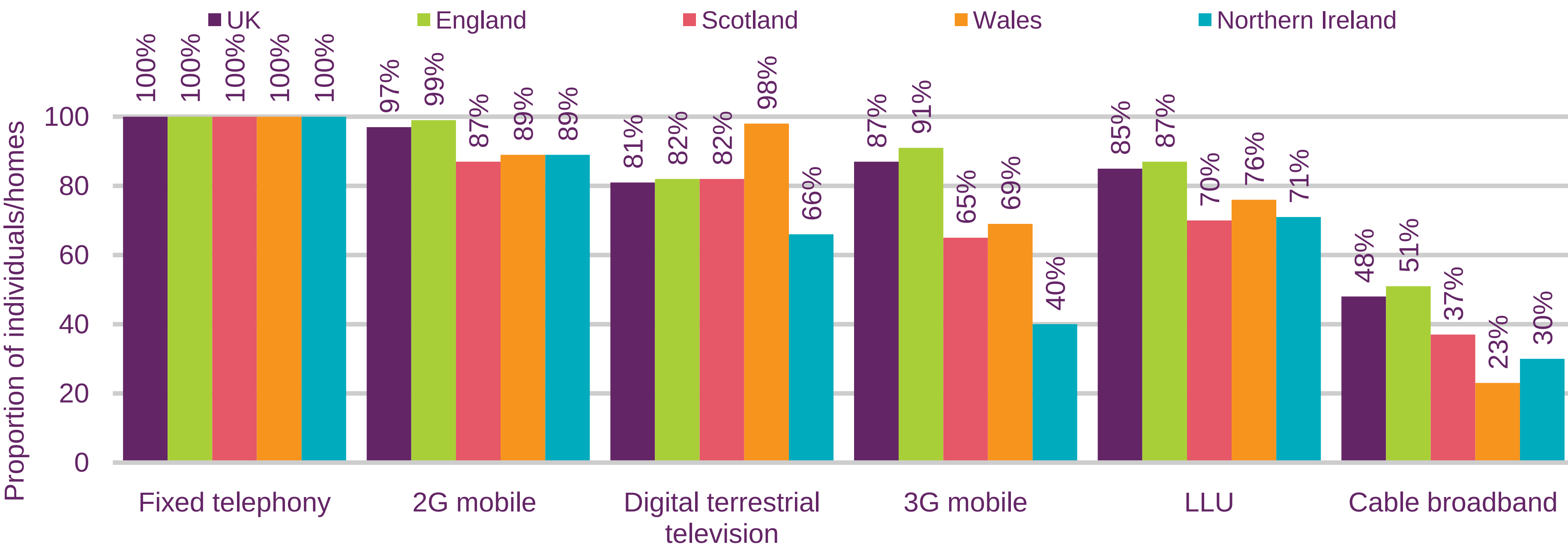
Figure 1.2

Communications infrastructure availability across the UK's nations, 2010

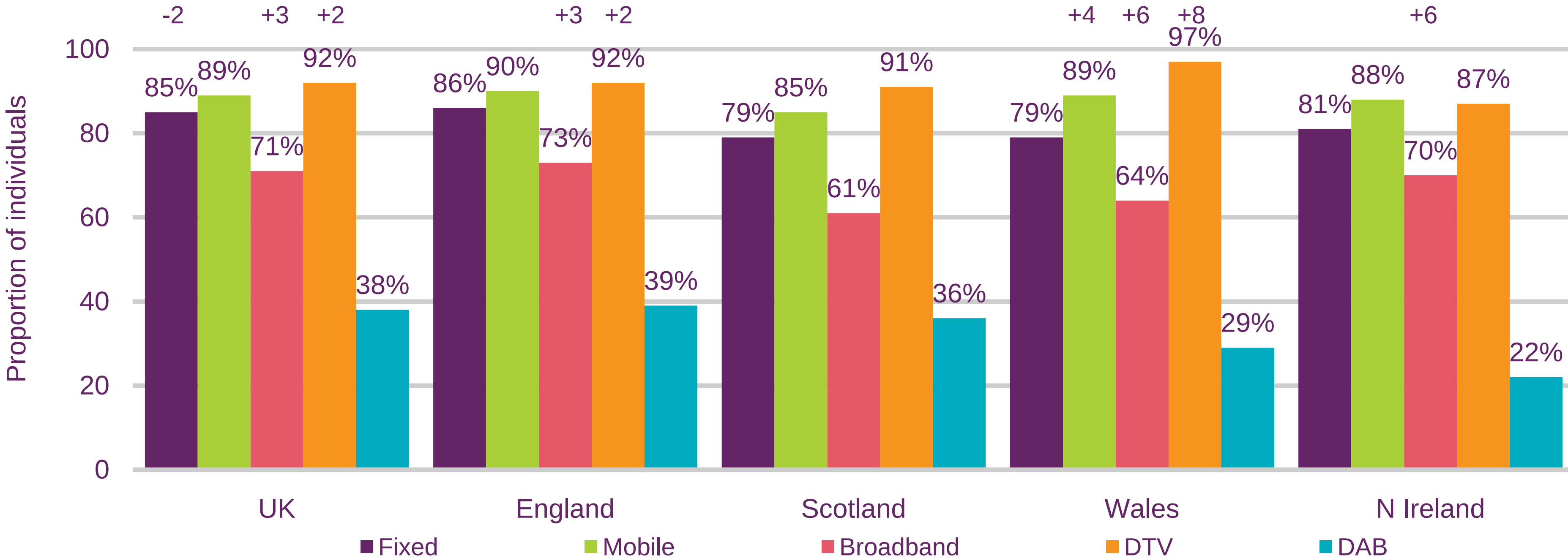


Sources: Ofcom and:

1. Proportion of population living in postal districts where at least one operator reports at least 90% 2G area coverage. Sourced from GSM Association / Europa Technologies (Q1 2008). Note we have raised this threshold from 75% in 2008; as a result we do not have time series data. Note that coverage data has been restated; this means that year-on-year comparisons are not possible.
2. Proportion of population living in postal districts where at least one operator reports at least 90% 3G area coverage. Sourced from GSM Association / Europa Technologies (Q1 2008). Note we have raised this threshold from 75% in 2008; as a result we do not have time series data. Note that coverage data has been restated; this means that year-on-year comparisons are not possible.
3. Proportion of premises able to receive DSL services based on data reported by BT
4. Proportion of households passed by Virgin Media's broadband-enabled network
5. Proportion of households connected to an LLU-enabled exchange
6. Availability of 17 services. Ofcom estimates.
7. DAB digital radio coverage figure based on a Digital One estimate.

Figure 1.3

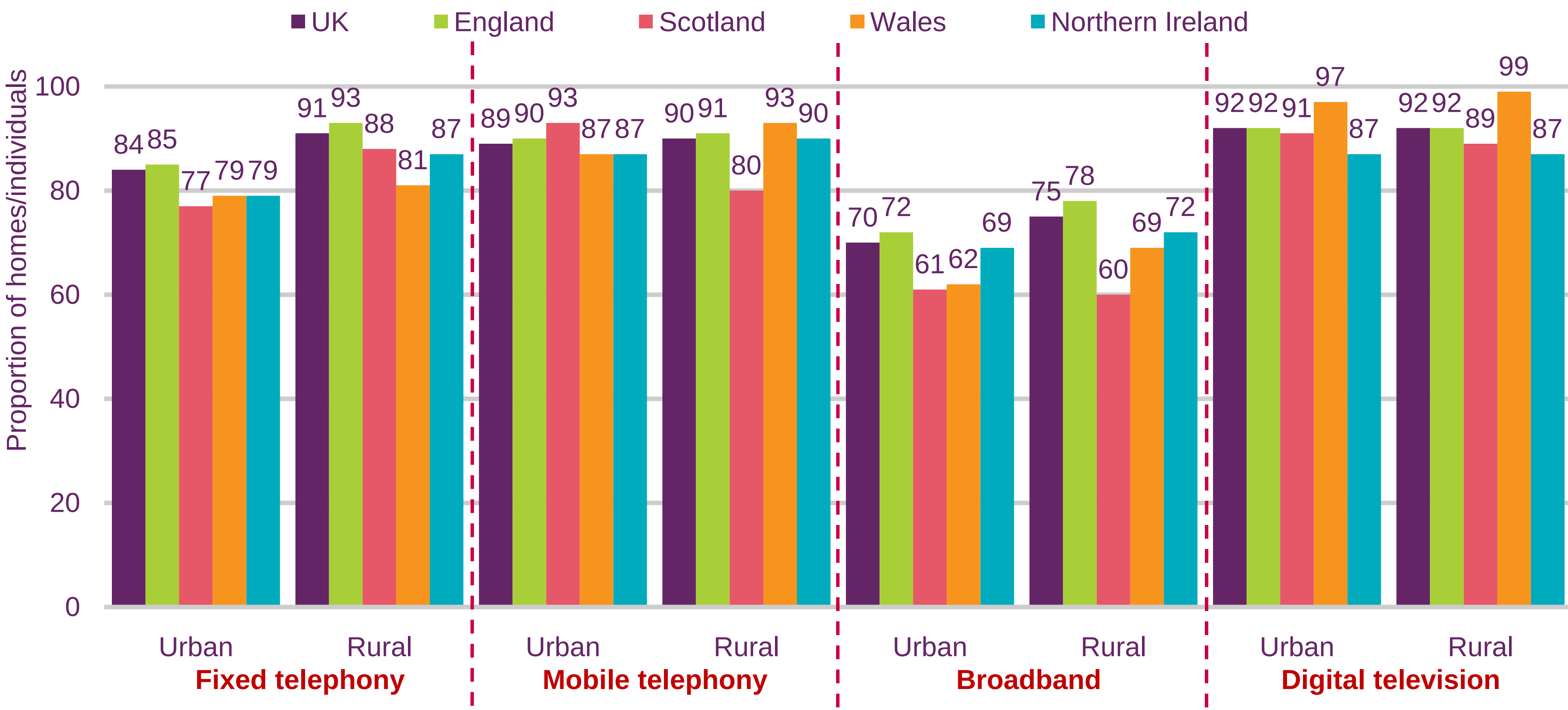
Patterns communications service adoption across the nations, 2010



Source: Ofcom research, Quarter 1 2009
Note: The DTV and DAB figures illustrated in this chart differ from those in the 'Fast Facts', because the bases used in this chart are, respectively, all of those with television at home and all of those who listen to radio.
Fixed line base: All adults aged 15+ (n = 6090 UK, 3437 England, 1014 Scotland, 987 Wales, 652 Northern Ireland)
Fixed line question: Is there a landline phone in your home that can be used to make and receive calls?
DTV base: Adults aged 15+ with a TV in the household (n= 6001 UK, 3389 England, 1002 Scotland, 970 Wales, 640 Northern Ireland)
DTV question. Which, if any, of these types of television does your household use at the moment?
Broadband base: All adults aged 15+ (n = 6090 UK, 3437 England, 1014 Scotland, 987 Wales, 652 Northern Ireland)
Broadband question: Which of these methods does your household use to connect to the internet at home?
DAB base: Adults aged 15+ who listen to radio (n= 5016 UK, 2819 England, 780 Scotland, 848 Wales, 569 Northern Ireland)
DAB question: How many DAB sets do you have in your household? Response represents those with one or more sets.
Note: Remaining percentages are Don't know responsesf
Mobile base: All adults aged 15+ (n = 6090 UK, 3437 England, 1014 Scotland, 987 Wales, 652 Northern Ireland)
Mobile question: Do you personally use a mobile phone?

