

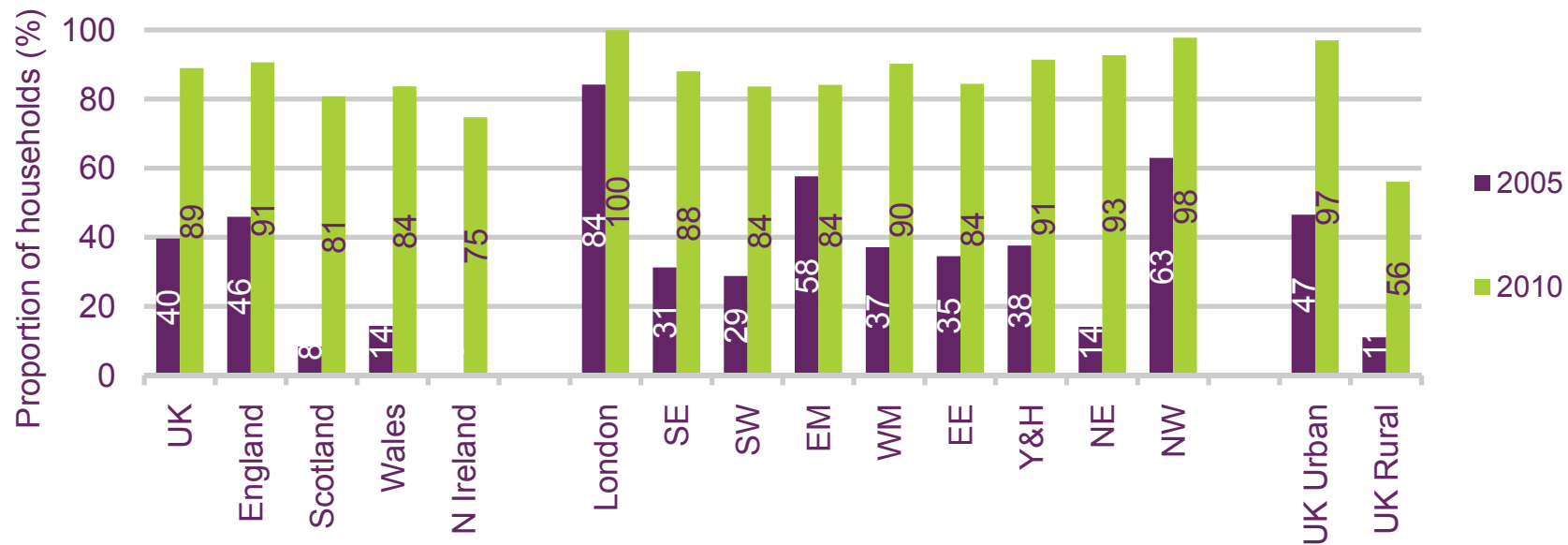
Telecoms and networks

Proportion of households connected to an ADSL-enabled BT exchange



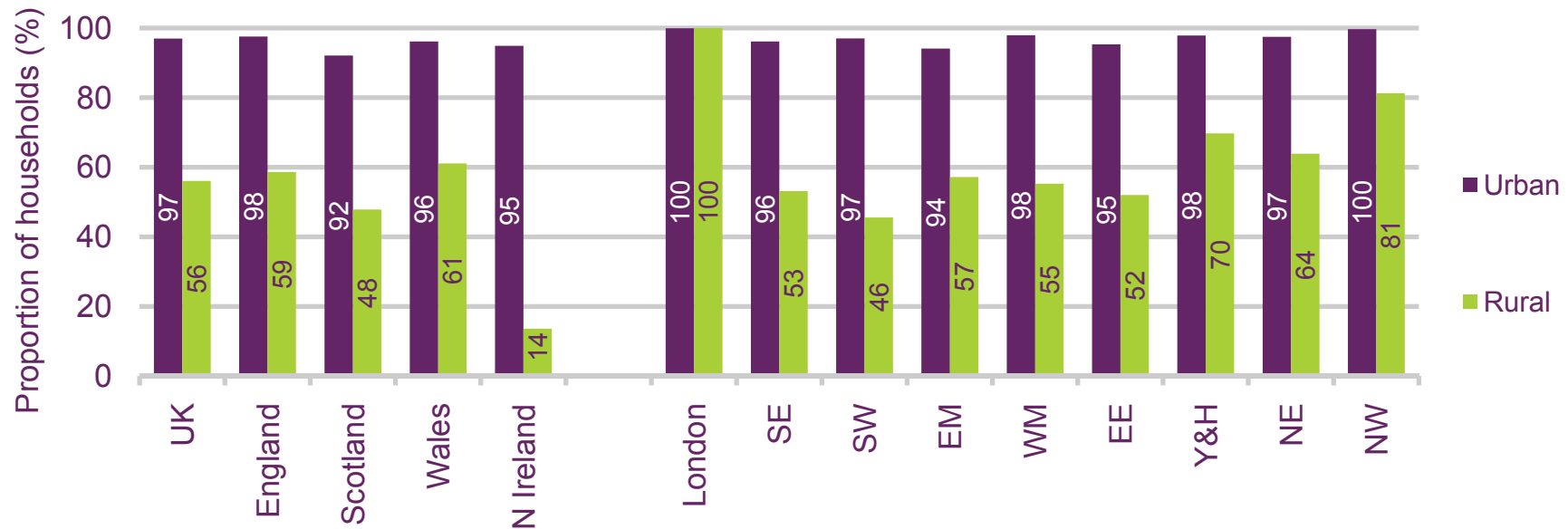
Source: Ofcom / BT, December 2010 data

Proportion of households in connected to an unbundled local exchange



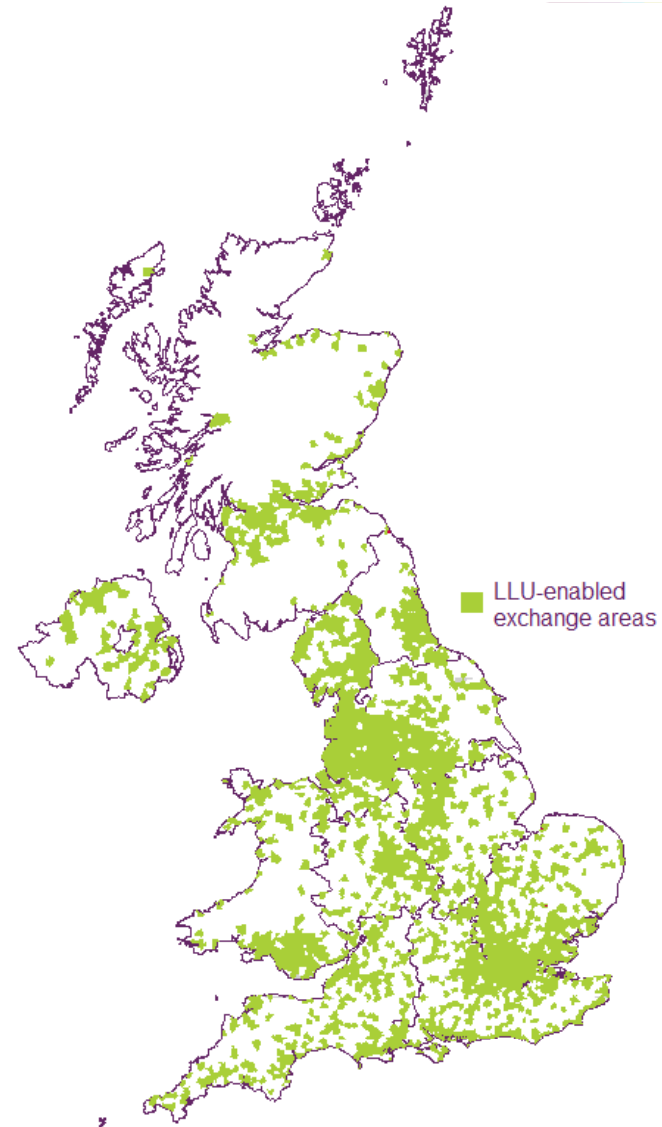
Source: Ofcom / BT, December 2010 data

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



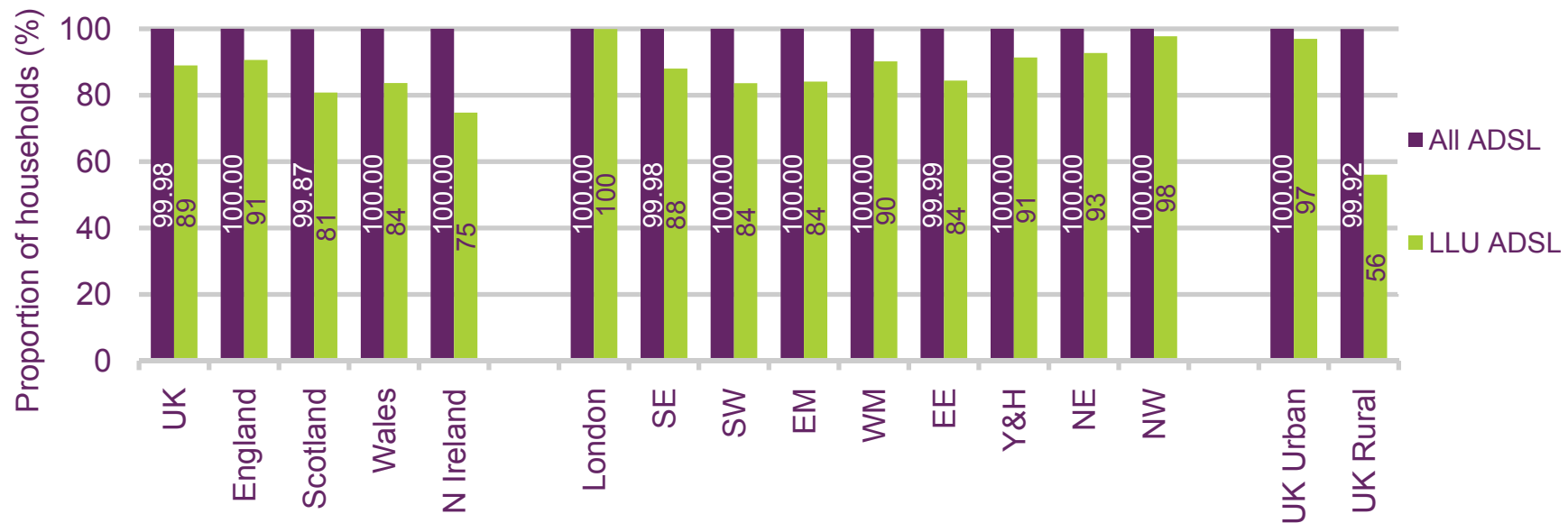
