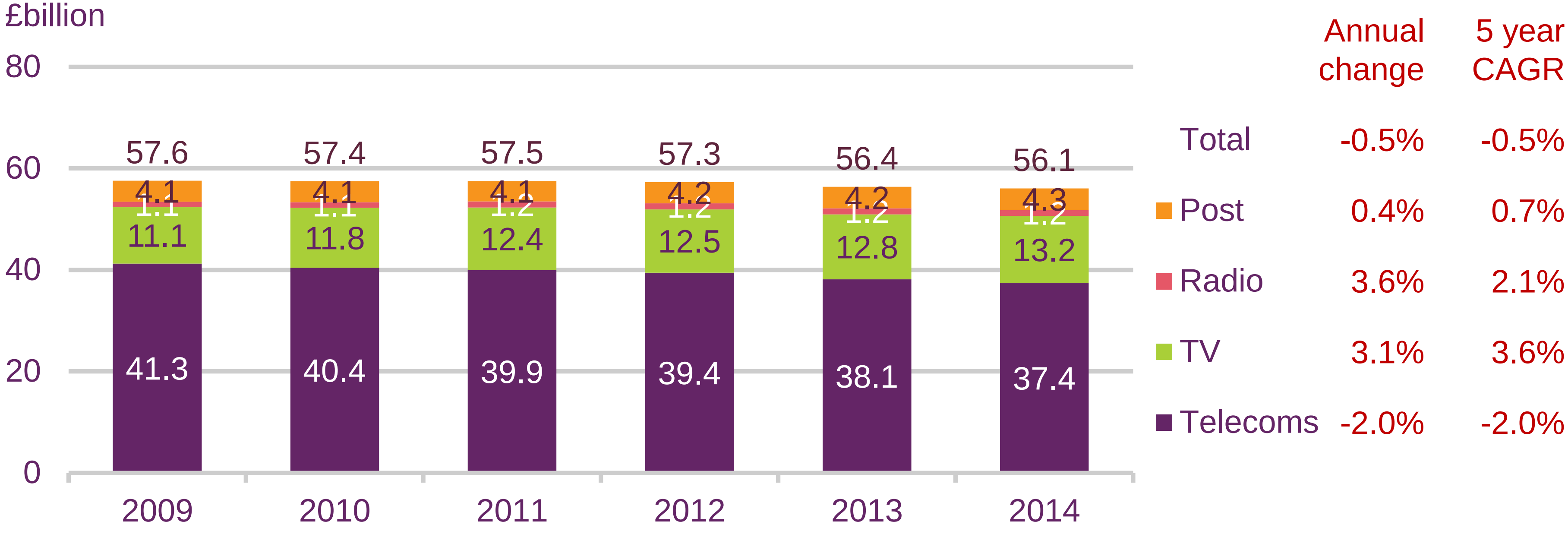
CMR 2015: Market in context

Key Market Trends

Figure 1.2

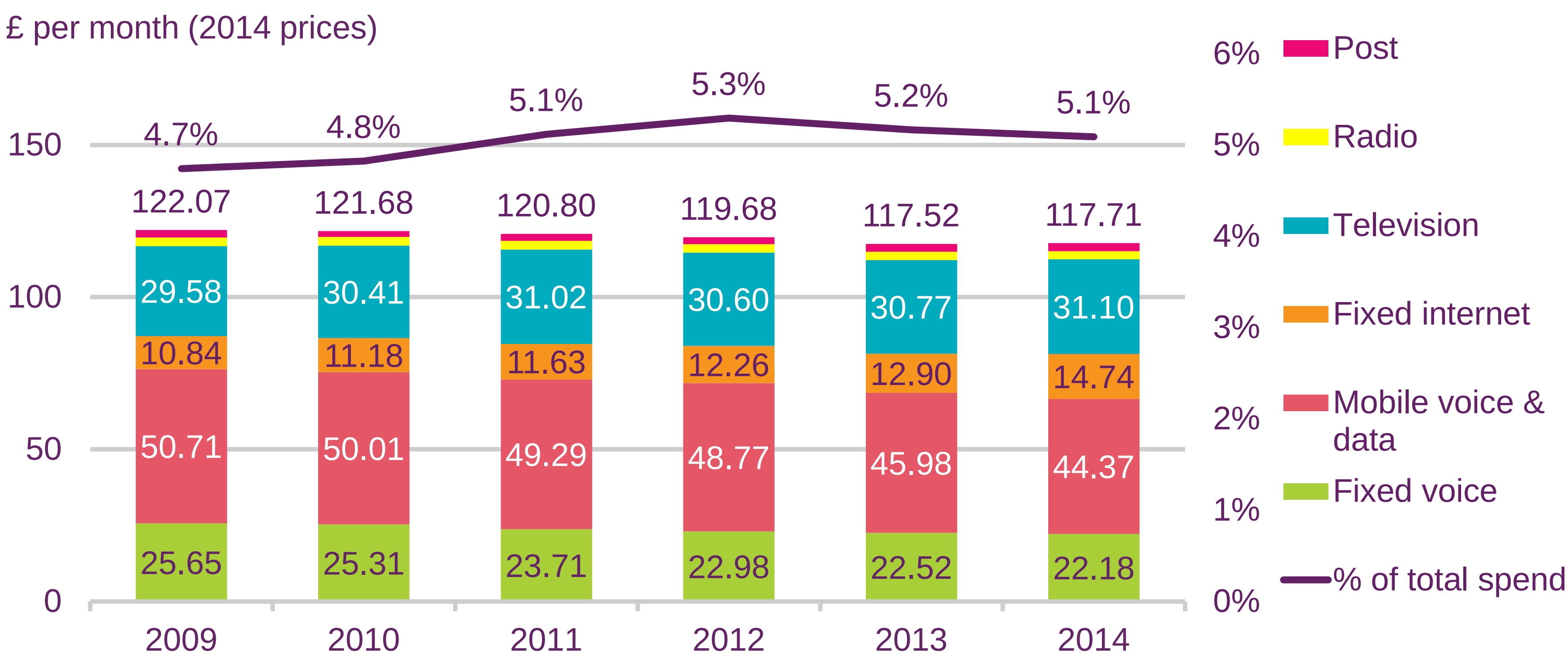
Communications industry revenue – telecoms, TV, radio, post



Source: Ofcom/ operators
Note: Includes licence fee allocation for radio and TV, figures are in nominal terms. Post is addressed letter mail.

Figure 1.3

Average household spend on communications services



Source: Ofcom / operators/ ONS
Notes: Adjusted for CPI; historic telecoms figures have been re-stated, so are not comparable to those published in previous reports. Television excludes spend on subscriptions, download-to-own and pay-per-view online TV services.

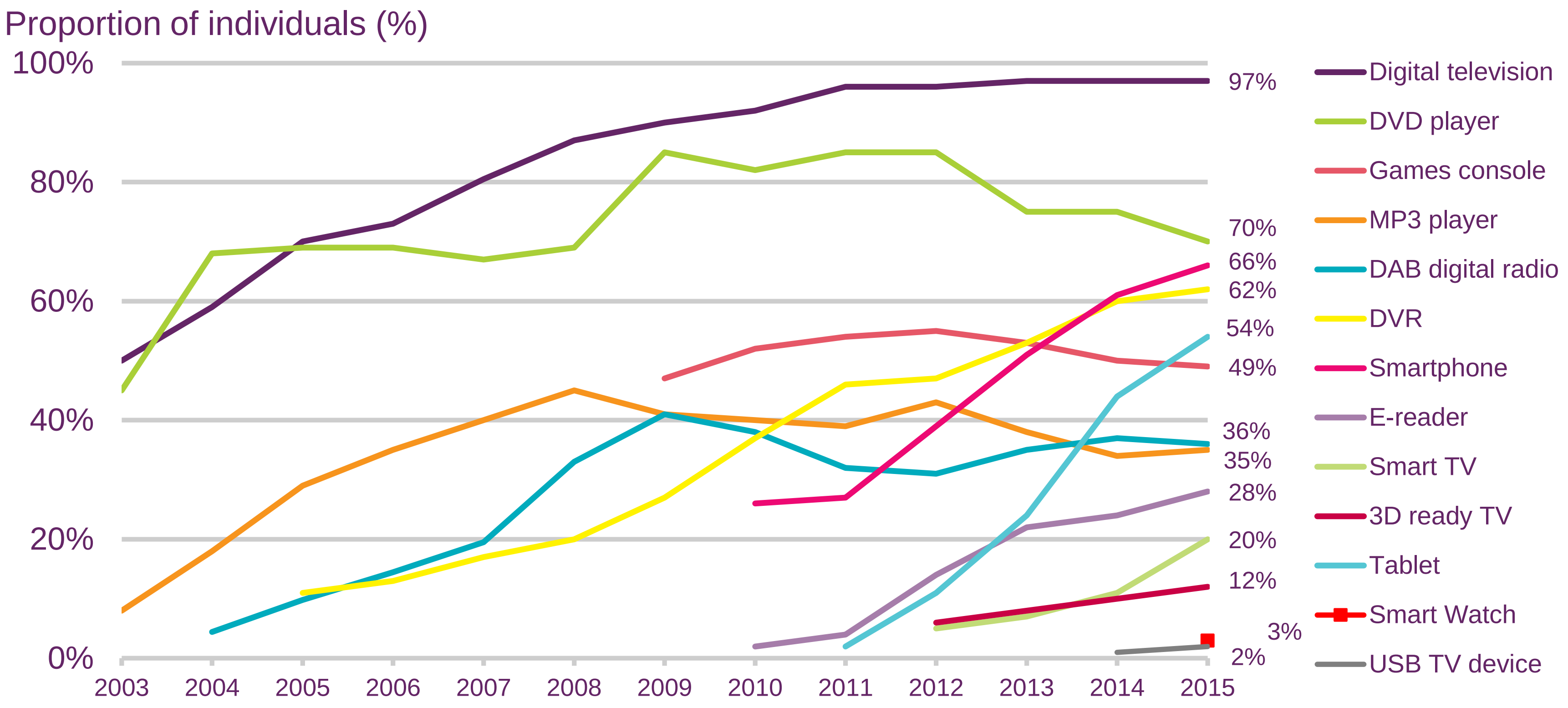
Figure 1.4 Digital communications service availability

Platform	UK 2014	UK 2013	UK change		England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0pp		100%	100%	100%	100%
2G mobile[1]	99.7%	99.7%	0pp		99.8%	99.5%	98.9%	98.9%
3G mobile[2]	99.3%	99.2%	0.1pp		99.6%	97.1%	97.9%	98.6%
4G mobile[3]	89.5%	71.8%	17.7pp		92.1%	79.7%	62.8%	91.1%
LLU ADSL broadband[4]	95%	95%	0pp		96%	89%	93%	89%
Virgin Media cable broadband[5]	44%	44%	0pp		47%	36%	21%	27%
BT Openreach/Kcom fibre broadband[6]	82%	69%	13pp		82%	75%	83%	92%
NGA broadband[7]	90%	78%	12pp		90%	85%	87%	95%
Superfast broadband[8]	83%	-	n/a		84%	73%	79%	77%
Digital satellite TV[9]	98%	98%	0pp		No data	No data	No data	No data
Digital terrestrial TV[10]	99%	99%	0pp		99%	99%	98%	97%
DAB BBC Network[11]	95.4%	94.0%	1.4pp		96.5%	92.3%	89.2%	85.4%
DAB commercial network (Digital One)[12]	89.8%	89.5%	0.3pp		91.3%	76.4%	64.1%	76.1%

Sources: Ofcom and operators:
1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator, May 2015; 2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator, May 2015; 3. Proportion of premises that have outdoor 4G mobile coverage from at least one operator, May 2015; 4. Proportion of premises connected to an LLU-enabled BT local exchange area, December 2014; 5. Proportion of premises able to receive Virgin Media cable broadband services, May 2015; 6. Proportion of premises able to receive Openreach/Kcom fibre broadband services, May 2015; 7. Proportion of premises able to receive NGA broadband services, May 2015; 8. Proportion of premises able to receive superfast broadband services, May 2015; 9. Relates only to the ability to achieve a necessary line of sight path to the satellite and does not include other factors that can affect coverage including: access in multi-dwelling units where is not feasible to install a dedicated household satellite dish and there is no internal wired distribution system for satellite, and the need for planning permission in some locations.10. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). DTT Frequency Planning Group (Arqiva, BBC, Ofcom); Relates to an assumption that consumers will install, if needed, a good quality terrestrial TV aerial at a height of 10m to achieve reception. 11. BBC National DAB network coverage as of end of 2014 12. Digital One coverage Note: Cable, fibre and NGA broadband availability figures have been calculated using a different methodology than in previous years

Figure 1.5

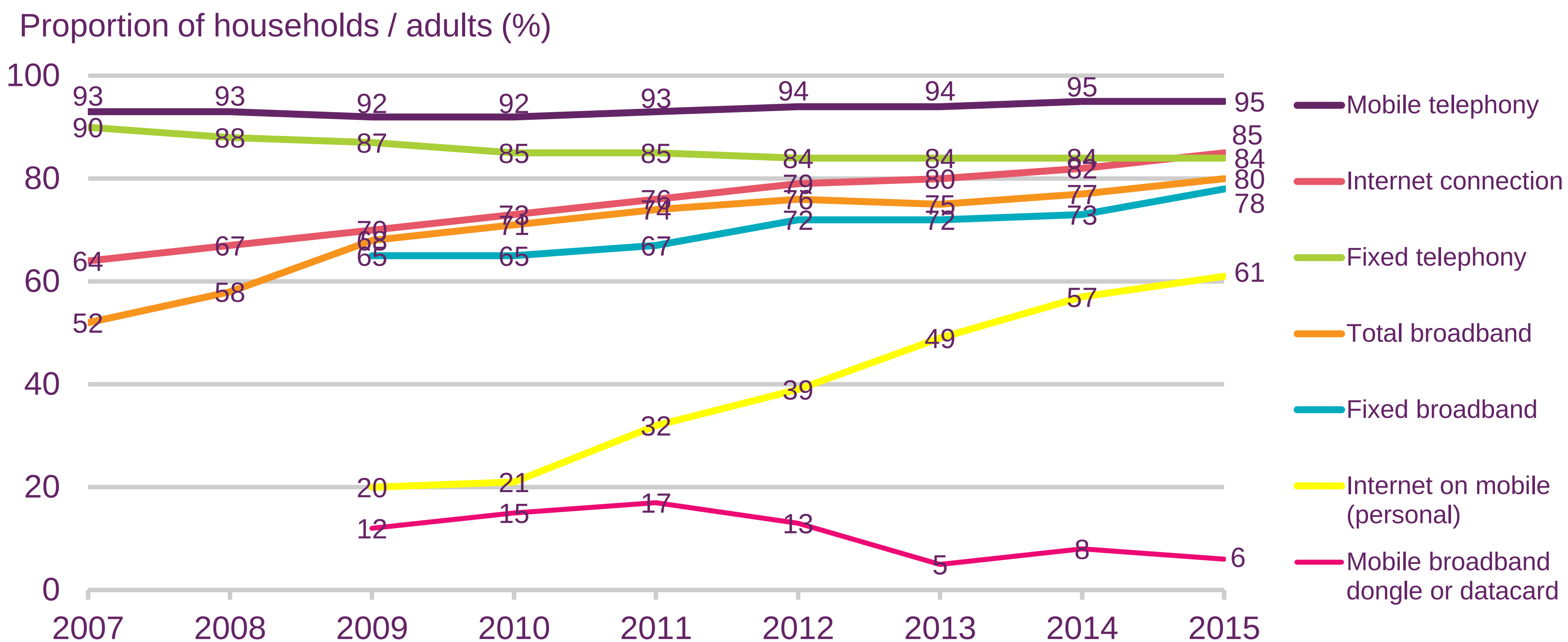
Household take-up of digital communications/ AV devices: 2003-2015



Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756)
Note: The question wording for DVD player and DVR was changed in Q1 2009 so data are not directly comparable with previous years

Figure 1.6

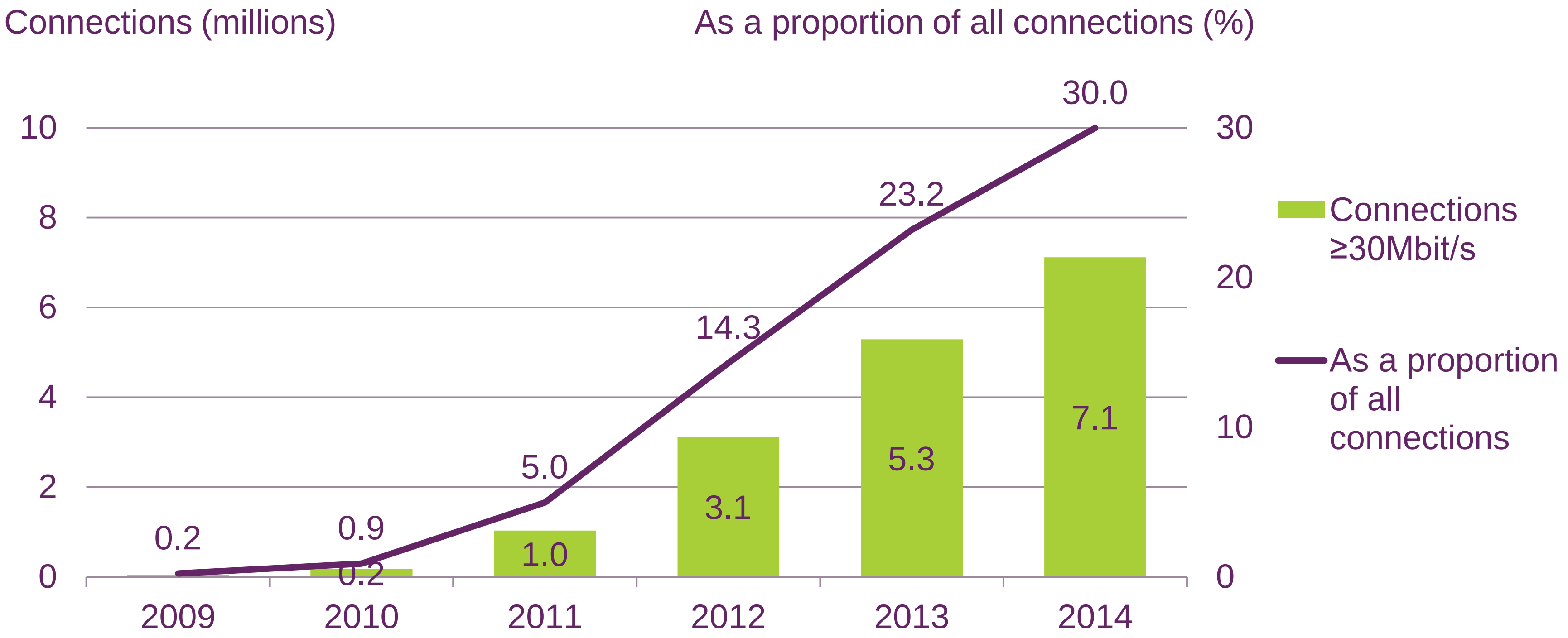
Take-up of communications services



Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756).
QC1: Is there a landline phone in your home that can be used to make and receive calls? QE1: Does your household have a PC or laptop computer? / QE8(QE2): Do you or does anyone in your household have access to the internet/ World Wide Web at home (via any device, e.g. PC, laptop, mobile phone etc.)? / QE12(QE9): Which of these methods does your household use to connect to the internet at home? Use of internet on mobile is personal take-up measure, whereas the other data relate to household take-up.

Figure: 1.7

Take-up of superfast broadband services

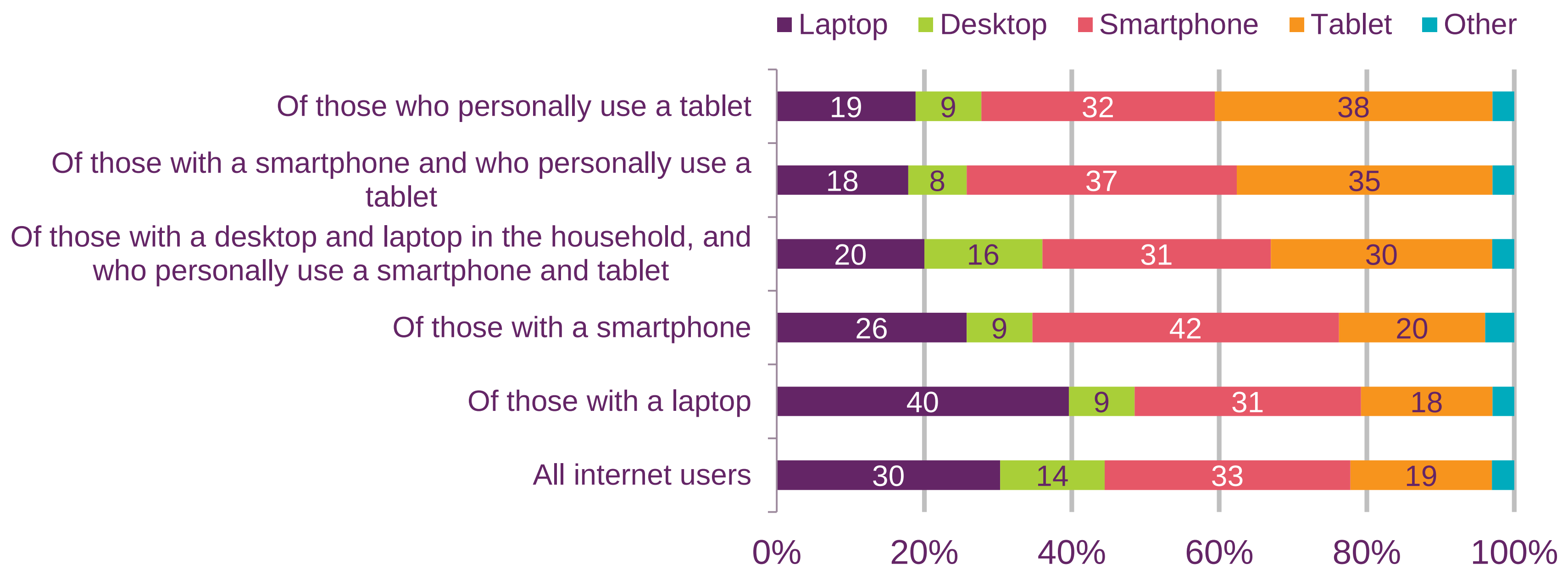


Source: Ofcom / operators
Notes: Includes estimates where Ofcom does not receive data from operators; includes Ofcom adjustment to exclude FTTC connections delivering less than 30Mbit/s

Figure 1.8

Most important device for connecting to the internet

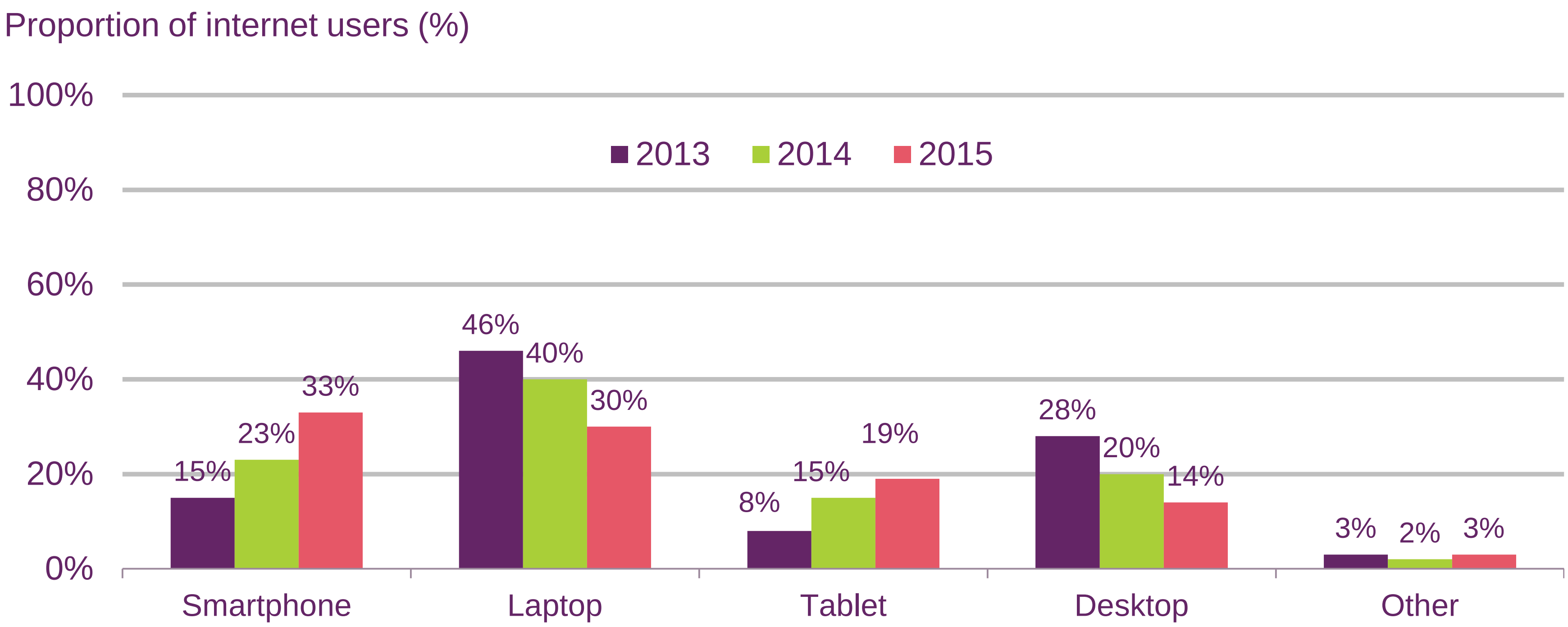
Device owners (%)



Source: Ofcom Technology Tracker, Q1 2015
Base: Devices used by those who use the internet at home or elsewhere: Tablet (1528), smartphone & tablet (1276), desktop & laptop & smartphone & tablet (389), smartphone (2277), laptop (2214), all internet users (3095 UK).
QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” includes: “netbook”, “games console”, “other device”, “none” and “don’t know”.

Figure 1.9

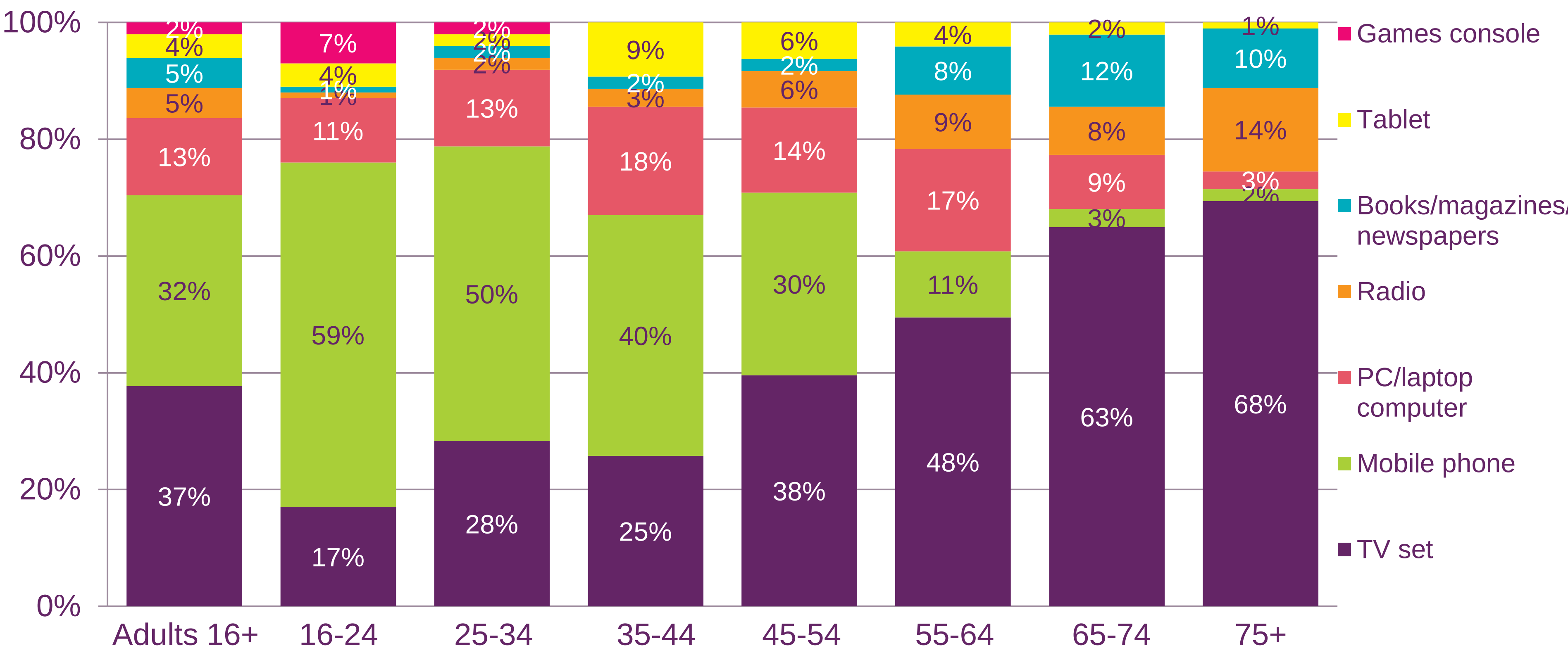
Most important device for connecting to the internet: 2013-2015



Source: Ofcom Technology Tracker, Data from Q1
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK).
QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “netbook”, “games console”, “other device”, none” and “don’t know”.
Ranked by 2015

Figure: 1.10

Most-missed media device, by age

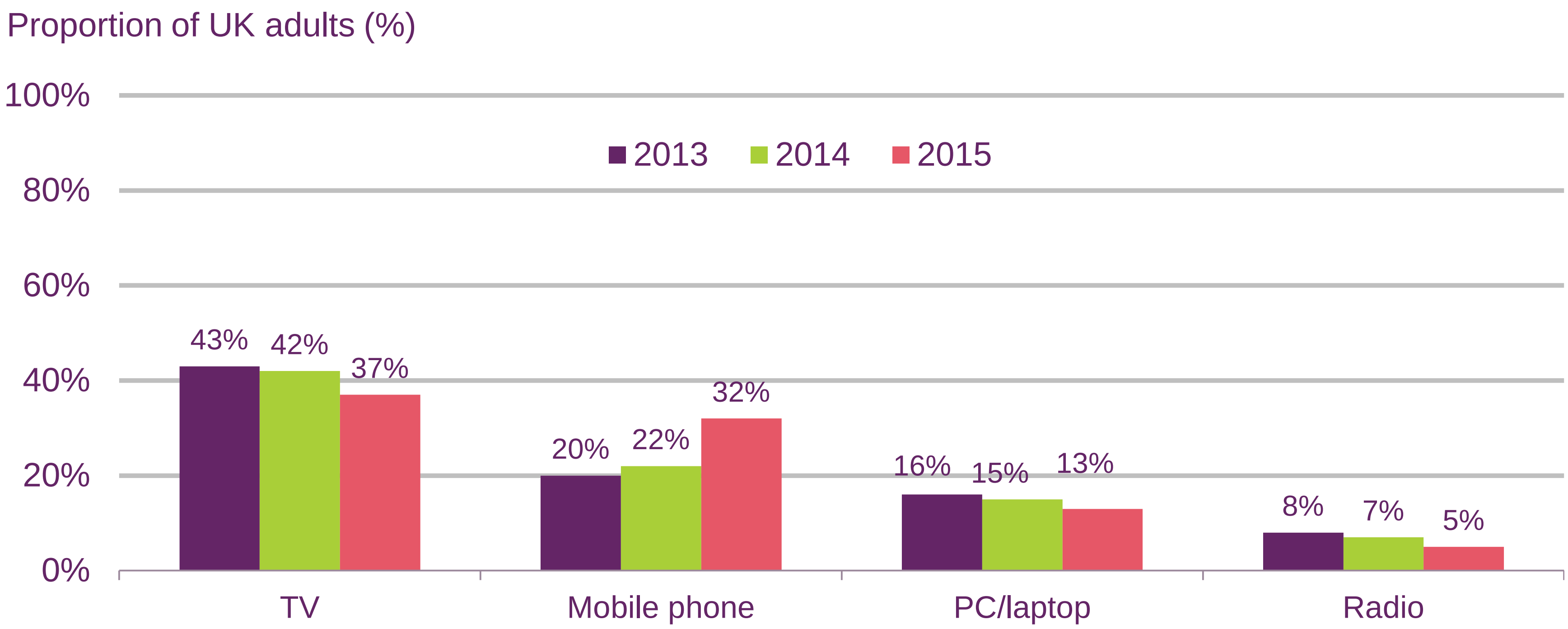


	Adults 16+	16-24	25-34	35-44	45-54	55-64	65-74	75+
Games console	2%	7%	2%					
Tablet	4%	4%	2%	9%	6%	4%	2%	1%
Books/magazines/newspapers	5%	1%	2%	2%	2%	8%	12%	10%
Radio	5%	1%	2%	3%	6%	9%	8%	14%
PC/laptop computer	13%	11%	13%	18%	14%	17%	9%	3%
Mobile phone	32%	59%	50%	40%	30%	11%	3%	2%
TV set	37%	17%	28%	25%	38%	48%	63%	68%

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+).
A2 – Which one of these things you use almost every day would you miss the most if it got taken away?

Figure 1.11

Most-missed media device: 2013-2015

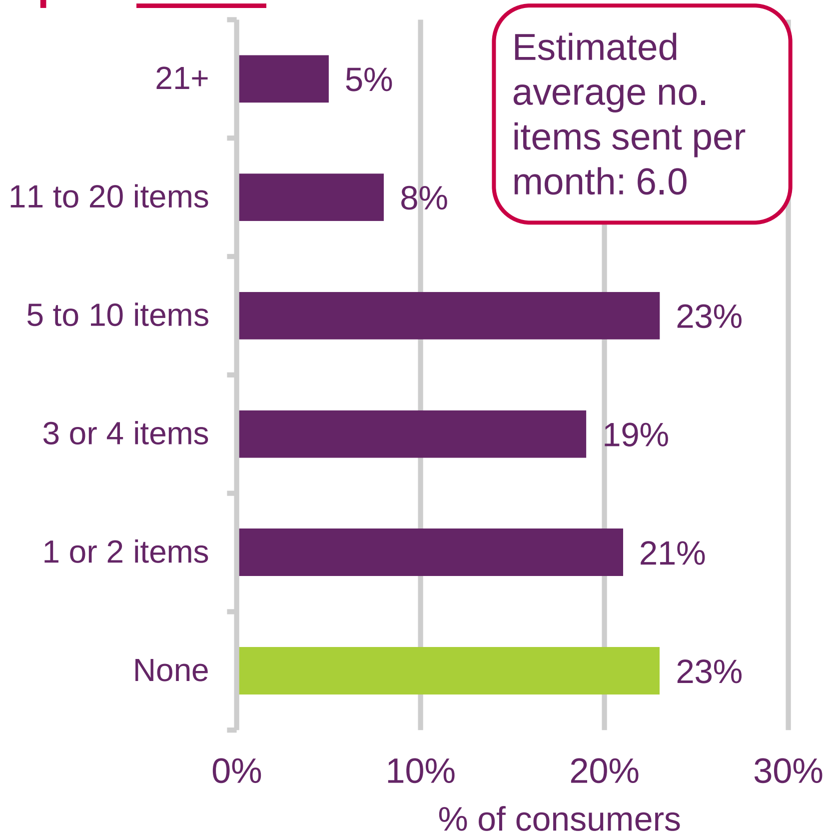


A2 – Which one of these things you use almost every day would you miss the most if it got taken away? (Prompted responses, single coded)
NB Showing responses by >1% of all adults
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+).

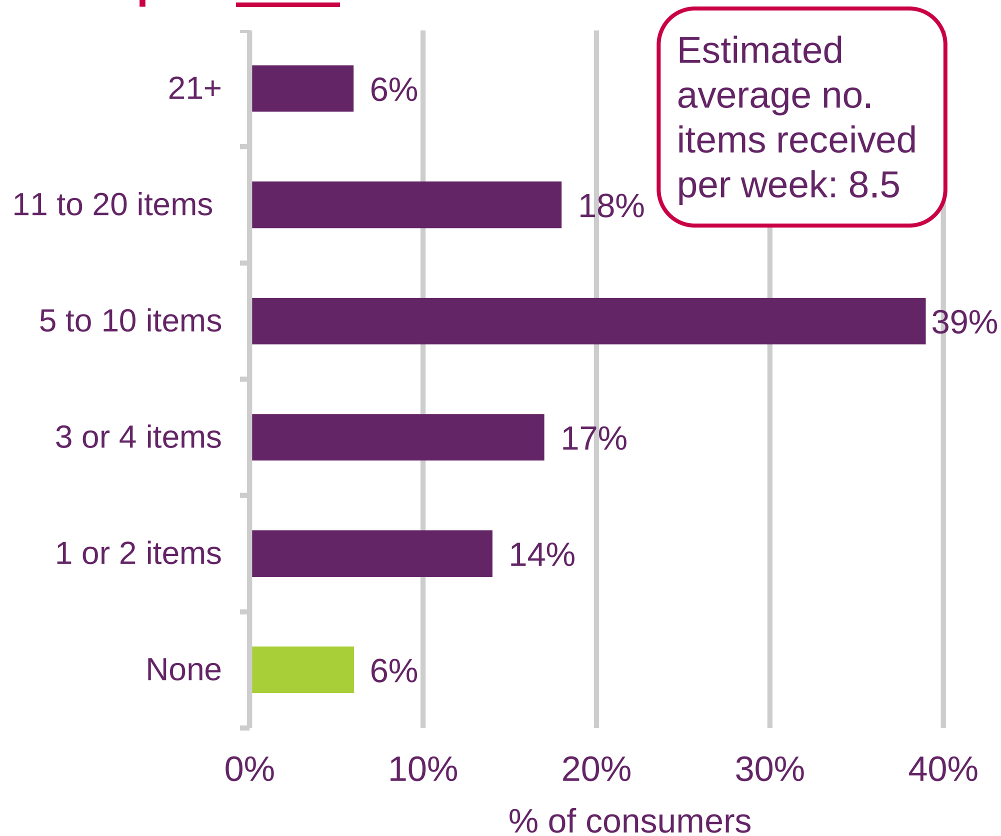
Figure 1.12

Approximate number of items sent and received by post

Claimed volume of items ***sent*** in the past ***month***



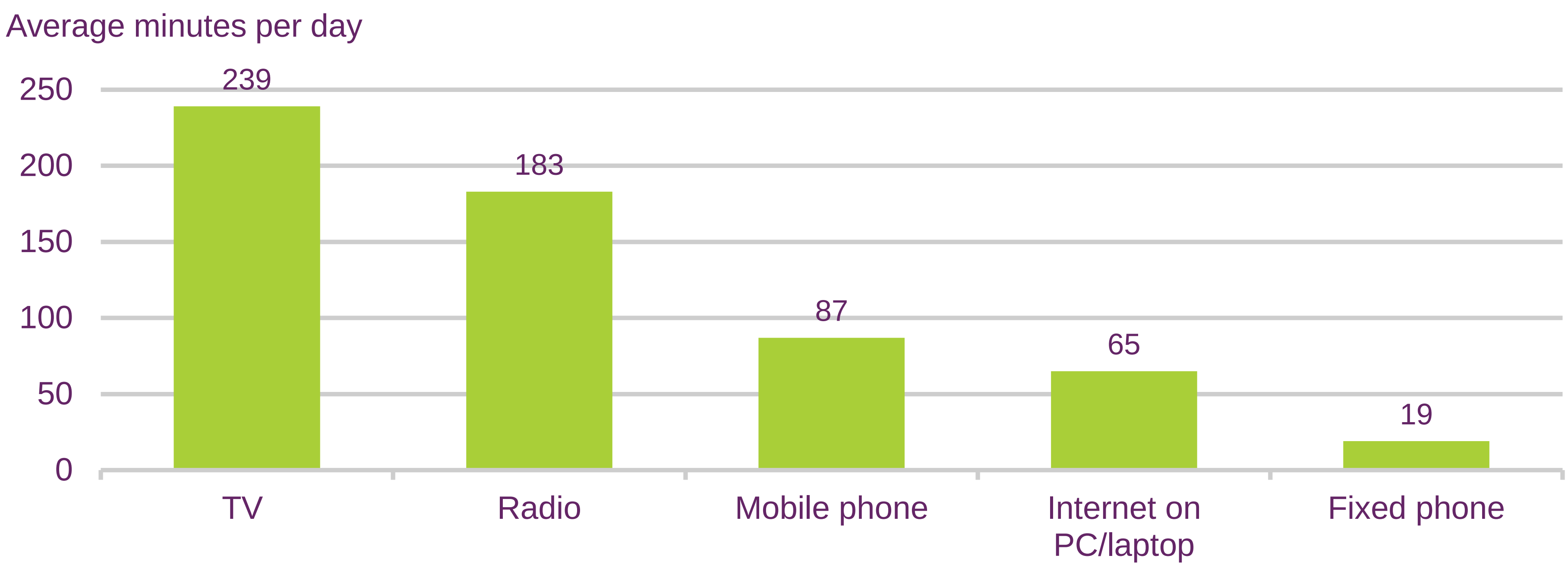
Claimed volume of items ***received*** in the past ***week***



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
Base: All respondents (n = 3557 adults 16+)
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?/ QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

Figure 1.13

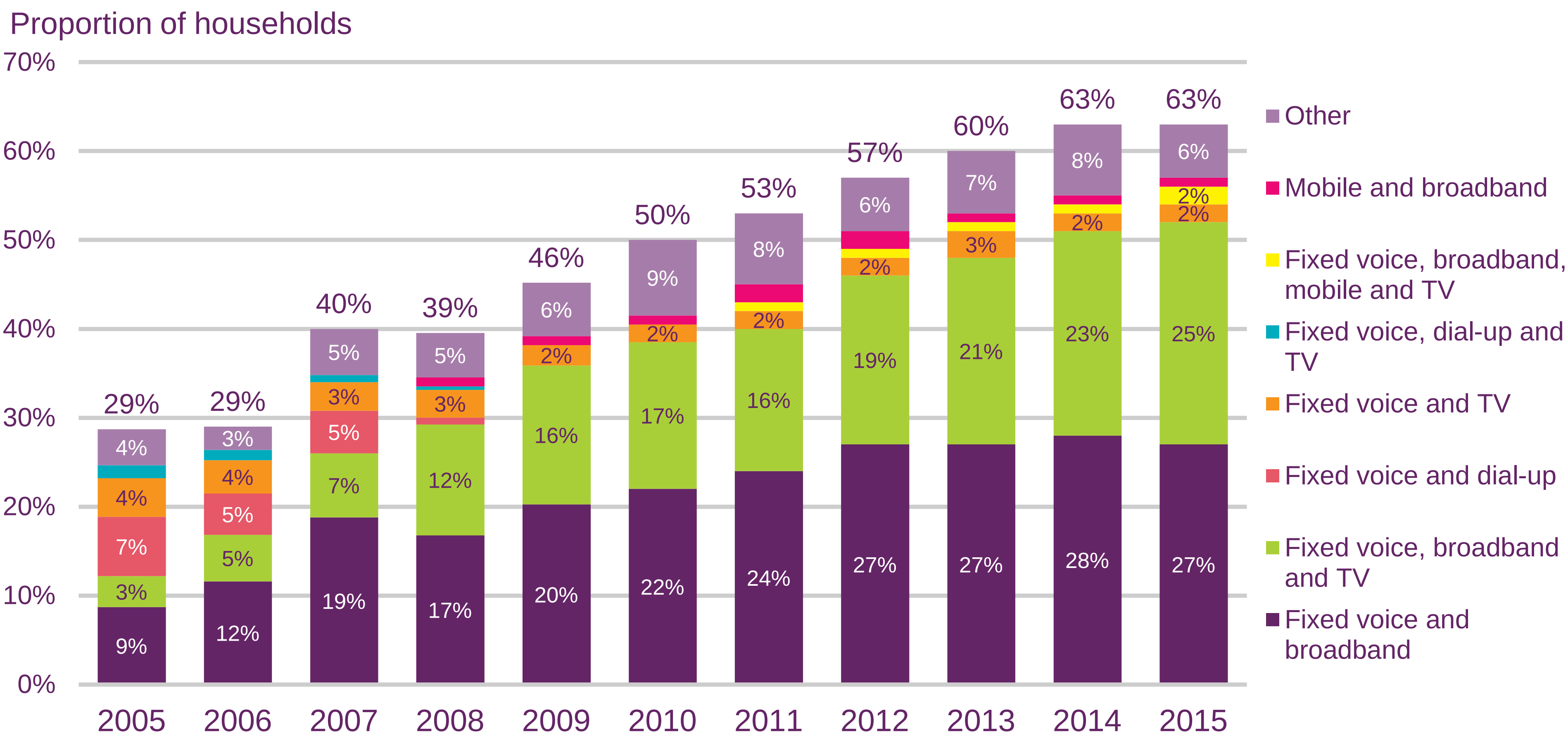
Average time per day spent using communications services: 2014



Source: BARB 2014 / RAJAR 2014 / comScore MMX, Home & work panel 2014 / Digital Day 2014
Base: TV: Average minutes per individual aged 16+ in TV households; Radio: All radio listeners aged 15+; comscore: Total audience, Individuals online in month on desktop/laptop age 15+; Digital Day: mobile phone / fixed phone: Total summed relevant activity minutes (weighted) / weighted base / 7, 15+
Note: TV data throughout the rest of the CMR refers to individuals aged 4+
Note: comScore data throughout the rest of the CMR refers to individuals 6+

Figure 1.14

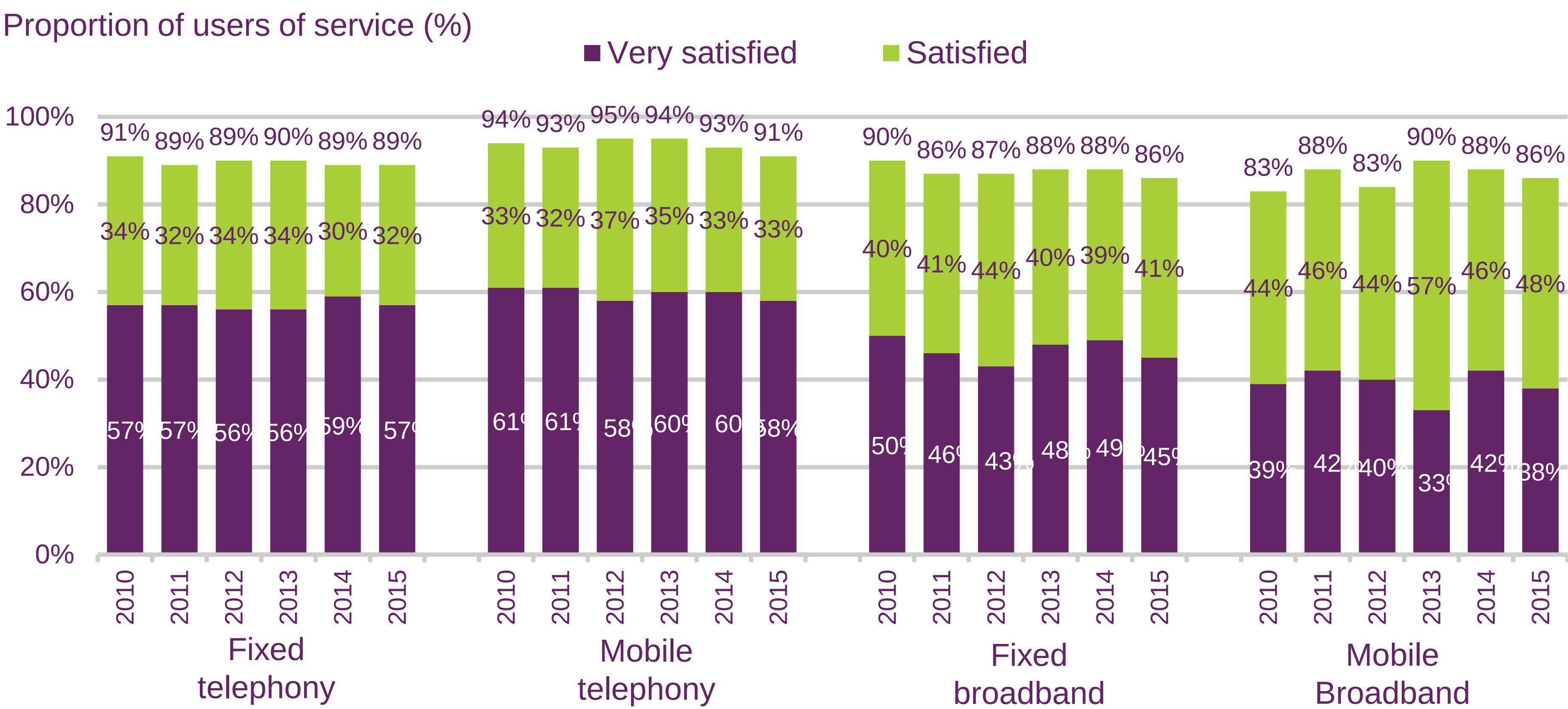
Reported take-up of bundled services



Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756)
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?

