CMR 2015: Market in context
Key Market Trends
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

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

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 to multi-dwelling units where it 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

Proportion of individuals (%)

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

Proportion of households / adults (%)

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.

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Figure: 1.7

Take-up of superfast broadband services

Connections (millions) | As a proportion of all connections (%)
--- | ---
2009 | 0.2 | 0.2
2010 | 0.9 | 0.2
2011 | 5.0 | 1.0
2012 | 14.3 | 3.1
2013 | 23.2 | 5.3
2014 | 30.0 | 7.1

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 (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>Laptop</th>
<th>Desktop</th>
<th>Smartphone</th>
<th>Tablet</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Of those who personally use a tablet</td>
<td>19</td>
<td>9</td>
<td>32</td>
<td>38</td>
<td></td>
</tr>
<tr>
<td>Of those with a smartphone and who personally use a tablet</td>
<td>18</td>
<td>8</td>
<td>37</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Of those with a desktop and laptop in the household, and who personally use a smartphone and tablet</td>
<td>20</td>
<td>16</td>
<td>31</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Of those with a smartphone</td>
<td>26</td>
<td>9</td>
<td>42</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Of those with a laptop</td>
<td>40</td>
<td>9</td>
<td>31</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>All internet users</td>
<td>30</td>
<td>14</td>
<td>33</td>
<td>19</td>
<td></td>
</tr>
</tbody>
</table>

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

Proportion of internet users (%)

2013 2014 2015

Smartphone 15% 23% 33%
Laptop 46% 40% 30%
Tablet 8% 15% 19%
Desktop 28% 20% 14%
Other 3% 2% 3%

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
A2 – Which one of these things you use almost every day would you miss the most if it got taken away?

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+).
Figure 1.11

Most-missed media device: 2013-2015

Proportion of UK adults (%)

- Radio: 8% (2013), 7% (2014), 5% (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**

- 21+ items: 5%
- 11 to 20 items: 8%
- 5 to 10 items: 23%
- 3 or 4 items: 19%
- 1 or 2 items: 21%
- None: 23%

*Estimated average no. items sent per month: 6.0*

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

- 21+ items: 6%
- 11 to 20 items: 18%
- 5 to 10 items: 39%
- 3 or 4 items: 17%
- 1 or 2 items: 14%
- None: 6%

*Estimated average no. items received per week: 8.5*

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
Figure 1.13
Average time per day spent using communications services: 2014

Average minutes per day

<table>
<thead>
<tr>
<th>Service</th>
<th>Minutes per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>239</td>
</tr>
<tr>
<td>Radio</td>
<td>183</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>87</td>
</tr>
<tr>
<td>Internet on PC/laptop</td>
<td>65</td>
</tr>
<tr>
<td>Fixed phone</td>
<td>19</td>
</tr>
</tbody>
</table>

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

Proportion of households

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

Proportion of users of service (%)

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

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

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

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

Average minutes per day

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).
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

**Total hours/individual per year**

<table>
<thead>
<tr>
<th>Year</th>
<th>Education</th>
<th>Party Political Broadcast</th>
<th>Nations &amp; Regions News</th>
<th>Weather</th>
<th>Religion</th>
<th>Arts</th>
<th>Music</th>
<th>Comedy</th>
<th>Current Affairs</th>
<th>UK Soaps</th>
<th>Drama: Other</th>
<th>Children’s</th>
<th>Other</th>
<th>UK Drama</th>
<th>Leisure Interests</th>
<th>News</th>
<th>Films</th>
<th>Sport</th>
<th>Documentaries</th>
<th>Documentaries</th>
<th>Entertainment</th>
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</thead>
<tbody>
<tr>
<td>2010</td>
<td>49</td>
<td>66</td>
<td>72</td>
<td>71</td>
<td>90</td>
<td>99</td>
<td>106</td>
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<td>151</td>
</tr>
<tr>
<td>2011</td>
<td>50</td>
<td>62</td>
<td>65</td>
<td>73</td>
<td>92</td>
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<td>102</td>
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<td>150</td>
<td>150</td>
<td>150</td>
<td>150</td>
<td>150</td>
</tr>
</tbody>
</table>

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

Average minutes per person

Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
Figure 1.25

Average minutes of viewing by month: 2010-2014

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

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

Average minutes per day

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Q4 2013</th>
<th>Q4 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unmatched (TV in use but content cannot be audio-matched)*</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Time-shifted: viewed 8-28 days after initial broadcast</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Time-shifted: viewed up to 7 days after initial broadcast</td>
<td>29</td>
<td>31</td>
</tr>
<tr>
<td>Traditional TV Viewing (Live)</td>
<td>211</td>
<td>201</td>
</tr>
<tr>
<td>BARB Gold Standard</td>
<td>270</td>
<td>265</td>
</tr>
</tbody>
</table>

Total screen time

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

TV (live – at the time it is broadcast, including red button)
Recorded TV (programmes / films stored on PVR)
On-demand / catch-up TV or films (free) e.g. BBC iPlayer, 4oD, Sky on demand
Download or stream TV or films (paid-for) e.g. Netflix, iTunes, Blinkbox
TV or films on DVD, Blu-ray, VHS video
Short video clips on e.g. YouTube, News sites

