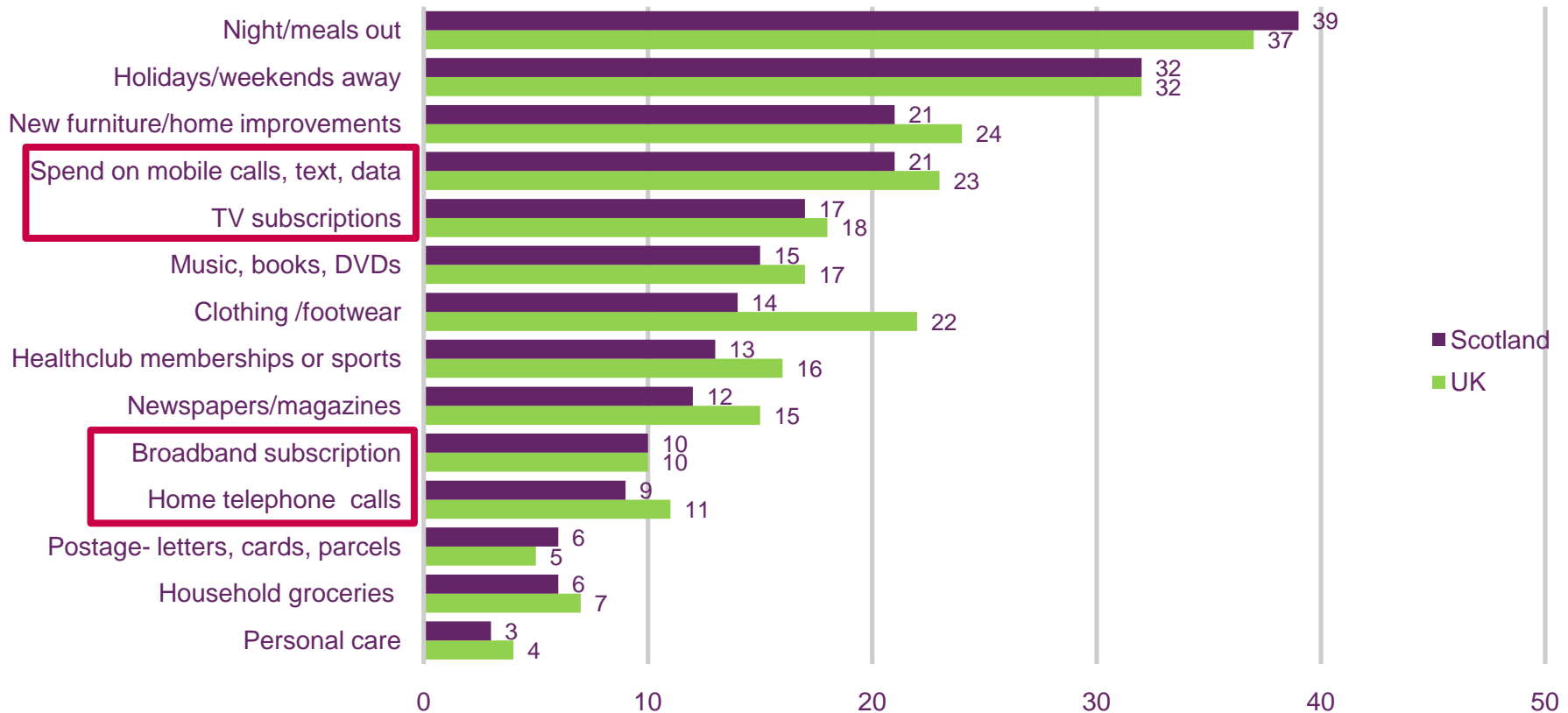


CMR Scotland chart pack 2012

Scotland's communication market

Items and services where consumers would be most likely to cut their spending

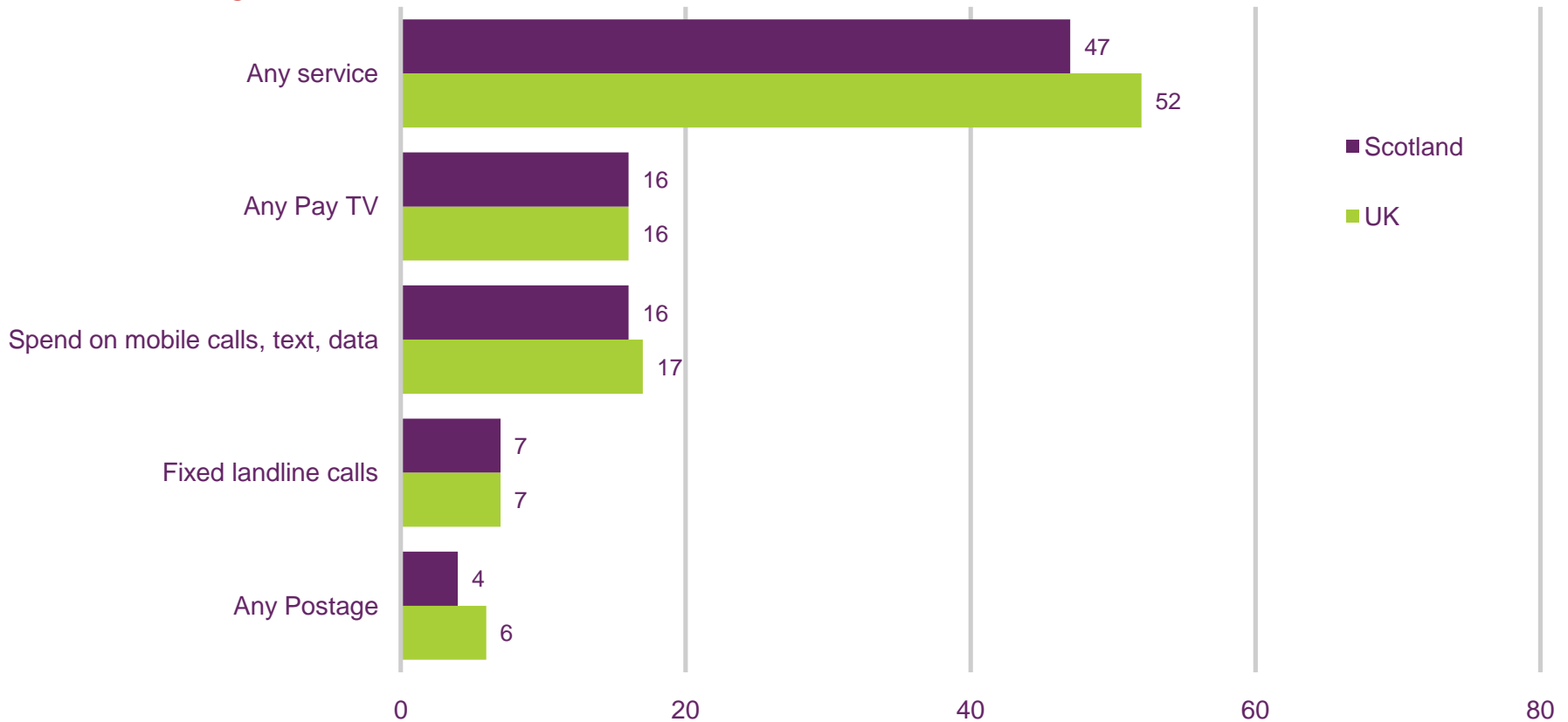


Q7/8 combined: If you were forced to cut back spending, which of the following items would you be MOST likely to spend less on? (multimode)

Source: Ofcom Attitudes toward spending research, 2012

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

Single most likely communications service to cut spending on

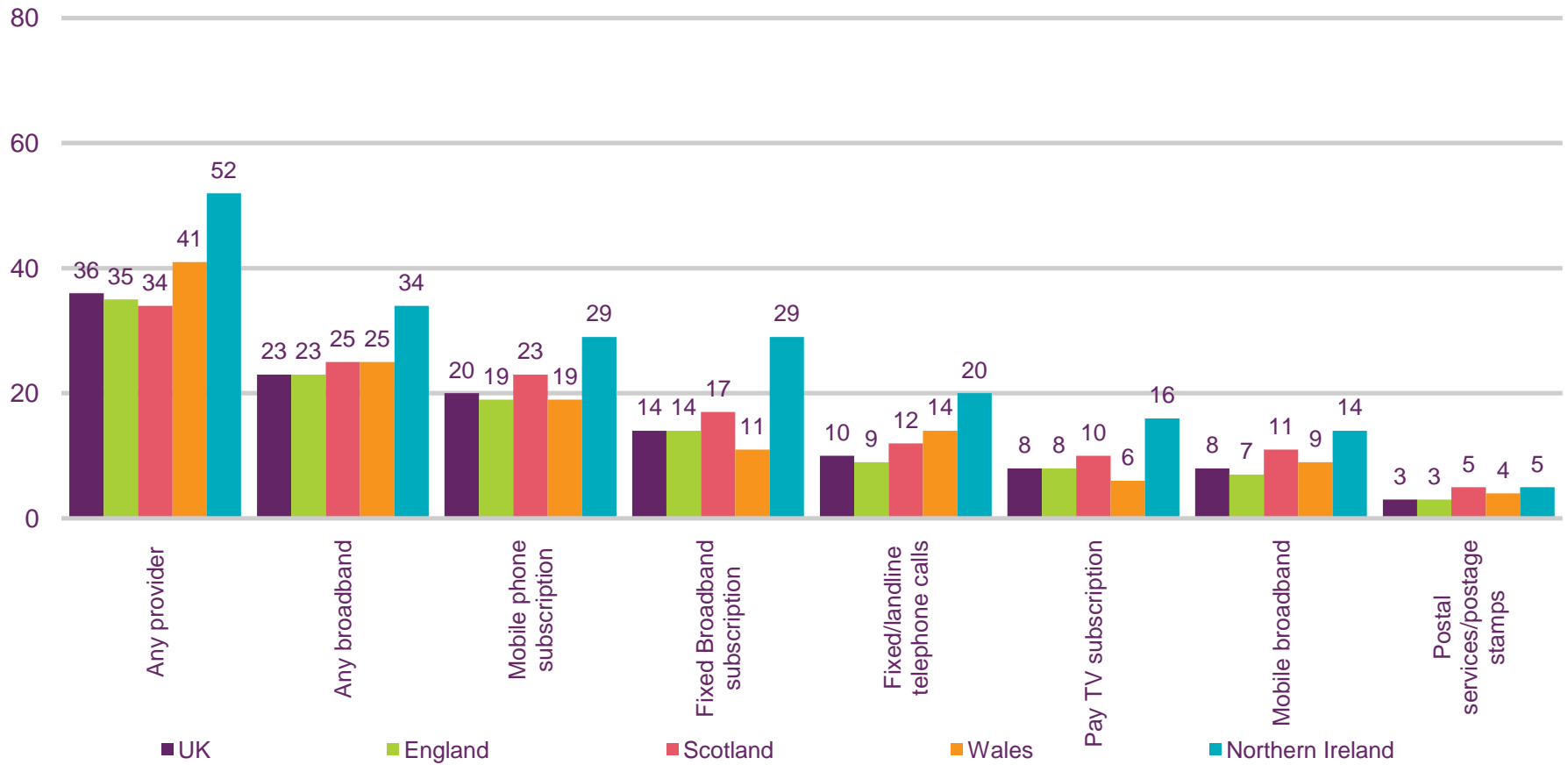


Q8/9: And which ONE of the following services would you be MOST LIKELY to cut back spending on? (single choice)

Source: Ofcom Attitudes toward spending research, 2012

Base: UK adults who have/use named services n = 2063

Services consumers are more likely to shop around for than a year ago



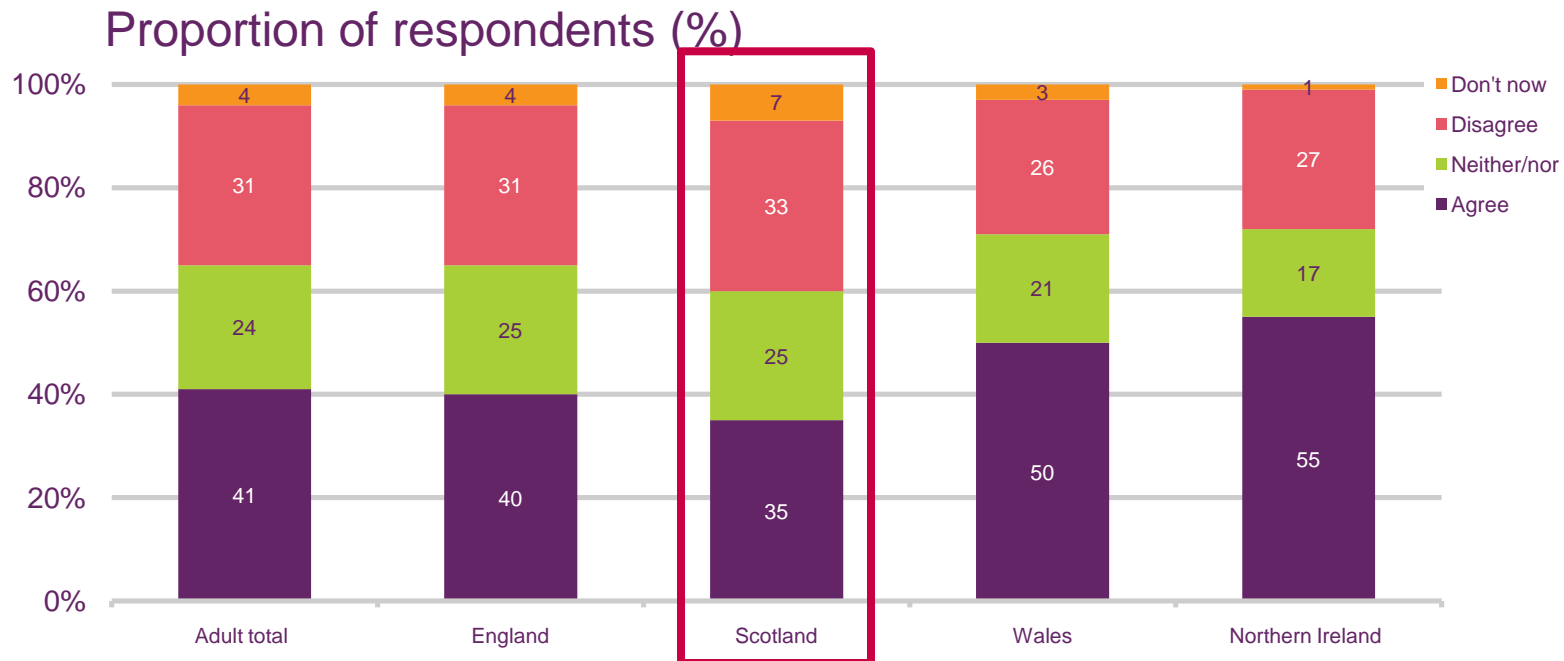
Q12: And which of the following are you MORE LIKELY to shop around for than you were 12 months ago? (Multi choice)

Source: Ofcom Attitudes toward spending research, 2012

Base: All UK adults aged 16+ n = 2124

Consumers' agreement/disagreement that they are more/ likely to take communications services in a bundle

I'm more likely to consider purchasing TV , broadband and telephone services in a package from the same supplier as it offers better value for money

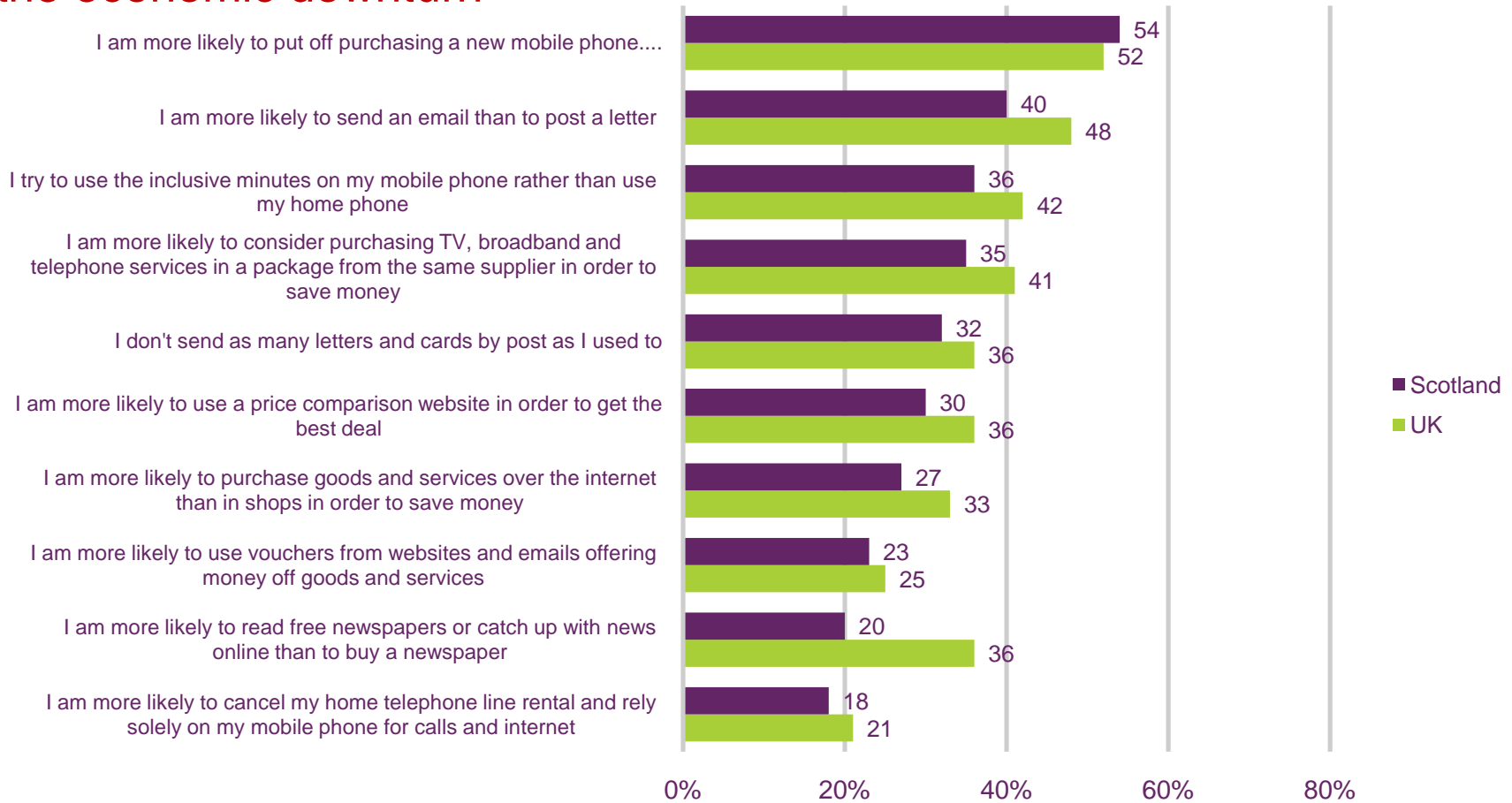


Source: Ofcom Attitudes to spending omnibus research, 2012

Q10_01: Here are some things other people have said about how the economic downturn has changed their spending on TV, broadband, mobile and how telephone services, Please tell me the extent you agree or disagree with the following statements?

Total UK adults (n = 2124)

Consumers' attitude to spending on communication services in the economic downturn

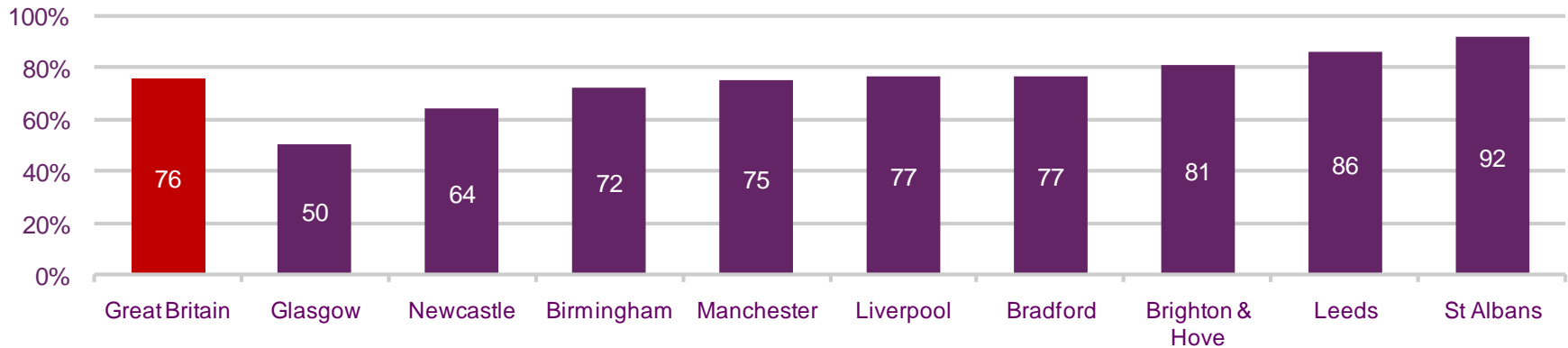


Q10: Here are some things other people have said about how the economic down turn has changed their spending on TV, broadband, mobile and land telephone services. Please tell me to what extent you agree or disagree with the following statements

Source: Ofcom Attitudes toward spending research, 2012

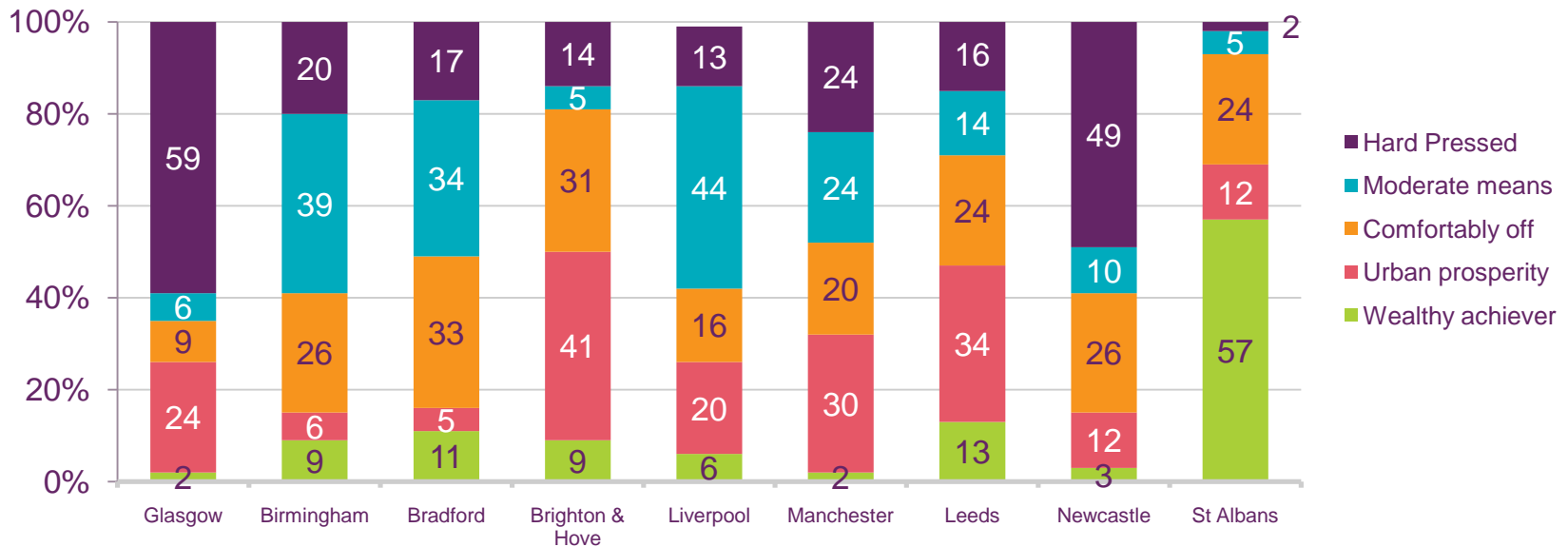
Base: Adults in Scotland aged 16+ n = 182

Fixed broadband take-up, by city



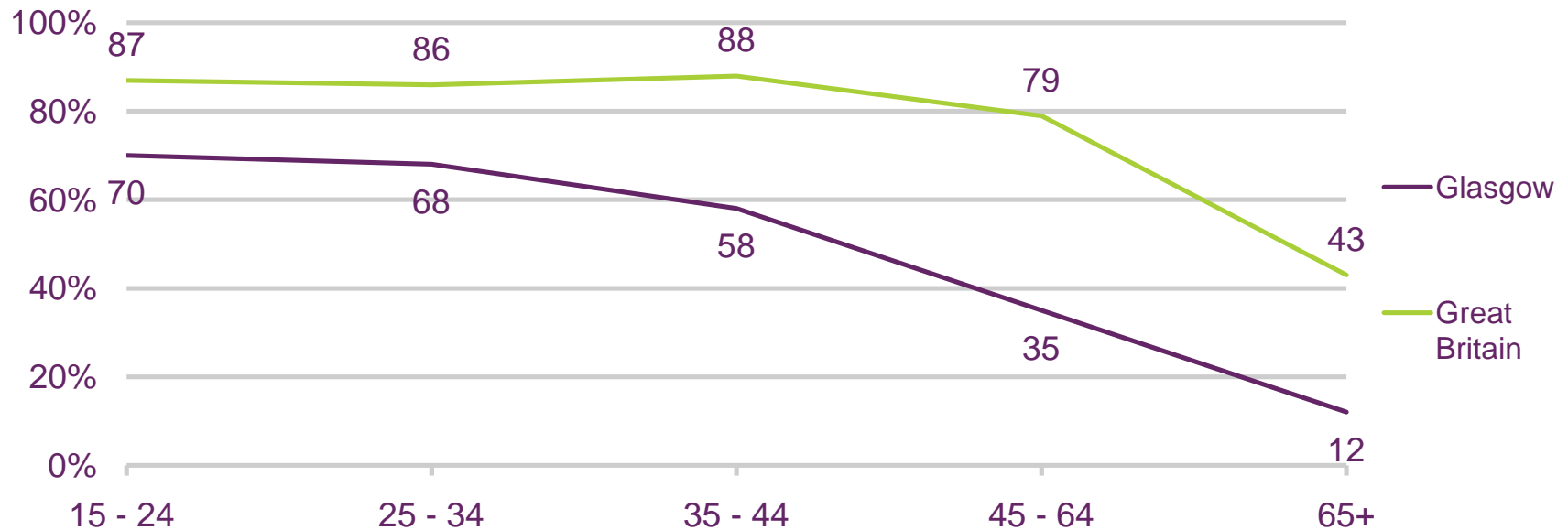
Source: British Population Survey
 Base: GB adults aged 15+, n = 62, 669

City demographic profile comparisons



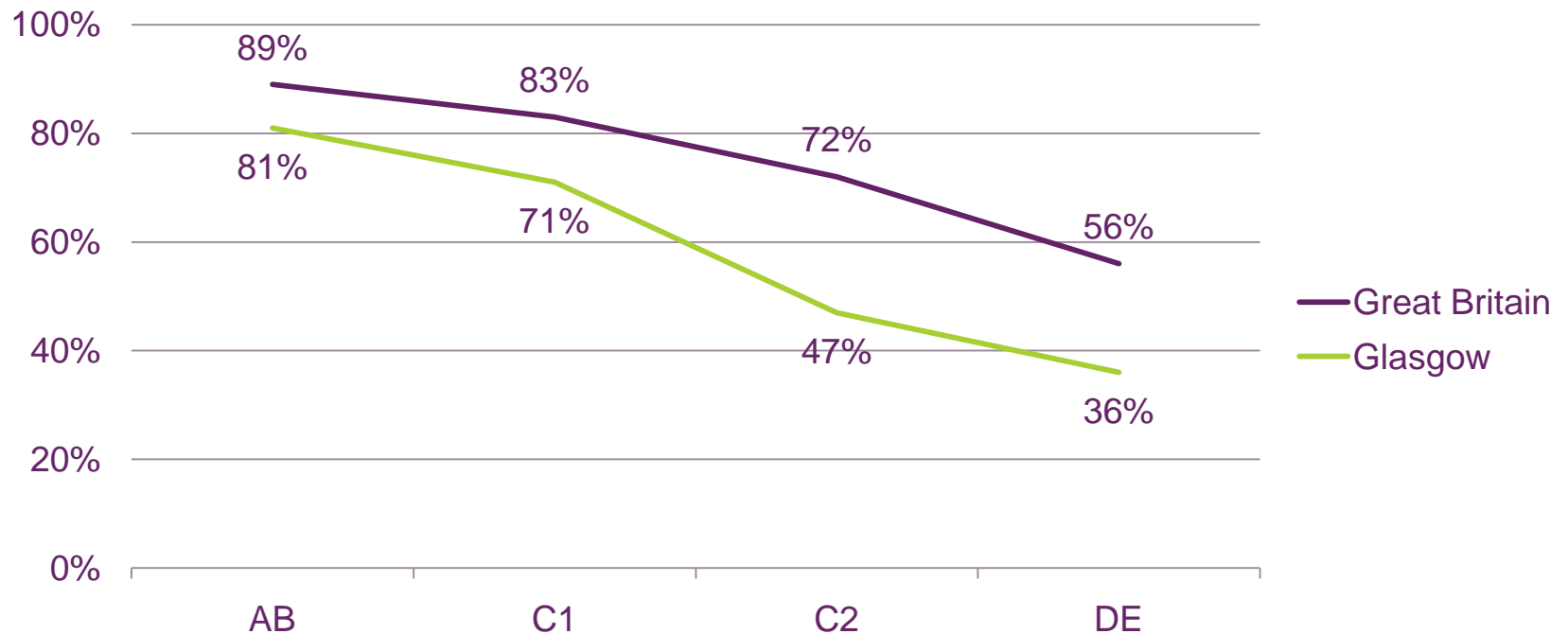
Source: CACI

Fixed broadband take-up, by age group



Source: British Population Survey
 Base: GB adults aged 15+, n = 62, 669

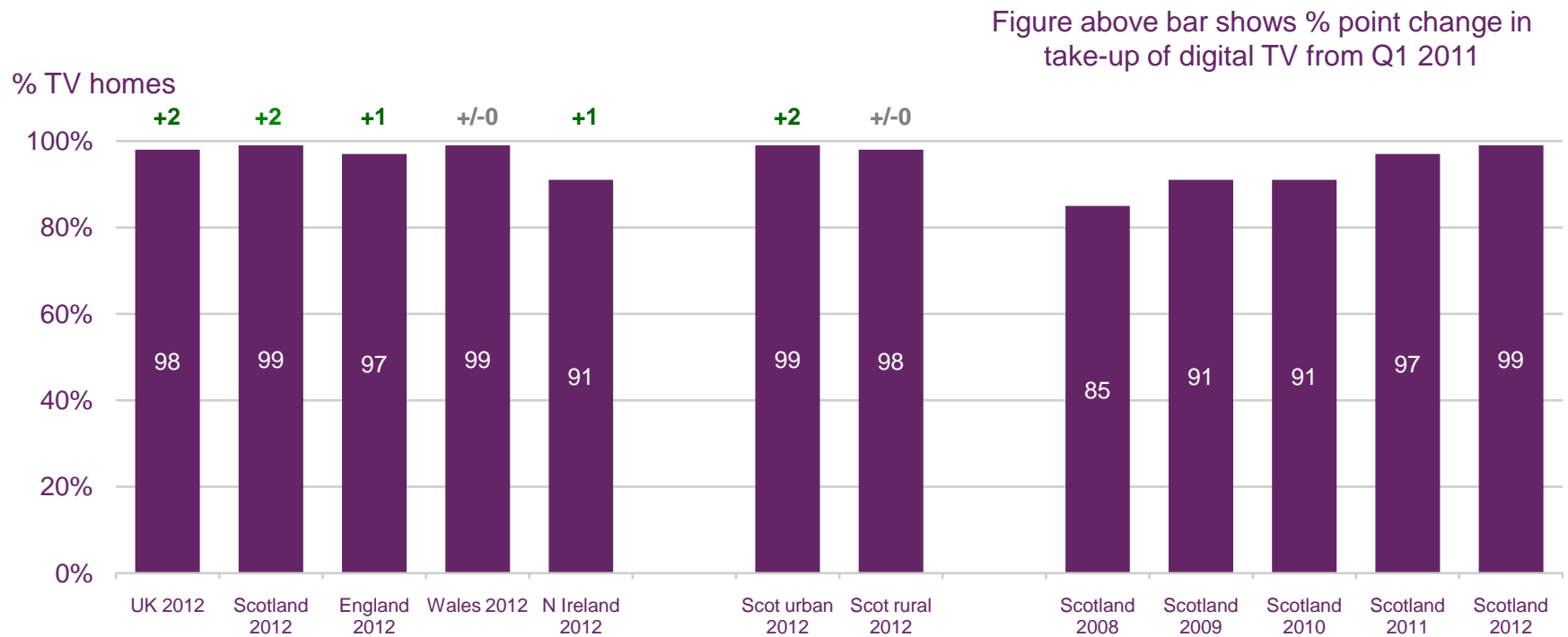
Fixed broadband take-up, by socio-economic group



Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 594 Glasgow)

Television and audio-visual content

Digital television take-up in Scotland

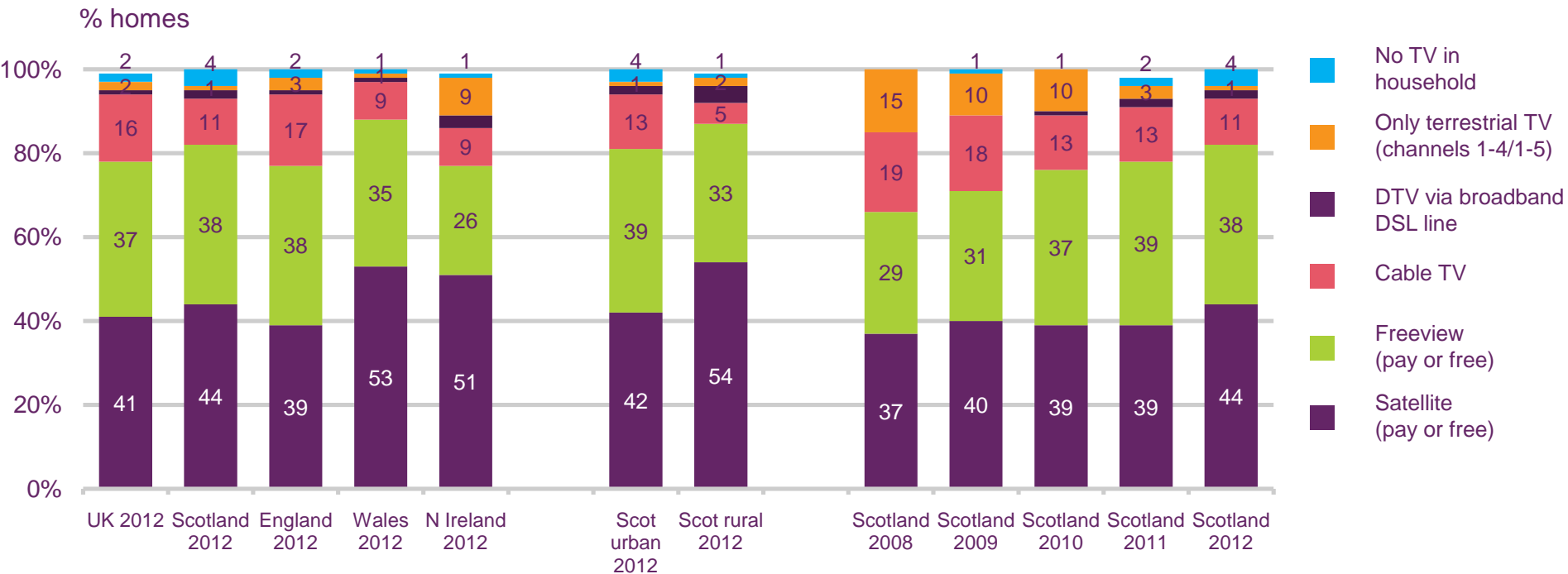


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a TV in household (n = 3713 UK, 489 Scotland, 2214 England, 508 Wales, 502 Northern Ireland, 254 Scotland urban, 235 Scotland rural, 916 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011, 489 Scotland 2012)