Figure 1.15

Overall satisfaction with communication services



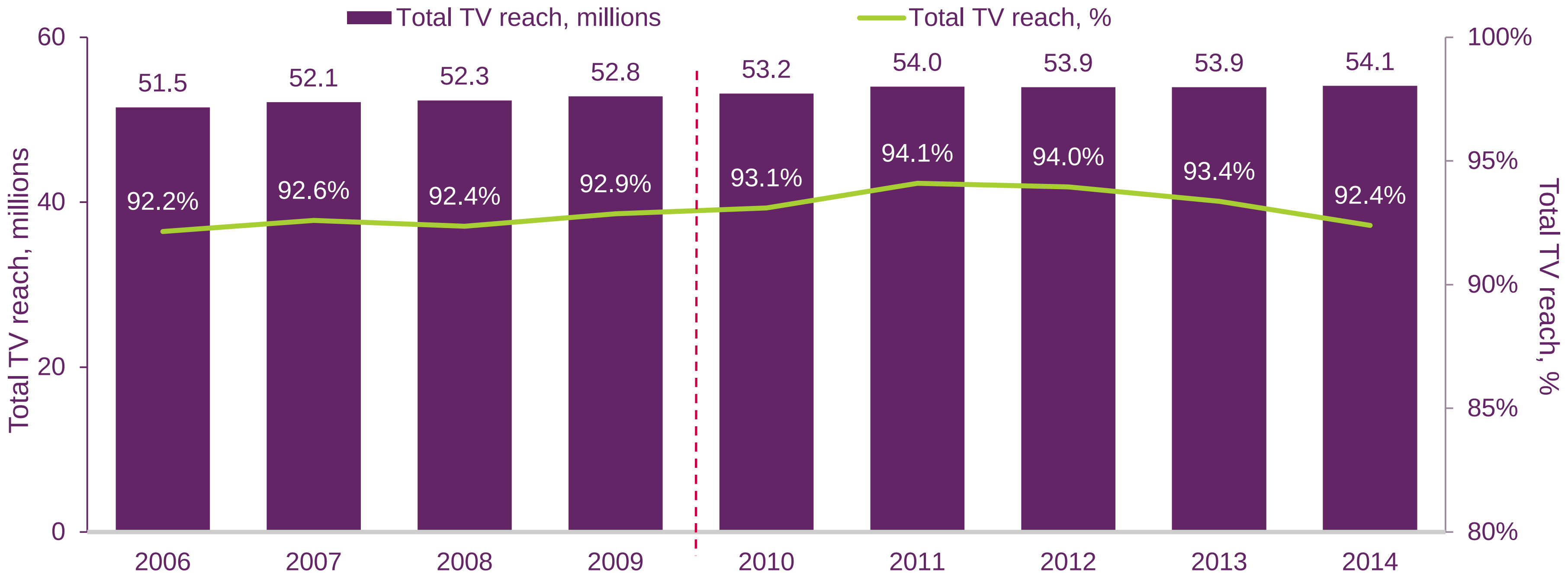
Source: Ofcom Technology Tracker. Data from Quarter 1 2010-2013, Wave 1 2014-2015
Base: All adults aged 16+
Note: Shows the proportion of users with each service, includes only those who expressed an opinion.
Q: Thinking about your home phone/ mobile phone/ fixed broadband internet/ mobile broadband internet service only, please say how satisfied you are with the overall service provided by [main supplier]

Changes in TV viewing habits

Figure 1.16

Average weekly reach of total TV

Total TV reach, Individuals 4+ (15 min+)

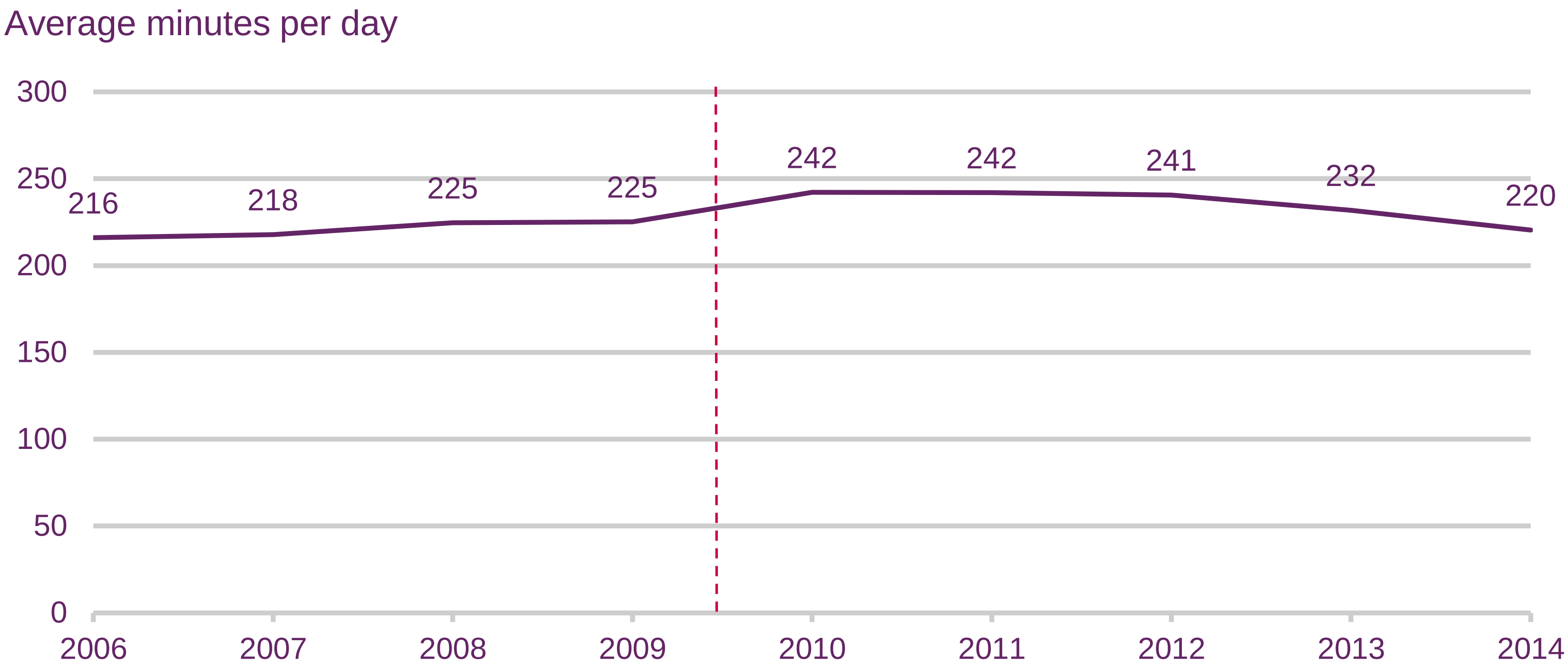


Source: BARB, individuals 4+, network, total TV. Reach criterion= 15 consecutive minutes of viewing at least once in the average week. Full weeks used.

Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Figure 1.17

Average minutes of broadcast TV viewing per person per day



Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).Average minutes of broadcast TV viewing per day declined by 11 minutes year on year, although values appear not to equate to 11 minutes in the chart due to rounding.

Figure 1.18

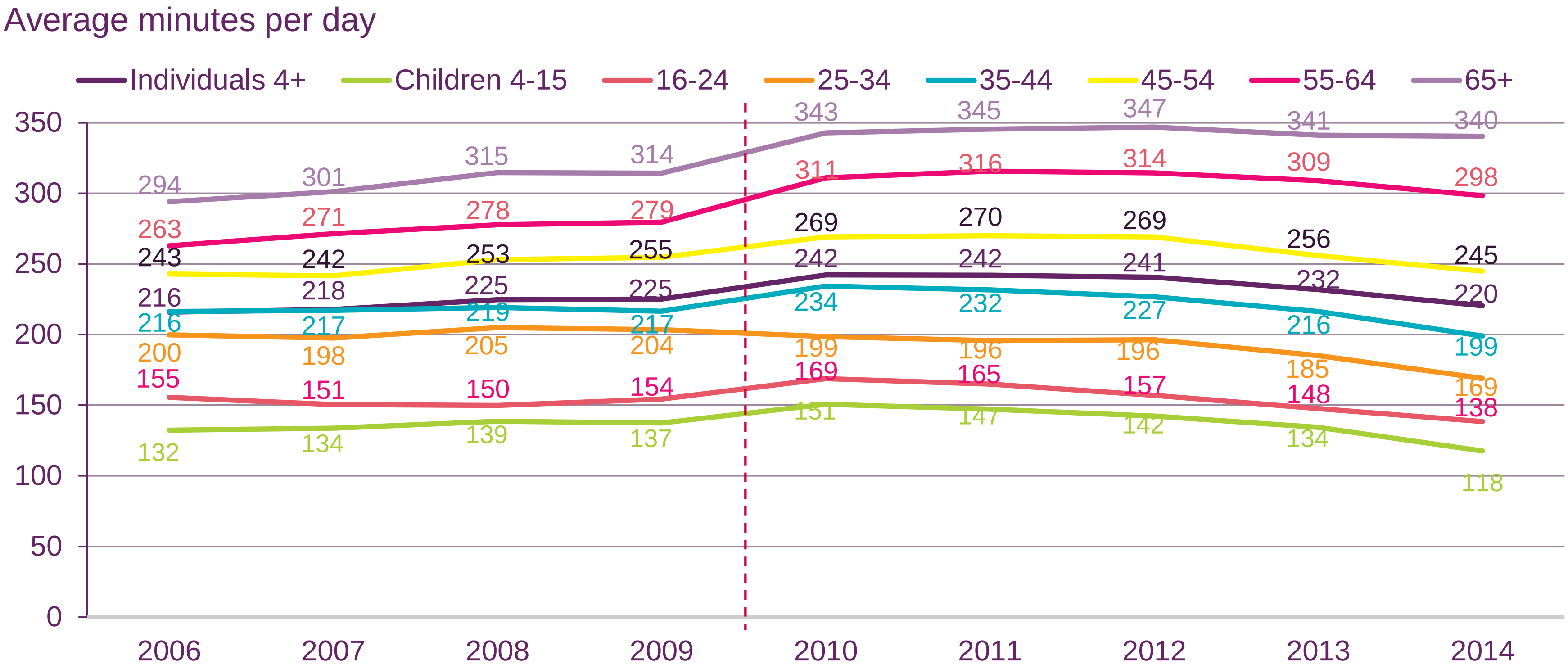
Change in average minutes per day of broadcast TV viewing by age group, total TV: 2013-2014

Audience	Change in average minutes of viewing/day: 2013-2014	% change in average minutes of viewing/day: 2013-2014
All individuals aged 4+	11 minutes	-4.9%
Children 4-15	**17 minutes**	**-12.4%**
16-24	**9 minutes**	**-6.2%**
25-34	**16 minutes**	**-8.8%**
35-44	**17 minutes**	**-8.0%**
45-54	11 minutes	-4.4%
55-64	10 minutes	-3.4%
65+	1 minute	-0.3%

Source: BARB, network, total TV. Average minutes of viewing/ day.
*Note: **Bold text** in table indicates an above average decline.*

Figure 1.19

Average minutes per day of broadcast TV viewing by age group, total TV

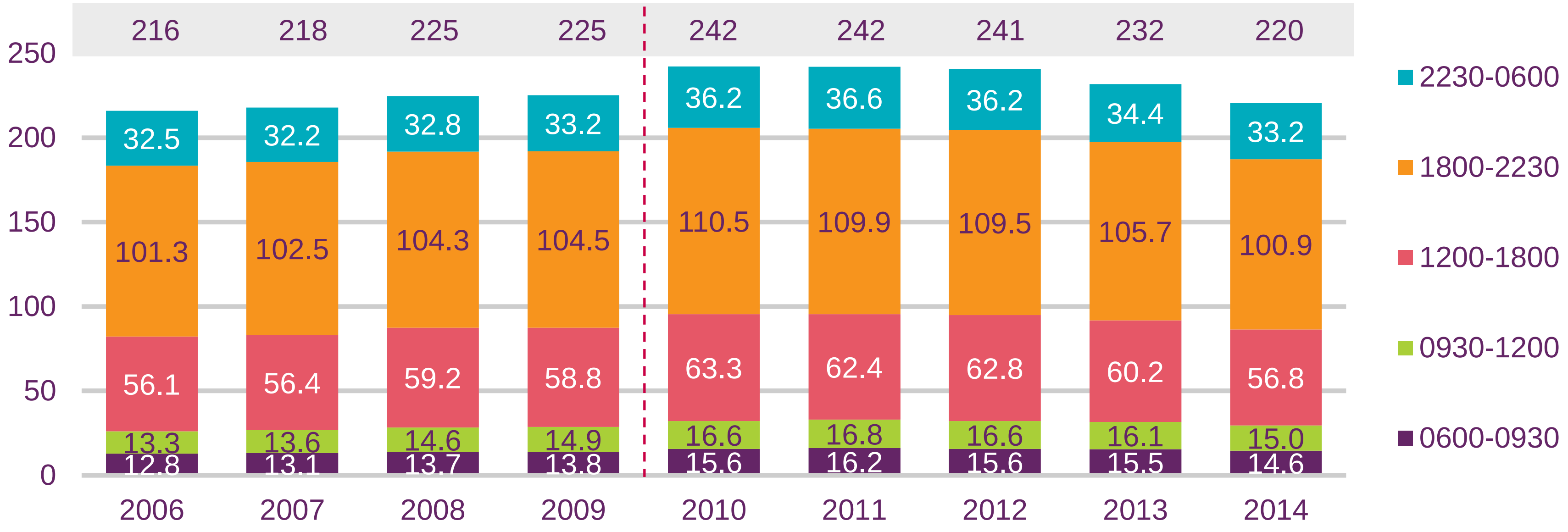


Source: BARB, network, total TV. Average minutes of viewing/day.
New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Figure 1.20

Average minutes of viewing per day, total TV: by day part

Average minutes per day

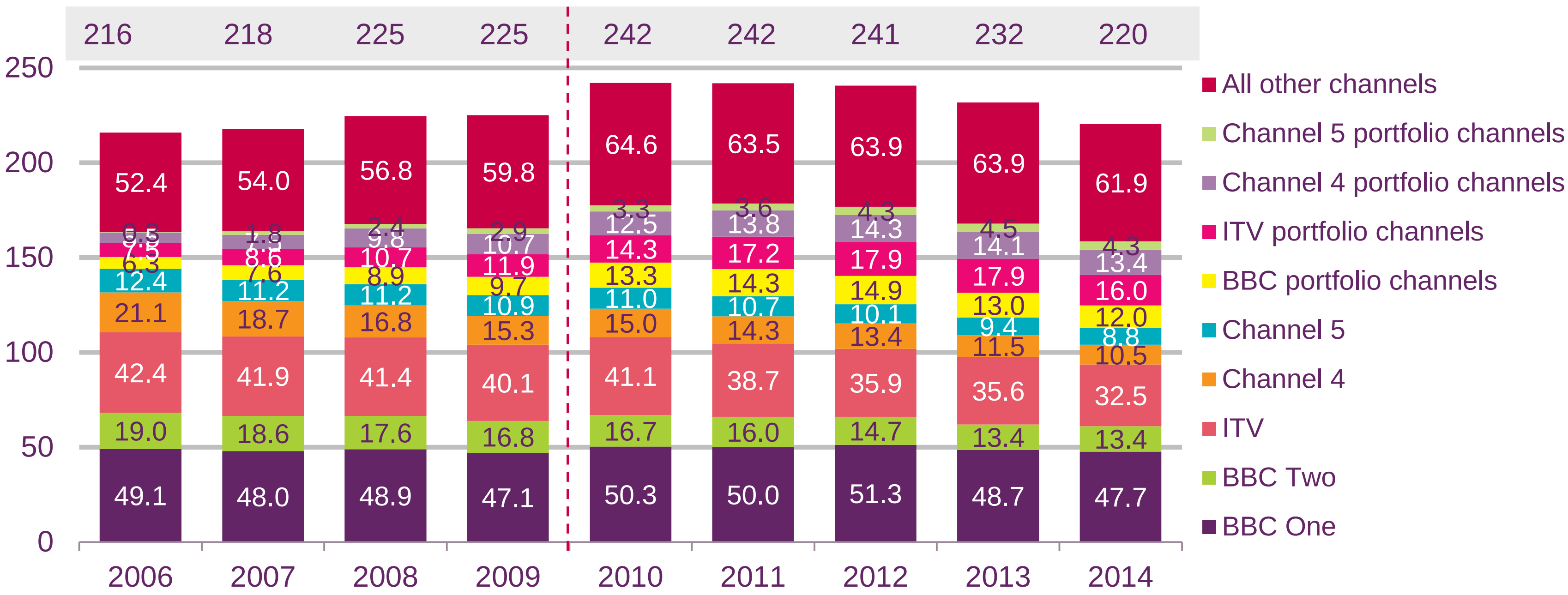


Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Figure 1.21

Average minutes of viewing per day, total TV: by channel group

Average minutes per day



Source: BARB, individuals 4+, network, total TV. *Average minutes of viewing/day.*
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

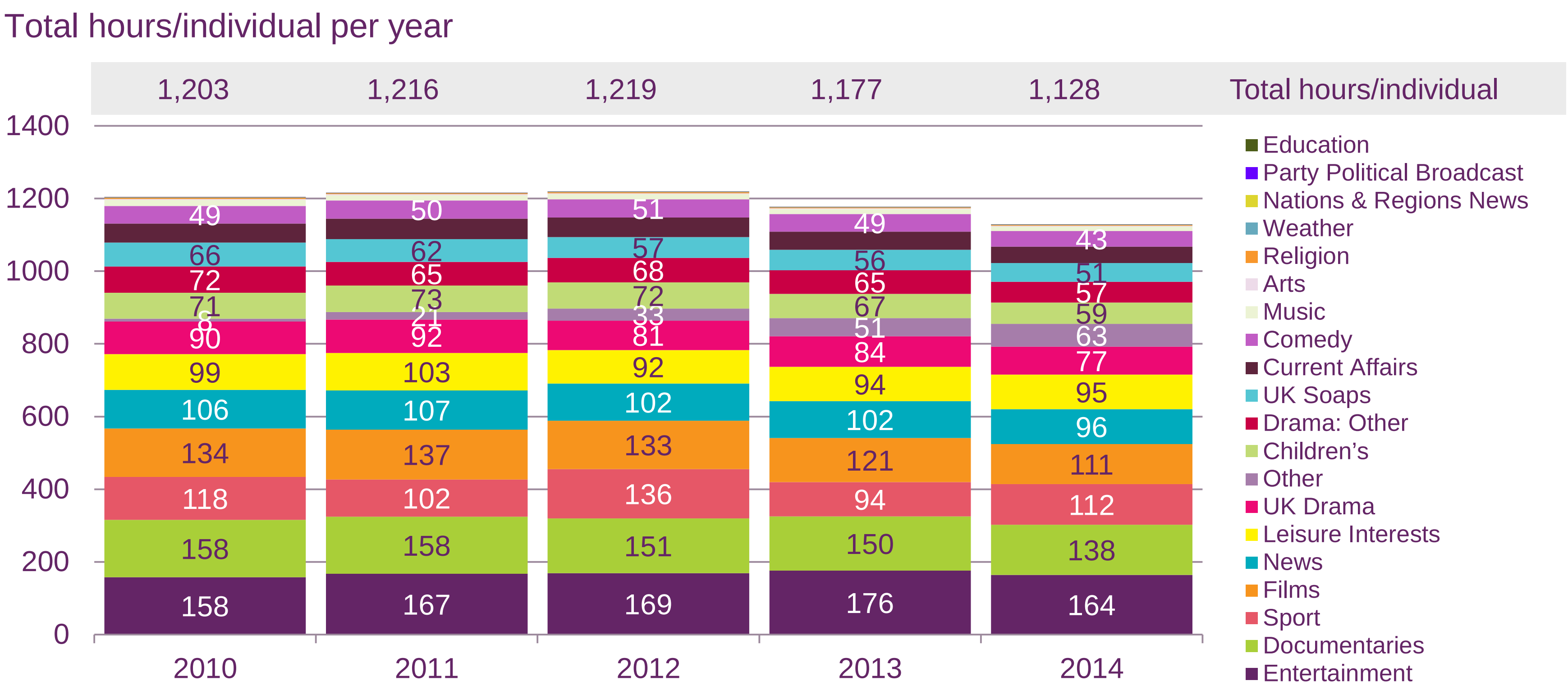
Figure 1.22

Average minutes of viewing/day, total TV: by activity

Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Figure 1.23

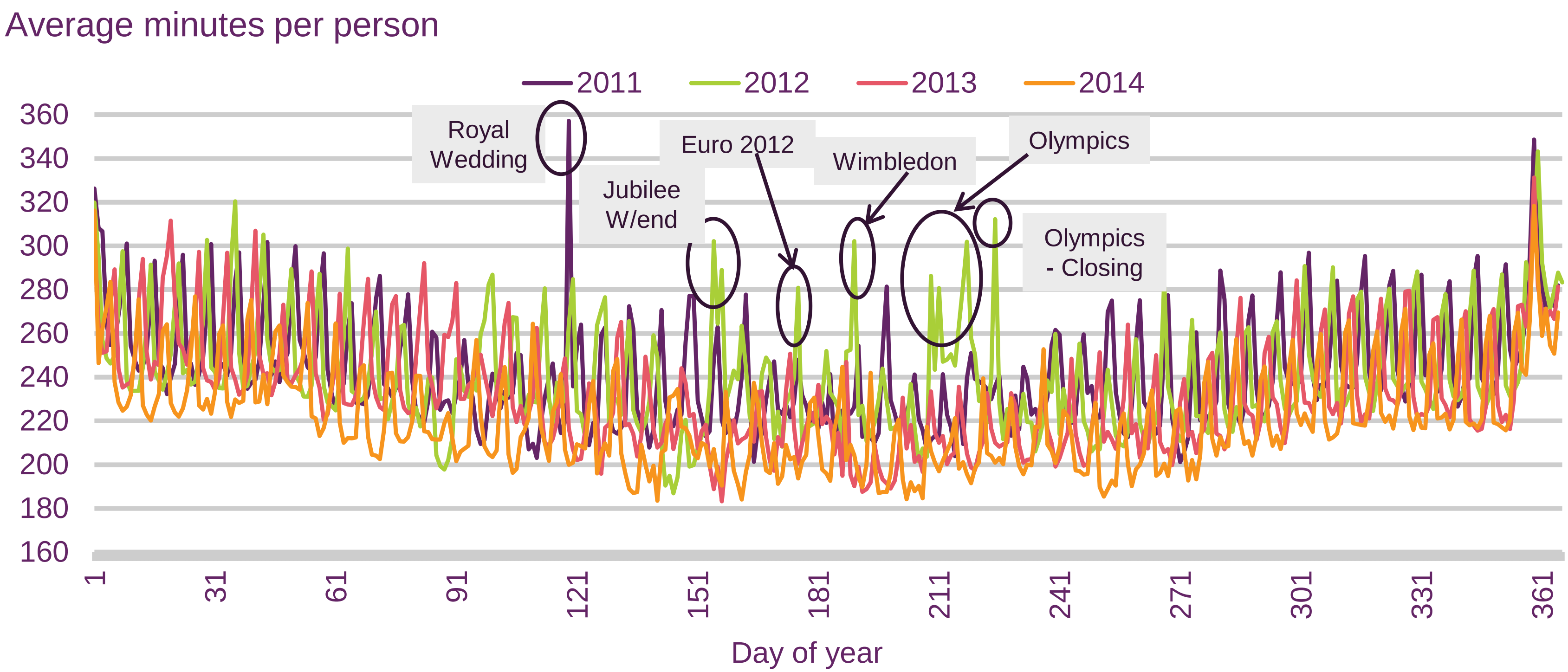
Range of viewing by genre across all channels, all individuals: 2010-2014



Source: BARB, individuals 4+, network programming based on 4+ area filter, total TV. Total hours of viewing/year.
Note: There have been very large increases in total viewing hours to the 'other: new programme' genre over the last few years (from 33.1 hours of viewing per person in 2012 to 62.6 hours in 2014. Programmes that may fall in other genres may therefore be coded as other: new programme and this should be considered in any genre-based analyses.

Figure 1.24

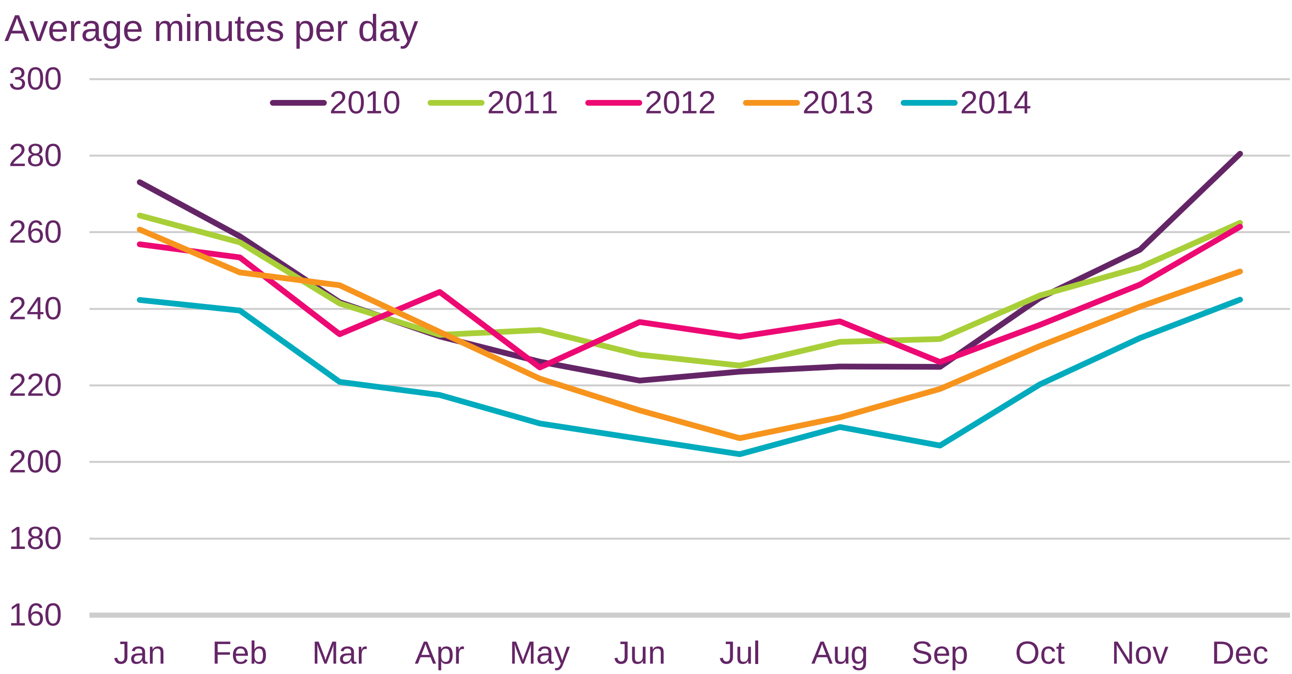
Average minutes of viewing by day, total TV: 2011-2014



Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.

Figure 1.25

Average minutes of viewing by month: 2010-2014

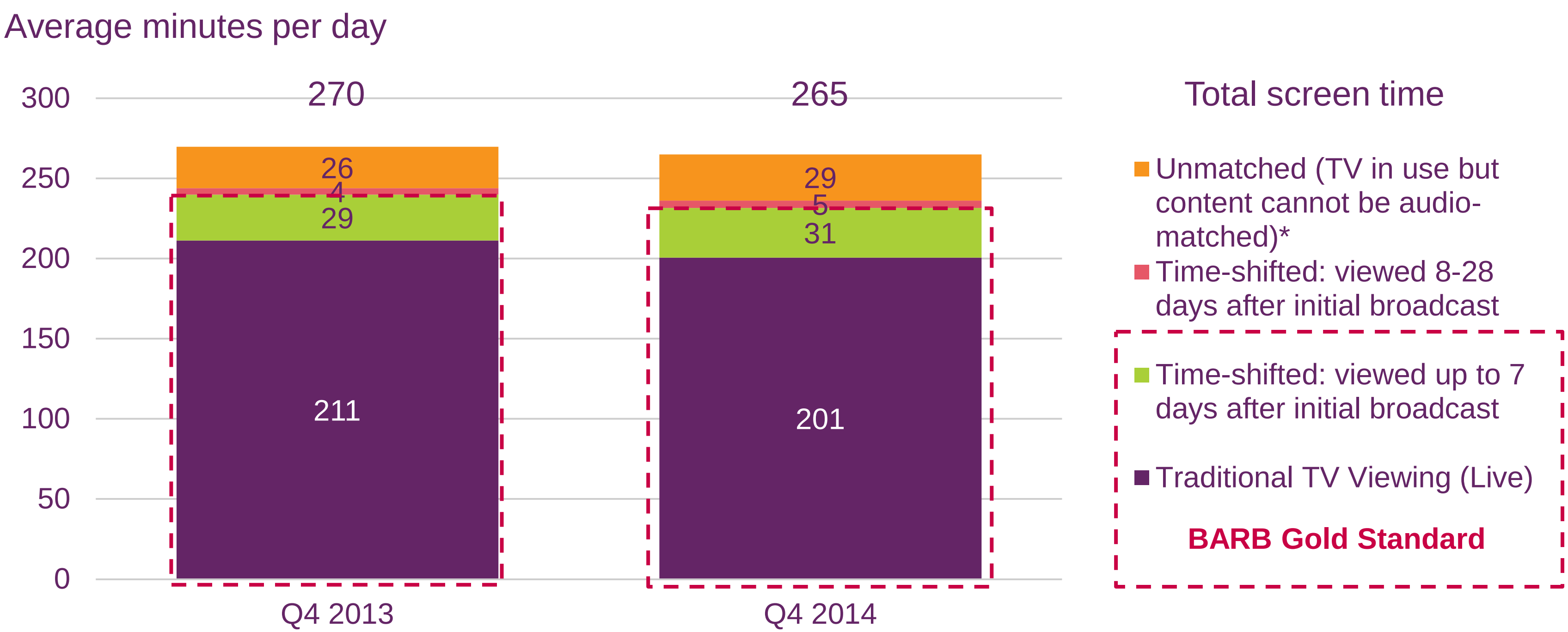


	% change: 2013-2014
Jan-Dec	-4.9 (-11min)
Jan	**-7.1% (-18min)**
Feb	-4.0% (-10min)
Mar	**-10.3% (-25min)**
April	**-7.0% (-16min)**
May	**-5.3% (-12min)**
Jun	-3.5% (-7min)
Jul	-2.0% (-4min)
Aug	-1.2% (-3min)
Sep	**-6.7% (-15min)**
Oct	-4.4% (-10min)
Nov	-3.4% (-8min)
Dec	-3.0% (-7min)

Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/mont...
Note: i) **Bold text** in table indicates an above average decline. ii) New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution.

Figure 1.26

Average daily minutes of TV screen time, total TV: by activity type

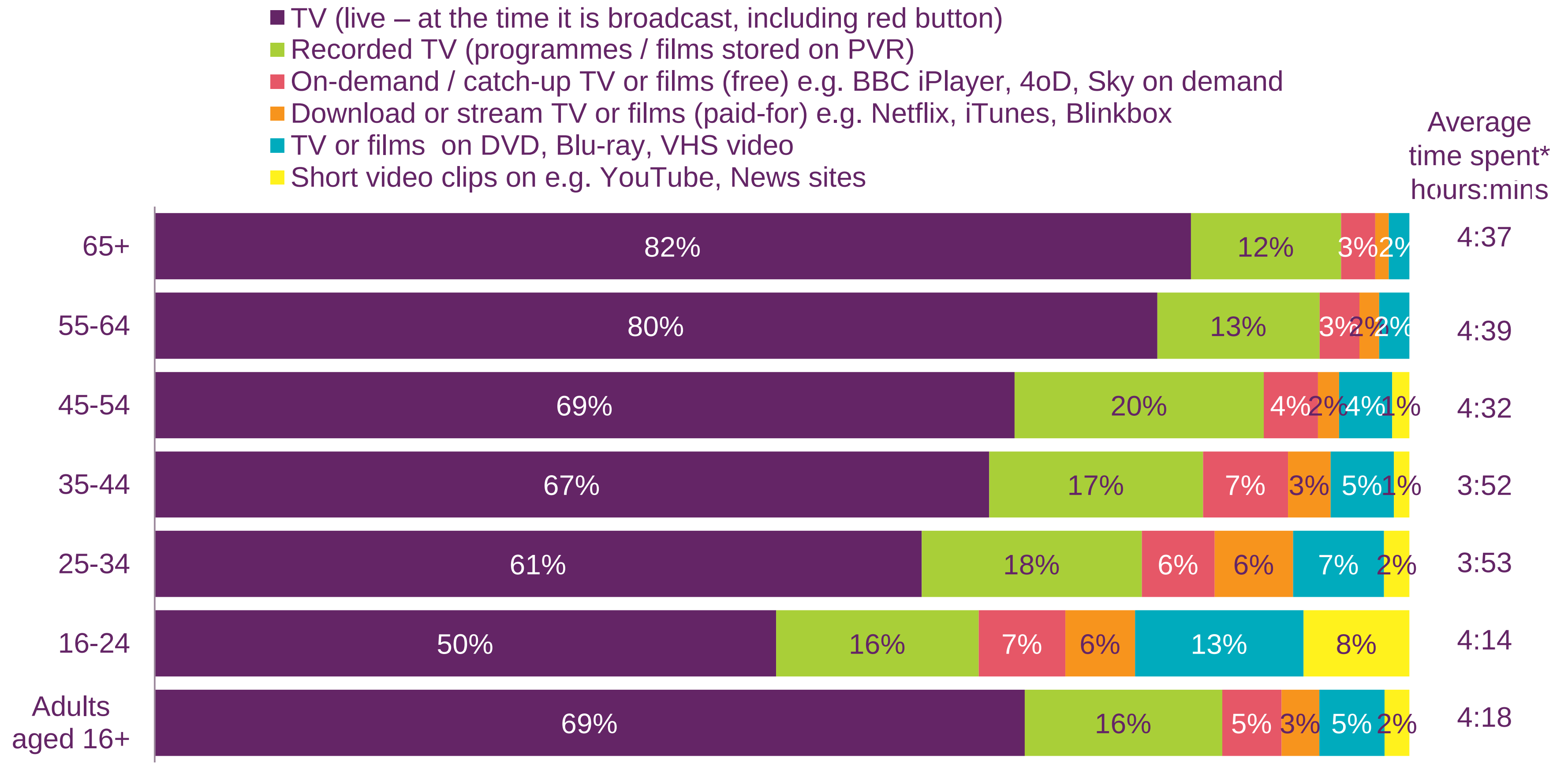


Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
*Note: Unmatched = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/Box sets/archives, SVOD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013. At the time of writing, it is not possible to analyse unmatched content further by the type of device used. Dotted line marks difference between BARB gold standard industry data and the 8-28 day time-shifted and unmatched viewing.

Developments in viewing beyond traditional television

Figure 1.27

Proportion of watching activities, % of total viewing time, by age



Source: Ofcom Digital Day 7-day diary 2014

Base: All aged 6-11 (186), 11-15 (173), 16-24 (101), 25-34 (225), 35-44 (348), 45-54 (400), 55-64 (311), 65+ (259). *Average time spent is the total average daily time spent watching media, including simultaneous activity

Figure 1.28

Selected on-demand and short-form service developments

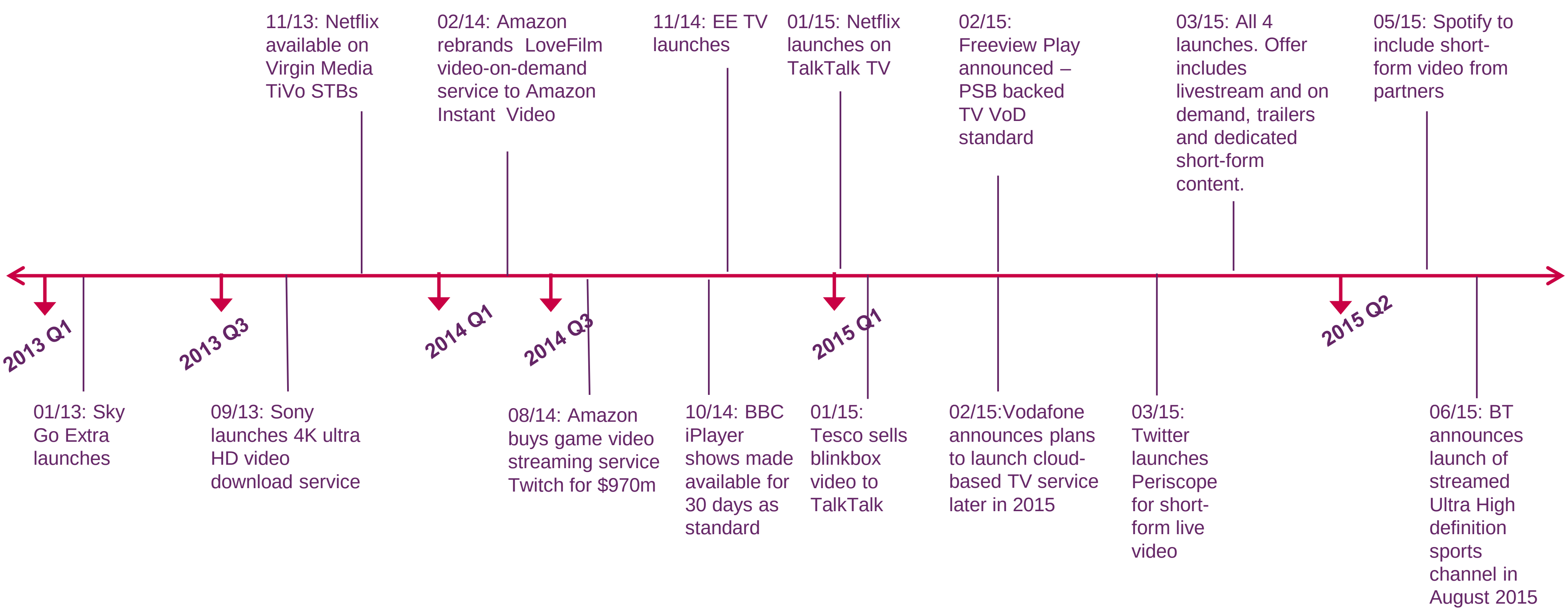
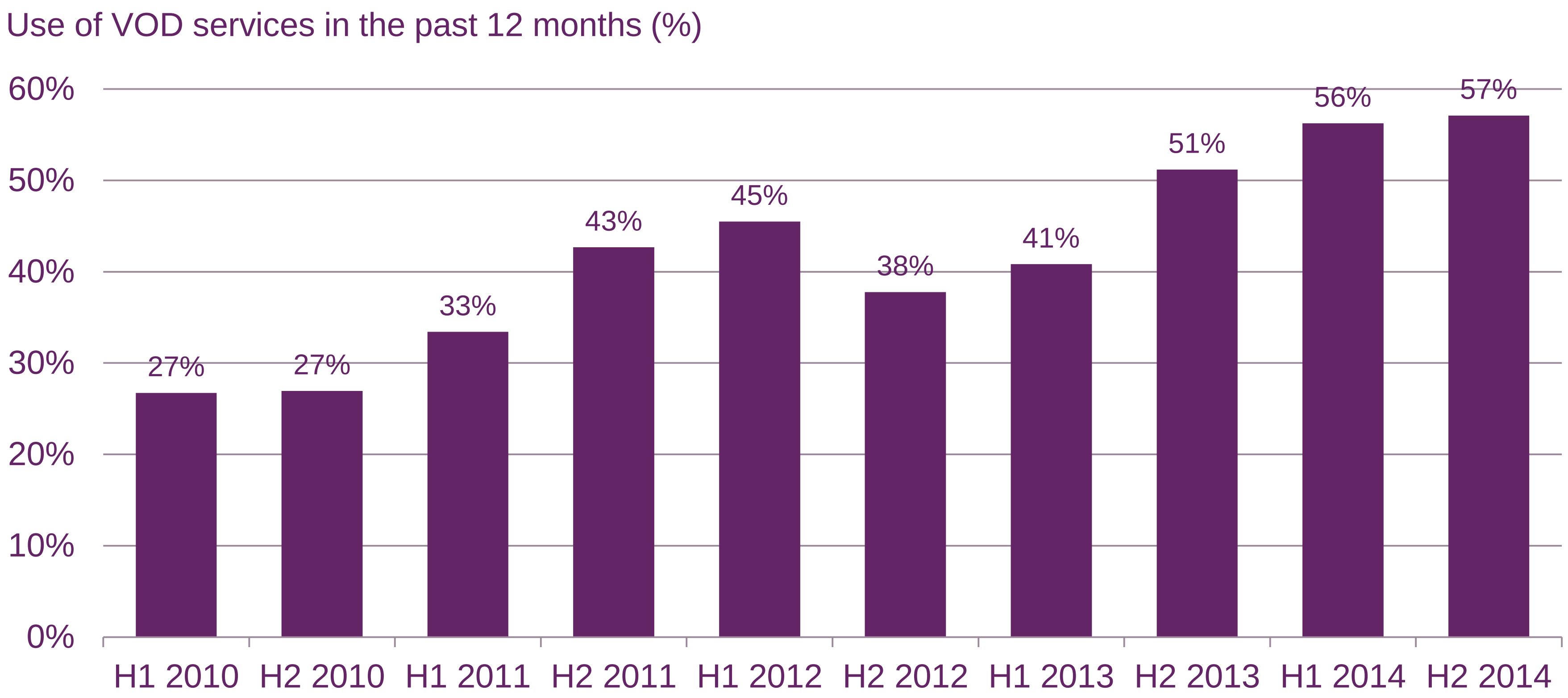


Figure 1.29

Use of VoD services in the past 12 months

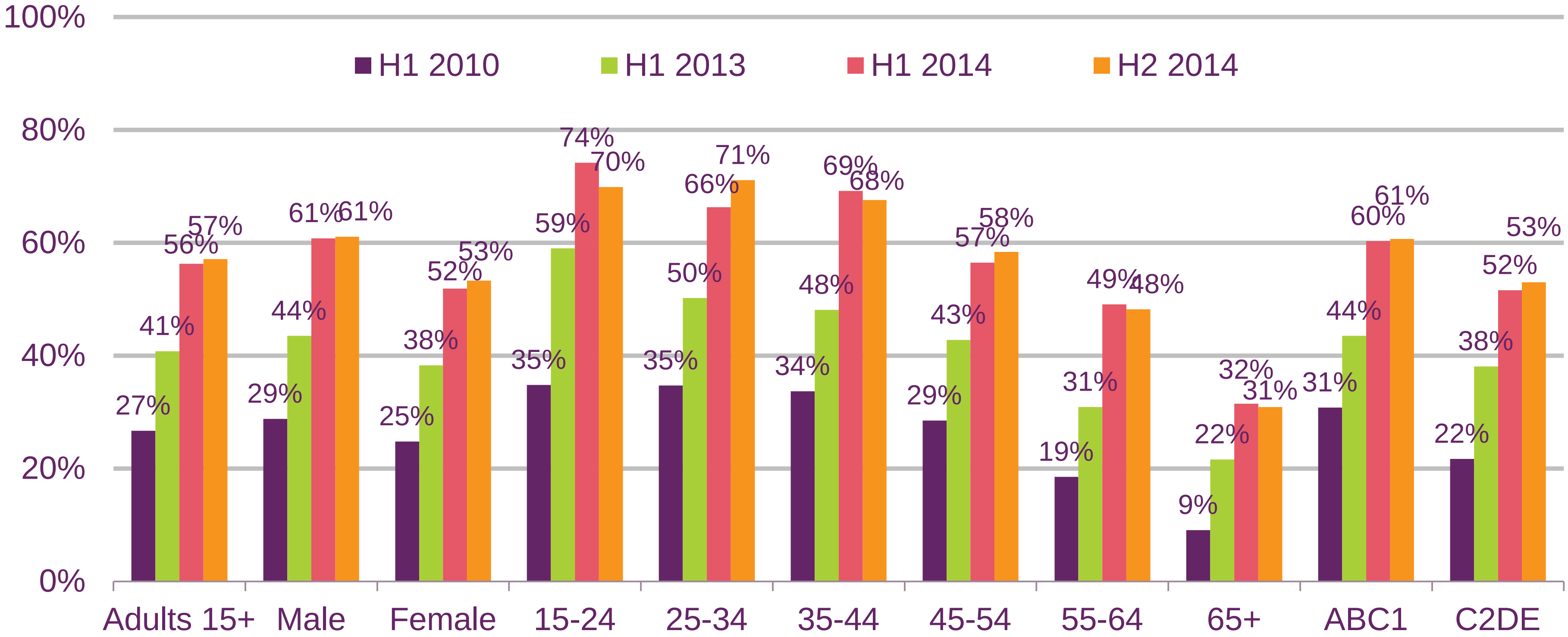


Source: Kantar Media - TGI. Base: GB adults aged 15+. H1 2010 n=12226, H2 2010 n=11794, H1 2011 n=12602, H2 2011 n=12915, H1 2012 n=11098, H2 2012 n=12495, H1 2013 n=11853, H2 2013 n=12570, H1 2014 n=11657, H2 2014 n=12849

Figure 1.30

Reach of VoD services, by age, gender and socio-economic group

Proportion watching VoD services in past 12 months (%)

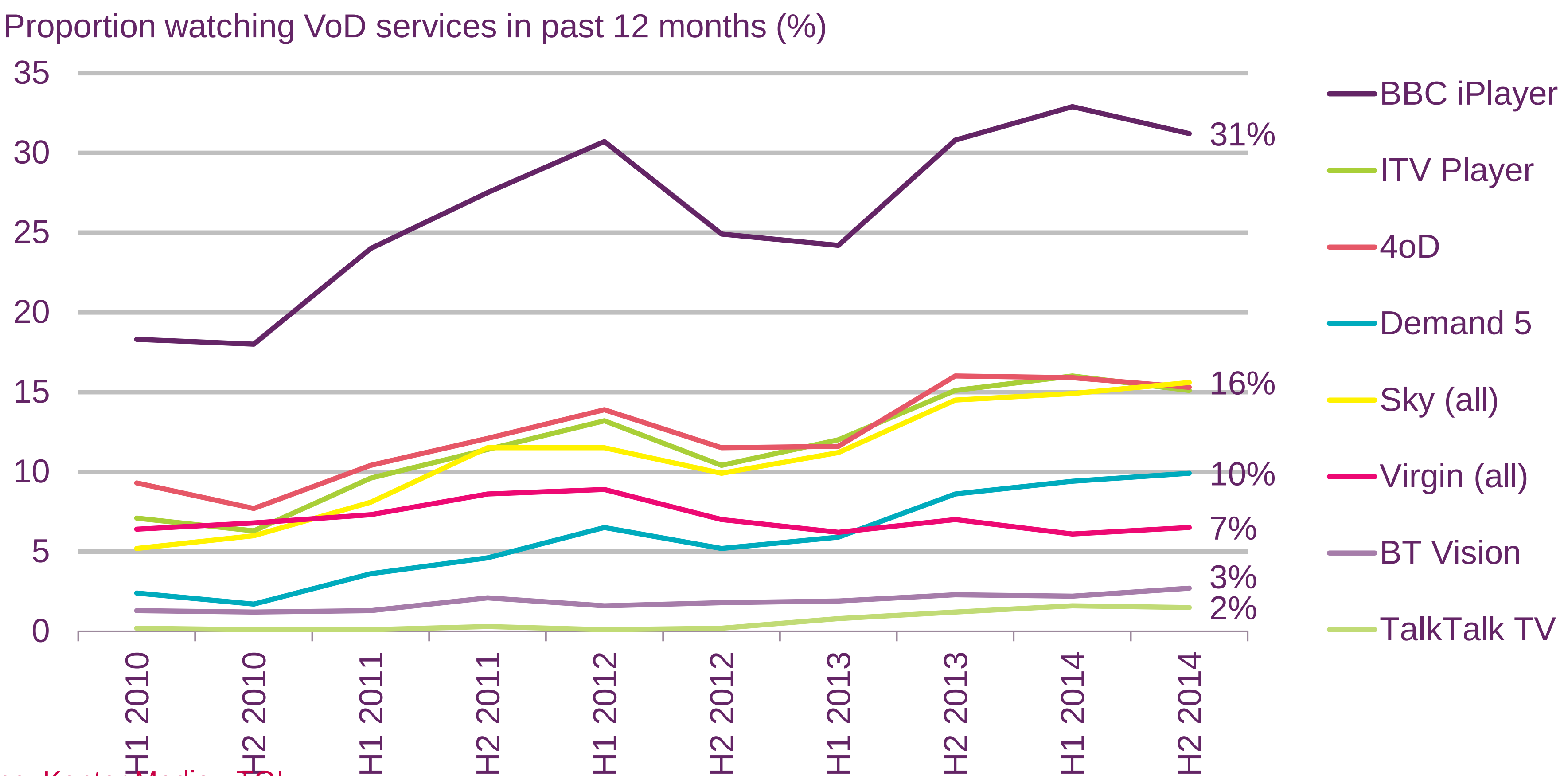


Source: Kantar Media - TGI.

Base: GB adults aged 15+. H1 2010 n=12226, H1 2013 n=11853, H1 2014 n=11657, H2 2014 n= 12849.