Average time spent* hours:mins

<table>
<thead>
<tr>
<th>Age Group</th>
<th>TV</th>
<th>Recorded TV</th>
<th>On-demand</th>
<th>Download or stream</th>
<th>TV or films on DVD, Blu-ray, VHS video</th>
<th>Short video clips</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>65+</td>
<td>82%</td>
<td>12%</td>
<td>3%</td>
<td>2%</td>
<td></td>
<td></td>
<td>4:37</td>
</tr>
<tr>
<td>55-64</td>
<td>80%</td>
<td>13%</td>
<td>3%</td>
<td>2%</td>
<td></td>
<td></td>
<td>4:39</td>
</tr>
<tr>
<td>45-54</td>
<td>69%</td>
<td>20%</td>
<td>4%</td>
<td>2%</td>
<td></td>
<td></td>
<td>4:32</td>
</tr>
<tr>
<td>35-44</td>
<td>67%</td>
<td>17%</td>
<td>7%</td>
<td>3%</td>
<td>5%</td>
<td></td>
<td>3:52</td>
</tr>
<tr>
<td>25-34</td>
<td>61%</td>
<td>18%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>2%</td>
<td>3:53</td>
</tr>
<tr>
<td>16-24</td>
<td>50%</td>
<td>16%</td>
<td>7%</td>
<td>6%</td>
<td>13%</td>
<td>8%</td>
<td>4:14</td>
</tr>
<tr>
<td>Adults aged 16+</td>
<td>69%</td>
<td>16%</td>
<td>5%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>4:18</td>
</tr>
</tbody>
</table>

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

- **11/13**: Netflix available on Virgin Media TiVo STBs
- **02/14**: Amazon rebrands LoveFilm video-on-demand service to Amazon Instant Video
- **11/14**: EE TV launches
- **01/15**: Netflix launches on TalkTalk TV
- **02/15**: Freeview Play announced – PSB backed TV VoD standard
- **03/15**: All 4 launches. Offer includes livestream and on demand, trailers and dedicated short-form content.
- **05/15**: Spotify to include short-form video from partners
- **09/13**: Sony launches 4K ultra HD video download service
- **08/14**: Amazon buys game video streaming service Twitch for $970m
- **10/14**: BBC iPlayer shows made available for 30 days as standard
- **01/15**: Tesco sells blinkbox video to TalkTalk
- **02/15**: Vodafone announces plans to launch cloud-based TV service later in 2015
- **03/15**: Twitter launches Periscope for short-form live video
- **06/15**: BT announces launch of streamed Ultra High definition sports channel in August 2015

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Figure 1.29

Use of VoD services in the past 12 months

Use of VOD services in the past 12 months (%)


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.
Figure 1.31
Reach of selected VoD services over time

Proportion watching VoD services in past 12 months (%)

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

Subscription-VoD service take-up (HH)
Universe (000s)

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

<table>
<thead>
<tr>
<th></th>
<th>Netflix</th>
<th>Amazon Prime /LoveFilm</th>
<th>Now TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2014</td>
<td>2,791</td>
<td>1,217</td>
<td>239</td>
</tr>
<tr>
<td>Q2 2014</td>
<td>3,174</td>
<td>1,102</td>
<td>282</td>
</tr>
<tr>
<td>Q3 2014</td>
<td>3,702</td>
<td>1,021</td>
<td>327</td>
</tr>
<tr>
<td>Q4 2014</td>
<td>3,831</td>
<td>1,072</td>
<td>446</td>
</tr>
<tr>
<td>Q1 2015</td>
<td>4,372</td>
<td>1,155</td>
<td>523</td>
</tr>
</tbody>
</table>

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

Source: BARB Establishment Survey Q1 2014 – Q1 2015
Figure 1.33

Reasons for using Amazon Prime Instant Video / Netflix

- To access back-catalogue of films: Netflix users 63%, Amazon Prime Instant Video users 60%
- To access back-catalogue of TV programmes: Netflix users 47%, Amazon Prime Instant Video users 45%
- To access catalogue of new film releases: Netflix users 42%, Amazon Prime Instant Video users 37%
- To watch at a time that suits: Netflix users 37%, Amazon Prime Instant Video users 35%
- To watch multiple episodes in a row: Netflix users 30%, Amazon Prime Instant Video users 28%
- Cheaper than renting/buying DVDs/Blu-ray discs: Netflix users 28%, Amazon Prime Instant Video users 27%
- To watch programmes missed when initially broadcast: Netflix users 28%, Amazon Prime Instant Video users 27%
- To watch programmes wanted to see again: Netflix users 27%, Amazon Prime Instant Video users 23%
- To watch something different to content on main TV: Netflix users 24%, Amazon Prime Instant Video users 24%
- To watch original series made by provider: Netflix users 24%, Amazon Prime Instant Video users 15%
- Cheaper than pay TV subscription: Netflix users 23%, Amazon Prime Instant Video users 22%
- To watch a specific programme: Netflix users 21%, Amazon Prime Instant Video users 14%
- To watch exclusive content not available elsewhere: Netflix users 20%, Amazon Prime Instant Video users 14%
- To watch content suitable for children: Netflix users 18%, Amazon Prime Instant Video users 14%