Figure 1.4

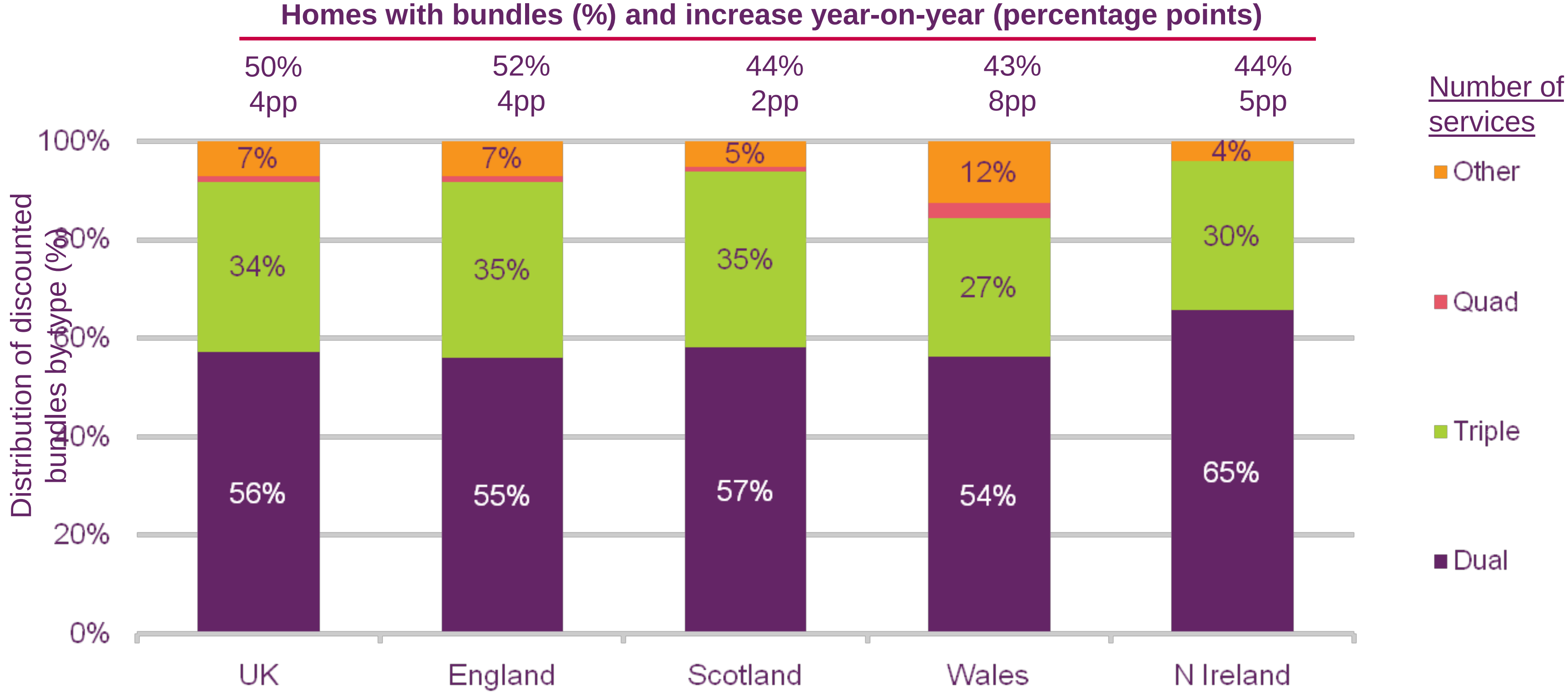
Communications service adoption across rural and urban locations, 2010



Source: Ofcom research; for questions see footnote under Figure 1.3.

Figure 1.5

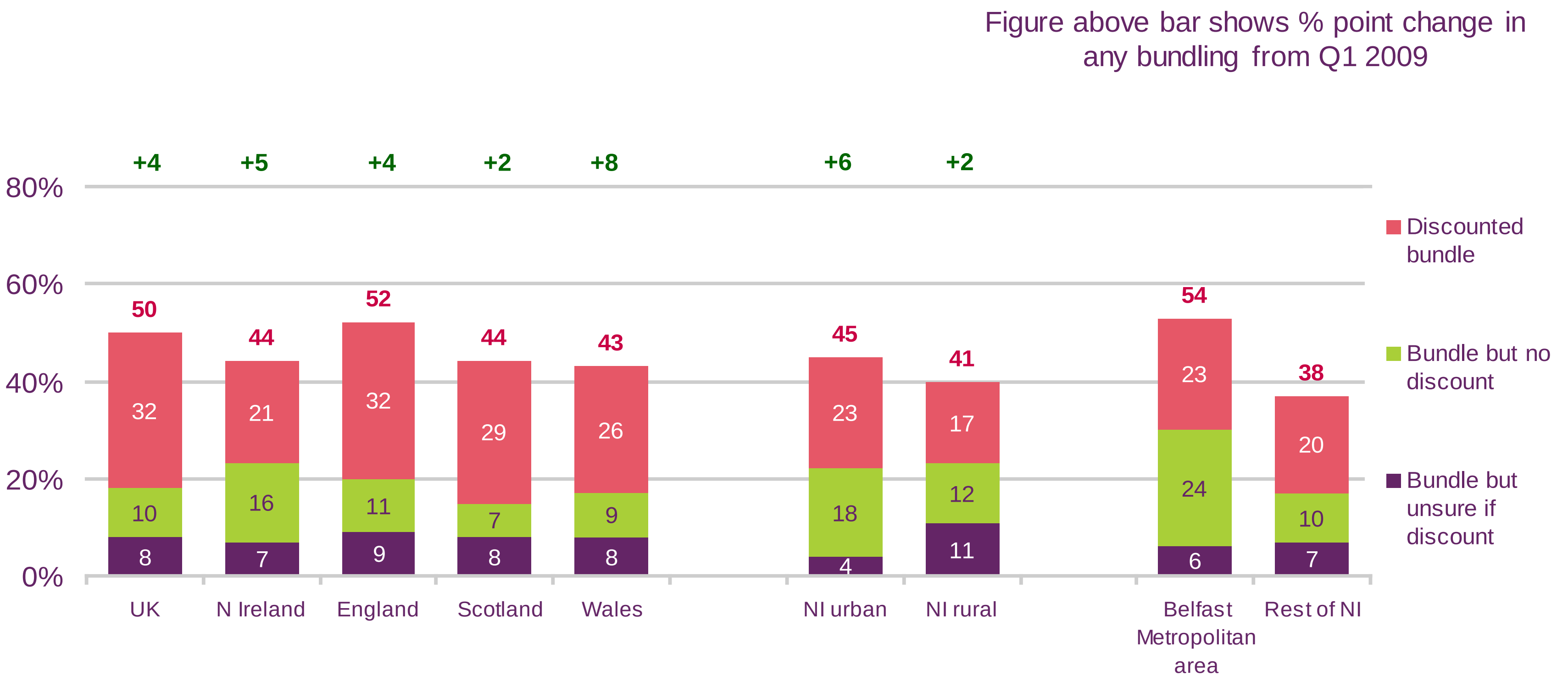
Take-up of bundles, by nation



Source: Ofcom research, Q1 2010
Base: All adults aged 15+ with a package of services regardless of whether or not these include a discount (n = 4167 UK, 2793 England, 605 Scotland, 437 Wales, 332 Northern Ireland)
Note: Remaining percentages are Don't know responses

Figure 1.6

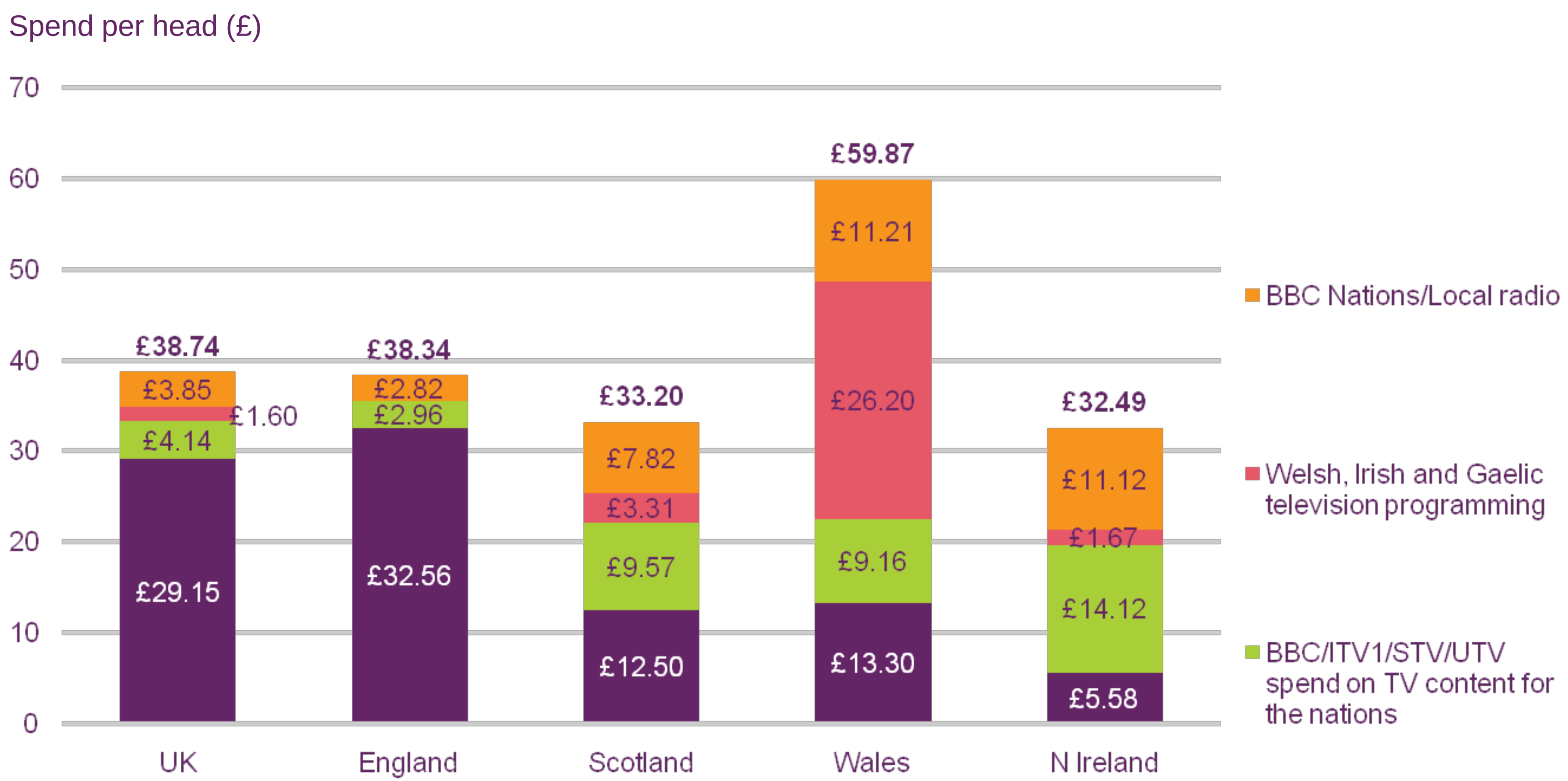
Proportion of customers buying bundled services, 2009-2010



Source: Ofcom research, Q1 2010
Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 501 Northern Ireland urban, 260 Northern Ireland rural, 349 Belfast Metropolitan area, 412 Rest of Northern Ireland)
Note: Figures above chart columns indicate total uptake of bundled service
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?