Figure 1.31

Reach of selected VoD services over time

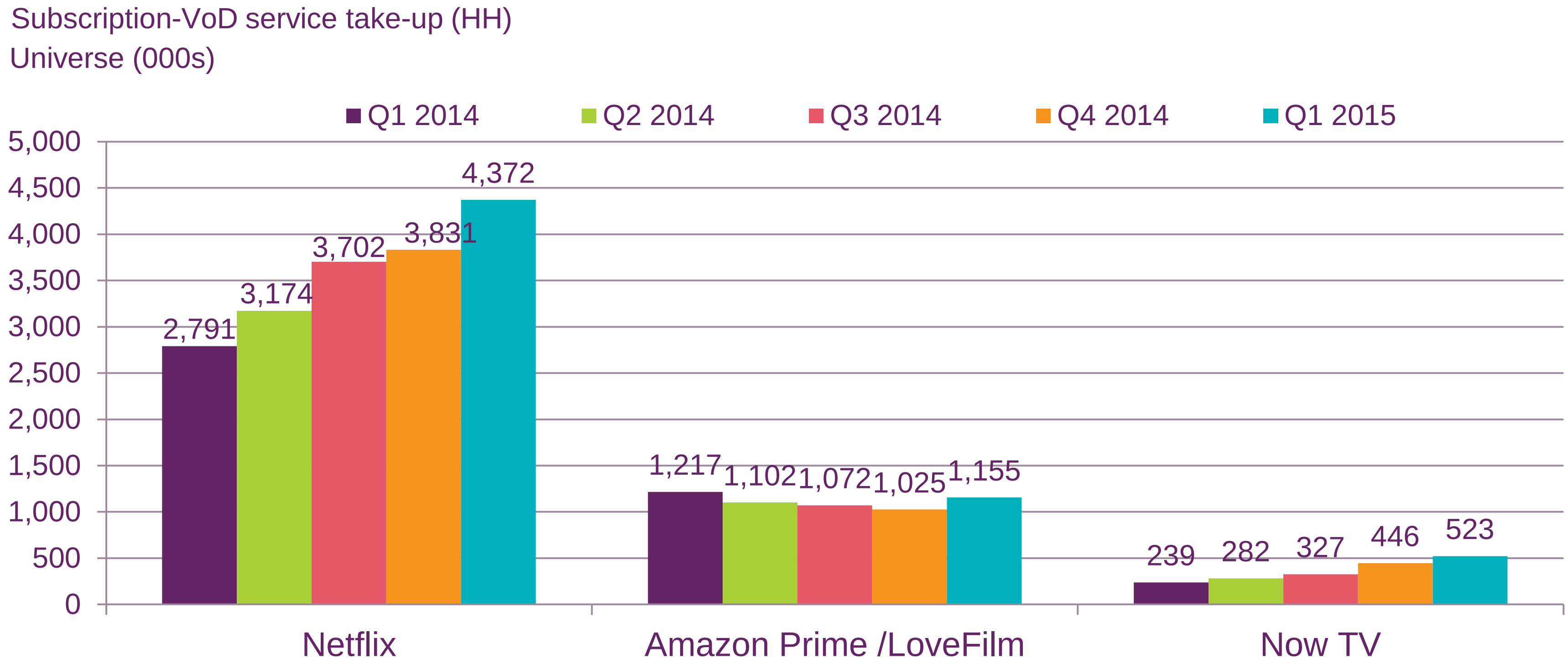


Source: Kantar Media - TGI

Base: GB adults 15+, all devices. Reach refers to use in previous 12 months H1 refers to January – June, H2 refers July – December

Figure 1.32

Selected subscription-VOD service take-up, by household

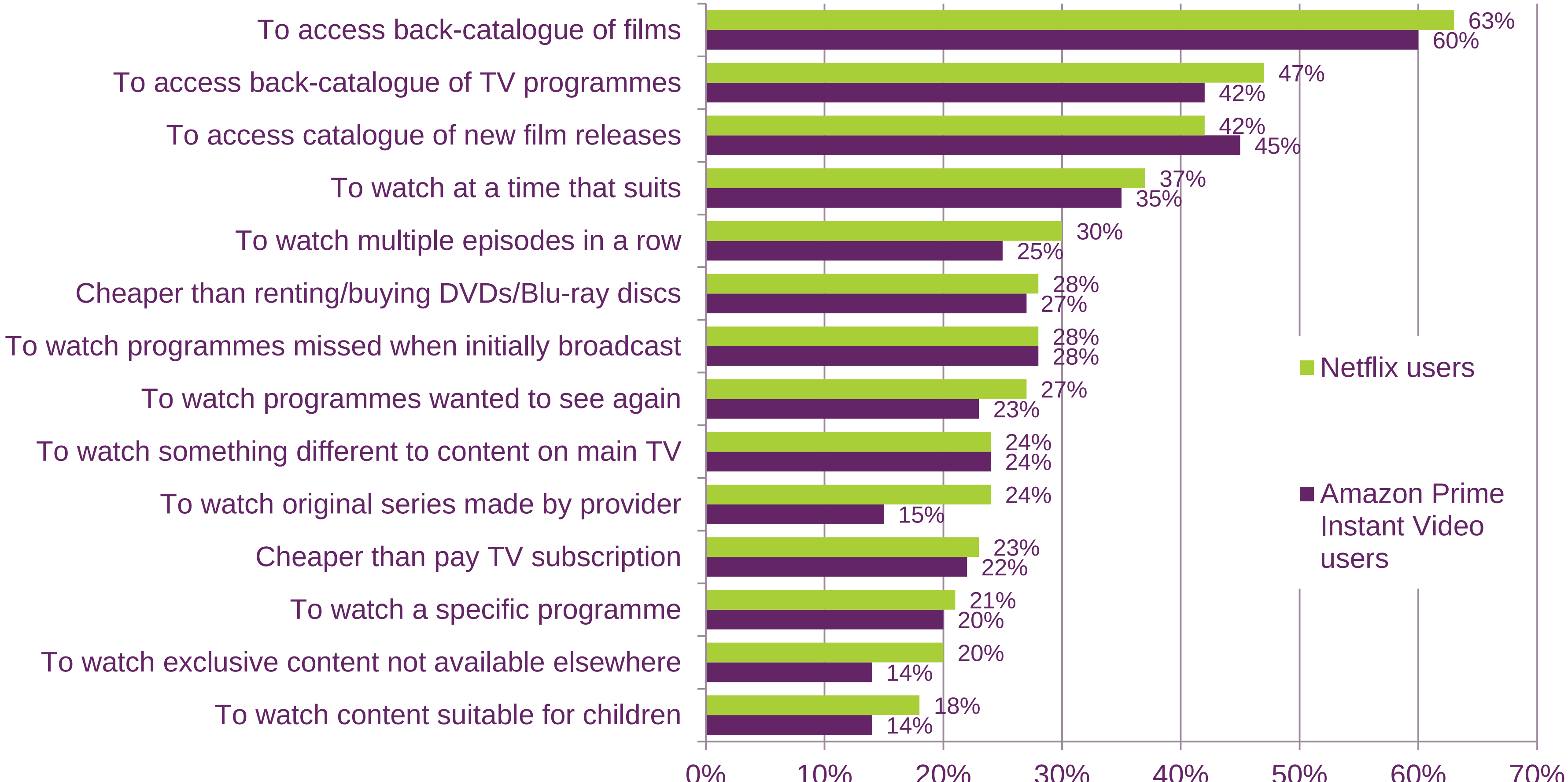


Proportion of all households	Netflix					Amazon Prime /LoveFilm					Now TV				
	10%	12%	14%	14%	16%	4%	4%	4%	4%	4%	1%	1%	1%	1%	2%

Source: BARB Establishment Survey Q1 2014 – Q1 2015
Q – Do you or anyone in your household, subscribe to any of the following…?

Figure 1.33

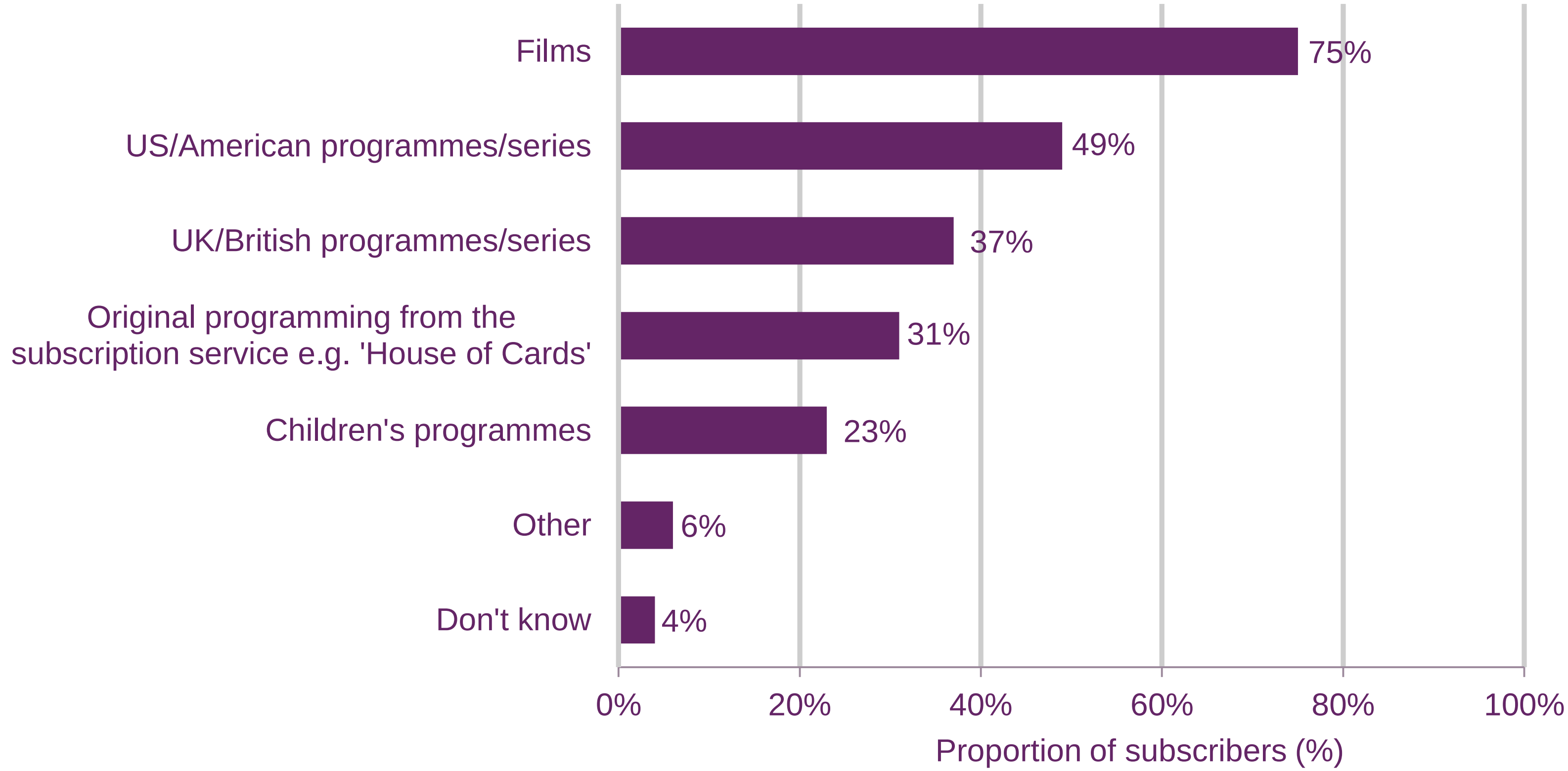
Reasons for using Amazon Prime Instant Video / Netflix



Source: GfK SVoD Tracker. Base: All Amazon Prime Instant Video / Netflix subscribers

Figure 1.34

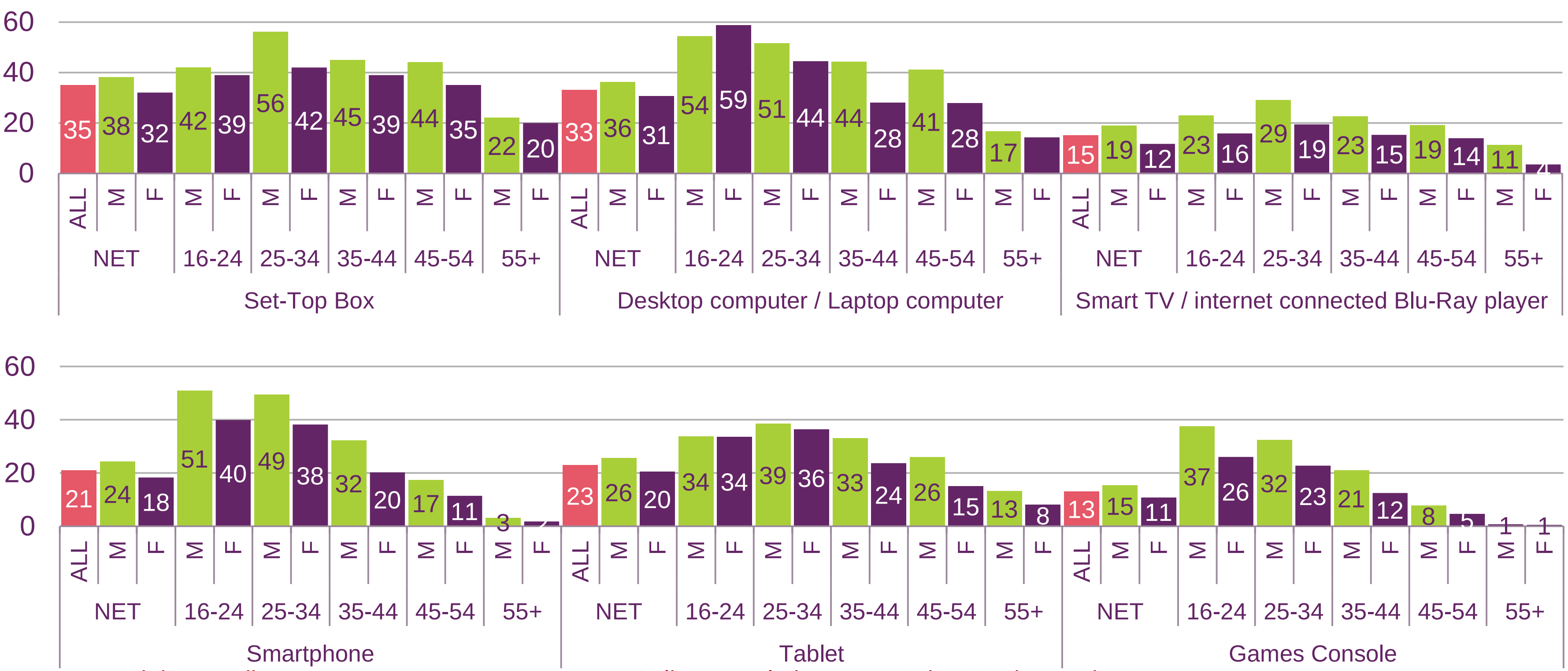
Programmes watched, among subscribers to on-demand services with a monthly subscription



Source: GfK NOP omnibus, April 2015
Base: All who have subscription to services (402) QH, Which of these types of programmes do you or your family watch through (name/s of on-demand subscription services).

Figure 1.35

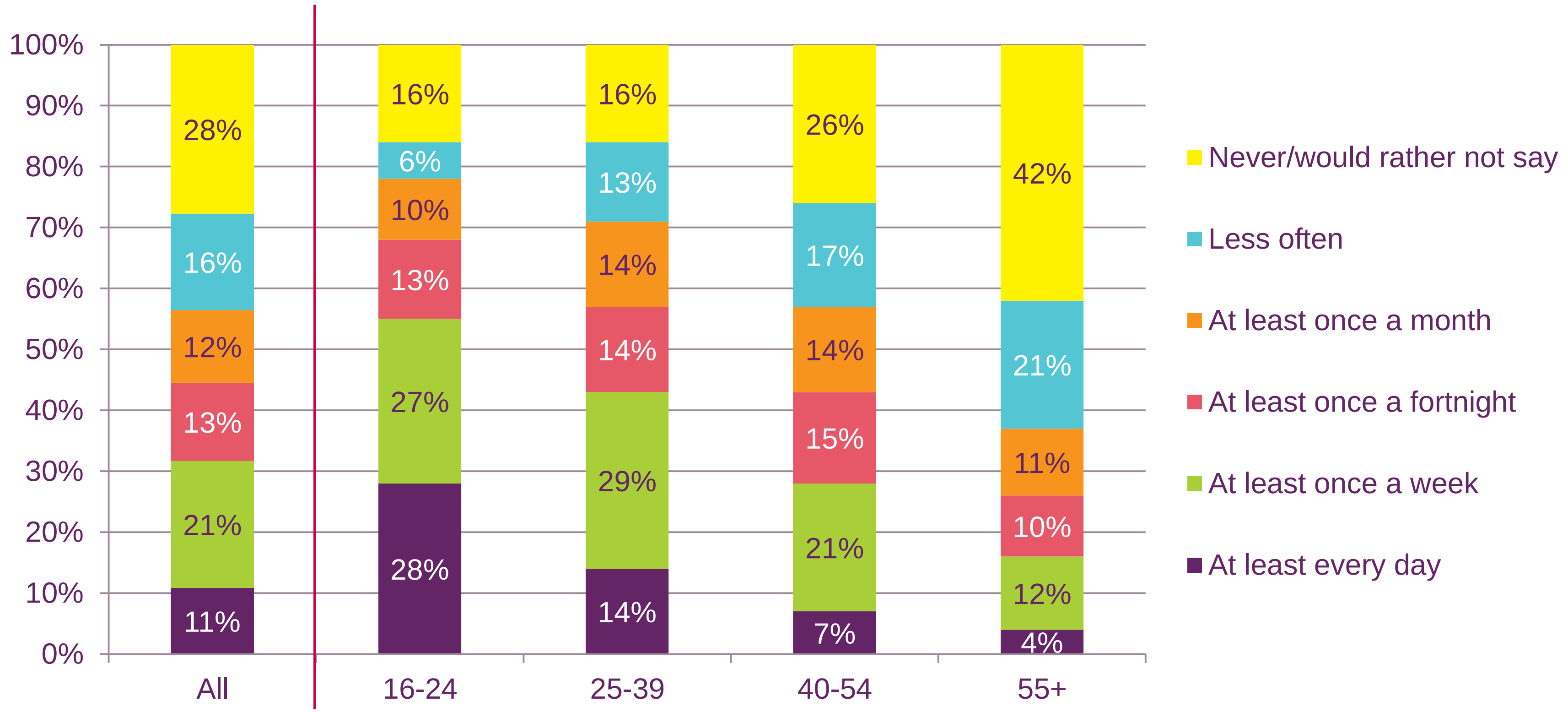
Device used to watch catch-up and video on-demand services at least monthly



Source: Decipher MediaBug – Wave 6 Report. Base: UK Online Population Wave 6 (n=3088), March 2015
VOD / DTO refers to the following services: BBC iPlayer, ITV Player, 4oD, Demand 5, Sky Go, Netflix, Amazon Instant Video, Blinkbox.com, Now TV, Virgin TV Anywhere, Picturebox Films, Viewster, Channel Films, iTunes, Virgin Media Online Movies, Xbox Video, Playstation Video Store, Film 4oD, MUBI, Sainsbury's Entertainment, UKTV Play, Google Play, Curzon Home Cinema, Wuaki.tv, Sky Store and any video on demand service accessed through a set top box.

Figure 1.36

Viewing to short-form video clips

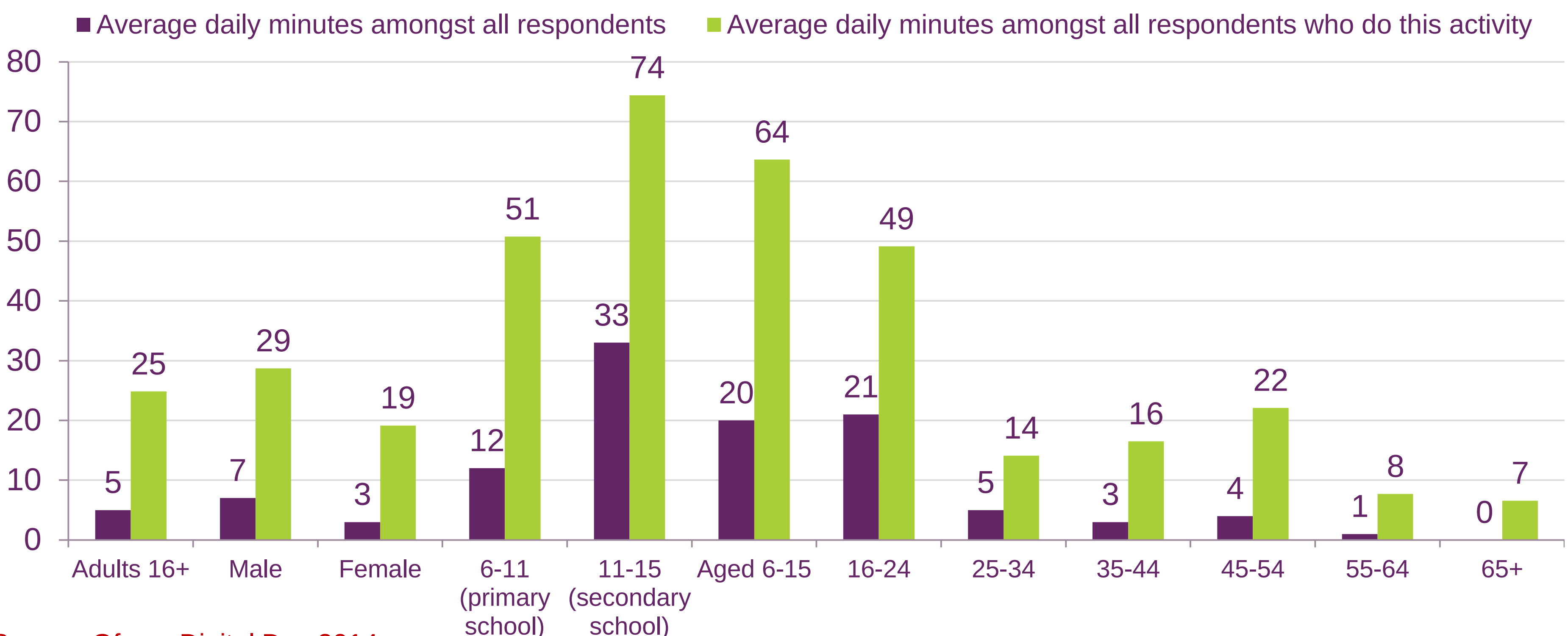


Source: Ofcom Adult Media Literacy Tracker 2015
q20_13. Thinking of what you do online for your personal use, how often do you do the following? - Watch online or download short video clips such as music videos or comedy clips (such as on YouTube)

Figure 1.37

Daily minutes of viewing to short online video clips on sites such as YouTube and news and social media sites

Average daily minutes



Source: Ofcom Digital Day 2014

Figure 1.38

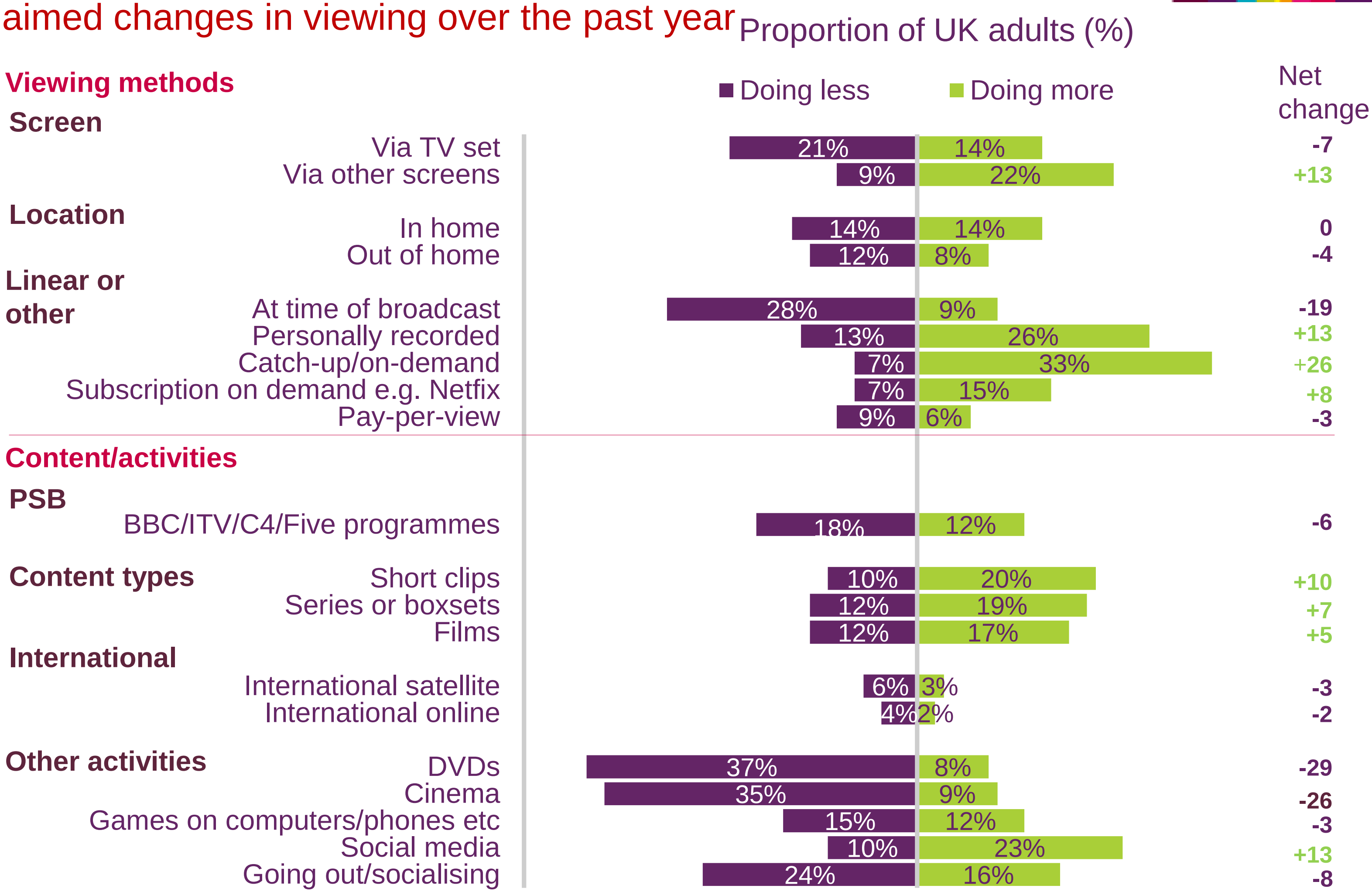
Sources ever used when looking for information online, by age

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Search engines	95%	97%	96%	95%	95%	92%	96%	88% ↓
Wikipedia	54%	60%	57%	58%	48%	52%	45% ↓	30% ↓
YouTube	47%	57% ↑	54%	55% ↑	43%	34% ↓	32% ↓	12% ↓
Online recommendations from friends	40%	46%	41%	49% ↑	35%	32% ↓	26% ↓	26% ↓
Websites with user reviews	39%	37%	42%	44%	36%	41%	33%	22% ↓
Reviews by critics/ journalists in articles in the wider media	30%	35%	29%	35%	27%	30%	20% ↓	19% ↓
Twitter	19%	30% ↑	27% ↑	22%	11% ↓	10% ↓	6% ↓	4% ↓

Source: Ofcom Media Literacy Tracker (Fieldwork carried out by Saville Rossiter-Base Oct-Nov 2014) IN46 Please think about when you want to look for information about something online? Which, if any, of these sources have you ever used to look for information online (prompted responses, multi-coded)

Figure 1.39

Claimed changes in viewing over the past year

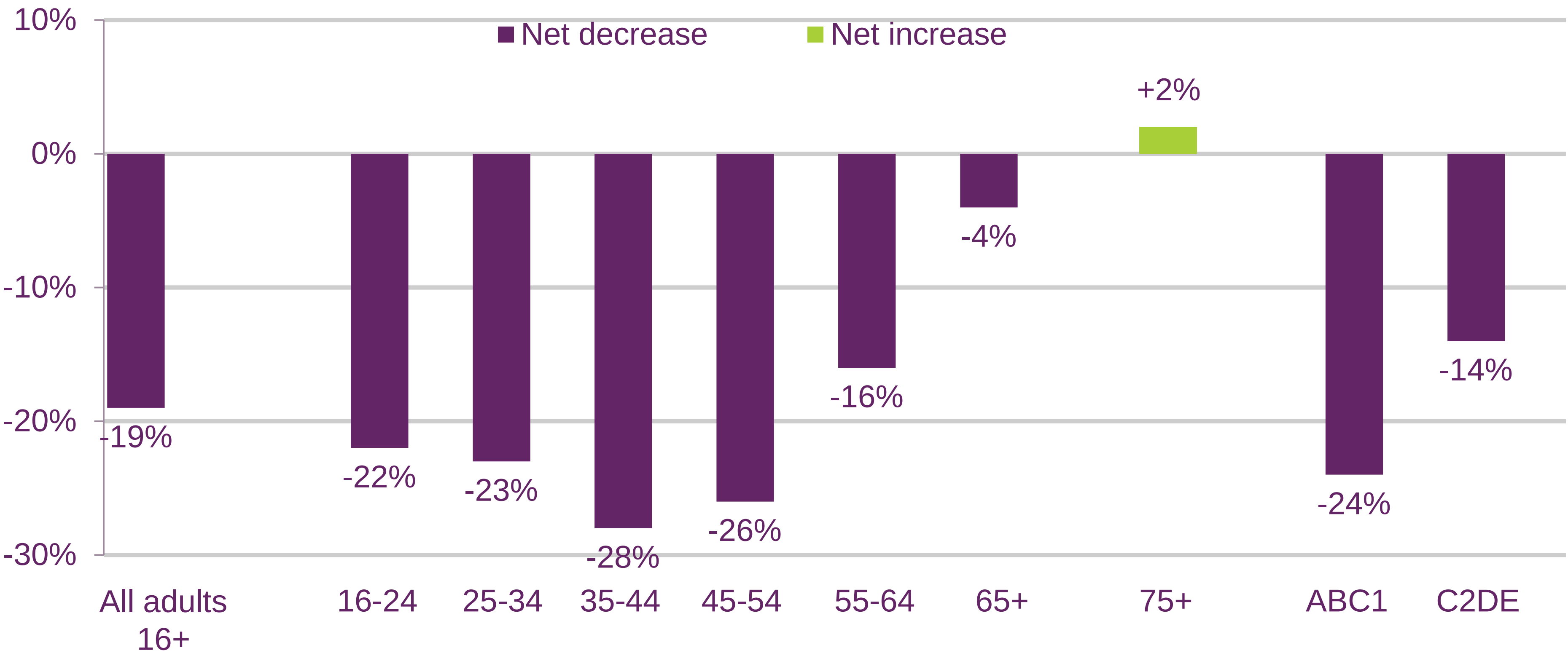


Source: GfK NOP omnibus, April 2015. Base: All adults (1878)

Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year go?

Figure 1.40

Changes in viewing ‘at time of broadcast’

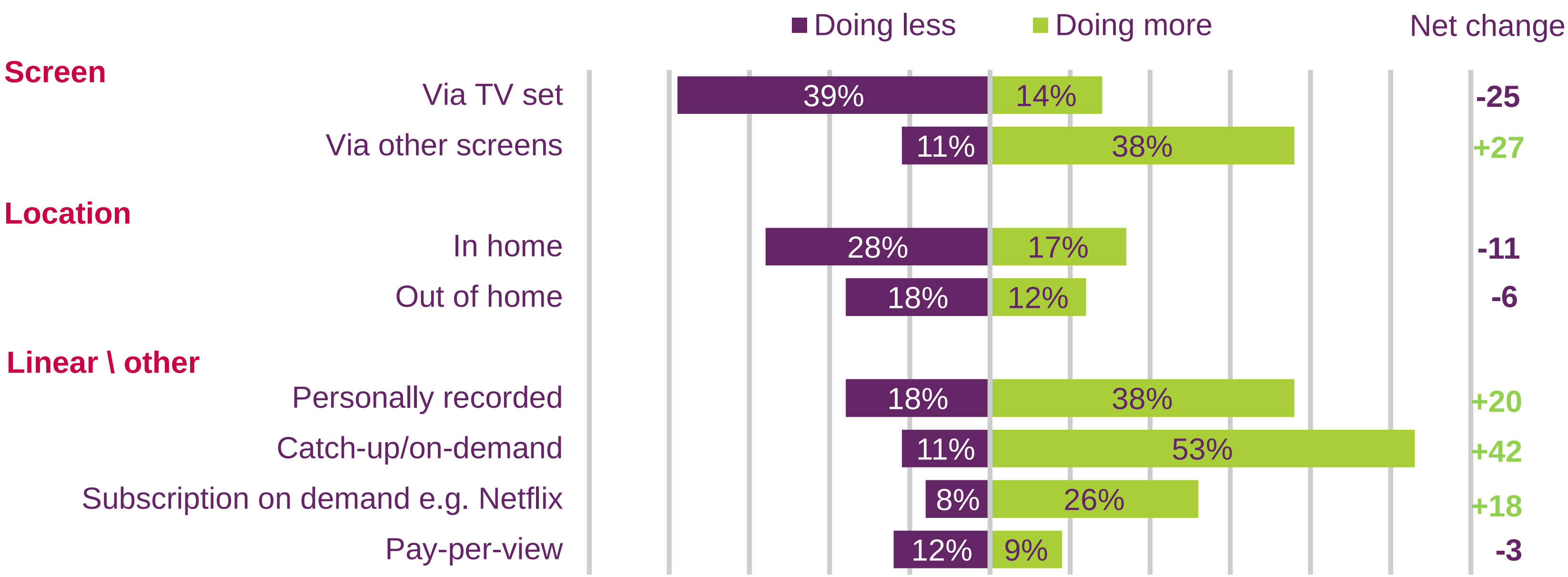


Source: GfK NOP omnibus, April 2015
Base: All adults (n=1878), 16-24 (n=236), 25-34 (n=318), 35-44 (n=293), 45-54 (n=282), 55-64 (n=244), 65+ (n=505), 75+ (n=226), ABC1 (n=739), C2DE (n=1,139)

Figure 1.41

Claimed changes in viewing devices, location and means of viewing, among those watching less TV at the time of broadcast

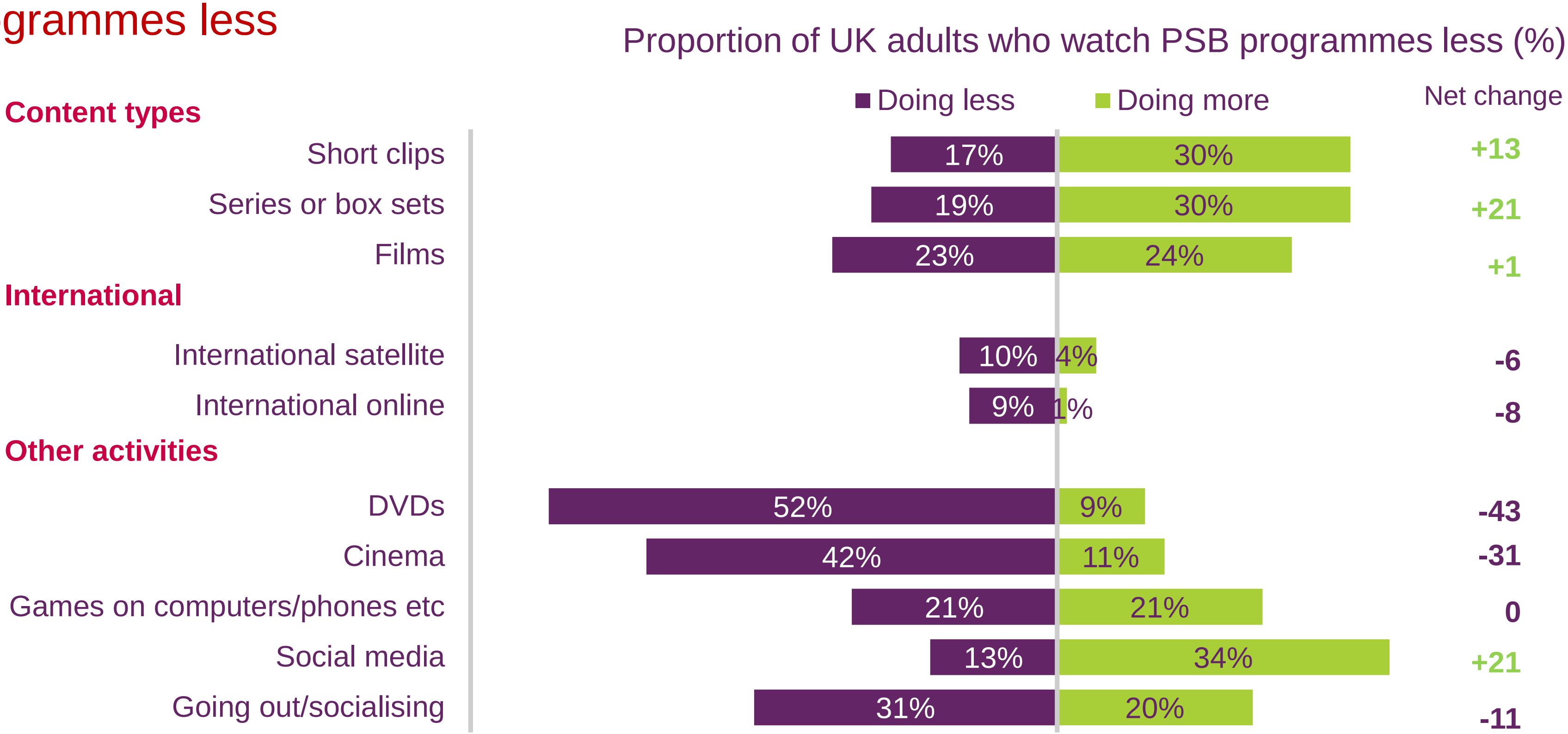
Proportion of UK adults who watch less TV at the time of broadcast (%)



Source: GfK NOP omnibus, April 2015
Base: All adults who claim to watch less TV at the time of broadcast compared to a year ago (475)

Figure 1.42

Claimed changes in viewing over the past year, among those watching PSB programmes less



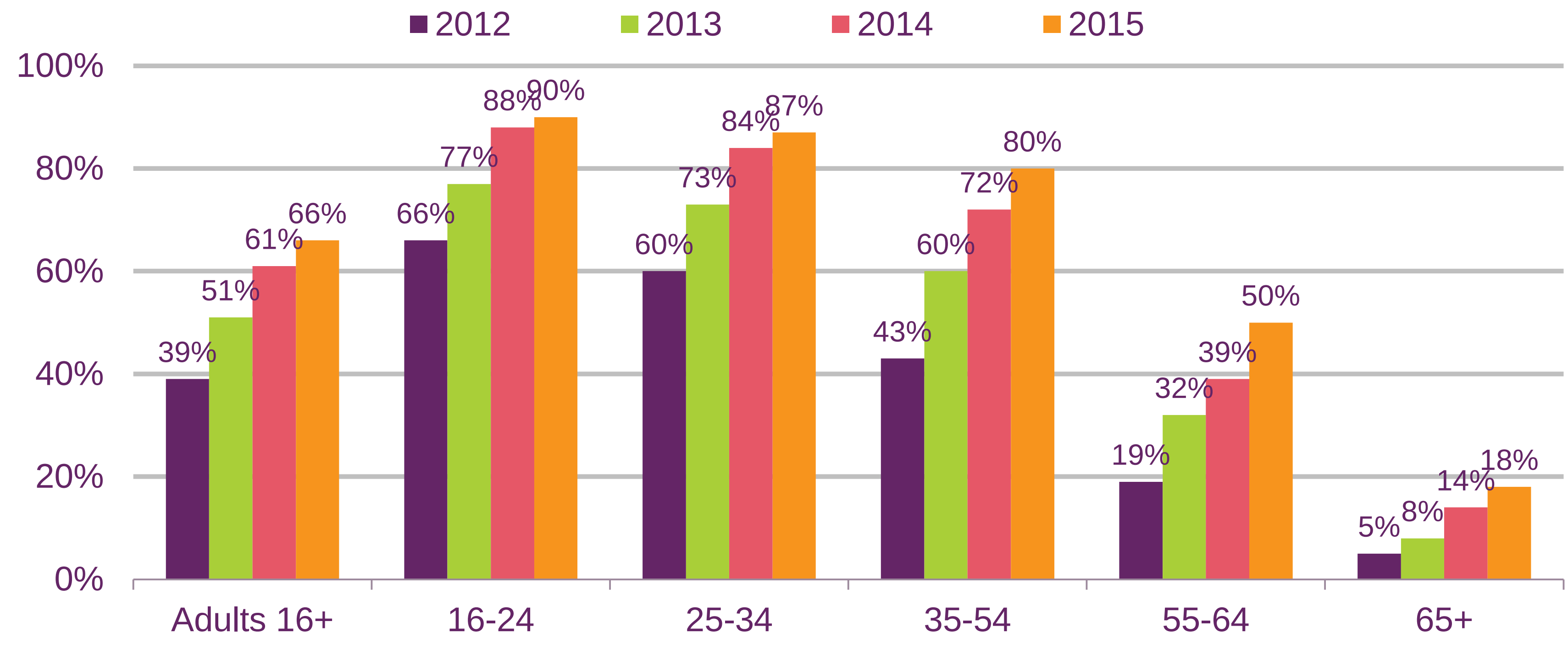
Source: GfK NOP omnibus, April 2015
Base: All adults who say they are watching less BBC, ITV/UTV/STV, C4, Five programmes (334)

A smartphone society

Figure 1.43

Smartphone ownership, by age: 2012-2015

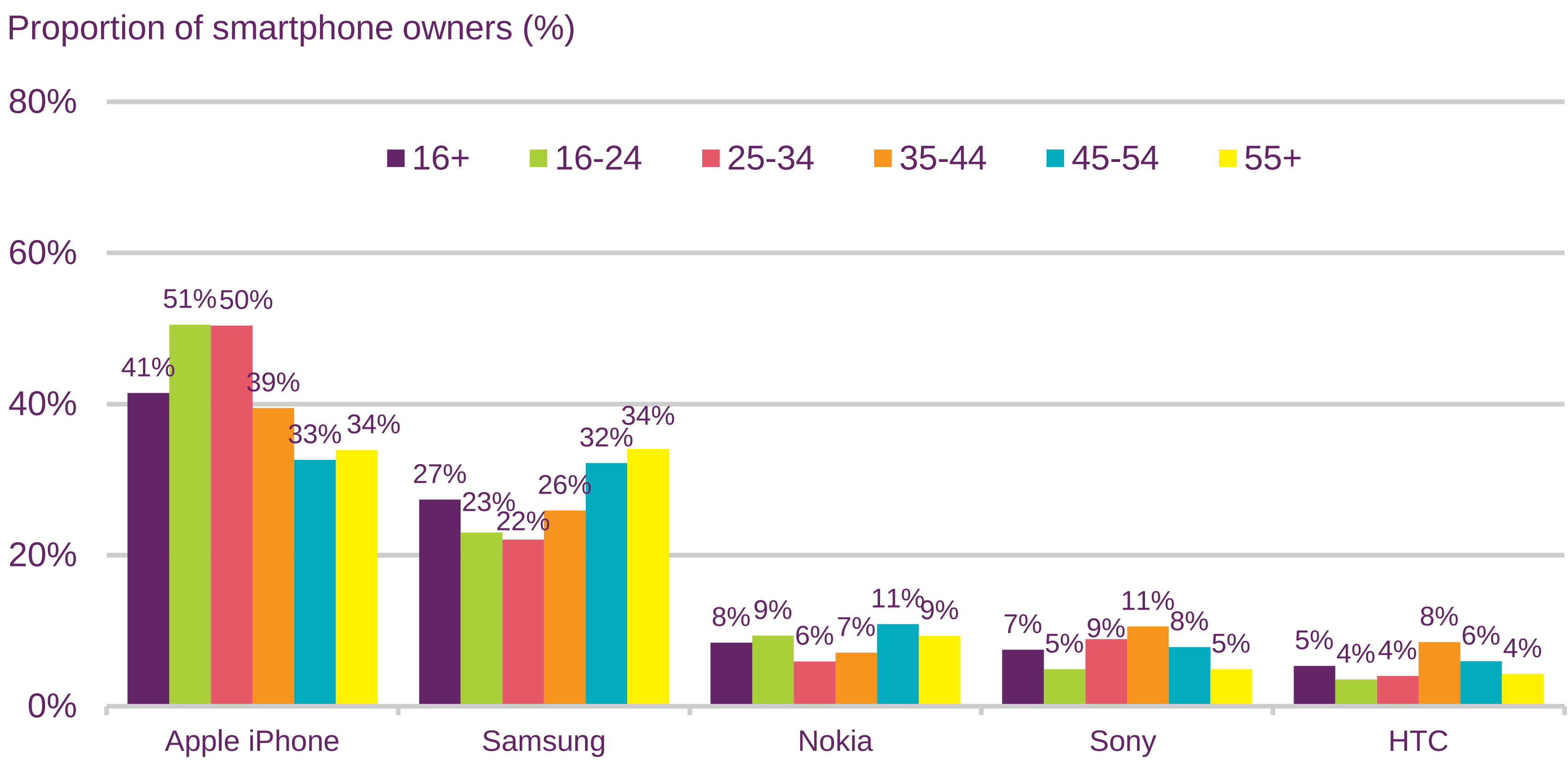
Proportion of adults(%)



Source: Ofcom Technology Tracker. Data from Quarter 1 2012-2013, then Wave 1 2014-2015
Base: All adults aged 16+ (2015 n=3756)
QD4(QD24B): Do you personally use a smartphone?

Figure 1.44

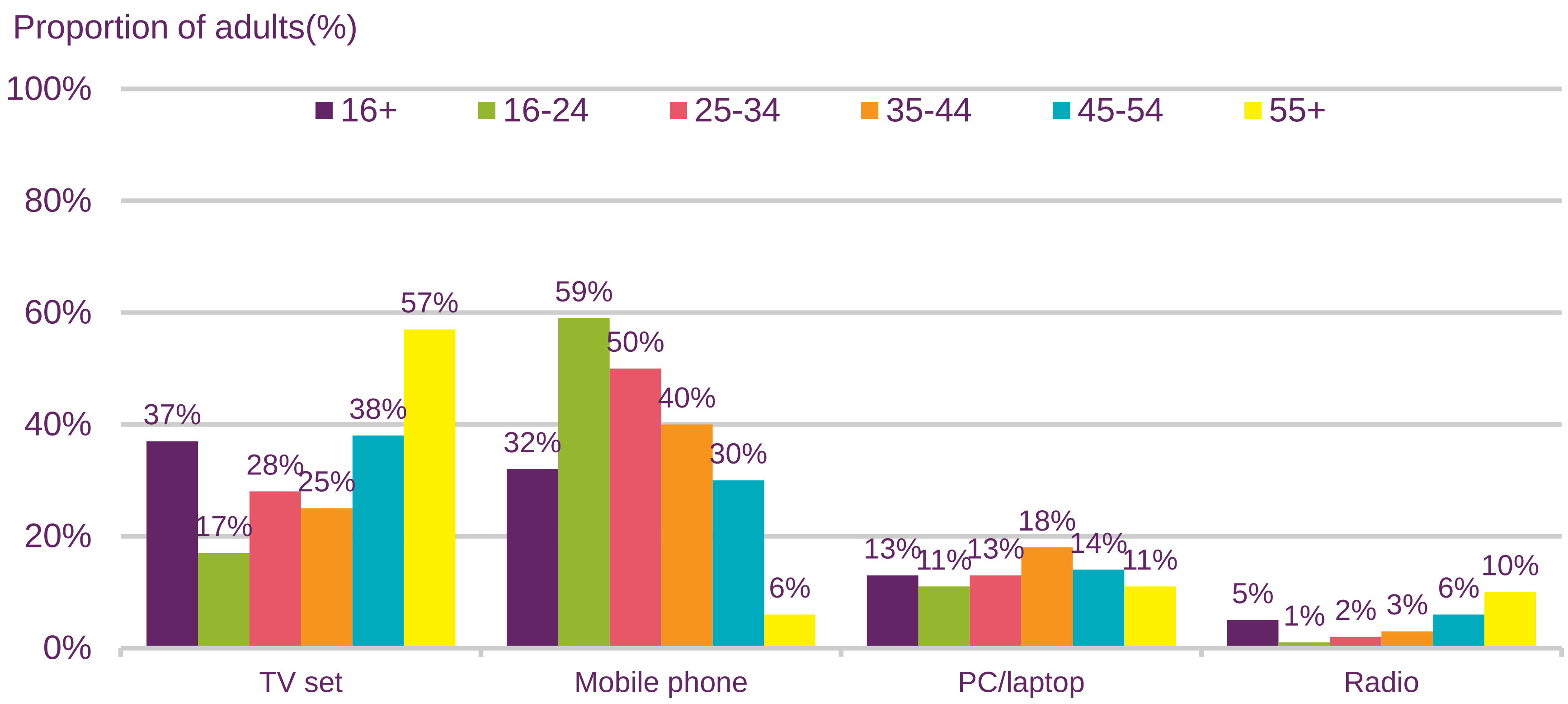
Brand of smartphone owned



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All smartphone users aged 16+ (n=1401)
Q7. You said you have a smartphone that you connect to the internet. Which of the following brand of phone do you use? If you use more than one please tell us the one you use most often.

Figure 1.45

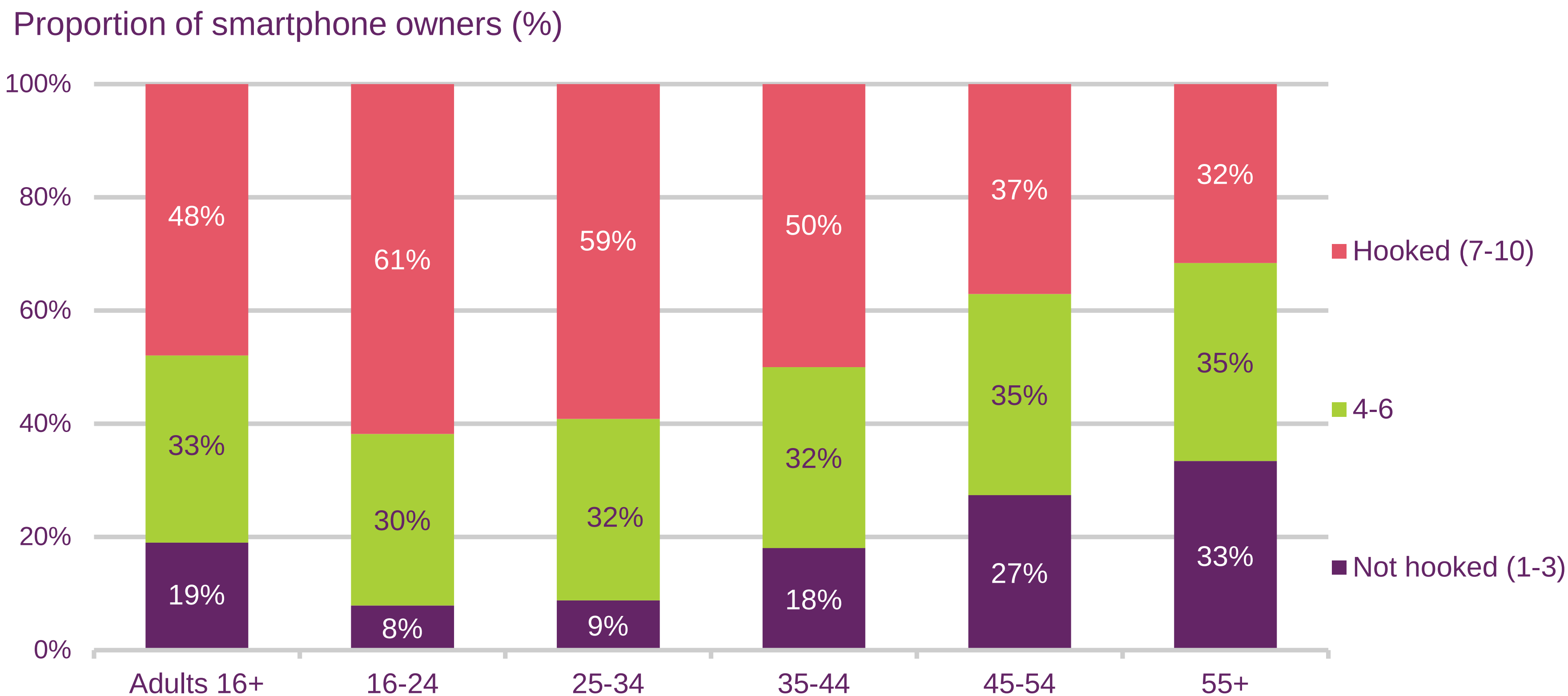
Most missed device, by age



Source: Ofcom Media Literacy Tracker– adults
Base: All adults 16+
A2. (SHOWCARD) Which one of the things you use almost every day would you miss the most if it got taken away? (SINGLE CODE)
All with 5% or more of adults responding shown

Figure 1.46

Extent to which people say they are 'hooked' on their mobile phone, by age

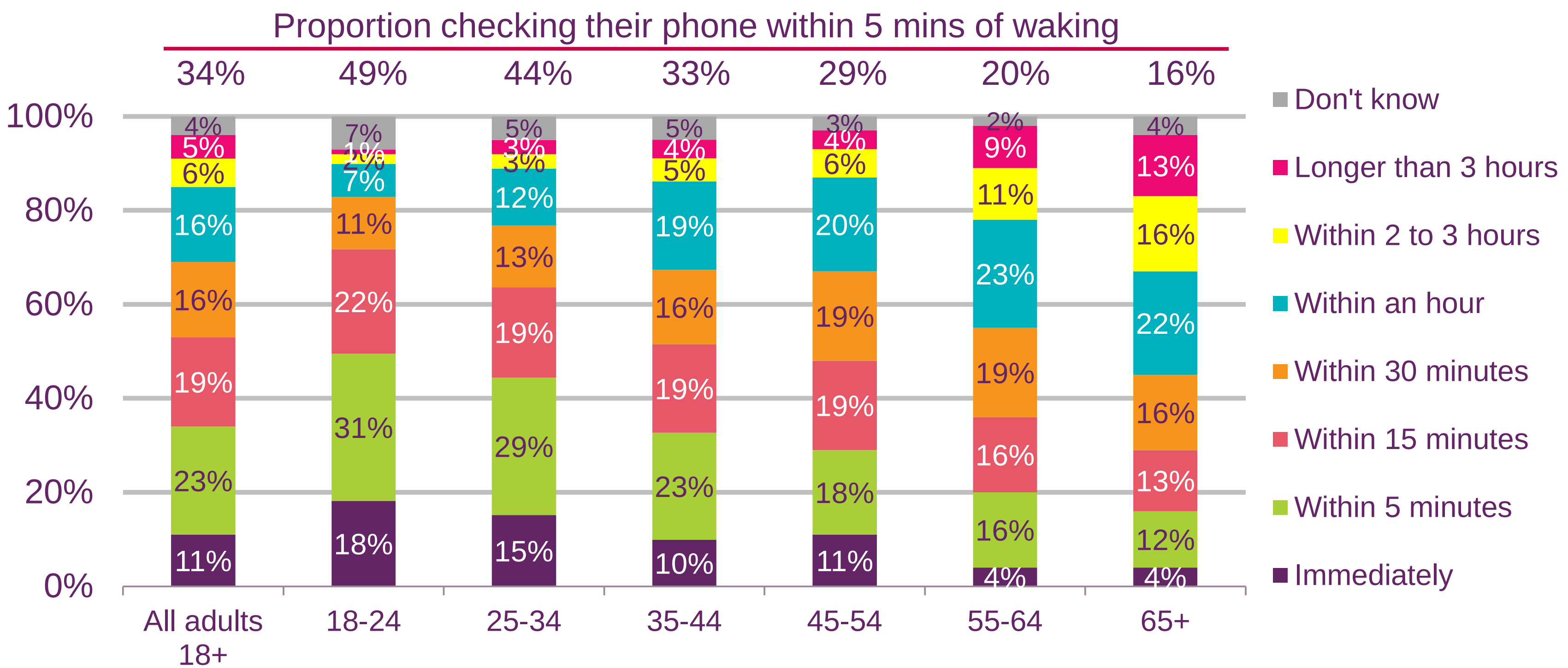


Source: Ofcom Research, 'Connected Devices', May 2015
Base: All smartphone users aged 16+ (n=1401)
Q106. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on my mobile phone' and 10 represented 'I'm completely hooked on my mobile phone', which number would you choose for yourself?