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).
Use of VOD services

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**

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

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**

<table>
<thead>
<tr>
<th>Viewing methods</th>
<th>Proportion of UK adults (%)</th>
<th>Net change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Screen</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Via TV set</td>
<td>-7</td>
<td></td>
</tr>
<tr>
<td>Via other screens</td>
<td>+13</td>
<td></td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In home</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Out of home</td>
<td>-4</td>
<td></td>
</tr>
<tr>
<td><strong>Linear or other</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At time of broadcast</td>
<td>-19</td>
<td></td>
</tr>
<tr>
<td>Personally recorded</td>
<td>+13</td>
<td></td>
</tr>
<tr>
<td>Catch-up/on-demand</td>
<td>+26</td>
<td></td>
</tr>
<tr>
<td>Subscription on demand e.g. Netflix</td>
<td>+8</td>
<td></td>
</tr>
<tr>
<td>Pay-per-view</td>
<td>-3</td>
<td></td>
</tr>
<tr>
<td><strong>Content/activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSB</td>
<td>-6</td>
<td></td>
</tr>
<tr>
<td>BBC/ITV/C4/Five programmes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content types</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Short clips</td>
<td>+10</td>
<td></td>
</tr>
<tr>
<td>Series or boxsets</td>
<td>+7</td>
<td></td>
</tr>
<tr>
<td>Films</td>
<td>+5</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td>-3</td>
<td></td>
</tr>
<tr>
<td>International satellite</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>International online</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td><strong>Other activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DVDs</td>
<td>-29</td>
<td></td>
</tr>
<tr>
<td>Cinema</td>
<td>-26</td>
<td></td>
</tr>
<tr>
<td>Games on computers/phones etc</td>
<td>-3</td>
<td></td>
</tr>
<tr>
<td>Social media</td>
<td>+13</td>
<td></td>
</tr>
<tr>
<td>Going out/socialising</td>
<td>-8</td>
<td></td>
</tr>
</tbody>
</table>

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 ago?
Changes in viewing ‘at time of broadcast’

Figure 1.40

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

<table>
<thead>
<tr>
<th>Screen</th>
<th>Doing less</th>
<th>Doing more</th>
<th>Net change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Via TV set</td>
<td>39%</td>
<td>14%</td>
<td>-25</td>
</tr>
<tr>
<td>Via other screens</td>
<td>11%</td>
<td>38%</td>
<td>+27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>Doing less</th>
<th>Doing more</th>
<th>Net change</th>
</tr>
</thead>
<tbody>
<tr>
<td>In home</td>
<td>28%</td>
<td>17%</td>
<td>-11</td>
</tr>
<tr>
<td>Out of home</td>
<td>18%</td>
<td>12%</td>
<td>-6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Linear \ other</th>
<th>Doing less</th>
<th>Doing more</th>
<th>Net change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personally recorded</td>
<td>18%</td>
<td>38%</td>
<td>+20</td>
</tr>
<tr>
<td>Catch-up/on-demand</td>
<td>11%</td>
<td>53%</td>
<td>+42</td>
</tr>
<tr>
<td>Subscription on demand e.g. Netflix</td>
<td>8%</td>
<td>26%</td>
<td>+18</td>
</tr>
<tr>
<td>Pay-per-view</td>
<td>12%</td>
<td>9%</td>
<td>-3</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Content types</th>
<th>Proportion of UK adults who watch PSB programmes less (%)</th>
<th>Net change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Doing less</strong></td>
<td><strong>Doing more</strong></td>
<td></td>
</tr>
<tr>
<td>Short clips</td>
<td>17%</td>
<td>30%</td>
</tr>
<tr>
<td>Series or box sets</td>
<td>19%</td>
<td>30%</td>
</tr>
<tr>
<td>Films</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td><strong>International</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International satellite</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>International online</td>
<td>9%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Other activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DVDs</td>
<td>52%</td>
<td>9%</td>
</tr>
<tr>
<td>Cinema</td>
<td>42%</td>
<td>11%</td>
</tr>
<tr>
<td>Games on computers/phones etc</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Social media</td>
<td>13%</td>
<td>34%</td>
</tr>
<tr>
<td>Going out/socialising</td>
<td>31%</td>
<td>20%</td>
</tr>
</tbody>
</table>

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

Proportion of smartphone owners (%)

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

Proportion of adults (%)

<table>
<thead>
<tr>
<th></th>
<th>16+</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV set</td>
<td>37%</td>
<td>28%</td>
<td>32%</td>
<td>30%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>38%</td>
<td>57%</td>
<td>59%</td>
<td>50%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>PC/laptop</td>
<td>25%</td>
<td>40%</td>
<td>31%</td>
<td>14%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Radio</td>
<td>17%</td>
<td>13%</td>
<td>18%</td>
<td>13%</td>
<td>14%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

Proportion of smartphone owners (%)

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 (%)

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 (%)

<table>
<thead>
<tr>
<th>Proportion checking their phone within 5 mins of preparing to sleep</th>
<th>27%</th>
<th>41%</th>
<th>35%</th>
<th>27%</th>
<th>23%</th>
<th>13%</th>
<th>12%</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>80%</td>
<td>8%</td>
<td>3%</td>
<td>3%</td>
<td>7%</td>
<td>10%</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>60%</td>
<td>11%</td>
<td>14%</td>
<td>13%</td>
<td>18%</td>
<td>21%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>40%</td>
<td>17%</td>
<td>24%</td>
<td>16%</td>
<td>19%</td>
<td>21%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>20%</td>
<td>15%</td>
<td>27%</td>
<td>21%</td>
<td>14%</td>
<td>13%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>0%</td>
<td>17%</td>
<td>20%</td>
<td>15%</td>
<td>19%</td>
<td>15%</td>
<td>10%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

Proportion of internet users (%)

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”.