Figure 1.7

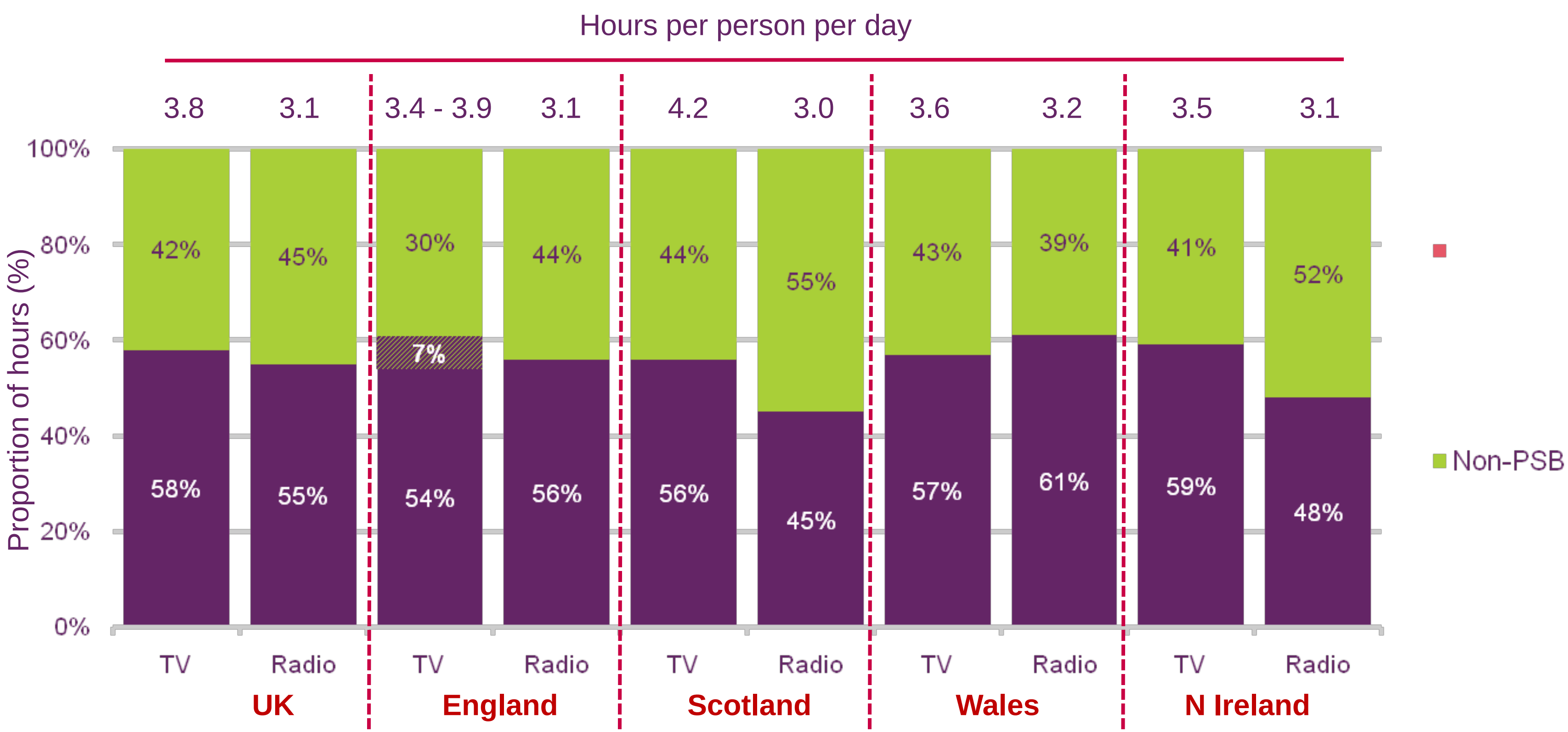
Spend per head on UK-originated content, 2010



Source: Operators, Annual Reports and Ofcom calculations

Figure 1.8

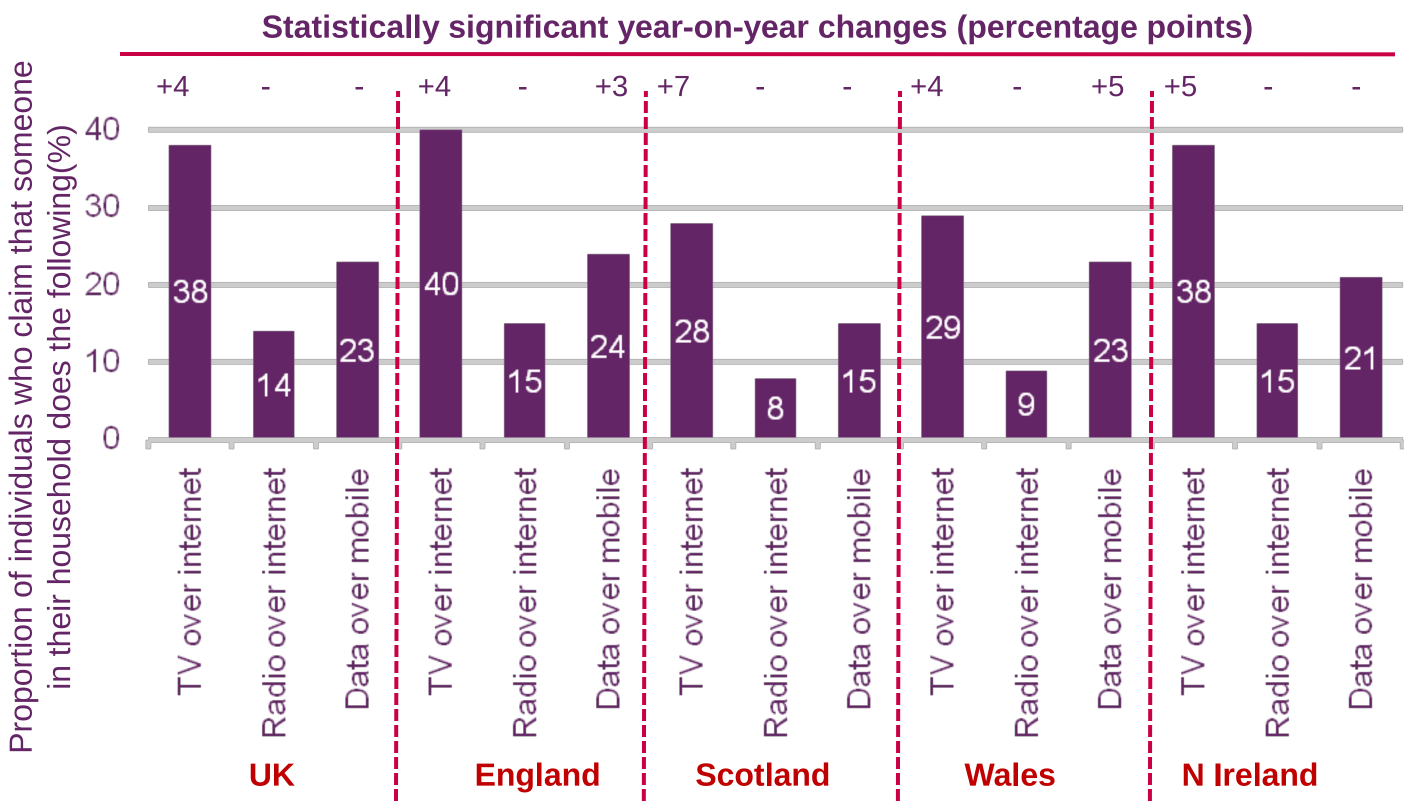
Hours of daily TV and radio use, by nation, 2010



Source: BARB and RAJAR

Figure 1.9

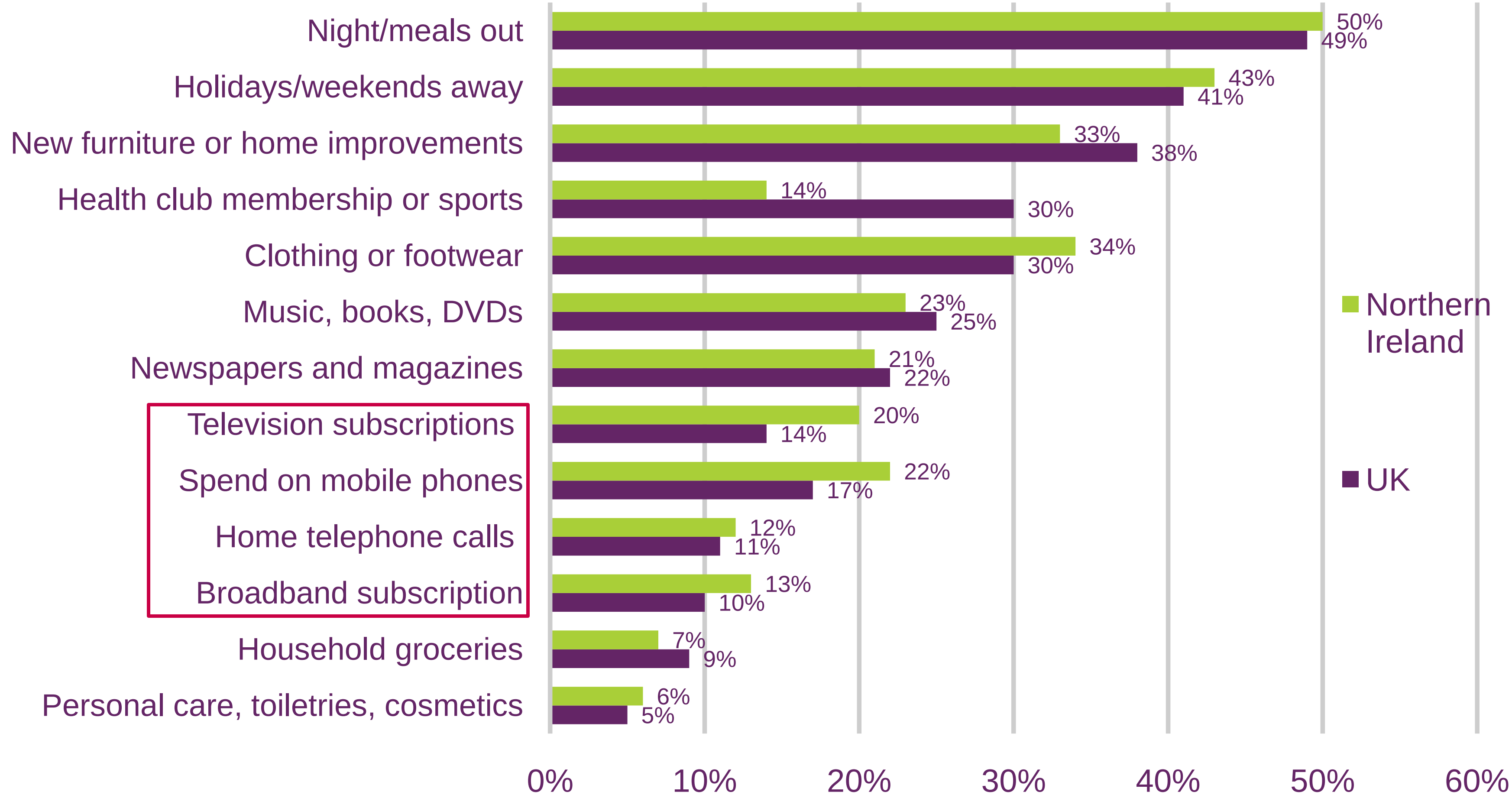
Consumers' use of converging platforms, 2010



Source: Ofcom research, Quarter 1 2010
Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland)
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?
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 1.10