Source: Ofcom / BT, December 2010 data

Map showing areas served by unbundled local exchanges



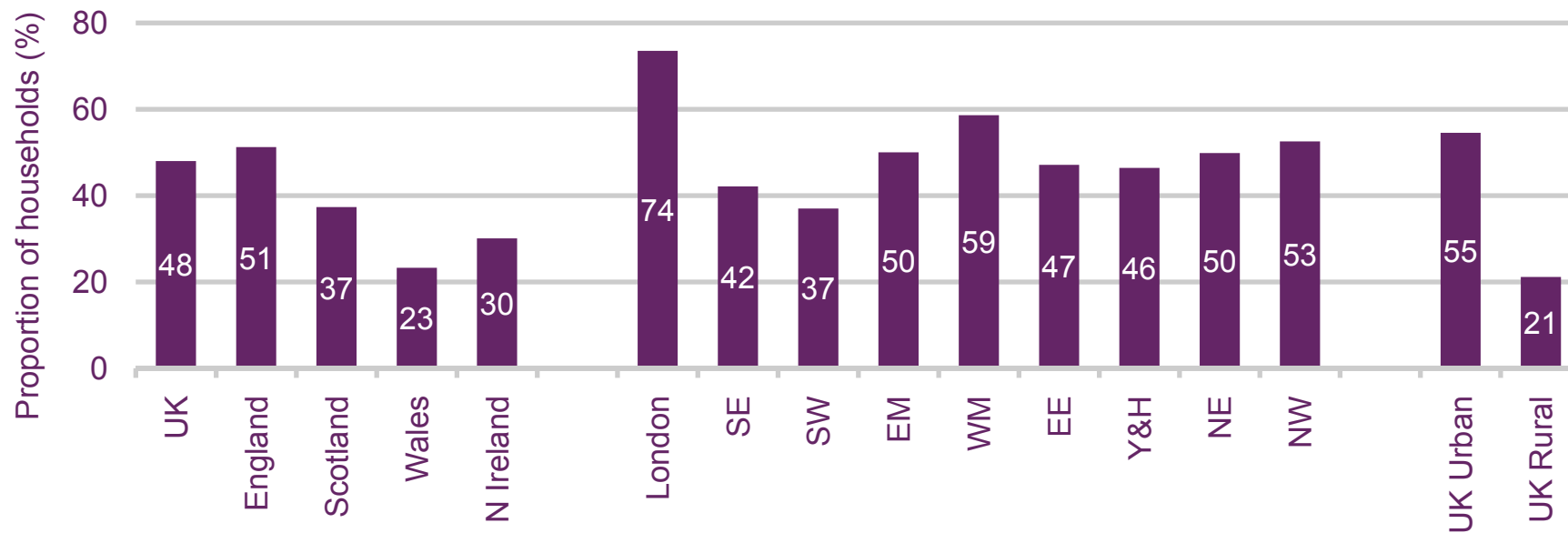
Source: Ofcom/BT, December 2010 data

Proportion of homes connected to ADSL-enabled and unbundled exchanges



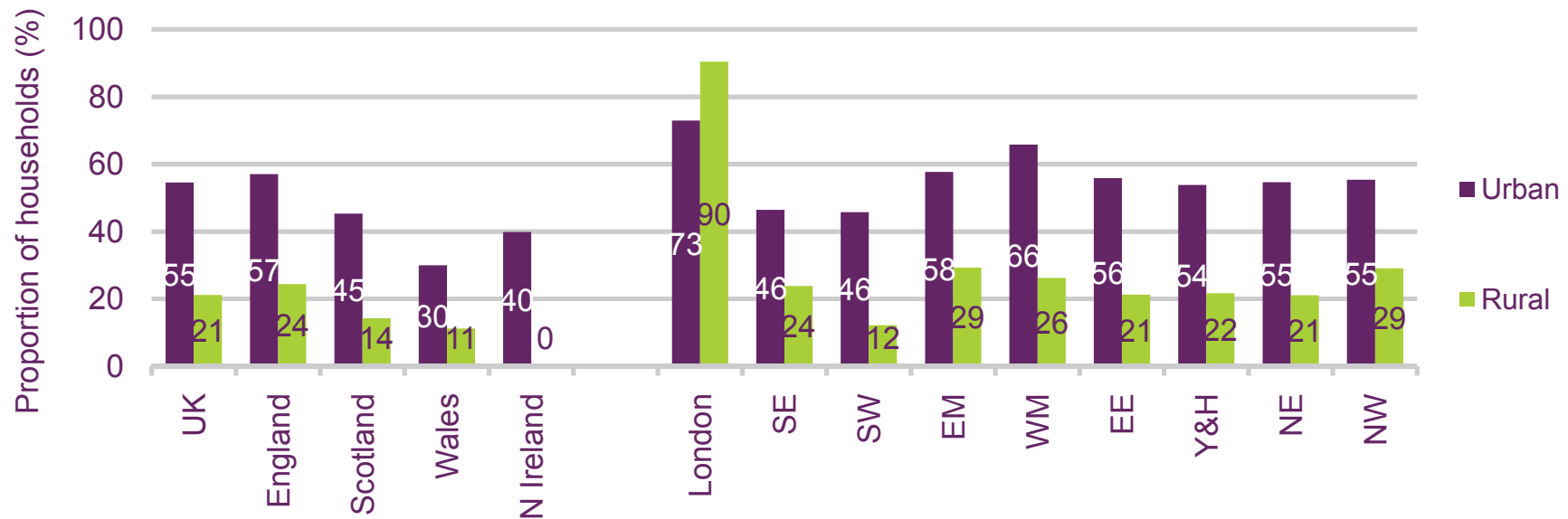
Source: Ofcom / BT, December 2010 data

Proportion of households passed by Virgin Media broadband



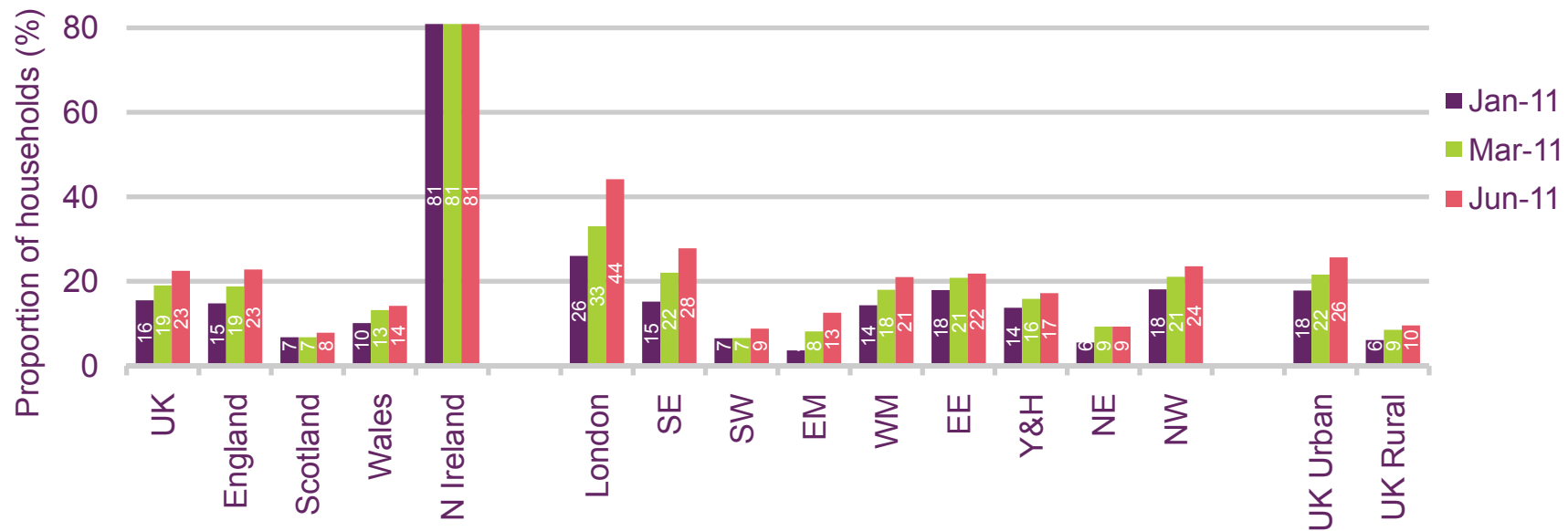
Source: Ofcom / Virgin Media, June 2010 data

