



The Communications Market 2013

1 The market in context

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1.1 Introduction and structure

1.1.1 Introduction

This introductory section of the Communications Market Report 2013 is divided into seven sections:

- **Key market trends** (Section 1.3, page 21)

The section summarises developments in the UK's communications sectors during 2012 and 2013. It focuses on services' availability, take-up and industry revenues, as well as covering consumers' use of devices and household spending on communications services.

- **Media multi-tasking** (Section 1.4 page 33)

This section looks at what other devices people are using while watching TV, and whether they are interacting with or communicating about the TV content on these devices (*media meshing*) or simply using other devices (*media stacking*).

- **The rising use of tablet computers** (Section 1.5, page 51)

Tablet ownership more than doubled between 2012 and 2013, and a quarter (24%) of households now own at least one of these devices. This section explores the impact these devices are having on use of other services and devices.

- **Web and text-based communications** (Section 1.6, page 65)

With the growth in take-up and use of a range of digital communications services, this research looks at UK consumers' preferences for, and use of, different ways of communicating in different circumstances. The research found that digital communication methods are now widely used alongside, and in some cases are usurping, traditional methods.

- **TV and internet use among ethnic minority groups** (Section 1.7, page 77)

The ethnic minority group (EMG) population of the UK is made up of many very different ethnic groups. This section uses consumer research to look at a sample of the largest ethnic minority groups in the UK and assesses how these groups are using TV and internet services.

- **UK cities' communications markets** (Section 1.8, page 89)

This section outlines a range of key findings for communications markets in the UK's cities, looking at availability and take-up of telecoms services.

- **News consumption in the UK** (Section 1.9, page 105)

This section examines patterns of news consumption in the UK, among different groups of the population. It also provides an overview of local news media use, to see which types of local media people are using, how important they find these sources and how satisfied they are with them.

1.2 Fast facts

Digital TV	
Proportion of UK homes with digital TV Q1 2013	97%
Minutes spent watching TV per day (person aged 4+)	241 (4 hours)
Proportion of homes with a DVR	53%
Radio	
Proportion of radio listeners with a DAB radio in their household	44%
Proportion of listener hours through a digital platform (DAB, online DTV)	34%
Minutes spent listening to radio per day (among radio listeners)	170 (2 hours, 50 minutes)
Number of local radio stations broadcasting on analogue (excluding community stations)	338
Number of community radio stations currently on air	207
Number of national radio stations (analogue and DAB)	27
Internet	
Total household internet take-up	80%
Number of fixed residential broadband connections	21.7 million (Dec 2012)
Proportion of adults with broadband (fixed and mobile)	75%
Proportion of adults with mobile broadband	5%
Superfast broadband take-up (proportion of non-corporate connections)	17.5%
Average actual broadband speed	12.0Mbit/s (Nov 2012)
Proportion of homes with a PC or Laptop	79%
Proportion of people who use their mobile to access the internet	49%
Number of mobile broadband subscriptions (dongles/PC datacard)	4.917m (Dec 2012)
Fixed and mobile telephony	
Number of residential fixed landlines	24.4 million (Dec 2012)
Number of fixed landlines in the UK, including ISDN channels	33.1 million (Dec 2012)
Proportion of adults who personally own/use a mobile phone	92%
Proportion of adults with a smartphone	51%
Proportion of adults who live in a mobile-only home	15%
Proportion of prepay mobile subscriptions	39%
Number of text messages sent per mobile subscriber per month	153 (2012)
Post	
Addressed mail volume in 2012	15.7bn items
Approximate no. items received by residential consumers per week	8.4
Approximate no. items sent by residential consumers per month	7.7

1.3 Key market trends

1.3.1 UK communications market revenue

Postal sector sees largest rise in communications industry revenues in 2012

Total UK communications revenues (comprised of those generated by telecoms, TV, radio and post services) decreased for the fourth successive year in 2012, falling by £0.1bn (0.2%) to £59.5bn.

Telecoms revenues fell by £0.7bn to £38.8bn during the year, as a £0.3bn increase in retail fixed broadband revenues, a £0.2bn increase in retail mobile voice and data service revenues and a rise of less than £0.1bn in corporate data service revenues were offset by a £0.3bn fall in retail fixed call and access revenues and declining wholesale revenues.

The UK television industry generated revenue of £12.3bn in 2012, an increase of 0.8% on 2011, while total UK radio industry revenue stood at £1.2bn in 2012, up by 2.7% on the previous year.

Ofcom's new regulatory framework for the postal sector took effect in March 2012. The changes granted greater commercial freedom to Royal Mail to allow it to react to structural decline in the mail market while also imposing a number of key regulatory safeguards. In 2012, addressed mail volumes continued to decline, falling by 5.8% to 15.7 billion items. Price increases implemented by Royal Mail meant that mail revenue increased for the second year in a row, reaching £7.2bn in 2012.

Figure 1.1 Communications industry revenue – telecoms, TV, radio, post



Source: Ofcom/ operators. Note: Includes licence fee allocation for radio and TV, Figures are in nominal terms

1.3.2 Availability of communications services

NGA broadband is now available to almost three-quarters of the UK

ADSL had the highest availability of the technologies used to deliver fixed broadband in the UK, and at the end of 2012 almost all UK homes (over 99.9%) were connected to an ADSL-

enabled BT exchange.¹ Figure 1.2 shows that availability of broadband via local loop unbundling (LLU) rose to 94% of UK homes being connected to an LLU-enabled BT local exchange² in 2012, a two percentage point increase compared to a year previously.

Ofcom's estimates show that approaching half (48%) of UK homes were passed by Virgin Media's cable broadband network in June 2013. We estimate that 56% of UK homes were able to receive BT Openreach/ Kcom's fibre broadband services by June 2013, although access to this service varied significantly across the nations, being highest in Northern Ireland, where 93% of homes had access, compared to a quarter of homes (25%) in Scotland. Superfast broadband services are provided over NGA networks, which in June 2013 served almost three-quarters of postcodes in the UK (73%) – an eight percentage point rise on the previous year.

In terms of mobile phone coverage, across the UK, we estimate that 99.6% of premises had outdoor 2G mobile coverage from at least one operator in June 2013 (3G coverage was slightly lower, with 99.1% outdoor coverage from at least one operator). 3G coverage was lowest in Scotland, where 96.6% of premises had outdoor 3G coverage from at least one operator, in June 2013

With the UK's switchover to digital television completed in October 2012, 98.5% of households are able to receive the PSB channels via digital terrestrial television (DTT). The BBC DAB network provides coverage to 94.3% of UK households, while the DAB commercial network, Digital One, reached 85% of the UK population.

¹ Note: some people in these areas may not be able to receive ADSL broadband services, or may only be able to do so at very slow speeds, as a result of the long length or poor quality of the copper telephone line from their premises to the local exchange.

² Local loop unbundling (LLU) involves an alternative operator placing its own equipment in the incumbent's local exchange, and consumers living in LLU-enabled exchange areas are likely to have a greater choice of ADSL broadband services and, typically, access to lower-cost (particularly bundled) services.

Figure 1.2 Digital communications services availability

Platform	UK 2012	UK 2011	UK change	England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0pp	100%	100%	100%	100%
2G mobile ¹	99.6%	99.7%	-0.1pp	99.8%	99.3%	98.8%	98.5%
3G mobile ²	99.1%	99.1%	0pp	99.5%	96.6%	97.7%	97.4%
Virgin Media cable broadband ³	48%	-	-	51%	38%	22%	28%
LLU ADSL broadband ⁴	94%	92%	+3pp	95%	87%	92%	85%
BT Openreach/ Kcom fibre b'band ⁵	56%	n/a	n/a	59%	25%	41%	93%
NGA broadband ⁶	73%	65%	+8pp	76%	52%	48%	95%
Digital satellite TV	98%	98%	0pp	-	-	-	-
Digital terrestrial TV ⁷	99%	-	-	99%	99%	98%	97%
DAB BBC Network ⁸	94.3%	92%	+2.3pp	95.5%	90.9%	85.9%	85.4%
DAB commercial network (Digital One) ⁹	85%	85%	0pp	90%	75%	60%	-

Sources: Ofcom and operators:

1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator, June 2013

2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator, June 2013

3. Proportion of homes in postcodes served by Virgin Media's cable broadband network, June 2013

4. Proportion of homes connected to an LLU-enabled BT local exchange area, December 2012

5. Proportion of homes in postcodes served by BT Openreach/ KCom's fibre broadband networks, June 2013

6. Proportion of homes in postcodes served by NGA networks, June 2013

7. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom)

8. BBC National DAB network coverage as of April 2012

<http://stakeholders.ofcom.org.uk/broadcasting/radio/coverage/dab-coverage/>

9. Digital One coverage (indoor proportional method – households), April 2012

<http://stakeholders.ofcom.org.uk/broadcasting/radio/coverage/dab-coverage/>

1.3.3 Take-up of services and devices

Tablets and smartphones continue to see rapid growth in take-up

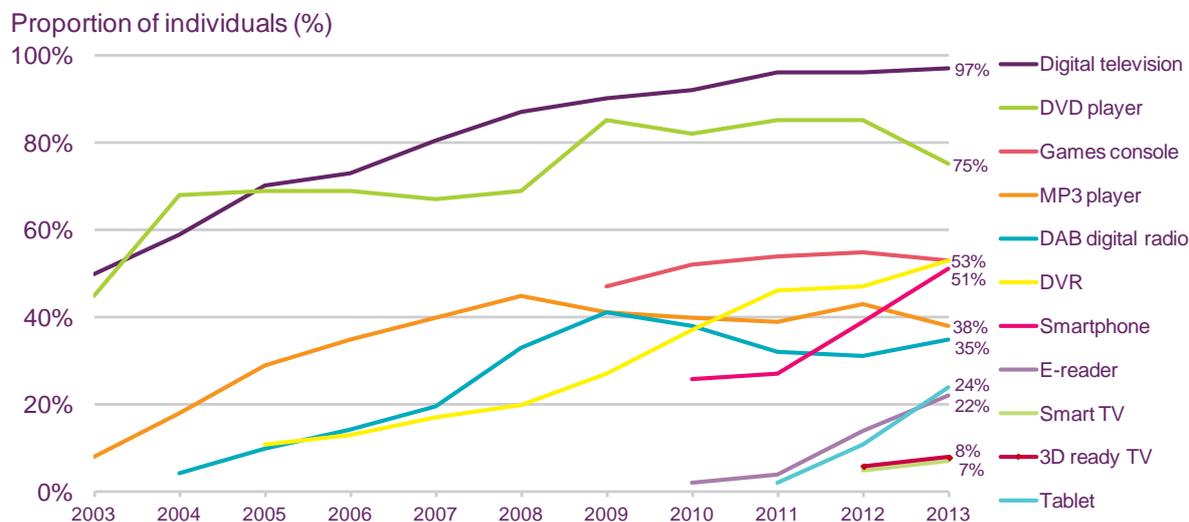
Figure 1.3 shows take-up of a range of communications and audio-visual devices over the past decade. Take-up of smartphones has continued to increase rapidly over the past year, with half of all adults now claiming to own one (51%) – equivalent to 56% of mobile users. The proportion of consumers with one of these devices has doubled over the past two years (take-up in 2011 was 27%). However, as discussed in section 4, take-up varies significantly by age; just over three-quarters of respondents (77%) aged 16-24 reported having a smartphone, compared to 11% of those aged 65-74 and 2% of those aged 75+.

Household take-up of tablet computers (such as the iPad or Google Nexus) has more than doubled over the past year, rising from 11% in Q1 2012 to 24% in Q1 2013. A majority of this growth was over the Christmas period, with take-up rising eight percentage points between Q4 2012 and Q1 2013.

Over half of all households now own a digital video recorder (DVR), while one in five (22%) have an e-reader. Smart TVs have shown a modest increase, with 7% of homes now claiming to have a TV with an integrated internet connection.

Conversely, take-up of slightly older technologies, such as DVD players and standalone MP3 players, has declined over the past year, with 75% and 38% of households having these devices respectively.

Figure 1.3 Household take-up of digital communications/ AV devices, 2003-2013



Source: Ofcom technology tracker

Base: All adults aged 16+ (2013 n=3750). Data from Q1 of each year

Note: The question wording for DVD player and DVR was changed in Q1 2009 so data are not directly comparable with previous years

Half of consumers now report accessing the internet on their mobile

While the proportion of households with access to the internet remains at 80% (as in Q1 2012), the ways people are connecting continues to change. Half of respondents (49%) said they personally use their mobile phone to access the internet (up from 36% in Q1 2012), driven by growth in the smartphone market. Almost all UK adults who have mobile phone internet access also have access via fixed broadband. Only 4% of UK adults reported that their household's only means of internet access was a smartphone.

Conversely, take-up of mobile broadband via a dongle (or built-in connectivity in a laptop, netbook or tablet) has more than halved over the past year, with 5% of households reporting to use this service compared to 13% a year ago.

Total broadband take-up remained stable and at Q1 2013 stood at 75% of UK households. This figure includes households with fixed and/or mobile broadband connections, but excludes access via a mobile handset.

The proportion of households with fixed telephony and mobile telephony also remained stable, at 84% and 94% respectively, with 15% being 'mobile-only' homes. Personal use of a mobile phone stood at 92% in Q1 2013.

Figure 1.4 Household take-up of communications services



QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the internet/world wide web at home (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the internet at home? NB mobile data user is defined as consumers using either mobile broadband or internet on their mobile phone

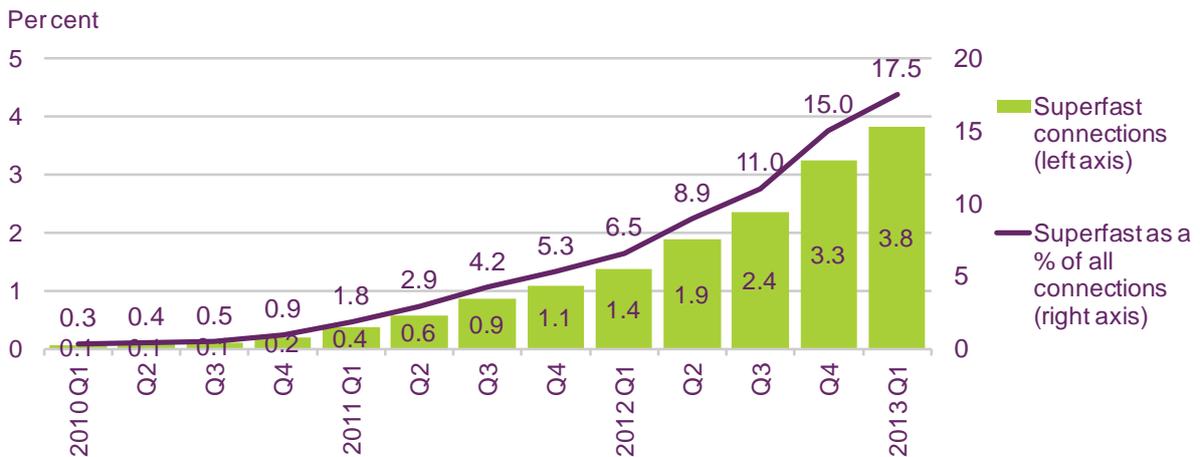
Source: Ofcom research, data as at Q1 of each year

Base: All adults aged 16+

Superfast connections almost triple over the past year

Figure 1.5 shows that at the end of March 2013 there were around 3.8 million UK residential and small to medium sized enterprise (SME) superfast broadband connections, two and a half times more than there had been a year previously (1.4 million). Over the same period the proportion of all non-corporate broadband connections that were superfast almost tripled, increasing to 17.5%, although we expect this growth to slow as Virgin Media has now completed its ‘double-speeds’ upgrade programme, which doubled the speeds provided by most of its cable broadband connections.

Figure 1.5 Take-up of superfast broadband services



Source: Ofcom / operator data

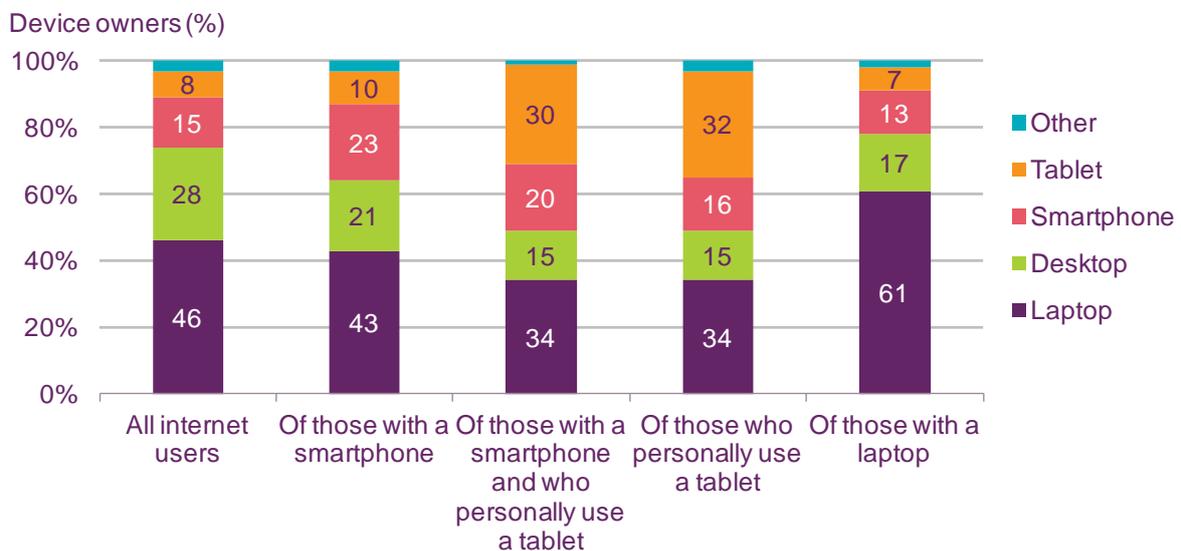
Note: Includes estimates where Ofcom does not receive data from operators

Half of all internet users say their laptop is the most important device used to connect to the web

When respondents were asked which is their most important device for connecting to the internet (at home or elsewhere), almost half (46%) of internet users chose their laptop. The laptop was the most popular response, followed by the desktop PC, cited by 28% of respondents.

However, newer devices such as smartphones and tablets are having an impact on consumers' preferences. Among smartphone users, 23% cited this as their most important device for connecting to the internet, although laptops remained the most popular response (43%). Among tablet owners, the preference for laptops drops significantly, with similar proportions citing laptops and tablets as their most important device for connecting to the internet (34% and 32% respectively).

Figure 1.6 Most important device for connecting to the internet



Source: Ofcom research, Q1 2013

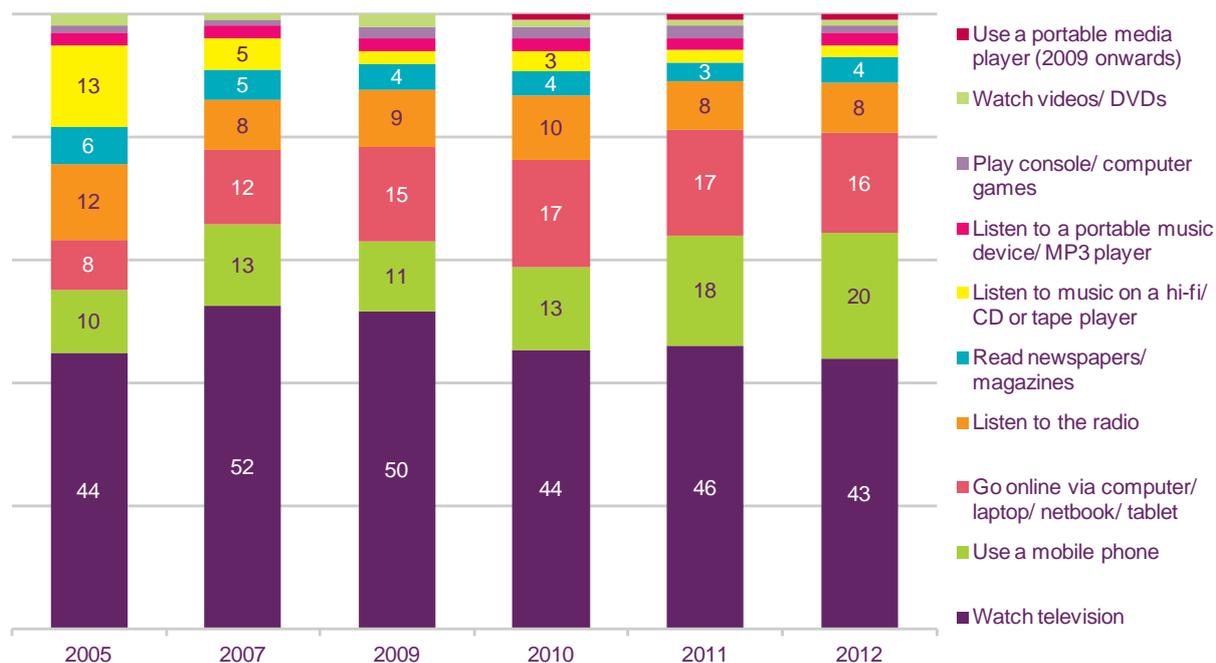
Question: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "netbook", "games console", "other device", "none" and "don't know".

One in five adults say using their mobile phone would be the media activity they would miss the most

When respondents to Ofcom's Media Literacy Tracker were asked which medium they would miss the most if it were taken away, television continues to be the most popular response, with 43% of UK adults choosing this option in 2012. However, there have been some notable changes over time. A fifth (20%) of UK adults now say they would miss their mobile the most – double the proportion giving this answer in 2005. Similarly, those citing going online via a computer (PC/ laptop/ netbook or tablet) has also doubled, from 8% in 2005 to 16% of UK adults in 2012.

Less than one in ten adults cited listening to the radio (8%) or reading magazines or newspapers (4%).

Figure 1.7 Most-missed media activity



A2 – Which one of these would you miss doing the most? (Prompted responses, single coded)

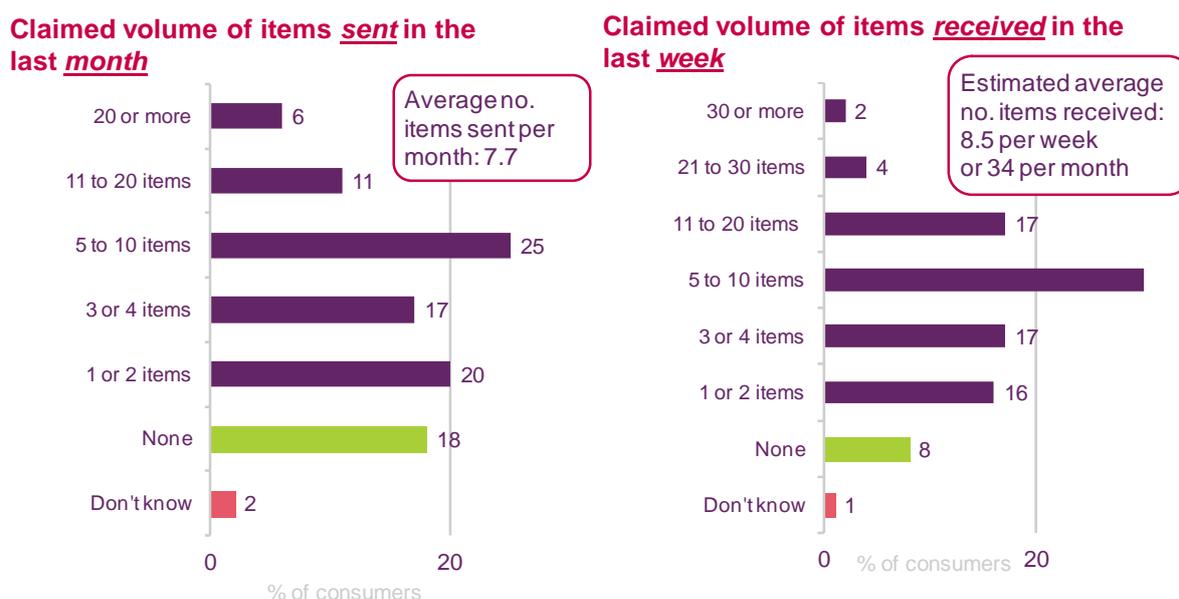
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 1824 in 2009, 2117 in 2010, 1823 in 2011, 1805 in 2012). Significance testing shows any change between 2011 and 2012

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012

A fifth of consumers claimed to send no items of mail in the past month

Ofcom's Residential Post Tracker shows that adults in the UK claim to receive an average of 8.5 items of post – including letters, cards and parcels – in an average *week* (Figure 1.8). This compares to an average of approximately 7.7 letters, cards or parcels sent in an average *month*. This difference is due to the fact that the majority of UK mail is sent by businesses to households. Nearly one in five consumers (18%) reported sending no items of mail in the past month.

Figure 1.8 Approximate number of items sent and received by post



Source: Ofcom Residential Post Tracker Q3 2012-Q1 2013. Base: All respondents (n= 3671). Question: 'Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month? This should exclude any items you send from home in connection with running a business, if you do this from home.' Question: 'Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week?.'

1.3.4 Time spent on communications services

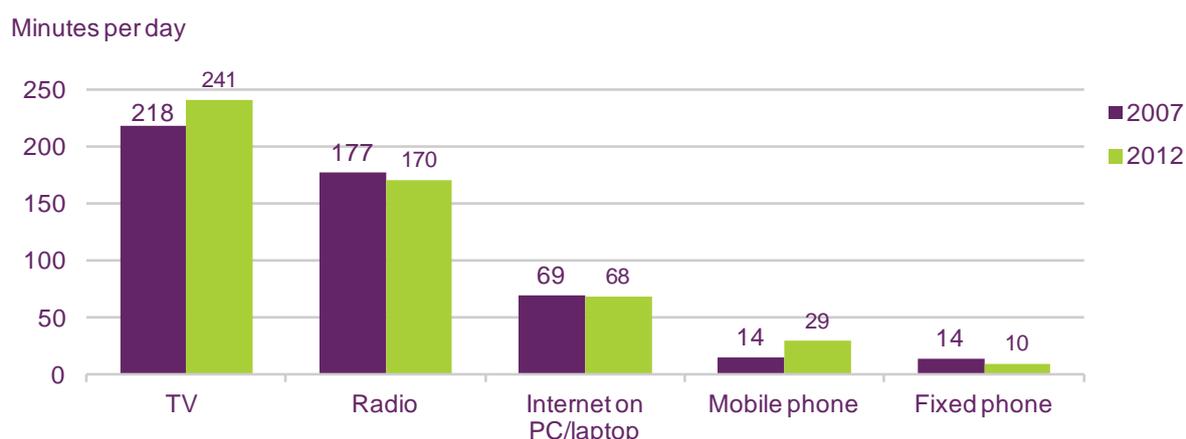
Figure 1.9 shows how much time people spend consuming different types of media in a typical day.

Time spent watching television has remained resilient at an average 241 minutes per day in 2012 for all people aged 4+; equivalent to four hours per person, although section 2.3.3 shows that this varies significantly by age. While similar to the 2012 figures, this is a 23 minute increase on the average amount of time spent watching television in 2007. Television represents the greatest amount of consumption of the communications services measured. Time spent listening to radio accounted for 170 minutes per day among adults aged 15 and over in 2012, which represents a decrease of seven minutes compared to the same period in 2007.

The amount of time spent using a PC/laptop to access the internet at home and work has remained stable since 2007, at 68 minutes per internet user per day. It is important to note this is unlikely to account for the total amount of time spent online, as consumers are increasingly using devices other than a PC or laptop to access the internet. Section 4.2 explores consumers' increasing use of devices such as smartphones and tablet PCs to access the internet.

While the amount of time spent using a mobile phone to make or receive voice calls, send messages or surf the internet more than doubled; from 14 minutes per day to 29 minutes per day between 2007 and 2012, the average time spent using a fixed phone to make or receive calls fell by 29% to 10 minutes per day over the same period.

Figure 1.9 Average time spent using communications services per day



Source: Ofcom / BARB / RAJAR / comScore MMX, home and work panel/ operator data/ Strategy Analytics

Note: Daily figures for mobile voice and data, and fixed voice, were calculated from monthly data on the assumption that there are 30.4 days in the average month; for the internet consumption figures relate to monthly averages of Jan-Dec for each year; the estimated internet consumption on a PC/laptop figures include the use of online applications such as streaming media and includes use at home and work; mobile telephony figures are Ofcom estimates based on message volume data and Ofcom Digital Day research conducted in 2010

Radio listening minutes are based on an average among radio listeners

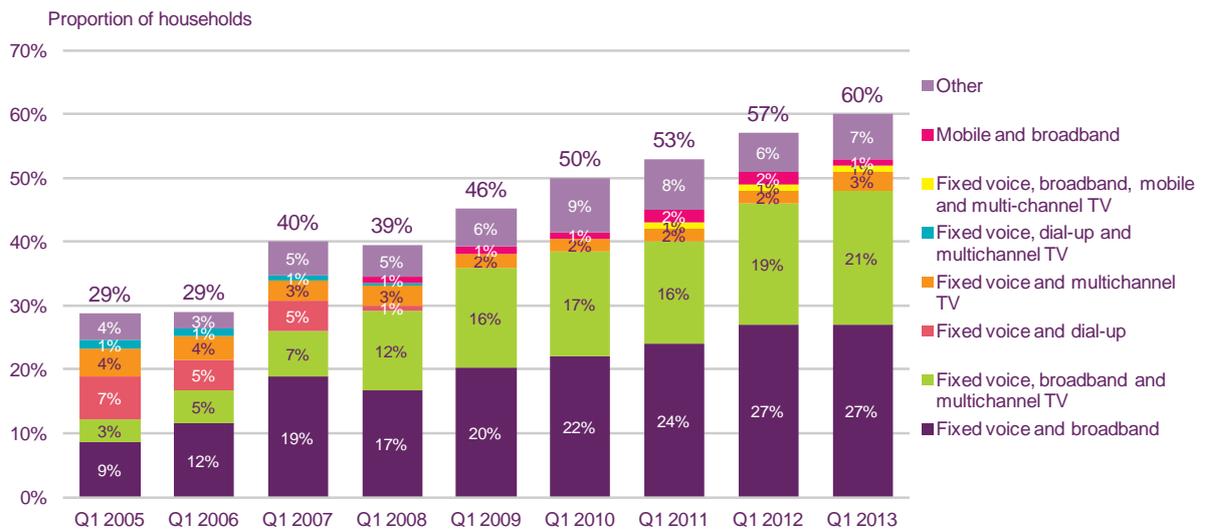
1.3.5 Purchasing of communications services in a bundle

Six in ten households now purchase communications services in a bundle

Six in ten consumers bought at least two of their communications services together in a bundle in Q1 2013, with a double-play package of landline and broadband being the most popular, taken by 27% of households. Take-up of bundles varied by socio-economic group, with 70% of those in AB households having at least one bundle, compared to 45% of those in DE households.

A fifth of homes (21%) reported having a triple-play bundle of fixed voice, broadband and multichannel TV in Q1 2013, up by two percentage points on the same period last year.

Figure 1.10 Take-up of bundled services



Source: Ofcom technology tracker

Base: All adults aged 16+ (2013 n=3750)

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

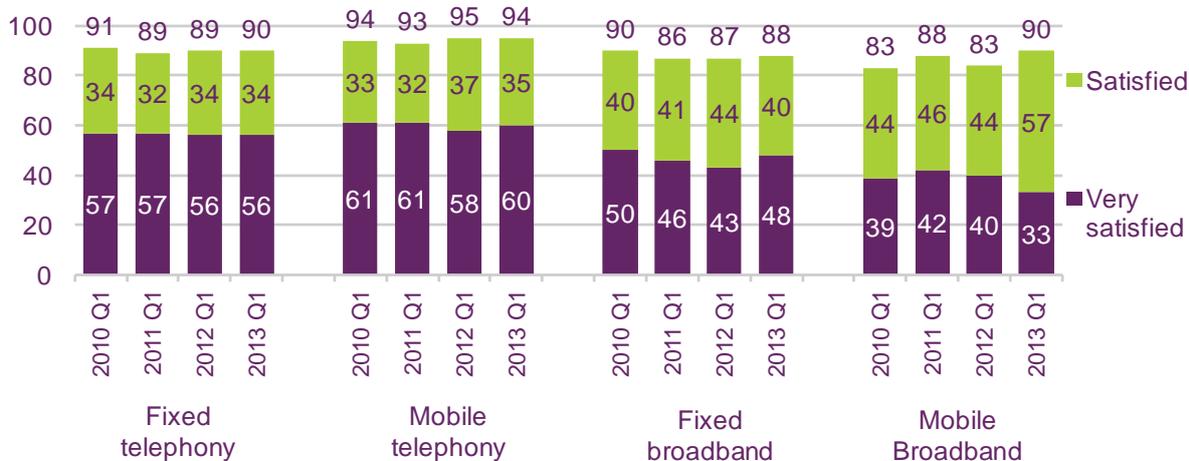
1.3.6 Satisfaction with communications services

Satisfaction levels remain high for telecoms services

For most communications services, consumer satisfaction remained the same year on year. In Q1 2013, 94% of mobile phone owners were satisfied with their mobile service – the highest results across the services measured. Nine in ten (90%) were satisfied with their fixed-line telephone service, and a similar proportion (88%) with their fixed broadband. Satisfaction levels for mobile broadband returned to 2011 levels, with nine in ten consumers saying they were ‘very’ or ‘fairly’ satisfied.

Figure 1.11 Overall satisfaction with communications services

Proportion of users of service (per cent)



Source: Ofcom technology tracker

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

1.3.7 Household spend on communications services

Household spend on communication services fell in real terms from £122.42 in 2007 to £113.51 in 2012, representing a monthly saving of £8.91, or £106.92 per year.

Average monthly household spend on telecoms services rose to £68.34 in 2012, a £0.65 a month rise in real terms. This is a result of increasing mobile spend (with a greater proportion of consumers having a smartphone and using mobile data) and spend on fixed broadband services rising with an increasing number of connections and households taking up superfast services.

Household spend on television fell by £0.50 since 2011, to £28.41.

Figure 1.12 Average household spend on communications services

£ per month (2012 prices)



Source: Ofcom / operators/ ONS

Notes: Adjusted for RPI. Historical telecoms figures have been re-stated, so are not comparable to figures quoted in previous reports.

1.4 Media multi-tasking

1.4.1 Introduction

With the continually expanding range of communications services and devices, consumers' focus of attention on any one particular activity or device is under pressure. People's attention is frequently divided as they switch from one activity to the next. Multi-tasking - conducting more than one activity at the same time - is becoming commonplace. This section of the report provides a look at some specific multi-tasking behaviours that we call 'media meshing' and 'media stacking'.

'Meshing' and 'stacking': definitions

For the purpose of this report, the definition of *media meshing* is conducting activities or communicating via other devices while watching television; these activities are related to the television programme being watched.

Media stacking describes doing activities on, or communicating via, other devices on issues not related to the television programme currently being watched.

Combined, they make up *media multi-tasking*.

1.4.2 Key points

- **Just over half (53%) of all UK adults are regular media multi-taskers i.e. they 'stack' or 'mesh' while watching TV weekly or more often.** One-quarter (25%) of all UK adults regularly engage in media-meshing (interacting or communicating about the TV content they are viewing) and around half (49%) are regularly media-stacking (conducting unrelated media tasks while watching TV). Twenty percent of UK adults claim to do both at least weekly.
- **Tablet owners significantly more likely than average to multi-task with other media while watching TV (81%).** Eighty-one per cent of tablet owners multi-task while watching the TV, this compares to 74% among smartphone owners. Tablet owners are 'meshing' significantly more than the UK population specifically looking online for programme and advertising information. Tablets also lend themselves to 'stacking' and play a significant role in these activities; particularly for email, internet browsing, general social networking, watching AV content and online shopping.

Media meshing

- **UK adults enjoy getting involved with the programmes they watch on a weekly basis, a quarter either communicating about or interacting with the programme directly.** Texting/messaging and making/receiving phone calls about programmes are the most common activities (17% and 16% respectively). In total, just under one-in-four (23%) UK adults have made direct communication with family and/or friends via texts or phone calls about a television programme they are watching.
- **Just over one in ten adults have ever looked online for information about a programme (12%) and have 'talked about' a programme using social networks (11%).** Participating directly with programmes is a less common activity with one-in-twelve (8%) UK adults claiming to have ever done this either direct (6%) or via a programme app (3%).

- **People who do ‘any’ media meshing are significantly more likely to be female, younger and from the ABC1 social group.** There are also more likely to be children in the household. Communicating with friends and family via text/instant message and using social networks to discuss programmes are particularly common activities among 16-34 year olds.
- **Media meshing is a frequent activity: just under half (47%) of ‘meshers’ claim to do so daily.** One-quarter (25%) claim to do so several times a day. An additional 25% are media meshing weekly.

Media stacking

- **Media stacking is not only more common than media meshing, but also more frequent.** Half (49%) of UK adults claim to conduct other activities while they are watching television on a weekly basis (compared to 25% who ‘media mesh’ on a weekly basis).
- **Internet browsing is the most common activity with over one-third of UK adults (36%) saying they have done this while watching television.** Communicating with others either via making/receiving phone calls (29%), sending/reading emails (24%), texting (23%) and social networking/tweeting (22%) are also common activities. Six per cent claim to watch content on a different device (6%) which ties into other data seen elsewhere in this report that shows that people in the same room are often engaged in different activities on different devices at the same time.
- **Men and women engage in media stacking to an equal degree.** People who do ‘any’ media stacking while watching television are significantly more likely to be younger and from the ABC1 social group. There are also more likely to be children in the household.