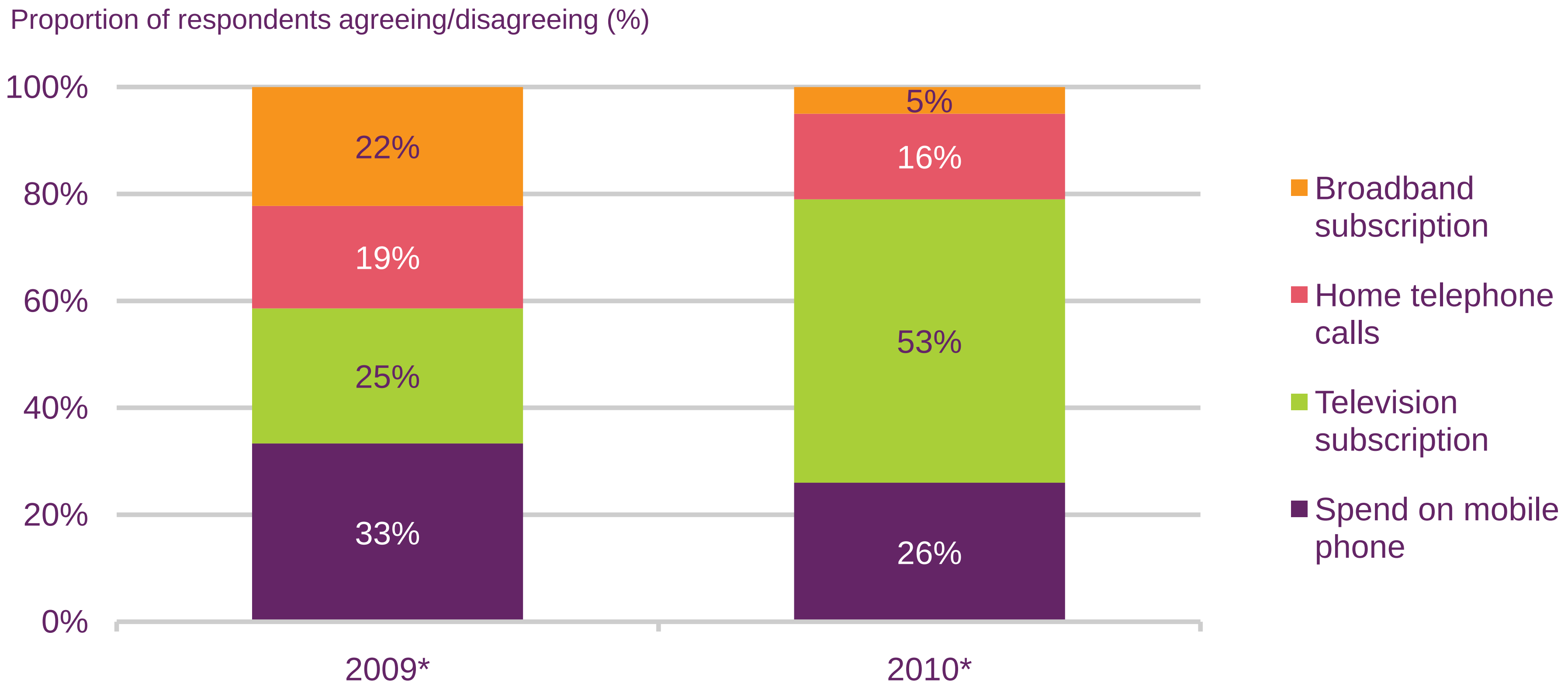
Items where consumers are most likely to cut back their spending



Source: Ofcom commissioned research
Base: Total Sample (n=2444), Northern Ireland (n=229)
Question: If you were forced to cut back on spending, which of the following items would you be most likely to spend less on?

Figure 1.11

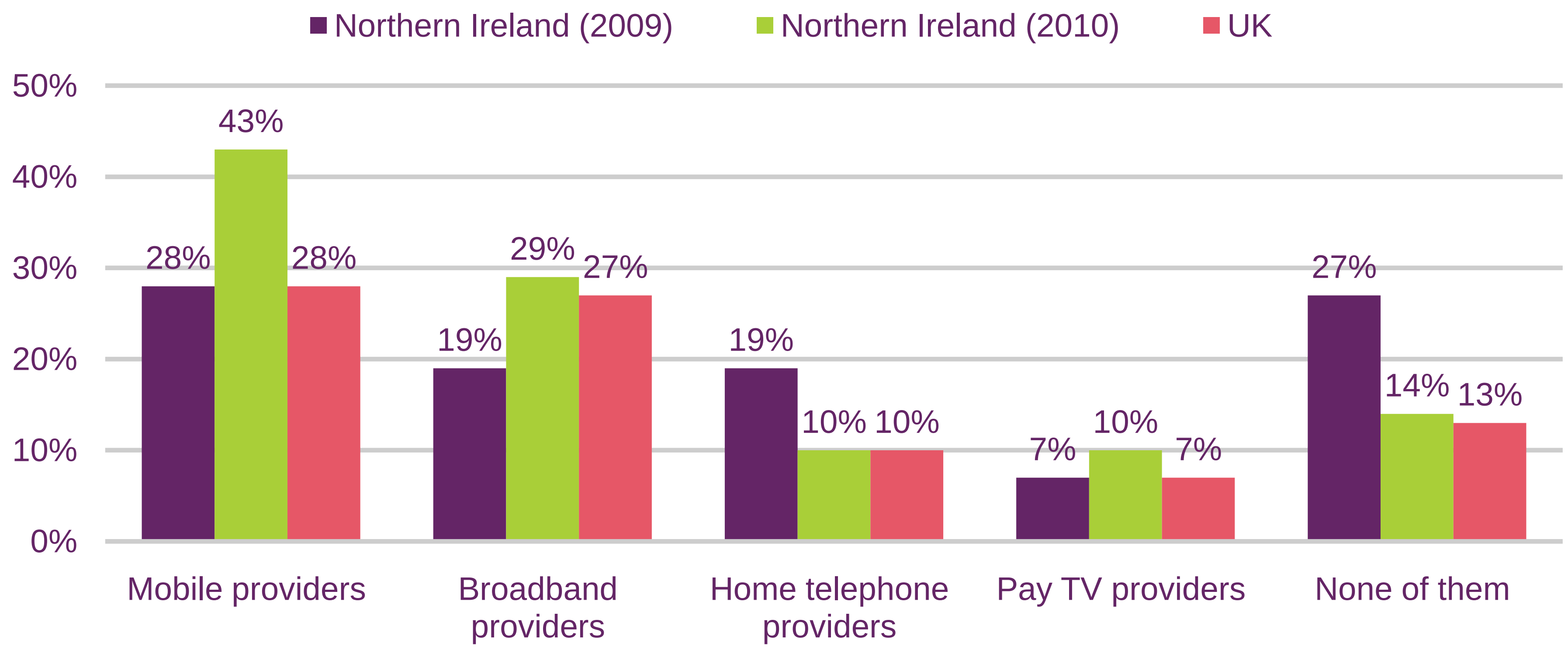
The communications service where consumers would be most likely to cut spend



Source: Ofcom-commissioned research
Base: Those with all four communications services 2009 (n=63) 2010 (n=70) *Note small base: results should be taken as indicative only.
Question: Which ONE of the following would you be most likely to cut back spending on?

Figure 1.12

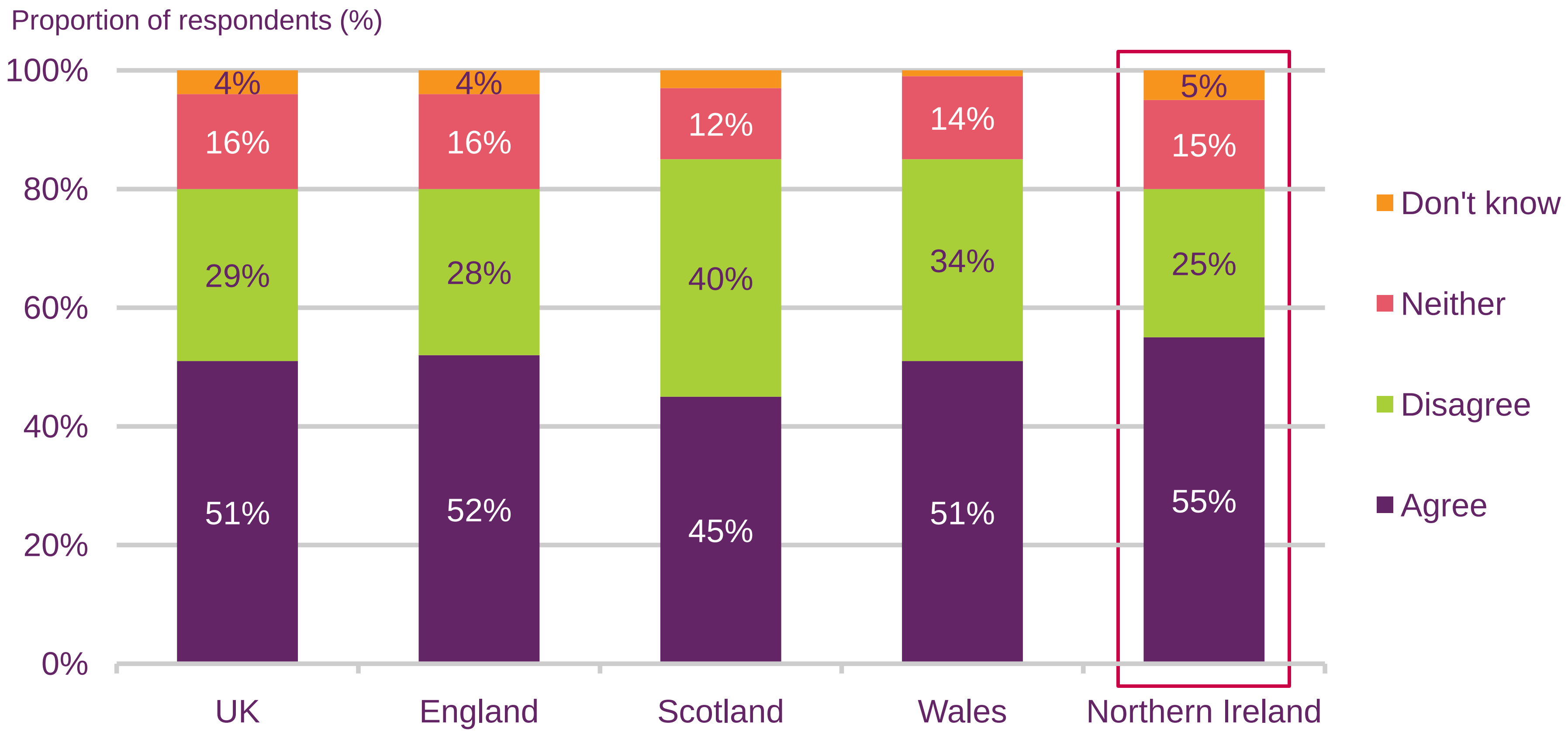
Proportion of consumers in Northern Ireland agreeing that communications providers offer better deals now than a year ago



Source Ofcom commissioned research
Base: Total sample UK (n=2444), Northern Ireland (2009 n=185, 2010 n=229)
Question: And which of the following providers, if any are offering better deals than they were 12 months ago?

