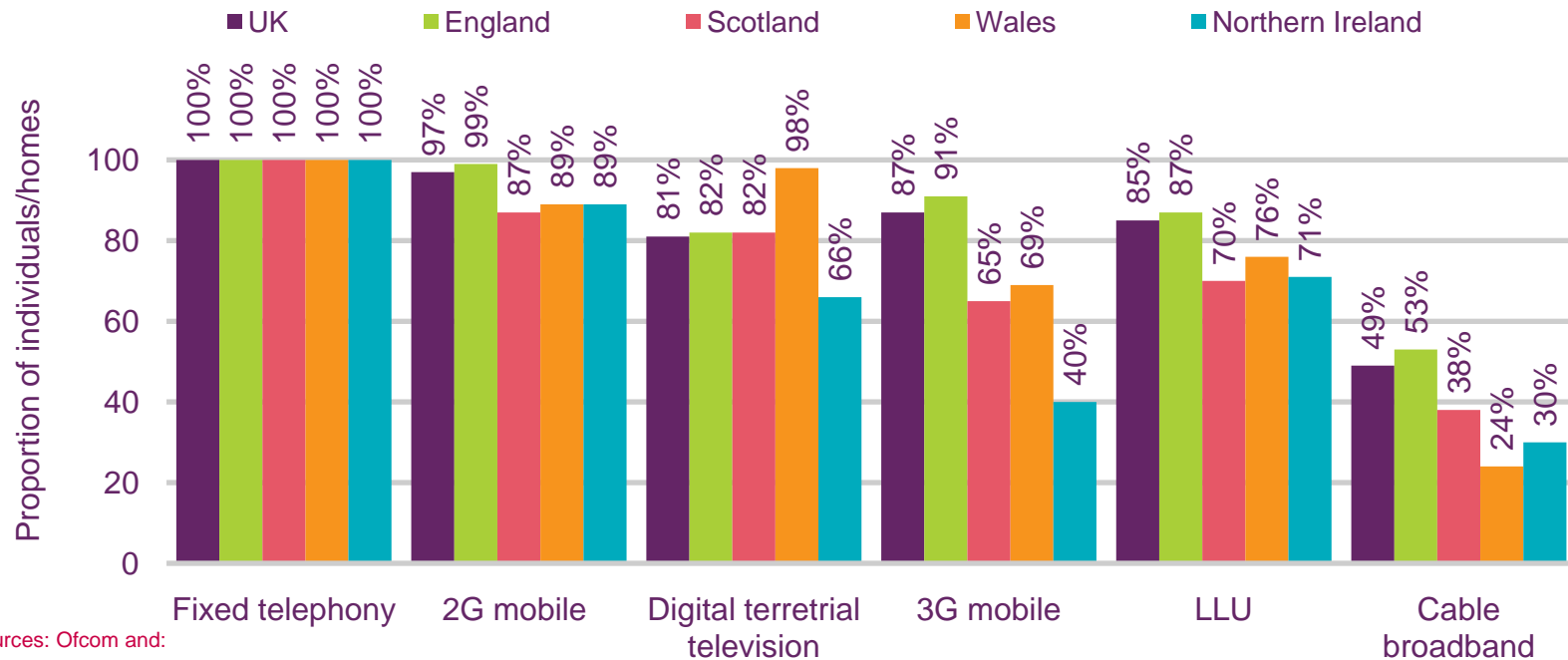


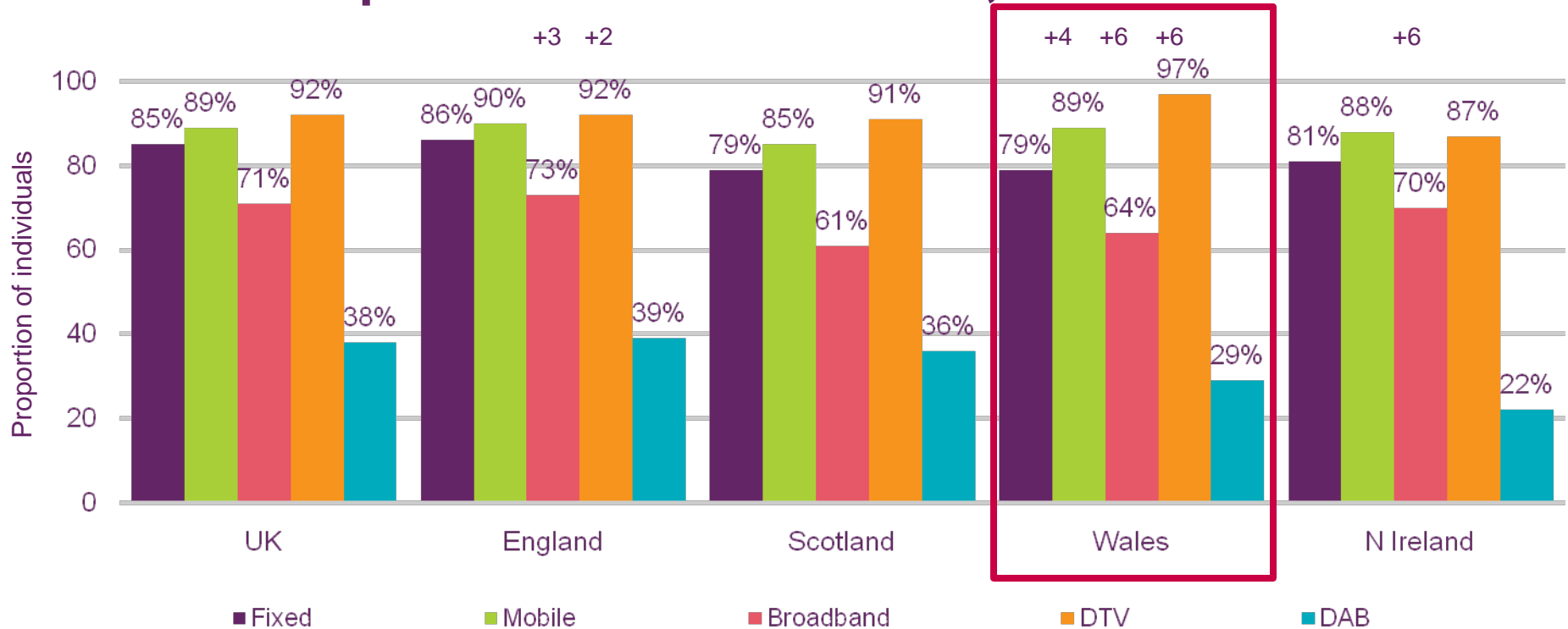
Figure 1.2: Communications infrastructure availability across the UK's nations, 2010



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)

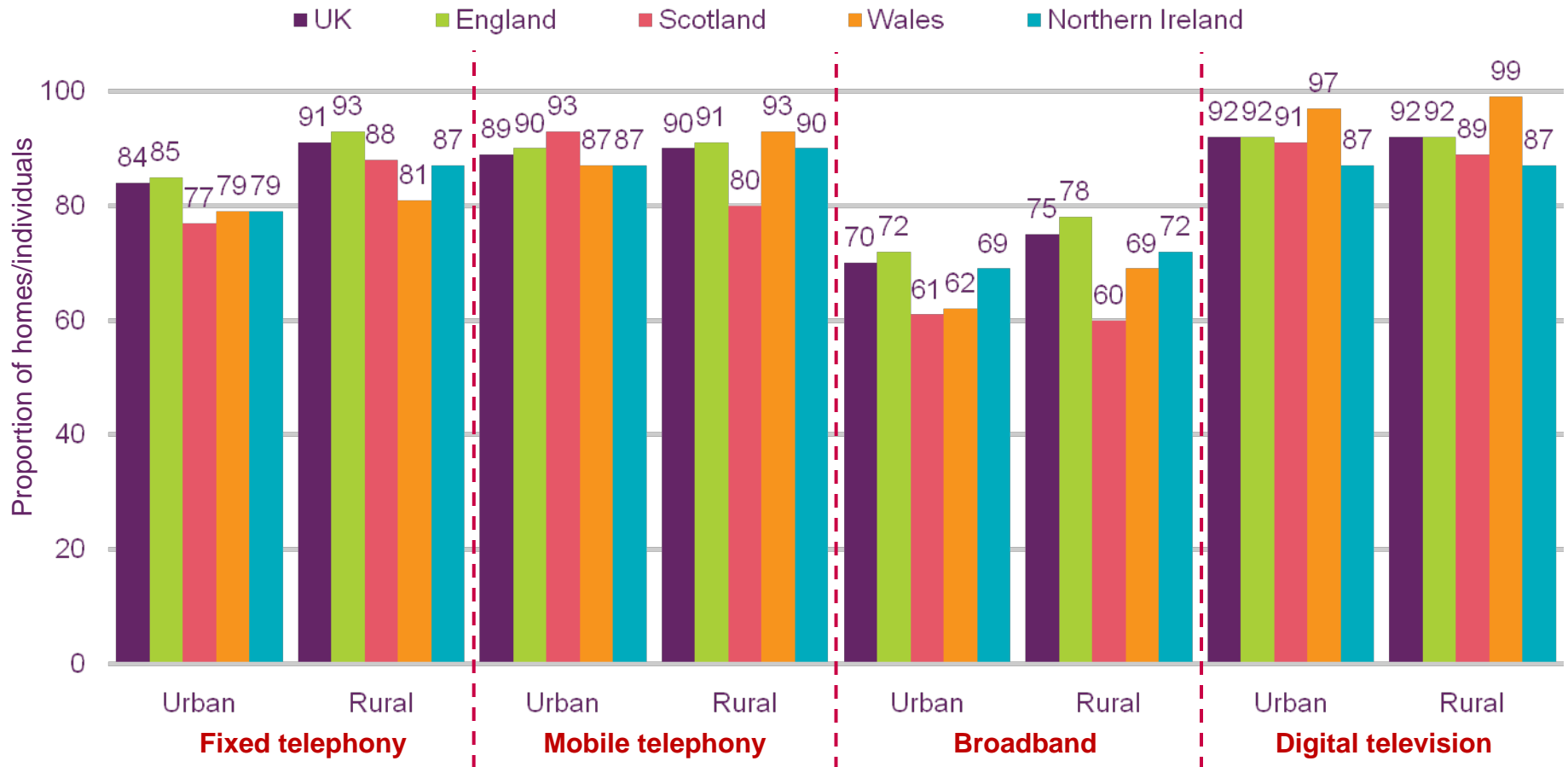
DAB question: How many DAB sets do you have in your household? Response represents those with one or more sets.

