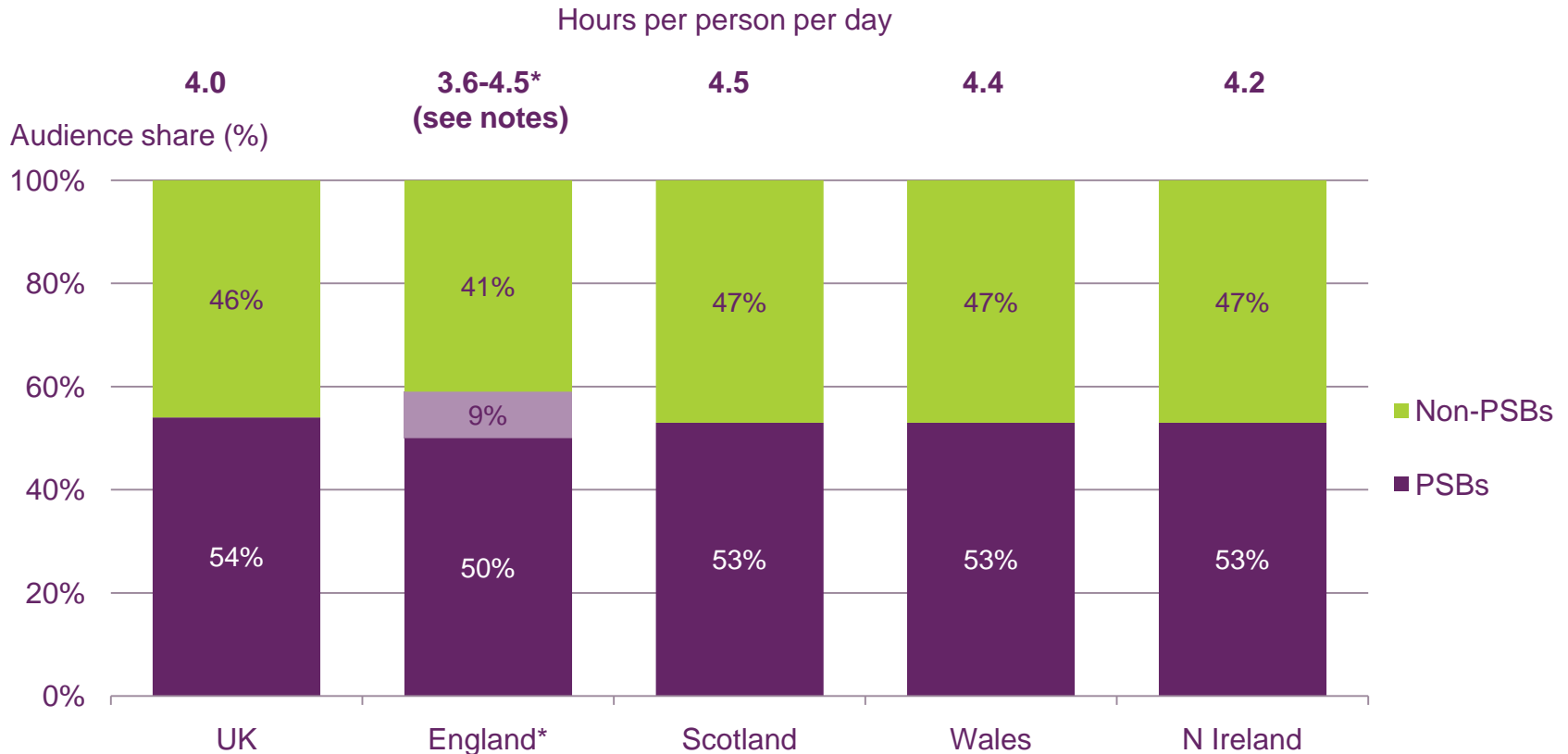


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a TV in household (n = 3713 UK, 2214 England, 489 Scotland, 508 Wales, 502 Northern Ireland, 1928 England urban, 286 England rural, 233 London, 243 South East, 247 South West, 255 East Midlands, 240 West Midlands, 252 East of England, 244 Yorkshire & Humber, 250 North East, 250 North West, 3398 England 2008, 3389 England 2009, 5600 England 2010, 1941 England 2011, 2214 England 2012)

Hours of daily TV viewing, by nation, 2011

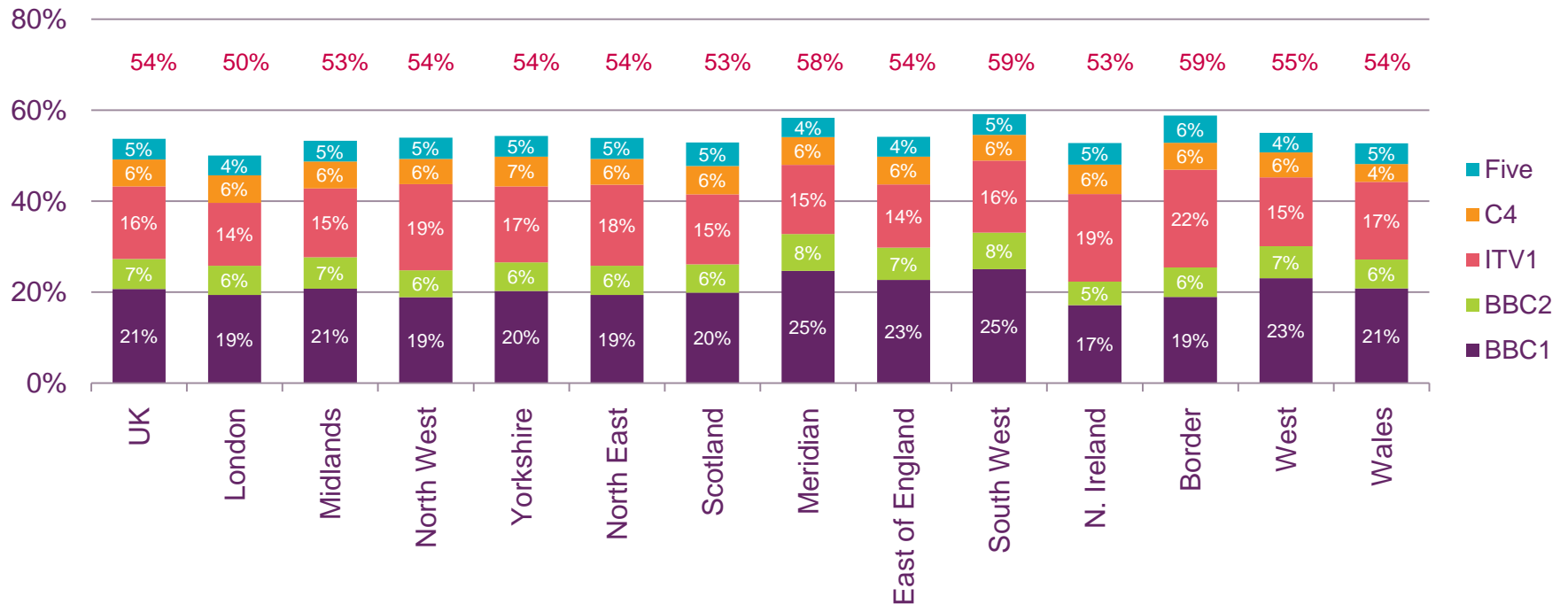


Source: TV = BARB. Based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Five.

***Notes: It is not possible to provide a single figure for 'England' so instead a range is displayed reflecting the regions with the highest (North East) and lowest (West) figures respectively.**

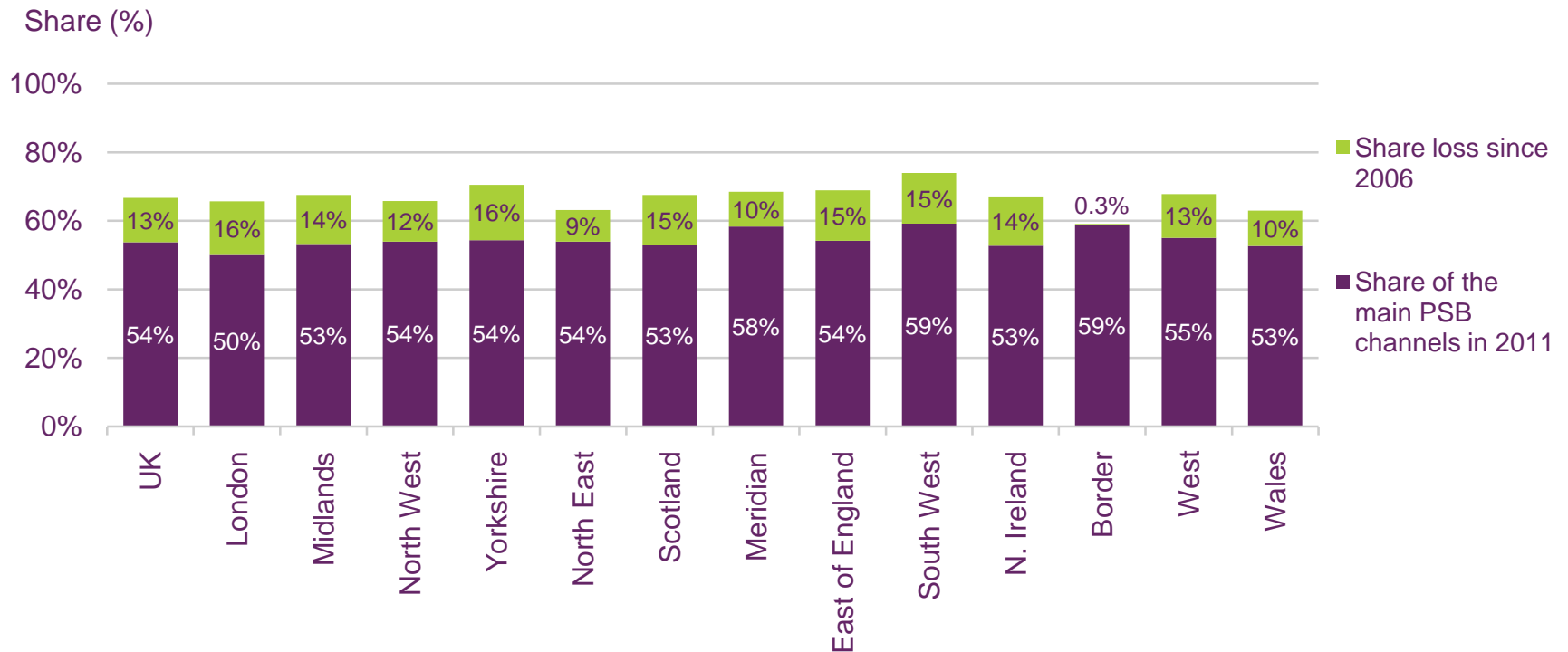
Share of the five main PSB channels in all homes, 2011

Audience share (%)



Source: BARB, all individuals (4+)

Reduction in combined share of the five main PSB channels, all homes, 2006 & 2011

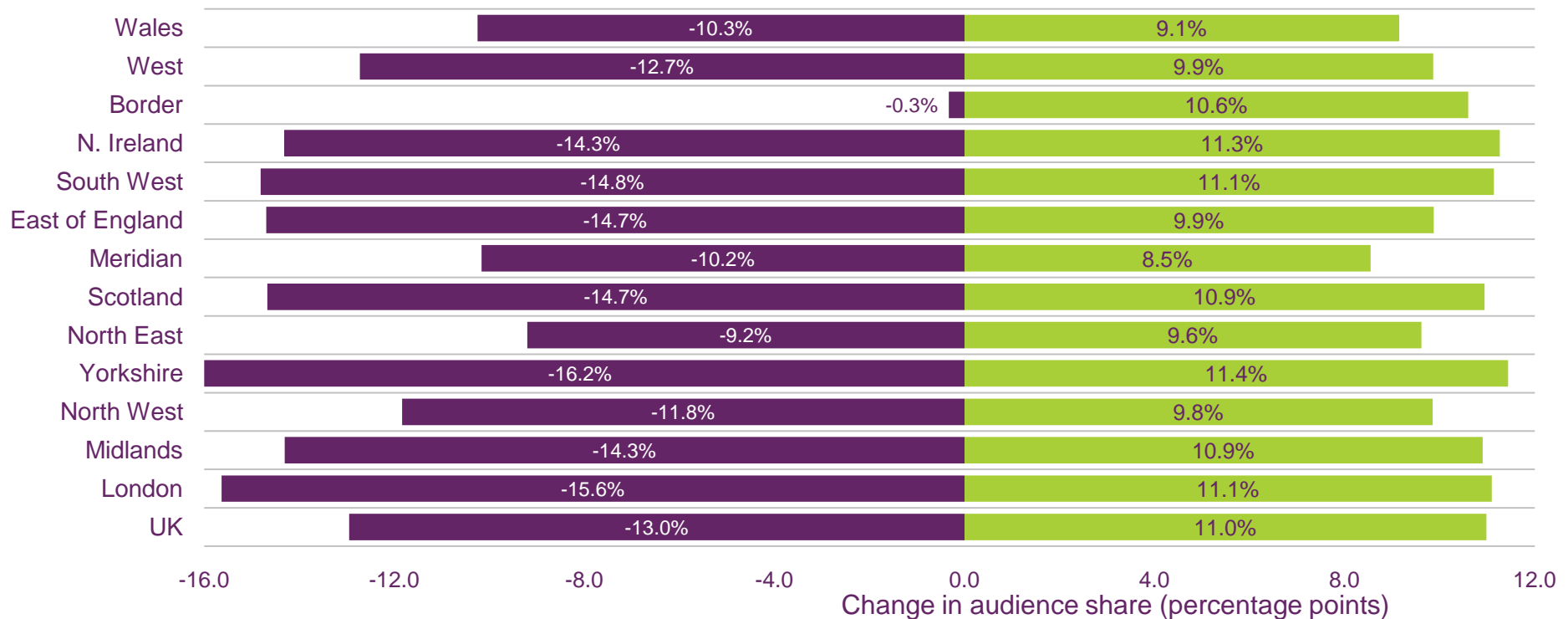


Source: BARB, all individuals (4+)

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.

Net change in the audience share of the five main PSB channels and their portfolio channels, all homes, 2006 - 2011

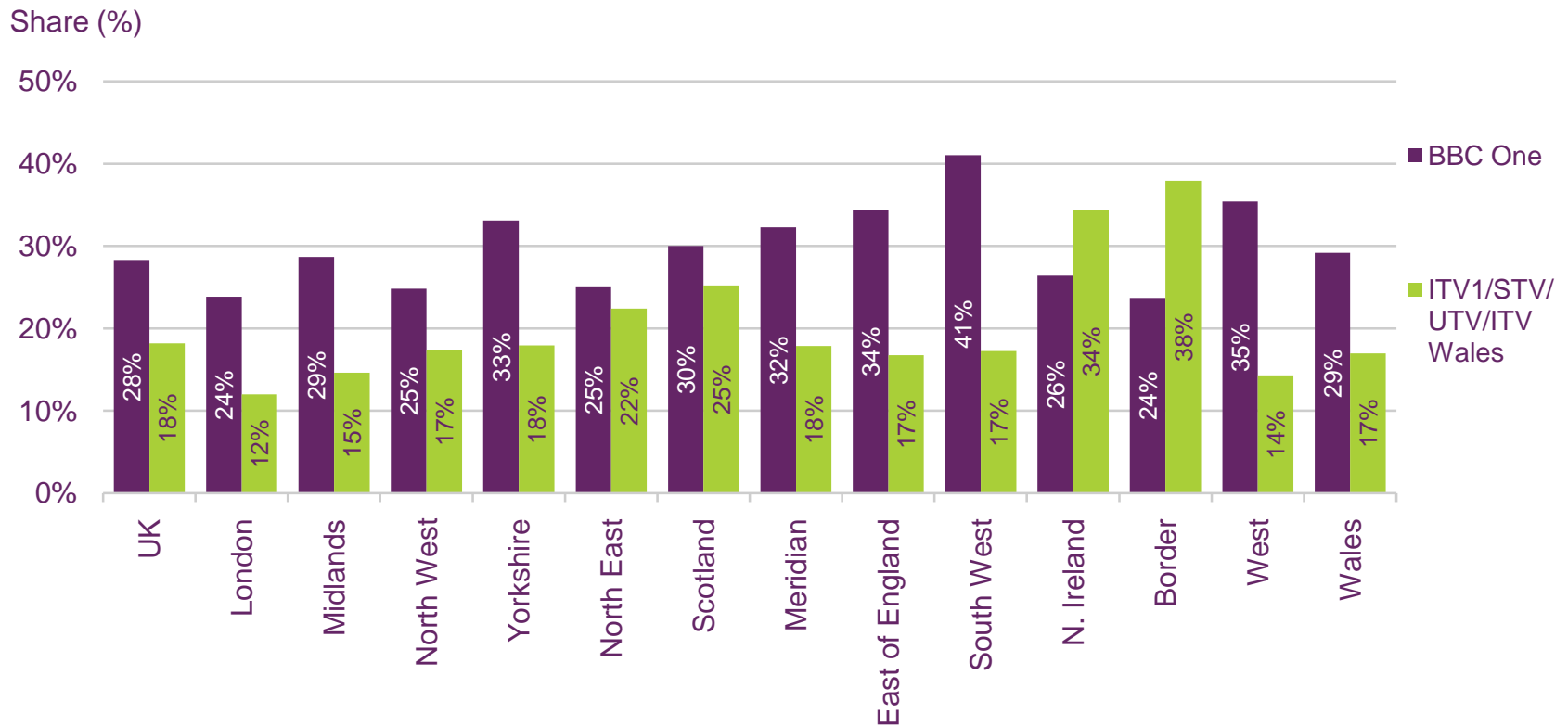
■ Change in total share of five main PSB channels since 2006 ■ Change in total share of the PSB portfolio channels since 2006



Source: BARB, all individuals (4+)

Notes: i) 'PSB portfolio channels' includes all the main PSB's multichannel channels (except for the five terrestrial channels). ii) 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.

BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, all homes, 2011

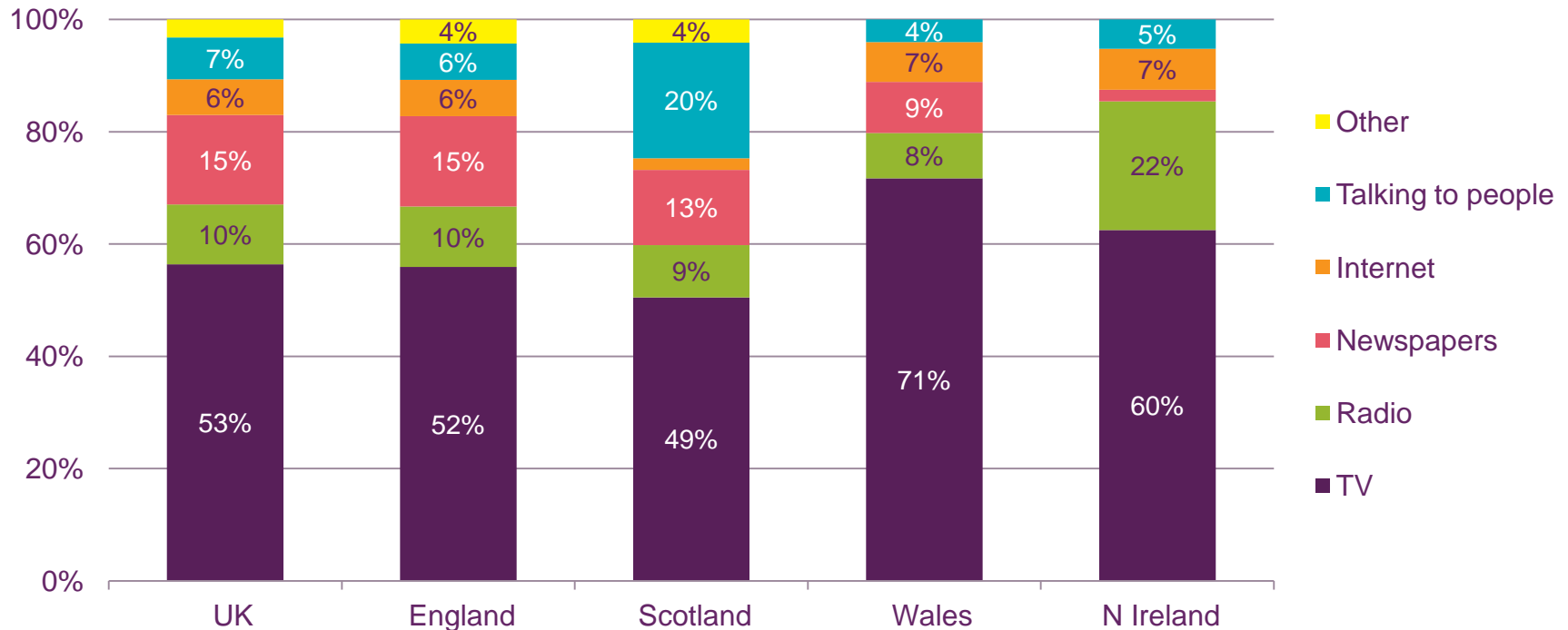


Source: BARB, all individuals (4+)

Note: Based on Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV1, weekdays

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’



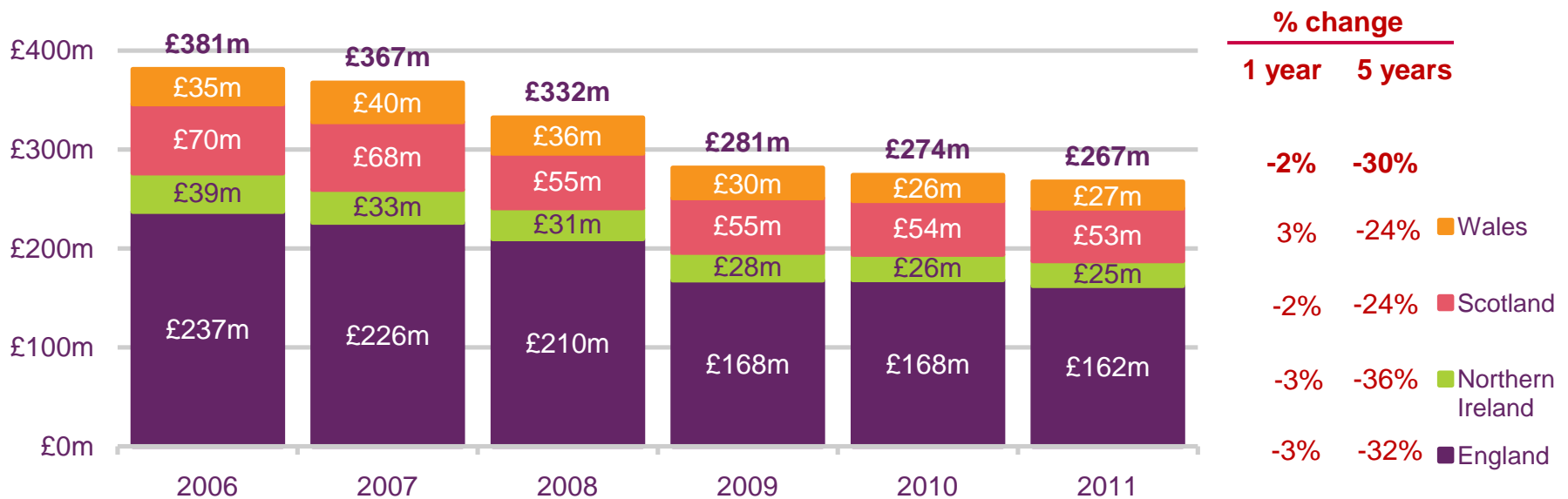
Source: Ofcom Media tracker 2011.

Base: All adults; England (1,369); Scotland (172); Wales (107); Northern Ireland (106).

Only responses $\geq 4\%$ labelled

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

Spend



Source: Broadcasters. All figures expressed in 2011 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 spend on BBC ALBA or BBC spend on S4C output.

Change in total spend on nations and regions content, 2006 - 2011

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
Current Affairs	-13%	-26%	-13%	-31%	-23%	-36%	-8%	5%	-13%	-26%
News	-3%	-22%	-4%	-23%	-4%	-25%	-3%	-20%	2%	-3%
Non-news/non-current affairs	2%	-43%	-16%	-88%	2%	-42%	2%	-27%	7%	-35%
Total Spend in 2011	£272m		£165m		£25m		£55m		£27m	

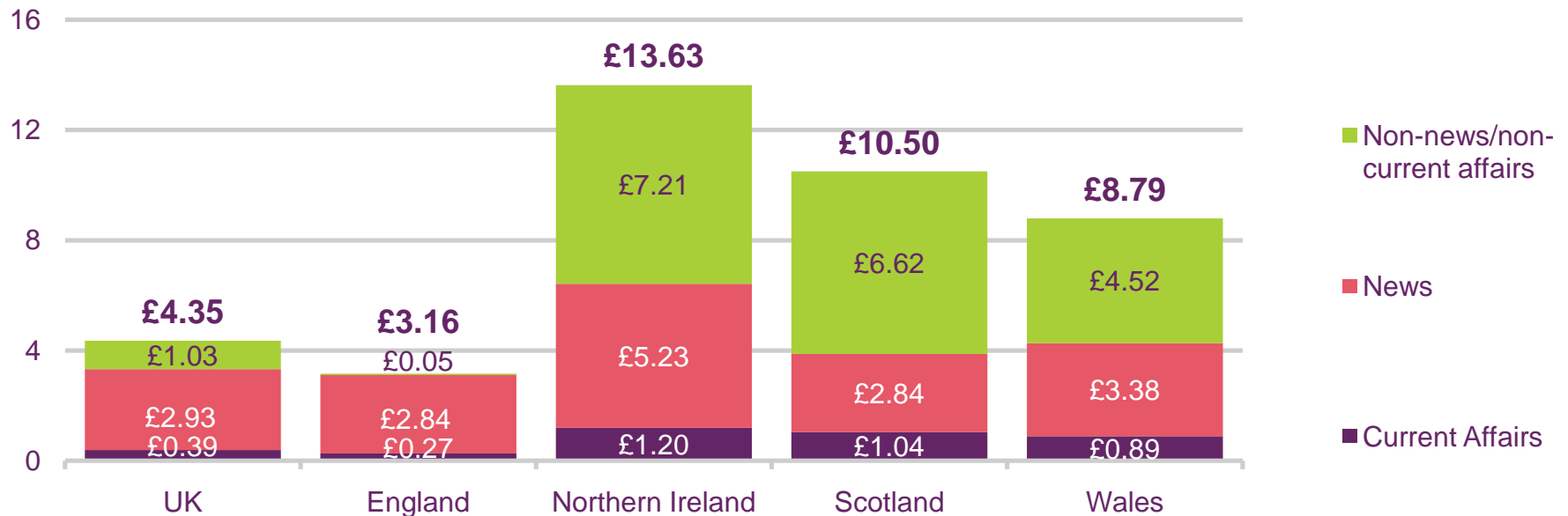
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-3%	-29%	-5%	-30%	-3%	-36%	-1%	-23%	3%	-24%

Source: Broadcasters. All figures expressed in 2011 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 spend on BBC ALBA or BBC spend on S4C output.

Total spend per head by the BBC/ITV1/STV/UTV on nations/regions output

Spend per head (£ per head)



Source: Broadcasters. All figures expressed in 2011 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.

Hours of first-run originated nations/regions output, by genre and broadcaster: 2011

2011 total first-run originated hours

11,648 hrs

6,763 hrs

931 hrs

2,938 hrs

1,016 hrs

Change since 2010

6%

0%

-8%

32%

1%

Change since 2006

-1%

-14%

-17%

86%

-22%



Source: PSB returns

Note: Hours data for first-run originations only. 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.