Main set TV share in Scotland, by platform

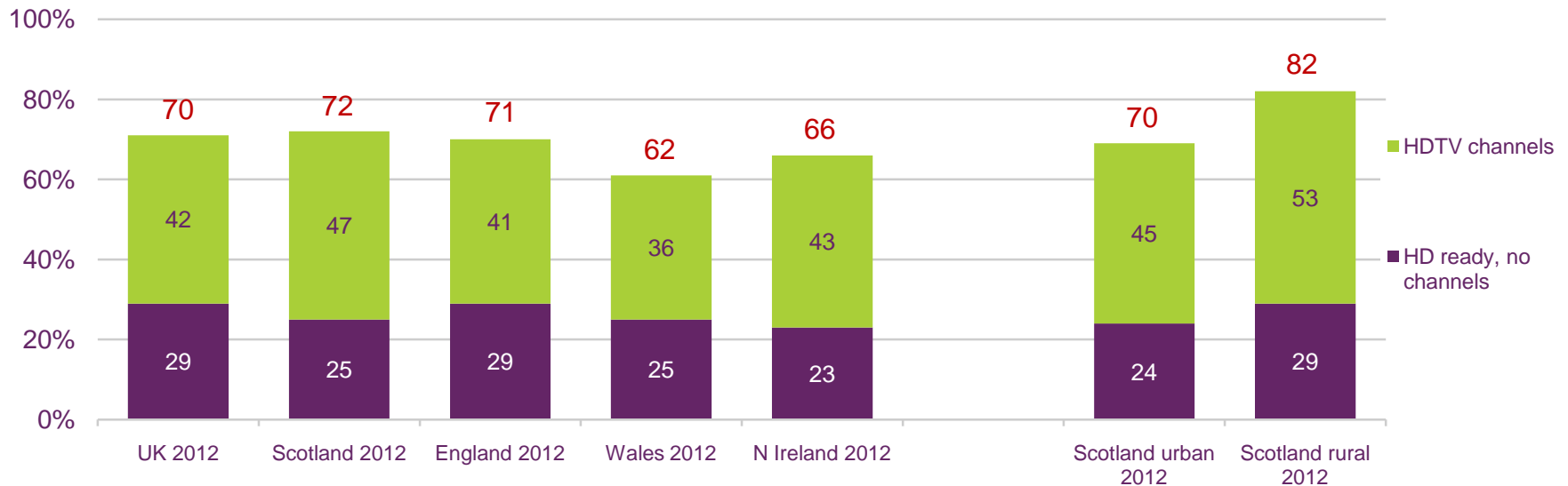


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Proportion of homes in Scotland with HD-ready TV sets and HDTV



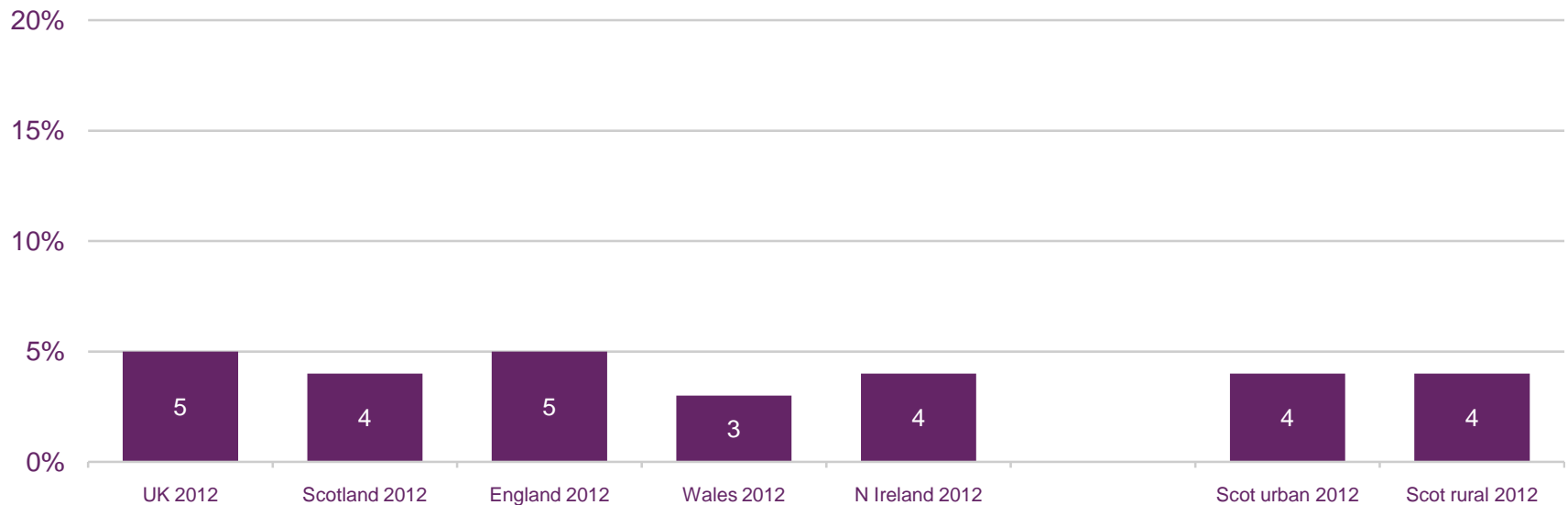
QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural)

Smart TV take-up in Scotland

% TV homes

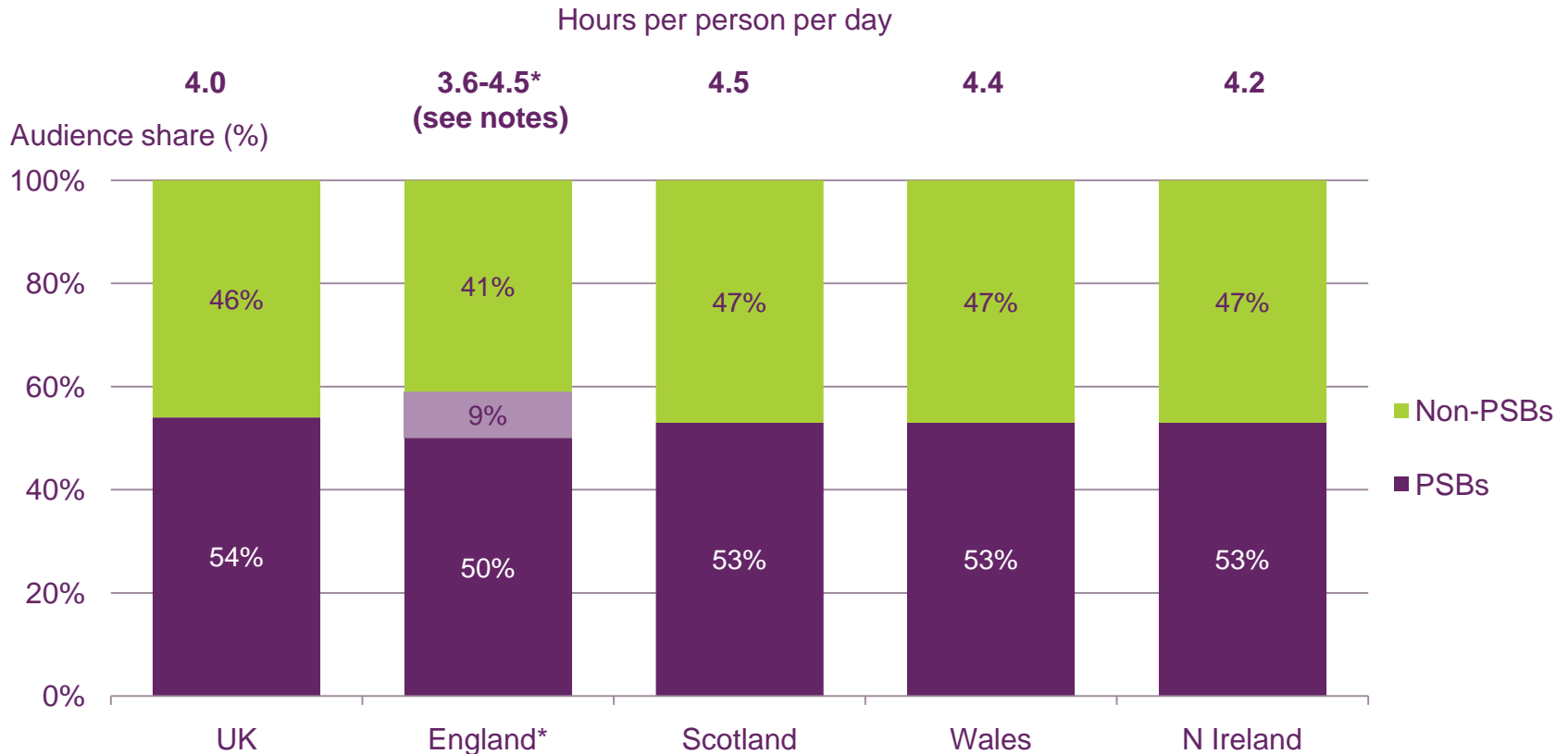


QH18. Are any of your TV sets “Smart TVs”? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a TV in household (n = 3713 UK, 489 Scotland, 2214 England, 508 Wales, 502 Northern Ireland, 254 Scotland urban, 235 Scotland rural, 916 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011, 489 Scotland 2012)

Hours of daily TV viewing, by nation, 2011

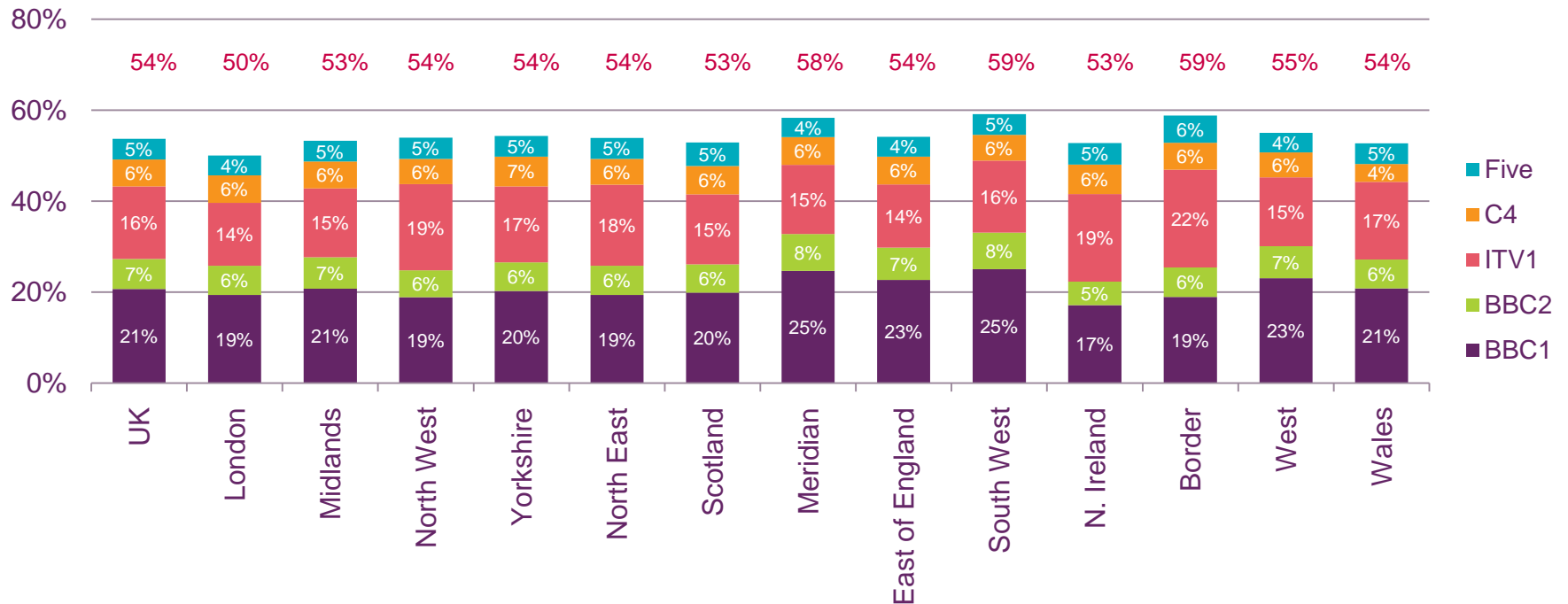


Source: TV = BARB. Based on all individuals (aged 4+). PSBs = BBC One, BBC Two, ITV1, C4, Five.

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

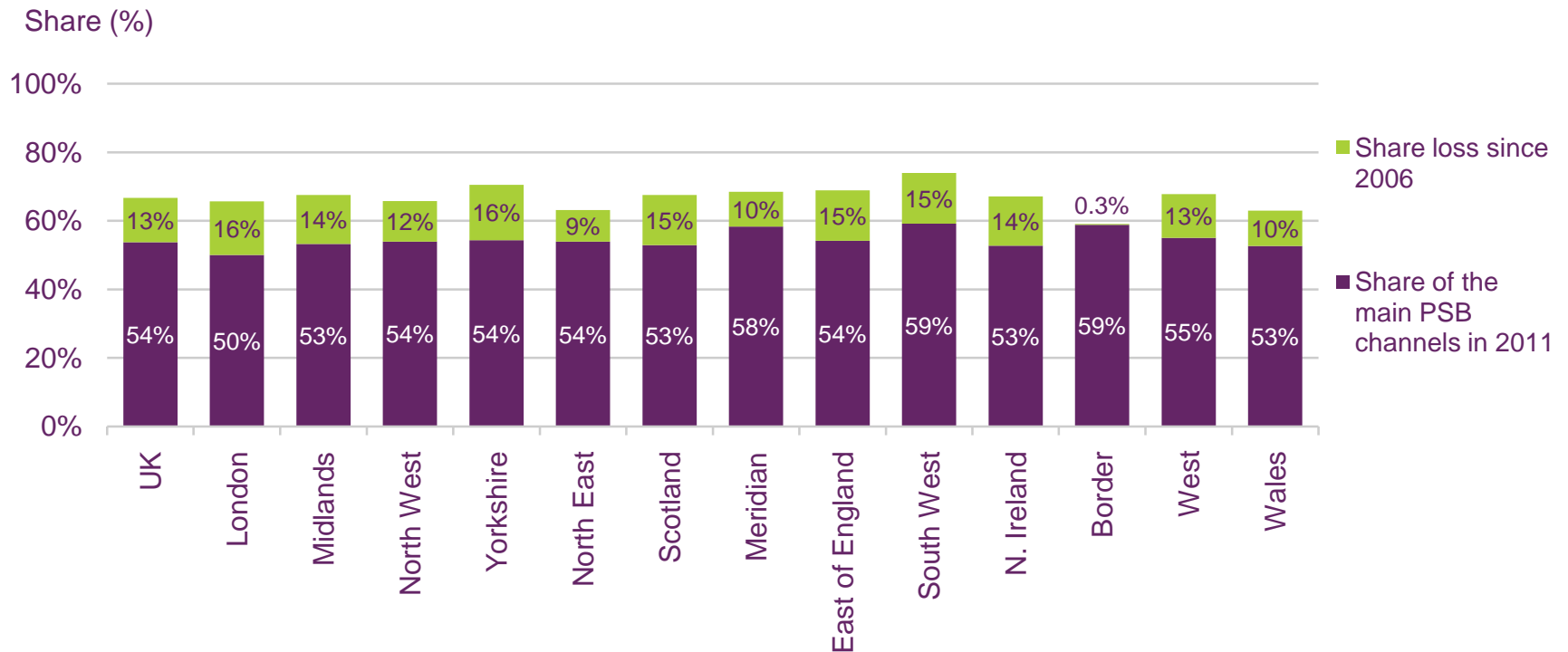
Share of the five main PSB channels in all homes, 2011

Audience share (%)



Source: BARB, all individuals (4+)

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

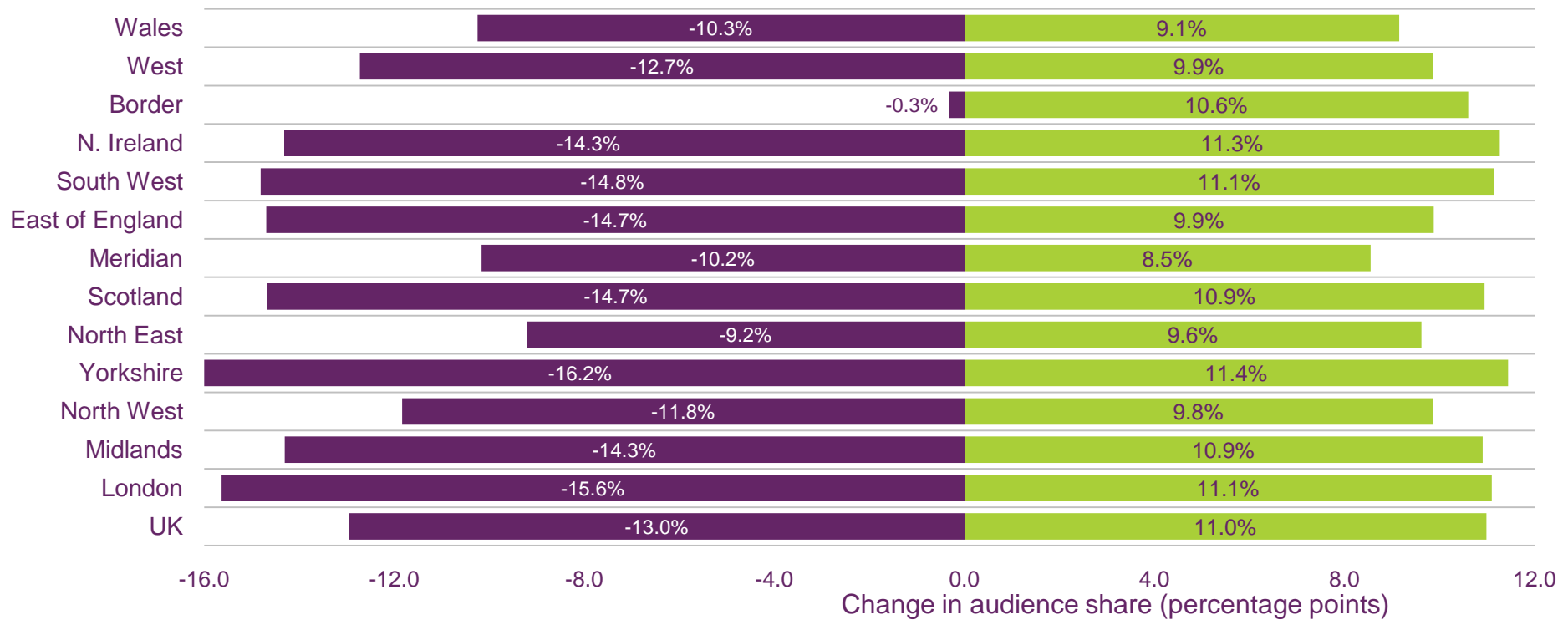


Source: BARB, all individuals (4+)

Note : In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

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

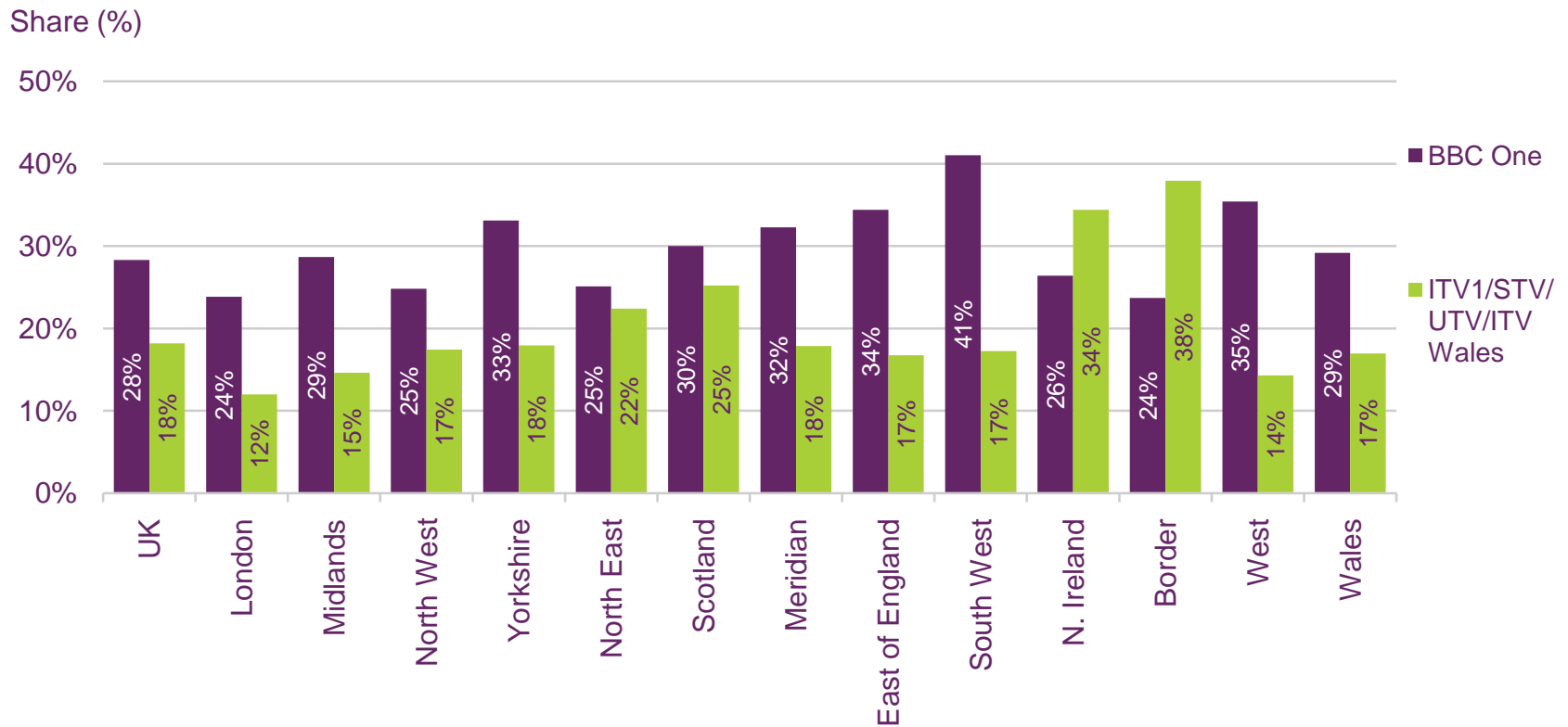
■ Change in total share of five main PSB channels since 2006 ■ Change in total share of the PSB portfolio channels since 2006



Source: BARB, all individuals (4+)

Notes: i) 'PSB portfolio channels' includes all the main PSB's multichannel channels (except for the five terrestrial channels). ii) In 2010 a new BARB panel was introduced, including the re-defining of boundaries. Therefore, pre and post panel change data should be compared with some caution.

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

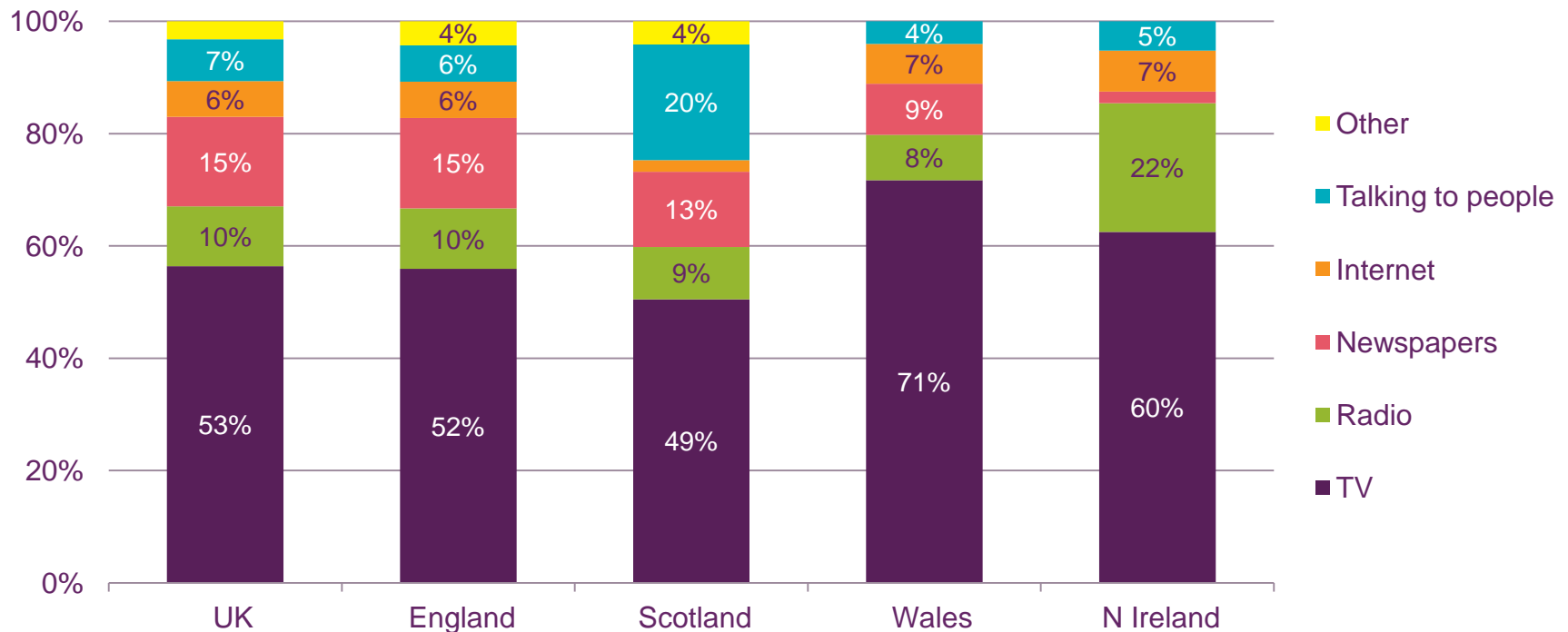


Source: BARB, all individuals (4+)

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

Sources of local news for each nation

‘Can you tell me what, if anything, is your main source of news about what is going on in your own local area’



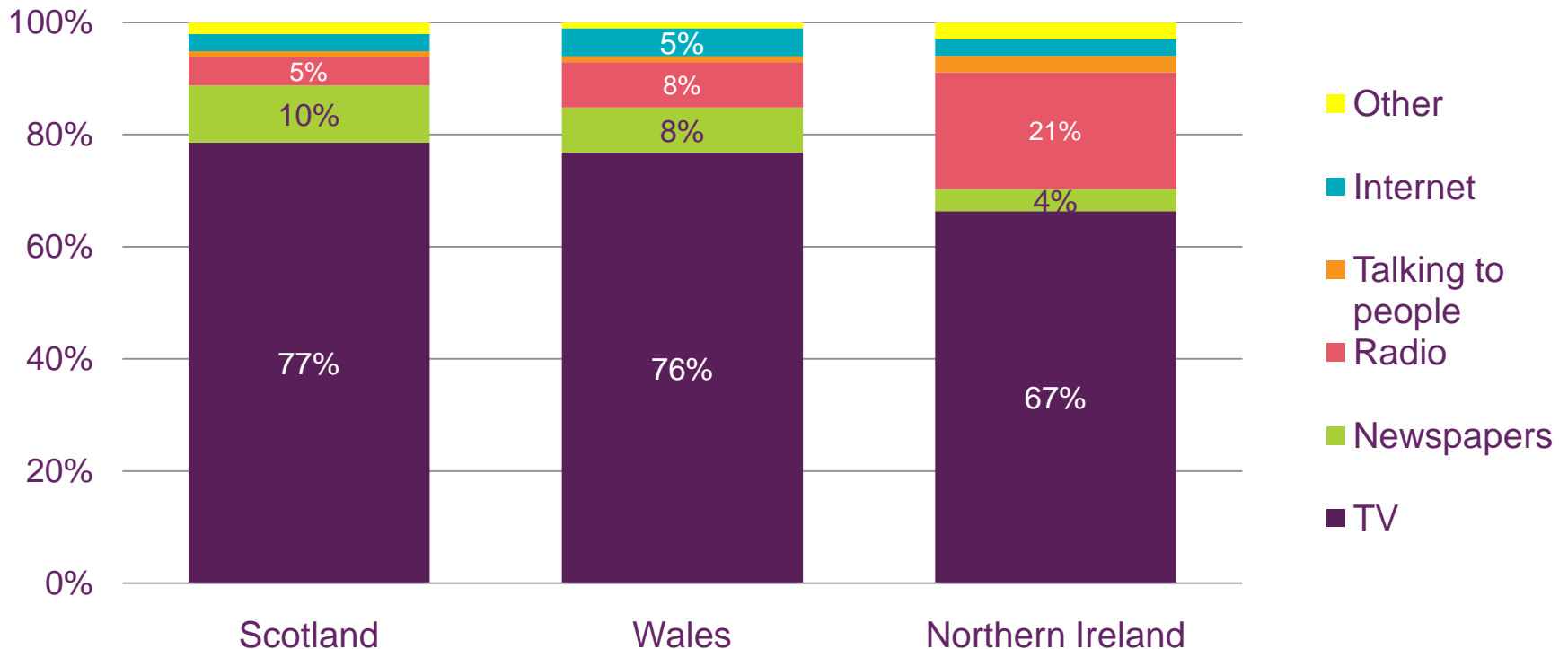
Source: Ofcom Media tracker 2011.

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

Only responses $\geq 4\%$ labelled

Sources of Nations news for each nation

‘Can you tell me what, if anything, is your **main** source of news about what is going on in [Scotland, Wales, Northern Ireland]?’

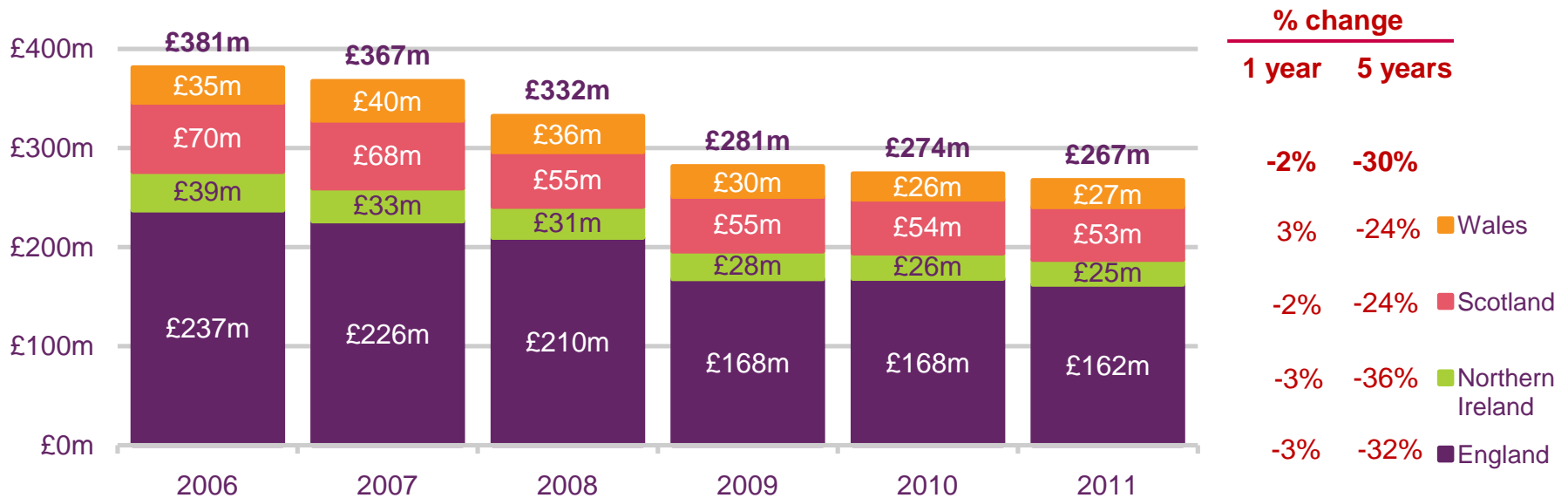


Source: Ofcom Media tracker.

Base: All respondents in Scotland (172), Wales (107), Northern Ireland (106). Only responses $\geq 4\%$ labelled.

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

Spend



Source: Broadcasters. All figures expressed in 2011 prices.

Note: Spend data for first-run originations only. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for spend on BBC ALBA or BBC spend on S4C output.