Note: Remaining percentages are Don't know responses

Mobile base: All adults aged 15+ (n = 6090 UK, 3437 England, 1014 Scotland, 987 Wales, 652 Northern Ireland)

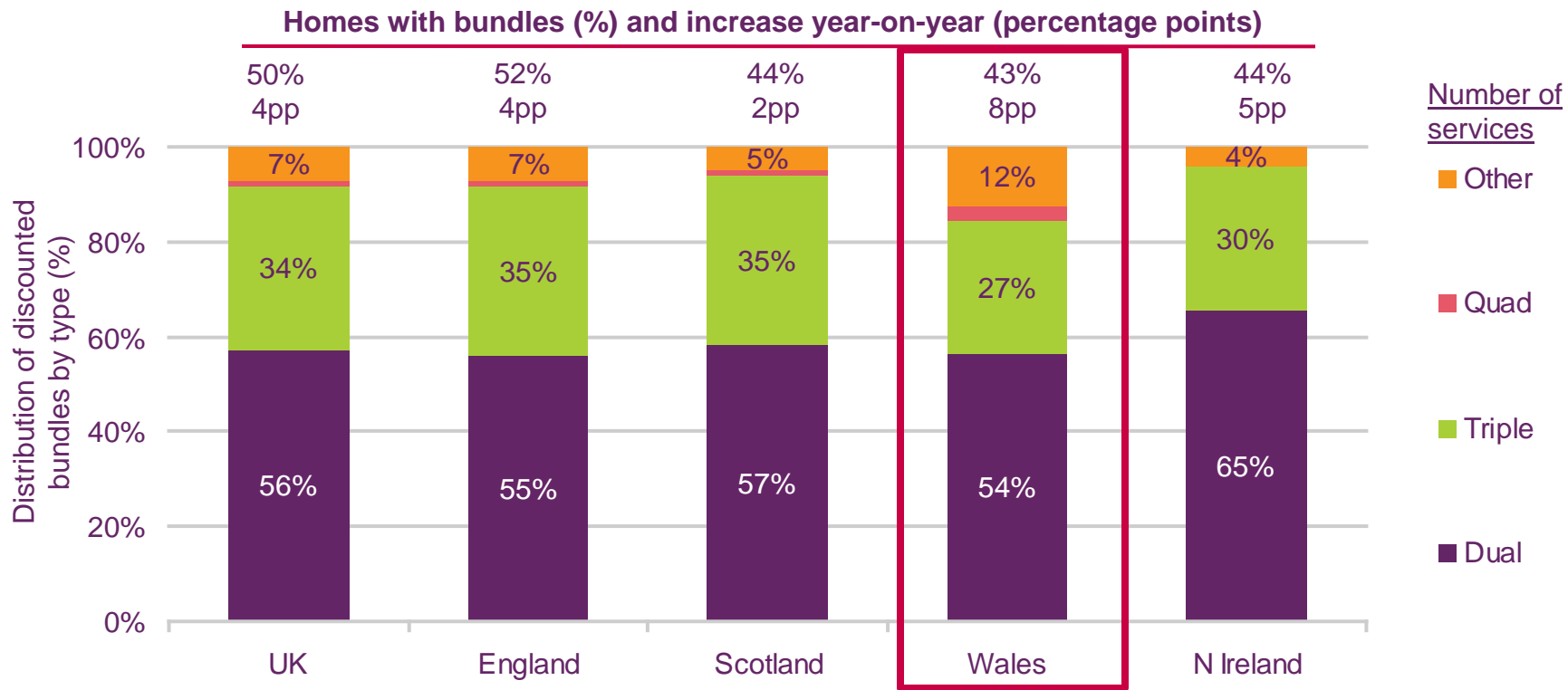
Mobile question: Do you personally use a mobile phone?

Figure 1.4: Adoption of communications services in rural and urban locations



xxxxxxxxxxxx

Figure 1.5: Take-up of bundles, by nation

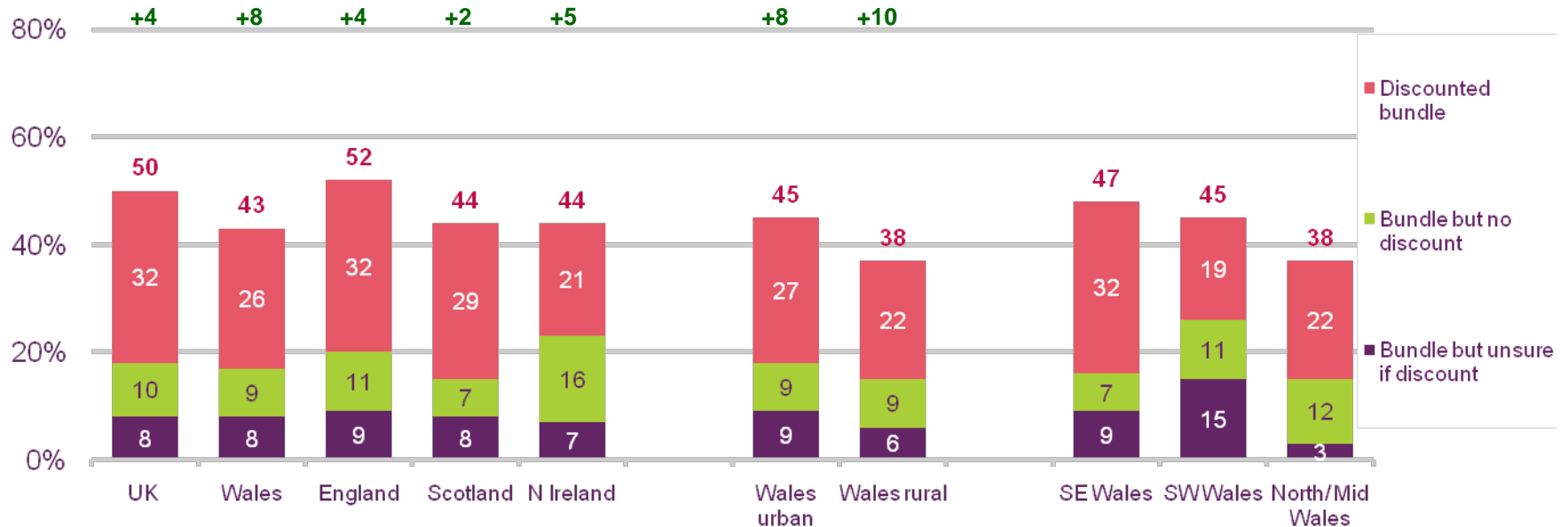


Source: Ofcom research, Q1 2010

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



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 2010

Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)

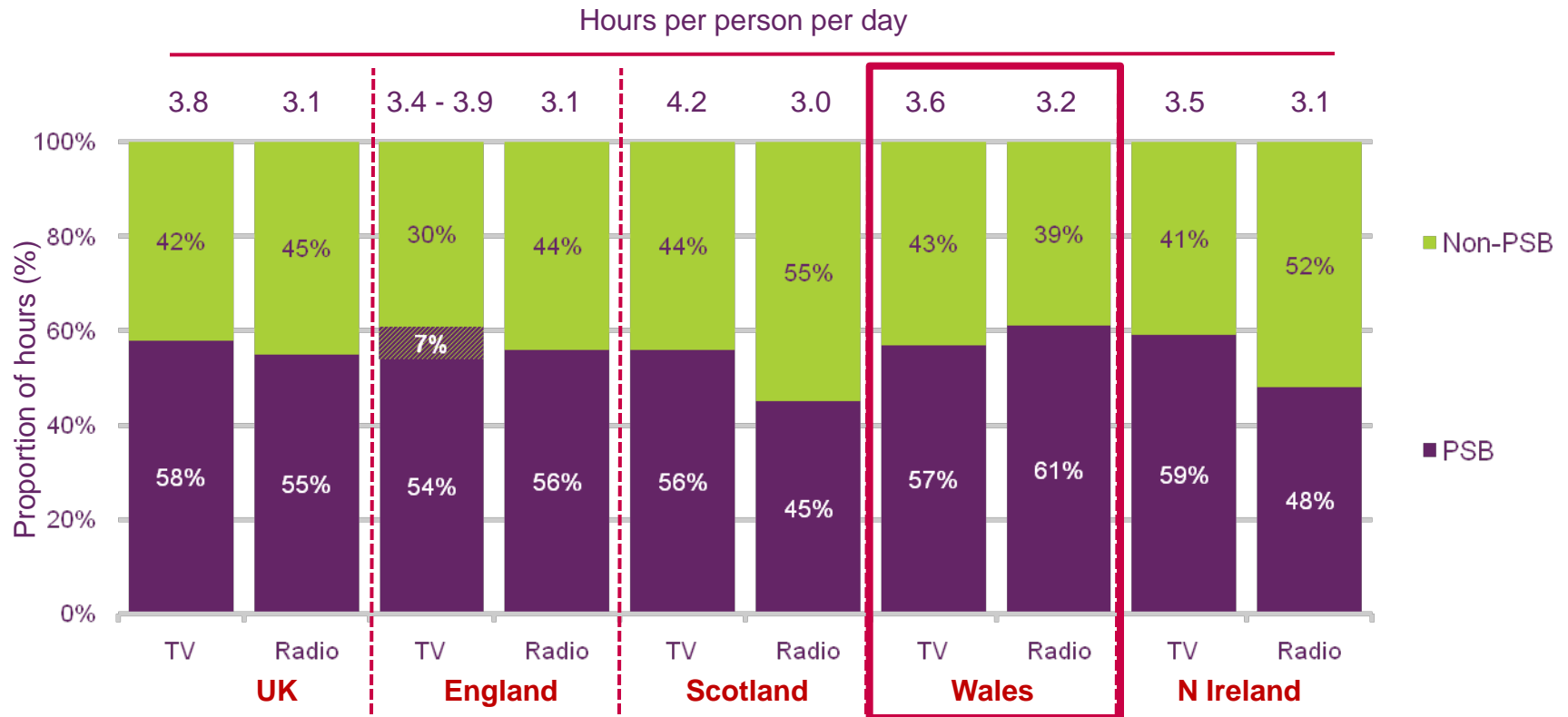
Note: Figures above chart columns indicate total uptake of bundled service

Figure 1.7: Spend per head on UK-originated content by broadcast by PSBs on TV and radio, 2010



