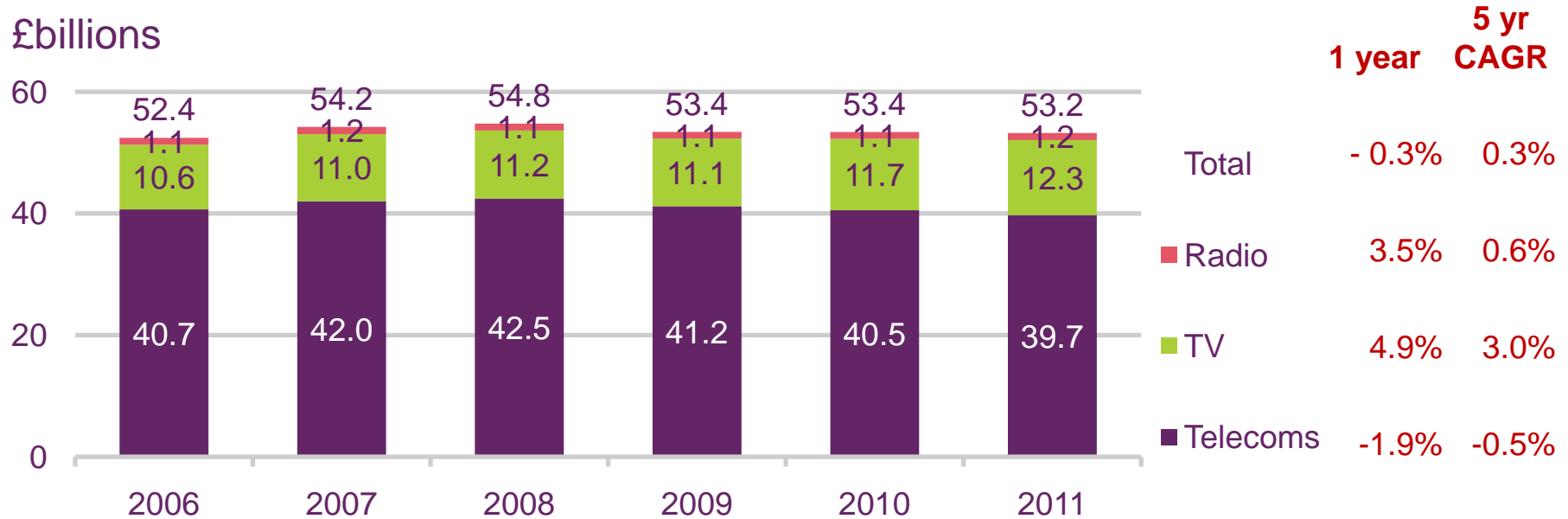


# Figure 1.1

## Communications industry revenues



Note: Includes licence fee allocation for radio and TV, Figures are in nominal terms

# Figure 1.2

## Digital communications service availability



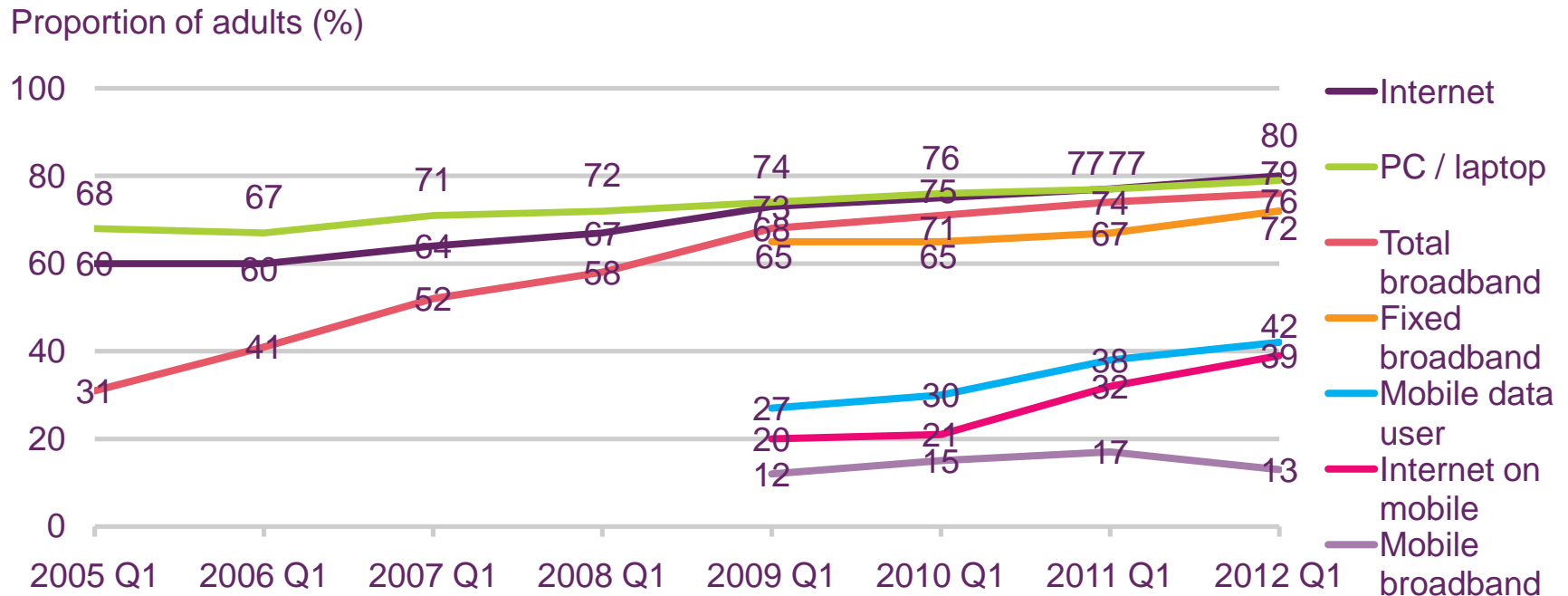
Platform	UK 2011	UK 2010	UK change	England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0pp	100%	100%	100%	100%
2G mobile <sup>1</sup>	99.7%	n/a	n/a	99.8%	99.2%	99.2%	98.7%
3G mobile <sup>2</sup>	99.1%	n/a	n/a	99.7%	97.0%	97.6%	88.3%
Cable broadband <sup>3</sup>	44%	44%	0pp	47%	35%	23%	29%
LLU <sup>4</sup>	92%	89%	+3pp	93%	84%	88%	79%
FTTC <sup>5</sup>	31%	16%	+15pp	33%	10%	17%	87%
Superfast broadband	60%	53%	+7pp	62%	42%	34%	94%
Digital satellite TV	98%	98%	0	-	-	-	-
Digital terrestrial TV <sup>6</sup>	97%	85%	12pp	98%	99%	98%	66%
DAB BBC Network <sup>7</sup>	94.3%	92%	+2.3pp	95.5%	90.9%	85.9%	85.4%
DAB commercial network (Digital One) <sup>8</sup>	85%	85%	-	90%	75%	60%	-

Sources: Ofcom and operators:

1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator. Data are not comparable with previous report due to changes made by the mobile operators in the methodology used to calculate coverage .
2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator. Data are not comparable with previous report due to changes made by the mobile operators in the methodology used to calculate coverage.
3. Proportion of homes passed by Virgin Media's cable broadband network, May 2012; excludes households that are not also able to receive Virgin Media's cable fixed telecoms and/or pay-TV services.
4. Proportion of homes connected to an LLU-enabled BT local exchange, December 2011;
5. Ofcom estimate of proportion of homes able to receive FTT services based on the proportion of homes in FTTC-enabled BT local exchange areas, March 2012;
6. Calculations based on the estimated proportion of homes that can now receive at least 17 channels, versus the coverage of the DTT signal prior to digital switch-over.
7. BBC National DAB network coverage as of April 2012 <http://stakeholders.ofcom.org.uk/broadcasting/radio/coverage/dab-coverage/>
8. Digital One coverage (indoor proportional method – households), April 2012 <http://stakeholders.ofcom.org.uk/broadcasting/radio/coverage/dab-coverage/>

# Figure 1.3

## Household internet take-up



QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the Internet/Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the Internet at home?

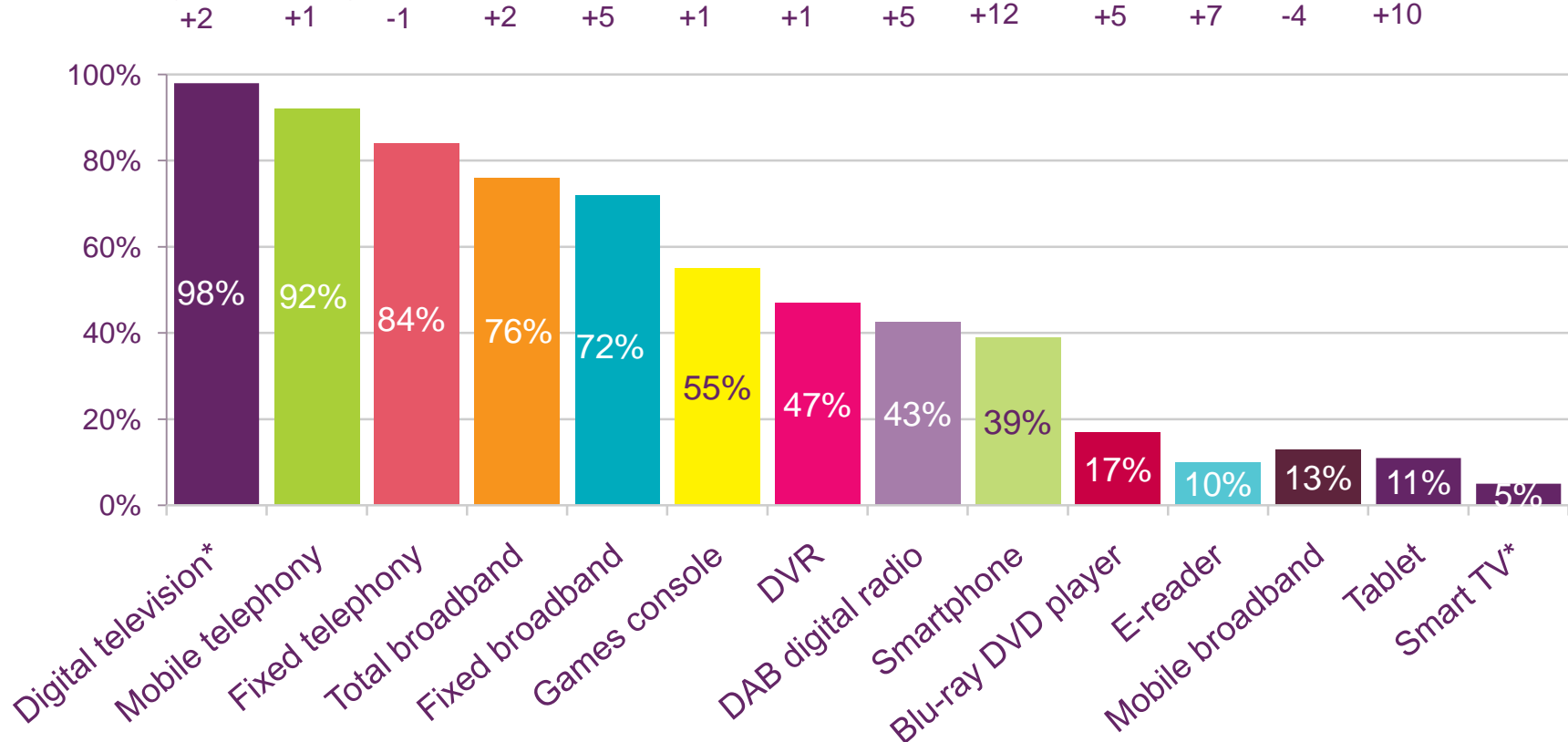
Source: Ofcom technology tracker, Q1 2012. Base: All adults aged 16+ (n=3772)

Note 1: "Internet on mobile" is the % of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, Email, Internet access, downloading video, video streaming, visiting social networking sites. Note 2: From Q1 2009 the 'Internet' figure includes those who access the internet on mobile phones.

# Figure 1.4

## Take-up of key comms services

Percentage point change vs 2011



Source: Ofcom research, Q1 2012. DAB take-up from RAJAR Q1 2012.

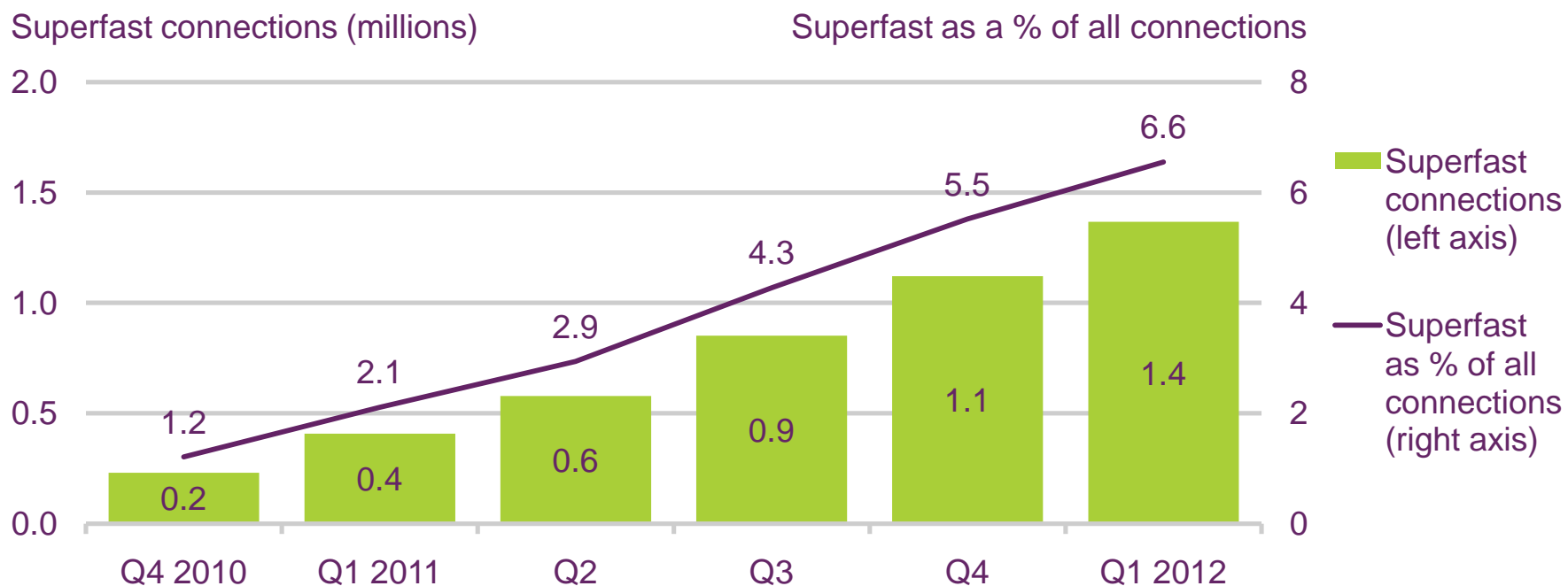
Base: All adults aged 16+ (n=3772)

Base for DTV and Smart TV: Households with a TV

Mobile telephony, smartphone and e-reader figures refer to personal take-up, all other figures refer to household take-up

# Figure 1.5

## Take-up of superfast broadband services



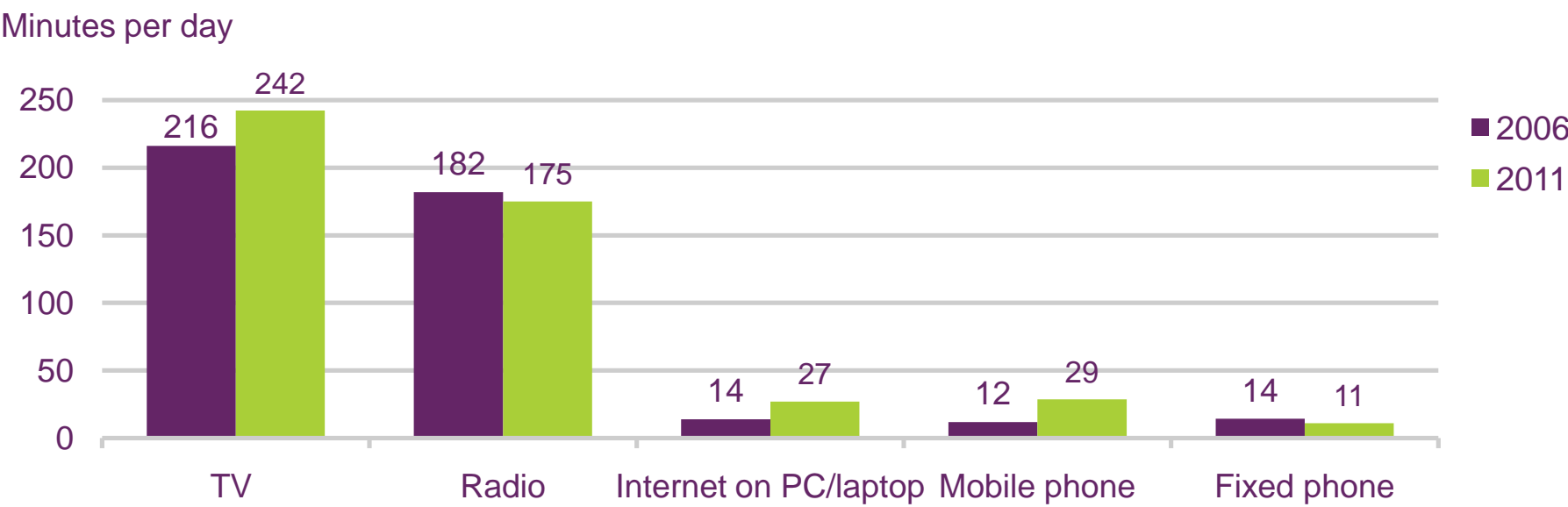
Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators

# Figure 1.6



## Average time per day spent using communications services

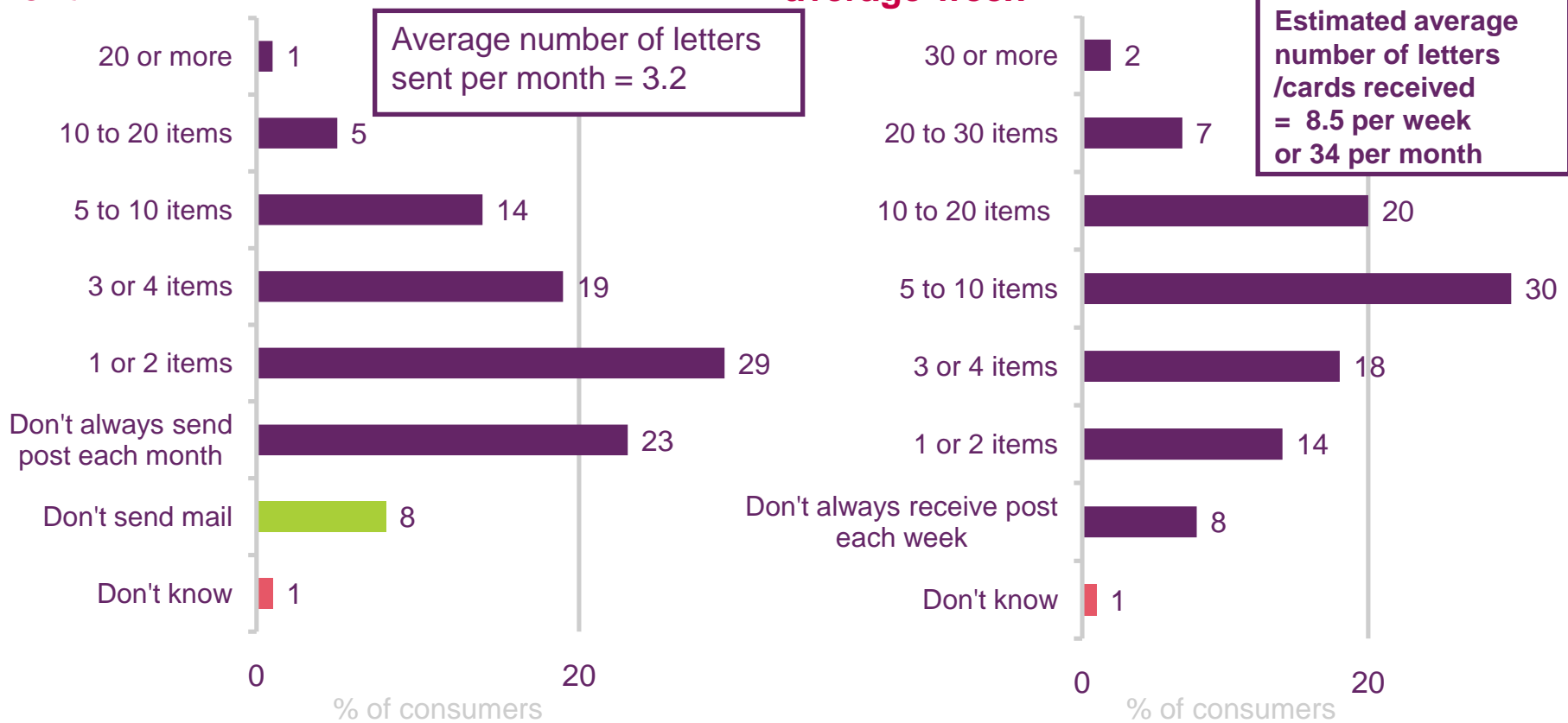


Source: Ofcom / BARB / RAJAR / Nielsen Netratings (home use only) / Strategy Analytics  
Note: Daily figures for mobile voice & data and fixed voice were calculated from monthly data on the assumption that there are 30.4 days in the average month; for the internet consumption figures relate to March of each year, and 31 days was used; the estimated internet consumption on a PC/laptop figures include the use of online applications such as streaming media and only include use at home; mobile telephony figures are Ofcom estimates based on message volume data and Ofcom Digital Day research conducted in 2010

# Figure 1.7

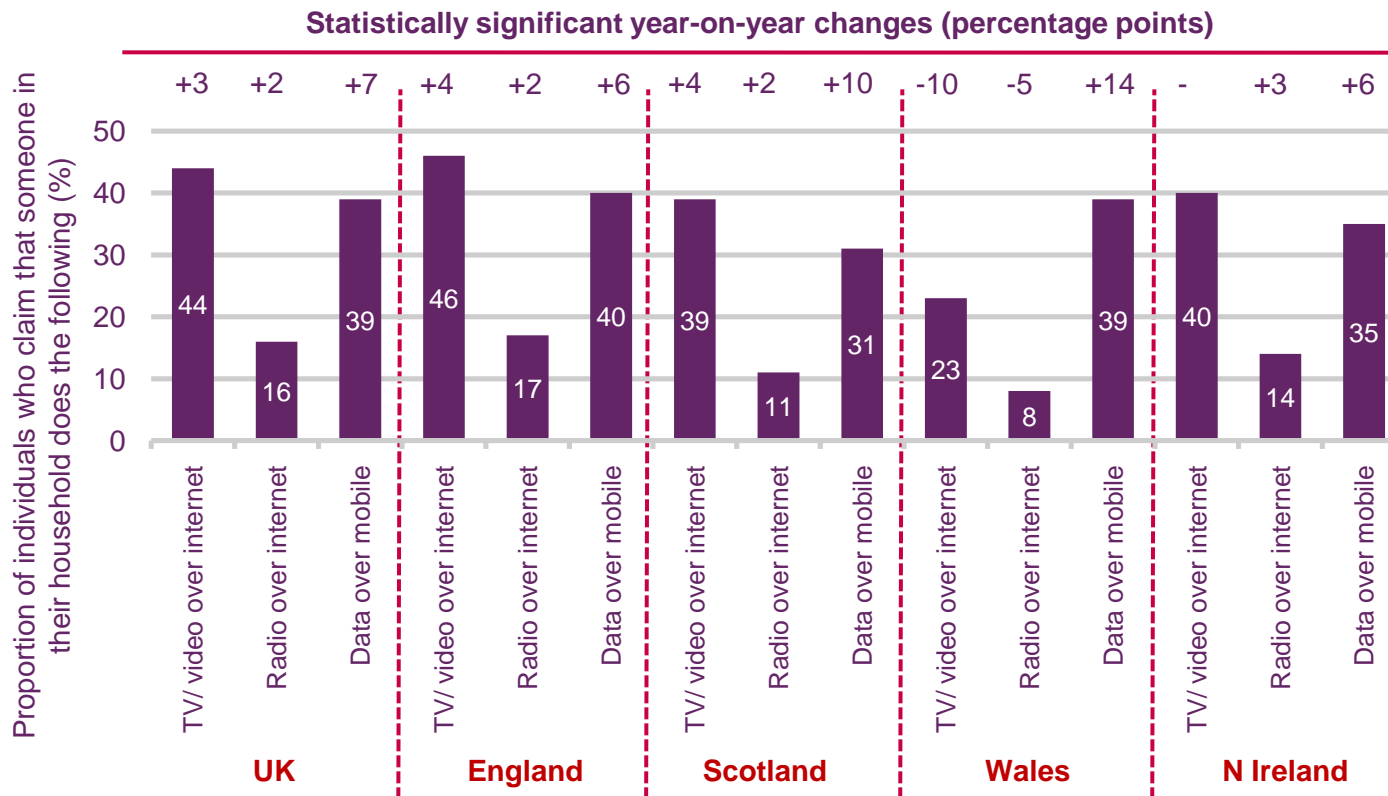


**Claimed volume of letters sent in an average month**      **Claimed volume of letters received in an average week**



Source: Ofcom Post Omnibus 2011 - fieldwork 1<sup>st</sup> Dec – 13<sup>th</sup> Dec 2011. Base: All consumers responsible for sending or receiving post (n= 3621). Question: 'Approximately how many letters and cards, do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately.' Question: 'Approximately how many letters or cards do you receive in an average week? Please don't include parcels, we will ask you about these separately.'

# Figure 1.8 Use of converging platforms



Source: Ofcom research, Quarter 1 2012

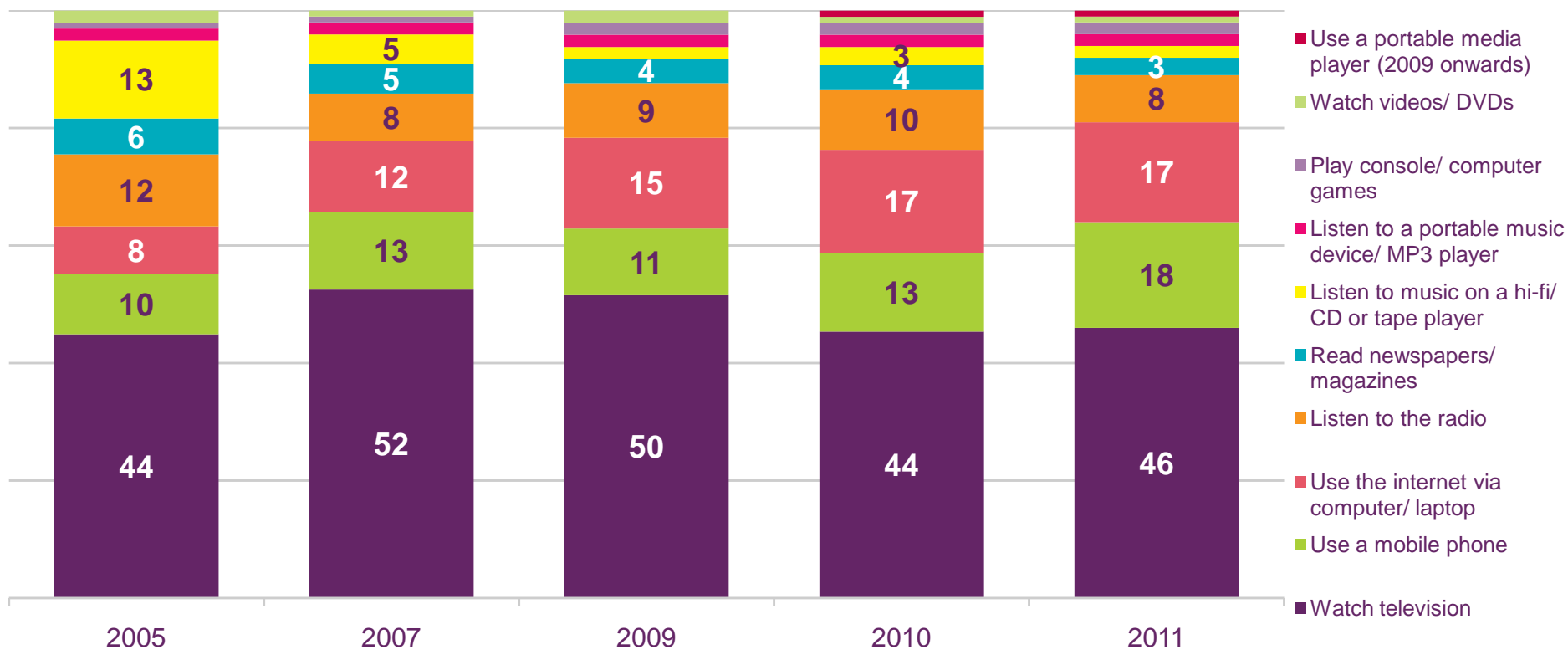
Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland) QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home? QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging





## Figure 1.9

### Which media activity UK adults would miss the most



Source: Ofcom media literacy research, fieldwork carried out by Saville Rossiter-Base

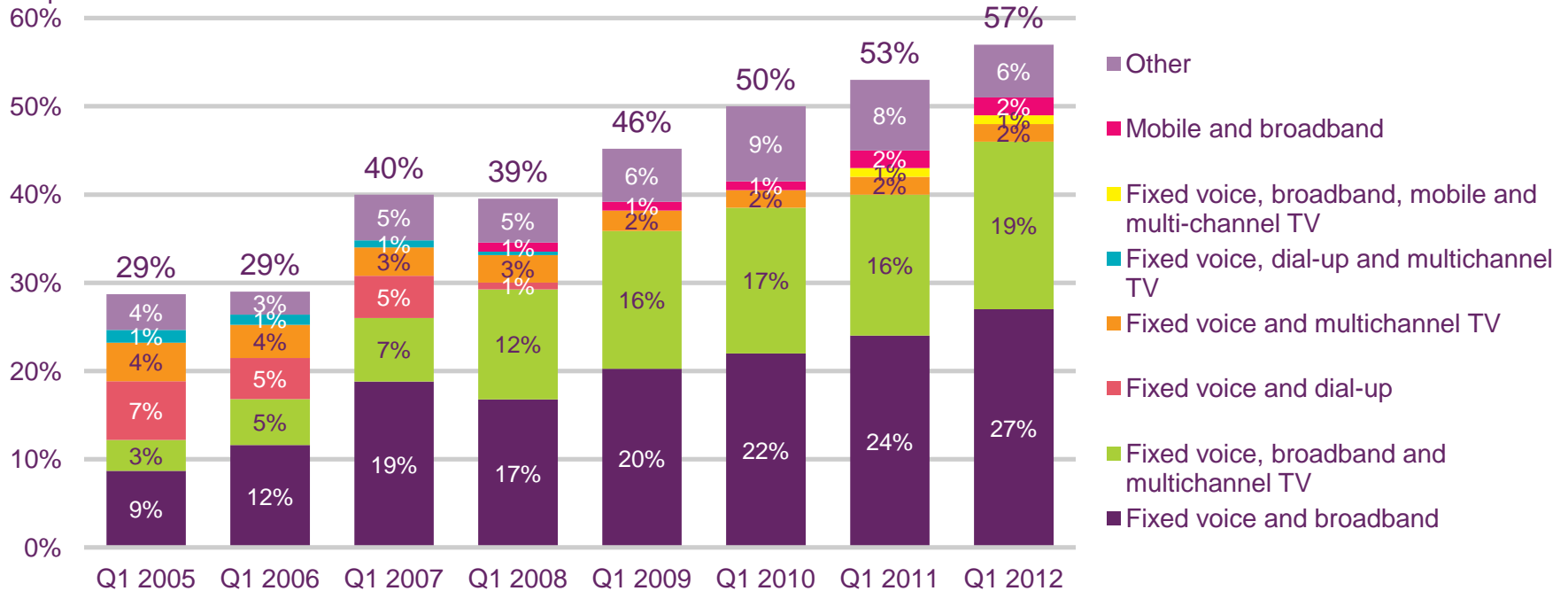
A2 – Which one of these would you miss doing the most?

Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 1824 in 2009, 2117 in 2010, 1823 in 2011).

# Figure 1.10

## Take-up of bundled services over time

Proportion of households



Source: Ofcom technology tracker

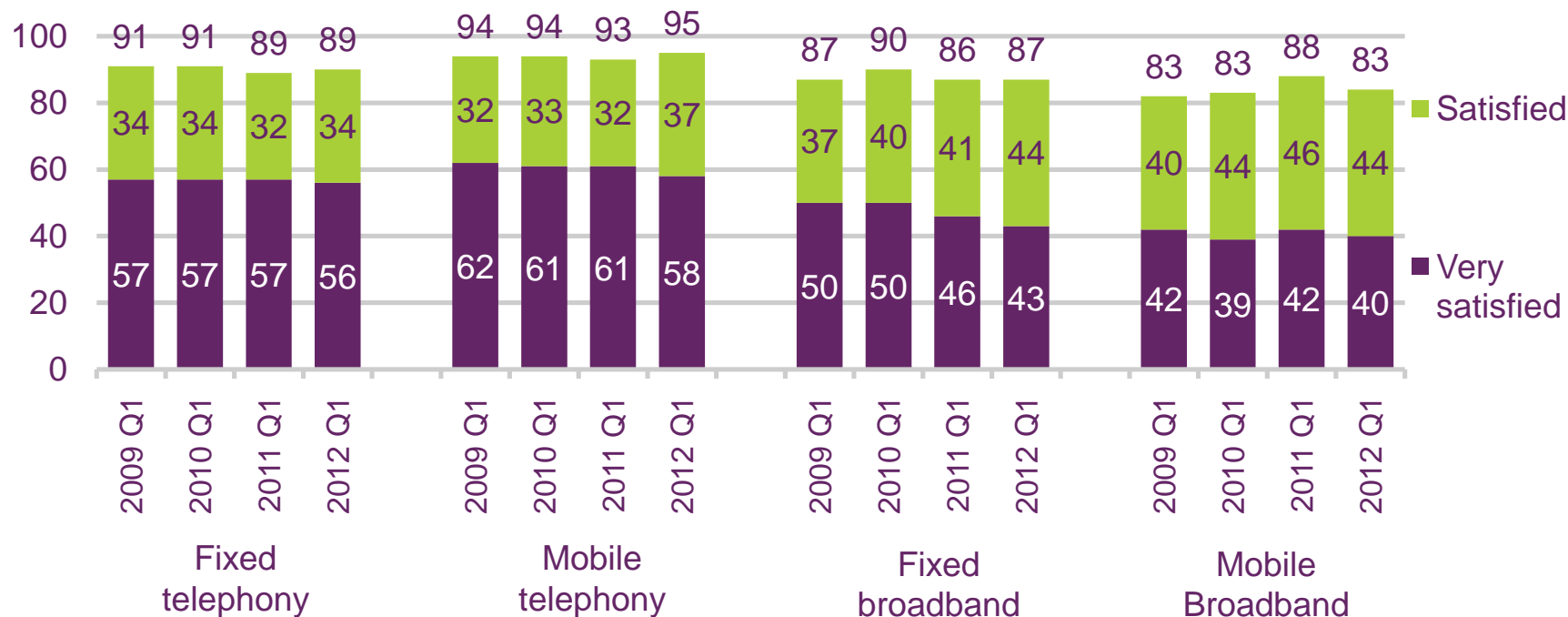
Base: All adults aged 16+ (2012 n=3772)

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

# Figure 1.11

## Overall satisfaction with communication services

Proportion of users of service (per cent)



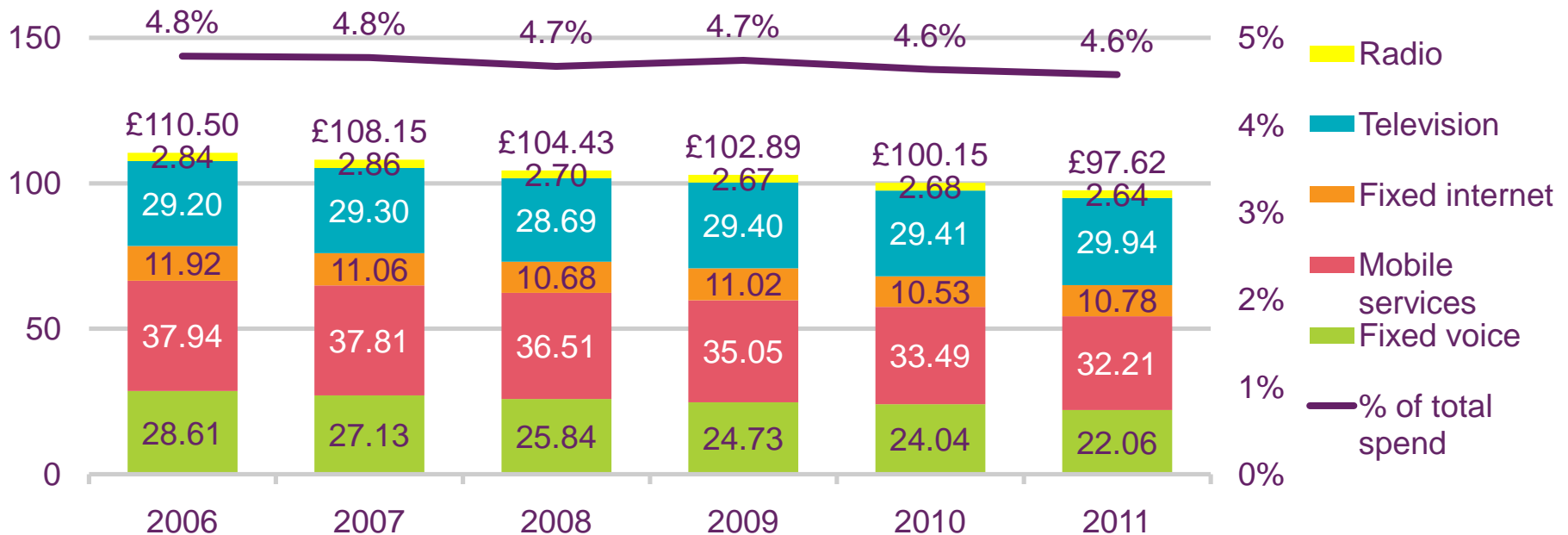
Source: Ofcom research

Note: Shows the proportion of users with each service, includes only those who expressed an opinion.

# Figure 1.12



## Average household spend on communications services



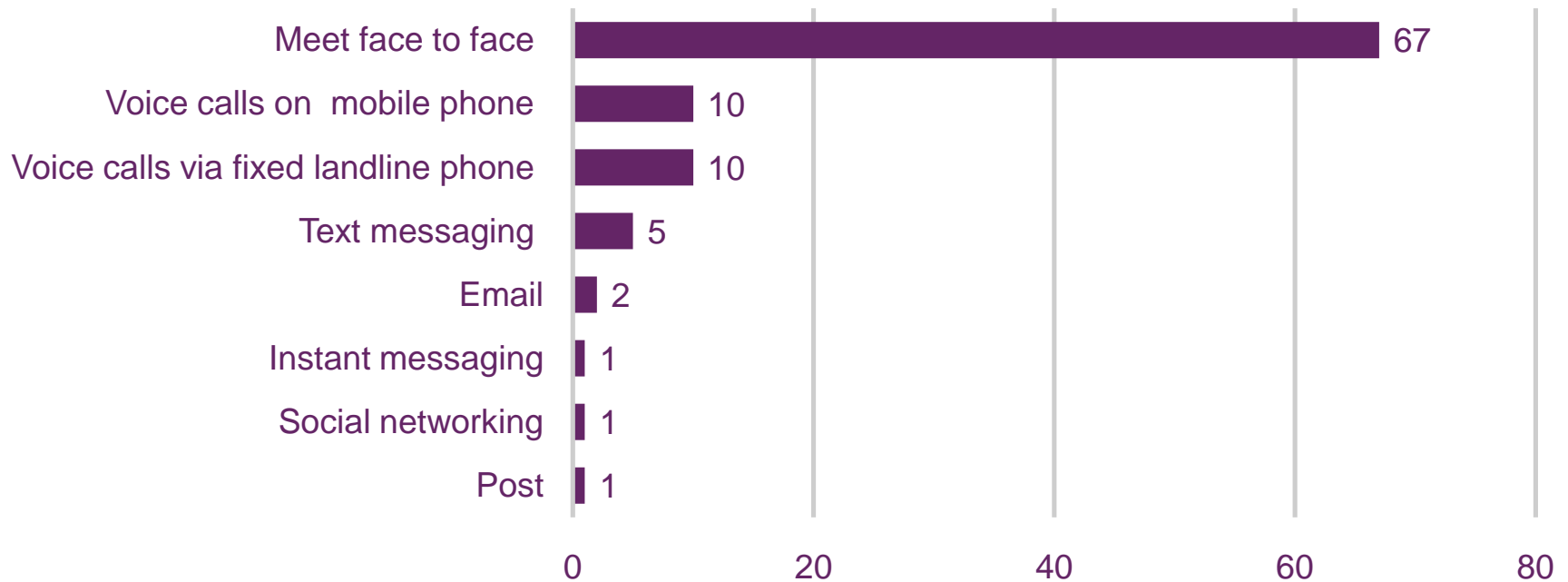
Source: Ofcom / operators/ONS. Notes: Radio data before 2004 were compiled using a different methodology and are not directly comparable to subsequent figures. TV includes pay-per-view from 2004 onwards. Figures expressed in 2011 prices.