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

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

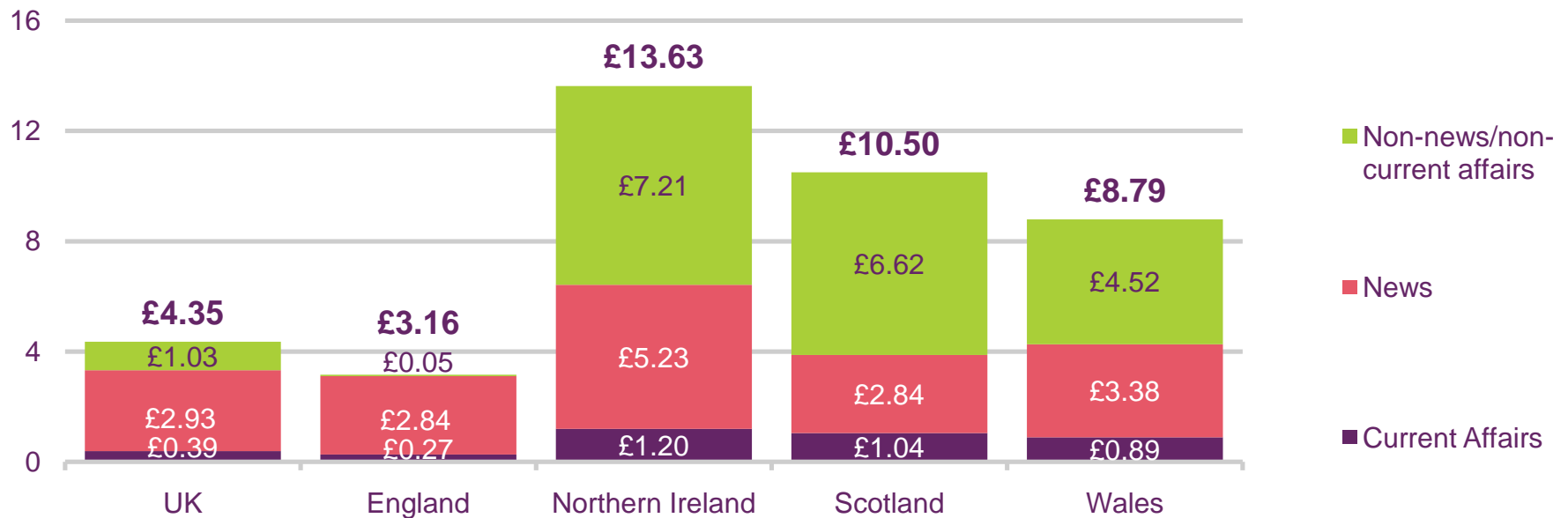
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	-3%	-29%	-5%	-30%	-3%	-36%	-1%	-23%	3%	-24%

Source: Broadcasters. All figures expressed in 2011 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for spend on BBC ALBA or BBC spend on S4C output.

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

Spend per head (£ per head)



Source: Broadcasters. All figures expressed in 2011 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC ALBA or BBC spend on S4C output.

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

2011 total first-run originated hours

11,648 hrs

6,763 hrs

931 hrs

2,938 hrs

1,016 hrs

Change since 2010

6%

0%

-8%

32%

1%

Change since 2006

-1%

-14%

-17%

86%

-22%



Source: PSB returns

Note: Hours data for first-run originations only. Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not include total hours for BBC ALBA or BBC hours on S4C output.

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

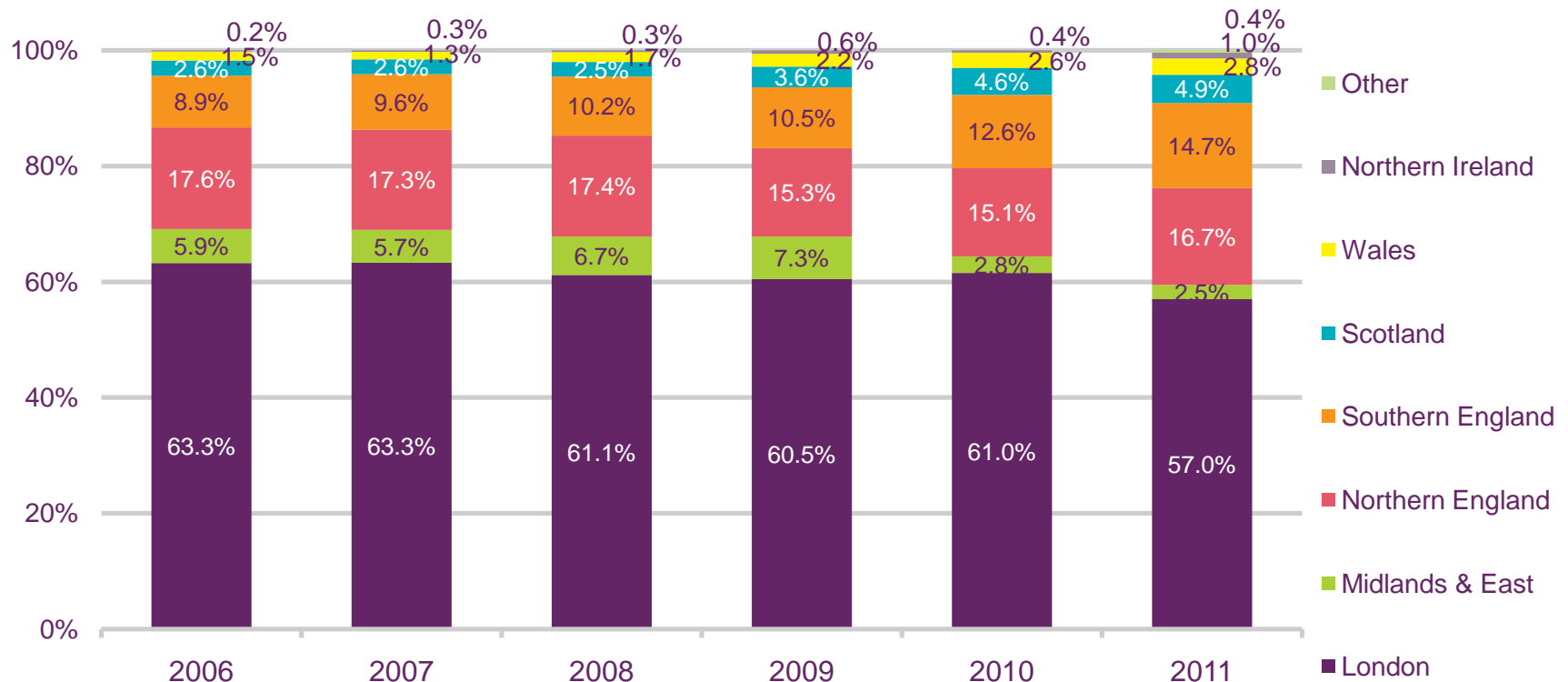


Source: Broadcasters. All figures expressed in 2011 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. This does not account for total spend on BBC ALBA or BBC spend on S4C output.

Expenditure on network originated programming - out-of-London production

Percentage of production by value



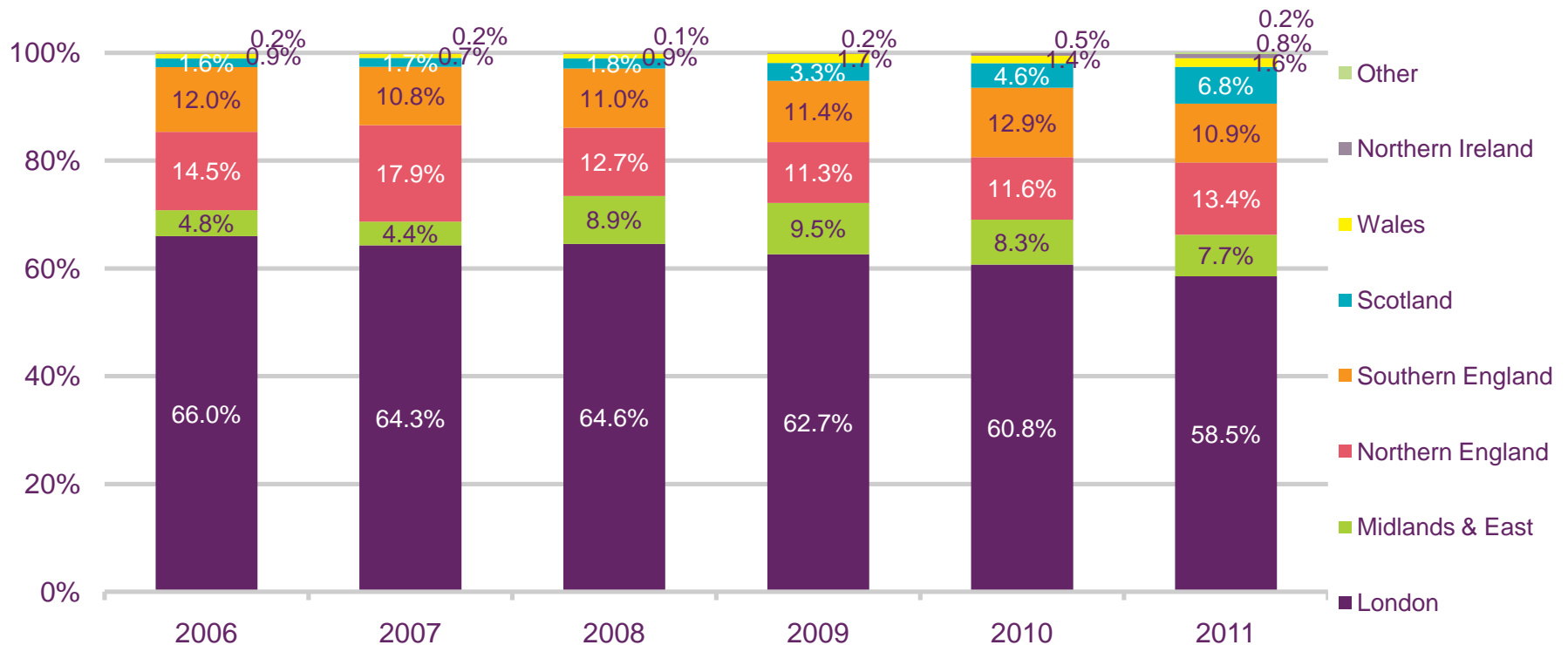
Source: Ofcom/broadcasters

Note: A new category 'Other' has been created for Regional Productions from London Producers which do not meet both 70% of spend and 50% of talent in any one particular Macro Region' See

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

Volume of network originated programming - out-of-London production

Percentage of production by volume

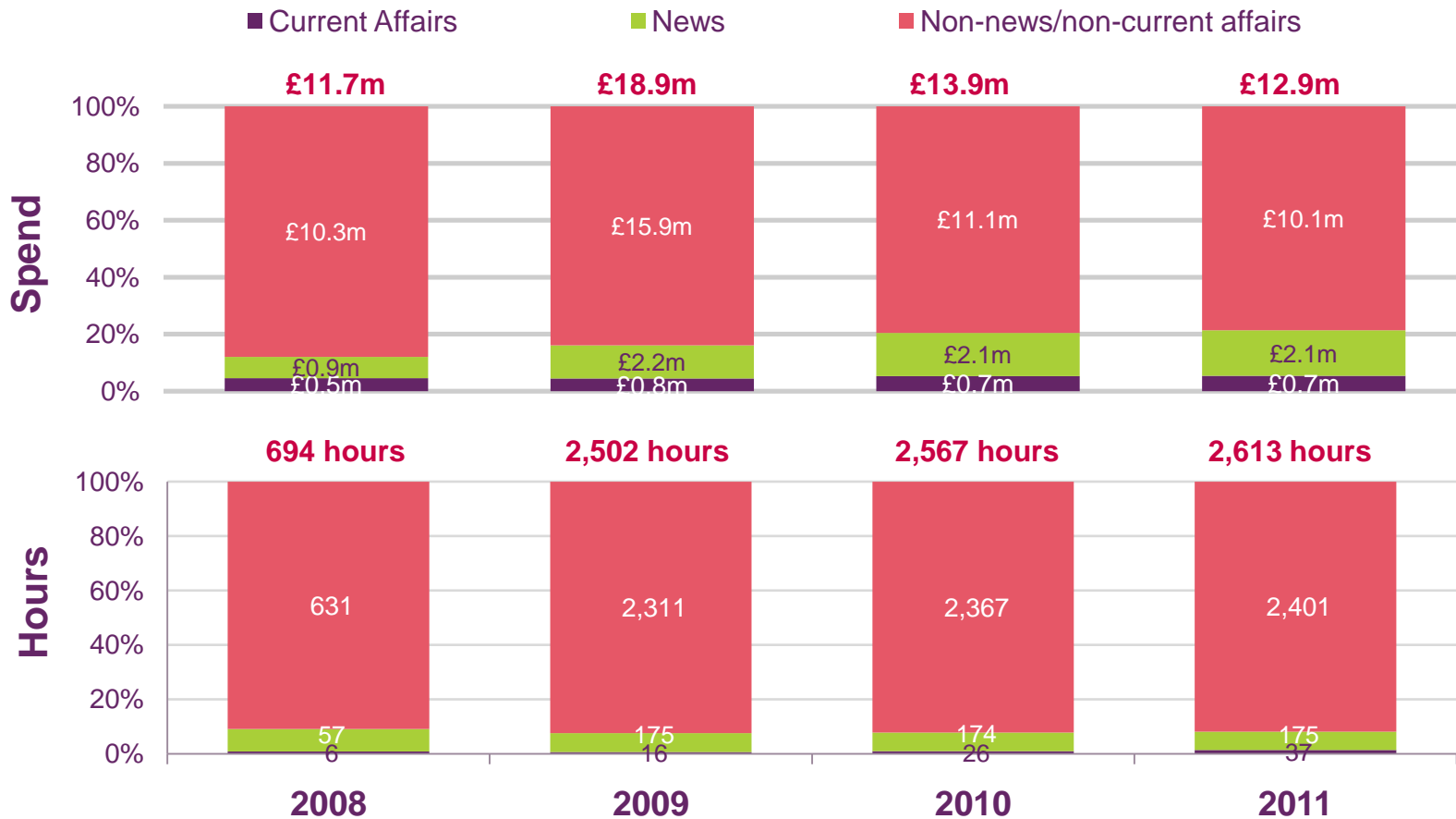


Source: Ofcom/broadcasters

Note: A new category 'Other' has been created for Regional Productions from London Producers which do not meet both 70% of spend and 50% of talent in any one particular Macro Region' See

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

BBC ALBA: Total hours and spend, 2008 – 2011



Source: BBC, total hours and spend by the BBC and MG ALBA. All figures expressed in 2011 prices. BBC ALBA launched in 2008.

Radio and audio content

Number of community radio stations on air, 2006-2007

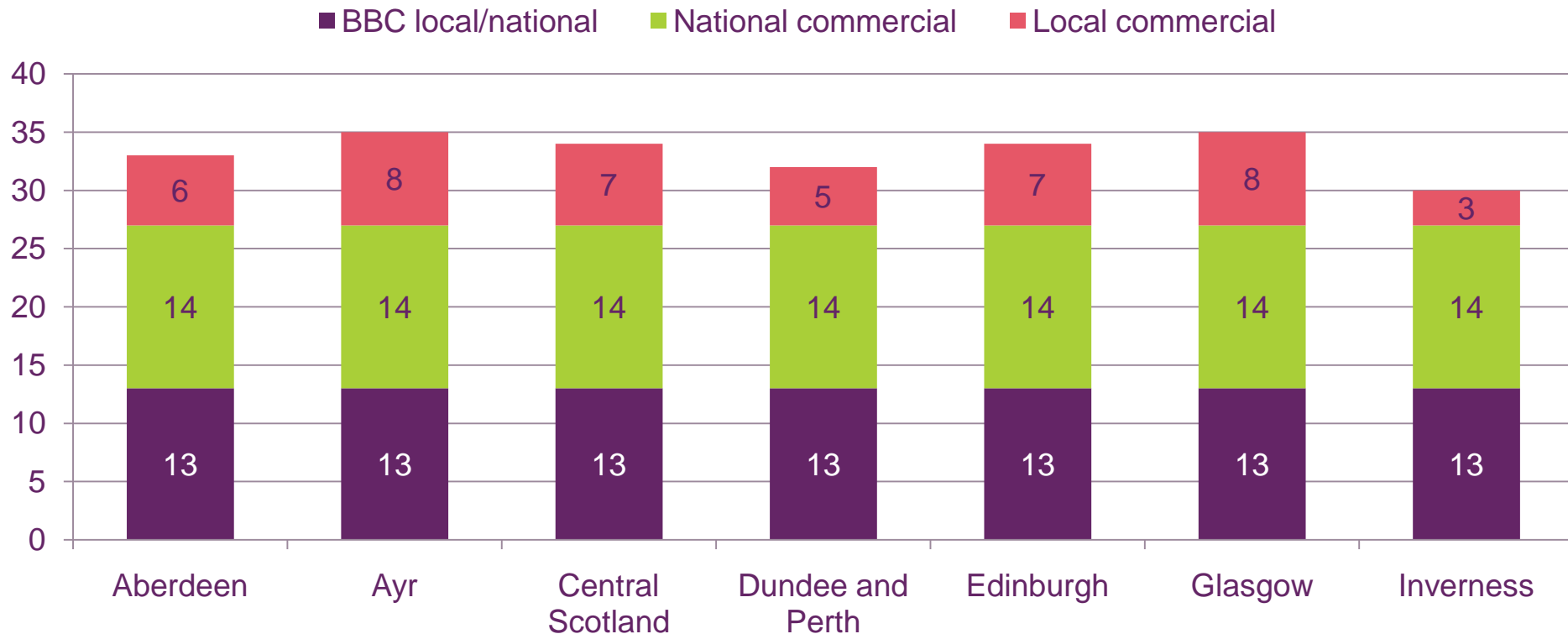
	2006	2007	2008	2009	2010	2011	2012
England	29	72	95	126	146	160	159
UK	36	90	123	163	184	199	197

■ Wales ■ Northern Ireland ■ Scotland



Source: Ofcom, April 2012

Availability of DAB stations in Scotland, by area



Source: Ofcom, April 2012

Note: This chart shows the maximum number of stations available in each area; local variations along with reception issues mean that listeners may not be able to access all of these

Ownership of DAB digital radios

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



Own DAB	38%	29%	40%	29%	22%	27%	39%	29%	26%	37%	31%	29%
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Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Source: Ofcom research, Quarter 1 2012

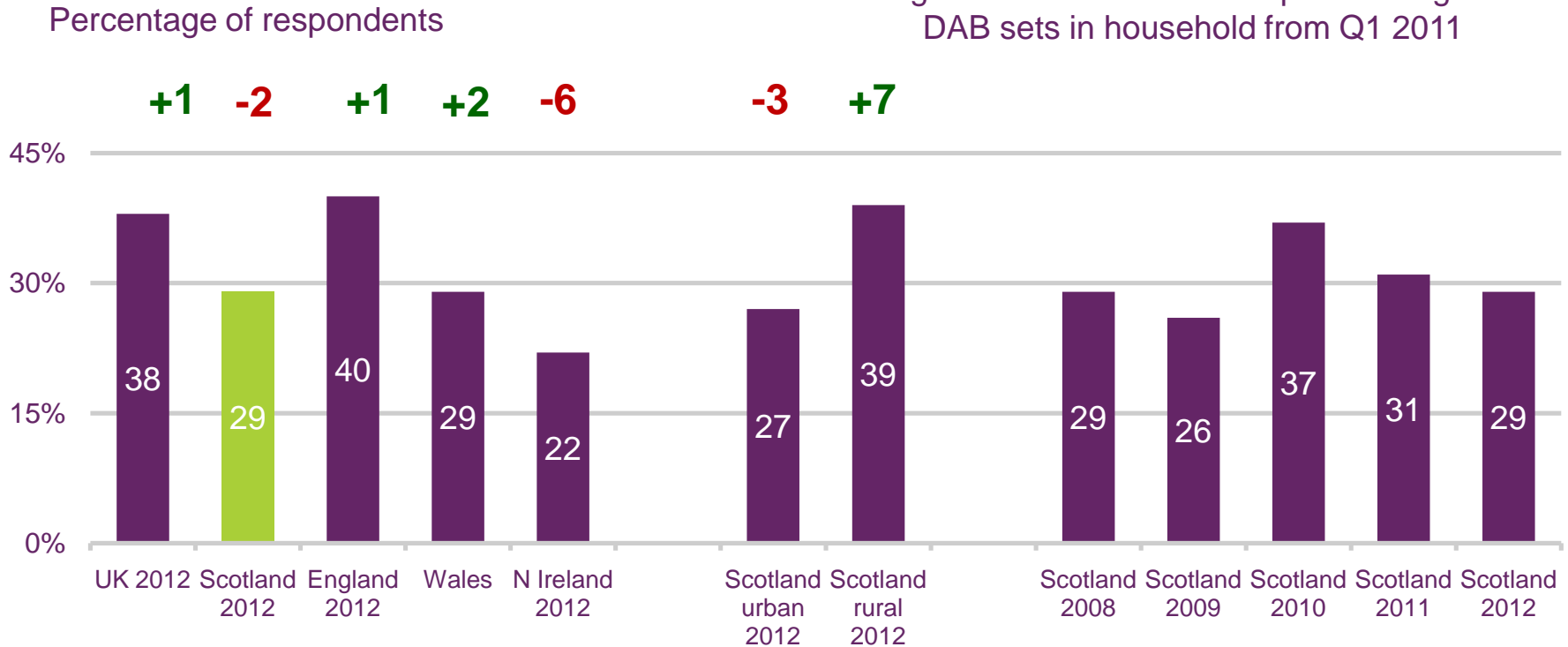
Base: Adults aged 16+ who listen to radio (n = 2963 UK, 364 Scotland, 1790 England, 405 Wales, 404 Northern Ireland, 200 Scotland urban, 164 Scotland rural, 766 Scotland 2008, 780 Scotland 2009, 1034 Scotland 2010, 357 Scotland 2011, 364 Scotland 2012)

Note: Remaining percentages are Don't know responses.

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

Ownership of DAB digital radios

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



Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who listen to radio (n = 2963 UK, 405 Wales, 1790 England, 364 Scotland, 404 Northern Ireland, 191 Wales urban, 214 Wales rural, 638 Wales 2008, 848 Wales 2009, 854 Wales 2010, 397 Wales 2011, 405 Wales 2012)

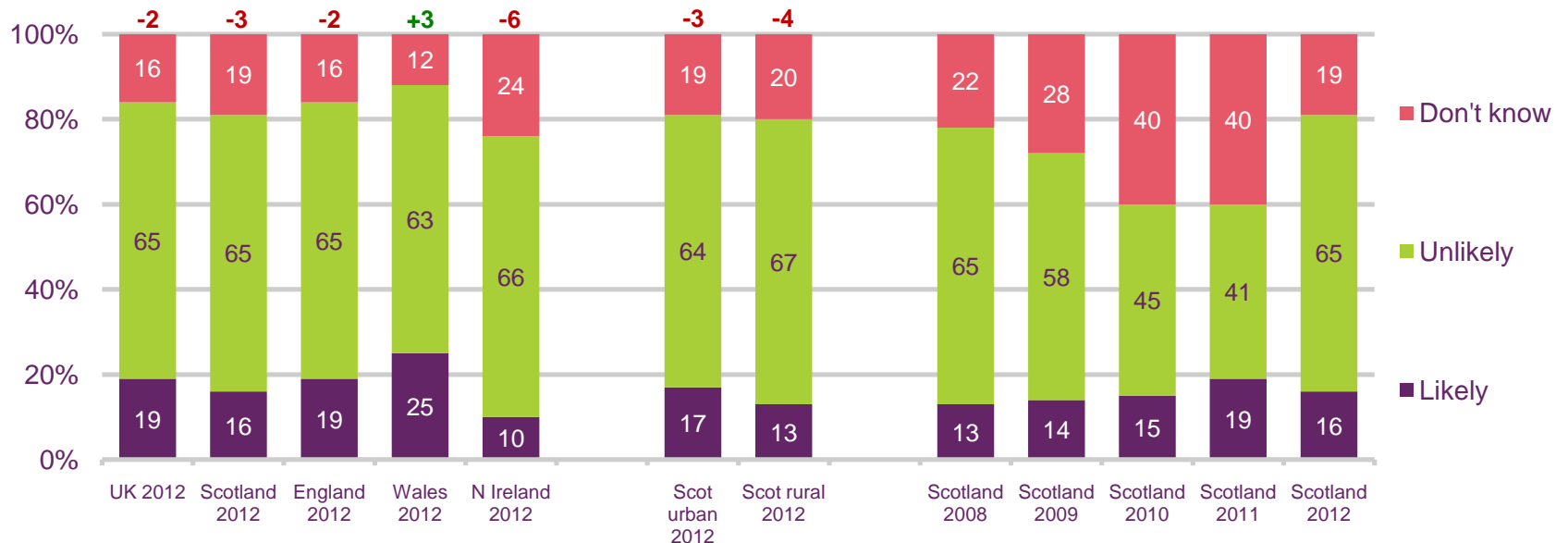
Note: Remaining percentages are Don't know responses.

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

Likelihood of purchasing a DAB radio within the next year

Figure above bar shows % point change in likely to purchase from Q1 2011

Percentage of respondents



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

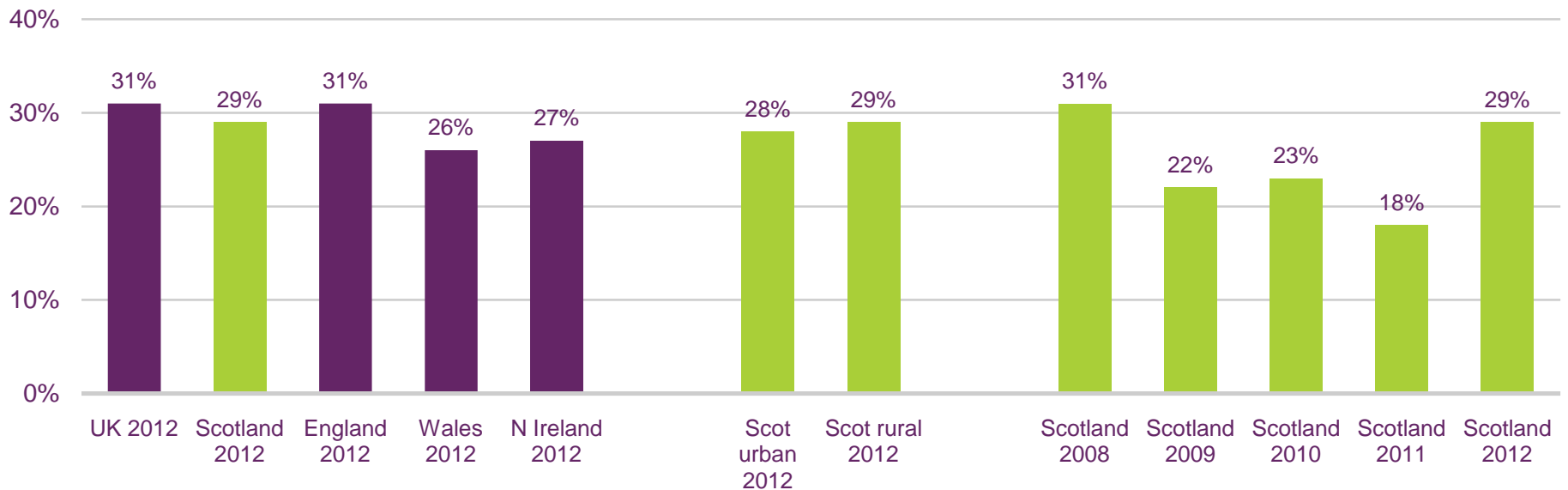
Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1855 UK, 243 Scotland, 1034 England, 273 Wales, 305 Northern Ireland, 145 Scotland urban, 98 Scotland rural, 550 Scotland 2008, 558 Scotland 2009, 661 Scotland 2010, 156 Scotland 2011, 243 Scotland 2012).

NB. Data in 2011 based on those who listen to radio, do not have a DAB set and have any radio sets in the household that someone listens to in most weeks. *Caution: Low base

Use of either an MP3 player or an iPod

Use of either an MP3 player or an iPod (% adults)



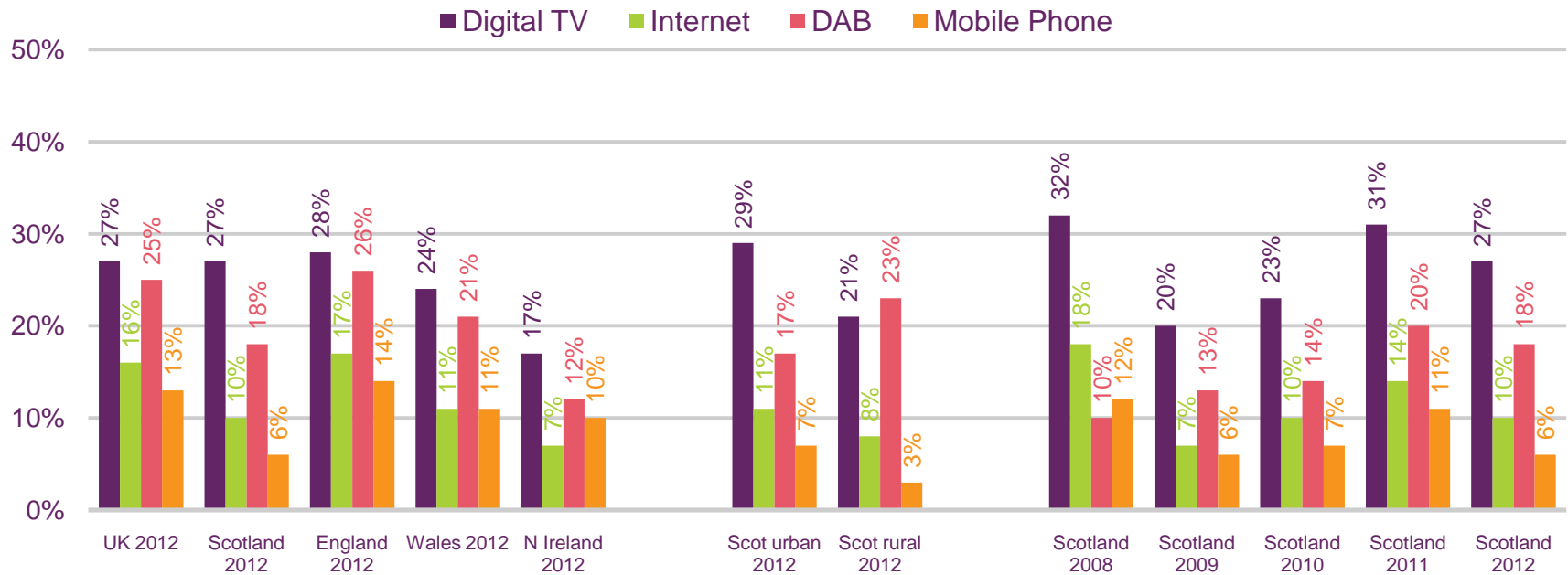
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Listening to radio via internet, DTV, mobile phone

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



QP11. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio, mobile phone?