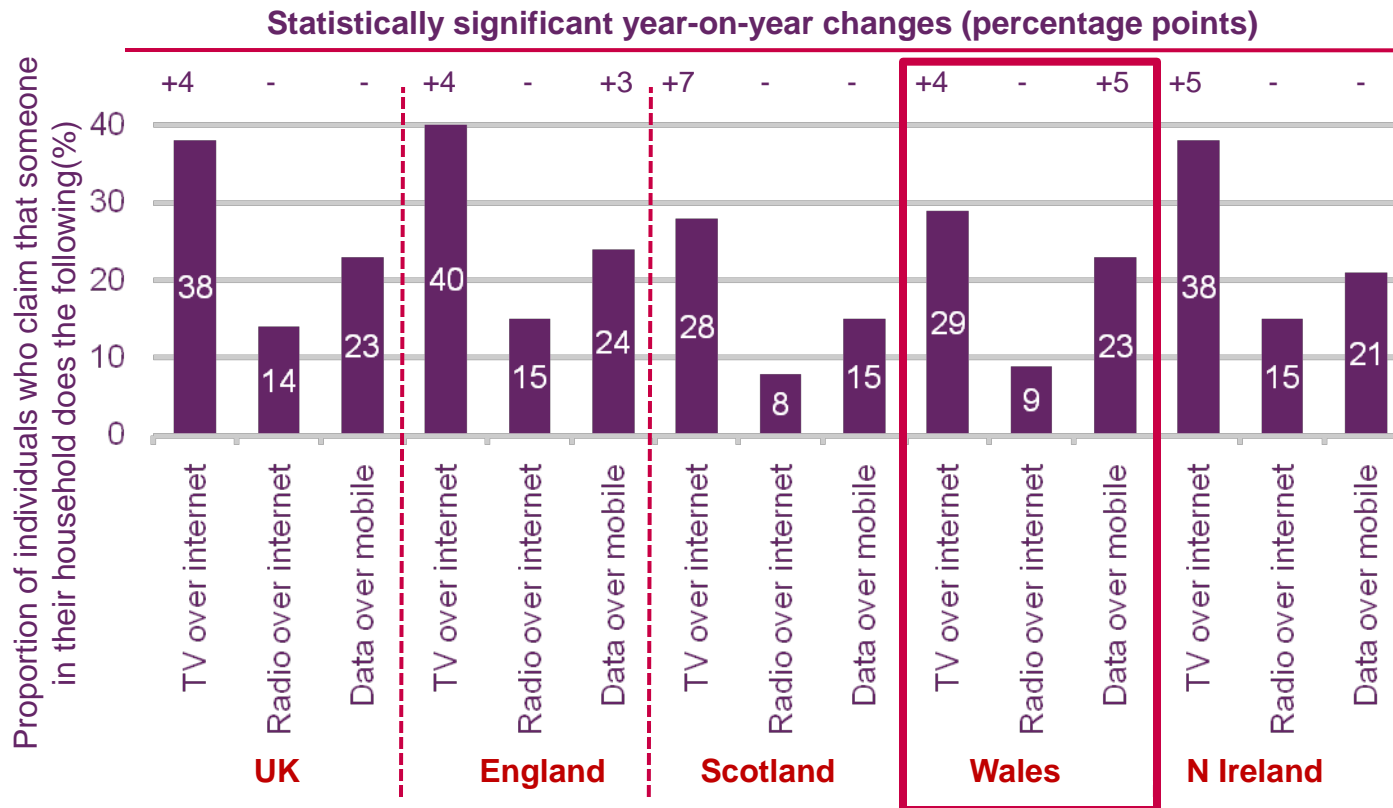
Source: Operators, Annual Reports and Ofcom calculations

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?

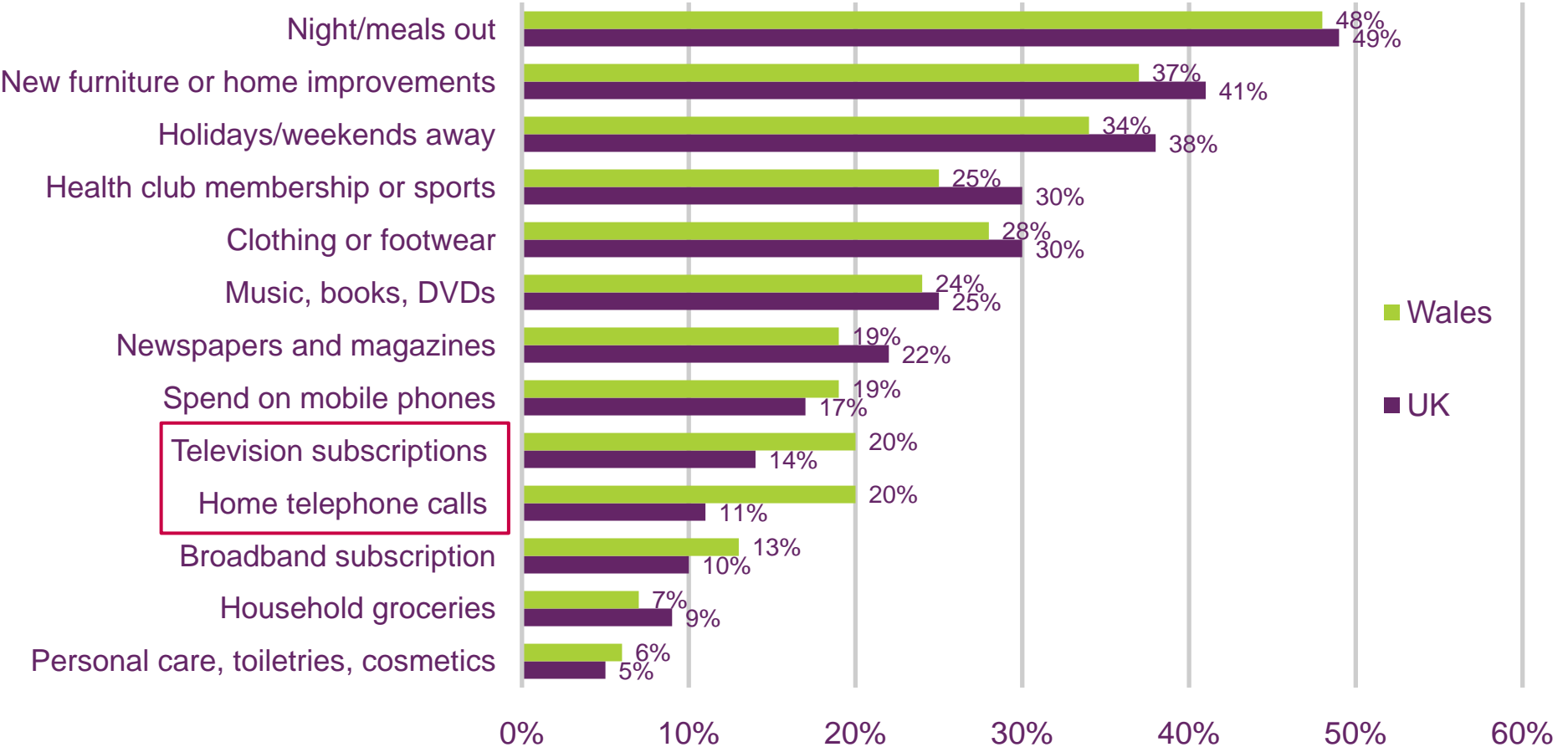
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-fi., using VoIP service, download 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

Items mentioned as first, second or third choice to be cut (%)



Source: Ofcom commissioned research

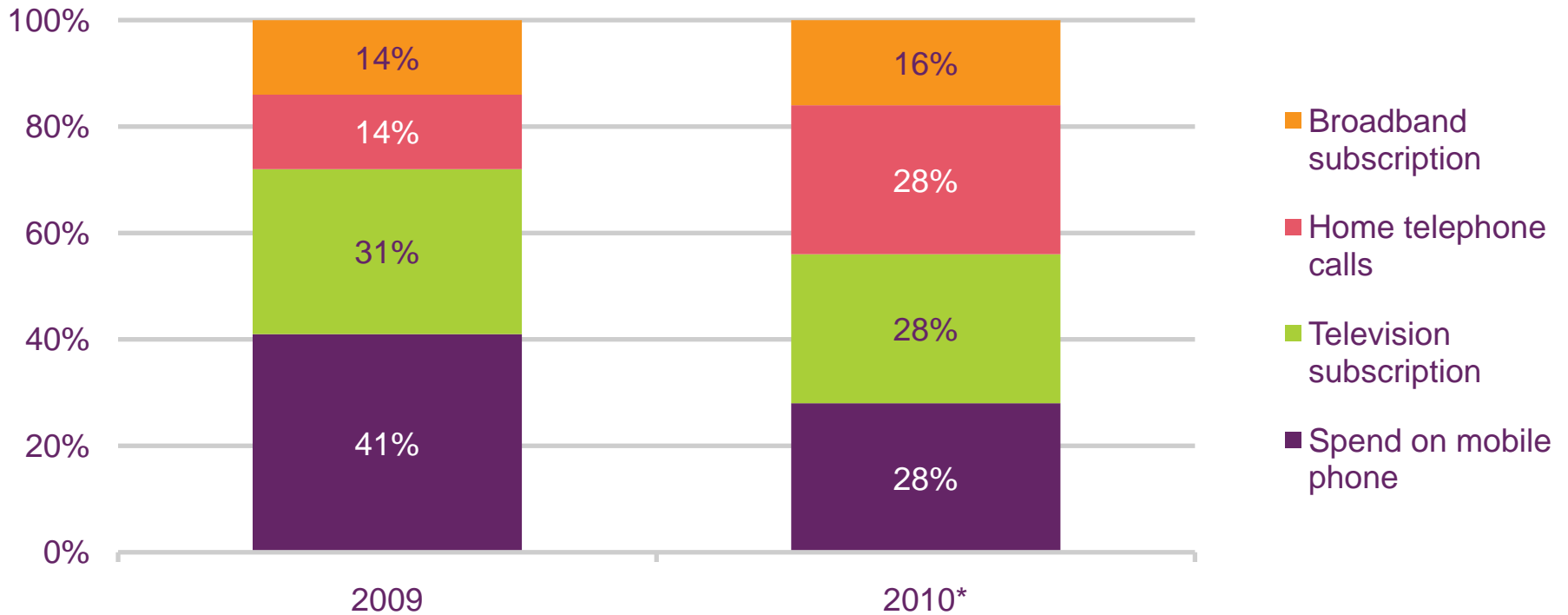
Base: UK (n=2444), Wales (n=203)

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

Proportion of respondents agreeing/disagreeing (%)