Proportion of households in urban and rural areas passed by Virgin Media broadband



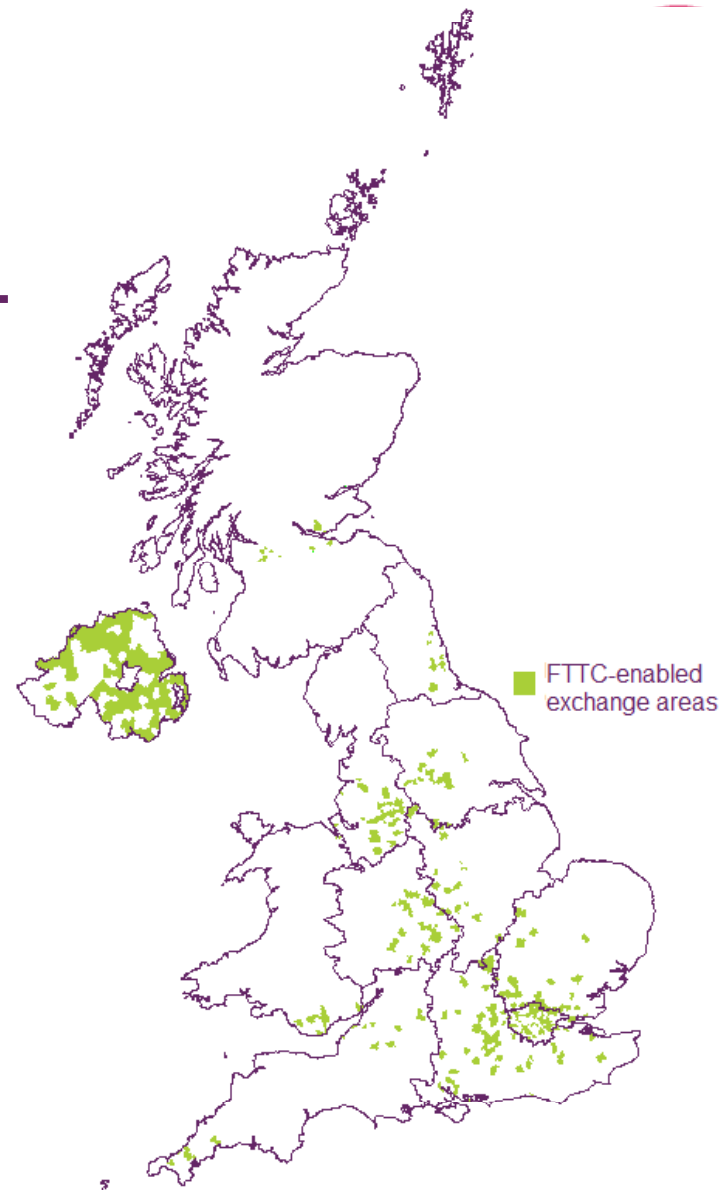
Source: Ofcom/Virgin Media, June 2010 data