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Figure 1.50
Proportion of time spent on activities on a smartphone in an average day, by age

- **Communications activities**
- **Reading / browsing activities**
- **Listening activities**
- **Games**
- **Watching activities**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total Time (mins)</th>
<th>Offline (mins)</th>
<th>Online (mins)</th>
</tr>
</thead>
<tbody>
<tr>
<td>65+</td>
<td>8</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>16-24</td>
<td>216</td>
<td>83</td>
<td>133</td>
</tr>
<tr>
<td>Adults 16+</td>
<td>81</td>
<td>40</td>
<td>41</td>
</tr>
</tbody>
</table>

Source: Digital Day 7 day diary
Base: All smartphone users
Figure 1.51

Number of smartphone apps downloaded

Proportion of smartphone owners with apps (%)

<table>
<thead>
<tr>
<th>Category</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults 16+</td>
<td>14%</td>
<td>7%</td>
<td>26%</td>
<td>27%</td>
<td>14%</td>
<td>17.2</td>
</tr>
<tr>
<td>16-24</td>
<td>7%</td>
<td>25%</td>
<td>33%</td>
<td>30%</td>
<td>25%</td>
<td>19.0</td>
</tr>
<tr>
<td>55+</td>
<td>25%</td>
<td>30%</td>
<td>23%</td>
<td>9%</td>
<td>3%</td>
<td>13.5</td>
</tr>
<tr>
<td>Male</td>
<td>14%</td>
<td>25%</td>
<td>23%</td>
<td>9%</td>
<td>4%</td>
<td>19.0</td>
</tr>
<tr>
<td>Female</td>
<td>15%</td>
<td>30%</td>
<td>28%</td>
<td>14%</td>
<td>6%</td>
<td>15.3</td>
</tr>
</tbody>
</table>

Mean number of apps


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

Proportion of smartphone owners (%)

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

Proportion of smartphone owners (%)

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

Proportion of smartphone owners(%)
Figure 1.56
Age profiles of smartphone users with and without 4G access

Proportion of smartphone owners (%)

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

Proportion of smartphone owners (%)

- 4G users
- Smartphone owners without 4G access

0% 20% 40% 60% 80% 100%

More than 10 times a day 2-10 times a day At least once a day At least once a week

55% 46% 43% 43% 5% 10% 0% 1%

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

Proportion of smartphone owners (%)

<table>
<thead>
<tr>
<th></th>
<th>WiFi</th>
<th>Mobile internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inside the home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4G users</td>
<td>91%</td>
<td>19%</td>
</tr>
<tr>
<td>Smartphone owners without 4G access</td>
<td>88%</td>
<td>18%</td>
</tr>
<tr>
<td>Outside the home</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>47%</td>
<td>55%</td>
</tr>
<tr>
<td></td>
<td>69%</td>
<td></td>
</tr>
</tbody>
</table>

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
Connected device couldn’t live without

Proportion of internet users (%)

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

Proportion of smartphone owners (%)

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

Proportion of smartphone owners (%)

<table>
<thead>
<tr>
<th></th>
<th>Mean number of apps downloaded</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17.2</td>
</tr>
<tr>
<td></td>
<td>20.1</td>
</tr>
<tr>
<td></td>
<td>14.4</td>
</tr>
</tbody>
</table>

- All those with apps
- 4G users with apps
- Those without 4G access who have apps

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

Proportion who do each activity on a smartphone (%)

- Sending / receiving email: 87% 77%
- Sending / receiving text messages: 76% 73%
- Accessing social networking sites: 71% 65%
- Instant messaging: 63% 50%
- Sending photos/video by text: 49% 36%
- Using Twitter: 38% 28%
- Internet calls (NET video or voice-only): 28% 20%

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

Proportion who do each activity on a smartphone (%)

- Audio-visual activities (NET streaming / downloading TV/film/short clips)
  - 4G users: 57%
  - Smartphone owners without 4G access: 40%

- Audio activities (NET streaming / downloading music/audio)
  - 4G users: 47%
  - Smartphone owners without 4G access: 28%

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
Other online activities carried out using a smartphone

Proportion who do each activity on a smartphone (%)

- General web browsing: 81% (4G users), 73% (smartphone owners without 4G access)
- Downloading apps: 70% (4G users), 58% (smartphone owners without 4G access)
- Using online maps: 66% (4G users), 56% (smartphone owners without 4G access)
- Online banking: 55% (4G users), 55% (smartphone owners without 4G access)
- Making purchases online: 55% (4G users), 55% (smartphone owners without 4G access)
- Uploading photos/video content: 51% (4G users), 37% (smartphone owners without 4G access)
- Using cloud storage: 30% (4G users), 18% (smartphone owners without 4G access)
- Playing games online: 23% (4G users), 18% (smartphone owners without 4G access)

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 (%)

Base: 4G users (n=641)
Q36BB. Compared to 3G, do you do more or less the following activities now that you have access to 4G on your smartphone?
Communication with friends and family
### Level of agreement with positive statements about online communications