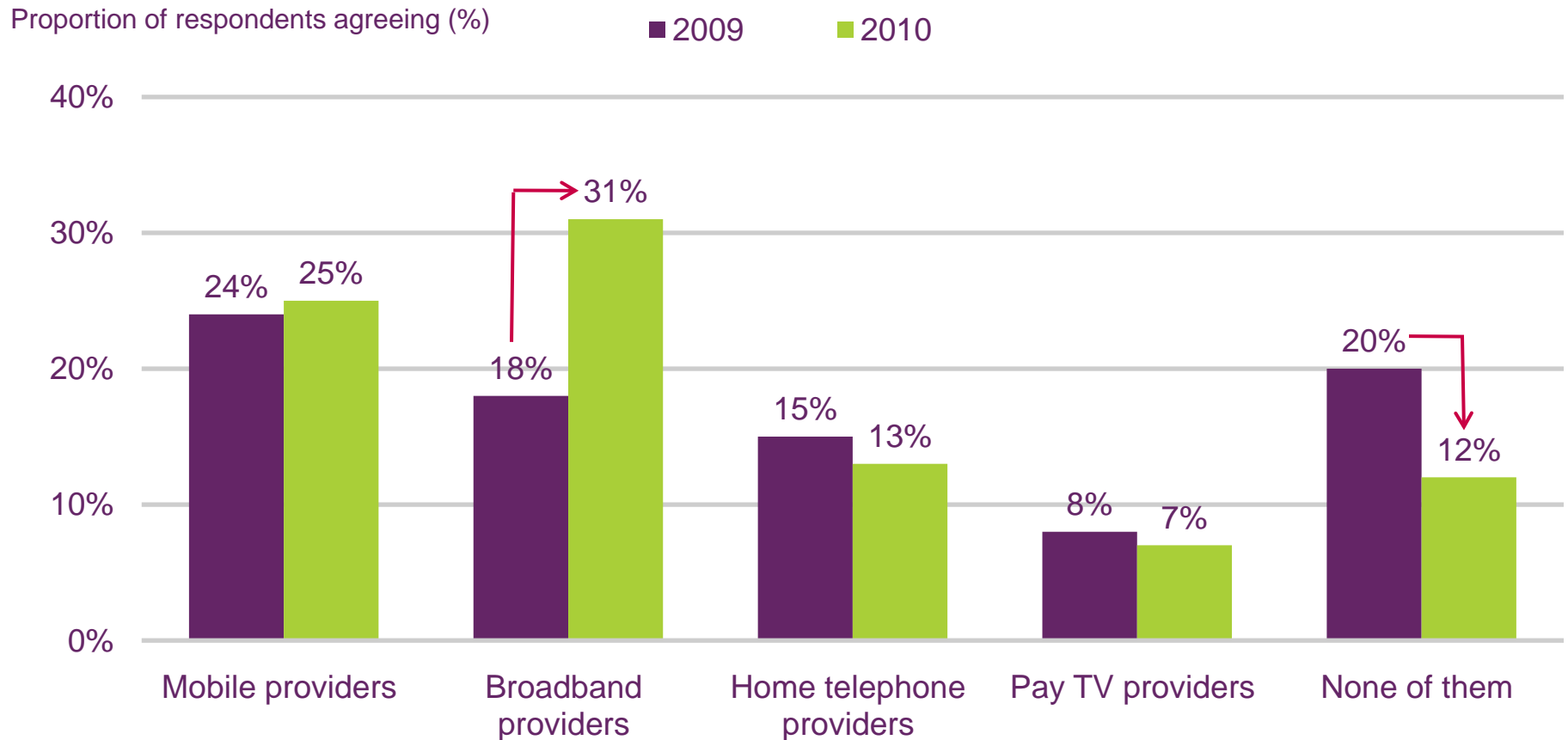
Source: Ofcom-commissioned research

Base: Those with all four communications services 2009 (n=83) 2010 (n=63) *Note small base size for 2010, results should be treated 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 Wales agreeing that communications providers offer better deals now than a year ago



Source Ofcom-commissioned research

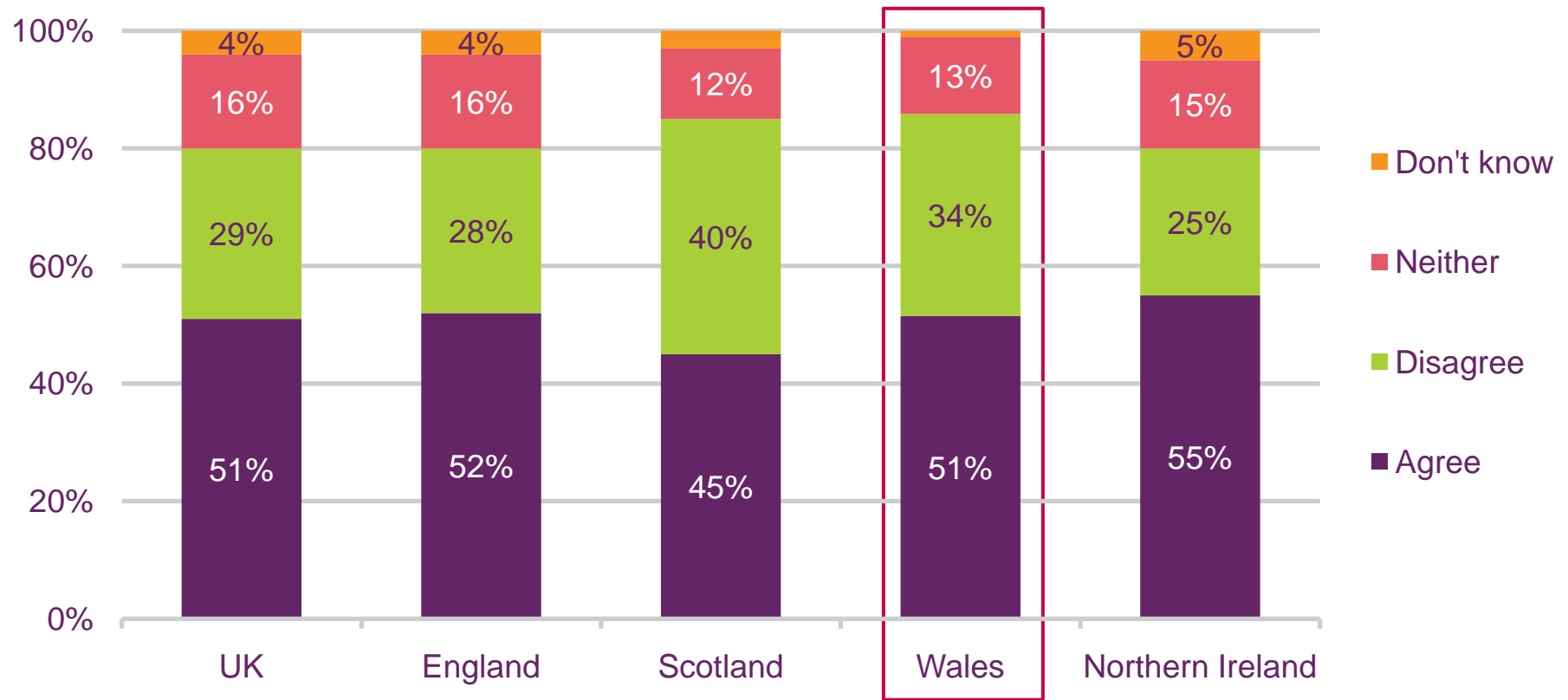
Base: Total sample 2009 (n=202) 2010 (n=203)

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

Proportion of respondents agreeing/disagreeing(%)



Source: Ofcom-commissioned research

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

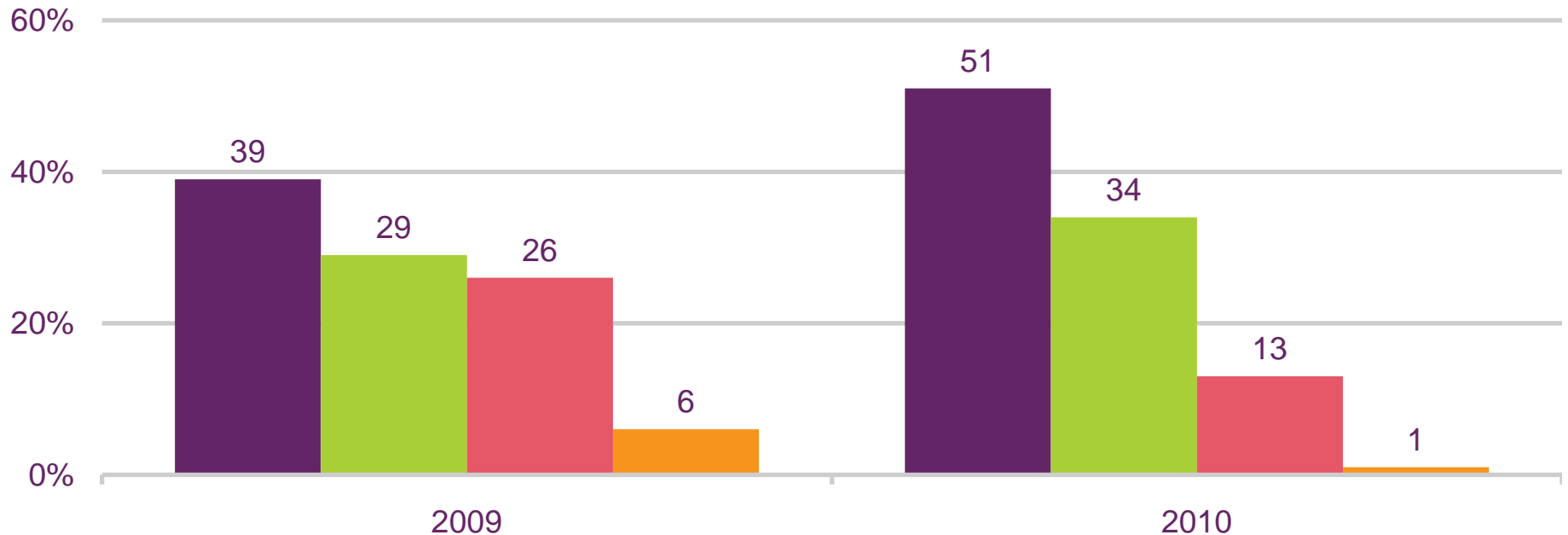
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.14

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

Proportion of respondents agreeing/disagreeing (%)