Figure 1.13

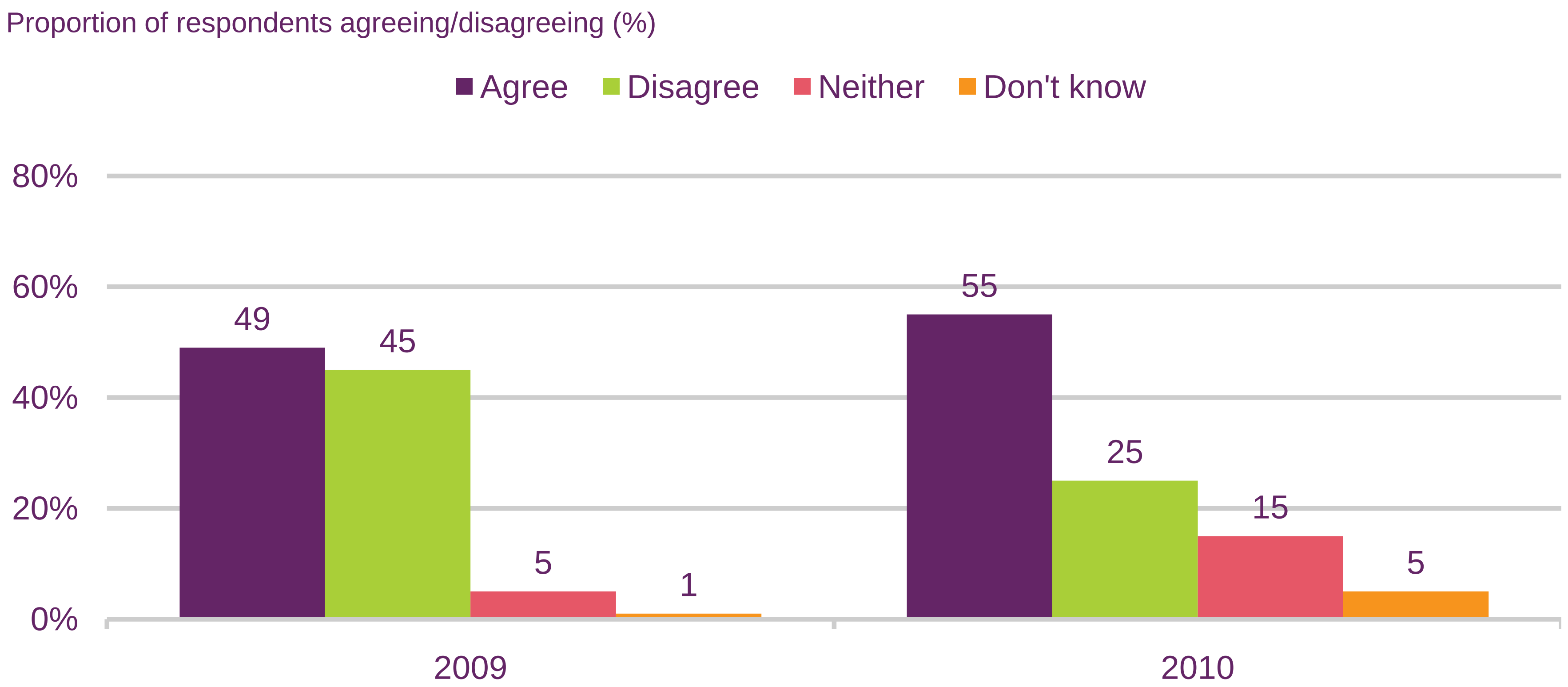
Consumers' agreement/disagreement that they were more likely to take communications services in a bundle by nation



Source: Ofcom-commissioned research
Base: Total sample (n = 2444) England (n = 1727) Scotland (n =285) Wales (n = 203) Northern Ireland (n = 229)
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.14

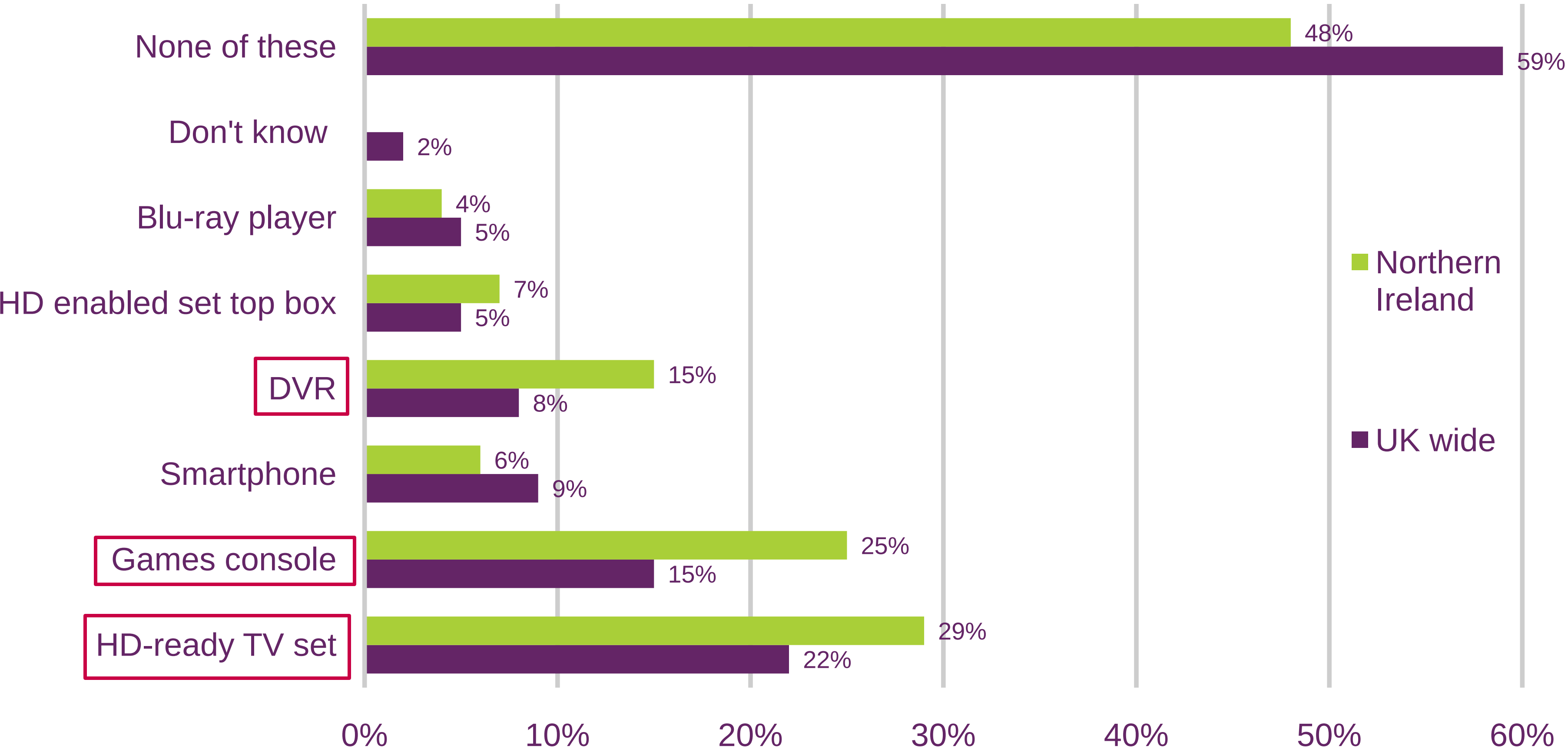
Consumers' agreement/disagreement that they were more likely to take communications services in a bundle



Source: Ofcom-commissioned research
Base: Total sample (n = 229)
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.15

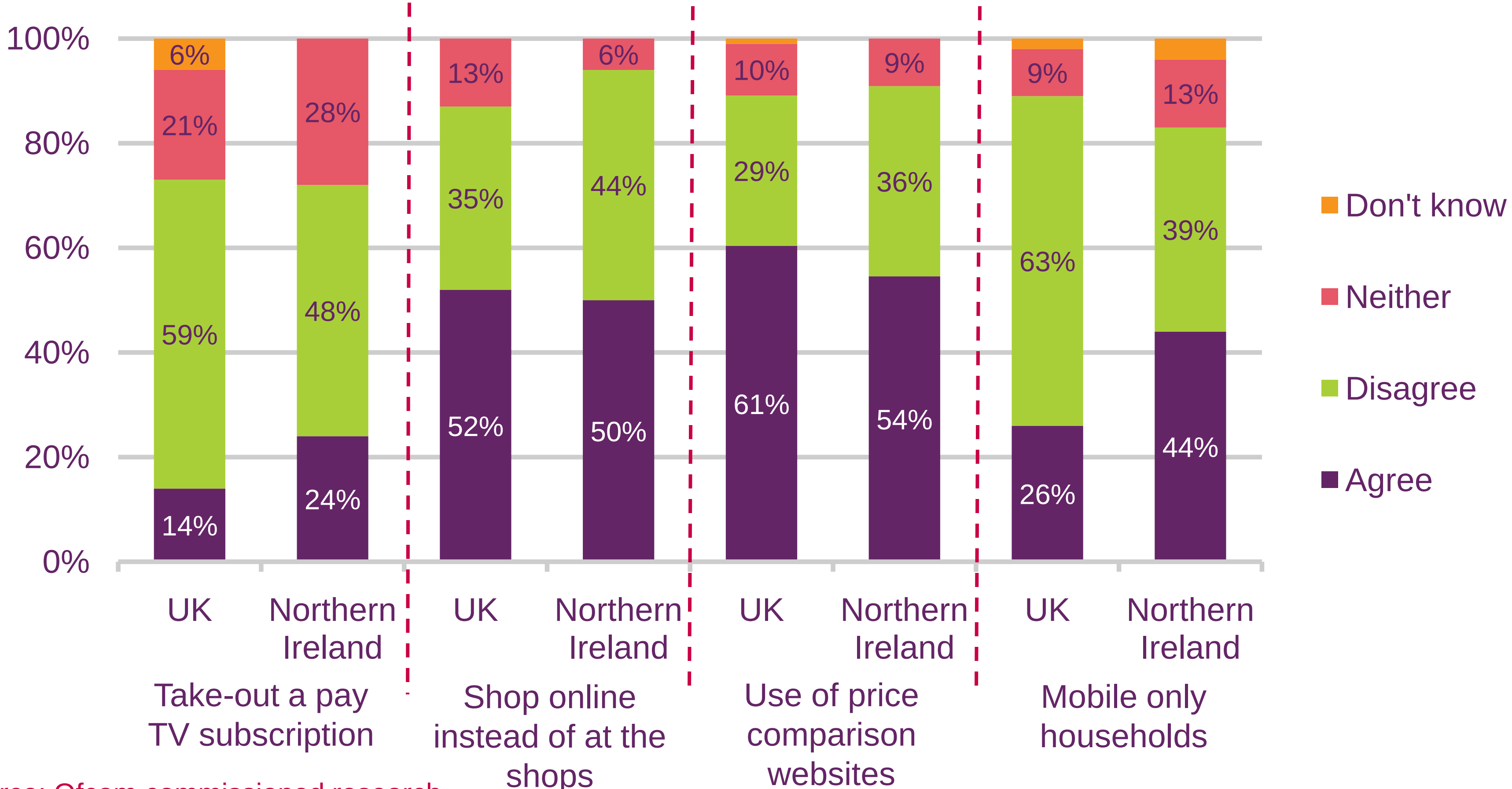
Selected communication devices bought in the last 12 months



Source: Ofcom commissioned research
Base: Total sample (UK n=2444, Northern Ireland n=229)
Question: Which, if any, of these products or services have you or your household bought in the last 12 months?