1.4.3 Media multi-tasking

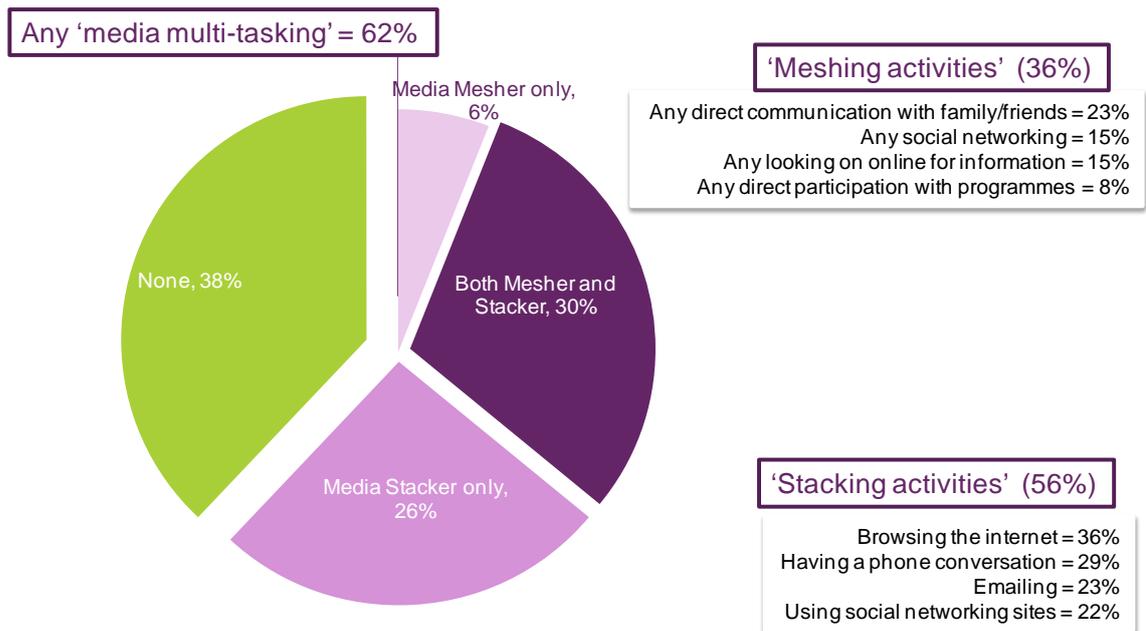
Six in ten (62%) UK adults have media multi-tasked while watching television.

Six in ten UK adults (62%) say they have media multi-tasked; i.e. used other devices while watching TV. Around a third (36%) of UK adults are interacting with, or communicating about, the programme they are watching (media meshing); the most popular activities are talking/texting/messaging friends and family about that programme.

Just over half (56%) say they are simply using other devices or conducting other activities while watching television programmes (media stacking), doing activities such as surfing the web, talking/texting/messaging, emailing and social networking.

In total, 30% of UK adults can be defined as *both* ‘stackers’ and ‘meshers’.

Figure 1.13 Media multi-taskers



Source: Ofcom omnibus survey 2013
Base: All UK adults (n = 4185)

Just over half (53%) of all UK adults are regular media multi-taskers, stacking or meshing weekly or more often. Their demographic profile skews towards younger, female and ABC1.

Regular media multi-taskers, who do any of these activities weekly or more often (53% of all UK adults) are classified as weekly media multi-taskers. A quarter (25%) of all UK adults regularly media-mesh and around half (49%) regularly media-stack, while 20% of UK adults claim to do both at least weekly.

Weekly media multi-taskers are significantly more likely to be female, younger and ABC1. They are also more likely to be working and have children in the household.

Figure 1.14 Demographic profile of weekly media multi-taskers



Source: Ofcom omnibus survey 2013
Base: All UK adults (4185)

1.4.4 Media meshing

UK adults enjoy getting involved with television programmes, with over one third (36%) either communicating about, or engaging directly with, the programme.

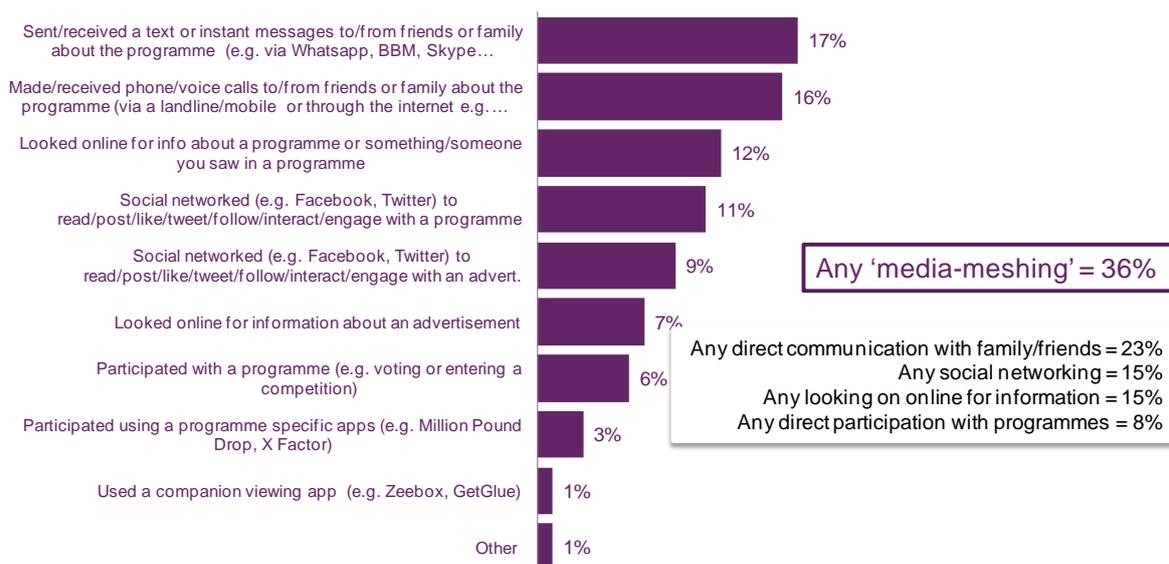
Thirty-six per cent of all UK adults claim to have ever ‘media meshed’ while watching television (engaged in activities on other devices directly related to what they are watching on television at the time). Texting/messaging and making/receiving phone calls about programmes are the most common activities (17% and 16% respectively) among people who watch TV. In total, just under one in four (23%) TV-viewing adults in the UK have made direct communication with family and/or friends via texts or phone calls about a television programme they are watching.

Looking online for information about a programme (12%) and social networking about a programme (11%) are slightly less common, with just over one in ten saying they had ever done either.

Participating directly with programmes is a less common activity; one in twelve (8%) claim to have ever done this, either direct (6%) or via a programme app (3%).

‘Companion apps’ have yet to make an impact, with only 1% of TV viewing adults in the UK claiming to have ever used these while watching television.

Figure 1.15 Media meshing activities conducted while watching TV



Source: Ofcom omnibus survey 2013

Q. Whilst watching a particular TV programme on a TV set in your home, which, if any, of the following activities have you ever done? All of these activities relate to the programme that you were watching at the time. Base: All who watch television (n = 3990)

People in Wales are more likely to media mesh than any other UK nation; talking and texting friends are the most common activities.

People in Wales are significantly more likely to media mesh than are people in other UK nations (52% ‘any activity’), with talking and texting with family and friends being the most prolific and significantly different activity (28%), when compared to the other nations. People in Northern Ireland are the least likely to media mesh (25% ‘any activity’).

Figure 1.16 Media meshing activities, by nation

	England	Scotland	Wales	Northern Ireland
Base	3332	338	205	125
Sent/received text/IM	16%	21%	24%	10%
Made/received phone/voice calls	15%	18%	28%	6%
Looked online for programme info	12%	12%	11%	5%
Used social network/tweeted about programme	11%	12%	13%	6%
Used social network/tweeted about an advert	9%	10%	8%	4%
Looked online for info about an advert	7%	6%	8%	1%
Participated with a programme	8%	11%	12%	9%
Used a companion viewing app	1%	1%	1%	-
ANY MESHING ACTIVITY	37%	41%	52%	25%

Source: Ofcom omnibus survey 2013

Q. Whilst watching a particular TV programme on a TV set in your home, which, if any, of the following activities have you ever done? All of these activities relate to the programme that you were watching at the time. Base: All who watch television (n = 3990)

Communicating with friends and family via text/instant messaging, and using social networks to discuss programmes, are common activities among 16-34 year olds.

When looking at specific activities, texting/instant messaging and social networking are significantly more prevalent among 16-34 year olds. Texting and instant messaging are also more common among females. ABC1s are significantly more likely than C2DEs to look online for information about programmes and adverts.

Figure 1.17 Demographic profile of media meshers, by activity

	Any	Texting or instant messaging about programme	Phone calls about programme	Any looking online for info (programme or advert)	Any using Social network to engage (programme or advert)	Any participation with programme e.g. voting, competitions
Base	1494	644	613	591	605	326
Male	45%	40%	46%	50%	44%	36%
Female	55%	60%	54%	50%	56%	64%
16-34	43%	52%	39%	44%	64%	35%
35-54	35%	34%	34%	38%	32%	43%
55+	22%	14%	27%	18%	4%	22%
ABC1	55%	57%	52%	67%	55%	59%
C2DE	45%	43%	48%	33%	45%	41%
Working	58%	59%	53%	64%	61%	60%
Not working	42%	41%	47%	36%	39%	40%

Source: Ofcom omnibus survey 2013

Q. Whilst watching a particular TV programme on a TV set in your home, which, if any, of the following activities have you ever done? All of these activities relate to the programme that you were watching at the time. Base: All who watch television (n = 3990)

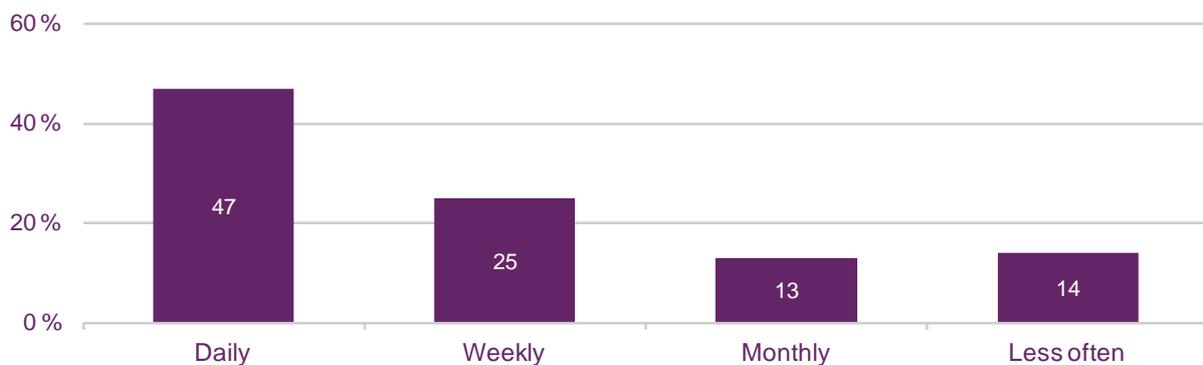
The top three 'meshing' activities for the youngest age group (16-24 year olds) are texting/instant messaging about programmes (32%), social networking/tweeting about programmes (25%), and social networking/tweeting about adverts (24%). In contrast, the older age groups (aged 55+) are mainly making voice calls to family and friends about programmes (12%), and to a much lesser extent, texting (7%) and looking online for information about programmes (6%), all in much lower volumes than the younger age groups.

Media meshing is a frequent activity, just under half (47%) of meshers claim to do it every day.

Media meshing is a frequently conducted activity. Forty-seven per cent of media meshers claim to do it daily, with one-quarter (25%) claiming to do it several times a day. An additional 25% are media meshing weekly.

Figure 1.18 Frequency of media meshing: any activity

Base: All who media mesh (37% of UK population)



Source: Ofcom omnibus survey 2013

Q. Generally how often do you use these devices in the ways we have just talked about while watching TV on a TV set in your home? Base: All who media mesh 'any activity' (1416)

One-quarter (25%) of all UK adults media mesh on a weekly basis, with one in six (16%) meshing daily.

When looking at these figures against the total UK population, around one in six UK adults (16%) are media meshing daily, with around one quarter (25%) media meshing at least weekly. Therefore, while the environment in which television is competing for attention is becoming increasingly complex, a significant minority of people are clearly actively involved with television content - the new points of access provided by technology are enabling this. New devices and technologies are therefore providing viewers with opportunities to *involve* themselves in television viewing, as well as providing distractions.

The demographic profile of weekly meshers skews younger (16-24), C1, working, with children in the household.

Figure 1.19 Demographic profile of weekly media meshers: any activity



Sources: Ofcom omnibus survey 2013

QD2C. Generally how often do you use these devices in the ways we have just talked about while watching TV on a TV set in your home? Base: All UK adults (4185)

Smartphones are the dominant devices used for facilitating media meshing, laptops and netbooks are important for social network meshing.

For the 16% of UK adults who have made or received calls to discuss a programme they are watching on television, smartphones (56%) and landlines (41%) are the devices most commonly used. But 17% of UK adults claim to make these calls through the internet using a computer (12% laptop/netbook, 5% tablet, 2% desktop). People making calls through the internet on a computer (including tablets) are significantly more likely to be aged 16-24 and ABC1.

We see a similar picture among people who text/instant message while watching programmes (17% of UK adults). Smartphones (73%) and mobile phones (19%) are the most commonly-used devices for texting or instant messaging, but people also claim to use laptops/netbooks (13%), tablets (6%) and desktop PCs (3%). In total, 19% of people who do this activity claim to do it on some type of computer.

While smartphones remain important for social networking about programmes (68% of people who do these activities use smartphones), laptop/netbooks (37%) and tablets (16%) are also being used more often for these activities. Meshers who own them are using them; the prominence of tablets (50%) and laptops/netbooks (50%) is significantly increased for this activity.

A similar picture is seen for social networking about advertisements.

Generally, users of these devices for this activity are more likely to be in the ABC1 socio-economic group, although this is likely to reflect the ownership profile.

Figure 1.20 Devices used: social activities

	Phone calls about programme	Texting or instant messaging about programme	Any using Social network to engage (programme)	Any using Social network to engage (advert)
% of all TV viewing adults who conduct the activity	16%	17%	11%	9%
Base	613	644	428	369
Smartphone	56%	73%	68%	68%
Mobile (non Smartphone)	21%	19%	7%	6%
Landline	41%	NA	NA	NA
Tablet	5%	6%	16%	19%
Laptop/netbook	12%	13%	37%	37%
Desktop	2%	3%	7%	8%
Other	-	-	1%	1%
ANY COMPUTER	17%	19%	52%	53%

Source: Ofcom omnibus survey 2013

QD2B. And which of the following devices did you use when you <ACTIVITY>?

Base: All who do activity (variable bases – see table)

Smartphones tend to dominate, or be the main device in active programme participation, although laptops and netbooks also play an important role

Clearly, computers are an important device when looking online for information about an advert or programme, with laptops and netbooks often being used for this. Of those who have searched online for information about a programme or ad they have just watched on television, around seven in ten are using a computer of some sort, with the majority (44% for programme info, 46% for advert info) using a laptop or a netbook. Smartphones play an equally important role as laptops and netbooks for these online search activities; similar numbers use this device to search online for information (47% for programme info, 45% for advert info).

Tablets are used by one in five media meshers for online searches about programmes and ads (22% and 25% respectively). Among the meshers who own these devices, usage is high; 59% use them to search for information about programmes, and 65% use them to search for information about adverts.

Direct programme participation, although an activity with low penetration, is most often done via a smartphone, particularly using programme apps. The prominence of smartphones as the preferred device for this activity is confirmed when looking at the data from smartphone owners. Among those who have participated in a programme (by voting or entering a competition), 62% did so using their smartphone. Tablet owners are also more likely to use a smartphone (41%) than their tablet (16%) for this activity.

Figure 1.21 Devices used: participation activities

	Any looking online for info (programme)	Any looking online for info (advert)	Any participation with programme e.g. voting, competitions	Any participation with programme using a specific programme app
% of all TV viewing adults who conduct the activity	12%	7%	6%	3%
Base	427	251	234	117
Smartphone	47%	45%	38%	60%
Mobile (non Smartphone)	2%	3%	15%	5%
Landline	NA	NA	37%	NA
Tablet	22%	25%	5%	11%
Laptop/netbook	44%	46%	13%	24%
Desktop	15%	15%	2%	2%
Other	1%	1%	-	-
ANY COMPUTER	70%	72%	21%	34%

Sources: Ofcom omnibus survey 2013

QD2B. And which of the following devices did you use when you <ACTIVITY>?

Base: All who do activity (variable bases – see table)

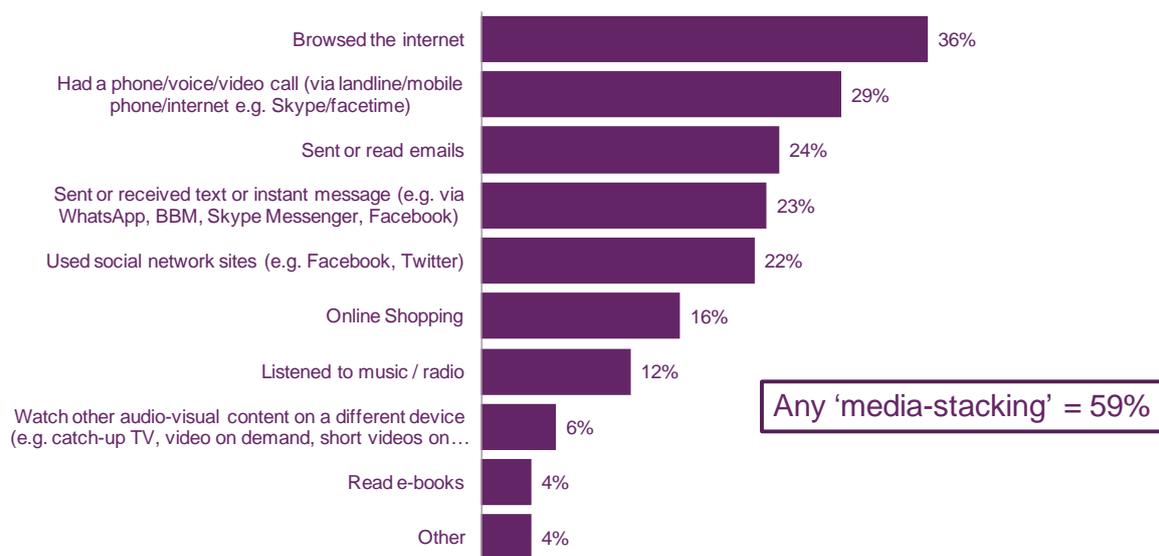
1.4.5 Media stacking

Media stacking is a more frequent activity than media meshing. Just under six in ten UK adults (56%) have ever ‘stacked’ their media use while watching TV.

Fifty-six per cent of all UK adults claim to have ever ‘media stacked’ while watching television - that is, engaged in activities on other devices *not* related to what they were watching at the time. Looking at TV viewers specifically, internet browsing is the most common activity, with over one-third of adults (36%) saying they have ever done this while watching television. Communicating with others, either via making/receiving phone calls (29%), sending/reading emails (24%), texting (23%) and social networking/tweeting (22%) are also common activities. Online shopping is a more minority activity, with around one in six (16%) claiming to have done this while watching television. Interestingly, some people are also engaging in other audio-visual activities, such as listening to radio (12%) and watching AV content on other devices (6%) which ties into other data seen elsewhere in this report; that people in the same room are often engaged in different activities on different devices at the same time.

Reading e-books is a less common activity, with one in twelve (4%) claiming ever to have done this. However, this low-penetration activity is influenced by the relatively low levels of e-reader owners; the media-stacking figure among e-reader owners is 20%.

Figure 1.22 Media stacking activities conducted while watching TV



Source: Ofcom omnibus survey 2013

QD3A. Whilst watching TV programmes on any TV set in your home, which, if any, of the following activities have you ever done? These activities do not relate to the programme that you were watching at the time. Base: All who watch television (n = 3990)

People in Northern Ireland are much more likely to ‘media stack’ than those in other nations, with phone calls being the most common activity.

People in Northern Ireland are significantly more likely to media stack than those in other nations (78% ‘any activity’), with voice calls being the most prolific, and significantly different activity (55%), compared to the other nations. This is the reverse picture to media meshing, where people in Northern Ireland were least likely to interact with or communicate about programmes.

Figure 1.23 Media stacking activities, by nation

	England	Scotland	Wales	Northern Ireland
Base	3332	338	205	125
Browsed the internet	36%	33%	41%	42%
Phone/voice/video call	28%	25%	37%	55%
Sent/read emails	25%	23%	19%	35%
Sent/received text/IM	23%	21%	28%	35%
Social networked	21%	24%	27%	35%
Online shopping	16%	13%	15%	20%
Listened to music/radio	11%	12%	10%	20%
Watched AV content on another device	5%	7%	7%	8%
Read e-books	4%	6%	4%	2%
ANY STACKING ACTIVITY	58%	53%	68%	78%

Source: Ofcom omnibus survey 2013

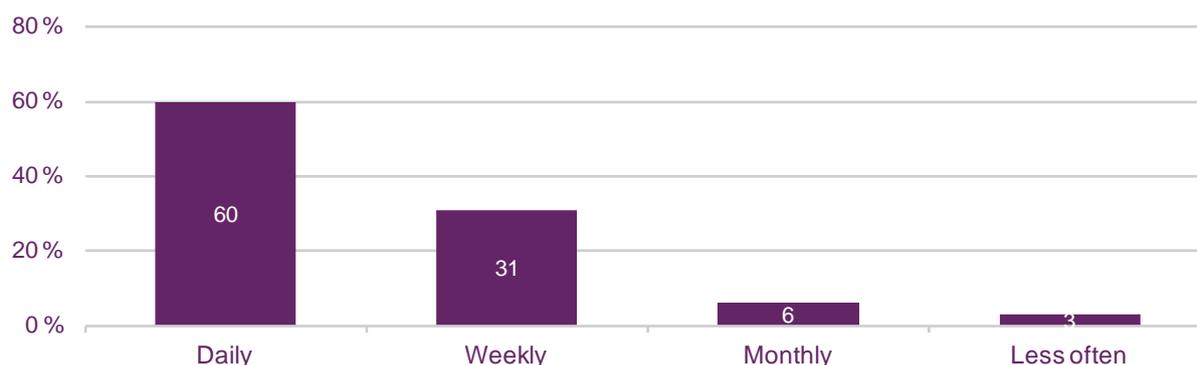
QD3A. Whilst watching TV programmes on any TV set in your home, which, if any, of the following activities have you ever done? These activities do not relate to the programme that you were watching at the time. Base: All who watch television (n = 3990)

Media stacking is more frequent than media meshing. Sixty per cent of ‘stackers’ claim to do so daily (compared to 47% of ‘meshers’).

Sixty per cent of media stackers claim to do this daily, with a quarter (30% claiming to do it several times a day). An additional 31% media stack weekly. An additional 31% media stack weekly.

Figure 1.24 Frequency of media stacking: any activity conducted

Base: All who media stack (59% of UK population)



Sources: Ofcom omnibus survey 2013

QD3C. Generally how often do you use these devices in the ways we have just talked about while watching TV on a TV set in your home?

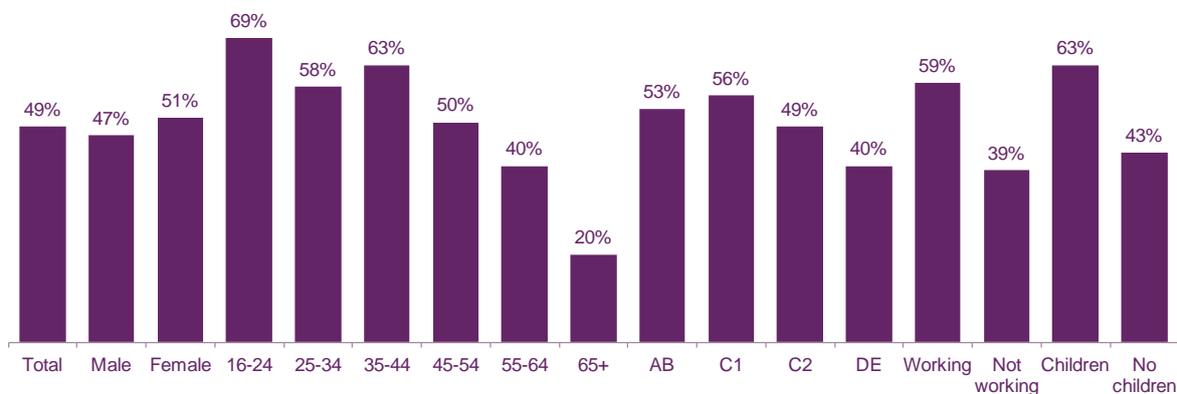
Base: All who do any media-stacking activity (2209)

One-third (33%) of all UK adults media stack on a daily basis. Around one half (49%) stack on a weekly basis

When looking at these figures against the total UK population, one third (33%) of UK adults are media stacking daily, with around a half (49%) media staking at least weekly. This confirms that that the environment in which television is competing for attention is getting increasingly complex, with an ever-expanding array of alternative devices that allow people to engage both with others (via texts/calls/social networks etc.) and with alternative AV media sources.

The demographic profile of weekly stackers skews towards female, the younger and middle age ranges, working people and households containing children.

Figure 1.25 Demographic profile of weekly media stackers: any activity conducted



Source: Ofcom omnibus survey 2013 QD2C. Generally how often do you use these devices in the ways we have just talked about while watching TV on a TV set in your home? Base: All UK adults (4185)

Laptops and netbooks are equally as popular as smartphones for emailing while watching TV. They are also used for social networking.

Among the 29% of UK adults who make and receive calls while they are watching television, which are not related to the programme they are watching, smartphones (48%) and landlines (44%) are the most common methods used. But 15% of UK adults claim to make calls using a computer (10% laptop/netbook, 5% tablet, 2% desktop) to make calls through the internet. Smartphones (68%) and mobiles (21%) are the main device used for texting/instant messaging, although there is also some computer/laptop/tablet use (25% 'any' computer).

Laptops/netbooks and, to a lesser extent tablets, are also commonly used for emails and social networking. Stackers who own these devices tend to use them more frequently. Fifty-four per cent of people who own a tablet email from it, and 65% of people who own a laptop or netbook email from this device. The same is seen when looking at social networking. Fifty-seven per cent of people who own a tablet do social networking from this device, as do 58% of people who own a laptop or netbook.

Figure 1.26 Devices used: ‘social’ stacking activities

	Make/receive phone/voice/video calls	Send/read emails	Send/receive texts or instant messaging	Use social network sites
% of all TV viewing adults who conduct the activity	29%	24%	23%	22%
Base	1116	898	900	848
Smartphone	48%	51%	68%	63%
Mobile (non Smartphone)	26%	5%	21%	7%
Landline	44%	NA	NA	NA
Tablet	5%	20%	8%	19%
Laptop/netbook	10%	50%	17%	45%
Desktop	2%	10%	3%	7%
E-reader	-	1%	1%	1%
ANY COMPUTER	15%	71%	25%	62%

Source: Ofcom omnibus survey 2013

QD3B. And which of the following devices did you use when you <ACTIVITY>?

Base: All who do activity (variable bases – see table)

As with meshing, laptops and netbooks play a more important role in ‘stacking’ activities, particularly for browsing the internet and online shopping.

Among the 36% of UK adults who browse the internet while watching TV, just under half (47%) do so on a smartphone. About half do so on a laptop/netbook (53%) while tablets are also used (23%).

Owners of tablets and laptops/netbooks use these devices much more for these activities. Sixty-seven per cent of people who own a tablet browse the internet from this device, and 68% of people who own a laptop or netbook browse the internet from that device. The same is seen when looking at social networking. Fifty-seven per cent of people who own a tablet do social networking from this device, as do 58% of people who own a laptop or netbook.

Laptops and netbooks are used most commonly for online shopping (59%), followed by smartphones (38%) and tablets (25%). Again, for owners of these devices, the figures increase significantly. Smartphone use among smartphone owners rises to 48%, tablet use among tablet owners rises to 59% and laptop/netbook use among laptop/netbook owners rises to 72% - clearly indicating the popularity of this device for this activity.

Interestingly, smartphones are the device used most for watching audio-visual content on other devices while also watching TV. While this is a low-incidence activity, with only 6% of the UK TV viewing population doing it, nearly six in ten (59%) do it on their smartphone. Tablets (63%) and netbooks/laptops become similarly important when looking at the data among owners of these devices.

E-readers are the device of choice for reading e-books while watching TV, but smartphones and tablets are also used. The figures for use by device owners are: e-readers 91%, tablets 43%, smartphones 28%.

Figure 1.27 Devices used: 'non-social' stacking activities

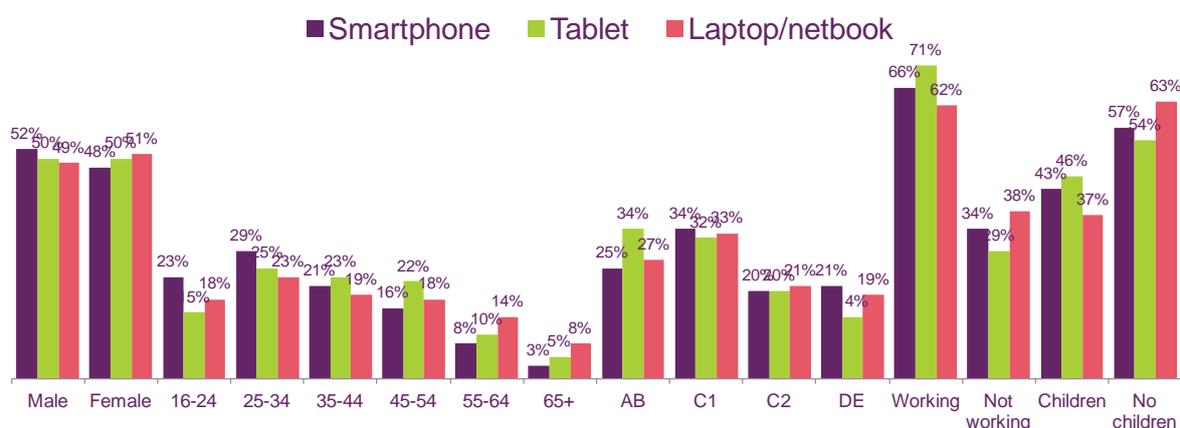
	Browsed the internet	Shopped online	Listened to music/radio	Watched other AV content on a different device	Read e-books
% of all TV viewing adults who conduct the activity	36%	16%	12%	6%	4%
Base	1352	592	455	209	147
Smartphone	47%	38%	46%	59%	21%
Mobile (non Smartphone)	5%	2%	7%	5%	1%
Tablet	23%	25%	11%	27%	20%
Laptop/netbook	53%	59%	28%	46%	11%
Desktop	10%	9%	7%	14%	3%
E-reader	-	-	-	1%	49%
ANY COMPUTER	74%	80%	42%	72%	31%

Source: Ofcom omnibus survey 2013
 QD2B. And which of the following devices did you use when you <ACTIVITY>?
 Base: All who do activity (variable bases – see table)

1.4.6 Smartphones versus tablets versus netbooks/laptops: a specific look at owners of different devices

In the online survey, 51% of our sample were smartphone owners, 20% were tablet owners and 56% were laptop/netbook owners. In our analysis of the demographic profile of these ownership groups, smartphone owner demographics skew slightly more male and younger (16-24/25-34). Tablet owner demographics are more AB and middle aged (35-44/45-54), and are more likely to be in work. Laptop and netbook owner demographics skew marginally more female than the other two ownership groups, have the oldest age profile, are the most likely to be not working and not to have children living at home.

Figure 1.28 Demographic profile: smartphone vs. tablet owners vs. laptop/netbook owners



Sources: Ofcom omnibus survey 2013
 QA. Do you personally own any of the following devices?
 Base: All who do own a smartphone (2039), a tablet (747) or a laptop/netbook (2208).

Tablet owners tend to own more devices overall than the other two groups. The majority also own a smartphone (80%) and a laptop (76%). Just under half (45%) also own an e-reader. This suggests that tablet owners are generally high technology owners and may include a large proportion of early adopters.

Around a third of smartphone owners (31%) and netbook/laptop owners (27%) also own a tablet.

Figure 1.29 Devices owned

	Smartphone owners	Tablet owners	Laptop/netbook owners
% of all adults who own this device	51%	20%	56%
Base	2039	747	2208
Smartphone	100%	80%	66%
Laptop/netbook	72%	76%	100%
Tablet	31%	20%	27%
Desktop	35%	45%	31%
E-reader	16%	29%	17%
ANY COMPUTER	50%	100%	100%

Source: Ofcom omnibus survey 2013

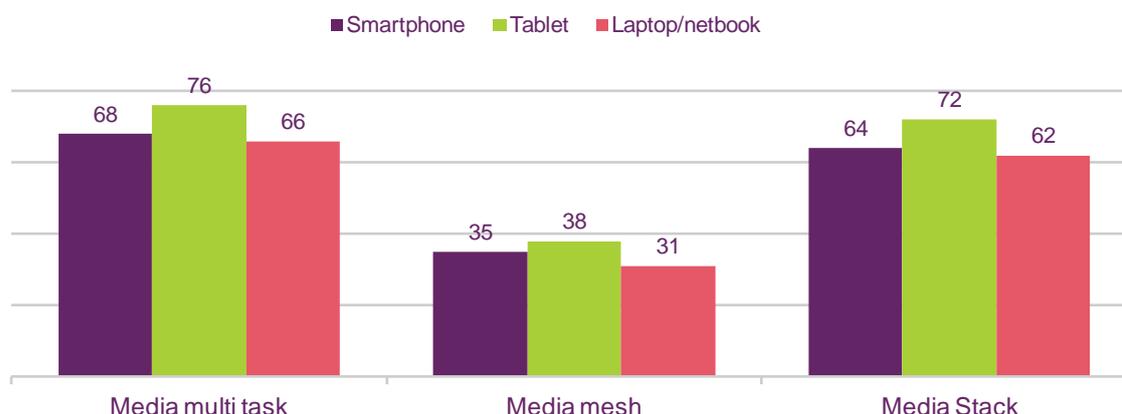
QA. Do you personally own any of the following devices?

Base: All who own a smartphone (2039), a tablet (747) or a laptop/netbook (2208).

Tablet owners are more likely to media multi-task; unsurprising, given their level of device ownership.

Data reported earlier in this section show that just over half (53%) of all UK adults are regular media multi-taskers i.e. they stack and/or mesh weekly or more often. It is clear that smartphone owners, tablet owners and netbook/laptop owners all media multi-task more than average. But tablet owners are the most prolific, with around three-quarters (76%) media-multi tasking at least weekly.

Figure 1.30 Weekly multi-tasking, meshing and stacking, by device owned



Source: Ofcom omnibus survey 2013

Base: All who own a smartphone (2039), a tablet (747) and/or a laptop/netbook (2208).

In order to further evaluate the impact of smartphones, tablets and laptops/netbooks, it is useful to look at some specific media meshing and media stacking activities that lend themselves to using these particular devices, to see if there are any interesting differences in use.

When we analysed specific media meshing activities, we saw that smartphones are the device of choice for social networking about a programme, among all three ownership groups. Tablets are also used by half of all tablet owners for this activity. Correspondingly, half of all laptop/netbook owners use their laptop/netbook for social networking about programmes.

When considering ‘looking online for programme information’, the tablet is the most common device used among tablet owners, with 59% of owners using this device for this activity. Forty-seven per cent of tablet owners also use their smartphone. A similar number of laptop/netbook owners use their laptop/netbook for this activity (59%), followed by 47% who use their smartphone. Smartphone owners tend to use their smartphone (61%), although 65% also use a type of computer.

Among people who have participated in programmes (e.g. voted), the smartphone is the most common device used across all three ownership categories.

Figure 1.31 Devices used: media meshing

	Social networked about a programme			Looked online for programme info			Participated in a programme e.g. voted		
	Smart-phone owners	Tablet owners	Laptop/netbook owners	Smart-phone owners	Tablet owners	Laptop/netbook owners	Smart-phone owners	Tablet owners	Laptop/netbook owners
% of all owners who have conducted this activity	18%	17%	14%	18%	22%	16%	8%	9%	8%
Base: N =	361	129	310	323	150	317	144	64*	158
Smartphone	81	70	66	61	47	49	62	41	42
Tablet	19	50	17	25	59	21	6	16	5
Laptop/netbook	32	33	50	40	36	59	13	8	19
Desktop	6	6	6	13	10	8	2	2	-
ANY COMPUTER	48	69	63	65	81	75	21	27	24

Sources: Ofcom omnibus survey 2013

QD2B. And which of the following devices did you use when you <ACTIVITY>?