■ Agree ■ Disagree ■ Neither ■ Don't know



Source: Ofcom-commissioned research

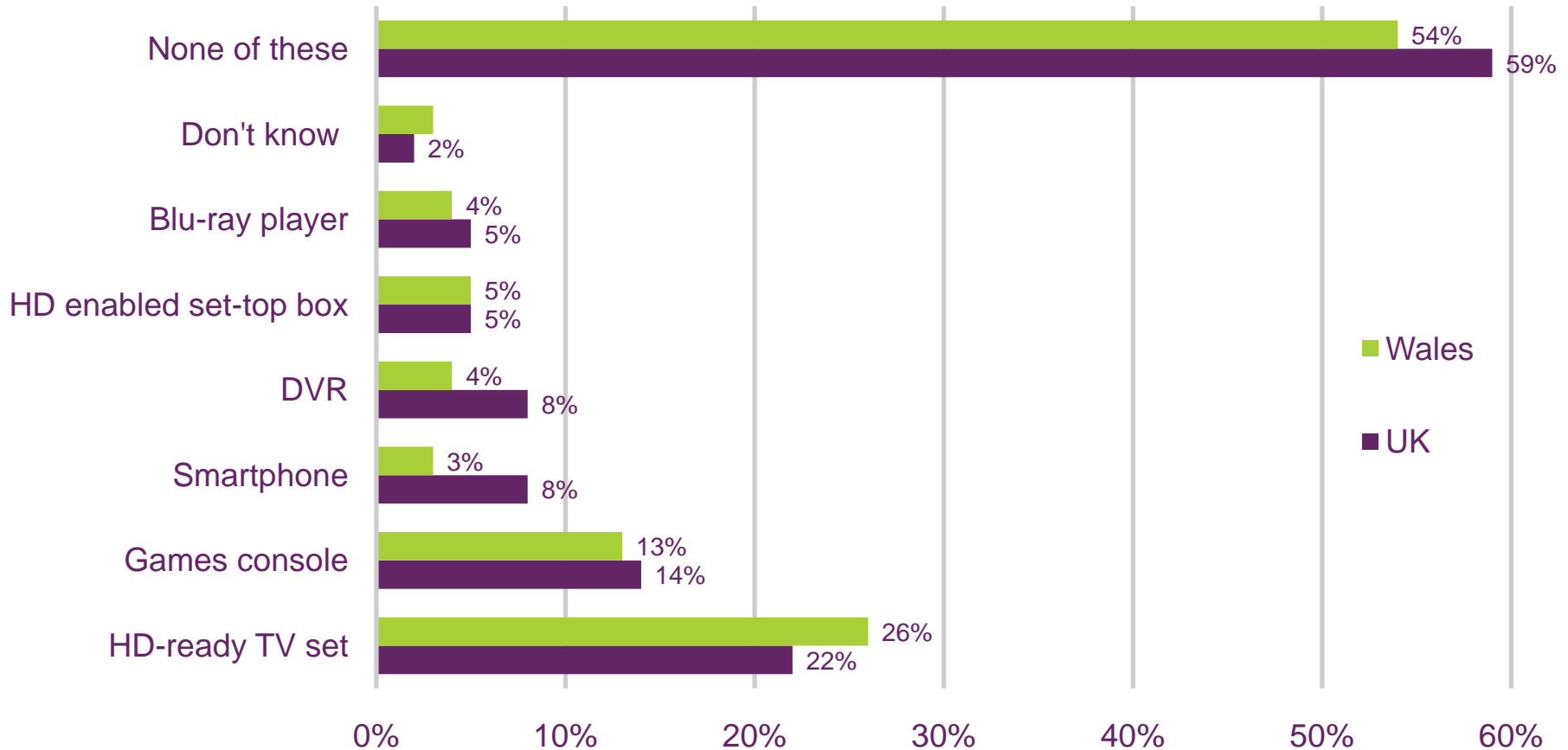
Base: Total sample Wales (n = 203)

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

Proportion of respondents (%)



Source: Ofcom-commissioned research

Base: Total sample UK (n=2444), Wales (n=203)

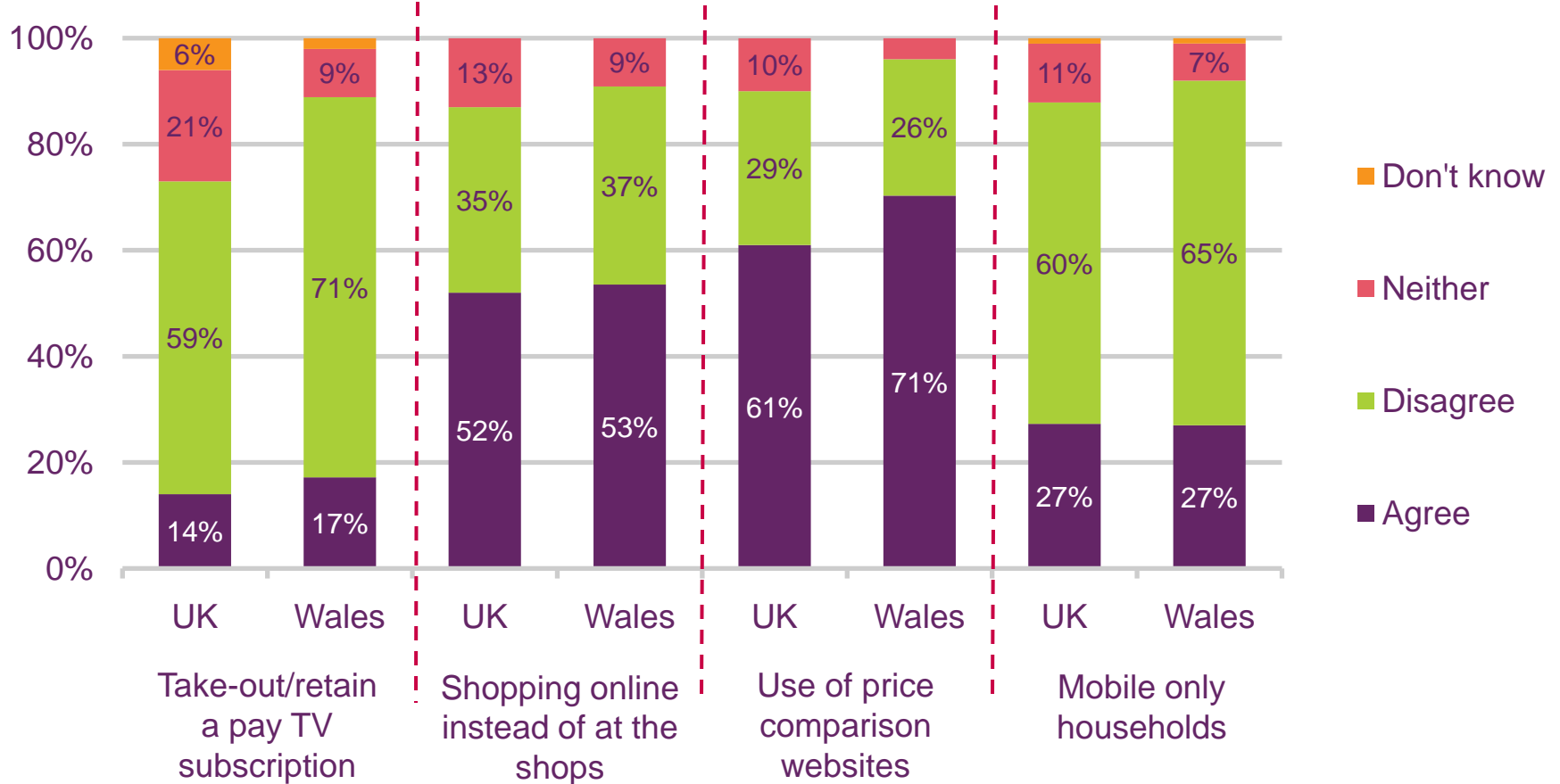
Question: Which, if any, of these products or services have you or your household bought in the last 12 months?

Figure 1.16



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

Proportion of respondents (%)



Source: Ofcom-commissioned research

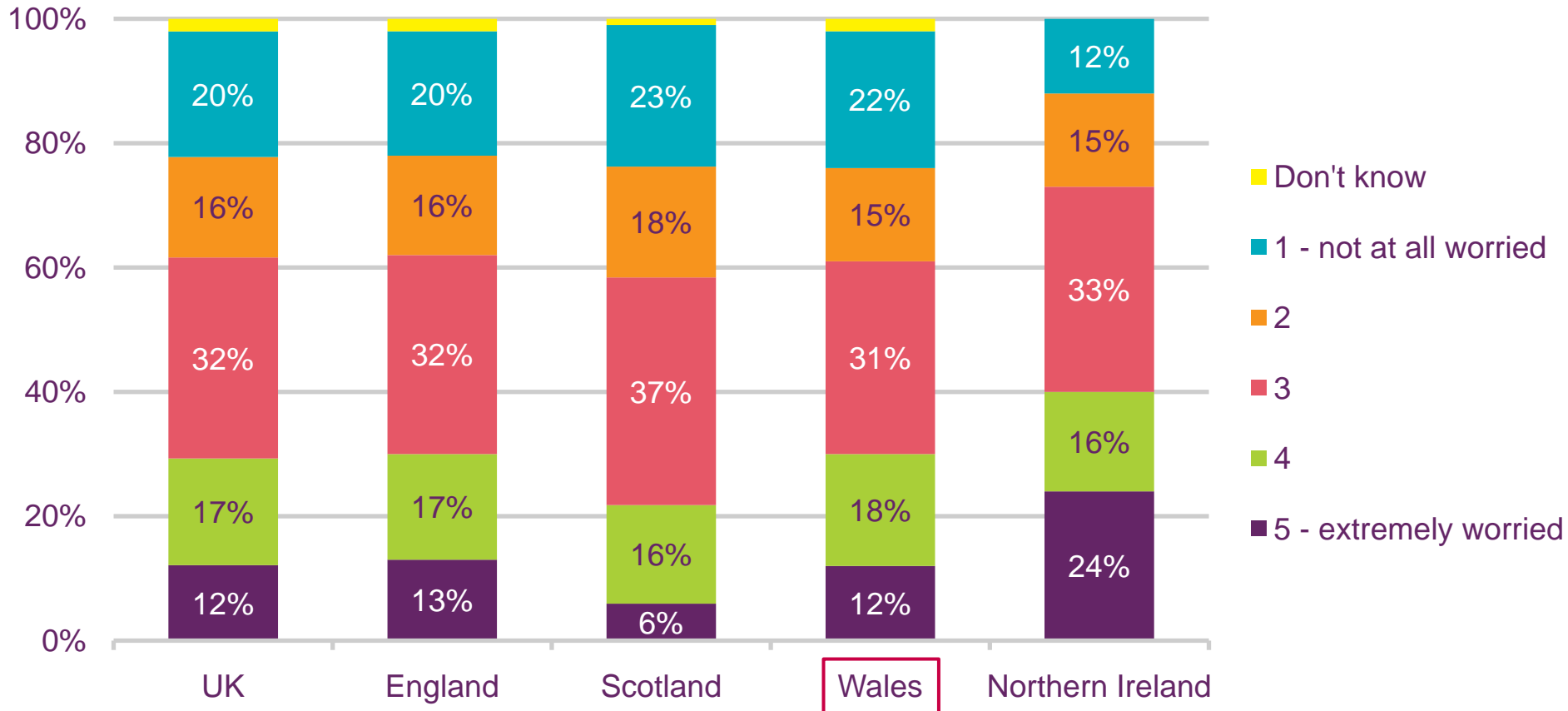
Base: UK (n=1300, 1554, 1554, 2099) Wales (n=98,109, 109, 178)