Figure 1.16

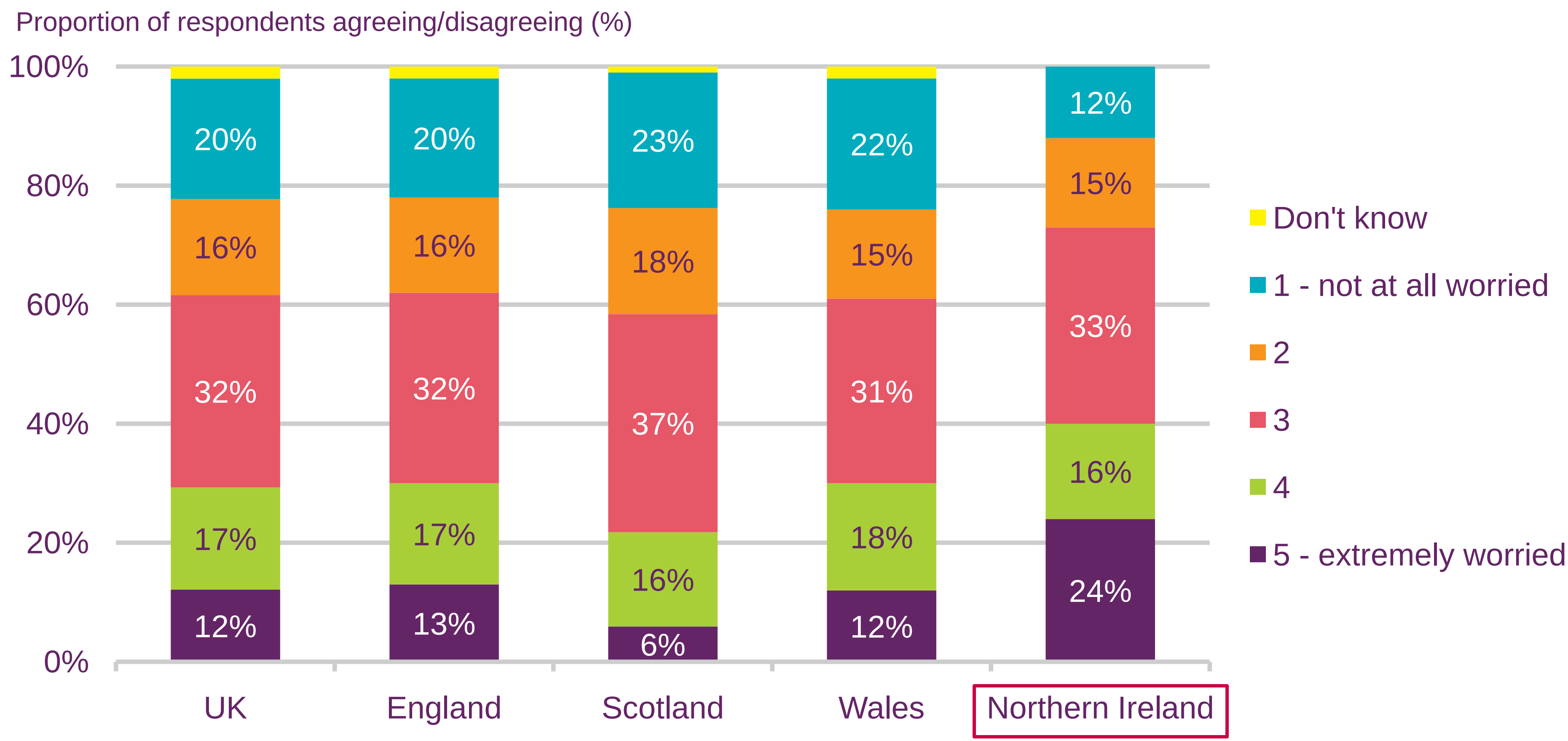
Consumers’ agreement/disagreement with a range of statements exploring changes in behaviour over the last twelve months



Source: Ofcom commissioned research
Base: UK n=(1300, 1554, 1554, 2099) Northern Ireland n=(108,122,122,203)
Question: I am now going to read out a number of statements other people have made about how the recession has changed their spending on TV, broadband, mobile and home phone services. For each statement please tell me how much you agree or disagree.

Figure 1.17

Consumer attitudes towards the recession by nation



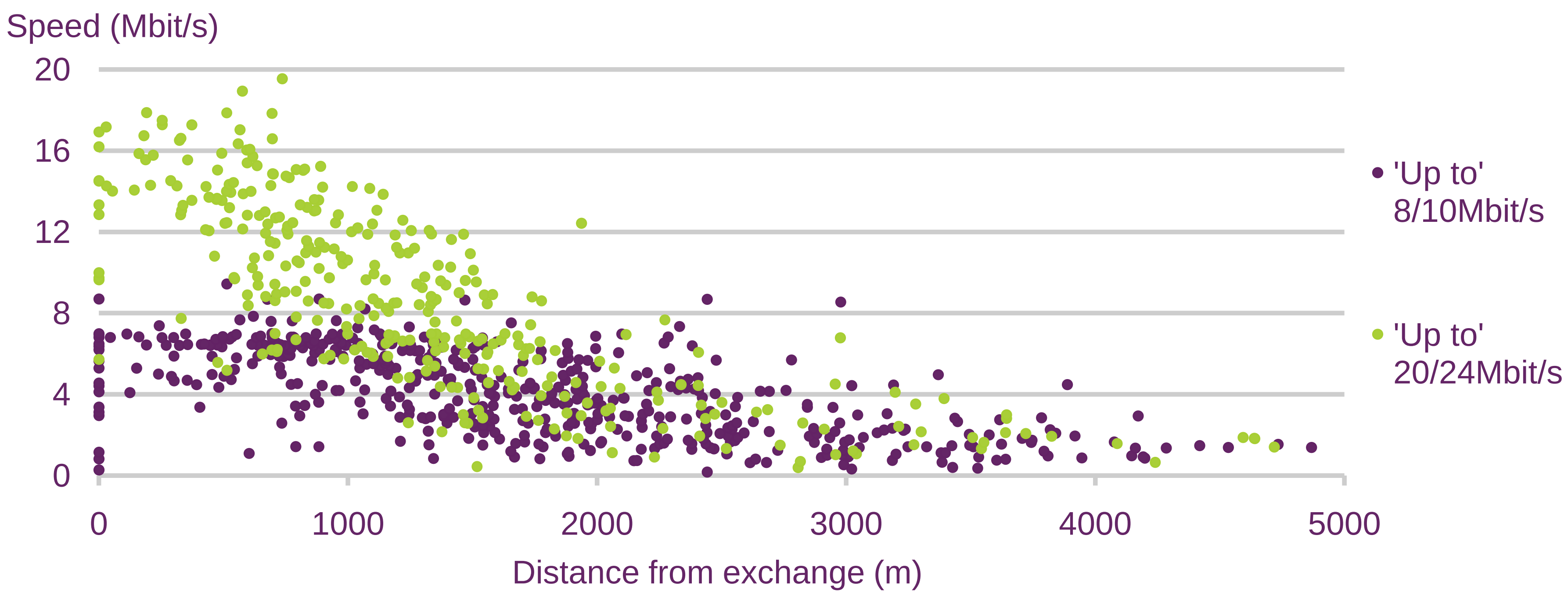
Source: Ofcom commissioned research

Base: Total sample (n = 2444) England (n = 1727) Scotland (n =285) Wales (n = 203) Northern Ireland (n = 229)

Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

Figure 1.19 Average line speed versus distance of customer premises from the telephone exchange, May 2010

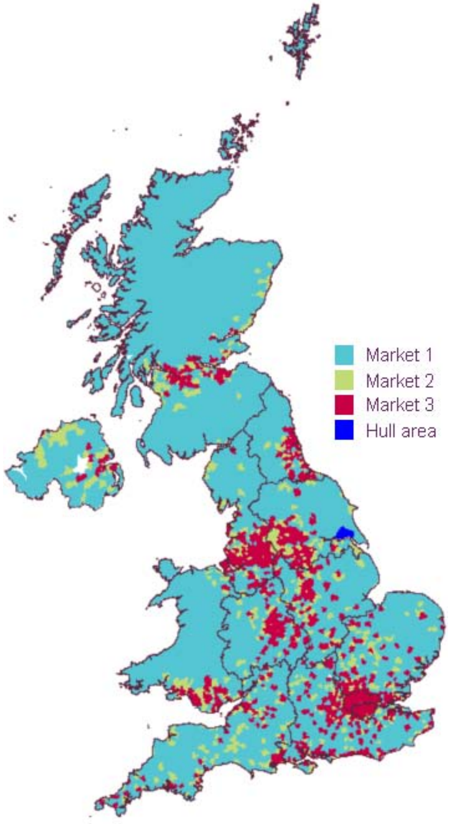
Distance from exchange and average download speeds achieved by panellists on 'up to' 8/10Mbit/s and 'up to' 20/24Mbit/s DSL packages, 4am to 5am multi thread test results, May 2010



Ofcom UK Broadband Speeds Report, July 2010.
Source: SamKnows measurement data for all panellists with a DSL connection in May 2010.

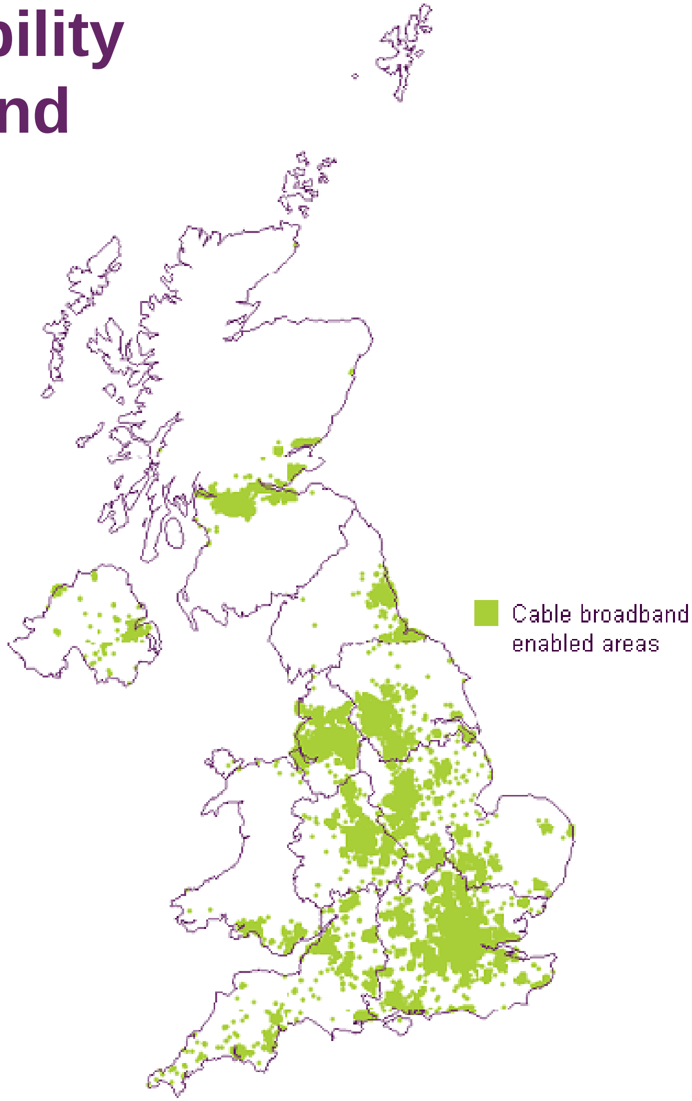
Figure 1.19: Distribution of UK exchanges by geographic market definition