Base: All who do activity (variable bases – see table)

When we analyse specific media-stacking activities, we see that tablets and/or laptops/netbooks are the devices of choice for online shopping among all three ownership groups. This makes sense, due to the bigger screen size.

Smartphones are the most-used device for viewing AV content on additional devices while watching TV, across all ownership groups (smartphone owners 67%, tablet owners 63%, laptop/netbooks owners 60%), although the use of tablets by tablet owners, at 63%, challenges this figure.

Among people who listen to music/radio while watching television, the smartphone is the device used most often, across all three ownership categories.

Figure 1.32 Devices used: media stacking

	Shopped online			Watched AV content			Listened to music/radio		
	Smart-phone owners	Tablet owners	Laptop/netbook owners	Smart-phone owners	Tablet owners	Laptop/netbook owners	Smart-phone owners	Tablet owners	Laptop/netbook owners
% of owners who have conducted this activity	25%	33%	23%	10%	12%	8%	16%	15%	14%
Base: N =	467	237	474	184	87	169	312	116	292
Smartphone	48	40	36	67	61	60	67	58	50
Tablet	27	59	23	28	63	27	15	42	13
Laptop/netbook	57	48	72	46	41	57	31	28	43
Desktop	8	9	5	13	6	8	7	10	6
ANY COMPUTER	78	89	87	71	80	74	46	62	54

Source: Ofcom omnibus survey 2013

QD3B. And which of the following devices did you use when you <ACTIVITY>?

Base: All who do activity (variable bases – see table)

All of the above data suggest that people who own more devices media multi-task more than average. This is unsurprising, as they have access to more devices and therefore more potential ways of engaging with programmes, or simply using the device while watching TV. Consistent with other findings in this report, the data suggest that consumers are choosing to use certain devices for certain activities; for example, smartphones remain the dominant device for social network meshing, even among tablet owners. There is also some apparent substitution of activities between devices as more devices are acquired. For example, tablet owners appear more likely to conduct certain activities on their tablets (searching online for programme information, such as online shopping, watching AV content) which they might previously have done on their smartphone or laptop/netbook.

1.5 The rising use of tablet computers

1.5.1 Introduction

Tablet computer ownership more than doubled between 2012 and 2013 and a quarter (24%) of households now own at least one of these devices³. Early adopters tended to be older (45-54), more affluent households and those with children. But in 2013 we see the age profile of tablet owners decreasing, with nearly three in ten 25-34 year-olds owning a tablet, up from just 11% in 2012, and growth among all socio-economic groups.

Given the capabilities of these devices (providing an alternative means of internet access), the potential for them to add a 'second screen' to the household (for viewing TV content) and the rapid rise in take-up, the following section explores the impact these devices are already having on use of other services and devices.

1.5.2 Key points

This research summarises the trend in ownership and use of tablet computers and explores the impact this is having on use of other devices and viewing habits.

- **Tablet computer ownership more than doubled in the past year, and half of owners say they now couldn't live without their tablet.** Tablet ownership rose to 24% in Q1 2013. 'Entertainment' (50%) was the main reason for purchase, followed by its ability to provide 'easy access to the internet', stated by 45% of tablet owners.
- **One in ten households has more than one tablet, and weekly users spend an average of 1 hour 45 minutes each day on their device.** Two-thirds of tablet owners use their device on a daily basis, with two in five using it multiple times during the day. In total just under half (46%) of tablet owners claim to have a 3G-enabled device, but less than half of these (20% of tablet owners) have a mobile subscription enabling 3G connectivity.
- **Tablets are viewed as the main method of connecting to the internet by a third of users.** Among tablet-owning households, this device is now on a par with the laptop as the most important device for connecting to the internet. This is consistent with the rising proportion of web-page views generated from tablets (doubling to 8% in the past 12 months) and the declining proportion generated from PCs and laptops (down by 20pp).
- **'Bigger screen' activities such as watching TV programmes or movies are evolving as tablet oriented.** Sixty-nine per cent of those who view this type of AV content and have both a tablet and smartphone say they do this more on their tablet. There is also a rising preference for tablets for internet browsing (45%, up from 39%), and watching short video clips (48%, up from 31%) among those who do these types of activities and have both devices.
- **The share of VOD requests coming from tablets increased from 3% to 12% between 2011 and 2012.** Just over half (56%) of tablet owners use their device for watching AV content; the most common are streamed TV programmes and films. More than half (57%) of tablet AV content viewers say they watch linear TV on a weekly basis and a similar proportion (54%) say they watch catch-up TV weekly on their tablet.

³ Source: Ofcom Technology Tracker Q1 2013

- **Bedrooms, and main TV rooms, are popular locations to view AV content on a tablet.** The most common location for viewing AV content on either a tablet or a smartphone at home is in the bedroom; six in ten tablet owners claim to view content in this location. This is followed by the main TV room (48%). On average, over one in ten (11%) view video content on a tablet in the bathroom, and this is twice as popular among 18-24 year olds (20%).
- **Three in ten tablet AV content viewers share their tablet with their children for TV-type viewing.** The large majority (91%) of parents with tablets said their children either use their tablet, or have a tablet of their own to use, for activities other than just watching AV content. Four in five parents said their children used a tablet computer at least weekly, with two in five reporting daily use by their children and 17% saying their children use it more than once a day. A majority (76%) of these parents consider the tablet a useful tool for entertaining and/or educating their children.

1.5.3 Ownership of tablets

What is a tablet computer?

A tablet computer is a self-contained mobile computer. Users typically control tablets using a touch-screen interface, or a stylus, replacing the mouse used with laptop and desktop computers. Software keyboards are used for user input, but some models may also be used with peripheral hardware keyboards.

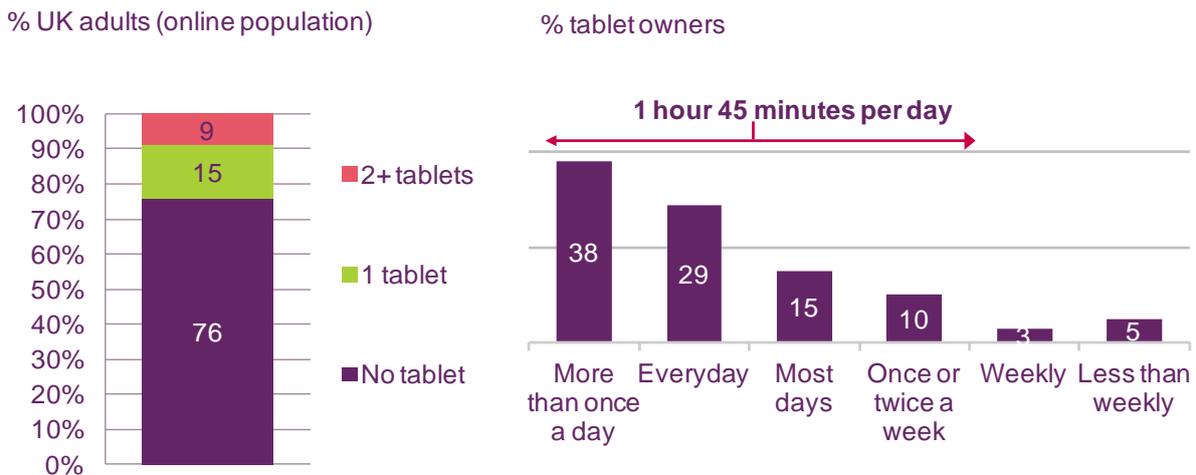
Tablets vary in size, but popular models have a screen size of 7 inches or more (measured diagonally); larger than smartphones but smaller than most laptops. Tablet operating systems are similar to those for smartphones, so many of the same applications are available for users to download and run.

Popular brands of tablet include the Apple iPad, Kindle Fire and the Google Nexus 7.

One in ten households (9%) have more than one tablet computer

Tablet-owning homes have, on average, 1.5 tablets; 37% have more than one (this equates to 9% of UK adults). Eighty-two per cent of owners use their tablet nearly every day, with around two in five (38%) using it more than once a day and 95% using it at least once a week. Weekly users are spending an average of 1 hour and 45 minutes each day using this device.

Figure 1.33 Ownership and use of tablet computers



Source: Ofcom research, 2013

Q. How many tablets are owned by your household? How often do you tend to use your tablet? Q. On average, how much time do you spend using your tablet in a day, in total?

Base: All respondents who own a tablet computer (1,201)/Use a tablet at least a couple of times a week (1100)

Entertainment (50%) was the main reason for purchase, with the tablet's ability to provide 'easy access to the internet also one of the key drivers, stated by 45% of tablet owners. 'Convenience' and 'portability were also stated as reasons to buy (42% and 39% respectively).

Many owners view their tablets as essential; they are exceeding expectations

Tablets are highly-valued devices; half of owners say they now "couldn't live without it", up from 34% last year. The only demographic difference is that women are more likely than men to agree with this statement (54% vs. 45%). Older tablet owners are as likely as younger owners to agree that they couldn't live without this device. For the vast majority (95%) their tablet is meeting, or exceeding, their initial expectations; only 3% are dissatisfied.

Despite the portability of the tablet, and the fact that portability is one of the key reasons to buy it, most users (85%) use them mainly in the home⁴. This suggests the 'portability' aspect may relate to being able to use it in different rooms in the home, as opposed to outside. This is further supported by the fact that three-quarters (76%) of tablet owners who connect to the internet say they only use WiFi, while one-fifth (22%) use both WiFi and 3G connections. Although some of these may be using public WiFi connections, the data suggest that most internet connectivity is via a home WiFi connection. In total just under half (46%) of tablet owners claim to have a 3G-enabled device but less than half of these (20% of tablet owners) have a mobile subscription enabling their 3G connection⁵.

According to Ofcom's online survey among tablet owners, the Apple iPad remains the most popular brand overall, at just over half (56%) of tablet owners, followed by Samsung (12%). Research conducted in December 2012 - January 2013⁶ reports a consumer perception of being 'locked in' if several devices in the home are of the same brand. It also suggests that

⁴ Source: Kantar Media Research, Face to face survey, 2013

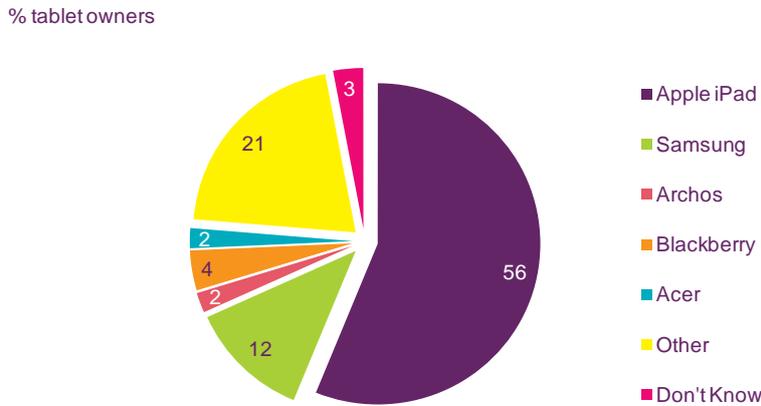
⁵ Source: Ofcom Technology Tracker, Q1 2013

⁶ Source: Ofcom Customer Retention and Interoperability Report

http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-retention/CRI_Report_Final.pdf

among the population of tablet owners who have purchased a second device or replaced their device, the majority stuck to the same brand.

Figure 1.34 Claimed ownership, by tablet brand



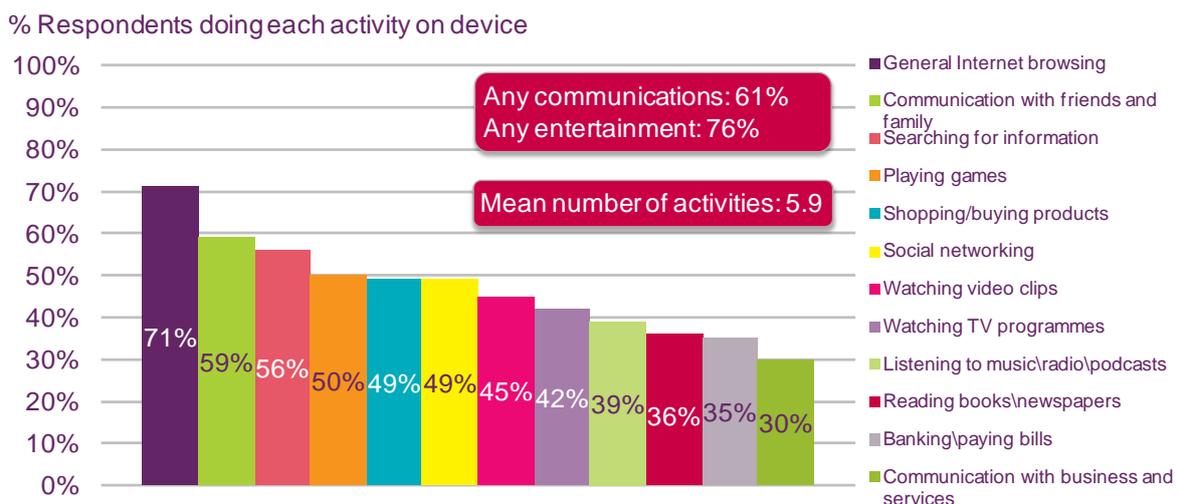
Source: Ofcom online survey, 2013
 Q. What brand of tablet computer is it?
 Base: All respondents who own a tablet computer (1,201)

1.5.4 Activities conducted on a tablet

Most tablet owners use their tablet for internet browsing and around half watch AV content on their device

Tablets are being used for an average of six different activities from the list of 12 presented in the survey. The most common activity is internet browsing, followed by communicating with friends and family, searching for information, playing games, social networking and shopping.

Figure 1.35 Activities conducted on a tablet



Source: Ofcom research, 2013
 Base: All who have a tablet (N=608)

People are watching television and catch-up services on their tablets, mirroring their television viewing choices.

In total 56% of tablet owners use their device for viewing audio-visual (AV) content such as video clips and TV programmes. Just under half (45%) say they watch video clips and a similar proportion watch TV programmes on their tablet (42%). AV viewing on tablets is likely to be via apps - half of all tablet owners say they have downloaded at least one TV app, such as iPlayer or ITV on Demand, onto their tablet.

Whether via an app or a browser, over half (57%) of all tablet content viewers claim to view linear television on their tablet at least weekly⁷. A similar number (54%) claim to watch catch-up TV services on a weekly basis.

Over one-third (37%) of tablet content viewers say they use their tablets to watch other types of internet-delivered content (e.g. short video clips via YouTube) daily, with a further three in ten (30%) watching this type of content on their tablet weekly. This is the most frequently-viewed type of content type, of those measured. Daily viewers of this type of internet-delivered content on a tablet are significantly more likely to be male and/or ABC1, and are also more likely to be in the younger age groups (18-24 and 25-34).

TV and film services such as Netflix and Lovefilm, purchased on a monthly rolling contract generally following a month’s free trial, are viewed the least frequently by tablet content viewers. Around a quarter (26%) say they watch this type of content on a weekly basis.

Figure 1.36 Frequency of viewing different services on a tablet



Source: Ofcom online survey, 2013

Q.How often, if at all, do you watchon your tablet?

Base: All watching TV, films or short videos clips on a tablet (n= 869)

1.5.5 Impact of tablet on use of other service and devices

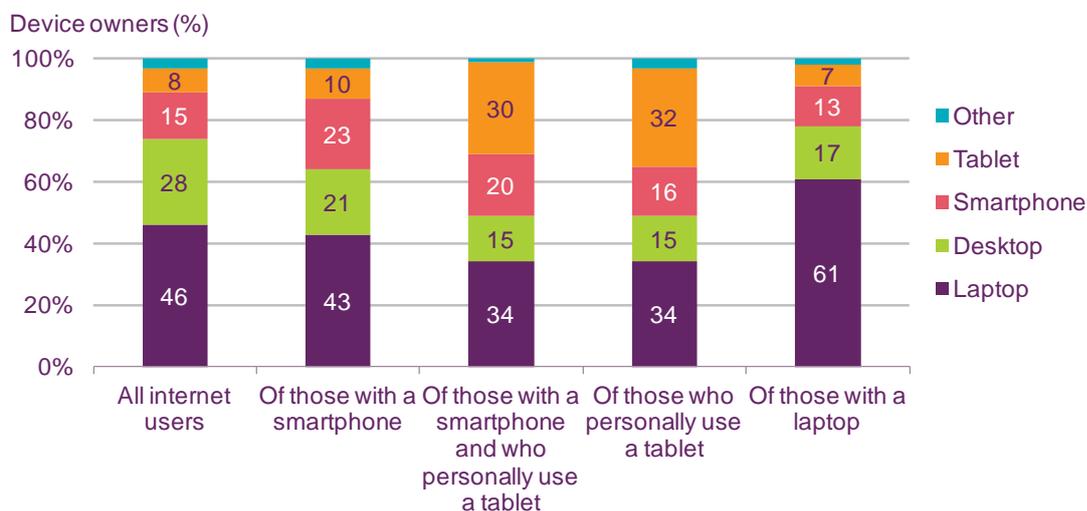
Tablets are viewed as main method of connecting to the internet by a third of users

With nearly all (98%) tablet owners saying they connect to the internet using this device, and three-quarters using it for general internet browsing, and the rising proportion of web-page views being generated from tablets, it is not surprising that tablets are having an impact on consumers’ stated “main method of connecting to the internet”.

⁷ Source: Ofcom online survey, 2013

At an overall UK level, 8% of internet users aged 16+ say their tablet is their main method of connecting to the internet, but this rises to 32% among tablet users. Among people who have both a tablet and a smartphone, stated preference for the laptop stands at 34% (down from 46% across all internet users) with tablets four percentage points lower at 30%, exceeding smartphones at 20%.

Figure 1.37 Most important device for internet access



Source: Ofcom research, 2013

Q. Which is the most important device you use to connect to the internet, at home or elsewhere?
 'Other' responses include: 'Netbook', 'games console', 'other device', 'none' and 'don't know'.

More than half of tablet owners do other things at the same time as using their device

As in the *Media multi-tasking* section, which focuses on activities conducted while watching TV, we asked tablet owners what, if any, multi-tasking they had done while using their tablet. Half (51%) said they had watched TV, just over a quarter (27%) said they had listened to music, and just under a quarter (24%) said they had listened to the radio.

Around a third (35%) of tablet owners said they had used their mobile at the same time as their tablet, and a quarter (26%) had used their laptop at the same time. Simultaneous use of these devices alongside tablets will include some degree of content sharing, as well as conducting different tasks on each device.

Despite having similar functionality, tablets and smartphones are used for different activities

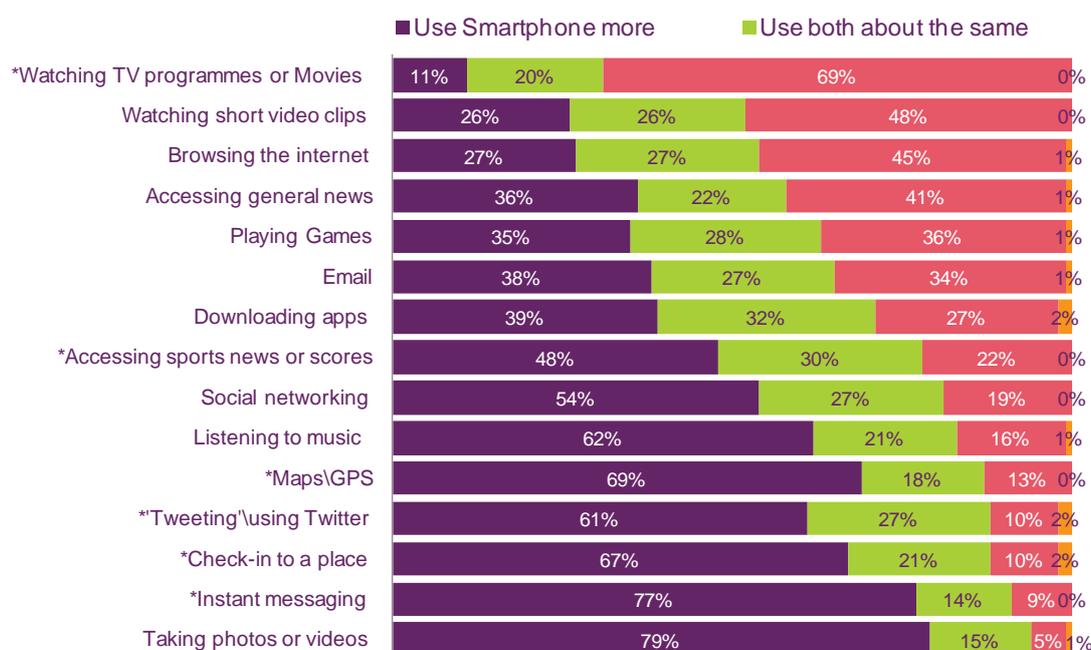
Data from 2012 suggested that relatively high proportions (up to around two in five) of consumers with both a tablet and smartphone carried out various activities equally on their tablet and their smartphone. Some respondents continue to say this, but the proportions are now significantly lower (now up to about a third), suggesting that users are choosing one device in preference to the other for some activities.

For some activities, there is a clear device preference across all consumers; probably linked to the size and functionality of smartphones, which lend themselves to certain activities more than a tablet. Seventy-nine per cent use a smartphone more for taking photos (compared to 5% who use a tablet more), a similar proportion use a smartphone more for instant messaging, and 69% use a smartphone more for maps.

Some activities are beginning to evolve as tablet-oriented activities, such as watching TV programmes or movies (69% do this more on their tablet). Other activities where the preference is tipping towards tablets include internet browsing (45%, up from 39%) and watching short video clips (48%, up from 31%). Social networking via a tablet has declined since last year; smartphones are now the preferred device for this activity (54% vs. 19%).

Figure 1.38 Which device is used more for specific activities by smartphone AND tablet users

% all users of Smartphone AND Tablet in the UK (ordered on tablet preference)



Source: Ofcom research, 2013

Base: All who use a smartphone and a tablet and do each activity (2,092)

Q. You mentioned earlier that as well as a smartphone you also have a tablet. Since you have had both a tablet computer and a smartphone, which device do you use more for the following activities?

* Caution low base

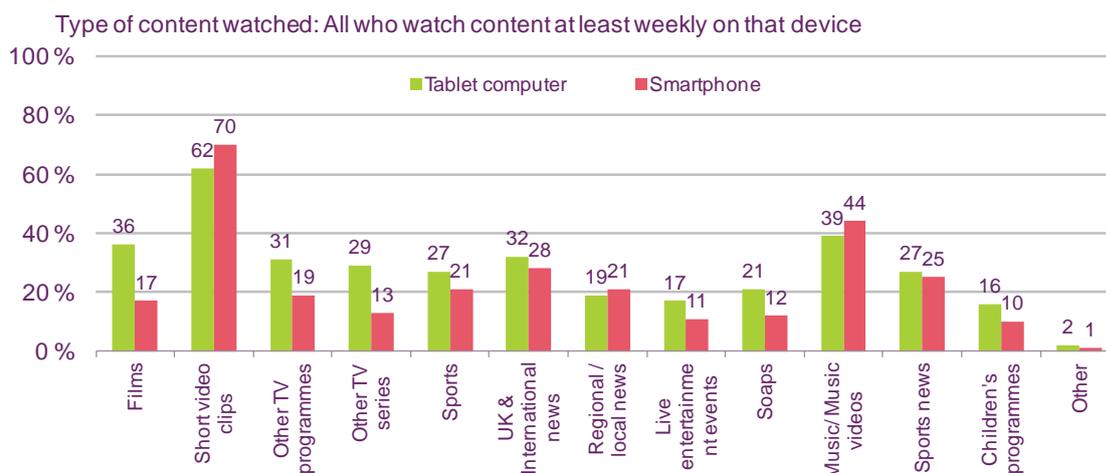
More TV-type content viewed on tablets than on smartphones

The most popular types of content to view on a tablet are broadly similar to those viewed on a smartphone. For both tablets and smartphones, short video clips are most commonly cited (62% and 70% respectively), while music videos are the second most popular response (39% and 44% respectively).

However, TV-type content is viewed more on tablets than on smartphones. Just over a third (36%) of tablet content viewers say they have watched films, 32% cite UK and international news and a further 27% watch sports news and 19% watch regional or local news. Thirty-one per cent watch TV programmes other than series and soaps, and 29% watch TV series on their tablet.

News is also a popular content viewing choice on smartphones; 28% watch UK and international news, 25% watch sports news and 21% watch regional or local news. Only 17% of smartphone owners who watch content at least weekly claim to watch films.

Figure 1.39 Type of content watched over the internet: tablet vs. smartphone



Source: Ofcom online survey 2013

Q. And what types of content are you watching on your

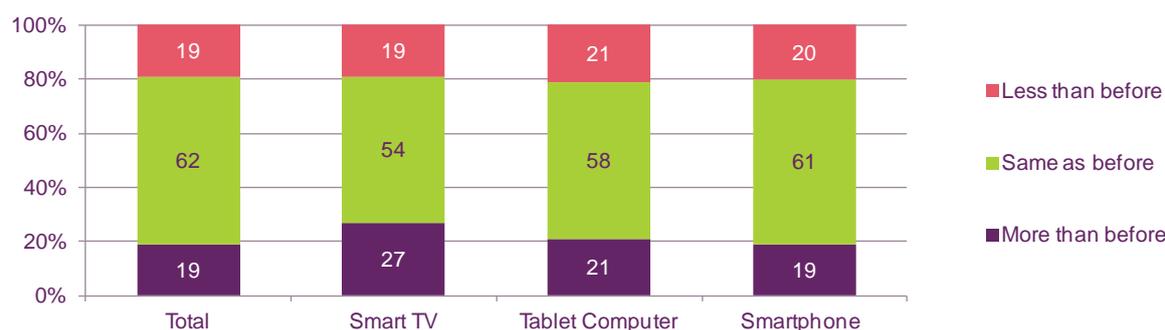
Base: All watching TV, films or short videos clips on a tablet and/or smartphone (variable base sizes)

The impact of tablets on viewing live TV is polarised; some say they now watch more while others say they watch less

While linear television viewing remains dominant, and people continue to enjoy television together as a family, the adoption of other devices is changing the way people watch TV. Around one in five of our sample of smart TV owners, tablet owners and smartphone owners claim to watch less linear television than before they got these devices. But an equal number claim that they watch more, particularly in households where there is a smart TV.

The impact of tablets on overall AV viewing is polarised; similar proportions say they now watch more live TV as say they watch less live TV since owning these devices.

Figure 1.40 Frequency of watching linear TV after device adoption



Source: Ofcom online survey 2013

Q. And would you say you and your family/household are watching more or less live TV than before you got a [smart TV and/ or smartphone and/ or tablet]?

Base: All respondents own at least one device (tablet computer/ smart TV/ smartphone) (1,676)

The research also shows that tablets are having a further impact on the DVD market; 20% of tablet owners say they now watch fewer DVDs as a result.

1.5.6 Family viewing habits among tablet owners

Taking into account the increase in tablet ownership and the relatively high use of these devices for TV-type viewing in the home, this section provides an overview of family viewing habits, providing an insight into collective and individual viewing in the homes of tablet owners.

Tablet owners living in multi-person households are the base for the following research findings.

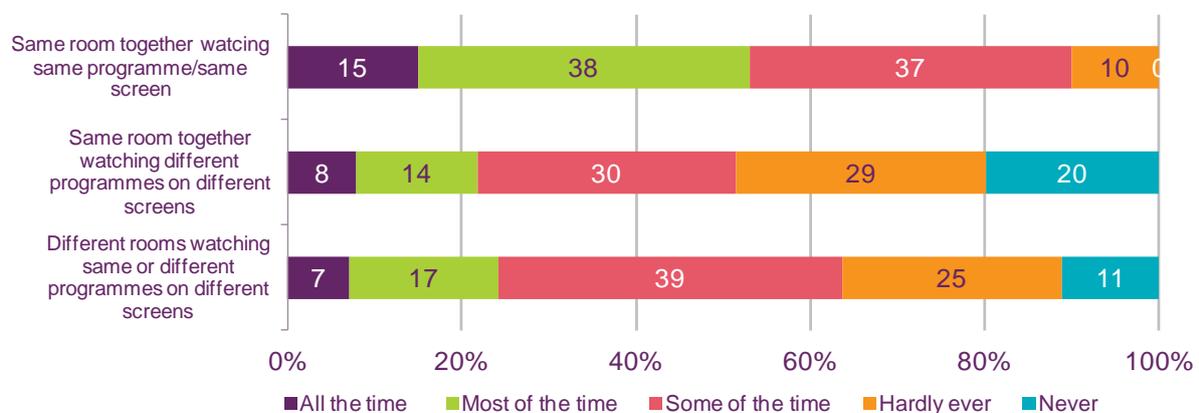
Family viewing in front of a single screen continues to endure, even in households with multiple screen access

The survey data show that collective family viewing on a single screen, in a room with everyone together continues to endure, even among households with multiple devices, and with the multitude of viewing options that these devices offer. Nine in ten of these tablet owners claim to be in the same room as others, watching the same programme on the same screen 'at least some of the time', with 53% saying they do this 'all or most of the time'.

However, more than half (52%) of tablet owners in multi-person households say they are watching different screens while in the same room 'at least some of the time'. Twenty-two per cent say they are watching different programmes on different screens in the same room 'all or most of the time', with a further 30% saying they do this 'at least some of the time'.

The profile of those watching, either on different screens in the same room, or on different screens in different rooms, tend to be more male, AB and 18-24.

Figure 1.41 Household viewing habits



Source: Ofcom online survey 2013

Q. How often, if at all, do you all sit together and watch the same programme on the same set? And how often, if at all, do people in your household sit together in the same room but watch different screens? And how often, if at all, do people in your household sit together in the same room but watch different programmes on different screens?

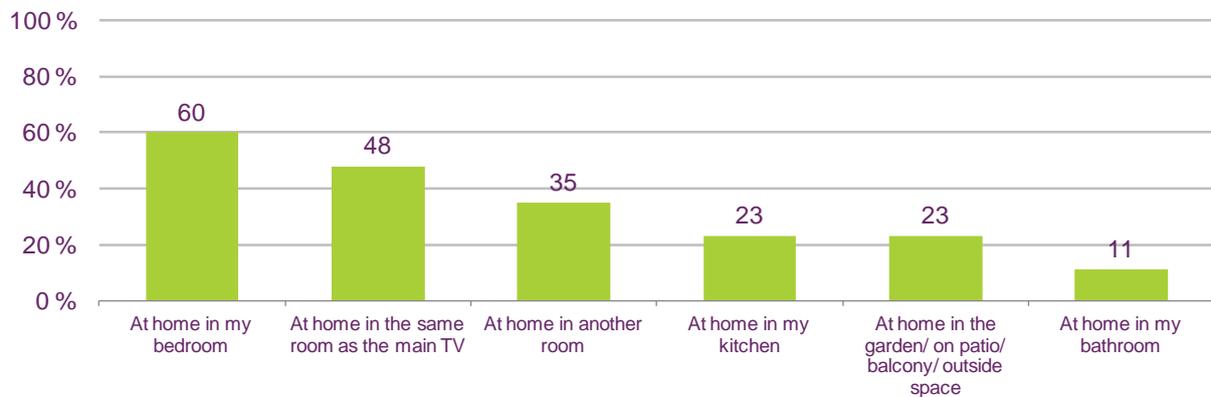
Base: All tablet owners living in multi-person household (1,142)

Bedrooms, and a second screen in the main TV room, are popular locations for viewing AV content on a tablet. One in ten (11%) view content in the bathroom.

We reported earlier that 86% of tablet owners use their device mainly in home. The most common location for viewing content on either a tablet or a smartphone at home is in the bedroom. Six in ten tablet owners claim to view content in this location. This is followed by the room containing the main TV set (48%). On average, over one in ten (11%) view content

on these devices while in the bathroom, and this location is twice as popular for 18-24 year olds (20%).

Figure 1.42 Locations for viewing content in the home: tablet



Sources: Ofcom online survey 2013

Q. And where do you watch these types of content on your..?

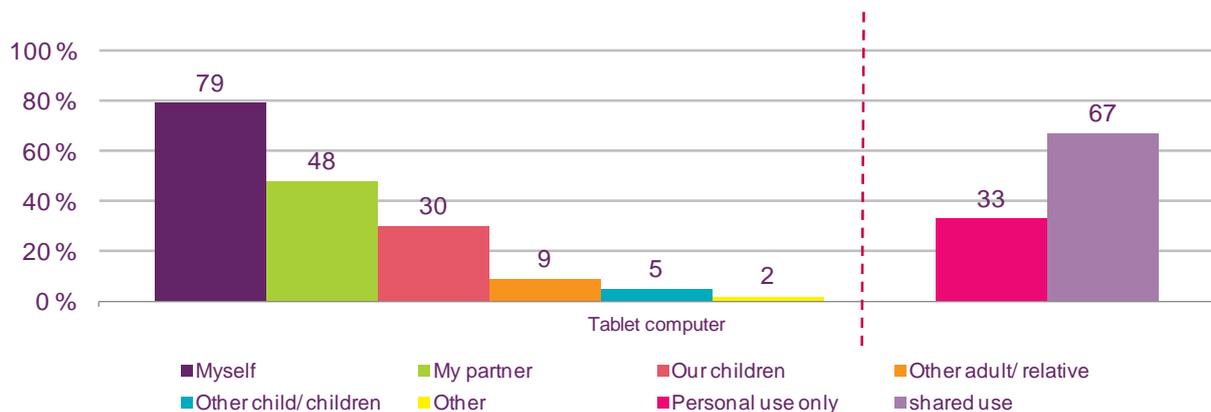
Base: All watching TV, films or short videos clips on a tablet/smartphone (n= 869)

1.5.7 Use of tablet computers by children

Tablets tend to be shared devices in the household

At least half (48%) of tablet content viewers say they share the device with someone else for viewing TV programmes or other types of video content. This is often their partner, but 30% share their tablet with children for TV-type viewing.

Figure 1.43 Shared vs. personal viewing device



Source: Ofcom online survey 2013

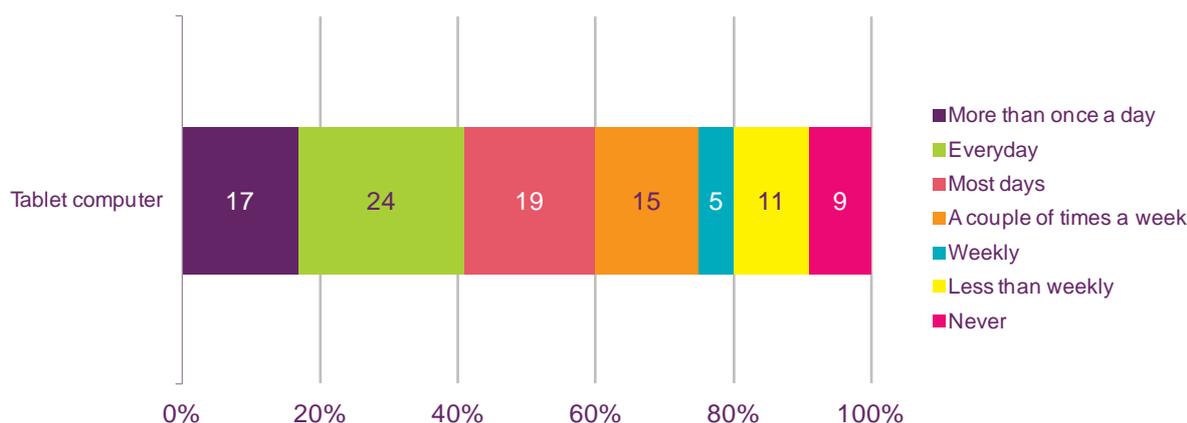
Q. Who else in the household is using these devices to watch TV programmes and other types of video content?

Base: All respondents who own a tablet computer (1,676)

Two in five parents with tablets say their children use the device daily, largely for entertainment

Four in five parents said their children used a tablet computer at least weekly, with two in five (41%) reporting daily use by their children and 17% reporting that their children use it more than once a day.

Figure 1.44 Frequency of children's use of a tablet



Source: Ofcom online survey 2013

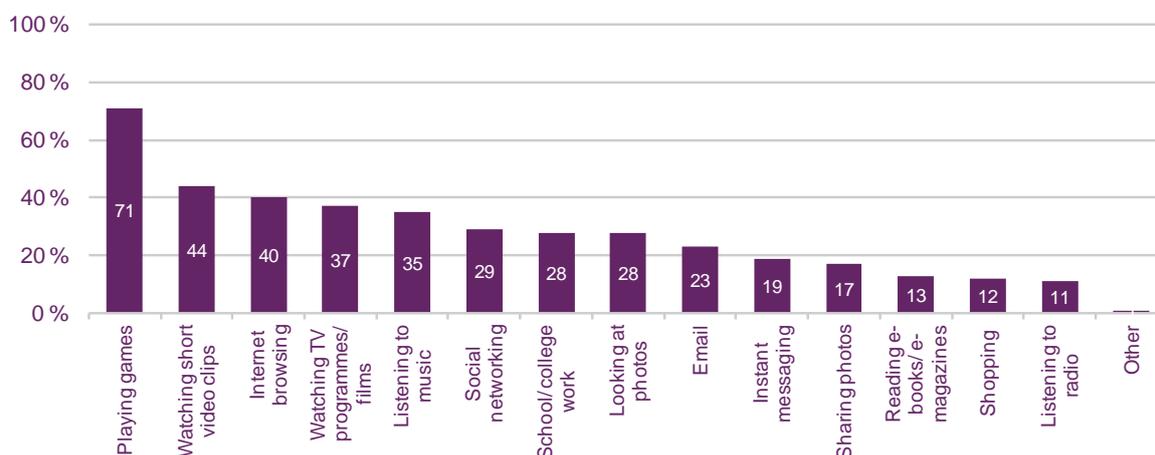
Q. How often, if at all, do your children use your tablet computer or another tablet in the house?