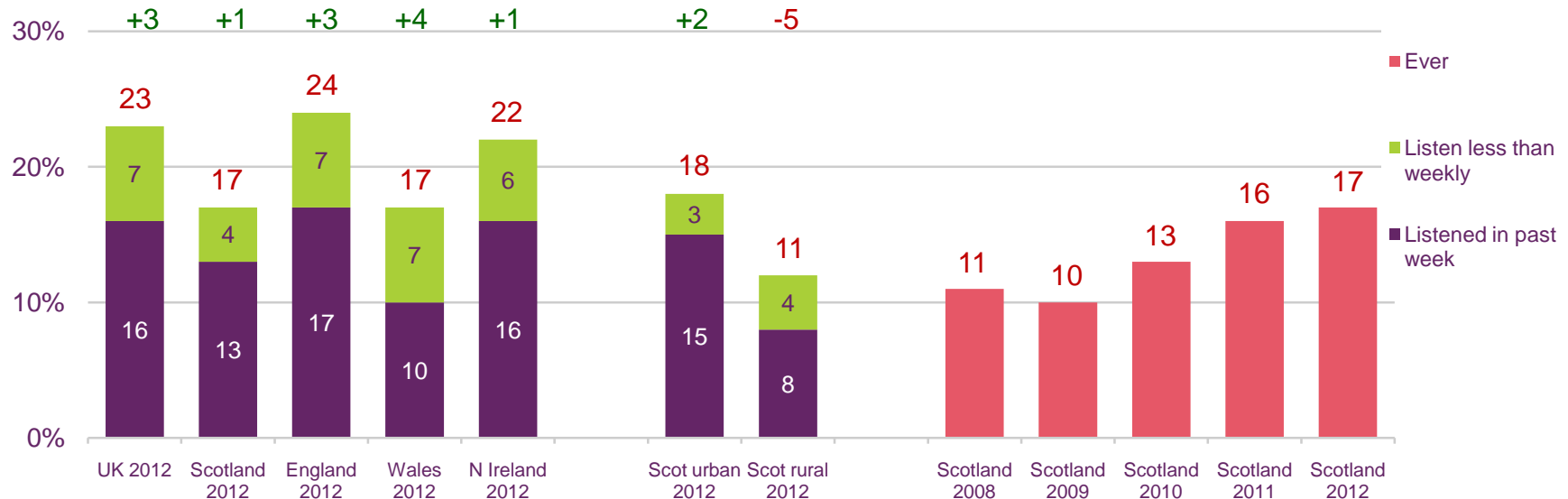
Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Listening to audio content on mobile phone

Proportion of respondents (%) who have used their mobile to listen to audio content

Figure above bar shows % point change in listening to audio content from Q1 2011

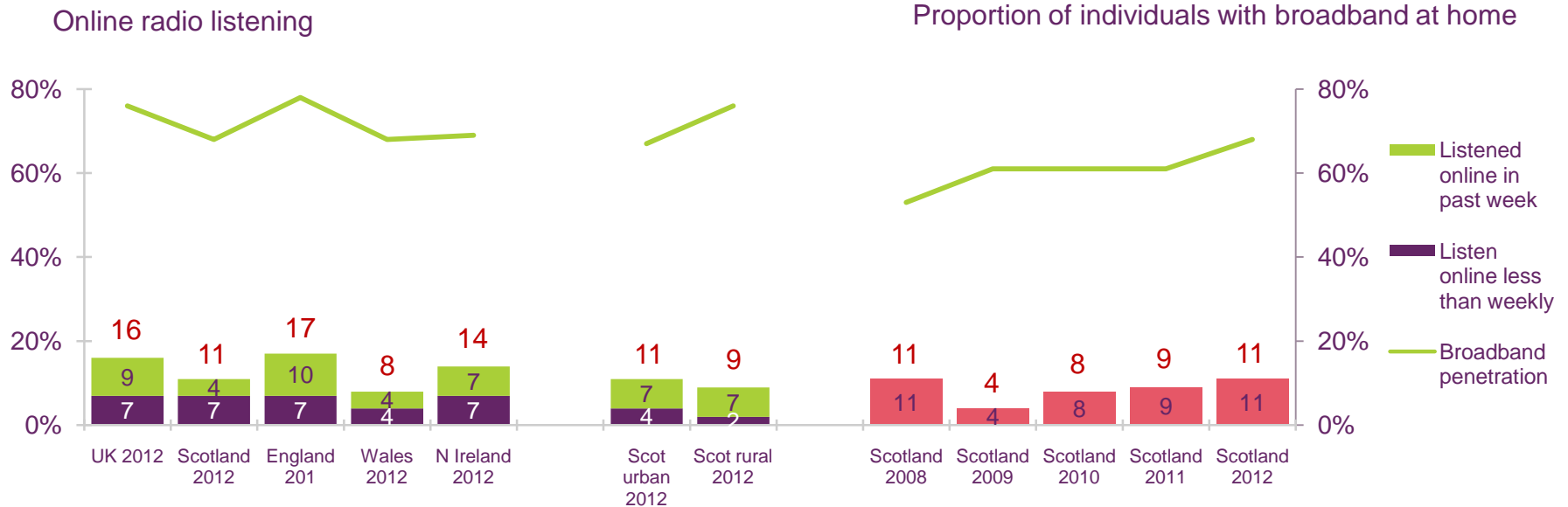


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

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



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

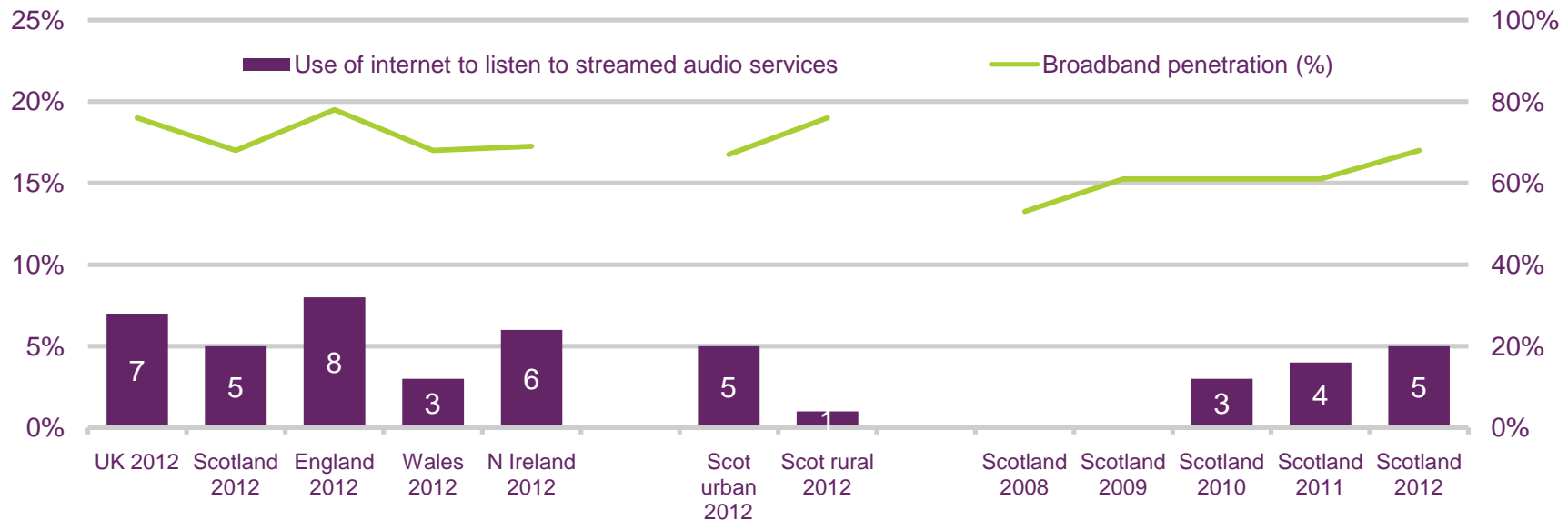
Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Use of internet for listening to streamed audio services

Use of internet to listen to streamed audio services

Proportion of individuals with broadband at home



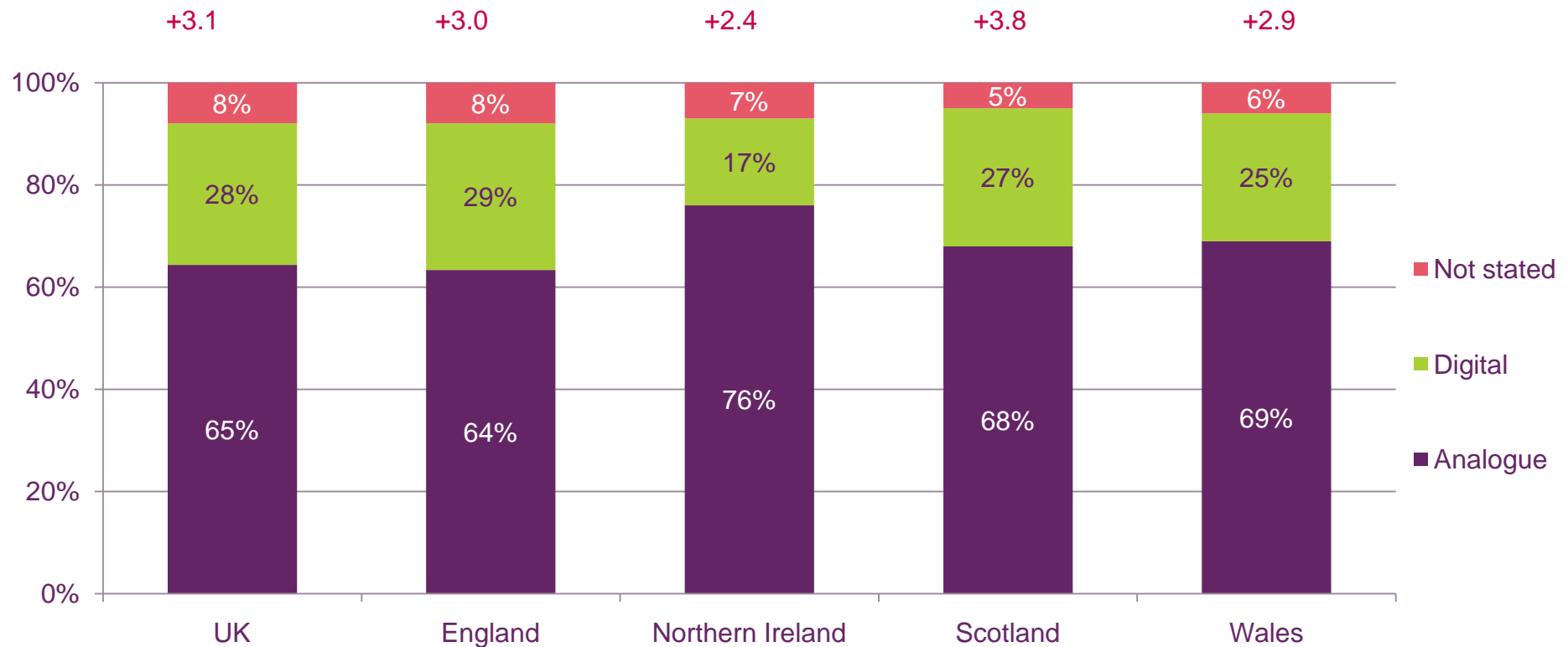
QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Share of listening hours via digital and analogue platforms, 2011

Digital listening year on year (percentage points)



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

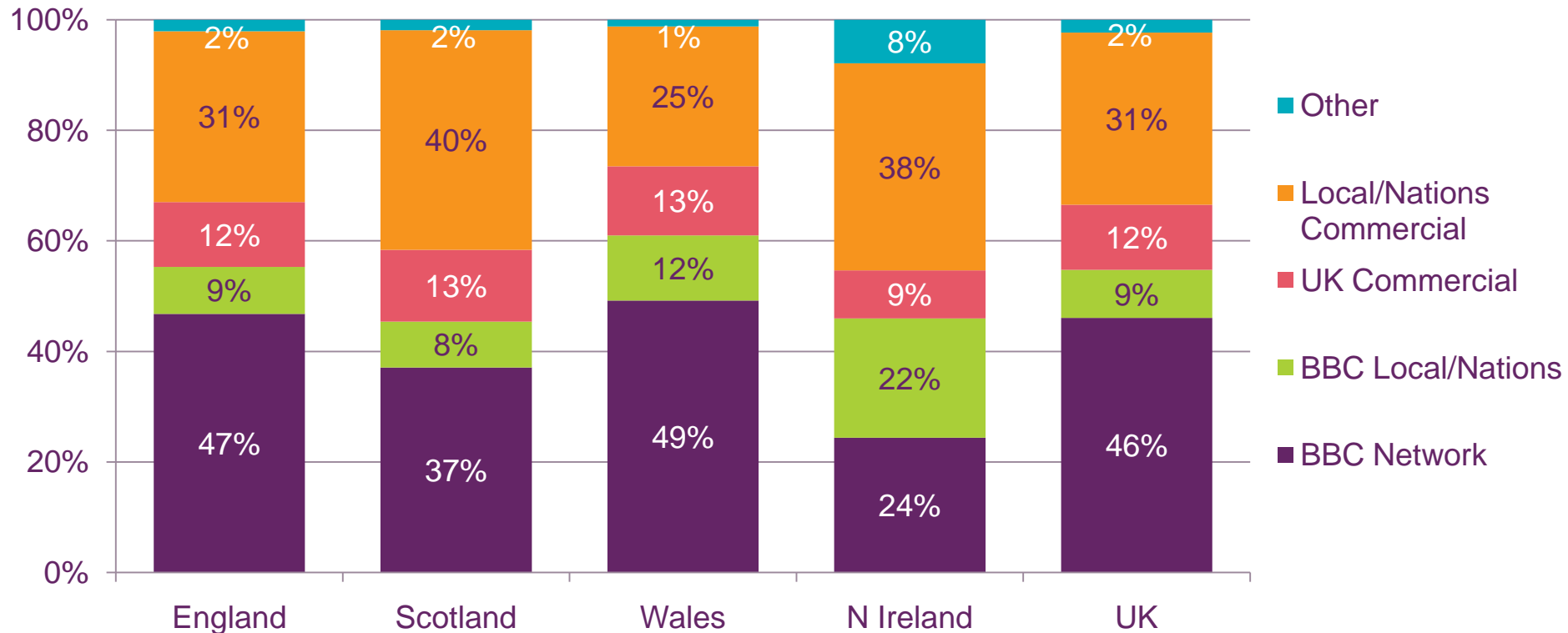
Average weekly reach and listening hours: year to Q4 2011

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

Source: RAJAR, All adults (15+), year ended Q4 2011. Reach is defined as a percentage of the area adult population who listen to a station for at least 5 minutes in the course of an average week.

Share of listening hours, by nation: year to Q4 2011

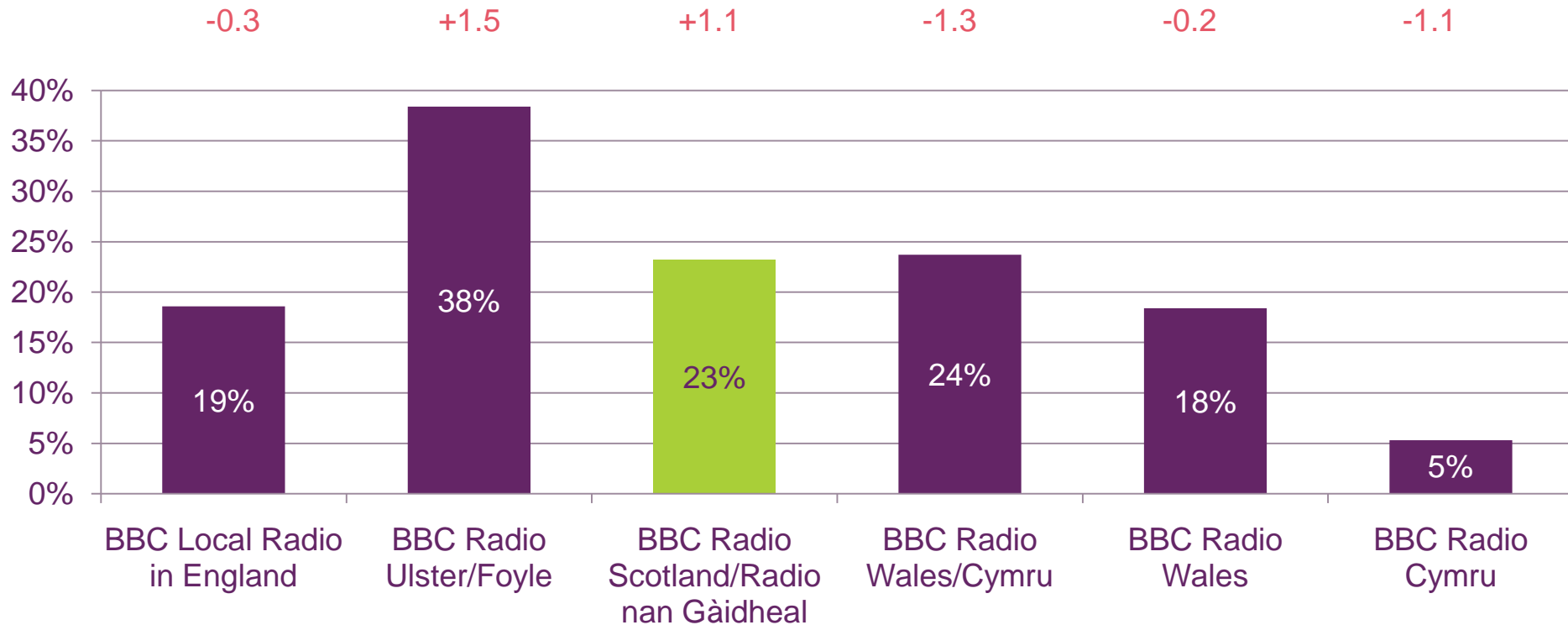
Audience share



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

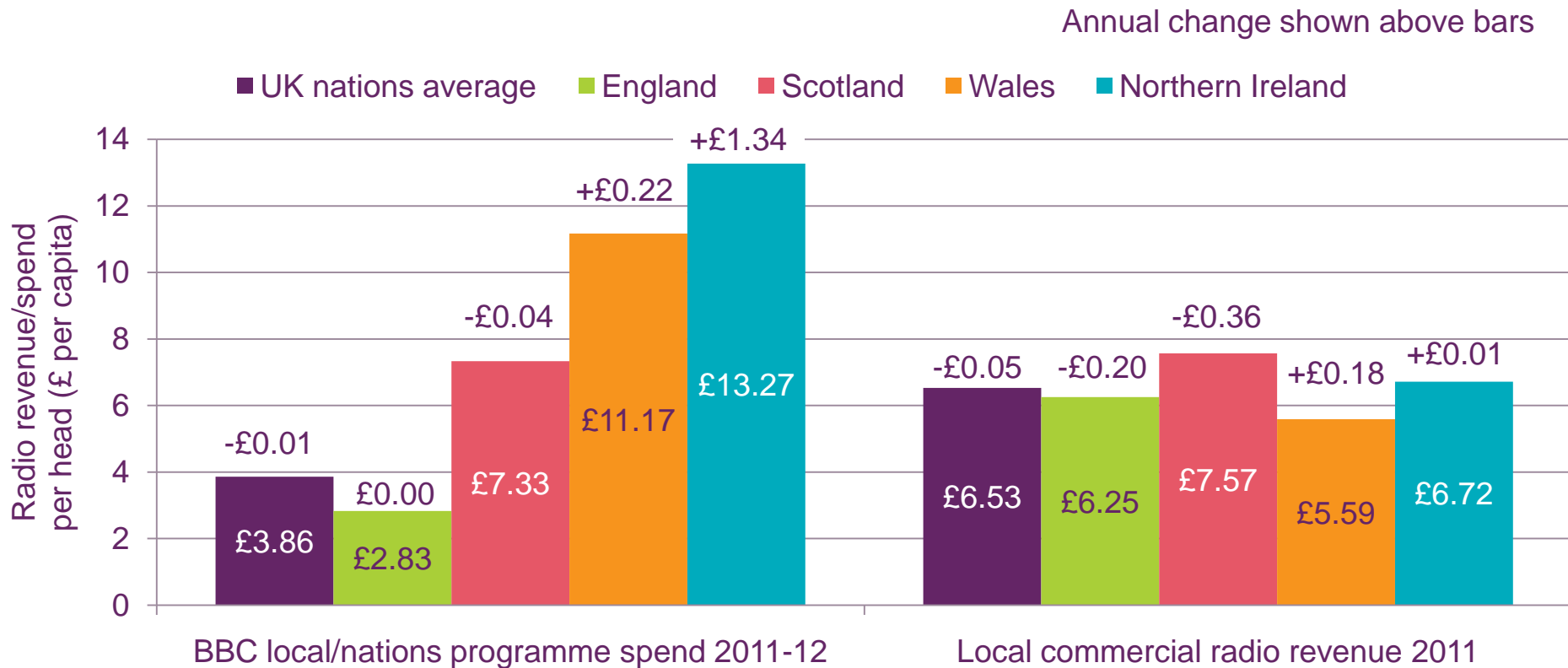
Weekly reach for national / local BBC services

Change on previous year (percentage points)



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

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



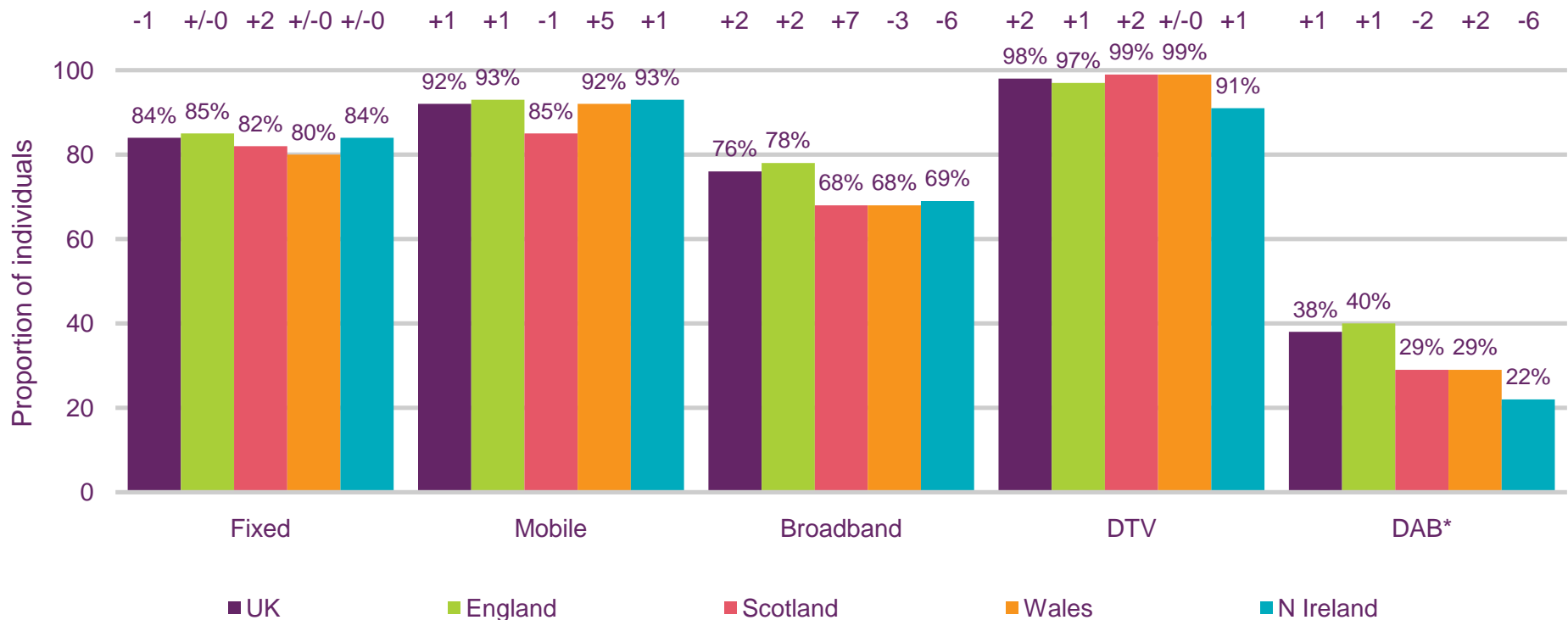
Source: Broadcasters

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT and Absolute.

Internet and web-based content

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)

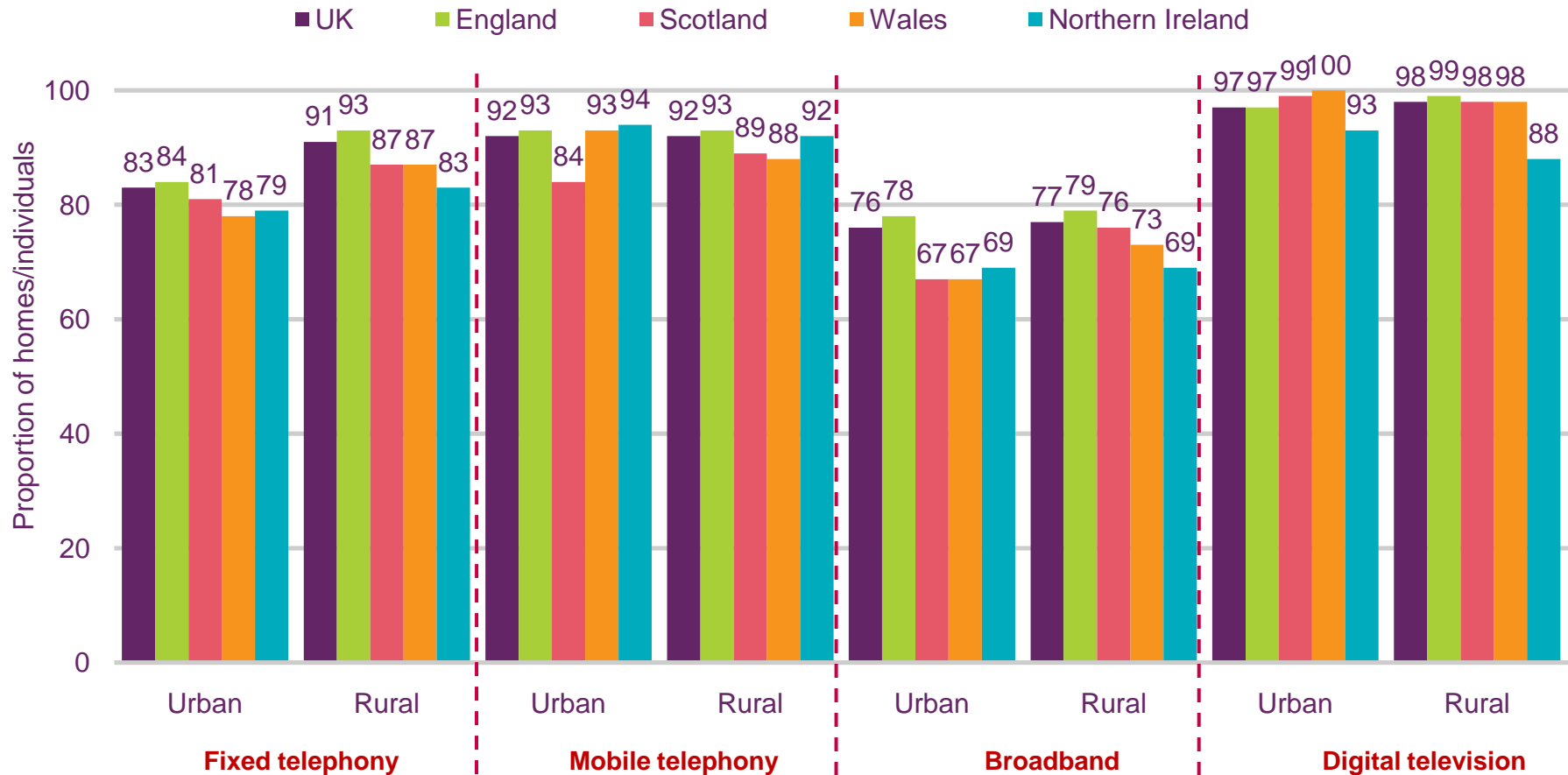
DTV question: Which, if any, of these types of television does your household use at the moment?

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

Adoption of communications technology/services in urban and rural locations

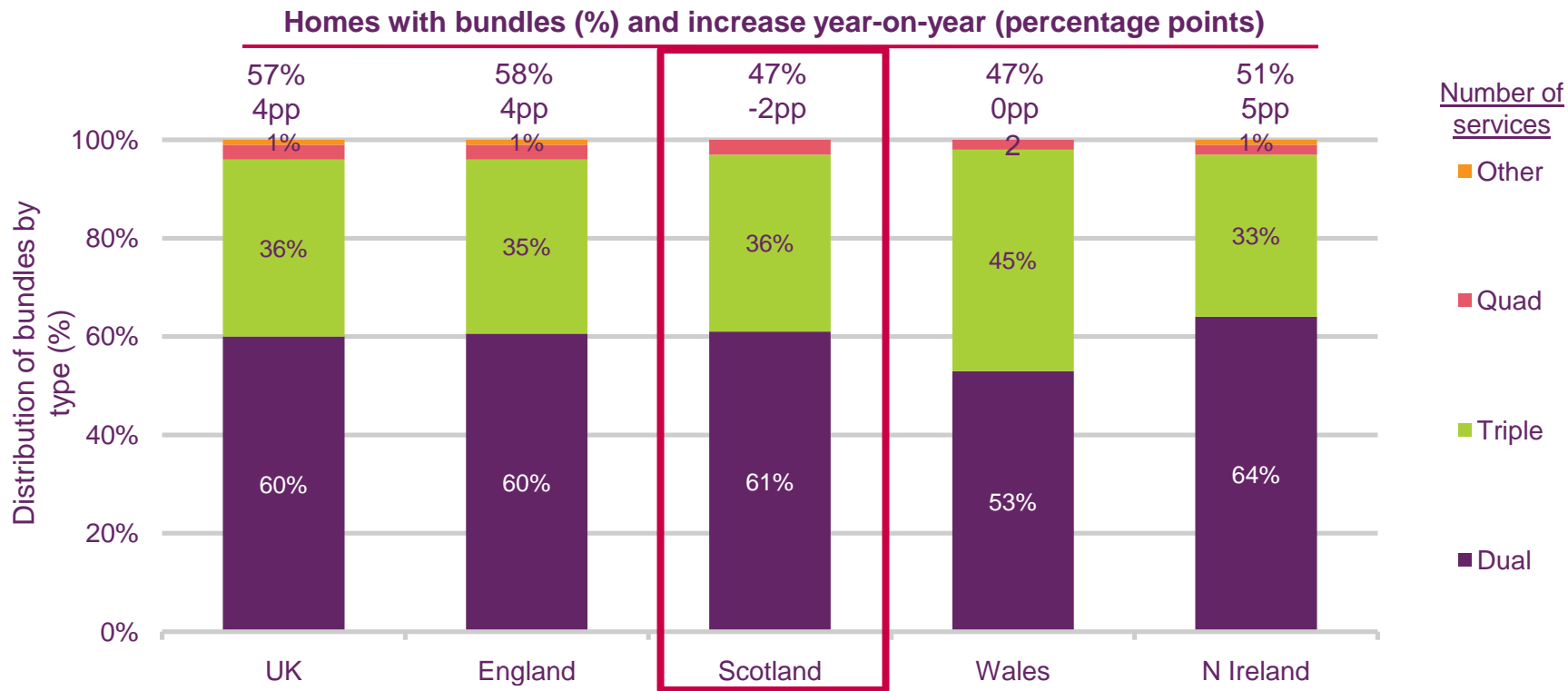


Source: Ofcom research, Quarter 1 2012

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

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

Take-up of bundles, by nation

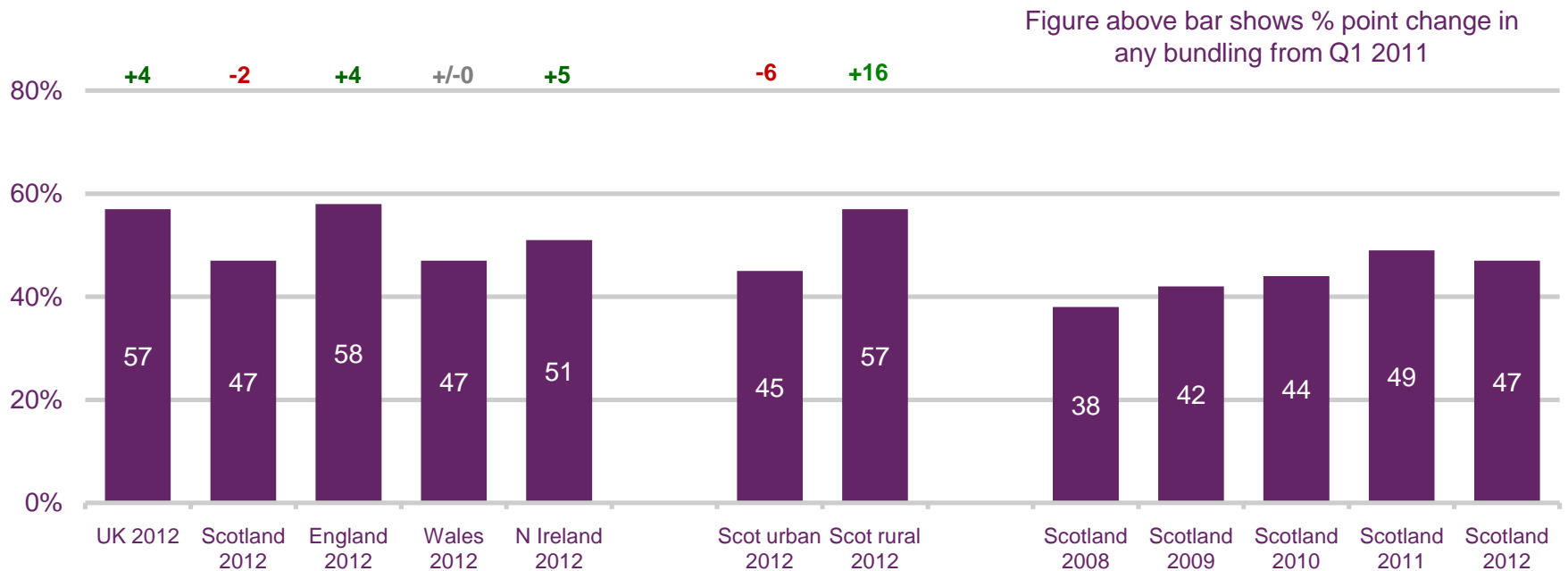


Source: Ofcom research, Q1 2012

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

Note: Remaining percentages are Don't know responses

Percentage of consumers buying bundled services

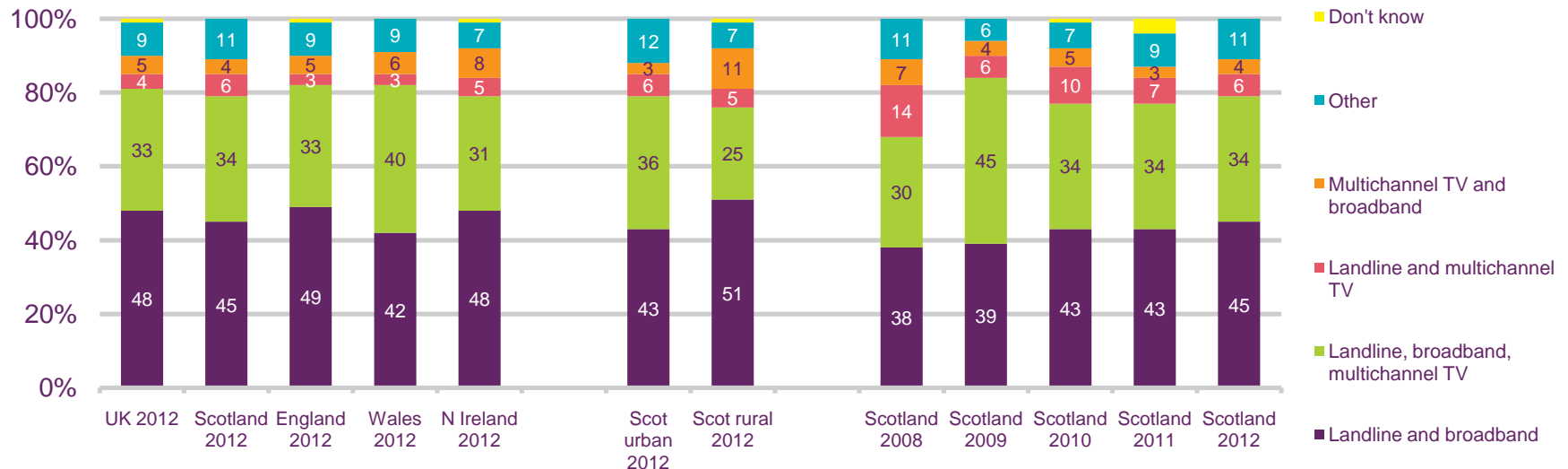


QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ QG3. Do you receive a discount or special deal for subscribing to this package of services?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Trends in purchasing multiple communication services from a single supplier

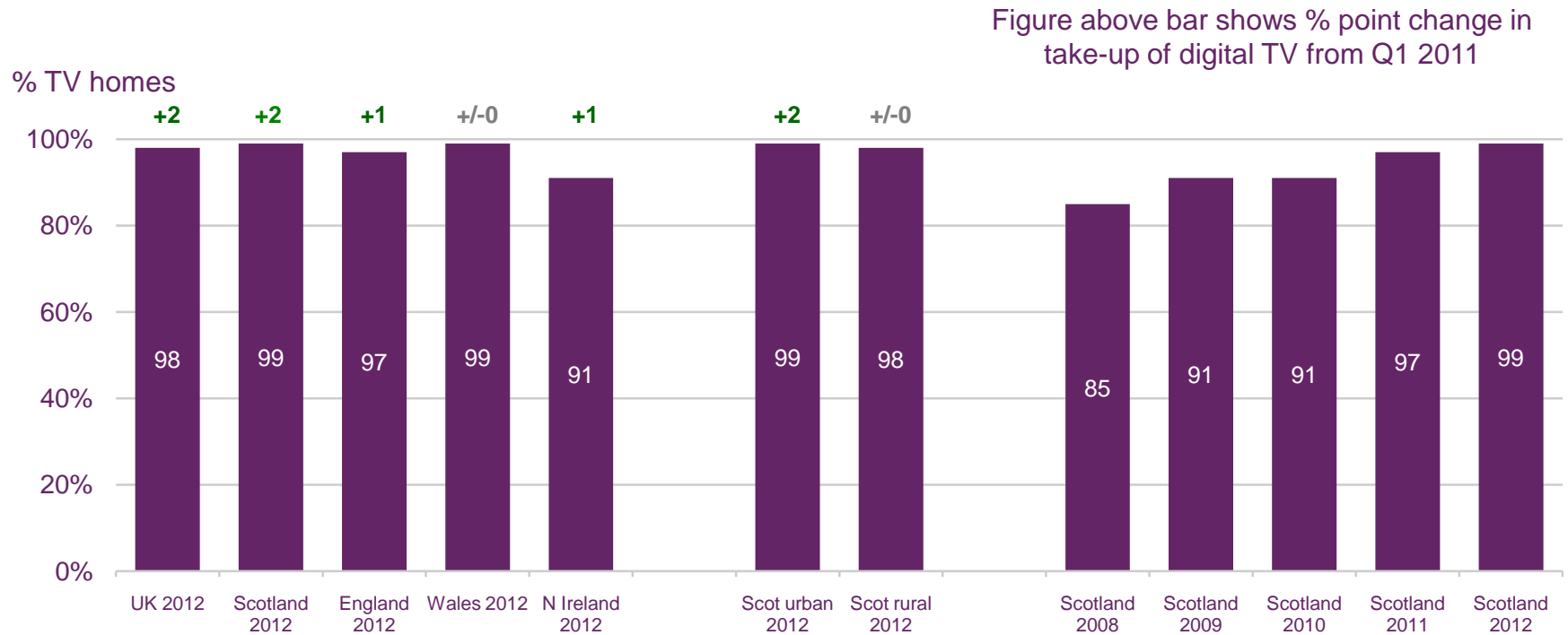


QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2007 UK, 254 Scotland, 1276 England, 223 Wales, 254 Northern Ireland, 121 Scotland urban, 133 Scotland rural, 324 Scotland 2008, 351 Scotland 2009, 605 Scotland 2010, 226 Scotland 2011, 254 Scotland 2012)