# The rise of text based communications

# Figure 1.13

## Preferred method of communication with friends and family

% of adults who communicate with friends and family



Q5a: If you had to pick one method of communicating with friends and family which one would it be?

Source: Ofcom research, 2012

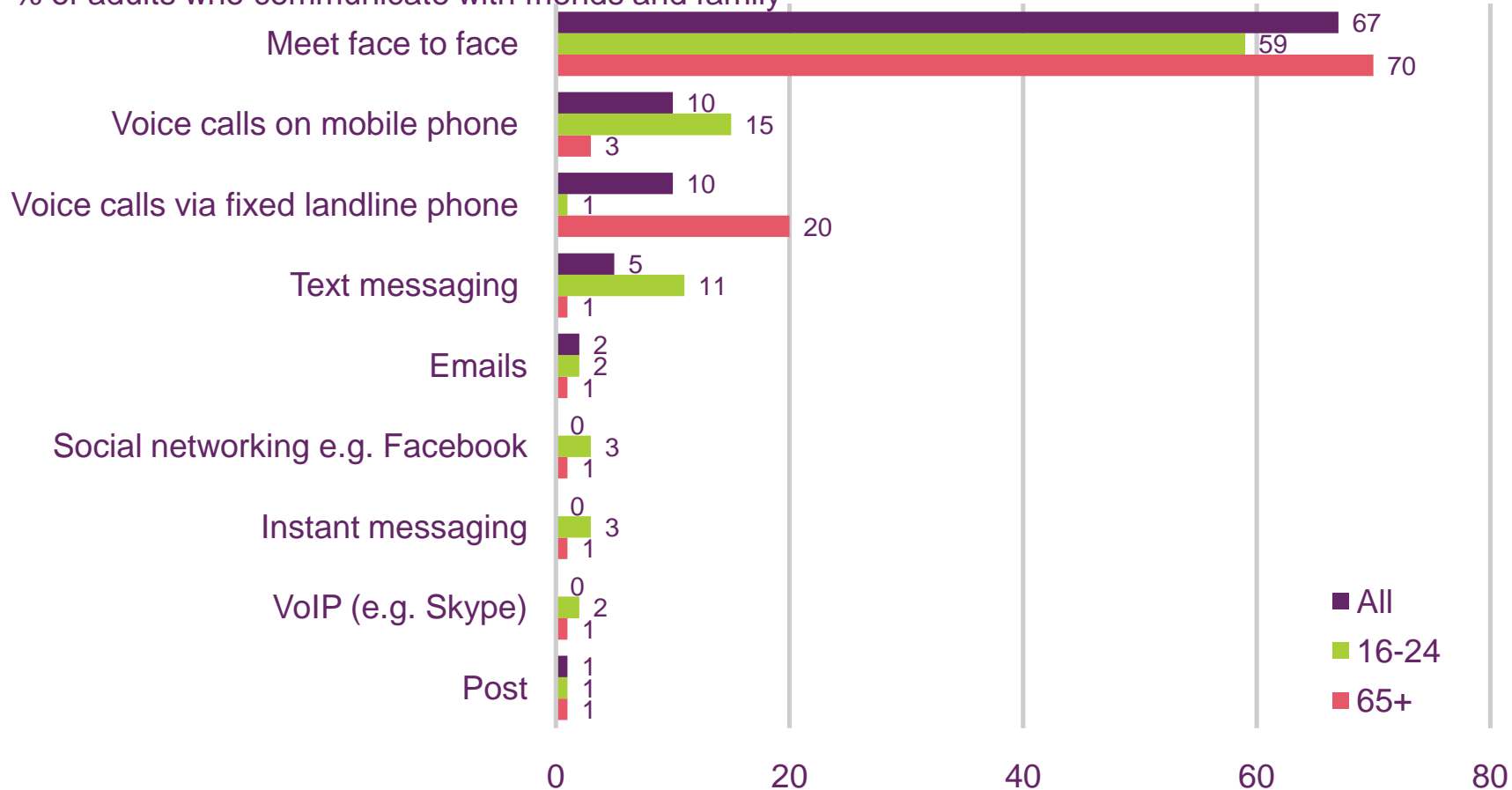
Base: all who ever use at least one form of communication to communicate with: Friends and family, n= 2007. Note - other mentions by 1% or fewer included: Emails, social networking, VoiP calls



# Figure 1.14

## Preferred methods of communication with friends and family by different age groups

% of adults who communicate with friends and family



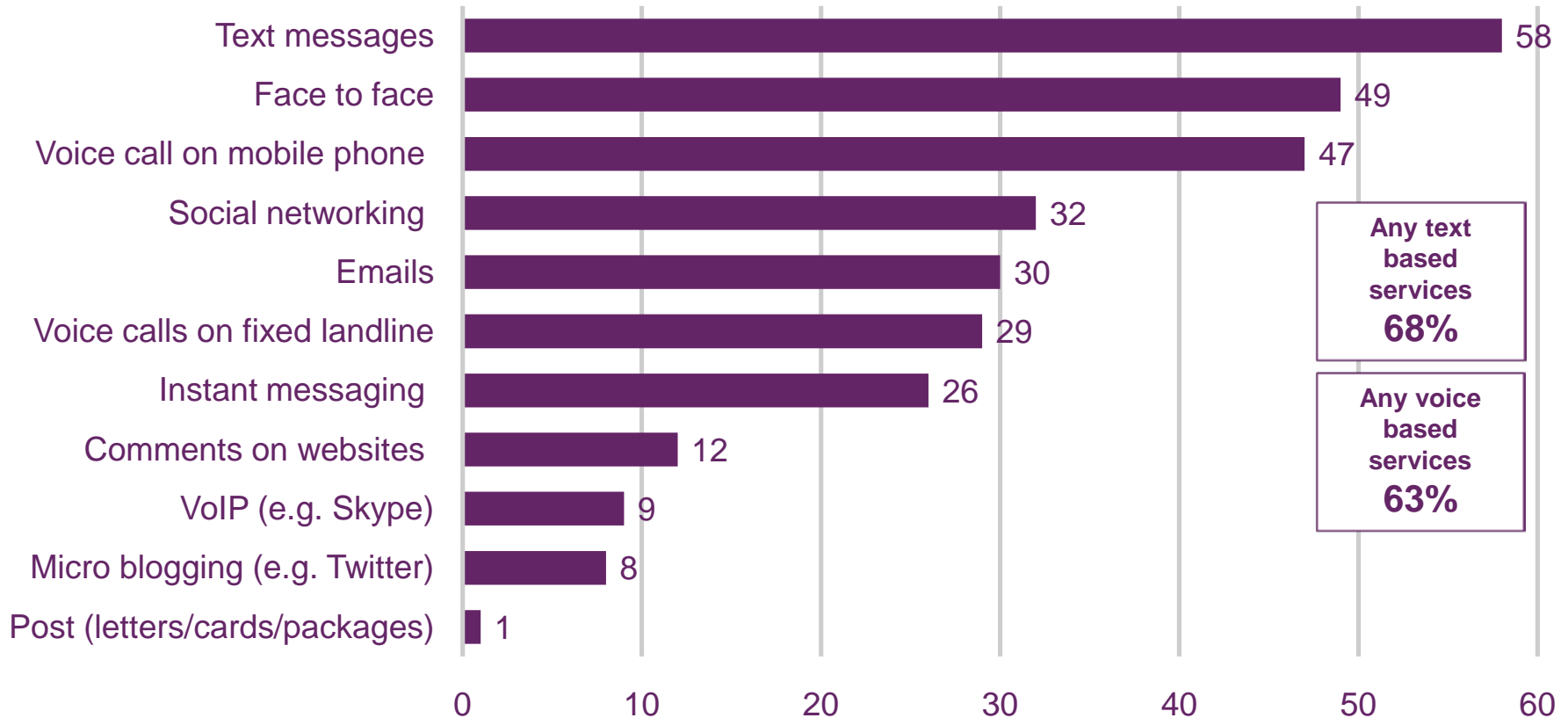
Q5a: If you had to pick one method of communicating with friends and family which one would it be?

Source: Ofcom research, 2012

Base: all who ever use at least one form of communication to communicate with: Friends and family, n= 2007.

# Figure 1.15

## Methods used at least once a day to communicate with friends and family % of adults



Source: Ofcom research, 2012

Q2a: How often do you use x to communicate with friends and family?

Base: UK adults aged 16+ who communicate, n = 1980

Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

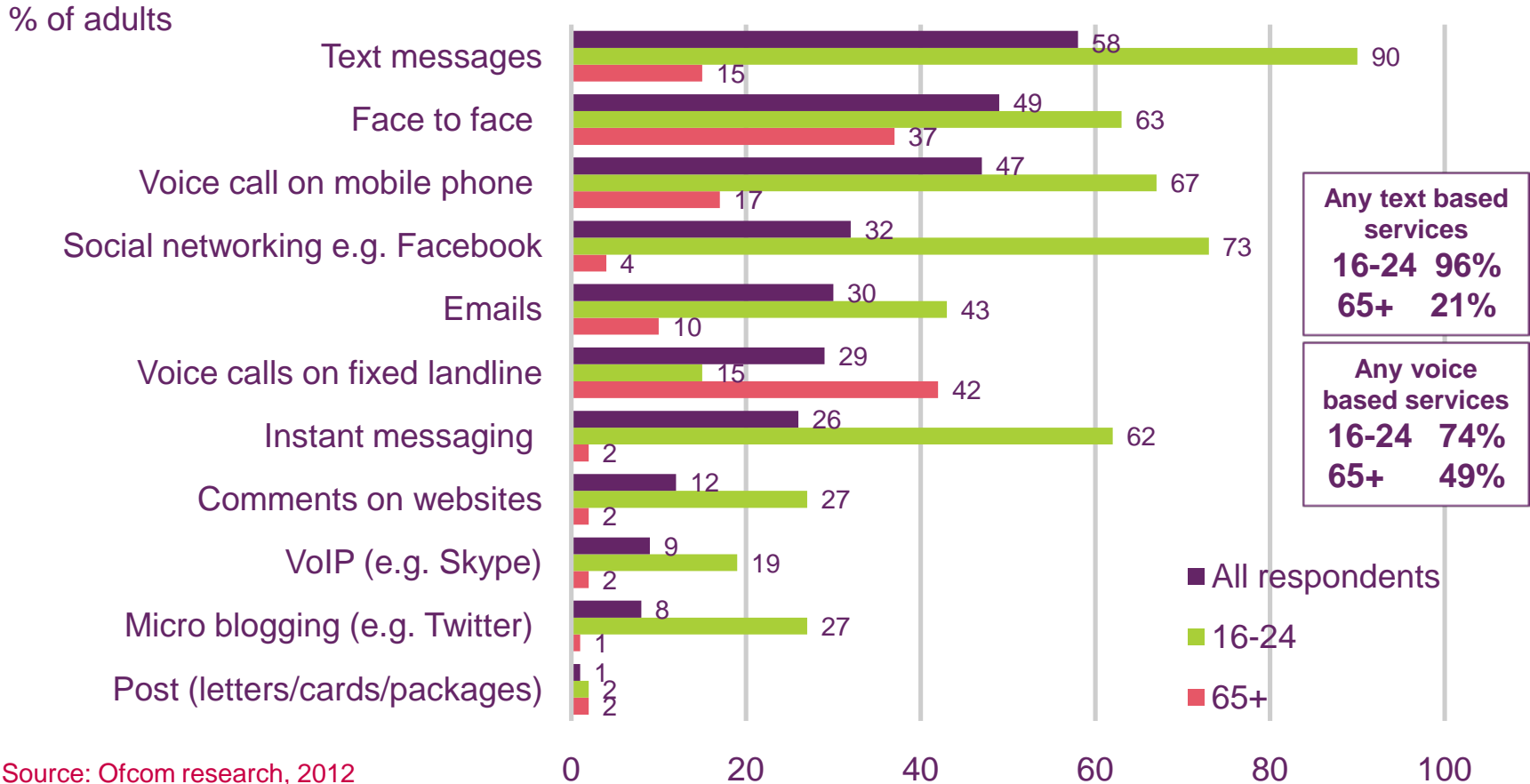
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP



# Figure 1.16



## Methods of communication used at least once a day to communicate with friends and family, by age of respondent



Source: Ofcom research, 2012

Q2a: How often do you use x to communicate with friends and family?

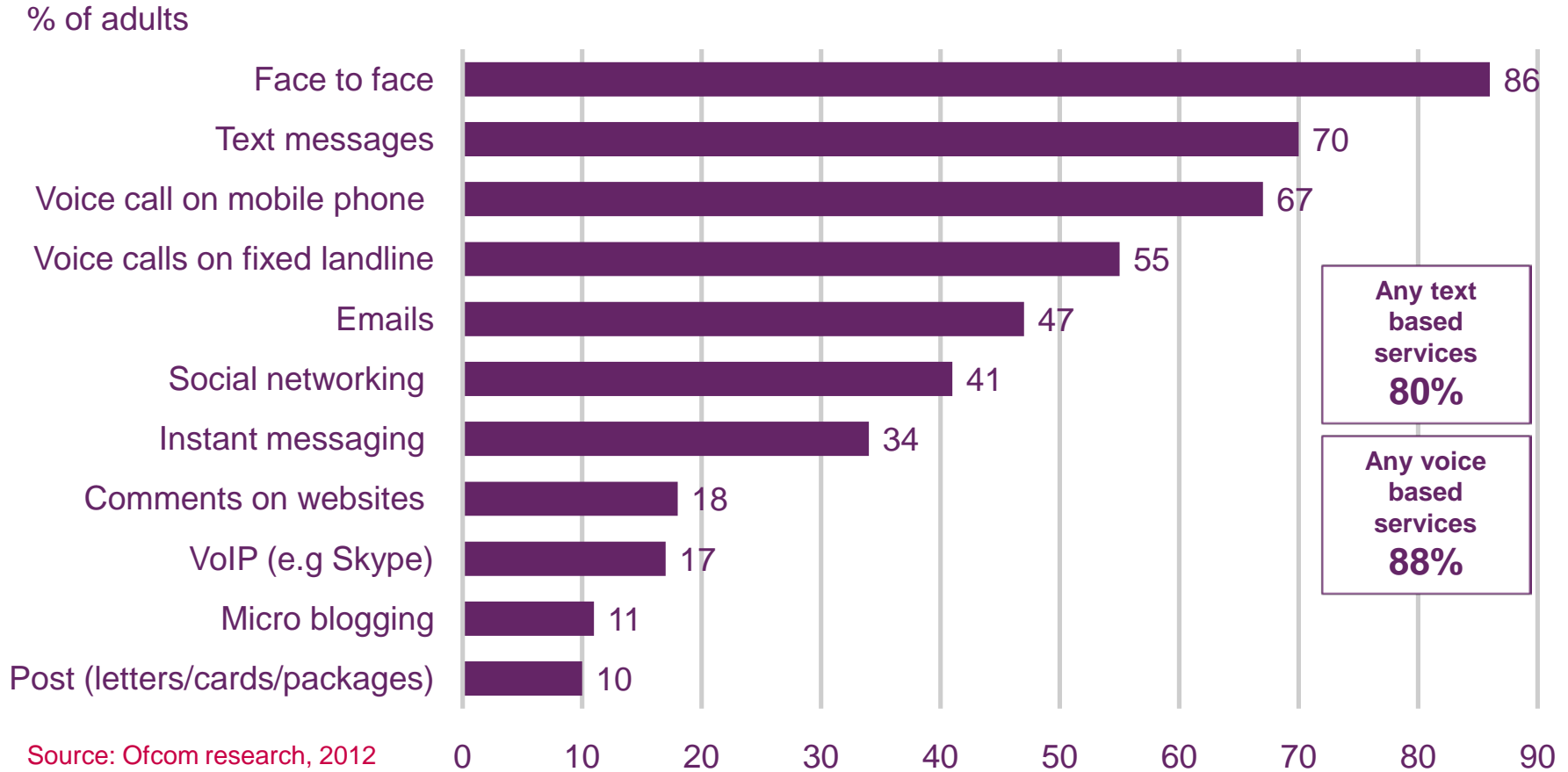
Base: UK adults aged 16+ who communicate, n = 1980

Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.17

## Methods use at least once a week to communicate with friends and family



Source: Ofcom research, 2012

Q2a: How often do you use x to communicate with friends and family?

Base: UK adults aged 16+ who communicate, n = 1980

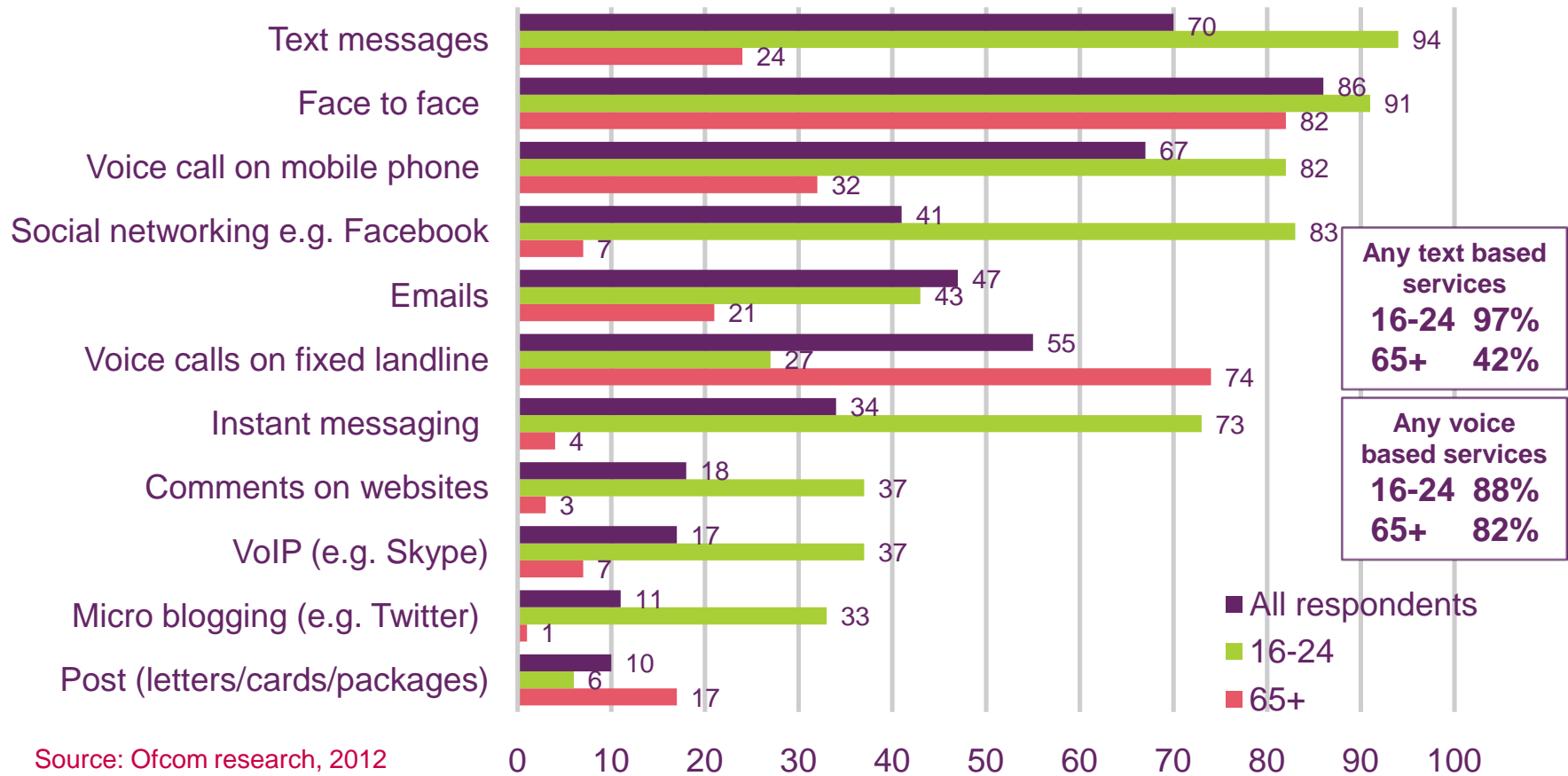
Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.18



## Methods of communication used at least once a week to communicate with friends and family, by age of respondent



Source: Ofcom research, 2012

Q2a: How often do you use x to communicate with friends and family?

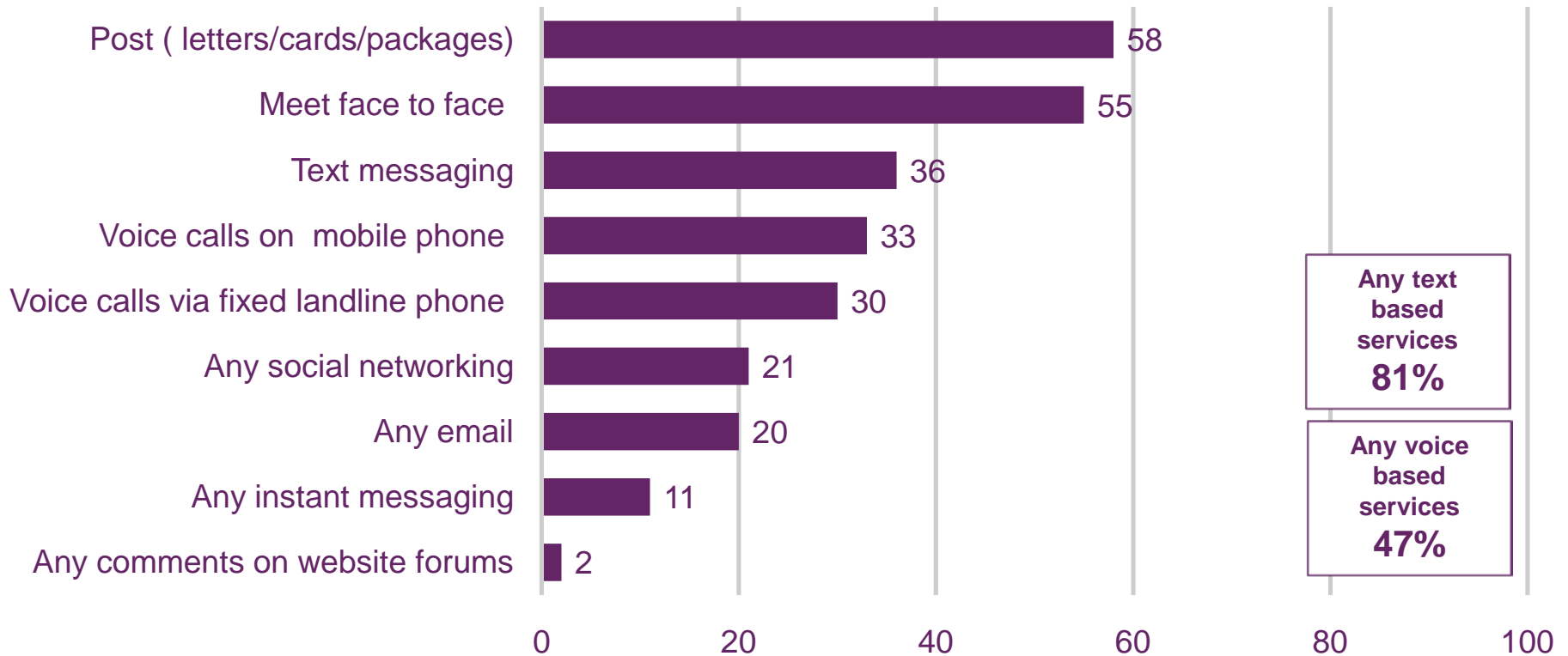
Base: UK adults aged 16+ who communicate, n = 1980

Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.19

## Communication methods ever used to send greetings (e.g. birthdays)



Source: Ofcom research, 2012

Q3a: Thinking about personal communications which of these methods do you ever use to – greetings such as birthday/get well

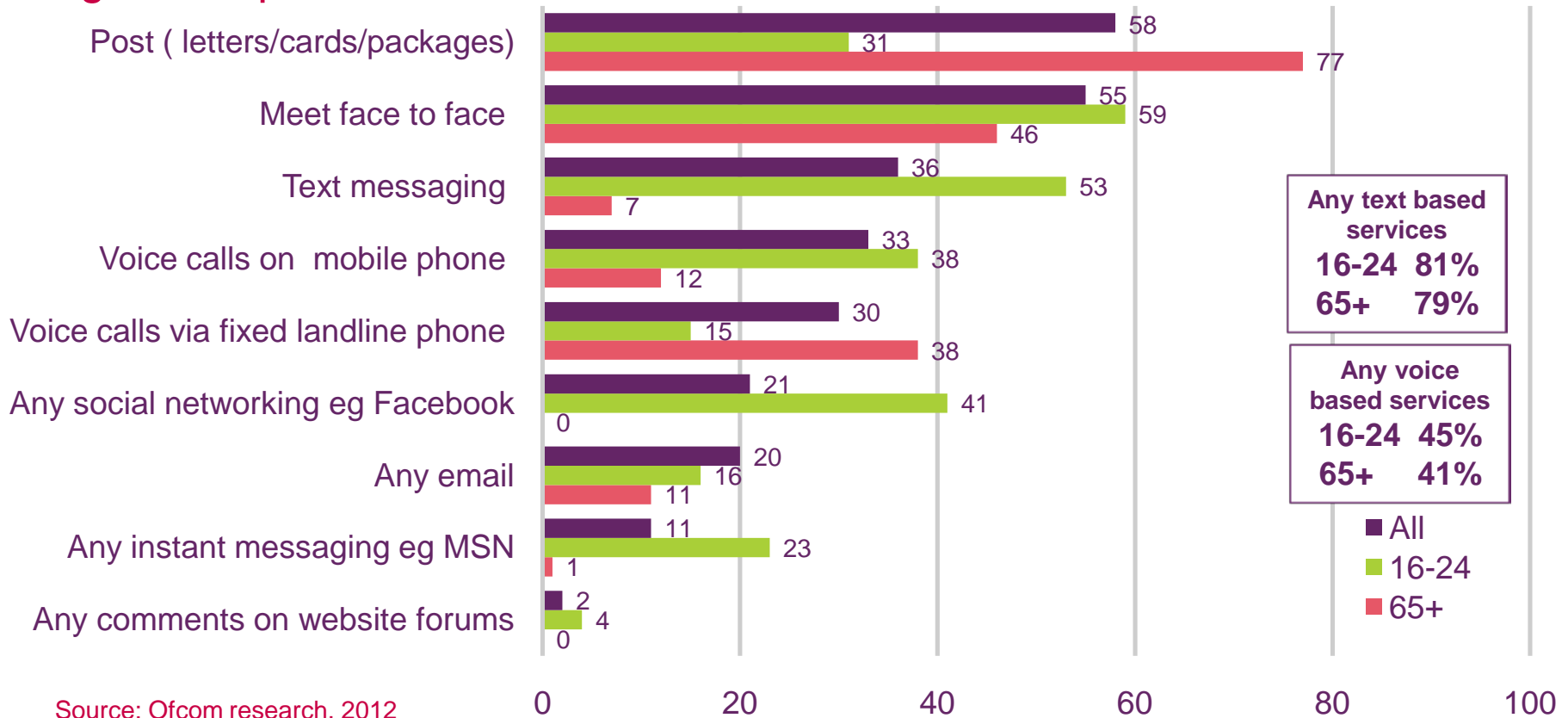
Base: UK adults aged 16+, n = 2012

Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.20

## Communication methods ever used to send greetings (e.g. birthdays) by age of respondent



Source: Ofcom research, 2012

Q3a: Thinking about personal communications which of these methods do you ever use to – greetings such as birthday/get well

Base: UK adults aged 16+, n = 2012

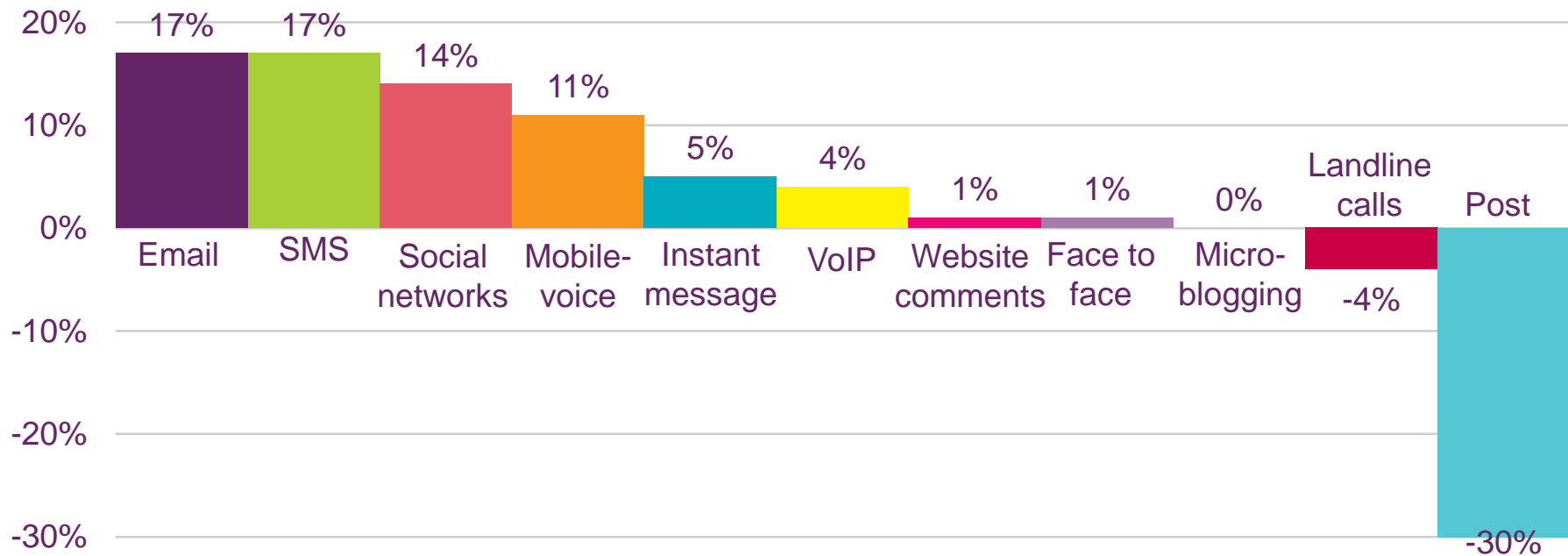
Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.21

## Net claimed changes in communications methods used in last two years

Net percentage change in use of communications methods (claimed)



Source: Ofcom research, 2012

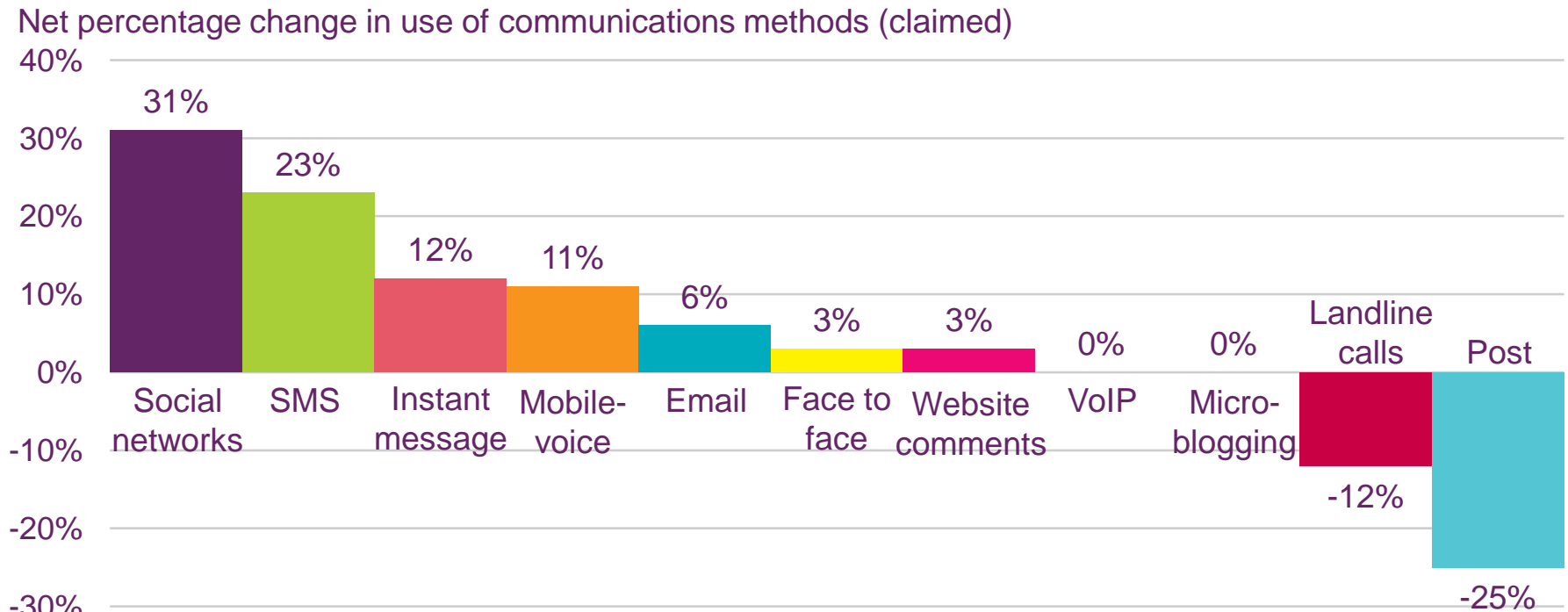
Q6a/6b: Which of these methods of communication do you use to communicate More/ Less than you did 2 years ago?( Multiple choice)

Note chart shows net percentage (% who claimed to use more - % who claimed to use less)

Base: UK adults aged 16+, n=2009

## Figure 1.22

### Net claimed changes in communications methods used in last two years, 16-24 year olds



Source: Ofcom research, 2012

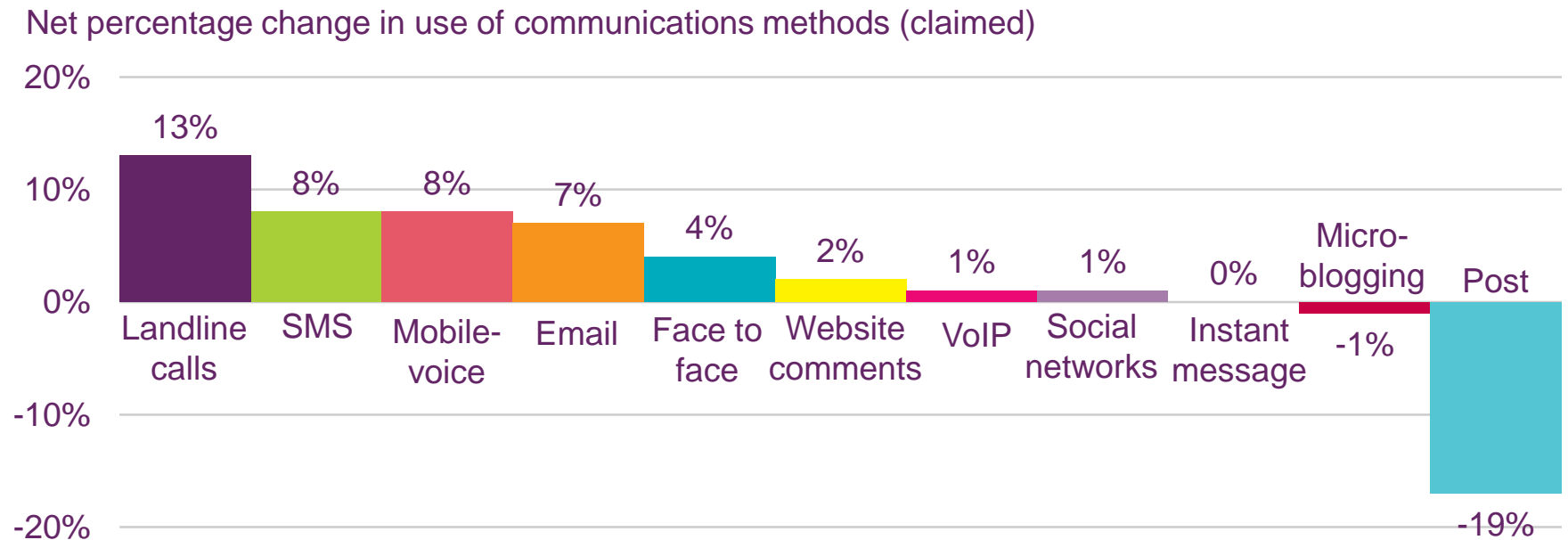
Q6a/6b: Which of these methods of communication do you use to communicate More/ Less than you did 2 years ago? ( Multiple choice)

Note chart shows net percentage (% who claimed to use more - % who claimed to use less)

Base: UK adults aged 16+, n=319

## Figure 1.23

### Net claimed changes in communications methods used in last two years, 65+ year olds



Source: Ofcom research, 2012

Q6a/6b: Which of these methods of communication do you use to communicate More/ Less than you did 2 years ago? ( Multiple choice)

Note chart shows net percentage (% who claimed to use more - % who claimed to use less)

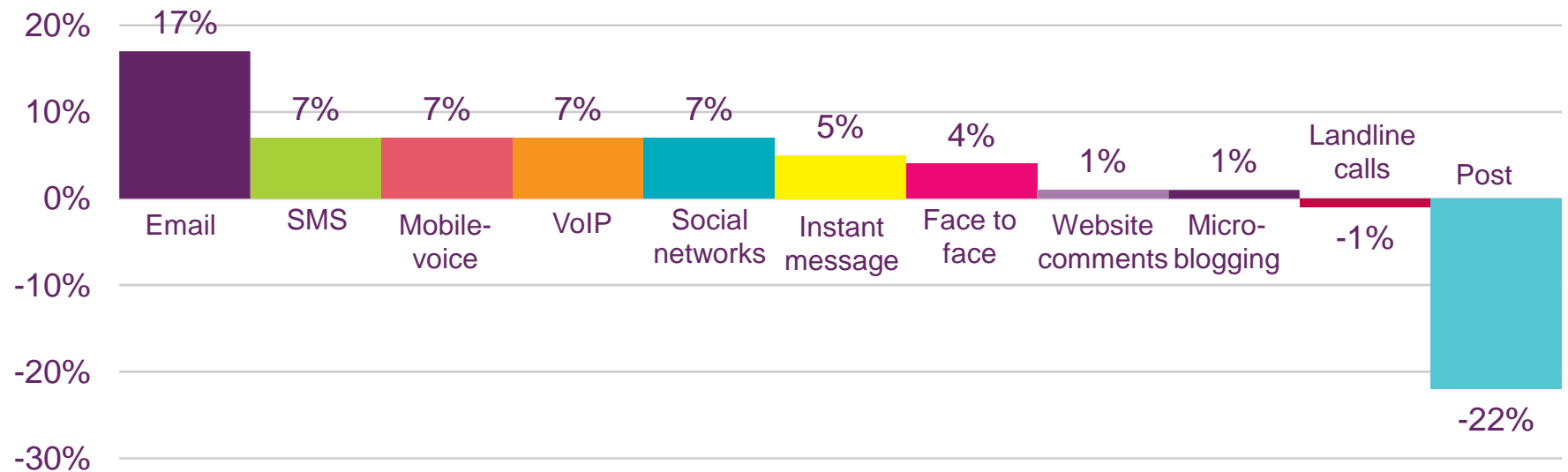
Base: UK adults aged 65+, n=420



# Figure 1.24

## Net predicted changes in communications methods that will be used in next two years

Net percentage predicted change in use of communications methods



Source: Ofcom research, 2012

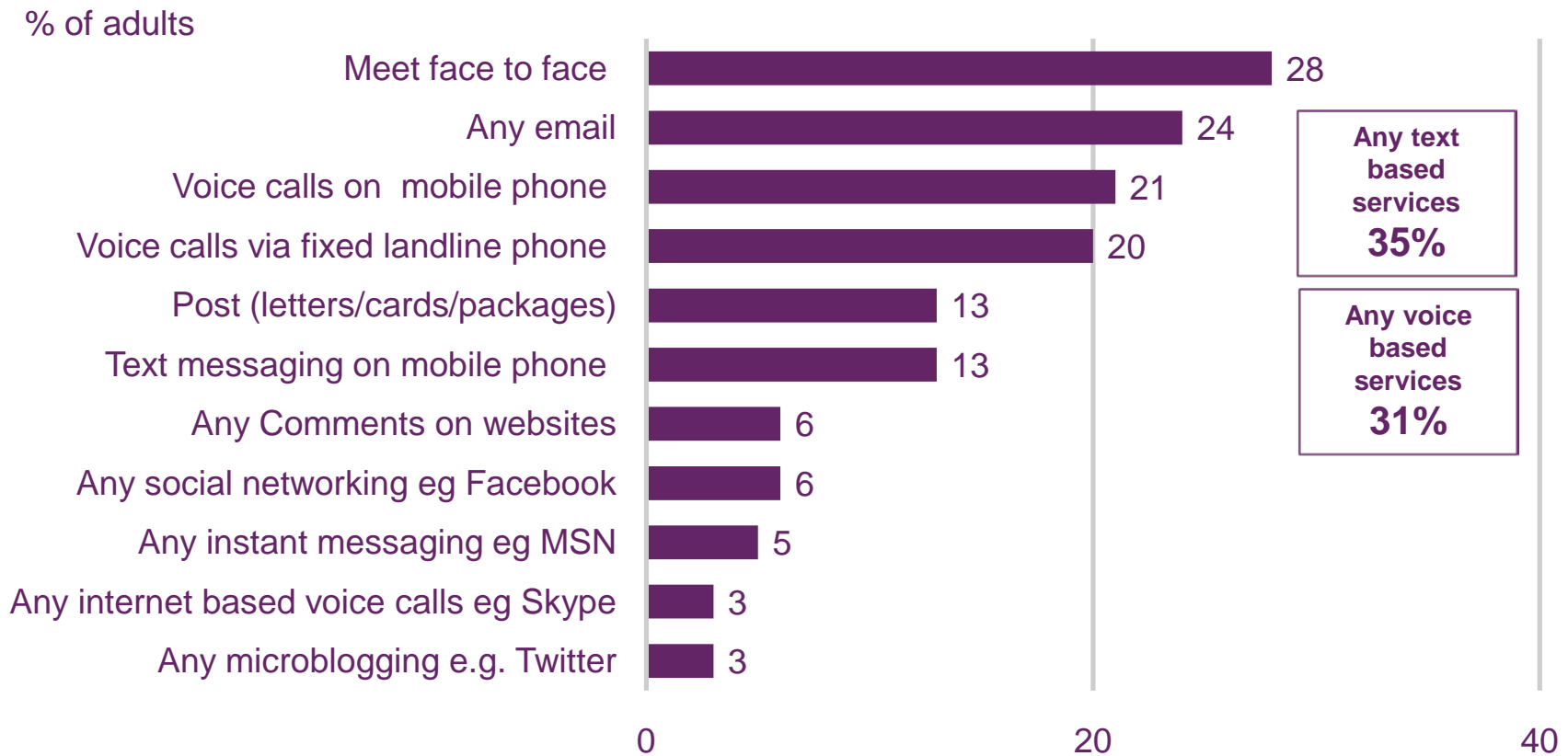
Q7a/7b: In the next 2 years which of them do you think you will use MORE than you do now?