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

Figure 1.17

Consumer attitudes towards the recession by nation

Proportion of respondents agreeing/disagreeing (%)



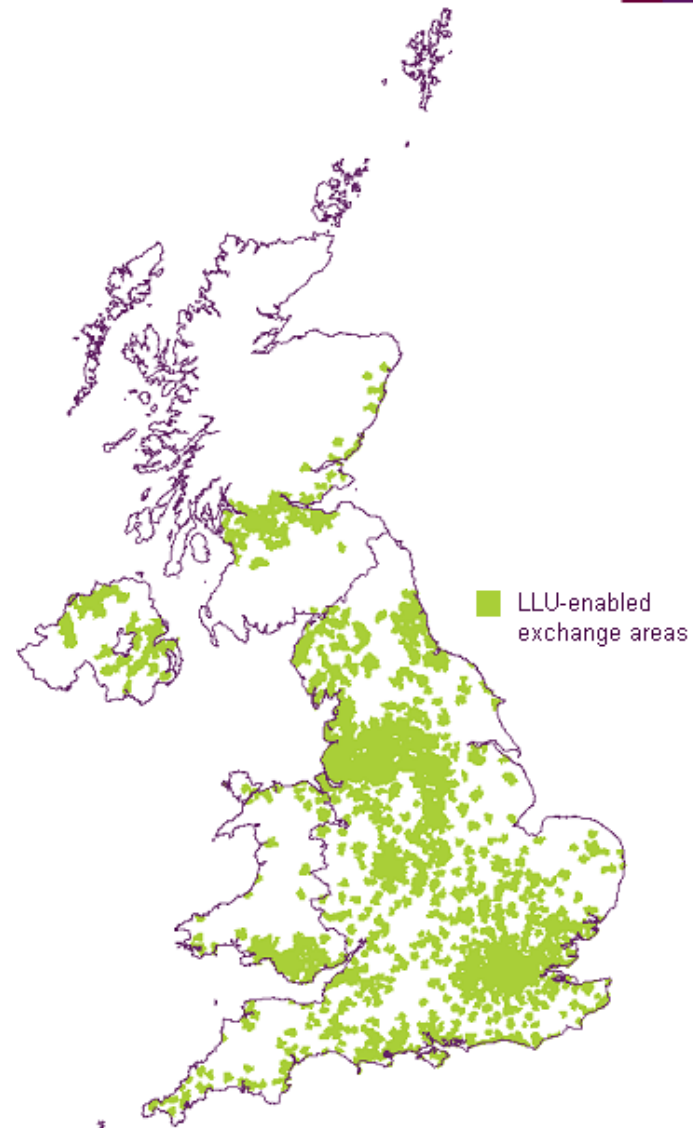
Source: Ofcom-commissioned research

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 1.18

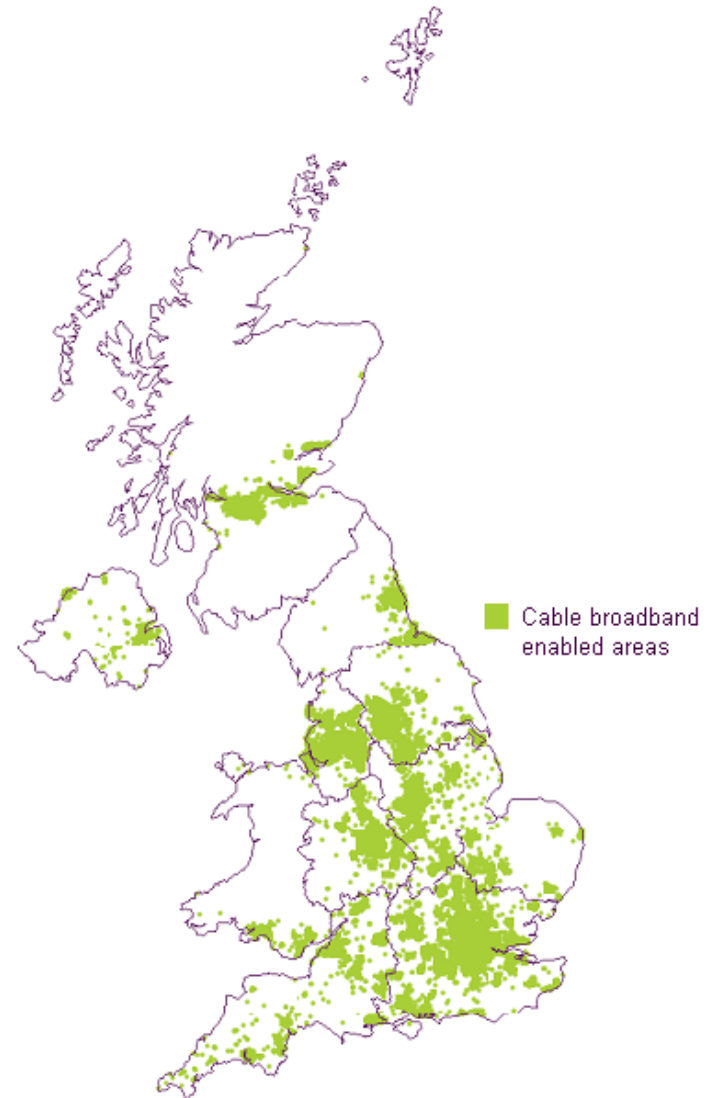
Map showing areas served by unbundled local exchanges



Source: Ofcom/BT, September 2008 data

Figure 1.19

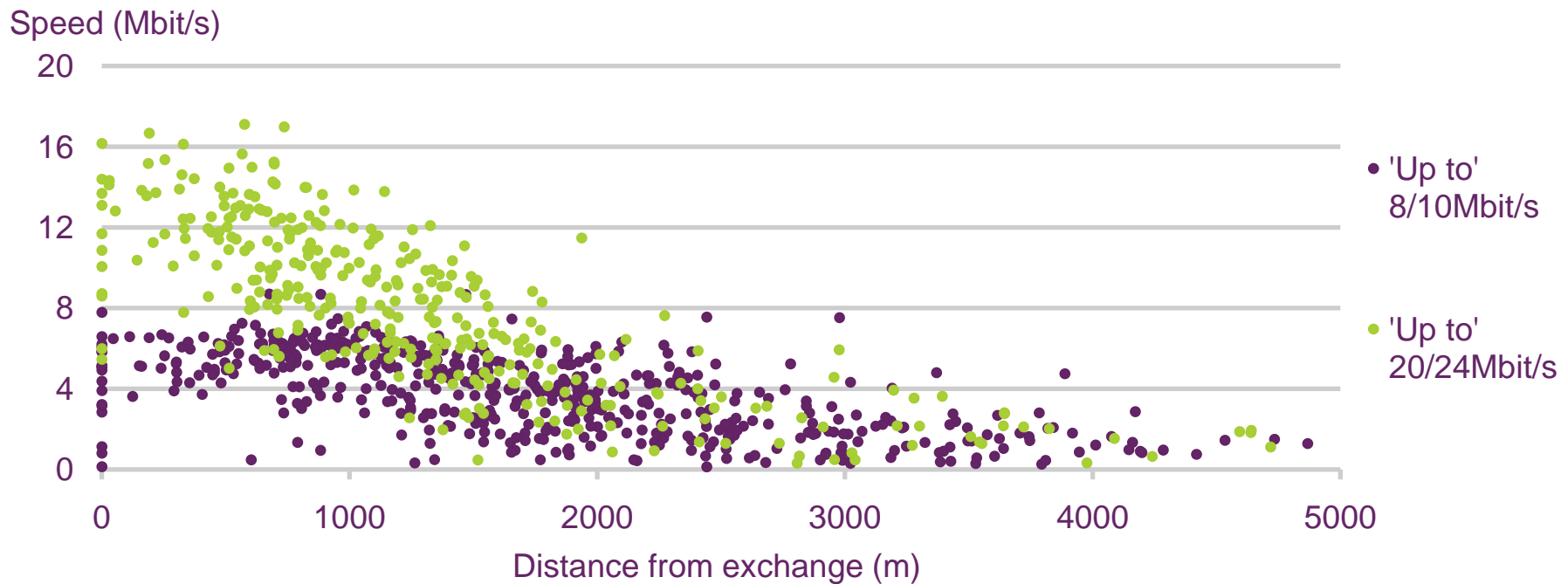
Map of the availability of Virgin Media cable broadband



Source: Ofcom/Virgin Media, September 2008 data

Figure 1.20

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

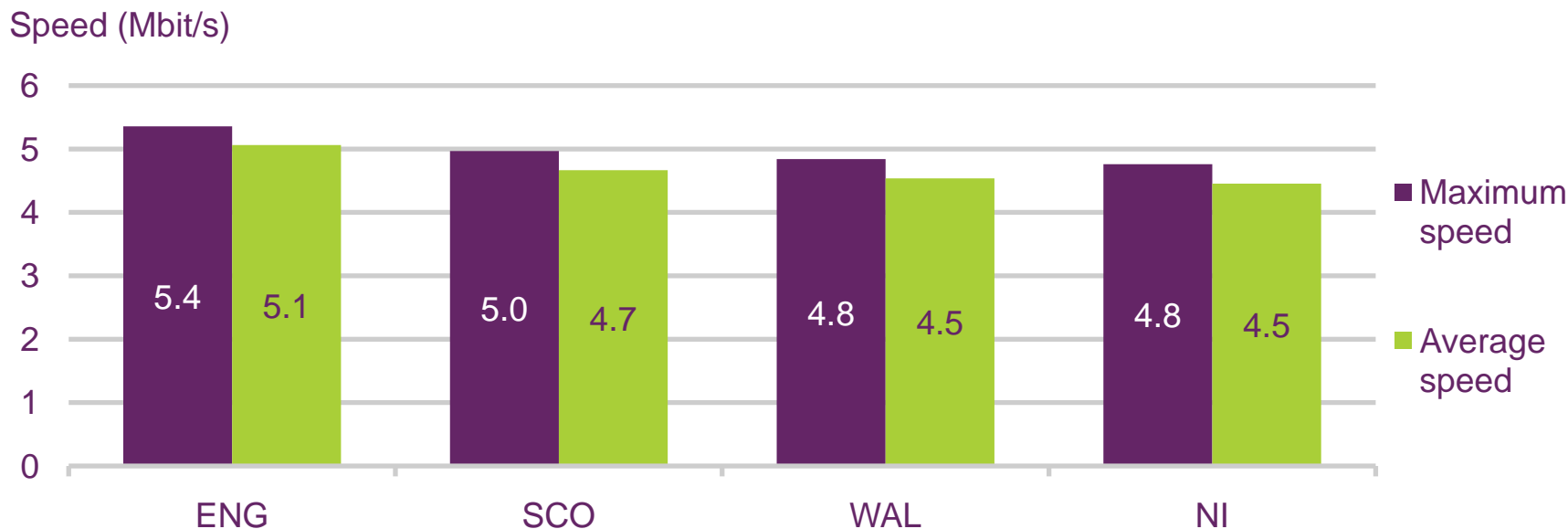


Source: SamKnows measurement data for all panellists with a DSL connection in May 2010