Proportion of households connected to an FTTC-enabled exchange



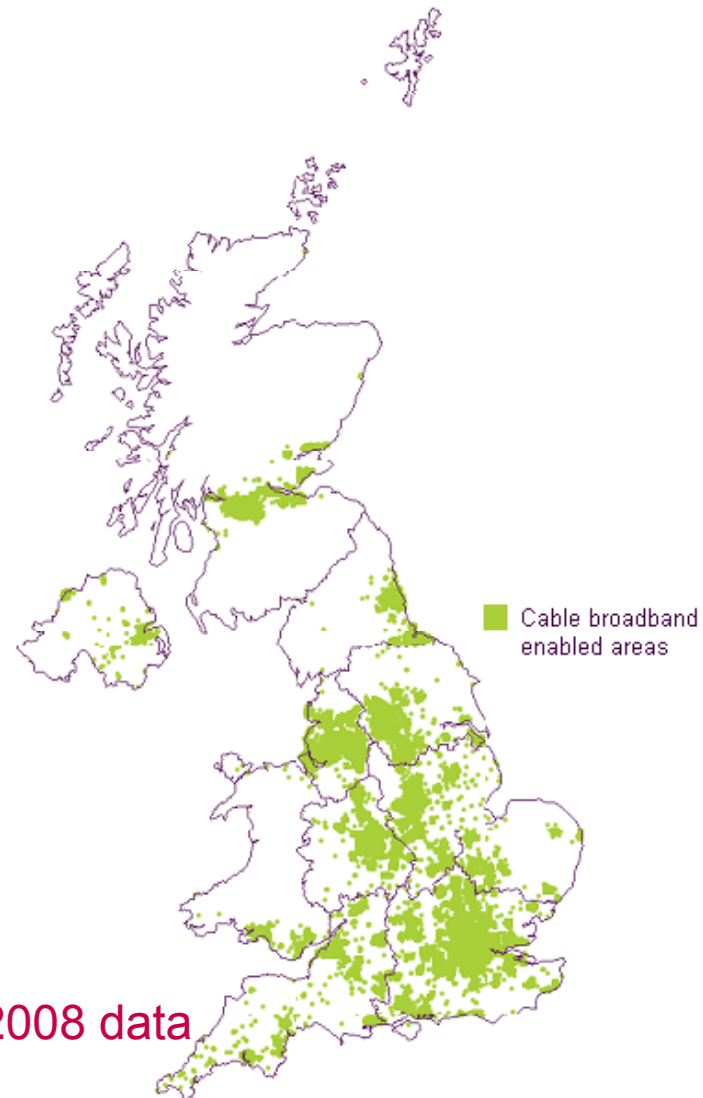
Source: Ofcom / BT

Map of FTTC-enabled BT exchange areas



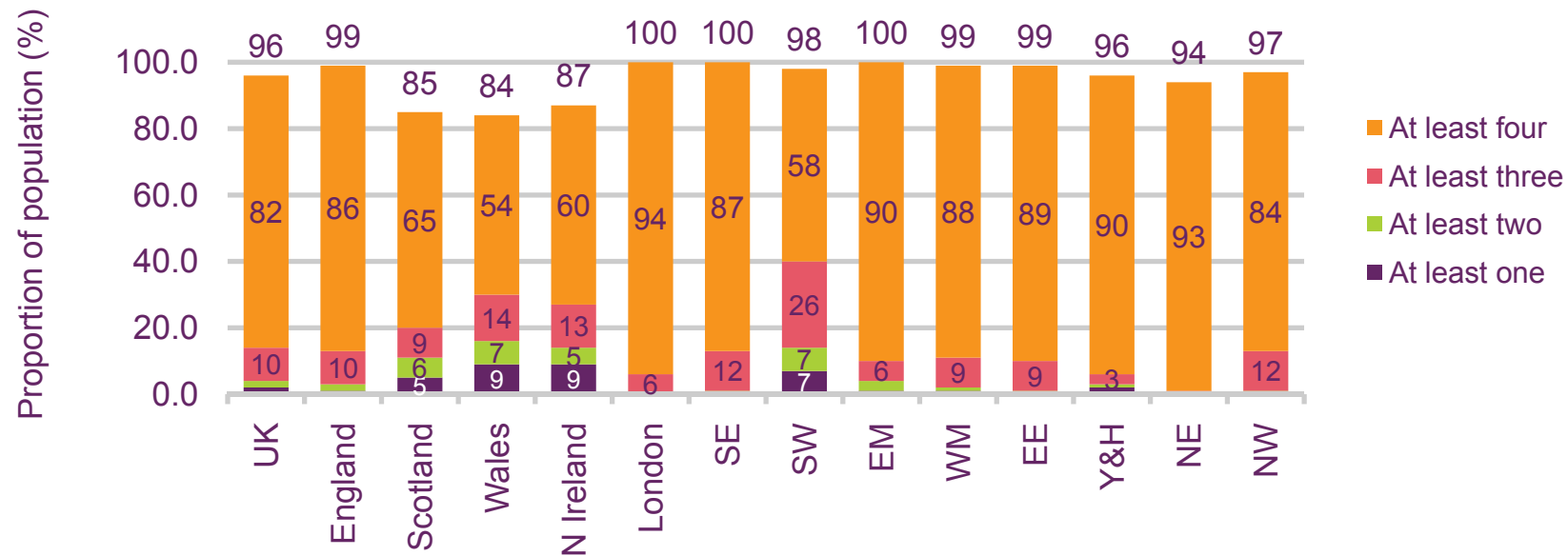
Source: Ofcom / BT, June 2011 data

Map of the availability of Virgin Media cable broadband



Source: Ofcom/Virgin Media, September 2008 data

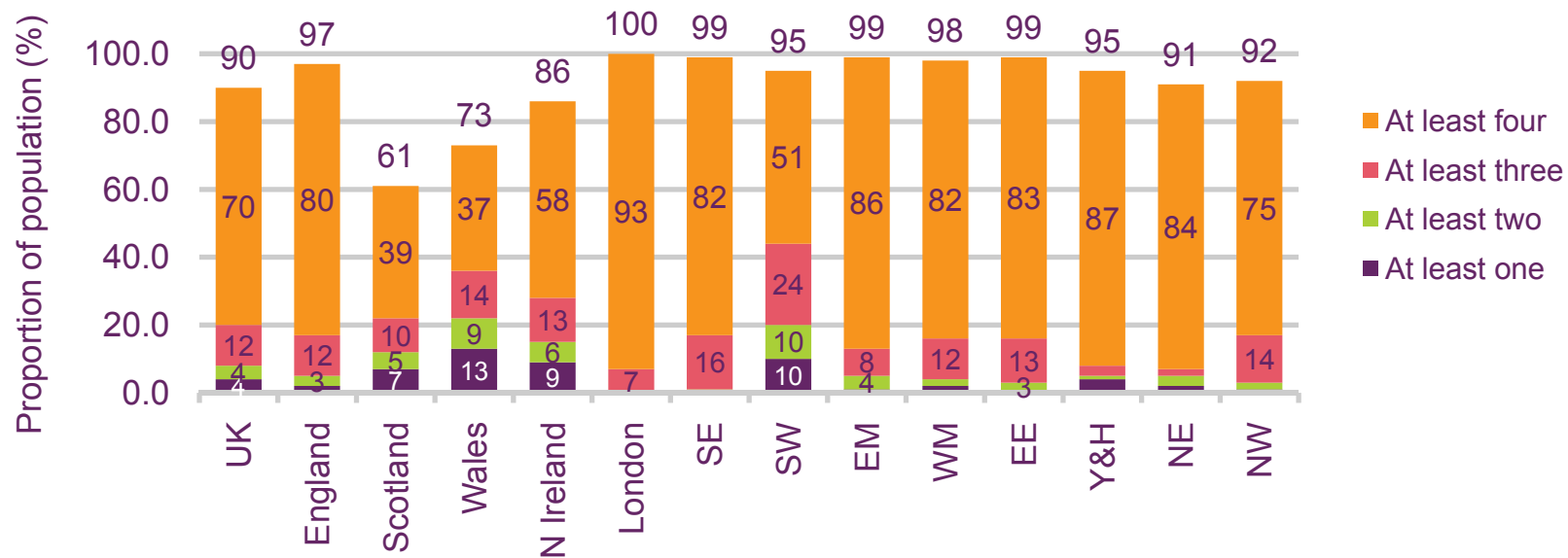
2G mobile phone population coverage (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the 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 2010 report.

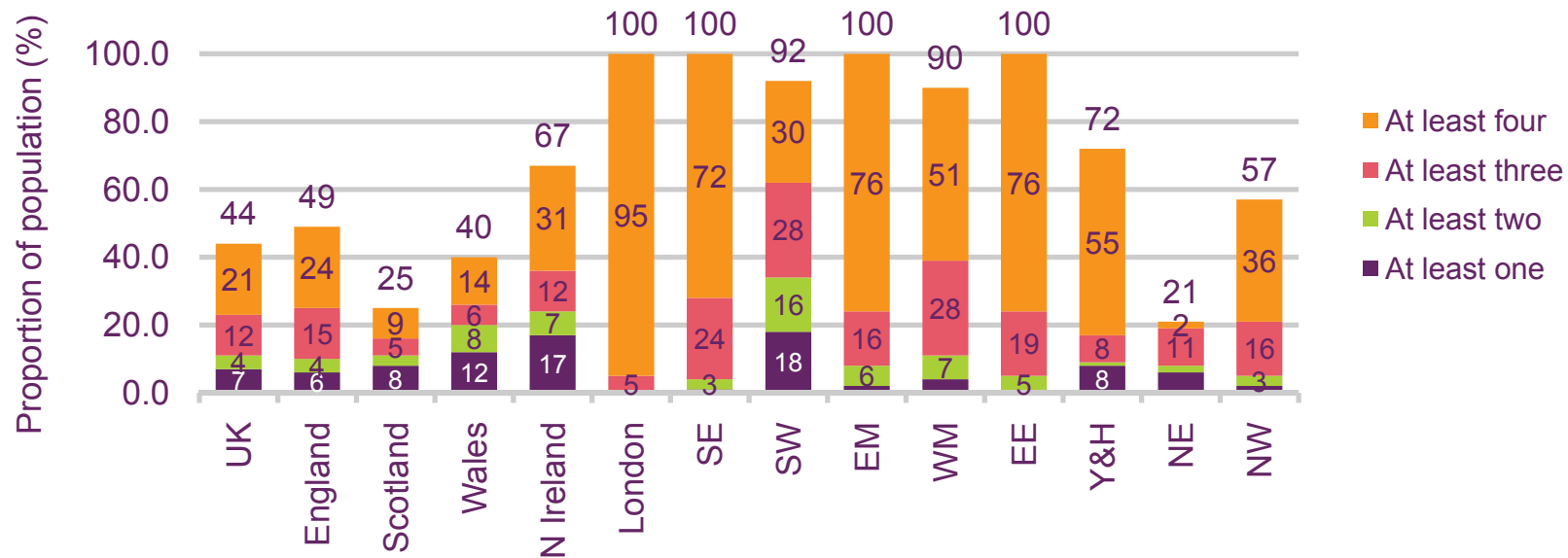
2G mobile phone geographic coverage by postcode (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the 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 2010 report.

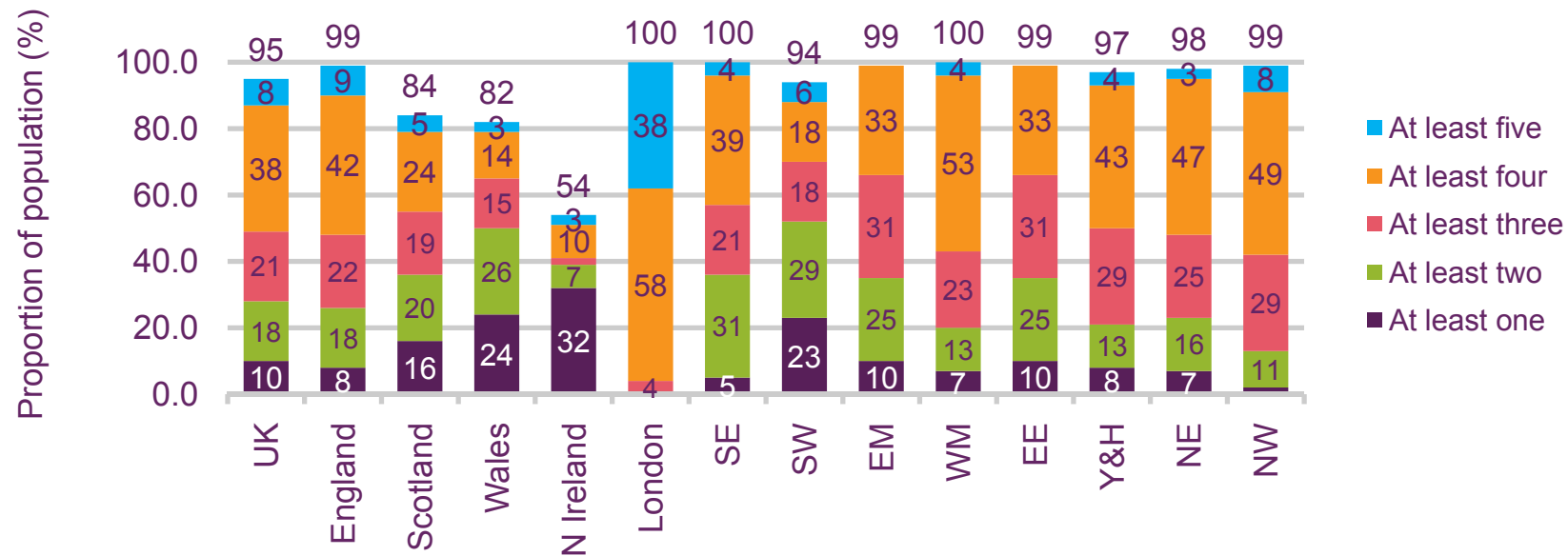
2G mobile phone geographic coverage by land mass (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of land mass (based on km² units) where at least one operator had at least 90% 2G area coverage.

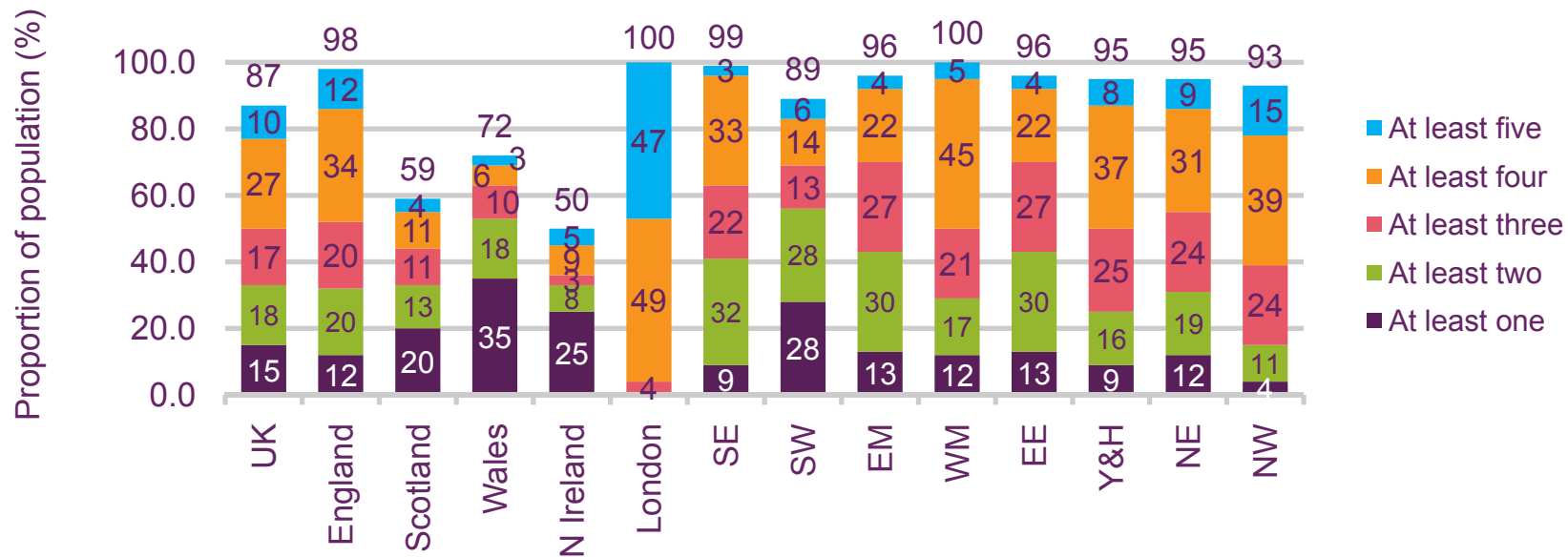
3G mobile phone population coverage (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the 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 2010 report.