Cost per hour of total nations and regions output, by nation: 2006 – 2011

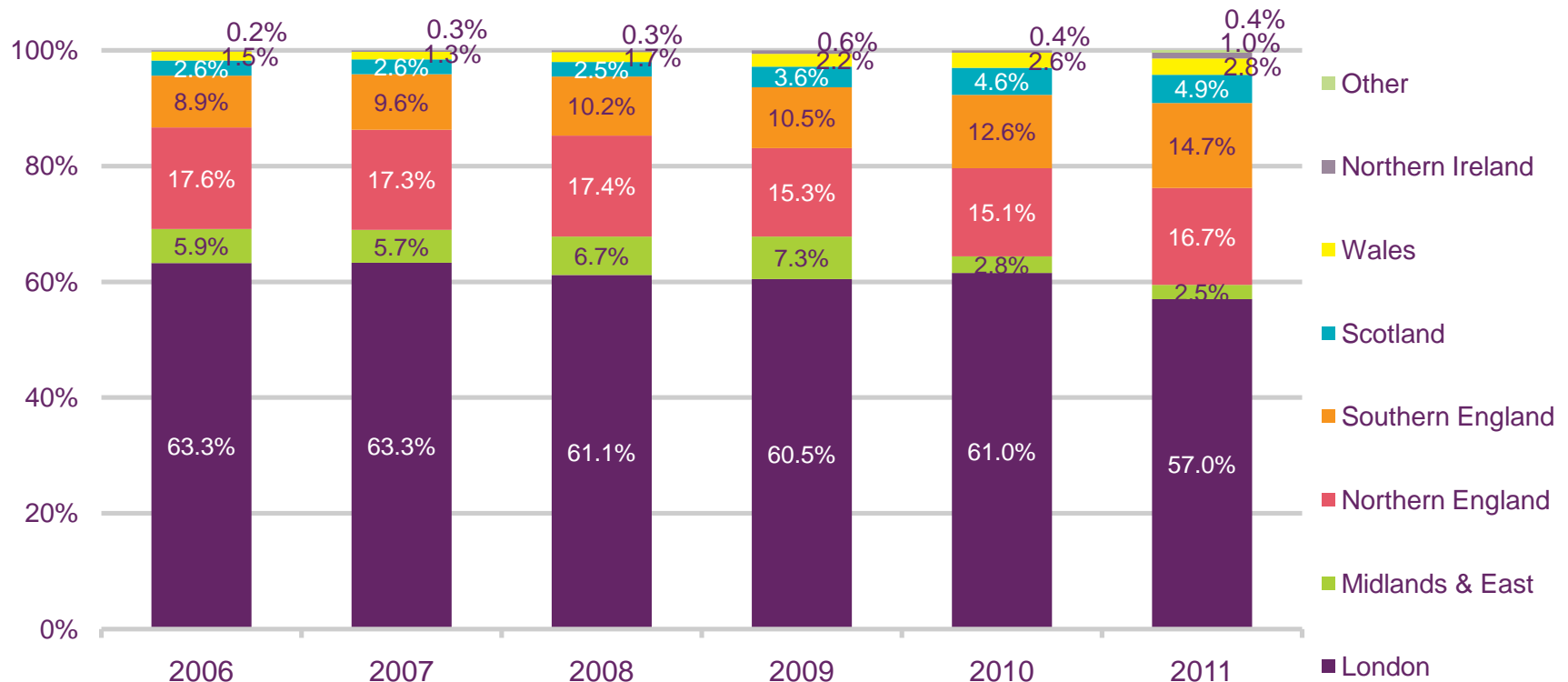


Source: Broadcasters. All figures expressed in 2011 prices.

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 network originated programming - out-of-London production

Percentage of production by value



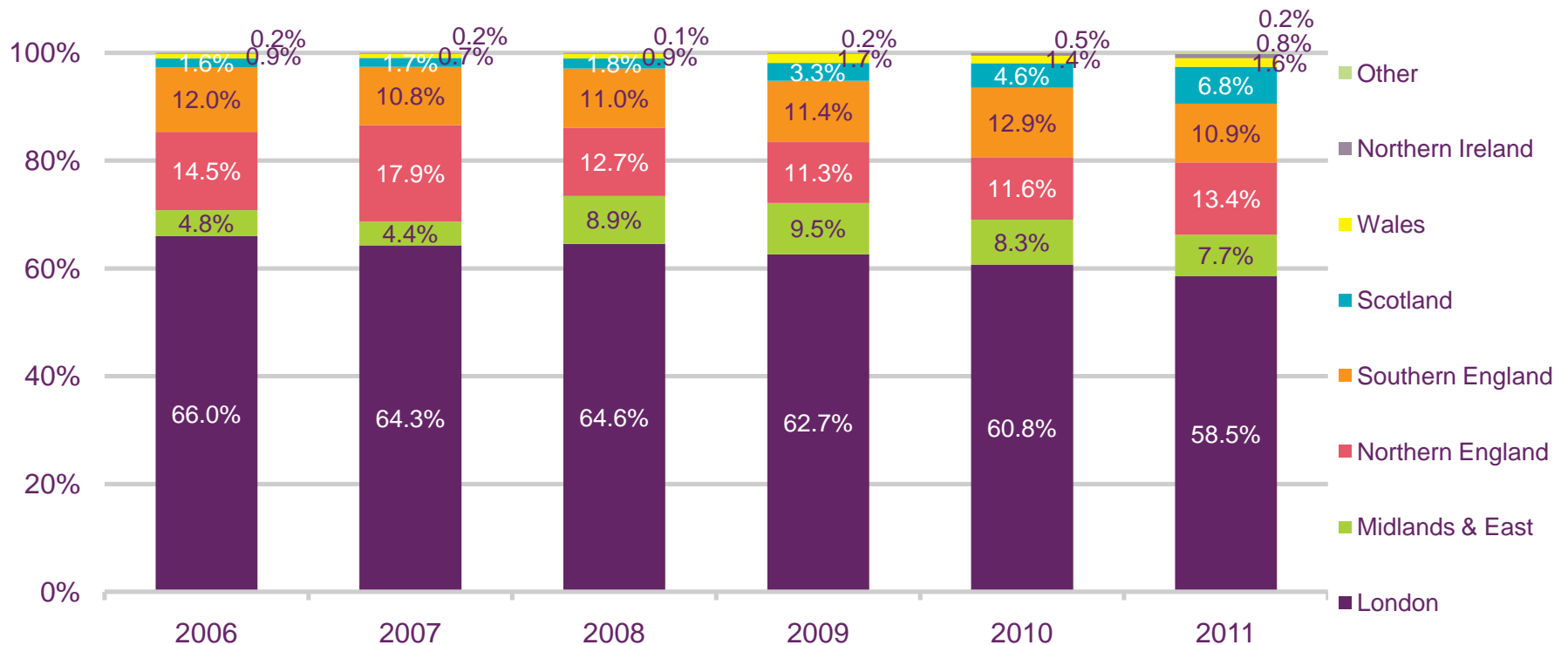
Source: Ofcom/broadcasters

Note: A new category 'Other' 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 network originated programming - out-of-London production

Percentage of production by volume



Source: Ofcom/broadcasters

Note: A new category 'Other' 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

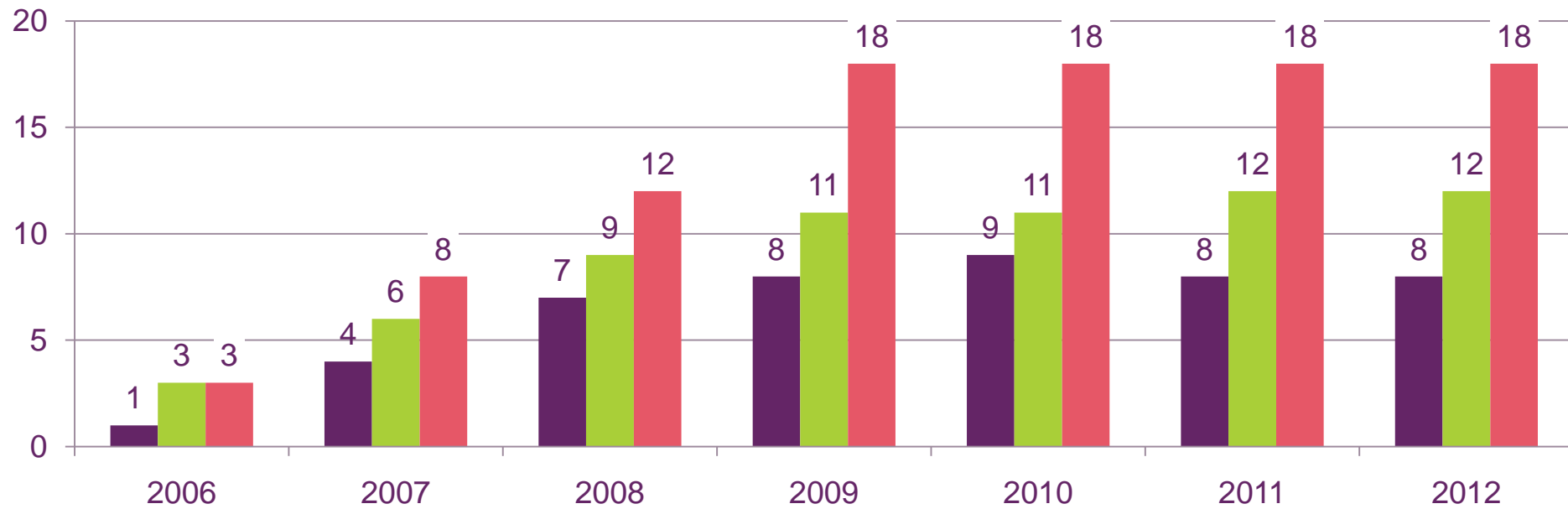
http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on Ofcom website for further details.

Radio and audio content

Number of community radio stations on air, 2006-2012

	2006	2007	2008	2009	2010	2011	2012
England	29	72	95	126	146	160	159
UK	36	90	123	163	184	199	197

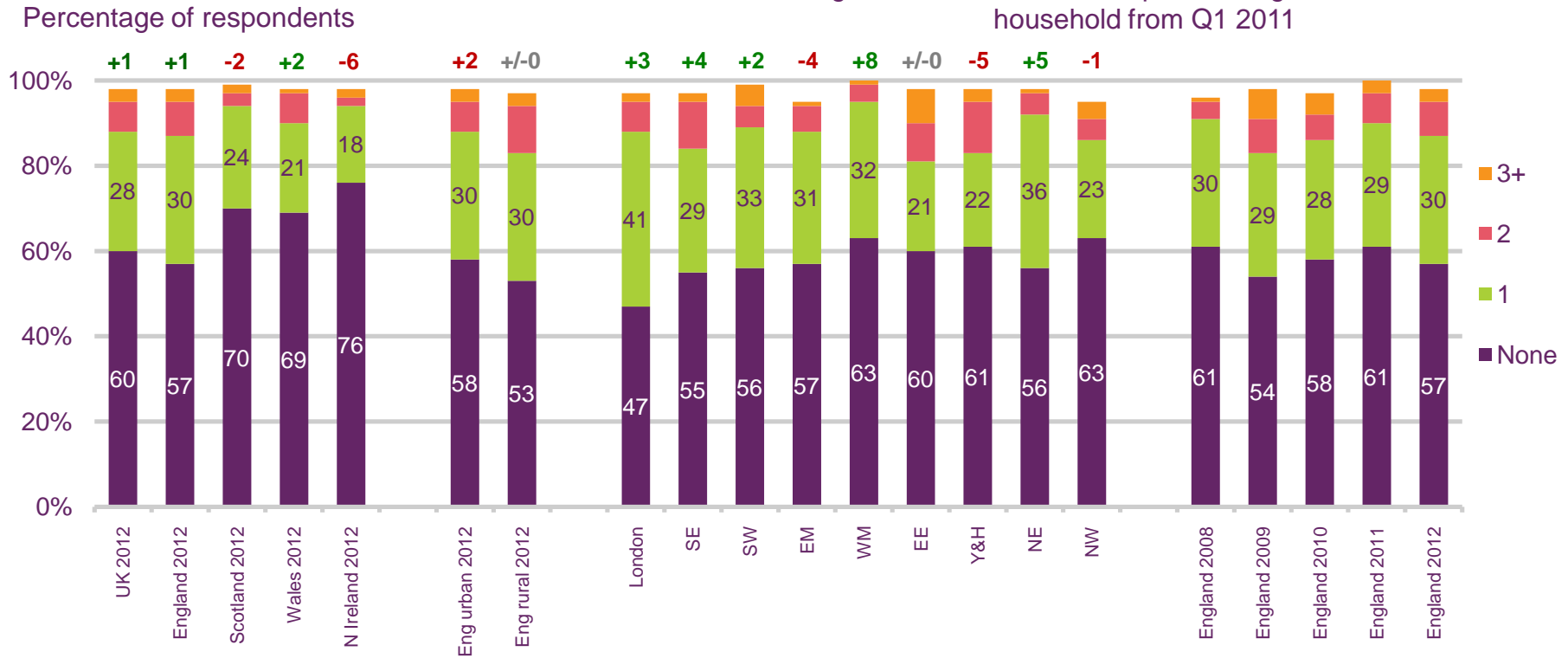
■ Wales ■ Northern Ireland ■ Scotland



Source: Ofcom, April 2012

Ownership of DAB digital radios

Figure above bar shows % point change in DAB sets in household from Q1 2011

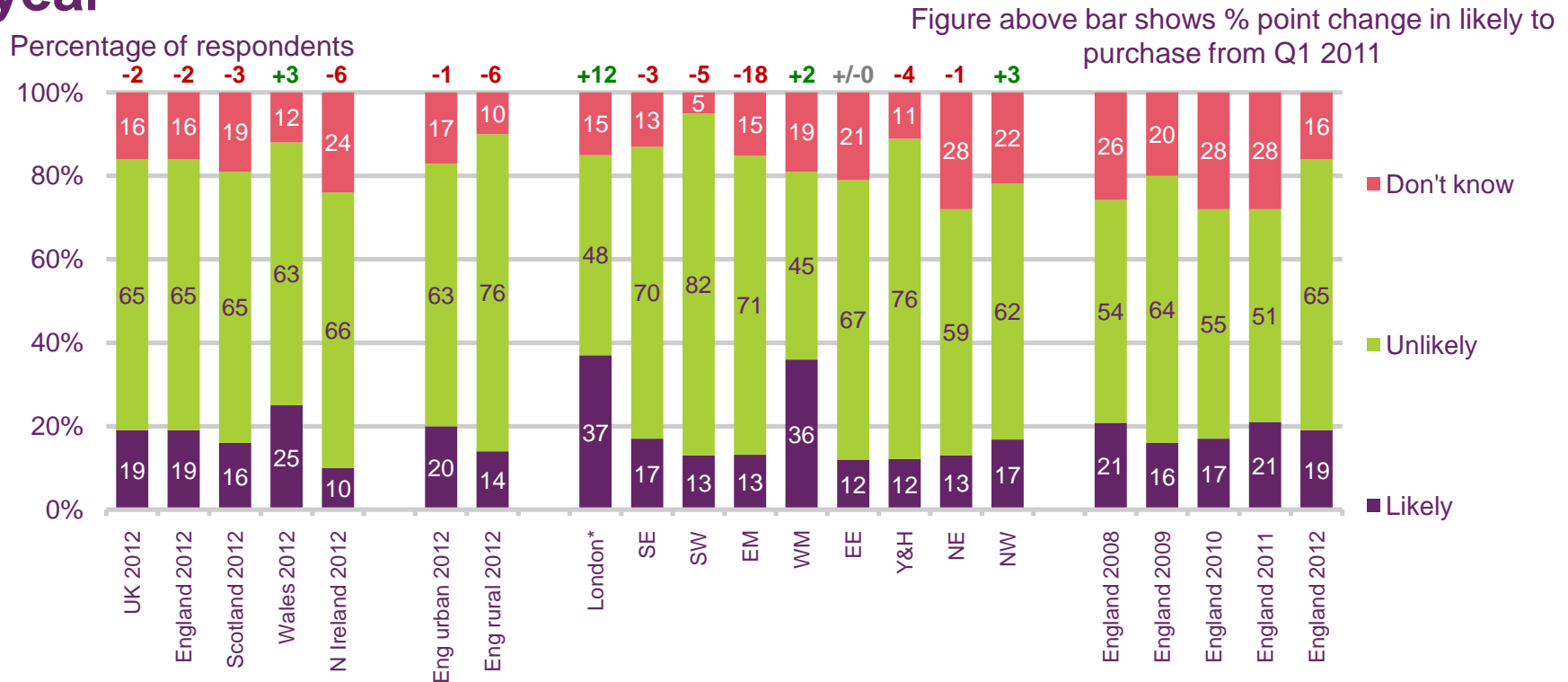


Own DAB	38%	40%	29%	29%	22%	40%	44%	51%	42%	42%	39%	37%	38%	37%	42%	32%	35%	44%	39%	39%	40%
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Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Source: Ofcom research, Quarter 1 2012
 Base: Adults aged 16+ who listen to radio (n = 2963 UK, 1790 England, 364 Scotland, 405 Wales, 404 Northern Ireland, 1545 England urban, 245 England rural, 170 London, 217 South East, 219 South West, 199 East Midlands, 180 West Midlands, 222 East of England, 205 Yorkshire & Humber, 185 North East, 193 North West, 2870 England 2008, 2819 England 2009, 4476 England 2010, 1629 England 2011, 1790 England 2012)
 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



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

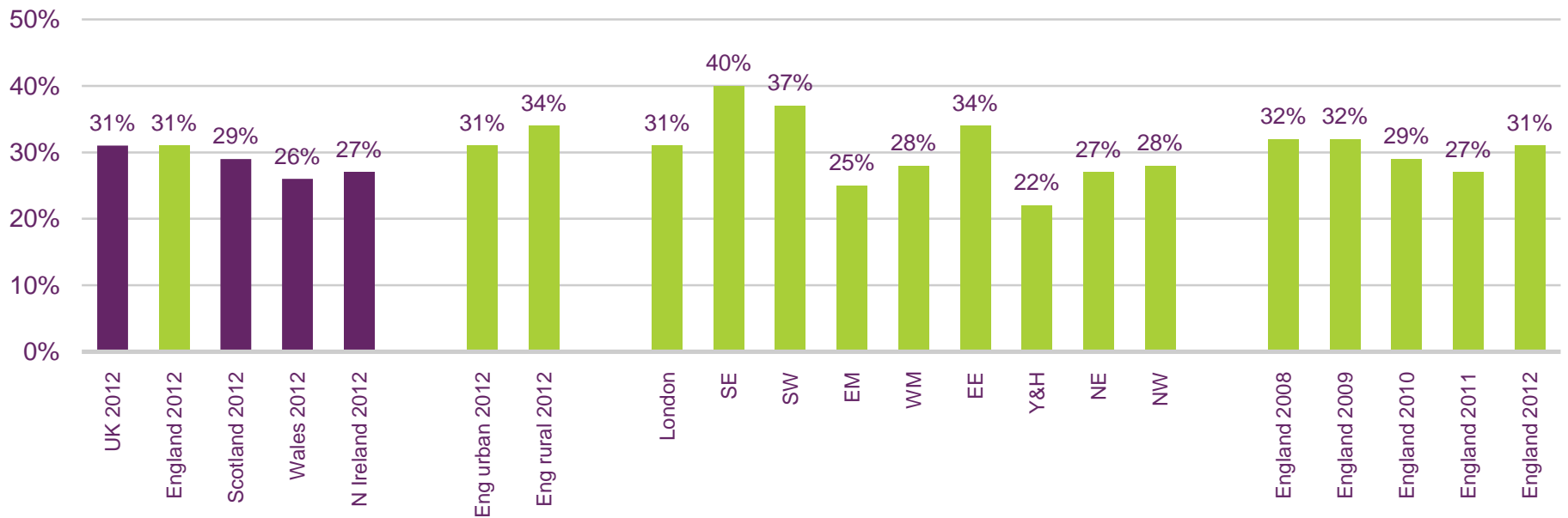
Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1855 UK, 1034 England, 243 Scotland, 273 Wales, 305 Northern Ireland, 904 England urban, 130 England rural, 81 London, 119 South East, 123 South West, 114 East Midlands, 113 West Midlands, 133 East of England, 128 Yorkshire & Humber, 104 North East, 119 North West, 1794 England 2008, 1706 England 2009, 2690 England 2010, 703 England 2011, 1034 England 2012).

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)



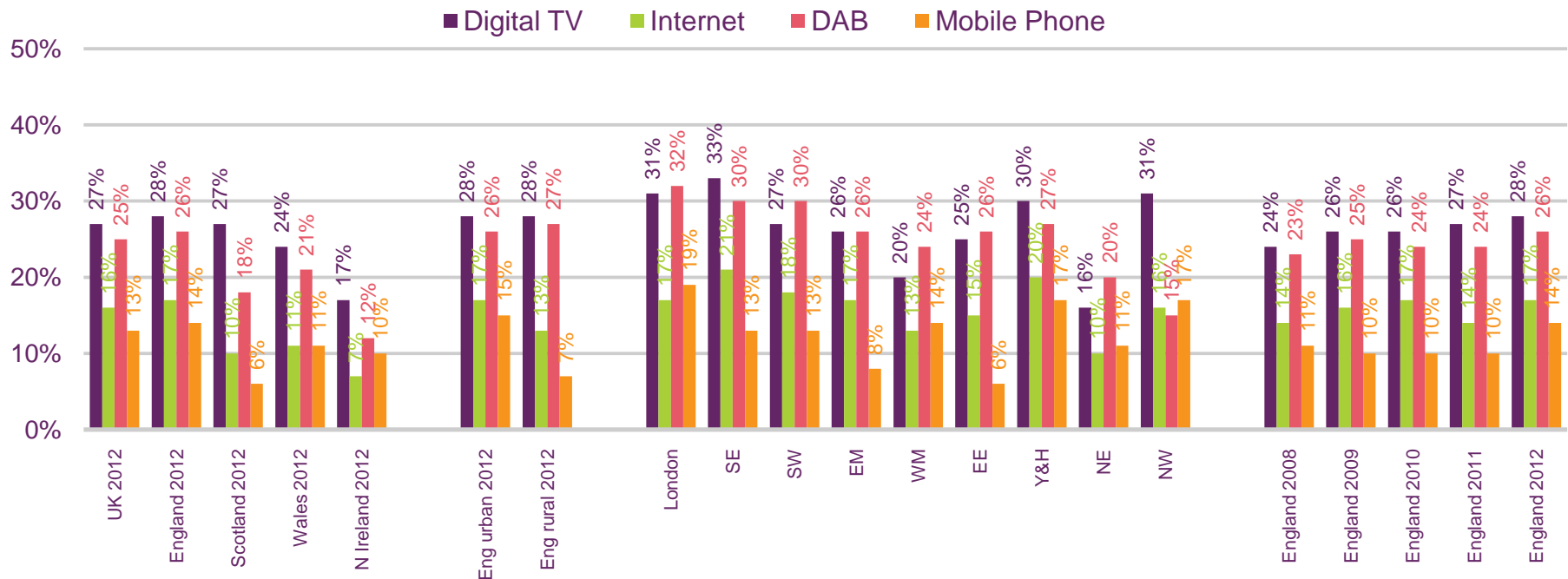
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Listening to radio via internet, DTV, mobile phone

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, mobile phone?

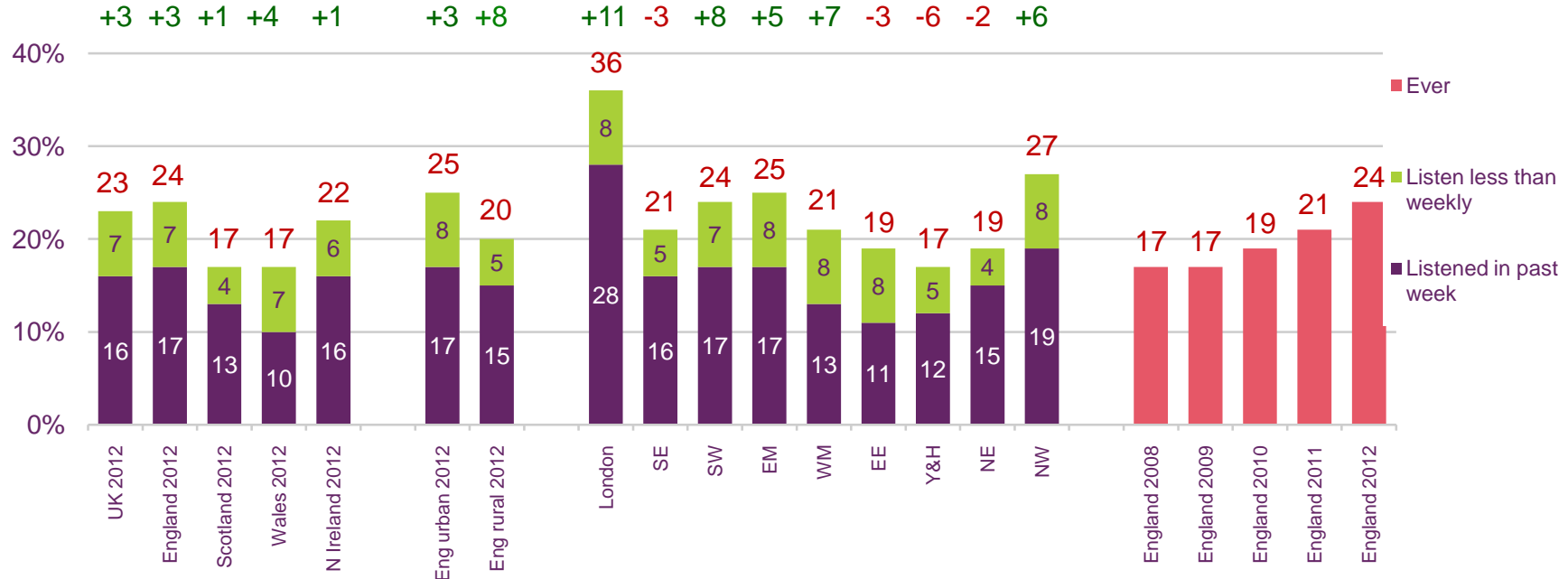
Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

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 2011

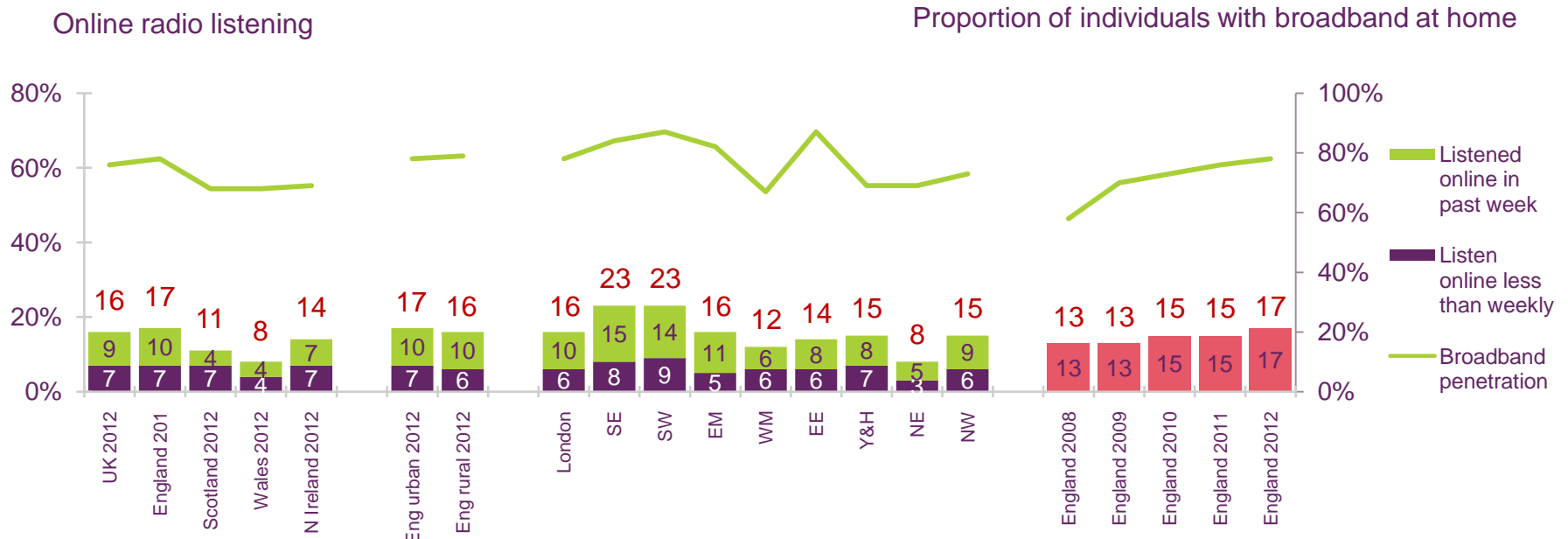


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Proportion of adults living in a household that has used the internet to listen to radio