Base: All respondents who own a tablet computer and have children under 18 yrs (678)

Tablet computers are used by children mainly for entertainment, with games being the most popular activity conducted

The large majority (91%) of parents with tablets said their children either use their tablet, or have a tablet of their own, for activities other than just watching content. Tablet computers were used by children mainly for entertainment purposes. Playing games was most popular, followed by watching short video clips, internet browsing and watching TV programmes/films. Just under one in three parents with a tablet said their child used a tablet for school/college work.

Figure 1.45 Tablet use by children



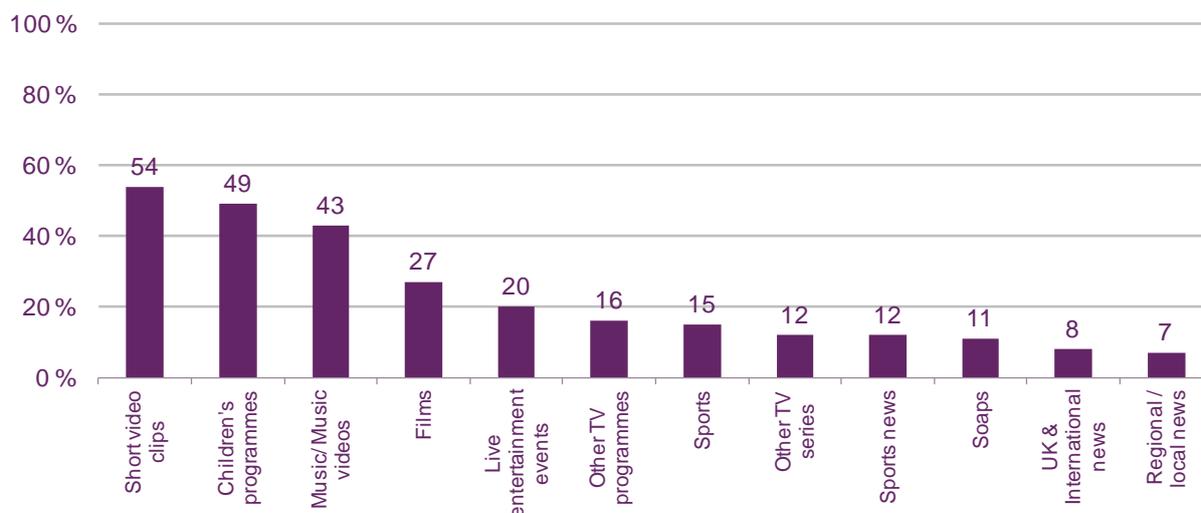
Source: Ofcom online survey 2013

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

Base: Tablet owners with children under the age of 18 years who use parent's tablet computer or another tablet computer in the house (616)

The most popular type of audio-visual content watched by children on a tablet is short video clips, followed by children's programmes and music/music videos.

Figure 1.46 Types of TV programmes and other video content watched by children on a tablet computer



Source: Ofcom online survey 2013

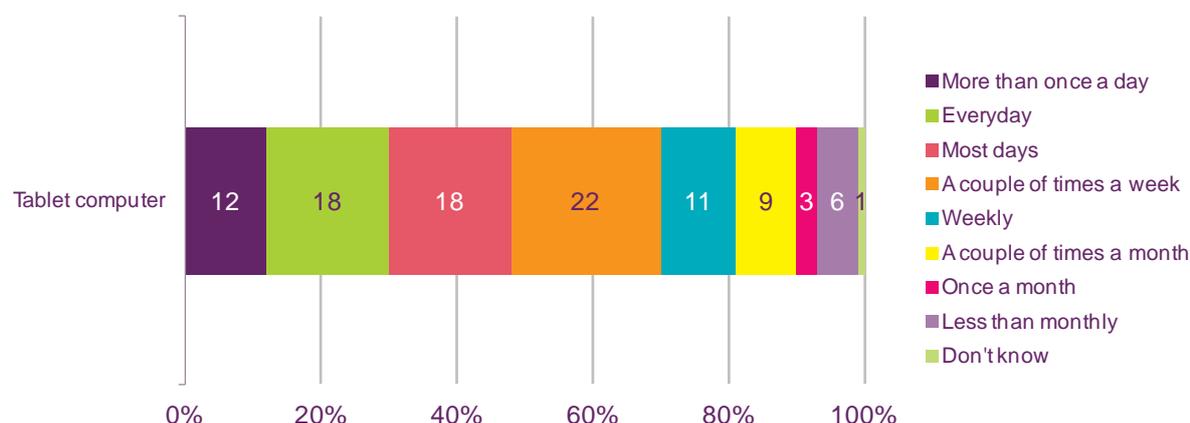
Q. And what types of content are your children watching on their/ your..?

Base: All respondents who own a tablet computer and have children under 18 yrs who watch TV programmes and other types of video content on their/ their own tablet computer (508)

Children who use a tablet for viewing AV content are doing so regularly, with viewing largely taking place either in the main TV room or their bedroom

Children who use a tablet to watch audio-visual content do so regularly, with just under half (48%) of parents reporting their children did this 'most days'.

Figure 1.47 Frequency of children's viewing of AV content on a tablet



Source: Ofcom online survey 2013

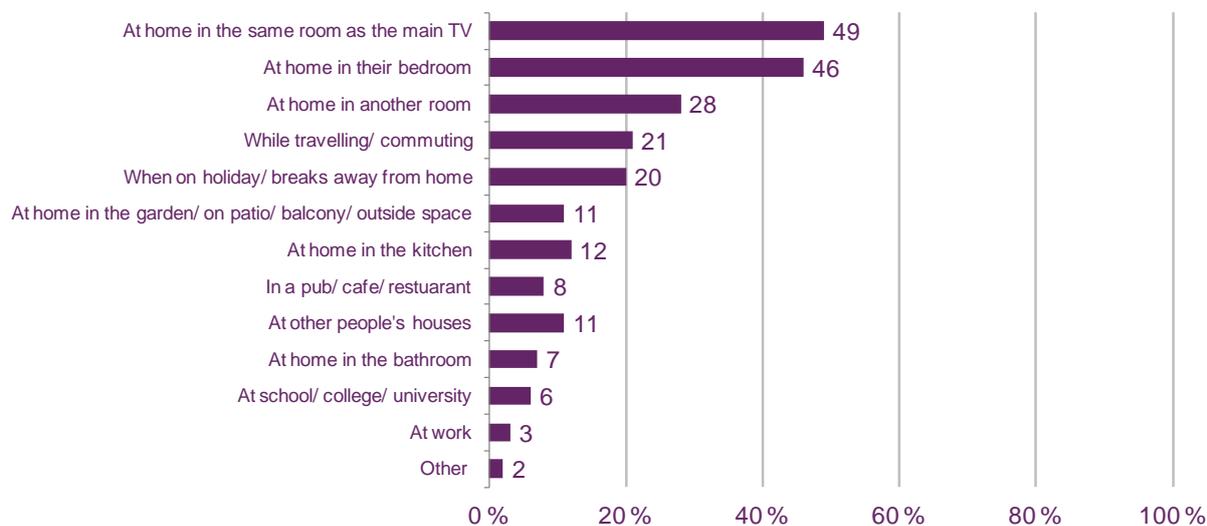
Q. How often do your children watch TV programmes and other types of video content on their/ your..?

Base: All respondents who own a tablet computer and have children under 18 who watch TV programmes and other types of video content on parent's/ their own tablet computer (508)

Despite the mobile nature of tablets, children are using them to watch audio-visual content in the home more frequently than outside the home. The most popular locations are in the same room as the main TV, and in their bedroom.

A fifth of parents whose children watch audio-visual content on a tablet reported that it was used on holidays, and just under one in ten said it was used in pubs/cafes or restaurants.

Figure 1.48 Locations of children’s viewing of content at home on tablet computer



Source: Ofcom online survey 2013

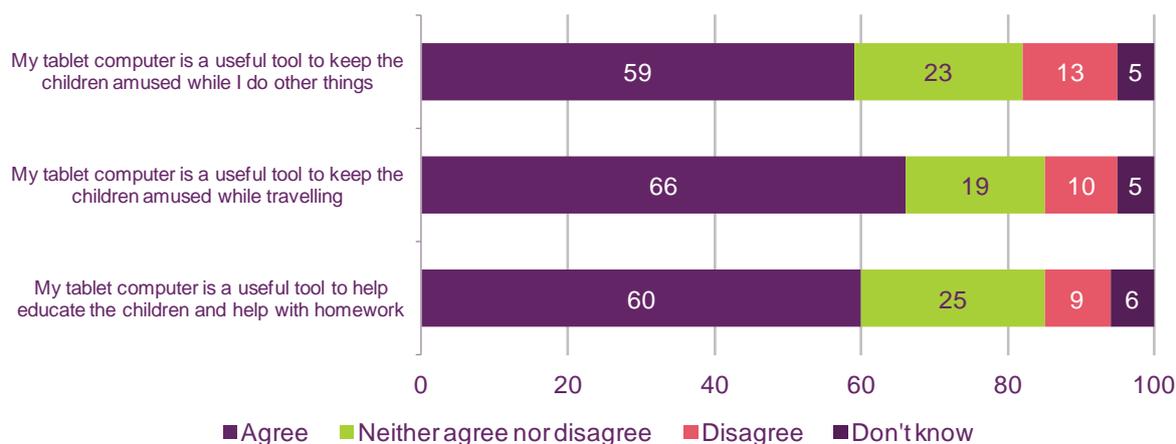
Q. Where are your children watching these types of content on their / your...?

Base: All respondents who own a tablet computer and have children under 18 who watch TV programmes and other types of video content on parent's/ their own tablet computer (508)

Three-quarters (77%) of parents with tablets agree it is a useful device for entertaining and/or educating their children

The majority of tablet owners with children agreed that the tablet is a useful tool for amusing and educating their children, with about three-quarters (77%) of tablet owners with children agreeing to any of these three statements.

Figure 1.49 Tablets as a tool for children



Source: Ofcom online survey 2013

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

Base: All respondents who own a tablet computer and have children aged under 18 (660)

1.6 Web and text-based communications

1.6.1 Introduction

This section of the report summarises the findings of a omnibus survey about the use of communications services in the UK. Face-to-face interviews with 2,971 UK adults aged 16+, took place in March 2013. Wherever possible, we have compared the findings with the results of a similar survey conducted for Ofcom in February/March 2012.

The research was commissioned to understand the breadth of communications methods used by UK consumers, and their preferences for using different ways of communicating in different circumstances. The research found that digital communication methods are now widely used alongside, and in some cases are usurping, traditional methods.

Last year we explored 'the rise in text-based communications', while this year we focus on the use of internet or web-based communications, and the age divide evident in communication preferences. For the purposes of this survey, the types of communication included in each overall category are shown in the table below.

Communication category	Communication methods
Web-based	Email, social networking, instant messaging, micro - blogging, comments on websites/ forums, internet - based voice/ video calls, photo/ video/ audio sharing sites, e-cards
Non web-based	Face to face, text/ SMS, picture messages/ MMS, post, voice calls on mobile, voice calls on landline
Voice based	Face to face, voice calls on mobile, voice calls on landline, internet-based voice/ video calls
Text-based	Text/ SMS, picture messages/ MMS, post, email, social networking, instant messaging, micro-blogging, comments on websites/ forums, photo/ video/ audio sharing sites, e-cards

1.6.2 Key points

- **One in five 16-24s agree that it is OK to start a relationship using text-based services.** Twenty-one per cent of 16-24 year olds agree that it is acceptable to start a relationship through private text-based communication methods (text messages, emails or private messages on social networking sites) and 11% agree that it is acceptable to do this through public communication methods (e.g. posting publicly on social networking sites). Similarly, 30% of 16-24s agree that it is OK to have an argument using private communication methods and 7% agree that it is acceptable to use public communication methods for this. Older respondents were much less likely to consider it acceptable to share this type of information via text-based methods.
- **Web-based text forms are the most popular method of weekly communication among 16-24 year olds (84%) – higher than SMS (80%).** The most popular forms of weekly web-based communication among this age group are social networking (66%) and instant messaging (48%). Individually, each of these methods is used less

than SMS on a weekly basis. Around a third (35%) use micro-blogging sites on a weekly basis.

- **SMS, email, voice calls on a mobile and social networking have declined significantly over the past year as methods of weekly personal communication.** Use of standard text messages and social networking sites each declined by seven percentage points. Similarly, use of email is down by six percentage points on the year. But use of instant messaging has remained stable, with a quarter (26%) of UK adults using this for personal communications on a weekly basis.
- **Instant messaging is having an impact on use of standard text and picture messaging.** Over half (54%) of instant messaging users said these services had reduced the proportion of SMS and MMS they sent. This is consistent with a reduction in standard text message volumes - over the past year the proportion of SMS sent fell from 39.7 billion to 37.1 billion.
- **Price and speed are driving use of web-based communication services.** Among respondents who use web-based communication services (e.g. instant messaging, internet-enabled voice or video calls through services such as Skype), the most commonly cited reason, given by 44% of users, was to communicate more cheaply. This was followed closely by the ability to communicate more quickly/immediately (42%) and to communicate with people not in the UK (39%).
- **16-24s are more likely to use their mobile phone than a computer for Facebook, Twitter and instant messaging.** Respondents were asked which devices they used for their various web-based communications. Younger users are more likely to use a mobile phone than a computer for almost all the digital communication methods asked about. This included social networking (61% vs. 49% respectively); micro-blogging (27% vs. 16%) and instant messaging (51% vs. 36%).

1.6.3 Frequency of communicating with friends and family

Texting is the most popular way of communicating with friends and family, but fewer claim to be sending texts on a daily basis than in 2012

Eighty-four per cent of respondents communicate at least daily with friends and family, unchanged since 2012. Respondents were also asked which methods they used at least once a day to communicate with friends and family. The findings show that, as in 2012, text messages are the most widely-used method.

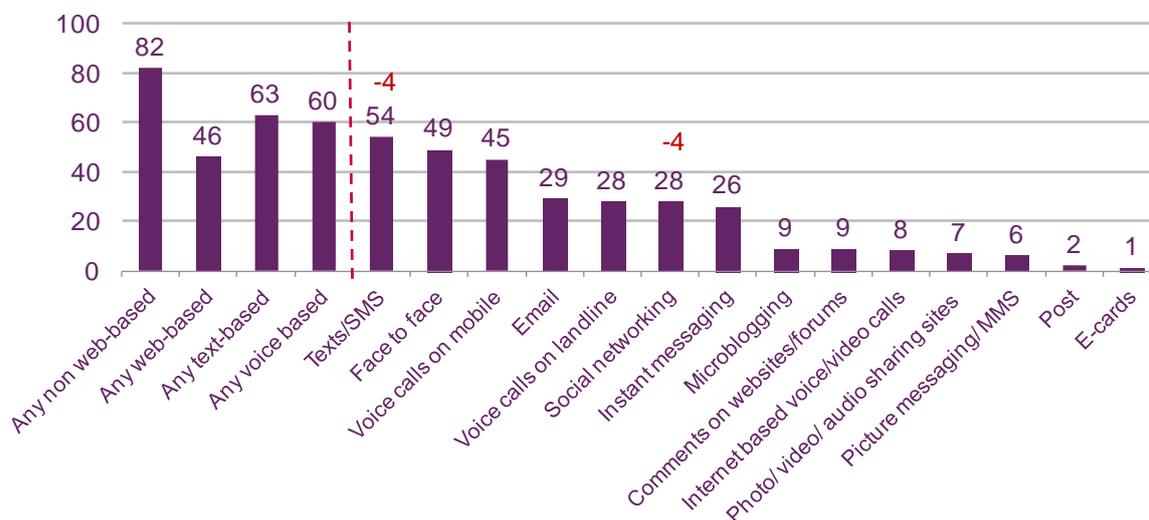
Figure 1.50 shows that over half (54%) stated that they used text messages to communicate with friends and family at least once a day. This is higher than the proportion who claimed to communicate face to face (49%). Voice calls on a mobile were chosen by 45%.

Looking at the overall ways in which people communicate with friends and family on a daily basis, non-web based methods are clearly preferred, with 82% using any non-web based communications method. But just under half (46%) are currently using a web-based method. Use of web-based communications is largely driven by email (29%), social networking (28%) and instant messaging (26%). Use of text-based and voice-based methods of communicating with friends and family are broadly equal (63% and 60% respectively). Due to the decline in 2013 in the use of text messaging and social networking to communicate with friends and family, there is no longer a significant difference between daily use of text-based and voice-based services, as there was in 2012.

While use of text messages has declined since last year (when 58% of respondents claimed to use this method to communicate at least once a day), overall use of web-based methods has remained stable, despite a decline in the use of social networking as a daily method of communicating with friends and family.

Figure 1.50 Methods used at least daily to communicate with friends and family

% UK adults who communicate at least daily with friends and family using each method



Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971)

Q.2A How often do you use [insert statement] to communicate with friends and family?⁸

New codes were added in 2013 for photo/ video/ audio sharing sites, picture messaging/ MMS and e-cards, therefore year-on-year trend is not shown for the summary categories of web/ text/ voice-based services

As in 2012, four in five 16-24 year olds use web-based communications on a daily basis, while use of text messaging declines

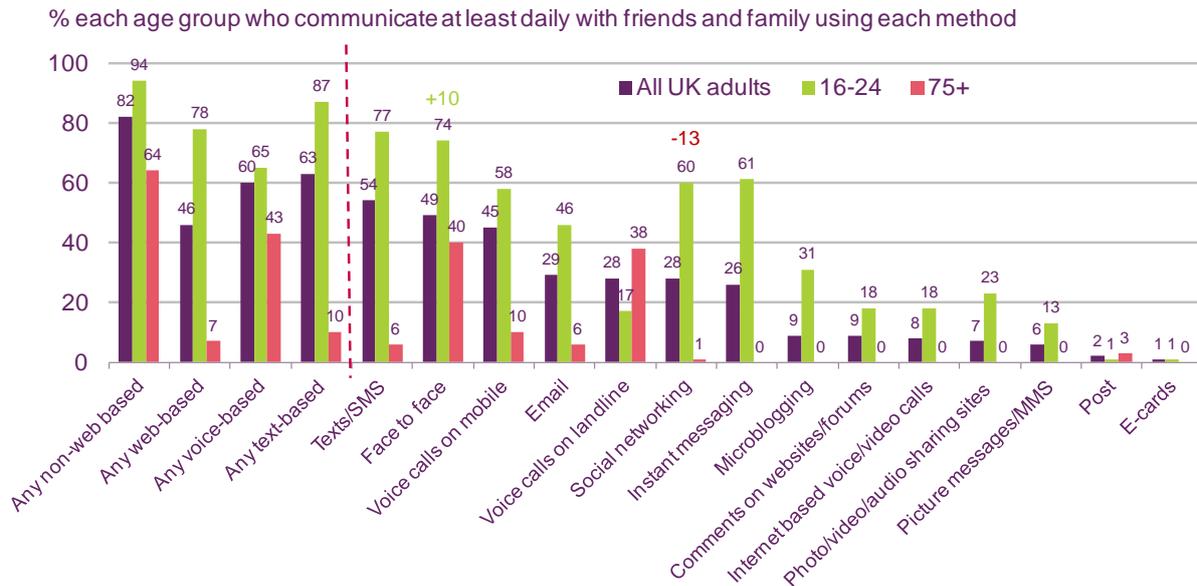
Younger respondents are considerably more likely than older respondents to communicate at least daily with friends and family, with 96% of 16-24 year olds saying they do this, compared to 65% of those aged 75 and over. For both groups this remains unchanged since 2012.

Four in five 16-24 year olds use web-based communications daily; the proportion doing so is unchanged since last year. Three in five say they communicate with friends and family on a daily basis via social networking. Nearly half (46%) use email to communicate with friends and family on a daily basis. Two in five (38%) use instant messaging and 31% use micro-blogging sites like Twitter.

Compared to 2012, 16-24 year olds are significantly less likely to use text messages on a mobile phone at least daily (77% in 2013 compared to 89% in 2012) and to use social networking (60% in 2013 compared to 73% in 2012). They are also significantly more likely to meet face to face (74% in 2013 compared to 64% in 2012).

⁸ While picture messaging can be done using internet-enabled applications, we are including it within our definition of non web-based communications methods as it is primarily referring here to picture messages sent using a mobile phone network.

Figure 1.51 Methods used at least daily to communicate with friends and family: younger and older users



Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971), all 16-24s (N=375), all 75+ (N=365)

Q.2A How often do you use [insert statement] to communicate with friends and family?

New codes were added in 2013 for photo/ video/ audio sharing sites, picture messaging/ MMS and e-cards, therefore year-on-year trend is not shown for the summary categories of web/ text/ voice-based services

Instant messaging is as popular with 16-24 year olds as are fixed line phone calls with the over-75s

Conversely, the over-75s demonstrate a strong preference for non web-based communications. Fixed-line telephone calls and meeting face to face are the joint most popular methods used to communicate daily with friends and family by this age group. These methods are each used by about four in ten (38% and 40% respectively) which is the same proportion of 16-24 year olds who use instant messaging on a daily basis.

The biggest age difference for non web-based communication is for text messaging, with 77% of 16-24 year olds saying they use this method to communicate with friends and family on a daily basis, compared to 6% of those aged 75 and over. Over half (58%) of 16-24 year olds use voice calls via a mobile phone at least daily to communicate with friends and family, compared to 10% of those aged 75 and over.

This age difference is also found in attitudes towards communications. Younger people are more likely than older people to say that new communications methods have made their lives easier (76% of 16-24 year olds versus 23% of those aged over 75) and that they like to keep up with the latest technological trends (61% of 16-24s versus 11% of 75+)⁹.

⁹ Older people are much more likely to disagree with these statements, with 53% disagreeing that new communications have made their lives easier and 76% disagreeing that they like to keep up with technological trends.

Face to face remains the most common form of weekly communication with friends and family, while there has been a decline in communication via social networking sites

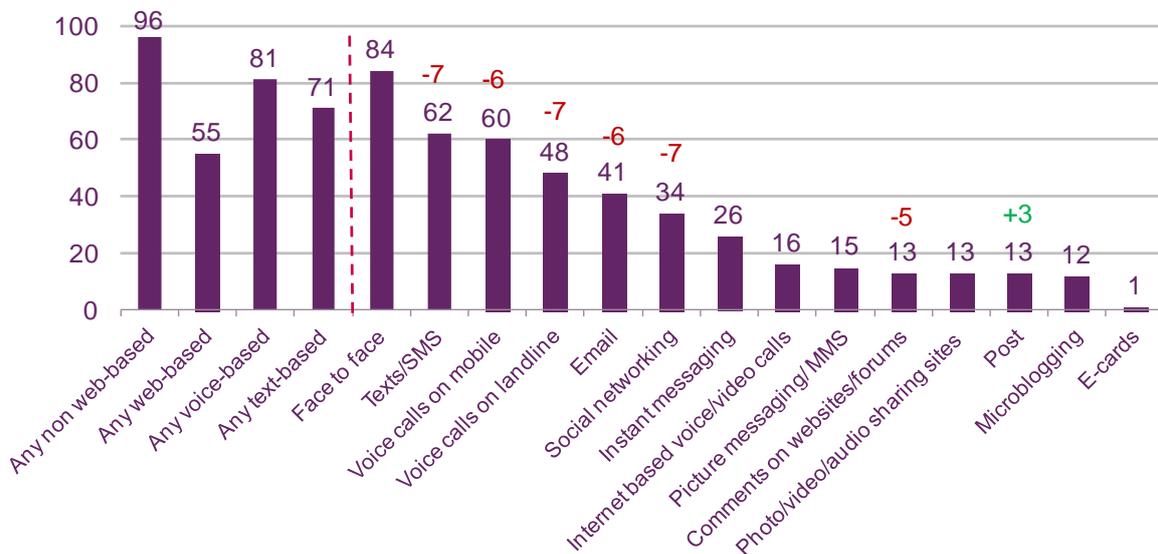
When the timeframe is extended to ‘at least once a week’ the number of respondents who communicate with friends and family increases to 97%, unchanged since 2012, with face-to-face meetings (84%) emerging as the most popular way of communicating with friends and family. Text messages (62%); telephone calls (60% mobile, 48% fixed) and emails (33%) were the next most popular methods. Around a quarter of adults use instant messaging on a weekly basis and around one in ten (13%) use post to keep in touch with friends and family.

While non web-based communications continue to dominate overall, *any* web-based services are used by just over half (55%) of people at least once a week as a way to communicate with friends and family. The use of web-based communication has fallen by seven percentage points since 2012; from 62% to 55%. This decline has been driven by a decline in the use of social networking, email and comments on websites/ forums. Use of other forms of web-based methods remains stable, with 26% using these on a weekly basis – the same proportion that use them daily. Instant messaging is the most popular method..

Use of text messaging at least weekly has also fallen from 69% in 2012 to 62% in 2013, as have voice calls on mobile phones (from 66% to 60%) and on landlines (from 55% to 48%).¹⁰

Figure 1.52 Methods used at least weekly to communicate with friends and family

% UK adults who communicate at least weekly with friends and family using each method



Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971)

Q.2A How often do you use [insert statement] to communicate with friends and family?

New codes were added in 2013 for photo/ video/ audio sharing sites, picture messaging/ MMS and e-cards, therefore year-on-year trend is not shown for the summary categories of web/ text/ voice-based services

¹⁰ While the analysis also shows that there has been a statistically significant rise in the use of post from 10% in 2012 to 13% in 2013, it is possible this is due to some differences in methodology, including the over-sampling of the 75+ age group and rural users.

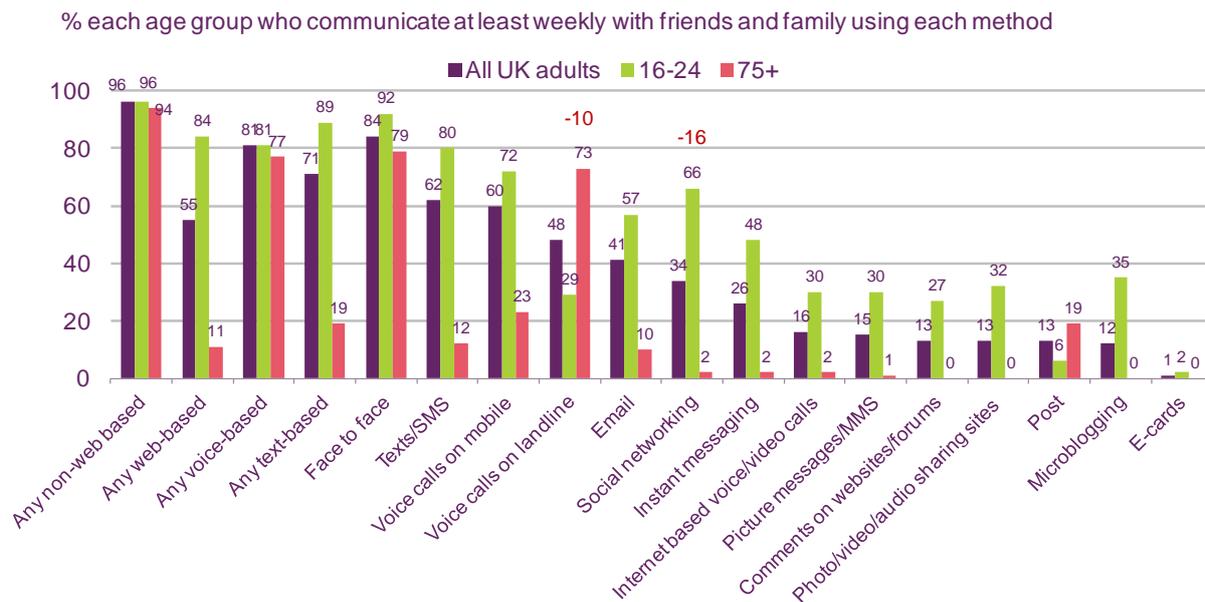
Those aged 75 and over are nearly nine times more likely to choose non web-based than web-based communication with friends and family

The age difference is considerably less marked when we look at those who communicate with friends and family at least weekly, with 99% of 16-24 year olds and 94% of those aged 75+ saying they do this, again unchanged since 2012. But there is still considerable variance in preferences for communication services, with those aged 16-24 much more likely to use text messages, social networking, instant messaging or call on their mobile. On a weekly basis those aged 75+ are more likely to use landline telephony (73%) than those aged 16-24 (29%).

In terms of *overall* use, 84% of 16-24 year olds choose web-based services to contact friends and family each week. Respondents aged 75 and over are nearly nine times more likely to choose non-web-based than web-based communication with friends and family, at 94% and 11% respectively. There is no change in the proportion of either age group using web or non-web-based communication since 2012.

Compared to 2012, 16-24 year olds are significantly less likely to make voice calls on a mobile at least weekly (72% in 2013 compared to 82% in 2012) and to use social networking as a means of communicating with friends and family (66% in 2013 compared to 82% in 2012). There are no significant changes among the 75+ age group.

Figure 1.53 Methods used at least weekly to communicate with friends and family: younger and older users



Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971), all 16-24s (N=375), all 75+ (N=365)

Q.2A How often do you use [insert statement] to communicate with friends and family?

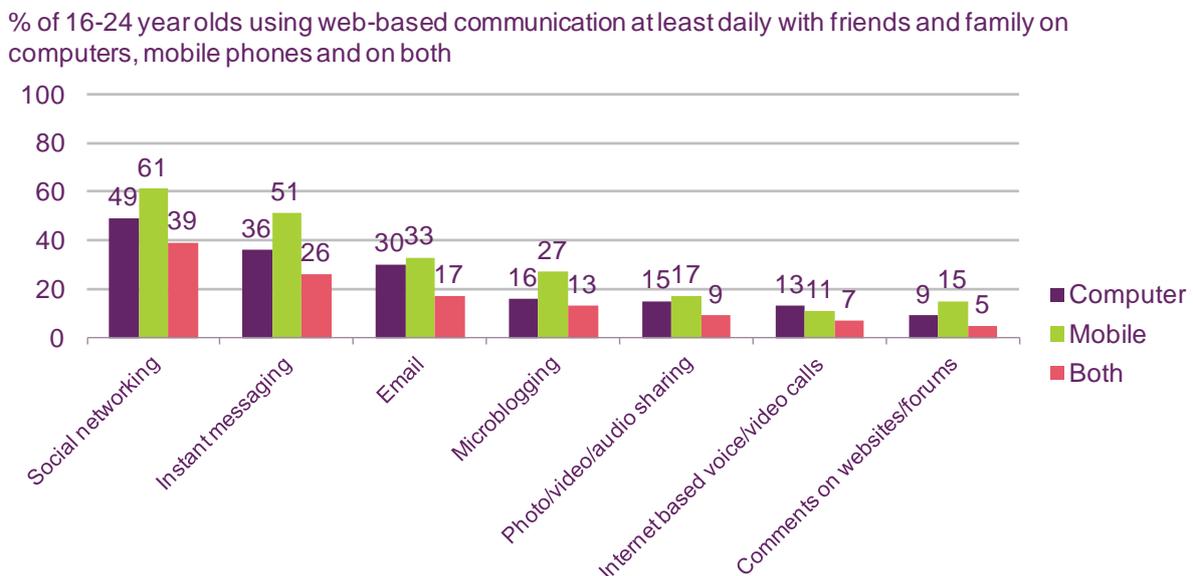
New codes were added in 2013 for photo/ video/ audio sharing sites, picture messaging/ MMS and e-cards, therefore year-on-year trend is not shown for the summary categories of web/ text/ voice-based services

1.6.4 Preferred devices for web-based communication services

16-24s are more likely to use their mobile than a computer for Facebook, Twitter and instant messaging

Where relevant, respondents were asked whether they used the various communication methods using a computer (laptop, desktop, netbook or tablet) or a mobile phone. Overall, UK adults use these services at similar levels on computers and on mobile phones. But younger users are more likely to use a mobile phone than a computer for a range of communication methods, including: social networking (49% of 16-24s communicate using social networking on a computer, compared with 61% using a mobile phone; 39% use both devices to communicate daily via social networks); micro-blogging using sites like Twitter (16% using a computer compared to 27% using a mobile phone); instant messaging (36% using a computer compared with 51% using a mobile phone); and via comments on websites or forums (9% using computer compared with 15% using a mobile phone).

Figure 1.54 Web-based communication on computers, mobile phones, and both, among 16-24 year olds



Source: Kantar Media Omnibus

Base: All 16-24s in UK (N=375)

Q.2A How often do you use [insert statement] to communicate with friends and family?

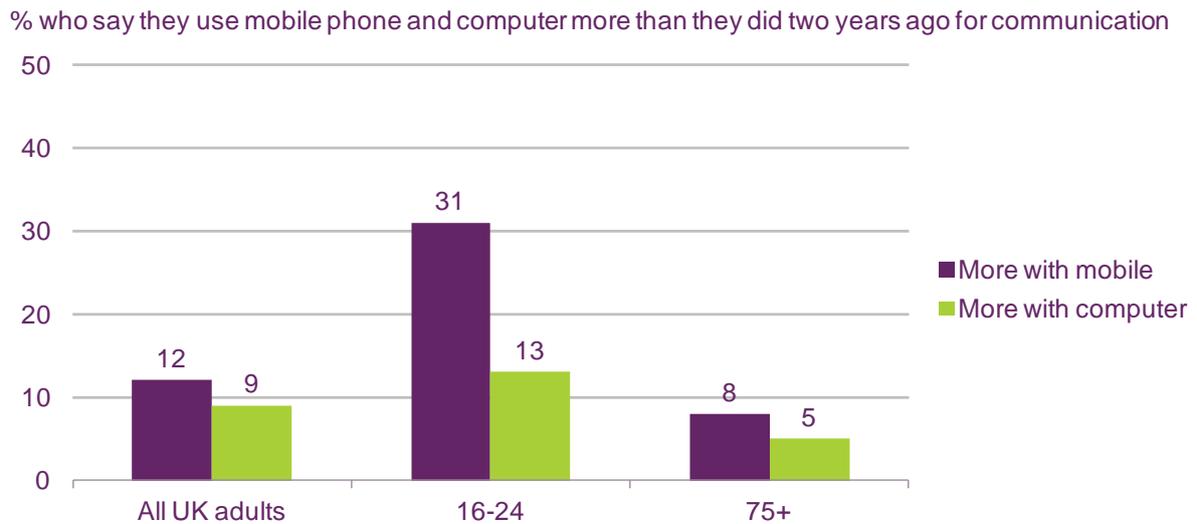
Computers were defined as desktop PC, laptop, netbook or tablet

Use of mobiles for communication has grown more than twice as quickly as use of computers among young people

We asked respondents whether they communicated using computers or mobile phones more or less than they did two years ago. While communication using both methods appears to have increased, the increase is larger for communicating with a mobile than with a computer (12% vs. 9%).

This difference is particularly pronounced among younger users. Thirty-one per cent of 16-24 year olds say that they are using their mobile phone more to communicate than they did two years ago, compared to 13% who say they are using a computer more. Among those aged 75 and over the trend is much less pronounced, with 8% saying they are communicating more using a mobile, and 5% saying they are communicating more using a computer.

Figure 1.55 Net increase in use of mobile and computer for communication



Source: Kantar Media Omnibus

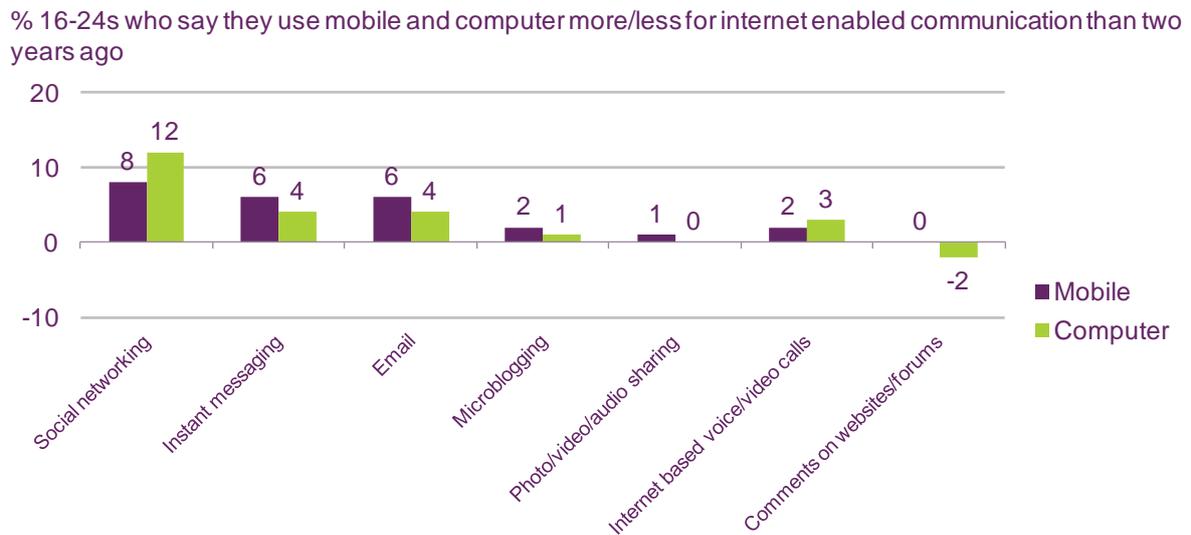
Base: All who use at least one form of communication once a month with friends\ family or businesses, UK adults (N=2959), 16-24s (N=374), 75+ (N=363).