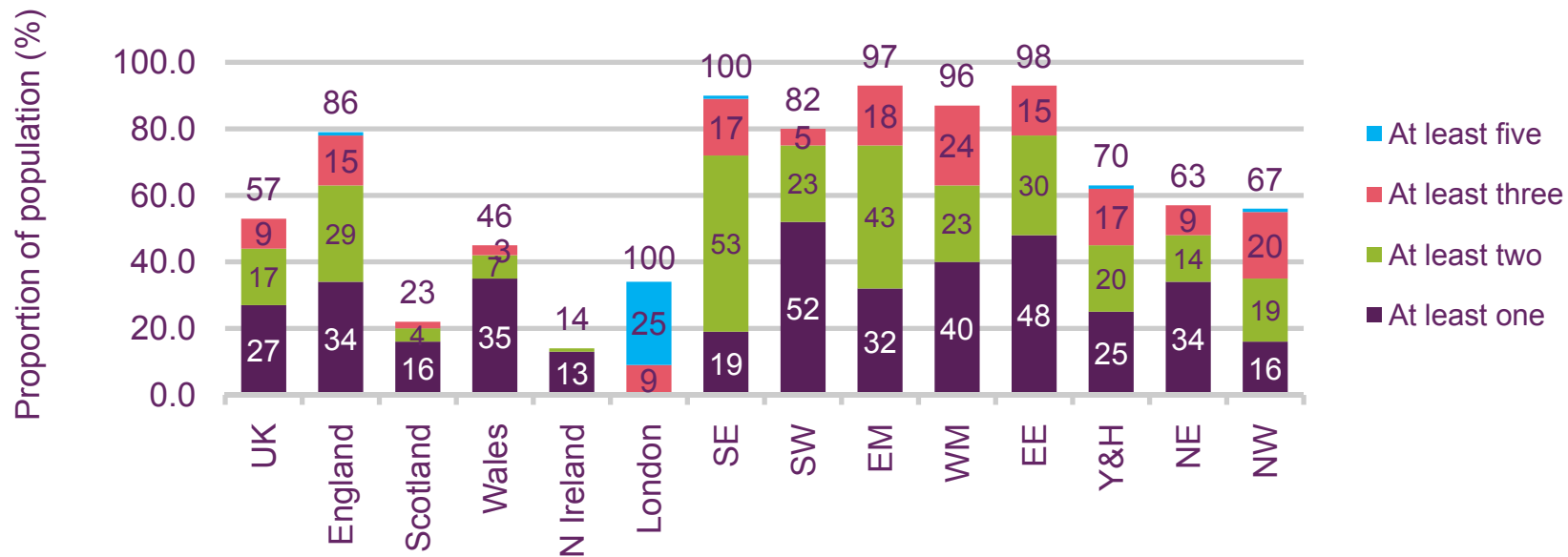
3G mobile phone geographic coverage by postcode (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the 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 2010 report.

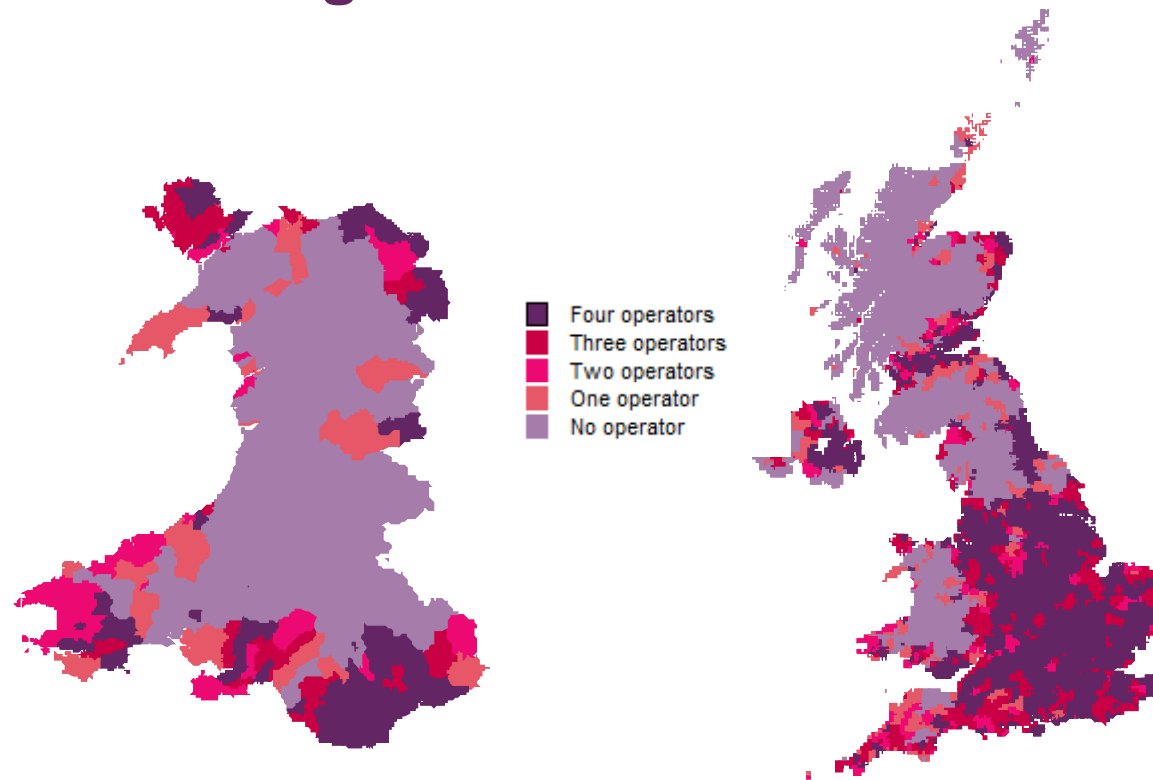
3G mobile phone geographic coverage by land mass (90%) – by number of operators



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Figures show the percentage of land mass (based on km² units) where at least one operator had at least 90% 3G area coverage

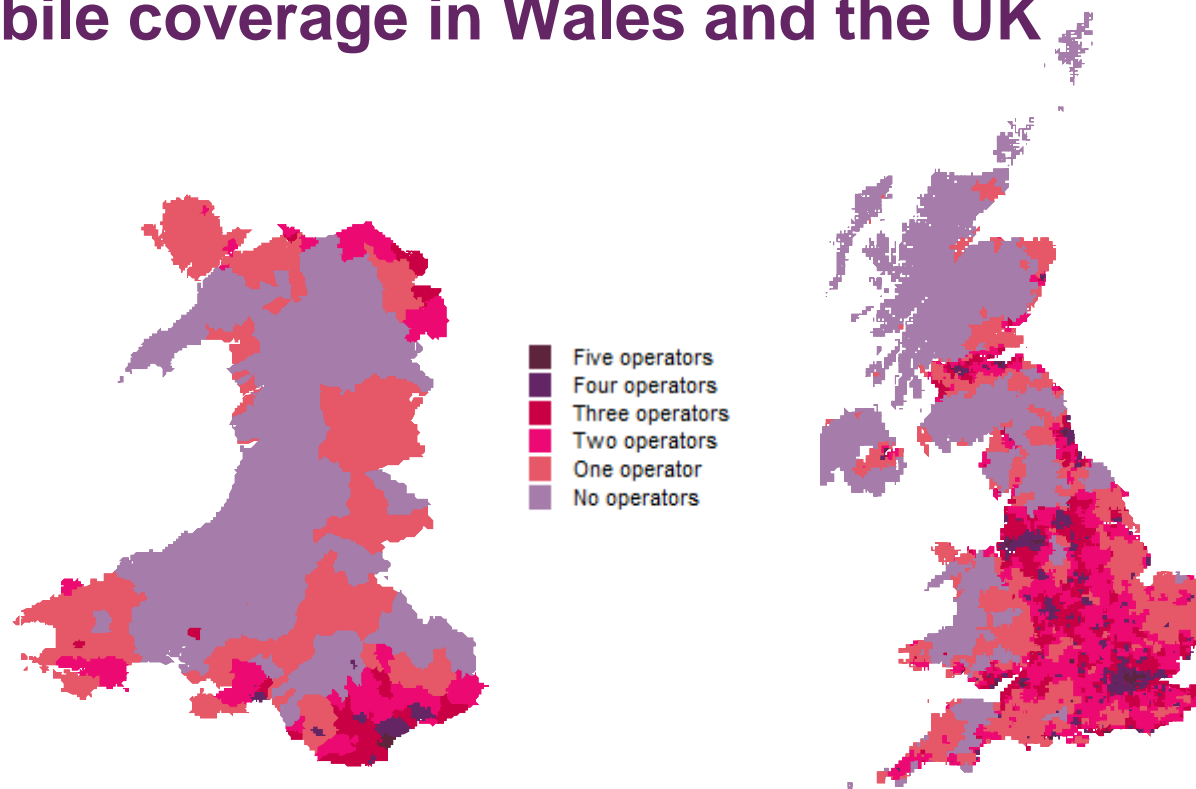
2G mobile coverage in Wales and the UK



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Map shows the number of 2G operators with at least 90% geographic coverage by postcode area; not directly comparable to that published in the 2011 report