Note: This data is unadjusted so is not directly comparable with data elsewhere which has been weighted for line length

Figure 1.21

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

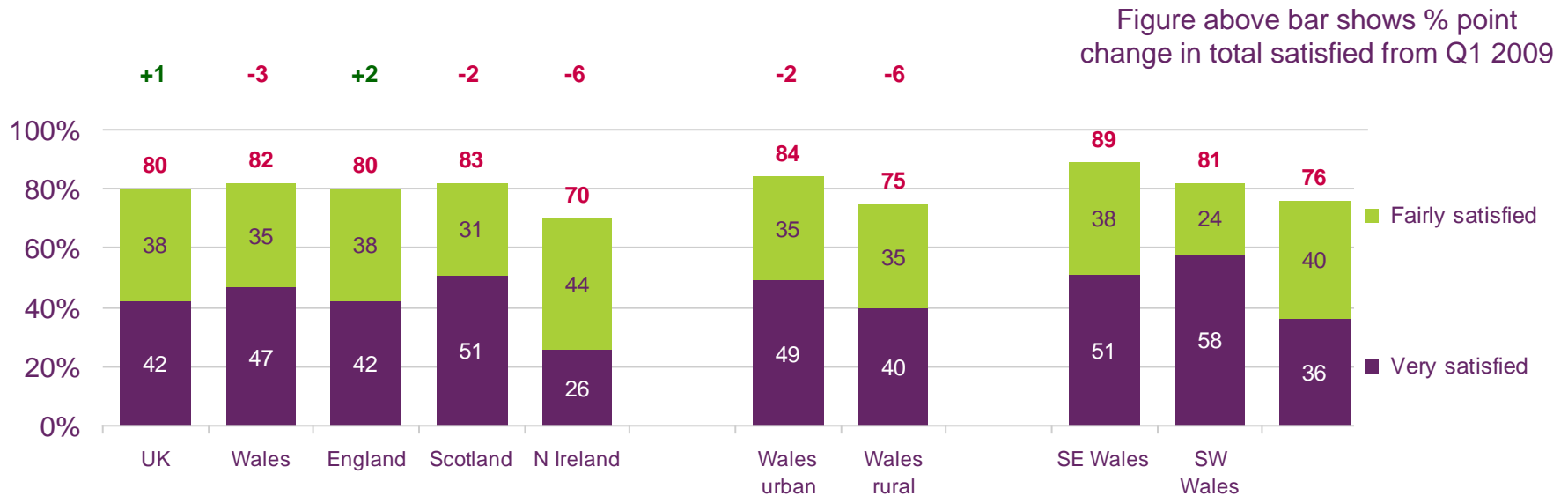


Source: SamKnows measurement data for all panel members with a connection in May 2010, Panel Base: 1506

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

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)?

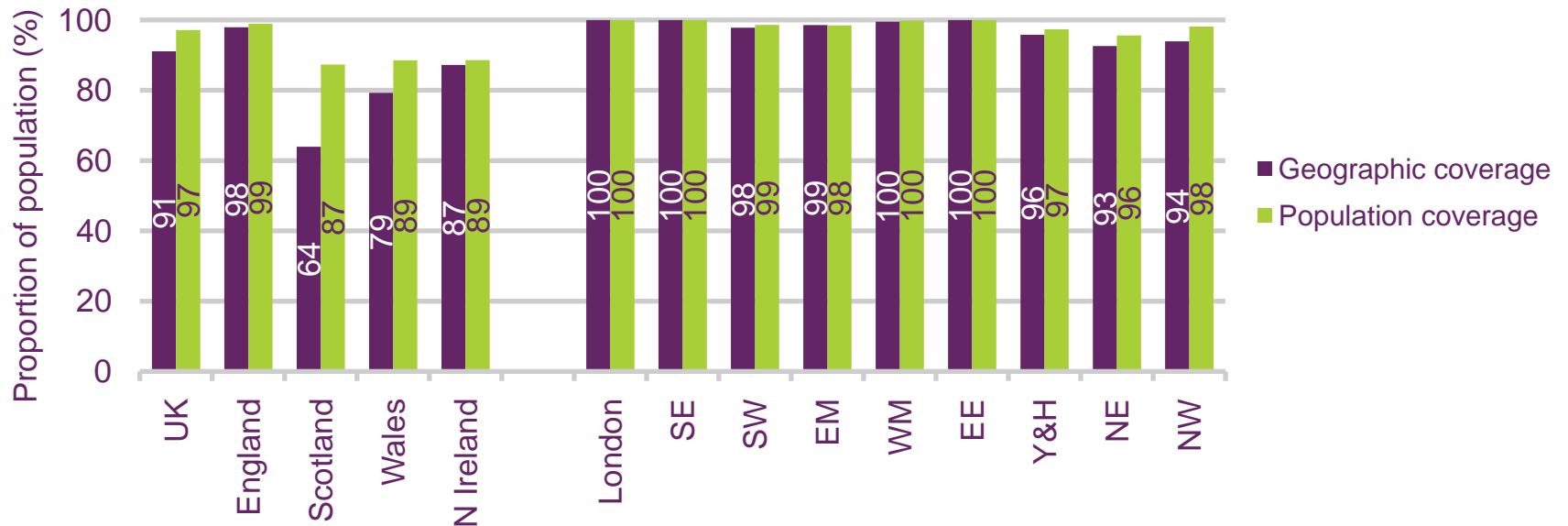
Source: Ofcom research, Quarter 1 2010

Base: Adults aged 15+ with a fixed broadband connection at home (n= 5410 UK, 604 Wales, 3559 England, 778 Scotland, 469 Northern Ireland, 444 Wales urban, 160 Wales rural, 165 South East Wales, 211 South West Wales, 228 North/ Mid Wales)

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

Figure 1.23

2G mobile phone population and geographic coverage (90%)