Note chart shows net percentage (% who predict to use more - % who predict to use less)

Base: UK adults aged 16+, n=2009

# Figure 1.25

## Methods used at least once a week to communicate with businesses and services



Q2b How often do you ever use to communicate with business and services?

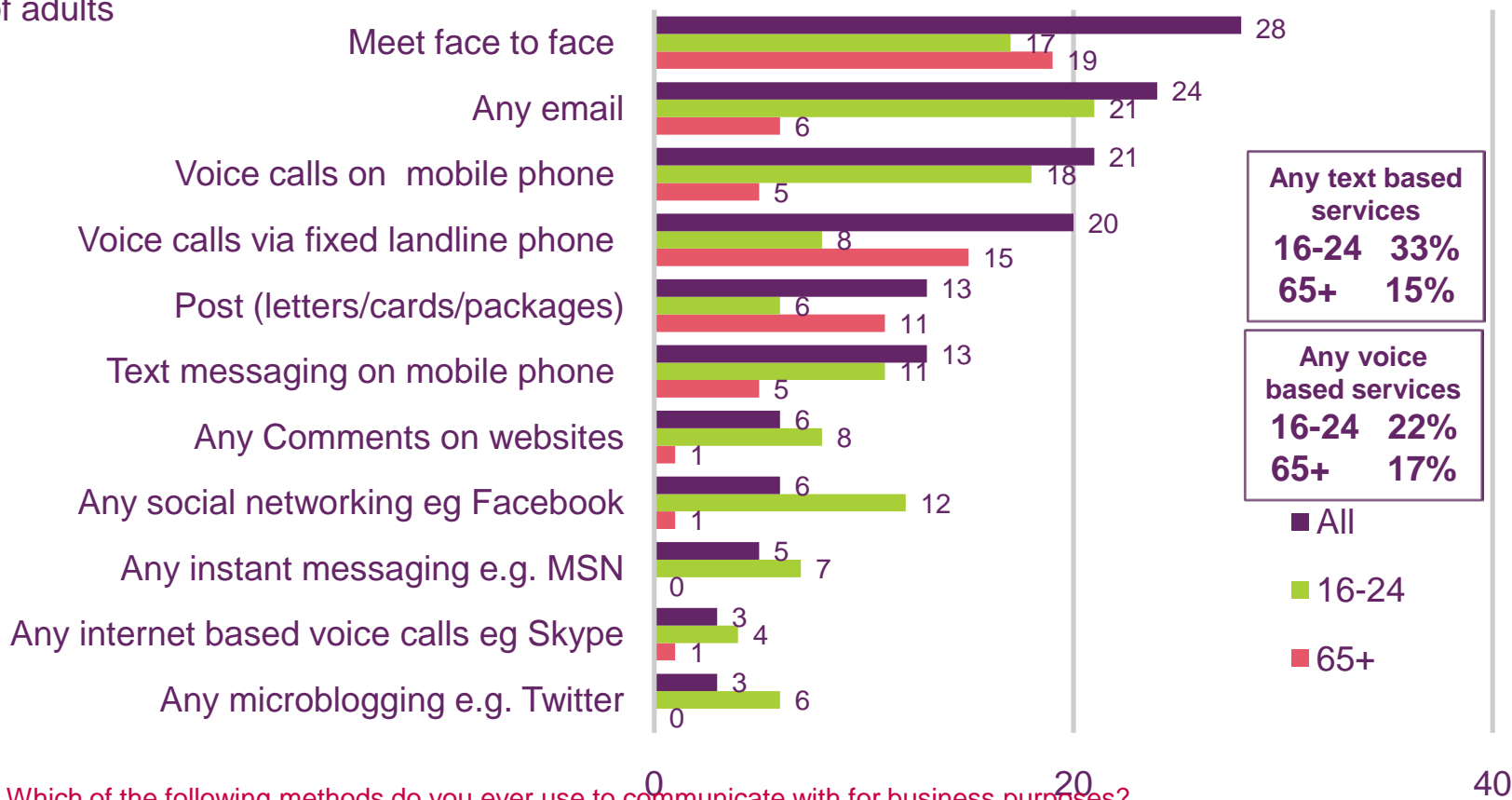
Source: Ofcom research, 2012

Base: UK adults aged 16+, n = 2012

# Figure 1.26

## Methods used at least once a week to communicate with businesses and services, by age

% of adults



Q2b Which of the following methods do you ever use to communicate with for business purposes?

Source: Ofcom research, 2012

Base: UK adults aged 16+, n = 2012

Any text based services: text messages, social networking, emails, instant messaging, comments on websites, micro-blogging, post

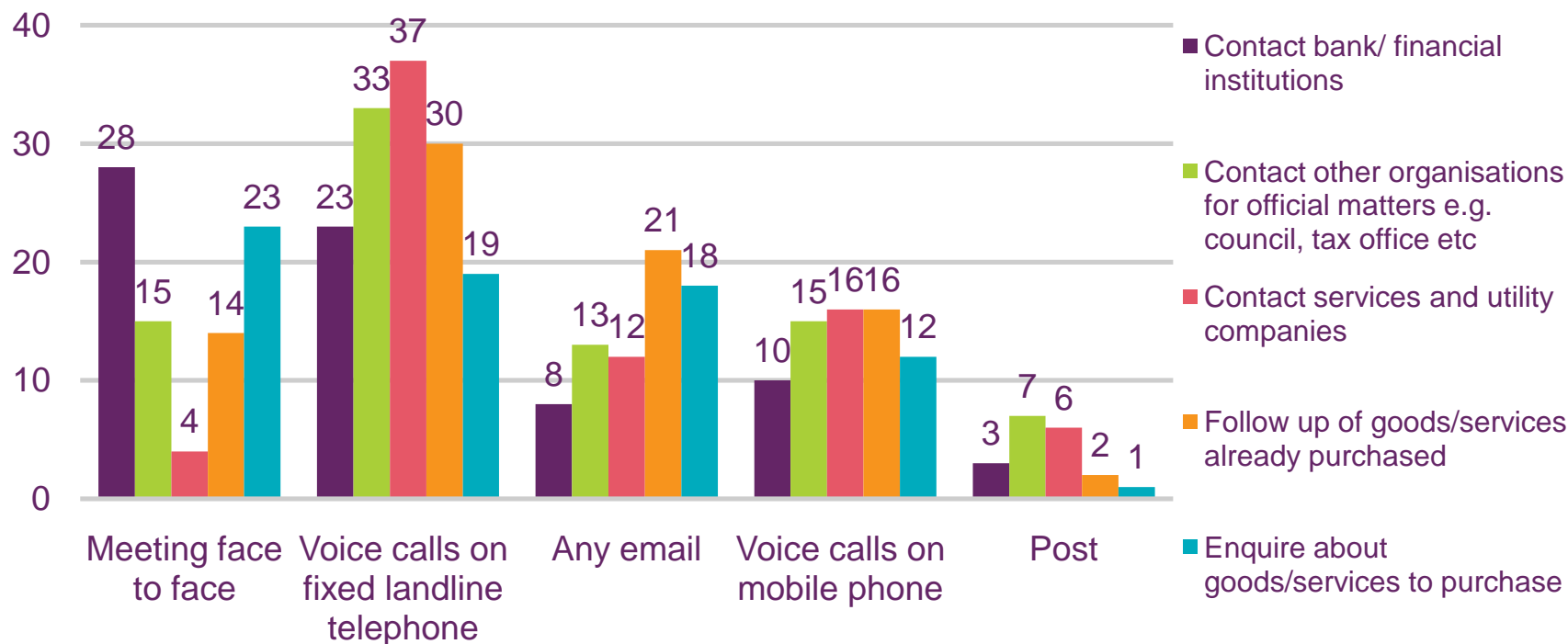
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.27

## Preferred method of communicating with businesses and services

### Top 5 methods

% of adults



Q4b: Generally, which method do you prefer to use

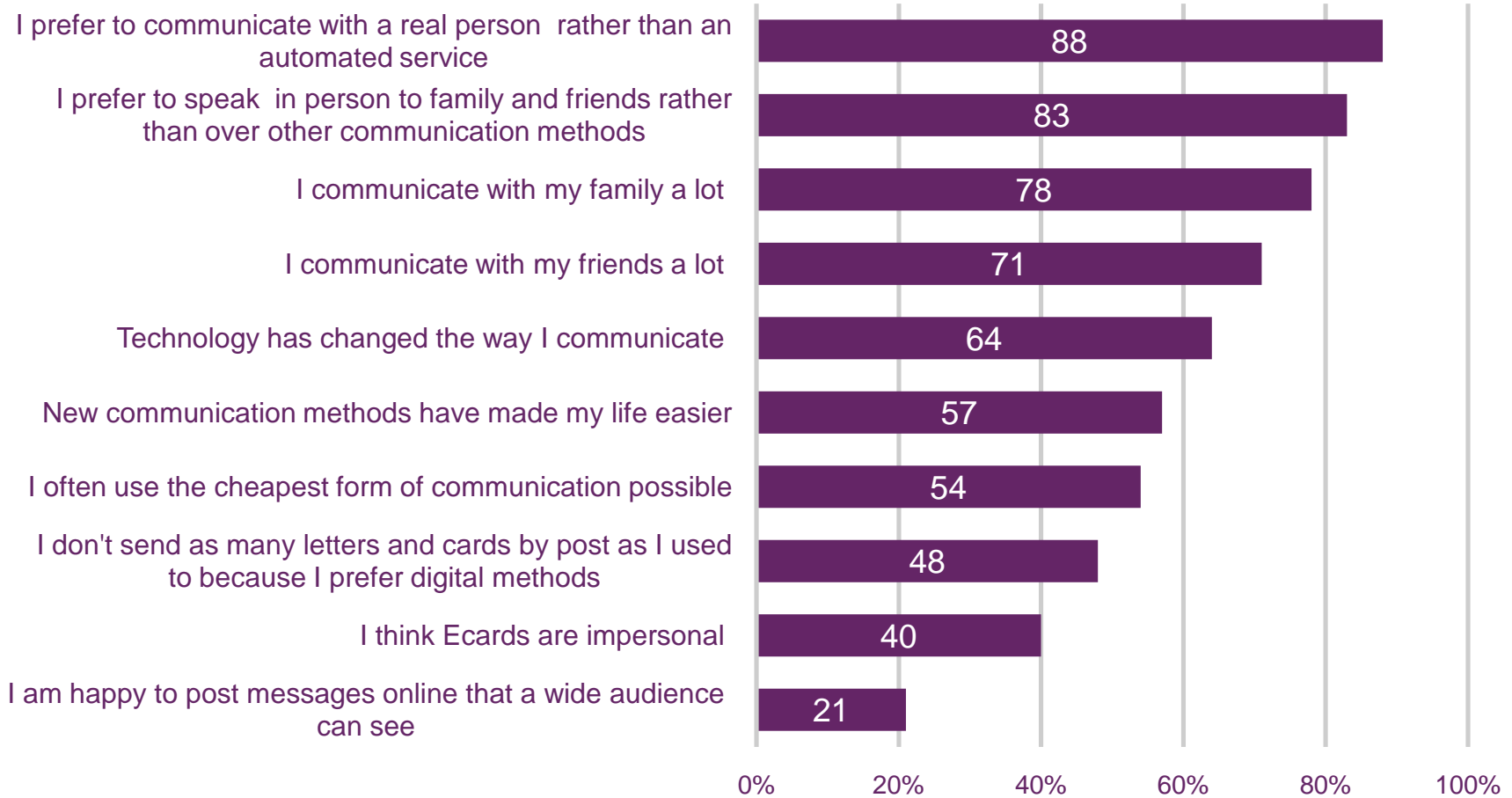
Source: Ofcom research, 2012

Base: UK adults aged 16+, who communicate with businesses, n = 701.

Note: Other mentions by 3% or less included text messages, social networking, VoIP calls.

# Figure 1.28

## Agreement with attitudes towards communication methods



Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5

Source: Ofcom research , 2012

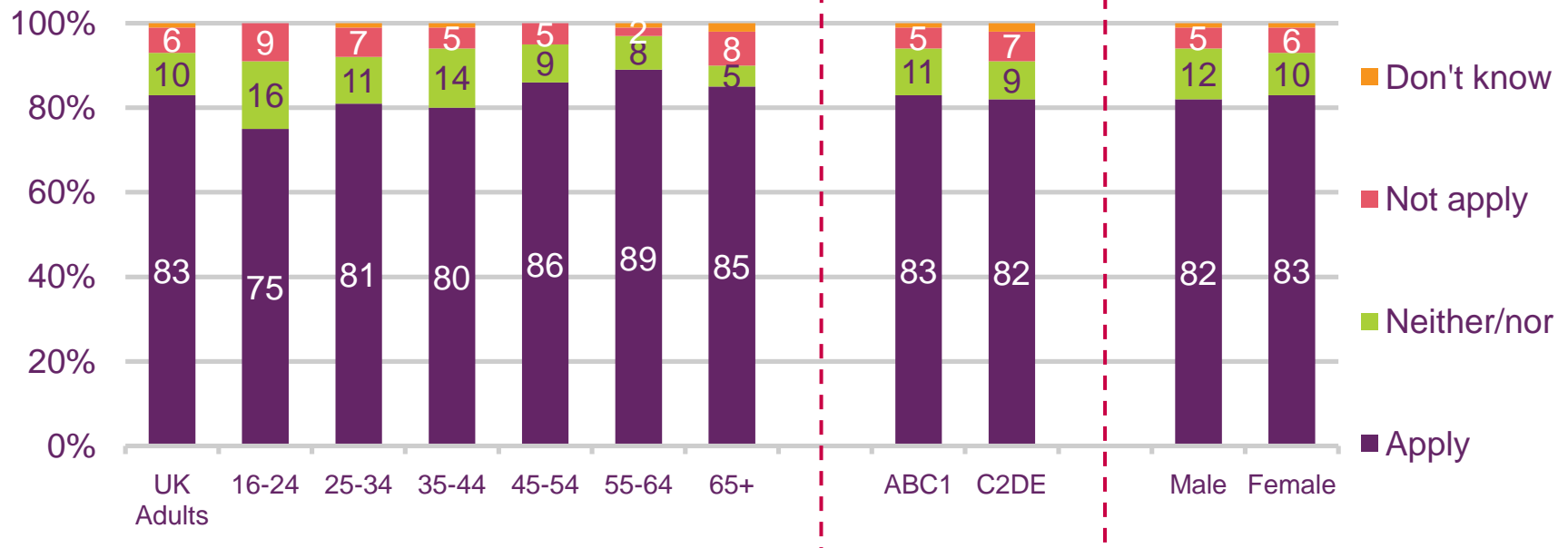
Base UK adults aged 16+ n = 2012

# Figure 1.29

## Preference for face-to-face communication with friends and family

*' I prefer to speak in person to friends and family rather than via other communication methods'*

By age, social grade and gender



Source: Ofcom research , 2012

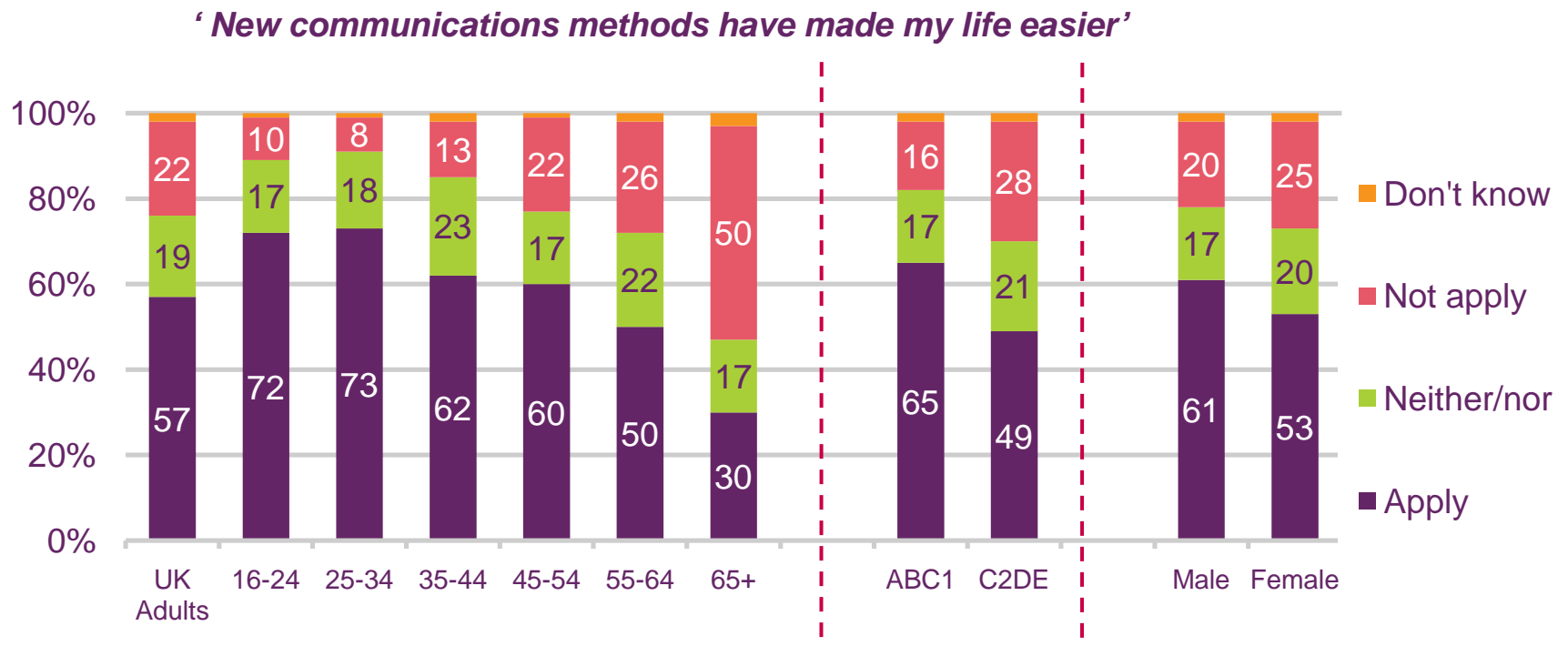
Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

Base: UK adults aged 16+ n = 2012

# Figure 1.30

## Views on whether new communications methods have made life easier

By age, social grade and gender



Source: Ofcom research , 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5  
 Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

Base: UK adults aged 16+ n = 2012



# The Generation Gap

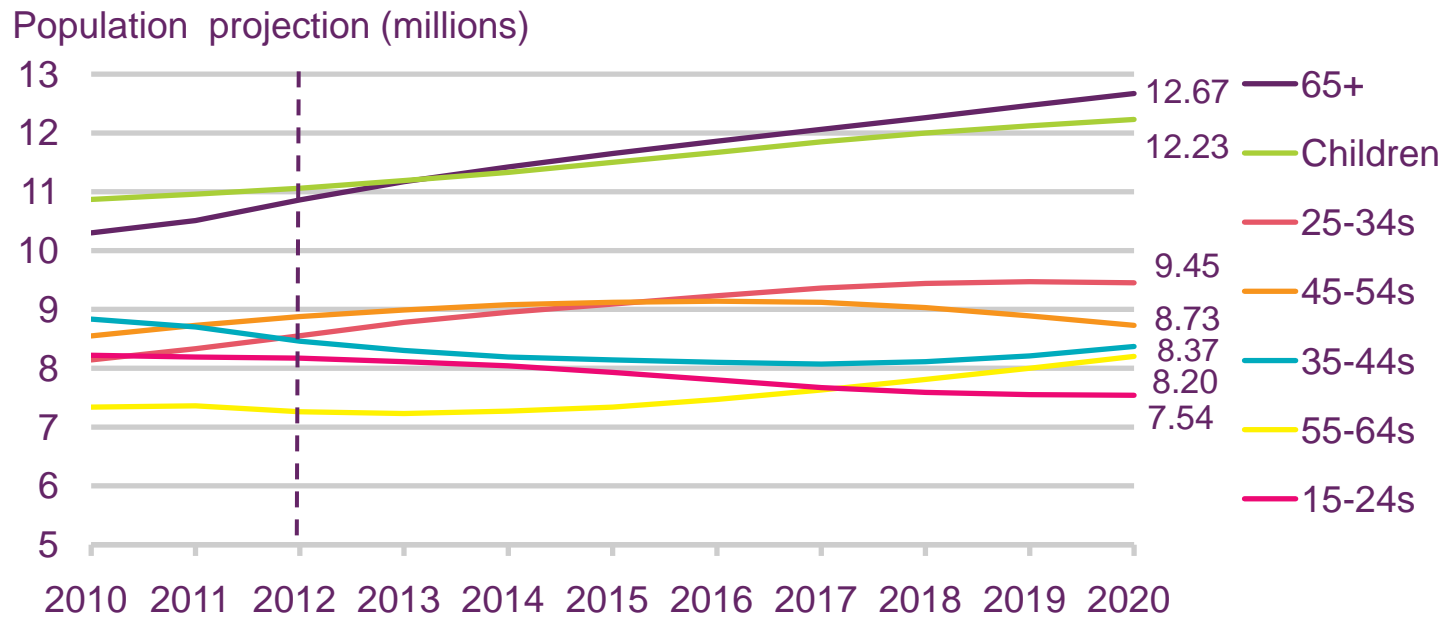
CHARTS USED IN CMR

Charlotte Mountjoy



# Figure 1.31

## UK population predictions by age group 2010-2020



Source: ONS 2010-based National Population Projections Published 26 October 2011

## Figure 1.32

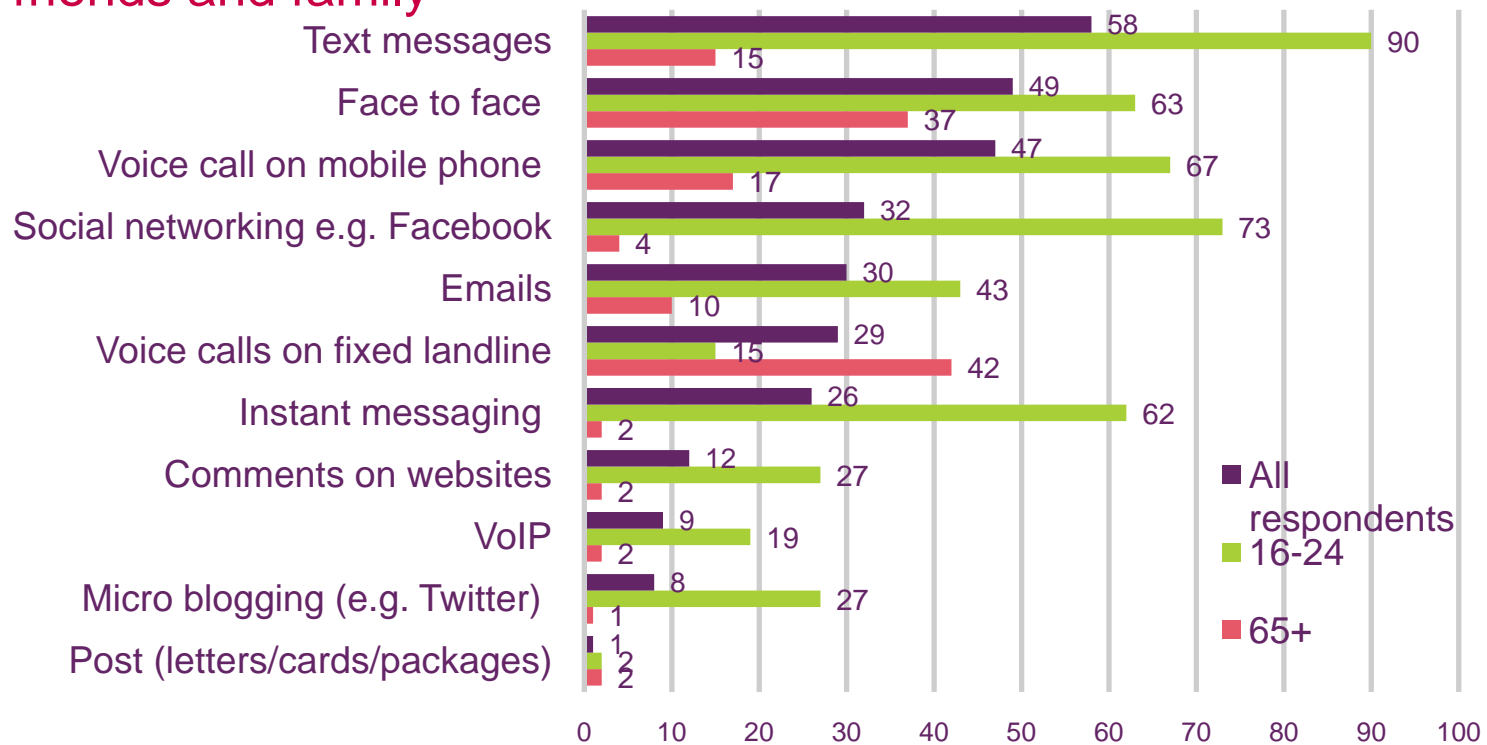
Take-up of internet, digital video recorders, and mobile phones by age

	Internet		DVR		Mobile	
	2005	2012	2005	2012	2005	2012
<b>All Adults</b>	54%	80%	11%	47%	80%	92%
<b>16-24</b>	60%	90%	19%	45%	92%	98%
<b>25-34</b>	62%	90%	10%	51%	91%	98%
<b>35-44</b>	71%	91%	16%	55%	91%	97%
<b>45-54</b>	70%	85%	15%	52%	84%	97%
<b>55-64</b>	59%	75%	7%	47%	75%	91%
<b>65+</b>	24%	46%	4%	31%	47%	68%

Source: Internet and Mobile phone, Ofcom's Technology Tracker Q1 2012, 2005. DVR, Ofcom's Media Literacy Tracker Q1 2005 & Ofcom's Technology Tracker Q1 2012

# Figure 1.33

## Methods of communication used at least once a day to communicate with friends and family

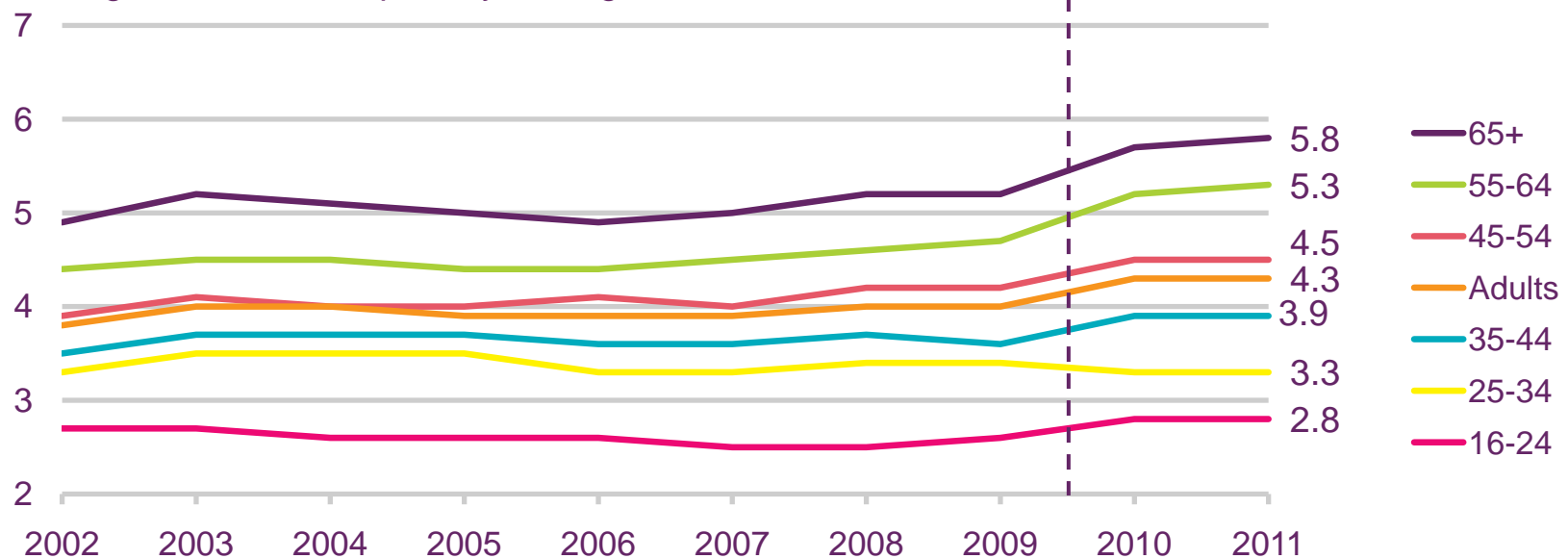


Source: Ofcom 's research, 2012 Q2a: How often do you use x to communicate with friends and family?  
 Base: UK adults who use communication methods aged 16+, n = 1980 Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

# Figure 1.34

Television consumption (hours per day) over time by age group

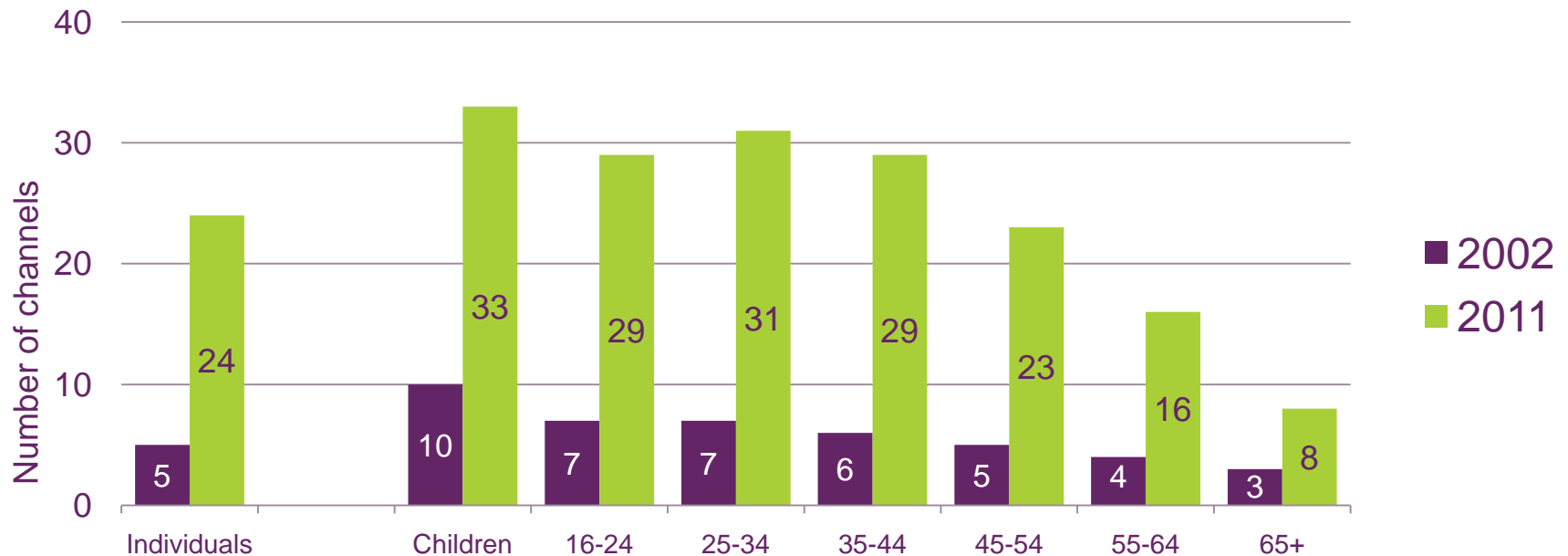
Average Hours viewed per day among adults



Source: BARB, all homes, average hours of daily viewing among adults. New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution

## Figure 1.35

Number of channels representing 75% of viewing age, 2002 versus 2011

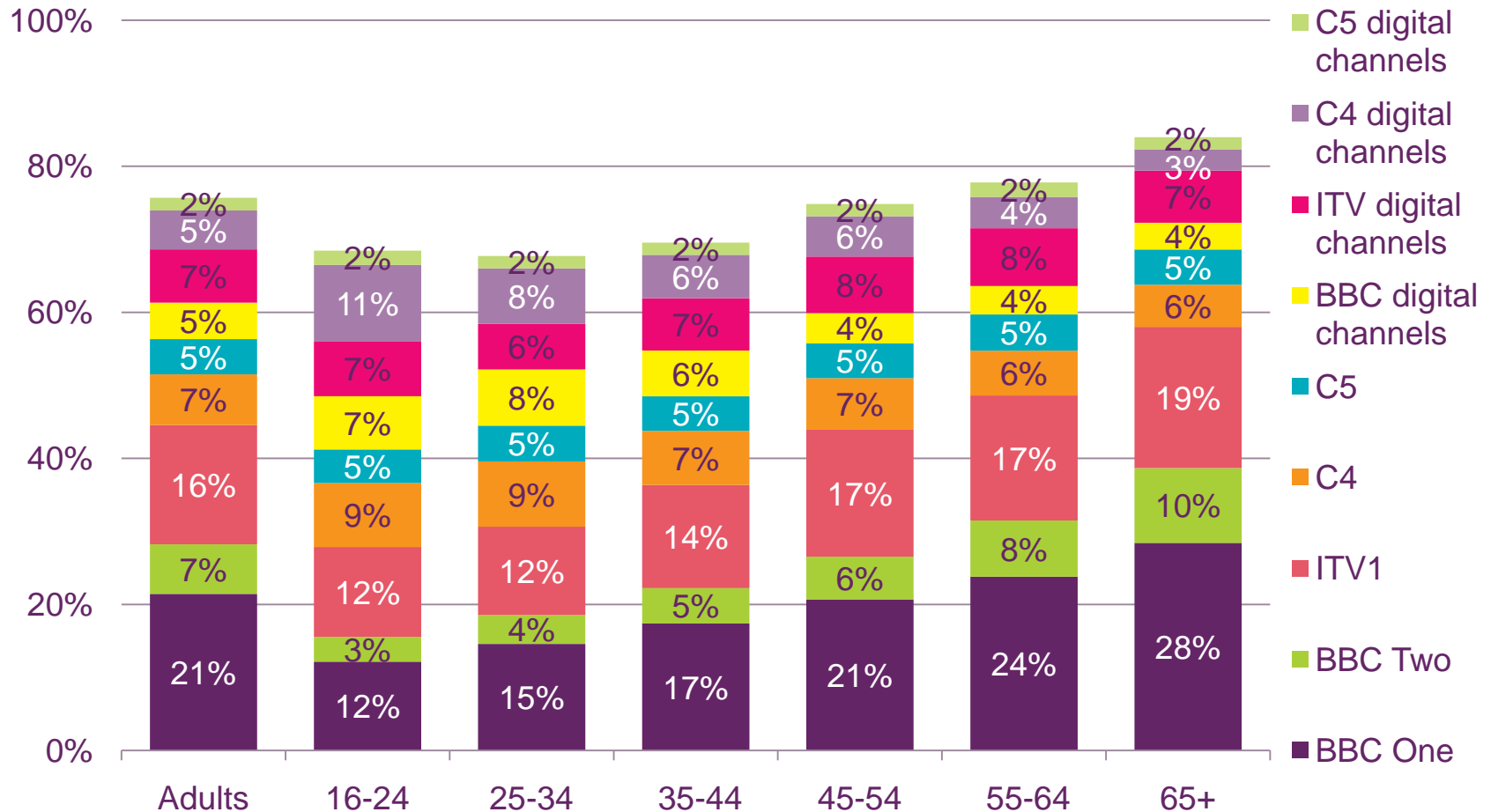


Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years.