Q.4A Which, if any, of these methods do you use to communicate MORE than you did two years ago? Q.4B And which of them do you use to communicate LESS than you did two years ago? Computers were defined as desktop PC, laptop, netbook or tablet

Web-based communication among younger people is increasing faster on mobiles than on computers

The claimed increase in the use of mobile communication is driven largely by the claimed rise in voice calls and text messages. However, there are also a number of web-based activities that can be undertaken using either a mobile or a computer. In most cases, the growth in these activities among 16-24s has been slightly faster on mobiles than on computers: 6%(net) of 16-24s claim to do more instant messaging using a mobile phone than they did two years ago, compared to 4% (net) who say they do more using a computer; 6% (net) claim to email more using a mobile phone compared to 4% (net) who say they email more using a computer; 2% (net) say they use micro-blogging sites like Twitter more using a mobile, compared to 1% who say they use them more using a computer.

Figure 1.56 Increase in use of internet-enabled communication on computers and mobile phones among 16-24 year olds



Source: Kantar Media Omnibus

Base: 16-24s who use at least one form of communication once a month with friends\ family or businesses (N=374)

Q.4A Which, if any, of these methods do you use to communicate MORE than you did two years ago? Q.4B And which of them do you use to communicate LESS than you did two years ago?

Price and speed are driving use of web-based communication services

We also asked those respondents who use web-based communication services on their mobile phones (e.g. instant messaging or internet-enabled voice or video calls (VoIP) through services such as Skype) what their reasons were for using these services. The most commonly-cited reason, given by 44% of users, was to communicate more cheaply. This was followed closely by the ability to communicate more quickly/immediately (42%) and to communicate with people not in the UK (39%).

This is supported by agreement with attitudinal statements. Sixty-one per cent of respondents agree that they often use the cheapest form of communication possible. This compares to 41% who agree that they “don’t think about the cost when using communication methods, they just use the most convenient”.

Figure 1.57 Reasons for using IP communications



Source: Kantar Media Omnibus

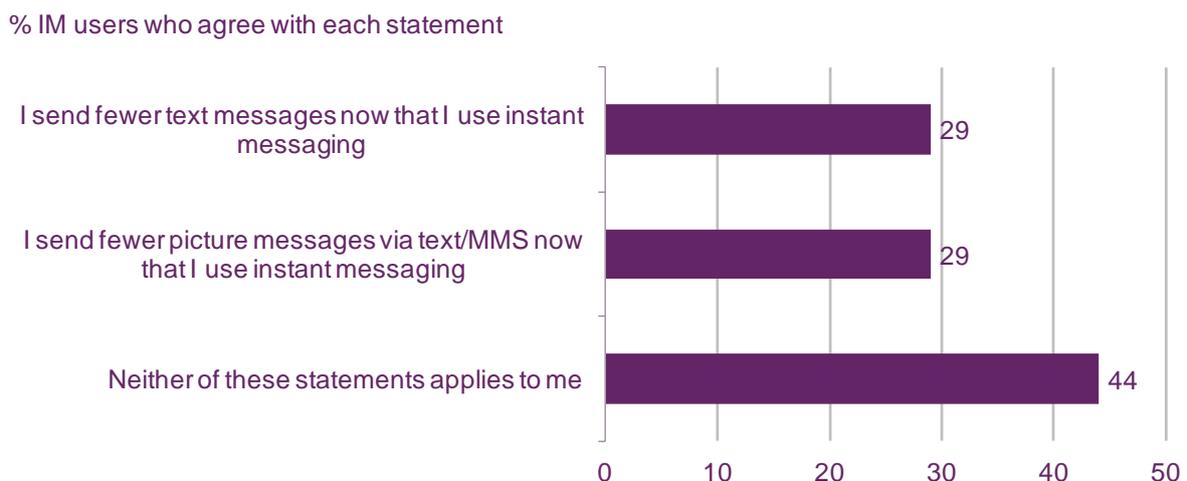
Base All who use internet communication services in the UK (N=1282)

Question: Q.6A You mentioned you use < IP communication method? to communicate. These methods of communication use an internet connection rather than a standard mobile signal. What are your personal reasons for using these communication methods?

Over half of all users are using instant messaging at the expense of text and picture messaging

Respondents who used instant messaging were also asked whether they sent fewer text or picture messages as a consequence. There is some evidence that instant messaging is being used instead of text and picture messaging (SMS/MMS), with 29% of users agreeing that “I send fewer text messages now that I use instant messaging” and 29% also agreeing that “I send fewer picture messages now that I use instant messaging”. In total, 54% of those who use instant messaging on their mobile phones have reduced their use of text and picture messages as a result.

Figure 1.58 Agreement with statements about instant messaging



Source: Kantar Media Omnibus

Base: All that use instant messaging on their mobile in the UK (N=752)

Q.6B And thinking about instant messaging on your mobile phone in particular, which if any, of the following statements apply to you?

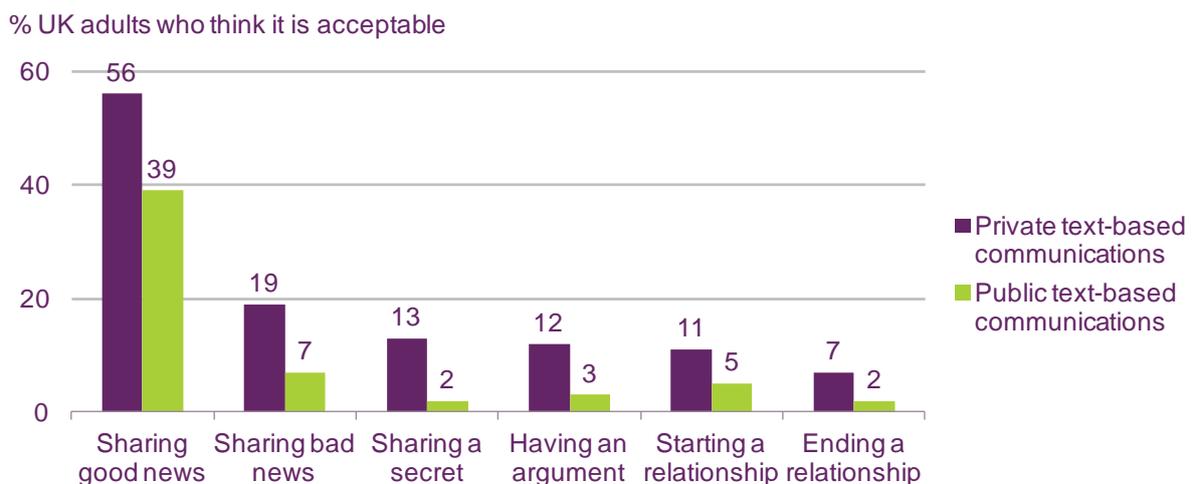
1.6.5 Sharing information using public and private communication methods

Over a third of UK adults agree it is OK to share good news via social networking sites or group instant messages

To further explore attitudes to the use of text and web-based communication, respondents were asked whether there were differences between the types of information it was appropriate to communicate using either private communication methods (such as text messages, emails or a private inbox used as part of a social networking site), or public communication methods (such as posting on social networks or sending instant messages to groups of people). Respondents were asked to give their view on whether it was appropriate to use either of these communication types for: sharing bad news; sharing good news; ending a relationship; starting a relationship; sharing a secret; and having an argument.

Overall, more respondents felt it was acceptable to use private than public communication methods for all of the types of information asked about. Sharing good news had the highest proportion of people who agreed that it was acceptable to use both private communication methods (56%) and public communication methods (39%). Ending a relationship was considered least acceptable to do through private communication methods (7%), and ending a relationship and sharing a secret were also considered least acceptable to do using public communication methods (2% for each).

Figure 1.59 Acceptability of using private and public communication methods to share information



Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971)

Q.5 Which, if any, of the following types of messages, do you feel it is acceptable to use these text based methods for?

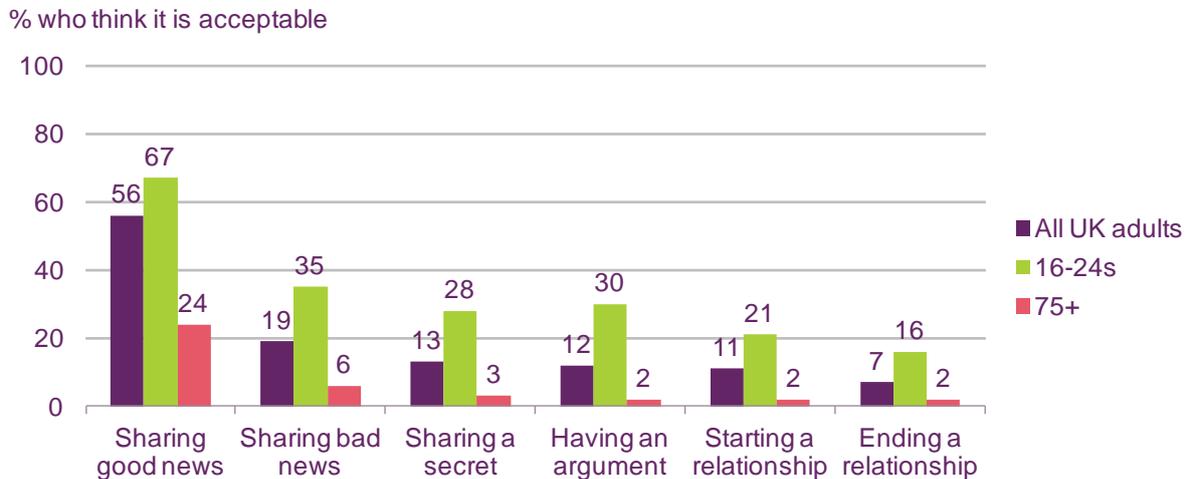
Two in ten 16-24s agree that it is acceptable to start a relationship by text or email

Younger users are significantly more likely than older users to say that it is acceptable to share all of the kinds of information asked about through private communication methods, and to say that it is acceptable to share most of the kinds of information asked about through public communication methods, with the exception of ending a relationship and sharing a secret.

Twenty-one per cent of 16-24 year olds agree that it is acceptable to start a relationship through private communication methods and 11% agree that it is acceptable through public communication methods. This compares to 2% and 1% among those aged 75 and over.

Similarly, 30% of 16-24s agree that it is OK to have an argument using private communication methods, and 7% agree that it is acceptable to use public communication methods. This compares to 2% and 1% of those aged 75 and over.

Figure 1.60 Acceptability of using private communication methods to share information: younger and older users

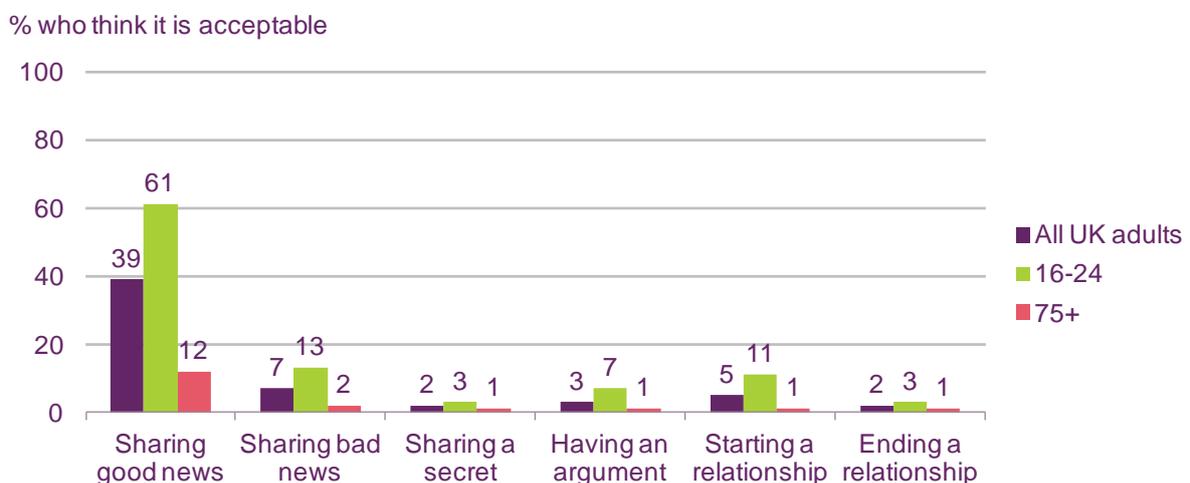


Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971), all 16-24s (N=375), all 75+ (N=365)

Q.5 Which, if any, of the following types of messages, do you feel it is acceptable to use these text based methods for?

Figure 1.61 Acceptability of using public communication methods to share information: younger and older users



Source: Kantar Media Omnibus

Base: All adults in the UK (N=2971), all 16-24s (N=375), all 75+ (N=365)

Q.5 Which, if any, of the following types of messages, do you feel it is acceptable to use these text based methods for?

1.7 TV and internet use among ethnic minority groups

1.7.1 Introduction and structure

The ethnic minority group (EMG) population of the UK is made up of many very different ethnic groups. This chapter uses consumer research to look at a sample of the largest ethnic minority groups in the UK – Pakistani, Indian, Bangladeshi, Black Caribbean and Black African.

Our research assesses how these groups use television and internet services, and explores the differences between the EMG population and the general population of Great Britain¹¹. It first considers the impact of the demographic make-up of these EMG groups, and how this can influence their use of media and communications services, and will then look at take-up and use of these services and attitudes towards them.

The analysis uses data from several years of consumer research and aggregates it. In order to create significant samples of these small sections of society, three years' worth of data was merged together, avoiding duplication and maintaining representativeness by weighting it to the England and Wales 2011 census and population estimates from National Records Scotland. Due to the research data in this section having been compiled over a three-year period, the Great Britain (GB) average presented here is not comparable to figures for GB or UK averages elsewhere in this *Communications Market Report*.

Under the Communications Act 2003, Ofcom is required, in performing its duties, to have regard to the different interests of ethnic minority communities within the UK. A full and detailed report of our findings will be published this summer.

1.7.2 Key points

- **Across the ethnic groups studied, Indian respondents report the highest take-up of broadband, at 82%, compared to the GB average of 71%.** This group has higher-than-average broadband ownership, across the age groups studied. The difference was particularly pronounced among those aged 35+; 77% of Indian respondents in this age group report having broadband at home, compared to 66% across Great Britain as a whole.
- **One in ten 16-34 year olds in the Indian group say they don't watch TV.** A larger proportion of the Indian group said that they did not watch television in the household (7%) compared to the GB population as a whole (1%). Among 16-34 year olds these differences were even greater, with 10% of Indian respondents in this age group not watching television.
- **Most EMGs are less likely than the GB population as a whole to watch recorded television.** Fifty-five per cent of the GB population use recorded TV (TV programmes/ films recorded to view at a later time) while less than half of the EMG groups used this service.
- **Use of on-demand services among EMGs is about the same as the GB average.** Around a third (34%) of each group have used on-demand services (where a

¹¹ We use "Great Britain" here rather than "UK", because our research excluded Northern Ireland

consumer chooses from a selection of programmes/films to watch at any time) such as BBC iPlayer, 4OD, Sky On Demand, LoveFilm or Blinkbox.

1.7.3 Demographic analysis

Demographics may partially explain many of the differences between EMGs and the general population

The EMG population in Great Britain differs from the general population in demographic profile. Although there are considerable variations between individual groups, the EMG population profile compared to all GB adults tends to:

- be clustered in London and major cities;
- be younger;
- be larger in household size;
- be more likely to have children in the household;
- have either very high or very low academic qualifications;
- have higher unemployment rates; and
- have a lower income profile¹².

Some of the differences in use of media and communications services between the EMG and the general population can be attributed to these demographic variations. For example:

- People from EMGs are slightly more likely to have mobile phones (97% compared to 95% of all adults). This may reflect the younger age profile of EMGs, as research shows that younger people are more likely than older people to have mobile phones.
- Although it differs by individual group, people from EMGs are slightly less likely to have a fixed line (82% compared to 88%). People on lower incomes are less likely to have a fixed line and individuals from EMGs, taken together, have lower average incomes than the general population.

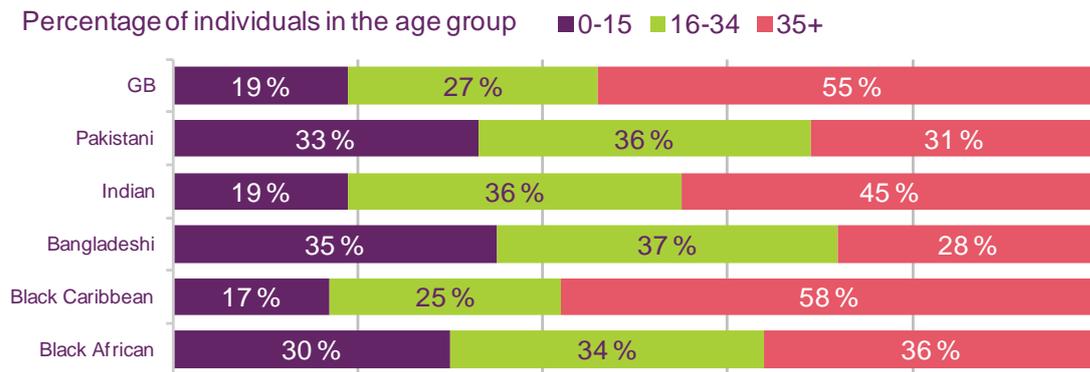
Most EMGs have a younger age profile than the GB population

Age was a relevant factor in the interpretation of findings, as younger individuals tend to be more engaged with new communications devices, more aware of technology and its benefits and more interested in certain digital features than older individuals, regardless of ethnicity.

The Black Caribbean ethnic group was the most similar in age structure to the GB population, as shown in Figure 1.62. The Bangladeshi and Pakistani groups are younger on average and have larger proportions (over 30%) of individuals under 16. The Black African group also has a slightly younger profile than other EMGs, including the Black Caribbean group.

¹² According to 2011 ONS Family Resource Survey: 40% of the Asian: Indian group earned more than £800 a week compared to the 30% of the UK

Figure 1.62 Age distribution, by ethnic group



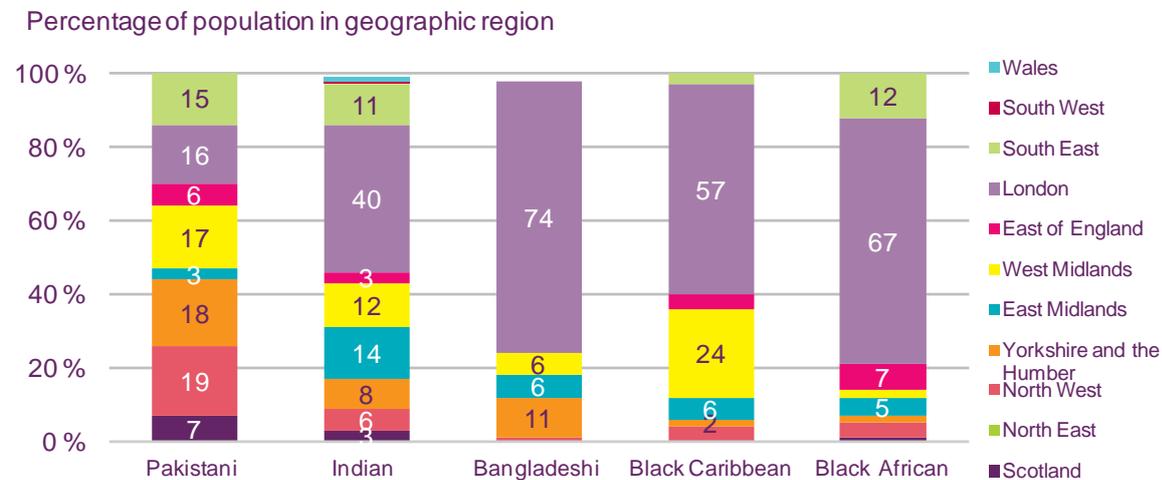
Source: 2011 Census (2011, Office of National Statistics) UK

High proportions of ethnic minority groups live in London

Geography was also a factor in the interpretation of our findings, as urban households tend to be able to connect more readily to communications networks and have greater access to a range of products and services.

Three-quarters (74%) of the Bangladeshi group and two in three (67%) of the Black African group live in London. By contrast, two in five (40%) of the Indian and less than one in five (16%) of the Pakistani groups live in London.

Figure 1.63 Regional distribution of ethnic minority groups



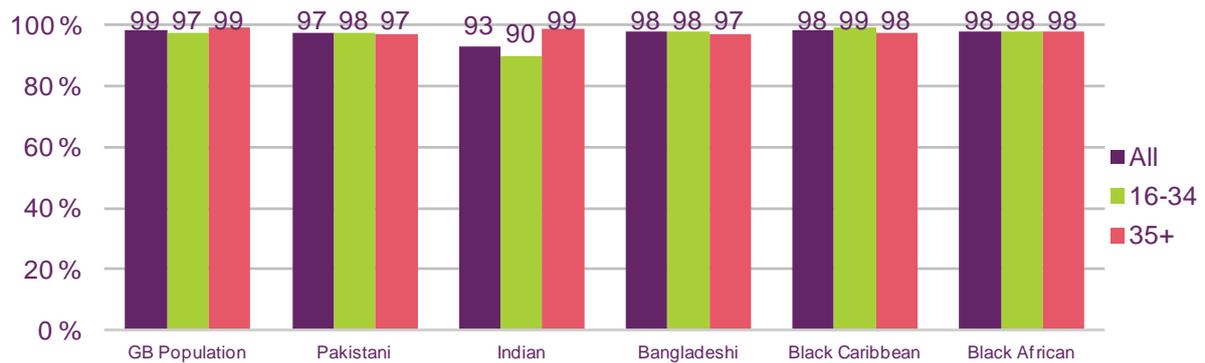
Source: General Lifestyle Survey, Office for National Statistics (2010) GB

1.7.4 Television viewing habits

One in ten 16-34 year olds in the Indian group say they don't watch TV

A larger proportion of the Indian group said that they did not watch television in the household (7%) compared to the GB population as a whole (1%). Among 16-34 year olds these differences were even greater, with 10% of Indian respondents in this age group not watching television.

Figure 1.64 Penetration of watching television



Source: TGI Three Years of Aggregated Data 2009-2012

Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

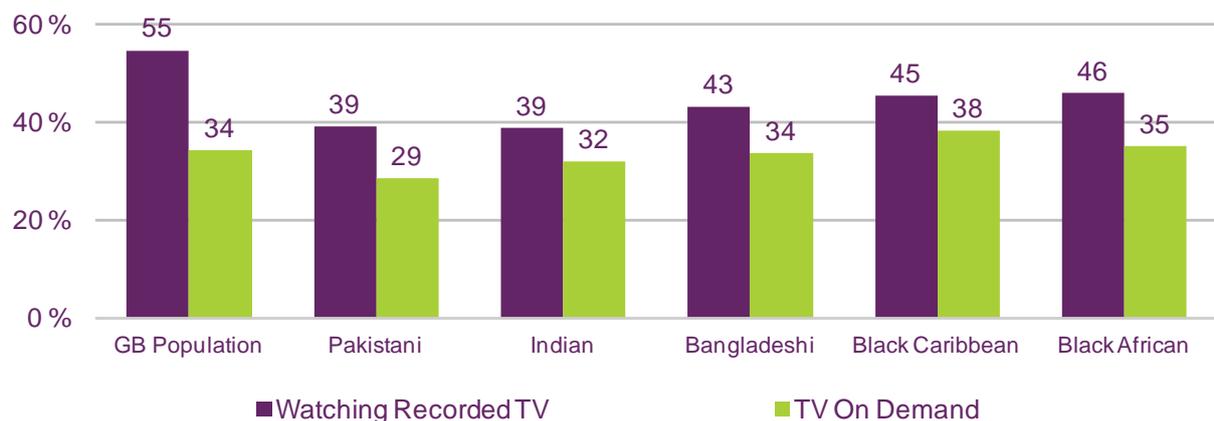
Q: Do you watch television?

Most EMGs are less likely than the GB population average to watch recorded television, but just as likely to use on-demand services

Use of recorded TV among EMGs was lower than among the GB population group. More than half (55%) of the GB population used recorded TV (TV programmes/films recorded to view at a later time) while less than half of the other groups used this service.

Use of on-demand among EMGs is similar to the GB average. About a third of each group has used on-demand services (where a consumer chooses from a selection of programmes/films to watch at any time) such as BBC iPlayer, 4OD, Sky On Demand, LoveFilm or Blinkbox.

Figure 1.65 Recorded and on-demand TV



Source: TGI Three Years of Aggregated Data 2009-2012

Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

Q: Have you watched TV programmes/films in either of these ways in the last 12 months?

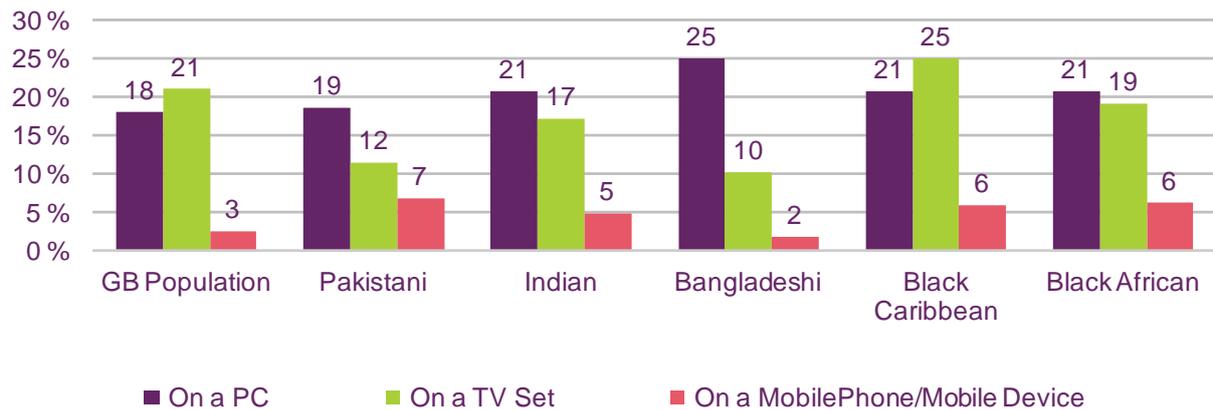
EMGs are more likely to use a PC or mobile to watch on-demand audio-visual content

Larger proportions of EMGs use PCs and mobile to access on-demand content than the overall GB population. While less than one in five (18%) of the GB average as a whole has

used a PC to access on-demand content, a quarter (25%) of the Bangladeshi group have done so. Conversely, this EMG is less likely to watch on-demand content on a TV set.

Among 16-34 year olds, 29% of GB respondents watch TV on demand on a PC, and 24% watch via a television. But among the Black Caribbean population, as many respondents in this age group watched on-demand TV on a PC as on a TV set (29% and 30% respectively). Eleven per cent of 16-34 year olds in the Black Caribbean group watched on-demand on a mobile, compared with 5% of the GB population.

Figure 1.66 TV on demand, by platform

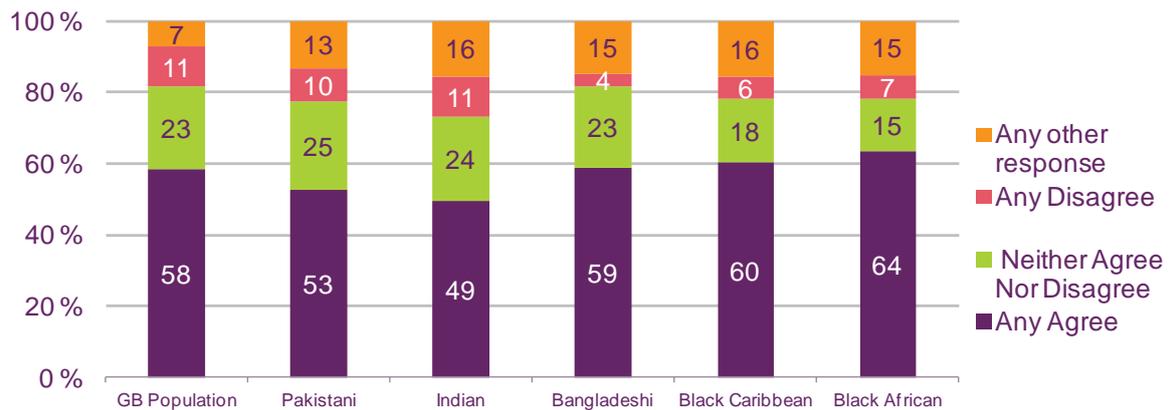


Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517
 Q: Which of these do you use to watch TV on demand?

More than three in five of the Black groups agree that they like the idea of having a large selection of channels

More than three in five of the Black Caribbean and African groups agree with the statement “I like the idea of having a large selection of TV channels” (60% and 64% respectively) compared with 58% of the GB population.

Figure 1.67 “I like the idea of having a large selection of TV channels”



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517
 Statements: I like the idea of having a large selection of TV channels

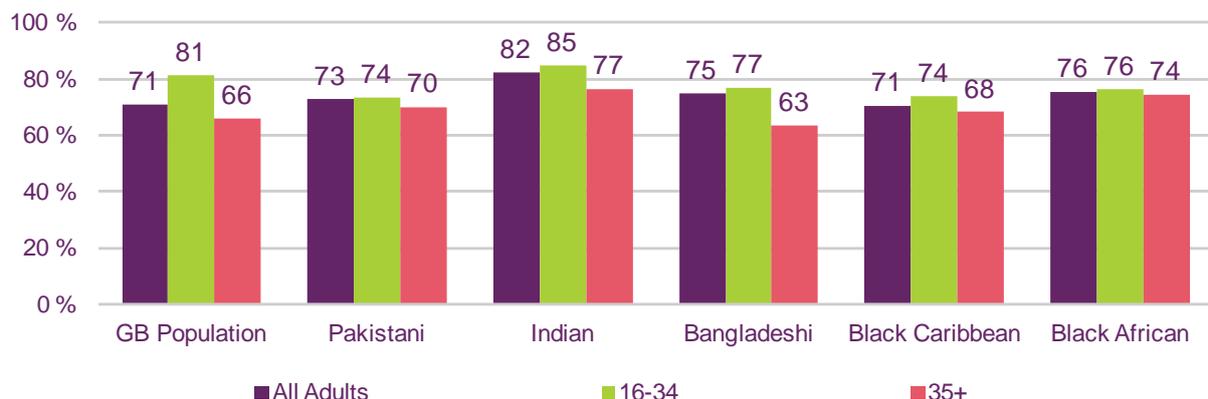
1.7.5 Take-up and use of the internet

Seventy-seven per cent of Indian respondents aged 35 and older report having broadband at home, compared to 66% of the GB population

Broadband take-up among most EMGs is higher than in the GB population as a whole. The Indian group has the highest levels of broadband penetration, at 82%, compared to 71% of the GB population. This EMG reports higher than average broadband ownership in both reported age groups.

Eighty-five per cent of 16-34 year olds in the Indian group have a broadband connection, compared to 81% of those in this age group across GB. Seventy-seven per cent of the Indian group aged 35+ have a broadband connection – 11 percentage points higher than the GB average for this age group.

Figure 1.68 Take-up of broadband



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517
 Q: Which type of connection do you have at home?

One in ten Pakistani, Bangladeshi and Indian respondents claim to use WiFi hotspots regularly

Over a quarter of respondents in the Indian, African groups reported using WiFi hotspots either occasionally or regularly. Seventeen per cent of the Black Caribbean group used the same technology, compared with 19% of respondents across Great Britain. The Pakistani, Indian, Bangladeshi and African groups were the most likely to claim to use WiFi hotspots regularly – with one in ten reporting this, compared to 4% of the GB population.

Figure 1.69 Using WiFi hotspots



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

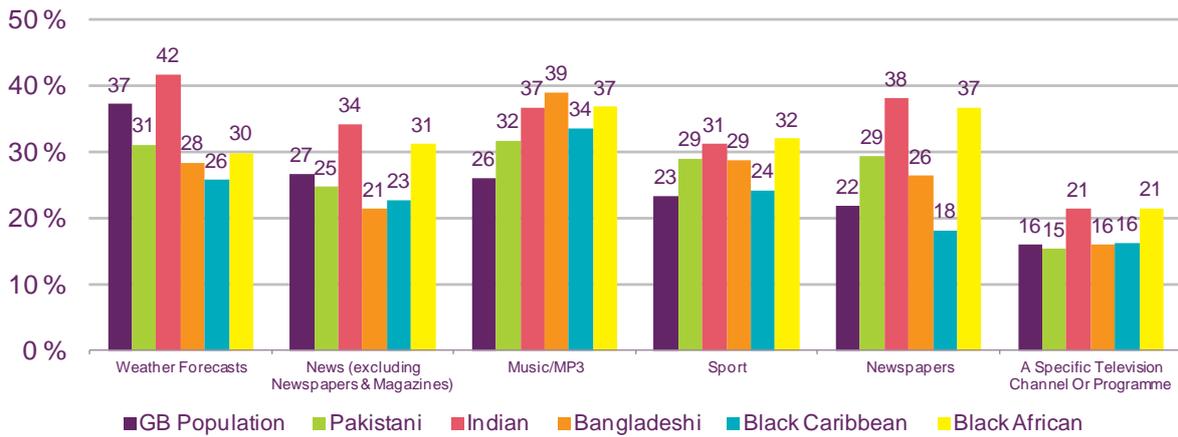
Do you connect to wireless hotspots (located in cafes trains, airports etc.)?

Almost four in ten Indian respondents browse newspaper sites online

Higher than average proportions of respondents from the Indian group and Black African group reported visiting news sites (at 34% and 31% respectively); this compares to 27% of respondents across GB who reported looking for news (excluding newspaper sites) on the internet.

Thirty-eight per cent of the Indian group visit newspaper websites on the internet, compared to 22% of Great Britain. Similarly, 37% of the Black African group visit newspaper sites.

Figure 1.70 Types of websites visited



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

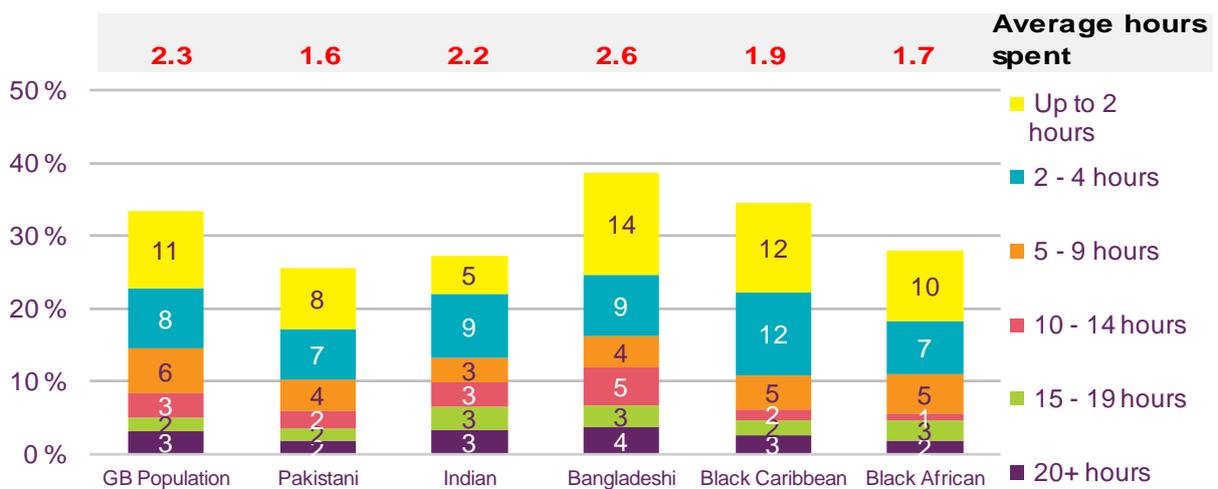
Which sites do you visit (ever)?

Among 16-34 year olds, Bangladeshi respondents spend the most time playing online games

A third of 16-34 year olds across Great Britain claim to spend time playing video games online each week. This is more than most EMGs except the Black Caribbean and Bangladeshi groups, where 35% and 39% spend time playing games online. The Bangladeshi respondents claimed to spend the most time playing games online, at 2.6 hours on average per week.

In contrast, a quarter of the Pakistani and Indian groups (26% and 27% respectively) and 28% of the Black African group report playing games online.