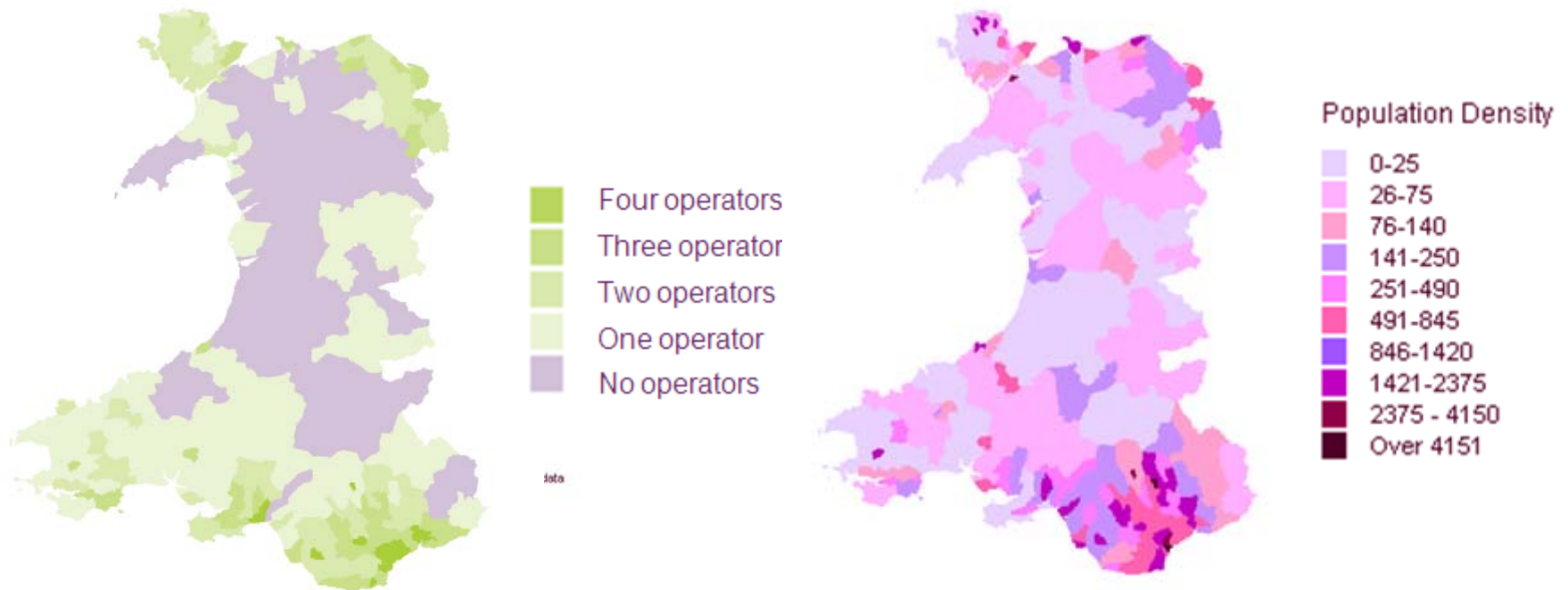


Source: Ofcom/ GSM Association / Europa Technologies; Q2 2010

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

Map of 2G mobile phone geographic coverage in Wales

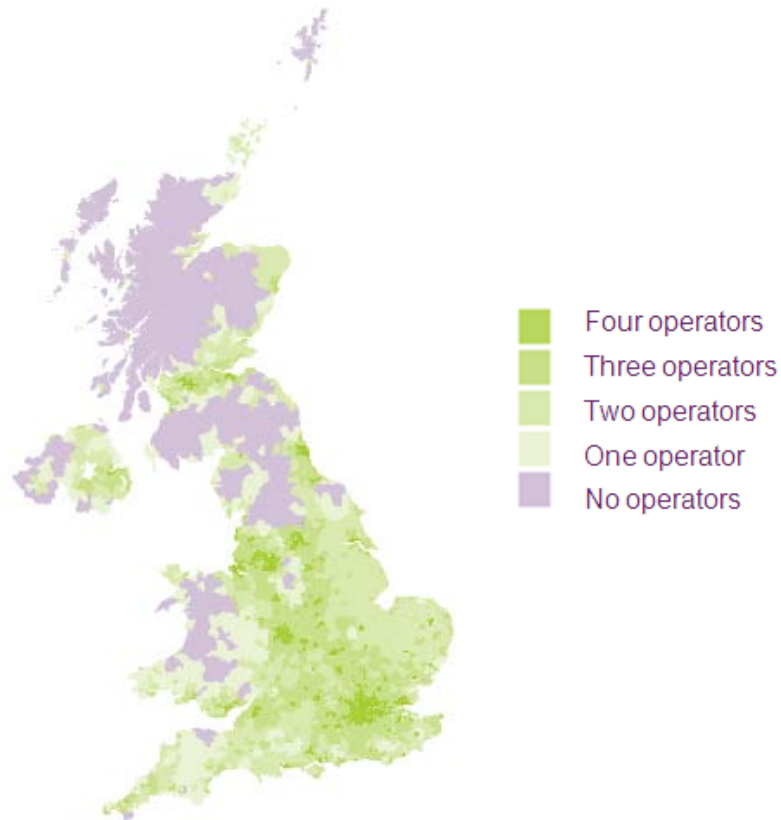


Source: Ofcom / GSM Association / Europa Technologies; Q2 2010

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

Map of 2G mobile phone geographic coverage in Wales

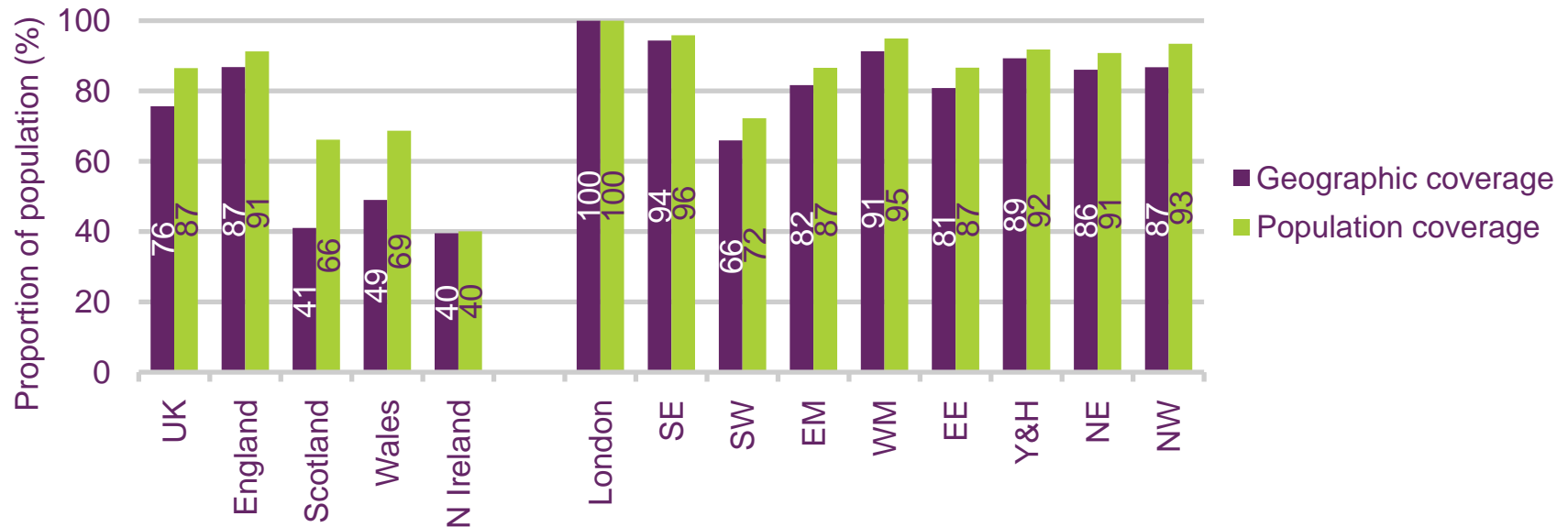


Source: Ofcom / GSM Association / Europa Technologies; Q2 2010

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 population and geographic coverage (90%)

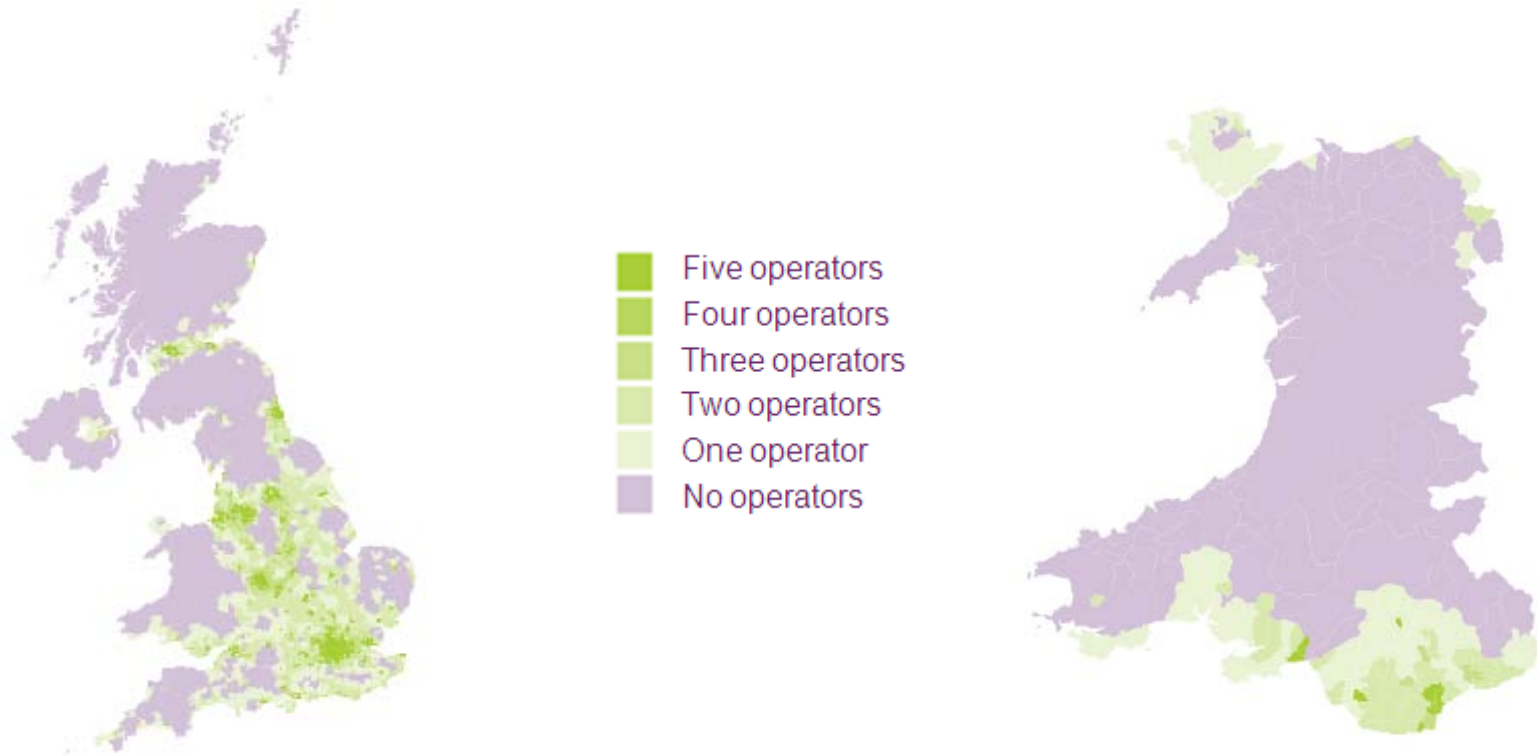


Source: Ofcom/ GSM Association / Europa Technologies; Q2 2010

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

Map of 3G mobile phone geographic coverage in Wales



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



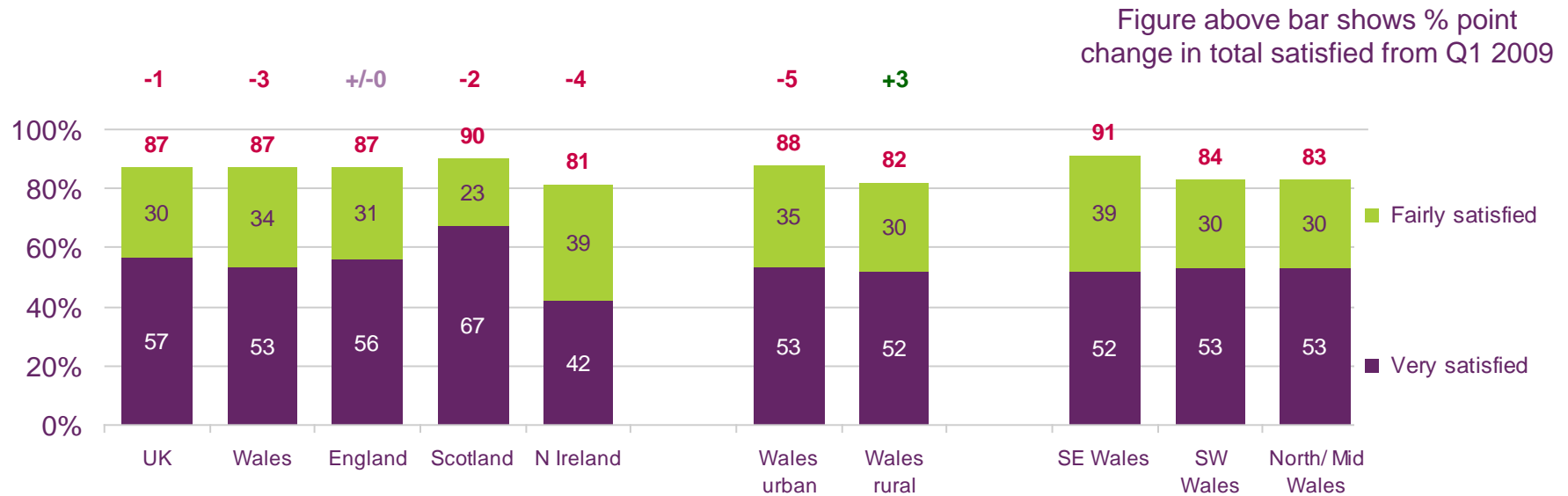
Source: Mostly Mobile, Communications Consumer Panel report

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

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 2010

BBase: Adults aged 15+ who personally use a mobile phone (n = 7826 UK, 923 Wales, 5008 England, 1237 Scotland, 658 Northern Ireland, 683 Wales urban, 240 Wales rural, 293 South East Wales, 303 South West Wales, 327 North/ Mid Wales)

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