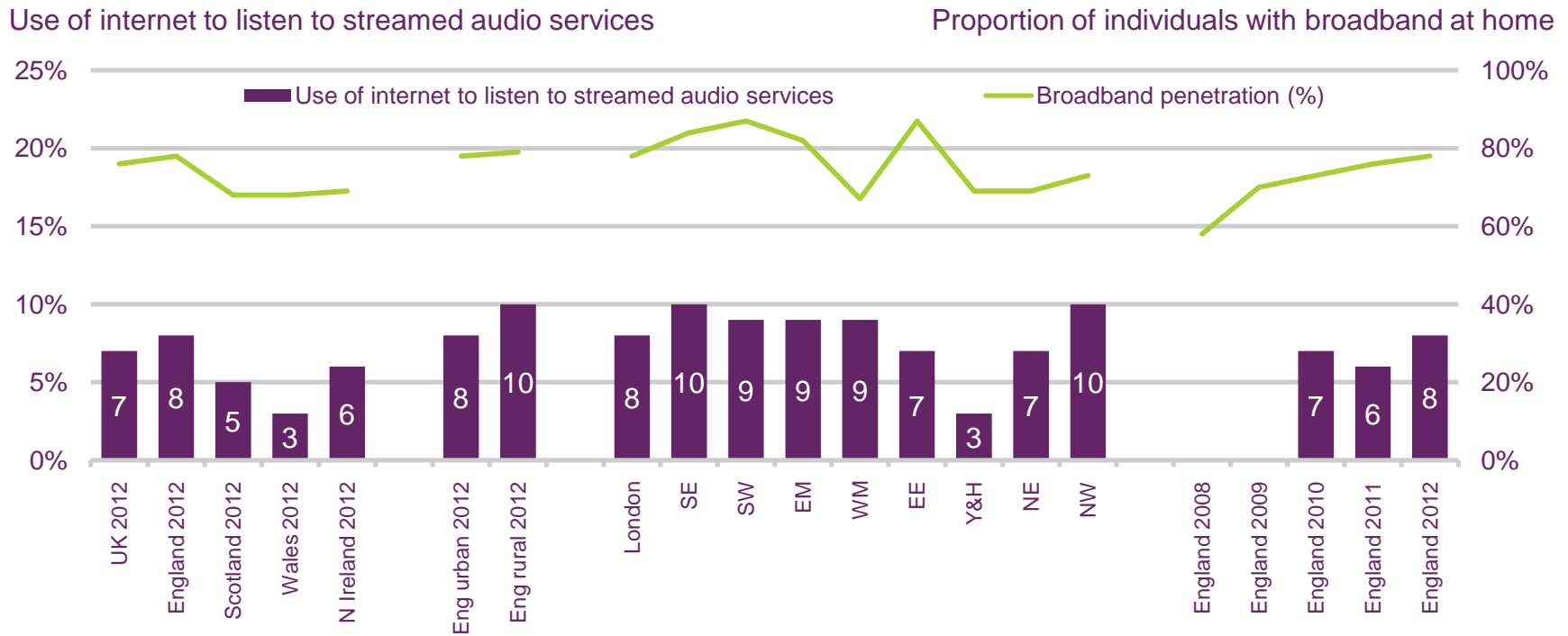


QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Use of internet for listening to streamed audio services



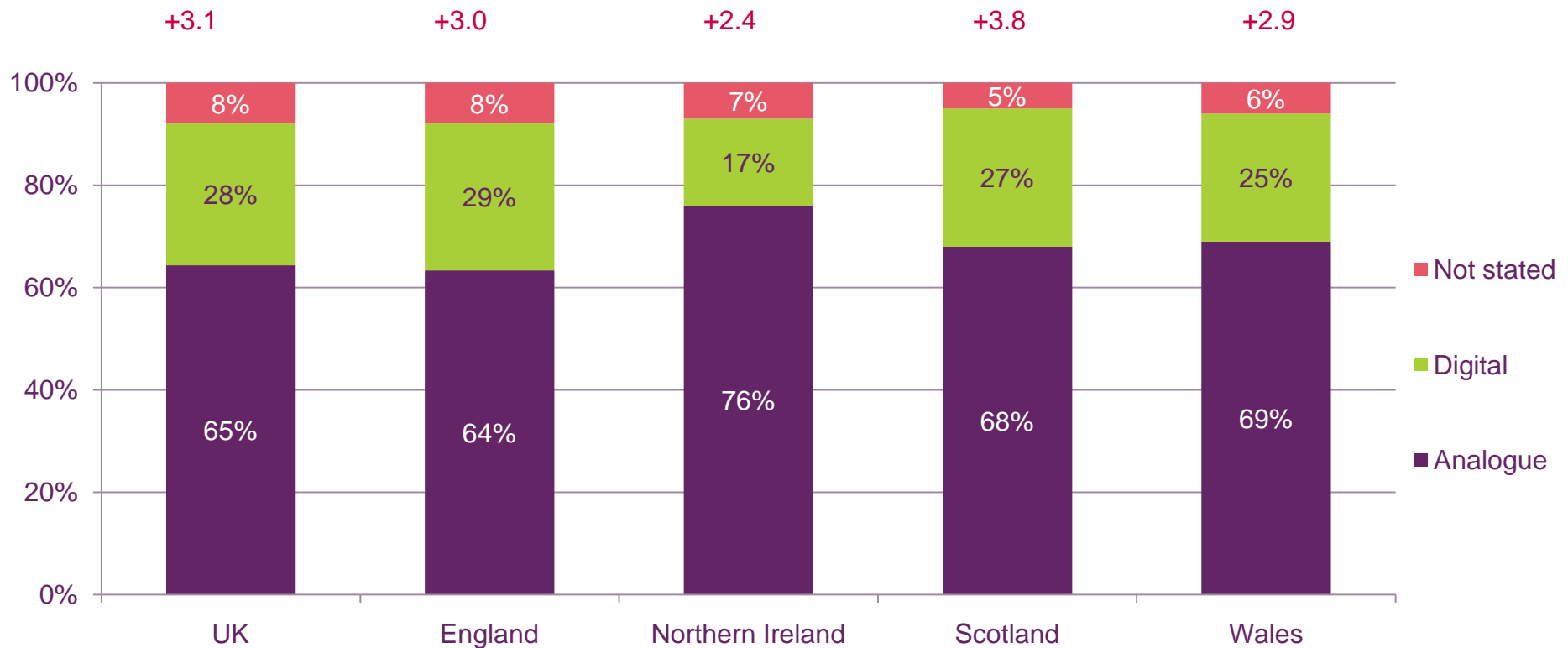
QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Share of listening hours via digital and analogue platforms, 2011

Digital listening year on year (percentage points)



Source: RAJAR, All adults (15+), year ended Q4 2011

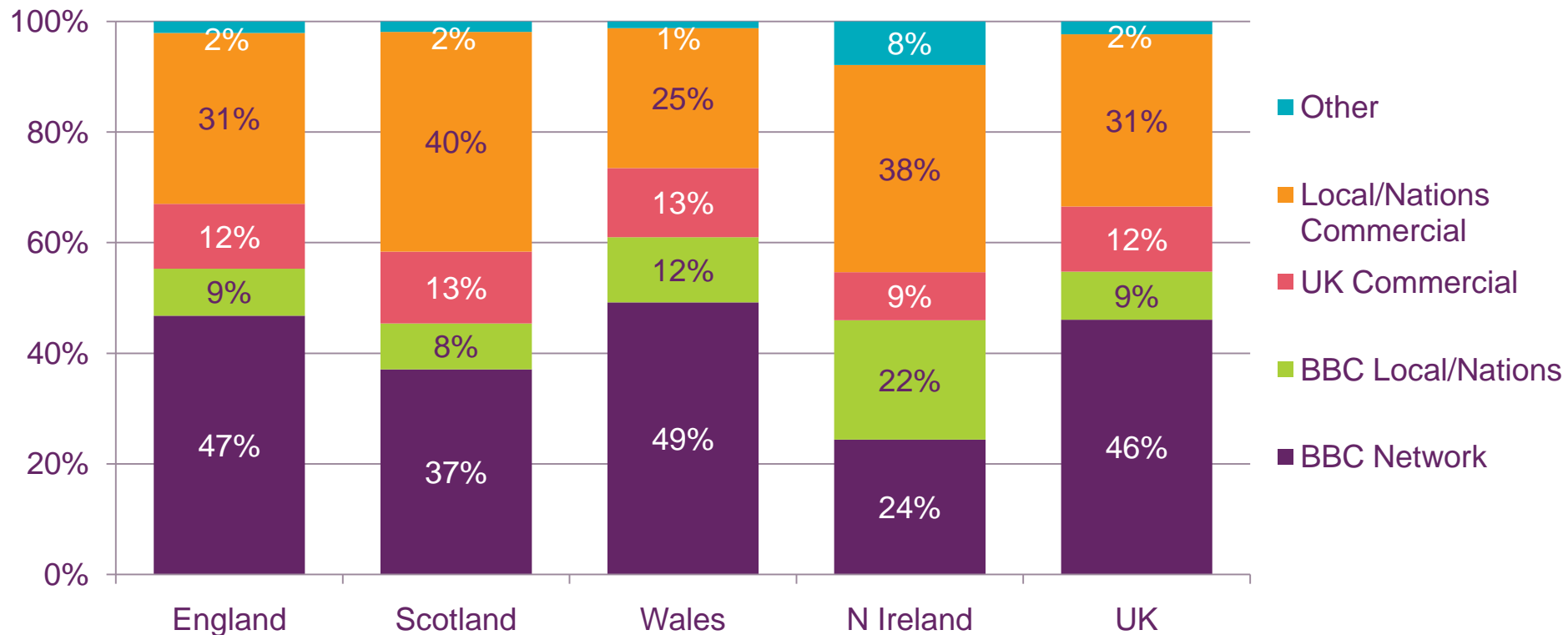
Average weekly reach and listening hours: year to Q4 2011

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	22.5 hours	21.4 hours	23.2 hours	22.0 hours	22.5 hours
Reach	91.1%	87.3%	93.2%	90.1%	91%

Source: RAJAR, All adults (15+), year ended Q4 2011. 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: year to Q4 2011

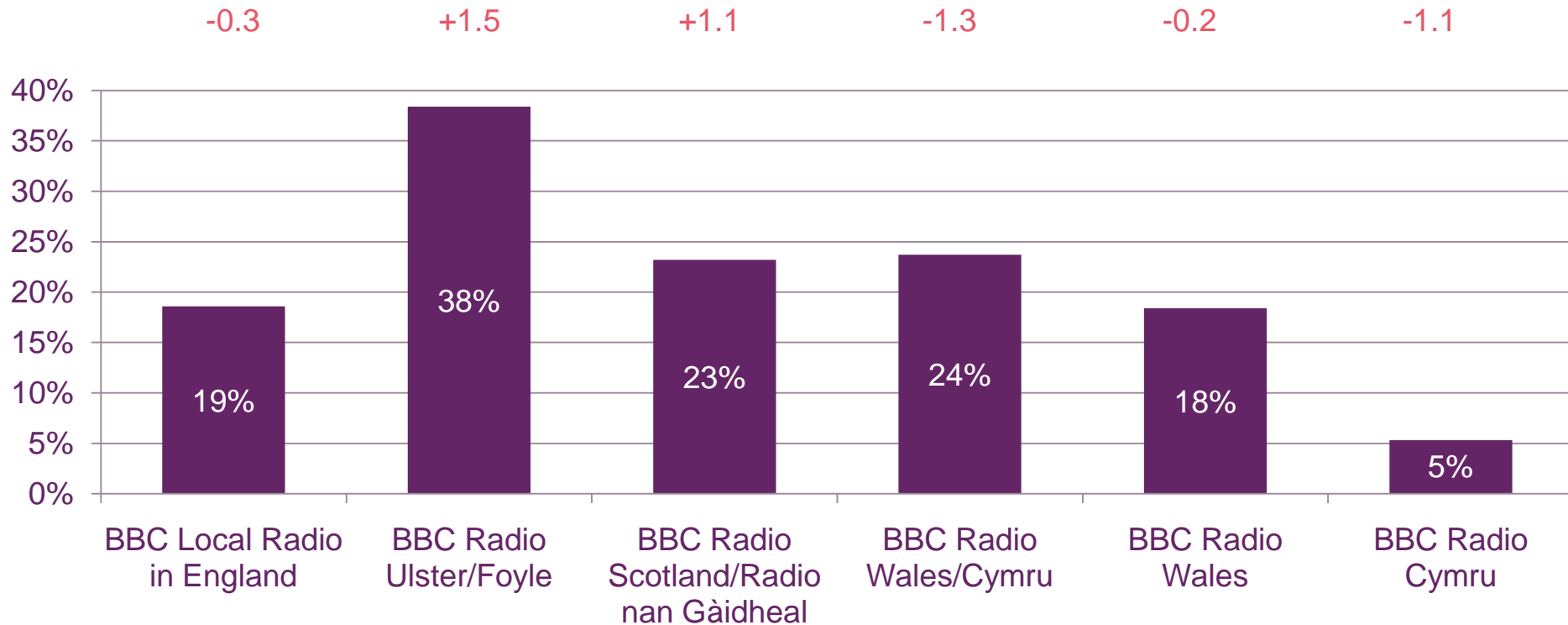
Audience share



Source: RAJAR, All adults (15+), year ended Q4 2011 Note: BBC Local/Nations includes: BBC Radio Scotland & Radio nan Gàidheal; BBC Radio Wales & Radio Cymru, and BBC Radio Ulster & Radio Foyle

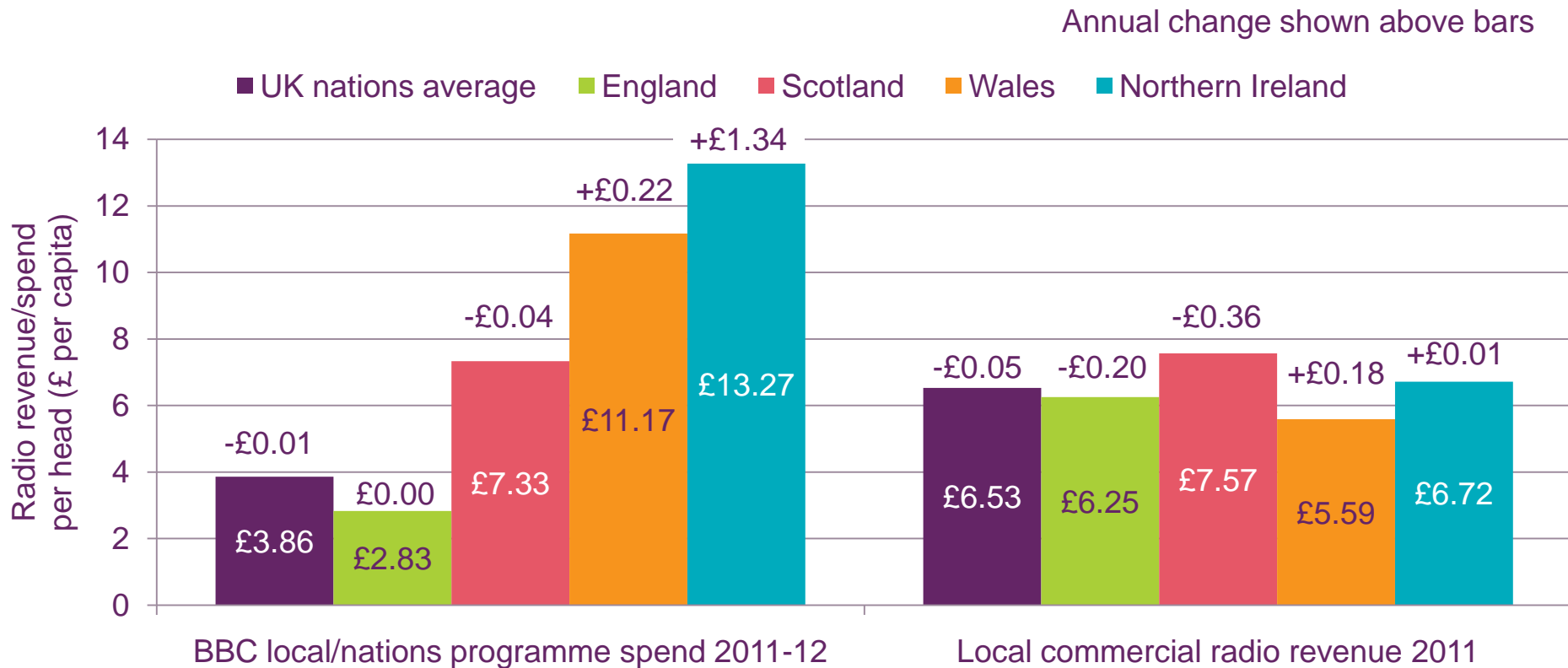
Weekly reach for national / local BBC services

Change on previous year (percentage points)



Source: RAJAR, All adults (15+), year ended Q4 2011 Note: BBC Local/Nations includes: BBC Radio Scotland & Radio nan Gàidheal; BBC Radio Wales & Radio Cymru, and BBC Radio Ulster & Radio Foyle

Local/nations radio spend and revenue per head of population 2011



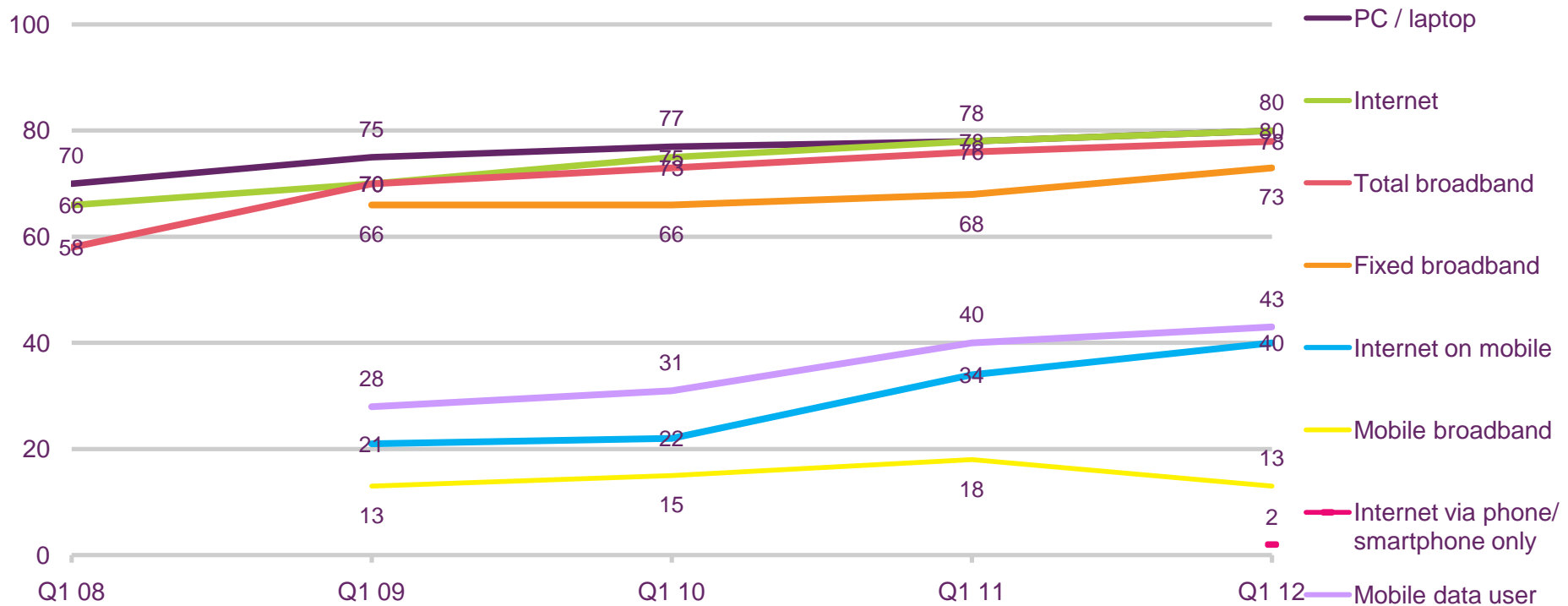
Source: Broadcasters

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.

Internet and web-based content

Household PC and internet take-up, England 2008-2012

Proportion of households (%)



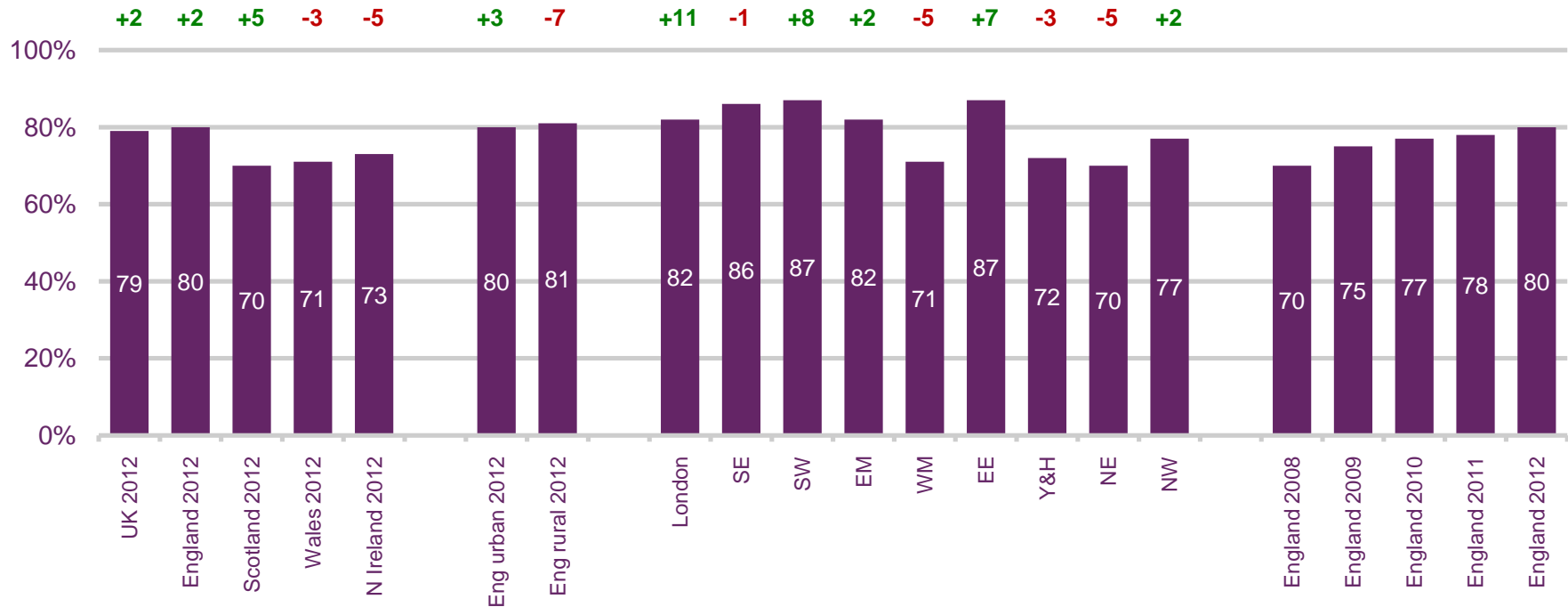
Source: Ofcom technology tracker

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

Residential PC ownership

PC ownership

Figure above bar shows % point change in PC ownership from Q1 2011

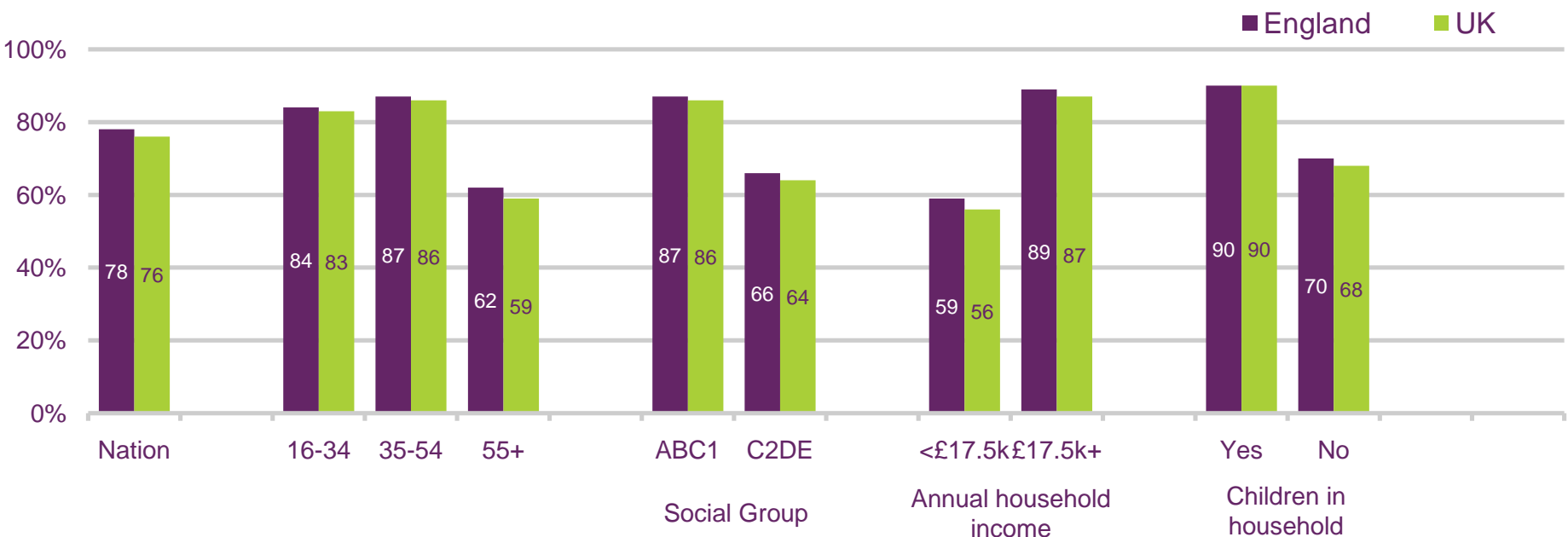


QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Consumer broadband take-up in England (by demographic)

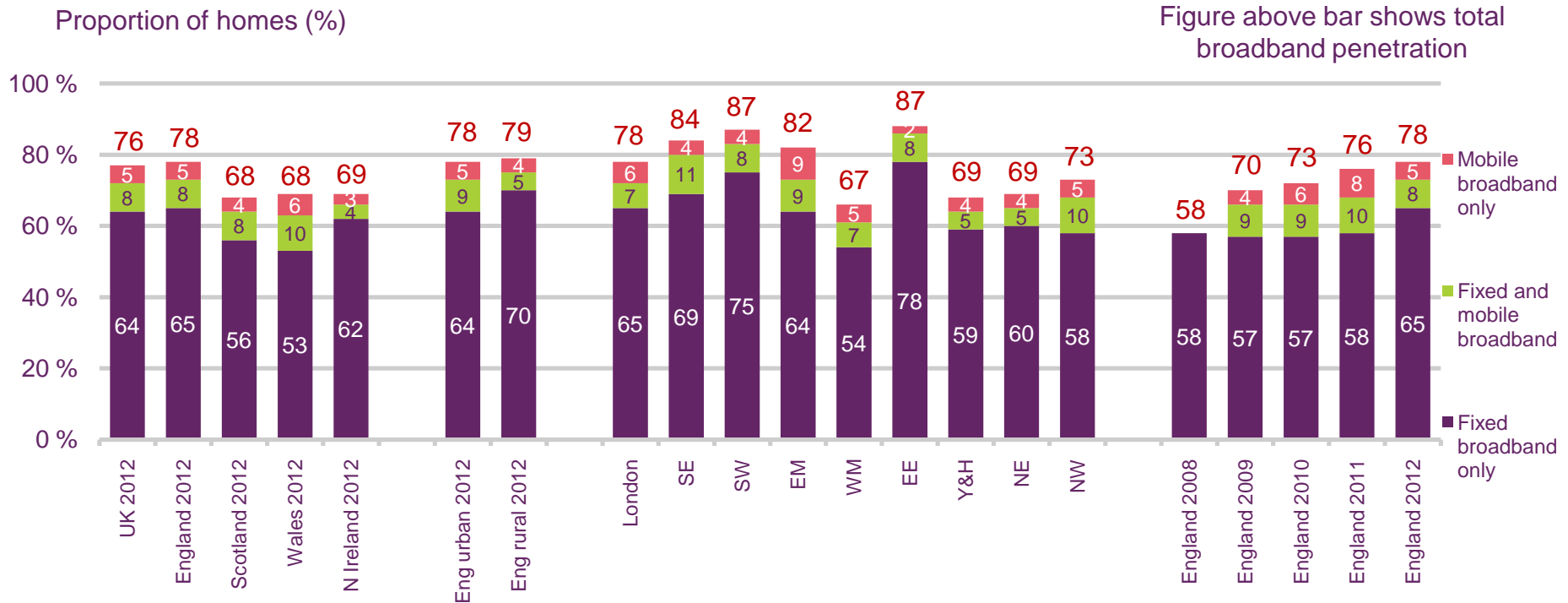


Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n =2251 England, 623 16-34s, 788 35-54s, 840 55+, 1185 ABC1, 1064 C2DE, 592 <£17.5k income, 686 £17.5k+, 839 children in home, 1412 no children in home)

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

Consumer broadband (by connection type)