Based on the number of channels representing 75% of each demographics viewing (channels ranked by channel share). New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be viewed with caution

## Figure 1.36

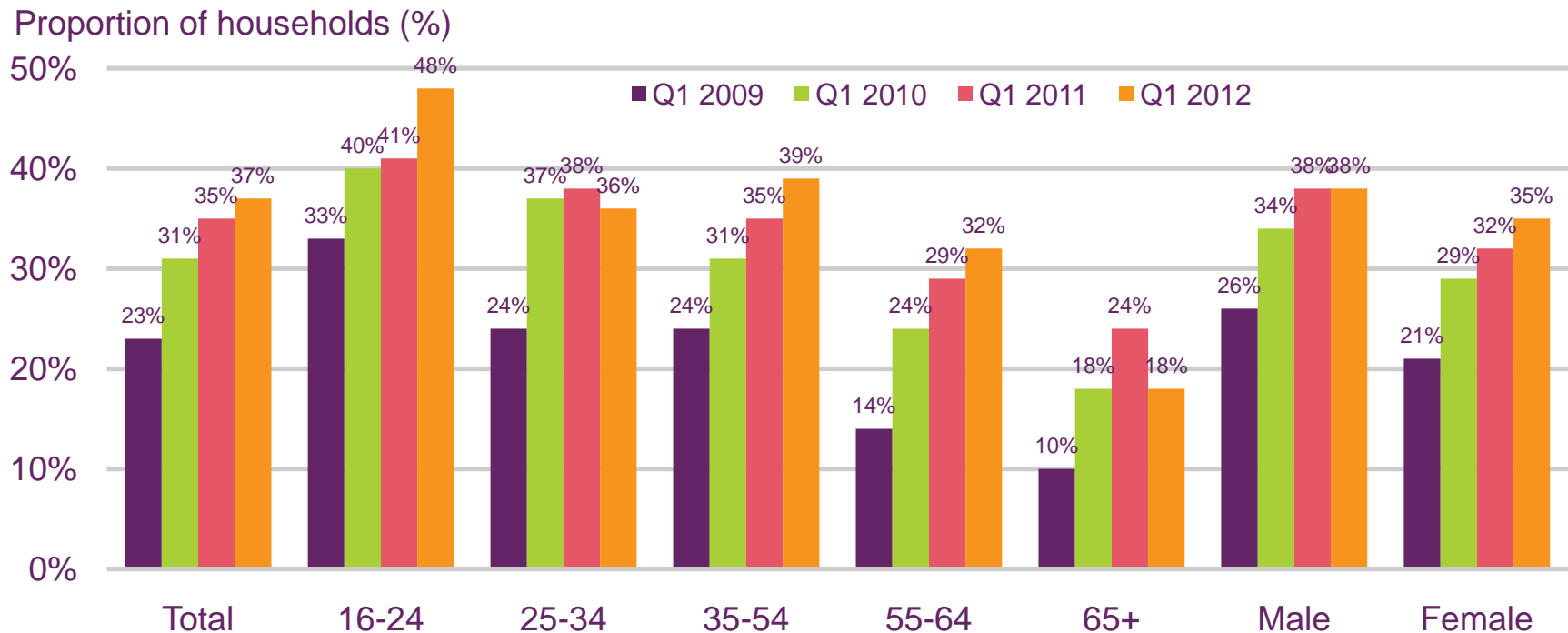
### Share of viewing for main PSB channels and their portfolio channels



Source: BARB Q1 2012 – all adults 16+

# Figure 1.37

## Proportion of adults with home internet who watch online catch-up TV



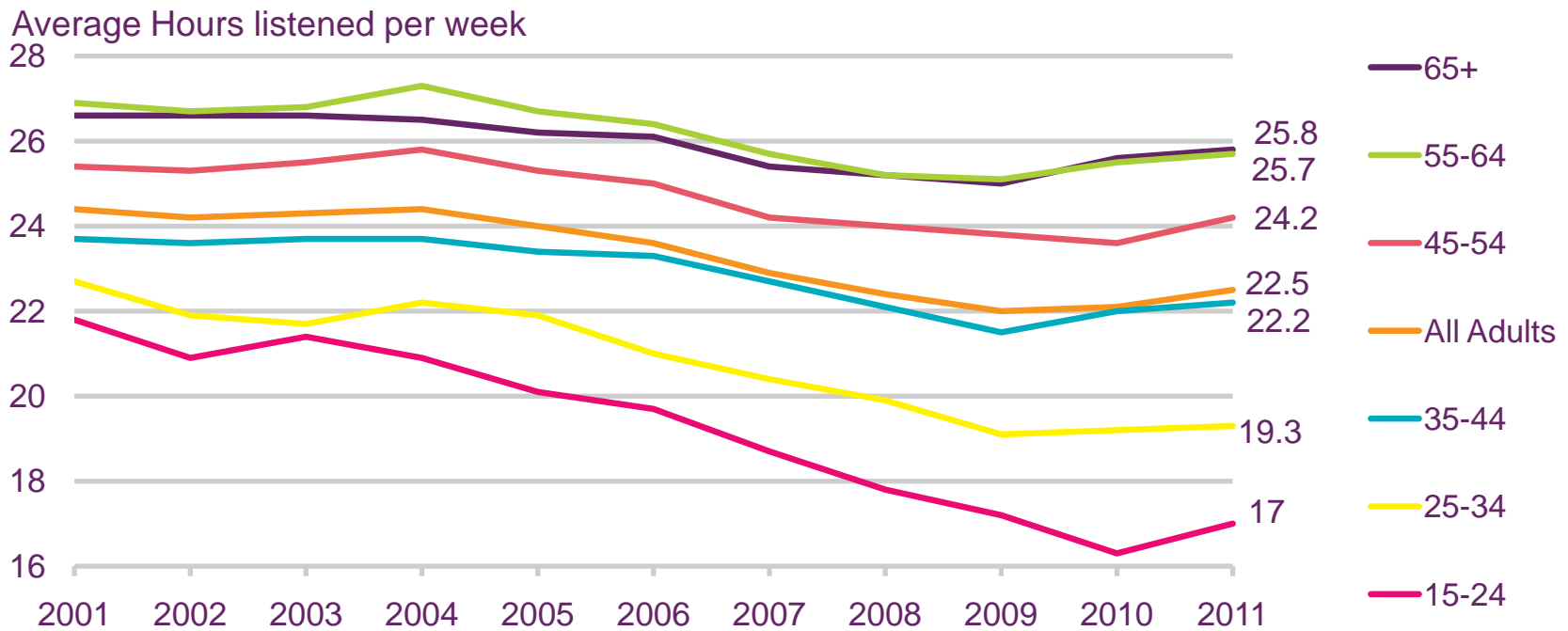
Source: Ofcom's research Q1 2012

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

Base: All adults who have the internet at home (n=2823 UK, 423 16-24, 524 25-34, 1113 35-54, 431 55-64, 330 65+, 1367 Male, 1456 Female)

# Figure 1.38

## Average hours listened per week by age from 2001 to 2011

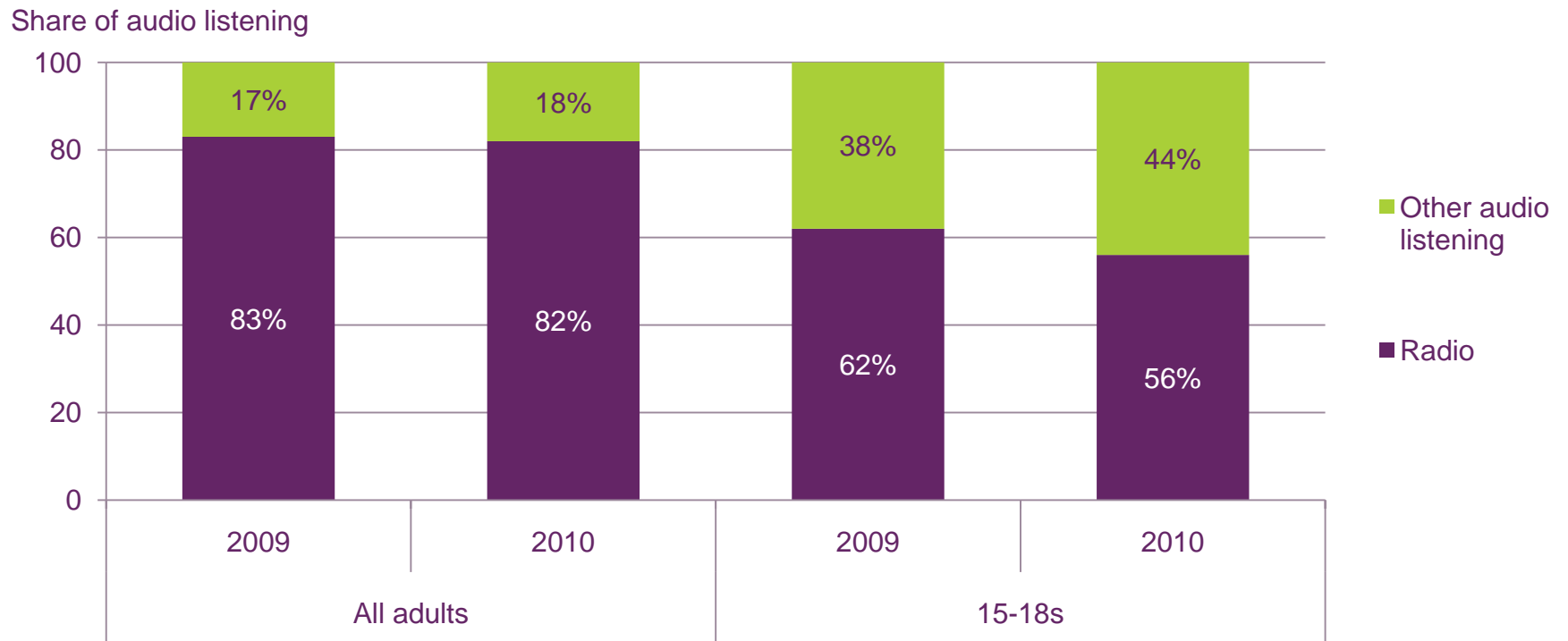


Source: RAJAR, weekly listening to all stations at a network level, and on the 12 months of each respective year ending Q4



# Figure: 1.39

## Radio's share of audio 2009-2010, by all adults and 15-18s



Source: BBC (A&M Audiences)/Brand Driver, Share of Ear research 2009, 2010

## Figure 1.40

Percentage of people listening to four or more stations by age 2002 versus 2011

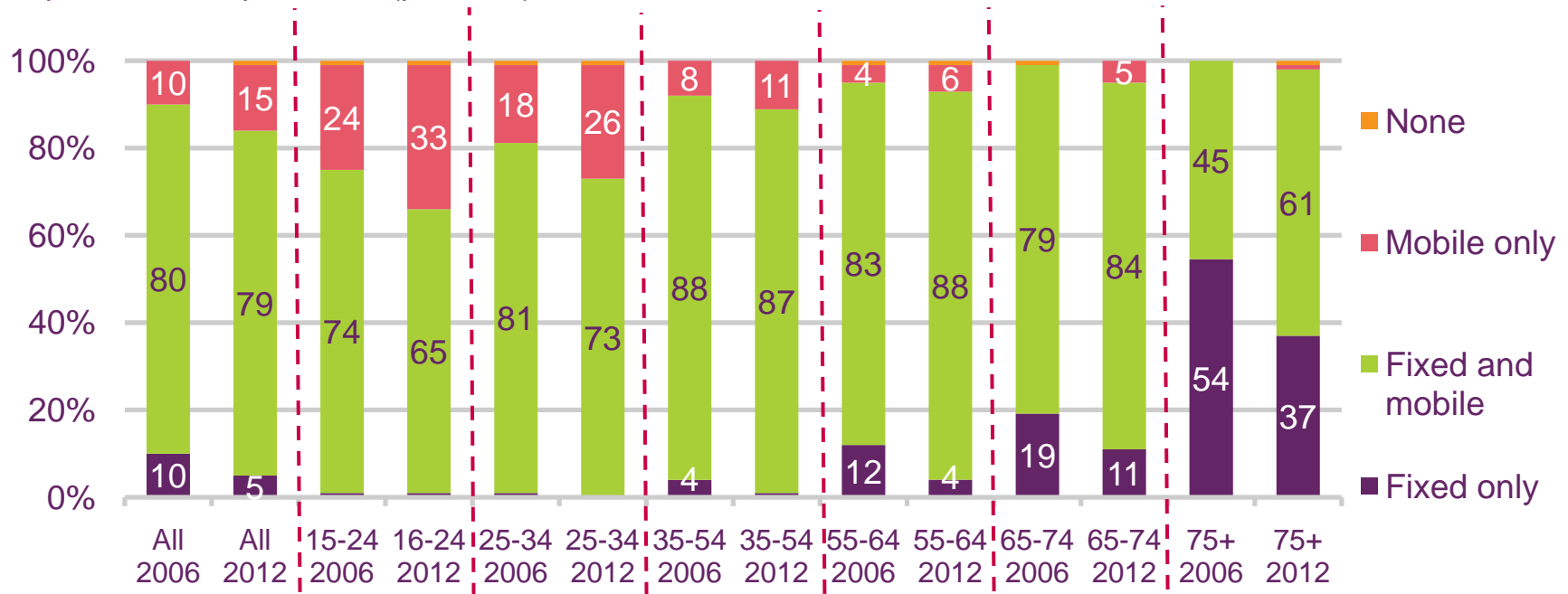
	Q1 2002	Q1 2011	% change
<b>Adults</b>	24.0%	28.0%	+16.7%
<b>15-24</b>	34.0%	36.0%	+5.9%
<b>25-34</b>	24.0%	31.5%	+31.3%
<b>35-44</b>	24.5%	30.0%	+22.4%
<b>45-54</b>	23.3%	30.0%	+28.8%
<b>55-64</b>	20.5%	25.6%	+25%
<b>65+</b>	15.0%	17.5%	+16.7%

Source: RAJAR, 3 month data number of stations listened to Q1 2002 and Q1 2011

## Figure 1.41

### Household penetration of fixed and mobile telephony, by age

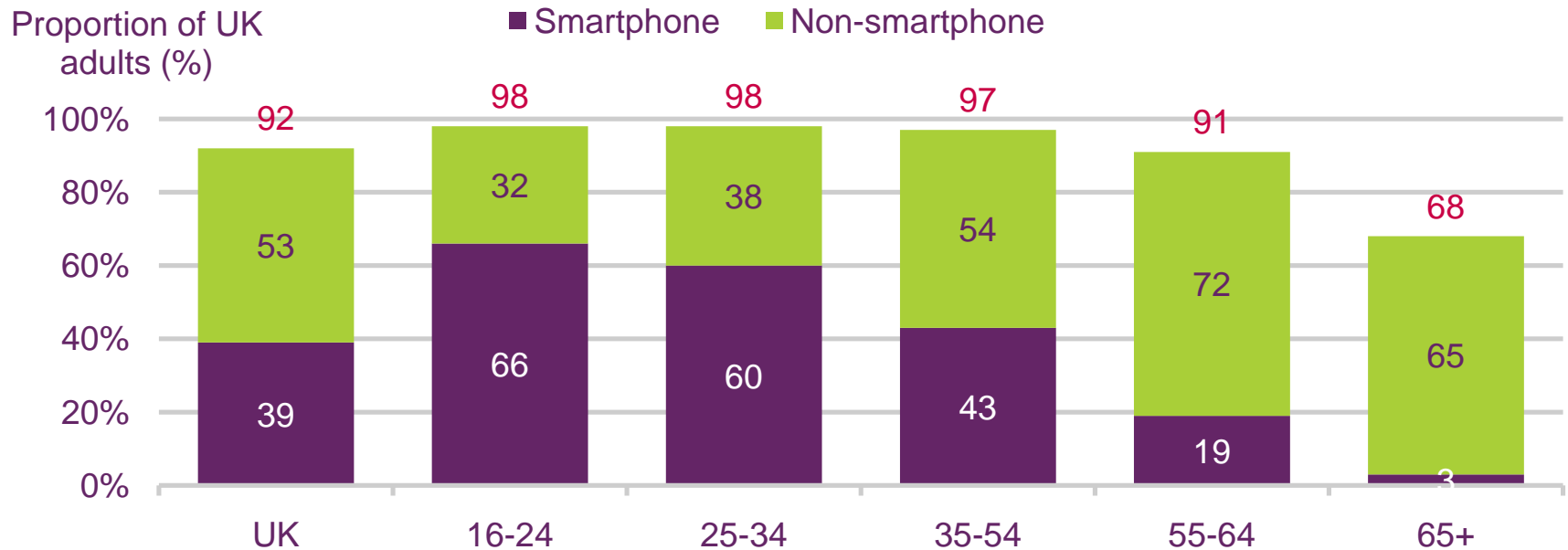
Proportion of respondents (per cent)



Source: Ofcom 's Technology Tracker Q1 2012, Ofcom's Residential Tracker Q1 2006

# Figure 1.42

## Smartphone take-up by age



Source: Ofcom's Technology tracker, Jan/Feb 2012

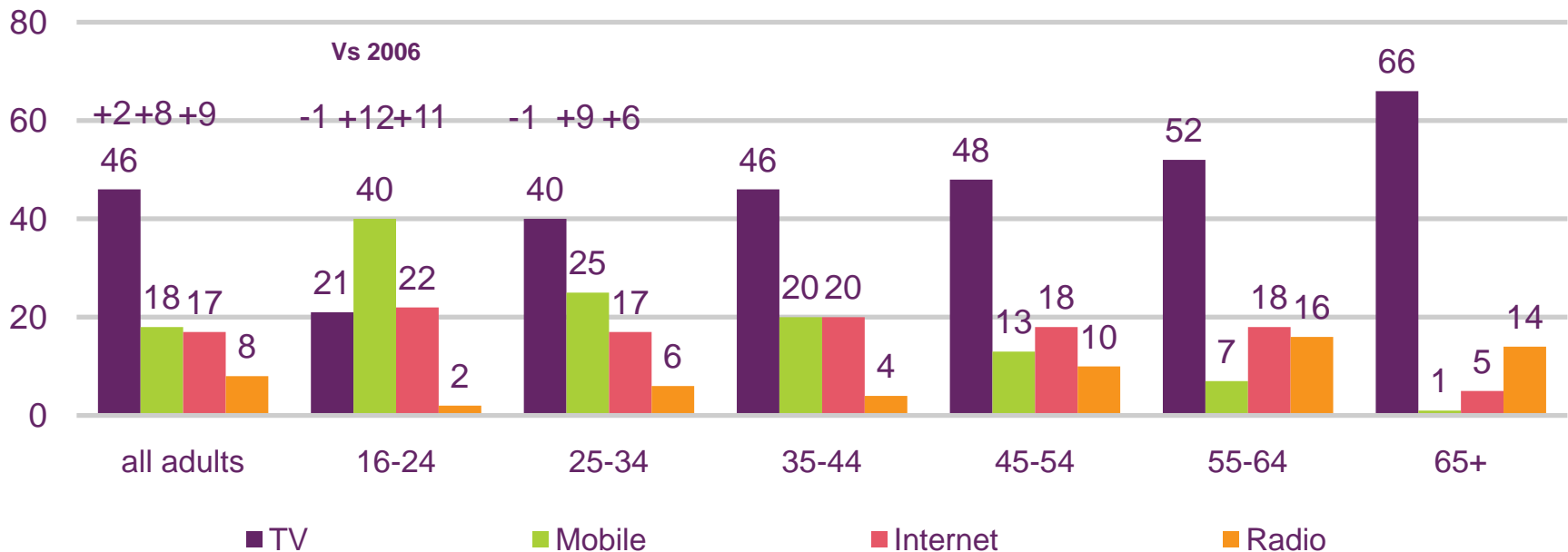
QD2. Do you personally use a mobile phones? /QD4 Do you personally use a smartphone?

Base: Total UK Adults aged 16+ (n = 3772 unweighted total)

# Figure 1.43

## Media activity missed the most in 2011 by age

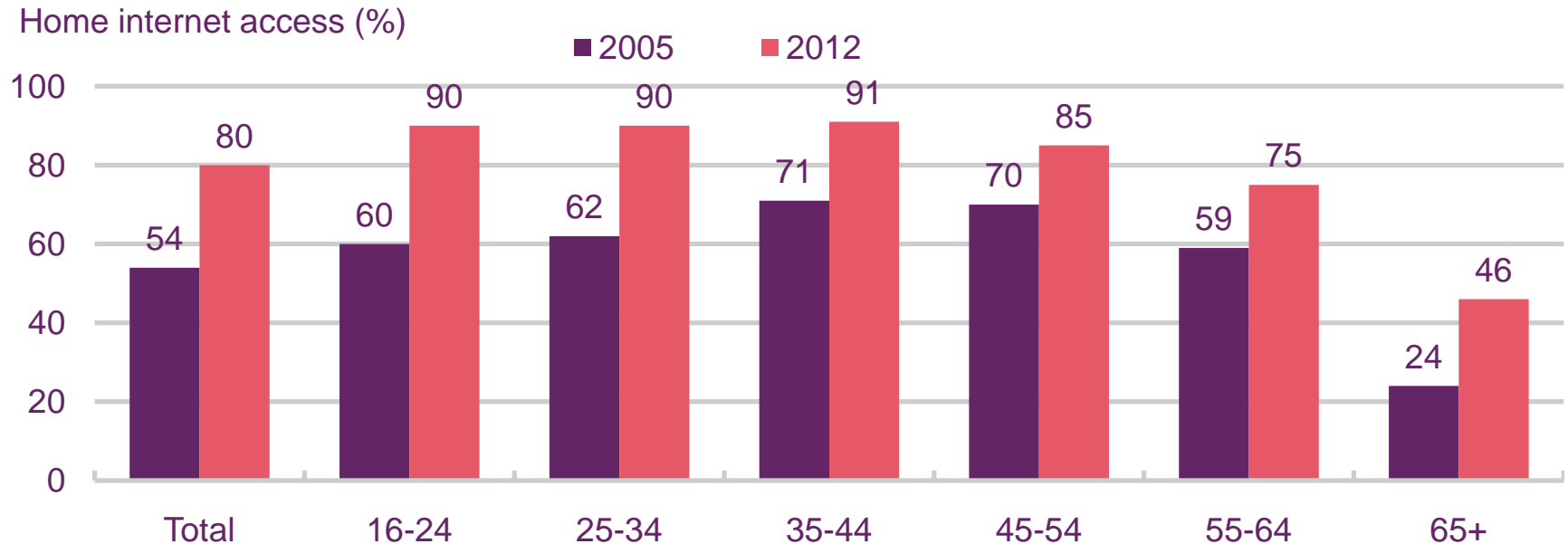
% All Adults



Source: Ofcom Media Literacy 2011 and 2006 , Q Which of these activities would you miss most? (prompted responses)

## Figure 1.44

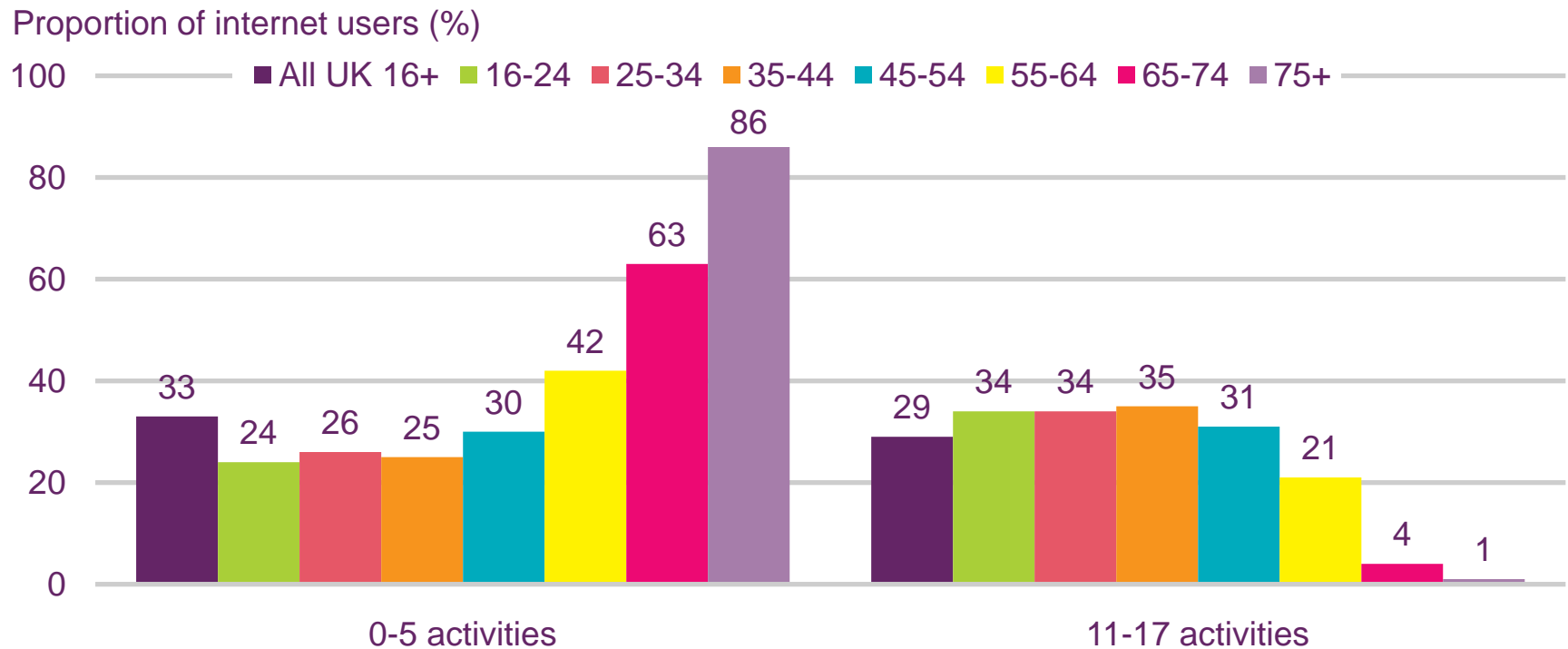
### Household internet access by age, 2005 vs 2012



Source: Ofcom's technology tracker, Q1 2012, Ofcom's Residential Tracker Q1 2005. Total internet access is based on fixed/mobile and mobile phones.

## Figure 1.45

### Breadth of internet use (number of activities undertaken) by age

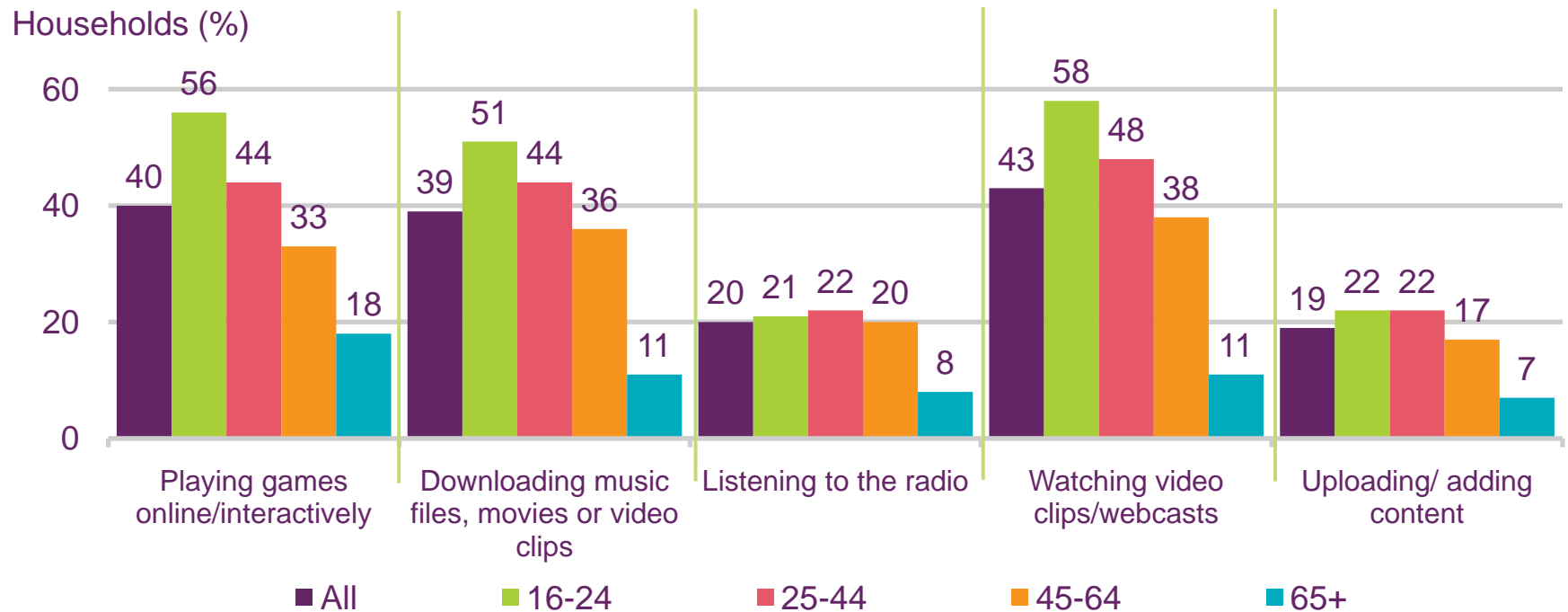


Source: Ofcom's Technology Tracker, Q1 2012



# Figure 1.46

## Household internet activities by age



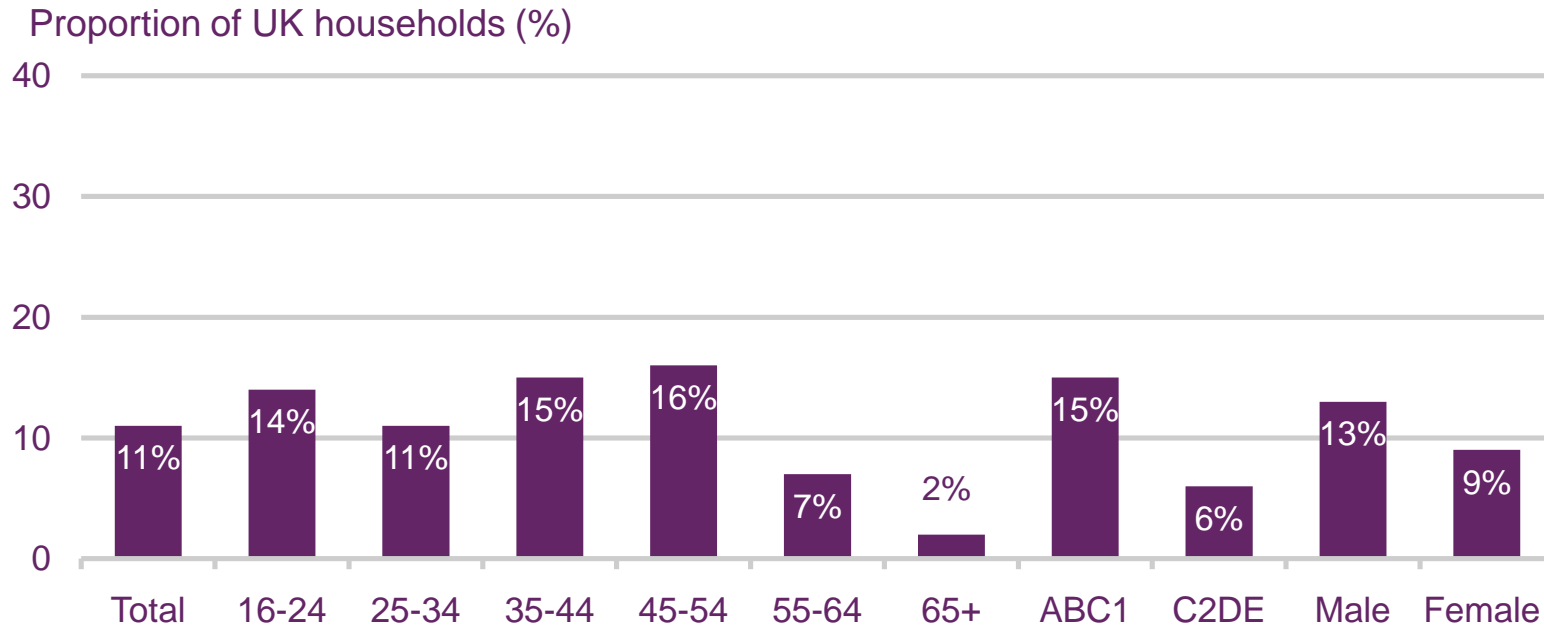
Source: Ofcom research, Q1 2012 Base: All adults who have the internet at home (n= 2823). QE5A: Which, if any, of these do you or members of your household use the internet for while at home?

# The fourth screen

March 2012

## Figure 1.47

### Take-up of tablet computers by age, SEG and gender

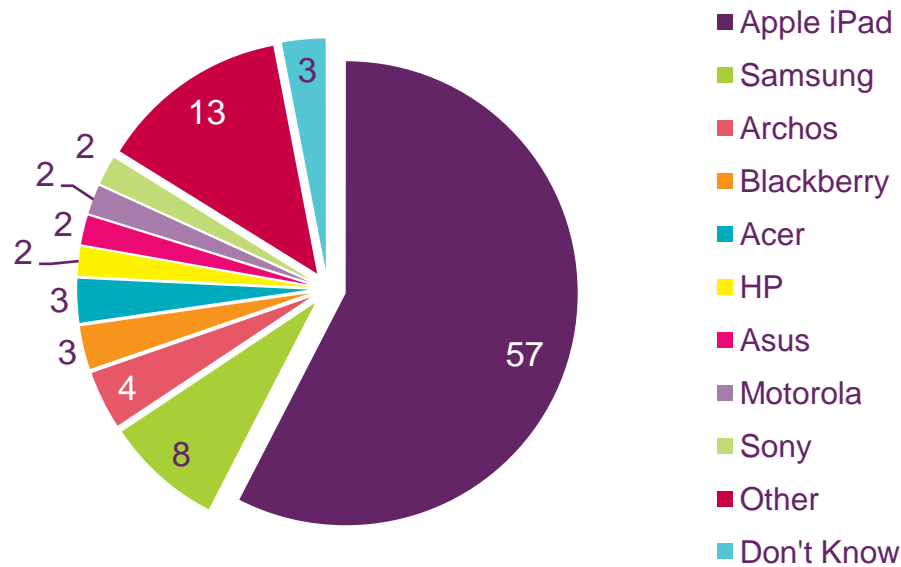


Source: Ofcom Technology Tracker 2012

Base: 2012:3772

# Figure 1.48

## Claimed ownership of tablet brands



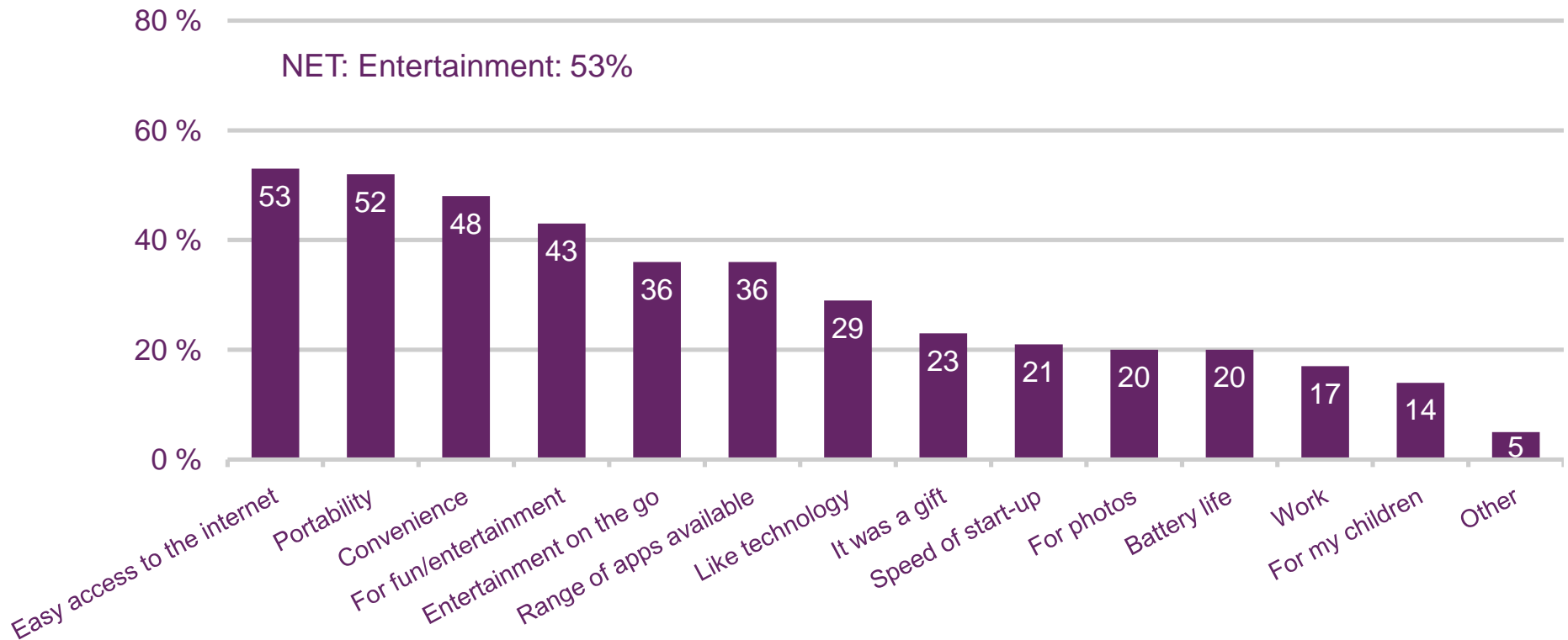
Source: Ofcom research

Q.B1 Firstly, what brand of tablet computer is it?

Base: All respondents with a tablet computer: 500

# Figure 1.49

## Reasons for purchasing a tablet



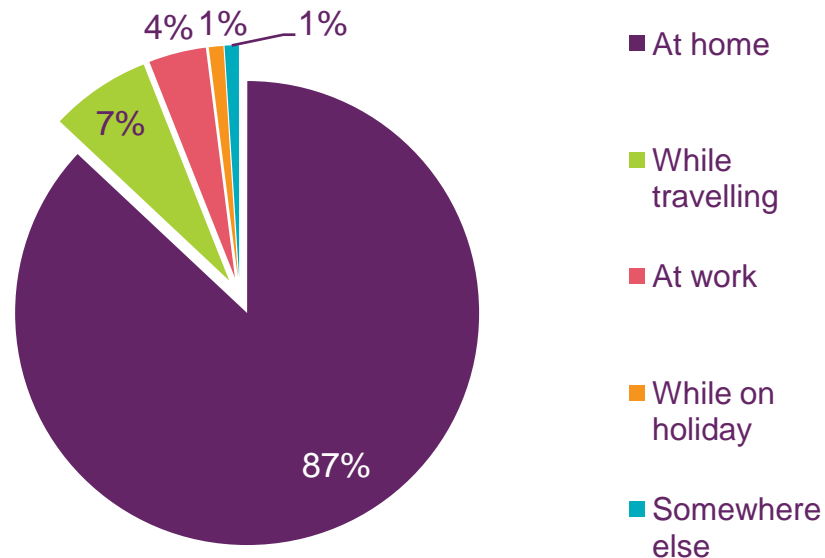
Source: Ofcom research

Q.B6 Why did you decide to buy a tablet computer?

Base: All respondents with a tablet: 500

## Figure 1.50

### Where tablets are used



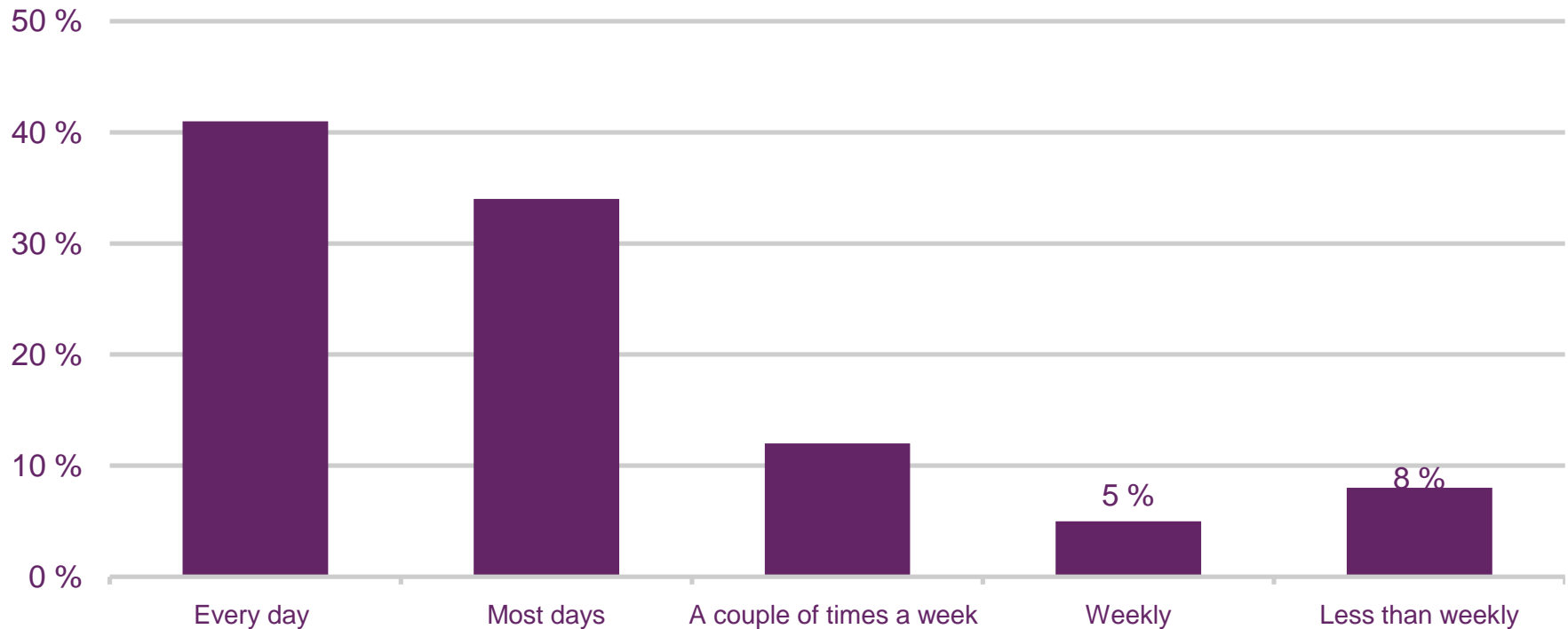
Source: Ofcom research

Q.B9 Where do you primarily use your tablet computer?