Market	Description	Exchanges	Coverage
The Kingston upon Hull area	Those geographic areas covered by exchanges where Kingston Communications is the only operator	14	0.7%
Market 1	Those geographic areas covered by exchanges where BT is the only operator	3,578	14.2%
Market 2	Those geographic areas covered by exchanges where there are 2 or 3 Principal Operators present (actual or forecast) AND exchanges where there are forecast to be 4 or more Principal Operators but where the exchange serves less than 10,000 premises	722	13.8%
Market 3	Those geographic areas covered by exchanges where there are currently 4 or more Principal Operators present AND exchanges where there are forecast to be 4 or more Principal Operators but where the exchange serves 10,000 or more premises	1,287	71.3%



Source: Ofcom, Review of the wholesale broadband access markets: Consultation on market definition, market power determinations and remedies, July 2010, http://stakeholders.ofcom.org.uk/binaries/consultations/wba/summary/wbacondoc.pdf
Note: Principal operators are those that provide broadband services over their own access networks (BT or Virgin Media) or have deployed LLU in more than 10% of the UK

Figure 1.20: Map of the availability of Virgin Media cable broadband

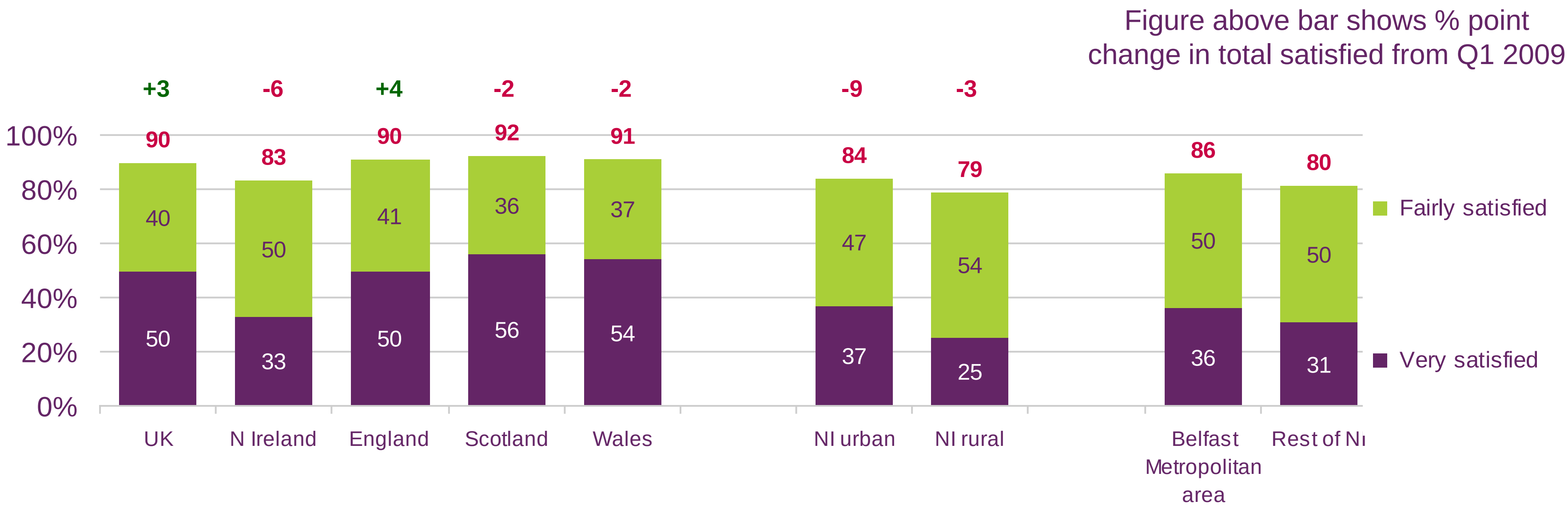


Source: Ofcom/Virgin Media, September 2008 data

Figure 1.21: Estimated average and maximum download speeds by UK nation, May 2010

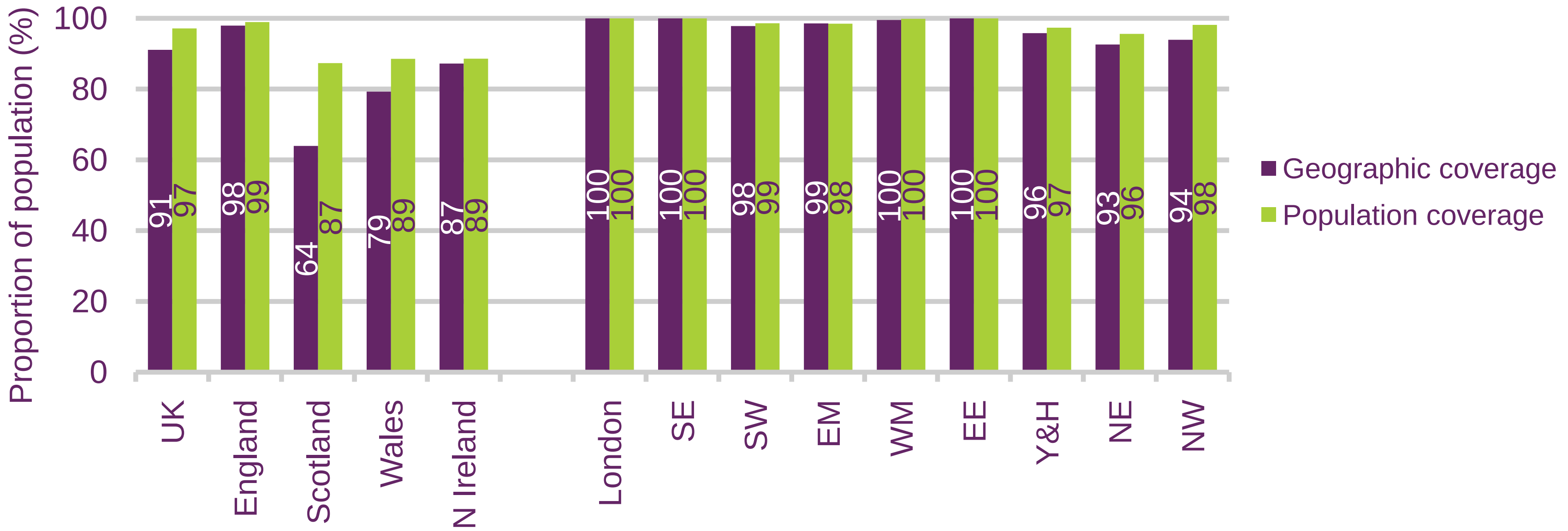
Ofcom UK Broadband speeds report, July 2010
Source: SamKnows measurement data for all panel members with a connection in May 2010,
Panel Base: 1506
Notes: (1) Data have been weighted by ISP package and LLU/non-LLU connections, Rural/Urban, Geographic Market classification and distance from exchange to ensure that they are representative of UK residential broadband consumers as a whole; (2) As sufficient sample sizes were not available for consumers on packages of 'up to' 2Mbit/s or less, data collected for these packages in April 2009 has been factored in, in proportion to share of all connections in May 2010 and an estimated split between nations; (3) Data collected from single-thread download speed tests

Figure 1.22: Overall satisfaction with fixed broadband service



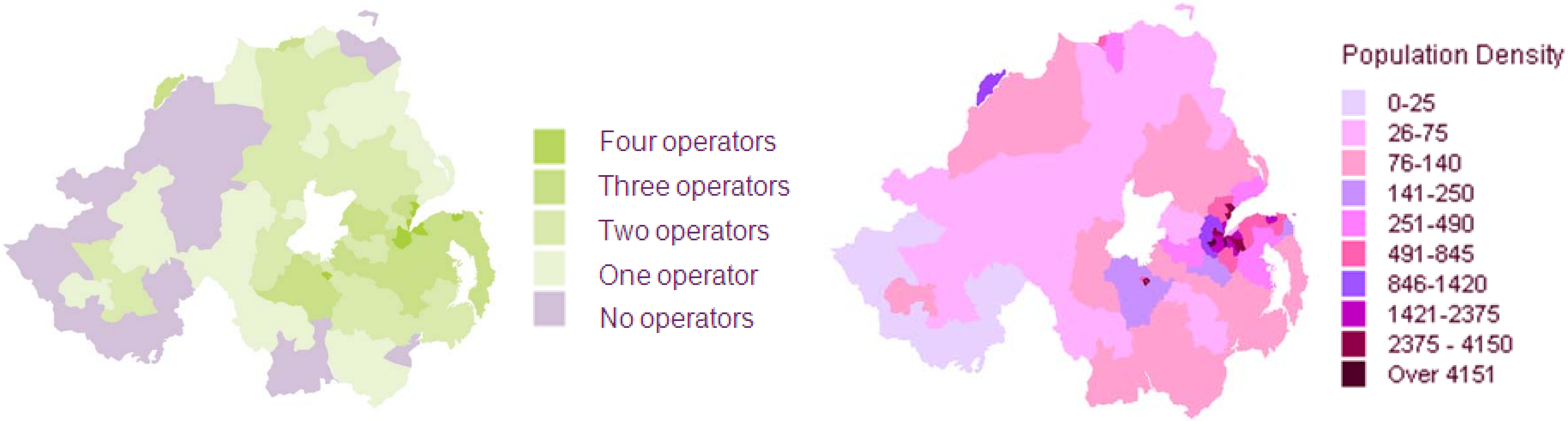
QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?
Source: Ofcom research, Quarter 1 2010
Base: Adults aged 15+ with a fixed broadband connection at home (n= 5410 UK, 469 Northern Ireland, 3559 England, 778 Scotland, 604 Wales, 297 Northern Ireland urban, 173 Northern Ireland rural, 230 Belfast Metropolitan area, 239 Rest of NI)
Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed broadband service

Figure 1.23: 2G mobile phone geographic and population coverage



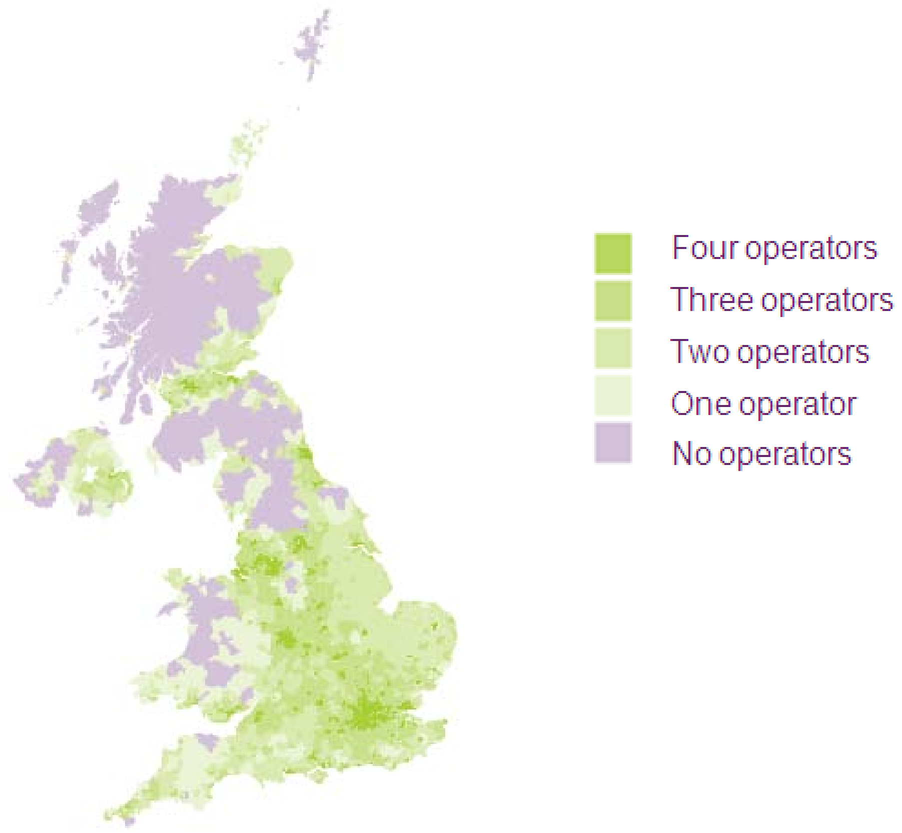
Source: Ofcom/ GSM Association / Europa Technologies; Q2 2010
Note: Figures show the percentage of postcode districts and percentage of population within postcode districts where at least one operator had at least 90% 2G area coverage; data not directly comparable to that published in the 2009 report.