Take-up digital TV



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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a TV in household (n = 3713 UK, 489 Scotland, 2214 England, 508 Wales, 502 Northern Ireland, 254 Scotland urban, 235 Scotland rural, 916 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011, 489 Scotland 2012)

Main TV set share by platform

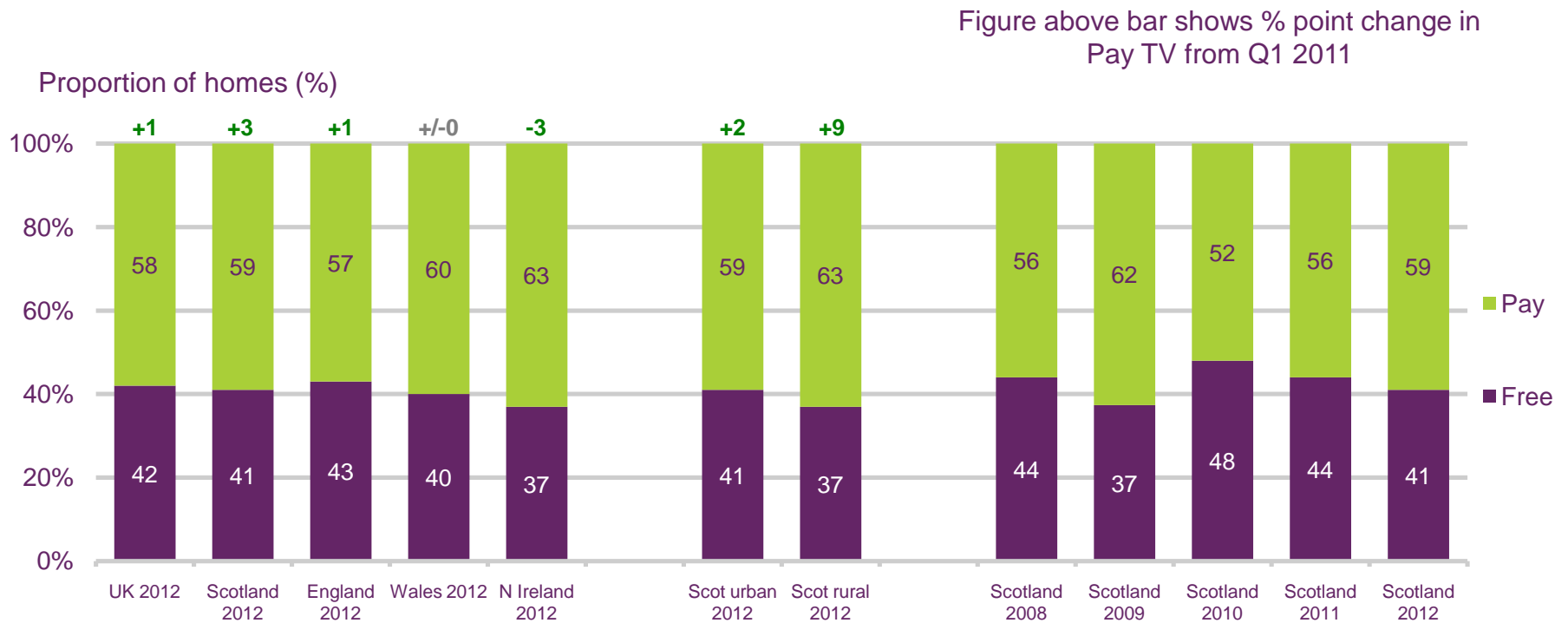


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Proportion of homes with free and pay television

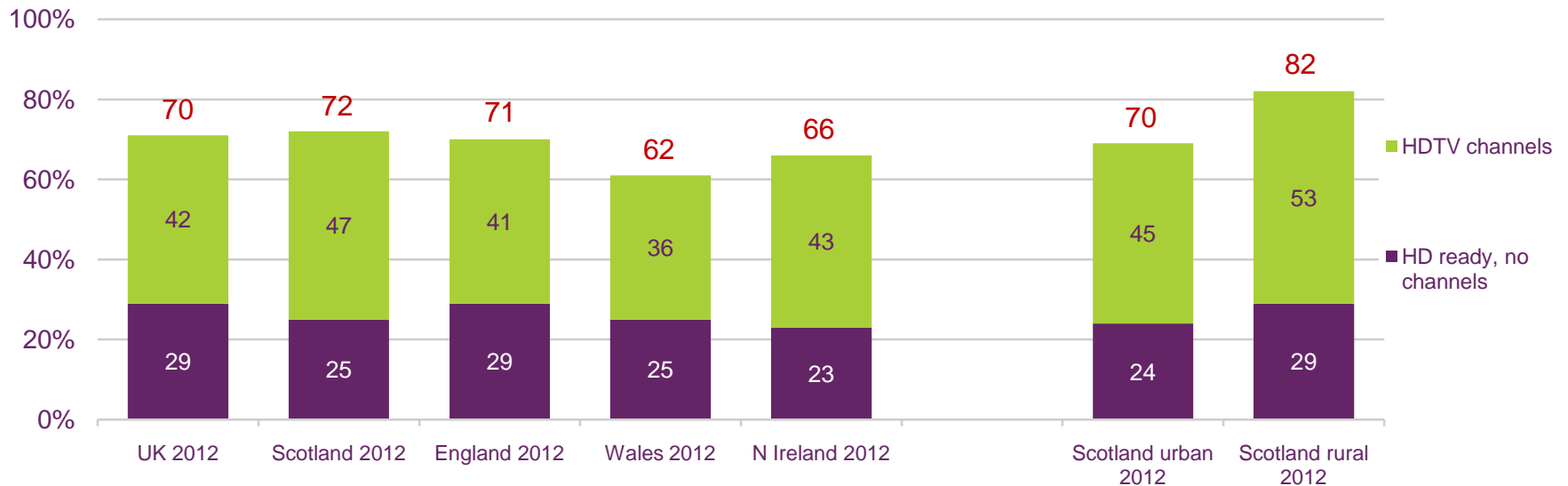


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ with a TV in household (n = 3713 UK, 489 Scotland, 2214 England, 508 Wales, 502 Northern Ireland, 254 Scotland urban, 235 Scotland rural, 855 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011, 489 Scotland 2012)

Proportion of homes with HD television



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

Source: Ofcom research, Quarter 1 2012

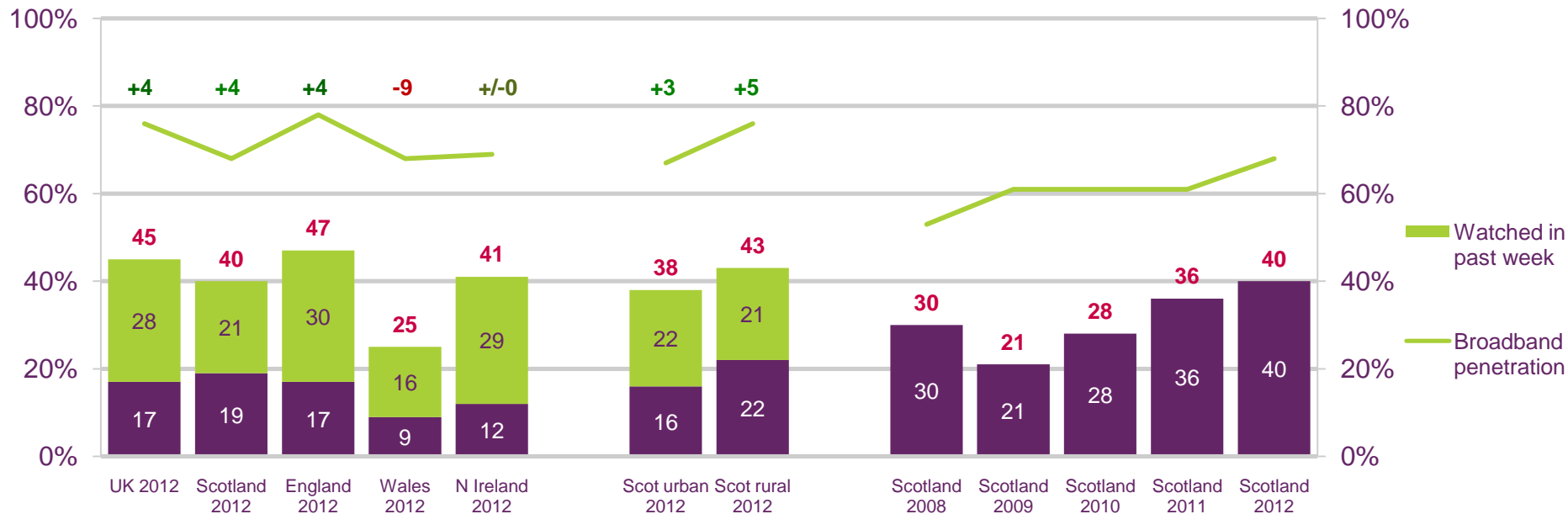
Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural)

Online TV/ video viewing

Online TV/ video viewing on PC or mobile

Green figure above bar shows % point change in viewing from Q1 2011

Proportion of individuals with broadband at home



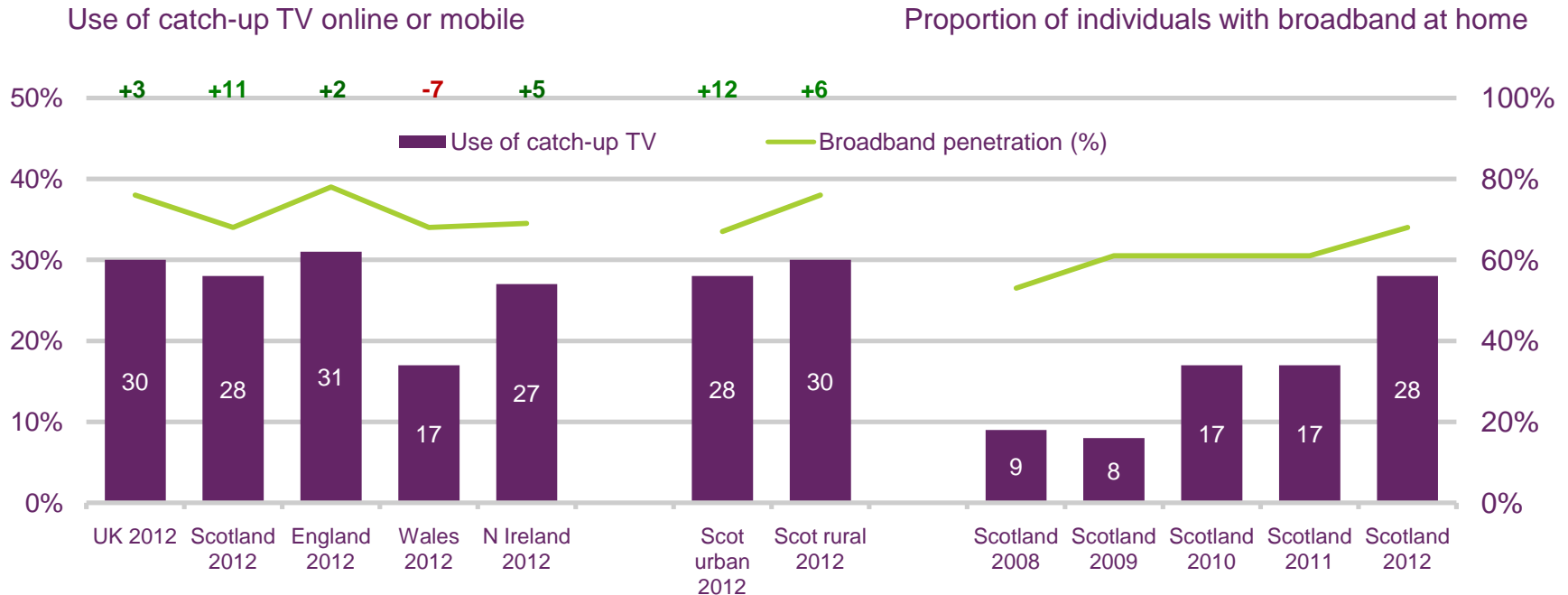
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? / QD28A-B. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? And which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Use of catch-up TV

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

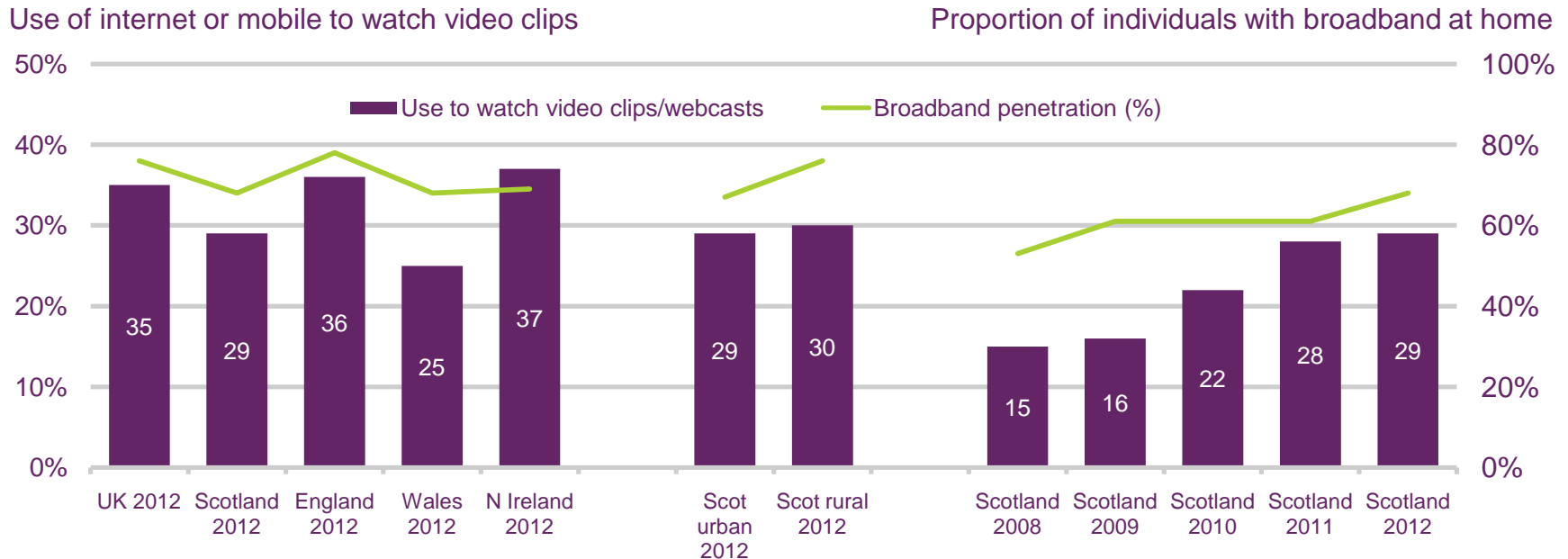


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

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



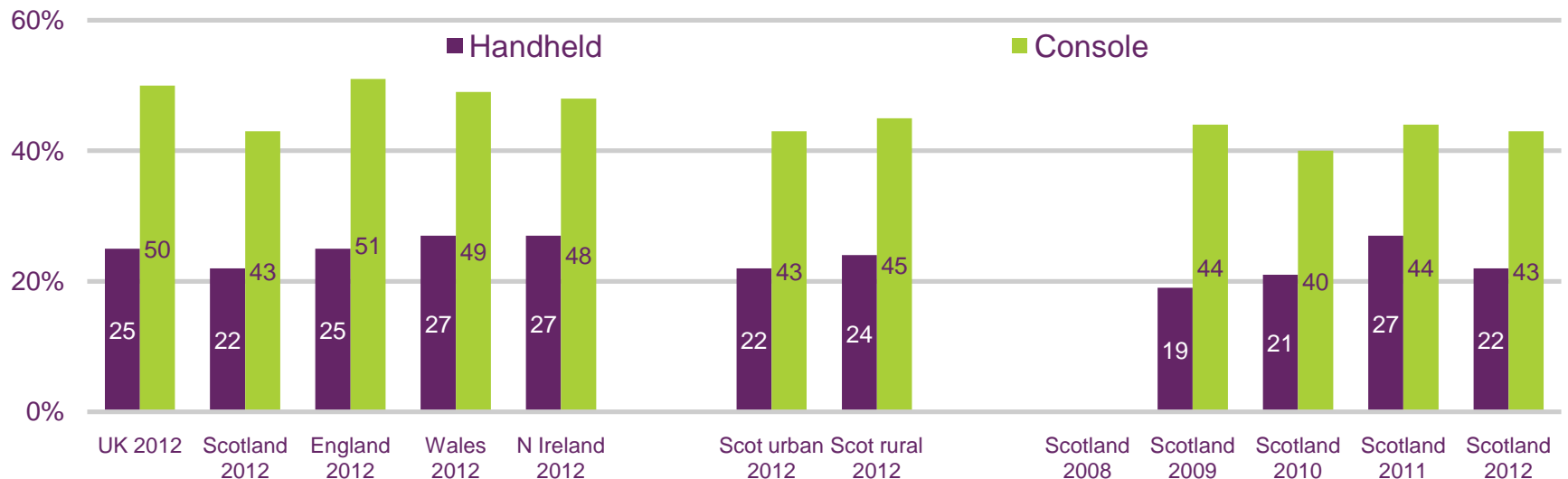
QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? ?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Take up of leading games consoles in Scotland

Take-up (%)



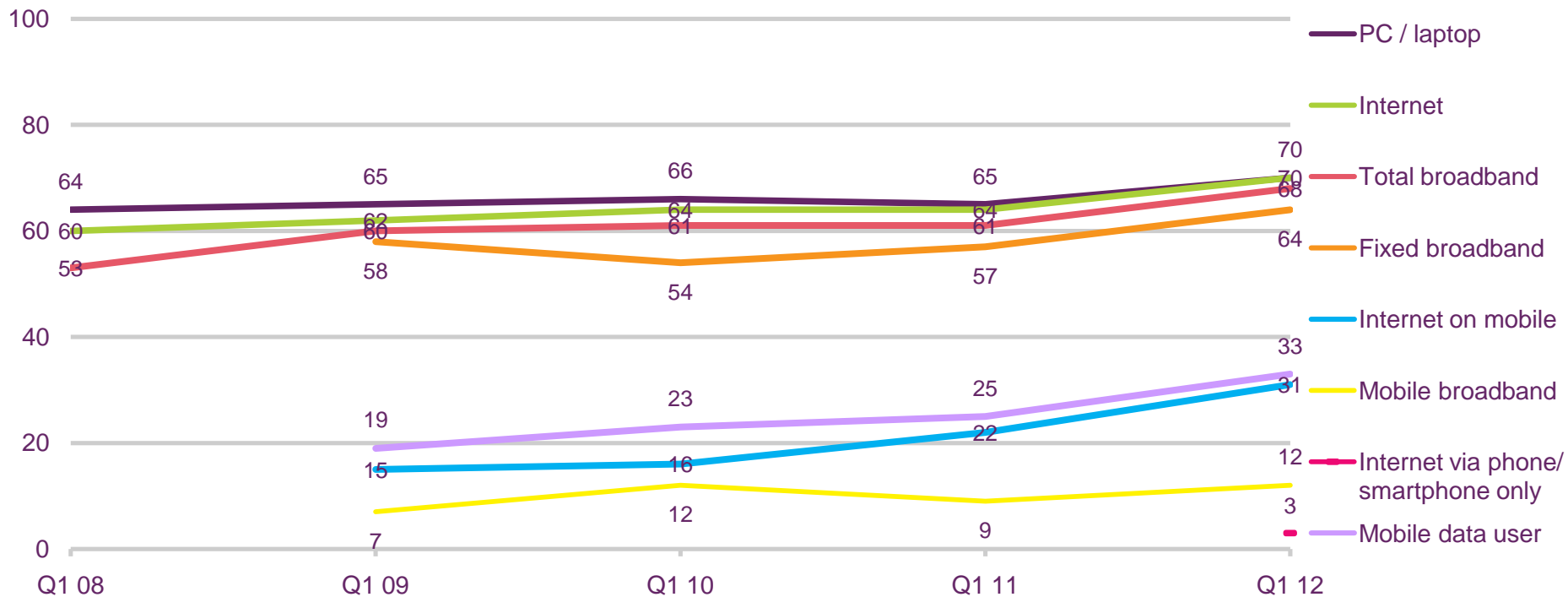
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

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

Proportion of households (%)



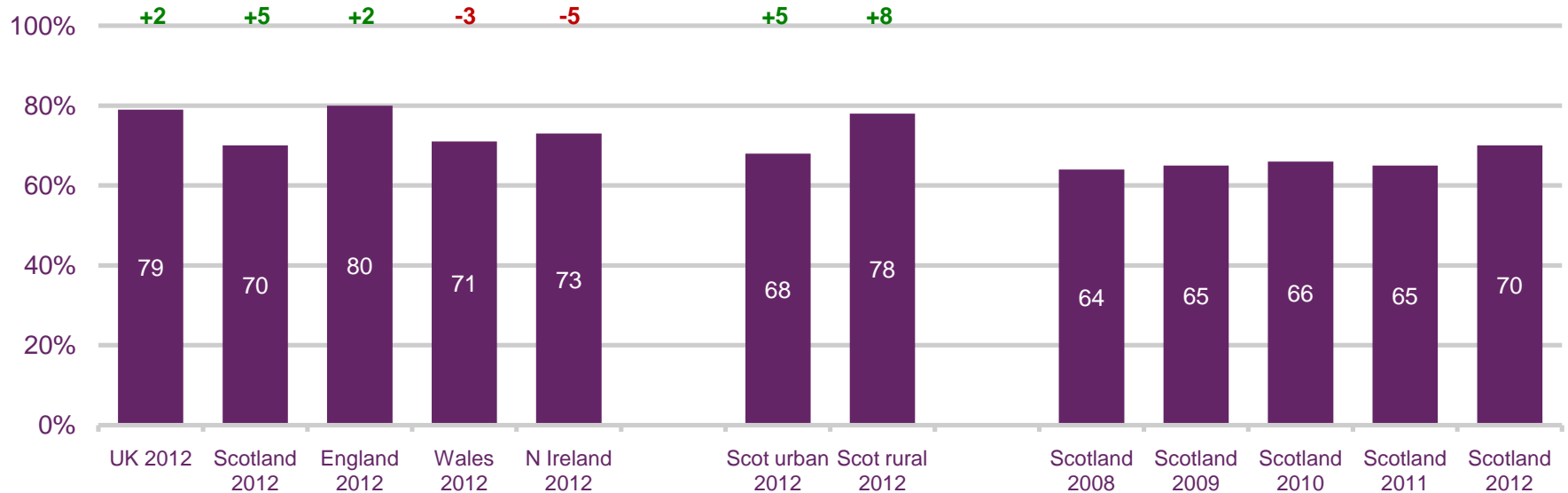
Source: Ofcom technology tracker

Base: All adults aged 16+ (n = 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Residential PC ownership

PC ownership

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

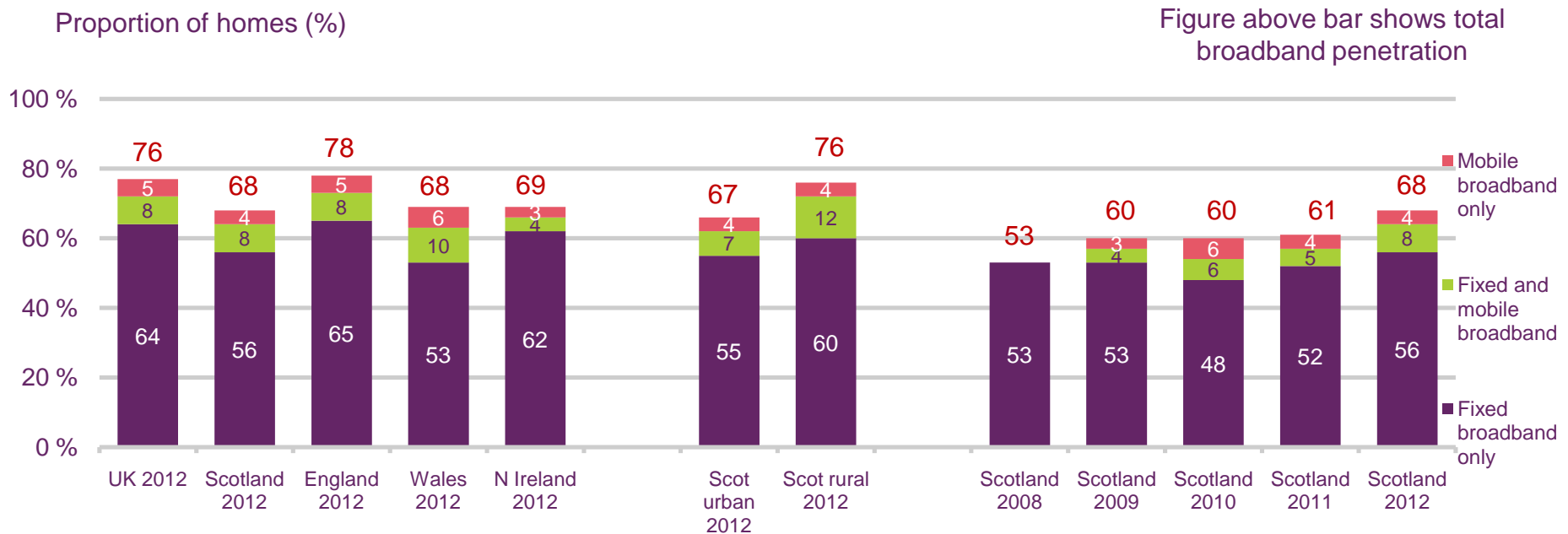


QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Consumer broadband (by connection type)

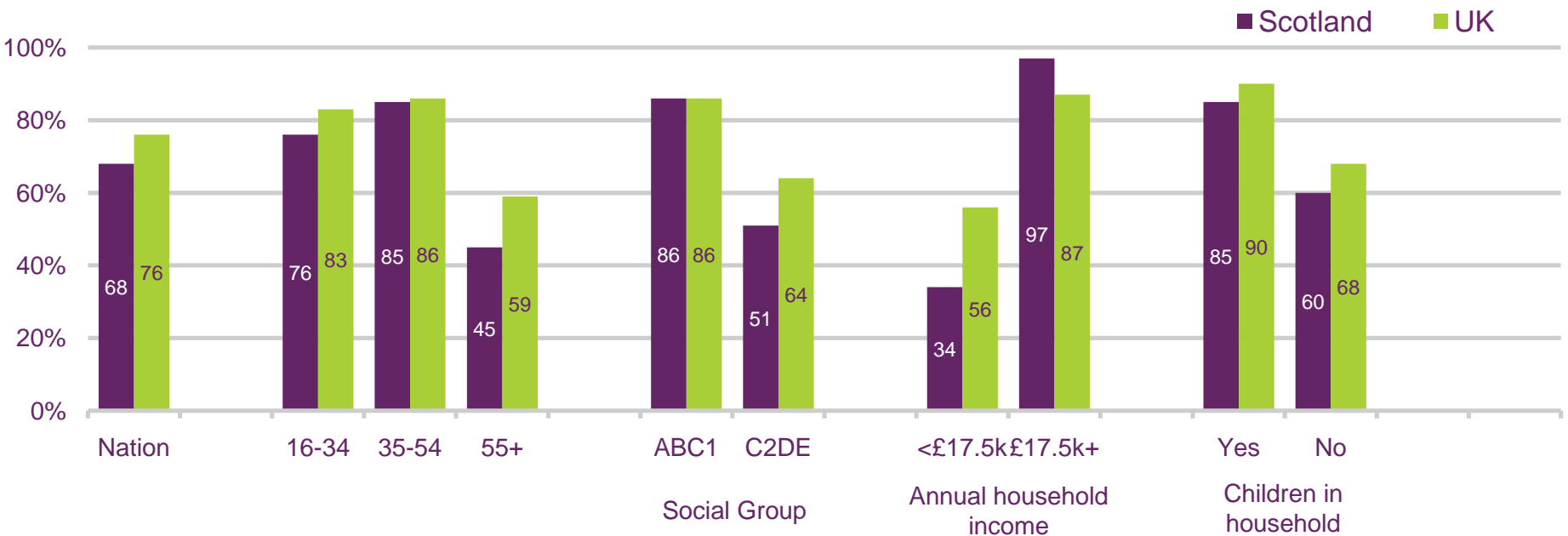


QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Consumer broadband take-up in Scotland (by demographic)



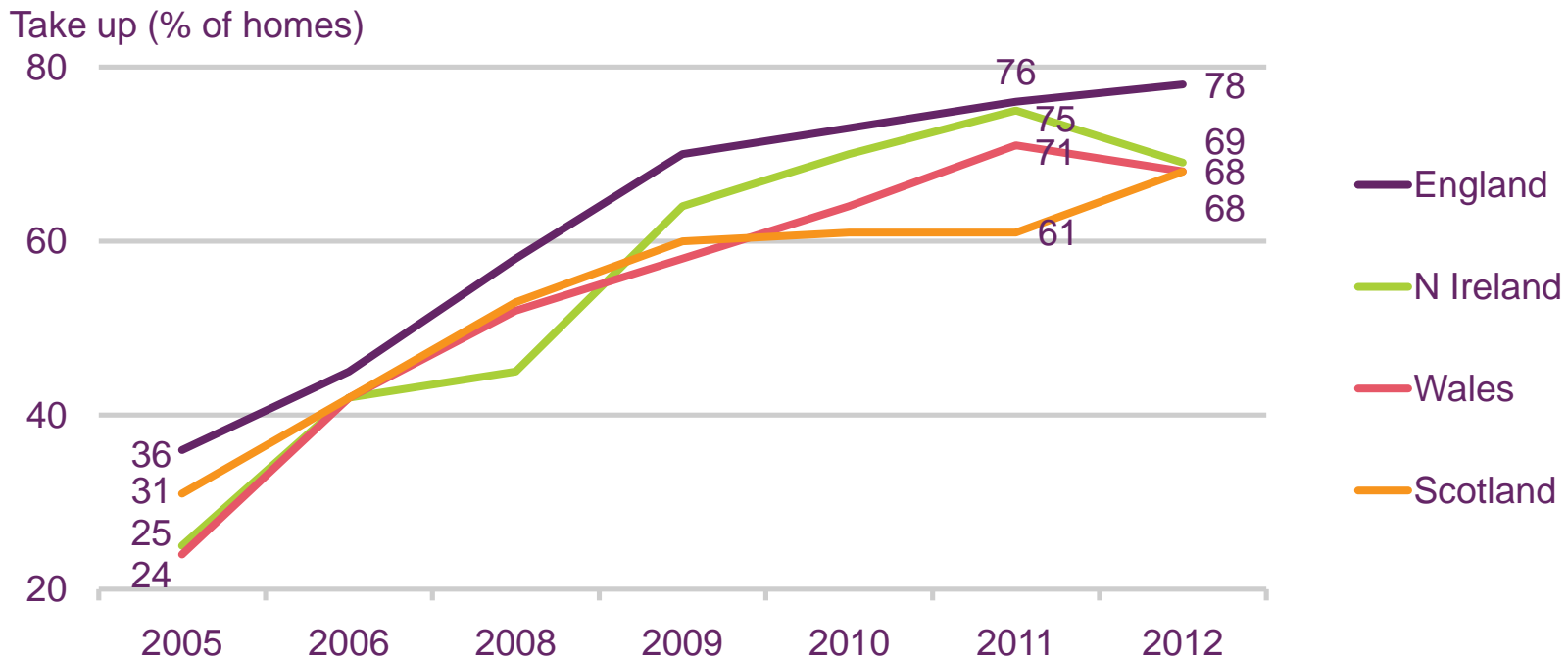
Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n =500 Scotland, 140 16-34s, 172 35-54s, 187 55+, 238 ABC1, 164 C2DE, 109 <£17.5k income, 154 £17.5k+, 154 children in home, 346 no children in home)

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

Broadband – take-up

Broadband take-up across the UK's nations

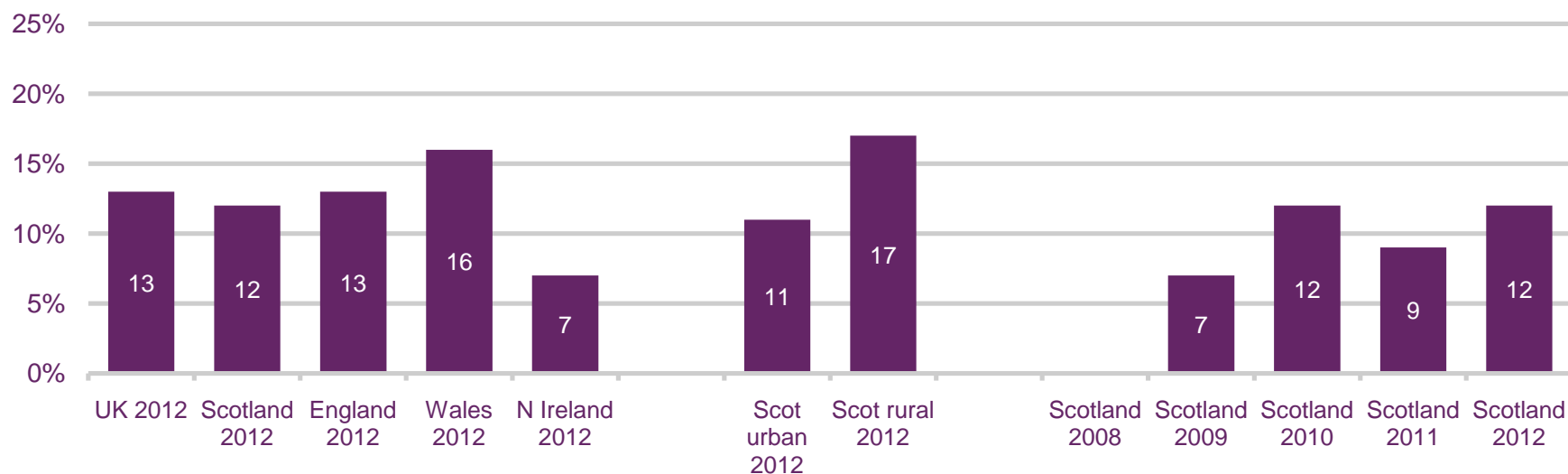


QE9. Which of these methods does your household use to connect to the internet at home?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 15+ (n = 3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland)