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Don’t know</th>
<th>Agreement by age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology has changed the way I communicate</td>
<td>69%</td>
<td></td>
<td>20%</td>
<td>7%</td>
<td>73% 64%</td>
</tr>
<tr>
<td>Being online is invaluable in keeping me up-to-date and informed about current affairs and/or social issues</td>
<td>64%</td>
<td></td>
<td>21%</td>
<td>11%</td>
<td>70% 54%</td>
</tr>
<tr>
<td>Being online is invaluable in keeping me close to/in touch with friends and family</td>
<td>60%</td>
<td></td>
<td>24%</td>
<td>13%</td>
<td>64% 53%</td>
</tr>
<tr>
<td>New communications methods have made life easier</td>
<td>59%</td>
<td></td>
<td>28%</td>
<td>9%</td>
<td>66% 52%</td>
</tr>
<tr>
<td>Being online inspires me to try new things: travel, new restaurants or recipes, new experiences or entertainment</td>
<td>52%</td>
<td></td>
<td>26%</td>
<td>19%</td>
<td>66% 39%</td>
</tr>
</tbody>
</table>

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

- Being online interrupts face-to-face conversations with friends and family: 51% Agree, 23% Disagree, 22% Don't know, 4% Neutral
- I spend too much time online compared to time with my friends and family: 20% Agree, 29% Neutral, 48% Disagree, 3% Don't know

Agreement by age:
- 16-24: 42% Agree, 54% Disagree
- 55+: 32% Agree, 11% Disagree

Q115. Finally, how much do you agree or disagree with the following statements?
Base: Total= 2290
# Methods of communicating with friends and family, all adults 16+

## Source

**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

## Methods used once a week or more often

<table>
<thead>
<tr>
<th>Method</th>
<th>Once a week</th>
<th>Once a month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emails</td>
<td>72%</td>
<td>13%</td>
</tr>
<tr>
<td>Text messaging</td>
<td>76%</td>
<td>8%</td>
</tr>
<tr>
<td>Meeting face to face</td>
<td>67%</td>
<td>14%</td>
</tr>
<tr>
<td>Voice calls</td>
<td>61%</td>
<td>12%</td>
</tr>
<tr>
<td>Social media</td>
<td>54%</td>
<td>8%</td>
</tr>
<tr>
<td>Instant messaging</td>
<td>49%</td>
<td>8%</td>
</tr>
<tr>
<td>VOIP - video/voice</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>Picture messaging</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>General websites/forums</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Post</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Twitter</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Personal blog/blog sites</td>
<td>8%</td>
<td>3%</td>
</tr>
</tbody>
</table>

## Any text based services:
- **Weekly use**: 93%
- **Monthly use**: 95%

## Any voice based services:
- **Weekly use**: 65%
- **Monthly use**: 77%
Methods of communicating with friends and family: Once a week or more often (by age group)

<table>
<thead>
<tr>
<th>Method</th>
<th>12-15</th>
<th>16-24</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal blog/blog sites</td>
<td>7%</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>VOIP - voice</td>
<td>10%</td>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>Tweeting</td>
<td>9%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>General websites/forums</td>
<td>8%</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>VOIP - video</td>
<td>12%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Electronic mail</td>
<td>14%</td>
<td>63%</td>
<td>66%</td>
</tr>
<tr>
<td>Text messaging</td>
<td>17%</td>
<td>78%</td>
<td>83%</td>
</tr>
<tr>
<td>Social media</td>
<td>28%</td>
<td>71%</td>
<td>78%</td>
</tr>
<tr>
<td>Voice calls</td>
<td>39%</td>
<td>54%</td>
<td>62%</td>
</tr>
<tr>
<td>Emails</td>
<td>62%</td>
<td>62%</td>
<td>78%</td>
</tr>
<tr>
<td>Picture messaging</td>
<td>39%</td>
<td>39%</td>
<td>78%</td>
</tr>
</tbody>
</table>


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

Proportion of adults (%)

Meet face to face: 69% (Family members), 64% (Close friends)
Voice calls: 10% (Family members), 6% (Close friends)
Text messaging: 6% (Family members), 11% (Close friends)
Emails: 5% (Family members), 7% (Close friends)

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

Proportion of adults (%)

Meet face to face: 37%
Social media sites and apps e.g. Facebook: 17%
Emails: 14%
Instant Messaging: 8%
Text messaging: 8%

Q52. And which one of these methods do you prefer to ....?
Base: All respondents=2039, 12-15= 461
Figure 1.72

Preferred method of sending birthday greetings and congratulations

Proportion of adults (%) 

- Post (Letters, cards or packages): 38%
- Meet face to face: 20%
- Social media sites and apps e.g. Facebook: 15%
- Text messaging: 7%
- Emails: 7%

Q52. And which one of these methods do you prefer to ....?
Base: All respondents=2039, 12-15= 461
Preferred method of communicating with people not known so well

Proportion of adults (%)

- **Emails**: 41%
- **Social media sites and apps e.g. Facebook**: 22%
- **Meet face to face**: 17%
- **Text messaging**: 17%
- **Instant messaging**: 6%
- **Voice calls**: 5%

**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

Proportion of online adults (%)

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
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

Arrow show 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 (%)