3G mobile coverage in Wales and the UK



Source: Ofcom/ GSM Association / Europa Technologies; Q2 2011

Note: Map shows the number of 3G operators with at least 90% geographic coverage by postcode area; not directly comparable to that published in the 2011 report

Take-up of communications services, 2011

| | UK | Wales | England | Scotland | N Ireland | Wales urban | Wales rural |
|-----------------------------------|------------|-------|---------|----------|-----------|-------------|-------------|
| Individual | | | | | | | |
| Voice telephony Fixed Line | 85% | 80% | 85% | 80% | 84% | 78% | 85% |
| Mobile | 91% | 87% | 92% | 86% | 92% | 88% | 85% |
| Internet PC | 77% | 74% | 78% | 65% | 78% | 75% | 70% |
| Total Internet | 76% | 72% | 78% | 64% | 76% | 72% | 68% |
| Broadband (fixed and mobile) | 74% | 71% | 76% | 61% | 75% | 72% | 67% |
| Fixed Broadband | 67% | 65% | 68% | 57% | 67% | 65% | 62% |
| Mobile Broadband | 17% | 16% | 18% | 9% | 13% | 18% | 12% |

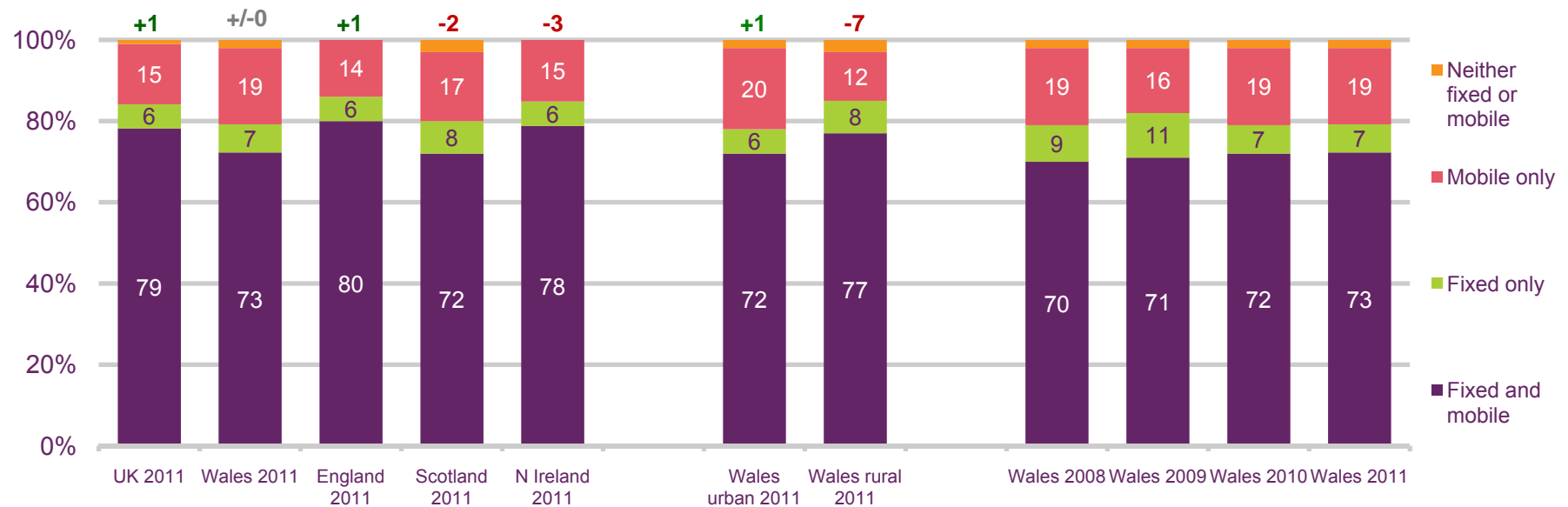
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QE9. Which of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

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural)

Cross-ownership of household telephony services

Figure above bar shows % point change in mobile only from Q1 2010



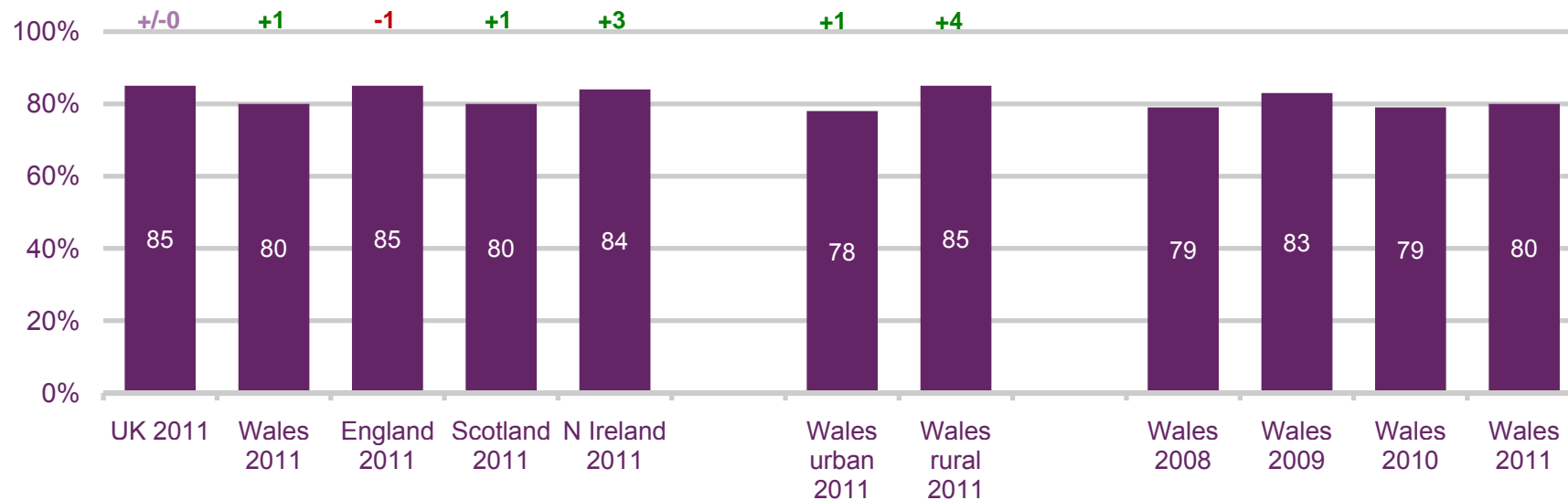
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Fixed line take-up

Figure above bar shows % point change in fixed line take-up from Q1 2010



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

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Mobile take-up

Figure above bar shows % point change in use of mobile phones from Q1 2010



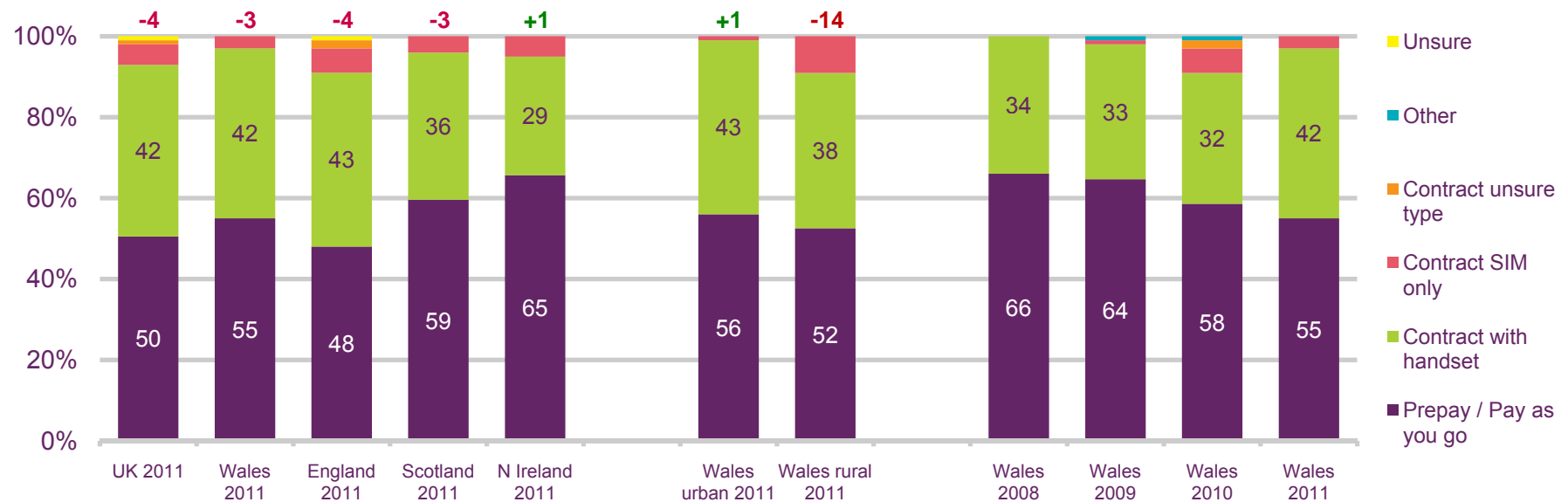
QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Type of mobile subscription