Take-up of mobile broadband

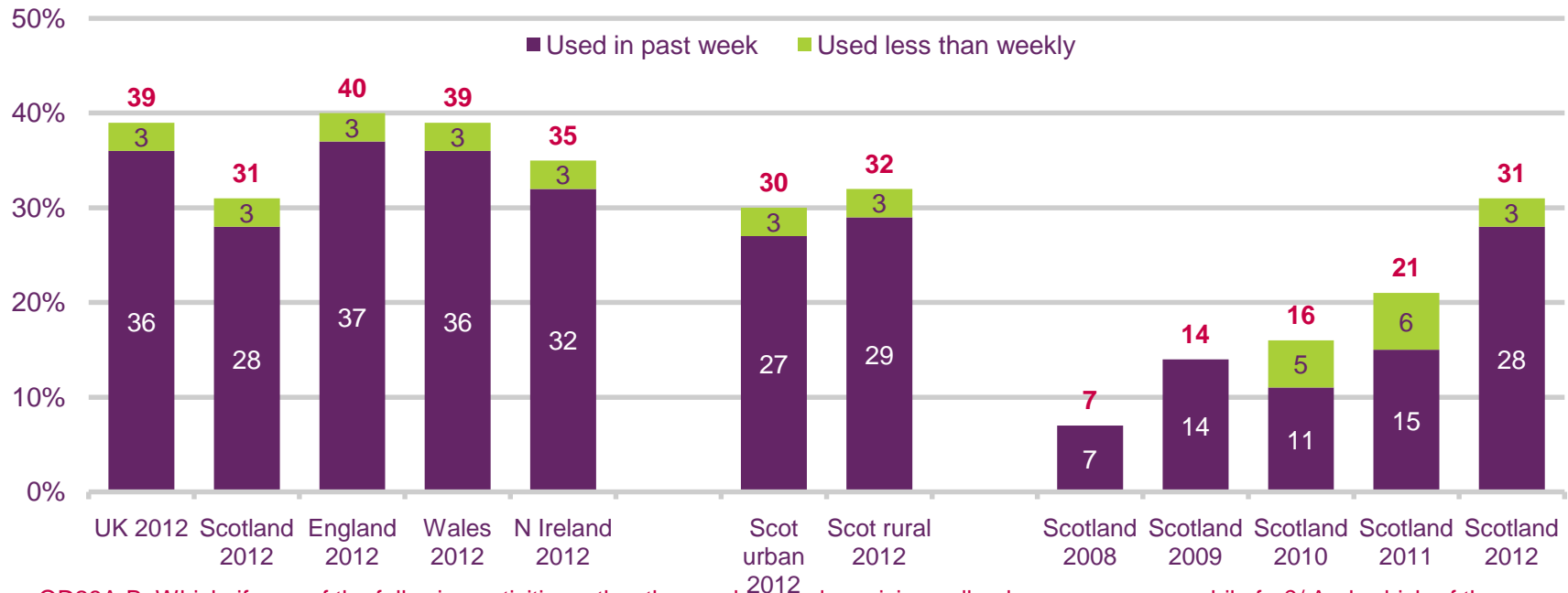


QE9. Which of these methods does your household use to connect to the Internet at home? (NB 2008 survey did not cover mobile broadband)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

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

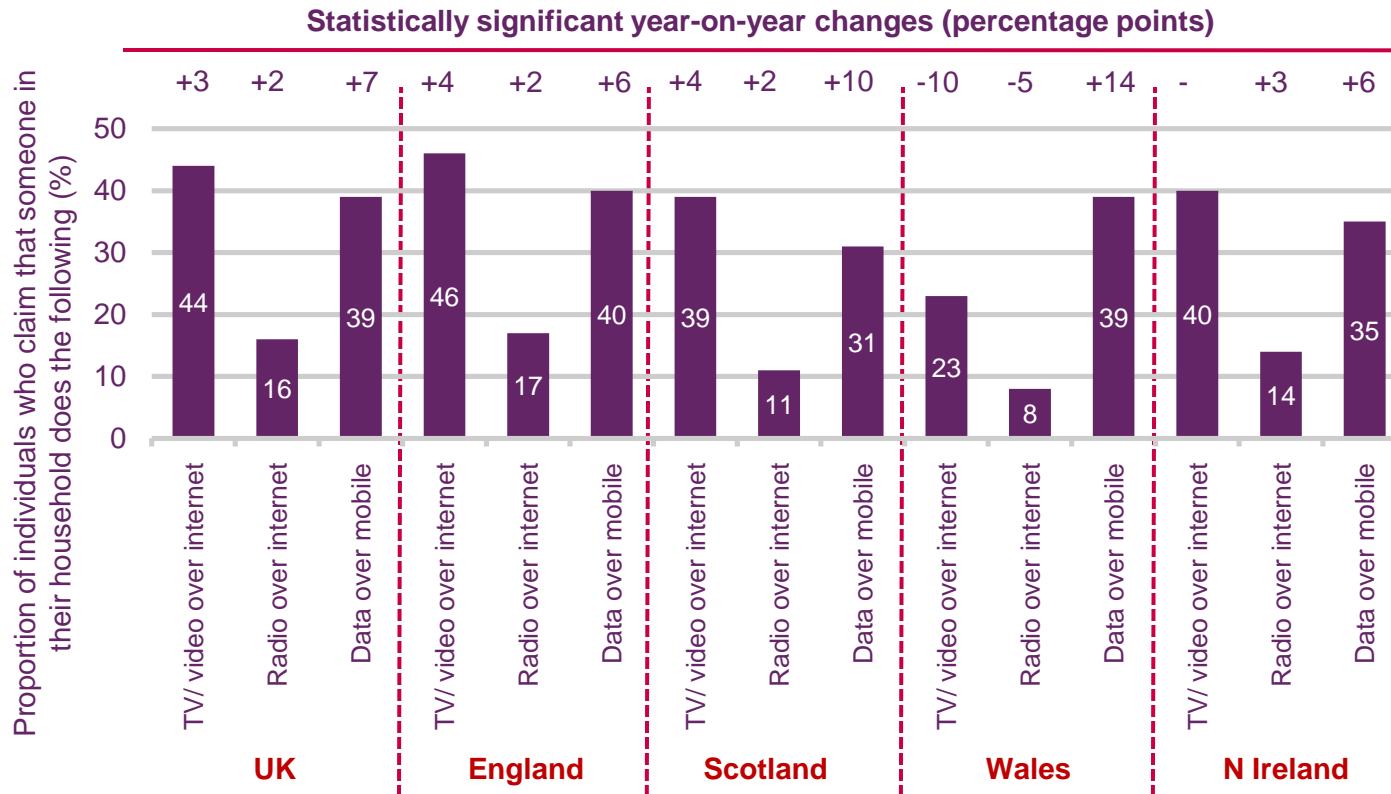


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Consumers' use of converging platforms, 2012



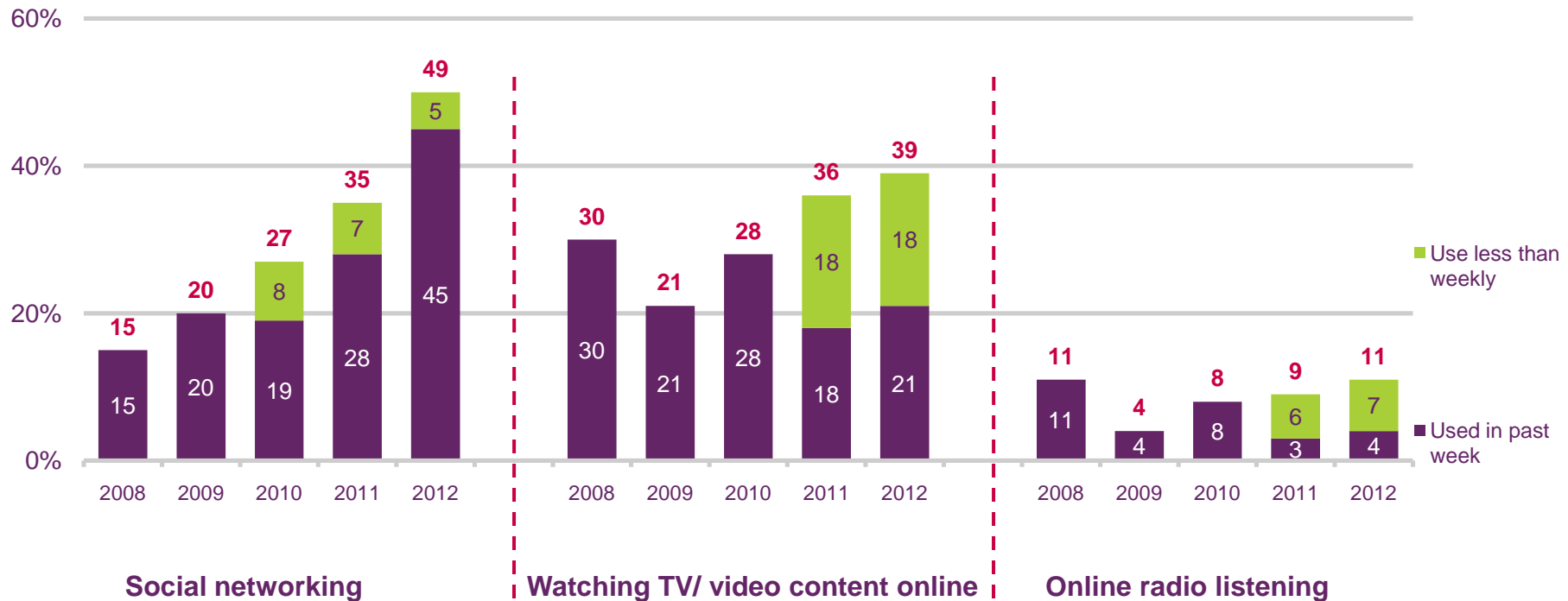
Source: Ofcom research, Quarter 1 2012

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

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

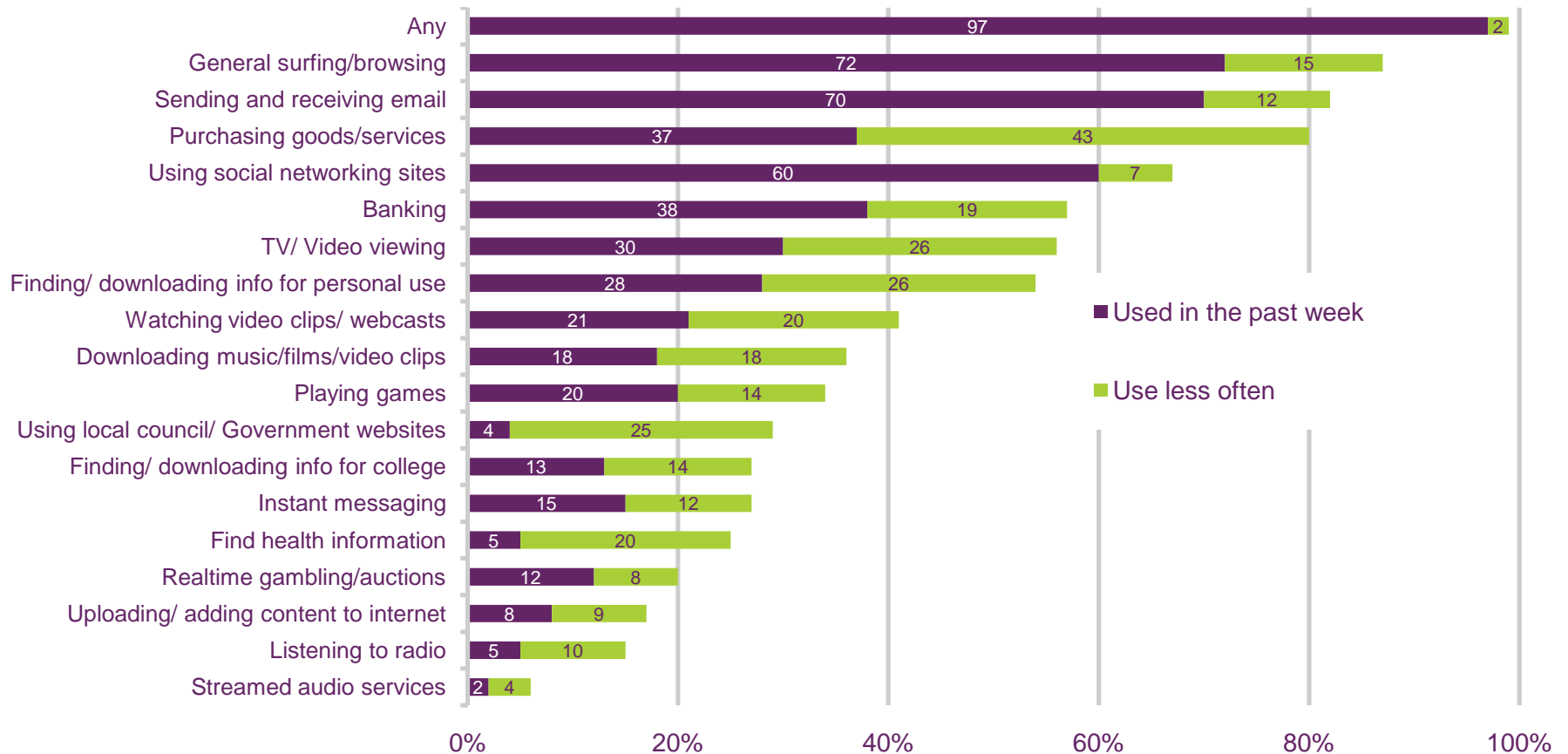
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download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

Use of the internet in Scotland over time



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

Use of online applications among broadband users



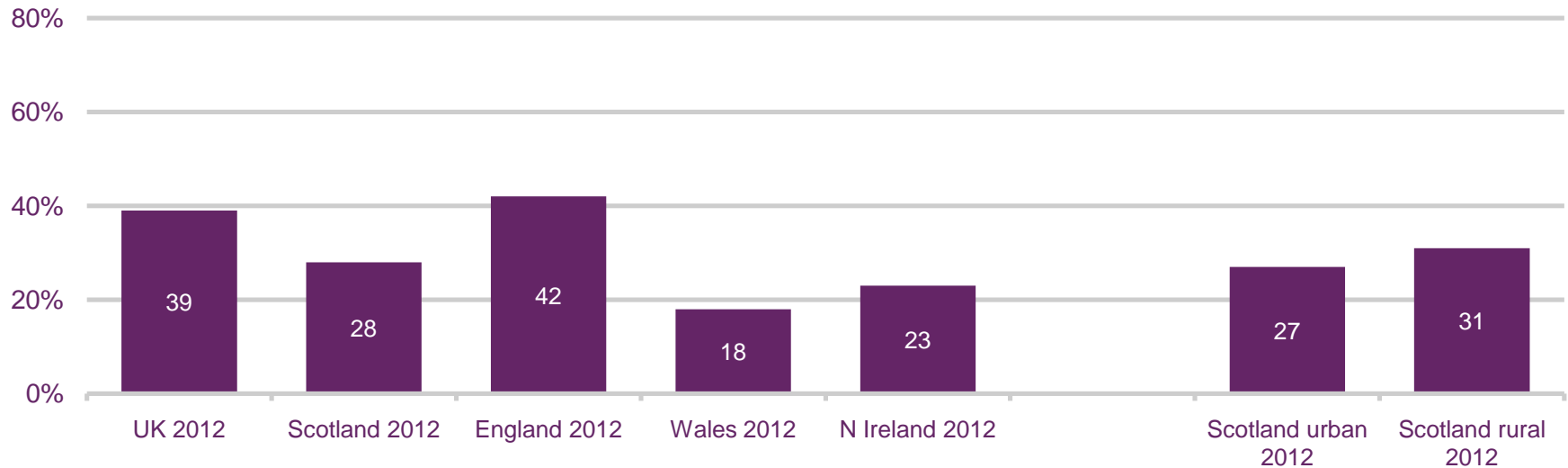
QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with a broadband connection at home (n= 350 Scotland 2012)

Use of the internet to access local council/government websites

Use of internet for local council/government websites (%)



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

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 361 Scotland, 1734 England, 363 Wales, 365 Northern Ireland, 178 Scotland urban, 183 Scotland rural)

Use of the internet to access banking websites



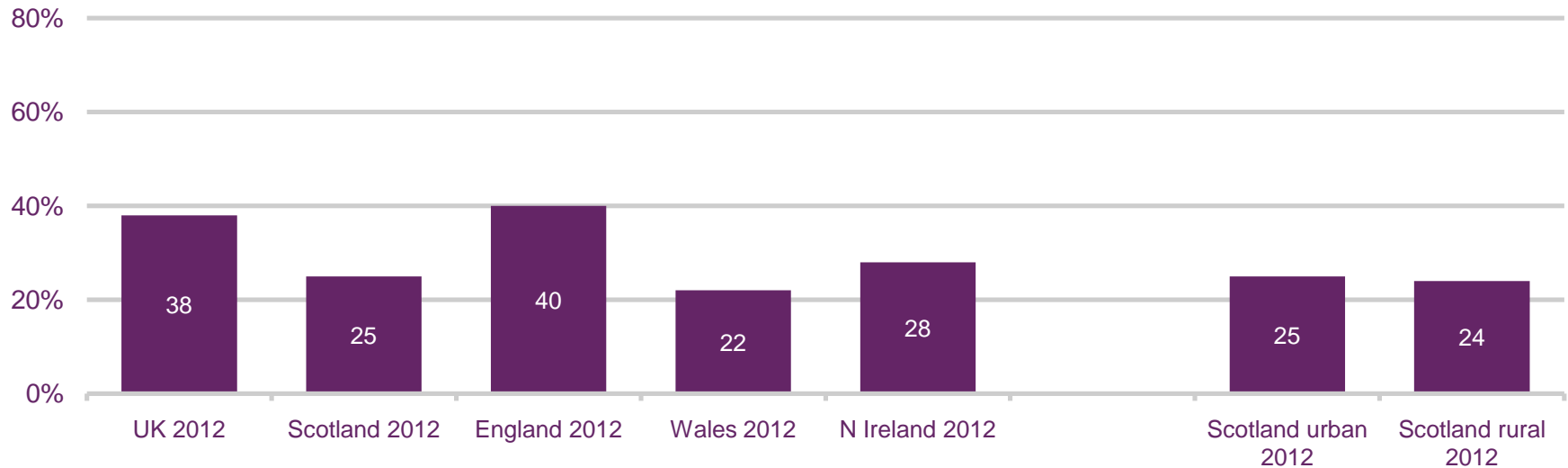
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 361 Scotland, 1734 England, 363 Wales, 365 Northern Ireland, 178 Scotland urban, 183 Scotland rural)

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

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

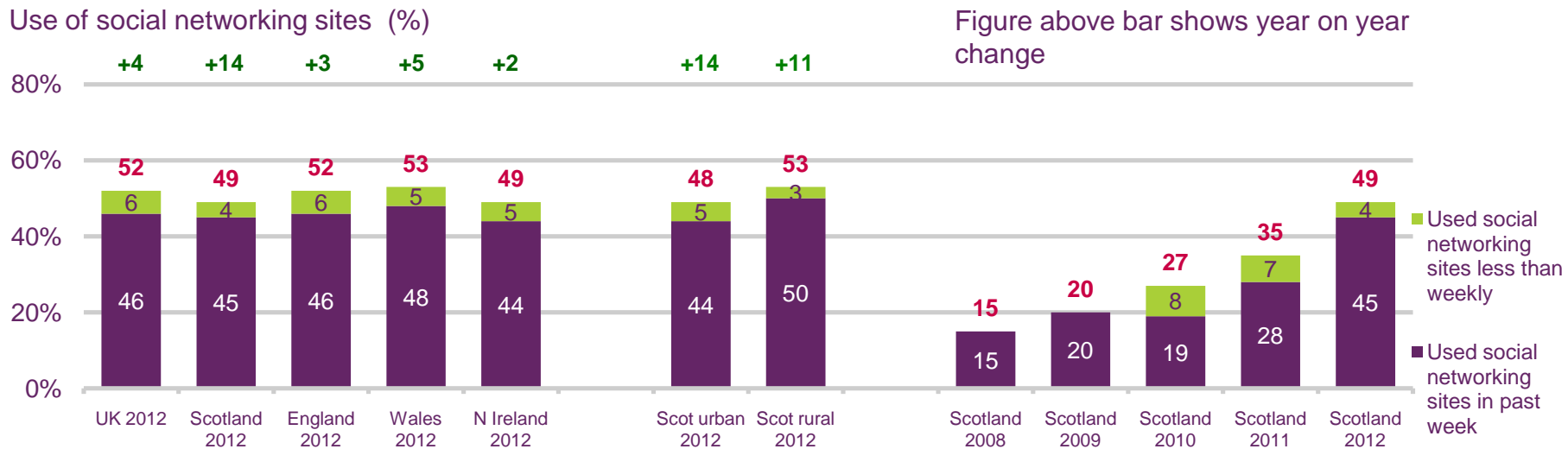


QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 361 Scotland, 1734 England, 363 Wales, 365 Northern Ireland, 178 Scotland urban, 183 Scotland rural)

Use of social networking sites



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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Take-up of Tablet PCs



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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 487 Scotland 2011, 500 Scotland 2012)

Take-up of e-readers

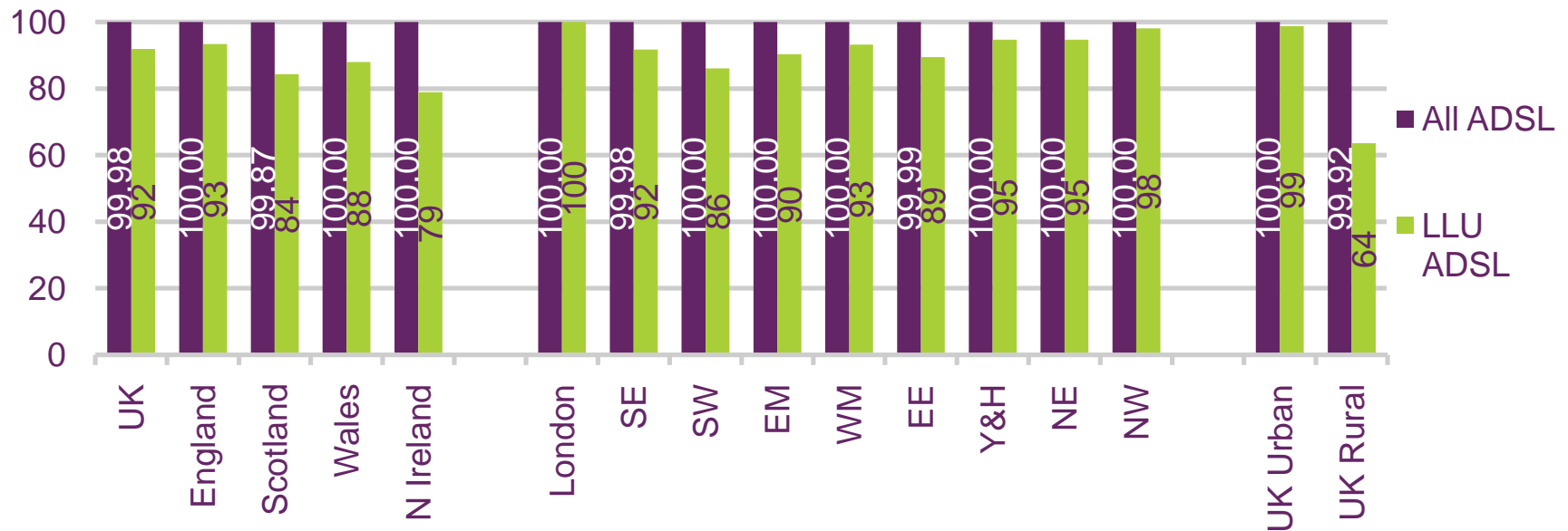


QB1. Which of the following do you ,or does anyone in your household, have in your home at the moment ?/ QB2. And do you personally use.../ QB6. Does your household's e-reader have built-in 3G access to a mobile network?
 Source: Ofcom research, Quarter 1 2012
 Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural)

Telecoms and networks

Proportion of homes connected to ADSL-enabled and unbundled exchanges

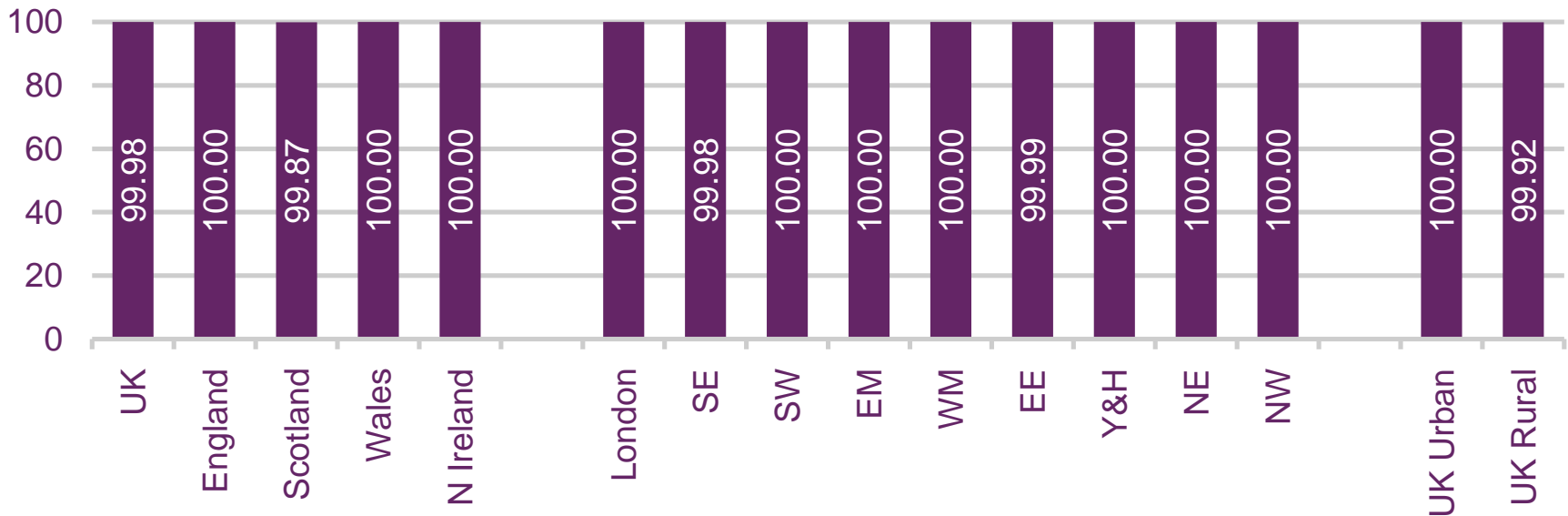
Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

Proportion of households connected to an ADSL-enabled BT exchange

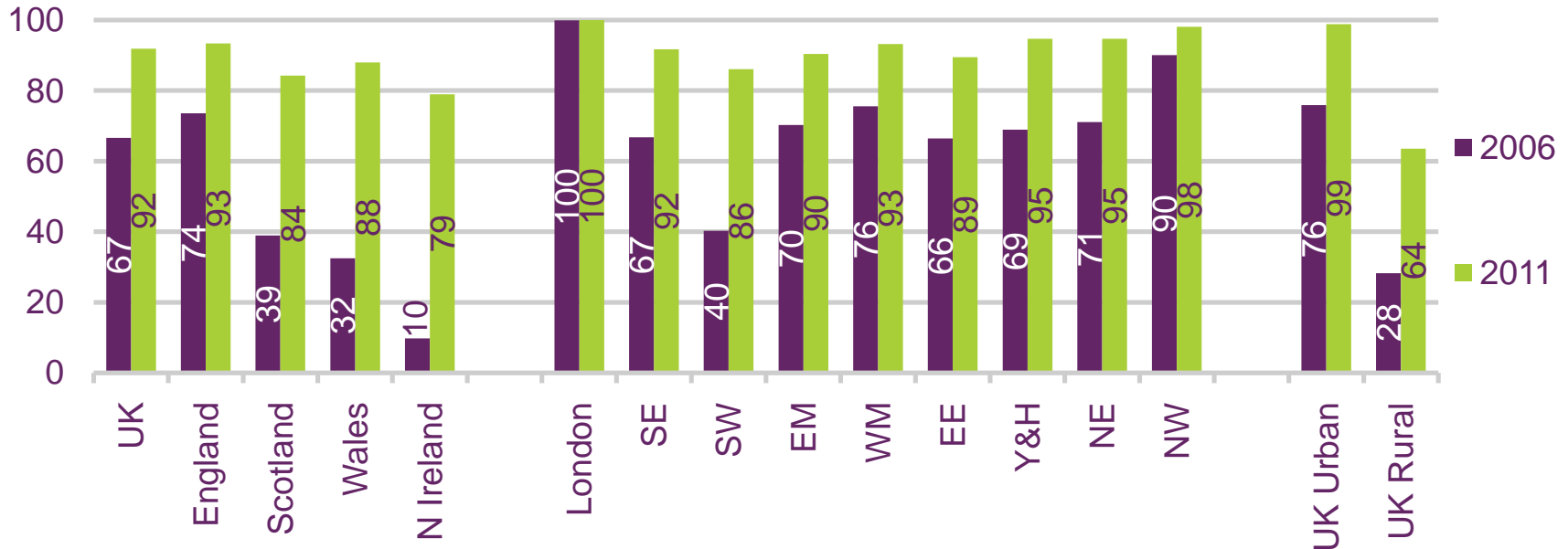
Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

Proportion of households in connected to an unbundled local exchange

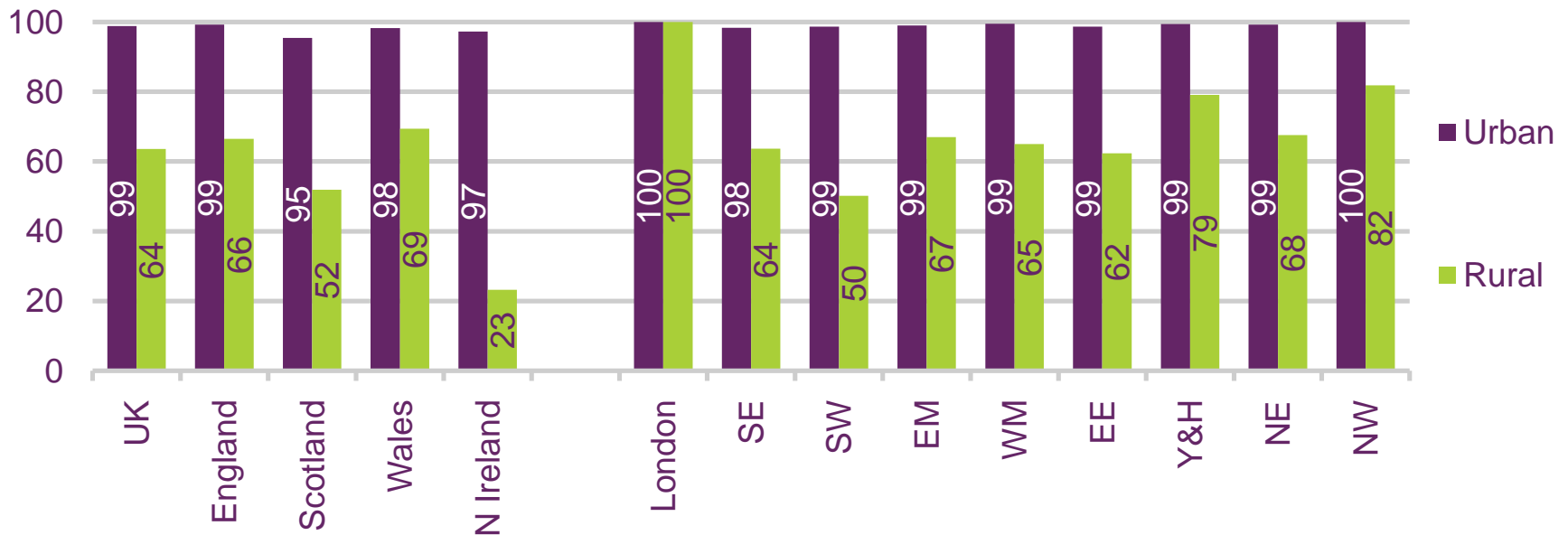
Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

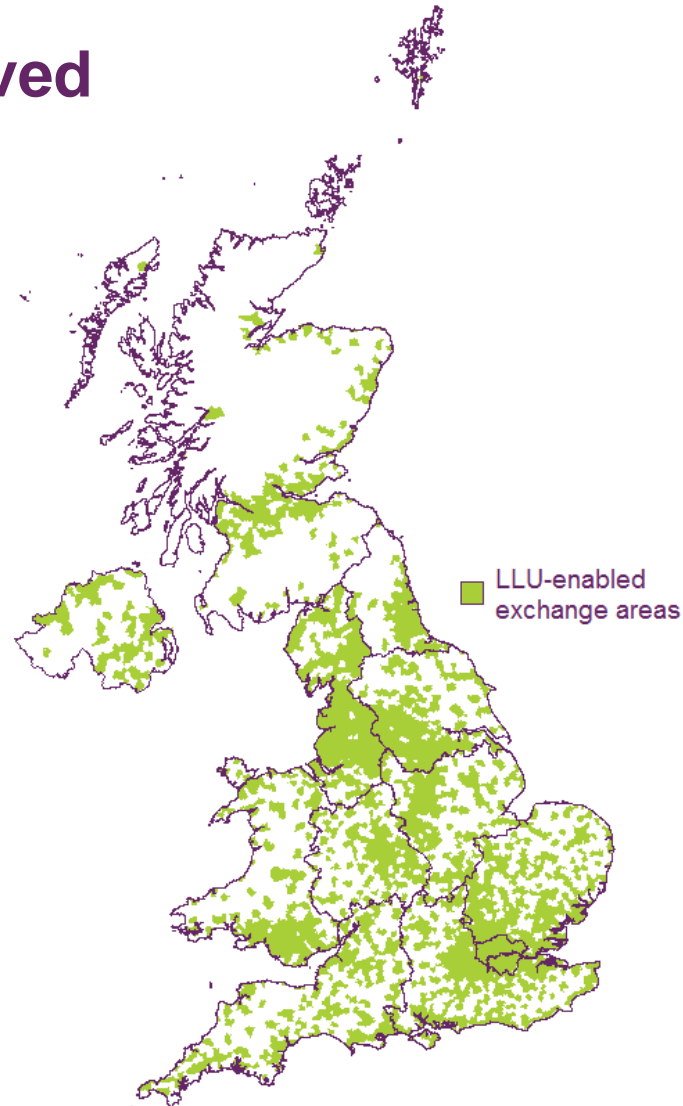
Proportion of households in urban and rural areas connected to an unbundled exchange

Proportion of households (per cent)