<table>
<thead>
<tr>
<th>Platform</th>
<th>More than 10 times a day</th>
<th>2-10 times a day</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>Less often than once a week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>20%</td>
<td>39%</td>
<td>21%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>11%</td>
<td>24%</td>
<td>22%</td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>Twitter</td>
<td>11%</td>
<td>24%</td>
<td>21%</td>
<td>17%</td>
<td>27%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>15%</td>
<td>19%</td>
<td>20%</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>Instagram</td>
<td>5%</td>
<td>23%</td>
<td>21%</td>
<td>18%</td>
<td>32%</td>
</tr>
<tr>
<td>YouTube</td>
<td>4%</td>
<td>11%</td>
<td>18%</td>
<td>28%</td>
<td>39%</td>
</tr>
<tr>
<td>MySpace</td>
<td>5%</td>
<td>14%</td>
<td>13%</td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>Pinterest</td>
<td>2%3%</td>
<td>9%</td>
<td>24%</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>LinkedIn</td>
<td>2%8%</td>
<td>26%</td>
<td>63%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flickr</td>
<td>3%6%</td>
<td>19%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Proportion of online users aged 12-15 (%)

<table>
<thead>
<tr>
<th>Platform</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>81%</td>
</tr>
<tr>
<td>Facebook</td>
<td>72%</td>
</tr>
<tr>
<td>Instagram</td>
<td>55%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>53%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>48%</td>
</tr>
<tr>
<td>Twitter</td>
<td>37%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>18%</td>
</tr>
<tr>
<td>Vine</td>
<td>18%</td>
</tr>
<tr>
<td>Kik</td>
<td>16%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>15%</td>
</tr>
<tr>
<td>Ask.fm</td>
<td>11%</td>
</tr>
<tr>
<td>Flickr</td>
<td>11%</td>
</tr>
<tr>
<td>Viber</td>
<td>9%</td>
</tr>
<tr>
<td>MySpace</td>
<td>7%</td>
</tr>
<tr>
<td>Reddit</td>
<td>5%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>4%</td>
</tr>
<tr>
<td>Delicious</td>
<td>1%</td>
</tr>
<tr>
<td>StumbleUpon</td>
<td>1%</td>
</tr>
<tr>
<td>Pheed</td>
<td>1%</td>
</tr>
</tbody>
</table>

Use the most (>5%):
- Facebook: 30%
- YouTube: 27%
- Instagram: 17%
- Snapchat: 13%

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?
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

<table>
<thead>
<tr>
<th>Platform</th>
<th>More than 10 times a day</th>
<th>2-10 times a day</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>Less often than once a week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>19%</td>
<td>31%</td>
<td>23%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>YouTube</td>
<td>15%</td>
<td>29%</td>
<td>29%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>Instagram</td>
<td>16%</td>
<td>32%</td>
<td>21%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>24%</td>
<td>24%</td>
<td>22%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>14%</td>
<td>23%</td>
<td>18%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Twitter</td>
<td>9%</td>
<td>21%</td>
<td>24%</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>10%</td>
<td>15%</td>
<td>19%</td>
<td>21%</td>
<td>35%</td>
</tr>
<tr>
<td>Vine</td>
<td>6%</td>
<td>11%</td>
<td>17%</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>Kik</td>
<td>13%</td>
<td>4%</td>
<td>11%</td>
<td>9%</td>
<td>62%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>7%</td>
<td>16%</td>
<td>26%</td>
<td>50%</td>
<td>24%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Type of topics ‘tweeted’ about</th>
<th>Proportion of Twitter account holders (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-tweets</td>
<td>Adults 16+  52%  16-24  40%  55+  55%</td>
</tr>
<tr>
<td>News</td>
<td>Adults 16+  37%  16-24  33%  55+  35%</td>
</tr>
<tr>
<td>Complaints/ frustrations</td>
<td>Adults 16+  31%  16-24  40%  55+  24%</td>
</tr>
<tr>
<td>Daily activities</td>
<td>Adults 16+  35%  16-24  34%  55+  22%</td>
</tr>
<tr>
<td>Friends</td>
<td>Adults 16+  38%  16-24  32%  55+  21%</td>
</tr>
<tr>
<td>Local info</td>
<td>Adults 16+  28%  16-24  22%  55+  18%</td>
</tr>
<tr>
<td>Family</td>
<td>Adults 16+  18%  16-24  15%  55+  13%</td>
</tr>
<tr>
<td>Celebrities</td>
<td>Adults 16+  13%  16-24  10%  55+  7%</td>
</tr>
<tr>
<td>Brands</td>
<td>Adults 16+  8%   16-24  7%   55+  1%</td>
</tr>
<tr>
<td>None of these</td>
<td>Adults 16+  6%   16-24  4%   55+  2%</td>
</tr>
</tbody>
</table>

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

Proportion of Twitter account holders (%)

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

Proportion of internet users (%)

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?
Level of agreement with statements about social media

Proportion of internet users (%)

- I can’t understand why people share personal information with people they don’t know well or at all
  - Agree: 72%
  - Neither agree nor disagree: 19%
  - Disagree: 9%

- People aren’t their real selves on social media
  - Agree: 59%
  - Neither agree nor disagree: 33%
  - Disagree: 8%

- Social media creates pressure to be active/get comments/likes
  - Agree: 50%
  - Neither agree nor disagree: 31%
  - Disagree: 19%

- Social media creates pressure to stay in the loop/keep in touch
  - Agree: 49%
  - Neither agree nor disagree: 33%
  - Disagree: 18%

- I have put things on social media I wish I hadn’t
  - Agree: 19%
  - Neither agree nor disagree: 21%
  - Disagree: 59%

- I am happy to share information online that a wide audience can see
  - Agree: 16%
  - Neither agree nor disagree: 27%
  - Disagree: 57%

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
### Retention and use of music collections