Figure above bar shows % point change in prepay from Q1 2010

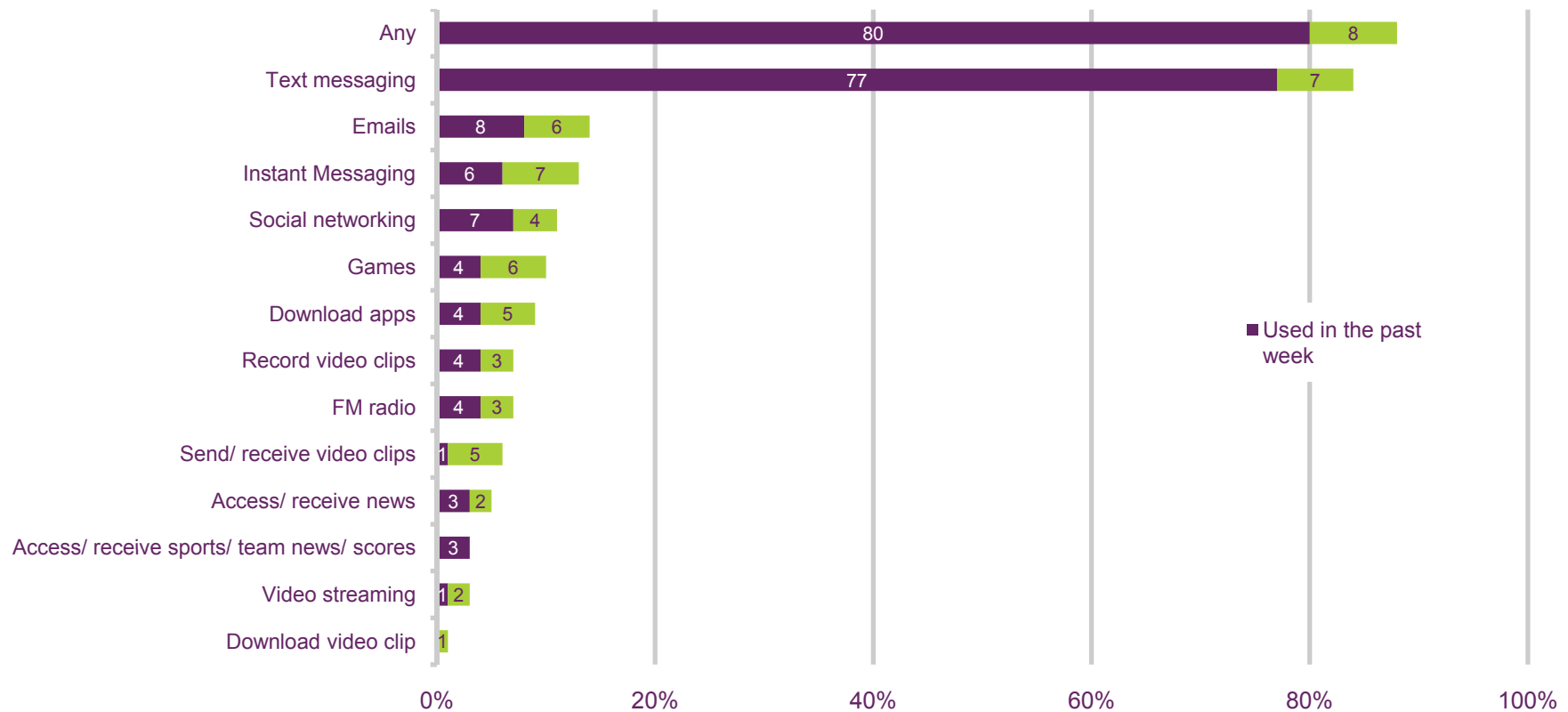


QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 416 Wales, 1786 England, 425 Scotland, 464 Northern Ireland, 208 Wales urban, 208 Wales rural, 656 Wales 2008, 836 Wales 2009, 923 Wales 2010, 416 Wales 2011)

Use of mobile applications among mobile users in Wales



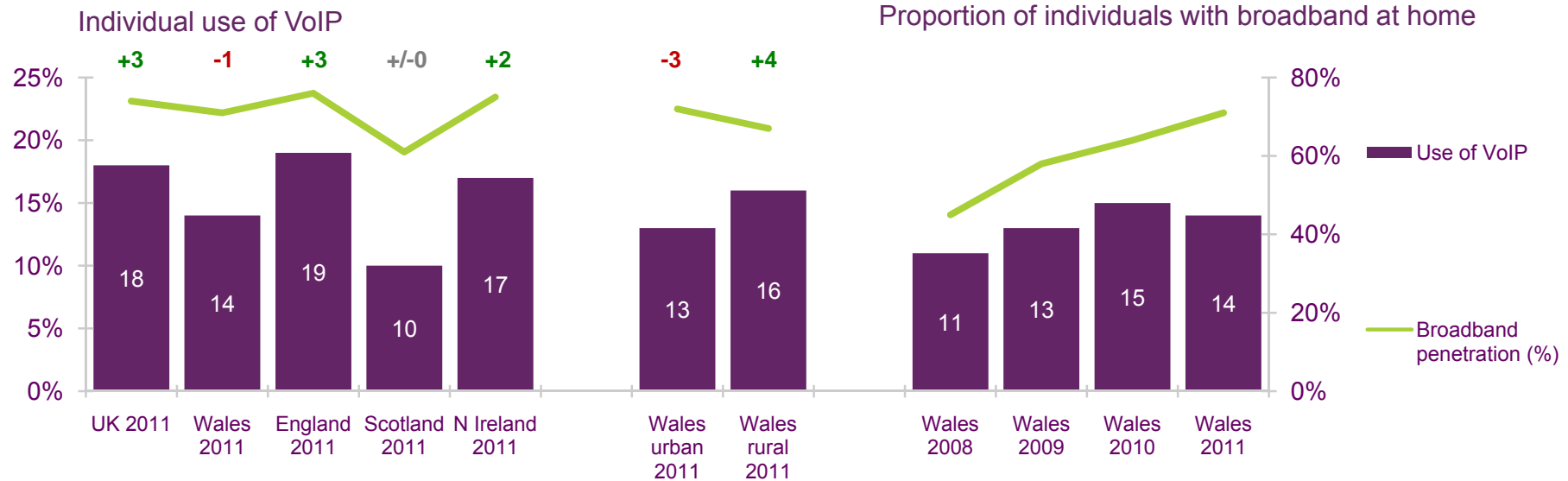
QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n= 416 Wales 2011)

Individual use of Voice over IP

Figure above bar shows % point change in current use of VoIP from Q1 2010

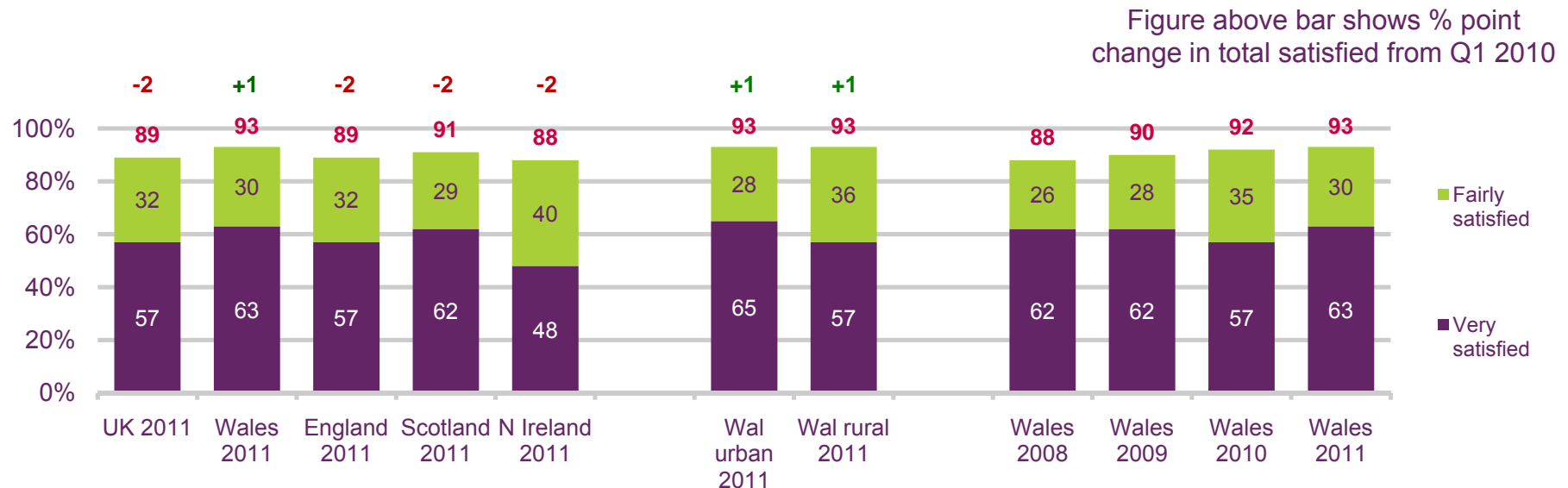


QE29. Before now, were you aware that you could make voice calls using the internet?/ QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Overall satisfaction with fixed line services