Base: All respondents with a tablet computer: 500

## Figure 1.51

### How often consumers use their tablet computer



Source: Ofcom research

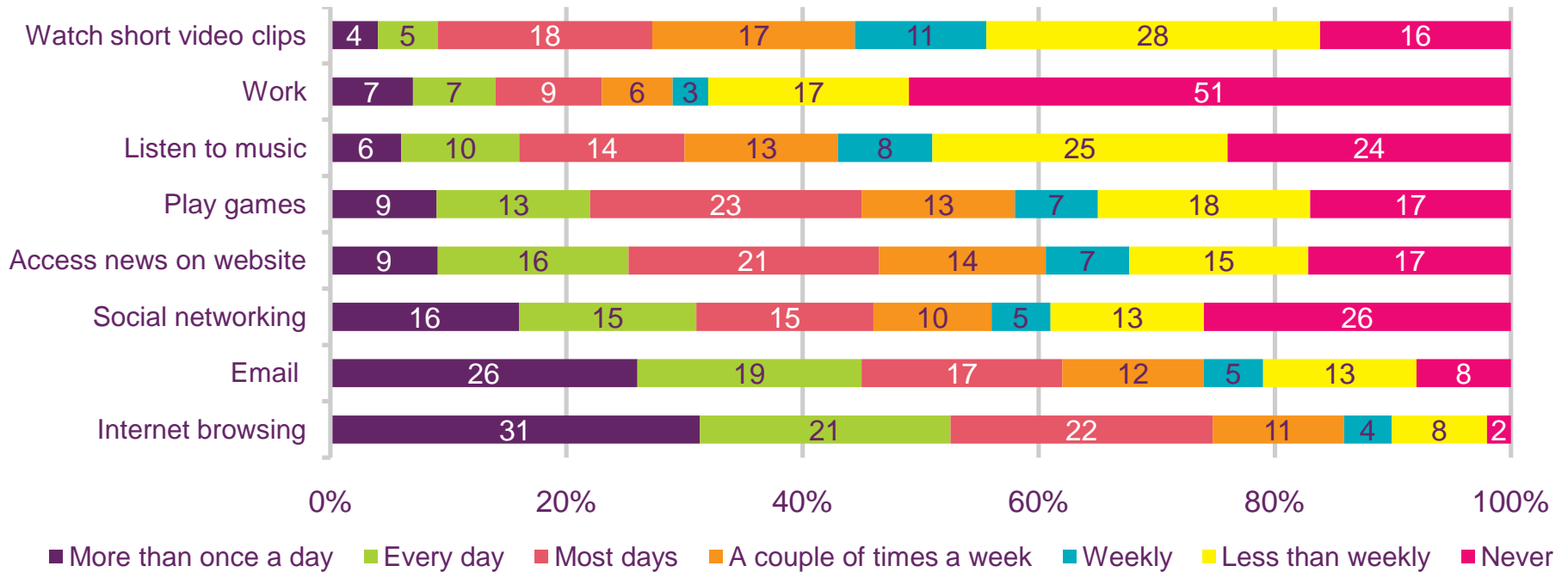
Q.B7 How often do you tend to use your tablet computer?

Base: All respondents with a tablet: 500



# Figure 1.52

## Frequency of activities using a tablet



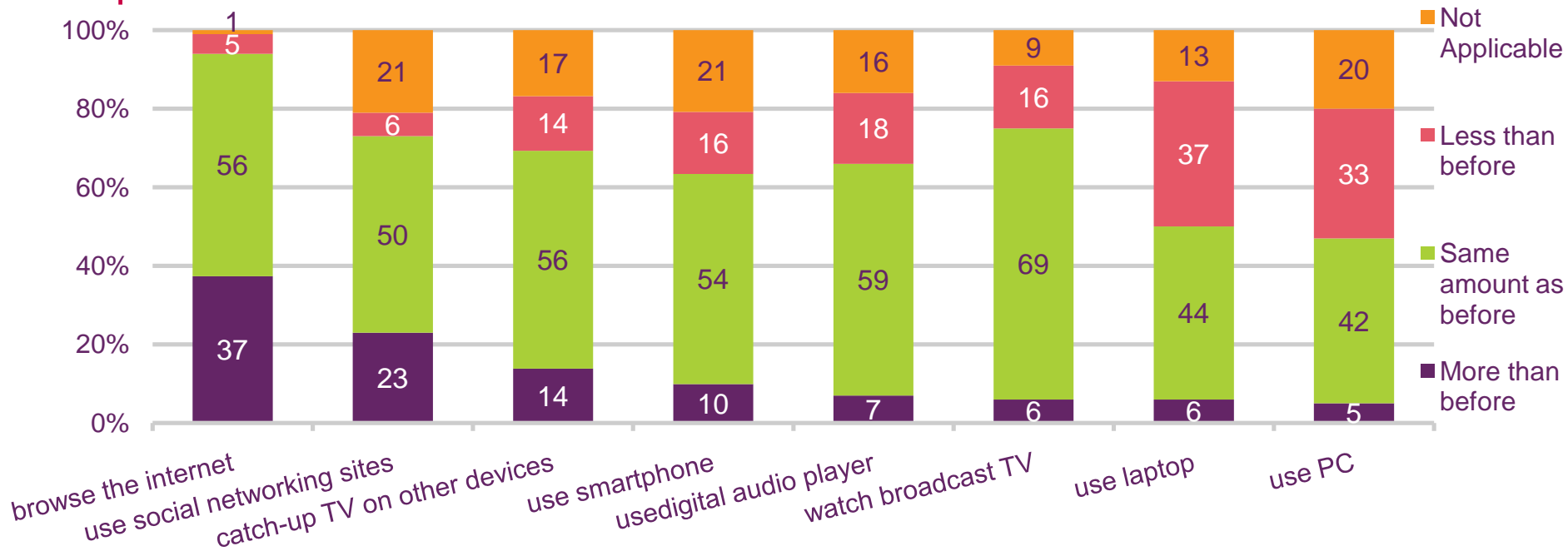
Source: Ofcom research

Q.B11 How often, if at all, do you use your tablet computer for each of the following?

Base: All respondents with a tablet: 500

# Figure 1.53

## Impact on behaviour



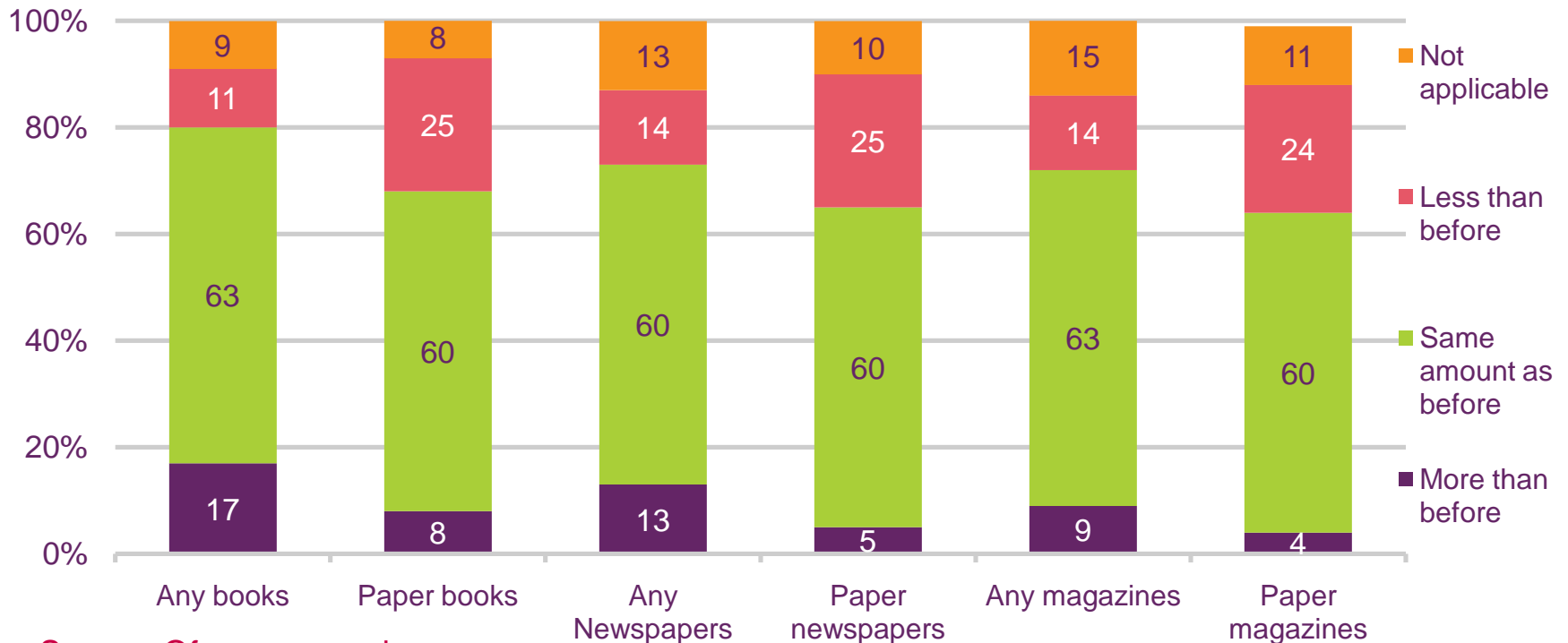
Source: Ofcom research

Q.B20 For each of the activities below can you tell us whether you are doing it more, less or the same amount since owning your tablet computer?

Base: All respondents with a tablet: 500

# Figure 1.54

## Impact on reading behaviour



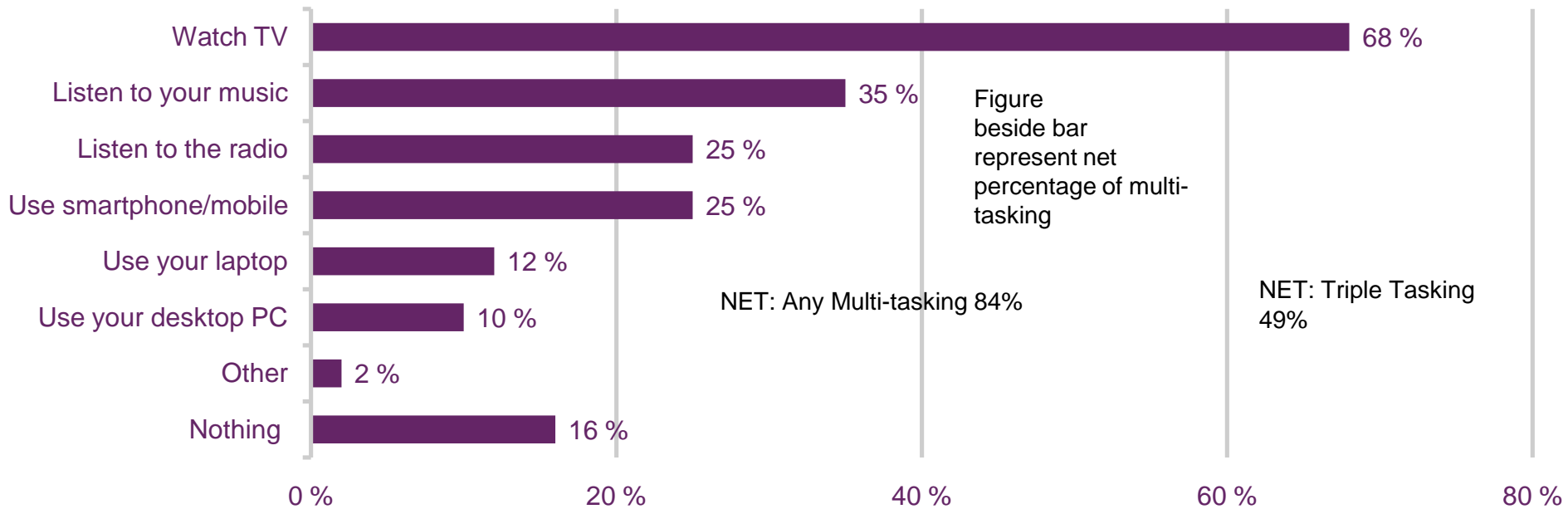
Source: Ofcom research

QB13/14 Since owning your tablet computer have you read books, magazines or newspapers more or less than before?/ We'd now like you to think specifically about paper based content - so since owning your tablet computer have you read books, magazines or newspapers more or less than before?

Base: All respondents with a tablet: 500

# Figure 1.55

## Multi-tasking while using a tablet



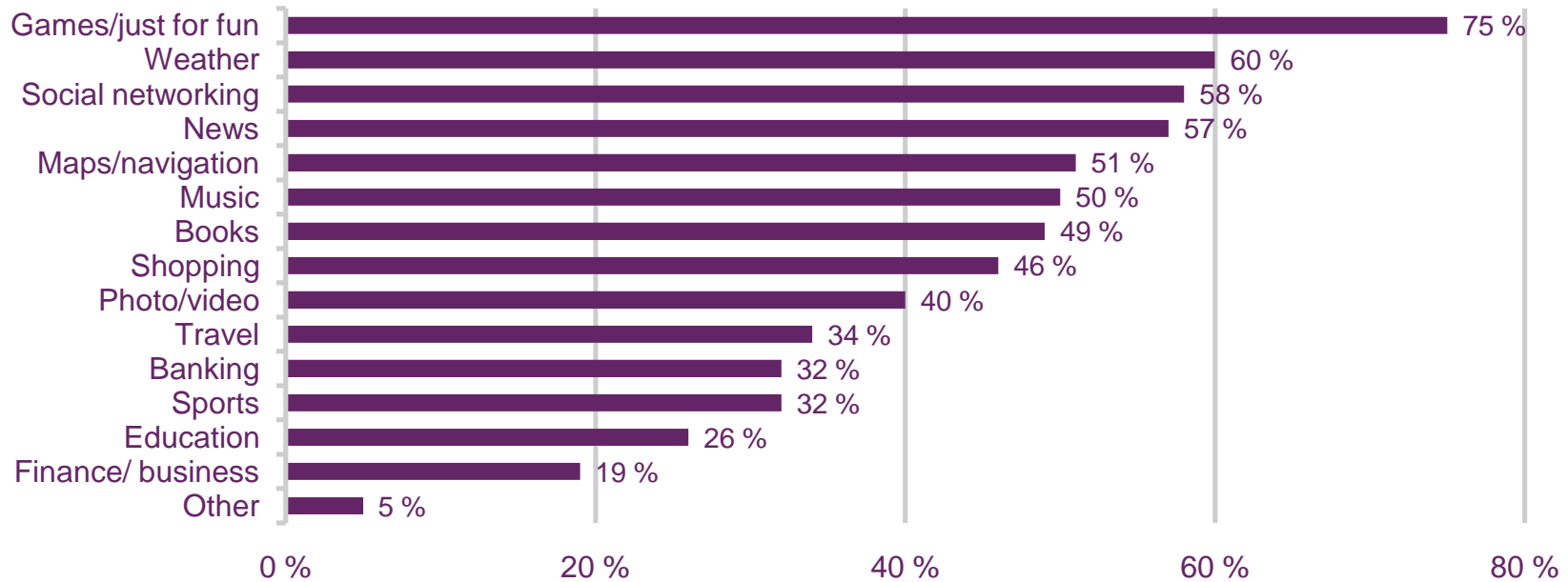
Source: Ofcom research

Q.B12 Some people multi-task while using their tablet computer. Which, if any, of the following things do you tend to do at the same time as using your tablet computer?

Base: All respondents with an tablet computer: 500

# Figure 1.56

## Types of apps downloaded onto a tablet



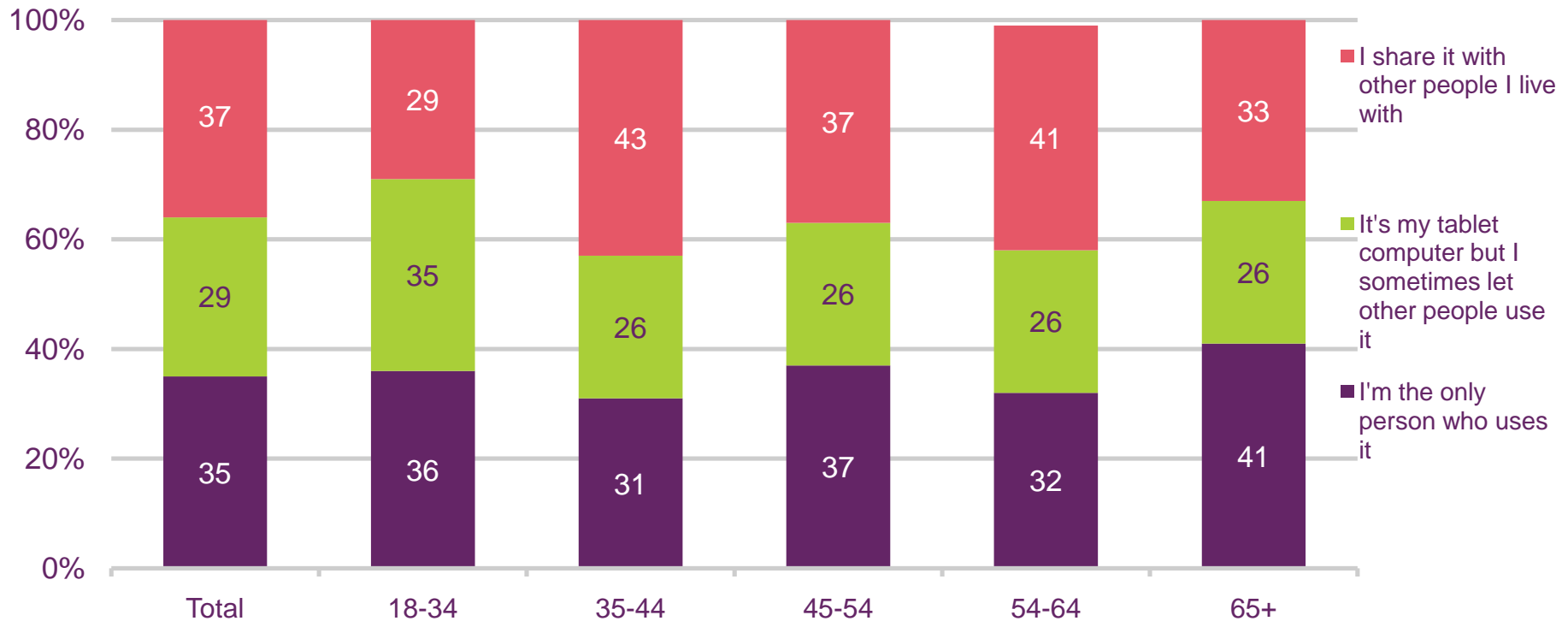
Source: Ofcom research

Q.B18: Which of the following types of apps have you downloaded?

Base: All respondents with apps on their tablet computer: 484

# Figure 1.57

## Sharing vs. personal device



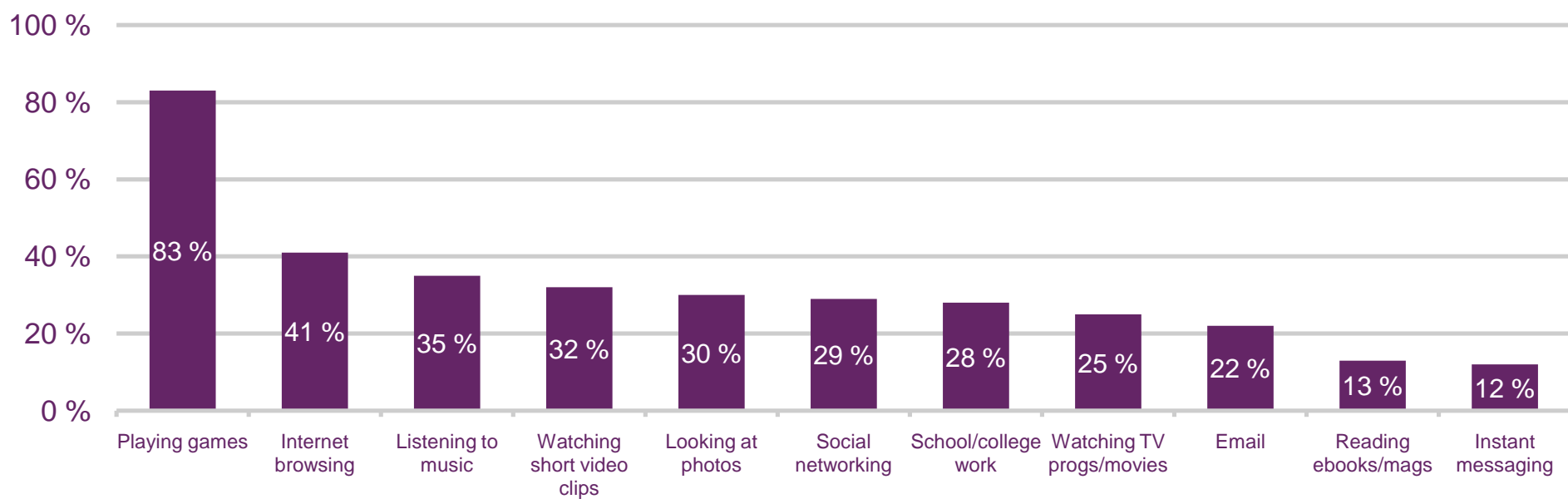
Source: Ofcom research

Q.B5 Which of these statements best describes who uses your tablet computer?

Base: All respondents with a tablet: 500

# Figure 1.58

## Tablet use among children



Source: Ofcom research

Q.B22 What do your children use your tablet computer for?

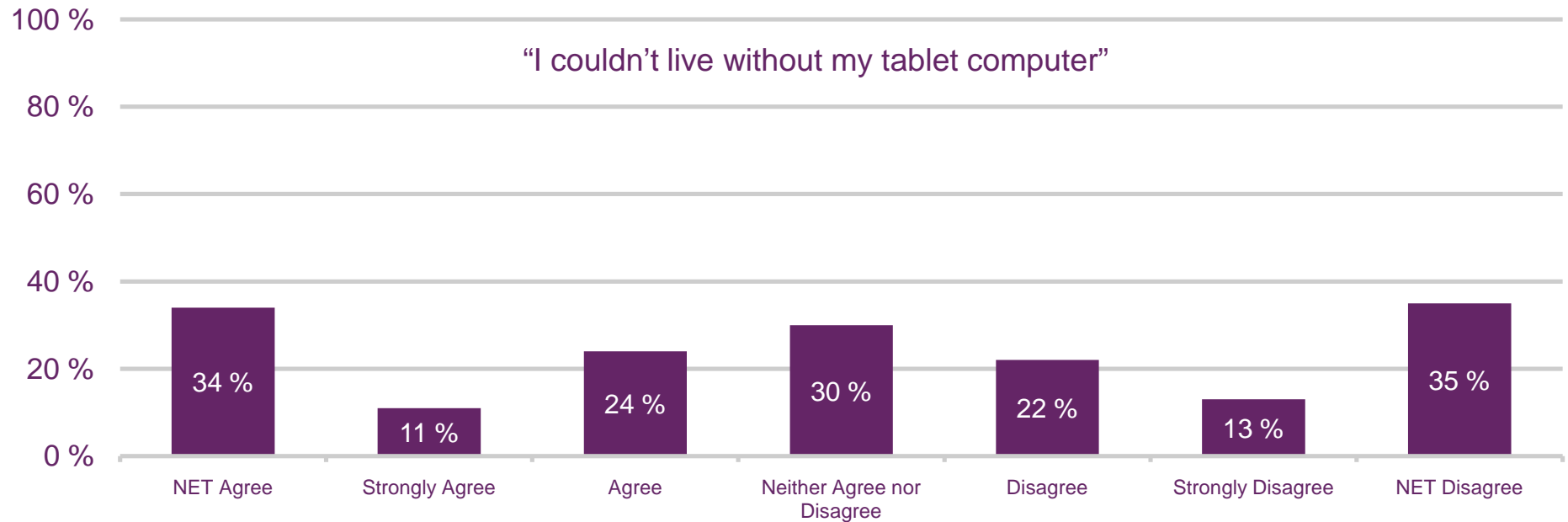
Base: All respondents with children aged under 16 who use their tablet computer: 170



# Figure 1.59

## Personal attachment to tablets

“I couldn't live without my tablet computer”



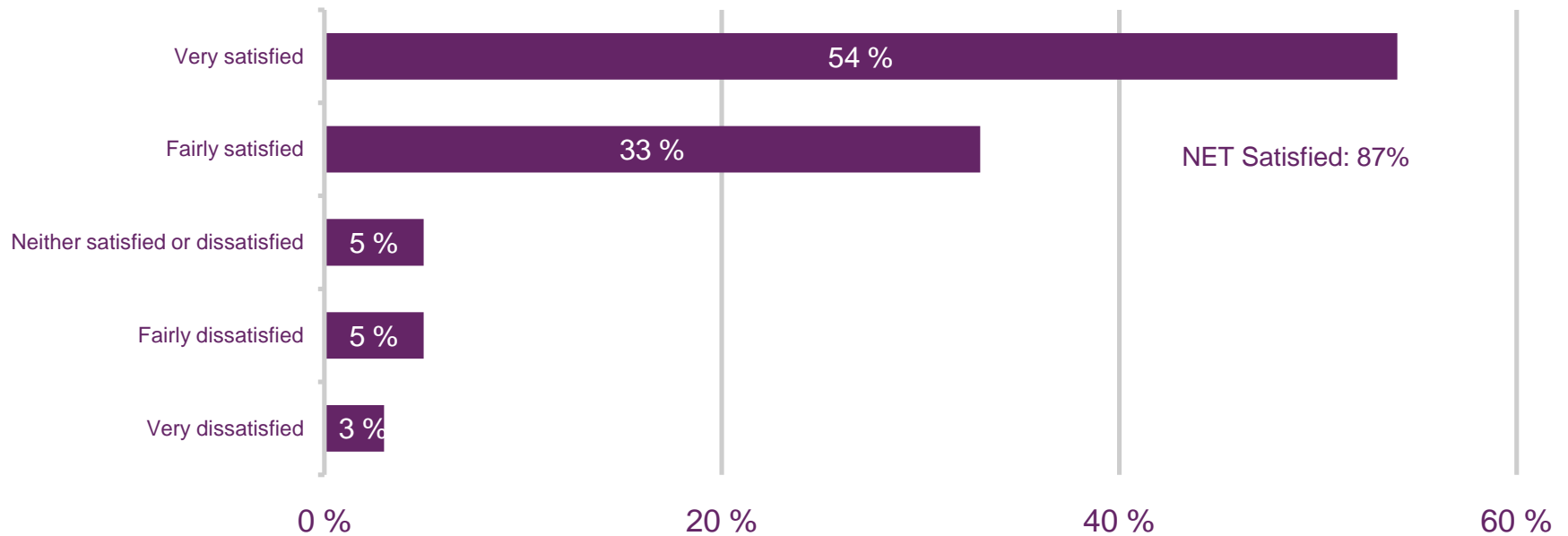
Source: Ofcom research

Q.B23 To what extent do you agree or disagree with the following statements?

Base: All respondents with a tablet: 500

# Figure 1.60

## Consumer tablet satisfaction



Source: Ofcom research

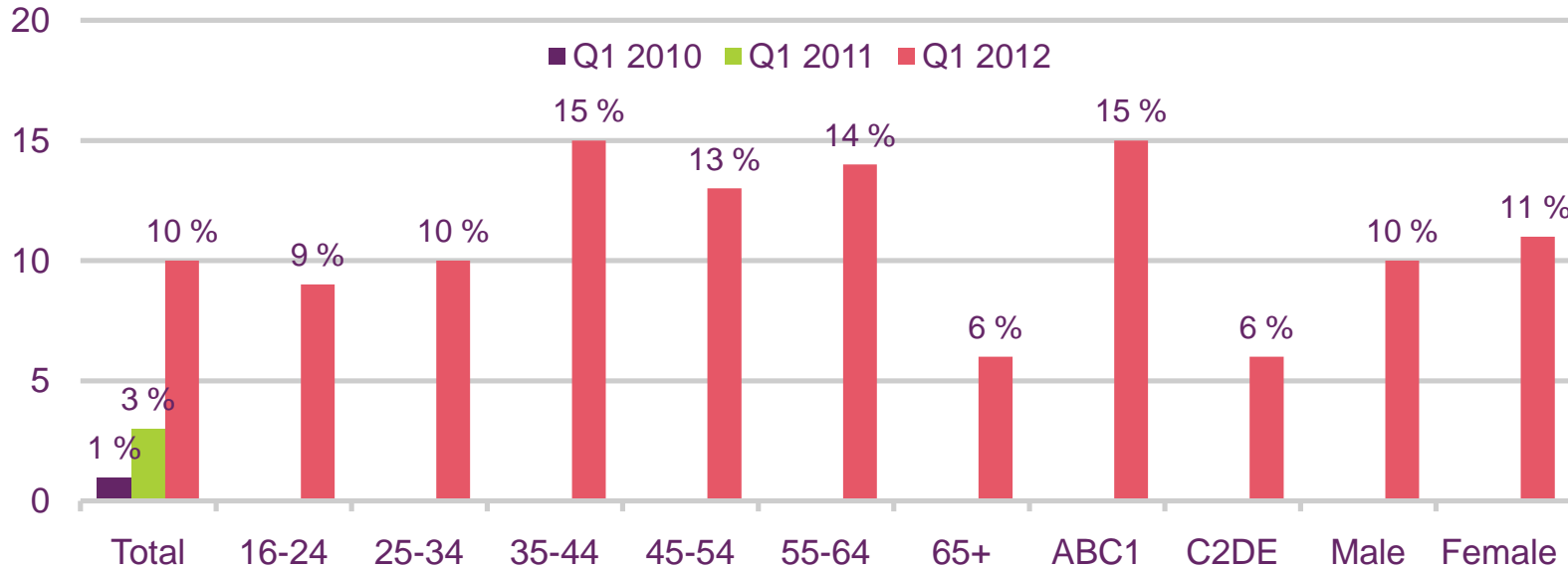
Q.B3 Taking all things into account, how satisfied or dissatisfied are you with your tablet computer?

Base: All respondents with a tablet: 500

# Figure 1.61

## Take-up of e-readers

Proportion of UK adults (%)

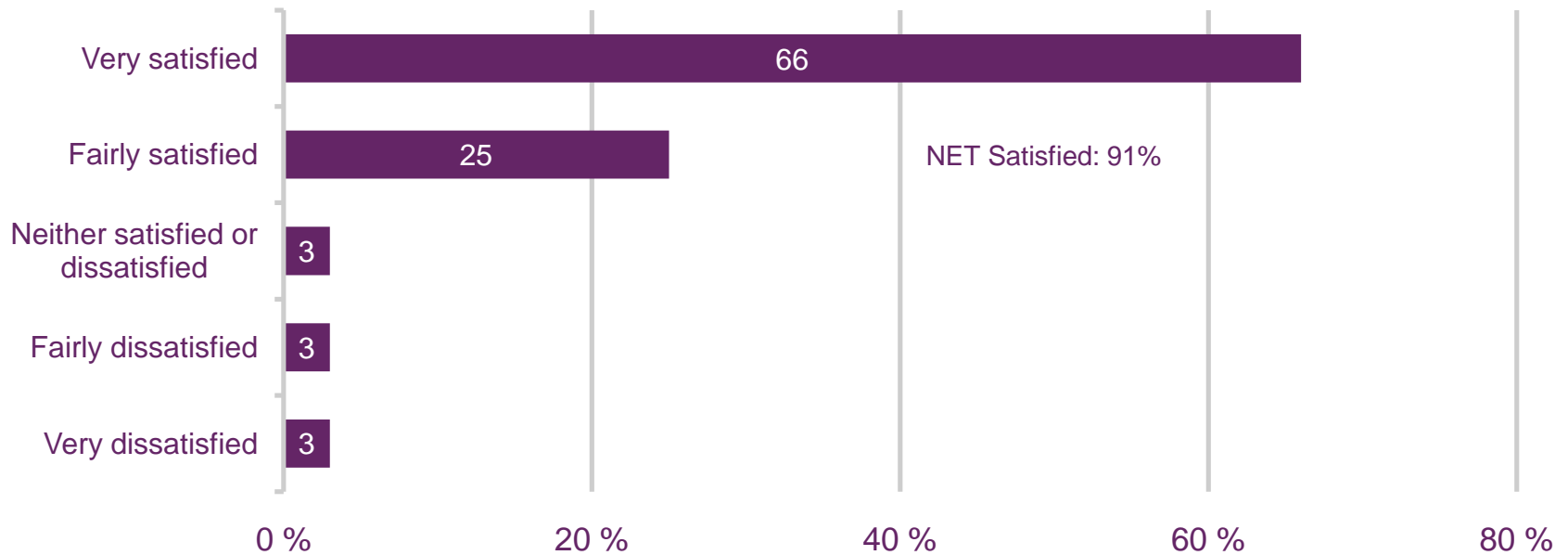


Source: Ofcom Technology Tracker 2010,2011, 2012

Base: 2010:9013, 2011: 3474, 2012:3772

## Figure 1.62

### Consumer e-reader satisfaction



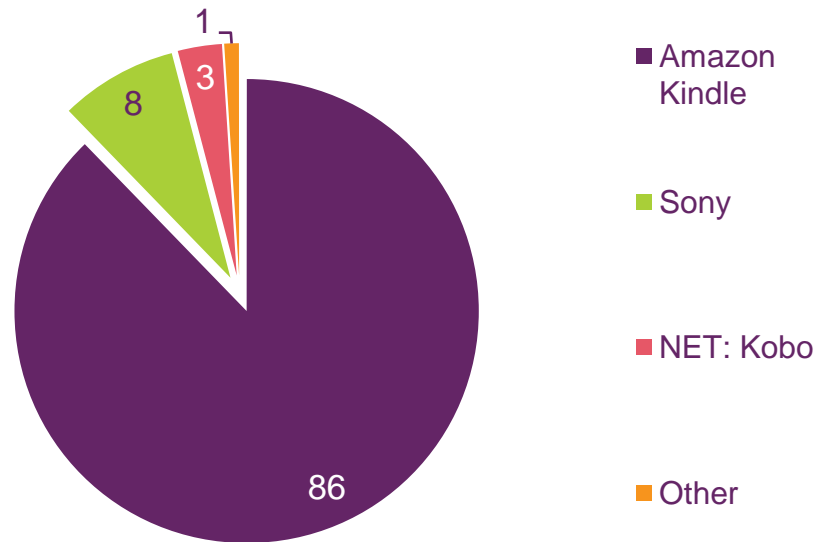
Source: Ofcom research

Q.C2 Taking all things into account, how satisfied or dissatisfied are you with your e-reader?

Base: All respondents with an e-reader: 500

## Figure 1.63

### Claimed ownership of e-reader brands



Source: Ofcom research

Q.C1 What brand of e-reader is it?

Base: All respondents with an e-reader: 500

# Figure 1.64

## Reasons why consumers decided to buy an e-reader



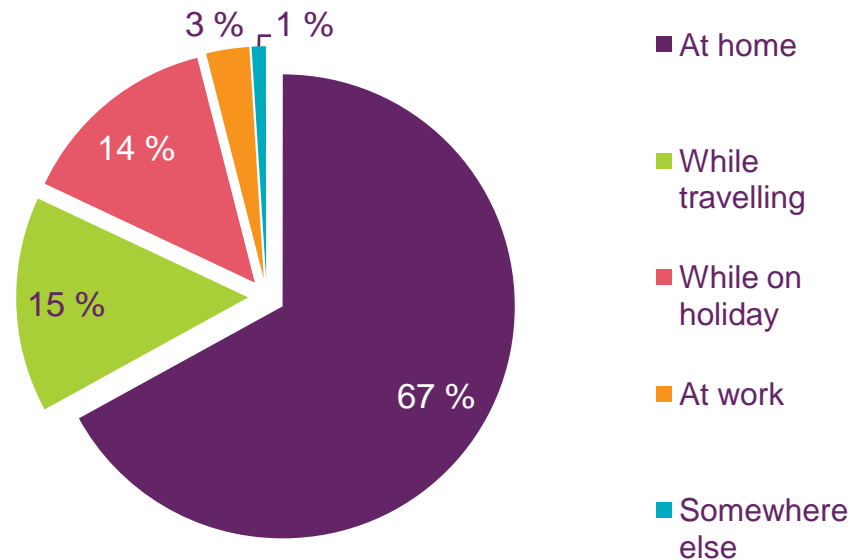
Source: Ofcom research

Q.C4 Why did you decide to buy an e-reader?

Base: All respondents with an e-reader: 500

## Figure 1.65

Where do people primarily use their e-reader?



Source: Ofcom research

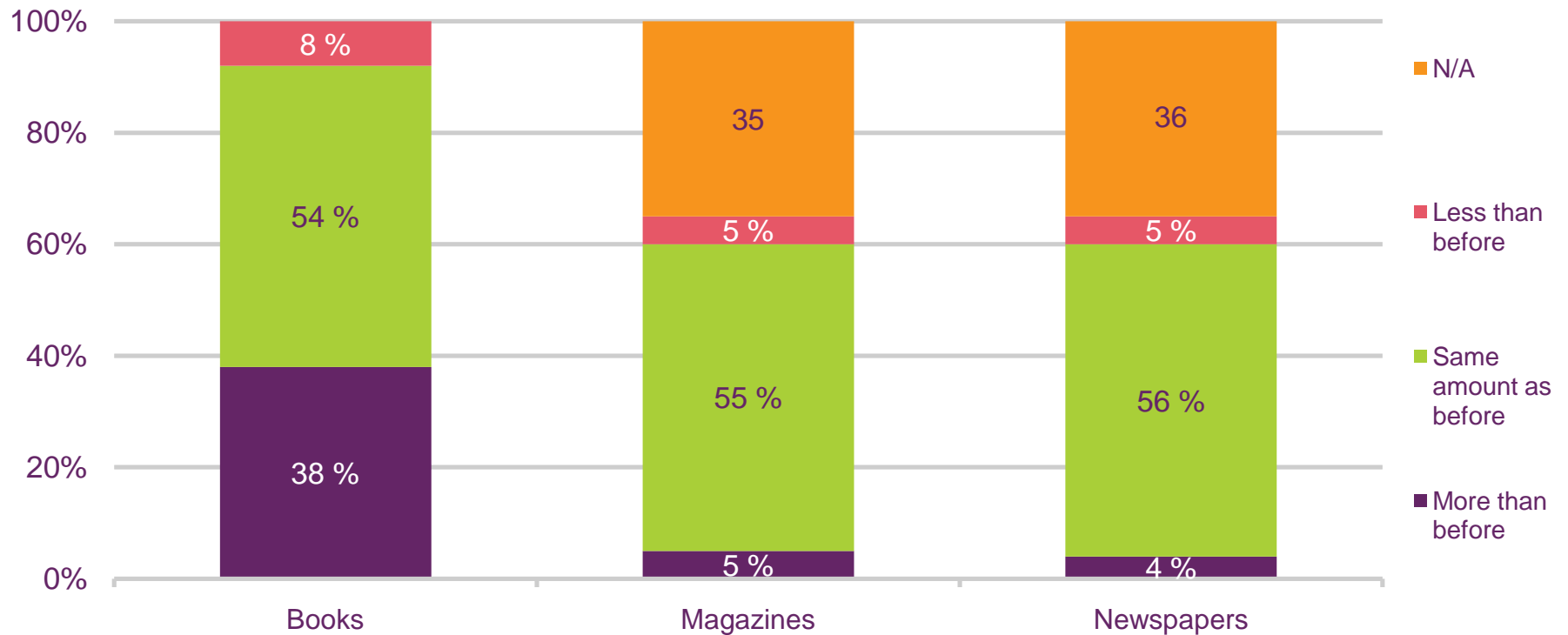
Q.C8 Where do you primarily use your e-reader?