Figure 1.71 Time 16-34 year-olds spent playing online games via a games console or PC



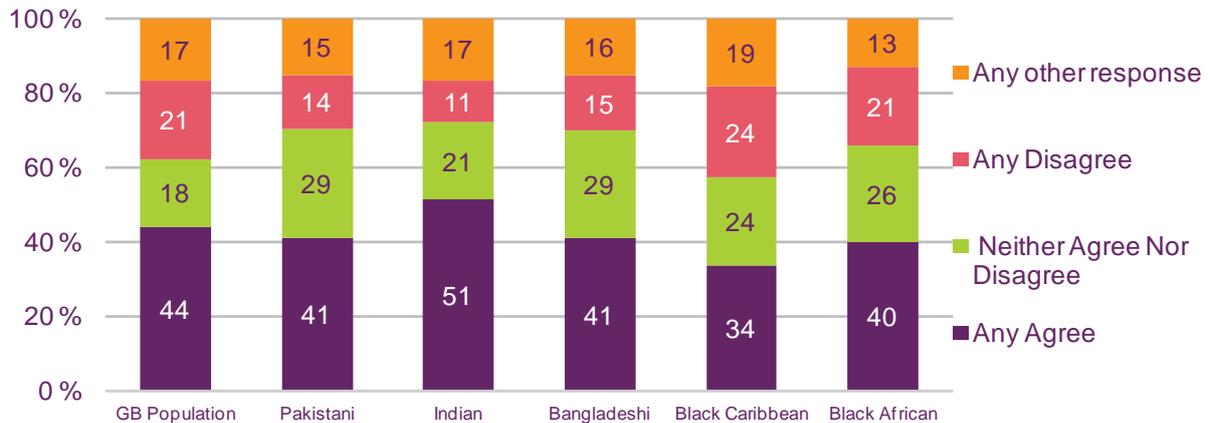
Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

Q: How many hours do you spend playing games ONLINE on a console or PC? (Per week)

A third of Black Caribbean respondents refer to the internet before making a purchase

Around half of the Indian group (51%) say they often refer to the internet before making a purchase. Only a third (34%) of the Black Caribbean group say they do research on the internet before making a purchase.

Figure 1.72 “I often refer to the internet before making a purchase”



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012

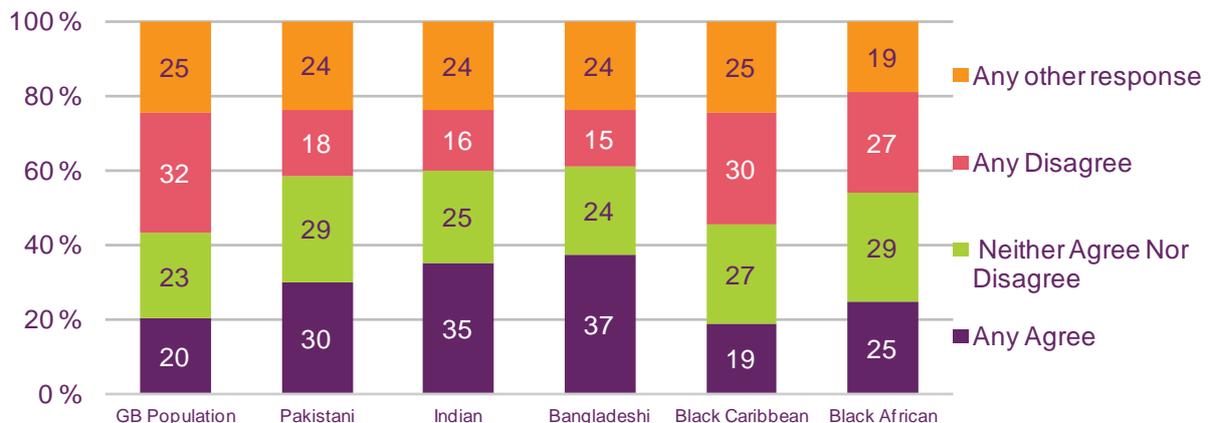
Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

Statements: I often refer to the Internet before making a purchase

Respondents from the Asian EMGs are most likely to report being influenced by online comments and reviews

While one in five respondents across Great Britain agree that they tend to be influenced by comments and reviews online posted by other internet users, around a third of the Bangladeshi, Indian and Pakistani groups (37%, 35% and 30% respectively) say that they tend to be influenced by online comments and reviews.

Figure 1.73 “I tend to be influenced by comments/reviews posted online by other internet users”



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012

Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

Statements: I tend to be influenced by comments/reviews posted online by other Internet users

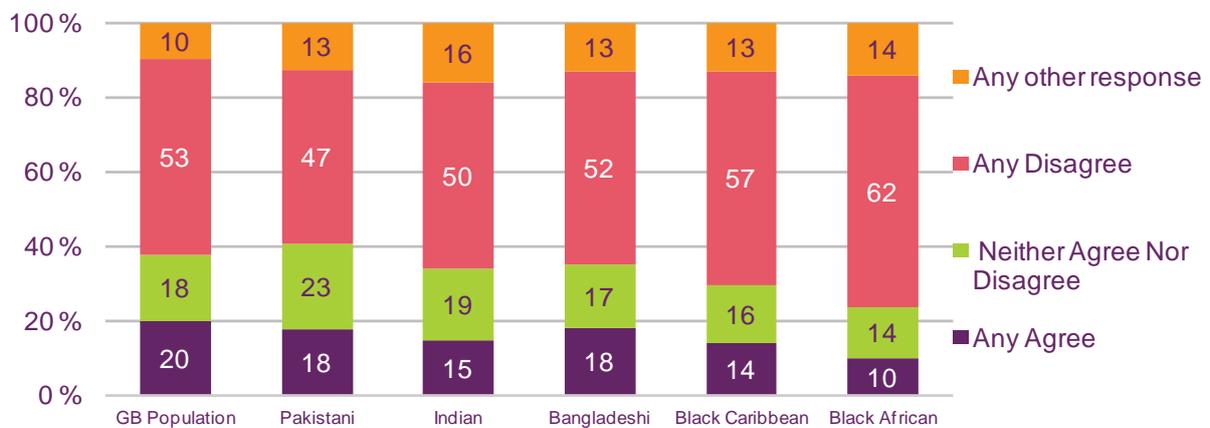
1.7.6 Attitudes towards technology

Black African respondents were the least likely to say that computers confused them

In general, similar proportions of EMGs disagreed that “computers confuse them and that they will never get used to them”, when compared to the GB population as a whole. However, among the EMG groups, there was some variation; the Black African population was most at ease with computers, with 62% disagreeing with the statement that computers confuse them, compared to just under half of the Pakistani group.

Among 16-34 year olds, smaller proportions of respondents from the Asian groups disagreed that computers confuse them. Compared to the 65% of 16-34s in Great Britain who are not confused by computers, only around half of 16-34 year olds in the Bangladeshi (53%), Indian (53%) and Pakistani (51%) groups disagreed with this statement.

Figure 1.74 “Computers confuse me, I'll never get used to them”



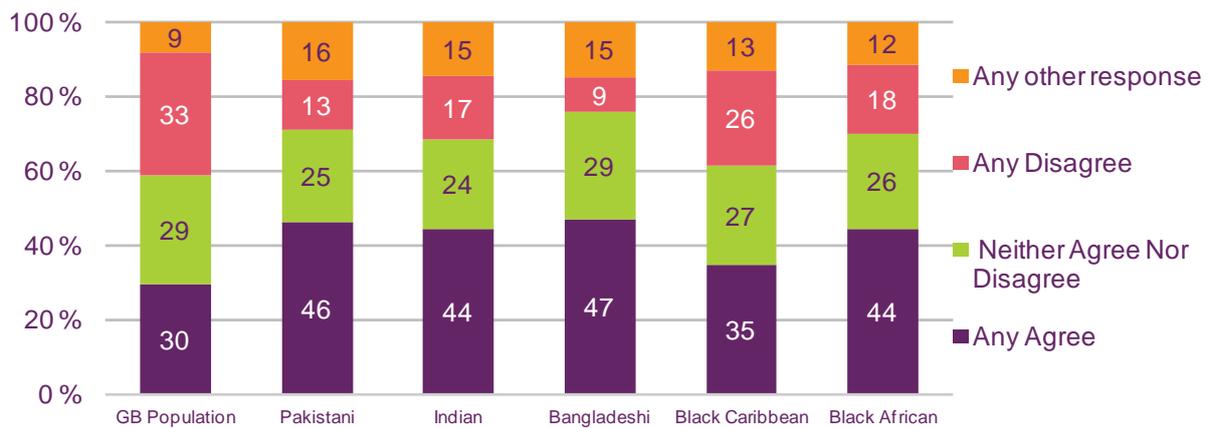
Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517
 Computers confuse me, I'll never get used to them

EMG respondents were more likely than the GB population to agree that they love to buy new gadgets and appliances

While 30% of adults in Great Britain agreed that they love to buy new gadgets and appliances, higher proportions of the Bangladeshi, Pakistani and Black African groups (47%, 46% and 44% respectively) agreed with this statement.

Among 16-34 year olds in Great Britain, 44% said that they love to buy new gadgets and appliances, compared to more than half (53%) of 16-34 year olds in the Black African group.

Figure 1.75 “I love to buy new gadgets and appliances”



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

Statements: I love to buy new gadgets and appliances

Respondents from Asian and Black African groups are more likely to agree that it is important for their household to be equipped with the latest technology

Larger proportions of EMGs agree with the statement: “it is important to have my house equipped with the latest technology”, than the GB population. While 20% of the GB population agree with the statement, 47% of the Indian group and 45% of the Black African group agree. Similarly, among 16-34 year olds, while three in ten (31%) 16-34 year olds in Great Britain agree with the statement, more than half (52%) of 16-34 year olds in the Indian Asian group agree.

Figure 1.76 “It is important my household is equipped with the latest technology”



Source: Kantar TGI Three Years of Aggregated Data July 2009 - December 2012
 Base: All 72,218; Pakistani 526; Indian 870; Bangladeshi 166; Black Caribbean 398; Black African 517

Statements: It is important my household is equipped with the latest technology

1.8 UK cities' communications markets

1.8.1 Introduction

This section sets out comparative data relating to communications markets across a selection of the UK's cities in 2013.

The section reports on a 'deep dive' study of communications service availability and take-up across a number of the UK's cities, using data from Analysys Mason, the Ofcom *Infrastructure Report 2012*, and the British Population Survey.

The world's urban population is expected to double over the next 30 years. Already 80% of the United Kingdom population live in urban areas and 60% of jobs are accounted for in UK cities.¹³ At the same time, communications technology is becoming increasingly important to the economic, social and environmental sustainability of cities. The extent to which cities can access and use such technologies may have an important impact on their future economic, social and environmental success.

In 2011, the government set aside £100m for an Urban Broadband Fund (UBF) to help create up to ten 'super-connected' cities across the UK. The project is focused on increasing access to superfast broadband, and extending areas of public WiFi access. This was followed in 2012 by a further fund of £50m for a 'second wave' of cities to benefit from the programme.¹⁴

In its 2013/14 Annual Plan, Ofcom committed to undertake further research into the effect of communications infrastructure availability on high-density areas, including cities and towns. We will use this research, together with the conclusions of our work on the availability of communications services in the nations, which we published on 16 May 2013¹⁵ and which looked primarily at the provision of services in rural areas, to help us understand the needs of different parts of the UK regarding communications services, how the market has delivered, and the impact of selected public interventions.

1.8.2 Summary of key findings

- **All of the 11 cities in our study have excellent access to basic broadband services.** The availability of first-generation broadband infrastructure provided by BT was found to be universal across all the cities assessed. However, in the cities covered, an average of 5.5% of premises cannot connect to a service faster than 2Mbit/s, with the highest proportion in Derry-Londonderry, Cardiff, and Inverness. London has by far the highest in terms of absolute numbers (nearly 111,000 premises).
- **In the majority of cities, the current availability of next-generation access (NGA) services from either BT and/or Virgin Media is greater than 80%.** The exceptions to this are Glasgow and Inverness, although planned increases in availability in Glasgow will take the city above the 80% mark in the near future. Inverness will also benefit from the Highlands and Islands Enterprise (HIE) £146 million investment in broadband. Derry-Londonderry's exceptionally high figure

¹³ <http://www.centreforcities.org/assets/files/2011%20Research/11-04-19%20Key%20city%20stats.pdf>

¹⁴ <https://www.gov.uk/government/policies/transforming-uk-broadband/supporting-pages/investing-in-super-connected-cities>

¹⁵ <http://stakeholders.ofcom.org.uk/market-data-research/market-data/economic-geography/>

reflects the marked effect of the public-sector intervention that has driven availability to 99%, the highest of any city.

- **The availability of WiFi hotspots varies considerably across cities, and is often greater in smaller cities.** Bangor and Inverness are particularly well served in terms of hotspots per head, despite having a smaller number in absolute terms. The high figure for Bangor may be due to its large student population.
- **All cities have good 3G mobile coverage, and most are covered by all four operators.** In all cities except Bangor and Derry-Londonderry, all four competing 3G mobile networks provide coverage to the vast majority of premises (98% or more). Only one city, Derry-Londonderry, has premises which are not covered by any mobile operators, although this affects only 2% of premises.
- **Glasgow and Birmingham have below average internet take-up.** Glasgow has a significantly lower percentage of individuals accessing the internet (57%), by any means, than all other cities and Great Britain as a whole. Attitudinal rather than demographic differences may partly explain the lower take-up of broadband in Glasgow. People in Birmingham also have significantly lower internet access than the other cities (76%).

1.8.3 Background and methodology

Data on communications service availability

As part of this research, Ofcom commissioned 11 case studies of UK cities, identifying the availability of communications services and the factors driving this. The relevant cities are listed below, and were chosen to represent a range of urban populations and business profiles across the UK.

- **England:** London, Birmingham, Manchester, Cambridge, Exeter
- **Scotland:** Glasgow, Inverness
- **Wales:** Cardiff, Bangor
- **Northern Ireland:** Belfast, Derry-Londonderry.

While some of the key findings of the report are highlighted in this section, the full Analysys Mason report can be found on Ofcom's website¹⁶.

Data on communications service take-up

Having considered the availability of communications services, this section assesses how take-up of telecommunications services varies across cities in Great Britain, using data from the British Population Survey (BPS). This explores telecommunications access across these cities and considers whether demographic variables continue to explain at least part of the difference.

The BPS asks consumers about mobile and landline telephone, internet, and fixed broadband, and comprises around 2,000 face-to-face, in-home interviews with adults (aged 15+) every week, allowing detailed regional and sub-demographic analysis.

Using data from the BPS April 2012 to March 2013, analysis was conducted on the some of the largest UK cities:

¹⁶ <http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr13/cities-report.pdf>

- England: Inner and Outer London, Bristol, Brighton, Birmingham, Leeds, Liverpool, Manchester and Newcastle
- Scotland: Glasgow
- Wales: Cardiff

These cities differ slightly from those studied in the previous section, as it was not possible to obtain data for the smaller cities in the study.

The BPS uses a different methodology to Ofcom’s Technology Tracker (used elsewhere in this report) in that quotas and the wording of questions are different. In addition, key statistics such as mobile and tablet take-up are household-based rather than individual. As such, the two data sources should not be compared. The BPS data allows comparisons to be made between ownership in different cities in Great Britain.

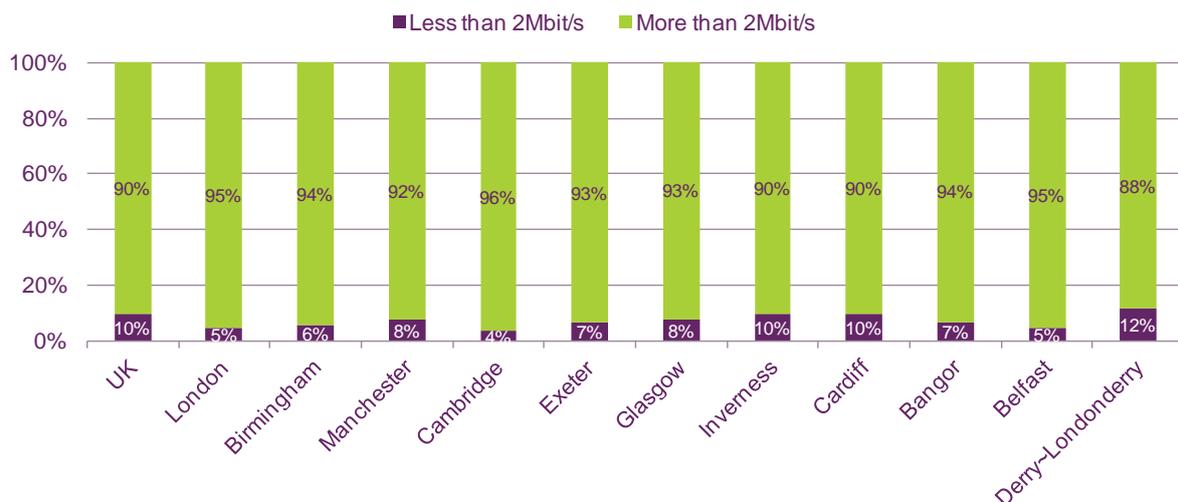
1.8.4 Availability of communications services in UK cities

All the cities assessed have excellent access to basic broadband services, but a small proportion of premises are unable to receive a speed faster than 2Mbit/s

The availability of first-generation broadband infrastructure (both ADSL copper and its rate-adaptive variant ADSL Max copper), provided by BT, was found to be universal across all the cities assessed.

However, a number of premises in each city receive a speed of less than 2Mbit/s, even in large populous centres such as London, Birmingham and Manchester. The variation in the percentage of lines with speeds of less than 2Mbit/s, the minimum speed defined for basic broadband¹⁷, is relatively small, ranging from a maximum figure of 11.7% (Derry-Londonderry) to a minimum of 4.3% (Cambridge), with an average value of 5.5% for the 11 cities. The average value for the UK as a whole is 10%. This distribution of values is predominantly due to the variation in length of copper loops in the access network.

Figure 1.77 Proportion of lines with speeds less/greater than 2Mbit/s



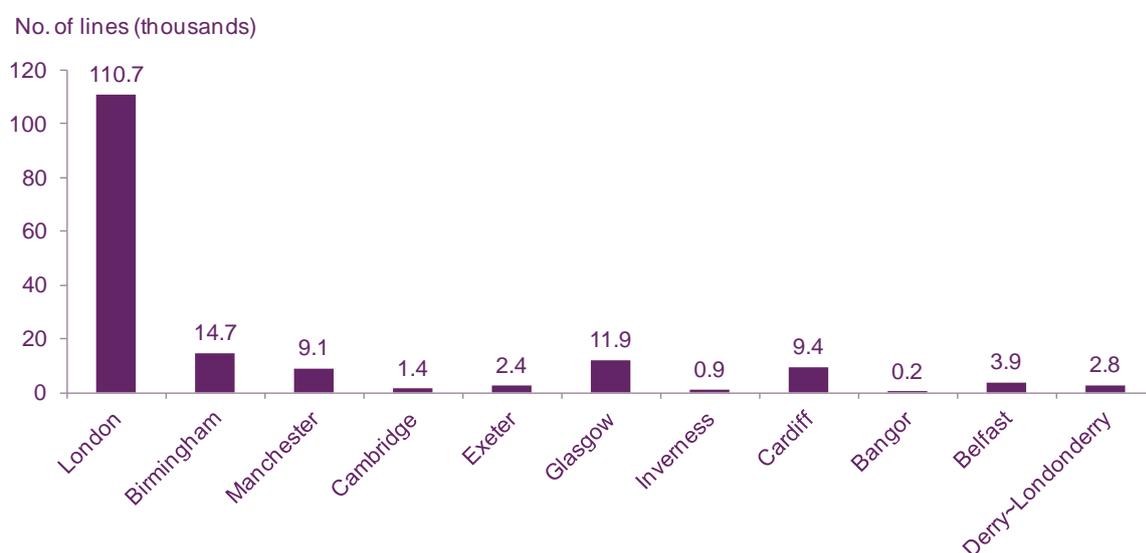
Source: Analysys Mason, Ofcom Infrastructure Report 2012

¹⁷ The speed of the connection depends on the physical conditions of the communications channel. A key factor is the length of the copper access connection.

However, in terms of the absolute number of lines less than 2Mbit/s, there is a much greater variation across the 11 cities. This is most evident in the larger cities. For example, London has one of the lowest percentages of lines less than 2Mbit/s, but by far the highest in terms of absolute numbers (nearly 111,000 premises) and this reflects to some extent the relative size of each of these cities.

The presence of slow fixed lines in every city may be mitigated to some degree by the fact that coverage by 3G mobile networks is 100% of the population in all cities except Derry-Londonderry (as seen in Figure 1.85 later in this section). Even in this case, only 2% of premises do not receive any 3G mobile coverage. The ubiquity of mobile coverage mitigates to some extent the impact of the slow fixed lines. However, consumers appear at present to consider mobile broadband access to be complementary to, rather than generally a substitute for, fixed broadband access¹⁸, and mobile broadband speeds are likely to be much slower.¹⁹

Figure 1.78 Number of lines less than 2Mbit/s



Source: Analysys Mason, Ofcom Infrastructure Report 2012

In the majority of cities, availability of next-generation access (NGA) services from BT and/or Virgin Media is in excess of 80%

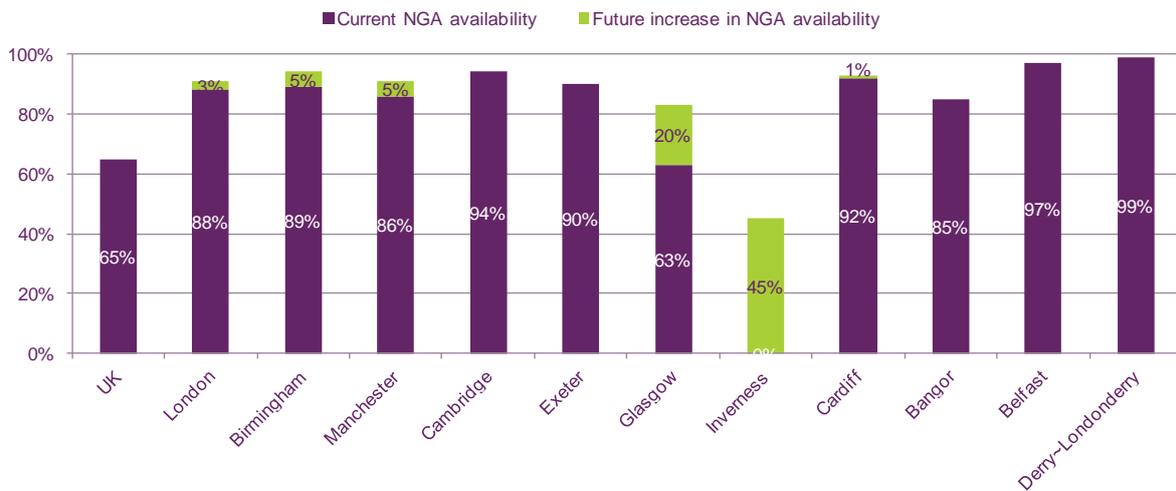
Current availability of NGA infrastructure is over 80% for all the cities reviewed, with the exception of Glasgow and Inverness, although planned increases in availability in Glasgow will take the city above the 80% mark in the near future. Inverness will also benefit from the Highlands and Islands Enterprise (HIE) £146 million investment in broadband across the Highlands and Islands, which upon completion will provide access to fibre broadband to 84% of Highlands and Islands homes and businesses.

Derry-Londonderry's exceptionally high figure reflects the marked effect of the public-sector intervention that has driven availability to 99%, the highest of any city in the survey.

¹⁸ Ofcom's fuller provisional assessment of this matter is referred to in, for example, our *Fixed Access Market Review* consultation document at <http://stakeholders.ofcom.org.uk/binaries/consultations/fixed-access-market-reviews/summary/fixed-access-markets.pdf>

¹⁹ <http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/broadband-speeds/main/mobile-bb-10>

Figure 1.79 Estimated current and future availability of NGA infrastructure from BT and/or Virgin Media

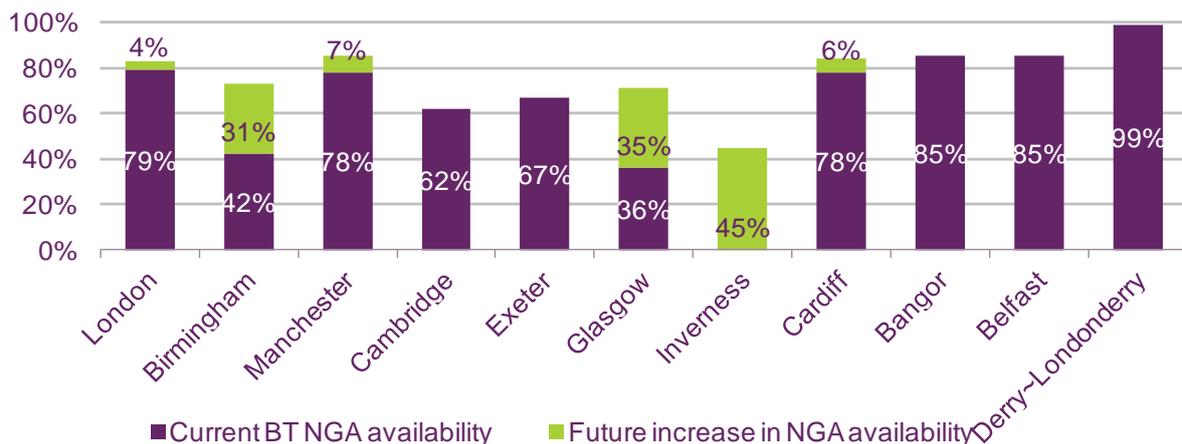


Source: Analysys Mason, Ofcom Infrastructure Report 2012

In general, next-generation access (NGA) services from BT are more widely available than from Virgin Media

In general, the availability of NGA services across the 11 cities is greater for services supplied by BT than services supplied by Virgin Media. However, in many cases the availability for each service contains areas where the networks do not overlap, resulting in higher overall availability than each individual network supplies. For example, in Cardiff BT has current availability estimated at 78% while Virgin Media has current availability estimated at 68%. The combined current NGA service availability for Cardiff is 92%.²⁰

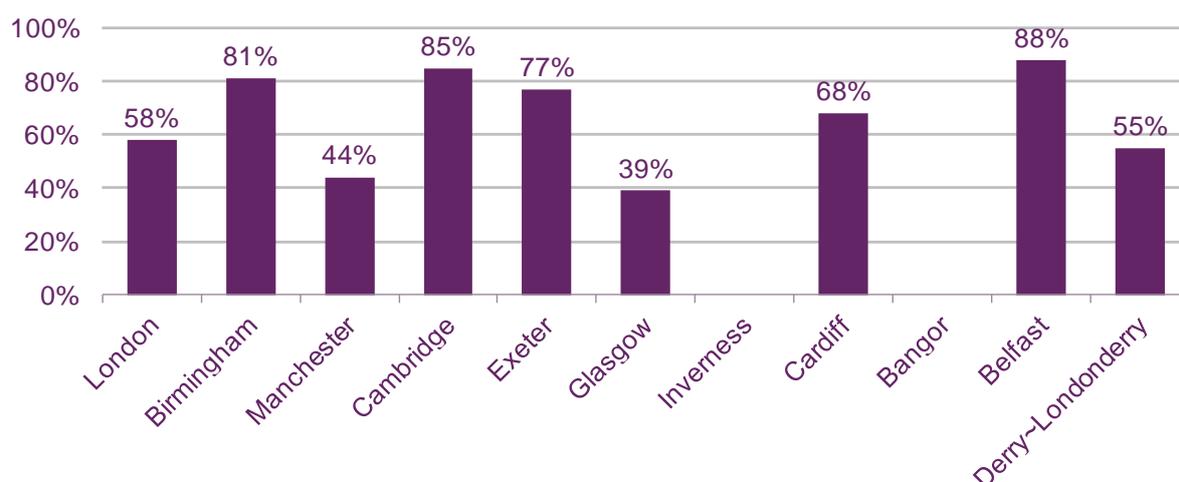
Figure 1.80 Estimated current and future availability of BT NGA broadband infrastructure for eleven cities



Sources: Source: Analysys Mason, BT

²⁰ The data for both the BT and Virgin Media analysis contains a number of assumptions and approximations and therefore may differ from other reported figures. The methodology for both sets of results is fully explained in the Analysys Mason report.

Figure 1.81 Availability of Virgin Media cable infrastructure for 11 cities



Source: Analysys Mason, Virgin Media

FTTC roll-out is lagging behind in Birmingham and Glasgow

The BT fibre network comprises fibre-to-the-cabinet (FTTC) and fibre-to-the-home (FTTH) infrastructure. Figure 1.82 shows the FTTC status of each city's exchanges, according to BT's current roll-out plans. 'In-plan' is used to describe exchanges that BT has indicated will be upgraded in the future.

Birmingham and Glasgow, which are large cities with high population densities, have relatively low availability compared to other cities. This may be because BT's plans for roll-out have been affected by local market conditions. For example, there has been relatively low take-up of first-generation broadband services, which might be attributed to factors such as social deprivation²¹, local authority planning and highway issues, or there may be an increased risk attached to the existing and future level of competition. Although Glasgow's local authority was unsuccessful in its 'super-connected city' bid for BDUK²² funding, it is now believed to be investigating the possibility of deploying its own initiatives, such as broadband demand stimulation projects.

²¹ This is suggested by a visual comparison of (a) the location of exchanges serving postcodes for which there are currently no plans for a next-generation upgrade, and (b) areas within the cities that form part of the 20% most deprived areas nationally.

²² Broadband Delivery United Kingdom

Figure 1.82 Upgraded and in-plan exchanges as a percentage of the total exchanges serving the city area

City	Number of exchanges	Already upgraded exchanges	% of total number of exchanges	Other in-plan exchanges	% of total number of exchanges
London	209	176	84.3%	10	9.5%
Birmingham	41	16	39%	14	34.1%
Manchester	24	21	87.5%	3	12.5%
Cambridge	7	2	29%	0	0%
Exeter	5	1	20%	0	0%
Glasgow	33	10	30.3%	12	36.3%
Inverness	3	0	0%	1	33%
Cardiff	14	10	71.4%	4	28.6%
Bangor	1	1	100%	0	0%
Belfast	15	15	100%	0	0%
Derry~Londonderry	10	10	100%	0	0%

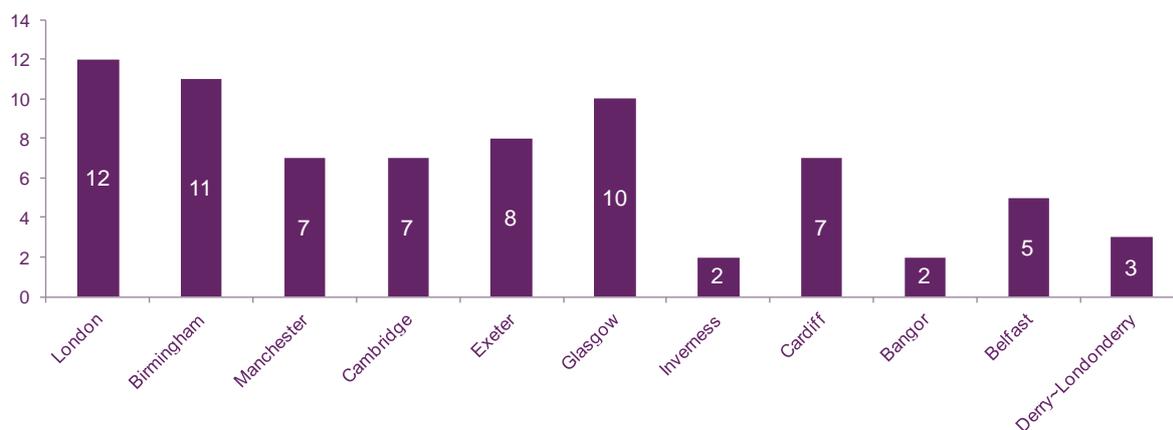
Source: Analysys Mason 2013

There are at least three alternative fibre network operators with a point of presence in all cities

In addition to the two main operators which own fibre network infrastructure (BT and Virgin Media), a number of alternative operators also have their own fibre network infrastructure, or at least a point of presence i.e. an interconnection with another communications provider, in each city. Alternative operators tend to focus on providing services to larger business customers.

The number varies significantly from city to city, with the numbers (as expected) broadly correlating with the population of each city.

Figure 1.83 Number of alternative operators to BT and Virgin Media identified as having a point of presence



Source: Analysys Mason 2013

The availability of WiFi hotspots varies considerably across cities, and is often greater in smaller cities

Bangor and Inverness are particularly well served in terms of hotspots per head, despite having a smaller number in absolute terms. This may be because small cities have a more easily discerned and identified centre, whereas sprawling cities may have multiple centres, or a greater ratio of population to central hubs. The large value for Bangor may also be due to its large student population. An exception is the smaller city of Derry-Londonderry, which has a much lower hotspot density.

Although Figure 1.84 only shows hotspots provided by The Cloud and BT, it should be noted that there are several projects under way to increase WiFi availability in certain cities. Local authorities are increasingly engaging in wireless ‘concession’ schemes to upgrade the passive infrastructure to encourage private operators to invest in wireless infrastructure across their city. This is evidenced by the inclusion of such schemes in the Super-Connected Cities Projects, which are funded by the Urban Broadband Fund.²³

Derry City Council plans to fund the installation of a public WiFi network in the city, which will supplement the relatively low provision of hotspots provided commercially.

Figure 1.84 Hotspots per 10,000 city residents (hotspots provided by The Cloud and BT)

City	City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
London	3220	4.1	6.2	-33%
Birmingham	350	3.4	6.2	-45%
Manchester	278	5.6	6.2	-10%
Cambridge	84	6.7	6.2	+8%
Exeter	64	5.4	6.2	-13%
Glasgow	350	6	6.2	-3%
Inverness	30	8.1	6.2	+31%
Cardiff	240	7.1	6.2	+14%
Bangor	21	14.1	6.2	+129%
Belfast	150	5.7	6.2	-8%
Derry-Londonderry	20	1.8	6.2	-70%

Source: Analysys Mason 2013

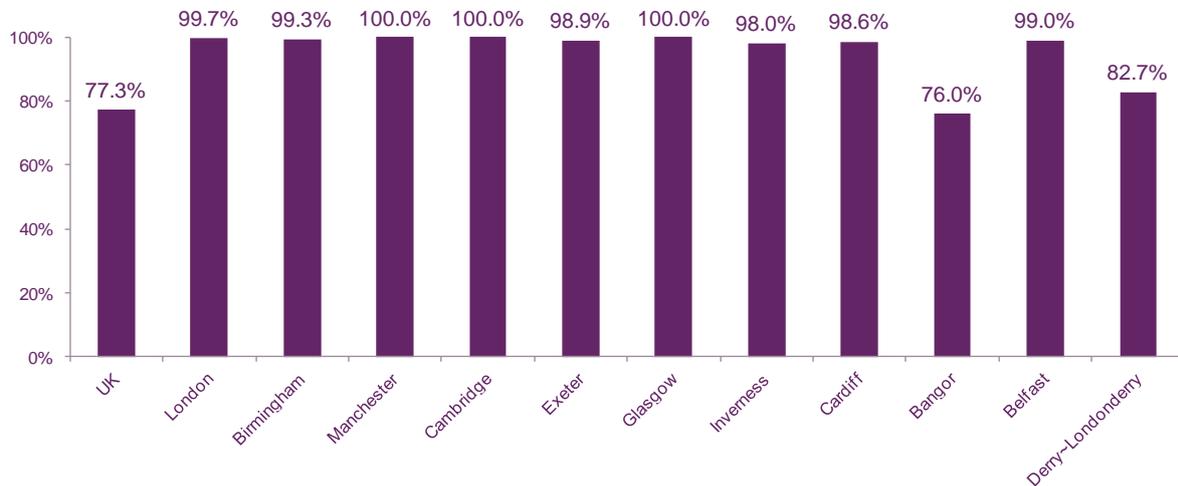
All cities have good 3G mobile coverage, and most are covered by all four operators

In all cities except Derry-Londonderry and Bangor, all four competing 3G mobile networks provide coverage to the vast majority of premises. This compares favourably to the UK as a whole where, on average, 77.3% of premises are covered by all four operators. Only one city, Derry-Londonderry, has premises which are not covered by any mobile operators, although this affects only 2% of premises.

²³ Seven out of the eleven cities have been awarded funding from the Urban Broadband Fund, namely: London, Birmingham, Manchester, Cambridge, Cardiff, Belfast and Derry-Londonderry.

At the time of writing, 4G coverage is widespread in six of the cities assessed: London, Birmingham, Manchester, Glasgow, Cardiff and Belfast, and in the vast majority of cases, coverage is provided by the operator EE, which has been able to use an existing spectrum licence. The exception is London, where 4G coverage is also provided by the operator UK Broadband, but only in selected locations.²⁴

Figure 1.85 3G mobile coverage from four operators (% of premises), by city



Source: Analysys Mason 2013

There is no significant difference in standard broadband speeds between the cities assessed

Figure 1.86 compares, for all cities, the average maximum modem sync speed²⁵ for basic broadband, and also superfast broadband (SFBB) lines, although these results are presented for illustrative purposes only, as they are based on a dataset in which all superfast broadband line speeds have been set at 40Mbit/s.