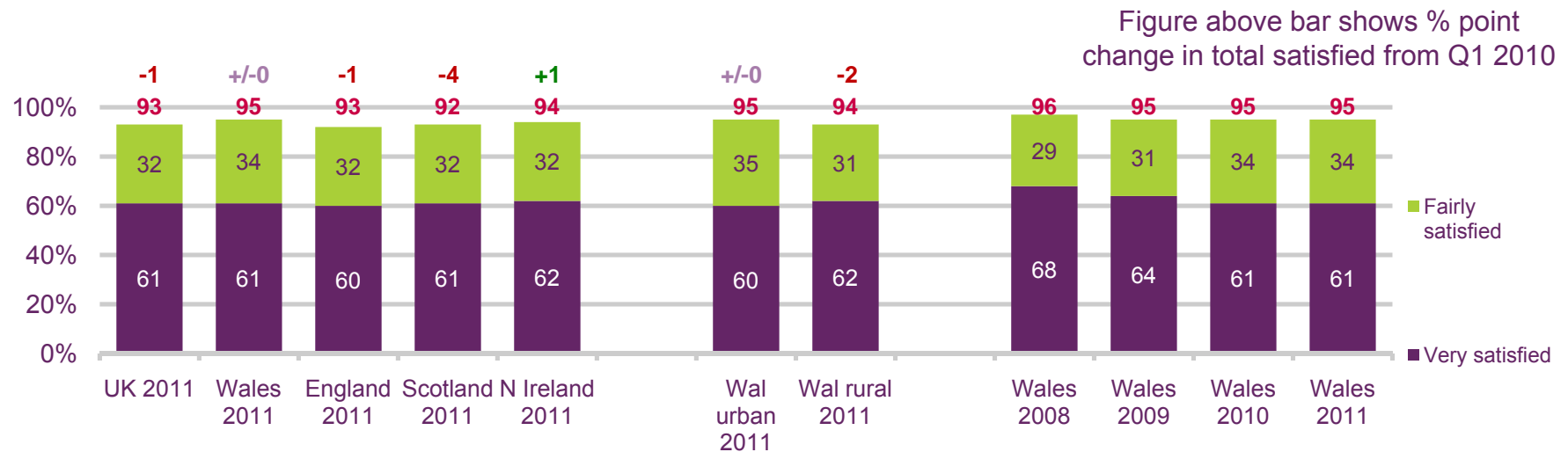
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

B Base: Adults aged 16+ with a landline phone at home (n = 2943 UK, 402 Wales, 1707 England, 400 Scotland, 434 Northern Ireland, 189 Wales urban, 213 Wales rural, 643 Wales 2008, 818 Wales 2009, 874 Wales 2010, 402 Wales 2011)

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



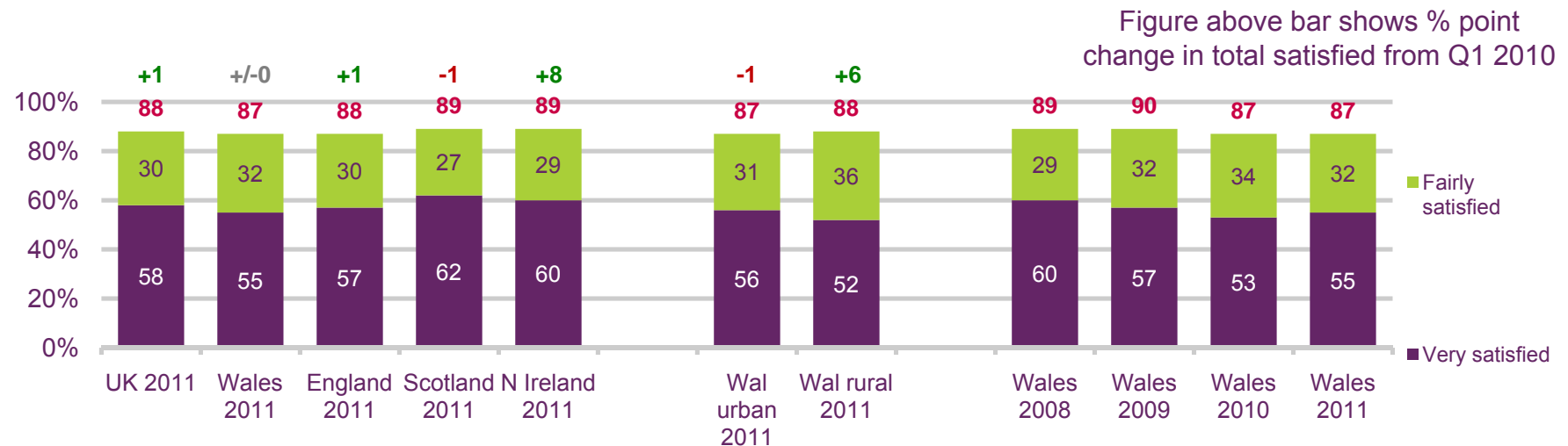
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 416 Wales, 1786 England, 425 Scotland, 464 Northern Ireland, 208 Wales urban, 208 Wales rural, 645 Wales 2008, 836 Wales 2009, 923 Wales 2010, 416 Wales 2011)

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 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 416 Wales, 1786 England, 425 Scotland, 464 Northern Ireland, 208 Wales urban, 208 Wales rural, 645 Wales 2008, 836 Wales 2009, 923 Wales 2010, 416 Wales 2011)

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

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 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2243 UK, 303 Wales, 1311 England, 294 Scotland, 335 Northern Ireland, 155 Wales urban, 148 Wales rural, 386 Wales 2008, 527 Wales 2009, 604 Wales 2010, 303 Wales 2011)

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



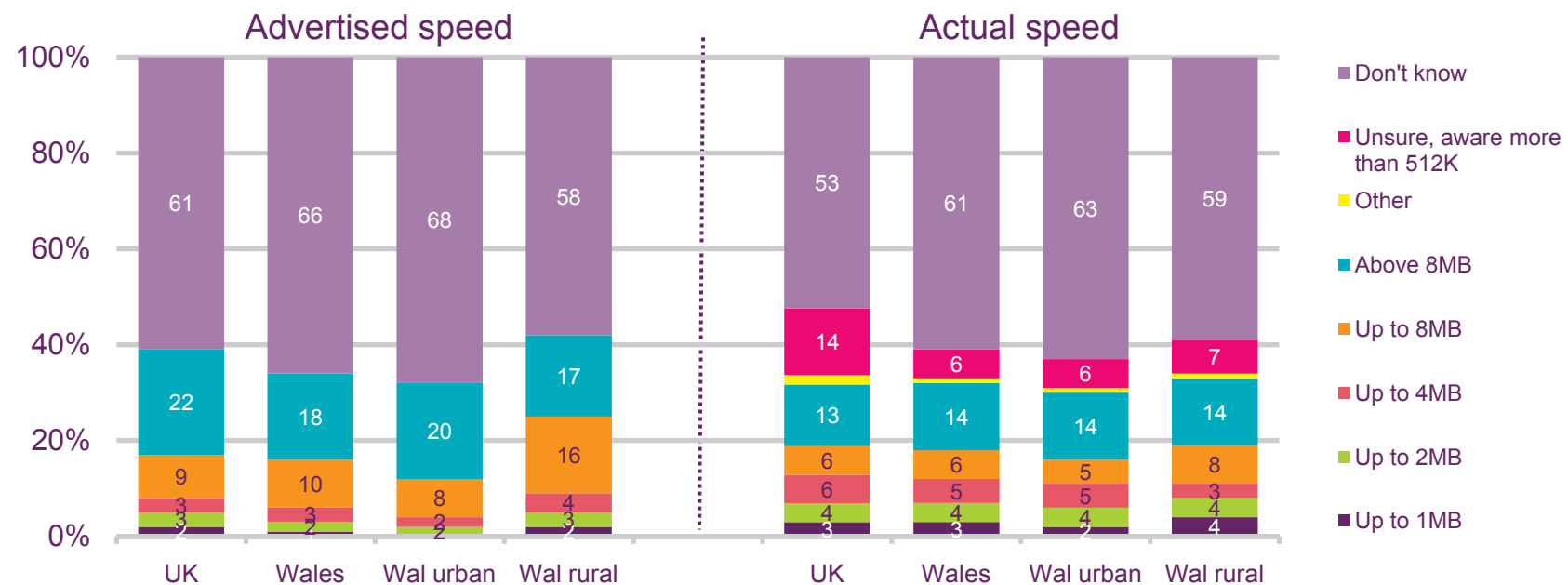
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2243 UK, 303 Wales, 1311 England, 294 Scotland, 335 Northern Ireland, 155 Wales urban, 148 Wales rural, 386 Wales 2008, 527 Wales 2009, 604 Wales 2010, 303 Wales 2011)

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 Wales



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 2011

Base: Adults aged 16+ with broadband as their main connection at home (n = 2481 UK, 328 Wales, 169 Wales urban, 159 Wales rural)