Base: All respondents with an e-reader: 500



# Figure 1.66

## Positive impact on reading books



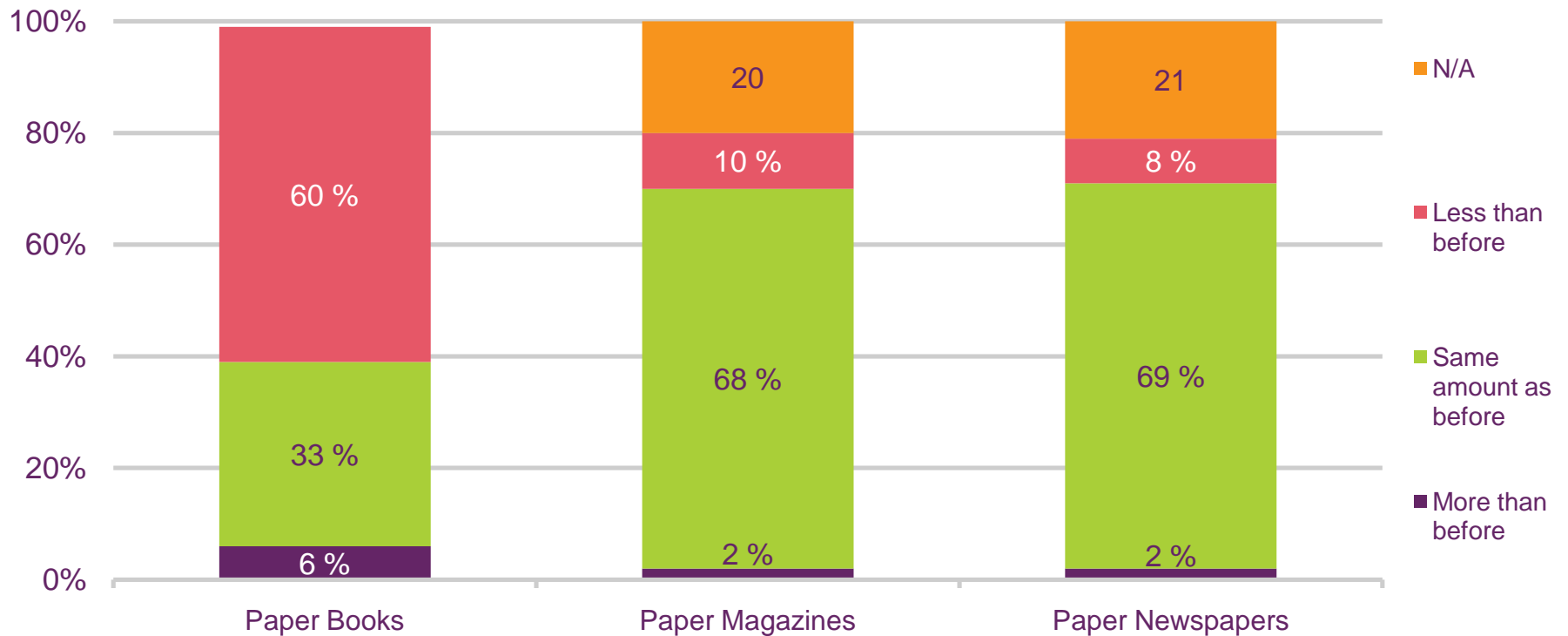
Source: Ofcom research

Q.C6 Since owning your e-reader have you read books, magazines or newspapers more or less than before?

Base: All respondents with an e-reader: 500

# Figure 1.67

## Impact on reading paper material



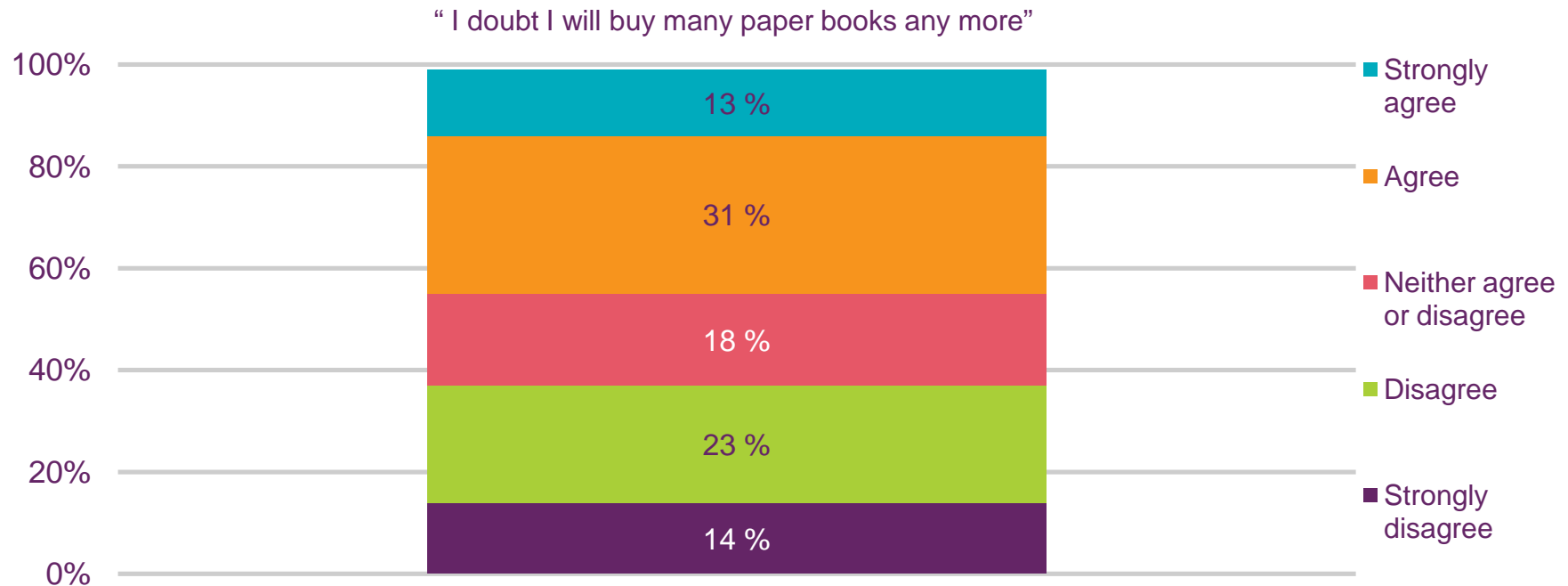
Source: Ofcom research

Q.C7 We'd now like you to think specifically about paper based content, so since owning your e-reader have you read books, magazines or newspapers more or less than before?

Base: All respondents with an e-reader: 500

## Figure 1.68

### Replacing paperback books with e-book equivalents



Source: Ofcom research

Q.C10 To what extent do you agree or disagree with the following statements?

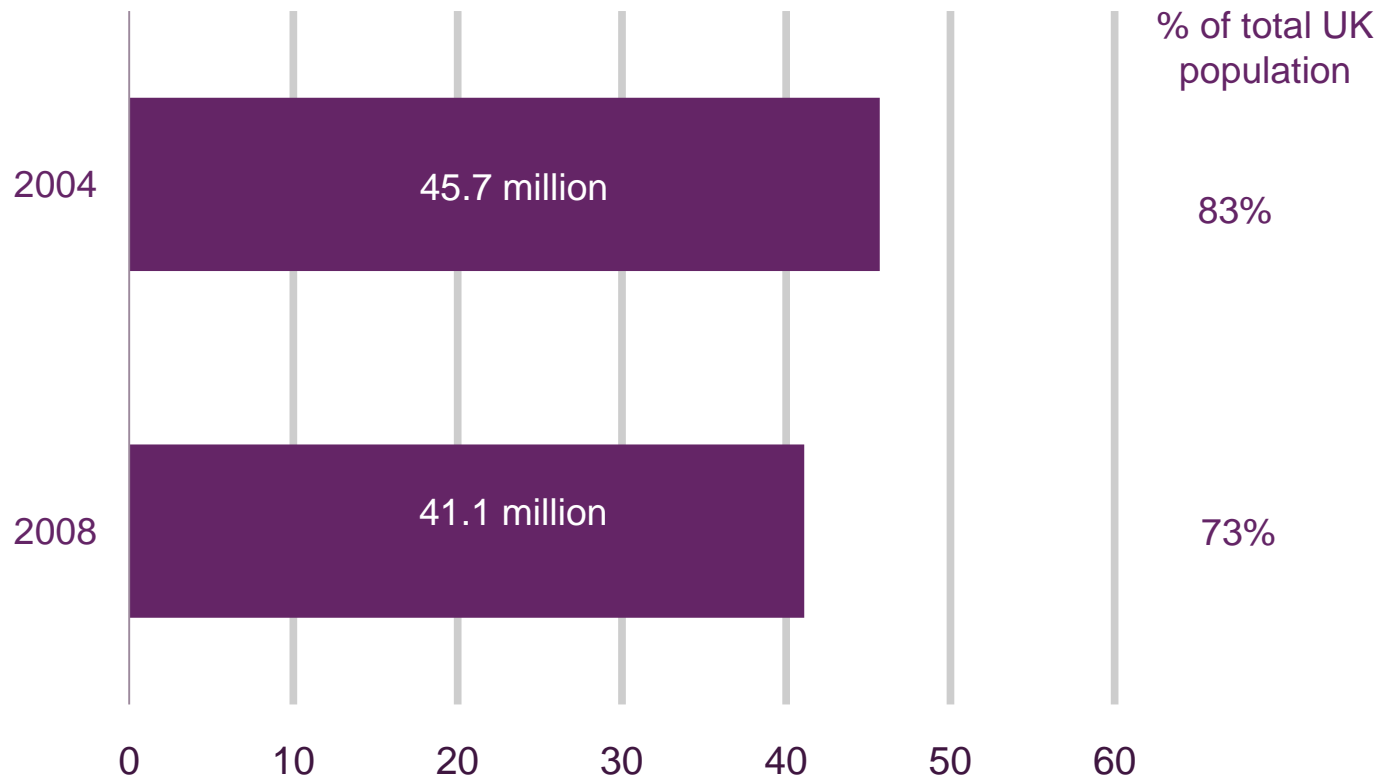
Base: All respondents with an e-reader: 500

# The London 2012 Games: media consumption

June 2012

## Figure 1.69

### Television reach of the Olympics: 2004 and 2008

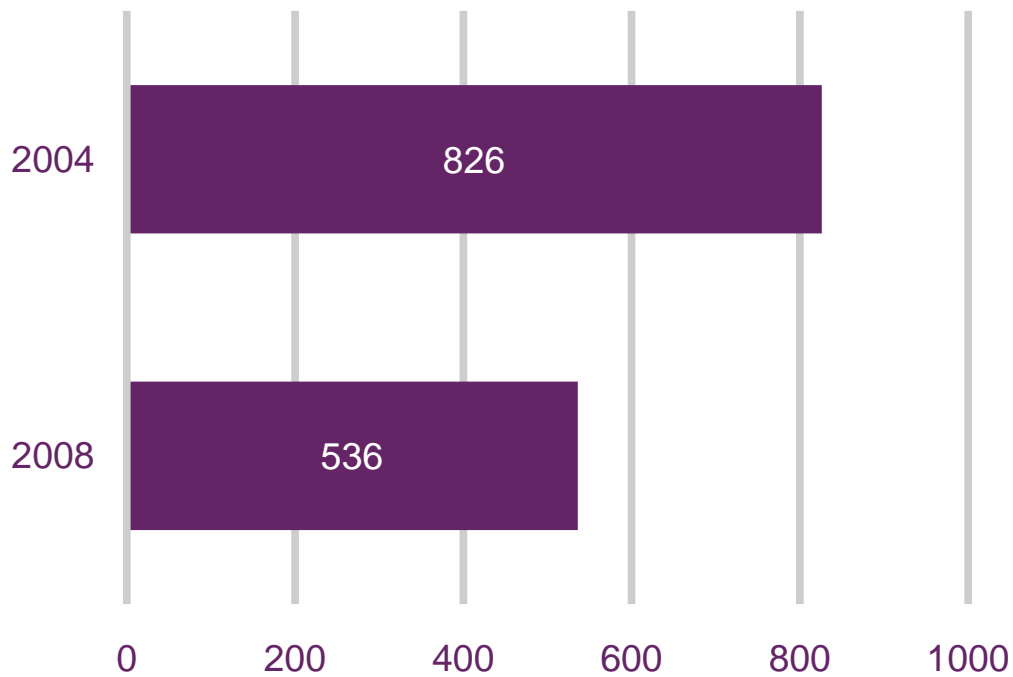


Source: BARB 2004 and 2008. 15+ minutes consecutive reach, all individuals 4+

# Figure 1.70

## Average time spent watching the Olympics: total minutes

Average total minutes

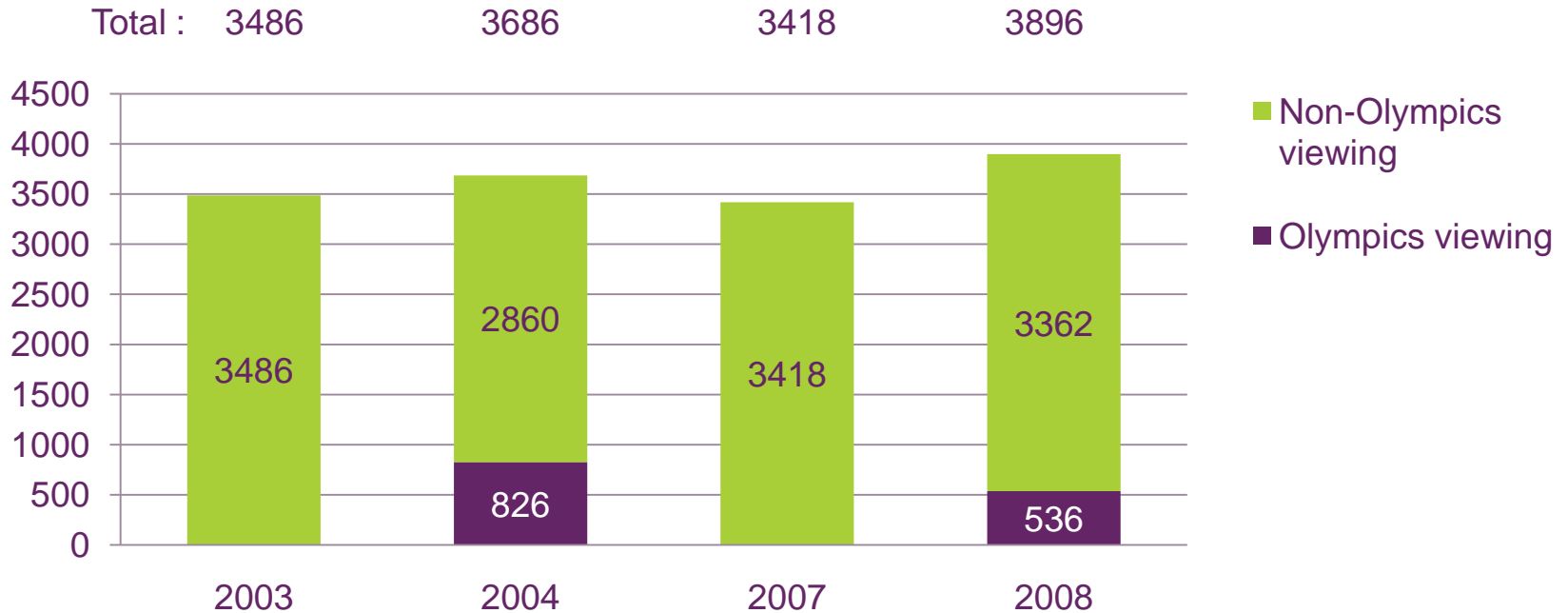


Source: BARB data 2004: 13/08/2004 to 29/08/2004 and 2008: 08/08/2008 to 24/08/2008

# Figure 1.71

## Total viewing in Olympics and preceding year (total minutes)

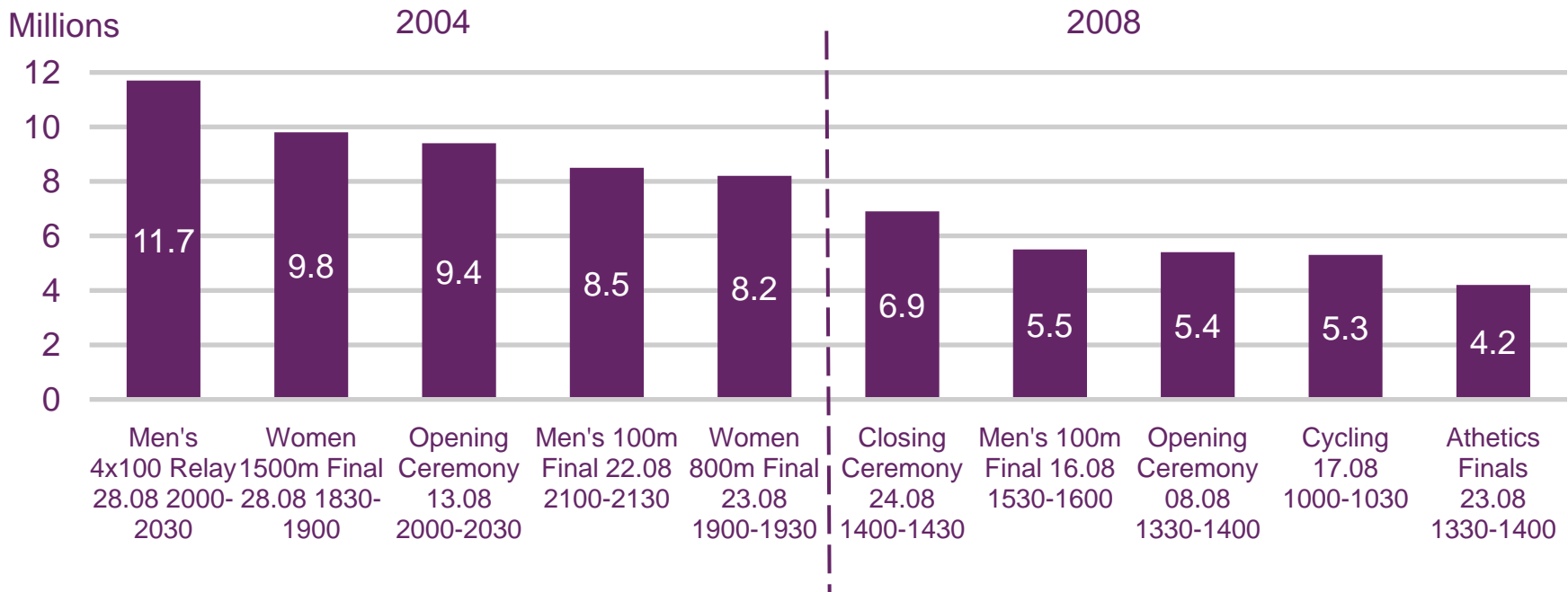
Total minutes viewed



Source: BARB data 2003: 13/08/2003 to 29/08/2003.2004: 13/08/2004 to 29/08/2004 2007 08/08/2007 to 24/08/2007 and 2008: 08/08/2008 to 24/08/2008

# Figure 1.72

Top five most viewed half-hour slots: by viewer numbers, 2004 and 2008



Source: BARB data 2004 and 2008. Average audiences in '000s.





## Figure 1.73

### Take-up of communications devices and services

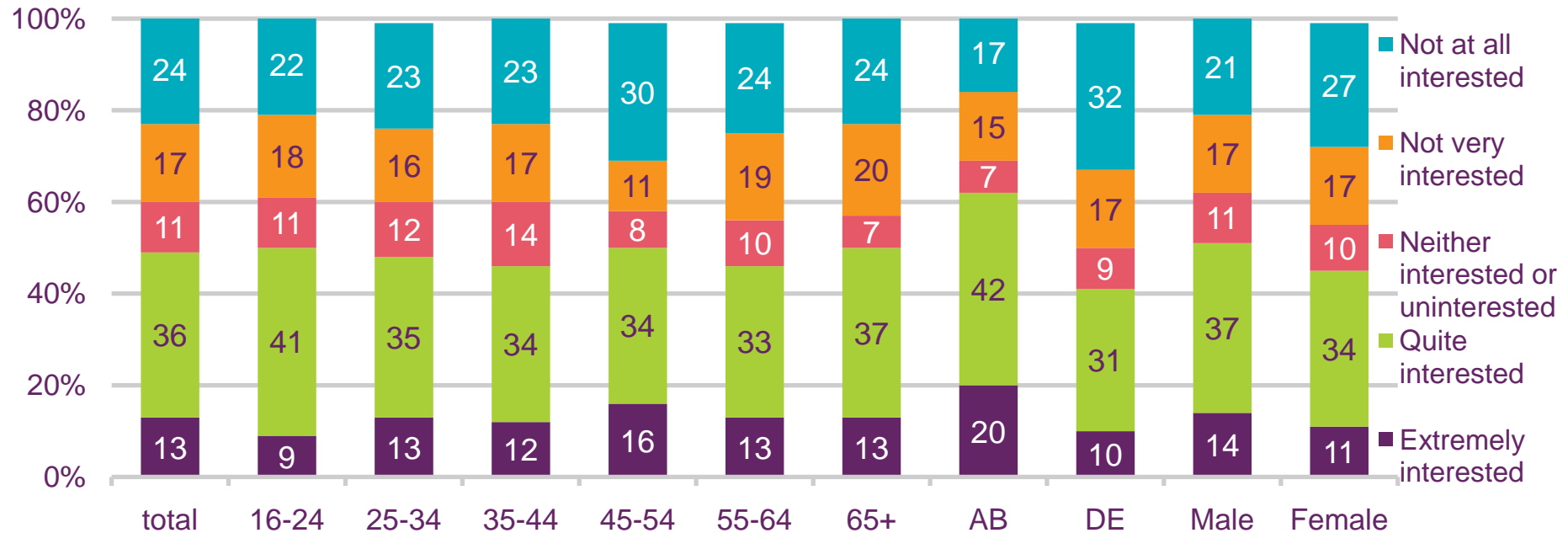
	2008 % UK adults	2012 % UK adults
Broadband at home (excl. mobile)	58	76
PC/laptop/netbook*/tablet*	69	79
Smartphone*	-	39
Connected TV*	-	5
DVR	20	47
HD or HD ready*	-	70
3D ready*	-	6
Tablets*	-	11

Source: Ofcom Technology Tracker Q1 2008/ 2012. \*Did not ask about these devices in 2008

# Figure 1.74

## Levels of interest in the Games

Proportion of UK adults (%)



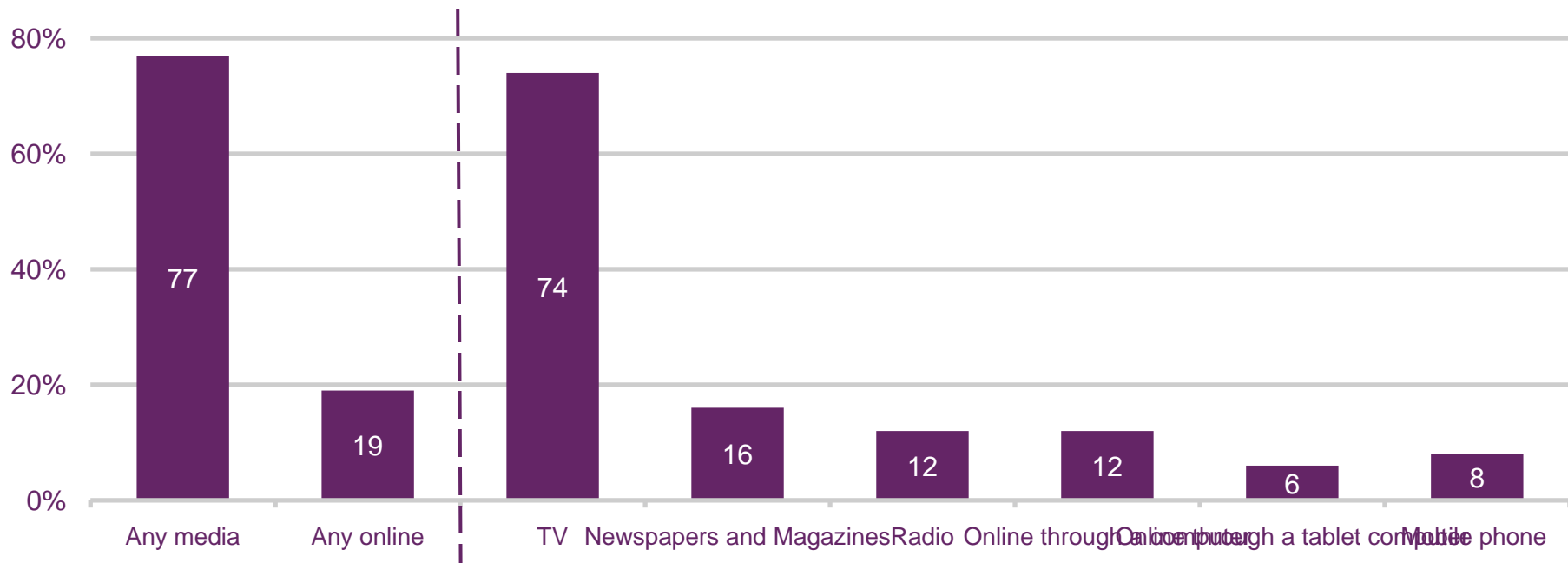
Source: Ofcom Research

Q4. Thinking about the London 2012 Olympic and/or Paralympic Games happening this July and August, please tell me how interested you are, using the following scale?

Base: All adults in UK: 2192

# Figure 1.75

## Type of media intentions



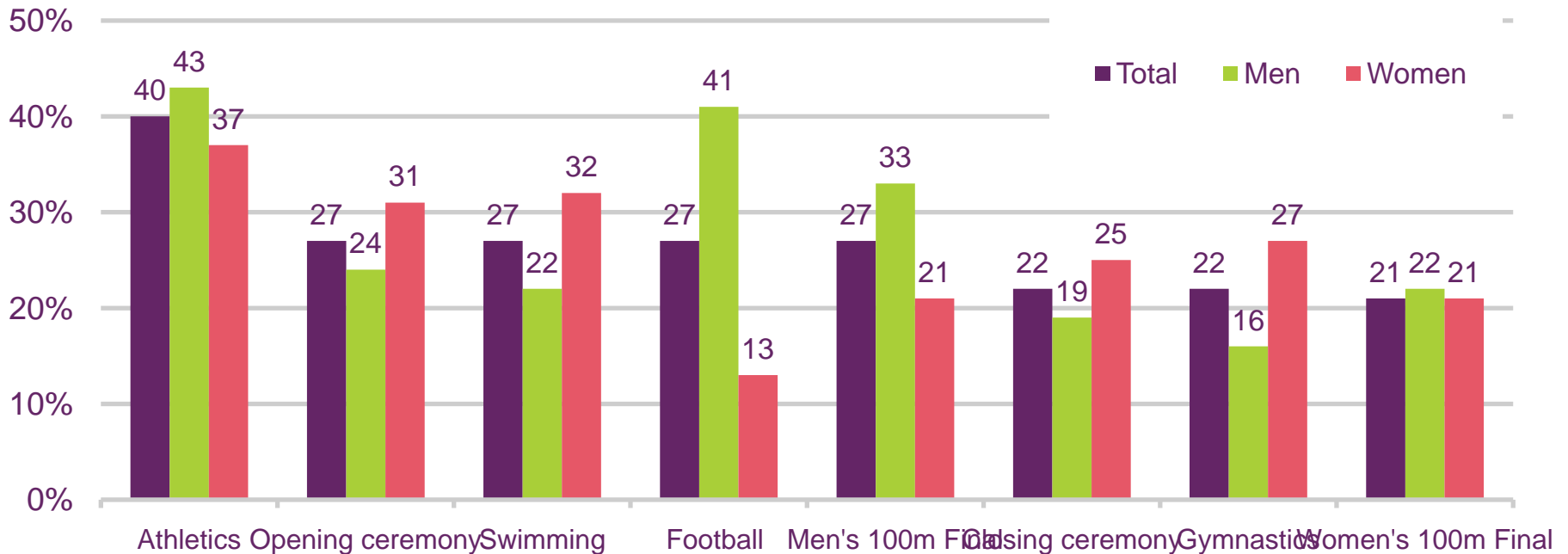
Source: Ofcom Research

Q8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.76

## Interest in following coverage of Olympic events by gender



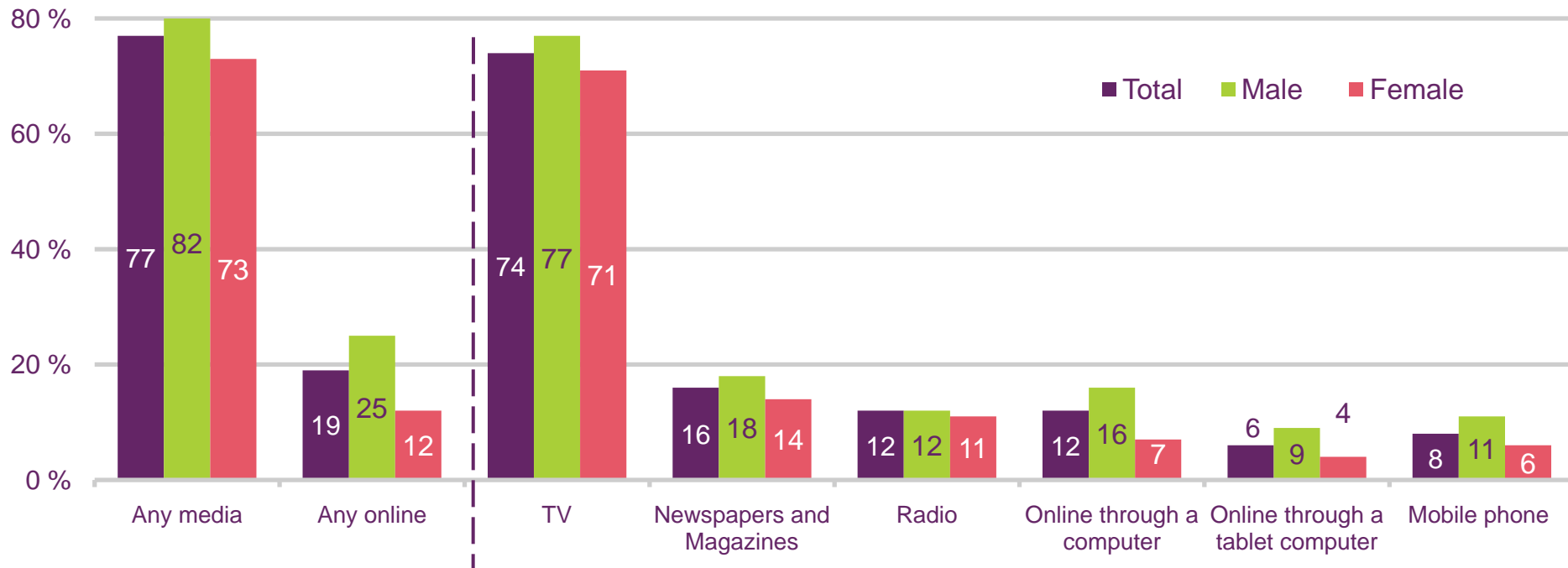
Source: Ofcom Research

Q.6A1 Which, if any, of these Olympic events are you interested in following coverage of?

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.77

## Type of media intentions, by gender



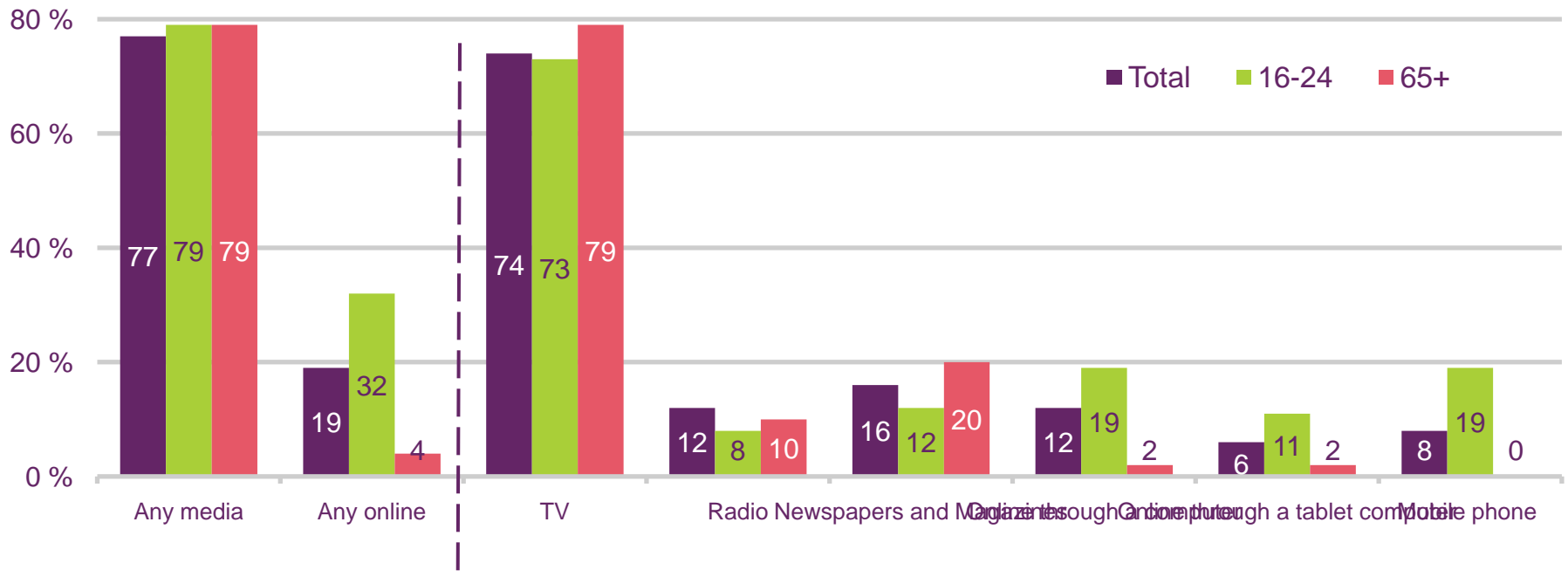
Source: Ofcom Research

Q8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.78

## Type of media intentions, by age



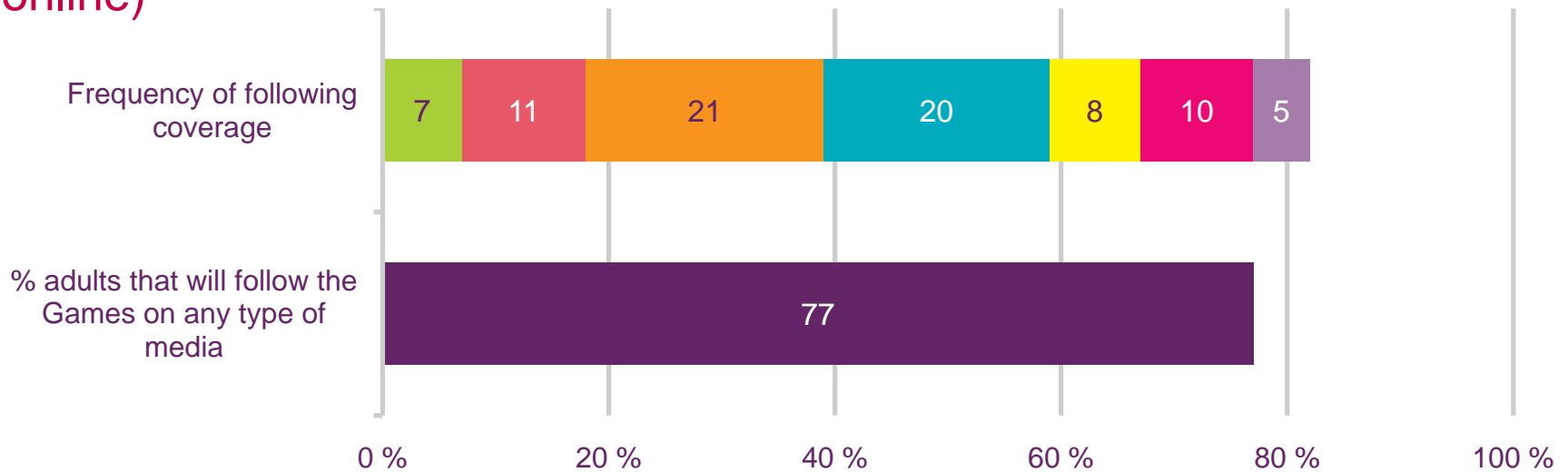
Source: Ofcom Research

Q8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.79

Frequency of following coverage of the Games (via television, radio or online)



■ Follow at all 
 ■ Lots of times a day 
 ■ A couple of times a day 
 ■ Every day 
 ■ Most days 
 ■ Once a week 
 ■ Less often 
 ■ Don't know

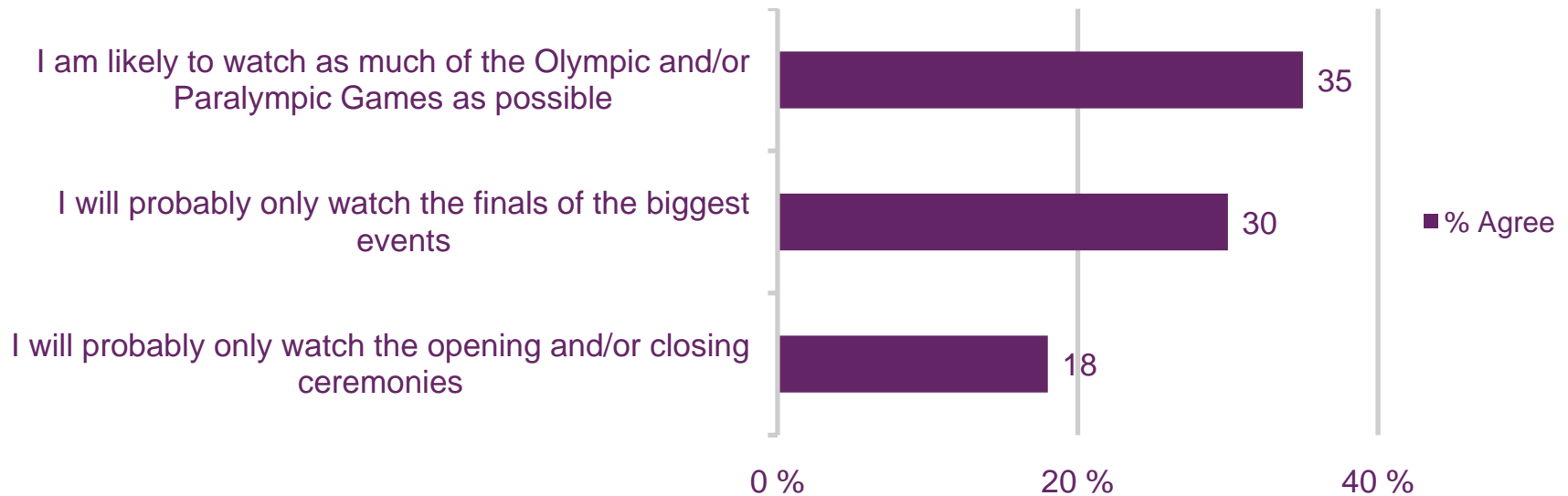
Source: Ofcom Research

Q7 Approximately how often do you think you will access coverage of the Olympic or Paralympic Games, either through watching television coverage, listening to radio coverage or accessing coverage online?