Figure 1.47

Interval between waking up and looking at phone

Proportion of smartphone owners (%)

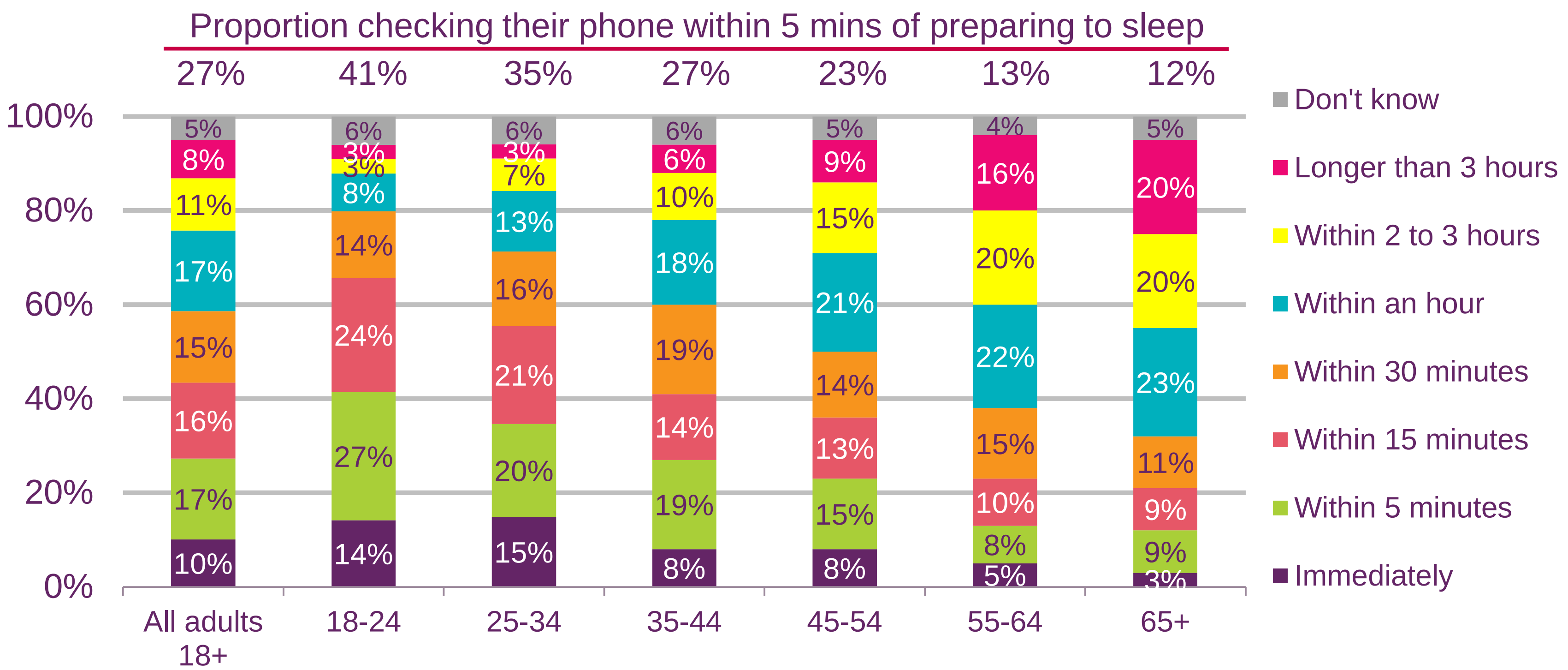


Source: Deloitte Global Mobile Consumer Survey, UK edition, May - Jun 2015
Base: Smartphone owners: 18-75 (3039), 18-24 (460), 25-34 (677), 35-44 (609), 45-54 (598), 55-64 (390), 65+ (304)
Q42 - Typically how long is the interval between you waking up and looking at your phone for the first time (not including turning off your phone's alarm clock)?

Figure 1.48

Interval between looking at phone and preparing to sleep

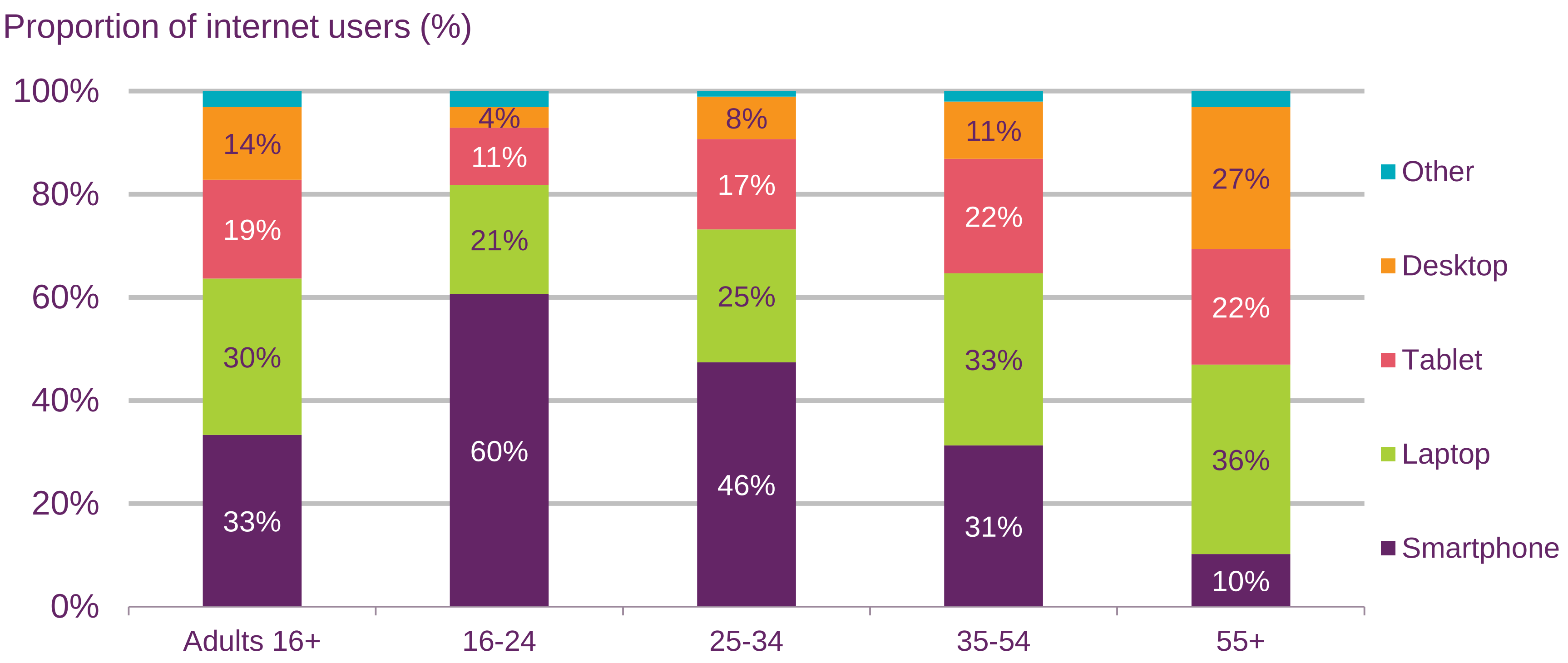
Proportion of smartphone owners (%)



Source: Deloitte Global Mobile Consumer Survey, UK edition, May - Jun 2015
Base: Smartphone owners: 18-75 (3039), 18-24 (460), 25-34 (677), 35-44 (609), 45-54 (598), 55-64 (390), 65+ (304)
Q44 - At the end of the day, typically how long is the interval between you looking at your phone for the last time and preparing to sleep (not including setting the phone's alarm clock)?

Figure 1.49

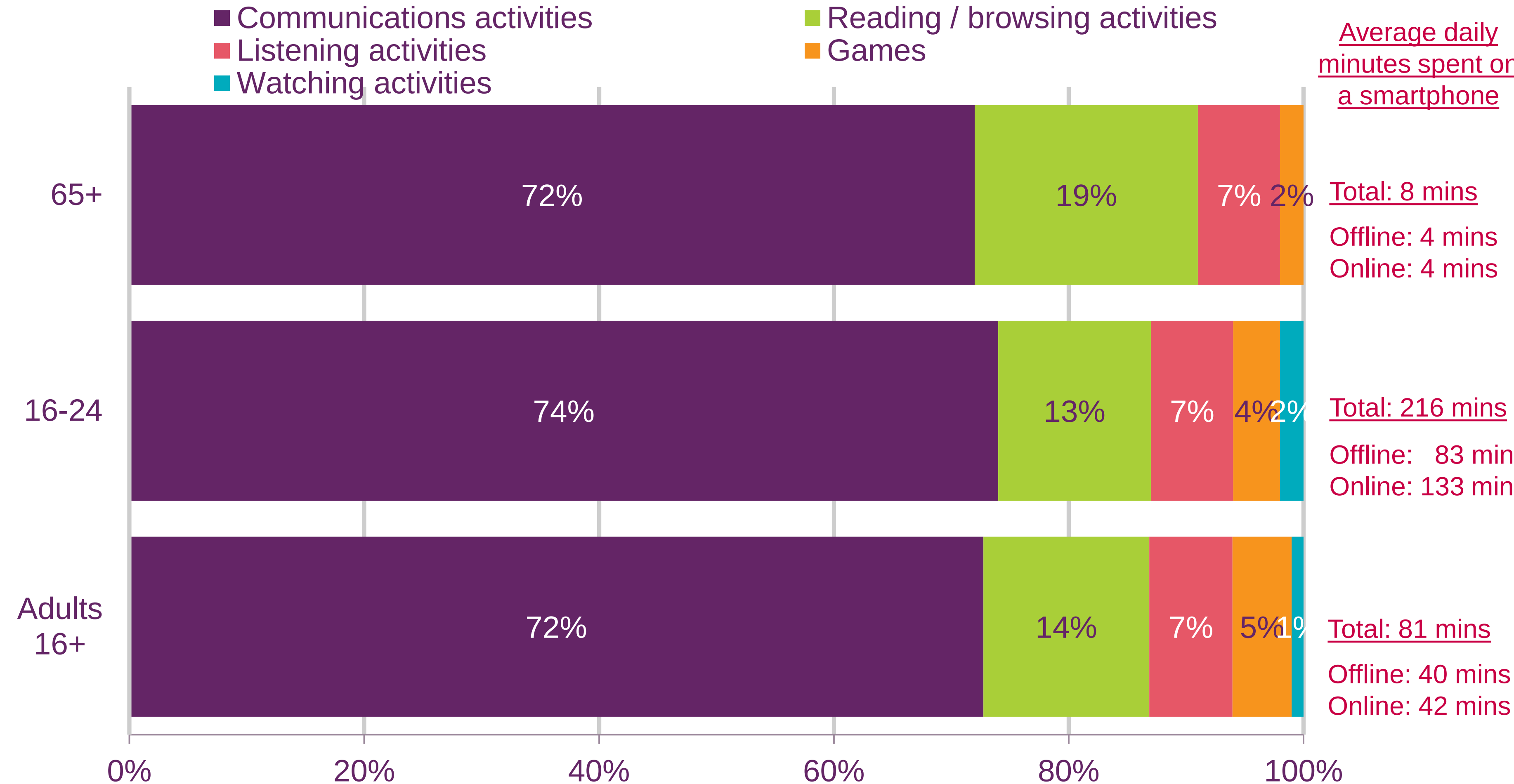
Most important device for connecting to the internet, by age



Source: Ofcom Technology Tracker, W1 2015
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK).
QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “Netbook”, “Games console”, “Other device”, “None” and “don’t know”.

Figure 1.50

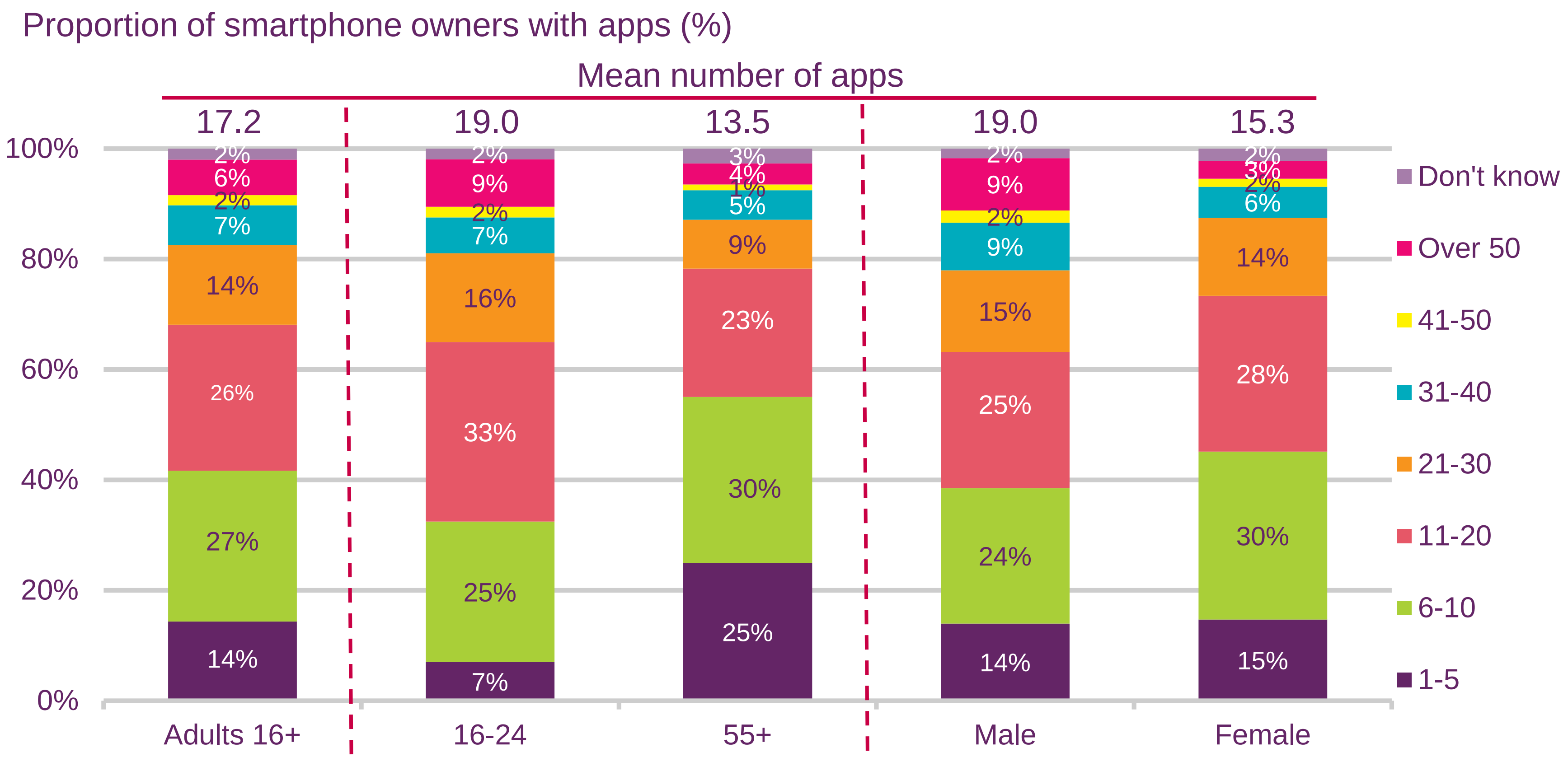
Proportion of time spent on activities on a smartphone in an average day, by age



Source: Digital Day 7 day diary
Base: All smartphone users

Figure 1.51

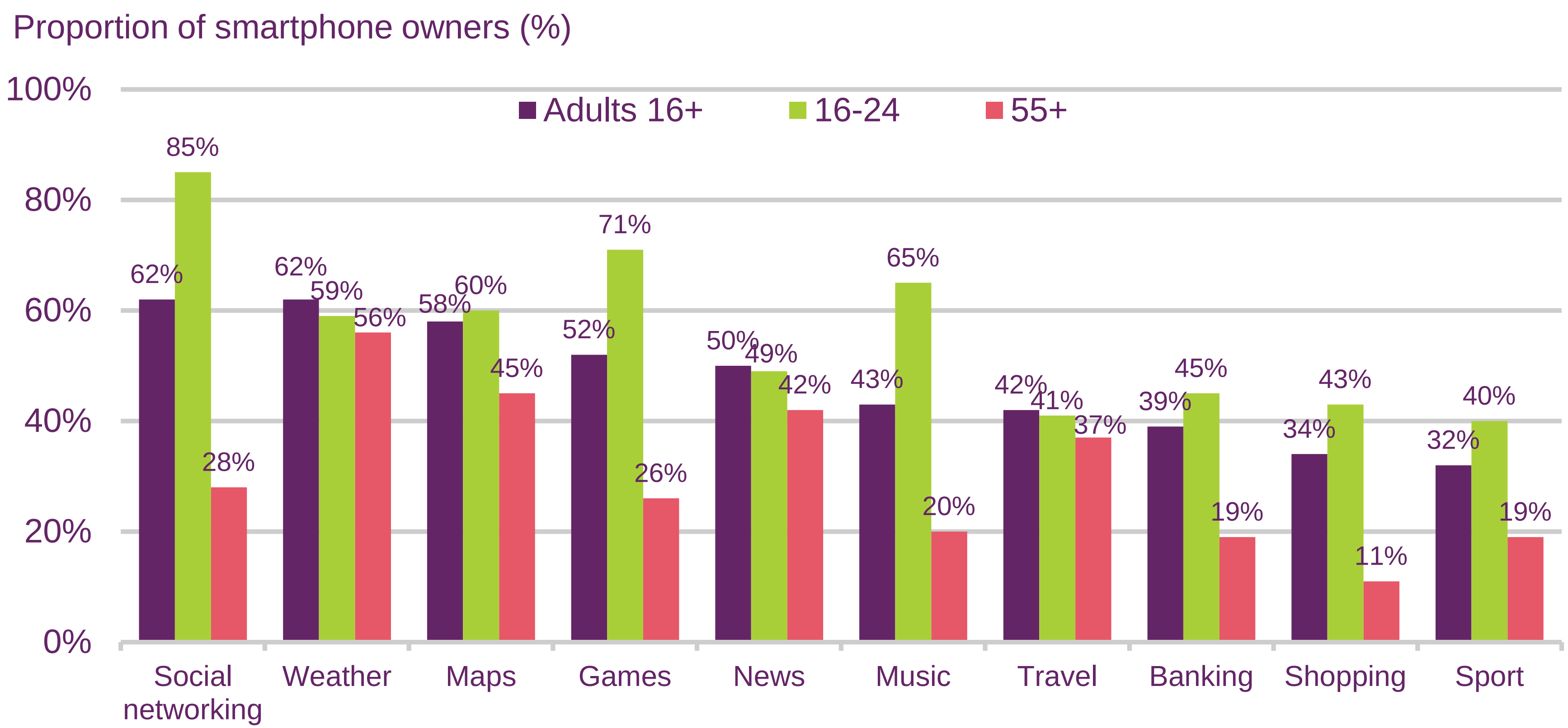
Number of smartphone apps downloaded



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All with apps on their smartphone (n=1378)
Q105a. How many apps have you downloaded on your current phone? An estimate is fine.

Figure 1.52

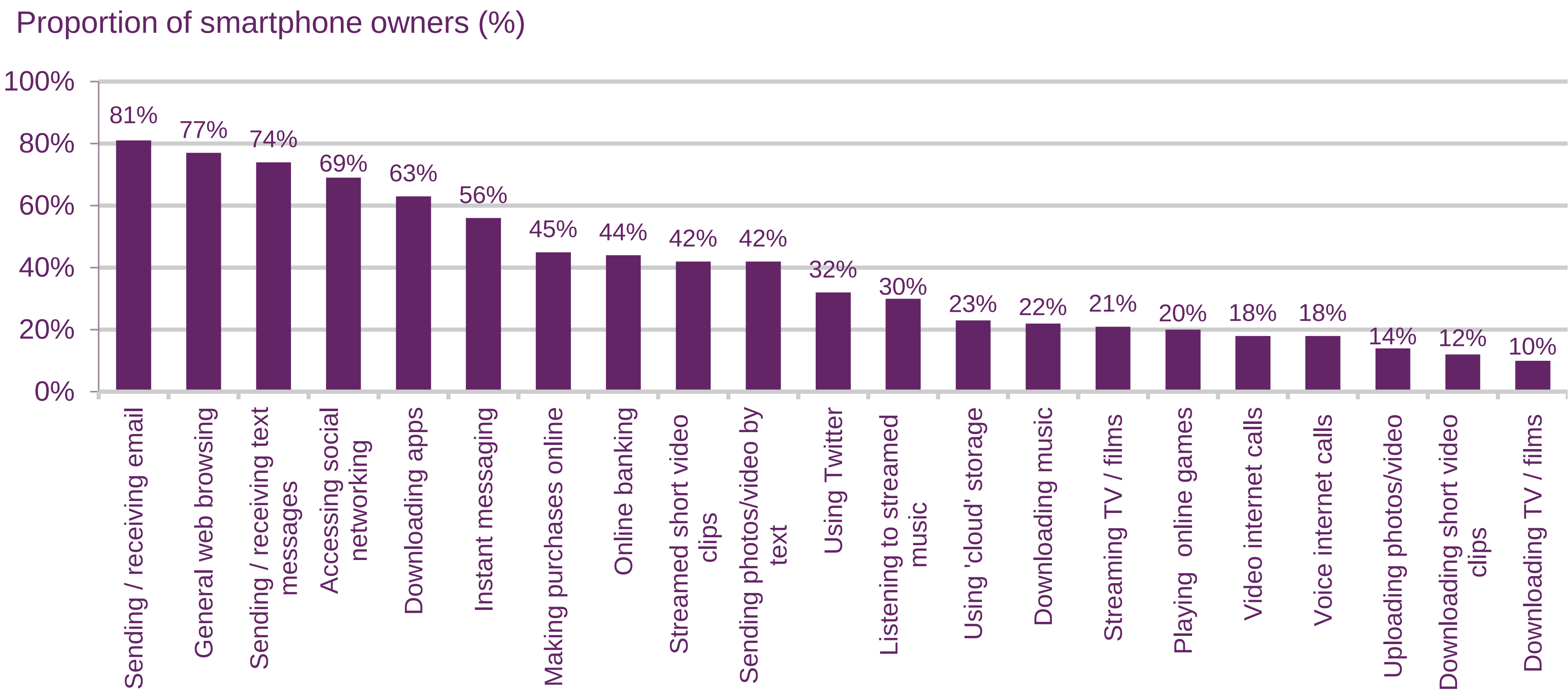
Top ten types of apps downloaded, by age



Source: Ofcom Technology Tracker Q1 2015.
Base: All with a smartphone (n=1766)
QD17 (QD28G). SHOWCARD Do you use any of the following types of apps or applications on your smartphone? (MULTI CODE)

Figure 1.53

Claimed use of activities on a smartphone

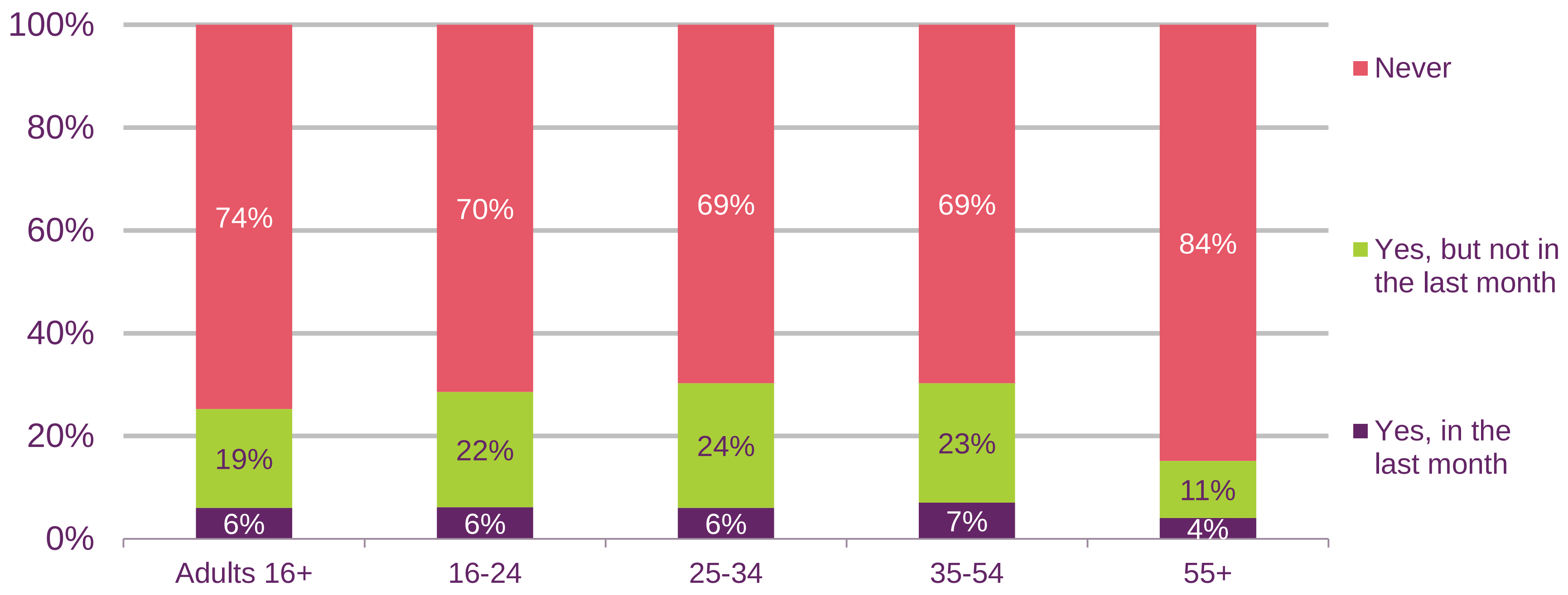


Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone users (n=1401)
Q36B. And which of the following, if any, do you do on the below device(s)? Smartphone

Figure 1.54

Making charitable donations by text message, by age

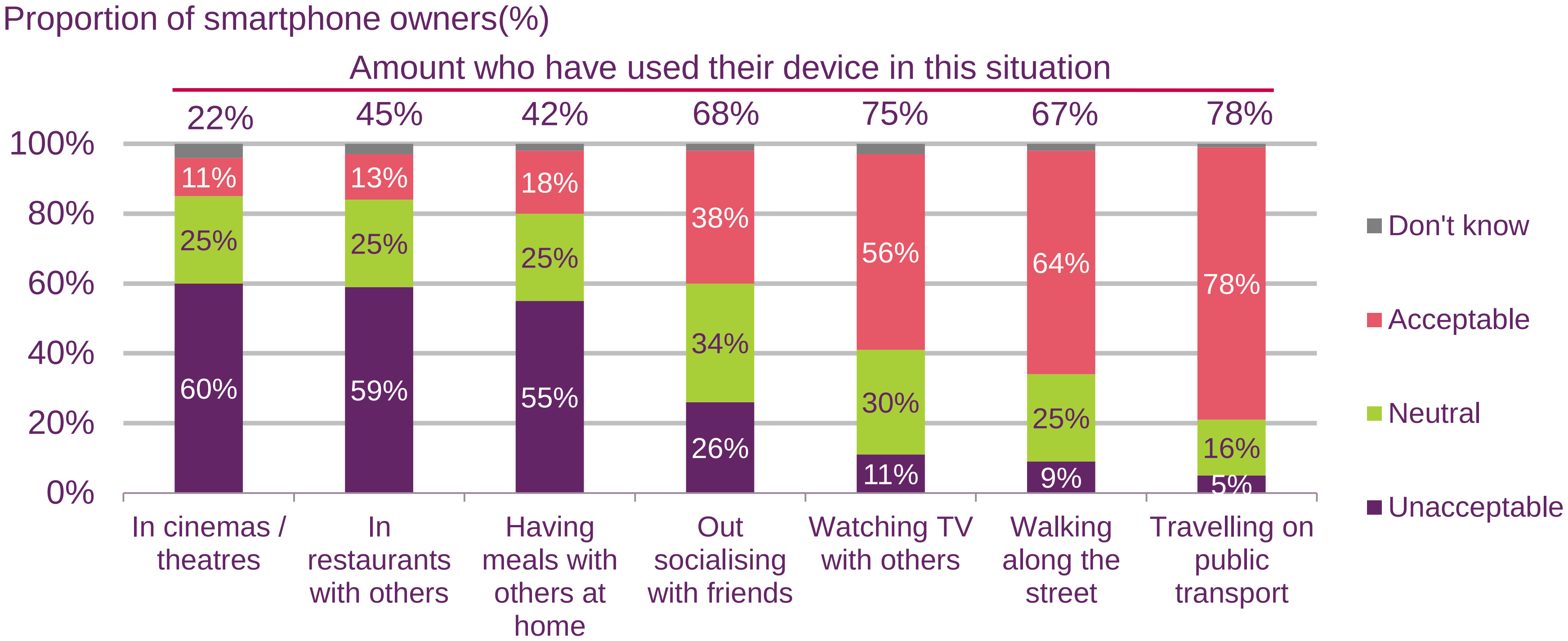
Proportion of mobile phone owners (%)



Source: Ofcom Technology Tracker, Quarter 1 2015
Base: All mobile phone users (n = 2475).
QD11 (QD44). Have you ever sent a donation to charity via a text message from your mobile phone? IF YES - Have you sent a text donation in the last month? (SINGLE CODE)

Figure 1.55

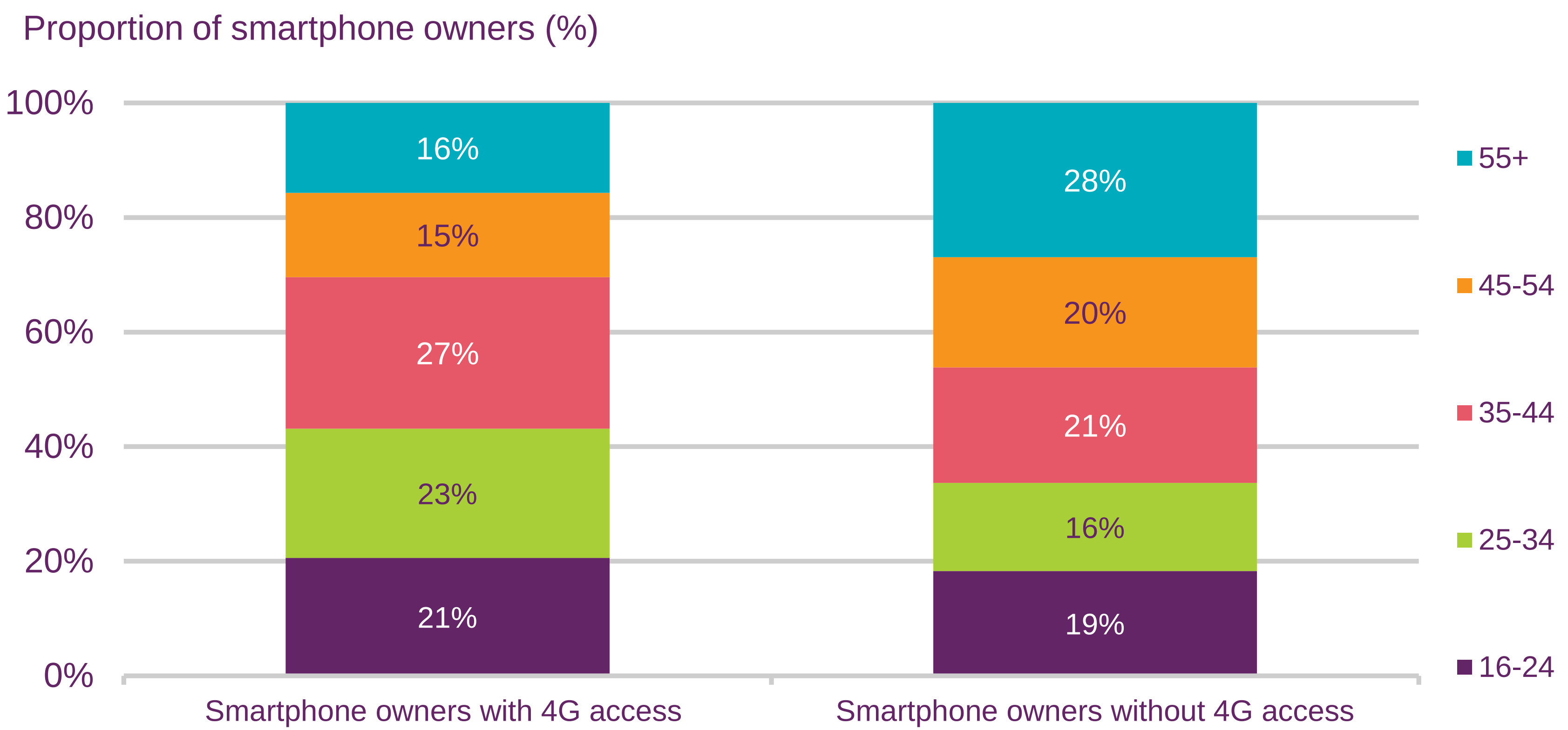
Level of acceptability of mobile phone use in social situations



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All smartphone users = 1401
Q110. Thinking about the use of mobile connected devices in general, such as smartphones or tablet computers. For each of the following occasions, please indicate if you have personally used a mobile connected device at this time and/or have been with others when they have used a device on this occasion
Q111. And for each occasion, could you indicate the extent to which you think using a mobile device at this time is acceptable?

Figure 1.56

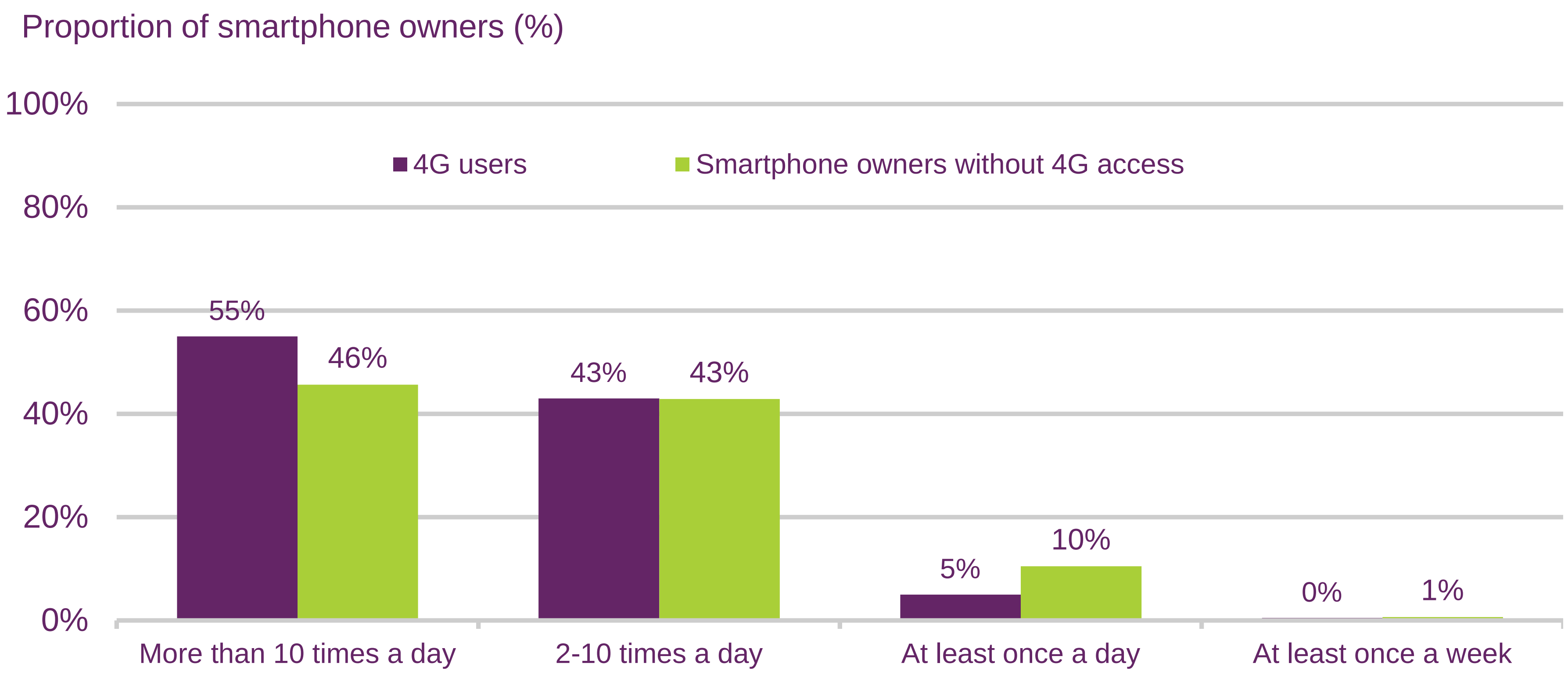
Age profiles of smartphone users with and without 4G access



Source: Ofcom Research, ‘Connected Devices’, May 2015
Base: All smartphone owners aged 16+ (n=1401)
Q101. 4G is the fourth generation of mobile phone technology and follows on from 2G and 3G. It should make it much quicker to access the internet on mobile devices. Can you access the 4G network service on any of your devices?

Figure 1.57

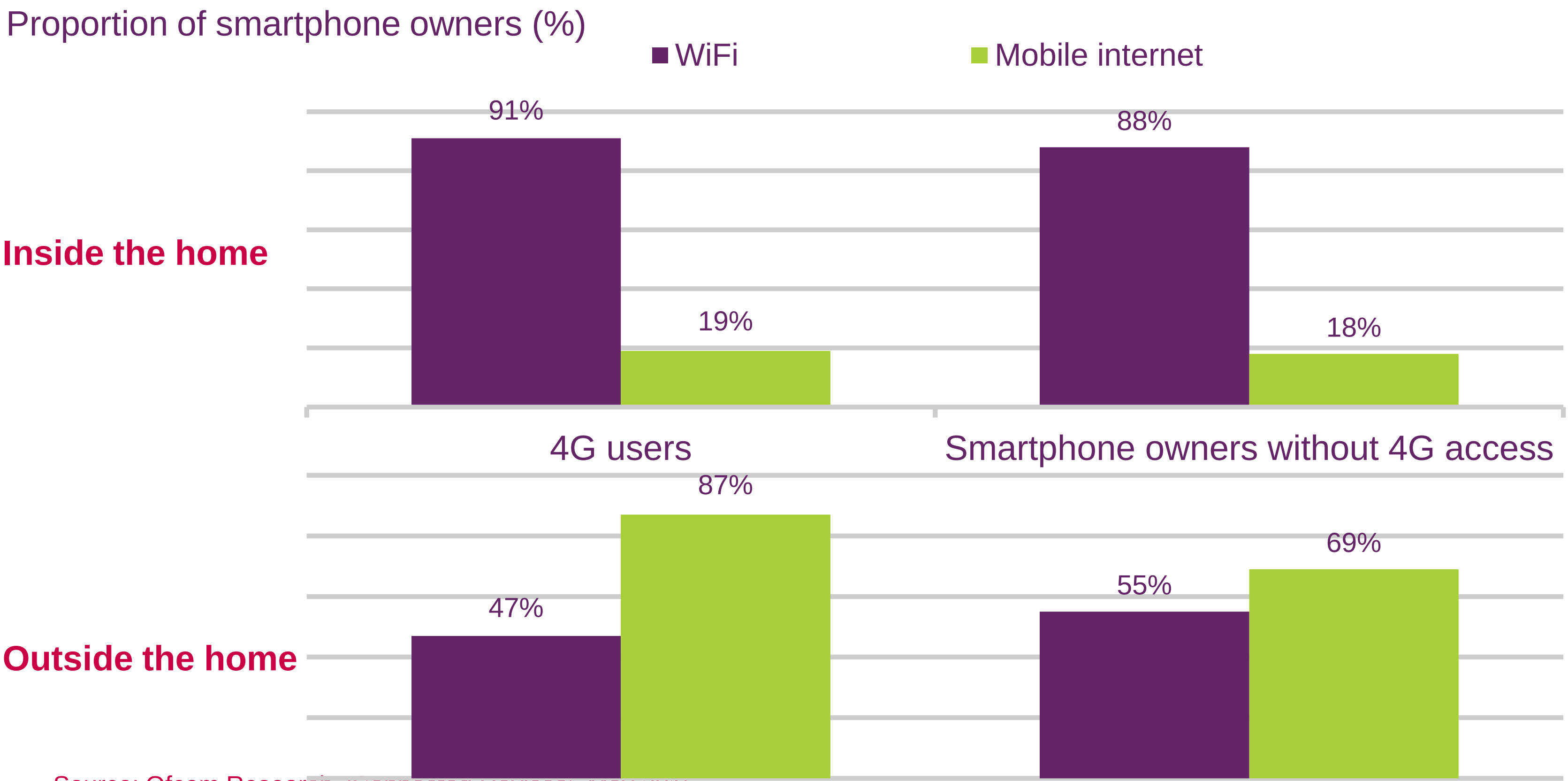
Frequency of online use



Source: Ofcom Research, 'Connected Devices', May 2015
Base: Smartphone users who use 4G (n=641); smartphone users without 4G access (n=641)
Q10. How often do you personally go online nowadays either at home or elsewhere? By this we mean the amount of times you go online to browse the internet or use online apps.

Figure 1.58

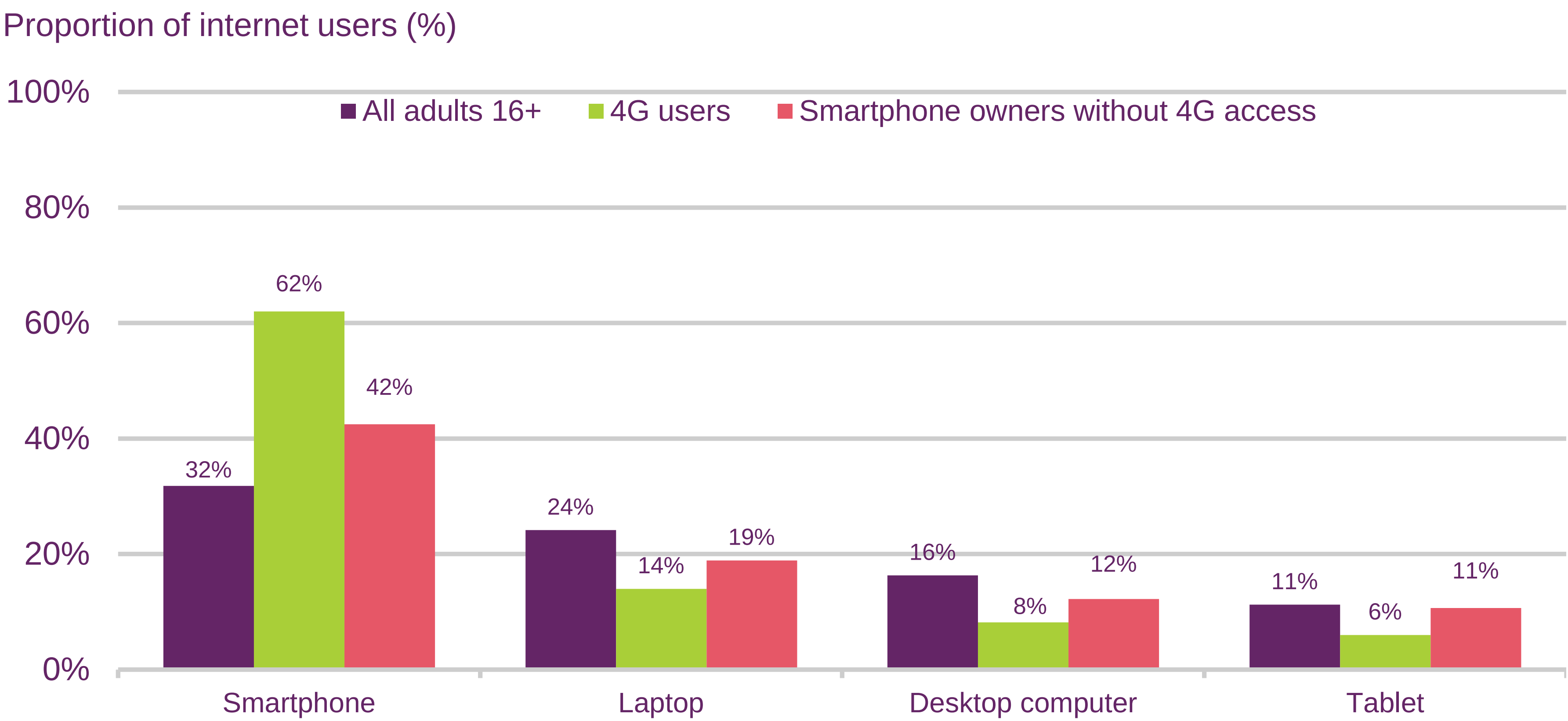
Type of internet access on a smartphone, by type of mobile network



Source: Ofcom Research, 'Connected Devices', May 2015
Base: Smartphone users who use 4G (n=641); smartphone users without 4G access (n=641)
*Q11TT. And thinking specifically about when you use your **smartphone** to access the internet at home, which of these methods do you use? Please select all that apply.*
Q12_rc_6. And, which of these methods do you use to connect your portable devices to the internet when outside of the home/when you are out and about? - Smartphone

Figure 1.59

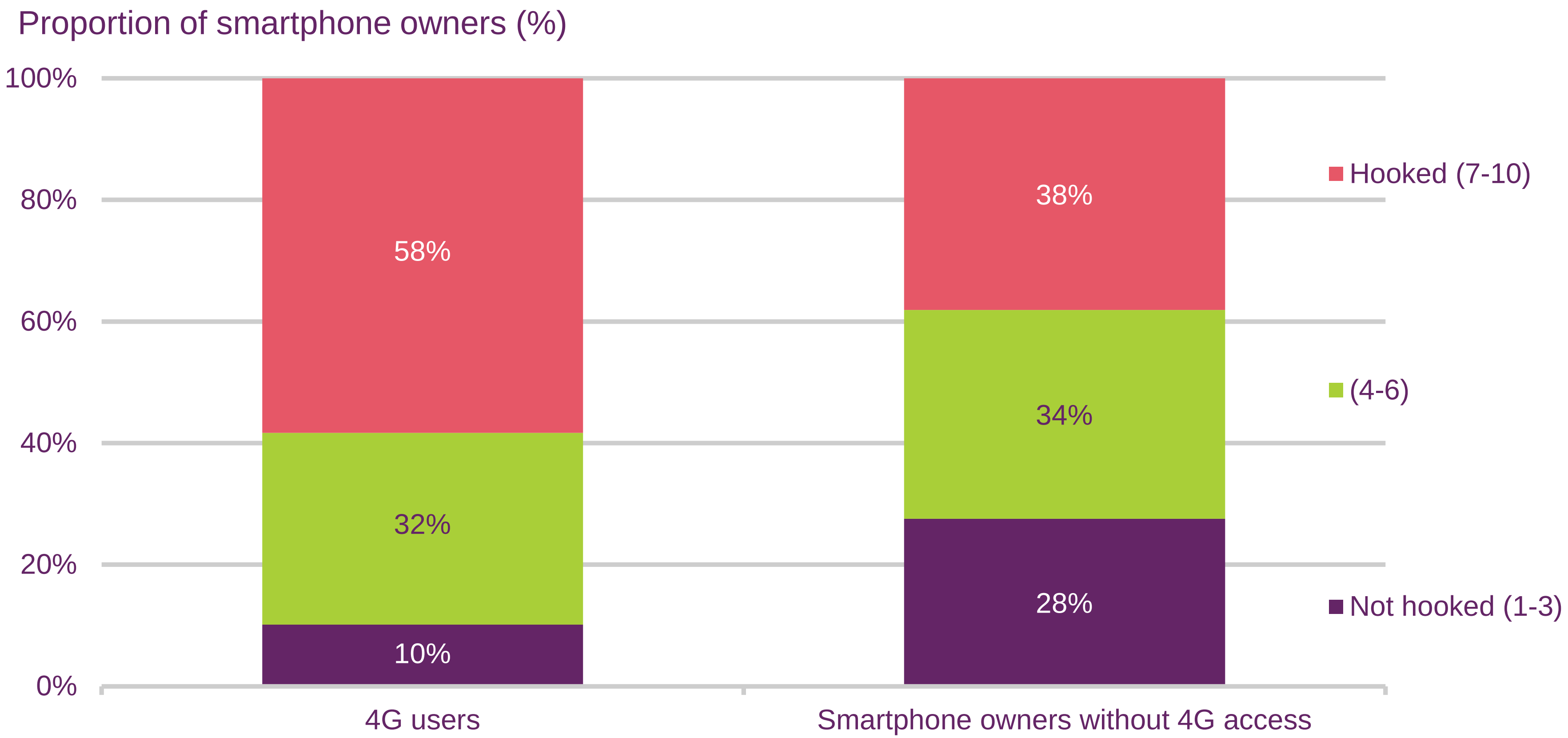
Connected device couldn't live without



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All online adults with (n=2290); smartphone users who use 4G (n=641); smartphone users without 4G access (n=641)
Q14a. How often would you say you use 4G to access the internet or use online services on any of your mobile device(s)? ANY USE
Q5. Which is the one connected device you would say you couldn't live without?