Figure 1.24: 2G mobile coverage map and population density, by postal code district



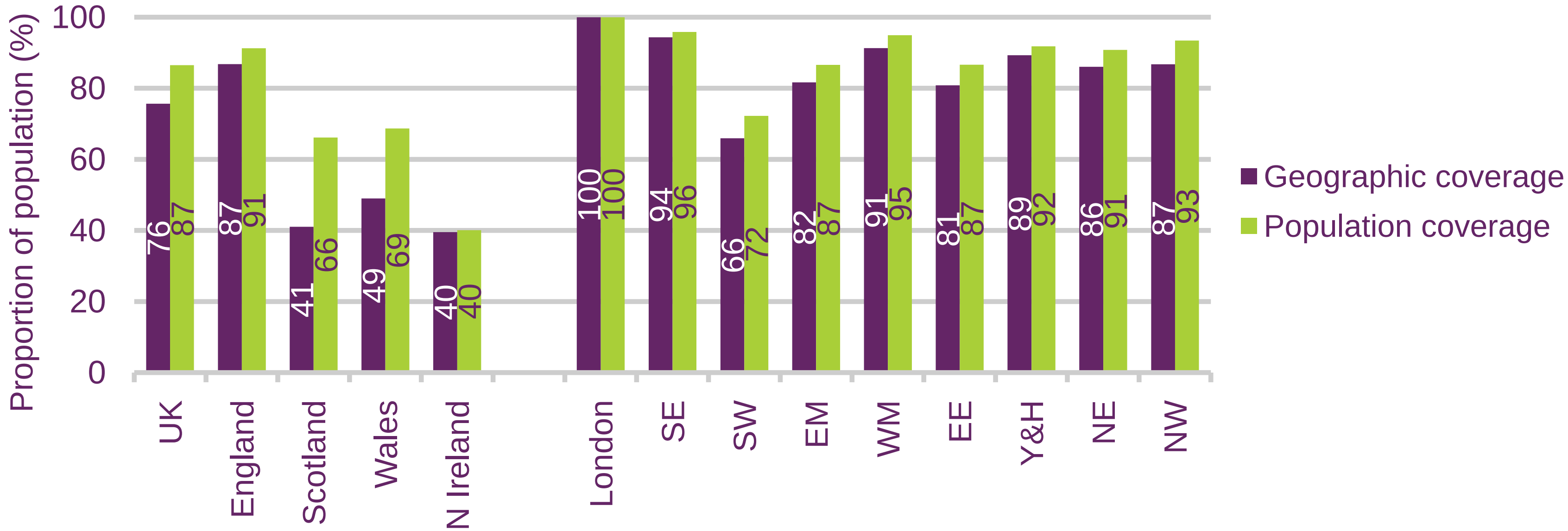
Source: Ofcom / GSM Association / Europa Technologies; Q2 2010
Note: Map shows the number of 2G operators with at least 90% area coverage; not directly comparable to that published in the 2009 report.

Figure 1.25: UK 2G mobile coverage map



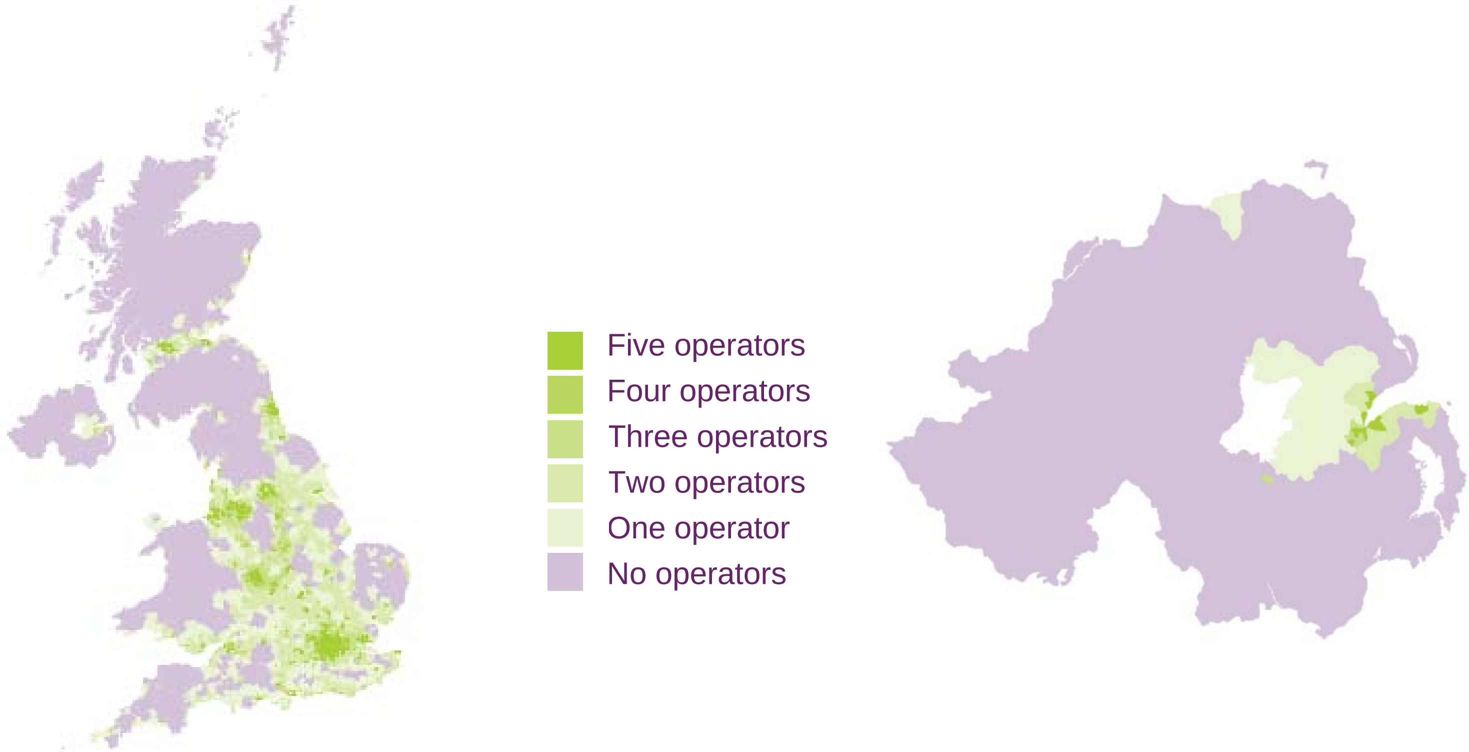
Source: Ofcom / GSM Association / Europa Technologies; Q2 2010
Note: Map shows the number of 2G operators with at least 90% area coverage; not directly comparable to that published in the 2009 report.

Figure 1.26: 3G mobile phone geographic and population coverage, by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2010
Note: Figures show the percentage of postcode districts and percentage of population within postcode districts where at least one operator had at least 90% 3G area coverage; data not directly comparable to that published in the 2009 report.

Figure 1.27: 3G coverage map

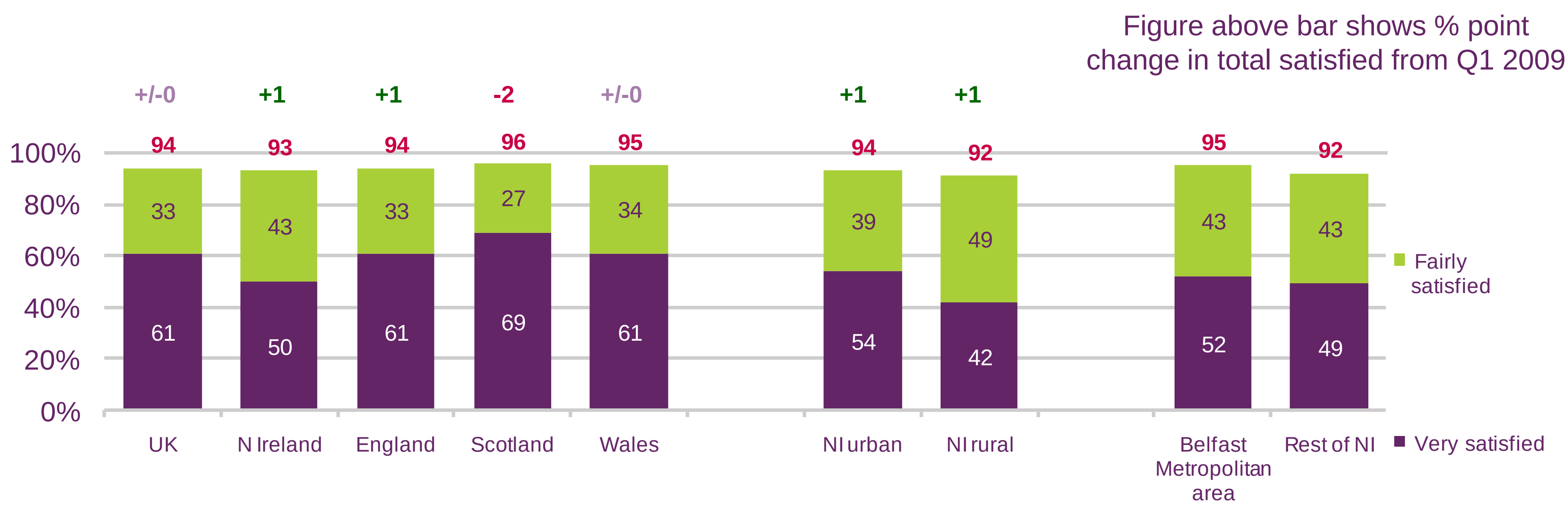


Source: Ofcom / GSM Association / Europa Technologies; Q2 2010
Note: Map shows the number of 3G operators with at least 90% area coverage; not directly comparable to that published in the 2009 report.

Figure 1.28: Proportion of UK adults with a mobile phone experiencing problems with coverage

Source: Mostly Mobile, Communications Consumer Panel report
Question: Which of the following problems, if any, have you had in the past in terms of your mobile reception…? Which of them, if any, do you experience regularly?
Base: All those who use a mobile for personal use (UK n = 1716, England n = 1439, Scotland n = 144, Wales n = 84, Northern Ireland n = 50.

Figure 1.29: 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 2010
Base: Adults aged 15+ who personally use a mobile phone (n = 7826 UK, 658 Northern Ireland, 5008 England, 1237 Scotland, 923 Wales, 428 Northern Ireland urban, 230 Northern Ireland rural, 298 Belfast Metropolitan area, 360 Rest of NI)
Note: Figures above chart columns indicate the proportion of people who were ‘very’ or ‘fairly’ satisfied with their overall mobile service