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.80

## Attitudes towards the Games



Source: Ofcom Research

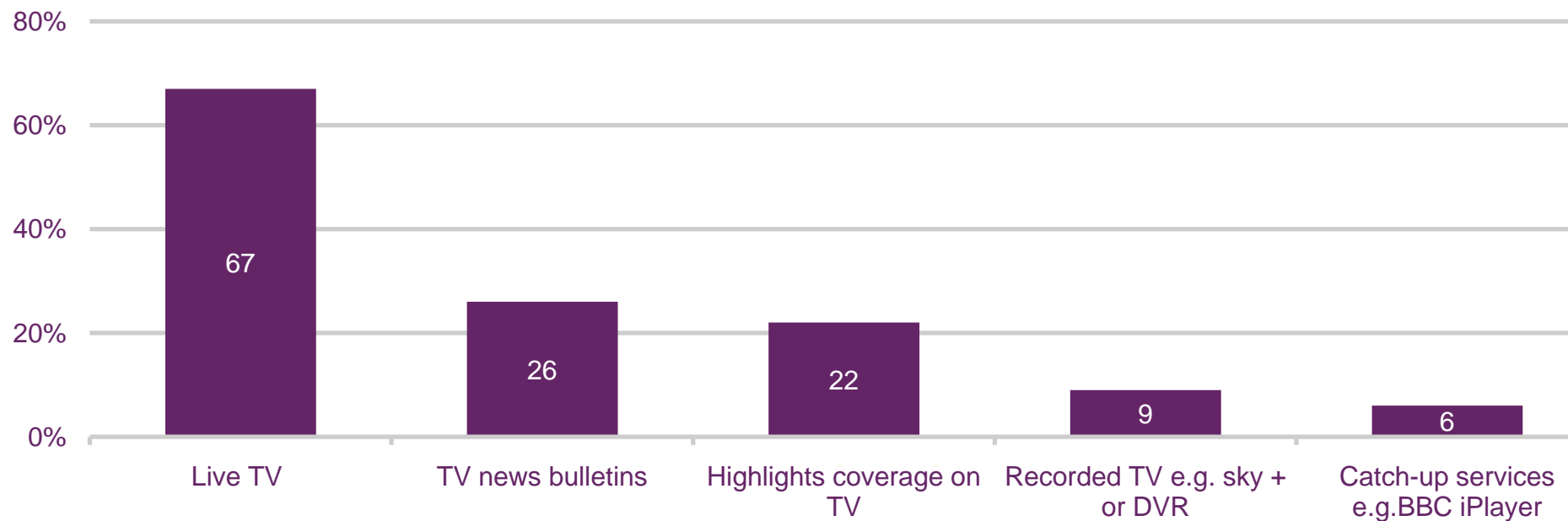
Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each.

Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192



## Figure 1.81

How people expect to watch coverage on their television set



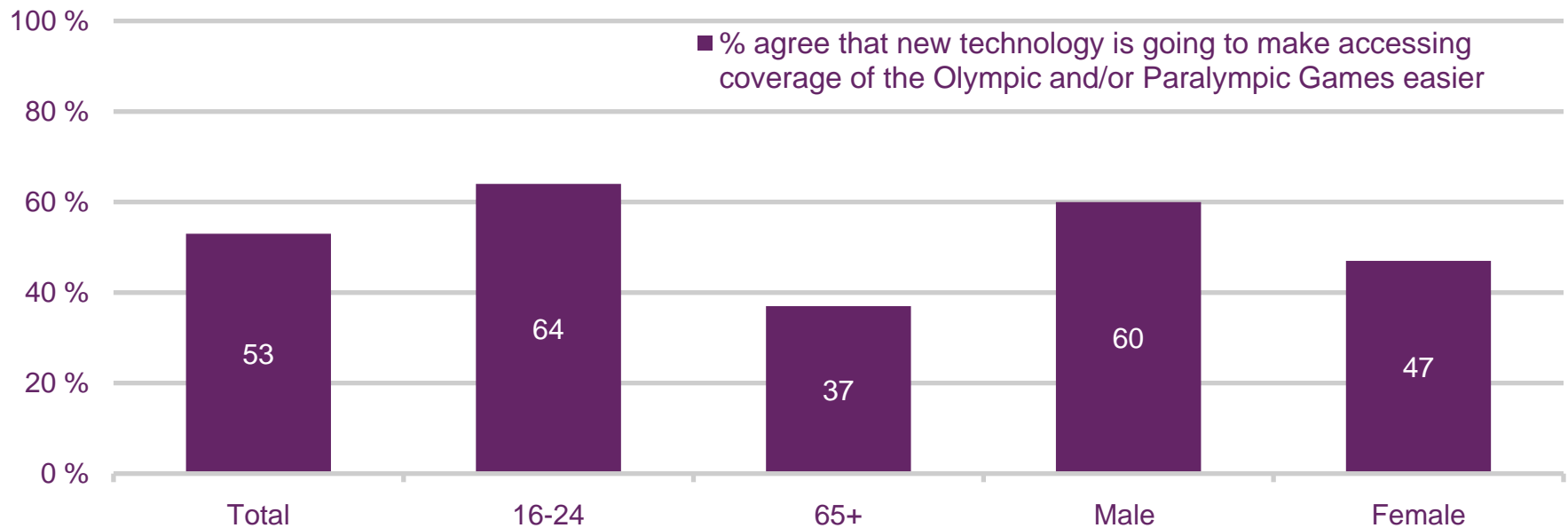
Source: Ofcom Research

Q8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games...

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.82

## New technology is going to make accessing coverage easier



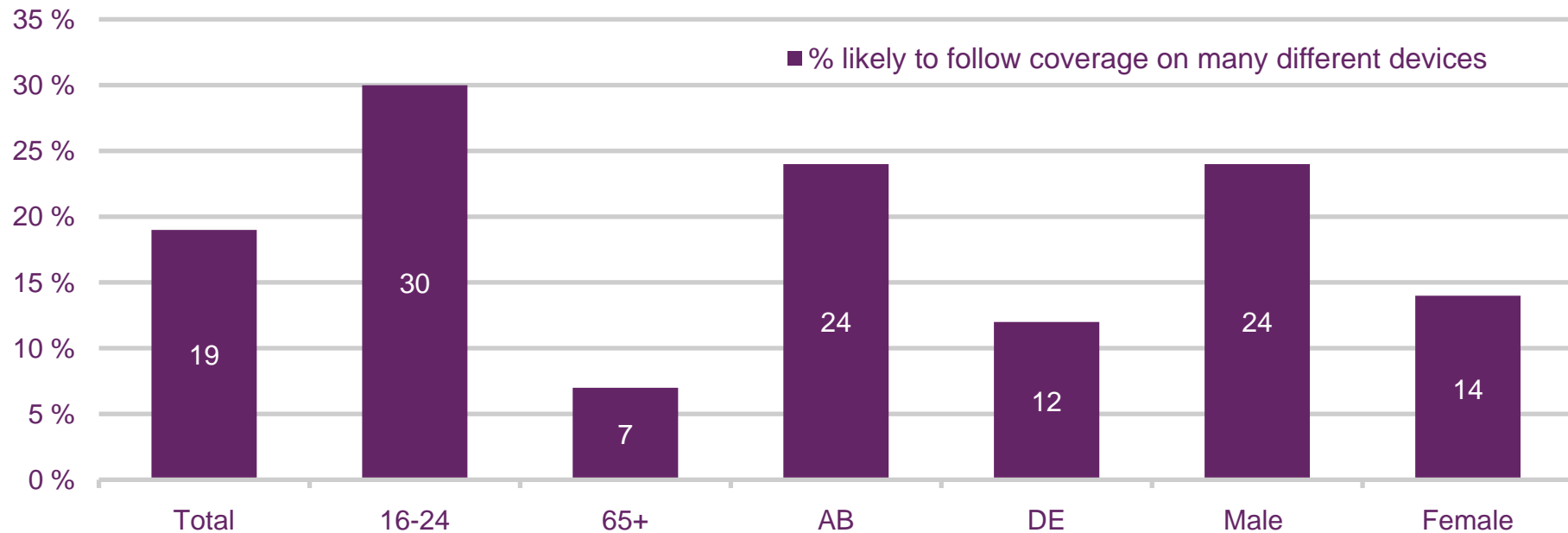
Source: Ofcom research

Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each. New technology is going to make accessing coverage of the Olympic and/or Paralympic Games easier

Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.83

## Intention to follow coverage on many different devices



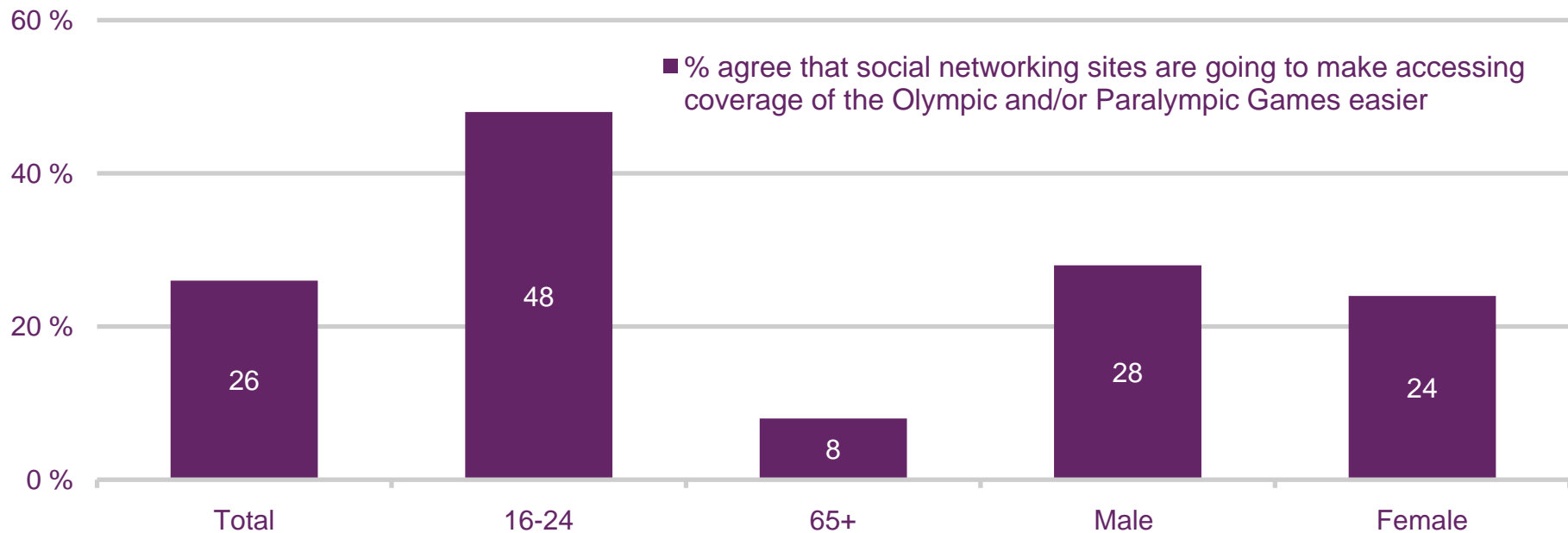
Source: Ofcom research

Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each. I am likely to follow the Olympic Games and/or Paralympic Games on many different devices

Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.84

## Attitudes to social networking and the Games



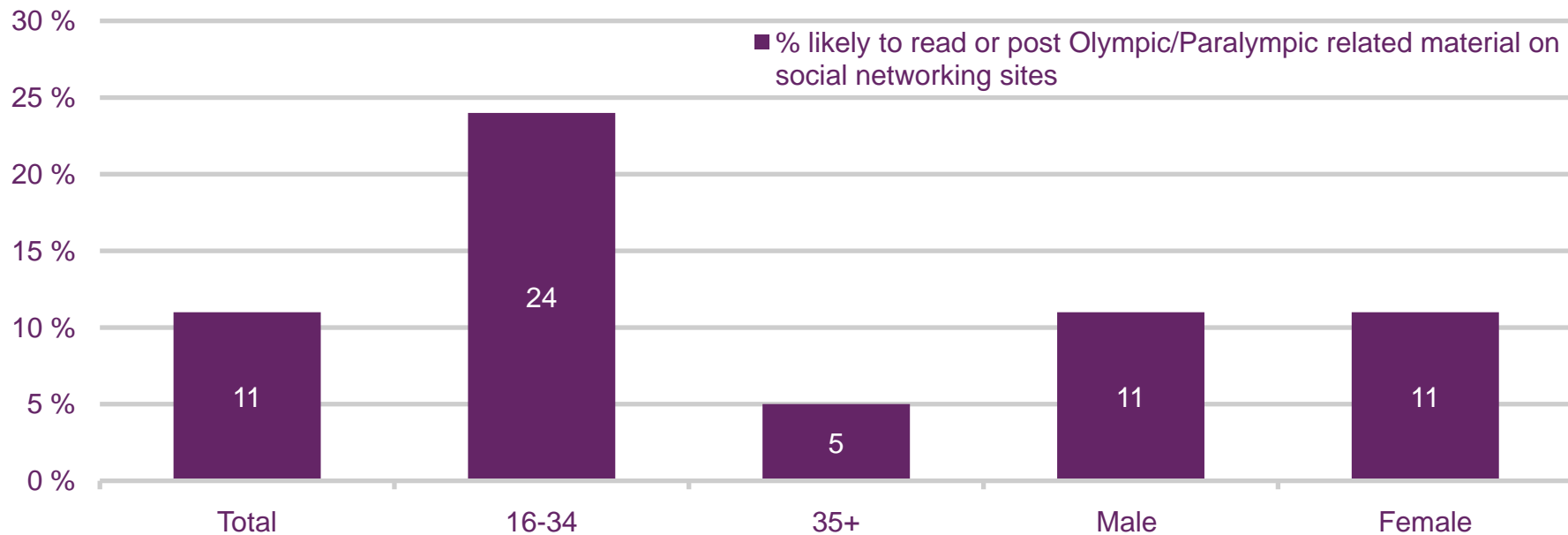
Source: Ofcom Research

Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each. Social networking sites like Facebook and Twitter are going to make following the Olympic and/or Paralympic Games easier

Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

# Figure 1.85

## Anticipated social networking about the Games while watching/listening to coverage



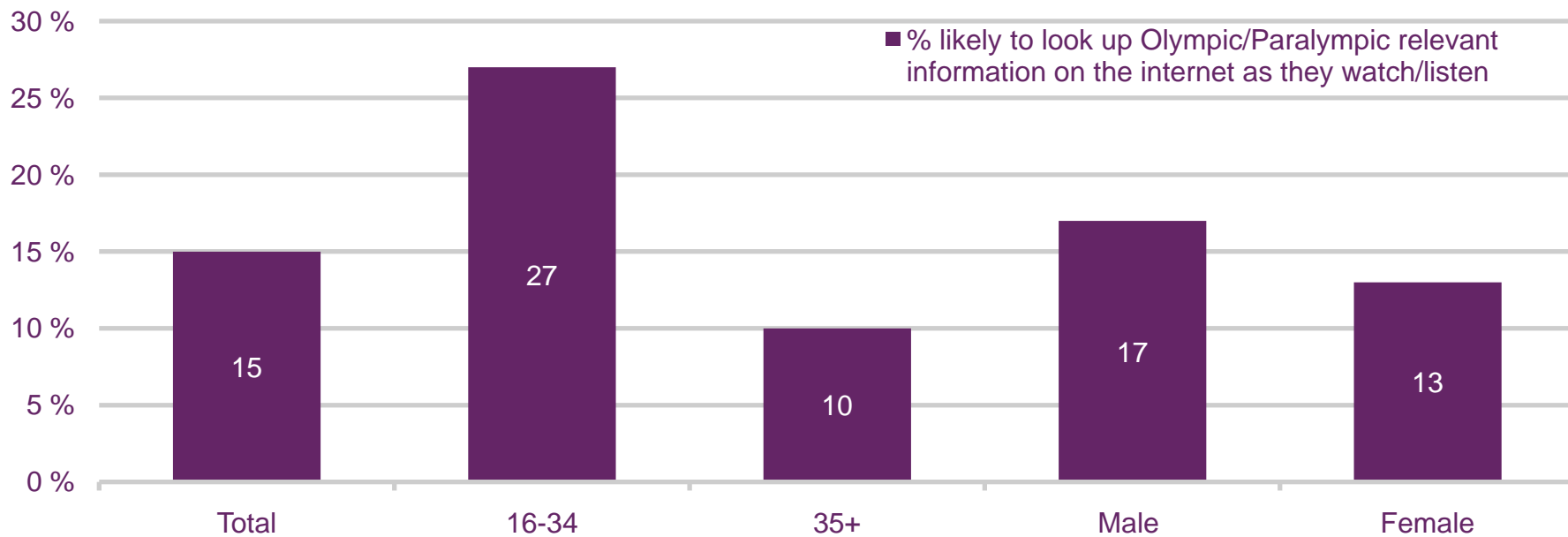
Source: Ofcom research

Q14 When watching or listening to coverage of the Olympic and or Paralympic Games, how likely are you to use social networking (e.g. Facebook or Twitter) sites to read or post related messages (e.g. about the Olympic event)?

Base: Question asked of 331 adults/Olympic non-rejectors who ever use social networking sites (e.g. Facebook or Twitter) when watching television to read or post related messages (e.g. about the programme or news event). Answers re-based on UK adult sample of 2192

## Figure 1.86

### Looking up information online about the Games while watching/listening to coverage



Source: Ofcom research

Q16 When watching or listening to coverage of the Olympic and or Paralympic Games, how likely are you to use the internet to look up relevant information (e.g. About the Olympic event)

Base: Question asked of 508 adults/Olympic non-rejectors who ever use the internet to look up relevant information (e.g. about the programme). Answers rebased on UK adult sample of 2192

# Nations chapter slides (UK report)



# Figure 1.87

## UK communications market: fast facts



	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK Rural
Digital TV take-up among TV homes	98 ↑+2	97	99	99	91	97 ↑+2	98 ↑+4
Total broadband take-up	76	78	68 ↑+7	68	69	76	77
Mobile broadband take-up	13	13	12	16	7	13	10
Mobile phone take-up	92	93	85	92 ↑+5	93	92	92
Use mobile to access internet	39 ↑+7	40 ↑+6	31 ↑+10	39 ↑+14	35 ↑+6	39 ↑+5	35 ↑+12
Smartphone take-up	39 ↑+12	40 ↑+11	32 ↑+14	39 ↑+14	34 ↑+13	39 ↑+12	37 ↑+10
Fixed landline take-up	84	85	82	80	84	83	91+
Households taking bundled services	57 ↑+4	58 ↑+4	47	47	51 ↑+5	57 ↑+3	56 ↑+11
DAB ownership amongst radio listeners	38	40	29	29	22	38	41
Smart TV ownership among TV homes	5	5	4	3	4	5	4
Tablet computer take-up	11 ↑+9	11 ↑+9	11 ↑+10	8 ↑+6	9 ↑+7	11 ↑+9	11 ↑+9
E-reader take-up (personal use)	10 ↑+7	10 ↑+7	8 ↑+6	13 ↑+10	8 ↑+5	11 ↑+8	15+ ↑+12
Fixed telephony availability	100	100	100	100	100	100	100
Fixed broadband availability <sup>1</sup>	100.0	100.0	99.9	100.0	100.0	100.0	99.9
LLU availability <sup>2</sup>	92	93	84	88	79	99	64
Cable broadband availability <sup>3</sup>	44	47	35	23	29	51	18
FTTC broadband availability <sup>4</sup>	31	33	10	17	87	35	15
Superfast broadband availability <sup>5</sup>	60	62	42	34	88	67	28
2G mobile availability <sup>6</sup>	100	100	99	99	99	-	-
3G mobile availability <sup>7</sup>	99	100	97	98	88	-	-
DTT availability <sup>8</sup>	97	98	99	98	66	-	-
TV consumption (hours per day) <sup>9</sup>	4.0	3.6 - 4.5	4.5	4.4	4.2	-	-
Radio consumption (hours per day)	3.2	3.2	3.1	3.3	3.2	-	-

Source: Ofcom / operators

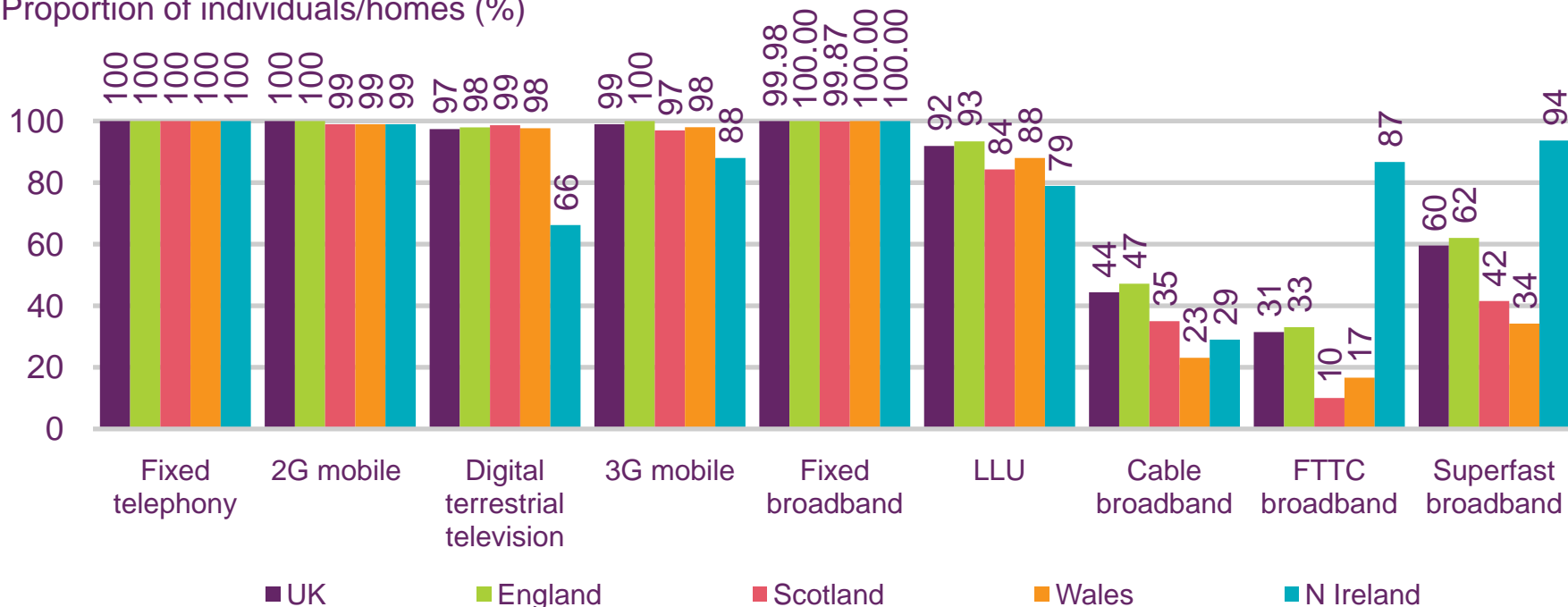


# Figure 1.88



## Communications infrastructure availability across the UK nations

Proportion of individuals/homes (%)



Sources: Ofcom

1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator.
2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator.
3. Ofcom estimate of the proportion of households connected to an ADSL-enabled BT local exchange.
4. Ofcom estimate of the proportion of households connected to an LLU-enabled BT local exchange.
5. Ofcom estimate of the proportion of households passed by Virgin Media’s cable broadband network; excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV cable services.
6. Ofcom estimate of the proportion of households able to receive FTTC services
7. Ofcom estimate of the proportion of households able to receive superfast broadband services

# Figure 1.89

## Coverage of 2G and 3G mobile services

Proportion of premises with outdoor coverage (per cent)



Source: Ofcom based on mobile operator data, May 2012

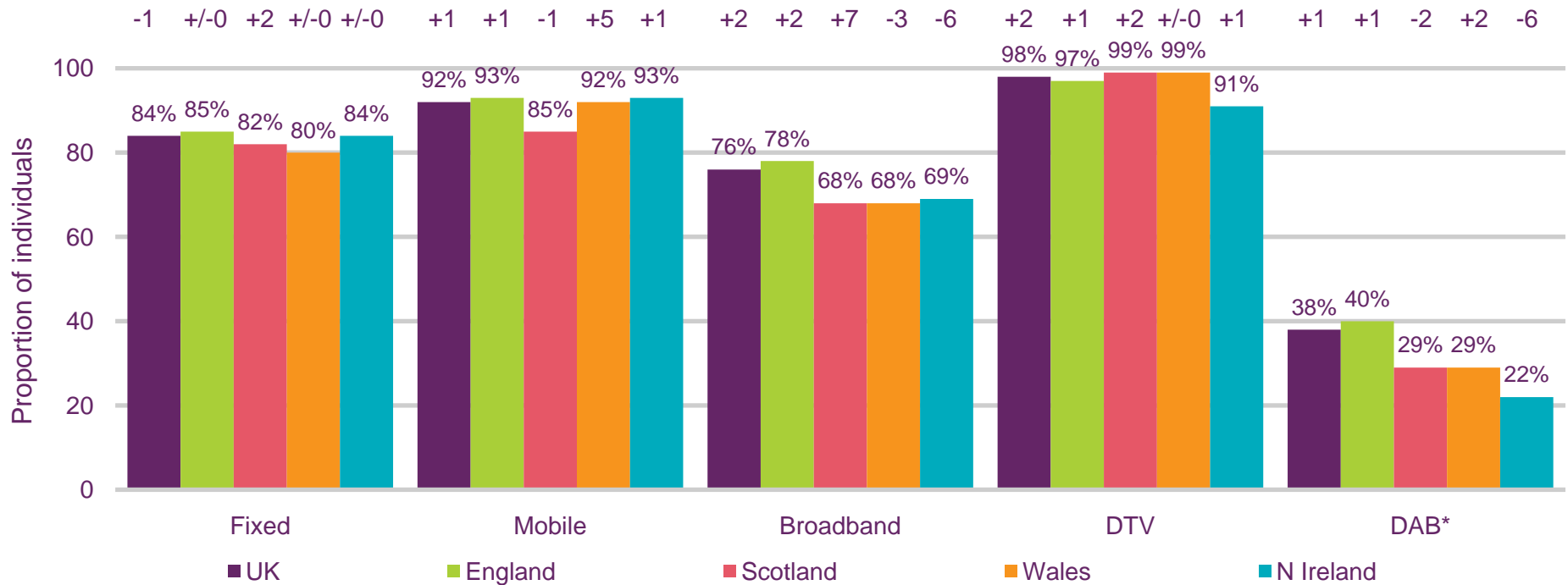
Note: This data is based on calculating coverage in 200 metre square pixels that cover the UK; this improved methodology is different to that used in the 2011 Communications Market Report, and as such the two sets of figures are not comparable.

# Figure 1.90

Figure above bar shows % point change from Q1 2011



## Patterns communications service adoption across the nations, 2012



Source: Ofcom research, Quarter 1 2012

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

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

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

Mobile question: Do you personally use a mobile phone?

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

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

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

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

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

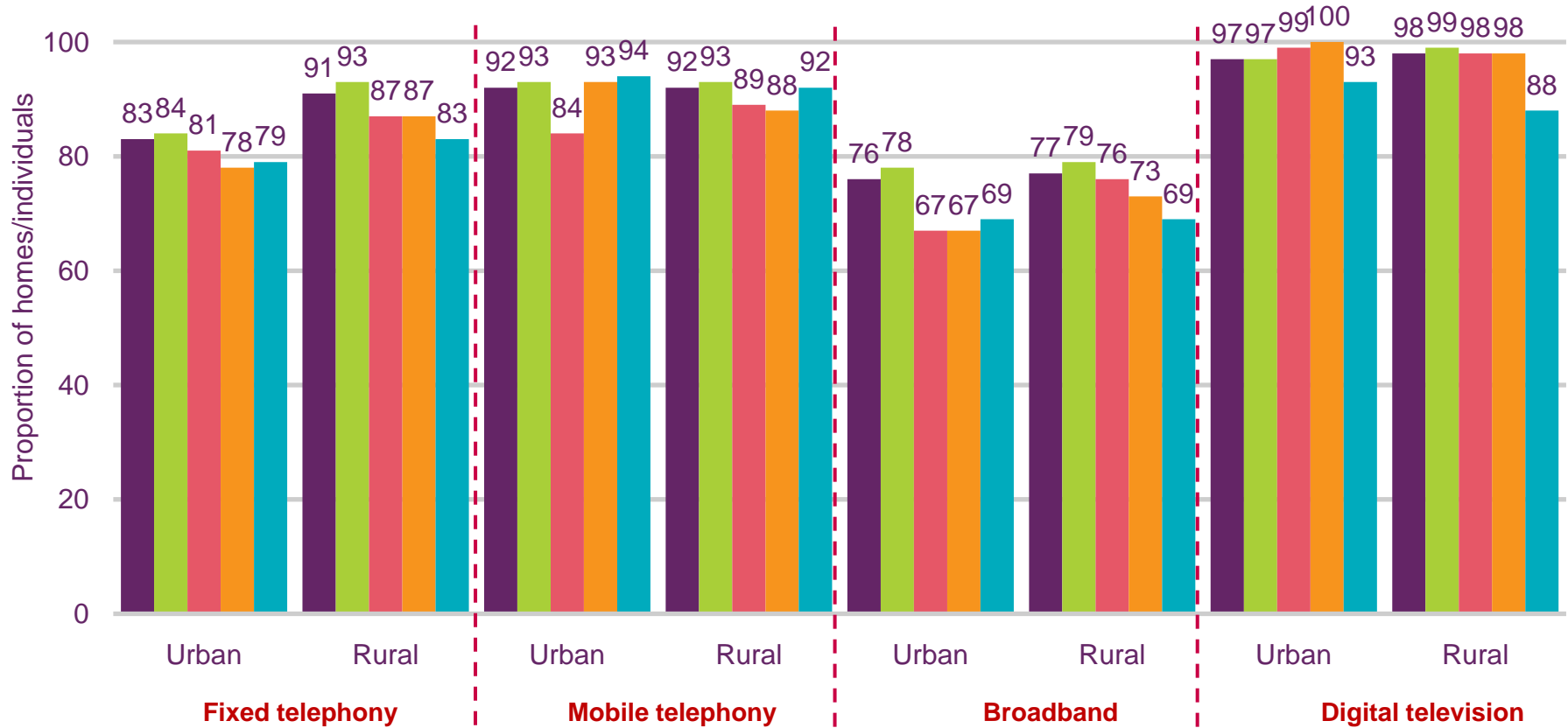
DAB question: How many of these radio sets are digital radios? Response represents those with one or more sets.

Note: Remaining percentages are Don't know responses

# Figure 1.91

## Adoption of communications technology/services in urban and rural locations

■ UK ■ England ■ Scotland ■ Wales ■ Northern Ireland



Source: Ofcom research, Quarter 1 2012

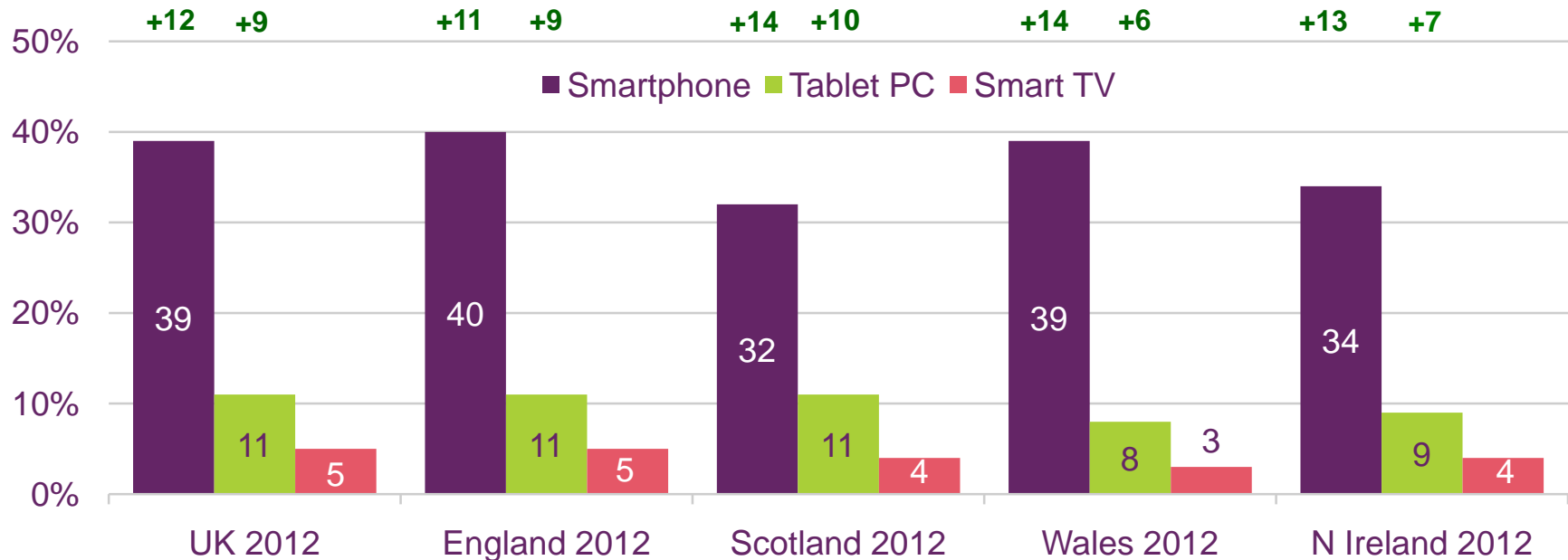
Fixed telephony, mobile telephony, broadband base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

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

Figure 1.92

## Ownership of smartphones, tablets and smart TVs

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



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

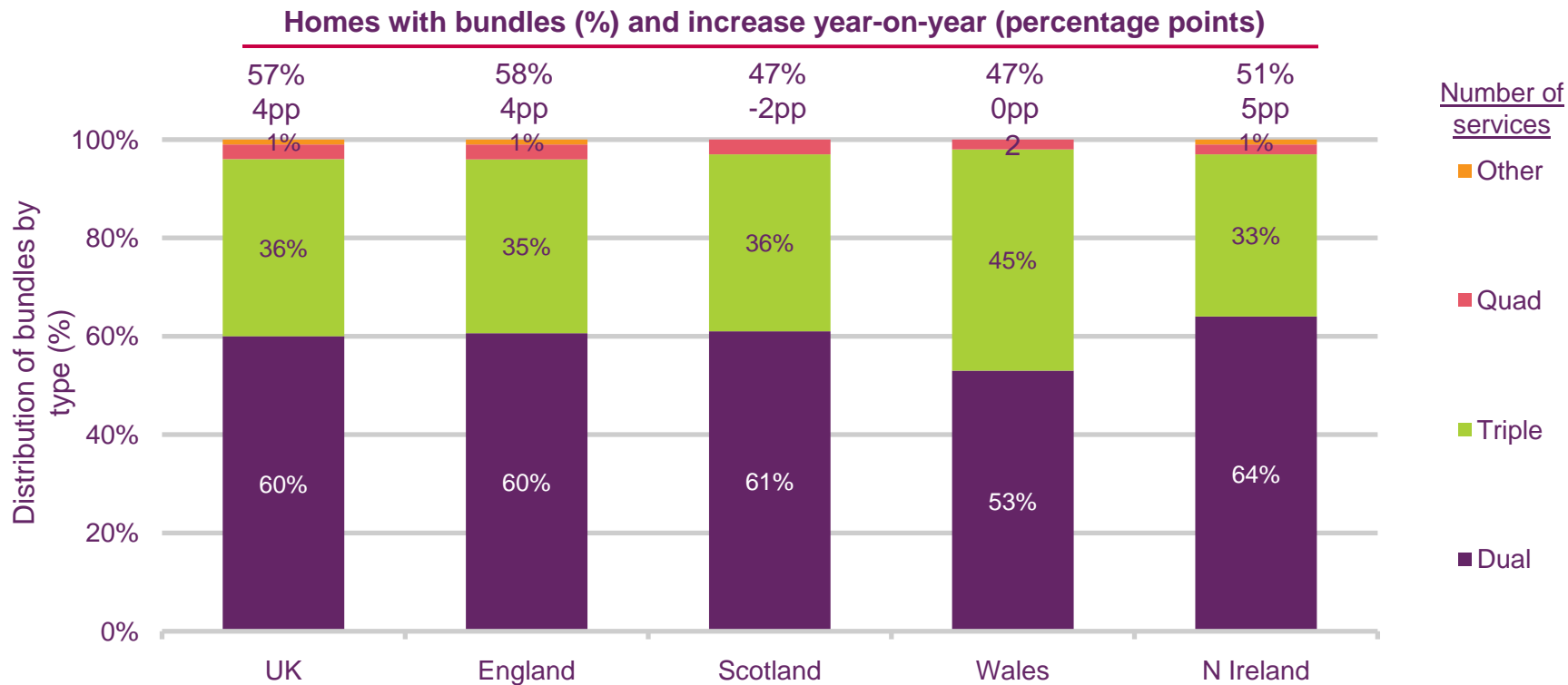
Source: Ofcom research, Quarter 1 2012

Tablet and smart TV base: All adults aged 16+ (n = 3772 UK, 508 Northern Ireland, 2251 England, 500 Scotland, 513 Wales, 255 Northern Ireland urban, 253 Northern Ireland rural, 511 Northern Ireland 2011, 508 Northern Ireland 2012)

Smartphone base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 430 Scotland, 2043 England, 456 Wales, 463 Northern Ireland, 220 Scotland urban, 210 Scotland rural)