Figure 1.60

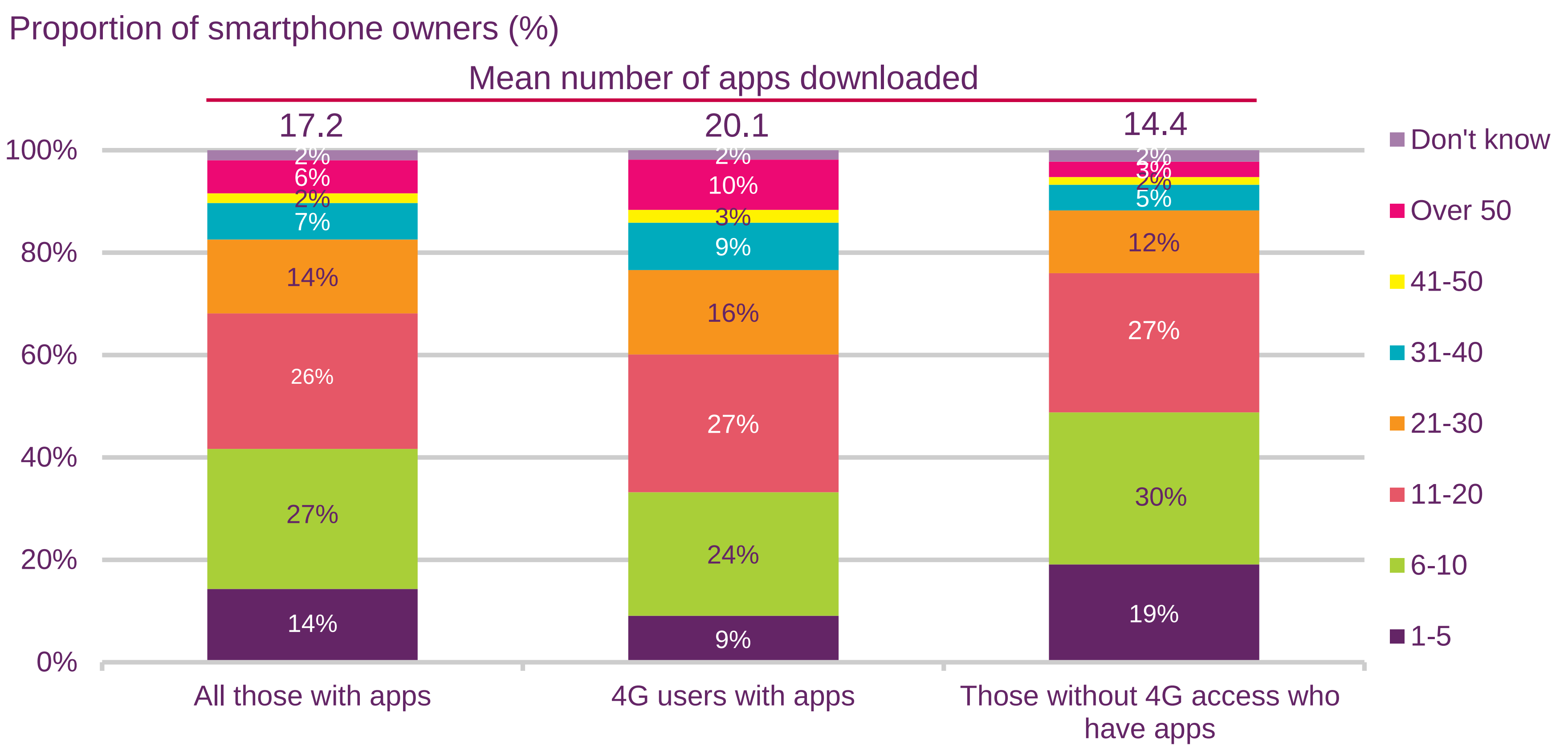
Extent to which smartphone owners say they are 'hooked' on their device, 4G users vs. those without 4G access



Source: Ofcom Research, 'Connected Devices', May 2015
Base: 4G users (n=641); smartphone owners without 4G access (n=641)
Q106. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on my mobile phone' and 10 represented 'I'm completely hooked on my mobile phone', which number would you choose for yourself?

Figure 1.61

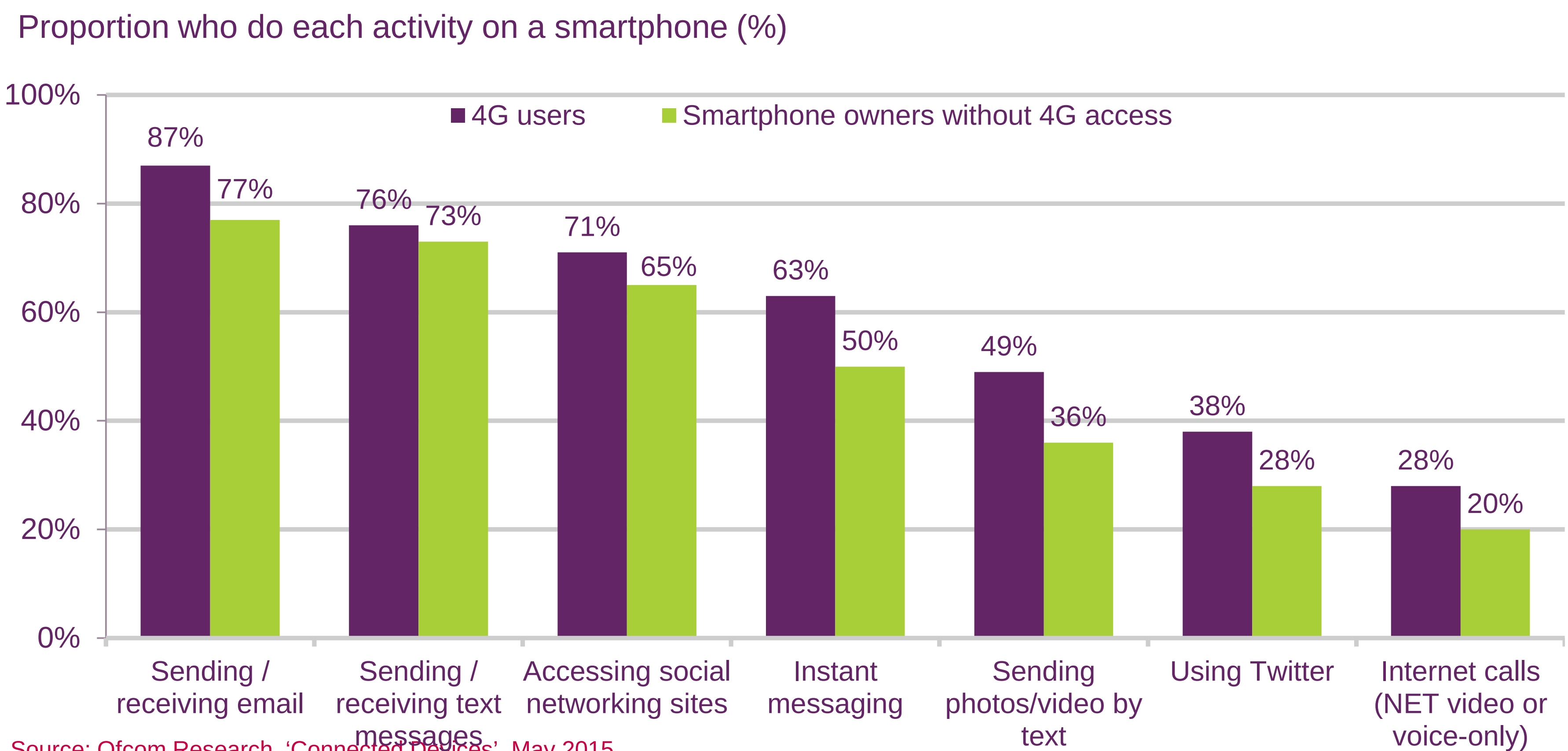
Number of smartphone apps downloaded



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All with apps on their smartphone (n=1378); 4G users with apps (n=636); smartphone users without 4G access and have apps on their phone (623)
Q105. Which of these type of app have you downloaded on your smartphone?

Figure 1.62

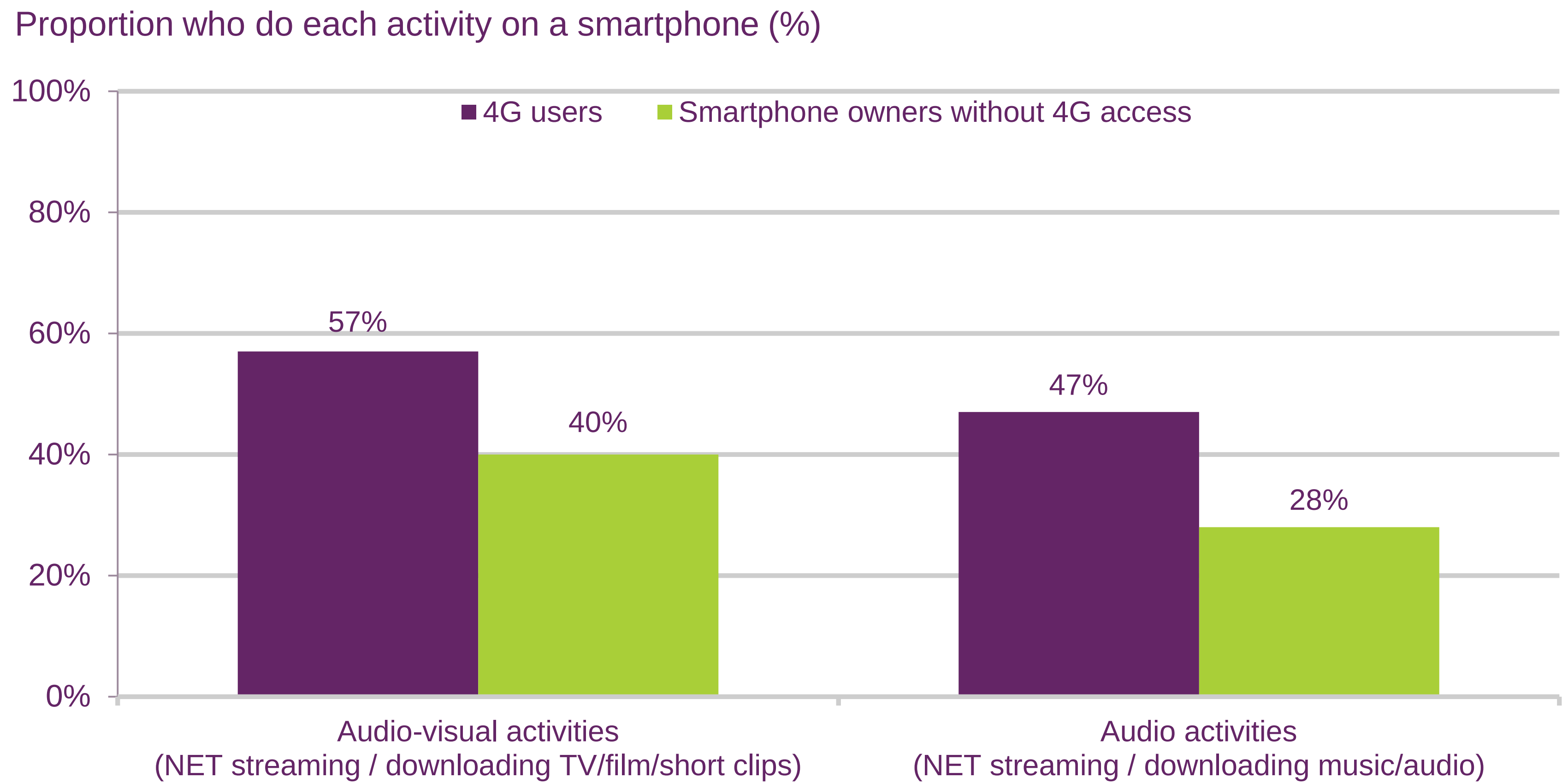
Communication activities carried out using a smartphone



Source: Ofcom Research, 'Connected Devices', May 2015
Base: Smartphone users who use 4G (n=641); smartphone users without 4G access (n=641)
Q36B. And which of the following, if any, do you do on the below device(s)? - SMARTPHONE

Figure 1.63

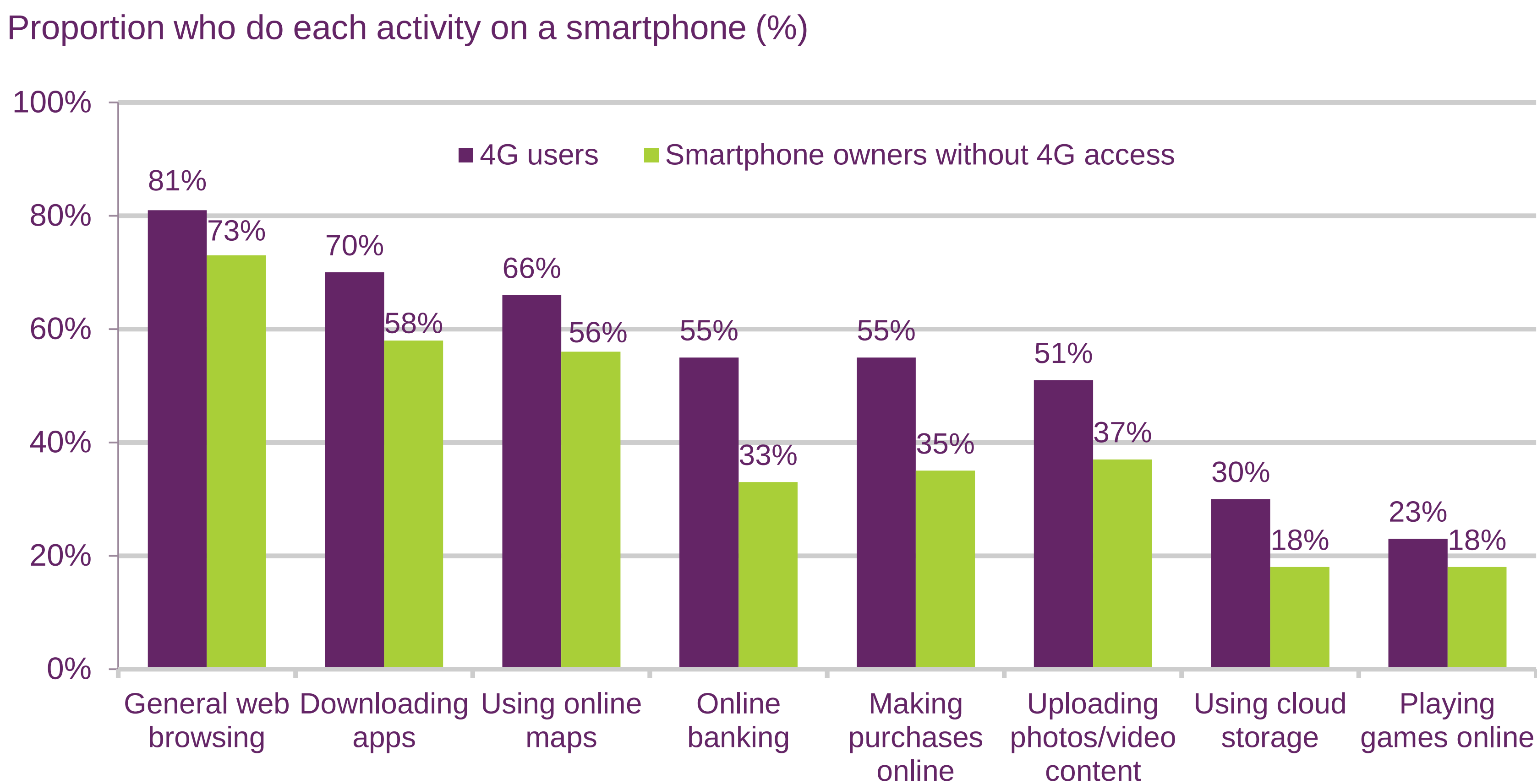
Audio / audio-visual activities carried out using a smartphone



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All smartphone owners (n=1401); smartphone owners who use 4G (n=641); smartphone users without 4G access (n=641)
Q36B. And which of the following, if any, do you do on the below device(s)? - SMARTPHONE

Figure 1.64

Other online activities carried out using a smartphone

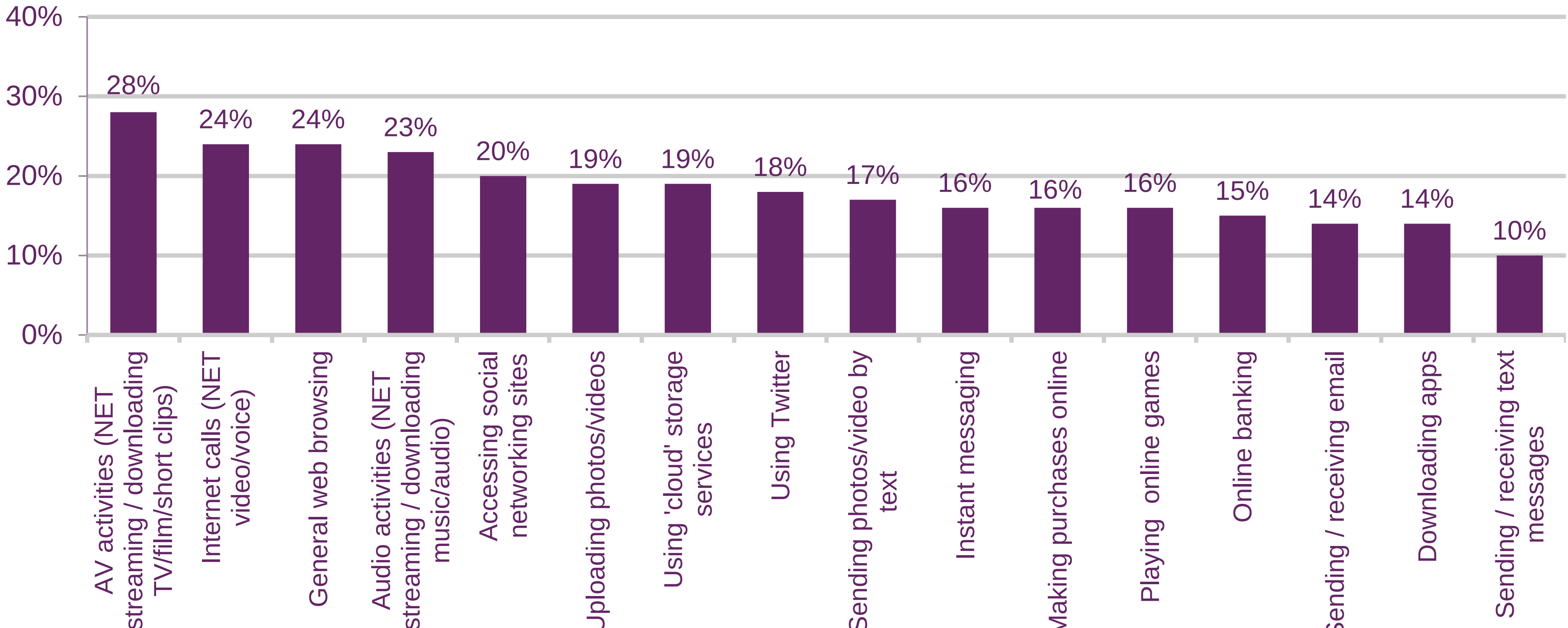


Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q36B. And which of the following, if any, do you do on the below device(s)? - smartphone

Figure 1.65

Smartphone activities: 4G use compared with previous 3G use

Extent to which smartphone owners do the activity more since having access to 4G (%)

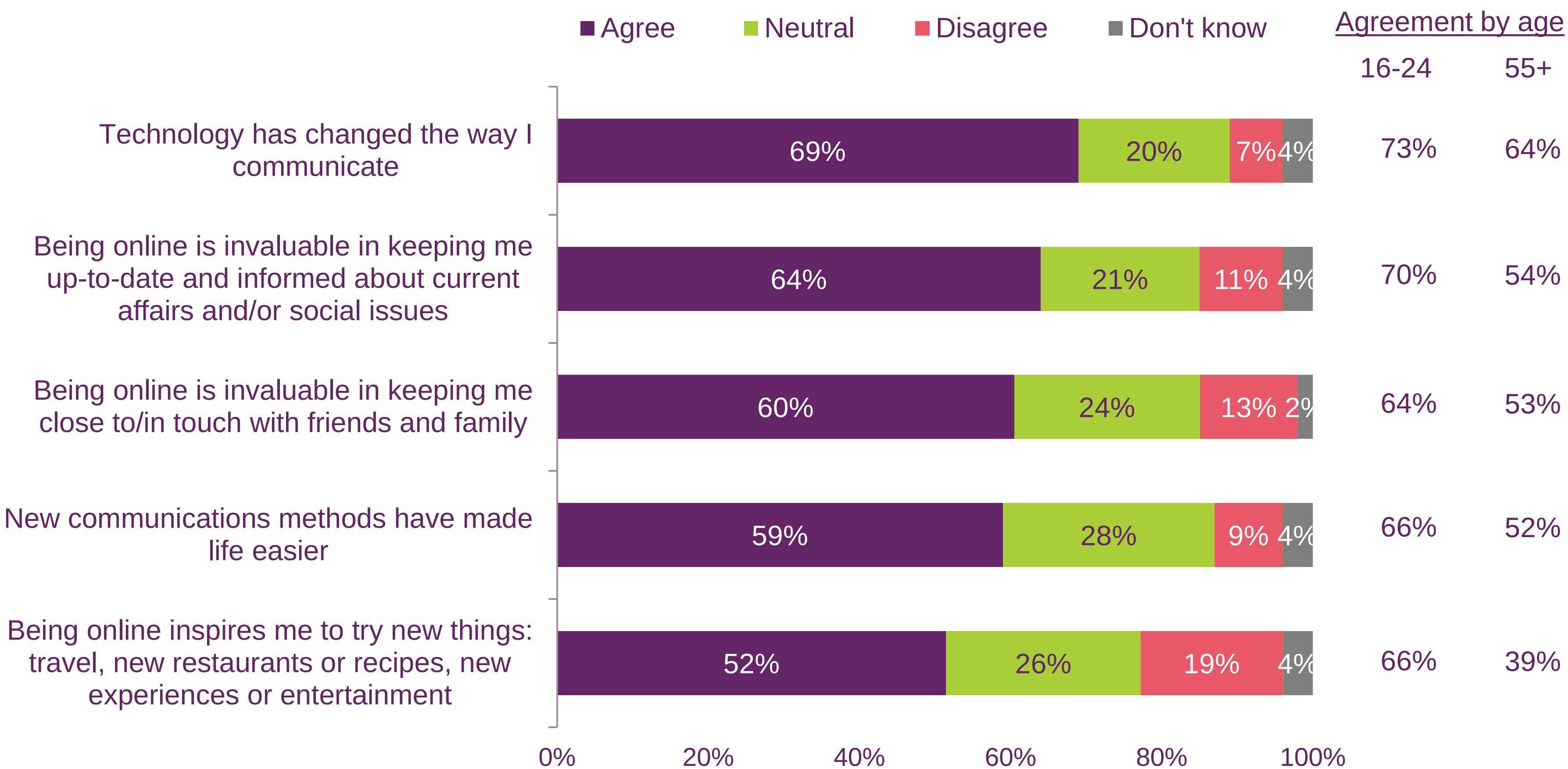


Source: Ofcom Research, 'Connected Devices', May 2015
Base: 4G users (n=641)
Q36BB. Compared to 3G, do you do more or less the following activities now that you are have access to 4G on your smartphone?

Communication with friends and family

Figure 1.66

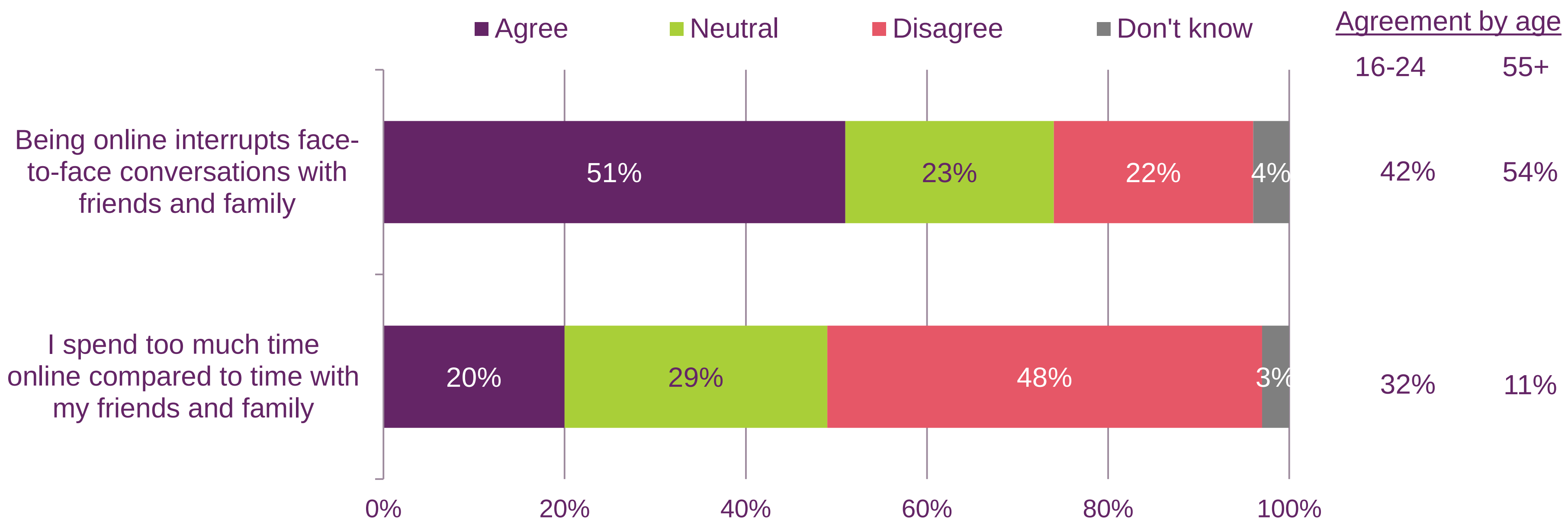
Level of agreement with positive statements about online communications



Source: Ofcom Research, 'Connected Devices', May 2015
Q115. Finally, how much do you agree or disagree with the following statements?
Base: Total= 2290

Figure 1.67

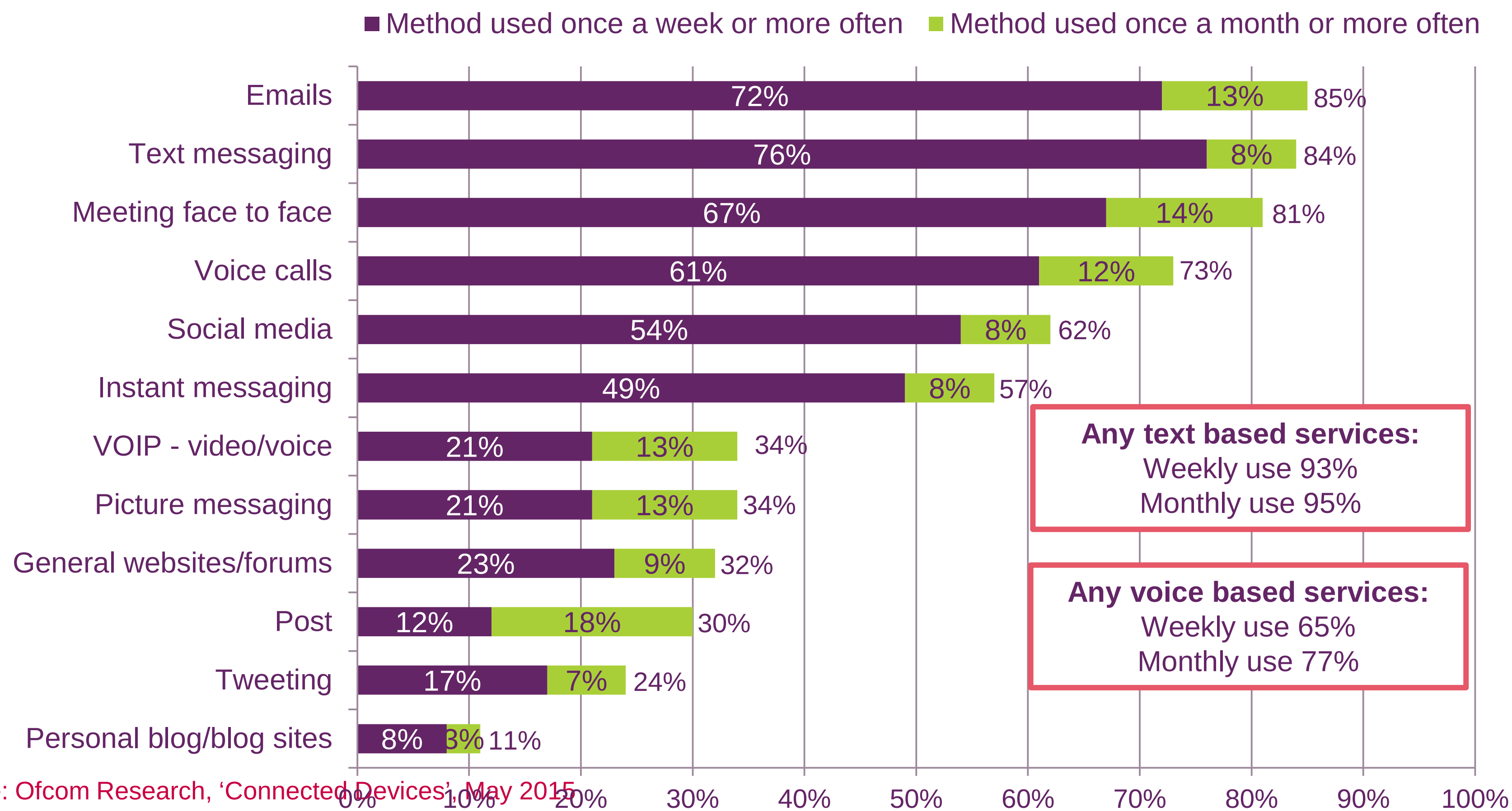
Level of agreement with negative statements about online communications



Source: Ofcom Research, 'Connected Devices', May 2015
Q115. Finally, how much do you agree or disagree with the following statements?
Base: Total= 2290

Figure 1.68

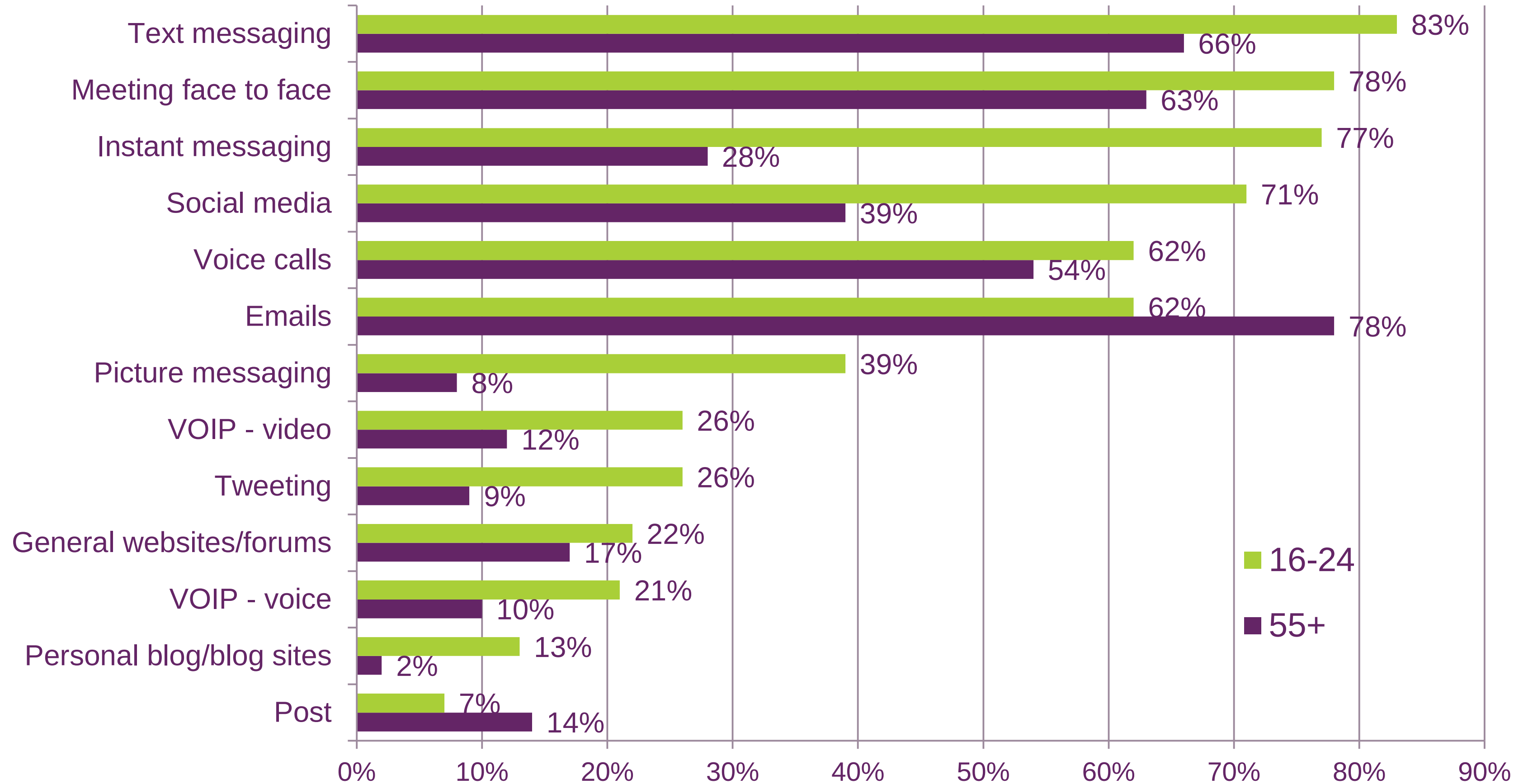
Methods of communicating with friends and family, all adults 16+



Source: Ofcom Research, 'Connected Devices', May 2015
Q50. We would now like to touch upon how you keep in touch with people. Thinking about your personal communication in general, how often do you do/ use the following to communicate with friends and family?
Base: Total = 2290

Figure 1.69

Methods of communicating with friends and family: Once a week or more often (by age group)

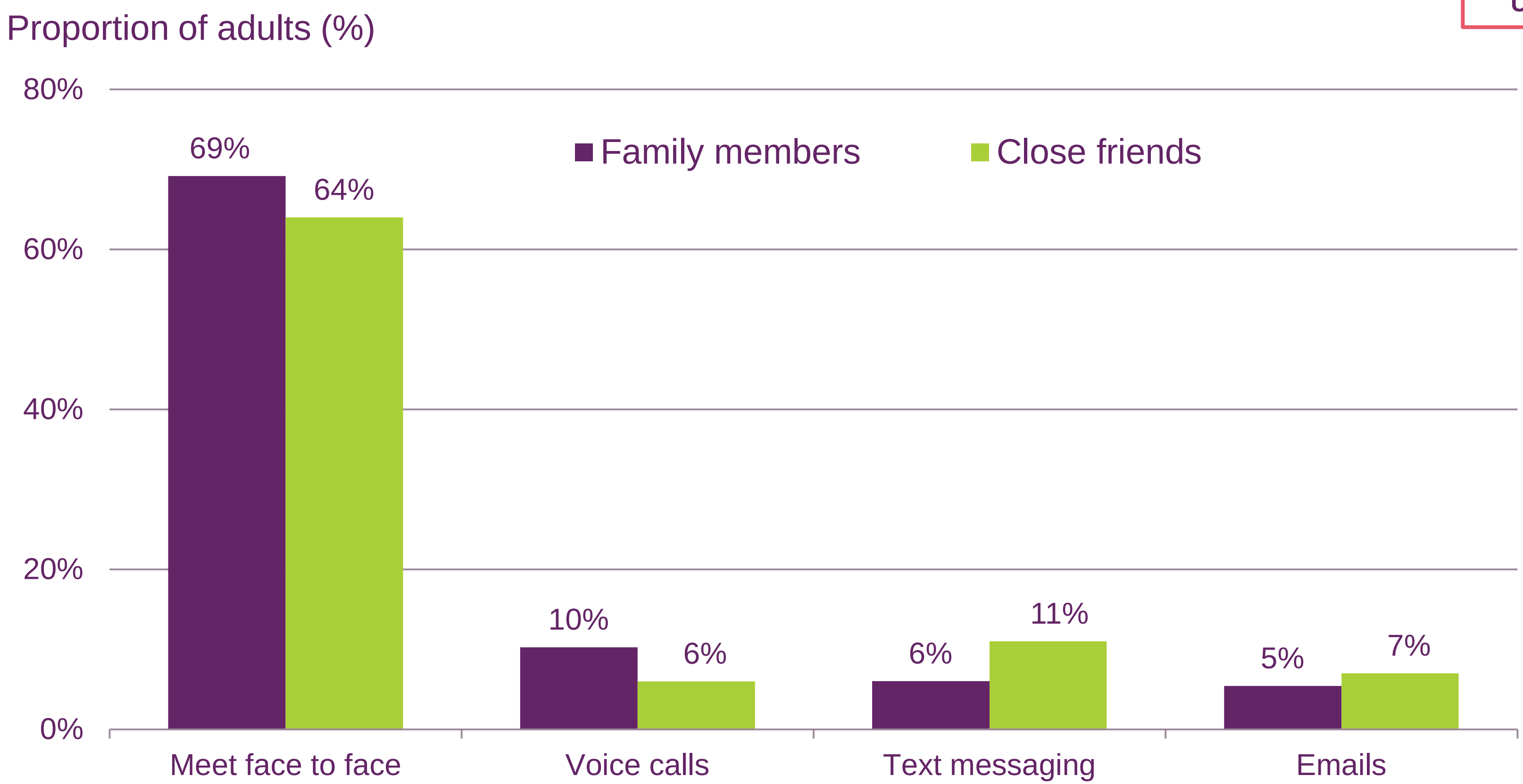


Source: Ofcom Research, 'Connected Devices', May 2015
Q50. We would now like to touch upon how you keep in touch with people. Thinking about your personal communication in general, how often do you do/use the following to communicate with friends and family?
Base:, 12-15= 515, 16-24= 321, 55+= 1019

Figure 1.70

Preferred methods of communicating with family and close friends

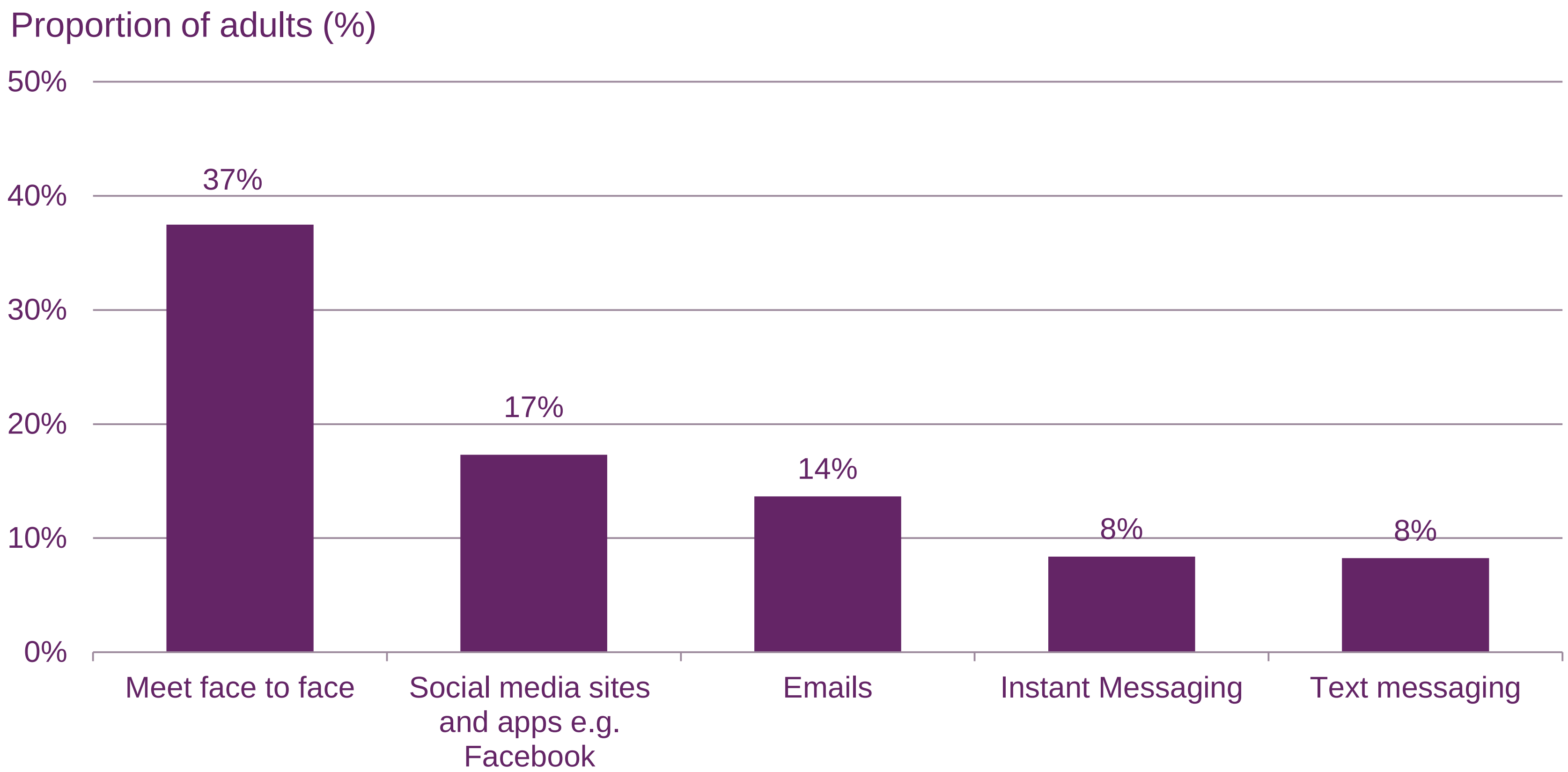
All responses over 5% for the UK charted



Source: Ofcom Research, ‘Connected Devices’, May 2015
Q52. And which one of these methods do you prefer to ….?
Base: All respondents=2039, 12-15= 461

Figure 1.71

Preferred methods of communicating with groups of family

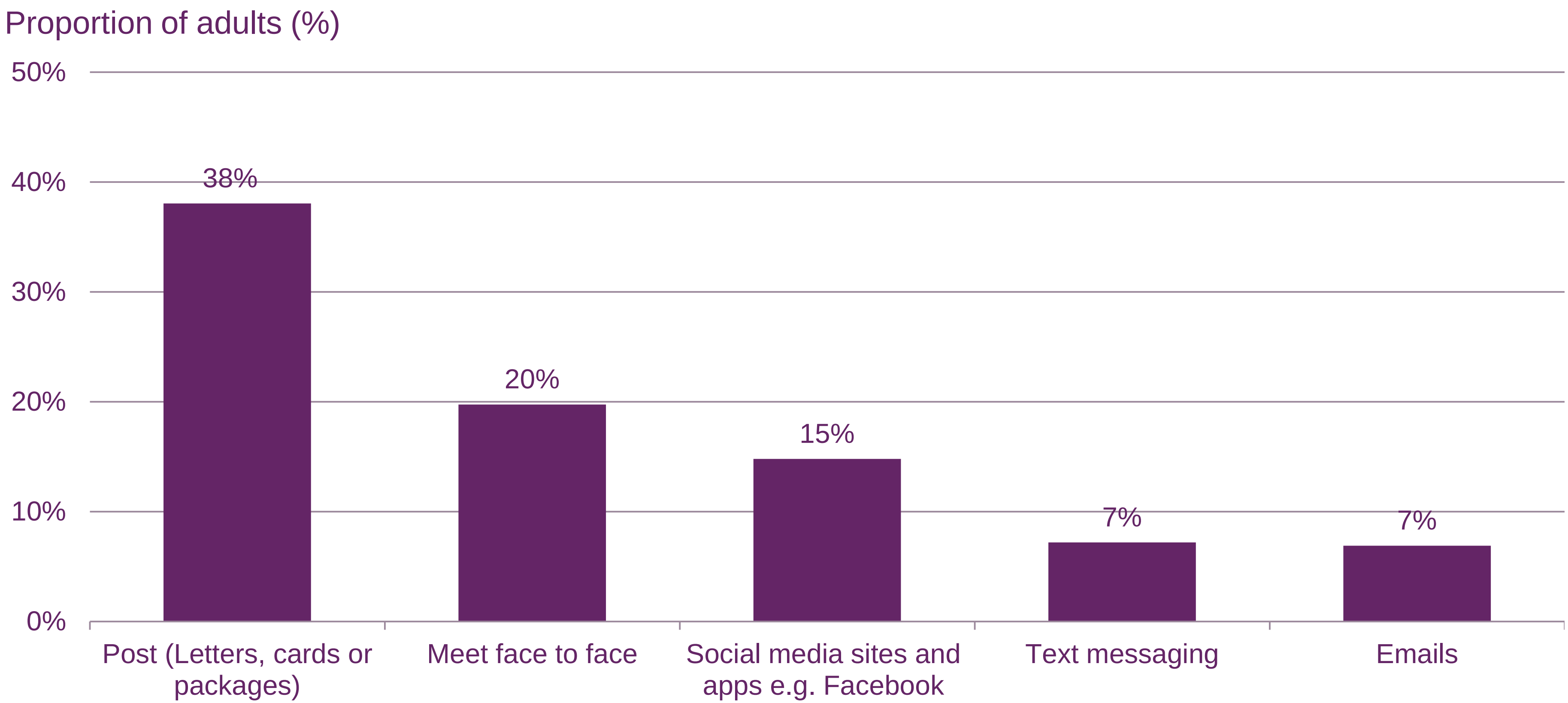


Source: Ofcom Research, 'Connected Devices', May 2015
Q52. And which one of these methods do you prefer to ….?
Base: All respondents=2039, 12-15= 461

All responses over 5% for the UK charted

Figure 1.72

Preferred method of sending birthday greetings and congratulations

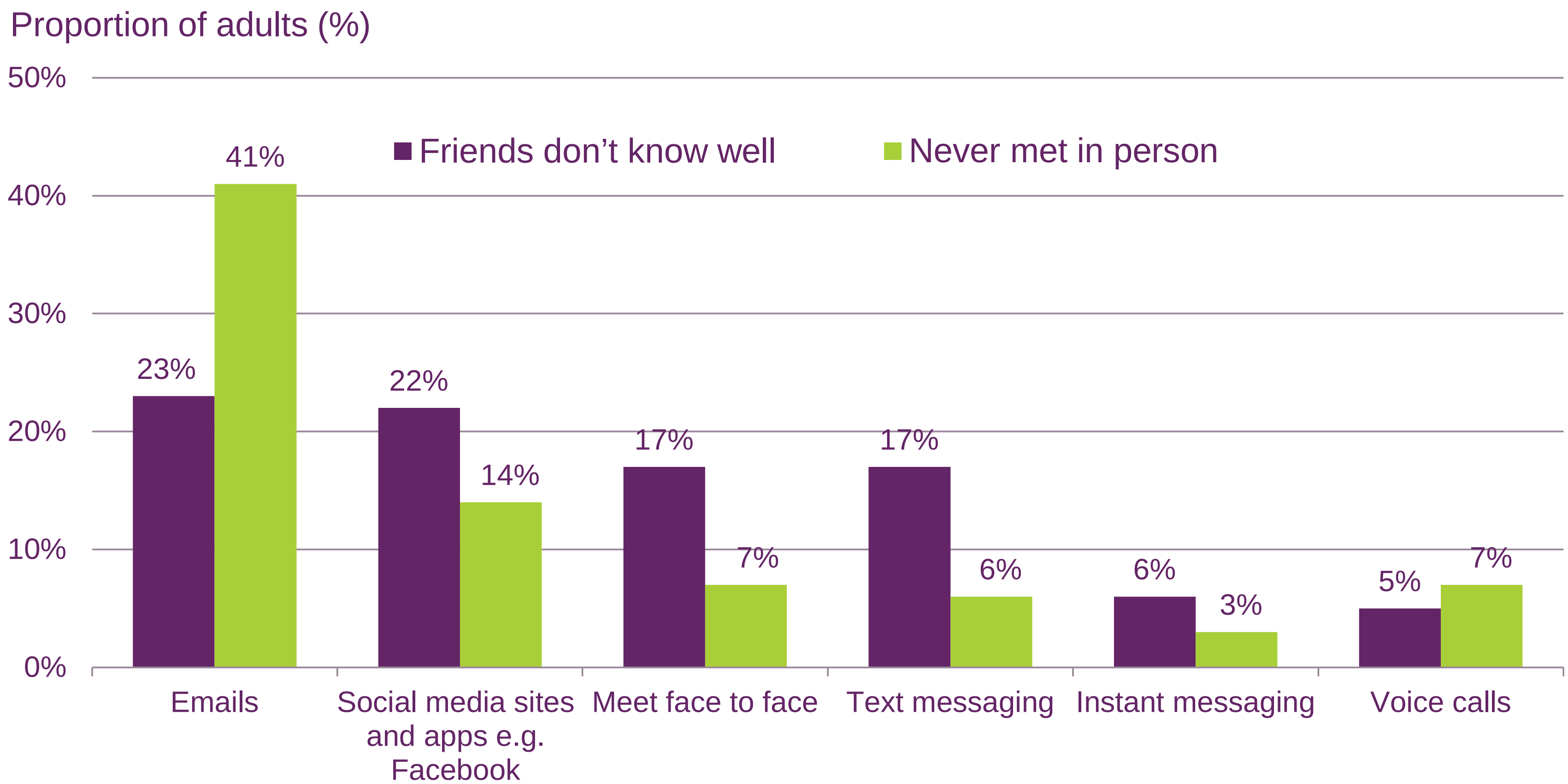


Source: Ofcom Research, ‘Connected Devices’, May 2015
Q52. And which one of these methods do you prefer to ….?
Base: All respondents=2039, 12-15= 461