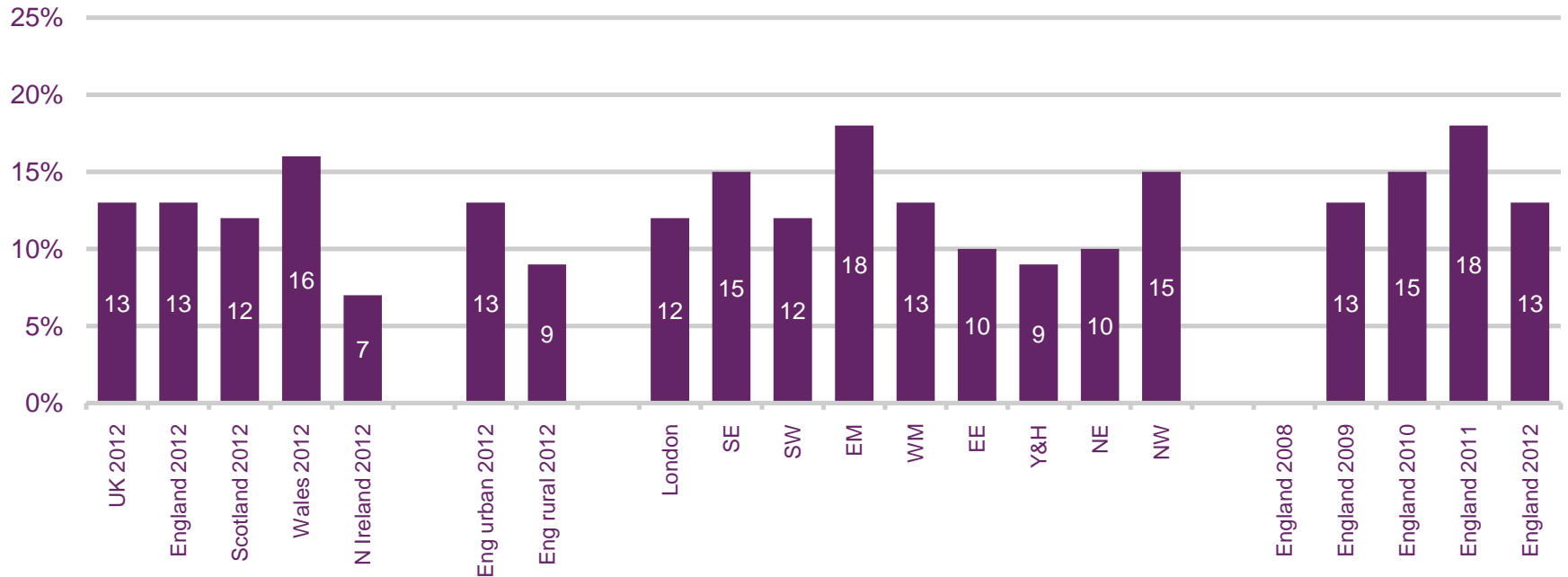


QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Take-up of mobile broadband

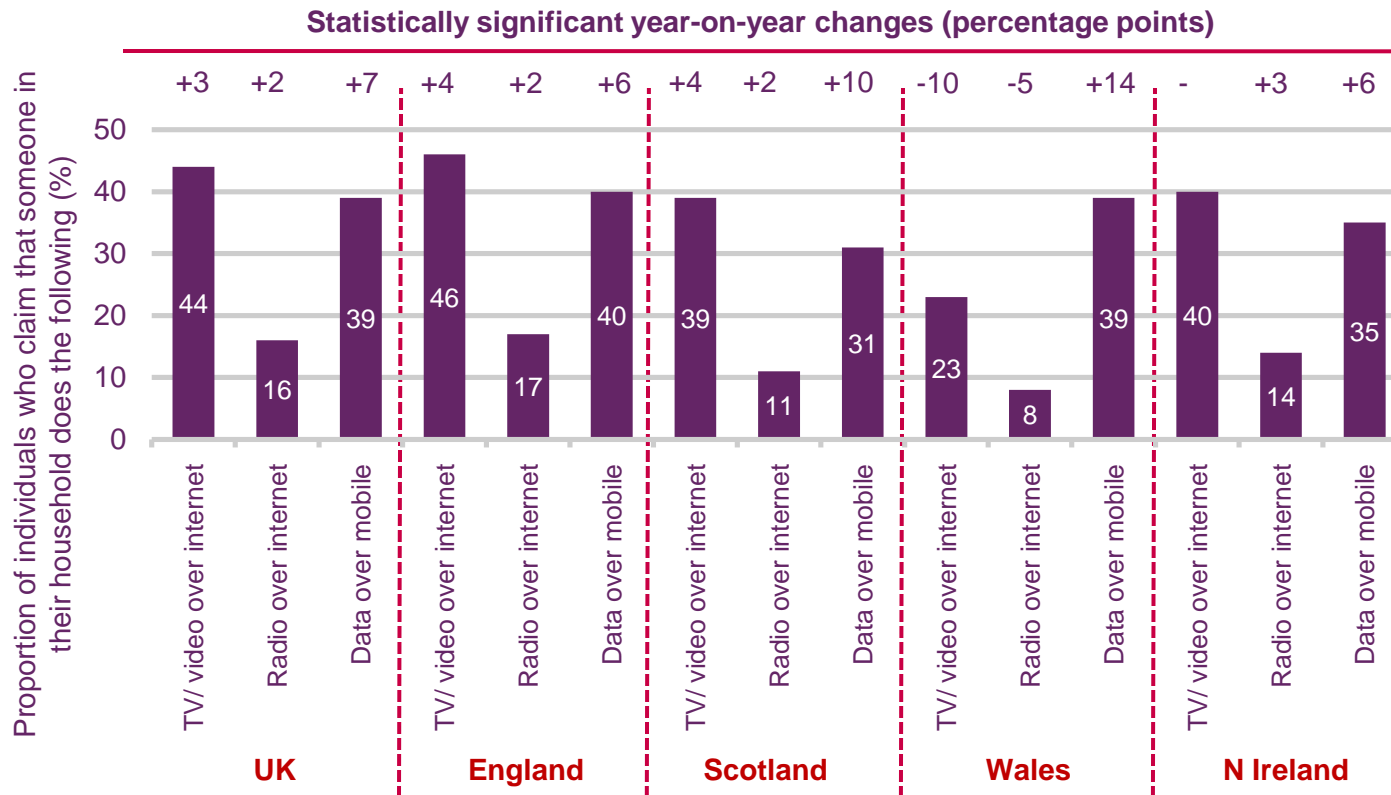


QE9. Which of these methods does your household use to connect to the Internet at home? (NB 2008 survey did not cover mobile broadband)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Consumers' use of converging platforms, 2012



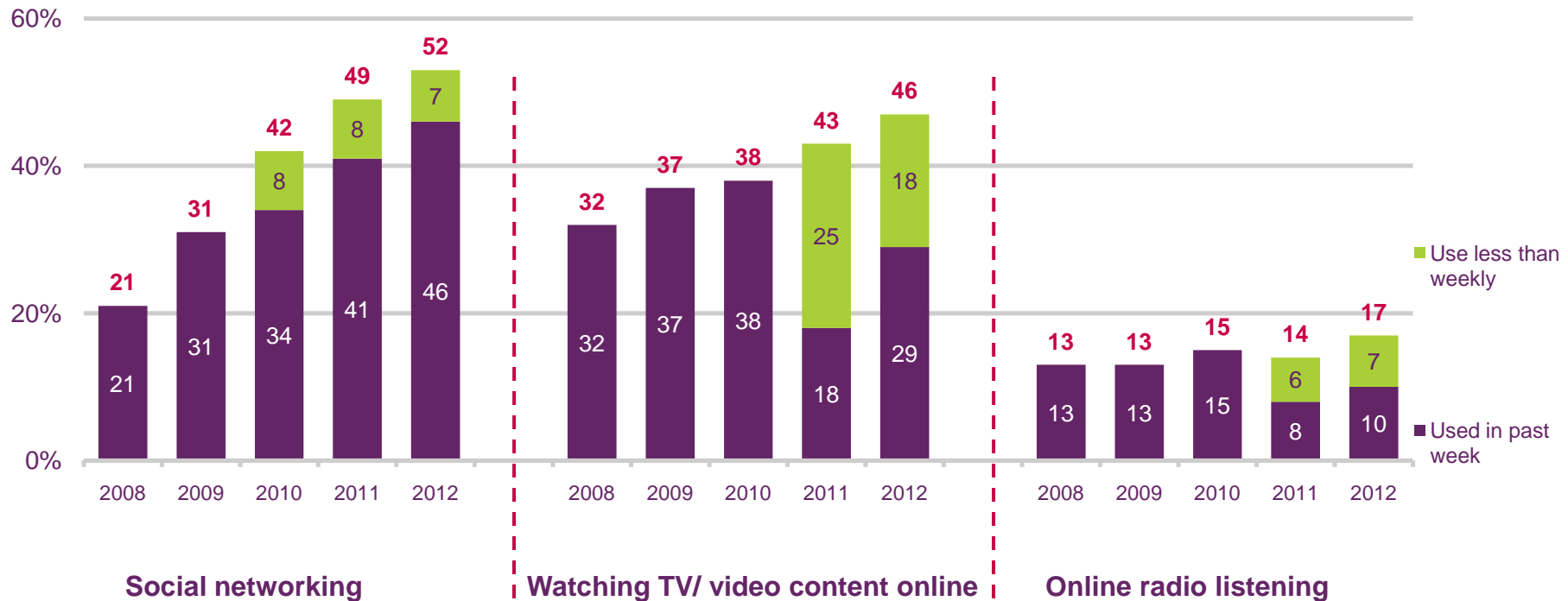
Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

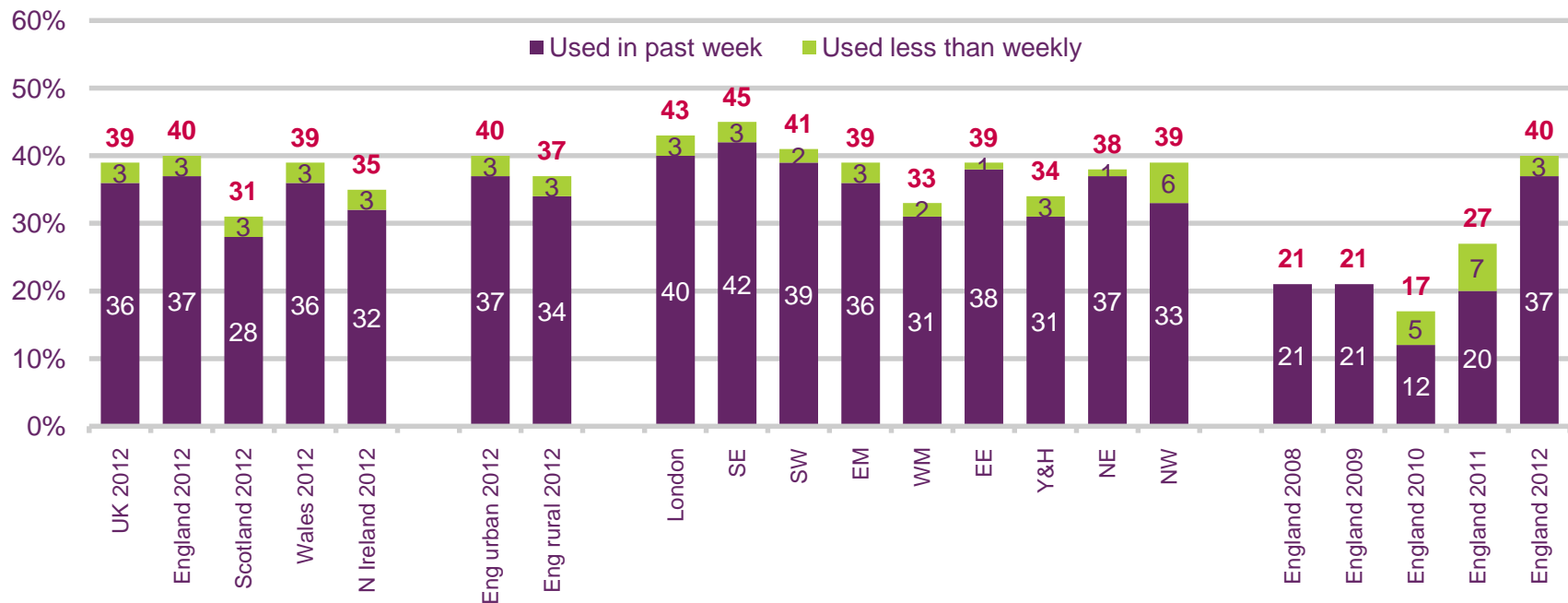
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging

Use of the internet in England over time



NB includes use via any device i.e. PC/ laptop or mobile phone

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

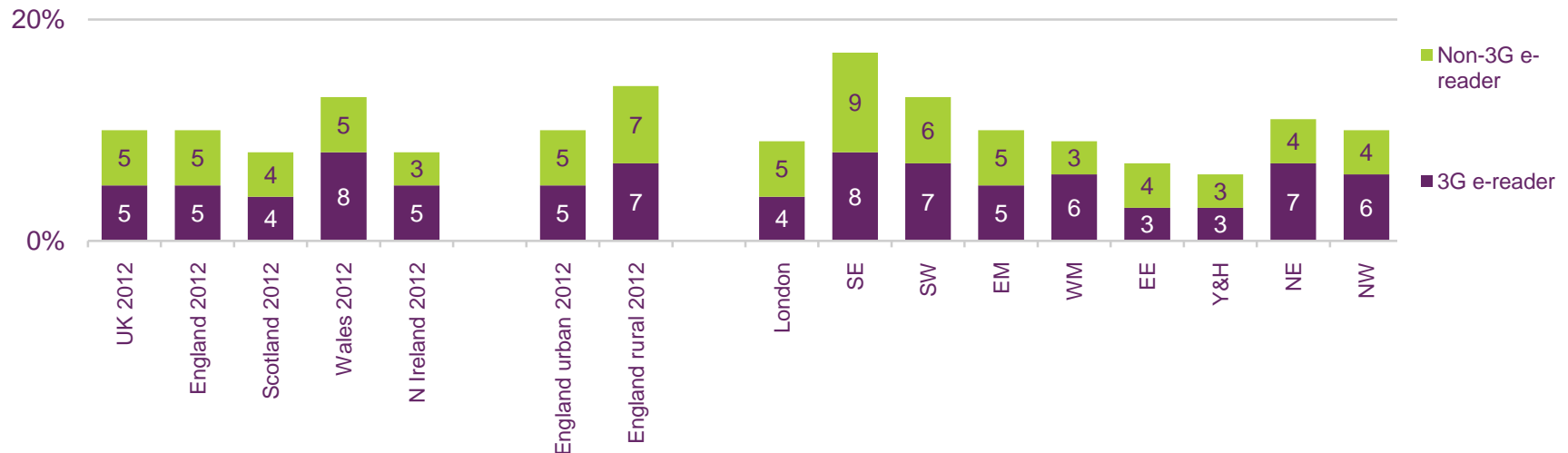


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Take-up of e-readers

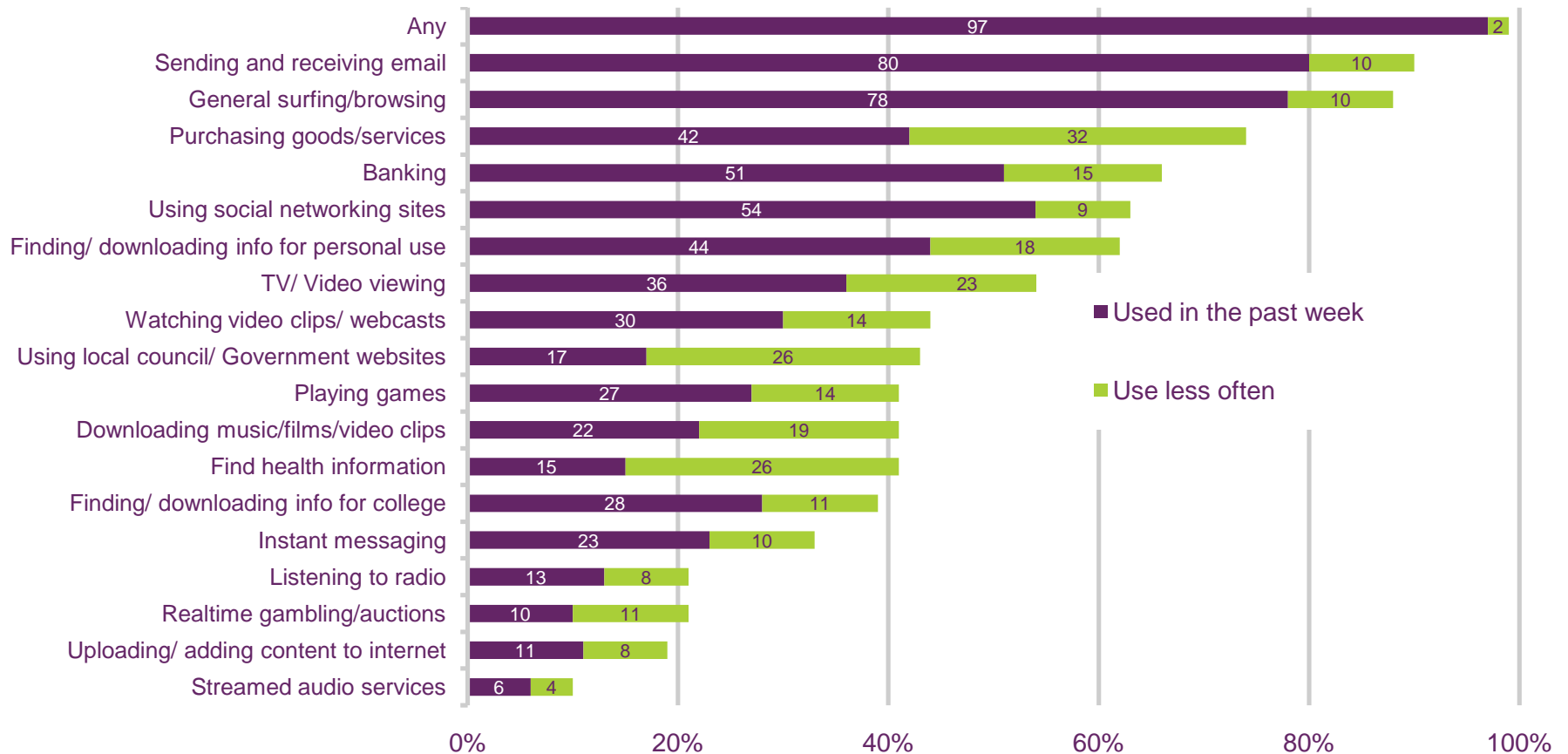


QB1. Which of the following do you ,or does anyone in your household, have in your home at the moment ?/ QB2. And do you personally use.../ QB6. Does your household's e-reader have built-in 3G access to a mobile network?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West)

Use of online applications among broadband users

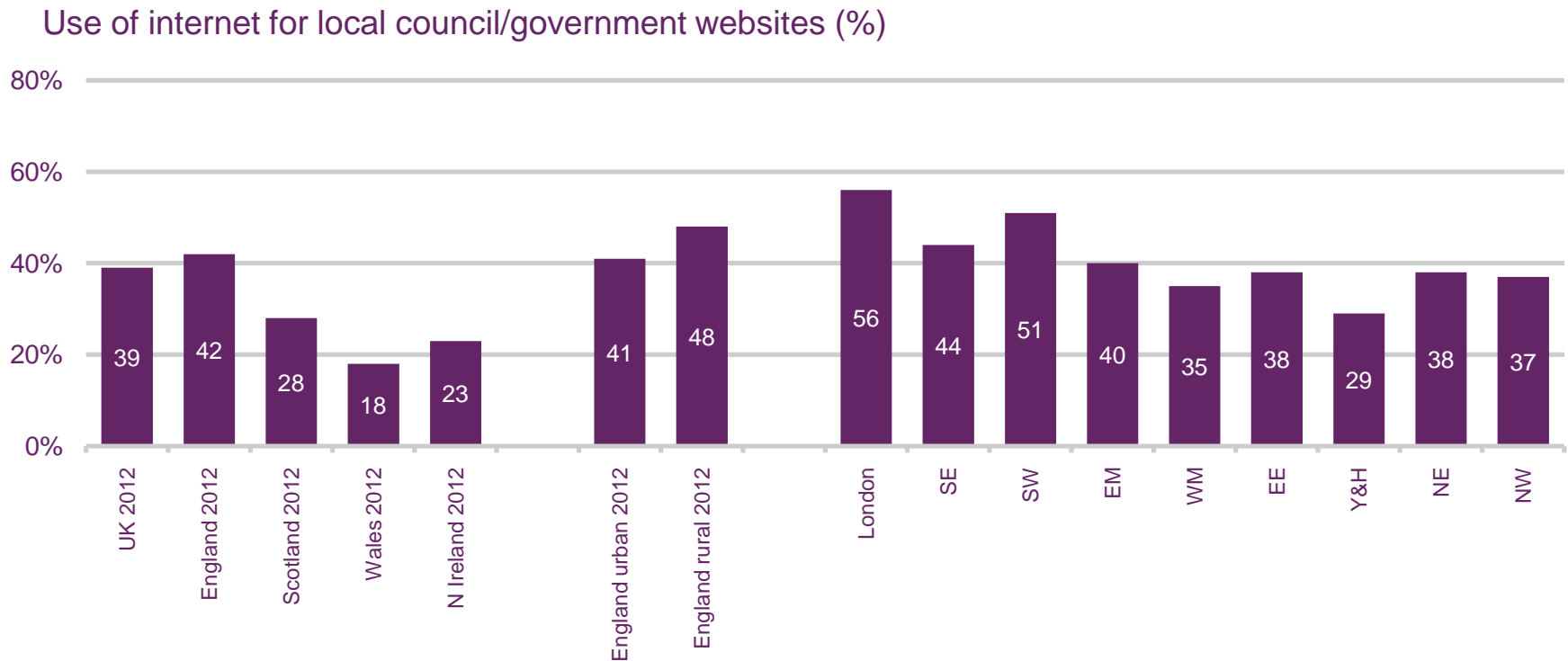


QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with a broadband connection at home (n= 1684 England 2012)

Use of the internet to access local council/government websites



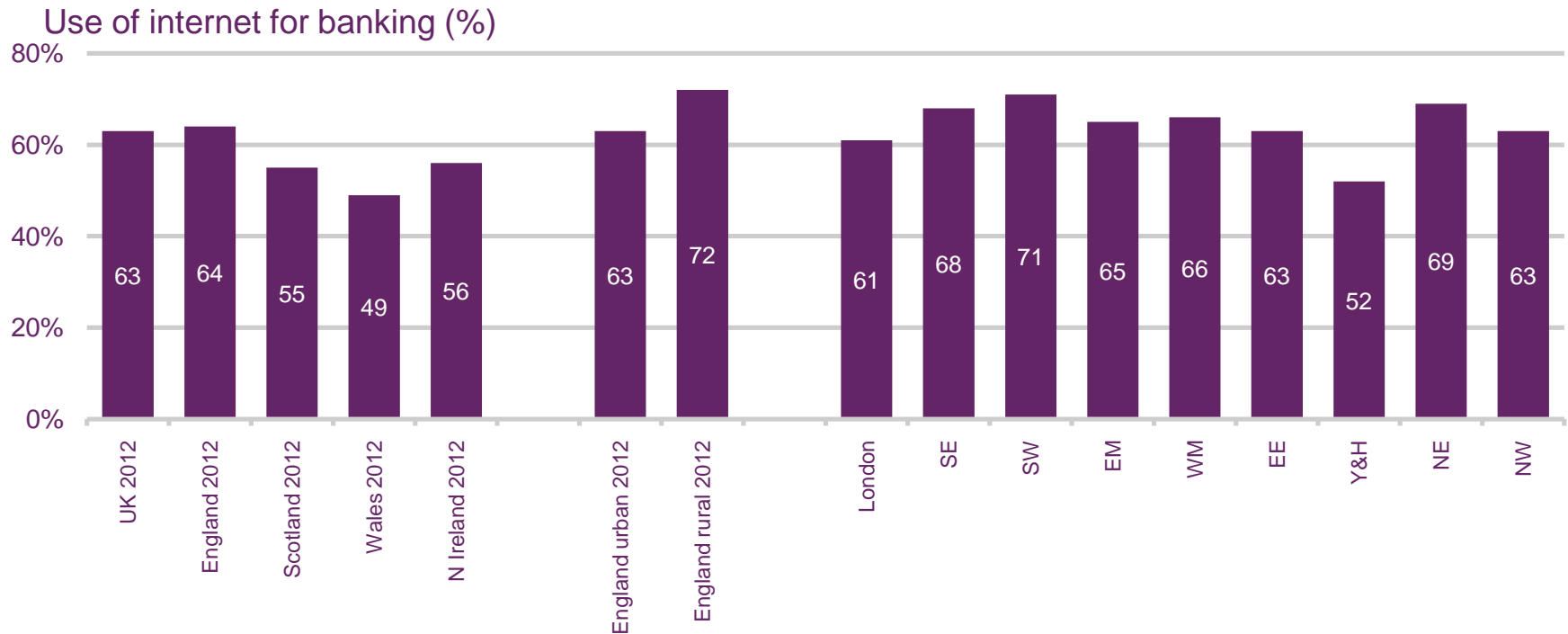
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 1734 England, 361 Scotland, 363 Wales, 365 Northern Ireland, 1508 England urban, 226 England rural, 181 London, 207 South East, 218 South West, 214 East Midlands, 163 West Midlands, 216 East of England, 181 Yorkshire & Humber, 170 North East, 184 North West)

Telecoms and networks

Use of the internet to access banking websites



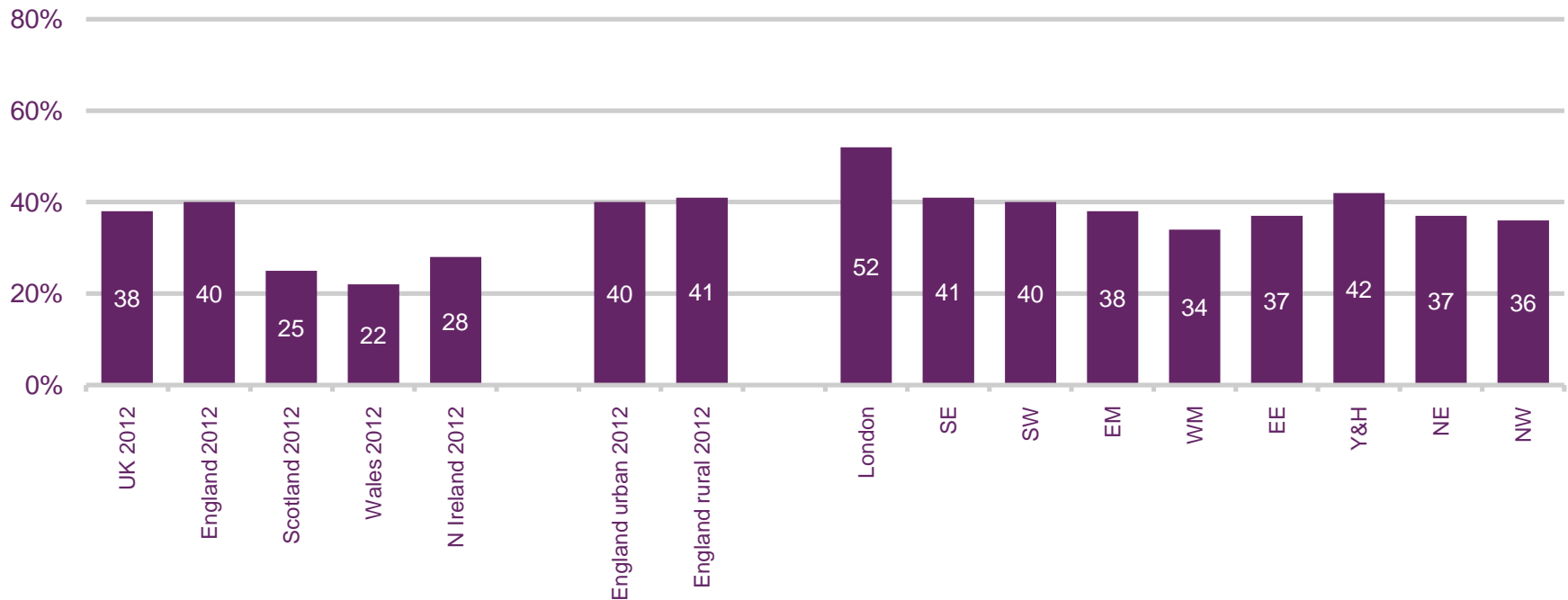
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 1734 England, 361 Scotland, 363 Wales, 365 Northern Ireland, 1508 England urban, 226 England rural, 181 London, 207 South East, 218 South West, 214 East Midlands, 163 West Midlands, 216 East of England, 181 Yorkshire & Humber, 170 North East, 184 North West)

Use of the internet to access information on health-related issues

Use of internet for finding information on health-related issues (%)



QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

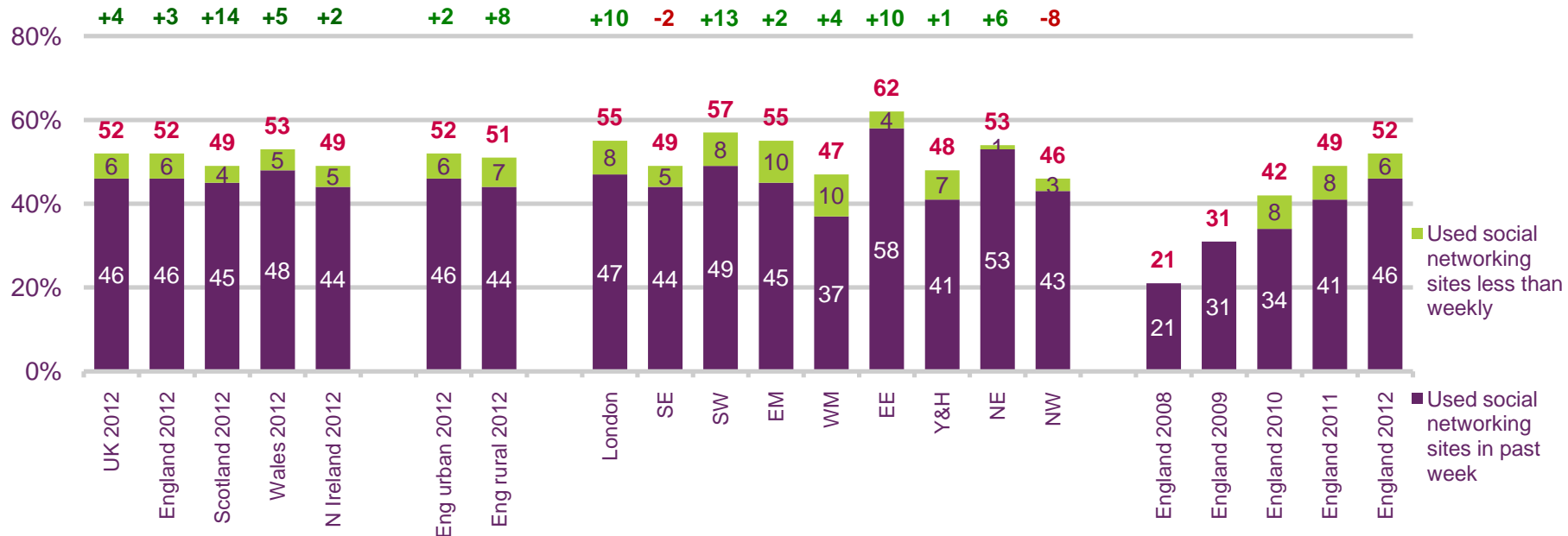
Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 1734 England, 361 Scotland, 363 Wales, 365 Northern Ireland, 1508 England urban, 226 England rural, 181 London, 207 South East, 218 South West, 214 East Midlands, 163 West Midlands, 216 East of England, 181 Yorkshire & Humber, 170 North East, 184 North West)

Use of social networking sites

Use of social networking sites (%)

Figure above bar shows year on year change



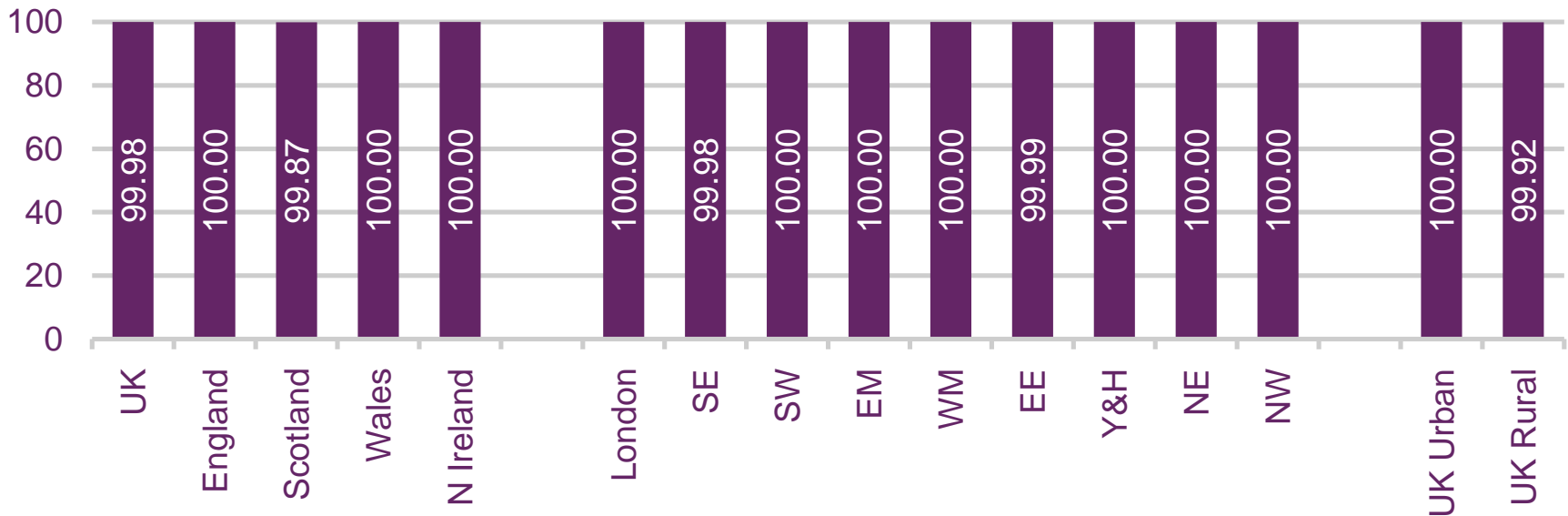
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week?/ QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use. 2008, 2009 and 2010 surveys did not ask about using mobile to visit social networking sites)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Proportion of households connected to an ADSL-enabled BT exchange

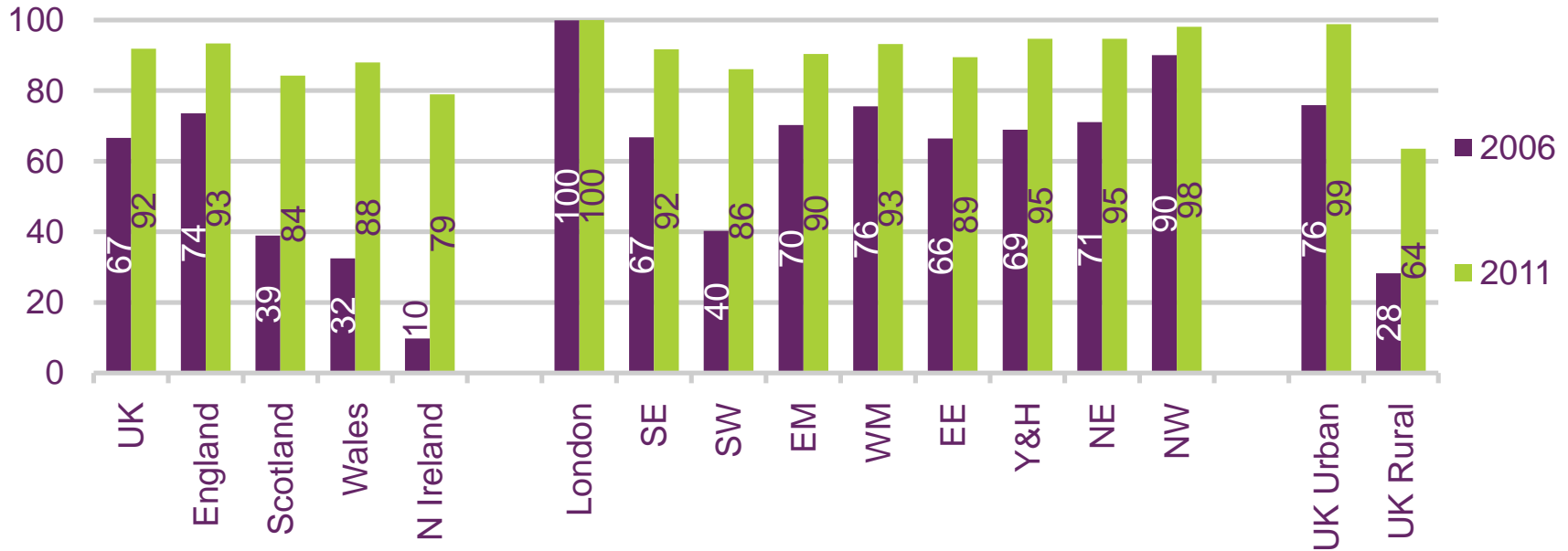
Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

Proportion of households in connected to an unbundled local exchange

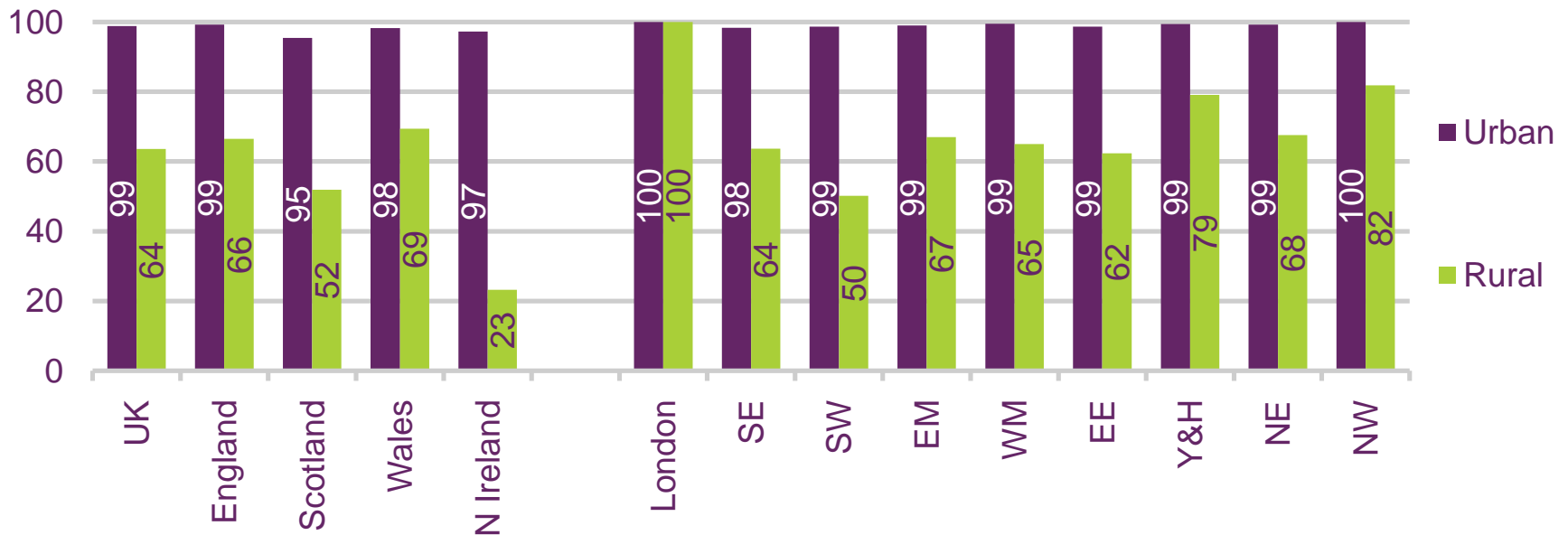
Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

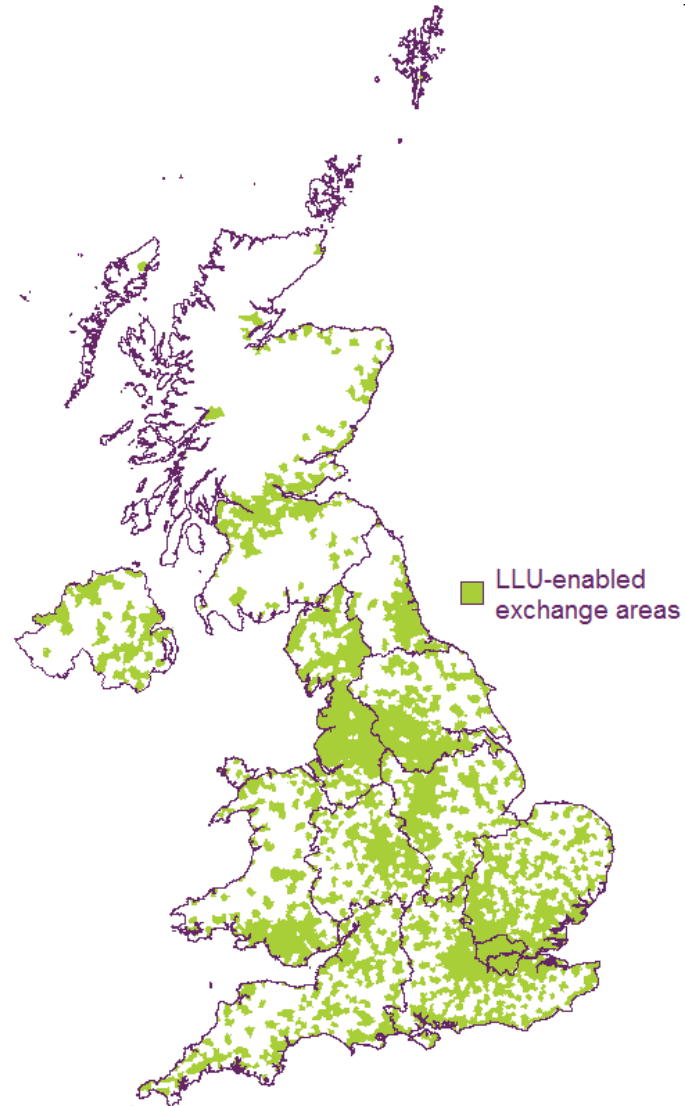
Proportion of households in urban and rural areas connected to an unbundled exchange

Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

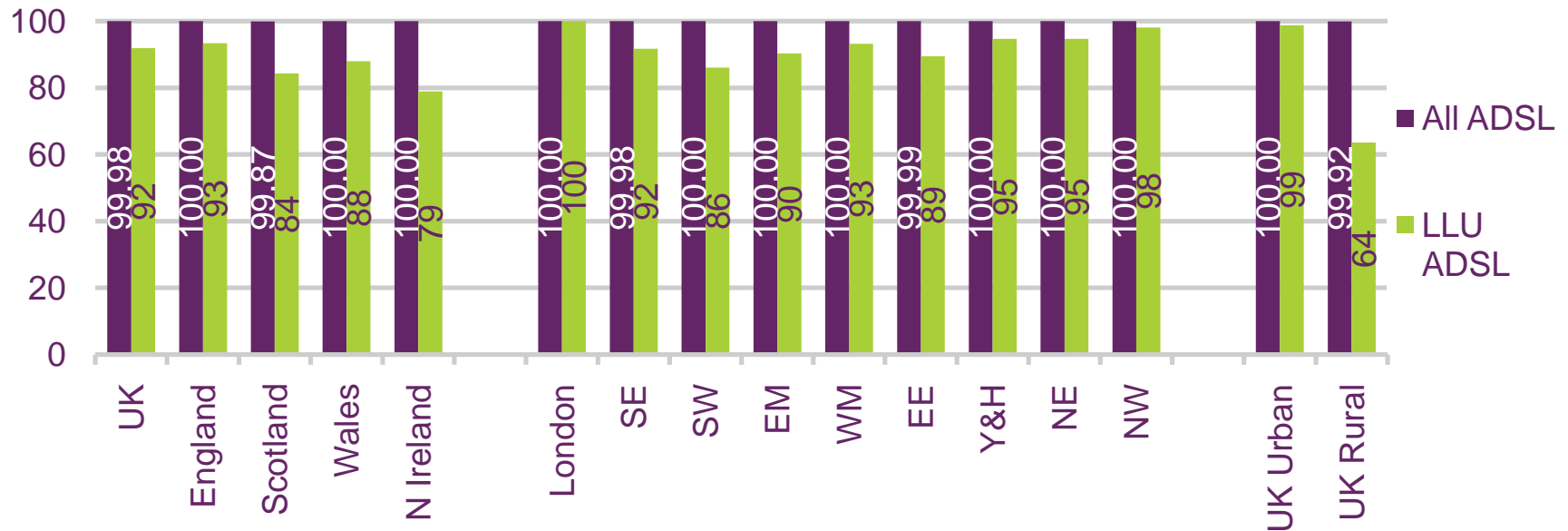
Map showing areas served by unbundled local exchanges



Source: Ofcom / BT, December 2011 data

Proportion of homes connected to ADSL-enabled and unbundled exchanges

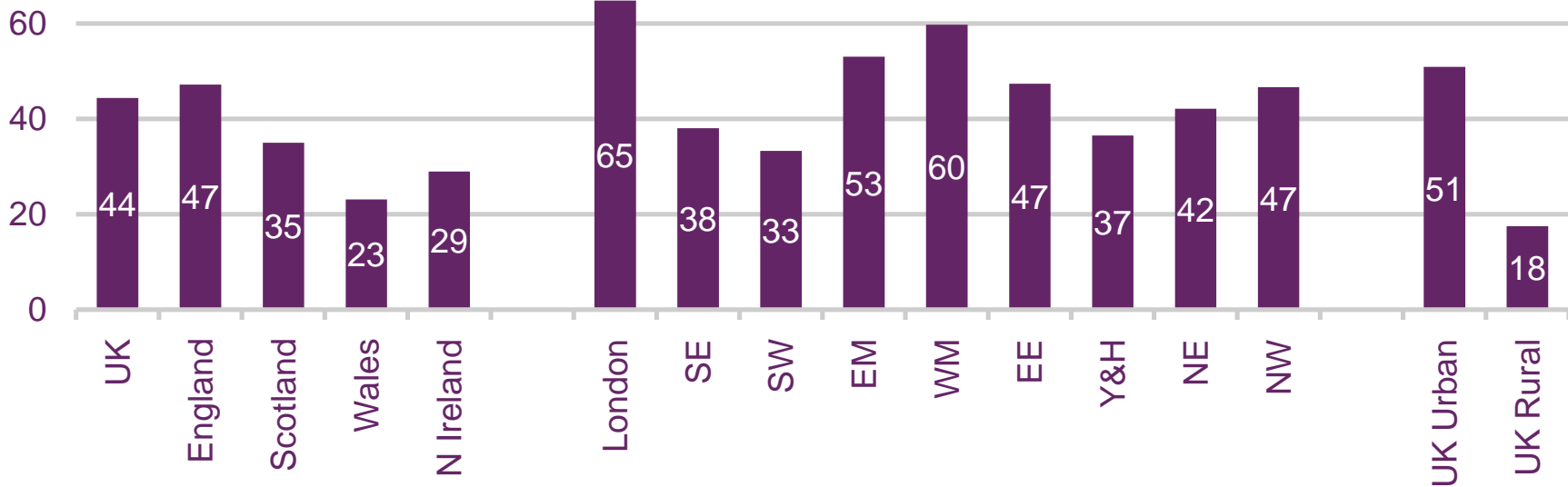
Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

Proportion of households passed by Virgin Media's cable broadband network

Proportion of households (per cent)

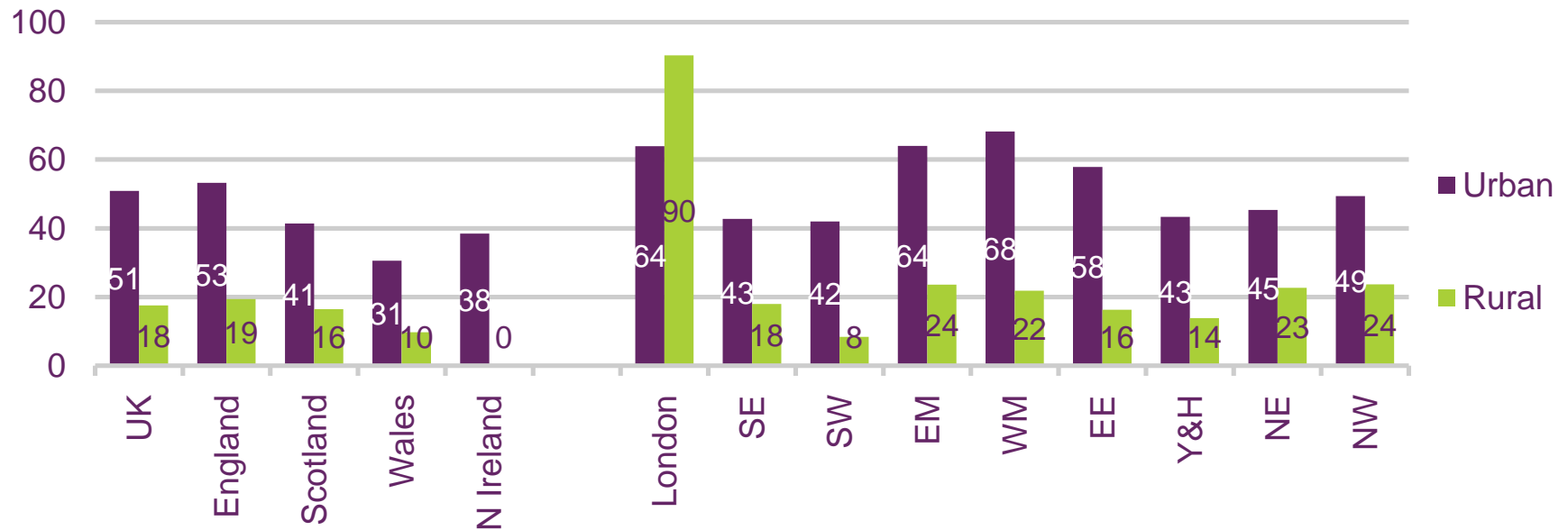


Source: Ofcom / Virgin Media, May 2012 data

Note: excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV services

Proportion of households in urban and rural areas passed by Virgin Media's cable broadband network

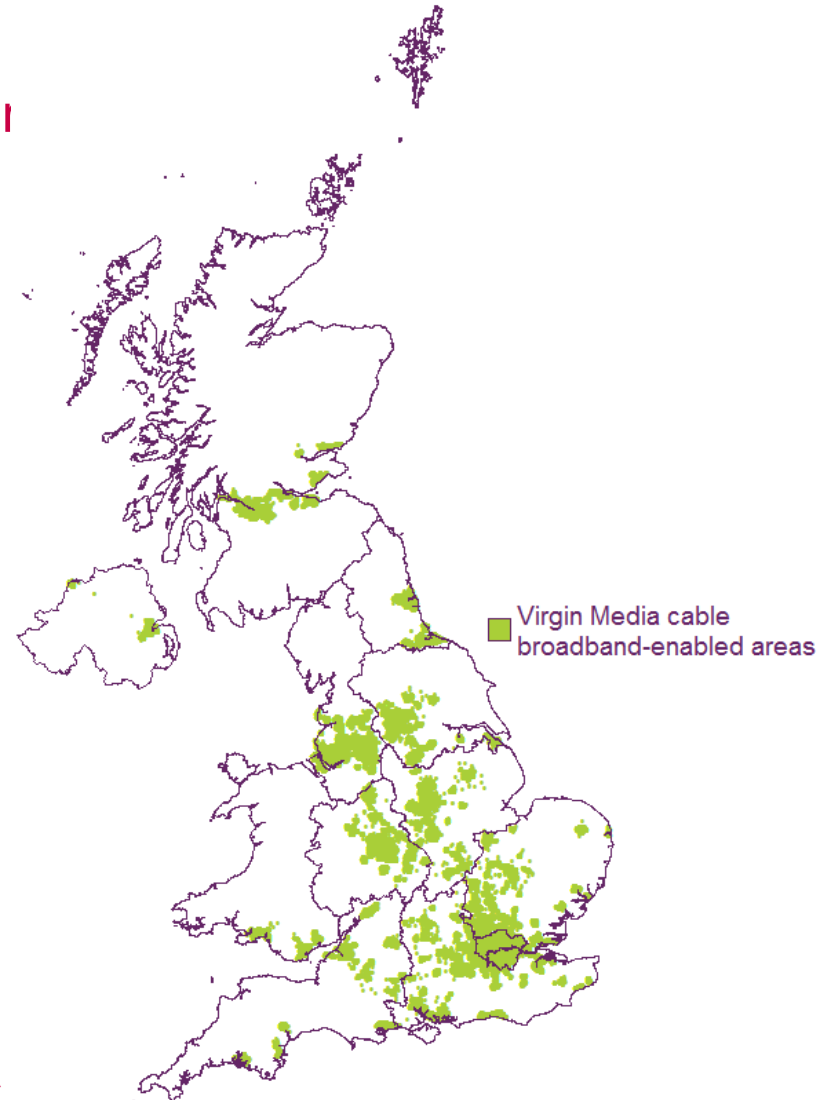
Proportion of households (per cent)



Source: Ofcom / Virgin Media, May 2012 data

Note: London is an anomaly, as there are large areas of Central London which the cable franchisees have not targeted them as they have a low residential population, while areas of Greater London classified as 'rural' typically have a much higher population density than other rural areas of the UK).

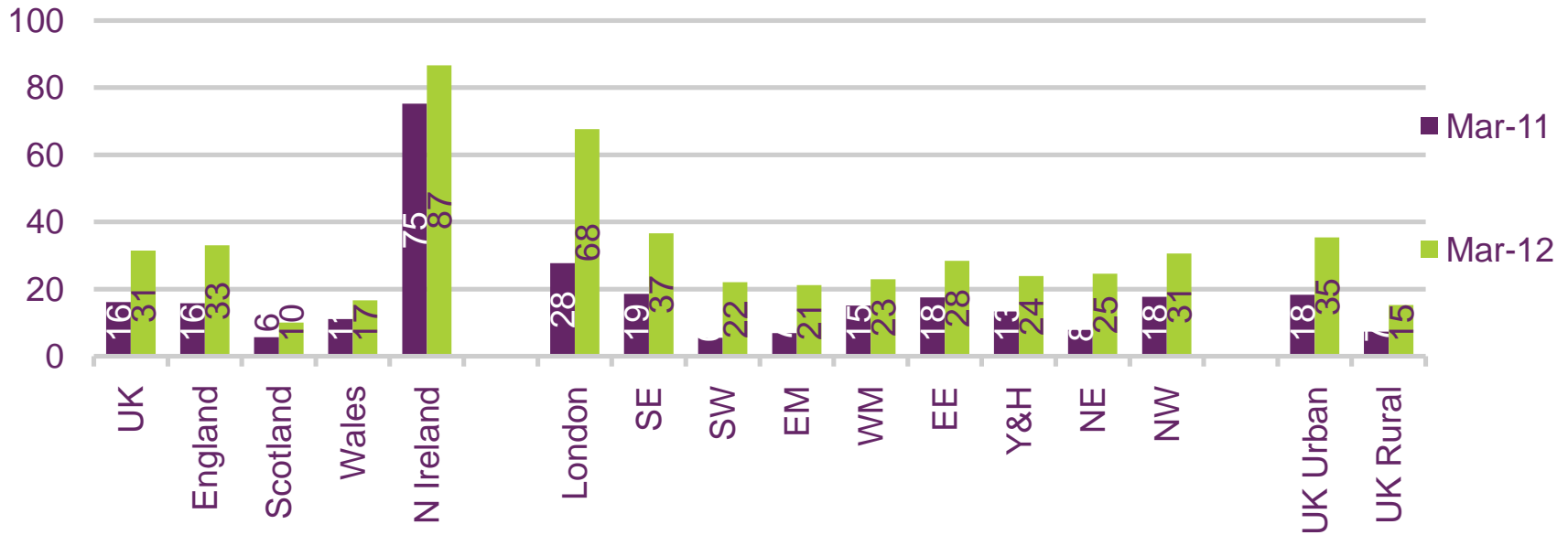
Map of the availability of Virgin Media's cable broadband network



Source: Ofcom / Virgin Media, May 2012 data

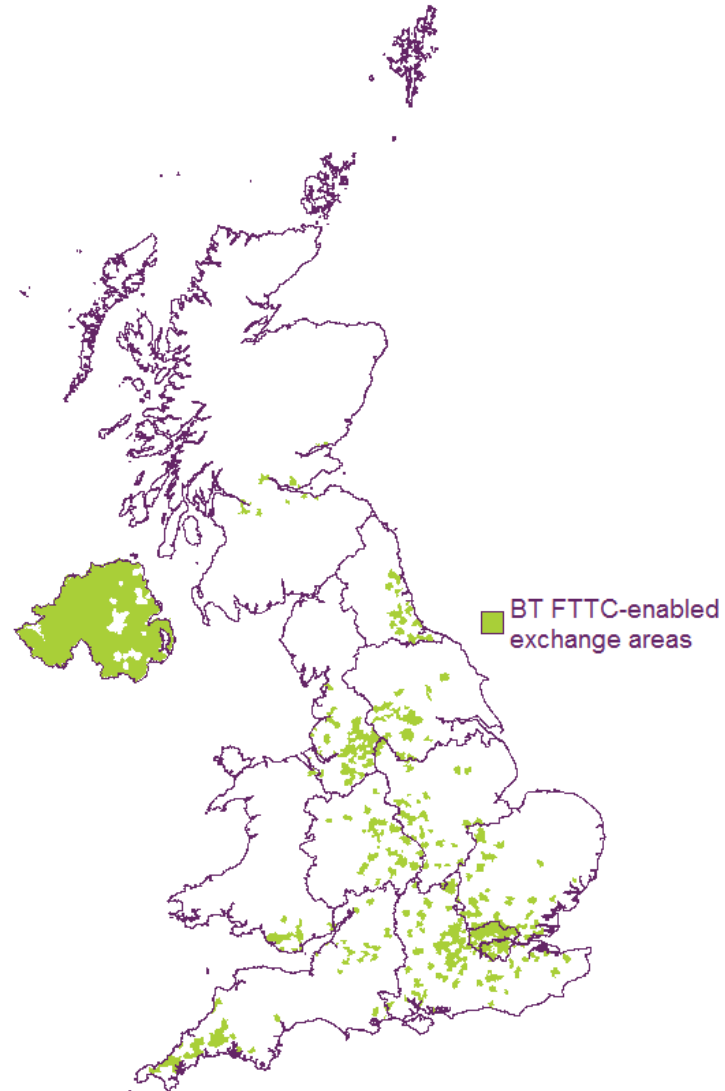
Estimated proportion of households able to receive FTTC services

Proportion of households (per cent)