<table>
<thead>
<tr>
<th>Format</th>
<th>% who have ever had</th>
<th>% who still have</th>
<th>% who still listen</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDs</td>
<td>68%</td>
<td>90%</td>
<td>84%</td>
</tr>
<tr>
<td>Stored digital music</td>
<td>47%</td>
<td>96%</td>
<td>93%</td>
</tr>
<tr>
<td>Cassettes</td>
<td>39%</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Vinyl</td>
<td>38%</td>
<td>67%</td>
<td>36%</td>
</tr>
<tr>
<td>Via a streamed service</td>
<td>21%</td>
<td>88%</td>
<td>91%</td>
</tr>
<tr>
<td>Any physical format</td>
<td>70%</td>
<td>90%</td>
<td>84%</td>
</tr>
<tr>
<td>Any digital format</td>
<td>51%</td>
<td>96%</td>
<td>96%</td>
</tr>
</tbody>
</table>

**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 listened to instead of physical formats

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

<table>
<thead>
<tr>
<th>Physical music format owned but no longer listened to that way</th>
<th>Vinyl</th>
<th>Cassette</th>
<th>CD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vinyl</td>
<td>-</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Cassette</td>
<td>9%</td>
<td>-</td>
<td>3%</td>
</tr>
<tr>
<td>CD</td>
<td>76%</td>
<td>80%</td>
<td>-</td>
</tr>
<tr>
<td>Stored digital music</td>
<td>51%</td>
<td>53%</td>
<td>65%</td>
</tr>
<tr>
<td>Streamed music service</td>
<td>17%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Any physical format</td>
<td>77%</td>
<td>81%</td>
<td>8%</td>
</tr>
<tr>
<td>Any digital format</td>
<td>54%</td>
<td>57%</td>
<td>74%</td>
</tr>
</tbody>
</table>

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

- My digital music collection is more flexible: 30%
- I don't have a working CD/record/cassette player: 28%
- I download music or use online streaming services: 18%
- It took up too much space: 13%
- The quality is not as good as on digital formats: 8%
- It is too expensive/difficult to buy new music in...: 3%
- I sold it to make some extra cash: 3%
- Other reason: 22%

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

Agreement with statements about physical formats among those with physical formats

<table>
<thead>
<tr>
<th>Statement</th>
<th>16+</th>
<th>16-24</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like to collect physical copies</td>
<td>33%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>I like to have the artwork/information/booklet that comes with physical formats</td>
<td>33%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>It is easier to lend a physical music format to a friend</td>
<td>14%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Analogue sound quality is better than digital</td>
<td>10%</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Agreement with statements about digital formats among those with digital formats

<table>
<thead>
<tr>
<th>Statement</th>
<th>16+</th>
<th>16-24</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like being able to carry my music collection around with me</td>
<td>50%</td>
<td>30%</td>
<td>58%</td>
</tr>
<tr>
<td>Online music collections are more convenient</td>
<td>55%</td>
<td>34%</td>
<td>49%</td>
</tr>
<tr>
<td>Accessing music online makes it easier to find new/access a wider range of music</td>
<td>41%</td>
<td>27%</td>
<td>49%</td>
</tr>
<tr>
<td>Online music collections are cheaper/better value for money</td>
<td>27%</td>
<td>20%</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Photo Format</th>
<th>16+</th>
<th>16-24</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Framed photos on display</td>
<td>64%</td>
<td>74%</td>
<td>64%</td>
</tr>
<tr>
<td>Digital photos or videos stored on device</td>
<td>63%</td>
<td>75%</td>
<td>63%</td>
</tr>
<tr>
<td>Boxes or albums of printed photos</td>
<td>54%</td>
<td>65%</td>
<td>54%</td>
</tr>
<tr>
<td>Digital photos or videos stored in online storage services</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Analogue video footage</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Digital photos or videos on photo sharing sites</td>
<td>16%</td>
<td>29%</td>
<td>16%</td>
</tr>
<tr>
<td>Photo film not yet developed</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>None of these</td>
<td>14%</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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

% of each age group

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?
## Frequency of taking different types of photo

<table>
<thead>
<tr>
<th>Category</th>
<th>Total ever taking this type of photo</th>
<th>% of all UK adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family and friends</td>
<td>93%</td>
<td>8%</td>
</tr>
<tr>
<td>Selfies</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Pets</td>
<td>36%</td>
<td>22%</td>
</tr>
<tr>
<td>Special events</td>
<td>83%</td>
<td>16%</td>
</tr>
<tr>
<td>Meals/food</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>Tourist attractions</td>
<td>73%</td>
<td>22%</td>
</tr>
</tbody>
</table>

### Question

Q10. When taking photos, how often do you take photos of the following?

- **Family and friends**: 7% once a year or less often, 20% once every few months, 43% at least once a month, 29% at least once a week, 16% every day.
- **Selfies**: 8% once a year or less often, 20% once every few months, 43% at least once a month, 29% at least once a week, 16% every day.
- **Pets**: 4% once a year or less often, 9% once every few months, 22% at least once a month, 6% at least once a week, 6% every day.
- **Special events**: 1% once a year or less often, 9% once every few months, 22% at least once a month, 6% at least once a week, 6% every day.
- **Meals/food**: 1% once a year or less often, 7% once every few months, 6% at least once a month, 6% at least once a week, 6% every day.
- **Tourist attractions**: 5% once a year or less often, 7% once every few months, 15% at least once a month, 6% at least once a week, 6% every day.