The speed results are sensitive to the percentage of FTTC lines in each city. BT has plans to upgrade exchanges in some cities, and there are also several public projects under way to increase the number of premises that have access to NGA. It is therefore expected that in future all cities will have a fairly similar, good quality of service in terms of the average maximum modem speed of all broadband lines.

²⁴ Source: Analysys Mason

²⁵ For broadband delivered over telephone lines using the family of digital subscriber line (DSL) technologies, the modem sync speed is the downstream data rate at which the ISP's equipment in the local exchange or cabinet sends data to the customer's broadband modem.

Figure 1.86 Illustrative results as at June 2012, showing average modem sync speed for basic broadband and SFBB lines, with SFBB all set at 40Mbit/s

City	Excluding SFBB lines (City average = 14.1 Mbit/s)		Including SFBB lines (City average = 29.9 Mbit/s; UK average 12.7 Mbit/s)	
	Average maximum speed (Mbit/s)	% difference	Average maximum speed (Mbit/s)	% difference to city average
London	15.7	+12%	33.1	+11%
Birmingham	14.9	+6%	34.4	+15%
Manchester	13.8	-2%	30.8	+3%
Cambridge	14.4	+2%	36.2	+21%
Exeter	13.4	-5%	32.9	+10%
Glasgow	14.2	+1%	27.3	-9%
Inverness	12.2	-13%	12.2	-59%
Cardiff	12.3	-13%	34.4	+15%
Bangor	15.9	+13%	15.9	-47%
Belfast	16.1	+14%	37.2	+24%
Derry-Londonderry	11.9	-15%	35	+17%

Source: Analysys Mason, Ofcom Infrastructure Report 2012

Models of intervention

All of the cities assessed have a digital infrastructure strategy (or similar) and/or a digitally focused organisation or delivery programme. Different operational models and partnership arrangements exist for managing and delivering digital objectives. Cities' objectives also differed, with varying emphases on demand-side stimulation initiatives and projects to address social and digital inclusion, and different supply-side approaches to increase the availability of the communications infrastructure.

In some cases the city objectives are part of larger regional initiatives, which is particularly important for cities such as Bangor and Inverness, which do not have a local 'city' authority to represent them. Most of the other cities in the study are unitary authorities except for Cambridge and Exeter City Councils, which are within two-tier regimes; notably, both councils are working in partnership with their local county council. Overall, the governance of a city was not identified as having an impact on the availability of communications infrastructure and services.

Well-designed public-sector intervention has had a marked effect on NGA broadband availability, as demonstrated by the 99% availability in Derry-Londonderry; other factors such as local social, economic and political influences, harnessed through local initiatives, can also have an impact on availability of communications infrastructure and services. But public-sector intervention has proved more challenging in Birmingham, where BT and Virgin Media have lodged legal challenges to the city's Super-Connected Cities Programme, which had been designed to bring ultrafast broadband to the city. The key public-sector

interventions in each city are explored in more detail in the full Analysys Mason report, which can be found on Ofcom’s website²⁶.

1.8.5 Analysis of telecommunications take-up in UK cities

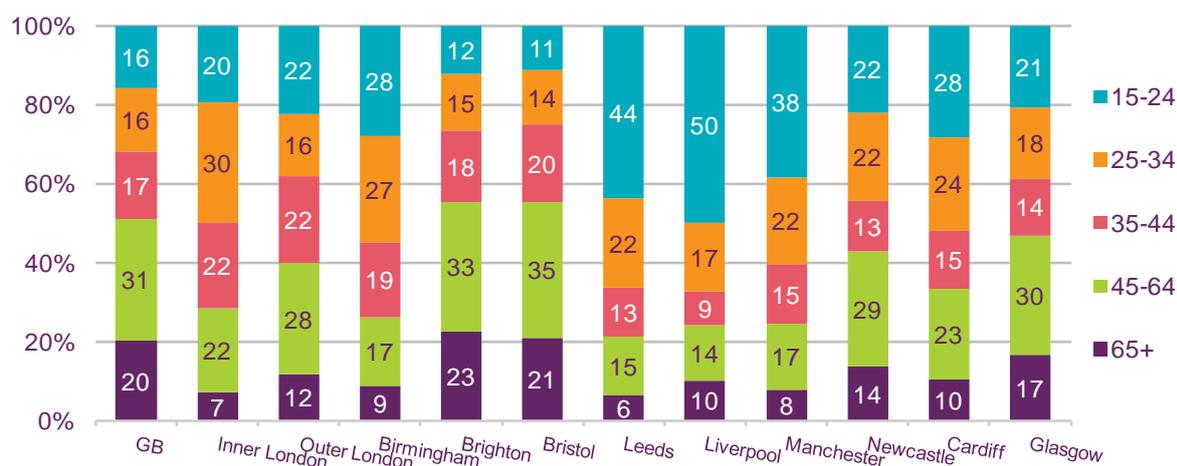
The following analysis uses data from the BPS to assess the extent of telecommunications take-up in UK cities. The cities compared in this section differ slightly from those compared in the previous section.

City demographics

The large cities of the UK vary widely in their population profile. Some, such as Cardiff, are university cities with a relatively young population. Others, such as Glasgow, are post-industrial with a relatively older and lower socio-economic population. Research has shown that age and socio-economic classification are important drivers for take-up and use of communications, so differences between cities are to be expected²⁷.

Manchester, Cardiff, and Birmingham have a youthful profile compared to Great Britain as a whole and to the other cities in the analysis. As a general rule, with the exception of Brighton and Bristol, a lower percentage of people over 65 live in the cities.

Figure 1.87 City profiles, by age



Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149, Cardiff 460, Glasgow 1398)

Q. How old are you?

Two of the cities reported on, Birmingham and Glasgow, have high levels of deprivation, with over a third of inhabitants being in socio-economic group DE. This contrasts with Cardiff and Manchester, where over two-thirds of inhabitants are in socio-economic group ABC1.

²⁶ <http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr13/cities-report.pdf>

²⁷ It is worth noting that the BPS was not designed to be representative of cities but rather to be representative of Great Britain as a whole and government office region within that. Therefore, the city profile may not be accurately represented by the sample, but as the true city profile is unknown, the data cannot be adjusted.

Figure 1.88 City profiles, by socio-economic group



Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149, Cardiff 460, Glasgow 1398)

Q. Derived from questions about employment and job title.

In Cardiff, Leeds, Liverpool, and Manchester, there is lower use of landline telephones

Across Great Britain, 62% of consumers use their landline for both voice and internet services. Within many of the cities, there are fewer people who use their landline for voice services. Within the cities with high student populations (Cardiff, Leeds, Liverpool, and Manchester), between 38% and 75% of the sample in each city respectively have discarded the landline telephone and use their landline only for home internet.

Glasgow has an unusual communications profile. Significantly higher percentages of inhabitants have either only a mobile phone (19%) or only a landline telephone (10%). A further 15% have a fixed telephone and mobile but no internet. Glasgow also has a significantly lower number of people living in a household with fixed internet access.

Figure 1.89 Access to landline, by city



Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149, Cardiff 460, Glasgow 1398)

Q. Is there a landline telephone in your household? How do you access the internet?

Glasgow and Birmingham have below average internet take-up

Glasgow has a significantly lower percentage of individuals accessing the internet (57%), by any means, than all other cities and Great Britain as a whole. People in Birmingham also have significantly lower internet access than the other cities (76% compared to the Great Britain average of 83%), which may be a reflection of its socio-economic profile.

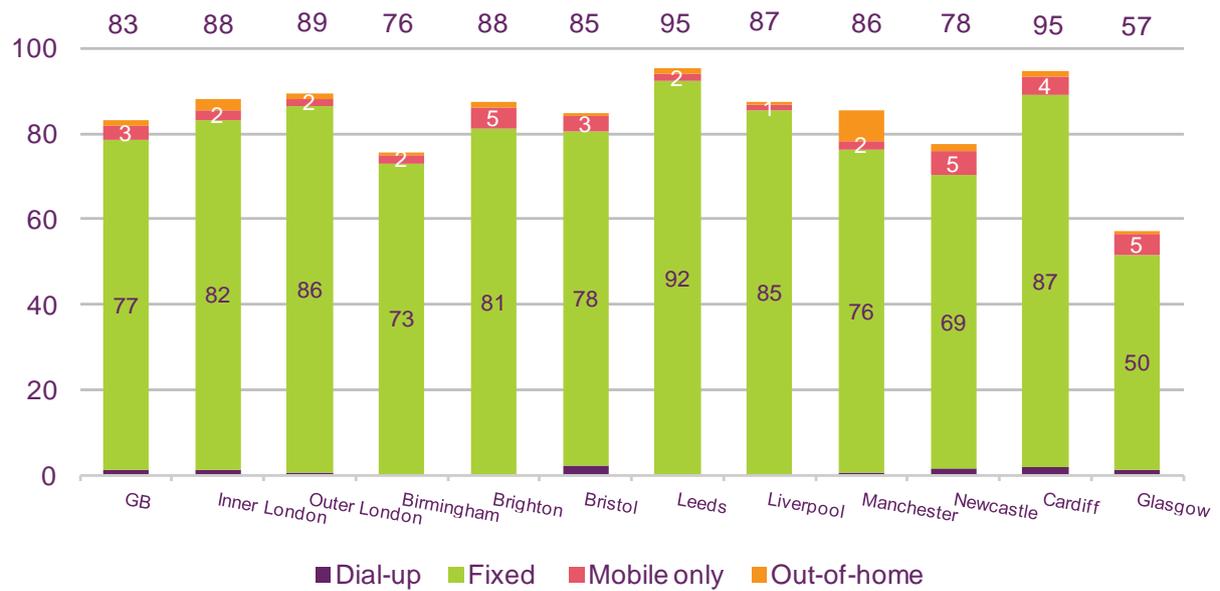
A study undertaken by the Carnegie Trust²⁸ in 2012 suggests that attitudinal rather than demographic differences may partly explain the lower take-up of broadband in Glasgow. The Trust's research identified two distinct groups among those without internet at home – 'rejecters' and 'potential users'. 'Potential users' (57% of the population without online access) are interested in going online at some future date while 'rejecters' (43%) have no such interest. A further discussion of the barriers to internet take-up among these groups is available in the *Communications Market Scotland* report²⁹.

In the light of this, although the local authority in Glasgow was unsuccessful in its 'super-connected city' bid for BDUK funding, it is now believed to be investigating the possibility of deploying its own initiatives, such as broadband demand stimulation projects.

²⁸ The Carnegie Trust commissioned Ipsos MORI to undertake 200 in-depth interviews – 136 with those who had never used the internet, ten with those who had used the internet but no longer did so, 20 who accessed the internet outside the home and 34 who had mobile or home internet.

²⁹ www.ofcom.org.uk/cmtr

Figure 1.90 Access to the internet, by method, by city



Source: British Population Survey

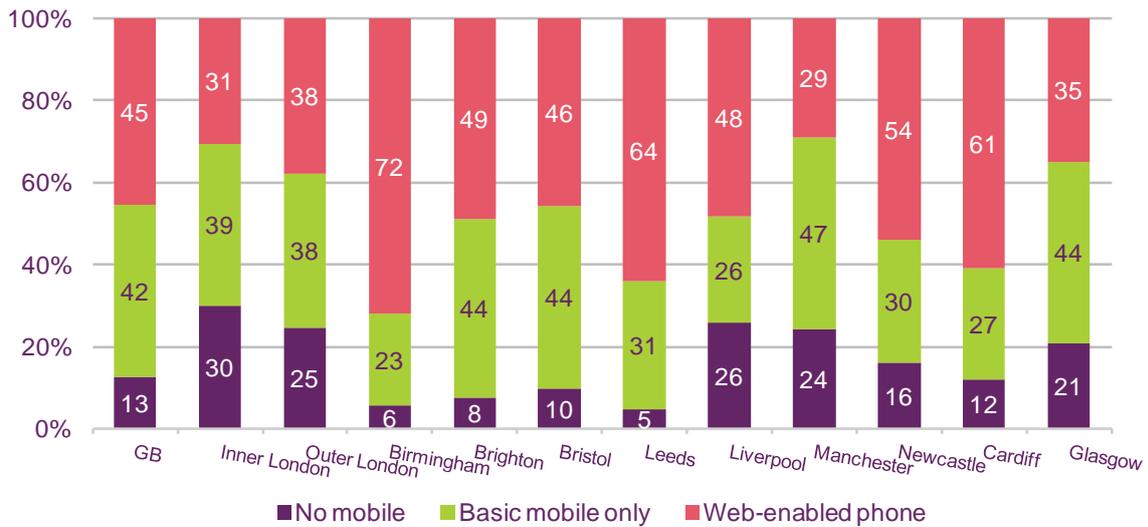
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149, Cardiff 460, Glasgow 1398)

Q. How do you access the internet? Is your access to the internet at home provided by...?

Over a quarter of Londoners do not have a mobile phone

Compared to Great Britain as a whole, there are high percentages of people in some cities, such as Inner London, Liverpool and Manchester, who do not have a mobile phone. Access to a web-enabled mobile is highest in Birmingham and Leeds, with 72% and 64% take-up respectively. A significantly lower percentage of people in Glasgow and Manchester use a web-enabled mobile than in the rest of Great Britain.

Figure 1.91 Access to mobile devices, by city



Source: British Population Survey

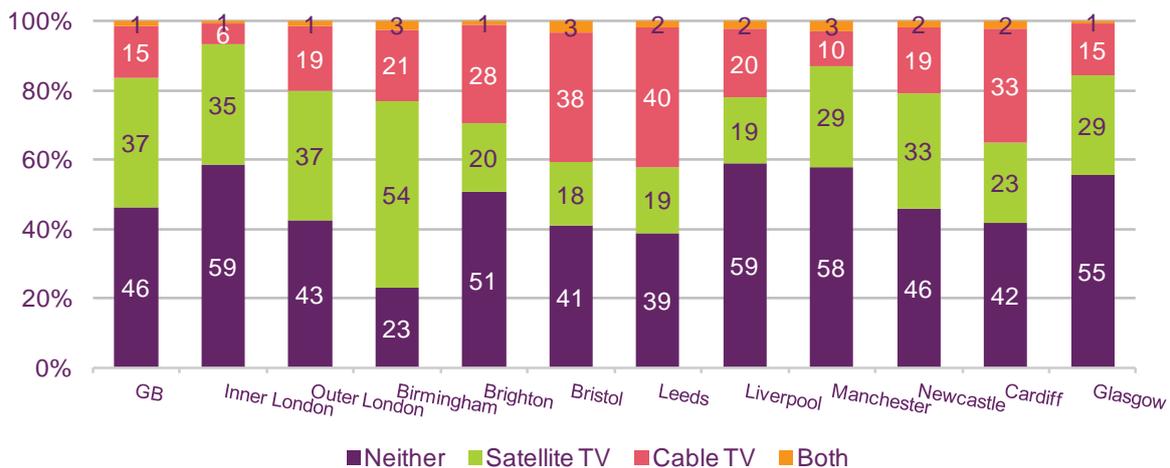
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Kingston 496, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. Is there a mobile telephone in your household? Is there a web-enabled telephone in your household?

Access to satellite TV significantly higher in Birmingham than rest of Great Britain

As cable roll-out is mainly focused in urban areas, it is not surprising to see that access to cable TV is higher in many cities than across Great Britain as a whole. Cardiff, in particular, shows high take-up of cable TV. Birmingham has significantly high levels of satellite TV take-up, which may result from the large ethnic population accessing foreign-language channels. Access to DTT-only services is highest in Inner London, Manchester and Glasgow.

Figure 1.92 TV platform, by city



Source: British Population Survey

Base: All adults 15+ (April 2012 to March 2013; GB 79406, Inner London 3858, Outer London 6043, Birmingham 2577, Brighton 1090, Bristol 560, Cardiff 460, Glasgow 1398, Kingston 496, Leeds 1412, Liverpool 745, Manchester 2156, and Newcastle 1149)

Q. Does your household have satellite /cable TV?

1.9 News consumption in the UK

1.9.1 News consumption in the UK

Introduction

In this section we examine patterns of news consumption in the UK among different groups of the population, analysing by age, gender and socio-economic group. As well as looking at general news, we provide an overview of local news media, to see which types of local media people are using, how important they find these sources and how satisfied they are with them.

We use a variety of sources of information to answer these questions, including:

- a news survey commissioned by Ofcom from Kantar Media, comprising an omnibus survey of 2862 people across the UK, including boosts of 350 in each devolved nation;
- a survey of local news commissioned by Ofcom from Ipsos Mori, comprising an omnibus survey of 2016 people across the UK;
- industry metrics from comScore, BARB and NRS; and
- an online survey conducted by YouGov for the Reuters Institute Digital News Report 2013, comprising 2078 online users of news.

1.9.2 Key findings

- **TV remains the most important and frequently-used mode of news consumption, and one in five people say their only source of news is television.** Nearly eight in ten (78%) UK adults say they use the television to access news. Newspapers are used by four in ten; radio by just over one-third (35%); and the internet, either on a computer or mobile, by just under one-third (32%). Overall, 90% of UK adults say they follow news.
- **Across all platforms, BBC One is the most-used news source.** After the BBC, Facebook and Google are the most-used online news sources. The majority of daily newspaper and radio news users use only one source for news on these platforms.
- **Reading news articles online is the most popular method of online news consumption, but social networking and search are popular for a significant minority.** The majority of those who use the internet for news say they read news stories online (54%), but just over a quarter say they read news-related comments on blogs or social networks, and one in five say they watch audio-visual content online.
- **There are considerable differences in behaviour by age group,** with online activities and newer forms of news access being carried out particularly by younger age-groups. There are also differences by socio-economic grade, which is an important reminder of the variation in consumption of news across different parts of society.
- **TV channels are seen as the most important news source, but one in seven people nominate a website or app as their most important news source.** When asked about the reliability, trustworthiness, accuracy and range of the different news

sources they used, most TV news viewers rate their sources highly. Ratings are more varied for newspaper readers, and broadsheet readers rate newspapers particularly highly as being trustworthy. Online users rate websites in more differentiated ways than other platforms. Twitter is rated most highly by its users for offering a range of opinions.

- **TV channels are the most popular source of local news, although one in three respondents say they browse online for local news and information.** One in six (17%) regular news users say online is their most important local source, and similar numbers nominate any newspapers (16%) and any radio (14%).

1.9.3 Cross-platform comparisons

TV remains the most popular way people access news

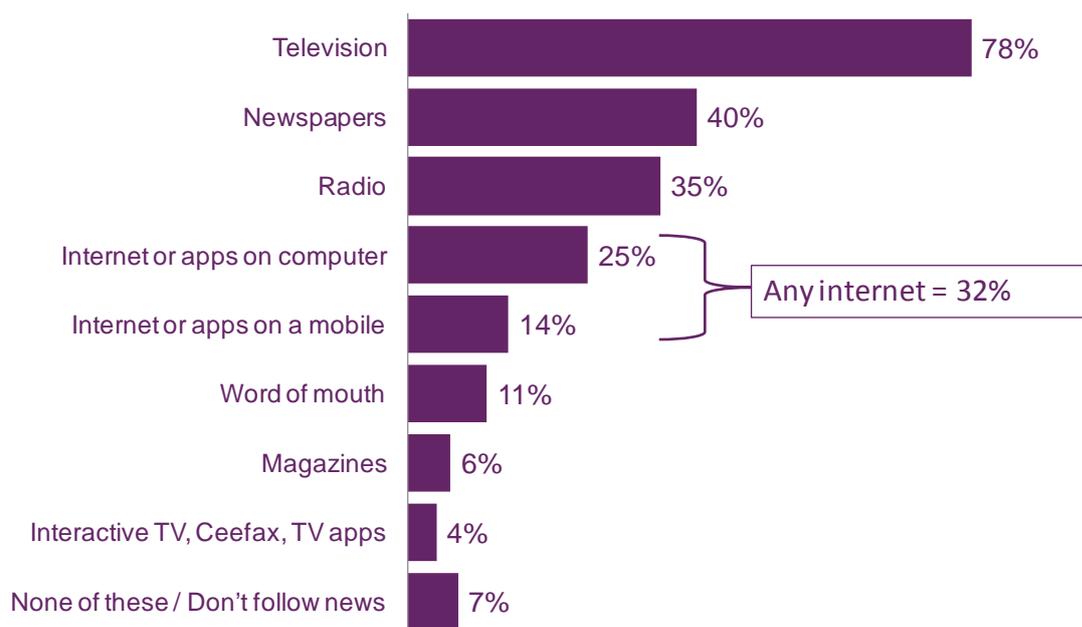
Overall, 90% of UK adults say they follow news. Nearly eight in ten (78%) UK adults say they use the television to access news 'nowadays', as shown in Figure 1.93. Print newspapers are used by four in ten; radio by just over a third (35%); and the internet, either on a computer or mobile, also by just under a third (32%)³⁰.

There are significant differences in patterns of consumption by demographic group. People in the ABC1 socio-economic group are twice as likely as those in the C2DE socio-economic group to use the internet for news (44% vs. 21%). Those aged under 45 are more likely than those aged over 45 to use the internet for news: for example, 45% of those aged 25-34 say they do this, compared to 32% of 45-54s.

Younger people are far more likely than older people to use their mobile phone for accessing news, with 26% of 16-24s saying they do this, compared to 19% of 35-44s and 11% of 45-54s. But younger people are less likely than older people to use other platforms. For example, 58% of 16-24s say they use TV to access news, compared to 73% of 25-34s and 82% of 45-54s. And around one third of 16-44s say they use newspapers for news, compared to 45% of 55-64s.

³⁰ Data for news consumption on platforms cannot be compared with that collected from the similar ad-hoc study on news from 2012, available at <http://stakeholders.ofcom.org.uk/binaries/consultations/measuring-plurality/statement/Annex5.pdf>. This 2012 study had asked prior questions on topics considered to be news, topics of interest, and topics considered important for society to know about; hence respondents were primed into thinking about a wider range of topics within the definition of news e.g. sport, celebrity gossip, etc. For the 2013 survey they were asked *straight away* about the platforms they used for news, so the 2013 figures are lower in all cases than in the 2012 study.

Figure 1.93 Platforms used for news 'nowadays'



Source: Ofcom news omnibus 2013, all adults 16+, n=2862
Q3a) Which of the following do you use for news nowadays?

One in five people say they rely solely on their TV for news

Around one in twenty (6%) of the UK population use all four main platforms for news – i.e. TV, newspapers, radio and the internet. This varies considerably by socio-economic group, rising to 11% of ABs compared to 2% of those in DE households.

At the opposite end of the behavioural spectrum, around one in five (22%) use only television for news, with DEs being three times as likely as ABs (30% vs. 10%) to do this. People aged 16-24 are less likely (16%) than over-55s (26%) to use only TV for news.

One in twenty (5%) say they only use the internet for news; while 10% of 16-34s say this, only 1% of those aged 55+ do so.

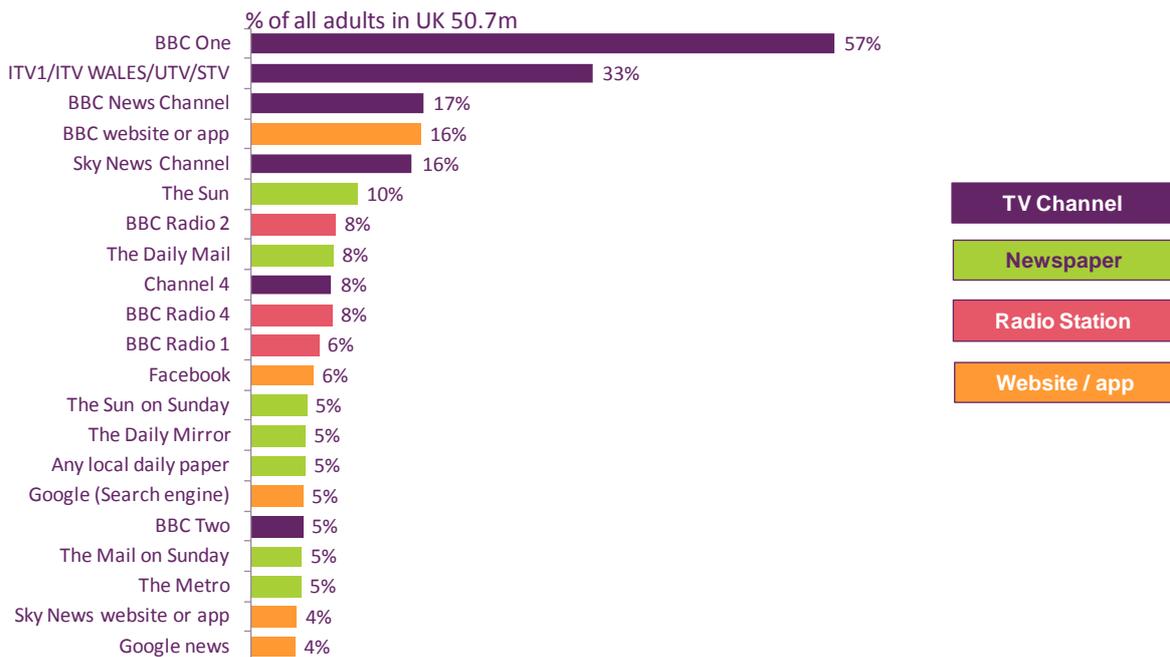
Three per cent of people say they only use newspapers for news, and 2% say they only use the radio.

Among news services across all platforms, BBC One is the most popular news source

Looking at the specific news sources that people say they use, across the different platforms, Figure 1.94 shows that BBC One has the highest reach, with 57% of people saying they use it for news, followed by ITV1, with one third saying they use it. The Sun (10%) and the Daily Mail (8%) are relatively popular as newspaper news sources, and Radios 2 and 4 as radio sources (8% respectively); that said, half the sources in the first ten are TV channels.

The most popular websites used for news are the BBC (16%), Facebook (6%), the Google search engine (5%) and the Sky News website (4%) (please see Section 1.9.7 for discussion of online news habits and sources).

Figure 1.94 Top 20 news sources – reach among all adults



Source: Ofcom news omnibus 2013, all adults 16+, n=2862
 Q5a-f) Thinking specifically about <Source> which of the following do you use for news nowadays?

A majority of daily newspaper and radio news users rely on just one source

People use an average of 3.9 individual news sources across TV, radio, press and online. By platform, people use an average of 1.9 sources onTV, 2.1 in newspapers, 1.4 for radio and 1.9 for the internet.

Among those that use just one source for news, we find that nearly two-thirds of radio news listeners (64%) and daily newspaper news readers (63%) use just one source. The figures are less pronounced for online news users, where nearly half (45%) use only one source; the comparable figure for TV viewers is 43%.

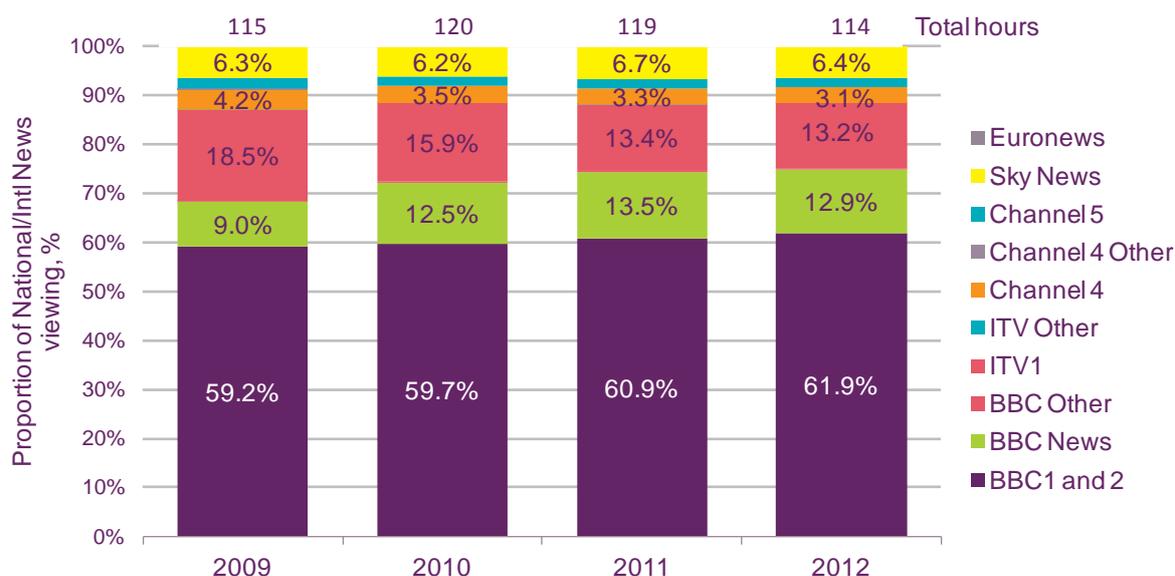
C2DEs are more likely than ABC1s to use only one source (68% vs. 61%). For newspapers, 16-24s are less likely to use only one source (57% vs 72% for those aged 55+). And while there are few demographic differences for the internet, there are some for TV, with people from the AB socio-economic group being less likely to only use one source (37%), compared to 46% of TV news viewers in DE households.

1.9.4 Television

TV viewers watched 114 hours of news in 2012, slightly less than in 2011

Figure 1.95 shows that the overall amount of news consumption on television has been relatively stable over recent years, although it can vary according to the news events of a given year. However, there have been some changes in the proportion of viewing to different sources on the TV platform, with a reduction in viewing to ITV over the period, as well as to Channel 4, and a corresponding rise in viewing to BBC News.

Figure 1.95 Share of viewing of national and international news, all adults



Source: BARB, national/international news genre, 4+ regions.

Note: S4C excluded from this analysis. Shares are based on national/international news viewing to the listed channels only.

Note: BBC One and Two, ITV1, Channel 4 and Channel 5 include HD variants and +1 channels where applicable. BBC Other, ITV Other and Channel 4 Other includes portfolio channels

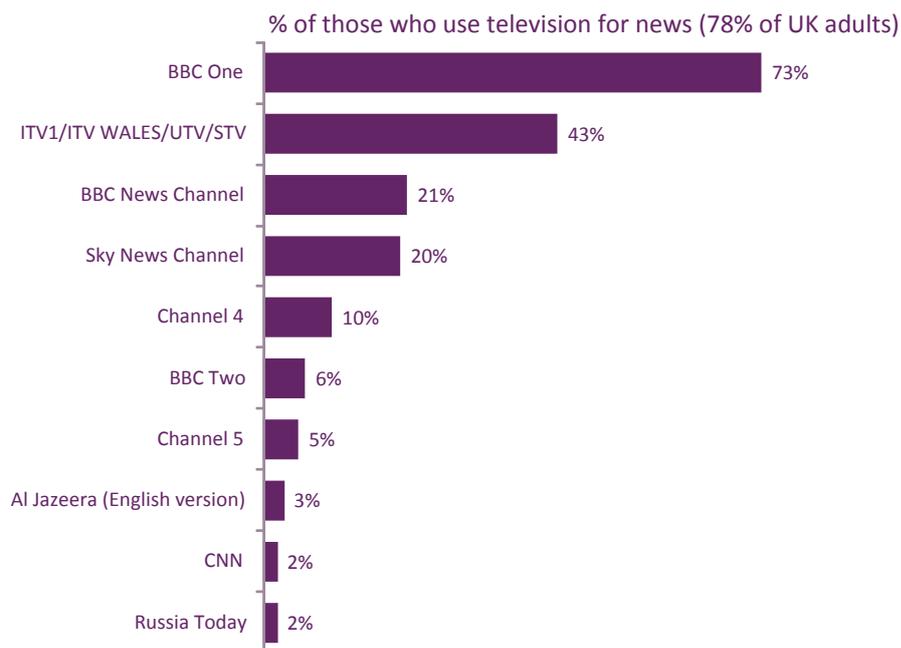
Note: 2009 data based on Network Plus, 2010-2012 data based on nNetwork.

Self-reported use of TV news suggests that around one in five news viewers watch the BBC news channel and Sky News

In terms of which news sources are used 'nowadays' by TV viewers, Figure 1.96 shows that according to our survey respondents³¹, BBC One is most used, followed by ITV. The BBC News channel and the Sky News channel are watched by around one in five TV news viewers. Channel 4 is mentioned by one in ten, and Al Jazeera by 3%.

³¹ We report on self-reported news consumption here, rather than BARB viewing figures, in order to be consistent across the different platforms.

Figure 1.96 TV channels used for news ‘nowadays’



Source: Ofcom news omnibus 2013

Q5a) Thinking specifically about television, which of the following do you use for news nowadays

Base: All who use TV for news (2290)

Note: only sources with an incidence of 2% or more are shown

1.9.5 Radio

There is little overlap between listeners to BBC and commercial radio news

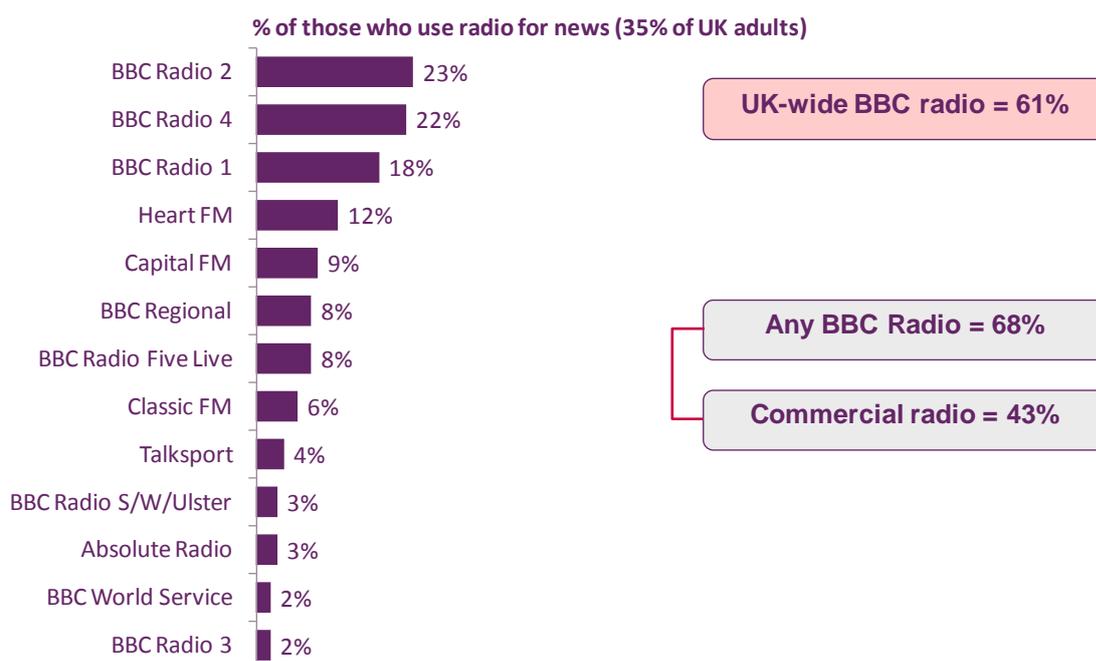
Figure 1.97 shows that the BBC’s radio stations are used most frequently for news, with Heart, Capital and Classic FM being the three most-cited commercial radio stations for news.

At an aggregate level, the BBC’s radio stations are listened to for news by nearly seven in ten radio news listeners (68%); the comparable figure for commercial radio news is 43%.

There is little overlap between the two – 58% of radio news listeners listen only to the BBC news, 28% listen only to commercial radio news, and 15% listen to both forms of news.

There are a range of differences by demographic group. Women are more likely than men to say they listen to news on commercial radio (48% vs. 38%), and men are more likely to say they listen to news on BBC stations (66% vs. 55%). While there is no difference between those aged 16-24 and 55+ in terms of listening to BBC stations, 16-24s are more likely than over 55s to listen to commercial stations – 50% vs. 30%. People from ABC1 households are more likely than those from C2DE households to use the BBC (66% vs. 54%).

Figure 1.97 Radio stations used for news



Source: Ofcom news omnibus 2013

Q5a) Thinking specifically about radio stations, which of the following do you use for news nowadays?

Base: All who use radio for news (1000)

Note: only sources with an incidence of 2% or more are shown

Note: 'UK-wide BBC radio' includes Radio 1, Radio 2, Radio 3, Radio 4, Radio Five Live, World Service (61%). 'Any BBC' includes all these plus BBC local radio

1.9.6 Newspapers

One in four newspaper readers read broadsheet titles and mid-market titles

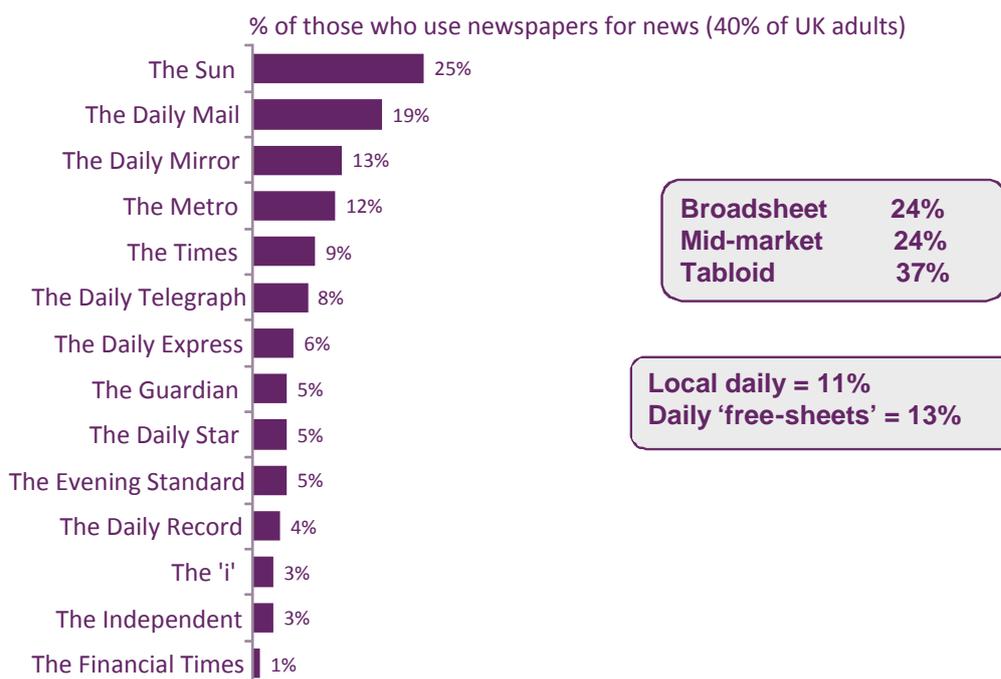
As stated previously, four in ten people say they use print newspapers for news. Of those who read daily newspapers, nearly-two thirds (63%) use just one source.