All responses over 5% for the UK charted

Figure 1.73

Preferred method of communicating with people not known so well

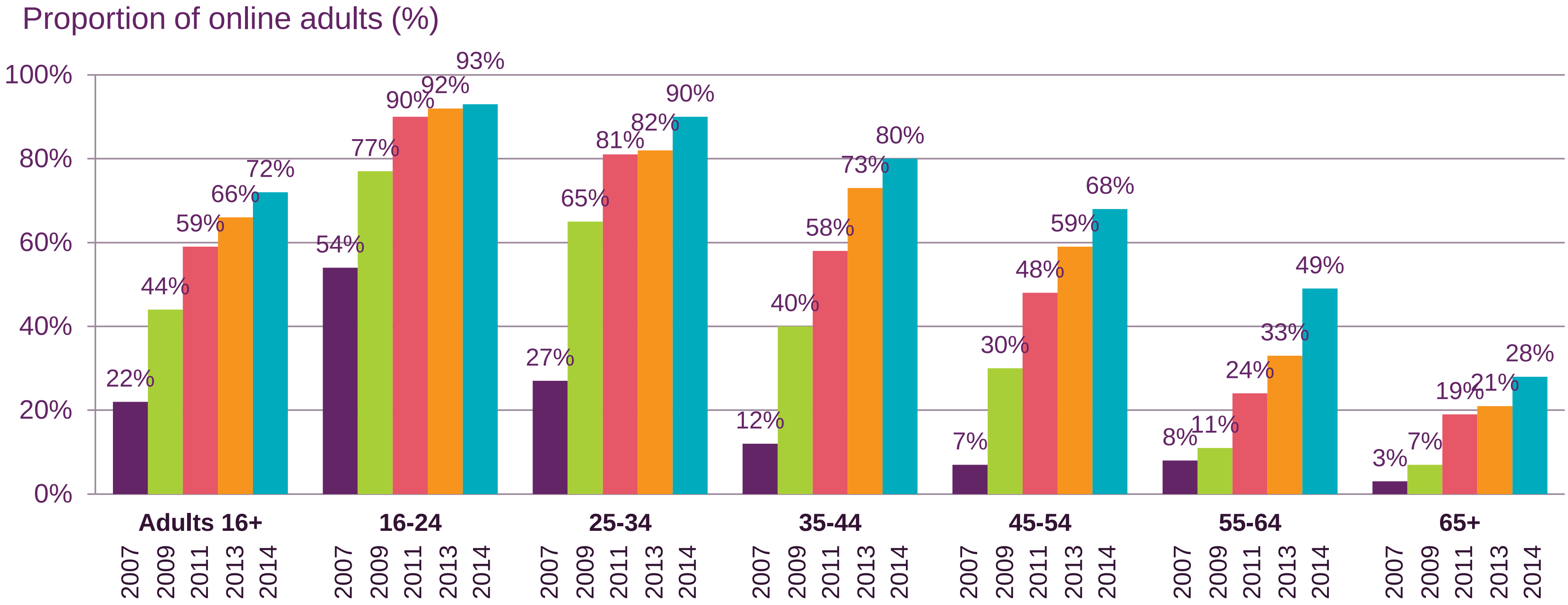


Source: Ofcom Research, 'Connected Devices', May 2015
Q52. And which one of these methods do you prefer to ….?
Base: All respondents=2039, 12-15= 461

Social media developments

Figure 1.74

Incidence of having a social media profile, by age: 2007-2014

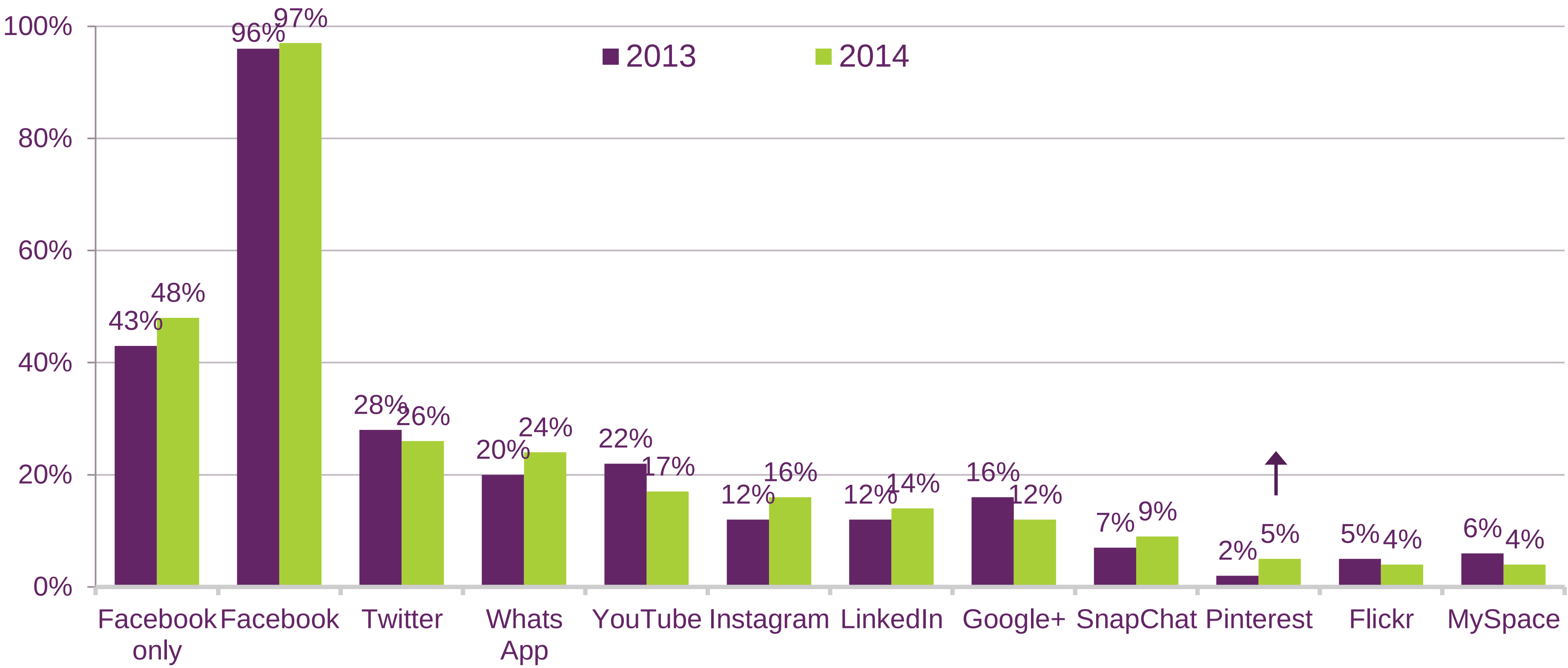


Source: Ofcom's Adult Media Use and Attitudes Report 2015
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014)
IN24. I'd now like to ask you some questions about social media (description of social media). Do you have a social media profile or account on any sites or apps

Figure 1.75

Social media sites used by those with a social media profile: 2013 and 2014

Proportion of all adults with a social media profile (%)

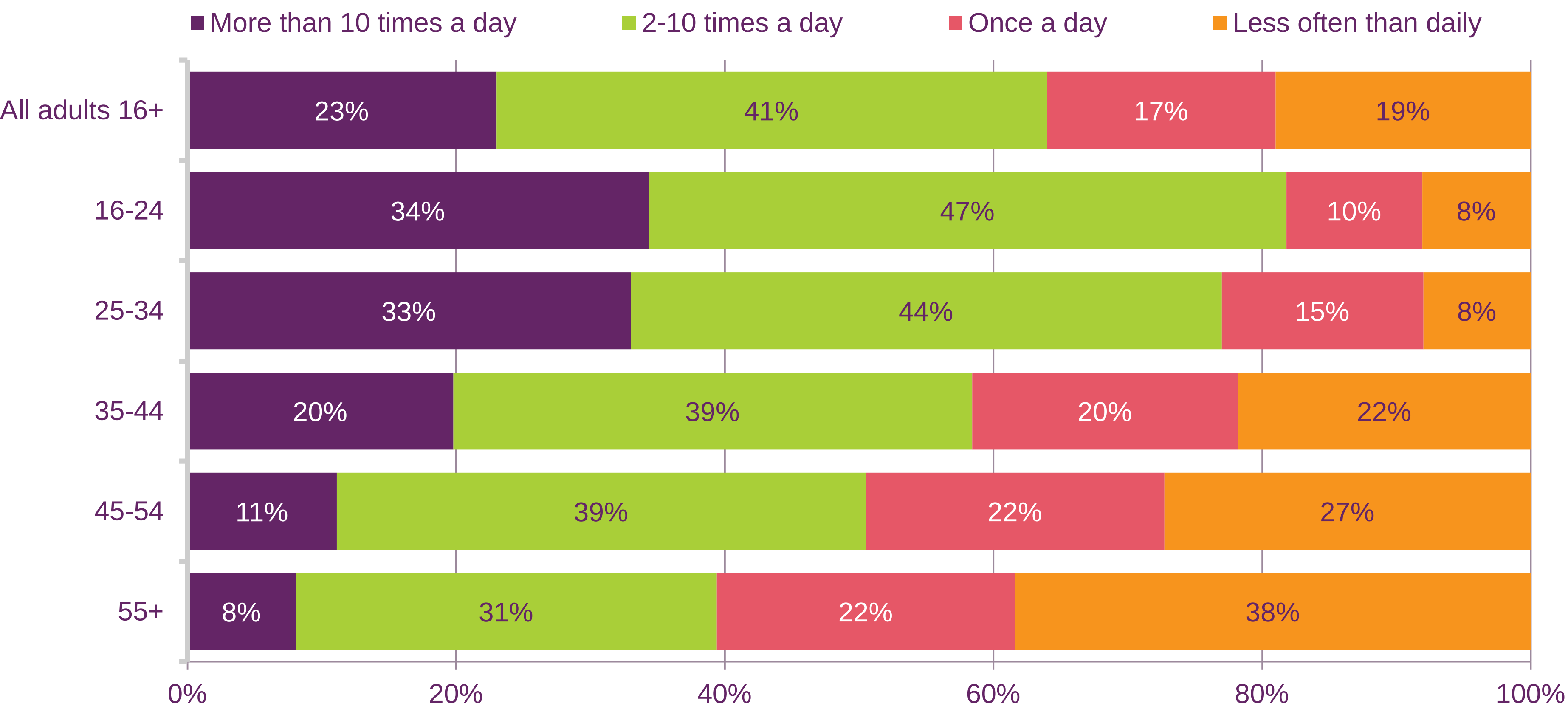


Source: Ofcom's Adult Media Use and Attitudes Report 2015
Base: All adults aged 16+ with a social media profile (1093 in 2014).
IN25 – Which sites or apps do you have a page or profile on?
Responses of 3% or more shown
Arrows show significant changes (99% level) between 2013 and 2014

Figure 1.76

Frequency of visiting any social media sites or apps, by age

Proportion of all adults with a social media profile (%)

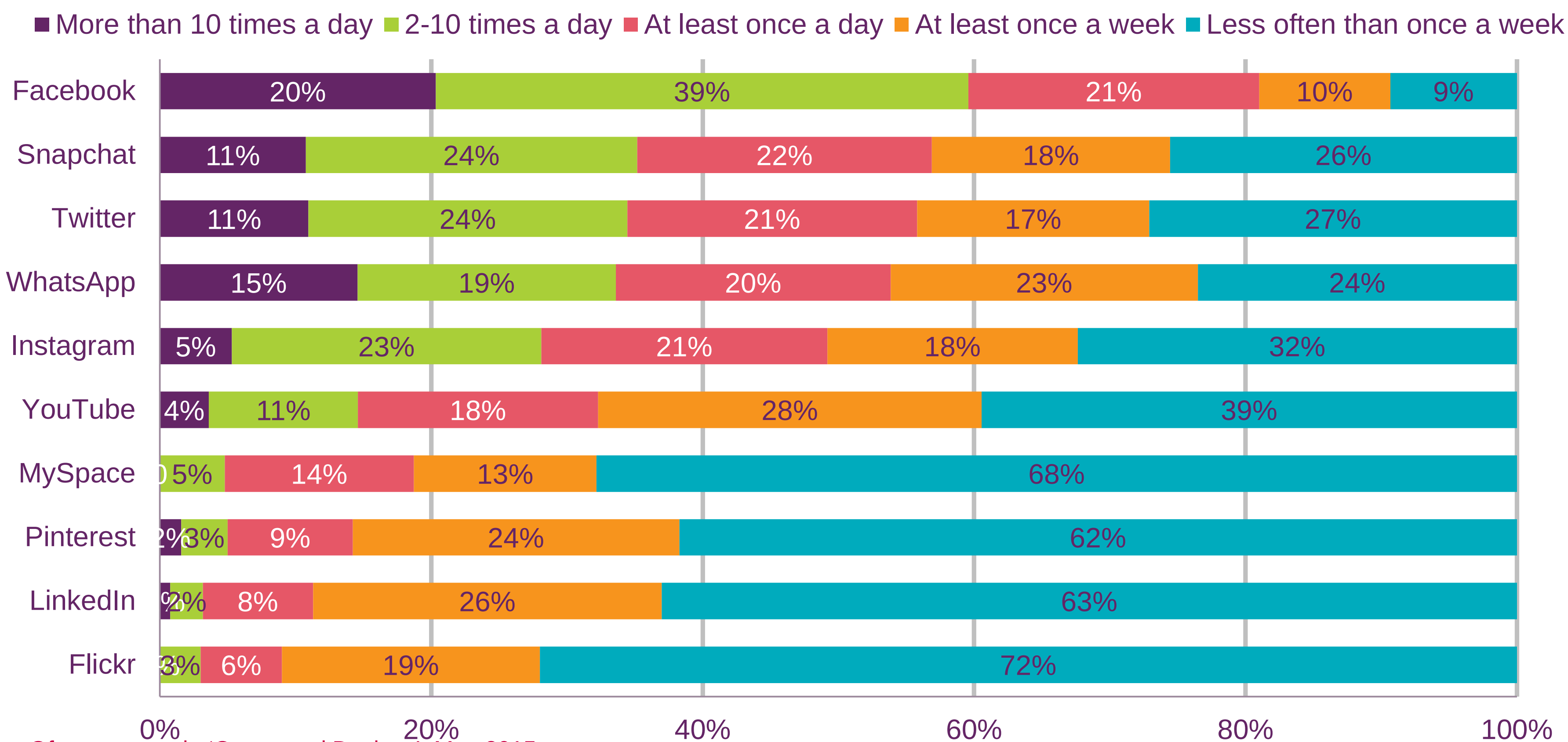


Source: Ofcom's Adult Media Use and Attitudes Report 2015
Base: All with social media profile (1093 in 2014)
IN27– How often do you visit any social media sites or apps, using any device?

Figure 1.77

Frequency of social media or app use: all adults aged 16+ who have ever used each site

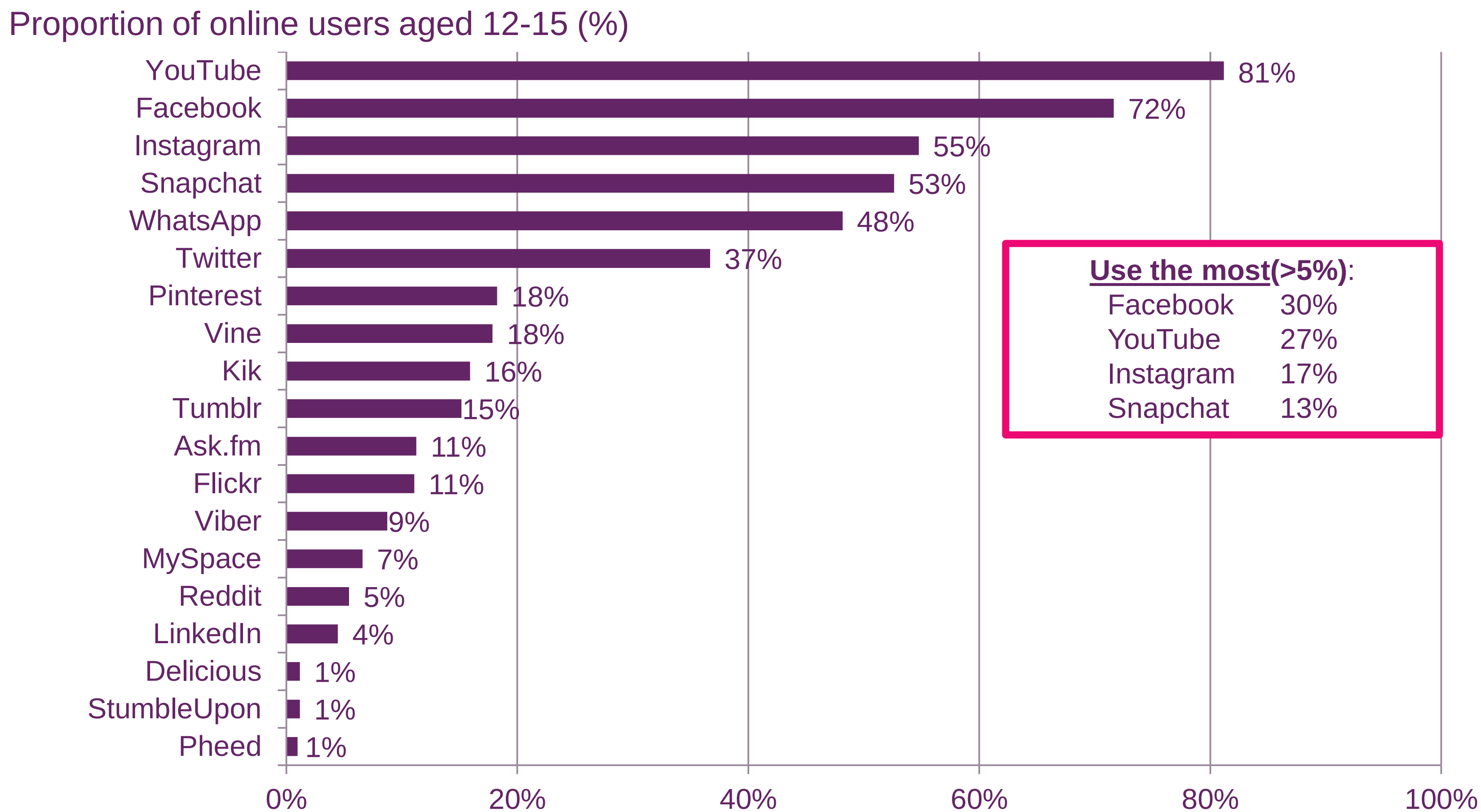
Proportion of current site users (%)



Source: Ofcom research, ‘Connected Devices’, May 2015
Base: All adults who have ever used each site from Q60 (various)
Q65. And how often do you use the following ….?
Note: Selected on the top ten sites used from the prompted list at Q60 and ranked on ‘at least once a day’

Figure 1.78

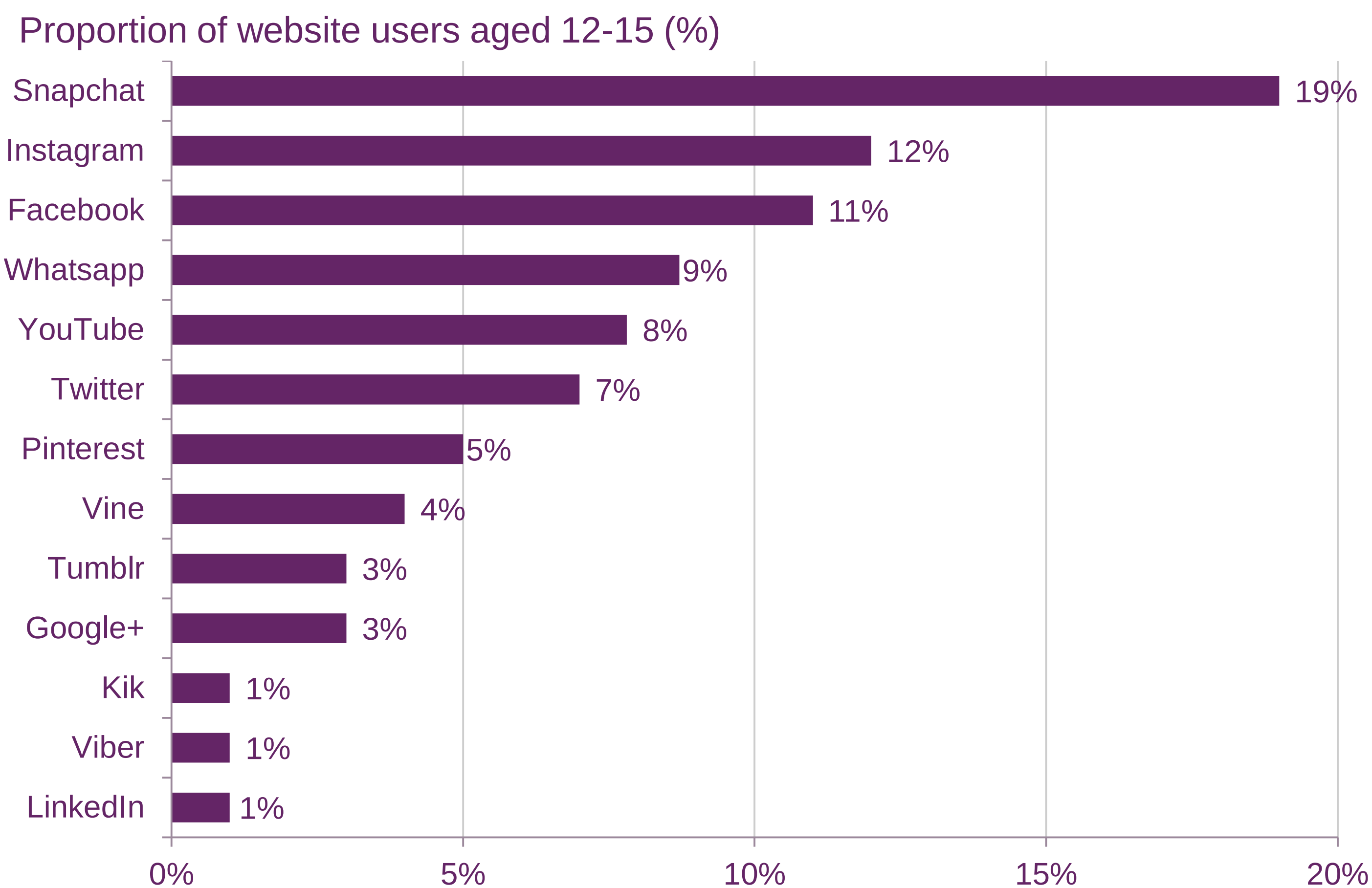
Site and app use among 12-15 year olds



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All respondents aged 12-15= 515
Q60. Which of the following websites have you ever used? Please select all that apply.
Q61a. Which one do you use the most?

Figure 1.79

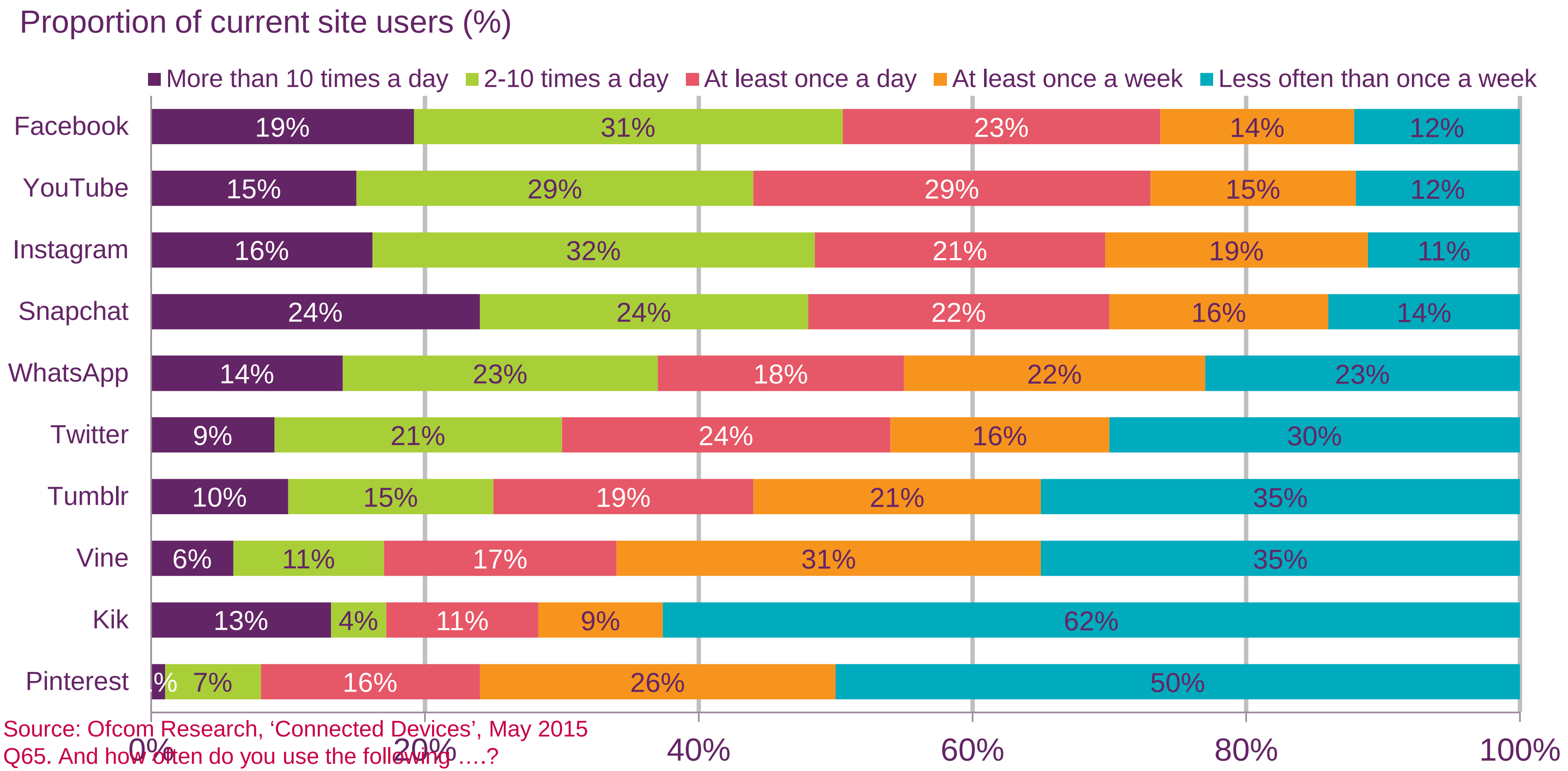
Site or app most recently added: 12-15 year olds



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All respondents aged 12-15= 515
Q60. Which of the following websites have you ever used? Please select all that apply.
Q61a. Which one do you use the most?

Figure 1.80

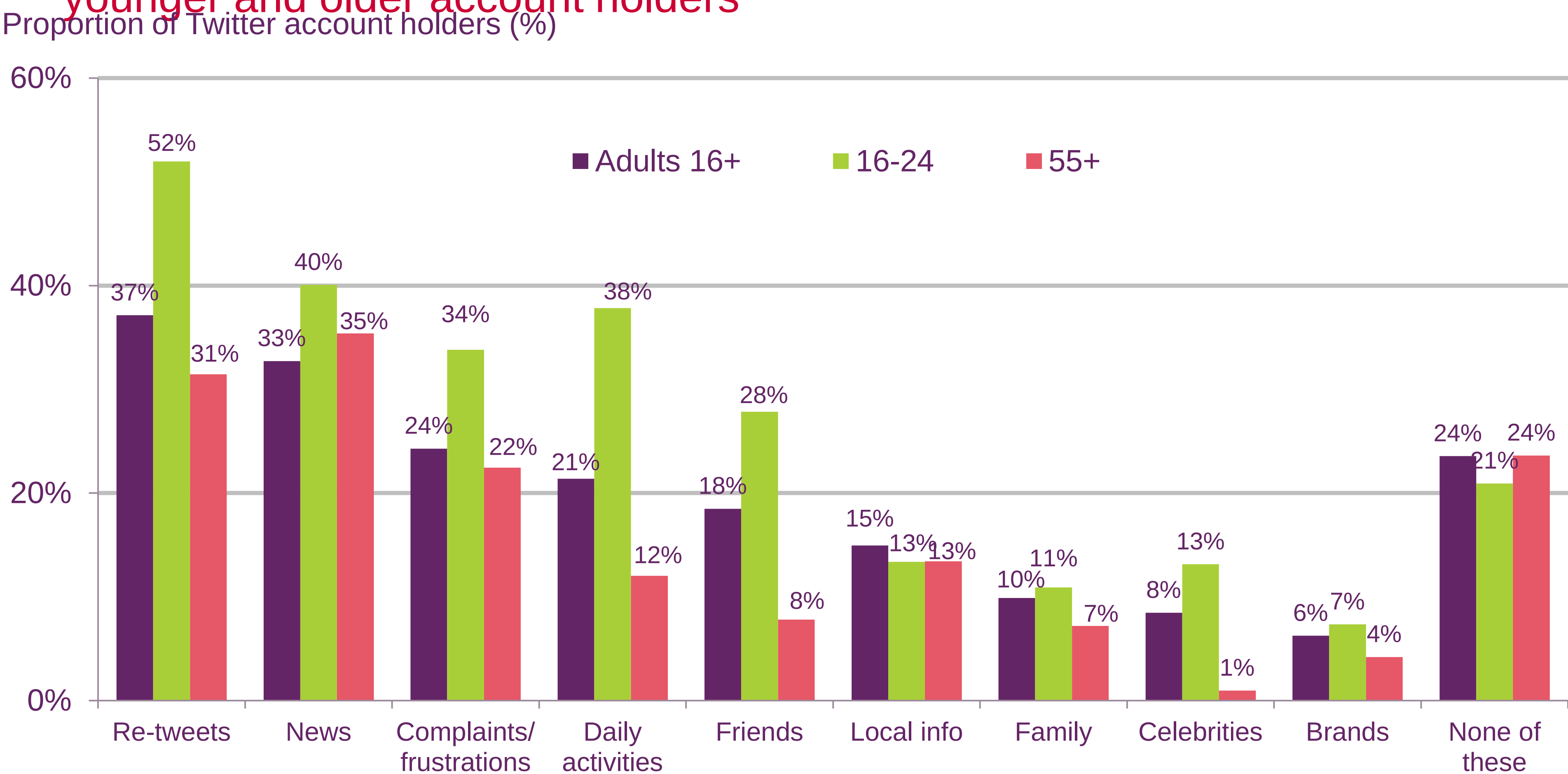
Frequency of use of social media sites or app usage: 12-15 year olds



Source: Ofcom Research, 'Connected Devices', May 2015
Q65. And how often do you use the following….?
Base: All current users of each website (various)

Figure 1.81

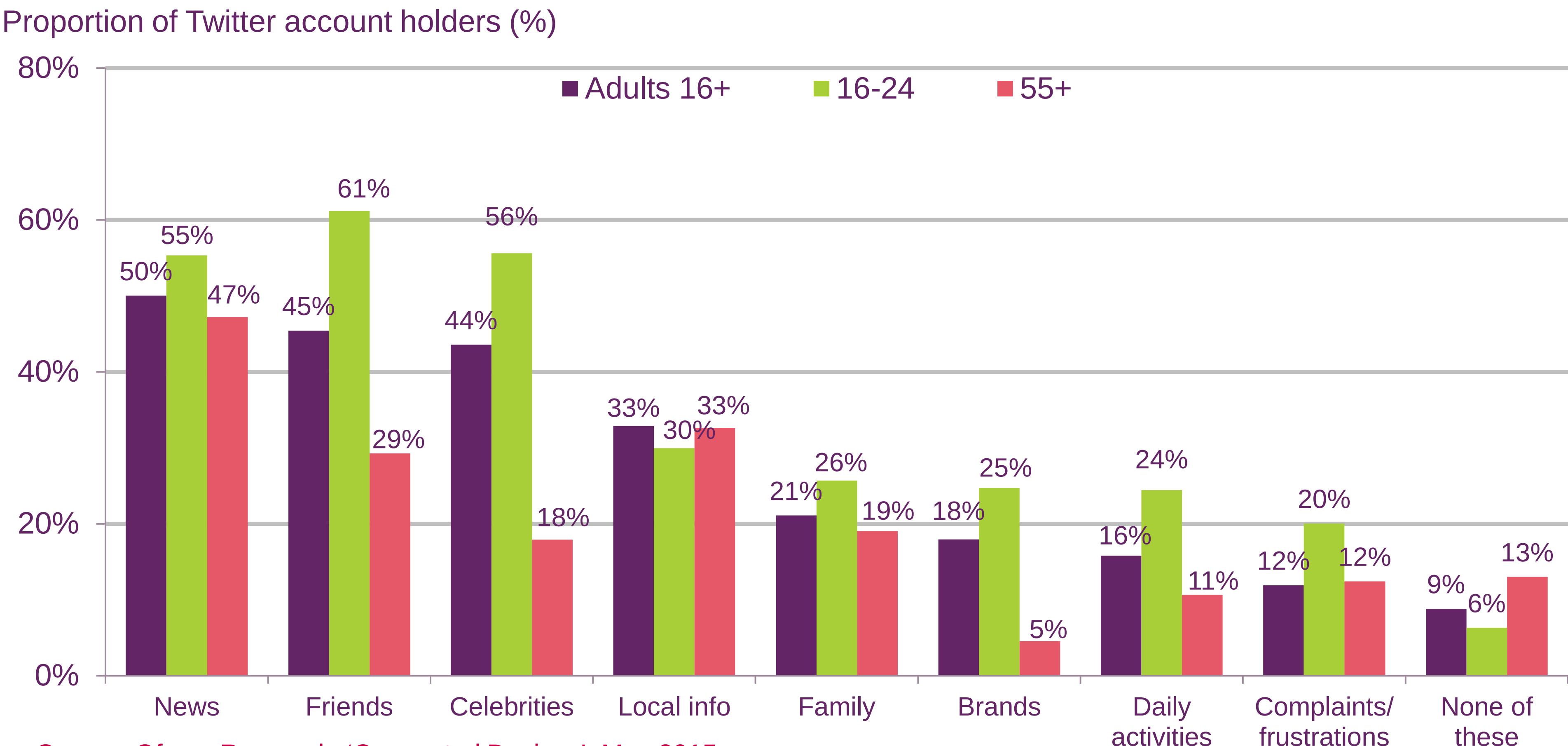
Type of topics 'tweeted' about, all adult account holders compared to younger and older account holders



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All Twitter account holders =822,16-24= 191, 55+=151
Q69a. What do you usually post your tweets about? Please select all that apply.

Figure 1.82

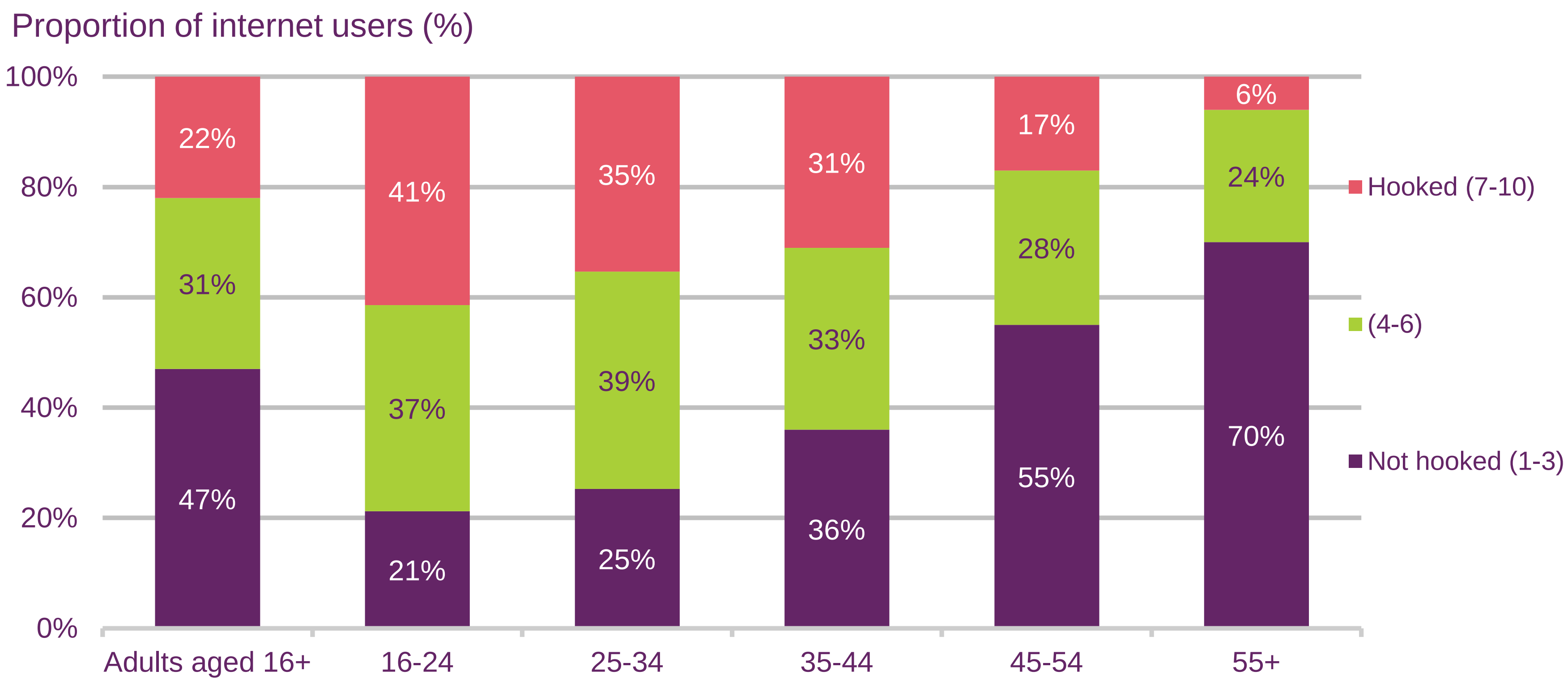
Type of Twitter feeds followed, by all adult account holders, and by younger and older account holders



Source: Ofcom Research, 'Connected Devices', May 2015
Base: All Twitter account holders =822, 12-15= 168,16-24= 191, 25-34= 169, 35-44=184, 45-54=126, 55+=151
Q71. And what types of Twitter feeds do you follow? Please select all that apply.

Figure 1.83

Extent to which people are ‘hooked’ on social media, by age

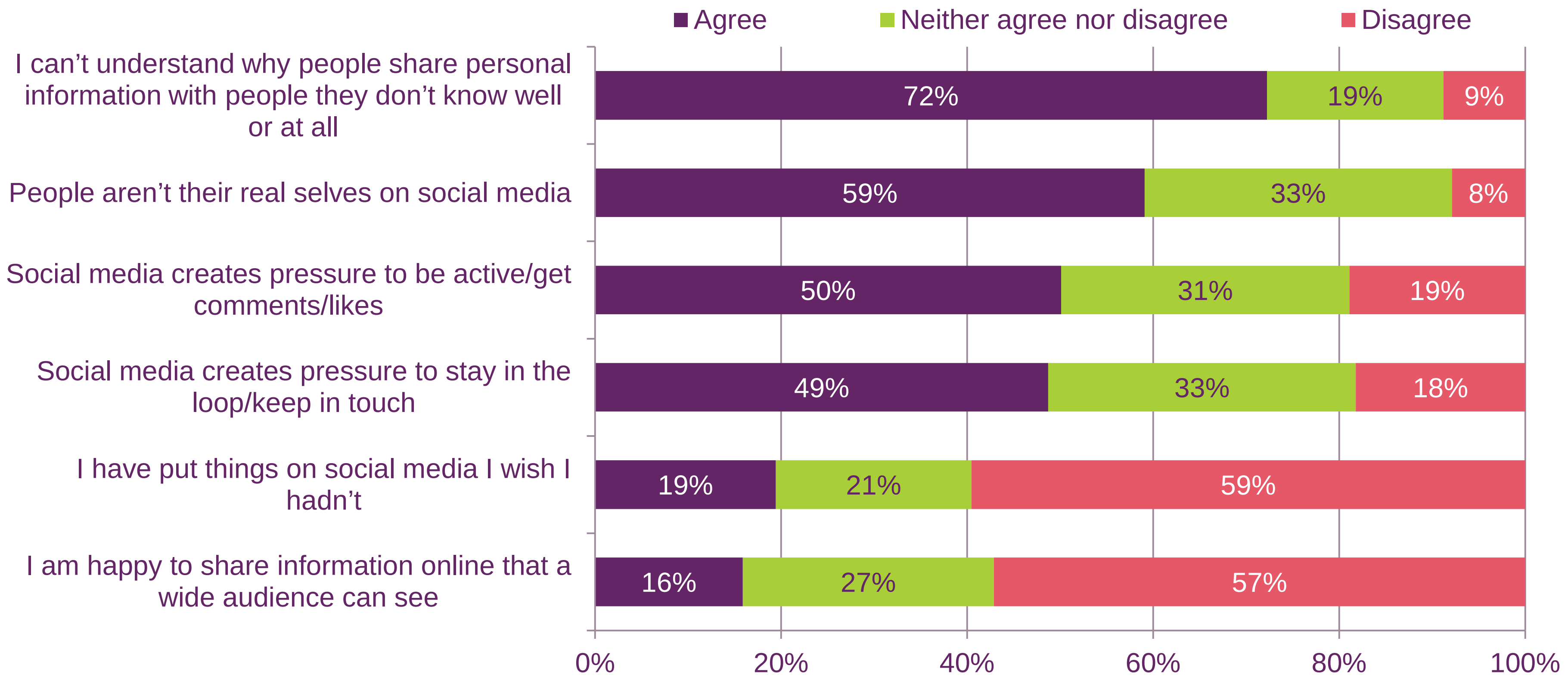


Source: Ofcom research, ‘Connected Devices’, May 2015
Base: All online adults 16+ =2290, 16-24= 321, 25-34= 223, 35-44= 334, 45-54= 393, 55+= 1019
Q91. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on social media' and 10 represented 'I'm completely hooked on social media ', which number would you choose for yourself?

Figure 1.84

Level of agreement with statements about social media

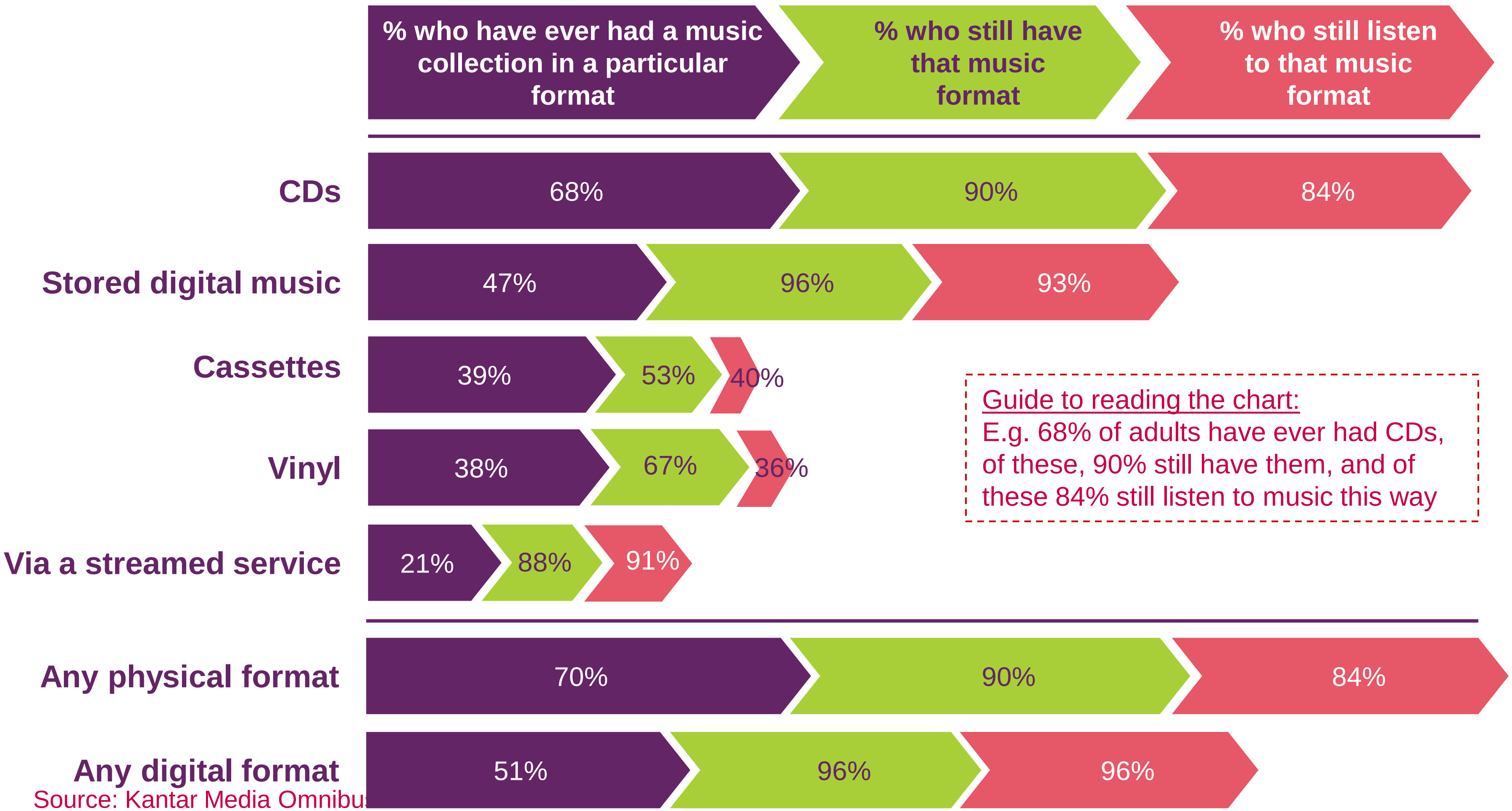
Proportion of internet users (%)



Source: Ofcom Research, 'Connected Devices', May 2015
Q90 How much do you agree or disagree with the following statements regarding social media?
Base: All respondents aged 16+= 2290

Digital music and photograph collections

Figure 1.85
Retention and use of music collections



Source: Kantar Media Omnibus

Base: All adults 16+ in the UK who have ever had each format (CDs = 1390, Digital music = 895, Cassette tapes = 799, Vinyl records = 803, On a music streaming service = 387)

Base: All adults 16+ in the UK who still own each format (CDs = 1274, Digital music = 857, Cassette tapes = 455, Vinyl records = 555, On a music streaming service = 341)

Q1. Have you ever had a personal music collection in any of the following formats, Q2. Which of these collections do you still have, Q3. Which of these collections do you still listen to?

Figure 1.86

Music formats listed to instead of physical formats

% of those who still own each physical format but no longer listen to it

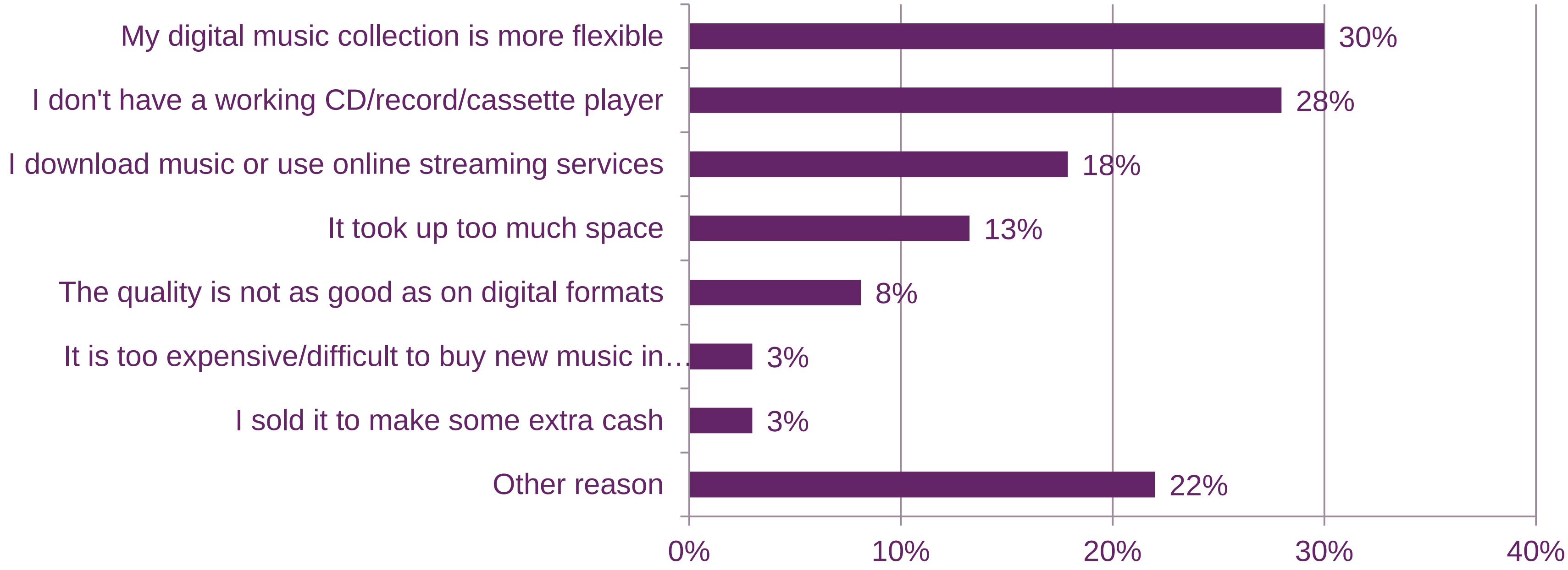
Music format still listened to	Physical music format owned but no longer listened to that way: Vinyl	Cassette	CD
Vinyl	-	11%	7%
Cassette	9%	-	3%
CD	76%	80%	-
Stored digital music	51%	53%	65%
Streamed music service	17%	18%	27%
Any physical format	77%	81%	8%
Any digital format	54%	57%	74%

Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever owned a personal music collection but no longer listen to it (Vinyl records = 340, Cassette tapes = 258, CDs = 207)
Q3. Which of these collections do you still listen to?