Figure 1.93

## Take-up of bundles, by nation



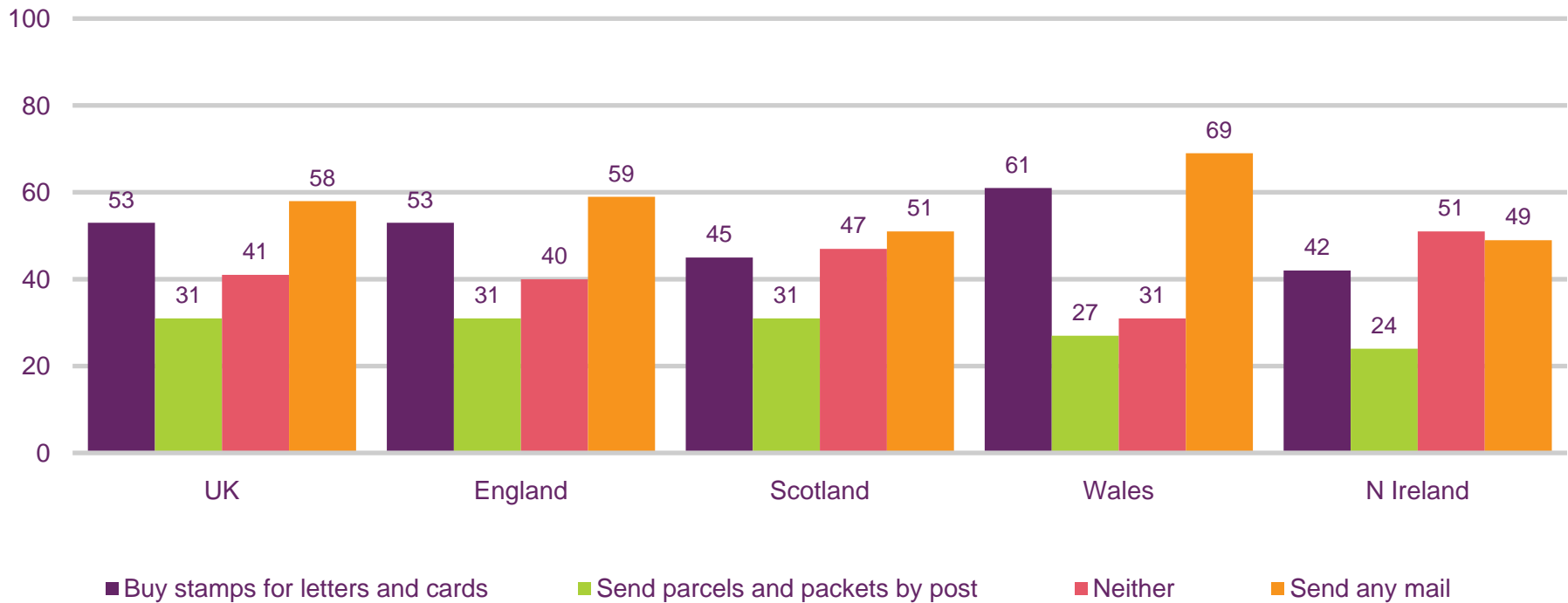
Source: Ofcom research, Q1 2012

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

Note: Remaining percentages are Don't know responses

Figure 1.94

## Regular use of postage stamps and postal services products by nation



Source: Ofcom Attitudes toward spending research, 2012

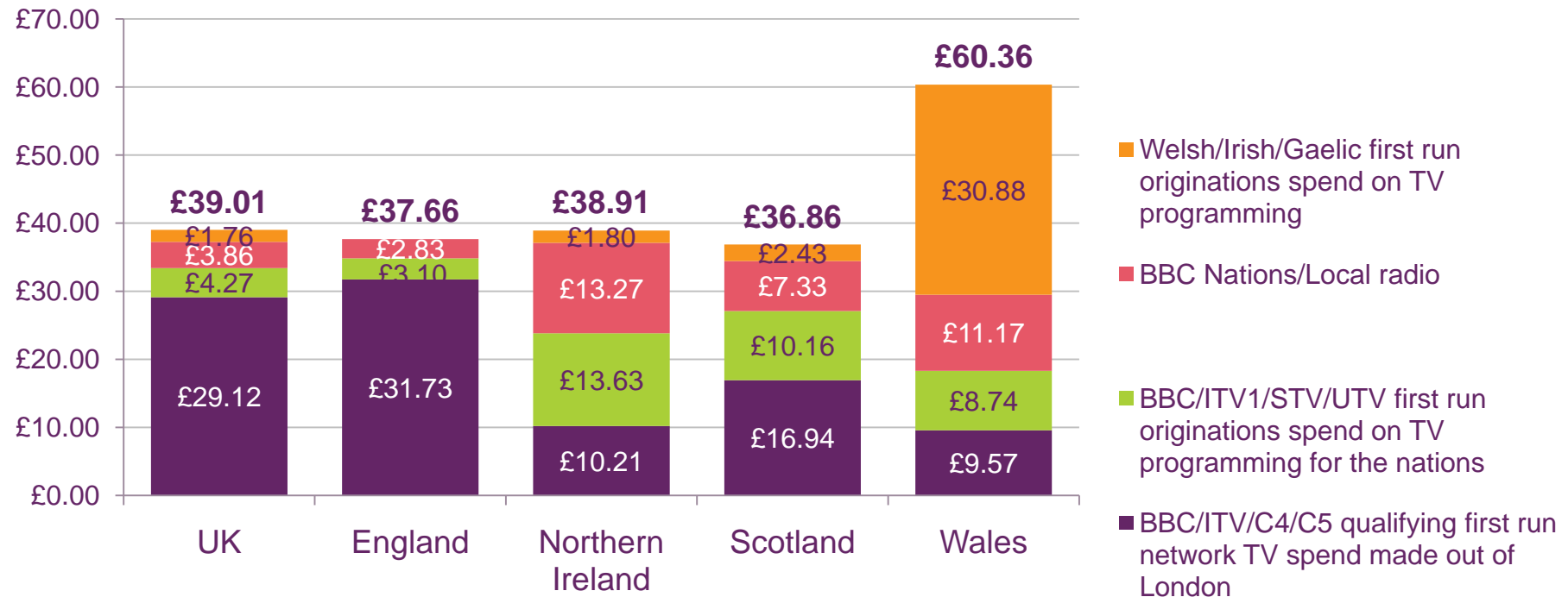
Base: All adults aged 16+ (n = 2124 UK, 1726 England, 182 Scotland, 99 Wales, 117 Northern Ireland)

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

**Figure 1.95**

## Spend per head by PSBs: 2011

Spend per head



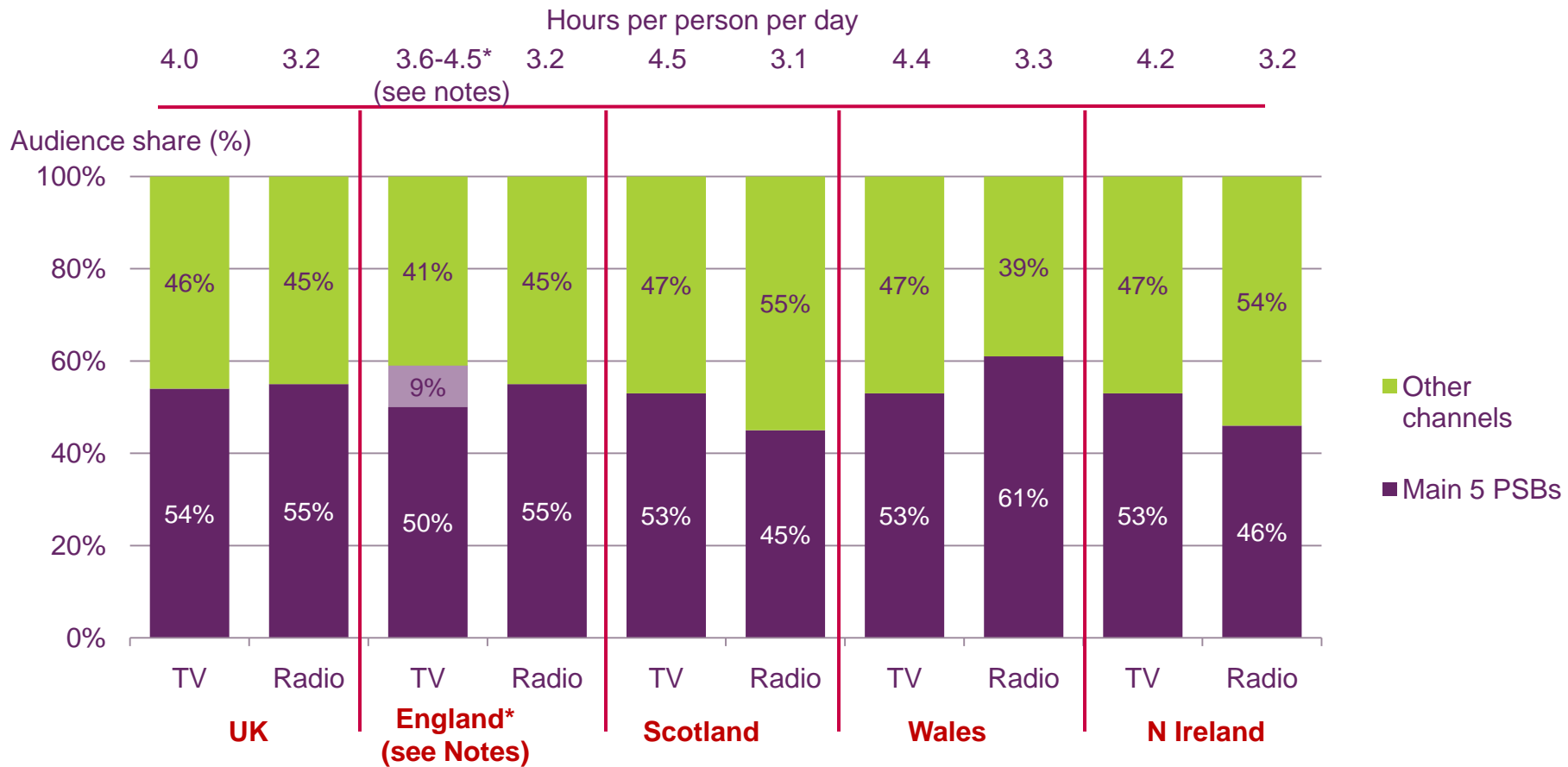
Source: broadcasters, BBC and S4C Annual Report and Accounts and Ofcom calculations. Figures include the BBC spend on programmes for S4C and BBC ALBA.

Made out of London figures are taken from the *Network Compliance Report, 2011*. For further details on made out of London, see [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on the Ofcom website



Figure 1.96

## Hours of daily viewing of television and radio, by nation: 2011



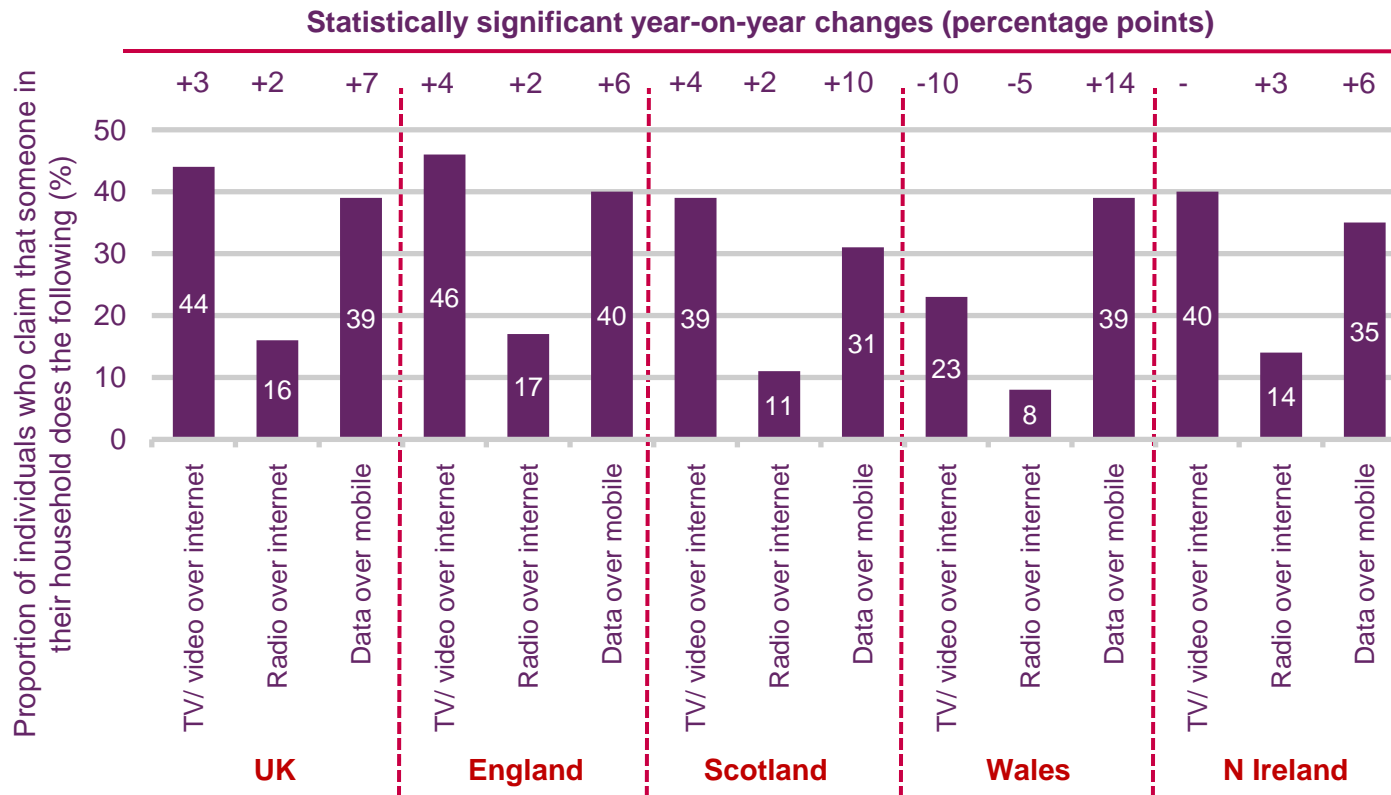
Source: TV = BARB. Based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Five.

Radio = RAJAR. Based on all adults (aged 16+). PSBs = all BBC radio. National data based on TSA's of BBC Radio stations of respective nations

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

Figure 1.97

## Consumers' use of converging platforms



Source: Ofcom research, Quarter 1 2012

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

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

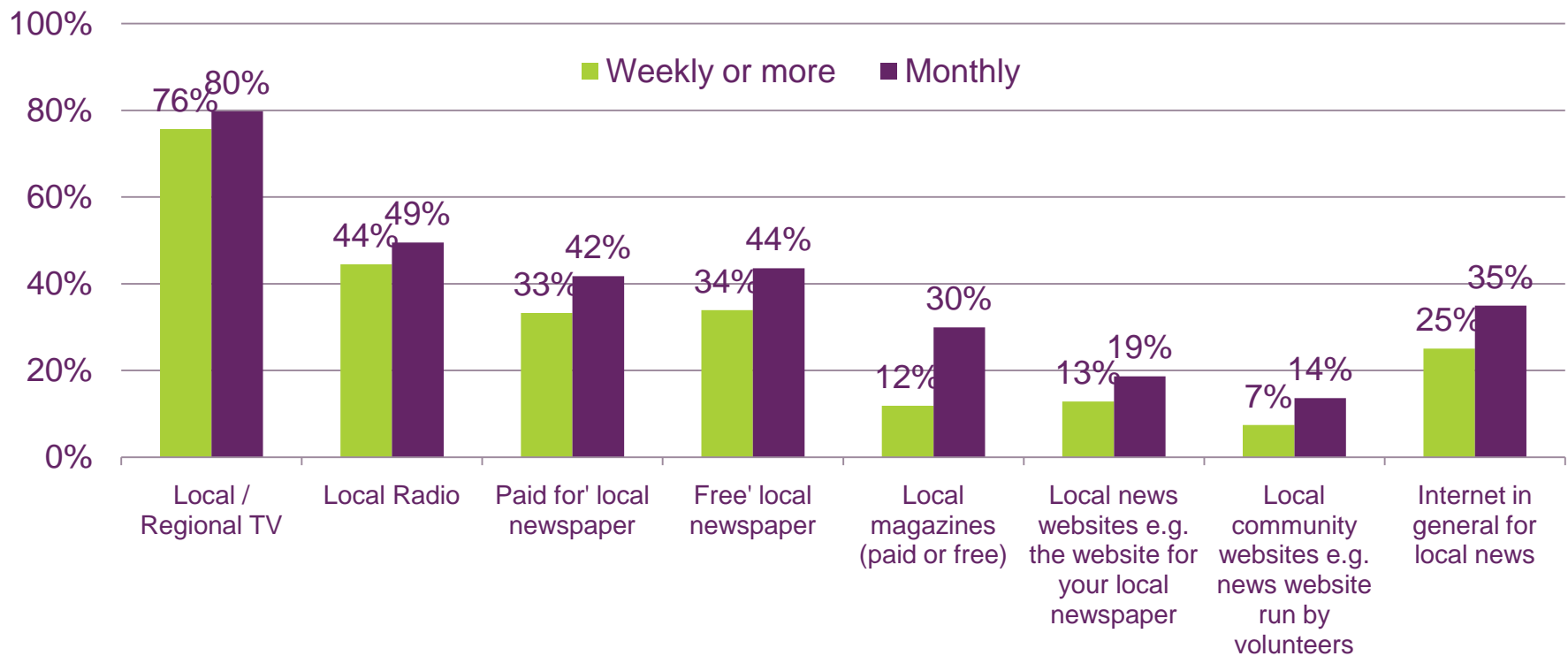
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download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

# Hyperlocal websites

# Figure 1.98

## Frequency of local media usage

Proportion of UK adults



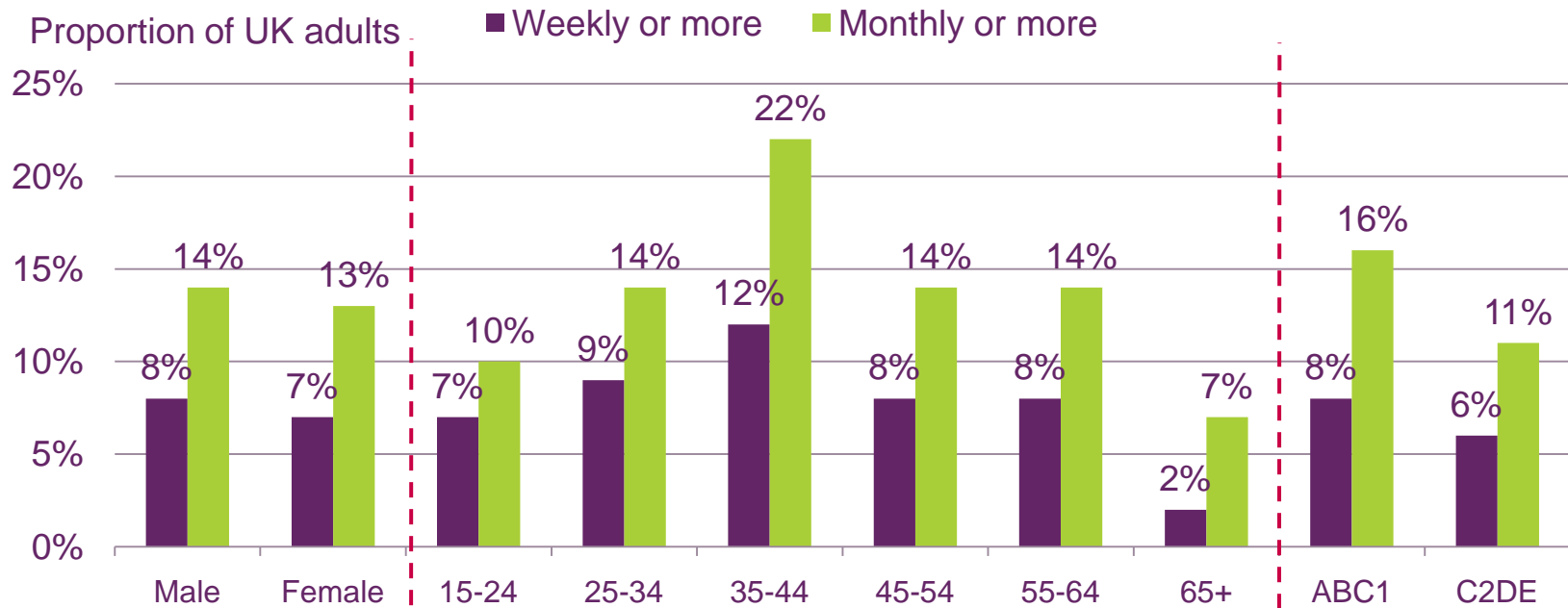
Source: Ofcom research, 2012

Q: I would now like you to think specifically about your local and regional media usage. By local, I mean the area in which you live. On average, how frequently do you use each of the following things?

Base: All UK adults aged 15+ (n=2452)

# Figure 1.99

## Frequency of local community websites



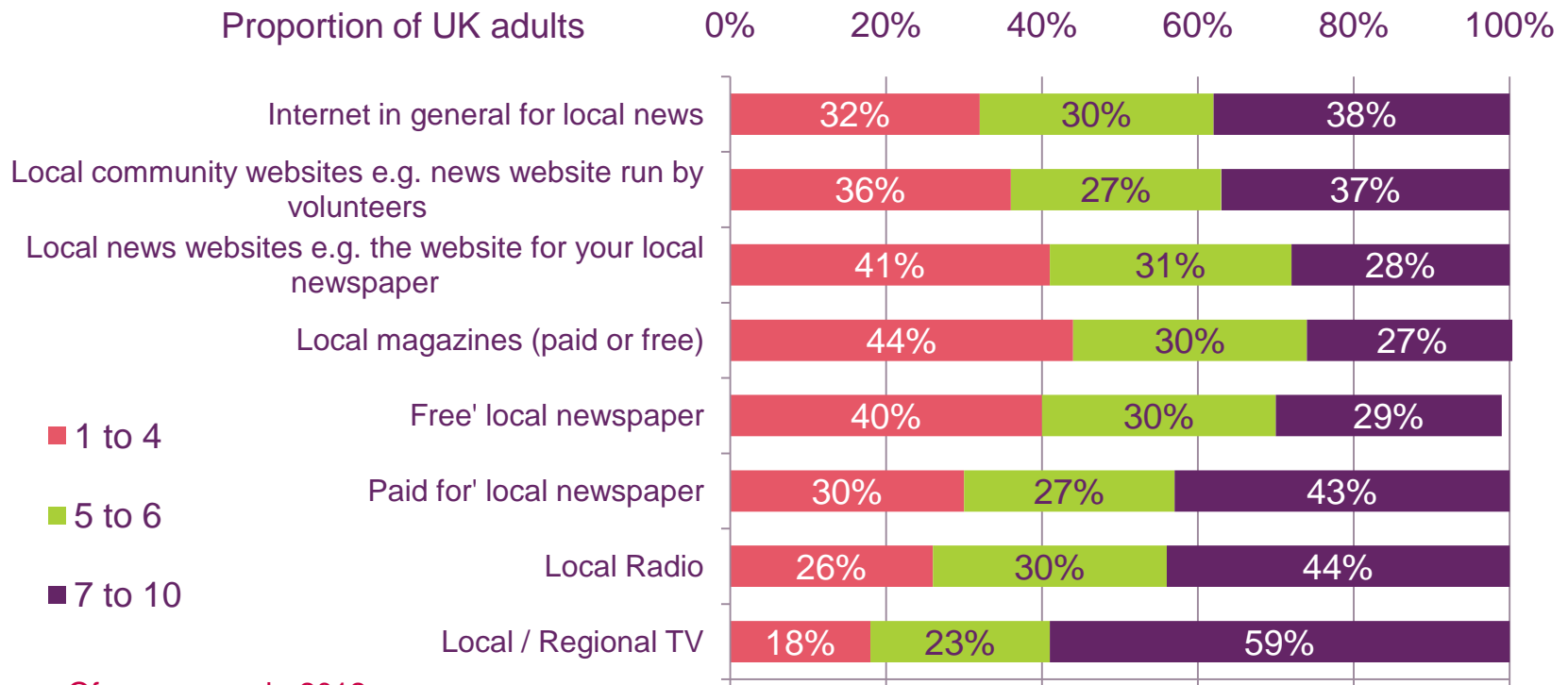
Source: Ofcom research, 2012

Q: I would now like you to think specifically about your local and regional media usage. By local, I mean the area in which you live. On average, how frequently do you use each of the following things?

Base: All UK adults aged 15+ who use local community websites

# Figure 1.100

## Importance of local media, among users of each service



Source: Ofcom research, 2012

Q: Using a scale of 1 to 10, where one is not at all important and you would not miss it if it were not available, and ten is extremely important and you would miss it if it were not available, how important are the following types of local media to you?

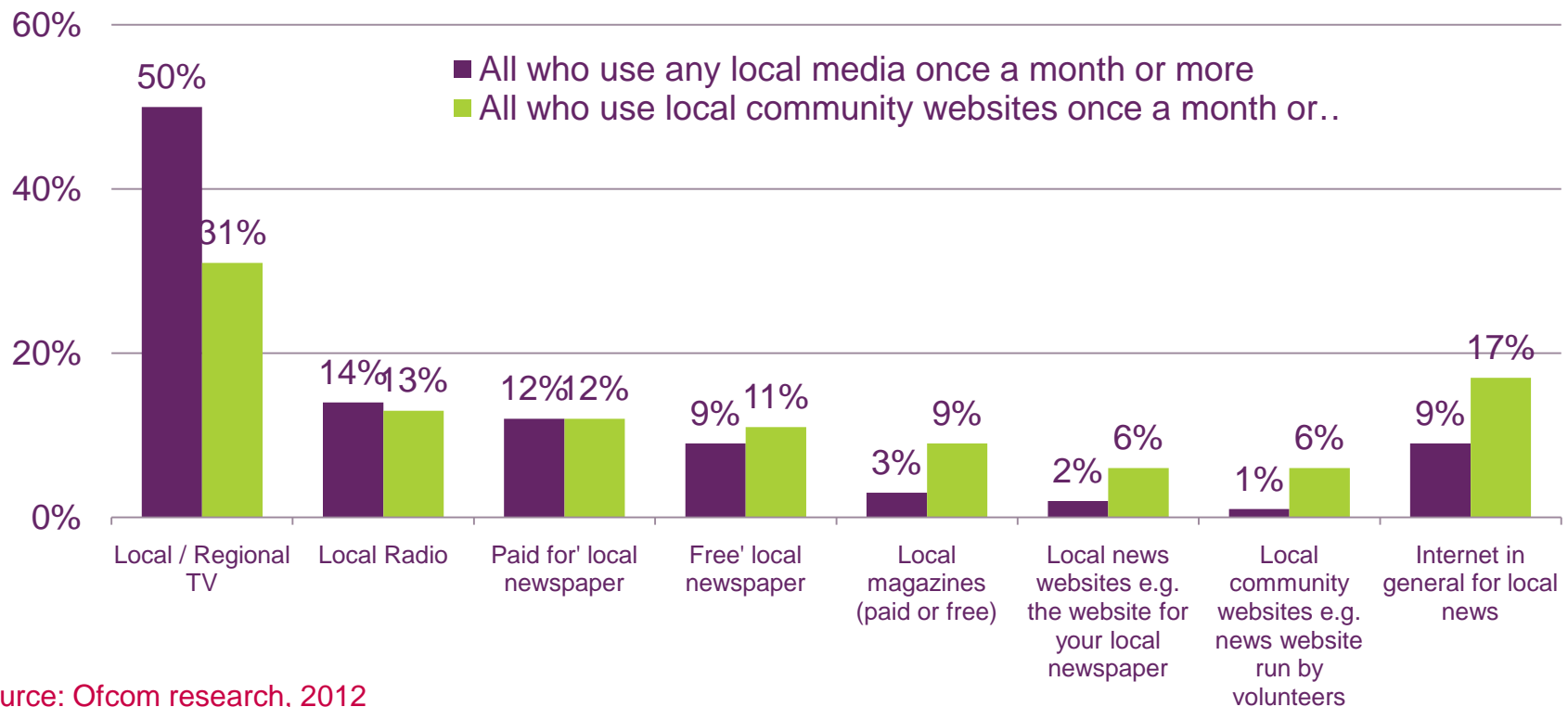
Base: All UK adults aged 15+ who use each medium



# Figure 1.101

## Most important local media source

Proportion of UK adults



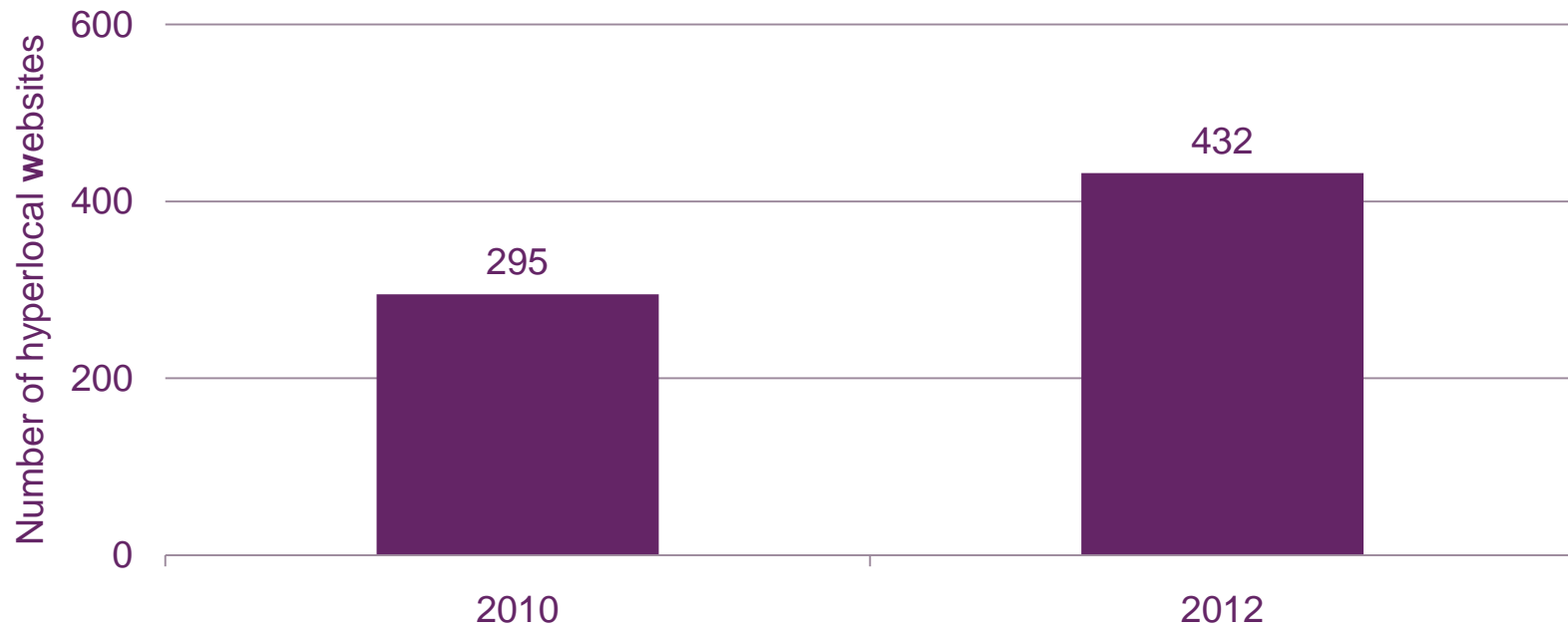
Source: Ofcom research, 2012

Q: Using a scale of 1 to 10, where one is not at all important and you would not miss it if it were not available, and ten is extremely important and you would miss it if it were not available, how important are the following types of local media to you?

Base: All UK adults aged 15+ (n=2024 for all media, n=328 for local community websites)

## Figure 1.102

### Active hyperlocal websites listed on Openly Local



Source: Openly Local/Birmingham City University (May 2012)



## Figure 1.103

### Location of hyperlocal websites in the UK

Nation / Region	No. sites
London	77
South West England	76
South East England	66
West Midlands	62
East England	38
North West England	32
Yorkshire and Humber	29
Wales	15
Scotland	13
East Midlands	12
North East England	3
Northern Ireland	3

Source: Openly Local/Ofcom/Birmingham City University

## Figure 1.104

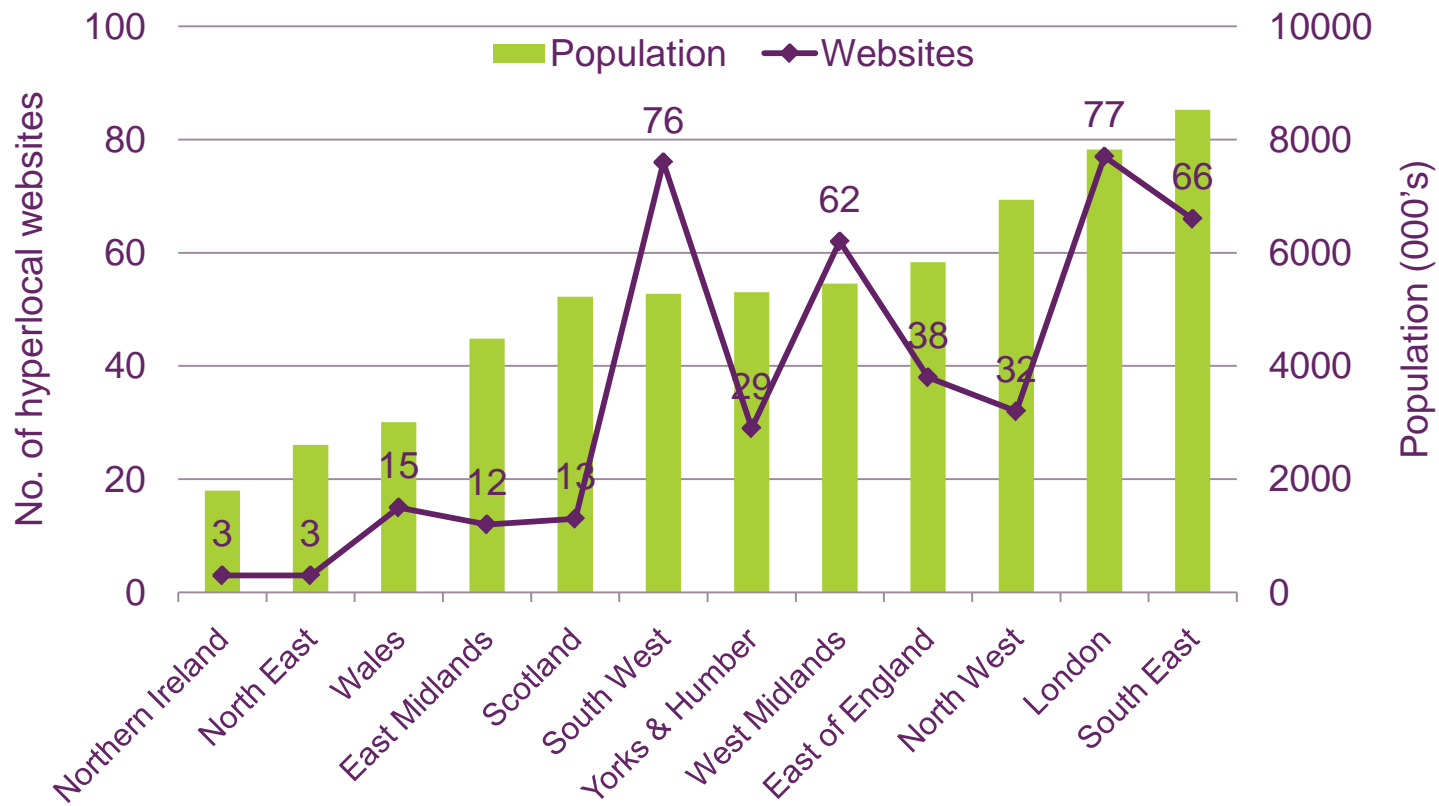
### Council areas with five or more hyperlocal websites

Council Name	No. sites
Birmingham City Council	28
Wiltshire Council	11
South Gloucestershire District Council	11
Bristol City Council	8
Ryedale District Council	7
City of Edinburgh	7
Stoke-on-Trent City Council	7
Leeds City Council	7
Cornwall Council	7
London Borough of Richmond upon Thames	7
Cardiff Council	6
London Borough of Lambeth	6
North Somerset Council	5
Mendip District Council	5
Cheshire East	5
Brighton and Hove City Council	5
London Borough of Lewisham	5
Greater London Authority	5

Source: Openly Local/Birmingham City University (May 2012)

# Figure 1.105

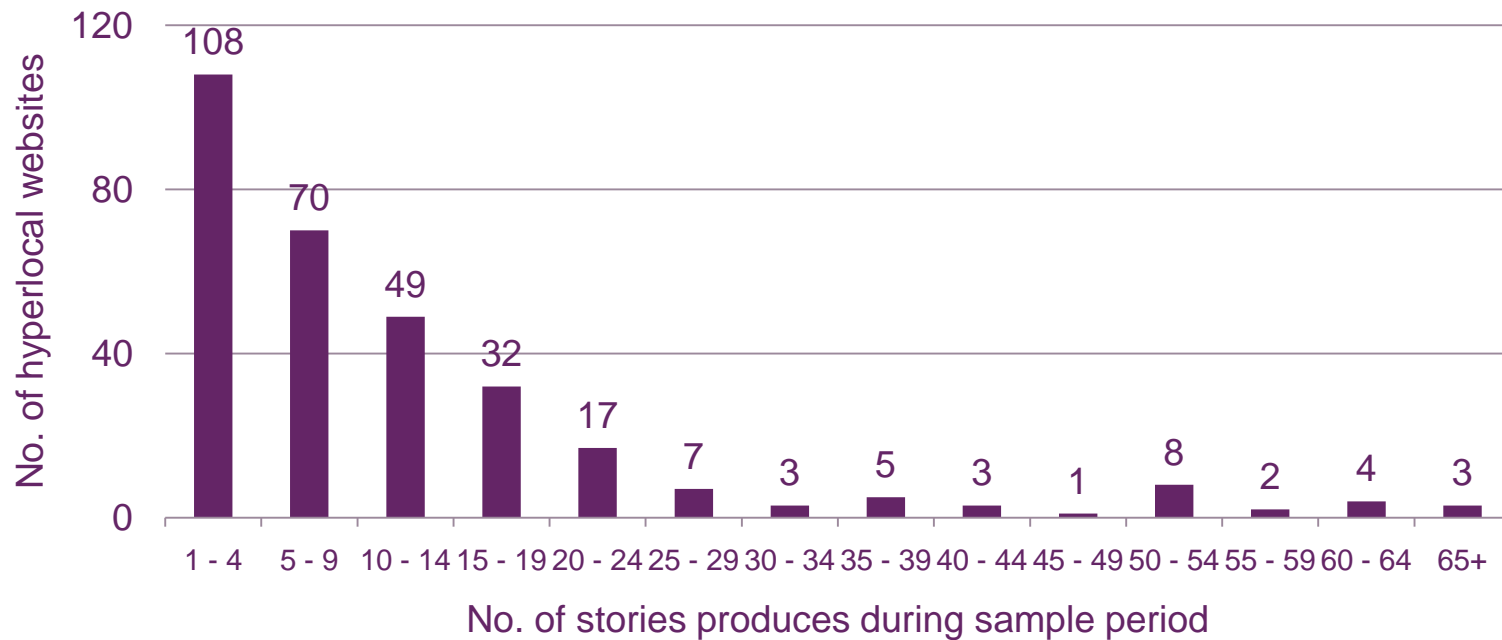
## Comparison of population and hyperlocal website provision



Source: Openly Local / Birmingham City University / ONS / Ofcom (May 2012)

# Figure 1.106

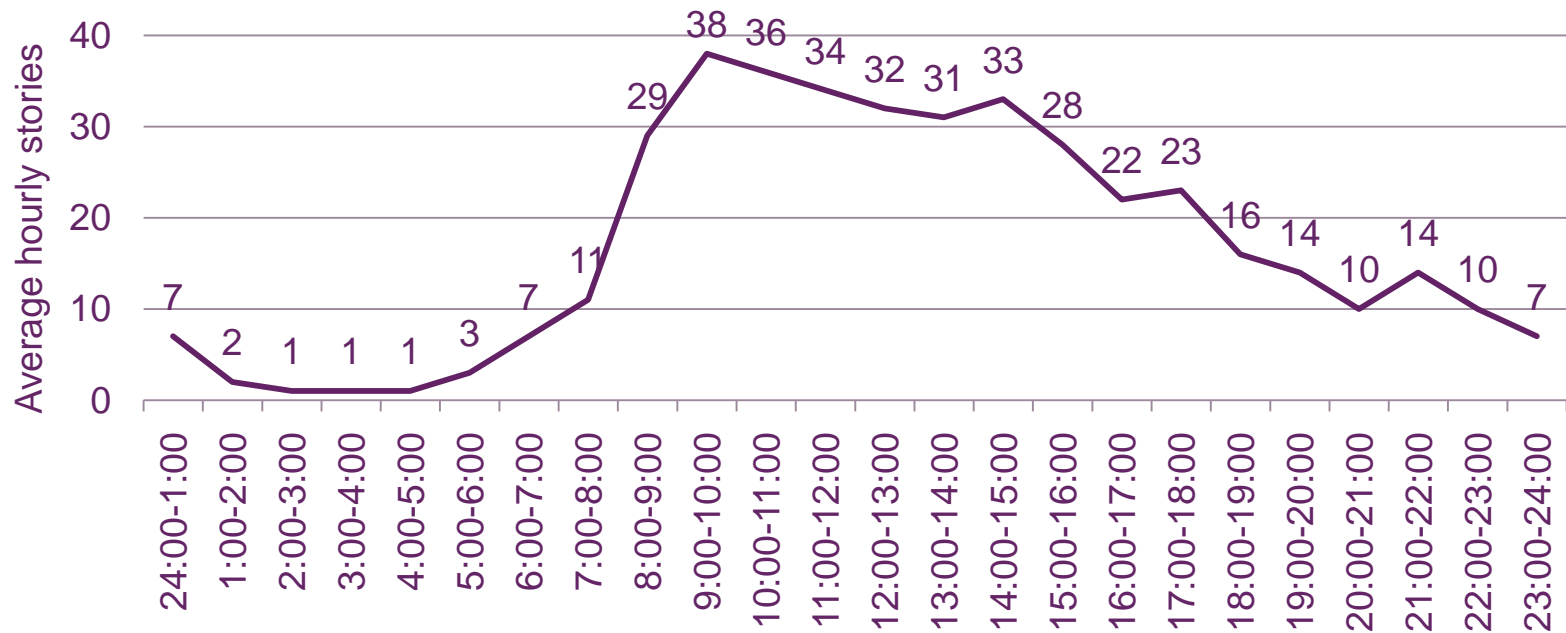
Stories produced by 312 hyperlocal websites during an 11-day sample period



Source: Ofcom / Birmingham City University (May 2012)

## Figure 1.107

Average hourly stories from hyperlocal sites excluding weekends



Source: Openly Local/Ofcom/Birmingham City University (May 2012)