Source: Ofcom / BT

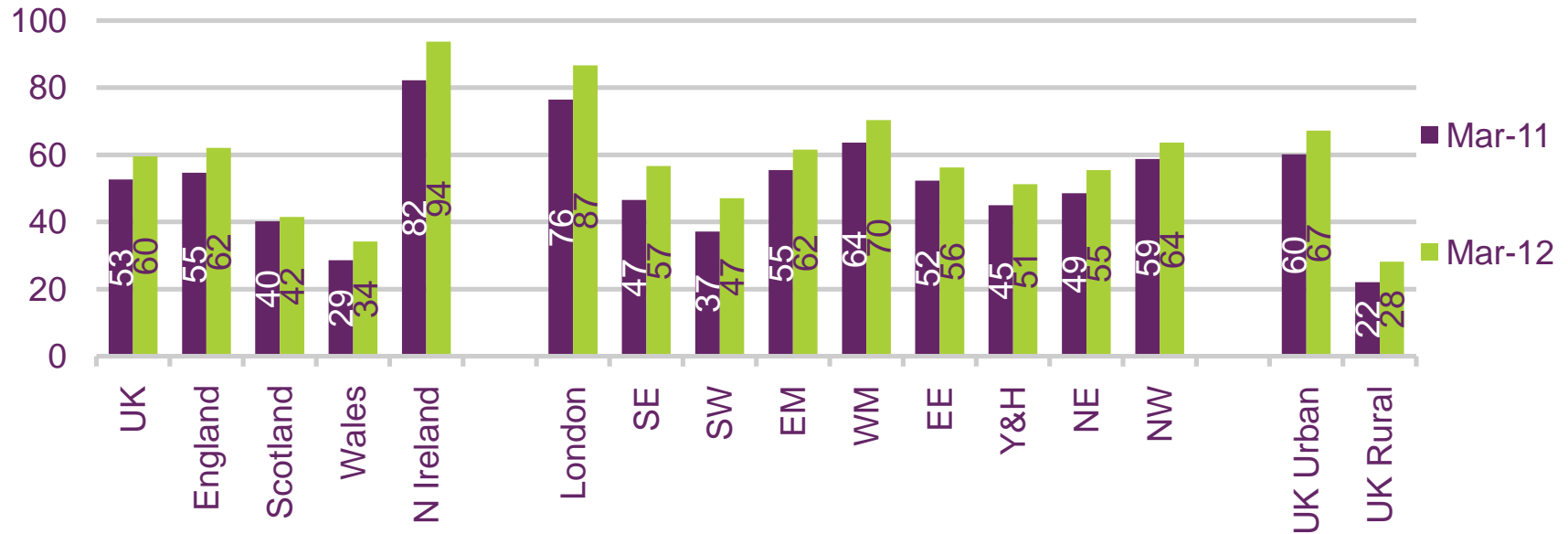
Map of FTTC-enabled BT exchange areas



Source: Ofcom / BT, March 2012 data

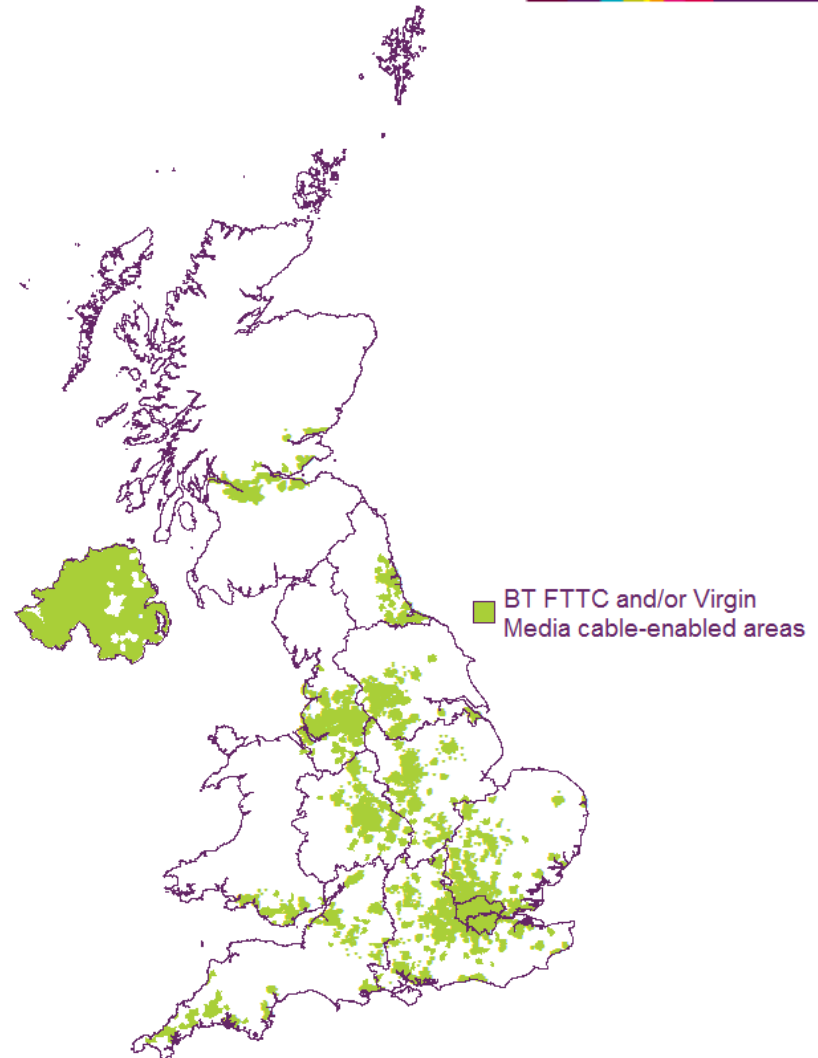
Estimated proportion of households able to receive superfast broadband services

Proportion of households (per cent)



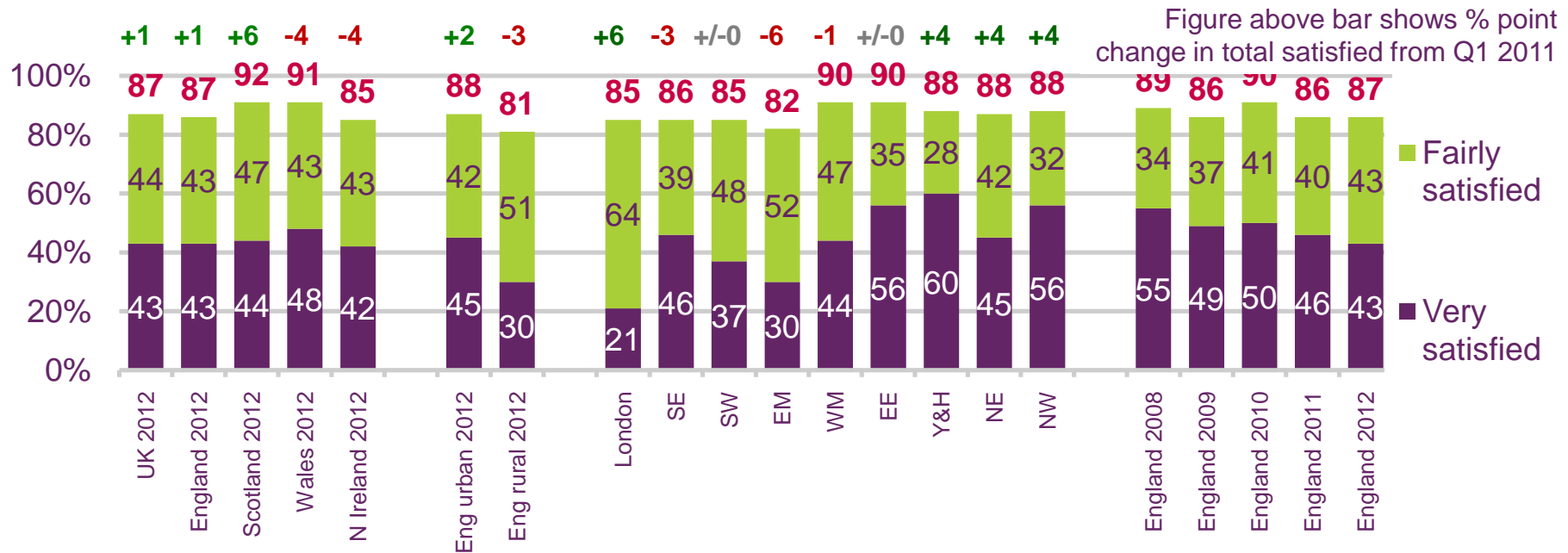
Source: Ofcom / BT / Virgin Media

Map of super-fast broadband availability



Source: Ofcom / BT / Virgin Media, March and May 2012 data

Overall satisfaction with fixed broadband service



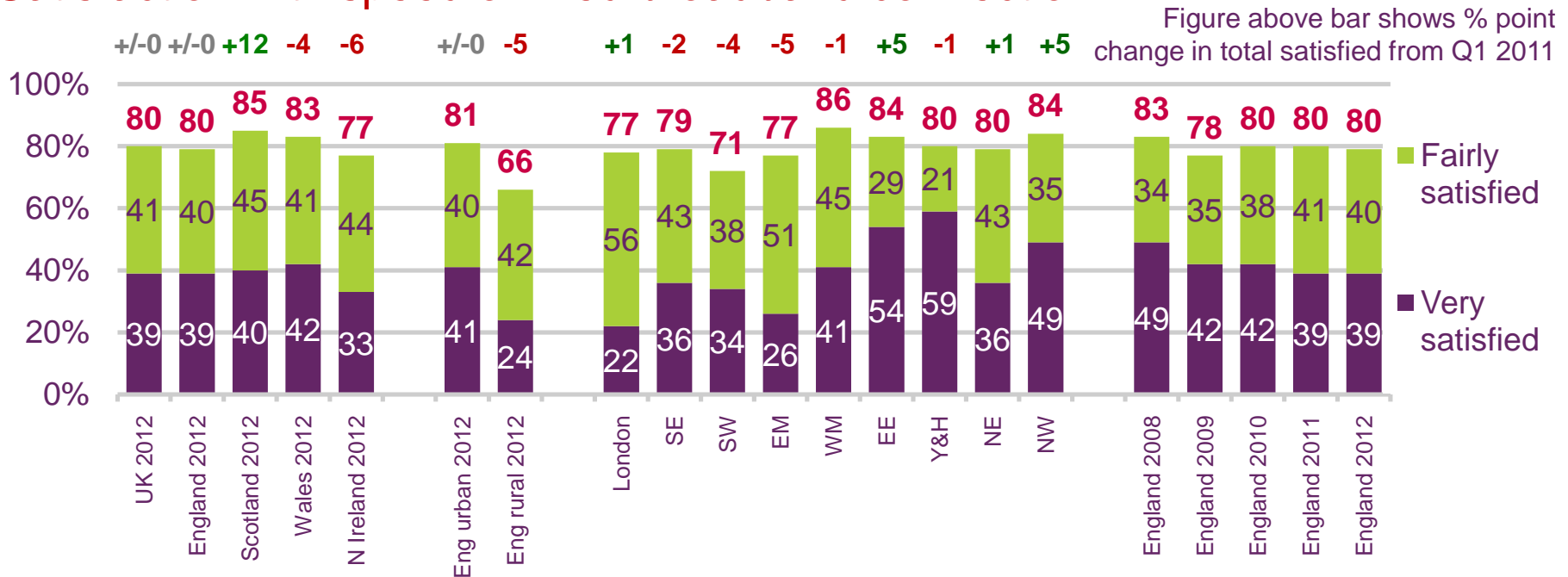
QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2556 UK, 1577 England, 330 Scotland, 318 Wales, 331 Northern Ireland, 1365 England urban, 212 England rural, 166 London, 190 South East, 205 South West, 187 East Midlands, 143 West Midlands, 211 East of England, 156 Yorkshire & Humber, 156 North East, 163 North West, 1907 England 2008, 2048 England 2009, 3559 England 2010, 1311 England 2011, 1577 England 2012)

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

Satisfaction with speed of fixed broadband connection



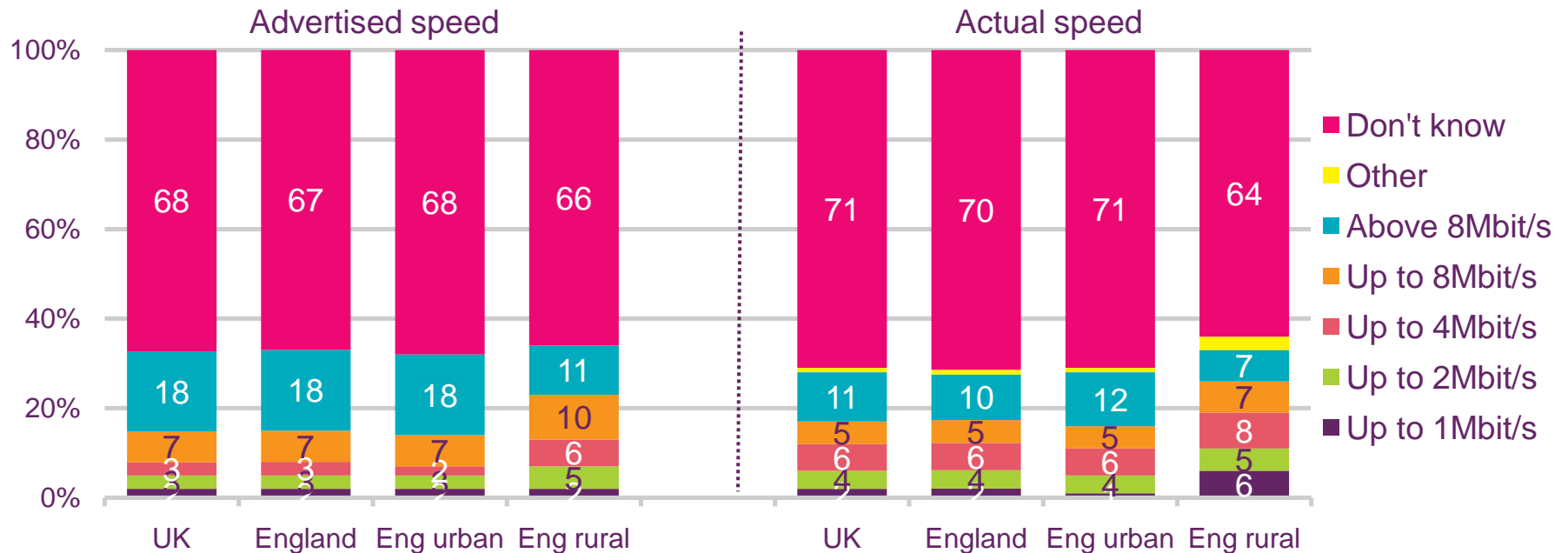
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2556 UK, 1577 England, 330 Scotland, 318 Wales, 331 Northern Ireland, 1365 England urban, 212 England rural, 166 London, 190 South East, 205 South West, 187 East Midlands, 143 West Midlands, 211 East of England, 156 Yorkshire & Humber, 156 North East, 163 North West, 1907 England 2008, 2048 England 2009, 3559 England 2010, 1311 England 2011, 1577 England 2012)

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



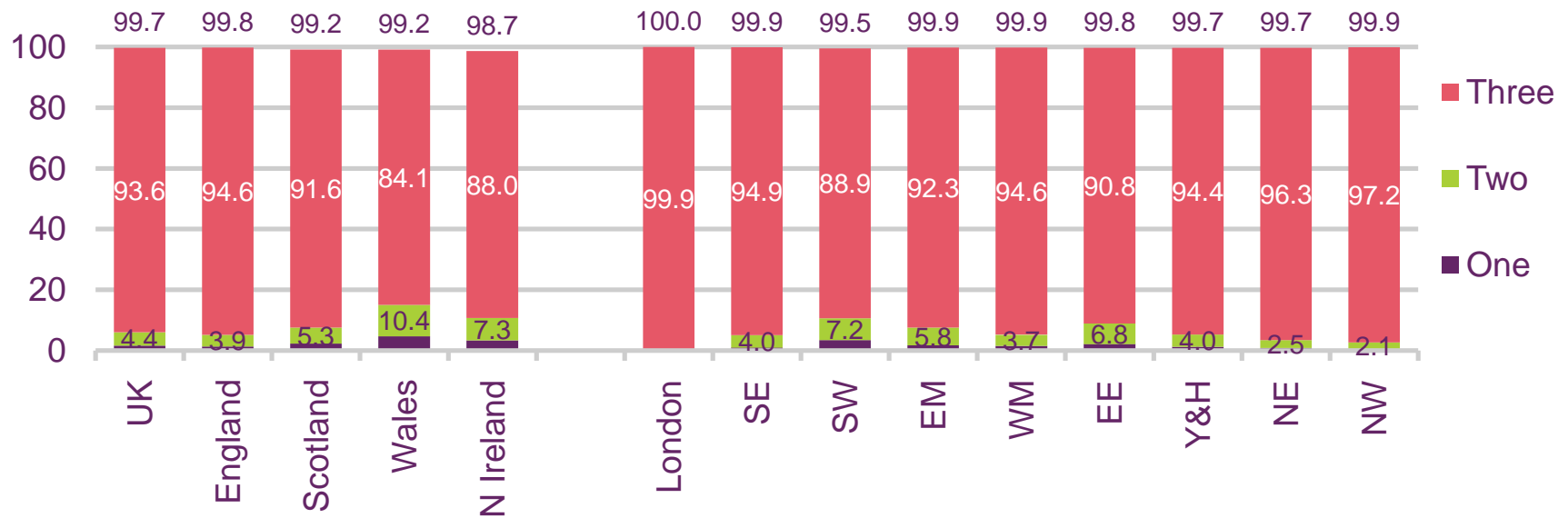
QE17. What was the advertised speed of your main home internet connection when you took up your service?/ QE16. What is the actual speed of your main home internet connection?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with broadband connection at home (n = 2726 UK, 1684 England, 1462 England urban, 222 England rural)

Premises covered by 2G mobile, by number of operators

Proportion of premises (per cent)

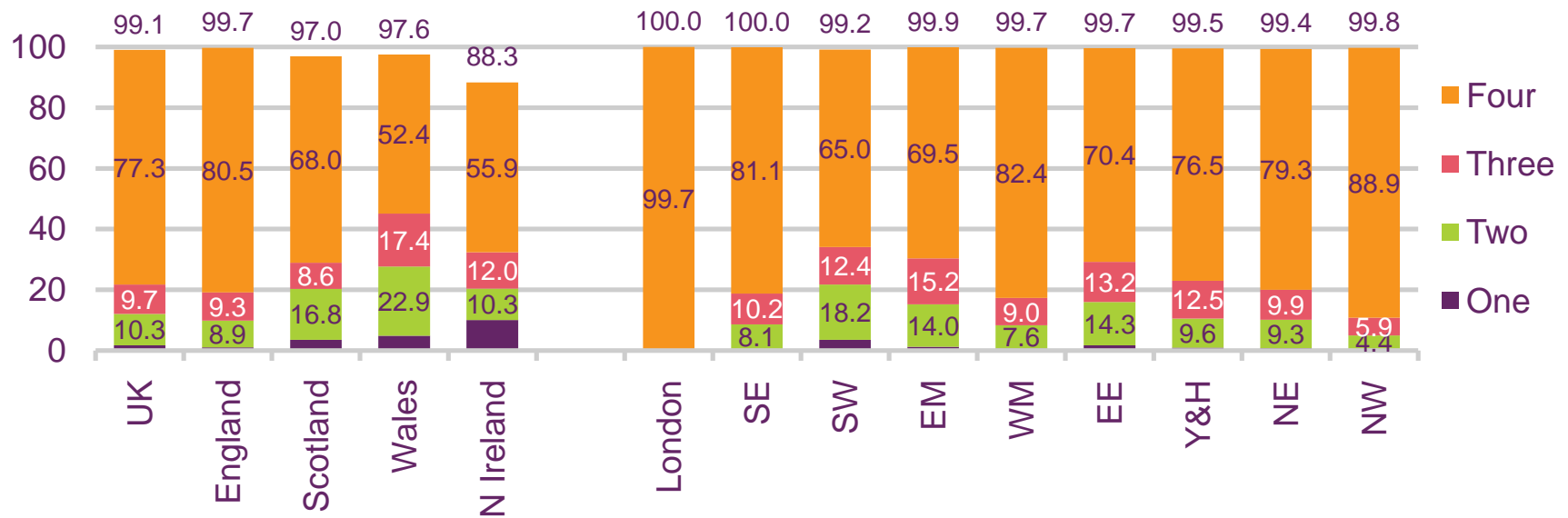


Source: Ofcom based on operator data.

Note: Coverage is based on 200m square pixels covering the UK using an enhanced methodology. Therefore data is not comparable to that published in the 2011 Communications Market Report.

Premises covered by 3G mobile, by number of operators

Proportion of premises (per cent)

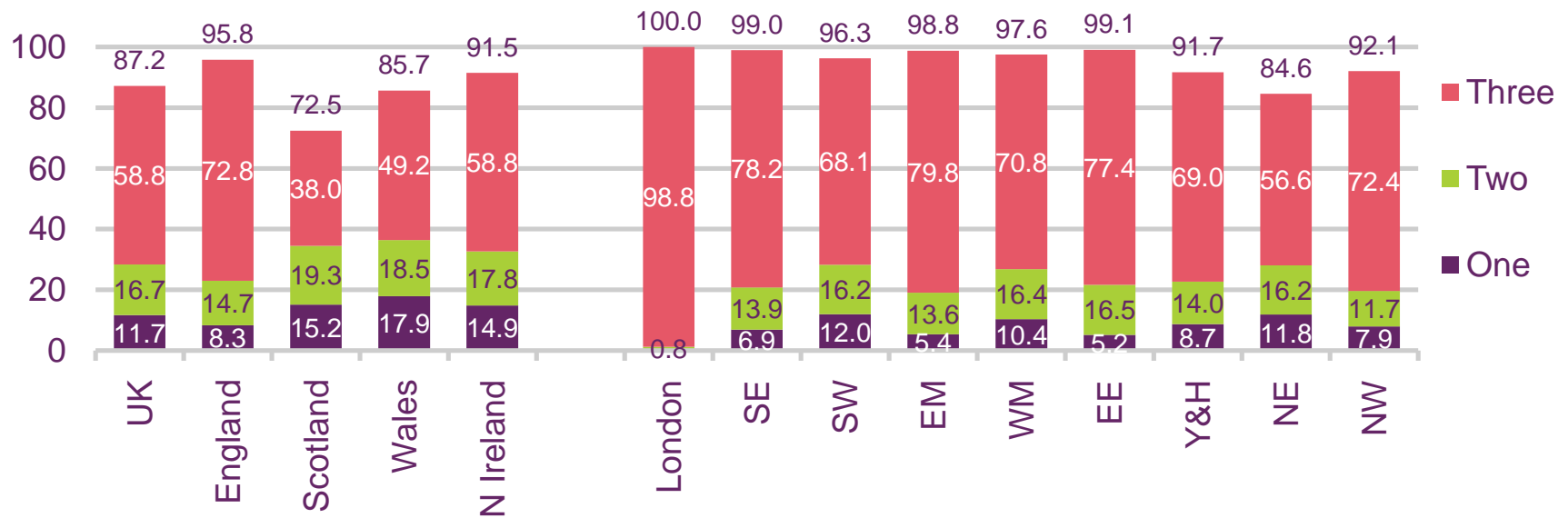


Source: Ofcom based on operator data.

Note: Coverage is based on 200m square pixels covering the UK using an enhanced methodology. Therefore data is not comparable to that published in the 2011 Communications Market Report.

Geographic area covered by 2G mobile by number of operators

Proportion of geographic area (per cent)

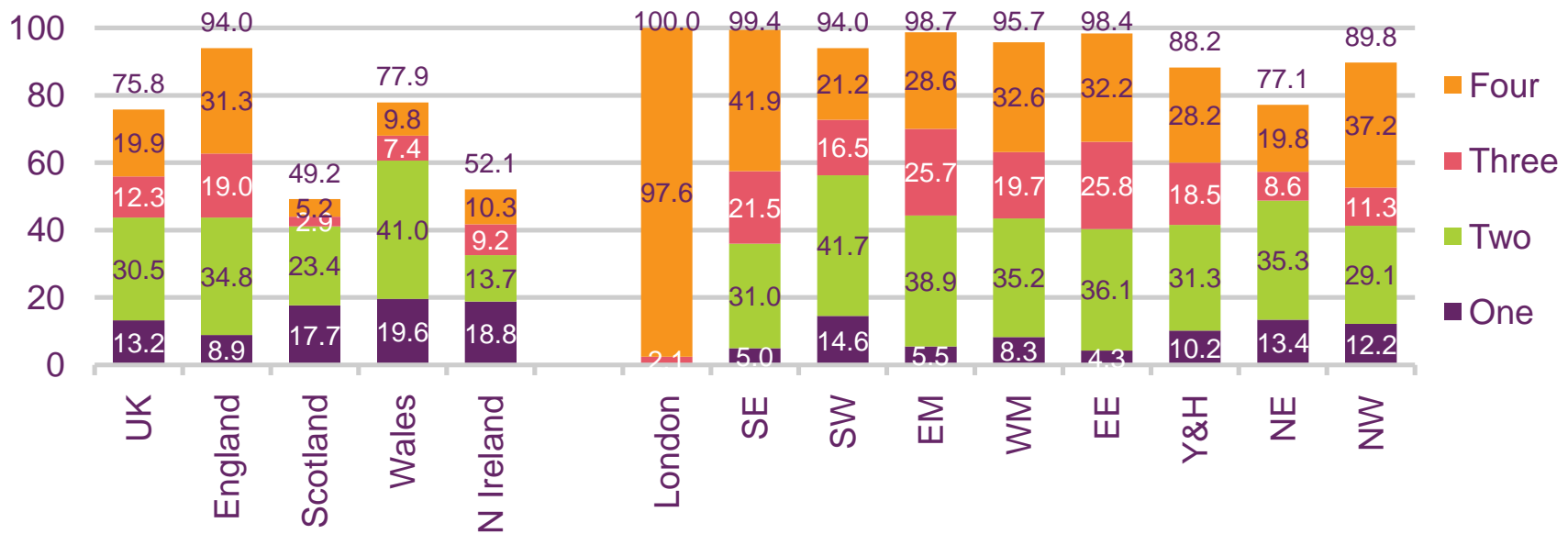


Source: Ofcom based on operator data.

Note: Coverage is based on 200m square pixels covering the UK using an enhanced methodology. Therefore data is not comparable to that published in the 2011 Communications Market Report.

Geographic area covered by 3G mobile by number of operators

Proportion of geographic area (per cent)



Source: Ofcom based on operator data.

Note: Coverage is based on 200m square pixels covering the UK using an enhanced methodology. Therefore data is not comparable to that published in the 2011 Communications Market Report.