Figure 1.87

Reasons no longer have / listen to particular music collections

% of those who ever had particular music formats and no longer have / or no longer listen to music that way

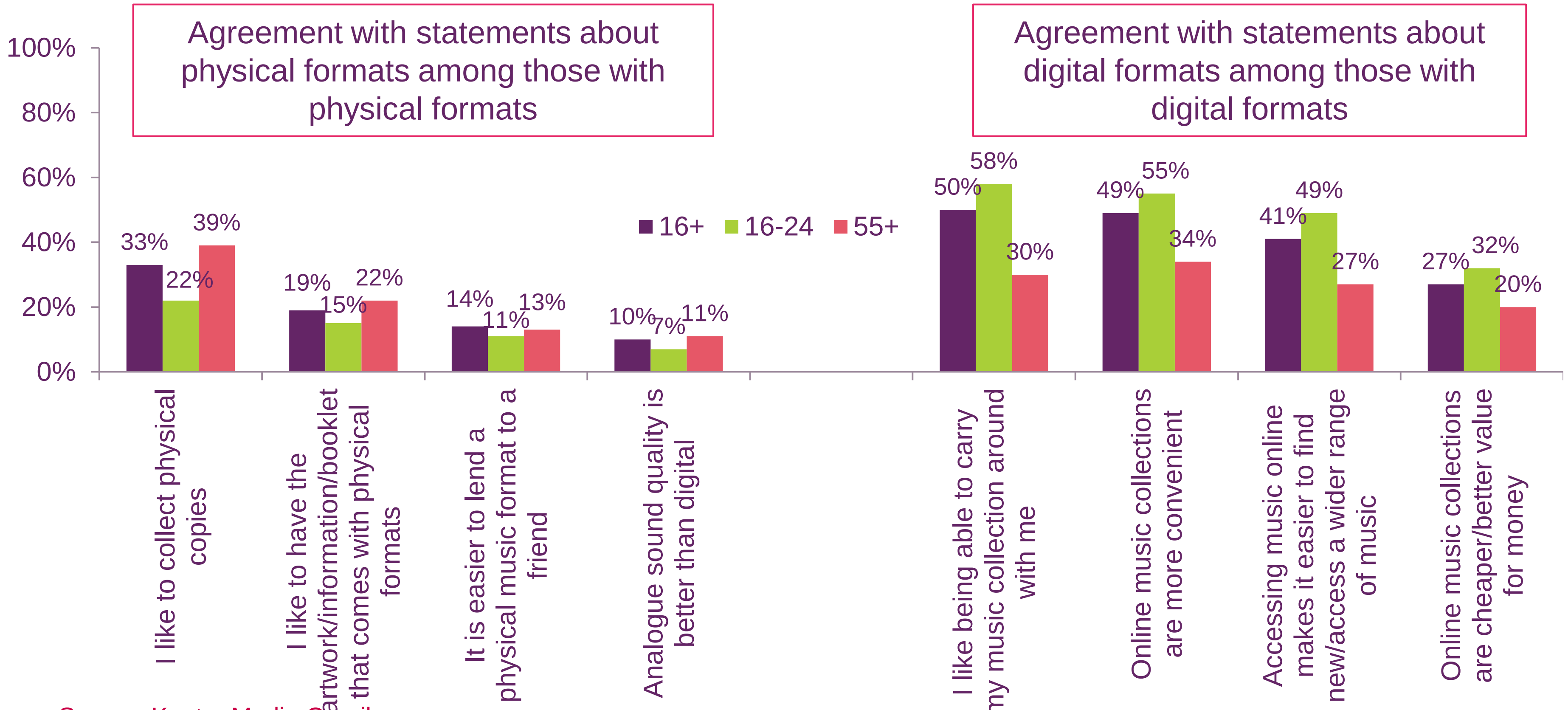


Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever owned a personal music collection. Data re-based to exclude those who answer 'I still own/listen to my music collection' (N = 569)
Question: Q4. If you no longer own or listen to your music collection, can you please tell me why that is?

Figure 1.88

Level of agreement with statements about music formats, by age

% of those who still have physical / digital music formats

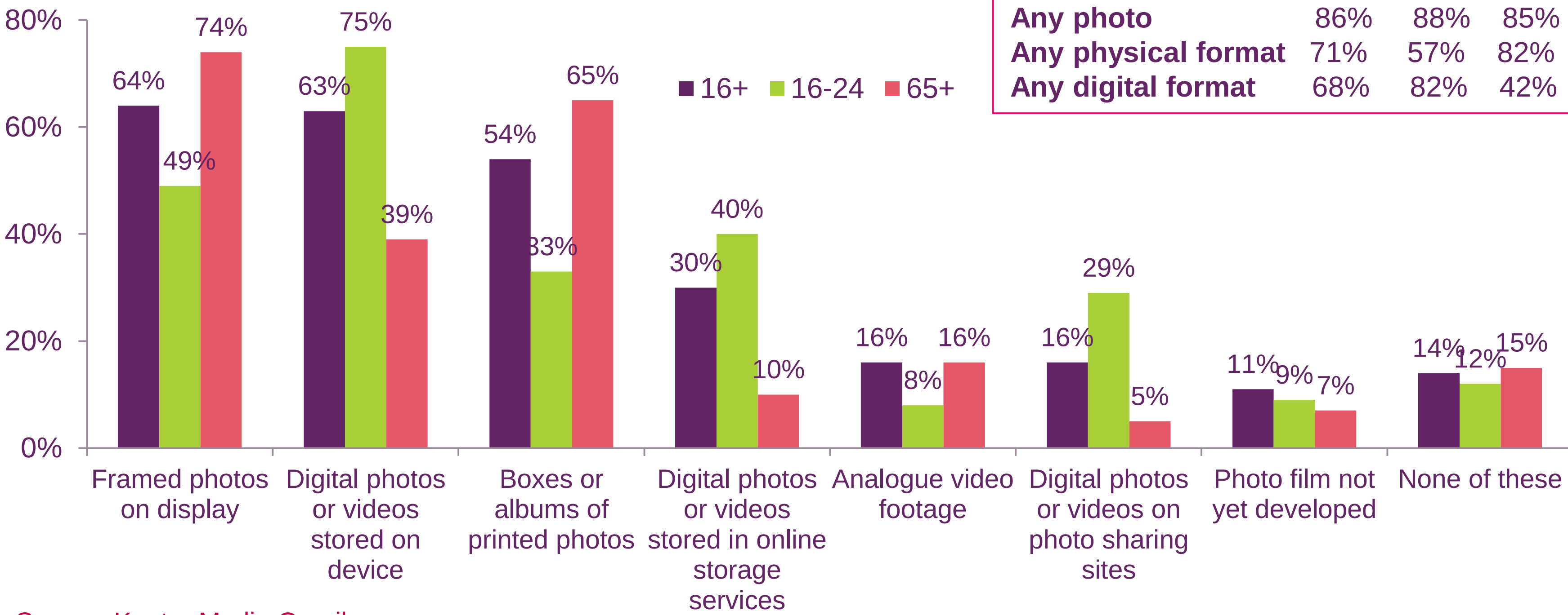


Source: Kantar Media Omnibus
Base: All adults in the UK who still own a physical music collection (16+ = 1321, 16-24 = 133, 55+ =620)
Base: All adults in the UK who still own a digital music collection (16+ = 925, 16-24 = 229, 55+ = 190)
Question: Q5. Thinking about different ways of listening to music, which of the following do you agree with?

Figure 1.89

Use of different photo formats

% of each age group

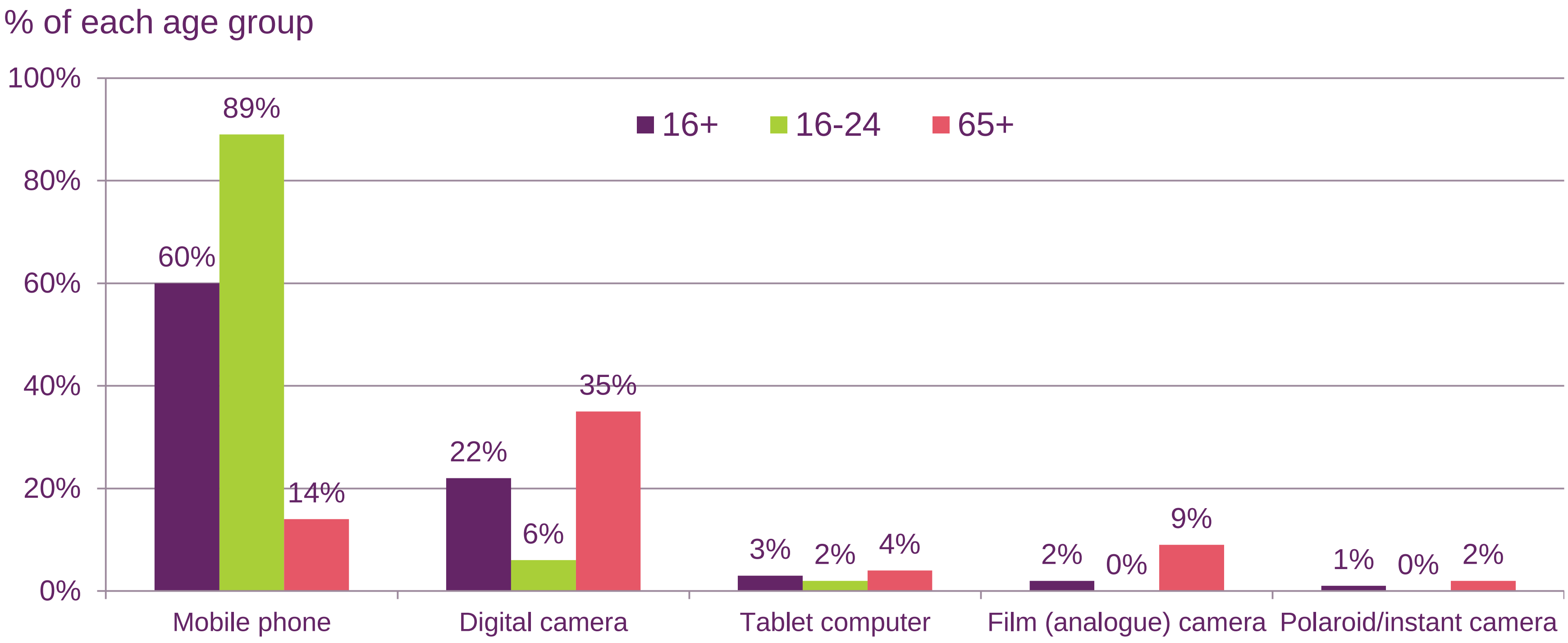


	16+	16-24	65+
Any photo	86%	88%	85%
Any physical format	71%	57%	82%
Any digital format	68%	82%	42%

Source: Kantar Media Omnibus
Base: 16+ = 2100, 16-24 = 308, 65+ = 589
Question: Q6. Do you have any of the following?

Figure 1.90

Device most often used to take photos

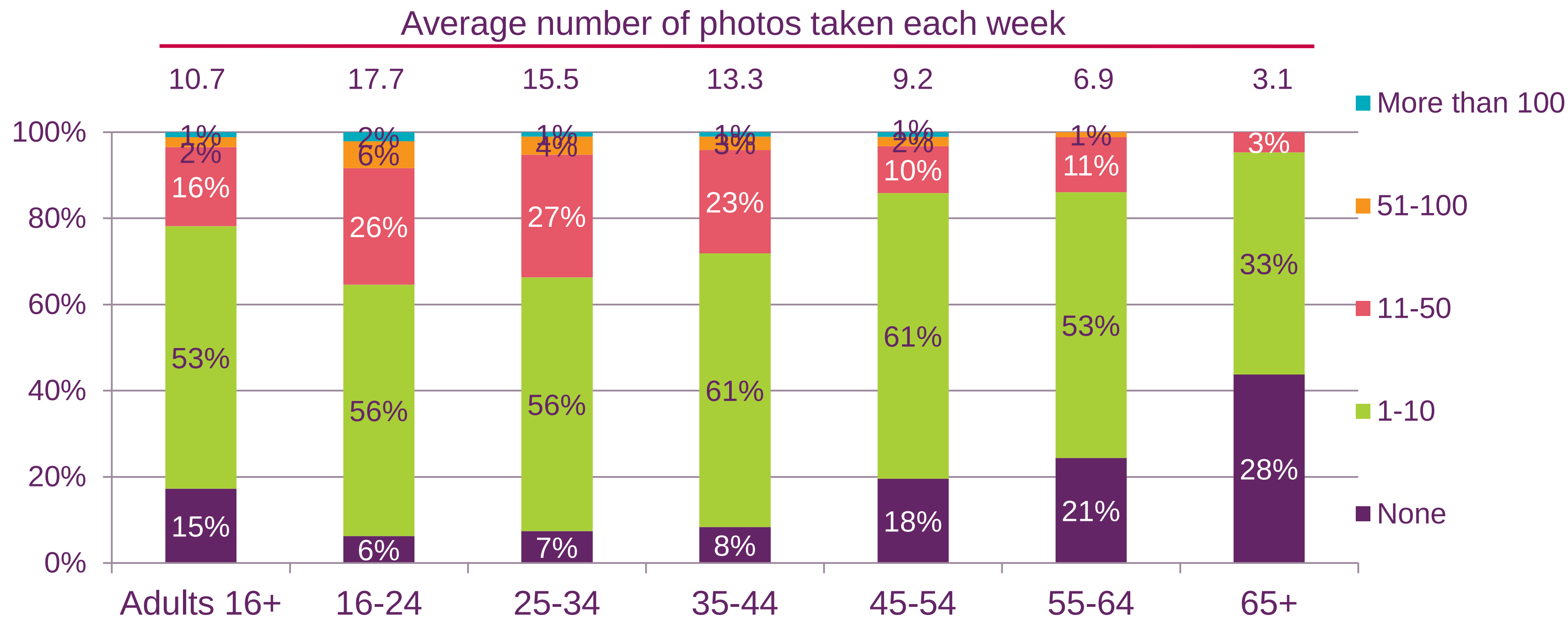


Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (16-24 = 298, 25-34 = 291, 35-44 = 270, 45-54 = 287, 55-64 = 252, 65+ = 386)
Question: Q8. And which do you use most often?

Figure 1.91

Number of photos taken in an average week

% of each age group

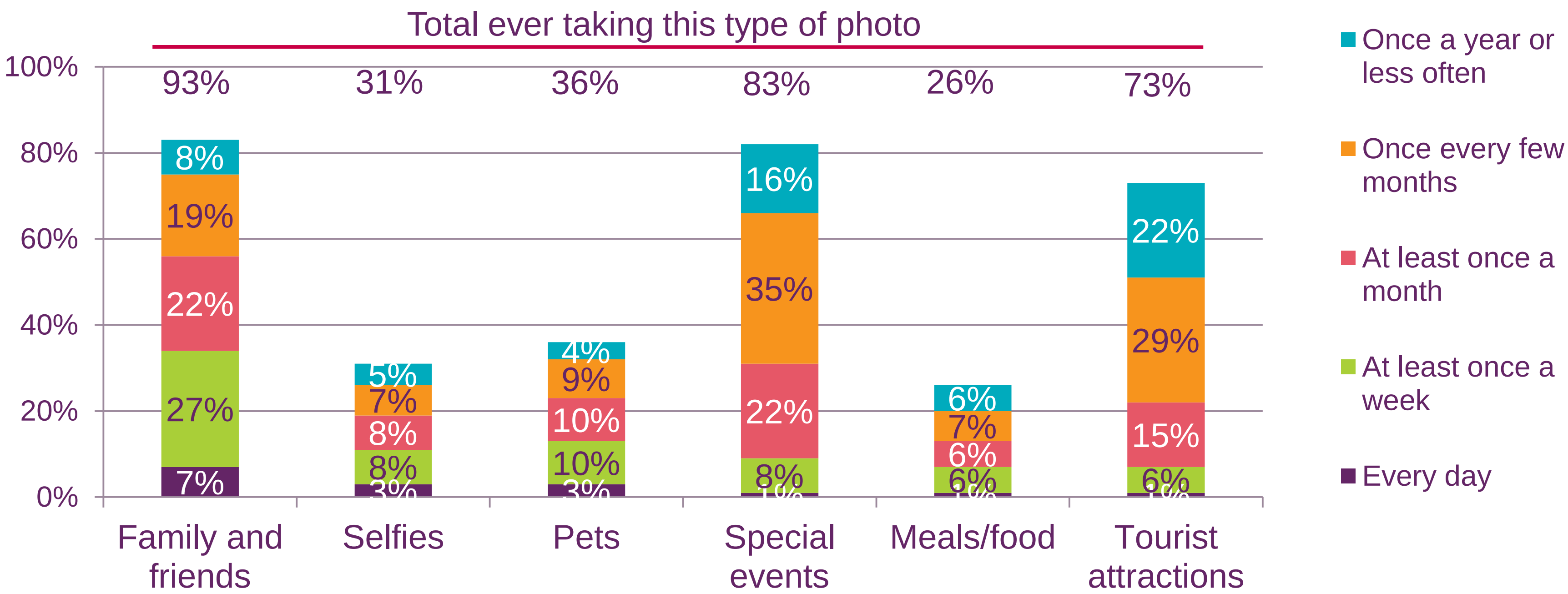


Source: Kantar Media Omnibus
Base: All UK adults = 2100 (rebased): 16-24 = 296, 25-34 = 3801, 35-44 = 357, 45-54 = 337, 55-64 = 322, 65+ = 406)
Q9. On average, how many photos would you say you take a week?

Figure 1.92

Frequency of taking different types of photo

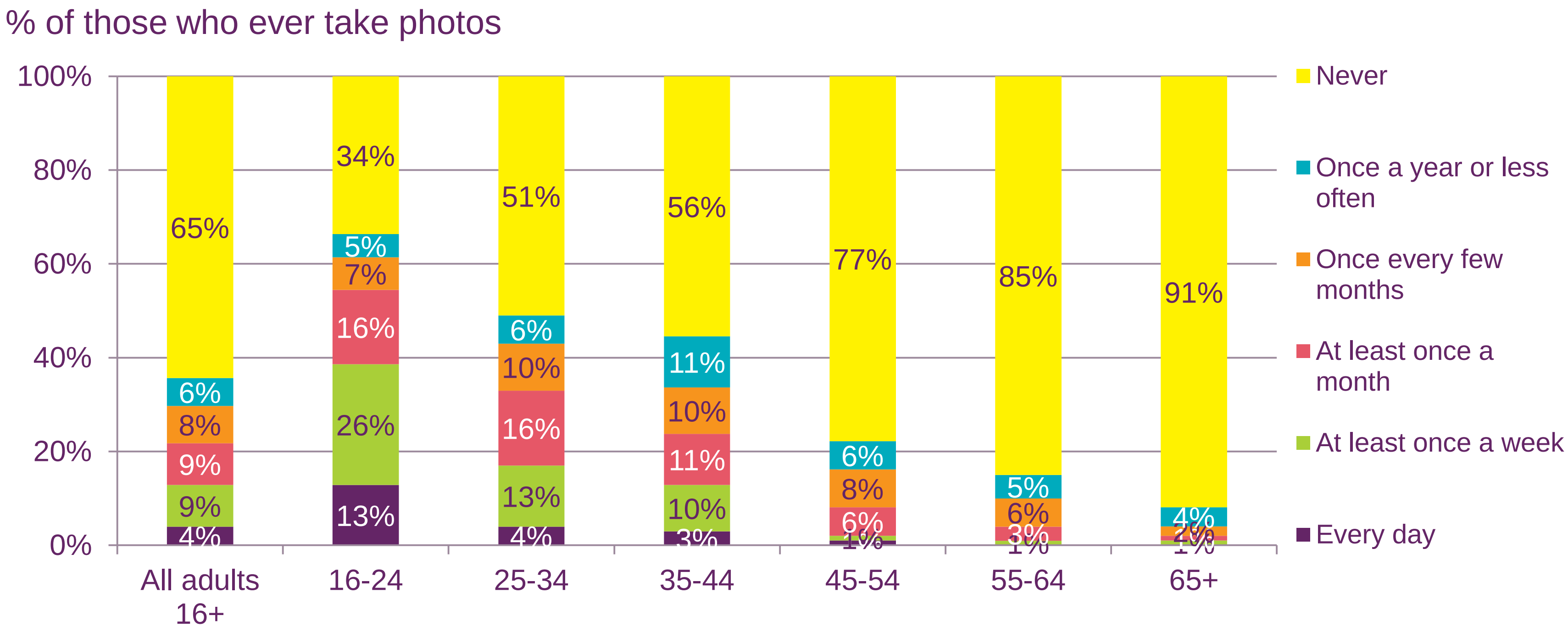
% of all UK adults



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N = 2100)
Question: Q10. When taking photos, how often do you take photos of the following?

Figure 1.93

Frequency of taking selfies, by age

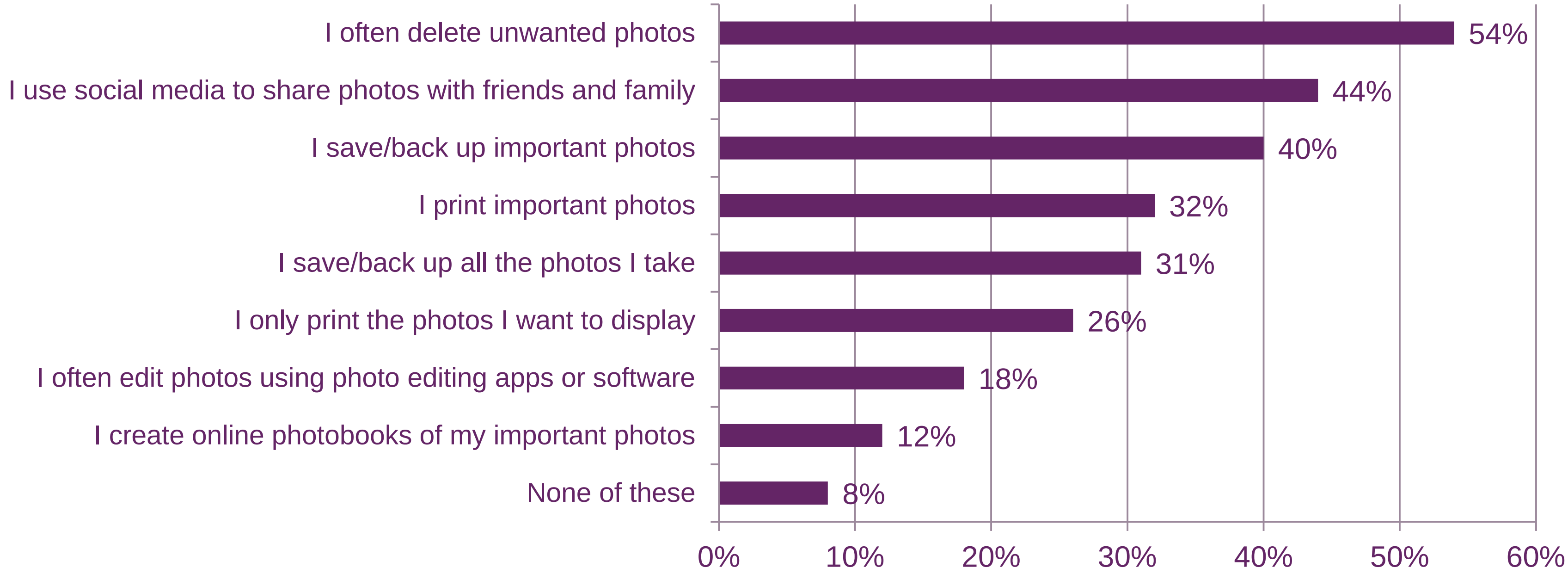


Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever take photos (All UK adults = 1784: 16-24 = 298, 25-34 = 291, 35-44 = 270, 45-54 = 287, 55-64 = 252, 65+ = 386)
Q10. When taking photos, how often do you take photos of the following?

Figure 1.94

Agreement with statements about digital photography

% of adults who ever use digital devices to take photos

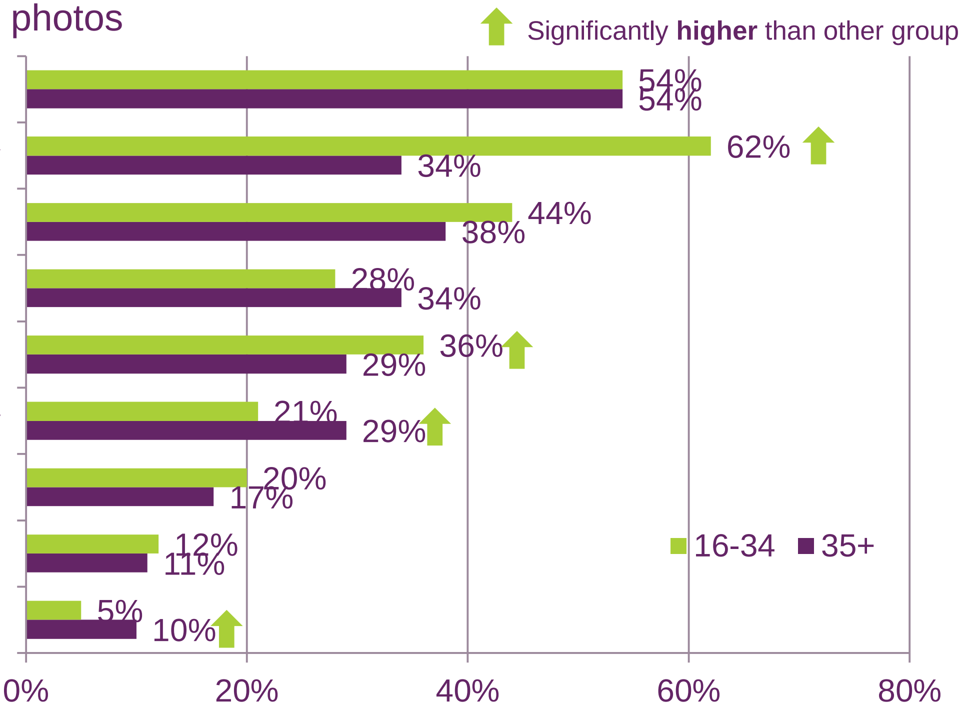


Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever use digital devices to take photos (N = 1717)
Q11. Thinking about the digital photos you take, which of the following applies to you?

Figure 1.95

Agreement with statements about digital photography, by age

% of those who ever use digital devices to take photos

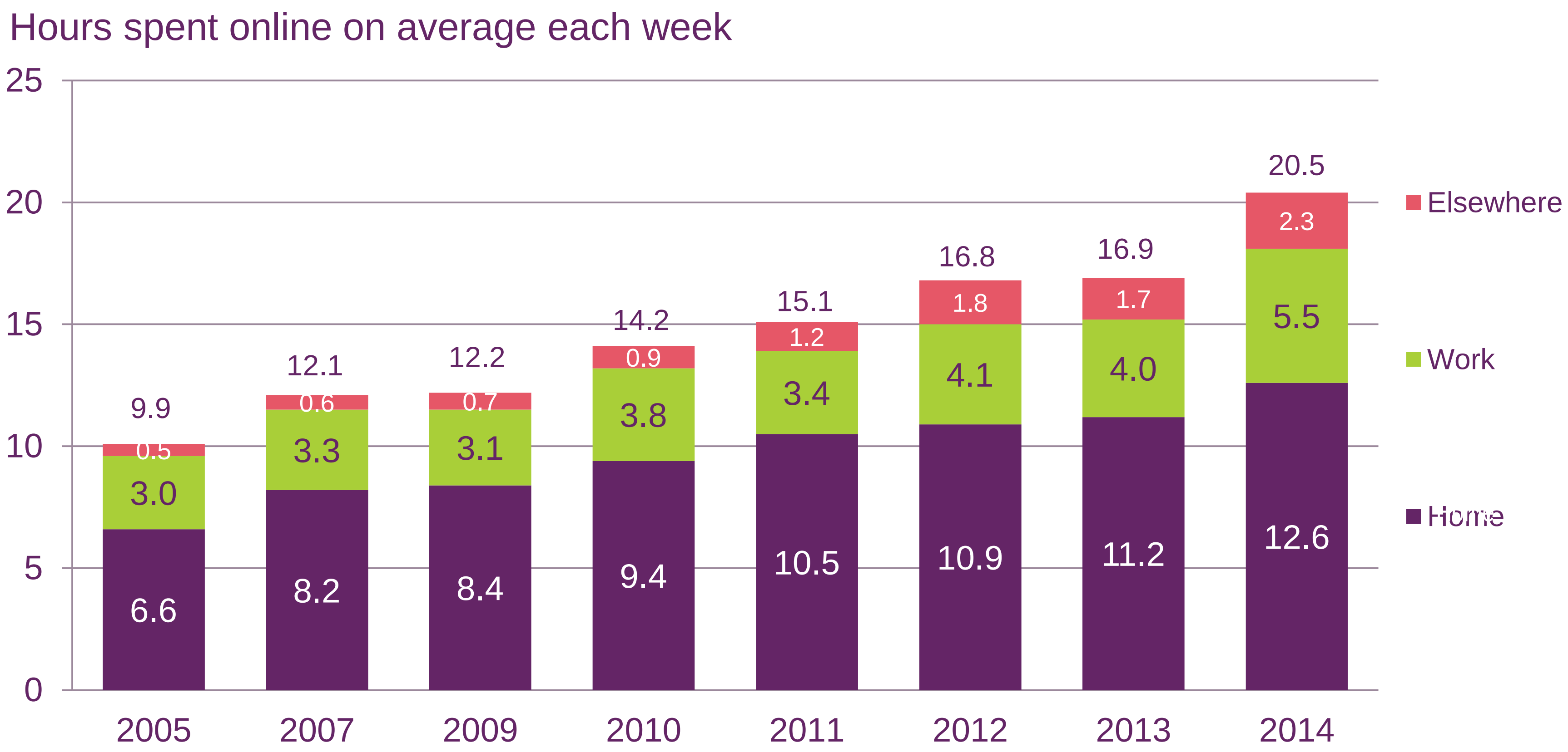


Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever use digital devices to take photos (16-34 = 587, 35+ = 1130)
Q11. Thinking about the digital photos you take, which of the following applies to you?

Media literacy: the past decade

Figure 1.96

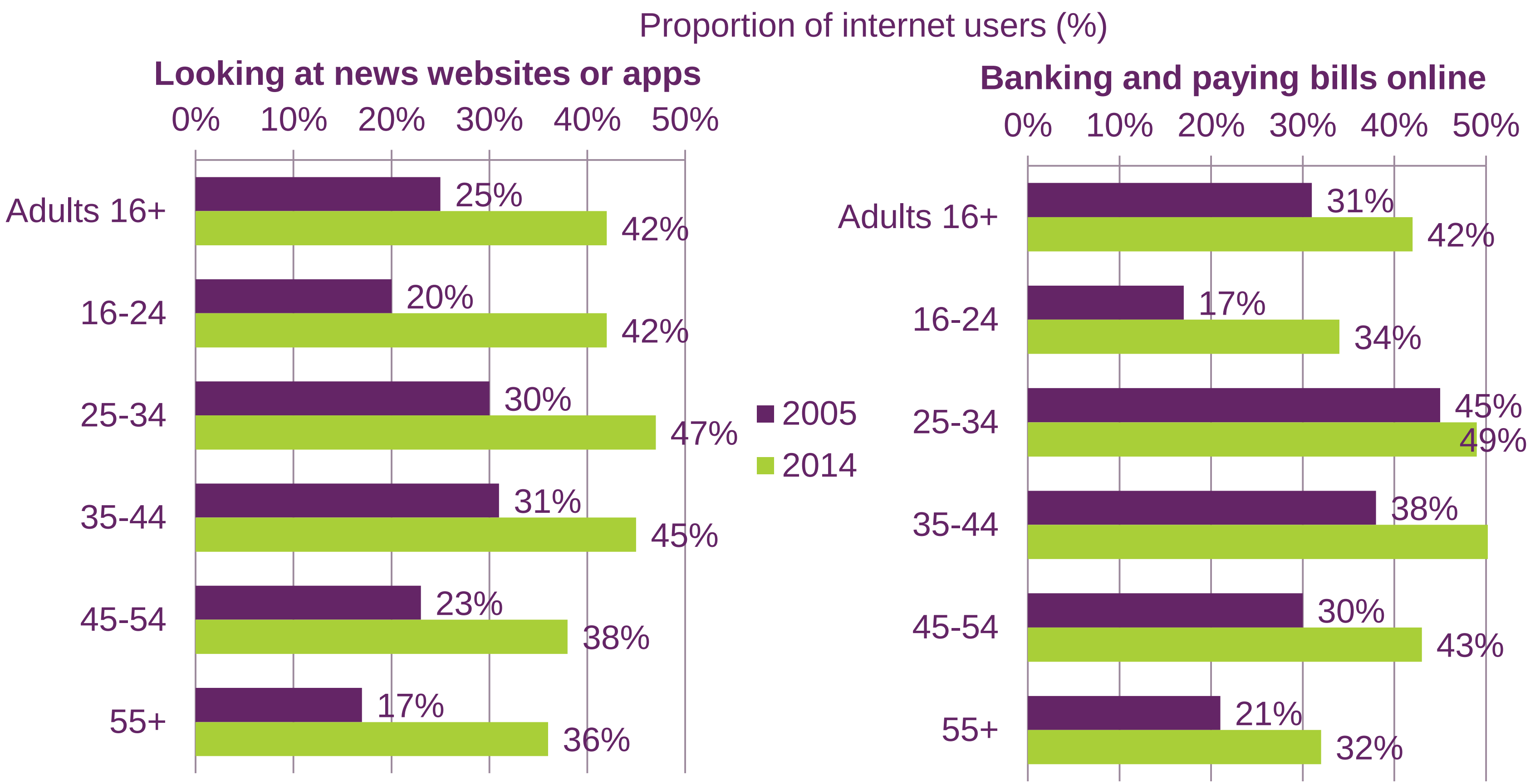
Hours spent online in a typical week, by location: 2005-14



Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All adults who go online in any location on any device (1609 in 2014)
IN6A/IN6B/IN6C: How many HOURS in a typical WEEK would you say you go online at <LOCATION>?

Figure 1.97

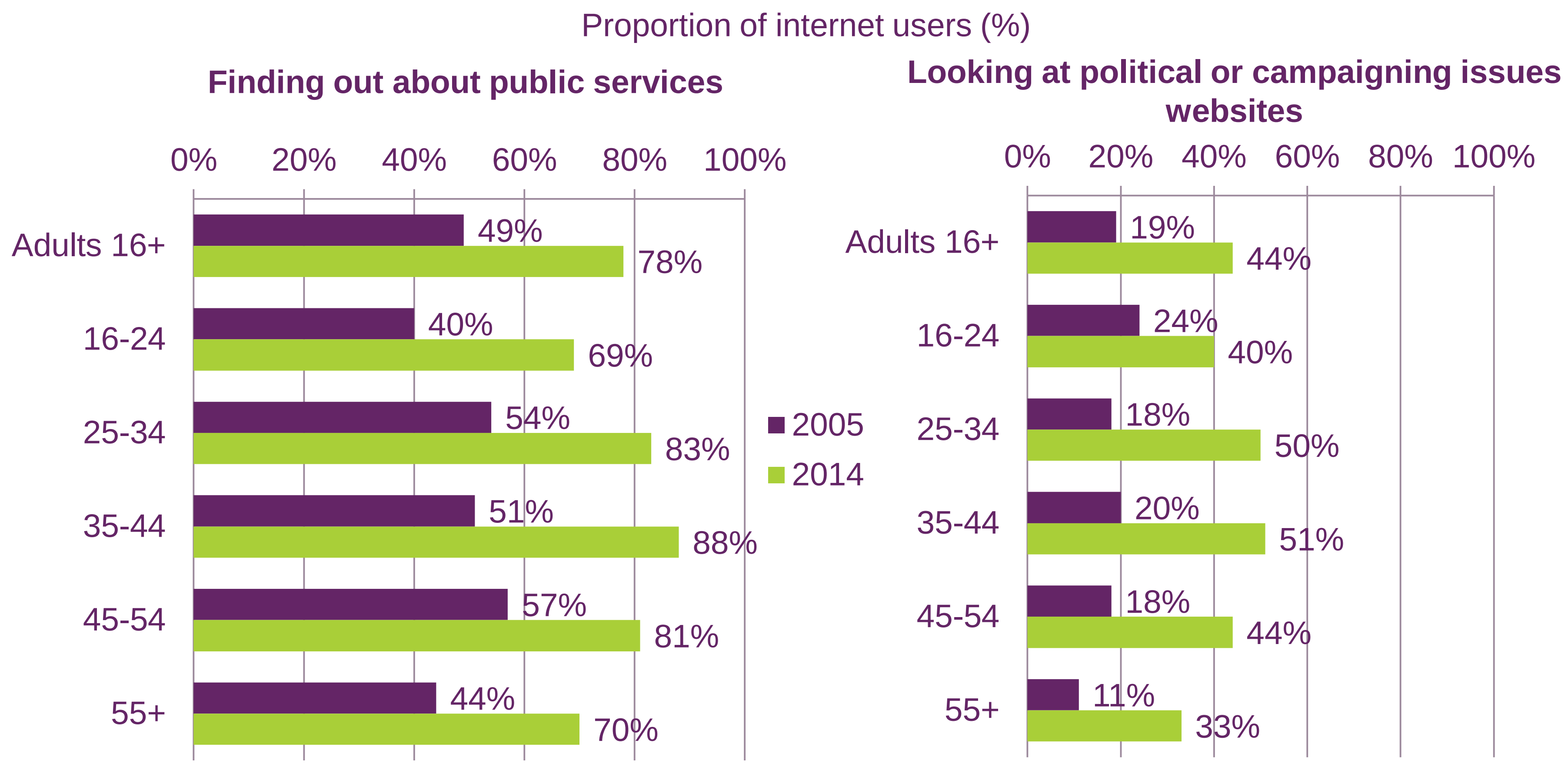
Weekly internet activities: 2005 vs. 2014



Source: Ofcom research, Adults Media Literacy Tracker
Base: All adults who go online in any location on any device (1609 in 2014)
IN15L: How often do you use the internet to <activity>. Answer – Daily, Weekly or less often

Figure 1.98

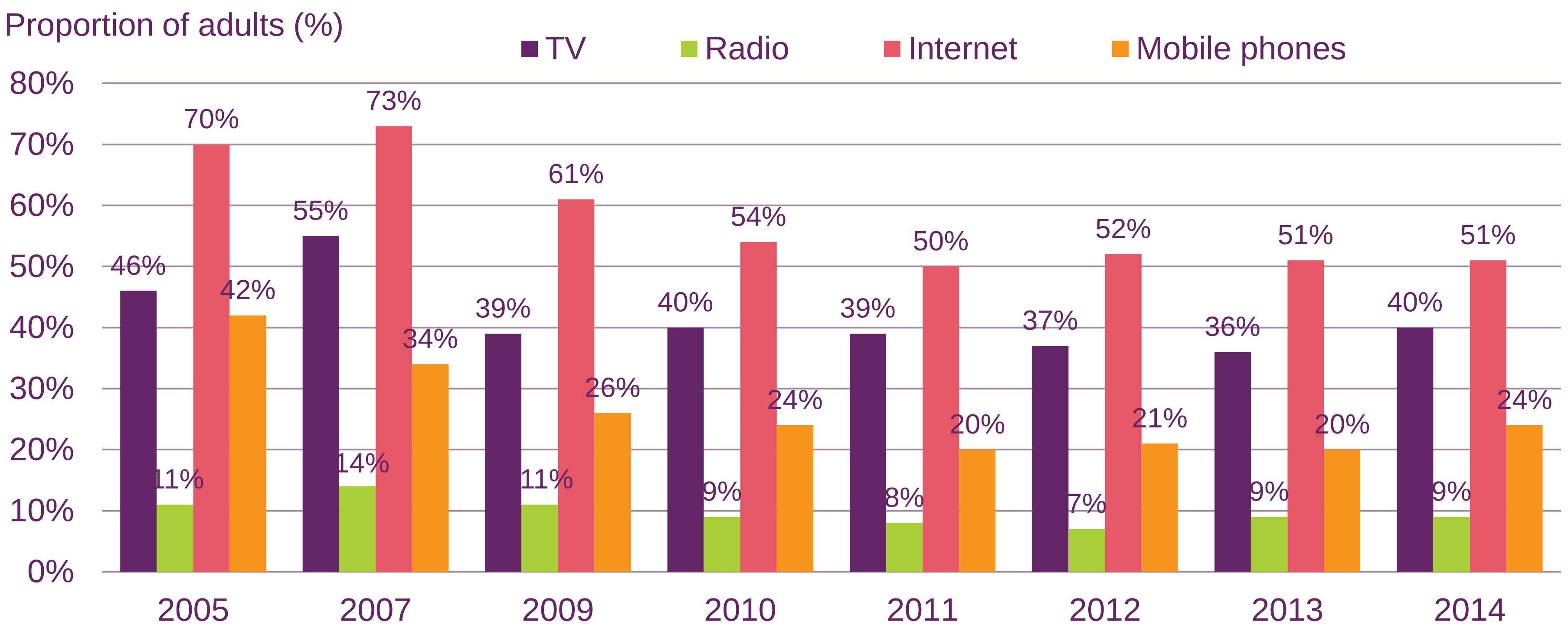
Use of the internet for public/civic activities: 2005 vs. 2014



Source: Ofcom research, Adults Media Literacy Tracker
Base: All adults who go online in any location on any device (1609 in 2014)
IN15L: How often do you use the internet to <activity>. Answer – Daily, Weekly or less often

Figure 1.99

Proportion of adults who have any concerns about media: 2005-14



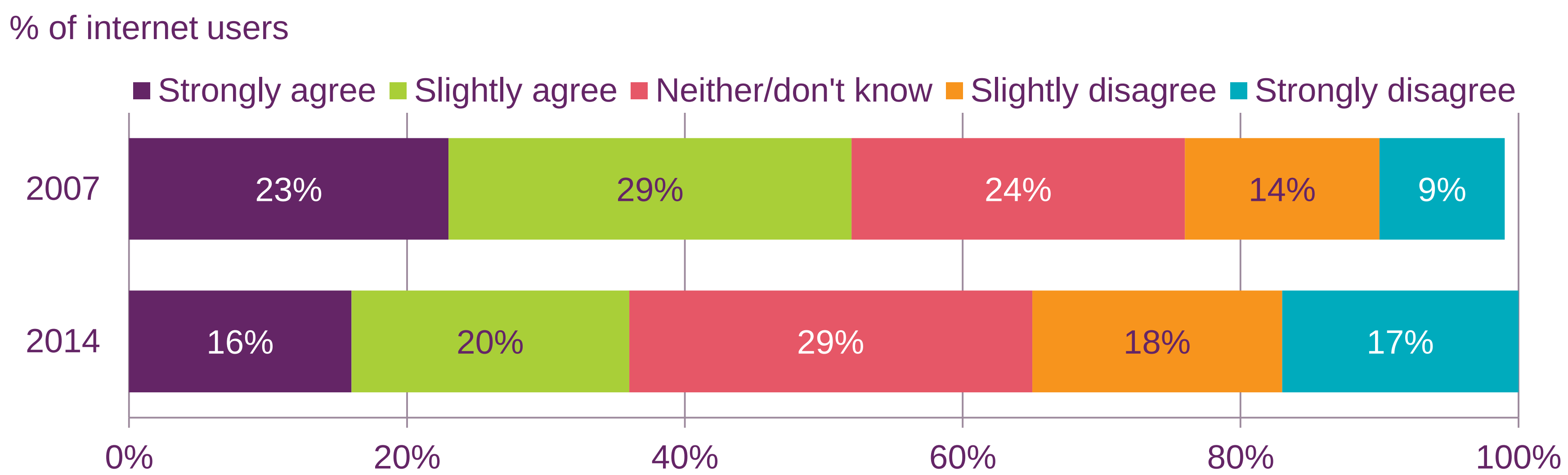
Source: Ofcom research, Adults Media Literacy Tracker

Base: Adults aged 16+ who use each platform (variable base).

IN34/ T5/ R3/ G3/ M3/ IN23 – Can you tell me if you have any concerns about what is on the internet/ TV/ radio. Do you have any concerns about gaming/ mobile phones/ apps? (unprompted responses, multi-coded)

Figure 1.100

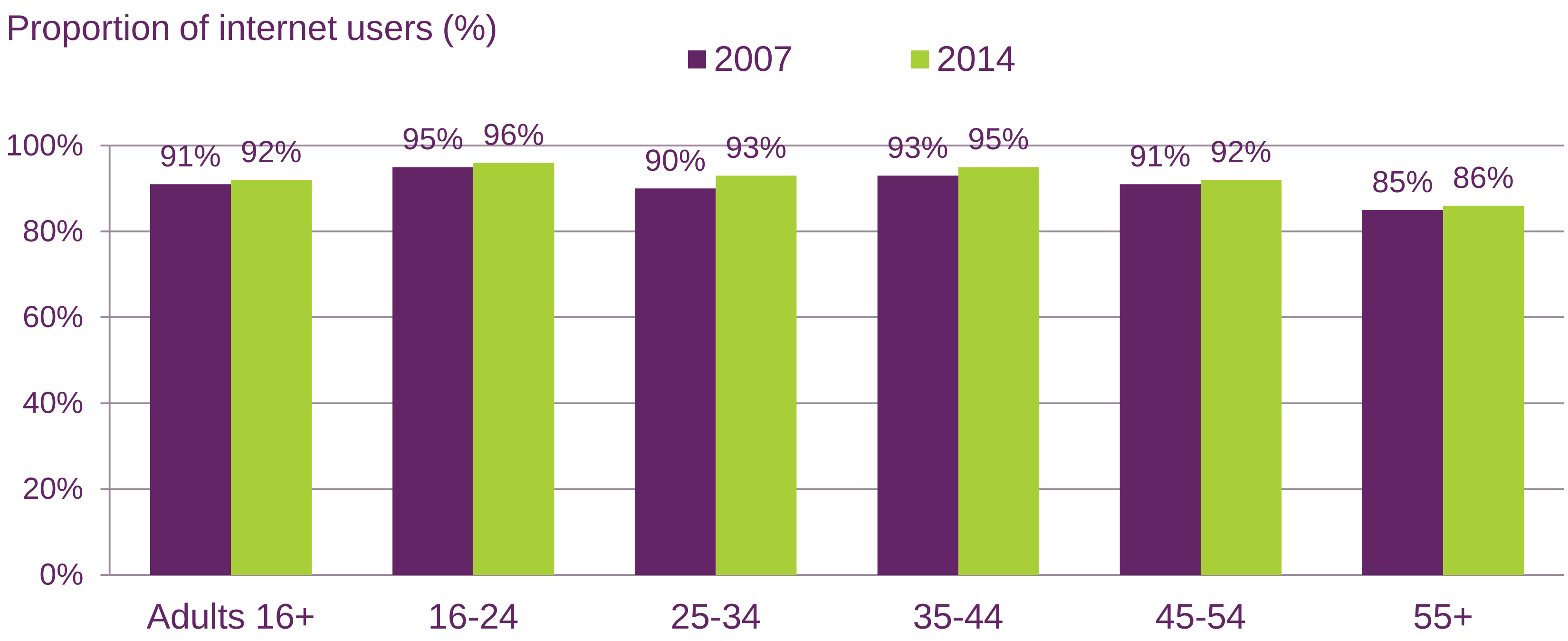
Agreement with statement: “As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded”: 2007 vs. 2014



Source: : Ofcom research, Adults Media Literacy Tracker
Base: All who go online at home or elsewhere on any device (1609)
IN35F: As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded

Figure 1.101

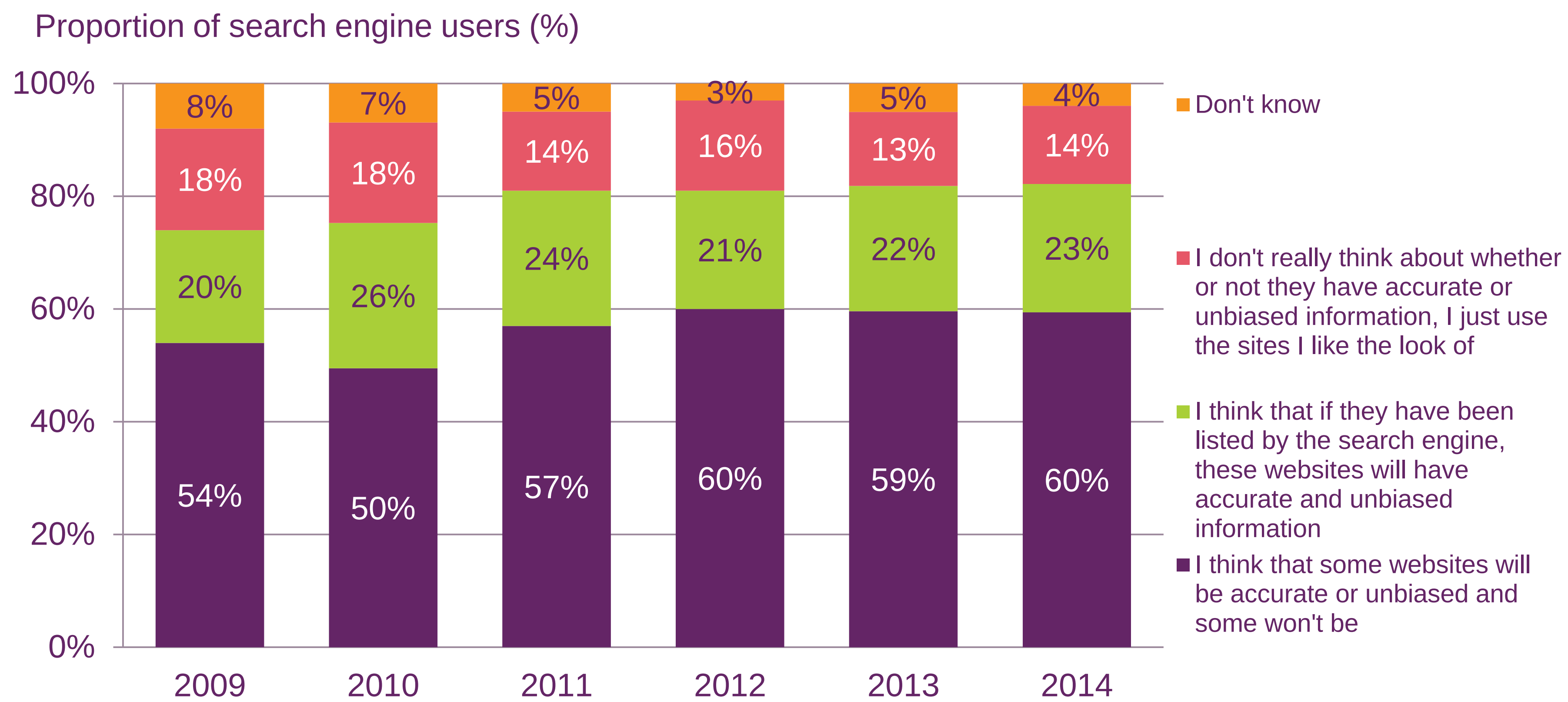
Proportion of adults confident of finding the content or information they want when they go online: 2007 vs. 2014



Source: Ofcom research, Adults Media Literacy Tracker
Base: All internet users (1609 in 2014)
IN13B: How confident are you that you can find the content or information you want when you go online

Figure 1.102

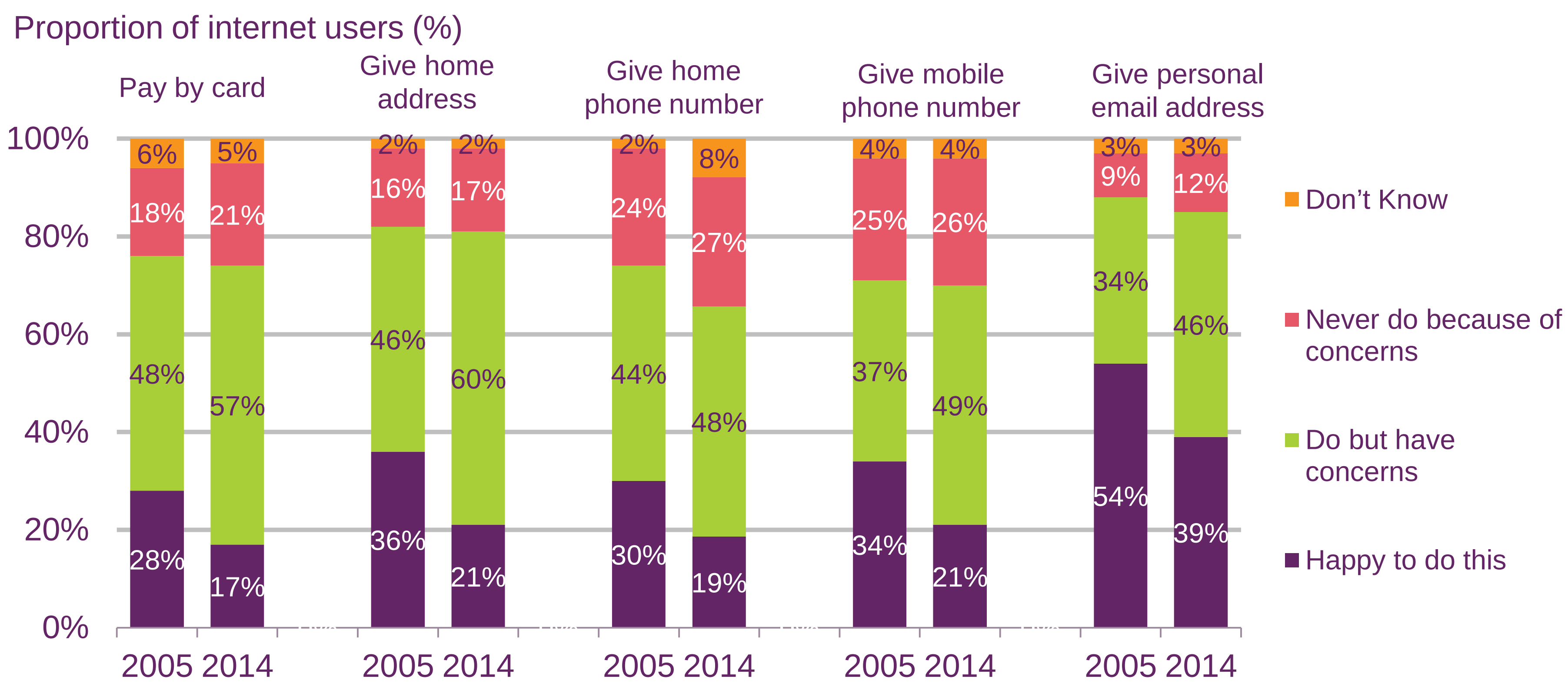
Opinions on the accuracy of search engine results: 2009-14



Source: Ofcom research, Adults Media Literacy Tracker
Base: All adults aged 16+ who ever use search engines (1516 in 2014).
IN45: When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages?