**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

% of those who ever take photos

0% 20% 40% 60% 80% 100%

Never
Once a year or less often
Once every few months
At least once a month
At least once a week
Every day

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

I often delete unwanted photos 54%
I use social media to share photos with friends and family 44%
I save/back up important photos 40%
I print important photos 32%
I save/back up all the photos I take 31%
I only print the photos I want to display 26%
I often edit photos using photo editing apps or software 18%
I create online photobooks of my important photos 12%
None of these 8%

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

- I often delete unwanted photos
- I use social media to share photos with friends and family
- I save/back up important photos
- I print important photos
- I save/back up all the photos I take
- I only print the photos I want to display
- I often edit photos using photo editing apps or software
- I create online photobooks of my important photos
- None of these

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

Hours spent online on average each week

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>?

**Looking at news websites or apps**

- **Adults 16+**: 25% (2005), 42% (2014)
- **16-24**: 20% (2005), 42% (2014)
- **25-34**: 30% (2005), 47% (2014)
- **35-44**: 31% (2005), 45% (2014)
- **45-54**: 23% (2005), 38% (2014)
- **55+**: 17% (2005), 36% (2014)

**Banking and paying bills online**

- **Adults 16+**: 31% (2005), 42% (2014)
- **16-24**: 17% (2005), 34% (2014)
- **25-34**: 30% (2005), 45% (2014)
- **35-44**: 38% (2005), 49% (2014)
- **45-54**: 30% (2005), 43% (2014)
- **55+**: 21% (2005), 32% (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


Proportion of internet users (%)

Finding out about public services

- **Adults 16+**: 49% (2005), 78% (2014)
- **16-24**: 40% (2005), 69% (2014)
- **25-34**: 54% (2005), 83% (2014)
- **35-44**: 51% (2005), 88% (2014)
- **45-54**: 57% (2005), 81% (2014)
- **55+**: 44% (2005), 70% (2014)

Looking at political or campaigning issues websites

- **Adults 16+**: 19% (2005), 44% (2014)
- **16-24**: 24% (2005), 40% (2014)
- **25-34**: 18% (2005), 50% (2014)
- **35-44**: 20% (2005), 51% (2014)
- **45-54**: 18% (2005), 44% (2014)
- **55+**: 11% (2005), 33% (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
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)
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
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
**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

Proportion of internet users (%)

<table>
<thead>
<tr>
<th>Pay by card</th>
<th>Give home address</th>
<th>Give home phone number</th>
<th>Give mobile phone number</th>
<th>Give personal email address</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>2%</td>
<td>2%</td>
<td>8%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>2%</td>
<td>2%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>18%</td>
<td>16%</td>
<td>24%</td>
<td>25%</td>
<td>9%</td>
</tr>
<tr>
<td>48%</td>
<td>46%</td>
<td>44%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>57%</td>
<td>60%</td>
<td>48%</td>
<td>49%</td>
<td>34%</td>
</tr>
<tr>
<td>17%</td>
<td>21%</td>
<td>19%</td>
<td>21%</td>
<td>5%</td>
</tr>
<tr>
<td>28%</td>
<td>36%</td>
<td>30%</td>
<td>34%</td>
<td>54%</td>
</tr>
<tr>
<td>18%</td>
<td>21%</td>
<td>21%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>6%</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

Proportion of internet users (%)

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

Proportion of internet users (%)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2005</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults 16+</td>
<td>43%</td>
<td>55%</td>
</tr>
<tr>
<td>16-24</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>25-34</td>
<td>48%</td>
<td>60%</td>
</tr>
<tr>
<td>35-44</td>
<td>42%</td>
<td>59%</td>
</tr>
<tr>
<td>45-54</td>
<td>39%</td>
<td>58%</td>
</tr>
<tr>
<td>55-64</td>
<td>37%</td>
<td>56%</td>
</tr>
<tr>
<td>65+</td>
<td>*</td>
<td>48%</td>
</tr>
</tbody>
</table>

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
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.
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, Quarter 1 2015

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.
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

Figure 1.110

Take-up of tablet computers across UK

Households (%) take-up of tablet computers

<table>
<thead>
<tr>
<th>Nation</th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>54%</td>
<td>54%</td>
<td>52%</td>
<td>60%</td>
<td>54%</td>
</tr>
<tr>
<td>Figures above the bars denote change in %pts compared to Q1 2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

QE1. Does your household have a PC, laptop, netbook or tablet computer?
Source: Ofcom Technology Tracker, Quarter 1 2015
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
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

Proportion of premises (%)

Source: Ofcom / operators, May 2015 data
Note: Coverage is based on 100m square pixels covering the UK
Average weekly reach and listening hours: 2014

<table>
<thead>
<tr>
<th>Region</th>
<th>Average weekly listening</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>21.5 hours</td>
<td>89.4%</td>
</tr>
<tr>
<td>Scotland</td>
<td>19.9 hours</td>
<td>86.9%</td>
</tr>
<tr>
<td>Wales</td>
<td>22.4 hours</td>
<td>94.5%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>21.6 hours</td>
<td>88.9%</td>
</tr>
<tr>
<td>UK TOTAL</td>
<td>21.4 hours</td>
<td>89.5%</td>
</tr>
</tbody>
</table>

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.
QP9. How many DAB sets do you have in your household?
Source: Ofcom Technology Tracker, Wave 1 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?
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**