We asked daily readers to say which newspapers they read in print, and one in four cited a broadsheet newspaper (24%), and the same proportion nominated a mid-market title (24%). Over one third (37%) read a tabloid newspaper, 13% a freesheet, and 11% a local daily.

Figure 1.98 shows the main daily newspapers that people use 'nowadays', with The Sun being nominated by one quarter (25%) of all newspaper readers, and the Daily Mail by one in five (19%).

By age and socio-economic group among newspaper users, tabloid newspapers are more likely to be read by 16-24s (52%) than by those aged 55+ (31%), and by those in C2DE socio-economic groups (50%) rather than those from ABC1 households (23%). Older people are more likely to read mid-market newspapers (32% aged 55+ vs. 16% aged 16-24), although there are few age differences for the broadsheet titles. In terms of daily freesheets, however, there is a strong skew between those aged 16-24 and those aged 55+, with 25% of 16-24s reading daily freesheets compared to 4% of those aged 55+. This is very likely to be an outcome of how these papers are usually read while commuting to jobs or college.

Figure 1.98 Daily newspapers used for news ‘nowadays’



Source: Ofcom news omnibus 2013

Q5b) Thinking specifically about daily newspapers, which of the following do you use for news nowadays?

Base: All who use newspapers for news (1252)

Note: 'Any local daily' includes any local newspaper; 'daily freesheet' includes Metro, Evening Standard and City AM

The Daily Mail and The Guardian see the largest increase in readers through their online presence

Figure 1.99 shows the unique reach of daily newspapers across print and online. This shows data from the National Readership Survey (NRS) combined with data from the online measurement currency comScore to show online-only readership, print-only readership, and a combination of the two.

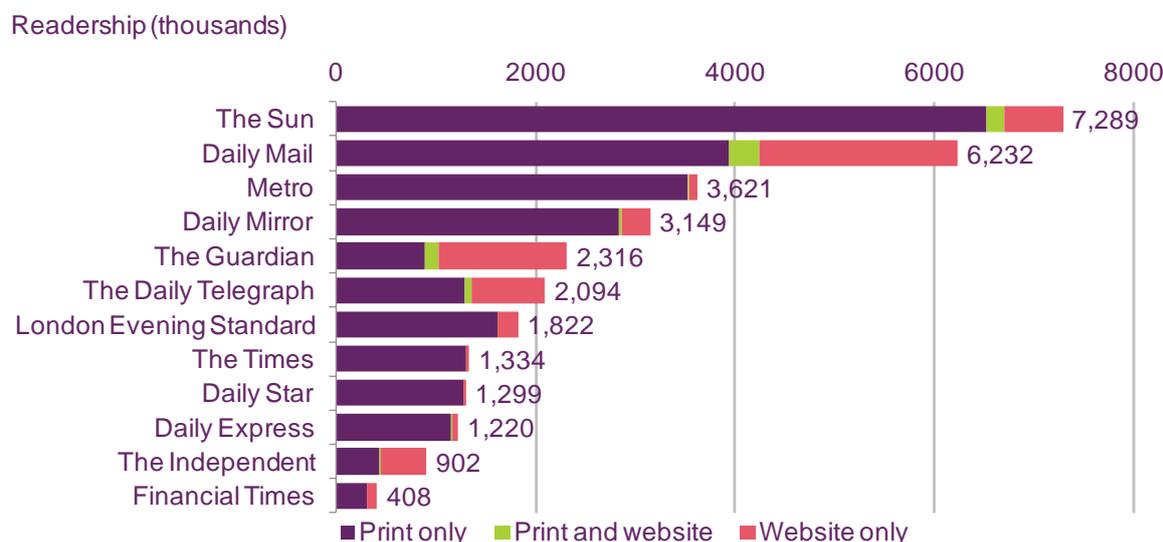
The Sun is the daily newspaper with the highest number of readers per issue. For the year to March 2013, the average issue readership³² of The Sun was 6.7 million. The next most widely-read newspaper was the Daily Mail, with an average of 4.2 million readers for each issue.

The Guardian and The Daily Mail see the largest increase in readership when the additional online readers are taken into account, with readership of The Guardian more than doubling from 1 million to 2.3 million. Of these, 1.3 million readers are online only. The Daily Mail also has a large increase in readership, from 4.2 million to 6.2 million, but The Sun is still the most-read title.

³² Average issue readership is the reach metric used by the National Readership Survey and refers to the number of readers who have read a title within its given publication period. For daily newspapers, the publication period is one day; for Sunday titles, the publication period is one week.

Typically, the broadsheets see a larger increase from online in comparison to the tabloid newspapers. The exception to this is The Times, which has a far lower online reach than other titles, probably due to its paywall strategy.

Figure 1.99 Combined print and online readership of daily newspapers



Source: Ofcom analysis of NRS/comScore PADD, March 2013. NRS average issue readership April 2012 – March 2013 fused with comScore March 2013

1.9.7 Online

After the BBC, Facebook and Google are the most popular online news sources

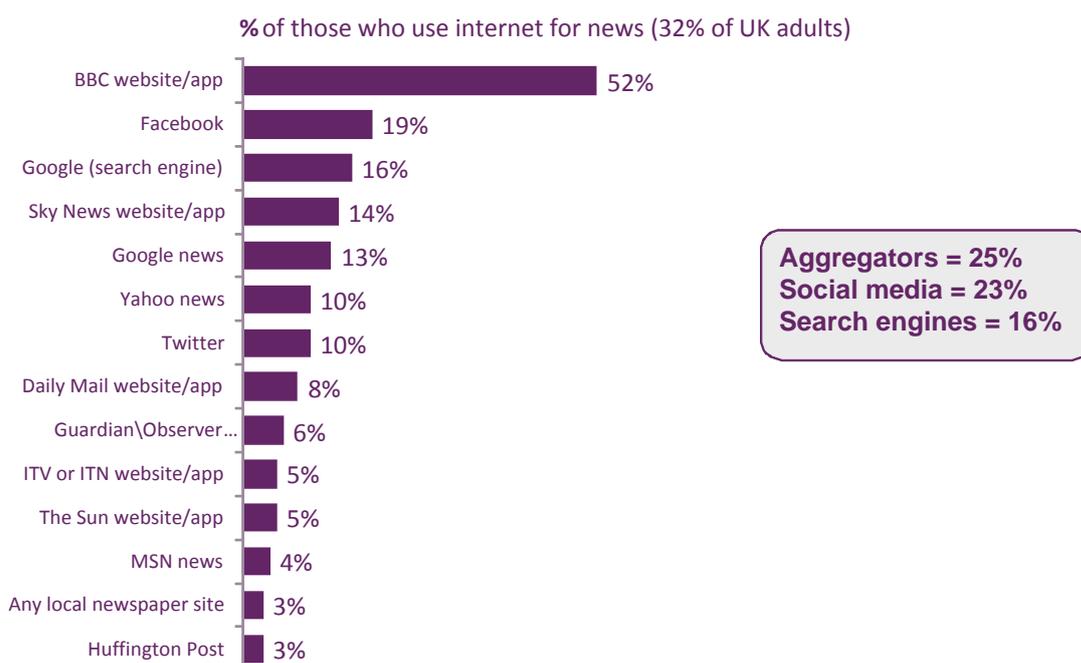
Of those that use the internet for news, just over half say they use the BBC (52%), as Figure 1.100 illustrates.

One in five (19%) say they use Facebook for news, and 16% use the Google search engine. Overall, one quarter (25%) say they use aggregators such as Google News or Yahoo News, and 23% social media such as Facebook or Twitter.

Use of these types of site varies by age group, with Facebook being used for news by 29% of online news users aged 16-24, but by only 5% of those aged 55+. Similarly, Twitter is used by 16% of 16-24s compared to 3% of those aged 55+. At the aggregate level, social networking is more likely to be used by women (27%) than men (19%) for news, but across aggregators and search engines³³ there is no statistically significant difference by socio-economic group or gender.

³³ Aggregators include Google News, Yahoo News, MSN News, AOL News and other. Search engines include Google and 'other'.

Figure 1.100 Websites or apps used for news ‘nowadays’



Source: Ofcom news omnibus 2013

Q5e) Thinking specifically about the internet, which of the following do you use for news nowadays?

Base: All who use internet for news (857)

Note: only sources with an incidence of over 2% are shown

Press titles are among the most popular sources of online news, according to comScore data

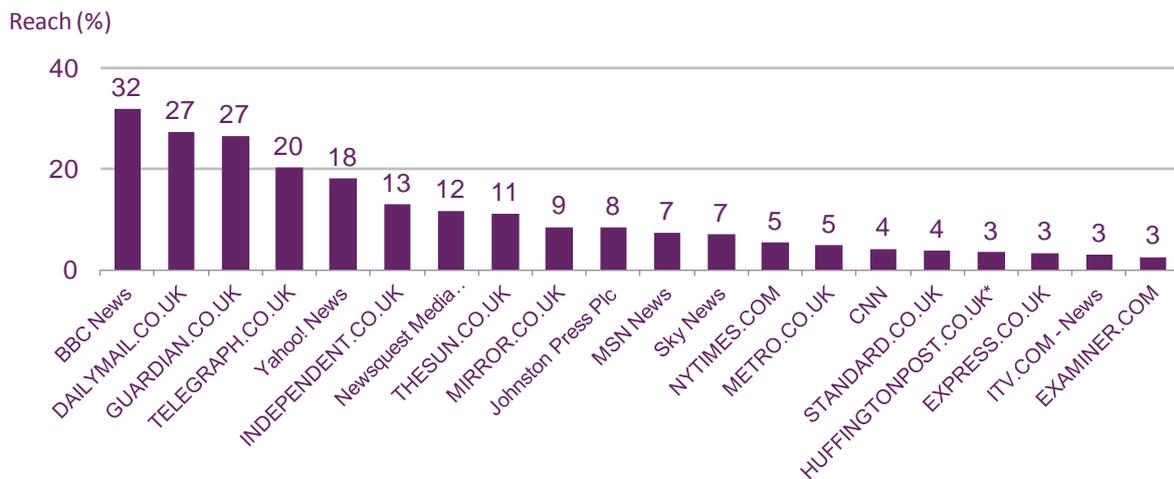
Figure 1.101 shows the top 20 selected³⁴ news websites in March 2013, from the comScore online news measurement system, which is currently the UK’s industry standard. comScore measures PC/laptop use, but does not show mobile online use. The list is taken from comScore’s ‘General News’ category, and therefore does not include websites like Facebook and the Google search engine that users nominated in our research.

BBC News has the widest monthly reach, at nearly one-third of online users, followed by The Daily Mail and The Guardian, each with around one quarter reach.

Regional print titles, represented by Newsquest and Johnston Press, generated a reach of 11.6% and 8.3% of the internet population respectively. Sites from the US, including the New York Times, CNN and the Examiner.com, also appear in this list of most-accessed news sites in the UK.

³⁴ We customised this list of news sites according to the following criteria: keeping newspaper websites in their entirety (i.e. including showbusiness, weather, sports sub-sites) given that these parts of the newspaper are included in any printed press measurement systems; focusing only on BBC news sites and de-duplicating BBC homepage (which contains news headlines) and BBC News pages; de-duplicating Yahoo! News and Yahoo! Finance to make a single entity; retaining foreign news websites in order to see their relative popularity; showing regional titles under their aggregate ownership of Newsquest and Johnston Press to show the relative popularity of regional titles; showing national press at the individual title level rather than the parent companies.

Figure 1.101 Online reach of top 20 selected news sites in the UK: March 2013



Source: comScore, March 2013, 15+. Reach is defined as the proportion of the total online audience aged 15+ who have visited the relevant site at least once in the reporting month.

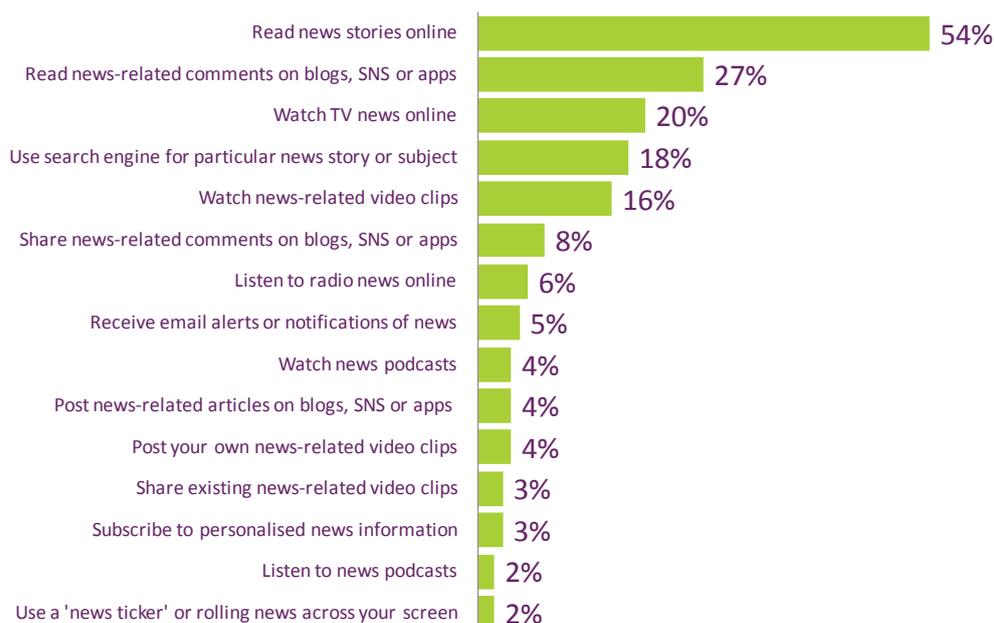
Note: Figures for the BBC and Yahoo! refer to news-specific sites in their respective reporting categories. Newsquest and Johnston Media are aggregated audiences of the reporting local titles.

The ‘traditional’ way of consuming online news is the most popular – but social networking and search are popular for some

Online, there are a range of different ways in which people can consume news output, and our research has highlighted that while the majority of people say they read news stories online (54%) (Figure 1.102), they also use other modes of consumption. Just over one quarter say they read news-related comments on blogs or social networks, one in five say they watch audio-visual content online, and one in six (18%) say they use a search engine to find out more about a particular story, or watch news-related video clips (16%).

People aged 55+ are more likely than 16-24s to say they read news stories online – 62% vs. 49%; while 16-24s are three times more likely to say they read news-related comments on blogs or social media (40% vs. 13% for over-55s). Watching TV news online and using a search engine command similar levels of popularity among both these age groups; younger people are more likely to watch news-related video clips (18% vs. 9%) and share existing news-related comments or blogs (10% vs. 3%).

Figure 1.102 Ways in which online news is accessed



Source: Ofcom news omnibus 2013

Q6a) In which types of ways do you access and use news through the internet or apps nowadays?

Base: All who use any internet for news nowadays (857)

1.9.8 Attitudes to news across all platforms

This section looks at the importance that people attach to their news sources, and examines the relative attributes of news. To this end, we asked people to consider whether each news source they consumed was trustworthy, accurate and reliable, impartial and unbiased, and offered a range of views.

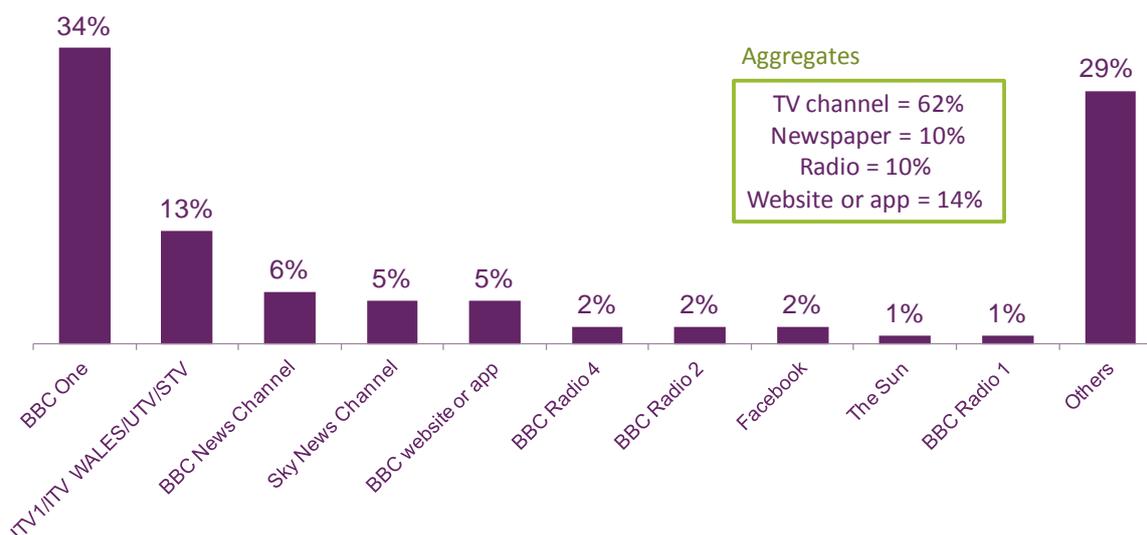
TV channels remain the most important news sources, but one in seven nominate a website or app, rising to 30% of 16-24s

Figure 1.103 shows how, among news sources, BBC One is regarded by one third of news users as the most important. ITV news is seen as most important by a further one in eight users. At an aggregate level, 62% say that a TV channel is their most important news source, and 14% say this is a website/app. One in ten nominate a printed newspaper, and one in ten a radio station, as their most important news source.

There are differences by age, gender and socio-economic group in the importance people ascribe to various news sources – BBC One is more likely to be nominated by people aged 55+ for news (43%) compared to 16-34s (26%). The news on ITV is more likely to be nominated as most important by women (18%) than by men (8%) and by those in C2DE households (18%) rather than ABC1 households (8%), although there are no significant differences by age group.

People aged 16-24 are less likely to nominate a TV news source as most important (46% vs. 62% for all UK adults). They are twice as likely to nominate an online source – 30% vs. 14% of all adults. However, there is no difference in terms of radio and newspapers (both 11% vs. 10%)

Figure 1.103 Single most important news source



Source: Ofcom news omnibus 2013

Q8a) Looking at all the sources of news you have said that you use, which one IS MOST IMPORTANT TO YOU PERSONALLY?

Base: All who use any news source nowadays (2628)

In addition to asking about the importance of news sources, we also asked people to rate their sources of news according to four key attributes, and say whether they felt they were:

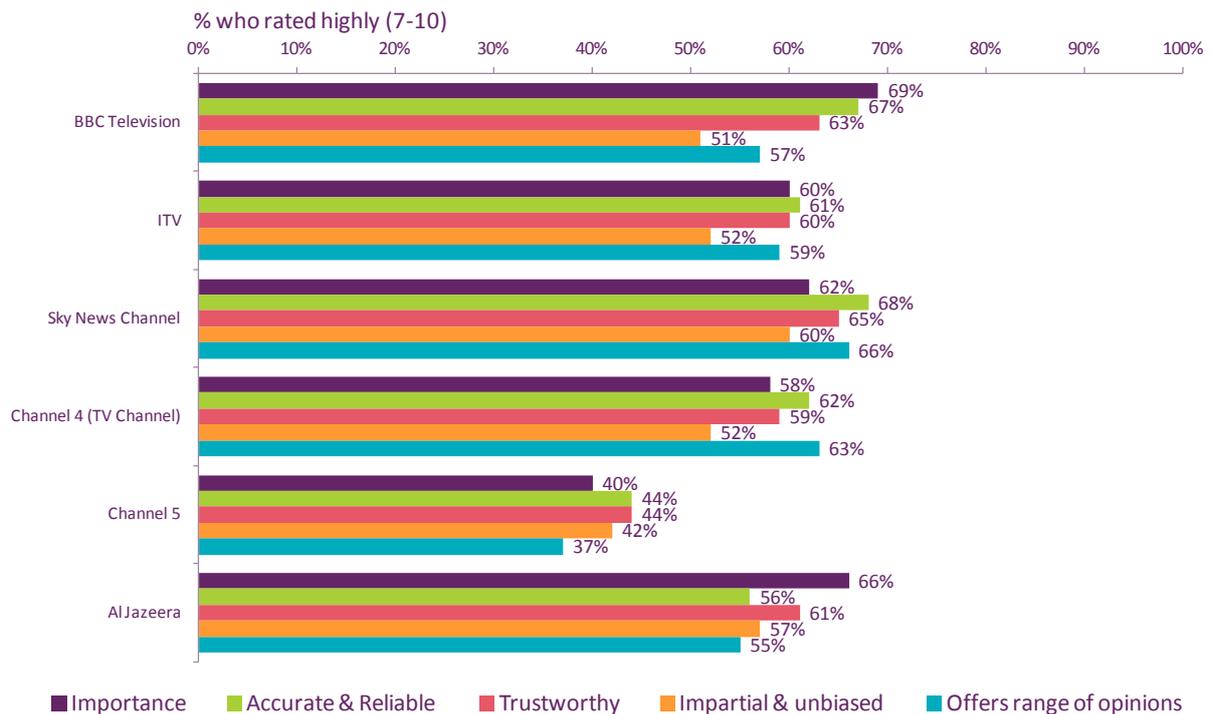
- accurate and reliable;
- trustworthy;
- impartial and unbiased; and
- offering a range of opinions.

The following four figures show how these attributes relate to the most-used sources on each platform, and show the proportion of users who rated each news source highly (7-10 out of 10). It is important to stress that these responses are from people who use each of the news sources cited in the chart, rather than a general perception from news users as a whole.

Among users of the most-used TV news outlets, the majority rate them highly across all the attributes, with the exception of Channel 5 news viewers

Among their users, Sky News and Channel 4 are both rated highly for offering “a range of opinions”, and Sky News and the BBC rate highly for being “accurate and reliable”. Channel 5 News is rated less highly than the other news outlets across the range of attributes.

Figure 1.104 Attributes of television news sources



Source: Ofcom news omnibus 2013

Base: Those who use platform to access the news 'nowadays' on each type (varies); only includes bases over 50

Note: News sources are ordered by consumption levels

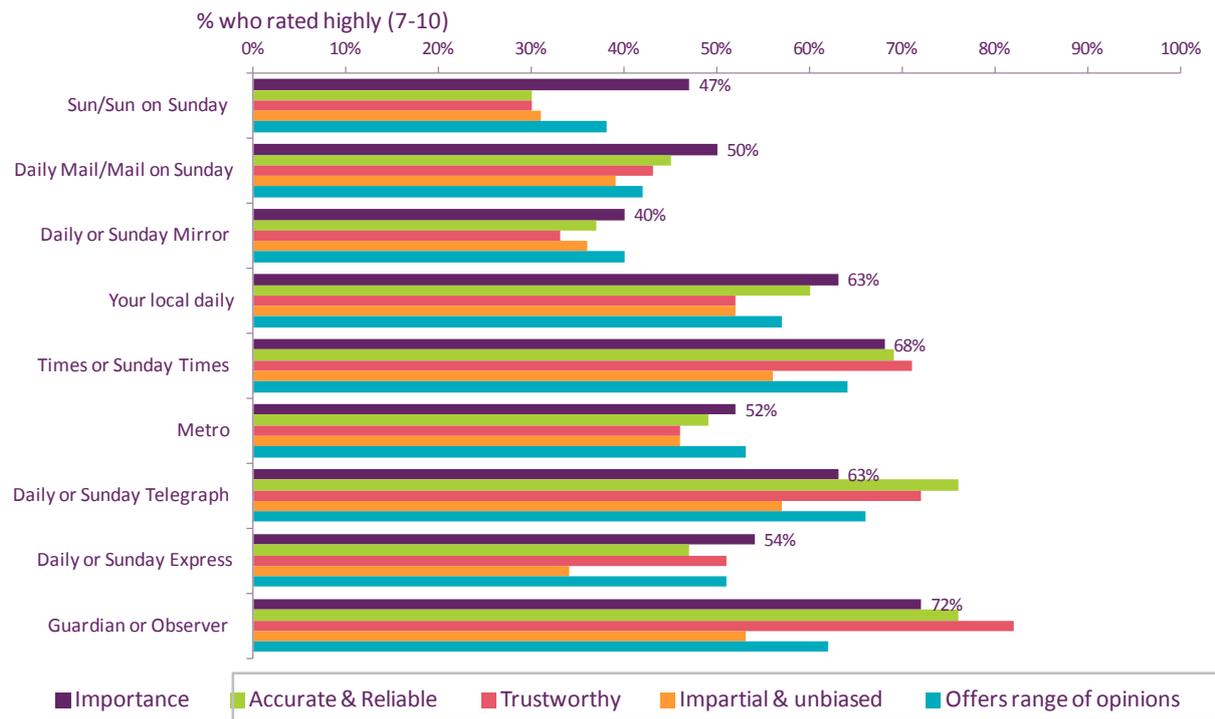
Ratings vary across newspaper readers, with broadsheet readers rating their print media sources particularly highly for being 'trustworthy'

There is variation among readers of newspapers in terms of their perception of which attributes apply. Readers of The Guardian/ObsERVER, The Times/Sunday Times, and the Daily/Sunday Telegraph all rate them highly for accuracy and reliability, and particularly for trustworthiness. Perceptions that these papers offer a range of opinions are also relatively high, although ratings for impartiality are, unsurprisingly, somewhat lower.

Paid-for local weekly press titles are also rated fairly highly across all these attributes.

Tabloid papers such as The Sun/Sun on Sunday, the Daily/Sunday Mirror, and the Daily/Sunday Star, are rated highly by around one third of their readers across these attributes.

Figure 1.105 Attributes of newspaper sources



Source: Ofcom news omnibus 2013

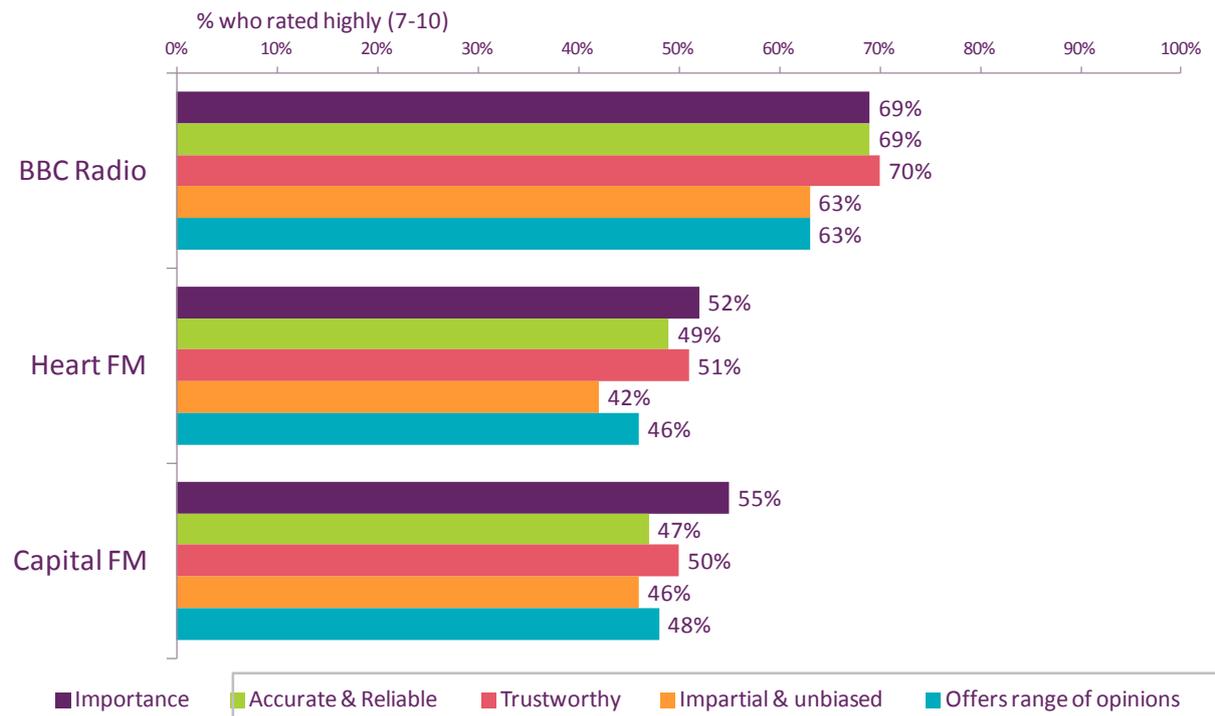
Base: Those who use platform to access the news 'nowadays' on each type (varies); only includes bases over 50

Note: News sources are ordered by consumption levels

BBC radio news listeners are more likely than commercial radio news listeners to rate its news output highly across the attributes we explored

Around seven in ten listeners to BBC radio news rate it highly in terms of its accuracy and trustworthiness, and nearly two-thirds rate it highly for being impartial and offering a range of opinions. There is a similar pattern for commercial radio news from Heart and Capital Radio, albeit at lower rating levels.

Figure 1.106 Attributes of radio news sources



Source: Ofcom news omnibus 2013

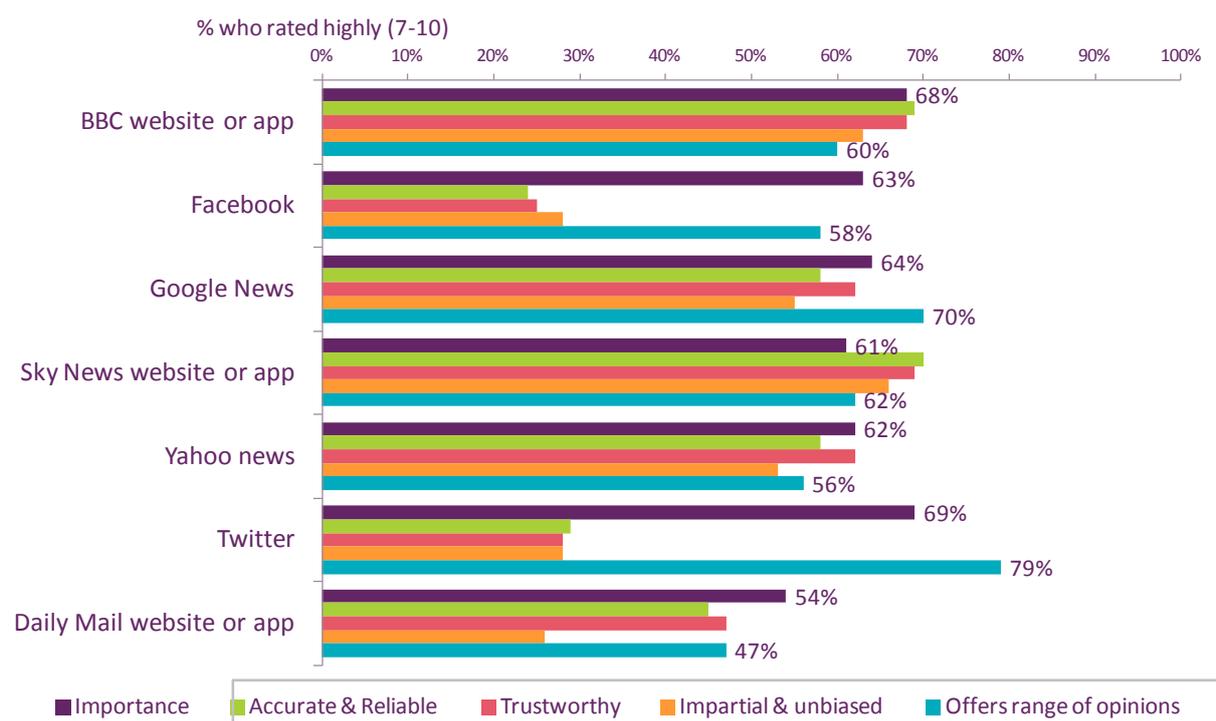
Base: Those who use platform to access the news 'nowadays' on each type (varies); only includes bases over 50

Note: News sources are ordered by consumption levels

Twitter is rated most highly by its users for offering a range of opinions

Users of news websites rate them in more differentiated ways than other platforms. While the BBC and Sky News websites are rated fairly evenly across the attributes, Twitter and Facebook are given the highest ratings for offering a range of opinions, while a minority of their users give them high ratings for other elements, such as impartiality or accuracy.

Figure 1.107 Attributes of website/ app news sources



Source: Ofcom news omnibus 2013

Base: Those who use platform to access the news 'nowadays' on each type (varies); only includes bases over 50

Note: News sources are ordered by consumption levels

1.9.9 Local news

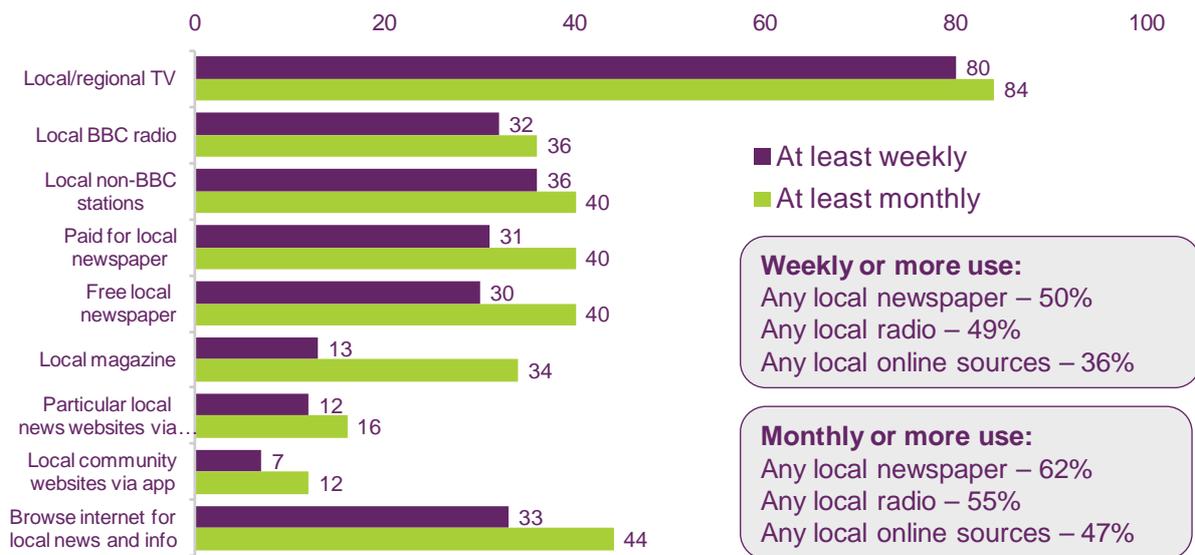
Finally, we look at a variety of measures of local news consumption, across a range of outlets. We asked people to nominate the ways in which they accessed local and regional³⁵ media, with a particular emphasis on news and information provision. We also asked them to rate the importance of these media forms, and their satisfaction with the provision.

TV channels are the most popular source of local news, although one in three browse online for local news and information

Four in five UK adults aged 15+ say they watch local or regional TV on a weekly or more frequent basis. Half say they read any local newspaper, and a similar proportion say they listen to any local radio. Over one third (36%) say they access local news/ information online.

³⁵ The definition given to respondents of 'local' was "the area in which you live" and 'regional' was "your local area and surrounding areas in the wider region".

Figure 1.108 Local news consumption: 2013



Source: Ofcom local media omnibus 2013

Q1: On average, how often do you spend doing each of the following?

Base: all UK adults aged 15+, n=2016

One in seven regular news users say online browsing for local news is their most important local source

Turning to the importance of sources of local news, we find that over half of regular local TV viewers, and just under half (47%) of online browsers, rate it as being highly important to them. Local magazines are least likely to be highly rated as personally important (25%).

While TV is most likely to be nominated as the most important local news source, one in six (17%) of regular news users say online is their most important local source. Similar numbers nominate any newspapers (16%) and any radio (14%).

Figure 1.109 Personal importance of local news: 2013 (% rating 7-10 out of 10)



Source: Ofcom local media omnibus 2013

Q2: How important are the following types of local media to you?

Q3a: And of all the local media sources you use (at least once a month) which one would you say is the most important to you personally?

Base: All UK adults 15+ who use all local media once a month or more