Take-up of communications services, 2012

		UK	Eng-land	Scot-land	Wales	N Ire-land	Eng urban	Eng rural	Lon-don	SE	SW	EM	WM	EE	Y&H	NE	NW
Individual																	
Voice telephony	Fixed Line	84%	85%	82%	80%	80%	84%	93%	78%	91%	90%	86%	79%	93%	84%	83%	80%
	Mobile	92%	93%	85%	92%	93%	93%	93%	94%	94%	92%	91%	89%	94%	93%	88%	92%
Internet	PC	79%	80%	70%	71%	73%	80%	81%	82%	86%	87%	82%	71%	87%	72%	70%	77%
	Total Internet	79%	80%	70%	73%	72%	80%	80%	79%	86%	88%	83%	71%	87%	75%	71%	76%
	Broadband (fixed and mobile)	76%	78%	68%	68%	69%	78%	79%	78%	84%	87%	82%	67%	87%	69%	69%	73%
	Fixed Broadband	72%	73%	64%	63%	66%	73%	75%	72%	80%	83%	73%	62%	85%	64%	65%	68%
	Mobile Broadband	13%	13%	12%	16%	7%	13%	9%	12%	15%	12%	18%	13%	10%	9%	10%	15%

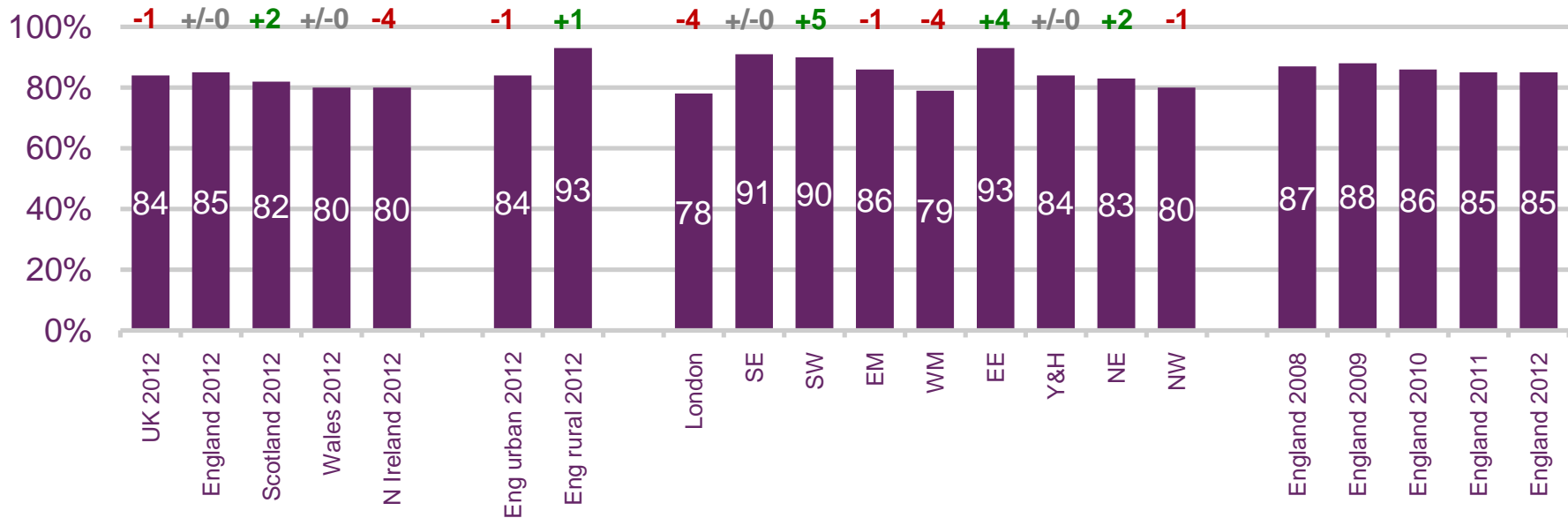
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QE9. Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West)

Fixed line take-up

Figure above bar shows % point change in fixed line take-up from Q1 2011



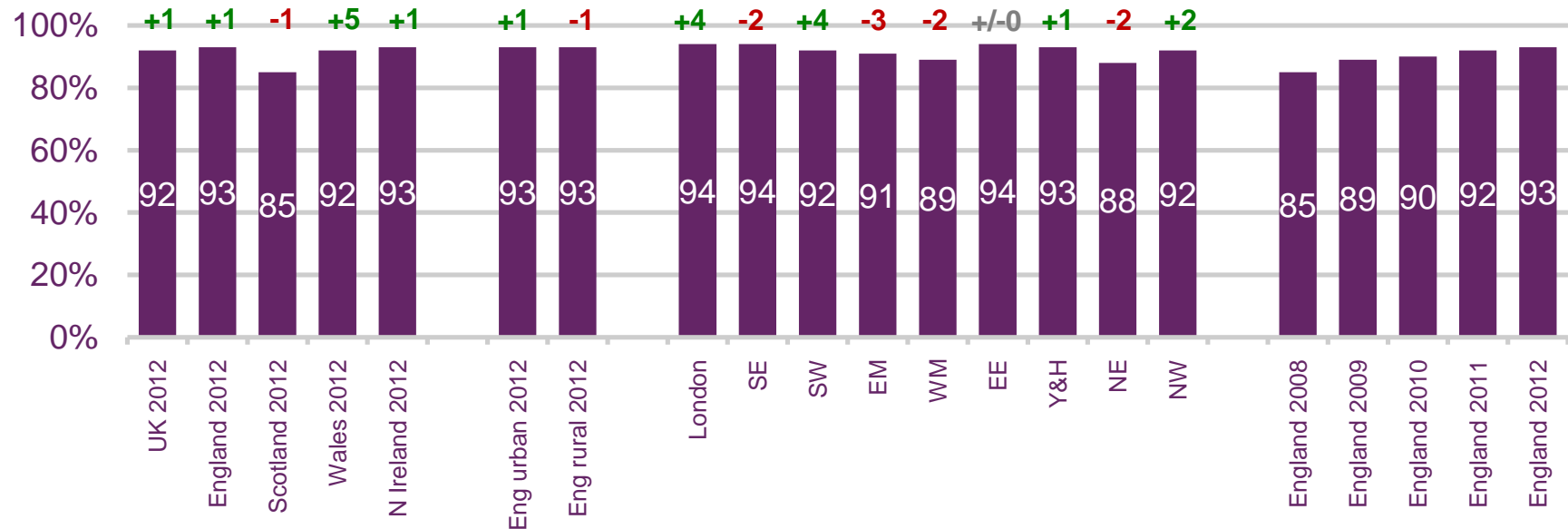
QC1. Is there a landline phone in your home that can be used to make and receive calls?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Mobile take-up

Figure above bar shows % point change in use of mobile phones from Q1 2011



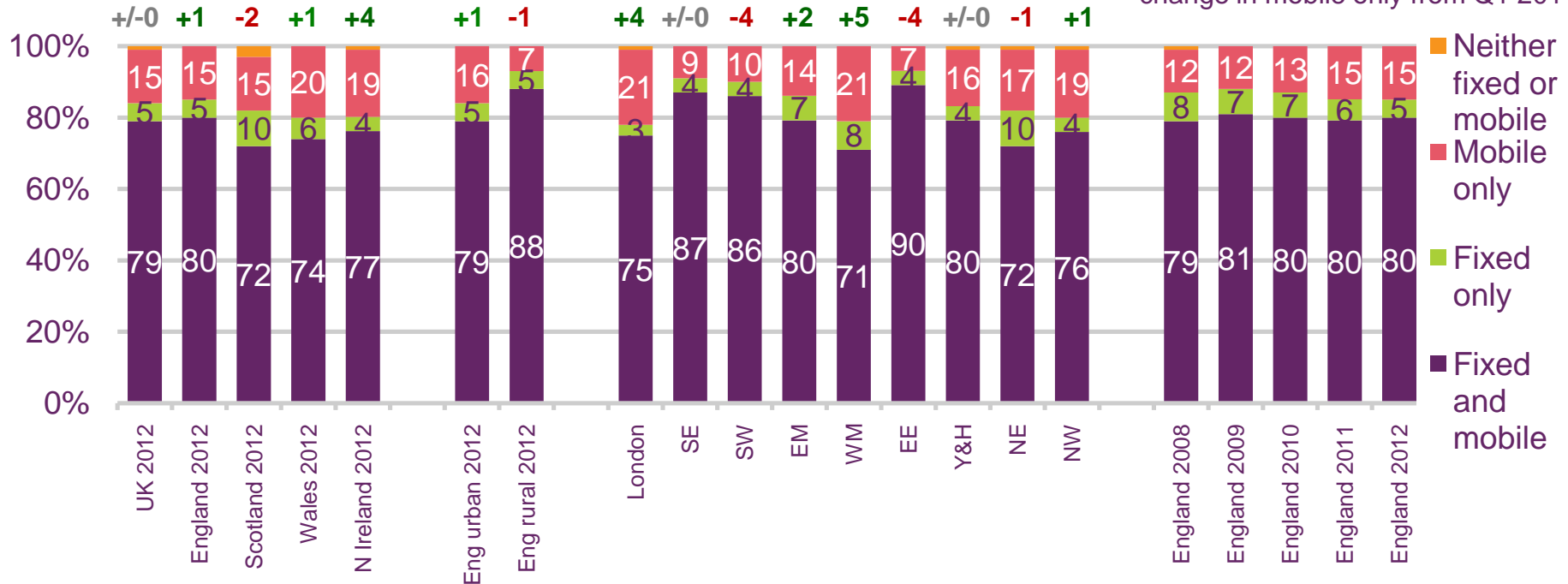
QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Cross-ownership of household telephony services

Figure above bar shows % point change in mobile only from Q1 2011



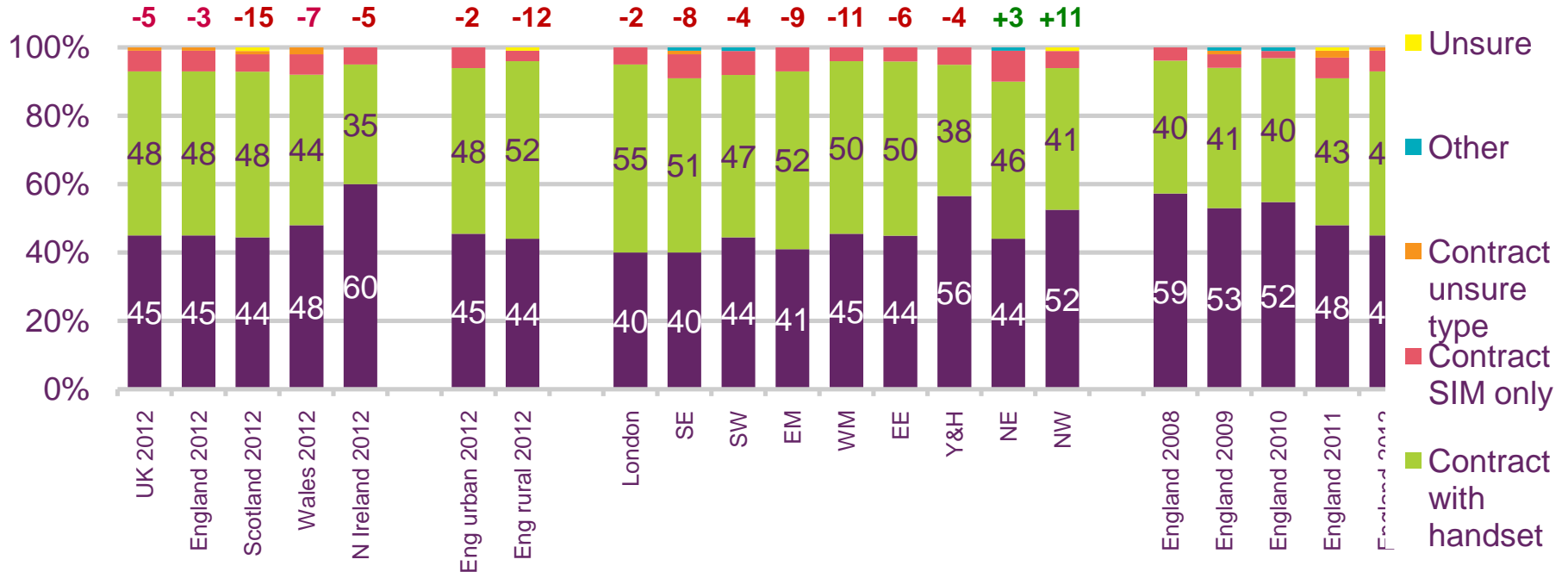
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Type of mobile subscription

Figure above bar shows % point change in prepay from Q1 2011

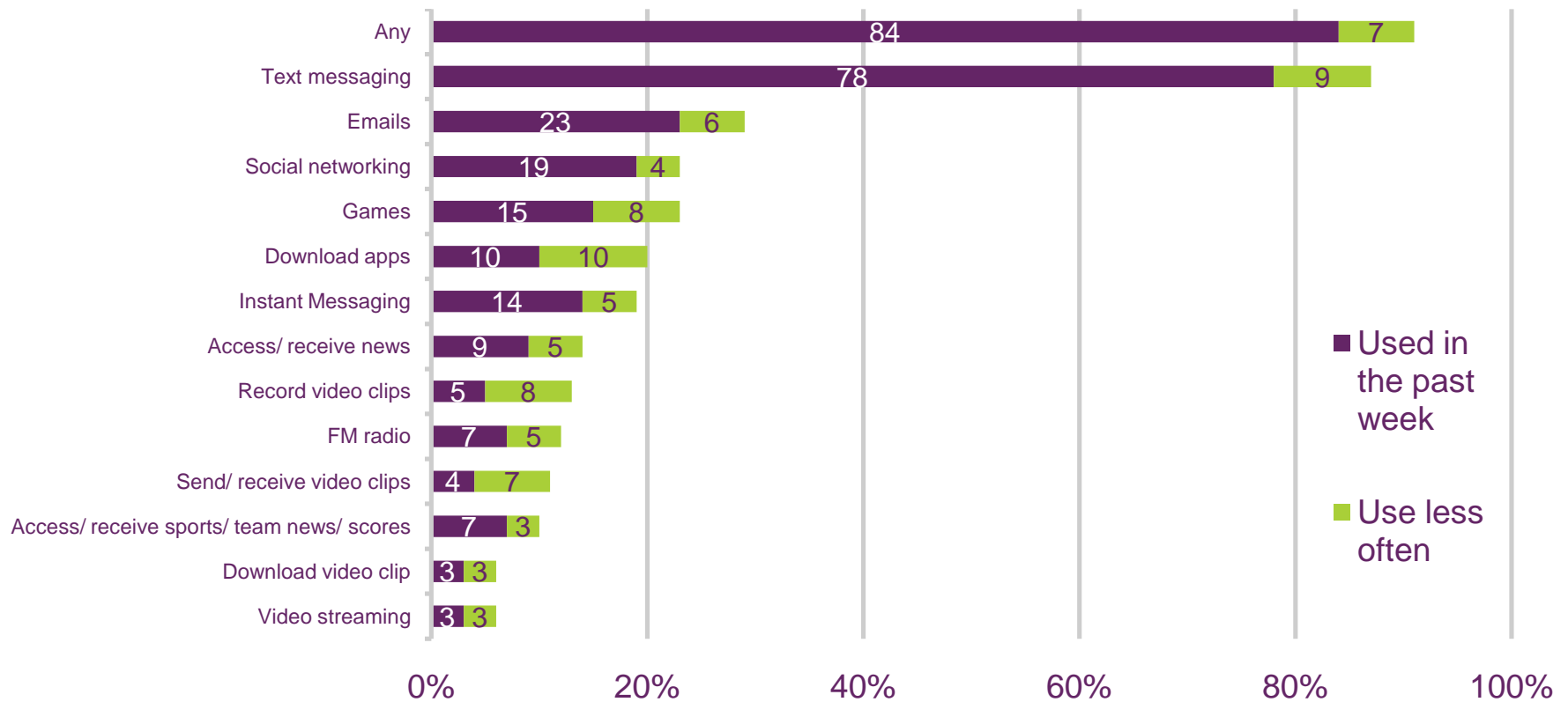


QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 2043 England, 430 Scotland, 456 Wales, 463 Northern Ireland, 1777 England urban, 266 England rural, 220 London, 232 South East, 229 South West, 236 East Midlands, 211 West Midlands, 235 East of England, 233 Yorkshire & Humber, 216 North East, 231 North West, 2860 England 2008, 2973 England 2009, 5008 England 2010, 1786 England 2011, 2043 England 2012)

Use of mobile applications

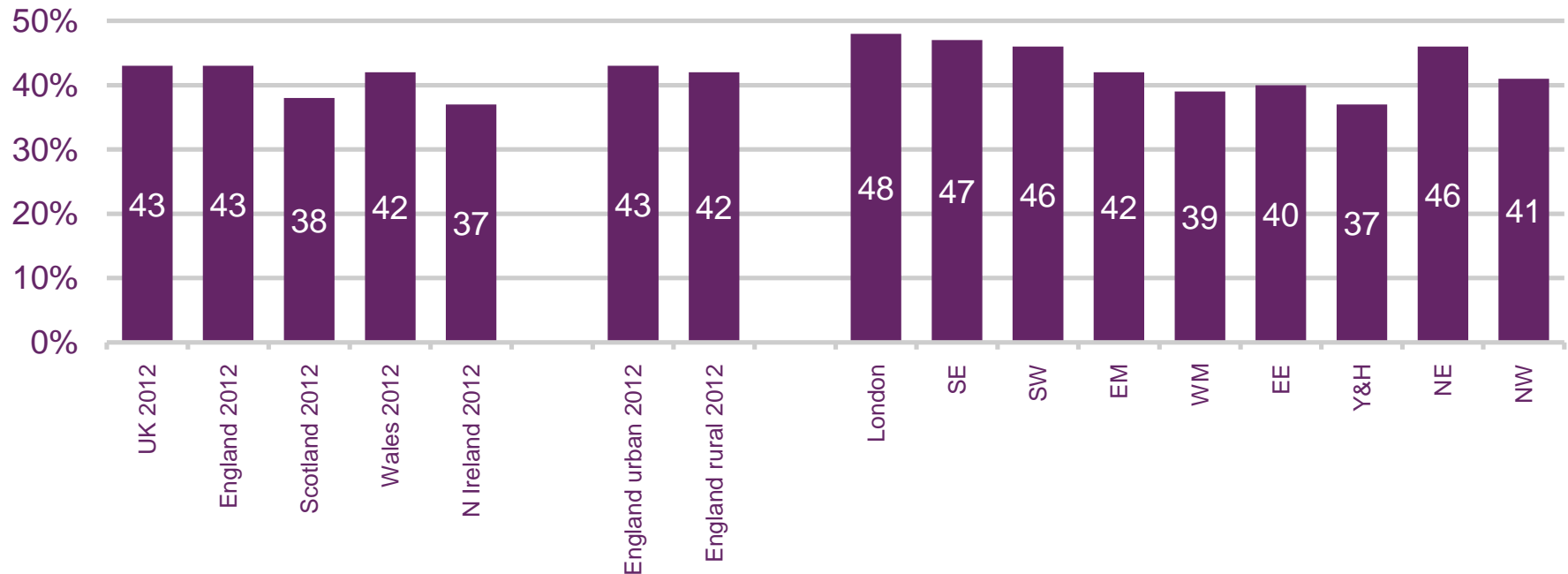


QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Q1 2012

Base: Adults aged 16+ who personally use a mobile phone (n= 2043 England 2012)

Take-up of smartphones



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 2012

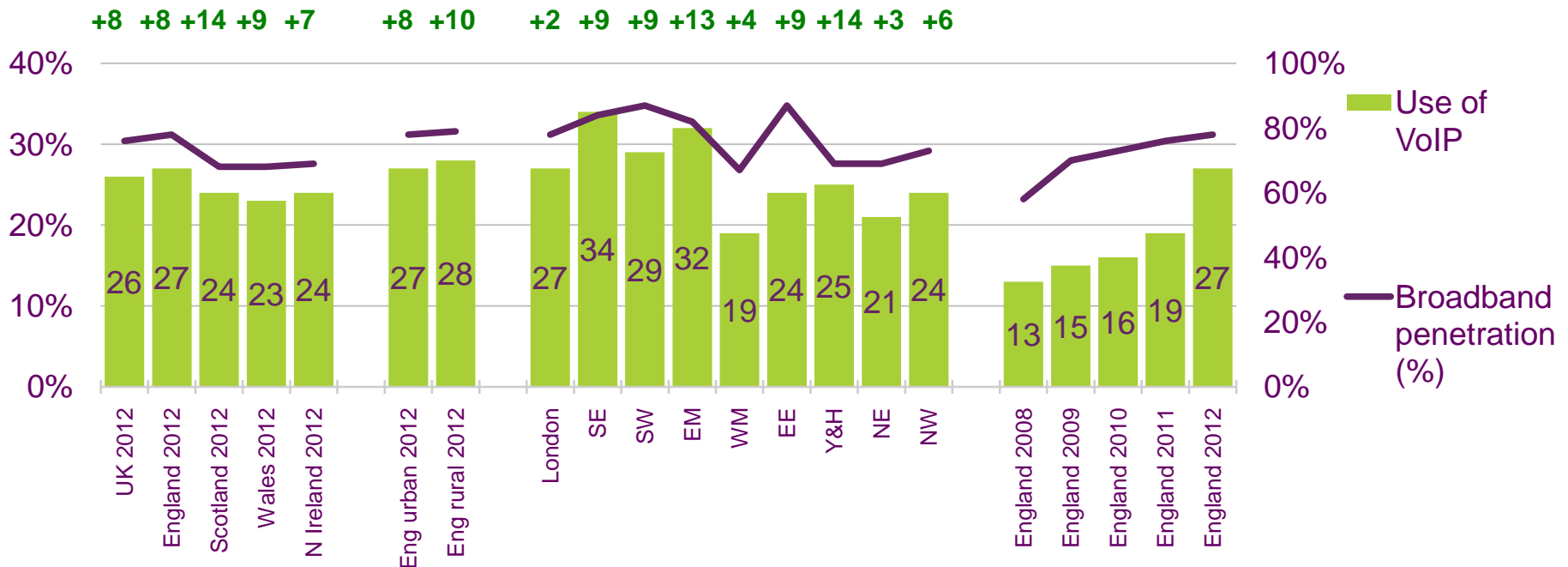
Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 2043 England, 430 Scotland, 456 Wales, 463 Northern Ireland, 1777 England urban, 266 England rural, 220 London, 232 South East, 229 South West, 236 East Midlands, 211 West Midlands, 235 East of England, 233 Yorkshire & Humber, 216 North East, 231 North West,)

Individual use of Voice over IP

Figure above bar shows % point change in current use of VoIP from Q1 2011

Individual use of VoIP

Proportion of individuals with broadband at home

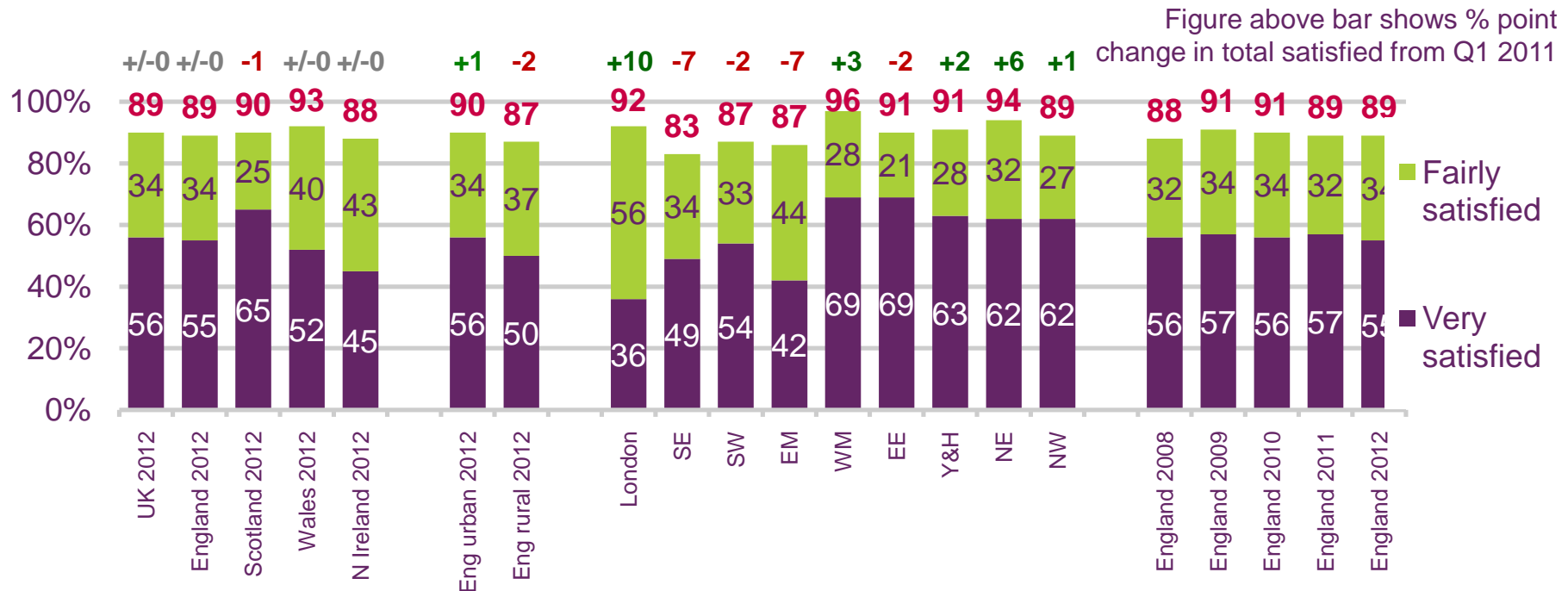


QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland, 1963 England urban, 288 England rural, 238 London, 249 South East, 251 South West, 264 East Midlands, 241 West Midlands, 252 East of England, 252 Yorkshire & Humber, 252 North East, 252 North West, 3447 England 2008, 3437 England 2009, 5709 England 2010, 1983 England 2011, 2251 England 2012)

Overall satisfaction with fixed line services



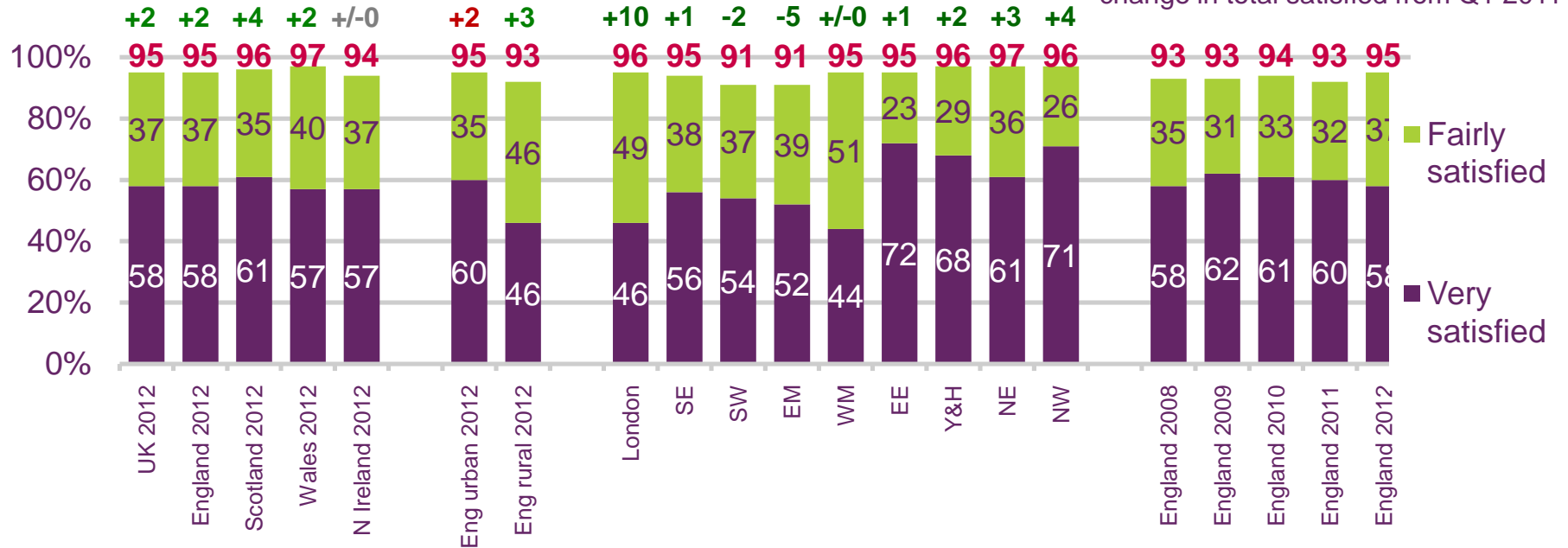
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with a landline phone at home (n = 3177 UK, 1923 England, 420 Scotland, 419 Wales, 415 Northern Ireland, 1655 England urban, 268 England rural, 188 London, 230 South East, 229 South West, 227 East Midlands, 192 West Midlands, 236 East of England, 211 Yorkshire & Humber, 210 North East, 200 North West, 2968 England 2008, 2962 England 2009, 4851 England 2010, 1707 England 2011, 1923 England 2012)

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



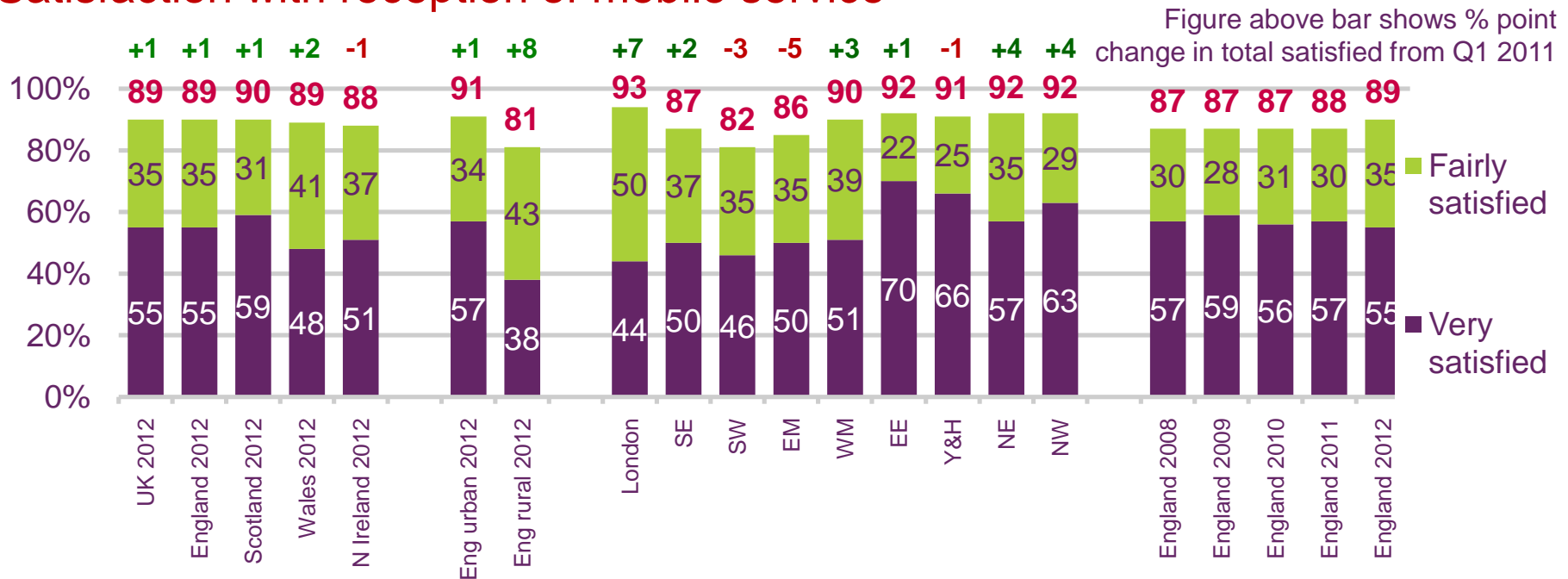
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 2043 England, 430 Scotland, 456 Wales, 463 Northern Ireland, 1777 England urban, 266 England rural, 220 London, 232 South East, 229 South West, 236 East Midlands, 211 West Midlands, 235 East of England, 233 Yorkshire & Humber, 216 North East, 231 North West, 2860 England 2008, 2973 England 2009, 5008 England 2010, 1786 England 2011, 2043 England 2012)