Source: Ofcom / BT, December 2011 data

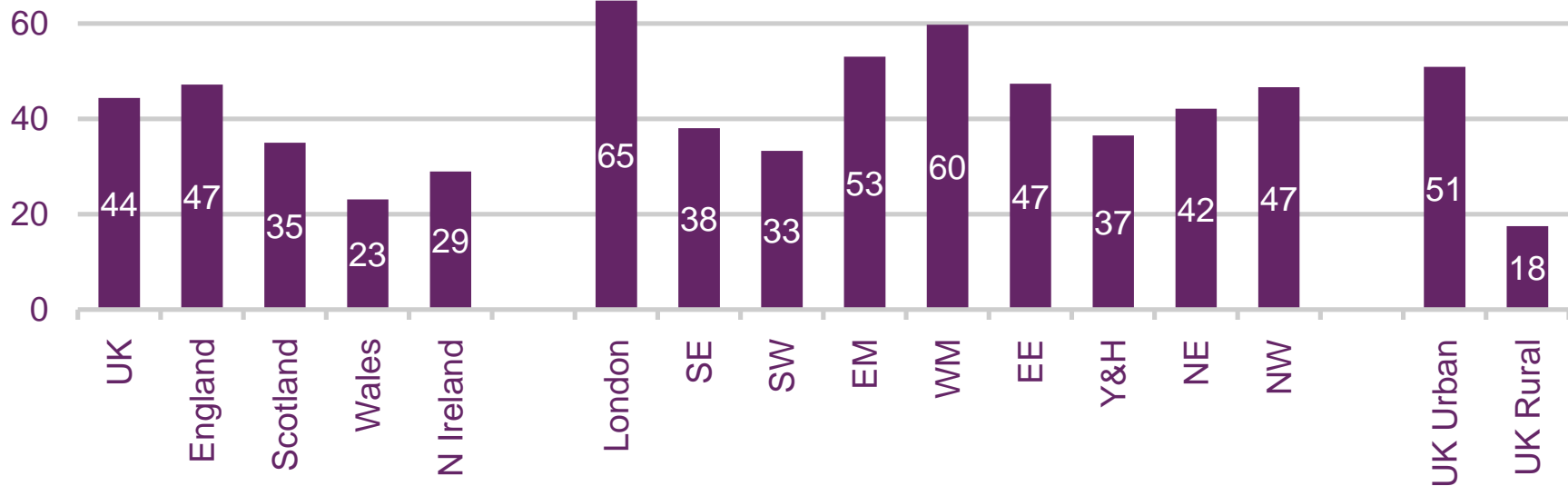
Map showing areas served by unbundled local exchanges



Source: Ofcom / BT, December 2011 data

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

Proportion of households (per cent)

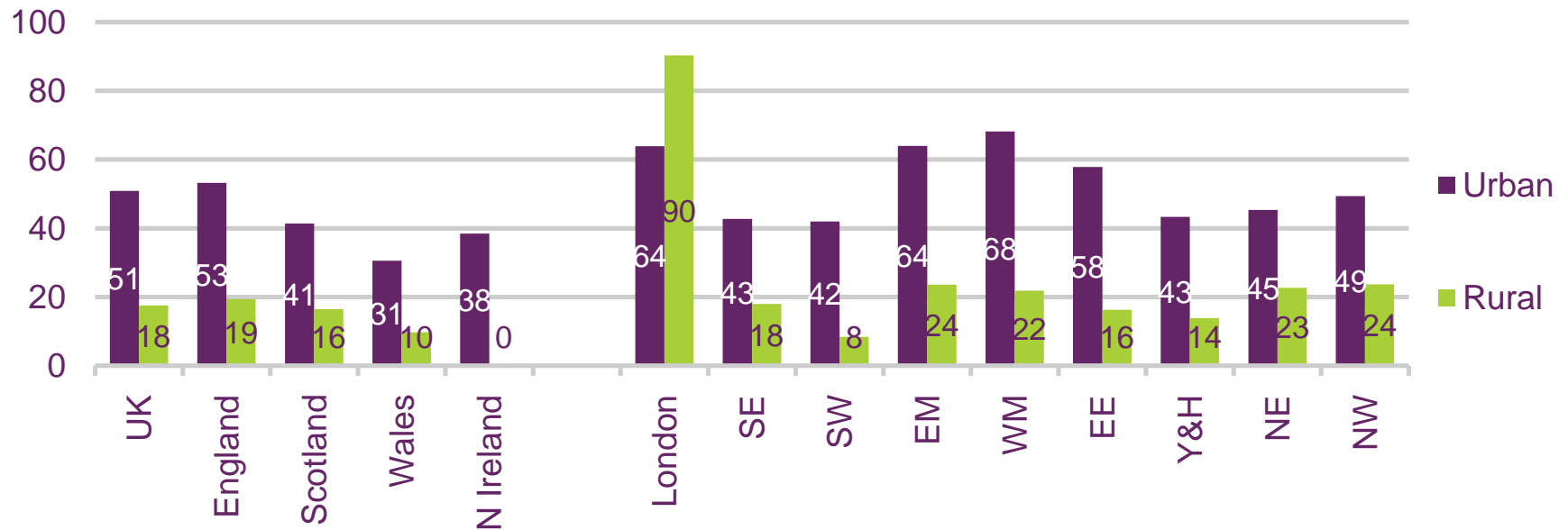


Source: Ofcom / Virgin Media, May 2012 data

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

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

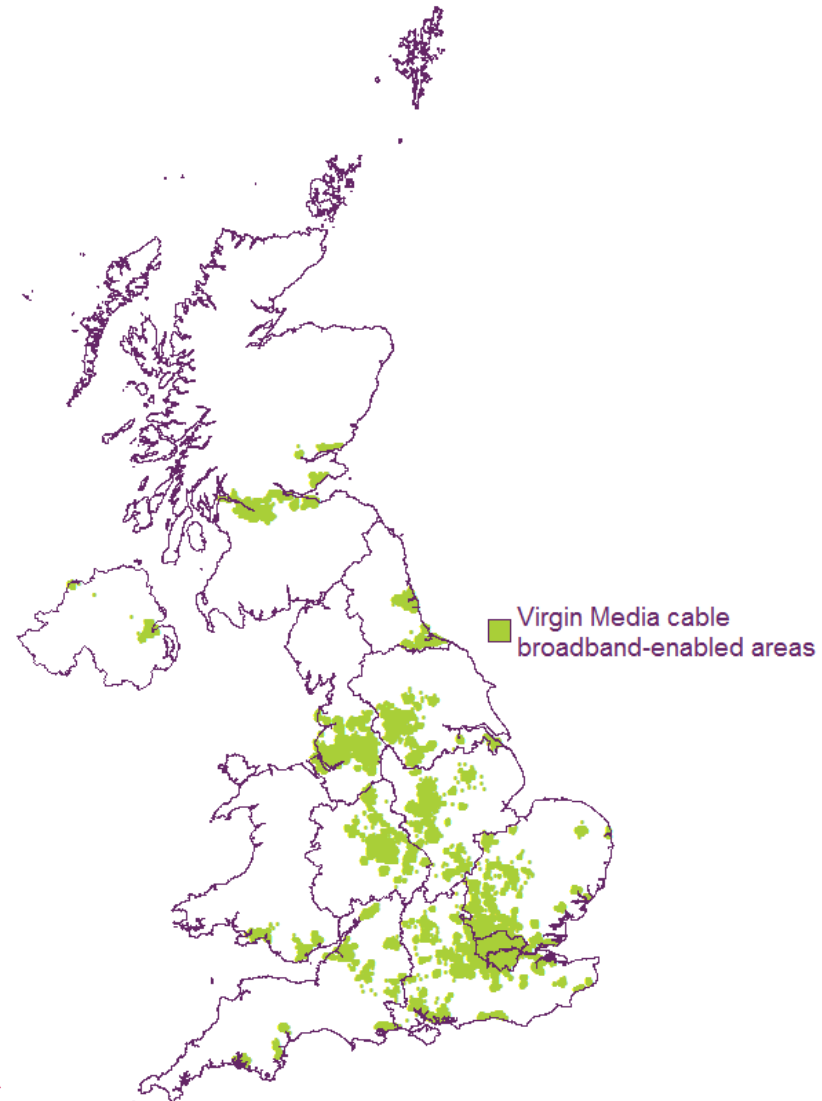
Proportion of households (per cent)



Source: Ofcom / Virgin Media, May 2012 data

Note: Note: Excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV services; London is an anomaly, as there are large areas of Central London which the cable franchisees have not targeted them as they have a low residential population, while areas of Greater London classified as 'rural' typically have a much higher population density than other rural areas of the UK).

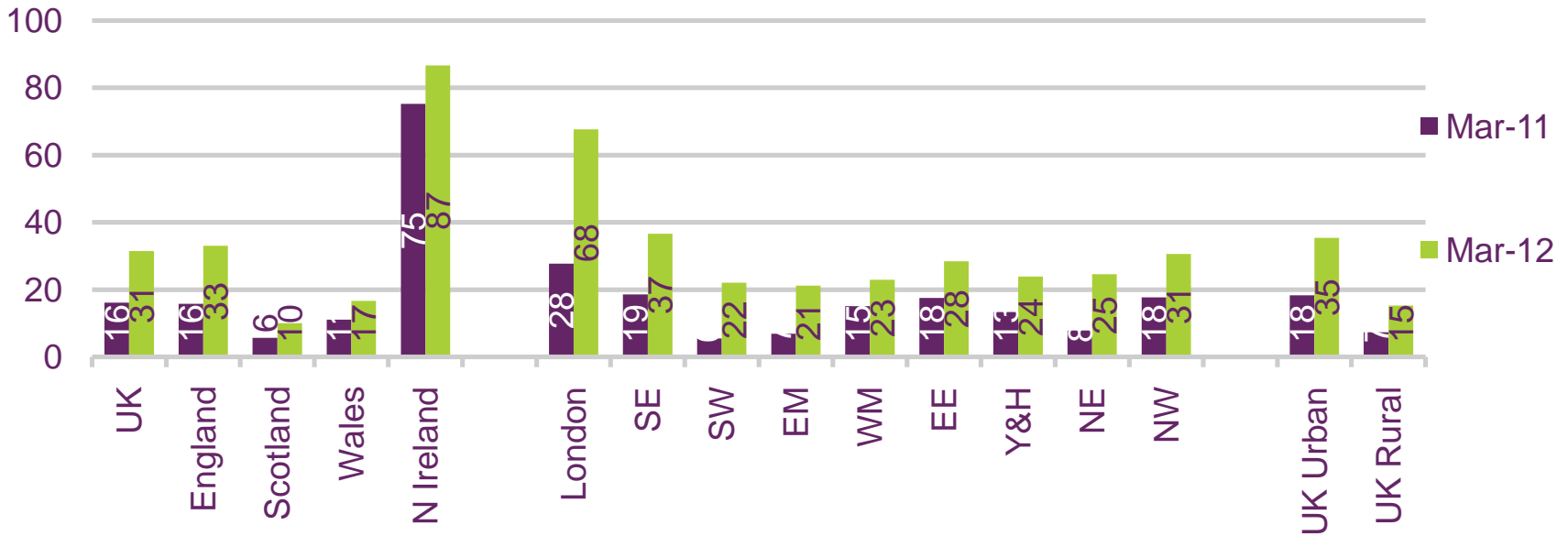
Map of the availability of Virgin Media's cable broadband network



Source: Ofcom / Virgin Media, May 2012 data

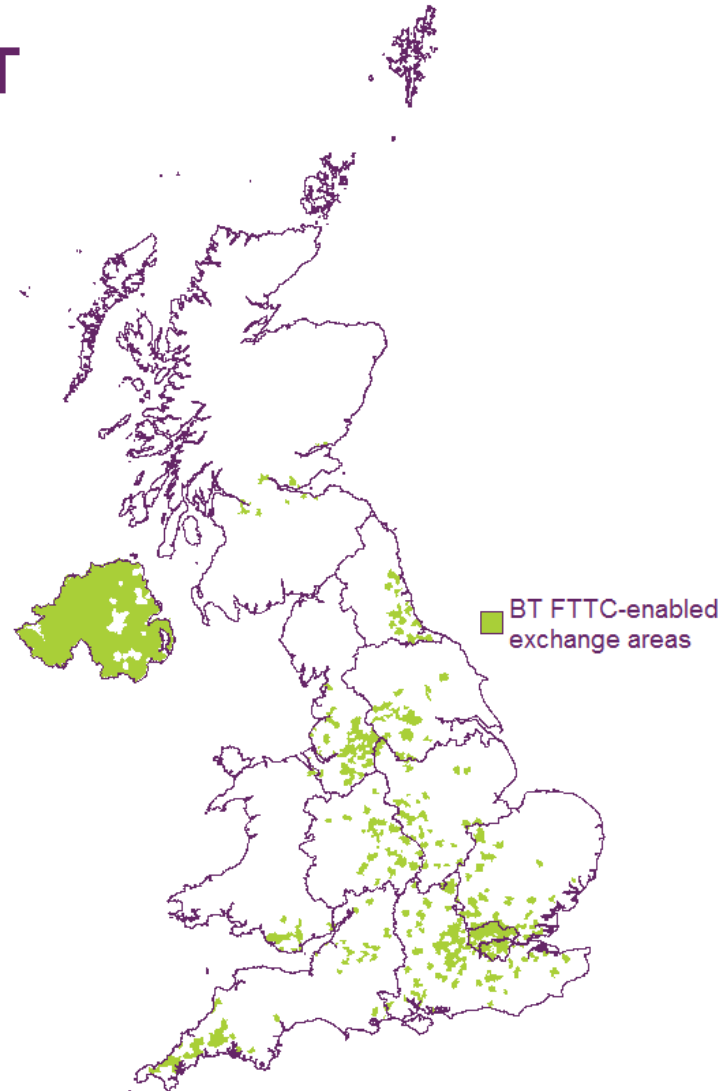
Estimated proportion of households able to receive FTTC services

Proportion of households (per cent)



Source: Ofcom / BT

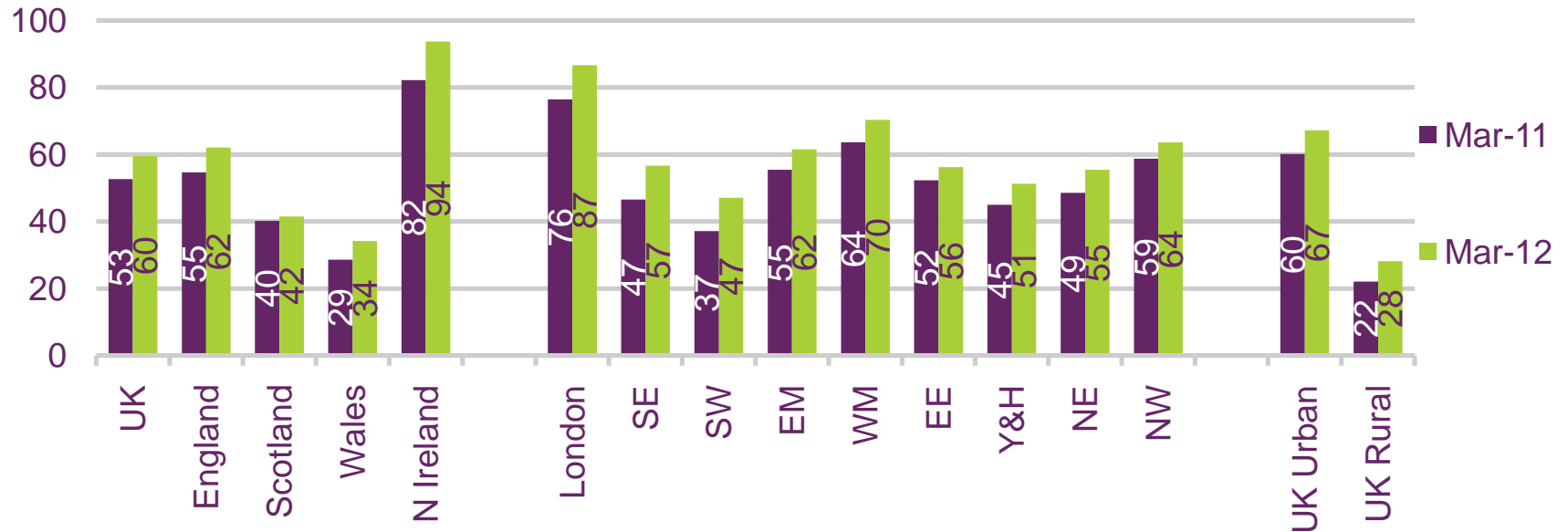
Map of FTTC-enabled BT exchange areas



Source: Ofcom / BT, March 2012 data

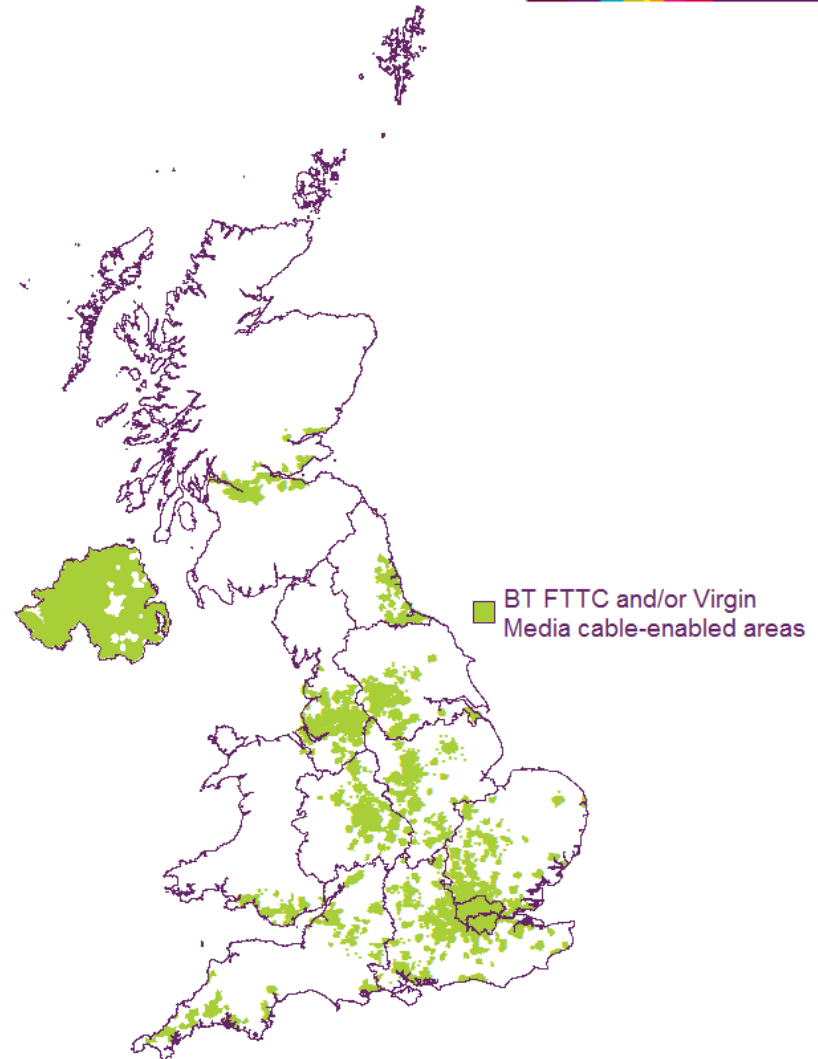
Estimated proportion of households able to receive superfast broadband services

Proportion of households (per cent)



Source: Ofcom / BT / Virgin Media

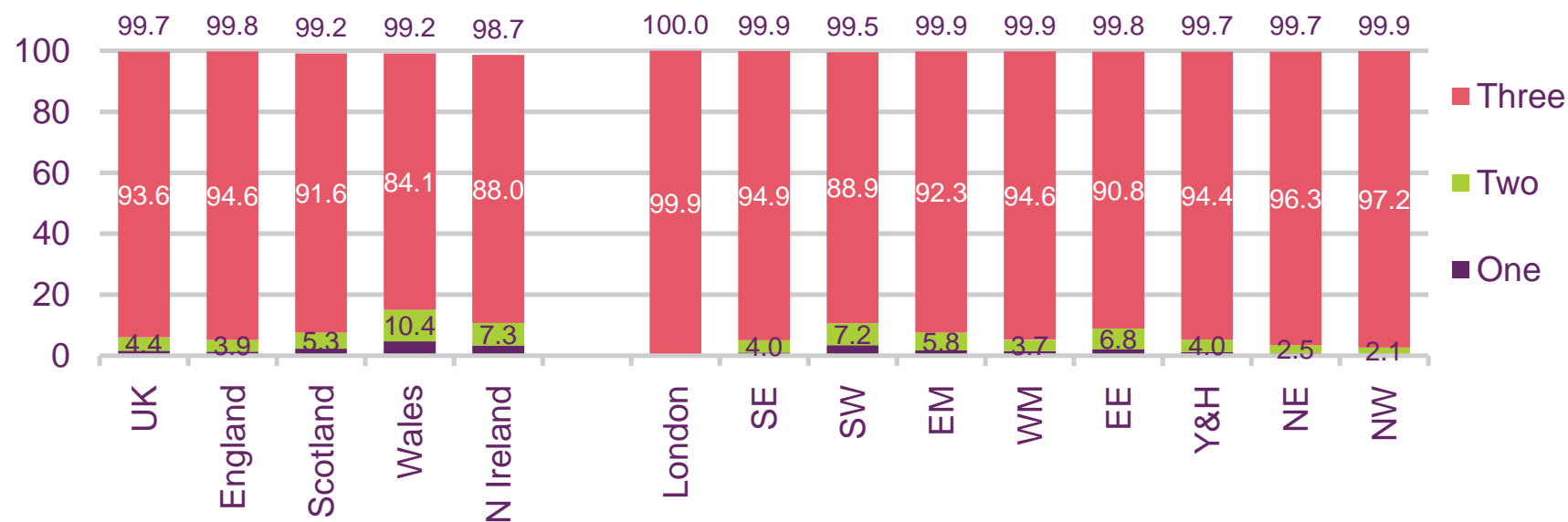
Map of super-fast broadband availability



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

Premises covered by 2G mobile, by number of operators

Proportion of premises (per cent)

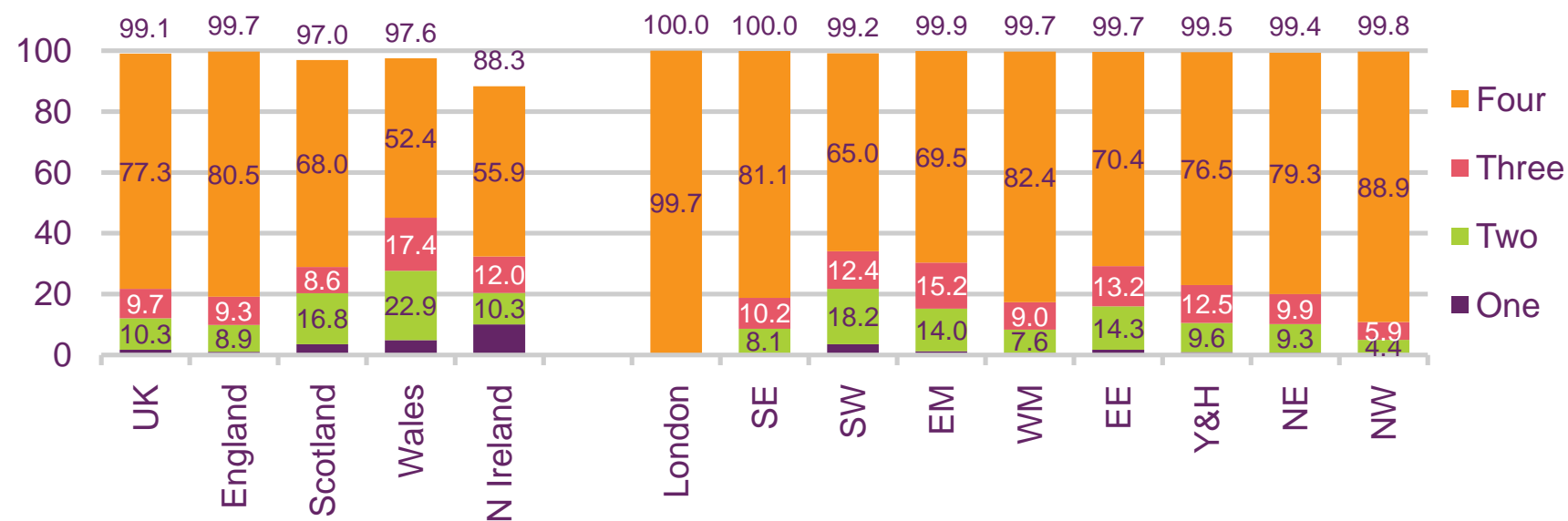


Source: Ofcom based on operator data.

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

Premises covered by 3G mobile, by number of operators

Proportion of premises (per cent)

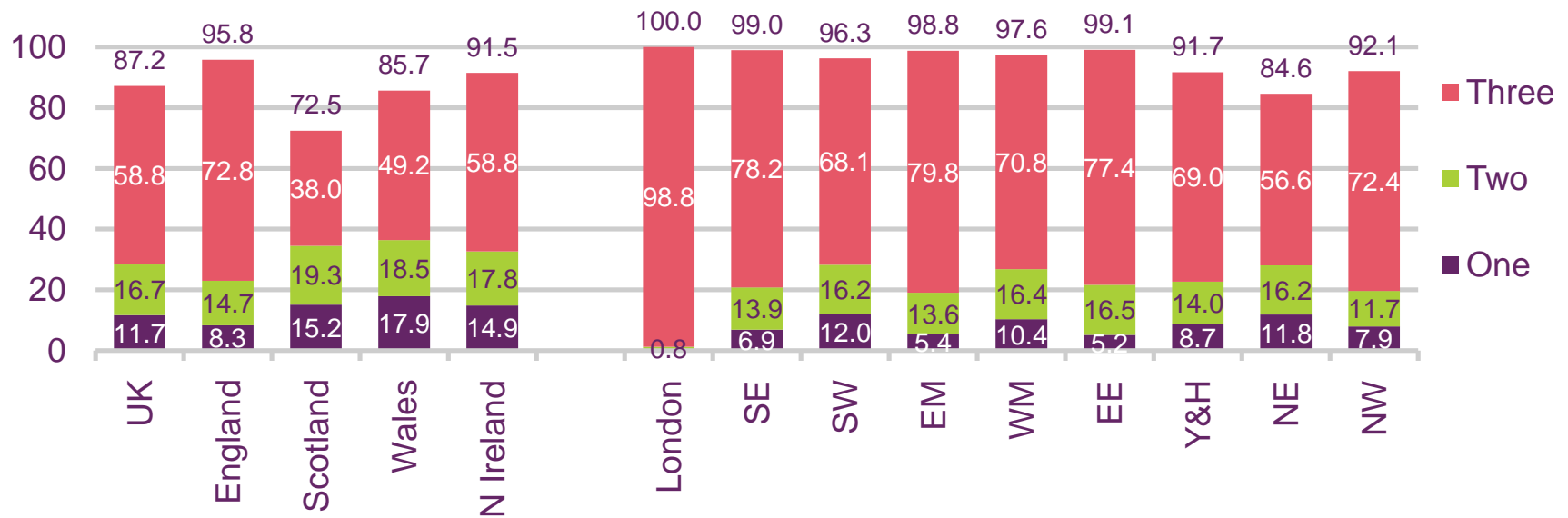


Source: Ofcom based on operator data.

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

Geographic area covered by 2G mobile by number of operators

Proportion of geographic area (per cent)

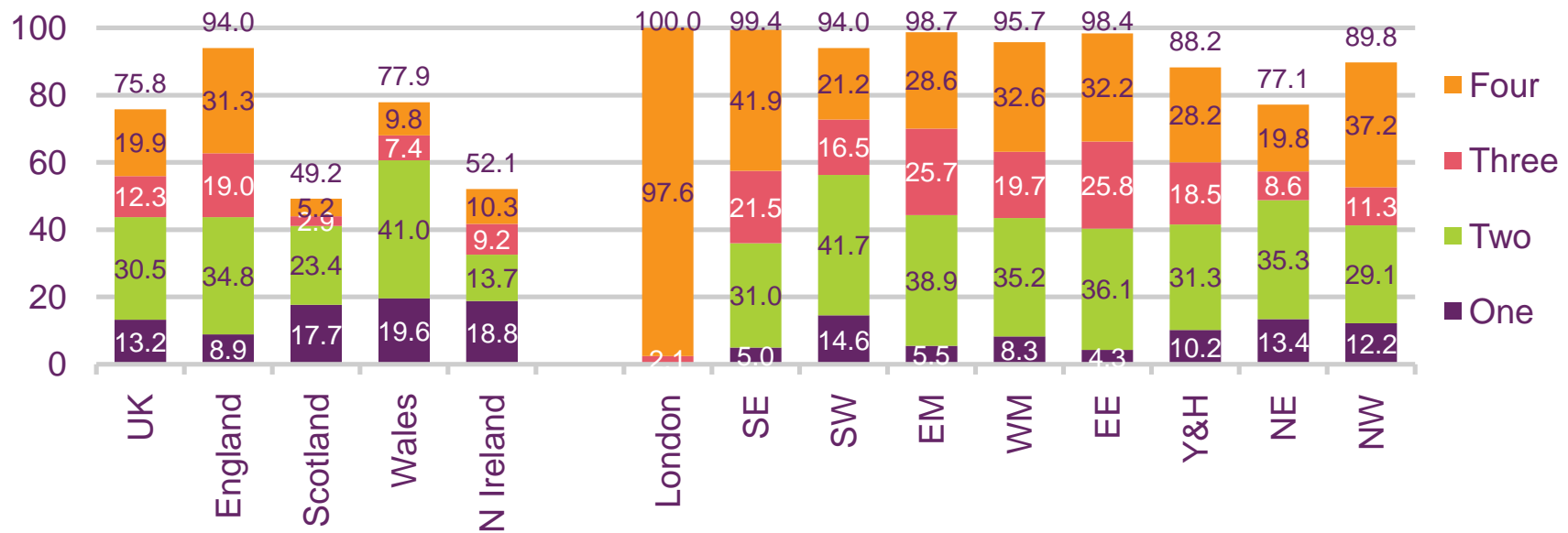


Source: Ofcom based on operator data.

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

Geographic area covered by 3G mobile by number of operators

Proportion of geographic area (per cent)



Source: Ofcom based on operator data.