Figure 1.103

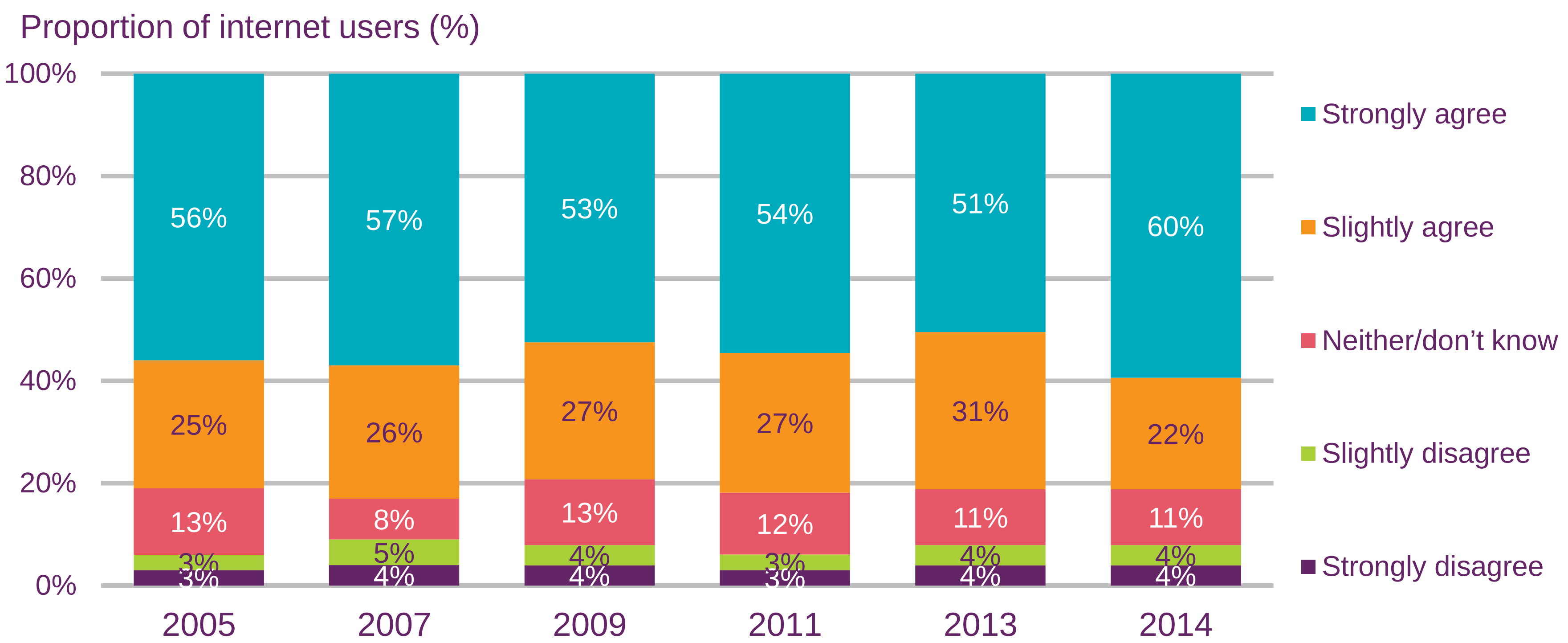
Attitudes to giving out personal details online: 2005 vs. 2014



Source: Ofcom research, Adults Media Literacy Tracker
Base: All who use the internet at home (2005) / All who go online at home or elsewhere on any type of device (1609 in 2014)
IN38: I'd like you to say how you would feel about doing this in terms of any security concerns…. Entering your home address details?
Answer - Have some security concerns about doing this, but would do it

Figure 1.104

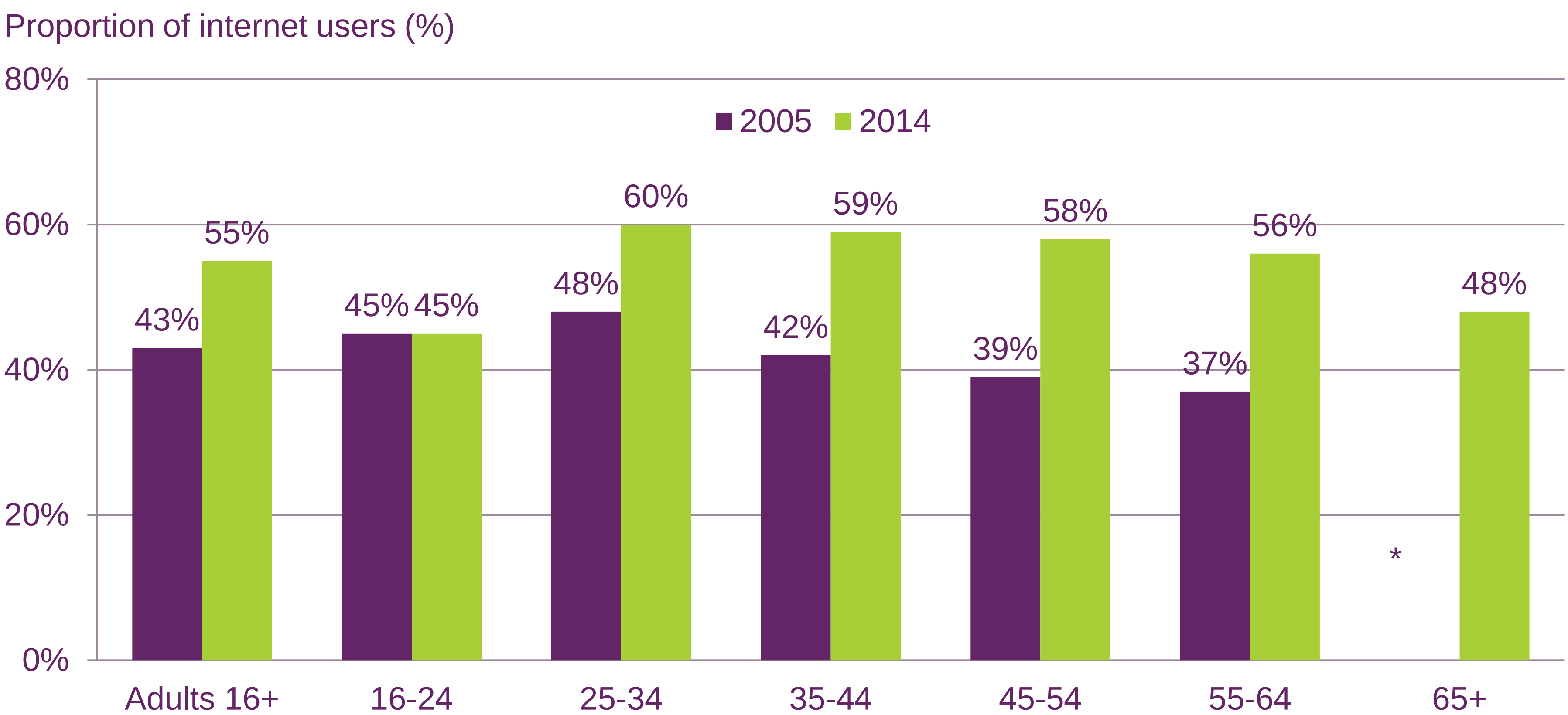
Extent of agreement with the statement: “Internet users must be protected from seeing inappropriate or offensive content”: 2005-14



Source: Ofcom research, Adults Media Literacy Tracker
Base: All who go online at home or elsewhere on any type of device (1609 in 2014)
IN48B Internet users must be protected from seeing inappropriate or offensive content?

Figure 1.105

Use of formal judgements before entering personal details

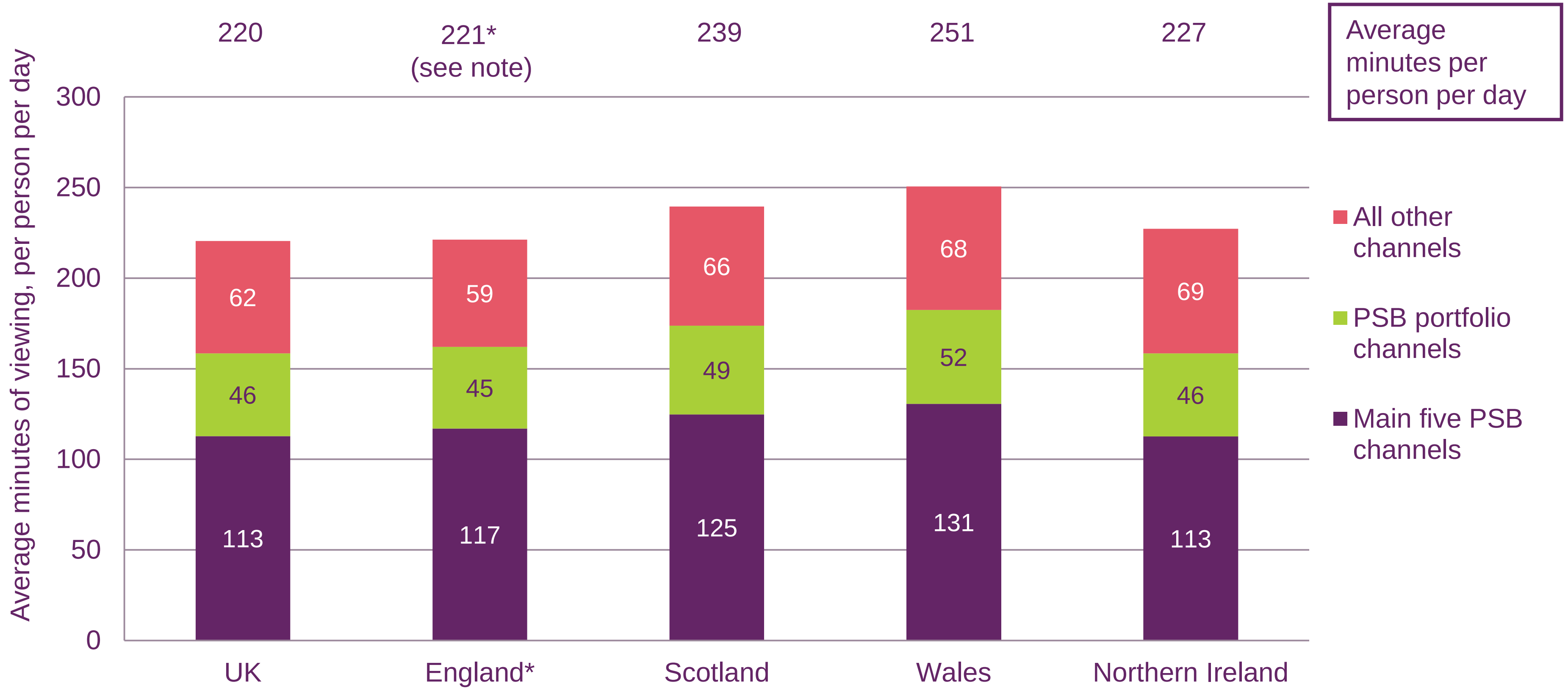


Source: Ofcom research, Adults Media Literacy Tracker
Base: All who use the internet at home (2005) / All who go online at home or elsewhere on any type of device (1609 in 2014)
IN39: Could you tell me whether you would make a judgement about a website before entering these types of details?

Developments in the nations

Figure 1.106

Average minutes of daily TV viewing, by nation: 2014

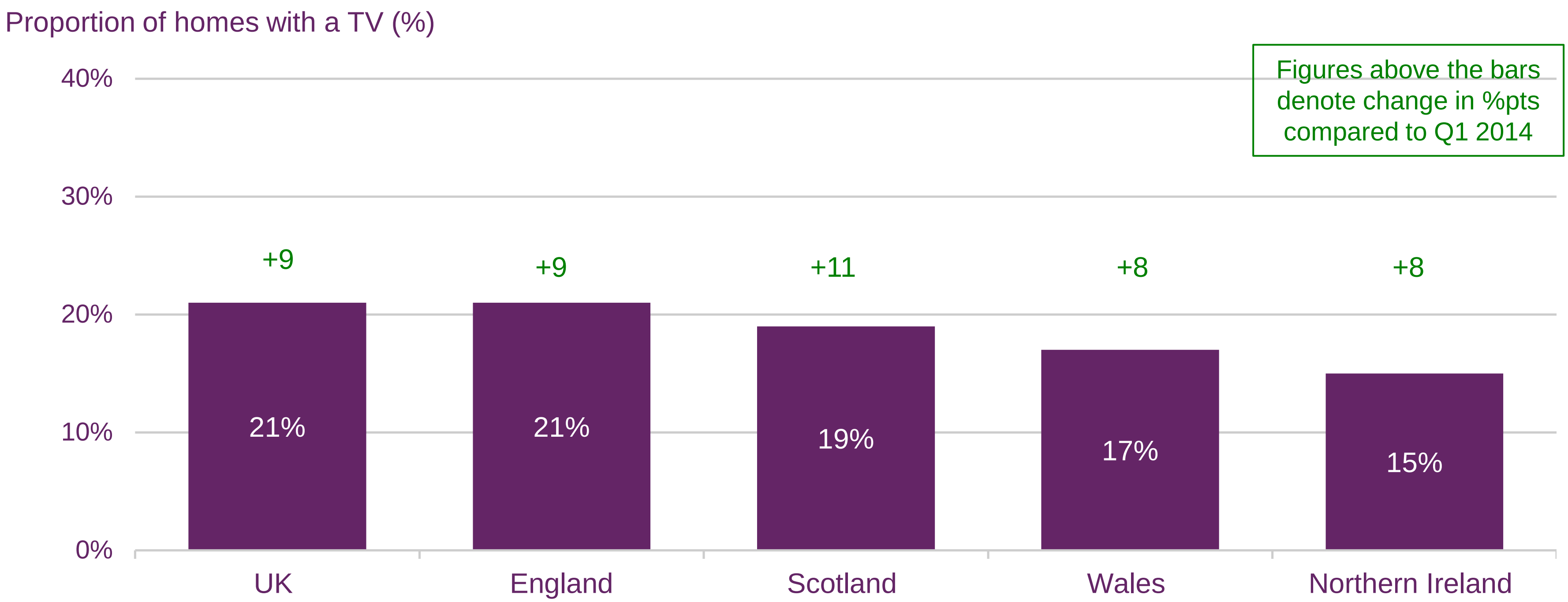


Source: BARB, Individuals (4+). Main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s.

*Note: This figure reflects the average across the English regions with the highest in Border (250) and lowest in West (197) respectively.

Figure 1.107

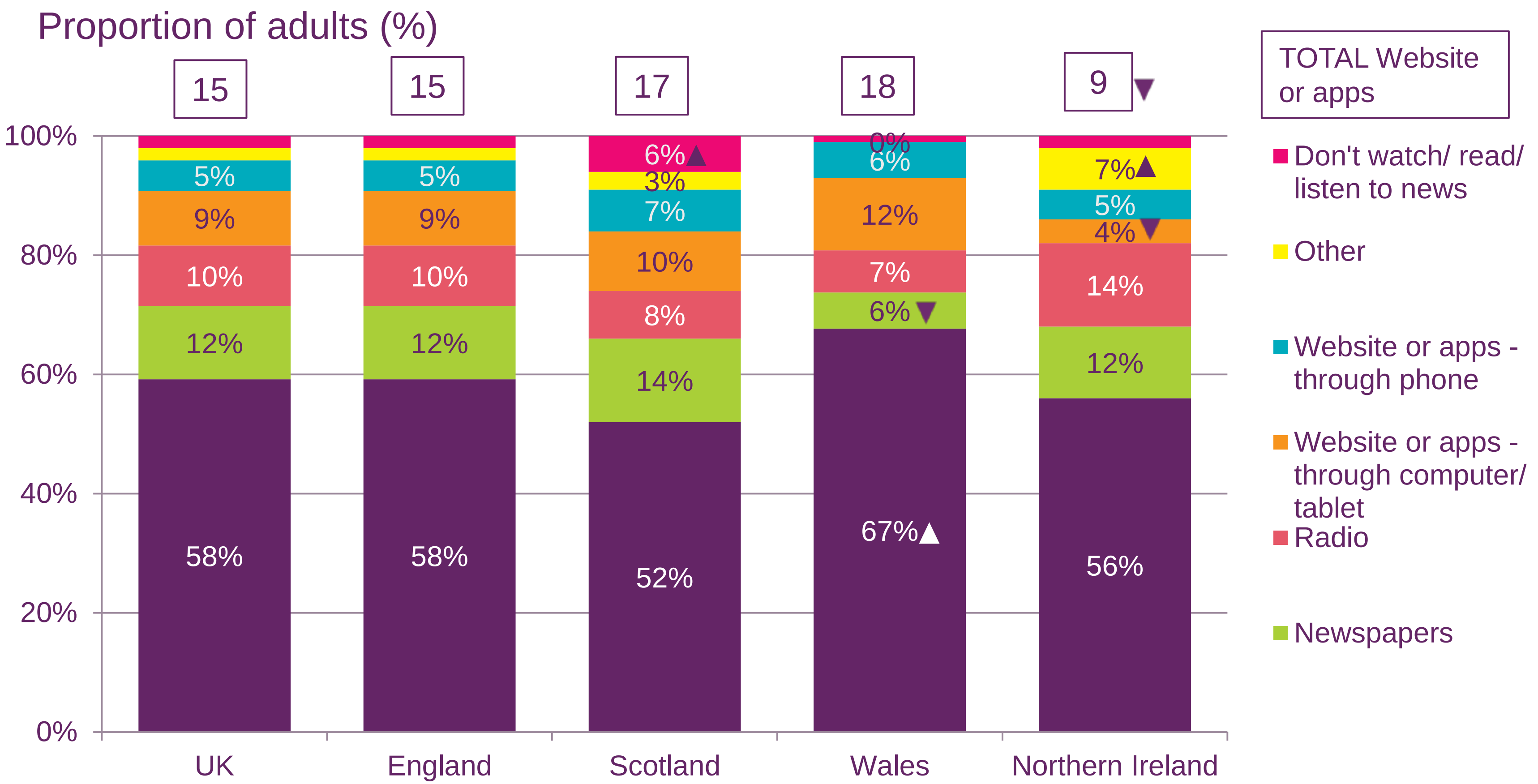
Smart TV take-up across the UK



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 Technology Tracker, Quarter1 2015
Base: All adults aged 16+ with a TV in household (n = 3616 UK, 2197 England, 472 Scotland, 485 Wales, 462 Northern Ireland, 1910 England urban, 287 England rural, 232 London, 249 South East, 241 South West, 241 East Midlands, 242 West Midlands, 242 East of England, 249 Yorkshire & Humber, 245 North East, 256 North West)

Figure 1.108

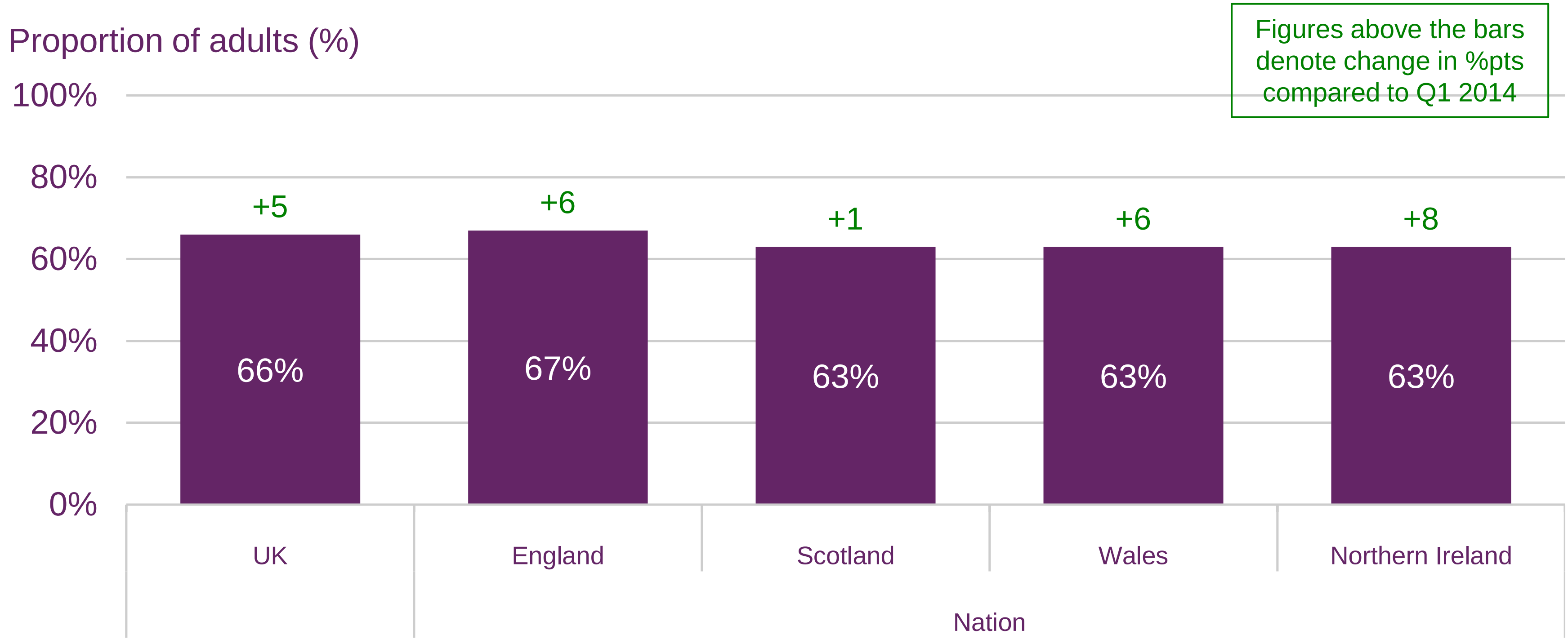
Main media source for UK and world news by nation: 2014



Q62 - Can you tell me which one of these is your ‘main’ source of news about what is going on in the UK and in the world today?
Source: Ofcom Media Tracker 2014.
Base: All (2,074); England (1,577); Scotland (183); Wales (154); Northern Ireland (160). Prompted, single code. Only responses ≥ 3% labelled. Significance testing shows any difference in the main source of news between any nation and all adults.

Figure 1.109

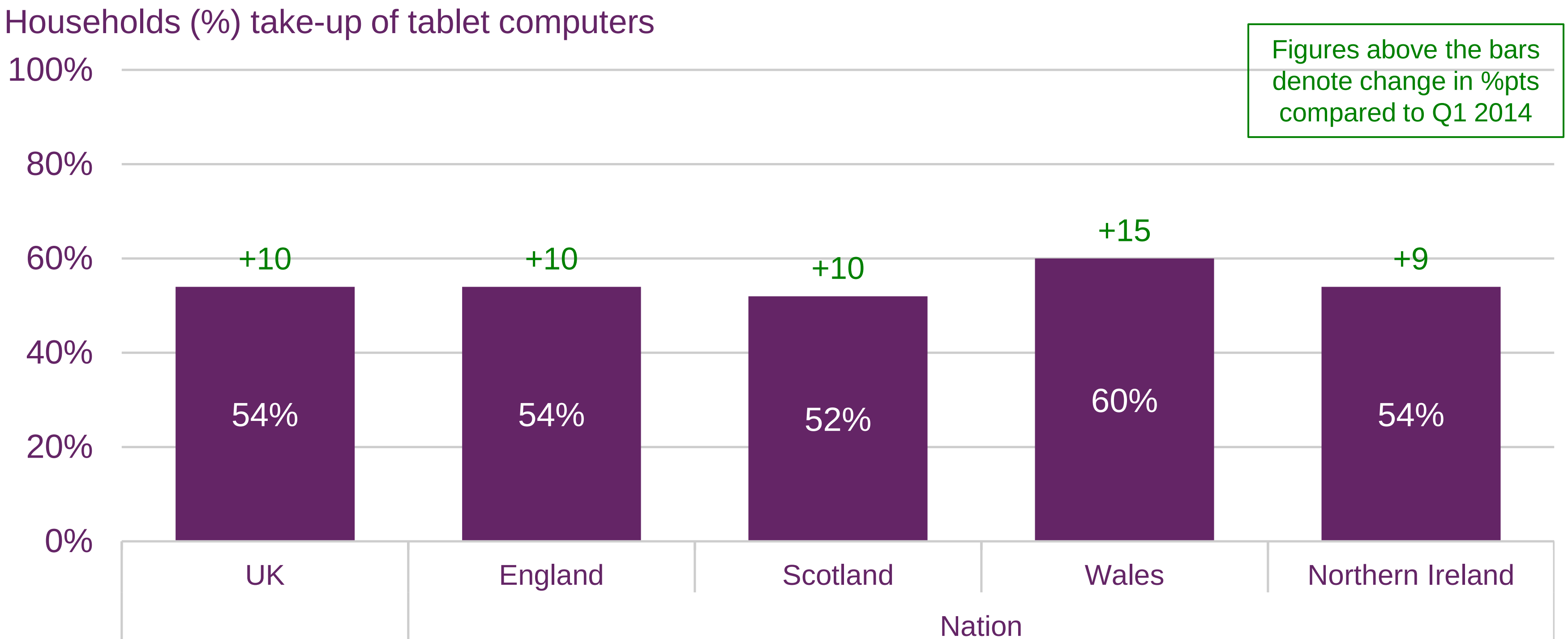
Take-up of smartphones across the UK



QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.
Source: Ofcom Technology Tracker, Quarter 1 2015
Base: All adults aged 16+ (n = 3756 UK, 2264 England, 492 Scotland, 496 Wales, 504 Northern Ireland, 1974 England urban, 290 England rural, 252 London, 258 South East, 247 South West, 245 East Midlands, 249 West Midlands, 252 East of England, 252 Yorkshire & Humber, 251 North East, 258 North West, 1983 England 2011, 2251 England 2012, 2250 England 2013, 2249 England 2014, 2264 England 2015)

Figure 1.110

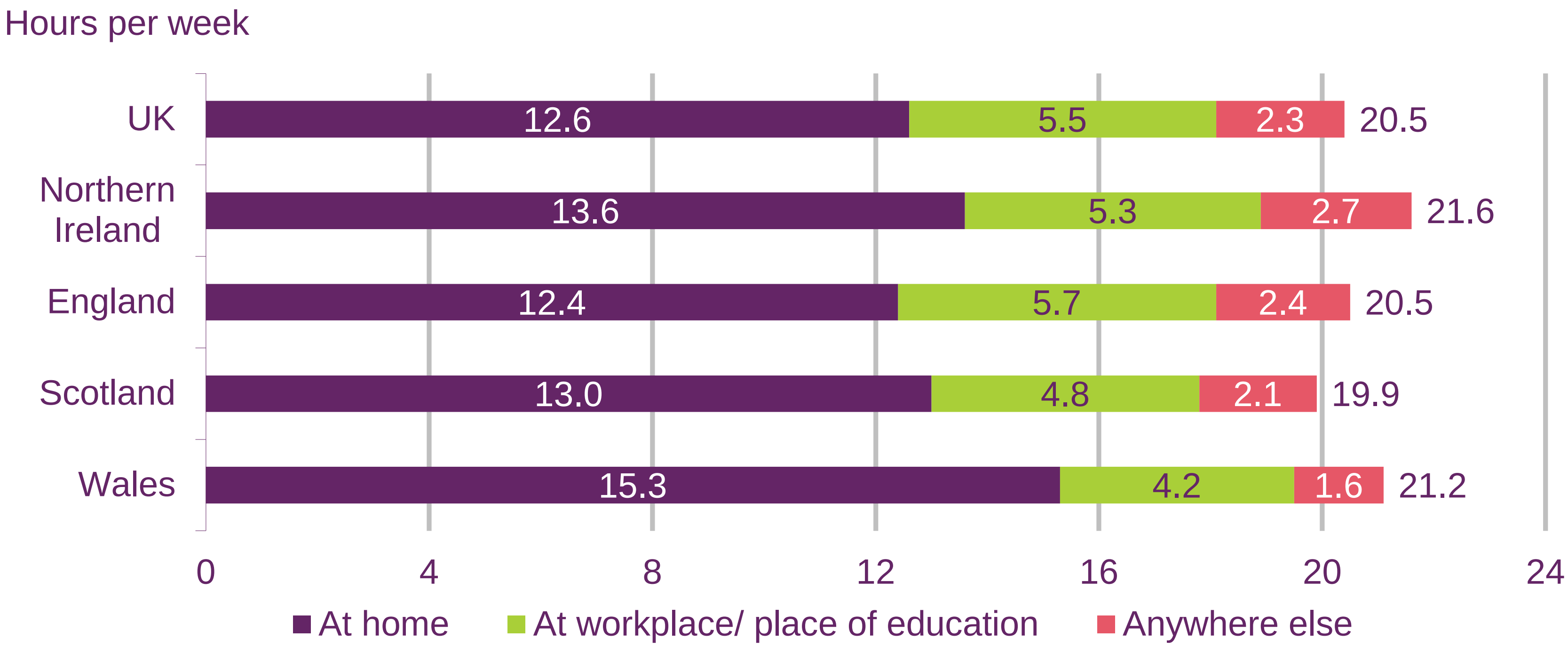
Take-up of tablet computers across UK



QE1. Does your household have a PC, laptop, netbook or tablet computer?
Source: Ofcom Technology Tracker, Quarter1 2015
Base: All adults aged 16+ (n = 3756 UK, 2264 England, 492 Scotland, 496 Wales, 504 Northern Ireland, 1974 England urban, 290 England rural, 252 London, 258 South East, 247 South West, 245 East Midlands, 249 West Midlands, 252 East of England, 252 Yorkshire & Humber, 251 North East, 258 North West, 1983 England 2011, 2251 England 2012, 2250 England 2013, 2249 England 2014, 2264 England 2015)

Figure 1.111

Claimed time spent on the internet in a typical week



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland). Significance testing shows any difference between any nation and the UK.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

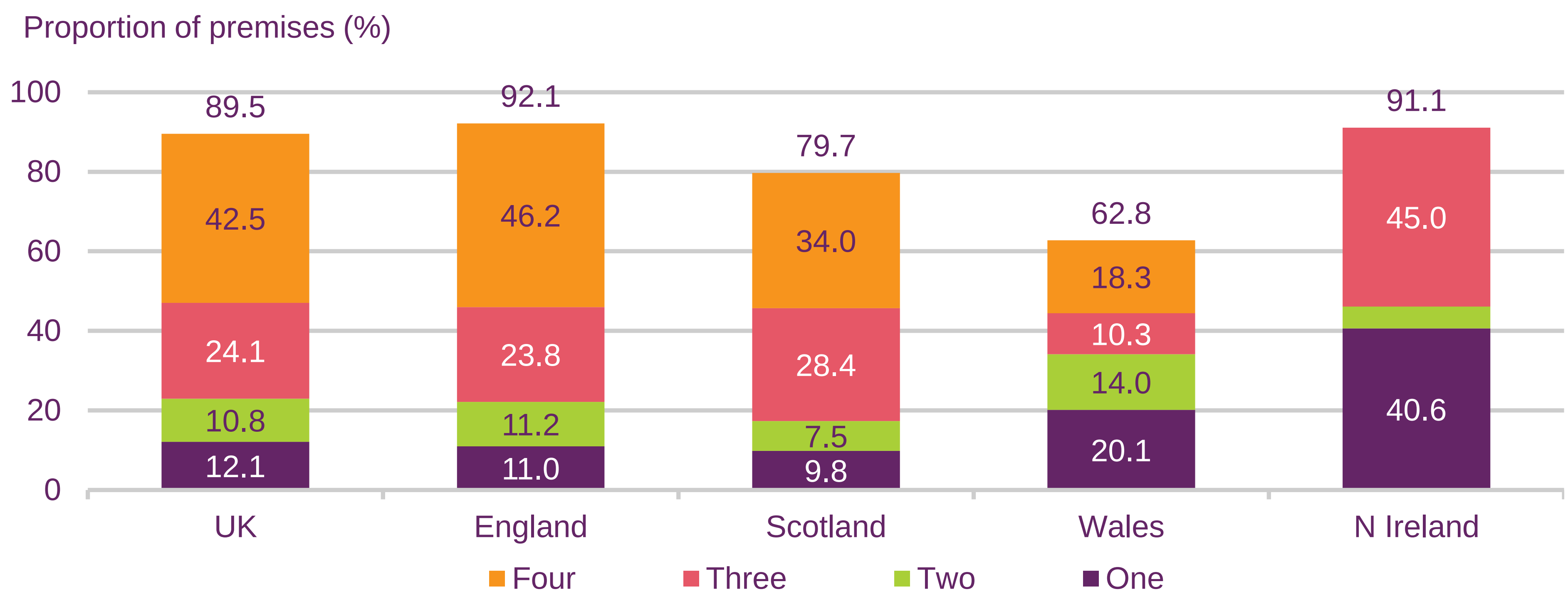
Figure 1.112

Proportion of premises able to receive superfast broadband services

Source: Ofcom / Openreach / Virgin Media / Kcom, June 2015 data

Figure 1.113

4G mobile premises coverage, by number of operators



Source: Ofcom / operators, May 2015 data
Note: Coverage is based on 100m square pixels covering the UK

Figure 1.114

Average weekly reach and listening hours: 2014

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	21.5 hours	19.9 hours	22.4 hours	21.6 hours	21.4 hours
Reach	89.4%	86.9%	94.5%	88.9%	89.5%

Source: RAJAR, All adults (15+), year ended Q4 2014. 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.

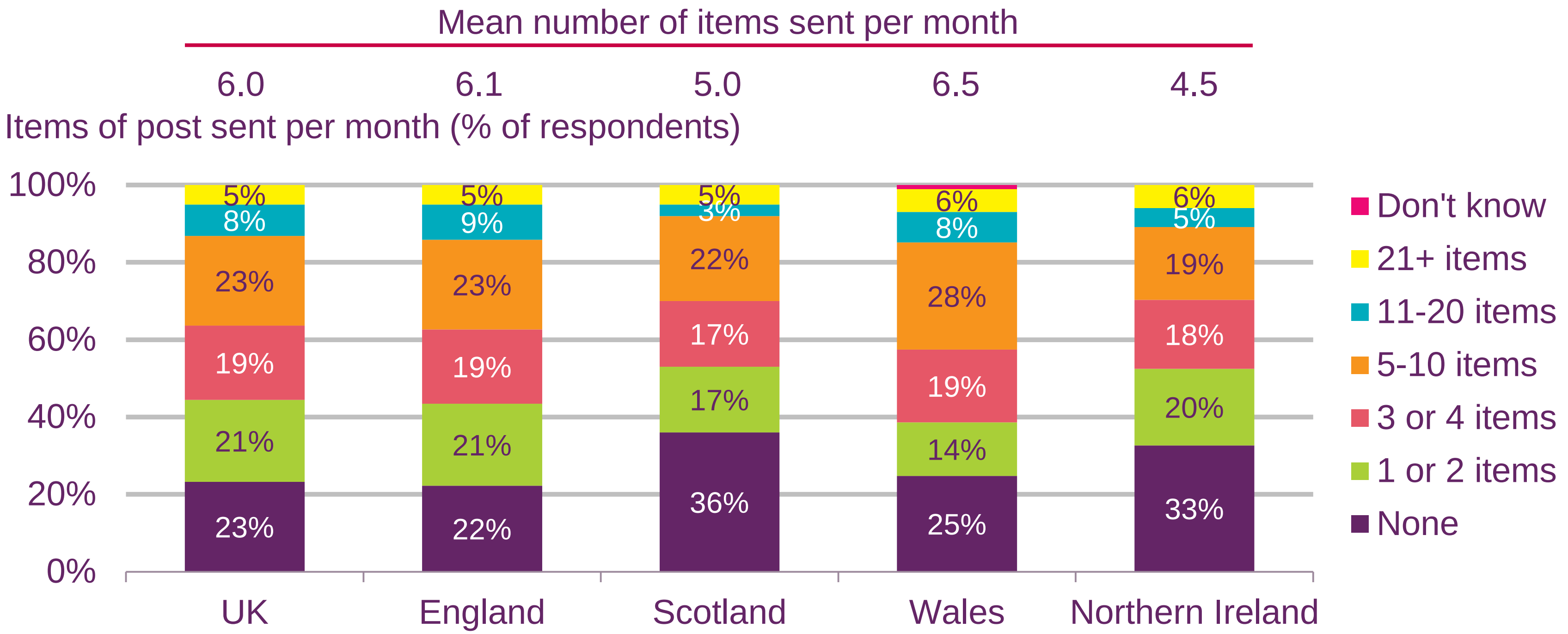
Figure 1.115

Ownership of DAB digital radios: Q1 2015

QP9. How many DAB sets do you have in your household?
Source: Ofcom Technology Tracker, Wave 1 2015
Base: Adults aged 16+ who listen to radio (n = 2934 UK, 407 Northern Ireland, 1735 England, 386 Scotland, 406 Wales, 193 Northern Ireland urban, 214 Northern Ireland rural, 653 Northern Ireland 2010, 428 Northern Ireland 2011, 404 Northern Ireland 2012, 405 Northern Ireland 2013, 404 Northern Ireland 2014, 407 Northern Ireland 2015)
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

Figure 1.116

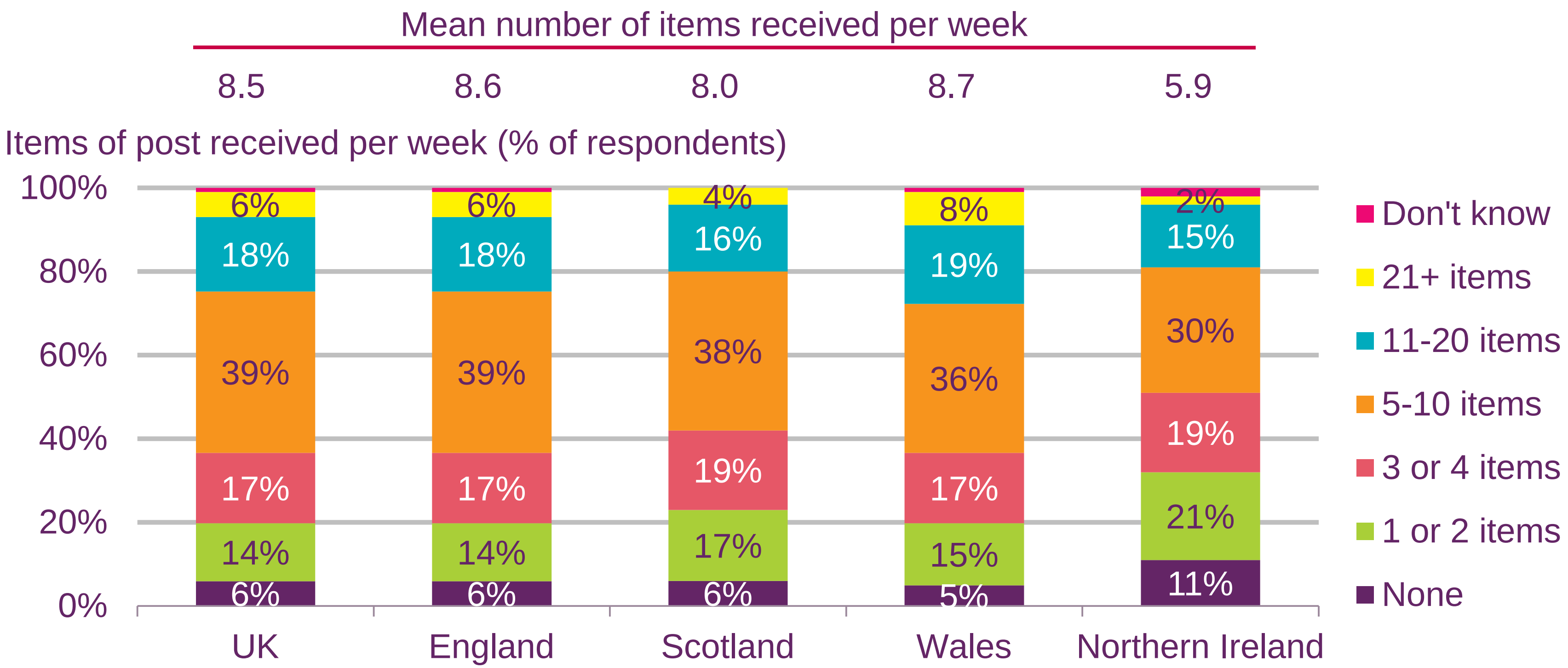
Approximate number of items of post sent each month (residential)



Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015
Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?

Figure 1.117

Approximate number of items of post received in the past week

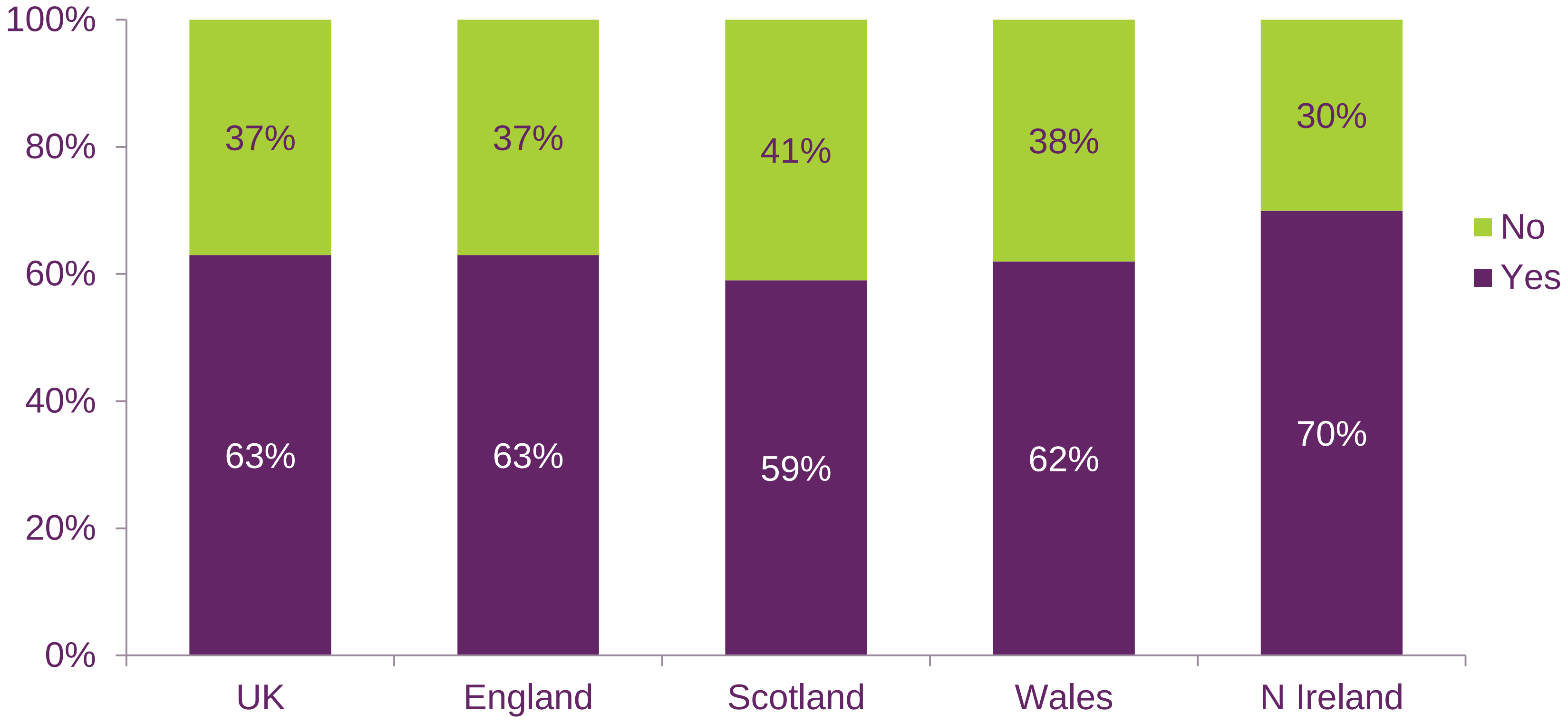


Source: Ofcom Residential Postal Tracker, Q2 2014 - Q1 2015
Base: All respondents (n = 3557 adults 16+, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland) QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

Figure 1.118

Switched some mail to other communication methods over last twelve months

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015
Base: All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 N Ireland)
QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

Background to the Developments in viewing beyond traditional television consumer research

For each of the following activities I read out can you say whether you are doing this more, the same amount or less now compared to a year ago? If you have never done the activity at all, please just tell me. **INTERVIEWER: READ OUT EACH STATEMENT INDIVIDUALLY. SINGLE CODE FOR EACH STATEMENT**

Screen
- **Using a TV set** to watch any programmes/films/clips i.e. watching any programmes/films/clips using any service (e.g. Freeview, Sky, Netflix, BBC iplayer, via a games console etc)
- Using **other screens** to watch any programmes/films/clips e.g. home computers, tablets, smartphones (rather than the TV set)

Location
- Watching any TV, clip, programme when **in your own home** (watching could be on any screen e.g. TV, home computers, tablets, smartphones)
- Watching any TV, clip, programme when **out and about** (watching could be on any screen e.g. TVs, computers, tablets, smartphones)

Linear or other
- Watching TV programmes **as they are broadcast** on TV (e.g. watching EastEnders when it is shown on BBC1 at 7.30pm or watching Game of Thrones at 9pm on Sky Atlantic when it is broadcast)
- Watching TV that you have **personally recorded**, i.e. after recording it onto a set-top box, or PVR
- Watching any **'catch-up' or on-demand TV** where you watch programmes/films that have **been shown on TV recently** (via services like BBC iplayer, itv player, 4OD, SkyGo, Virgin Catch–up etc).
- Watching programmes/films through **on-demand services that you pay a monthly subscription for** like Netflix, Amazon Prime, Now TV etc
- **Paying to watch individual programmes/films** e.g. films through Sky's Box Office service or 'Pay per movie' with Virgin Movies

PSB
- Watching **BBC, ITV/STV/UTV, Channel 4 or Five programmes** in particular (through any channel, any screen and at any time)

Content
- Watching **short clips e**.g. like those found on Youtube, or linked on social media like Facebook
- Watching **series or boxsets** in any way, e.g. on TV, tablets, DVDs, Netflix etc
- Watching **films** (though any service, e.g. Netflix, Now TV, DVDs on either your TV set, computers or smartphones)

International
- Watching **international channels** via satellite services from other countries e.g. Hotbird, Turksat, Hellas Sat), Hispasat, Canal+, Cyfra.
- Watching programmes/films through **international online video services** from other countries, e.g. RTÉ Player, Hulu, My TF1, nc+

Other activities
- Watching **DVDs**
- Going to the **cinema** to watch films
- **Playing games** on a console, computer, tablet or smartphone etc
- Using **social media** e.g. Facebook, etc
- **Going out and socialising**