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



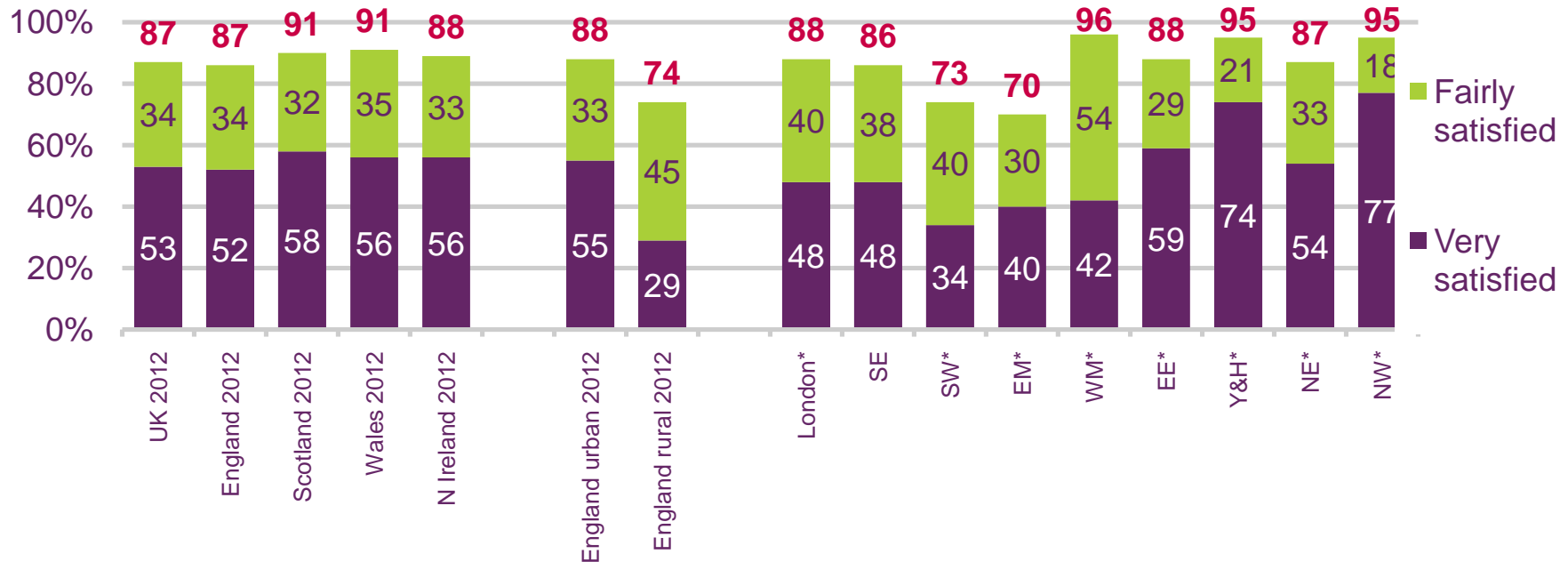
QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 2043 England, 430 Scotland, 456 Wales, 463 Northern Ireland, 1777 England urban, 266 England rural, 220 London, 232 South East, 229 South West, 236 East Midlands, 211 West Midlands, 235 East of England, 233 Yorkshire & Humber, 216 North East, 231 North West, 2860 England 2008, 2973 England 2009, 5008 England 2010, 1786 England 2011, 2043 England 2012)

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 2012

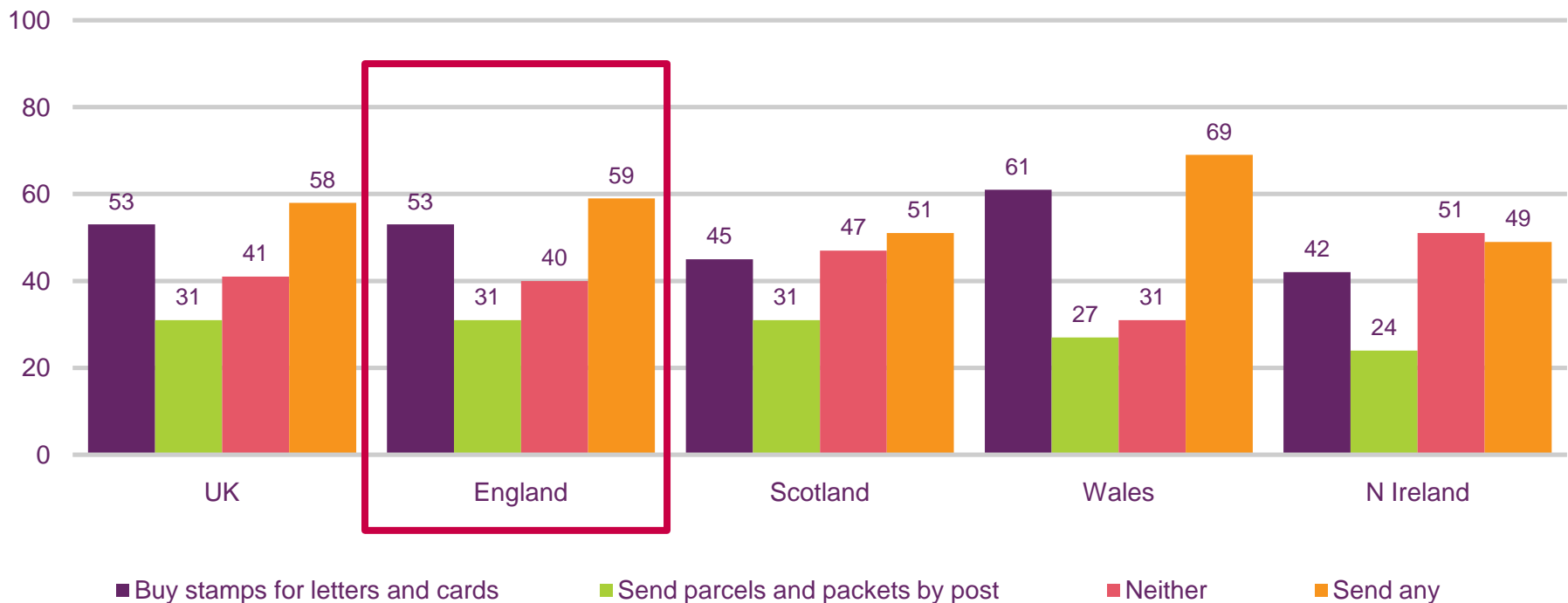
Base: Adults aged 16+ who personally use a smartphone (n = 1302 UK, 809 England, 157 Scotland, 174 Wales, 162 Northern Ireland, 707 England urban, 102 England rural, 99 London, 101 South East, 99 South West, 92 East Midlands, 75 West Midlands, 88 East of England, 75 Yorkshire & Humber, 92 North East, 88 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

*Caution: Low base

Post

Regular use of postage stamps and postal services products by nation

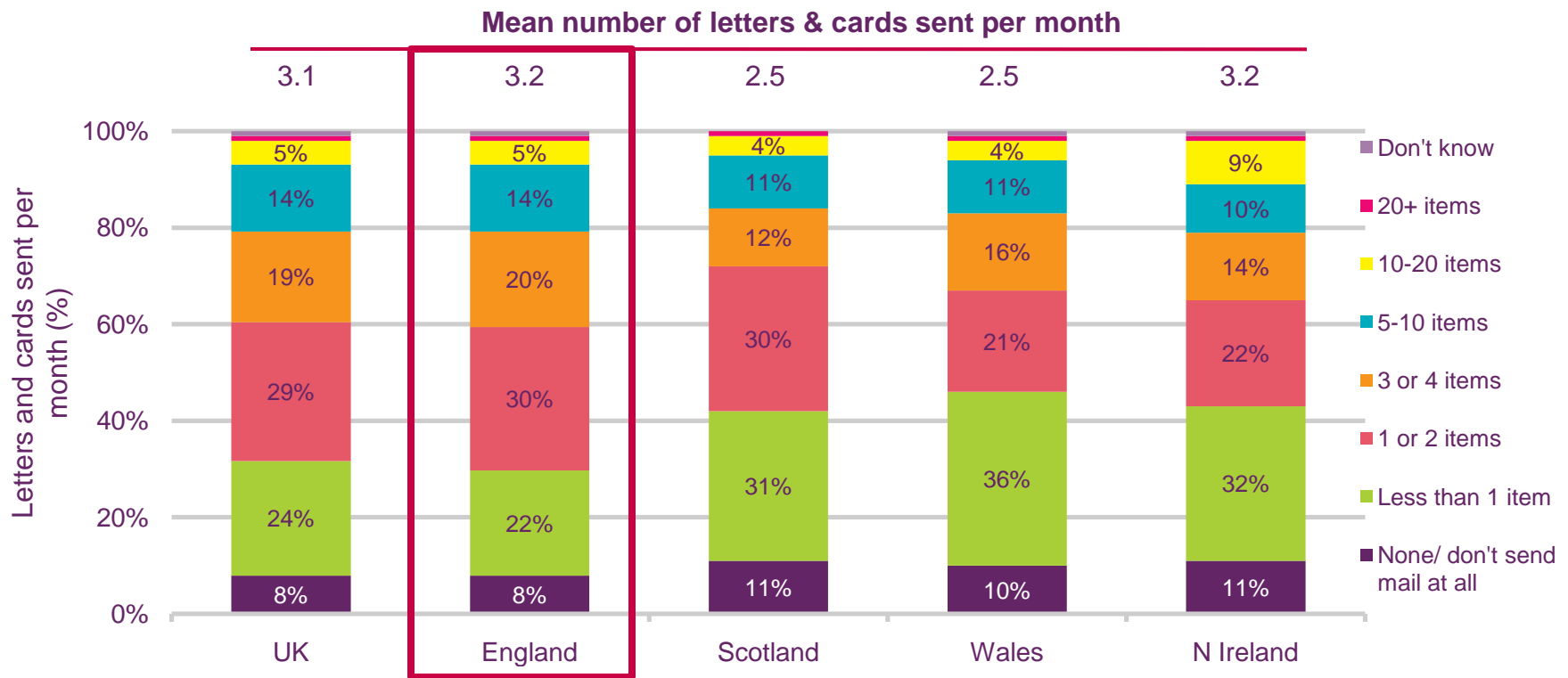


Source: Ofcom Attitudes toward spending research, 2012

Base: All adults aged 16+ (n = 2124 UK, 1726 England, 182 Scotland, 99 Wales, 117 Northern Ireland)

Q: Do you or anyone in your household regularly do any of the following...

Approximate number of letters and cards sent per month - personal mail

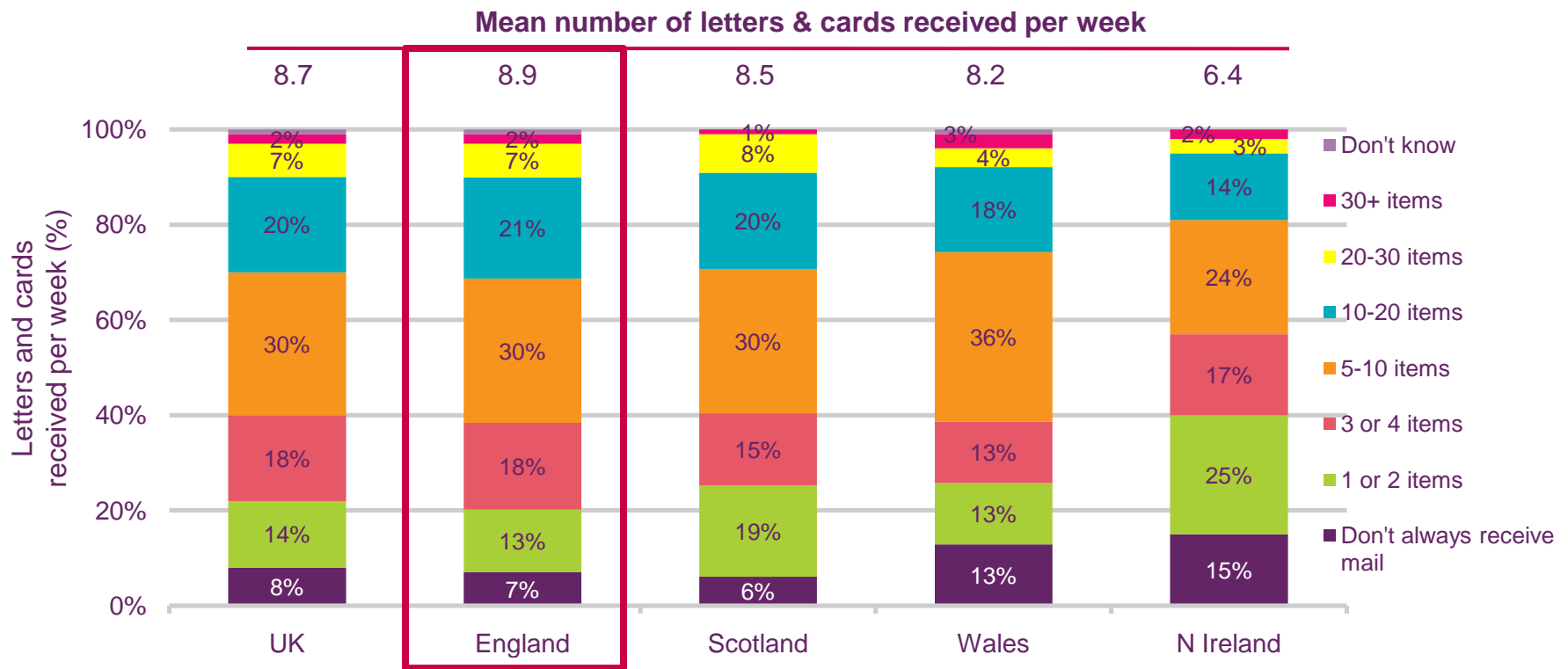


Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Approximately how many letters and cards, do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately.

Approximate number of letters and cards received per week

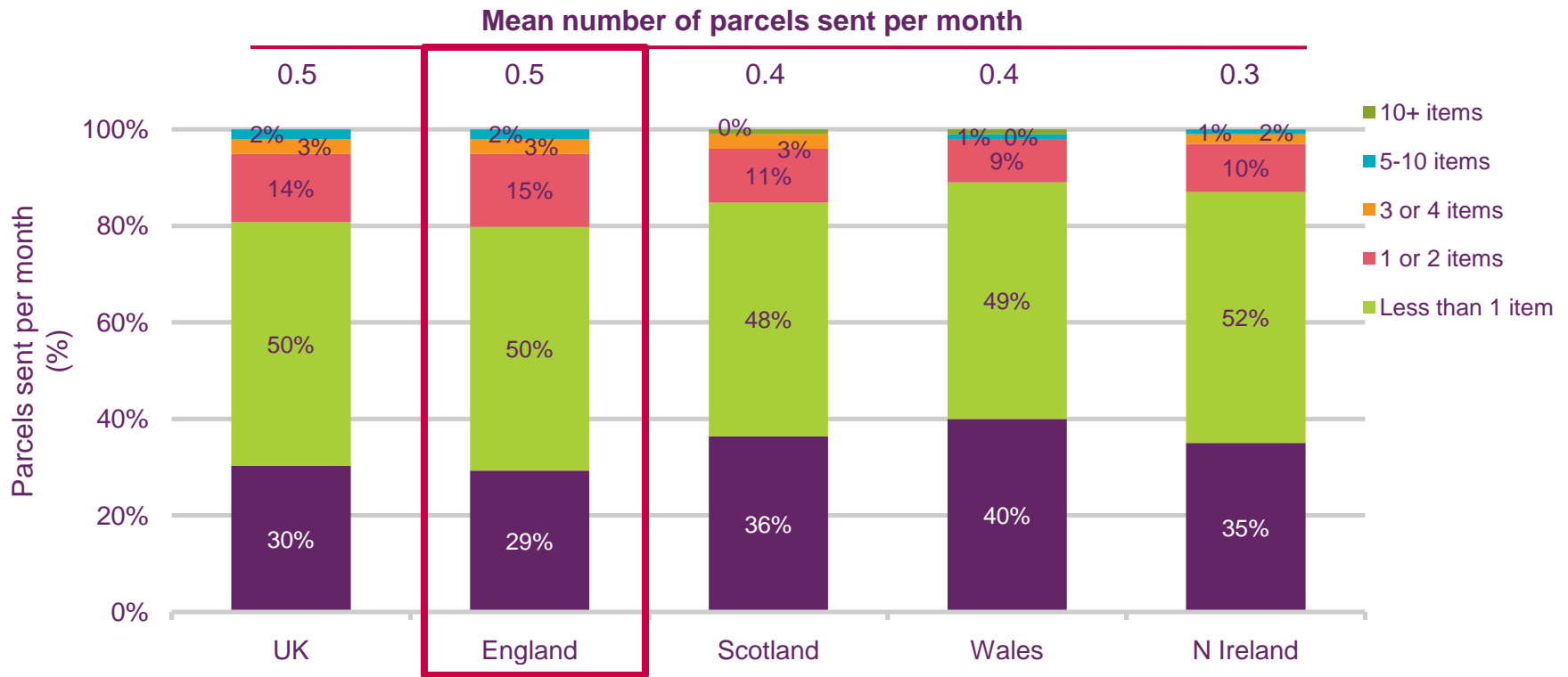


Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Approximately how many letters or cards do you receive in an average week? Please don't include parcels, we will ask you about these separately.

Approximate number of parcels sent per month - personal mail

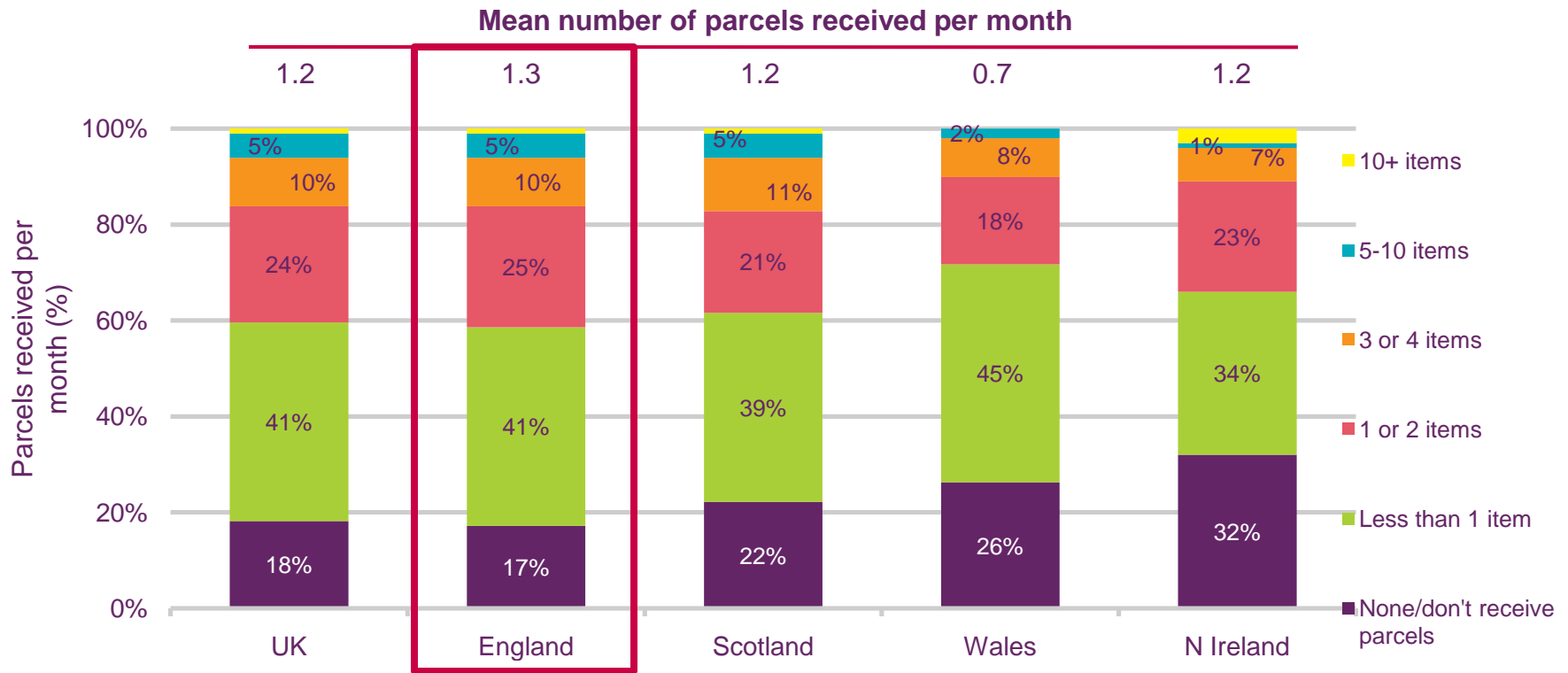


Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Please now think about the parcels you send. How many parcels do you send in an average month?

Approximate number of parcels received per month - personal mail



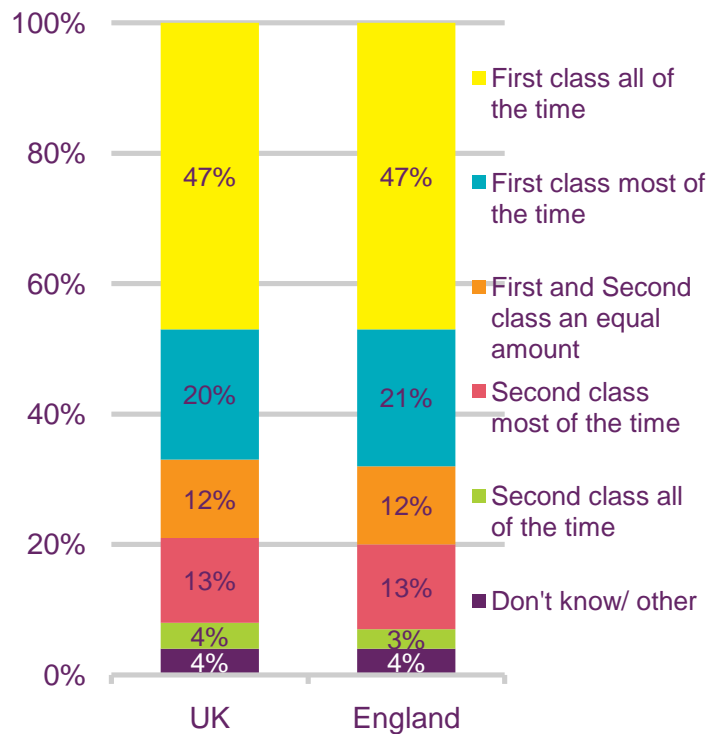
Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

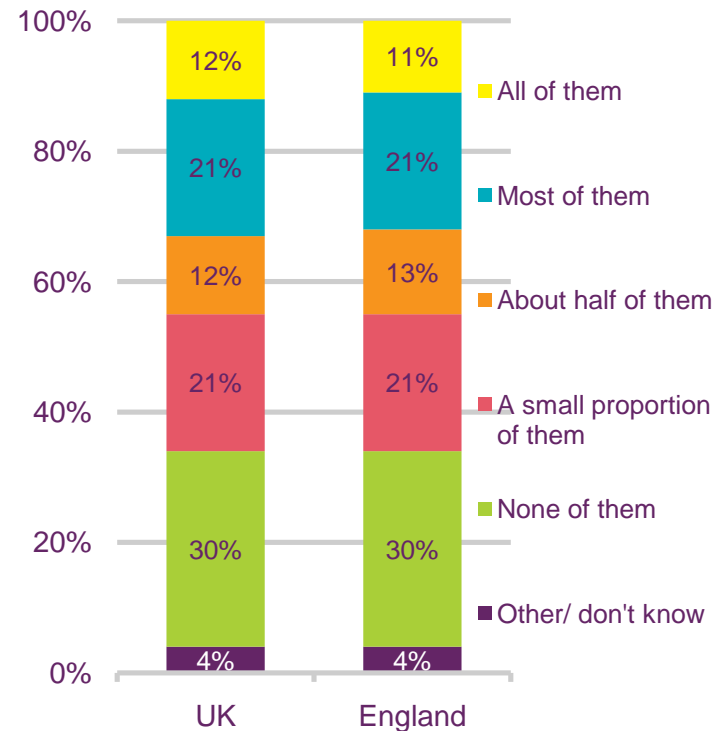
Q. Approximately how many parcels do you receive in an average month?

Use of First and Second class post

Use of first and second class for letters



Proportion of letters/ cards that must be at their destination next working day

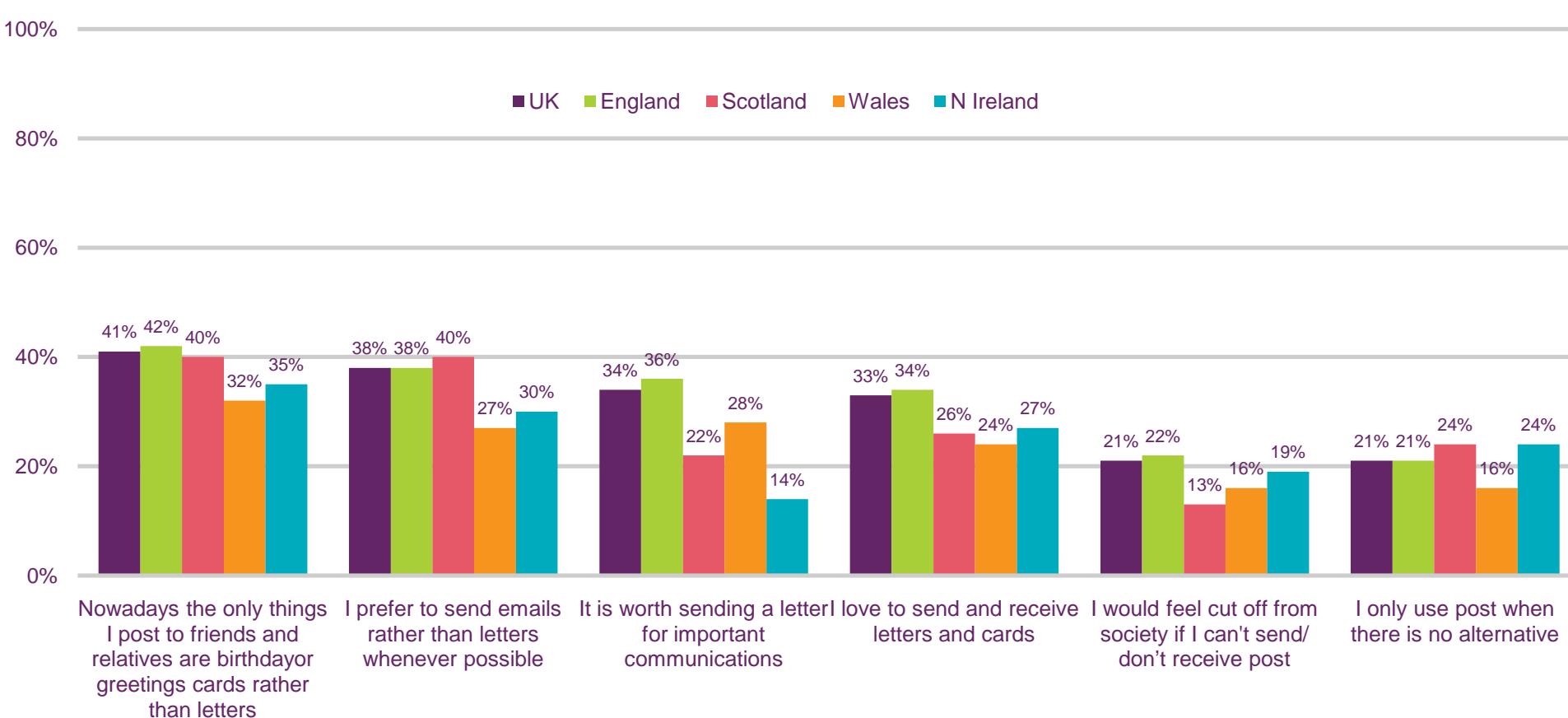


Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3024 England)

Q. When sending letters/ cards which do you use? And what proportion of these letters/ cards have to be at their destination the next working day?

Agreement with statements about post



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Which of these statements apply to you?