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

Take-up of communications services, 2012

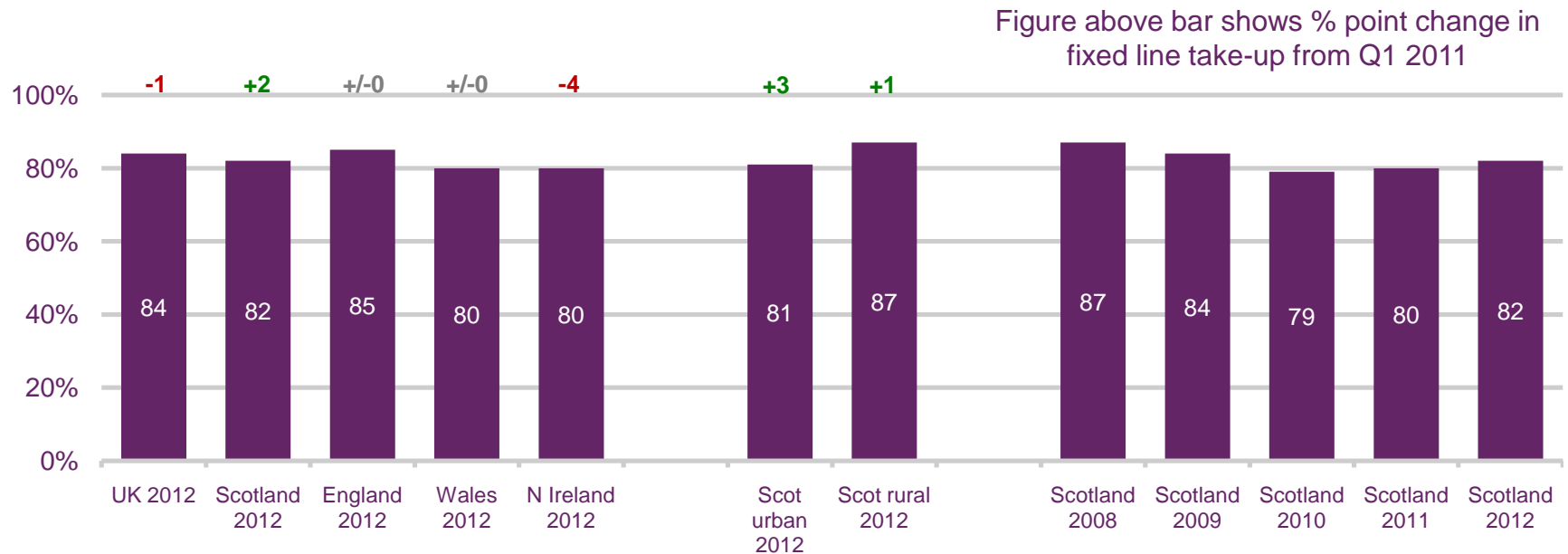
	UK	Scotland	England	Wales	N Ireland	Scotland urban	Scotland rural
Individual							
Voice telephony Fixed Line	84%	82%	85%	80%	80%	81%	87%
Mobile phone	92%	85%	93%	92%	93%	84%	89%
Smartphone	39%	32%	40%	39%	34%	33%	32%
Internet Computer (any type)	79%	70%	80%	71%	73%	68%	78%
Tablet computer	11%	11%	11%	8%	9%	11%	10%
Total Internet	80%	71%	81%	74%	73%	69%	79%
Broadband (fixed and mobile)	76%	68%	78%	68%	69%	67%	76%
Fixed Broadband	72%	64%	73%	63%	66%	63%	72%
Mobile Broadband	13%	12%	13%	16%	7%	11%	17%

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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural)

Fixed line take-up



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

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Mobile take-up



QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Cross-ownership of household telephony services

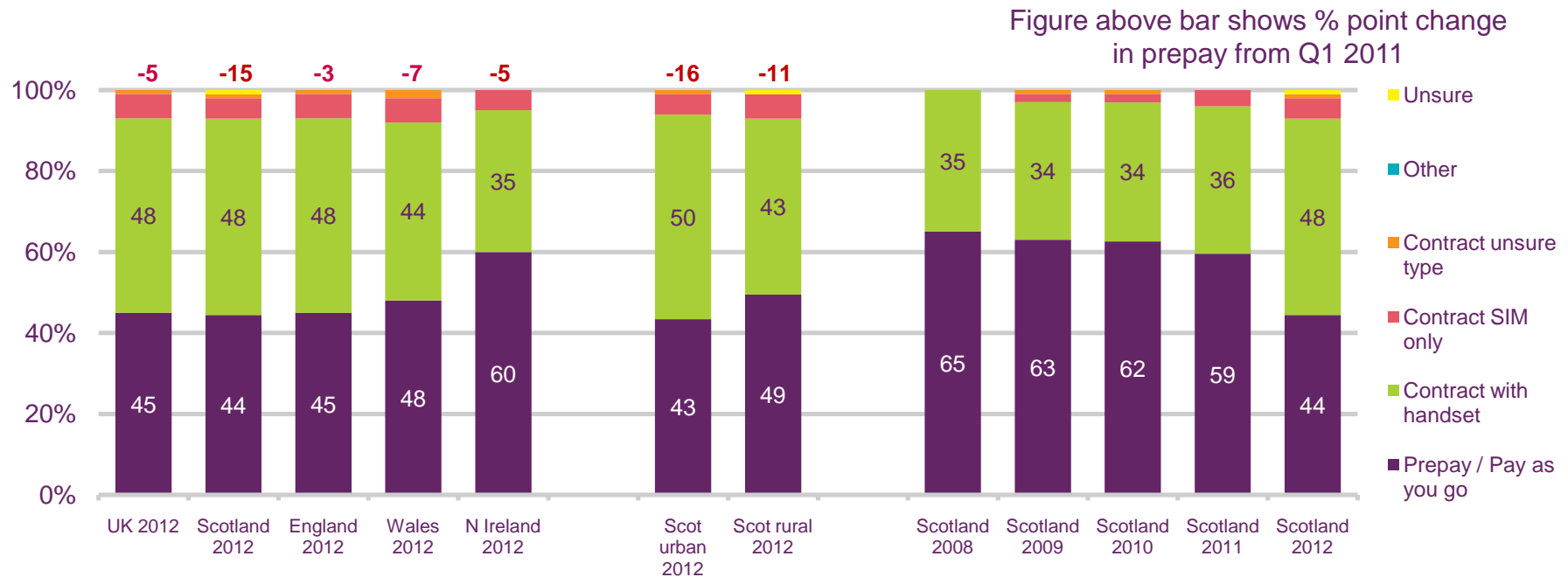


QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Type of mobile subscription

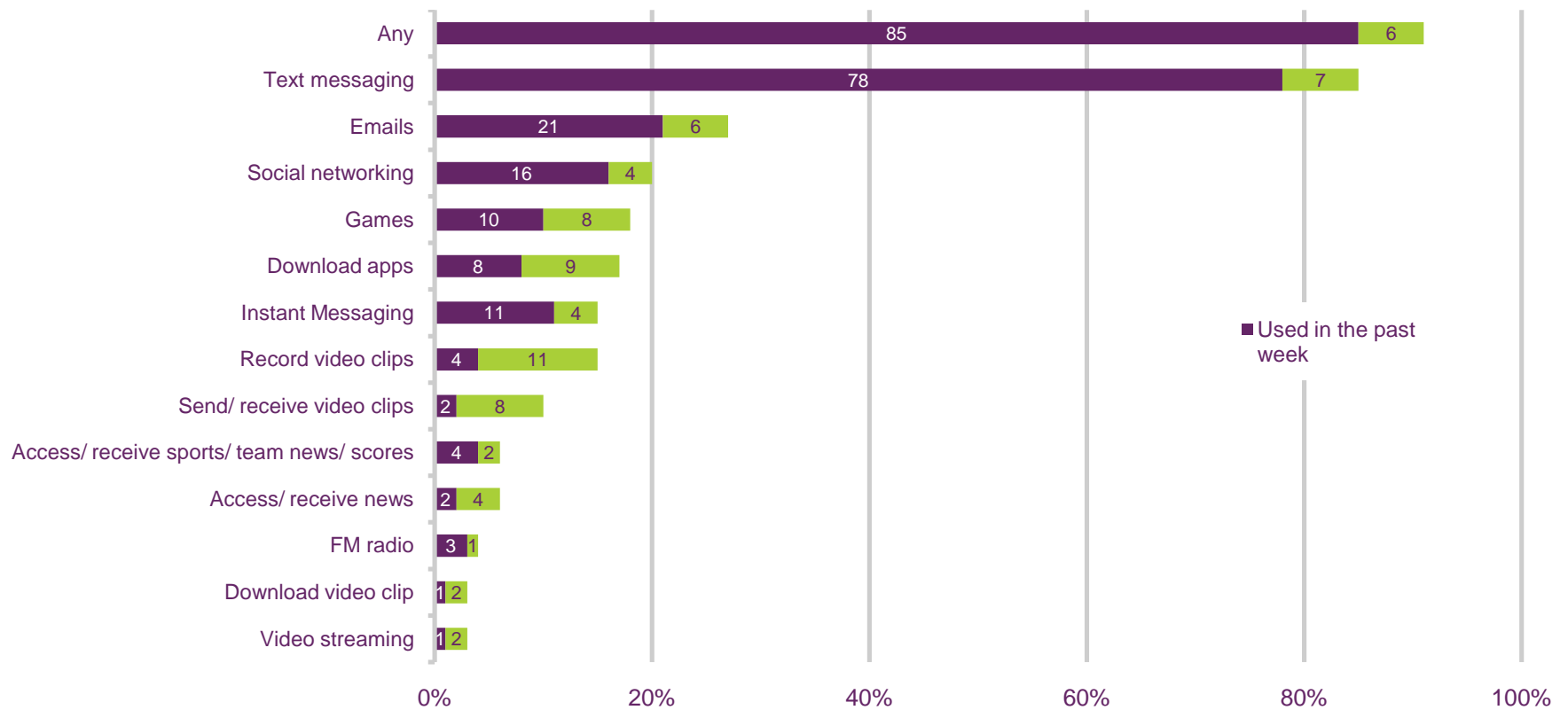


QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 430 Scotland, 2043 England, 456 Wales, 463 Northern Ireland, 220 Scotland urban, 210 Scotland rural, 744 Scotland 2008, 877 Scotland 2009, 1237 Scotland 2010, 425 Scotland 2011, 430 Scotland 2012)

Use of mobile applications



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

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n= 430 Scotland 2012)

Take-up of smartphones

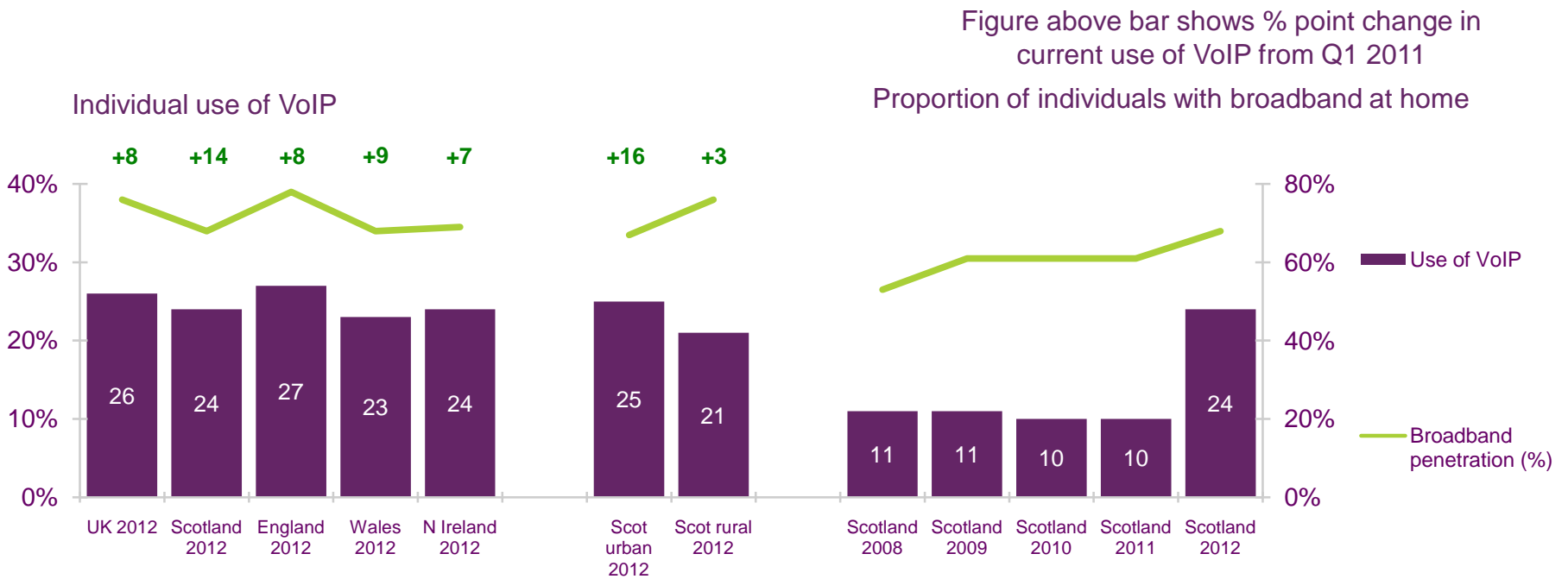


QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the HTC Desire.

Source: Ofcom research, Quarter 1 2012

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

Individual use of Voice over IP

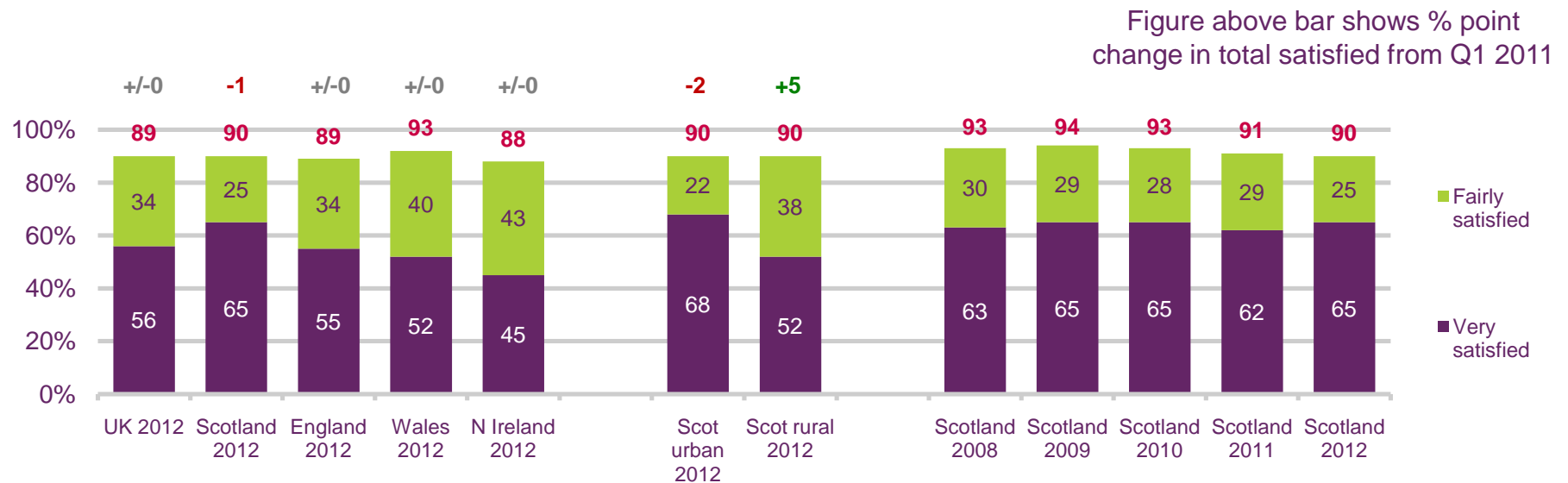


QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?

Source: Ofcom research, Quarter 1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012)

Overall satisfaction with fixed line services



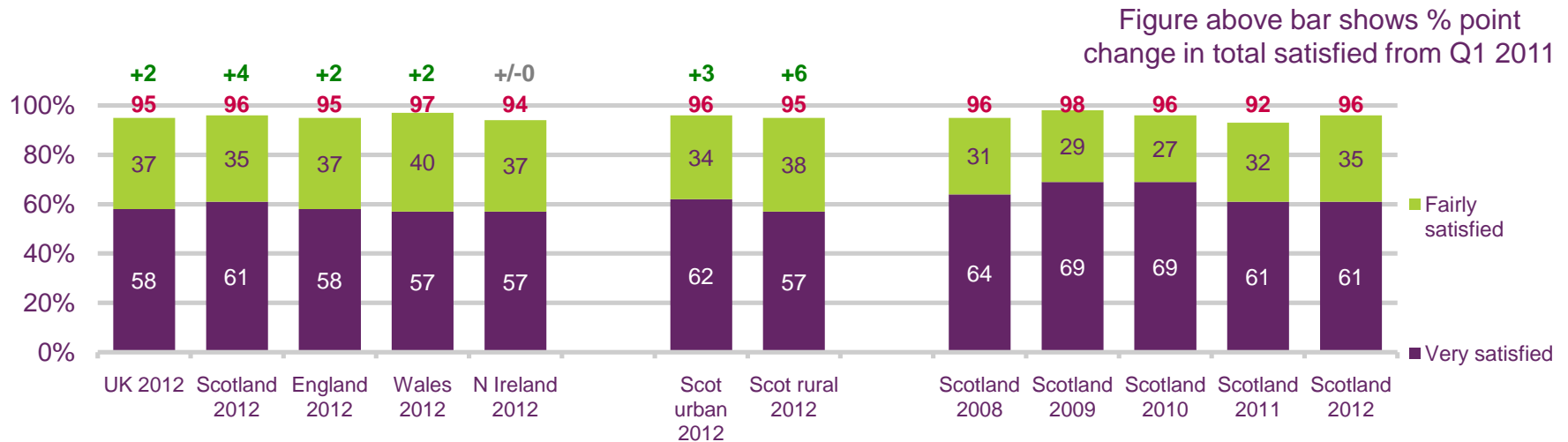
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with a landline phone at home (n = 3177 UK, 420 Scotland, 1923 England, 419 Wales, 415 Northern Ireland, 215 Scotland urban, 205 Scotland rural, 793 Scotland 2008, 804 Scotland 2009, 1411 Scotland 2010, 400 Scotland 2011, 420 Scotland 2012)

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

Overall satisfaction with mobile phone service



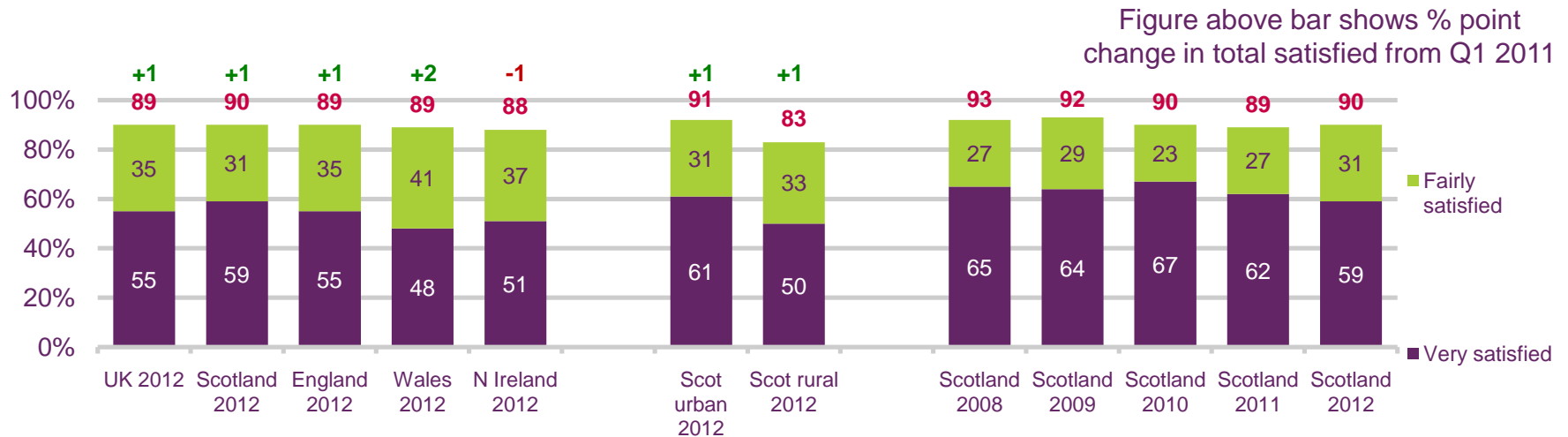
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 430 Scotland, 2043 England, 456 Wales, 463 Northern Ireland, 220 Scotland urban, 210 Scotland rural, 744 Scotland 2008, 877 Scotland 2009, 1237 Scotland 2010, 425 Scotland 2011, 430 Scotland 2012)

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

Satisfaction with reception of mobile service



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

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a mobile phone (n = 3392 UK, 430 Scotland, 2043 England, 456 Wales, 463 Northern Ireland, 220 Scotland urban, 210 Scotland rural, 744 Scotland 2008, 877 Scotland 2009, 1237 Scotland 2010, 425 Scotland 2011, 430 Scotland 2012)

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

Satisfaction with ability to connect to the internet via 3G network



QD21k. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for ability to connect to the internet using the mobile network (3G)?

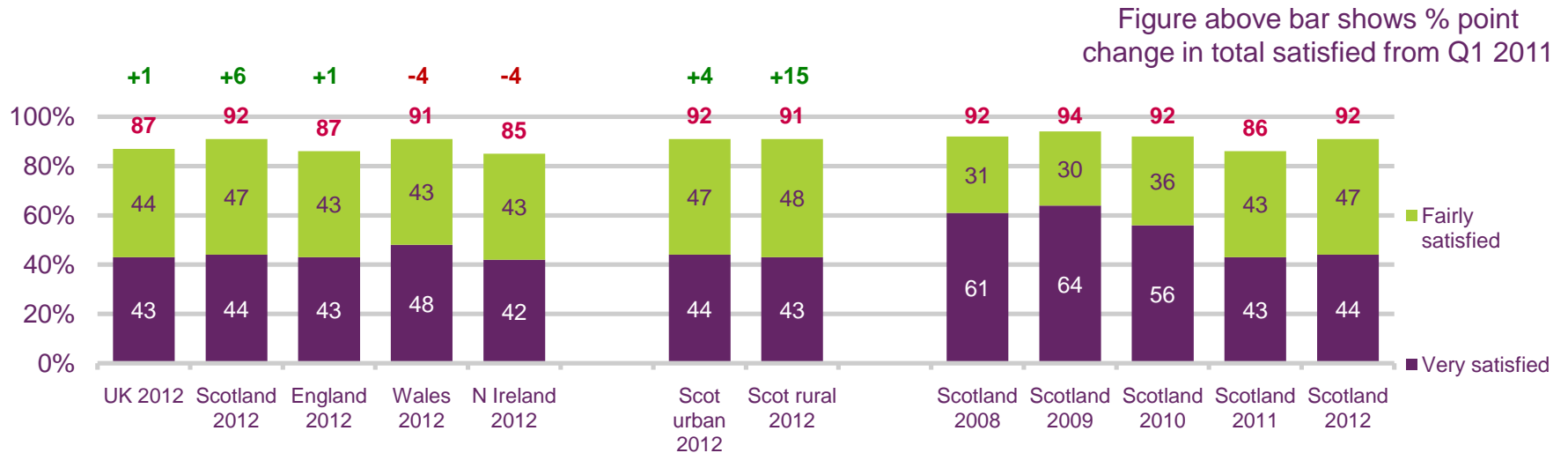
Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ who personally use a smartphone (n = 1302 UK, 157 Scotland, 809 England, 174 Wales, 162 Northern Ireland, 83 Scotland urban, 74 Scotland rural)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with the ability to connect to the internet using the mobile network

*Caution: Low base

Overall satisfaction with fixed broadband service



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

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2556 UK, 330 Scotland, 1577 England, 318 Wales, 331 Northern Ireland, 163 Scotland urban, 167 Scotland rural, 489 Scotland 2008, 528 Scotland 2009, 778 Scotland 2010, 294 Scotland 2011, 330 Scotland 2012)

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

Satisfaction with speed of fixed broadband connection



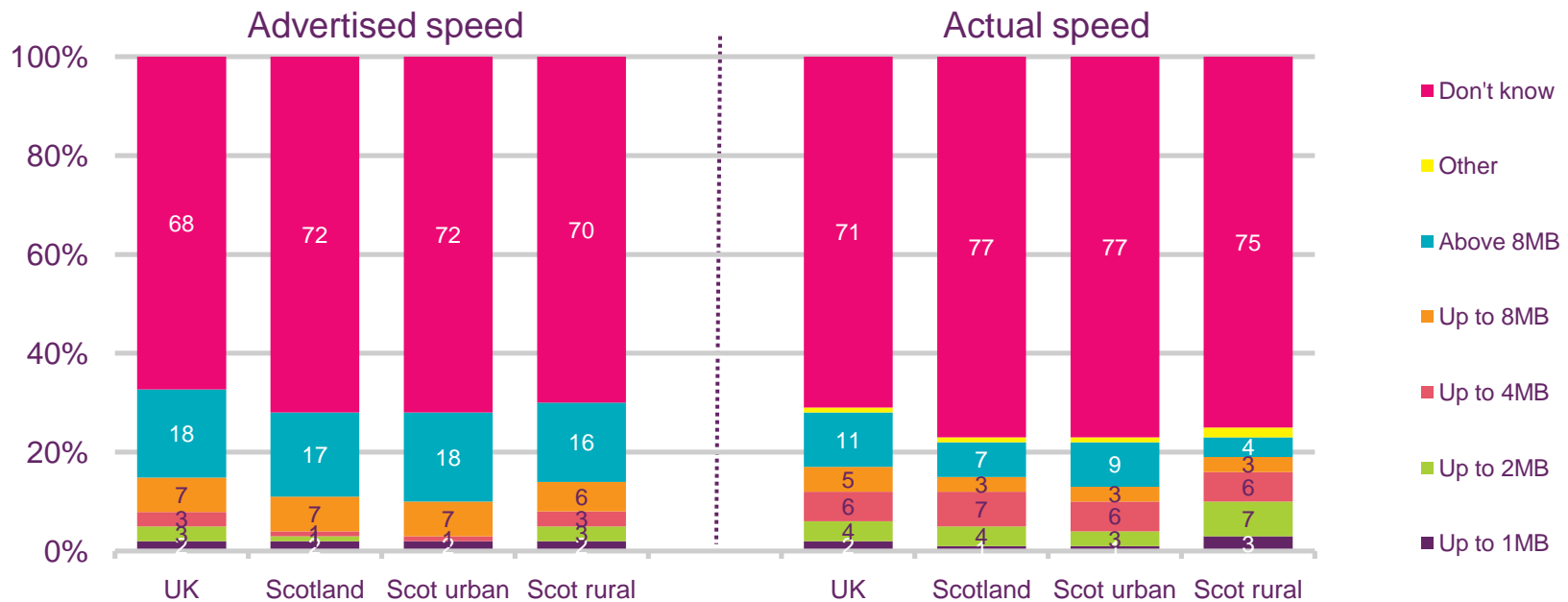
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2556 UK, 330 Scotland, 1577 England, 318 Wales, 331 Northern Ireland, 163 Scotland urban, 167 Scotland rural, 489 Scotland 2008, 528 Scotland 2009, 778 Scotland 2010, 294 Scotland 2011, 330 Scotland 2012)

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

Awareness of advertised and actual broadband speeds in Scotland



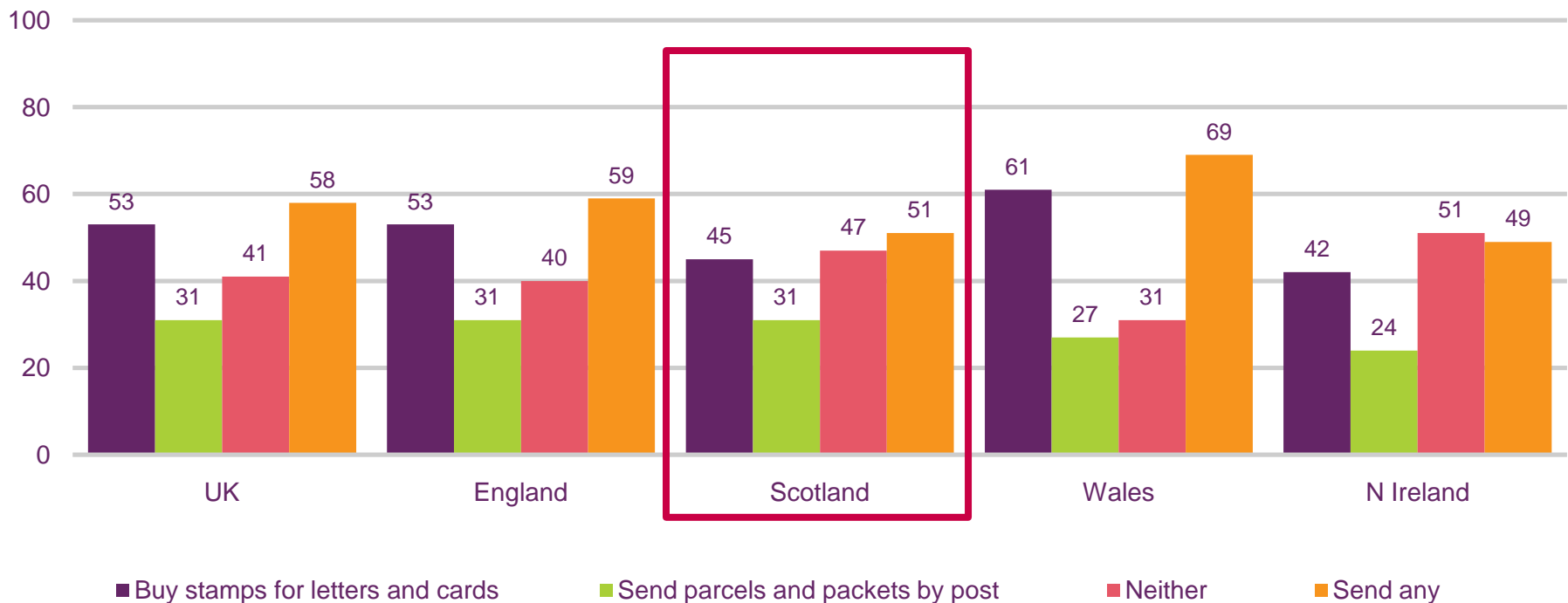
QE17. What was the advertised speed of your main home internet connection when you took up your service?/ QE16. What is the actual speed of your main home internet connection?

Source: Ofcom research, Quarter 1 2012

Base: Adults aged 16+ with broadband connection at home (n = 2726 UK, 350 Scotland, 173 Scotland urban, 177 Scotland rural)

Post

Regular use of postage stamps and postal services products by nation



Source: Ofcom Attitudes toward spending research, 2012

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

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

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



Source: Ofcom omnibus research, December 2011

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

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

Approximate number of letters and cards received per week

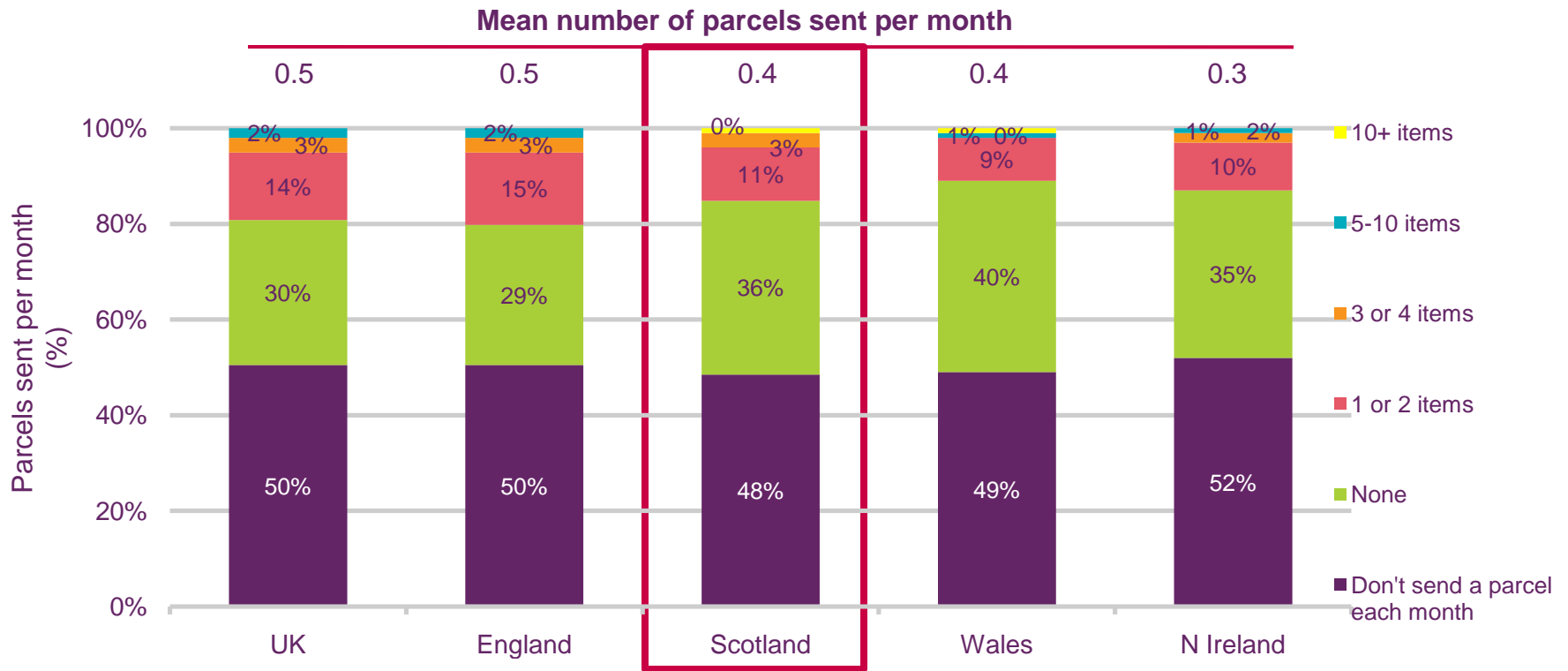


Source: Ofcom omnibus research, December 2011

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

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

Approximate number of parcels sent per month - personal mail



Source: Ofcom omnibus research, December 2011

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

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

Approximate number of parcels received per month - personal mail



Source: Ofcom omnibus research, December 2011

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

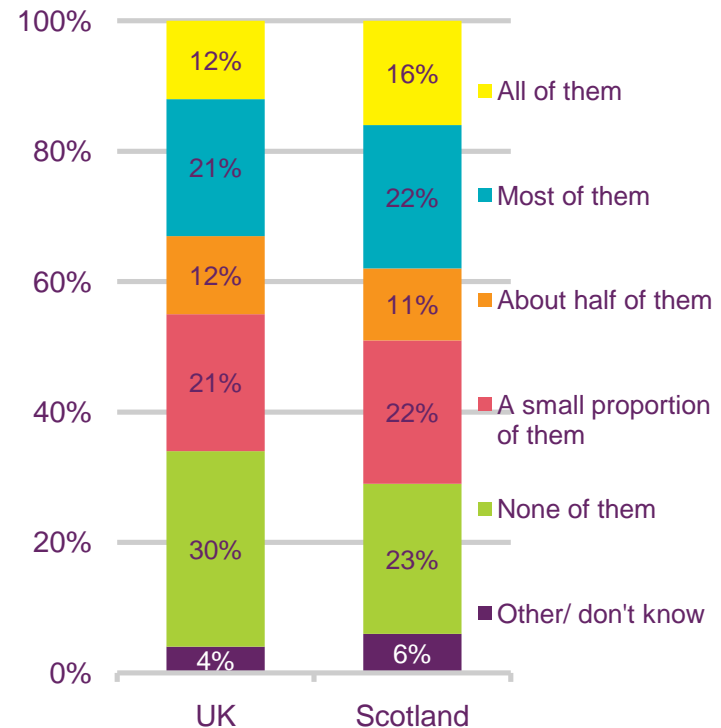
Q. Approximately how many parcels do you receive in an average month?

Use of First and Second class post

Use of first and second class for letters



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

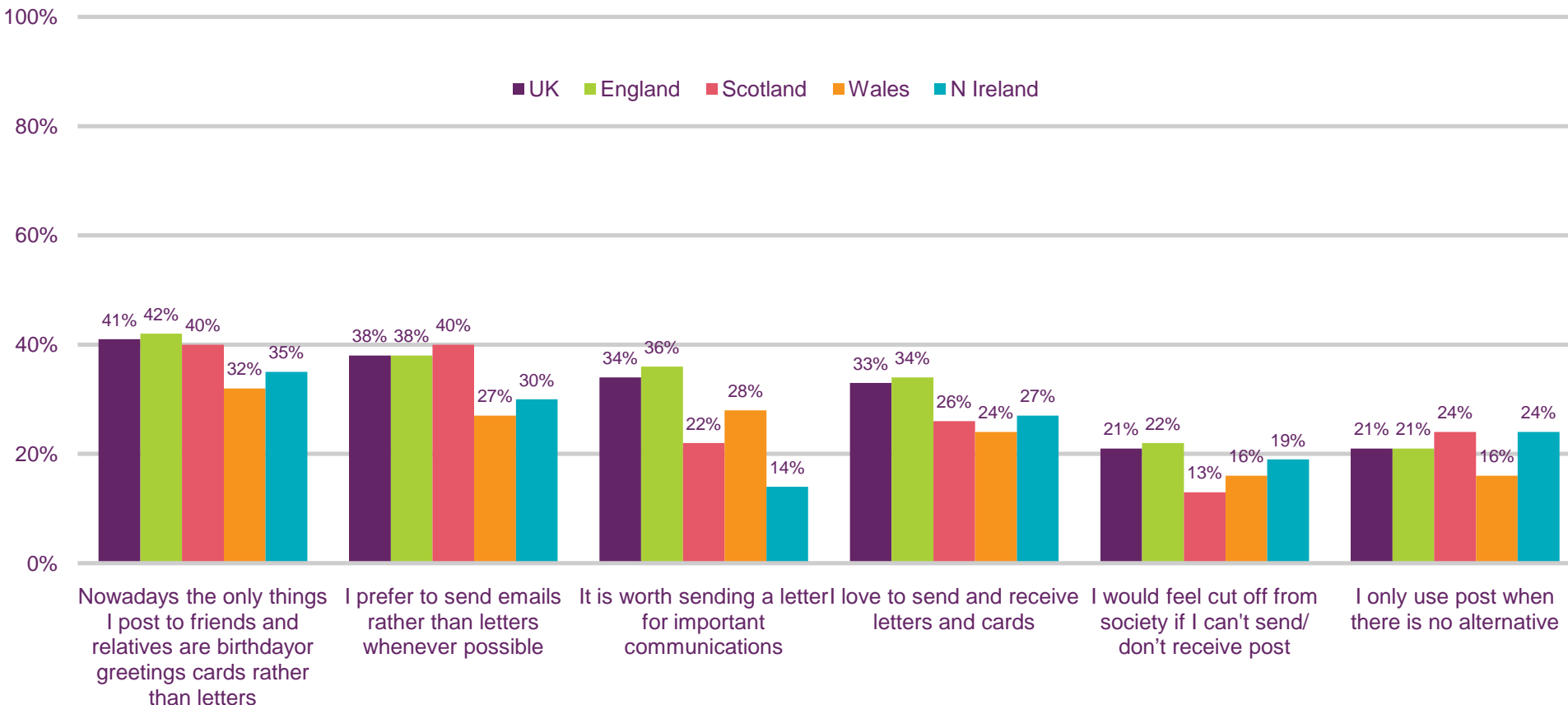


Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post in Scotland (n = 232)

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

Agreement with statements about post



Source: Ofcom omnibus research, December 2011

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

Q. Which of these statements apply to you?